

South Africa

Inbound Recovery

Overseas Arrivals to South Africa (2000 – 2025)

Period	Total Arrivals	Year on Year Change
2000	1,394,395	1.80%
2001	1,369,678	-1,77%
2002	1,484,281	8.37%
2003	1,679,003	13.12%
2004	1,787,558	6.47%
2005	1,833,213	2.55%
2006	1,936,423	5.63%
2007	2,012,326	3.92%
2008	2,068,974	2.82%
2009	2,027,429	-2.01%
2010	2,177,842	7.42%
2011	2,240,857	2.89%

Period	Total Arrivals	Year on Year Change
2012	2,307,486	2.98%
2013	2,229,131	-3,40%
2014	2,269,422	1.81%
2015	2,157,659	-4.92%
2016	2,542,651	17.84%
2017	2,725,855	7.21%
2018	2,685,748	-1.47%
2019	2,612,159	-2.73%
2020	664,796	-74.54%
2021	382,090	-42.53%
2022	1,460,801	282.32%
2023	2,060,313	41.03%
2024	2,136,641	3.70%
2025	2 391 187	11,90%

Arrivals to South Africa: 2019 vs 2024 (Full Year)

Year	UK	USA	Germany	France	Netherlands	Australia	India	Canada	Brazil	Mexico	China	Italy	Scandinavia
2019	436,559	373,694	322,720	165,035	144,071	111,439	95,621	66,577	77,261		93,171	64,764	93,950
2023	356,160	353,975	245,259	119,974	131,371	86,250	79,774	55,056	25,672	4,511	37,164	52,091	62,166
2024	349,883	372,362	254,992	125,823	132,422	98,544	75,541	58,057	49,855	4,819	41,418	50,780	62,252
% Recovery 2019 vs 2024	80.14%	99.64%	79.01%	76.24%	91.91%	88.42%	79%	87.20%	64.52%	106.82%	44.45%	78.40%	66.26%

**Scandinavia = Sweden, Norway, Finland, Denmark*

Arrivals to South Africa: 2019 vs 2025 (Full Year)

Year	USA	UK	Germany	France	Netherlands	Australia	Canada	India	Italy	Brazil	China
2019	373 694	436 559	322 720	165 038	144 071	111 439	66 577	95 621	64 764	77 261	93 171
2023	353 975	356 160	245 259	119 974	131 371	86 250	55 056	79 774	52 091	25 672	37 164
2024	372 362	349 883	254 992	125 823	132 422	98 544	58 057	75 541	50 780	49 855	41 418
2025	391 939	403 714	290 795	135 007	140 338	121 361	65 744	69 680	55 947	63 848	37 902
% Recovery 2019 vs 2025	104,9%	92,5%	90,1%	81,8%	97,4%	108,9%	98,7%	72,9%	86,4%	82,6%	40,7%

Arrivals to South Africa: 2019 vs 2025 (Quarter 3)

Year	USA	UK	Germany	France	Netherlands	Australia	India	Italy	Brazil	China
2019	103 023	84 870	57 435	36 507	42 364	30 010	21 158	23 352	19 845	24 540
2023	91 008	72 376	39 471	28 664	36 556	22 329	18 728	20 836	6 010	12 118
VAR YOY (2019 vs 2023)	88,3%	85,3%	68,7%	78,5%	86,3%	74,4%	88,5%	89,2%	30,3%	49,4%
2024	92 613	58 819	32 388	26 749	32 847	24 499	15 959	17 848	12 615	10 936
VAR YOY (2023 vs 2024)	101,8%	81,3%	82,0%	93,3%	89,9%	109,7%	85,2%	85,7%	209,9%	90,2%
2025	108 105	77 610	41 120	30 272	35 754	35 811	16 674	20 506	18 028	9 620
VAR YOY (2024 vs 2025)	116,7%	131,9%	126,9%	113,2%	108,9%	146,2%	104,5%	114,9%	142,9%	88%
% Recovery 2019 vs 2025	104,9%	91,4%	71,6%	82,9%	84,4%	119,3%	78,8%	87,8%	90,8%	39,2%

Overall Performance: 2019, vs 2023 & 2024 (Jan – Dec)

Region	2019	2023	2024	Recovery 2019 vs 2024
Overseas Arrivals	2,612,159	2,060,313	2,136,641	81.79%

Overseas Arrivals	Recovery (2019 vs 2024)
Q1 (Jan-Mar)	87%
Q2 (Apr – Jun)	82%
Q3 (July – Sep)	74%
Q4 (Oct - Dec)	83%

