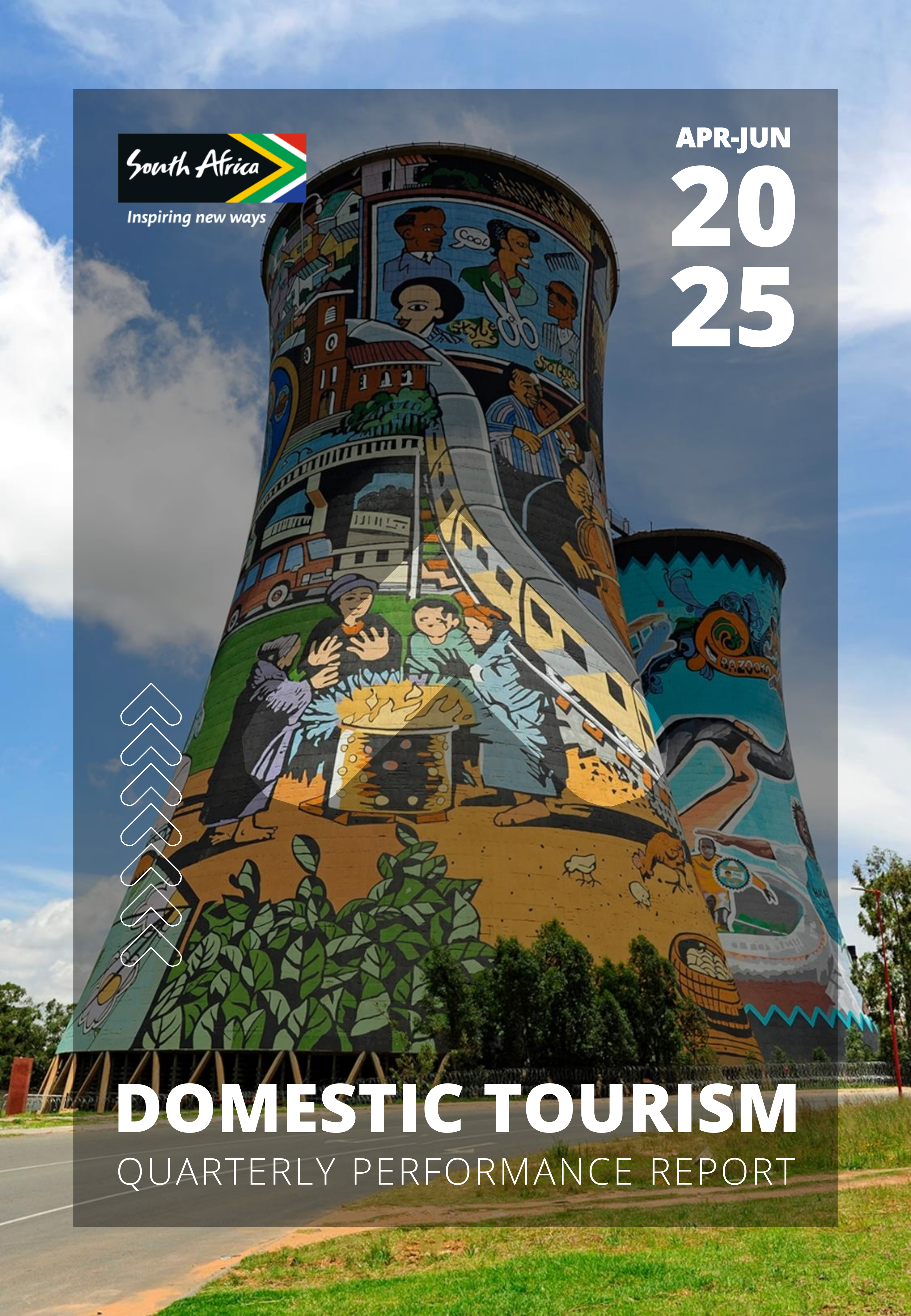

South Africa
Inspiring new ways

APR-JUN

2025

DOMESTIC TOURISM

QUARTERLY PERFORMANCE REPORT

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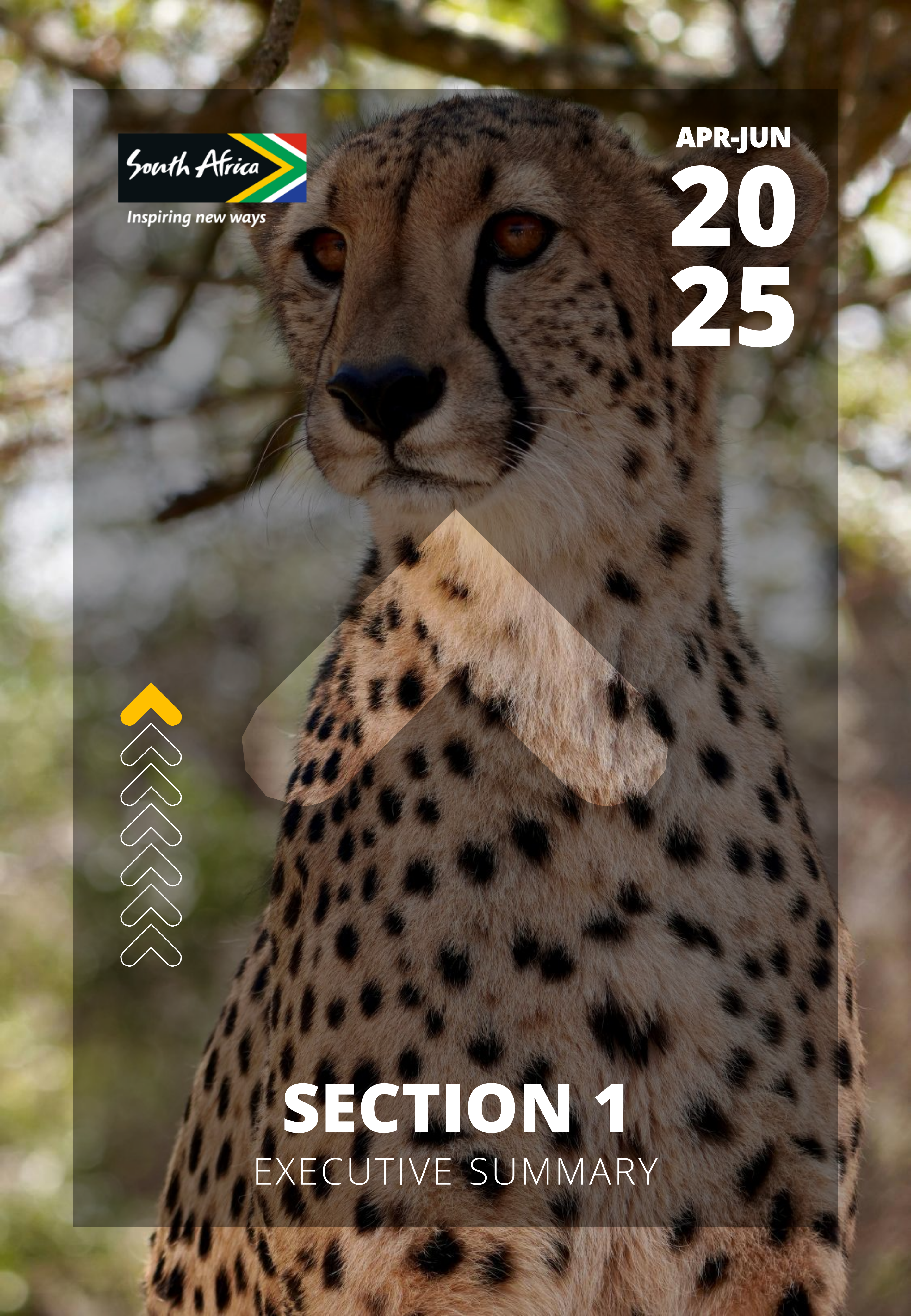


South Africa
Inspiring new ways

APR-JUN
2025

SECTION 1
EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

CONTEXT

The second quarter of 2025 presents a paradox for South Africa's domestic tourism sector. While overnight trips grew to a high of 12.1-million, overall spend contracted.

This divergence signals a shift in travel behaviour, driven by persistent economic pressures on households. South Africans are travelling more frequently but for shorter durations, and on tighter budgets, primarily for Visiting Friends and Relatives (VFR). This trend has resulted in fewer discretionary holiday trips and created a new landscape of provincial winners and losers. The data reflects not just volume growth, but the resilience of a budget-conscious traveller adapting to constrained conditions.

Two key calendar effects shaped Q2 2025. The Easter holiday boosted religious and VFR-related travel. Meanwhile, the Term 2 school holidays, which partly fell in late June in 2024, shifted almost entirely into Q3 2025 (28 June–21 July). This reduced Q2 leisure travel, with stronger volumes expected in July (Q3 2025).

DOMESTIC OVERNIGHT TRAVEL PATTERNS

Domestic overnight travel rebounded strongly in Q2 2025, reversing the downturn of a year earlier. Overnight trips rose +30.7% to 12.1-million, up from 9.2-million in Q2 2024 and surpassing the previous high of 10.0-million trips in Q2 2023. This growth was driven by an increase in the number of domestic tourists. The number of domestic tourists grew +30.9% to a record 11.5-million, up from 8.8-million in Q2 2024. Trips per tourist remained stable at one per person.

