



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



INVEST IN
TOURISM INFRASTRUCTURE
SOUTH AFRICA
INVEST IN GROWTH





CREDITS

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EXECUTIVE SUMMARY

South Africa's tourism sector presents a compelling infrastructure investment opportunity, underpinned by growing visitor demand, a diverse tourism offering, expanding connectivity and significant potential for new and upgraded tourism infrastructure across the country.

The Department of Tourism's continuous effort to mobilise investments is through the South African Tourism Investment Summit (SATIS) and other platforms. These platforms bring together government, infrastructure investors, financiers, developers, tourism businesses and industry partners around a shared objective: i) to unlock tourism infrastructure investment that expands the visitor economy, ii) to strengthen destinations and create sustainable economic opportunities.

Tourism infrastructure is fundamental to growth. Accommodation, attractions, resorts, conference facilities, transport connections, visitor amenities, digital infrastructure and supporting destination infrastructure all shape the quality, capacity and competitiveness of a tourism destination.

As this infrastructure develops and grows, the benefits extend far beyond the individual asset to the broader destination.

Tourism infrastructure investment stimulates construction and procurement, supports local suppliers, creates jobs for

locals, enables the formalisation of new tourism businesses and generates opportunities across sectors including transport, food and beverage, retail, technology, agriculture, entertainment, culture and conservation.

SOUTH AFRICA HAS STRONG FOUNDATIONS TO BUILD ON.

The country offers exceptional tourism diversity within a single destination - from globally renowned wildlife and conservation experiences to more than 2,500 kilometres of coastline; from vibrant cities and business events to food and wine, heritage, culture, adventure, wellness, rural and township experiences.

This product diversity creates infrastructure investment opportunities across different tourism segments, geographic areas and visitor markets.

Demand is supported by a strong domestic tourism market, regional African travel and a growing international visitor base. Expanding air connectivity and route development are creating further opportunities to strengthen established tourism nodes while opening new destinations to visitors.

At the same time, considerable infrastructure potential remains untapped. There is scope to develop new accommodation and attractions,

upgrade existing tourism assets, strengthen destination infrastructure and expand quality tourism products beyond the country's traditional tourism hubs.

This creates an opportunity to invest not only in the South Africa visitors know today, but in the destinations and experiences that will define its tourism economy tomorrow.

South Africa also offers an established enabling environment for infrastructure investment. The country combines a sophisticated, world-class financial system with a sound regulatory environment and established mechanisms that support investment security. Government and industry are working together to improve project readiness, strengthen the pipeline of commercially viable tourism infrastructure projects, and help move opportunities from concept to implementation.

