



UN Tourism

## TOURISM DOING BUSINESS INVESTING IN



### Summary and Project Portfolio

For the complete publication, please visit:  
[Tourism Doing Business: Investing in South Africa](#)



**tourism**

Department:  
Tourism  
REPUBLIC OF SOUTH AFRICA



SOUTH AFRICAN TOURISM



# Executive Summary



## Overview of South Africa

The Republic of South Africa (hereafter South Africa) is the southernmost country on the African continent, covering a land area of approximately 1.2 million m<sup>2</sup>. **With a population of around 62 million, it is one of Africa's largest economies and a key gateway for trade and investment in the region.** Strategically positioned at the crossroads of major global shipping routes, South Africa serves as a crucial economic and tourism hub for Africa and beyond.

South Africa has a highly diversified economy, with a well-established tourism sector supported by world-class infrastructure, a pro-business regulatory environment, and a growing middle class that drives both domestic and international tourism.

### Strong and growing tourism potential

South Africa has established itself as one of the most prominent tourism destinations in Africa, bolstered by government-driven initiatives to enhance infrastructure, connectivity, and investment opportunities. In 2024, the country recorded over 8.9 million international arrivals, marking a strong recovery towards pre-pandemic levels, alongside 46.8 million domestic trips. Both segments show strong growth projections for 2025 and beyond.

### Key drivers for South Africa's tourism sector growth:

- **Exceptional Natural Diversity**

South Africa stands out as a global leader in biodiversity-based tourism, offering iconic wildlife experiences, from Big Five safaris to twenty national parks.

- **Unique Cultural and Heritage Assets**

From Robben Island and the Cradle of Humankind to vibrant township experiences and indigenous crafts, South Africa offers immersive cultural products that attract a wide spectrum of travellers. With twelve UNESCO World Heritage Sites, spanning cultural, natural, and mixed categories.

- **Strong Regional and International Demand**

With 76% of international arrivals from the African continent and growing long-haul interest from markets like the United States of America, United Kingdom and Germany, the country has a dual demand base that ensures year-round tourism activity.

# 5 REASONS TO INVEST IN SOUTH AFRICA'S TOURISM SECTOR



1



## Diversified tourism market with local scalability

South Africa's tourism sector is anchored in a strong intraregional market, with Africa accounting for 76% of all international tourist arrivals. This provides a stable and scalable visitor base, complemented by increasing demand from long-haul markets such as the United States of America, the United Kingdom and Germany. The presence of demand across luxury, mid-range and budget segments allows investors to mitigate risk while catering to diverse and evolving traveller preferences through a wide range of product offerings.

2



## World-class infrastructure and connectivity

South Africa presents a highly attractive environment for tourism investment, supported by its advanced infrastructure, strategic connectivity, and forward-looking reforms. It hosts Africa's most connected air network, the continent's largest port, and over 750,000 km of roads, offering unmatched accessibility for both tourists and investors.

3



### World-class infrastructure and connectivity

South Africa offers a robust package of incentives, co-investment mechanisms and a growing innovation ecosystem. Between 2019 and 2024, it attracted over USD 3.1 billion in VC, supported by 202 active funds. The tourism sector benefits from targeted incubators, funding schemes, and the country's strong legal and institutional frameworks, including support from the South African Investment Authority and the Department of Trade, Industry and Competition (DTIC).

4



### Innovation and sustainability leadership

South Africa is driving a green transition across its tourism sector through clean energy integration, sustainable transport, and circular economy practices. Programmes such as the Green Tourism Incentive Programme (GTIP) and the Renewable Energy Independent Power Producer Procurement Programme (REIPPPP) support investments in energy efficiency, low-impact mobility, and waste innovation, aligning with global sustainability trends.

5



### A young, urban and skilled talent pool

South Africa's human capital is one of its strongest assets. With 56% of the population under 30 and an adult literacy rate of 95%, the country provides a broad and adaptable labour base. Supported by advanced universities and national skills development efforts such as those led by the Culture, Art, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA), the tourism workforce is prepared for inclusive, service-oriented growth.



# TOURISM INFRASTRUCTURE PROJECTS



1. Hole-in-the-Wall
2. Orpen Kruger Lodge
3. God's Window Skywalk
4. Water World Fun Park
5. Eye of Menlyn
6. Tokai Manor, Table Mountain National Park
7. Skukuza Rest Camp, Kruger National Park (KNP)
8. Groote Schuur Restaurant



# Geographic Location



# HOLE-IN-THE-WALL RESORT

01



## Description

A Bay with a huge detached cliff that has a giant opening carved through its centre by the waves. The development will include the following:

- A 4-star hotel with 100 rooms,
- Day Visitor Facilities, which include Indoor Dining Facilities, Bar Area, Boma and Swimming Pool,
- A 500-seater conference facility,
- Other facilities, include a Restaurant, Lounge, Health Spa, Fitness Centre.

