South Africa

Inspiring new ways

OCT - DEC

2024

# DOMESTIC TOURISM

## QUARTERLY PERFORMANCE REPORT

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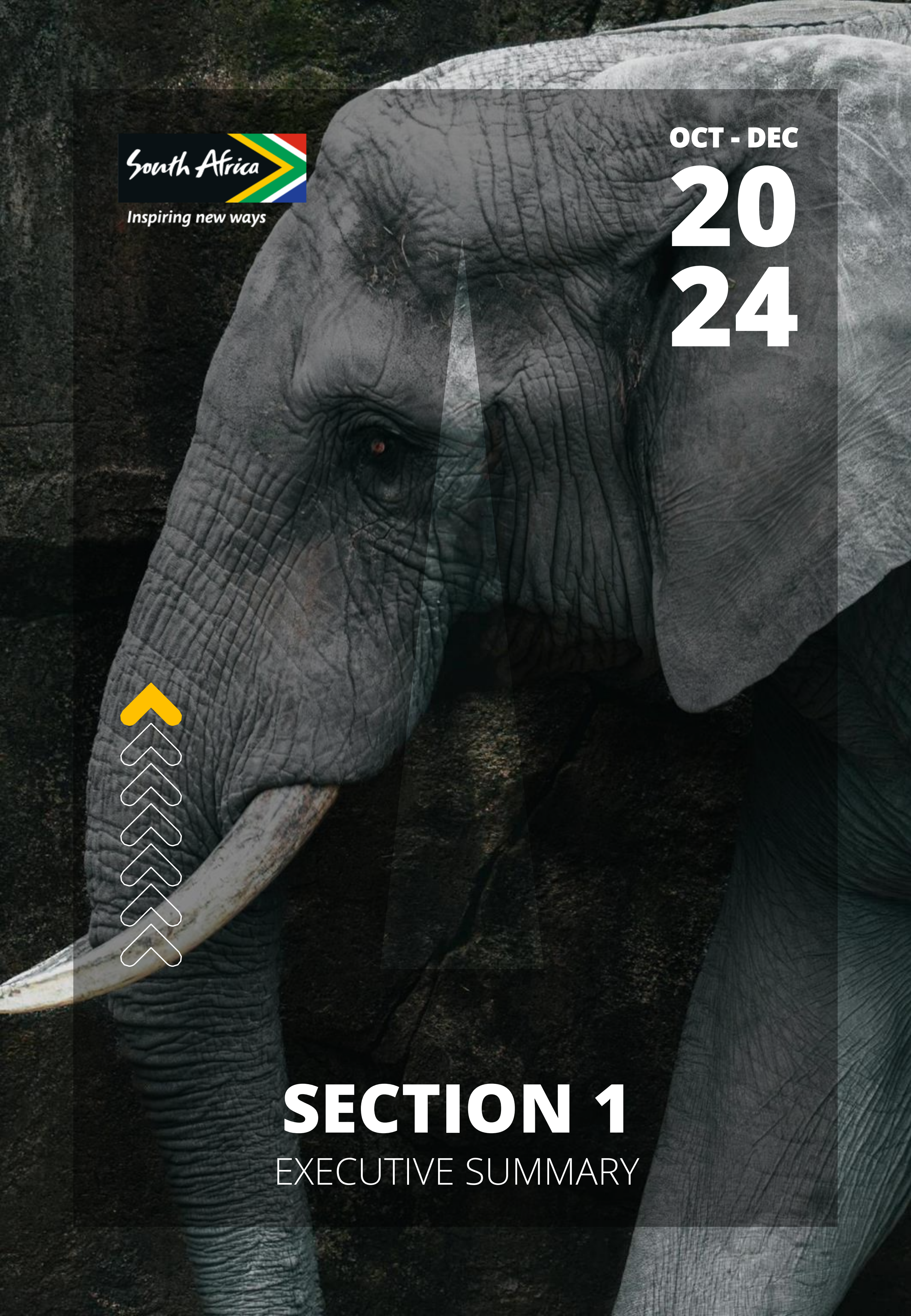

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# SECTION 1
EXECUTIVE SUMMARY

# EXECUTIVE SUMMARY

Domestic overnight trips increased to 10.9-million in Q4 2024, marking a strong 7.9% year-on-year growth. Sustained figures exceeding 10-million since Q4 2022 indicate a continued recovery in travel demand.

The number of domestic tourists grew by 8.3%, reaching 9.7-million, up from 9.0-million in Q4 2023. This also exceeded the 9.2-million recorded in Q4 2022. The average number of trips per domestic tourist remained constant at 1.1, consistent with previous years for the same quarter.

## DOMESTIC OVERNIGHT OVERVIEW

Holiday (38.4%) and VFR (40.5%) are almost equally the top reasons for overnight trips in the fourth quarter of 2024, with the share of VFR showing an increase from 35.9% in Q4 2023. Trips for religious purposes have also seen a slight upward trend from Q4 2022 to Q4 2024.

The VFR category of domestic travel grew considerably in Q4 2024, with increases in total trips, total spending (R 12.2-billion), and bed nights. More trips and longer stays drove this expansion, despite a slight decline in average spending per trip. Total spending on holiday trips also experienced significant growth, reaching R25.5-billion, with an average spend per trip of R6,101 and 21.4-million bed nights. There are indications that the MICE sector continues to grow steadily, with the average spend per trip increasing by 24.2% to R7,456.

Domestic overnight spending is showing an upward year-on-year trend, increasing from R32.2-billion in Q4 2022, to R38.6-billion in Q4 2023, and reaching R49-billion – a growth of 24.3% in Q4 2024. Holiday spending accounted for 53.2% of total spending. Total overnight spending in the religious category grew by 56.3%, rising from R831.6-million to R1.3-billion.

Average domestic spending increased by 15.2% in Q4 2024, reaching R4,401 up from R3,820 in Q4 2023. Average domestic overnight spending rose for Holiday (+25.9%) and MICE (+24.2%). Holiday spending increased to an average of R6,101, while MICE spending reached R7,456.

Bednights rose substantially by 46.6%, increasing from 34.3-million to 50.3-million, surpassing the Q4 2022 level of 38.2-million bednights. The average length of stay also saw a substantial increase of 35.9%, rising from 3.4 nights to 4.6 nights.

Spending in Accommodation, Personal Shopping, and Leisure & Entertainment all saw substantial growth. Accommodation spending grew from R4.4-billion to R8.4-billion, Personal Shopping increased from R4.2-billion to R7.9-billion, and Leisure & Entertainment rose from R1.0-billion to R2.9-billion. This shift indicates an increasing consumer emphasis on discretionary spending, despite declines in essential categories such as transportation and food.

*Continued...*

# EXECUTIVE SUMMARY

## PROVINCIAL DOMESTIC OVERNIGHT

This quarter, KwaZulu-Natal, Gauteng, and the Western Cape emerged as the best-performing main destination provinces.

KwaZulu-Natal was the most visited province, recording the highest number of domestic overnight trips (2.6 million), the highest total overnight spend (R12.3 Billion), and the second-highest number of bednights (9.5 million). Total overnight spend increased by 92.2% in Q4 2024, following a 116.9% rise in Q4 2023.

Although Gauteng experienced a 9% decline in domestic overnight trips in Q4 2024, it and the Western Cape were the second-most visited destination provinces, each recording approximately 1.5 million domestic overnight trips. Gauteng also led in total bednights, from 5.8 million to 10.9 million.

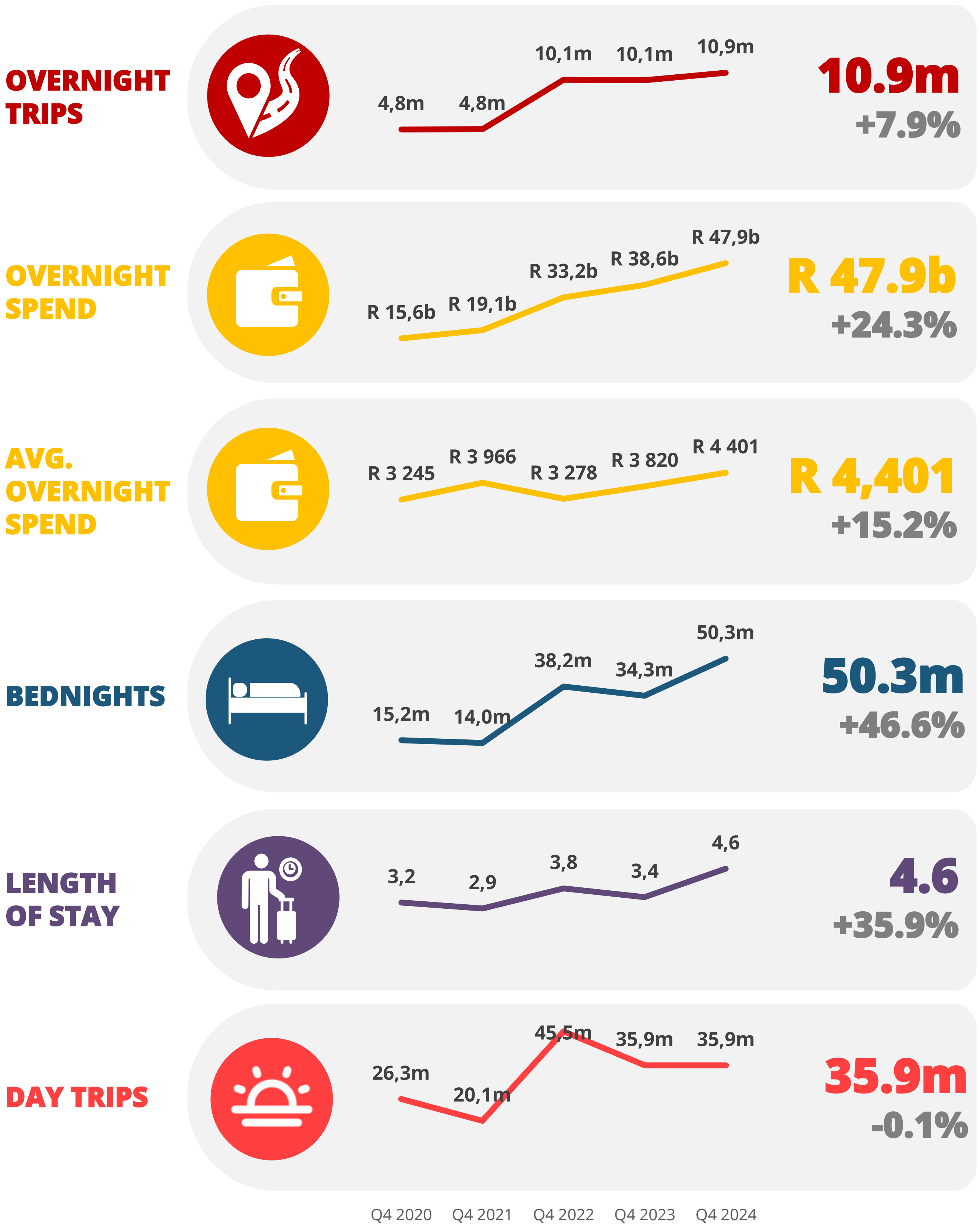
The Western Cape experienced substantial growth, with increases of 158.2% in overnight trips, 214.8% in overnight spending, and 94% in bed nights. Bednights rose from 2.5 million to 4.9 million.

The like Province also saw significant growth. The number of trips increased by 226.0% to 949k (up from 291k). Total spend rose 142.5% to R4.9 billion, while average spend increased 84.8% to R5,201 (up from ZAR 2,814). Total bednights grew from 2.1 million to 5.1 million.

## DOMESTIC DAY TRIPS

Domestic day trips totalled 35.9 million, like the number recorded in Q4 2023. Holidays and personal shopping remained the primary reasons for day trips, though both experienced slight declines in this quarter. Business-related travel experienced the largest drop, falling from 4.5 million to 2.4-million-day trips.

# HEADLINE INDICATORS



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# SECTION 2

ABOUT THE REPORT

# OBJECTIVES OF THE SURVEY

The Domestic Tourism Survey (DTS) is a large-scale household survey designed to collect accurate statistics on the travel behaviour and expenditure of South African residents travelling within the country's borders.

Since 2007, South African Tourism has commissioned a monthly household survey of South African residents aged 18 and older to measure key indicators of domestic tourism.

The following key indicators are measured:

- **Volume:** the incidence of domestic travel and how many trips are taken
- **Value:** how much is spent by domestic tourists
- **Number of bednights:** The number of nights spent in various establishments
- **Provincial distribution:** How the volume, value, and bednights are distributed between the nine provinces
- **Seasonality:** When do people travel?
- The survey is designed to cover three categories of respondents, namely: a) non-travellers in the past 12 months, b) travellers in the past 12 months, and c) travellers in the past month.

## OBJECTIVES

The DTS aims to measure the value and volume of domestic tourism in South Africa and to understand domestic travel behaviour. The key objectives of the survey are to:

- Determine the incidence of travel among the adult population.
- Quantify trips taken by travellers over a 12-month period.
- Understand the timing of trips to specific provinces.
- Measure the average length of stay per trip.
- Understand the usage of provincial facilities, such as accommodation, transport and tourist attractions.
- Measure satisfaction with various provincial facilities and overall friendliness and efficiency of the provincial Tourism product.
- Determine an approximate value of the trips, taking all trip-related expenditures into account.
- Identify the reasons for travelling and not travelling.
- Identify the incidence of province choice and reasons for choosing that province.

# 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 / Source Province:** The province or region where domestic tourists reside before embarking on their trip.

**Main Purpose:** 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.

# DOMESTIC TOURISM STATISTICS

Data for the Domestic Travel Survey is collected using a structured questionnaire that is administered through a face-to-face interview in the respondent's home.

The sampling frame is generated from a top down and bottom-up approach. The top-down approach utilises the Stats SA 2011 Census information and latest mid-year estimate data, and the bottom-up approach uses the GTI national Building Census (structure/dwelling unit type) dataset.

The sample was designed in accordance with previous DTS surveys and sample frame:

- Multi-stage, stratified probability sample, representative of all SA adults aged 18 years and older.
- Stratified by Province, Race, Geographic areas (Metro, Urban, and Rural), EA Type, Main Place and Sub-place.

The sample was drawn using a stratified multistage probability sample based on three random selection elements: (i) enumerator areas (EAs) as primary sampling units (PSUs), (ii) dwellings/households as the secondary sampling units (SSUs) and (iii) adult household members 18+ years as ultimate sampling units (SSUs).

In each EA drawn, four households are systematically selected with equal probability, while the EAs are disproportionately allocated across the main strata to ensure sufficient representation of domestic tourism from smaller provinces.

The sample consists of 1,300 persons aged 18 years and above, per month.

The monthly sample was re-weighted to the SA population aged 18 years and older. Sample weighting is achieved using the latest mid-year estimates from Stats SA, and by use of various weighting techniques.

