



South Africa

Inbound Recovery

Hospitality Industry Think Tank 2025

SATSA ▶
The Voice of Inbound Tourism

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	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 (Jan-June)

Year	USA	UK	Germany	France	Netherlands	Australia	Canada	India	Italy	Brazil	China	Scandinavia
2019	183 134	220 830	149 531	80 228	58 463	52 279	32 900	51 649	25 619	34 112	46 281	
2023	174 403	179 693	122 797	56 413	54 083	41 620	26 983	41 668	18 680	9 118	16 215	
2024	187 691	183 995	128 987	62 838	58 909	45 562	28 864	42 033	19 991	23 969	20 640	
2025	190 537	199 334	133 151	62 923	60 319	53 460	30 768	37 447	21 546	27 775	20 339	
% Recovery 2019 vs 2025	104%	90,3%	89%	78,4%	103,2%	102,3%	93,5%	72,5%	84,1%	81,4%	44%	

**Scandinavia = Sweden, Norway, Finland, Denmark (estimated)*

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-Jun)

Region	2019	2023	2024	2025	Recovery 2019 vs 2025
Overseas Arrivals	1 253 632	983 814	1 064 063	1 113 746	88,84%

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

Overseas Arrivals	Recovery (2019 vs 2025)
2023 YE	79%
2024 YE	82%
2025 (Jan-Jun)	88,84%

China & India Arrivals (Mar-May)

Source Market	March - Jun 2019	March - Jun 2024	Difference ('19 vs '24)	March - Jun 2025	Difference ('19 vs '25)
China	28 371	14 041	49,5%	13 295	48,9%
India	38 220	31 027	81,2%	25 554	66,9%

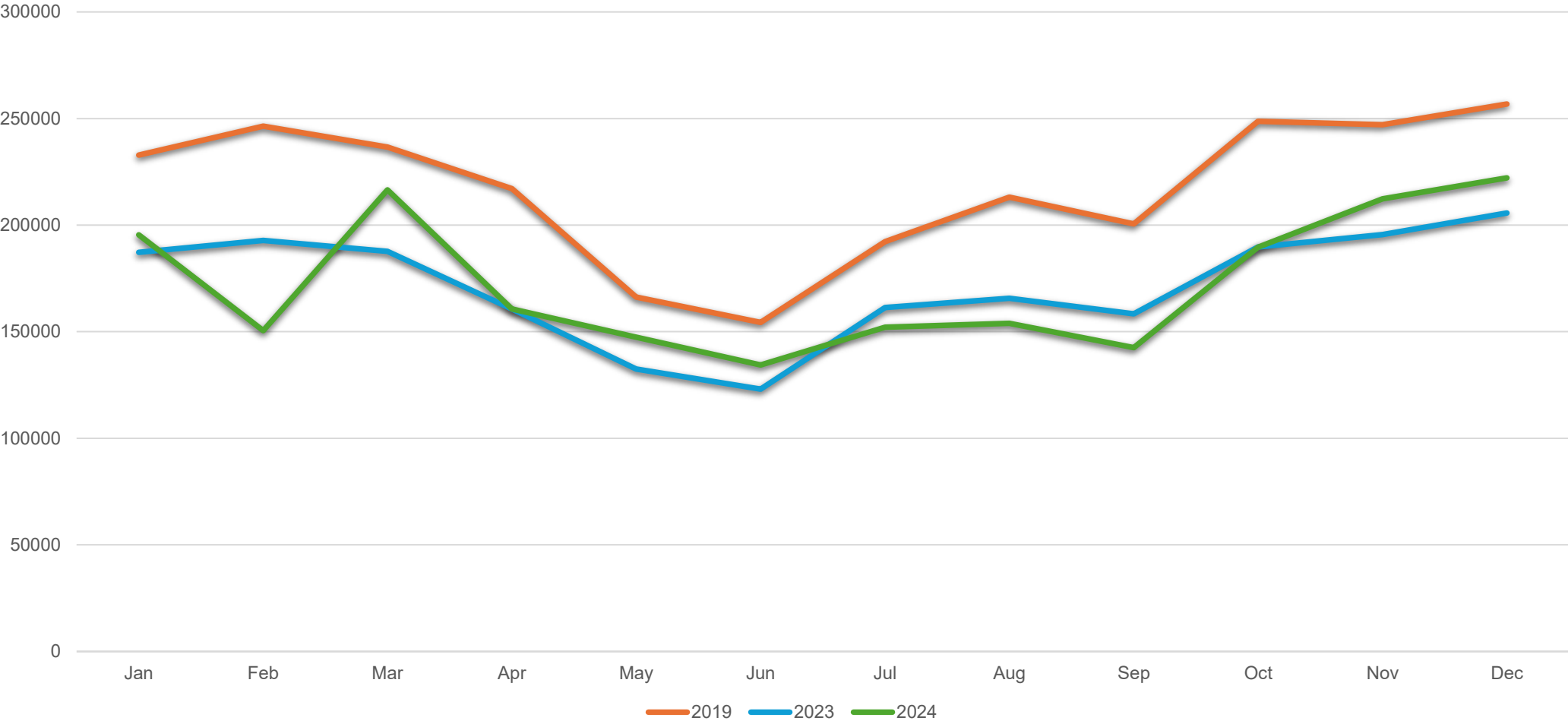
China	2019	2024	2025
March	7 679	4 340	4 150
April	6 712	3 006	2 717
May	7 259	3 196	3 431
June	6 721	3 499	2 997

