



Inspiring new ways

TOURISM

ANNUAL
PERFORMANCE
REPORT

JAN - DEC

20
24

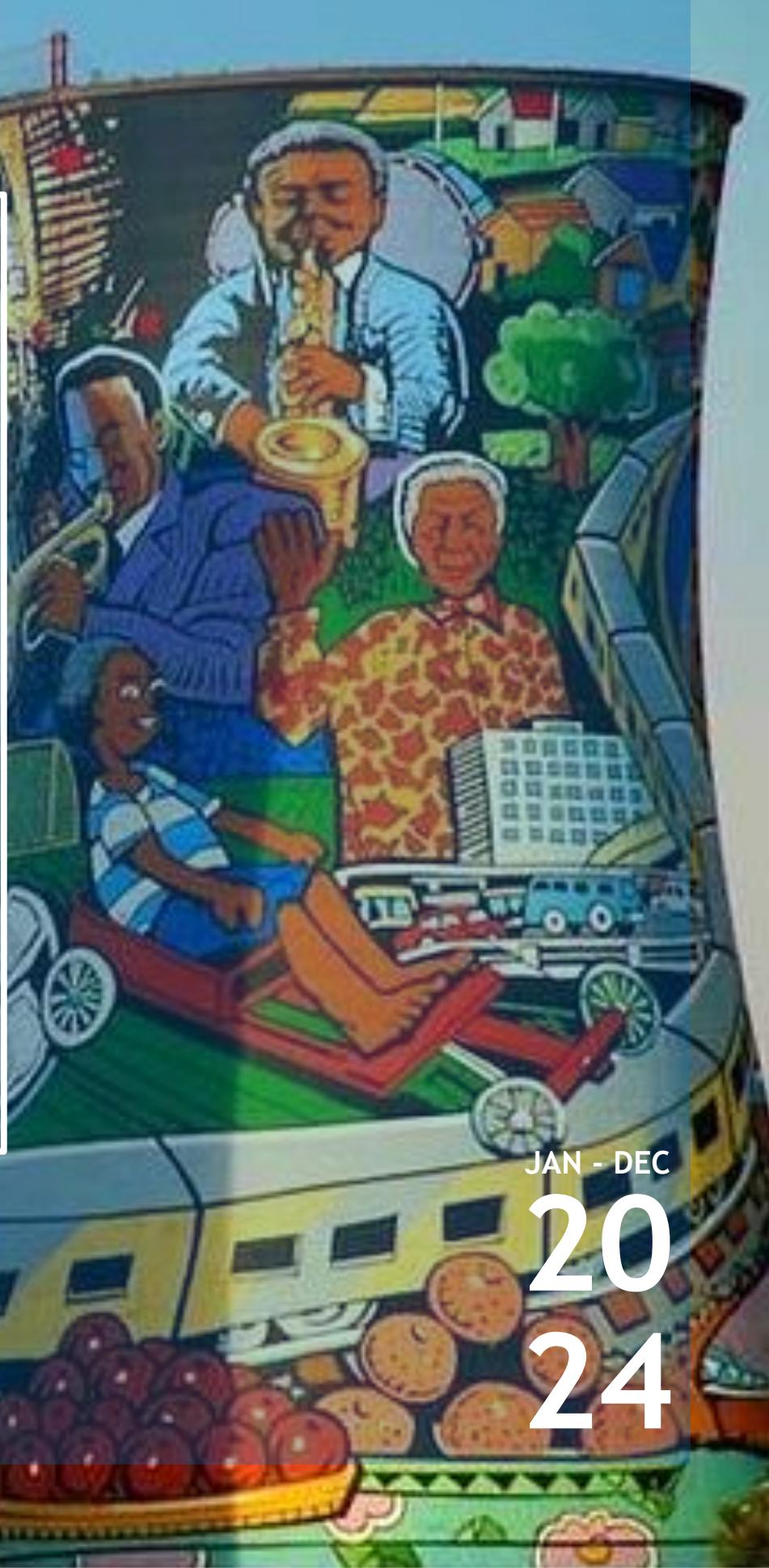


TABLE CONTENTS

04	 EXECUTIVE SUMMARY
06	 ABOUT THE REPORT
13	 SA ECONOMY & GLOBAL TOURISM OUTLOOK
17	 INTERNATIONAL TOURISM PERFORMANCE
42	 KEY REGIONS PERFORMANCE
59	 PROVINCIAL PERFORMANCE
83	 TECHNICAL NOTES
90	 APPENDIX
131	 CONTACT DETAILS

OVERVIEW



EXECUTIVE SUMMARY

- In 2024, a further **increase of 5.1%** over 2023 was noted in **international arrivals** reaching **8.9 million**, making it the highest number of International tourist arrivals since 2019, leaving a marginal **recovery gap of -12.8%**.
- **Africa** strengthened to a total of **6.8 million arrivals**, marking a **+5.6%** increase against **2023**. Despite the overall increase in arrivals, the total spend is low as a ratio to arrivals, reflecting the nature of these visits being for **VFR** and the dominance of **younger** age groups. The total spend in 2024 marked **ZAR 41.9 billion**, a drop of **-1.7%** against 2023. African tourists had the **lowest geographic spread** of 2.6%.
- **Africa** tourists arriving by **Air** increased to **299.4 thousand**, a **+16.4%** increase against **2023**. The primary reasons for visiting were **VFR** and **MICE**. Similarly to Asian visitors, Africa Air arrivals have the highest proportion of visitors for **MICE** purposes. **Total spend** by tourists arriving by air increased against 2023 by **+10.8%** reaching **ZAR 5.6 billion**.
- **European** tourist arrivals totalled **1.3 million** this year. Total **spend** dropped to **ZAR 28.3 billion**, a **-11.3%** decrease vs 2023. The **average spend** per trip declined by **-12.0%** to **ZAR 24 900**. European visitors showed a **high geographic spread of 33.8%**, visiting an average of 1.5 provinces. Europeans' **top province** visited was the **Western Cape** (58.0%), followed by **Gauteng** (38.7%). European travellers are mostly **holidaymakers**. A **drop** was noted from its source Market the **UK**.
- Arrivals from the **Americas** reached **505.6K**, an increase of **+10.9%** vs 2023. American travellers are predominantly **holidaymakers**. The total **spend** reached **ZAR 14.0 billion**, a further **+14.3%** rise over 2023. **Brazil** performed particularly well in 2024, **increasing** year-on-year by **+94.2%**. American tourists visit **Gauteng** and the **Western Cape** almost equally (50.7% & 48.0%), and noted the second highest geographic spread at 36.9%
- **Asian travel** increased by **+4.2%** vs. 2023 reaching **207.7k** arrivals. Despite steady year-on-year growth since 2021, it has the **most pronounced 2019 recovery gap at -33.3%**. Asian travel differs from other overseas markets, in that almost equal to **VFR** and **holiday** purposes, travelling for **Business** and **MICE**, accounted for a **combined share of 42.9%**.
- **Australasia** increased by **+12.4%** against 2023 reaching **119.0 thousand**. It led the overseas regions in **VFR** accounting for 51.2%. Despite **VFR** being dominant, this region noted the **highest geographic spread at 40.8%** and a high arrival to spend ratio. They predominantly travel to **Gauteng** and the **Western Cape**, the Western Cape increased by **+5.1 pp** against 2023. This region could become a key region for the Western Cape.
- **Middle Eastern** arrivals dropped sharply in 2024 to **45.6 thousand**, a **- 17.9%** decline. Their total **spend** remained flat at **ZAR 1.1 billion**, with an **average spend of ZAR 28 600** per tourist.
- Total **Foreign Direct Spend (TFDS)** dipped marginally to **ZAR 91.6 billion**, a **-3.3%** decline against 2023. An **average spend of ZAR 10 900 per tourist**, down **-7.8%** against 2023. European **spend** dropped by **-11.3%** but **higher spend** was recorded from the **Americas** and **Australasia** against 2023.
- Total **bed nights** and **length of stay** were stable against 2023, noting a total of **114.6 million bed nights** and an average **length of stay of 13.3 nights**. The **Americas** and **Australasia** region increased the number of **bed nights** during 2024 by **+18.2%** and **+7.6%** against 2023.
- The **geographic** spread continued to decline to **9.5%**, the **lowest in six years**. The geographic spread varies greatly between **Overseas (33.6%)** and **Africa Land (2.3%)** tourists, which is reflected in their main purpose for travel and their behaviour.
- Overall tourist **satisfaction** remained high in 2024, with a score of **4.6** out of 5.

KEY PERFORMANCE INDICATORS



vs. 2019

vs. 2023

INTERNATIONAL TOURIST ARRIVALS



8.9 MILLION

-12.8%

+5.1%

TOTAL FOREIGN DIRECT SPEND



ZAR 91.6 BILLION

+12.8%

-3.3%

LENGTH OF STAY



13.3 NIGHTS

+15.8%

+2.8%

TOTAL BED NIGHTS



114.6 MILLION

+2.1%

+2.5%

GEOGRAPHIC SPREAD



9.5%

*-0.3

SATISFACTION RATING



4.6

+1.9%

-0.6%

Key growth and change rates shown in this report (except for Geographic Spread) are in comparison to 2023.

*Change in percentage points (P.P) vs. 2023.



OBJECTIVES ABOUT THE SURVEY

The Departure Survey, which was commissioned by South African Tourism in 2001, is a key instrument for gathering insights about foreign tourists exiting South Africa via major airports and border posts. The survey first began as a point-in-time survey conducted in winter and summer. Its primary objective is to track and understand travel behaviours, expenditure patterns, site visits, and overall satisfaction levels of tourists. The data collected is pivotal for evaluating South Africa's performance against key tourism objectives, including increasing tourist volume, improving geographic spread, boosting tourist spend, enhancing seasonality patterns, and promoting longer stays. Additionally, it supports the development of effective marketing strategies, addressing market needs, and facilitating sustainable GDP growth, job creation, and transformation in alignment with the Tourism Act's mandates.



DEFINITIONS

- **Visitor** - Any person travelling to a place other than his/her usual environment for less than 12 months and whose primary purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.
- **Same-day visitor** - Any person who visits a place without staying the night.
- A tourist is an overnight visitor taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.
- **Geographic spread** - is the distribution of tourists across different regions or locations, indicating how tourism activities are spread geographically. For this survey, the statistic is obtained by expressing the total number of tourists that visited more than one province as a proportion of the total arrivals.
- **TDFS** - Stands for Total Foreign Direct Spend within South Africa. When reported it excludes the component spent on capital goods.
- **Average Spend** - This is the spend per tourist, obtained by dividing the total direct spend (TFDS) by the number of tourists.
- **Bed nights** - This is a measure of occupancy representing the total number of nights tourists stay in South Africa.
- **Length of stay** - This is the duration of time that a visitor or tourist spends at a destination or in the country; in this survey, it is calculated by dividing total bed nights by the total number of tourists.



ABOUT THE REPORT

INTERNATIONAL TOURIST ARRIVALS

The survey is conducted monthly and covers South Africa's two main international airports (Oliver Tambo and Cape Town) as well as the 12 main land border posts (Grobler's Bridge, Maseru Bridge, Oshoek, Golela, Kopfontein, Pioneer Gate, Lebombo, Beitbridge, Vioolsdrift, Nakop, Ficksburg, Ramatlabama), the latter being the most significant point of entry into South Africa by foreign nationals. Durban's King Shaka International Airport and all seaports are currently excluded from the survey as they receive less than 5% and 1% of international tourist arrivals respectively.

The survey is based on a random stratified sampling framework of $n=3\ 800$ per month for both of the airports and $n=1\ 000$ per month for all land border posts. The sample framework is derived from Statistics South Africa (StatsSA) tourist arrivals data and the survey results are weighted back according to the same tourist arrival data. The margins of error for the airport and land border post monthly samples are 1.6% and 3.1% respectively, both at a 95% confidence level. As such, the survey accurately represents tourists arriving in South Africa as well as their behaviours and opinions. Arrival numbers given are actual tourist arrivals from StatsSA and not tourist arrivals as calculated by the survey. When crossed with other survey variables, tourist arrival numbers are survey-based.



ADDITIONAL SOURCES USED IN THIS REPORT

1. [P0350 - International Tourism, December 2024](#)
2. [P0350 - International Tourism, November 2024](#)
3. [P0350 - International Tourism, October 2024](#)
4. [P0141 - Consumer Price Index \(CPI\), December 2024](#)
5. [P0141 - Consumer Price Index \(CPI\), November 2024](#)
6. [P0141 - Consumer Price Index \(CPI\), October 2024](#)
7. [P6410 - Tourist accommodation, December 2024](#)
8. [P6410 - Tourist accommodation, November 2024](#)
9. [P6410 - Tourist accommodation, October 2024](#)
10. [P0441 - Gross Domestic Product \(GDP\), 4th Quarter 2024](#)
11. [P0441 - Gross Domestic Product \(GDP\), 3rd Quarter 2024](#)
12. <https://www.unwto.org/news/international-tourism-recovers-pre-pandemic-levels-in-2024>
13. <https://www.unwto.org/un-tourism-world-tourism-barometer-data>
14. <https://www.iata.org/en/iata-repository/publications/economic-reports/global-outlook-for-air-transport-december-2024/>
15. <https://tradingeconomics.com/south-africa/gdp-growth-annual>



DISCLAIMER

SA Tourism's Analytics and Insights Unit makes every effort to publish reports that are error-free. However, with the large number of complex records that are analyzed, we cannot guarantee that all reports are totally free of error. All errors that are detected are immediately corrected and the latest version of the report is always made available on www.southafrica.net/research.

To access this report online please visit the research section on the South Africa Tourism website at www.southafrica.net/research or for more information e-mail: research@southafrica.net.

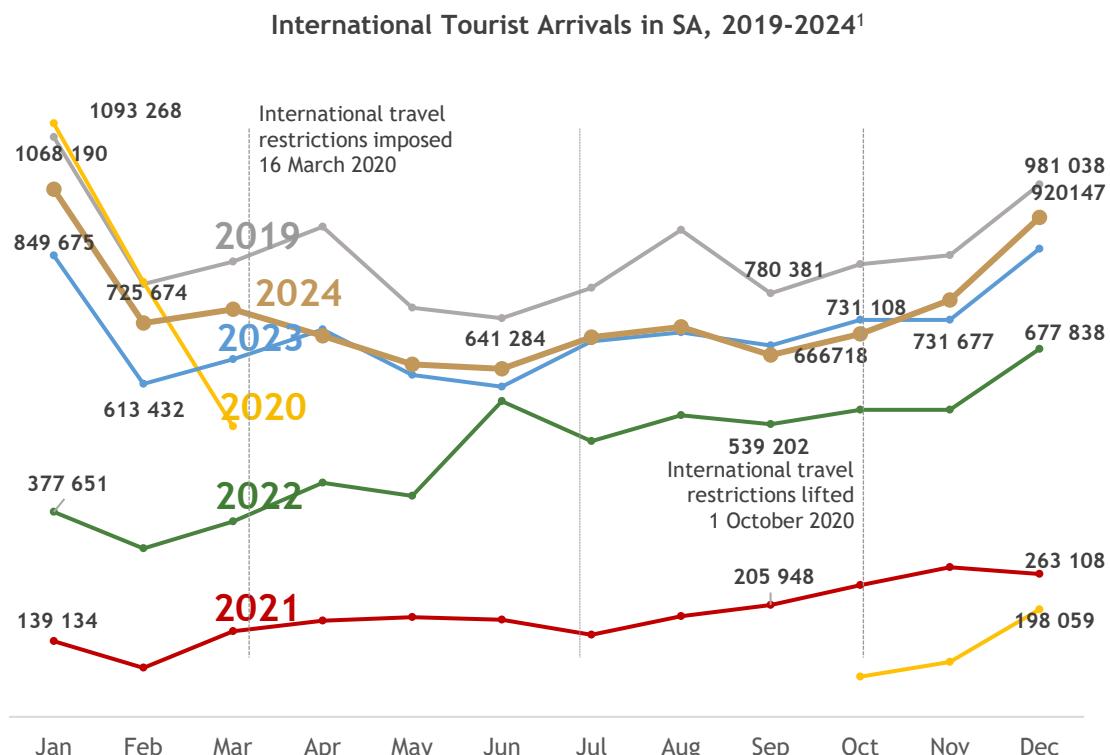


ABOUT THE REPORT

IMPACT OF COVID-19 ON THE SURVEY

Due to the Covid-19 pandemic, surveying international tourists at airports and land border posts became impossible and the survey stopped at the end of March 2020. Surveying land border posts became possible only in November 2020, but airports remained impossible to survey till mid-August 2021. Hence, land border post data was imputed for October 2020, and for airports, October-December 2020 data was imputed. Imputation is the process of replacing missing data with substituted values whereby projections of missing data are based on an existing mathematical relationship present in the available data set. Hence, the process was based on corresponding and comparable retrospective values for which full data sets were present.

Since interviewing at the airports became possible only in mid-August 2021, data for Q1 2021 was obtained by readjusting Q1 2020 data for visit purposes recorded by StatsSA in Q1 2021. The output was then weighted based on the number of arrivals from different markets. The assumption made, was that tourists visiting the country for similar purposes are likely to visit similar attractions and, on average, stay for the same duration. For Q2 of 2021, the same data processing was conducted as had been done for Q1 2021 but using Q2 2019 data as there had been no international tourist arrivals in Q2 2020. Interviewing at the Oliver Tambo International Airport resumed in mid-August 2021, and at the Cape Town International Airport in September 2021. Hence, Q3 2021 numbers are based solely on data collected from mid-August till September end and weighted to cater for July and early August. From Q4 2021 onwards, the numbers shown are based solely on survey data.



¹ P0350 - International Tourism, December 2024; P0350 - International Tourism, November 2024; P0350 - International Tourism, October 2024

NOTE TO THE READER –COMPARISONS



The COVID-19 pandemic dealt a severe blow to the tourism industry in South Africa and globally since its onset in March 2020. Although the tourism sector experienced a strong recovery over the last few years, recent trends suggest that near virtual recovery has been reached. The industry has stabilized with year-on-year growths and the recovery to full pre-pandemic levels has recovered or plateaued at the current levels. Global projections indicate further growth globally in 2025. In evaluating tourism performance, progress has been compared to 2019, a benchmark year unaffected by COVID-19. Leading tourism bodies, such as UNWTO and IATA, use these comparisons to assess whether the sector has returned to its pre-pandemic levels.

With this in mind, all of South Africa's international tourism performance KPIs are calculated over 2023 and no longer against 2019. Further, South Africa's GDP growth rate is calculated over the previous quarter as per the source for this (Statistics SA). Nonetheless, in order to show what progress has been made since Covid-19, comparison to 2019 is referenced where relevant. In charts, comparisons to 2023 are part of the YOY line graph while comparisons to 2019 are plotted separately and clearly marked as such. YOY growth rates are provided for all periods (2019 -2024).





Inspiring new ways

GLOBAL TOURISM OUTLOOK



GLOBAL TOURISM PERFORMANCE

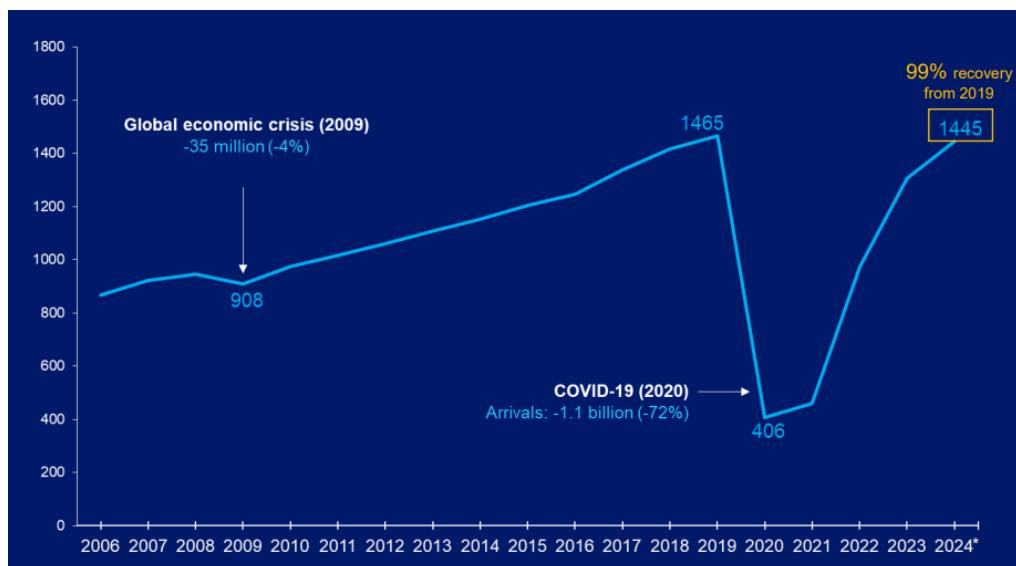
-1.0% ▼

With 1 445 billion international tourist arrivals recorded globally, 2024 marked the recovery of international tourism from the worst crisis in the sector's history, a 99% recovery from 2019, indicating a virtual recovery of pre-pandemic levels. This represented an increase of 11.0% over 2023, or 140 million more international tourist arrivals, with results driven by strong post-pandemic demand, robust performance from large source markets and the ongoing recovery of destinations in Asia and the Pacific.

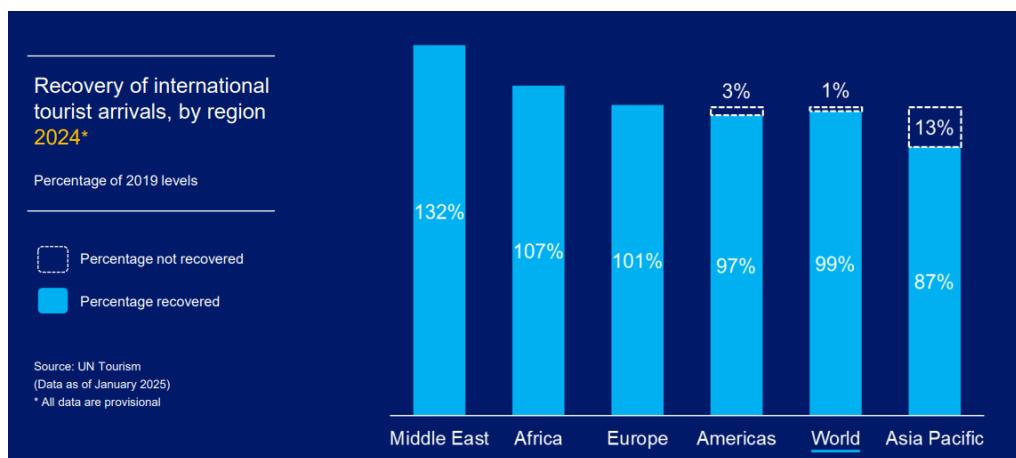
A majority of destinations welcomed more international tourists in 2024 than they did before the pandemic, while visitor spending also continued to grow strongly.¹

A positive global outlook for 2025 points to continued growth, with international tourist arrivals expected to grow by 3.0% to 5.0% in 2025 compared to 2024. This initial projection assumes global economic conditions remain favorable, inflation continues to recede, and geopolitical conflicts do not escalate.

International Tourist Arrivals Worldwide 2006-2024 (Millions)²



International Tourist Arrivals by Region Worldwide 2024 (Millions)²



¹<https://www.unwto.org/news/international-tourism-recovers-pre-pandemic-levels-in-2024>

² Excerpt: 'World Tourism Organization (UN Tourism) (Data as of January 2025).

³ Excerpt: <https://www.unwto.org/un-tourism-world-tourism-barometer-data>

South Africa



SOUTH AFRICAN ECONOMY



THE SOUTH AFRICAN ECONOMY

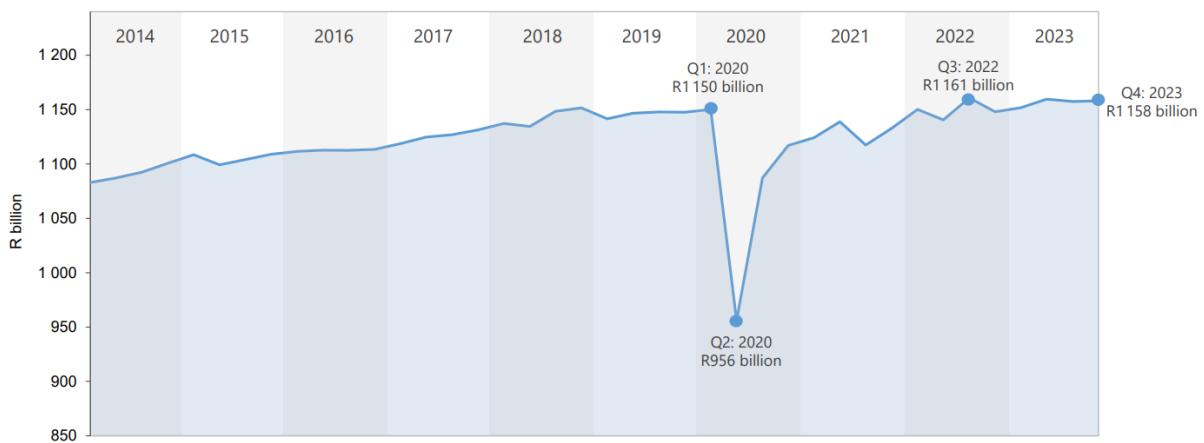
+0.6* ▲

According to the latest preliminary indicators, real GDP increased by +0.6% in 2023, following an increase of +1.9% in 2022. The annual increase in real GDP of +0.6% in 2023 was primarily led by higher economic activities in finance, real estate, and business services, which contributed 0.4 of a percentage point based on growth of +1.8%; transport, storage, and communication, which contributed 0.3 of a percentage point based on growth of +4.3%; personal services, which contributed 0.3 of a percentage point based on growth of 2.0%; and manufacturing, which contributed 0.1 of a percentage point based on growth of +0.5%.¹

The agriculture, forestry, and fishing; trade, catering, and accommodation; electricity, gas, and water; and mining and quarrying divisions recorded negative growth in 2023. The transport, storage, and communication industry increased by +2.9% and contributed 0.2 of a percentage point to GDP growth. The finance industry increased by +0.6% and contributed 0.1 of a percentage point. The personal services industry increased by +0.9% and contributed 0.1 of a percentage point. The trade, catering, and accommodation industry was the main negative contributor, decreasing by +2.9% and contributing -0.3 of a percentage point.¹

Expenditure on GDP increased by +0.7% in 2023, following an increase of +1.9% in 2022. Household final consumption expenditure increased by +0.7% and contributed 0.5 of a percentage point. The main contributors to the growth in HFCE were expenditures on restaurants and hotels (+20.3% and contributing 0.9 of a percentage point), health (+3.6% and contributing 0.2 of a percentage point), clothing and footwear (5.0% and contributing 0.2 of a percentage point), communication (+2.3% and contributing 0.1 of a percentage point), transport (+0.5% and contributing 0.1 of a percentage point) and education (+1.7% and contributing 0.1 of a percentage point).¹

GDP in Q4: 2023 is lower than the peak reached in Q3: 2022³
Real GDP (constant 2015 prices, seasonally adjusted)



¹ Statistical Releases P0441: GDP P0441- 4thQuarter2023.

² Statistical Release P0441: Gross Domestic Product, 4th Quarter 2023, Statistics SA, 5th March 2023.

³GDP 2023 Q4 (Media presentation)



Inspiring new ways

INTERNATIONAL TOURISM PERFORMANCE



INTERNATIONAL TOURIST ARRIVALS

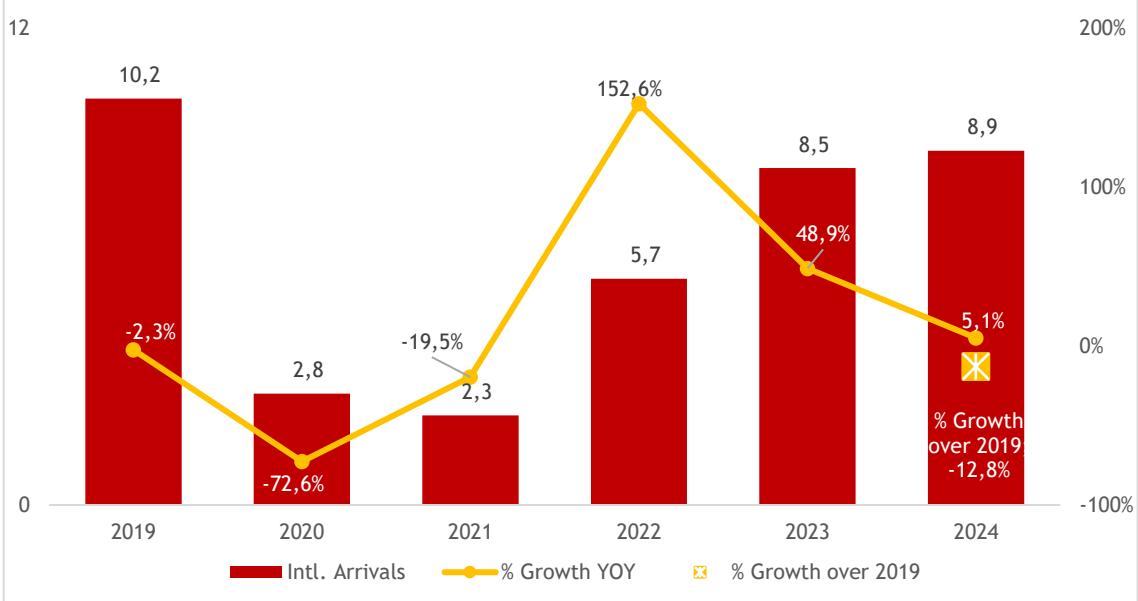


8.9 MILLION

+5.1% 

International tourist arrivals to South Africa steadily increased over the years since 2021 and reached 8.9 million visitors in 2024, a +5.1% growth over 2023. This is the highest number of arrivals noted since the pre-pandemic period of 2019, leaving a recovery gap of -12.8%. In 2023, global predictions were that full recovery was expected in 2024 but factors such as the economic and political circumstances dented this and may continue to do so into 2025. South Africa continued to be an attractive tourist destination with steady year-on-year growth being noted across all regions except the Middle East which dropped year-on-year by -16.1%, which is not unexpected given the current political situation. Year-on-year, arrivals from Australasia and the Americas noted double-digit increases of +12.4% and +10.9%, respectively, while Africa increased by +5.6%. Europe remained flat against 2023.

International Tourist Arrivals 2019-2024 (Millions)



International Tourist Arrivals 2024

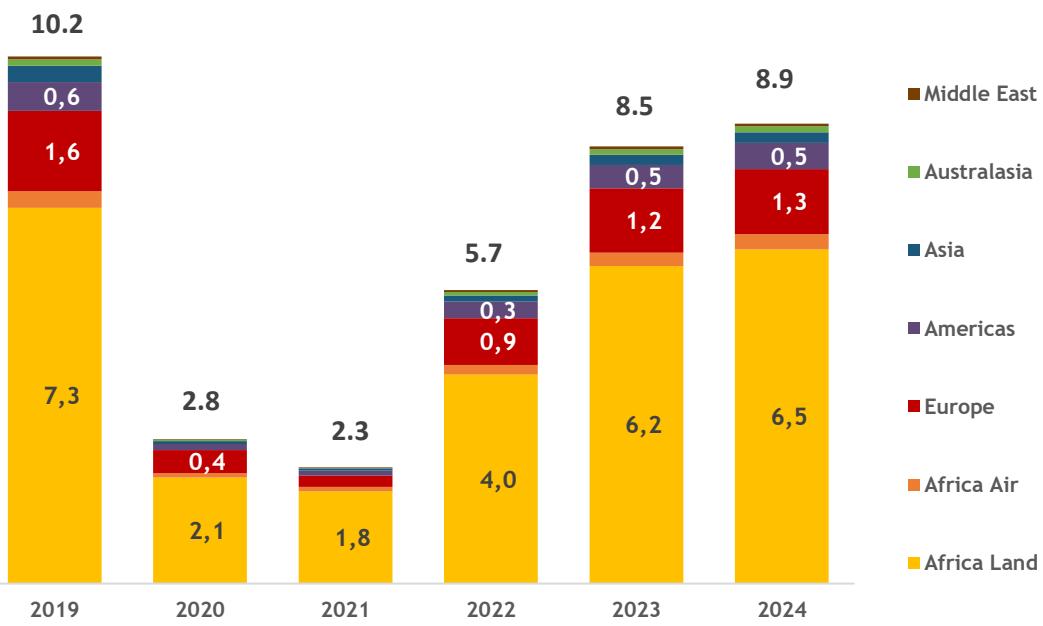
(2024 Actual Arrivals & Share, 2019 vs 2024 & 2023 Growth)



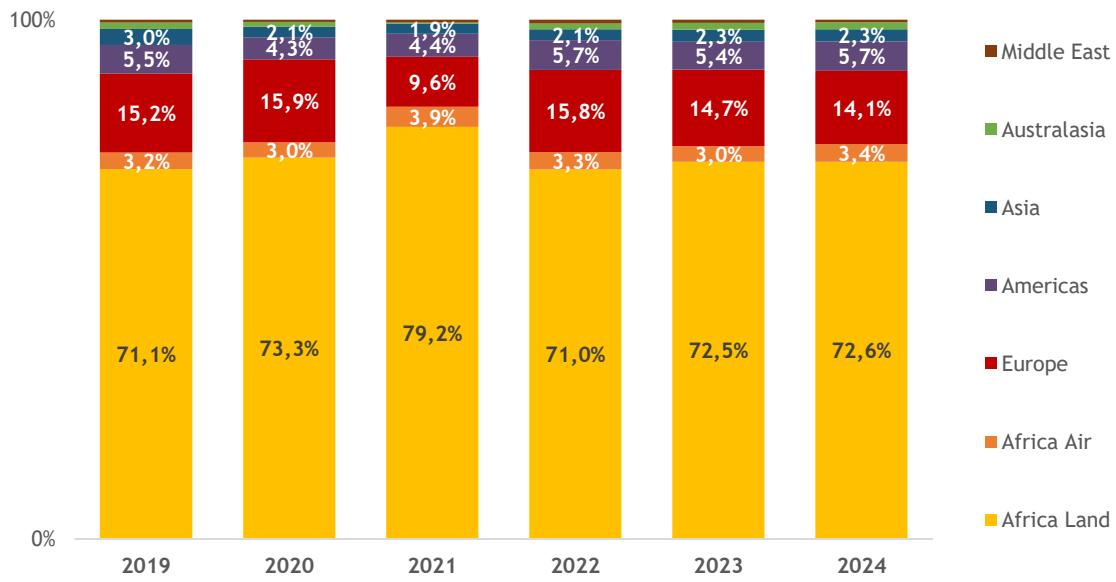


International tourist arrivals in 2024 maintained the regional distribution noted in 2022 and 2023. Africa Land continued to dominate bringing the highest number of visitors to South Africa, maintaining its leading position, accounting for 72.6% of arrivals. Europe is the second largest contributor of visitors to South Africa and maintained a stable share of 14.1% against 2023. Africa land and Europe were the two regions to notably increase the number of arrivals. The other regions remained relatively flat against 2023. Visitors from the Americas accounted for 0.5 million visitors in 2024 in line with the previous year, increasing its share marginally by 0.3 percentage points.

Regional International Tourist Arrivals 2019-2024 (Millions)



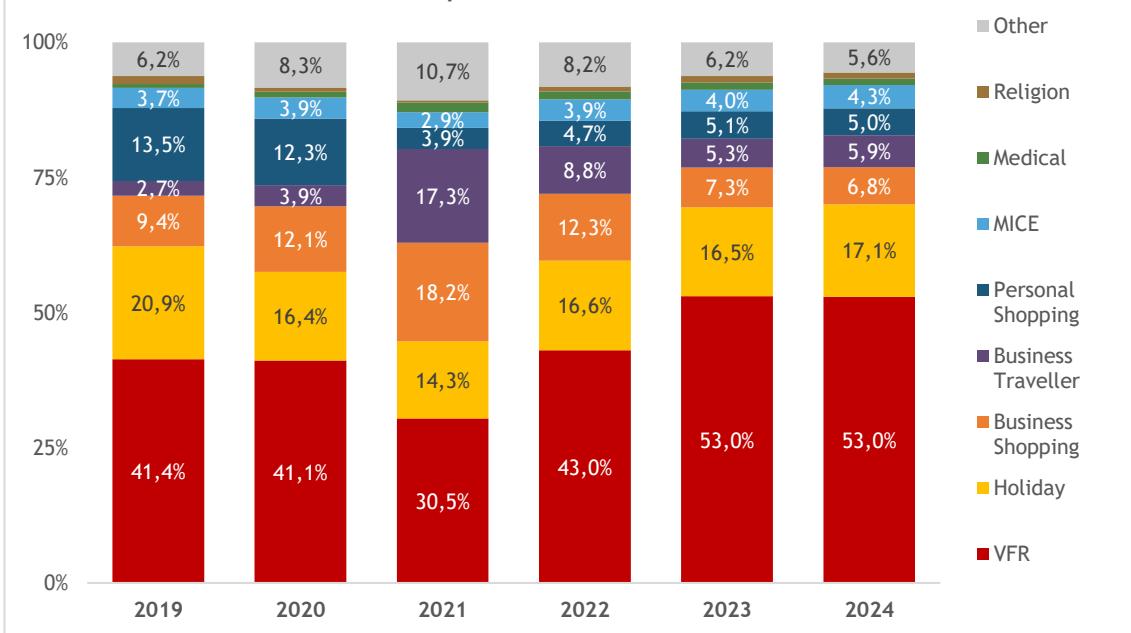
Regional International Tourist Arrivals Shares 2019-2024 (Millions)





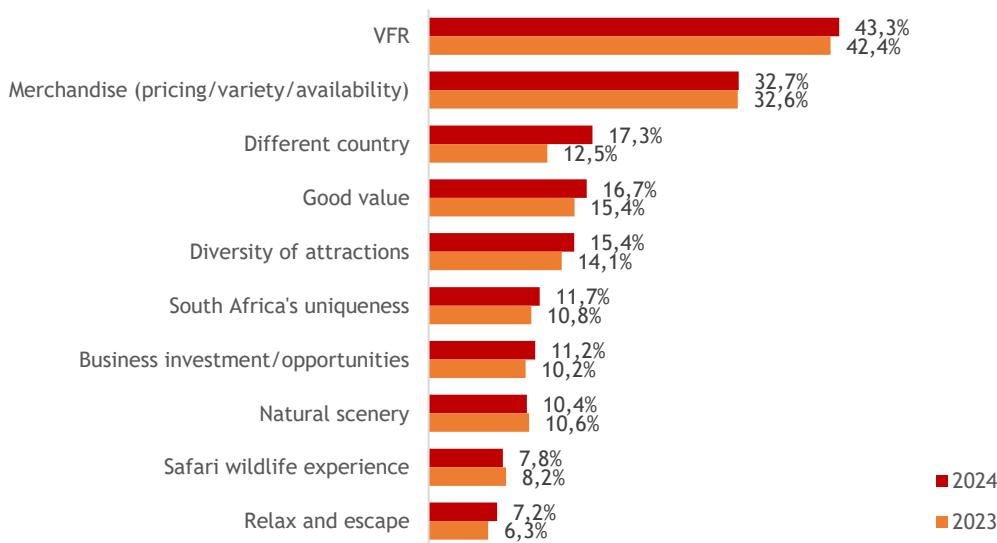
VFR accounts for the majority of visitors to South Africa (53.0%), this is consistent with the previous year but a notable uptick against 2022 of +10.0 percentage points. Holidaymakers increased marginally this year against 2023 by +0.6 percentage points. On the contrary business shoppers dipped slightly by -0.5 percentage points. Overall, the reasons for travel are very stable and consistent with 2023. The proportions for VFR, holiday and personal shopping remained quite varied in 2019, with the 2024 distributions looking more like the new baseline.

Main Purpose of Visit 2019-2024



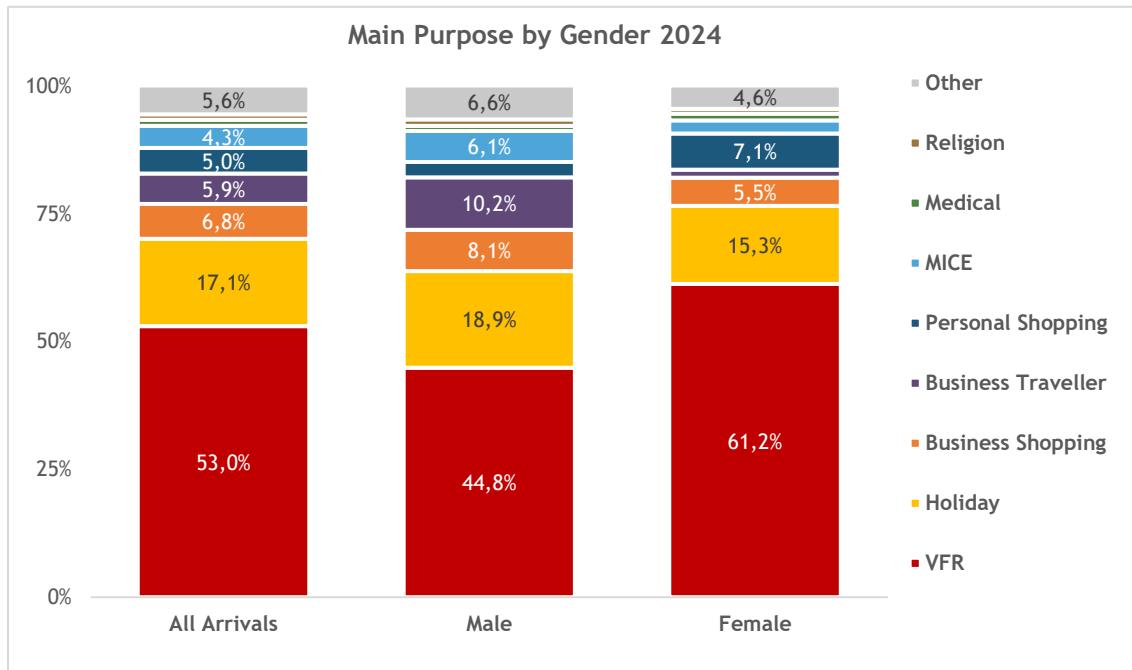
The reasons for travel are reflected in the “What attracted you to South Africa” question. With VFR being the main reason, almost reaching its 2019 levels with 43.3% of mentions. Other key attraction points were the variety & availability of merchandise, visiting a different country, good value, diversity of attractions and South Africa’s uniqueness.

What Attracted You to South Africa (2024 vs 2023)

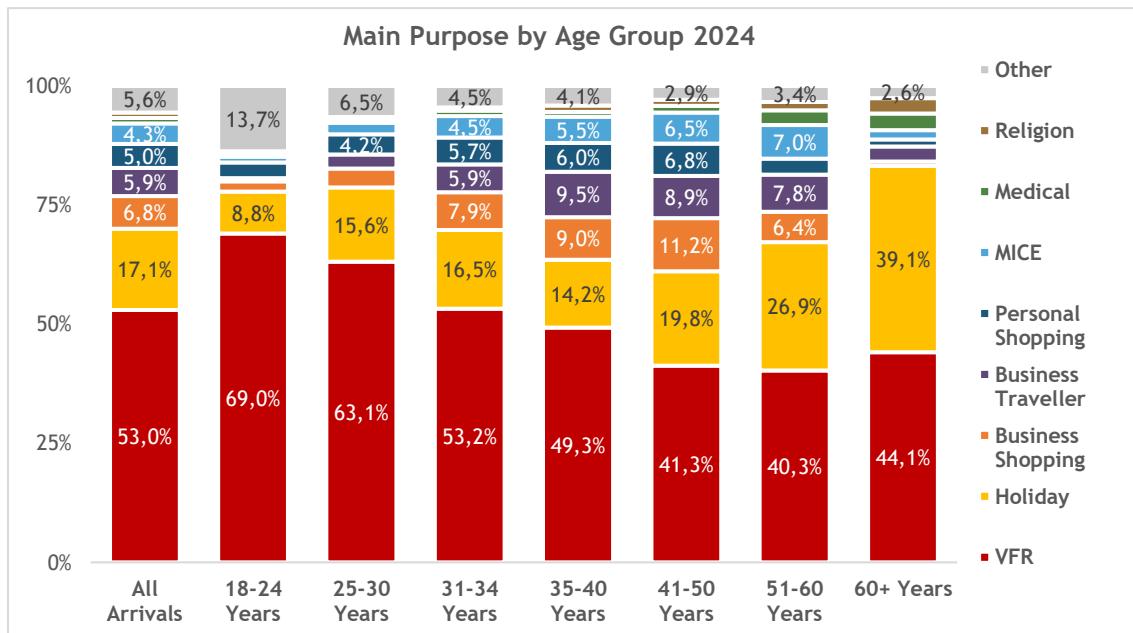




Female visitors to South Africa in 2024 continued to be predominately for VFR (61.2%). Males also visit for VFR (44.8%) but to a lesser extent and a bigger proportion visit for business-related travel with a share of 10.2% vs 1.5% for female visitors. Business shopping, business travel and MICE account for 24.4% of visits by males compared to 9.6% of females visiting for business-related purposes.



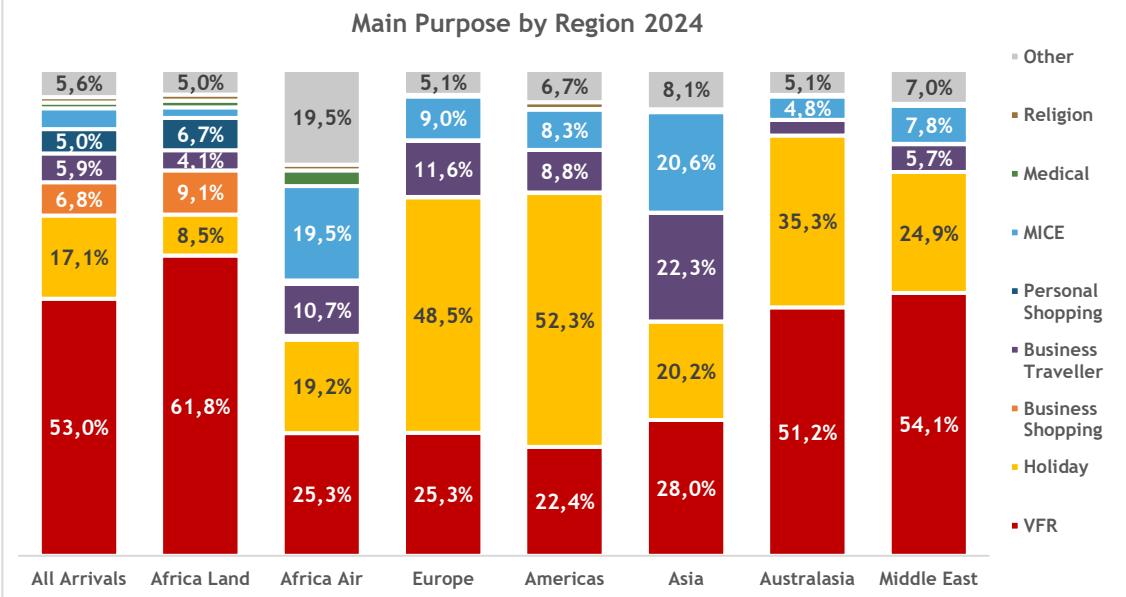
Visiting Family and Relatives skews to younger age groups, especially in the 18-24 and 25-30 year-olds at 69.0% and 63.1% share, respectively. Whereas holidaymakers skew to the older age groups, especially 60+ years with a share of 39.1%, this is expected with this age group being more likely to have the flexibility and income for travel specifically holidays. The share of Business travellers and MICE is largest amongst 31-34, 35-40, 41-50 and 51-60 year-olds.



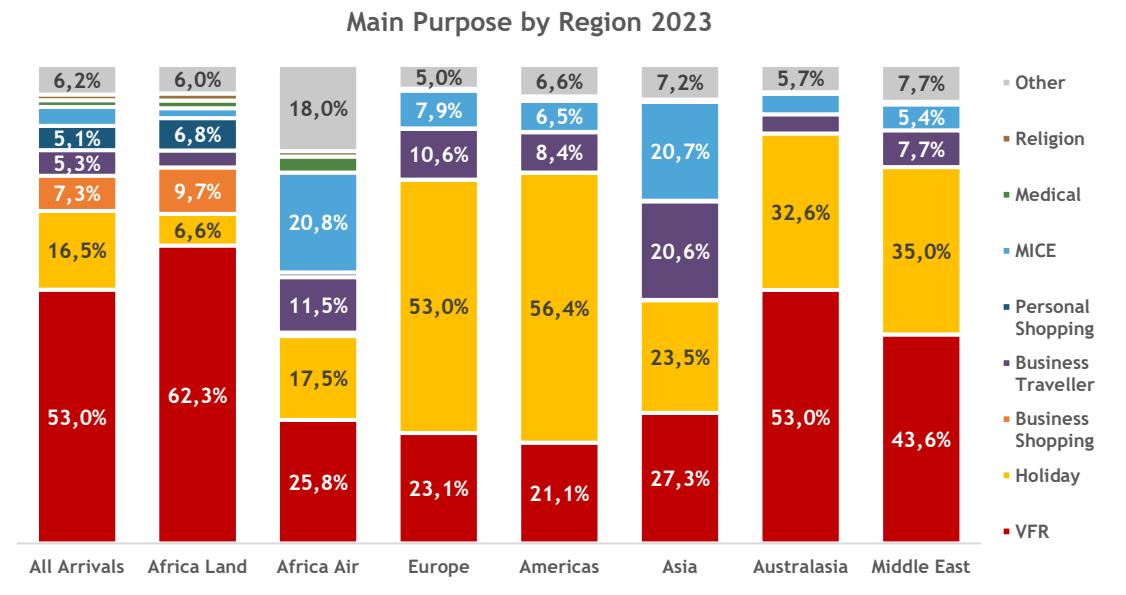


In 2024, the Middle East region has seen the biggest shifts in the purpose for travel against 2023 with an increase of +10.5 pp in VFR and a decrease of -10.1 pp for holidays. In 2024, Australasia remained very stable year-on-year where the majority of visitors are for VFR (51.2%) and a further 35.3% are holidaymakers. The Asia region's purpose for visit also remained very stable year-on-year, Asian visitors share is almost equally split across VFR, holiday, business traveller and MICE. European and American visitors show similarities in terms of travel purposes. For both regions, visiting for holiday purposes is by large the main reason (48.5% & 52.3 respectively) and a further 25.3% and 22.4% to visit friends and relatives. Visitors from Africa Air are stable year-on-year in terms of their purpose for visit, Africa Air visitors' reasons for travel are different to other regions with a large portion visiting for MICE at 19.5%, and a further 10.7% for business travel. Africa Air also has the highest number of visitors for medical purposes holding a 3.2% share. Africa land holds the largest proportion of visitors coming to South Africa for VFR at an astounding 61.8% and the lowest share of holidaymakers at 8.5%.