VFR was the leading purpose for the fourth consecutive year. Its share increased from 40.7% to 55.0%. Holiday travel declined from 33.9% to 19.1%, while religious trips grew from 5.5% to 15.2%. The MICE sector continued to struggle, with its share of trips falling from 4.1% to just 1.6%.

During the quarter, 6.6-million trips were made for VFR purposes compared with 3.8-million in Q2 2024. VFR spend increased to R 11.6-billion, while bednights grew by +35.2% to 22.4-million. Holiday travel underperformed: trips decreased by -26.2% to 2.3-million, and bednights fell from 12.1-million to 8.4-million.

Religious tourism was a standout growth area. Total spend rose more than fourfold, from R 599.3-million to R 2.5-billion, boosted by the return of the Zion Christian Church (ZCC) Easter pilgrimage to Moria on 18 April 2025, which generated large-scale travel activity.

Domestic overnight spend declined by -6.0% year-on-year, from R 29.8-billion to R 28.0-billion. Average spend per trip dropped -28.0%, from R 3,220 to R 2,318.

Total bednights grew by +7.2% to 39.0-million, surpassing the previous high of 37.8-million in Q2 2023. However, the average length of stay shortened by -18.0% to 3.2 nights.

EXECUTIVE SUMMARY

PROVINCIAL DOMESTIC OVERNIGHT TRAVEL REVIEW

KwaZulu-Natal emerged as the leading destination province in Q2 2025, with overnight trips more than doubling (+134.2%) to 2.4-million. The province recorded the highest total spend at R 4.6-billion and the most bednights at 6.7-million, driven by strong VFR and religious travel.

Limpopo became the second most-visited province, with 2.0 million trips (+51.4%), although total spend declined by -44.1%, reflecting the prevalence of lower-yield VFR trips.

