

Tourism Trend Analysis Report:

The Evolution of Leisure & Entertainment Expectations



SAT Insights Unit

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Our Research Approach

This report explores how destinations are integrating local and cultural elements into tourism itineraries, and highlights opportunities for the South African tourism industry to capitalise on this growing trend.

Desktop research was used to identify current digital trends in tourism. The process followed a three-fold matrix to identify recent trends. The matrix assesses the popularity, activity, and freshness of each trend. Freshness relates to the relative newness of an article; Activity – the number of people interacting with an article, including social media postings; and Popularity – the scoring of appeal based on how many people choose an article when given other options in the same category or cluster.

The selection of key trends was based on a relative score of 5 and above, with a high relative freshness.

Source: Trend Hunter

Executive Summary: The Evolution of Leisure & Entertainment Expectations

The travel industry is undergoing a clear shift toward more meaningful, participatory, and personalised experiences, as travellers increasingly prioritise depth, authenticity, and accessibility over traditional mass tourism offerings. Across emerging trends, travel is being redefined as an immersive system of cultural engagement rather than a transactional leisure activity.

A key development is the blending of food, culture, and entertainment, where culinary experiences are becoming central to destination discovery. Travel brands are moving beyond passive dining by creating food-led journeys that include market visits, farm experiences, chef collaborations, and regional food trails. This reflects a broader consumer desire to understand the stories, traditions, and cultural context behind cuisine, positioning food as a primary lens for exploring place and identity. At the same time, empowered, women-led travel experiences are reshaping expedition design. Female-focused itineraries led by local experts are gaining traction as travellers seek journeys that offer cultural depth, safety, and emotional resonance. This shift reflects the growing influence of women in travel decision-making and a broader preference for experiences aligned with personal values and meaningful engagement.

In parallel, immersive and participatory experiences are redefining travel and hospitality offerings. Dining experiences, in particular, are evolving into interactive formats that incorporate storytelling, role-play, and gameplay. These gamified social dining concepts respond to demand for more distinctive and memorable experiences, transforming eating out into a form of entertainment and shared social engagement rather than routine consumption. Accessible itinerary design is also emerging as a core pillar of travel innovation. Accessibility-focused planners and platforms are addressing long-standing barriers by curating mobility-friendly itineraries, vetted accommodation, and adaptive travel services. This reduces uncertainty and emotional stress for travellers with disabilities, enabling more confident and independent participation in travel experiences.

Finally, the rise of rare routes and alternative destinations reflects growing fatigue with mass tourism. Travellers are increasingly seeking lesser-visited locations, mystery itineraries, and secondary cities that offer more meaningful cultural connection and reduced congestion. This trend is driven not by status-seeking, but by a desire for better value, authenticity, and more intentional use of time and resources.

Collectively, these trends signal a broader industry transformation toward curated, experience-rich, and inclusive travel models that prioritise meaning, engagement, and accessibility over scale and standardisation.

Consumer Insights

Blending of Food, Culture, and Entertainment

Travelers are exploring local food cultures to shape immersive travel experiences

Trend: Travel brands are building food-led journeys that submerge travellers in local culinary systems through market visits, farm expeditions, chef collaborations, and regional food trails, positioning cuisine as a central lens for discovering place and identity within travel.

Insight: In a world of increasingly standardised experiences, travellers are still seeking exploration, but with a growing desire for deeper cultural connection and meaning. Due to this, dining is no longer just about consumption, but about understanding the context, traditions, and stories behind what's on the plate. This shift reflects a broader move away from surface-level excursions, ultimately reframing food as a gateway to more immersive and intentionally grounded travel.



Local-Led Culinary Experiences: Intrepid Offers a Diverse Range of Food Tours for Curious Travelers



Ten-Day Culture Tours: Trafalgar's Travel Guide Features Curated Music and Cuisine Destinations



Culinary-Focused Travel Experiences: EF Go Ahead Tours Launches the Food Tours Collection

Empowered Expedition

Women's journeys are reshaping travel through purpose-driven experiences

Trend: Travel companies are introducing female-focused adventures that prioritise women-led experiences, including itineraries guided by local female experts and culturally immersive journeys centered on women's perspectives and leadership.

