

Sentiment Tracking Report

Q1 (2026/27)

Based on Jan – Mar 26 data



Purpose of the Sentiment Index

Understanding how people perceive a destination is critical to its success and long-term sustainability. This framework for the sentiment index aims to systematically track and manage perceptions across consumers who experience South Africa.

The sentiment index measures the level of user satisfaction from digital traces. Tracking the Sentiment Index will enable South African Tourism to communicate tourist perceptions of South Africa as a destination.

By doing so, it enables South African Tourism to guide marketing and communication strategies more effectively, enhance the overall visitor experience, protect and strengthen the destination brand.

It is worth noting that trade partners and media perceptions are already assessed through the annually planned Corporate Reputation Index. This sentiment framework, therefore, focuses specifically on understanding and evaluating perceptions within the visitor or consumer audience.





Methodology for Sentiment Data Collection

The sentiment score is derived using Natural Language Processing (NLP) and machine learning models applied to user-generated content such as online reviews, comments, and ratings. These models are specifically trained for the tourism sector, allowing for accurate interpretation of sentiment (positive, negative, neutral) in various contexts, including multilingual and nuanced content.

The data appeal platform aggregates data from over 130 reliable sources, including official tourism boards, government institutions, research bodies, booking platforms, geodata providers, and travel agencies. Each source is carefully vetted to ensure high quality and trustworthiness.

This extensive network enables the delivery of comprehensive insights across a wide range of topics—such as attractions, hospitality, transportation, events, and local conditions—providing a full and up-to-date picture of tourism destinations.



Data Source: Data Appeal.

Primary Data Sources

D/Al Destination aggregates and analyzes data from a broad set of publicly available and reputable online review platforms, including but not limited to:

- Google Reviews
- TripAdvisor
- Booking.com
- Expedia
- Hotels.com
- Metasearch engines like Trivago and Kayak
- Travel review platforms
- Social media channels
- Airbnb (limited metadata)
- Other travel-specific platforms (too granular to include)

These sources ensure a diverse and representative sample of user experiences across different industries and locations.

The logo for Google Reviews, featuring the word "Google" in its multi-colored font above the word "Reviews" in a black sans-serif font.The logo for TripAdvisor, consisting of a green circle with a white owl icon to the left of the word "TripAdvisor" in a bold black sans-serif font.The logo for Booking.com, featuring the word "Booking.com" in a bold blue sans-serif font.The logo for Expedia, featuring a blue circle with a white and yellow airplane icon to the left of the word "Expedia" in a bold blue sans-serif font.The logo for Hotels.com, featuring a stylized red "H" icon to the left of the word "Hotels.com" in a red sans-serif font.

