South Africa
Inspiring new ways

APR - JUN
2024

2ND QUARTER PERFORMANCE REPORT

DOMESTIC

TOURISM

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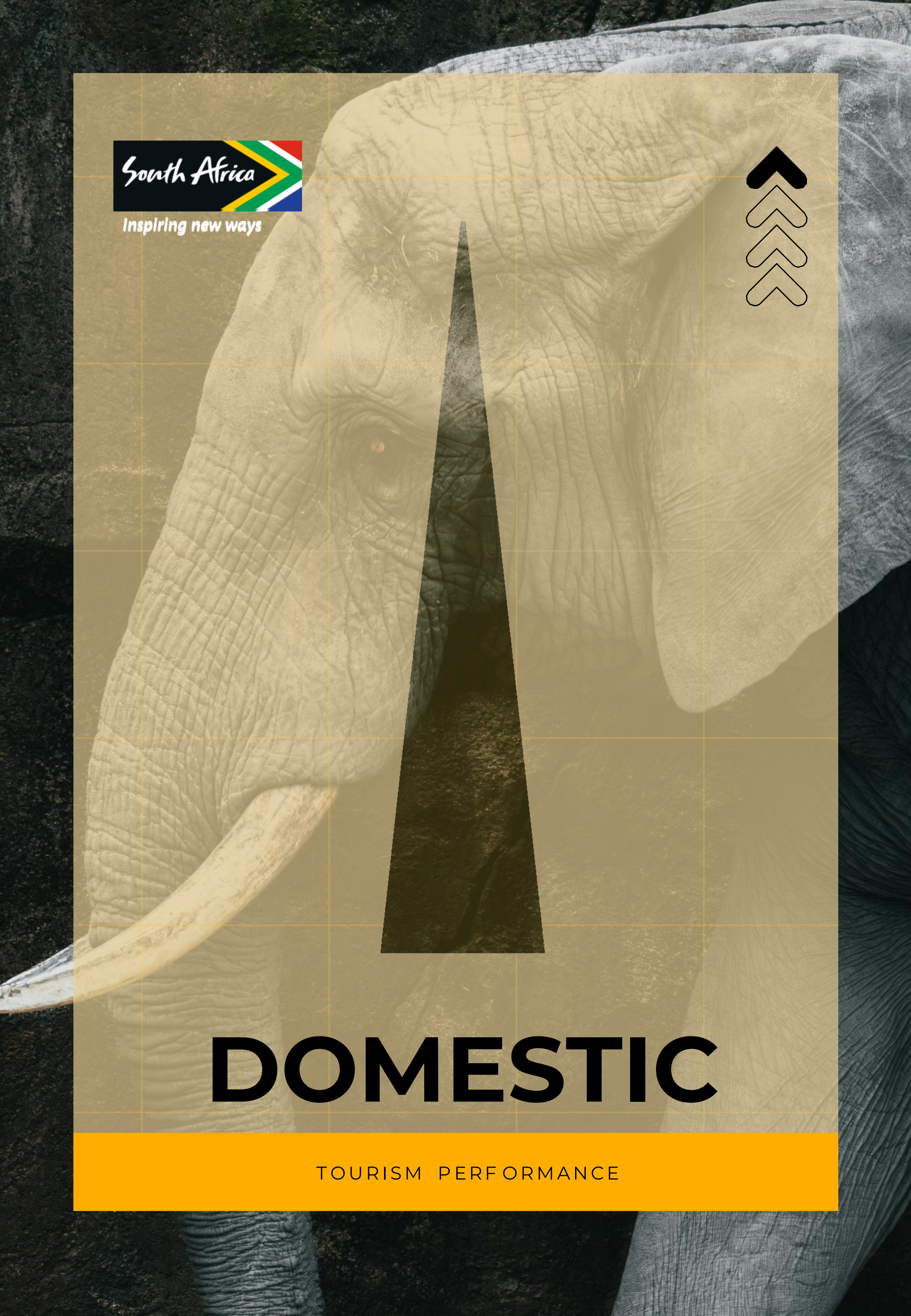


DOMESTIC

TOURISM PERFORMANCE

EXECUTIVE SUMMARY

- Domestic trips dropped to 9.2 million (-7.9% compared to Q2 2024), bringing the number of domestic overnight trips in line with Q2 2022.

- In Q2 2024, the largest drop came from the VFR sector, while holiday trips experienced strong growth. The VFR share of total trips dropped to 40.7% against the previous year. Meanwhile, the holiday sector's share of total trips increased from 27.6% in Q2 2023 to 33.9% in Q2 2024. The MICE sector, while smaller demonstrated strong growth in spending per trip.

- In Q2 2024, total overnight spend growth was relatively flat plateauing at ZAR 29.8 billion. Total spend grew in both the holiday and MICE sectors, with a particularly strong increase in the MICE sector reaching ZAR 1.5 billion. The VFR sector, however, has seen a drop of -9.4% in total spending.

- The average overnight spend increased by 11.4% this quarter (vs. Q2 2023) reaching ZAR 3 220. A divergence between sectors is noted this quarter with VFR and MICE travellers spending significantly more per trip, while holidaymakers are spending slightly less on average.

- This quarter, y.o.y bed nights dropped slightly to 36.4 million from 37.8 million. On the other hand, the average length of stay noted a modest increase of +4.5%, rising from an average of 3.8 nights in Q2 2023 to 3.9 nights in Q2 2024.

- Holidaymakers drove the increase in bed nights, while VFR and MICE sectors experienced declines in this area. Travelers tended to stay longer for holidays and MICE activities, with notable growth in the average length of stay for both sectors, while VFR stays shortened slightly.

- Gauteng as a main destination recorded the highest number of overnight trips at 2.1 million with an impressive overnight spend of ZAR 5.9 billion, the second highest in the country. The average spend per trip was ZAR 2 820, and bed nights reached 11.2 million, with an average stay of 5.3 nights.

- Limpopo as a main destination recorded 1.4 million overnight trips, with an overnight spend of ZAR 4.7 billion. The average spend per trip was ZAR 3 490. Bed nights were 3.7 million, and the average stay was 2.7 nights.

- Eastern Cape as a main destination noted 1.2 million overnight trips, resulting in an overnight spend of ZAR 2.1 billion. The province accounted for 4.2 million bed nights. The average spend per trip was the lowest across the country at ZAR 1 740, despite the moderate length of stay of 3.6 nights.

- KwaZulu-Natal as a main destination reported 1.0 million overnight trips, with an overnight spend of ZAR 6.3 billion. The average spend per trip reached ZAR 6 040, the highest across all provinces. Bed nights were 3.7 million, with an average stay of 3.5 nights.

- North West as a main destination noted 0.9 million overnight trips, with an overnight spend of ZAR 1.7 billion. The average spend per trip was ZAR 1 820, the second lowest among the provinces. Bed nights were 6.2 million, and the average stay was the longest at 6.7 nights.

- Free State as a main destination reached 0.9 million overnight trips, generating an overnight spend of ZAR 2.4 billion. The average spend per trip was ZAR 2 630. Bed nights totalled 2.9 million, with an average stay of 3.2 nights.

- Mpumalanga as a main destination saw 0.9 million trips, generating an overnight spend of ZAR 3.0 billion. The average spend per trip was ZAR 3 470. Bed nights were 1.8 million, with an average stay of 2.1 nights.

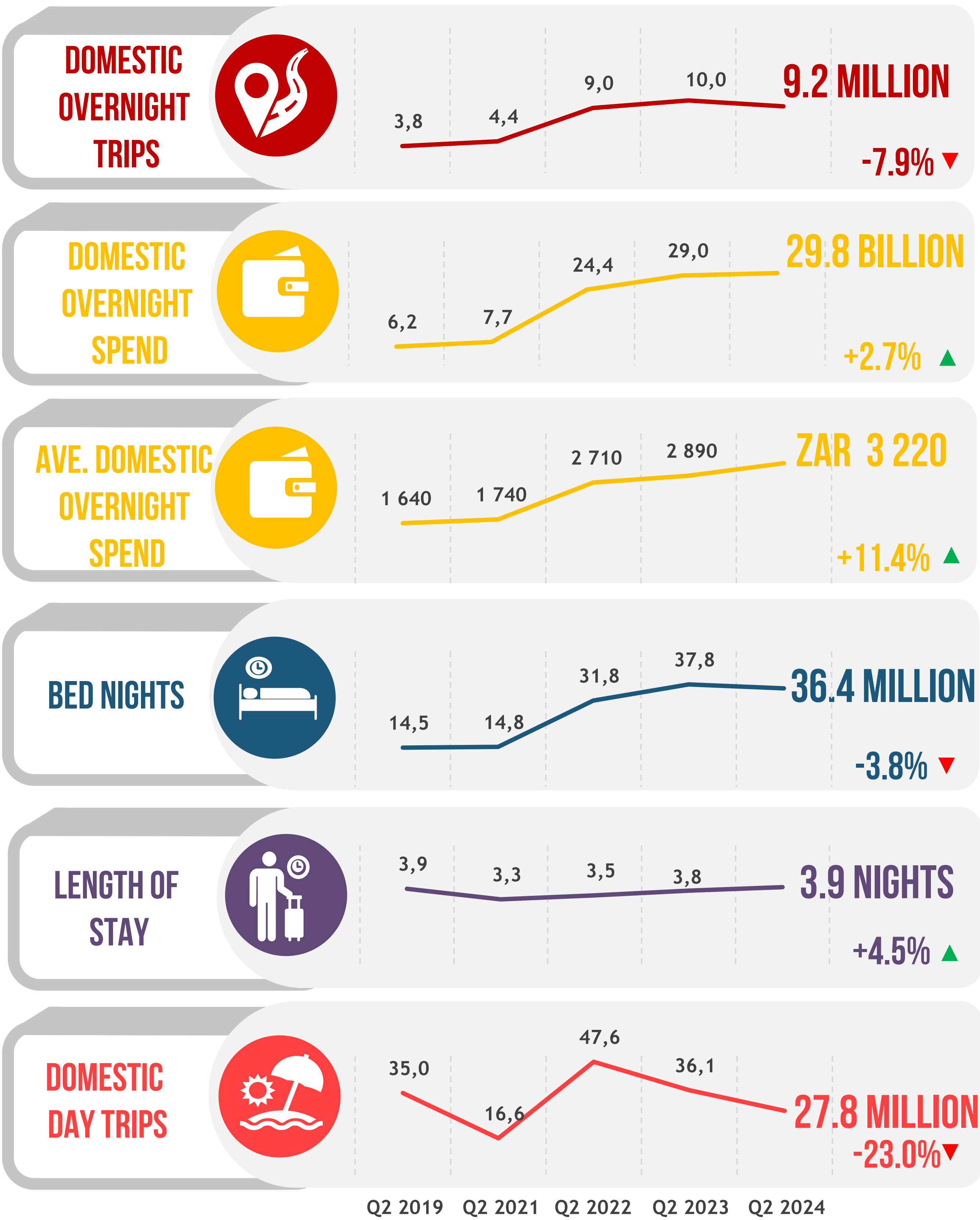
- Western Cape as a main destination recorded 0.7 million trips, generating an overnight spend of ZAR 3.3 billion. The average spend per trip was ZAR 4 890, the second highest in the country. Bed nights were 2.4 million, with an average stay of 3.5 nights.

EXECUTIVE SUMMARY (CONTINUED)

- Northern Cape as a main destination had the fewest trips at 0.2 million, with an overnight spend of ZAR 0.3 billion. The average spend per trip was ZAR 1 900. Bed nights were minimal at 0.3 million, with an average stay of 2.3 nights.
- This quarter, domestic tourists declined to a total of 8.8 million tourists. The average number of trips per domestic tourist remained stable at 1.1.
- In Q2 2024, the leading cause for not traveling is due to financial constraints. Financial reasons, no reason to travel, and time constraints made up 73.6% of the reasons for not traveling in Q2 2024.
- The total number of Domestic day trips experienced a decline of -23.0% against Q2 2023, totaling 27.8 million domestic day trips in Q2 2024
- Day trip total spend levels increased by +12.5% against Q2 2023 reaching a total of ZAR 37.7 billion for Q2 2024.
- This quarter, Limpopo was the highest source province for domestic day trips as well as being the key main destination for day trips, reaching a total of 6.4 million day trip visits.

KEY DOMESTIC TOURISM INDICATORS

Key growth and change rates shown in this report are in comparison to 2023.



OBJECTIVES

OBJECTIVES OF THE SURVEY

South Africa Tourism (SAT) commissioned this monthly survey in 2007 to understand and gain vital information on domestic overnight travel and day trips. Several enhancements and improvements have been introduced over time in collaboration with South Africa Tourism (SAT).

Domestic Tourism Survey (DTS) is a large-scale household survey aimed at collecting accurate statistics on the travel behaviour and expenditures of South African residents travelling within the country. Such information is crucial when determining the contribution of tourism to the South African economy and helps with planning, marketing, policy formulation, and regulation of tourism-related activities.

The key objective of the DTS is to understand domestic travel behaviour of an average South African resident. Hence, this would include collecting information on:

- Domestic day and overnight trips undertaken;
- Trips undertaken by respondents and trips by other household members without the respondent accompanying them;
- Profile of the most recent day/overnight domestic trips undertaken both by the respondent and other household members (detailing information on destination, trip length, purpose of visit, accommodation, transport, activities, trip expenditure, etc.); and
- Socio-demographics.

DEFINITIONS

DEFINITIONS

- ***Domestic Overnight Trips:*** Domestic trips where tourists spend at least one night away from their usual place of residence, which are at least 40km, one way, but visited less frequently than once a week (unless for leisure purposes). These trips must not have been for relocation and remuneration purposes.
- ***Domestic Overnight Spend:*** The total amount of money during an overnight stay at a destination, including accommodation, food, transportation, and activities.
- ***Average Spend:*** The average spend refers to the mean amount of money spent by a specific group of individuals over a set period. For domestic tourism, it would be the total amount of money spent by all domestic tourists, divided by the number of trips.
- ***Domestic Day Trips:*** Domestic trips outside of the tourist's usual environment, which are at least 40km, one way, but visited less frequently than once a week (unless for leisure purposes). These trips must not have been for relocation and remuneration purposes, and the tourist returns to their place of residence on the same day.
- ***Domestic Day Spend:*** The total amount of money spent by domestic tourists during a day trip, including expenditures on transportation, food, and activities.
- ***Domestic Tourists:*** Residents of a country who travel to and stay in places within their own country for leisure, business, or other purposes.
- ***Geographic Spread:*** Domestic tourists' distribution and movement patterns across different regions or provinces within a country.
- ***Bednights:*** The total number of nights spent in accommodation by domestic tourists.
- ***Length of Stay:*** The number of nights a domestic tourist spends at a destination during their trip.
- ***Main Destination Province:*** A tourism trip's main destination province is the place visited that is central to the decision to take the trip.
- ***Origin Province:*** The province or region where domestic tourists reside before embarking on their trip.
- ***Main purpose of the trip:*** This is the purpose in the absence of which the trip would not have been taken.
- ***Business Travel/MICE trips:*** Domestic trips undertaken primarily for work-related purposes, including meetings, conferences, and business exhibitions.
- ***VFR (Visiting Friends and Relatives):*** Domestic trips undertaken primarily to visit friends or family, rather than for leisure, business, or other reasons.
- ***Holiday/Leisure Trips:*** Domestic trips undertaken primarily for leisure or vacation purposes, excluding trips for business or other reasons.

ABOUT THE REPORT

DOMESTIC TOURISM STATISTICS

South African Tourism's Domestic Survey is conducted through in-home face-to-face interviews – the most feasible interview approach for this type of study, in order to ensure high data quality. The sample is designed as a multi-stage, stratified sample of n=1 300 per month. The sampling framework is built from geographic strata based on enumerator areas (EAs) used as primary sampling units (PSUs), and households, used as the secondary sampling units (SSUs). In each EA drawn, four households are systematically selected with an equal selection probability. However, the EAs are disproportionally allocated to the main strata in order to ensure sufficient representation of domestic tourism from smaller provinces. The sample design ensures all stratification variables such as province, metro, urban, rural, race, age, and gender are covered. The domestic survey has a margin of error of 2.7% at a confidence level of 95% for the monthly sample. Results are weighted based on Stats SA's mid-year population estimates of SA residents aged 18 and above, and as such, the sample is representative of SA's adult population.

Due to the Covid-19 pandemic, surveying in-home face-to-face became impossible and the survey was halted at the end of February 2020. The survey was renewed in July 2020 (for March travel). Since then, quotas have been achieved in full, although this has not been without difficulty. Interviewers received special training on how to overcome respondent fears; laminated cards were produced and sanitized in front of the respondents; interviews were conducted outside the house gates; interviewers were instructed to keep face masks and shields on at all times except for a few seconds of introduction and identification; and lastly, interviewers used only private transport.

ABOUT THE REPORT

ADDITIONAL SOURCES USED IN THIS REPORT:

1. P0141 - Consumer Price Index (CPI), July 2024
2. P0141 - Consumer Price Index (CPI), June 2024
3. P0141 - Consumer Price Index (CPI), May 2024
4. P6410 - Tourist accommodation, June 2024
5. P6410 - Tourist accommodation, May 2024
6. P0441 - Gross Domestic Product (GDP), 1st Quarter 2024
7. P0441 - Gross Domestic Product (GDP), 2nd Quarter 2024
8. Botswana Air Access project takes flight
9. https://www.tourismupdate.co.za/article/domestic-travel-key-insights-achieving-industry-success

ABOUT THE REPORT

DISCLAIMER

SA Tourism's Analytics and Insights Unit makes every effort to publish reports that are error-free. However, with the large number of complex records that are analyzed, we cannot guarantee that all reports are totally free of error. All errors that are detected are immediately corrected and the latest version of the report is always made available on www.southafrica.net/research.

To access this report online please visit the research section on the South Africa Tourism website at www.southafrica.net/research or for more information e-mail: research@southafrica.net.

