Tourism Market Insights: What Has Changed Since Last Year?

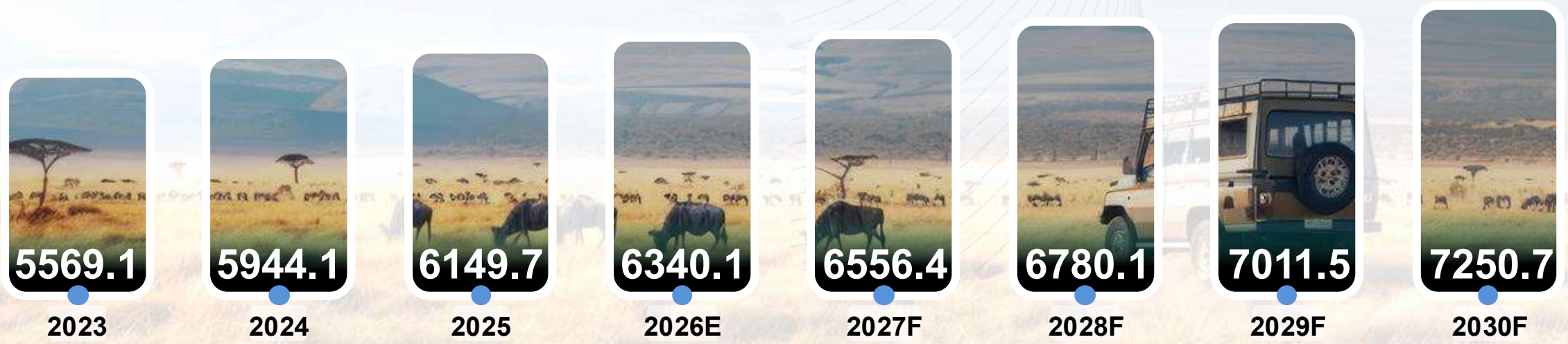
GLOBAL LEISURE TRAVEL

GROWTH CONTINUES, BUT MARKET IS EVOLVING

Global leisure travel spending continues to grow, while evolving traveller expectations are reshaping how destinations compete for demand

GLOBAL LEISURE TRAVEL SPENDING

2023-2030F ($ Bn)



+3.5%

2024–2025 YoY growth

+14.4%

Cumulative forecast growth 2026–2030

GLOBAL LEISURE TRAVEL

PREFERENCES ARE SHIFTING:
FROM TRADITIONAL HOLIDAYS TO MORE PERSONAL EXPERIENCES

Travellers are prioritising wellbeing, immersive experiences and more flexible, conscious choices about where and when they holiday

REST AND RECONNECTION

Travellers seek relaxation, nature and experiences that support wellbeing

56% seek rest and recharge

44% plan wellness or mindfulness activities

MORE DIVERSE TRAVEL PATTERNS

Solo, multigenerational, and skip-generation trips cater to different needs for connection and independence

26% plan solo trips

29% opt for skip-generation trips

EXPERIENCES BEYOND SIGHTSEEING

Food, culture, concerts and sporting events give travellers more participatory ways to experience destinations

54% plan concerts/festivals

89% say local F&B deepens cultural understanding

41% plan sporting events

MORE DELIBERATE TRAVEL CHOICES

Crowd avoidance, off-peak travel and sustainability are influencing destination and timing decisions

42% plan off-peak holidays

34% seek quieter destinations

85% want sustainable travel

GLOBAL LEISURE TRAVEL

AI IS EXTENDING ITS ROLE ACROSS THE TRAVEL JOURNEY

Travellers are using AI to discover destinations, plan trips, support booking decisions and navigate experiences in-destination