INTEGRATION WITH REPORTING



Integration with other reporting

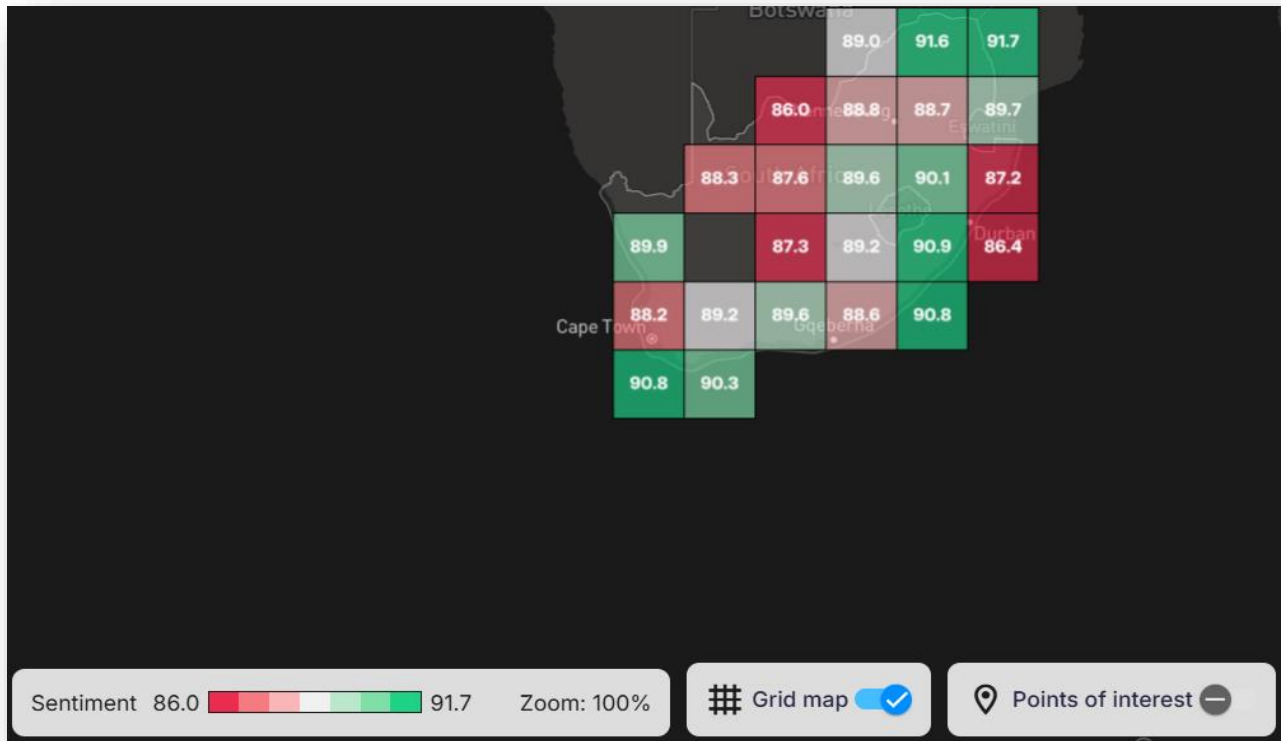
The sentiment score should not be used in isolation. It is most effective when complemented by other data sources. For example, sentiment is also measured through our Brand Tracker study, which includes a sentiment index, as well as through the Corporate Brand Index, which assesses perceptions among trade partners and stakeholders.

In addition to sentiment data, visitor satisfaction scores from the international departure survey can also be used. This survey captures the experience of international tourists as they leave the country, offering another valuable layer of insight.

It's important to note that the Data Appeal sentiment score has a big South African traveller footprint, making it particularly useful for understanding the domestic travel market, including insights by product category and province.

Sentiment Data Dimensions

The sentiment data dimensions provided by Data Appeal include product name, city, digital traces, category type, and the sentiment score itself. This data can be analyzed at various geographic levels, by province, for the country as a whole, and for specific local areas within South Africa. Sentiment scores are color-coded to easily distinguish between above-average and below-average sentiment.