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

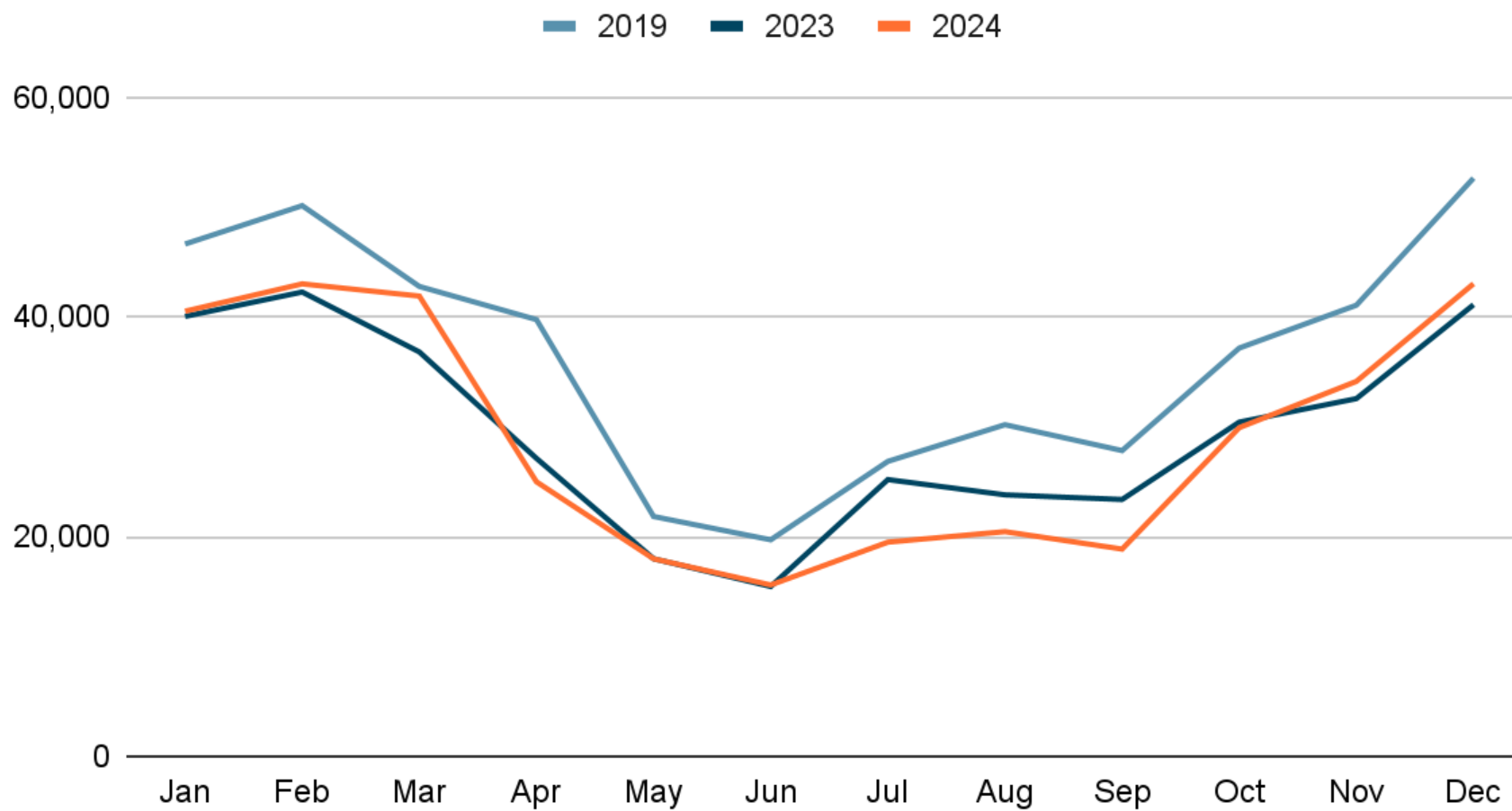
Mexico's Outbound Market