# ADDITIONAL SOURCES

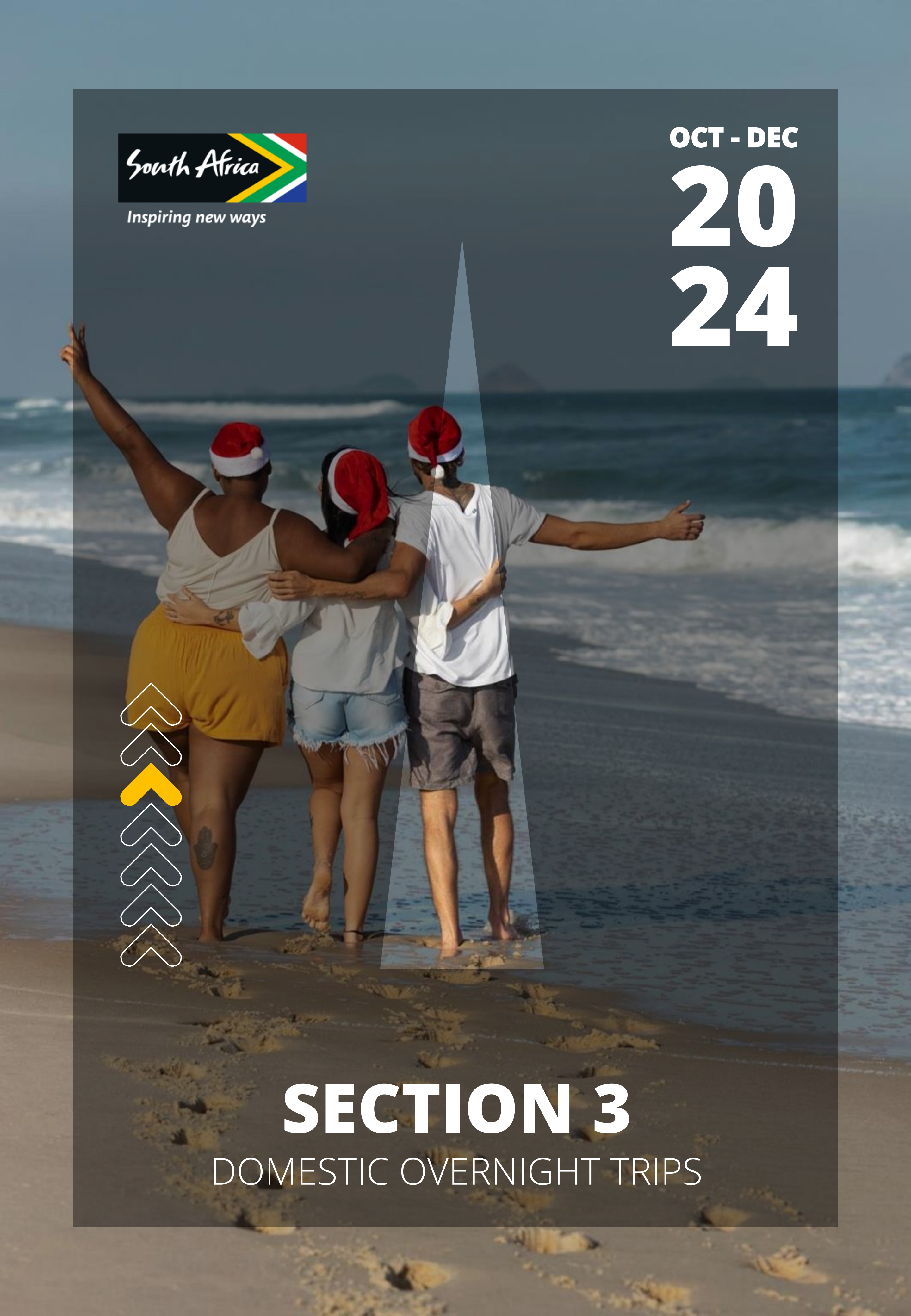

- Statistical Release P0141: Consumer Price Index. December 2024. Statistics South Africa.
- Statistical Release P0141: Consumer Price Index. November 2024. Statistics South Africa.
- Statistical Release P0141: Consumer Price Index. October 2024. Statistics South Africa.
- Statistical Release P0441: Gross Domestic Product – Third quarter 2024. 03 December 2024. Statistics South Africa.
- Statistical Release P6410: Tourist accommodation (Preliminary). December 2024. Statistics South Africa.
- Statistical Release P6410: Tourist accommodation (Preliminary). November 2024. Statistics South Africa.
- Statistical Release P6410: Tourist accommodation (Preliminary). October 2024. Statistics South Africa.
- Media Release: Quarterly Labour Force Survey (QLFS) – Q4: 2024. 18 February 2025. Statistics South Africa.

# DISCLAIMER

South African Tourism's Strategy, Insights, and Analytics unit (SIA) makes every effort to publish reports that are error-free. With the large number of complex records analysed, we cannot guarantee that all reports are entirely free of error.

Any detected errors 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.



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# SECTION 3

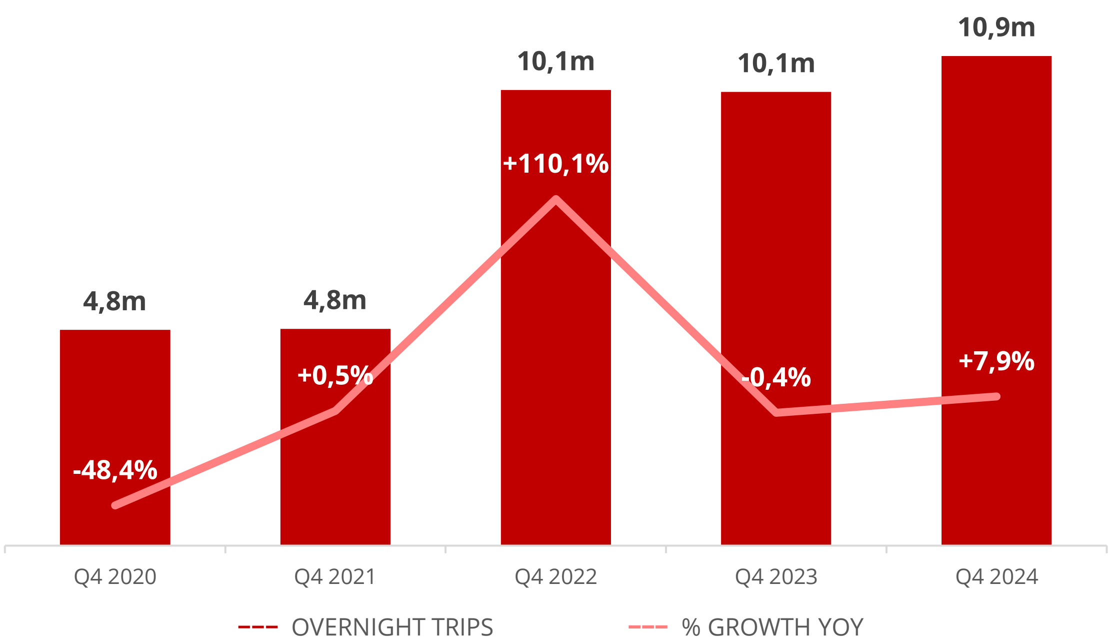
## DOMESTIC OVERNIGHT TRIPS

## OVERNIGHT TRIPS 10.9m +7.9%

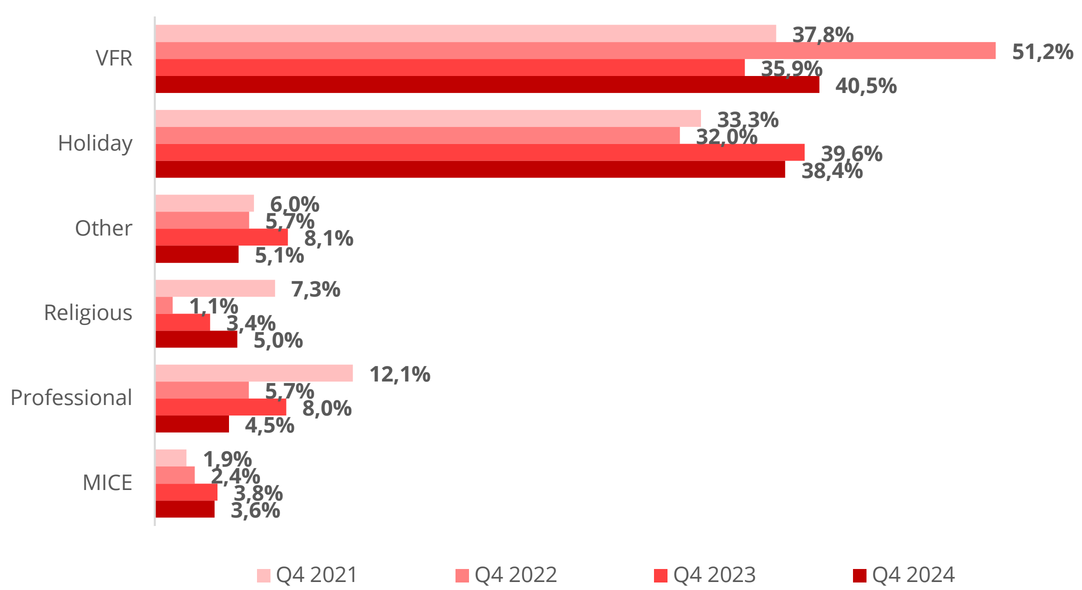
Domestic overnight trips rose to 10.9 million in Q4 2024, reflecting a strong year-on-year growth of +7.9%. The consistency of reaching 10-million overnight trips since Q4 2022 suggests a recovery in travel demand.

Holiday (38% in Q4 2024) and VFR (40% in Q4 2024) are nearly neck-and-neck as the main purposes for overnight trips, with VFR showing an increase from its 36% share in Q4 2023. Trips for religious purposes are showing a marginal upward trend from Q4 2022 to Q4 2024 (from a share of 1% to 3%, and now 5% in Q4 2024).

### OVERNIGHT TRIPS: Q4 2020 – Q4 2024




### SHARE OF OVERNIGHT TRIPS BY PURPOSE: Q4 2020 – Q4 2024



## OVERNIGHT TRIPS 10.9m +7.9%

| VFR | HOLIDAY | MICE |
|---|---|---|
| 4.4m +21.5% | 4.2m +4.7% | 397k +2.9% |
| R 12.2b +15.2% | R 25.5b +31.8% | R 3.0b +27.8% |
| R 2,770 -5.2% | R 6,101 +25.9% | R 7,456 +24.2% |
| 19.5m +27.2% | 21.4m +64.0% | 1.2m +168.5% |
| 4.4 +4.7% | 5.1 +56.7% | 3.1 +160.9% |
| 40.5% +12.6% | 38.4% -3.0% | 3.6% -4.6% |

The VFR category showed strong growth in terms of total trips, total spend, and bednights. VFR is expanding, with more trips and longer stays, even though the average spending per trip has decreased slightly.

The number of VFR trips increased by 21.5%, reaching 4.4-million in Q4 2024 compared to 3.6-million in Q4 2023.

Total spend rose by 15.2% to R12.2-billion, but the average spend per trip decreased slightly by 5.2% to R2,770.

The number of bednights increased by 27.2% to 19.5-million in Q4 2024. The average length of stay also showed a slight increase, growing from 4.2 nights to 4.4 nights during the same period.

Although the holiday category's share of total trips declined by 3% to 38.4% in Q4 2024, the overall performance of the category continues to show strong growth. This is clear from the substantial increases in total trips, total spend, average spend per trip, bednights, and length of stay.

Total spend on holiday trips experienced significant growth, from R19.4-billion (Q4 2023) to R25.5-billion (Q4 2024), while the average spend per trip also rose by 25.9%, from R4,845 to R6,101.

Bednights saw a substantial increase of 64%, from 13.1-million to 21.4-million, and the length of stay also saw a significant increase of 56.7% to 5.1 nights (compared to the previous year).

MICE accounted for 3.6% of total domestic trips in Q4 2024. There are indications that the category continues to grow steadily, especially with regard to the increase in bednights and length of stay, which, in turn, positively impacts total spend, and average spend per trip.

Total spending continued its upward trend, with a notable increase of 27.8% from R2.3-billion in Q4 2022 to R3.0-billion in Q4 2024. The average spend per trip also increased by 24.2%, reaching R7 456.

The most significant growth was in terms of bednights (+168.5%) and length of stay (+160.9%), which improved to 1.2-million nights and 3.1 nights respectively.

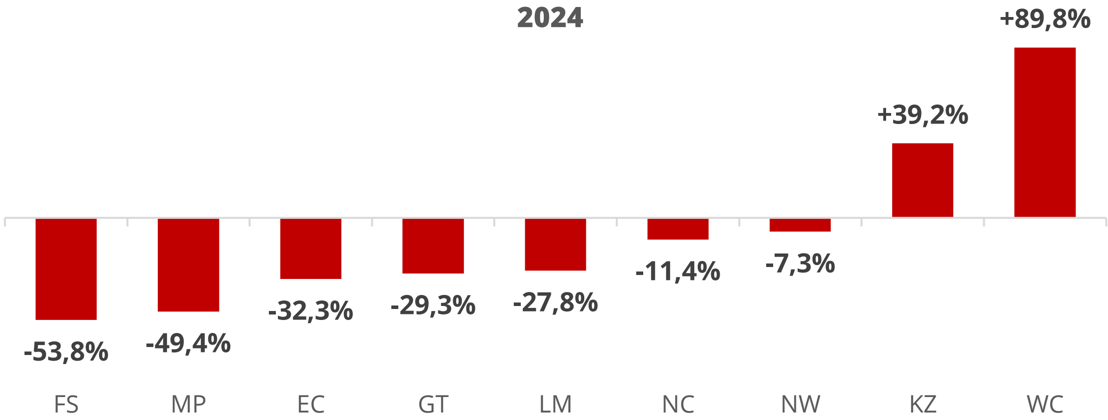
# OVERNIGHT TRIPS 10.9m +7.9%

Most provinces experienced a decline in the destination province growth compared to Q4 2023. The Free State (-53.8%) and Mpumalanga (-49.4%) experienced the largest declines. The Eastern Cape (-32.3%), Gauteng (-29.3%), and Limpopo Province (-27.8%) also saw substantial declines.

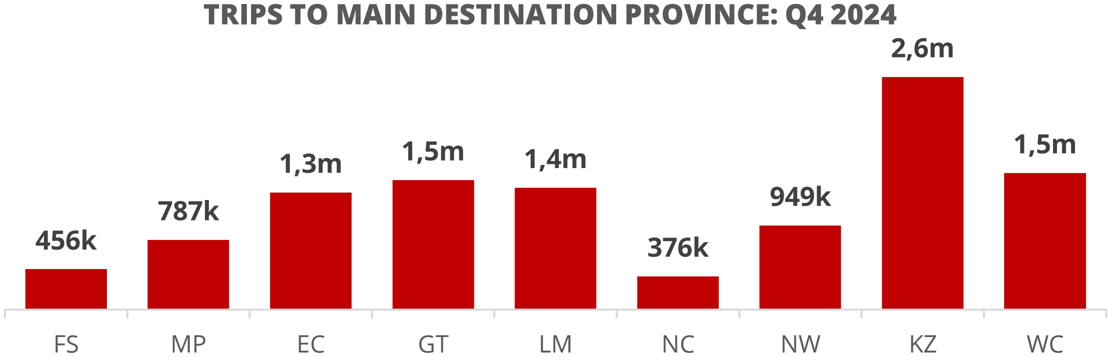
KwaZulu-Natal and the Western Cape were the only provinces with significant growth. The Western Cape experienced a remarkable 89.8% increase, followed by KwaZulu-Natal with a 39.2% rise. KwaZulu-Natal, the recipient of the highest number of trips in Q4 2024, saw an increase from 1.9-million to 2.6-million, continuing its upward trend since Q4 2022.

The Free State, which experienced the largest decline, is also showing a negative growth trend, with the number of trips decreasing from 1.2-million (Q4 2022) to 988k (Q4 2023) and further down to 456k (Q4 2024). A similar trend emerges for Gauteng, where trips to the province declined from 2.7-million (Q4 2022) to 1.5-million (Q4 2024).

## MAIN DESTINATION PROVINCE GROWTH RATE: Q4 2023 v Q4 2024




## TRIPS TO MAIN DESTINATION PROVINCE: Q4 2024




## TRIPS TO DESTINATION PROVINCE: Q4 2022 – Q4 2024

| | FS | MP | EC | GT | LM | NC | NW | KZ | WC |
|---|---|---|---|---|---|---|---|---|---|
| **Q4 2022** | 1.2m | 1.0m | 1.7m | 2.7m | 2.2m | 236k | 856k | 1.4m | 903k |
| **Q4 2023** | 988k | 1.6m | 2.0m | 2.1m | 1.9m | 424k | 1.0m | 1.9m | 812k |
| **Q4 2024** | 456k | 787k | 1.3m | 1.5m | 1.4m | 376k | 949k | 2.6m | 1.5m |

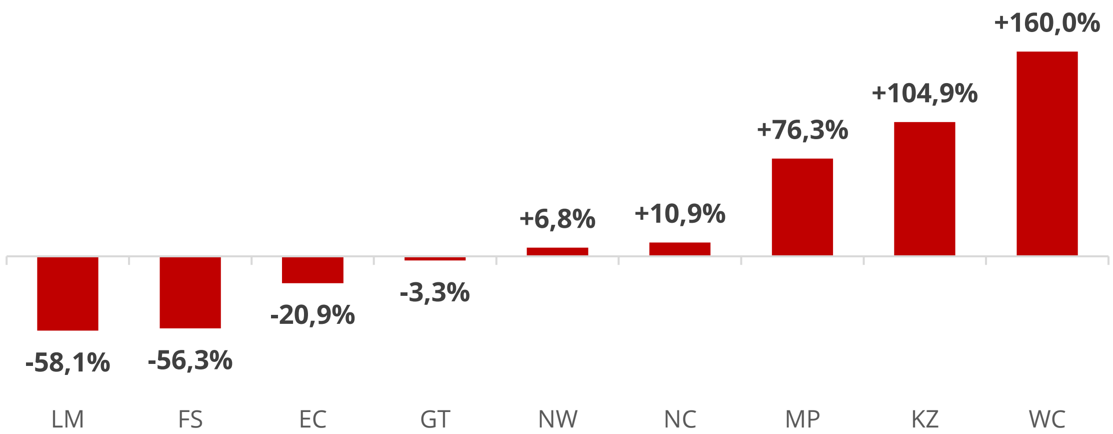
## OVERNIGHT TRIPS 10.9m +7.9%

In Q4 2024, the Western Cape, KwaZulu-Natal, and Mpumalanga all had very high source province growth rates of 160%, 104.9%, and 76.3%, respectively, compared to Q4 2023. The Northern Cape and North West experienced moderate growth rates.