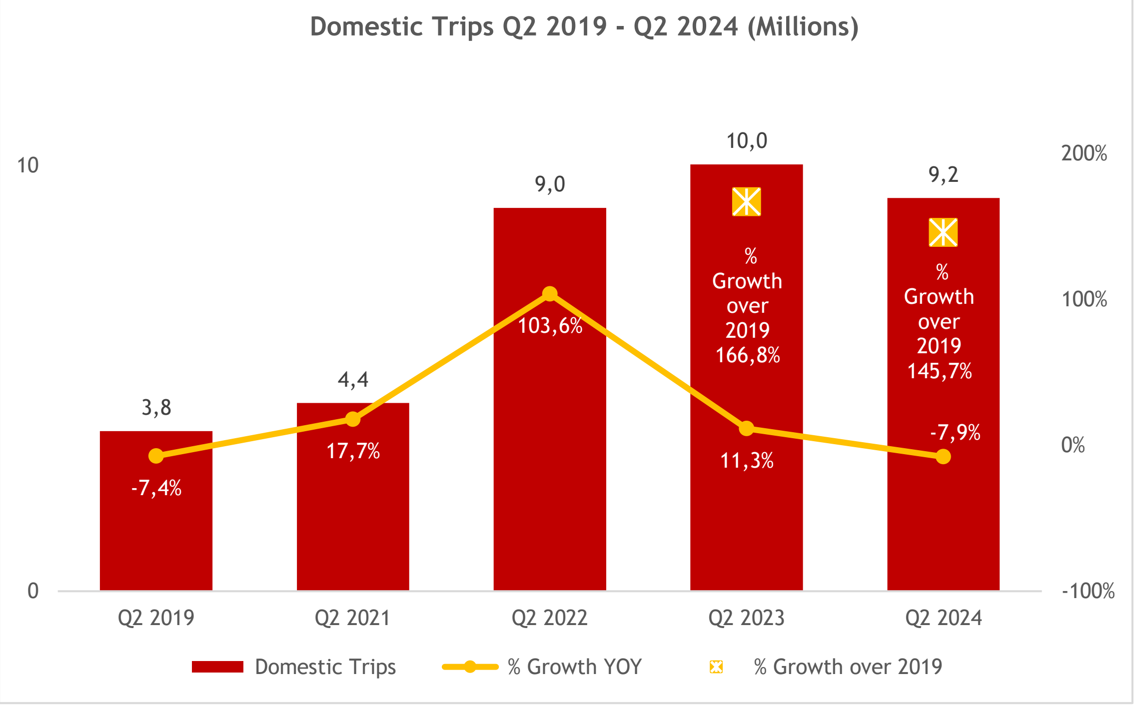
OVERNIGHT TRIPS

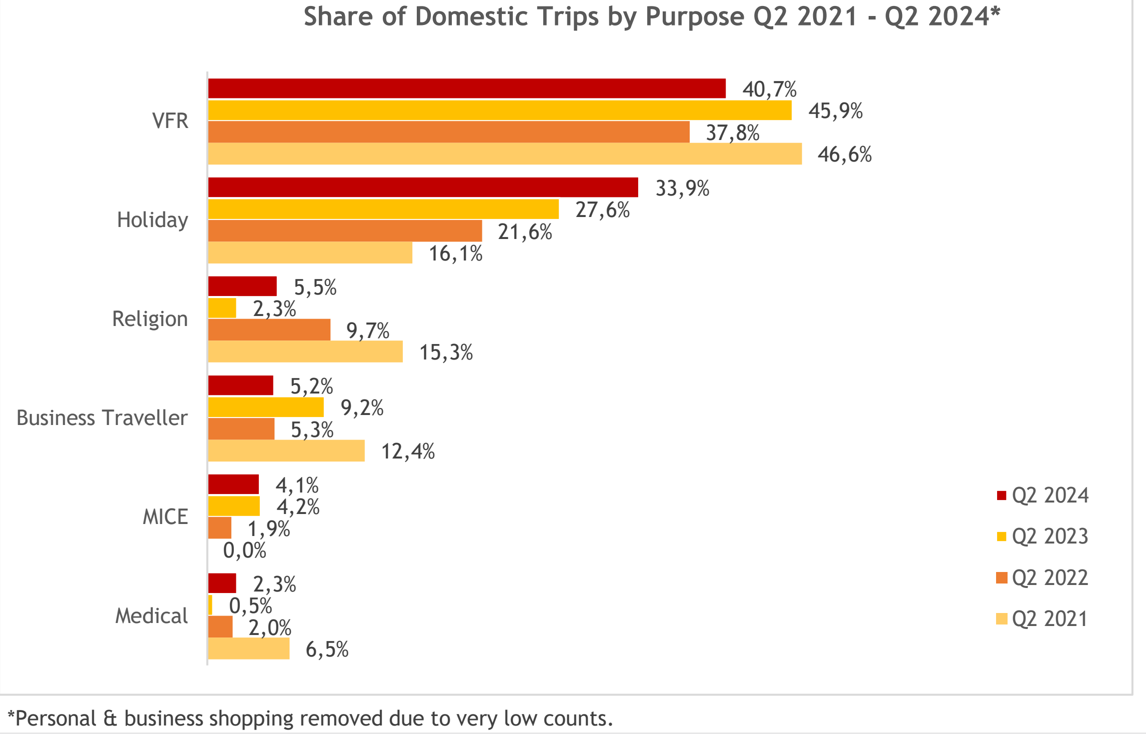
DOMESTIC

DOMESTIC OVERNIGHT TRIPS

9.2 MILLION **-7.9%** ▼

In Q2 2024, the total number of domestic trips declined to 9.2 million (-7.9% compared to Q2 2023), which had seen an increase of +11.3. This brings the total domestic overnight trips back in line with Q2 2022 figures. A notable drop occurred in the VFR sector accounting for 40.7% share of overnight trips. Meanwhile, holiday trips grew steadily year-on-year, showing a positive trend in leisure travel. The share of holiday trips reached 33.9% this quarter, only -6.8 percentage points below the Q2 2024 VFR share.





*Personal & business shopping removed due to very low counts.

DOMESTIC OVERNIGHT TRIPS

9.2 MILLION -7.9%

VFR

3.8 million

ZAR 9.4 bn

R 2 500

16.6 m

4.4

40.7% -18.3%

HOLIDAY

3.1 million

ZAR 14.0 bn

R 4 460

12.1 m

3.9

33.9% +12.9%

MICE

0.4 million

ZAR 1.5 bn

R 3 890

1.4 m

3.7

4.1% -9.5%

- The **VFR sector** experienced notable **declines** across total trips, spend, bed nights, and length of stay. Despite fewer trips, the average spend per trip increased. This could suggest increased costs or more affluent travellers. Overall, the **VFR share** of total trips decreased from 45.9% in Q2 2023 to **40.7%** in Q2 2024.
- The number of **VFR trips declined** by -18.3% to 3.8 million in Q2 2024 compared to Q2 2023.
- VFR **total spend decreased** by -9.4% resulting in a total spend of ZAR **9.4 billion** in the VFR sector.
- The average spend per trip increased by +11.1% marking the average spend per visitor to ZAR 2 500.
- Total **bed nights** for VFR dropped to 16.6 million, a -22.4% **decline** against Q2 2023. The length of stay also decreased this quarter by -5.0% to an average of 4.4 nights.

- The **holiday sector performed well** in Q2 2024, with increases in both total trips and bed nights. The growth in length of stay and total spend pointed to a shift towards longer and possibly more budget-conscious holiday trips. The holiday sector's **share of total trips increased** from 27.6% in Q2 2023 to **33.9%** in Q2 2024.
- **Holiday trips** increased by +12.9% to **3.1 million** against the previous year.
- Total **spend for Holiday trips increased** by +7.6% to ZAR **14.0 billion,** while the **average spend** per trip dropped by -4.7% to **ZAR 4 460** per trip.
- **Bed nights increased** by +41.8% to **12.1 million** and the **length of stay** extended from 3.1 to **3.9 nights**, a +25.6% growth compared to the previous year.

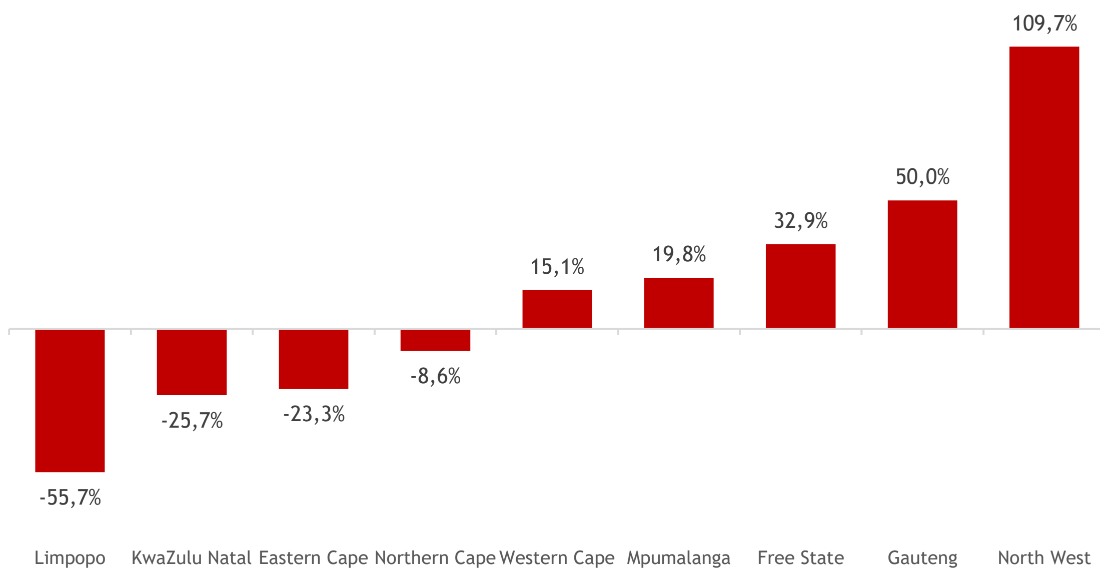
- The **MICE sector**, while smaller in terms of total trips and bed nights, showed **strong growth in spending per trip.** The rise in average spend and total spend points to high-value MICE trips taking place, even as the total number of trips declined. MICE accounted for **4.1% of total domestic trips** in Q2 2024.
- **MICE trips dipped** slightly by -9.5% to **0.4 million** in Q2 2024 compared to Q2 2023.
- **Total spend** and **average spend increased** dramatically by +159.3% to **ZAR 1.5 billion** and by +186.0% reaching **ZAR 3 890.**
- **Bed Nights** remained stable at **1.4 million** with a slight increase of +8.6% against Q2 2023, resulting in an average **length of stay of 3.7 nights**.

DOMESTIC OVERNIGHT TRIPS

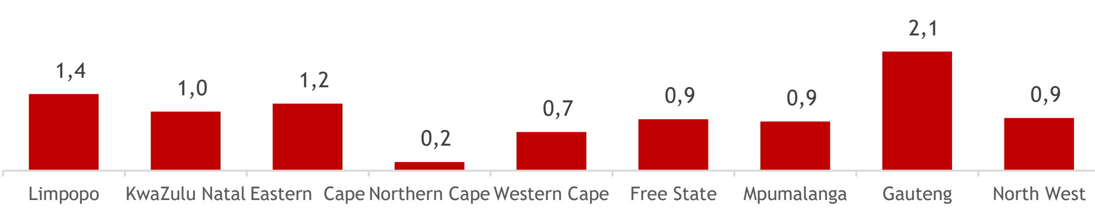
9.2 MILLION **-7.9%** ▼

In Q2 2024, four provinces noted declines as main destinations when compared to last year. Limpopo was the most affected province dropping -55.7%, followed by KwaZulu-Natal and Eastern Cape dropping by -25.7% and -23.3%, respectively and finally the Northen Cape whose drop was minor at -8.6%. This quarter, the North West experienced strong growth as a main destination, increasing by +109.7% reaching 0.9 million trips, reaching similar levels in the number of trips as the Mpumalanga and Free State provinces. Other provinces to witness an upward trajectory were Gauteng, Free State, Mpumalanga and the Western Cape with increases of +50.0%, +32.9%, +19.8%, and +15.1%, respectively.

Main Destination Province Growth Rate Q2 2024 vs. Q2 2023



No. of Trips to Main Destination Province Q2 2024 (Millions)

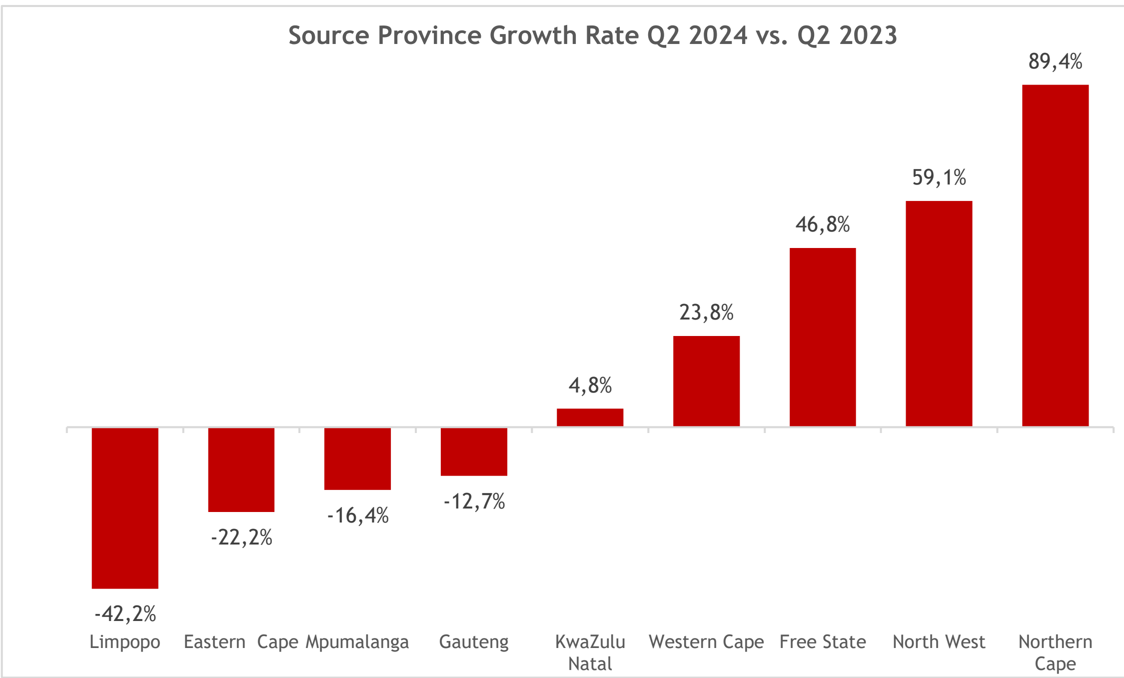


No. of Trips to Main Destination Province Q2 2022 - Q2 2024

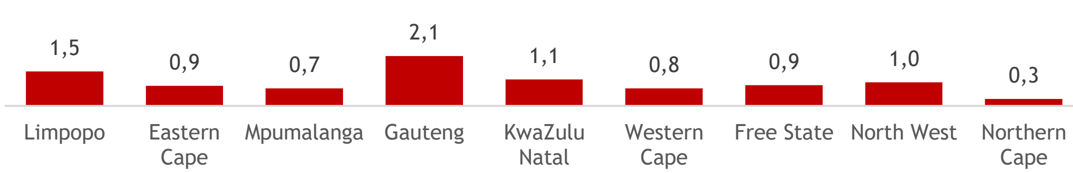
No. of Trips to Destination	Limpopo	KwaZulu-Natal	Eastern Cape	Northern Cape	Western Cape	Free State	Mpumalanga	Gauteng	North West
Q2 2022	1 804 781	1 835 493	1 835 392	119 211	475 305	650 557	525 954	1 308 719	448 984
Q2 2023	3 055 162	1 406 441	1 549 840	165 950	591 646	685 916	725 218	1 401 955	443 778
Q2 2024	1 352 676	1 044 590	1 188 309	151 654	681 037	911 777	868 995	2 103 093	930 669

DOMESTIC OVERNIGHT TRIPS **9.2 MILLION** **-7.9%**

Compared to last year, Limpopo province experienced the steepest decline in the country as a source province with a decrease of -42.2%. Despite this decline, it remains the second-largest source province in Q2 2024. Similarly, the Eastern Cape, Mpumalanga and Gauteng provinces experienced declines of -22.2%, -16.4% and -12.7% respectively against Q2 2023. The Northern Cape led with a substantial increase, boasting the highest source province growth rate of +89.4%, a formidable leap compared to Q2 2024. The North West, Free State, and Western Cape also grew, registering increases of +59.1%, +46.8%, and +23.8%, respectively, against the same period in 2023. KwaZulu-Natal's growth rate remained relatively stable, increasing marginally by +4.8%. Gauteng remained the largest source province for overnight trips, totaling 2.1 million.



