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# **Relevant Tourism Statistics & Perspectives with Specific Reference to Mpumalanga**

## **December 2025**

## **COMPILED BY: RESEARCH & DEVELOPMENT**

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## KEY FINDINGS

- Data for the first nine months of 2025 shows international tourism arrival numbers 3% above the pre-pandemic levels.
- An estimated 1.1 billion international tourist arrivals (overnight visitors) were recorded in the first nine months of 2025, 5% more than the corresponding period of 2024.
- International arrivals in South Africa improved to reach 84.8% of 2020 levels in October 2025.
- Tourist accommodation income for 2024 was 11.9% higher than 2023 and the first nine months of 2025 was 10.2% higher than the corresponding nine months in 2024
- Mpumalanga was the province that recorded the second highest number of foreign arrivals in 2024, with a share of 23.8% of South Africa's foreign arrivals.
- Mpumalanga's share increased between 2015 and 2024 and the 2024 foreign arrival numbers was the highest ever recorded for Mpumalanga.
- The 23.8% share was also a healthy increase from the 19.0% in 2023.
- The largest share of foreign arrivals to Mpumalanga originated from Mozambique (62.6%), Eswatini (17.3%) and USA (3.3%).
- In 2024, Mpumalanga (7.8%) captured the third largest share of total foreign direct spending (TFDS) among the provinces. The value of TFDS in Mpumalanga declined by R335 million between 2023 and 2024.
- In 2024, the average TFDS by tourist in Mpumalanga was the highest among tourists from Asia and Australasia with R11 556 per tourist.
- In 2024, international tourists spent some 20.9 million bednights in Mpumalanga, which was equal to 18.3% of total bednights in South Africa and the second largest share.
- In 2024, the average length of stay by foreign tourists in Mpumalanga was 10.2 days, which was the seventh longest/third shortest among the provinces.
- Mpumalanga was the sixth most frequented destination province with a 6.7% share of domestic day trips in 2024.
- In 2024, Mpumalanga (10.3%) was also the sixth most frequented destination province with respect to domestic overnight trips.
- According to simulations, tourism's direct contribution of Mpumalanga's GDP in 2024 ranges from 3.0% to 3.5% depending on the underlying assumption.
- Mpumalanga's tourism direct employment contribution in 2024 ranges from 4.6% to 4.7% depending on the underlying assumptions.

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## 1. INTRODUCTION

South Africa's tourism attractiveness and to a larger extent Mpumalanga's lies in its diversity. Some of the features which make South Africa an incredibly attractive tourism proposition include: accessible wildlife, varied and impressive scenery, unspoiled wilderness areas, diverse cultures and traditions in particular African township; as well as a generally sunny and warm climate.

Tourism carries the potential to create opportunities for the entrepreneurs and breeds unique small and medium businesses. Tourism industry helps protect the environment and creates unique economic linkages with amongst others agriculture, light manufacturing (arts, crafts, and souvenirs) and the services sector (health, beauty, entertainment, and banking). Importantly for South Africa, tourism creates decent and sustainable work; it is labour intensive and presents relatively low barriers to entry for entrepreneurs in terms of skills and other competencies.

The purpose of this research report is to provide the Mpumalanga policy makers with relevant statistics and perspectives on tourism with specific reference to Mpumalanga. The report will focus on the status of international and domestic tourism in Mpumalanga, the contribution of tourism to the Mpumalanga economy, as well as the key interventions to boost the industry. The main data sources are South Africa Tourism (SA Tourism), Stats SA, Department of Tourism, United Nations World Tourism Organisation (UNWTO), as well as the World Travel and Tourism Council (WTTC).

## 2. GLOBAL TOURISM

### *International situation*

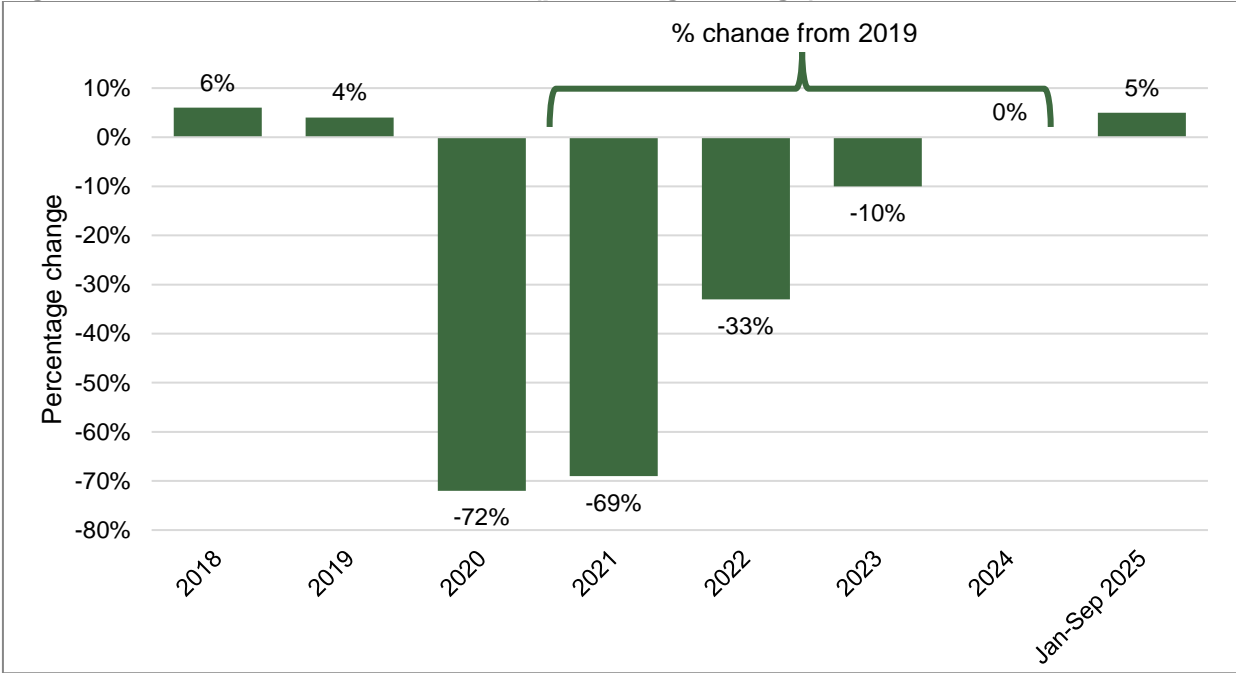
The COVID-19 pandemic has had a devastating effect on the global tourism industry. It is estimated by the UNWTO that 2020 saw a loss of more than 1 billion international tourist arrivals the world over. International tourist arrivals declined by 72% in 2020 and in 2021 it was 69% below the 2019 value. Revised data for 2022 and 2023 shows that arrival numbers was 33% and 10% below 2019 arrivals, respectively. The global arrival numbers for 2024 was equal to the arrival numbers of 2019.

An estimated 1.1 billion international tourist arrivals (overnight visitors) were recorded in the first nine months of 2025, about 5% more than the same period in 2024, or 3% above the pre-pandemic year of 2019. The results reflect sustained travel demand throughout the year despite high inflation in tourism services and mixed traveller confidence due to geopolitical and trade tensions.

Africa saw a 10% increase in arrivals these first nine months of 2025, according to limited available data. Both North Africa (+11%) and Sub-Saharan Africa (+10%) recorded double-digit growth in arrivals. Europe, the world's largest destinations region, saw 625 million international

tourists between January and September 2025, a 4% increase from the same months in 2024. The Americas recorded 2% growth through September, with a 3% increase in Q1 and Q2. Arrivals in the Middle East grew 2% in January-September 2025 compared to the same period in 2024. Arrivals in Asia and the Pacific grew 8% in the first nine months of 2025, reaching 90% of pre-pandemic numbers as the region continues to recover.

**Figure 1: International tourist arrivals (percentage change) 2018-2025**



**Source: UNWTO – World Tourism Barometer, November 2025**

*National situation*

In 2020, international tourist arrivals in South Africa were 73% below the pre-pandemic levels of 2019 and in 2021 the international arrivals were 78% below the 2019 levels. International arrivals in South Africa improved to reach 56% of 2019 levels in 2022, 83% in 2023 and in the first seven months of 2024 international arrivals improved further to reach 87% of the comparative 2019 levels.

In 2020, South Africa’s loss in tourism export revenue amounted to US\$5.9 billion. In 2021, foreign visitor spend declined by another US\$400 million to US\$2.1 billion or just 23% of the 2019 level. Although tourism export revenue recovered to US\$5.7 billion in 2023, it was still 32% below the 2019 level.

In 2020, the national tourism GDP experienced a significant decline of approximately 43.4%<sup>1</sup>, resulting in a loss of around R91 billion. However, in 2021, the national tourism GDP rebounded, increasing by 18.8%<sup>2</sup> (by approximately R22 billion), and continued to grow by 67.5% in 2022.