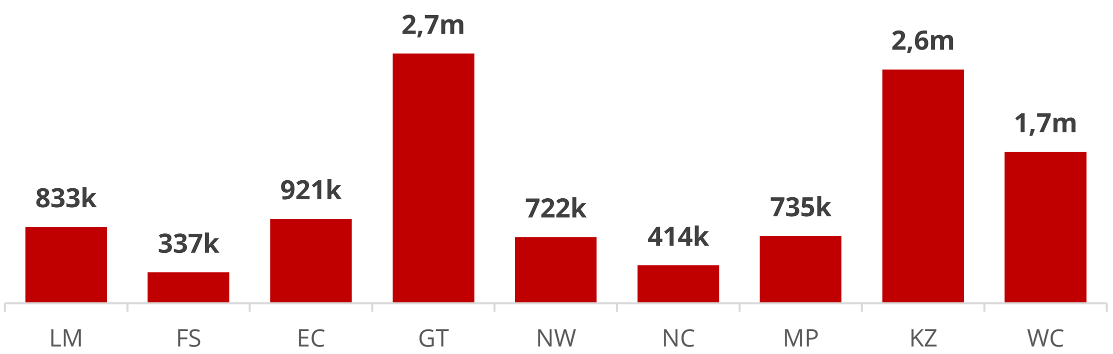
Limpopo (-58.1%) and Free State (-56.3%) experienced the steepest declines in growth as source provinces compared to Q4 2023. The Eastern Cape saw a moderate decline, while Gauteng experienced a small drop as a source province.

Gauteng and KwaZulu-Natal, with 2.7-million and 2.6-million overnight trips, respectively, are the major source provinces for overnight trips, followed by the Western Cape with 1.7-million trips. Despite having a small base, the Northern Cape is showing an upward trend as a source province for trips, increasing from 198k in Q4 2022, to 373k in Q4 2023, and 414k in Q4 2024.

### SOURCE PROVINCE GROWTH RATE: Q4 2023 v Q4 2024




### TRIPS FROM SOURCE PROVINCE: Q4 2024



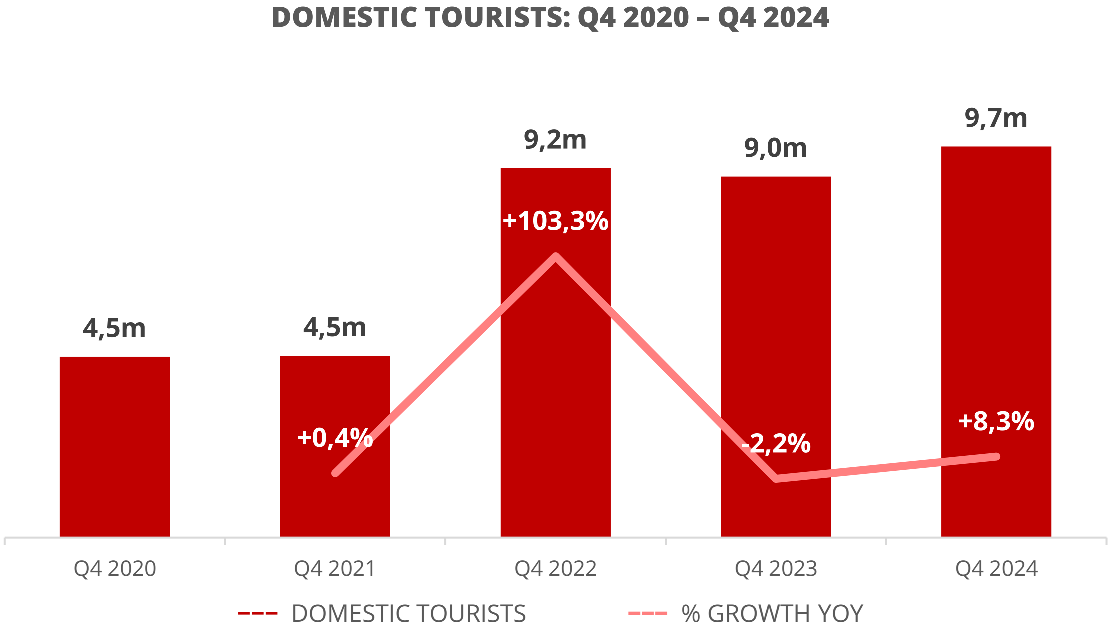

### TRIPS FROM SOURCE PROVINCE: Q4 2022 – Q4 2024

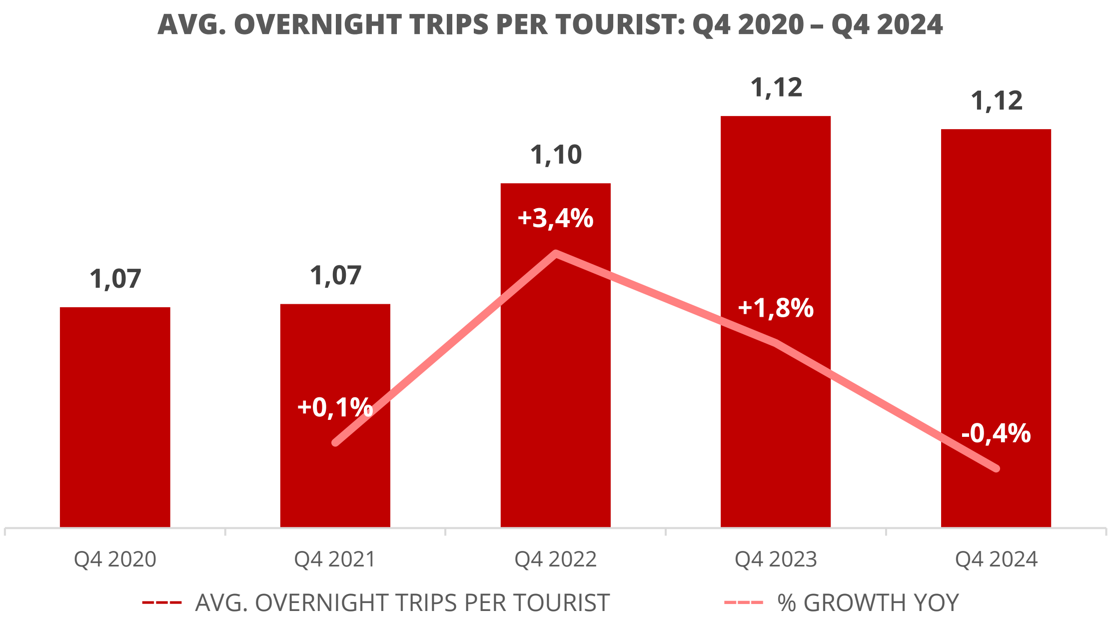
| | LM | FS | EC | GT | NW | NC | MP | KZ | WC |
|---|---|---|---|---|---|---|---|---|---|
| **Q4 2022** | 1.7m | 563k | 1.3m | 3.2m | 772k | 198k | 529k | 1.0m | 781k |
| **Q4 2023** | 2.0m | 773k | 1.2m | 2.8m | 677k | 373k | 417k | 1.2m | 636k |
| **Q4 2024** | 833k | 337k | 921k | 2.7m | 722k | 414k | 735k | 2.6m | 1.7m |

# OVERNIGHT TRIPS 10.9m +7.9%

In Q4 2024, the number of domestic tourists grew by 8.3%, reaching 9.7-million, up from 9.0-million in Q4 2023. It also exceeded the 9.2-million recorded in Q4 2022. The average number of trips per domestic tourist remained largely unchanged at approximately 1.1, and thus consistent with figures from previous years for the same quarter.

This indicates both the stability and continued growth of domestic tourism, although the number of trips per domestic tourist remains anchored at around one trip per person.



# OVERNIGHT TRIPS 10.9m +7.9%

In Q4 2024, the five primary reasons for not traveling, in order of significance, were financial reasons (41%), no reason to travel (22.3%), time constraints (9.4%), being unemployed or having no income (6.4%), and safety or security reasons (5.8%).

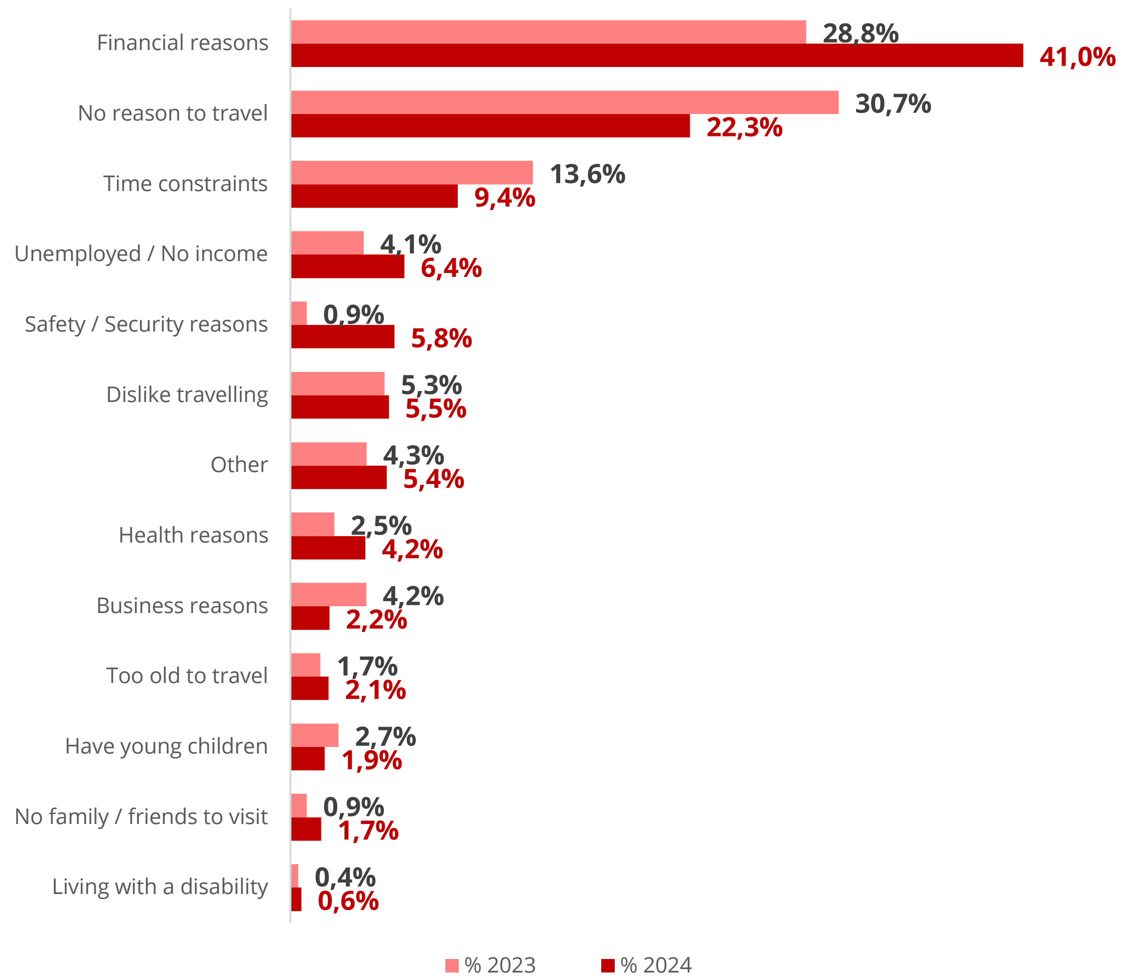
Financial constraints has become a much stronger barrier to travel, with financial reasons (the leading factor) increasing considerably from 28.8% in Q4 2023 to 41.0% in Q4 2024. Unemployment or lack of income also saw an increase, rising from 4.1% to 6.4% over the same period.

Safety and security concerns about travel, which had been on a downward trend from 2.9% in Q4 2022 to 0.9% in Q4 2023, resurfaced and saw a sharp increase to 5.8% in Q4 2024.

Meanwhile, the percentage of people citing no reason to travel declined from 30.7% to 22.3%, while time constraints dropped from 13.6% to 9.4%, compared to Q4 2023.

Collectively, the top five reasons for not traveling accounted for 84.9% of responses.

## MAIN REASONS FOR NOT TRAVELLING: Q4 2024



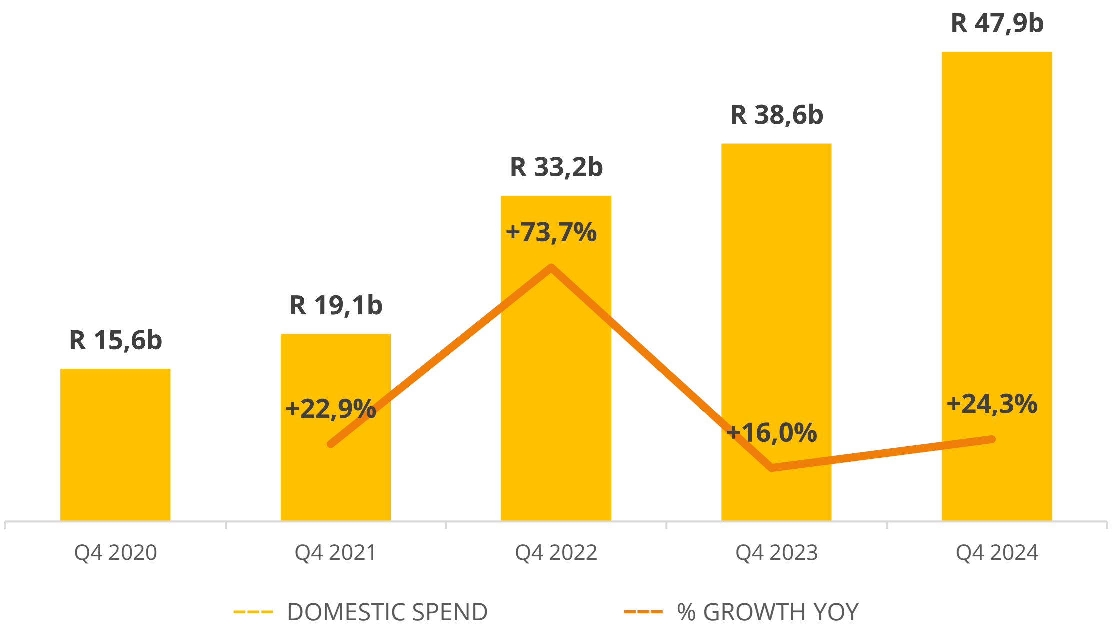
## DOMESTIC SPEND R 47.9b +24.3%

Domestic overnight spending is showing an upward year-on-year trend, growing from R32.2-billion (Q4 2022) to R47.9-billion (Q4 2024). In Q4 2024, domestic overnight spending grew by +24.3%. The overall rise in spending reflects the strength and growth of the domestic travel industry.

In Q4 2024, spending by holidaymakers and VFR accounted for 78.7% of domestic spending. The holiday category's share grew to 53.2%, also saw a notable rise in total spending from R19.4-billion in Q4 2023 to R25.5-billion. Although the VFR category's share of total spending decreased slightly, its total overnight spending still increased by 15.1%, from R10.6-billion to R12.2-billion over the same period.

Total overnight spending in the religious category grew by 56.3% to R1.3-billion, although the base size was small. The MICE sector also saw an increase in overnight spending, rising from R2.3-billion to R3.0-billion – a 30.4% increase.