No. Trips from Source Province Q2 2024 (Millions)



No. of Trips from Source Province Q2 2022 - Q2 2024

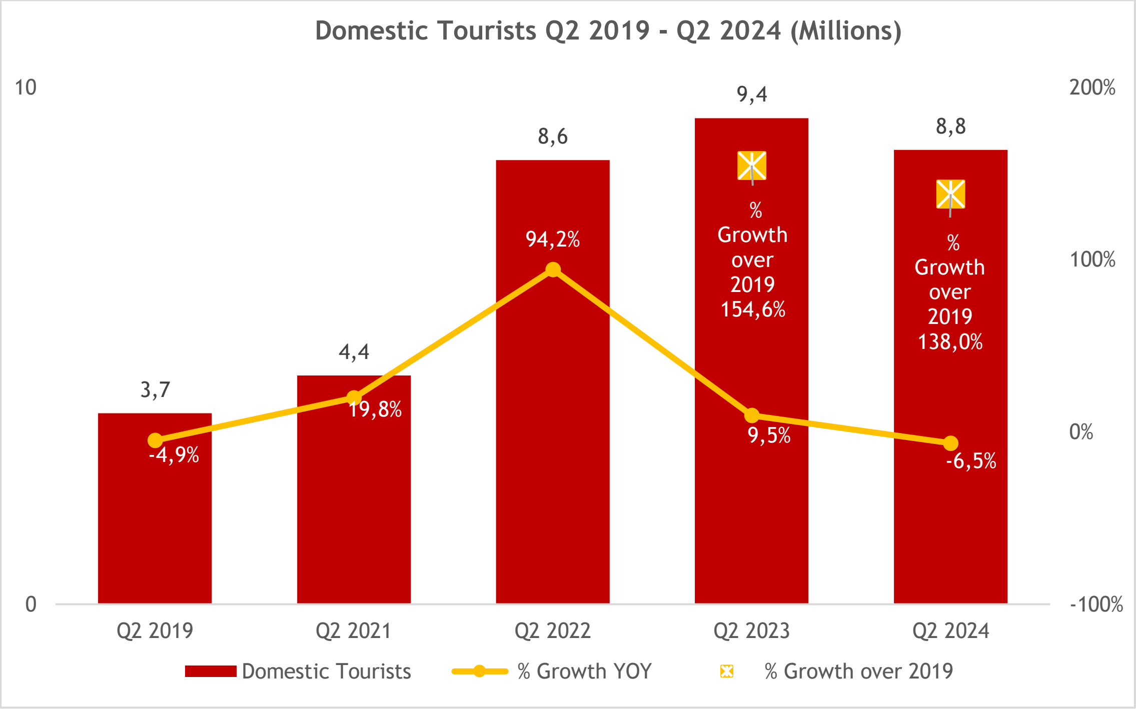
No. of Trips from Source	Limpopo	Eastern Cape	Mpumalanga	Gauteng	KwaZulu Natal	Western Cape	Free State	North West	Northern Cape
Q2 2022	2 302 781	1 715 680	378 334	1 021 076	1 736 341	776 229	545 911	392 422	135 622
Q1 2023	2 546 364	1 099 481	891 018	2 427 414	1 077 269	607 511	601 700	631 191	143 956
Q1 2024	1 472 444	855 906	744 933	2 118 366	1 129 193	752 018	883 141	1 004 117	272 683

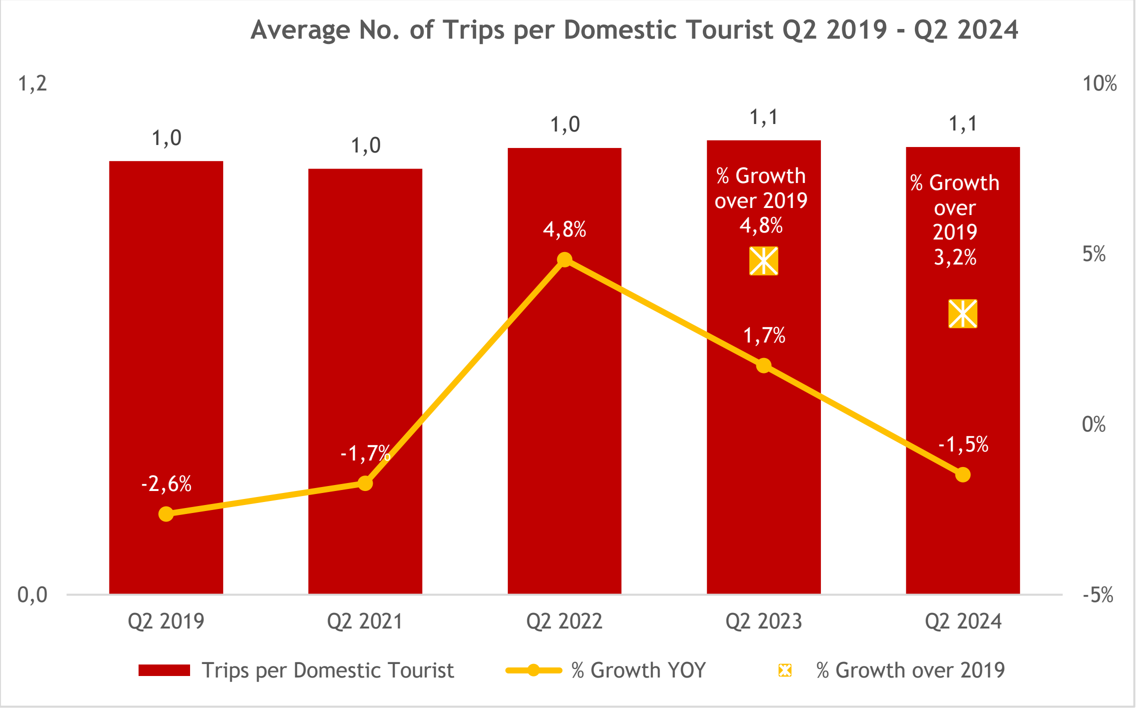
DOMESTIC OVERNIGHT TRIPS

9.2 MILLION

-7.9% ▼

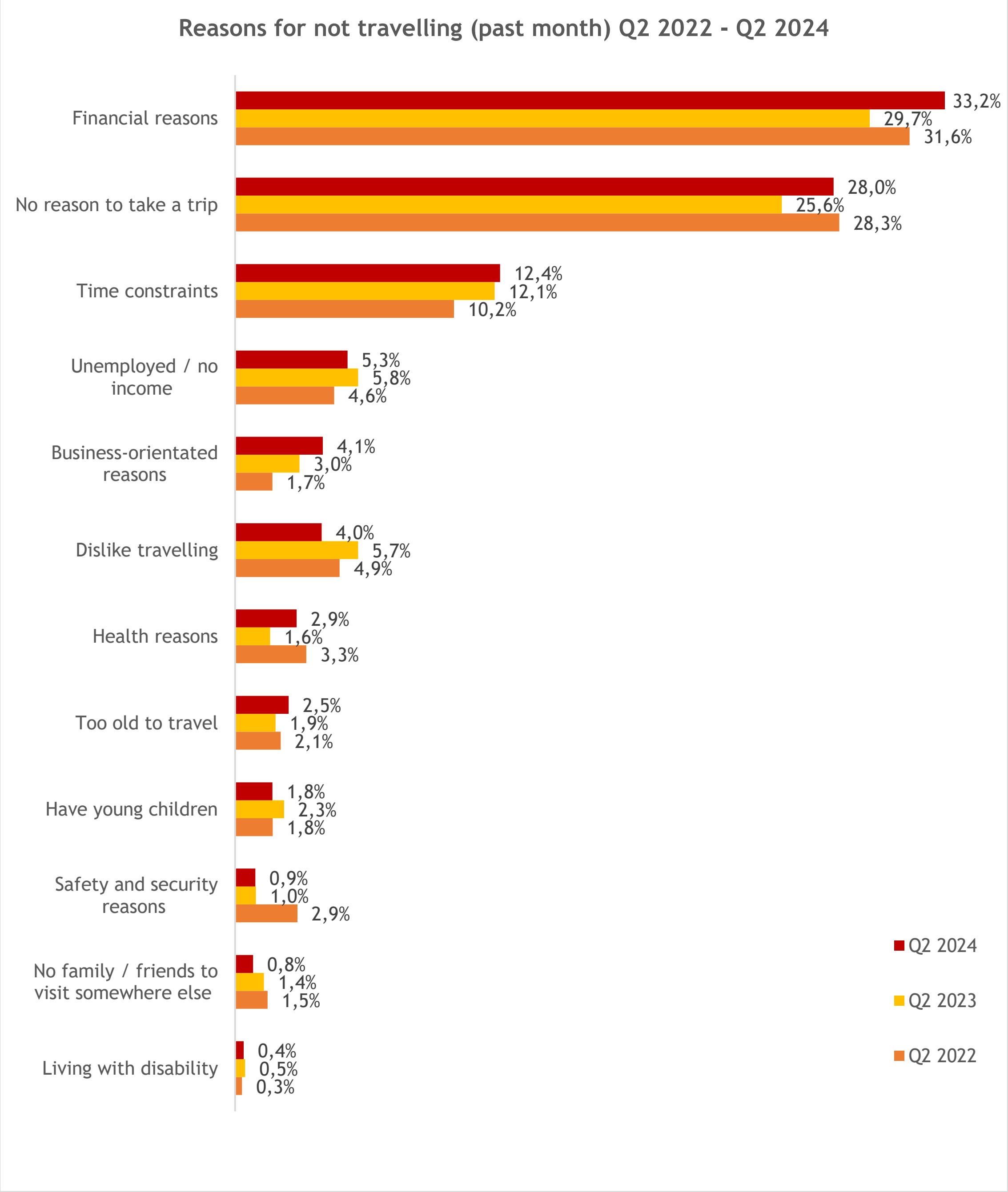
In Q2 2024, domestic tourists declined by similar levels as domestic overnight trips, dropping to a total of 8.8 million tourists (-6.5% compared to Q2 2023), reaching similar levels noted in Q2 2022. Despite this drop, the average number of trips per domestic tourist remained stable at 1.1 trips per domestic tourist.





REASONS FOR NOT TRAVELLING

- Similarly to previous years, the leading cause for not travelling is financial constraints. In Q2 2024, 33.2% of the responses stated were for not travelling was for financial reasons, an increase of +3.5 percentage points above Q2 2023.
- The second highest reason for people not travelling is simply not having a reason to travel, at 28.0% of responses, an increase year on year of +2.4 percentage points.
- Despite small yearly variations, the trend remained consistent, with financial reasons, no reason to travel, and time constraints making up 73.6% of the reasons for not travelling.

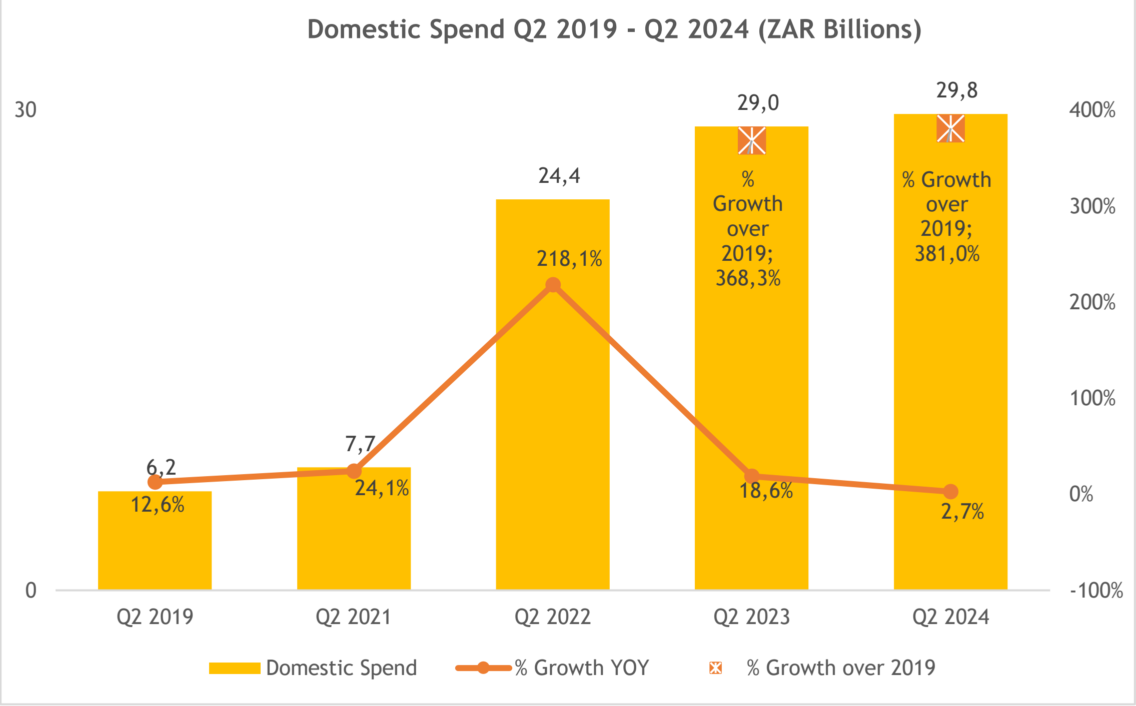


DOMESTIC SPEND

ZAR 29.8 BILLION

+2.7% ▲

In Q2 2024, domestic overnight spending was similar to Q2 2023, with marginal growth of +2.7%, reaching ZAR 29.8 billion. The significant year-on-year increase occurred in Q2 2022, with a growth of +218.1%. Since then, growth has been relatively flat, plateauing below ZAR 30 billion. Total spending grew in both the holiday (up +7.6%) and MICE sectors, with a particularly larger rise of +159.3% in the MICE sector off a relatively lower base. The VFR sector, however, has seen a drop in total spending (down -9.4%). Spend by holidaymakers and VFR accounted for 78.5% of domestic spending, with a share of 46.9% and 31.6%, respectively. These two categories contributed ZAR 23.4 billion out of the total ZAR 29.8 billion, far outweighing other segments like business travel or MICE, whose share remained in the single digits at 6.6% and 5.0%, respectively.



Domestic Spend by Main Purpose Q2 2024 vs. Q2 2023 (ZAR Billions & Shares)

Main Purpose	Q2 2023	Q2 2024	% Share Q2 2023	% Share Q2 2024
Holiday	13.0	14.0	44.8%	46.9%
VFR	10.4	9.4	35.8%	31.6%
Business Traveller	3.0	2.0	10.4%	6.6%
MICE	0.6	1.5	2.0%	5.0%
Religion	0.3	0.6	1.0%	2.0%

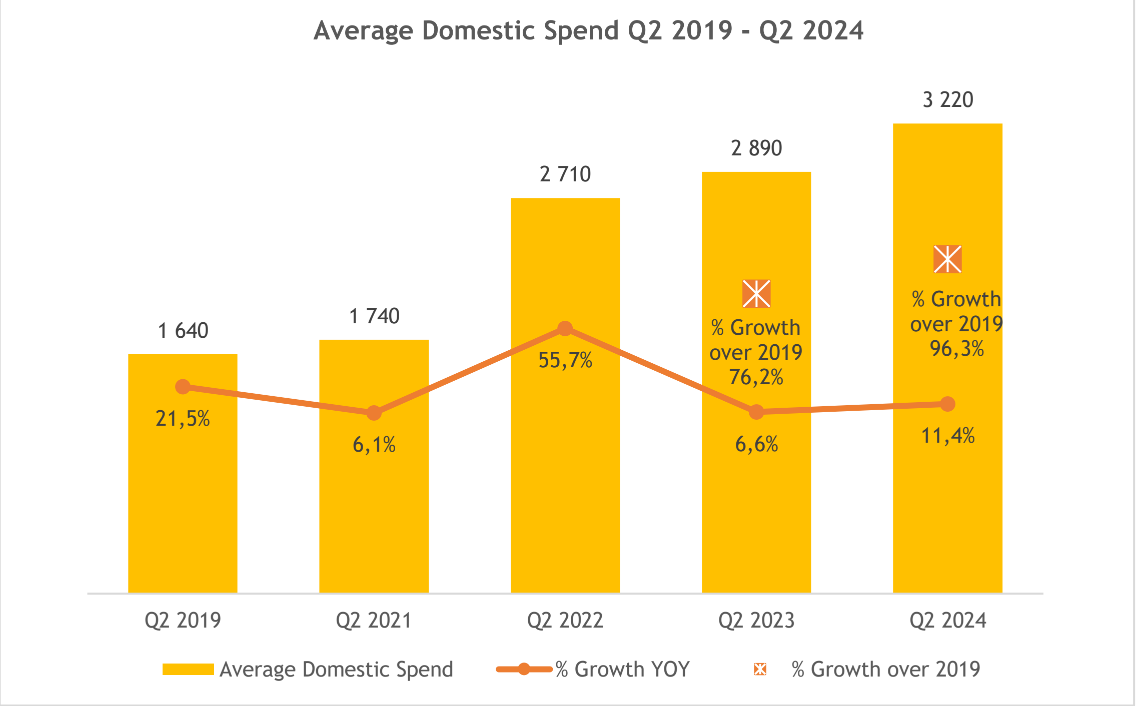
*Personal & business shopping and medical removed due to very low counts.

DOMESTIC SPEND

ZAR 29.8 BILLION

+2.7%

This quarter, the average domestic spend reached ZAR 3 220, reflecting an +11.4% increase compared to Q2 2023. The average spend for MICE visitors saw an impressive growth of +186.0% over the same period this quarter. Both MICE and VFR visitors' spending drove the overall domestic average spend upward, while holidaymakers' spending pulled it down.



Average Domestic Overnight Spend by Main Purpose Q2 2023 - Q2 2024

Average Domestic Spend	Q2 2023	Q2 2024	% Growth 2024 vs. 2023
VFR	2 250	2 500	11.1%
Holiday	4 680	4 460	-4.7%
MICE	1 360	3 890	186.0%
Domestic Trips	2 890	3 220	11.4%

*Personal & business shopping removed due to very low counts.

DOMESTIC SPEND

ZAR 29.8 BILLION

+2.7% ▲

This quarter, accommodation spending noted the most significant growth, rising by +24.5%, correlating with the increased length of stay (+4.5% over Q2 2023). The two largest spend categories; transport and food & beverage spending remained relatively stable this quarter against Q2 2023. Overall, the shift in spending patterns highlights a growing emphasis on accommodation spend, with a notable drop in business-related expenses.