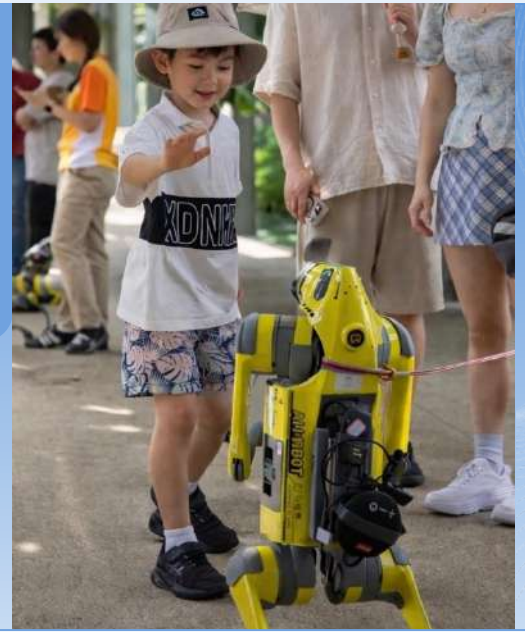
Travel Journey Stage	01 PLANNING	02 BOOKING	03 IN-DESTINATION
AI Uptake	**50%** travellers leveraged AI for travel planning	**32%** find AI helpful for booking	**61%** have used AI while on a trip
Use Cases	Discover Destinations **(40%)** Research the best time to visit **(38%)** Find local experiences/cultural activities **(37%)** Restaurant recommendations **(36%)** Compare hotels **(40%)**, flights **(27%)** and ground-transport options **(22%)**	Re-confirm prices Make reservations for flights, hotels **(30%)** and activities	Translation capabilities **(45%)** In-destination activity suggestions **(44%)** Restaurant recommendations **(40%)** Navigating unfamiliar locations or transport systems **(40%)**

GLOBAL LEISURE TRAVEL

DESTINATIONS ARE BRINGING AI INTO THE VISITOR JOURNEY

Destinations are applying AI to deliver personalised trip planning, multilingual assistance and more interactive, real-time visitor experiences

SINGAPORE



Bringing Destination Stories to Life with AI

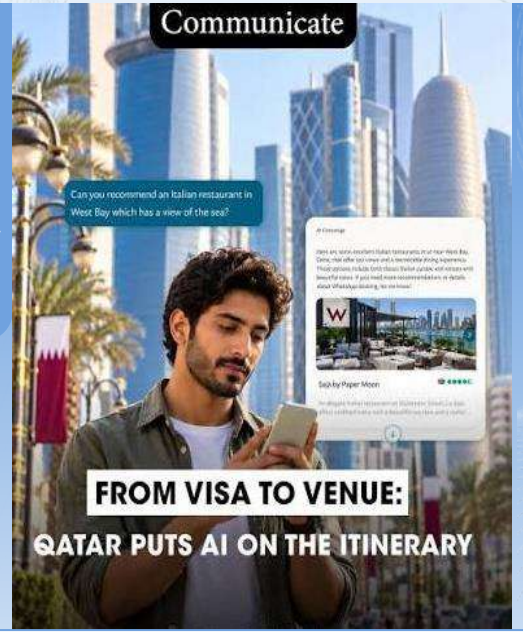
Singapore is introducing AI-powered, multilingual robotic guides at selected attractions, combining local storytelling with real-time visitor assistance. The initiative makes exploring attractions more interactive and helps visitors access local stories across language barriers

ROME

A Virtual Assistant for Exploring the City

Rome's JULIA virtual assistant gives visitors conversational access to destination information, practical guidance and personalised recommendations across digital channels, helping them discover relevant experiences and navigate the city more easily

QATAR



Turning Travel Inspiration into Personalised Itineraries

Visit Qatar's GenAI Trip Concierge helps travellers build and adapt itineraries around their interests, dates and preferences. It combines conversational assistance with destination information to turn initial travel inspiration into a more actionable trip plan

GLOBAL LEISURE TRAVEL

PERSONALISING SOUTH AFRICA'S TRAVEL JOURNEY WITH AI

Siyanda helps travellers from the US and Canada discover South African experiences and build personalised itineraries, while equipping travel advisors with on-demand destination insights

Personalised Trip Planning

Builds tailored itineraries around travellers' interests, budgets and travel preferences

Destination Discovery

Recommends experiences across wildlife, hiking, food, wine, heritage and local culture

Always-on Travel Trade Support

Gives travel advisors 24/7 access to destination information and tailored itinerary suggestions

SOURCE MARKET SHIFTS

SOURCE MARKETS SHOW DIVERGENT MOMENTUM

Brazil, Russia and Malawi lead on growth across arrivals and spending; Japan and Nigeria show emerging promise, Mozambique presents value opportunity, while China and India have softened

