

WISE MOVE

The 2026 South African Migration Report

Movement,
Momentum,
and Migration

Welcome to the 2026 South African Migration Report

A word from our CEO

Population movement in South Africa is rarely accidental. At scale, relocation reflects how households respond to employment opportunities, affordability, access to services, and shifting regional conditions. While each move represents an individual decision, taken together they form a measurable record of economic adjustment.

The Wise Move 2026 Migration Report analyses anonymised data from more than 30,000 household moves across South Africa. This dataset provides a detailed view of how South Africans are relocating — across provinces, between cities, along key corridors, and over time. When combined with national migration statistics, it offers a grounded perspective on internal migration.

Each move represents not only a change of address, but also economic activity involving households, moving providers, labour, and related local services.

As a platform operating across the moving sector, Wise Move has visibility into migration at both household and industry level. This allows us to contribute practical, data-led insight into relocation trends, semigration patterns, housing affordability, and the changing shape of movement in South Africa.



This report is intended to serve as a reference point — grounded in data, focused on patterns, and designed to support informed analysis of how South Africans are moving today.

Chante Venter
Co-Founder and CEO, Wise Move

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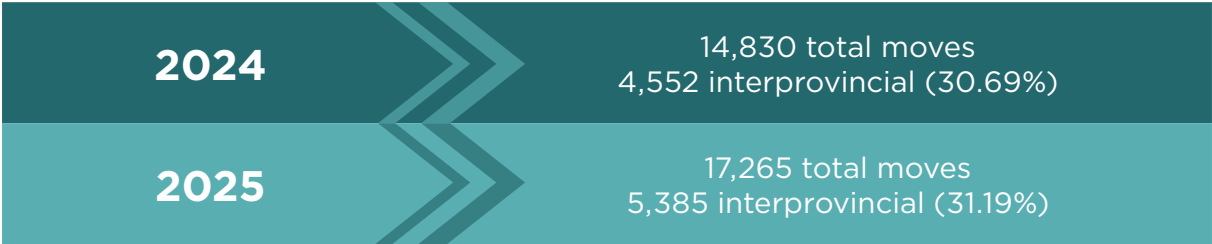
South Africa's Shifting Migration Story

A snapshot of how South Africans are moving, revealing the scale of household relocation and the balance between local and interprovincial movement.

The Shape of Movement in South Africa

Before examining where South Africans are moving to and from, it is helpful to establish the overall scale and structure of household movement captured in this dataset.

The figures below reflect the total number of domestic household moves analysed by Wise Move over a two-year period, distinguishing between intraprovincial moves and interprovincial relocations. At a headline level, the overall split between local and cross-provincial movement changed very little between 2024 and 2025.



Overall, the number of household moves analysed increased by 16.4%. Despite that growth, the balance between intraprovincial and interprovincial movement remained highly consistent, with around 70% of moves taking place within provinces and around 30% crossing provincial boundaries.