### DOMESTIC SPEND: Q4 2020 – Q4 2024




### DOMESTIC SPEND BY PURPOSE: Q4 2023 v Q4 2024

| | Q4 2023 | Q4 2024 | % 2023 | % 2024 |
|---|---|---|---|---|
| **Holiday** | R 19.4b | R 25.5b | 50.2% | 53.2% |
| **VFR** | R 10.6b | R 12.2b | 27.5% | 25.5% |
| **Professional** | R 3.1b | R 3.1b | 8.0% | 6.4% |
| **MICE** | R 2.3b | R 3.0b | 6.0% | 6.2% |
| **Religious** | R 831.6m | R 1.3b | 2.2% | 2.7% |

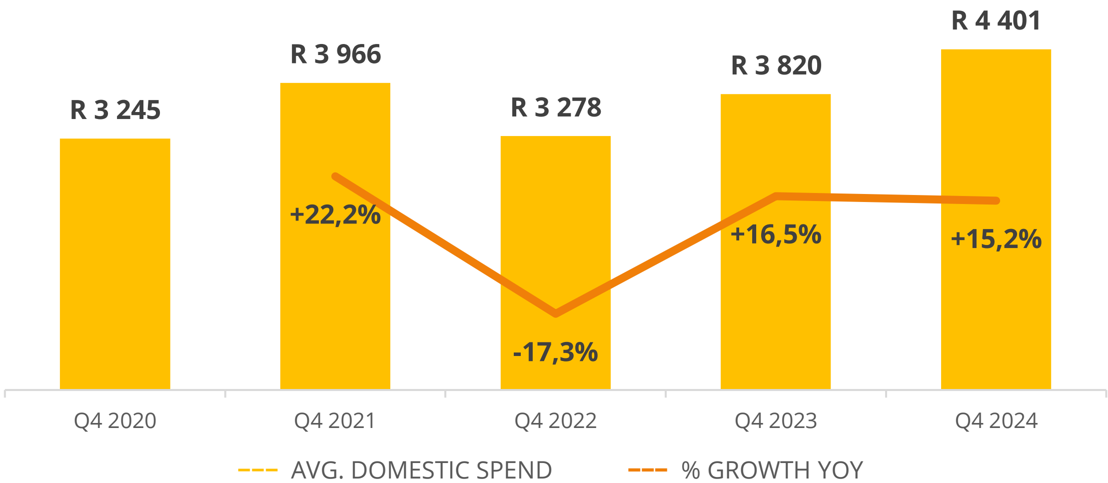
## DOMESTIC SPEND R 47.9b +24.3%

The year-on-year average domestic spend has shown a steady upward trend following its initial drop in Q4 2022. This quarter (Q4 2024), average domestic spend increased by 15.2%, resulting in an average spend of R4,401 compared to R3,820 in Q4 2023.

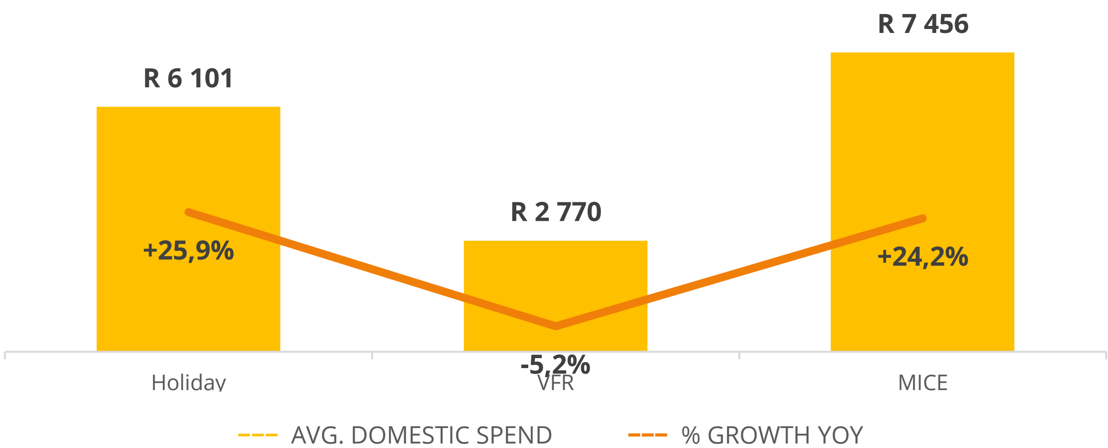
During this period, the average domestic overnight spend increased for both the Holiday (25.9%) and MICE (24.2%) categories. Holiday spending by visitors rose to an average of R6,101, while the average MICE spending reached R7,456.

Although total VFR spend grew by 15.2% in Q4 2024 (see slide 14), the average spend declined slightly by 5.2%, reaching an average of R2,770.

### AVG. DOMESTIC SPEND: Q4 2020 – Q4 2024




### AVG. DOMESTIC SPEND BY PURPOSE: Q4 2024



## DOMESTIC SPEND R 47.9b +24.3%

Although Transportation saw a decline of 8.4%, it remains the largest expenditure category at R14.1-billion, down from R15.4-billion in Q4 2023. Food & Beverages also experienced a moderate decline of 4.2% but retained its position as the second-largest expenditure category at R11.6-billion.

Accommodation, Personal Shopping, and Leisure & Entertainment all saw substantial increases of 90.4%, 87.6%, and 189%, respectively. Accommodation, as the third-largest expenditure category, grew from R4.4-billion to R8.4-billion, Personal Shopping increased from R4.2-billion to R7.9-billion, and Leisure & Entertainment rose from R1.0-billion to R2.9-billion.

This shift indicates an increasing consumer emphasis on discretionary spending, particularly in travel, shopping, and entertainment, despite declines in essential categories like transportation and food.

### DOMESTIC SPEND BY PURPOSE: Q4 2023 v Q4 2024

| | Q4 2023 | Q4 2024 | |
|---|---|---|---|
| TRANSPORT | R 15.4b | R 14.1b | -8.4% |
| FOOD & BEVERAGES | R 11.6b | R 11.1b | -4.2% |
| ACCOMMODATION | R 4.4b | R 8.4b | +90.4% |
| PERSONAL SHOPPING | R 4.2b | R 7.9b | +87.6% |
| LEISURE & ENTERTAINMENT | R 1.0b | R 2.9b | +189.0% |

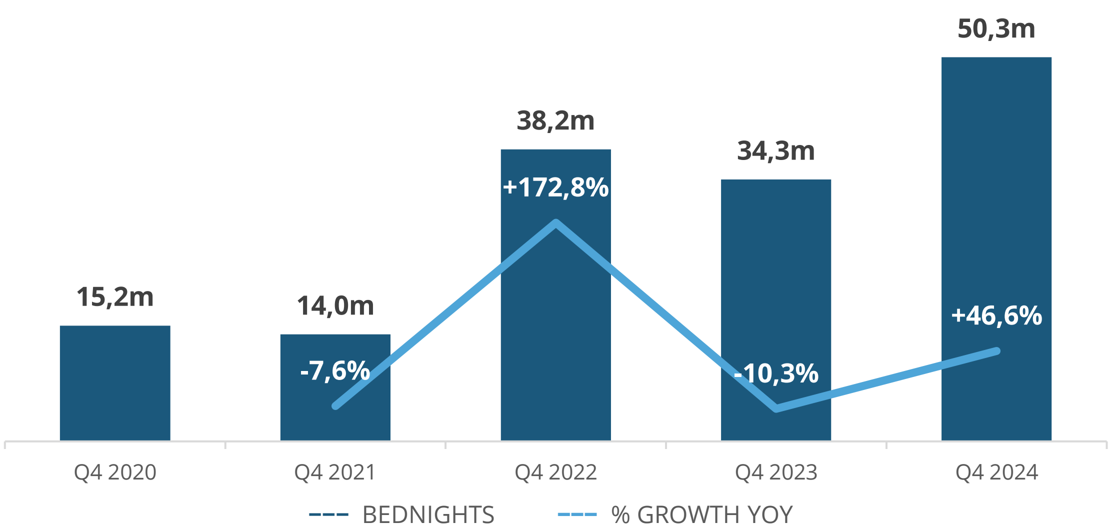
## BEDNIGHTS 50.3m +46.6%

In Q4 2024, bednights rose substantially by 46.6%, increasing from 34.3-million to 50.3-million, surpassing the Q4 2022 level of 38.2-million bednights.

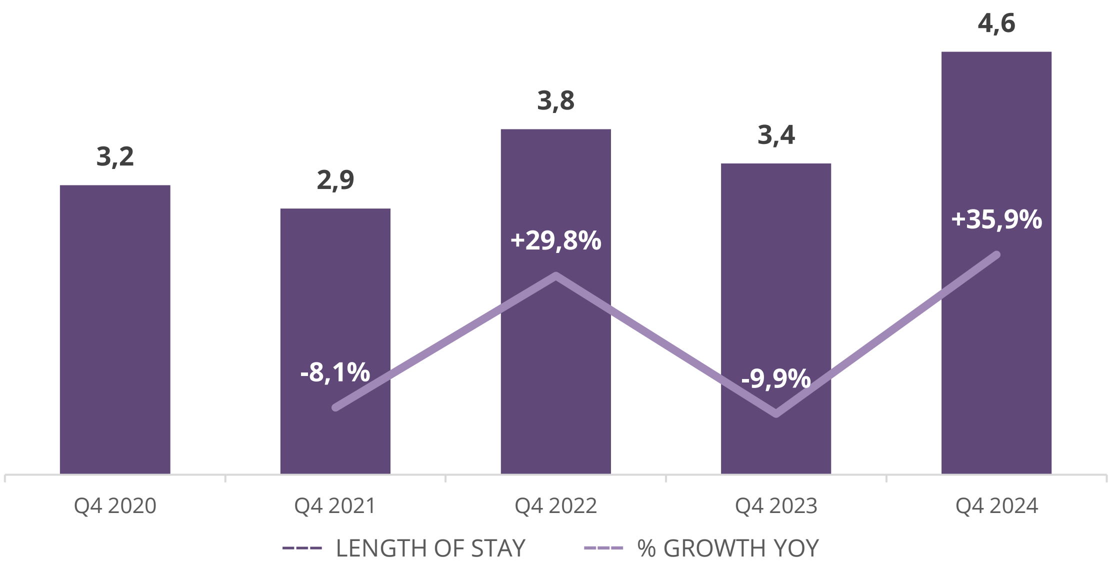
The average length of stay also saw a substantial increase of 35.9%, rising from 3.4 nights in Q4 2023 to 4.6 nights in Q4 2024, exceeding the Q4 2022 average of 3.8 nights.

The increase in domestic overnight trips, bednights, and average length of stay in Q4 2024 suggests a cautious yet positive trend toward recovery, stability, and sustained growth in travel demand.

### DOMESTIC BEDNIGHTS: Q4 2020 – Q4 2024




### DOMESTIC LENGTH OF STAY: Q4 2020 – Q4 2024



South Africa
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OCT - DEC
2024

# SECTION 4
PROVINCIAL PERFORMANCE

# PROVINCES

In the fourth quarter of 2024, KwaZulu-Natal, Gauteng, and the Western Cape emerged as the best performing main destination provinces in different (and similar) aspects of tourism activity. The North West and Free State also experienced growth in certain aspects of overnight tourism compared to Q4 2023.

KwaZulu-Natal was the most visited province, recording the highest number of domestic overnight trips at 2.6-million, the highest total overnight spend at R12.3-billion, and the second-highest number of bednights, reaching 9.5-million. Total overnight spend saw a phenomenal increase of 92.2% in Q4 2024, following a 116.9% increase in Q4 2023. Bednights also experienced substantial growth, rising by 41.5% this quarter compared to a 13.6% increase in Q4 2023.

Although Gauteng's domestic overnight trips declined by 9% in Q4 2024, it – along with the Western Cape – still recorded approximately 1.5-million domestic overnight trips, making them the second-largest destination provinces visited. Gauteng achieved a total overnight spend of R6.6-billion, the third-highest among the provinces, reflecting a 41.3% increase from Q4 2023. The province leads in total bednights, rising from 5.8-million to 10.9-million – an 88.5% increase. It also recorded the second-longest average length of stay (7.5 nights), just behind the Free State at 7.8 nights, with an impressive 107.2% increase compared to Q4 2023.

The Western Cape secured second-place positions in several domestic tourism activities in Q4 2024. It saw substantial increases of 158.2% in overnight trips, 214.8% in overnight spend, and 94% in bednights. With 1.5-million overnight trips, it matched Gauteng in visitor numbers, while its total overnight spend of R8.5-billion made it the second-highest revenue-generating province after KwaZulu-Natal. It also ranked among the highest in average overnight spend (R5,522), second only to the Free State. Bednights increased from 2.5-million in Q4 2023 to 4.9-million in Q4 2024.

The North West Province experienced growth in several domestic tourism activities in Q4 2024. The number of trips to the province increased by 226.0%, reaching 949k (up from 291k). Total spend rose by 142.5% to R4.9-billion, while average spend increased by 84.8% to R5 201 (up from R2 814). Total bednights grew by 137.9% to 5.1-million (up from 2.1-million), and the average length of stay increased by 81.4% to 5.4 nights (up from 3.0 nights).

Although the Free State experienced a major decline in the number of overnight trips, dropping from 778k to 456k, it also showed growth in several areas. Total overnight spend increased from R2.2-billion to R2.7-billion, with average spend rising by 103.6% from R2 875 to R5 854. Total bednights grew by 136.6% to 3.6-million (up from 1.5-million), and the average length of stay surged by 303.7% to 7.8 nights (up from 1.9 nights).

### OVERNIGHT TRIP PERFORMANCE INDICATORS BY DESTINATION PROVINCE: Q4 2024

| | Trips | Spend | Avg Spend | Bednights | LOS |
|---|---|---|---|---|---|
| **EC** | 1.3m | R 3.5b | R 2,661 | 6.4m | 4.8 |
| **FS** | 456k | R 2.7b | R 5,854 | 3.6m | 7.8 |
| **GT** | 1.5m | R 6.6b | R 4,539 | 10.9m | 7.5 |
| **KZ** | 2.6m | R 12.3b | R 4,692 | 9.5m | 3.6 |
| **LM** | 1.4m | R 4.8b | R 3,486 | 6.2m | 4.5 |
| **MP** | 787k | R 3.3b | R 4,248 | 3.1m | 4.0 |
| **NC** | 376k | R 1.2b | R 3,228 | 674k | 1.8 |
| **NW** | 949k | R 4.9b | R 5,201 | 5.1m | 5.4 |
| **WC** | 1.5m | R 8.5b | R 5,522 | 4.9m | 3.2 |

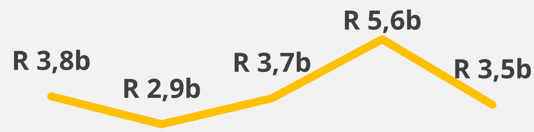
## EASTERN CAPE 1.3m -21.2%

### DESTINATION PROVINCE: EASTERN CAPE

**OVERNIGHT TRIPS**

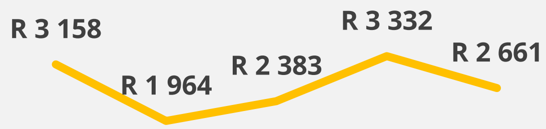

**1.3m**
**-21.2%**

**OVERNIGHT SPEND**



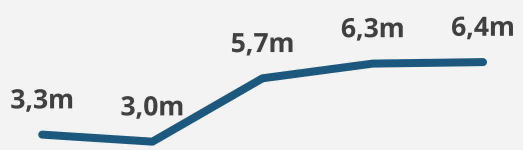

**R 3.5b**
**-37.1%**

**AVG. OVERNIGHT SPEND**



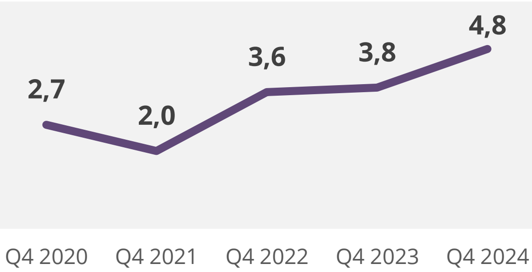

**R 2,661**
**-20.1%**

**BEDNIGHTS**




**6.4m**
**+0.9%**

**LENGTH OF STAY**




**4.8**
**+28.1%**

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 1.3m -21.2%

### DESTINATION PROVINCE: EASTERN CAPE

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 483k | 36.5% | +6.4% |
| VFR | 575k | 43.5% | -43.6% |
| PROFESSIONAL / BUSINESS | 17k | 1.3% | -60.9% |
| MICE | 72k | 5.5% | - % |
| RELIGIOUS | 79k | 6.0% | -39.5% |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 2.0b | 56.7% | -18.8% |
| VFR | R 988.1m | 28.1% | -54.5% |
| PROFESSIONAL / BUSINESS | R 13.9m | 0.4% | -95.4% |
| MICE | R 191.6m | 5.4% | - % |
| RELIGIOUS | R 89.3m | 2.5% | -85.4% |

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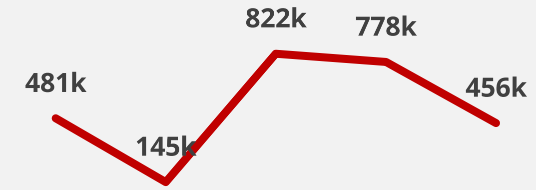
**FREE STATE** **456k** **-41.4%**

