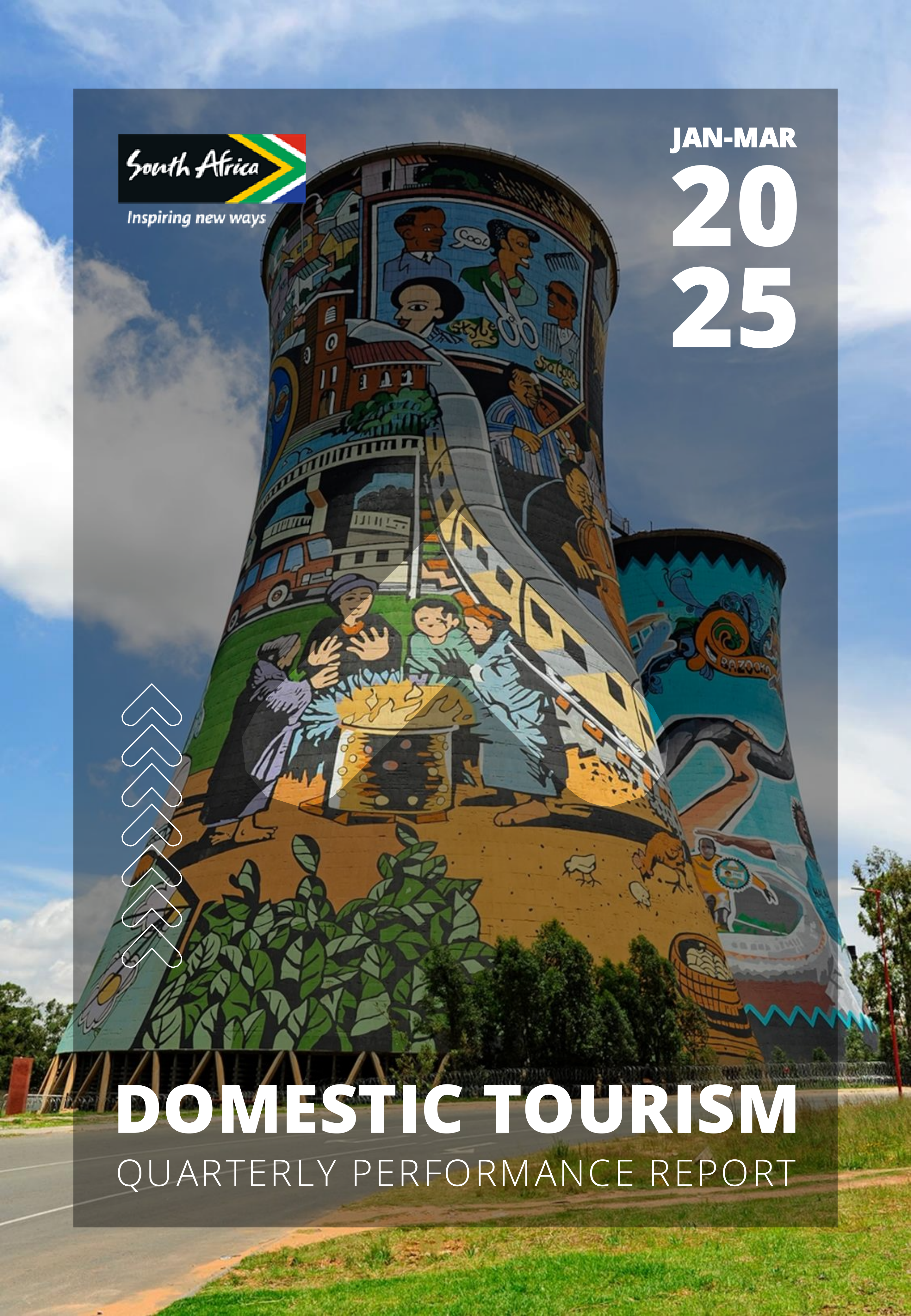
South Africa
Inspiring new ways

JAN-MAR
2025



DOMESTIC TOURISM
QUARTERLY PERFORMANCE REPORT

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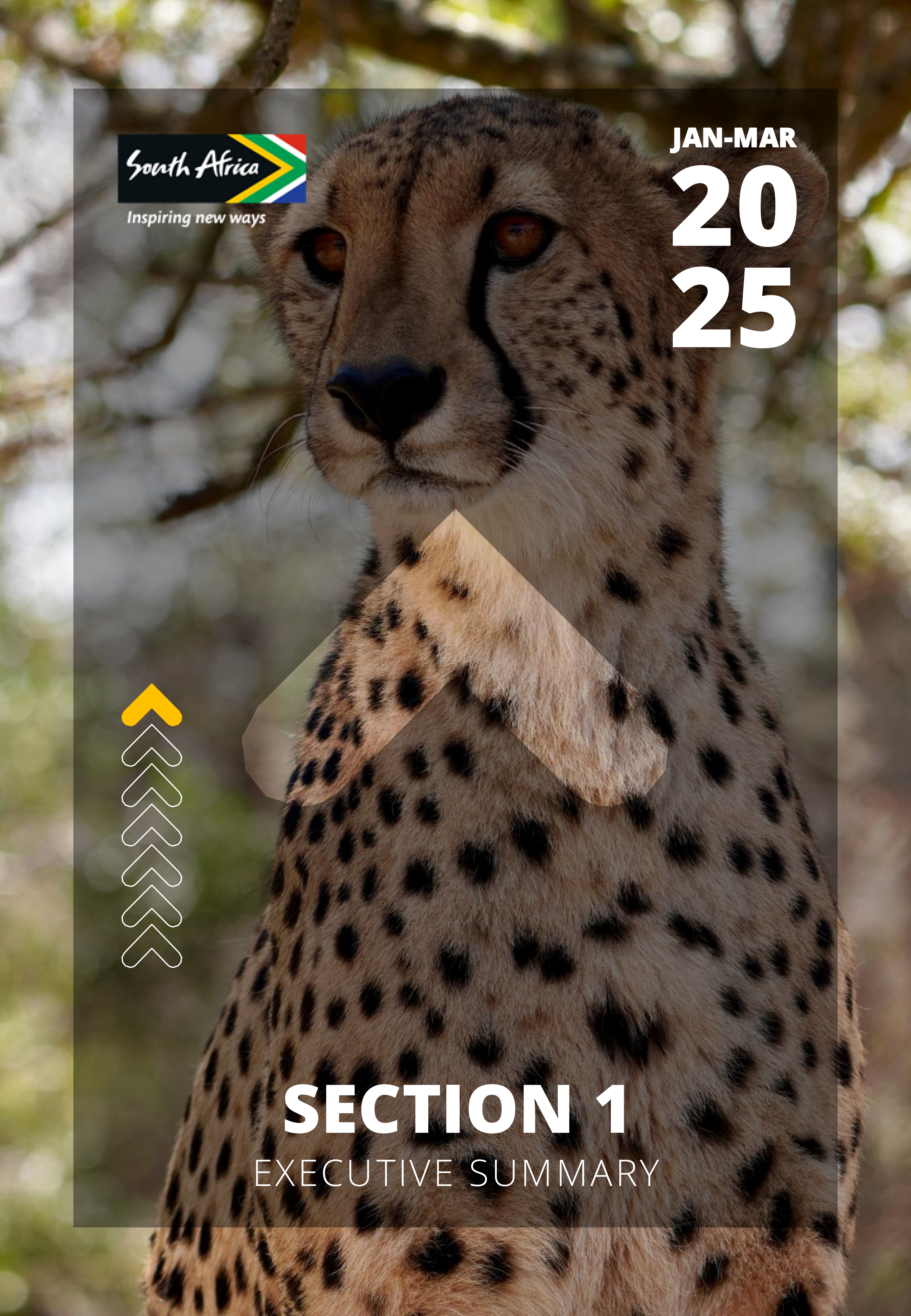

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JAN-MAR 2025

SECTION 1

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

CONTEXT: DOMESTIC TRAVEL PATTERNS – Q1 2025 VS. Q1 2024

When interpreting domestic travel trends for **Q1 2025**, it is important to consider the timing of public and school holidays, which differ significantly from the same period in 2024.

In **Q1 2024**, the clustering of the Easter long weekend, Human Rights Day, and the majority of the school term break within March likely contributed to elevated travel activity during that month.

In contrast, the **2025 calendar** sees both the Easter holidays and the bulk of the school break shift entirely into April. While March 2025 still includes a long weekend around Human Rights Day, the absence of Easter-related travel in that month may influence lower observed travel figures for March 2025 and Q1 2025 overall. This temporal shift suggests that stronger travel volumes may instead materialise in April, which falls into Q2 2025.

DOMESTIC OVERNIGHT OVERVIEW

Domestic overnight trips dropped by 2.4% in Q1 2025, showing a slight downward trend from 8.7 million in Q1 2023 to 8.5 million in Q1 2024 and 8.3 million in Q1 2025.

The number of domestic tourists grew marginally by 3.7%, reaching 7.9 million—up from 7.7 million in Q1 2024 and 7.8 million in Q1 2023. The average number of trips per domestic tourist remained steady at around one trip per person, consistent with the 1.1 average reported in both Q1 2024 and Q1 2023.

VFR remained the main purpose for overnight trips and showed a strong increase in share, from 41.6% in Q1 2024 to 59.2% in Q1 2025. The share of holiday trips, however, fell to 18.2%.

During Q1 2025, 4.9 million trips were made for VFR purposes (up by 39.0%). Its spend reached R8.3 billion, and bed nights increased to 15.1 million. Despite a drop in overall spending, holiday trips recorded the highest total spend at R 8.6 billion, with average spend rising to R 5,691.

Domestic overnight spending declined by 14.9% in Q1 2025, from R 26.0 billion to R 22.1 billion compared to Q1 2024, reaching levels similar to Q1 2023 (R23.5 billion). Spending by holidaymakers and VFR travellers accounted for 76.8% of total domestic spending. VFR spending rose from R 7.8 billion to R 8.3 billion. In contrast, professional, MICE, and religious tourism all experienced declines in spending.

Personal shopping and leisure & entertainment spending recorded the most significant growth. Personal shopping spend increased from R 1.5 billion to R 4.4 billion, while leisure & entertainment spend rose from R 613.9 million to R 1.4 billion. Accommodation saw a substantial decrease of -45.0%, down to R 1.7 billion in Q1 2025.

Domestic bed nights declined slightly by -6.7%, dropping from 29.2 million to 27.2 million compared to Q1 2024.

Continued...

EXECUTIVE SUMMARY

PROVINCIAL DOMESTIC OVERNIGHT OVERVIEW

KwaZulu-Natal emerged as the leading main destination province, recording the highest number of overnight trips at 1.9 million (an increase of 60.9%). It also reported the highest total spend at R 6.1 billion (up by 48.7%), and the most bed nights at 4.9 million (up by 38.5%).

Limpopo and Gauteng followed as the next best-performing main destination provinces. Limpopo recorded 1.5 million trips, making it the second-most visited province. It also had the third-highest total spend at R 3.0 billion (an increase of 75.4%). Gauteng recorded the second-highest total spend at R 3.4 billion and the highest average spend at R 3,912. It also reported 4.4 million bed nights, with a length of stay increasing by 49.6% to five nights.

The Western Cape and Mpumalanga both experienced declines in total spend, yet still performed relatively well, each contributing R 2.7 billion in total spend.

The North West experienced a significant decline in total spend, dropping by 76.5% from R3.8 billion to R 884.8 million, along with a 66.5% decrease in average spend—from R 4,489 to R 1,505.

DOMESTIC DAY TRIPS

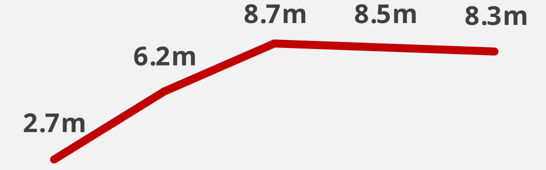
Domestic day trips saw moderate growth of 2.2%, reaching 27.1 million, almost identical to the number of trips recorded in Q1 2024.

VFR, personal shopping, and holidays were the main purposes for day trips. VFR increased to 8.4 million day trips in Q1 2025, while holidays remained steady at 5.6 million. Personal shopping grew to 6.0 million day trips.

Professional and business-related travel experienced a significant drop, decreasing by 31.8% to 2.3 million day trips.

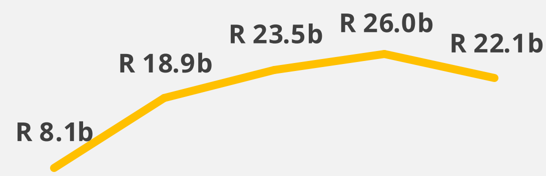
HEADLINE INDICATORS

OVERNIGHT TRIPS



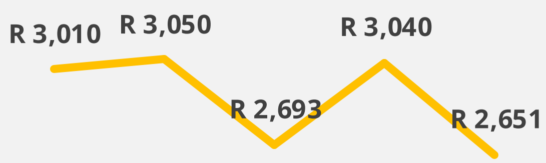
8.3m
-2.4%

OVERNIGHT SPEND



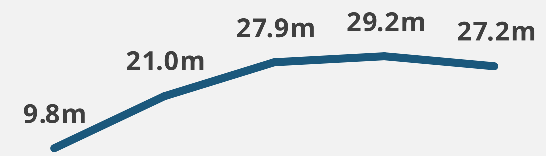
R 22.1b
-14.9%

AVG. OVERNIGHT SPEND



R 2,651
-12.8%

BEDNIGHTS

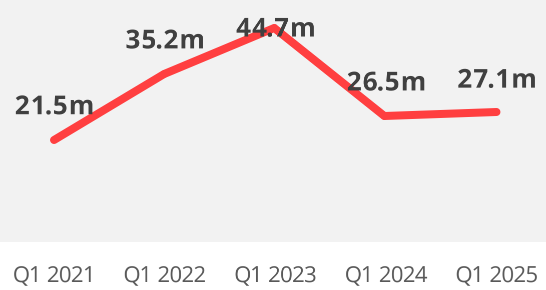


27.2m
-6.7%

LENGTH OF STAY

3.3
-4.4%

DAY TRIPS



27.1m
+2.2%

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SECTION 2
ABOUT THE REPORT

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.

BACKGROUND

Since 2007, South African Tourism has commissioned a monthly household survey, the Domestic Tourism Survey (DTS) to measure the incidence and the value and volume of domestic tourism in South Africa and to understand domestic travel behaviour amongst the adult population.

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.

The key domestic travel indicators measured are:

- **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?

OBJECTIVES

The key objectives of the DTS are to:

- Determine the incidence of travel amongst 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 expenditure into account.
- Identify the reasons for travelling and not travelling.
- Identify the incidence of province choice and reasons for choosing that particular province.

BACKGROUND

SURVEY ARCHITECTURE

The DTS sample is designed as a nationally-representative, multi-stage, stratified probability sample of South African adults aged 18 years and older.

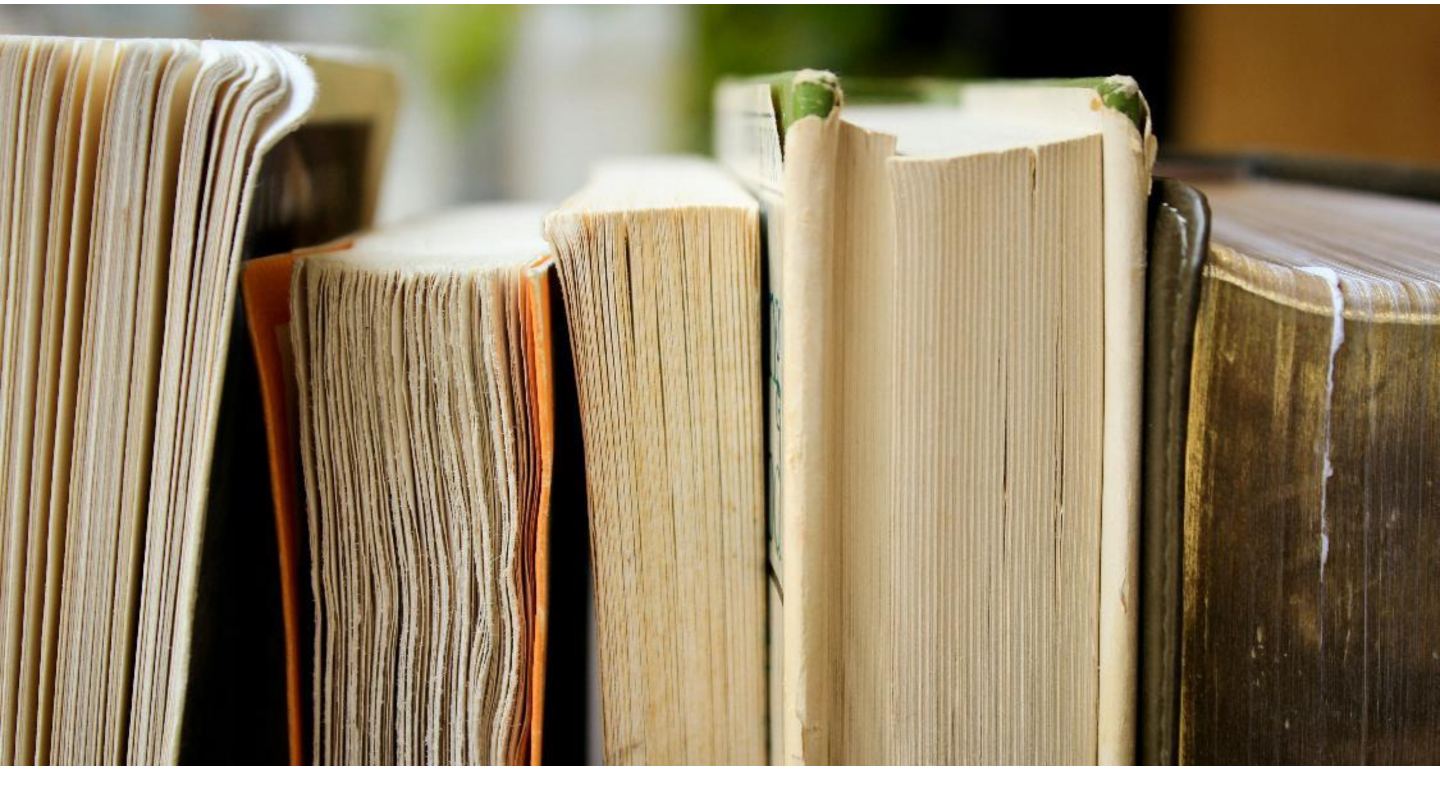
The monthly sample consists of 1,300 adult respondents, and data is collected through face-to-face interviews conducted in the respondent's home.