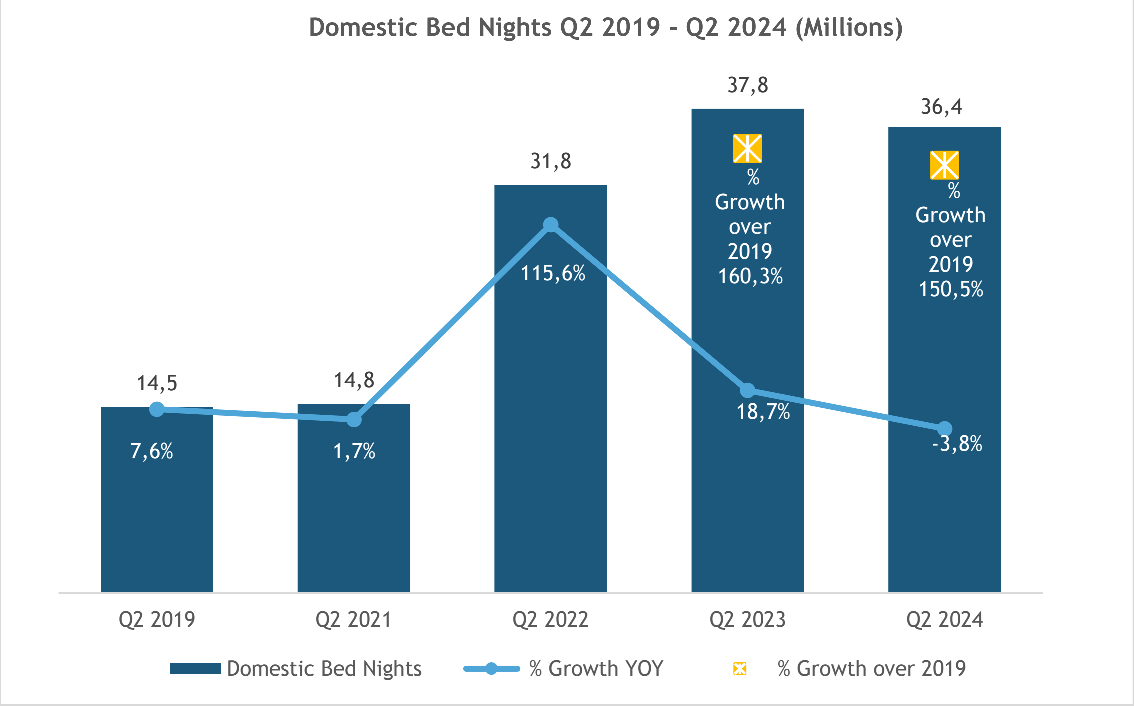
Domestic Spend by Expenditure Category Q2 2022 - Q2 2024 (ZAR Billions)

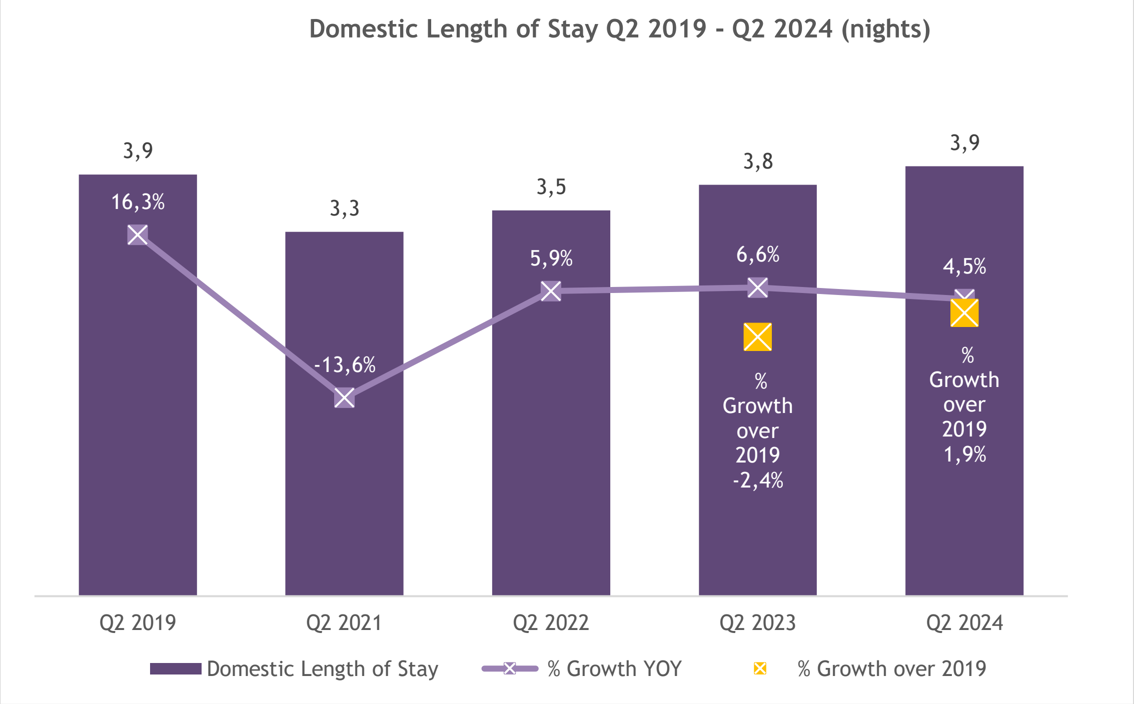
Expenditure Category	Q2 2023	Q2 2024	% Growth 2023-2024
Transport	6.2	6.1	-2.1%
Food & Beverage	4.9	5.0	2.3%
Accommodation	3.3	4.2	24.5%
Personal Shopping	1.4	1.6	18.9%
Leisure	0.5	0.7	37.4%
Business Shopping	0.2	0.1	-49.8%

*Personal & business shopping removed due to very low counts.

BED NIGHTS 29.2 MILLION +4.6% ▲

In Q2 2024, domestic bed nights declined slightly by -3.8% from 37.8 million to 36.4 million. Despite this decrease, bed nights in Q2 2024 remained significantly higher than pre-pandemic levels, indicating a sustained recovery in domestic tourism. On the other hand, the average length of stay noted a modest increase of +4.5%, rising from an average of 3.8 nights in Q2 2023 to 3.9 nights in Q2 2024. This suggests that while fewer trips were taken in 2024 compared to 2023, those who did travel stayed for slightly longer, maintaining overall spending levels despite the dip in total bed nights.





PROVINCIAL

PERFORMANCE OF MAIN DESTINATION

- **Eastern Cape:** Recorded 1.2 million domestic overnight trips, resulting in an overnight spend of ZAR 2.1 billion. The province accounted for 4.2 million bed nights. The average spend per trip was lowest in the country at ZAR 1 740, despite the moderate length of stay of an average of 3.6 nights.
- **Free State:** Reaching 0.9 million domestic overnight trips, generating an overnight spend of ZAR 2.4 billion. The average spend per trip was ZAR 2 630, which is slightly above the national average. Bed nights totalled 2.9 million, with an average stay of 3.2 nights. Although the Free State saw fewer trips and shorter stays compared to larger provinces, it had a relatively higher average spend per trip.
- **Gauteng:** With the highest number of domestic overnight trips at 2.1 million, an impressive overnight spend of ZAR 5.9 billion was recorded, with the second highest spend across the provinces. The average spend per trip was ZAR 2 820, and bed nights reached 11.2 million, with an average stay of 5.3 nights.
- **KwaZulu-Natal:** Reported 1.0 million domestic overnight trips, with an overnight spend of ZAR 6.3 billion. The average spend per trip reached ZAR 6 040, the highest across all provinces. Bed nights were 3.7 million, with an average stay of 3.5 nights. The province’s high spend per trip, paired with moderately long stays, suggests that KwaZulu-Natal is a destination where travellers prioritise coastal tourism, justify the significant expenditure.
- **Limpopo:** Recorded 1.4 million domestic overnight trips, with an overnight spend of ZAR 4.7 billion. The average spend per trip was ZAR 3 490, indicating a higher average spend compared to some other provinces. Bed nights were 3.7 million, and the average stay was 2.7 nights. Limpopo saw relatively high visitation but shorter stays, implying that travellers may be focused on specific attractions such as nature reserves, leading to shorter but high-quality trips.
- **Mpumalanga:** Saw 0.9 million domestic overnight trips, generating an overnight spend of ZAR 3.0 billion. The average spend per trip was ZAR 3 470. Bed nights were 1.8 million, with an average stay of 2.1 nights. Though Mpumalanga ranks lower in terms of total visits, the higher average spend per trip suggests that travellers invest in premium tourism experiences, particularly for nature and wildlife. The shorter length of stay may indicate focused visits to key attractions, such as the Kruger National Park.
- **North West:** Noted 0.9 million domestic overnight trips, with an overnight spend of ZAR 1.7 billion. The average spend per trip was ZAR 1 820, the second lowest among the provinces. Bed nights were 6.2 million, and the average stay was the longest at 6.7 nights.
- **Northern Cape:** Had the fewest trips at 0.2 million, with an overnight spend of ZAR 0.3 billion. The average spend per trip was ZAR 1 900. Bed nights were minimal at 0.3 million, with an average stay of 2.3 nights.
- **Western Cape:** Recorded 0.7 million trips, generating an overnight spend of ZAR 3.3 billion. The average spend per trip was ZAR 4 890, one of the highest in the country. Bed nights were 2.4 million, with an average stay of 3.5 nights.

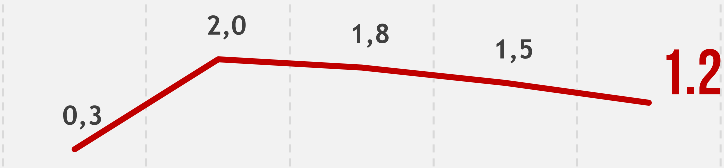
Domestic Overnight Key Performance Indicators by Main Destination Q2 2024

Main Destination Province	Domestic Overnight Trips (Millions)	Overnight Spend (ZAR Billions)	Average Overnight Spend (ZAR)	Bednights (Millions)	Length of Stay (Nights)
Eastern Cape	1.2	2.1	1740	4.2	3.6
Free State	0.9	2.4	2630	2.9	3.2
Gauteng	2.1	5.9	2820	11.2	5.3
KwaZulu Natal	1.0	6.3	6040	3.7	3.5
Limpopo	1.4	4.7	3490	3.7	2.7
Mpumalanga	0.9	3.0	3470	1.8	2.1
Northern Cape	0.2	0.3	1900	0.3	2.3
North West	0.9	1.7	1820	6.2	6.7
Western Cape	0.7	3.3	4890	2.4	3.5

EASTERN CAPE

1.2 MILLION -23.3%

DOMESTIC OVERNIGHT TRIPS



1.2 MILLION

-23.3%

DOMESTIC OVERNIGHT SPEND

2.1 BILLION

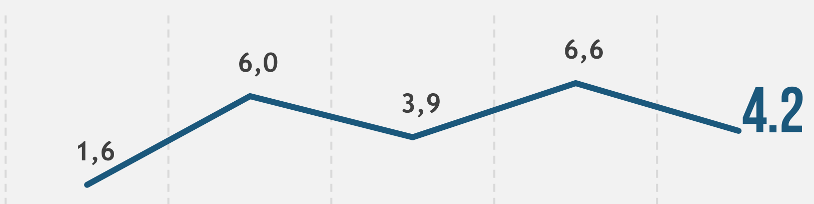
-60.0%

AVE. DOMESTIC OVERNIGHT SPEND

ZAR 1 740

-47.9%

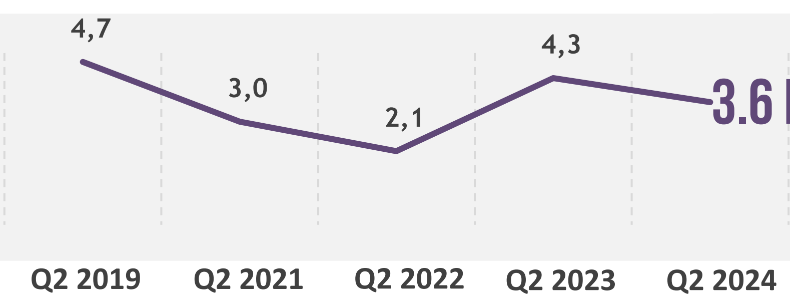
BED NIGHTS



4.2 MILLION

-35.9%

LENGTH OF STAY



3.6 NIGHTS

-16.4%

Key growth and change rates shown in this report are in comparison to 2023.
Data reported for Domestic Overnight Spend and Ave. Spend is based on the total spend of the journey and not exclusively to the Main Destination.

EASTERN CAPE

1.2 MILLION -23.3%▼

Share of Eastern Cape Overnight Trips by Main Purpose Q2 2024

Eastern Cape	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	42.0%	3.3%	8.3%	2.1%	16.1%	14.9%
Percentage Point Change vs. 2023	-15.7	-6.6	-6.4	0.7	16.1	3.6

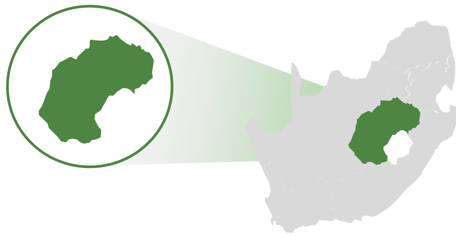
Eastern Cape Overnight Spend by Main Purpose Q2 2024

Eastern Cape	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	47.6%	4.2%	15.6%	0.0%	8.7%	5.0%
Percentage Point Change vs. 2023	-15.3	-7.1	-4.3	0.0	8.7	2.9

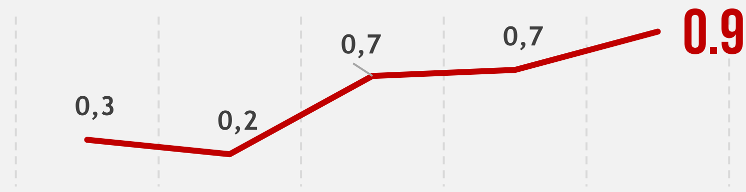
Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

FREE STATE

0.9 MILLION +32.9% ▲



DOMESTIC OVERNIGHT TRIPS



0.9 MILLION

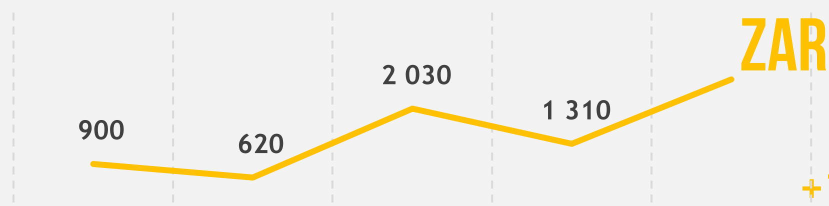
+32.9% ▲

DOMESTIC OVERNIGHT SPEND

2.4 BILLION

+167.5% ▲

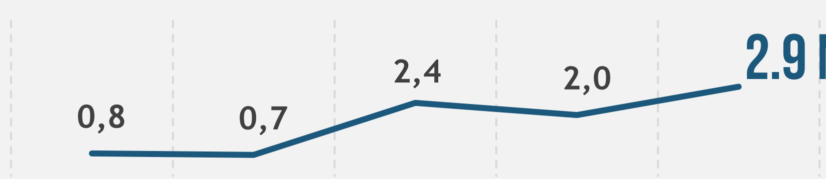
AVE. DOMESTIC OVERNIGHT SPEND



ZAR 2 630

+100.8% ▲

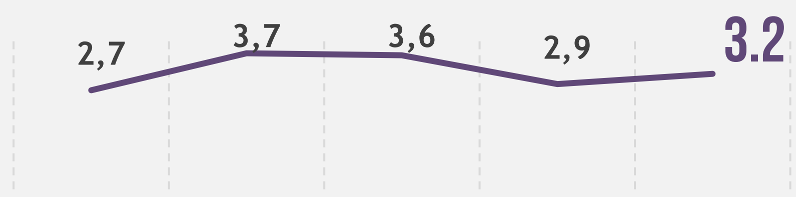
BED NIGHTS



2.9 MILLION

+45.5% ▲

LENGTH OF STAY



3.2 NIGHTS

+9.4% ▲

Q2 2019 Q2 2021 Q2 2022 Q2 2023 Q2 2024

Key growth and change rates shown in this report are in comparison to 2023.
Data reported for Domestic Overnight Spend and Ave. Spend is based on the total spend of the journey and not exclusively to the Main Destination.

FREE STATE

0.8 MILLION +47.8%

Share of Free State Overnight Trips by Main Purpose Q2 2024

Free State	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	48.0%	26.9%	11.1%	0.8%	0.0%	0.0%
Percentage Point Change vs. 2023	-3.14	16.25	11.07	0.14	-6.80	-1.80

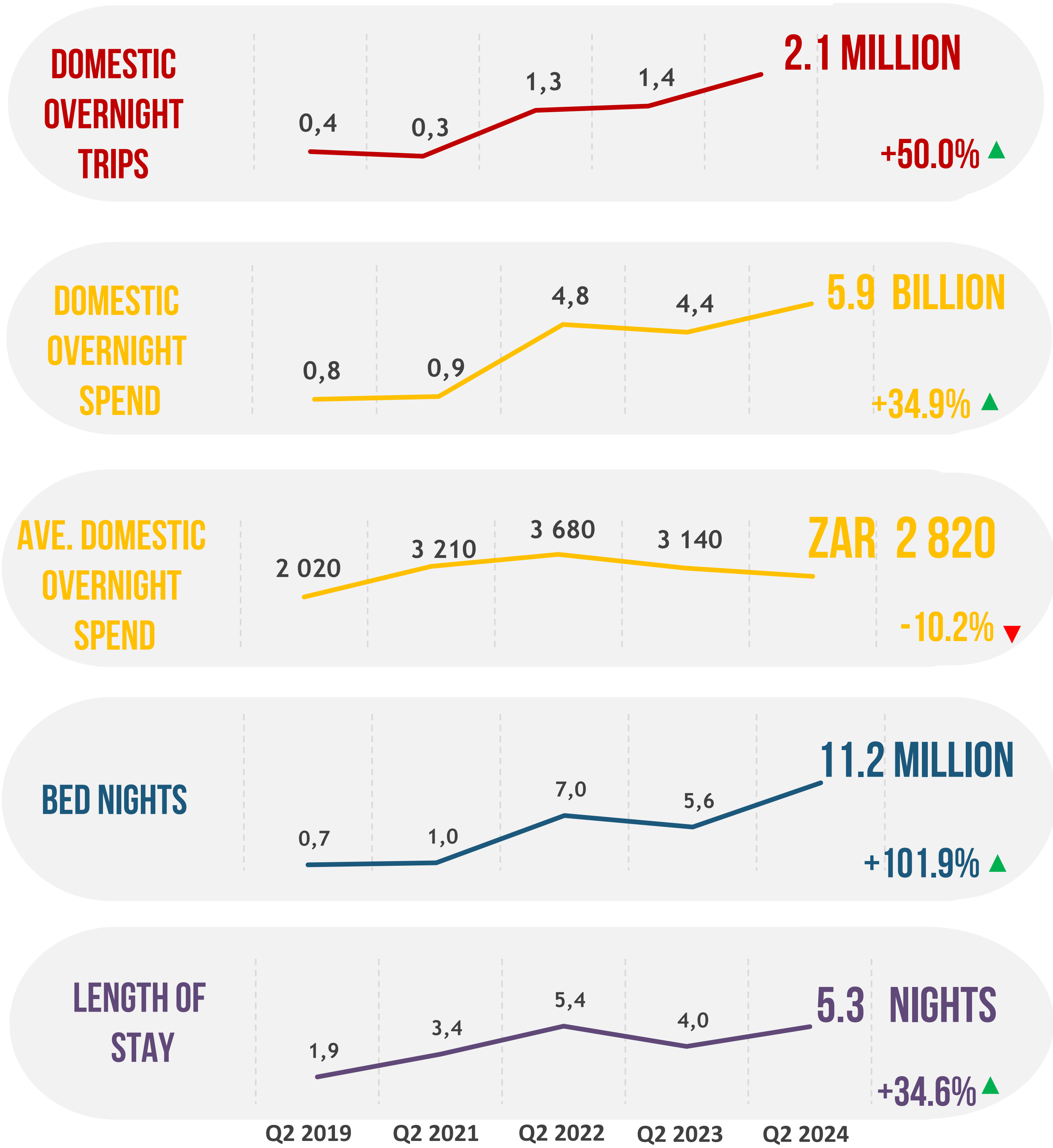
Free State Overnight Spend by Main Purpose Q2 2024

Free State	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	35.2%	12.7%	27.7%	2.9%	0.0%	0.0%
Percentage Point Change vs. 2023	-13.0	-19.4	27.7	1.0	-1.8	-2.3

Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

GAUTENG

2.1 MILLION +50.0%



Key growth and change rates shown in this report are in comparison to 2023.
Data reported for Domestic Overnight Spend and Ave. Spend is based on the total spend of the journey and not exclusively to the Main Destination.