Gauteng, the third-most visited province, with 1.6 million trips, experienced declines across all indicators: trips to this province fell by 25.8%, spending dropped by 23.3% to R4.5 billion, and bednights contracted by 60.7% to 4.4 million.

The Western Cape recorded balanced growth, with trips increasing by +78.8%, spend rising by +20.4% to R4.0 billion, and bednights almost doubling (+94.9%).

The North West experienced trip growth of +57.6% and a surge in spend of +116.1% to R 3.7-billion, although bednights declined by -25.4%.

Mpumalanga also showed strong trip growth, as well as total spend reaching R 3.3-billion.

The Eastern Cape recorded an increase in total spend, reaching R 2.5-billion. In contrast, Limpopo and the Free State saw declines in spend.

The Northern Cape, from a smaller base, achieved growth across all indicators.

DOMESTIC DAY TRIPS

Day trips grew moderately +7.5% to 29.9-million, while spend fell -2.1% to R 36.9-billion.

VFR and personal shopping were the primary purposes for day trips, with VFR trips up +53.6% to 10.6-million and personal shopping at 7.1-million.

Professional and business-related day trips rose +53.1% from 2.0-million day trips in Q2 2024 to 3.1-million in Q2 2025.

Holiday-related day trips, however, declined sharply, falling from 5.7 million to 3.4 million.

EXECUTIVE SUMMARY

KEY INSIGHTS

1. **Volume vs. Value:** Tourism volumes reached record highs, but spend contracted, reflecting affordability pressures.
2. **VFR & Religious Travel:** VFR is now the dominant driver of volume and spend, while religious tourism re-emerged at scale. Holiday travel fell sharply.
3. **Provincial Shifts:** KwaZulu-Natal, Limpopo, and the Western Cape outperformed. Gauteng weakened as a destination, but remained the primary source of travellers.
4. **Day Trip Alignment:** Day trip trends mirrored overnight travel, with growth in VFR and business segments and decline in holiday-related travel.
5. **MICE Weakness:** Large-scale business travel remains depressed, with its share falling from 4.1% to 1.6%.

STRATEGIC OVERVIEW & RECOMMENDATIONS

1. **Embrace the VFR Market:** VFR is the primary driver of volume, generating R 11.6-billion in Q2 2025. Strategies should promote local attractions, experiences, and retail opportunities for hosts and guests. Campaigns such as “Be a tourist in your own city” can stimulate local spending.
2. **Re-evaluate the Holiday Segment:** Holiday travel is under pressure from economic constraints and calendar shifts. Focus on affordability through shorter, accessible packages, off-season promotions, and value-for-money destinations.
3. **Cultivate Niche Growth Areas:** Religious and professional travel are growth segments. Provincial boards, particularly in KwaZulu-Natal and Limpopo, should engage religious organisations to support pilgrimage travel. For business travel, focus on hybrid business/leisure options as large-scale MICE remains weak.
4. **Address Provincial Gaps:** Provinces reliant on holiday or business tourism risk underperformance. Gauteng should promote urban VFR and short-breaks, while KwaZulu-Natal should convert high visitor volumes into higher per-capita spend through enriched local experiences.

CONCLUSION

Q2 2025 highlights resilience and adaptation in domestic tourism. Growth is being driven by a high-volume, low-yield traveller focused on affordability and connection. The industry must innovate and deliver value in line with this new reality.

HEADLINE INDICATORS

OVERNIGHT TRIPS

12.1m
+30.7%

OVERNIGHT SPEND

R 28.0b
-6.0%

AVG. OVERNIGHT SPEND

R 2,318
-28.0%

BEDNIGHTS

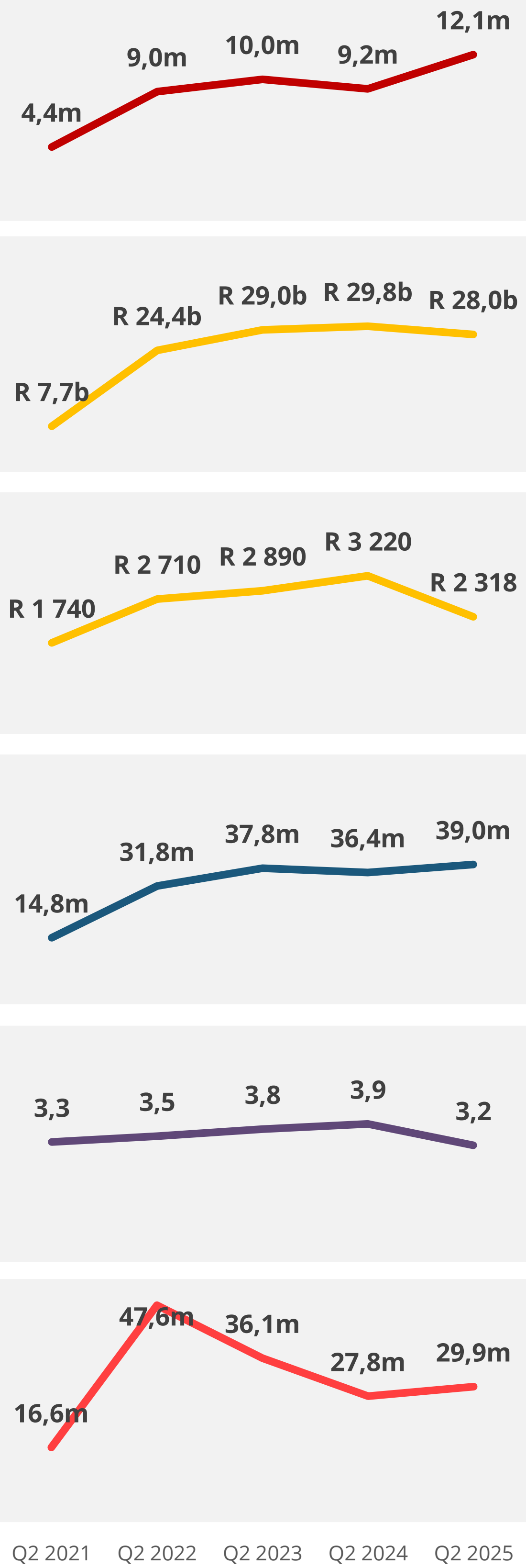
39.0m
+7.2%

LENGTH OF STAY

3.2
-18.0%

DAY TRIPS

29.9m
+7.5%



APR-JUN 2025

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.

