

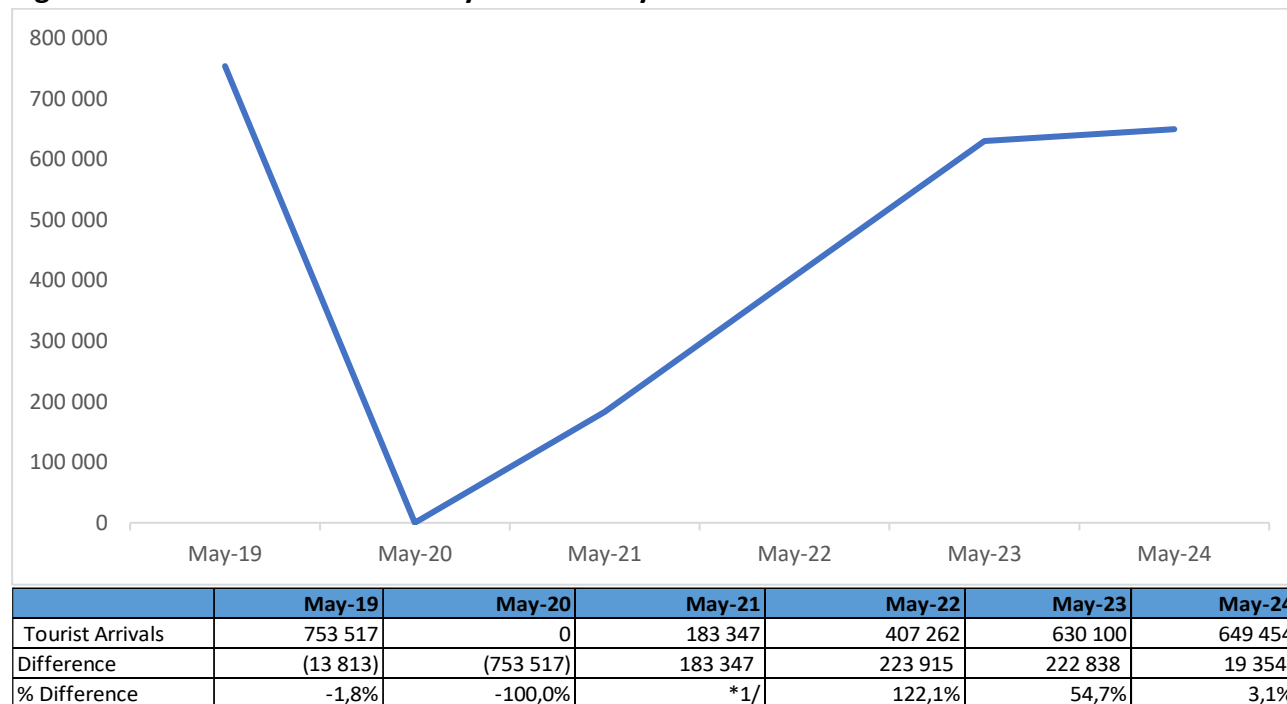
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR MAY 2024

Statistics South Africa (Stats SA) has published data on the number of tourists for May 2024 and this report provides further analysis of the tourists that travelled to South Africa during this period as compared to the same month in 2023. This report also includes the analysis of tourist arrivals for the first five months of 2024 compared to the same period in 2023.

TREND ANALYSIS: MAY 2019 – MAY 2024

A total of 649 454 tourist arrivals was recorded in May 2024 which was an increase of 3,1% (19 354) compared to the same month in 2023. Figure 1 below indicates tourist arrivals for the period May 2019 to May 2024. In May 2020, due to the closure of country borders and travel restrictions, there were no tourist arrivals recorded for the month. However, in May 2021, with the opening of country borders and travel permissions, there were 183 347 tourist arrivals recorded. Tourist arrivals then increased from 183 347 in 2021 to 407 262 in 2022 which was an increase of +122,1% (+223 915). Tourist arrivals increased by +54,7% (+222 838) in 2023 compared to 2022. The tourist arrivals in May 2024 were at a level of -13,8% compared to May 2019, before the COVID-19 pandemic.

Figure 1: Total Tourist Arrivals May 2019 to May 2024



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

MAY 2024 COMPARED TO MAY 2023 BY REGION

Table 1 below indicates tourist arrivals by region for May 2024 compared to the same month in 2023. With regards to percentage growth, Central and South America recorded the highest increase of +110,0% (+3 114) followed by Australasia (+35,8%; +2 819), North America (+12,1%; +4 399), Asia (+6,8%; +1 464), Europe (+5,1%; +3 090) and Middle East with (+3,6%; +99) during this month compared to the same month of the previous year. Africa also recorded an increase of +0,9% (+4 435) however this region remains the main source of tourist arrivals to the country accounting for 77,1% (+500 928) of total tourist arrivals recorded during May 2024