GAUTENG

1 .4 MILLION -34.6%

Share of Gauteng Overnight Trips by Main Purpose Q2 2024

Gauteng	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	42.2%	38.3%	8.0%	2.6%	0.0%	2.0%
Percentage Point Change vs. 2023	-1.0	5.9	-3.5	-4.2	0.0	-0.2

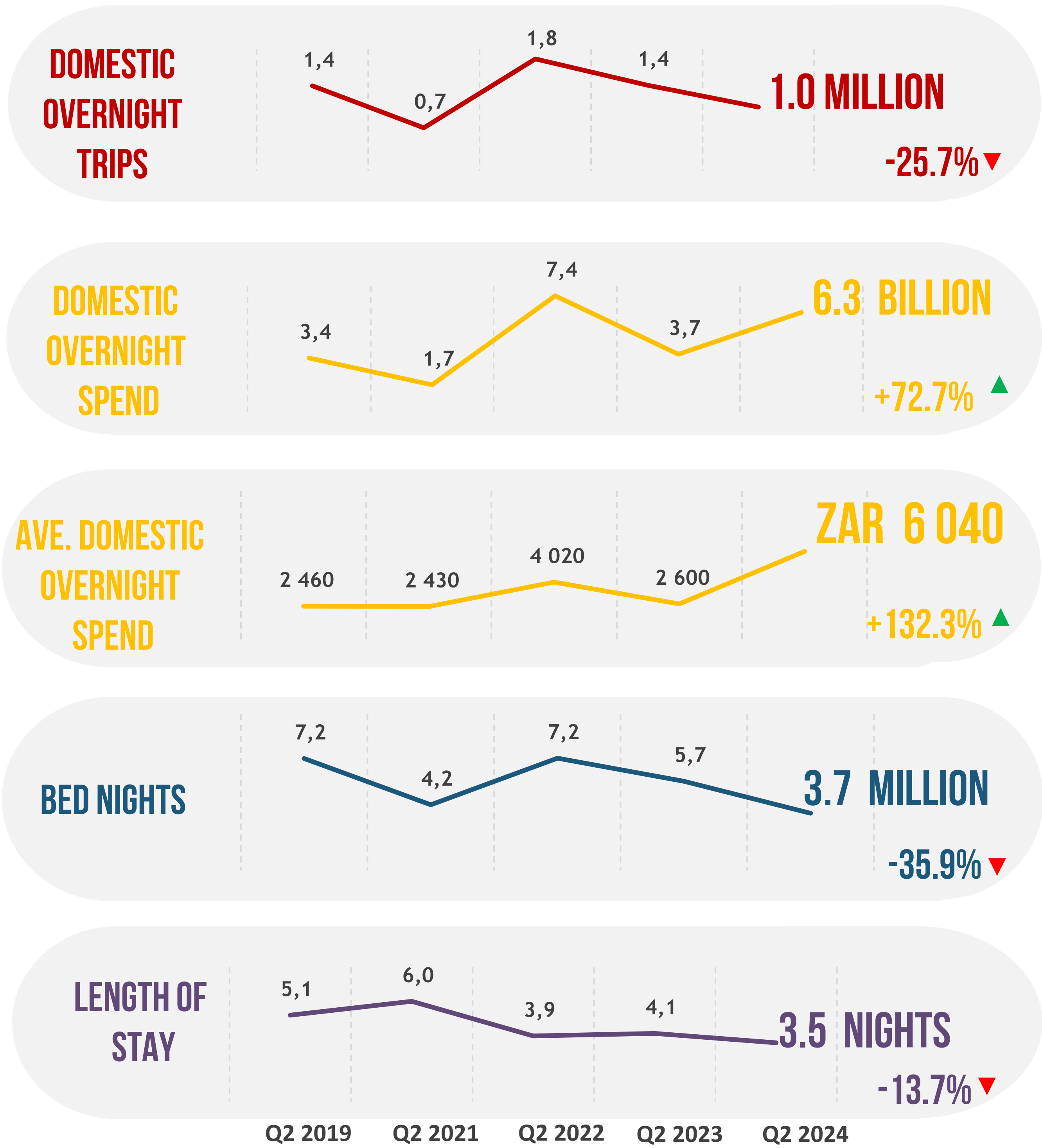
Gauteng Overnight Spend by Main Purpose Q2 2024

Gauteng	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	36.9%	35.1%	8.3%	3.8%	0.0%	2.9%
Percentage Point Change vs. 2023	2.3	-5.8	-4.8	3.0	0.0	1.6

Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

KWAZULU-NATAL

1.0 MILLION -25.7%



Key growth and change rates shown in this report are in comparison to 2023.
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KWAZULU-NATAL

1.2 MILLION

+21.8%

Share of KwaZulu-Natal Overnight Trips by Main Purpose Q2 2024

KwaZulu-Natal	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	33.3%	54.2%	1.8%	0.9%	2.4%	0.6%
Percentage Point Change vs. 2023	0.0	19.4	-14.3	-2.5	2.4	0.4

KwaZulu-Natal Overnight Spend by Main Purpose Q2 2024

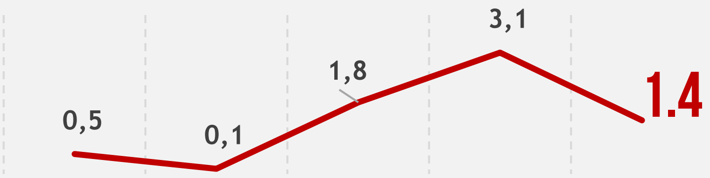
KwaZulu-Natal	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	11.1%	76.4%	6.6%	1.3%	1.2%	0.2%
Percentage Point Change vs. 2023	-12.8	14.5	6.6	-4.9	1.2	0.2

Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

LIMPOPO

1.4 MILLION -55.7% ▼

DOMESTIC OVERNIGHT TRIPS

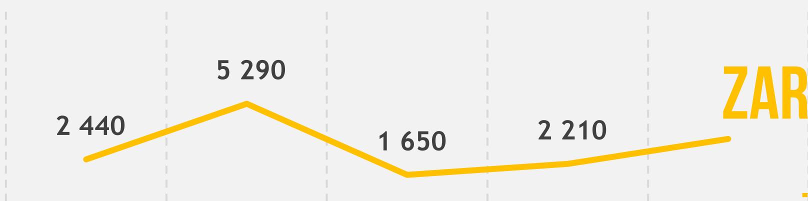


1.4 MILLION
-55.7% ▼

DOMESTIC OVERNIGHT SPEND

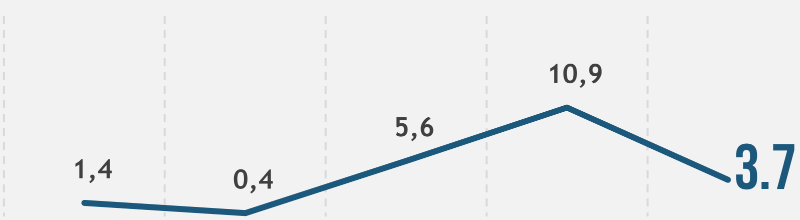
4.7 BILLION
-30.1% ▼

AVE. DOMESTIC OVERNIGHT SPEND



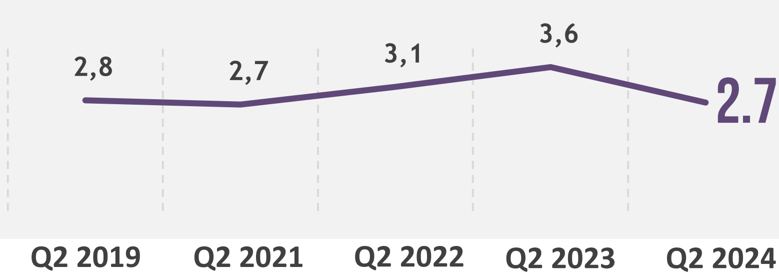
ZAR 3 490
+57.9% ▲

BED NIGHTS



3.7 MILLION
-66.3% ▼

LENGTH OF STAY



2.7 NIGHTS
-23.8% ▼

Key growth and change rates shown in this report are in comparison to 2023.
Data reported for Domestic Overnight Spend and Ave. Spend is based on the total spend of the journey and not exclusively to the Main Destination.

LIMPOPO

1.4 MILLION -55.7%

Share of Limpopo Overnight Trips by Main Purpose Q2 2024

Limpopo	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	57.1%	34.4%	0.0%	2.7%	0.0%	3.4%
Percentage Point Change vs. 2023	6.9	9.6	-4.5	-2.1	0.0	3.4

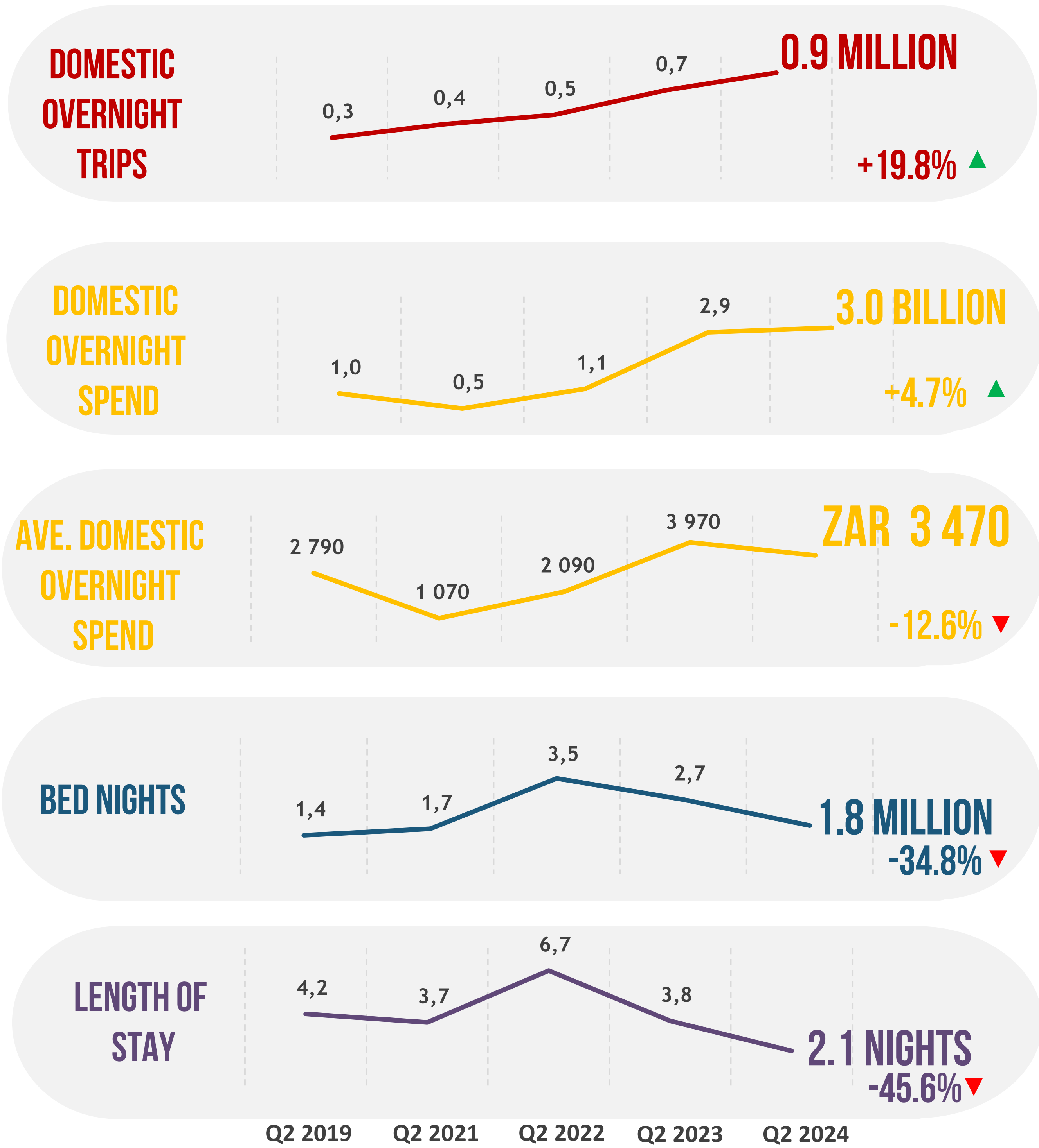
Limpopo Overnight Spend by Main Purpose Q2 2024

Limpopo	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	47.1%	45.1%	0.0%	3.5%	0.0%	0.4%
Percentage Point Change vs. 2023	8.2	3.5	-9.1	2.1	0.0	0.4

Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

MPUMALANGA

0.9 MILLION +19.8%



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MPUMALANGA

0.9 MILLION +19.8%

Share of Mpumalanga Overnight Trips by Main Purpose Q2 2024

Mpumalanga	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	19.3%	41.5%	3.1%	14.4%	0.0%	21.6%
Percentage Point Change vs. 2023	-28.2	8.2	-8.2	7.1	0.0	21.6

Mpumalanga Overnight Spend by Main Purpose Q2 2024

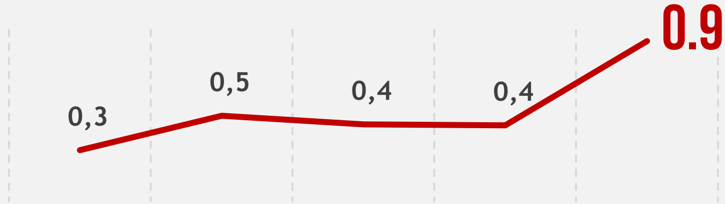
Mpumalanga	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	30.9%	51.9%	0.5%	14.4%	0.0%	2.4%
Percentage Point Change vs. 2023	3.5	-14.2	-1.9	10.3	0.0	2.4

Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

NORTH WEST

0.9 MILLION +109.7% ▲

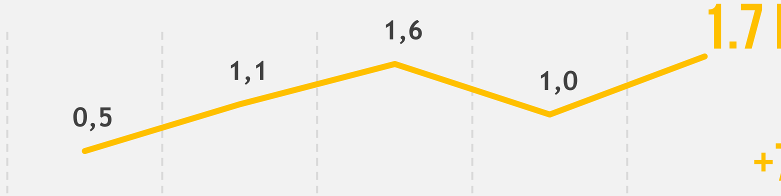
DOMESTIC OVERNIGHT TRIPS



0.9 MILLION

+109.7% ▲

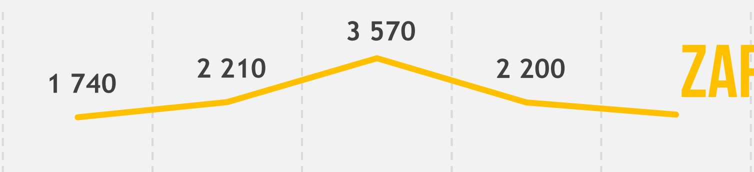
DOMESTIC OVERNIGHT SPEND



1.7 BILLION

+73.9% ▲

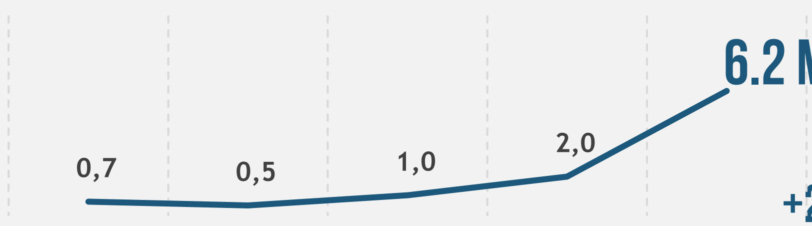
AVE. DOMESTIC OVERNIGHT SPEND



ZAR 1 820

-17.3% ▼

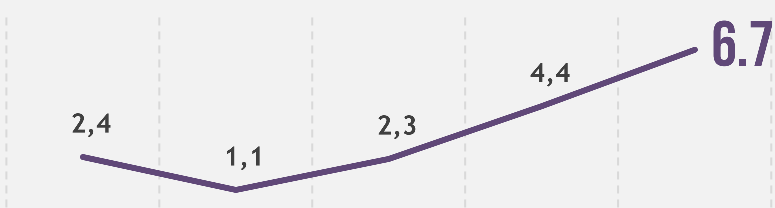
BED NIGHTS



6.2 MILLION

+217.3% ▲

LENGTH OF STAY



6.7 NIGHTS

+51.3% ▲

Q2 2019 Q2 2021 Q2 2022 Q2 2023 Q2 2024

Key growth and change rates shown in this report are in comparison to 2023.
Data reported for Domestic Overnight Spend and Ave. Spend is based on the total spend of the journey and not exclusively to the Main Destination.