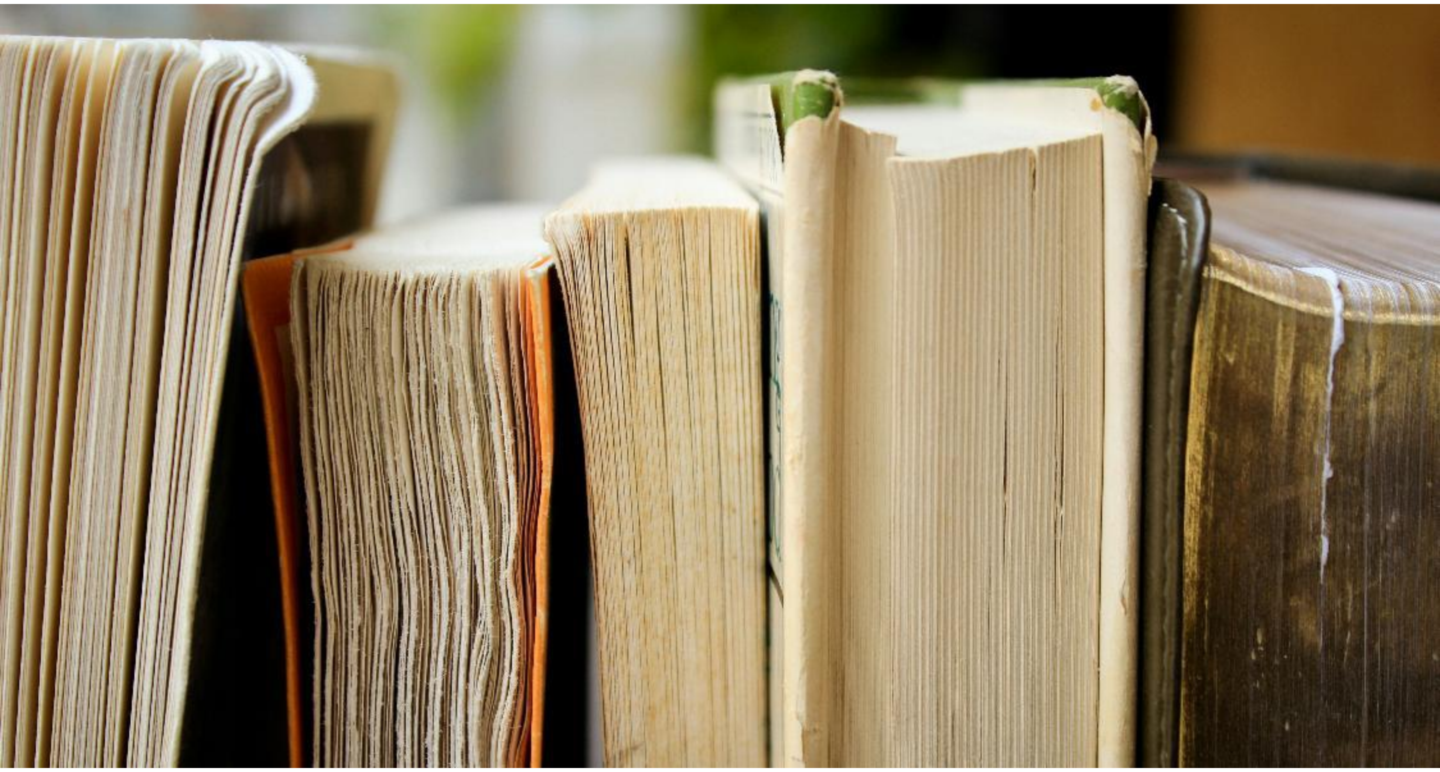
The monthly sample consists of 1,300 adult respondents, and data is collected through face-to-face interviews conducted in the respondent's home.

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

1. Statistical Release P0441: Gross Domestic Product – Fourth quarter 2024. 04 March 2025. Statistics South Africa.
2. Statistical Release P0441: Consumer Price Index. June 2025. Statistics South Africa.
3. Statistical Release P0211 : Quarterly Labour Force Survey (QLFS) – Q2: 2025. 12 August 2025. Statistics South Africa.
4. https://www.resbank.co.za/en/home/what-we-do/statistics/key-statistics/current-market-rates
5. Department of Mineral Resources and Energy (DMRE)
6. https://www.resbank.co.za/en/home/publications/publication-detail-pages/quarterly-bulletins/quarterly-bulletin-publications/2025/june