<sup>1</sup> Stats SA estimate  
<sup>2</sup> Stats SA estimate

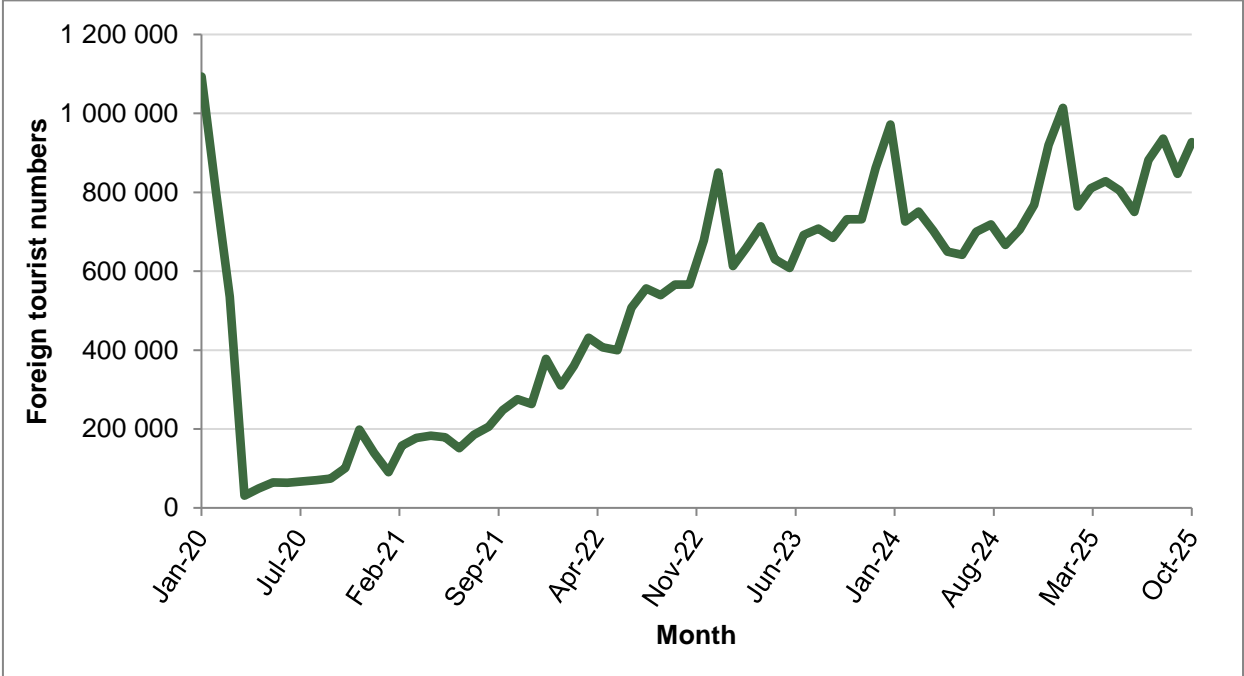
This recovery in 2022 led to tourism’s GDP contribution exceeding the pre-pandemic level of 2019 by roughly R26 billion.

In 2019, the tourism sector supported an estimated 777 686 direct jobs in South Africa. According to Stats SA, the COVID-19 pandemic and subsequent travel restrictions caused a 42% reduction in these jobs in 2020. It is estimated that tourism related employment increased by 8% in 2021 and by an additional 49% in 2022, reaching 733 385 jobs. Despite this recovery, the tourism sector still employed approximately 44 000 fewer people in 2022 compared to 2019.

*Foreign tourist arrivals*

Data collected by the Department of Home Affairs indicates a significant decline in foreign tourist arrival numbers between January 2020 and April 2020, as illustrated in Figure 2. This sharp decrease can be attributed to the global travel restrictions and lockdowns imposed due to the COVID-19 pandemic. From May 2020 onwards, there was a gradual increase in foreign tourist numbers, which continued up to October 2025. Despite the upward trend, the latest figures (October 2025 = 927 426) represent only 84.8% of foreign tourist numbers in January 2020. This data underscores the ongoing challenges faced by the tourism sector in recovering to pre-pandemic levels, highlighting the need for strategic initiatives to boost international travel and restore confidence among potential tourists.

**Figure 2: Number of foreign tourist arrivals, 2020 - October 2025**



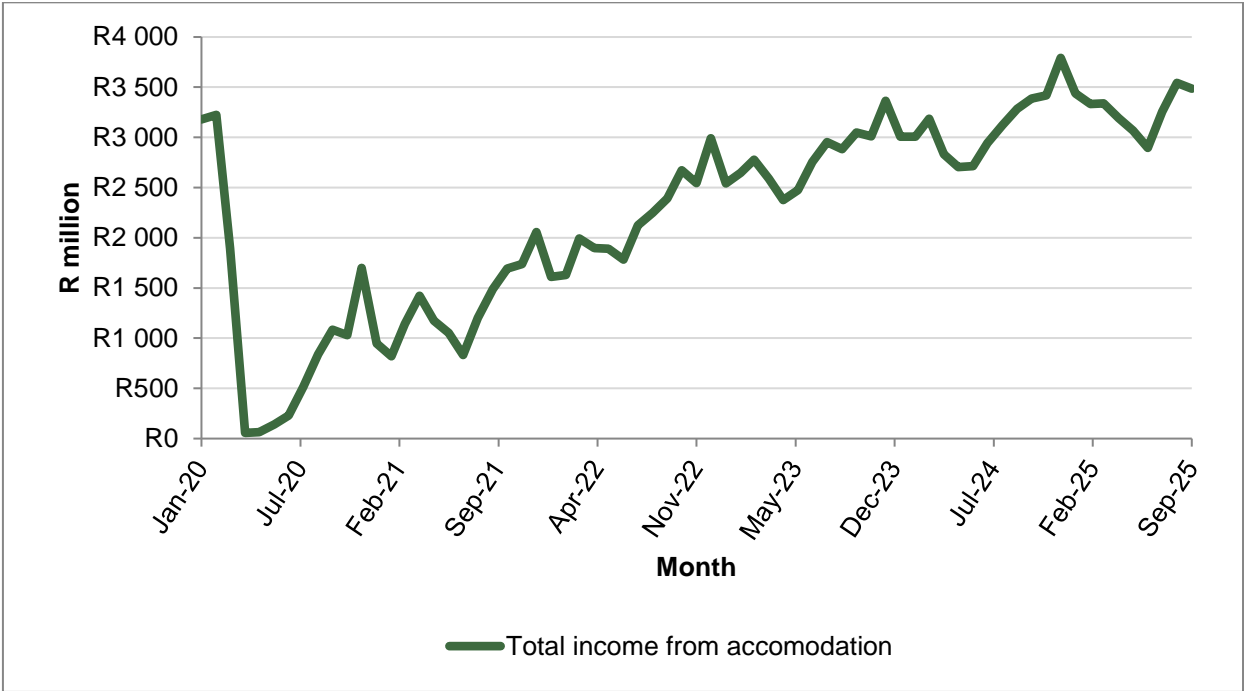
**Source: Stats SA – International Tourism, October 2025**

*Most recent accommodation data*

According to the *Tourist accommodation* publication released by Stats SA, the total income for the tourist accommodation industry in 2020 was 61.6% lower than in 2019, primarily due to the

COVID-19 pandemic. In the subsequent years, the sector showed signs of recovery, with total income from tourist accommodation increasing by 11.5% in 2021, 65.5% in 2022 and 29.7% in 2023. Notably, the tourist accommodation income for 2024 was 11.9% higher than 2023 and the first nine months of 2025 was 10.2% higher than the corresponding nine months in 2024 (Figure 3). These figures highlight a positive trend in the sector’s recovery, although it remains crucial to implement strategic measures to sustain and accelerate this growth.

**Figure 3: Tourist accommodation income in current prices (R million), 2020–September 2025**



Source: Stats SA – Tourist accommodation, September 2025

**3. TOURISM IN MPUMALANGA**

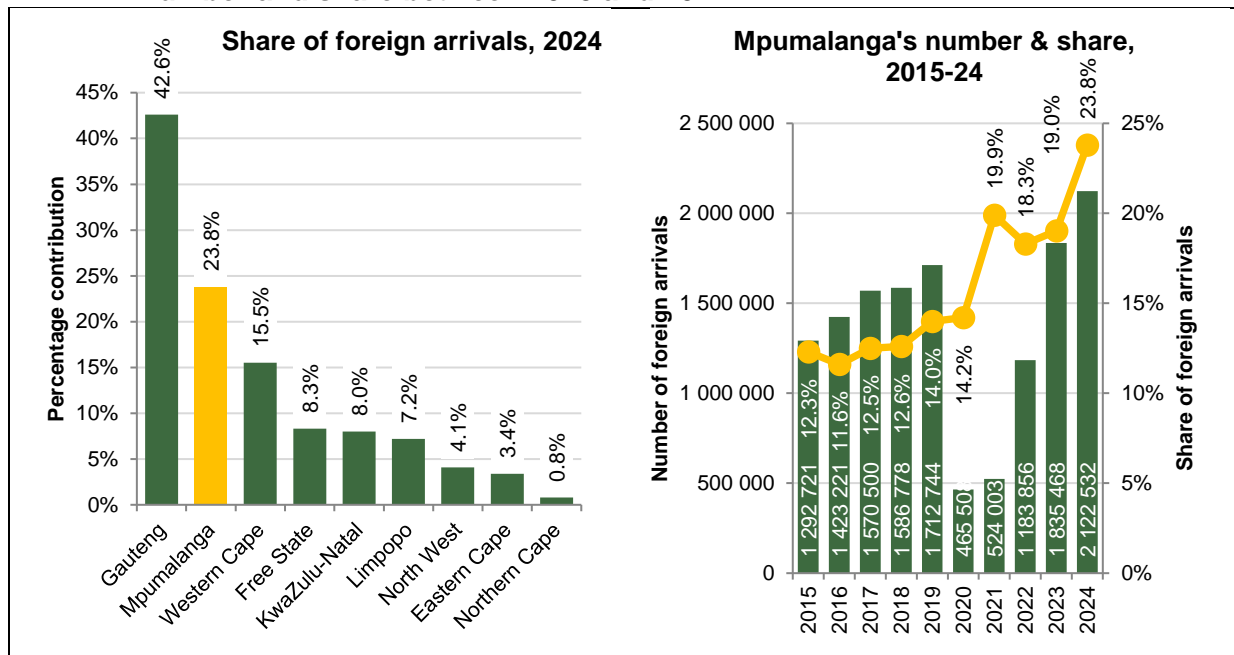
**3.1 International tourism in Mpumalanga**

