



SOUTH AFRICAN TOURISM

TOURISM ROUTE DEVELOPMENT MARKETING PLAN (TRDMP)

Report for the Portfolio Committee on Tourism

South African Tourism

10 March 2026

ABBREVIATIONS

ABBREVIATION	FULL FORM
APP	Annual Performance Plan
ATI	Africa's Travel Indaba
BARSA	Board of Airline Representatives of South Africa
KPI	Key Performance Indicator
MPIF	Market Prioritisation Investment Framework
TBCSA	Tourism Business Council of South Africa
TRDMP	Tourism Route Development Marketing Plan
YOY	Year on year

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TOURISM ROUTE DEVELOPMENT MARKETING PLAN

TOURISM ROUTE DEVELOPMENT MARKETING PLAN (TRDMP)



BACKGROUND

The Tourism Sector Master Plan identifies ease of access, particularly air connectivity, as one of the critical priorities for tourism economic growth. However, South Africa does not have a nationally coordinated route development mechanism for tourism despite being a long-haul destination; this undermines the destination's competitiveness.

Despite successes of the few provincial route development structures, a gap remains at national level and in some provinces (where there are no route development structures).

To this end there are several core initiatives which SA Tourism is responsible for:

- 1) TRDMP service provider procurement
- 2) Support for Aviation/Air Access platforms
- 3) Collaboration with Industry
- 4) Marketing initiatives

On the 4th of December 2024, Cabinet approved the Tourism Route Development Marketing Plan (TRDMP) for implementation. Implementation of the TRDMP, working with other relevant stakeholders in both public and private sector, aims to support the increase in direct connectivity to and from South Africa and within South Africa in a manner that enables sustainable tourism market development and growth.

TOURISM ROUTE DEVELOPMENT MARKETING PLAN (TRDMP)

The Tourism Route Development Marketing seeks to:

- Ensure marketing support and alignment with provincial route development structures by consolidating efforts and eliminating unnecessary competition in global platforms;
- Avoid double dipping and the race to the bottom by the currently uncoordinated route development structures, as they compete in global platforms;
- Ensure effective usage of the country's resources by promoting rationalisation of tourism marketing route development and derive greater value for the country;
- Outline the marketing support package to entice the airlines and ensure South Africa's competitiveness; and
- Open new tourism source markets, grow and sustain existing tourism markets and work towards addressing seasonality swings through route development



TOURISM ROUTE DEVELOPMENT MARKETING PLAN (TRDMP)

To ensure success, SA Tourism is working closely with tourism value chain stakeholders and provincial structures, engaging in joint marketing efforts to attract travellers in a unified approach. Joint resource allocation will be critical, highlighting the importance of effective partnerships across the tourism value chain.

The programme:

- Aligns with national tourism objectives.
- Fosters collaborative public-private partnerships throughout the tourism value chain.
- Targets strategic tourism markets, including China, India, and regional African connections as well as maintaining strong presence in our top markets
- Utilizes data-driven decision-making to prioritize tourism route marketing.

It is intended that the implementation of the TRDMP will be rolled out in the 2026/27 Fiscal Year.





AVIATION INSIGHTS 2025/26

SUMMARY

There are 9.0 million seats on international routes from July 2025 to June 2026 and this is up 11.2% over the previous 12-month period. The top growth in seats is driven by the growth on the African continent and also on Asian routes. Top growth markets include Rwanda, Tanzania, Ghana, Gabon, Botswana from Africa and Hong Kong and Singapore from Asia



