



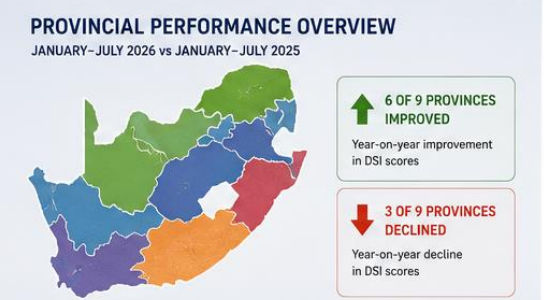
SOUTH AFRICAN TOURISM

Destination Sustainability Index

National and Provincial Destination Sustainability Index

Insights Unit

July – Sep. 2026 | Q2



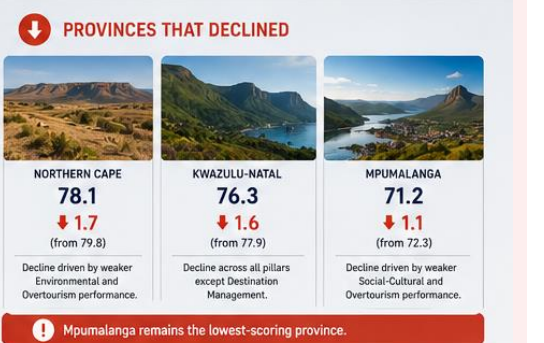
KEY TAKEAWAYS

- South Africa maintains a strong and resilient sustainability position.
- Broad-based improvements across key pillars and most provinces.
- Overtourism pressures and declines in three provinces highlight emerging risks that need close monitoring.



THE PATH FORWARD

- DESTINATION MANAGEMENT**
Strengthen planning, governance and stewardship.
- RESPONSIBLE TOURISM GROWTH**
Balance growth with destination capacity and community well-being.
- MANAGE SUPPLY PRESSURES**
Address tourism supply pressures to protect resources and experiences.
- LONG-TERM SUSTAINABILITY**
Drive environmental, social and economic sustainability for future generations.



Executive Summary

South Africa's Destination Sustainability Index (DSI) remained stable at 82.5/100 for January–July 2026, unchanged from the corresponding period in 2025. The stable national score reflects continued resilience in destination sustainability, although performance varied across the underlying pillars. Improvements in the Environmental, Social-Cultural and Destination Management pillars were offset by a decline in Overtourism, signalling growing tourism-related pressures that will require continued attention to ensure balanced and sustainable tourism growth.

