

State of Tourism in Southern Africa

*Recovery, Growth, Regional & Geographical
Spread*

Overseas Arrivals to South Africa (2000 – 2024)

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%

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

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

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%

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 (Room Nights & Turnover)

ROYAL AFRICAN DISCOVERIES (2024)	Room Nights	% Spend
Western Cape	50,1%	42,2%
Garden Route	15,3%	7,6%
Eastern Cape	1,7%	2,5%
Gauteng	8,6%	4,8%
Limpopo Province	2,2%	3,2%
North West Province	12,2%	16,2%
Mpumalanga	6,9%	4,6%
Greater Kruger	3,0%	18,9%
KwaZulu Natal & Rest	0,2%	0,1%

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%

Geographic Spread (Bed Nights)

GO2AFRICA	2019	2024
Kruger	20,0%	39,0%
Cape Town	21,0%	33,0%
Johannesburg	5,0%	8,0%
Cape Winelands	3,0%	5,0%
Madikwe	2,0%	3,0%
Eastern Cape	2,0%	2,0%
Kwa-Zulu Natal	3,0%	2,0%
Garden Route	3,0%	2,0%
Whale Coast	1,0%	2,0%
Panorama Route	1,0%	1,0%
Sun City	35,0%	1,0%
Rest	3,0%	2,0%

Regional Spread (Turnover)

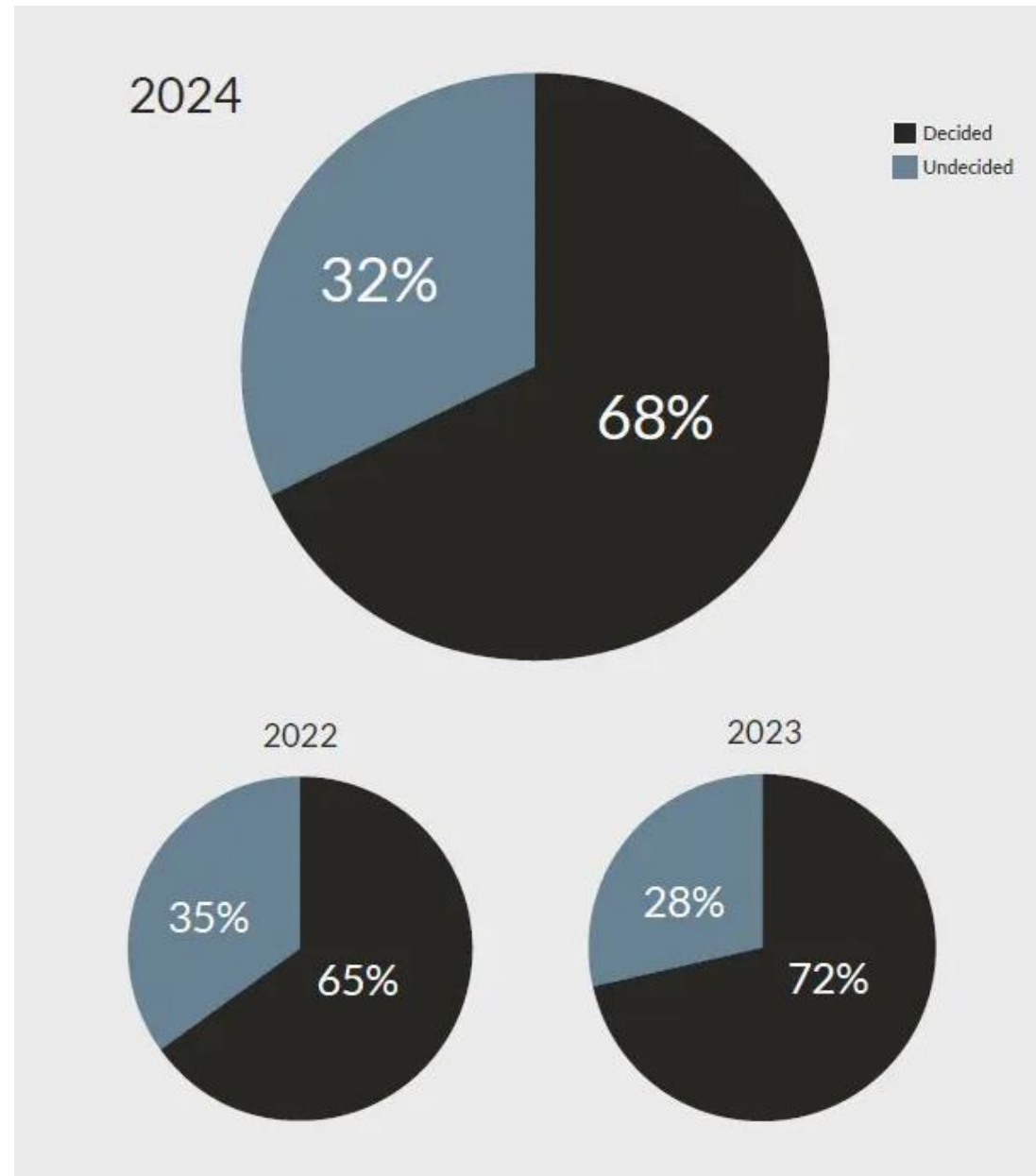
TDM	2019	2024
South Africa (RSA)	50,6%	35,0%
Southern Africa	24,1%	20,2%
East Africa	25,3%	44,8%