NORTH WEST

0.9 MILLION +109.7%

Share of North West Overnight Trips by Main Purpose Q2 2024

North West	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	45.2%	18.4%	5.0%	9.3%	0.0%	3.6%
Percentage Point Change vs. 2023	3.8	-24.7	0.2	3.1	0.0	3.6

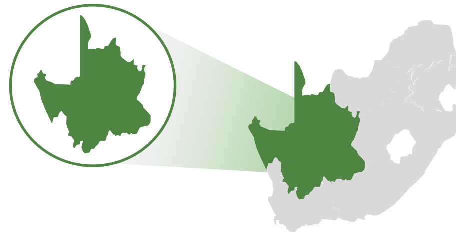
North West Overnight Spend by Main Purpose Q2 2024

North West	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	29.6%	37.0%	2.6%	24.7%	0.0%	3.2%
Percentage Point Change vs. 2023	8.5	-3.1	-34.1	23.0	0.0	3.2

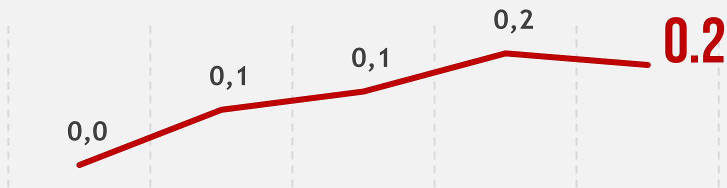
Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

NORTHERN CAPE

0.2 MILLION -8.6% ▼



DOMESTIC OVERNIGHT TRIPS



0.2 MILLION

-8.6% ▼

DOMESTIC OVERNIGHT SPEND

0.3 BILLION

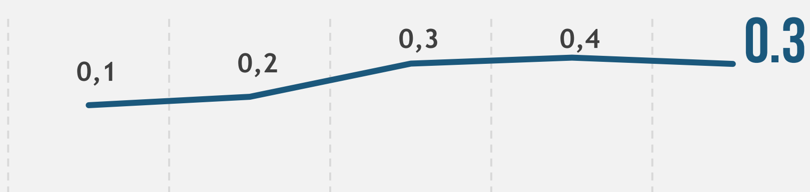
-65.6% ▼

AVE. DOMESTIC OVERNIGHT SPEND

ZAR 1 900

-62.3% ▼

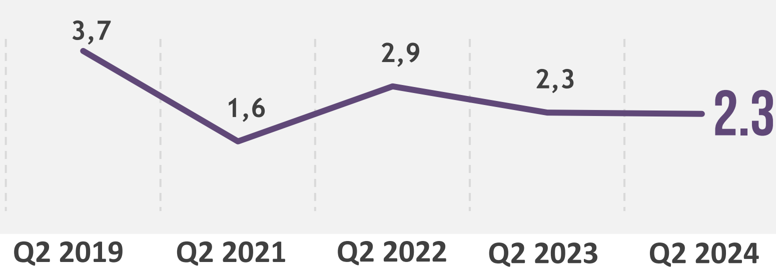
BED NIGHTS



0.3 MILLION

-9.6% ▼

LENGTH OF STAY



2.3 NIGHTS

-1.0% ▼

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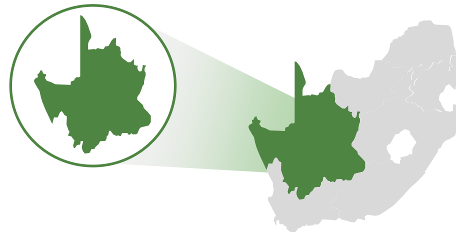
Data reported for Domestic Overnight Spend and Ave. Spend is based on the total spend of the journey and not exclusively to the Main Destination.

NORTHERN CAPE

0.2 MILLION -8.6%



Share of Northern Cape Overnight Trips by Main Purpose Q2 2024

Northern Cape	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	51.7%	0.0%	0.0%	12.2%	0.0%	0.0%
Percentage Point Change vs. 2023	6.14	-43.63	-10.76	12.16	0.00	0.00

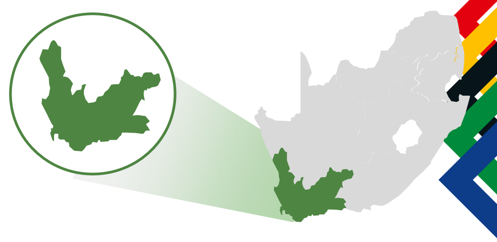
Northern Cape Overnight Spend by Main Purpose Q2 2024

Northern Cape	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	93.0%	0.0%	0.0%	3.2%	0.0%	0.0%
Percentage Point Change vs. 2023	73.3	-62.1	-18.2	3.2	0.0	0.0

Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

WESTERN CAPE

0.7 MILLION +15.1%



DOMESTIC OVERNIGHT TRIPS

0.7 MILLION

+15.1%

DOMESTIC OVERNIGHT SPEND

3.3 BILLION

-2.3%

AVE. DOMESTIC OVERNIGHT SPEND

ZAR 4 890

-15.1%

BED NIGHTS

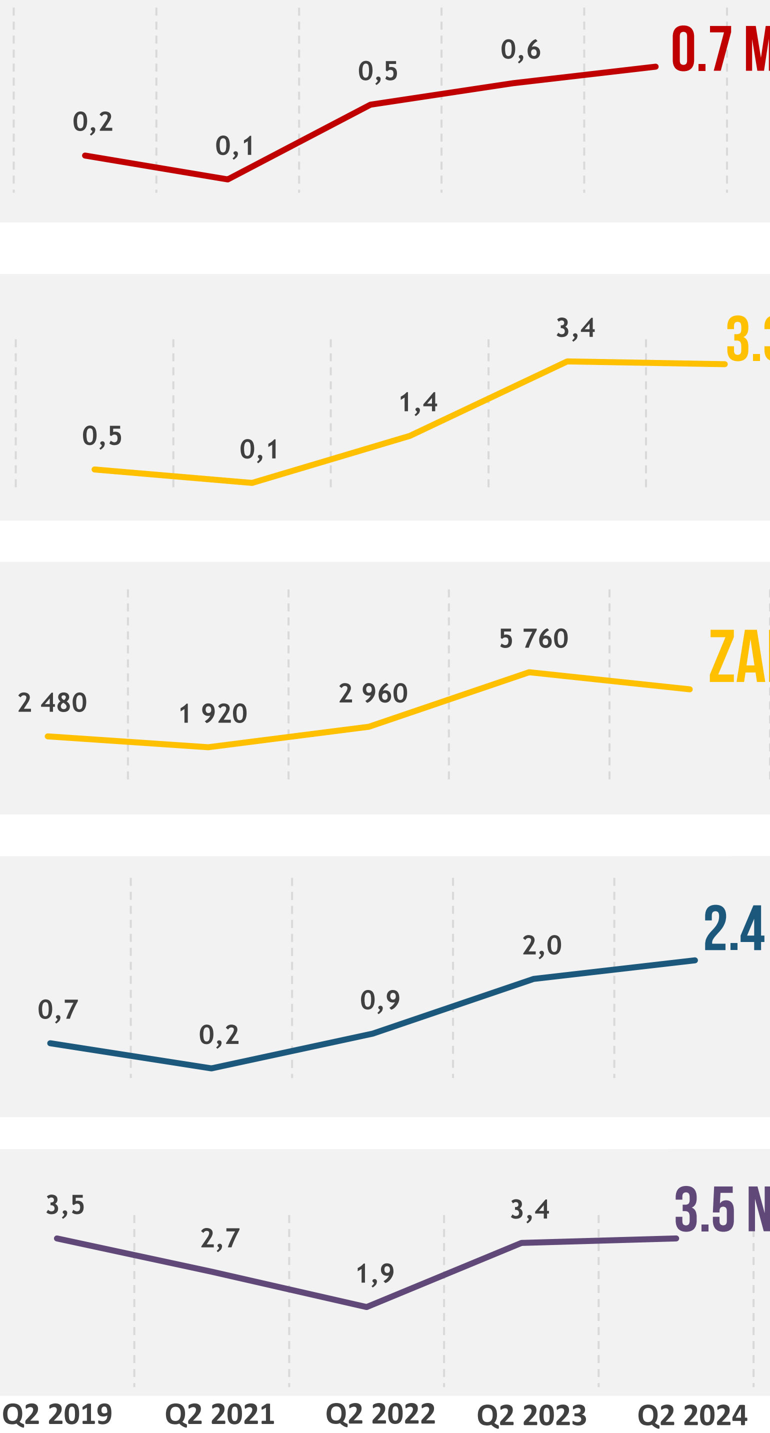
2.4 MILLION

+18.6%

LENGTH OF STAY

3.5 NIGHTS

+3.1%



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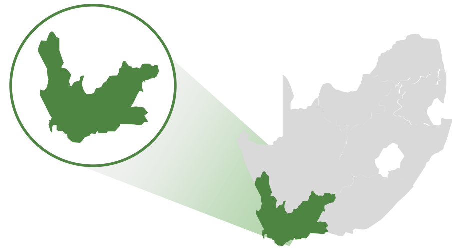
WESTERN CAPE

0.7 MILLION +15.1%



Share of Western Cape Overnight Trips by Main Purpose Q2 2024

Western Cape	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Trips Q2 2024	22.0%	69.8%	3.3%	2.4%	0.0%	2.5%
Percentage Point Change vs. 2023	-2.6	12.6	-4.9	-1.6	0.0	0.2

Western Cape Overnight Spend by Main Purpose Q2 2024

Western Cape	VFR	Holiday	Business Traveller	MICE	Medical	Religion
Share Spend Q2 2024	22.3%	70.3%	0.0%	2.3%	0.0%	5.0%
Percentage Point Change vs. 2023	8.0	-0.6	-6.6	0.4	0.0	2.3

Personal & business shopping removed due to very low counts.
Key growth and change rates shown in this report are in comparison to 2023.

South Africa
Inspiring new ways

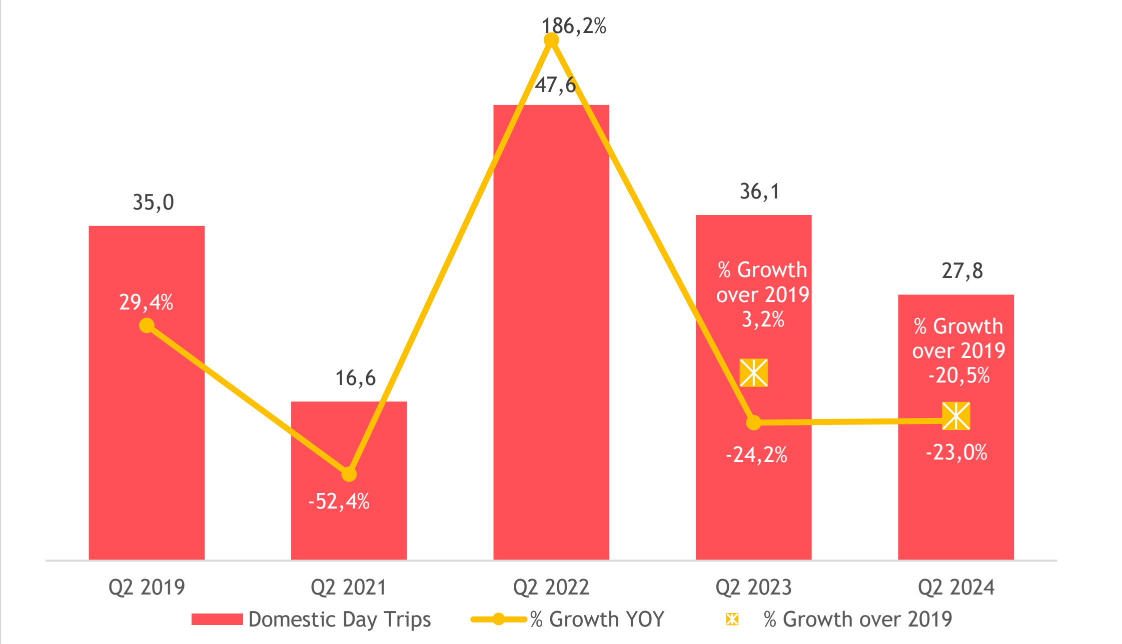
DAY TRIPS

DOMESTIC TOURISM

DOMESTIC DAY TRIPS | **27.8 MILLION** | **-23.0% ▼**

The total number of Domestic day trips experienced a decline of -23.0% against Q2 2023, totalling 27.8 million domestic day trips in Q2 2024. This quarter, the total number of domestic day trips dipped below Q2 2019 levels by -20.5%. In Q2 2024, steep declines are noted in domestic day trips for business purposes (-49.4% vs Q2 2023) and domestic holiday day trips (-19.1% vs Q2 2023).

Domestic Day Trips Q2 2020 - Q2 2024 (Millions)



Domestic Day Trips by Purpose
(Actual Millions, Share & *Growth YOY* or Growth Q2 2024 vs. Q2 2023)

Q2 2024		Growth	Q2 2023	
PERSONAL SHOPPING			**PERSONAL SHOPPING**	
6.4m	22.9%	+8.9%	5.8m	16.2%
BUSINESS			**BUSINESS**	
2.6m	9.5%	-49.4%	5.2m	14.5%
HOLIDAY			**HOLIDAY**	
5.7m	20.5%	-19.1%	7.1m	19.6%
RELIGIOUS			**RELIGIOUS**	
0.6m	2.3%	+5.4%	0.6m	1.7%

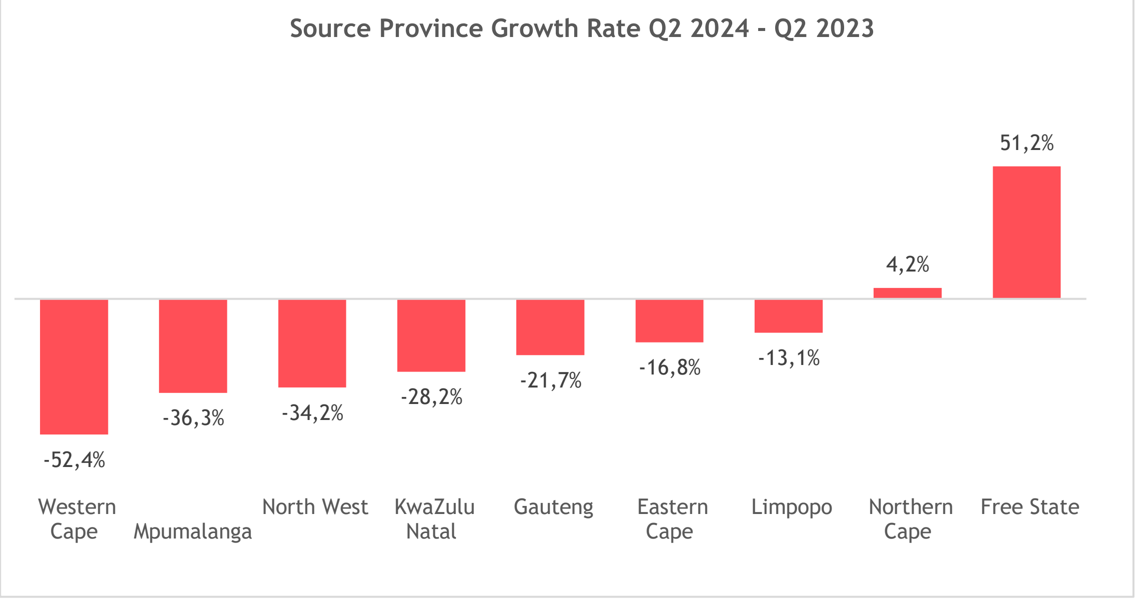
Note: the definition of a day trip was revised in Q3 2023

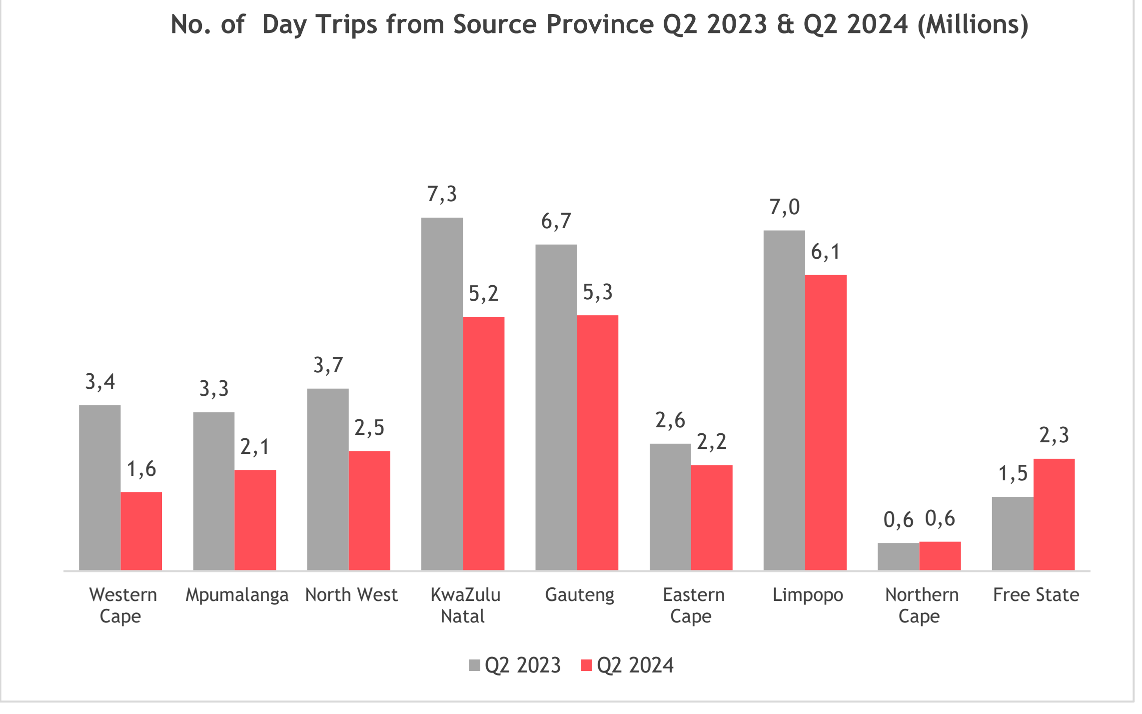
DOMESTIC DAY TRIPS

27.8 MILLION

-23.0% ▼

In the second quarter of 2024, a negative growth rate in domestic day trips was observed across most provinces except the Free State which increased by +51.2% as a source province for domestic day trips against Q2 2023. The Western Cape declined sharply by -52.4% as a source province this quarter reaching only 1.6 million day trips. Limpopo remained relatively strong with a moderate decline of -13.1% against Q2 2023 and noting the highest number of day trips (6.1 million) this quarter. In Q2 2024, the number of arrivals to KwaZulu-Natal arrivals decreased by -28.2% placing it third highest ranking in day trips, whereas last year KwaZulu-Natal was the top source province for day trips.



