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Visa Reform's Next Test: Can Tourism Move Beyond the Post-Covid Recovery?

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Yesterday, the President launched Phase 3 of the Government-Business Partnership, which places greater emphasis on sector-specific interventions. Mining, agriculture and agriprocessing, and tourism have been identified as priority sectors, alongside continued work on broader constraints to growth and investment.

In our latest data story, **Visa Reform's Next Test: Can Tourism Move Beyond the Post-Covid Recovery?**, we provide a baseline assessment of tourism in 2026.

It complements our assessment of mining reform available here: **Sometime before the sun goes down**.

South Africa reached 10.5 million tourist arrivals in 2025, just 2.6% above 2019, signalling that tourism has recovered from Covid but has yet to enter a new growth phase.

The key finding is that recovery has been largely regional, rather than driven by long-haul markets. African arrivals, which account for more than 75% of the total, are 6.5% above 2019, while overseas arrivals remain 8.5% below. Asia is the biggest laggard, despite visa reforms. The Middle East is a bright spot, up 8.2% on 2019 and 31.8% on 2024.

There is also a clear volume-value divide: African visitors arrive in greater numbers but spend less, while visitors from outside Africa spend significantly more, particularly on accommodation and guided activities. The Middle East is an increasingly important market, particularly in winter.

With tourism positioned as a labour-intensive export industry, at the BER we are cautiously optimistic. We recognise, however, that sustained growth in the sector will also depend on factors such as air connectivity, perceptions of safety and security, and a more strategic outlook on regional markets.