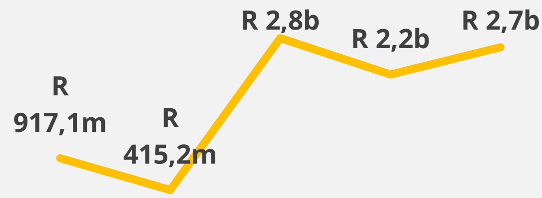
## DESTINATION PROVINCE: FREE STATE

### OVERNIGHT TRIPS



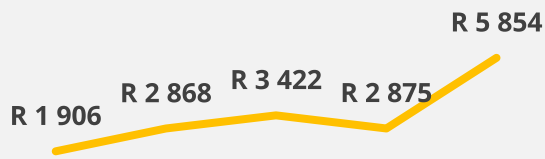

**456k**
**-41.4%**

### OVERNIGHT SPEND



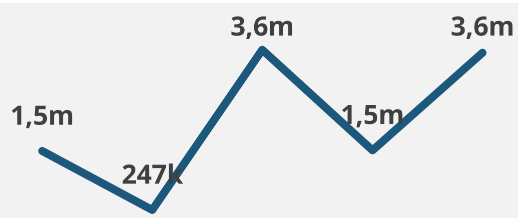

**R 2.7b**
**+19.3%**

### AVG. OVERNIGHT SPEND



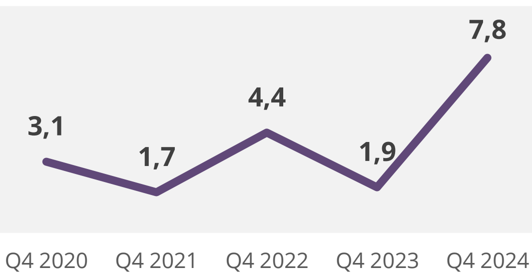

**R 5,854**
**+103.6%**

### BEDNIGHTS




**3.6m**
**+136.6%**

### LENGTH OF STAY




**7.8**
**+303.7%**

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# FREE STATE

**456k** -41.4%

DESTINATION PROVINCE: **FREE STATE**

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 181k | 39.6% | -41.4% |
| VFR | 240k | 52.5% | -28.4% |
| PROFESSIONAL / BUSINESS | 118k | 3.3% | -37.0% |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 1.8b | 66.9% | +54.9% |
| VFR | R 849.9m | 31.8% | +0.1% |
| PROFESSIONAL / BUSINESS | R 22.3m | 0.8% | -41.6% |

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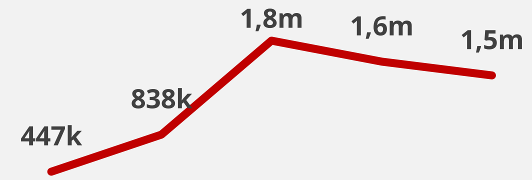
**GAUTENG** **1.5m** **-9.0%**

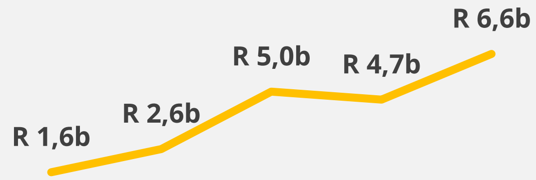
## DESTINATION PROVINCE: GAUTENG

**OVERNIGHT TRIPS**



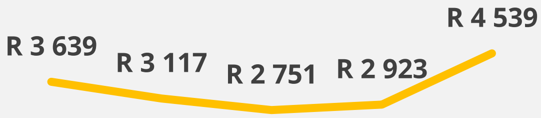

**1.5m**
**-9.0%**

**OVERNIGHT SPEND**



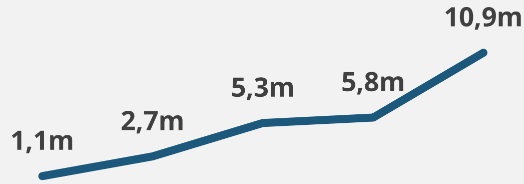

**R 6.6b**
**+41.3%**

**AVG. OVERNIGHT SPEND**



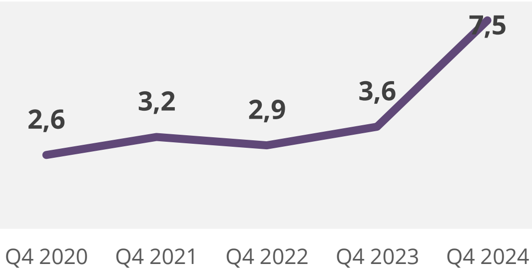

**R 4,539**
**+55.3%**

**BEDNIGHTS**




**10.9m**
**+88.5%**

**LENGTH OF STAY**




**7.5**
**+107.2%**

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# GAUTENG

**1.5m** -9.0%

**DESTINATION PROVINCE: GAUTENG**

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 490k | 33.5% | -40.9% |
| VFR | 574k | 39.2% | +5.5% |
| PROFESSIONAL / BUSINESS | 118k | 8.1% | +31.4% |
| MICE | 34k | 2.3% | +94.6% |
| MEDICAL | 35k | 2.4% | +1.0% |
| RELIGIOUS | 19k | 1.3% | -49.1% |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 2.0b | 30.9% | -24.0% |
| VFR | R 2.0b | 30.1% | +50.6% |
| PROFESSIONAL / BUSINESS | R 1.2b | 18.4% | +223.4% |
| MICE | R 295.6m | 4.5% | +794.0% |
| MEDICAL | R 645.9m | 9.7% | +699.5% |
| RELIGIOUS | R 111.2m | 1.7% | +1090.8% |

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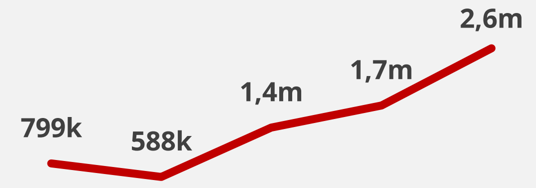
## KWAZULU-NATAL

**2.6m** **+52.8%**

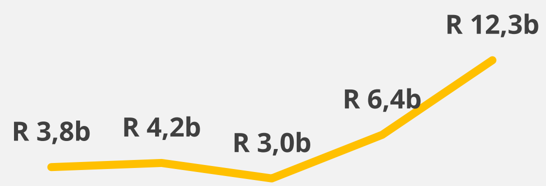
### DESTINATION PROVINCE: KWAZULU-NATAL

**OVERNIGHT TRIPS**



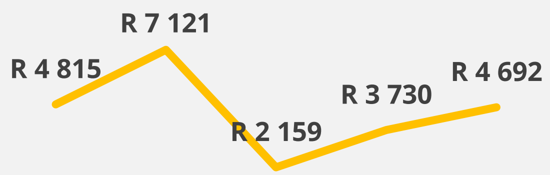

**2.6m**
**+52.8%**

**OVERNIGHT SPEND**



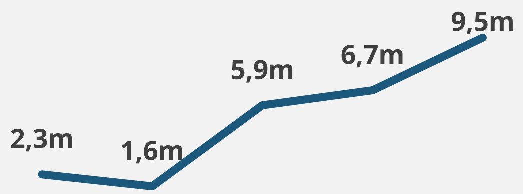

**R 12.3b**
**+92.2%**

**AVG. OVERNIGHT SPEND**



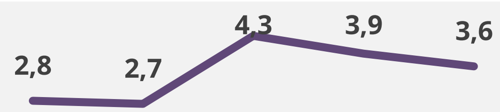

**R 4,692**
**+25.8%**

**BEDNIGHTS**




**9.5m**
**+41.5%**

**LENGTH OF STAY**




**3.6**
**-7.4%**

Q4 2020 Q4 2021 Q4 2022 Q4 2023 Q4 2024

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# KWAZULU-NATAL 2.6m +52.8%

DESTINATION PROVINCE: KWAZULU-NATAL

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 804k | 30.6% | -15.8% |
| VFR | 1.1m | 40.4% | +75.0% |
| PROFESSIONAL / BUSINESS | 214k | 8.2% | +74.9% |
| MICE | 191k | 7.3% | - % |
| MEDICAL | 67k | 2.6% | - % |
| RELIGIOUS | 214k | 8.2% | +511.0% |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 6.9b | 56.3% | +64.4% |
| VFR | R 2.1b | 17.2% | +37.4% |
| PROFESSIONAL / BUSINESS | R 471.6m | 3.8% | -20.8% |
| MICE | R 2.1b | 17.2% | - % |
| MEDICAL | R 79.3m | 0.6% | - % |
| RELIGIOUS | R 495.1m | 4.0% | +842.6% |

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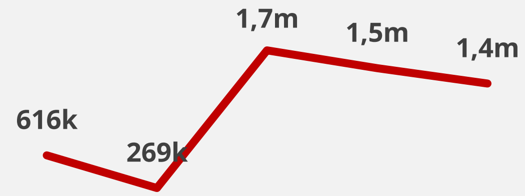
LIMPOPO **1.4m** -10.6%

## DESTINATION PROVINCE: LIMPOPO

### OVERNIGHT TRIPS

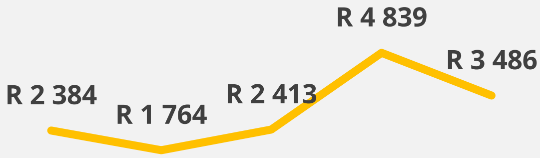



**1.4m**
-10.6%

### OVERNIGHT SPEND

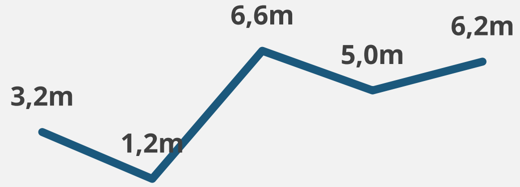

**R 4.8b**
-35.6%

### AVG. OVERNIGHT SPEND



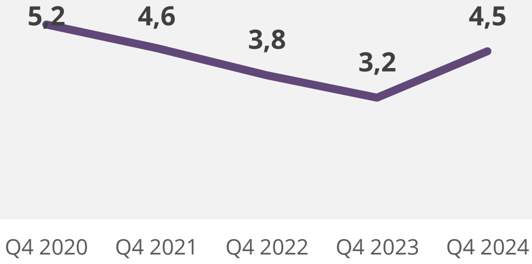

**R 3,486**
-28.0%

### BEDNIGHTS




**6.2m**
+24.4%

### LENGTH OF STAY




**4.5**
+39.2%

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## LIMPOPO 1.4m -10.6%

**DESTINATION PROVINCE: LIMPOPO**

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 634k | 46.1% | +199.3% |
| VFR | 549k | 39.9% | +20.1% |
| PROFESSIONAL / BUSINESS | 52k | 3.8% | -74.9% |
| RELIGIOUS | 41k | 3.0% | -49.9% |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 2.8b | 59.1% | +3.0% |
| VFR | R 562.7m | 11.7% | -72.4% |
| PROFESSIONAL / BUSINESS | R 1.1b | 22.7% | +86.4% |
| RELIGIOUS | R 41.3m | 0.9% | -37.4% |

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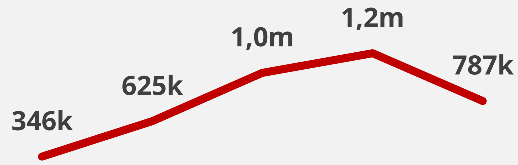
**MPUMALANGA** **787k** **-32.4%**

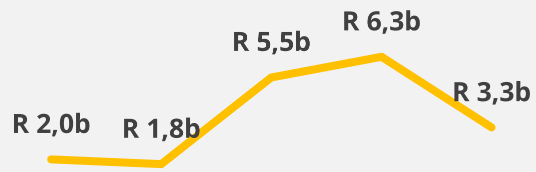
## DESTINATION PROVINCE: MPUMALANGA

**OVERNIGHT TRIPS**



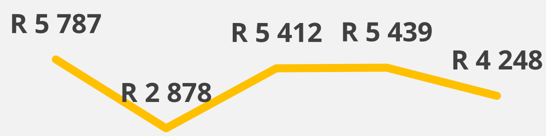

**787k**
**-32.4%**

**OVERNIGHT SPEND**



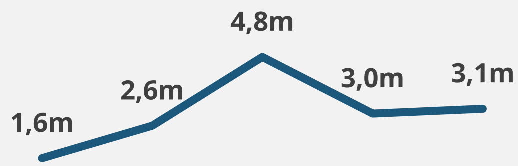

**R 3.3b**
**-47.2%**

**AVG. OVERNIGHT SPEND**



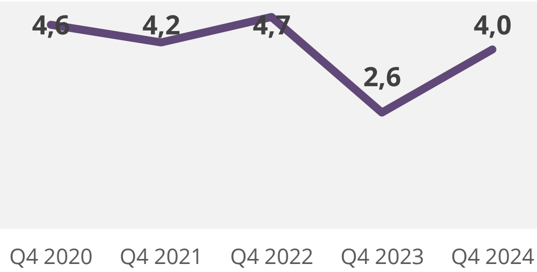

**R 4,248**
**-21.9%**

**BEDNIGHTS**




**3.1m**
**+5.2%**

**LENGTH OF STAY**




**4.0**
**+55.7%**

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## MPUMALANGA 787k -32.4%

### DESTINATION PROVINCE: MPUMALANGA

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 268k | 34.1% | -61.0% |
| VFR | 232k | 29.4% | +162.2% |
| PROFESSIONAL / BUSINESS | 75k | 9.5% | -60.8% |
| MEDICAL | 14k | 1.8% | - % |
| RELIGIOUS | 133k | 16.9% | - % |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 965.7m | 28.9% | -75.2% |
| VFR | R 1.1b | 33.5% | +74.7% |
| PROFESSIONAL / BUSINESS | R 269.6m | 8.1% | -29.5% |
| MEDICAL | R 43.0m | 1.3% | - % |
| RELIGIOUS | R 366.2m | 11.0% | - % |

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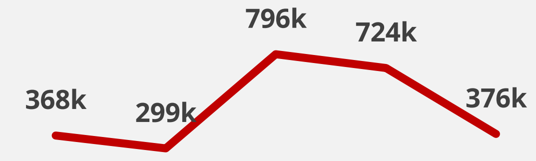
## NORTHERN CAPE

**376k** -48.1%

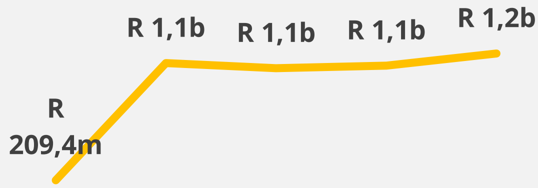
### DESTINATION PROVINCE: NORTHERN CAPE

**OVERNIGHT TRIPS**



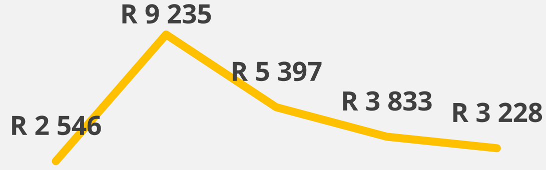

**376k**
**-48.1%**

**OVERNIGHT SPEND**



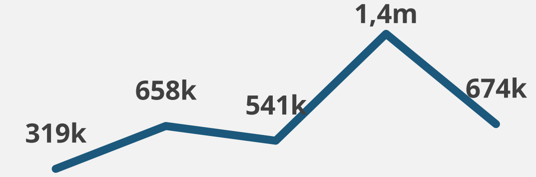

**R 1.2b**
**+8.7%**

**AVG. OVERNIGHT SPEND**



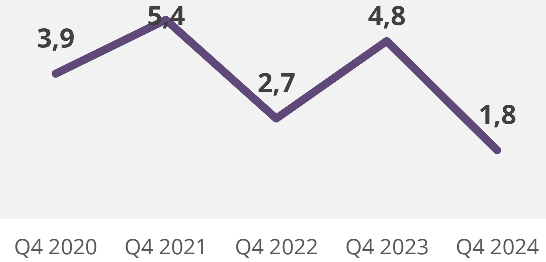

**R 3,228**
**-15.8%**

**BEDNIGHTS**




**674k**
**-51.4%**

**LENGTH OF STAY**




**1.8**
**-62.4%**

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.