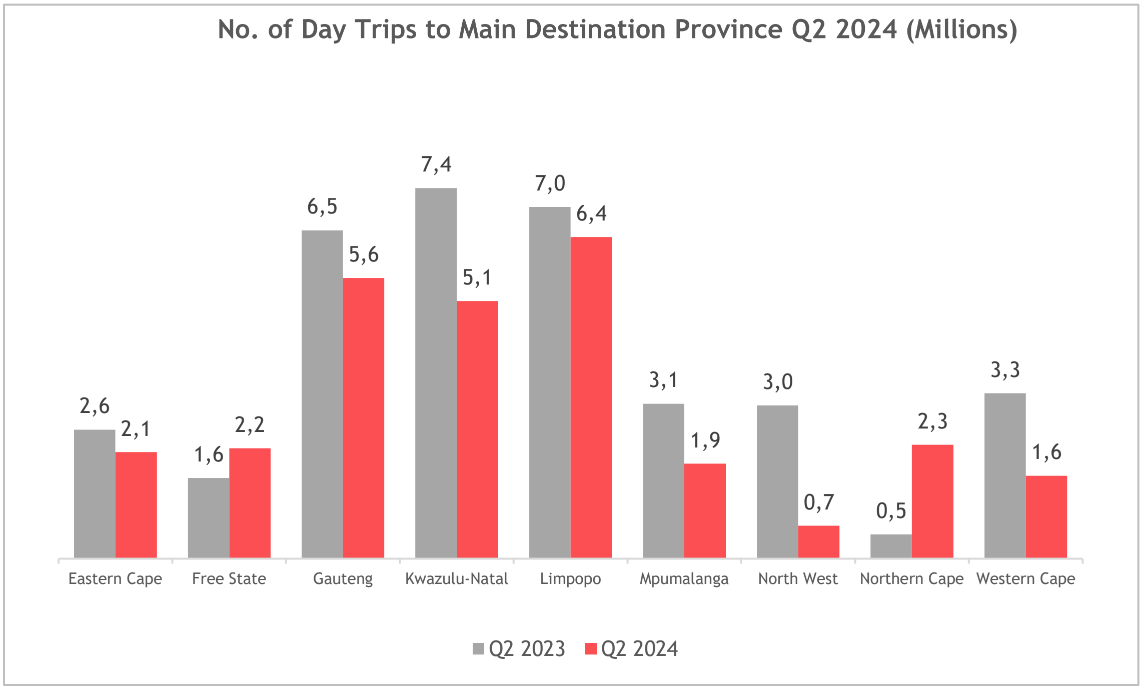


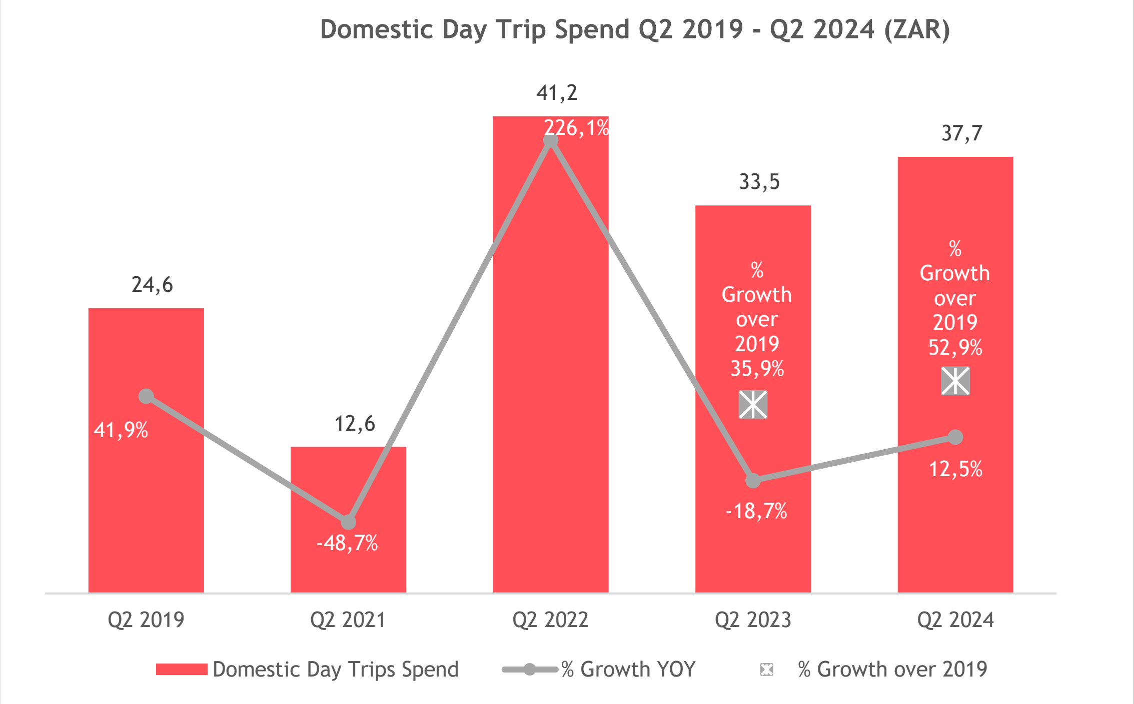
DOMESTIC DAY TRIPS

27.8 MILLION

-23.0% ▼

This quarter, Limpopo was not only the highest source province for domestic day trips, but it also noted the highest day trips as a key main destination, reaching a total of 6.4 million day trip visits. In Q2 2024, Gauteng and KwaZulu-Natal followed closely having received the second and third highest number of Domestic Day trip visits at 5.6 million and 5.1 million. Despite the total number of domestic day trips dipping below Q2 2019 levels, robust spending levels are noted with an increase of +12.5% against Q2 2023 reaching a total of ZAR 37.7 billion for Q2 2024.





Main Destination question was introduced in April 2023; therefore, no trended data is available in Q4 2023.

SOUTH AFRICAN

ECONOMY

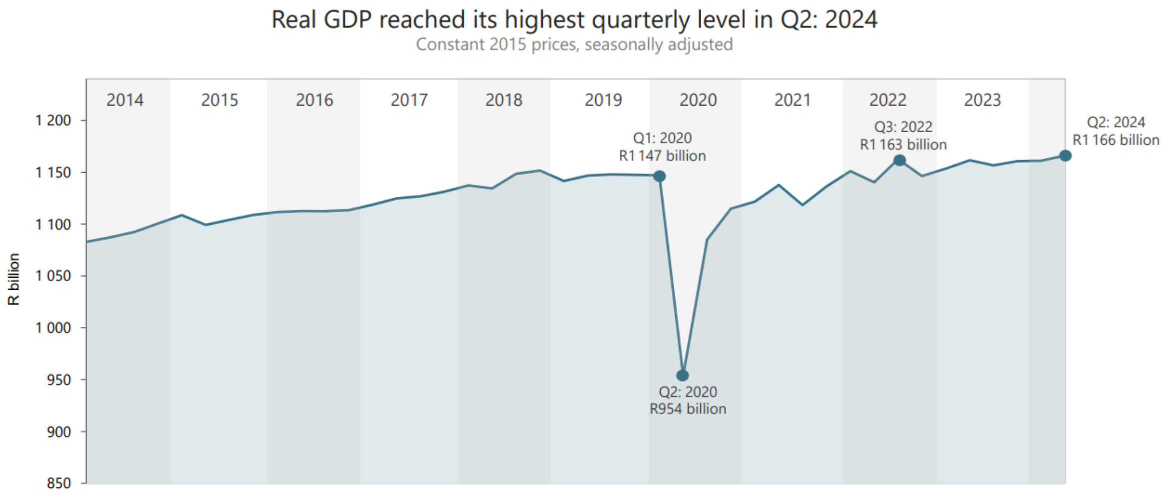
THE SOUTH AFRICAN ECONOMY

+0.4* ▲

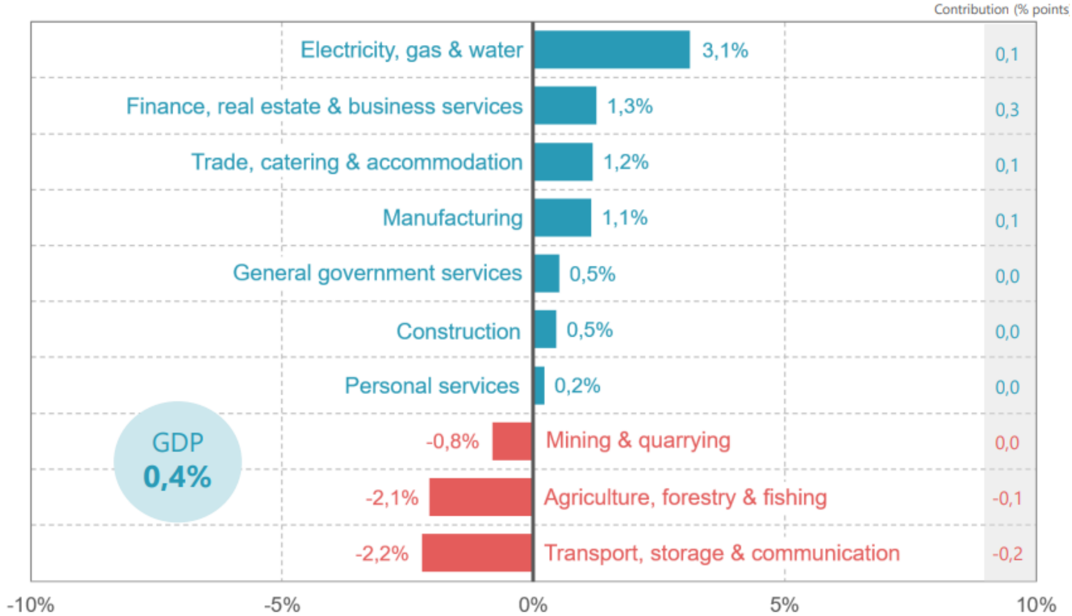
[1]Real gross domestic product (GDP) measured by production, increased by 0.4% in the second quarter of 2024, following a 0.0% growth in the first quarter of 2024.

Seven industries recorded positive growth between the first quarter of 2024 and the second quarter of 2024. The finance industry increased by 1.3% and contributed 0.3 of a percentage point to the GDP growth. The trade, catering and accommodation industry increased by 1.2% and contributed 0.1 of a percentage point. The manufacturing industry increased by 1.1% and contributed 0.1 of a percentage point. The transport industry was the main negative contributor, decreasing by 2.2% and contributing -0.2 of a percentage point.[1]

SA Real GDP Q1 2016 - Q2 2024[2]
(constant 2015 prices, seasonally adjusted)



SA GDP Industry Growth Rates Q2 2024 vs. Q1 2024[2]
(constant 2015 prices, seasonally adjusted)



*Over Q1 2024.

[1] Statistical Releases P0441: GDP P0441- 2023Q2.

[2]GDP 2024 Q2 (Media presentation)

TECHNICAL NOTES

RESPONSE RATES AT PROVINCIAL LEVEL

Response rates at a provincial level against the quarterly quotas which were all achieved for Q2 2024.

PROVINCE	QUARTERLY QUOTA	QUARTERLY ACHIEVED SAMPLE	COMPLETION RESPONSE RATE %
Eastern Cape	480	480	100%
Free State	296	296	100%
Gauteng	1024	1024	100%
KwaZulu Natal	672	672	100%
Limpopo	176	176	100%
Mpumalanga	200	200	100%
North West	196	196	100%
Northern Cape	128	128	100%
Western Cape	728	728	100%
Total	**3900**	**3900**	**100%**

MEASURE OF PRECISION

This section provides an overview of the standard error, confidence interval, and coefficient of variation (CV) for overnight trips. Estimates were computed based on a complex multi-stage survey design with stratification, clustering, and unequal weighting.

Confidence Intervals are aa range of values derived from the survey data that likely contains the true population parameter (e.g., incidence rate) with a specified level of confidence (usually 95%). Confidence intervals provide a measure of the uncertainty or precision of the survey estimate. A narrower interval indicates greater precision.
Standard Error is the standard deviation of the sampling distribution of a statistic, such as the mean or proportion. The standard error quantifies the amount of variation in the sample estimate and is used to construct confidence intervals. Smaller standard errors indicate more precise estimates.
Coefficient of Variation (CV) is a measure of relative variability, calculated as the ratio of the standard error to the mean, often expressed as a percentage. The CV allows for comparison of the precision of different metrics, regardless of their scale, by indicating the degree of variability in relation to the mean.
Sample Size (N) are the number of observations or respondents included in the survey. A larger sample size generally leads to more precise estimates, reducing the standard error and margin of error. It is a fundamental determinant of the precision of survey results.

Alphabetic	CV	Interpretation
A.	0.0% - 0.5%	Reliable enough for most purposes
B.	0.6% - 1.0%	
C.	1.1% - 2.5%	
D.	2.6% - 5.0%	
E.	5.1% - 10.0%	
F.	10.1 %- 16.5%	
G.	16.6% - 25.0%	Use with caution
H.	25.1% - 33.4%	
I.	+33.5%	Data not published

Measures of precision for number of overnight trips
n=Total Overnight Trips (Weighted)

Variable	n=	Mean	95% Confidence Interval		Standard Error	Coefficient of Variation
Number of nights spent away from home	9 232 800	3.9	3.9	3.9	0.0	0.0
TSpend	9 232 800	R3 223	R3 220	R3 226	1.6	0.1

SAMPLING

Sampling Methodology

A stratified multistage random sample design are used to draw the sample of EAs to ensure the selected sample is representative of the adult (aged 18 years and older) population in South Africa. Geographical area (metro urban, non-metro urban, rural), province and dominant population group are considered as the explicit stratification variables while variables such as district municipality, local municipality, main place, sub-place and EA code are used as implicit stratification variables to improve the representativeness of the sample.

The EAs are the primary sampling units (psus), households the secondary sampling units (ssus) and a person aged 18 years or older the ultimate sampling unit (usu). The number of households per EA is used as the measure of size.

Sample Size and Allocation

For an optimal allocation of the sample size to the different strata, the population sizes within a stratum are important to consider. Because of the large differences in the population sizes between the strata, it is meaningful to deviate from proportional allocation. The power allocation rule, a disproportional allocation technique, between equal and proportional allocation, that is applied internationally, is used to determine the number of EAs (and thus sample size) needed to be drawn per stratum. The aim of using the power allocation rule is to decrease somewhat the allocation of EAs to the larger strata and to increase somewhat the allocation to the smaller strata. Hence, with this technique, one can ensure, as far as the overall sample size allows you, that the sample sizes are large enough in each stratum to represent the different geographical areas, provinces and different population groups within the sampling frame.

Selection of the EAs

The EAs for each of the above explicit strata are ordered according to the district municipality, local municipality, main place, sub-place and EA code upon which the predetermined number of EAs are drawn using pps (i.e. probability proportional to size) systematic sampling with the number of households per EA as the measure of size. The statistical program SAS is used to draw the sample of EAs.

METHODOLOGY

The Domestic Tourism Survey is a national survey designed to interview individuals aged 18 years and older from selected households, in accordance with the sampling procedure. Only respondents who have been interviewed for the same survey in the past 12 months are excluded from participation. Each selected household member is asked to provide detailed information about their travel, both day trips and night trips, from the previous month.

Tablet-Assisted Personal Interviewing (TAPI) is used in the data collection for the Domestic Tourism survey. The interviewing via TAPI captures the geographic coordinates of the exact location of the interview, ensuring location accuracy for the survey data. The survey is available in five official languages for the respondent to select from at the start of the interview. All open-ended answers are recorded in the chosen language and then coded for analysis purposes.

Household selection is based on a random sampling procedure. If no one is home at the selected dwelling or if the household refuses to participate, two call-backs are made before substituting the dwelling. All appointments are honoured before a dwelling can be substituted. Any substitution is done in consultation with the Field Supervisor.

Once the household has been selected, the person to be interviewed is determined by the Kish Grid. The Kish Grid ensures unbiased sampling when multiple eligible participants are present. Each eligible individual in the household is listed in the grid based on age. The interviewer then uses the grid to systematically select one person to answer the survey, ensuring each eligible individual has an equal chance of being chosen.

The target population for the SAT Domestic survey is the adult population of South Africa. The following criteria are used to filter the broad audience base of the respondents:

- Age: 18 years and older;
- Gender: males and females;
- Race: All racial groups; and
- Area: National, all 9 provinces

FIELDWORK

Interviews are conducted using the face-to-face in-home interviewing methodology. Tablet-Assisted Personal Interviews (TAPI) is used as it allows for real time dissemination of the data.

The quantitative questionnaire is programmed onto tablets using the Survey-to-go software. The programmed questionnaire is checked for accuracy by various departments prior to fieldwork commencement.

The questionnaire is piloted and tested extensively in field to ensure that it meets the requirements for comprehension, detailed data collection, and sound data processing/statistical analysis. A pilot debriefing session is conducted in close consultation with SAT prior to proceeding with the fieldwork.

Appropriately qualified and experienced interviewers are given a project-specific briefing and training prior to commencing fieldwork.

All face-to-face interviews are conducted in the respondent's language of choice, with 5 official languages to choose from, and the questionnaire is translated upfront to assure accuracy and consistency.

GIS mapping is used to select households that are to be interviewed in each EA. Replacement points are also provided. Interviewers only use the replacement points with approval from the field supervisor.

In the event of multiple households being are on a stand, the Kish Grid is used to randomly select the qualifying household, and then applied to select the respondent within a household.

All interviewers wear Plus 94 Research branded shirts and have name tags so that they are identifiable at all times. After each month's fieldwork, interviewers are required to attend a "de-briefing" session where project team members assess the difficulties/successes in field and also garner some of the more qualitative information that is useful, but not captured.

Plus 94 Research also conducts interviews after-hours or over weekends, depending on appointments made. Our field team has company vehicles at their disposal to transport our interviewers to interview locations and they also have procedures and protocols in place to ensure the safety of our interviewers and respondents.

As a quality checking measure, 20% of all the completed interviews are telephone backchecked. The tablets automatically capture accurate GPS coordinates at different points in the survey (e.g., at the beginning, middle and towards the end of the interview). These are used to check that interviews are conducted in the right areas. When Plus 94 Research updates the questionnaires, the client approves all changes before the new questionnaire is implemented.