Insight: As more women influence travel decisions and seek meaningful experiences, demand is growing for journeys that feel intentional and enriching. Female expeditions respond to this by offering deeper cultural engagement and a stronger sense of ease and belonging, moving beyond passive tourism toward more thoughtful travel. As such, this shift reflects a broader preference for experiences that align with personal values and deliver lasting significance.



Women's Travel Packages
Geographic Expeditions Launched its 'Women of the World Collection'

Immersive & Participatory Experiences

Fatal Feasts: Dining experiences integrate gameplay alongside food and beverage

Trend: Dining formats are evolving to incorporate interactive mystery elements alongside traditional meals. Restaurants and venues are introducing role-play, live storytelling and participatory gameplay, positioning dining as a social entertainment experience rather than a purely food-focused occasion.

Insight: As consumers dine out less frequently, they place greater emphasis on experiences that feel distinctive and worthwhile. Many now approach outings as intentional social occasions rather than routine activities, seeking engagement beyond standard service. Moreover, conventional formats can feel passive and easily replaceable, prompting a shift toward more dynamic environments. Interactive mystery elements respond to this by introducing novelty and memorability.



Murder Train Dinner Experiences
Napa Valley Wine Train Offers Various Murder Mystery Dinners



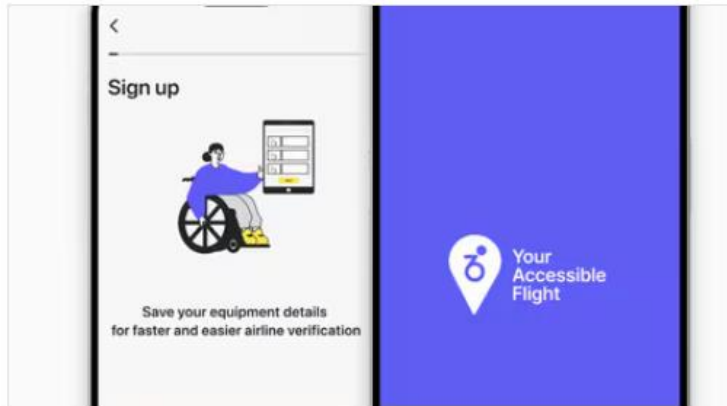
Dinner Escape Rooms
The Wedding Party Dinner Theater is a Three-Course Entertainment Event

Accessible Itinerary

Accessible Travel Planners Assist Clients with Unique Considerations

Trend: Travel planners and agencies are launching accessibility-focused travel plans that include mobility-friendly itineraries, sensory-considerate activities, vetted hotels, adaptive transportation, caregiver support options, and accessibility checks for clients with physical or mental considerations.

Insight: Many travellers with disabilities avoid or delay trips because planning feels overwhelming, risky, and full of unknowns. They worry about inaccessible hotels, stressful airport navigation, sensory overload, unreliable transportation, or activities that can't accommodate their needs. This pressure creates emotional and logistical barriers that make travel feel out of reach. Accessibility-focused planners respond by verifying accommodations and building itineraries that reduce anxiety.



Accessible Travel Planners
Your Accessible Flight Provides Wheelchair-Friendly Planning for Travel



Accessible Travel-Focused Airlines
The Global Brand Frontier Awards Recognized SATENA



Inclusive Tourism-Focused Campaigns
Orange County Has Collaborated with Wheel the World

Rare Routes

Travelers defy mainstream destinations to redefine modern adventure

Trend: Tour operators are rolling out travel products that steer travellers away from marquee hotspots and toward lesser-visited places. This includes “mystery” itineraries with undisclosed destinations, curated “Not Hot” destination lists, and packaged tours built around secondary cities, rural regions, and lesser-traveled routes.

Insight: In a busy world marked by rising costs and limited time, travellers are still seeking escape, but with a growing desire to avoid tourist traps and engage meaningfully with living cultures. Avoiding the mainstream has become less about signaling status and more about maximising return on time, money, and personal energy. This shift reflects a broader response to the excesses of mass tourism, reframing alternative destinations as intentional choices.



