ONLINE TRAVEL TRACKER

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SOUTH AFRICAN SPECTRUM

VOLUME 03

1. South Africa’s Foundational Backbone

- **A struggling economy that is starting to get back on track.** South Africa’s GDP grew by 1.1% in 2025, its highest rate since 2022, with projections of 1.4% in 2026. Unemployment is high, at 31.4% in Q4 2025, whilst youth unemployment rates are higher, at 57%. Operation Vulindlela (OV) launched in 2020, a joint initiative between the Presidency and the National Treasury, to support economic recovery through accelerating structural reforms including electricity and water supplies, transportation network, digital communications and visa regime reforms. Phase 2 has now started, with a focus on green and digital transformation, as well as local government reforms

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- **A super youthful, educated population.** 56% of the country’s 63 million people are under the age of 30. Not only that, adult literacy is at a high 95%

- **High mobile penetration, but internet instability.** Active cellphone connections reached 127 million in late 2025, ~196% of the total population, whilst the internet penetration rate was 79.6%. However, internet connectivity can be impacted by load shedding (scheduled power cuts). As of 13 March 2026, Eskom, South Africa’s national electricity utility company, marked 300 consecutive days without load shedding - so the situation in theory is improving

- **Increasingly modernised payment systems.** Debit and credit cards are most used for e-commerce, followed by account-to-account transfers, and mobile/ digital wallets. PayShap, launched in 2024, allows instant payments using a mobile number (ShapID), opening up payments further

- **Whatsapp is the king of the messaging apps.** It is estimated that 74.5% of internet-connected South Africans use Whatsapp. Telegram is at around 32% usage

Infrastructure buildout

- **Infrastructure is a core strategy for economic growth for South Africa**, at the heart of OV, with plans to restore passenger rail services to support the increasing urbanisation rate

- **Digital infrastructure is also in focus.** The government is creating a real-time data exchange within departments to securely share information, and works are ongoing between the National Treasury and the South African Reserve Bank to create a modern payment system that can offer flexible payment channels, including EFTs, mobile wallets, QR codes and PayShap

- **Air infrastructure is getting an upgrade.** The Airports Company South Africa (ACSA) is investing 21.7 billion ZAR in maintenance and capital expansion across its 9 airports nationally. Additional key aviation infrastructure projects being undertaken include:

    - O.R. Tambo International Airport in Johannesburg - allocated 14.5 billion ZAR for a five-year upgrade project to improve operational reliability

    - Cape Town International Airport - will undergo an 11.3 billion ZAR expansion to boost capacity, including a new domestic terminal and a runway capable of handling wide-body aircraft

- **High-speed railway on the cards?** Plans have been touted for a $34 billion USD, 500km HSR network to link Johannesburg, Musina and eThekwini. The first phase would see linkages between KwaZulu-Natal, Gauteng and Limpopo. If built, this would be one of the largest ever transport infrastructure investments in sub-Saharan Africa - however, the dream of an HSR started back in 2019 without significant progress, and land acquisition will present a major stumbling block

Airlines

- **South Africa holds the highest domestic air capacity in Africa, the second highest international air capacity.** As of March 2026, South Africa has 1.6 mil domestic seats, +14% YoY, and 2.3 million international seats, +13% YoY, compared to front-runner Egypt's international seats at 2.8 mil

- **Passenger traffic is still down on pre-pandemic levels.** International passengers in 2025 were down by 5% vs 2019, whilst domestic passengers were below by 7%

- **Competitive airline space after going through the COVID shake-up.** There are currently 5 South African airlines: full-service carriers South African Airways and Airlink, and low-cost carriers Lift, FlySafair and CemAir

- **Two airlines went under during the pandemic.** Comair, which had a 40% share of domestic business, failed to secure funds to maintain its operations in 2022 and moved to liquidation in Jun 2022. Mango Airlines ceased operations in Jul 2021, and fully closed in Jul 2025 after the rescue plan by private investors failed to take effect

- **Flagship carrier, South African Airways (SAA), sees turnaround.** SAA has struggled to remain profitable since 2011, and even before the pandemic hit, it entered Business Rescue in December 2019. The airline suspended operations in 2020, and then experienced a failed privatisation deal, leaving it 100% state-owned. As of its financial year ending 31 Mar 2025, it saw a net profit of 155 million ZAR, its second consecutive profitable year

