

## Jan-Jun Arrivals Performance Q1 2024 TTFDS and **Domestic Performance**

**UNWTO Global Performance** 





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.

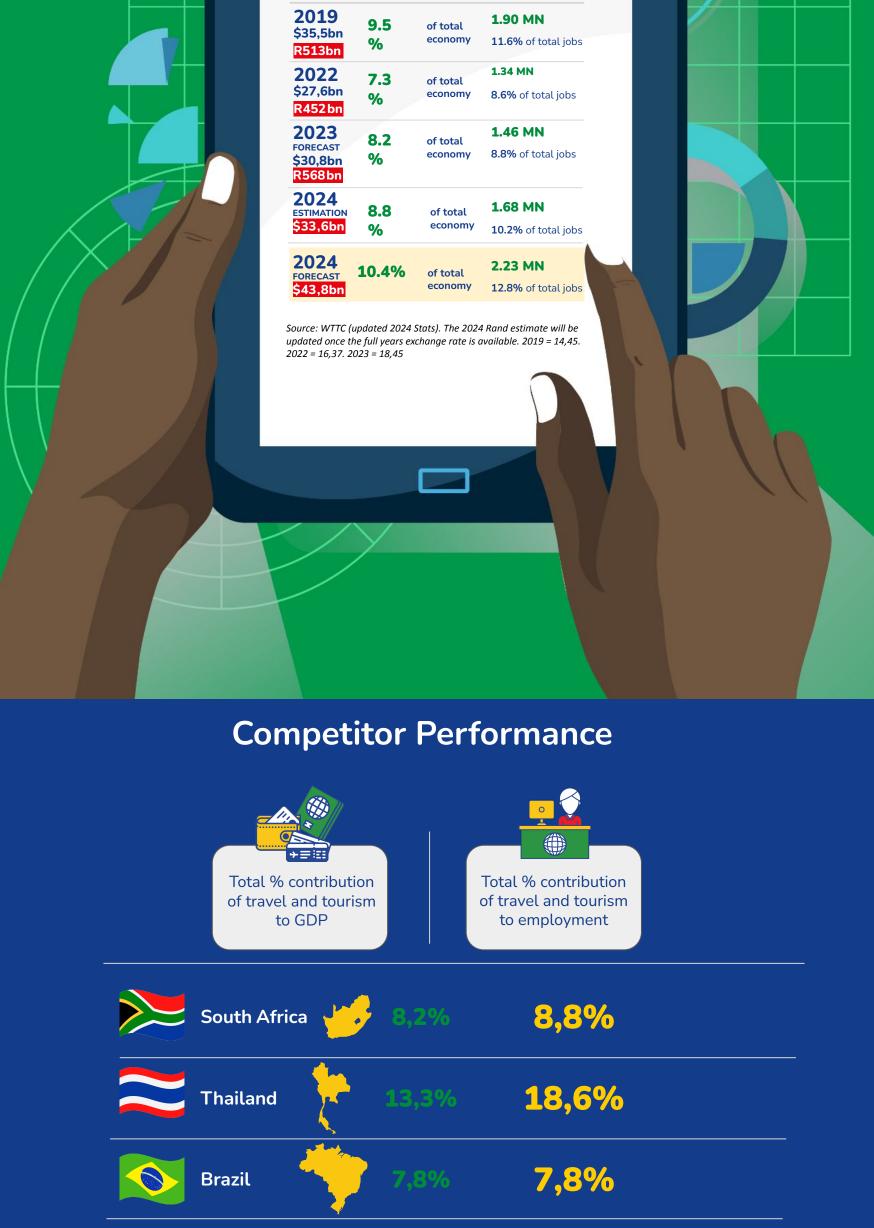
Up until the end of March, global travel was 3% below 2019 levels. The best performing region was the Middle East (+36%), followed by Africa (+5%). North Africa is the driver of arrivals in the region.



Source: UNWTO

**WTTC - GDP & JOBS Estimates** 

### South Africa key data Total % contribution of Total contribution of travel travel and tourism to GDP and tourism to employment



Australia

Kenya

**International** 

**Americas** 

253,254

**Arrivals** 

(Jan –Jun 24)