The core architecture of the survey achieves the following:

- Provides coverage of both locales and people through a multi-stage stratified probability sampling strategy, with Probability Proportionate to Size (PPS) sampling at higher stages of the sampling hierarchy and Equal Probability Selection Methods (EPSEM) at the lower stages.
- The sample is stratified by Province, Race, Geographic areas (Metro, Urban, and Rural), Enumeration Area (EA) Type, Main Place and Sub-place.
- The primary sampling units (EAs) are selected using PPS, following which the individual households are selected using EPSEM. Individual respondents within households are selected using the Kish grid, and reweighting is used to account for non-response.
- A comprehensive geographical sample frame is used as the basis to structure the PPS selection of EAs. This is essential to permit vertical analysis of returned data by geographical area (EAs, Sub-Place, Main Place, Geo-type, Province) and thus achieve national, provincial and sub-provincial resolution.
- Sample weighting is achieved using the latest mid-year estimates from Stats SA, and by use of various weighting techniques, such as the integrated weighting technique and calibration weighting.
- Every iteration of the survey (monthly, quarterly and annually) is weighted to national population statistics and benchmarked in terms of population group, age, and gender.

ADDITIONAL SOURCES

- Statistical Release P0141: Consumer Price Index. January 2025. Statistics South Africa.
- Statistical Release P0141: Consumer Price Index. February 2025. Statistics South Africa.
- Statistical Release P0141: Consumer Price Index. March 2025. Statistics South Africa.
- Statistical Release P0441: Gross Domestic Product – Fourth quarter 2024. 04 March 2025. Statistics South Africa.
- Statistical Release P6410: Tourist accommodation (Preliminary). January 2025. Statistics South Africa.
- Statistical Release P0211 : Quarterly Labour Force Survey (QLFS) – Q1: 2025. 13 May 2025. Statistics South Africa.
- https://www.resbank.co.za/en/home/what-we-do/statistics/key-statistics/current-market-rates

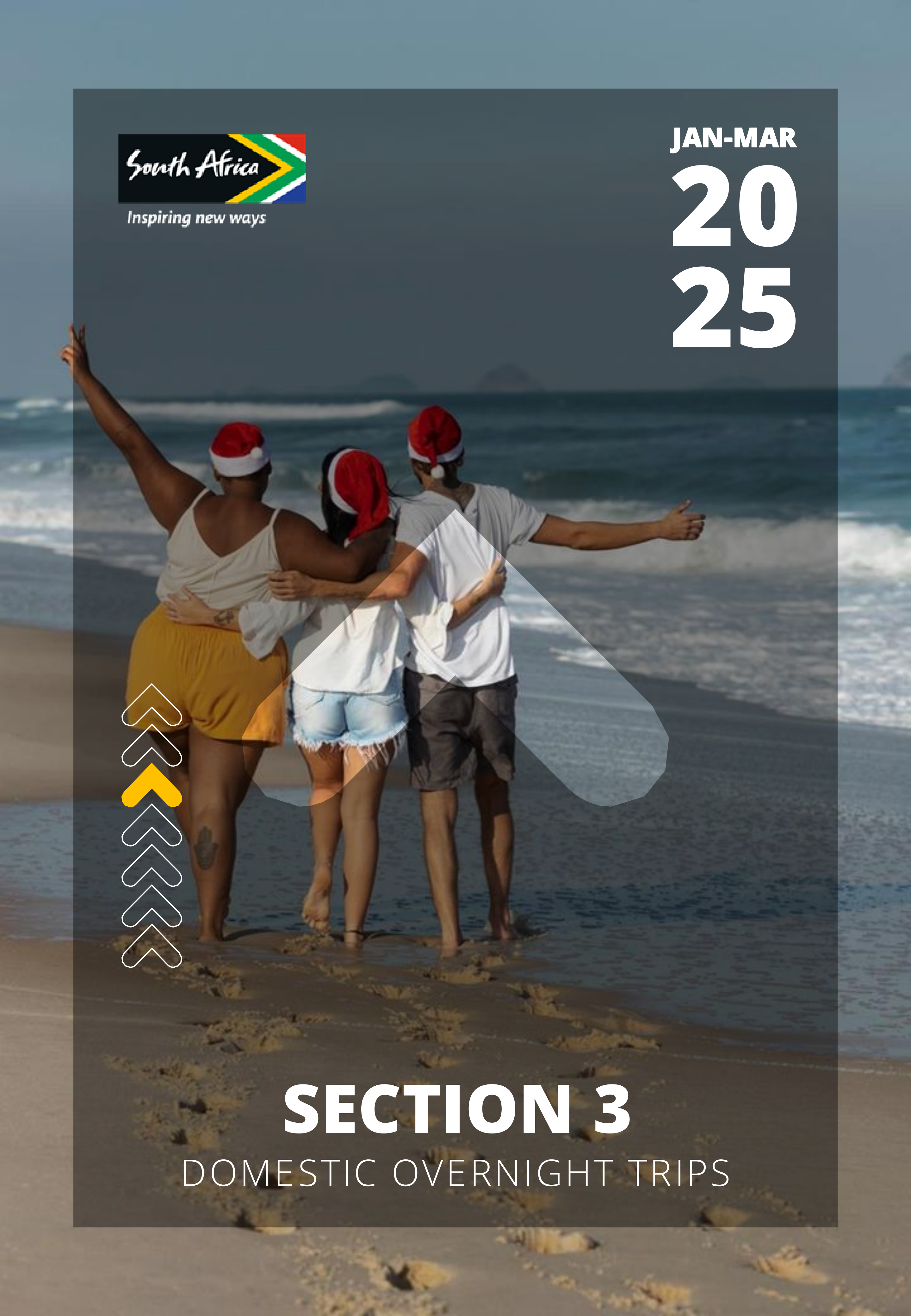


DISCLAIMER

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.



JAN-MAR

2025

SECTION 3

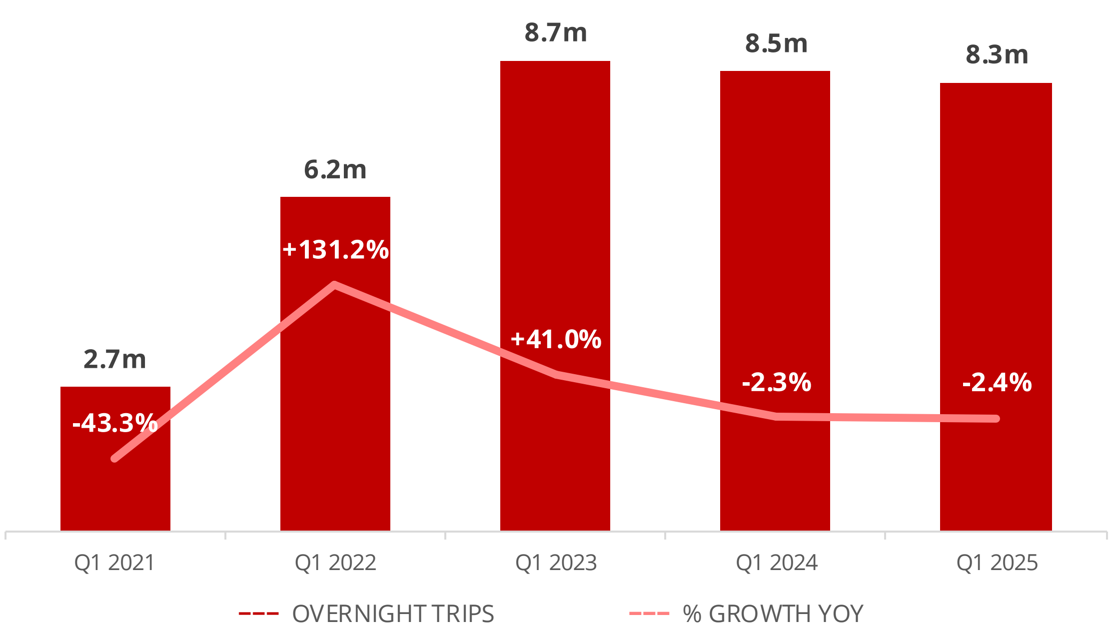
DOMESTIC OVERNIGHT TRIPS

OVERNIGHT TRIPS 8.3m -2.4%

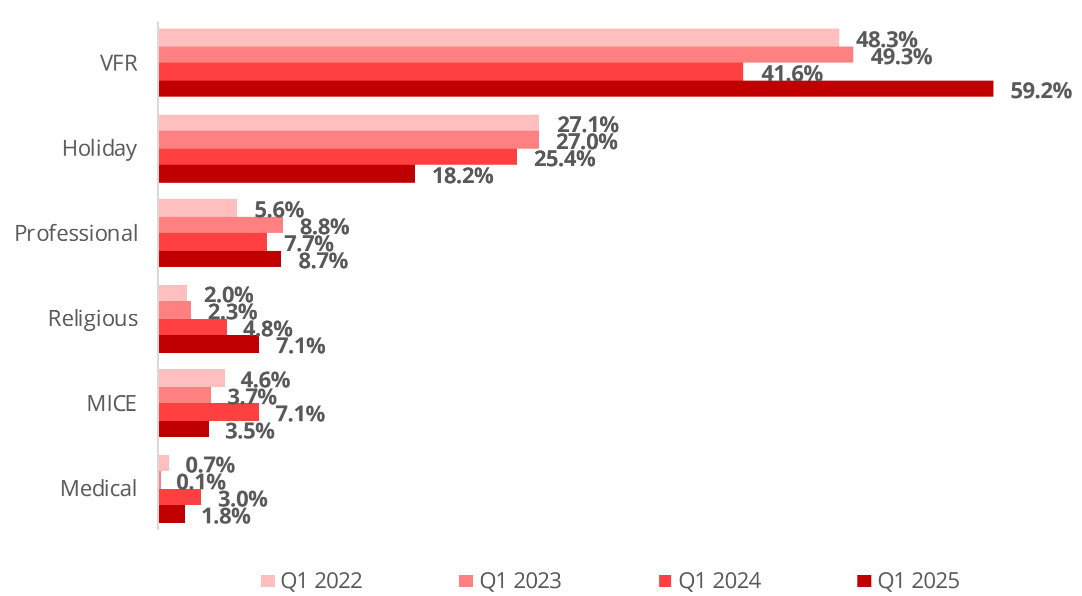
These are tentative signs of a slowdown in the momentum of overnight trips after a period of growth from Q1 2021 to Q1 2023. Domestic trips show a slight downward trend, decreasing by -2.4% in Q1 2025 to 8.3 million trips compared to Q1 2024, following a -2.3% decrease in Q1 2024.

VFR remained the main purpose for overnight trips and showed a strong increase in share—from 41.6% in Q1 2024 to 59.2% in Q1 2025. Trips for religious purposes continued a marginal upward trend, rising from a 2.3% share in Q1 2023 to 4.8% in Q1 2024, and reaching 7.1% in Q1 2025. The share of holiday trips fell from 25.4% to 18.2%. MICE trips declined from their share of 7.1% in Q1 2024 to 3.5% in Q1 2025.

OVERNIGHT TRIPS: Q1 2021 – Q1 2025



SHARE OF OVERNIGHT TRIPS BY PURPOSE: Q1 2022 – Q1 2025



OVERNIGHT TRIPS 8.3m -2.4%

VFR	
Trips	4.9m +39.0%
Spend	R 8.3b +7.3%
Spend per trip	R 1,686 -22.8%
Bednights	15.1m +11.3%
Length of stay	3.1 -19.9%
Share	59.2%

HOLIDAY	
Trips	1.5m -30.2%
Spend	R 8.6b -3.8%
Spend per trip	R 5,691 +37.8%
Bednights	5.9m -13.3%
Length of stay	3.9 +24.2%
Share	18.2%

MICE	
Trips	294k -51.5%
Spend	R 1.1b -43.8%
Spend per trip	R 3,775 +15.9%
Bednights	1.2m -10.0%
Length of stay	4.2 +85.7%
Share	3.5%

During Q1 2025, 4.9-million trips were made for VFR purposes, a strong increase of 39% compared to Q1 2024.

This increase resulted in a 59.2% share of travel and a phenomenal increase of 42.5% in share compared to Q1 2024. The results suggest that when VFR travel share increases, holiday travel share is most likely to decrease.

VFR spend rose by 7.3% to reach R8.3-billion in Q1 2025, but the average spend per trip decreased substantially by -22.9% to R1,688 (from R2,190).

The number of bednights increased considerably by 11.1%, from 13.6-million to 15.1-million in Q1 2025. The average length of stay fell by 19.9%, from 3.8 to 3.1 nights in the same period.

The holiday category's share of total trips declined by -28.5%, from 25.4% in Q1 2024 to 18.2% in Q1 2025. Total trips for holidays declined by -30.2% for the same period.

Although the length of stay increased by 24.2%, bednights experienced a decline of -13.2%, from 6.8-million to 5.9-million over the same period. This suggests that fewer people are going on holiday trips, but they are staying for longer periods.

The total spend on holiday trips shrank by -3.8% to R8.6-billion, while the average spend rose significantly by 38.8%, from

R 4,130 to R5,691, compared to Q1 2024.

MICE accounted for 3.5% of total domestic trips in Q1 2025, reflecting a substantial decline in share by -50.3%, after virtually doubling its share in Q1 2024.

The number of MICE trips declined from 608k to 294k, a significant drop of -51.5% compared to Q1 2024.

Total spending also experienced a substantial decline, falling from R2-billion to R1-billion, while the average spend per trip increased by 15.9%, reaching R3,775.

The most notable growth was the dramatic rise in length of stay (+85.7%), from 2.3 nights to 4.2 nights in Q1 2025. Bednights, however, declined by -10% over the same period.

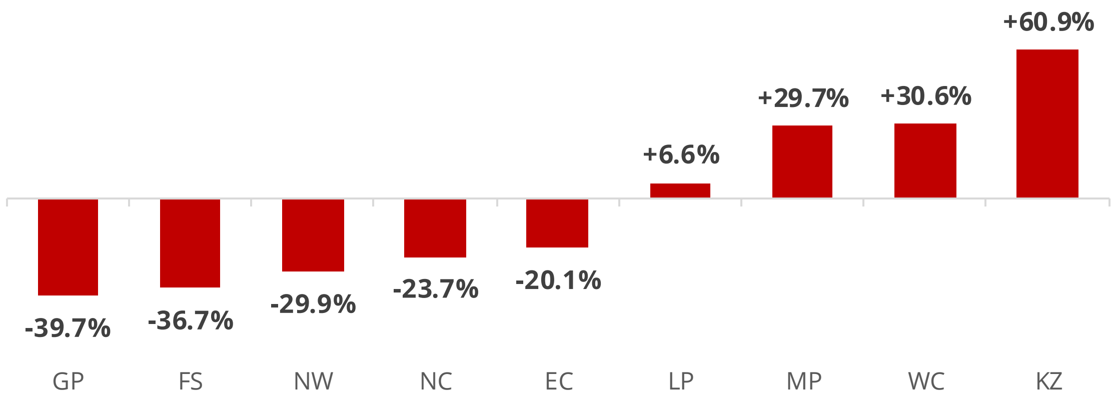
OVERNIGHT TRIPS 8.3m -2.4%

A number of provinces experienced a downturn in growth rates for main destination provinces when compared to Q1 2024. Gauteng (-39.7%) and the Free State (-36.7%) recorded the largest declines. Other provinces, with declines below 30%, include the North West (-29.9%), Northern Cape (-23.7%), and the Eastern Cape (-20.1%).