- **Skies to get busier, with more planes on order.** Airlink received 3 new Embraer E195-E2 aircraft in late 2025 out of its 10 planned leased jets. Meanwhile, FlySafair signed a leasing agreement to receive 2 B737-800NG aircraft from Q3 2026, and 3 B737 MAX 8 from Q1 2028. SAA has 3 planes on order (1 x A320-200, 2 x A330-200s) expected for delivery in 2026, with the plan to lease additional A330s in H2 2026 - but the slower-than-expected delivery is impacting its network plans

Top 10 International Markets in Africa by Seat Capacity (Mar 2025, 2026)

No	Country	Mar 2025	Mar 2026	% YoY
1	Egypt	2,778,534	3,127,134	12.5%
2	South Africa	2,297,530	2,588,286	12.7%
3	Morocco	1,725,003	1,925,648	11.6%
4	Ethiopia	1,311,057	1,365,713	4.2%
5	Nigeria	1,063,799	1,148,276	7.9%
6	Algeria	820,420	956,958	16.6%
7	Kenya	831,761	917,897	10.4%
8	Tanzania	556,246	621,964	11.8%
9	Tunisia	450,859	506,377	12.3%
10	Ghana	269,080	270,116	0.4%

Source: OAG

Top 10 Airlines in Africa by Seat Capacity (Mar 2025, 2026)

No	Airline	Mar 2025	Mar 2026	% YoY
1	Ethiopian Airlines	1,895,061	1,970,341	4.0%
2	Safair	954,288	1,082,610	13.4%
3	Egyptair	788,848	848,102	7.5%
4	Air Algerie	574,278	677,014	17.9%
5	Royal Air Maroc	517,535	655,157	26.6%
6	Airlink	473,616	537,748	13.5%
7	Ryanair	464,683	469,117	1.0%
8	Emirates	388,941	432,737	11.3%
9	South African Airways	340,587	427,323	25.5%
10	Kenya Airways	383,363	378,454	-1.3%

Source: OAG

Note: *Safair, Airlink, and South African Airways are South Africa-based airlines*

A who's who of tourism-linked conglomerates

- **Bidvest Group**
    - Founded in 1988, owns services in security, aviation (e.g. air cargo services, airport lounges), catering and travel
    - BidTravel, the group's travel division, manages DMCs and TMCs including New Frontiers Tours, Rennies BCD Travel, and Harvey World Travel Group, Cruises International, BushBreaks & More

- **Tourvest Holdings**
    - One of the largest integrated tourism groups in Africa, its operations span the entire tourism value chain, including:

➢ Travel Services: managed through Tourvest Travel Services, providing corporate and leisure travel management.

- *Technology solutions: Travelit, weExpense, Purchaseit*
- *Travel Management: Tourvest Travel Services, Seekers, Maties Travel, Indo Jet Travel*
- *Leisure Travel: Travel.coza (including GoCruise, GoSports)*
- *MICE: Tourvest Meetings & Events, EfferVescENTS*

➢ Destination Management: extensive inbound tour operations

- *Leisure Travel: Sense of Africa, African Eagle Namibia, Sense of Oceans, Go Vacation Africa, e.DMC, drifters, Wild Africa Travel, Africa Collection, Voss Destination Management, LifeXperiences*
- *Sports, Events, and Leisure (South Africa and Europe): pure-travel, SA Rugby Travel, Team Travel Management, Rugby Travel Ireland*

- Accommodation: management of various lodges and hotels
  - *Aha Hotels & Lodges, Lesedi, Makalali, Buffalo Rock (Kruger National Park), Nkambeni Safari Camp (Kruger National Park), Shepherd's Tree Game Lodge (Pilanesberg Game Reserve), Ivory Tree Game Lodge (Pilanesberg Game Reserve), Thakadu River Camp, Lemala, ECHO Africa, The Elephant Camp, The Wallow Lodge, Old Drift Lodge, Adrift*
- Activities: experiences and products through facilities owned or managed by Tourvest, complemented by hotels and lodges
  - Wild Horizons, ECHO Africa, Mankwe Gametrackers, Airtrackers (Pilanesberg National Park), Cape Shark Adventures, Chimp & Zee, Adrift
- In-flight Retail: services for international and local airlines

- **Cullinan Holdings**
  - A long-standing leader in tourism, leisure, and marine services. It is owned by the Tollman family, who also own the global Travel Corporation and Red Carnation Hotels. Key brands include:
    - Thompsons Holidays & Thompsons Africa, major wholesale and inbound tour operators
    - Pentravel, a well-known retail travel agency
    - Hylton Ross Tours, specialised in coach charters and touring
    - Tour operators (outbound): Thompson Holidays, Gateway Travel & Tours, Pentravel

