BI-ANNUAL

TOURISM PERFORMANCE REPORT

JULY - DECEMBER 2024




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LIST OF ABBREVIATIONS

ACSA	Airports Company South Africa
ASK	Available Seat Kilometre
COVID-19	Coronavirus
CTIA	Cape Town International Airport
GDP	Gross Domestic Product
IATA	International Air Transport Association
MICE	Meetings, Incentives, Conferences and Exhibitions
PLF	Passenger Load Factor
RPK	Revenue Passenger Kilometres
QLFS	Quarterly Labour Force Survey
SANCB	South African National Conventions Bureau
STATS SA	Statistics South Africa
STR	Smith Travel Research
TSA	Tourism Satellite Account
UN TOURISM	United Nations World Tourism Organisation
WTTC	World Travel and Tourism Council

LIST OF DEFINITIONS

Concept	Definition
ADR (Average Daily Rate)	Room revenue/rooms sold: i.e., a measure of the average rate paid for rooms sold is calculated by dividing room revenue by rooms sold.
Available Seat-Kilometres (ASK)	The number of seats carriers have available multiplied by the number of kilometres flown. The ratio of revenue passenger kilometres.
Country of Residence	The country of residence of a household is determined according to the centre of predominant economic interest of its members. If a person resides (or intends to reside) for more than one year in a given country and has there his/her centre of economic interest (for example, where the predominant amount of time is spent), he/she is considered as a resident of this country.
Destination (main destination of a trip)	The main destination of a tourism trip is defined as the place visited that is central to the decision to take the trip.
Domestic Day Trips	A trip outside of the respondent's usual environment, where they leave and return within the same day (i.e., do not stay overnight).
Domestic Overnights	A visitor/tourist who stays at least one night in collective or private accommodation in the place visited.
Domestic Tourism	The tourism of resident visitors within the economic territory of the country of reference.
Inbound Tourism	Which comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.
Industry	Group of establishments engaged in the same or similar kinds of activity.
International Tourism	The combination of inbound tourism and outbound tourism.
Occupancy	Rooms sold/rooms available: the percentage of available rooms that were sold during a specified period of time. Occupancy is calculated by dividing the number of rooms sold by the number of rooms available.

Outbound Tourism	Comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip.
Passenger Load Factor	The ratio of revenue passenger kilometres (RPK) to available seat-kilometres (ASK) is called passenger load factor: i.e., the percentage of capacity used.
Purpose of Visit	The major groups that are recommended for classifying the main purpose of visit (or trip) are: leisure, recreation and holidays; visiting friends and relatives; business and professional reasons; health treatment; religion/pilgrimages and other.
Region	An area, especially part of a country or the world, having definable characteristics but not always fixed boundaries.
Revenue Passenger-Kilometres (RPK)	RPK represents one paying passenger transported over one kilometre, so the number of passengers is multiplied by the distance flown. This means that each long-haul passenger contributes more to total traffic measured in RPKs than each short-haul passenger does.
RevPAR (Revenue per available room)	Room revenue/rooms available (or = occupancy x ADR): the total guest room revenue divided by the total number of available rooms.
Total foreign direct spend in South Africa (TFDS)	The total amount spent directly in South Africa by all foreign tourists including amounts spent on goods for resale and capital investments.
Tourism Demand	Is the sum of tourism consumption, tourism collective consumption and tourism gross fixed capital formation?
Tourism Employment	An activity in which a person performs work for pay, profit or family gain. Such a person can be self-employed, an employer, an employee or a working family member.
Tourism Gross Domestic Product	Tourism GDP is the GDP generated in the economy by the tourism industries and other industries in response to tourism internal consumption.
Tourism Sector	The tourism sector consists of the set of institutional units whose principal economic activity is a tourism-characteristic activity. These units might belong to the following institutional sectors: households; non-financial corporations (private, foreign owned,

	publicly owned); financial corporations; general government or non-profit institutions serving households.
Tourist	A visitor who stays at least one night in the place visited.
Traveller	A traveller is any person on a trip between two or more countries, or between two or more localities within his/her country of usual residence.
Usual Environment	To be outside the 'usual environment' the person should travel more than 40 kilometres from his/her place of residence (one way) AND the place should NOT be visited more than once a week. This includes place of work and place of study. Leisure and recreational trips are included irrespective of frequency.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months, and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited.

Note: Source for the definitions: UN Tourism and Statistics South Africa

INTRODUCTION AND BACKGROUND

The tourism sector has played a critical role in the global economy and in many countries across the world by creating jobs, and contributing to investment growth and small business development. The spread of the Coronavirus (COVID-19) pandemic in early 2020 created a global crisis. The tourism sector was one of the most vulnerable sectors of the economy and the impact could be seen in most of the tourism-related industries that are operating within the tourism value chain at a global and national level (UN Tourism, 2022). The Department of Tourism's Tourism Master Plan highlights tourism as a vital sector in South Africa’s economy, given its capacity to generate substantial employment, especially for women and youth. The sector’s labour-intensive characteristics, powerful multiplier effect, and wide-reaching supply chain create numerous job opportunities, particularly benefiting Small, Micro, and Medium Enterprises (SMMEs) (Department of Tourism, 2023). To monitor the performance of the tourism sector and its recovery from COVID-19, bi-annual tourism reports have been developed by the Department of Tourism.

The aim of the Bi-annual Tourism Performance Report is to provide a performance overview of the tourism sector at a global and national level focusing on the performance of inbound tourism and tourism-related industries namely; accommodation, food and beverages, and aviation for a period of six months. The bi-annual report also provides an overview of the tourism sector’s recovery from COVID-19 through the analysis of key indicators that are used to monitor the performance of the tourism sector. To achieve this, secondary data has been sourced and analysed to develop a comprehensive bi-annual performance report for the sector. In September 2024, the bi-annual report for January-June 2024 period compared to January-June 2023 was developed. This current report focuses on the tourism sector's performance for July-December 2024 period, compared to the same period in 2023. Additionally, the report presents the annual tourism performance for key indicators in 2024.

PERFORMANCE OVERVIEW: 2024

This section highlights the key performance of the tourism sector at global and national level during the period 2024. Latest statistics from UN Tourism indicates that an estimated 1 445 million international tourists were recorded globally in 2024, which is an increase of 10,7% compared to 2023 (UN Tourism, January Barometer, 2025). Global tourist arrivals reported during 2024 was at -1,3% level of tourist arrivals recorded in 2019, during pre-COVID period. The statistics further shows that global tourist arrival performance for Quarter four of 2024 was the strongest, with tourist arrivals exceeding pre-pandemic levels in this period, and demonstrating a 1,6% increase compared to Quarter four of 2019, pre-COVID period. The performances of the regions indicate that the Middle East, Europe and Africa were the highest compared to other regions. According to UN Tourism (2025), international tourist arrivals are expected to grow between 3% to 5% in 2025 compared to 2024. This projection assumes that global economic conditions remain favourable, inflation continues to recede, and geopolitical conflicts do not escalate (UN Tourism, 2025).

Recovery from COVID-19 for key tourism-related industries namely aviation and accommodation are also evident during 2024 compared to 2023. According to IATA, total full-year traffic in 2024, which is measured in revenue passenger kilometres (RPK), increased by 10,4% compared to 2023. This was 3,8% above pre-COVID pandemic levels (IATA, 2025). The strongest month for aviation was December 2024, with load factor reaching 84%. Total capacity, measured in available seat kilometres (ASK), increased by 8,7% in 2024 compared to 2023. Total international RPK surpassed 2019 levels by 0,5% in 2024 and total industry domestic RPK increased by 9,7% over 2019 levels.

> *According to Willie Walsh, IATA's Director-General "2024 made it absolutely clear that people want to travel. Aviation growth reverberates across societies and economies at all levels through jobs, market development, trade, innovation, exploration, and much more," (Source. IATA, 2025).*

Global occupancy rates in hotels improved from 60% in December 2023 to 61% in December 2024 (STR, 2025). The Middle East (70%) recorded the highest occupancy in December 2024, followed by Asia Pacific (63%) and Europe (61%). More details on the annual performance analysis for global tourist arrivals, aviation and accommodation can be found in Chapter 5 of the Annual Tourism Performance report.

At a national level, total tourist arrivals went up by 5,1% (436 037) during January-December 2024 compared to the same period in 2023. However, tourist arrivals during January to December 2024 were at a level of -12,8% compared to tourist arrivals recorded in the pre-COVID 19 period (Jan-Dec 2019). The last six months of 2024 contributed 50,2% to total tourist arrivals in South Africa for 2024. Key specific developments that occurred during July-December 2024 for the different tourism-related industries noteworthy to highlight include:

- Several of the country's boutique hotels were amongst the top winners for the Boutique Hotel Club Awards, which were announced in October 2024. The Boutique Hotel Club Awards are the ultimate recognition for the world's most exceptional boutique hotels. This prestigious international event honours the finest independently-owned properties that provide unique, intimate, and unforgettable experiences for their guests. The three outstanding properties honoured at the 2024 Awards were Akademie Street Boutique Hotel, Lekkerwater Beach Lodge and Vergenoegd Löw Boutique Hotel & Spa. South Africa's recent wins at the Boutique Hotel Club Awards highlight the country's growing tourism sector, enhancing its global reputation and attracting more tourists to explore its diverse attractions. (Glamour, 2024).
- Airports Company South Africa (ACSA) announced new flight routes and additional services at several of its airports, offering passengers improved connectivity to their destinations. Some of the new routes include; Air Botswana that launched, for the first time, a flight between Gaborone and Durban, with a direct flight to King Shaka International Airport. The airline operates three times a week, on Wednesdays, Fridays, and Sundays. From 1st November 2024, British Airways had increased flight frequency between Cape Town International Airport (CTIA)

and Heathrow; Norse Atlantic Airways also introduced a new affordable service between London Gatwick and CTIA. The airline has been operating seasonally with three weekly flights, which started from 28 October 2024. FlySafair also launched its first international route between Cape Town and Hosea Kutako International Airport in Windhoek, Namibia in October 2024. The improved access to destinations allows for tourists to travel with ease to and from South Africa. (Bizcommunity, 2024).

- The South African government had approved a new tourism White Paper in 2024, which aims to modernise the country's approach to tourism development. The revised policy responds to significant changes in the sector over nearly three decades, with particular focus on digital innovation, competitiveness and inclusion. It addresses key challenges including safety and security, access improvements and crisis management (African Travel and Tourism Association, 2024).
- Since the start of the 2024/25 financial year, the South African National Conventions Bureau (SANCB) had made progress in securing international business events, further establishing the country as a top destination for global conferences and conventions. The SANCB and South Africa's business events industry has submitted 63 bids for international events set to take place between 2024 and 2029. As of October 2024, South Africa had won 26 of the bids submitted during 2024/25 financial year. It is estimated that the secured bids would contribute close to R243 million to South Africa’s economy between 2024 and 2029 and attract 10 390 international and regional delegates. (Tourism Update, 2024).
- Plans for the Cape Winelands Airport, a £300 million project set to open by 2027, was announced in September 2024. The expanded airport aims to carter up to 5 million passengers, including 2 million international travellers by 2050, boosting tourism infrastructure and accessibility (The Sun, 2024).

These are some of the achievements that could have contributed to South Africa’s tourism performance in 2024. It is important to note that there could be other developments that have not been included in this report, which could also have an impact on tourism performance. There have also been recent political tensions between South Africa and the USA, and the potential impact these tensions could have on the tourism sector is discussed in Chapter 6: Annual Tourism Performance.

INDICATORS REPORTED IN THE BI-ANNUAL TOURISM REPORT

The bi-annual report primarily uses secondary data to report on tourism performance at a global and national level. The data was sourced from official and reliable tourism statistics providers that are indicated in the different sections of the report. Reporting on the performance of the tourism sector is therefore dependent on the availability of secondary data from key official and reliable sources. The table below indicates the period of data available for the key indicators reported in this bi-annual report.

Table 1: Reporting Period of Key Indicators Reported on the Bi-Annual Report: July-December 2024

CHAPTER	INDICATORS	PERIOD REPORTED
1: Global Tourism Performance	• Global Tourist Arrivals • Global Tourist Arrivals by Region	Q3-Q4 2024 compared to Q3-Q4 2023 and Q3-Q4 2019
2: Global Tourism Related Industry Performance	• Global Hotel Industry Performance • Air Transport Performance	July-December 2024
3: South Africa's Tourism Performance	• South Africa Tourist Arrivals Performance • South Africa's Top 10 African Source Markets • South Africa's Top 10 Overseas Source Markets • Tourist Arrivals: Recovery from COVID-19	July-December 2024 compared to July-December 2023 and July-December 2019-2024
4: Performance of South Africa's Tourism Related Industries	• Accommodation Industry Income • Income from Accommodation (excluding restaurants, bar sales and other income): Recovery from COVID-19 • Food and Beverages Industry Income • Food and Beverages: Recovery from Covid-19 • Passenger Arrivals Movement • Passenger Arrivals Movement: Recovery from Covid-19 • Passenger Departure Movements	July-December 2024 Compared to July-December 2023 and July-December 2019-2024

CHAPTER	INDICATORS	PERIOD REPORTED
	• Passenger Departure Movements: Recovery from Covid-19	
5: Tourism Related Industry Employment	• Employment of Tourism Related Industries	Q3 2024 compared to Q3 2023 and Q4 2024 compared to Q4 2023
6: Annual Tourism Performance		
	• Global Tourist Arrivals Performance • Global Tourist Arrivals by Region • Global Tourist Arrivals Outlook: 2025	2024 compared to 2023 2024 compared to 2023/2019 2019-2024 2018-2023 and 2024 Estimates 2018-2022
• Global Economic Value of Tourism	Travel and Tourism Sector's: • Total Contribution to Gross Domestic Product; • Direct Contribution to Gross Domestic Product; • Total Contribution to Employment; • Direct Contribution to Employment.	
• Global Tourism Related Industry Performance	• Global Hotel Industry Performance; • Air Transport Performance; • Global Car Rental Performance.	
• South Africa's Tourist Arrivals	• Total Tourist Arrivals; • Total Tourist Arrivals by Region; • Tourist Arrival Forecasts for South Africa: 2025-2029.	
• Performance of South Africa's Tourism Related Industries	• Accommodation Industry Income; • Accommodation Industry Occupancy Rate; • Food and Beverages Industry Income; • Airline Industry: Passenger Arrivals Movement; • Airline Industry: Passenger Departure Movements.	
• Economic Value of Tourism for South Africa	Travel and Tourism Sector's: • Total Contribution to Gross Domestic Product; • Direct Contribution to Gross Domestic Product; • Total Contribution to Employment; • Direct Contribution to Employment.	

CHAPTER	INDICATORS	PERIOD REPORTED
	Tourism Satellite Account: • Direct Contribution to GDP • Direct Contribution of Tourism to Employment	

CHAPTER 1: GLOBAL TOURISM PERFOMANCE

This chapter of the report analyses global tourist arrival performance during July-December 2024 compared to same period of the previous year. The data was mainly sourced from the UN Tourism's January 2025 Barometer.

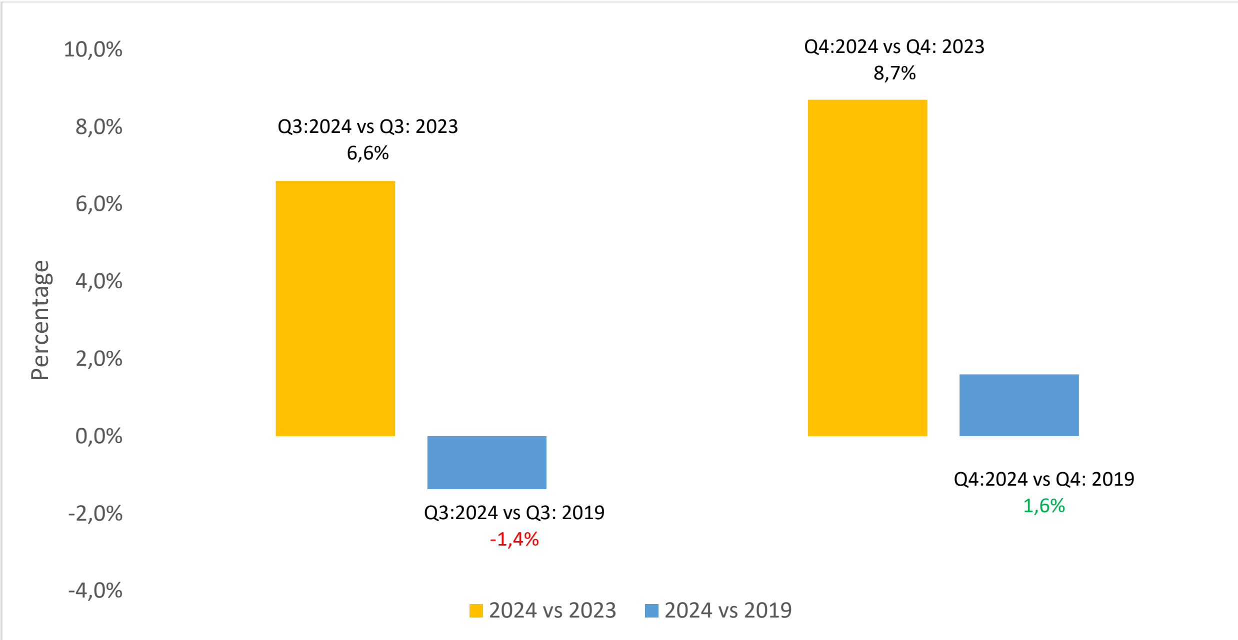
1.1 Global Tourist Arrivals: Q3-Q4 2024 compared to Q3-Q4 2023 and Q3-Q4 2019

The percentage change for total global arrivals for Quarter 3 and Quarter 4 of 2024 compared to the same quarters in 2023 is provided in the figure below. The recovery of global tourist arrival performance from COVID-19 is also provided in the figure below, mainly comparing 2024 performance with 2019. It is important to note that the actual figures for the quarters have not yet been released by UN Tourism, and therefore cannot be reported.

Tourist arrivals increased in Q3:2024 by 6,6% when compared to 2023. Tourist arrivals reported during Q3:2024 was at -1,4% level of tourist arrivals recorded in 2019, pre-COVID 19 period.

Tourist arrivals increased by 8,7% in Q4:2024 when compared to Q4:2023. The Q4:2024 tourist arrivals were at a 1,6% level of tourist arrivals recorded in 2019, pre-COVID period, indicating a positive recovery from COVID-19. According to UN Tourism, the last three months of 2024 were particularly strong, with arrivals exceeding pre-pandemic levels by 3% in October, 1% in November and 1% in December (UN Tourism Barometer, 2025).

Figure 1: Percentage Change of Global Tourist Arrivals: 2024: Q3 & Q4 compared to 2023 and 2019



UN Tourism Barometer: January 2025

1.2 Global Tourist Arrivals by Region: Q3-Q4 2024 compared to Q3-Q4 2023 and Q3-Q4 2019

The table below indicates percentage change of global tourist arrivals by region for the period Q3-Q4 2024 compared to the same quarters in 2023 and 2019. In Q3:2024, all regions experienced an increase in global tourist arrivals when comparing to Q3:2023, with Asia and the Pacific recording the highest increase of 23,9% followed by Africa (11,3%), Americas (4,6%), Europe (3,0%) and the Middle East (1,6%).

In Q4:2024, all regions had an increase in growth for tourist arrivals when comparing to Q4:2023. Asia and the Pacific had the highest increase of 21,0% followed by Africa (10,5%), Europe (5,1%), Americas (5,0%) and Middle East (0,8%).