Main Purpose by Region 2024



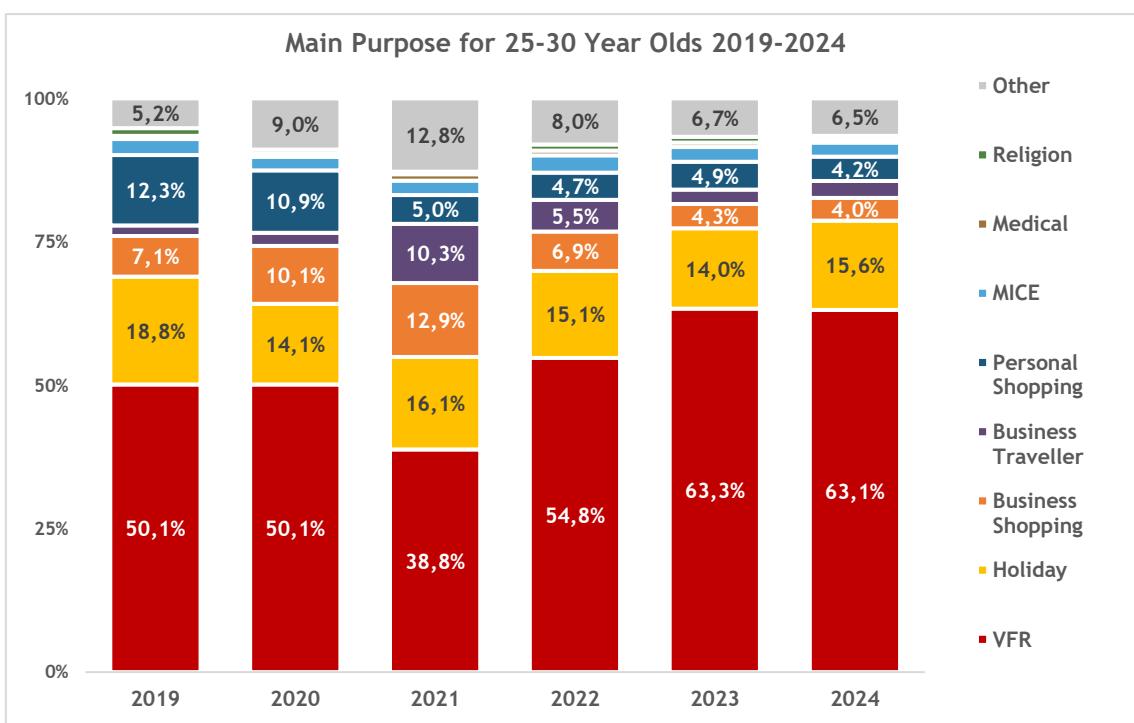
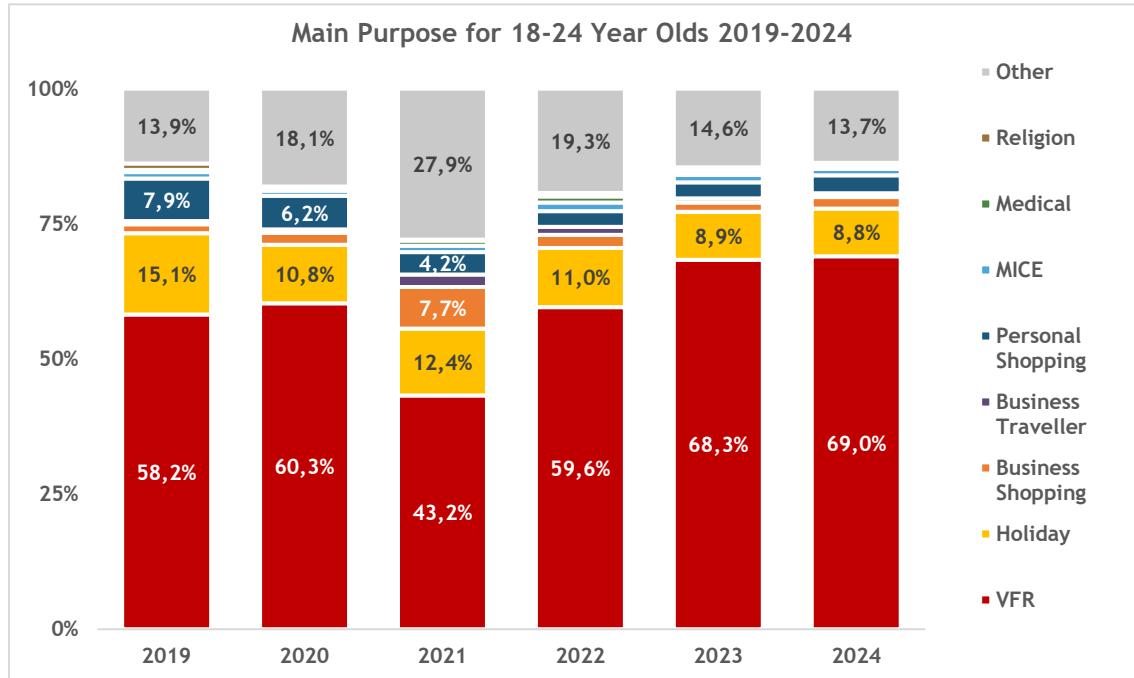
Main Purpose by Region 2023





The distribution of reasons for visiting South Africa has shown consistent patterns for the age categories 18-24 and 25-30 year-olds to those observed in 2023.

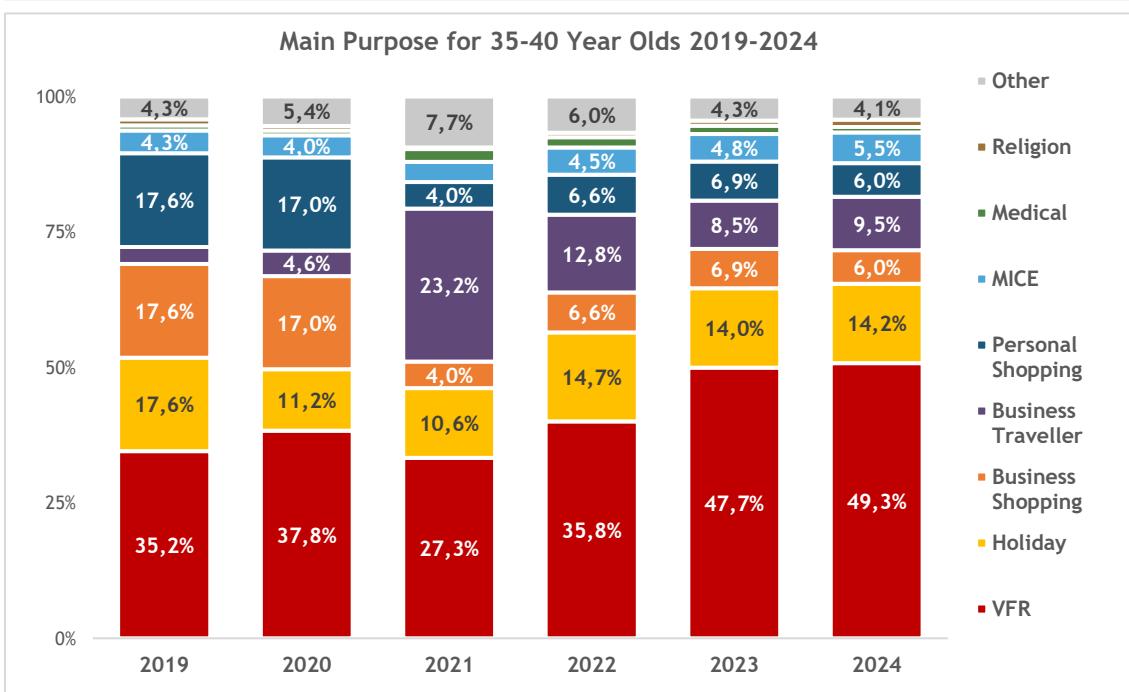
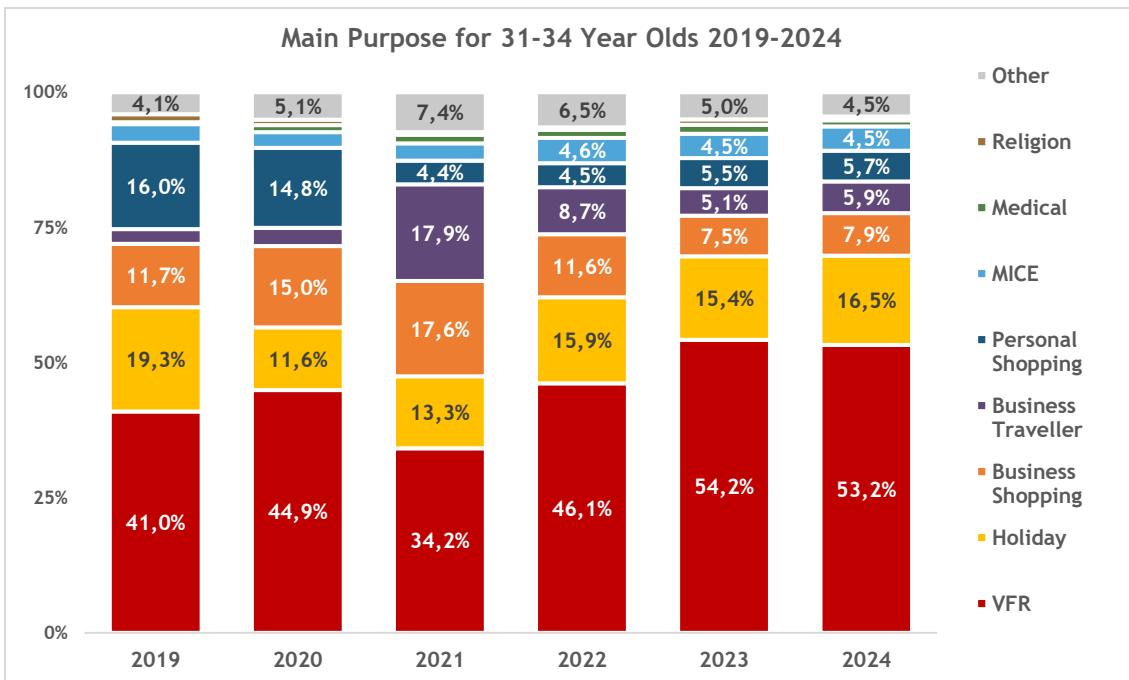
Among 18-24-year-olds, Visiting Friends and Relatives (VFR) dominates at 69.0% in 2024, while holiday travel has been marginally declining year on year since 2021, now at 8.8%. Similarly, the 25-30 age group primarily travels for VFR (63.1%), with holiday visits steady at 15.6%, a gain of 1.6 percentage points year on year, offsetting its loss in the previous year and maintaining the same pattern observed in 2023.





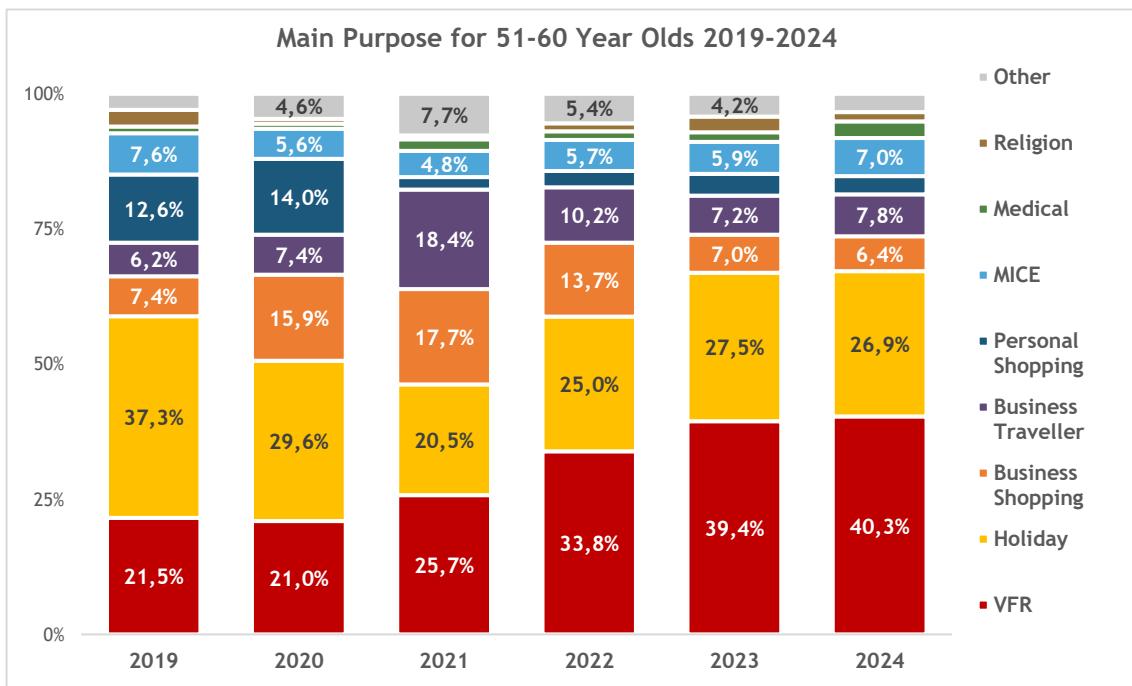
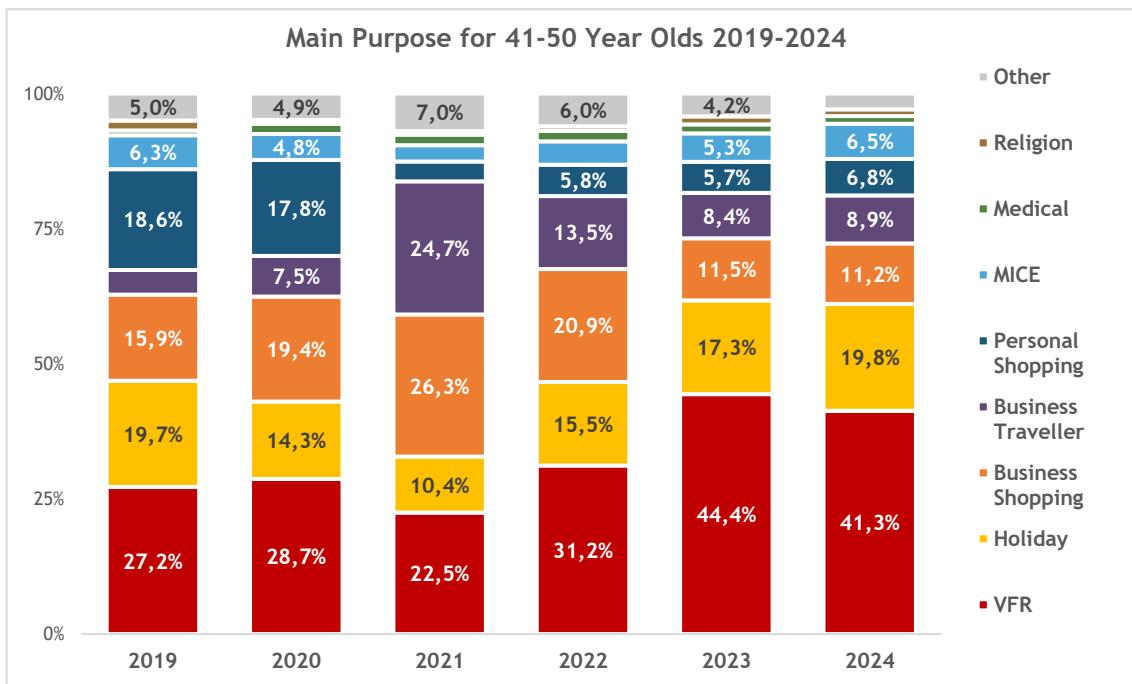
The distribution of responses on the purpose of the visit in 2024 is in line with the 2023 responses. Amongst the 31 - 34 year old age group, VFR remained the majority with a 53.2% share. Personal shopping and business shopping in the 31- 34 year old age group remained significantly lower than 2019 levels.

In the 35 - 40 year old age group, once again the distribution of responses year-on-year is incredibly stable. What is noted in this age group over the past six years is the emergence of business travellers which was very low in 2019. Business and personal shopping remain lower than 2019 levels as was noted in the 31 - 34 year age group.



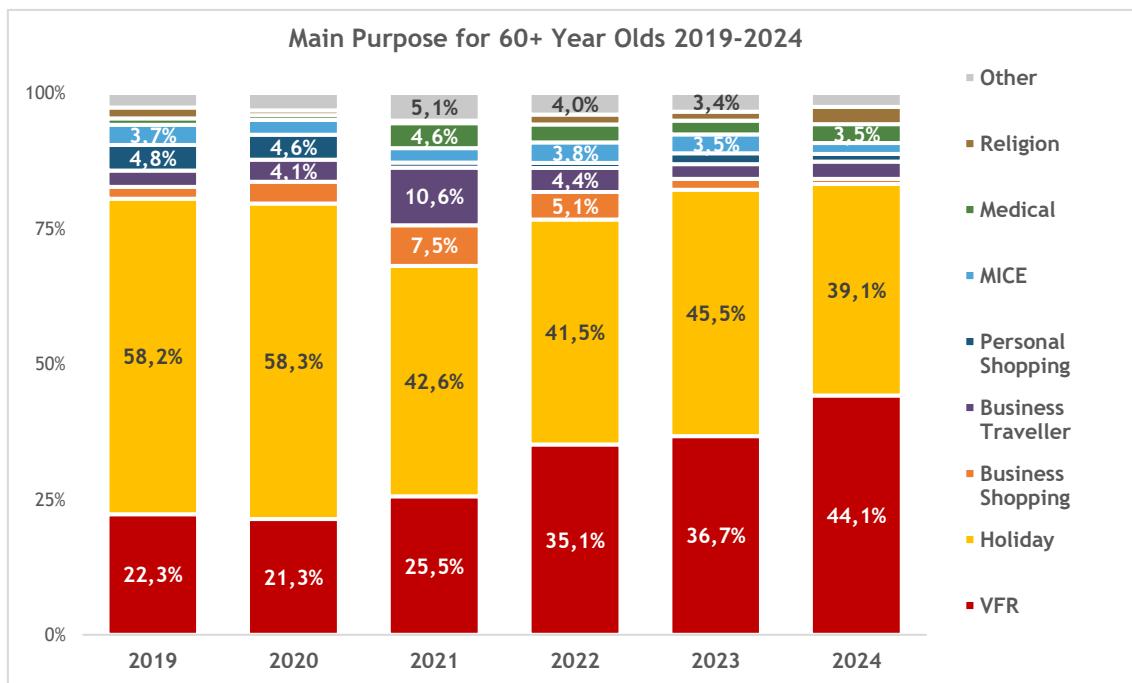


In 2023, as per the other age groups, a notable rise in the proportion of visitors for VFR is noted in comparison to 2019, however, these levels are consistent with 2023. Although VFR levels remain high in the 41-50 year and 51 - 60 old age groups, a steady growth is seen in holidaymakers over the past three years now accounting for 19.8% and 26.9%, respectively. Business shopping and personal shopping continued low relative to 2019 levels for both 41 - 50 and 51 - 60 year old age groups.





In 2024, the oldest age group (60+ year-olds), showed similar patterns to the other in that VFR has exceeded the 2019 levels reaching 44.1% share vs. 22.3% in 2019. Holidaymakers share, although it accounted for the largest proportion of visitors, is 39.1%, a -6.4 percentage points shortfall over 2023 levels. The main difference in this age group is that visiting for holidays is the biggest reason and not for VFR.



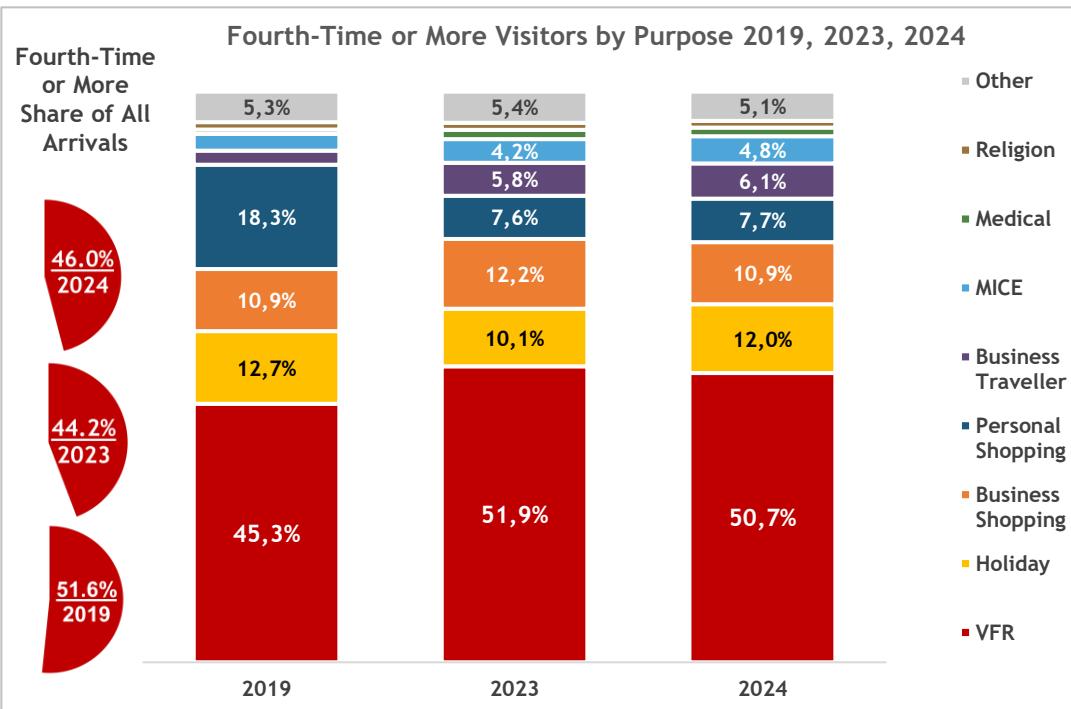
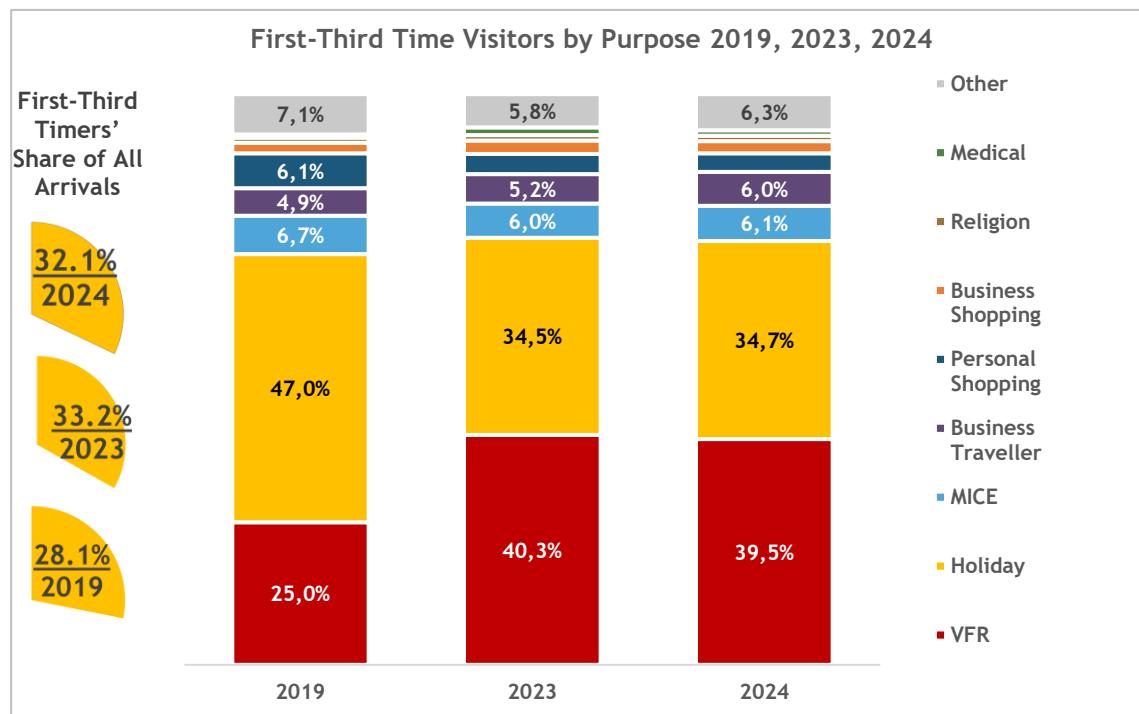
Travelers from Africa Land are generally younger, particularly in the 18-24 year old age group. Africa Air, Asia and Middle East visitors are in the younger to middle age groups between 25 - 50 years old. whereas travellers from Europe, the Americas, and Australasia skew to the older age groups of 51+ years.

Share of Arrivals by Age Group & Region 2024

2024 Age Bracket	All Arrivals	Africa Land	Africa Air	Europe	Americas	Asia	Australasia	Middle East
18-24 Years	13.5%	15.8%	6.8%	6.2%	7.0%	6.6%	6.5%	7.9%
25-30 Years	19.7%	21.3%	16.9%	14.6%	13.7%	20.0%	11.7%	18.1%
31-34 Years	16.9%	17.1%	21.3%	15.4%	14.5%	21.1%	13.7%	24.4%
35-40 Years	19.5%	19.7%	24.6%	18.4%	16.3%	21.5%	14.4%	18.6%
41-50 Years	19.8%	18.6%	20.3%	25.0%	22.4%	20.3%	24.1%	15.1%
51-60 Years	6.7%	5.1%	7.2%	11.6%	13.1%	6.8%	14.5%	9.9%
60+ Years	4.0%	2.4%	2.9%	8.8%	12.9%	3.6%	15.0%	6.1%



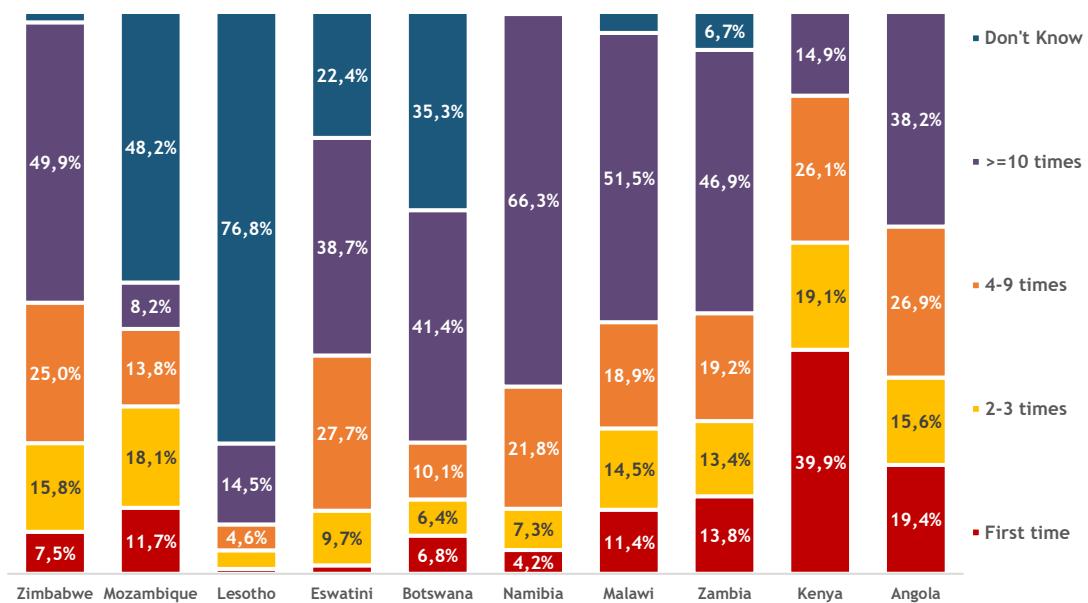
Repeat rates year-on-year are generally stable. In 2024, first-third time visitors amounted to almost a third (32.1%), and fourth-time or more constituting nearly half (46.0%) of all visitors to SA. Repeat rates coupled with travel purposes show a rebound in VFR tourism and a weaker recovery in holiday tourism. For first-third timers, business-related activities are consistent across 2024, 2023 and 2019. Whereas fourth-timers or more visitors in 2024 and 2023 noted a significant drop in personal shopping against 2019, on the contrary, it noted an increase in the last two years in business travellers and MICE.



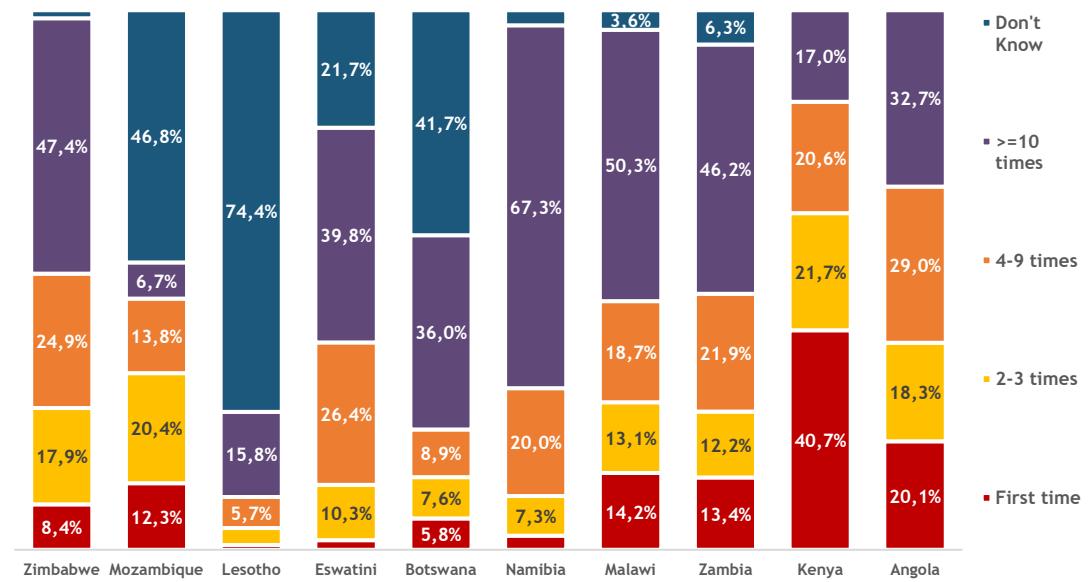


The patterns of repeat rates for 2024 are in line with 2023. The repeat rates by top African source markets reveal that the majority of visitors from neighbouring African countries (Zimbabwe, Mozambique, Lesotho, eSwatini, Botswana, Namibia, Zambia, and Malawi), have visited South Africa on multiple occasions with many of them not knowing how many times they have been to SA. Kenya had the highest proportion of first-time visitors to South Africa (39.9%), followed by Angola with 19.4% first-time visitors.

Africa Visitors' Repeat Rate by Top Ten Source Markets 2024



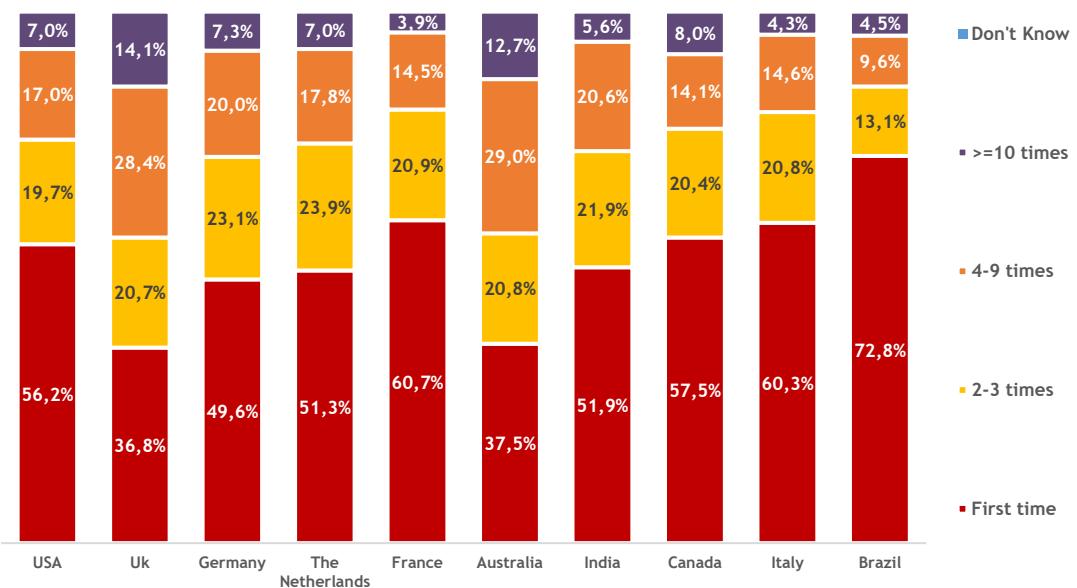
Africa Visitors' Repeat Rate by Top Ten Source Markets 2023



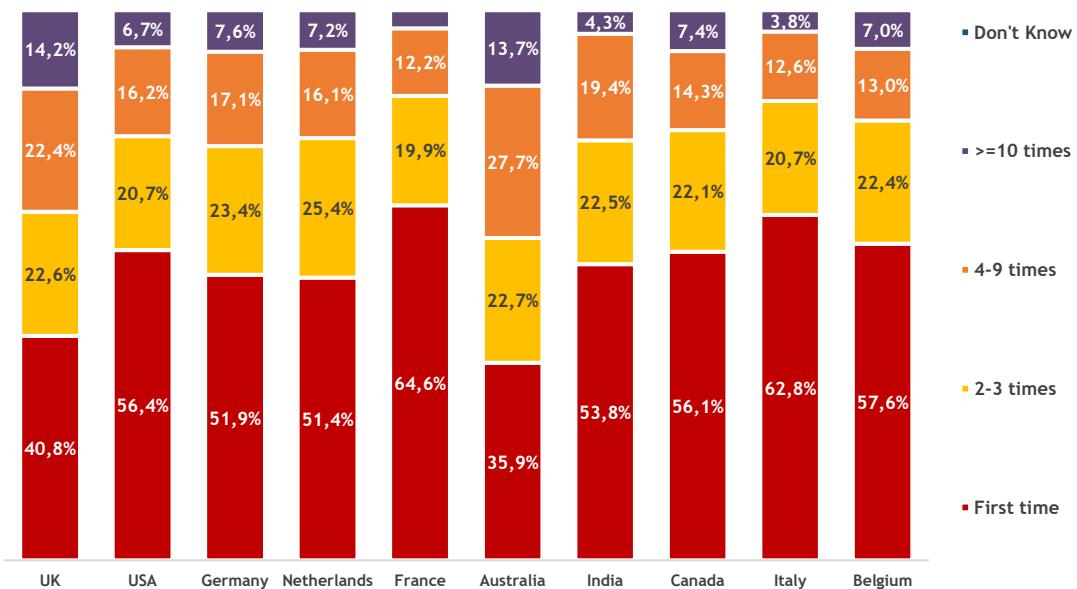


The distribution of responses between 2024 and 2023 is in line and consistent. Conversely, most overseas travellers visited South Africa for the first time. The majority of Australasia and UK visitors have visited more than once, for the obvious reason that these are South Africans returning to SA to visit friends and family. The country with the highest first-time visitors is Brazil (72.8%), followed by France (60.7%).

Overseas Visitors' Repeat Rate by Top Ten Source Markets 2024



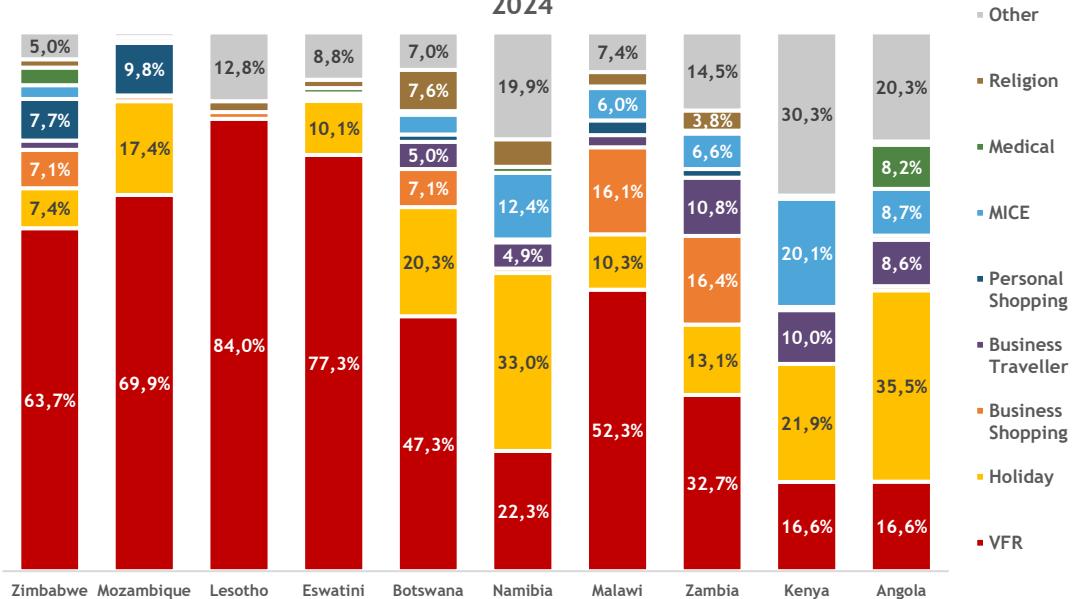
Overseas Visitors' Repeat Rate by Top Ten Source Markets 2023



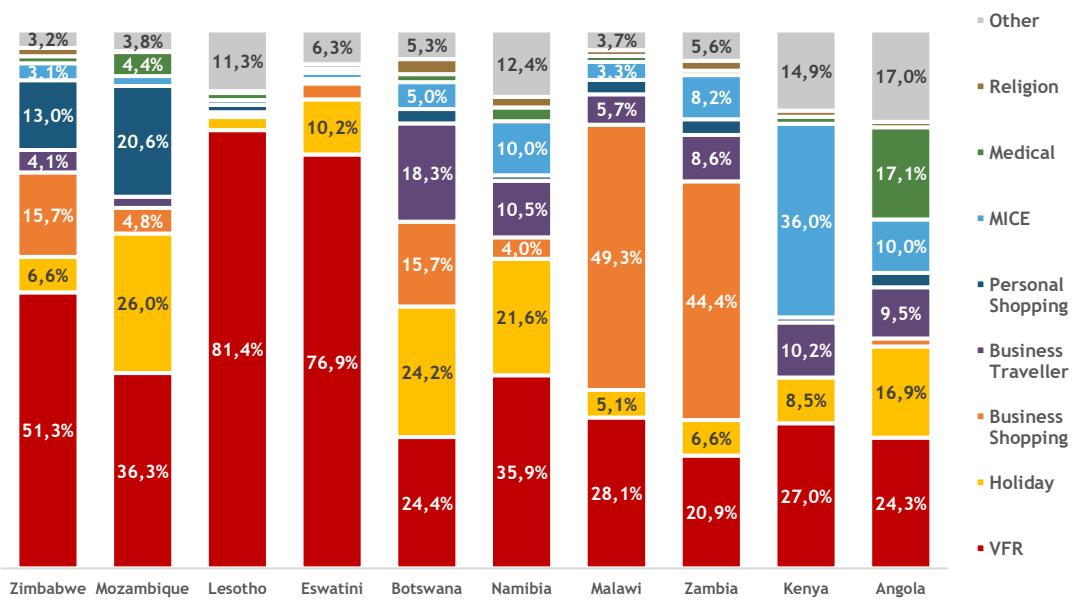


Among the top ten African source markets, first to third-time visitors from Mozambique and Zimbabwe predominantly visit for VFR, while for fourth or more visits, the purpose distribution changes, with VFR decreasing to less than half, and more visits being for holiday, business, and personal shopping. Visits from Lesotho and eSwatini are predominantly for VFR purposes, regardless of the number of visits. Holidaymakers are more prevalent among visitors from Angola, Namibia, and Kenya during their first to third visits, whereas for fourth or subsequent visits, an increase in business-related activities and personal shopping is noted. Zambia and Malawi have a high proportion of visitors for business shopping which increases substantially after the first third visit.

Top Ten Africa Source Markets First-Third Time Visitors by Purpose 2024



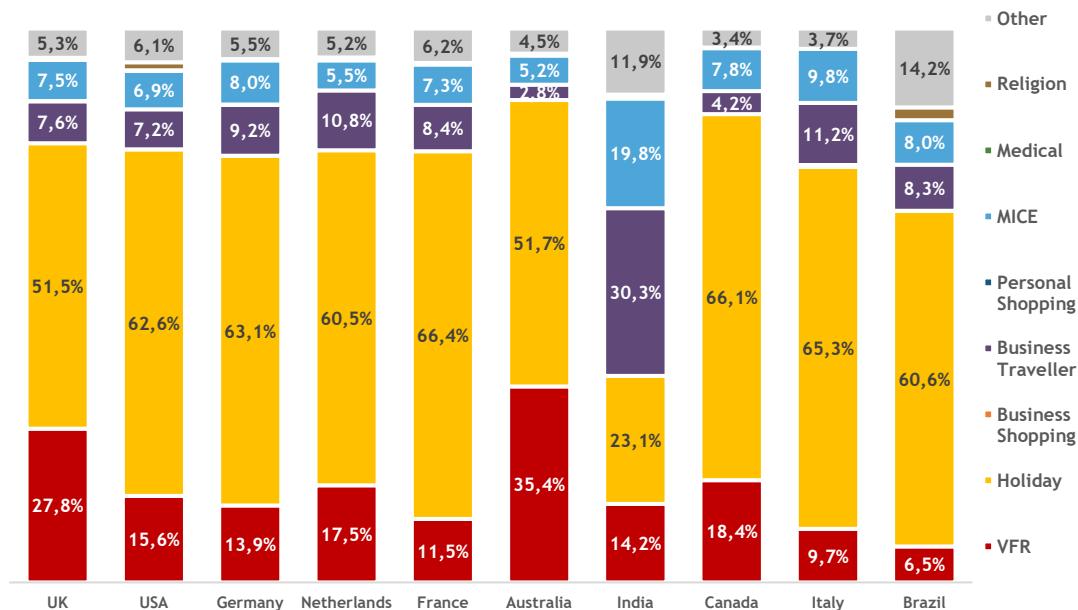
Top Ten Africa Source Markets Fourth or More Times Visitors by Purpose 2024



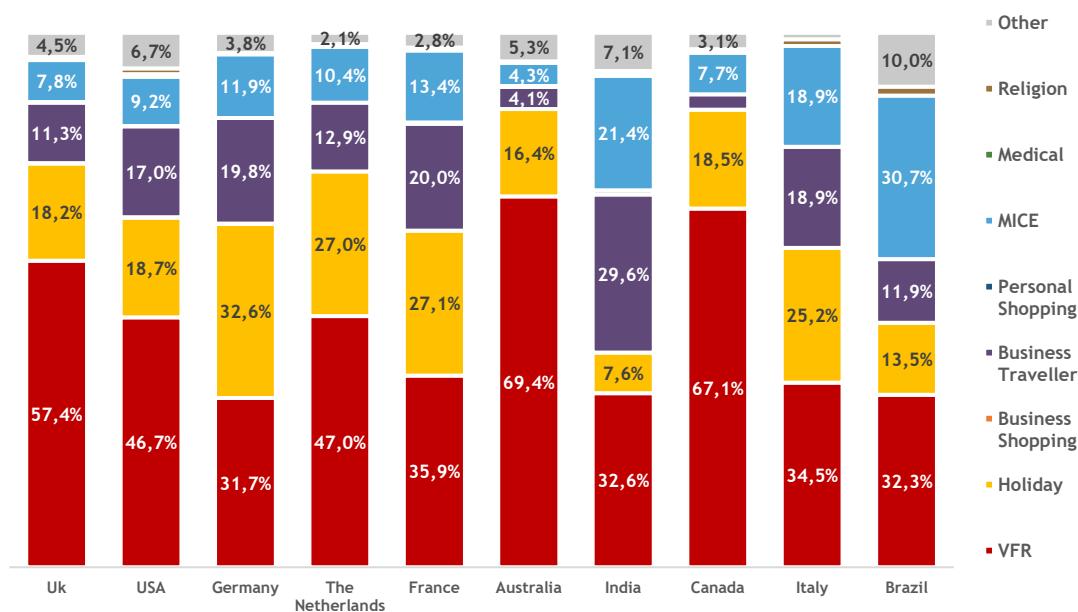


Overseas countries have a different distribution to visitors from Africa. In 2024, Australian visitors have the highest number of people visiting friends and relatives which increases in the fourth or more times. Visitors from India have a different distribution from the other countries in that the main reasons for visiting are business-related, however, this does change for fourth or more time visitors with VFR accounting for just over a third. The main purpose for first-third time visitors for all other source countries is holiday whereas for fourth or more time visitors the shift moves away from holiday to business related activities.

Top Ten Overseas Source Markets First-Third Time Visitors by Purpose 2024



Top Ten Overseas Source Markets Fourth or More Times Visitors by Purpose 2024



**TOTAL FOREIGN
DIRECT SPEND**

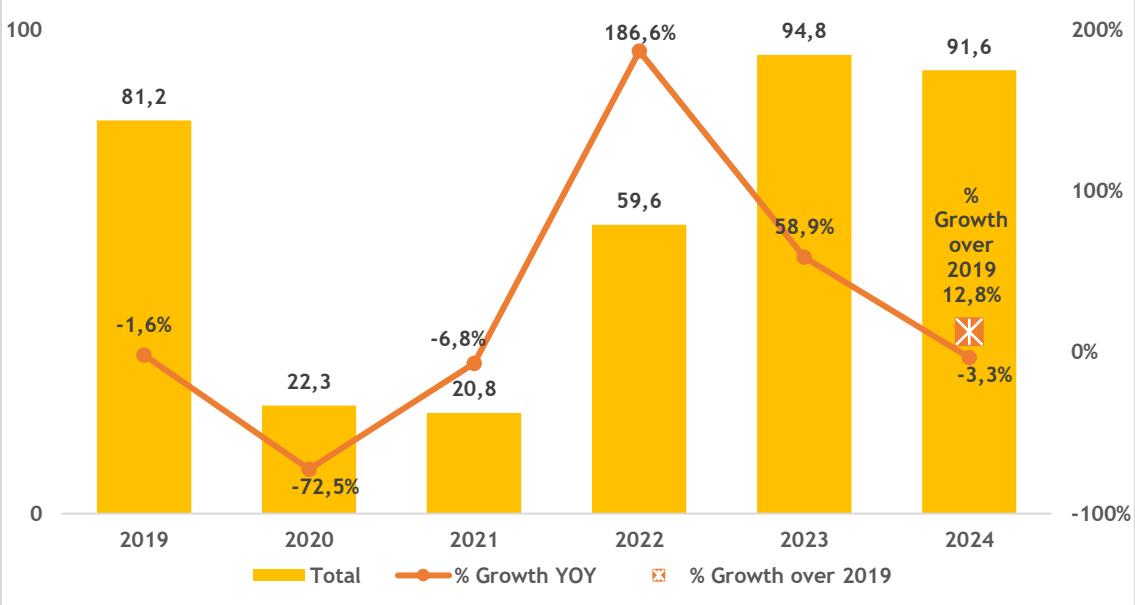


ZAR 91.6 BILLION

-3.3% 

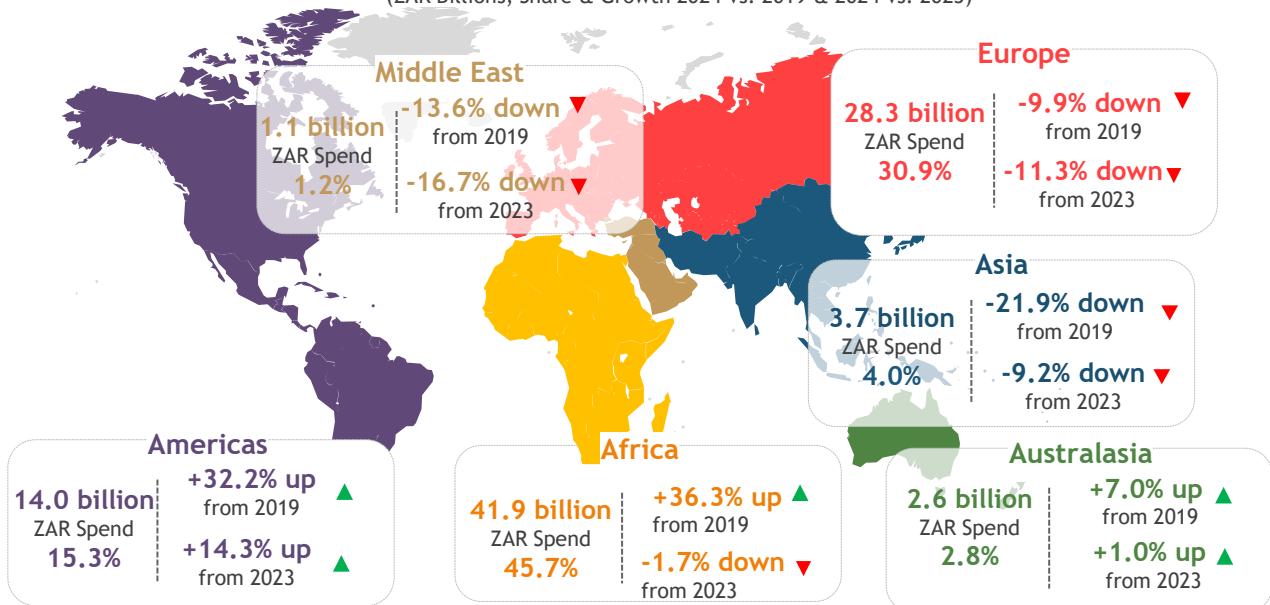
In 2024, the total foreign direct spend (TFDS) dropped marginally to ZAR 91.6 billion, a marginal *year-on-year decrease of -3.3%*. The share of spend from the Americas accounts for 15.3% and increased in 2024 by +14.3%. Australasia was the other region to have increased spend this year compared to 2023 by a small margin of 1.0%. Australasia's share of spend is very small accounting for 2.8% of total spend. All other regions total spend in 2024 dropped against 2023. The most notable drop was from the Middle East region (-16.7%), however, the total share of spend only accounted for 1.2%. The drop in Europe spend of -11.3% is probably the most significant this year as the share of spend from Europe accounted for 30.9% of total spend. Asia's spend also dropped by -9.2% and the spend from the Africa region dropped marginally by -1.7%, however, Africa spend accounted for 45.7% of total spend.