Overseas Arrivals	Recovery (2019 vs 2024)
2023 YE	79%
Jan – Jun 2024 (HY)	85%
Jan - Dec 2024 (FY)	82%

Overall Performance: 2019, vs '23, '24 & '25 (Jan-Dec)

Region	2019	2023	2024	2025	Recovery 2019 vs 2025
Overseas Arrivals	2 612 159	2 060 313	2 136 641	2 391 187	91,54%

Overseas Arrivals (Seasonality)	Recovery (2019 vs 2025)
Q1 (Jan-Mar)	90%
Q2 (Apr - Jun)	88%
Q3 (Jul-Sep)	92%
Q4 (Oct - Dec)	96%

Overseas Arrivals	Recovery (2019 vs 2025)
2023 YE	79%
2024 YE	82%
2025 YE	92%

China & India Arrivals (Mar-Dec)

Source Market	March - Dec 2019	March - Dec 2024	Difference ('19 vs '24)	March - Dec 2025	Difference ('19 vs '25)
China	75 261	34 819	46,3%	30 908	41,0%
India	82 192	64 535	78,5%	57 787	70,3%

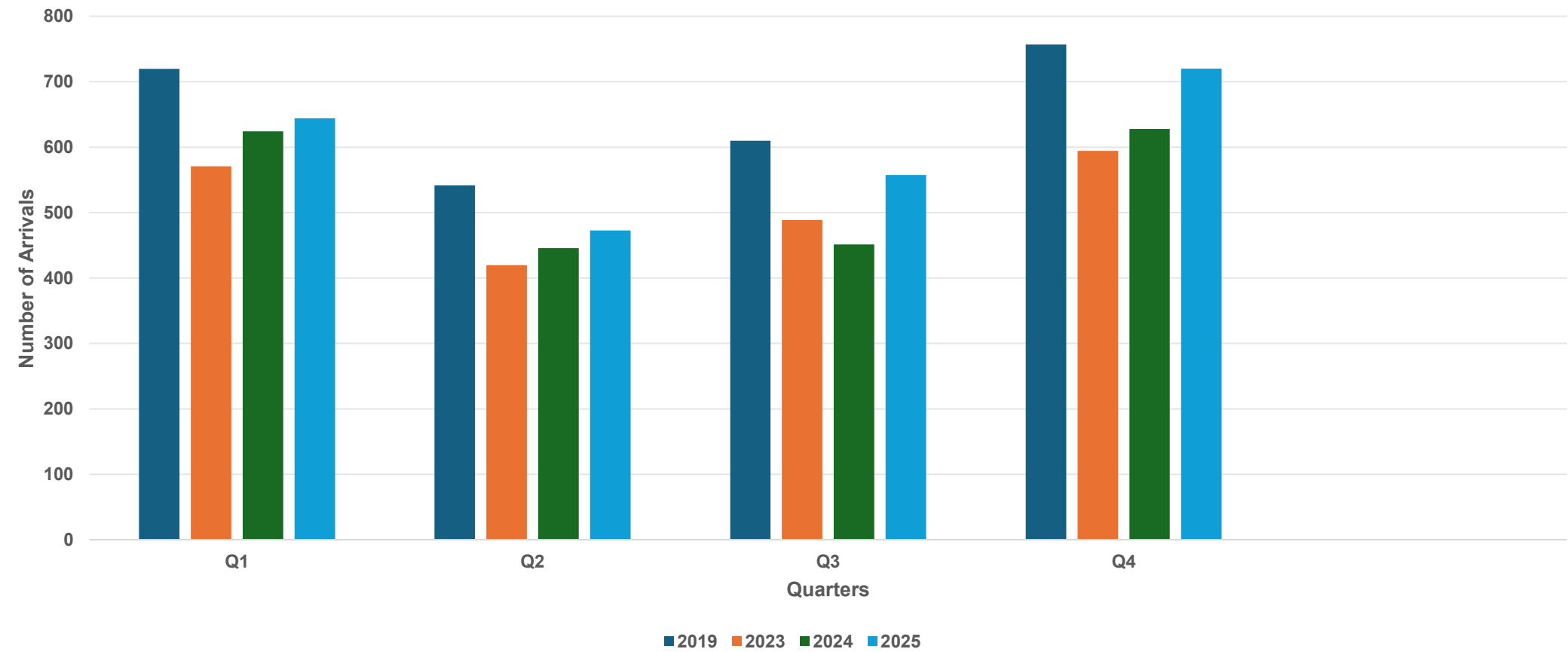
China	2019	2024	2025
March	7 679	4 340	4 150
April	6 712	3 006	2 717
May	7 259	3 196	3 431
June	6 721	3 499	2 997
July	7 635	3 243	3 335
Aug	7 460	3 702	3 255
Sep	9 445	3 991	3 030
Oct	7 969	3 269	2 833
Nov	8 416	3 580	2 951
Dec	5 965	2 993	2 159