*Foreign arrivals*

According to South Africa Tourism’s *Tourism Performance Report 2024*, Mpumalanga was the province that recorded the second highest number of foreign arrivals in 2024, with a share of 23.8% of South Africa’s foreign arrivals (Figure 4). In 2024, Gauteng (42.6%) held the largest share of foreign arrivals, followed by Mpumalanga (23.8%) and Western Cape (15.5%). Mpumalanga’s share increased between 2015 and 2024. The 23.9% share was higher than the 19.9% share in 2021 and highest on display.

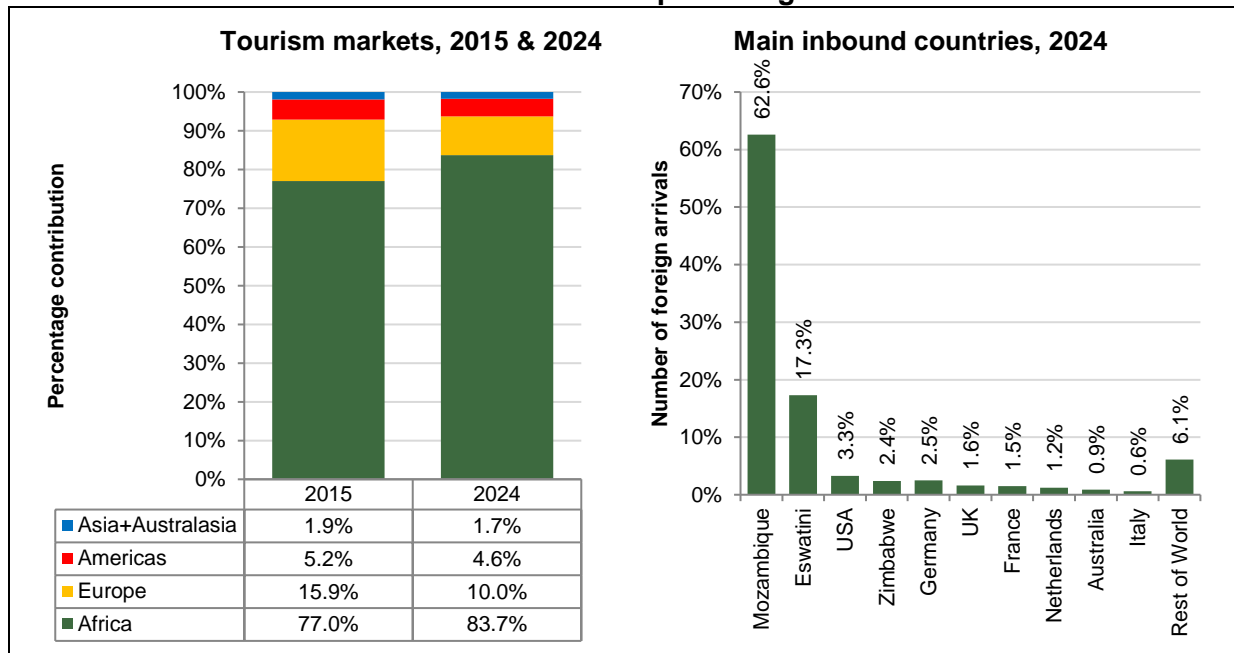
Mpumalanga’s main inbound tourism markets are Africa and Europe. Figure 5 displays the shares of Mpumalanga’s main tourism markets in 2015 and 2024. It is clear that Africa’s share increased between 2015 and 2024, and the shares of the other regions declined. Figure 5 shows that the largest share of foreign arrivals to Mpumalanga originated in Mozambique (62.6%) followed by arrivals from Eswatini (17.3%) and the USA (3.3%).

**Figure 4: Foreign arrivals per province in 2024 & change in Mpumalanga’s foreign arrival number and share between 2015 and 2024**



**Source: South Africa Tourism – Tourism Performance Report 2024**  
**Note: Multiple provinces may be visited, sum over 100%**

**Figure 5: Contribution of Mpumalanga’s inbound tourism markets in 2015 and 2024 & 10 main inbound tourism countries to Mpumalanga in 2024**



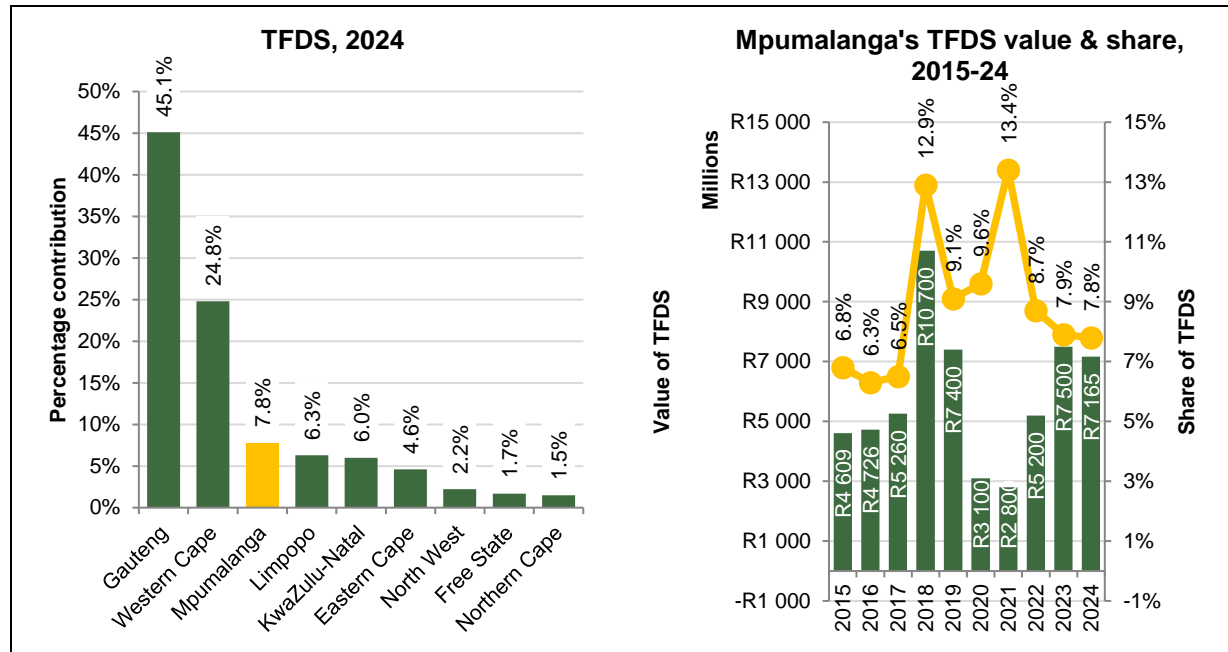
**Source: South Africa Tourism – Tourism Performance Report 2024**

*Total foreign direct spending (TFDS)*

In 2024, TFDS in Mpumalanga was approximately R7.2 billion or 7.8% of TFDS in South Africa. In 2024, Gauteng (45.1%) captured the largest share of TFDS among the provinces and Mpumalanga the third largest share (Figure 6). The value of TFDS in Mpumalanga increased between 2015 and 2024 and the share also increased over the same period. The value of TFDS

