TBCSA Tourism Leadership Conference

Hon. Najib Balala,

WTTC EVP, Government Affairs, Advocacy, and Research

28 October 2026

WORLD TRAVEL & TOURISM COUNCIL

WORLD TRAVEL & TOURISM COUNCIL

CONGRATULATIONS TO

TBCSA

TOURISM BUSINESS COUNCIL OF SOUTH AFRICA

30 years

Of shaping South Africa's Travel & Tourism sector

WTTC is the authority on the economic & social contribution of Travel & Tourism.

The World Travel & Tourism Council represents the global private sector.

For more than 35 years, we have quantified the impact of Travel & Tourism across 184 economies.

We speak as one voice for the sector on:

- Fair economic policy for the sector
- Long-term, sustainable growth

200+ CEOS
Leading the world's largest Travel & Tourism companies

35+ YEARS
Of leadership and impact driving the industry forward

VIEW OF 184 ECONOMIES
The most comprehensive perspective on Travel & Tourism globally

WORLD-LEADING ECONOMIC IMPACT RESEARCH
Trusted data. Proven insights. Stronger decisions.

GLOBAL ADVOCACY
A united voice influencing economic and policy agendas worldwide

PRIVATE & PUBLIC COLLABORATION
Partnerships that unlock investment, innovation and inclusive growth

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Membership snapshot

All geographies and industries in Travel & Tourism

WORLD TRAVEL & TOURISM COUNCIL

	Hotels & Lodging	Transportation	Technology & Investment	Travel Agencies & Tour Operators	Destinations & Associations	Other
Europe, Middle East & Africa						
Americas						
Asia-Pacific						

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Stronger and **more diverse** board in WTTC history

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Engagements

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G20

UNESCO

AFRICAN UNION

UK HOUSE OF LORDS

APEC

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Travel & Tourism in 2025

Let’s explore the key trends and performance shaping our sector in **2025.**

Lead Research Partner

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How we measure Travel & Tourism

Understanding the complete economic impact behind **every journey.**

DIRECT	**Travellers pay directly to:** airlines, coach, rental car, train, cruise lines, travel agents, hotels, convention centres, restaurants, shopping centres, sports arenas, entertainment, theatre and recreation.
INDIRECT	**These are supplied by:** outside goods and services such as marketing and PR, cleaning and maintenance, energy providers, catering and food production, design and print.
JOBS	**These sustain jobs:** which pay salaries, wages, profits and taxes.
INDUCED	**Which pay into:** infrastructure, agriculture, technology, real estate, communications, education, banks, healthcare and more.
TOTAL	**Direct + Indirect + Induced**

OXFORD ECONOMICS
Knowledge Partner

35+ YEARS
Annual research

184 ECONOMIES
Global coverage

TRUSTED METHODOLOGY
Consistent. Transparent. Recognised.

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World: Travel & Tourism in 2025

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2.8%
Economy growth, 2025

3.9%
Travel & Tourism GDP growth, 2025

US$11.6TN
Travel & Tourism total contribution to GDP (6.9%)

366.5MN
Jobs supported by Travel & Tourism

10.9%
Share of jobs supported by Travel & Tourism

US$2.01TN
International spend
+3.2% YoY · 26.4% share

vs

US$5.61TN
Domestic spend
+3.5% YoY · 73.6% share

International vs domestic share

US$1.48TN
Business spend
+3.5% YoY · 19.5% share

vs

US$6.14TN
Leisure spend
+3.4% YoY · 80.5% share

Business vs leisure share

Source: WTTC– 2026 Economic Impact Research (EIR): Key Highlights (Mid-Year Update, 2026). Constant 2025 prices and exchange rates.