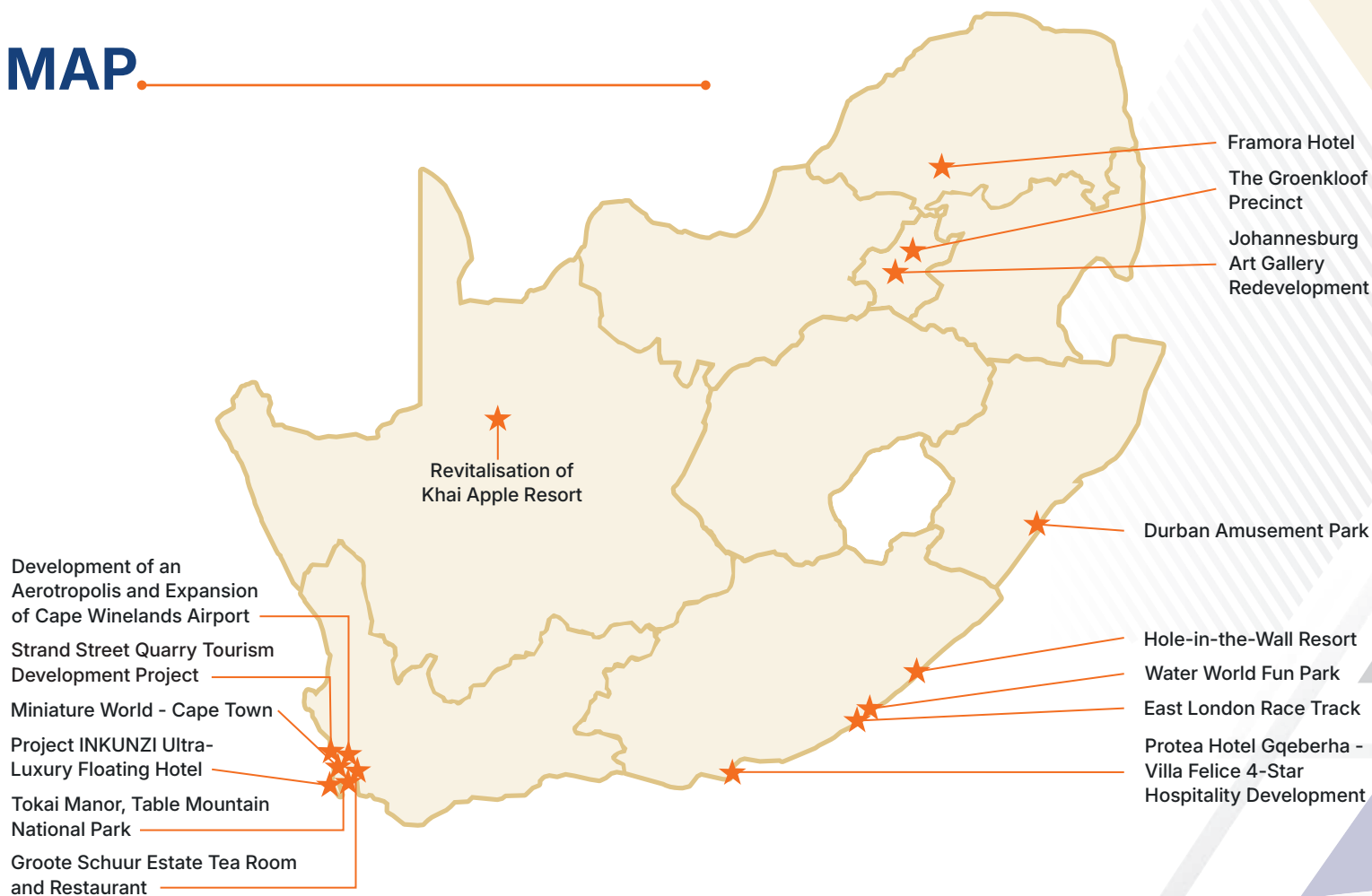
Transformation is integral to this infrastructure growth agenda. New tourism infrastructure should broaden economic participation, support emerging enterprises, create opportunities for women and the youth, strengthen local supply chains, and ensure communities share in the economic value generated by tourism.

Tourism investment platforms therefore turn tourism potential into investable infrastructure, and infrastructure into sustainable economic growth.

- South Africa has strong demand.
- South Africa boasts diverse destinations.
- South Africa has the infrastructure opportunity.
- And South Africa is ready to build the next chapter of its tourism economy.



MAP



10 REASONS TO INVEST IN SOUTH AFRICA'S TOURISM SECTOR

Proven demand. Extraordinary experiences. Room to grow. South Africa offers investors a tourism economy with scale, diversity and momentum - combining world-class visitor experiences with growing demand, strong infrastructure, investment opportunity and the unmistakable warmth of South African hospitality. *Invest in tourism infrastructure. Invest in Growth.*

1

TOURISM IS ECONOMIC POWER

This is a growth sector.



Tourism contributed 4.9% to South Africa's GDP in 2024 and sustained approximately 954,000 direct jobs. Every new tourism investment can activate a wider value chain - from accommodation and transport to food, retail, experiences, technology, and local enterprise.

2

GROWTH YOU CAN SEE

Demand is rising - and breaking records.



South Africa welcomed a record 10.48 million international visitors in 2025. By July 2026, international arrivals had reached 6.58 million - up 12.4% year-on-year. The market is growing. The opportunity is growing with it.

3

A MARKET WITH DEPTH

Strong at home. Connected to Africa. Attractive to the world.



Domestic tourism is the bedrock of the sector, generating R111.6 billion in spend in 2025, while African markets continue to drive strong regional demand. Africa accounts for 76% of South Africa's international arrivals, while long-haul demand from the United States, the United Kingdom, and Germany adds further depth to the market. This mix helps spread demand across source regions and visitor segments. For investors, this means a visitor economy supported by domestic, regional and international markets. Multiple markets. Multiple segments.