India	2019	2024	2025
March	7 043	5 203	5 015
April	8 534	6 164	5 627
May	13 328	11 695	8 284
June	9 315	7 965	6 628
July	6 589	5 033	5 209
Aug	7 555	5 406	5 838
Sep	7 014	5 520	5 627
Oct	8 509	5 352	5 301
Nov	7 247	6 700	5 426
Dec	7 058	5 497	4 832

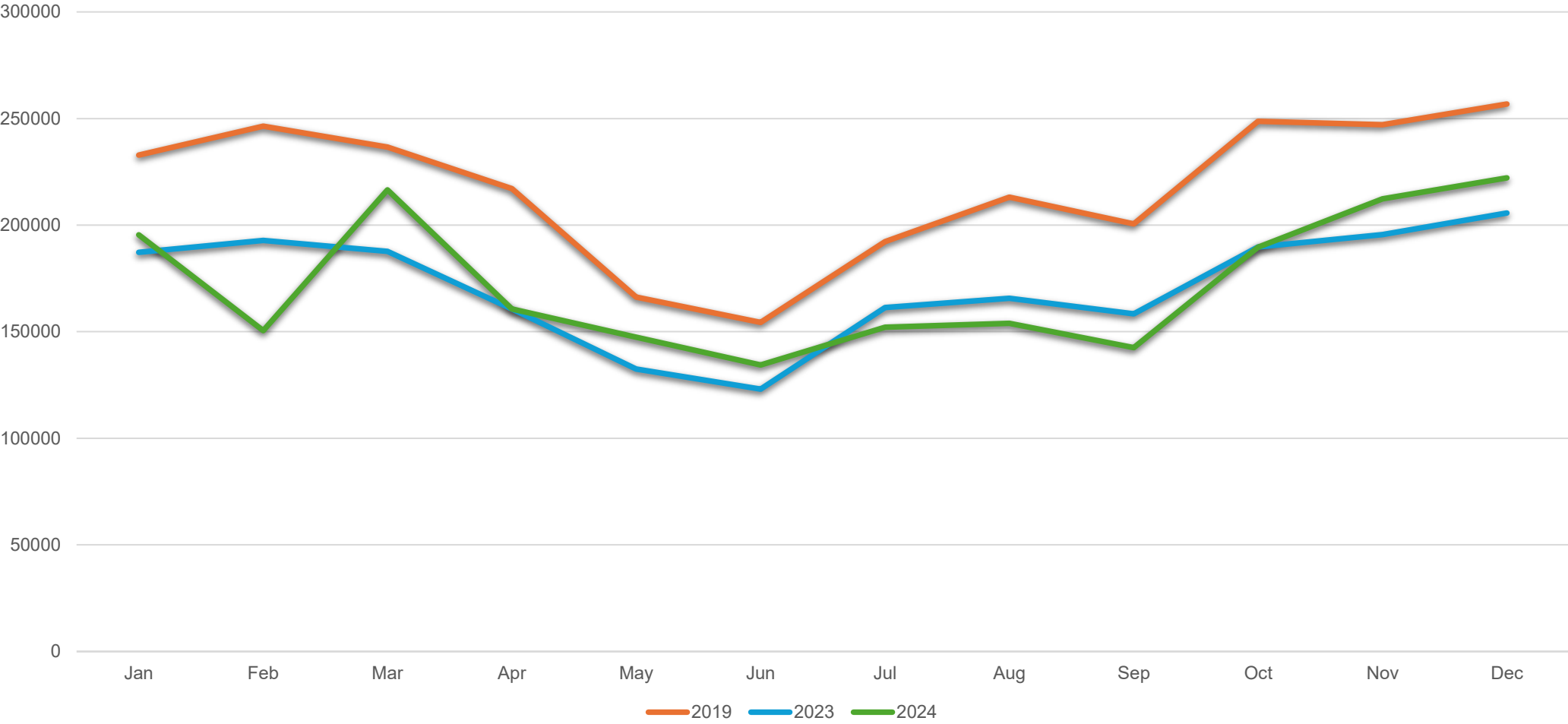
Mexico's Outbound Market

Year	USA	Canada	Spain	France	UK	Turkey	Indonesia	Australia	Italy	Egypt	Morocco
2015	18,374,000	196,000	344,000	392,000	130,000	29,000	-	9,000	156,000	-	12,000