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

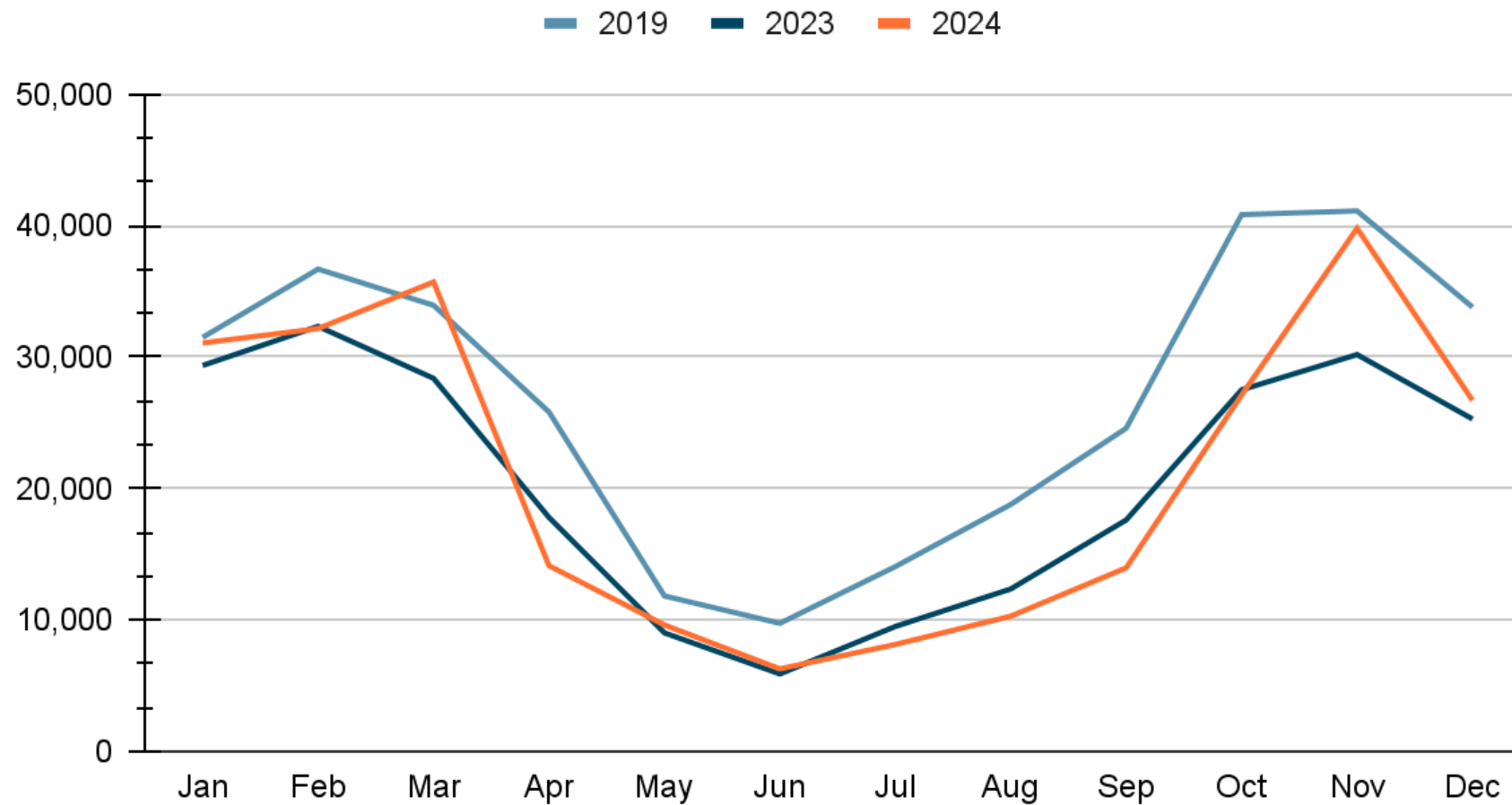
Overseas Arrivals