4

A YEAR-ROUND DESTINATION

Sunshine. Coastlines. Cities. Mountains. Safari.



With diverse climatic regions, nearly 3,000 kilometres of coastline and outdoor experiences across all nine provinces, South Africa offers reasons to travel throughout the year. Year-round appeal supports year-round opportunity. More seasons. More experiences. More opportunity.

5

HOSPITALITY PEOPLE REMEMBER

Our people make your tourism experience unforgettable.



International visitor sentiment is strong, with travellers consistently praising South Africa's hospitality, service, food, attractions and atmosphere. Our spirit of Ubuntu - warmth, welcome, and human connection - helps turn first-time visitors into returning guests and global advocates.

6

ONE COUNTRY. ENDLESS EXPERIENCES.



Few destinations offer this much variety in one place.

Wildlife. Beaches. Culture. Heritage. Food and wine. Adventure. Wellness. Business events. Cities. Rural and township experiences. The pipeline can also respond to growing interest in wellness, adventure and agritourism, expanding the range of investable

7

CONNECTED TO OPPORTUNITY

Access is expanding.



South Africa's international airports connect the country to key African and global markets, while continued route development is bringing new capacity and new source markets within reach. The wider transport platform includes 144 airports with paved runways and a road network of more than 747,000 kilometres. Together with an expanding flight network, this infrastructure provides a substantial base for connecting visitors to tourism regions across the country. In 2024/25 alone, regional air passenger traffic grew alongside continued international growth. More connections mean more customers.

8

ROOM TO DISCOVER. ROOM TO INVEST.



Beyond the icons lies the next frontier of tourism growth.

From the Wild Coast and the Karoo to the Drakensberg and South Africa's towns, villages and rural landscapes, underdeveloped destinations offer significant

scope for new accommodation, attractions and experiences. Established attractions can anchor new regional offerings, while wellness, adventure and agritourism can help convert underdeveloped assets into bookable experiences. This creates space for investors to enter emerging destinations and shape their next phase of growth. For early investors, untapped potential can become first-mover advantage.

9

PARTNERSHIP THAT UNLOCKS INVESTMENT



A strong enabling environment for investment.

South Africa combines a sophisticated, world-class financial system with a sound regulatory environment and established mechanisms that support investment security. Government and industry are working together to unlock tourism investment - building a stronger pipeline of commercially viable projects and helping turn opportunity into growth. Coordinated work on air access, visas, tourism safety, skills and infrastructure strengthens the operating environment. Project-preparation support can also help move tourism infrastructure opportunities towards commercial readiness. Strong systems. Sound regulation. Investment opportunity.

10



INVESTING FOR THE FUTURE

The next tourism opportunity is smarter, greener and more connected.

Energy and water efficiency, climate resilience, digital platforms, smart mobility and technology-enabled visitor experiences are reshaping the tourism economy. Digital booking, payments and destination data can expand market access for rural and township enterprises, while local procurement helps spread investment benefits. South Africa's young talent base - with 33% of the population aged 15–34 - offers strong potential for tourism skills, careers and enterprise development. The Green Tourism Incentive Programme supports energy- and water-efficiency improvements, while renewable-energy investment strengthens the country's clean-energy platform. South Africa offers investors the opportunity to pursue commercial growth alongside environmental and social impact. Invest in tourism infrastructure. Invest in Growth.

SOUTH AFRICA IS READY.

**The demand is growing.
The experiences are extraordinary.
The opportunities are waiting.**

***Invest in tourism infrastructure.
Invest in Growth.***



An aerial photograph of a deep, lush green valley. A river with a sandy, light-colored bend flows through the center. The valley is surrounded by steep, rocky cliffs and dense green vegetation. In the background, more mountain peaks are visible under a clear sky. A large, semi-transparent blue circle is overlaid on the left side of the image.

INVESTMENT READY PROJECTS

INVESTING IN PEOPLE,
PLACES AND POTENTIAL.

HOLE-IN-THE-WALL RESORT



LOCATION

Hole-in-the-Wall near Coffee Bay in King Sabatha Dalindyebo Local Municipality, Eastern Cape Province.