Regional Spread (Bed Nights)

GO2AFRICA	2019	2024
South Africa	55,0%	36,0%
Tanzania	12,0%	18,0%
Kenya	10,0%	15,0%
Botswana	7,0%	10,0%
Zimbabwe	5,0%	8,0%
Namibia	2,0%	4,0%
Rest of Africa	9,0%	10,0%

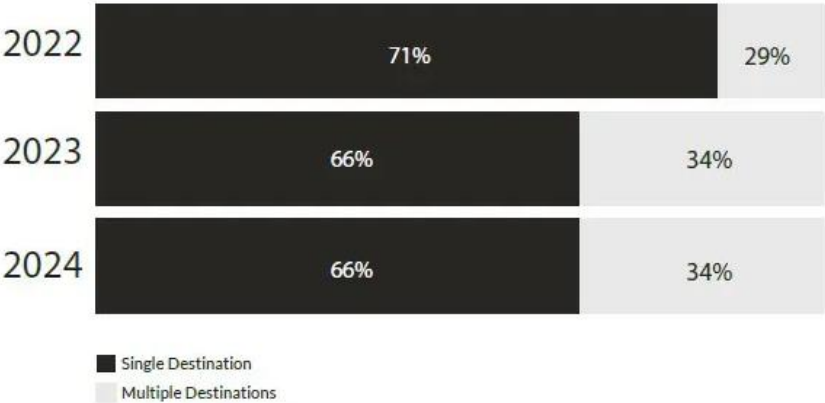
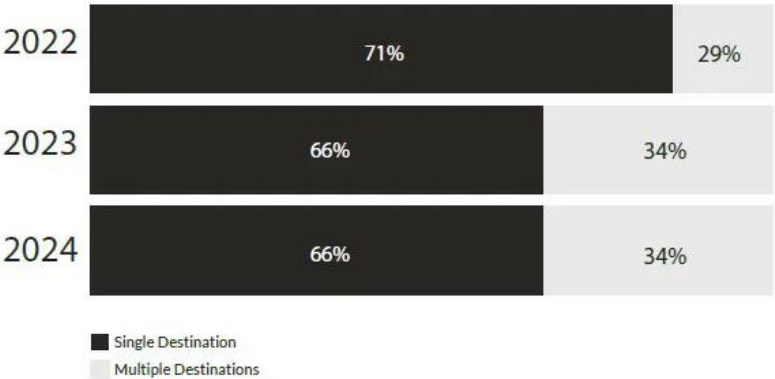
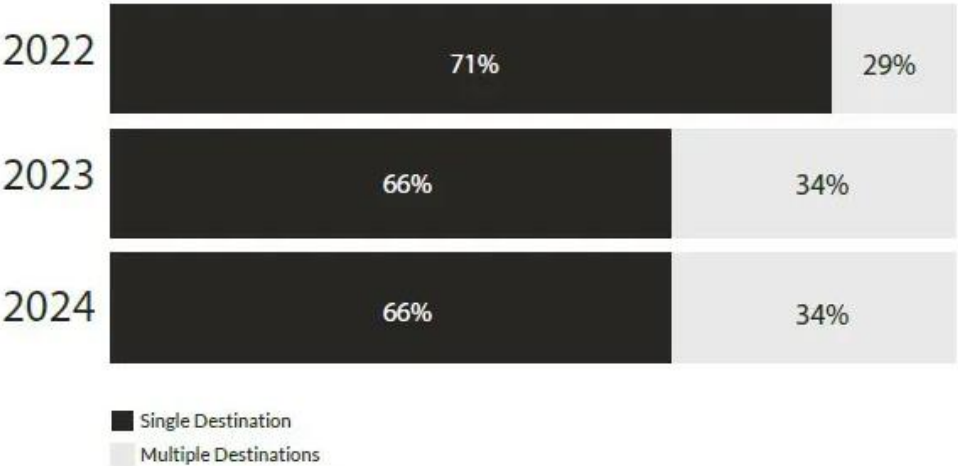
Courtesy of
www.go2africa.com