## Type of Investment

Equity Partnership/Debt.

## Status

- All planning processes are complete, including a scoping document.
- Private development needs investment partner.
- Significant progress concerning the construction of the road linking the Hole-in-the-Wall to Coffee Bay.
- Significant progress made on Spatial Planning & Land Use Management Act (SPLUMA) approvals and bulk infrastructure commitments.

## Project Impact

**Jobs: 100+ (temporary); 85 (permanent)**



## Estimated Total Investment

**R315 million (USD 17.8 million)**

- Investment required (40%):  
**R141.5 million (USD 7.9 million)**



## Contact (Project Manager)

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## Location

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



# ORPEN KRUGER LODGE

02



## Description

- A resort with Chalets just outside the Orpen Gate of the Kruger National Park, next to Manyeleti Game Reserve. Phase 1 of the project has 10 chalets and was launched in December 2022 with the official opening graced by the Deputy Minister for Tourism.
- Phase II: Development of 10 additional chalets.
- Phase III: Development of a 144-room hotel [Phase III is a commercial venture open to debt finance from the Industrial Development Corporation (IDC) and Equity from investors].

## Type of Investment

Equity/Debt Partnership

## Status

- First phase of the Lodge is operational
- Operator has other properties in the Free State, Gauteng and the Western Cape provinces

## Project Impact

- Local Economic Development
- Ownership/shareholding
- **Jobs: 100 (Temporary) and 80 (operations)**



## Estimated Total Investment

**R129 million (USD 7.2 million)**

- **Investment required at 40% of the project cost = R38 million (USD 2.1 million)**
  - Phase 1: R19 million [USD 0.988 million] (launched in December 2022)
  - Phase II: R15 million [USD 0.780 million] for the development of 10 additional chalets
  - Phase III: R95 million [USD 4.9 million] for the hotel



## Contact (Project Manager)

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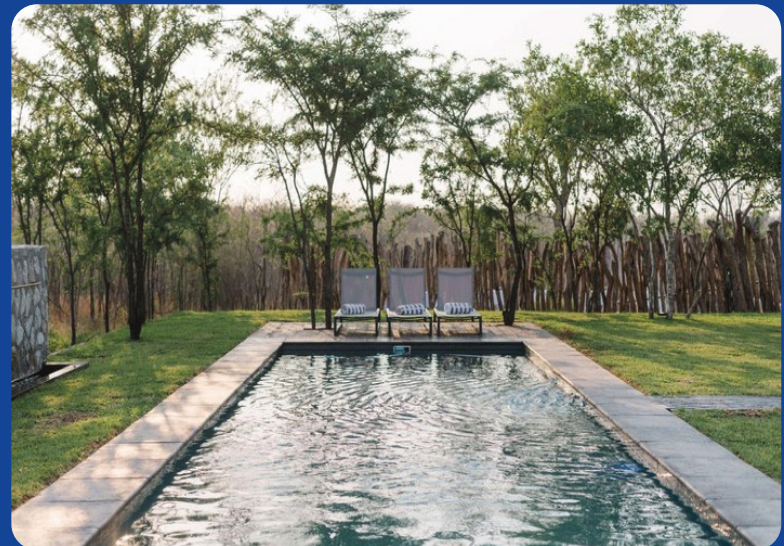
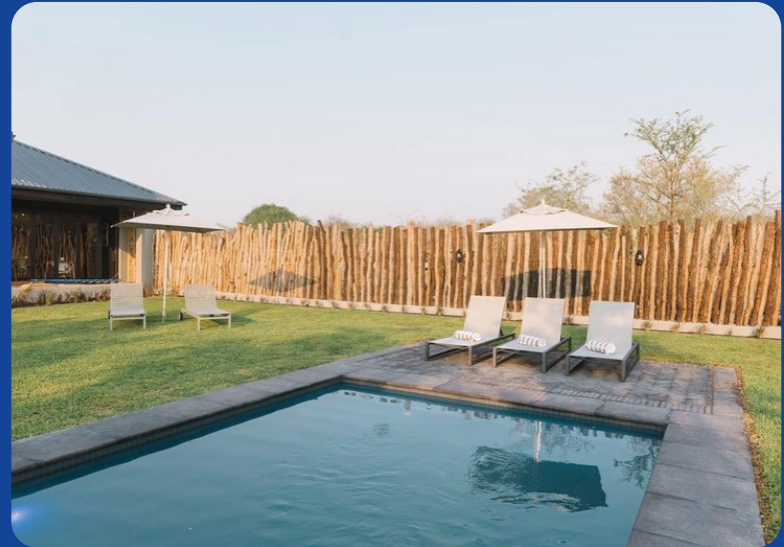
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## Location

Near Orpen Gate, Kruger National Park (next to Manyeleti Game Reserve), Bushbuckridge Local Municipality, Mpumalanga Province.