DATA DIMENSIONS



PRODUCT NAME



CITY



DIGITAL TRACES



CATEGORY TYPE



SENTIMENT

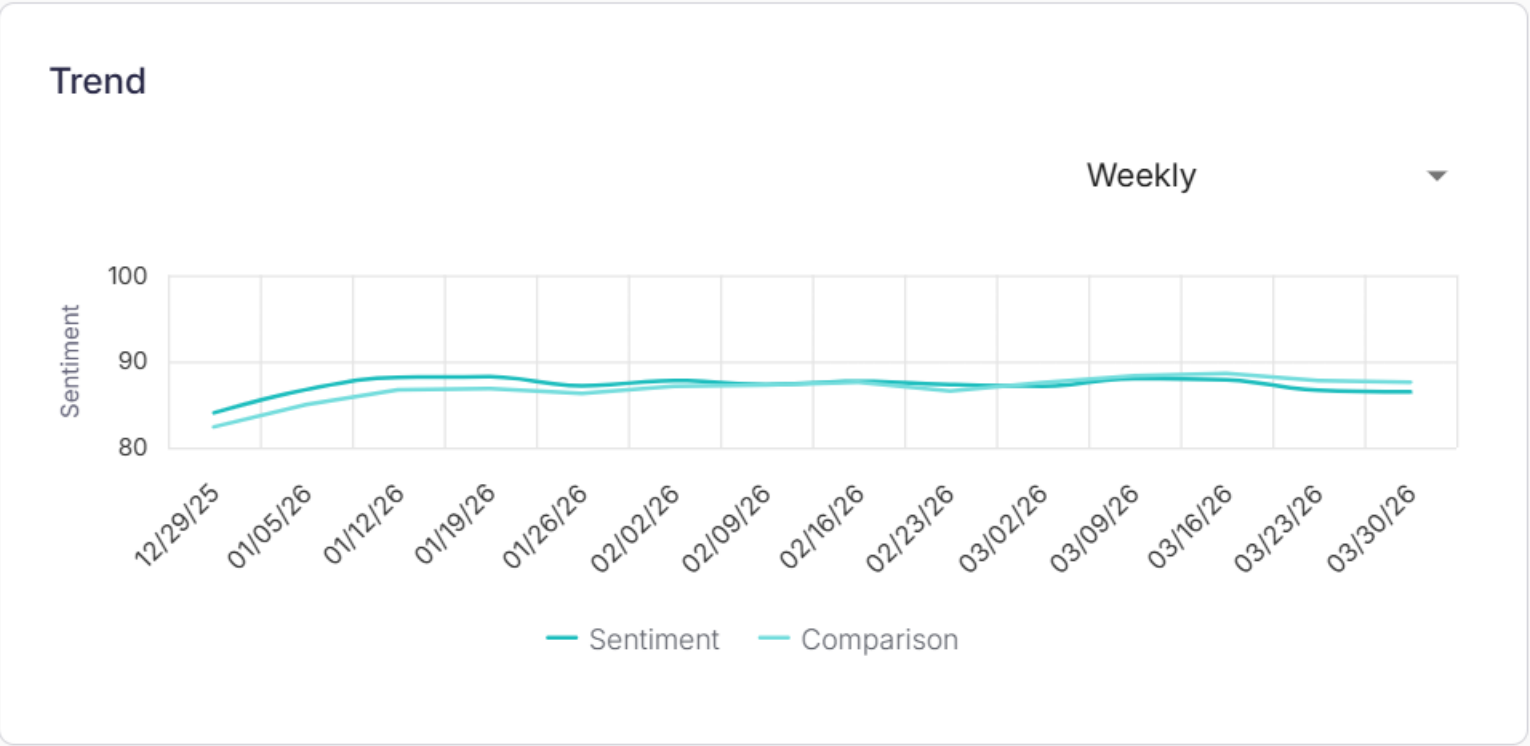
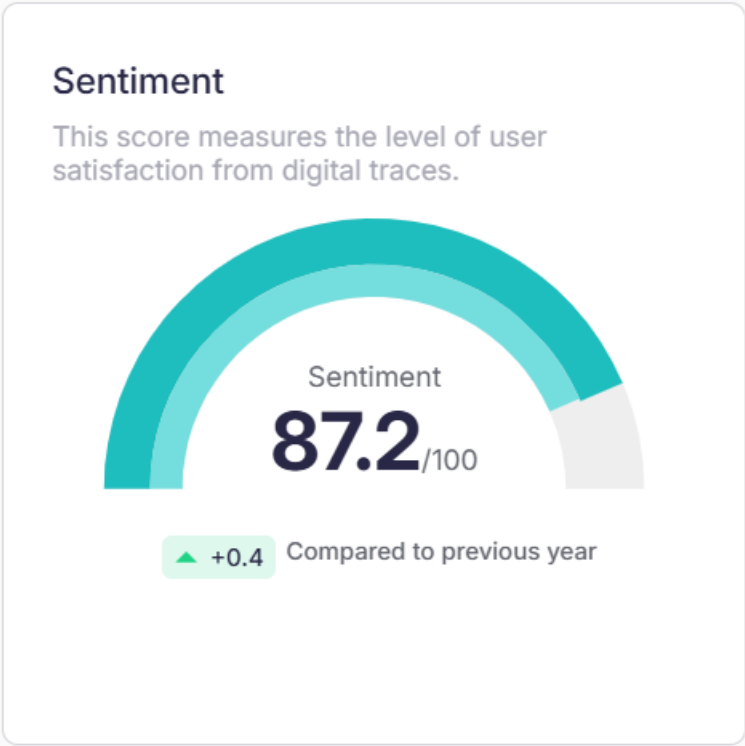


Sentiment

Jan to Mar 2026 - Performance

Overall Sentiment

The overall sentiment from January to March 2026 was 87.2, reflecting an improvement of 0.4 basis points. Over the past year, sentiment has consistently remained above the 80-point mark, indicating a generally positive outlook in South Africa. The recent uplift in sentiment is a positive and encouraging trend.