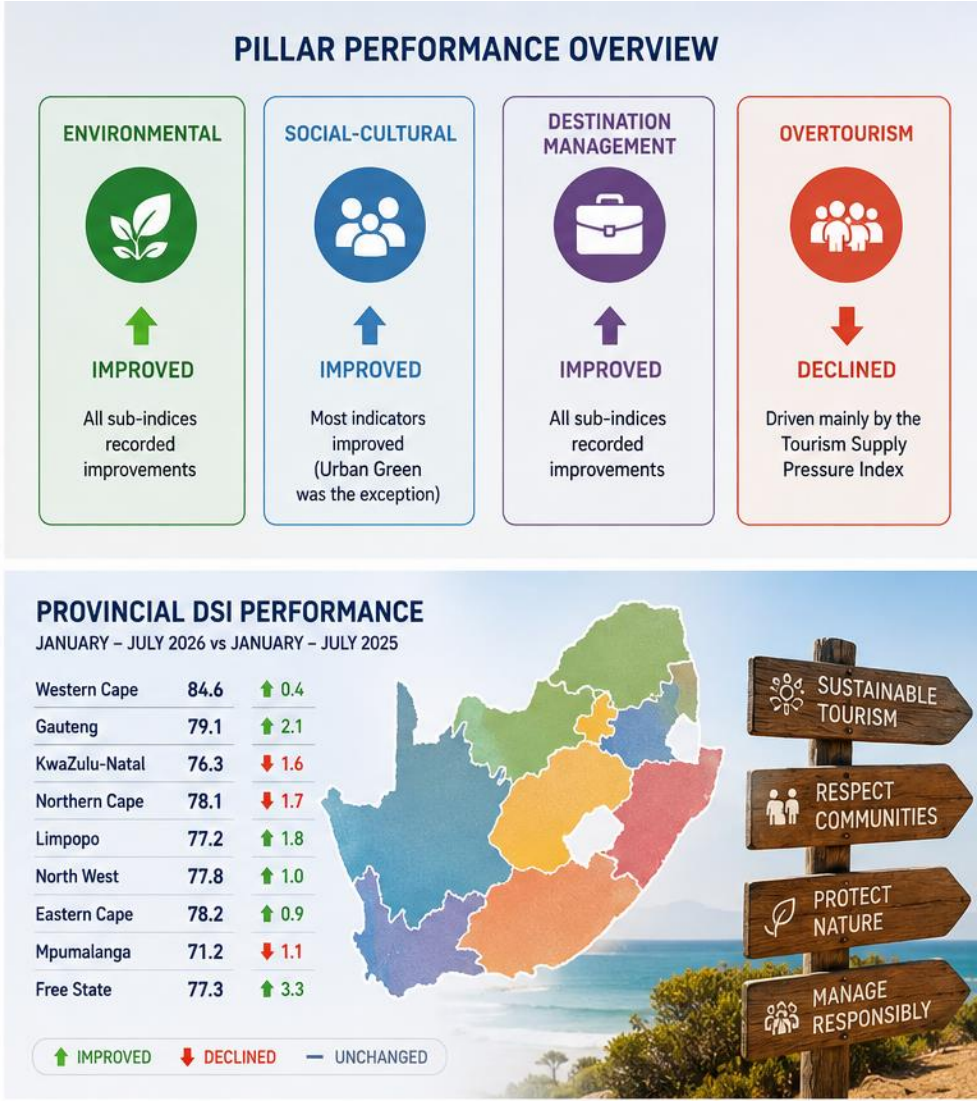
Progress was broad-based across the Environmental and Destination Management pillars, with all sub-indices recording improvements. Most Social-Cultural indicators also strengthened, with Urban Green being the exception. Conversely, the deterioration in the Overtourism pillar was primarily driven by the Tourism Supply Pressure Index, highlighting increasing supply-side pressures and the importance of effectively managing tourism growth, destination capacity and resources to safeguard South Africa's long-term sustainability and competitiveness.

At provincial level, performance was mixed, with six of the nine provinces recording year-on-year improvements. The Western Cape remained the strongest-performing province, increasing from 84.2 to 84.6, supported by improvements in Social-Cultural and Destination Management performance. The Free State recorded the largest improvement, rising by 3.3 points from 74.0 to 77.3, followed by Gauteng, which improved by 2.1 points to 79.1, and Limpopo, which increased by 1.8 points to 77.2. The North West and Eastern Cape also recorded gains, reaching 77.8 and 78.2, respectively. These improvements were generally underpinned by stronger Environmental, Social-Cultural and Destination Management performance.

Executive Summary

In contrast, the Northern Cape, KwaZulu-Natal and Mpumalanga recorded declines. The Northern Cape decreased by 1.7 points to 78.1, largely due to weaker Environmental and Overtourism performance, while KwaZulu-Natal declined by 1.6 points to 76.3, with deterioration across all pillars except Destination Management. Mpumalanga declined by 1.1 points to 71.2, remaining the lowest-scoring province, with weaker Social-Cultural and Overtourism performance contributing to the decrease.

Overall, the January–July 2026 results indicate that South Africa continues to maintain a relatively strong and resilient sustainability position, supported by improvements across several key pillars and most provinces. However, the deterioration in Overtourism indicators, together with declining performance in three provinces, highlights emerging pressures that warrant close monitoring. Sustaining progress will require continued emphasis on destination management, responsible tourism growth and the management of tourism supply pressures to ensure that increased tourism activity translates into long-term environmental, social and economic sustainability.