Foreign Spend 2019-2024 (ZAR Billion)



Foreign Direct Spend by Region 2024

(ZAR Billions, Share & Growth 2024 vs. 2019 & 2024 vs. 2023)



**TOTAL FOREIGN
DIRECT SPEND**



ZAR 91.6 BILLION

-3.3% 

Travellers from Africa Land account for the largest number of arrivals (72.6%), however, they only account for 45.7% of the total spend, resulting in a Spend to Arrivals ratio of 60.2%. Whereas Overseas accounts for only 24.0% of the total arrivals, it accounts for 54.3% of total spend - giving it a high Arrival to Spend ratio of 226.5%. Americas has the highest Spend to Arrival ratio of 269.7%.

Spend & Arrival Share & Ratio by Region 2024

Region	% of Arrivals	% of Spend	Ratio
	2024	2024	% Spend : % Arrivals
Africa	75.9%	45.7%	60.2%
Africa Land	72.6%	39.6%	54.5%
Africa Air	3.4%	6.2%	183.4%
Overseas	24.0%	54.3%	226.5%
Europe	14.1%	30.9%	218.9%
Americas	5.7%	15.3%	269.7%
Asia	2.3%	4.0%	173.3%
Australasia	1.3%	2.8%	212.8%
Middle East	0.5%	1.2%	236.3%

Spend & Arrival Share & Ratio by Region 2024

Region	Share 2019	Share 2023	Share 2024	Spend 2024	% Growth	% Growth
	(ZAR Billions)				2024-2019	2024-2023
Africa	37.8%	45.0%	45.7%	41.9	36.3%	-1.7%
Africa Land	32.0%	39.6%	39.6%	36.3	39.4%	-3.5%
Africa Air	5.8%	5.4%	6.2%	5.6	19.6%	10.8%
Overseas	62.2%	55.0%	54.3%	49.7	-1.5%	-4.6%
Europe	38.7%	33.7%	30.9%	28.3	-9.9%	-11.3%
Americas	13.1%	12.9%	15.3%	14.0	32.2%	14.3%
Asia	5.8%	4.3%	4.0%	3.7	-21.9%	-9.2%
Australasia	3.0%	2.7%	2.8%	2.6	7.0%	1.0%
Middle East	1.6%	1.4%	1.2%	1.1	-13.6%	-16.7%
All Arrivals	100.0%	100.0%	100.0%	91.6	12.8%	-3.3%

**TOTAL FOREIGN
DIRECT SPEND**

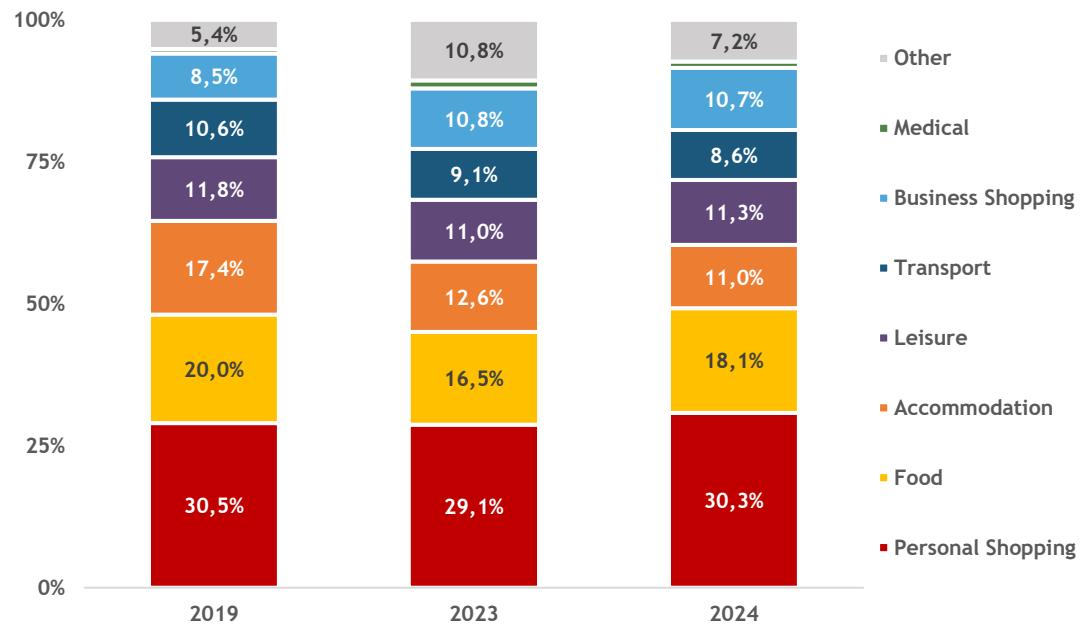


ZAR 91.6 BILLION

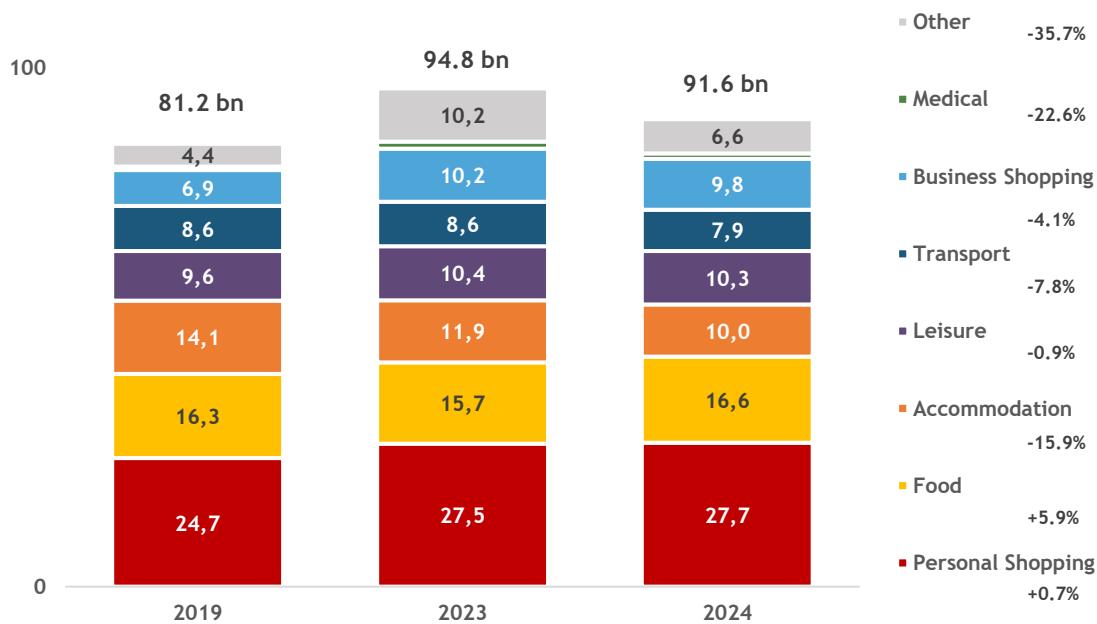
-3.3% 

The distribution of foreign direct spend across the various spend categories in 2024 is similar to 2023. In 2024, personal shopping spend dominates at 30.3%. Spend on food noted an increase of 1.6 pp against 2023, whereas spend on accommodation dropped by -1.6 pp.

Foreign Direct Spend Share by Category 2019 vs. 2024



Foreign Direct Spend by Category 2019, 2023, 2024
Growth % 2024 vs 2023



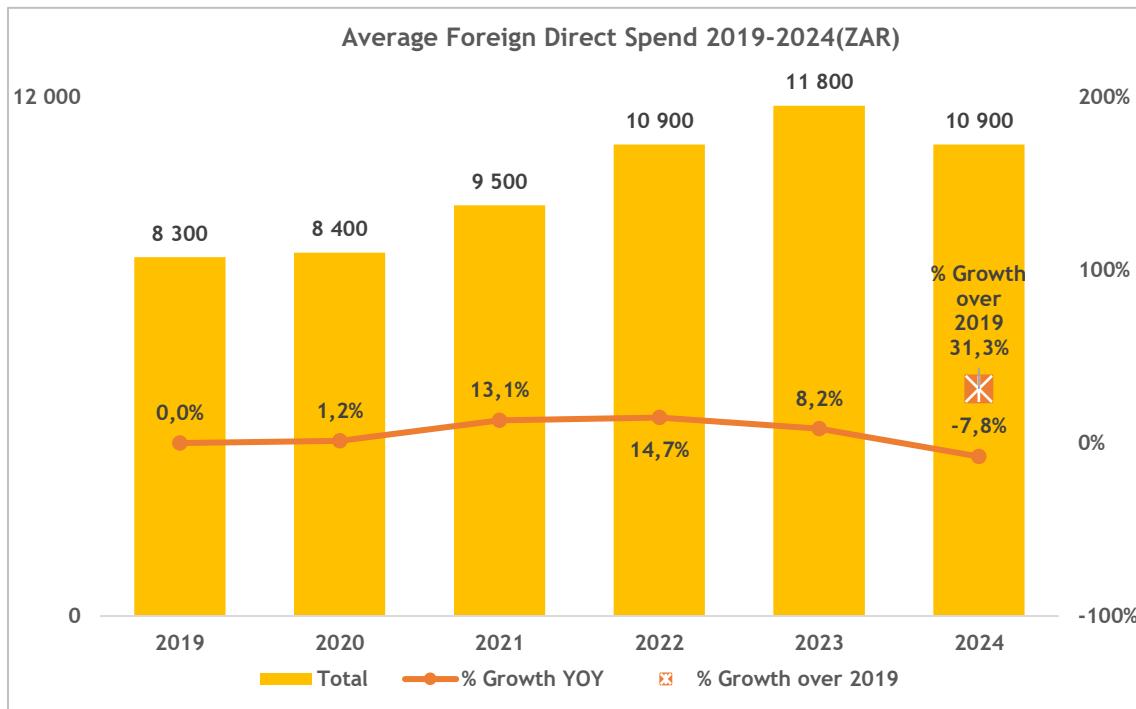
**TOTAL FOREIGN
DIRECT SPEND**



ZAR 91.6 BILLION

-3.3% ▼

The average spend in 2024 further dropped by -7.8% over 2023, amounting to an average of ZAR 10 900 per tourist. There was a significant variance between Africa Land and all other regions including Africa Air. Tourists visiting Africa Land spent an average of ZAR 5 800 in 2024, a -5.8% decrease against 2023. While those from all other regions spent between ZAR 21 300 and ZAR 30 100. The highest average spend was recorded by tourists from the Americas, who spent ZAR 30 100, marking a -4.7% decrease from 2023. The average spend decreased across all regions, with the exception of the Middle East.



Average Spend by Region 2019, 2023, 2024

Region	Average Spend (ZAR)			% Growth	% Growth
	2019	2023	2024	2019-2024	2023-2024
Africa	4 100	6 900	6 500	58.5%	-5.8%
Africa Land	3 600	6 300	5 800	61.1%	-7.9%
Africa Air	19 000	24 300	23 300	22.6%	-4.1%
Europe	22 900	28 300	24 900	8.7%	-12.0%
Americas	21 700	31 600	30 100	38.7%	-4.7%
Asia	17 500	24 600	21 300	21.7%	-13.4%
Australasia	20 300	25 700	23 500	15.8%	-8.6%
Middle East	27 000	27 600	28 700	6.3%	4.0%
All Arrivals	8 300	8 400	10 900	31.3%	-7.8%

LENGTH OF STAY

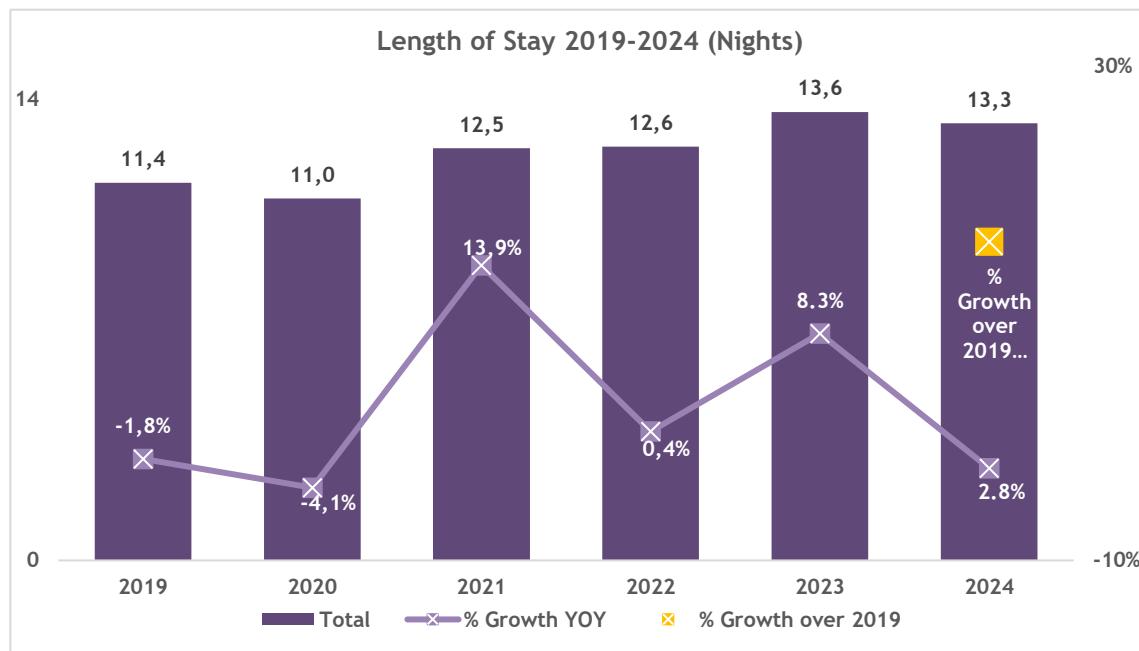


13.3 NIGHTS

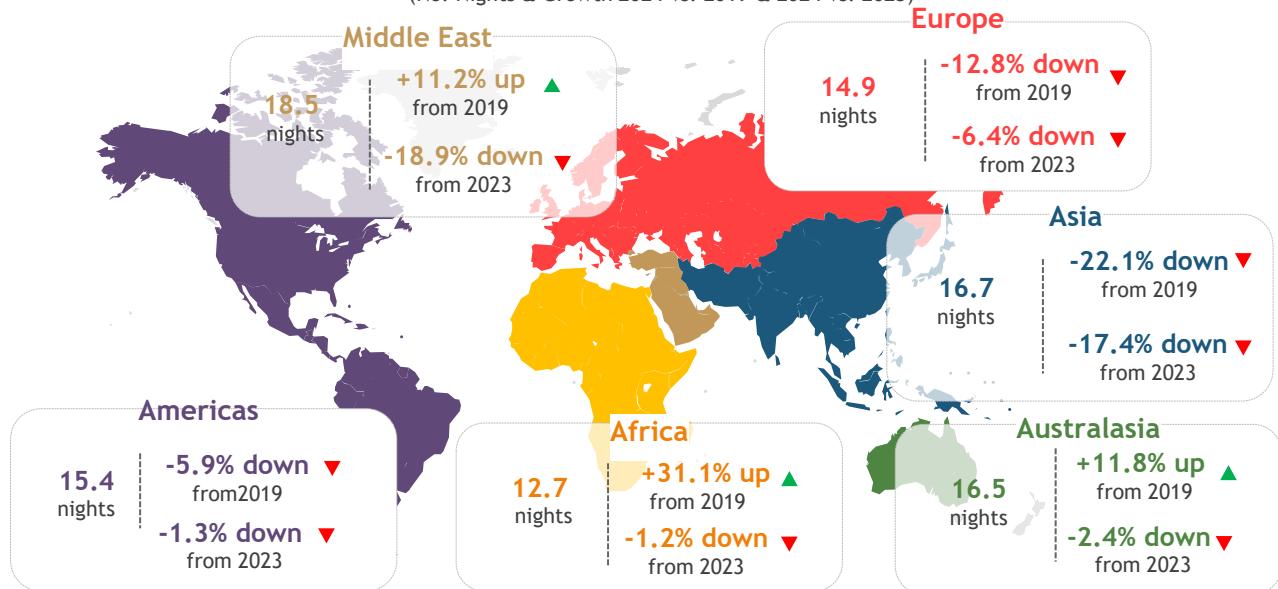
-2.6%

The average length of stay for international tourist arrivals increased steadily over the last four years reaching 13.3 days in 2024, a nominal drop of -2.8% compared to 2023. The average length of stay decreased across all regions in 2024 in comparison to 2023. The most notable year-on-year decreases emerged from the Middle East and Asia with decreases of -18.9% and -17.4%, however, Middle East tourists continued to record the longest average stay at 18.5 days.

The average length of stay increased over the years more than likely due to the rise of remote work which enabled travellers to combine work and leisure, allowing for extended stays at destinations. The year-on-year decreases being noted could be attributed to economic challenges, inflation, and weaker exchange rates making travel more expensive.



Length of Stay 2024
(No. Nights & Growth 2024 vs. 2019 & 2024 vs. 2023)



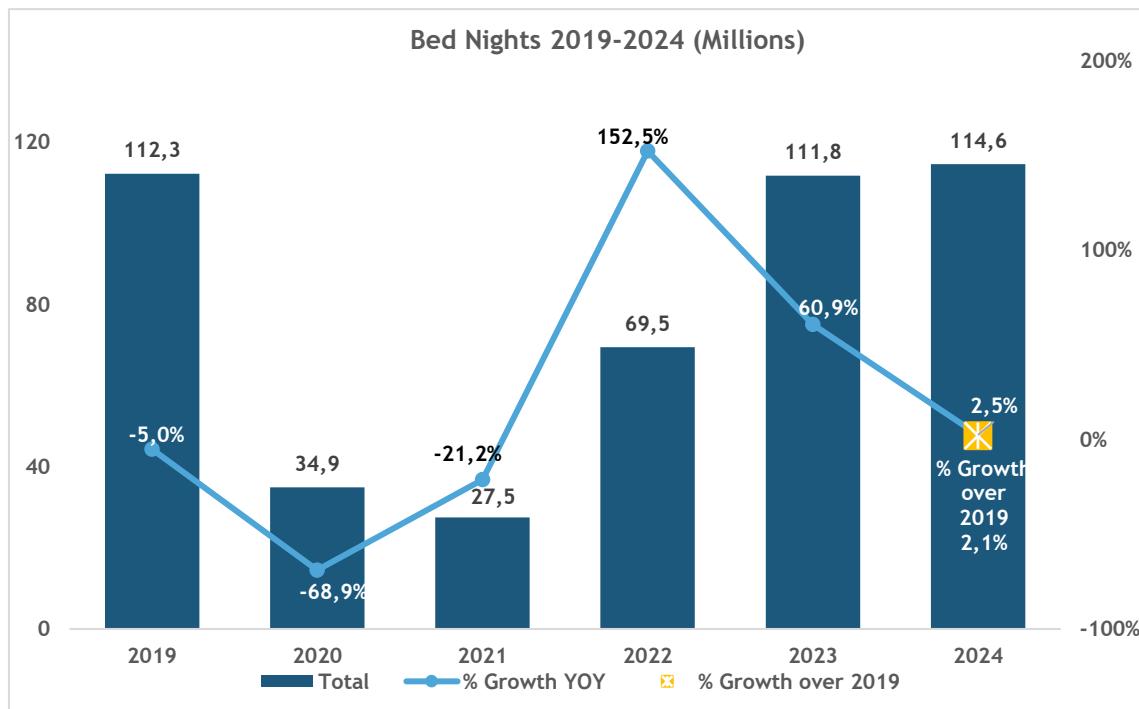
**TOTAL
BED NIGHTS**



114.6 MILLION

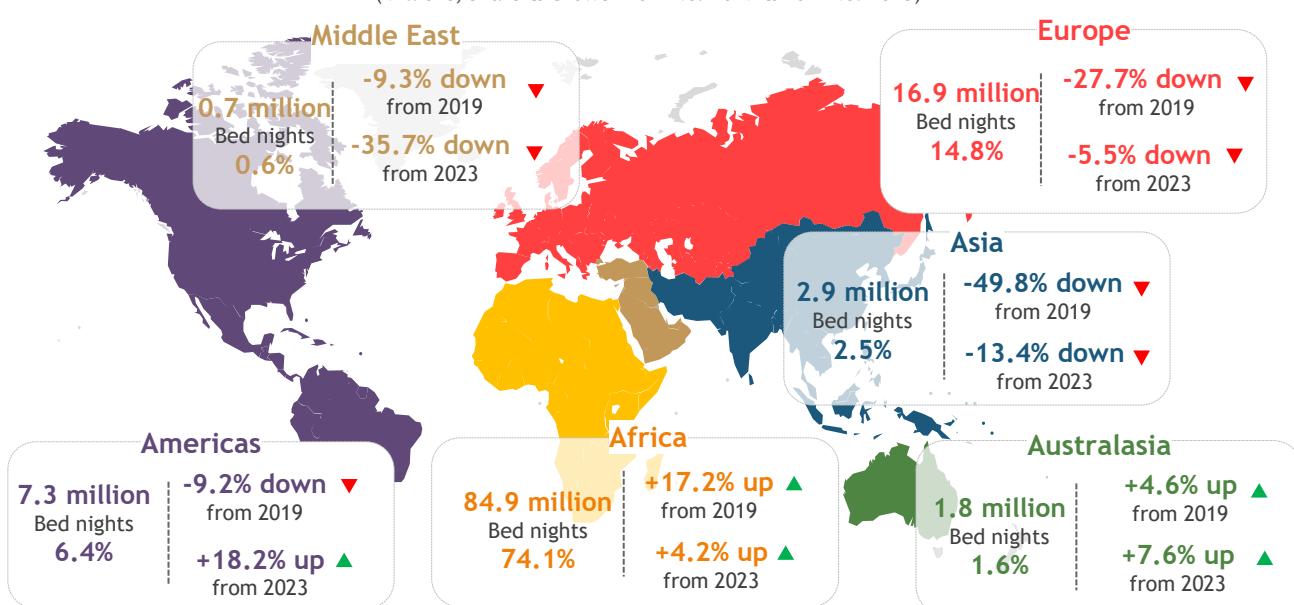
+2.5% 

The total bed nights for all arrivals in 2024 were 114.6 million, a marginal increase of +2.5% against 2023. Africa has the largest portion of bed nights at 74.1% this year following a growth of +4.2% against 2023. The Americas and Australasia region increased the number of bed nights during 2024 by +18.2% and +7.6%, respectively, against 2023. On the contrary, the Middle East, Asia and Europe decreased their number of bed nights by -35.7%, -13.4% and -5.5%, in that order. Geopolitical and economic instability in the Middle East and Europe, could be a factor in the reduction in the number of bed nights being noted during 2024.



Total Bed Nights 2024

(Millions, Share & Growth 2024 vs. 2019 & 2024 vs. 2023)



**TOTAL
BED NIGHTS**

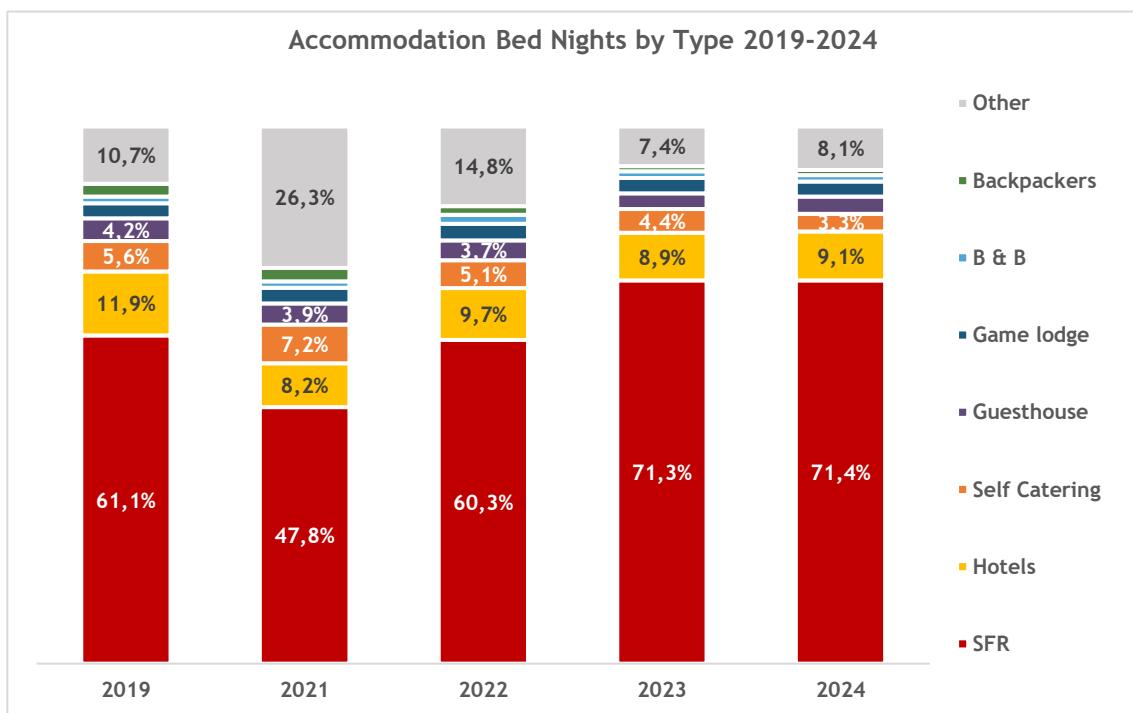


114.6 MILLION

+2.5% 

Similarly to 2023, this year the proportion of tourists staying with SFR remained predominant with a share of 71.4. A slight increase is noted in the number of bed nights associated with staying in hotels by +5.5% year on year. During 2024, a steep drop (-24.3% against 2023) in bed nights at self-catering accommodation is noted. On the contrary, the number of bed nights for Guesthouse noted a strong increase of +14.7%.

Accommodation Bed Nights by Type 2019-2024



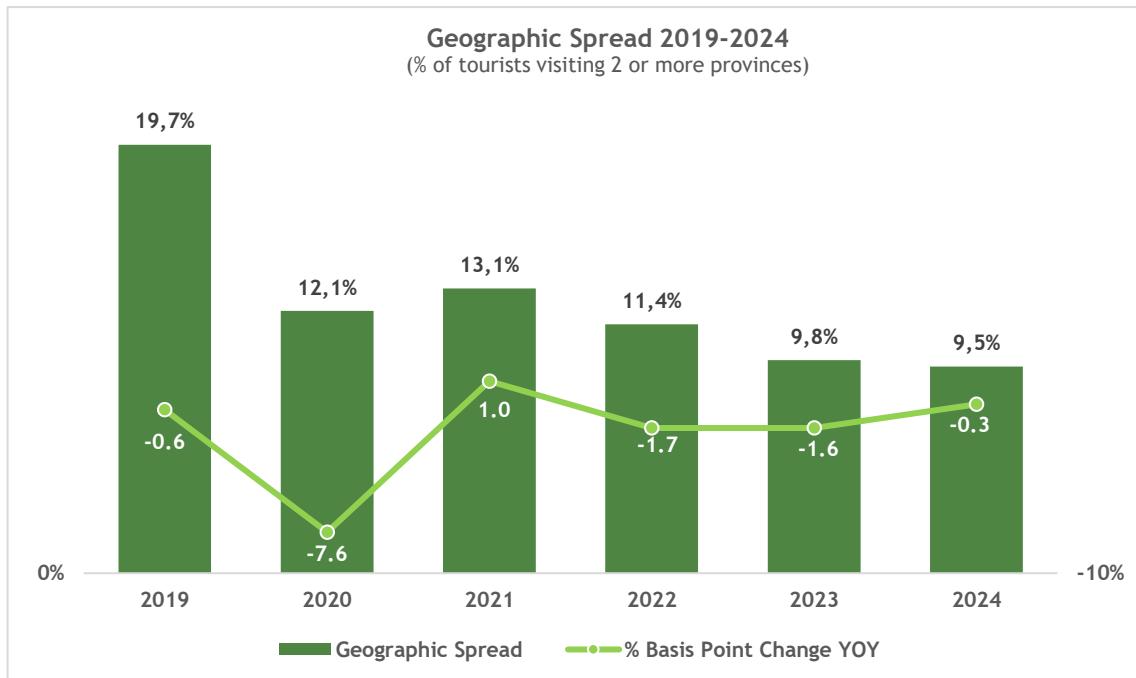
Total Bed Nights by Accommodation Type 2019, 2023 & 2024

Actual, Share & Growth 2024 vs 2019 & 2024 vs 2023

Accommodation	2019	2023	2024	% Share 2023	% Share 2024	% Growth 2019-2024	% Growth 2023-2024
 SFR	68.6	79.7	81.8	71.3%	71.4%	19.2%	2.6%
 Hotels	13.4	9.9	10.5	8.9%	9.1%	-21.8%	5.5%
 Self Catering	6.3	5.0	3.8	4.4%	3.3%	-40.3%	-24.3%
 Guesthouse	4.7	3.2	3.7	2.9%	3.2%	-21.7%	14.7%
 Game lodge	3.2	3.2	3.2	2.9%	2.8%	-0.2%	-0.3%
 Backpackers	2.7	1.1	1.1	0.9%	0.9%	-59.8%	-1.4%
 B&B	1.9	1.4	1.4	1.3%	1.2%	-26.7%	-0.5%



South Africa's geographic spread index (the share of tourists that travel to two or more provinces) in 2024 continued to decline recording the lowest geographic spread in the past six years at 9.5%. Regional analysis of the geographic spread varies greatly between Africa and Overseas. In 2024, African tourists on average visited one province in 2024, whereas Overseas tourists visit an average of 1.5 provinces. Overseas regions have a much higher geographic spread than Africa ranging from 40.8% (Australasia) to 17.4% (Middle East). This variation between Africa and Overseas is clear when looking at the main purpose for travel and the economic spend capacity for each of the regions. Australasia and the Americas recorded the highest number of mean provinces visited at 1.6, where their main purpose is holiday and leisure.



Geographic Spread & Number of Provinces Visited 2024

Region	Geographic Spread 2024	Geo Spread pp vs. 2019	Geo Spread 2023	Mean Provinces Visited 2024
Africa	2.6%	-2.1	-0.2	1.0
Africa Land	2.3%	-2.1	-0.2	1.0
Africa Air	9.9%	-2.6	-0.2	1.1
Overseas	33.6%	-7.6	-0.5	1.5
Europe	33.8%	-7.8	-0.5	1.5
Americas	36.9%	-9.1	0.8	1.6
Asia	22.2%	-10.1	-3.4	1.3
Australasia	40.8%	2.6	0.1	1.6
Middle East	17.4%	-22.0	-11.1	1.2
All Arrivals	9.5%	-10.2	-0.3	1.1

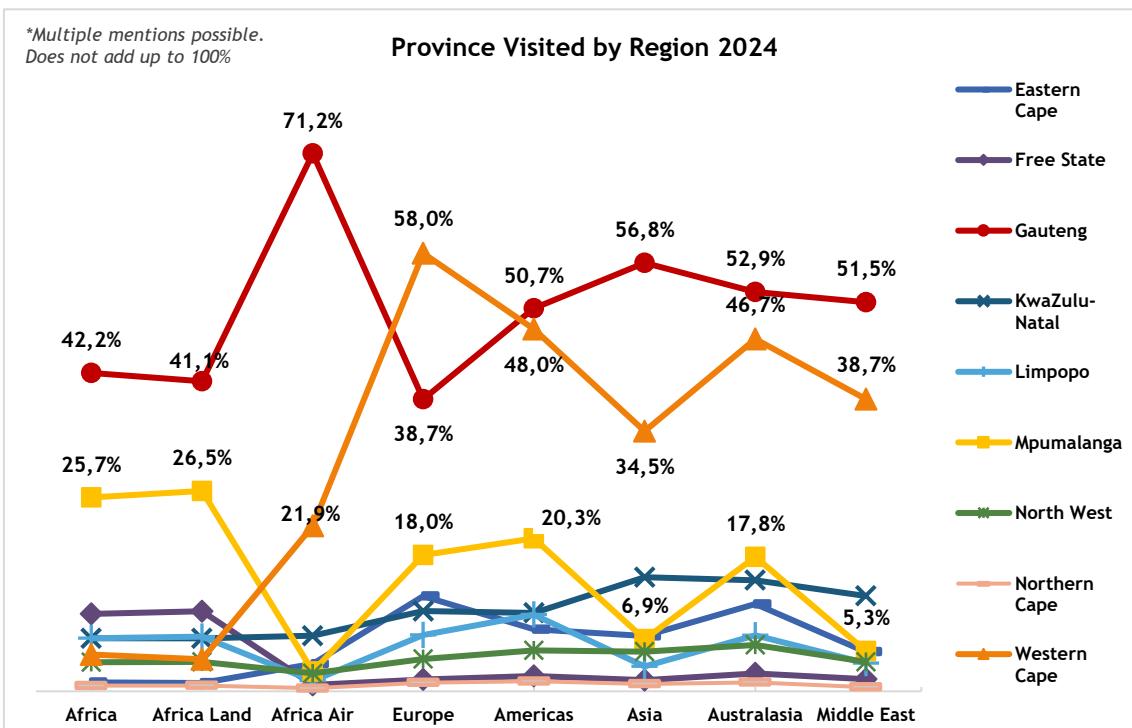
*Change in percentage points vs. 2023.



In 2024, the main provinces for Africa Land are Gauteng and Mpumalanga which correlate the main source markets are their geographic location to neighboring countries. Whereas Africa Air's main province visited is Gauteng which is the main airport hub for Africa Air travel. European travellers key province is the Western Cape, given their purpose of travel and visiting key attractions in South Africa. American and Australasian travellers visited the Gauteng and Western Cape provinces equally, as they probably fly directly in the Gauteng airport hub and then travel onto the Western Cape. Asia and Middle East travellers predominately visit the Gauteng province with the second purpose for travel being business and MICE.

*Multiple mentions possible.
Does not add up to 100%

Province Visited by Region 2024



The share distribution of visitors across the various cities remained stable against 2024. Johannesburg remained the city with the largest share (28.3%) in 2024, followed by Cape Town (14.8%).

Top 15 Cities & Share of International Visitors				
	2023	2024	2023	2024
Johannesburg	29.1%	28.3%	Mesina	3.2%
Cape Town	14.6%	14.8%	Kruger National Park	3.4%
Pretoria	7.1%	7.8%	Simon's town	2.6%
Nelspruit	6.4%	7.6%	Hermanus	2.5%
Stellenbosch	6.0%	6.4%	Port Elizabeth	2.8%
Malalane	5.0%	5.5%	Knysna	2.6%
Durban	5.1%	5.4%	Bloemfontein	2.8%
Sandton	4.3%	5.0%		2.5%

*Change in percentage points vs. 2023.

SATISFACTION RATING

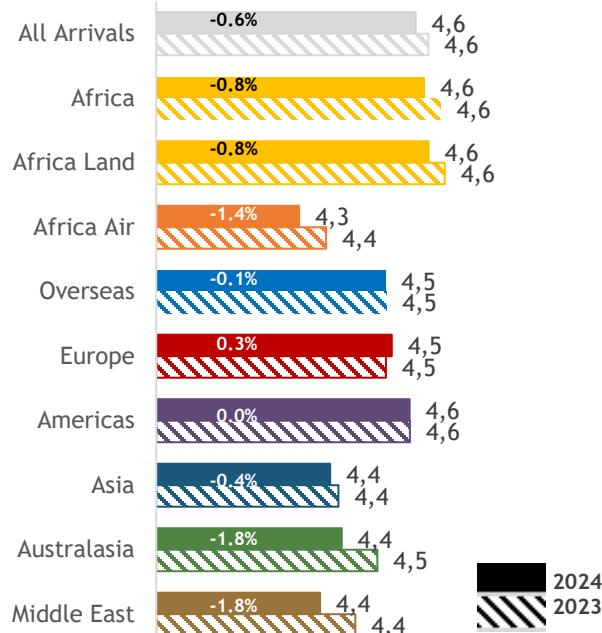


4.6

-0.6%

In 2024, international tourists' overall satisfaction with South Africa remained stable year-on-year, achieving a satisfaction rating of 4.6. Satisfaction among tourists from Africa Air, Australasia and the Middle East decreased year-on-year by -1.4%, -1.8, -1.8%, respectively. The two attributes most poorly rated by Africa Air was Police Services and Safety & Security, whereas Australasia and Middle East rated the roads and safety & security most poorly. Arrivals from Africa Land and the Americas provided the highest overall rating at 4.6 during 2024. Our natural attractions and restaurants were the highest rated aspects by Africa Land arrivals. Whereas, for the Americas the top 2 rated were our natural attractions and tour guides. In 2024, South Africa's tour guides and as is expected our natural

Overall Satisfaction & Growth 2024 vs. 2023



attractions continued to score highly across all regions, particularly among overseas visitors. South African restaurants jumped into the top 3 rated during 2024. Overseas visitors rated friendly people and value for money highly. Safety and security were the lowest-rated factors, with scores not exceeding 3.9 across all regions.

	All Arrivals	Africa	Africa Land	Africa Air	Overseas	Europe	Americas	Asia	Australasia	Middle East
Overall satisfaction	4.6	4.6	4.6	4.4	4.5	4.5	4.6	4.4	4.5	4.4
Tour guides	4.7	4.5	4.4	4.5	4.7	4.7	4.8	4.6	4.7	4.8
Natural Attractions	4.7	4.6	4.6	4.6	4.8	4.8	4.8	4.7	4.8	4.8
Restaurants	4.6	4.6	4.7	4.5	4.6	4.6	4.6	4.5	4.6	4.6
Accommodation	4.5	4.5	4.5	4.5	4.6	4.5	4.6	4.5	4.5	4.6
Availability of Information	4.5	4.5	4.5	4.5	4.5	4.5	4.6	4.4	4.4	4.5
Customs	4.5	4.5	4.5	4.4	4.5	4.5	4.5	4.4	4.3	4.6
Visitor Information Centres	4.5	4.4	4.4	4.5	4.5	4.5	4.6	4.4	4.5	4.6
Public Transportation	4.4	4.5	4.5	4.4	4.3	4.4	4.4	4.2	4.2	4.0
Friendly People	4.4	4.3	4.3	4.3	4.7	4.7	4.7	4.5	4.6	4.6
Immigration	4.4	4.4	4.4	4.3	4.4	4.4	4.5	4.4	4.3	4.5
Mobile & Internet network	4.4	4.5	4.5	4.4	4.2	4.2	4.2	4.1	4.2	4.2
Value for money	4.4	4.3	4.3	4.3	4.6	4.6	4.7	4.4	4.6	4.4
Domestic Flights	4.4	4.1	4.1	4.4	4.5	4.5	4.5	4.4	4.5	4.4
Roads	4.3	4.5	4.5	4.4	3.8	3.8	3.9	3.9	3.5	3.8
Water	4.3	4.4	4.3	4.5	4.2	4.2	4.3	4.2	4.1	4.2
Police Services	4.3	4.3	4.3	4.2	4.2	4.2	4.1	4.0	4.0	3.9
Electricity	4.1	4.1	4.1	4.3	4.1	4.0	4.2	4.1	4.1	4.1
Safety and Security	3.9	3.9	3.9	3.8	3.8	3.8	3.9	3.5	3.7	3.5



Inspiring new ways

INTERNATIONAL TOURISM: KEY REGIONS PERFORMANCE

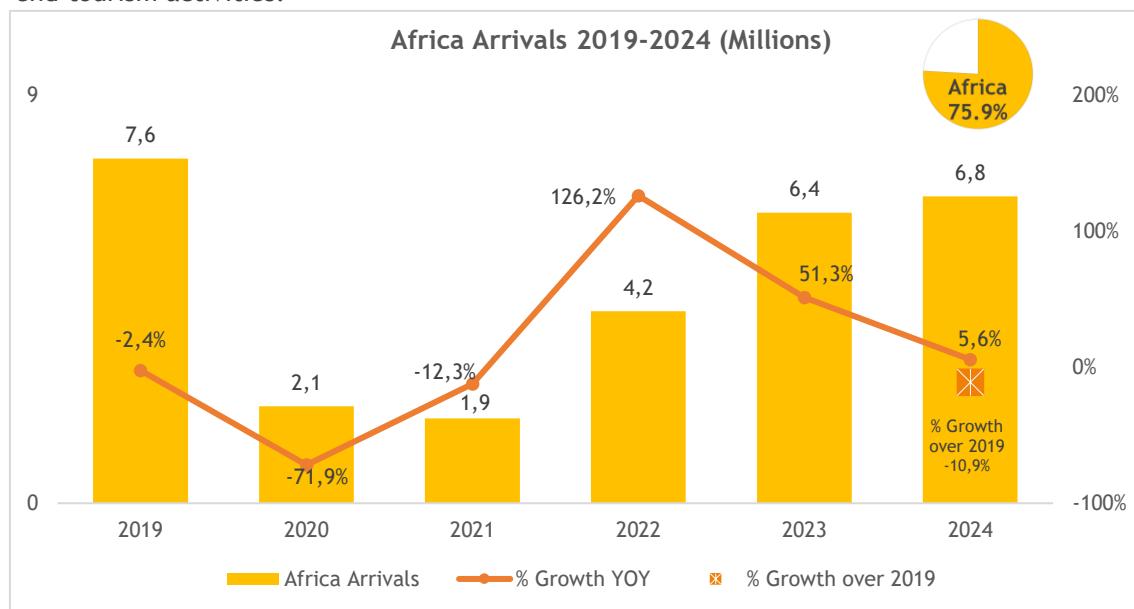


AFRICA ARRIVALS

6.8 M

+5.6% ▲

In 2024, Africa arrivals continued to strengthen reaching a total of 6.8 million arrivals, marking a +5.6% increase against 2023. International tourist arrivals into South Africa are mainly from Africa, noting a predominant share of 75.9% in 2024. The top two age categories representing arrivals from Africa are 25 - 30 years old (21.1%) and 35-40 years old (19.9%). These tourists primarily visited for VFR (60.5%) and a small proportion for holidays (8.9%). Tourists primarily stayed with friends and family (83.2%) for an average of 12.7 nights, which is reflected in the relatively low average spend of ZAR 6 500, a decrease of -5.8% year-on-year. Despite the overall increase in arrivals, the total spend is relatively low as a ratio. The total spend in 2024 marked ZAR 41.9 billion, a drop of -1.7% against 2023. This level of spend represented 45.7% of the total tourist spend. Africa tourists tend to have a low geographic spread of 2.6% and tend to visit an average of 1 province, which is predominately Gauteng or Mpumalanga. Tourists typically visited an average of one province, Gauteng (42.2%) and Mpumalanga (25.7%) were the most visited provinces. Tourists arrive mainly from Zimbabwe (32.2%), Mozambique (23.5%), Lesotho (14.4%) and eSwatini (-16.3%). The dominance of younger age groups and VFR travel indicates strong cross-border family ties and economic migration patterns driving tourism. The low spend per tourist reflects the nature of these visits, emphasising visits to relatives rather than high-end tourism activities.



Africa Tourist Arrivals by Top Ten Markets 2024

Africa Top 10 Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
Zimbabwe	2 106 940	2 183 260	29.7%	32.9%	32.2%	-3.6%	-3.3%
Mozambique	1 341 037	1 591 751	17.5%	20.9%	23.5%	+13.7%	+19.4%
Lesotho	1 163 826	974 369	20.6%	18.2%	14.4%	-16.3%	-37.7%
Eswatini	733 949	842 318	12.1%	11.4%	12.4%	+14.8%	+8.2%
Botswana	363 025	395 965	8.8%	5.7%	5.8%	+9.1%	+40.8%
Namibia	160 078	164 716	2.4%	2.5%	2.4%	+2.9%	+0.7%
Malawi	138 918	163 726	2.6%	2.2%	2.4%	+17.9%	+7.8%
Zambia	145 244	154 921	2.0%	2.3%	2.3%	+6.7%	+1.9%
Kenya	42 403	47 852	0.4%	0.7%	0.7%	+12.9%	+57.8%
Angola	39 265	37 811	0.8%	0.6%	0.6%	-3.7%	-39.0%
All Africa Arrivals	6 410 392	6 770 664	74.3%	75.6%	75.9%	+5.6%	+10.9%

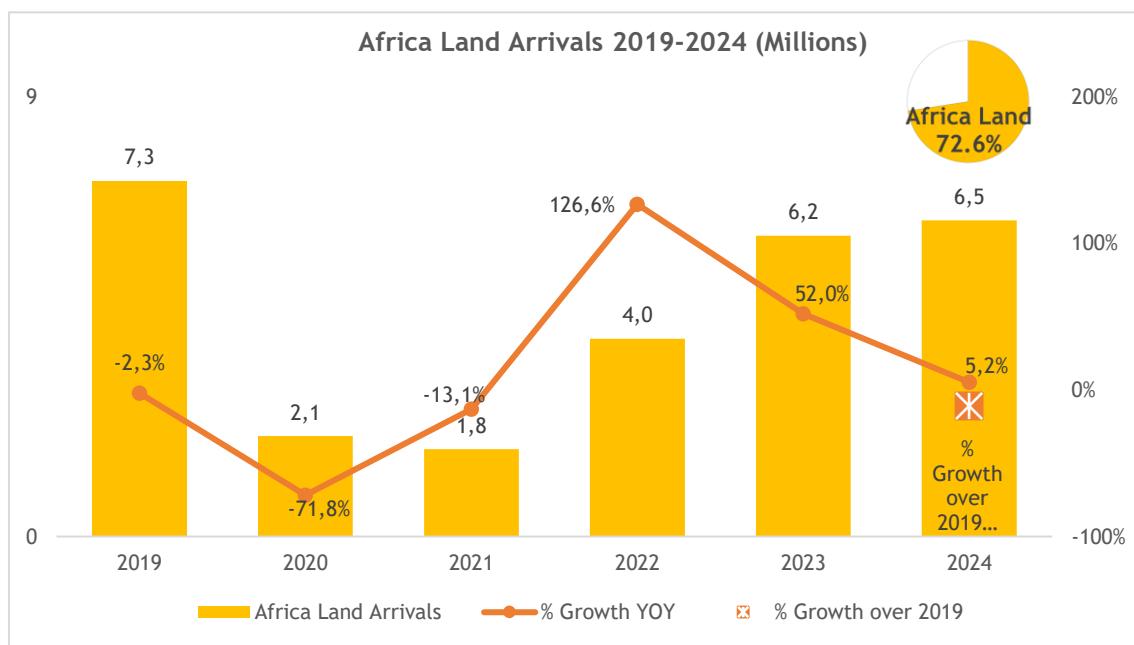
AFRICA

2024

Growth / PP Change
2023-2024Growth / PP Change
2019-2024

	Arrivals	Million	0.2	4.2%	-33.3%
	Share of Arrivals		2.3%	0.0	-0.7
	Top 2 Age Groups	25-30 years	21.1%	-0.4	-4.9
		35-40 years	19.9%	0.6	0.0
	Top 2 Main Purposes	VFR	60.5%	-0.6	12.2
		Holiday	8.9%	1.9	-1.3
	Spend	ZAR Bn	<u>41.9</u>	<u>-1.7%</u>	<u>36.3%</u>
	Share of Spend		45.7%	0.7	7.9
	Average Spend	ZAR	6 500	-5.8%	58.5%
	Length of Stay	nights	<u>12.7</u>	<u>-1.2%</u>	<u>31.1%</u>
	Top 2 Accommodations	SFR	83.2%	-0.6	2.9
		Hotels	4.1%	0.2	-0.1
	Geographic Spread	2 provinces or more	2.6%	-0.2	-2.1
	No. Provinces		1.0	-0.2%	-2.4%
	Top 2 Provinces	Gauteng	42.2%	-1.5	11.5
		Mpumalanga	25.7%	2.7	9.4
	Satisfaction	out of 5	<u>4.6</u>	<u>0.8%</u>	<u>3.2%</u>

Africa Land arrivals continued to constitute the majority of international arrivals into South Africa, accounting for an incredible 72.6%. During 2024, the total number of arrivals from Africa Land increased by a further +5.2%, totalling 6.5 million arrivals. Arrivals from Africa arriving via land are spread across most age categories but skew younger to the 25 - 30 years old (21.3%) and 35-40 years old (19.7%). These tourists primarily visited for VFR (61.8%) and a small proportion for business shopping (6.8%). Although Africa Land constituted a large portion of arrivals, their total spend only amounted to ZAR 36.3 billion, a -3.5% decrease year-on-year and an average spend of ZAR 5 800, a -7.9% drop against 2023. The Africa Land arrivals to spend ratio has deteriorated year-on-year. An overwhelming majority (85.3%) stay with friends and relatives, and they tend to stay for an average of 12.6 nights. The geographic spread of Africa land arrivals is incredibly low at 2.3% and the two key provinces being visited are Gauteng (41.1%) and Mpumalanga (26.5%) which are the provinces easily accessible via neighbouring countries. The top source markets for the region included Zimbabwe (33.7%), Mozambique (24.6%), Lesotho (15.1%), and eSwatini (13.0%). Year-on-year all of the top 10 source countries noted increases, the only exception was Lesotho which declined by -16.3%. As reflected in the Africa summary, the dominance of younger age groups and VFR travel indicates strong cross-border family ties and economic migration patterns driving tourism. The low spend per tourist reflects the nature of these visits, emphasizing visits to relatives rather than high-end tourism activities.