2016	18,911,000	243,000	370,000	479,000	153,000	13,000	-	9,000	136,000	-	14,000
2017	17,788,000	386,000	451,000	547,000	196,000	18,000	11,000	11,000	139,000	10,000	18,000
2018	18,387,000	404,000	498,000	688,000	164,000	36,000	12,000	12,000	122,000	13,000	20,000
2019	18,325,000	487,000	598,000	-	166,000	64,000	14,000	13,000	155,000	20,000	24,000

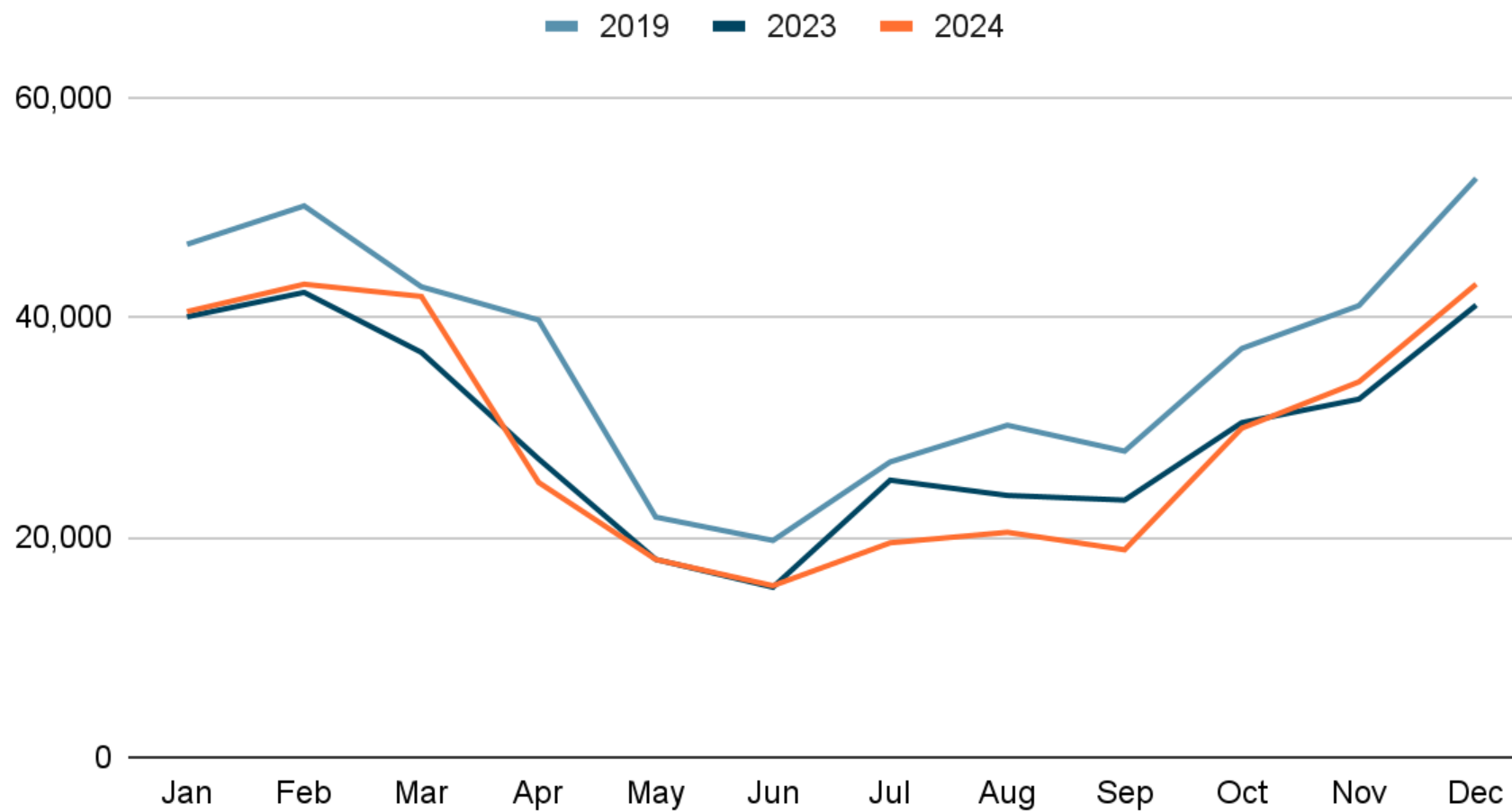
Quarterly Seasonality: 2019 vs 2023–2025