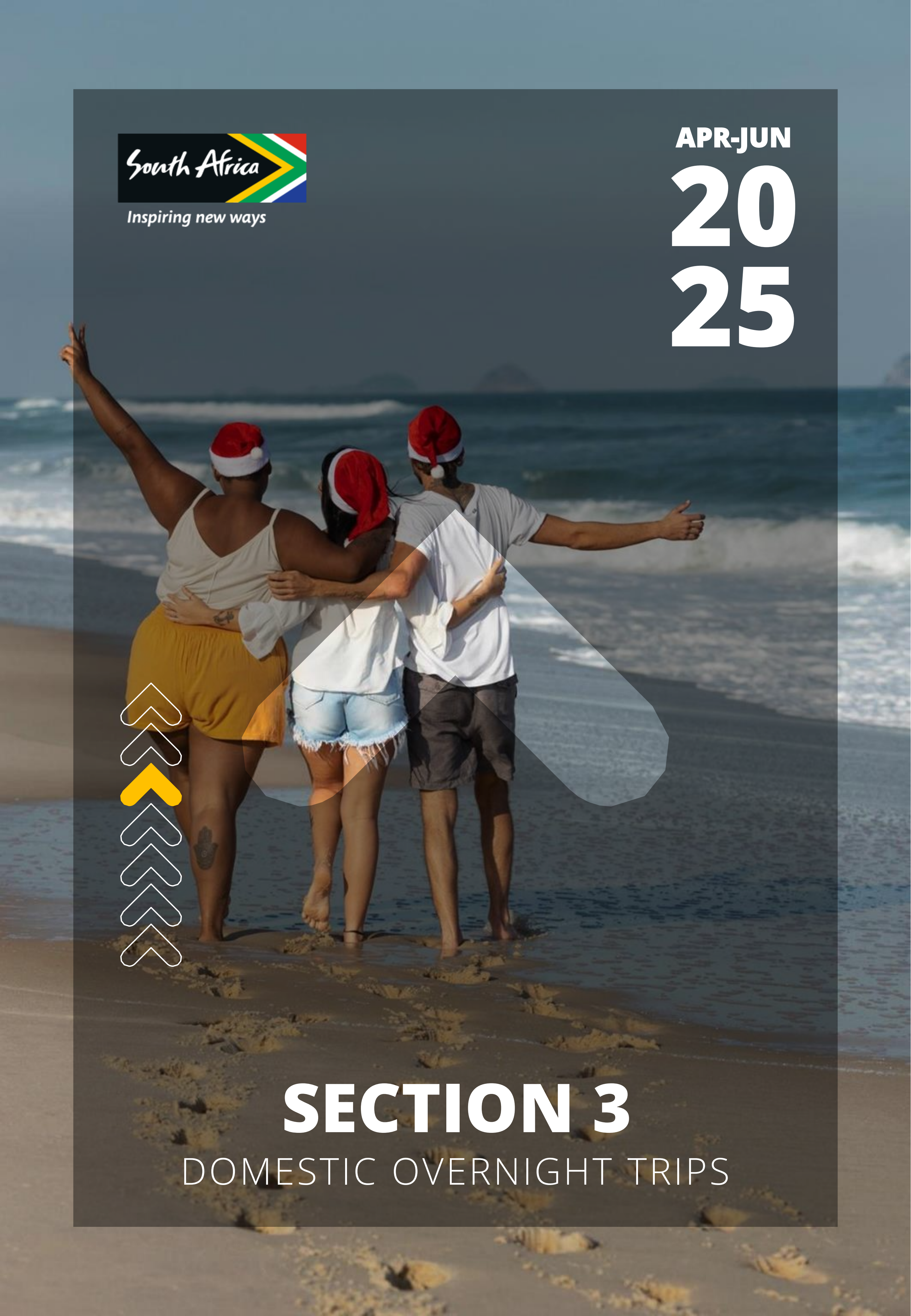


DISCLAIMER

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.