Lesser-Traveled Japan Tours
EF Adventures Launches its Japan Multi-Adventure



Underrated Travel Locations
Intrepid Travel Has Released Its Annual Not Hot List



Italian Tour Collections
EF Go Ahead Tours Launched 'Made with Amore'

Specific **Examples**

Local-Led Culinary Experiences



Intrepid Offers a Diverse Range of Food Tours for Curious Travelers

A diverse range of food tours offered by Intrepid Travel provides opportunities for meaningful cultural engagement through cuisine. Food plays a significant role in fostering human connection and cultural understanding, with culinary experiences often leaving lasting impressions on travellers.

Intrepid's locally led culinary experiences integrate its established grassroots travel approach with a focused exploration of regional food traditions.

Participants may sample traditional dishes, learn local cooking techniques, and take part in culturally significant dining practices, such as shared meals in community settings. Each activity emphasises authenticity and local knowledge, enabling a deeper appreciation of both food and cultural context.

Developed for travellers with an interest in gastronomy, these experiences combine elements of cultural discovery and experiential travel. Offerings range from short itineraries to extended culinary journeys, encouraging participants to engage with local customs.

Overall, these programmes position food as a medium for cultural insight, connection, and immersive exploration.

Ten-Day Culture Tours

Trafalgar's Travel Guide Features Curated Music and Cuisine Destinations

The *Tastes and Sounds of the South* tour from Trafalgar is a ten-day programme that traces key cultural, musical, and culinary landmarks across Nashville, Memphis, Natchez, and New Orleans. The itinerary includes guided visits to sites such as RCA Studio B, the Country Music Hall of Fame, the Johnny Cash Museum, and the Grand Ole Opry, providing participants with historical context and exposure to influential figures in American music.

Additional stops in Memphis include Beale Street, the National Civil Rights Museum, Graceland, and Sun Studio, each contributing to an understanding of the region's artistic and social heritage.

The tour also incorporates cultural immersion experiences such as a *Be My Guest* dinner in Natchez, a visit to Frogmore Plantation to learn about cotton production and regional history, and a jazz dinner cruise in New Orleans. Participants explore the cities' neighbourhoods, museums, and culinary traditions, with optional experiences including swamp tours and cooking classes focused on Creole cuisine.

Throughout the itinerary, the programme combines structured excursions with periods of independent exploration, offering travellers a comprehensive introduction to the historical and contemporary influences that shape the American South.



Culinary-Focused Travel Experiences

EF Go Ahead Tours Launches the Food Tours Collection

EF Go Ahead Tours has introduced an expanded portfolio of culinary journeys under the title *Food Tours*. This culinary adventure-focused collection was developed in collaboration with America's Test Kitchen and designed to facilitate cultural immersion through regional gastronomy.

The *Food Tours* guided itineraries are structured around three specialised categories, general culinary exploration, combined food and wine excursions, and premium partner-led tours. These experiences cater to small groups and include activities such as market visits, cooking classes, and producer demonstrations across destinations ranging from Southeast Asia to Europe.

Through these offerings, EF Go Ahead Tours responds to growing consumer demand for authentic, experiential travel by moving beyond conventional restaurant dining to include hands-on participation and engagement with local artisans. This approach deepens the storytelling and educational aspects associated with regionally distinctive cuisine.



Women-Led Travel Journeys



Women-Led Travel Journeys

Geographic Expeditions has introduced the *Women of the World Collection*, a series of travel experiences led by and centred on women.

These journeys connect travellers with female leaders, artisans, and conservationists, placing emphasis on cultural exchange and insight beyond conventional tourism experiences. The initiative reflects broader industry trends, as women influence more than 82% of travel decisions, while solo female travel continues to grow, particularly among travellers over the age of 45.

The collection includes two itineraries. *Namibia's Wild Wonders* is a 12-day safari featuring female rangers, conservation discussions with the AfriCat Foundation, and engagements with entrepreneurs in Windhoek, alongside visits to Sossusvlei and the Skeleton Coast.

Meanwhile, *Treasures of Türkiye* is a 12-day cultural journey incorporating experiences with female historians, a women-run weaving co-operative, a farm-to-table dining experience, and a private gulet cruise to historic coastal destinations.

Both itineraries are designed to foreground women's perspectives while supporting local communities and fostering meaningful, place-based cultural understanding.

Murder Train Dinner Experiences



Napa Valley Wine Train Offers Various Murder Mystery Dinners

The Napa Valley Wine Train *Murder Mystery* experience offers a fully immersive evening that combines live theatre, dining, and interactive storytelling within a distinctive mobile setting. Hosted aboard a restored vintage train, the experience transforms the journey into a cinematic, film noir-inspired environment where guests become active participants in the unfolding narrative.

