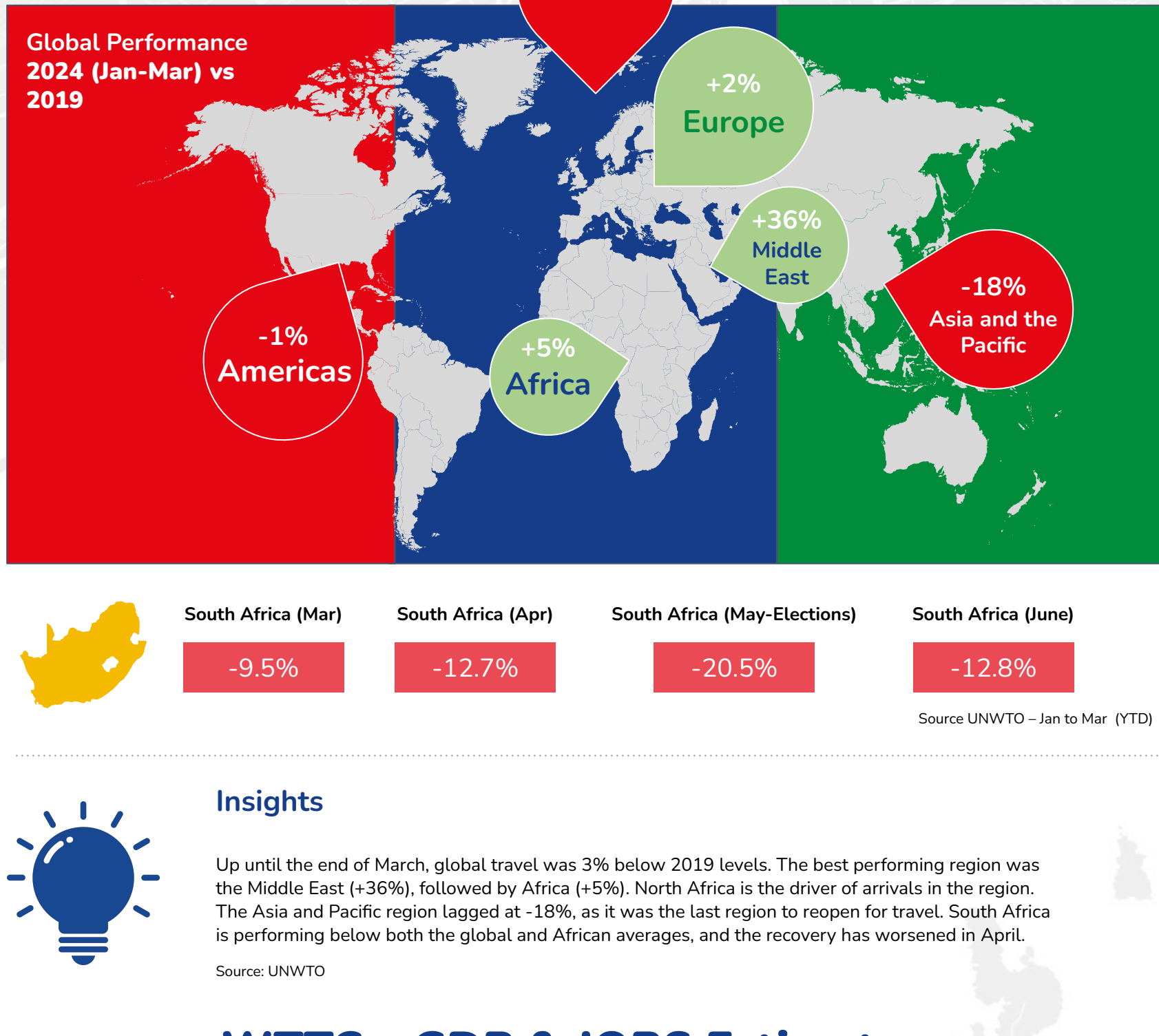


# Jan-Jun Arrivals Performance Q1 2024 TTFDs and Domestic Performance

## UNWTO Global Performance



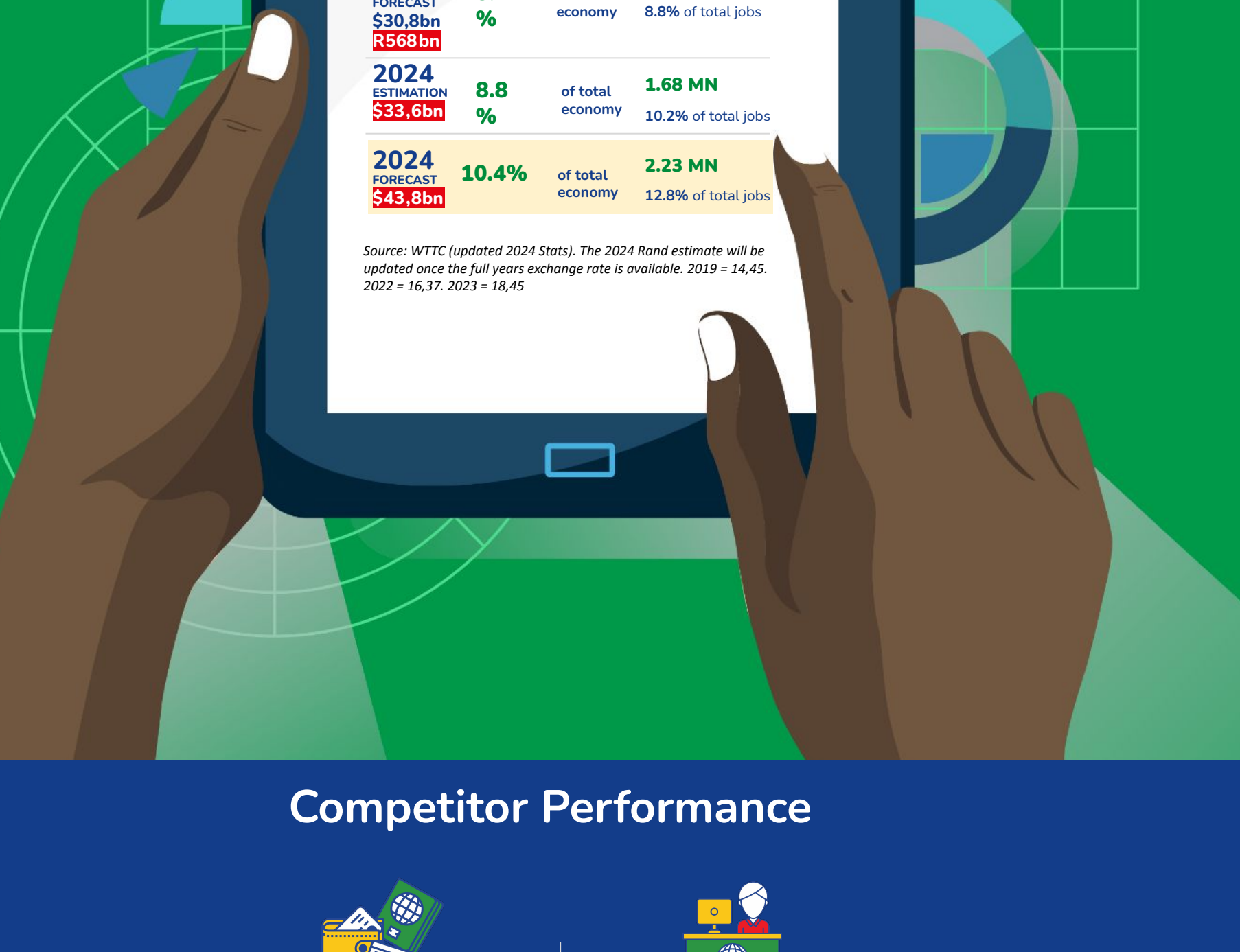
### Insights



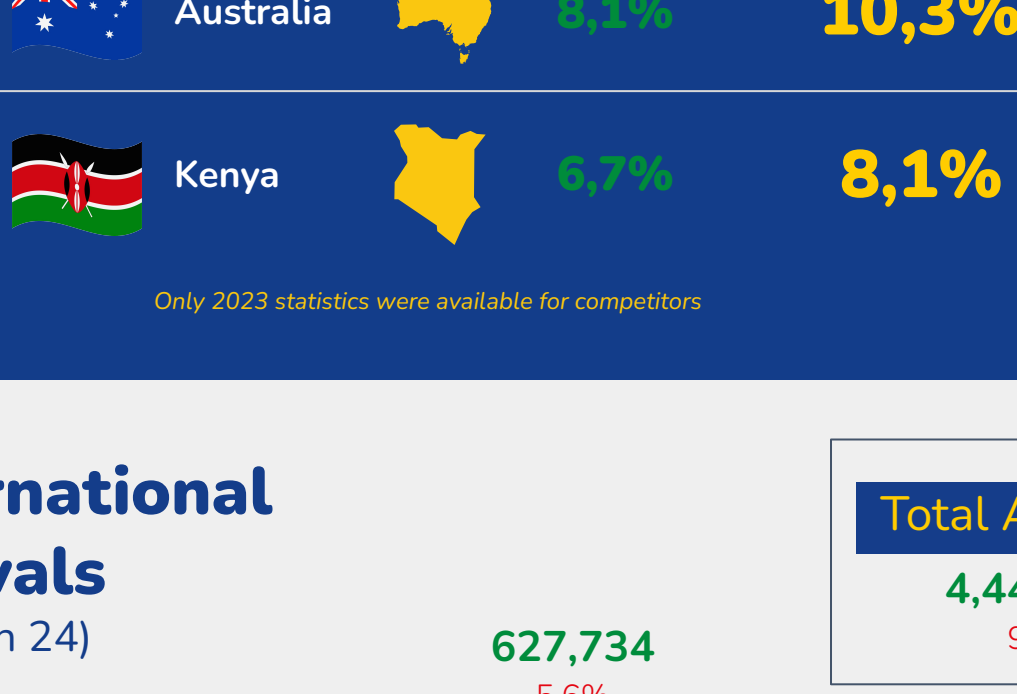