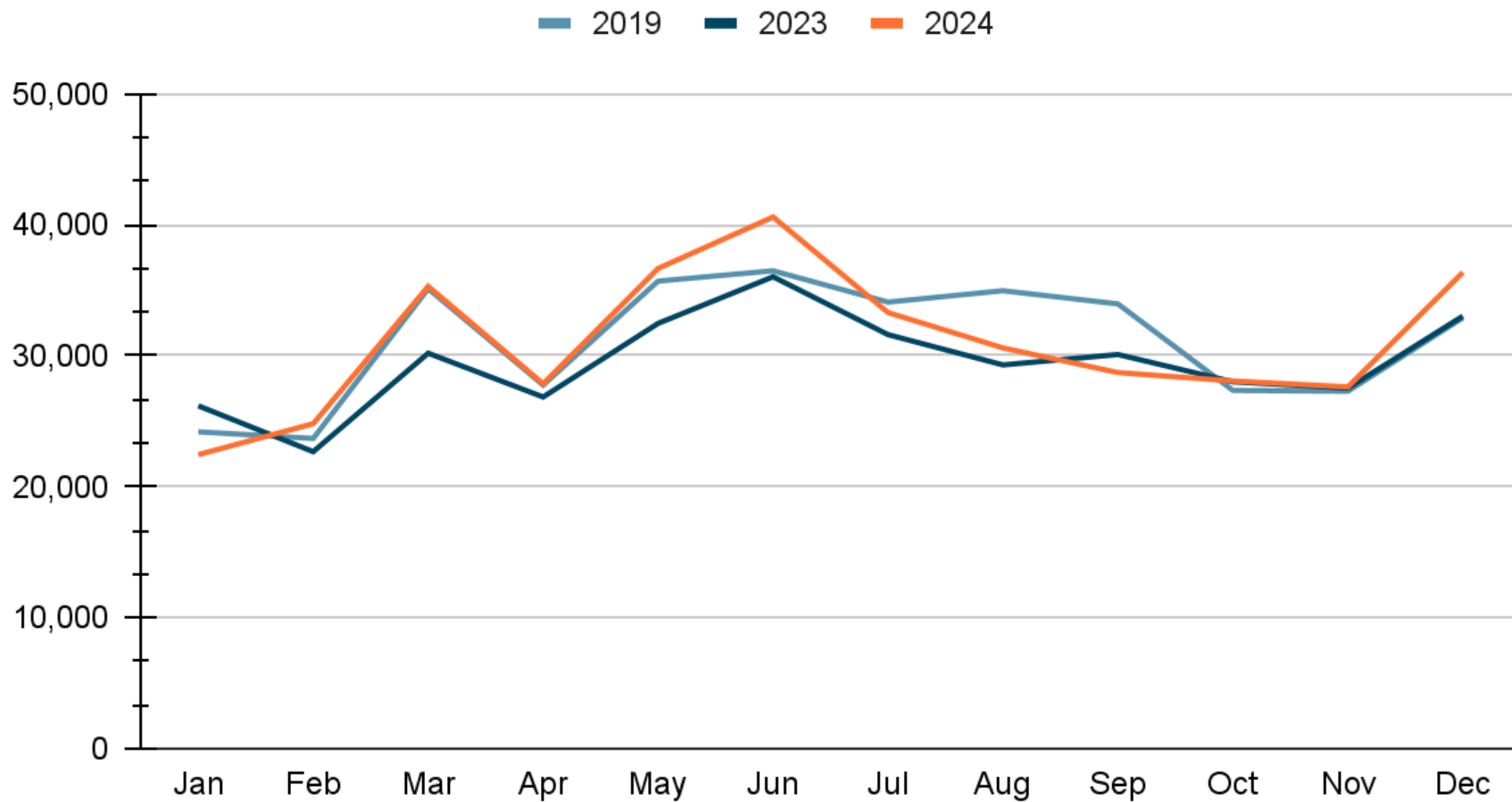
UK Seasonality



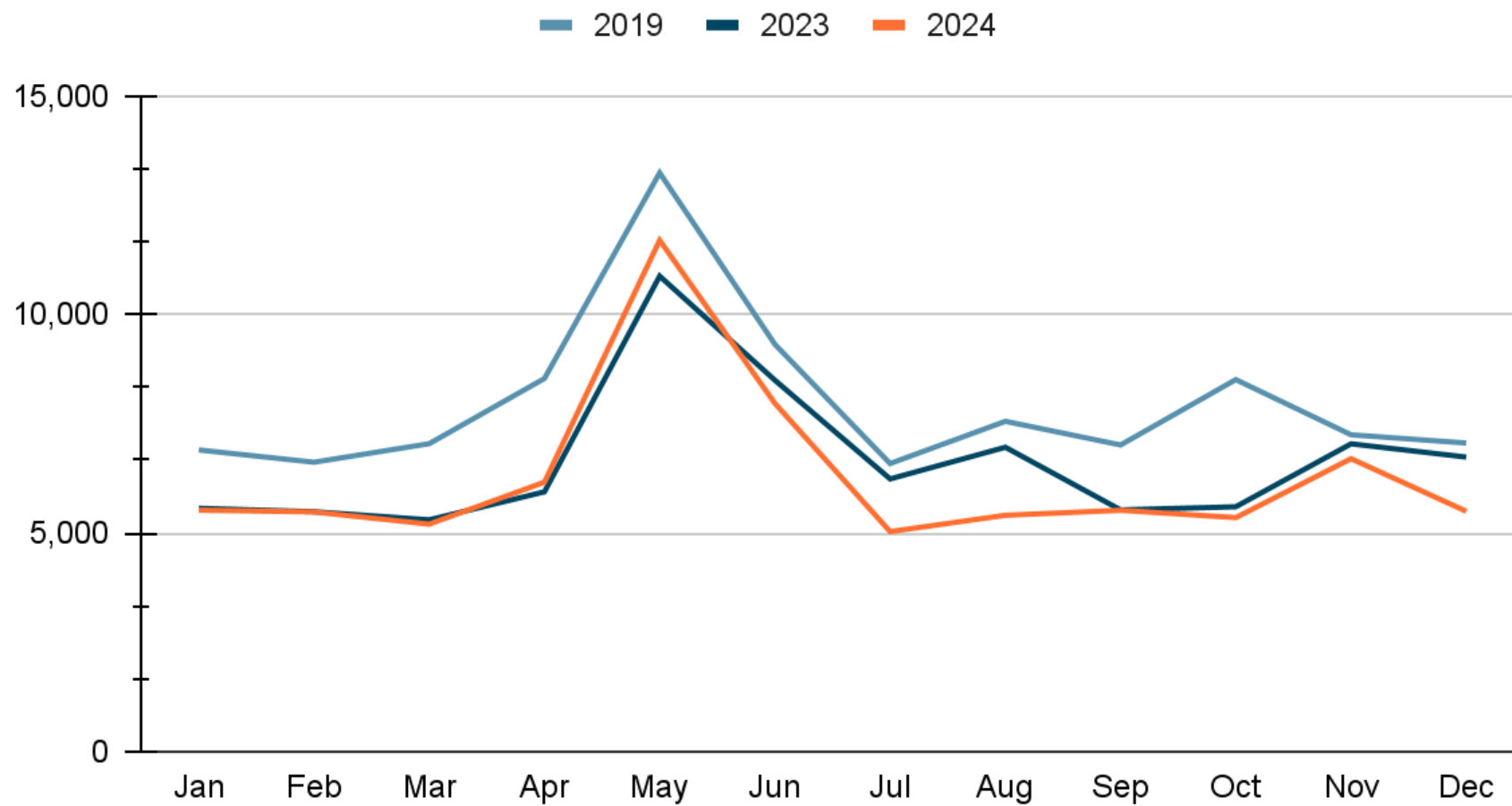
Germany Seasonality



USA Seasonality



India Seasonality



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

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).