- Tour operators (inbound): Thompsons Africa, Springbok Atlas Tours and Safaris, Cullinan Namibia Tours & Safaris, Cullinan Guided Journeys, African Diamond Tours & Incentives, Planet Africa Tours, Grosvenor Tours, Explorer Safari by Grosvenor Tours, followme2Africa, Chobezi

- Touring/Coaching: Springbok Atlas Luxury Charter, Hylton Ross, iKapa Coaches, Eastgate Safaris & Transfers, On Safari Africa

- MICE and Marine Services: Thompsons Meetings & Incentives, Peak Incentives, Edusport Travel and Tours, Manex, Central Boating

2. Domestic travel's volume-value gap widens; regional travel makes inbound travel resilient

Domestic travel

- **Targeting a modest increase in domestic by 2029; 45.1 million domestic trips (+12% from 2024), 139.4 bil ZAR spend (+1.8% from 2024)**

- **A volume-value gap exists in the domestic market, as the number of trips increase, but overall spend decreases.** Economic pressure remains the primary barrier for domestic travel, with 41% citing financial constraints as the leading reason for not taking trips. In Q4 2025, there were 13.9 million domestic total trips, +28% YoY, but the average spend per trip dropped 46% YoY, and domestic overnight spend was down -31% YoY

- **South Africa has 750,000km of roads, the largest network in Africa, and 10th globally.** However, rising transport-related costs are limiting long-distance travel - in Q4 2025, overall transport-related expenditure dropped by 24%. On top of that, infrastructure collapses on key access routes have impacted tourism. Limpopo in Q3 2025 saw a 72% drop in day trips, due to the severe deterioration of the R522 and R572

- **Visiting Friends and Family remains the dominant driver for domestic trips, at 51%, and grew 59% YoY in Q4 2025.** Holiday travel spend for overnight trips was down 43.9% in Q4 2025, dropping to 3,284 ZAR

- **All expenditure categories declined in Q4 2025.** Leisure and entertainment were -62% YoY, F&B -26% YoY and accommodation -32% YoY

- **Long-running Sho't Left domestic travel campaign increasingly digitalised.** Sho't Left, a domestic travel campaign which started back in 2004, is still going strong. Now it aims to be seen as the "Black Friday" of travel, with a week of travel deals aimed at making travel more affordable. Mabeka Makola, Marketing and Communications Manager for Southern Africa at South Africa Tourism, noted that "less than 7% of [our] adult population currently travel for holidays, and through Sho't Left Travel Week, we want to inspire them with a variety of relevant deals and packages to travel locally, which stimulates economic growth and helps alleviate unemployment". The dedicated website highlights travel deals, offering free listings for travel providers to promote special deals, whilst the tourism board promotes the campaign nationally

Number of Domestic Trips by Province (2024, 2025)

Province/ Tourists ('000)	2024			2025			% YoY		
	Day	Overnight	Total	Day	Overnight	Total	Day	Overnight	Total
Gauteng	24,200	7,000	**31,200**	23,400	6,300	**29,700**	-3.3%	-10.0%	**-4.8%**
Western Cape	9,300	3,417	**12,717**	10,000	4,065	**14,065**	7.5%	19.0%	**10.6%**
Limpopo	28,200	6,400	**34,600**	19,700	7,500	**27,200**	-30.1%	17.2%	**-21.4%**
Eastern Cape	9,200	5,000	**14,200**	6,200	5,466	**11,666**	-32.6%	9.3%	**-17.8%**
North West	9,400	3,164	**12,564**	8,200	4,056	**12,256**	-12.8%	28.2%	**-2.5%**
KwaZulu-Natal	20,500	7,500	**28,000**	19,000	8,700	**27,700**	-7.3%	16.0%	**-1.1%**
Mpumalanga	10,500	3,175	**13,675**	12,600	3,785	**16,385**	20.0%	19.2%	**19.8%**
Northern Cape	2,661	1,024	**3,685**	3,405	1,628	**5,033**	28.0%	59.0%	**36.6%**
Free State	9,100	3,606	**12,706**	9,600	3,301	**12,901**	5.5%	-8.5%	**1.5%**
TOTAL	**123,061**	**40,286**	**163,347**	**112,105**	**44,801**	**156,906**	**-8.9%**	**11.2%**	**-3.9%**