Africa Land Tourist Arrivals by Market 2024

Africa Land Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
Zimbabwe	2 106 940	2 183 260	22.1%	34.2%	33.7%	3.6%	-3.3%
Mozambique	1 341 037	1 591 751	13.0%	21.8%	24.6%	18.7%	19.4%
Lesotho	1 163 826	974 369	15.3%	18.9%	15.1%	-16.3%	-37.7%
eSwatini	733 949	842 318	9.0%	11.9%	13.0%	14.8%	-8.2%
Botswana	363 025	395 965	6.5%	5.9%	6.1%	9.1%	-40.8%
All Africa Land Arrivals	6 153 017	6 471 026	71.1%	72.5%	72.6%	5.2%	-11.1%



AFRICA LAND

2024

Growth / PP Change
2023-2024Growth / PP Change
2019-2024

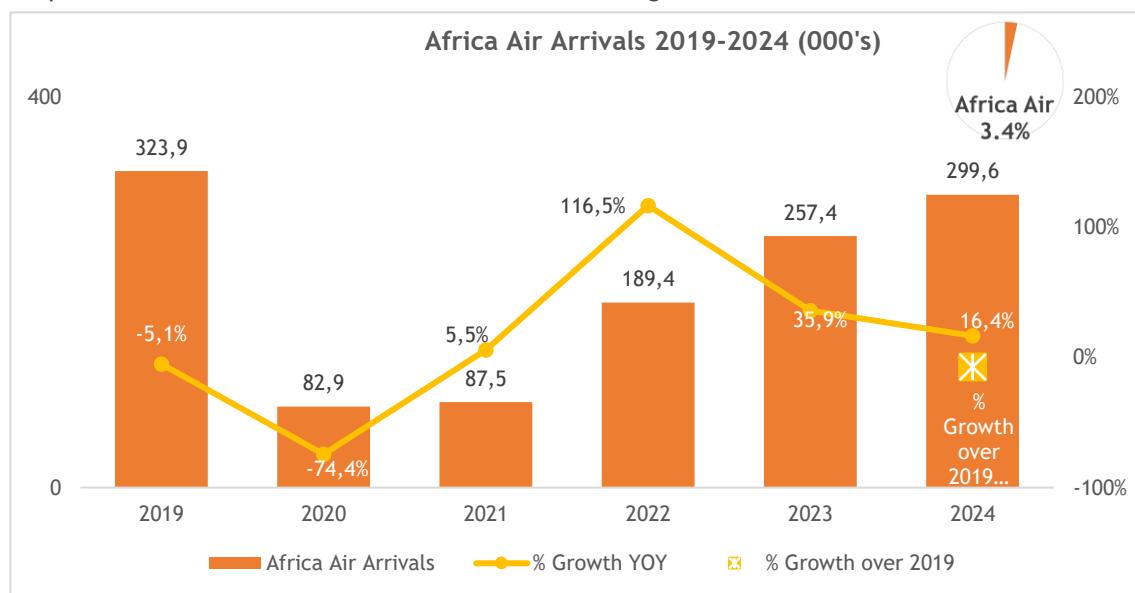
	Arrivals	Million	<u>6.5</u>	<u>5.2%</u>	<u>-11.1%</u>
	Share of Arrivals		72.6%	0.0	1.4
	Top 2 Age Groups	25-30 years	21.3%	-0.5	-5.0
		35-40 years	19.7%	0.5	-0.2
	Top 2 Main Purposes	VFR	61.8%	-0.5	12.6
		Business Shopping	9.1%	-0.6	-3.5
	Spend	ZAR Bn	<u>36.3</u>	<u>-3.5%</u>	<u>39.4%</u>
	Share of Spend		39.6%	0.0	7.5
	Average Spend	ZAR	5 800	-7.9%	61.1%
	Length of Stay	nights	<u>12.6</u>	<u>-1.3%</u>	<u>34.7%</u>
	Top 2 Accommodations	SFR Hotels	85.3% 3.3%	-0.4 0.1	1.7 0.0
	Geographic Spread	2 provinces or more	<u>2.3%</u>	<u>-0.2</u>	<u>-2.1</u>
	No. Provinces		1.0	-0.2%	-2.4%
	Top 2 Provinces	Gauteng Mpumalanga	41.1% 26.5%	-1.6 2.9	11.6 9.8
	Satisfaction	out of 5	<u>4.6</u>	<u>0.8%</u>	<u>3.3%</u>

AFRICA AIR ARRIVALS

299.6 K

+16.4% ▲

In 2024, Africa tourists arriving by air increased to 299.4 thousand, a +16.4% increase against 2023. The share of air arrivals from Africa remained small at 3.4%, a 0.4 pp increase year-on-year. Travellers from Africa arriving via Air are mostly between the ages of 31 - 40 years, amounting to a share of 45.9%. The primary reasons for visiting were VFR and MICE with a share of 25.3% and 19.5%, respectively. Similarly to Asian visitors, Africa Air arrivals have the highest proportion of visitors for MICE purposes. Their preferred accommodations were SFR at 38.4% and hotels at 22.3%, which aligned with their reasons for travel. Total spend by tourists arriving by air increased against 2023 by +10.8% reaching ZAR 5.6 billion, with an average spend of ZAR 23 300, a marginal drop of -4.1% against 2023. The average duration of stay remained stable against last year at 15.3 nights, with the preferred choice of accommodation being SFR (38.4%) and hotels (22.3%). The geographic spread for Africa travellers arriving via Air is low at 9.9%, with an average of 1.1 provinces being visited which is Gauteng accounting for 71.2%, more than likely due to Johannesburg being the major airport hub for Africa Air travellers. The top source countries were Kenya, Angola, Tanzania and Ghana. The higher spend and more varied reasons for travel (including business) reflect the distinct profile of air travellers, who are often more affluent and have diverse travel purposes. The dominance of Gauteng (73.2%) as a destination further highlights the importance of business and urban centres for this segment.



Africa Air Tourist Arrivals by Top Ten Markets 2024

Africa Air Top 10 Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
			2019	2023	2024		
Kenya	42 403	47 852	9.4%	16.5%	16.0%	12.9%	57.8%
Angola	39 265	37 811	19.1%	15.3%	12.6%	-3.7%	39.0%
Tanzania	34 240	37 579	11.8%	13.3%	12.5%	9.8%	-1.8%
Ghana	23 211	36 656	5.7%	9.0%	12.2%	57.9%	99.4%
DRC	18 809	28 940	10.2%	7.3%	9.7%	53.9%	-12.6%
Nigeria	17 879	22 511	12.1%	6.9%	7.5%	25.9%	42.3%
Mauritius	14 724	18 301	6.8%	5.7%	6.1%	24.3%	-16.5%
Uganda	12 874	12 788	4.6%	5.0%	4.3%	-0.7%	-13.6%
Ethiopia	6 489	7 432	2.1%	2.5%	2.5%	14.5%	10.8%
Egypt	5 859	5 956	2.6%	2.3%	2.0%	1.7%	28.3%
All Africa Air Arrivals	257 375	299 638	3.2%	3.0%	3.4%	16.4%	7.5%



AFRICA AIR

2024

Growth / PP Change
2023-2024Growth / PP Change
2019-2024

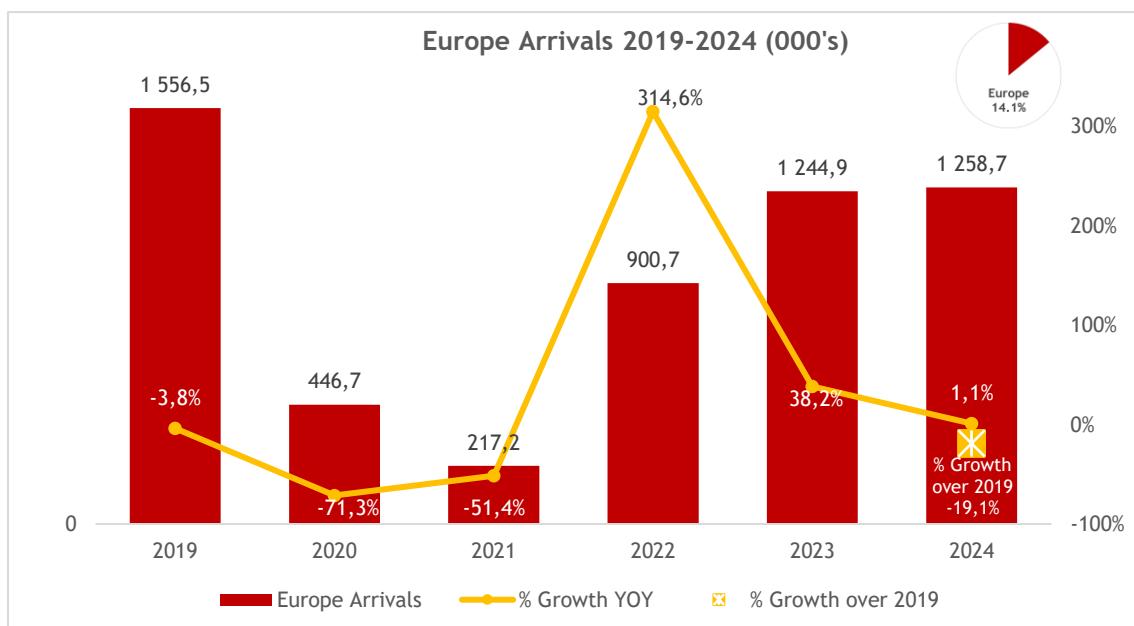
	Arrivals	Million	<u>0.3</u>	<u>16.4%</u>	<u>-7.5%</u>
	Share of Arrivals		3.4%	0.3	0.2
	Top 2 Age Groups	35-40 years	24.6%	1.6	3.6
		31-34 years	21.3%	-1.6	6.9
	Top 2 Main Purposes	VFR	25.3%	-0.6	4.2
		MICE	19.5%	-1.4	3.1
	Spend	ZAR Bn	<u>5.6</u>	<u>10.8%</u>	<u>19.6%</u>
	Share of Spend		6.2%	0.8	0.3
	Average Spend	ZAR	23 300	-4.1%	22.6%
	Length of Stay	nights	<u>15.3</u>	<u>-1.6%</u>	<u>-21.2%</u>
	Top 2 Accommodations	SFR Hotels	38.4% 22.3%	-2.7 -0.2	4.4 4.4
	Geographic Spread	2 provinces or more	<u>9.9%</u>	<u>-0.2</u>	<u>-2.6</u>
	No. Provinces		1.1	-0.4%	-3.0%
	Top 2 Provinces	Gauteng Western Cape	71.2% 21.9%	-1.9 0.4	8.1 -13.2
	Satisfaction	out of 5	<u>4.4</u>	<u>1.4%</u>	<u>0.1%</u>

EUROPE ARRIVALS

1.3 M

+1.1% ▲

This year, European tourist arrivals totalled 1.3 million, a flat performance of +1.1% increase year-on-year. Europe's recovery rate against 2019 remained the second largest at -19.1%. European tourists accounted for 14.1% of all international tourist arrivals. A quarter (25.0%) of European visitors were aged 41-50 and 18.4% were aged between 35-40 years old. European tourists, similar to American tourists, predominately visit for holiday purposes (48.5%), and secondly for VFR purposes (25.3%). The proportion of holidaymakers and those visiting VFR remained stable year-on-year. This year, total spend dropped to ZAR 28.3 billion, a -11.3% decrease vs 2023 still constituting a substantial amount of the total tourists (30.9%). The average spend per trip declined by -12.0% to ZAR 24 900. European visitors showed a high geographic spread of 33.8%, visiting an average of 1.5 provinces. Europeans' top province visited was the Western Cape (58.0%), followed by Gauteng (38.7%) whereas other regions' top province visited is normally Gauteng. The average number of nights stayed dropped by -6.4% against 2023 to an average of 14.9 nights, these nights were mostly stayed with SFR at 32.3% and hotels at 24.0%. The top source countries for the European region were the UK and Germany with a share of 27.8% and 20.3%, respectively. The number of UK arrivals dropped marginally against 2023 whereas an increase of +4.0% in arrivals from Germany was noted. The UK and Germany make up 48.1% of arrivals from Europe. The high proportion of older age groups and holiday-focused visits suggests that retirees and leisure travellers are key segments. The reliance on hotels indicates a preference for comfort and convenience, aligning with the European market's economic resilience and cultural affinity for leisure travel.



Europe Tourist Arrivals by Top Five Markets 2024

Europe Top 5 Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
UK	356 160	349 883	28.0%	28.6%	27.8%	-1.8%	-19.9%
Germany	245 259	254 992	20.7%	19.7%	20.3%	4.0%	-21.0%
The Netherlands	131 371	132 422	9.3%	10.6%	10.5%	0.8%	-8.1%
France	119 974	125 823	10.6%	9.6%	10.0%	4.9%	-23.8%
Italy	52 091	50 780	4.2%	4.2%	4.0%	-2.5%	-21.6%
All Europe Arrivals	1 244 877	1 258 706	15.2%	14.7%	14.1%	1.1%	-19.1%



EUROPE

2024

Growth / PP Change
2023-2024

Growth / PP Change
2019-2024

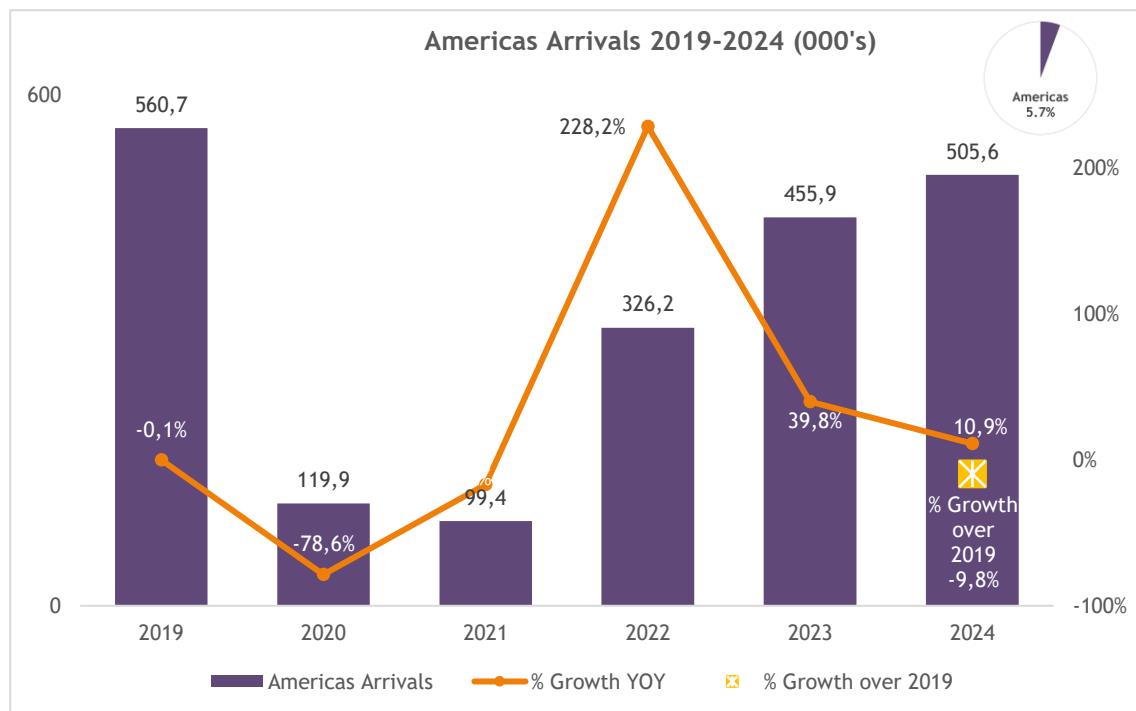
	Arrivals	Million	1.3	1.1%	-19.1%
	Share of Arrivals		14.1%	-0.6	-1.1
	Top 2 Age Groups	41-50 years	25.0%	3.4	9.7
		35-40 years	18.4%	2.2	7.4
	Top 2 Main Purposes	Holiday	48.5%	-4.5	-11.7
		VFR	25.3%	2.3	7.1
	Spend	ZAR Bn	28.3	-11.3%	-9.9%
	Share of Spend		30.9%	-2.8	-7.8
	Average Spend	ZAR	24 900	-12.0%	8.7%
	Length of Stay	nights	14.9	-6.4%	-12.8%
	Top 2 Accommodations	SFR	32.3%	0.4	9.2
		Hotels	24.0%	0.9	-1.8
	Geographic Spread	2 provinces or more	33.8%	-0.5	-7.8
	No. Provinces		1.5	-0.7%	-9.9%
	Top 2 Provinces	Western Cape	58.0%	-0.5	-14.8
		Gauteng	38.7%	2.0	6.9
	Satisfaction	out of 5	4.5	-0.3%	-2.6%

AMERICAS ARRIVALS

505.6 K

+10.9% ▲

Arrivals from the Americas reached 505.6K, an increase of +10.9% compared to 2023. Tourists from the Americas were slightly younger this year, with 22.4% between 41-50 years, and 16.3% between the ages of 35-40 years. American travellers to South Africa are unique in that their predominant purpose for travel is for holidays, (52.3%, a +1.4% increase year-on-year), the highest across all regions. They had the highest average spend across all regions, at ZAR 30 100, a marginal drop of -4.5% against 2023 yet still a phenomenal +38.7% increase from 2019. The total spend reached an astounding ZAR 14.0 billion, signifying a further +14.3% rise over 2023. American tourists' spending constituted 15.3% of the total tourist spend and they also boasted the highest Spend to Arrivals ratio. Americans stayed with SFR (39.4%) or in hotels (24.3%). They visited Gauteng and the Western Cape almost equally (50.7% & 48.0%), resulting in the second highest geographic spread at 36.9%. On average, they visited 1.6 provinces, an increase of +1.8% from 2023. In 2024, visitors were predominately from the USA (73.7% vs 77.6% in 2023). Arrivals from Canada increased by +5.5% year on year, resulting in a share of 11.5%. Brazil performed particularly well in 2024, increasing its arrivals year-on-year by +94.2%. This year, tourism from Americas grew in share to 5.7% with high spending and older age groups highlighting affluent, seasoned travellers from the Americas.



Americas Tourist Arrivals by Top Five Markets 2024

Americas Top 5 Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
USA	353 975	372 362	66.7%	77.6%	73.7%	-5.2%	-0.4%
Canada	55 056	58 057	11.9%	12.1%	11.5%	-5.5%	-2.8%
Brazil	25 672	49 855	13.8%	5.6%	9.9%	+94.2%	+5.5%
Argentina	3 805	5 422	2.8%	0.8%	1.1%	+42.5%	-5.1%
Mexico	4 511	4 819	0.9%	1.0%	1.0%	+6.8%	-3.8%
All Americas Arrivals	455 901	505 579	5.5%	5.4%	5.7%	+10.9%	-9.8%



AMERICAS

2024

Growth / PP Change
2023-2024Growth / PP Change
2019-2024

	Arrivals	Million	0.5	10.9%	-9.8%
	Share of Arrivals		5.7%	0.3	0.2
	Top 2 Age Groups	41-50 years	22.4%	2.0	9.9
		35-40 years	16.3%	-0.5	3.8
	Top 2 Main Purposes	Holiday	52.3%	-4.1	-5.5
		VFR	22.4%	1.4	7.7
	Spend	ZAR Bn	14.0	14.3%	32.2%
	Share of Spend		15.3%	2.4	2.2
	Average Spend	ZAR	30 100	-4.7%	38.7%
	Length of Stay	nights	15.4	-1.3%	-5.9%
	Top 2 Accommodations	SFR	39.4%	-1.9	-1.9
		Hotels	24.2%	1.3	1.3
	Geographic Spread	2 provinces or more	36.9%	0.8	-9.1
	No. Provinces		1.6	1.8%	-8.1%
	Top 2 Provinces	Gauteng	50.7%	0.7	6.1
		Western Cape	48.0%	2.2	-18.5
	Satisfaction	out of 5	4.6	0.0%	-3.4%

ASIA ARRIVALS

207.7 K

+4.2% ▲

In 2024, Asian travel increased marginally (+4.2% increase against 2023) to 207.7 thousand arrivals. Despite steady growth year-on-year since 2021, Asia travel has the most pronounced recovery gap to 2019 registering a -33.3% shortfall. Asia travel accounts for a small portion of tourism to South Africa with an overall share of 2.3%. Asian travellers were quite evenly spread out across the age categories 25 - 30 years (20.0%), 31 - 34 years (21.1%), 35 - 40 years (21.5%) and 41 - 50 years (20.3%), all with marginal shifts year-on-year. The patterns of travel from Asia differed notably from other overseas markets, in that almost equal to VFR and holiday purposes, travelling for Business and MICE, accounted for a combined share of 42.9% - this year Business travel ranked as the second highest purpose as opposed to holidays. Year-on-year, spending by Asian tourists dropped further by -9.2%, totalling ZAR 3.7 billion with an average spend of ZAR 21 300, a drop of -13.4%. The average duration of stay for Asian tourists was 16.7 nights, reflecting a steep decline of -17.4% against 2023. Most Asian travellers stayed with friends and family (42.9%) and just over a quarter stayed in hotels (25.8%), closely aligned with business travel noted this year. The majority of Asian travellers visited Gauteng (56.8%) and the Western Cape (34.5%), achieving a moderate geographic spread of 22.2%. India and China (including Hong Kong) were the predominant source countries, with India accounting for 36.4% of arrivals, a marginal drop of -3.6 pp against 2023 and China (including Hong Kong), accounting for 20.1% of tourists, an increase of +1.4 pp against 2023. A widespread across the age groups and balanced accommodation choices reflect Asia's mix of business, holiday, and family-related travel.



Asia Tourist Arrivals by Top Five Markets 2024

Asia Top 10 Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
India	79 774	75 541	30.7%	40.0%	36.4%	-5.3%	-21.0%
China Including Hong Kong	37 334	41 651	30.0%	18.7%	20.1%	11.6%	-55.4%
Japan	13 176	17 370	9.1%	6.6%	8.4%	31.8%	-38.8%
Pakistan	12 718	13 557	4.4%	6.4%	6.5%	6.6%	-1.4%
South Korea	10 436	12 811	6.4%	5.2%	6.2%	22.8%	-35.6%
All Asia Arrivals	199 308	207 718	3.0%	2.3%	2.3%	4.2%	-33.1%



ASIA

2024

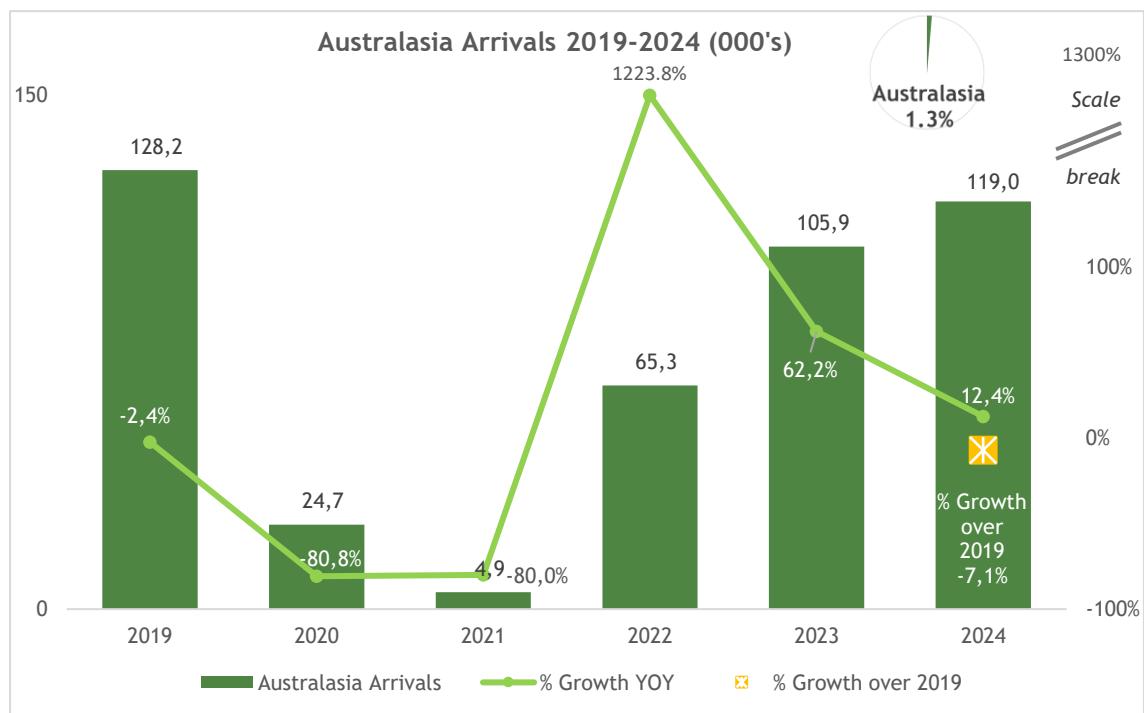
Growth / PP Change
2023-2024

Growth / PP Change
2019-2024

	Arrivals	Million	<u>0.2</u>	<u>4.2%</u>	<u>-33.3%</u>
					<u>-0.7</u>
	Share of Arrivals		2.3%	0.0	-0.7
	Top 2 Age Groups	35-40 years	21.5%	-0.3	3.8
		31-34 years	21.1%	-0.2	7.6
	Top 2 Main Purposes	VFR	28.0%	0.7	6.1
		Business Traveller	22.3%	1.7	7.6
	Spend	ZAR Bn	<u>3.7</u>	<u>-9.2%</u>	<u>-21.9%</u>
	Share of Spend		4.0%	-0.3	-1.8
	Average Spend	ZAR	21 400	-13.4%	21.7%
	Length of Stay	nights	<u>16.7</u>	<u>-17.4%</u>	<u>-22.1%</u>
	Top 2 Accommodations	SFR	42.9%	-1.0	11.1
		Hotels	25.8%	4.9	0.4
	Geographic Spread	2 provinces or more	<u>22.2%</u>	<u>-3.4</u>	<u>-10.1</u>
	No. Provinces		1.3	-2.7%	-10.5%
	Top 2 Provinces	Gauteng	56.8%	1.3	8.5
		Western Cape	34.5%	0.3	-24.7
	Satisfaction	out of 5	<u>4.4</u>	<u>0.4%</u>	<u>-1.0%</u>

AUSTRALASIA ARRIVALS **119.0 K** +12.4% ▲

In 2024, the number of visitors from Australasia kept going from strength to strength with a 2023 increase of +12.4% against 2023 and reached 119.0 thousand. Despite these gains, the volume of Australasian visitors remained small, accounting for a small portion of total arrivals at 1.3%, a 0.1pp increase against 2023. The majority of Australasian visitors were aged between 41-50 (24.1%) and 60+ years (15.0%), relatively consistent with 2023. In line with 2023, Australasia led the overseas regions in visiting family and relatives (VFR), with 51.2% and holidaymakers accounting for 35.3%. The total foreign spend by Australasian arrivals remained flat against 2023 at ZAR 2.6 billion, while the average spend per visitor was ZAR 23 500, a drop of -8.6% against 2023. The length of stay remained in line with 2023 at an average of 16.5 nights. Lodging with friends and relatives represented 60.2% of all accommodation, which correlated with the notably high VFR percentage (51.2%). Hotels constituted a further 15.6% of accommodation choices. Australasians noted the highest geographic spread at 40.8%, predominantly travelling to Gauteng (52.9%) and the Western Cape (46.7%), the Western Cape increased by +5.1 pp against 2023. On average, Australians visited 1.6 provinces. The primary source country for visitors continued to be Australia, accounting for 82.8% of visitors, a +14.3% growth against 2023. The strong VFR trend indicates enduring family connections, while extended stays could be reflective of the long-haul flights between South Africa and Australia. The geographic spread could reflect Australasians' exploratory travel behaviour, driven by cultural curiosity and leisure.



Australasia Tourist Arrivals by Top Two Markets 2023

Australasia Top 2 Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
Australia	86 250	98 544	87.0%	81.5%	82.8%	14.3%	-11.6%
New Zealand	19 349	20 138	12.8%	18.3%	16.9%	4.1%	+2.7%
All Australasia Arrivals	105 888	119 036	1.3%	1.2%	1.3%	12.4%	-7.1%



AUSTRALASIA

2024

Growth / PP Change
2023-2024

Growth / PP Change
2019-2024

	Arrivals	Million	0.1	12.4%	-7.1%
	Share of Arrivals		1.3%	0.1	0.1
	Top 2 Age Groups	41-50 years	24.1%	2.8	7.2
		60+ years	15.0%	-1.1	0.4
	Top 2 Main Purposes	VFR	51.2%	-1.8	14.3
		VFR	35.3%	2.7	-12.0
	Spend	ZAR Bn	2.6	1.0%	7.0%
	Share of Spend		2.8%	0.1	-0.2
	Average Spend	ZAR	23 600	-8.6%	15.8%
	Length of Stay	nights	16.5	-2.4%	11.8%
	Top 2 Accommodations	SFR Hotels	60.2% 15.6%	-1.5 0.8	16.0 -7.2
	Geographic Spread	2 provinces or more	40.8%	0.1	2.6
	No. Provinces		1.6	0.2%	1.0%
	Top 2 Provinces	Gauteng Western Cape	52.9% 46.7%	-3.1 5.1	16.7 -15.4
	Satisfaction	out of 5	4.5	1.8%	-0.9%

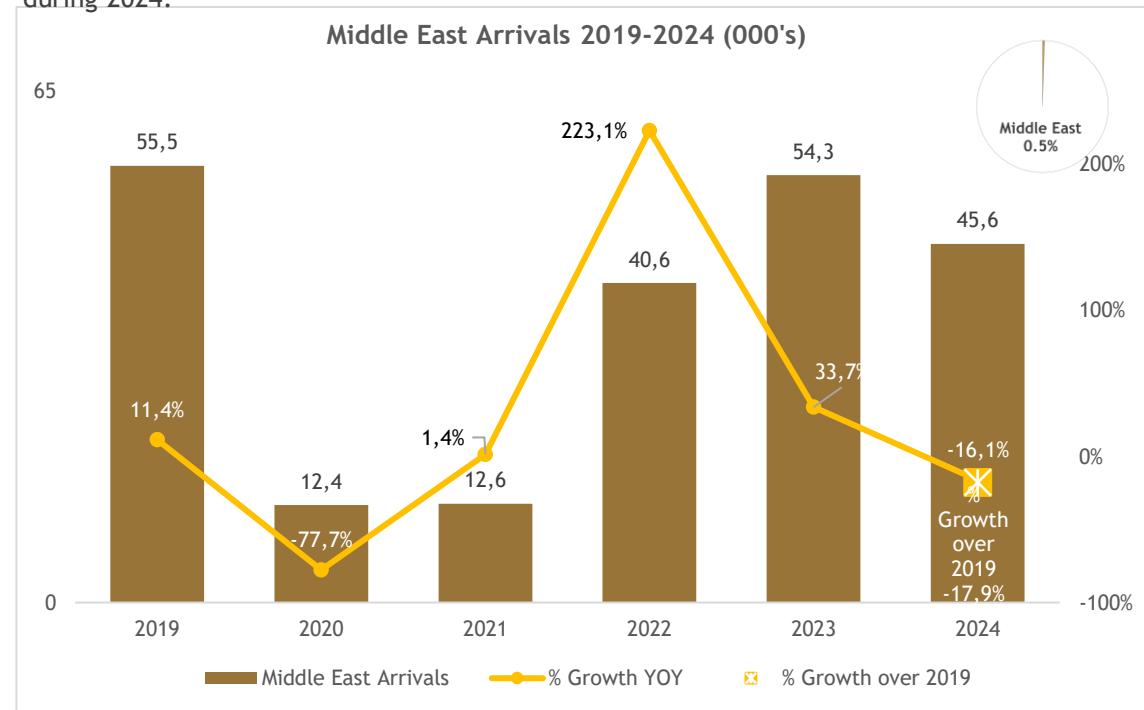
MIDDLE EAST ARRIVALS

45.6 K

-16.1% ▼

Middle Eastern arrivals dropped sharply in 2024 to 45.6 K, a -17.9% decline. The Middle East continued to represent the smallest share of arrivals at 0.5%, a 0.1 pp drop against 2023. This year most arrivals from the Middle East were slightly older aged between 31-34 years old and 35-40 years (24.4% and 18.6%, respectively). In 2024, the majority travelled to visit friends and relatives (54.1% share, an increase of +10.4 pp year-on-year and +27.8 pp against 2019). Holidaymakers accounted for the second main reason with a share of 24.9% in 2024, however, this dropped sharply both year-on-year and against 2019. Their total spend remained flat at ZAR 1.1 billion, with an average spend of ZAR 28 600 per tourist, a slight uptick of +4.0% against 2023. Middle Eastern visitors stayed an average of 18.5 nights, despite the decrease of -18.9% against 2023, it remained the region with the longest duration. In line with the purpose of travel, the majority stayed with friends and relatives (66.1%), a 14.1 pp increase against 2023. The geographic spread for Middle Easterners was low at 17.4%, with an average visit to 1.2 provinces, mainly Gauteng (51.5%) and the Western Cape (38.7%). This year, the primary source country was Saudi Arabia, contributing a share of 40.2%, a +12.1% increase against 2023 and a +67.7% increase against 2019. Israel and the UAE accounted for 16.2% and 14.7% of arrivals, respectively. Israel noted sharp declines against both 2023 and 2019. The extended stays, purpose of travel and accommodation type point to a visitor's focus on family and leisure. The declines noted in arrivals reflect the ongoing political and economic challenges limiting outbound travel during 2024.

Middle East Arrivals 2019-2024 (000's)



Middle East Tourist Arrivals by Top Five Markets 2024

Middle East Top 5 Markets 2024	Tourist Arrivals 2023	Tourist Arrivals 2024	% Share 2019	% Share 2023	% Share 2024	% Growth 2023 - 2024	% Growth 2019-2024
Saudi Arabia	16 351	18 333	19.7%	30.1%	40.2%	+12.1%	+67.7%
Israel	19 942	7 402	52.0%	36.7%	16.2%	-62.9%	-74.4%
United Arab Emirates	6 511	6 717	5.5%	12.0%	14.7%	+3.2%	+18.3%
Iran	2 488	2 833	3.6%	4.6%	6.2%	+13.9%	+3.5%
Jordan	2 190	2 354	4.4%	4.0%	5.2%	+7.5%	+4.4%
All Middle East Arrivals	54 339	45 602	0.5%	0.6%	0.5%	-16.1%	-17.9%



MIDDLE EAST

2024

Growth / PP Change
2023-2024

Growth / PP Change
2019-2024

	Arrivals	Thousand	45.6	-16.1%	-17.9%
	Share of Arrivals		0.5%	-0.1	0.0
	Top 2 Age Groups	31-34 years	24.4%	8.9	13.1
		35-40 years	18.6%	-3.3	7.0
	Top 2 Main Purposes	VFR	54.1%	10.4	27.8
		Holiday	24.9%	-10.1	-30.5
	Spend	ZAR Bn	1.1	-16.7%	-13.6%
	Share of Spend		1.2%	-0.2	-0.4
	Average Spend	ZAR	28 700	4.0%	6.3%
	Length of Stay	nights	18.5	-18.9%	11.2%
	Top 2 Accommodations	SFR	66.1%	14.1	29.4
		Hotels	13.4%	-3.3	-15.1
	Geographic Spread	2 provinces or more	17.4%	-11.1	-22.0
	No. Provinces		1.2	-13.3%	-23.8%
	Top 2 Provinces	Gauteng	51.5%	-3.5	8.1
		Western Cape	38.7%	-5.7	-30.1
	Satisfaction	out of 5	4.4	1.8%	-1.9%



Inspiring new ways

INTERNATIONAL TOURISM: PROVINCIAL PERFORMANCE



PROVINCIAL ARRIVALS



8.9 MILLION

+5.1% 



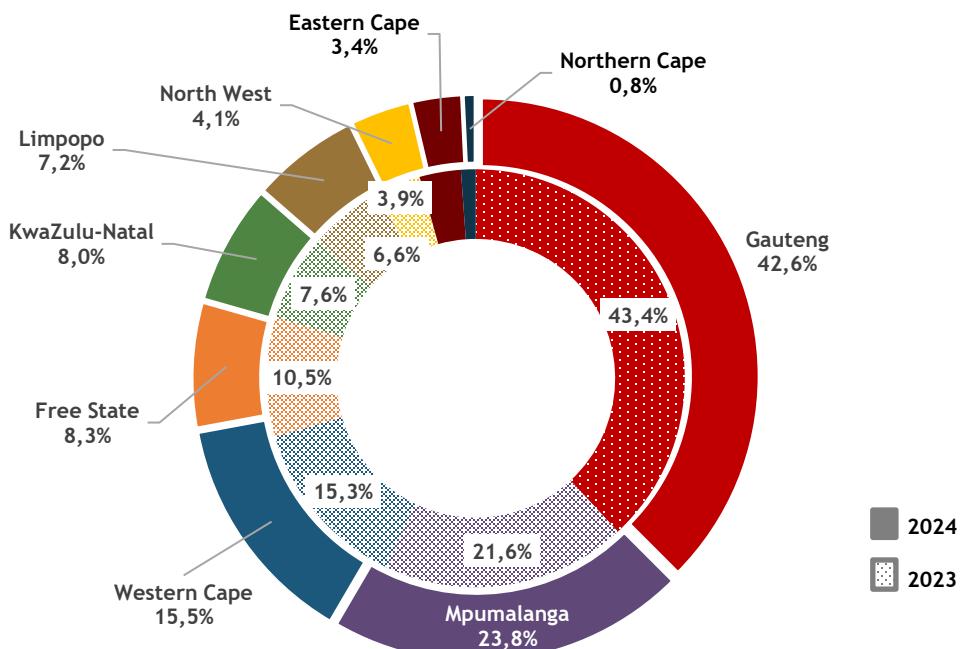
Provincial Overview of Tourist Arrivals 2024

(Spend, Bed Nights & Length of Stay)

Province	International Tourist Arrivals (Millions)	Foreign Spend (ZAR Billions)	Bednights (Millions)	Length of Stay (Nights)
Gauteng	3.8	41.3	48.2	13.1
Mpumalanga	2.1	7.2	20.9	10.2
Western Cape	1.4	22.7	17.0	12.7
Free State	0.7	1.6	9.1	12.7
KwaZulu-Natal	0.7	5.5	7.0	10.2
Limpopo	0.6	5.7	4.2	6.8
North West	0.4	2.0	3.7	10.9
Eastern Cape	0.3	4.2	3.7	13.1
Northern Cape	0.1	1.4	0.7	10.0

Multiple provinces may be visited.
Sum over 100%.

Share of International visitors by Province 2024 vs 2023



PROVINCIAL ARRIVALS



8.9 MILLION

+5.1%



Provincial Overview of Tourist Arrivals 2024 - Share

(Share of Total International Arrivals 2024)

Province	International Tourist Arrivals (Share)	Foreign Spend (Share)	Ratio % Spend / % Arrivals
Gauteng	42.6%	45.1%	105.8%
Mpumalanga	23.8%	7.8%	32.9%
Western Cape	15.5%	24.8%	159.5%
Free State	8.3%	1.7%	20.3%
KwaZulu-Natal	8.0%	6.0%	75.9%
Limpopo	7.2%	6.3%	87.0%
North West	4.1%	2.2%	54.9%
Eastern Cape	3.4%	4.6%	135.9%
Northern Cape	0.8%	1.5%	179.7%

Note: Multiple provinces may be visited. Sum over 100%.

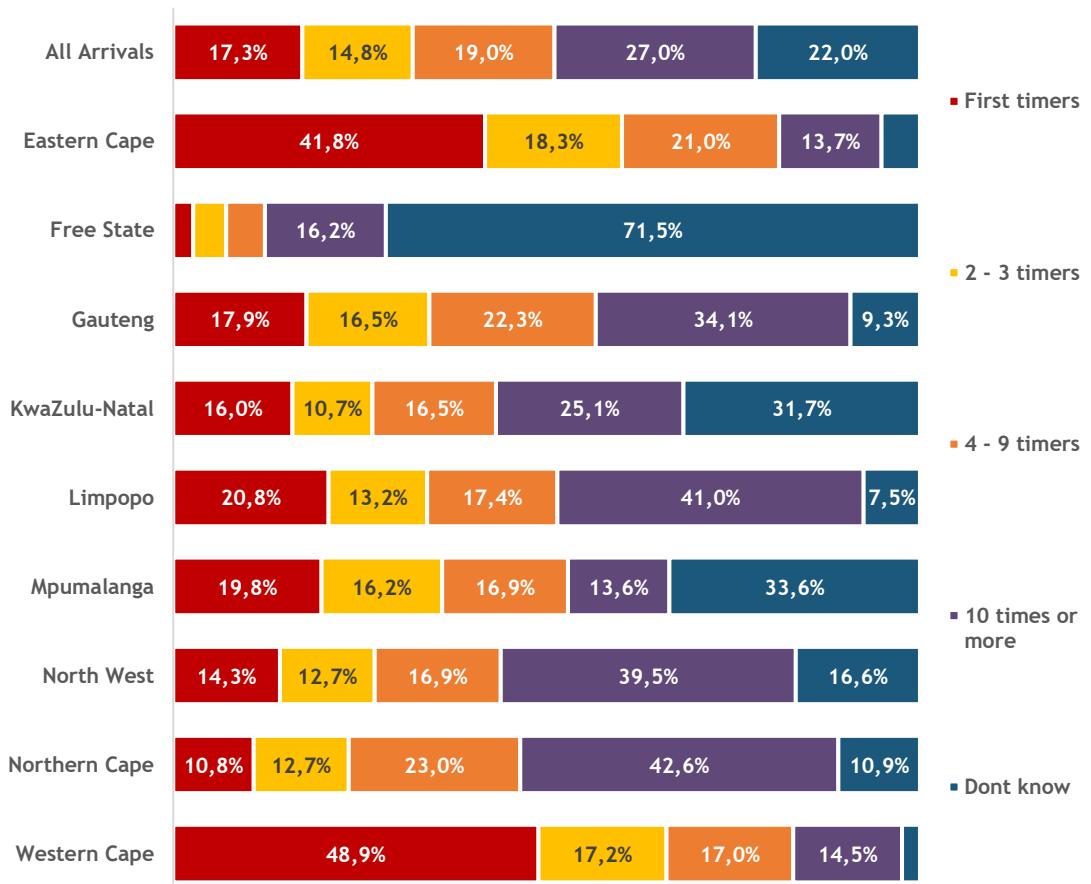


The provinces' distinct tourism characteristics are evident when evaluating repeat rates in comparison with the tourists' region of origin. In 2024, while the Western and Eastern Cape attract predominantly international holidaymakers, with their share of first-timers being the highest (48.9% and 41.8% respectively), most other provinces attract tourists primarily for VFR (Visiting Friends and Relatives) or business-related reasons. The Northern Cape, Limpopo, North West and Gauteng, and boast the highest number of repeat visitors (more than 4 times).

Compound Repeat Rate by Province 2024

2024	All Arrivals	Eastern Cape	Free State	Gauteng	Kwazulu-Natal	Limpopo	Mpumalanga	North West	Northern Cape	Western Cape
1-3 times	32.1%	60.1%	7.1%	34.3%	26.7%	34.0%	36.0%	27.0%	23.5%	66.1%
>= 4 times	46.0%	34.8%	21.4%	56.4%	41.7%	58.5%	30.4%	56.4%	65.6%	31.5%
Don't Know	22.0%	5.1%	71.5%	9.3%	31.7%	7.5%	33.6%	16.6%	10.9%	2.4%

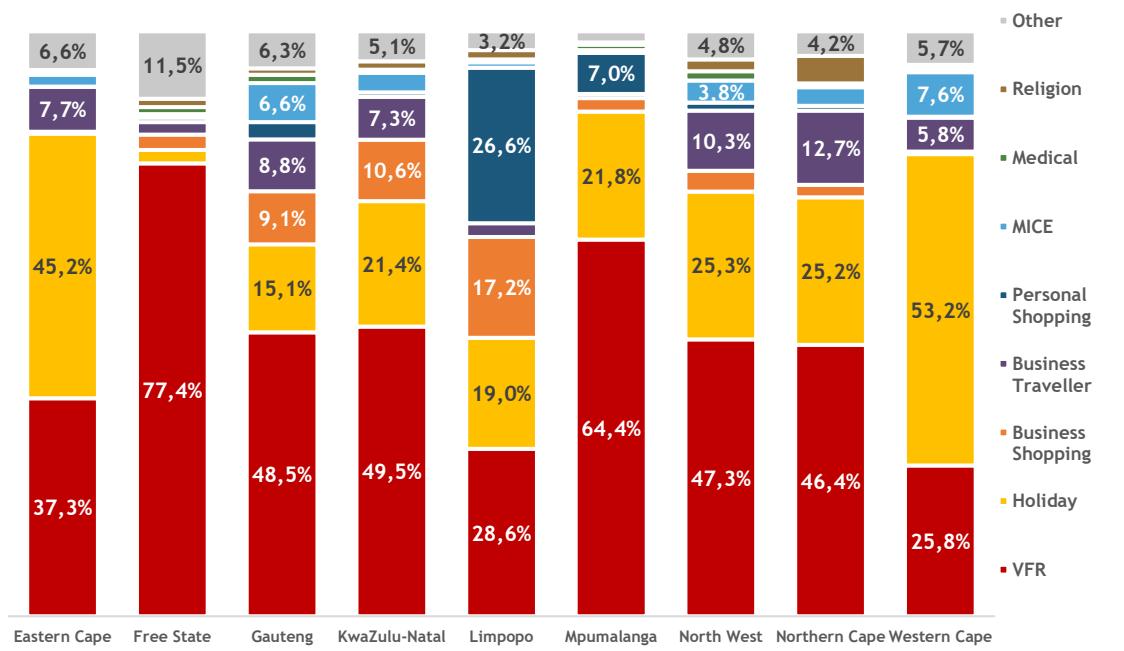
International Visitors' Repeat Rate by Province 2024



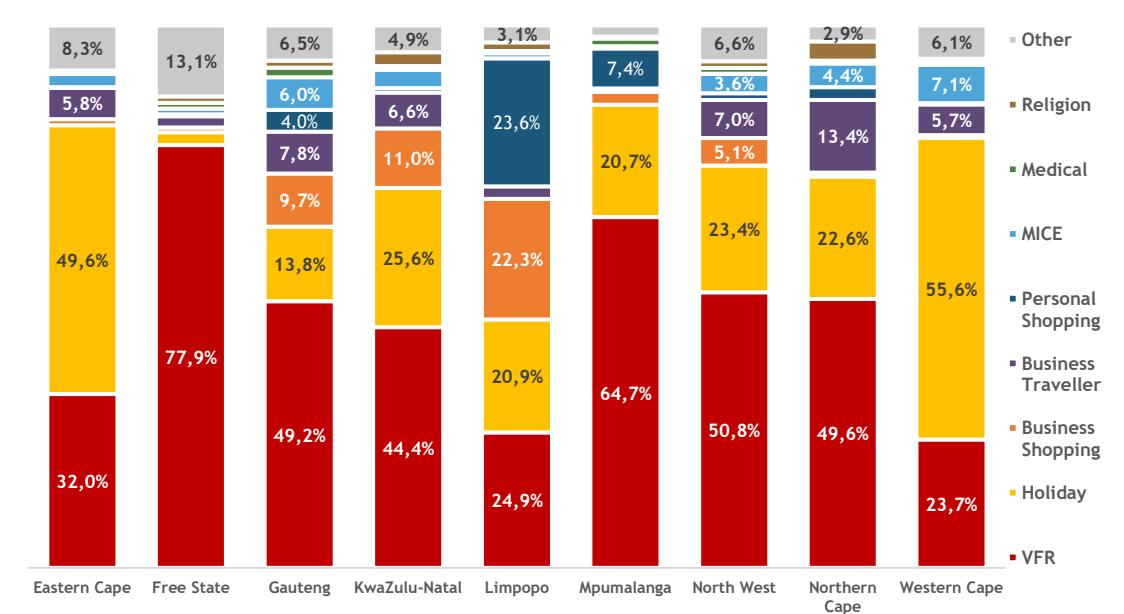


Year-on-year, the travel purposes by province brings are consistent across province with little change. The Western and Eastern Cape have similar profiles in the purpose of travel, with majority travelling for holiday purposes, followed by VFR. While the Free State and Mpumalanga are mostly VFR locations with an overwhelming proportion of 77.4%, 64.4%, respectively). North West, Northern Cape, and KwaZulu-Natal are more varied, with VFR, holiday, and business shopping all playing a key role. The Limpopo province is unique in that a large proportion of visits are for personal shopping, which correlates with its proximity to Zimbabwe, Mozambique and Botswana.

Main Purpose by Province 2024



Main Purpose by Province 2023





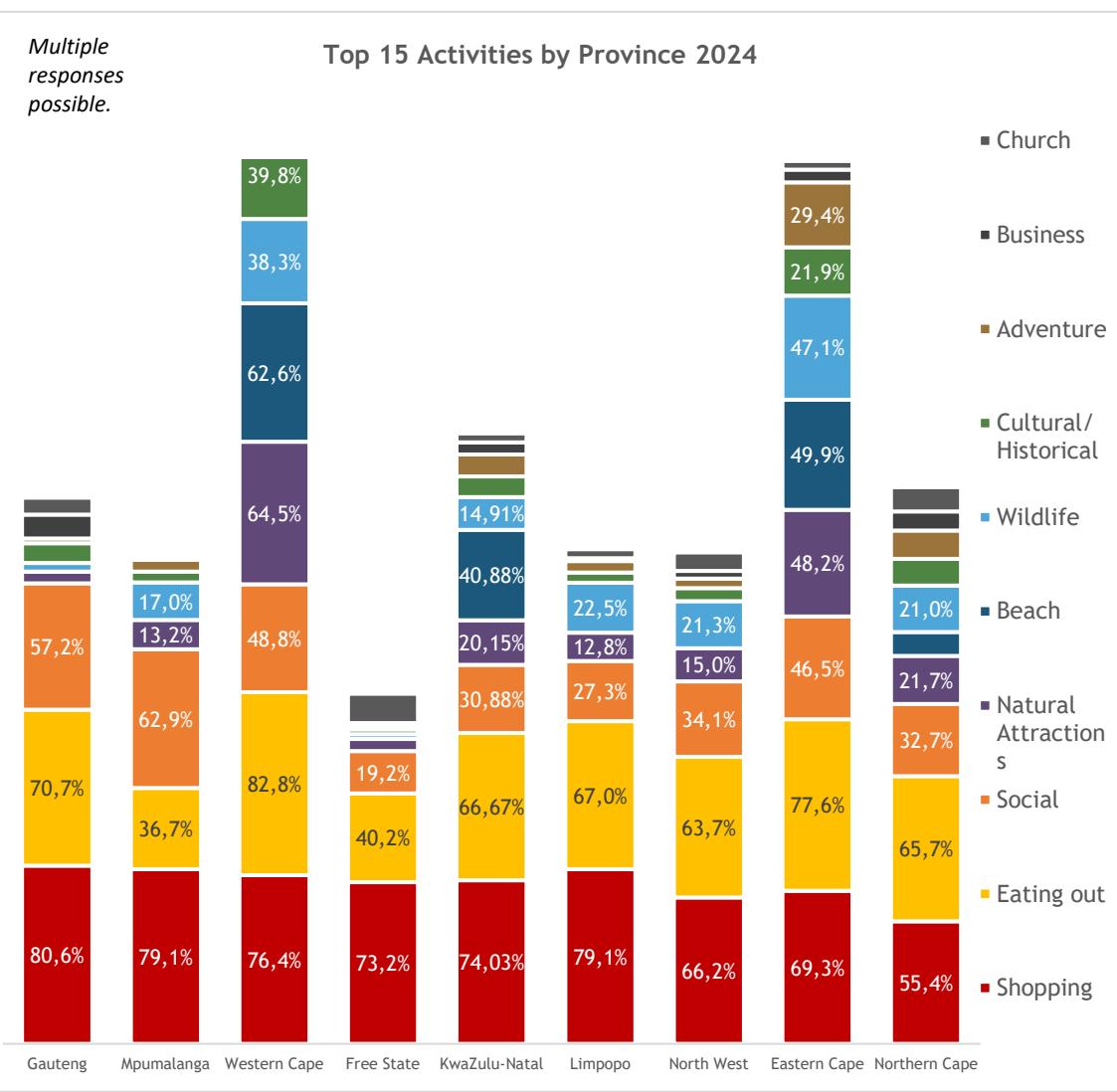
In 2024, the Western Cape and Eastern Cape have similar types of activities distribution, apart from the shopping eating out and social activities which always account for the majority of responses, these provinces attract visitors for their natural attraction, beaches, wildlife and Cultural/Historical sites. The Eastern Cape is unique in that almost a third of responses are for Adventure, which has activities from bungee jumping off the Bloukrans River Bridge (the highest in the world) to deep sea fishing.