Positive and Negative Aspects

Overall, the strongest drivers of positive sentiment in South Africa are the quality of facilities and services, the overall experience and comfort provided by the industry, and the food and dining offerings.

On the other hand, the main detractors include the booking process, accessibility, economic factors, time management, as well as aspects of hospitality and accommodation quality.

While the overall sentiment score remains high, indicating that the positive drivers are particularly strong, there is a clear opportunity to address these weaker areas to further enhance South Africa's appeal as a destination.

Positive aspects

Facilities & services

Experience quality & comfort

Food & dining experience

To be improved

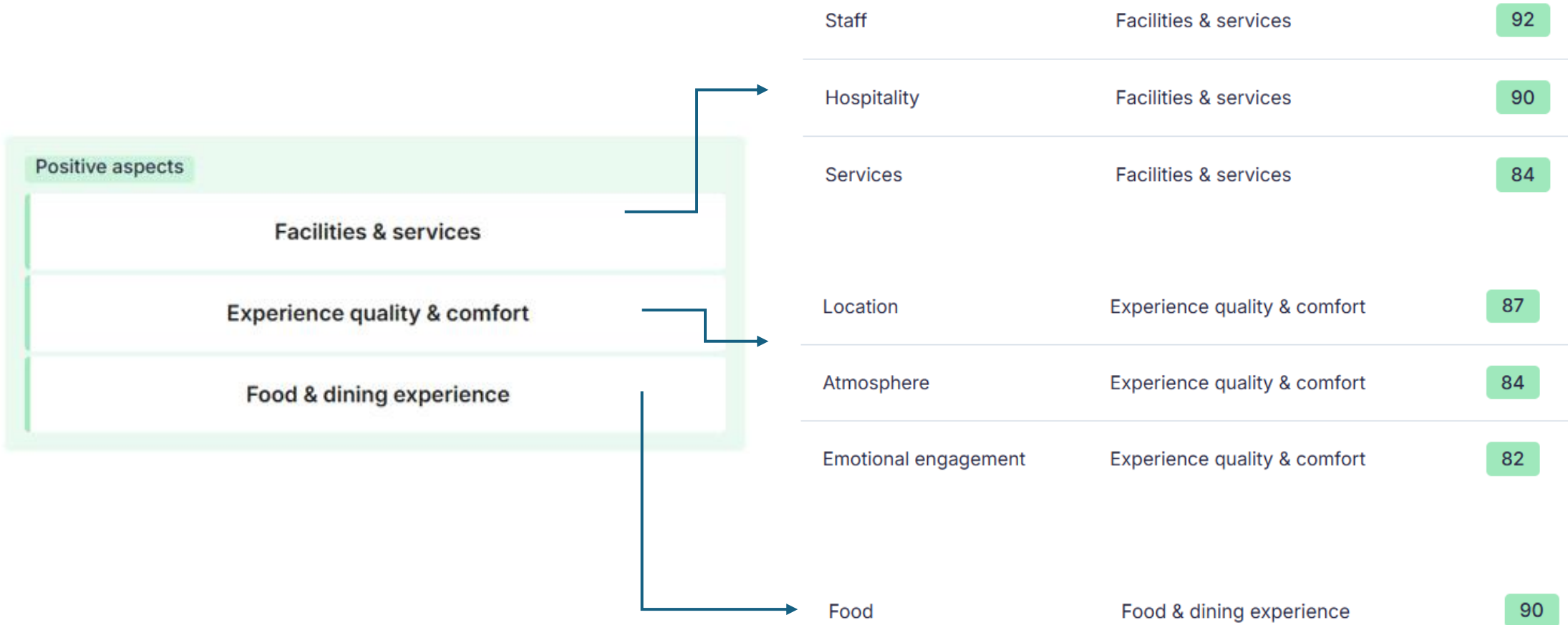
Booking process & access

Economic factors & time management

Hospitality & accommodation quality

The key drivers of positive sentiment are primarily the hospitality and services experienced by tourists. Visitors also value the location and overall atmosphere, which enhances the emotional connection to their experiences in South Africa.