When comparing 2024 to 2019 pre-COVID period, tourist arrivals for Asia and the Pacific region declined in growth for both Q3 and Q4. However, tourist arrivals pre-COVID for

Africa and Middle East increased in growth during Q3 and Q4. Regions that showed growth in 2024 and 2023 compared to 2019 were the Middle East and Africa. Europe and Americas only showed an increase in Q4: 2024 when compared to the same quarter in 2019.

Table 2: Percentage Change Global Arrivals by Region: 2024 compared to 2023/2019

	Europe		Asia and the Pacific		Americas		Africa		Middle East	
	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4	Q3	Q4
2024 vs 2023	3,0%	5,1%	23,9%	21,0%	4,6%	5,0%	11,3%	10,5%	1,6%	0,8%
2024 vs 2019	-0,6%	1,4%	-9,2%	-6,3%	-4,5%	0,4%	5,7%	11,7%	25,4%	40,2%

UNWTO Barometer: January 2025

More details on the annual performance of global tourist arrivals is provided in Chapter 6: Annual Tourism Performance.

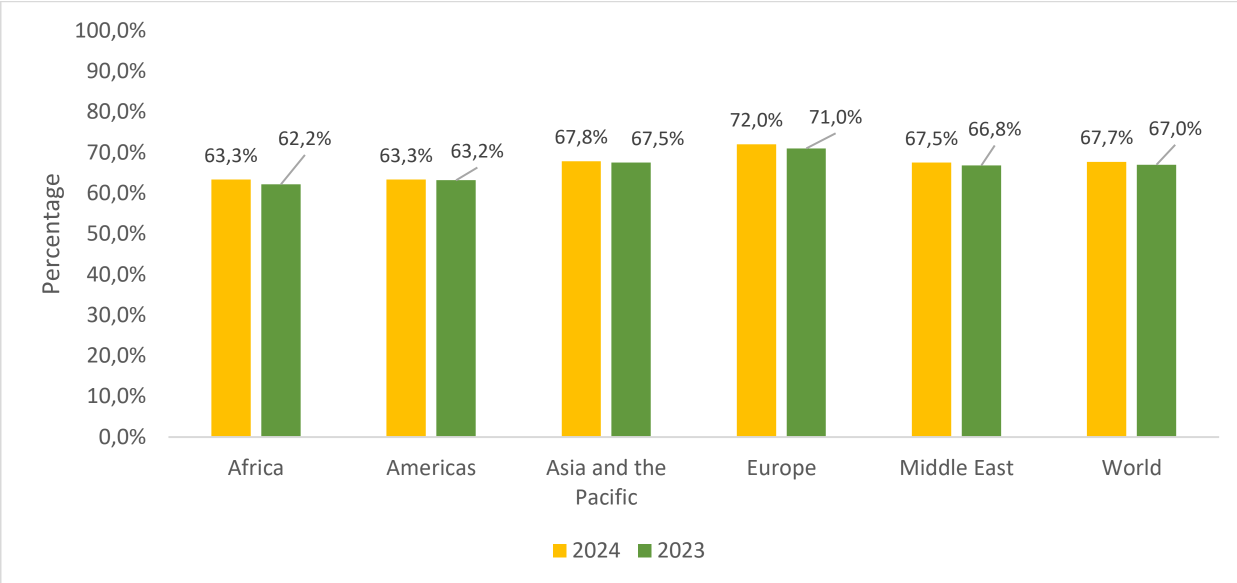
CHAPTER 2: GLOBAL TOURISM RELATED INDUSTRY PERFORMANCE

This section provides an overview of the global tourism-related industries performance, focusing mainly on the global hotels and passenger movement. Data for this section was sourced from the UN Tourism Dashboard and the International Airports Transport Association (IATA).

2.1 Global Hotel Industry Performance: July-December 2024

The data for the performance of the hotel industry was sourced from UN Tourism Tracker dashboard. The average hotel occupancy performance rate of the hotel industry globally by region for July to December 2024 compared to the same period in 2023 is indicated in the figure below.

Figure 2: Average Hotel Occupancy Rates: July-December 2024 compared to July-December 2023



Source: https://www.unwto.org/tourism-data/un-tourism-tracker

Occupancy rate is one of the key indicators used to monitor the performance of a hotel. During July-December 2024, all regions experienced an increase in average hotel occupancy rate compared to 2023. Europe had the highest average occupancy rate during this period and this could be related to the Summer Olympics being hosted in Paris from July 26 to August 11, 2024. The Olympic games are known for attracting many tourists that contribute towards the different industries in the tourism sector including hotels (Vargas, 2024).

2.2 Air Transport Performance: July-December 2024 compared to July -December 2023

The aviation indicators presented in this section include:

- **Revenue Passenger Kilometre (RPK)**, which is calculated by the total number of revenue passengers multiplied by the total distance travelled;
- **Available Seat Kilometres (ASK)**, number of seat carriers have available multiplied by the number of kilometres flown; and
- **Passenger Load Factor (PLF)**, is an airline industry indicator that measures how much of an airline's passenger carrying capacity is used.

According to IATA data, the aviation industry experienced an increase across all total market indicators during July to December 2024, compared to the same period in 2023. A similar trend was observed for domestic aviation indicators. The only decline was noted in the International Passenger Load Factor (PLF), which decreased by 0,3% in July 2024 compared to the same month in the previous year.

According to IATA (2025), full-year international traffic surpassed the previous 2019 high by 0,5% in 2024, with growth in all regions. More details on the annual performance of the aviation sector can be found in Chapter 6: Annual Tourism Performance.

Table 3: Air Transport Performance Indicators July-December 2024 compared to July-December 2023

% Change	International			Domestic			Total Market		
	RPK	ASK	PLF	RPK	ASK	PLF	RPK	ASK	PLF
Jul 24 comp. to Jul 23	10,1%	10,5%	-0,3%	4,8%	2,8%	1,7%	8,0%	7,4%	0,5%
Aug 24 comp. to Aug 23	10,6%	10,1%	0,4%	5,6%	1,2%	3,6%	8,6%	6,5%	1,6%
Sept 24 comp. to Sept 23	9,2%	9,1%	0,1%	3,7%	0,7%	2,4%	7,1%	5,8%	1,0%
Oct 24 comp. to Oct 23	9,5%	8,6%	0,6%	3,5%	2,0%	1,2%	7,1%	6,1%	0,8%
Nov 24 comp. to Nov 23	11,6%	8,6%	2,3%	3,1%	1,5%	1,2%	8,1%	5,7%	1,9%
Dec 24 comp. to Dec 23	10,6%	7,7%	2,2%	5,5%	2,3%	2,5%	8,6%	5,6%	2,3%

RPK – Revenue Passenger Kilometres,
ASK – Available Seats Kilometres,
PLF – Passenger Load Factor.

Source: IATA, Air Passenger Market Analysis, 2024

CHAPTER 3: SOUTH AFRICA’S TOURISM PERFORMANCE

This section presents an analysis of South Africa's inbound tourism performance for the period July-December 2024, compared to July-December 2023, with a focus on total tourist arrivals. The data is sourced from Statistics South Africa's International Tourism reports and data cuts.

3.1 South Africa’s Tourist Arrivals: July-December 2024 Compared to July-December 2023

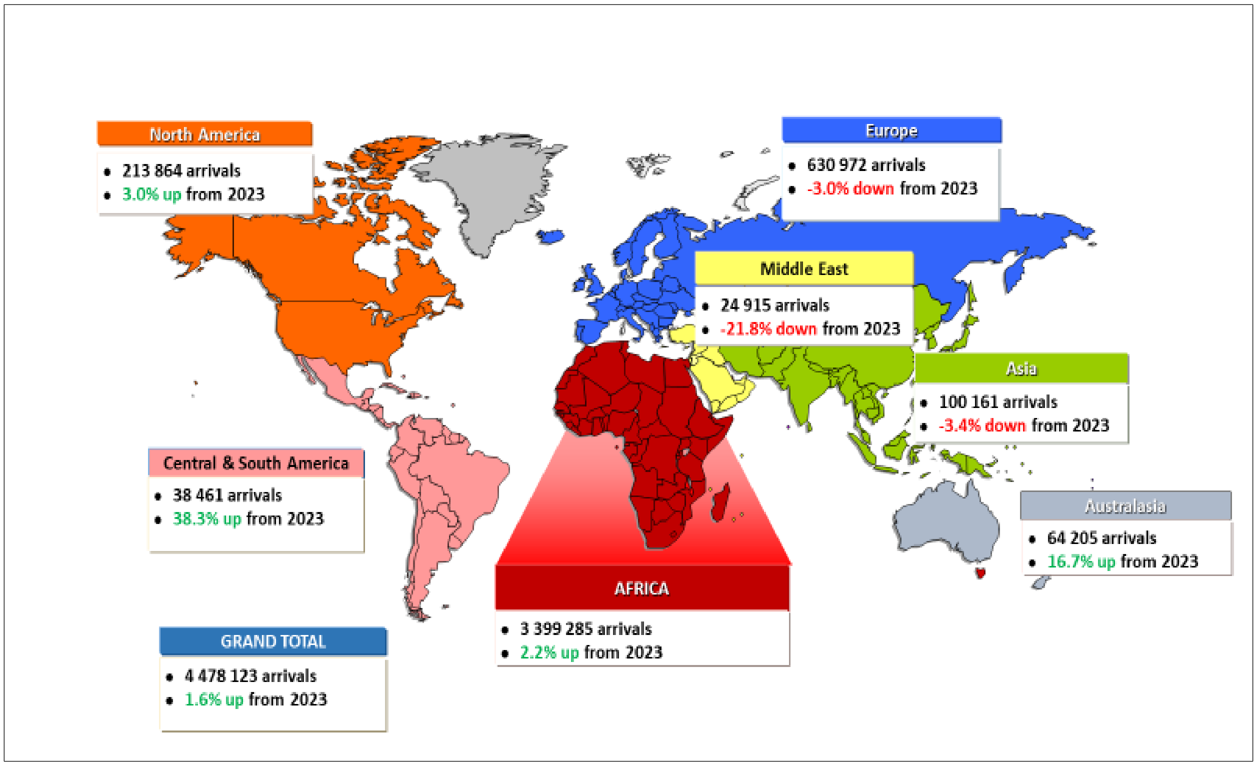
The figure 3 below indicates that total tourist arrivals in South Africa went up by 1,6% during July-December 2024 compared to the same period in 2023. This was an increase from a total of 4 409 633 tourist arrivals during the second half of 2023 to 4 478 123 (68 490) during the same period in 2024. Central and South America (38,3%) had the highest increase followed by Australasia (16,7%) and North America (3,0%). Middle East experienced the highest decline of -21,8% and Asia and Europe also declined with -3,4% and -3,0% respectively when July-December 2024 period is compared to July-December 2023. Tourist arrivals from Africa increased by 2,2% moving from a total of 3 326 809 during July-December 2023 to a total of 3 399 285 reported for July-December 2024 period.

Further analysis indicates that in Australasia, Australia recorded the highest increase in volume of 8 352 (18,7%). Germany had seen the highest increase in volume (3 543; 2,9%) in the Europe region. In North America, USA reported the highest increase in volume (5 099; 2,8%). Kuwait had recorded the highest growth in volume for the Middle East region, with an additional 374 tourists compared to July-December 2023. In Central and South America, Brazil had recorded the highest increase in volume (9 332; 56,4%) and in Asia, Singapore experienced the highest rise in volume (816; 21,1%) for the period under review.

Tourist arrivals from Africa increased by 2,2% (72 476) during the same period under review and this region remained the main source of tourist arrivals to the country, accounting for 75,9% (3 399 285) of total tourist arrivals during July-December 2024. In terms of volume, the increase recorded from the continent was driven by a growth of (122

119; 17,9%) from Mozambique followed by Eswatini (51 852; 13,0%) and Malawi (14 441; 17,9%).

Figure 3: Total Tourist Arrivals by Region July-December 2024 vs. July-December 2023



Source: Stats SA International Tourism Report: December 2024 and data cuts.

3.2 South Africa's Top 10 African Source Markets: July-December 2024 vs. July-December 2023

Table below gives the rankings of the top ten African source markets for July-December period compared to July-December 2023. Most of the top ten African source markets remained in their positions during the period under review except for Malawi and Namibia, Malawi improved their 7th position to 6th, while Namibia dropped from 6th position to 7th in July-December 2024. Ghana replaced Angola in the top ten, moving from the 15th position to 10th position in July-December 2024. Most of the top ten countries recorded a growth during July-December 2024 when compared to July-December 2023 except for Lesotho and Zimbabwe, which had a decline of -15,6% and -5,9% respectively. Ghana experienced the highest increase of 116,9% followed by Mozambique and Malawi, with each country experiencing an increase of 17,9%.

Table 4: South Africa's Top 10 African Source Markets: July-December 2024 vs. July-December 2023

Country	Rank: July-December 2024	Tourist Arrivals July-December 2024	Rank: July-December 2023	Tourist Arrivals July-December 2023	% Change
Zimbabwe	1	1 032 956	1	1 098 171	-5,9%
Mozambique	2	805 326	2	683 207	17,9%
Lesotho	3	467 920	3	554 283	-15,6%
Eswatini	4	452 157	4	400 305	13,0%
Botswana	5	217 074	5	205 218	5,8%
Malawi	6	95 118	7	80 677	17,9%
Namibia	7	87 285	6	84 074	3,8%
Zambia	8	79 485	8	79 487	0,0%
Kenya	9	26 722	9	23 308	14,6%
Ghana	10	20 982	15	9 673	116,9%

Source: Stats SA International Tourism Report: December 2024 and data cuts.

3.3 South Africa's Top 10 Overseas Source Markets: July-December 2024 vs. July-December 2023

Table below shows the rankings of the top ten overseas source markets. Comparing July-December 2024 with July-December 2023, half of the top 10 overseas markets experienced a decrease in tourist arrivals with India recording the highest decline of -12,1% followed by Italy (-7,8%) and UK (-6,0%). Brazil had the highest increase of 56,4%. Most of the top ten overseas source markets remained in their positions for the period under review, except for Brazil, which moved up from 14th position to 10th, replacing Belgium in the top ten list. USA remained the top source market during the period under review.

Table 5: South Africa's Top 10 Overseas Source Markets: July-December 2024 vs. July-December 2023

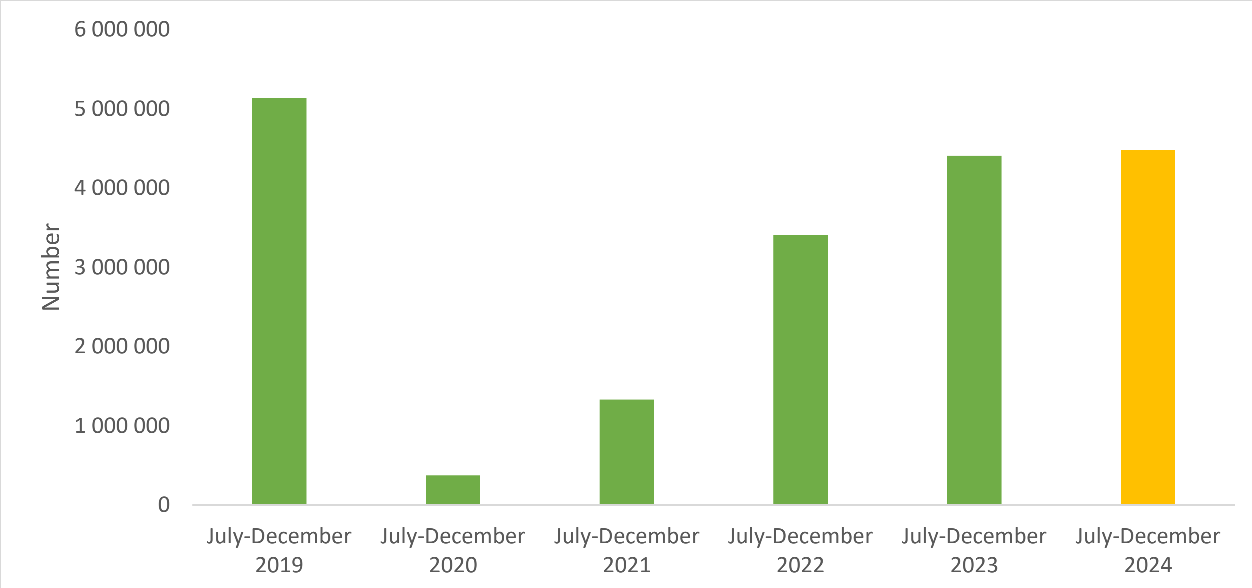
Country	Rank: January-July 2024	Tourist Arrivals January-July 2024	Rank: January-July 2023	Tourist Arrivals January-July 2023	% Change
USA	1	184 671	1	179 572	2,8%
UK	2	165 888	2	176 467	-6,0%
Germany	3	126 005	3	122 462	2,9%
The Netherlands	4	73 513	4	77 288	-4,9%
France	5	62 985	5	63 561	-0,9%
Australia	6	52 982	6	44 630	18,7%
India	7	33 508	7	38 106	-12,1%
Italy	8	30 789	8	33 411	-7,8%
Canada	9	29 193	9	28 073	4,0%
Brazil	10	25 886	14	16 554	56,4%

Source: Stats SA International Tourism Report: December 2024 and data cuts.

3.4 Tourist Arrivals: Recovery from COVID-19

The analysis below aims to monitor the recovery of the tourism sector by analysing the performance of the specific indicator: total tourist arrivals, for July-December 2024 period compared to the same period in 2019. Total tourist arrivals recorded for July-December 2024 was 4 478 123, which was a decline of -12,8% compared to July-December 2019 (-655 273).

Figure 4: Tourist Arrivals July-December 2019-2024



	July-December 2019	July-December 2020	July-December 2021	July-December 2022	July-December 2023	July-December 2024	July-December 2024 compared to July-December 2019
Tourist Arrivals	5 133 396	373 143	1 329 437	3 412 316	4 409 633	4 478 123	
Diff.		-4 760 253	956 294	2 082 879	997 317	68 490	-655 273
% Diff		-92,7%	256,3%	156,7%	29,2%	1,6%	-12,8%

Source: International Tourism Report: Jul-Dec 2019-2024 data cuts.

CHAPTER 4: PERFORMANCE OF SOUTH AFRICA'S TOURISM-RELATED INDUSTRIES

Many industries are economically dependent on the tourism sector and these include amongst others; accommodation, restaurants, transportation, amusements, and retail trade. The performance of these industries is key to the tourism sector's contribution to GDP and total employment. This chapter of the report focuses on the performance of some of the tourism-related industries in South Africa during July-December 2024 compared to July-December 2023.

4.1 ACCOMMODATION INDUSTRY

The following sub-section of the report focuses on the performance of the accommodation industry by analysing key indicators such as total income from accommodation and occupancy rates. The data is sourced from Stats SA's Tourist Accommodation report and data cuts.

Accommodation Industry Income: July-December 2024 compared to July-December 2023

The total income from the accommodation industry, which is provided in table 6 below showed a growth of 6,3% from an amount of R27 556,9 million in July-December 2023 to R29 297,4 million in July-December 2024. Compared to the same period in 2023, all categories of accommodation experienced an increase in income. Caravan parks and camping sites had the highest growth (11,2%), followed by Other accommodation (9,8%), Guest houses and guest farms (8,8%) and Hotels (5,0%). Other category includes lodges, bed-and-breakfast, self-catering and 'other' establishments not classified.