Available on selected dates, the experience places attendees at the centre of the action — either working to identify a hidden culprit or discreetly playing a role within the mystery themselves. Throughout the journey, guests are served a three-course gourmet meal.

Produced by The Murder Mystery Company, the programme features a rotating selection of themed storylines designed to encourage repeat visitation and varied audience engagement. Popular titles include *'Til Death Do Us Part*, *Midnight at the Masquerade*, and *Death of a Gangster*, each incorporating suspenseful characters, unexpected plot twists, and audience interaction.

Dinner Escape Rooms



The Wedding Party Dinner Theater is a Three-Course Entertainment Event

The *Wedding Party Dinner Theater* offers an immersive dining concept that combines escape room mechanics with live, interactive performance. Framed within a wedding-themed narrative, guests are encouraged to engage directly with unfolding events, contributing to a storyline shaped by collaboration, decision-making, and puzzle-solving. This participatory format transforms the traditional dining experience into a dynamic, experience-led environment.

Attendees are seated in small shared groups, encouraging interaction and collective problem-solving among participants, including those meeting for the first time. The format mirrors the social atmosphere of a wedding reception while introducing elements of suspense and gameplay.

The experience is complemented by a curated three-course menu, beginning with seasonal soup and artisan bread, followed by a selection of main course options and concluding with a dessert course. Accommodations are available for a range of dietary preferences.

Branded Drama

Brands are leveraging reality-drama and telenovela-style content

Trend: While reality TV and telenovelas remain staples of entertainment, brands are increasingly adopting their emotional or exaggerated intensity, heightened storytelling, and episodic suspense to power product launches and campaigns that aim to sustain attention and build anticipation.

Insight: As consumers face increasing advertising and social media fatigue, capturing attention has become more challenging. In response, some brands are incorporating dramatised, entertainment-led storytelling that mirrors how audiences already consume content, as serialised narratives create emotional hooks and continuity; making products feel embedded in everyday life rather than disruptive advertisements, as characters and integral components to a story in ways that feel memorable and aligned with contemporary viewing behaviours.



Telenovela-Inspired Safety Videos
Philippine Airlines Unveiled 'Care That Comes From The Heart'



Telenovela-Inspired Beauty Campaigns
e.l.f. Cosmetics' Big Game Ad Airs Ahead of Halftime

Telenovela-Inspired Beauty Campaigns



e.l.f. Cosmetics' Big Game Ad Airs Ahead of Halftime

Spanish-language rap artist Bad Bunny is set to perform the halftime show at the Super Bowl, encouraging brands to incorporate cultural relevance and representation into their campaigns. One example is e.l.f. Cosmetics' telenovela-inspired Big Game campaign starring Melissa McCarthy.

The campaign also features actor and television personality Nicholas Gonzalez, telenovela actress Itatí Cantoral, and e.l.f. Glow Reviver Lip Oil as central elements within a storyline centred on love, betrayal, and comedy. The narrative follows McCarthy's character, who has just one day to learn Spanish before attending the biggest reggaeton concert in America. In an unexpected twist, the lip oil becomes the unlikely hero, helping her roll her Rs correctly.

In partnership with Duolingo, the affordable beauty brand is also offering a complimentary Super Duolingo subscription to all e.l.f. Beauty Squad loyalty members, allowing them to learn Spanish without advertisements.