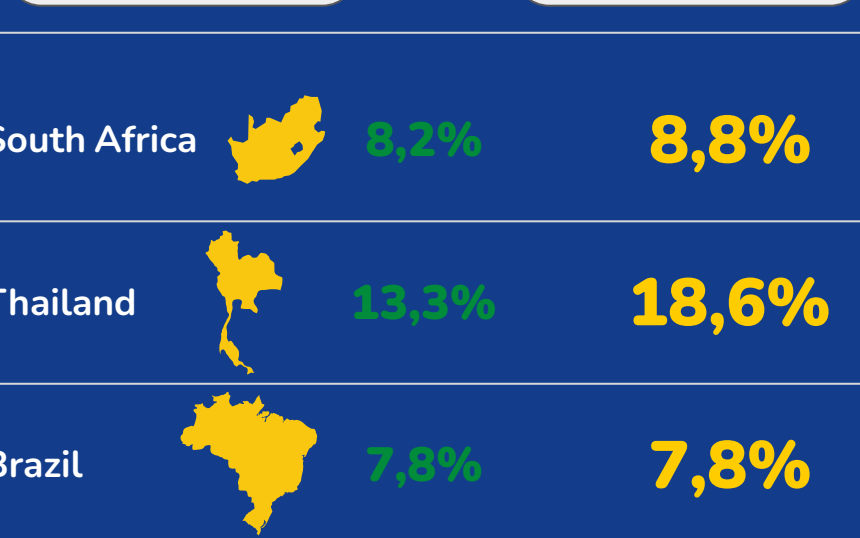
Up until the end of March, global travel was 3% below 2019 levels. The best performing region was the Middle East (+36%), followed by Africa (+5%). North Africa is the driver of arrivals in the region. The Asia and Pacific region lagged at -18%, as it was the last region to reopen for travel. South Africa is performing below both the global and African averages, and the recovery has worsened in April.