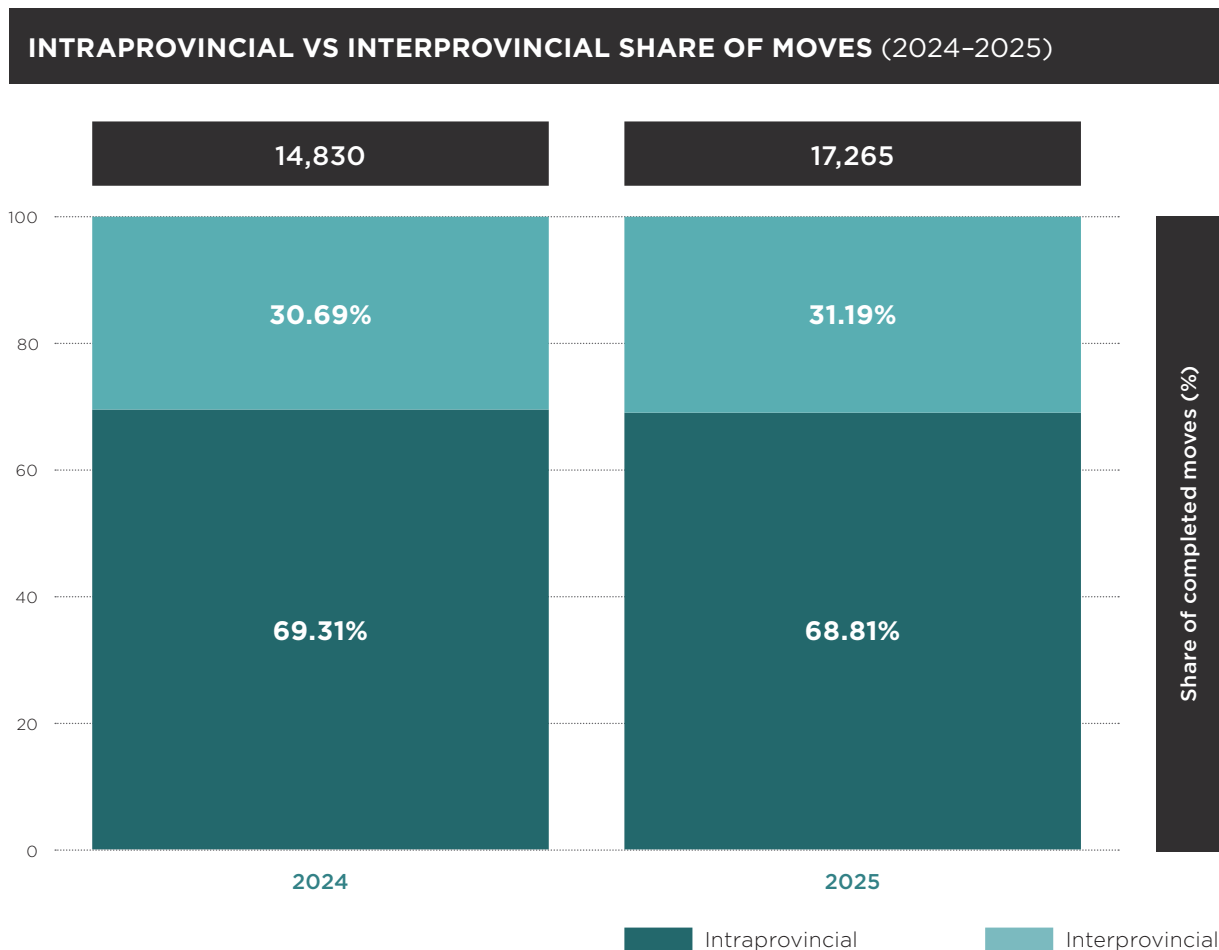
That stability matters because it shows that the most notable changes in 2025 were not in the overall structure of movement, but in the direction of movement itself. The more revealing shifts appeared between specific provinces, cities, and major corridors.

Local Moves Still Drive the Industry

Local movement continues to shape the core of South Africa's moving market with seven out of every ten household relocations take place within provincial borders.

Intraprovincial Moves Dominate

With nearly seven out of every ten relocations occurring within provincial borders, intraprovincial movement forms the structural backbone of South Africa's mobility landscape.



However, local movement is not evenly distributed across the country. Certain provinces account for a disproportionate share of within-province relocations, reflecting differences in population size, economic activity, and housing turnover. The following analysis examines how local movement is concentrated geographically.

RANKED BY 2025 SHARE OF LOCAL MOVES

Province	Share of Local Moves 2024 (%)	Share of Local Moves 2025 (%)	Percentage Point Change
Gauteng	60.28%	62.27%	1.99
Western Cape	29.00%	26.80%	-2.2
Eastern Cape	7.14%	7.75%	0.61
Limpopo	1.99%	1.71%	-0.28
Free State	0.56%	0.64%	0.08
KwaZulu-Natal	0.32%	0.35%	0.03
Mpumalanga	0.44%	0.27%	-0.17
North West	0.18%	0.13%	-0.05
Northern Cape	0.10%	0.08%	-0.02

Local movement remained concentrated in Gauteng and the Western Cape. While the overall pattern changed only modestly year on year, the percentage point (pp) shifts begin to show that momentum in Gauteng and KwaZulu-Natal is strengthening while it eases up in the Western Cape.