While tourists are generally satisfied with the food and dining experience and it remains a strong performance driver, there are still opportunities for improvement when examined in more detail.



Scores represents Semantic Ratings

Positive aspects: Example of what consumers are saying:

Food & Beverage Excellence

“The dining options are a real highlight, with frequent mentions of delicious food and friendly service in nearly 590,000 reviews.”

Attractions Leave a Lasting Impression

“Landmarks like the V&A Waterfront (sentiment 93.7%) and Kirstenbosch National Botanical Garden (94.5%) are consistently praised by both local and international visitors.”

Hospitality & Accommodation Receive High Marks

“Staying at places like Belaire Suites Hotel and Radisson RED Cape Town V&A Waterfront is often described as comfortable and customer-oriented.”

Consistently Positive Experiences Across Traveller Types

“Couples and families alike mention how welcoming and accommodating services have enhanced their stay.”

International Appeal

“Guests from the UK highlight the friendly atmosphere, while German tourists appreciate the cleanliness and excellent food scene.”

High Praise for Service Elements

“Staff receive more than 37,000 positive mentions, reflecting dedication to visitor satisfaction.”

These quotes are supported by robust sentiment values and a continuous upward trend, demonstrating the destination's positive reputation and commitment to quality across various aspects.

Key detractors negatively impacting sentiment include dissatisfaction with the check-in and check-out processes, as well as the reservation experience. Tourists have also raised concerns around costs, waiting times, and the quality of rooms, kitchens, and cleanliness, particularly relating to toilets. In addition, there are comments highlighting a lack of privacy in some accommodation establishments, with inadequate separation between bathroom or toilet areas and the bedroom.



Scores represents Semantic Ratings

Negative aspects: Example of what consumers are saying:

Toilets and restrooms:

With over 3,000 reviews, issues relating to cleanliness or upkeep of toilets are reported frequently.

WiFi connection:

1,082 reviews highlight dissatisfaction, making connectivity a recurring concern.

Reservation procedures:

850 reviews reflect negative experiences during reservation, with concerns about ease or reliability.

Check-in & check-out experience:

1,754 reviews mention extended waiting times or administrative issues upon arrival and departure.

Waiting times:

Over 4,600 reviews report excessive waiting times for services or check-in.

Costs and value perception:

6,641 reviews cite dissatisfaction with pricing.

Room quality:

Over 16,000 reviews refer to issues such as room maintenance, comfort, or amenities.

Cleanliness:

17,687 reviews discuss deficiencies in cleaning standards of facilities or accommodations.

These negative aspects are consistent across a broad sample of guest feedback. For improvement, focusing on toilets, WiFi, reservation processes, and overall cleanliness are likely to yield the biggest gains in satisfaction.

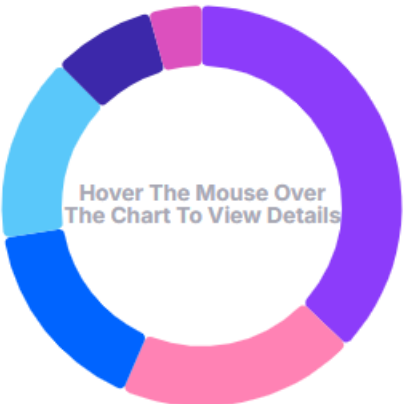
Among online topics, food and beverages generate the most discussion, followed by short-term rentals. The highest sentiment, however, is associated with food and beverages and tourist attractions.

Distribution of poi volume from selected industries

Percentage split and overall POI volume based on selected industries.