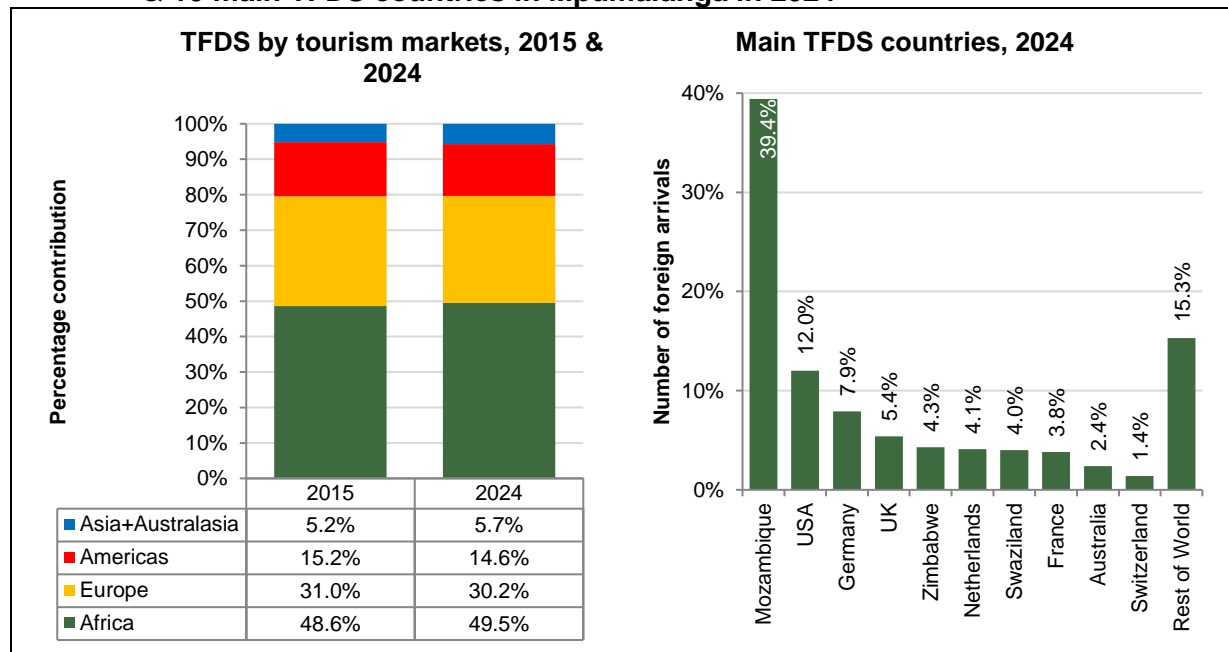
in Mpumalanga, however, declined by R335 million between 2023 and 2024 and the share declined marginally from 7.9% in 2023 to 7.8% in 2024. It is concerning that Mpumalanga's share of TFDS declined from 13.4% in 2021 to the latest 7.8%.

**Figure 6: TFDS per province in 2024 & change in Mpumalanga's TFDS value and share between 2015 and 2024**



Source: South Africa Tourism – Tourism Performance Report 2024

**Figure 7: TFDS contribution by Mpumalanga's inbound tourism markets in 2015 and 2024 & 10 main TFDS countries in Mpumalanga in 2024**



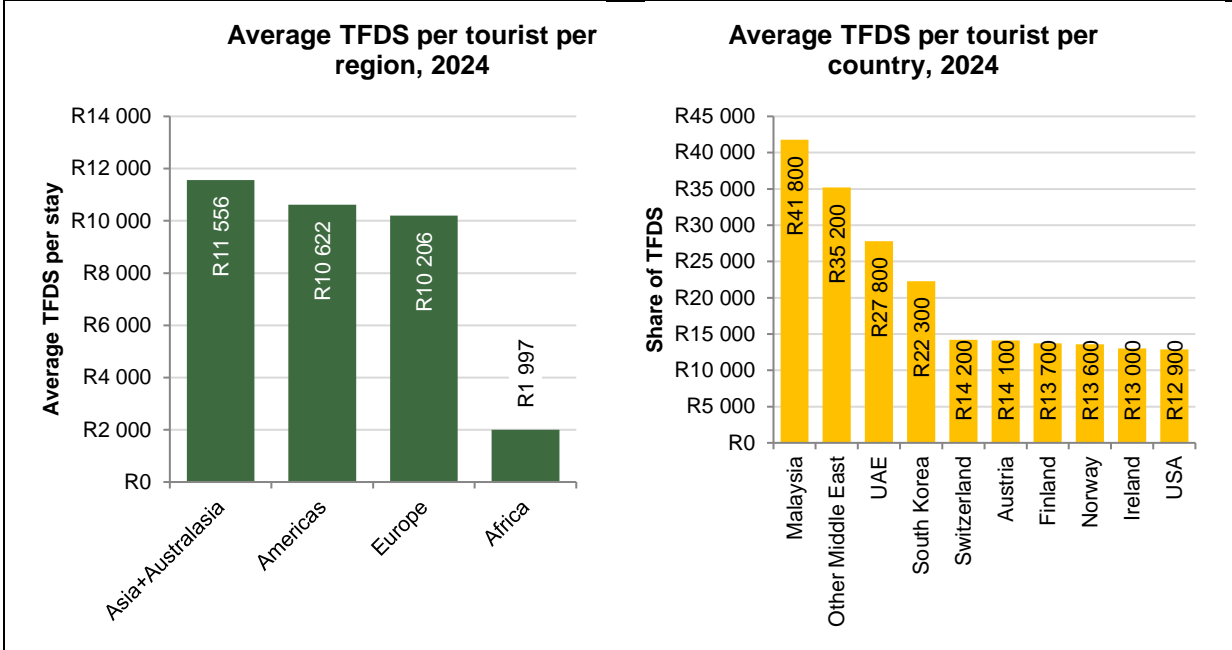
Source: South Africa Tourism – Tourism Performance Report 2024

In 2015, Africa was the primary inbound tourism market for Mpumalanga in terms of Total Foreign Direct Spending (TFDS), as illustrated in Figure 7. By 2024, Africa cemented its place with a 49.5% share of TFDS. During the period from 2015 to 2024, Africa's share of TFDS experienced

a notable increase. In contrast, the shares of Europe and the Americas, saw slight declines. Africa continued to dominate in terms of tourist arrivals to Mpumalanga in 2024, as shown in Figure 5, and it did maintain the same level of dominance in TFDS when compared to tourists from other regions.

In 2024, the average TFDS by tourist per stay in Mpumalanga was the highest among tourists from Asia and Australasia with R11 556 per tourist. Average TFDS by tourists from the Americas was R10 622 per tourist, R10 206 per tourist from Europe, with only R1 997 per tourist from Africa (Figure 8). The highest average TFDS by tourist in Mpumalanga were from tourists from Malaysia (R41 800) and was followed by tourists from other Middle East (R35 200). No country from Africa appears in the top ten countries by average TFDS, compared with the three African countries among the ten main TFDS countries (Figure 7).

**Figure 8: Average TFDS per regional tourist in 2024 & TFDS per tourist per country, 2024**



**Source: South Africa Tourism – Tourism Performance Report 2024**

*Bednights*

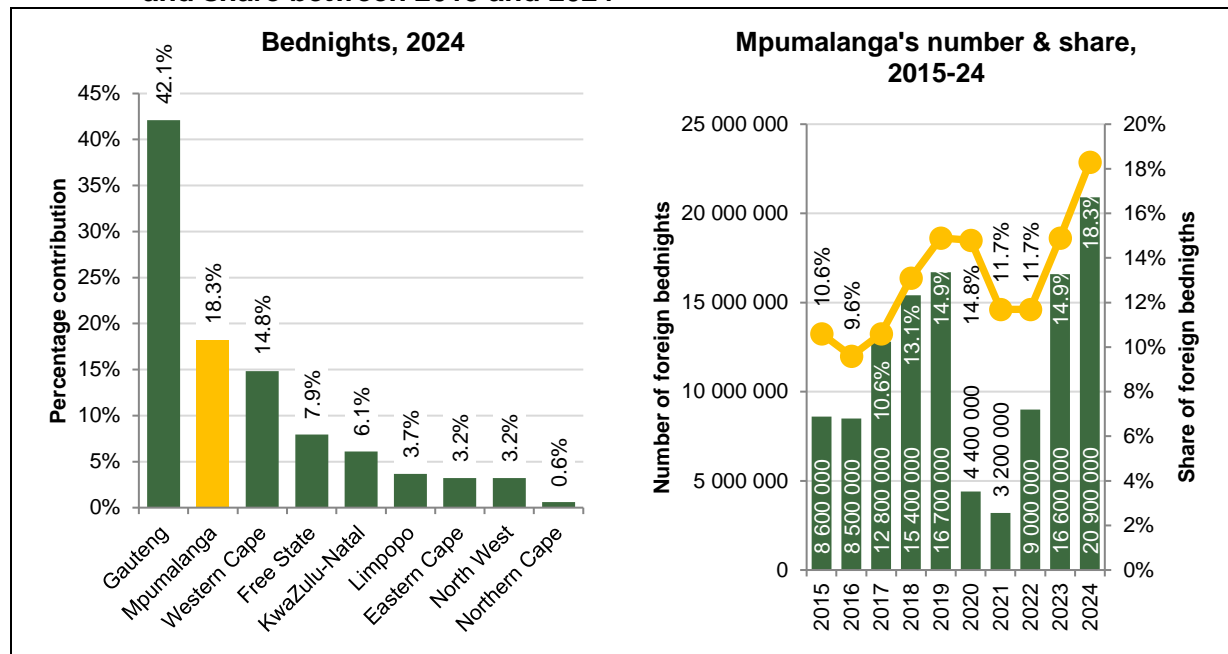
In 2024, international tourists spent some 20.9 million bednights in Mpumalanga. The 20.9 million bednights were equal to 18.3% of total bednights in South Africa and the second largest share amongst the nine provinces (Figure 9). Mpumalanga’s share increased from 10.6% in 2015 to 18.3% in 2024. The number of bednights in Mpumalanga increased from 8.6 million in 2015 to 20.9 million in 2024.

