



SOUTH AFRICAN TOURISM

# Sustainability Index Report

National and Provincial Destination Sustainability Index

Insights Unit

April. – June. 2026 | Q1

Based on April & May data

# Executive Summary

South Africa's **Destination Sustainability Index (DSI)** declined marginally to **86.2/100** for the **April–May 2026** period, down from **86.5/100** during the same period in 2025. While the overall score remains high, the slight decline reflects emerging sustainability challenges, particularly in overtourism management and socio-cultural sustainability. Improvements in the **Environmental** and **Destination Management** pillars demonstrate continued progress in environmental stewardship, governance, and community engagement. However, these gains were offset by declines in the **Overtourism** and **Social-Cultural** pillars.

The decline in the Overtourism pillar was primarily driven by weaker performance in the OTA Intermediary Index, indicating an increasing reliance on online travel agencies, as well as the Tourism Supply Pressure Index, highlighting growing pressure on tourism infrastructure and distribution channels. The Social-Cultural pillar also weakened due to lower performance in the Public Transportation and Urban Green indices, signalling the need for continued investment in sustainable mobility and urban liveability to support destination resilience.

Provincial performance was mixed across the country. The Western Cape recorded the highest DSI (87.2) and improved year-on-year, supported by stronger environmental, social-cultural, and destination management performance. The Eastern Cape, Free State, Northern Cape, and Gauteng also recorded improvements, reflecting positive progress in governance, environmental management, and sustainable destination development. In contrast, KwaZulu-Natal, Limpopo, and North West experienced declines, largely driven by weaker performance in the overtourism and social-cultural pillars, with KwaZulu-Natal showing deterioration across all four sustainability pillars. Mpumalanga maintained a stable performance, supported by continued strength in environmental management and destination governance.

# Executive Summary

Overall, the findings suggest that South Africa continues to perform well as a sustainable tourism destination, with strong governance and environmental management underpinning its performance. However, sustaining long-term competitiveness will require targeted interventions to improve sustainable transport, diversify tourism distribution channels, manage tourism growth pressures, and strengthen the socio-cultural dimensions of destination sustainability. Addressing these challenges will be critical to maintaining South Africa's position as a resilient and sustainable tourism destination.



# Methodology and Objective

The Destination Sustainability Index developed by Data Appeal is based on a comprehensive, multi-layered approach rather than a single algorithm. The methodology integrates established sustainability frameworks, advanced artificial intelligence techniques, and objective environmental data to generate a composite indicator of destination sustainability.

The process includes the following components:

- **ETIS Framework:** The European Tourism Indicator System (ETIS) provides the conceptual foundation for assessing tourism sustainability. It guides the selection of indicators and ensures that the analysis aligns with internationally recognized sustainability standards.
- **Semantic and Sentiment Analysis:** Using AI-driven semantic analysis, tourist reviews from online platforms (e.g., TripAdvisor) are examined to measure visitor sentiment and satisfaction. This step identifies strengths and weaknesses within a destination, offering qualitative insights that complement traditional sustainability indicators.
- **Satellite Environmental Data:** Independent, third-party satellite monitoring data is integrated to provide accurate and objective measurements of environmental conditions. This ensures the index reflects real-world environmental performance beyond self-reported metrics.
- **Composite Indicator Construction:** Insights from the ETIS framework, sentiment analysis, and satellite data are aggregated into a composite index. This index delivers a holistic, data-driven measure of a destination's sustainability performance.

Through this methodology, Data Appeal combines diverse data sources and analytical techniques to produce a robust and transparent assessment of sustainability, moving beyond traditional survey-based or self-reported approaches.



# Methodology and Objective

## What is the Destination Sustainability Index?

The Destination Sustainability Index is a vital tool for assessing and measuring the sustainability of a tourist destination. This index is built upon four fundamental pillars: the social and cultural pillar, the overtourism pillar, the destination management pillar, and the environmental pillar.

- **Social-Cultural Pillar:** This pillar focuses on the impact of tourism on the local community and the destination's culture. It assesses how tourism affects the daily lives of people, the preservation of cultural traditions, and the community's social well-being.
- **Overtourism Pillar:** This pillar evaluates how well a destination can sustainably manage tourist flows, avoiding overcrowding and associated damages. It assesses the impact of overtourism on a destination, considering various indicators, such as tourism flows, pressures on tourism supply, population density, and the satisfaction of the local community.
- **Destination Management Pillar:** This pillar concentrates on the effectiveness of tourism management strategies and policies the destination adopts. It focuses on a destination's perception, confidence, and overall success.
- **Environmental Pillar:** This pillar assesses the environmental impact of tourism on the destination. It examines the management of natural resources, pollution reduction, and other sustainable practices related to the environment. The pillar enables the assessment of factors like greenery, natural surroundings, pollution levels, and air quality to meet the needs of visitors while nurturing a better life environment for host citizens.