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

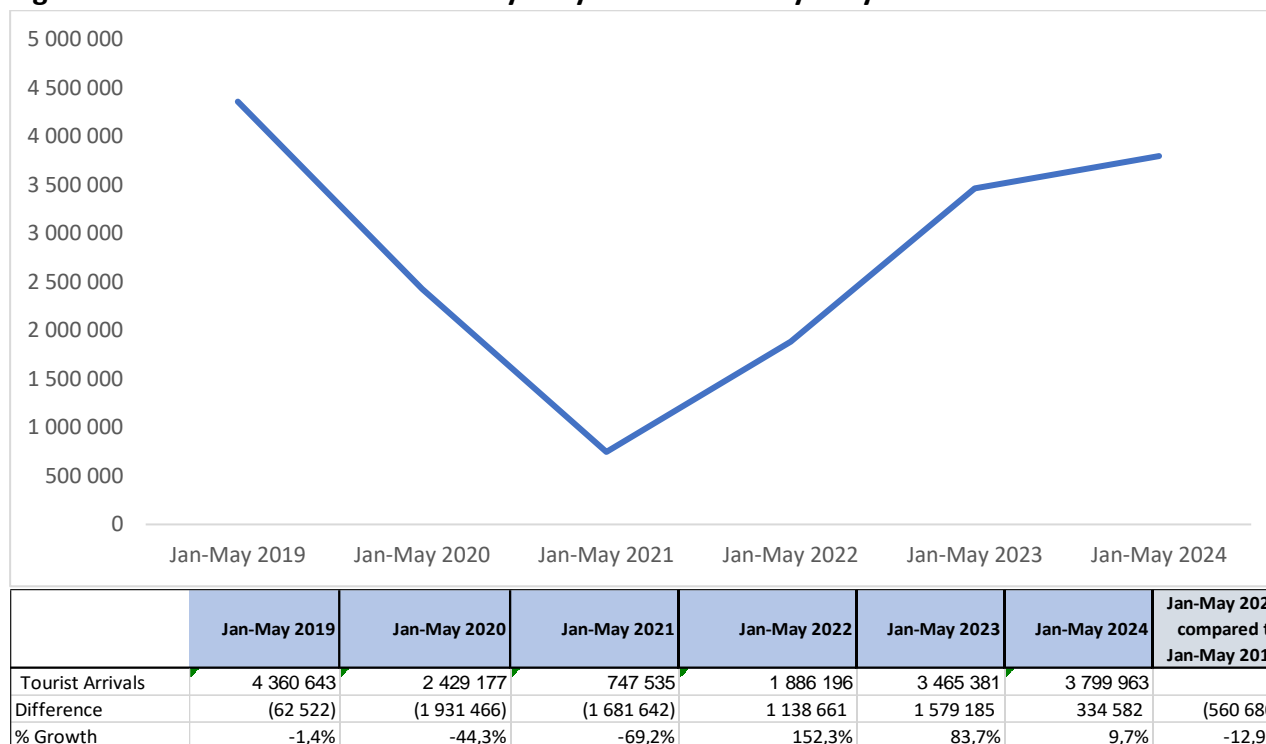
	May 2023	May 2024	Diff	% Diff
EUROPE	60 955	64 045	3 090	5,1%
NORTH AMERICA	36 461	40 860	4 399	12,1%
CENTRAL & SOUTH AMERICA	2 830	5 944	3 114	110,0%
AUSTRALASIA	7 878	10 697	2 819	35,8%
MIDDLE EAST	2 716	2 815	99	3,6%
ASIA	21 603	23 067	1 464	6,8%
TOTAL OVERSEAS	132 443	147 428	14 985	11,3%
TOTAL AFRICA	496 493	500 928	4 435	0,9%
Unspecified	1 164	1 098	-66	-5,7%
GRAND TOTAL	630 100	649 454	19 354	3,1%

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

JANUARY-MAY BY REGION FOR THE PERIOD 2019 TO 2024

Tourist arrivals for the period January-May 2019-2024 are indicated in figure 2 below. Total tourist arrivals went up by + 9,7% (+334 582) for the period January-May 2024 compared to the same period in 2023. However, the tourist arrivals during January to May 2024 were at a level of -12,9% compared to the tourist arrivals recorded in the pre-COVID period of 2019 (Jan-May).

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



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

Table 2 further indicates that total tourist arrivals from overseas markets increased by +8,0% (+68 922). Central & South America (+87,3%) recorded the highest increase followed by Asia (+15,6%), Australasia (+6,6%), North America (+6,4%) and Europe with 6,0%. Middle East recorded a decline of -17,8% for the same period under review and this could be related to the conflict between Israel and Palestine.

In Central and South America, Brazil recorded the highest increase in volume (+12 313; +160,2%) for the same period under review. In Asia, China recorded the highest increase in volume (+4 207; +32,5%). In North America, United States of America has recorded the highest increase in volume (+8 723; + 6,3%). France had recorded the highest increase in volume (+6 226; + 12,2%) in the Europe region.