WEIGHTING

Design weights

In order to obtain a representative sample of the population, a stratified multistage probability sample is designed as described above. Since the sample consists of three stages, the design weight of a household and respondent are calculated according to the inclusion probability of a unit at each stage.

First stage: In the first stage primary sampling units, i.e. the EAs, are selected with pps from the population sampling frame. Thus, the weight of an EA, i.e. the inverse of the inclusion probability of an EA, is given by

$$w_{EA} = \left(n_{PSU}\frac{EA_{MOS}}{POP_{MOS}}\right)^{-1},$$

where
$nPSU$ is the allocated number of EAs in the stratum;
$EAMOS$ is the measure of size (MOS), thus the number of households in a selected EA and
$POPMOS$ is the total MOS of all the EAs in the specific stratum.

Second stage: From each selected EA, the predetermined number of households are selected with equal probability. The household weight per psu is given by

$$w_{HH} = w_{EA}\left(\frac{n_{HH}}{EA_{HH}}\right)^{-1},$$

Third stage: In the final stage, a person aged 18 years or older is selected from the drawn household as a respondent. The respondent weight is given by

$$W_{PP} = W_{HH} * Av_{18+},$$

where
Av18+ is the average number of persons aged 18 years and older per household in the EA.
Since there are large differences regarding to the number of persons aged 18 years and older per household, which will cause too large deviation in the weights, the average number of persons aged 18 years and older in the households of an EA is used in the weighting process.

Calibration

For this study the design weights of the respondents are adjusted to compensate for differential non-response (i.e. under-representation of certain parts of the population). The design weights are benchmarked to the latest StatsSA 18 years and older population totals. The variables province, population group, age group and gender are used as benchmark variables.

APPENDIX

MONTHLY SHARES OF OVERNIGHT TRAVELLERS AND OVERNIGHT TRIPS

APPENDIX

		SHARE OF OVERNIGHT TRAVELLERS BY MONTH		
		Q2 2022	Q2 2023	Q2 2024
Month	April	31.9%	32.2%	27.2%
	May	30.8%	31.1%	32.4%
	June	37.4%	36.7%	40.4%

		SHARE OF OVERNIGHT TRIPS BY MONTH		
		Q2 2022	Q2 2023	Q2 2024
Month	April	31.8%	31.0%	27.8%
	May	29.7%	31.3%	31.7%
	June	38.5%	37.7%	40.5%

PURPOSE OF TRIP BY SOCIO_DEMOGRAPHICS PROFILING

APPENDIX

		SOCIO-DEMOGRAPHICS PROFILING BY PURPOSE					
		Q2 2022		Q2 2023		Q2 2024	
		VFR	Holiday	VFR	Holiday	VFR	Holiday
Highest level of education	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	No school	1.0%	0.0%	0.0%	1.2%	0.0%	0.0%
	Some primary school	0.3%	0.0%	14.8%	4.8%	9.2%	10.1%
	Primary school completed	15.0%	0.0%	2.6%	3.1%	1.3%	0.0%
	Some high school	31.6%	22.3%	21.0%	14.7%	14.4%	11.7%
	High school completed	36.1%	43.1%	35.1%	36.6%	46.3%	28.8%
	Some college	0.0%	4.3%	3.9%	3.2%	8.9%	5.0%
	College completed	8.2%	13.5%	6.5%	3.9%	8.8%	6.5%
	Some university	0.3%	3.2%	1.6%	4.4%	1.3%	2.9%
	Technicon diploma / degree	2.4%	3.6%	4.5%	3.9%	2.9%	13.1%
	University degree / diploma	3.7%	6.3%	6.3%	14.0%	3.9%	10.2%
	Post-graduate degree	1.4%	3.7%	3.7%	10.2%	3.1%	11.7%
Gender	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Male	40.6%	57.5%	49.8%	55.4%	57.0%	59.2%
	Female	59.4%	42.5%	50.2%	44.6%	43.0%	40.8%
Marital Status	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Single, never married	55.7%	68.8%	46.4%	49.3%	57.7%	66.4%
	Married or living together	40.8%	23.7%	34.7%	44.2%	38.1%	29.3%
	Divorced / widowed / separated	3.5%	7.5%	18.9%	6.5%	4.2%	4.3%
Family Situation	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Do not have children	20.9%	39.4%	31.6%	27.8%	22.1%	31.7%
	Have children who are dependent	64.6%	49.8%	45.4%	56.8%	54.2%	56.6%
	Have children who are not dependent	13.8%	7.4%	17.9%	9.8%	20.9%	10.3%
	Have children, some dependent others not	0.7%	3.4%	5.1%	5.6%	2.9%	1.4%
Personal Monthly Income	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	R1 - R500	5.6%	9.9%	8.1%	4.7%	6.5%	11.3%
	R 501 - R750	2.6%	7.8%	2.3%	1.6%	2.6%	2.8%
	R 751 - R1000	2.8%	0.5%	7.5%	3.7%	2.7%	1.5%
	R1001 - R1500	9.3%	14.1%	0.5%	4.4%	6.9%	4.9%
	R1501 - R2000	20.2%	2.4%	9.2%	7.0%	7.9%	3.5%
	R2001 - R3000	12.4%	3.7%	22.0%	15.4%	22.2%	8.8%
	R3001 - R5000	12.8%	5.5%	19.7%	2.9%	5.8%	6.6%
	R5001 - R7500	5.5%	10.2%	5.1%	12.8%	11.9%	6.6%
	R7501 - R10 000	1.5%	7.3%	2.2%	10.0%	8.2%	12.2%
	R10 001 - R15 000	6.2%	5.2%	8.9%	8.3%	2.9%	6.1%
	R15 001 - R20 000	4.4%	13.2%	3.8%	8.8%	4.6%	13.2%
	R20 001 - R30 000	2.0%	0.5%	2.5%	4.5%	4.2%	7.9%
	R30 001 +	2.0%	9.4%	6.7%	8.7%	2.3%	5.9%
	Refuse to answer	5.1%	7.9%	0.5%	4.9%	5.7%	3.1%
	Don t know / uncertain	0.0%	0.2%	0.1%	2.1%	1.9%	1.0%
	No income	7.8%	2.2%	0.9%	0.2%	3.6%	4.7%
Age Group	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	18 to 24	20.6%	20.4%	14.3%	14.0%	19.6%	18.5%
	25 to 34	19.6%	24.0%	20.1%	34.2%	20.0%	31.8%
	35 to 44	30.7%	39.3%	19.2%	22.3%	42.3%	24.5%
	45 to 54	12.5%	5.8%	16.9%	11.9%	6.5%	14.7%
	55+	16.6%	10.5%	29.5%	17.6%	11.7%	10.5%

TRIPS BY SOCIO_DEMOGRAPHICS PROFILING

APPENDIX

		OVERNIGHT TRIPS BY SOCIO-DEMOGRAPHICS PROFILING		
		Q2 2022	Q2 2023	Q2 2024
Highest level of education	Total	100.0%	100.0%	100.0%
	No school	2.6%	0.3%	0.0%
	Some primary school	9.2%	10.2%	7.7%
	Primary school completed	7.4%	2.4%	2.1%
	Some high school	25.4%	17.6%	15.4%
	High school completed	36.3%	38.0%	37.3%
	Some college	2.6%	3.1%	6.8%
	College completed	6.4%	4.6%	9.0%
	Some university	1.3%	3.0%	1.9%
	Technicon diploma / degree	2.8%	5.4%	6.7%
	University degree / diploma	4.6%	10.4%	6.4%
	Post-graduate degree	1.4%	5.1%	6.7%
Gender	Total	100.0%	100.0%	100.0%
	Male	48.9%	54.1%	55.3%
	Female	51.1%	45.9%	44.7%
Marital Status	Total	100.0%	100.0%	100.0%
	Single, never married	58.1%	48.7%	62.3%
	Married or living together	33.3%	40.4%	33.0%
	Divorced / widowed / separated	8.6%	10.9%	4.7%
Family Situation	Total	100.0%	100.0%	100.0%
	Do not have children	26.6%	27.5%	29.1%
	Have children who are dependent	56.0%	51.5%	56.0%
	Have children who are not dependent	16.3%	16.6%	12.7%
	Have children, some dependent others not	1.2%	4.4%	2.2%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	5.8%	7.5%	9.4%
	R 501 - R750	3.7%	1.5%	2.6%
	R 751 - R1000	5.6%	4.7%	3.7%
	R1001 - R1500	10.1%	3.3%	5.6%
	R1501 - R2000	20.0%	7.7%	5.0%
	R2001 - R3000	10.8%	18.3%	15.3%
	R3001 - R5000	8.0%	12.2%	8.9%
	R5001 - R7500	7.4%	11.1%	8.7%
	R7501 - R10 000	2.5%	5.3%	9.7%
	R10 001 - R15 000	4.4%	8.2%	3.7%
	R15 001 - R20 000	5.0%	5.7%	7.4%
	R20 001 - R30 000	3.6%	4.3%	5.7%
	R30 001 +	3.2%	6.3%	5.5%
	Refuse to answer	4.8%	2.3%	4.4%
	Don t know / uncertain	0.3%	0.7%	1.3%
	No income	4.9%	0.9%	3.1%
Age Groups	Total	100.0%	100.0%	100.0%
	18 to 24	17.1%	13.9%	19.9%
	25 to 34	20.8%	26.0%	26.5%
	35 to 44	25.1%	22.7%	31.6%
	45 to 54	14.4%	13.8%	11.8%
	55+	22.6%	23.7%	10.3%

APPENDIX

		DAY TRIPS BY SOCIO-DEMOGRAPHICS PROFILING		
		Q2 2022	Q2 2023	Q2 2024
Highest level of education	Total	100.0%	100.0%	100.0%
	No school	1.6%	0.4%	0.8%
	Some primary school	5.5%	2.9%	7.7%
	Primary school completed	2.5%	3.5%	4.2%
	Some high school	28.9%	25.5%	24.5%
	High school completed	43.1%	42.2%	37.7%
	Some college	3.9%	4.2%	3.9%
	College completed	4.5%	4.7%	7.0%
	Some university	1.3%	5.1%	1.2%
	Technicon diploma / degree	2.8%	4.0%	5.3%
	University degree / diploma	5.0%	5.0%	4.6%
	Post-graduate degree	0.9%	2.5%	3.1%
Gender	Total	100.0%	100.0%	100.0%
	Male	51.4%	55.5%	56.5%
	Female	48.6%	44.5%	43.5%
Marital Status	Total	100.0%	100.0%	100.0%
	Single, never married	67.5%	62.8%	55.9%
	Married or living together	27.2%	28.2%	33.9%
	Divorced / widowed / separated	5.3%	9.0%	10.2%
Family Situation	Total	100.0%	100.0%	100.0%
	Do not have children	27.0%	26.9%	28.6%
	Have children who are dependent	59.5%	54.8%	52.8%
	Have children who are not dependent	11.5%	13.9%	15.5%
	Have children, some dependent others not	2.0%	4.4%	3.2%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	11.3%	7.5%	8.0%
	R 501 - R750	4.8%	4.0%	2.4%
	R 751 - R1000	5.8%	4.9%	3.6%
	R1001 - R1500	8.6%	7.3%	2.9%
	R1501 - R2000	12.0%	13.7%	6.6%
	R2001 - R3000	8.7%	12.2%	19.3%
	R3001 - R5000	12.5%	12.8%	11.5%
	R5001 - R7500	7.1%	5.6%	9.9%
	R7501 - R10 000	3.3%	7.6%	6.6%
	R10 001 - R15 000	3.8%	6.5%	8.2%
	R15 001 - R20 000	3.7%	3.1%	5.2%
	R20 001 - R30 000	2.7%	2.7%	5.4%
	R30 001 +	2.0%	3.4%	3.3%
	Refuse to answer	9.1%	2.8%	3.7%
	Don t know / uncertain	0.8%	1.2%	0.8%
	No income	3.8%	4.7%	2.6%
Age Groups	Total	100.0%	100.0%	100.0%
	18 to 24	17.8%	22.0%	18.3%
	25 to 34	30.9%	27.8%	25.4%
	35 to 44	23.7%	23.9%	22.9%
	45 to 54	13.1%	12.1%	12.1%
	55+	14.4%	14.2%	21.3%

SHARES OF TRANSPORT TYPE USED TO TRAVEL TO DESTINATION

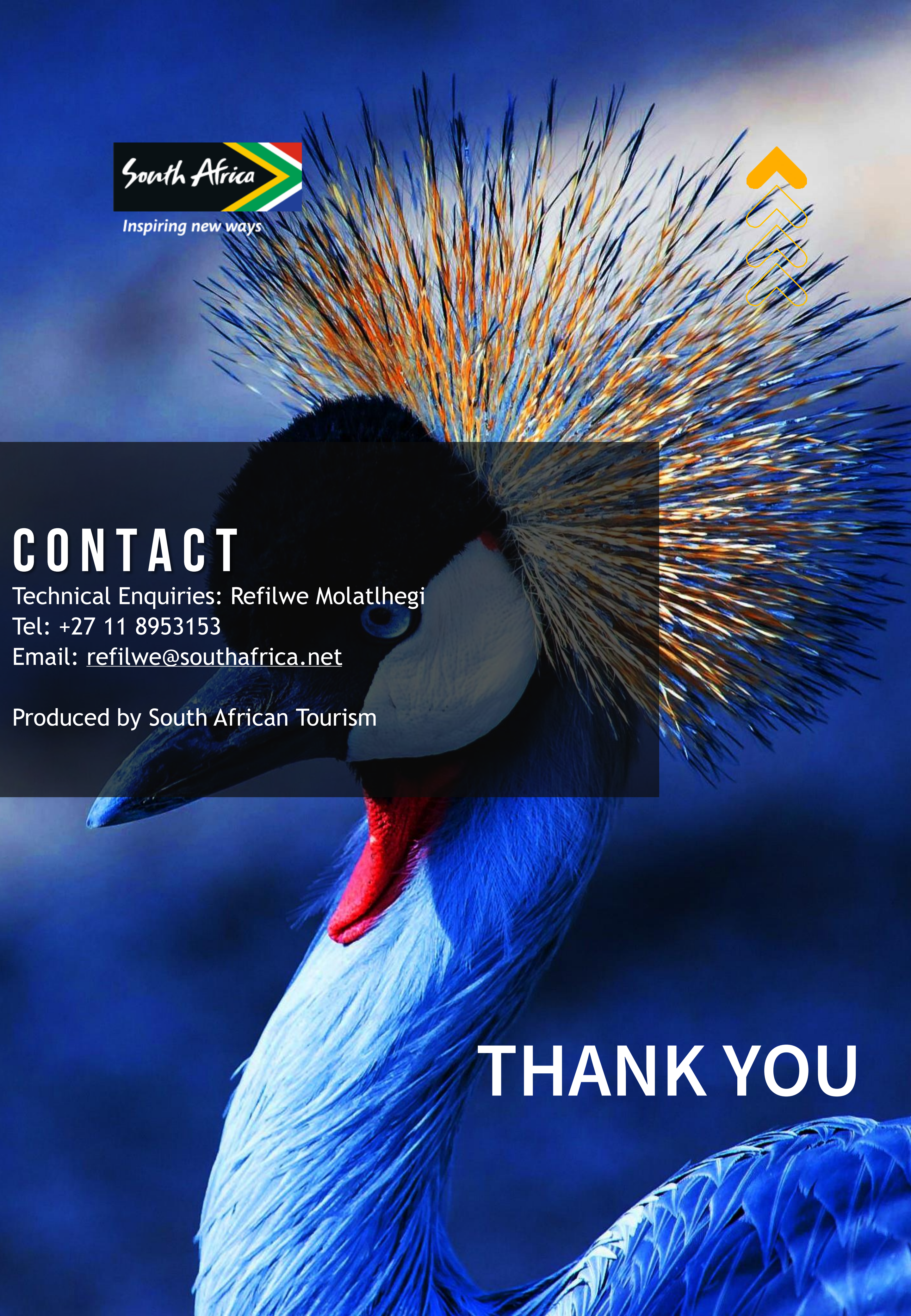
APPENDIX

		SHARE OF TRANSPORT TYPE		
		Q2 2022	Q2 2023	Q2 2024
Main transport to get to Destination	Minibus taxi	39.6%	34.4%	40.2%
	My own car / van / bakkie	26.2%	25.5%	24.3%
	Someone else s car / van / bakkie	17.2%	22.9%	18.3%
	Commercial bus	2.2%	3.0%	4.8%
	Aeroplane	1.4%	2.6%	2.9%
	Metered taxi	3.2%	1.8%	2.9%
	App-based cabs (Uber, Taxify, etc.) Scoop A Cab	0.4%	2.4%	2.5%
	Other (Ship / boat) Specify	1.1%	1.1%	1.6%
	Rental car	2.3%	2.3%	0.9%
	Truck or lorry	0.3%	1.3%	0.8%
	Motorcycle	1.8%	0.5%	0.6%
	Tour bus	4.2%	1.5%	0.3%
	On foot or bicycle	0.0%	0.8%	0.0%
	Train	0.0%	0.0%	0.0%
	Ship / boat	0.0%	0.0%	0.0%
	Total	**100.0%**	**100.0%**	**100.0%**

SHARES OF BEDNIGHTS BY ACCOMMODATION TYPE

APPENDIX

		SHARE OF TOTAL BEDNIGHTS		
		Q2 2022	Q2 2023	Q2 2024
Accommodation Type	Friends/family	69.1%	73.3%	74.9%
	Hotels	6.3%	5.0%	6.7%
	Guest House	9.2%	5.8%	6.4%
	Self catering	1.5%	2.9%	3.3%
	Lodge	2.0%	3.2%	2.7%
	Bed and Breakfast	2.0%	3.4%	1.3%
	Hospital	0.3%	0.2%	0.8%
	Camping	0.0%	0.7%	0.7%
	Halls	0.7%	0.3%	0.7%
	AirBnB	0.2%	0.5%	0.2%
	Holiday Home	5.3%	2.1%	0.2%
	Backpacker	2.2%	0.0%	0.0%
	Other Accommodation	1.2%	2.4%	2.1%
	Total	**100.0%**	**100.0%**	**100.0%**



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THANK YOU