

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

Statistics South Africa (Stats SA) has published data on the number of tourists for September 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 nine months of 2024 compared to the same period in 2023.

TREND ANALYSIS: SEPTEMBER 2019 – SEPTEMBER 2024

A total of 666 718 tourist arrivals was recorded in September 2024 which was a decrease of -2,5% (-17 443) compared to the same month in 2023. Figure 1 below indicates tourist arrivals for the period September 2019 to September 2024. In September 2020, due to the closure of country borders and travel restrictions, there were no tourist arrivals recorded for the month. However, in September 2021, with the opening of country borders and travel permissions, there were 205 948 tourist arrivals recorded. Tourist arrivals then increased from 205 948 in 2021 to 539 202 in 2022 which was an increase of +161,8% (+333 254). Tourist arrivals increased by +26,9% (+144 959) in 2023 compared to 2022. The tourist arrivals in September 2024 were at a level of -14,6% compared to September 2019, before the COVID-19 pandemic.

Figure 1: Total Tourist Arrivals September 2019 to September 2024



Source: Stats SA International Tourism Report. September 2024 and tourist arrivals data cuts

SEPTEMBER 2024 COMPARED TO SEPTEMBER 2023 BY REGION

Table 1 below indicates tourist arrivals by region for September 2024 compared to the same month in 2023. With regards to percentage growth, Central and South America recorded the highest increase of +25,5% (+1 261) followed by Australasia (+2,5%; +259) during this month compared to the same month of the previous year. For the same period under review, Middle East recorded the highest decline of (-48,4%; -2 523) followed by Europe (-15,2%; -13 088), North America (-4,4%; -1 506) and Asia (-1,8%; -300). The decline in Middle East could be related to the conflict in the region. Africa also recorded a decrease of -0,3% (-1 439) and this region remains the main source of tourist arrivals to the country accounting for 78,5% (+523 244) of total tourist arrivals recorded during September 2024.

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

	September 2023	September 2024	Diff	% Diff
EUROPE	86 228	73 140	-13 088	-15,2%
NORTH AMERICA	34 513	33 007	-1 506	-4,4%
CENTRAL & SOUTH AMERICA	4 947	6 208	1 261	25,5%
AUSTRALASIA	10 437	10 696	259	2,5%
MIDDLE EAST	5 218	2 695	-2 523	-48,4%
ASIA	17 064	16 764	-300	-1,8%
TOTAL OVERSEAS	158 407	142 510	-15 897	-10,0%
TOTAL AFRICA	524 683	523 244	-1 439	-0,3%
Unspecified	1 071	964	-107	-10,0%
GRAND TOTAL	684 161	666 718	-17 443	-2,5%

Source: Stats SA International Tourism Report. September 2024 and tourist arrivals data cuts

JANUARY-SEPTEMBER BY REGION FOR THE PERIOD 2019 TO 2024

Tourist arrivals for the period January-September 2019-2024 are indicated in figure 2 below. Total tourist arrivals went up by +6,0% (+367 951) for the period January-September 2024 compared to the same period in 2023. However, the tourist arrivals during January to September 2024 were at a level of -13,7% compared to the tourist arrivals recorded in the pre-COVID period of 2019 (Jan-September).

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



Source: Stats SA International Tourism Report. September 2024 and tourist arrivals data cuts

Table 2 further indicates that total tourist arrivals from overseas markets increased by +2,9% (+43 266). Central & South America (+82,7%) recorded the highest increase followed by Australasia (+8,0%), Asia (+5,6%) and North America with +5,3%. Middle East and Europe recorded a decline of -17,5% and -0,5% respectively for the same period under review. Middle East decline however could be related to the conflict between Israel and Palestine as indicated above.

In Central and South America, Brazil recorded the highest increase in volume (+21 456; + 141,8%) for the same period under review. In Asia, Japan recorded the highest increase in volume (+3 855; +42,6%). In North America, United States of America has recorded the highest increase in volume (+14 893; +5,6%).

In the Middle East region, Israel recorded the largest drop in tourist numbers during January-September 2024, experiencing a decline of -12 060 (-68,2%) compared to the same period in 2023 and this could be related to the ongoing conflict between Israel and Palestine. United Kingdom had recorded the highest decrease in volume (-9 255; -3,7%) in the Europe region. Further investigation should be conducted to understand the decline in the region.

Tourist arrivals from Africa increased by +7,0% (+325 459) during the same period under review and this region remains the main source of tourist arrivals to the country accounting for 76,7% (+5 005 004) of total tourist arrivals during January-September 2024.