Table 6: Income from Accommodation (current prices): July-December 2024 compared to July-December 2023

Type of Accommodation	July-December 2024				July-December 2023				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Jul-Dec 2024 compared to Jul-Dec 2023
Hotels (R million)	R4 108,6	R9 907,4	R6 749,6	R20 765,6	R3 792,5	R9 016,4	R6 974,6	R19 783,5	5,0%
Caravan parks and camping sites (R million)	R25,6	R422,3	R10,9	R458,8	R22,2	R377,9	R12,5	R412,6	11,2%
Guest houses and guest farms (R million)	R144,1	R750,4	R79,8	R974,3	R135,3	R683,5	R76,4	R895,2	8,8%
Other accommodation (lodges. bed-and-breakfast. self-catering. and 'other' establishments not classified) (R million)	R540,2	R6 133,1	R425,4	R7 098,7	R581,1	R5 523,3	R361,2	R6 465,6	9,8%

Type of Accommodation	July-December 2024				July-December 2023				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Jul-Dec 2024 compared to Jul-Dec 2023
Total Industry - (R million)	R4 818,5	R17 213,2	R7 265,7	R29 297,4	R4 531,1	R15 601,1	R7 424,7	R27 556,9	6,3%

Source: Stats SA: Accommodation December 2024 data cuts.

Income from Accommodation (excluding restaurants. bar sales and other income): July-December 2024 compared to July-December 2023

Table below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 10,3% during the same period under review. All categories of accommodation recorded a growth in income levels. Caravan parks and camping sites recorded the highest growth of 11,7%; followed by Other accommodation (11,0%), Hotels (9,9%) and Guest houses and guest farms (9,8%).

Table 7: Income from Accommodation Only: July-December 2024 compared to July-December 2023

Type of Accommodation	July-December 2024	July-December 2023	% Change July-December 2024 compared to July-December 2023
Hotels (R million)	R9 907,4	R9 016,4	9,9%
Caravan parks and camping sites (R million)	R422,3	R377,9	11,7%
Guest houses and guest farms (R million)	R750,4	R683,5	9,8%
Other accommodation (R million)	R6 133,1	R5 523,3	11,0%
Total Industry (R million)	**R17 213,2**	**R15 601,1**	**10,3%**

Source: Stats SA: Accommodation December 2024 data cuts.

Accommodation Industry Occupancy Rate: July-December 2024 compared to July-December 2023

Table below shows average occupancy rates by accommodation type from July-December 2024 compared to July-December 2023. For the period July-December 2024, there was a slight increase in the average occupancy rate for the total accommodation industry, up from 37,4% in July-December 2023 to 37,9% during the same period in 2024; with hotels having the highest occupancy rate (45,0%) in July-December 2024.

Table 8: Average Occupancy Rate (%) July-December 2024 compared to July-December 2023

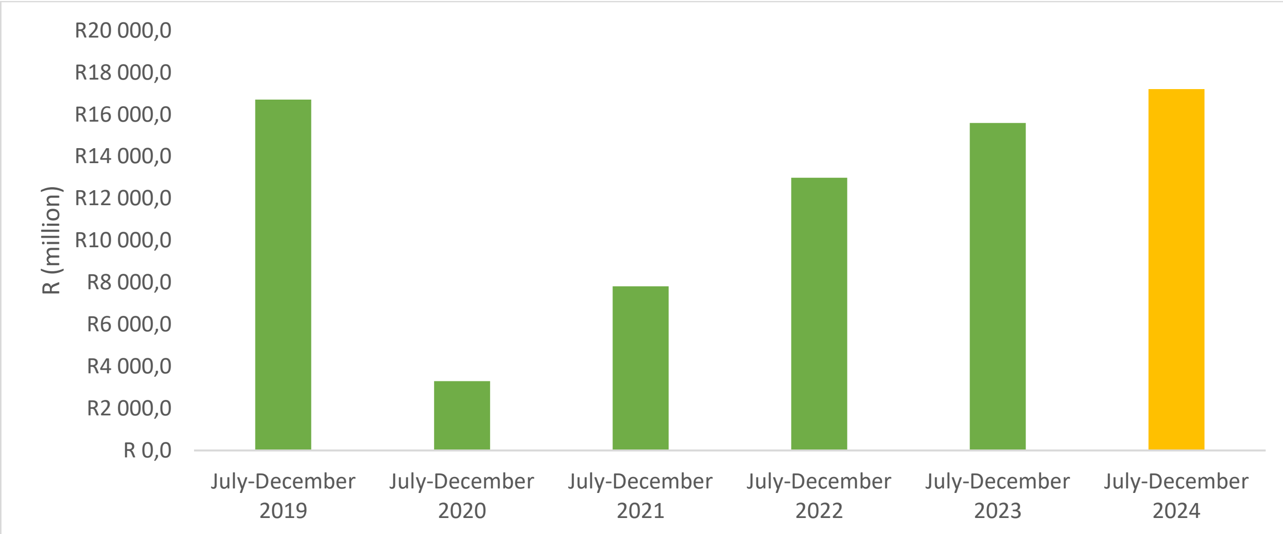
Occupancy Rates	July-December 2024	July-December 2023
Hotels	45,0	44,8
Caravan parks and camping sites	33,5	33,5
Guest houses and guest farms	22,0	21,7
Other accommodation	31,1	29,8
Total Industry	**37,9**	**37,4**

Source: Stats SA: Accommodation Report December 2024

Income from Accommodation (excluding restaurants, bar sales and other income): Recovery from the impact of COVID-19

Figure below provides the total income from accommodation for the July-December 2019-2024 period. Income from accommodation in July-December 2024 was R17 213,2 million and this was an increase of 3,0% compared to the same period in 2019, pre-COVID period.

Figure 5: Income from Accommodation: July-December 2019-2024



	July-December 2019	July-December 2020	July-December 2021	July-December 2022	July-December 2023	July-December 2024	July-December 2024 compared to July-December 2019
Income from Accommodation: Total Industry	R16 708,5	R3 303,0	R7 814,3	R12 986,8	R15 601,1	R17 213,2	
Diff.		-R13 405,5	R4 511,3	R5 172,5	R2 614,3	R1 612,1	R504,7
% Diff		-80,2%	136,6%	66,2%	20,1%	10,3%	3,0%

Source: Stats SA: Accommodation December 2024 data cuts.

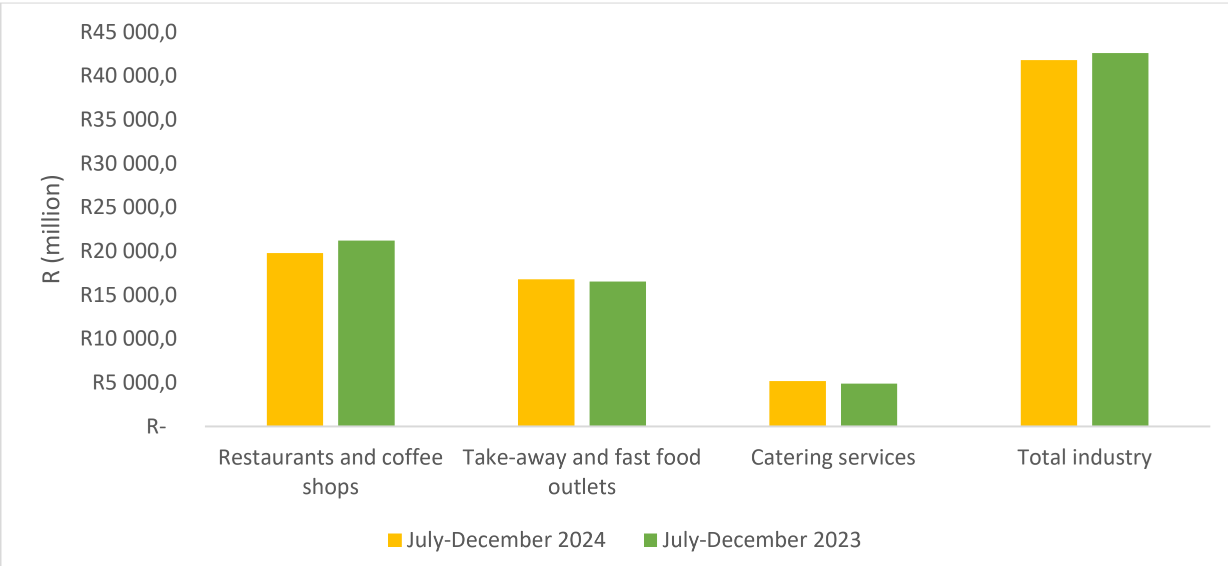
4.2 FOOD AND BEVERAGES INDUSTRY

The performance of the food and beverages industry for July-December 2024 compared to the same months of the previous year is provided in this section. The performance of the industry post COVID-19 is also presented below. The data is sourced from Stats SA's Food and Beverages reports and data cuts.

Food and Beverages Industry Income: July-December 2024 compared to July-December 2023

The total income of the food and beverages industry for July-December 2024 compared to same period last year is shown in figure below. The total income of the food and beverages industry was about R41 770,4 million in July-December 2024, reporting a decrease of -1,9% when compared to income of about R42 599,8 million during the same period in 2023. All categories of food and beverages industry experienced a growth except restaurants and coffee shops, which reported a decline of -6,6%. The highest positive growth seen was for catering services (6,6%), followed by take-away and fast food outlets (1,5%).

Figure 6: Total Income by Type of Food and Beverages Industry: July-December 2024 compared to July-December 2023. *(Income at constant 2015 prices for the latest six months by type of enterprise)*



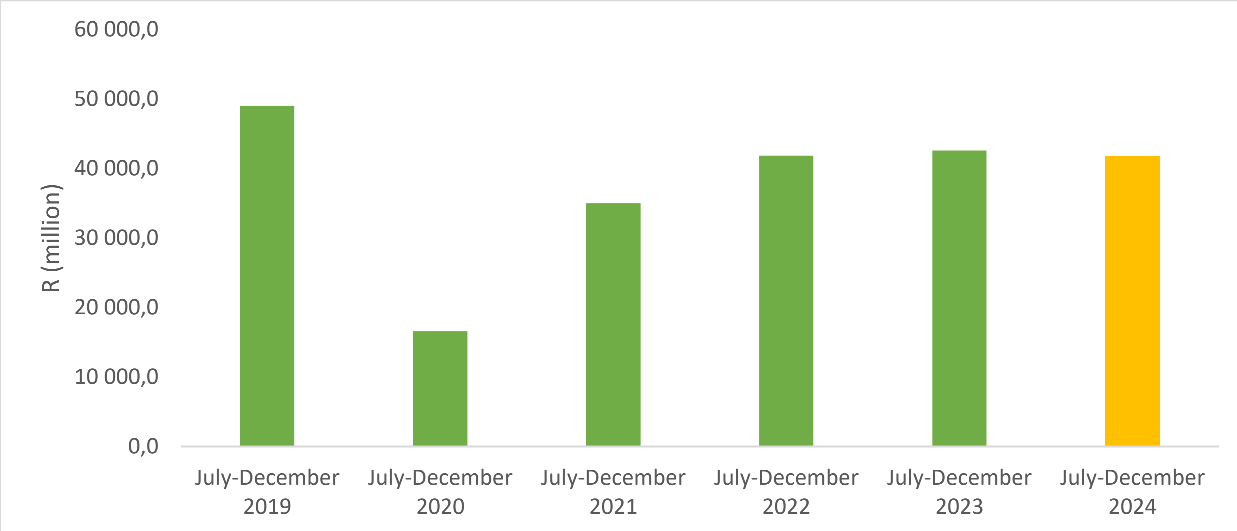
	Restaurants and coffee shops	Take-away and fast food outlets	Catering services	Total industry
July-December 2024	R 19 796,6	R 16 779,1	R 5 194,7	**R 41 770,4**
July-December 2023	R 21 200,7	R 16 526,7	R 4 872,4	**R 42 599,8**
% Change	-6,6%	1,5%	6,6%	**-1,9%**

Source: Stats SA Food and Beverages December 2024 data cuts.

Food and Beverages: Recovery from COVID-19

The figure below indicates income from food and beverages for the period July-December 2019-2024. Total income from food and beverages for July-December 2024 declined by -14,8% compared to July-December 2019, pre-COVID period.

Figure 7: Total Income by Type of Food and Beverages Industry: July-December 2019 to July-December 2024



	July-December 2019	July-December 2020	July-December 2021	July-December 2022	July-December 2023	July-December 2024	July-December 2024 compared to July-December 2019
Income from Food and Beverages: Total Industry	49 035,1	16 593,7	34 989,6	41 848,6	42 599,8	41 770,4	
Diff.		-32 441,4	18 395,9	6 859,0	751,2	-829,4	-7 264,7
% Diff		-66,2%	110,9%	19,6%	1,8%	-1,9%	-14,8%

Source: Stats SA Food and Beverages December 2024 data cuts.

4.3 AIRLINE INDUSTRY: PASSENGERS MOVEMENT

This section provides an overview of the airline industry performance in South Africa. Data for this section was sourced from Airports Company South Africa (ACSA). The performance of the industry post COVID-19 is also presented below.

Passenger Arrivals Movement: July-December 2024 compared to July-December 2023

The table below shows the total passenger arrivals at ACSA airports during July-December 2024 compared to July-December 2023. Total passenger arrivals increased by 3,4%, moving from 9 432 171 in July-December 2023 to 9 755 636 during the same months in 2024. International passengers arriving during July-December 2024 grew by 6,5% compared to the same period in 2023. Regional passengers also showed some growth (11,8%) during the same period under review. The number of domestic passengers increased by 2,0% moving from 6 536 430 in July-December 2023 to 6

667 164 in July-December 2024. Passengers arriving on unscheduled flights recorded a decrease of -17,4%.

Table 9: Arriving Passengers to South Africa by Region July-December 2024 compared to July-December 2023

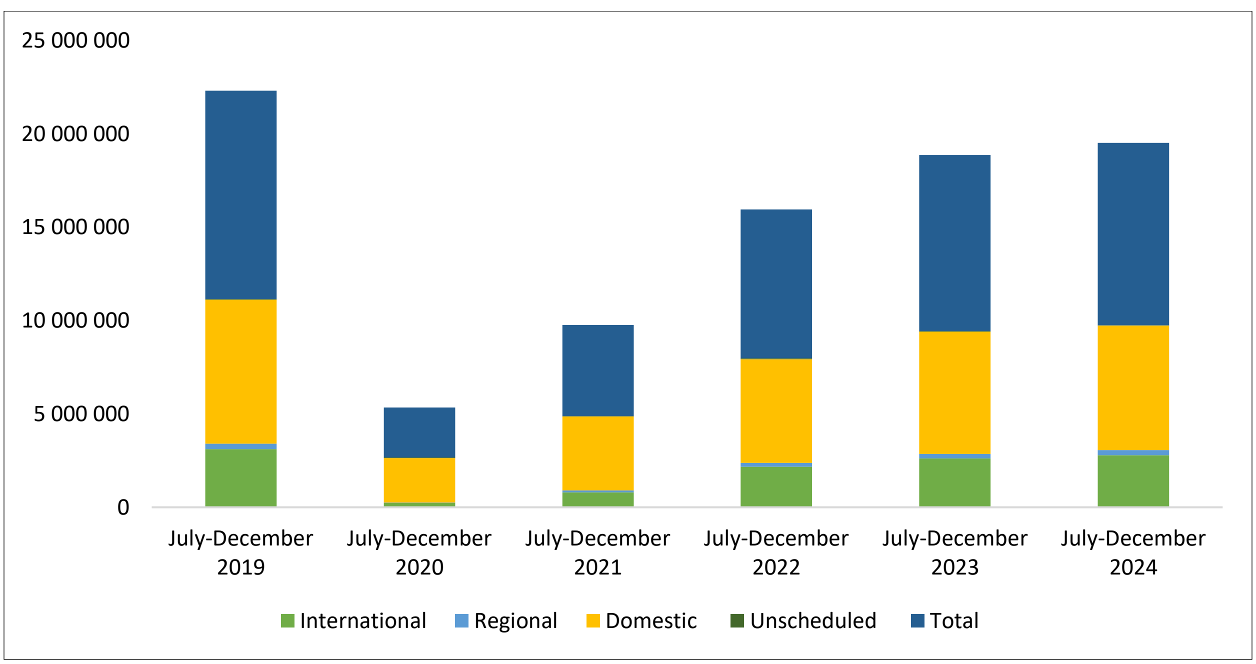
Arriving Passengers	July-December 2024	July-December 2023	Difference	% Change
International	2 791 834	2 621 653	170 181	6,5%
Regional	269 215	240 824	28 391	11,8%
Domestic	6 667 164	6 536 430	130 734	2,0%
Unscheduled	27 423	33 219	-5 796	-17,4%
Total	**9 755 636**	**9 432 171**	**323 465**	**3,4%**

Source: ACSA Data Cuts December 2024

Passenger Arrivals Movement: Recovery from Covid-19

Figure 8 below indicates passenger arrivals movement in ACSA airports for July-December 2019 compared to July-December 2024. Total passenger arrivals movement recorded during July-December 2019 was 11 152 897 compared to 9 755 636 during the same period in 2024. This was a decline of -12,5% in 2024 compared to 2019.

Figure 8: Passenger Arrivals Movement: July-December 2019-2024



Arriving Passengers	July-December 2019	July-December 2020	July-December 2021	July-December 2022	July-December 2023	July-December 2024	July-December 2024 compared to July-December 2019
International	3 106 290	229 109	802 067	2 175 050	2 621 653	2 791 834	-10,1%
Regional	293 057	15 375	93 180	196 305	240 824	269 215	-8,1%
Domestic	7 721 980	2 393 864	3 963 866	5 565 518	6 536 430	6 667 164	-13,7%
Unscheduled	31 570	34 343	26 401	39 462	33 219	27 423	-13,1%
Total	**11 152 897**	**2 672 691**	**4 885 514**	**7 976 335**	**9 432 171**	**9 755 636**	**-12,5%**

Source: ACSA Data Cuts December 2024

Passenger Departure Movements: July-December 2024 compared to July-December 2023

Table 10 below shows the total passengers departing from ACSA airports during July-December 2024 compared to July-December 2023. Total passengers departing from the country increased by 3,0% in July-December 2024 compared to same period in 2023. The number of international, regional and domestic passengers departing from different ACSA airports also showed a positive growth in July-December 2024 compared to July-December 2023. For passengers departing on unscheduled flights, there was a decrease of -17,6%; declining from 33 808 during July-December 2023 to 27 859 in July-December 2024.