Where Are People Going on Safari in Africa?



Are People travelling to Single or Multiple Countries in Africa?

Courtesy of
www.go2africa.com



Kenya's Recovery

Year	Total tourist arrivals
2019	1,86m
2020	0,54m
2021	0,82m
2022	1,48m
2023	1,96m
2024	2.5m
Recovery 2019 vs 2023	105,38%
Recovery 2019 vs 2024	134,41%

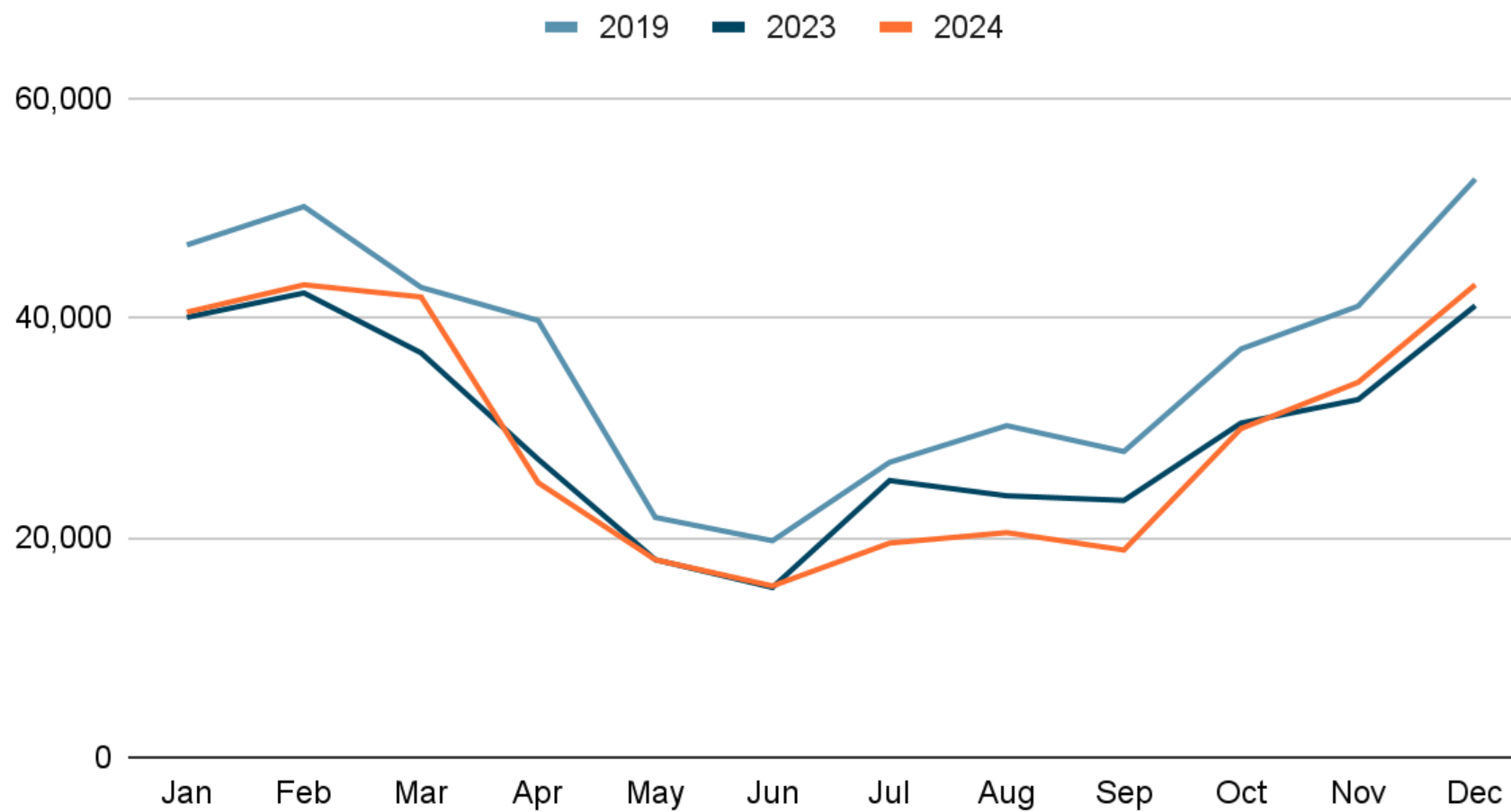
- In 2023, Kenya attracted tourists from diverse source markets, including the *United States*, *Uganda*, *Tanzania*, the *United Kingdom*, and *India*.
- The Kenyan government, in collaboration with industry stakeholders, unveiled a New Tourism Strategy for Kenya 2021-2025.
- Kenya has embraced digital 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