Industries Top 10 Categories

Total POI volume **100.4k**



- Food & Beverage
- Short Term Rentals
- Hospitality
- Attractions
- Transportation
- Entertainment

Include POIs with no digital traces

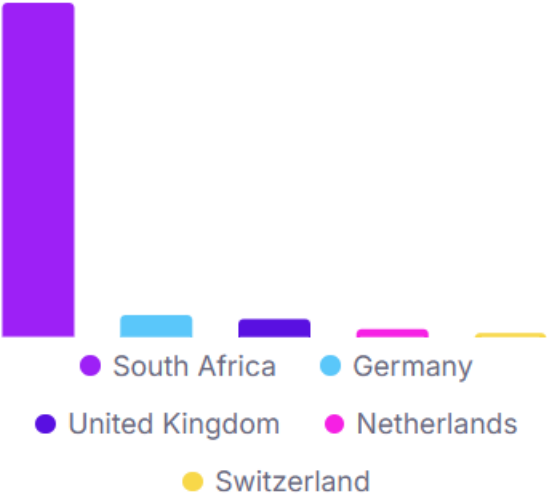
	POI distribution ↓	POI volume ↕	Sentiment ↕
🍴 Food & Beverage	37.2%	37.3k	90.0/100
🏠 Short Term Rentals	19.3%	19.3k	84.3/100
🏨 Hospitality	16.0%	16.1k	82.4/100
🎡 Attractions	15.0%	15.1k	90.2/100
🚗 Transportation	8.3%	8.3k	83.6/100

The majority of online conversations are driven by South Africans, accounting for approximately 76%, followed by contributions from Germany, the United Kingdom, and the Netherlands.

Top origin market

List of the top 20 origin markets (countries, regions, and provinces) ranked by digital trace distribution. Click any item to drill down into a specific selection.

Countries Regions/States Provinces/Counties

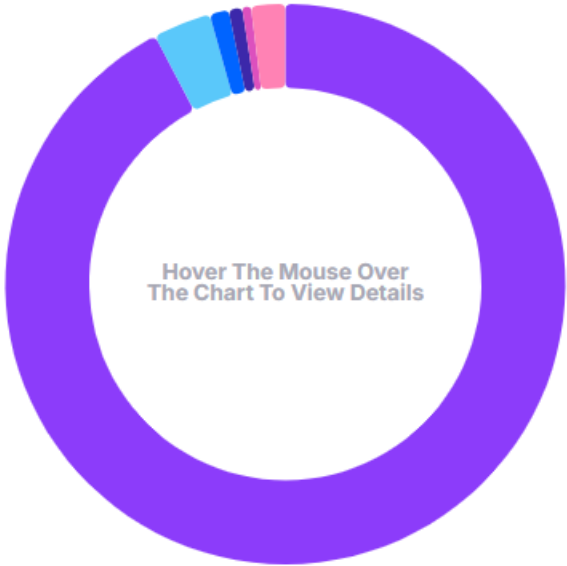


	Digital traces distribution	Sentiment
South Africa	75.8%	82.1/100
Germany	4.8%	87.1/100
United Kingdom	3.9%	87.5/100
Netherlands	1.9%	85.5/100
Switzerland	1.1%	86.0/100

English accounts for the vast majority of digital traces at 92%, followed by German and then Dutch.

Spoken languages

Digital traces distribution and average Sentiment based on spoken languages.



- English
- German
- Dutch
- French
- Afrikaans
- Others

	Digital traces distribution ↓	Sentiment ⇅
English	92.3%	86.1/100
German	3.4%	86.8/100
Dutch	1.1%	86.0/100
French	0.8%	84.4/100
Others	0.8%	83.7/100
Afrikaans	0.5%	89.2/100

	Digital traces volume ↓	Sentiment ↕
Location Gauteng	727.0k	87.7/100
Location Western Cape	642.5k	87.1/100
Location Cape Town	391.3k	86.5/100
Location Johannesburg	327.0k	87.5/100
Location KwaZulu Natal	295.7k	86.6/100

The highest volume of digital traces originates from Gauteng, followed by the Western Cape, with Cape Town noted at a city level.