Table 10: Departing Passengers from South Africa by Region: July-December 2024 compared to July-December 2023

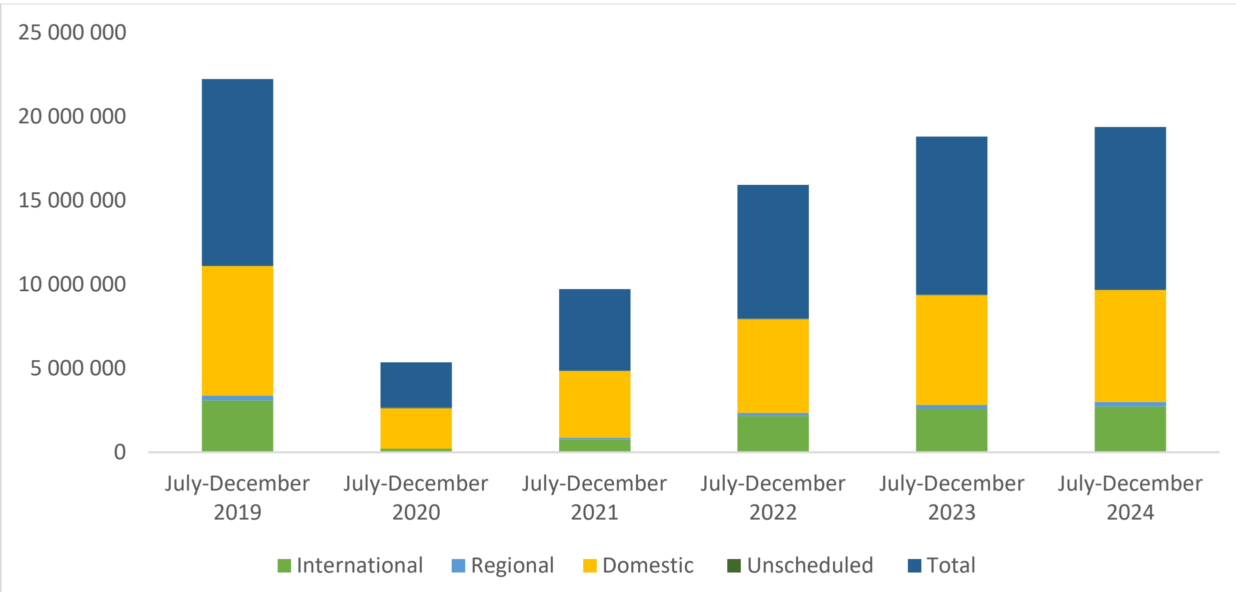
Departing Passengers	July-December 2024	July-December 2023	Difference	% Change
International	2 728 927	2 590 467	138 460	5,3%
Regional	260 836	230 979	29 857	12,9%
Domestic	6 671 411	6 549 588	121 823	1,9%
Unscheduled	27 859	33 808	-5 949	-17,6%
Total	**9 689 033**	**9 404 842**	**284 191**	**3,0%**

Source: ACSA Data Cuts December 2024

Passenger Departure Movements: Recovery from COVID-19

Figure below indicates passenger departure movements for July-December 2019 compared to July-December 2024. Total passenger departure movements reported during July-December 2019 was 11 124 220 compared to 9 689 033 during the same period in 2024. This was a decline of -12,9% in 2024 compared to 2019.

Figure 9: Passenger Departure Movements: July-December 2019-2024



Departing Passengers	July-December 2019	July-December 2020	July-December 2021	July-December 2022	July-December 2023	July-December 2024	July-December 2024 compared to July-December 2019
International	3 093 975	208 131	775 619	2 160 319	2 590 467	2 728 927	-11,8%
Regional	286 966	16 109	93 880	188 550	230 979	260 836	-9,1%
Domestic	7 711 298	2 400 529	3 969 562	5 579 779	6 549 588	6 671 411	-13,5%
Unscheduled	31 981	55 399	26 964	38 091	33 808	27 859	-12,9%
Total	11 124 220	2 680 168	4 866 025	7 966 739	9 404 842	9 689 033	-12,9%

Source: ACSA Data Cuts December 2024

CHAPTER 5: TOURISM RELATED INDUSTRY EMPLOYMENT

The tourism employment data presented in this section is sourced from Stats SA's Quarterly Labour force Survey (QLFS). Due to the data being released on a quarterly basis, the performance of the tourism related jobs for Q3:2024 is compared to Q3:2023 and Q4:2024 is compared to Q4:2023.

Estimates on the number of direct jobs created by the tourism sector in South Africa are calculated by applying ratios to the different tourism related industries. The ratios were sourced from the latest Tourism Satellite Account for South Africa Provisional 2020, 2021 and 2022 and are indicated in the table below. The 2022 ratios were used for the estimates as they were more in line with 2019 ratios. . .

Table 11: Tourism Employment Ratios from TSA: provisional 2020, 2021 and 2022

Industries	Ratios (%)
Retail Trade	11
Accommodation	79
Food and Beverages	36
Railway	9
Road	36
Water	69
Air Passenger	96
Travel Agencies	98
Transport Rental Equipment	66
Cultural Industry	24
Sports and Recreation	22

Source: Tourism Satellite Account for South Africa, provisional 2020, 2021 and 2022

5.1 Employment of Tourism Related Industries: Q3: July-September 2024 compared to Q3: July-September 2023

Table below indicates that an estimated 5,3% of South African jobs were created by tourism related industries during Q3: July-September 2024 which was an increase of 11,8% (94 445) in total jobs created by these tourism related industries when compared to July-September 2023 period.

Table 12: Tourism Related Industries Employment: Q3:2024 compared to Q3: 2023

Employment	Jul-Sept 2024	Jul-Sept 2023	Difference	% Growth
Total Tourism Related Industries Employment	893 430	798 985	94 445	**11,8%**
Total Employment	16 946 173	16 744 781	201 392	1,2%
& share of tourism related industries to total employment	**5,3%**	4,8%		

Source: Stats SA Q3 & Q4 2024 Labour Force Survey data cuts

The table below provides the share of the total jobs created by the different tourism related industries for the period July-September 2024 compared to July-September 2023. When tourism ratios are applied to calculate direct tourism employment during July-September

2024, almost 30% of jobs were created by the road passenger transport industry, followed by the retail trade (17,5%).

Table 13: Tourism Related Industries Share of Employment: July-September 2024 compared to July-September 2023

Employment	2023	2024
	% Share	
Accommodation	11,6%	15,8%
Food and Beverage	19,2%	17,0%
Railway passenger transport	6,6%	6,8%
Road Passenger transport	29,8%	28,5%
Water passenger transport services	0,37%	0,3%
Air Passenger Transport	1,7%	3,3%
Transport Equipment Rental	0,7%	0,5%
Travel agencies	3,4%	4,1%
Cultural Services	3,5%	3,8%
Sporting and other recreation services	2,6%	2,4%
Retail trade	20,5%	17,5%
Total Employment	**100,0%**	**100,0%**

Source: Stats SA Q3 & Q4 2024 Labour Force Survey data cuts

5.2 Employment of Tourism Related Industries: Q4: October-December 2024 compared to Q4: October-December 2023

Table below indicates that an estimated 5,3% of South African jobs were created by tourism related industries during Q4: October-December 2024, which was an increase of 11,6% (94 126) in total jobs created by these tourism related industries when compared to October-December 2023 period.

Table 14: Tourism Related Industries Employment: Q4:2024 compared to Q4: 2023

Employment	Oct-Dec 2024	Oct-Dec 2023	Difference	% Growth
Total Tourism Related Industries Employment	905 993	811 867	94 126	**11,6%**
Total Employment	17 077 842	16 723 195	354 647	2,1%
% share of tourism related industries to total employment	**5,3%**	4,9%		

Source: Stats SA Q4 2019-2024 Labour Force Survey

Table below provides the share of the total jobs created by the different tourism related industries for October-December 2024 compared to October-December 2023. When tourism ratios are applied to calculate the share of direct tourism related jobs, almost 30% of the tourism related jobs were created by the road passenger transport (29,5) followed by food and beverages (16,9%) for the period under review.

Table 15: Tourism Related Industries Share of Employment: October-December 2024 compared to October-December 2023

Employment	2023	2024
	% Share	
Accommodation	10,2%	15,1%
Food and Beverage	18,1%	16,9%
Railway passenger transport	7,5%	7,1%
Road Passenger transport	32,3%	29,5%
Water passenger transport services	0,21%	0,3%
Air Passenger Transport	2,6%	3,6%
Transport Equipment Rental	1,1%	0,7%
Travel agencies	2,6%	4,1%
Cultural Services	3,6%	4,0%
Sporting and other recreation services	2,6%	2,0%
Retail trade	19,0%	16,8%
Total Employment	**100,0%**	**100,0%**

Source: Stats SA Q4 2019-2024 Labour Force Survey

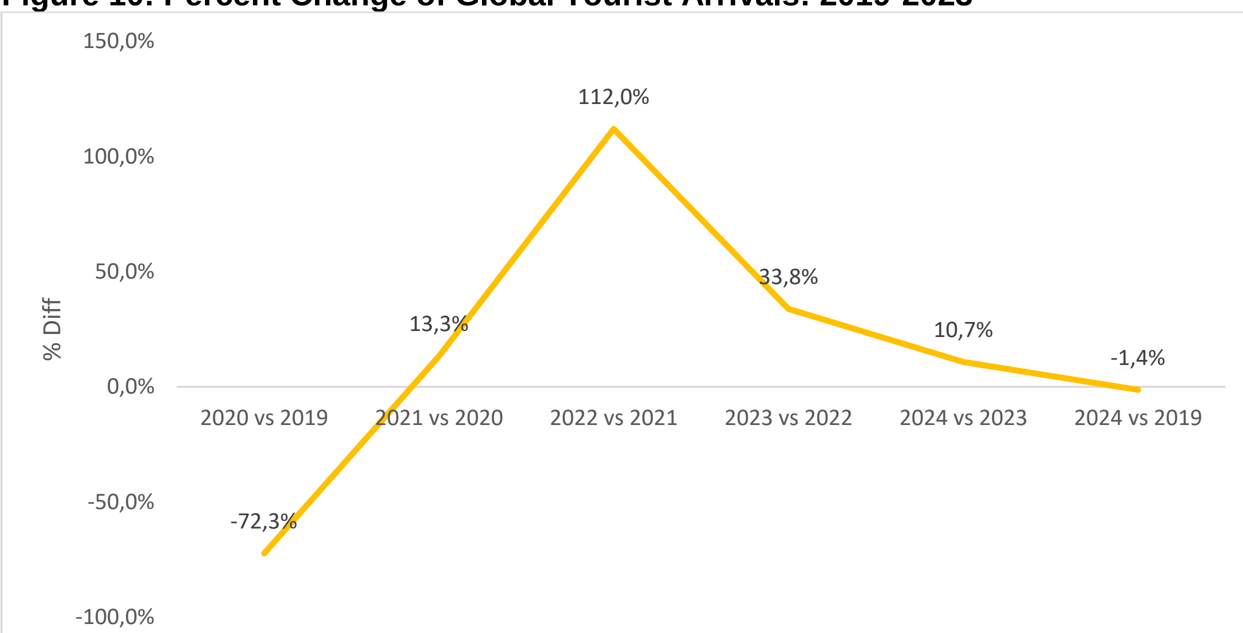
CHAPTER 6: ANNUAL TOURISM PERFORMANCE

6.1 Global Tourist Arrivals Performance: 2019-2024

The trends of global tourist arrivals for the period 2019 to 2024 is provided in the figure below. The data is sourced from UN Tourism and at the time of the release country data was not yet released for 2024.

The figure below indicates that tourist arrivals decreased in 2020 by -72,3% when compared to 2019. Comparing 2021 to 2020, global tourist arrivals increased by 13,3%. Global tourist arrivals further increased by 112,0% in 2022 when compared to the same period in 2021. There was an increase of 33,8% of global tourist arrivals recorded in 2023, when compared to 2022. Comparing 2024 to 2023, there was an increase of 10,7% in global tourist arrivals. Tourist arrivals reported during 2024 were at -1,4% level of tourist arrivals recorded in 2019, pre-COVID period.

Figure 10: Percent Change of Global Tourist Arrivals: 2019-2023



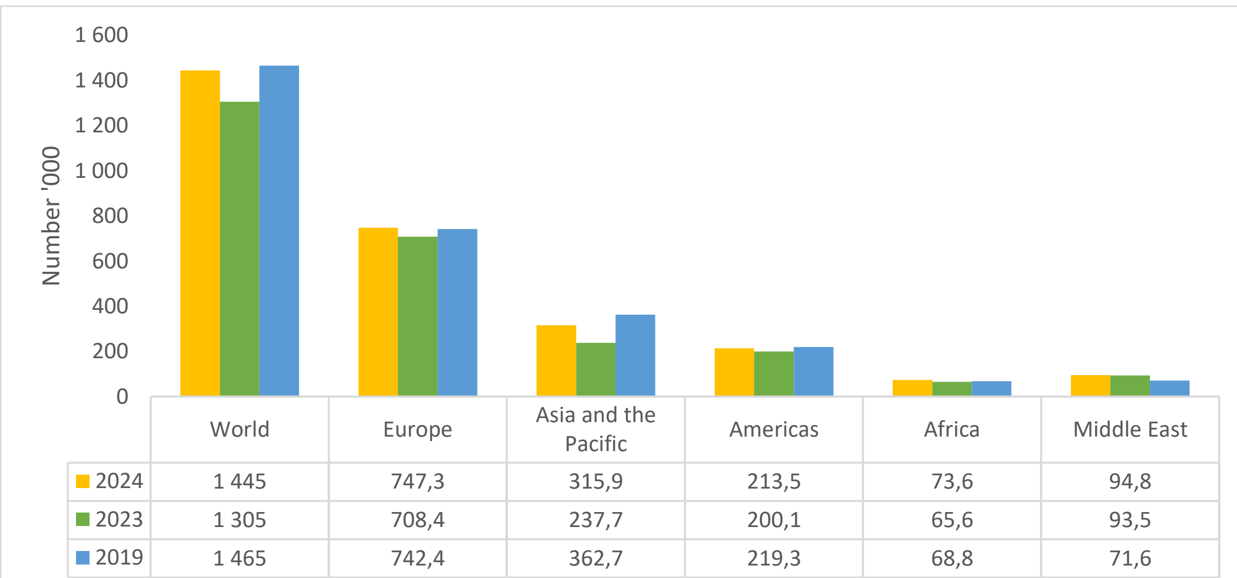
	2019	2020	2021	2022	2023	2024	2024 vs 2019
World (millions)	1 465	406	460	975	1 305	1445	
Diff		-1 059	54	515	330	140	-20
% Diff		-72,3%	13,3%	112,0%	33,8%	10,7%	-1,4%

Source: UN Tourism World Tourism Barometer, January 2025

6.2 Global Tourist Arrivals by Region: 2024 compared to 2023/2019

Figure below indicates percentage change of global tourist arrivals by region for the period 2024 compared to 2023. All regions had an increase in global tourist arrivals with Asia and the Pacific having the highest growth of 32,9%, followed by Africa (12,2%), Americas (6,7%), Europe (5,5%) and Middle East (1,4%). When the data is compared to 2019 (pre-Covid pandemic), regions that showed recovery from the pandemic were Middle East (32,4%), Africa (7%) and Europe (0,7%). According to UN Tourism (2025), Middle East destinations that reported strong results in the first ten to twelve months of 2024 compared to 2019 were Qatar (137%), Saudi Arabia (69%) and Egypt (23%). In Africa, countries that showed recovery from COVID-19 levels included Ethiopia (40%), Morocco (35%), Tunisia (9%) and Kenya (9%) (UN Tourism, 2025).

Figure 11: Percentage Change of Global Arrivals by Region: 2024 compared to 2023 and 2019



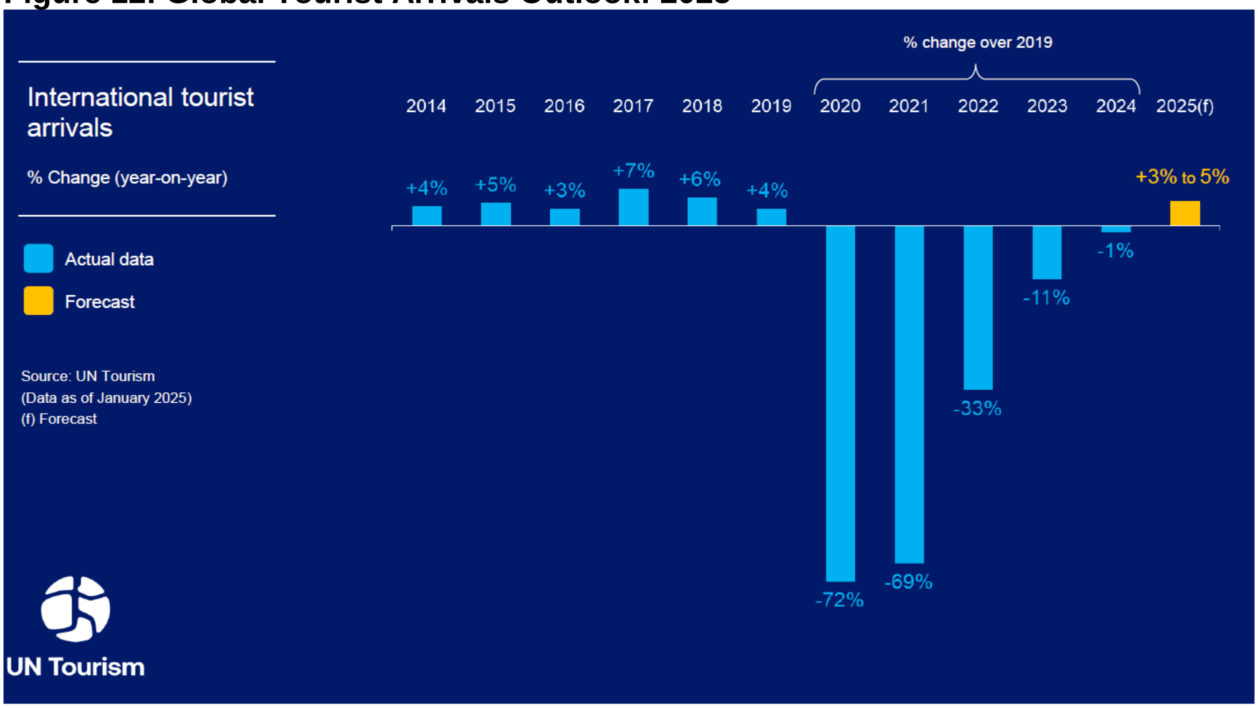
	World	Europe	Asia and the Pacific	Americas	Africa	Middle East
2024 compared to 2023	10,7%	5,5%	32,9%	6,7%	12,2%	1,4%
2024 compared to 2019	-1,4%	0,7%	-12,9%	-2,6%	7,0%	32,4%

Source: UN Tourism World Tourism Barometer, January 2025

6.3 Global Tourist Arrivals Outlook: 2025

Forecasts for 2025 from UN Tourism highlight that, global tourist arrivals are expected to grow between 3% to 5% in 2025 compared to 2024 which is indicated in figure 12 below. UN Tourism further indicates that the increase would be driven by strong demand from large source markets, which include a continued recovery in Asia and the Pacific regions (UN Tourism Barometer, 2025). Additionally, the 2025 projection assumes that global economic conditions would remain favourable, with inflation continuing to decrease, particularly in services, and geopolitical conflicts not intensifying (UN Tourism, 2025).

Figure 12: Global Tourist Arrivals Outlook: 2025



Source: UN Tourism World Tourism Barometer, January 2025

Some of the concerning geo-political conflicts that could affect tourism in 2025 include:

- **Ukraine-Russia Conflict**: If the conflict between Russia and Ukraine continues or escalates in 2025, it could discourage travel to certain regions of Europe and increase the risk for tourists traveling to Eastern Europe. (UN Tourism Barometer, 2025);
- **Middle East Conflicts**: Ongoing instability in regions like Syria, Yemen, and the broader Middle East can have a significant impact on tourism. Countries like Israel, Lebanon, and parts of Egypt and Jordan could see reduced tourist numbers, especially in areas near conflict zones (Travel and Tour, 2024);
- **Ongoing USA travel bans and heightened security measures** could negatively affect international tourism, particularly by discouraging visitors from Middle Eastern, North African, and predominantly Muslim countries. These policies may create perceptions of exclusion and lead tourists to avoid the USA, impacting the tourism sector (Galloway, 2025).