APR-JUN 2025

SECTION 3

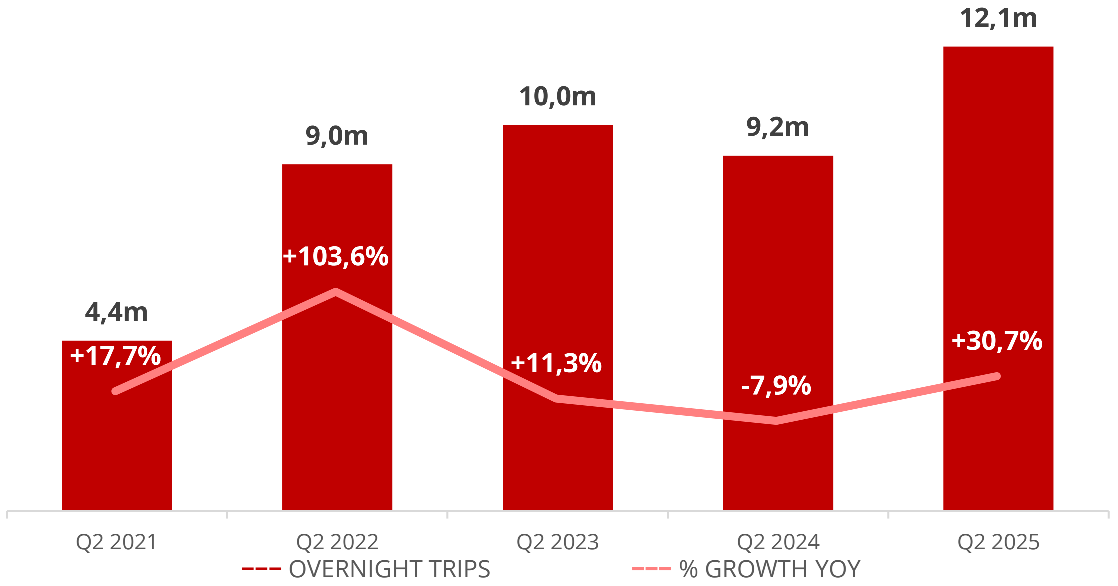
DOMESTIC OVERNIGHT TRIPS

OVERNIGHT TRIPS **12.1m** +30.7%

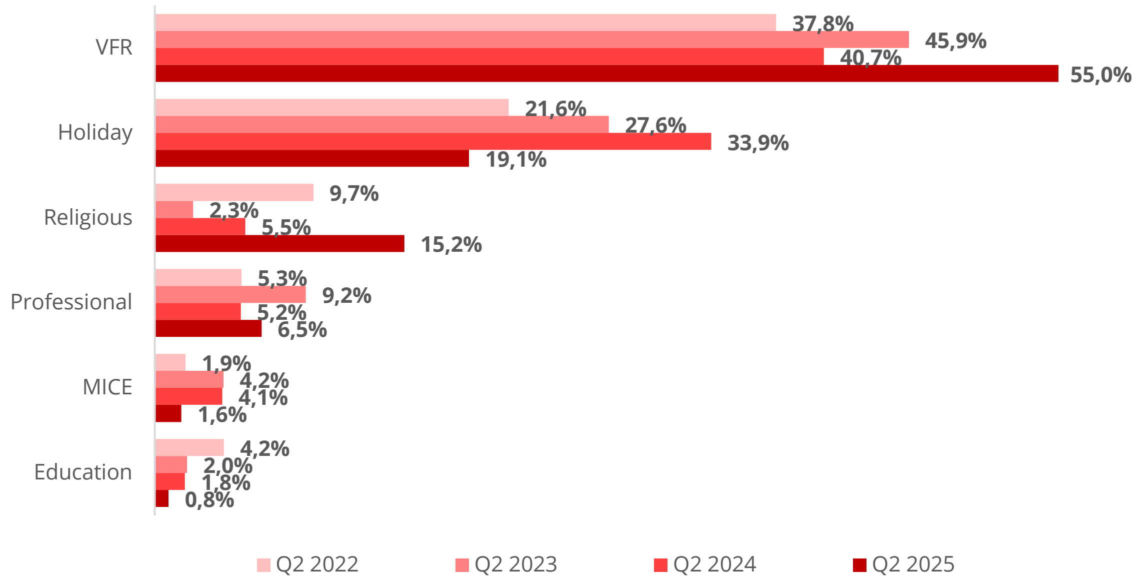
Domestic overnight travel rebounded strongly in Q2 2025, reversing the downturn seen a year earlier. Overnight trips jumped 30.7% in Q2 2025, climbing to 12.1 million – up from 9.2 million in Q2 2024, and surpassing the previous high of 10.0 million trips recorded in Q2 2023.

VFR rebounded strongly, with its share of travel increasing from 40.7% to 55.0%, and remained the leading purpose for overnight trips for the fourth consecutive year since Q2 2022. Holiday travel share fell sharply, dropping from 33.9% in Q2 2024 to 19.1% in Q2 2025. The share of trips for religious purposes grew considerably, rising from 5.5% to 15.2% over the same period, following a decline in Q2 2023. MICE travel declined further, dropping from 4.1% in Q2 2024 to 1.6% in Q2 2025

OVERNIGHT TRIPS: Q2 2021 – Q2 2025



SHARE OF OVERNIGHT TRIPS BY PURPOSE: Q2 2022 – Q2 2025



OVERNIGHT TRIPS 12.1m +30.7%

VFR

6.6m	+76.5%
R 11.6b	+23.3%
R 1,743	-30.2%
22.4m	+35.2%
3.4	-23.4%
55.0%	+35.1%

HOLIDAY

2.3m	-26.2%
R 9.3b	-33.2%
R 4,039	-9.4%
8.4m	-30.9%
3.6	-6.3%
19.1%	-43.5%

MICE

195k	-48.6%
R 803.5m	-45.5%
R 4,117	+6.0%
307k	-78.0%
1.6	-57.1%
1.6%	-60.6%

The VFR category of domestic travel recorded strong growth in Q2 2025 across total trips, total spend, and bed nights.

The number of VFR trips rose sharply by 76.5%, reaching 6.6-million in Q2 2025 compared with 3.8-million in Q2 2024. The VFR share of total trips grew from 40.7% to 55.0% over the same period, reflecting a significant category share gain of 35.1%.

Total VFR spend increased by 23.3% to R11.6-billion; however, the average spend per trip fell notably by -30.2%, to R 1,743.

The total number of VFR bed nights grew by 35.2%, from 16.6-million in Q2 2024 to 22.4-million in Q2 2025. Despite this, the average length of stay shortened from 4.4 nights to 3.4 nights.

The holiday travel sector underperformed in Q2 2025. The category's share of total trips fell by -43.5%, dropping from 33.9% in Q2 2024 to 19.1% in Q2 2025.

Total holiday trips decreased by -26.2% to 2.3-million, while bed nights declined by -30.9%, falling from 12.1-million to 8.4-million. The average length of stay saw a marginal reduction of -6.3%.

Total holiday trip spend contracted sharply by -33.2%, from R14.0-billion to R9.3-billion, with the average spend per trip also falling from R4,460 to R4,039.

The across-the-board declines were likely driven by shifts in travel purpose toward VFR, as well as possible budget constraints affecting holiday travel.

MICE travel accounted for just 1.6% of total domestic trips in Q2 2025, representing a sharp decline in share of -60.6% year-on-year.

The number of MICE trips dropped from 380k to 195k—a significant -48.6% decrease compared with Q2 2024. Bed nights plummeted by -78.0%, falling from 1.4-million in Q2 2024 to 307k in Q2 2025, while the average length of stay dropped steeply from 3.7 to 1.6 nights.