SA's largest carrier based on Seat Capacity

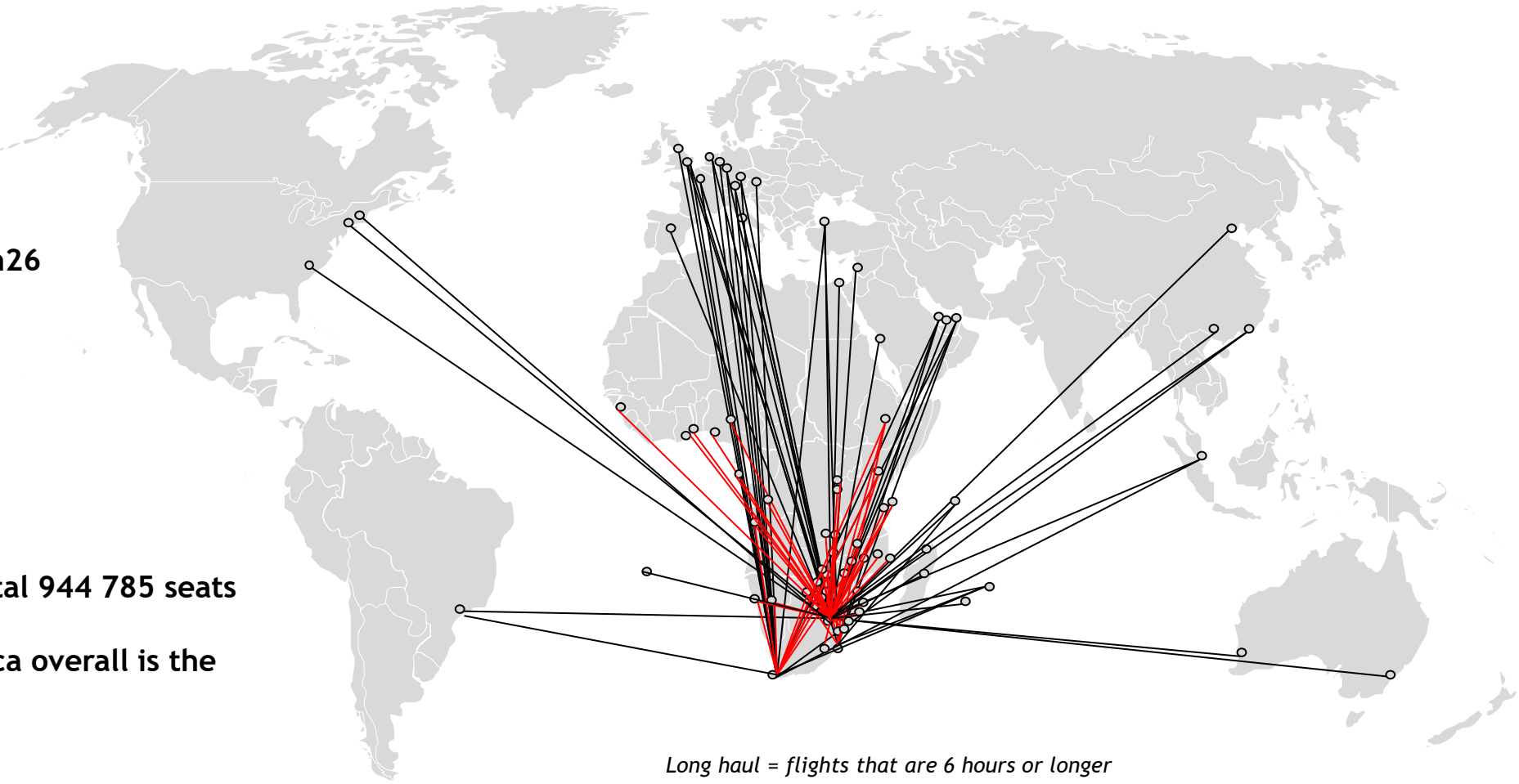
**1 538 094 seats from Jul25-Jun26
[8.2% growth over Jul24-Jun25]**



SA's largest source city with total 944 785 seats

The largest route to South Africa overall is the Dubai to Johannesburg

**1 452 flights from Jul25-Jun26
[27 flights per week]**



Long haul = flights that are 6 hours or longer



Seven major markets lack direct air access to South Africa: Russia, India, Japan, Spain (*but not for long*), Italy, Ireland, and Canada. Additional strategic markets without direct connections include Malaysia, Thailand, and countries in Eastern Europe. Belgium, Saudi Arabia, Israel, Chad, Togo, Cote D'Ivoire lost air routes that were active in previous years

MPIF 2.0 Markets with no Direct Air Access:



Russia



Japan



India



Ireland



Italy

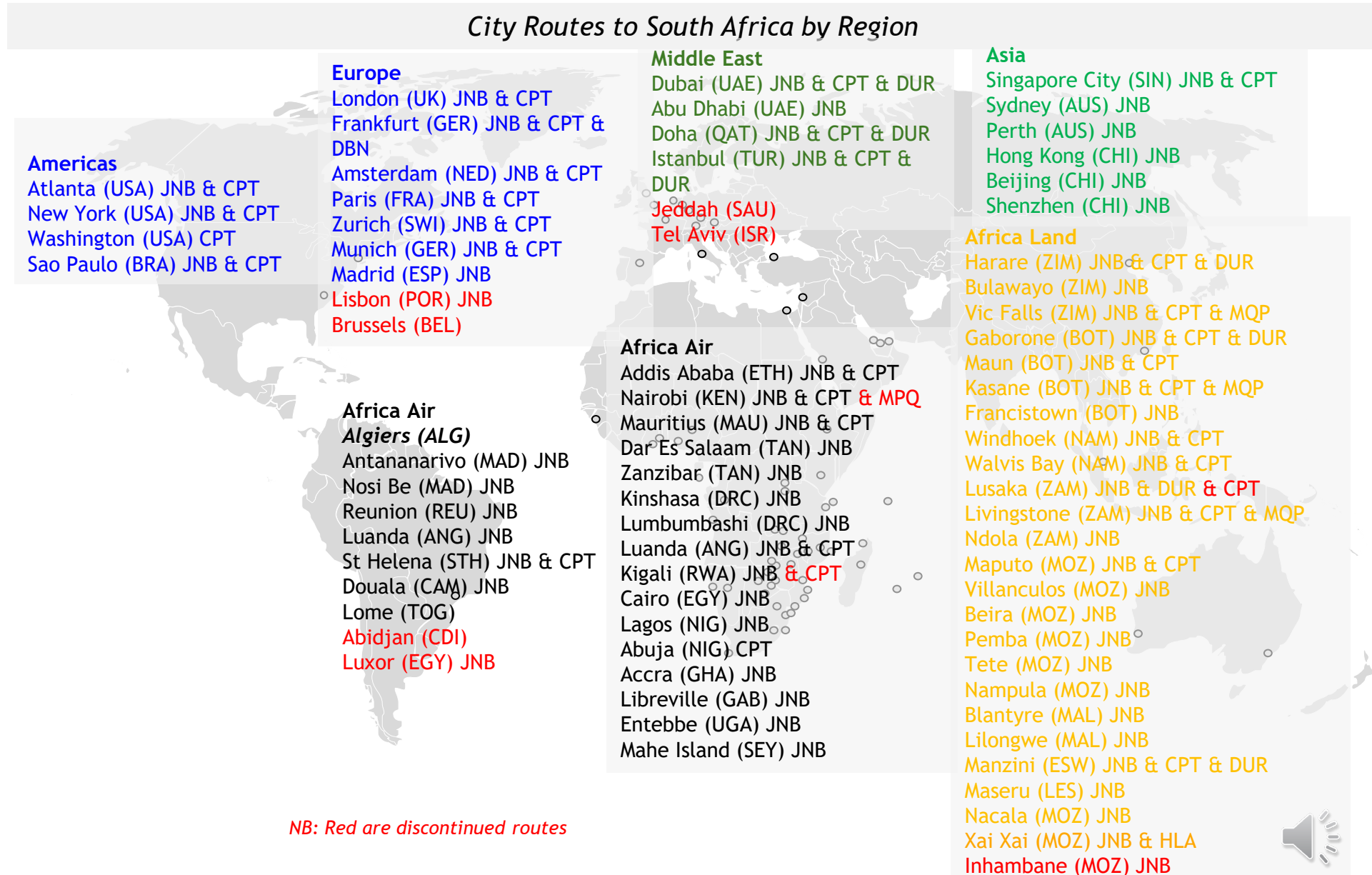


Spain 



Canada

City Routes to South Africa by Region



Recent Developments April - June 2025

April

Qatar increased Doha to Maputo with Durban as a second leg (to 7 per week). This follows other increases for connections in Africa (Entebbe, Dar Es Salaam and Tunis)

Namibia in discussion to launch a national carrier

Mozambique LAM discontinued flights to Cape Town from April 8

Qantas schedules return to Perth route from December 2025 and connection to Auckland as well

Air Botswana route Gaborone to Durban increased frequencies

SAA seeking 5th freedom rights to connect Ghana to USA this is targeted for launch in 2026 if approved

May

SAA increase Windhoek to 3 daily flights. SAA also adding domestic George to Johannesburg route

TAAG Angola increasing flights to Portugal over Christmas. Also TAAG increasing frequencies on routes key for Brazilian connections including Johannesburg, Cape Town and Maputo

AirAsia set to stop Nairobi – Kuala Lumpur from 1 September 2025

SAA delays route launch to India with configuration being a factor in the type of aircraft to purchase

Air France announce daily frequencies to Cape Town for December 2025 until mid-January 2026

Benin collaborating with Qatar Airlines on national carrier

ITA considering resuming Italy route when it becomes commercially viable

June

Air Tanzania expands Zanzibar – Johannesburg operating in a triangle with connections in Dar Es Salaam

South Africa is at risk of losing European and American flights over civil aviation investigation capacity

Air Côte d'Ivoire suspends flights to SA, set to resume again in October 2025

Cathay Pacific goes daily to Johannesburg from 1 July

Edelweiss increases Cape Town connections for seasonal routes from 4 to 5 weekly

Air India suspends Nairobi flights until 15 July

Singapore Airlines increased frequencies to 12 a week to JNB and 7 a week to Cape Town

Recent Developments July – September 2025

July

OR Tambo delays due to slow passenger vetting update stating that passengers need to arrive 2 hours before for domestic flights and 3 hours before for international flights

Proflight Zambia increased frequency from September 2025 until January 2026, which is the peak demand period

Safair launches Cape Town to Hoedspruit route to expand capacity to Limpopo and Kruger National Park

FlyGabon introduced a twice-a-week flight from Johannesburg and Libreville

SAA set to add routes to Gaborone in October and a Cape Town to Mauritius in November

Despite Mango being in the final stages of relaunch, the process has been halted

August

Qatar Airlines increased its African capacity with Cape Town. Johannesburg and Casablanca are experiencing increasing frequencies

Safair labour agreement reached with pilots, ending a pilot strike

Proflight is launching Lusaka to Windhoek via Livingstone

14% more seats added on the London to Cape Town route, with a month-long extension on Virgin Atlantic

Rwandair has increased seats to South Africa from June 2025, and further increases are expected from December 2025 going forward into 2026