PROJECT DESCRIPTION

Development of the Hole-in-the-Wall destination including a 4-star, 100-room hotel, day visitor facilities, indoor dining, bar and boma areas, swimming pool, a 500-seater conference facility, restaurant, lounge, health spa and fitness centre.



PROJECT TYPE / DEVELOPMENT

Hole in the Wall (Hotel Development/Resort).



STATUS

Planning processes are complete, including a scoping document. The private development requires an investment partner. Significant progress has been made on the road linking Hole-in-the-Wall to Coffee Bay, Spatial Planning and Land Use Management Act (SPLUMA) approvals and bulk infrastructure commitments.



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HOLE-IN-THE-WALL RESORT



R315 MIL
(US \$17.8 million)

Total Investment



85

Permanent jobs



R141.5 MIL
(US \$7.9 million)

At 40% of the project cost



100 ROOMS

4-star hotel



100+

Temporary jobs



500 SEATS

Conference facility



WATER WORLD FUN PARK



LOCATION

East London, Buffalo City Metropolitan Municipality, Eastern Cape Province.



PROJECT DESCRIPTION

Refurbishment of existing structures and completion of the Water World Fun Park project, including restoration of incomplete works, infrastructure upgrades and improvements required to meet quality, safety and operational standards.



PROJECT TYPE / DEVELOPMENT

Water World (Water Theme Park).



STATUS

Masterplanning and Market Study developed.



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WATER WORLD FUN PARK



R194 MILLION

(US \$10.9 million)

Estimated total investment



20

Permanent jobs



R80 MILLION

(US \$4.5 million)

Funding gap



**PUBLIC PRIVATE
PARTNERSHIP**

Investment structure



100

Temporary jobs



TOKAI MANOR, TABLE MOUNTAIN NATIONAL PARK



LOCATION

Table Mountain, City of Cape Town, Western Cape Province.



PROJECT DESCRIPTION

A multi-use eco-tourism opportunity within the Tokai Manor Precinct of Table Mountain National Park. The site is designated for high- and low-intensity leisure and offers an operator the opportunity to operate and maintain eco-tourism facilities and related tourism activities.



PROJECT TYPE / DEVELOPMENT

Tokai (Precinct Development)



STATUS

Financial Feasibility Study completed. National Treasury. Public Private Partnership (PPP) approvals obtained.



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TOKAI MANOR, TABLE MOUNTAIN NATIONAL PARK



R69 MILLION
(US \$3.9 million)

Estimated total investment



120

Permanent jobs



150

Temporary jobs



**PUBLIC PRIVATE
PARTNERSHIP**

National Treasury approvals



ECO-TOURISM

Multi-use facility



GROOTE SCHUUR ESTATE TEA ROOM AND RESTAURANT



LOCATION

Northern Section of Table Mountain National Park, City of Cape Town, Western Cape Province.



PROJECT DESCRIPTION

A tourism and hospitality opportunity at the Groote Schuur Estate Tea Room and Restaurant, a mixed-use, high-intensity leisure node with cultural, historical and recreational value. The project includes new assets and upgrades to existing assets, with commercial rights covering a restaurant, function venue, curio retail shop and related tourism activities.



PROJECT TYPE / DEVELOPMENT

Not stated in supplied source



STATUS

Financial Feasibility Study completed. National Treasury. Public Private Partnership (PPP) approvals obtained.



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GROOTE SCHUUR ESTATE TEA ROOM AND RESTAURANT



R20 MILLION

(US \$1.1 million)

Total project cost



25

Permanent jobs



60

Temporary jobs



**PUBLIC PRIVATE
PARTNERSHIP**

National Treasury approvals



MIXED-USE

Tourism & hospitality



DEVELOPMENT OF AN AEROTROPOLIS AND EXPANSION OF CAPE WINELANDS AIRPORT



LOCATION

Durbanville, City of Cape Town Municipality, Western Cape Province.



PROJECT DESCRIPTION

Cape Winelands Airport is a multi-phase aerotropolis infrastructure development, including the construction of an international airport, retail outlets, hotel and conference facilities, all designed with tourists in mind. Allowing for seamless travel between departure and destination, Cape Winelands Airport will provide a consummate experience for passengers and bring more tourists to the Western Cape, thereby supporting the local tourism industry.



