

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR MARCH 2024

Statistics South Africa (Stats SA) has published data on the number of tourists for March 2024 and this report provides further analysis of the tourists that travelled to South Africa during this period as well as March 2023.

TREND ANALYSIS: MARCH 2019 – MARCH 2024

A total of 750 968 tourist arrivals was recorded in March 2024 which was an increase of +14,0% (+92 264) compared to the same month in 2023. Figure 1 below indicates tourist arrivals for the period March 2019 to March 2024. Tourist arrivals decreased from 838 696 in 2019 to 535 094 in 2020 which was a decrease of -36,2% (-303 602). Tourist arrivals decreased from 535 094 in 2020 to 157 638 in 2021 due to the impact of COVID-19. Tourist arrivals then increased from 157 638 in 2021 to 359 734 in 2022. Tourist arrivals increased by +83,1% (+298 970) in 2023 compared to 2022. Tourist arrivals recorded during March 2024 was at -10,5% level of tourist arrivals recorded in 2019 pre-COVID period.

Figure 1: Total Tourist Arrivals March 2019 to March 2024



Source: Stats SA Tourism and Migration report, March 2024 and tourist arrivals data cuts

MARCH 2024 COMPARED TO MARCH 2023 BY REGION

Table 1 below indicates tourist arrivals by region for March 2024 compared to the same month in 2023. Most regions experienced a growth in tourist arrivals except for Middle East and Australasia which declined by -38,2% and -3,1% respectively during this month compared to the same month of the previous year. With regards to percentage growth, Central and South America recorded the highest increase of +81,0% (+2 719) followed by Asia (+19,1%; +2 689), Europe (+16,5%; +19 823) and North America (+16,0%; +9 715). Africa recorded an increase of +13,5% (+63 357) and this region remains the main source of tourist arrivals to the country accounting for 71,0% (+533 298) of total tourist arrivals recorded during March 2024.

Table 1: Total Tourist Arrivals by Region: March 2024 vs. March 2023

	March 2023	March 2024	Diff	% Diff
EUROPE	120 004	139 827	19 823	16.5%
NORTH AMERICA	35 804	41 519	5 715	16.0%
CENTRAL & SOUTH AMERICA	3 357	6 076	2 719	81.0%
AUSTRALASIA	9 961	9 649	-312	-3.1%
MIDDLE EAST	4 452	2 750	-1 702	-38.2%
ASIA	14 053	16 742	2 689	19.1%
TOTAL OVERSEAS	187 631	216 563	28 932	15.4%
TOTAL AFRICA	469 941	533 298	63 357	13.5%
Unspecified	1 132	1 107	-25	-2.2%
GRAND TOTAL	658 704	750 968	92 264	14.0%

Source: Stats SA Tourism and Migration Report. March 2024 and tourist arrivals data cuts

JANUARY-MARCH BY REGION FOR THE PERIOD 2019 TO 2024

Tourist arrivals figures by region for the period January-March 2019-2024 are indicated in figure 2 below. Total tourist arrivals went up by +15,4% (+326 677) for the period January-March 2024 compared to the same period in 2023. Tourist arrivals recorded during January-March 2024 was at -9,5% level of tourist arrivals recorded in 2019 pre-COVID period.

Figure 2: Total Tourist Arrivals January-March 2019 to January-March 2024

Source: Stats SA Tourism and Migration report, March 2024 and tourist arrivals data cuts

Table 2 further indicates that total tourist arrivals from overseas markets increased by +9,5% (+53 876). Central & South America (+86,0%) recorded the highest increase followed by Asia (+25,4%), Europe (+8,6%), North America (+4,7%) and Australasia (+0,3%). Middle East recorded a decline of -26,3% for the same period under review.

In Australasia, Australia recorded the highest increase in volume with an increase of 84 (+0,4%) followed by Papua New Guinea (+8; +72,7%). In Asia, China recorded the highest increase in volume (+4 918; +81,7%). Germany had recorded the highest increase in volume (+8 873; +9,9%) in the Europe region. In North America, United States of America has recorded the highest increase in volume (+3 515; +4,4%). Saudi Arabia recorded the highest increase in volume for the Middle East region with an additional +575 tourists in January to March 2024 compared to January-March 2023. In Central and South America, Brazil recorded the highest increase in volume (+7 415; +150,0%) for the same period under review.

Tourist arrivals from Africa increased by +17,6% (+273 071) during the same period under review and this region remains the main source of tourist arrivals to the country accounting for 74,5% (1 824 194) of total tourist arrivals during January-March 2024.