Safair launches Lanseria to the Eastern Cape, to both Gqeberha and East London

US United Airlines is reducing Johannesburg flights and increasing Cape Town flights from October

Etihad is increasing Windhoek flights to 14 flights per week, up from 4 flights

September

SAA is launching flights to Gaborone from November 2025, and ticket sales will be available from the beginning of September

Air Asia suspends the Nairobi route from Kuala Lumpur

SAA increases frequencies to Lagos, Accra, and São Paulo. The West African routes are increasing in October, and the South American route will start from December 2025

Selfie Visa expected to launch in September. Electronic Travel Authorisation system powered by AI and smartphone-enabled

FastJet launch new morning flight from Harare to Johannesburg from 29 September 2025 – 6 days a week

Emirates launch Premium Economy flights on Boeing 777 to Johannesburg and Cape Town the first of their kind on the continent

Algeria and SA return to talks after signing of MoU. Flight connection discussions resume after the signing

Recent Developments October 2025 – January 2026

October

Fly Safair launched a route between Hoedspruit and Cape Town from 2 October 2025

Cem Air launched new route from 13 October 2025 from Cape Town to East London

New airline announcement Flynia set to launch passenger services with routes serving the continent. The airline will be the first black-female-led airline expected to be launched in 2026, following SACAA registration completion

South Africa and Algeria signed an air travel agreement for passenger and cargo routes as part of efforts to strengthen intra-African trade

SAA applies for an amendment to the licence to enable flights to Doha (daily) and Zanzibar (unlimited)

Air Europa intend to connect Spain and South Africa with approval for 3 flights a week

Cape Winelands Airport secures environmental approval for airport expansion

November

SAA launch Gaborone route twice-daily from November 4

Airlink announced 2026 new services to Zanzibar (twice-weekly) from February and Nacala, Mozambique (twice-weekly) from June. Also applied for the Lanseria to Zimbabwe licence as well as the Cape Town Zanzibar service

Malawi Airlines increases Johannesburg frequencies to 10 flights per week on the Lilongwe route

SA is working to unlock Nigeria for SAA and Airlink, seeking 5th freedom rights, including both Johannesburg and Cape Town

CemAir George to Hoedspruit set to launch in May 2026, announced

LATAM set to launch Cape Town three-weekly flights

Emirates is adding a third daily Cape Town route with onward connection on domestic SAA flights on a single ticket

Air Tanzania set to launch Cape Town via Victoria Falls route with twice-weekly flights on Thursday and Sunday

December

SAA and TAAG signed a codeshare agreement to enhance connections within the region

Qantas flight from Perth to Johannesburg with three weekly services

Lift plans flights from Durban to Mauritius, as well as Reunion

SAA launched Mauritius route from Cape Town operating three-times a week

January

Airlink set to start three weekly flights from Nacala to Johannesburg in February 2026

Air Europa Madrid to Johannesburg flights are expected from June 2026, with three flights scheduled

Air Algeria is launching in January 2026, three-weekly flights to Johannesburg, following the agreement between the two governments

Emirates announces A350 on Cape Town daily route.

LATAM set to connect São Paulo to Cape Town in September 2026

Lift clarifies no direct flight to Reunion; however, the owner, Global Aviation, is looking into this despite Lift not being directly involved

SAA and CemAir sign a code share agreement on integrating the domestic routes and international routes of both airlines

Qatar is increasing frequencies to a total of 42 from 35 from February 2026 onward

Fastjet is launching additional Harare and Bulawayo flights

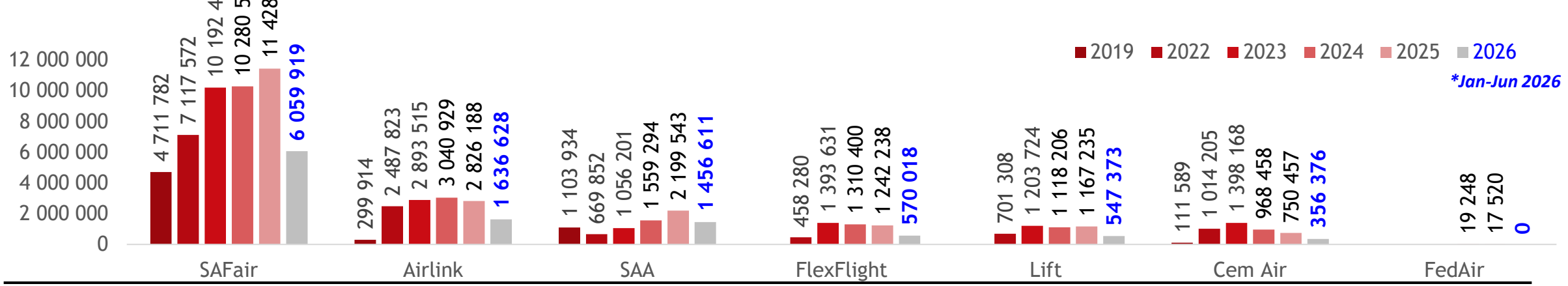
Source: Online news and Forward Keys
DATE: February 2026