Source: Stats SA

Inbound travel

- **Inbound travel recovers beyond 2019 levels.** International tourist arrivals to South Africa grew 18% YoY to 10.5 million in 2025, +3% vs 2019. In Jan 2026, South Africa's overnight international visitors were 1.1 mil, +12% YoY and +6% vs Jan 2019. However, Asian arrivals still lag behind, at -38% vs 2019

- **Targeting 15 million international arrivals, 115.2 bil ZAR in spend, by 2029.** This represents an ambitious 43% leap from 2025's arrivals, and 26% increase vs 2024's tourism spend

- **Long-haul markets rebound strongly.** In 2025, arrivals from the UK grew +15% YoY, Germany +14% YoY and USA +5% YoY. In December 2025, Russia saw the highest YoY growth, at 34% YoY

- **Southern African Development Community (SADC) countries make up the majority of South Africa's travellers, creating a resilient base.** In Jan 2026, travellers from SADC countries accounted for 77.8% of South Africa's total arrivals

- **91% of inbound travellers visit just one province in South Africa.** However, the 9% who visit more than one province stay 20 days (vs 14 days), and spend more - 26,000 ZAR vs 8,800 ZAR

- **eVisa, ETA systems hoped to ease access.** Ease of access is also one of the national tourism ministry's 5 pillars for its Tourism Growth Partnership Plan 2025-2030. Under OV, an e-visa system was rolled out in 2022 to 14 nationalities, and has now been extended to 34 countries. The ETA system was launched in Oct 2025, in time for G20 summit delegates from China, Indonesia, India and Mexico, and in Feb 2026, was opened to all nationals from those countries. The eVisa system has been reported as unstable, with the ETA system being advised instead for some nationalities. South Africa aims to attract 500,000 visitors annually from both India and China

- **New visa scheme launched to boost its MICE appeal.** In March 2026, a new Meetings, Exhibitions, Events and Tourism Scheme (MEETS) was launched to support processing high-volume, time-sensitive group visa applications attending international events

- **Coordination with neighbouring countries can bring benefits for long-haul travellers.** In Jan 2026, 94% of SADC arrivals were by road, showing how important neighbouring countries are. The SADC has been coordinating a roadmap for sustainable tourism development across its 16 member states, with 3 priority areas including:

    - Visa harmonisation - implementing the SADC Tourism UniVisa pilot project, involving Angola, Mozambique, Namibia, South Africa, and Zimbabwe. ICT systems, legal frameworks, and revenue-sharing models have been developed and are being benchmarked against the KAZA UniVisa and East African Tourism Visa

    - Air access - implementing the Single African Air Transport Market, and addressing high aviation taxes

    - Cross-border product development - in particular, developing Southern Africa's 12 Transfrontier Conservation Areas (TFCA). Boundless Southern Africa, a regional marketing and investment promotion initiative, supports this goal

- **Cooperation with the UAE led to enhanced air cooperation and uplift - but now leaves South Africa vulnerable.** In 2025, SAA and Emirates signed an MoU for an enhanced codeshare agreement, with SAA providing feeder traffic from domestic airports, and Emirates providing the long haul reach. The aim was to have 56 flights per week into South Africa by July 2026, enhanced by a third daily flight to Cape Town