Source: UNWTO

## WTTC – GDP & JOBS Estimates



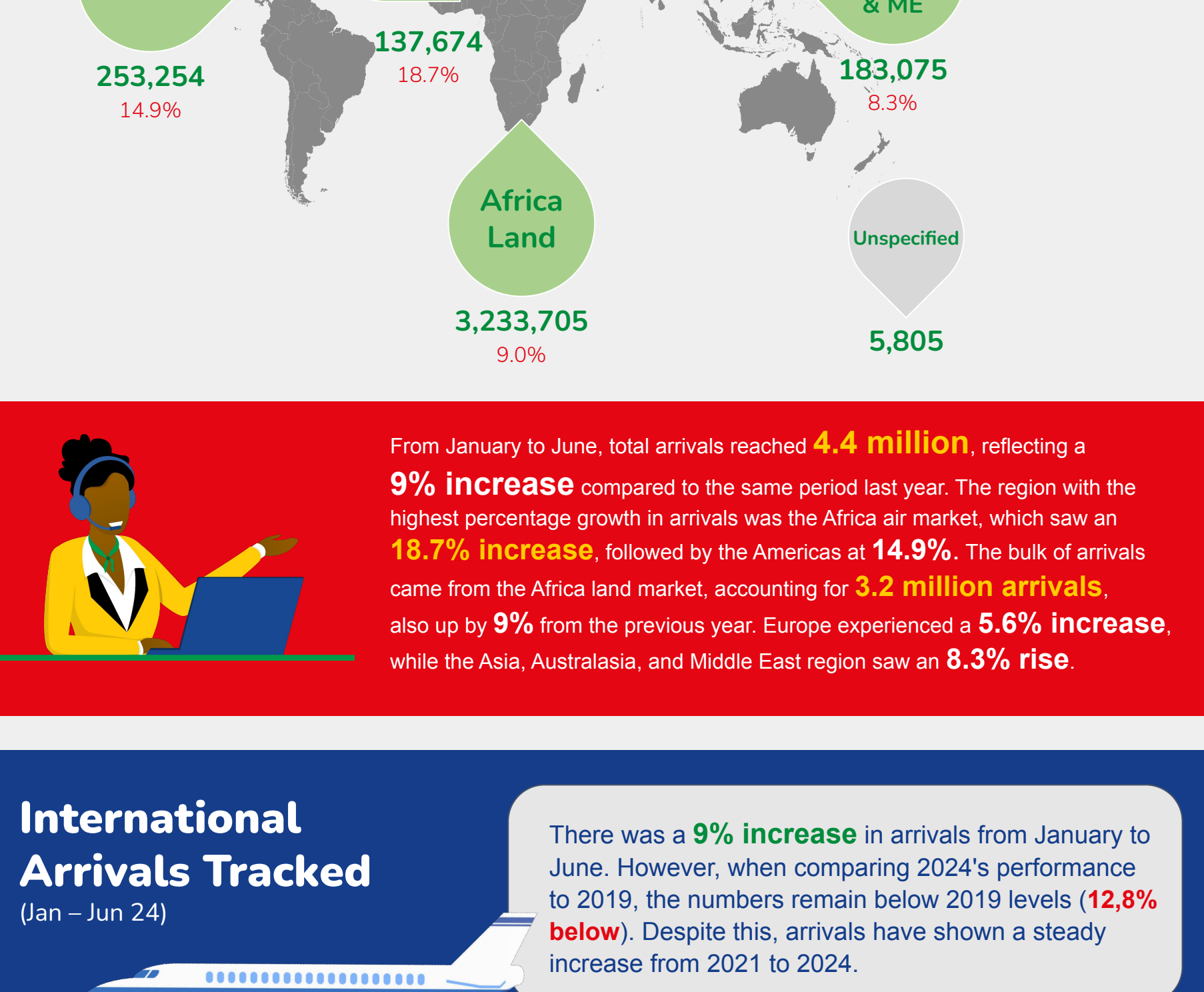
## Competitor Performance



Only 2023 statistics were available for competitors

## International Arrivals

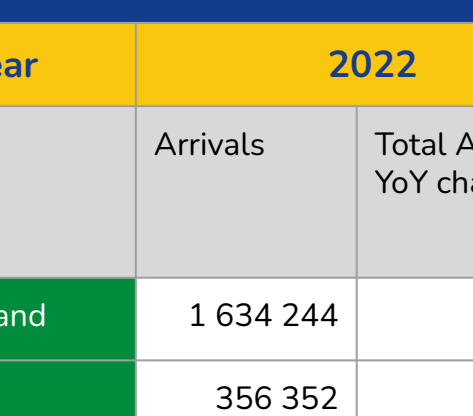
(Jan – Jun 24)



## International Arrivals Tracked

(Jan – Jun 24)

There was a **9% increase** in arrivals from January to June. However, when comparing 2024's performance to 2019, the numbers remain below 2019 levels (**12.8% below**). Despite this, arrivals have shown a steady increase from 2021 to 2024.