During 2024, shopping, eating out and social form majority of the activity for Mpumalanga, Limpopo and the North West province but the standout activities for these two provinces are wildlife accounting for almost a quarter of responses.

The KwaZulu-Natal province has a slightly different distribution in the spread of activities, shopping and eating out are the most mentioned as per other provinces, then social and the beach is a key attraction with a low mention for natural attractions compared to provinces such as the Western Cape and Eastern Cape. Gauteng's responses are dominated by shopping, eating out and social activities.

Multiple responses possible.

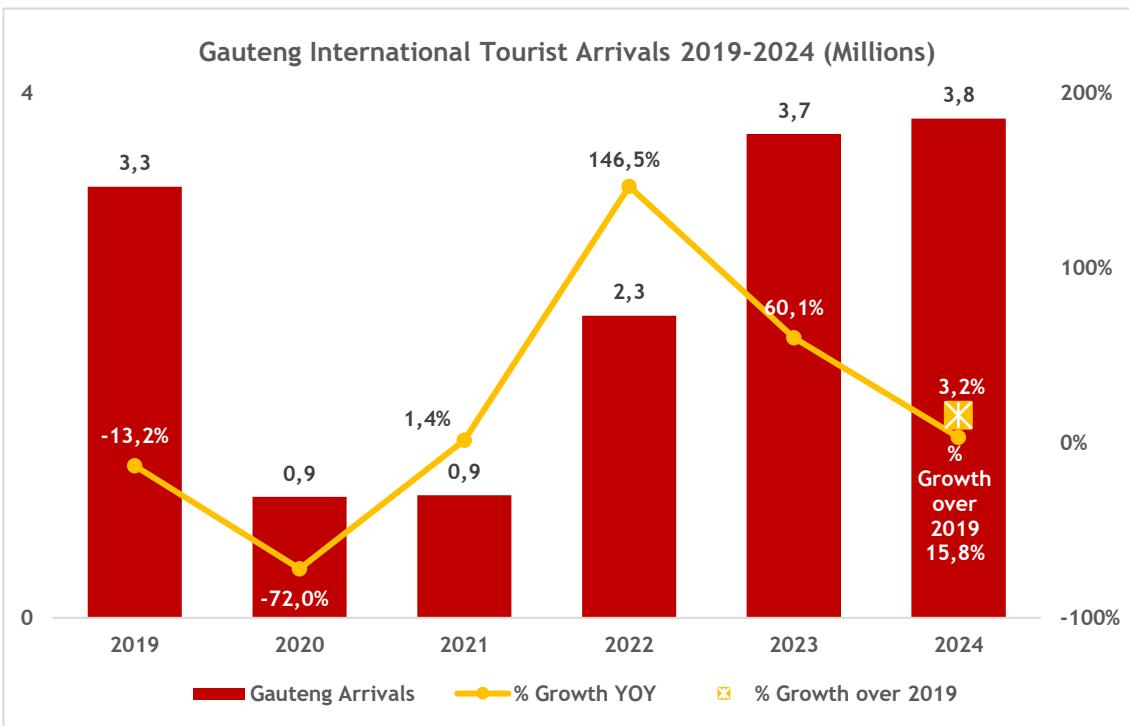
Top 15 Activities by Province 2024





- In 2024, Gauteng continued as the largest province both in terms of arrivals and spend, accounting for 42.6% of arrivals and 45.1% of spend, producing a high spend/arrival ratio of 105.8.
- This year, Gauteng recorded the highest number of international tourist arrivals in the past 6 years totaling 3.8 million, a +3.2% increase compared to 2023, and +15.8% against 2019.
- Gauteng's main source of arrivals are from Africa Land, with the top countries being Zimbabwe accounting for a 41.0% share. Overseas source markets are predominately the USA and UK. Gauteng tourists' main purpose are VFR (48.5%) and Holiday (15.1%).
- Top attractions registered in Gauteng, this year, were the Sandton City/Mandela Square, Mall of Africa, Apartheid Museum and Madela House. With the main activities being shopping, eating out and social activities.

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
Gauteng Total	3.8	41.3	
Share	42.6%	45.1%	105.8

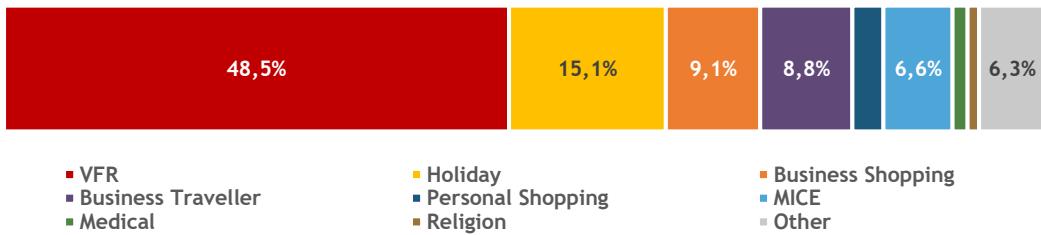


Gauteng Top 10 Source Markets 2024

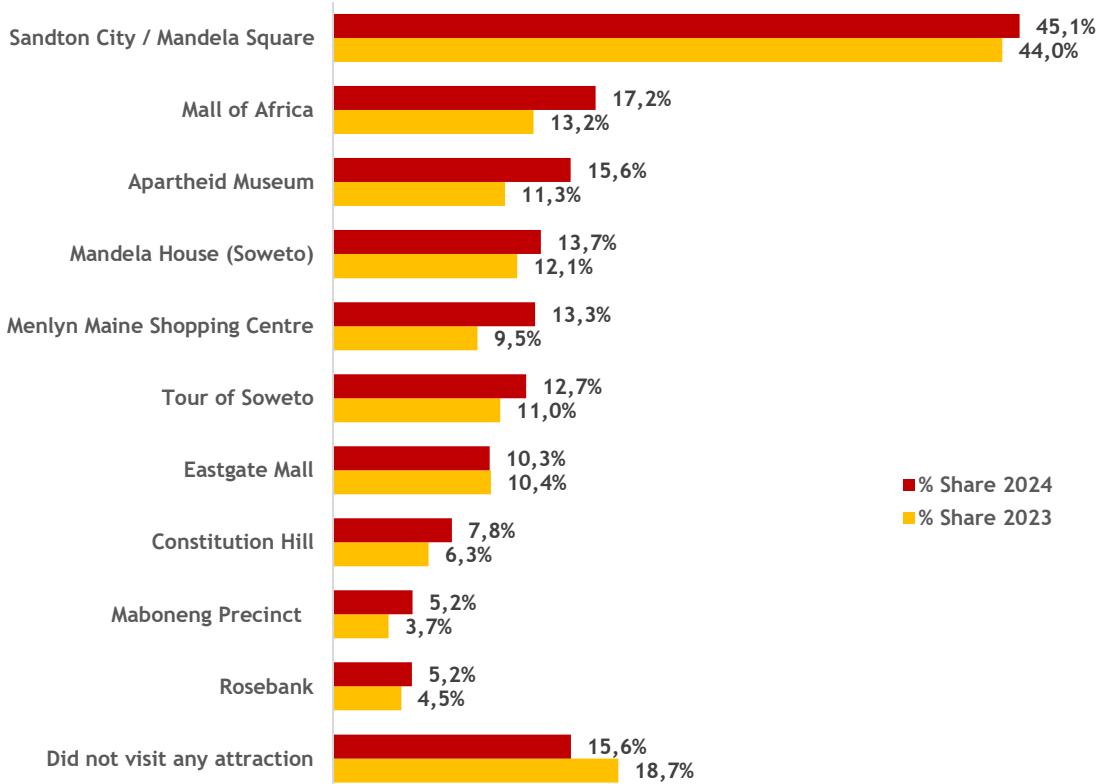
	Zimbabwe	Mozambique	Lesotho	eSwatini	Botswana
Arrivals	1 561 317	272 187	216 557	200 731	184 634
% Share 2024	41.0%	7.2%	5.7%	5.3%	4.9%
% Growth 2023-2024	-2.5%	8.1%	-6.7%	16.4%	7.1%
	USA	Malawi	UK	Zambia	Germany
Arrivals	179 549	146 045	134 420	114 483	86 587
% Share 2024	4.7%	3.8%	3.5%	3.0%	2.3%
% Growth 2023-2024	13.2%	20.6%	4.2%	-4.0%	4.5%

GAUTENG**3.8 MILLION**

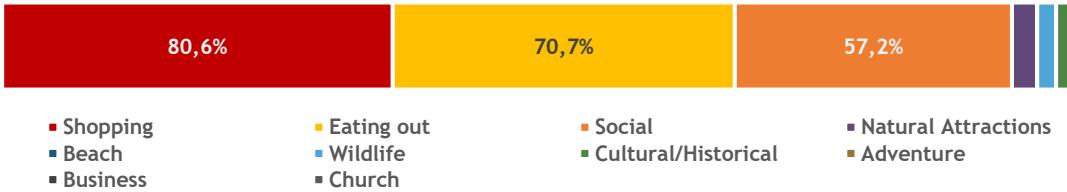
+3.2%

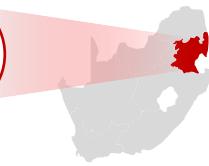
**Share of Gauteng Tourist Arrivals by Main Purpose 2024**

*Multiple responses possible.
Sum over 100%.*

Gauteng International Tourist Top 10 Attractions (2024 vs 2023)

*Multiple responses possible.
Sum over 100%.*

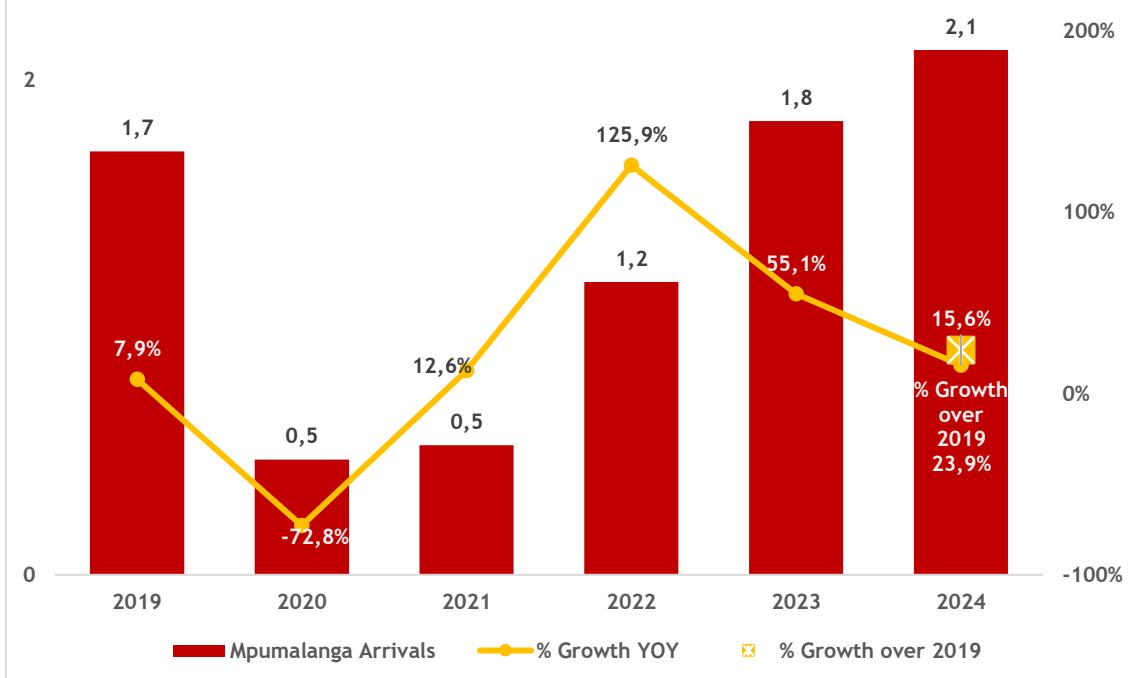
Gauteng Top 15 Activities by Province 2024



- Mpumalanga is the second largest Province in terms of International tourist arrivals accounting for 23.8% of arrivals, on the contrary spend only accounts for 7.8% share of the total spend, resulting in a low ratio of % Spend/% Arrivals of 32.9.
- Mpumalanga has reached a six-year record marking arrivals at 2.1 million, a +15.6% growth compared to 2023. Its largest source country is Mozambique accounting for 62.2% and eSwatini 17.3%. Of the top 10 source countries, seven of them are overseas visitors.
- The top attractions in Mpumalanga, were our natural attractions with Kruger Park and Blyde River Canyon God's Window accounting for 85.2% and 53.2%, respectively of the responses. Mpumalanga main purpose for visits were VFR and Holidays.
- Shopping, Eating out and Social activities are the main activities, however Mpumalanga had notable mentions for Wildlife and Natural attractions.

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
Mpumalanga Total	2.1	7.2	
Share	23.8%	7.8%	32.9

Mpumalanga International Tourist Arrivals 2019-2024 (Millions)

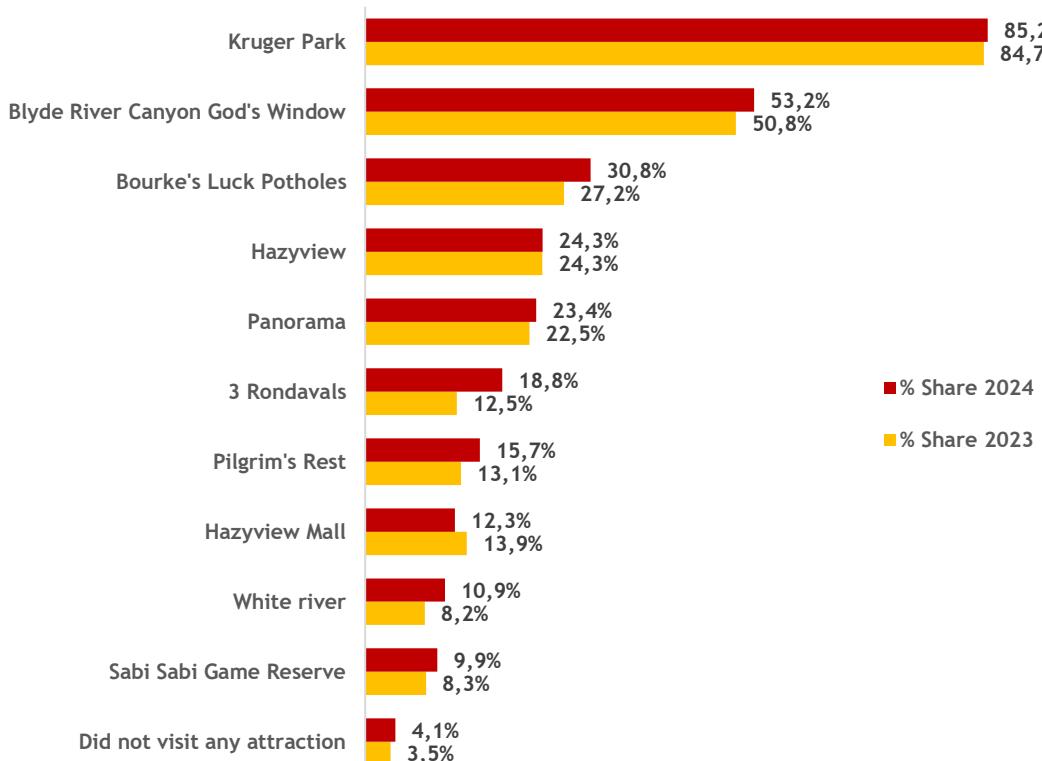


Mpumalanga Top 10 Source Markets 2024

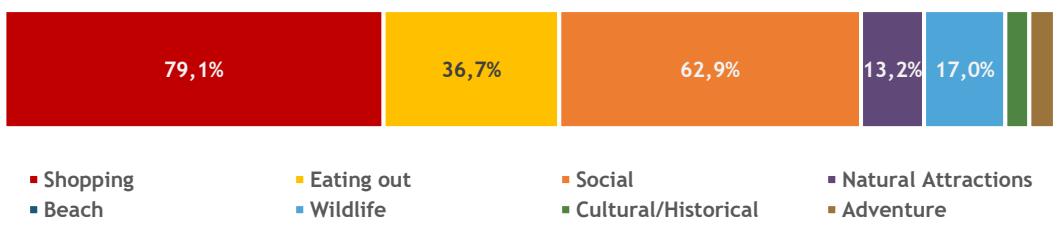
	Mozambique	eSwatini	USA	Germany	Zimbabwe
Arrivals	1 329 419	367 398	69 884	52 992	51 878
% Share 2024	62.6%	17.3%	3.3%	2.5%	2.4%
% Growth 2023-2024	20.2%	14.6%	19.0%	6.9%	-2.2%
	UK	France	The Netherlands	Australia	Italy
Arrivals	33 750	31 424	25 486	18 055	13 161
% Share 2024	1.6%	1.5%	1.2%	0.9%	0.6%
% Growth 2023-2024	-7.3%	2.4%	6.3%	28.7%	-5.7%

MPUMALANGA**2.1 MILLION**+15.6% **Share of Mpumalanga Tourist Arrivals by Main Purpose 2024**

*Multiple responses possible.
Sum over 100%.*

Mpumalanga International Tourist Top 10 Attractions (2024 vs 2023)

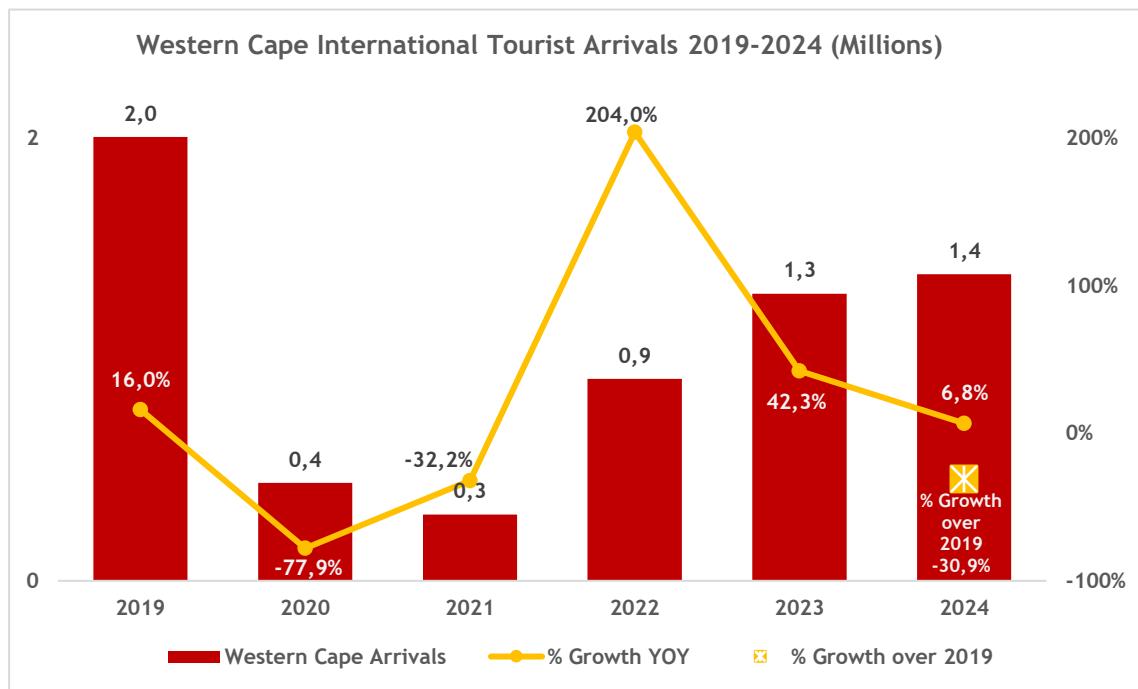
*Multiple responses possible.
Sum over 100%.*

Mpumalanga Top 15 Activities by Province 2024

WESTERN CAPE**1.4 MILLION****+6.8% ▲**

- The Western Cape accounts for 15.5% of all arrivals, and its spend accounts for 24.8% of the total spend, resulting in a strong %Spend / %Arrivals ratio of 159.5, the second largest in the country.
- Western Cape arrivals continued to fall short of 2019 by -30.9% but experienced a +6.8% increase against 2023, reaching 1.4 million tourists in 2024.
- The UK ranks first in source markets, with 13.7% of tourists, USA second, reaching 11.8% followed by Germany, accounting for 10.5% of arrivals.
- Western Cape's main reason for visitors are holidays, accounting for 53.2%, contrary to several other provinces where VFR is the main reason for travel.
- Top attraction visited was the V & A waterfront (78.3%) amongst many others all receiving equally high mentions.
- Eating out is the top chosen activity, at 82.8%, but the spectrum of activities varied, recording a large proportion of responses across all activities.

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
Western Cape Total	1.4	22.7	
Share	15.5%	24.8%	159.5

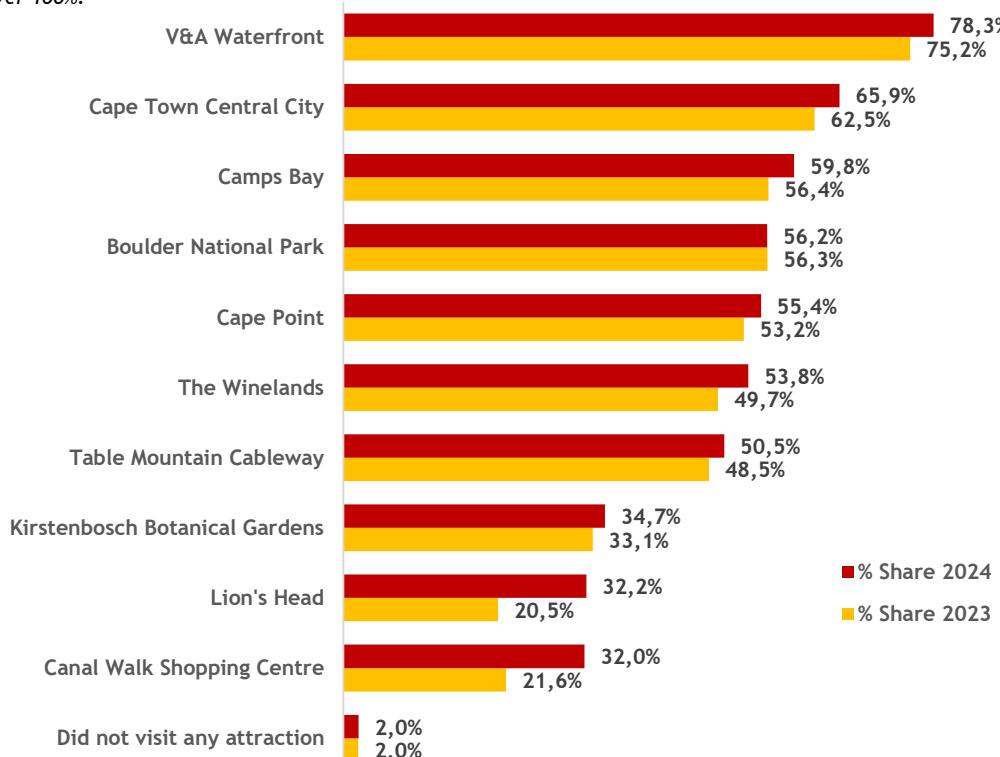


Western Cape Top 10 Source Markets 2024

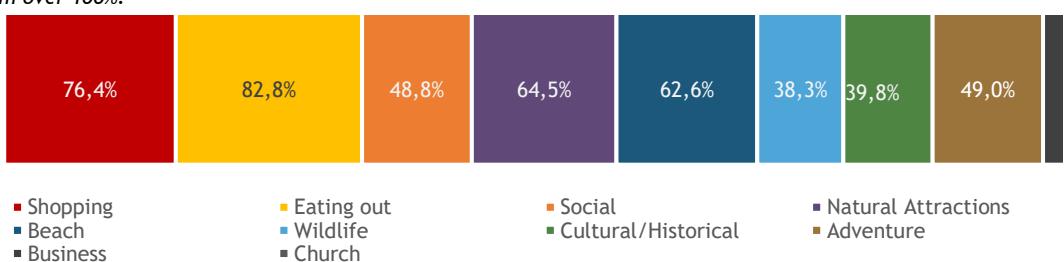
	UK	USA	Germany	Zimbabwe	Namibia
Arrivals	189 848	163 303	145 329	112 058	89 939
% Share 2024	13.7%	11.8%	10.5%	8.1%	6.5%
% Growth 2023-2024	-3.2%	16.5%	1.8%	32.7%	6.1%
	France	The Netherlands	Australia	Lesotho	Canada
Arrivals	69 715	68 716	44 693	40 266	32 575
% Share 2024	5.0%	5.0%	3.2%	2.9%	2.4%
% Growth 2023-2024	4.5%	0.6%	27.4%	-1.9%	13.7%

WESTERN CAPE**1.4 MILLION****+6.8% ▲****Share of Western Cape Tourist Arrivals by Main Purpose 2024**

*Multiple responses possible.
Sum over 100%.*

Western Cape International Tourist Top 10 Attractions (2024 vs 2023)

*Multiple responses possible.
Sum over 100%.*

Western Cape Top 15 Activities by Province 2024

FREE STATE**0.7 MILLION**

-16.8%



- Free State Province accounted for 8.3% of international tourist arrivals, ranking fourth but is the province with lowest spend accounting for only 1.7% of total spend, amounting to ZAR 1.6 Billion. This gives the Free State the lowest %Spend / %Arrivals ratio of 23.1.
- During 2024, the Free State arrivals experienced a slight drop of -16.8% against 2023, marking 0.7 millions tourist arrivals.
- Neighboring country Lesotho accounted for 88.2% of arrivals despite a decrease of -20.0% from previous year.
- Free State Arrivals purpose is mostly VFR, which represent 77.4% of all visitors with the Mimosa Mall being mentioned as the most visited attraction. Just over a quarter of tourists end up not visiting any attraction.
- Shopping, Eating Out and engaging in social activities are the primary activities for the North West.

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
Free State Total	0.7	1.6	
Share	8.3%	1.7%	20.3

**Free State Top 10 Source Markets 2024**

	Lesotho	Zimbabwe	Botswana	USA	UK
Arrivals	655 791	24 047	20 069	7 960	5 592
% Share 2024	88.2%	3.2%	2.7%	1.1%	0.8%
% Growth 2023-2024	-20.0%	39.5%	61.2%	19.1%	-10.1%
	Germany	The Netherlands	Namibia	Mozambique	Australia
Arrivals	3 008	2 753	2 723	2 383	2 036
% Share 2024	0.4%	0.4%	0.4%	0.3%	0.3%
% Growth 2023-2024	1.0%	-27.4%	79.0%	194.0%	-8.2%

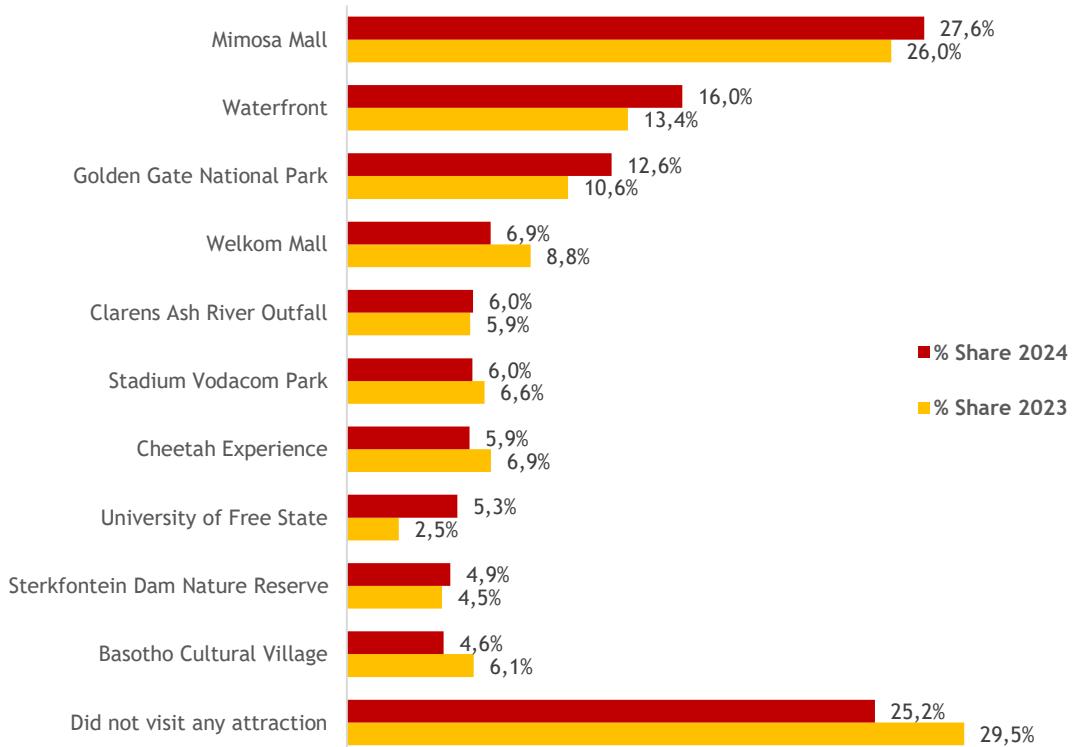
FREE STATE**0.7 MILLION**

-16.8%

**Share of Free State Tourist Arrivals by Main Purpose 2024**

■ VFR ■ Holiday ■ Business Shopping ■ Business Traveller ■ Personal Shopping
■ MICE ■ Medical ■ Religion ■ Other

Multiple responses possible.
Sum over 100%.

Free State International Tourist Top 10 Attractions (2024 vs 2023)

Multiple responses possible.
Sum over 100%.

Free State Top 15 Activities by Province 2024

■ Shopping ■ Eating out ■ Social ■ Natural Attractions
■ Beach ■ Wildlife ■ Cultural/Historical ■ Adventure
■ Business ■ Church

KWAZULU-NATAL



0.7 MILLION

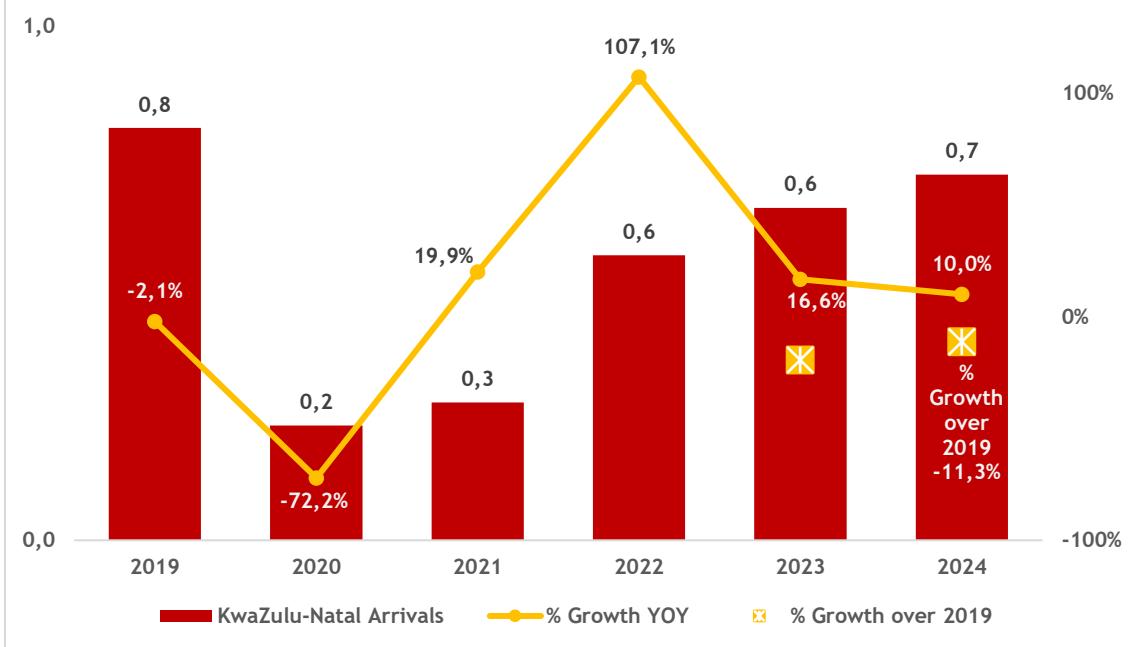
+10.0%



- KwaZulu-Natal represents 8.0% of the total international arrivals, and 6.0% of Total Direct Spend, achieving a %Spend / %Arrivals ratio of 75.9.
- KwaZulu-Natal international tourist arrivals grew steadily since 2020, reaching 0.7 million in 2024, +10.0% more than 2023.
- eSwatini is the largest source of tourists, with a 40.2% share, +14.9% against 2023, followed by Zimbabwe, at 13.6%, a +44.4% increase when compared to 2023.
- Visiting Friends and Family (VFR) was the mentioned as the main purpose for visits (49.5%), a +5.2 percentage point change vs. 2023. Holiday registered 21.4% of the responses. Business Shopping also achieved 10.6% of responses.
- Durban North Coast was the most mentioned attraction with 38.9% of responses, followed by Gateway mall and Durban North Beach at 34.1% and 24.3%, respectively. Activities are quite distributed, ranging from Beach (62.6%), Wildlife (64.5%), Shopping (76.4%) and Eating Out (82.8%).

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
KwaZulu-Natal Total	0.7	5.5	
Share	8.0%	6.0%	75.9

KwaZulu-Natal International Tourist Arrivals 2019-2024 (Millions)

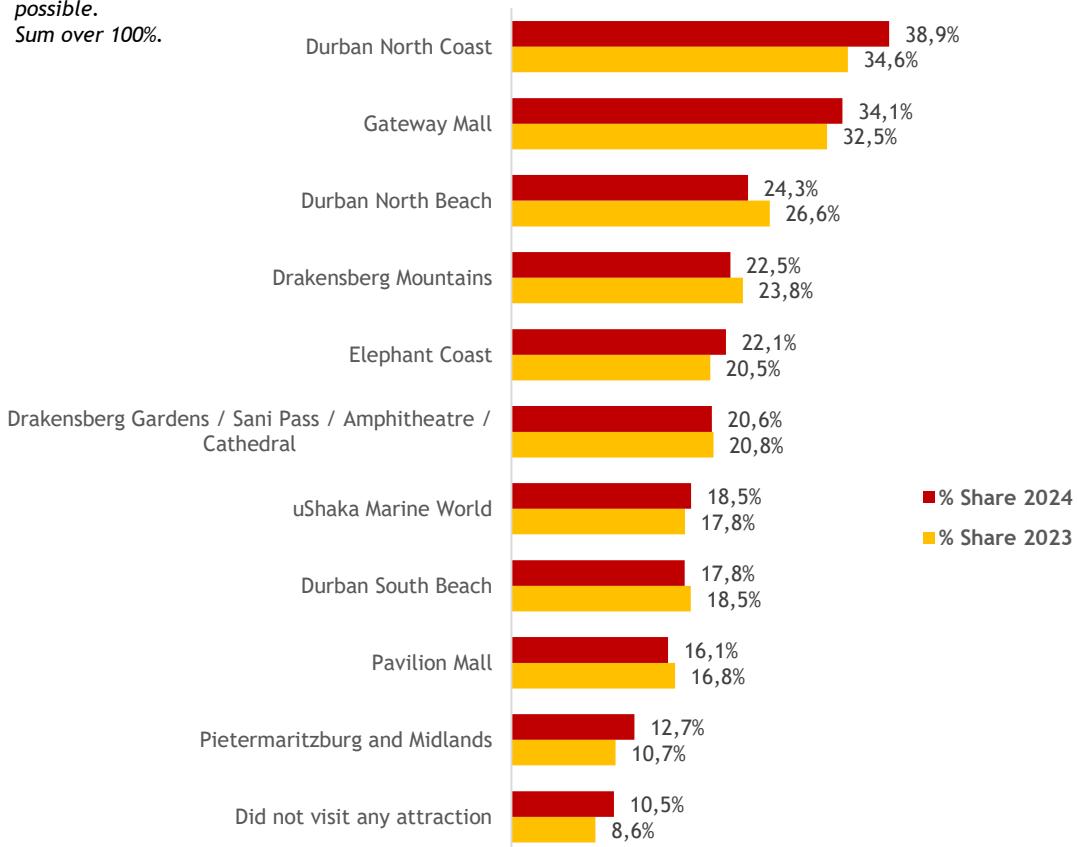


Kwa-Zulu Natal Top 10 Source Markets 2024

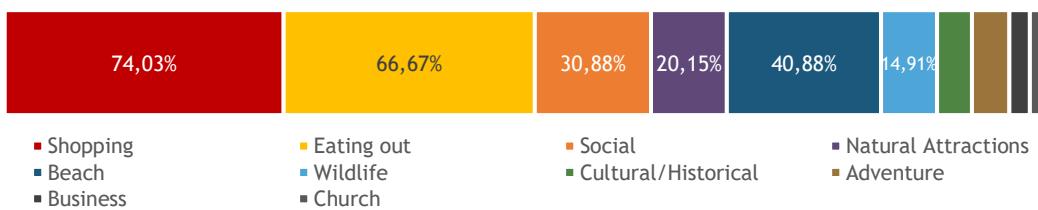
	eSwatini	Zimbabwe	USA	UK	Zambia
Arrivals	285 613	96 646	38 440	35 808	30 896
% Share 2024	40.2%	13.6%	5.4%	5.0%	4.3%
% Growth 2023-2024	14.9%	44.4%	5.5%	-18.1%	65.3%
	Lesotho	Germany	France	The Netherlands	India
Arrivals	26 975	23 716	15 343	15 274	15 051
% Share 2024	3.8%	3.3%	2.2%	2.1%	2.1%
% Growth 2023-2024	-29.3%	-7.2%	-6.5%	4.1%	7.3%

KWAZULU-NATAL**0.7 MILLION****+10.0%** **Share of KwaZulu-Natal Tourist Arrivals by Main Purpose 2024**

*Multiple responses possible.
Sum over 100%.*

KwaZulu-Natal International Tourist Top 10 Attractions (2024 vs 2023)

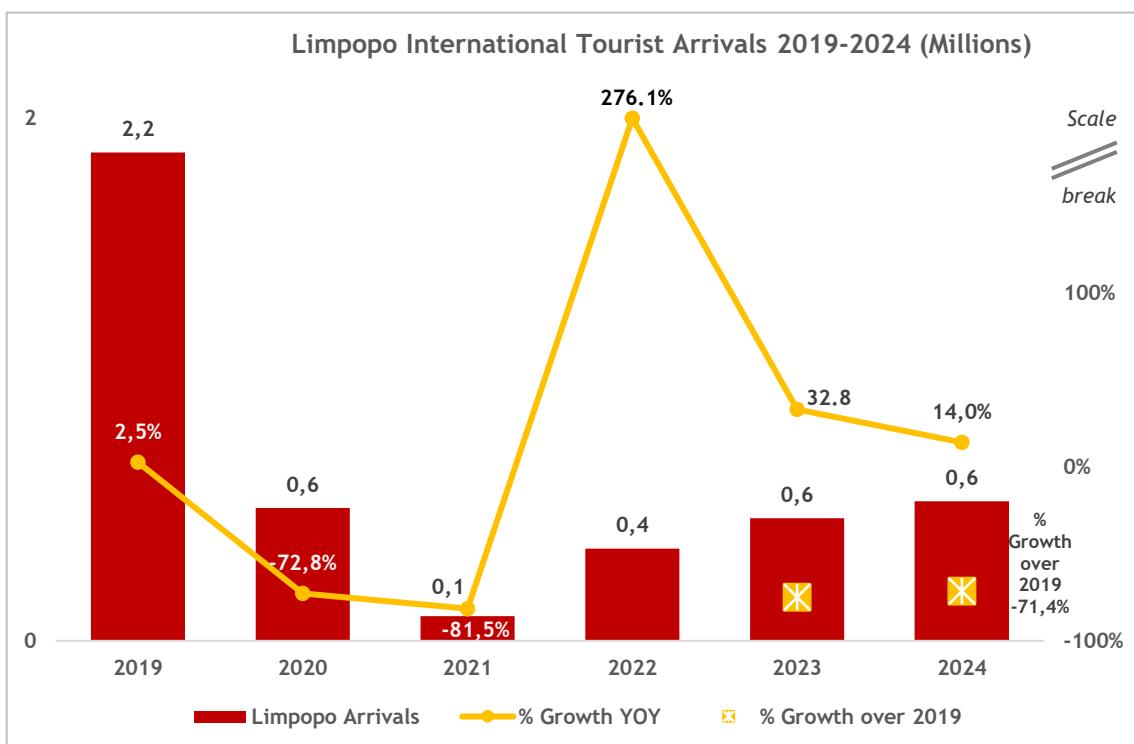
*Multiple responses possible.
Sum over 100%.*

KwaZulu-Natal Top 15 Activities by Province 2024



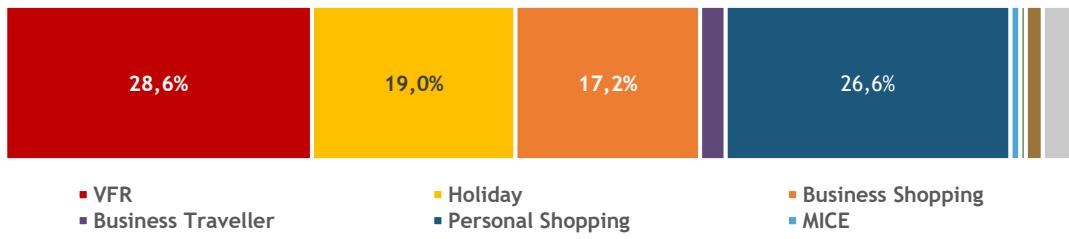
- With a Spend/Arrivals ratio of 87.0%, the Limpopo Province had a small share of arrivals of 7.2% and a share of spend of 6.3.
- International Tourist Arrivals to Limpopo continued well below the 2019 levels without a promising recovery as the arrival figures have settled at the 0.6 millions mark. Zimbabwe was the major source market during 2024, with a share of 59.5% of arrivals.
- Visiting Friends and Relatives and Business Travel are Limpopo's main purposes for travel with shares of 28.6% and 26.6%, respectively. Holiday and Business Shopping are also notable as reasons for tourist arrivals.
- Limpopo most mentioned attraction in 2024 was the Kruger National Park with an overwhelming 65.8% of mentions. Shopping and eating out form the majority of responses for activities, noteworthy is the 22.5% of responses for Wildlife.

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
Limpopo Total	0.6	5.7	
Share	7.2%	6.3%	87.0

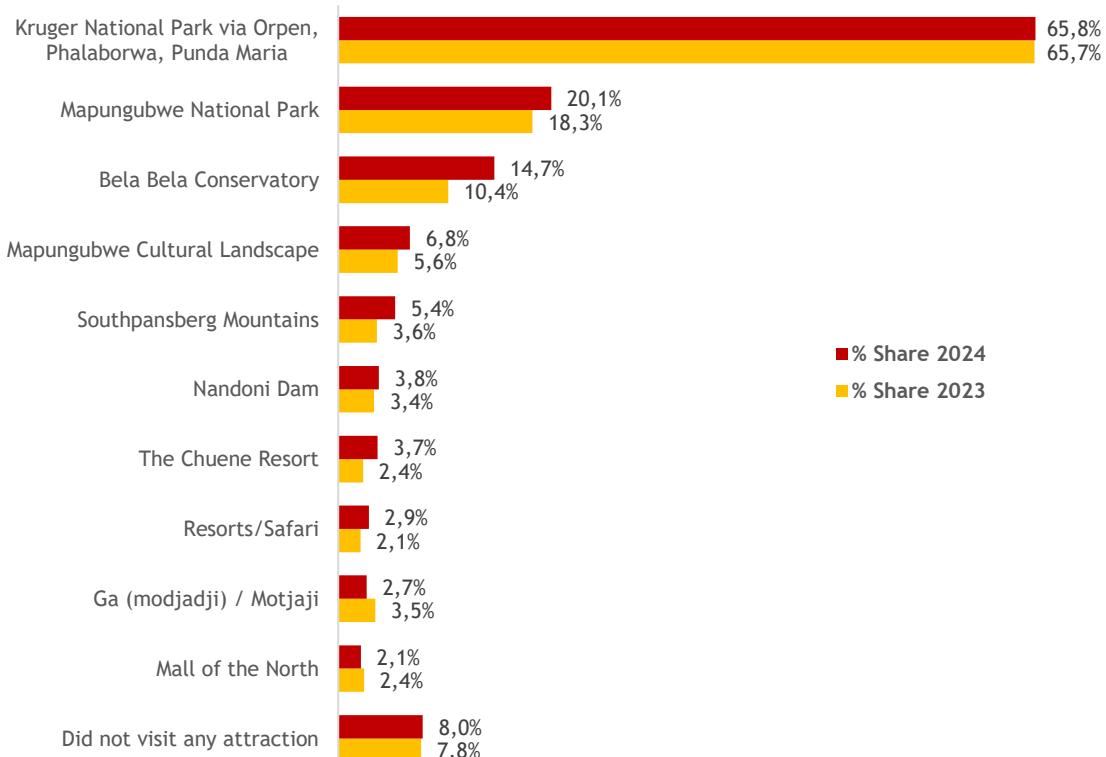


Limpopo Top 10 Source Markets 2024

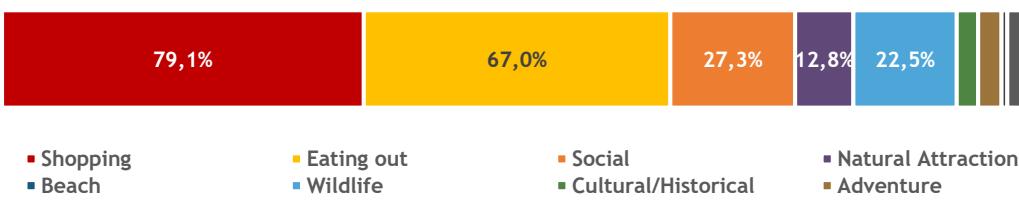
	Zimbabwe	Botswana	USA	Germany	UK
Arrivals	381 387	72 400	39 418	20 575	16 990
% Share 2024	59.5%	11.3%	6.2%	3.2%	2.7%
% Growth 2023-2024	18.4%	10.0%	9.5%	9.7%	-15.2%
	Mozambique	The Netherlands	France	Australia	eSwatini
Arrivals	15 701	11 228	9 441	7 051	5 329
% Share 2024	2.4%	1.8%	1.5%	1.1%	0.8%
% Growth 2023-2024	88.8%	-5.6%	-1.6%	-5.4%	18.2%

LIMPOPO**0.6 MILLION**+14.0% **Share of Limpopo Tourist Arrivals by Main Purpose 2024**

*Multiple responses possible.
Sum over 100%.*

Limpopo International Tourist Top 10 Attractions (2024 vs 2023)

Multiple responses possible.

Limpopo Top 15 Activities by Province 2024

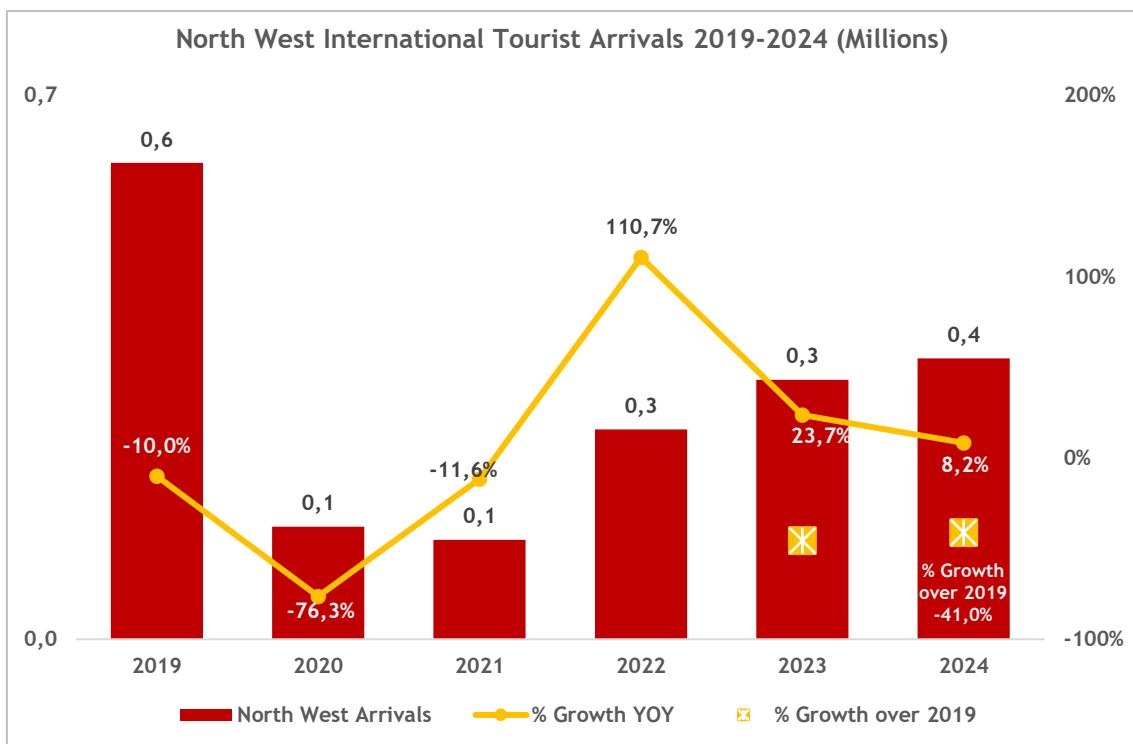
NORTH WEST**0.4 MILLION**

+8.2%



- The North West international tourist arrivals account for 4.1% of total arrivals and 2.2% of spend, resulting in a low % spend / % arrivals ratio.
- North West Tourist Arrivals reached 0.4 million, +8.2% above the 2023. The top source market was Botswana with a share of 33.7%.
- The primary reason for visiting the province was VFR (47.3%) and holidays (25.3%). The top attraction was the Pilansberg National Park mentioned by 45.5% of tourists selecting this natural attraction. Shopping and Eating Out are the most sought out activities, represent 66.2% and 63.7%, respectively, of the total mentions.