It is in interprovincial relocation that these directional shifts become even more visible.

The Interprovincial Migration Shift

Across provincial borders, relocation patterns begin to reveal the shifts reshaping movement between South Africa's major provinces.

Year on Year Shifts in Interprovincial Movement

Interprovincial mobility increased across most major provinces between 2024 and 2025. Total interprovincial moves rose from 4,552 in 2024 to 5,385 in 2025, reflecting a higher level of movement overall.

Gauteng saw its inbound share increase from 25.32% in 2024 to 27.97% in 2025, recording a total gain of 2.65 percentage points, alongside a slight decline in outbound share from 45.45% to 44.99%. While the province remained in a net outflow position, the gap narrowed marginally from -20.13% in 2024 to -17.02% in 2025.

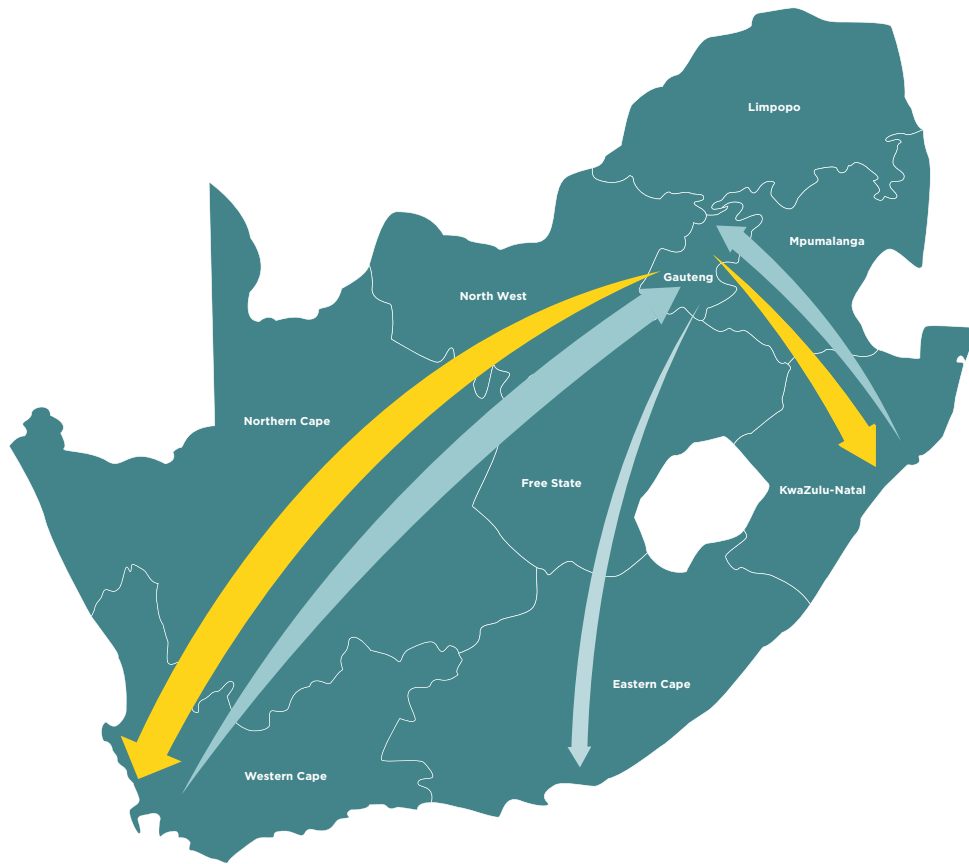
The Western Cape for the same period saw its inbound share decline from 32.42% to 31.03%, while outbound share rose more sharply from 15.10% to 18.73%. As a result, the province's net gain reduced from +17.32% to +12.29% year on year.

KwaZulu-Natal experienced strong growth in both directions, with inbound share rising from 13.49% to 15.66% and outbound share increasing from 13.32% to 15.16%, contributing to a modest improvement in net position.