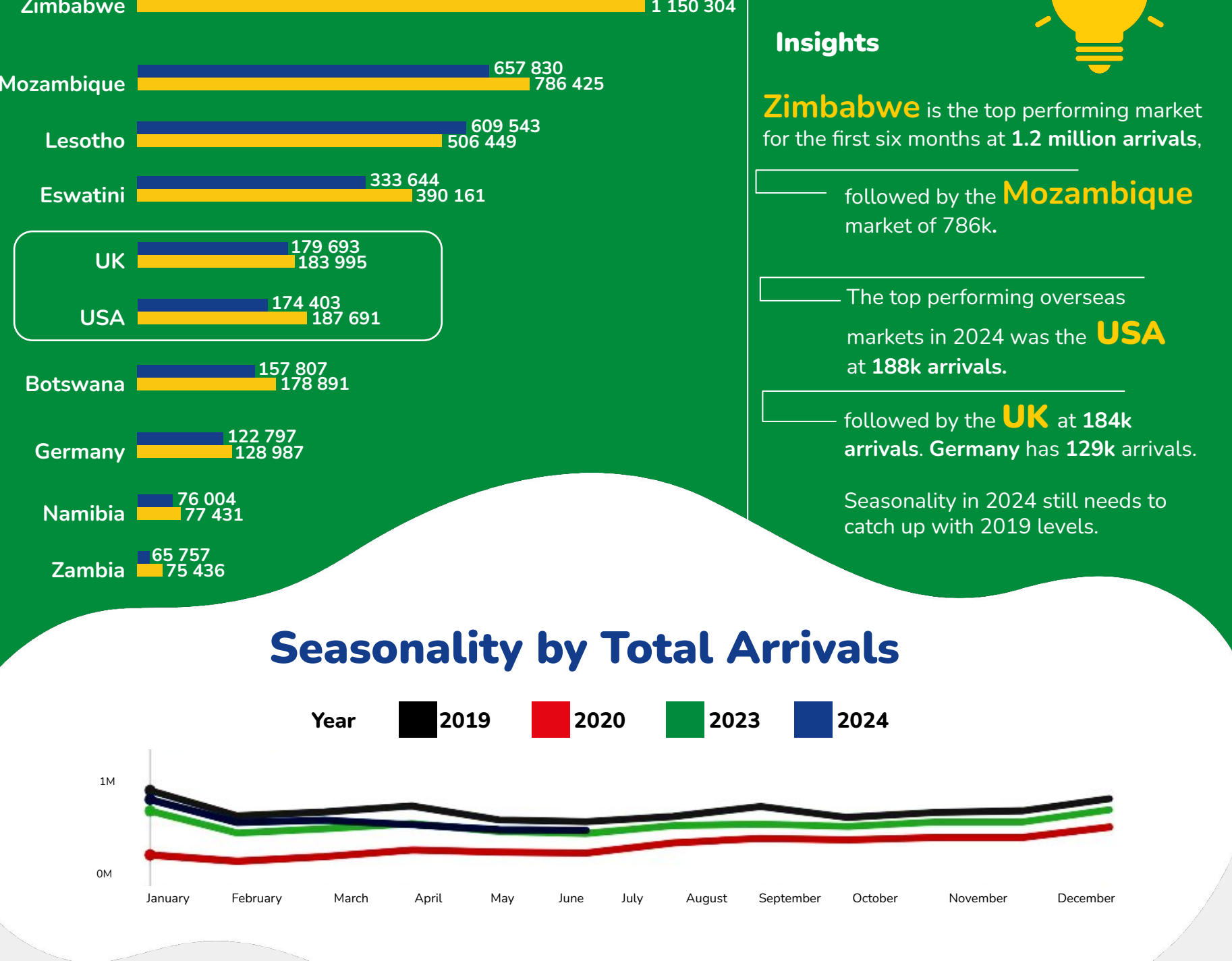


## International Arrivals Regional Performance

(Jan – Jun 24)

Americas	128 991	331,4%	220 451	70,9%	253 254	14,9%
Asia, Australia & Middle East	81 815	246,8%	168 975	106,5%	183 075	8,3%
Africa Air	80 257	128,0%	115 988	44,5%	137 674	18,7%
Unspecified	4 087	143,3%	6 303	54,2%	5 805	-7,9%
Total	2 285 746	146,8%	4 073 700	78,2%	4 441 247	9,0%