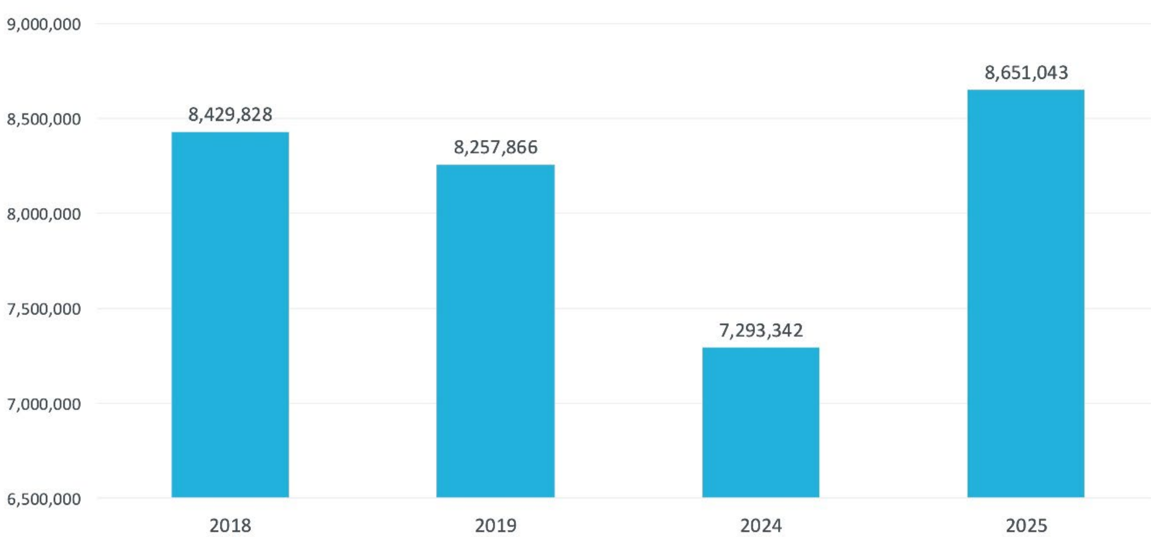
- **Gearing up for a tourism boost thanks to the ICC Men's Cricket World Cup 2027.** South Africa is set to host 44 of the 54 matches across 8 venues, and is expected to benefit from a boost to arrivals from cricket fans. Qantas launched a Johannesburg-Perth direct flight in December 2025, seen to play a "strategic role" in bridging Australian cricket fans with South Africa

Top 10 International Arrivals to South Africa (2018, 2019, 2024, 2025)

No	Countries	2018	2019	2024	2025	% YoY	% vs 2018	% vs 2019
1	Zimbabwe	2,208,930	2,258,794	2,183,260	2,307,196	5.7%	4.4%	2.1%
2	Mozambique	1,360,896	1,333,195	1,591,751	2,078,635	30.6%	52.7%	55.9%
3	Lesotho	1,739,188	1,563,448	974,369	1,395,346	43.2%	-19.8%	-10.8%
4	Eswatini	883,735	917,631	842,318	958,716	13.8%	8.5%	4.5%
5	Botswana	688,566	668,315	395,965	418,474	5.7%	-39.2%	-37.4%
6	UK	430,708	436,559	349,883	403,714	15.4%	-6.3%	-7.5%
7	USA	376,892	373,694	372,362	391,939	5.3%	4.0%	4.9%
8	Germany	343,229	322,720	254,992	290,795	14.0%	-15.3%	-9.9%
9	Malawi	197,317	199,079	163,726	230,640	40.9%	16.9%	15.9%
10	Namibia	200,367	184,431	164,716	175,588	6.6%	-12.4%	-4.8%

Source: Stats SA

International Arrivals to South Africa (2018, 2019, 2024, 2025)