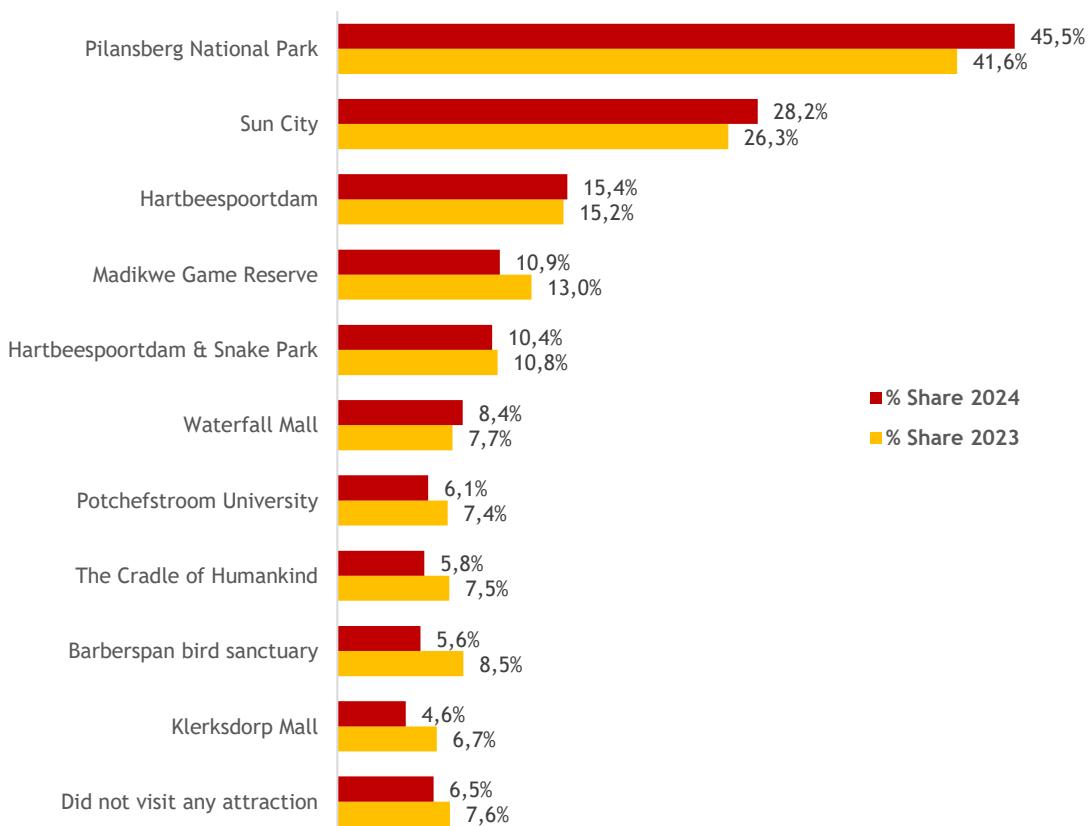
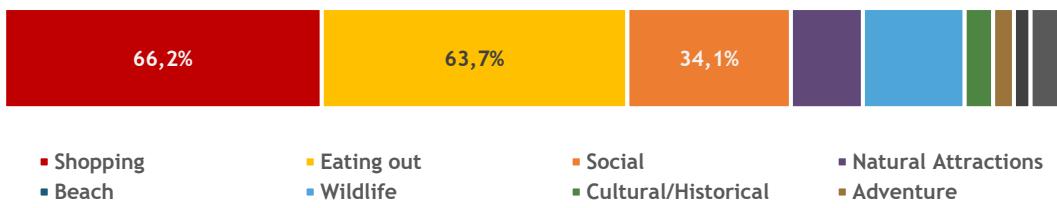
	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
North West Total	0.4	2.0	
Share	4.1%	2.2%	54.9

**North West Top 10 Source Markets 2024**

	Botswana	Zimbabwe	Lesotho	USA	UK
Arrivals	121 862	56 405	51 078	18 293	14 538
% Share 2024	33.7%	15.6%	14.1%	5.1%	4.0%
% Growth 2023-2024	14.3%	-7.1%	1.2%	18.1%	16.1%
	Mozambique	Germany	eSwatini	Namibia	Australia
Arrivals	10 415	10 144	9 644	7 289	5 932
% Share 2024	2.9%	2.8%	2.7%	2.0%	1.6%
% Growth 2023-2024	-4.1%	19.4%	35.8%	3.9%	14.7%

NORTH WEST**0.4 MILLION**

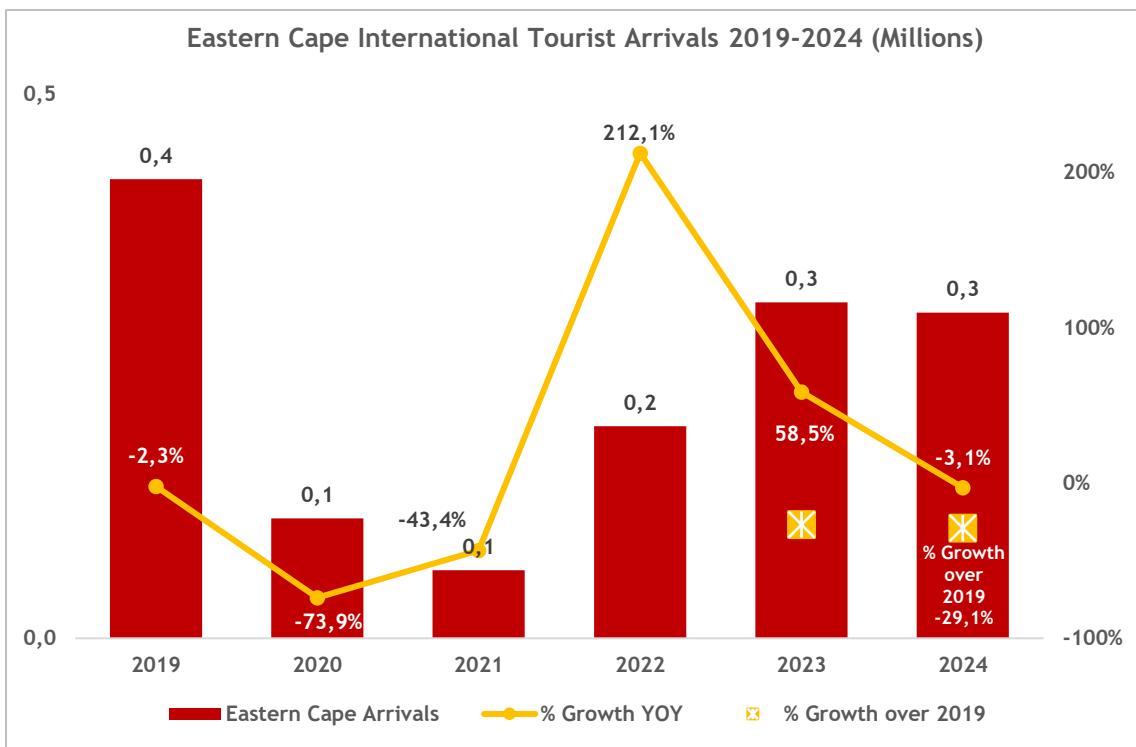
+8.2%

**Share of North West Tourist Arrivals by Main Purpose 2024***Multiple responses possible.***North West International Tourist Top 10 Attractions (2024 vs 2023)***Sum over 100%.**Multiple responses possible.***North West Top 15 Activities by Province 2024***Sum over 100%.*



- The Province reaches the third largest ratio between % spend and % arrivals, producing a ratio of 135.9.
- Tourist Arrivals in Eastern Cape amounted to 0.3 million. The three main source countries are Zimbabwe (13.4%), the UK (12.4%) and Germany (12.3%).
- Visiting Friends and Family and Holiday account for the largest reasons for visiting, with 37.3% and 45.2% share, respectively. As mentioned previously, this is one of the two provinces where Holiday surpassed VFR as the reason for travel.
- Eastern Cape's main attractions were Addo Elephant Park, Storms River, Board Walk Mall and Bloukrans bungee jump. Apart for the generally highly mentioned responses for shopping, eating out and social activities, the Eastern Cape received a high proportion of mentions for Adventure. The Eastern Cape also received a good spread of mentions across other activities.

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
Eastern Cape Total	0.3	4.2	
Share	3.4%	4.6%	135.9

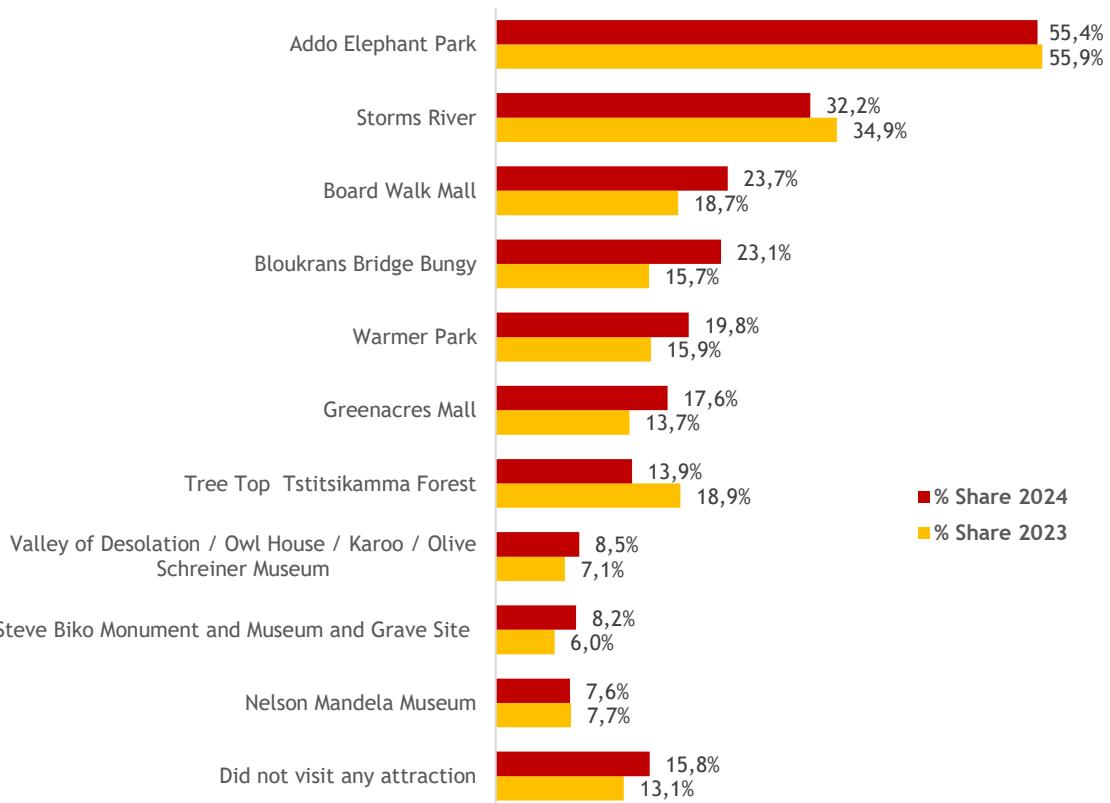


Eastern Cape Top 10 Source Markets 2024

	Zimbabwe	UK	Germany	USA	The Netherlands
Arrivals	40 105	37 185	36 860	26 087	16 961
% Share 2024	13.4%	12.4%	12.3%	8.7%	5.7%
% Growth 2023-2024	4.0%	-7.3%	-13.7%	0.3%	-16.7%
	France	Lesotho	Australia	Canada	Switzerland
Arrivals	12 503	12 118	10 348	6 665	6 372
% Share 2024	4.2%	4.1%	3.5%	2.2%	2.1%
% Growth 2023-2024	-6.6%	-15.4%	-1.3%	30.9%	-13.9%

EASTERN CAPE**0.3 MILLION****-3.1% ▼****Share of Eastern Cape Tourist Arrivals by Main Purpose 2024**

- VFR
- Holiday
- Business Shopping
- MICE
- Medical
- Religion
- Business Traveller
- Personal Shopping
- Other

Eastern Cape International Tourist Top 10 Attractions (2024 vs 2023)

- % Share 2024
- % Share 2023

*Multiple responses possible.
Sum over 100%.*

Eastern Cape Top 15 Activities by Province 2024

- Shopping
- Beach
- Eating out
- Wildlife
- Social
- Cultural/Historical
- Natural Attractions
- Adventure

NORTHERN CAPE**0.1 MILLION**

-31.5%



- Although Northern Cape only represents 0.8% of International tourist arrivals and 1.5% of Total Direct Foreign Spend, % Spend / % Arrivals ratio is the highest among all provinces.
- During 2024, the Northern Cape received 0.1 million international tourist arrivals. The main source market, with a 36.8% share, and a -44.4% decrease from the previous year, is neighboring Namibia.
- Visiting Friends and Relatives and Holiday are the largest reasons for visiting the province
- The Northern Cape's main attraction was Kimberley Big Hole with 33.2% of responses.
- Shopping, Eating Out and Social activities were the most mentioned.

	International Tourist Arrivals (Millions)	Total Direct Foreign Spend (ZAR Bn)	Ratio % Spend / % Arrivals
Total Arrivals	8.9	91.6	
Northern Cape Total	0.1	1.4	
Share	0.8%	1.5%	179.7

**Northern Cape Top 10 Source Markets 2024**

	Namibia	Lesotho	Zimbabwe	USA	Botswana
Arrivals	27 643	11 149	8 714	5 425	2 418
% Share 2024	36.8%	14.8%	11.6%	7.2%	3.2%
% Growth 2023-2024	-44.4%	-30.5%	-29.9%	28.8%	4.2%
	UK	Germany	Russian Federation	The Netherlands	Australia
Arrivals	2 097	1 809	1 738	1 333	1 166
% Share 2024	2.8%	2.4%	2.3%	1.8%	1.6%
% Growth 2023-2024	-36.1%	-40.4%	89.7%	-43.1%	-30.2%

NORTHERN CAPE**0.1 MILLION**

-31.5%

**Share of Northern Cape Tourist Arrivals by Main Purpose 2024**

■ VFR

■ Business Traveller

■ Medical

■ Holiday

■ Personal Shopping

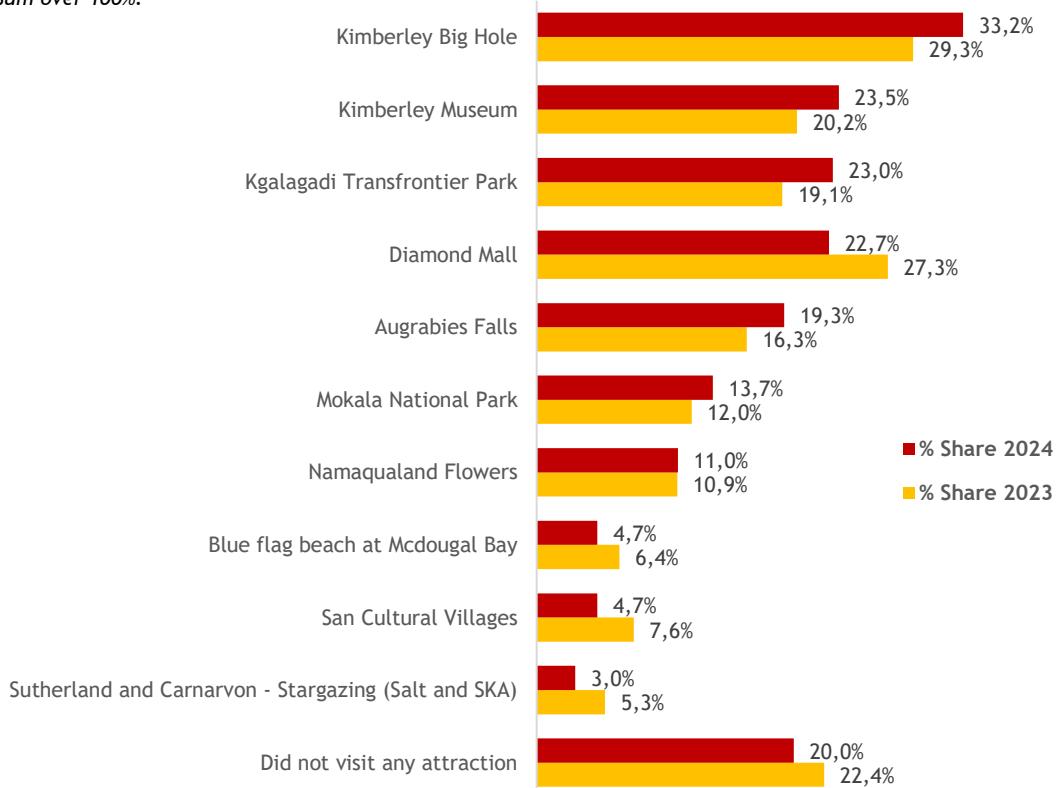
■ Religion

■ Business Shopping

■ MICE

■ Other

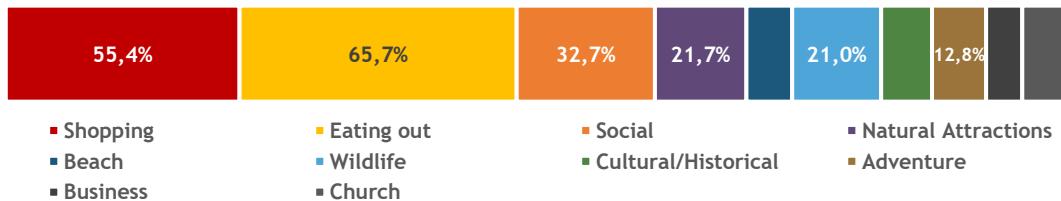
Multiple responses possible.
Sum over 100%.

Northern Cape International Tourist Top 10 Attractions (2024 vs 2023)

■ % Share 2024

■ % Share 2023

Multiple responses possible.
Sum over 100%.

Northern Cape Top 15 Activities by Province 2024

■ Shopping
■ Beach
■ Business

■ Eating out
■ Wildlife
■ Church

■ Social
■ Cultural/Historical

■ Natural Attractions
■ Adventure



Inspiring new ways



TECHNICAL NOTES

TECHNICAL NOTES

MEASURE OF PRECISION

This section provides an overview of the standard error, confidence interval, and coefficient of variation (CV) for TFDS and Bed Nights. Estimates were computed based on a complex multi-stage survey design with stratification, clustering, and unequal weighting.

Confidence Intervals are a range of values derived from the survey data that likely contains the true population parameter (e.g. spend) with a specified level of confidence (usually 95%). Confidence intervals provide a measure of the uncertainty or precision of the survey estimate. A narrower interval indicates greater precision.

Standard Error is the standard deviation of the sampling distribution of a statistic, such as the mean or proportion. The standard error quantifies the amount of variation in the sample estimate and is used to construct confidence intervals. Smaller standard errors indicate more precise estimates.

Coefficient of Variation (CV) is a measure of relative variability, calculated as the ratio of the standard error to the mean, often expressed as a percentage. The CV allows for comparison of the precision of different metrics, regardless of their scale, by indicating the degree of variability in relation to the mean.

Sample Size (N) are the number of observations or respondents included in the survey. A larger sample size generally leads to more precise estimates, reducing the standard error and margin of error. It is a fundamental determinant of the precision of survey results.

Alphabetic	CV	Interpretation
A.	0.0% - 0.5%	
B.	0.6% - 1.0%	
C.	1.1% - 2.5%	
D.	2.6% - 5.0%	
E.	5.1% - 10.0%	
F.	10.1 % - 16.5%	
G.	16.6% - 25.0%	Reliable enough for most purposes
H.	25.1% - 33.4%	Use with caution
I.	+33.5%	Data not published

Measures of precision for Total Spend (TFDS) and Bed Nights n=valid of the total arrival tourists for the quarter

A. FOR THE ENTIRE DEPARTURE SURVEY

Variable	N	Mean	95% Confidence Interval		Standard Error	Coefficient of Variation
Total Spend (TFDS)	8 333 023	R10 992	R10 973	R11 012	10.077	0.092
Total Bed Nights	8 649 081	13.25	13.24	13.26	0.006	0.047

C. FOR OVERSEAS

Variable	N	Mean	95% Confidence Interval		Standard Error	Coefficient of Variation
Total Spend (TFDS)	242 114	R23 307	R23 122	R23 492	94.501	0.405
Total Bed Nights	243 664	15.35	15.23	15.46	0.060	0.392

B. FOR AFRICA

Variables	N	Mean	95% Confidence Interval		Standard Error	Coefficient of Variation
Total Spend (TFDS)	6 171 994	R5 873	R5 856	R5 890	8.622	0.147
Total Bed Nights	6 468 357	12.55	12.54	12.56	0.007	0.053

SAMPLING

The unit of measurement for this survey is an international tourist, defined according to the global standard set by the United Nations World Tourism Organisation (UNWTO).

The research universe encompasses all individuals eligible to participate in the Departure Survey, with respondents selected based on six criteria:

- i. The respondent must not be a South African resident.
- ii. The respondent must have spent at least one night in South Africa.
- iii. The respondent must not have spent more than 365 days in South Africa.
- iv. For the airport survey, the respondent must have spent their time outside the airport.
- v. The respondent must not have received any income during their trip to South Africa.
- vi. The respondent must not have been interviewed by South African Tourism in the past six months.

The availability of this participant universe at airports is strictly governed by adherence to a pre-agreed interviewing schedule. Each month, the survey is conducted over two weeks at ORTIA and CTIA. Stratification by region of origin and market, aligned with airline schedules, also influences the randomisation of the sampling process. Despite this overall stratified sampling design, all respondents are filtered to ensure they meet the above criteria.

To manage interviews effectively, airports are divided into sampling zones where interviewers are allocated specific areas where potential respondents congregate while waiting to board their flights. Respondents are approached after they have completed immigration formalities.

While airport survey interviews occur in departure lounges after passengers have completed exit formalities, land border post surveys present additional complexities due to a lack of structured waiting periods before departure. Successful data collection has been achieved by intercepting and randomly sampling tourists at three key intervention points: arrival at the border gate, processing of formalities, and preparation for departure from the border gate.

At each of these points, interviewers approach every fifth person (or party). Only one individual from each party traveling together is recruited for participation. At the arrival point, a pre-screening phase occurs where no interviews are conducted; instead, respondents' willingness to participate is gauged while introducing survey details. In-queue sampling consists of both a pre-screening phase and a confirmation phase for individuals already screened upon entry at the land border post. Actual interviews take place at designated interviewing stations equipped with tables and chairs after respondents exit formalities.

METHODOLOGY & FIELDWORK

Methodology

To gather the necessary information, quantitative research serves as the core methodology for this study. Data collection is primarily conducted using structured questionnaires, which consist mainly of pre-coded questions alongside a few open-ended questions. The open-ended questions aim to provide deeper insights into factors influencing the phenomena under investigation.

The methodology employed for the Departure Survey is Tablet-Assisted Personal Interviewing (TAPI/CAPI). This approach involves face-to-face interviews where data is entered directly into a tablet, eliminating the need for paper forms. Trained and experienced interviewers conduct these interviews using concise Departure Survey questionnaires. The questionnaires are translated into all key market languages, and the interviewing team comprises multilingual individuals fluent in necessary foreign languages, thereby minimizing communication errors.

Fieldwork

The Departure Survey fieldwork targets tourists as they exit the country through 12 border posts and two major airports: OR Tambo International Airport (ORTIA) and Cape Town International Airport (CTIA). Interviews are conducted in the various languages predominantly spoken at these exit points, as well as in languages chosen by respondents from different regions around the world. Given that most visitors arrive and depart primarily by air and through land border posts, the Departure Survey includes:

- i. Airport Intervention
- ii. Land Border Post Intervention

WEIGHTING

The survey data is weighted at the country level using the South African Home Affairs Monthly Tourist Mode Arrival Data received from Statistics South Africa (STATS SA).

Country Tourists Mode Arrivals are distinguished mainly into either Total Air Arrivals or Total Road Arrivals. Consequently, tourists from one country may have different weights depending on whether their mode of arrival in South Africa is Air or Road.

The individuals' weights are derived by dividing the Monthly Country Tourist Mode Counts for Air or Road arrivals by Survey Data variable 'Country of Residence' frequencies for Airports or LBP, respectively.

NB: A special case exists for China, Hong Kong, and Macao that ought to be combined into one when weights are being calculated - and for any other subsequent analysis.

NORMALISING SPEND DATA

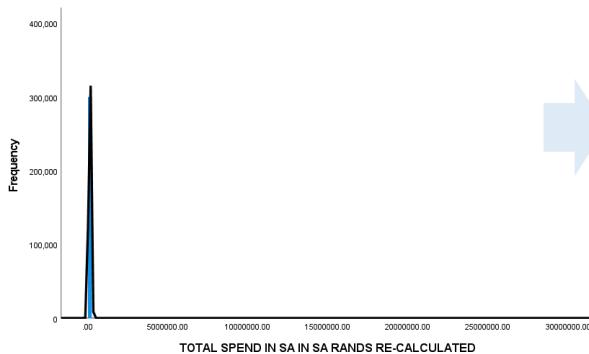
SA Tourism reviewed its performance over the past years. In those years, we have grown the survey of air arrivals from a summer and winter survey to a monthly survey at two airports and started surveying land arrivals at the 10 busiest land border posts every month. The review provided an opportunity to measure what our marketing has achieved in the past four years and review the departure survey methodology using trend data.

Of particular concern to us was the spend data, which we have been cleaning every quarter. A large number of responses fall below the mean, with several large outliers. Analysing the data confirmed that the responses were valid as the low spenders were mainly from SADC and stayed for only one or two nights. The higher spenders from SADC bought items such as houses and motor cars. As expected, people who stay longer spend more.

Furthermore, spend is seasonal and varies from month to month. Therefore, outliers also vary from one month to the next. The rules for normalising data must be consistent and take these seasonal variations into account. Analysis of spend data showed that the distribution of spend closely resembles an exponential curve rather than a normal curve, which we have been using in our cleaning rules.

SA spend distribution is much closer to an exponential curve than a normal curve; the majority of responses are below the mean with a few very high outliers

SA Spend 2019-2024
(All Responses, unweighted)



- Mean = R20 325.34
- Std. Dev. = 83930.91
- N = 301 238

Source: 2017-2021 SAT Departure Survey.

NORMALISING SPEND DATA CONTINUED

Transform the log values back to spend values using the following formula:

Exclude all variables that fall outside the cut-off values.

The normalisation process leads to the following results for 2024:

$$\text{Log_Low_cut_off} = \text{Mean} - 3^*\text{Stdev}$$
$$\text{Log_Upper_cut_off} = \text{Mean} + 3^*\text{Stdev}$$

$$\text{Lower-cut-off Value} = 10^{(\text{Log_Low_cut_off})}$$
$$\text{Upper-cut-off Value} = 10^{(\text{Log_Upper_cut_off})}$$

Based on this information, SA Tourism has revised the methodology for normalizing spend data.

This chapter provides the details of how the data has been normalized.

SA Tourism now normalizes the spend data by eliminating 3-standard deviations from the logarithmic mean.

$$y = \log_{10}(x)$$

Compute log of spend variable using the formula above

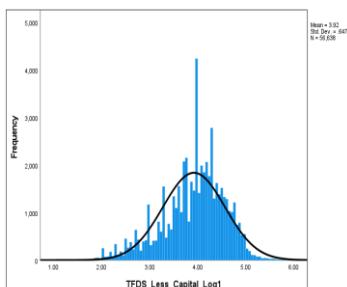
Calculate the mean of the result obtained in (1) above.

Determine the cut-off criteria using the following formula:

SA Spend Logarithmic Values

Plotting the log of the SA spend produces a normal distribution allowing us to eliminate values outside 3 SDs from the mean

Log Spend in SA w/o Capex (unweighted)

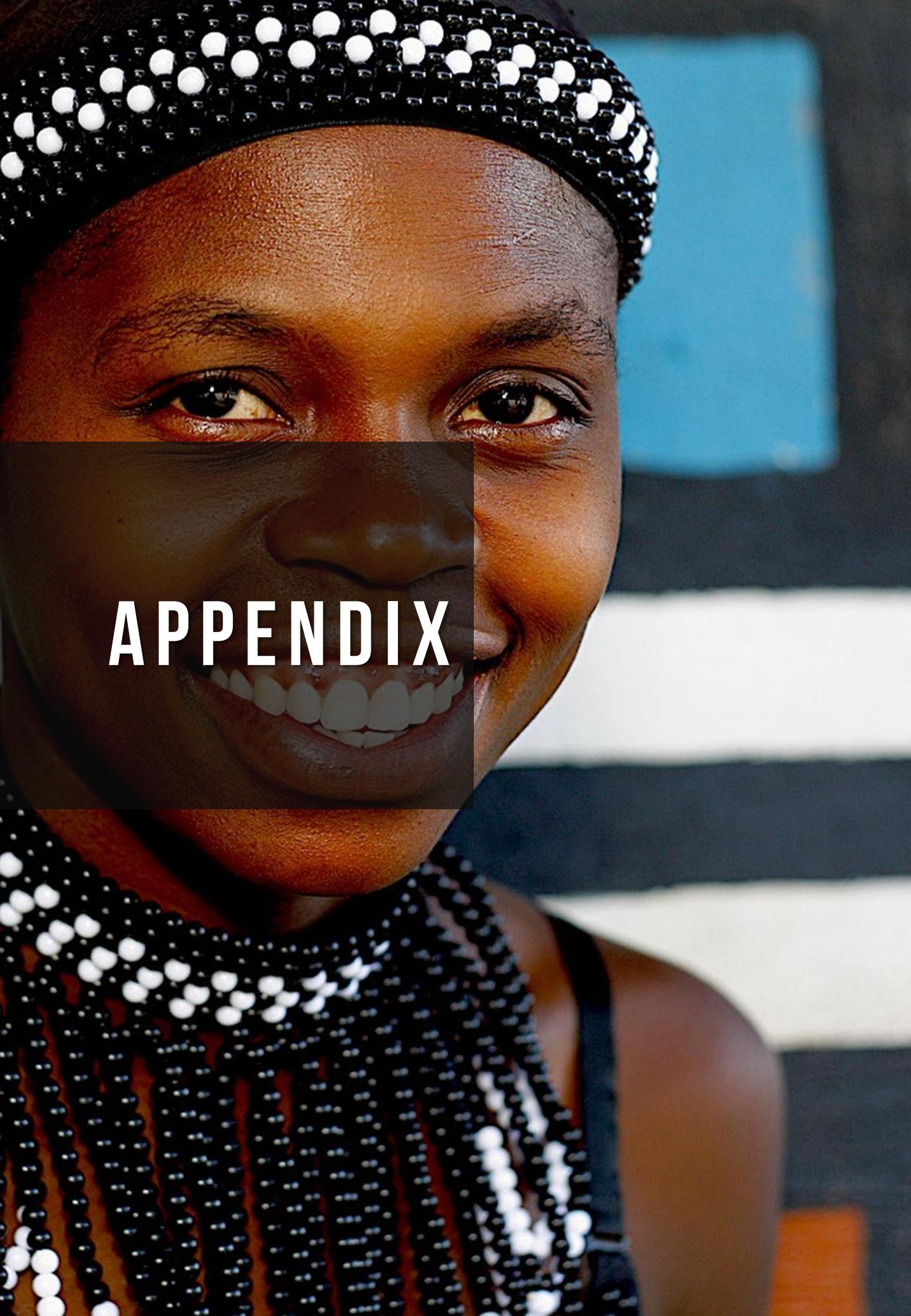


Corresponding Spend Values after elimination (unweighted)

- Min. Spend = ZAR 0
- Mean Spend = ZAR 36 247
- Max Spend = ZAR 872 000
- N = 56 645

Minimum	Mean	Maximum	Std. Deviation
1.85	3.92	5.94	0.64709

Source: 2021 SAT Departure Survey.



APPENDIX



INTERNATIONAL TOURISTS ARRIVALS

APPENDIX

INTERNATIONAL TOURIST ARRIVALS				
	2022	2023	2024	% YOY GROWTH
Africa	4 237 261	6 410 392	6 770 664	5.6%
Botswana	262 232	363 025	395 965	9.1%
Lesotho	835 921	1 163 826	974 369	-16.3%
Malawi	114 352	138 918	163 726	17.9%
Mozambique	944 308	1 341 037	1 591 751	18.7%
Namibia	137 388	160 078	164 716	2.9%
Swaziland	403 762	733 949	842 318	14.8%
Zambia	116 076	145 244	154 921	6.7%
Zimbabwe	1 233 790	2 106 940	2 183 260	3.6%
Angola	32 194	39 265	37 811	-3.7%
Dem Rep of Congo	17 571	23 211	28 940	24.7%
Ethiopia	5 001	6 489	7 432	14.5%
Ghana	14 381	14 724	36 656	149.0%
Kenya	21 308	42 403	47 852	12.9%
Nigeria	16 104	18 809	22 511	19.7%
Tanzania	26 268	34 240	37 579	9.8%
Uganda	9 294	12 874	12 788	-0.7%
Other Africa	47 311	65 360	68 069	4.1%
Asia	117 852	199 308	207 718	4.2%
China including Hong Kong	12 219	37 334	41 651	11.6%
India	55 506	79 774	75 541	-5.3%
Japan	5 513	13 176	17 370	31.8%
Malaysia	2 764	5 659	6 629	17.1%
Singapore	2 821	7 292	9 390	28.8%
Rep of Korea (South)	5103	10436	12811	22.8%
Other Asia	33 926	45 637	44 326	-2.9%
Australasia	65 288	105 888	119 036	12.4%
Australia	53 769	86 250	98 544	14.3%
New Zealand	11 290	19 349	20 138	4.1%
Other Australasia	229	289	354	22.5%
CENTRAL & SOUTH AMERICA	28 516	46 870	75 160	60.4%
Argentina	2 381	3 805	5 422	42.5%
Brazil	14 727	25 672	49 855	94.2%
Chile	1 128	2 173	3 171	45.9%
Other Central & South America	10 280	15 220	16 712	9.8%
Europe	900 703	1 244 877	1 258 706	1.1%
Austria	14 043	20 894	21 313	2.0%
Belgium	34 826	46 348	45 225	-2.4%
Denmark	14 240	17 995	17 874	-0.7%
Finland	4 424	6 580	6 216	-5.5%
France	76 077	119 974	125 823	4.9%
Germany	173 146	245 259	254 992	4.0%
Ireland	20 817	27 282	28 343	3.9%
Italy	32 357	52 091	50 780	-2.5%
Netherlands	90 289	131 371	132 422	0.8%
Norway	9 149	13 048	13 600	4.2%
Portugal	16 092	19 285	20 105	4.3%
Russian Fed	16 234	28 357	30 734	8.4%
Spain	23 304	32 020	31 166	-2.7%
Sweden	17 381	24 543	24 562	0.1%
Switzerland	33 257	42 654	42 255	-0.9%
Turkey	8 840	12 925	14 353	11.0%
UK	283 031	356 160	349 883	-1.8%
Other Europe	33 196	48 091	49 060	2.0%
Middle East	40 628	54 339	45 602	-16.1%
United Arab Emirates	3 100	6 511	6 717	3.2%
Other Middle East	37 528	47 828	38 885	-18.7%
North America	297 684	409 031	430 419	5.2%
Canada	35 501	55 056	58 057	5.5%
USA	262 183	353 975	372 362	5.2%
UNSPECIFIED	10 130	12 628	12 065	-4.5%
TOTAL	5 698 062	8 483 333	8 919 370	5.1%



SPEND IN SOUTH
AFRICA

APPENDIX

TOTAL FOREIGN DIRECT SPEND (TFDS) BY COUNTRY				
	2022	2023	2024	% YOY GROWTH
AFRICA	R23 314 729 018	R42 639 448 156	R41 893 417 086	-1.7%
Botswana	R884 843 305	R1 333 273 934	R1 085 077 068	-18.6%
Lesotho	R2 115 117 032	R2 469 940 106	R2 118 682 107	-14.2%
Malawi	R1 433 192 294	R3 728 517 354	R3 386 652 428	-9.2%
Mozambique	R3 610 613 606	R4 159 516 761	R5 433 441 733	30.6%
Namibia	R1 116 654 230	R1 206 914 242	R1 421 920 535	17.8%
Swaziland	R757 176 700	R1 292 598 739	R1 309 549 846	1.3%
Zambia	R1 500 082 283	R3 388 961 489	R3 592 096 297	6.0%
Zimbabwe	R7 870 082 703	R19 967 099 192	R17 902 999 672	-10.3%
Angola	R966 699 888	R980 660 068	R912 272 813	-7.0%
DRC	R521 338 630	R691 341 685	R678 047 499	-1.9%
Ethiopia	R79 923 393	R97 812 470	R119 815 819	22.5%
Ghana	R322 597 500	R375 024 399	R715 128 321	90.7%
Kenya	R351 135 935	R736 634 575	R753 875 940	2.3%
Nigeria	R369 052 406	R427 747 123	R449 441 292	5.1%
Tanzania	R352 111 760	R388 896 156	R470 368 073	20.9%
Uganda	R164 729 611	R266 423 455	R233 020 882	-12.5%
Other Africa	R899 377 741	R1 128 086 408	R1 311 026 761	16.2%
ASIA	R2 090 050 251	R4 072 482 235	R3 697 681 173	-9.2%
China including Hong Kong	R283 791 297	R1 048 055 434	R972 762 798	-7.2%
India	R989 812 158	R1 551 629 243	R1 303 755 305	-16.0%
Japan	R125 810 974	R270 059 074	R270 236 873	0.1%
Malaysia	R46 233 334	R99 248 768	R125 902 958	26.9%
Singapore	R66 542 104	R135 362 891	R178 102 378	31.6%
South Korea	R98 405 770	R212 573 048	R255 664 918	20.3%
Other Asia	R479 454 613	R755 553 776	R591 255 943	-21.7%
AUSTRALASIA	R1 622 538 131	R2 575 941 351	R2 601 339 143	1.0%
Australia	R1 350 310 348	R2 081 470 016	R2 184 385 028	4.9%
New Zealand	R269 607 745	R488 145 451	R416 605 308	-14.7%
Other Australasia	R2 620 037	R6 325 884	R348 807	-94.5%
CENTRAL & SOUTH AMERICA	R731 269 059	R1 111 434 771	R1 482 069 414	33.3%
Argentina	R76 199 085	R119 408 454	R120 873 462	1.2%
Brazil	R395 543 462	R655 567 163	R1 047 408 505	59.8%
Chile	R31 989 376	R53 972 835	R70 183 501	30.0%
Other Central & South America	R227 537 136	R282 486 318	R243 603 946	-13.8%
EUROPE	R21 514 444 288	R31 890 969 401	R28 295 444 113	-11.3%
Austria	R371 407 141	R629 706 464	R535 492 650	-15.0%
Belgium	R749 340 555	R967 678 371	R813 401 692	-15.9%
Denmark	R412 262 597	R559 634 029	R541 888 980	-3.2%
Finland	R139 142 227	R207 057 682	R168 470 507	-18.6%
France	R1 782 044 571	R2 957 371 819	R2 449 047 521	-17.2%
Germany	R4 374 518 322	R6 329 482 938	R5 413 006 963	-14.5%
Ireland	R483 318 343	R656 259 904	R783 380 538	19.4%
Italy	R664 948 398	R1 124 330 908	R974 247 033	-13.3%
Netherlands	R2 152 139 805	R3 100 610 723	R2 854 894 535	-7.9%
Norway	R211 177 815	R358 814 844	R334 547 220	-6.8%
Portugal	R238 608 256	R404 712 694	R322 380 837	-20.3%
Russian Fed	R460 072 016	R886 139 013	R779 867 860	-12.0%
Spain	R492 796 097	R770 646 757	R660 441 371	-14.3%
Sweden	R388 521 654	R584 918 457	R485 027 210	-17.1%
Switzerland	R999 515 981	R1 408 061 532	R1 211 981 159	-13.9%
Turkey	R225 269 982	R369 844 540	R303 998 391	-17.8%
UK	R6 670 832 462	R9 433 481 231	R8 871 657 238	-6.0%
Other Europe	R698 528 067	R1 142 217 494	R791 712 408	-30.7%
MIDDLE EAST	R1 089 036 578	R1 327 538 782	R1 106 453 359	-16.7%
UAE	R84 202 662	R119 730 561	R162 481 689	35.7%
Other Middle East	R1 004 833 917	R1 207 808 222	R943 971 670	-21.8%
NORTH AMERICA	R9 278 531 109	R11 138 415 974	R12 523 543 901	12.4%
Canada	R938 718 633	R1 262 730 517	R1 068 084 813	-15.4%
USA	R8 339 761 016	R9 875 520 668	R11 455 450 088	16.0%
Other North American	R51 459	R164 788	R9 000	-94.5%
TOTAL	R59 640 598 434	R94 756 230 670	R91 599 948 189	-3.3%

APPENDIX

AVERAGE SPEND				
	2022	2023	2024	% YOY GROWTH
AFRICA	R5 600	R6 900	R6 500	-5.8%
Botswana	R3 500	R3 800	R2 800	-26.3%
Lesotho	R2 600	R2 200	R2 300	4.5%
Malawi	R12 500	R27 100	R21 000	-22.5%
Mozambique	R3 900	R3 200	R3 500	9.4%
Namibia	R8 200	R7 500	R8 600	14.7%
Swaziland	R1 900	R1 700	R1 600	-5.9%
Zambia	R12 900	R23 600	R23 600	0.0%
Zimbabwe	R6 300	R9 600	R8 500	-11.5%
Angola	R34 600	R30 400	R30 800	1.3%
DRC	R34 600	R34 400	R26 500	-23.0%
Ethiopia	R18 600	R17 100	R18 000	5.3%
Ghana	R23 400	R27 500	R22 700	-17.5%
Kenya	R17 900	R19 600	R18 600	-5.1%
Nigeria	R26 200	R26 200	R22 000	-16.0%
Tanzania	R21 900	R19 100	R21 500	12.6%
Uganda	R19 300	R22 500	R19 600	-12.9%
Other Africa	R24 900	R21 900	R24 000	9.6%
ASIA	R22 700	R24 600	R21 300	-13.4%
China including Hong Kong	R31 000	R30 700	R25 100	-18.2%
India	R21 200	R22 600	R20 200	-10.6%
Japan	R24 200	R21 600	R17 600	-18.5%
Malaysia	R18 500	R19 300	R20 400	5.7%
Singapore	R24 800	R19 200	R19 500	1.6%
South Korea	R23 600	R23 000	R22 900	-0.4%
Other Asia	R22 100	R26 300	R20 800	-20.9%
AUSTRALASIA	R25 700	R25 700	R23 500	-8.6%
Australia	R26 000	R25 500	R23 900	-6.3%
New Zealand	R24 700	R26 500	R22 000	-17.0%
Other Australasia	R17 800	R49 400	R5 800	-88.3%
CENTRAL & SOUTH AMERICA	R31 900	R30 200	R23 400	-22.5%
Argentina	R34 600	R32 900	R23 600	-28.3%
Brazil	R30 900	R29 200	R23 100	-20.9%
Chile	R30 900	R26 300	R24 400	-7.2%
Other Central & South America	R33 000	R32 700	R24 200	-26.0%
EUROPE	R25 900	R28 300	R24 900	-12.0%
Austria	R28 100	R32 700	R27 500	-15.9%
Belgium	R23 900	R23 900	R20 400	-14.6%
Denmark	R30 200	R32 900	R31 800	-3.3%
Finland	R33 700	R33 500	R29 000	-13.4%
France	R25 900	R28 100	R22 200	-21.0%
Germany	R27 200	R28 500	R23 800	-16.5%
Ireland	R24 300	R27 200	R29 100	7.0%
Italy	R22 200	R23 400	R21 100	-9.8%
Netherlands	R26 600	R27 700	R25 200	-9.0%
Norway	R25 300	R29 100	R29 700	2.1%
Portugal	R23 900	R31 500	R24 100	-23.5%
Russian Fed	R30 100	R33 300	R27 300	-18.0%
Spain	R23 500	R27 100	R23 600	-12.9%
Sweden	R23 500	R25 000	R20 700	-17.2%
Switzerland	R32 100	R36 000	R31 100	-13.6%
Turkey	R28 300	R31 600	R22 800	-27.8%
UK	R24 600	R27 700	R26 500	-4.3%
Other Europe	R27 300	R31 200	R21 400	-31.4%
MIDDLE EAST	R30 900	R27 600	R28 700	4.0%
UAE	R27 900	R19 300	R24 200	25.4%
Other Middle East	R31 200	R28 800	R29 600	2.8%
NORTH AMERICA	R32 900	R31 800	R31 200	-1.9%
Canada	R28 300	R25 100	R20 300	-19.1%
USA	R33 500	R32 900	R32 900	0.0%
Other North American	R12 800	R41 100	R9 000	-78.1%
OVERALL	R10 900	R11 800	R10 900	-7.6%

APPENDIX

TFDS BY PURPOSE OF VISIT

	2022	2023	2024
Holiday	R20 780 466 282	R30 400 766 205	R28 718 524 961
Personal Shopping	R1 753 559 811	R3 033 476 997	R2 583 948 053
Business Shopping	R4 729 108 045	R12 612 122 279	R12 349 202 689
Business Traveller	R5 167 396 396	R8 546 262 975	R8 133 861 749
MICE	R3 725 011 663	R4 897 137 638	R4 967 275 061
Medical	R1 471 299 539	R1 861 460 680	R1 546 564 218
VFR	R17 295 762 804	R26 074 108 536	R26 857 909 785
Religion	R225 165 276	R765 314 831	R426 669 622