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Global economy versus T&T GDP (2025)

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2.8%

Global GDP growth

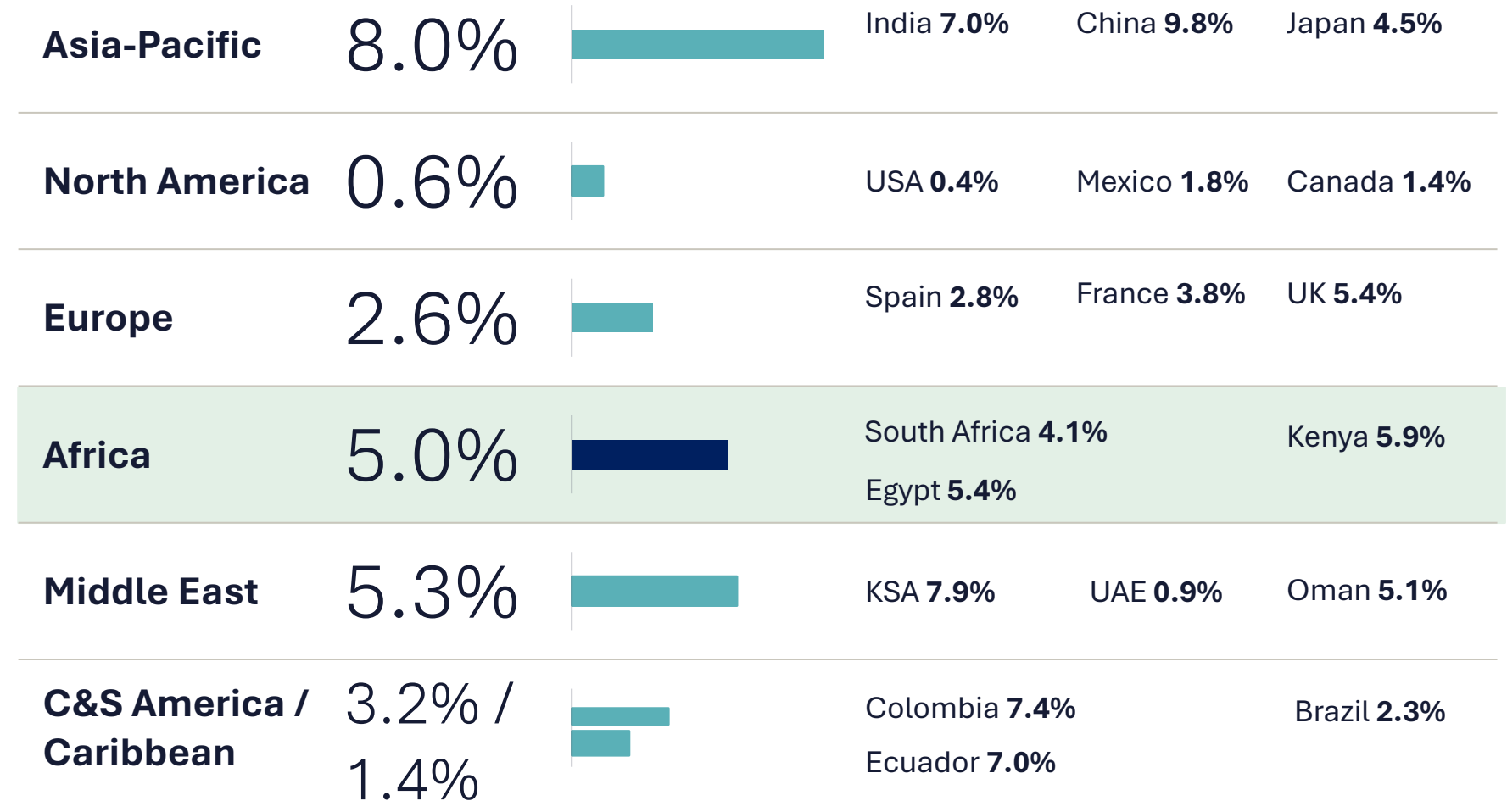
3.9%

Travel & Tourism GDP growth

US$11.6TN

T&T total contribution to global GDP (9.8% share)

T&T GDP growth by region, 2025



Asia-Pacific	8.0%	India **7.0%**	China **9.8%**	Japan **4.5%**
North America	0.6%	USA **0.4%**	Mexico **1.8%**	Canada **1.4%**
Europe	2.6%	Spain **2.8%**	France **3.8%**	UK **5.4%**
Africa	5.0%	South Africa **4.1%** Egypt **5.4%**		Kenya **5.9%**
Middle East	5.3%	KSA **7.9%**	UAE **0.9%**	Oman **5.1%**
C&S America / Caribbean	3.2% / 1.4%	Colombia **7.4%** Ecuador **7.0%**		Brazil **2.3%**