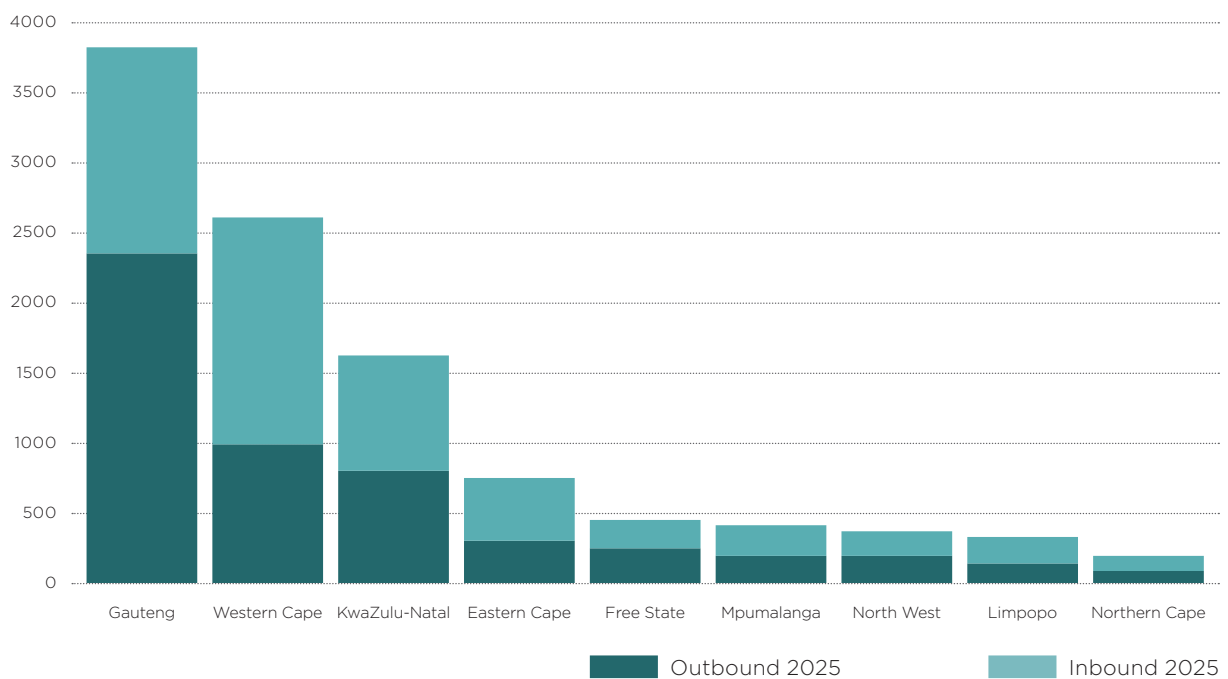
Several smaller provinces also recorded more modest shifts. The Eastern Cape, Mpumalanga, and the Northern Cape strengthened their net positions, while the Free State and North West saw a slight weakening in net position.

Overall, while the structural balance of interprovincial movement remained broadly consistent, the redistribution of shares suggests a strengthening two-way exchange between South Africa's major economic centres. The following section examines these directional movements in greater detail at corridor level.

MOST POPULAR ROUTES



TOTAL MOVES 2025



PERCENTAGE OF 2025 INTERPROVINCIAL MOVES

Route	Percentage
Gauteng → Western Cape	21.96%
Western Cape → Gauteng	10.66%
Gauteng → KwaZulu-Natal	9.98%
KwaZulu-Natal → Gauteng	8.34%
Gauteng → Eastern Cape	4.01%
KwaZulu-Natal → Western Cape	3.95%
Western Cape → KwaZulu-Natal	3.31%
Eastern Cape → Gauteng	2.30%
Gauteng → Mpumalanga	2.22%
Western Cape → Eastern Cape	2.13%
Gauteng → Limpopo	2.05%
Gauteng → North West	2.03%
Gauteng → Free State	2.03%
Eastern Cape → Western Cape	1.73%
Free State → Gauteng	1.71%

Leading Corridors Behind the Change

Beneath the provincial totals, a more revealing story starts to take shape along South Africa's key migration routes.