Continued progress across key pillars and provinces demonstrates resilience. Managing overtourism and tourism supply pressures will be critical to ensuring long-term sustainability and competitiveness.

ENVIRONMENTAL

SOCIAL-CULTURAL

DESTINATION MANAGEMENT

OVERTOURISM

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 – July 2026, analyse key trends and pressure areas across sustainability pillars, and 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 remained stable at 82.5/100 for January–July 2026, unchanged from the same period in 2025. While the overall score remained steady, performance across the sustainability pillars varied, with improvements in the Environmental, Social-Cultural and Destination Management pillars offset by a decline in Overtourism. Overall, the results reflect continued resilience in South Africa’s destination sustainability performance, alongside emerging pressures that may require ongoing attention to support balanced and sustainable tourism growth.



Destination Sustainability Index	82.5 /100 82.5/100
Social-Cultural Pillar	74.1 /100 72.9/100
Destination Management Pillar	93.3 /100 92.5/100
Overtourism Pillar	77.5 /100 80.3/100
Environmental Pillar	85.1 /100 84.2/100

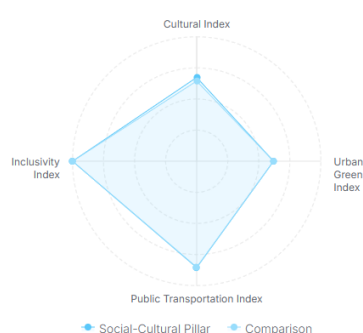
NB: A higher overtourism score indicates a situation where tourism is well-managed, positively impacts the destination and local communities, and offers a high-quality tourism experience.

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

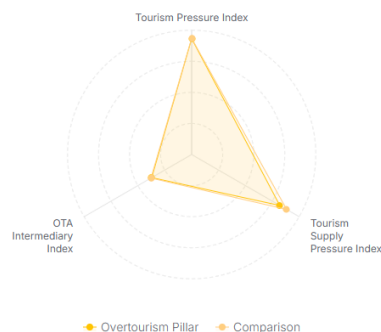
All sub-indices within the **Environmental** and **Destination Management** pillars recorded improvements, while gains were also evident across most **Social-Cultural** indicators, with **Urban Green** being the exception. This points to broad-based progress across key dimensions of destination sustainability. However, the **Overtourism** pillar declined, reflecting increased tourism-related pressures and highlighting the need to balance tourism growth with the sustainable management of destinations and resources. The **Tourism Supply Pressure Index** was the largest contributor to this decline, suggesting that supply-side pressures remain an important consideration in maintaining the long-term sustainability and competitiveness of South Africa as a tourism destination.



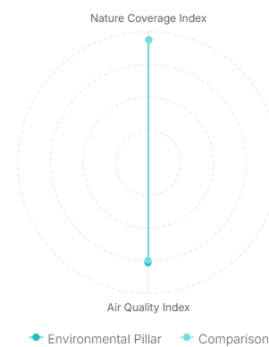
Social-Cultural Pillar	▲ 74.1 _{/100} 72.9 _{/100}
Cultural Index	▲ 67.4 _{/100} 64.5 _{/100}
Urban Green Index	▼ 61.9 _{/100} 61.9 _{/100}
Public Transportation Index	▲ 85.6 _{/100} 85.2 _{/100}
Inclusivity Index	▬ 100 _{/100} 100 _{/100}



Destination Management Pillar	▲ 93.3 _{/100} 92.5 _{/100}
Sentiment Index	▲ 88.8 _{/100} 88.7 _{/100}
Travel barometer Index	▲ 97.2 _{/100} 97.2 _{/100}
Seasonal Balance Index	▲ 92.4 _{/100} 87.3 _{/100}



Overtourism Pillar	▼ 77.5 _{/100} 80.3 _{/100}
Tourism Pressure Index	▼ 93.2 _{/100} 93.5 _{/100}
Tourism Supply Pressure Index	▼ 82.0 _{/100} 88.4 _{/100}
OTA Intermediary Index	▼ 37.1 _{/100} 37.9 _{/100}



Environmental Pillar	▲ 85.1 _{/100} 84.2 _{/100}
Nature Coverage Index	▬ 93.7 _{/100} 93.7 _{/100}
Air Quality Index	▲ 76.5 _{/100} 74.7 _{/100}

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

Source: Data Appeal – Destination AI

Provincial Index

Provincial DSI

Western Cape

The Western Cape’s DSI for 2026 (January – July) is **84.6/100**, up from **84.2/100** during the same period in 2025. This improvement is largely driven by stronger performance in the **Social Cultural** and **Destination management** pillars.