## Objective of This Report

The objective of this report is to present a comprehensive assessment of South Africa's Destination Sustainability Index performance for January–December 2025, analyse key trends and pressure areas across sustainability pillars, and establish provincial baselines that will support ongoing monitoring, informed decision-making, and targeted sustainability initiatives across the tourism sector.



# National Index

DESTINATION SUSTAINABILITY INDEX

# DESTINATION SUSTAINABILITY INDEX | SA

South Africa’s Destination Sustainability Index for April–May 2026 is 86.2/100, down from 86.5/100 for the same period in 2025. The Environmental and Destination Management pillars showed improvements, while the Overtourism and Social-Cultural pillars declined compared to the previous period.



Destination Sustainability Index	▼ <b>86.2</b> /100 86.5/100
Social-Cultural Pillar	▼ <b>88.8</b> /100 89.6/100
Destination Management Pillar	▲ <b>92.1</b> /100 91.8/100
Overtourism Pillar	▼ <b>77.4</b> /100 78.4/100
Environmental Pillar	▲ <b>86.7</b> /100 86.1/100

*NB: A higher overtourism score indicates a situation where tourism is well-managed, positively impacts the destination and local communities, and offers a high-quality tourism experience.*

**NB:** 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.

Source: Data Appeal – Destination AI

# DESTINATION SUSTAINABILITY INDEX | SA

All sub-indices within the Environmental and Destination Management pillars recorded increases. The Social-Cultural pillar declined, driven by a decrease in the Public Transportation index and Urban Green Index. The Overtourism pillar also declined, driven by a decrease in the OTA Intermediary index and Tourism Supply Pressure Index.

Social-Cultural Pillar	▼ <b>72.7</b> /100 73.1 /100	Destination Management Pillar	▲ <b>92.5</b> /100 92.1 /100	Overtourism Pillar	▼ <b>76.9</b> /100 79.4 /100	Environmental Pillar	▲ <b>87.1</b> /100 85.7 /100
Cultural Index	▲ <b>65.3</b> /100 61.9 /100	Sentiment Index	▲ <b>88.9</b> /100 88.4 /100	Tourism Pressure Index	▲ <b>93.3</b> /100 93.2 /100	Nature Coverage Index	= <b>93.7</b> /100 93.7 /100
Urban Green Index	▼ <b>59.7</b> /100 65.3 /100	Travel barometer Index	▲ <b>97.3</b> /100 97.2 /100	Tourism Supply Pressure Index	▼ <b>81.9</b> /100 88.1 /100	Air Quality Index	▲ <b>80.5</b> /100 77.7 /100
Public Transportation Index	▼ <b>86.3</b> /100 86.9 /100	Seasonal Balance Index	▲ <b>86.8</b> /100 85.5 /100	OTA Intermediary Index	▼ <b>34.0</b> /100 34.5 /100		
Inclusivity Index	= <b>100</b> /100 100 /100						

**NB:** 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.

Source: Data Appeal – Destination AI

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# DESTINATION SUSTAINABILITY INDEX | SA

South Africa's Destination Sustainability Index declined to to **86.2/100** for April – June 2026, down from **86.5/100** in 2025, reflecting a decline in sustainable practices and responsible destination management. Growth in the **Environmental** and **Destination Management** pillars highlights strengthened community engagement and governance standards.

However, declines in the Overtourism and Social-Cultural pillars point to areas needing focused intervention. The overtourism decline is primarily driven by the OTA Intermediary Index (34.0), indicating heavy reliance on OTAs and the need for more diversified distribution channels and Tourism Supply Pressure Index (81.9).

The Social-Cultural pillar's dip is linked to a decrease in the Public Transportation and Urban Green sub-index. Sustained efforts in these sensitive areas will be essential to maintaining and further improving South Africa's destination sustainability performance.

# Provincial Index

Provincial DSI



# Western Cape

The Western Cape's DSI for 2026 (April – May) is 87.2/100, up from 86.4/100 during the same period in 2025. This improvement is largely driven by stronger performance in the Environmental, Social Cultural and Destination management pillars.