Corridor-Level Shifts in Interprovincial Movement

Provincial totals show where net positions shifted, but corridor-level analysis shows which routes drove those changes. In 2025, the clearest gains were concentrated on major corridors flowing into Gauteng.

While completed moves on the platform grew by 16% overall between 2024 and 2025, the strongest inbound Gauteng routes grew far faster. Movement from the Western Cape to Gauteng rose by 58.6%, while KwaZulu-Natal to Gauteng increased by 54.0%. Growth in the opposite direction was more moderate, pointing to a stronger pull into Gauteng rather than an evenly balanced exchange between provinces.

The following analysis ranks the leading interprovincial corridors by 2025 volume and compares their growth relative to overall platform growth during the same period.

Corridor	2024	2025	Absolute Change	% Change	Above Platform Growth (pp)*
Gauteng → Western Cape	944	1,154	210	22.30%	6.3
Western Cape → Gauteng	353	560	207	58.60%	42.6
Gauteng → KwaZulu-Natal	394	525	131	33.30%	17.3
KwaZulu-Natal → Gauteng	285	439	154	54.00%	38
Gauteng → Eastern Cape	169	211	42	24.90%	8.9

Corridor-level data indicates a marked acceleration in relocations into Gauteng from other major economic provinces.

Movement from the Western Cape to Gauteng increased 58.6% year on year. Relative to overall platform growth this represents approximately 42 percentage points of corridor-specific acceleration.

Similarly, relocations from KwaZulu-Natal to Gauteng saw 54.0% growth year on year, 38 percentage points above baseline expansion.

By contrast, growth in the opposite direction (Gauteng → Western Cape and Gauteng → KwaZulu-Natal) was more moderate, suggesting a strengthening inbound pull toward Gauteng rather than a purely symmetrical exchange.

Western Cape to Gauteng Reversal

A closer review of the Western Cape–Gauteng corridor suggests that relocations are targeted to specific areas and suburban nodes.

Within the Western Cape, return movement into Gauteng is led primarily by Cape Town-based departures. The strongest origin concentrations appear in the Northern Suburbs and northern growth corridor, including Durbanville, Brackenfell, Burgundy Estate, Kraaifontein, and Bellville. A secondary cluster appears along the Blaauwberg and West Coast strip, including Milnerton and Bloubergstrand, with a growing contribution coming from Hout Bay.

On the Gauteng side, arrivals are concentrated in established economic and residential nodes rather than peripheral areas. The clearest landing points include Bryanston, Morningside, Illovo, Sandown, and Houghton Estate, alongside secondary concentrations in Lone Hill, Ferndale, Brooklyn, and Faerie Glen.

This pattern suggests that return movement is being shaped less by broad perceptions of province-level appeal and more by practical household priorities. Movers appear to be leaving established suburban areas in Cape Town and resettling in well-connected parts of Gauteng with close access to employment, infrastructure, and long-term residential stability.

At suburb level, the Western Cape–Gauteng corridor shows that return movement is focused on Gauteng's main economic nodes rather than dispersed across the province.

KwaZulu-Natal to Gauteng Surge

The strengthening pull into Gauteng is not limited to migration from the Western Cape. As shown, the KwaZulu-Natal–Gauteng corridor also recorded strong year on year growth.

A closer view of this corridor shows that departures are concentrated primarily in the greater eThekweni region rather than being evenly distributed across KwaZulu-Natal. Durban accounted for 11.8% of KwaZulu-Natal–Gauteng bookings in 2025, followed closely by Berea at 11.4%. Secondary origin nodes included eManzimtoti and Ballito, indicating that movement was anchored largely in Durban and its surrounding urban corridor. Within the main origin cities, sublocality patterns such as Morningside and Musgrave in Berea, and Reservoir Hills and Sherwood in Durban, suggest that relocations were concentrated in established residential areas.