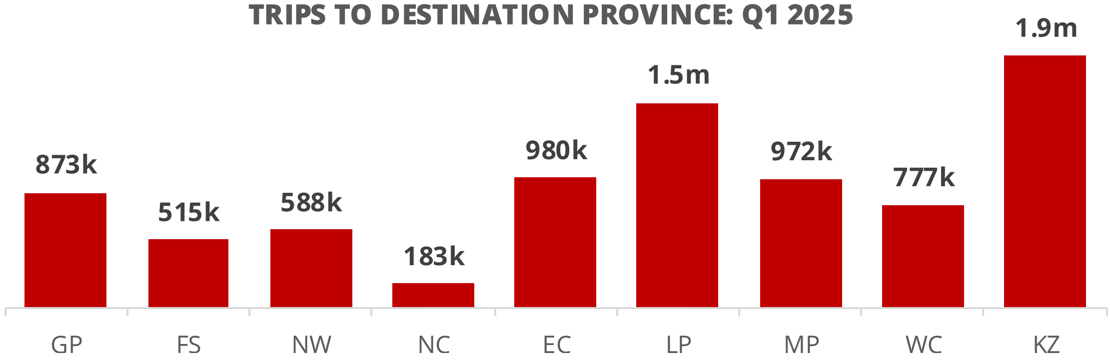
KwaZulu-Natal (+60.9%) experienced the highest growth, followed by the Western Cape (+30.6%), Mpumalanga (+29.7%), and Limpopo (+6.6%). Together, the provinces that showed positive growth accounted for 62.4% (5.2-million) of the total number of trips in Q1 2025. KwaZulu-Natal saw an increase in the number of trips from 970k in Q1 2023 to 1.9-million in Q1 2025, reflecting a strong upward trend. Limpopo remained steady at 1.5-million trips, while Mpumalanga approached the one-million mark with 972k trips.

The Eastern Cape is showing a gradual decline, with the number of trips decreasing from 1.3-million in Q1 2023 to 980k in Q1 2025. A similar downward trend is evident for Gauteng, where trips dropped from 2.2-million in Q1 2023 to 873,000 in Q1 2025.

DESTINATION PROVINCE GROWTH RATE: Q1 2024 v Q1 2025



TRIPS TO DESTINATION PROVINCE: Q1 2025



TRIPS TO DESTINATION PROVINCE: Q4 2022 – Q4 2024

	GP	FS	NW	NC	EC	LP	MP	WC	KZ
Q1 2023	2.2m	550k	466k	128k	1.3m	1.8m	470k	829k	970k
Q1 2024	1.4m	812k	839k	240k	1.2m	1.5m	749k	595k	1.2m
Q1 2025	873k	515k	588k	183k	980k	1.5m	972k	777k	1.9m

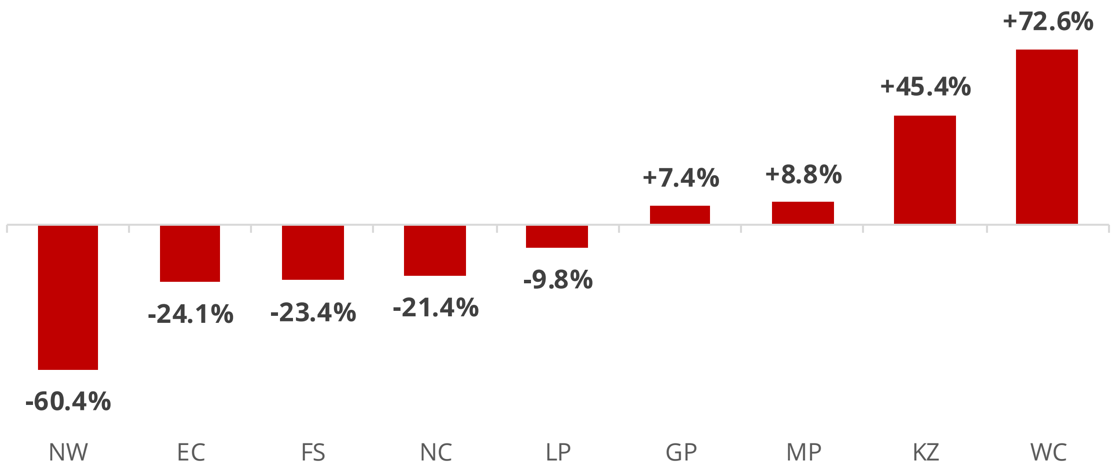
OVERNIGHT TRIPS 8.3m -2.4%

In Q1 2025, four provinces experienced growth as source provinces, namely the Western Cape, KwaZulu-Natal, Mpumalanga, and Gauteng. The Western Cape (+72.6%) and KwaZulu-Natal (+45.5%) recorded significant growth in Q1 2025 compared to Q1 2024. Mpumalanga and Gauteng increased by 8.8% and 7.4%, respectively. Mpumalanga grew to 498k trips as a province of origination—nearly matching its Q1 2022 figure of 499k trips.

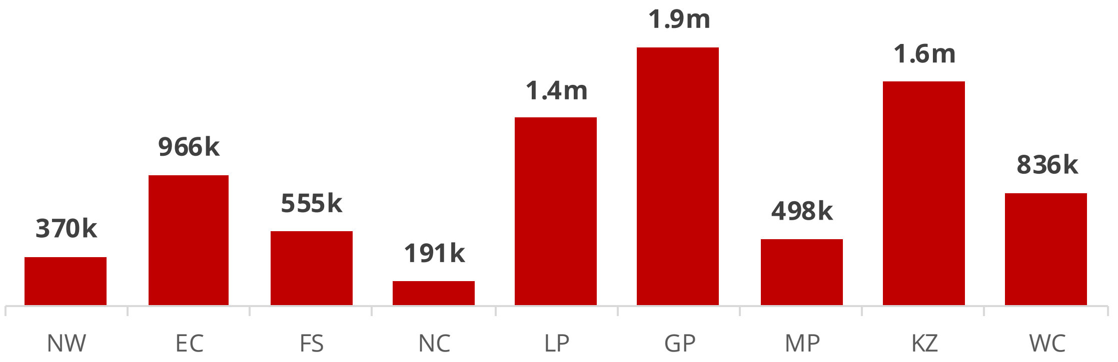
The North West experienced the steepest decline, with a drop of 60.4%, falling from 937k trips to 370k. The Eastern Cape, Free State, and Northern Cape all recorded declines in growth, ranging from -21.4% to -24.1%, while Limpopo experienced a smaller drop compared to Q1 2024.

Gauteng and KwaZulu-Natal, with 1.9-million and 1.6-million overnight trips respectively, remain the major source provinces for overnight travel. Despite negative growth rates, Limpopo (1.4-million trips) and the Eastern Cape (966k trips) continue to be important contributors.

SOURCE PROVINCE GROWTH RATE: Q1 2024 v Q1 2025



TRIPS FROM SOURCE PROVINCE: Q1 2025



TRIPS FROM SOURCE PROVINCE: Q4 2022 – Q4 2024

	NW	EC	FS	NC	LP	GP	MP	KZ	WC
Q1 2023	555k	979k	361k	210k	2.2m	2.3m	400k	1.0m	707k
Q1 2024	937k	1.3m	724k	242k	1.5m	1.8m	458k	1.1m	484k
Q1 2025	370k	966k	555k	191k	1.4m	1.9m	498k	1.6m	836k

OVERNIGHT TRIPS

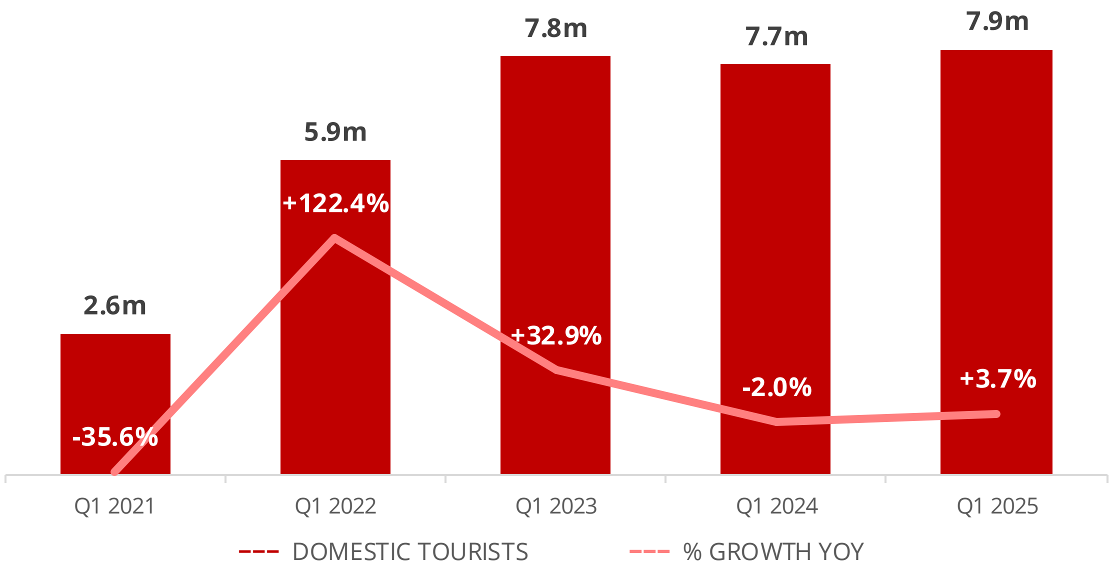
8.3m **-2.4%**

In Q1 2025, the number of domestic tourists grew marginally by 3.7%, reaching 7.9-million — up from 7.7-million in Q1 2024 and 7.8-million in Q1 2023.

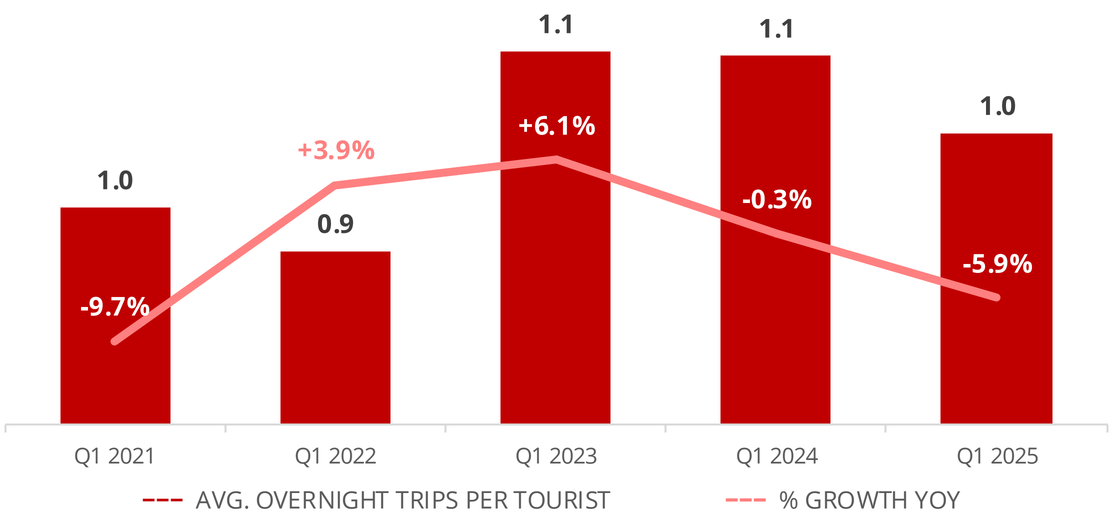
Although the average number of trips per domestic tourist declined slightly by -5.9%, it remains steady at around one trip per person, consistent with the 1.1 average reported in both Q1 2024 and Q1 2023.

While the growth in domestic tourist numbers is modest, it nonetheless reflects a degree of momentum and stability.

DOMESTIC TOURISTS: Q1 2021 – Q1 2025



AVG. OVERNIGHT TRIPS PER TOURIST: Q1 2021 – Q1 2025



OVERNIGHT TRIPS 8.3m -2.4%

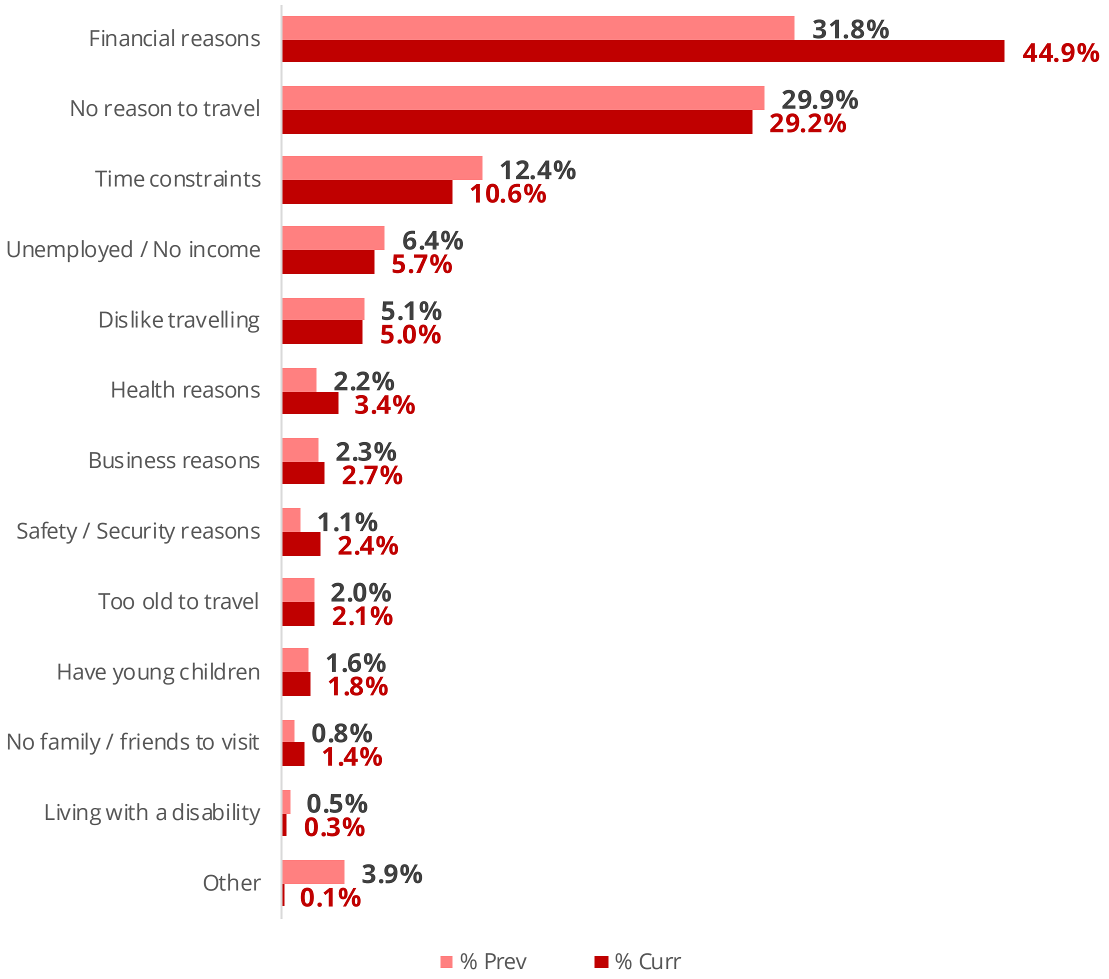
Of the four primary reasons for not travelling, financial constraints were the only factor that saw a sharp increase—rising by 13.1 percentage points from 31.8% in Q1 2024 to 44.9% in Q1 2025.

In contrast, "no reason to travel" (29.2%), time constraints (10.6%), and being unemployed or having no income (5.7%) all showed moderate declines compared to Q1 2024.

Although concerns about safety and security rose slightly to 2.4%, they continue to be a relatively minor factor in travel decisions.

Collectively, the top four reasons for not travelling accounted for 90.4% of responses, with financial reasons alone making up nearly half of that total.

MAIN REASONS FOR NOT TRAVELLING: Q1 2025



DOMESTIC SPEND R 22.1b -14.9%

Domestic overnight spending declined by -14.9% in Q1 2025, from R26.0-billion to R22.1-billion, compared to Q1 2024, reaching levels similar to Q1 2023 (R 23.5-billion).