# GOD'S WINDOW SKYWALK

03



## Description

Situated on the Drakensberg escarpment in Mpumalanga is God's Window. With magnificent views, canyons, rock formations and waterfalls, God's Window has breathtaking scenic splendor.

The development will consist of a cantilevered glass suspended over the edge of a cliff, protruding about 12 metres outward. The skywalk will offer visitors a panoramic view of the Lowveld with a drop of more than 900m down into the local indigenous forest-clad ravine.

## Type of Investment

Commercial PPP, Equity and Debt Partnership

## Status

Feasibility study, Environmental Impact Assessment (EIA) completed and long-term lease signed

## Project Impact

**Jobs: 300 (temporary); 100 (permanent)**



## Estimated Total Investment

**R315 million (USD 17.8 million)**



## Contact (Project Manager)

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Tourism Group



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## Location

God's Window, Panorama Route, Thaba Chweu Local Municipality, Mpumalanga Province.





# WATER WORLD FUN PARK

04



## Description

Refurbishment of existing structures and the completion of the Water World Fun Park project. This includes restoring incomplete works, upgrading infrastructure and ensuring the facility meets quality, safety, and operational standards.

## Type of Investment

Commercial PPP, Equity and/or Debt Partnership

## Status

- Masterplanning and Market Study developed.

## Project Impact

**Jobs: 100 (temporary); 20 (permanent)**



## Estimated Total Investment

**R194 million (USD 10.9 million)**

- **Funding Gap: R80 million (USD 4.5 million)**



## Contact (Project Manager)

### Mr Oyama Makalima

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Buffalo City Metropolitan  
Development Agency



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## Location

Water World Fun Park. East London, Buffalo City Metropolitan Municipality, Eastern Cape Province.



# EYE OF MENLYN

05



## Description

The owning entity intends to establish and operate an Observation Wheel at Mowana Property-managed Menlyn Park, deemed the Eye of Menlyn, or Menlyn Sky-Wheel or "Menlyn Eye". The Observation Wheel, at a suitable height (minimum height of c.40m) will consist of about 30 luxury and climate controlled cabins, each with a carrying capacity of 8-10 people. The Wheel will offer experiences such as Cabin trips, digital photo booths and Special events booking, including conferences and meetings. A Minimum of two cabins will be designated VIP, with exclusive amenities and luxury champagne experiences.

## Type of Investment

Debt/Equity Partnership

## Status

- Project Concept and Market assessment Study developed.

## Project Impact

**Jobs: 50-100 (temporary); 30 (permanent)**



## Estimated Total Investment

**R25 million (USD 1.4 million)**



## Contact (Project Manager)

**Ms Nobesuthu Kubheka**  
Project Co-ordinator



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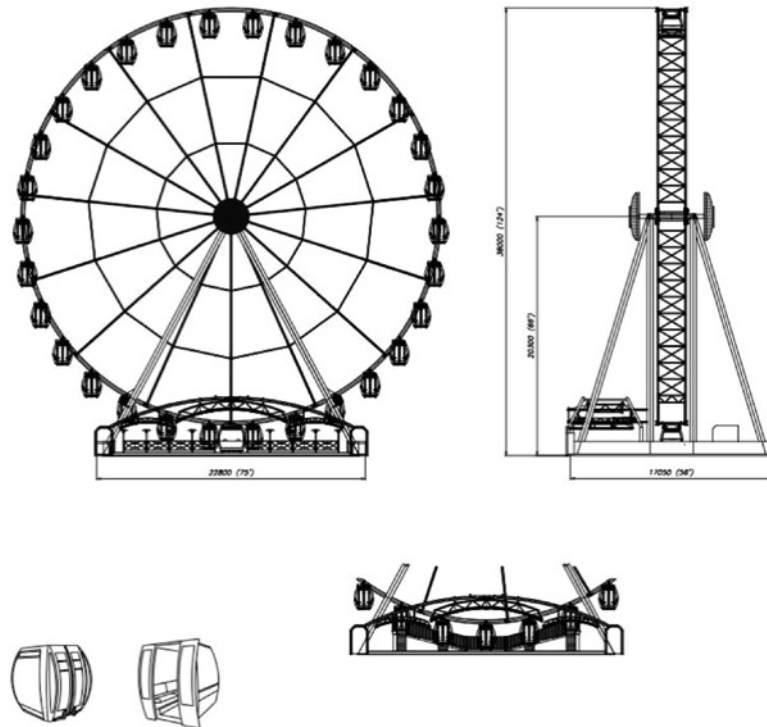


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## Location

Pretoria, Tshwane Metropolitan Municipality, Gauteng Province.