On the Gauteng side, arrivals were similarly focused. Sandton accounted for 18.0% of destination bookings by Pretoria at 12.8%, Randburg at 11.8%, Johannesburg at 10.0%, and Midrand at 9.7%. Taken together, this points to a clear concentration in North Johannesburg and the Pretoria corridor. Within these destination nodes, sublocality patterns such as Bryanston, Sunninghill, and Fourways in Sandton, and Queenswood in Pretoria, reinforce the view that movers were targeting established, well-connected urban areas.

Where Gauteng Migrants Are Relocating

When Gauteng residents move over provincial borders, destination choices remain highly concentrated.

In 2025, 48.82% of Gauteng's interprovincial outflow was directed to the Western Cape, reinforcing Cape Town's position as the country's single largest external draw. KwaZulu-Natal accounted for 22.17% of Gauteng-origin moves, followed by the Eastern Cape at 8.91%, with the remaining flow split across Mpumalanga at 4.94%, Limpopo at 4.56%, and both the Free State and North West at 4.52%.

In the Western Cape, landings cluster in Cape Town's northern suburbs and the Helderberg, rather than in inner-city areas. In KwaZulu-Natal, movement centres on Durban's established suburbs and the north-coast corridor, including Ballito and Umdloti. In the Eastern Cape, coastal urban nodes such as Gqeberha and Jeffreys Bay feature prominently. These are not marginal destinations. They are areas with existing infrastructure, established communities, and relatively predictable, and still somewhat affordable, housing markets.

Secondary Destinations Still Hold Appeal

While the largest share of interprovincial movement remains concentrated on the main Gauteng-Western Cape and Gauteng-KwaZulu-Natal routes, smaller destination patterns still show where semigration continues to hold. Outside the major corridors, movers remained drawn to selected coastal regions, although that appeal was uneven rather than broad-based.

A more selective coastal pull

Among the smaller coastal destinations analysed, the Durban South Coast showed the clearest increase in activity between 2024 and 2025. Its inbound share rose from 0.78% to 0.93% of total moves. However, its outbound share also increased from 0.44% to 0.65%. This suggests that movement in and out of the region became more active overall, rather than the South Coast simply acting as a one-way destination.

The Garden Route remained comparatively steady. Its inbound share saw no increase and remained steady at 1.24%, while outbound share edged up only slightly from 0.33% to 0.35%. This points to continued appeal, but not the kind of acceleration seen in upcoming coastal areas.

By contrast, the West Coast softened. It was the only one of the three coastal regions analysed to record a year on year decline in both inbound and outbound share, with inbound movement falling from 0.63% to 0.49% and outbound movement declining from 0.27% to 0.22%. This suggests that earlier momentum in the region may be easing.

Housing Signals Along Key Migration Routes

Beneath the raw data lies a more practical question: are households improving their position, holding steady, or making trade-offs?

Housing: What Movers Gained or Gave Up

Migration patterns are often interpreted as lifestyle choices, but housing outcomes reveal a more practical layer of decision-making.

Looking at how home size changes during a move helps clarify whether households are consolidating, holding position, or improving their housing situation. Across the Western Cape ↔ Gauteng corridor, the 2025 data suggests that movement is not primarily associated with downsizing, particularly among return movers.

Western Cape → Gauteng: Stability with a bias towards trading up

Among households moving from the Western Cape to Gauteng in 2025, 52.98% maintained the same home size. A further 37.78% moved into a larger home, while only 9.24% moved into a smaller one. This is consistent with recent property data showing a wider affordability gap between the Western Cape and Gauteng, with the Western Cape recording stronger house price growth and higher average purchase prices.

Gauteng → Western Cape: Holding steady, with more downsizing

Among households moving from Gauteng to the Western Cape in 2025, 59.49% maintained the same home size. However, compared with movers in the opposite direction, downsizing was more common and trading up less so: only 25.55% moved into a larger home, while 14.97% moved into a smaller space.

Taken together, the housing data shows a clear contrast. Movers heading to Gauteng were more likely to maintain or increase home size, while those moving to the Western Cape were more inclined to downsize. This suggests that housing affordability remains an important part of the migration story.