Destination Sustainability Index **87.2**/100  
86.4/100

Social-Cultural Pillar **92.0**/100  
91.7/100

Destination Management Pillar **92.2**/100  
88.7/100

Overtourism Pillar **76.1**/100  
77.2/100

Environmental Pillar **88.5**/100  
87.9/100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# Eastern Cape

The Eastern Cape's DSI for 2026 (April – May) is 83.0/100, up from 81.3/100 during the same period in 2025. This improvement is largely driven by strong performance in the Overtourism, Destination management and Social-Cultural pillars.



Destination Sustainability Index **83.0**/100  
81.3/100

Social-Cultural Pillar **75.3**/100  
71.3/100

Destination Management Pillar **91.2**/100  
88.2/100

Overtourism Pillar **78.7**/100  
78.5/100

Environmental Pillar **87.0**/100  
87.1/100

**NB:** 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# North West

North West's DSI for 2026 (April – May) is **82.7/100**, down from **83.3/100** during the same period in 2025. This decline is largely driven by a drop in performance in the **Social Cultural, Overtourism, and Environmental** pillar.



Destination Sustainability Index **82.7**/100  
83.3/100

Social-Cultural Pillar **77.9**/100  
78.4/100

Destination Management Pillar **91.7**/100  
91.2/100

Overtourism Pillar **79.0**/100  
80.4/100

Environmental Pillar **82.1**/100  
83.3/100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# KwaZulu Natal

KwaZulu Natal's DSI for 2026 (April – May) is 82.2/100, down from 83.2/100 during the same period in 2025. This decline is largely driven by a decline in performance of all the pillars.



Destination Sustainability Index **82.2**/100  
83.2/100

Social-Cultural Pillar **81.7**/100  
82.9/100

Destination Management Pillar **91.1**/100  
92.2/100

Overtourism Pillar **73.5**/100  
74.9/100

Environmental Pillar **82.7**/100  
83.0/100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# Free State

The Free State's DSI for 2026 (April – May) is 81.9/100, up from 81.2/100 during the same period in 2025. This improvement is largely driven by strong performance across all pillars.



Destination Sustainability Index **81.9**/100  
81.2/100

Social-Cultural Pillar **73.3**/100  
72.7/100

Destination Management Pillar **90.9**/100  
90.6/100

Overtourism Pillar = **79.1**/100  
79.1/100

Environmental Pillar **84.5**/100  
82.6/100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# Northern Cape

The Northern Cape's DSI for 2026 (April – May) is 81.9/100, up from 81.8/100 during the same period in 2025. This improvement is largely driven by stronger performance in the Destination management pillars.



Destination Sustainability Index **81.9**/100  
81.8/100

Social-Cultural Pillar **66.6**/100  
68.0/100

Destination Management Pillar **89.7**/100  
87.5/100

Overtourism Pillar **80.2**/100  
80.7/100

Environmental Pillar **91.1**/100  
91.1/100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# Gauteng

Gauteng's DSI for 2026 (April – May) is 80.9/100, up from 80.7/100 during the same period in 2025. This improvement is largely driven by strong performance in the Environmental pillars.



Destination Sustainability Index **80.9** /100  
80.7 /100

Social-Cultural Pillar **83.0** /100  
85.1 /100

Destination Management Pillar **91.8** /100  
92.0 /100

Overtourism Pillar **83.1** /100  
83.6 /100

Environmental Pillar **65.5** /100  
62.1 /100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# Mpumalanga

Mpumalanga's DSI for 2026 (April – May) is 80.3/100, on par at 80.3/100 during the same period in 2025. This performance is largely driven by strong performance in the Destination Management, and Environmental pillars.



Destination Sustainability Index	▲ <b>80.3</b> /100 80.3 /100
Social-Cultural Pillar	▼ <b>80.2</b> /100 83.4 /100
Destination Management Pillar	▲ <b>92.2</b> /100 91.3 /100
Overtourism Pillar	▼ <b>65.9</b> /100 66.3 /100
Environmental Pillar	▲ <b>82.9</b> /100 80.0 /100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# Limpopo

Limpopo's DSI for 2026 (April – May) is 78.5/100, down from 81.2/100 during the same period in 2025. This decline is largely driven by a decline in performance in the Social-Cultural, and Overtourism pillars.



Destination Sustainability Index **78.5**/100  
81.2/100

Social-Cultural Pillar **56.2**/100  
66.2/100

Destination Management Pillar **92.3**/100  
91.6/100

Overtourism Pillar **78.4**/100  
82.5/100

Environmental Pillar **87.0**/100  
84.7/100

NB: 2026 values are shown in bold, while 2025 values are presented in regular (non-bold) text.  
Source: Data Appeal – Destination AI

# Appendix A

## Pillar Definitions

# SOCIAL-CULTURAL PILLAR INDEX

## What is the Social-Cultural Pillar Index?

The Social-Cultural Pillar Index measures the impact of tourism on the social and cultural aspects of a destination. It focuses on the effects of tourism on both the social and cultural aspects of a destination, such as the presence and quality of urban green, the destination's cultural vitality and reputation, and general accessibility in terms of public transportation. This index is divided into four distinct sub-indices, namely: Cultural Index, Urban Green Index, Public Transportation Index, and Inclusivity Index.