Telenovela-Inspired Beauty Campaigns



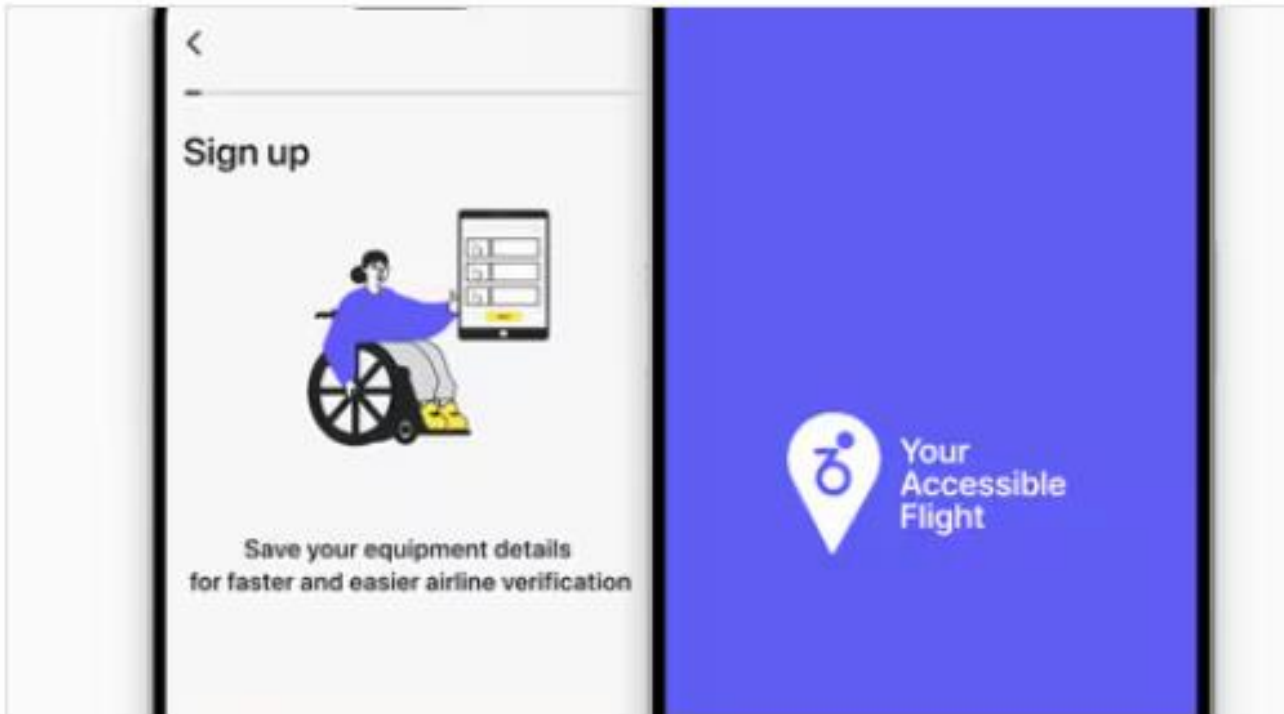
Philippine Airlines Unveiled 'Care That Comes From The Heart'

Philippine Airlines (PAL), in collaboration with BBDO Guerrero, reimagined the standard in-flight safety briefing by transforming its safety video into an engaging narrative experience inspired by Filipino telenovelas.

Titled *Care That Comes From The Heart*, the video reframes safety procedures as an unfolding drama, using humour, heightened emotion, and familiar storytelling tropes to capture passengers' attention. Rather than relying on conventional demonstrations, the production integrates safety instructions into dramatic scenes designed to be both entertaining and informative.

This creative approach makes safety content more accessible and memorable, encouraging passengers to engage more attentively instead of disengaging during the briefing. By combining regulatory communication with culturally recognisable entertainment formats, the "Safety-novela" illustrates how safety messaging can remain compliant while also being engaging and playful.

Accessible Travel Planners



Your Accessible Flight Provides Wheelchair-Friendly Planning For Travel

Your Accessible Flight is a mobile application designed to support travellers with mobility challenges, including wheelchair users, in planning and managing air travel. The app provides tools for trip planning, including flight searches, itinerary organisation, and information relating to airport accessibility features.

The platform highlights services such as accessible check-in counters, boarding assistance, restroom accessibility, and airport navigation support. Its primary aim is to reduce travel barriers by offering reliable, real-time information on facilities and accommodation services, helping to create a smoother and more predictable travel experience.

By centralising accessibility-related data, *Your Accessible Flight* enables users to make more informed decisions about airlines and airports while minimising unexpected challenges during their journey. The app's design prioritises usability and accessibility, empowering travellers with disabilities to independently plan trips, access essential services, and experience a more seamless and less stressful air travel process.

Accessible Travel-Focused Airlines



The Global Brand Frontier Awards Recognised SATENA

SATENA, Colombia's national airline, has been recognised by the Global Brand Frontier Awards for its pioneering efforts to improve air travel accessibility across Colombia's challenging geographic regions.