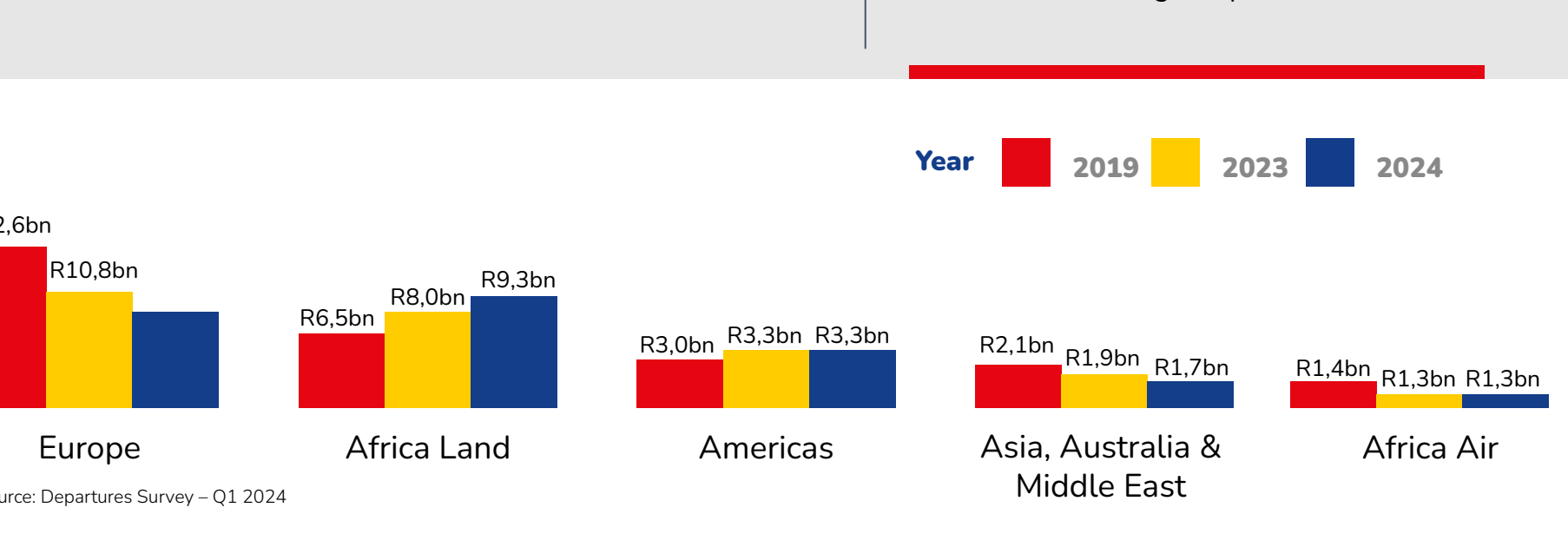
## Top Arrivals Markets (Jan-Jun)