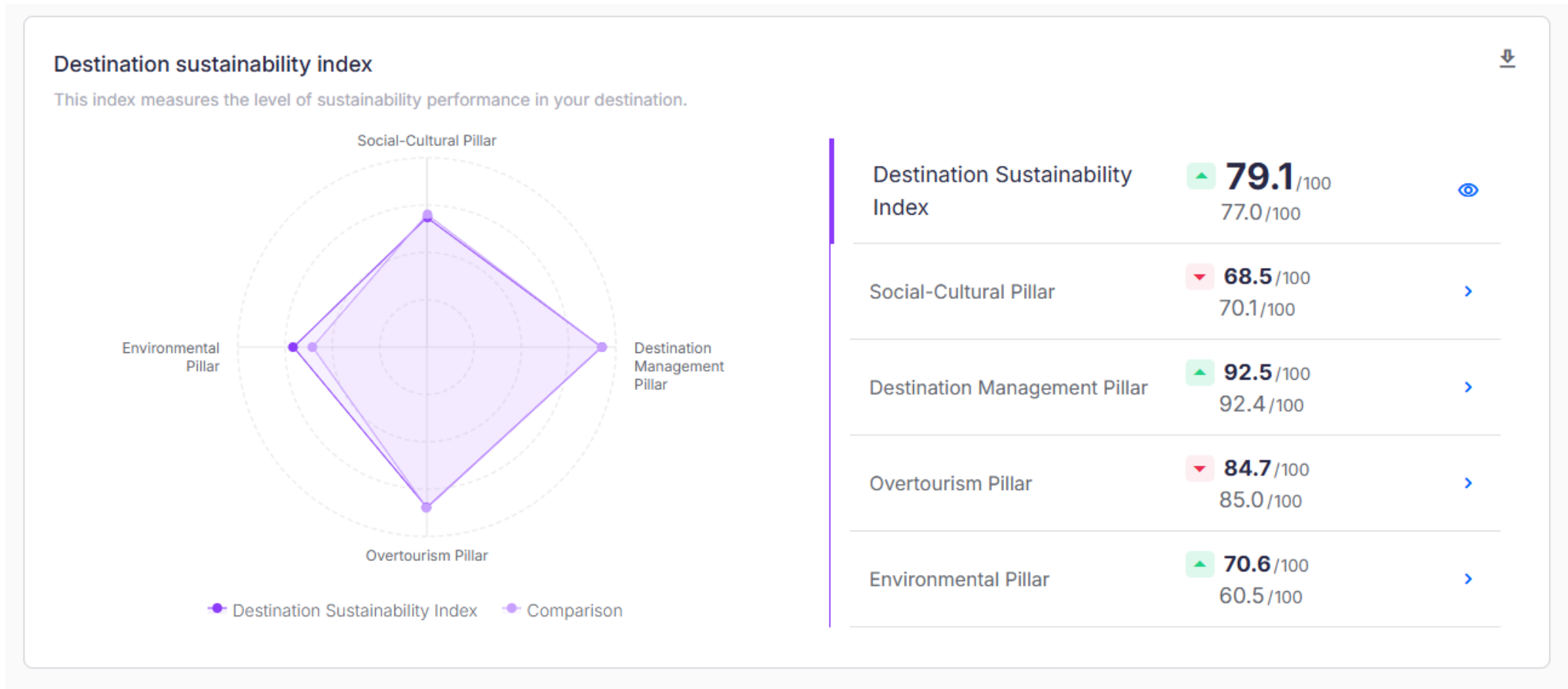


Destination Sustainability Index	84.6/100 84.2/100
Social-Cultural Pillar	79.5/100 75.9/100
Destination Management Pillar	93.2/100 89.9/100
Overtourism Pillar	77.0/100 81.9/100
Environmental Pillar	88.4/100 89.0/100

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 (January – July) is **79.1/100**, up from **77.0/100** during the same period in 2025. This improvement is largely driven by strong performance in the **Environmental** and **Destination Management** pillars.