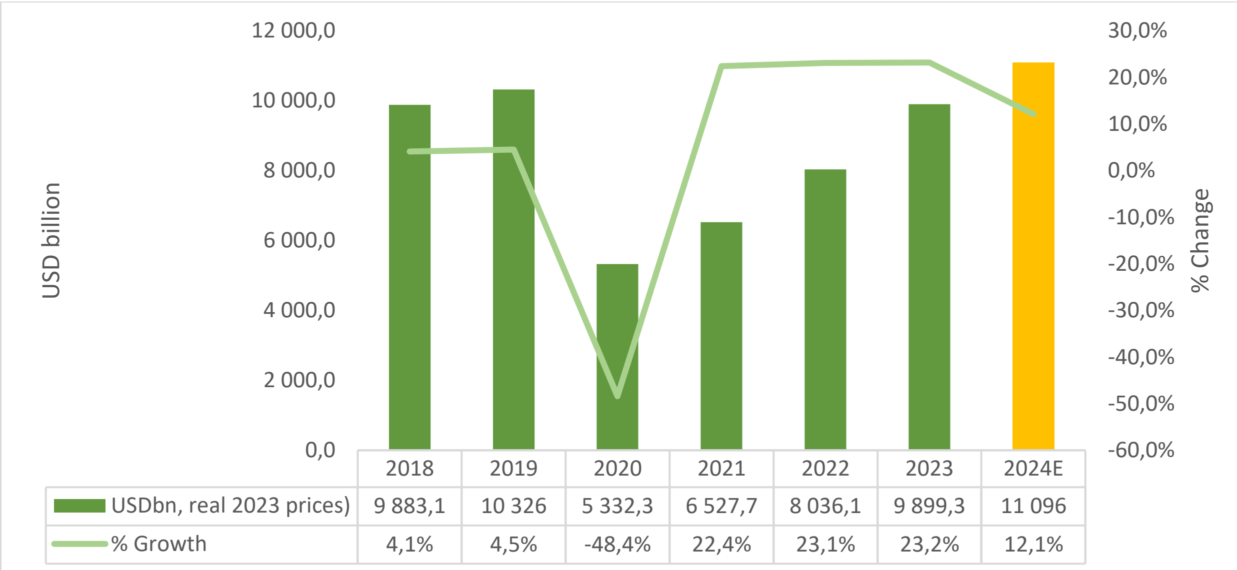
6.4 Global Economic Value of Tourism

This section of the report provides the value of the travel and tourism sector to the global economy by analysing key indicators, which include the contribution of tourism to the global Gross Domestic Product (GDP) and global employment for the period 2018-2023 and estimates for year 2024. The estimated figures reported in this section were primarily sourced from the WTTC 2024 report.

Travel and Tourism Sector's Total Contribution to Gross Domestic Product: 2018-2023 and 2024 Estimates

According to WTTC figures released in 2024, the total contribution of the travel and tourism sector to the global economy was about US$8 036,1 billion in 2022 (7,5% of global GDP), which went up to US$9 899,3 billion in 2023 (9,1% of global GDP) as indicated in the figure below. Estimates for 2024 indicate that the total contribution to the total global economy will increase to US$11 096 billion (10,0% of global GDP), which is a growth of 12,1%.

Figure 13: Travel and Tourism Sector Total Contribution to GDP 2018-2023 and 2024 Estimates



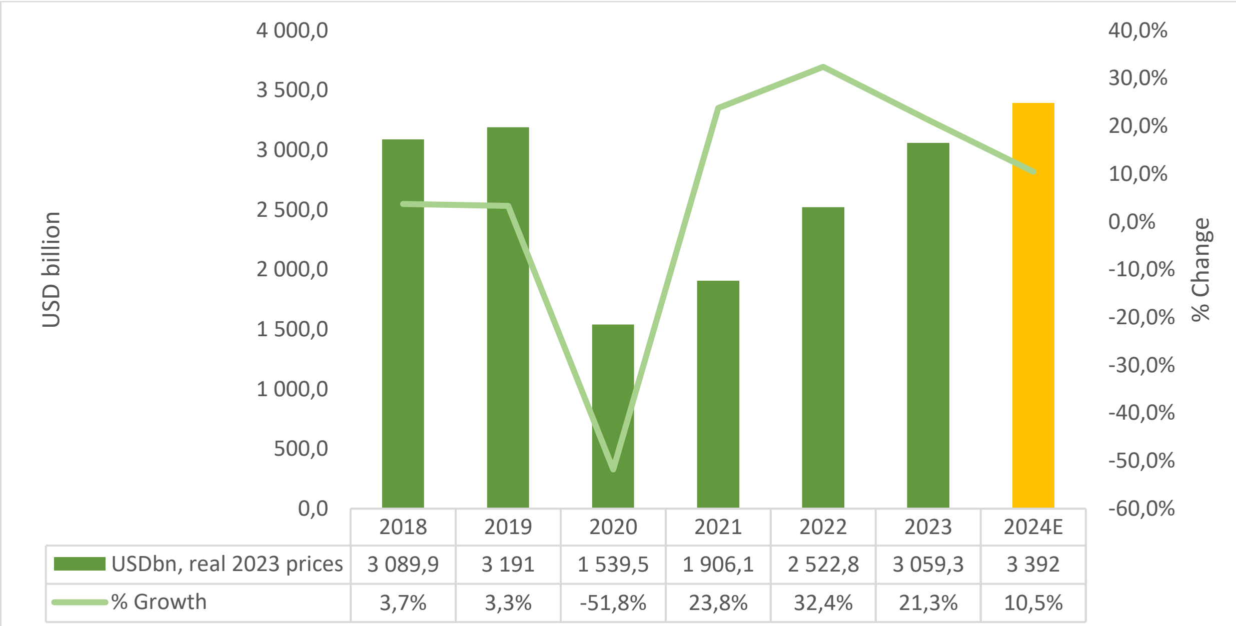
	2018	2019	2020	2021	2022	2023	2024E
Share of GDP - Relative contribution (% whole economy)	10,2%	10,4%	5,5%	6,3%	7,5%	9,1%	10,0%

Source: WTTC T&T Economic Impact 2024 World Report

Travel and Tourism Sector's Direct Contribution to Gross Domestic Product: 2018-2023 and 2024 Estimates

The figure below shows that the travel and tourism sector's direct contribution to GDP globally was about US$2 522,8 billion (2,3% of global GDP) in 2022 and increased to US$ 3 059,3 billion (2,8% of GDP) in 2023. Estimates for 2024 indicate that the direct contribution to the total global economy will increase to US$3 392 billion (3,0% of global GDP) which is a growth of 10,5%

Figure 14: Travel and Tourism Sector Direct Contribution to GDP 2018-2023 and 2024 Estimates



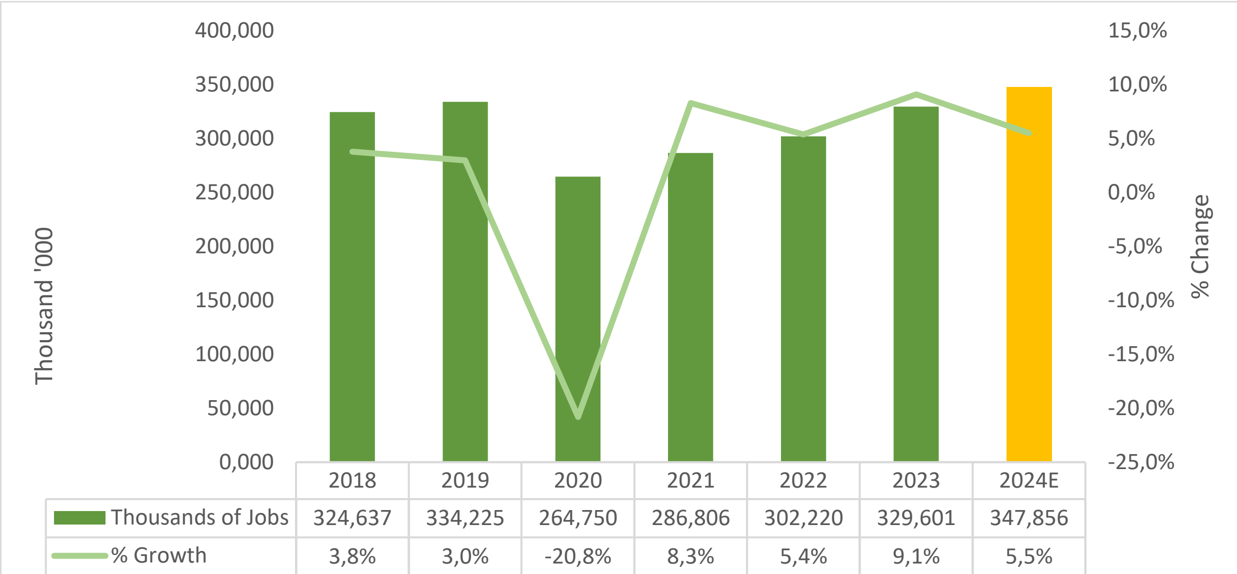
	2018	2019	2020	2021	2022	2023	2024E
Share of GDP - Relative contribution (% whole economy)	3,2%	3,2%	1,6%	1,8%	2,3%	2,8%	3,0%

Source: WTTC T&T Economic Impact 2024 World Report

Travel and Tourism Sector's Total Contribution to Employment: 2018-2023 and 2024 Estimates

The figure below indicates that globally, the total contribution of the travel and tourism sector to employment was about 302,220,000 jobs (9,3% of total employment) in 2022, increasing to 329,601,000 jobs in 2023 (10,0% of total employment). The travel and tourism sector's total contribution to employment increased by 9,1% during this period. Estimates for 2024 highlight that the total contribution of the travel and tourism sector to employment was about 347,856,000 jobs (10,4% of total employment), which is a growth of 5,5%.

Figure 15: Travel and Tourism Sector Total Contribution to Employment: 2018-2023 and 2024 Estimates



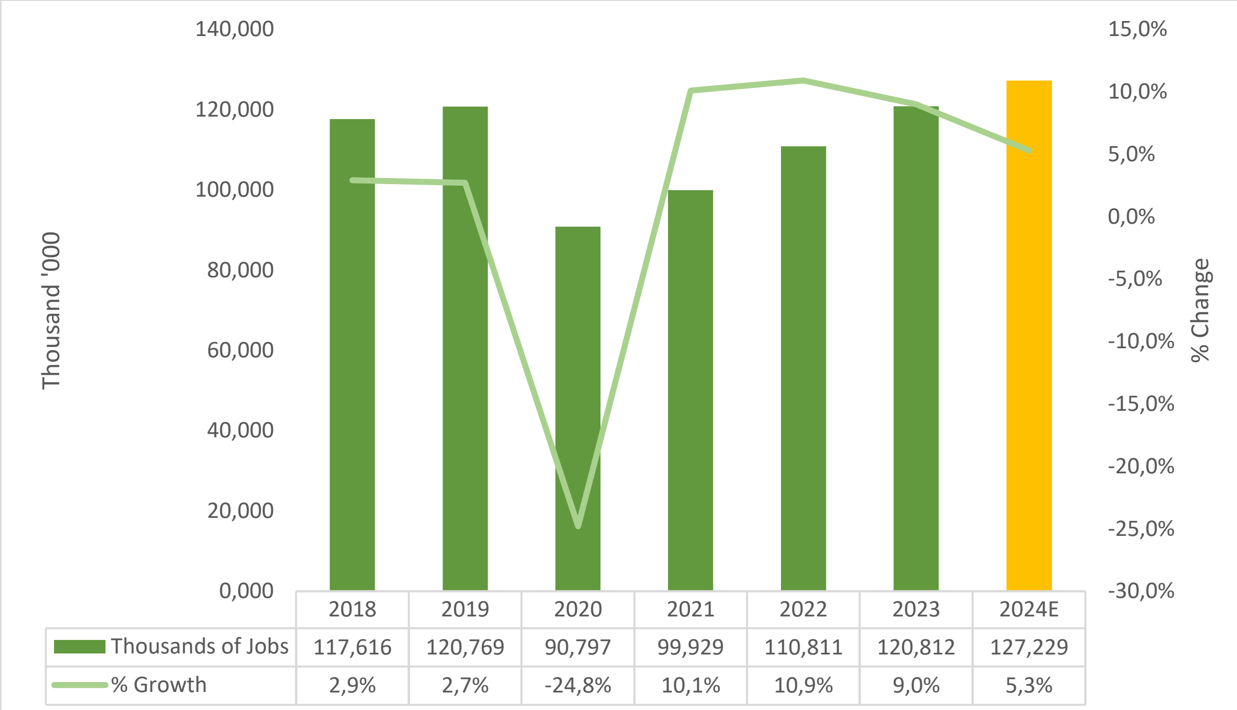
	2018	2019	2020	2021	2022	2023	2024E
Share of GDP - Relative contribution (% whole economy)	10,3%	10,5%	8,5%	9,1%	9,3%	10,0%	10,4%

Source: WTTC T&T Economic Impact 2024 World Report

Travel and Tourism Sector's Direct Contribution to Employment: 2018-2023 and 2024 Estimates

The figure below shows that the travel and tourism sector directly generated about 110,811,000 jobs in 2022, contributing to about 3,4% of total employment globally, and these jobs increased to 120,812,000 (3,7% of total employment globally) in 2023. Estimates for 2024 show that the direct contribution to the travel and tourism sector to employment was about 127,229,000 jobs (3,8% of total employment) which is a growth of 5,3%.

Figure 16: Travel and Tourism Sector Direct Contribution to Employment: 2018-2023 and 2024 Estimates



	2018	2019	2020	2021	2022	2023	2024E
Share of GDP - Relative contribution (% whole economy)	3,7%	3,8%	2,9%	3,2%	3,4%	3,7%	3,8%

Source: WTTC T&T Economic Impact 2023 World Report

6.5 Global Tourism Related Industry Performance

This section provides an overview of the global tourism-related industries' performance. Data for this section was sourced from Euromonitor International, UN Tourism Barometer for December 2024 (str occupancy rate), International Airports Transport Association (IATA) and OAG. This section provides an overview of the global tourism-related industries performance, focusing mainly on the global hotels and passenger's movement as well as car rental.

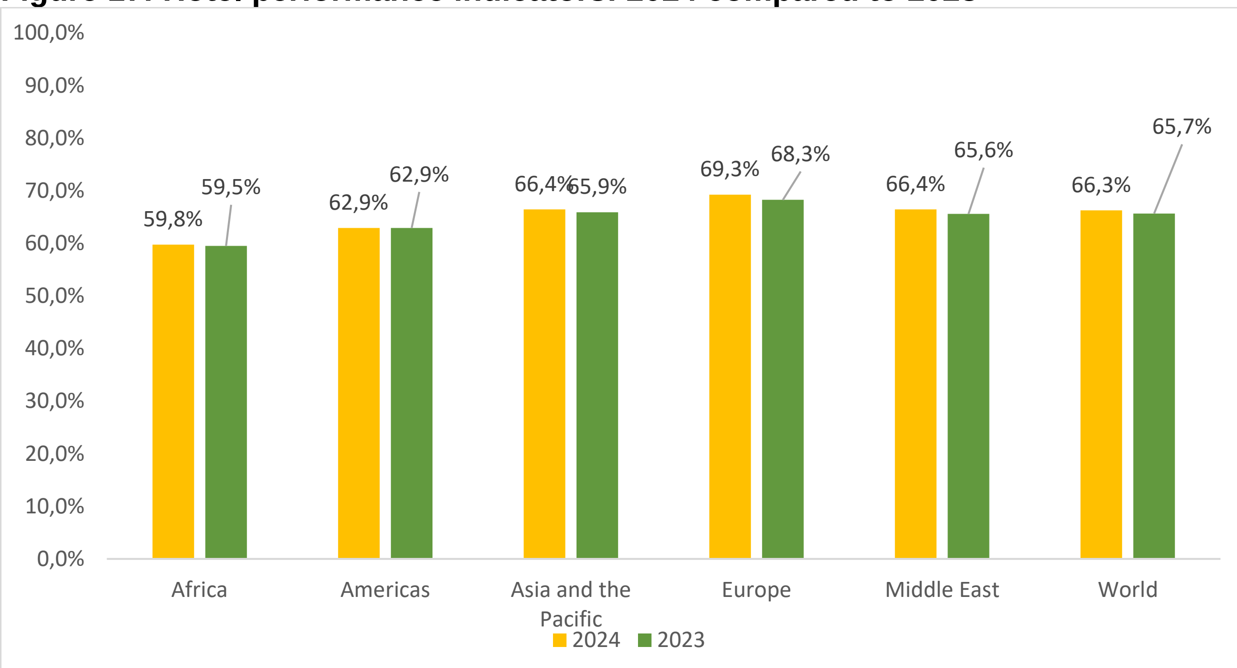
Global Hotel Industry Performance

The performance of the hotel industry during 2024 compared to 2023 is presented below. The data is sourced from UN Tourism's Tourism Tracker dashboard.

Global Hotel Industry Performance: 2023 compared to 2024

The global performance of the hotel industry by region for 2024 and 2023 is indicated in the table below.

Figure 17: Hotel performance indicators: 2024 compared to 2023



Source: https://www.unwto.org/tourism-data/un-tourism-tracker

Average occupancy rate increased for all regions in 2024 compared to 2023 with Europe having the highest occupancy (69.3%) followed by Middle East, and Asia and the Pacific, with both having an average occupancy rate of 66.4%.

Air Transport Performance

This section of the report provides the performance of the global aviation industry for the period 2024 compared to 2023 and data was sourced from IATA reports.

Air transport performance: 2024 compared to 2023

According to IATA data, RPK increased by 10,4% in in 2024, total ASK increase by 8,7% and total PLF increased to 1,3% during 2024 when compared to 2023. All aviation indicators for domestic and international experienced an increase.

Table 16: Air transport performance indicators 2024 compared to 2023

Total Market	RPK	ASK	PLF
	Year on year % Change	Year on year % Change	Year on year% Change
	2024	2024	2024
International	13,6%	12,8%	0,5%
Domestic	5,7%	2,5%	2,5%
Total Market	**10,4%**	**8,7%**	1,3%

RPK – Revenue Passenger Kilometres, *Source: IATA. Air Passenger Market Analysis 2023-24*
ASK – Available Seats Kilometres,
PLF – Passenger Load Factor.

Global Top 10 Air Transport Performance 2024 compared to 2023

The table below provides the top 10 airlines by total ASKs sourced from OAG reports. In 2024, the top 10 airlines by ASK show varied performance, with United Airlines (UA) leading in terms of total volume, reaching 507.1 billion compared to 474.55 billion in 2023, indicating a growth of 6.9%. Following closely is American Airlines (AA) at 475.44 billion, up by 5.8% from the previous year, and Delta Air Lines (DL) at 467.66 billion, indicating a 5.9% increase. United Airlines maintained the highest volume, while China Eastern Airlines led in growth, showing a strong performance in 2024 across various global regions.