*Length of stay*

In 2024, the average length of stay by foreign tourists was 13.3 nights in South Africa, which was an increase from an average of 8.8 nights in 2015. In 2024, Eastern Cape and Gauteng, jointly, recorded the longest average length of stay at 13.1 nights and Limpopo the shortest at 6.8 nights.

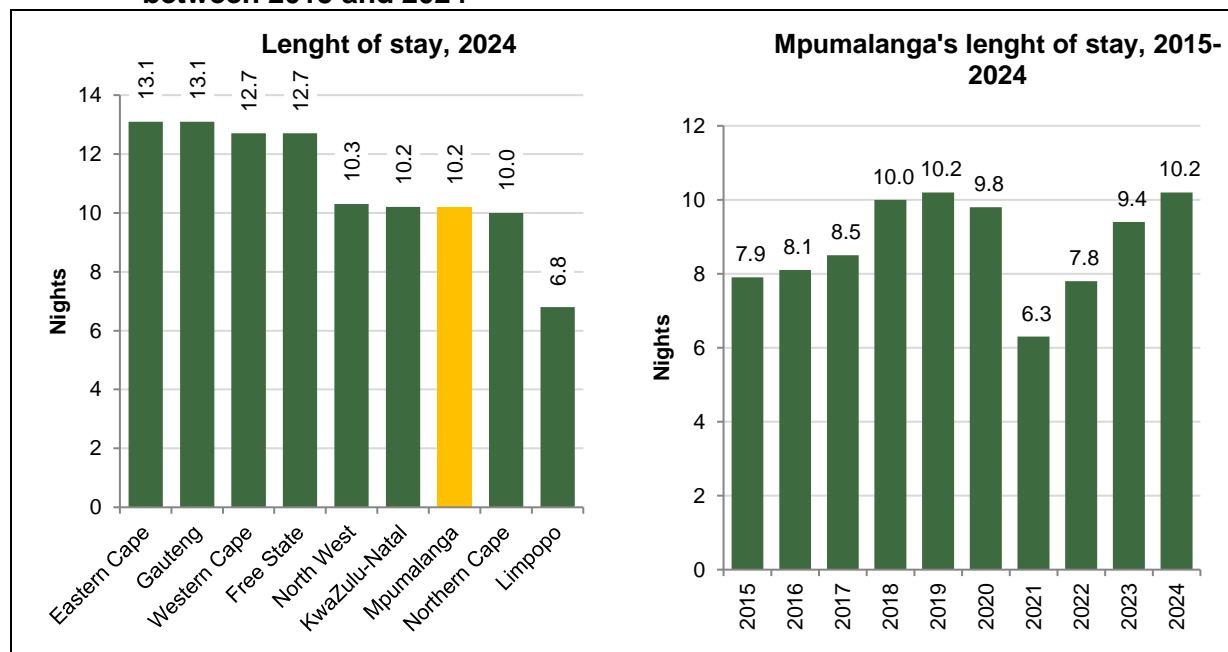
The average length of stay in Mpumalanga was 10.2 nights, which was the joint sixth longest/third shortest stay among the provinces. The average length of stay in Mpumalanga increased from 7.9 nights in 2015 to 10.2 nights in 2024 (Figure 10).

**Figure 9: Bednights per province in 2024 & change in Mpumalanga’s bednights number and share between 2015 and 2024**



Source: South Africa Tourism – Tourism Performance Report 2024

**Figure 10: Length of stay per province in 2024 & change in Mpumalanga’s length of stay between 2015 and 2024**



Source: South Africa Tourism – Tourism Performance Report 2024

### 3.2 Domestic tourism in Mpumalanga

According to Statistics South Africa’s *Domestic Tourism Survey 2024*, approximately 33.5 million day trips and 26.2 million overnight trips were undertaken in South Africa during 2024. More or

less one fifth of day trips were undertaken to Western Cape (24.1%), followed by Gauteng (22.7%) and Limpopo (10.3%). Mpumalanga was the sixth most frequented destination province with a 6.7% share of day trips in 2024 (Table 1). In terms of overnight trips, Limpopo (17.6%) was the top overnight destination of domestic tourists in 2024, followed by KwaZulu-Natal with a 16.6% share. In 2024, Mpumalanga (10.3%) was also the sixth most frequented destination province with respect to domestic overnight trips.

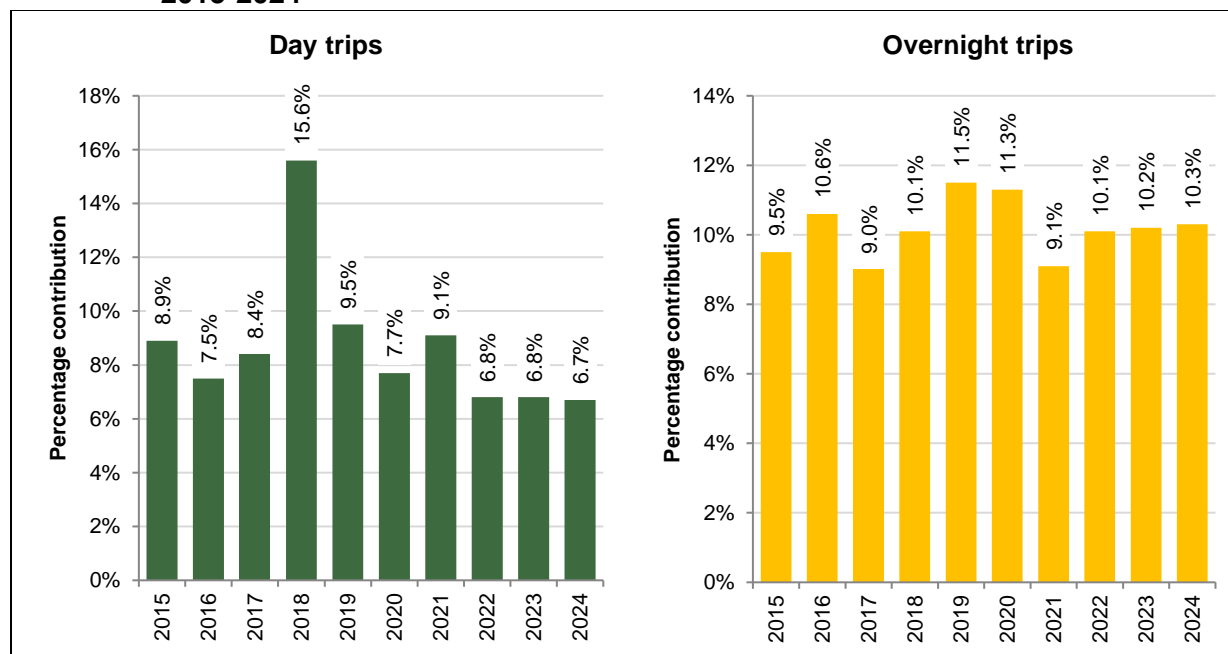
**Table 1: Domestic day and overnight trips by province of destination, 2024**

Province	% of day trips	% of overnight trips
Western Cape	24.1%	13.6%
Eastern Cape	10.2%	11.8%
Northern Cape	4.4%	4.2%
Free State	4.8%	4.5%
KwaZulu-Natal	6.5%	16.6%
North West	10.2%	6.3%
Gauteng	22.7%	14.9%
Mpumalanga	<b>6.7%</b>	<b>10.3%</b>
Limpopo	10.3%	17.6%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>

**Source: Statistics South Africa – Domestic Tourism Survey 2024**

Mpumalanga’s share of day trips declined from 8.9% in 2015 to 6.7% in 2024 (Figure 11). Between 2015 and 2024, Mpumalanga’s share as a destination of overnight trips increased from 9.5% to 10.3%. Despite the decline in the share of day trips, the region has become increasingly popular for overnight stays, reflecting a possible shift in travel preferences.