PROJECT TYPE / DEVELOPMENT

Greenfield: New Development



STATUS

All planning processes are complete, including the scoping document. Environmental Impact Assessment (EIA) approval, zoning, master plan, Concept of Operations, property/title deeds, and an Engineering, Procurement and Construction (EPC) Agreement signed with WBHO Construction.



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DEVELOPMENT OF AN AEROTROPOLIS AND EXPANSION OF CAPE WINELANDS AIRPORT



R8 BILLION

(US\$470 million)

Total project cost



58 000

Permanent jobs



R2 BILLION

(US\$117 million)

Investment required



36 MONTHS

Project duration



34 000+

Temporary jobs



19.13%

IRR



DURBAN AMUSEMENT PARK



LOCATION

Durban, City of eThekweni Metropolitan Municipality, KwaZulu-Natal Province.



PROJECT DESCRIPTION

A large-scale beachfront tourism and entertainment development on the historic former Durban Funworld site along Durban's Golden Mile. The project includes 13 internationally certified Zamperla amusement rides, indoor arcade and XR/VR entertainment, family attractions, retail and food and beverage outlets, event areas, public amenities and promenade integration.



PROJECT TYPE / DEVELOPMENT

Brownfield: Upgrade/Expansion



STATUS

Order-of-magnitude cost estimate completed. Financial model completed; co-funding interest confirmed from National Empowerment Fund (NEF) and Public Investment Corporation (PIC) alongside IDC. BDO South Africa appointed for Phase 1 market assessment and demand forecasting. 45-year lease with eThekweni Municipality.



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DURBAN AMUSEMENT PARK



R980 MILLION
(US\$60.5 million)

Total project cost



398

Permanent jobs



R90 MILLION
(US\$5.5 million)

Investment required



36 MONTHS

Project duration



446

Temporary jobs



7%

ROI in Year One



JOHANNESBURG ART GALLERY REDEVELOPMENT



LOCATION

Joubert Park, Johannesburg CBD, City of Johannesburg, Gauteng Province.



PROJECT DESCRIPTION

The project aims to modernise and revitalise the existing Johannesburg Art Gallery while preserving its architectural and historical significance, improving technological infrastructure and the visitor experience. Development is planned over four phases across 36 months.



PROJECT TYPE / DEVELOPMENT

Brownfield: Upgrade/Refurbishment



STATUS

- Phase 1 completed;
- Phase 2 in progress;
- Phases 3 and 4 not yet started.
- The City of Johannesburg has already invested R66 172 144 in planning, design, relocation/storage facilities and relocation services.



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JOHANNESBURG ART GALLERY REDEVELOPMENT



R338 MILLION

(US\$20.8 million)

Total project cost



216

Permanent jobs



TBC

Investment required



36 MONTHS

Project duration



120

Temporary jobs



50%

ROI over 4–5 years



KHAI APPLE RESORT



LOCATION

Kathu, Gamagara Local Municipality, John Taolo Gaetsewe District Municipality, Northern Cape Province.



PROJECT DESCRIPTION

A 40-year public-private partnership to transform a dormant municipal resort into a leading business and leisure destination. The development includes 20 luxury chalets and 36 secure, smart-metered camping and caravan bays with modern ablution facilities.



PROJECT TYPE / DEVELOPMENT

Brownfield: Upgrade/Expansion



STATUS

Concept developed. Feasibility Study Report developed. GM Project has secured a 40-year lease term from the local municipality.



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KHAI APPLE RESORT



R143.29 MIL
(US\$8.8 million)

Total project cost



45

Permanent jobs



R143.29 MIL
(US\$8.8 million)

Investment required



40 YEARS

Project duration



120

Temporary jobs



7.9%

Annual ROI



EAST LONDON RACE TRACK



LOCATION

Buffalo City Metropolitan Municipality, Eastern Cape Province, West Bank (-33.0493, 27.8704).



PROJECT DESCRIPTION

Redevelopment and modernisation of the historic East London Grand Prix Circuit into a world-class motorsport, events and entertainment destination, including upgrades to the race track and spectator, hospitality, pit, commercial and event facilities.