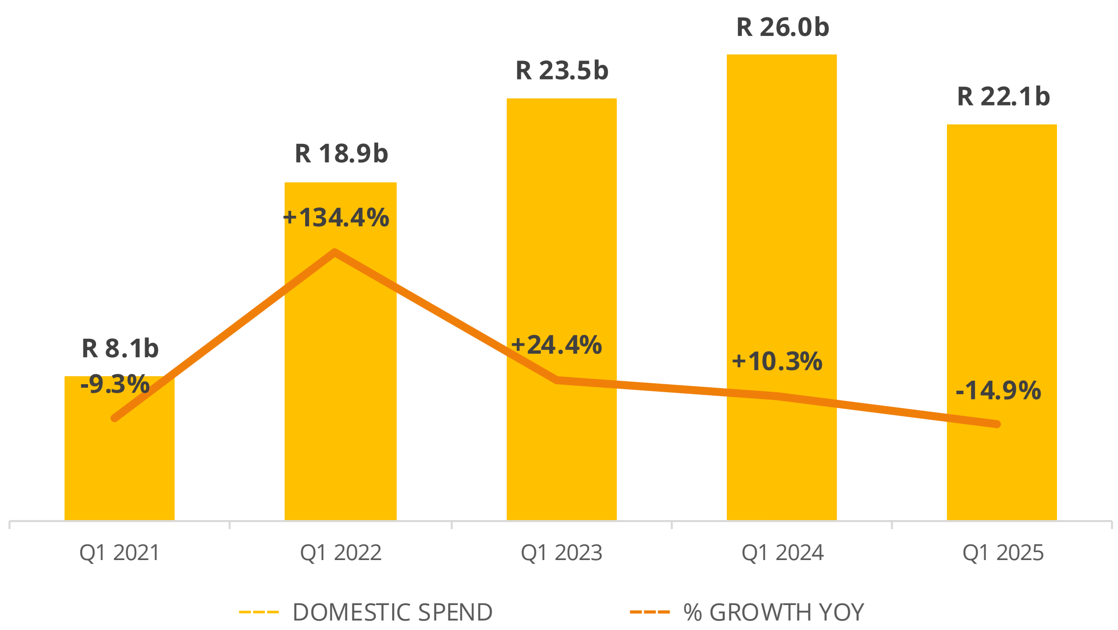
In Q1 2025, spending by holidaymakers and VFR accounted for 76.8% of total domestic spending.

Although the holiday category's share of spend increased by 13%, rising to 39.1%, actual holiday spend declined from R9.0-billion to R8.6-billion compared to Q1 2024. VFR experienced a rise in spend from R7.8-billion to R8.3-billion, with its share increasing from 29.9% to 37.7% over the same period.

Professional (-34.7%), MICE (-43.8%), and religious (-14.9%) tourism all experienced declines in spending. Both professional and MICE categories also saw a decrease in their share of overnight spend.

Domestic overnight travel spending in Q1 2025 showed clear signs of strain. The data points to a cautious domestic market, likely impacted by financial pressures and shifting travel behaviours.

DOMESTIC SPEND: Q1 2021 – Q1 2025



DOMESTIC SPEND BY PURPOSE: Q1 2024 v Q1 2025

	Q1 2024	Q1 2025	% 2024	% 2025
Holiday	R 9.0b	R 8.6b	34.6%	39.1%
VFR	R 7.8b	R 8.3b	29.9%	37.7%
Professional	R 3.8b	R 2.5b	14.5%	11.2%
MICE	R 2.0b	R 1.1b	7.6%	5.0%
Religious	R 1.2b	R 990.2m	4.5%	4.5%

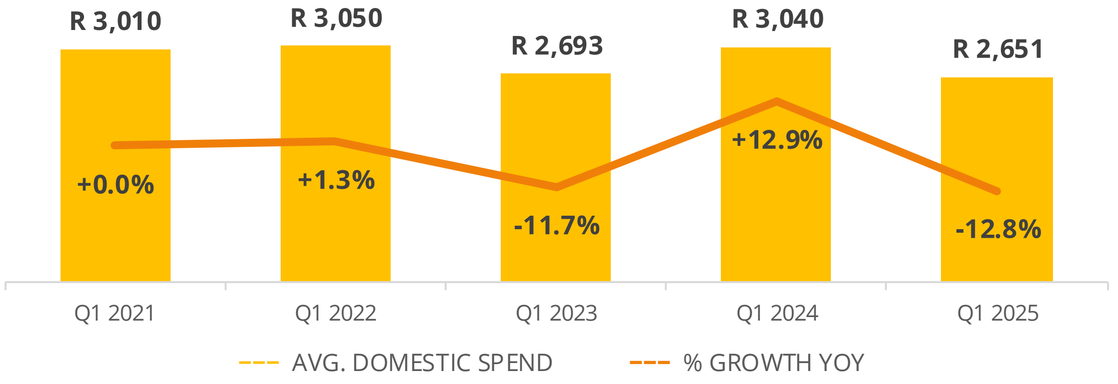
DOMESTIC SPEND **R 22.1b** -14.9%

In Q1 2025, the average domestic spend per trip decreased by -12.8%, down from an average of R 3,040 (in Q1 2024) to R2,651. At R2,651, average domestic spend in Q1 2025 was the lowest recorded across the Q1 periods from 2021 to 2025.

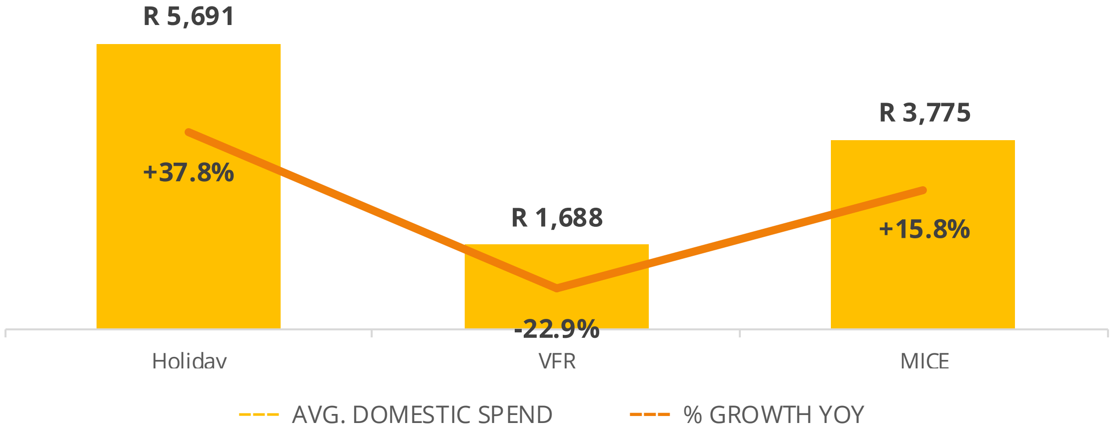
The average domestic overnight spend increased for both the Holiday (+37.8%) and MICE (+15.8%) categories, compared to Q1 2024. Holiday spending rose to an average of R5,691, while the average MICE spending reached R3,775.

Although VFR total spend grew by 7.3% in Q1 2025, the average spend declined by -22.9%, reaching an average of R1,688 from its previous average of R2,190 (in Q1 2024).

AVG. DOMESTIC SPEND: Q1 2021 – Q1 2025



AVG. DOMESTIC SPEND BY PURPOSE: Q1 2025



DOMESTIC SPEND R 22.1b -14.9%

This quarter, personal shopping and leisure & entertainment spending recorded the most significant growth, rising by 198.3% and 120.5%, respectively, compared to Q1 2024. Personal shopping spend increased from R1.5-billion to R4.4-billion, while leisure & entertainment spend rose from R613.9-million to R1.4-billion. Transport remains the largest expenditure category, with a modest increase of 4.2%, reaching R6.4-billion.

Accommodation saw a substantial decrease of -45.0%, declining from R3.1-billion in Q1 2024 to R1.7-billion in Q1 2025. Food & beverage experienced a modest decline of -0.5%.

While leisure-related discretionary spending increased significantly, the sharp decline in accommodation spending (-45%) and the modest growth in transport (+4.2%) point to shifting travel behaviour most likely influenced by financial pressures. Leisure & entertainment spend going up suggests that travellers are still interested in experiences and spoiling themselves.

DOMESTIC SPEND BY CATEGORY: Q1 2024 v Q1 2025

	Q1 2024	Q1 2025	
TRANSPORT	R 6.1b	R 6.3b	+4.2%
PERSONAL SHOPPING	R 1.5b	R 4.4b	+198.3%
FOOD & BEVERAGES	R 4.3b	R 4.3b	-0.5%
ACCOMMODATION	R 3.1b	R 1.7b	-45.8%
LEISURE & ENTERTAINMENT	R 613.9m	R 1.4b	+120.5%

BEDNIGHTS

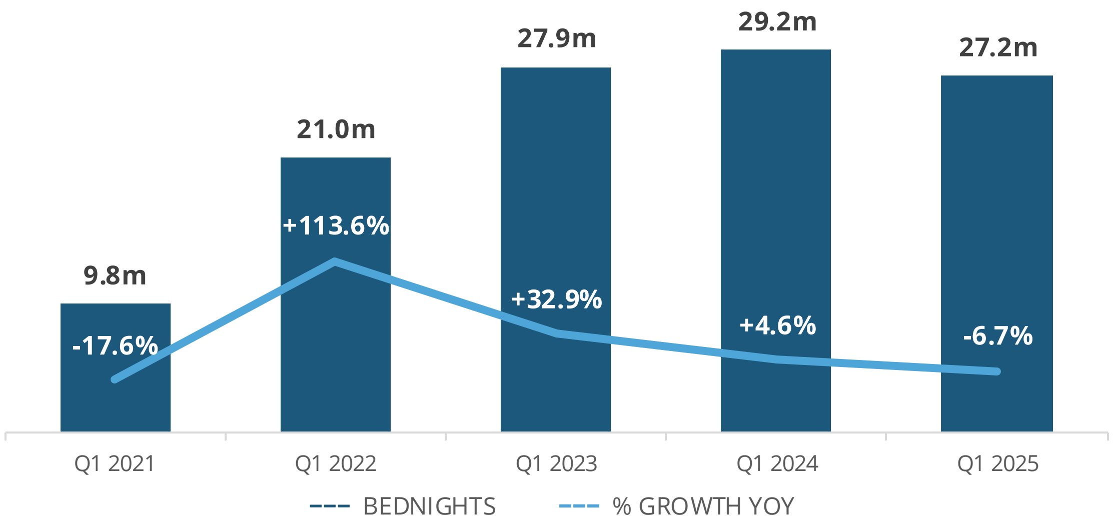
27.2m **-6.7%**

In Q1 2025, domestic bednights declined slightly by -6.7%, dropping from 29.2-million to 27.2-million compared to Q1 2024. The average length of stay also saw a modest decline of -4.4%, decreasing from an average of 3.4 nights to 3.3 nights in the same period.

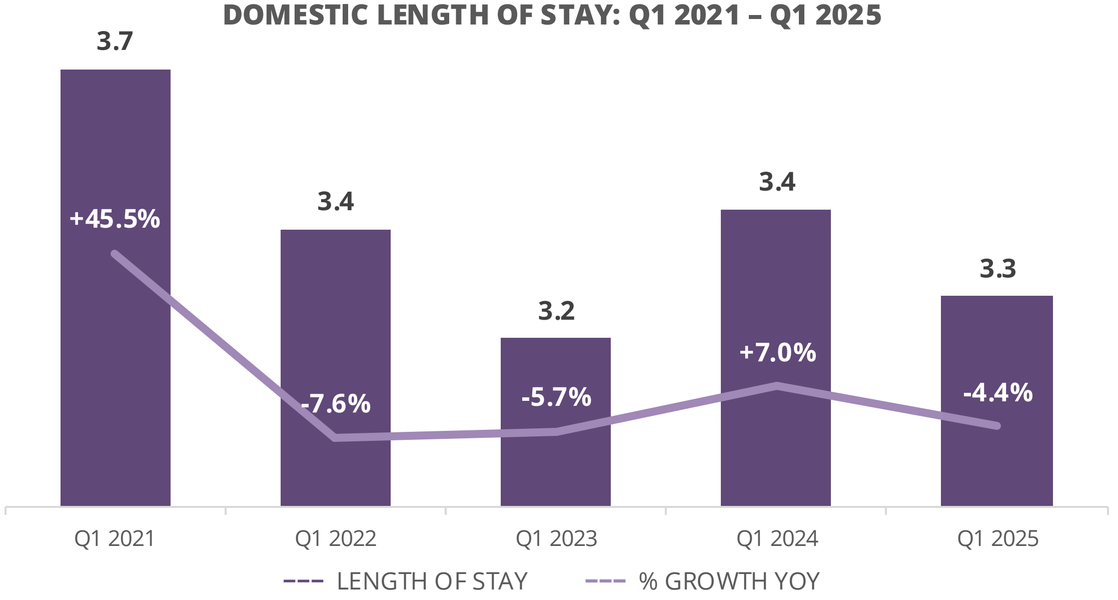
The results suggest that fewer people are travelling (as indicated by the decline in bednights), and that those who are travelling are spending less time at their destinations.

The slight downturn in domestic travel behaviour could reflect economic pressures or seasonal factors.

DOMESTIC BEDNIGHTS: Q1 2021 – Q1 2025



DOMESTIC LENGTH OF STAY: Q1 2021 – Q1 2025



JAN-MAR 2025

SECTION 4

PROVINCIAL PERFORMANCE

PROVINCES

In the first quarter of 2025, KwaZulu-Natal emerged as the leading main destination province, recording the highest number of overnight trips at 1.9 million (an increase of 60.9%). It also reported the highest total spend at R6.1 Billion (up by 48.7%), the most bednights at 4.9 million (up by 38.5%), and the third-highest average spend at R3,215.

Limpopo and Gauteng followed as the next best-performing main destination provinces.

Limpopo recorded 1.5 million trips, making it the second-most visited province. It also had the third-highest total spending at R3.0 Billion (an increase of 75.4%), an average spending of R1,947, the third-highest number of bed nights at 4.5 million, and an average stay of 2.9 nights.

Although Gauteng had a lower total number of overnight trips, it recorded the second-highest total spend at R3.4 Billion and the highest average spend at R3,912. It also reported 4.4 million bed nights, with a length of stay increasing by 49.6% to five nights.

The Western Cape (-16.4%) and Mpumalanga (-15.8%) both experienced declines in total spending compared to Q1 2024, yet still performed relatively well, each contributing R2.7 billion in total spending. Despite a 36% drop in average spending, the Western Cape still reported the second-highest average spending, at R3,423, in Q1 2025.

The Eastern Cape approached one million trips (980k), while the Free State (515k) and North West (588k) recorded comparatively fewer trips. The North West experienced a significant decline in total spend, dropping by 76.5% from R3.8 Billion to R884.8 Billion, along with a 66.5% decrease in average spend from R4,489 in Q1 2024 to R1,505 in Q1 2025.

Although the Northern Cape did not lead in terms of trip numbers or expenditure, it stood out with the longest average length of stay, with visitors spending an average of 5.6 nights in the province in Q1 2025.