# TOKAI MANOR, TABLE MOUNTAIN NATIONAL PARK

06



## Description

Tokai Manor Precinct is designated in the Table Mountain National Park (TMNP) Park Management Plan as a high-volume, mixed-use destination visitor site in zones designated for both high- and low-intensity leisure. It has the potential to serve as a multi-use eco-tourism facility with related tourism activities. Opportunity for an Operator to operate and maintain multi-use eco-tourism facilities with related tourism activities.

## Type of Investment

Commercial PPP, Equity and Debt Partnership

## Status

- Financial Feasibility Study completed
- National Treasury PPP approvals

## Project Impact

**Jobs: 150 (temporary); 120 (permanent)**



## Estimated Total Investment

**R69 million (USD 3.9 million)**



## Contact (Project Manager)

### Ms Antionet Van Wyk

General Manager:  
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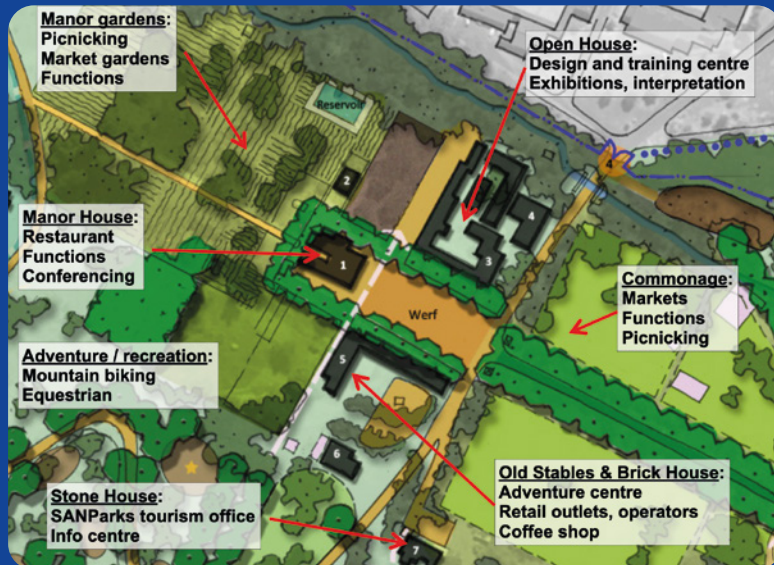


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## Location

Table Mountain, City Cape Town, Western Cape Province.



# SKUKUZA REST CAMP, KRUGER NATIONAL PARK

07



## Description

Upgrading of Skukuza Rest camp Rondavels phase 4. SANParks commenced with a significant upgrade of the Skukuza Rest Camp in Kruger National Park to renew and advance the product offering. An estimated R90 million will be needed to upgrade 36 rondavels, 6 family cottages, and Nyathi Guest House. Planning for the project was completed with detailed designs and cost estimates available.

## Type of Investment

Commercial PPP, Equity and Debt Partnership

## Status

- Financial Feasibility Study completed
- National Treasury PPP approvals

## Project Impact

**Jobs: 130 (temporary); 14 (permanent)**



## Estimated Total Investment

**R90.2 million (USD 5 million)**



## Contact (Project Manager)

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## Location

Skukuza, Mbombela, Ehlanzeni District Municipality, Mpumalanga Province.







# GROOTE SCHUUR ESTATE TEA ROOM AND RESTAURANT

08



## Description

Groote Schuur Estate Tea Room and Restaurant, located within the northern section of Table Mountain National Park, is recognised as a mixed-use, high-intensity leisure node within the Table Mountain National Park zoning framework. It has strong cultural, historical, and recreational value. Aiming at constructing new assets and upgrading of existing assets - The PPP provides a selected private party with the rights to the commercial use of the Groote Schuur Estate Tea Room and Restaurant. The opportunity includes operating a restaurant, function venue, curio retail shop, and related tourism activities.

## Type of Investment

Commercial PPP, Equity and Debt Partnership

## Status

- Financial Feasibility Study completed
- National Treasury PPP approvals

## Project Impact

**Jobs: 60 (temporary); 25 (permanent)**



## Estimated Total Investment

**R20 million (USD 1.1 million)**



## Contact (Project Manager)

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## Location

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





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