The Cost and Labour Profile of Household Movement

Housing outcomes show how households are repositioning themselves, but each relocation also has a clear operational profile. Moving home is not only a housing decision. It is also a priced logistical event that requires labour, vehicle capacity, and coordination.

The cost profile of moves in 2025 was concentrated in the middle of the market. Only 3.4% of moves were priced at R5,000 or less, while 22.4% fell between R5,001 and R10,000. The largest share, 42.3%, fell between R10,001 and R20,000, followed by 30.2% between R20,001 and R50,000. Only 1.6% of moves exceeded R50,000.

Labour demand was concentrated in multi-person jobs. While around 10.3% of moves required just one worker, the majority of moves (89.7%) required 2-4 or more people to get the job done.

This is important because it shows that household relocation is not a low-labour service. Most moves create work for teams rather than individuals, linking residential mobility directly to employment demand in transport and logistics. As movement volumes increase, that labour requirement scales with them.

Team size per move	Share of moves
1 person needed	10.3%
2 people needed	37.4%
3 people needed	30.9%
4+ people needed	21.5%

That makes household migration economically significant not only because of what people pay for a move, but because of the number of workers needed to complete it.

Movement, Momentum, and Migration

Migration's Economic Footprint

Every move holds an economic opportunity that helps shape a nation in motion.

Movement as an Economic Engine

Migration does not only move households, it also creates repeat demand for transport, labour, storage, packing, and other logistics services. As those movement patterns become more recurring, the economic activity around them becomes more sustained.

According to Statistics South Africa's Quarterly Labour Force Survey, employment in the transport sector reached approximately 1.12 million in Quarter 2 of 2025, up by 51,000 year on year. Of these, 732,000 worked in the formal sector and 384,000 in the informal sector.

At the industry level, Stats SA's Transport and Storage Industry 2023 Report showed that VAT-registered enterprises in the sector generated R717.0 billion in income in 2023, up from R543.6 billion in 2019.

This growth occurred during a period in which total employment across the economy declined, positioning transport among the stronger-performing sectors in a weaker labour market.

Estimating the size of South Africa's moving industry

Using Wise Move's platform data as a benchmark, South Africa's household moving market is estimated to comprise roughly 5,000 to 6,000 active small and medium-sized moving businesses. This points to a large but highly fragmented market, with a long tail of operators serving residential demand across the country.

From Fragmentation to Opportunity

A fragmented market is not necessarily a weak one, but it is often inefficient. In South Africa's moving industry, demand is spread unevenly across routes, dates, and operators, resulting in under-utilised fleets, inconsistent workloads, and heavy reliance on informal referral networks.

As migration becomes more circular and geographically dispersed, utilisation becomes more important than simple expansion. Repeating corridors, return routes, and recurring residential churn create demand that many operators struggle to capture independently. In this context, aggregation, visibility, and more structured participation can improve efficiency across a fragmented operator base.

More Than Movement: A Signal of Change

South Africans are telling a story in every move, how we prepare for that story is up to us.

What Our Movement Reveals About South Africa

South Africa's migration story is no longer defined by a simple one-way semigration narrative.

Instead, the data points to a more fluid cycle of movement, in which households are relocating, reassessing, and often moving again as work, affordability, housing trade-offs, and life stage continue to shift. Gauteng is drawing more movers back, even as coastal regions and secondary destinations retain their appeal, suggesting that movement is becoming less about permanent exits and more about ongoing recalibration.

That shift matters because migration is not only about where people choose to live. It is also about how households respond when the balance between cost, opportunity, stability, and long-term practicality begins to change. The routes people take, the homes they choose, and the places they return to offer a real-time view of how South Africans are adapting to economic pressure and possibility.

The significance of this movement extends well beyond households themselves. Every relocation activates demand across transport, labour, storage, logistics, and related local services. Moves create work, generate income, and connect personal decisions to broader patterns of business activity and economic circulation across the country.

This is where Wise Move's role becomes especially important. Positioned at the point where household decisions become real economic activity, Wise Move has a unique view of how South Africans are moving and what those patterns reveal. More than a record of relocation, this data offers a live picture of a country adjusting in motion, and of the businesses, workers, and opportunities that move with it.

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