NORTHERN CAPE 376k -48.1%

DESTINATION PROVINCE: NORTHERN CAPE

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 158k | 42.0% | +95.7% |
| VFR | 65k | 17.2% | -57.1% |
| MICE | 21k | 5.7% | - % |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 334.2m | 27.4% | -8.4% |
| VFR | R 230.8m | 19.0% | -8.4% |
| MICE | R 171.5m | 14.1% | - % |

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

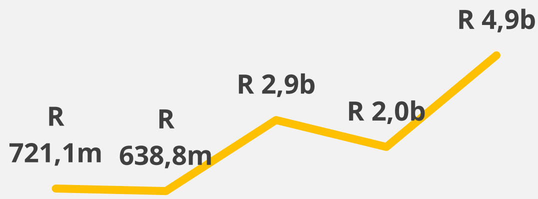
**949k** **+226.0%**

### DESTINATION PROVINCE: NORTH WEST

**OVERNIGHT TRIPS**

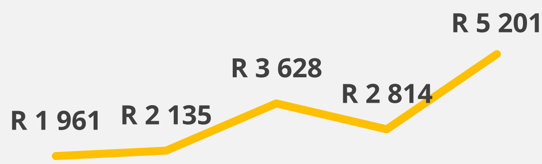

**949k**
**+226.0%**

**OVERNIGHT SPEND**



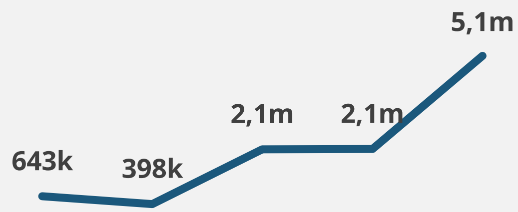

**R 4.9b**
**+142.5%**

**AVG. OVERNIGHT SPEND**



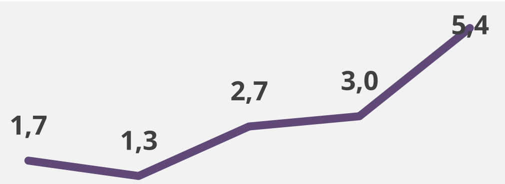

**R 5,201**
**+84.8%**

**BEDNIGHTS**




**5.1m**
**+137.9%**

**LENGTH OF STAY**




**5.4**
**+81.4%**

Q4 2020 Q4 2021 Q4 2022 Q4 2023 Q4 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

**949k** +226.0%

### DESTINATION PROVINCE: NORTH WEST

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 493k | 52.0% | +219.0% |
| VFR | 381k | 40.1% | +85.3% |
| RELIGIOUS | 29k | 3.0% | - % |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 3.5b | 71.3% | +405.6% |
| VFR | R 1.3b | 36.5% | +70.2% |
| RELIGIOUS | R 51.4m | 1.0% | - % |

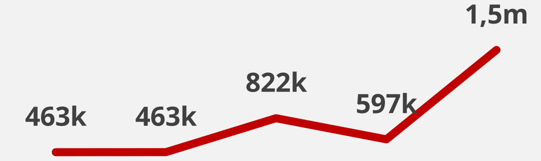
Key growth and change rates shown in this report are in comparison to 2023.
Data reported for Domestic Overnight Spend and Ave. Spend is based on the total spend of the journey and not exclusively to the Main Destination.

## WESTERN CAPE

**1.5m** **+158.2%**

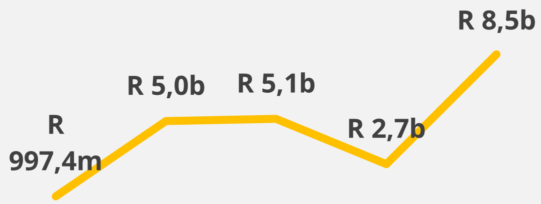
### DESTINATION PROVINCE: WESTERN CAPE

**OVERNIGHT TRIPS**



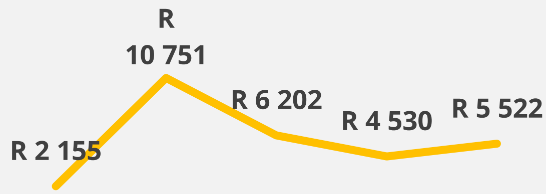

**1.5m**
**+158.2%**

**OVERNIGHT SPEND**



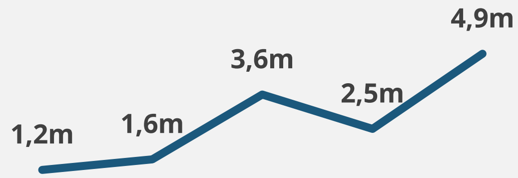

**R 8.5b**
**+214.8%**

**AVG. OVERNIGHT SPEND**



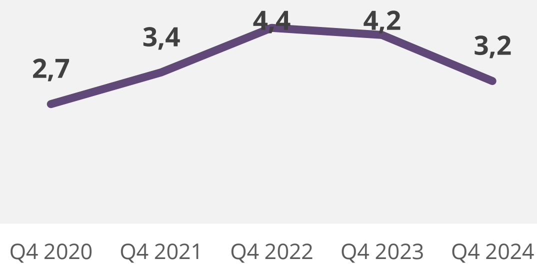

**R 5,522**
**+21.9%**

**BEDNIGHTS**




**4.9m**
**+94.0%**

**LENGTH OF STAY**




**3.2**
**-24.9%**

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.

## WESTERN CAPE 1.5m +158.2%

### DESTINATION PROVINCE: WESTERN CAPE

| OVERNIGHT TRIPS BY PURPOSE | TRIPS | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | 677k | 43.9% | +113.6% |
| VFR | 780k | 50.6% | +250.9% |
| MICE | 29k | 1.9% | +269.2% |
| RELIGIOUS | 33k | 2.1% | - % |

| OVERNIGHT SPEND BY PURPOSE | SPEND | SHARE | % YOY |
|---|---|---|---|
| HOLIDAY | R 5.1b | 60.2% | +255.6% |
| VFR | R 3.1b | 36.3% | +208.7% |
| MICE | R 136.2m | 1.6% | - % |
| RELIGIOUS | R 163.4m | 1.9% | - % |

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.

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# SECTION 5

## DOMESTIC DAY TRIPS

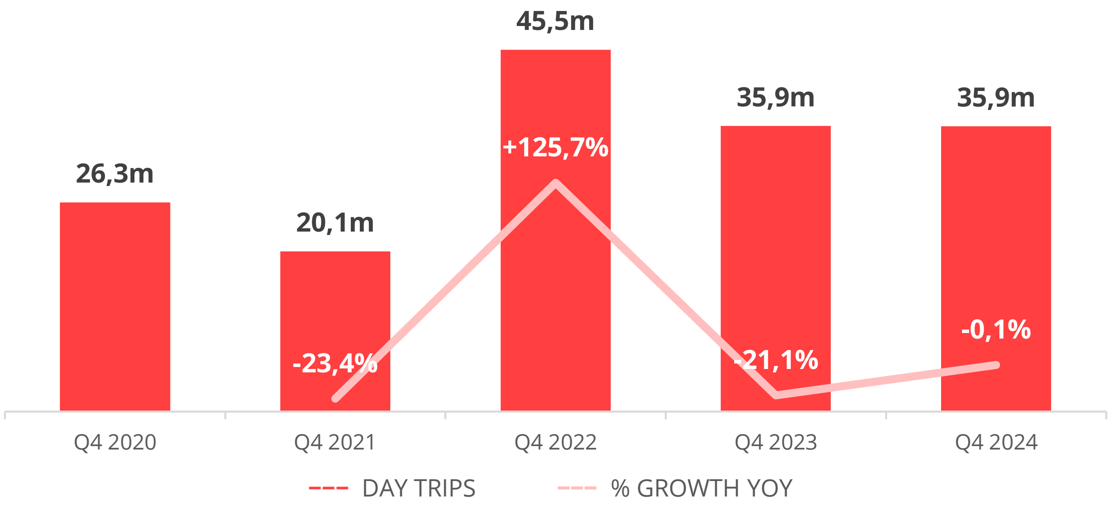
## DAY TRIPS 35.9m -0.1%

In Q4 2024, domestic day trips remained at 35.9-million, similar to the number of trips recorded in Q4 2023.

Holidays (9.4-million trips) and personal shopping (6-million trips) were the main purposes for day trips, although they declined by 4.3% and 3.4% respectively. Religious trips saw a phenomenal increase of 787.9%, rising from 172k trips to 1.5-million.

Business-related travel experienced the largest drop, decreasing by 45.7% from 4.5-million trips to 2.4-million. Its share of total trips also fell to 6.8%, compared to 12.5% in Q4 2023.

### DAY TRIPS: Q4 2020 – Q4 2024




### DAY TRIPS BY PURPOSE: Q4 2023 v Q4 2024

| | Q4 2023 | Q4 2024 | |
|---|---|---|---|
| HOLIDAY | 9.8m<br>27.2% | 9.4m<br>26.1% | -4.3% |
| PERSONAL SHOPPING | 5.8m<br>16.0% | 6.0m<br>16.6% | -3.4% |
| PROFESSIONAL / BUSINESS | 4.5m<br>12.5% | 2.4m<br>6.8% | -45.7% |
| RELIGIOUS | 172k<br>0.5% | 1.5m<br>4.3% | +787.9% |

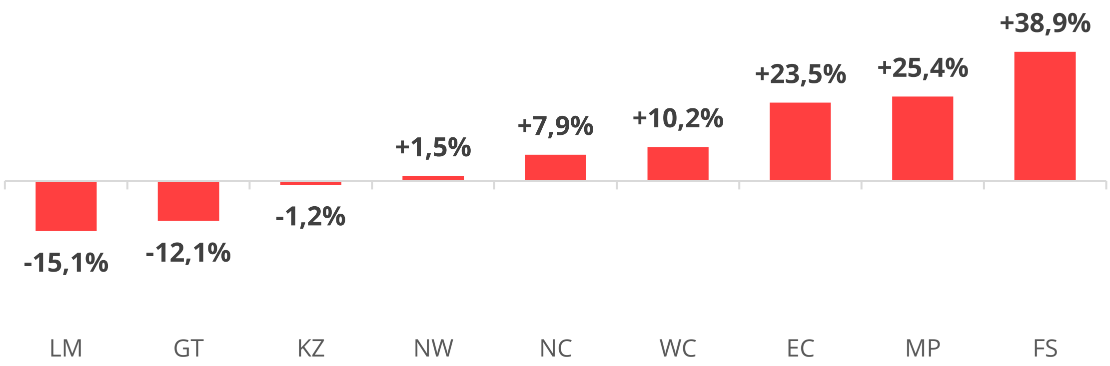
## DAY TRIPS 35.9m -0.1%

Unlike in Q4 2023, when only the Northern Cape experienced a positive growth rate as a source province for domestic day trips, Q4 2024 saw negative growth rates only in Limpopo, Gauteng, and KwaZulu-Natal, while all other provinces recorded increases.

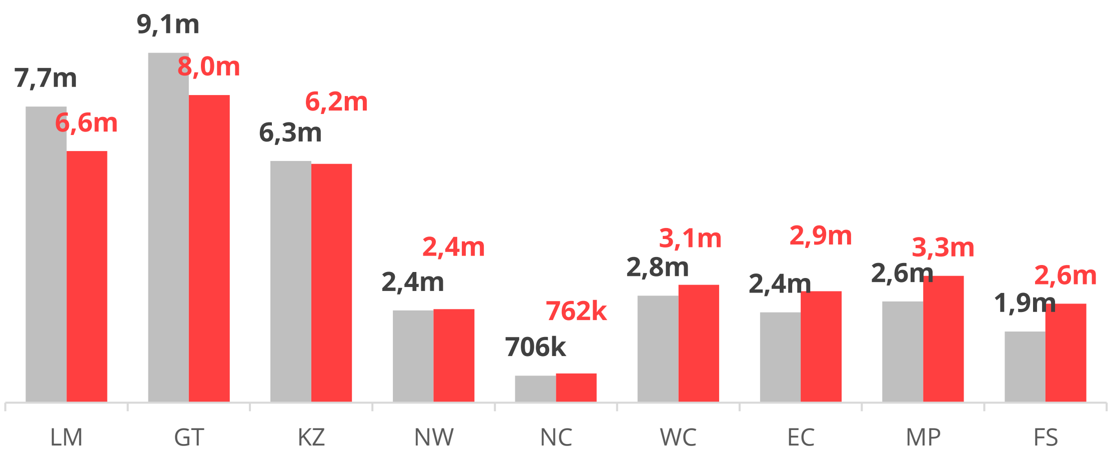
The Free State had the highest growth rate at 38.9%, followed by Mpumalanga at 25.4% and the Eastern Cape at 23.5%. The Western Cape saw a moderate increase of 10.2%, recovering from its 36.6% decline in Q4 2023. The Northern Cape also experienced a moderate increase of 7.9% in day trips, mirroring its steady growth in domestic overnight trips, both continuing on an upward trajectory from Q4 2022.

Despite their declines in Q4 2024, Gauteng, Limpopo, and KwaZulu-Natal still recorded the highest number of day trips as source provinces. Gauteng, despite a -12.1% decline, remained the leading source with 6.6-million day trips, down from 9.1-million. Limpopo had the largest decline in growth at -15.1% but still ranked second with 6.6-million day trips, followed by KwaZulu-Natal with 6.2-million.

### SOURCE PROVINCE GROWTH RATE: Q4 2023 v Q4 2024




### DAY TRIPS FROM SOURCE PROVINCE: Q4 2023 v Q4 2024



## DAY TRIPS

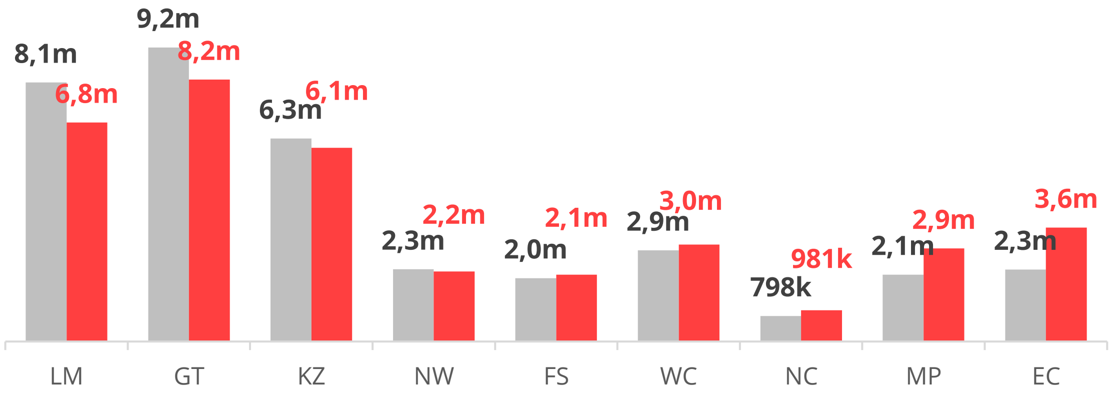
**35.9m** **-0.1%**

Gauteng, Limpopo, and KwaZulu-Natal all experienced declines as destination provinces for day trips in Q4 2024. However, these provinces still recorded the highest number of day trips received. Gauteng, which had the highest number of day trips, saw a decrease from 9.2 million to 8.2 million, while Limpopo declined from 8.1 million to 6.8 million, and KwaZulu-Natal fell from 6.3 million to 6.1 million.

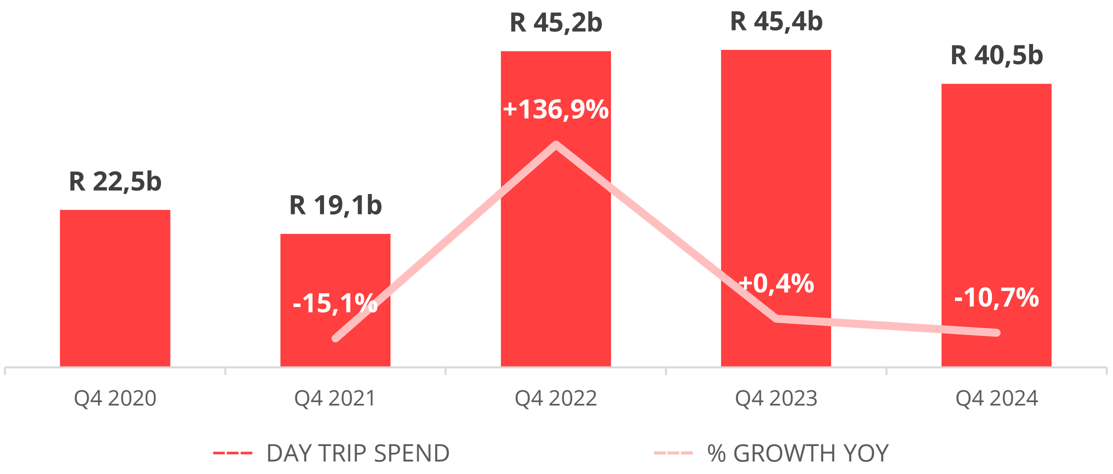
The Eastern Cape, Mpumalanga, Western Cape, Free State, and Northern Cape all saw an increase in day trips in the fourth quarter of 2024. The Eastern Cape recorded the largest increase, rising by 56.5% from 2.3 million to 3.6 million day trip visits, followed by Mpumalanga, which experienced a substantial 38.1% increase from 2.1 million to 2.9 million. The Western Cape and Free State saw marginal increases, while the Northern Cape remained the least frequented destination for day trips, similar to its situation in Q4 2023.

Domestic day trip spending declined by 10.7%, dropping from R45.4 Billion in Q4 2023 to R40.5 Billion in Q4 2024.