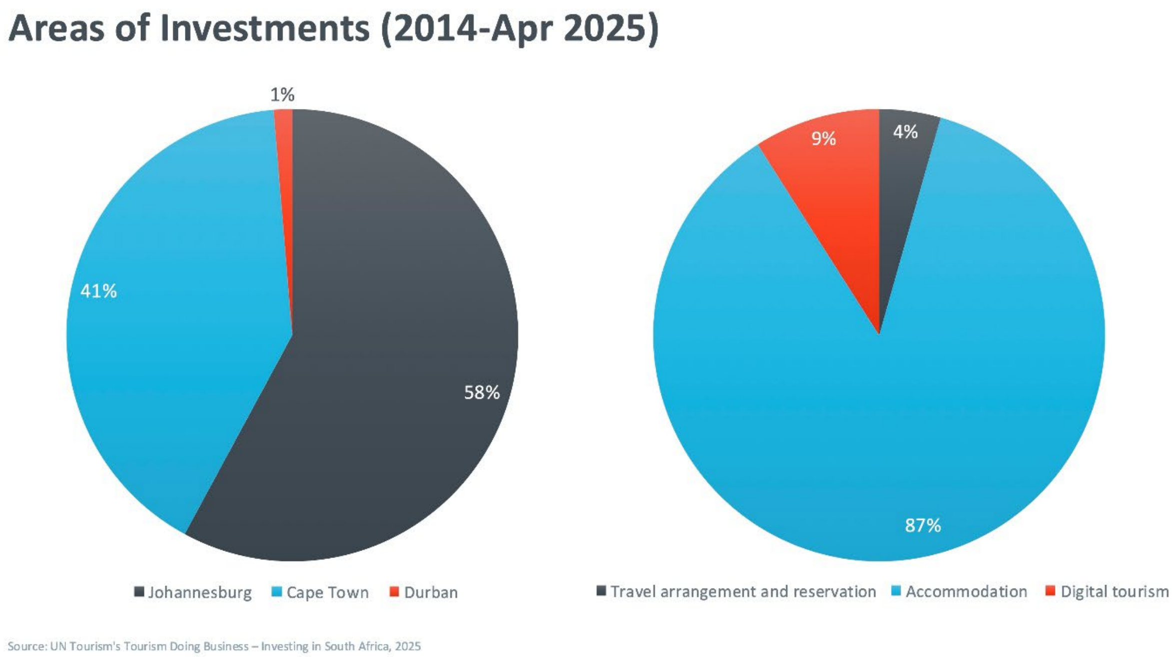
Source: Stats SA

3. The Online Travel & Start-Up Landscape

- **Digital economy:** South Africa's e-commerce revenue in 2025 was expected to surpass $7.7 bil USD, accounting for around 10% of the country's overall retail sector. Its online travel market was estimated by IMARC Group to be worth $2.54 billion in 2024, and forecast to grow to $5.96 billion USD by 2033

- **South Africa is a leader in innovative tourism on the continent.** Natalia Bayona, the Executive Director of UN Tourism stated that "with over USD 3.1 billion in venture capital mobilized between 2019 and 2024—and 57% of all tourism tech VC investment in Africa—South Africa is emerging as a continental leader in innovation-driven tourism"

- South Africa was one of the top three greenfield foreign direct investment destinations in Africa in tourism clusters (28 projects/ $348 mil USD CAPEX) from 2014-2025 (Apr).
    - **Investment was concentrated on 3 major cities:**
        - Johannesburg ($114 mil USD)
        - Cape Town ($80.3 mil USD)
        - Durban ($2.6 mil USD)
    - **Investments were made into:**
        - Travel arrangement and reservation services (8 projects, $10.4 mil USD)
        - Accommodation sector (5 projects, $205 mil USD)
        - Digital tourism services (5 projects, $21.4 mill USD)



- **South Africa has seen $39 million USD in VC funding for tourism-related solutions from 2019-2024**, while in 2024, 70% of VC deals in general concentrated on fintech

- **A strong startup ecosystem for the tourism sector.** The Southern Africa Tourism Services Association (SATSA), runs a Tourism Business Incubator Program, whilst the Department of Tourism and the Technology Innovation Agency (TIA), an agency of the Department of Science and Innovation (DSI) have previously run a Tourism Technology Grassroots Innovation Incubator Programme (TTGIIP)

- **South Africa Tourism developing its AI flex.** It launched Siyanda, its AI powered travel assistant in Dec 2025, in partnership with Matador Network's GuideGeek platform. The assistant enables travel advisors to access real-time, destination-specific insights, craft custom itineraries, suggest authentic experiences and answer client queries

- **64% of hoteliers have an AI strategy.** HAMAC reported that 77% of hoteliers are actively exploring new tech to streamline operations. 38% are using AI for revenue management. Those hotels without an AI strategy report lacking the resources to understand, develop, or drive one.

- **International OTAs drive hotel bookings for South Africa, but direct bookings remain an important source.** SiteMinder's 2025 hotel booking trends report places Booking.com at the top - but hotel websites in second place. RoomRaccoon also reported a growth in direct bookings of 24% YoY in Summer 2025

Top 12 Hotel Booking Channels in South Africa (2024, 2025)

Rank	2024	2025
1	Booking.com	Booking.com
2	Hotel websites (direct bookings)	Hotel websites (direct bookings)
3	Expedia Group	Expedia Group
4	Hotelbeds	Tourplan
5	Global distribution systems	Agoda
6	Tourplan	Hotelbeds
7	Agoda	Global distribution systems
8	Wilderness Window	followme2AFRICA
9	followme2AFRICA	Wilderness Window
10	WebBeds	WebBeds
11	Thompsons Holidays	Thompsons Holidays
12	Airbnb	TBOHolidays

Source: SiteMinder's *Hotel Booking Trends 2025*

Consumers + digital

- **Traveller AI adoption strong.** Marriott Bonvoy's 2026 Ticket to Travel study showed that AI has become an essential tool for South Africans booking their holidays, with 49% having used it for planning/ researching a holiday. Younger travellers are at the forefront of adoption, with 66% of Gen Z and 53% of Millennials using it. 59% in general said that they would feel comfortable booking accommodation through AI platforms