The award acknowledges the airline's strategic deployment of small-capacity, fuel-efficient aircraft capable of serving remote areas with limited airport infrastructure, alongside its implementation of a hub-and-spoke system that strengthens connectivity between major cities and underserved communities.

In 2024 alone, SATENA carried over 900,000 passengers. The airline is also planning to expand its fleet with eight specialised de Havilland Canada DHC-6 Twin Otter aircraft, designed for operations in difficult terrain and remote environments.

These forward-looking initiatives, together with recognition from the Global Brand Frontier Awards, underscore SATENA's commitment to social integration through transport solutions that help bridge both geographic barriers and economic disparities in air travel access.

Accessible Travel-Focused Airlines



Orange County Has Collaborated with Wheel the World

Orange County Tourism & Film has entered into a collaboration with the leading accessible travel platform Wheel the World. The aim of this partnership is to enhance tourism opportunities for people with disabilities and ensure they can fully experience the region's diverse attractions.

Orange County Tourism & Film and Wheel the World focus on verifying and promoting accessibility at popular destinations, including LEGOLAND® New York Resort, Storm King Art Center, and the United States Military Academy at West Point, among others. Wheel the World's trained evaluators assess these locations to gather detailed accessibility information, which is then shared with travellers through its *Destination Verified* programme.

This accessibility-focused partnership reflects Orange County Tourism & Film's commitment to inclusivity. By providing verified accessibility data, the collaboration helps remove uncertainty and enables travellers to confidently plan visits to attractions, dining establishments, and accommodation options.

Lesser-Travelled Japan Tours



EF Adventures Launches its Japan Multi-Adventure

EF Adventures introduces the *Japan Multi-Adventure: The Japanese Alps & Shikoku*, a 12-day journey (or 14 days with a Kyoto extension) designed to reveal Japan's quieter, lesser-travelled side beyond its major metropolitan centres. Priced from \$6,899 before flights, the itinerary combines hiking, cycling, rafting, and cultural exploration, offering a balance of physical activity and reflective travel across diverse landscapes.

From the alpine beauty of Kamikōchi's mountain valleys to the island-hopping bridges of the Seto Inland Sea, travellers encounter Japan's contrasting natural and cultural environments. Highlights include paddling on Lake Nojiri, rafting through Oboke Gorge, climbing 1,368 steps to Kotohira-gū (Konpira Shrine), and cycling the world-renowned Shimanami Kaidō.

Immersive experiences further enrich the journey, including stays in boutique ryokans, relaxation in Dōgo Onsen, explorations of Himeji Castle, and meals ranging from Osaka's vibrant street food scene to refined kaiseki cuisine. The result is an itinerary that reflects Japan's rhythm, heritage, and understated natural beauty.

Underrated Travel Locations



Intrepid Travel Has Released Its Annual Not Hot List

Intrepid Travel has released its annual curated list of destinations the Not Hot List. It identifies ten geographical locations that currently receive a relatively small number of international visitors but are deemed prepared for increased tourism due to recent infrastructure developments or cultural initiatives.

A valuable travel resource, the selection process for the Intrepid Travel Not Hot List involves internal regional specialists and external trend analysis, with criteria focusing on a destination's low visitor numbers, improved readiness for tourism, and specific relevance for the upcoming year.

In order to capitalise on the momentum of the Not Hot List, Intrepid Travel also announced the launch of new guided tours to several of the featured places, including Sierra Leone, Kyrgyzstan, and Romania.

Italian Tour Collections



EF Go Ahead Tours Launched 'Made with Amore'

'Made with Amore' is a new campaign from EF Go Ahead Tours, a global tour operator specialising in guided travel for individuals, families, and groups. The initiative is designed to encourage travellers to explore parts of Italy that are often overlooked, offering opportunities to visit lesser-known regions and experience the country beyond its most popular destinations.

While most visitors "see only about 1% of Italy's well-known attractions, Made with Amore focuses on showcasing the remaining 99%, including smaller towns, rural landscapes, and local cultural sites that reflect Italy's diversity and heritage."

Through guided tours, the campaign aims to provide deeper cultural engagement and a broader understanding of the country's geography and traditions. This approach highlights how structured travel experiences can support more balanced tourism and introduce travellers to a wider range of Italian destinations.



THANK YOU



SOUTH AFRICAN TOURISM