Table 17: ASKs Global (Available Seat Kilometres) Growth Year-on-Year

Top 10	Airline	Airline Name	2023	2024	Growth 24 vs 23
1	UA	United Airlines	474,553,710,096	507,096,590,281	6.9%
2	AA	American Airlines	449,494,822,474	475,437,117,209	5.8%
3	DL	Delta Air Lines	441,738,781,160	467,659,343,466	5.9%
4	EK	Emirates	340,231,012,875	361,964,771,486	6.4%
5	WN	Southwest Airlines	275,798,191,678	286,663,356,537	3.9%
6	FR	Ryanair	239,079,871,666	263,878,610,195	10.4%
7	QR	Qatar Airways	234,814,052,555	257,228,169,594	9.5%
8	CZ	China Southern Airlines	216,663,598,427	246,183,620,321	13.6%
9	TK	Turkish Airlines	214,533,503,138	229,986,280,014	7.2%
10	MU	China Eastern Airlines	184,391,671,936	223,294,398,370	21.1%

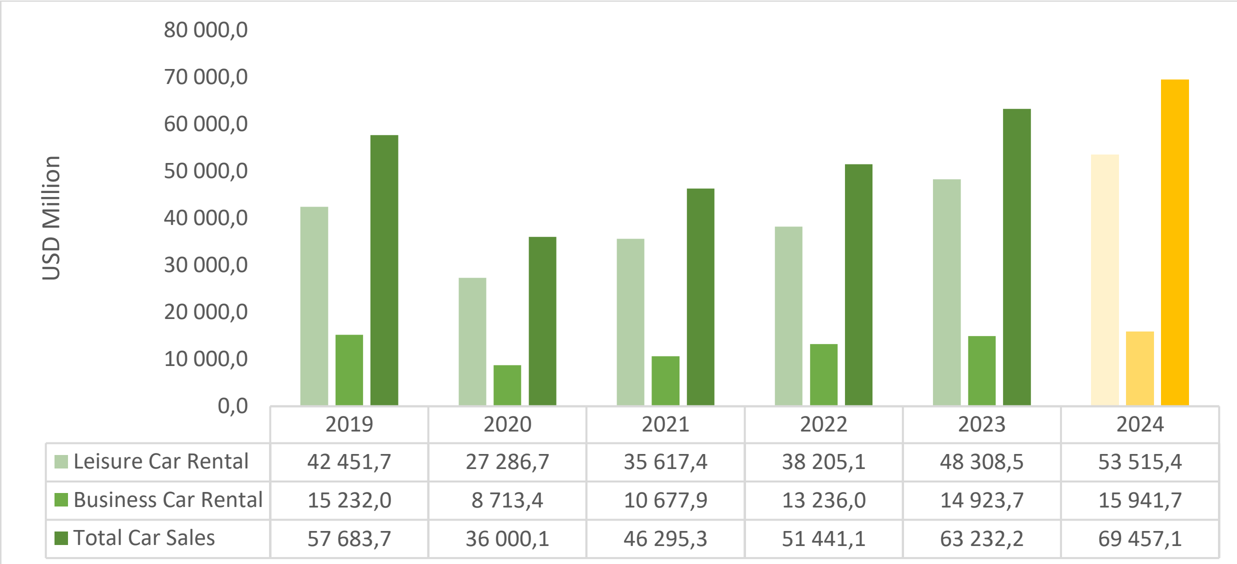
Source OAG Report February 2025

The top 10 market results above for the Available Seat Kilometres (ASK) indicated that China Eastern Airlines had the highest growth of 21.1% as it increased from 217 billion in 2023 to 246 billion in 2024, followed by China Southern Airlines (13.6%), Ryanair (10.4%), Qatar Airways (9.5%) and Turkish Airways with 7.2%. Southwest Airlines reported the lowest growth of 3.9% in the top 10 Global ASKS for 2024 period compared to 2023.

Global Car Rental Performance

Car rental is an important industry for the tourism sector since tourists often use car rentals to travel within the countries globally. Figure below indicates car rental sales globally for 2019 to 2024 period. Car rental sales decreased from USD57 683,7million in 2019 to USD36 000,1 million in 2020, which was a decline of -37,6% (USD -21 683,6 million). Car rental sales increased by 28,61% (USD 10 295,2million) in 2021 compared to 2020, moving from USD36 000,1 million in 2020 to USD46 295,3 million in 2021. Comparing car rental sales for 2022 with 2021, there was an increase of 11,1% reported from USD46 295,3 million in 2021 to USD51 441,1 million (USD 5 145,8 million). Car rental sales increased from USD57 51 441,1 in 2022 to USD63 232,2 million in 2023, Comparing car rental sales for 2024 with 2023, there was an increase of 9,8% recorded, from USD63 232,2 million in 2023 to USD69 457,1 million (9,8%, USD 6 224,9 million).

Figure 18: Global Car Rental Performance: 2019-2024



	2019	2020	2021	2022	2023	2024
Total Car Sales	57 683,7	36 000,1	46 295,3	51 441,1	63 232,2	69 457,1
% Growth		-37,6%	28,6%	11,1%	22,9%	9,8%

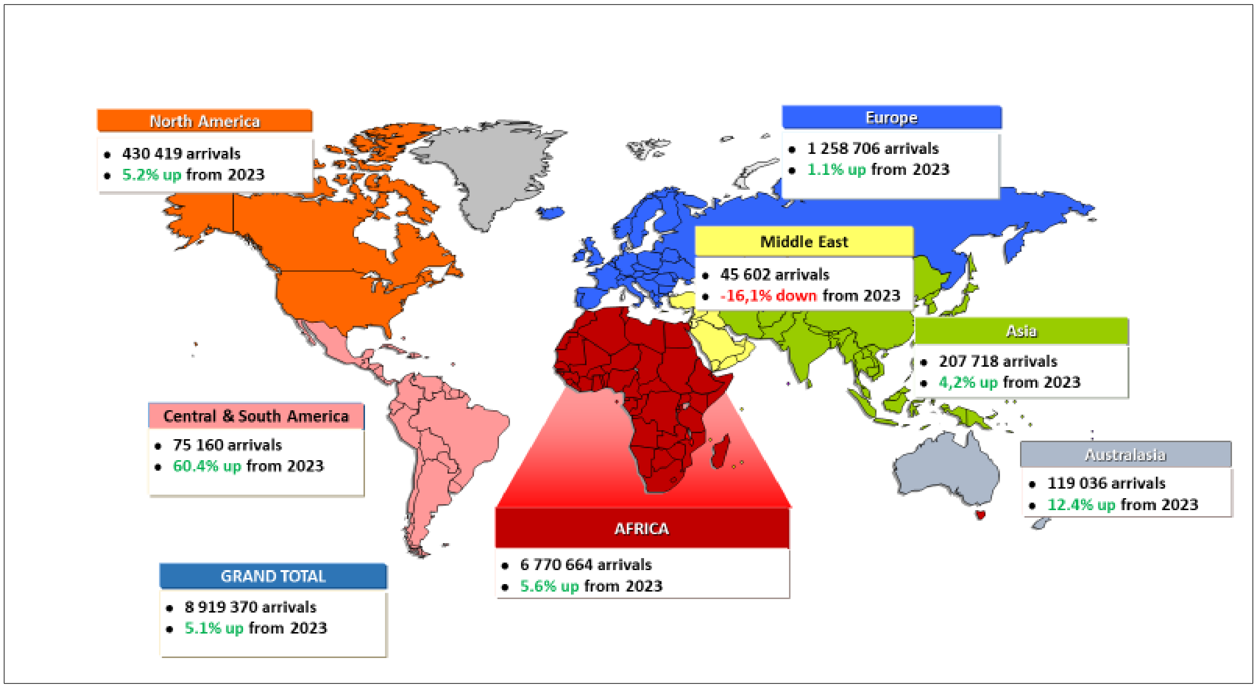
Source: Euromonitor, data cuts, 2024.

6.6 SOUTH AFRICA'S TOURIST ARRIVALS: 2019-2024

South African Tourist Arrivals Performance: 2024 compared to 2023

Total tourist arrivals went up by 5,1% for 2024 compared to 2023. This was an increase from a total of 8 483 333 tourist arrivals in 2023 to 8 919 370 (436 037) during the same period in 2024. Central and South America (60,4%) had the highest increase followed by Australasia (12,4%), North America (5,2%), Asia (4,2%) and Europe (1,1%) when comparing 2024 to 2023. Middle East had a decline of -16,1% for the period under review. Tourist arrivals from Africa increased by 5,6%, from a total of 6 410 392 in 2023 to a total of 6 770 664 during 2024.

Figure 19: Total Tourist Arrivals by Region 2024 compared to 2023



Source: Stats SA International Tourism Report: December 2024 and data cuts.

Total Tourist Arrivals January-December 2019 to January-December 2024

Tourist arrivals for January-December 2019-2024 period are indicated in figure 20 below. Total tourist arrivals went up by 5,1% (436 037) during January-December 2024 compared to the same period in 2023. However, the tourist arrivals during January to December 2024 were at a level of -12,8% compared to arrivals recorded during pre-COVID-19 period (January-December 2019).

Figure 20: Total Tourist Arrivals January-December 2019 to January-December 2024

	Jan-Dec 2019	Jan-Dec 2020	Jan-Dec 2021	Jan-Dec 2022	Jan-Dec 2023	Jan-Dec 2024	Jan-Dec 2024 compared to Jan-Dec 2019
Tourist Arrivals	10 228 593	2 802 320	2 255 699	5 698 062	8 483 333	8 919 370	
Difference	(243 512)	(7 426 273)	(546 621)	3 442 363	2 785 271	436 037	(1 309 223)
% Growth	-2,3%	-72,6%	-19,5%	152,6%	48,9%	5,1%	-12,8%

Source: Stats SA International Tourism Report: December 2024 and data cuts.

Total Tourist Arrivals by Region January-December 2019 to January-December 2024

Table 18 below shows that total tourist arrivals from overseas markets increased by 3,7% (76 328). Central & South America (60,4%) recorded the highest increase followed by Australasia (12,4%), North America (5,2%), Asia (4,2%) and Europe with 1,1%. The Middle East region reported a decline of -16,1% for the same period under review.

In Central and South America, Brazil had the highest increase in volume (24 183; 94,2%) for the same period under review. In Australasia, Australia reported the highest increase in tourist arrivals by volume (12 294; 14,3%). In Asia, China recorded the highest increase in volume (4 254; 11,4%). In North America, United States of America reported the highest increase in volume (18 387; 5,2%). In Europe, Germany led with the highest increase in volume (9 733; 4,0%) for the period under review.

In the Middle East region, Israel had the largest drop in tourist numbers during January-December 2024, experiencing a decline of -12 540 (-62,9%) compared to the same period in 2023 and this could be related to the ongoing conflict between Israel and Palestine.

Tourist arrivals from Africa increased by 5,6% (360 272) during the same period under review and this region remained the main source of tourist arrivals to the country, accounting for 75,9% (6 770 664) of total tourist arrivals during January-December 2024.

In terms of volume, the increase recorded from the African continent was driven by a positive growth (250 714; 18,7%) from Mozambique followed by Eswatini (108 369; 14,8%) and Zimbabwe (76 320; 3,6%). Comparing total tourist arrivals for January-December 2024 to January-December 2019, there was a decline of -17,1% and all regions also showed a decline in growth for the same period under review.

Table 18: January-December 2024 Compared to January-December 2023 and 2019

	January-December 2023	January-December 2024	2024 compared to 2023 Diff	2024 compared to 2023 %	January-December 2019	2024 compared to 2019 Diff	2024 compared to 2019 %
EUROPE	1 244 877	1 258 706	13 829	1,1%	1 556 452	-297 746	-19,1%
NORTH AMERICA	409 031	430 419	21 388	5,2%	440 271	-9 852	-2,2%
CENTRAL & SOUTH AMERICA	46 870	75 160	28 290	60,4%	120 380	-45 220	-37,6%
AUSTRALASIA	105 888	119 036	13 148	12,4%	128 153	-9 117	-7,1%
MIDDLE EAST	54 339	45 602	-8 737	-16,1%	55 532	-9 930	-17,9%
ASIA	199 308	207 718	8 410	4,2%	311 371	-103 653	-33,3%
TOTAL OVERSEAS	**2 060 313**	**2 136 641**	**76 328**	**3,7%**	**2 612 159**	**-475 518**	**-18,2%**
TOTAL AFRICA	**6 410 392**	**6 770 664**	**360 272**	**5,6%**	**7 600 843**	**-830 179**	**-10,9%**
Unspecified	12 628	12 065	-563	-4,5%	15 591	-3 526	-22,6%
GRAND TOTAL	**8 483 333**	**8 919 370**	**436 037**	**5,1%**	**10 228 593**	**-1 309 223**	**-12,8%**

Source: Stats SA International Tourism Report: December 2024 and data cuts.

Table below provides the rankings of the top ten African source markets for the period January-December 2024 compared to January-December 2023. Most of the top ten

African source markets remained in the same position except for Malawi which moved up from 8th position in 2023 to 7th position in 2024. Zambia dropped from 7th position in 2023 to 8th position in 2024. Mozambique recorded the highest increase of 18,7% followed by Malawi (17,9%) and Eswatini (14,8%). Lesotho and Angola recorded a negative growth rate of -16,3% and -3,7% respectively for the period under review.

Table 19: South Africa's Top 10 African Source Markets: January-December 2024 vs. January-December 2023

Country	Rank: January-December 2024	Tourist Arrivals January-December 2024	Rank: January-December 2023	Tourist Arrivals January-December 2023	% Change
Zimbabwe	1	2 183 260	1	2 106 940	3,6%
Mozambique	2	1 591 751	2	1 341 037	18,7%
Lesotho	3	974 369	3	1 163 826	-16,3%
Eswatini	4	842 318	4	733 949	14,8%
Botswana	5	395 965	5	363 025	9,1%
Namibia	6	164 716	6	160 078	2,9%
Malawi	7	163 726	8	138 918	17,9%
Zambia	8	154 921	7	145 244	6,7%
Kenya	9	47 852	9	42 403	12,9%
Angola	10	37 811	10	39 265	-3,7%

Source: Stats SA International Tourism Report: December 2024 and data cuts.

Table 20 below provides rankings of the top ten overseas source markets. Comparing January-December 2024 with January-December 2023, most of the top ten overseas source markets remained in the same position during January-December 2024 compared to January-December 2023 except Brazil, which replaced Belgium in the top 10 list of markets. The number of tourists coming from Brazil increased by 94,2%, causing the country to improve its 16th position in 2023 by joining the top ten list of markets in 10th position in 2024. The rise in Brazilian tourists since January 2024 might be linked to the resumption of direct flights between Brazil and South Africa. With regard to volume, USA was the main source market from overseas markets, showing a growth of 5,2%.

Table 20: South Africa's Top 10 Overseas Source Markets: January-December 2024 vs. January-December 2023

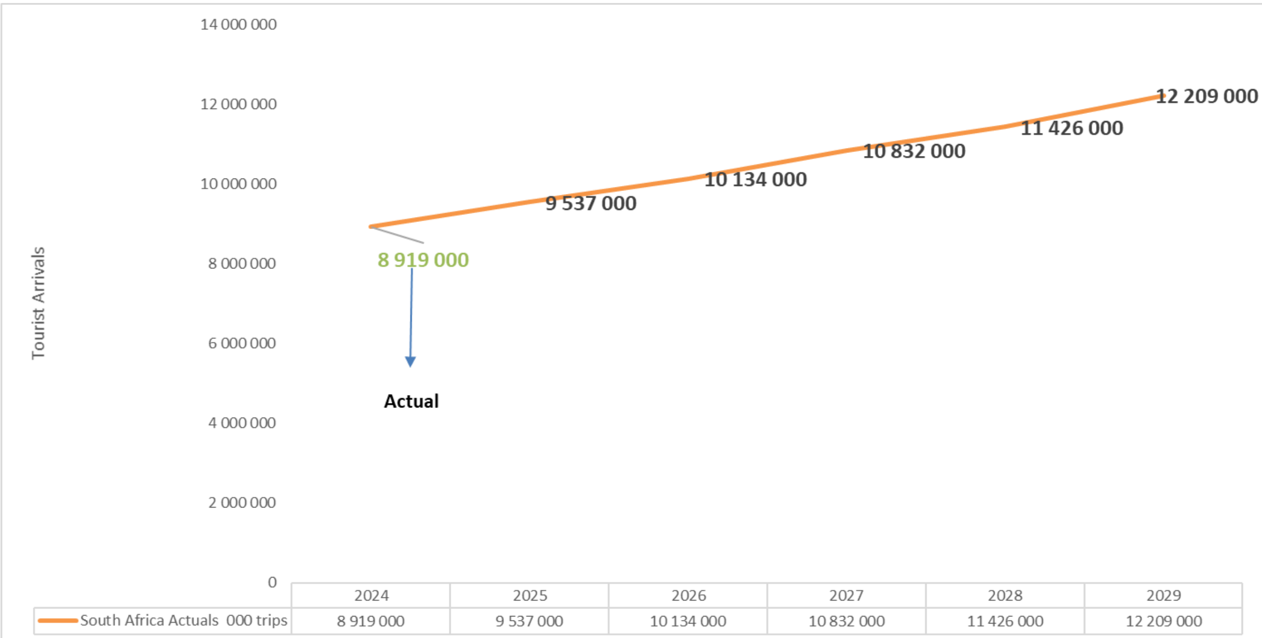
Country	Rank: January-December 2024	Tourist Arrivals January-December 2024	Rank: January-December 2023	Tourist Arrivals January-December 2023	% Change
USA	1	372 362	2	353 975	5,2%
UK	2	349 883	1	356 160	-1,8%
Germany	3	254 992	3	245 259	4,0%
The Netherlands	4	132 422	4	131 371	0,8%
France	5	125 823	5	119 974	4,9%
Australia	6	98 544	6	86 250	14,3%
India	7	75 541	7	79 774	-5,3%
Canada	8	58 057	8	55 056	5,5%
Italy	9	50 780	9	52 091	-2,5%
Brazil	10	49 855	16	25 672	94,2%

Source: Stats SA International Tourism Report: December 2024 and data cuts.

6.7 Tourist Arrival Forecasts for South Africa: 2025-2029

The figure below provides South Africa's tourist arrivals forecasts for 2025-2029. The data was sourced from Euromonitor International's forecast model. The forecasts are based on historical data and assume that all conditions remain constant.

Figure 21: South Africa's Forecasted Tourist Arrivals for 2025-2029



	2025 vs 2024	2026 vs 2025	2027 vs 2026	2028 vs 2027	2029 vs 2028
% Change	6,3%	6,9%	5,5%	6,9%	6,4%

Source: Euromonitor, 2025.

The figure above indicates that tourist arrivals is projected to increase by 6,3% in 2025 compared to 2024. The forecasts in figure 21 indicate that tourist arrivals for South Africa are expected to grow beyond pre-Covid-19 levels (10 228 5930) in 2027 (10 832 000).

Due to recent political developments, the relationship between South Africa and the United States has become increasingly volatile. President Trump has cut aid to South Africa, citing the Expropriation Act of 2025, which he views as unjustly targeting white Afrikaners, whom he now perceives as oppressed by the South African government. Additionally, President Trump's social media posts have suggested that white Afrikaners in South Africa could be allowed to move to the U.S. as refugees. In March 2025, tensions escalated further when South Africa's Ambassador to the U.S. was expelled after criticizing the American government. These deteriorating relations could have significant consequences for tourism between the two countries. Some of the impact is indicated below:

- **Decreased American Tourist Arrivals**

  If political tensions between the USA and South Africa escalate, American tourists may feel less inclined to visit South Africa due to concerns over safety or political instability. A decline in American tourists would directly impact tourism revenue, as the USA is a significant source market for South Africa's tourism sector as the country is ranked number 1 for South Africa's overseas markets (indicated in top to countries analysis).

- **Travel Advisory Impact**

  If the U.S. government issues travel advisories warning against visiting South Africa due to perceived risks (e.g., political unrest, safety concerns, or diplomatic issues), it could also lead to a reduction in American tourist arrivals. Travel advisories can have a strong influence on tourist decisions, as safety is often a top priority.

- **Business Events and Conventions**

  Negative political relations may affect business events, conferences, or conventions hosted in South Africa. If American companies or organizations perceive strained relations as a deterrent, they might choose to hold events in other countries. This would impact South Africa's meetings, incentives, conferences, and exhibitions (MICE) within the tourism sector.

- **Tourism Partnerships and Marketing**

  South Africa's efforts to promote tourism in the U.S. could also be hindered by strained political ties. Joint tourism campaigns or partnerships between the two countries may be less effective, potentially leading to a decline in promotional activities targeting American tourists. Additionally, reduced diplomatic cooperation could limit tourism-focused collaborations, like joint visa initiatives or travel packages.

Overall, while tourism is often resilient to political tension, a prolonged or intensified negative relationship between the USA and South Africa could lead to reduced visitor numbers, particularly from the USA, and this could impact the broader tourism landscape.