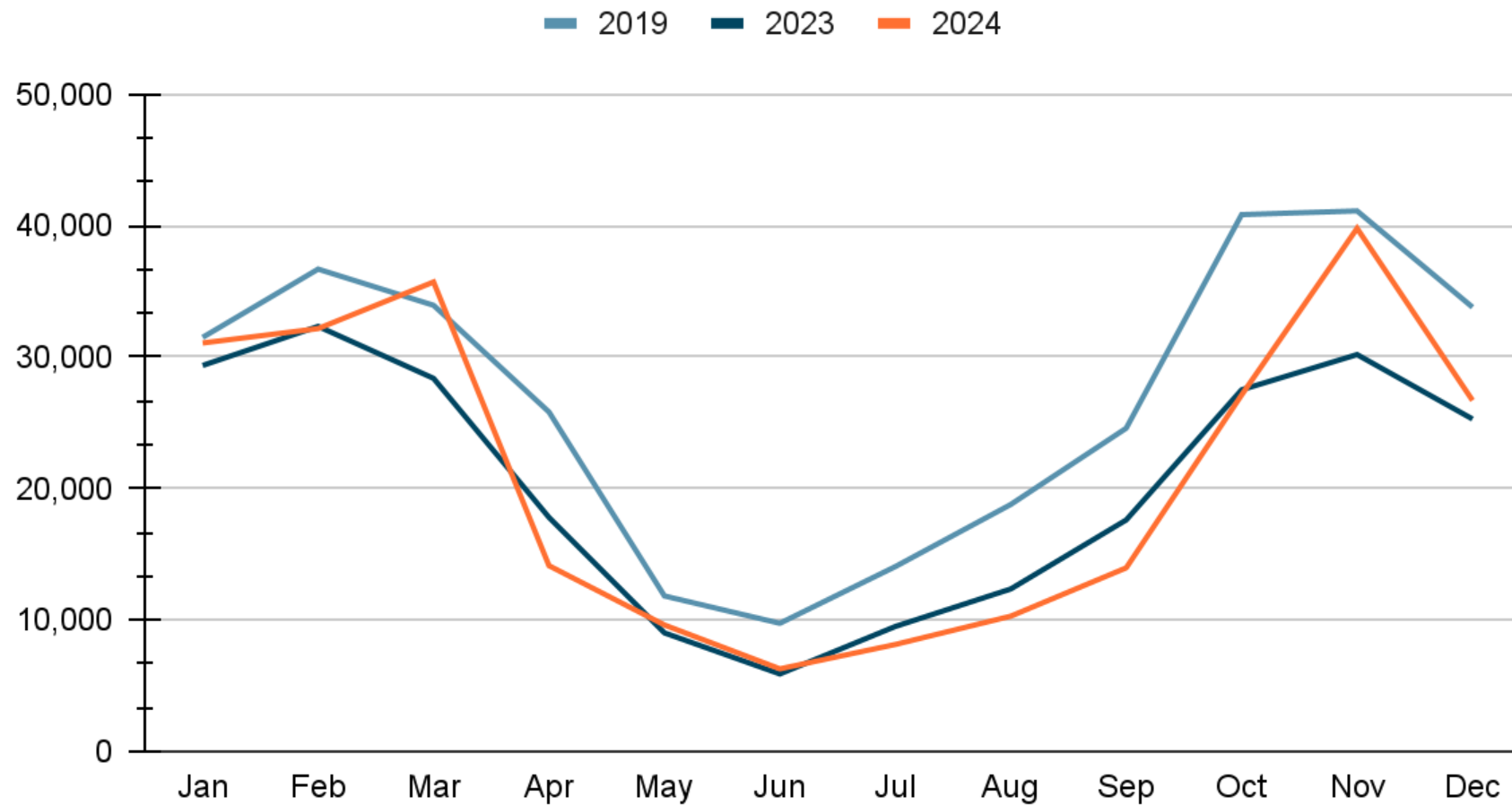
Overseas Arrivals



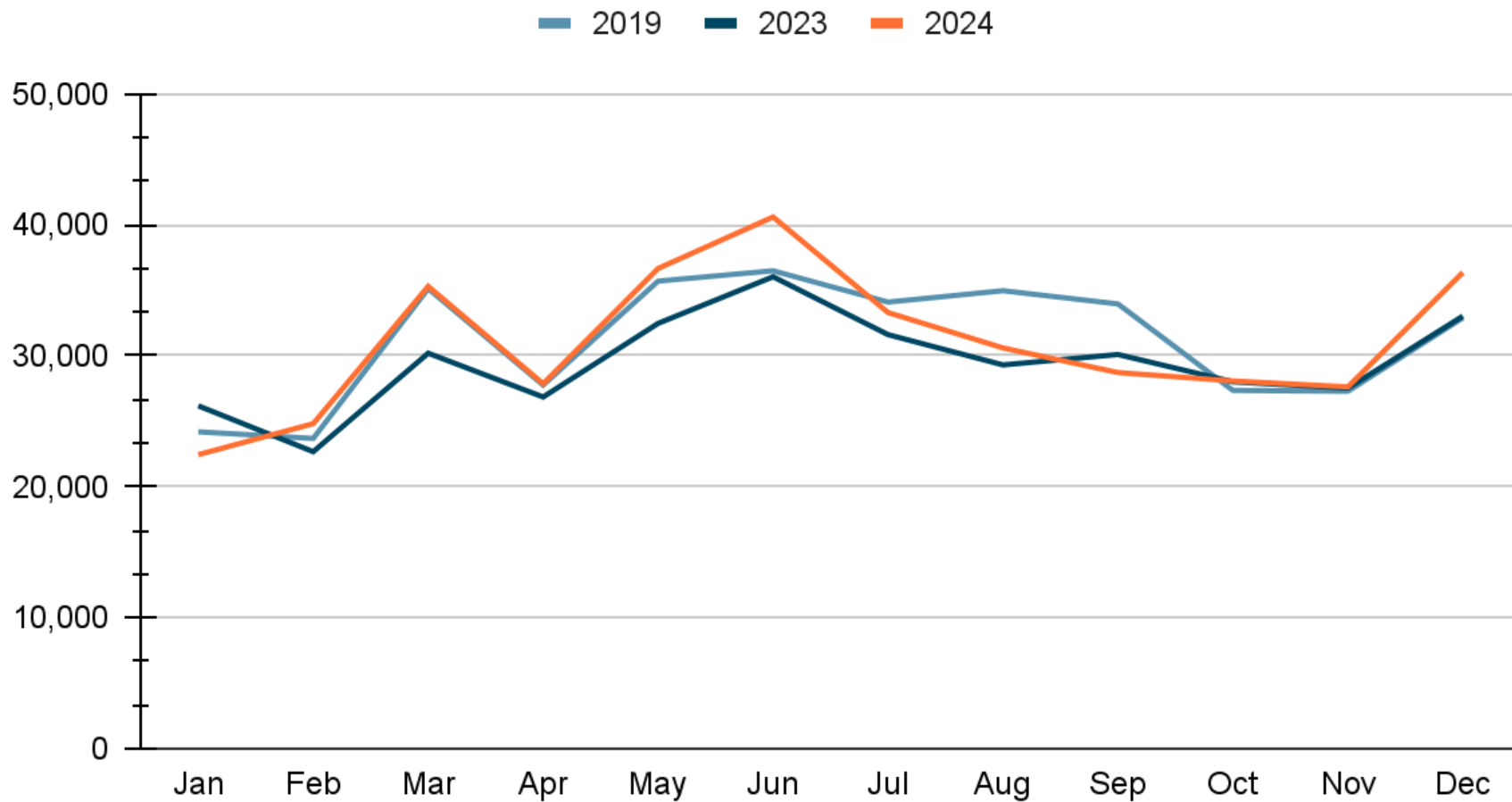
UK Seasonality



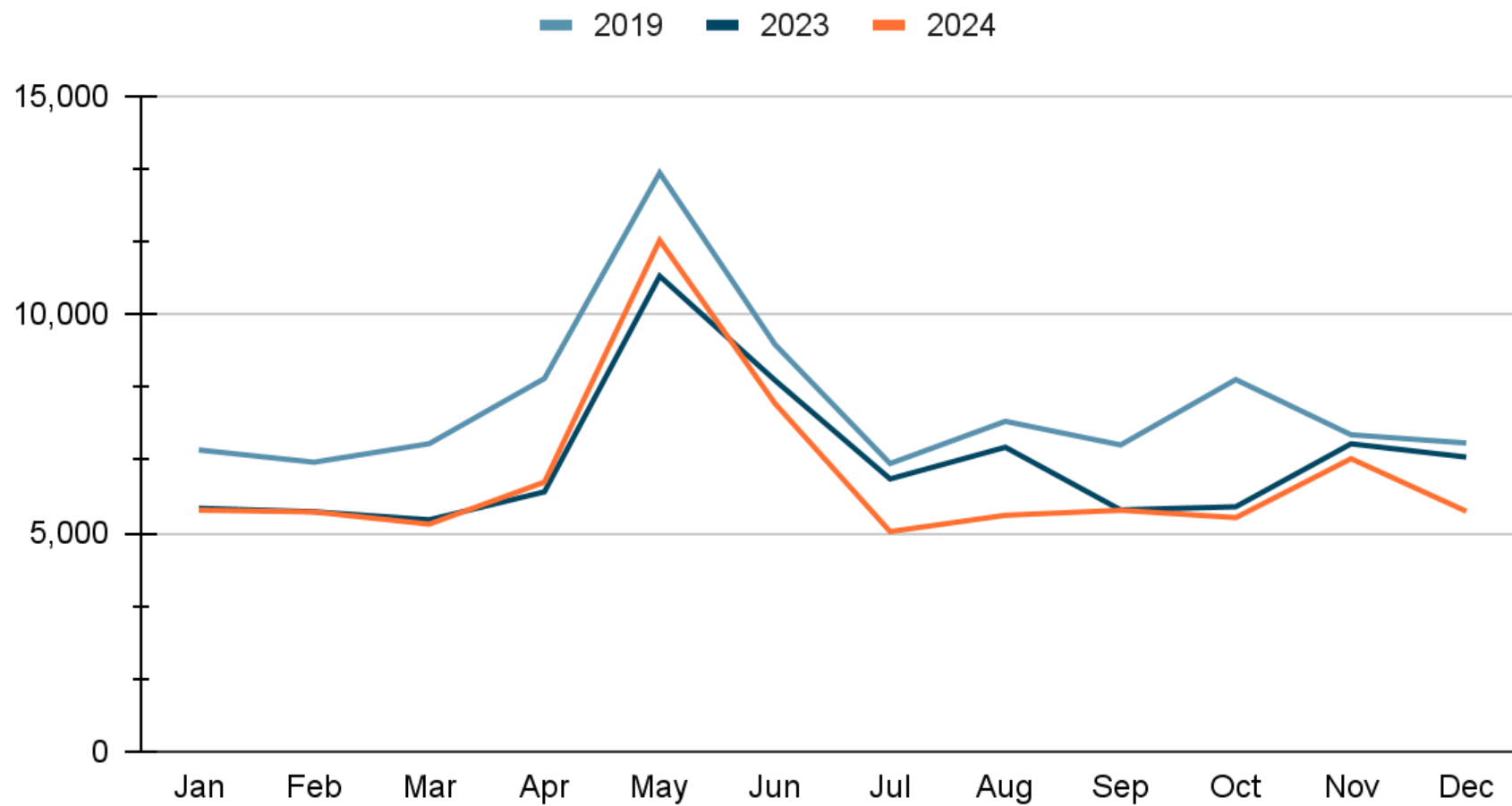
Germany Seasonality



USA Seasonality



India Seasonality



Cape Town International – Two Way Arrivals (Cape Town Air Access)							
MONTH	2019	2020	2021	2022	2023	2024	2025
January	277 759	289 789	34 953	97 950	280 430	316 481	336 258
February	241 187	257 742	17 251	125 861	258 970	294 443	299 558
March	263 889	169 130	25 563	160 547	272 955	318 366	322 555
April	205 788	46	28 233	156 933	218 325	229 567	269 264
May	162 622	0	28 970	119 729	175 079	199 450	210 146
June	171 266	0	28 854	124 783	173 398	197 346	195 672
July	172 956	0	34 335	150 338	200 952	201 732	219 594
August	179 034	0	37 109	148 366	199 262	213 289	223 657
September	187 887	59	45 622	152 843	200 190	224 044	224 437
October	211 166	18 275	71 030	175 648	237 356	250 729	287 381
November	251 621	22 907	96 528	211 944	273 281	303 202	341 114
December	281 223	52 863	76 623	270 433	317 233	331 295	363 979
TOTAL	2 606 398	810 811	525 071	1 895 375	2 807 431	3 079 944	3 293 615

Geographic Spread (Turnover)