In terms of volume, the increase recorded from the African continent was driven by an increase of (+209 306; +21,2%) from Mozambique followed by Zimbabwe (+128 078; +8,3%) and Eswatini (+90 485; +17,1%) as indicated in Table 3 below.

Table 2: January-September 2024 compared to January-September 2023/2019

	January-September 2023	January-September 2024	Diff: 2024 compared to 2023	% Diff: 2024 compared to 2023	January-September 2019	Diff: 2024 compared to 2019	% Diff: 2024 compared to 2019
EUROPE	862 658	858 166	-4 492	-0,5%	1 070 081	-211 915	-19,8%
NORTH AMERICA	303 861	320 036	16 175	5,3%	333 024	-12 988	-3,9%
CENTRAL & SOUTH AMERICA	30 310	55 378	25 068	82,7%	87 247	-31 869	-36,5%
AUSTRALASIA	78 161	84 380	6 219	8,0%	93 276	-8 896	-9,5%
MIDDLE EAST	46 175	38 102	-8 073	-17,5%	40 761	-2 659	-6,5%
ASIA	148 137	156 506	8 369	5,6%	235 165	-78 659	-33,4%
TOTAL OVERSEAS	1 469 302	1 512 568	43 266	2,9%	1 859 554	-346 986	-18,7%
TOTAL AFRICA	4 679 545	5 005 004	325 459	7,0%	5 692 016	-687 012	-12,1%
Unspecified	9 241	8 467	-774	-8,4%	11 173	-2 706	-24,2%
GRAND TOTAL	6 158 088	6 526 039	367 951	6,0%	7 562 743	-1 036 704	-13,7%

Source: Stats SA International Tourism Report. September 2024 and tourist arrivals data cuts

Table 3 below gives the rankings of the top ten African source markets for the period January-September 2024 compared to January-September 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. Mozambique recorded the highest increase of +21,2% followed by Eswatini (+17,1%) and Kenya (+14,0%). Lesotho and Angola recorded a negative growth rate of -21,9% and -4,8% respectively for the period under review.

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

Country	Rank: January-September 2024	Tourist Arrivals January-September 2024	Rank: January-September 2023	Tourist Arrivals January-September 2023	% Change
Zimbabwe	1	1 672 440	1	1 544 362	8,3%
Mozambique	2	1 195 111	2	985 805	21,2%
Lesotho	3	689 967	3	883 832	-21,9%
Eswatini	4	618 215	4	527 730	17,1%
Botswana	5	278 252	5	245 515	13,3%
Namibia	6	117 128	6	114 621	2,2%
Zambia	7	113 511	7	102 604	10,6%
Malawi	8	110 557	8	97 842	13,0%
Kenya	9	32 551	10	28 554	14,0%
Angola	10	28 131	9	29 562	-4,8%

Source: Stats SA International Tourism Report. September 2024 and tourist arrivals data cuts

Table 4 shows the rankings of the top ten Overseas source markets. Comparing January-September 2024 with January-September 2023, most 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-September 2024 compared to January-September 2023 namely; United States of America, United Kingdom, Germany, The Netherlands, France, Australia and India. As indicated in table 2, the number of tourists coming to Brazil increased by 141,8%, leading the country to climb from the 18th position in 2023 to the 10th position in 2024. Brazil also replaced Belgium out of the top 10 for the period under review. Furthermore, Brazil recorded the highest increase of +141,8%. The rise in Brazilian tourists since January 2024 might be linked to the resumption of direct flights between Brazil and South Africa. With regards to volume, USA was the main source market from overseas recording a growth of +5,6%.

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

Country	Rank: January-September 2024	Tourist Arrivals January-September 2024	Rank: January-September 2023	Tourist Arrivals January-September 2023	% Change
USA	1	280 304	1	265 411	5,6%
UK	2	242 814	2	252 069	-3,7%
Germany	3	161 375	3	162 268	-0,6%
The Netherlands	4	91 756	4	90 639	1,2%
France	5	89 587	5	85 077	5,3%
Australia	6	70 061	6	63 949	9,6%
India	7	57 992	7	60 396	-4,0%
Canada	8	39 732	9	38 450	3,3%
Italy	9	37 839	8	39 516	-4,2%
Brazil	10	36 584	18	15 128	141,8%

Source: Stats SA International Tourism Report. September 2024 and tourist arrivals data cuts

REFERENCES

1. Statistics South Africa 29 October 2024, September 2024 International Tourism report.