Only 2023 statistics were available for competitors

Africa Air

137,674

18.7%

627,734 5.6%

**Europe** 

10,3%

8,1%

Total Arrivals

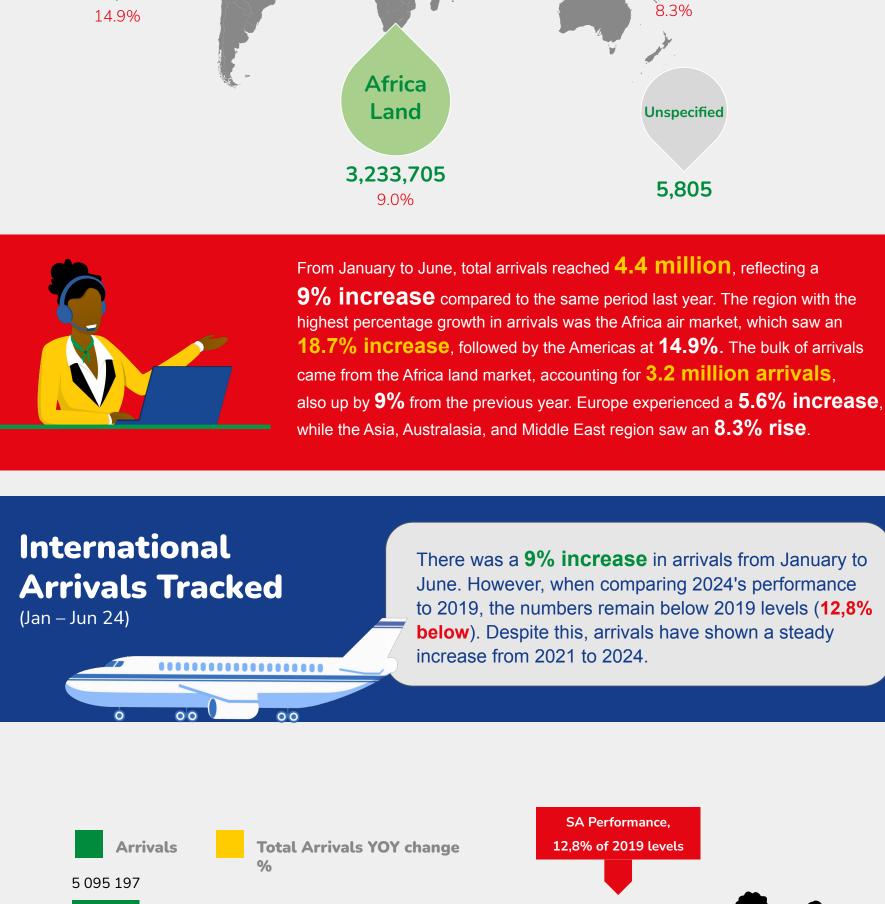
4,441,247

9.0%

Asia,

Australia & ME

183,075



146.8%

2 285 746

2022

(Jan –Jun 24)

4 073 700

78.2%

2023

2023

**International Arrivals** 

**Regional Performance** 

4 441 247

9.0%

2024

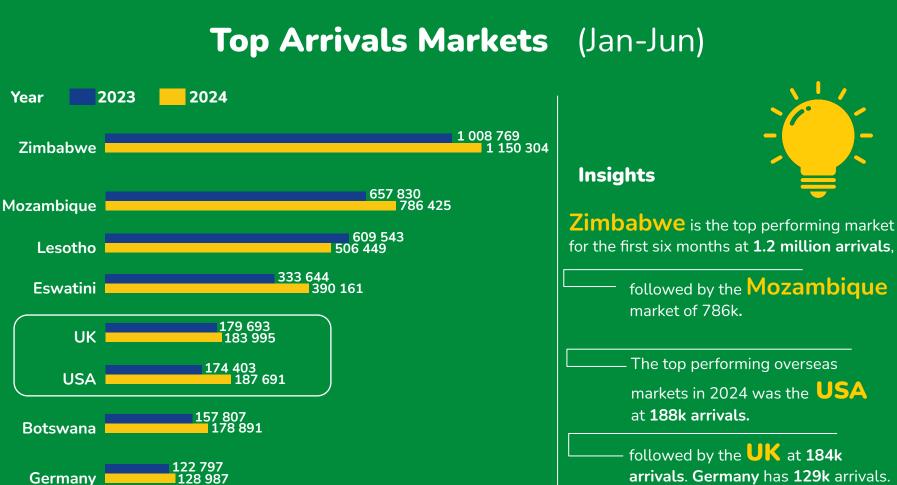
2024

Seasonality in 2024 still needs to

December

catch up with 2019 levels.