Total spending also fell sharply, from R 1.5-billion to R 803.5-million. Despite the contraction, the average spend per trip rose marginally by 6.0% to R 4,117.

Recovery appears uncertain without fundamental change in business travel demand.

OVERNIGHT TRIPS **12.1m** +30.7%

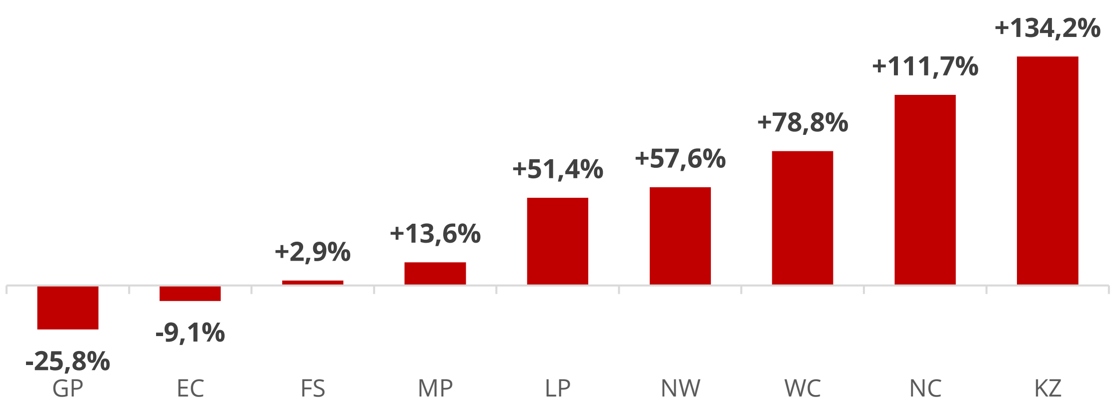
With the exception of Gauteng and the Eastern Cape, all other provinces experienced an increase in growth rates as main destination provinces in Q2 2025.

KwaZulu-Natal (+134.2%) recorded the highest growth, followed by the Western Cape (+78.8%), the North West (+57.6%) and Limpopo (+51.4%). The Free State and Mpumalanga showed more moderate increases. Although the Northern Cape increased by +111.7%, this was from a much smaller base compared to the other provinces.

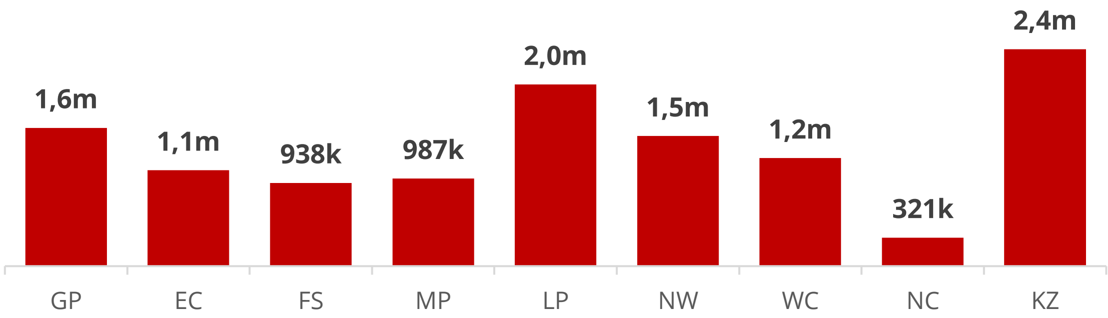
In contrast, Gauteng (-25.8%) and the Eastern Cape (-9.1%) both declined as destination provinces. Despite these declines, Gauteng (with 1.6-million trips) and the Eastern Cape (with 1.1-million trips) continue to be key destination provinces.

KwaZulu-Natal rose from 1.0-million trips in Q2 2024 to 2.4-million in Q2 2025. The Western Cape grew from 681k to 1.2-million, the North West from 931k to 1.5-million, and Limpopo from 1.4-million to 2.0-million trips.

DESTINATION PROVINCE GROWTH RATE: Q2 2024 v Q2 2025



TRIPS TO DESTINATION PROVINCE: Q2 2025



TRIPS TO DESTINATION PROVINCE: Q2 2023 – Q2 2025

	GP	EC	FS	MP	LP	NW	WC	NC	KZ
Q2 2023	1.4m	1.5m	686k	725k	3.1m	444k	592k	166k	1.4m
Q2 2024	2.1m	1.2m	912k	869k	1.4m	931k	681k	152k	1.0m
Q2 2025	1.6m	1.1m	938k	987k	2.0m	1.5m	1.2m	321k	2.4m

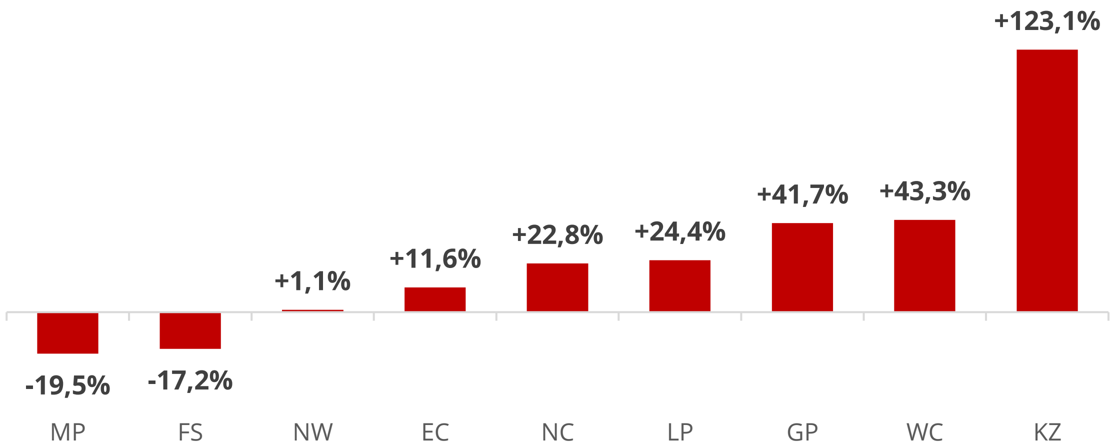
OVERNIGHT TRIPS 12.1m +30.7%

Most provinces experienced an upturn in growth rates as source provinces compared to Q2 2024.