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International visitor spend (2025)

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3.2%

Global year-on-year growth

US$2.0TN

International visitor spend

Asia-Pacific leads regional growth

Asia-Pacific	8.3%	India **−8.1%**	China **10.5%**	Japan **8.7%**
North America	−3.3%	USA **−4.6%**	Canada **−3.5%**	Mexico **3.6%**
Europe	1.3%	Spain **3.3%**	France **7.7%**	UK **0.1%**
Africa	**5.0%**	South Africa **2.7%**		Kenya **3.8%**
		Egypt **7.3%**		
Middle East	4.8%	KSA **9.0%**	UAE **2.1%**	Oman **5.0%**
C&S America / Caribbean	3.6% / 2.5%	Colombia **3.3%**		Ecuador **6.5%**
		Brazil **5.3%**		

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Africa: Travel & Tourism in 2025

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4.3%
Economy growth, 2025

5.0%
Travel & Tourism GDP growth, 2025

US$229BN
Travel & Tourism total contribution to GDP (6.9%)

30.2MN
Jobs supported by Travel & Tourism

5.5%
Share of jobs supported by Travel & Tourism

US$75BN vs **US$117BN**

International spend
+5.0% YoY · 39% share

Domestic spend
+4.7% YoY · 61% share

International vs domestic share

US$51.3BN vs **US$140.9BN**

Business spend
+7.3% YoY · 27% share

Leisure spend
+3.9% YoY · 73.2% share

Business vs leisure share

Source: WTTC– 2026 Economic Impact Research (EIR): Key Highlights (Mid-Year Update, 2026). Constant 2025 prices and exchange rates.