**Figure 11: Mpumalanga’s share as destination of domestic day trips and overnight trips, 2015-2024**

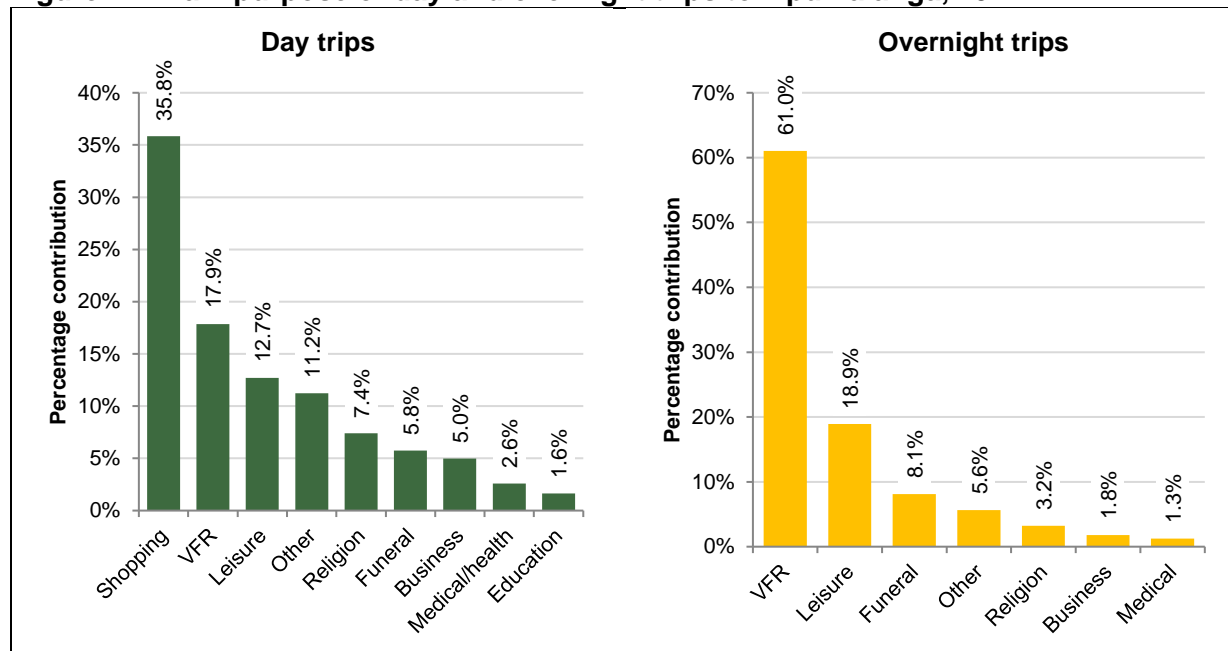


**Source: Statistics South Africa – Domestic Tourism Survey 2024**

Figure 12 displays the main purpose for which both day and overnight travellers undertook trips to Mpumalanga. In 2024, shopping (35.8%) was the main reason people travelled to

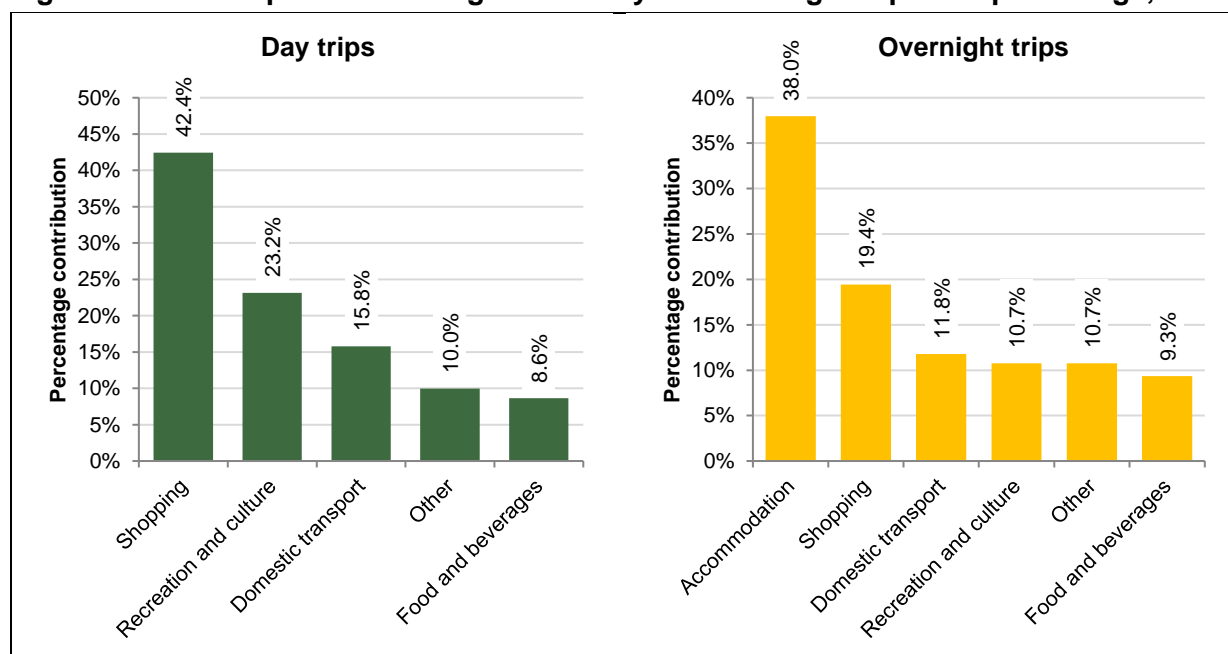
Mpumalanga on day trips, followed by visits to friends and relatives (VFR) with a share of 17.9%. In terms of overnight visits, the main purpose in Mpumalanga was to visit friends and relatives (61.0%), followed by leisure (18.9%).

**Figure 12: Main purpose of day and overnight trips to Mpumalanga, 2024**



Source: Statistics South Africa – Domestic Tourism Survey 2024

**Figure 13: Main expenditure categories of day and overnight trips to Mpumalanga, 2024**



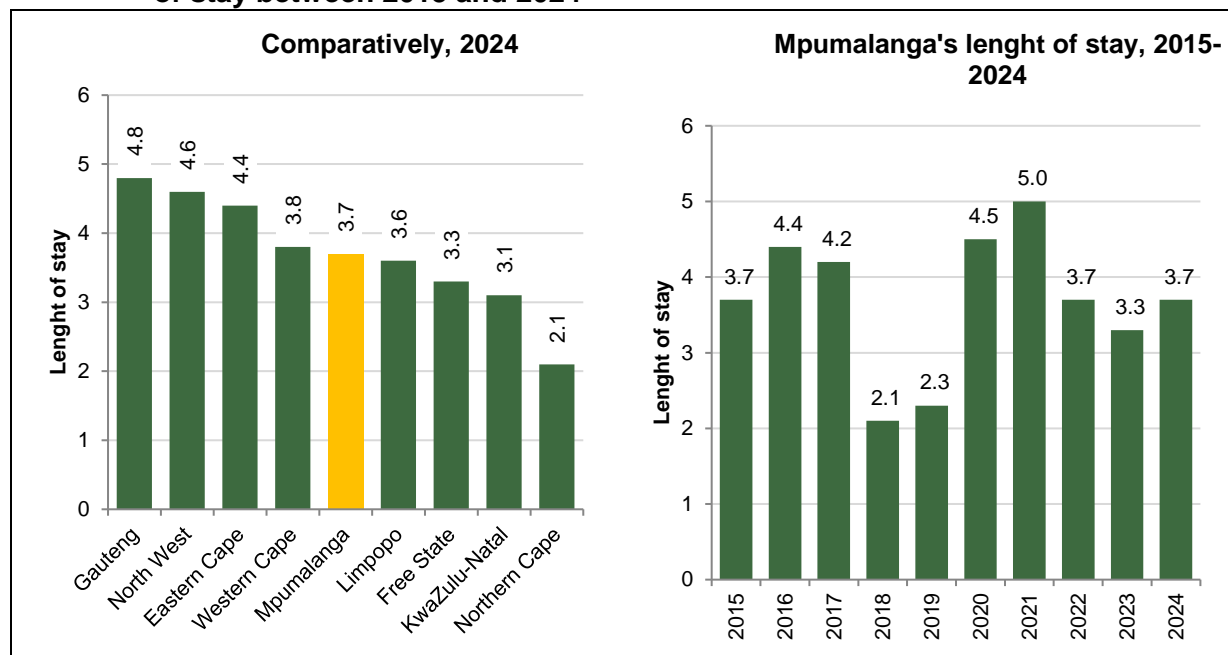
Source: Statistics South Africa – Domestic Tourism Survey 2024

Figure 13 displays the main expenditure categories on which both day and overnight travellers to Mpumalanga spent their funds. In 2024, shopping (42.4%) was the main expenditure category for people that travelled to Mpumalanga on day trips followed by expenditure on recreation and culture (23.2%). In terms of overnight visits, the main expenditure categories in Mpumalanga was

on accommodation (38.0%) followed by shopping (19.4%).