In 2025, the seat supply grew 7% over the previous year. The drivers of growth are SafAir, SAA and Lift with increased seat capacity. Fares in 2025 (January to September) are higher than those in the same months in 2024 and exceed the pre-pandemic fares. Q1 2026 seats are up 5%

	2019	2022	2023	2024	2025	*2026
Flights	167 467 -2.1% yoy	125 644 +31.7% yoy 75% of 2019	144 895 +15.3% yoy 85% of 2019	144 176 -0.5% yoy 86% of 2019	148 311 +2.9% yoy 88% of 2019	81 146 +12.4% yoy 48% of 2019
Seats	21 759 774 +5.6% yoy	15 080 283 +24.8% yoy 69% of 2019	18 162 963 +20.4% yoy 83% of 2019	18 313 012 +0.8% yoy 84% of 2019	19 631 624 +7.2% yoy 90% of 2019	10 635 613 +12.4% yoy 46% of 2019
Air Fare	R1 363 -11.6% yoy	R1 575 +19.0% yoy 115% of 2019	R1 521 +10.9% yoy 111% of 2019	R1 597 +0.5% yoy 117% of 2019	* R1 438 +3.1% yoy 105% of 2019	*Jan-Jun 2026

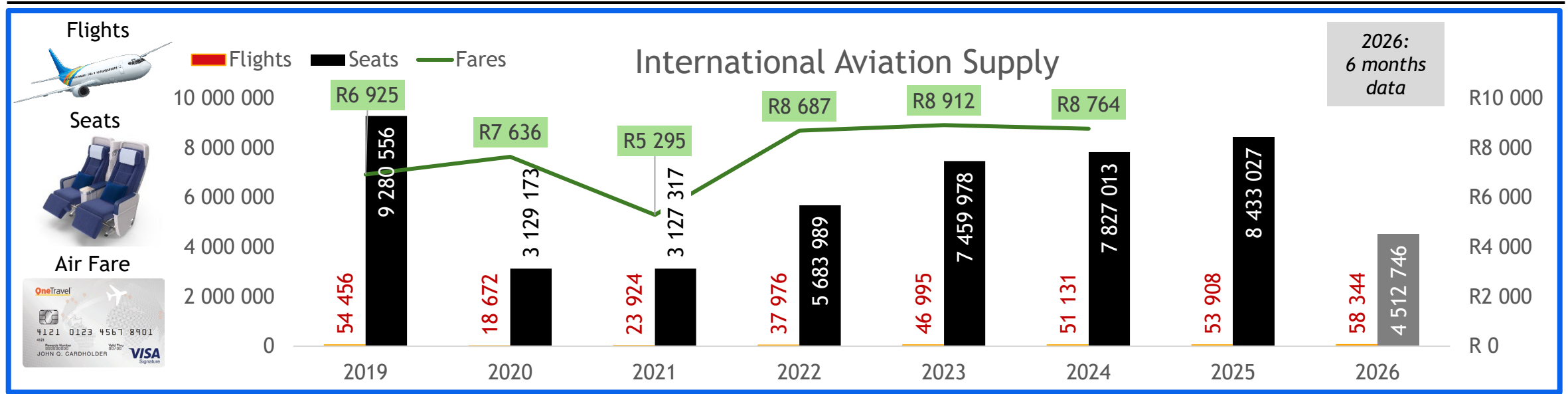


Top Commercial Airlines - Seat Capacity

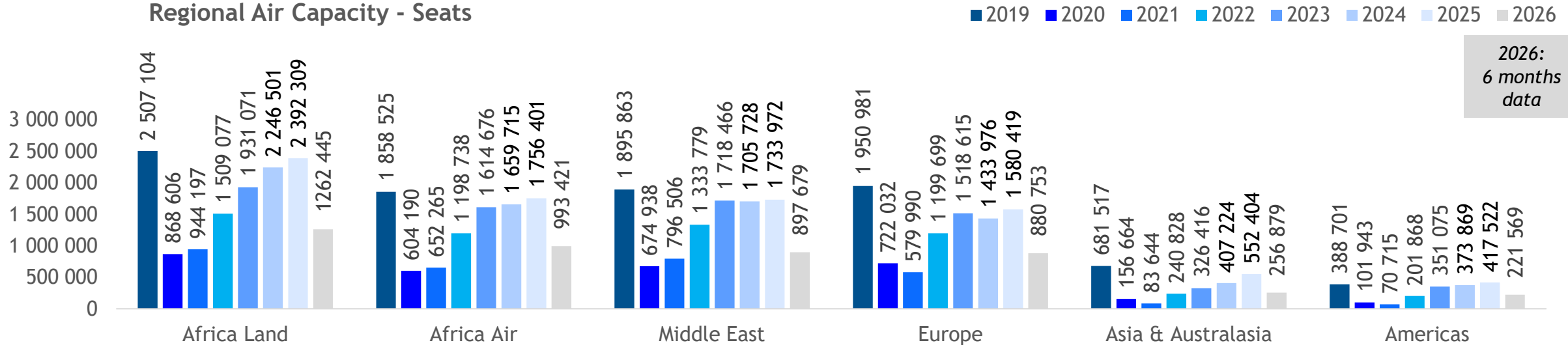


Source: Forward Keys
DATE: February 2026

The full year 2025 sees 7.7% more seats to South Africa and the top 5 airlines are African and Middle Eastern, and these airlines were driving the recovery of seat supply. Of the 8.4 million seats on 53,908 flights, Airlink was the top airline with over 1.5 million seats.