6.8 PERFORMANCE OF SOUTH AFRICA'S TOURISM RELATED INDUSTRIES

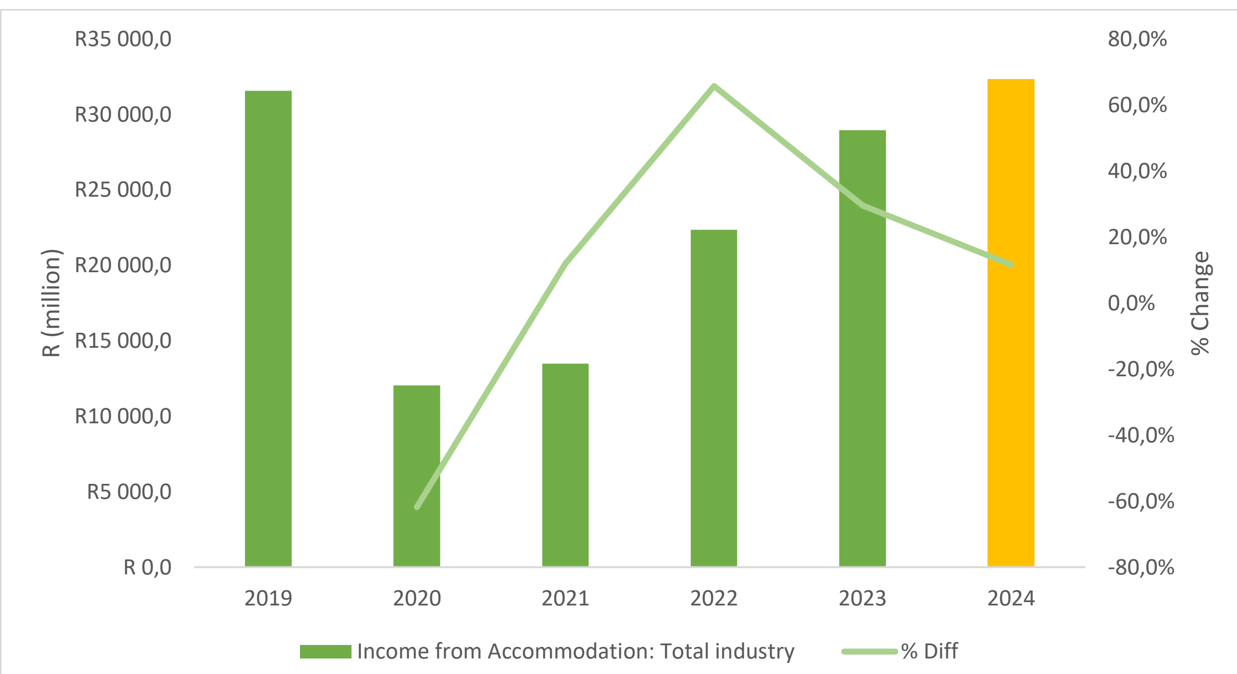
Many industries are economically dependent on the tourism sector. Industries that are directly affected by the tourism sector include amongst others; accommodation, restaurants, transportation, amusements, and retail trade. This chapter of the report focuses on the performance of some of the tourism-related industries in South Africa. The performance of these industries is key to the tourism sector's contribution to GDP and total employment.

Accommodation Industry: 2019-2024 (Current Prices)

The following sub-section of the report focuses on the performance of the accommodation industry by analysing key indicators such as total income from accommodation and occupancy rates. The data is sourced from Stats SA Tourist Accommodation report and data cuts.

Figure below indicates income from accommodation excluding restaurants and bar sales for the period 2019-2024. Total income for 2024 increased by 2,5% compared to 2019, pre-COVID period.

Figure 22: Income from Accommodation: 2019-2024



	2019	2020	2021	2022	2023	2024	2024 compared to 2019
Income from Accommodation: Total industry	R31 555,4	R12 051,3	R13 492,1	R22 359,9	R28 961,9	R32 332,6	
Diff.		-R19 504,1	R1 440,8	R8 867,8	R6 602,0	R3 370,7	R777,2
% Diff		-61,8%	12,0%	65,7%	29,5%	11,6%	2,5%

Source: Stats SA: Accommodation December 2024 data cuts.

The total income from the accommodation industry is provided in table below. The total income from the accommodation industry showed a growth of 11,6% from an amount of R28 961,9 million in 2023 to R32 332,6 million in 2024. When 2024 figures are compared to 2023, all categories of accommodation experienced an increase in income. Caravan parks and camp sites had the highest growth (16,7%), followed by Other accommodation (15,8%), Hotels (9,8%) and Guest houses and guest farms with 1,2%. Other category includes lodges, bed-and-breakfast, self-catering and 'other' establishments not classified. Total income for 2024 increased by 2,5% compared to 2019, pre-COVID period. Comparing 2024 to 2019, Caravan parks and camp sites (175,7%) and Hotels (8,0%) increased in growth however, Guest houses and guest farms and Other accommodation experienced a decline of -13,0% and -7,3%.

Table 21: Income from Accommodation: 2024 compared to 2023

Type of Accommodation	2024	2023	% Change 2024 vs 2023	2019	% Change 2024 vs 2019
Hotels (R million)	R18 530,1	R16 872,8	9,8%	R17 160,7	8,0%
Caravan parks and camping sites (R million)	R838,6	R718,6	16,7%	R304,2	175,7%
Guest houses and guest farms (R million)	R1 430,4	R1 413,4	1,2%	R1 644,1	-13,0%
Other accommodation (R million)	R11 533,5	R9 957,1	15,8%	R12 446,4	-7,3%
Total Industry (R million)	**R32 332,6**	**R28 961,9**	**11,6%**	**R31 555,4**	**2,5%**

Source: Stats SA: Accommodation December 2024 data cuts.

Accommodation Industry Occupancy Rate: 2024 compared to 2023

The table below shows average occupancy rates by accommodation type from 2024 compared to 2023. For 2024, there was a slight increase in the average occupancy rate for the total accommodation industry, an improvement from 35,7% in 2023 to 36,7% in

2024. Total average occupancy rate for 2024 declined compared to 2019, pre-COVID period.

Table 22: Occupancy Rate (%)2024 compared to 2023

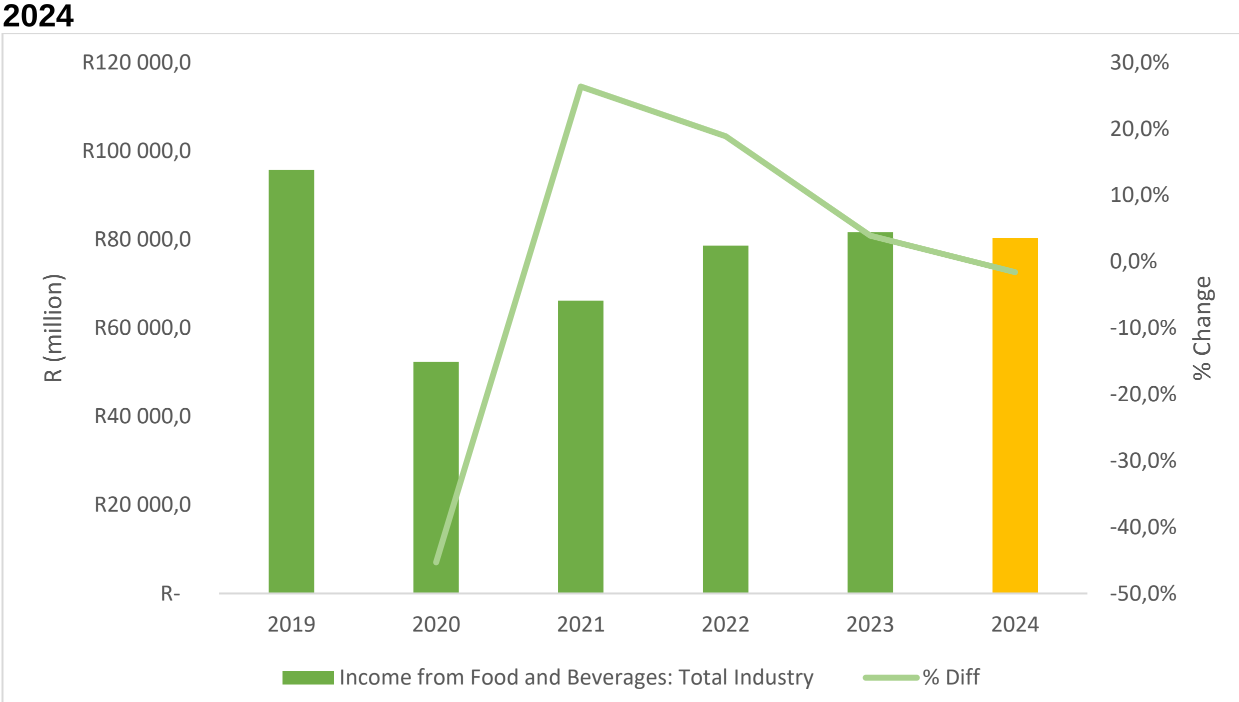
Occupancy Rates	2024	2023	2019
Hotels	43,6	42,7	48,7
Caravan parks and camping sites	34,4	32,7	33,5
Guest houses and guest farms	20,9	22,3	37,5
Other accommodation	29,9	28,0	42,0
Total Industry	**36,7**	**35,7**	**44,6**

Source: Stats SA: Accommodation December 2024 data cuts.

Food and Beverages Industry: 2019-2024 (Constant Prices)

The performance of the food and beverages industry for 2019-2024 period is provided in this section. Figure 23 below indicates income from food and beverages for the period 2019-2024. Total income from food and beverages for 2024 declined by 16,1% compared to 2019, pre-COVID period.

Figure 23: Total Income by Type of Food and Beverages Industry: Annually 2019-2024



	2019	2020	2021	2022	2023	2024	2024 compared to 2019
Income from Food and Beverages: Total Industry	R 95 733,2	R 52 344,5	R 66 141,3	R 78 610,4	R 81 663,8	R 80 346,9	
Diff.		-R 43 388,7	R 13 796,8	R 12 469,1	R 3 053,4	-R 1 316,9	-R 15 386,3
% Diff		-45,3%	26,4%	18,9%	3,9%	-1,6%	-16,1%

Source: Stats SA Food and Beverages December 2024 data cuts.

Food and Beverages Industry Income: 2024 compared to 2023

The total income of the food and beverages industry for 2024 period compared to last year is shown in table below. The total income of the food and beverages industry was about R80 346,9 million in 2024, showing a decrease of -1,6% when compared to income of about R81 663,8 million during 2023. Most categories of food and beverages industry experienced a growth except for Restaurants and coffee shops (-5,0%). The highest positive growth recorded was for Catering services (4,8%) followed by Take-away and fast food outlets (0,8%).

Table 23: Total income by type of food and beverages industry: 2024 compared to 2023. *(Income at constant 2015 prices for the latest six months by type of enterprise)*

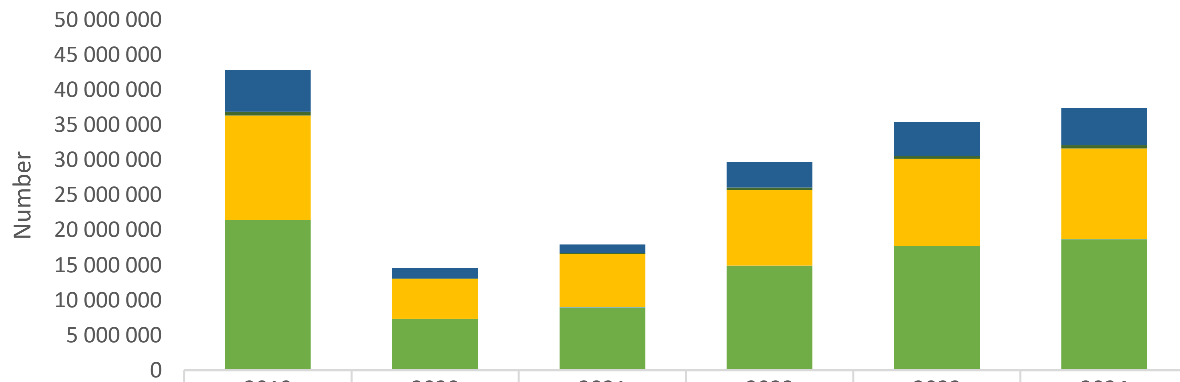
	Restaurants and coffee shops	Take-away and fast food outlets	Catering services	Total Industry
2024	R38 489,6	R31 890,2	R9 967,1	R80 346,9
2023	R40 502,6	R31 650,7	R9 510,5	R81 663,8
% Change	-5,0%	0,8%	4,8%	-1,6%

Source: Stats SA Food and Beverages December 2024 data cuts.

Airline Industry: Passengers Movement: 2019-2024

This section provides an overview of the airline industry performance at ACSA airports. Data for this section was sourced from Airports Company South Africa for 2019-2024 period. Figure 24 below is providing passenger arrivals movement during 2019-2024 period. The total passenger arrivals movement recorded during 2024 declined by -12,7% when compared to 2019, pre-COVID. This was a decline from 21 429 817 in 2019 to 18 701 088 in 2024.

Figure 24: Passenger Arrivals Movement: 2019-2024



	2019	2020	2021	2022	2023	2024
International	5 925 407	1 478 090	1 208 707	3 612 443	4 835 220	5 262 510
Regional	551 093	108 902	148 110	338 100	428 054	489 248
Domestic	14 896 859	5 649 023	7 567 708	10 826 668	12 394 049	12 894 676
Unscheduled	56 458	60 336	45 830	74 183	66 231	54 654
Total	21 429 817	7 296 351	8 970 355	14 851 394	17 723 599	18 701 088

Source: ACSA Data Cuts December 2024

Passenger Arrivals Movement: 2024 compared to 2023

Table 24 provides the total passenger arrivals at Airports Company South Africa (ACSA) airports during 2024 compared to 2023. Total passenger arrivals increased by 5,5%, from 17 723 553 in 2023 to 18 701 088 in 2024. Unscheduled passengers recorded a decrease of -17,5% in 2024 compared to 2023, whilst Regional, International and Domestic passengers reported a growth of 14,3%, 8,8% and 4,0% respectively.

Table 24: Arriving Passengers to South Africa by Region 2024 compared to 2023

Arriving Passengers	2024	2023	Difference	% Change
International	5 262 510	4 835 220	427 290	8,8%
Regional	489 248	428 054	61 194	14,3%
Domestic	12 894 676	12 394 049	500 627	4,0%
Unscheduled	54 654	66 230	-11 576	-17,5%
Total	**18 701 088**	**17 723 553**	**977 535**	**5,5%**

Source: ACSA Data Cuts December 2024

Passenger Departure Movements: 2024 compared to 2023

Table 25 below shows the total passengers departing from ACSA airports during 2024 compared to 2023. Total passengers departing from the country increased by 5,3% in 2024 compared to same period in 2023. The number of international, regional and domestic passengers departing from different ACSA airports also showed a positive growth. For passengers departing on unscheduled flights, there was a decrease of -12,1% respectively, from 65 165 during 2023 to 57 270 in 2024.

Table 25: Departing Passengers from South Africa by Region: 2024 compared to 2023

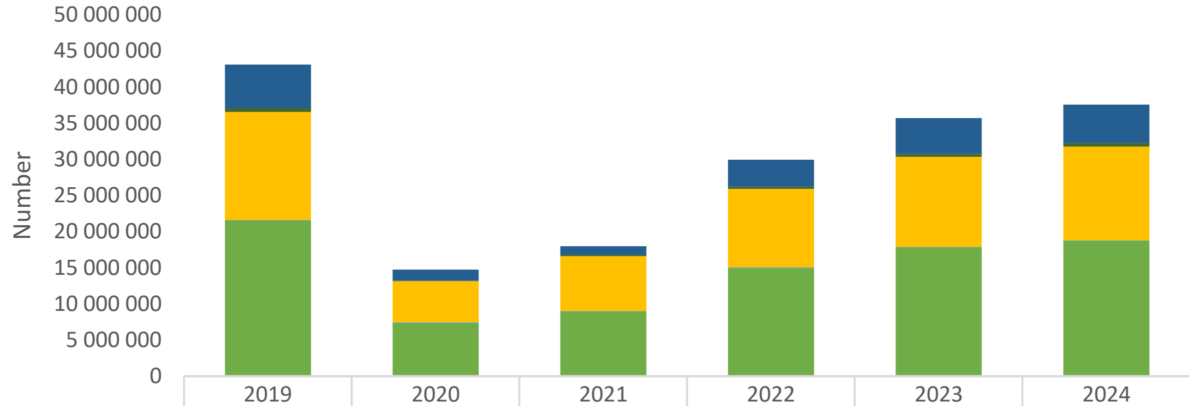
Departing Passengers	2024	2023	Difference	% Change
International	5 333 867	4 943 195	390 672	7,9%
Regional	481 450	418 013	63 437	15,2%
Domestic	12 912 777	12 420 004	492 773	4,0%
Unscheduled	57 270	65 165	-7 895	-12,1%
Total	**18 785 605**	**17 846 377**	**939 228**	**5,3%**

Source: ACSA Data Cuts December 2024

Passenger Departing Movement: 2019-2024

Figure 25 below indicates passenger departing movement for the period 2019-2024. Total passengers departing from ACSA airports in 2024 declined by -12,9% when compared to 2019, pre-COVID; falling from 21 567 439 in 2019 to 18 785 605 in 2024.

Figure 25: Passenger Departing Movement: 2019-2024



	2019	2020	2021	2022	2023	2024
International	6 039 107	1 491 364	1 226 626	3 733 912	4 943 195	5 333 867
Regional	551 244	107 176	150 554	332 383	418 013	481 450
Domestic	14 919 116	5 673 768	7 578 928	10 846 991	12 420 004	12 912 777
Unscheduled	57 972	100 331	46 714	73 172	65 165	57 270
Total	21 567 439	7 372 639	9 002 822	14 986 458	17 846 377	18 785 605

Source: ACSA Data Cuts December 2024

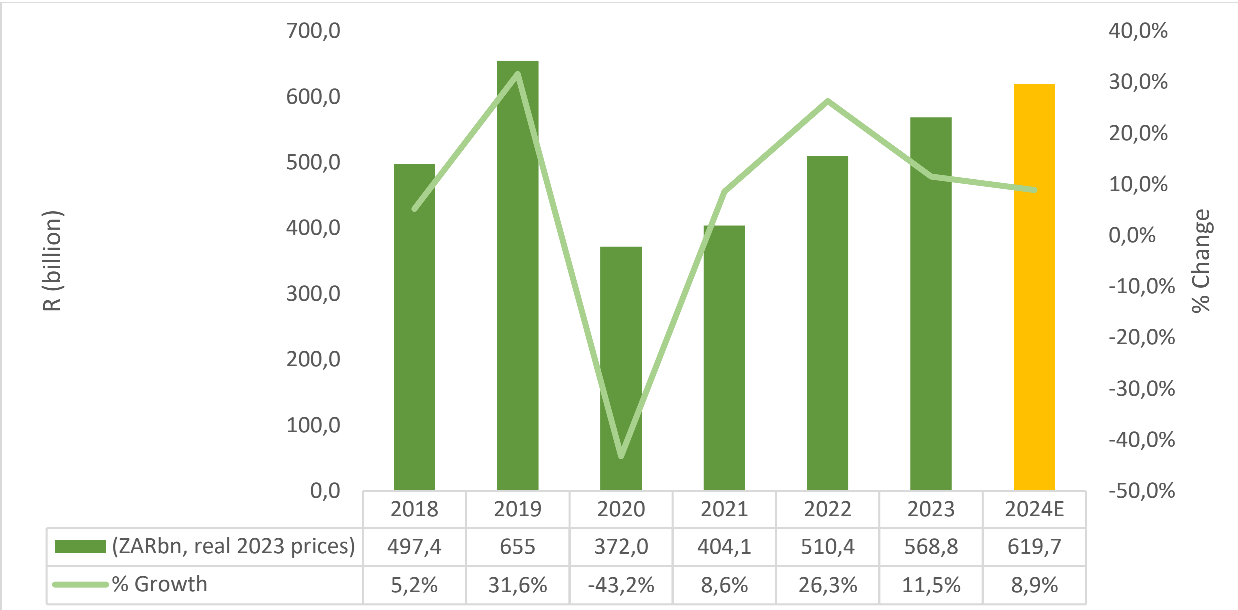
6.9 ECONOMIC VALUE OF TOURISM IN SOUTH AFRICA

This section of the report provides the value of the travel and tourism sector to the South Africa's economy by analysing key indicators which include the contribution of tourism to South Arica's Gross Domestic Product (GDP) and South Africa's total employment for the period 2019-2024 using data reported in the latest WTTC report released during 2024 and the Tourism Satellite Account (TSA) Provisional 2020, 2021 and 2022.