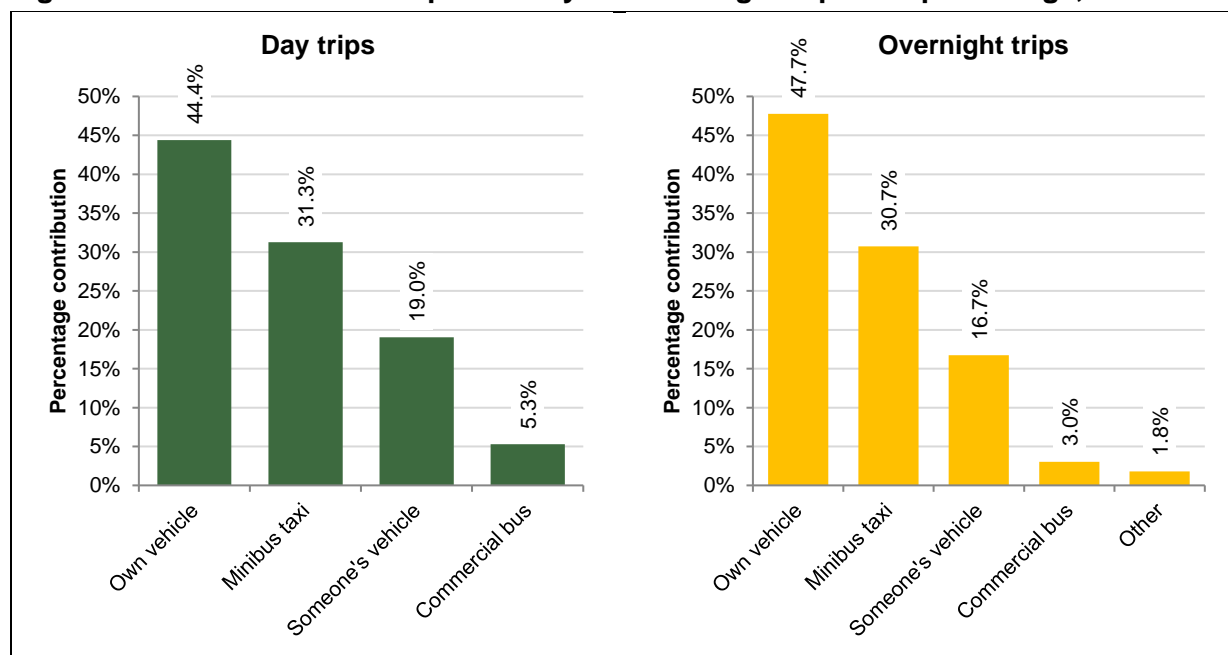
In 2024, Gauteng recorded the longest, average length of stay at 4.8 days and Northern Cape the shortest at 2.1 days (Figure 14). Although the average length of stay in Mpumalanga fluctuated over the past decade, it returned to 3.7 nights in 2024 - the same as in 2015.

**Figure 14: Length of overnight stay per province in 2023 & change in Mpumalanga’s length of stay between 2015 and 2024**



Source: South Africa Tourism – Tourism Performance Report 2024

**Figure 15: Main mode of transport of day and overnight trips to Mpumalanga, 2024**



Source: Statistics South Africa – Domestic Tourism Survey 2024

In 2024, the majority of visitors to Mpumalanga travelled by their own vehicle, accounting for 44.4% of day trips and 47.7% of overnight trips. The second most common mode of transport to

Mpumalanga for both types of trips was a minibus (Figure 15).

## **4. ECONOMIC CONTRIBUTION OF TOURISM**

### **4.1 Measurement of tourism's economic impact**

Although tourism is by its nature a demand-driven phenomenon, it is necessary, from a macro-economic point of view, to observe how the match between demand and supply operates, and how the latter affects the basic macro-economic variables of the country or region of reference. Within a context of macro-economic analysis, the relationship between supply and demand is best studied within the general framework of national accounts.

Internationally tourism is not measured as an industry in its own right in national accounts, because tourism is not a clearly defined industry in the International Standard Industrial Classification of all Economic Activities (ISIC). This is because industries are classified according to the goods and services they produce, while tourism is a consumption-based concept that depends on the status of the consumer.

A major reason for the difficulties in measuring the size of tourism is the fact that in the ISIC, industries are created on the basis of their activity or output, rather than on data on their customers, whereas tourism is defined by the characteristics of the tourists (customers). Furthermore, tourism consumption includes 'tourism-characteristic' (i.e. accommodation, travel services, cable cars, etc.) and 'non-tourism related' (i.e. retail trade) goods and services, which deliver their services largely to non-tourists. The key factor, to measure tourism, is to relate purchases by tourists to the total supply of these goods and services within a country or region.

The United Nations (UN) developed an instrument to measure the size of economic sectors that are not defined as industries in national accounts. Tourism was the first economic activity to use worldwide Satellite Account standards to measure its impact on national economies – as approved by the UN Statistics Division in March 2000. The Tourism Satellite Account (TSA) allows for valid comparisons with other industries and eventually from country to country and between groups of countries. With the TSA, reliable data can be gathered to measure the importance and magnitude of tourism with concepts such as contribution to gross domestic product (GDP), employment creation and tax revenue.

### **4.2 Global contribution**

The total contribution of the tourism industry includes the direct, indirect and induced contributions. The direct economic contribution by tourism primarily reflects the economic activity generated by hotels, travel agents, airlines and activities of the restaurant and leisure industries directly supported by tourists. The induced contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the tourism industry. The indirect contribution includes the GDP and jobs supported by:

- tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- government spending on tourism marketing and promotion, aviation, resort security services, sanitation services etc.;
- domestic purchases of goods and services including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines as well as IT services by travel agents.

In 2024, the total (direct, indirect and induced) contribution of tourism to GDP was estimated at 10.5% of global GDP (Table 2). It was further estimated that global tourism sustained 10.7% of total jobs.

**Table 2: Tourism contribution to global GDP (current prices), employment & exports, 2019-2024**

Indicator	2019	2020	2021	2022	2023	2024
Direct GDP contribution	3.9%	1.8%	1.8%	2.5%	3.0%	Not available
Total GDP contribution	10.4%	5.3%	6.1%	7.6%	9.1%	10.5%
Total employment	10.3%	8.3%	9.0%	9.0%	10.0%	10.7%
Tourism exports	\$1 704 billion	\$640 billion	\$731 billion	\$1 305 billion	\$1 812 billion	\$2 030 billion

**Sources: UNWTO – World Tourism Barometer, 2025  
WTTC – Global Economic Impact & Trends, 2025**

Money spent by foreign visitors to a country is a key component of the direct contribution of the tourism industry. Money spent by foreign visitors is also referred to as visitor exports. In 2024, the world generated US\$2 030 billion in visitor exports, which was equal to 6% of total global exports.

### 4.3 National contribution

#### *WTTC calculations*

The World Travel and Tourism Council (WTTC) is the global authority on the economic and social contribution of tourism. The WTTC produces annual research on tourism aligned to the United Nations (UN) methodological framework. The reports by the WTTC covers 185 countries in order to provide reliable and comparable information to assess tourism’s current and likely future contribution to economic activity and employment.

The WTTC employs the same methodology as the above mentioned to estimate the GDP contribution by tourism in South Africa. Tourism’s contribution in South Africa can therefore be compared with 184 countries to determine the comparative size and ranking of the tourism industry. In 2024, the total contribution of tourism to South Africa’s GDP was estimated at 8.9%, which was lower than the global contribution of 10.5%.

The size of total tourism employment in South Africa was 1.8 million in 2023 or 10.7% of total

jobs. The 10.7% contribution to total employment was equal to the world average contribution.

The 2024 visitor exports in South Africa was estimated at R116.5 billion which was 6.9% more than in 2023. The R116.5 billion was, however, still 27% below the 2019 value of R159.2 billion. Table 3 displays the South African tourism industry's contribution to GDP, employment and exports in 2022 and 2024.

#### *Statistics South Africa calculations*

According to the latest official TSA by Statistics South Africa (Stats SA), the direct tourism contribution of South Africa's tourism industry amounted to R208.5 billion (current prices) or 3.7% of total GDP in 2019. In 2022, the provisional direct contribution declined to 3.5%. When comparing it with other industries, tourism's 2022 contribution in current terms was larger than construction (2.5%), agriculture (3.0%) and utilities (3.3%) the three smallest industries, but smaller than transport (7.6%).

There were 777 686 persons (or 4.8% of total employment) directly engaged in producing goods and services purchased by tourists in 2019. It is estimated that direct tourism employment declined to 454 114 in 2020 and then rose again steadily to 733 385 in 2022. In 2020, tourism employed 3.0% of South Africa's employed and by 2022 this increased to 4.7%. In 2022, the three smallest employing industries were utilities (0.8% of total employment), mining (2.7%) and agriculture (5.4%). Therefore, according to the TSA results, tourism contributed more to employment, directly, than the two smallest industries combined in 2022, but less than agriculture.

**Table 3: Tourism contribution to South Africa GDP (current prices) employment & exports, 2022 & 2024**

Indicator	Stats SA 2022 Share	WTTC 2024 Share
Direct contribution to GDP	3.5%	-
Total contribution to GDP	-	8.9%
Direct contribution to employment	4.7%	-
Total contribution to employment	-	10.7%
Visitor exports	R71.1 billion	R116.5 billion

**Sources: Stats SA - TSA for South Africa, provisional 2020, 2021 and 2022  
WTTC – South Africa 2024**

Stats SA refers to visitor exports as inbound tourism expenditure. According to the TSA, the value of money spent by inbound tourist in 2019 was equal to R121.5 billion. In 2020, inbound tourism expenditure declined to R35.9 billion and increased steadily to R71.1 billion in 2022.

#### **4.4 Provincial contribution**

The current lack of sufficient baseline data of tourism supply on a provincial level makes an assessment of the supply side, and therefore a similar exercise such as the TSA by Stats SA for South Africa on a provincial basis, impossible. The WTTC also do not disaggregate their TSA simulations up to provincial level. To address the lack of an official TSA on a provincial level, the

following simulations using provincial tourism data and ratios, were developed and are presented below. The contributions will refer only to the direct contribution to GDP (current prices) and employment and not to the total (direct, indirect, and induced) contributions.

#### **4.4.1 Simulation 1**

##### *Headline national TSA ratios*

In this simulation there is no discrimination between the national and provincial tourism industries. It is assumed that the tourism industry's economic impact in Mpumalanga mirror exactly that of South Africa. In such a scenario, the 3.5% direct contribution by the tourism industry to provincial GDP at basic prices in 2022 would have been R18.6 billion in current terms.