Regional Air Capacity - Seats



SOUTH AFRICAN TOURISM INITIATIVES

SA TOURISM APP - TRDMP / AIR ACCESS KPIs

PROGRAMME 5: OUTPUT INDICATORS: ANNUAL AND QUARTERLY TARGETS

OUTPUT	OUTPUT INDICATORS	2025/26 ANNUAL TARGET	QUARTERLY TARGETS			
			Q1 Apr - Jun 2025	Q2 Jul - Sep 2025	Q3 Oct - Dec 2025	Q4 Jan - Mar 2026
Promotion of increased air access for destination South Africa	Number of initiatives to support air access through the Tourism Route Development Marketing Plan implemented	Implement 4 initiatives to support air access through the Tourism Route Development Marketing Plan	Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan	Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan	Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan	Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan

Year to date initiatives detailed in subsequent pages



QUARTER 1 OVERVIEW

Output: Promotion of increased air access for destination South Africa
Quarterly target: Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan

Achieved: Africa's Travel Indaba (ATI) 2025 - Airline Pavilion

Africa's Travel Indaba has a long-standing reputation for bringing the global leisure tourism industry together in a warm and engaging fashion, while still maintain the value of business connections. The show attracts quality buyers who are specifically interested in destination Africa, from around the world. SA Tourism is committed to increasing airlift and forging new partnerships by providing market access and exposure for our airline partners.

The Airline Pavilion aims to fast track the sector's growth from an airlift perspective and yields significant benefits for the industry as it allows airlines to engage and collaborate on, amongst others, improved operational efficiencies, better customer experience and innovation.

- i. The Airline Pavilion expanded significantly this year, showcasing 15 airlines through 10 aviation stakeholders, a notable increase from last year's 6 airlines represented by 7 stakeholders.
- ii. Over 300 scheduled co-exhibitor meetings were held at the pavilion - with a high demand for both domestic (43%) and continental carriers (57%)

Africa's Travel Indaba - Fashion and Wine



The Airline Pavilion through two of its co-exhibitors, sponsored - Two return tickets on Kenya Airways and FlySafair.



QUARTER 2 OVERVIEW

Output: Promotion of increased air access for destination South Africa
Quarterly target: Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan

Achieved: Routes World 2025 - SA Pavilion and Air India Pitch Deck Inputs

Routes World 2025 brings together airlines, airports and aviation stakeholders from across the world to build air services and global economic growth. The event creates a platform for conversations between senior network planners that define the industry's global future. The global route development community came together for the 30th Routes World event in Hong Kong from 24 to 26 September 2025. Comprising of extensive meeting opportunities, exclusive industry insight and first-class networking opportunities, Routes World is a must-attend event.

In line with the TRDMP objectives of increasing direct air access from China and India, the SA delegation joined forces to pitch South Africa as a prime destination to Air India. The team developed a pitch deck and had a 50-minute meeting with the team in attendance. Unfortunately, SA Tourism wasn't at Routes World due to non-approval of travel however, the pavilion and meetings were well supported by our route development partners (listed below).



QUARTER 3 OVERVIEW

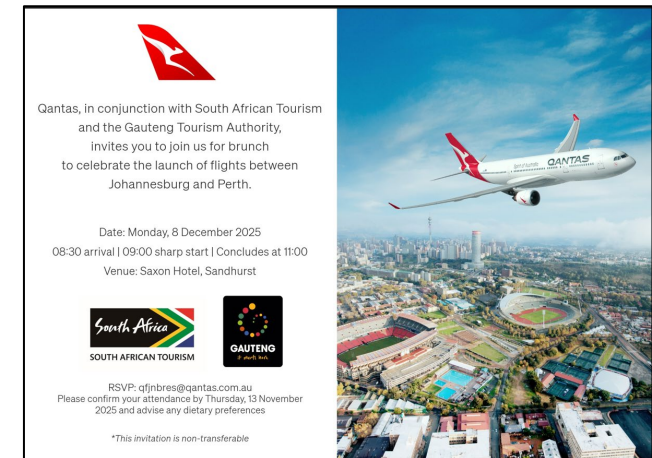
Output: Promotion of increased air access for destination South Africa
Quarterly target: Implement 1 initiative to support air access through the Tourism Route Development Marketing Plan
Achieved: Qantas Johannesburg_Perth Route Launch (Dec 2025)
SAA Cape Town_Mauritius Route Launch (Dec 2025)

Strengthening Connectivity Between South Africa and Australia!