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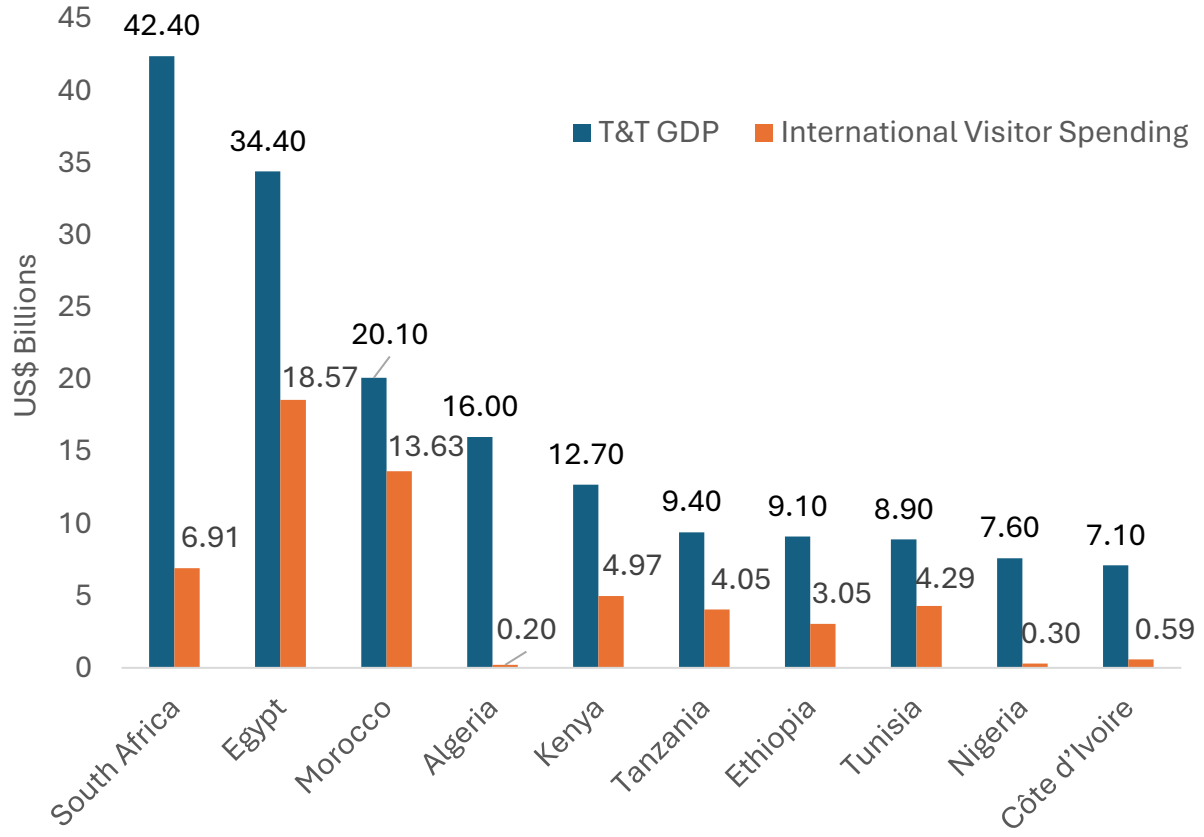
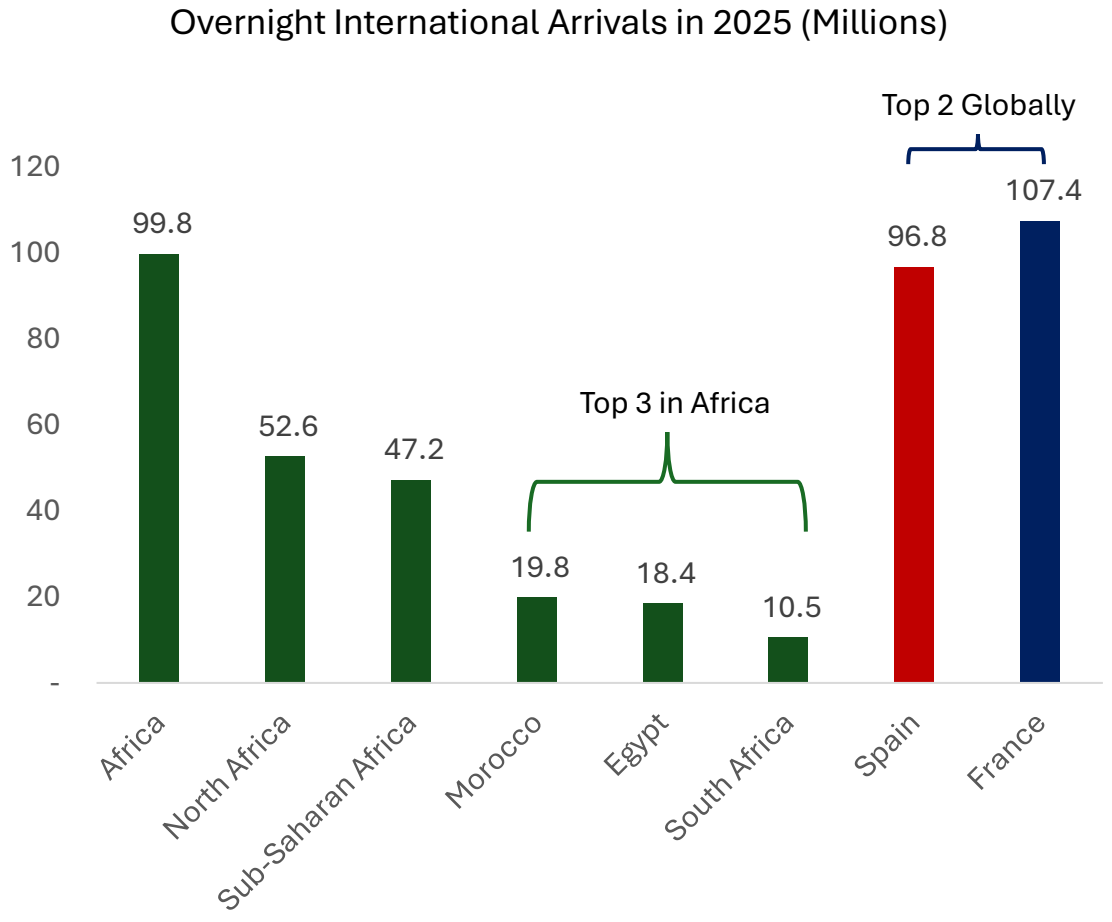
Top 10 Travel & Tourism Economies in Africa

- South Africa has the largest Travel & Tourism economy in Africa, followed by Egypt and Morocco.
- The composition of Travel & Tourism varies across the region.
- In Egypt and Morocco, international visitor spending (orange bars) are significantly larger than the rest of the region.