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 (January – July) is **76.3/100**, down from **77.9/100** during the same period in 2025. This decline is largely driven by a decline in performance of all the pillars with the exception of Destination Management Pillar.



Destination Sustainability Index	76.3/100 77.9/100
Social-Cultural Pillar	65.5/100 66.1/100
Destination Management Pillar	92.2/100 91.8/100
Overtourism Pillar	71.2/100 74.7/100
Environmental Pillar	76.6/100 79.0/100

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 (January – July) is **78.1/100**, down from **79.8/100** during the same period in 2025. This decline is largely driven by declining performance in the **Overtourism** and **Environmental** pillars.



Destination Sustainability Index	78.1/100 79.8/100
Social-Cultural Pillar	56.7/100 55.5/100
Destination Management Pillar	90.3/100 88.6/100
Overtourism Pillar	74.3/100 83.8/100
Environmental Pillar	91.1/100 91.2/100

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

Limpopo

Limpopo's DSI for 2026 (January – July) is **77.2/100**, up from **75.4/100** during the same period in 2025. This improvement is largely driven by a strong performance in the **Social-Cultural, Environmental** and **Destination Management** pillars.



Destination Sustainability Index **77.2**/100
75.4/100

Social-Cultural Pillar **49.8**/100
44.8/100

Destination Management Pillar **92.4**/100
92.1/100

Overtourism Pillar **82.0**/100
82.8/100

Environmental Pillar **84.7**/100
82.0/100

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 (January – July) is **77.8/100**, up from **76.8/100** during the same period in 2025. This improvement is largely driven by strong in performance in the **Social Cultural, Destination Management, and Environmental** pillar.



Destination Sustainability Index	77.8/100 76.8/100
Social-Cultural Pillar	56.8/100 52.4/100
Destination Management Pillar	92.0/100 91.5/100
Overtourism Pillar	78.0/100 80.0/100
Environmental Pillar	84.5/100 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

Eastern Cape

The Eastern Cape’s DSI for 2026 (January – July) is **78.2/100**, up from **77.3/100** during the same period in 2025. This improvement is largely driven by strong performance in the **Environmental**, **Destination management** and **Social-Cultural** pillars.



Destination Sustainability Index	▲ 78.2/100 77.3/100
Social-Cultural Pillar	▲ 57.4/100 53.1/100
Destination Management Pillar	▲ 91.7/100 89.8/100
Overtourism Pillar	▼ 79.2/100 81.9/100
Environmental Pillar	▲ 84.7/100 84.4/100

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 (January – July) is **71.2/100**, down from **72.3/100** during the same period in 2025. This performance is largely driven by declining performance in the **Social-Cultural**, and **Overtourism** pillars.



Destination Sustainability Index **71.2**/100
72.3/100

Social-Cultural Pillar **54.8**/100
59.4/100

Destination Management Pillar **91.4**/100
91.3/100

Overtourism Pillar **63.3**/100
66.1/100

Environmental Pillar **75.5**/100
72.6/100

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 (January – July) is **77.3/100**, up from **74.0/100** during the same period in 2025. This improvement is largely driven by strong performance **Social-Cultural, Destination Management, and Environmental** pillars.



Destination Sustainability Index **77.3**/100
74.0/100

Social-Cultural Pillar **58.3**/100
51.6/100

Destination Management Pillar **91.9**/100
89.9/100

Overtourism Pillar **78.0**/100
78.7/100

Environmental Pillar **81.3**/100
75.7/100

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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