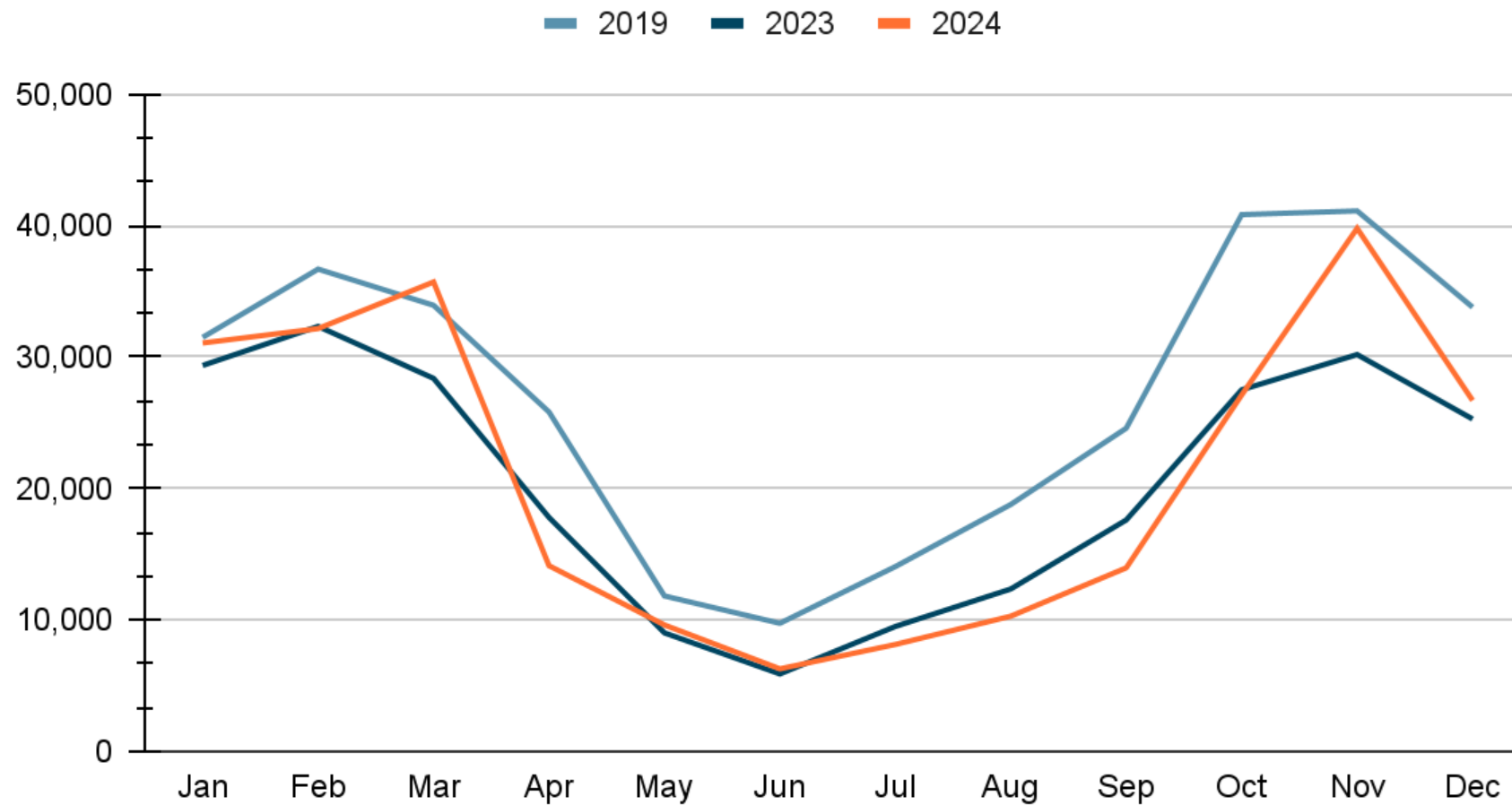
Year	Total tourist arrivals
2019	1,510,151
2020	616,491
2021	922,692
2022	1,454,920
2023	1,808,205
2024	2,140,000
Recovery 2019 vs 2023	119,74%
Recovery 2019 vs 2024	141,72%