OVERNIGHT TRIP PERFORMANCE INDICATORS BY MAIN DESTINATION PROVINCE: Q1 2025

	TRIPS	SPEND	AVG SPEND	BEDNIGHTS	LOS
EC	980k	R 1.7b	R 1,693	2.4m	2.5
FS	515k	R 1.1b	R 2,123	1.9m	3.7
GP	873k	R 3.4b	R 3,912	4.4m	5.0
KZ	1.9m	R 6.1b	R 3,215	4.9m	2.6
LP	1.5m	R 3.0b	R 1,947	4.5m	2.9
MP	972k	R 2.7b	R 2,781	3.9m	4.0
NC	183k	R 561.2m	R 3,069	1.0m	5.6
NW	588k	R 884.8m	R 1,505	1.6m	2.7
WC	777k	R 2.7b	R 3,423	2.7m	3.4

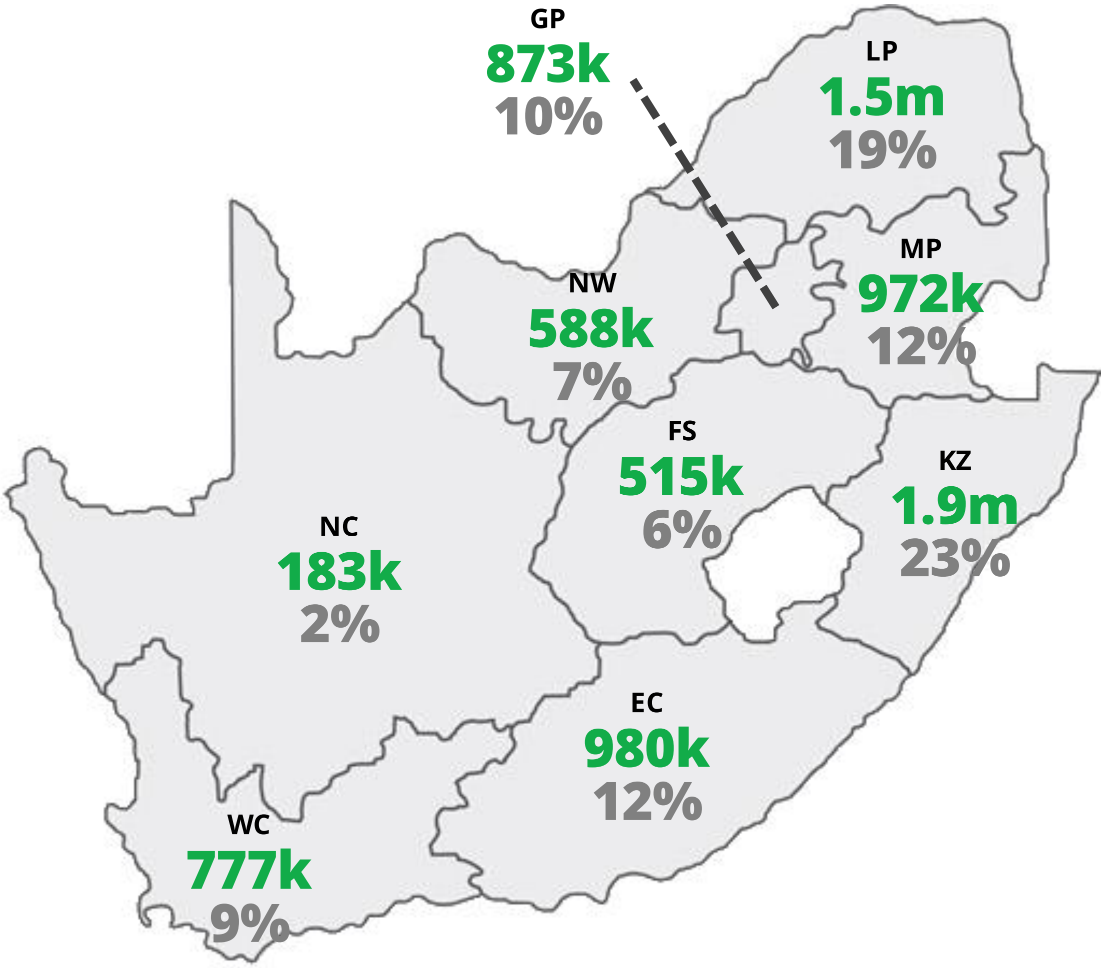
PROVINCES

In Q1 2025, the total number of overnight trips across South Africa's nine provinces was 8.3-million.

KwaZulu-Natal emerged as the leading main destination province, recording the highest number of overnight trips at 1.9-million (23%), followed by Limpopo with 1.5-million (19%) and the Eastern Cape with 980k (12%) trips. The top three provinces visited as main destinations accounted for 54% (4.4-million) of all overnight trips.

The Northern Cape was the least visited province as a main destination, with 183k (2%) overnight trips, followed by the Free State with 515k (6%) and the North West with 588k (7%).

OVERNIGHT TRIPS BY MAIN DESTINATION PROVINCE: Q1 2025



PROVINCES

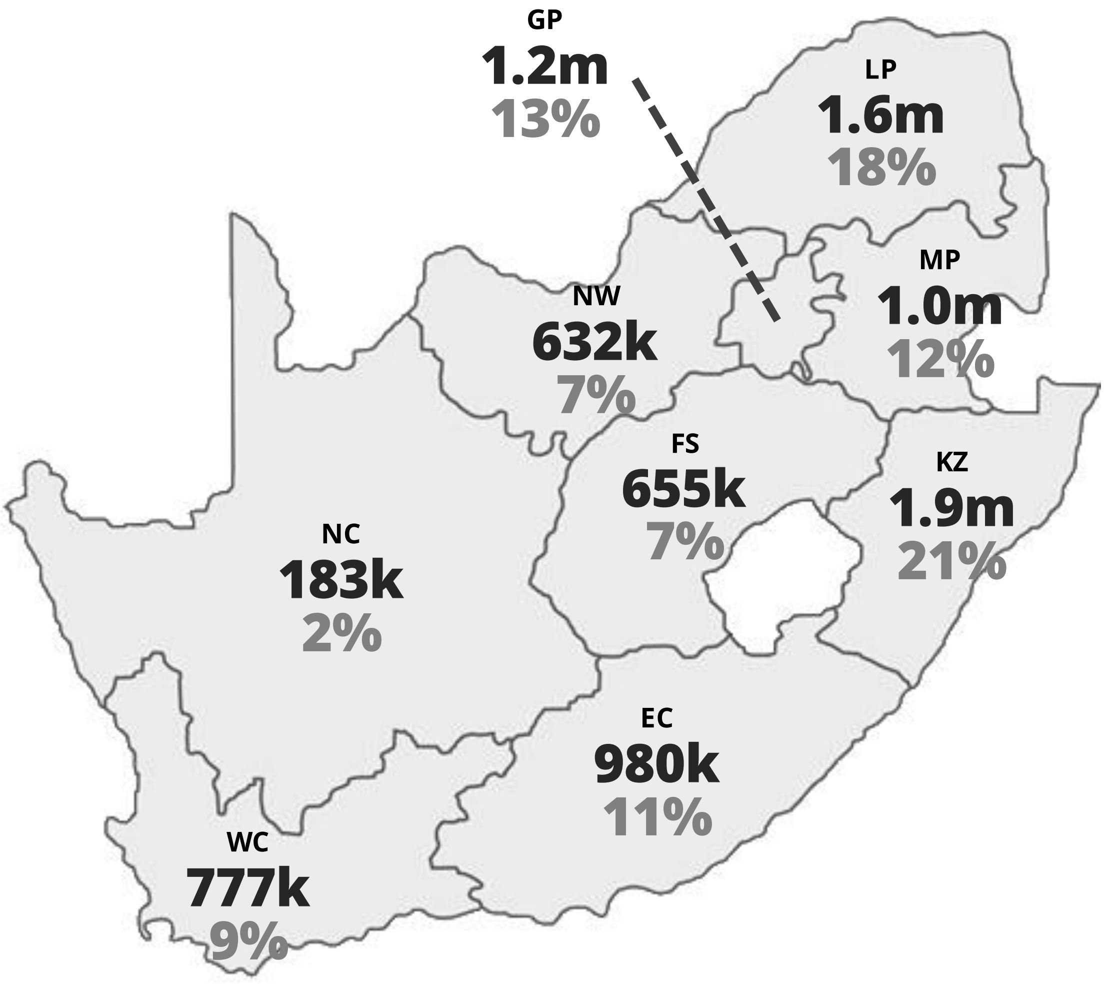
In Q1 2025, a total of 8.3 million overnight trips were recorded where tourists went directly from their province of origin to a single main destination province.

When including provinces visited during stopovers, with some form of economic activity en route to the main destination, the total rises to 8.9 million visits.

Four provinces recorded one million or more visits that included economically active stopovers, overnight stays, and main destination trips: KwaZulu-Natal with 1.9-million (21%), Limpopo with 1.6-million (18%), Gauteng with 1.2-million (13%), and Mpumalanga with 1.0-million (12%). Together, these four provinces accounted for 64% (5.7 million) of all visits.

The Eastern Cape, Northern Cape, and Western Cape recorded no stopover visits in Q1 2025.

PROVINCES VISITED: Q1 2025



PROVINCES

In Q1 2025, the Eastern Cape (82.9%), Western Cape (78.9%), and KwaZulu-Natal (78.1%) recorded the highest proportions of domestic trips taken by their own residents.

These were followed by provinces that also primarily received domestic trips from their own residents, though at slightly lower rates, namely, Limpopo (68.3%) and the Free State (64.3%).

Gauteng, on the other hand, served as a significant source of domestic tourists for several provinces. Notably, it contributed 74.3% of domestic trips to the North West and 45.7% to Mpumalanga. It also played a meaningful role in the domestic tourism figures for the Free State (20.1%) and Limpopo (22.8%).

Gauteng's own domestic tourism was largely driven by travellers from the Eastern Cape, KwaZulu-Natal, Limpopo, and the Western Cape.

The Free State, North West, and Western Cape collectively contributed 62.5% of the Northern Cape's domestic tourism, highlighting the regional nature of travel patterns in South Africa.

INTRA- AND INTER-PROVINCE TRAVEL: Q1 2025

Proportion of Trips to Destination Province

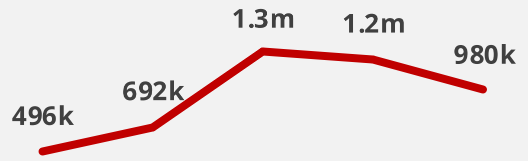
DESTINATION PROVINCE

SOURCE PROVINCE	EC	FS	GT	KZ	LM	MP	NC	NW	WC
EC	82.9%	1.8%	13.3%	0.8%	0.0%	0.0%	0.0%	0.0%	1.7%
FS	1.6%	63.4%	4.0%	3.7%	0.0%	6.5%	24.4%	0.0%	0.0%
GT	2.1%	20.1%	21.9%	12.9%	22.8%	45.7%	7.1%	74.3%	11.6%
KZ	0.0%	5.0%	11.8%	78.1%	1.5%	0.0%	0.0%	0.0%	1.1%
LM	2.6%	0.0%	18.0%	4.5%	68.3%	5.3%	0.0%	0.0%	0.0%
MP	0.0%	0.0%	7.4%	0.0%	0.0%	42.4%	0.0%	0.0%	2.8%
NC	1.4%	1.7%	1.4%	0.0%	4.5%	0.0%	30.4%	0.0%	3.9%
NW	3.3%	8.0%	6.9%	0.0%	2.9%	0.0%	22.4%	25.7%	0.0%
WC	6.2%	0.0%	15.3%	0.0%	0.0%	0.0%	15.7%	0.0%	78.9%

EASTERN CAPE 980k -20.1%

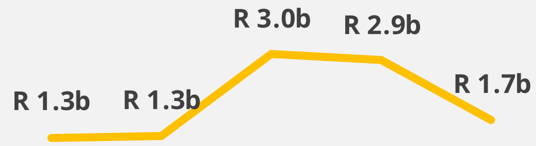
DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS



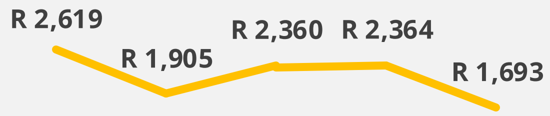
980k
-20.1%

OVERNIGHT SPEND



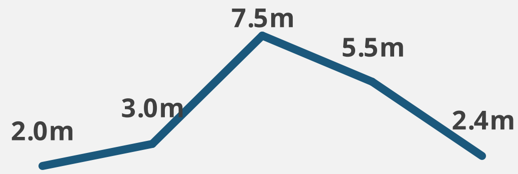
R 1.7b
-42.8%

AVG. OVERNIGHT SPEND



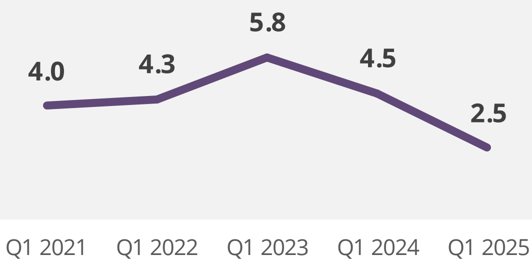
R 1,693
-28.4%

BEDNIGHTS



2.4m
-55.7%

LENGTH OF STAY



2.5
-44.5%

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

980k -20.1%

DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	197k	20.1%	-52.4%
VFR	450k	45.9%	-16.7%
PROFESSIONAL / BUSINESS	35k	3.6%	-69.4%
MICE	7k	0.7%	- %
MEDICAL	152k	15.6%	- %
RELIGIOUS	92k	9.3%	-9.6%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 549.1m	33.1%	-52.5%
VFR	R 622.0m	37.5%	-55.3%
PROFESSIONAL / BUSINESS	R 81.3m	4.9%	-47.2%
MICE	R 8.2m	0.5%	- %
MEDICAL	R 136.9m	8.3%	- %
RELIGIOUS	R 118.2m	7.1%	+133.5%

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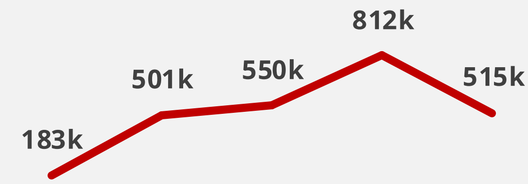
FREE STATE **515k** -36.7%

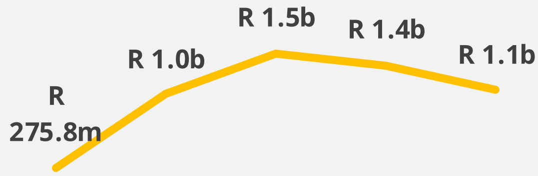
DESTINATION PROVINCE: FREE STATE

OVERNIGHT TRIPS



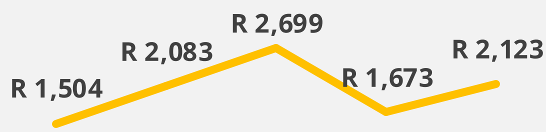
515k
-36.7%

OVERNIGHT SPEND



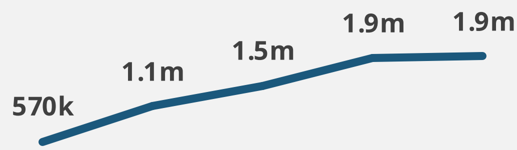
R 1.1b
-19.6%

AVG. OVERNIGHT SPEND



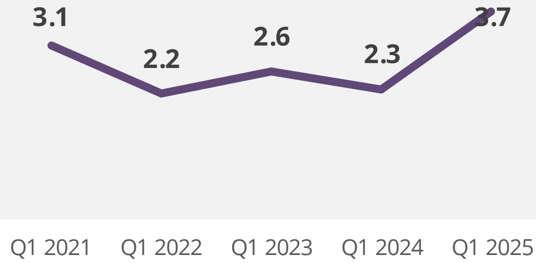
R 2,123
+26.9%

BEDNIGHTS



1.9m
+1.4%

LENGTH OF STAY



3.7
+60.1%

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FREE STATE 515k -36.7%

DESTINATION PROVINCE: FREE STATE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	56k	10.8%	-47.4%
VFR	260k	50.6%	-22.9%
PROFESSIONAL / BUSINESS	26k	5.0%	-70.2%
MICE	121k	23.5%	+2.8%
MEDICAL	-	- %	- %
RELIGIOUS	43k	8.4%	+190.0%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 128.4m	11.4%	-79.2%
VFR	R 484.4m	44.4%	+332.7%
PROFESSIONAL / BUSINESS	R 6.5m	0.6%	-98.4%
MICE	R 397.3m	36.4%	+474.4%
MEDICAL	R -	- %	- %
RELIGIOUS	R 63.6m	5.8%	+1688.2%

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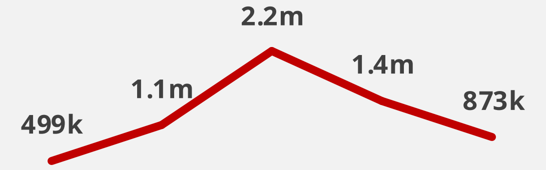
GAUTENG **873k** -39.7%

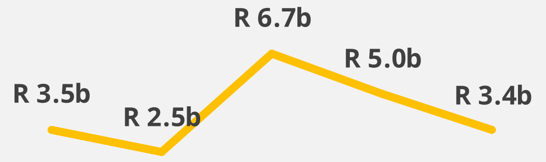
DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS



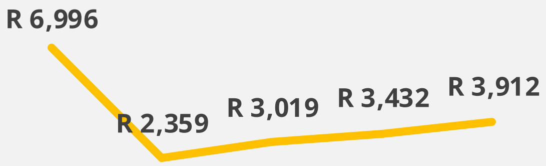
873k
-39.7%

OVERNIGHT SPEND



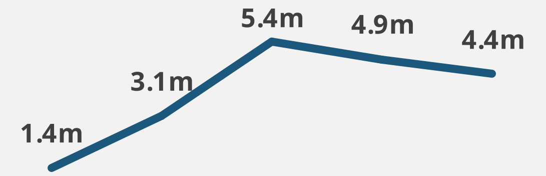
R 3.4b
-31.3%

AVG. OVERNIGHT SPEND



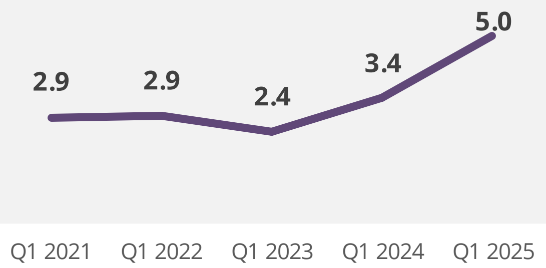
R 3,912
+14.0%

BEDNIGHTS



4.4m
-9.9%

LENGTH OF STAY



5.0
+49.6%

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GAUTENG

873k -39.7%

DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	162k	18.6%	-59.3%
VFR	593k	68.0%	+14.5%
PROFESSIONAL / BUSINESS	36k	4.1%	-81.7%
MICE	31k	3.5%	-83.3%
MEDICAL	-	- %	- %
RELIGIOUS	38k	4.3%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 992.1m	29.1%	-10.2%
VFR	R 1.2b	34.0%	+3.3%
PROFESSIONAL / BUSINESS	R 538.1m	15.8%	-66.1%
MICE	R 314.4m	9.2%	-66.9%
MEDICAL	R -	- %	- %
RELIGIOUS	R 345.5m	10.1%	- %