International Visitor Arrivals

- In 2025, there were 1.54 billion overnight international arrivals globally.
- Africa, with 99.8 million arrivals, accounted for just 6.5% of the global total.
- Africa attracts nearly same number of international arrivals as Spain (99.8 million vs 96.8 million).



Source: Oxford Economics

Recovery By Source Markets (2025)

- Europe is North Africa's main source market, and it has grown 42% compared to 2019.

North Africa		
Origin Region	**2025 Level (000s)**	**2025 vs 2019**
Europe	23,147	41.8%
Africa	8,318	2.2%
Middle East	6,136	136.8%
North America	1,609	57.2%
Asia Pacific	1,256	12.0%
C&S America	273	47.9%
Caribbean	10	56.6%

- Intra-regional travel is critical to Sub-Saharan Africa.
- Arrivals from Asia Pacific remained 2.8% below 2019 level.

Sub-Saharan Africa		
Origin Region	**2025 Level (000s)**	**2025 vs 2019**
Africa	23,702	3.1%
Europe	9,806	11.1%
North America	2,409	10.1%
Asia Pacific	2,196	-2.8%
Middle East	586	-0.2%
C&S America	225	10.6%
Caribbean	28	17.5%

Source: Oxford Economics; excludes 'Other Regions'

Forecast: 2026

Lead Research Partner

Travel℠

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World: Forecast for 2026

Lead Research Partner Travel

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2.4%
Global GDP growth

2.5%
Travel & Tourism GDP growth

$11.9TN
Travel & Tourism total contribution to global GDP (9.8%)

375 MN
Jobs supported
by Travel & Tourism

11.0%
Share of Jobs supported
by Travel & Tourism

$2.0TN
International
Spend
+0.7% YoY
25.9% share

VS

$5.8TN
Domestic
Spend
+3.2% YoY
74.1% share

$1.5TN
Business
Spend
+3.6% YoY
19.7% share

VS

$6.3TN
Leisure
Spend
+2.3% YoY
80.3% share

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Africa: Forecast for 2026

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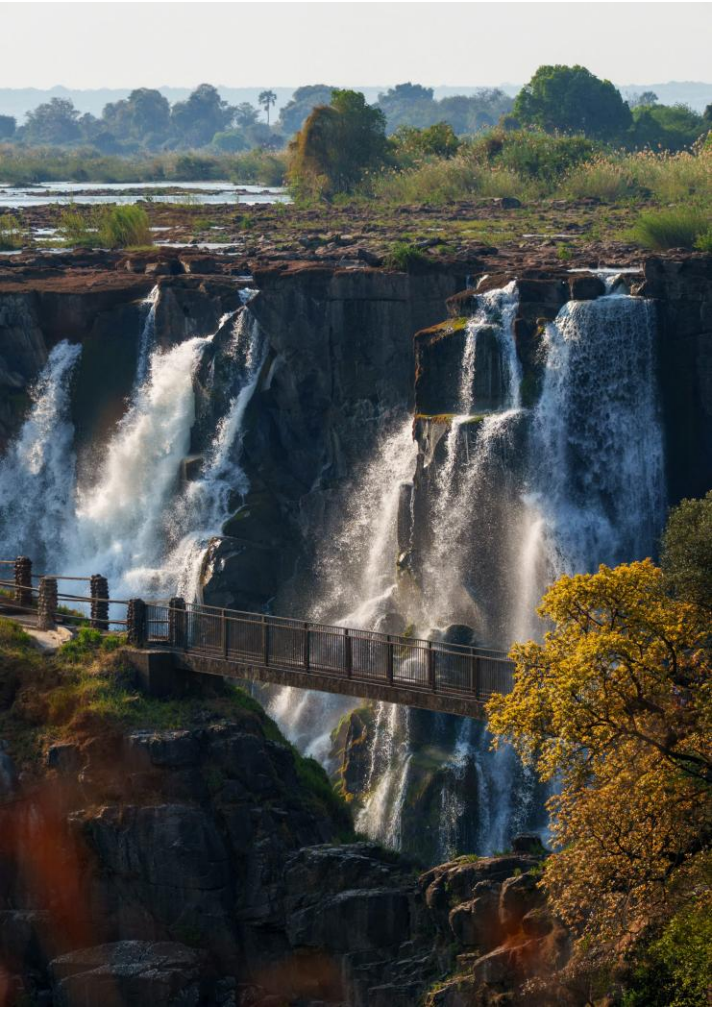