PROJECT TYPE / DEVELOPMENT

Not stated in supplied source



STATUS

Existing operational motorsport facility with municipal approval for long-term development; currently at the investment structuring and strategic investor mobilisation stage.



CONTACT

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EAST LONDON RACE TRACK



R180 MILLION

(US\$11.4 million)

Total project cost



80

Post-construction jobs



R180 MILLION

(US\$11.4 million)

Investment required



50+

Entrepreneurs annually



700

Construction jobs



10-15%

Targeted ROI







PROJECT PREPARATION LIST

UNLOCKING OPPORTUNITIES FOR A
THRIVING TOURISM ECONOMY.

STRAND STREET QUARRY TOURISM DEVELOPMENT PROJECT



LOCATION

City of Cape Town Metro Municipality, Western Cape Province.



PROJECT DESCRIPTION

Redevelopment of the Strand Street Quarry site into a tourist and cultural facility including sports facilities, a museum/memory centre, landscaped heritage spaces, markets and restaurant, and a potential People Mover linking the quarry to Signal Hill, Lion's Head and the Lower Cable Station.



PROJECT TYPE / DEVELOPMENT

Brownfield: Upgrade and Redevelopment



STATUS

Land use and rights secured and supporting infrastructure in place. Funding requirement covers feasibility studies, detailed design work and initial operational costs.



CONTACT

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STRAND STREET QUARRY TOURISM DEVELOPMENT PROJECT



R3.5 BILLION

(US\$218 504)

Funding requirement



SECURED

Land use & rights



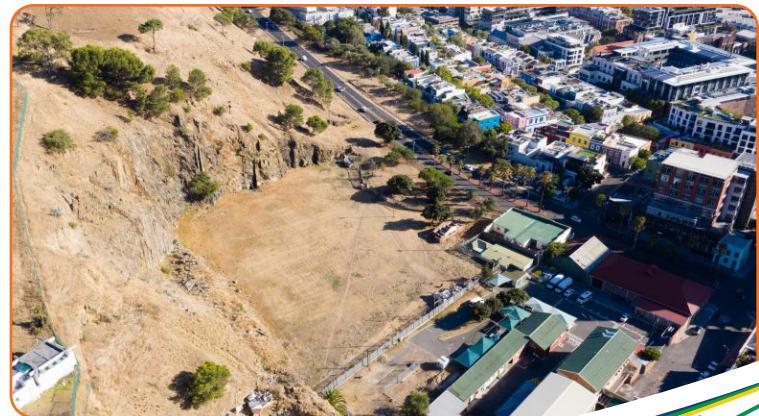
JOBS

Not yet quantified



2 YEARS

OPEX funding period



THE GROENKLOOF PRECINCT



LOCATION

Pretoria, City of Tshwane Metropolitan Municipality, Gauteng Province.



PROJECT DESCRIPTION

A precinct concept linking existing tourism assets and future development opportunities including accommodation, recreation and entertainment, picnic and braai areas, restaurants and shops, event and conference facilities, adventure train and historical trails.



PROJECT TYPE / DEVELOPMENT

Brownfield: Upgrade/Redevelopment



STATUS

Concept development stage.



CONTACT

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THE GROENKLOOF PRECINCT



R109 MILLION
(US\$6.8 million)

Total project cost / funding requirement



PUBLIC PRIVATE PARTNERSHIP

Investment structure



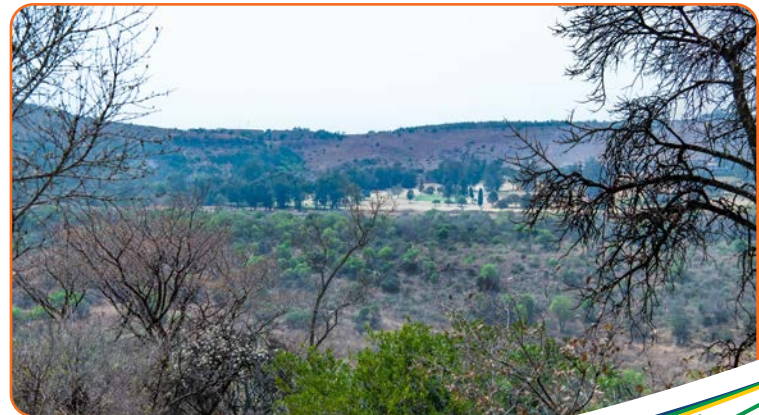
100-180

Direct jobs



CONCEPT

Development stage



MINIATURE WORLD – CAPE TOWN



LOCATION

Cape Town, City of Cape Town Municipality, Western Cape Province.