Key growth and change rates shown in this report are in comparison to 2023.
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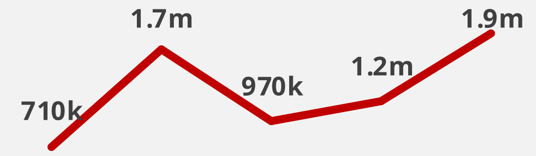
KWAZULU-NATAL **1.9m** +60.9%

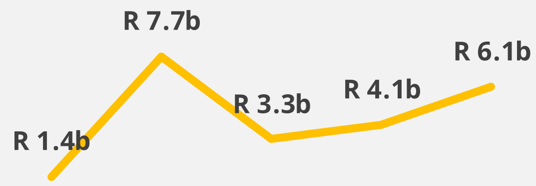
DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS



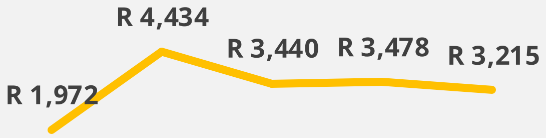
1.9m
+60.9%

OVERNIGHT SPEND



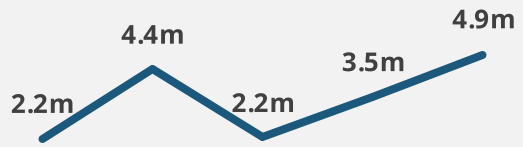
R 6.1b
+48.7%

AVG. OVERNIGHT SPEND



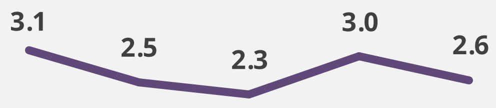
R 3,215
-7.6%

BEDNIGHTS



4.9m
+38.5%

LENGTH OF STAY



2.6
-14.0%

Q1 2021 Q1 2022 Q1 2023 Q1 2024 Q1 2025

Key growth and change rates shown in this report are in comparison to 2023.
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KWAZULU-NATAL 1.9m +60.9%

DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	285k	15.0%	+75.6%
VFR	1.3m	68.9%	+122.8%
PROFESSIONAL / BUSINESS	156k	8.2%	+75.6%
MICE	-	- %	-100.0%
MEDICAL	-	- %	- %
RELIGIOUS	149k	7.9%	-33.9%

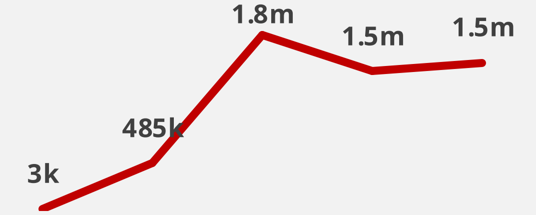
OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 3.9b	63.8%	+189.5%
VFR	R 1.9b	31.5%	+50.0%
PROFESSIONAL / BUSINESS	R 126.4m	2.1%	-74.4%
MICE	R -	- %	-100.0%
MEDICAL	R -	- %	- %
RELIGIOUS	R 157.6m	2.6%	-82.6%

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 **1.5m** **+6.6%**

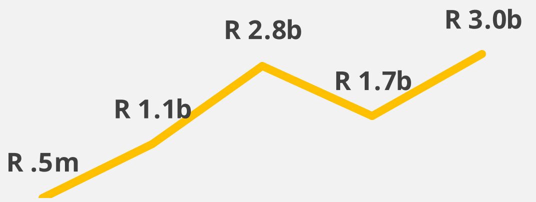
DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS



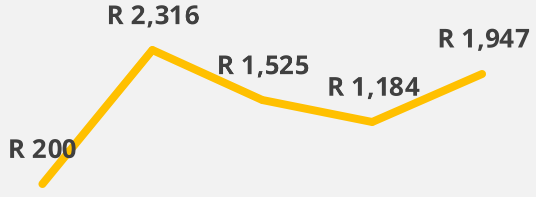
1.5m
+6.6%

OVERNIGHT SPEND



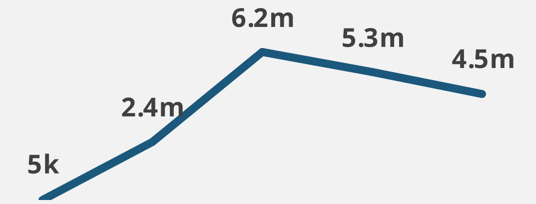
R 3.0b
+75.4%

AVG. OVERNIGHT SPEND



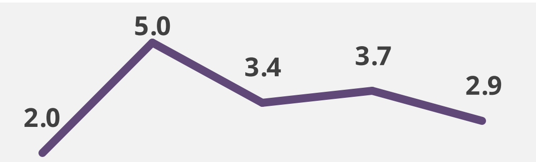
R 1,947
+64.5%

BEDNIGHTS



4.5m
-16.7%

LENGTH OF STAY



2.9
-21.8%

Q1 2021 Q1 2022 Q1 2023 Q1 2024 Q1 2025

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

1.5m +6.6%

DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	200k	12.9%	-4.3%
VFR	1.1m	70.2%	+49.9%
PROFESSIONAL / BUSINESS	187k	12.1%	+1155.3%
MICE	52k	3.3%	-51.9%
MEDICAL	-	- %	-100.0%
RELIGIOUS	23k	1.5%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 544.9m	18.1%	+263.5%
VFR	R 1.7b	55.3%	+189.1%
PROFESSIONAL / BUSINESS	R 541.1m	17.9%	+385.1%
MICE	R 233.1m	7.7%	-24.0%
MEDICAL	R -	- %	-100.0%
RELIGIOUS	R 28.5m	0.9%	- %

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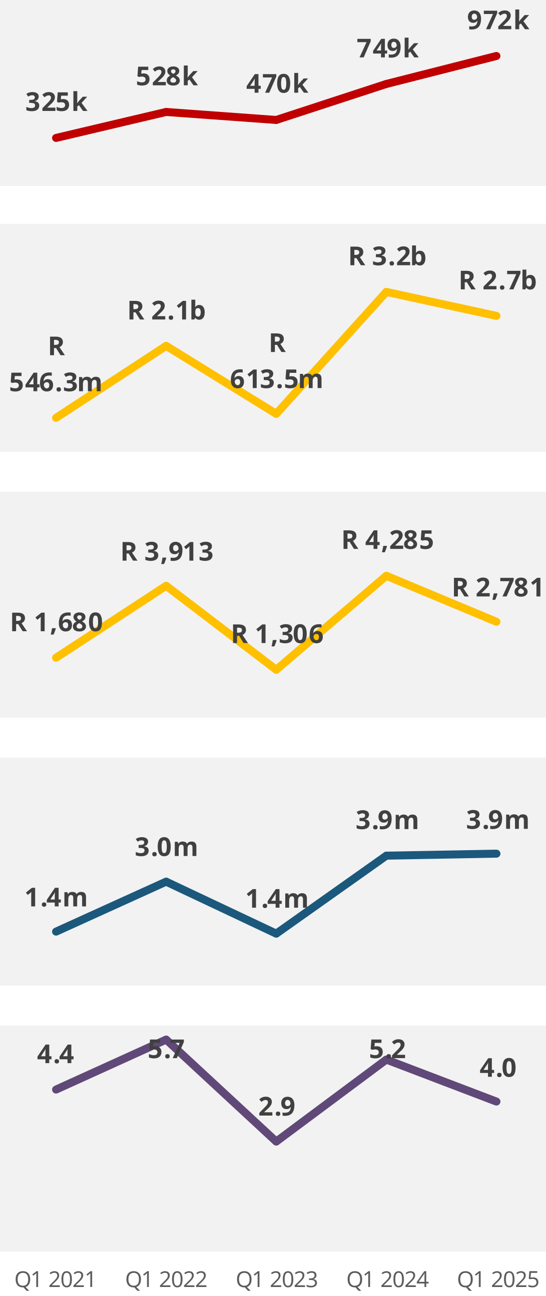
MPUMALANGA 972k +29.7%

DESTINATION PROVINCE: MPUMALANGA



OVERNIGHT TRIPS
972k
+29.7%

OVERNIGHT SPEND
R 2.7b
-15.8%

AVG. OVERNIGHT SPEND
R 2,781
-35.1%

BEDNIGHTS
3.9m
+0.2%

LENGTH OF STAY
4.0
-22.8%

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MPUMALANGA 972k +29.7%

DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	173k	17.8%	-44.5%
VFR	599k	61.7%	+126.4%
PROFESSIONAL / BUSINESS	93k	9.6%	+46.5%
MICE	-	- %	-100.0%
MEDICAL	-	- %	- %
RELIGIOUS	106k	10.9%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.1b	40.1%	+44.7%
VFR	R 1.2b	44.1%	-18.0%
PROFESSIONAL / BUSINESS	R 397.8m	14.7%	-40.0%
MICE	R -	- %	-100.0%
MEDICAL	R -	- %	- %
RELIGIOUS	R 30.8m	1.1%	- %

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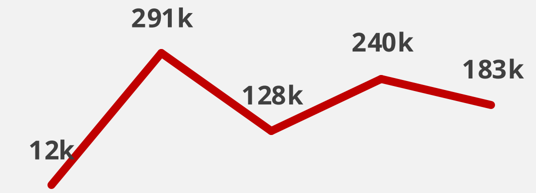
NORTHERN CAPE **183k** **-23.7%**

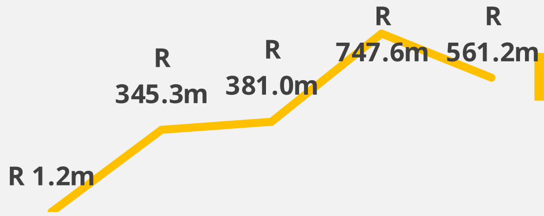
DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS



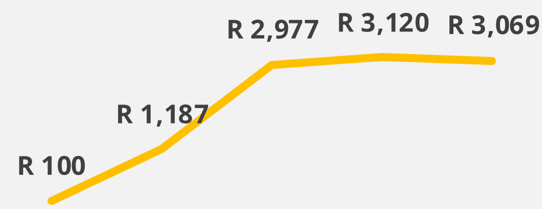
183k
-23.7%

OVERNIGHT SPEND



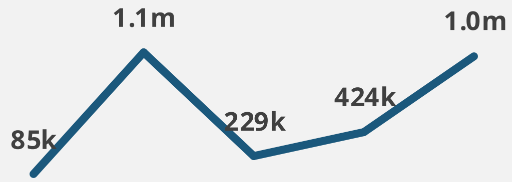
R 561.2m
-24.9%

AVG. OVERNIGHT SPEND



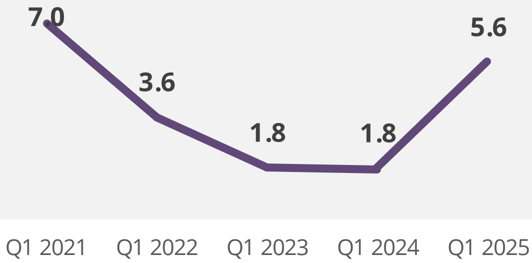
R 3,069
-1.6%

BEDNIGHTS



1.0m
+142.6%

LENGTH OF STAY



5.6
+217.8%

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NORTHERN CAPE 183k -23.7%

DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	-	- %	-100.0%
VFR	97k	52.8%	-20.7%
PROFESSIONAL / BUSINESS	13k	7.1%	-72.6%
MICE	-	- %	-100.0%
MEDICAL	-	- %	-100.0%
RELIGIOUS	29k	15.7%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R -	- %	-100.0%
VFR	R 168.0	29.9%	-44.3%
PROFESSIONAL / BUSINESS	R 76.8m	13.7%	-67.2%
MICE	R -	- %	-100.0%
MEDICAL	R -	- %	- %
RELIGIOUS	R 111.3m	19.8%	- %

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NORTH WEST 588k -29.9%

DESTINATION PROVINCE: NORTH WEST

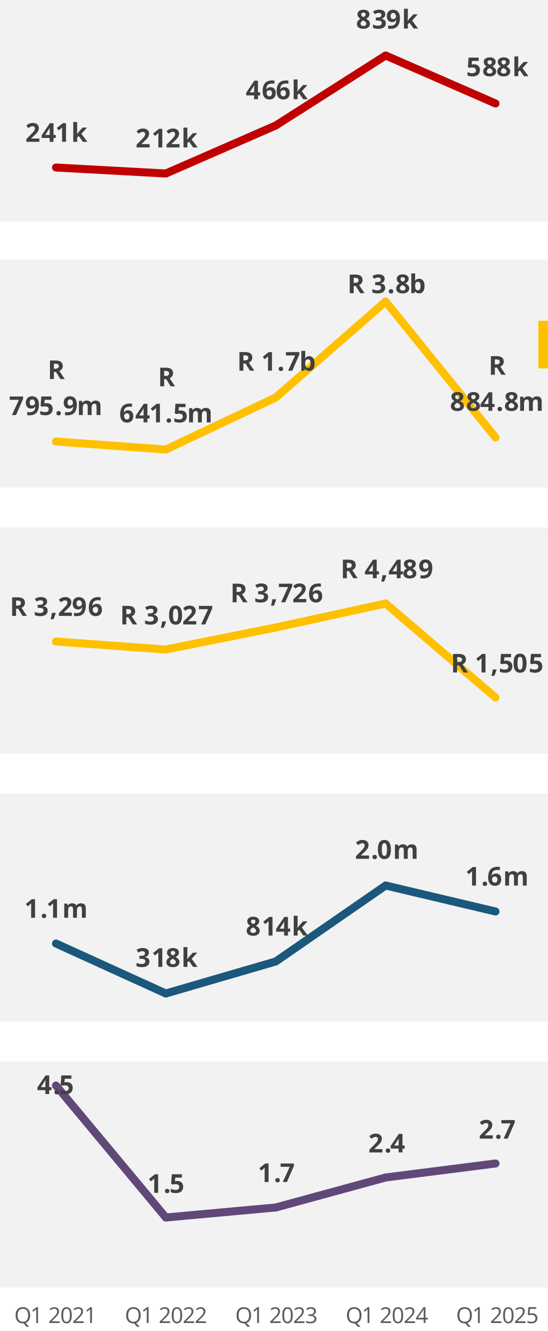
OVERNIGHT TRIPS
588k
-29.9%

OVERNIGHT SPEND
R 884.8m
-76.5%

AVG. OVERNIGHT SPEND
R 1,505
-66.5%

BEDNIGHTS
1.6m
-20.8%

LENGTH OF STAY
2.7
+13.0%



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NORTH WEST 588k -29.9%

DESTINATION PROVINCE: NORTH WEST

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	84k	14.2%	-75.5%
VFR	248k	42.2%	-14.0%
PROFESSIONAL / BUSINESS	124k	21.1%	+725.9%
MICE	69k	11.8%	-9.6%
MEDICAL	-	- %	- %
RELIGIOUS	63k	10.7%	+53.3%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 115.2m	13.0%	-94.5%
VFR	R 527.1m	59.6%	-43.1%
PROFESSIONAL / BUSINESS	R 66.1m	7.5%	- %
MICE	R 139.8m	15.8%	-30.2%
MEDICAL	R -	- %	- %
RELIGIOUS	R 36.5m	4.1%	-77.8%

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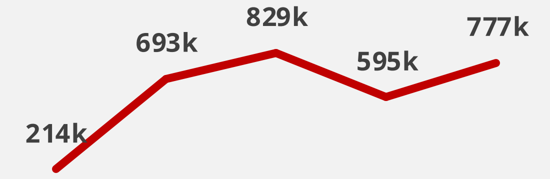
WESTERN CAPE — 777k +30.6%

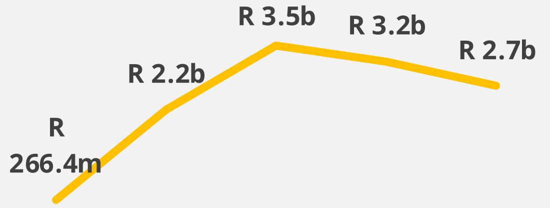
DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS



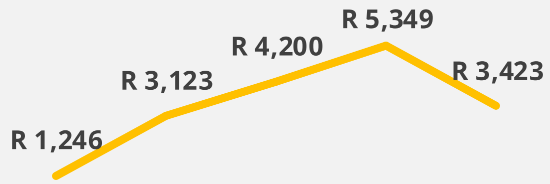
777k
+30.6%

OVERNIGHT SPEND



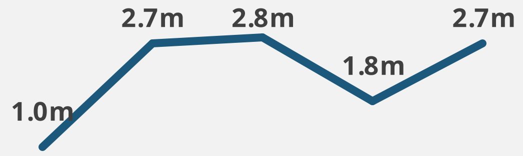
R 2.7b
-16.4%

AVG. OVERNIGHT SPEND



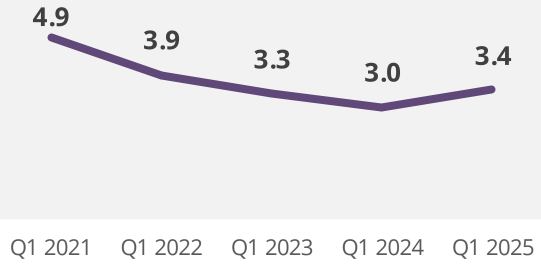
R 3,423
-36.0%

BEDNIGHTS



2.7m
+50.5%

LENGTH OF STAY



3.4
+15.3%

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WESTERN CAPE 777k +30.6%

DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	360k	46.3%	+71.3%
VFR	291k	37.5%	+75.0%
PROFESSIONAL / BUSINESS	59k	7.6%	+77.5%
MICE	14k	1.8%	+23.8%
MEDICAL	-	- %	-100.0%
RELIGIOUS	52k	6.7%	+95.1%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.3b	49.7%	-22.9%
VFR	R 588.3m	22.1%	-2.0%
PROFESSIONAL / BUSINESS	R 632.3m	23.8%	+376.2%
MICE	R 18.4m	0.7%	- %
MEDICAL	R -	- %	-100.0%
RELIGIOUS	R 98.2m	3.7%	+139.1%

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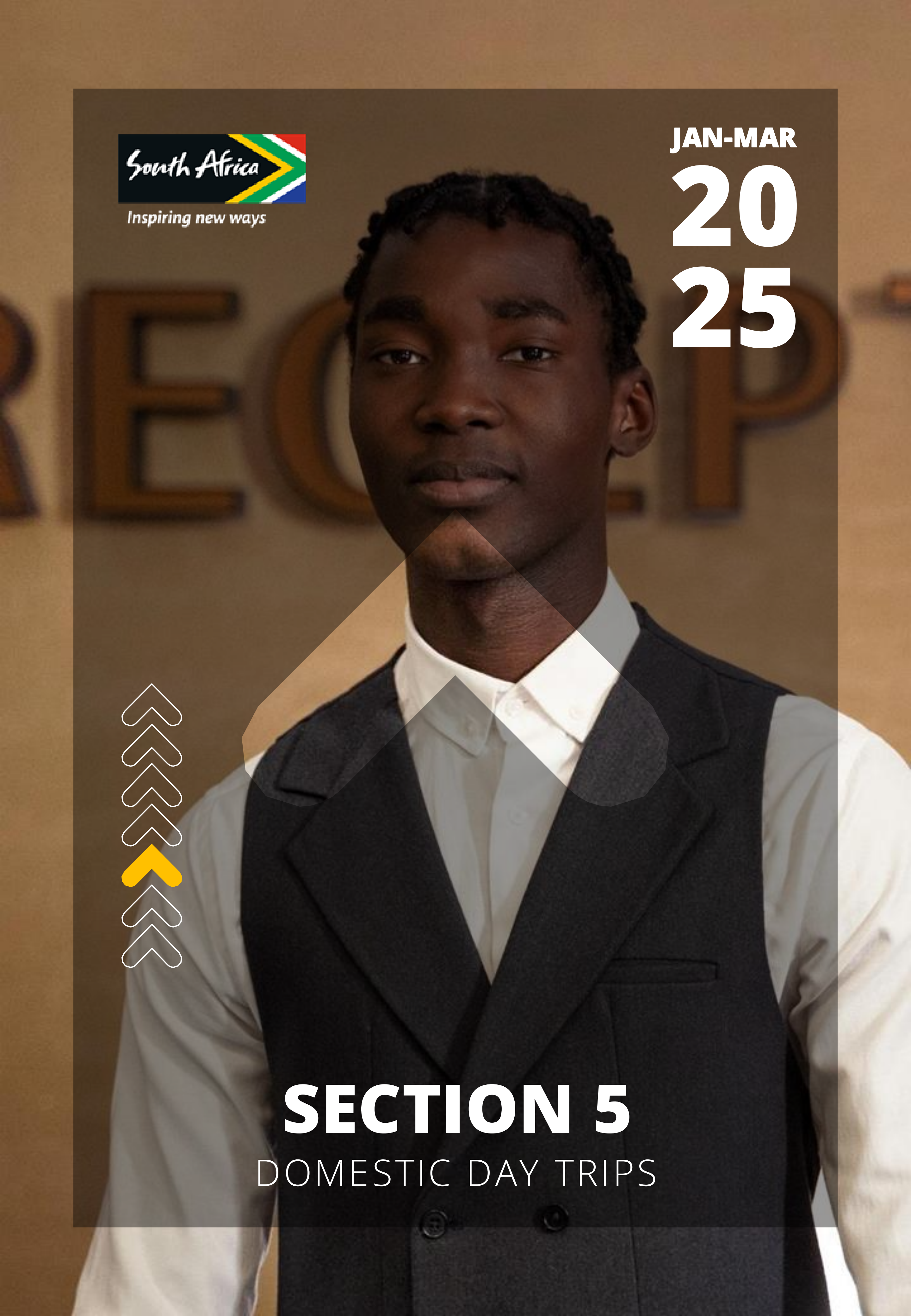

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2025

SECTION 5

DOMESTIC DAY TRIPS

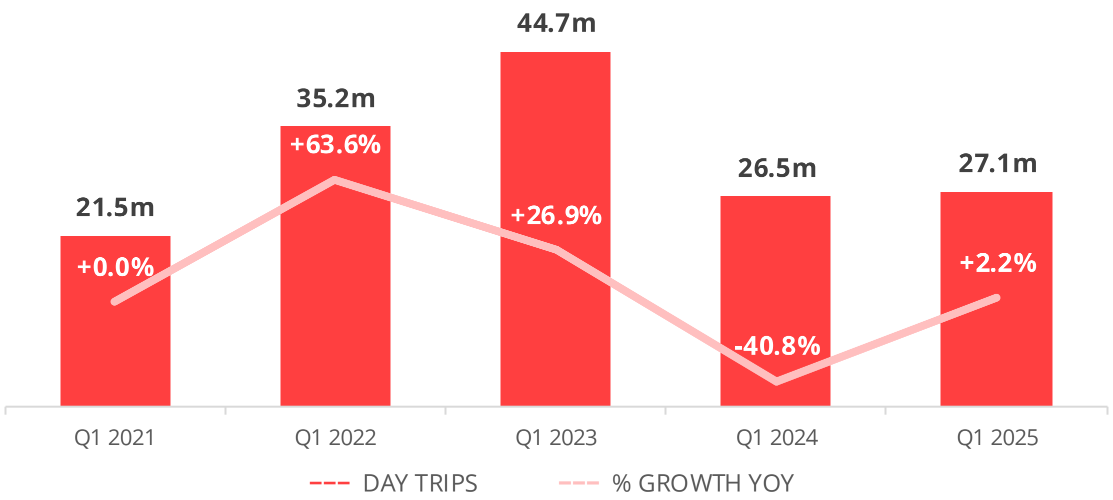
DAY TRIPS 27.1m +2.2%

In Q1 2025, domestic day trips saw moderate growth of 2.2%, reaching 27.1 million—almost identical to the number of trips recorded in Q1 2024, and still well below the figure of 44.7 million reached in Q1 2023.

VFR (31% share of total), personal shopping, and holidays were the main purposes for day trips. VFR saw growth of 16.4%, reaching 8.4 million day trips in Q1 2025, while holidays remained steady at 5.6 million day trips. Personal shopping rose strongly by 39.8%, reaching 6.0 million day trips.

Professional and business-related travel experienced a significant drop, decreasing by -31.8% to 2.3 million day trips.

DAY TRIPS: Q1 2021 – Q1 2025



DAY TRIPS BY PURPOSE: **Q1 2024 v Q1 2025**

	Q1 2024	Q1 2025	
VFR	7.2m 27.2%	8.4m 31.0%	+16.4%
PERSONAL SHOPPING	4.3 16.3%	6.0m 22.3%	+39.8%
HOLIDAY	5.4m 20.3%	5.6m 20.5%	+3.7%
PROFESSIONAL / BUSINESS	3.3m 12.6%	2.3m 8.4%	-31.8%

DAY TRIPS 27.1m +2.2%

In Q1 2025, a more positive picture is emerging compared to Q1 2024. In Q1 2024, the majority of provinces experienced declines in their growth rates as source provinces for domestic day trips.

In the current quarter, only the North West, the Eastern Cape, and KwaZulu-Natal recorded negative growth rates, while all other provinces showed increases.

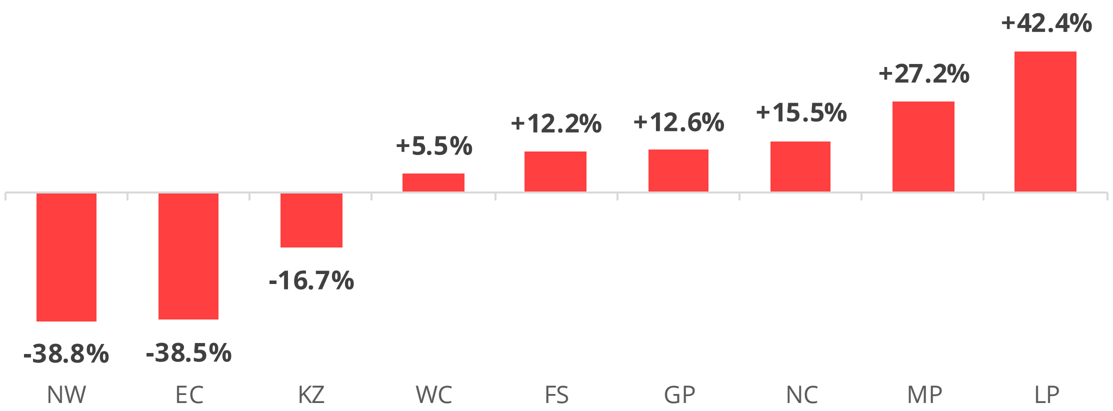
Limpopo recorded the highest growth rate at 42.9%, growing to 5.4 million day trips, followed by Mpumalanga at 27.2% (3.3 million day trips).

The highest number of day trips as source provinces were recorded by Limpopo (5.4 million), Gauteng (5.2 million), and KwaZulu-Natal (4.5 million).

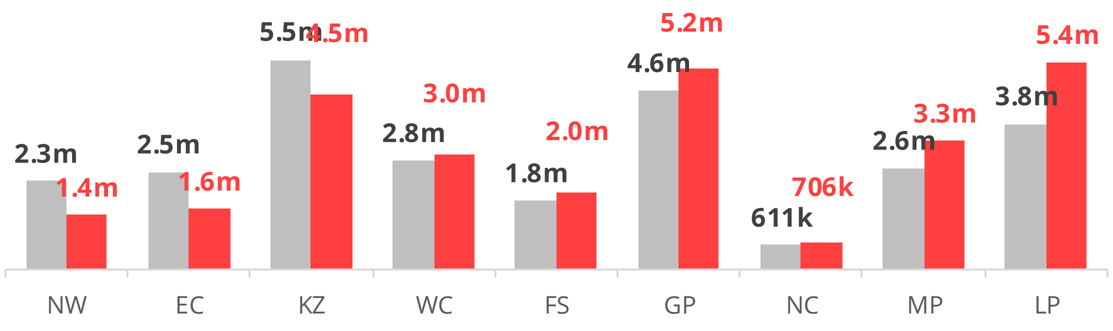
The Western Cape, as a source province, saw a moderate increase of 5.5%, recovering from its 34.8% decline in Q1 2024, to reach 3.0 million day trips in Q1 2025.

The North West and the Eastern Cape experienced the largest drops, at -38.8% and -38.5%, respectively. Despite a decline of 16.7%, KwaZulu-Natal still held a commanding position with 4.5 million day trips.

SOURCE PROVINCE GROWTH RATE: Q1 2024 v Q1 2025



DAY TRIPS FROM SOURCE PROVINCE: Q1 2024 v Q1 2025



DAY TRIPS 27.1m +2.2%

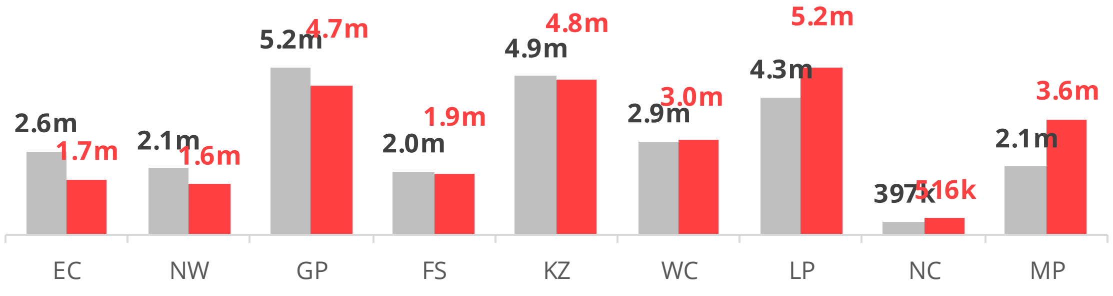
The Eastern Cape, North West, Gauteng, the Free State, and KwaZulu-Natal all experienced declines as destination provinces for day trips in Q1 2025.

Despite these declines, KwaZulu-Natal and Gauteng recorded the second and third highest number of day trips—4.8 million and 4.7 million, respectively. The top position was held by Limpopo, which experienced a rise of 22.2%, reaching 5.2 million day trips in Q1 2025.

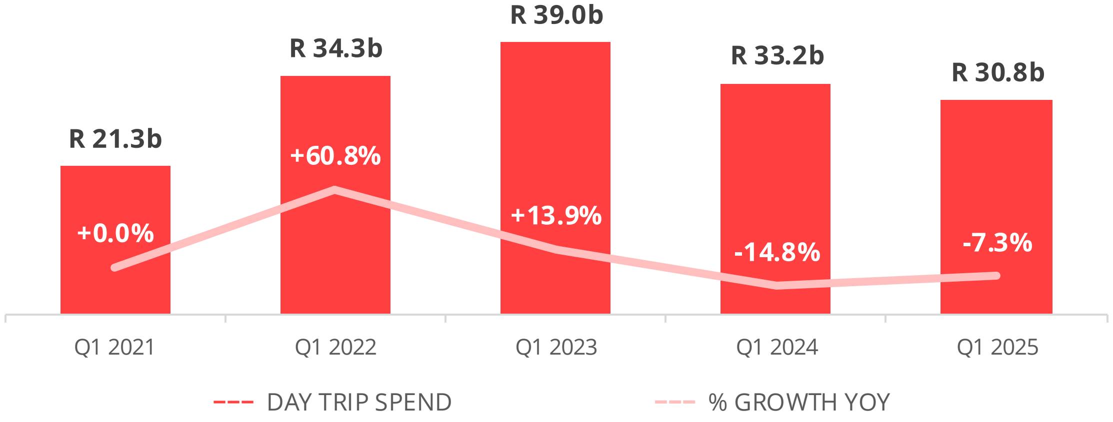
Mpumalanga, the Western Cape, and the Northern Cape also saw increases in day trips during this quarter. Mpumalanga recorded a substantial increase of 70.3%, reaching 3.6 million day trips. The Western Cape and the Northern Cape saw marginal increases, with the Northern Cape, at 516k trips, remaining the least frequented destination for day trips.

Domestic day trip spending declined by 7.3%, dropping from R33.2 billion in Q1 2024 to R30.8 billion in Q1 2025.