TSC Group 2023 (3,5bn)	% Spend
Greater Kruger	47,1%
Western Cape (exclude. Garden Route)	29,3%
North West	5,3%
Eastern Cape	5,0%
Garden Route	4,0%
Gauteng	3,3%
KZN	2,7%
Rest (Limpopo, Free State & N Cape)	2,3%
Mpumalanga	0,8%

Geographic Spread (Turnover)

TDM 2024	% Spend
Western Cape	43,6%
Greater Kruger National Park	23,0%
Eastern Cape	14,0%
Mpumalanga	4,3%
Limpopo Province	4,1%
North West Province	3,8%
Gauteng	3,7%
KwaZulu Natal	2,8%
Northern Cape	0,7%
Free State	0,0%

Geographic Spread (Room Nights)

NEW FRONTIERS	2019	2022	2023	2024
Western Cape	43,0%	42,0%	44,0%	44,0%
Greater Kruger	17,0%	23,0%	22,0%	21,0%
Garden Route	9,0%	6,0%	7,0%	8,0%
Gauteng	7,0%	8,0%	8,0%	8,0%
Eastern Cape	6,0%	4,0%	5,0%	5,0%
Kwa-Zulu Natal	8,0%	7,0%	5,0%	5,0%
Limpopo	3,0%	3,0%	3,0%	3,0%
Mpumalanga	2,0%	3,0%	3,0%	3,0%
North West	3,0%	3,0%	2,0%	2,0%
Northern Cape	0,0%	0,0%	0,0%	1,0%
Other	1,0%	0,0%	0,0%	0,0%
Free State	0,0%	0,0%	0,0%	0,0%

Geographic Spread (Bed Nights)

RHINO AFRICA (2025 FY)	Bed Nights %
Greater Kruger	46,0%
Cape Town / Cape Winelands	31,0%
Garden Route	8,0%
Gauteng	5,0%
Northern Cape & West Coast	2,0%
North West Province	2,0%
Kwa-Zulu Natal	2,0%
Other	4,0%

Regional Spread (Turnover)

TDM	2019	2024
South Africa (RSA)	50,6%	35,0%
Southern Africa	24,1%	20,2%
East Africa	25,3%	44,8%

Kenya's Recovery

2019 **1,86m**

2020 **0,54m**

2021 **0,82m**

2022 **1,48m**

2023
1,96m

2024 **2.5m**

2025 (Jan-May) **922,961**

Recovery 2019 vs 2023

105,38%

Recovery 2019 vs 2024

134,41%

- In 2023, Kenya attracted tourists from diverse source markets, including the *United States*, *Uganda*, *Tanzania*, the *United Kingdom*, and *India*.
- The Kenyan government, in collaboration with industry stakeholders, unveiled a New Tourism Strategy for Kenya 2021-2025.
- Kenya has embraced digital visas and has launched a remote working visa, as well as an ETA (electronic travel authorisation). Kenya has since dropped ETA requirements for most African countries.
- Tourism remains a cornerstone of Kenya's economy, contributing 7% to the GDP and injecting Ksh 1.05 trillion into the economy last year (2023) (WTTC).
- In the first half of the year (2024) the sector generated Sh142.5 billion in revenue, an increase from \$1.06 billion in the same period last year, according to the Kenya Tourism Board (KTB)
- Target of 7 million tourist arrivals by the year 2027.

Tanzania's Recovery

2019	1,510,151
2020	616,491
2021	922,692
2022	1,454,920
2023	1,808,205
2024	2,140,000
2025 (Jan-May)	794,102

- The sector's contribution to GDP fell from 10.6% in 2019 to 5.3% in 2020 and climbed to 5.7% in 2021.
- Travel (tourism) receipts amounted to USD 3,581.2 million in the year ending March 2024, up by 28.4% from USD 2,788.3 million in the previous year
- The Tanzania National Business Council (TNBC) forecast that the share of tourism in the country's GDP will reach 19.5% in 2025/26.
- Europe traditionally accounts for the largest share of arrivals, followed by Asia and the Pacific, the Americas, Africa, and the Middle East.
- According to World Tourism Barometer Report, in Africa, Tanzania has led the surge in tourism arrivals with a 49% increase in January-July 2024 compared to the same period in 2019 (pre-Covid).
- Arrivals for the period January through May 2025 is the highest recorded, since the same period in 2015. 54,3% higher than the same period in 2019 and a 3,7% increase on the same period for prior year (2024).

Recovery 2019 vs 2023

119,74%

Recovery 2019 vs 2024

141,72%

Recovery (Jan-May, '19 vs '25)

154,3%