In terms of volume, the increase recorded from the African continent was driven by an increase of (+109 655; +21,8%) from Zimbabwe followed by Mozambique (+70 446; +20,4%) and Eswatini (+36 211; +23,5%) as indicated in Table 3 below.

TABLE 2: JANUARY-MARCH 2024 COMPARED TO JANUARY-MARCH 2023/2019

	January-March 2023	January-March 2024	2024 compared to 2023 Diff	2024 compared to 2023 %	January-March 2019	Diff: 2024 compared to 2019	% Diff: 2024 compared to 2019
EUROPE	387 296	420 727	33 431	8.6%	467 791	-47 064	-10.1%
NORTH AMERICA	94 795	99 231	4 436	4.7%	102 409	-3 178	-3.1%
CENTRAL & SOUTH AMERICA	10 195	18 963	8 768	86.0%	31 786	-12 823	-40.3%
AUSTRALASIA	24 623	24 707	84	0.3%	26 634	-1 927	-7.2%
MIDDLE EAST	11 075	8 162	-2 913	-26.3%	11 908	-3 746	-31.5%
ASIA	39 671	49 741	10 070	25.4%	75 385	-25 644	-34.0%
TOTAL OVERSEAS	567 655	621 531	53 876	9.5%	715 913	-94 382	-13.2%
TOTAL AFRICA	1 551 123	1 824 194	273 071	17.6%	1 984 554	-160 360	-8.1%
Unspecified	3 033	2 763	-270	-8.9%	3 600	-837	-23.3%
GRAND TOTAL	2 121 811	2 448 488	326 677	15.4%	2 704 067	-255 579	-9.5%

Source: Stats SA Tourism and Migration Report. March 2024 and tourist arrivals data cuts

Table 3 below gives the rankings of the top ten African source markets for the period January-March 2024 compared to January-March 2023. Half of the top ten African source markets remained in the same position except for Namibia, Zambia and Kenya moving up from 7th, 8th and 10th position in 2023 to 6th, 7th and 9th position in 2024 respectively. Malawi moved down from 6th to 8th position and Angola also moved down from 9th position to 10th position during the period under review. All of the top ten countries recorded a positive growth. Angola recorded the highest increase of +92,8% followed by Malawi (+31,0%) and Botswana (+23,6%).

Table 3: South Africa's Top 10 African Source Markets: January-March 2024 vs. January-March 2023

Country	Rank: January- March 2024	Tourist Arrivals January-March 2024	Rank: January- March 2023	Tourist Arrivals January-March 2023	% Change
Zimbabwe	1	613 675	1	504 020	21.8%
Mozambique	2	415 042	2	344 596	20.4%
Lesotho	3	329 198	3	319 009	3.2%
Eswatini	4	190 113	4	153 902	23.5%
Botswana	5	90 761	5	73 457	23.6%
Malawi	6	39 199	8	29 921	31.0%
Namibia	7	39 112	6	36 192	8.1%
Zambia	8	37 752	7	30 696	23.0%
Kenya	9	10 229	10	9 628	6.2%
Angola	10	9 887	9	10 653	92.8%

Source: Stats SA Tourism and Migration Report. March 2024 and tourist arrivals data cuts

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-March 2024 with January-March 2023, most top 10 overseas markets recorded an increase in tourist arrivals except for India (-0,9%). Belgium recorded the highest increase of +16,7%. UK remained as the main source market from overseas recording a growth of +5,3%. All of the top ten overseas source markets remained in the same position for the period January-March 2024 compared to January-March 2023 except for Canada which moved up from 9th to 7th position and India which moved down from 7th to 8th positions respectively.

Table 4: South Africa's Top 10 Overseas Source Markets: January-March 2024 vs. January-March 2023

Country	Rank: January-March 2024	Tourist Arrivals January-March 2024	Rank: January-March 2023	Tourist Arrivals January-March 2023	% Change
UK	1	125 420	1	119 118	5.3%
Germany	2	98 954	2	90 081	9.9%
USA	3	82 564	3	79 049	4.4%
The Netherlands	4	37 548	4	34 169	9.9%
France	5	34 788	5	31 423	10.7%
Australia	6	20 466	6	20 382	0.4%
Canada	7	16 667	9	15 746	5.8%
India	8	16 209	7	16 355	-0.9%
Switzerland	9	13 900	9	12 907	7.7%
Belgium	10	13 711	10	11 747	16.7%

Source: Stats SA Tourism and Migration Report. March 2024 and tourist arrivals data cuts

REFERENCES

1. Statistics South Africa 30 April 2024, March 2024 Tourism and Migration report.