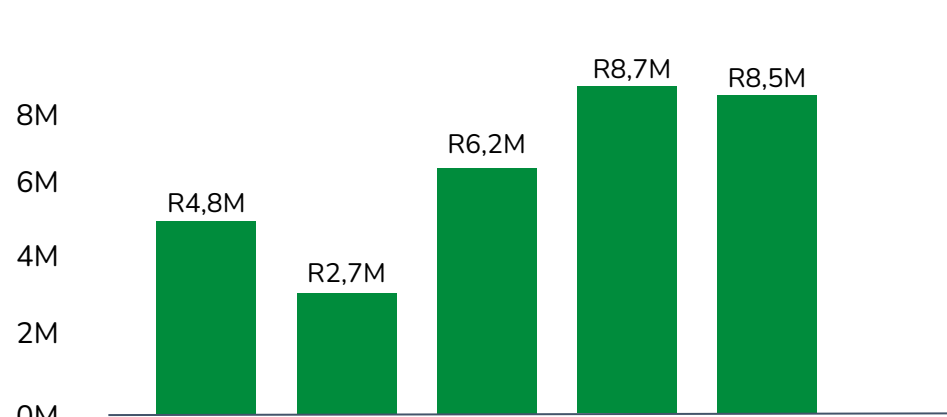
## Seasonality by Total Arrivals



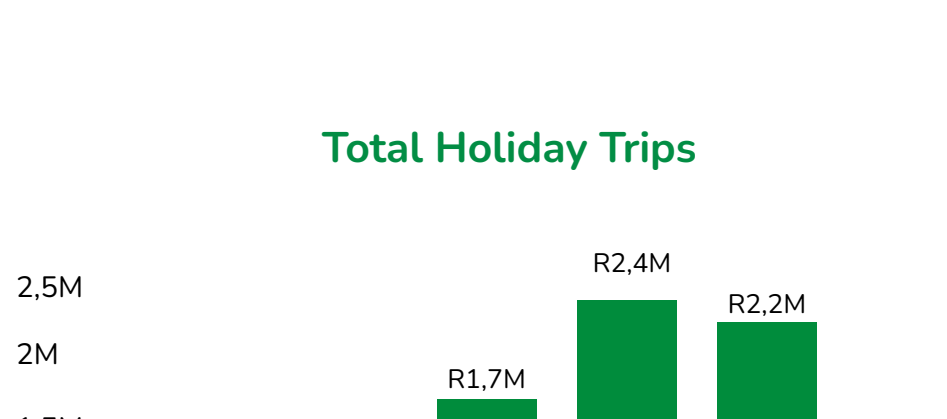
## Q1 - TTFDs (Spend) Annual Trend



## Domestic Performance Q1



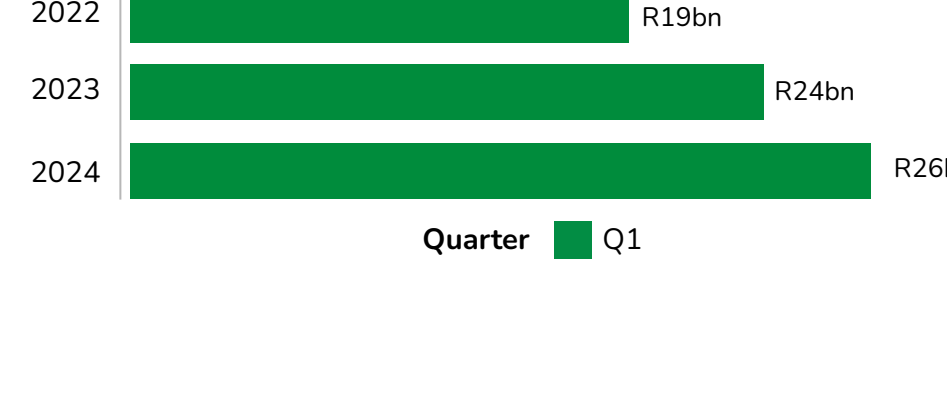
### Total Holiday Trips



### Total Spend per Trip



### Average Spend per Trip



Source: SAT Domestic Survey Q1 2024



### Insights



Total trips for Q1 of 2024 were **8.5 million**, slightly down from **8.7 million** in 2023. A similar trend is seen with holiday trips, which totalled **2.2 million** in 2024 compared to **2.4 million** in 2023. Conversely, total spend has increased, with 2024 reaching **R26 billion**, up from **R24 billion** in 2023. This improvement was driven by an increase in average spend per trip, rising from R2.7k in 2023 to R3k in 2024.

## Key Insights

### Barriers to Tourism:

- Major concerns include personal safety, the appeal of other destinations, and political uncertainty (SAT Brand Tracker), particularly in light of the 2024 national election.
- High travel costs and reduced aviation supply post-2019 are also significant barriers.
- The delayed reopening of the China market has further hindered recovery.

### Air Connectivity:

- Direct flights are crucial for improving tourist arrivals. South Africa needs to establish new direct connections and restore lost routes, particularly with Europe and the USA.

### Tourism's Economic Contribution:

- Tourism remains a vital sector for South Africa's GDP, with significant opportunities for growth.

### Opportunities for Improvement:

- Air Connectivity:** Enhance air travel options to attract more tourists.
- Visa Facilitation:** Simplify visa processes to increase international arrivals.
- Marketing:** Strategically promote South Africa's unique offerings.
- Value for Money:** Position South Africa as a value-for-money destination.
- Innovation:** Adapt tourism strategies to meet post-pandemic consumer expectations, focusing on environmental and local economic impacts.