### DAY TRIPS TO DESTINATION PROVINCE: Q4 2023 v Q4 2024




### DAY TRIP SPEND: Q4 2020 – Q4 2024



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# SECTION 6

## THE ECONOMIC CONTEXT

# THE ECONOMIC CONTEXT

**-0.3***

The impact that the South African economy has upon domestic tourism is substantial. Each of the key economic metrics that are likely to have had an impact on travel during the **Oct-Dec 2024** period are discussed below.

## GDP

South Africa's gross domestic product (GDP) decreased by 0.3% in the third quarter of 2024, following an increase of 0.3% in the second quarter of 2024.[1]

The agriculture, forestry, and fishing sector experienced the sharpest decline (-28.8%), significantly impacting overall GDP. The transport, storage, and communication industry contracted by 1.6%, while trade, catering, and accommodation fell by 0.4%, both due to decreased economic activities. General government services also declined slightly (-0.1%) due to lower employment in national and provincial government sectors. The overall contraction was driven mainly by reduced agricultural output, transport activity, and government employment.[1]

On the other hand, some industries experienced growth. The finance, real estate, and business services sector grew by 1.3%, contributing 0.3 percentage points to GDP, driven by increased financial and real estate activities. Personal services and manufacturing both rose by 0.5%, with growth in health, education, and metal-related manufacturing. The mining and quarrying sector increased by 1.2%.[1]

## UNEMPLOYMENT RATE

In Q3 2024, the official unemployment rate stood at 31.9%.[2]

The number of employed individuals increased by 132,000, reaching 17.1-million, while the number of unemployed persons declined by 20,000 to 8.0-million.[2]

## PRIME INTEREST RATE

The South African Reserve Bank reduced its key interest rate by 25 basis points to 7.75% in November 2024, thus bringing borrowing costs to their lowest level since April 2023.

* Over Q3 2024.

[1] Statistical Release P0441: Gross Domestic Product – Third quarter 2024. 03 December 2024. Statistics South Africa.

[2] Media Release: Quarterly Labour Force Survey (QLFS) – Q4: 2024. 18 February 2025. Statistics South Africa.

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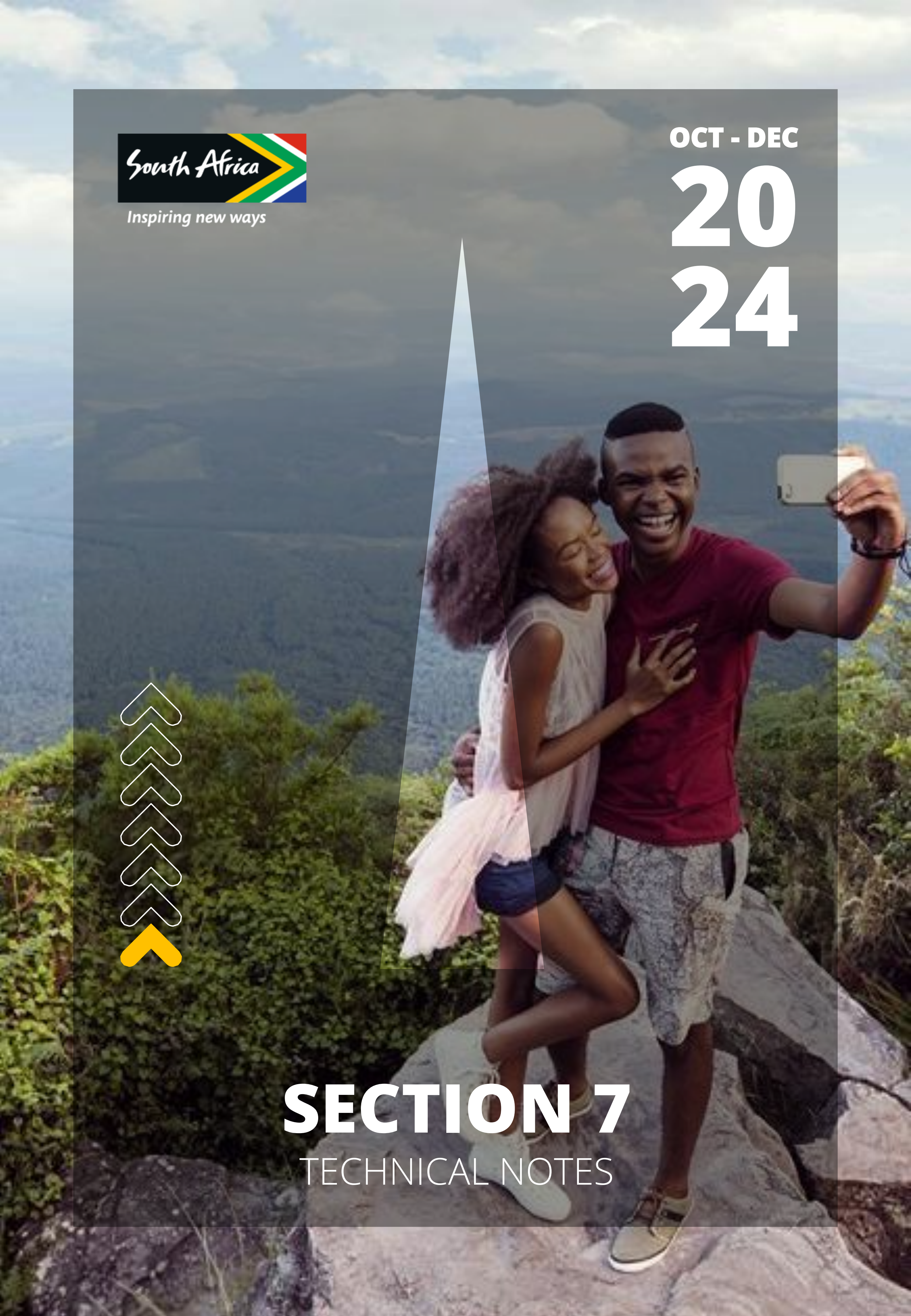

# SECTION 7
TECHNICAL NOTES

# TECHNICAL NOTES

Response rates at a provincial level against the quarterly quotas which were all achieved for Q4 2024.

| PROVINCE | QUARTERLY QUOTA | QUARTERLY ACHIEVED SAMPLE | COMPLETION RESPONSE RATE |
|---|---|---|---|
| Eastern Cape (EC) | 468 | 468 | 100% |
| Free State (FS) | 284 | 284 | 100% |
| Gauteng (GT) | 1,032 | 1,032 | 100% |
| KwaZulu-Natal (KZ) | 688 | 688 | 100% |
| Limpopo (LM) | 184 | 184 | 100% |
| Mpumalanga (MP) | 200 | 200 | 100% |
| North West (NW) | 120 | 120 | 100% |
| Northern Cape (NC) | 180 | 180 | 100% |
| Western Cape (WC) | 744 | 744 | 100% |
| **TOTAL** | **3,900** | **3,900** | **100%** |

# SAMPLING METHODOLOGY

A stratified, multi-stage, random probability sample design is used to draw the sample of EAs, because the resulting sample is representative of the South African adult population aged 18 years and older. It also ensures coverage of both locations and individuals by using Probability Proportionate to Size (PPS) sampling at higher levels of the hierarchy, and Equal Probability Selection Methods (EPSEM) at lower levels. The sampling design follows the previous DTS surveys and the sampling frame.

The base sample frame is derived from Stats SA Census 2011 and updated with the latest mid-year population estimates. It is supplemented by Geoterraimage's (GTI) national Building Census data on dwelling unit types and their New Developments© database.

Geographic area (urban, traditional, and farms), province (all nine provinces) and dominant population group were used as explicit stratification variables to ensure good coverage (of the target population). Type of dwelling, municipality, main place and sub place was used as implicit stratification variables to improve the representativeness in the sample.

The multi-stage drawing of the sample is based on three random selection elements: 1) enumerator areas (EAs) as primary sampling units; 2) dwellings/households as the secondary sampling units, and 3) adult household members aged 18+ years as the ultimate sampling units.

## SAMPLE SIZE AND ALLOCATION

The power allocation rule, a disproportional allocation technique, is used to determine the number of EAs per stratum. Power allocation results in a distribution that falls between equal allocation and proportional allocation.

The aim of this rule is to slightly decrease the allocation for the larger strata and to slightly increase the allocation for smaller strata. With this sampling technique, one can ensure (within the limits of the overall sample size) that the sample sizes in each stratum are sufficiently large to achieve the best possible precision while effectively representing different geographical areas, provinces, and population groups.

## SELECTION OF THE EAs

The EAs in each of the explicit strata are ordered according to municipality, main place, sub place and EA number upon which the predetermined numbers of EAs are drawn using probability proportional to size (PPS) systematic sampling, with the number of households per EA as the measure of size.

In each EA drawn, four households are systematically selected with equal probability, while the EAs are disproportionately allocated across the main strata to ensure sufficient representation of domestic tourism from smaller provinces.

A sample of 325 EAs is drawn each month, with four interviews per EA. This results in a monthly sample of 1,300 respondents (325 EAs x 4 Households per EA).

# SURVEY METHODOLOGY

The Domestic Tourism Survey (DTS) is a large-scale national household survey designed to interview South African adults aged 18 and older from selected households, in accordance with the sampling procedure outlined in the preceding slide.

Each selected member in a household is asked to provide detailed information about their travel, both day trips and night trips, from the previous month (i.e., travel that occurred in the month prior to data collection). Respondents who have been interviewed for the same survey in the past 12 months are excluded from participation in the survey.

## CAPI INTERVIEWS

Computer-Assisted Personal Interviewing (CAPI) is used in the data collection for the survey. The questionnaire is scripted for tablet-based CAPI interviewing.

All interviews are geo-fenced to ensure that the correct EAs are visited. The geographic coordinates of the interview location are captured on the tablet. The questionnaire will only open for the respondent interview once it synchronizes with the EA GIS coordinates, ensuring location accuracy.

The survey is available in all of the eleven official languages of South Africa. The respondent can select the language to be interviewed in.

## SELECTING HOUSEHOLDS/DWELLINGS

The selection of households in each EA is based on a random sampling procedure (i.e. a random walk pattern, a random household selection process, and random respondent selection). Multi-household dwelling structures (e.g. blocks of flats, compounds with multiple households, backyard dwellings, etc.) are counted as a separate sampling units.

All interviews are based on three contact attempts (callbacks) at the selected households. If the selected person is not available, return to the household on at least three separate occasions to attempt an interview. A dwelling is only substituted if a successful interview cannot be conducted after these three attempts. Strict controls are in place to manage substitutions, with a strong emphasis on minimising household substitutions.

*Continued…*

# SURVEY METHODOLOGY

## SELECTING THE RESPONDENTS

Once a household is selected, the interviewee is determined using the Kish Grid. All eligible adults (aged 18 years or older) residing in the selected household are listed in the grid.

The Kish Grid, pre-programmed into the script, automatically selects the household member for the interview. The interviewer then conducts the interview with the chosen individual. This method ensures unbiased sampling when multiple eligible participants are present in the household.

The target population for the SAT Domestic Travel 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:** Four main population groups
- **Area:** All 9 provinces

# FIELDWORK

## CAPI INTERVIEWING

The Domestic Travel Survey is collected using a structured questionnaire that is administered through a face-to-face interview in the respondent's home. Computer-Assisted Personal Interviewing (CAPI) is used in the data collection for the survey.

The questionnaire is programmed onto tablets with built-in logical validations, routing, and skip logic, and includes a digitised pre-programmed Kish Grid. The programmed questionnaire (or script) is tested before prior to the commencement of fieldwork. This is known as script validation. It is an iterative process until all parties are aligned that the script is ready for piloting.

When questionnaires are updated monthly, the client approves all changes before the revised version is implemented.

## PILOT TESTING OF QUESTIONNAIRE

Pilot interviews are conducted in field to ensure that the questionnaire is optimised for the actual monthly survey. If interviewers identify any issues during the pilot interviews or with the programmed questionnaire, this information is reported to the project management team for script updates.

Fieldwork begins after satisfactory pilot testing and necessary adjustments to the programmed questionnaire. A pilot debriefing session was conducted in consultation with SAT before proceeding with fieldwork.

## INTERVIEWERS AND FIELDWORK

The majority of Citizen Surveys' interviewers have over five years' experience conducting national (probability) surveys. Training is mandatory for interviewers, supervisors, field managers, operations, quality control, and data processing staff. Interviewers are trained on every project and are given a project-specific briefing and training prior to commencing fieldwork.

Interviewers are carefully assigned to familiar areas to optimise rapport and increase participation rates. They are equipped with Citizen Surveys-branded bibs, endorsement letters, and prominently displayed identification badges (name tags) to enhance their legitimacy and build trust.

The questionnaire is translated into all 11 official languages and integrated into the CAPI script. Face-to-face interviews are conducted in the respondent's preferred language, with all official languages available as options.

Citizen Surveys also conducts interviews after-hours or over weekends. All field teams are provided with rented vehicles to transport them to the interviewing locations. We also have procedures and protocols in place to ensure the safety of our interviewers and the respondents.

# WEIGHTING

Weights are assigned to ensure that weighted sample records closely represent the target population. They have been calculated and assigned to extrapolate the sample to national population statistics. For the DTS survey, to obtain a representative population sample, a stratified multistage probability sampling method was designed, as described in the Sampling slide (slide 52).

## DESIGN WEIGHTS

The design weight is the weight assigned to each household or respondent to account for their probability of being selected in the sample. It is calculated as the inverse of the inclusion probability, ensuring that individuals with a lower chance of selection are appropriately weighted to represent the population accurately.

The DTS survey was designed using a three-stage sampling process. Therefore, a weighting component must be calculated based on the inclusion probability of a unit at each stage. The overall design weight for each respondent is obtained by combining the weights from all three stages.

### Stage 1: Develop EA weights

In the first stage, primary sampling units (PSU), i.e. the EAs, are selected with probability proportional to size (PPS) from the population sampling frame. The weight of an EA (i.e. the inverse of the inclusion probability of an EA) is given by:

$$W_{PSU} = \left( n_{EA} \frac{PSU_{HH}}{POP_{HH}} . \right)^{-1}$$

where $n_{EA}$ is the allocated number of EAs in the stratum, $PSU_{HH}$ is the number of households in the selected EA, and $POP_{HH}$ is the number of households in the selected stratum.

*Continued...*

# WEIGHTING

### Stage 2: Develop Household weights

In the second stage, households are selected systematically within each PSU in the sample. From each selected EA, a predetermined number of households are selected with equal probability. The household weight per PSU is given by:

$$W_{HH} = W_{PSU}\left(\frac{n_{HH}}{PSU_{HH}}\right)^{-1}$$

where $n_{HH}$ is the number of selected households per PSU, and $PSU_{HH}$ is the number of households in the selected PSU.

### Stage 3: Develop Respondent weights

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

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

where $Av_{18+}$ is the average number of persons aged 18 years and older per selected household in the EA.

Since there are large differences in the number of persons, aged 18 years and older, per household, which may cause large deviations 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.

## NON-RESPONSES

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).

## CALIBRATION

Calibration is a process used in survey weighting to adjust design weights so that the final weighted sample matches known population totals for key demographic variables. The design weights of the respondents are benchmarked to the estimated 18 years and older population figures, based on the 2023 mid-year estimates of Stats SA. The variables province, population group (race), age and gender are used as benchmark variables.

Each iteration of the survey (monthly, quarterly, and annually) will be weighted and re-weighted to ensure alignment with the benchmark demographics regarding location and individuals.