Gaining Markets

Positive arrivals and spending growth

Brazil

Arrivals (2025): **63.8k** | **+28% YoY**

Spend (2025): **R1.46bn** | **+39% YoY**

Russia

Arrivals (2025): **41.7k** | **+36% YoY**

Spend (2025): **R1.26bn** | **+61% YoY**

Malawi

Arrivals (2025): **230.6k** | **+41% YoY**

Spend (2025): **R4.78bn** | **+41% YoY**

Emerging Opportunities

Promising growth; smaller base/less established performance

Japan

Arrivals (2025): **19.9k** | **+15% YoY**

Spend (2025): **R382mn** | **+41% YoY**

Nigeria

Arrivals (2025): **29.3k** | **+30% YoY**

Spend (2025): **R619mn** | **+38% YoY**

Value Opportunities

Arrivals growing faster than spending

Mozambique

Arrivals (2025): **2.08m** | **+31% YoY**

Spend (2025): **R5.62bn** | **+3% YoY**

Slowing Markets

Recent weakness in arrivals and spending

China, including Hong Kong

Arrivals (2025): **38.1k** | **−9% YoY**

Spend (2025): **R887mn** | **−9% YoY**

India

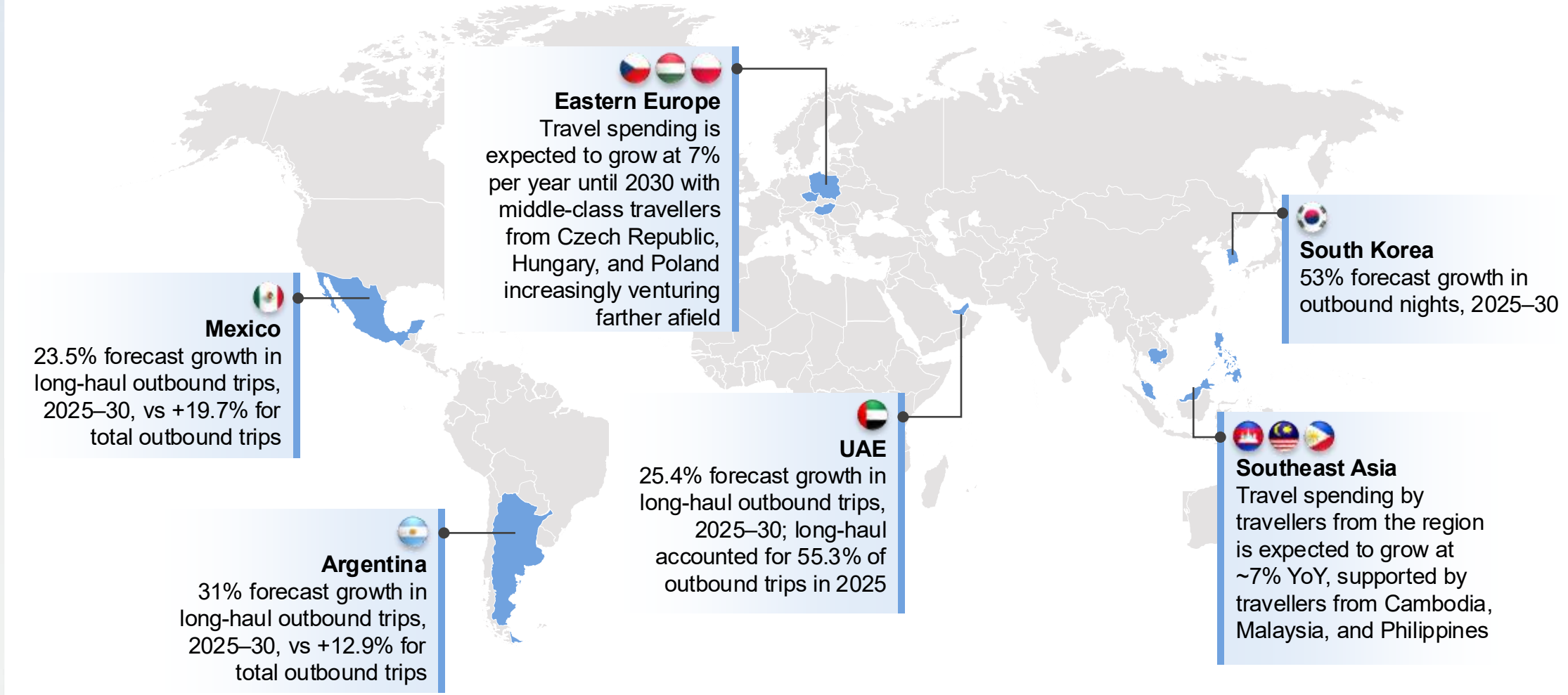
Arrivals (2025): **69.7k** | **−8% YoY**