DAY TRIPS TO DESTINATION PROVINCE: Q1 2024 v Q1 2025



DAY TRIP SPEND: Q1 2021 – Q1 2025



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SECTION 6
THE ECONOMIC CONTEXT

THE ECONOMIC CONTEXT +0.6* ▲

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

The South African gross domestic product (GDP) expanded by 0.6% in the fourth quarter (October–December 2024).[1]

This growth was primarily driven by strong performance in the agriculture, forestry and fishing sector, which expanded by 17.2% and contributed 0.4 percentage points to overall GDP growth.[1]

The finance, real estate and business services sector also performed well, growing by 1.1% and contributing 0.3 percentage points, while the trade, catering and accommodation sector increased by 1.4%, adding 0.2 percentage points.[1]

The transport, storage and communication industry contracted by 1.0%, and the manufacturing sector declined by 0.6%, with significant weakness in metal products and motor vehicle manufacturing. Additionally, electricity, gas and water fell by 1.4%, and general government services decreased by 0.5%, largely due to reduced employment levels in the public sector.[1]

On the expenditure side, real GDP also increased by 0.6% in Q4 2024. Household final consumption expenditure rose by 1.0%, contributing 0.6 percentage points to the growth. This was supported by increased spending on clothing and footwear, food and beverages, recreation, household furnishings, and health. In contrast, government consumption expenditure declined by 0.8%, subtracting 0.2 percentage points from growth, largely due to cuts in goods, services, and employee compensation.[1]

UNEMPLOYMENT RATE

South Africa's unemployment rate rose to 32.9% in the first quarter of 2025.

The number of unemployed individuals increased by 237 thousand to 8.2 million, while the number of employed individuals declined by 291 thousand to 16.8 million.[2]

PRIME INTEREST RATE

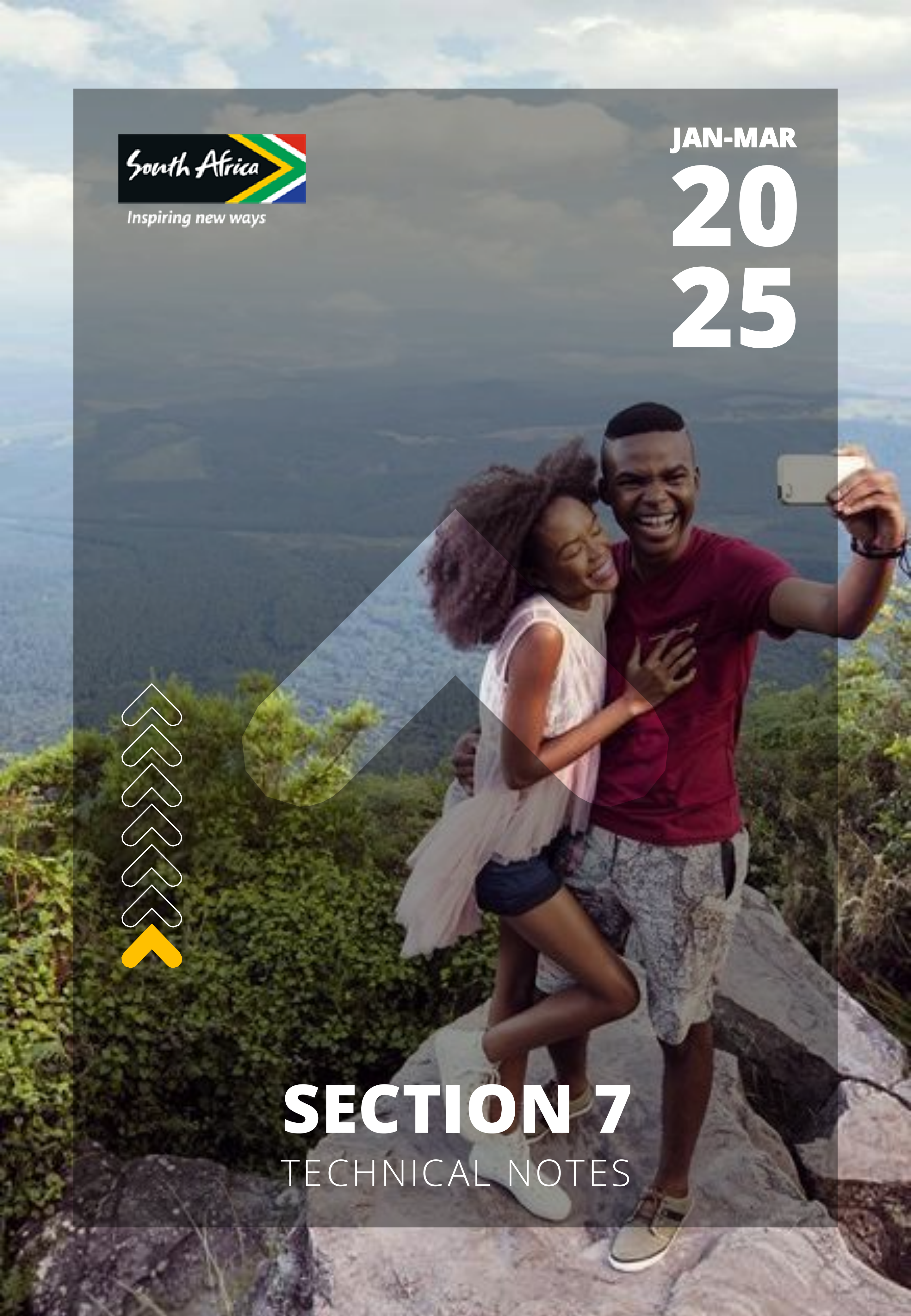
The South African Reserve Bank reduced its key interest rate by 25 basis points to 7.50% on 31 January 2025.[3]

* Over Q4 2024.

[1] Statistical Release P0441: Gross Domestic Product – Fourth quarter 2024. 04 March 2025. Statistics South Africa.

[2] Statistical Release P0211 : Quarterly Labour Force Survey (QLFS) – Q1: 2025. 13 May 2025. Statistics South Africa.

[2] https://www.resbank.co.za/en/home/what-we-do/statistics/key-statistics/current-market-rates



SECTION 7

TECHNICAL NOTES

TECHNICAL NOTES

Response rates at a provincial level against the quarterly quotas which were all achieved for Q1 2025.

PROVINCE	QUARTERLY QUOTA	QUARTERLY ACHIEVED SAMPLE	COMPLETION RESPONSE RATE
Eastern Cape (EC)	476	476	100%
Free State (FS)	288	288	100%
Gauteng (GT)	1012	1012	100%
KwaZulu-Natal (KZ)	692	692	100%
Limpopo (LM)	172	172	100%
Mpumalanga (MP)	212	212	100%
North West (NW)	136	116	100%
Northern Cape (NC)	172	192	100%
Western Cape (WC)	740	740	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 2021 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 were 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. 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 implementation on 8-inch computer tablets.

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 interview once it synchronizes with the EA GIS coordinates, ensuring location accuracy.

The survey is available in all eleven official languages of South Africa. Translations are overlaid on the tablet so that the respondent can select the language they wish 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 multi-stage probability sampling method was designed.

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 nEA is the allocated number of EAs in the stratum, PSUHH is the number of households in the selected EA, and POPHH is the number of households in the selected stratum.

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 nHH is the number of selected households per PSU, and PSUHH is the number of households in the selected PSU.

Continued...

WEIGHTING

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		
		Q1 2023	Q1 2024	Q1 2025
Travel Month	January	33.3%	32.5%	24.1%
	February	31.7%	32.9%	35.1%
	March	35.0%	34.6%	40.9%

SHARE OF OVERNIGHT TRIPS, BY MONTH

		Overnight Trips		
		Q1 2023	Q1 2024	Q1 2025
Travel Month	January	31.9%	32.6%	25.3%
	February	32.2%	31.9%	34.4%
	March	35.9%	35.5%	40.3%

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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

		Q1 2023			Q1 2024			Q1 2025		
		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	1.6%	0.0%	0.0%	0.0%	8.7%	0.0%	0.5%	0.0%	0.0%
	Some primary school	0.6%	0.0%	0.0%	4.8%	0.0%	0.0%	1.1%	0.5%	0.0%
	Primary school completed	6.4%	0.0%	0.0%	5.1%	0.5%	0.0%	0.0%	0.0%	0.0%
	Some high school	35.3%	11.9%	0.0%	41.7%	12.1%	0.0%	33.7%	11.5%	29.4%
	High school completed	35.9%	38.1%	41.8%	30.9%	31.5%	31.8%	31.4%	40.8%	29.5%
	Some college	6.6%	0.9%	13.5%	2.7%	5.2%	14.4%	8.6%	1.5%	0.0%
	College completed	4.1%	15.8%	17.3%	5.7%	16.1%	13.4%	6.7%	16.7%	20.2%
	Some university	0.8%	5.1%	0.0%	0.6%	3.7%	17.5%	2.6%	2.9%	0.0%
	Technikon diploma / degree	2.5%	2.9%	0.0%	3.8%	6.6%	1.5%	6.2%	1.8%	0.0%
	University degree / diploma	3.5%	11.7%	4.7%	3.2%	12.6%	6.8%	7.8%	22.1%	11.8%
	Post-graduate degree	2.7%	13.6%	22.8%	1.5%	2.9%	14.6%	1.5%	2.1%	9.1%
	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	63.9%	49.7%	63.9%	54.2%	40.9%	90.9%	57.2%	59.0%	83.3%
	Female	36.1%	50.3%	36.1%	45.8%	59.1%	9.1%	42.8%	41.0%	16.7%
Marital Status	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Single / Never married	46.9%	52.9%	41.1%	56.2%	68.2%	9.1%	65.6%	52.6%	36.6%
	Married / Living together	45.7%	34.8%	58.9%	29.0%	18.1%	72.1%	26.3%	36.2%	39.0%
	Divorced / Widowed / Separated	7.4%	12.3%	0.0%	14.8%	13.7%	18.8%	8.1%	11.2%	24.4%
	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	21.7%	12.3%	26.9%	28.3%	34.4%	3.7%	22.7%	24.9%	25.9%
	Children, dependent	59.0%	75.5%	50.7%	60.4%	47.2%	75.6%	63.6%	61.2%	43.3%
	Children, independent	18.2%	10.9%	22.3%	3.2%	15.1%	20.7%	6.9%	12.4%	20.2%
	Children, dependent + independen	1.2%	1.3%	0.0%	8.0%	3.3%	0.0%	6.8%	1.4%	10.5%
	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	23.6%	4.7%	10.5%	6.4%	4.7%	0.0%	3.2%	7.5%	0.0%
	R501 - R750	4.7%	0.0%	0.0%	0.8%	2.5%	0.0%	0.0%	0.0%	0.0%
	R751 - R1,000	4.3%	4.3%	0.0%	5.2%	8.2%	0.0%	3.0%	0.3%	0.0%
	R1,001 - R1,500	6.1%	2.8%	0.0%	6.3%	5.6%	0.0%	8.9%	0.0%	0.0%
	R1,501 - R2,000	4.3%	6.7%	0.0%	15.7%	1.3%	0.0%	9.3%	0.0%	0.0%
	R2,001 - R3,000	12.1%	3.6%	10.2%	19.6%	14.8%	18.8%	10.0%	2.3%	16.6%
	R3,001 - R5,000	13.8%	6.8%	10.3%	11.4%	9.8%	4.5%	6.5%	13.8%	17.6%
	R5,001 - R7,500	2.9%	2.8%	0.0%	8.5%	4.2%	4.0%	7.9%	10.7%	0.0%
	R7,501 - R10,000	4.4%	15.2%	3.1%	10.7%	14.0%	0.0%	9.2%	7.7%	0.0%
	R10,001 - R15,000	6.8%	6.8%	8.3%	2.5%	3.5%	9.2%	9.0%	5.0%	0.0%
	R15,001 - R20,000	2.7%	4.5%	22.3%	5.1%	5.3%	2.3%	7.4%	7.0%	29.3%
	R20,001 - R30,000	4.3%	12.0%	0.0%	1.7%	9.3%	16.2%	6.6%	3.8%	10.5%
	R30,001+	1.8%	15.2%	22.4%	1.3%	8.9%	43.1%	2.3%	5.6%	18.8%
	Refused to answer	4.4%	6.7%	12.8%	2.5%	3.1%	0.0%	9.2%	32.1%	7.2%
	Don't Know / Uncertain	0.9%	6.7%	0.0%	0.2%	2.4%	1.9%	3.1%	2.9%	0.0%
	No income	2.9%	1.4%	0.0%	2.3%	2.5%	0.0%	4.4%	1.3%	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	13.8%	13.2%	21.6%	13.9%	13.1%	0.0%	15.8%	17.0%	0.0%
	25 - 34	23.4%	26.8%	3.1%	21.6%	37.2%	18.7%	27.7%	26.2%	36.8%
	35 - 44	23.2%	30.9%	19.5%	28.3%	21.7%	37.8%	26.7%	20.8%	36.1%
	45 - 54	19.2%	19.6%	36.6%	9.2%	15.4%	22.8%	8.7%	14.1%	27.2%
	55+	20.4%	9.6%	19.2%	27.0%	12.5%	20.7%	21.0%	21.9%	0.0%

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APPENDIX C

OVERNIGHT TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY OVERNIGHT TRIPS

		Overnight Trips		
		Q1 2023	Q1 2024	Q1 2025
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	1.0%	2.2%	1.5%
	Some primary school	3.1%	5.5%	1.7%
	Primary school completed	4.0%	3.8%	0.0%
	Some high school	23.7%	24.8%	28.3%
	High school completed	34.7%	34.8%	33.1%
	Some college	4.0%	3.8%	6.0%
	College completed	9.5%	7.6%	8.7%
	Some university	1.9%	3.3%	3.6%
	Technikon diploma / degree	2.8%	4.7%	5.5%
	University degree / diploma	8.8%	6.3%	9.6%
	Post-graduate degree	6.6%	3.2%	2.0%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	63.2%	52.9%	57.7%
	Female	36.8%	47.1%	42.3%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	49.9%	57.2%	62.2%
	Married / Living together	42.0%	30.2%	27.2%
	Divorced / Widowed / Separated	8.1%	12.6%	10.6%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	21.9%	29.1%	25.7%
	Children, dependent	59.0%	55.3%	61.4%
	Children, independent	17.2%	11.0%	8.0%
	Children, dependent + independen	1.9%	4.6%	4.8%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	15.0%	4.9%	5.0%
	R501 - R750	2.4%	1.5%	0.0%
	R751 - R1,000	3.6%	5.3%	2.2%
	R1,001 - R1,500	4.4%	7.3%	6.3%
	R1,501 - R2,000	4.5%	8.2%	9.5%
	R2,001 - R3,000	9.3%	18.4%	8.9%
	R3,001 - R5,000	10.8%	10.5%	8.9%
	R5,001 - R7,500	5.4%	7.6%	8.8%
	R7,501 - R10,000	7.5%	8.4%	7.2%
	R10,001 - R15,000	7.3%	3.9%	6.6%
	R15,001 - R20,000	4.2%	4.6%	7.8%
	R20,001 - R30,000	6.4%	5.2%	5.8%
	R30,001+	7.4%	7.4%	4.2%
	Refused to answer	5.1%	4.3%	12.6%
	Don't Know / Uncertain	3.3%	0.8%	2.3%
	No income	3.3%	1.8%	3.7%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	15.2%	12.7%	13.8%
	25 - 34	23.0%	25.6%	28.1%
	35 - 44	25.4%	24.2%	24.7%
	45 - 54	20.5%	17.6%	13.3%
	55+	16.0%	19.9%	20.1%

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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 of Transport Type		
		Q1 2023	Q1 2024	Q1 2025
Main Transport to Destination	Minibus taxi	40.7%	35.5%	39.5%
	My car / van / bakkie	29.0%	31.2%	33.7%
	Another car / van / bakkie	16.2%	20.9%	20.1%
	Tour bus	1.2%	2.2%	2.9%
	Aeroplane	3.8%	1.9%	2.9%
	Commercial bus	6.5%	5.3%	1.1%
	Rental car	1.0%	1.3%	0.6%
	App-based taxi (Uber, Bolt, etc.)	1.3%	1.0%	0.6%
	Truck / lorry	0.4%	0.3%	0.3%

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APPENDIX F

SHARE OF BEDNIGHTS BY ACCOMMODATION TYPE

SHARE OF TOTAL BEDNIGHTS, BY ACCOMMODATION TYPE

		Share of Total Bednights		
		Q1 2023	Q1 2024	Q1 2025
Accommodation Type	Friends / Relatives	70.3%	65.5%	71.4%
	Guest House	4.2%	7.6%	7.4%
	Hotel	8.0%	7.6%	6.6%
	Self-Catering	4.8%	2.1%	4.4%
	B&B	2.1%	1.0%	3.5%
	Lodge	1.5%	6.7%	3.2%
	Camping	0.8%	1.4%	1.5%
	Halls	0.1%	0.2%	1.5%
	Other Accommodation	4.7%	5.9%	0.4%
	AirBnB	1.4%	1.0%	0.1%
	Hostel	0.4%	0.1%	0.1%
	Holiday Home	1.6%	0.9%	0.0%
	Hospital	0.0%	0.1%	0.0%

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