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# APPENDIX A

MONTHLY SHARE OF
OVERNIGHT TRIPS & TRAVELLERS

# APPENDIX A

MONTHLY SHARE OF OVERNIGHT TRIPS & TRAVELLERS

**SHARE OF OVERNIGHT TRAVELLERS, BY MONTH**

| | | Travellers | | |
|---|---|---|---|---|
| | | Q4 2022 | Q4 2023 | Q4 2024 |
| Travel Month | October | 30.1% | 24.9% | 26.4% |
| | November | 29.2% | 29.2% | 30.7% |
| | December | 40.6% | 45.9% | 42.9% |

**SHARE OF OVERNIGHT TRIPS, BY MONTH**

| | | Overnight Trips | | |
|---|---|---|---|---|
| | | Q4 2022 | Q4 2023 | Q4 2024 |
| Travel Month | October | 30.0% | 24.5% | 26.8% |
| | November | 28.7% | 30.4% | 30.9% |
| | December | 41.3% | 45.1% | 42.3% |

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# APPENDIX B

PURPOSE OF TRIP BY
SOCIO-DEMOGRAPHIC INDICATORS

# APPENDIX B

## PURPOSE OF TRIP BY SOCIO-DEMOGRAPHIC INDICATORS

**SOCIO-DEMOGRAPHICS, BY PURPOSE**

| | | Q4 2022 | | | Q4 2023 | | | Q4 2024 | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | VFR | Holiday | MICE | VFR | Holiday | MICE | VFR | Holiday | MICE |
| Highest Level of Education | Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| | No school | 2.2% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | Some primary school | 7.2% | 2.8% | 0.0% | 7.9% | 2.1% | 0.0% | 0.7% | 0.6% | 0.0% |
| | Primary school completed | 4.4% | 0.0% | 0.0% | 2.3% | 9.1% | 0.0% | 2.6% | 2.1% | 0.0% |
| | Some high school | 32.4% | 14.5% | 4.0% | 26.0% | 7.1% | 0.0% | 22.4% | 19.6% | 12.1% |
| | High school completed | 27.6% | 47.9% | 25.7% | 40.6% | 28.6% | 18.7% | 53.2% | 34.0% | 58.2% |
| | Some college | 3.0% | 0.9% | 0.0% | 3.9% | 7.1% | 0.0% | 1.5% | 6.2% | 0.0% |
| | College completed | 10.3% | 7.3% | 32.4% | 5.6% | 5.9% | 79.2% | 4.6% | 11.7% | 5.4% |
| | Some university | 2.3% | 1.0% | 0.0% | 2.0% | 4.8% | 0.0% | 2.7% | 4.2% | 20.5% |
| | Technikon diploma / degree | 1.5% | 8.4% | 10.9% | 6.0% | 8.9% | 0.0% | 2.8% | 5.2% | 0.0% |
| | University degree / diploma | 7.1% | 11.7% | 20.7% | 3.3% | 13.8% | 2.0% | 7.9% | 15.1% | 0.0% |
| | Post-graduate degree | 2.0% | 5.6% | 6.3% | 1.3% | 12.5% | 0.0% | 1.6% | 1.3% | 3.8% |
| | Refused / Unknown | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gender | Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| | Male | 40.0% | 60.2% | 87.7% | 54.4% | 50.4% | 98.0% | 42.7% | 52.4% | 50.0% |
| | Female | 60.0% | 39.8% | 12.3% | 45.6% | 49.6% | 2.0% | 57.3% | 47.6% | 50.0% |
| Marital Status | Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| | Single / Never married | 41.9% | 58.3% | 58.5% | 62.8% | 50.0% | 23.2% | 50.6% | 46.1% | 45.8% |
| | Married / Living together | 39.1% | 35.2% | 37.9% | 26.9% | 45.7% | 76.8% | 35.3% | 44.5% | 33.7% |
| | Divorced / Widowed / Separated | 18.9% | 6.6% | 3.6% | 10.3% | 4.3% | 0.0% | 14.1% | 9.3% | 20.5% |
| | Refused | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Family Situation | Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| | No children | 18.9% | 38.6% | 7.4% | 24.9% | 29.7% | 23.2% | 27.4% | 23.3% | 9.0% |
| | Children, dependent | 60.6% | 47.9% | 35.1% | 53.7% | 52.2% | 76.8% | 51.3% | 64.3% | 85.4% |
| | Children, independent | 14.6% | 12.9% | 41.4% | 11.6% | 7.4% | 0.0% | 9.9% | 10.4% | 5.5% |
| | Children, dependent + independent | 5.9% | 0.6% | 16.1% | 9.8% | 10.7% | 0.0% | 11.5% | 2.1% | 0.0% |
| | Refused | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Personal Monthly Income | Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| | R1 - R500 | 7.9% | 9.0% | 0.0% | 4.7% | 2.9% | 0.0% | 5.4% | 3.1% | 0.0% |
| | R501 - R750 | 5.7% | 4.6% | 0.0% | 2.2% | 3.0% | 18.7% | 0.8% | 2.2% | 0.0% |
| | R751 - R1,000 | 6.6% | 3.3% | 0.0% | 3.8% | 1.5% | 0.0% | 3.2% | 1.5% | 0.0% |
| | R1,001 - R1,500 | 5.5% | 1.1% | 0.0% | 4.9% | 1.4% | 0.0% | 6.6% | 4.5% | 22.1% |
| | R1,501 - R2,000 | 16.7% | 4.7% | 0.0% | 12.9% | 6.1% | 0.0% | 5.6% | 4.5% | 0.0% |
| | R2,001 - R3,000 | 5.8% | 4.7% | 5.2% | 18.5% | 2.3% | 0.0% | 8.4% | 9.0% | 0.0% |
| | R3,001 - R5,000 | 18.9% | 15.4% | 3.8% | 13.1% | 9.0% | 0.0% | 10.0% | 10.9% | 9.7% |
| | R5,001 - R7,500 | 4.2% | 8.4% | 3.2% | 10.4% | 9.8% | 0.0% | 5.9% | 8.0% | 14.1% |
| | R7,501 - R10,000 | 3.0% | 7.2% | 9.0% | 2.7% | 7.0% | 0.0% | 12.5% | 6.8% | 17.6% |
| | R10,001 - R15,000 | 4.3% | 6.6% | 17.1% | 6.1% | 9.4% | 74.7% | 2.3% | 5.4% | 0.0% |
| | R15,001 - R20,000 | 10.0% | 9.9% | 36.4% | 4.9% | 4.9% | 0.0% | 1.6% | 7.3% | 0.0% |
| | R20,001 - R30,000 | 2.6% | 6.5% | 0.0% | 4.1% | 11.9% | 6.6% | 1.9% | 2.3% | 24.4% |
| | R30,001+ | 2.6% | 10.0% | 19.0% | 4.0% | 12.8% | 0.0% | 5.9% | 9.0% | 0.0% |
| | Refused to answer | 4.6% | 6.3% | 0.0% | 4.9% | 6.5% | 0.0% | 15.0% | 18.1% | 9.0% |
| | Don't Know / Uncertain | 0.8% | 0.8% | 0.0% | 0.7% | 10.2% | 0.0% | 10.2% | 2.8% | 3.2% |
| | No income | 0.7% | 1.7% | 6.3% | 2.1% | 1.4% | 0.0% | 4.8% | 4.6% | 0.0% |
| Age Group | Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| | 18 - 24 | 15.7% | 28.5% | 20.8% | 19.1% | 13.5% | 18.7% | 13.4% | 14.4% | 22.1% |
| | 25 - 34 | 23.9% | 22.1% | 0.0% | 26.2% | 34.0% | 79.2% | 19.2% | 38.8% | 17.0% |
| | 35 - 44 | 17.3% | 21.5% | 40.5% | 24.2% | 29.7% | 2.0% | 26.6% | 17.2% | 5.3% |
| | 45 - 54 | 14.6% | 12.6% | 28.4% | 11.9% | 6.7% | 0.0% | 16.5% | 19.1% | 41.5% |
| | 55+ | 28.5% | 15.4% | 10.3% | 18.6% | 16.1% | 0.0% | 24.2% | 10.4% | 14.0% |

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# APPENDIX C

## OVERNIGHT TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

# APPENDIX C

## OVERNIGHT TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

**SOCIO-DEMOGRAPHICS, BY OVERNIGHT TRIPS**

| | | Overnight Trips | | |
|---|---|---|---|---|
| | | Q4 2022 | Q4 2023 | Q4 2024 |
| Highest Level of Education | Total | 100.0% | 100.0% | 100.0% |
| | No school | 1.3% | 0.3% | 0.0% |
| | Some primary school | 4.6% | 3.7% | 0.8% |
| | Primary school completed | 4.2% | 4.4% | 2.0% |
| | Some high school | 24.5% | 15.0% | 24.5% |
| | High school completed | 34.7% | 36.2% | 41.2% |
| | Some college | 2.2% | 5.3% | 4.4% |
| | College completed | 8.8% | 7.8% | 7.3% |
| | Some university | 1.5% | 5.2% | 3.7% |
| | Technikon diploma / degree | 4.6% | 7.1% | 4.0% |
| | University degree / diploma | 8.6% | 9.2% | 10.6% |
| | Post-graduate degree | 5.1% | 5.7% | 1.5% |
| | Refused / Unknown | 0.0% | 0.0% | 0.0% |
| Gender | Total | 100.0% | 100.0% | 100.0% |
| | Male | 53.4% | 59.3% | 49.8% |
| | Female | 46.6% | 40.7% | 50.2% |
| Marital Status | Total | 100.0% | 100.0% | 100.0% |
| | Single / Never married | 49.1% | 54.3% | 50.8% |
| | Married / Living together | 38.5% | 40.2% | 36.0% |
| | Divorced / Widowed / Separated | 12.4% | 5.5% | 13.2% |
| | Refused | 0.0% | 0.0% | 0.0% |
| Family Situation | Total | 100.0% | 100.0% | 100.0% |
| | No children | 26.1% | 29.9% | 24.9% |
| | Children, dependent | 54.9% | 52.4% | 58.7% |
| | Children, independent | 13.6% | 9.2% | 9.5% |
| | Children, dependent + independent | 5.4% | 8.5% | 6.9% |
| | Refused | 0.0% | 0.0% | 0.0% |
| Personal Monthly Income | Total | 100.0% | 100.0% | 100.0% |
| | R1 - R500 | 7.3% | 3.7% | 4.0% |
| | R501 - R750 | 4.7% | 3.4% | 1.2% |
| | R751 - R1,000 | 5.2% | 2.2% | 3.6% |
| | R1,001 - R1,500 | 3.6% | 5.9% | 7.5% |
| | R1,501 - R2,000 | 11.3% | 7.1% | 4.3% |
| | R2,001 - R3,000 | 4.9% | 9.1% | 10.3% |
| | R3,001 - R5,000 | 15.4% | 8.7% | 9.2% |
| | R5,001 - R7,500 | 5.6% | 12.3% | 6.0% |
| | R7,501 - R10,000 | 5.4% | 4.2% | 10.1% |
| | R10,001 - R15,000 | 5.0% | 9.3% | 3.7% |
| | R15,001 - R20,000 | 11.2% | 5.4% | 4.4% |
| | R20,001 - R30,000 | 4.9% | 8.7% | 3.7% |
| | R30,001+ | 5.8% | 7.7% | 6.3% |
| | Refused to answer | 6.0% | 5.5% | 15.9% |
| | Don't Know / Uncertain | 0.7% | 5.5% | 5.4% |
| | No income | 3.0% | 1.5% | 4.5% |
| Age Group | Total | 100.0% | 100.0% | 100.0% |
| | 18 - 24 | 19.5% | 16.0% | 14.0% |
| | 25 - 34 | 23.2% | 28.2% | 28.8% |
| | 35 - 44 | 20.0% | 29.0% | 22.3% |
| | 45 - 54 | 13.8% | 9.3% | 18.1% |
| | 55+ | 23.5% | 17.5% | 16.9% |

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# APPENDIX D

## DAY TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

# APPENDIX D

## DAY TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

**SOCIO-DEMOGRAPHICS, BY DAY TRIPS**

| | | Day Trips | | |
|---|---|---|---|---|
| | | Q4 2022 | Q4 2023 | Q4 2024 |
| Highest Level of Education | Total | 100.0% | 100.0% | 100.0% |
| | No school | 1.2% | 0.2% | 1.5% |
| | Some primary school | 4.3% | 1.4% | 5.5% |
| | Primary school completed | 3.1% | 3.7% | 4.9% |
| | Some high school | 29.6% | 26.5% | 23.3% |
| | High school completed | 41.0% | 39.6% | 39.0% |
| | Some college | 2.4% | 3.4% | 3.3% |
| | College completed | 7.2% | 11.6% | 6.9% |
| | Some university | 0.8% | 2.0% | 5.1% |
| | Technikon diploma / degree | 4.3% | 4.7% | 2.3% |
| | University degree / diploma | 4.2% | 5.8% | 6.9% |
| | Post-graduate degree | 1.9% | 1.2% | 1.2% |
| | Refused / Unknown | 0.0% | 0.0% | 0.0% |
| Gender | Total | 100.0% | 100.0% | 100.0% |
| | Male | 51.9% | 55.2% | 48.3% |
| | Female | 48.1% | 44.8% | 51.7% |
| Marital Status | Total | 100.0% | 100.0% | 100.0% |
| | Single / Never married | 61.5% | 61.5% | 58.7% |
| | Married / Living together | 31.4% | 33.2% | 30.2% |
| | Divorced / Widowed / Separated | 7.1% | 5.3% | 11.2% |
| | Refused | 0.0% | 0.0% | 0.0% |
| Family Situation | Total | 100.0% | 100.0% | 100.0% |
| | No children | 23.8% | 29.6% | 25.5% |
| | Have children who are dependent | 58.3% | 54.4% | 54.6% |
| | Have children who are not dependent | 15.1% | 12.7% | 13.6% |
| | Have children, some dependent others not | 2.9% | 3.3% | 6.3% |
| | Refused | 0.0% | 0.0% | 0.0% |
| Personal Monthly Income | Total | 100.0% | 100.0% | 100.0% |
| | R1 - R500 | 11.6% | 9.2% | 7.7% |
| | R501 - R750 | 3.3% | 1.9% | 2.0% |
| | R751 - R1,000 | 7.9% | 4.3% | 6.4% |
| | R1,001 - R1,500 | 6.6% | 6.1% | 6.8% |
| | R1,501 - R2,000 | 13.3% | 7.4% | 9.4% |
| | R2,001 - R3,000 | 11.4% | 12.0% | 12.3% |
| | R3,001 - R5,000 | 11.7% | 13.3% | 12.8% |
| | R5,001 - R7,500 | 8.0% | 11.9% | 7.5% |
| | R7,501 - R10,000 | 5.6% | 7.1% | 5.0% |
| | R10,001 - R15,000 | 3.6% | 8.7% | 6.2% |
| | R15,001 - R20,000 | 4.4% | 5.7% | 2.9% |
| | R20,001 - R30,000 | 2.4% | 3.3% | 2.6% |
| | R30,001+ | 2.6% | 3.6% | 2.9% |
| | Refused to answer | 2.8% | 2.6% | 10.7% |
| | Don't Know / Uncertain | 0.9% | 1.2% | 1.2% |
| | No income | 3.8% | 1.7% | 3.5% |
| Age Group | Total | 100.0% | 100.0% | 100.0% |
| | 18 - 24 | 17.0% | 17.1% | 16.4% |
| | 25 - 34 | 30.1% | 28.0% | 26.0% |
| | 35 - 44 | 23.0% | 25.4% | 24.8% |
| | 45 - 54 | 15.4% | 12.1% | 15.2% |
| | 55+ | 14.4% | 17.5% | 17.6% |

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# APPENDIX E

## SHARE OF TRANSPORT USED TO TRAVEL TO DESTINATION

# APPENDIX E

## SHARE OF TRANSPORT USED TO TRAVEL TO DESTINATION

**SHARE OF TRANSPORT TYPE**

| | | Share pf Transport Type | | |
|---|---|---|---|---|
| | | Q4 2022 | Q4 2023 | Q4 2024 |
| Main Transport to Destination | My car/van/bakkie | 27.4% | 33.6% | 34.6% |
| | Minibus taxi | 36.9% | 31.6% | 31.4% |
| | Someone else's car/van/bakkie | 23.1% | 23.3% | 18.4% |
| | Commercial bus | 2.2% | 6.0% | 6.0% |
| | Metered taxi | 1.7% | 0.7% | 3.5% |
| | Rental car | 2.6% | 2.2% | 3.0% |
| | Aeroplane | 1.4% | 2.6% | 2.6% |
| | Tour bus | 2.3% | 1.0% | 1.2% |
| | Truck or lorry | 1.5% | 0.9% | 1.0% |
| | Motorcycle | - | - | 0.7% |
| | App-based cabs (Uber,Bolt,etc.) | 0.2% | 0.7% | 0.1% |

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# APPENDIX F

SHARE OF BEDNIGHTS BY ACCOMMODATION TYPE

# APPENDIX F
## SHARE OF BEDNIGHTS BY ACCOMMODATION TYPE

**SHARE OF TOTAL BEDNIGHTS, BY ACCOMMODATION TYPE**

| | | Share of Total Bednights | | |
|---|---|---|---|---|
| | | Q4 2022 | Q4 2023 | Q4 2024 |
| Accommodation Type | Friends / Relatives | 70.7% | 62.4% | 62.4% |
| | Guest House | 10.0% | 11.0% | 11.7% |
| | Holiday Home | 2.4% | 0.8% | 10.2% |
| | Hotel | 4.5% | 8.7% | 6.0% |
| | Lodge | 2.8% | 4.5% | 4.3% |
| | Self-Catering | 4.8% | 3.7% | 2.6% |
| | B&B | 1.4% | 2.9% | 0.9% |
| | Camping | 1.6% | 2.5% | 0.7% |
| | Halls | 0.0% | 1.4% | 0.3% |
| | AirBnB | 0.6% | 2.1% | 0.3% |
| | Hostel | 0.3% | 0.0% | 0.1% |
| | Hospital | 0.8% | 0.0% | 0.1% |

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