3.8%
Regional GDP growth

4.5%
Travel & Tourism GDP growth

$239 BN
Travel & Tourism total contribution to regional GDP (6.7%)

31.3 MN
Jobs supported
by Travel & Tourism

5.6%
Share of Jobs supported
by Travel & Tourism

$80.2 BN
International
Spend
+7.0% YoY
39.4% share

VS

$121.5 BN
Domestic
Spend
+3.7% YoY
60.6% share

$53.5 BN
Business
Spend
+4.2% YoY
26.4% share

VS

$148.3 BN
Leisure
Spend
+5.3% YoY
73.6% share

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Africa: Long-Term Outlook

ECONOMIC GROWTH

+3.5%

Africa's is expected to grow 3.5% each year until 2036

(World: 2.6%)

+

POPULATION GROWTH

+362 MN

By 2036, population is projected to increase by almost 362 million.

→

DEMAND GROWTH

- Economic growth raises spending power.
- Population growth boosts the demand base.

Together, they will lift demand for Travel & Tourism

→

OPPORTUNITY FOR AFRICA'S TRAVEL & TOURISM

- Destinations in Africa stand to gain from this macroeconomic tailwind due to geographical, cultural, and political proximity
- **South Africa**, where **77%** of inbound arrivals are from Africa, will be among the beneficiaries.

Unlocking the Opportunity

WORLD TRAVEL & TOURISM COUNCIL

WTTC's 8 Areas of Priority

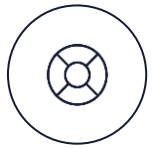
Based on feedback from our global members, we understand the forces changing Travel & Tourism and have defined eight priorities to guide our response.

Enabling secure, seamless travel (e.g. digital standards, biometrics, visas)

Destination stewardship and overcrowding (unmanaged travel)

Sustainability, environmental and social action initiatives (e.g. ocean, circular economy, Basics)

Harnessing **new technologies** (e.g. robotics, AI)



Crisis preparedness, management and recovery

Expanding **connectivity** (air, land, sea) and new travel corridors (e.g. Global South)

Workforce (recruiting, attracting and retaining talent, and skills development)

Policies to foster **investment** and new growth opportunities

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Seamless Travel

IMPROVE CONNECTIVITY

- Improve intra-region air, rail, and road connectivity.
- Full execution of the Single African Air Transport Market (SAATM).
- Incentivise the regional aviation sector.
- Boost air connectivity with long-haul markets.