TOTAL FOREIGN DIRECT SPEND (TFDS) AND AVERAGE SPEND BY COUNTRY – PROVINCIAL DISTRIBUTION

APPENDIX

TOTAL FOREIGN DIRECT SPEND (TFDS) - PROVINCIAL DISTRIBUTION

	2024									
	Gauteng	Western Cape	Eastern Cape	KwaZulu- Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State	
Africa	R28 095 953 921	R3 876 583 911	R575 377 266	R1 858 918 134	R3 548 219 835	R2 137 625 311	R653 419 114	R159 082 771	R988 236 824	
Botswana	R541 008 662	R84 190 556	R17 410 903	R78 225 571	R23 069 504	R155 198 052	R159 572 558	R13 118 714	R13 282 550	
Lesotho	R636 176 047	R298 573 108	R71 083 103	R92 241 241	R16 402 911	R18 425 863	R102 464 341	R38 228 543	R845 086 949	
Malawi	R3 113 593 818	R116 458 708	R16 210 281	R88 886 632	R2 522 305	R17 482 096	R27 305 724	R3 018 050	R1 174 814	
Mozambique	R2 369 608 937	R74 600 885	R19 005 320	R55 354 265	R2 821 287 427	R55 276 624	R30 065 803	R1 693 247	R6 549 225	
Namibia	R389 238 239	R849 094 846	R50 499 106	R25 450 193	R10 856 543	R11 797 502	R26 522 428	R48 334 724	R10 126 955	
Swaziland	R360 060 248	R9 749 449	R23 543 347	R605 236 793	R284 052 272	R8 903 888	R14 816 991	R792 060	R2 394 798	
Zambia	R3 212 336 036	R130 966 550	R47 410 234	R138 664 268	R15 806 228	R33 556 883	R8 279 129	R328 140	R4 748 830	
Zimbabwe	R13 682 068 494	R1 076 979 213	R216 297 833	R491 291 200	R305 262 464	R1 800 659 445	R203 771 667	R42 113 784	R84 555 571	
Angola	R690 391 278	R171 176 417	R7 290 396	R25 281 183	R2 475 842	R5 174 952	R7 012 904	R2 107 218	R1 362 622	
Democratic Republic of Congo	R522 742 203	R70 852 827	R10 322 866	R20 767 362	R9 500 683	R3 662 863	R33 843 114	R2 202 110	R4 153 471	
Ethiopia	R84 464 787	R19 021 530	R4 892 846	R4 197 920	R1 632 446	R4 437 979	R803 243	RO	R365 070	
Ghana	R419 305 500	R211 579 851	R31 114 254	R31 697 641	R5 277 582	R1 289 543	R9 373 485	R2 322 571	R3 167 894	
Kenya	R475 094 740	R197 831 175	R10 705 985	R42 468 386	R8 018 324	R5 193 957	R6 891 155	R1 577 710	R6 094 508	
Nigeria	R277 452 601	R129 178 493	R7 957 979	R20 985 246	R6 244 574	R1 821 014	R3 241 514	R1 288 384	R1 271 487	
Tanzania	R353 346 262	R49 029 896	R9 126 929	R41 648 226	R6 994 796	R3 692 539	R5 977 410	RO	R552 015	
Uganda	R180 415 236	R25 291 240	R6 908 399	R15 118 243	R2 707 220	R349 636	R2 126 895	RO	R104 013	
Other Africa	R788 650 833	R362 009 166	R25 597 486	R81 403 765	R26 108 713	R10 702 476	R11 350 755	R1 957 516	R3 246 052	
Asia	R1 687 153 829	R876 328 627	R159 096 205	R582 988 026	R148 745 055	R69 012 203	R72 974 019	R45 431 164	R55 952 046	
China including Hong Kong	R485 587 925	R206 752 407	R51 474 100	R112 677 023	R27 959 092	R20 657 660	R15 442 529	R24 426 544	R27 785 517	
India	R624 377 791	R282 427 075	R38 381 853	R277 897 083	R32 793 248	R10 911 441	R31 089 950	R2 626 963	R3 249 900	
Japan	R140 639 063	R64 052 601	R21 735 122	R17 185 248	R13 682 430	R2 572 720	R5 986 536	R2 513 049	R1 870 106	
Malaysia	R42 315 768	R31 994 439	R2 655 479	R9 485 379	R27 325 130	R10 218 259	R1 784 835	RO	R123 669	
Singapore	R63 226 293	R90 709 281	R6 580 017	R5 502 584	R4 924 691	R3 561 836	R142 625	R261 780	R3 193 269	
South Korea	R100 710 965	R63 501 562	R10 930 575	R30 391 615	R18 503 180	R6 798 949	R7 935 410	R3 684 875	R13 207 789	
Other Asia	R230 296 025	R136 891 261	R27 339 057	R129 849 094	R23 557 284	R14 291 338	R10 592 134	R11 917 954	R6 521 795	
Australasia	R818 204 176	R828 070 359	R211 746 676	R279 534 039	R187 855 968	R137 220 231	R68 774 039	R34 553 959	R35 379 696	
Australia	R677 113 926	R696 101 832	R165 977 247	R235 217 393	R168 723 421	R120 572 026	R61 601 544	R33 905 522	R25 172 119	
New Zealand	R140 909 250	R131 879 148	R45 769 429	R44 272 578	R19 098 187	R16 648 205	R7 172 496	R648 437	R10 207 577	
Other Australasia	R181 000	R89 378	RO	R44 068	R34 361	RO	RO	RO	RO	
South America	R477 386 338	R587 007 880	R98 577 203	R51 493 167	R115 131 436	R83 194 712	R55 944 581	R8 356 704	R4 977 393	
Argentina	R36 699 484	R45 361 207	R7 918 708	R8 089 834	R7 870 607	R7 857 463	R3 382 768	RO	R3 693 391	
Brazil	R335 130 292	R450 718 768	R57 867 009	R72 185 954	R71 423 488	R56 211 895	R46 505 132	R2 006 200	R359 767	
Chile	R25 591 895	R28 428 719	R1 018 246	R2 806 143	R4 480 027	R5 939 185	R933 582	R985 704	RO	
Other Central & South America	R79 964 666	R62 499 187	R31 773 240	R13 411 236	R31 357 315	R13 186 169	R5 123 099	R5 364 800	R924 235	
Europe	R6 736 535 119	R13 111 193 195	R1 933 267 066	R1 718 308 661	R2 164 338 449	R1 517 020 467	R550 223 232	R357 667 600	R206 890 324	
Austria	R74 003 598	R255 448 585	R41 896 916	R32 322 498	R61 916 488	R59 403 256	R3 162 994	R1 448 220	R5 890 096	
Belgium	R191 577 277	R357 479 408	R44 804 942	R43 867 316	R83 740 908	R58 815 394	R18 563 046	R9 193 060	R5 360 341	
Denmark	R66 500 960	R124 813 747	R36 027 038	R24 291 203	R45 045 729	R85 052 504	R25 635 013	R130 638 427	R3 884 360	
Finland	R31 582 226	R91 840 029	R11 983 025	R3 448 671	R17 636 243	R10 865 479	R441 626	R368 096	R305 111	
France	R487 772 734	R1 227 958 869	R142 302 496	R151 923 534	R270 279 965	R119 171 112	R33 953 864	R4 200 747	R11 484 202	
Germany	R179 751 262	R2 542 406 079	R383 941 550	R246 842 189	R568 156 813	R316 764 239	R124 091 630	R21 401 407	R29 651 794	
Ireland	R162 144 168	R395 567 500	R63 964 449	R64 260 426	R42 592 774	R29 113 289	R14 319 092	R5 672 853	R5 745 989	
Italy	R235 013 876	R475 562 075	R69 813 339	R35 207 468	R78 638 508	R53 822 833	R8 185 733	R15 128 135	R2 875 065	
Netherlands	R592 629 755	R1 302 550 729	R220 529 475	R167 275 891	R290 870 258	R203 886 157	R38 125 092	R7 424 385	R31 602 793	
Norway	R100 171 749	R140 470 428	R28 211 592	R12 053 167	R23 377 906	R24 452 200	R3 895 210	R1 513 976	R400 991	
Portugal	R115 695 838	R149 845 051	R12 334 901	R16 481 363	R11 744 710	R8 060 019	R2 064 122	R2 290 950	R3 863 884	
Russian Fed	R426 501 687	R166 213 378	R19 059 266	R30 886 009	R15 602 067	R15 174 915	R10 634 252	R79 878 295	R15 917 991	
Spain	R178 455 907	R271 522 675	R31 113 957	R24 720 656	R59 162 965	R24 752 924	R19 956 841	R46 864 258	R3 891 188	
Sweden	R76 390 879	R250 412 196	R44 717 816	R25 536 070	R46 134 948	R33 300 349	R4 973 931	R2 593 464	R967 556	
Switzerland	R184 011 637	R616 847 521	R82 678 851	R79 946 672	R103 033 691	R113 445 741	R21 354 746	R3 235 067	R7 427 233	
Turkey	R133 192 764	R119 261 263	R4 033 040	R30 333 730	R11 267 292	R1 190 377	R970 386	R1 402 367	R2 347 173	
UK	R2 236 445 170	R4 304 749 439	R649 899 363	R689 295 092	R386 161 494	R324 794 507	R189 614 737	R19 832 680	R70 864 756	
Other Europe	R264 693 634	R318 244 224	R45 955 050	R39 616 706	R48 975 691	R34 955 172	R30 280 918	R4 581 213	R4 409 801	
Middle East	R393 960 252	R356 595 958	R45 323 752	R173 028 368	R68 841 643	R27 356 321	R22 707 932	R2 389 547	R16 249 587	
UAE	R57 519 235	R77 640 049	R2 142 815	R12 001 682	R9 036 635	R1 708 787	R592 860	R1 649 083	R190 542	
Other Middle East	R336 441 017	R278 955 909	R43 180 936	R161 026 686	R59 805 008	R25 647 535	R22 115 072	R740 463	R16 059 044	
North America	R3 128 459 681	R3 044 547 854	R1 151 157 639	R874 306 591	R932 227 160	R1 757 319 823	R611 263 979	R780 570 763	R243 710 411	
Canada	R300 984 960	R456 697 009	R72 737 182	R87 762 506	R69 860 430	R38 771 175	R17 625 218	R8 656 931	R14 989 402	
USA	R2 827 473 336	R2 587 845 306	R1 078 400 457	R786 544 085	R862 364 654	R1 718 548 648	R593 638 761	R771 913 832	R228 721 009	
TOTAL	R41 337 653 317	R22 680 327 782	R4 174 525 806	R5 538 576 987	R7 165 359 547	R5 728 749 067	R2 035 306 896	R1 388 052 506	R1 551 396 280	

APPENDIX

AVERAGE SPEND - PROVINCIAL DISTRIBUTION

	2024									
	Gauteng	Western Cape	Eastern Cape	KwaZulu- Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State	
Africa	R10 200	R11 900	R7 200	R4 000	R2 100	R4 700	R2 600	R3 100	R1 600	
Botswana	R3 000	R12 900	R3 500	R7 700	R2 800	R2 600	R1 400	R5 200	R6 000	
Lesotho	R3 000	R8 000	R6 000	R3 400	R2 100	R5 900	R2 000	R3 500	R1 500	
Malawi	R22 200	R9 800	R10 700	R12 400	R3 000	R10 100	R10 300	R35 000	R2 200	
Mozambique	R9 000	R8 100	R7 500	R8 600	R2 300	R3 600	R2 900	R7 300	R3 100	
Namibia	R9 300	R9 700	R9 700	R8 200	R7 100	R7 300	R3 800	R1 800	R3 800	
Swaziland	R1 800	R5 100	R8 600	R2 200	R800	R1 700	R1 500	R1 500	R2 300	
Zambia	R29 500	R13 400	R15 000	R4 700	R7 100	R19 800	R6 700	R6 000	R8 400	
Zimbabwe	R9 500	R10 000	R5 500	R5 300	R6 500	R4 900	R4 000	R4 900	R3 700	
Angola	R33 600	R20 900	R17 500	R22 300	R12 600	R15 000	R17 900	R11 600	R11 900	
Democratic Republic of Congo	R26 900	R19 600	R9 100	R14 800	R10 300	R10 900	R34 900	R10 500	R7 800	
Ethiopia	R19 600	R12 600	R10 500	R9 200	R9 500	R38 400	R9 300	R0	R15 100	
Ghana	R19 100	R26 500	R28 000	R19 200	R6 700	R7 000	R16 100	R18 200	R16 900	
Kenya	R16 400	R23 300	R8 800	R11 600	R7 000	R9 400	R9 000	R10 300	R8 900	
Nigeria	R18 400	R26 600	R14 000	R15 100	R12 700	R9 400	R7 300	R8 600	R8 100	
Tanzania	R20 600	R14 800	R11 800	R22 000	R10 300	R10 600	R15 400	R0	R7 100	
Uganda	R19 300	R15 400	R12 200	R13 000	R7 900	R1 400	R6 600	R0	R1 400	
Other Africa	R22 200	R26 500	R9 800	R15 900	R15 600	R10 000	R12 100	R8 500	R12 400	
Asia	R17 100	R14 800	R12 900	R22 200	R12 800	R12 300	R9 600	R26 500	R21 100	
China including Hong Kong	R19 500	R17 400	R18 300	R24 900	R12 600	R15 600	R14 200	R41 900	R27 400	
India	R17 200	R14 500	R10 200	R19 100	R8 300	R8 600	R7 300	R9 300	R14 200	
Japan	R14 700	R13 000	R17 900	R10 800	R11 900	R4 700	R16 400	R9 600	R5 400	
Malaysia	R12 800	R10 000	R5 000	R21 600	R41 800	R26 300	R5 000	R0	R1 300	
Singapore	R14 600	R18 000	R12 800	R9 000	R6 500	R5 400	R2 300	R3 100	R25 900	
South Korea	R16 800	R16 100	R11 800	R25 100	R22 300	R27 200	R12 300	R47 900	R28 800	
Other Asia	R16 100	R12 600	R10 800	R38 300	R11 300	R12 100	R12 600	R27 800	R16 900	
Australasia	R14 000	R16 000	R17 000	R17 000	R9 800	R17 000	R12 000	R25 100	R13 200	
Australia	R14 100	R16 200	R17 200	R17 400	R10 000	R18 200	R12 400	R28 700	R12 400	
New Zealand	R13 400	R14 900	R16 200	R14 900	R8 200	R11 400	R9 200	R3 300	R15 500	
Other Australasia	R12 900	R4 300	R0	R7 300	R1 700	R0	R0	R0	R0	
South America	R11 900	R16 900	R14 700	R11 700	R7 600	R14 900	R12 500	R32 600	R10 500	
Argentina	R11 700	R17 800	R15 600	R24 000	R8 200	R20 800	R5 100	R0	R19 300	
Brazil	R11 400	R16 700	R10 900	R9 000	R6 400	R13 500	R14 900	R20 000	R1 600	
Chile	R13 500	R19 800	R5 900	R9 400	R7 500	R17 300	R9 900	R16 400	R0	
Other Central & South America	R14 000	R16 900	R44 700	R18 100	R13 000	R18 200	R8 600	R56 000	R14 100	
Europe	R15 600	R19 900	R13 800	R14 300	R10 600	R18 200	R12 600	R28 100	R12 300	
Austria	R9 900	R20 500	R11 600	R14 200	R14 100	R26 600	R4 100	R6 400	R12 600	
Belgium	R11 100	R16 000	R9 200	R8 400	R9 200	R14 900	R10 200	R15 700	R8 600	
Denmark	R12 300	R14 200	R14 800	R20 600	R12 500	R30 200	R22 800	R228 800	R22 100	
Finland	R15 700	R23 600	R14 400	R9 800	R13 700	R19 100	R7 700	R6 200	R4 000	
France	R11 500	R18 200	R11 900	R10 200	R8 900	R13 600	R8 600	R6 600	R9 300	
Germany	R14 300	R18 100	R11 200	R10 900	R11 300	R16 100	R13 800	R12 200	R10 600	
Ireland	R17 000	R23 600	R14 400	R18 300	R13 000	R21 600	R15 400	R9 000	R9 900	
Italy	R12 800	R15 700	R13 500	R9 400	R6 300	R12 900	R6 800	R26 400	R10 500	
Netherlands	R15 800	R19 500	R13 700	R11 300	R11 900	R18 900	R10 100	R6 700	R12 000	
Norway	R29 100	R19 100	R18 100	R12 300	R13 600	R15 000	R13 700	R9 200	R1 700	
Portugal	R18 200	R21 800	R16 400	R18 000	R9 100	R14 500	R10 600	R18 700	R20 500	
Russian Fed	R28 200	R14 500	R9 500	R11 400	R4 600	R10 700	R8 800	R47 300	R50 100	
Spain	R14 800	R16 500	R13 600	R11 900	R8 200	R14 100	R14 400	R46 500	R23 500	
Sweden	R10 800	R17 000	R13 200	R9 300	R11 800	R14 600	R6 600	R7 700	R5 200	
Switzerland	R13 600	R23 200	R13 400	R22 000	R14 200	R39 000	R14 200	R5 300	R13 800	
Turkey	R20 900	R18 100	R7 300	R30 300	R10 000	R3 800	R2 900	R11 600	R7 500	
UK	R17 400	R23 500	R18 400	R20 000	R11 900	R20 200	R14 700	R9 900	R13 700	
Other Europe	R14 500	R19 200	R11 100	R12 700	R8 600	R14 300	R13 100	R8 400	R5 500	
Middle East	R19 800	R23 900	R25 000	R35 500	R34 000	R19 100	R16 100	R11 000	R26 700	
UAE	R17 600	R23 300	R18 400	R25 400	R27 800	R6 900	R12 800	R8 300	R9 400	
Other Middle East	R20 200	R24 100	R25 500	R36 600	R35 200	R21 700	R16 200	R38 300	R27 300	
North America	R16 100	R16 100	R37 400	R20 000	R11 900	R42 900	R33 300	R135 500	R27 900	
Canada	R12 800	R14 500	R11 800	R12 400	R6 200	R11 400	R8 800	R11 100	R12 200	
USA	R16 500	R16 500	R43 900	R21 400	R12 900	R45 800	R36 300	R154 900	R30 500	
TOTAL	R11 500	R17 000	R14 700	R8 100	R3 600	R9 500	R6 100	R19 100	R2 400	



**BEDNIGHTS, LENGTH OF
STAY & ACCOMMODATION
BEDNIGHTS**

APPENDIX

BED NIGHTS BY COUNTRY				
	2022	2023	2024	% YOY GROWTH
AFRICA	45 180 190	81 484 013	84 917 754	4.2%
Botswana	1 100 044	1 565 858	1 557 768	-0.5%
Lesotho	11 897 170	15 076 754	13 698 887	-9.1%
Malawi	1 481 808	1 797 642	2 315 368	28.8%
Mozambique	7 608 012	13 408 768	17 381 698	29.6%
Namibia	1 834 553	1 533 755	1 938 126	26.4%
eSwatini	3 535 086	7 249 527	8 704 346	20.1%
Zambia	1 271 586	1 544 393	1 698 284	10.0%
Zimbabwe	13 727 129	36 027 600	33 884 092	-5.9%
Angola	460 832	446 551	401 507	-10.1%
DRC	327 318	435 303	519 158	19.3%
Ethiopia	66 625	85 813	99 467	15.9%
Ghana	236 090	207 693	424 900	104.6%
Kenya	252 597	520 182	574 941	10.5%
Nigeria	250 867	285 526	341 277	19.5%
Tanzania	301 225	267 831	370 748	38.4%
Uganda	166 615	252 604	207 636	-17.8%
Other Africa	662 633	778 212	799 553	2.7%
ASIA	2 018 962	3 373 097	2 920 087	-13.4%
China including Hong Kong	195 866	710 743	633 952	-10.8%
India	981 814	1 331 309	1 071 541	-19.5%
Japan	84 955	194 693	234 272	20.3%
Malaysia	57 802	113 710	79 004	-30.5%
Singapore	53 575	65 933	91 600	38.9%
South Korea	103 631	188 153	204 834	8.9%
Other Asia	541 319	768 557	604 884	-21.3%
AUSTRALASIA	1 158 814	1 711 456	1 842 357	7.6%
Australia	921 330	1 362 893	1 468 868	7.8%
New Zealand	233 510	345 210	372 649	7.9%
Other Australia	3 974	3 353	840	-75.0%
CENTRAL & SOUTH AMERICA	422 240	634 929	1 029 993	62.2%
Argentina	41 638	69 914	93 798	34.2%
Brazil	227 836	376 696	687 274	82.4%
Chile	16 526	27 473	54 699	99.1%
Other Central & South America	136 241	160 846	194 223	20.8%
EUROPE	15 165 605	17 937 481	16 943 426	-5.5%
Austria	263 259	310 361	317 039	2.2%
Belgium	612 220	670 073	645 282	-3.7%
Denmark	245 288	274 781	267 264	-2.7%
Finland	89 196	101 196	67 360	-33.4%
France	1 371 509	1 771 340	1 668 351	-5.8%
Germany	3 037 164	3 738 266	3 492 632	-6.6%
Ireland	319 162	385 211	473 645	23.0%
Italy	533 738	649 135	667 688	2.9%
The Netherlands	1 609 735	1 832 428	1 753 762	-4.3%
Norway	155 698	215 332	181 238	-15.8%
Portugal	188 572	189 040	164 735	-12.9%
Russian Federation	276 773	479 395	424 585	-11.4%
Spain	374 237	404 602	465 207	15.0%
Sweden	299 964	369 775	363 197	-1.8%
Switzerland	555 475	659 913	544 981	-17.4%
Turkey	147 924	179 925	201 211	11.8%
UK	4 525 355	5 093 895	4 729 262	-7.2%
Other Europe	560 337	612 814	515 988	-15.8%
MIDDLE EAST	725 583	1 108 362	713 218	-35.7%
United Arab Emirates	64 071	108 677	78 727	-27.6%
Other Middle East	661 511	999 685	634 492	-36.5%
NORTH AMERICA	4 796 232	5 528 290	6 255 765	13.2%
Canada	642 929	786 039	786 591	0.1%
USA	4 153 261	4 742 175	5 469 161	15.3%
Other North America	43	75	13	-82.7%
TOTAL	69 467 626	111 777 628	114 622 600	2.5%

APPENDIX

AVERAGE LENGTH OF STAY BY COUNTRY				
	2022	2023	2024	% YOY GROWTH
AFRICA	10.7	12.8	12.7	-1.2%
Botswana	4.2	4.3	3.9	-8.8%
Lesotho	14.2	13.0	14.1	8.6%
Malawi	13.0	12.9	14.1	9.3%
Mozambique	8.1	10.0	10.9	9.2%
Namibia	13.4	9.6	11.8	22.9%
eSwatini	8.8	9.9	10.3	4.6%
Zambia	11.0	10.6	11.0	3.1%
Zimbabwe	11.1	17.1	15.5	-9.2%
Angola	16.4	13.8	13.5	-2.2%
DRC	21.5	21.5	20.1	-6.8%
Ethiopia	15.5	14.8	15.0	1.3%
Ghana	17.0	15.2	13.5	-11.1%
Kenya	12.8	13.7	14.1	2.7%
Nigeria	17.8	17.4	16.6	-4.4%
Tanzania	18.6	13.1	16.8	28.3%
Uganda	19.4	21.2	17.4	-18.3%
Other Africa	18.2	15.0	14.6	-2.7%
ASIA	21.8	20.2	16.7	-17.4%
China including Hong Kong	21.3	20.8	16.3	-21.4%
India	20.9	19.3	16.5	-14.7%
Japan	16.3	15.5	15.1	-2.9%
Malaysia	22.5	22.2	12.7	-42.5%
Singapore	19.3	9.2	10.1	8.9%
South Korea	24.6	20.1	18.2	-9.4%
Other Asia	24.8	25.9	20.9	-19.5%
AUSTRALASIA	18.4	16.9	16.5	-2.4%
Australia	17.7	16.5	15.8	-3.8%
New Zealand	21.4	18.7	19.6	5.2%
Other Australia	27.0	26.2	14.0	-46.6%
CENTRAL & SOUTH AMERICA	18.5	16.8	15.7	-6.7%
Argentina	18.8	19.3	18.3	-5.3%
Brazil	17.9	16.1	14.5	-9.9%
Chile	16.0	13.3	18.2	36.3%
Other Central & South America	19.8	18.6	19.3	3.8%
EUROPE	18.2	15.9	14.9	-6.4%
Austria	19.9	16.1	16.3	1.3%
Belgium	19.5	16.5	16.2	-2.1%
Denmark	17.9	16.0	15.7	-2.2%
Finland	21.6	16.4	11.6	-29.3%
France	19.8	16.8	15.1	-10.2%
Germany	18.8	16.8	15.2	-9.4%
Ireland	16.0	15.9	17.5	9.6%
Italy	17.8	13.4	14.3	6.7%
The Netherlands	19.9	16.3	15.4	-5.5%
Norway	18.5	17.4	16.1	-7.5%
Portugal	18.9	14.7	12.3	-16.3%
Russian Federation	18.1	17.9	14.7	-18.2%
Spain	17.7	14.1	16.5	17.7%
Sweden	18.1	15.8	15.5	-2.0%
Switzerland	17.8	16.8	14.0	-16.9%
Turkey	18.5	15.2	15.0	-0.7%
Uk	16.6	14.9	14.1	-5.5%
Other Europe	21.9	16.8	13.9	-17.0%
MIDDLE EAST	20.3	22.8	18.5	-18.9%
United Arab Emirates	20.9	16.9	11.7	-30.7%
Other Middle East	20.2	23.7	19.9	-16.0%
NORTH AMERICA	16.9	15.5	15.4	-0.8%
Canada	19.2	15.4	14.8	-4.0%
USA	16.6	15.6	15.5	-0.4%
Other North America	10.8	18.8	13.0	-30.7%
TOTAL	12.6	13.6	13.3	-2.8%

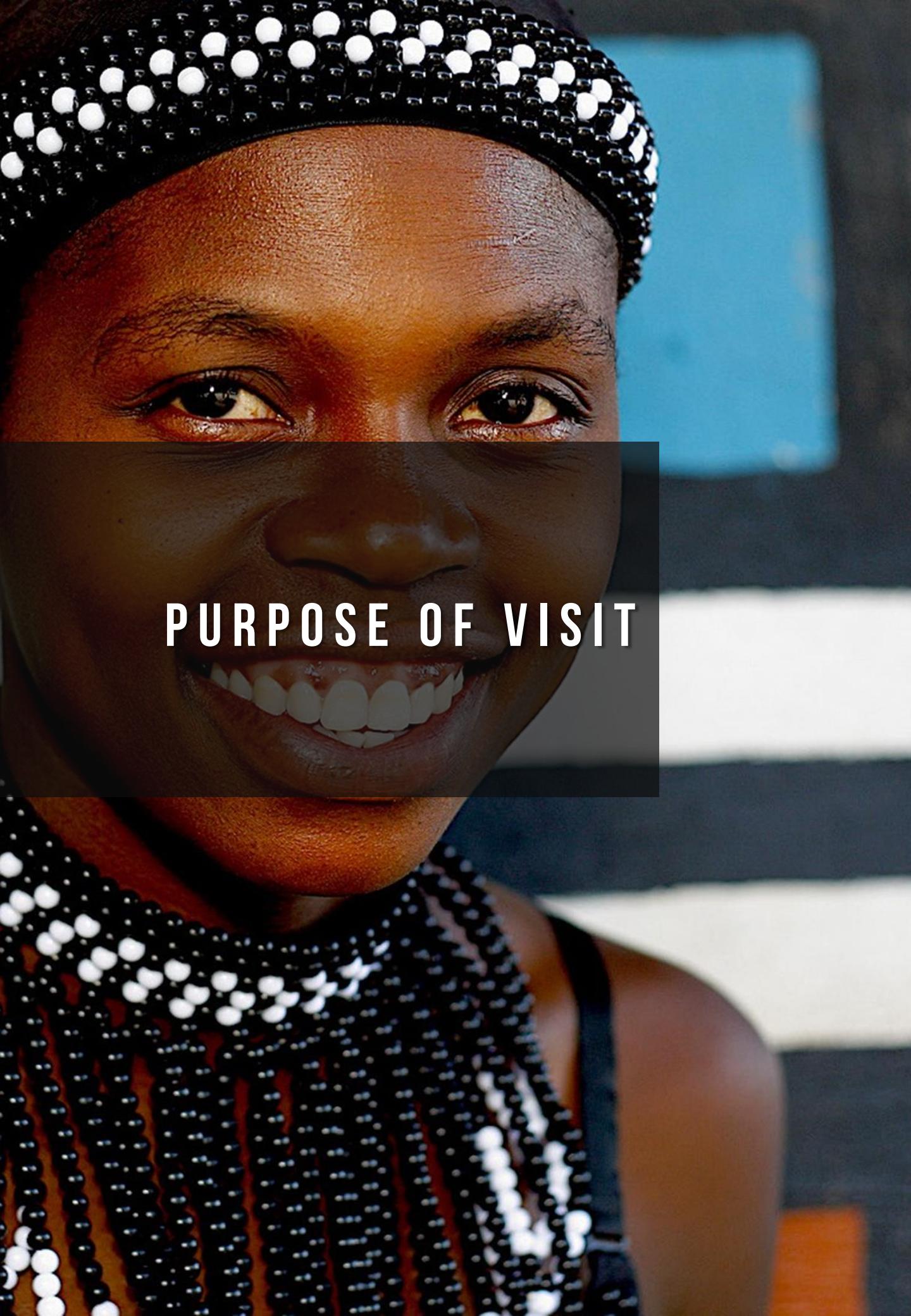
APPENDIX

ACCOMMODATION TYPE - BED NIGHTS 2024									
	Hotels	Guest House	BnB	Self-Catering	Game Lodge	Backpacker	Camping	Friends & Family	Air B&B
AFRICA	3 505 995	1 169 391	432 543	1 483 022	314 099	713 326	32 012	70 615 056	244 081
Botswana	145 769	95 436	8 471	27 183	22 671	10 379	1 270	840 148	3 288
Lesotho	77 022	92 740	9 052	471 356	10 970	554 214	9 491	10 820 880	163
Malawi	352 148	50 471	4 544	13 538	18 886	8 641	0	1 557 929	28 256
Mozambique	351 752	89 555	19 585	83 051	3 930	54 589	0	16 686 789	1 242
Namibia	180 167	186 226	76 534	107 159	13 944	7 709	10 758	804 861	4 906
eSwatini	160 954	101 377	44 166	5 464	35 519	48 088	4 863	8 002 971	18 405
Zambia	306 273	36 794	18 253	45 033	28 621	0	211	845 779	11 988
Zimbabwe	1 099 437	315 088	188 007	342 904	154 759	221	4 428	29 619 533	103 857
Angola	88 513	40 057	10 638	45 970	780	1 032	0	126 411	3 941
DRC	71 739	11 374	7 198	58 640	1 124	232	254	233 303	2 393
Ethiopia	19 820	4 957	454	3 409	409	0	0	47 925	2 115
Ghana	118 436	22 850	5 920	76 227	2 507	0	0	133 720	10 244
Kenya	165 003	19 514	12 974	28 896	3 283	724	642	184 819	8 795
Nigeria	77 544	19 011	4 536	41 140	2 258	512	0	138 333	18 348
Tanzania	80 471	26 048	12 341	37 705	1 726	0	0	134 169	5 691
Uganda	52 996	2 992	774	26 118	401	0	0	93 035	6 291
Other Africa	157 951	54 900	9 097	69 227	12 311	26 984	97	344 450	14 156
ASIA	752 300	200 575	38 711	287 318	56 870	7 029	2 533	1 251 859	24 379
China including Hong Kong	181 660	21 368	8 844	49 112	18 537	2 669	355	317 683	4 904
India	326 429	108 182	20 880	147 939	15 358	2 789	1 840	299 864	10 609
Japan	55 474	10 570	2 855	15 068	5 391	341	76	102 965	3 165
Malaysia	26 707	5 963	1 161	7 900	4 128	0	0	27 267	327
Singapore	37 681	9 612	148	1 502	5 099	0	0	37 065	492
South Korea	28 929	8 825	1 377	5 313	4 393	27	262	150 040	1 839
Other Asia	95 421	36 055	3 447	60 485	3 965	1 202	0	316 975	3 043
AUSTRALASIA	286 674	62 562	53 243	49 953	148 870	15 276	15 593	1 109 125	42 441
Australia	249 127	53 866	45 513	39 038	129 400	8 691	14 518	839 626	35 201
New Zealand	37 463	8 696	7 730	10 915	19 198	6 586	1 075	269 018	7 240
Other Australia	85	0	0	0	273	0	0	482	0
CENTRAL & SOUTH AMERICA	337 648	52 526	10 929	79 892	85 791	35 317	6 813	286 886	79 413
Argentina	27 698	1 417	3 132	10 517	6 745	1 997	505	31 372	896
Brazil	246 781	41 291	5 711	57 130	56 059	22 302	4 934	152 224	67 952
Chile	19 792	4 582	748	1 642	5 283	2 122	218	9 622	6 957
Other Central & South America	43 377	5 235	1 338	10 603	17 704	8 896	1 156	93 669	3 608
EUROPE	4 068 952	1 789 747	701 284	1 434 015	1 794 129	255 747	234 197	5 480 446	277 093
Austria	91 094	32 058	8 799	31 944	38 911	3 321	3 331	58 316	11 218
Belgium	147 692	99 749	27 265	49 741	99 995	7 008	15 640	142 614	16 968
Denmark	66 642	30 495	10 607	13 259	62 158	666	12 130	52 968	3 435
Finland	26 156	5 537	3 502	6 157	11 438	1 303	0	10 896	485
France	427 189	185 977	88 526	196 771	229 236	16 881	24 212	346 781	26 422
Germany	874 366	470 069	164 946	231 283	462 613	103 298	59 015	856 741	60 677
Ireland	102 507	22 091	10 780	45 496	27 321	5 647	2 964	244 976	2 140
Italy	219 365	96 211	21 736	55 213	68 502	4 483	3 023	161 830	3 669
The Netherlands	369 317	202 283	73 616	186 010	246 619	27 260	36 467	487 302	25 933
Norway	41 978	17 367	10 571	15 472	24 067	8 664	626	43 947	4 719
Portugal	42 226	20 024	5 980	14 555	7 264	1 123	614	63 156	3 529
Russian Federation	159 892	39 230	12 527	62 250	20 117	1 878	8 570	72 097	7 136
Spain	111 838	46 307	12 697	44 735	37 055	4 970	4 218	137 444	7 268
Sweden	88 173	34 898	19 845	58 309	49 696	6 865	3 515	64 304	12 465
Switzerland	153 057	67 349	31 081	62 117	70 196	12 503	9 349	106 725	4 793
Turkey	49 806	12 347	2 294	9 805	3 454	1 739	226	105 982	8 632
Ku	966 173	347 293	172 626	316 849	299 533	40 328	39 280	2 340 135	63 174
Other Europe	131 482	60 462	23 882	34 051	35 953	7 808	11 016	184 230	14 430
MIDDLE EAST	95 553	20 111	3 151	86 624	13 342	0	2 354	471 592	3 846
United Arab Emirates	19 083	370	0	3 086	787	0	989	53 172	152
Other Middle East	76 471	19 741	3 151	83 539	12 554	0	1 365	418 421	3 693
NORTH AMERICA	1 428 638	386 925	153 438	338 585	780 112	57 627	53 763	2 585 793	131 115
Canada	192 842	65 689	24 528	33 325	84 684	10 618	8 879	330 195	11 631
USA	1 235 786	321 235	128 910	305 260	695 425	47 009	44 885	2 255 599	119 484
Other North America	10	0	0	0	3	0	0	0	0
TOTAL	10 475 761	3 681 837	1 393 298	3 759 410	3 193 213	1 084 322	347 266	81 800 757	802 367

APPENDIX

	ACCOMMODATION BEDNIGHTS BY PROVINCE								
	2024								
	Gauteng	Western Cape	Eastern Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Hotels	4 769 372	3 968 059	297 060	704 950	404 591	109 913	146 557	42 871	32 389
Guest house	880 585	1 774 030	169 128	242 002	218 953	113 498	114 825	67 287	101 529
Bed & Breakfast	357 434	686 454	88 990	122 923	59 440	33 615	15 300	15 378	13 763
Game Lodges	156 315	164 427	247 212	255 789	1 344 387	778 055	157 853	50 813	38 362
Self Catering Units	942 811	1 820 838	223 814	200 587	88 051	76 398	104 431	24 314	278 167
Friends/Family	37 667 196	6 390 911	2 090 323	4 612 253	18 375 315	2 529 632	2 747 885	473 084	6 914 158
Backpacker hostels	87 843	212 854	57 880	74 327	80 070	54 828	61 367	196	454 958
Camping/caravanning	13 362	31 263	27 337	42 205	132 902	72 728	9 523	10 245	7 700
Hospital	12 556	5 012	147	1 661	1 060	6 314	3 986	122	9 193
Train/Ship etc	2 434	53 872	28 779	22 714	486	71	0	96	0
AirBnB	211 106	445 649	34 540	82 368	19 781	4 663	1 001	827	2 433
Couch	647	88	0	0	0	895	0	0	329
Other	3 078 468	1 480 922	461 195	652 230	210 697	448 084	298 810	36 759	1 266 740

	ACCOMMODATION LENGTH OF STAY BY PROVINCE								
	2024								
	Gauteng	Western Cape	Eastern Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Hotels	3.3	5.7	4.1	1.7	0.5	1.3	1.0	1.0	0.1
Guest house	1.4	6.2	3.9	0.7	0.3	1.5	0.9	1.6	0.2
Bed & Breakfast	0.6	4.2	3.3	0.4	0.1	0.5	0.1	0.4	0.0
Game Lodges	0.3	1.3	4.2	0.7	1.3	4.9	1.0	1.2	0.1
Self Catering Units	1.7	9.8	10.2	0.6	0.2	1.2	0.8	0.7	0.5
Friends/Family	15.9	15.7	17.3	10.0	10.8	10.5	12.0	9.0	10.2
Backpacker hostels	0.2	2.0	3.6	0.2	0.1	0.9	0.5	0.0	0.9
Camping/caravanning	0.0	0.3	2.0	0.1	0.2	1.1	0.1	0.3	0.0
Hospital	0.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Train/Ship etc	0.0	0.5	2.0	0.1	0.0	0.0	0.0	0.0	0.0
AirBnB	10.1	11.6	8.2	8.9	8.0	22.4	4.9	3.7	7.2
Couch	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	4.5	13.3	27.5	1.9	0.3	1.7	2.0	1.0	2.5



PURPOSE OF VISIT

APPENDIX

PURPOSE OF VISIT (CATEGORIES)

2024

	Holiday	Shopping personal	Shopping business	Business traveller	MICE	Medical	VFR	Religion	Other
AFRICA	8.9%	6.5%	8.8%	4.4%	2.8%	1.5%	60.5%	1.3%	5.6%
Botswana	16.8%	2.4%	11.7%	28.9%	4.1%	1.0%	26.4%	3.9%	4.7%
Lesotho	1.2%	0.8%	1.6%	0.1%	0.5%	1.3%	81.5%	1.2%	11.7%
Malawi	6.5%	2.6%	39.2%	7.4%	3.9%	0.9%	33.3%	1.5%	4.9%
Mozambique	11.1%	9.3%	3.2%	0.5%	0.6%	1.4%	72.6%	0.1%	1.1%
Namibia	22.9%	1.0%	3.7%	10.1%	10.3%	2.4%	34.2%	2.3%	13.2%
Eswatini	10.0%	0.4%	5.6%	0.6%	1.0%	0.7%	74.1%	1.1%	6.4%
Zambia	8.2%	2.4%	35.4%	12.9%	7.2%	0.7%	23.0%	2.2%	7.9%
Zimbabwe	6.7%	11.6%	13.8%	4.2%	3.0%	1.7%	53.7%	1.5%	3.7%
Angola	23.4%	2.0%	1.2%	9.2%	9.5%	14.0%	21.6%	0.8%	18.2%
DRC	14.8%	0.7%	1.2%	9.7%	11.8%	4.3%	37.9%	1.1%	18.5%
Ethiopia	11.9%	0.6%	0.0%	11.4%	24.3%	2.2%	32.6%	1.2%	15.7%
Ghana	30.7%	0.0%	1.1%	6.8%	17.7%	1.4%	19.4%	1.0%	21.7%
Kenya	16.4%	0.7%	0.0%	10.1%	26.6%	0.7%	20.9%	0.6%	24.0%
Nigeria	19.2%	0.4%	0.1%	9.8%	24.4%	1.3%	24.6%	1.8%	18.3%
Tanzania	18.7%	0.6%	1.7%	8.7%	19.3%	1.3%	28.3%	0.8%	20.6%
Uganda	13.5%	0.6%	0.3%	8.9%	26.3%	3.8%	20.5%	3.3%	22.7%
Other Africa	16.8%	0.5%	0.9%	16.0%	20.4%	1.2%	27.0%	1.3%	15.8%
ASIA	20.2%	0.1%	0.0%	22.3%	20.6%	0.2%	28.0%	0.4%	8.1%
China including Hong Kong	14.7%	0.1%	0.1%	22.5%	25.8%	0.1%	32.2%	0.1%	4.3%
India	19.0%	0.2%	0.0%	30.1%	20.2%	0.1%	19.0%	0.6%	10.7%
Japan	20.1%	0.0%	0.0%	11.9%	27.1%	0.3%	33.0%	0.4%	7.0%
Malaysia	33.4%	0.0%	0.0%	17.7%	17.8%	0.0%	22.1%	0.0%	9.0%
Singapore	33.3%	0.0%	0.0%	18.2%	22.9%	1.6%	18.3%	0.8%	4.8%
South Korea	21.2%	0.0%	0.0%	5.8%	13.5%	0.0%	53.4%	0.0%	6.2%
Other Asia	23.2%	0.0%	0.0%	18.8%	13.8%	0.2%	34.1%	0.3%	9.5%
AUSTRALASIA	35.3%	0.1%	0.0%	3.2%	4.8%	0.2%	51.2%	0.2%	5.1%
Australia	36.9%	0.1%	0.0%	3.3%	4.9%	0.1%	49.6%	0.2%	4.9%
New Zealand	27.4%	0.0%	0.0%	2.7%	4.5%	0.3%	58.8%	0.0%	6.2%
Other Australasia	32.5%	0.0%	0.0%	0.0%	5.0%	0.0%	52.5%	10.0%	0.0%
CENTRAL & SOUTH AMERICA	51.4%	0.0%	0.0%	8.6%	12.9%	0.0%	13.2%	2.1%	11.8%
Argentina	49.1%	0.0%	0.0%	8.6%	15.9%	0.0%	18.4%	0.7%	7.3%
Brazil	53.9%	0.0%	0.0%	8.8%	11.2%	0.0%	10.1%	2.2%	13.7%
Chile	49.5%	0.0%	0.0%	9.4%	18.3%	0.0%	11.5%	2.4%	8.9%
Other Central & South America	41.3%	0.0%	0.0%	7.0%	17.7%	0.2%	25.8%	1.8%	6.2%
EUROPE	48.5%	0.1%	0.0%	11.6%	9.0%	0.2%	25.3%	0.2%	5.1%
Austria	60.0%	0.0%	0.0%	7.7%	10.8%	0.2%	14.6%	0.4%	6.3%
Belgium	55.2%	0.0%	0.0%	9.9%	8.9%	0.0%	19.7%	0.2%	6.1%
Denmark	65.2%	0.0%	0.0%	7.5%	9.0%	0.4%	12.9%	0.3%	4.8%
Finland	58.4%	0.0%	0.0%	13.4%	9.8%	0.0%	13.1%	0.0%	5.3%
France	59.1%	0.1%	0.0%	10.5%	8.4%	0.3%	16.0%	0.1%	5.6%
Germany	54.8%	0.1%	0.0%	12.1%	9.0%	0.1%	18.7%	0.2%	5.0%
Ireland	44.0%	0.3%	0.0%	7.4%	6.2%	0.3%	37.6%	1.2%	3.0%
Italy	57.8%	0.0%	0.3%	12.6%	11.5%	0.0%	14.3%	0.2%	3.2%
The Netherlands	52.2%	0.0%	0.0%	11.3%	6.7%	0.2%	24.9%	0.3%	4.4%
Norway	55.4%	0.0%	0.0%	12.2%	7.2%	0.2%	15.5%	0.0%	9.6%
Portugal	33.3%	0.9%	0.0%	17.5%	18.0%	0.7%	26.2%	0.3%	3.2%
Russian Federation	38.2%	0.0%	0.0%	30.5%	13.9%	0.0%	11.4%	0.2%	5.8%
Spain	52.5%	0.0%	0.0%	13.9%	10.8%	0.3%	15.8%	0.0%	6.7%
Sweden	54.4%	0.0%	0.0%	9.7%	11.4%	0.0%	14.6%	0.7%	9.2%
Switzerland	59.0%	0.2%	0.0%	8.2%	9.1%	0.0%	18.5%	0.0%	5.0%
Turkey	28.8%	0.0%	0.0%	31.6%	17.7%	0.0%	15.9%	0.0%	6.0%
Uk	37.3%	0.1%	0.0%	9.2%	7.6%	0.2%	40.4%	0.2%	4.9%
Other Europe	36.9%	0.3%	0.0%	21.0%	14.8%	0.2%	22.2%	0.1%	4.5%
MIDDLE EAST	24.9%	0.1%	0.0%	5.7%	7.8%	0.1%	54.1%	0.3%	7.0%
United Arab Emirates	24.8%	0.0%	0.0%	5.7%	7.4%	0.0%	49.8%	0.2%	12.0%
Other Middle East	24.9%	0.1%	0.0%	5.7%	7.9%	0.1%	55.0%	0.4%	5.9%
NORTH AMERICA	52.5%	0.0%	0.0%	8.8%	7.5%	0.2%	23.9%	1.2%	5.8%
Canada	55.6%	0.0%	0.0%	3.9%	7.8%	0.0%	29.2%	0.2%	3.4%
USA	52.0%	0.0%	0.0%	9.5%	7.5%	0.2%	23.1%	1.4%	6.2%
Other North America	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	17.1%	5.0%	6.8%	5.9%	4.3%	1.2%	53.0%	1.1%	5.6%



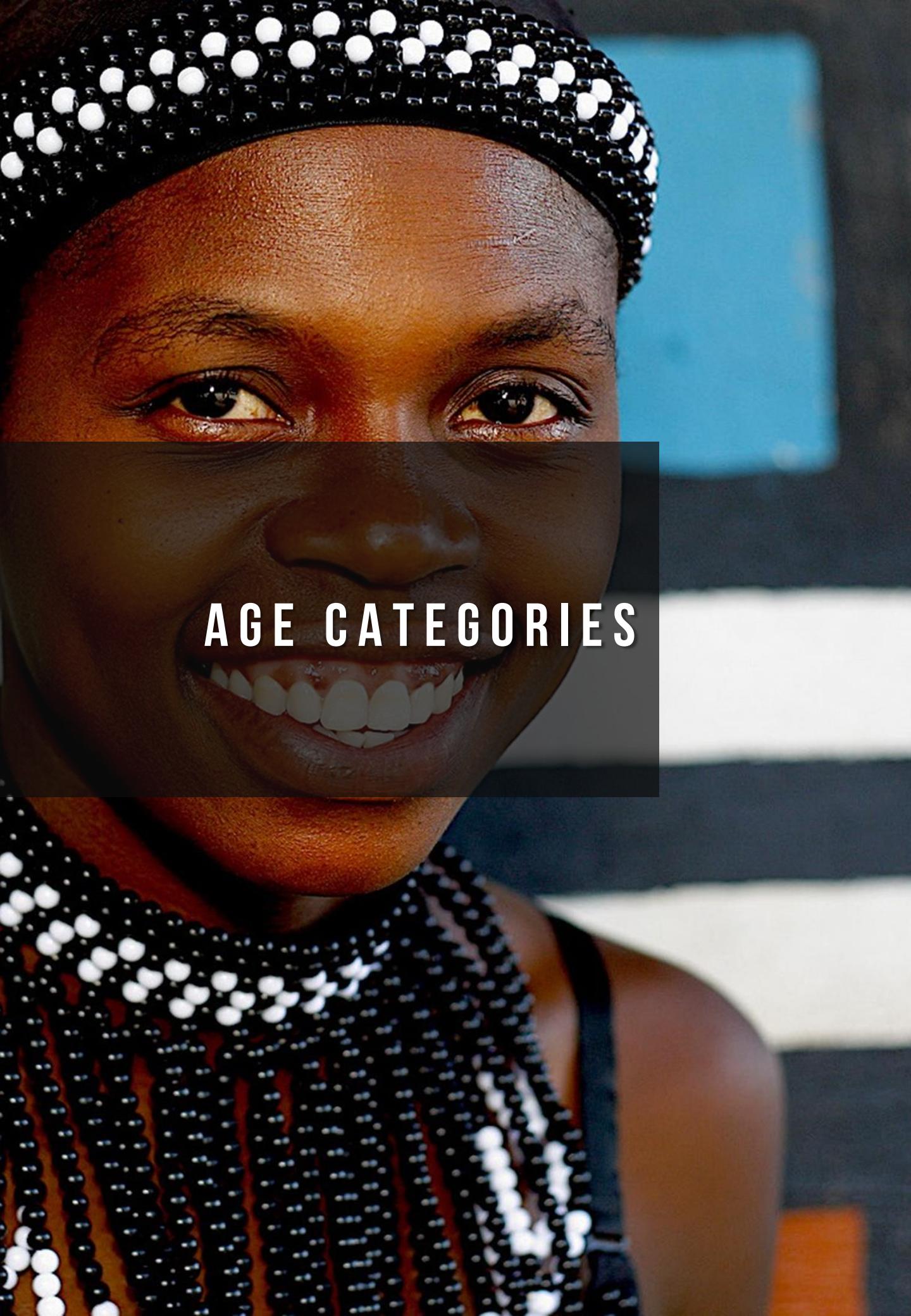
REPEAT RATE

APPENDIX

REPEAT VISITS BY COUNTRY

2024

	First timers	2 - 3 times	4 - 5 times	6 - 9 times	10 times or more
Africa	7.9%	13.0%	9.1%	9.5%	32.2%
Botswana	6.8%	6.4%	4.7%	5.5%	41.4%
Lesotho	0.9%	3.3%	2.4%	2.2%	14.5%
Malawi	11.4%	14.5%	9.4%	9.5%	51.5%
Mozambique	11.7%	18.1%	7.6%	6.3%	8.2%
Namibia	4.2%	7.3%	7.3%	14.4%	66.3%
Swaziland	1.5%	9.7%	12.0%	15.7%	38.7%
Zambia	13.8%	13.4%	10.0%	9.2%	46.9%
Zimbabwe	7.5%	15.8%	12.3%	12.7%	49.9%
Angola	19.4%	15.6%	10.5%	16.4%	38.2%
Democratic Republic of Congo	23.2%	15.1%	15.2%	13.4%	33.1%
Ethiopia	34.0%	18.6%	20.5%	15.8%	11.1%
Ghana	55.0%	17.2%	12.6%	6.4%	8.8%
Kenya	39.9%	19.1%	10.9%	15.2%	14.9%
Nigeria	40.4%	19.3%	12.9%	14.1%	13.4%
Tanzania	30.1%	19.8%	13.1%	14.0%	23.0%
Uganda	39.0%	17.0%	9.5%	12.5%	22.0%
Other Africa	31.3%	20.3%	17.2%	16.8%	14.3%
Asia	47.4%	21.2%	11.8%	11.2%	8.4%
China including Hong Kong	38.1%	20.4%	12.3%	18.8%	10.5%
India	51.9%	21.9%	12.5%	8.1%	5.6%
Japan	41.9%	25.5%	11.3%	11.1%	10.1%
Malaysia	54.9%	22.7%	6.3%	6.8%	9.3%
Singapore	50.0%	18.3%	11.7%	10.3%	9.7%
South Korea	38.8%	25.0%	15.3%	11.8%	9.2%
Other Asia	53.7%	17.4%	9.4%	9.3%	10.2%
Australasia	36.7%	21.4%	13.7%	15.9%	12.4%
Australia	37.5%	20.8%	13.1%	15.9%	12.7%
New Zealand	32.5%	24.3%	16.5%	16.0%	10.8%
Other Australasia	45.8%	1.7%	0.0%	8.3%	44.2%
South America	70.5%	14.3%	6.6%	4.0%	4.6%
Argentina	65.9%	16.7%	9.8%	2.5%	5.0%
Brazil	72.8%	13.1%	6.2%	3.4%	4.5%
Chile	69.0%	17.8%	5.8%	3.9%	3.6%
Other Central & South America	62.0%	18.0%	7.1%	8.0%	4.9%
Europe	48.6%	21.8%	11.2%	9.7%	8.7%
Austria	59.2%	19.6%	9.4%	5.6%	6.2%
Belgium	55.6%	22.5%	9.0%	7.4%	5.6%
Denmark	56.5%	26.2%	7.5%	3.8%	6.1%
Finland	61.7%	21.1%	5.2%	6.0%	5.9%
France	60.7%	20.9%	9.1%	5.4%	3.9%
Germany	49.6%	23.1%	11.1%	8.9%	7.3%
Ireland	48.4%	21.6%	10.5%	7.3%	12.2%
Italy	60.3%	20.8%	9.0%	5.7%	4.3%
Netherlands	51.3%	23.9%	10.9%	6.9%	7.0%
Norway	65.6%	17.0%	5.2%	6.1%	6.2%
Portugal	39.0%	23.1%	11.8%	12.4%	13.7%
Russian Fed	49.8%	20.9%	14.1%	10.8%	4.5%
Spain	60.5%	17.3%	9.0%	7.7%	5.5%
Sweden	57.4%	21.5%	8.7%	6.4%	6.1%
Switzerland	56.2%	21.7%	7.5%	7.4%	7.2%
Turkey	48.5%	23.0%	16.6%	9.4%	2.6%
UK	36.8%	20.7%	13.4%	15.0%	14.1%
Other Europe	45.7%	26.1%	14.2%	7.4%	6.5%
Middle East	41.9%	13.4%	9.2%	16.2%	19.3%
UAE	51.2%	9.4%	5.6%	24.8%	9.0%
Other Middle East	39.9%	14.3%	9.9%	14.4%	21.5%
North America	56.4%	19.8%	8.6%	8.0%	7.1%
Canada	57.5%	20.4%	7.3%	6.8%	8.0%
USA	56.2%	19.7%	8.9%	8.2%	7.0%
Other North America	100.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	17.3%	14.8%	9.4%	9.6%	27.0%