The index value scale provides a precise classification of the performance of each sub-index and the destination as a whole:

- 0-20: Poor
- 21-40: Below average
- 41-60: Average
- 61-80: Good
- 81-100: Excellent

In this way, the index provides an overall assessment of the tourist destination, helping to identify strengths and areas for improvement related to social and cultural aspects that can influence the visitor experience and the sustainability of the local community.

# OVERTOURISM PILLAR INDEX

## What is the Overtourism Pillar Index?

The Overtourism Pillar Index is an evaluation tool to measure the impact of excessive or poorly managed tourist flows in a tourist destination. To do so, it divides its assessment into three main sub-indices: Tourism Pressure Index, Tourism Supply Index, OTA Intermediary Index.

The indicators used to calculate these sub-indices are based on various data, including the sentiment of local communities, analysis of digital visitor traces, points of interest (POI) in the area, and the local population density. These data are combined and weighted to provide a comprehensive picture of the impact of tourism on the destination.

The index values are divided into five ranges:

- **0-20 = Poor:** Indicates a situation where tourism has a significant negative impact on the destination and local communities.
- **21-40 = Below Average:** Suggests that there are issues related to overtourism, but the situation could be managed more effectively.
- **41-60 = Average:** Indicates a balance between tourist flows and local management capacity.
- **61-80 = Good:** Suggests that the destination is managing tourist flows well and can maximise the benefits of tourism.
- **81-100 = Excellent:** Indicates a situation where tourism is well-managed, positively impacts the destination and local communities, and offers a high-quality tourism experience.

In summary, the Overtourism Pillar Index provides a comprehensive tool for assessing the impact of tourism on a destination, considering various critical aspects related to tourist flows and tourism supply to help monitor and improve tourism management in a given area.

# DESTINATION MANAGEMENT PILLAR INDEX

## What is the Destination Management Pillar Index

The Destination Management Pillar is an evaluation framework that focuses on the management and perception of a tourist destination by its visitors. It consists of three sub-indices: the Sentiment Index, the Travel Barometer Index, and the Seasonal Balance Index. The primary goal of this pillar is to assess the overall satisfaction of visitors based on their experience at various points of interest within the tourist destination. To do so, it divides its assessment into three main sub-indices: Sentiment Index, Travel Barometer Index, Seasonal Balance Index.

The scale of index values provides a precise classification of the tourist destination's performance:

- **0-20:** Poor
- **21-40:** Below average
- **41-60:** Average
- **61-80:** Good
- **81-100:** Excellent

In summary, the Destination Management Pillar assesses visitor perception, their trust in the destination, and seasonal balance, providing a comprehensive picture of visitor management and satisfaction in a tourist destination.

# ENVIRONMENTAL PILLAR INDEX

## What is the Environmental Pillar Index?

The Environmental Pillar is one of the fundamental cornerstones for assessing the sustainability of a destination or a specific geographic area. This pillar comprises three key sub-indices: the Nature Coverage Index, the Air Quality Index, and the Overall Environmental Index. Each sub-index reflects specific aspects of the environment and contributes to providing a comprehensive overview of the impact of human activities on the ecosystem. To do so, it divides its assessment into three main sub-indices: Nature Coverage Index, and Air Quality Index.

The Overall Environmental Index synthesises the two sub-indices, considering natural coverage and air quality. This index reflects the combined effect of human activities on the environment and is evaluated on a scale of values ranging from 0 to 100. Below are descriptions of the levels on the scale:

- **0-20: Poor** - The area significantly impacts the ecosystem and poor air quality.
- **21-40: Below Average** - The environment is improving, but further efforts are needed to ensure sustainability.
- **41-60: Average** - The area balances nature conservation and air quality well.
- **61-80: Good** - The environment is well-preserved, and air quality is satisfactory.
- **81-100: Excellent** - The area exhibits excellent nature conservation and exceptional air quality, representing a model of environmental sustainability.

In summary, the Environmental Pillar assesses the impact of human activities on the environment, including nature conservation and air quality, through a scale of values that clearly indicates the sustainability of the area under consideration. A higher score indicates greater environmental sustainability.



**THANK YOU**

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