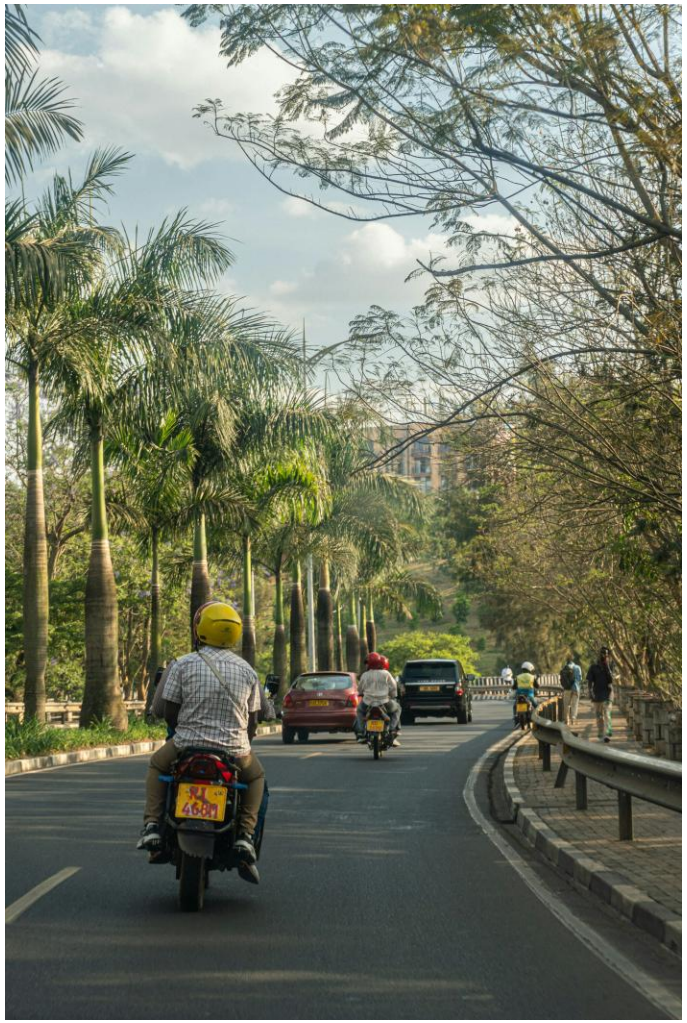
ADOPT BIOMETRICS

- Use more biometrics at airports to improve traveller journey experience and boost security.

SUPPORT VISA FACILITATION

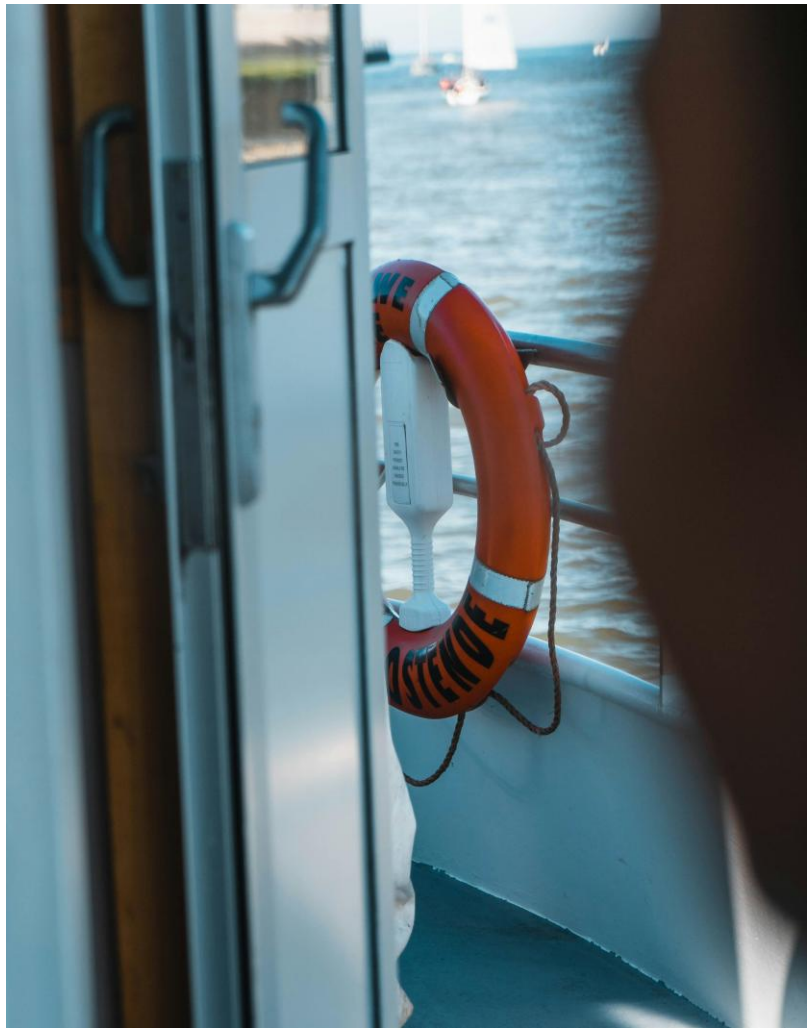
- Ease visa restrictions so that travellers can easily travel in Africa.