KwaZulu-Natal ranks as the third-leading province in terms of digital activity.

In contrast, areas with lower volumes of digital traces but relatively strong sentiment include Kimberley, Mafikeng, the Eastern Cape, Jeffreys Bay, and Limpopo

	Digital traces volume ↕	Sentiment ↓
Location Kimberley	16.2k	90.6/100
Location Mafikeng	7.9k	89.0/100
Location Eastern Cape	128.3k	88.6/100
Location Jeffreys Bay	9.8k	88.6/100
Location Limpopo	92.5k	88.6/100

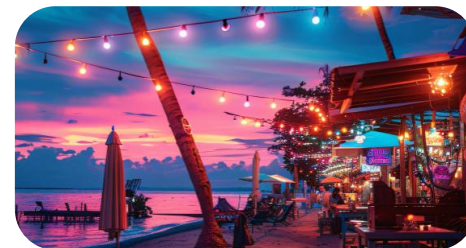
Summary

Visitor sentiment continues to strengthen, reflecting consistently positive and stable experiences across the destination. The food and beverage sector stands out as the primary driver of satisfaction, not only generating the most engagement but also shaping the overall perception of quality and vibrancy. Popular dining outlets and well-known food brands contribute to this strong appeal, reinforcing the destination's reputation as a compelling culinary offering.

International visitors, particularly from key European markets, demonstrate notably high levels of satisfaction, indicating strong alignment between the destination's offering and expectations of these travellers. This presents a clear opportunity to further target and engage these segments through tailored messaging and locally relevant storytelling.

Hospitality and staff interactions are also key strengths, with visitors frequently highlighting service quality, professionalism, and the welcoming nature of the experience. These human elements play an important role in enhancing emotional connection and overall trip satisfaction.

Together, these insights position the destination as a welcoming, experience-led environment with strong appeal driven by its dining experiences, high-quality service, and positive international perception, while also offering clear direction for targeted marketing and continued experience enhancement.



Strategic Recommendations

Strengthen Service Quality

Initiate refreshed staff training or recognition programs, as staff experience was referenced in over 37,000 reviews.

Improve Room and Facility Standards

Plan property upgrades, targeting quick wins in frequently mentioned areas such as cleanliness (sentiment: 66.4).

Enhance Service Efficiency

Implement queue management and streamline booking/check-in (check-in & check-out sentiment: 48.2).

Bolster Cleanliness Metrics

Launch visible daily cleaning routines and regular audits, especially in hospitality and high-traffic POIs.

Leverage Leading Food & Beverage Experiences

Cross-promote top-rated venues, create food-focused itineraries or events targeting international markets (e.g., DE, GB, NL visitors with high sentiment).

Target International High-Sentiment Markets

Non-local visitors from Germany (sentiment: 86.9), UK (87.4), and Netherlands (85.2) are highly satisfied and represent opportunity for further growth.

Develop tailored marketing and welcome services for these audiences, multilingual support, regional offers, or curated tours.

Invest in Process Optimization

Technical service points like WiFi (sentiment: 39.1) and reservation (39.7) are notably weak.

Prioritize digital upgrades, robust connectivity in hotels/POIs, frictionless mobile booking tools.

Boost Family and Group Offerings

Traveler type: Families (sentiment: 80) and groups (sentiment: 81.8) have slightly lower satisfaction.

Launch new family or group packages focusing on improvements in “family-friendly” areas (actual: 81.8 sentiment) and develop group itineraries.





Executive Summary:

Visitor sentiment remains strong and stable, with a slight improvement over the previous year.

Food and beverage stands out as the leading contributor, with very positive feedback and high visitor satisfaction.

Hospitality continues to perform well overall, although feedback is more mixed compared to food experiences. Positive experiences are driven by hospitality and staff, while cleanliness and service areas need improvement. Sentiment is positive across locations, with both smaller destinations and major cities showing encouraging trends.

Overall, South Africa is seen as a mature destination with strong appeal in food and hospitality, but there is still room to improve service-related aspects.



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**Thank
you!**