The contribution of construction (R9.3 billion in current prices) and agriculture (R15.2 billion in current prices) would have been smaller than tourism's contribution. Therefore, tourism would have made the third smallest/seventh largest contribution to Mpumalanga's economy in 2022. If the 2022 national share is applied to the 2024 regional GDP for Mpumalanga, the direct contribution by the tourism industry to provincial GDP at basic prices in 2024 would have been R19.9 billion in current terms. Tourism would have also been the third smallest/seventh largest industry in Mpumalanga in 2024.

It is further assumed that the tourism industry's employment impact in Mpumalanga mirror exactly that of South Africa. In such a scenario, the direct jobs contribution of 4.7% in 2022, or 55 800 jobs (1 in 21 jobs), would have been larger than utilities (32 472) and smaller than transport (69 045). Therefore, tourism would have made the second smallest/eighth largest contribution to employment in Mpumalanga.

If the 2022 national share is applied to the 2024 employment number in Mpumalanga, the direct contribution by the tourism industry to provincial employment in 2024 would have been 58 300. Tourism would have been the third smallest/seventh largest employment industry in Mpumalanga in 2024. The results are summarised in Table 5.

#### **4.4.2 Simulation 2**

##### *Provincial shares of tourism spend and bednights*

The total tourist spend in Mpumalanga, according to South Africa Tourism, was R15.1 billion or 9.5% of the national tourist spend in 2022. It can therefore be argued that tourism spend in Mpumalanga contributed 9.5% to the national tourism GDP value in 2022. Therefore, it is estimated that Mpumalanga's tourism industry would have contributed R14.5 billion to the national tourism industry in 2022. In 2022, a R14.5 billion GDP contribution to the Mpumalanga economy would have been equal to 3.0% of Mpumalanga's GDP at current prices. Tourism's contribution would have been the second smallest/eight largest - larger than construction, but smaller than agriculture.

If the 2022 provincial GDP contribution is applied to the 2024 regional GDP for Mpumalanga, the 3.0% contribution by the tourism industry to provincial GDP at basic prices in 2024 would have been R17.0 billion in current terms. Tourism would have been the second smallest/eight largest industry in Mpumalanga in 2024.

In 2022, the combined 19 million bednights spent in Mpumalanga by foreign and domestic tourist was equal to 10.1% of total bednights in South Africa. The argument put forward is that bednights will be an indication of employment in a regions tourism industry. Therefore, Mpumalanga was responsible for 10.1% of tourism employment in South Africa. The 54 700 jobs would have been 4.6% (1 in 22 jobs) of Mpumalanga's employment number in 2022. In this simulation, tourism's employment contribution would have been larger than utilities but smaller than transport and thus the second smallest/eighth largest employing industry in Mpumalanga. The results are summarised in Table 5.

If the 2022 provincial employment contribution is applied to the 2024 labour data for Mpumalanga, the 4.6% contribution by the tourism industry to provincial employment in 2024 would have been 57 100. Tourism would have been the third smallest/seventh largest employment industry in Mpumalanga in 2024.

#### **4.4.3 Simulation 3**

##### *Provincial shares of tourist arrivals and bednights*

In 2022, the combined number of domestic and foreign tourist arrivals in Mpumalanga was approximately 10.9% of total tourist arrivals in South Africa. If total tourist arrivals also contributed 2.3% to GDP in South Africa in 2022, this simulation calculates that Mpumalanga was responsible for R16.6 billion of that. In 2022, a R16.6 billion GDP contribution in the Mpumalanga economy would have been equal to 3.4% of Mpumalanga's GDP. In 2022, the tourism industry in this simulation would have been only marginally smaller than the agriculture industry, but still the second smallest/eight largest industry in Mpumalanga. The size of this simulation's GDP contribution is the largest of the three simulations.

If the 2022 provincial GDP contribution is applied to the 2024 regional GDP for Mpumalanga, the 3.4% contribution by the tourism industry to provincial GDP at basic prices in 2023 would have been R19.3 billion in current terms. Tourism would have also been the third smallest/seventh largest industry in Mpumalanga in 2024.

Tourism employment in this simulation is similar to the previous simulation of 4.6% of total Mpumalanga employment. The results are summarised in Table 5.

#### **4.4.4 Summary of simulations**

The results from the three simulations indicate that tourism in Mpumalanga has a relatively modest direct impact on both economic output and employment. However, the indirect and

induced contributions of tourism to the province's economy were not accounted for in these calculations. Including these additional effects would likely reveal a significantly larger overall contribution, highlighting the broader economic value of the tourism sector. This underscores the need for comprehensive analyses to fully understand the sector's role in regional development.

In terms of GDP, tourism's direct contribution in 2022 ranges from 3.0% to 3.5% depending on the underlying assumption. Tourism's employment contribution ranges from 4.6% to 4.7% (Table 5). From these results the conclusion can be formed that the tourism industry exhibits a higher employment share relative to its GDP share, thereby indicating a high level of labour absorptive capacity in the industry.

Tourism data confirms that Mpumalanga recorded 23.8% of foreign arrivals and 10.3% of domestic overnight trips in 2024, however, much less was spend by tourists in Mpumalanga (i.e. only 7.8% of TFDS), in Mpumalanga. One can conclude that although tourist arrivals are relatively high, there is not a correspondingly high spend by foreign and domestic tourists in Mpumalanga, therefore tourism spending rather than tourism arrivals will impact the economy more. As a result, the more realistic GDP simulation is Simulation 3, where tourism made an estimated 3.4% contribution to GDP in 2024 based on total tourism spend in Mpumalanga.

When tourists spend the night in formal establishments, they do not only incentivise the sustained employment of workers in the hospitality industry, but the extra time they spend in a region increases the need for employees rendering related services and producing related goods. Therefore, the more logical employment simulation is that of Simulation 2 and 3, where tourism makes a 4.6% contribution based on total bednights in Mpumalanga.

**Table 4: Simulated direct GDP and employment contribution and ranking of tourism in Mpumalanga, 2024**

Indicator	Simulation		
	1	2	3
Direct GDP contribution	3.5%	3.0%	3.4%
Direct GDP ranking	3 <sup>rd</sup> smallest	2 <sup>nd</sup> smallest	3 <sup>rd</sup> smallest
Direct employment contribution	4.7%	4.6%	4.6%
Direct employment ranking	3 <sup>rd</sup> smallest	3 <sup>rd</sup> smallest	3 <sup>rd</sup> smallest

**Source: Simulated calculations**

**5. CONCLUSION AND CONSIDERATIONS**

By 2024, Mpumalanga consolidated its position as South Africa's second-most visited province by foreign tourists (23.8% national share – the highest ever recorded) and maintained sixth place for domestic overnight trips (10.3%). The province also captured the second highest share of international bednights in the country (18.3%), with foreign visitors staying an average of 10.2 nights – evidence that Mpumalanga is no longer just a transit corridor to Kruger but an increasingly valued multi-night destination.

Nevertheless, a persistent challenge remains: high arrivals and bednights are not yet translating into proportionate spending. With only 7.8% of national TFDS in 2024 (down marginally from

7.9% in 2023), Mpumalanga continues to record the lowest average spend per foreign visitor among the major tourism provinces, especially from its dominant African land-market source countries.

Simulations using 2024 data suggest that tourism's direct contribution to Mpumalanga's economy lies between 3.0% and 3.5%, and direct employment between 4.6% and 4.7%. When indirect and induced effects are included, the total economic contribution is very likely above 7% or even 8% – underscoring tourism's status as one of Mpumalanga's priority sectors.

It is recommended that the Department of Economic Development and Tourism (DEDT), the Mpumalanga Tourism and Parks Agency (MTPA), and other key stakeholders investigate strategies to attract high-spending tourists and encourage longer stays. Mpumalanga must aim to shift from volume to value and aggressively target higher-yield long-haul markets. The province must develop and package premium and experiential products that justify significantly higher per night spend.

The role players in the tourism space must aim to extend the length of stay and disperse visitors across the province. This could be done by creating compelling multi-day itineraries that link the various tourism routes in the province. To increase overnight stays in under-visited areas, product development grants can be researched to incentivise overnight stays.

By partnering with Mozambique and Eswatini on cross-border shopping and leisure packages, and encouraging investment in modern retail, restaurants and evening entertainment offerings near major border posts and along the Maputo Corridor so that more spending can be unlocked from the dominant African land markets.

The province should invest in the digital transformation of tourism statistics and establish a provincial tourism data observatory. This can be supported by the roll out of a province-wide free public Wi-Fi network at key tourism nodes and implement digital visitor feedback systems to track spend and satisfaction in real time. Mpumalanga is blessed with world-class natural assets. The next step is to pair those assets with world-class products, world-class data (in conjunction with the Provincial Tourism Statistics Technical Committee (PTSTC)) and a sharp focus on increased tourism yields.

Policy makers would do well to strengthen community-ownership models in and around protected areas so that communities actually feel the benefit. Mpumalanga can be positioned as a leader in responsible tourism by adopting province-wide certification for accommodation and activities.