Infrastructure & Investment



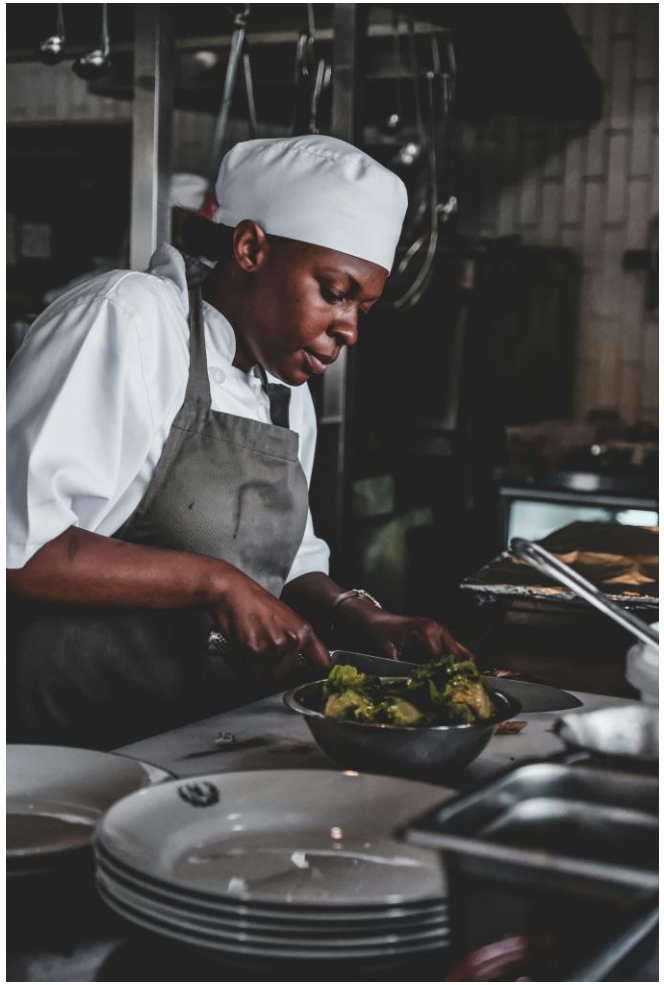
- Invest in physical and digital infrastructure.
- Encourage public-private collaboration to fill investment gaps.
- 7 principles of attracting private tourism investment:
  - Provide legal certainty and regulatory stability
  - Establish a one-stop shop for tourism investment
  - Publish a tourism strategy with full stakeholder alignment
  - Provide competitive fiscal incentives
  - Guarantee strong support from top levels of the government
  - Draw up a comprehensive destination master plan with visible project pipeline
  - Support a sustained growth and market potential of the sector.

Crisis Preparedness



- Crisis preparedness protects growth and Africa's brand.
- Crises hit fast. Preparations decides how fast destinations recover.
- **Plan together**: Build crisis plans with government, airlines, hotels, operators, SMEs, and communities.
- **Communicate fast:** Give travellers and media one clear, accurate message.
- **Build resilience**: Travel & Tourism is a resilient sector, but crisis preparedness plans restore visitor and investor confidence sooner.
- **Give context**: Show travellers where a threat is and how big it is, so one incident does not tarnish a whole region.

Workforce & Talent



+9 MN Africa's T&T is expected to support around 9 million additional jobs in the next decade.

- The sector needs more workforce and skills to meet growing demand.
- **Attract young people**: Make T&T a career of choice through campus outreach, career talks, and partnerships.
- **Show career path**: Highlight the range of roles, routes to promotion, and the chance to make a real impact.
- **Train the SMEs**: Target skills support at SMEs, which make up the majority of the sector.
- **Let talent move**: Allow greater labour mobility Africa.

Sustainability

- Grow the sector sustainably, so that economic gains protect nature and benefit local communities.
- Protect the natural environment that is Africa’s biggest tourism treasure.
- Champion a nature-positive tourism approach.
- Involve the local communities when drafting tourism plans.

Final Thoughts

We are all aligned. So, what is missing?

Political will, from both parties.

Thank You

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