The 07th of December 2025 marked an exciting milestone as Qantas launched its new Johannesburg-Perth direct route, a testament to the power of strong collaboration between government and industry. South African Minister of Tourism Patricia de Lille celebrated the launch, stating: “This route strengthens our Oceania links and gives travellers easy access to South Africa’s diverse experiences across all nine provinces.”. SA Tourism collaborated with Qantas and Gauteng Tourism Authority to promote the new route among stakeholders and media (South African and Australian). The celebratory event was held at the Saxon (Gauteng’s only TGCSA 5-Star Premium Property) with over 65 stakeholders in attendance. Furthermore, following SA Tourism’s and Qanta’s negotiations, the Australian media onboard the inaugural flight were hosted for four days by Trip-A-Deal, which allowed them to explore South Africa’s varied offering.

Saa Launches Strategic Cape Town-Mauritius Route

South African Airways (SAA) has launched a new direct service between Cape Town (CPT) and Mauritius (MRU), with its inaugural flight on Tuesday, 9 December 2025, underscoring the airline’s confident growth trajectory, a disciplined return to financial stability, and its mission to become Africa’s airline of choice. The inaugural flight departed at full capacity, reflecting strong market demand and affirming SAA’s momentum. The route will operate three flights per week, year-round, connecting two of Southern Africa’s most iconic destinations and expanding choice for leisure and business travellers. South African Tourism’s Chief Quality Officer, Bronwen Auret, added: “Enhanced air connectivity is the engine that drives tourism growth, strengthens trade and unlocks new partnerships. With South Africa recording an 18% year-on-year rise in arrivals from January to October, including a 14% increase from Mauritius, this route stands as a powerful reminder of what becomes possible when nations are connected.”



Provincial Air Access Committee Updates



Cape Town Air Access

- Hosted Western Cape Air Cargo Conference 2025
- Routes Asia in March, hosted in PER
- Emirates - 3rd daily year-round frequency between Dubai and CPT will be launched 1 July 2026.
- SAA - CPT-MRU service, starting on 9 December
- Condor - Added 41% more capacity to CPT
- Virgin Atlantic - Increase of 45% in forward bookings for CPT
- Delta Airlines - Want more frequencies to SA but not possible under current US - SA bi-lateral.



Durban Direct

- Air France - Club Med Development opening August 2026. Business case developed and submitted to airline
- IngiGo / Air India - new route. Joint SA business case developed and presented to Air India and Indigo Air
- Airlink increased its frequencies to 7 times a week for the Durban- Harare route
- Durban Direct launched a digital campaign targeting key source markets i.e. UK and US in September 2025. The key message is Get Onboard... KZN, Ready for Your Arrival
- UK in-market activation planned for February 2026



Gauteng Air Access Network

- SAA - Relaunch daily flights from OR Tambo International to Dar es Salaam on 20 Jan 2025
- FlyGabon - Johannesburg OR Tambo route launched on 02 July 2025, operates twice weekly. However the actual event to launch airline took place 06 September 2025
- Air Tanzania - Zanzibar Route to OR Tambo Johannesburg
- FlySafair to launched new routes effective 01 November 2025 from Lanseria International Airport to King Phalo Airport, East London - Six weekly flights
- FlySafair launched new routes effective 01 November 2025 from Lanseria International Airport to Dawid Stuurman International Airport, Gqeberha - Daily flights
- Qantas JHB-Per route launch Dec 2025