PROJECT DESCRIPTION

A proposed world-class indoor tourism attraction designed to become the largest miniature exhibition and immersive storytelling destination in Africa, showcasing Cape Town, the Winelands, South Africa, Africa and selected international destinations.



PROJECT TYPE / DEVELOPMENT

Greenfield



STATUS

Pre-feasibility stage. Site selection in progress. Seeking a strategic destination partner. 20-year track record operating four self-funded attractions.



CONTACT

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MINIATURE WORLD – CAPE TOWN



R80 MILLION
(US\$26.0 million)

Total project cost



12–24 MONTHS

Project duration



R25 MILLION
(US\$1.5 million)

Phase 1 investment required



7.9%

IRR



80

Permanent jobs



PROJECT INKUNZI ULTRA-LUXURY FLOATING HOTEL



LOCATION

V&A Waterfront, Cape Town, City of Cape Town, Western Cape Province.



PROJECT DESCRIPTION

An ultra-luxury floating hospitality and tourism infrastructure asset proposed for the V&A Waterfront precinct, positioned around strong international demand, marine tourism, luxury retail and established tourism infrastructure.



PROJECT TYPE / DEVELOPMENT

Greenfield



STATUS

Project Concept, Pre-Feasibility & Market Assessment Study developed. Funding required for Feasibility Study & Technical Studies.



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PROJECT INKUNZI ULTRA-LUXURY FLOATING HOTEL



R250 MILLION

(US\$15.4 million)

Total investment value



160-220

Permanent jobs



R25 MILLION

(US\$1.5 million)

Investment required



18-24 MONTHS

Project duration



355-500

Temporary jobs



8 PHASE

Development programme



FRAMORA HOTEL



LOCATION

Bela-Bela Local Municipality, Waterberg District Municipality, Limpopo Province.



PROJECT DESCRIPTION

A proposed signature 5-star luxury retreat integrating hospitality, wellness and equestrian experiences. The hotel is planned with 59 rooms, an equestrian centre, conference venue, spa and wellness centre, bakery, dining, event facilities and future medical-wellness offerings.



PROJECT TYPE / DEVELOPMENT

Brownfield: Upgrade/Redevelopment



STATUS

Existing assets are operational as Chateau Country Lodge and Conferencing. Project Concept & Market Assessment Study developed. Environmental Impact Assessment (EIA), zoning and compliance completed. Funding required for land acquisition, upgrades and new assets.



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FRAMORA HOTEL



59

Planned rooms



EIA / ZONING

Completed



5-STAR

Luxury positioning



6 MONTHS

Project duration



4 PHASES

Development programme



PROTEA HOTEL GQEBERHA – VILLA FELICE

4-STAR HOSPITALITY DEVELOPMENT



LOCATION

Gqeberha, Nelson Mandela Bay, Eastern Cape Province.



PROJECT DESCRIPTION

A proposed 150-room branded 4-star hotel with conference and meeting facilities, restaurant, bar and lounge, swimming pool, fitness amenities, landscaped outdoor spaces and secure parking, aligned with international Protea Hotels by Marriott standards.



PROJECT TYPE / DEVELOPMENT

Greenfield



STATUS

Master Planning and Market Assessment Study completed. Currently in the pre-approval and planning phase. Funding required for land acquisition and development.



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PROTEA HOTEL GQEBERHA – VILLA FELICE 4-STAR HOSPITALITY DEVELOPMENT



R350 MILLION

(US\$21.5 million)

Total investment value



300–500

Indirect jobs



R75 MILLION

(US\$4.6 million)

Funding gap



120–180

Permanent jobs



250–400

Direct jobs



24–36 MONTHS

Project duration







INVEST IN
TOURISM INFRASTRUCTURE
SOUTH AFRICA
INVEST IN GROWTH



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#MEETSOUTHAFRICA