- 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).

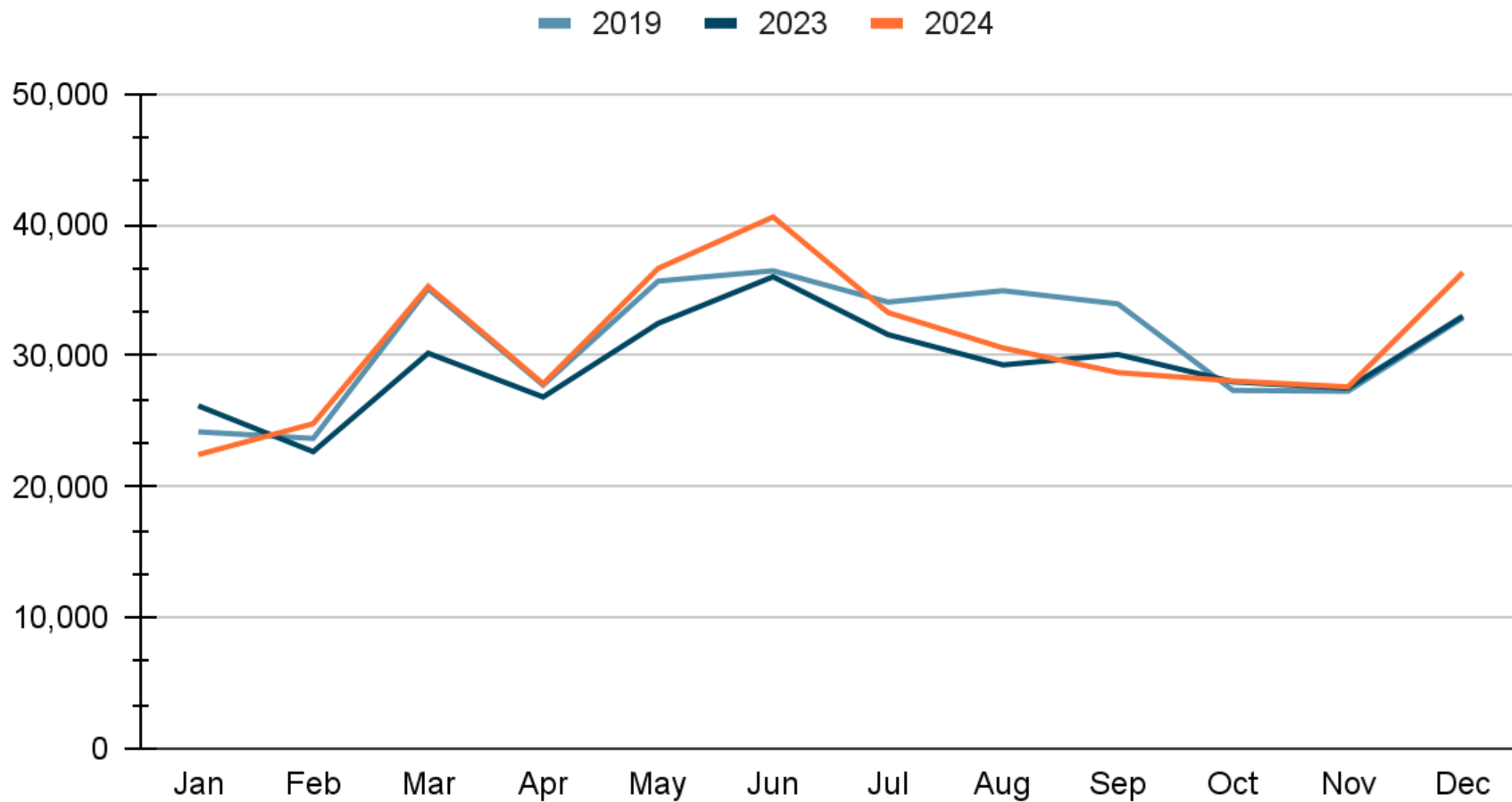
UK Seasonality



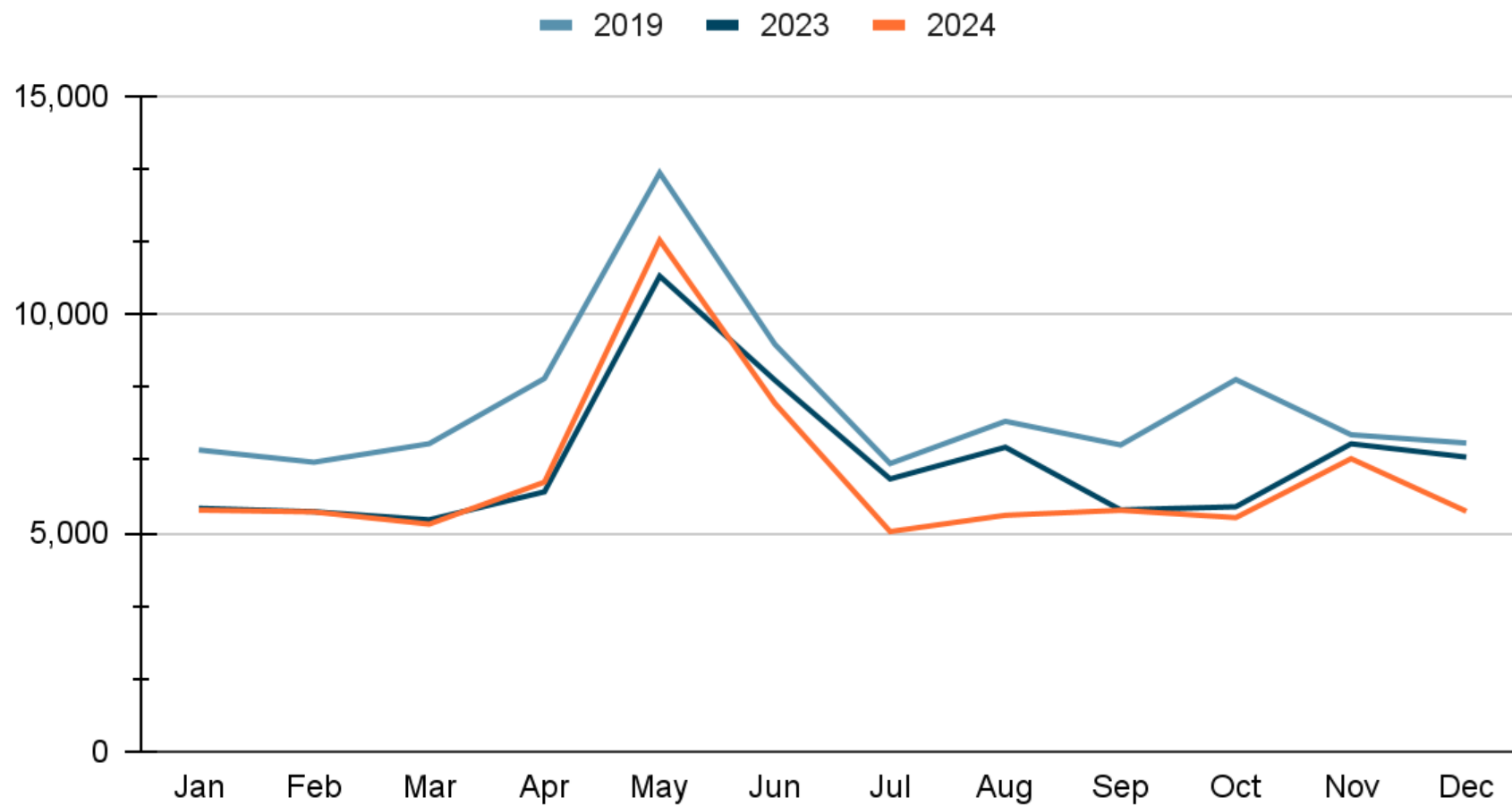
Germany Seasonality



USA Seasonality



India Seasonality





For any questions on these
slides, please contact
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