In the Middle East region, Israel recorded the largest drop in tourist numbers during January-May 2024, experiencing a decline of -5 564 (-61,8%) compared to the same period in 2023.

Tourist arrivals from Africa increased by +10,2% (+266 233) during the same period under review and this region remains the main source of tourist arrivals to the country accounting for 75,4% (2 865 510) of total tourist arrivals during January-May 2024.

In terms of volume, the increase recorded from the African continent was driven by an increase of (+128 745; +15,1%) from Zimbabwe followed by Mozambique (+109 100; +19,7%) and Eswatini (+48 632; +17,5%) as indicated in Table 3 below.

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

	January-May 2023	January-May 2024	2024 compared to 2023 Diff	2024 compared to 2023 %	January-May 2019	Diff: 2024 compared to 2019	% Diff: 2024 compared to 2019
EUROPE	545 494	577 985	32 491	6,0%	677 372	-99 387	-14,7%
NORTH AMERICA	162 285	172 740	10 455	6,4%	175 829	-3 089	-1,8%
CENTRAL & SOUTH AMERICA	16 213	30 371	14 158	87,3%	48 625	-18 254	-37,5%
AUSTRALASIA	42 460	45 245	2 785	6,6%	48 575	-3 330	-6,9%
MIDDLE EAST	17 109	14 066	-3 043	-17,8%	18 469	-4 403	-23,8%
ASIA	77 184	89 260	12 076	15,6%	130 401	-41 141	-31,5%
TOTAL OVERSEAS	860 745	929 667	68 922	8,0%	1 099 271	-169 604	-15,4%
TOTAL AFRICA	2 599 277	2 865 510	266 233	10,2%	3 255 469	-389 959	-12,0%
Unspecified	5 359	4 786	-573	-10,7%	5 903	-1 117	-18,9%
GRAND TOTAL	3 465 381	3 799 963	334 582	9,7%	4 360 643	-560 680	-12,9%

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

Table 3 below gives the rankings of the top ten African source markets for the period January-May 2024 compared to January-May 2023. Most of the top ten African source markets remained in the same position. Kenya moved up from 10th position in 2023 to 9th position in 2024, and Angola dropped from 9th position in 2023 to 10th position in 2024. Lesotho and Angola recorded a negative growth rate of -14,7% and -6,7% respectively for the period under review. Malawi recorded the highest increase of +21,9% followed by Mozambique (+19,7%) and Eswatini (+17,5%).

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

Country	Rank: January-May 2024	Tourist Arrivals January-May 2024	Rank: January-May 2023	Tourist Arrivals January-May 2023	% Change
Zimbabwe	1	980 814	1	852 069	15,1%
Mozambique	2	662 778	2	553 678	19,7%
Lesotho	3	444 680	3	521 518	-14,7%
Eswatini	4	325 764	4	277 132	17,5%
Botswana	5	149 475	5	131 121	14,0%
Namibia	6	64 016	6	62 676	2,1%
Zambia	7	63 055	7	54 141	16,5%
Malawi	8	58 201	8	47 739	21,9%
Kenya	9	17 607	10	16 251	8,3%
Angola	10	15 999	9	17 146	-6,7%

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

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-May 2024 with January-May 2023, all of the top 10 overseas markets recorded an increase in tourist arrivals. Most of the top ten overseas source markets remained in the same position for the period January-May 2024 compared to January-May 2023. As indicated in table 2, the number of tourists coming to Brazil increased by 160.2%, leading the country to climb from the 21st position in 2023 to the 9th position in 2024, pushing Belgium out of the top 10.

According to Tourism Update (June 12, 2024), the rise in Brazilian tourists since January 2024 might be linked to the resumption of direct flights between Brazil and South Africa. South African Airways began operating flights from Johannesburg to São Paulo via Cape Town, with the Cape Town flights starting on October 31, and Johannesburg flights starting on November 6, last year. LATAM, a Brazilian airline, also restarted its São Paulo-Johannesburg route in September 2023, after a hiatus of three and a half years.

Switzerland dropped from 9th position in 2023 to 10th position in 2024. The Brazil recorded the highest increase of +160,2%. With regards to volume, UK remained the main source market from overseas recording a growth of +2,5%.

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

Country	Rank: January-May 2024	Tourist Arrivals January-May 2024	Rank: January-May 2023	Tourist Arrivals January-May 2023	% Change
UK	1	168 394	1	164 232	2,5%
USA	2	147 094	2	138 371	6,3%
Germany	3	122 705	3	116 902	5,0%
France	4	57 189	4	50 963	12,2%
The Netherlands	5	54 880	5	50 052	9,6%
Australia	6	37 595	6	34 694	8,4%
India	7	34 068	7	33 173	2,7%
Canada	8	25 646	8	23 914	7,2%
Brazil	9	19 998	21	7 685	160,2%
Switzerland	10	19 102	9	18 674	2,3%

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

REFERENCES

1. Statistics South Africa 25 June 2024, May 2024 Tourism and Migration report.