- **National policies around AI are providing guidance for deployment.** South Africa's Draft National AI Policy has formally entered the Cabinet approval process, signalling a shift from high-level principles to concrete regulatory development. It is expected to be gazetted for a 60-day public consultation in March 2026, with finalisation targeted for the 2026/2027 financial year. The oversight will be a sector-specific, multi-regulator model rather than a single AI regulator, meaning AI governance will be embedded within existing supervisory frameworks

Most Visited Travel and Tourism Websites in South Africa (Feb 2026)

No	Website	Type of business	Visits
1	Booking.com	OTA	2,676,432
2	Safair	Airline	845,677
3	LekkeSlaap	OTA	698,669
4	Webtickets	Tickets	697,362
5	Airbnb	OTA	678,839
6	TripAdvisor	Metasearch	514,125
7	Airlink	Airline	446,103
8	Intercape	Bus transportation	425,850
9	eDreams	OTA	341,150
10	Cheapflights.co.za	Metasearch	338,269

Source: SEMRush, Most Visited Travel and Tourism Websites in South Africa, Updated February 2026

Home-grown travel tech

South Africa has a number of home-grown travel tech solutions, designed to contend with unique issues with connectivity, smaller, rural lodges, and the setup of safari circuits:

- **TravelLab:**
    - A Cape Town-based fintech/travel tech group, focusing on disrupting the African travel ecosystem
    - Founded in 1999 in Sweden; moved to Cape Town in 2010 to focus on emerging markets
    - Funding: $40 mil USD in 2015 from HarbourVest Partners, Amadeus Capital Partners and MTN, an internet provider
    - Operates in 16 countries, including South Africa, Nigeria, Kenya, Turkey and UAE

    - **Operates:**
        - TravelStart - the original brand of TravelLab, and the incumbent and largest OTA in South Africa
            - Offers flights, hotels, buses, cars, and travel packages
            - Post-COVID, rewired its business to "subscription bundled with loyalty", launching Travelstart+ in April 2024, allowing users to plan travel using a mobile device and giving exclusive discounts
        - NightsBridge - leading Channel Manager & PMS in Africa. ActivityBridge offers similar for for non-accommodation suppliers of adventure ,experiences and tours
            - Founded in 2005 by husband-and-wife team, acquired by TraveLab in 2018

- Built to solve South African problems, e.g. load shedding with a lightweight tech solution
- Created PayBridge, to allow small local lodges to take credit card payments and automated EFTs without needing a merchant bank account
- In March 2026, NightsBridge acquired Semper, another South African hospitality software provider, combining the strengths of Semper as a PMS to handle back-office operations, and NightsBridge as a Channel Manager
- Rolling out Green Reports to help lodges track water and electricity usage

- SafariNow - founded in 1999, acquired by TravelLab in 2016. Offers accommodation
- Glyde Pay - neobank and CAAS (card as a service) solution for payments complexities to solve for complexity of travel payments for consumers and businesses. Launched in 2022
- Hepstar - global leader in distribution of travel insurance and ancillaries
- SkylabX - innovation lab, Travel as a Service platform helping businesses offer integrated travel solutions into their loyalty programs
- Club Travel - holds 25% market share in South Africa, empowers over 420 travel companies. Acquired by TravelStart in 2019
- FlightSite - OTA, also includes Club Holidays
- AI play with Otto, its AI travel assistant, with a South African flavour
- South Africa's "number 1 NDC supporter for Singapore Airlines, Kenya Airways, British Airways and Emirates"

- **LekkeSlaap**
    - Founded in 2013 in Cape Town
    - Owned by TripCo
    - Funding: no formal funding rounds recorded to date
    - Product: accommodation booking platform
    - South Africa's first Afrikaans leisure accommodation booking platform, bilingual from the start. Has sister company TravelGround.com, targeting an English speaking audience
    - One of the first travel websites to allow secure EFT payments. The site has a rigorous host verification process
    - Provides a basic extranet for property owners - micro B&Bs use the dashboard as their calendar to manage availability
    - Leverages LekkeSlaap Rewards - tiered rewards program that entitles users to discounted stays
    - Closed its social booking app, Viya, in 2025, with the decision to consolidate it all into the main LekkeSlaap brand
    - Expanded into Southern Africa