Total Arrivals Total Arrivals Arrivals Total Arrivals Arrivals YoY change % YoY change % YoY change % Africa Land 1 634 244 108.9% 2 967 595 81,6% 3 233 705 9,0% 356 352 563,4% 594 388 66,8% 627 734 5,6% Europe 331,4% 128 991 220 451 70,9% 253 254 Americas 14,9% Asia, Australia 106,5% 81 815 246,8% 168 975 183 075 8,3% & Middle East Africa Air 128,0% 80 257 115 988 44,5% 137 674 18,7% Unspecified 4 087 143,3% 6 303 54,2% 5 805 -7,9% 4 073 700 **Total** 2 285 746 146,8% 78,2% 4 441 247 9,0% Top Arrivals Markets (Jan-Jun)



2020

**Trend** 

R25bn

R26bn

**Insights** 

Total tourist foreign direct spend (TTFDS)

land markets and the Americas. The Asia,

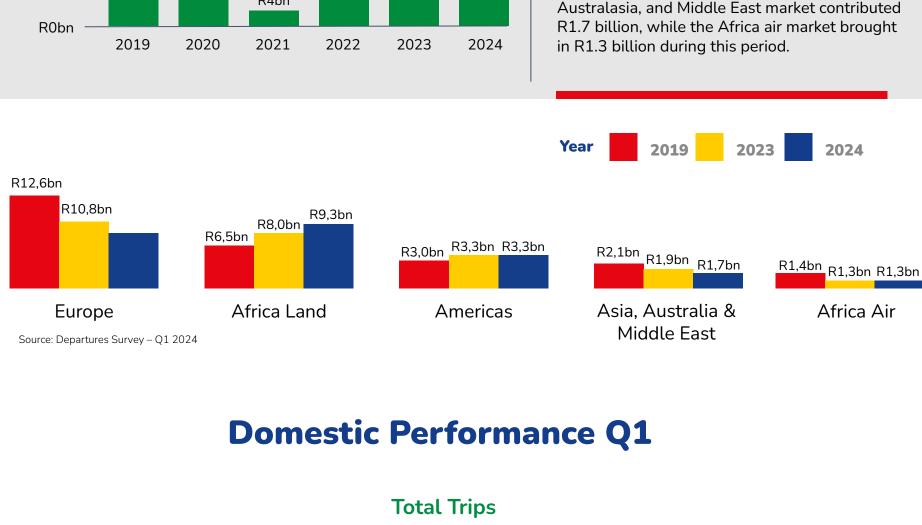
reached R26 billion in the first quarter of 2024, up from R25 billion in 2023. This matches 2019

levels for the same period. The top-performing region this quarter is Europe, followed by Africa

2023

August

2024



R8,7M

2023

R2,4M

2023

Q1

R6,2M

2022

Quarter

**Total Holiday Trips** 

R1,7M

2022

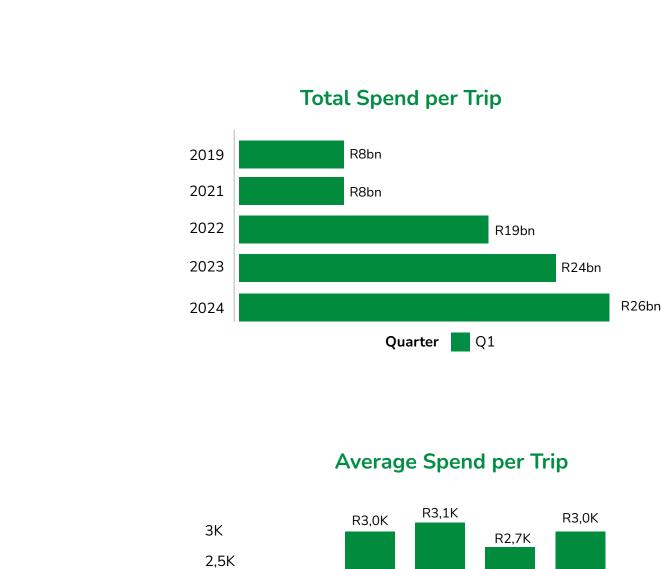
Quarter

R8,5M

2024

R2,2M

2024



# R3k in 2024.

### Major concerns include personal safety, the appeal of other destinations, and political uncertainty (SAT Brand Tracker), particularly in light of the 2024 national election.

**Barriers to Tourism:** 

- High travel costs and reduced aviation supply post-2019 are also significant barriers. The delayed reopening of the China market has further hindered recovery.
- **Tourism's Economic Contribution:**

# Air Connectivity:

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

  - Innovation: Adapt tourism strategies to meet post-pandemic consumer expectations, focusing on



-1.1%

2019

2 429 177

-52.3%

2020

926 262

2021

2022





Year

February

Namibia **-**

Zambia 65 757 75 436

R26bn

R20bn

R10bn

Q1 - TTFDS (Spend) Annual R19bn R10bn

R4bn

April

R4,8M R2,7M 2019 2021

8M

6M

4M

2M

0M

2,5M

2M

1,5M

1M

0M

R1,1M

2019

R0,5M

2021

**Insights** 

2K

1,5K

1K

0K 2019 2021

R1,7K

2022 2023 Quarter Q1 Source: SAT Domestic Survey Q1 2024

2024

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 totaled **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 **Key Insights** 

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.

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. environmental and local economic impacts.