Travel and Tourism Sector's Total Contribution to GDP in South Africa: 2018-2023 and 2024 Estimates

Stats SA's TSA does not produce results for the tourism sector's total contribution (direct and indirect) to GDP and employment as there is no framework or methodology to guide this measure. The data presented in this section was therefore sourced from the WTTC country report for South Africa, which provides 2024 Estimates. The figure below shows that for the period 2018-2024, it was estimated that the total (direct and indirect) contribution of tourism to GDP would increase from R568,8 billion in 2023 to an estimated R 619,7 billion in 2024 (8,8% of GDP), which was a growth of 8,9%.

Figure 26: Travel and Tourism Sector's Total Contribution to GDP in South Africa: 2018-2023 and 2024 Estimates



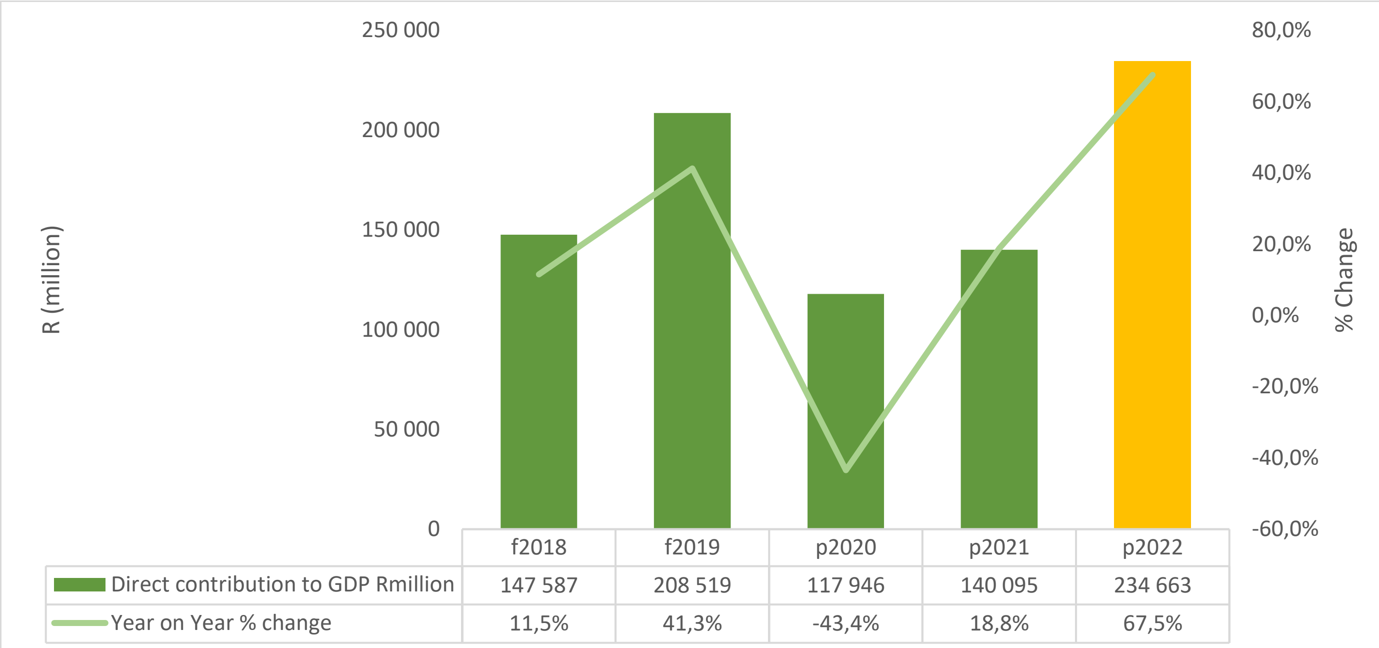
	2018	2019	2020	2021	2022	2023	2024E
Relative contribution (% whole economy)	7,2%	9,5%	5,7%	5,9%	7,3%	8,2%	8,8%

Note: Real 2023 prices *Source: WTTC, South Africa Report, 2024*

Direct Contribution of Tourism to GDP in South Africa: 2018-2023 and 2024 Estimates

Figure below presents the final figures for 2018 and 2019 and provisional results for 2020, 2021 and 2022 as per the TSA published by Stats SA. The direct contribution of tourism towards the country's GDP increased from R 140 095 million in 2021 (2,3% of GDP) to R234 663 million in 2022 (3,5% of GDP), which was a growth of 67,5% compared to 2022.

Figure 27: Direct Contribution of Tourism to GDP: 2018-2022



		f2018	f2019	p2020	p2021	p2022
Direct contribution of travel and tourism as % of SA GDP		2,8%	3,7%	2,1%	2,3%	3,5%

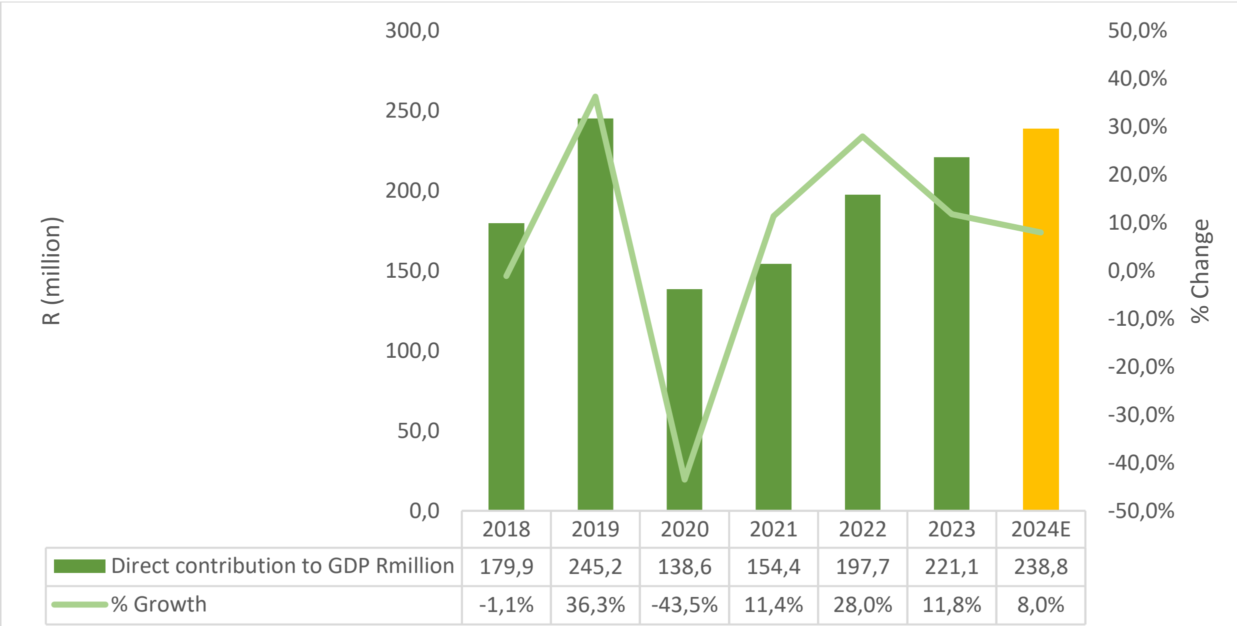
**Note: (f)=Final and (p)=preliminary provisional 2020, 2021 and 2022*

Source: Tourism Satellite Account for South Africa,

Travel and Tourism Sector's Direct Contribution of Tourism to GDP in South Africa: 2018-2023 and 2024 Estimates

Figure 28 below provides estimates from WTTC on the direct contribution of travel and tourism to GDP in South Africa for the period 2018-2024. According to WTTC, it was estimated that the direct contribution of tourism to GDP would increase from R197,7 billion in 2022 to R221,1 billion in 2023 (3,2% of GDP), which was a growth of 11,8 %. it was estimated that the direct contribution of tourism to GDP would grow from R221,1 billion in 2023 to an estimated R238,8 billion in 2024 (3,4% of GDP), which was an increase of 8,0%.

Figure 28: Travel and Tourism Sector's Direct Contribution to GDP in South Africa: 2018-2023 and 2024 Estimates



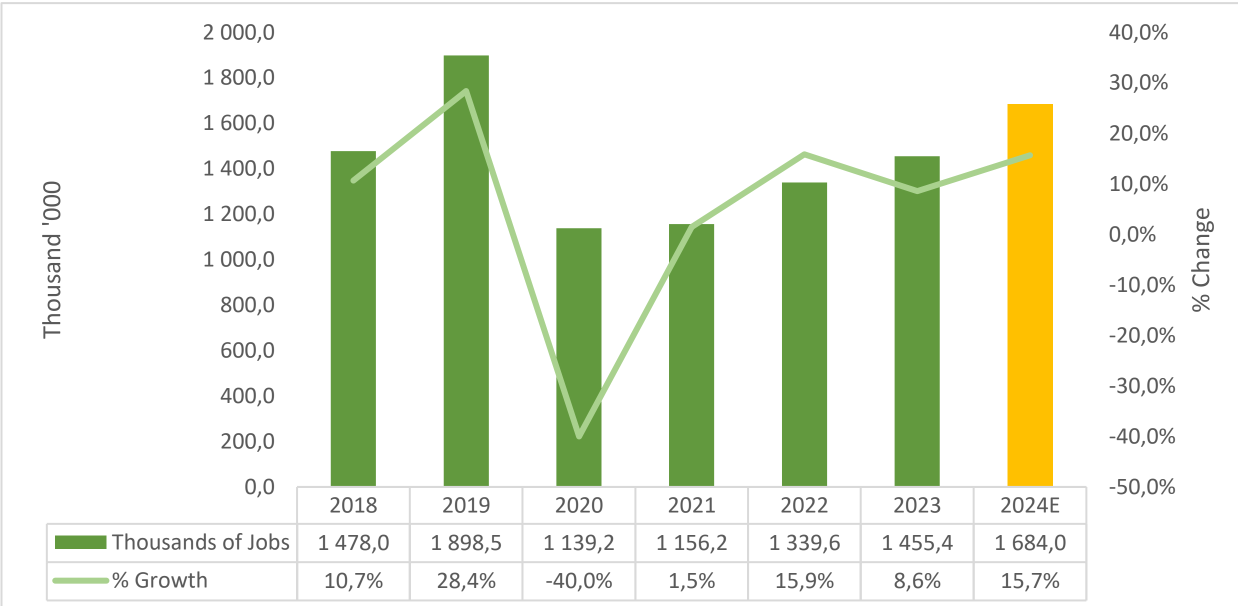
	2018	2019	2020	2021	2022	2023	2024E
Relative contribution (% whole economy)	2,6%	3,5%	2,1%	2,3%	2,8%	3,2%	3,4%

Note: Real 2021 prices *Source: WTTC, South Africa report, 2024*

Travel and Tourism Sector's Total Contribution to Employment in South Africa: 2018-2023 and 2024 Estimates

Data on the total contribution of the travel and tourism sector to employment in South Africa was sourced from WTTC and is provided in figure 29 below.

Figure 29: Travel and Tourism Sector's Total Contribution to Employment in South Africa: 2018-2023 and 2024 Estimates



	2018	2019	2020	2021	2022	2023	2024E
Relative contribution (% whole economy)	9,0%	11,6%	7,6%	7,9%	8,6%	8,8%	10,2%

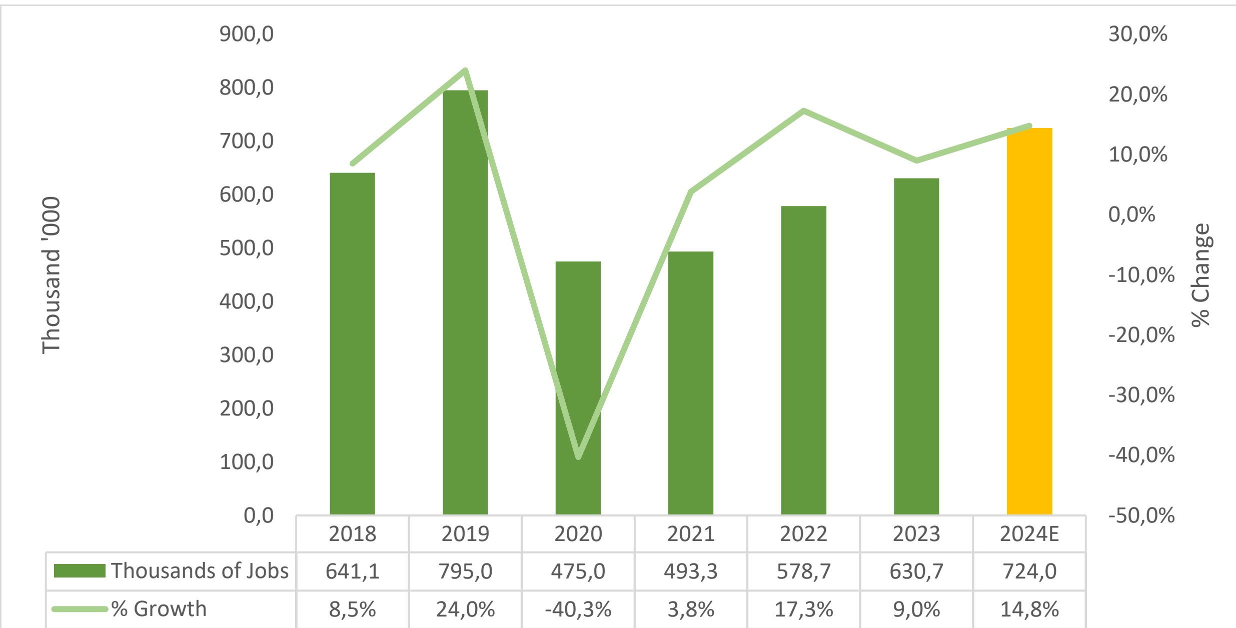
Source: WTTC South Africa report, 2024.

According to WTTC estimates, in 2023 the travel and tourism sector contributed about 1 455,400 jobs, which was an increase of 8,6%; and contributing 8,8% to total employment in 2023 compared to 1 339,600 jobs in 2022, which was 8,6 % share to the country's total employment. Estimates for 2024 indicate that total contribution of the travel and tourism sector to employment was about 1 684,000 jobs (10,2% of total employment), which is a growth of 15,7%.

Travel and Tourism Sector's Direct Contribution to Employment in South Africa: 2018-2023 and 2024 Estimates

According to WTTC, it was estimated that the direct contribution of tourism to employment increased from 578,700 in 2022 to 630,700 in 2023 (3,8% of employment), which was a positive growth of 9,0%. Estimates for 2024 indicate that direct contribution of the travel and tourism sector to employment was about 724,000 jobs (4,4% of total employment) which is a growth of 14,4%.

Figure 30: Travel and Tourism Sector's Direct Contribution to Employment in South Africa: 2017-2022 and 2023 Estimates



	2018	2019	2020	2021	2022	2023	2024E
Relative contribution (% whole economy)	3,9%	4,9%	3,2%	3,4%	3,7%	3,8%	4,4%

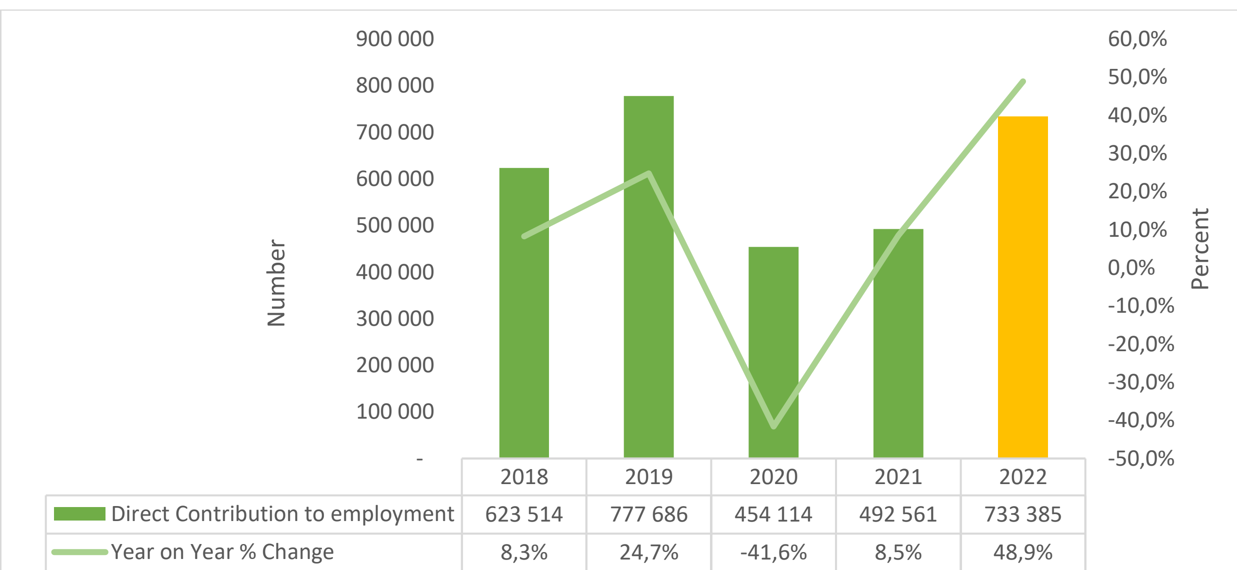
Source: WTTC South Africa report, 2024.

The WTTC estimates for global, Africa and South Africa have indicated that the travel and tourism sector's contribution to GDP has improved in 2023 compared to 2022 results.

Direct Contribution of Tourism to Employment: 2018-2022

Direct tourism employment figures were sourced from the TSA published by Stats SA 2024. In 2018, there was a total of 623 514 direct jobs, increasing to 777 686 direct jobs in 2019 which were created by the tourism sector. There was a decrease in number of jobs created in 2020 (454 114) when compared to 777 686 in 2019. In 2021, direct jobs increased to 492 561, from 454 114 direct jobs created in 2020. There was a job increase of 48,9% in 2022 compared to 2021, from 492 561 direct jobs created in 2021 to 733 385 in 2022. The tourism sector directly contributed to about 4,7% to the country’s total employment in 2022, which was a decrease of -5,7% in the number of direct jobs in 2022 compared to 2019.

Figure 31: Direct Tourism Employment: 2018-2022



Indicators	2018	2019	2020	2021	2022
Direct Contribution of travel and tourism as % of total SA employment	3,8%	4,8%	3,0%	3,4%	4,7%

Source: Tourism Satellite Account for South Africa provisional 2020, 2021 and 2022

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