- **Conservio**
    - Founded: 2020
    - Funding: Raised $1 million USD in pre-seed funding led by E4E Africa, with participation from Volve Capital, Living Hope Ventures, and angel investors like Payfast founder Jonathan Smith
    - Product: acts a marketplace for nature-based travel, specialising in sustainable stays in South Africa, Mozambique and Namibia

- **Activatar**
    - Founded in 2010
    - Product: an independent SaaS booking and distribution platform for activities, tours and attractions
    - Activatar believes that the African activities market is still very DMC driven with many companies relying on that channel as their main source of revenue - saw the opportunity to open it up: “Africa has a low density of activity providers and a lot of the activity operators are very small and non technical or are owned by lodges who do not serve day visitors”
    - Activatar grew by 43% in 2023 and is “tweaking some aspects of our business model to further diminish the price perception influence of low price African systems”

- **ResRequest**
    - Founded in 2001, headquartered in Westville, KwaZulu-Natal
    - Product: Central Reservations System (CRS), PMS and CRM
    - Acquired in 2025 by Adapt IT through its Micros South Africa division, a company that provides touch-screen POS systems ubiquitous in South Africa
    - Built to solve for the African safari industry, particularly in scenarios with patchy internet, offering a solution that works offline at the lodge and then communicates bookings to the central reservations office when the internet is working
    - It is also designed to handle safari circuits, when a guest stays in different lodges during the same stay, and needs a bush-plane transfer between them
    - Deepened their partnership with Profitroom, using ResRequest for back office and Profitroom for the interface

4. Challenges: Environmental Risks, Regulatory Hurdles, and Digital Trust

- **Infrastructure challenges.** Travel businesses do not only need to plan for digital resources, but often basic resource security for water, power and internet connectivity systems in more rural locations

- **Safety perceptions.** According to the Travel & Tourism Development Index 2024, South Africa ranks 113th globally for safety and 97th for health and hygiene. These low rankings impact the confidence of both international travellers and hospitality investors, requiring ongoing public-private collaboration to build trust

- **Fall out from the Middle East conflict.** Nearly half of all transit air traffic to Africa passes through the Middle East. Cape Town Tourism's CEO, Enver Duminy, asserted that South Africa is "strongly connected to the world through Gulf hubs such as Dubai, Doha and Abu Dhabi. Those routes are critical to our long-haul access", but believes that there could still be an opportunity: "If we can show that we are open, accessible and ready to host travellers even as global routes shift, we will win"

- **Scrutiny over short term rental accommodation (STRA).** Airbnb has previously worked with Cape Town Tourism to develop a Live and Work Anywhere one-stop-shop hub, but STRAs will face a new Code of Good Practice whilst in the transition to an overhaul of tourism law, to ensure that its growth is sustainable. Tourism stakeholders' concerns centre on how enforceable the guidelines will be, with municipalities able to choose whether to use the code or not

- **Businesses are cautious over privacy implications in the implementation of AI.** 35% of businesses rate privacy and security concerns the top barrier to implementing AI, influenced by the POPI Act requirements

- **Climate crisis makes South Africa's tourism vulnerable.** 90% of funding for national parks comes from tourism - if tourism drops due to natural disasters, funding also drops. In Jan 2026, flooding in certain parts of the park saw Kruger tourist numbers drop by 41%

5. Opportunities

- **The African context.** Simply transplanting ideas grown from Western or even Asian environments doesn't apply. Solutions need to be shaped by South Africa's unique conditions, and can then be further honed, modified and rolled out across Southern Africa

- **Unlocking domestic tourism beyond day trips and direct trips**. Encouraging domestic travellers to make stopovers en route to their destination would generate additional value

- **The intra-Southern Africa opportunity**. 78% of all visitors were from SADC countries in Jan 2026, the vast majority of whom crossed over the land border. Having such a large potential source market who isn't dependent on air lift means that trips are more easily undertaken

- **The fintech overlap**. "Tourism is one of the largest foreign exchange earners for Africa. By digitizing and integrating the industry, we're able to move a lot of FX and provide ancillary fintech services like forex conversions and payouts" - David Gonahasa, founder of Tripesa. Launch Africa's Zachariah George agrees that fintech integration is key: "If you don't solve for fintech, it's almost impossible to solve for any other tech. As a founder you have to have an embedded financial solution in your offering no matter what vertical you work in."

6. Conclusion

Robust regional tourism + potential for increase in domestic tourism + acceleration of the fintech-travel industry overlap = high potential

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