



Euromonitor  
International

# Travel in South Africa

October 2024

Table of Contents

EXECUTIVE SUMMARY

Increased confidence influences growth of travel flows across South Africa.  
Airlines: Low cost carrier offer remains limited to several players  
Hotels: Partnerships with online travel agents boost occupancy for hotels  
Booking: Online bookings on the rise  
What next for travel?

MARKET DATA

- Table 1 - Surface Travel Modes Sales: Value 2019-2024
- Table 2 - Surface Travel Modes Online Sales: Value 2019-2024
- Table 3 - Forecast Surface Travel Modes Sales: Value 2024-2029
- Table 4 - Forecast Surface Travel Modes Online Sales: Value 2024-2029
- Table 5 - In-Destination Spending: Value 2019-2024
- Table 6 - Forecast In-Destination Spending: Value 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inbound arrivals continue to show significant improvement  
Diverse tourist attractions remain key for visitors to South Africa

PROSPECTS AND OPPORTUNITIES

Tourism flows expected to grow over the forecast period, driven by established and new source markets  
Weaker local currency expected to make it more affordable to visit South Africa

CATEGORY DATA

- Table 7 - Inbound Arrivals: Number of Trips 2019-2024
- Table 8 - Inbound Arrivals by Country: Number of Trips 2019-2024
- Table 9 - Inbound City Arrivals 2019-2024
- Table 10 - Inbound Tourism Spending: Value 2019-2024
- Table 11 - Forecast Inbound Arrivals: Number of Trips 2024-2029
- Table 12 - Forecast Inbound Arrivals by Country: Number of Trips 2024-2029
- Table 13 - Forecast Inbound Tourism Spending: Value 2024-2029
- Table 14 - Domestic Tourism by Destination: Number of Trips 2019-2024
- Table 15 - Domestic Spending: Value 2019-2024
- Table 16 - Forecast Domestic Tourism by Destination: Number of Trips 2024-2029
- Table 17 - Forecast Domestic Spending: Value 2024-2029
- Table 18 - Outbound Departures: Number of Trips 2019-2024
- Table 19 - Outbound Departures by Destination: Number of Trips 2019-2024
- Table 20 - Outbound Tourism Spending: Value 2019-2024
- Table 21 - Forecast Outbound Departures: Number of Trips 2024-2029
- Table 22 - Forecast Outbound Departures by Destination: Number of Trips 2024-2029
- Table 23 - Forecast Outbound Spending: Value 2024-2029

KEY DATA FINDINGS

2024 DEVELOPMENTS

Flysafair continues to strengthen position with strategic expansion and route consolidation  
Foreign airlines compete for share within full service carriers in South Africa

PROSPECTS AND OPPORTUNITIES

Domestic tourism expected to boost growth of low cost carriers  
Global carriers to remain key for airlines in South Africa

CATEGORY DATA

- Table 24 - Airlines Sales: Value 2019-2024
- Table 25 - Airlines Online Sales: Value 2019-2024
- Table 26 - Airlines: Passengers Carried 2019-2024
- Table 27 - Airlines NBO Company Shares: % Value 2019-2023
- Table 28 - Non-Scheduled Carriers Brands by Key Performance Indicators 2024
- Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2024
- Table 30 - Full Service Carriers Brands by Key Performance Indicators 2024
- Table 31 - Forecast Airlines Sales: Value 2024-2029
- Table 32 - Forecast Airlines Online Sales: Value 2024-2029

Lodging (Destination) in South Africa

KEY DATA FINDINGS

2024 DEVELOPMENTS

Occupancy continues to improve across different lodging facilities  
Short-term rentals continue to strengthen position within local accommodation

PROSPECTS AND OPPORTUNITIES

Prevailing economic conditions expected to influence accommodation choice  
International visitors are set to drive growth for luxury and upscale hotel occupancy

CATEGORY DATA

- Table 33 - Lodging (Destination) Sales: Value 2019-2024
- Table 34 - Lodging (Destination) Online Sales: Value 2019-2024
- Table 35 - Hotels Sales: Value 2019-2024
- Table 36 - Hotels Online Sales: Value 2019-2024
- Table 37 - Other Lodging Sales: Value 2019-2024
- Table 38 - Other Lodging Online Sales: Value 2019-2024
- Table 39 - Lodging (Destination) Outlets: Units 2019-2024
- Table 40 - Lodging (Destination) Rooms: Number of Rooms 2019-2024
- Table 41 - Lodging (Destination) by Incoming vs Domestic: % Value 2019-2024
- Table 42 - Hotels NBO Company Shares: % Value 2019-2023
- Table 43 - Hotel Brands by Key Performance Indicators 2024
- Table 44 - Forecast Lodging (Destination) Sales: Value 2024-2029
- Table 45 - Forecast Lodging (Destination) Online Sales: Value 2024-2029
- Table 46 - Forecast Hotels Sales: Value 2024-2029
- Table 47 - Forecast Hotels Online Sales: Value 2024-2029
- Table 48 - Forecast Other Lodging Sales: Value 2024-2029
- Table 49 - Forecast Other Lodging Online Sales: Value 2024-2029
- Table 50 - Forecast Lodging (Destination) Outlets: Units 2024-2029

Booking in South Africa

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Strategic partnerships key to share growth in South Africa  
Established players continue to thrive on goodwill and reputation

## PROSPECTS AND OPPORTUNITIES

Online travel intermediaries set to drive growth of internet bookings  
Travellers expected to gain confidence in making online bookings

## CATEGORY DATA

Table 51 - Booking Sales: Value 2019-2024  
Table 52 - Business Travel Sales: Value 2019-2024  
Table 53 - Leisure Travel Sales: Value 2019-2024  
Table 54 - Travel Intermediaries NBO Company Shares: % Value 2019-2024  
Table 55 - Forecast Booking Sales: Value 2024-2029  
Table 56 - Forecast Business Travel Sales: Value 2024-2029  
Table 57 - Forecast Leisure Travel Sales: Value 2024-2029

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/travel-in-south-africa/report](https://www.euromonitor.com/travel-in-south-africa/report).