Spend (2025): **R1.26bn** | **−3% YoY**

SOURCE MARKET SHIFTS

UNLOCKING THE NEXT WAVE OF SOURCE-MARKET GROWTH

Emerging source markets show promising outbound travel growth, with strong long-haul potential in select markets and broader growth opportunities across Eastern Europe and Southeast Asia



EMERGING OPPORTUNITIES

FIVE SHIFTS THAT COULD REDEFINE LEISURE TRAVEL

As traveller expectations evolve, new opportunities are emerging across luxury, specialist experiences, travel behaviour, destination discovery and after-dark tourism

Luxury Moves Beyond Opulence

Luxury is increasingly defined by personalisation, exclusivity and memorable experiences, rather than accommodation alone

48% affluent and HNWIs prefer luxury experiences over goods in 2026, while **41%** plan to increase travel spending into 2027

Passions Become the Reason to Travel

From wildlife and food to adventure and local culture, travellers are increasingly choosing trips around the experiences they want to pursue

68% are likely to take hobby- or interest-focused trips in 2027, while **51%** plan trips around a single defining experience

Depth takes Priority over Breadth

Experienced travellers increasingly favour a slower pace, deeper local connections and fewer, more memorable experiences

33% prefer to spend more time in fewer destinations for deeper exploration

The Search Extends Beyond Familiar Destinations

Travellers are looking beyond established hotspots for distinctive, less-crowded places and experiences

29% are interested in alternative destinations offering a similar experience to well-known hotspots

The Visitor Experience Extends Beyond Daylight

Stargazing, night safaris and after-dark cultural experiences create new reasons to visit and expand the hours in which destinations can be explored

62% are considering visiting darker-sky destinations with limited light pollution, with interest in stargazing, guided astronomy and celestial events

South African National Convention Bureau

SANCB

BID SUPPRT PROGRAMME

JANUARY – JUNE 2026

16 bids already secured, worth R97.7m and 4 630 delegates, across Cape Town, Durban, Johannesburg, Bloemfontein, Stellenbosch, Mogale City, Muldersdrift and Thohoyandou

57

Bids supported for events to be hosted 2026–2032

R687m

Potential economic impact from these events

28 475

Estimated delegates (international and regional)

The conversion: confirmed for South Africa

16	R97.7m	4 630	8
bids won	economic impact	Delegates expected	Host destinations in SA

Submissions are driven by business process outsourcing (BPO), life sciences, medical sciences, and education, highlighting priority growth industries and strengthening alignment with national development goals.

Source: SANCB Bidding Assessment Report, January to June 2026. Economic figures are estimates.

SANCB

NATIONAL ASSOCIATION PROJECT

VILLAGES, TOWNSHIPS & SMALL DORPIES (SINCE 21/22)

All nine provinces, 31 destinations, events growing from 3 in the 2021/22 launch year to 16 in 2025/26. 11 destinations have hosted more than once, across sectors from public health to agriculture.

Events are spreading beyond the big cities: 9 of 9 Provinces reached

R80.4m estimated impact from **R10.0m** SANCB support

43	31	7,995	138
supported events hosted	VTSD destinations	Delegates attracted	Event days

FINANCIAL YEAR	EVENTS	DELEGATES	EVENT DAYS	EST. ECONOMIC IMPACT	SANCB SUPPORT
2021/22	3	233	12	R3.37m	R0.60m
2022/23	5	771	18	R9.99m	R0.95m
2023/24	5	1 211	12	R8.30m	R1.80m
2024/25	9	1 457	34	R13.27m	R2.16m
2025/26	16	3 891	50	R42.06m	R3.63m
2026/27 Q1	5	432	12	R3.42m	R0.90m

Source: SANCB Bidding Assessment Report, January to June 2026.

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