AGE CATEGORIES

APPENDIX

AGE CATEGORIES							
2024							
	18 - 24 years	25 - 30 years	31 - 34 years	35 - 40 years	41 - 50 years	51 - 60 years	60+ years
AFRICA	15.5%	21.1%	17.3%	19.9%	18.6%	5.2%	2.4%
Botswana	3.7%	11.9%	18.7%	28.6%	26.3%	8.0%	2.8%
Lesotho	26.1%	28.5%	16.7%	14.7%	9.6%	3.5%	0.9%
Malawi	2.7%	14.0%	19.7%	25.0%	29.9%	6.0%	2.7%
Mozambique	21.2%	25.3%	16.1%	17.1%	16.9%	2.8%	0.6%
Namibia	8.0%	10.8%	12.1%	18.0%	21.3%	14.9%	14.9%
eSwatini	27.1%	29.4%	18.4%	14.5%	9.1%	1.3%	0.3%
Zambia	4.8%	11.4%	18.7%	26.5%	30.0%	6.9%	1.5%
Zimbabwe	7.5%	15.7%	17.3%	23.6%	24.2%	7.7%	4.1%
Angola	4.8%	13.8%	19.2%	25.5%	24.7%	8.0%	3.9%
DRC	8.2%	15.1%	15.0%	23.5%	25.1%	10.3%	2.7%
Ethiopia	5.6%	14.4%	18.8%	29.7%	19.4%	7.2%	5.0%
Ghana	6.0%	24.3%	25.1%	24.3%	15.6%	3.1%	1.6%
Kenya	7.3%	17.1%	21.7%	28.2%	16.0%	7.7%	2.0%
Nigeria	6.1%	17.5%	23.5%	22.3%	20.5%	6.8%	3.3%
Tanzania	9.3%	17.3%	25.0%	19.3%	21.0%	6.3%	1.7%
Uganda	8.0%	19.1%	20.4%	21.3%	17.6%	10.6%	3.0%
Other Africa	6.3%	14.3%	21.3%	25.4%	22.1%	6.9%	3.8%
ASIA	6.6%	20.0%	21.1%	21.5%	20.3%	6.8%	3.6%
China including Hong Kong	5.4%	21.3%	23.8%	27.1%	15.5%	4.8%	2.2%
India	6.1%	17.3%	20.3%	21.5%	24.0%	7.8%	2.9%
Japan	9.0%	20.6%	15.9%	21.8%	18.7%	8.4%	5.7%
Malaysia	8.1%	18.5%	17.6%	16.3%	25.9%	7.7%	5.8%
Singapore	4.2%	16.3%	13.2%	14.9%	30.3%	7.8%	13.2%
South Korea	13.4%	29.4%	25.5%	12.4%	11.6%	4.4%	3.4%
Other Asia	6.1%	21.6%	23.8%	20.3%	18.6%	6.9%	2.6%
AUSTRALASIA	6.5%	11.7%	13.7%	14.4%	24.1%	14.5%	15.0%
Australia	6.7%	10.7%	13.7%	14.5%	24.7%	14.4%	15.4%
New Zealand	5.5%	16.6%	14.2%	13.8%	21.6%	15.3%	12.8%
Other Australia	32.5%	35.8%	8.3%	1.7%	11.7%	0.0%	10.0%
CENTRAL & SOUTH AMERICA	8.3%	18.3%	25.9%	18.4%	16.3%	7.6%	5.2%
Argentina	8.6%	17.3%	23.7%	16.4%	18.4%	8.9%	6.7%
Brazil	8.8%	18.1%	27.5%	18.3%	15.5%	6.9%	4.9%
Chile	8.7%	22.7%	20.5%	20.6%	12.8%	6.2%	8.5%
Other Central & South America	5.3%	18.3%	21.0%	19.4%	20.1%	10.9%	5.0%
EUROPE	6.2%	14.6%	15.4%	18.4%	25.0%	11.6%	8.8%
Austria	8.2%	21.4%	18.9%	17.2%	15.0%	10.6%	8.7%
Belgium	8.0%	14.8%	11.2%	15.8%	28.0%	13.7%	8.6%
Denmark	6.8%	11.3%	10.6%	16.1%	32.7%	15.2%	7.4%
Finland	4.1%	16.6%	15.4%	14.5%	22.2%	15.8%	11.3%
France	7.3%	16.5%	15.2%	17.4%	24.1%	10.0%	9.5%
Germany	5.4%	14.8%	14.4%	17.5%	25.7%	13.2%	9.0%
Ireland	7.7%	15.2%	18.4%	15.8%	21.7%	10.6%	10.6%
Italy	5.1%	16.2%	16.7%	23.1%	22.4%	11.1%	5.4%
The Netherlands	6.3%	13.6%	14.4%	19.0%	28.6%	10.2%	7.9%
Norway	7.6%	18.7%	13.2%	18.8%	22.0%	11.2%	8.4%
Portugal	5.2%	11.5%	17.5%	24.9%	26.5%	9.9%	4.5%
Russian Federation	5.8%	15.3%	25.3%	26.0%	15.0%	6.2%	6.4%
Spain	5.7%	18.4%	21.8%	17.3%	20.6%	10.3%	5.9%
Sweden	6.3%	12.3%	9.6%	17.6%	33.4%	14.1%	6.7%
Switzerland	5.6%	14.3%	12.6%	17.3%	30.8%	12.2%	7.3%
Turkey	7.7%	13.1%	14.1%	22.6%	30.0%	6.5%	5.9%
Uk	5.8%	13.3%	15.4%	18.4%	24.3%	12.2%	10.7%
Other Europe	8.5%	16.7%	21.6%	19.8%	21.2%	7.3%	5.0%
MIDDLE EAST	7.9%	18.1%	24.4%	18.6%	15.1%	9.9%	6.1%
United Arab Emirates	5.4%	16.7%	20.6%	33.4%	12.6%	10.0%	1.4%
Other Middle East	8.4%	18.3%	25.2%	15.5%	15.6%	9.9%	7.1%
NORTH AMERICA	6.8%	13.0%	12.7%	15.9%	23.4%	14.0%	14.2%
Canada	5.5%	8.8%	11.4%	14.7%	28.4%	13.5%	17.7%
USA	7.0%	13.6%	12.9%	16.1%	22.6%	14.1%	13.7%
Other North America	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	13.5%	19.7%	16.9%	19.5%	19.8%	6.7%	4.0%



ACTIVITIES

APPENDIX

ACTIVITIES UNDERTAKEN

	2024															
	ACTIVITIES UNDERTAKEN															
	Shopping	Nightlife	Theme parks	Trading	Visited a Casino	Adventure	Sporting - competed	Sporting - spectator	Business	Education training study	Cultural, historical and heritage	Wildlife	Hunting	Visiting natural attractions	Beach	
AFRICA	76.8%	69.1%	30.1%	94.1%	67.3%	9.7%	67.0%	72.2%	36.4%	77.7%	16.0%	8.5%	10.6%	13.1%	31.0%	
Botswana	3.4%	6.1%	1.1%	3.0%	1.0%	0.6%	3.2%	1.5%	2.0%	2.3%	0.5%	0.2%	0.5%	0.3%	0.6%	
Lesotho	8.2%	25.7%	7.4%	3.9%	19.5%	1.5%	24.1%	28.5%	1.9%	29.8%	2.0%	0.5%	5.4%	2.0%	3.8%	
Malawi	2.1%	1.5%	0.5%	13.7%	2.4%	0.1%	0.3%	3.0%	1.5%	1.7%	0.5%	0.2%	2.6%	0.2%	0.8%	
Mozambique	22.0%	1.9%	0.6%	8.1%	2.0%	0.1%	0.3%	0.8%	2.6%	4.0%	0.3%	0.2%	0.0%	0.7%	0.6%	
Namibia	1.5%	2.0%	2.0%	0.3%	1.1%	2.4%	6.8%	5.0%	2.4%	4.7%	2.3%	0.7%	1.3%	1.2%	5.0%	
Eswatini	6.0%	3.7%	0.0%	4.0%	3.9%	0.2%	14.0%	2.4%	0.5%	3.5%	0.4%	0.3%	0.0%	0.1%	6.4%	
Zambia	1.8%	1.1%	0.8%	7.9%	2.0%	0.2%	0.9%	2.8%	2.5%	3.0%	0.7%	0.2%	0.0%	0.4%	1.1%	
Zimbabwe	28.5%	23.3%	13.0%	52.6%	29.6%	1.9%	15.1%	25.6%	11.1%	15.7%	4.4%	4.3%	0.0%	4.1%	9.5%	
Angola	0.4%	0.7%	0.3%	0.1%	0.4%	0.5%	0.2%	0.3%	0.9%	1.4%	0.5%	0.3%	0.0%	0.6%	0.5%	
DRC	0.3%	0.3%	0.5%	0.1%	0.7%	0.2%	0.2%	0.4%	1.0%	1.1%	0.4%	0.1%	0.0%	0.3%	0.3%	
Ethiopia	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.1%	0.0%	0.4%	0.3%	0.1%	0.1%	0.0%	0.1%	0.1%	
Ghana	0.4%	0.6%	0.8%	0.0%	0.7%	0.4%	0.2%	0.1%	1.2%	1.8%	0.7%	0.3%	0.4%	0.6%	0.5%	
Kenya	0.5%	0.4%	0.6%	0.0%	0.8%	0.4%	0.3%	0.6%	2.4%	2.9%	0.9%	0.2%	0.0%	0.5%	0.5%	
Nigeria	0.3%	0.5%	0.4%	0.0%	0.5%	0.2%	0.3%	0.2%	1.1%	1.1%	0.4%	0.2%	0.1%	0.3%	0.3%	
Tanzania	0.3%	0.2%	0.5%	0.1%	0.2%	0.1%	0.1%	0.4%	1.0%	1.4%	0.5%	0.1%	0.3%	0.3%	0.2%	
Uganda	0.2%	0.2%	0.3%	0.0%	0.3%	0.0%	0.2%	0.2%	0.7%	0.7%	0.2%	0.0%	0.0%	0.1%	0.1%	
Other Africa	0.7%	1.0%	1.2%	0.1%	1.9%	0.8%	0.6%	0.5%	3.1%	2.3%	1.3%	0.8%	0.0%	1.1%	0.8%	
ASIA	2.2%	2.1%	5.2%	0.4%	7.2%	3.6%	1.8%	1.3%	11.5%	3.4%	4.7%	4.0%	1.3%	5.3%	4.0%	
China including Hong Kong	0.5%	0.6%	1.0%	0.1%	1.2%	0.7%	0.5%	0.4%	3.0%	0.4%	0.9%	0.8%	0.4%	1.0%	0.8%	
India	0.8%	0.4%	2.1%	0.1%	3.8%	1.4%	0.5%	0.5%	4.9%	2.0%	1.7%	1.6%	0.2%	2.1%	1.6%	
Japan	0.2%	0.1%	0.2%	0.0%	0.2%	0.3%	0.2%	0.1%	1.0%	0.2%	0.3%	0.0%	0.4%	0.3%	0.3%	
Malaysia	0.1%	0.1%	0.1%	0.0%	0.1%	0.2%	0.1%	0.0%	0.3%	0.1%	0.2%	0.2%	0.3%	0.2%	0.2%	
Singapore	0.1%	0.1%	0.2%	0.1%	0.1%	0.3%	0.0%	0.0%	0.6%	0.1%	0.4%	0.3%	0.0%	0.3%	0.2%	
South Korea	0.1%	0.3%	0.2%	0.1%	0.3%	0.2%	0.1%	0.1%	0.4%	0.1%	0.2%	0.2%	0.2%	0.4%	0.3%	
Other Asia	0.4%	0.5%	1.3%	0.1%	1.5%	0.5%	0.4%	0.2%	1.2%	0.4%	1.0%	0.6%	0.3%	1.0%	0.7%	
AUSTRALASIA	1.4%	1.3%	2.8%	0.1%	2.8%	3.3%	1.9%	2.2%	1.5%	0.4%	3.9%	4.8%	2.1%	4.3%	3.6%	
Australia	1.1%	1.1%	2.4%	0.1%	2.4%	2.8%	1.5%	1.6%	1.3%	0.3%	3.2%	4.1%	2.1%	3.6%	2.9%	
New Zealand	0.2%	0.2%	0.3%	0.0%	0.4%	0.5%	0.5%	0.6%	0.2%	0.1%	0.6%	0.7%	0.0%	0.7%	0.7%	
Other Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
CENTRAL & SOUTH AMERICA	0.9%	1.1%	2.6%	0.2%	1.0%	2.3%	0.7%	0.6%	2.3%	1.5%	3.8%	3.6%	1.4%	3.2%	2.2%	
Argentina	0.1%	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.1%	0.2%	0.1%	0.3%	0.2%	0.2%	0.2%	0.2%	
Brazil	0.6%	0.9%	2.4%	0.2%	0.5%	1.8%	0.3%	0.3%	1.5%	1.2%	3.0%	2.7%	0.8%	2.5%	1.7%	
Chile	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.1%	0.1%	
Other Central & South America	0.1%	0.1%	0.1%	0.0%	0.3%	0.3%	0.2%	0.2%	0.4%	0.1%	0.4%	0.5%	0.3%	0.4%	0.2%	
EUROPE	13.5%	20.1%	44.6%	4.5%	13.0%	62.4%	24.6%	18.7%	37.2%	12.2%	52.9%	57.9%	14.7%	55.0%	45.9%	
Austria	0.2%	0.3%	1.3%	0.1%	0.2%	1.3%	0.3%	0.1%	0.6%	0.3%	1.2%	1.3%	0.1%	1.1%	0.9%	
Belgium	0.4%	0.6%	1.3%	0.1%	0.7%	2.2%	0.4%	0.4%	1.0%	0.5%	2.2%	2.3%	0.2%	2.0%	1.5%	
Denmark	0.2%	0.3%	0.6%	0.1%	0.5%	1.0%	0.3%	0.2%	0.4%	0.2%	0.9%	1.1%	1.7%	0.8%	0.6%	
Finland	0.1%	0.1%	0.3%	0.0%	0.1%	0.4%	0.2%	0.1%	0.2%	0.0%	0.3%	0.4%	0.0%	0.3%	0.3%	
France	1.3%	2.1%	4.8%	0.5%	0.9%	6.8%	2.8%	2.1%	3.4%	1.7%	6.7%	6.9%	2.1%	6.0%	4.6%	
Germany	2.6%	3.9%	11.3%	0.8%	2.3%	13.6%	4.1%	2.2%	7.5%	2.4%	11.6%	12.6%	2.9%	11.9%	9.6%	
Ireland	0.4%	0.5%	1.2%	0.2%	0.3%	1.4%	0.9%	0.8%	0.6%	0.2%	1.3%	1.3%	0.9%	1.4%	1.3%	
Italy	0.5%	0.7%	2.1%	0.2%	0.4%	2.7%	0.9%	0.6%	1.9%	0.4%	2.6%	2.8%	0.8%	2.5%	1.7%	
The Netherlands	1.3%	2.1%	3.3%	0.3%	0.5%	6.8%	1.6%	1.7%	3.2%	1.1%	4.9%	6.2%	0.8%	5.4%	4.9%	
Norway	0.1%	0.2%	0.6%	0.1%	0.0%	0.8%	0.3%	0.3%	0.3%	0.2%	0.6%	0.7%	0.8%	0.6%	0.6%	
Portugal	0.2%	0.3%	0.3%	0.0%	0.1%	0.6%	0.2%	0.2%	0.8%	0.1%	0.5%	0.5%	0.0%	0.6%	0.5%	
Russian Federation	0.4%	0.3%	0.9%	0.3%	0.5%	1.1%	0.4%	0.3%	2.1%	0.4%	1.0%	1.2%	0.2%	1.1%	0.8%	
Spain	0.3%	0.5%	1.1%	0.2%	0.2%	1.5%	0.4%	0.6%	1.1%	0.5%	1.5%	1.5%	0.0%	1.5%	1.0%	
Sweden	0.3%	0.5%	1.0%	0.1%	0.2%	1.6%	0.3%	0.3%	0.8%	0.4%	1.3%	1.4%	0.4%	1.2%	1.1%	
Switzerland	0.5%	0.7%	2.3%	0.1%	0.3%	2.7%	1.4%	0.8%	1.0%	0.5%	2.1%	2.2%	0.1%	2.1%	1.9%	
Turkey	0.2%	0.2%	0.5%	0.0%	0.2%	0.5%	0.3%	0.3%	1.1%	0.2%	0.4%	0.4%	0.0%	0.5%	0.4%	
Uk	4.1%	6.3%	10.8%	1.3%	5.1%	16.2%	8.4%	6.8%	9.0%	2.8%	12.4%	13.3%	3.8%	14.5%	13.2%	
Other Europe	0.5%	0.2%	0.8%	0.0%	0.5%	1.3%	1.4%	0.9%	2.1%	0.3%	1.4%	1.7%	0.0%	1.5%	1.1%	
MIDDLE EAST	0.5%	0.8%	1.5%	0.0%	1.7%	1.1%	0.1%	0.1%	0.8%	0.8%	0.8%	0.9%	0.5%	1.3%	0.7%	
United Arab Emirates	0.1%	0.1%	0.2%	0.0%	0.7%	0.2%	0.0%	0.0%	0.1%	0.3%	0.1%	0.1%	0.3%	0.2%	0.1%	
Other Middle East	0.5%	0.7%	1.3%	0.0%	1.0%	0.9%	0.1%	0.1%	0.6%	0.5%	0.7%	0.8%	0.1%	1.2%	0.6%	
NORTH AMERICA	4.7%	5.5%	13.1%	0.7%	7.0%	17.6%	3.9%	4.9%	10.4%	3.9%	18.0%	20.2%	69.4%	17.7%	12.6%	
Canada	0.6%	0.7%	1.4%	0.2%	1.0%	2.9%	1.0%	0.3%	0.9%	0.5%	2.6%	3.1%	3.9%	2.8%	2.2%	
USA	4.1%	4.8%	11.7%	0.5%	6.0%	14.6%	2.9%	4.6%	9.5%	3.4%	15.4%	17.1%	65.4%	14.9%	10.4%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	



INTERNATIONAL ARRIVALS – PROVINCIAL DISTRIBUTION

APPENDIX

INTERNATIONAL TOURIST ARRIVALS - PROVINCIAL DISTRIBUTION

	2024									
	Gauteng	Western Cape	Eastern Cape	KwaZulu-Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State	
Africa	2 918 171	338 030	82 642	486 244	1 776 784	487 781	266 782	51 896	709 424	
Botswana	184 634	6 617	5 756	10 339	8 309	72 400	121 862	2 418	20 069	
Lesotho	216 557	40 266	12 118	26 975	8 396	3 191	51 078	11 149	655 791	
Malawi	146 045	12 682	1 557	7 345	863	2 467	2 769	89	598	
Mozambique	272 187	9 513	2 595	6 768	1 329 419	15 701	10 415	236	2 383	
Namibia	43 209	89 939	5 338	3 198	1 619	1 651	7 289	27 643	2 723	
Swaziland	200 731	1 939	2 791	285 613	367 398	5 329	9 644	545	1 050	
Zambia	114 483	10 011	3 248	30 896	2 279	2 191	1 329	56	636	
Zimbabwe	1 561 317	112 058	40 105	96 646	51 878	381 387	56 405	8 714	24 047	
Angola	21 268	8 429	428	1 168	202	387	403	187	118	
Democratic Republic of Congo	20 471	3 711	1 161	1 444	946	346	1 042	216	547	
Ethiopia	4 431	1 552	479	470	176	119	114	0	25	
Ghana	22 661	8 232	1 146	1 699	803	189	1 084	131	192	
Kenya	30 212	8 843	1 244	3 813	1 172	564	871	157	698	
Nigeria	15 634	5 026	608	1 429	504	179	609	134	141	
Tanzania	17 908	3 399	792	1 944	699	356	449	0	80	
Uganda	9 671	1 754	580	1 191	414	246	373	0	76	
Other Africa	36 752	14 060	2 698	5 306	1 708	1 078	1 048	220	251	
Asia	102 371	62 157	13 201	27 252	12 440	5 924	9 474	1 753	2 674	
China including Hong Kong	25 753	12 306	2 918	4 687	2 405	1 417	1 737	601	1 046	
India	37 717	20 440	4 229	15 051	4 222	1 296	4 990	290	235	
Japan	9 846	5 165	1 311	1 627	1 259	571	502	255	301	
Malaysia	3 465	3 299	548	452	673	400	366	0	98	
Singapore	4 450	5 194	528	628	775	672	149	86	127	
South Korea	6 219	4 137	1 025	1 319	854	300	838	79	472	
Other Asia	14 921	11 616	2 642	3 489	2 251	1 267	891	442	396	
Australasia	60 954	53 793	13 318	16 953	20 523	8 551	7 077	1 368	2 713	
Australia	50 108	44 693	10 348	13 890	18 055	7 051	5 932	1 166	2 036	
New Zealand	10 832	9 078	2 970	3 057	2 448	1 500	1 145	202	677	
Other Australasia	14	21	0	6	20	0	0	0	0	
South America	42 485	37 477	7 122	4 723	16 717	6 337	5 583	280	702	
Argentina	3 244	2 643	521	347	987	425	792	16	197	
Brazil	31 317	29 401	5 559	3 195	12 596	4 728	4 036	103	337	
Chile	2 063	1 622	218	325	655	436	117	62	0	
Other Central & South America	5 861	3 811	825	856	2 479	746	638	99	168	
Europe	454 776	682 174	148 081	124 858	212 063	87 796	50 060	13 465	18 157	
Austria	7 937	12 790	3 835	2 434	4 528	2 335	796	306	481	
Belgium	18 260	22 980	5 319	5 425	9 519	4 228	2 378	604	642	
Denmark	5 691	9 113	2 495	1 211	3 691	2 925	1 320	589	181	
Finland	2 170	4 006	920	381	1 323	625	58	61	140	
France	44 834	69 715	12 503	15 343	31 424	9 441	4 346	701	1 453	
Germany	86 587	145 329	36 860	23 716	52 992	20 575	10 144	1 809	3 008	
Ireland	9 958	17 423	4 753	3 602	3 361	1 483	1 096	645	597	
Italy	19 208	31 610	5 338	3 835	13 161	4 289	1 502	589	410	
Netherlands	40 003	68 716	16 961	15 274	25 486	11 228	4 446	1 333	2 753	
Norway	3 685	7 583	1 606	1 003	1 763	1 677	320	171	241	
Portugal	6 651	7 059	774	943	1 324	572	283	126	194	
Russian Fed	15 595	12 469	2 397	2 787	3 630	1 455	1 246	1 738	327	
Spain	12 592	17 010	2 353	2 255	7 421	1 798	1 755	1 039	170	
Sweden	7 374	15 186	3 557	2 802	4 026	2 345	854	355	203	
Switzerland	14 154	27 415	6 372	3 747	7 574	2 998	1 709	619	553	
Turkey	6 628	6 824	568	1 031	1 154	322	386	124	382	
UK	134 420	189 848	37 185	35 808	33 750	16 990	14 538	2 097	5 592	
Other Europe	19 030	17 100	4 286	3 260	5 936	2 509	2 883	560	829	
Middle East	20 505	15 397	2 076	5 023	2 121	1 474	1 546	224	638	
UAE	3 356	3 426	120	487	335	255	143	204	33	
Other Middle East	17 149	11 971	1 957	4 536	1 786	1 219	1 404	20	605	
North America	204 311	195 879	32 752	45 860	81 884	43 017	20 758	6 224	9 219	
Canada	24 760	32 575	6 665	7 421	11 999	3 598	2 464	799	1 259	
USA	179 549	163 303	26 087	38 440	69 884	39 418	18 293	5 425	7 960	
TOTAL	3 803 574	1 384 908	299 193	710 914	2 122 532	640 879	361 280	75 209	743 527	



TOP 20 ATTRACTIONS PER PROVINCE

APPENDIX

	GAUTENG TOP 20 ATTRACTIONS		
	2019	2023	2024
Sandton City / Mandela Square	40.1%	44.0%	45.1%
Mall of Africa	5.0%	13.2%	17.2%
Did not visit any	18.7%	18.7%	15.6%
Apartheid Museum	23.8%	11.3%	15.6%
Mandela House (Soweto)	15.0%	12.1%	13.7%
Menlyn Maine Shopping Centre	0.0%	9.5%	13.3%
Tour of Soweto	14.1%	11.0%	12.7%
Eastgate Mall	11.4%	10.4%	10.3%
Constitution Hill	7.8%	6.3%	7.8%
Maboneng Precinct (e.g., Pop Art Theatre, Cinema, Gallery, etc.)	6.7%	3.7%	5.2%
Rosebank	3.6%	4.5%	5.2%
Rhino and Lion Nature Reserve	10.8%	4.4%	5.1%
Union Buildings	5.9%	3.9%	5.1%
Braamfontein Neighbour Goods Market	8.4%	2.0%	3.3%
Fourways	1.5%	2.1%	3.0%
Maropeng and Sterkfontein Caves (Cradle of Humankind)	4.6%	2.5%	2.9%
Newtown Market Theatre	1.6%	1.6%	2.4%
Walter Sisulu Botanical Gardens	1.7%	1.6%	2.4%
NewTown Precinct Mall / Turbine Hall	1.4%	1.0%	2.1%
Montecasino	0.0%	1.6%	1.9%

	WESTERN CAPE TOP 20 ATTRACTIONS		
	2019	2023	2024
V&A Waterfront	70.7%	75.2%	78.3%
Cape Town Central City	61.8%	62.5%	65.9%
Camps Bay	57.8%	56.4%	59.8%
Boulder National Park	41.6%	56.3%	56.2%
Cape Point	59.0%	53.2%	55.4%
The Cape Winelands	41.5%	49.7%	53.8%
Table Mountain Cableway	47.6%	48.5%	50.5%
Kirstenbosch Botanical Gardens	29.0%	33.1%	34.7%
Lion's Head	0.7%	20.5%	32.2%
Canal Walk Shopping Centre	0.9%	21.6%	32.0%
Clifton Beach	29.2%	22.0%	28.3%
The Garden Route	27.4%	27.5%	25.0%
Muizenberg Beach	17.3%	19.2%	23.9%
Table Mountain (not cableway)	30.4%	27.2%	23.2%
Hermanus	18.6%	20.4%	20.4%
Robben Island	17.4%	17.7%	20.3%
Tsitsikamma National Park	15.8%	14.3%	15.6%
Cango Caves	13.9%	13.5%	14.3%
Cape Agulhas	10.6%	12.7%	12.6%
Cape Town Ostrich Ranch / Cape Point Ostrich Farms	7.4%	11.2%	11.5%

APPENDIX

	EASTERN CAPE TOP 20 ATTRACTIONS		
	2019	2023	2024
Addo Elephant National Park	53.6%	55.9%	55.4%
Storms River	38.8%	34.9%	32.2%
Boardwalk Shopping Mall	12.2%	18.7%	23.7%
Bloukrans Bridge Bungey (Highest Bungee)	17.7%	15.7%	23.1%
Walmer Park	8.6%	15.9%	19.8%
Greenacres Mall	9.6%	13.7%	17.6%
Did not visit any	12.4%	13.1%	15.8%
Tree Top Canopy Tour, Tsitsikamma Forest	11.9%	18.9%	13.9%
Valley of Desolation / Owl House / Karoo / Olive Schreiner Museum	4.4%	7.1%	8.5%
Steve Biko Monument and Museum and Grave Site - (King William's Town, Ginsberg & East London)	2.3%	6.0%	8.2%
Nelson Mandela Museum (Mthatha)	6.9%	7.7%	7.6%
Wild Fly Fishing - Somerset East	1.8%	7.7%	7.2%
Nelson Mandela's Homestead / Gravesite (Qunu)	3.3%	4.8%	5.1%
Tiffendel Ski Resort	8.0%	4.3%	2.7%
Baywest Mall	0.6%	1.3%	1.5%
Amakhala Game Reserve	0.7%	1.5%	1.1%
Hemmingways Mall	0.6%	0.9%	1.1%
Jeffreys Bay	1.1%	0.4%	0.9%
Pumba Game reserve	0.4%	0.9%	0.9%
Kariega Game Reserve	0.5%	0.9%	0.7%

	KwaZULU-NATAL TOP 20 ATTRACTIONS		
	2019	2023	2024
Durban North Coast (Umhlanga, Umdloti, Ballito, Zimbali, Salt Rock, Shaka's Rock)	22.9%	34.6%	38.9%
Gateway Mall	27.4%	32.5%	34.1%
Durban North Beach	25.7%	26.6%	24.3%
Drakensberg Mountains	31.7%	23.8%	22.5%
Elephant Coast (e.g. iSimangaliso Wetland Park World Heritage Site, Hluhluwe-iMfolozi, Tembe, Ndumu, Phinda)	22.8%	20.5%	22.1%
Drakensberg Gardens / Sani Pass / Amphitheatre / Cathedral Peak	19.9%	20.8%	20.6%
uShaka Marine World	16.6%	17.8%	18.5%
Durban South Beach	26.9%	18.5%	17.8%
Pavilion Mall	10.2%	16.8%	16.1%
Pietermaritzburg and Midlands (Midlands Meander, Mooi River, Nottingham Road, Howick etc.)	8.2%	10.7%	12.7%
La Lucia	17.9%	11.7%	12.2%
Did not visit any	7.1%	8.6%	10.5%
iSimangaliso Wetland Park	13.6%	9.5%	9.4%
Florida Road (Durban)	11.7%	8.4%	8.9%
Zululand cultural villages (Richards Bay, Eshowe, Shakaland, Ulundi, Nongoma)	7.3%	6.8%	8.7%
South Coast Beach Resorts and attractions (Amanzimtoti, Port Shepstone, Scottburgh, Margate, Southbroom, Port Edward)	3.5%	4.9%	5.7%
Sodwana Bay	3.6%	3.2%	4.6%
Royal Natal National Park	9.1%	3.8%	4.3%
Sun Coast Casino	4.2%	3.7%	4.1%
Moses Mabhida Stadium	5.2%	3.8%	3.6%

APPENDIX

	MPUMALANGA TOP 20 ATTRACTIONS		
	2019	2023	2024
Kruger Park via Skukuza, Numbi, Malelane, Crocodile Bridge	86.6%	84.7%	85.2%
Blyde River Canyon / God's Window	49.5%	50.8%	53.2%
Bourke's Luck Potholes	23.2%	27.2%	30.8%
Hazyview (Cable slide, Hot air ballooning, Abseiling, Elephant Sanctuary, Game drives, etc.)	14.7%	24.3%	24.3%
Panorama Route	22.2%	22.5%	23.4%
Three Rondavels	0.4%	12.5%	18.8%
Pilgrim's Rest	11.3%	13.1%	15.7%
Hazyview Mall	9.9%	13.9%	12.3%
White river	8.4%	8.2%	10.9%
Sabie	8.5%	8.3%	9.9%
Mala Mala Game Reserve	1.4%	5.0%	9.3%
Dullstroom fly fishing	4.0%	11.8%	8.2%
The Pinnacle	6.6%	5.6%	8.1%
Nelspruit Botanical Gardens	4.2%	6.3%	7.6%
Sabi Sabi Game Reserve	4.7%	11.0%	7.4%
Sabi Sands Game Reserve	5.8%	5.2%	6.9%
Crocriver Enviro Park	2.9%	4.2%	6.0%
Lydenburg (Voortrekker graves, Mapoch's caves, Gustav Klingbiel Nature Reserve etc.)	2.2%	4.4%	5.2%
Londolozi Game Reserve	4.2%	2.3%	4.4%
Did not visit any	2.3%	3.5%	4.1%

	LIMPOPO TOP 20 ATTRACTIONS		
	2019	2023	2024
Kruger National Park via Orpen, Phalaborwa, Punda Maria	61.4%	65.7%	65.8%
Mapungubwe National Park	16.1%	18.3%	20.1%
Bela Bela Conservancy	10.5%	10.4%	14.7%
Did not visit any	10.3%	7.8%	8.0%
Mapungubwe Cultural Landscape	7.1%	5.6%	6.8%
Southpansberg Mountains	4.0%	3.6%	5.4%
Nandoni Dam	2.8%	3.4%	3.8%
The Chuene Resort	1.1%	2.4%	3.7%
Names of Resorts/Safari	0.0%	2.1%	2.9%
Ga (modjadji) / Motjaji	1.8%	3.5%	2.7%
Mall of the North	1.8%	2.4%	2.1%
Mabula Game Reserve	1.1%	1.2%	1.6%
Timbavati Game Reserve	0.7%	1.5%	1.6%
Private Game Reserves	0.0%	1.6%	1.5%
Kapama Game Reserve	1.7%	1.3%	1.5%
Thorny Bush Game Reserve	0.6%	0.9%	1.3%
Karongwe Game Reserve	1.5%	1.2%	1.0%
Makalali Game Reserve	0.6%	0.7%	0.9%
Welgevanden Game Reserve	0.8%	1.0%	0.8%
Marakele National Park	0.3%	0.4%	0.6%

APPENDIX

	NORTH WEST TOP 20 ATTRACTIONS		
	2019	2023	2024
Pilanesberg National Park	49.1%	41.6%	45.5%
Sun City Lost City	36.2%	26.3%	28.2%
Hartbeespoort Dam	13.1%	15.2%	15.4%
Madikke Game Reserve	8.8%	13.0%	10.9%
Hartbeespoort Snake Park	4.6%	10.8%	10.4%
Waterfall Mall (Rustenburg)	4.6%	7.7%	8.4%
Did not visit any	8.9%	7.6%	6.5%
North-West University, Potchefstroom Campus	5.3%	7.4%	6.1%
The cradle of humankind	4.4%	7.5%	5.8%
Barberspan Bird Sanctuary	1.1%	8.5%	5.6%
Klerksdorp Mall	3.0%	6.7%	4.6%
Brits Mall	2.3%	5.1%	4.3%
Mooi River Mall	1.3%	2.4%	3.5%
Upside-down House	0.0%	2.1%	2.7%
Mafikeng Mall	1.9%	4.3%	2.3%
Bloemhof Dam Nature Reserve	0.9%	3.4%	2.2%
Magaliesburg Resort	1.9%	2.9%	2.2%
Ukutula Game Lodge	0.6%	2.9%	1.8%
Vredefort crater / Vredefort Dome	0.3%	1.2%	1.2%
Elephant / Monkey Santuary	0.3%	0.5%	0.8%

	NORTHERN CAPE TOP 20 ATTRACTIONS		
	2019	2023	2024
Kimberley Big Hole	22.0%	29.3%	33.2%
Kimberley Mine Museum	12.3%	20.2%	23.5%
Kgalagadi Transfrontier Park	24.8%	19.1%	23.0%
Diamond Pavilion Mall	11.3%	27.3%	22.7%
Did not visit any	28.3%	22.4%	20.0%
Augrabies Falls	23.4%	16.3%	19.3%
Mokala National Park	11.0%	12.0%	13.7%
Namaqualand Flowers	12.9%	10.9%	11.0%
Blue flag beach at Mcdougal Bay	5.0%	6.4%	4.7%
San Cultural Villages (e.g. Khomani San Village etc) (Specify)	4.2%	7.6%	4.7%
Sutherland and Carnarvon - Stargazing (Salt and SKA)	2.0%	5.3%	3.0%
Kalahari Mall	0.1%	1.1%	2.8%
Names of Resorts/Safari	0.0%	2.2%	2.1%
North Cape Mall	0.1%	2.0%	1.6%
Private Game Reserve	0.0%	1.1%	1.1%
Orange River	1.5%	0.5%	1.0%
Uppington Mall	0.0%	0.0%	0.8%
Diamond Pavillion Shopping Centre	0.0%	0.6%	0.6%
Farm	0.4%	0.3%	0.5%
Battlefields	0.0%	0.0%	0.3%

APPENDIX

	FREE STATE TOP 20 ATTRACTIONS		
	2019	2023	2024
Mimosa Mall	17.1%	26.0%	27.6%
Did not visit any	27.5%	29.5%	25.2%
Waterfront	17.3%	20.8%	22.2%
Golden Gate Highlands National Park	23.7%	13.4%	16.0%
Welkom Mall	7.9%	10.6%	12.6%
Clarens Ash River Outfall	6.9%	8.8%	6.9%
Free State Stadium/Vodacom Park	6.3%	5.9%	6.0%
Cheetah Experience	10.6%	6.6%	6.0%
University of the Free State	6.9%	6.9%	5.9%
Sterkfontein Dam Nature Reserve	5.7%	2.5%	5.3%
Basotho cultural village	6.9%	4.5%	4.9%
Gariep Dam	4.9%	6.1%	4.6%
Black Mountain Hotel	3.2%	3.2%	3.7%
Bushmen Paintings in Schaapplaats	2.0%	3.2%	3.2%
Maluti Cave Hiking Trail	3.0%	2.8%	2.6%
Dihlabeng Mall	0.0%	0.6%	1.5%
Farm	0.7%	0.4%	1.4%
Names of Resorts/Safari	0.0%	1.1%	1.2%
Northridge Mall	0.4%	0.8%	1.1%
Goldfields Mall	0.3%	0.5%	1.1%



PROVINCIAL TOP 20 VISITED ATTRACTIONS BY SOURCE MARKETS

APPENDIX

GAUTENG TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

America	0.0%	0.0%
TOTAL	15.1%	17.2%

APPENDIX

WESTERN CAPE TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

		Western Cape Top 20 Attractions by Source Markets - 2024																																			
		Cape Town Central City		Camps Bay		Cape Point		Table Mountain Cableway		The Cape Winelands		Boulder National Park		Kirstenbosch Botanical Gardens		Table Mountain (not cableway)		The Garden Route		Clifton Beach		Robben Island		Tsitsikamma National Park		Muizenberg Beach		Cango Caves		Cape Agulhas		Canal Walk Shopping Centre		Lion's Head		The Karo / Karoo National Park	
AFRICA		79.2%	48.0%	43.5%	28.9%	32.1%	26.6%	22.3%	14.9%	13.9%	5.5%	17.0%	9.1%	3.2%	5.1%	11.8%	4.4%	4.3%	36.1%	14.9%	2.1%																
Botswana		76.6%	52.3%	44.6%	28.5%	25.1%	19.6%	19.4%	7.6%	8.9%	1.4%	9.6%	7.5%	2.5%	2.6%	10.3%	0.0%	2.3%	27.2%	15.0%	1.0%																
Lesotho		87.8%	28.1%	42.2%	28.1%	29.2%	43.8%	15.9%	0.0%	15.9%	0.0%	15.9%	0.0%	0.0%	17.5%	0.0%	0.0%	17.0%	15.9%	0.0%	0.0%																
Malawi		77.0%	37.3%	40.1%	28.4%	32.2%	14.9%	9.2%	11.7%	13.6%	1.7%	4.2%	4.7%	3.5%	1.7%	8.9%	0.0%	2.1%	41.8%	10.3%	0.0%																
Mozambique		77.4%	36.9%	26.8%	34.5%	22.5%	15.2%	17.3%	13.9%	15.9%	2.5%	11.6%	4.0%	1.2%	3.4%	11.4%	0.0%	0.0%	18.8%	5.9%	3.8%																
Namibia		81.6%	68.5%	54.0%	30.1%	32.5%	46.0%	27.2%	23.5%	11.2%	5.6%	27.6%	15.3%	7.2%	8.8%	12.2%	11.4%	7.3%	50.4%	21.1%	3.6%																
Eswatini		89.8%	31.3%	10.2%	31.4%	30.9%	20.1%	9.9%	9.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.9%	24.5%	9.9%	0.0%															
Zambia		72.3%	31.4%	25.8%	24.2%	29.3%	16.7%	18.3%	12.0%	11.4%	4.4%	9.1%	7.6%	1.6%	2.9%	14.4%	1.4%	3.8%	25.4%	9.1%	0.0%																
Zimbabwe		75.8%	33.5%	34.8%	20.8%	28.9%	20.0%	12.1%	10.3%	14.5%	6.2%	13.6%	6.3%	1.0%	3.2%	10.1%	2.5%	2.8%	32.2%	10.1%	1.3%																
Angola		90.6%	78.1%	69.5%	44.7%	40.5%	35.0%	42.9%	27.5%	18.9%	7.3%	26.4%	14.1%	6.7%	8.7%	21.9%	10.5%	12.0%	61.6%	24.3%	6.8%																
DRC		73.7%	45.7%	48.1%	52.2%	31.6%	22.1%	22.0%	17.1%	9.7%	8.0%	19.7%	3.9%	1.5%	1.5%	15.8%	5.0%	3.2%	31.9%	13.7%	0.0%																
Ethiopia		70.0%	51.4%	44.0%	31.3%	32.6%	14.8%	18.1%	14.0%	14.1%	8.6%	13.8%	9.5%	6.6%	8.5%	15.3%	4.3%	5.1%	27.5%	20.6%	3.2%																
Ghana		81.8%	50.5%	51.8%	20.4%	42.4%	17.9%	19.2%	7.8%	21.0%	5.0%	13.9%	4.6%	2.6%	3.3%	5.5%	0.0%	1.4%	24.1%	12.8%	2.3%																
Kenya		80.5%	52.3%	37.1%	29.6%	27.4%	21.4%	23.9%	11.3%	12.4%	6.0%	17.2%	9.3%	2.8%	1.5%	10.2%	0.8%	2.6%	27.7%	14.5%	1.8%																
Nigeria		80.0%	49.8%	52.0%	28.4%	34.2%	23.4%	21.6%	7.5%	17.0%	5.4%	19.1%	6.5%	2.8%	2.6%	7.9%	1.7%	3.3%	33.3%	14.5%	1.1%																
Tanzania		79.0%	30.1%	40.2%	27.7%	35.2%	18.4%	21.5%	7.6%	18.0%	3.9%	9.1%	7.7%	0.0%	2.5%	12.0%	2.6%	1.4%	39.7%	17.9%	1.4%																
Uganda		70.7%	41.4%	38.5%	21.8%	25.1%	12.4%	14.9%	0.0%	3.0%	4.3%	5.9%	5.9%	0.0%	0.0%	2.4%	0.0%	0.0%	22.6%	8.0%	0.0%																
Other Africa		83.5%	52.5%	49.1%	38.8%	38.5%	38.6%	41.1%	24.7%	13.9%	6.9%	20.8%	14.6%	4.8%	11.8%	17.2%	7.6%	5.9%	40.0%	22.0%	2.0%																
ASIA		79.3%	65.8%	54.0%	54.1%	52.3%	40.8%	51.2%	26.0%	17.2%	16.2%	20.1%	16.1%	11.7%	16.0%	19.3%	13.9%	11.0%	31.3%	27.5%	5.9%																
China including Hong Kong		71.6%	58.4%	48.0%	48.0%	41.9%	43.6%	40.8%	22.2%	14.1%	12.3%	19.9%	12.4%	9.5%	13.2%	13.2%	8.5%	9.4%	29.4%	19.7%	5.2%																
India		80.0%	69.3%	59.3%	62.2%	59.0%	37.6%	58.0%	27.4%	18.3%	21.1%	24.2%	16.3%	17.5%	19.7%	23.8%	20.9%	13.2%	32.3%	32.9%	7.4%																
Japan		78.3%	55.1%	50.6%	55.5%	44.0%	34.9%	46.6%	24.3%	18.4%	14.1%	12.2%	12.5%	7.1%	8.5%	14.8%	7.7%	4.8%	17.8%	26.1%	3.4%																
Malaysia		85.1%	80.7%	65.0%	47.2%	56.3%	49.6%	57.0%	27.4%	16.0%	9.8%	14.4%	12.9%	20.5%	15.7%	20.0%	19.0%	11.2%	44.0%	28.3%	6.0%																
Singapore		91.0%	73.2%	56.2%	58.3%	61.9%	57.1%	65.1%	33.7%	11.4%	12.4%	19.3%	29.5%	6.9%	16.1%	27.1%	8.5%	16.1%	40.9%	31.8%	7.4%																
South Korea		80.8%	58.7%	53.4%	47.0%	53.0%	43.8%	46.8%	28.0%	15.9%	17.5%	17.6%	17.3%	9.4%	12.8%	16.8%	12.3%	11.8%	23.5%	29.4%	4.2%																
Other Asia		79.3%	67.2%	48.9%	48.6%	49.3%	35.2%	46.0%	23.5%	21.5%	15.8%	19.7%	16.0%	6.4%	17.2%	17.3%	11.9%	9.1%	32.7%	24.3%	5.3%																
AUSTRALASIA		67.7%	56.6%	45.5%	46.0%	46.9%	48.3%	48.0%	26.1%	18.2%	20.3%	19.8%	14.9%	8.6%	16.6%	14.3%	11.7%	10.9%	20.3%	25.0%	6.0%																
Australia		67.6%	57.5%	44.9%	48.0%	47.1%	48.7%	48.6%	26.9%	18.0%	20.9%	20.5%	15.0%	8.8%	16.2%	14.4%	11.9%	10.8%	18.0%	25.5%	6.7%																
New Zealand		68.6%	52.6%	48.4%	36.2%	46.2%	46.3%	45.0%	22.0%	19.4%	17.3%	16.7%	14.4%	7.8%	18.8%	13.4%	10.7%	11.2%	31.0%	22.9%	2.5%																
Other Australia		4.9%	4.9%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%															
CENTRAL & SOUTH AMERICA		83.8%	65.3%	67.8%	74.8%	73.6%	54.9%	68.6%	33.9%	26.4%	23.9%	32.5%	22.5%	12.8%	12.0%	24.5%	7.9%	15.5%	11.9%	33.8%	3.9%																
Argentina		76.1%	57.7%	56.5%	62.6%	60.3%	52.6%	62.2%	28.0%	27.7%	25.2%	29.9%	17.8%	17.1%	15.1%	18.6%	6.4%	18.9%	13.0%	25.8%	6.7%																
Brazil		85.5%	67.2%	71.6%	78.8%	76.3%	56.0%	70.0%	36.0%	26.4%	24.3%	33.7%	23.4%	13.6%	11.3%	25.8%	6.7%	15.0%	11.3%	35.9%	3.1%																
Chile		77.9%	52.6%	65.8%	61.6%	68.3%	37.9%	65.1%	35.7%	24.7%	22.3%	29.9%	24.1%	8.9%	14.9%	14.0%	8.5%	7.2%	22.2%	30.5%	0.0%																
Other Central & South America		78.7%	61.6%	46.9%	58.3%	65.1%	55.5%	63.3%	21.3%	26.8%	20.9%	26.6%	18.5%	5.5%	13.9%	22.6%	17.7%	19.8%	10.9%	25.0%	9.8%																
EUROPE		79.4%	70.7%	64.4%	59.0%	51.9%	60.5%	61.3%	39.2%	25.7%	30.6%	32.0%	22.6%	20.0%	25.3%	28.0%	17.5%	14.3%	34.8%	35.7%	11.5%																
Austria		82.5%	77.5%	73.2%	75.2%	66.5%	74.9%	71.7%	53.6%	40.2%	46.3%	34.5%	21.5%	23.1%	29.4%	44.4%	19.7%	18.4%	47.6%	50.2%	11.5%																
Belgium		79.2%	73.5%	64.0%	65.5%	49.9%	68.1%	68.1%	44.0%	27.1%	35.7%	33.1%	26.1%	24.4%	32.3%	29.4%	19.9%	16.9%	27.6%	42.5%	15.2%																
Denmark		72.2%	81.0%	64.0%	66.6%	55.3%	58.8%	62.9%	36.0%	31.7%	34.6%	29.2%	26.9%	24.1%	25.1%	23.3%	24.7%	22.4%	35.1%	31.2%	12.9%																
Finland		81.7%	76.8%	68.8%	64.4%	58.2%	65.6%	65.0%	46.2%	45.3%	44.2%	27.9%	26.3%	26.3%	37.9%	35.9%	28.5%	18.1%	48.3%	41.9%	16.7%																
France		78.8%	73.6%	67.2%	62.8%	57.0%	62.5%	67.7%	43.0%	28.8%	32.2%	34.5%	27.7%	18.9%	25.8%	30.0%	18.5%	14.2%	37.6%	39.0%	12.0%																
Germany		82.8%	73.8%	67.9%	63.8%	57.4%	63.1%	63.3%	43.7%	24.9%	37.2%	33.7%	23.5%	23.7%	26.4%	30.9%	16.8%	14.4%	32.1%	38.4%	12.7%																
Ireland		79.9%	62.6%	65.9%	51.2%	48.3%	62.4%	55.8%	35.3%	30.3%	36.5%	25.0%	25.6%	15.6%	29.5%	28.0%	17.1%	16.3%	42.2%	31.9%	11.6%																
Italy		78.8%	74.8%	63.5%	64.1%	46.4%	60.2%	71.3%	37.0%	25.8%	28.5%	29.3%	18.2%	16.4%	28.9%	24.1%	15.3%	16.1%	25.0%	35.8%	7.9%																
The Netherlands		77.3%	71.3%	62.3%	61.5%	48.8%	60.4%	58.1%	34.9%	21.8%	30.1%	33.9%	21.4%	25.0%	26.6%	27.4%	19.0%	14.1%	33.3%	34.8%	12.4%																
Norway		86.4%	76.7%	75.7%	67.4%	55.3%	7																														

*Caution: small base size

APPENDIX

EASTERN CAPE TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

*Cautions: small base sizes

APPENDIX

KwaZULU-NATAL TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

*Caution: small base size

APPENDIX

MPUMALANGA TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

TOTAL 85.2%

APPENDIX

LIMPOPO TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

TOTAL 65.8% 20.1%

APPENDIX

NORTH WEST TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

*Caution: small base size

APPENDIX

NORTHERN CAPE TOP 20 ATTRACTIONS BY SOURCE MARKETS - Q4 2024

166 *Journal of Health Politics, Policy and Law*

APPENDIX

FREE STATE TOP 20 ATTRACTIONS BY SOURCE MARKETS - 2024

*Caution: small base size



Inspiring new ways



CONTACT

Technical Enquiries: Mukovhe Netshiava

Tel: +27 11 8953152

Email: mukovhe@southafrica.net

Produced by South African Tourism

THANK YOU