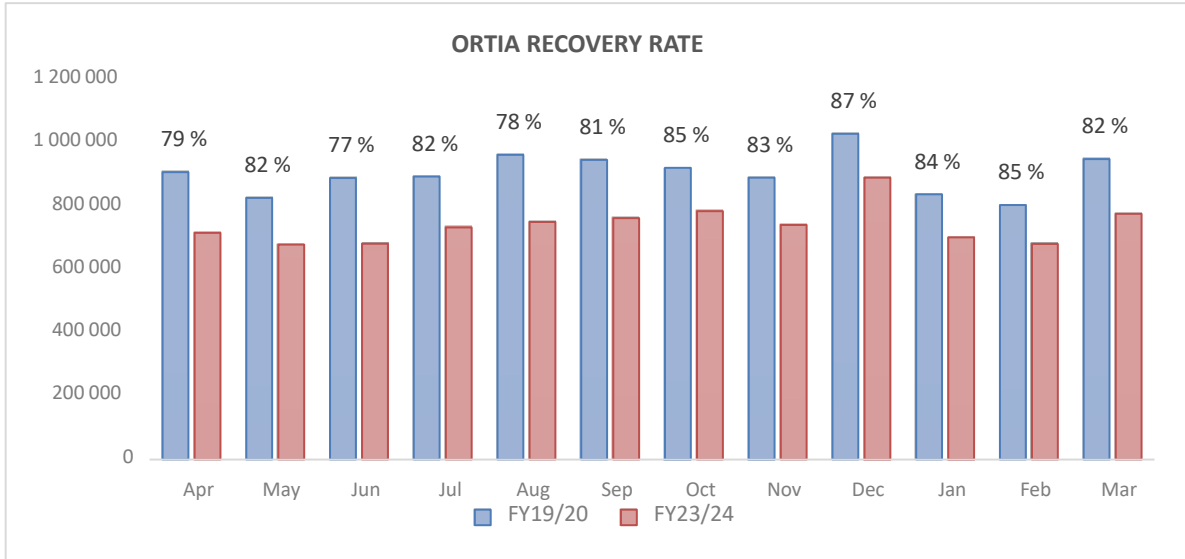
TBCSA Air Access Support 2024 - 2025

Gauteng Air Access Network x TBCSA



Date	Platform and Location	Purpose	Outcomes/Activities
October 2023	Routes World (Turkey)	Promote the Gauteng Air Access Network as a brand and provide a one-stop shop for air connectivity in Gauteng.	Meetings held with the following airlines: Air Portugal (TAP), Air India, Maldivian Airlines, China Southern Airlines, American Airlines, Lufthansa, Emirates, Virgin Atlantic, Sri Lankan Airlines, Brussels Airlines. These airlines remain on GAAN's radar and form part of the pipeline.
March 2024	BARSA Conference	Promote the Gauteng Air Access Network and network with the aviation sector. The conference is key for operating in the air access space because all important stakeholders in the domestic, regional, and international aviation industry attend.	Engagements with Air Mauritius, Air France KLM, Qatar, Emirates, Proflight Zambia, Fastjet, Air Charter Service, Clyde & Co, ATNS, CAA, Domestic Licencing Council, International Licencing Council, National Department of Tourism (NDT), Department of Transport (DOT), South African Tourism (SAT), Gauteng Tourism Authority (GTA).
March 2024	Web in Travel (WIT)	Promote the Gauteng Air Access Network and network with the aviation sector.	Gauteng Air Access exhibited and attended the conference. Speakers included local and international travel trade representatives and airlines such as United Airlines, CemAir, Rwanda Air, Virgin Atlantic, Lift, Singapore Airlines. ASATA and Mastercard also spoke at the conference.

Impact on Arrivals



The Gauteng Air Access initiative successfully met its objectives, significantly enhancing air connectivity, promoting economic growth, and boosting tourism in the region.

The role of partnerships has been key in unlocking new opportunities that allow Gauteng Tourism Authority (GTA) to achieve Air Access goals.

The below table highlights the new routes established and increased frequency:

Route Commencement	Airline - Route	New Route	Increased frequency since route launched	Visitor numbers
June 2023	Zambia Airways: Lusaka to Johannesburg	X	X	10,569 (since June 2023 launch)
August 2023	Air Algérie: Algiers to Johannesburg	X		5,000 (August 2023-February 2024)
Route Commencement	Airline - Route	New Route	Increased frequency since route launched	Visitor numbers
September 2023	LATAM: Sao Paolo to Johannesburg	X		Figures not yet released
September 2023	SAA: Sao Paolo to Johannesburg	X		54,672 (since launch and forward bookings)
October 2023	Saudia: Riyadh to Johannesburg	X		Figures not yet released
November 2023	SAA: Abidjan to Johannesburg	X		Note: Abidjan is part of the Accra route. Unable to segregate Accra and Abidjan for reporting
April 2024	SAA: Johannesburg to Perth	X		20,379 (launched April and forward bookings)

The R5 million investment provided by TBCSA has been effectively deployed to deliver a series of initiatives that collectively reposition KwaZulu-Natal as a globally competitive, well-connected, and investment-ready destination.

Through the integration of marketing, data analytics, and stakeholder engagement, Durban Direct has strengthened both the province’s brand presence and its operational readiness to attract new air services.

The digital campaign has already generated significant international visibility; the business case work will produce the intelligence required for airline negotiations; and the upcoming engagements, the Fam Trip and UK Activation, will translate momentum into tangible opportunities.

These initiatives demonstrate how strategic partnerships between national and provincial bodies can yield lasting impact. They showcase TBCSA’s role not only as a funder but as a catalyst for coordinated tourism and trade growth across South Africa.

Task	Description	Amount	Status
Durban Direct Digital Campaign	<ul style="list-style-type: none"> Value Proposition / Campaign development Collateral development Online strategy and campaign Media plan Media buying 	R3.5m	Campaign underway and will conclude in December 2025
Business Case Development	<ul style="list-style-type: none"> Business Cases for key target airlines BA Qatar Turkish Airlines 	R500 000	TORs developed and advertised in October. Service provider to be appointed by November 2025
Airline Marketing Support	Fam Trip for top tier airlines	R500 000	On track for March 2026
In country Activation	UK	R500 000	On track for February 2026
Total		R5m	



THANK YOU



SOUTH AFRICAN TOURISM