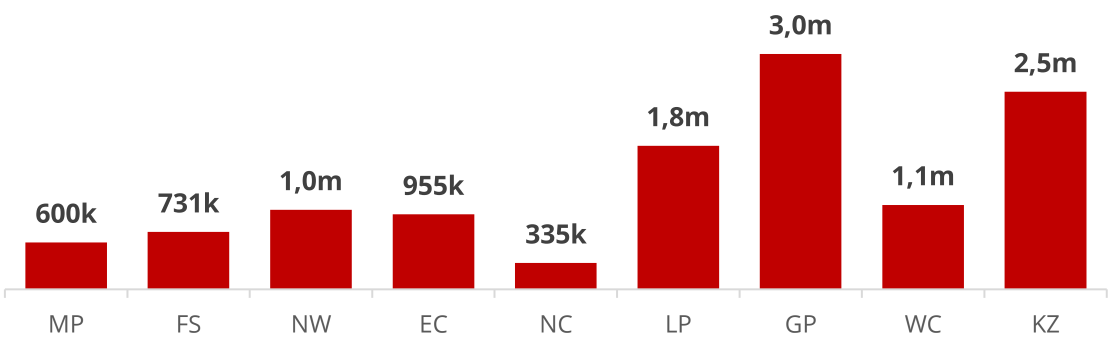
Gauteng, KwaZulu-Natal and Limpopo are the major source provinces for overnight travel. Gauteng (+41.7%) increased from 2.1-million to 3.0-million trips. KwaZulu-Natal (+123.1%) recorded the largest increase, rising from 1.1-million to 2.5-million trips. Limpopo also rose from 1.5-million to 1.8-million trips and the Western Cape (+43.3%) rose from 752k to 1.1-million trips. The North West remained steady at around 1.0-million. The other provinces saw moderate increases ranging from +24.4% to +1.1%.

While most provinces recorded growth, two provinces experienced declines: Mpumalanga (-19.5%) and the Free State (-17.2%) both declined as source provinces in Q2 2025. Mpumalanga dropped from 745k to 600k, while the Free State decreased from 883k to 731k.

SOURCE PROVINCE GROWTH RATE: Q2 2024 v Q2 2025



TRIPS FROM SOURCE PROVINCE: Q2 2025



TRIPS FROM SOURCE PROVINCE: Q2 2023 – Q2 2025

	MP	FS	NW	EC	NC	LP	GP	WC	KZ
Q2 2023	891k	602k	631k	1.1m	144k	2.5m	2.4m	608k	1.1m
Q2 2024	745k	883k	1.0m	856k	273k	1.5m	2.1m	752k	1.1m
Q2 2025	600k	731k	1.0m	955k	335k	1.8m	3.0m	1.1m	2.5m

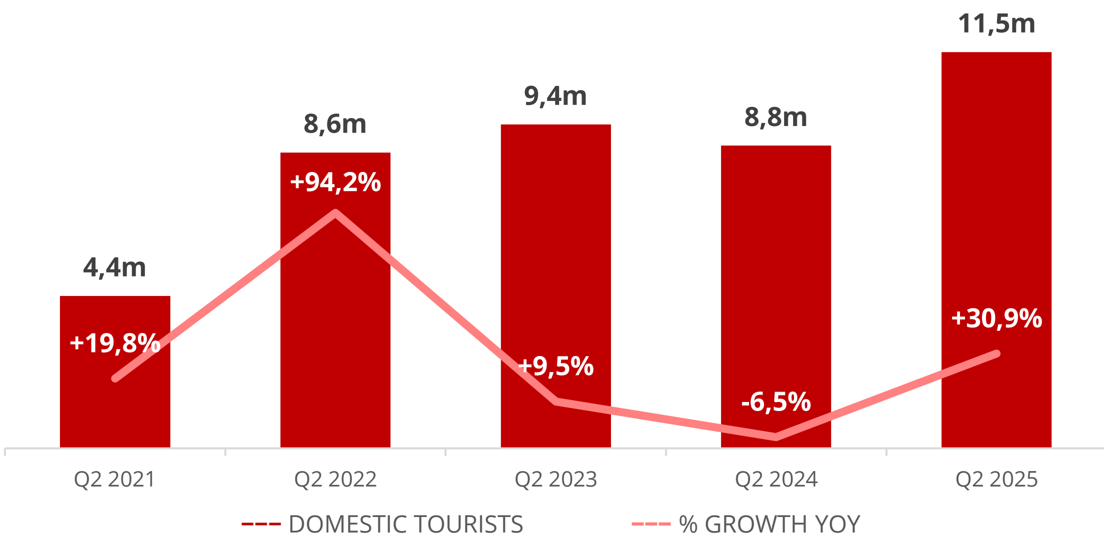
OVERNIGHT TRIPS 12.1m +30.7%

In Q2 2025, the number of domestic tourists rose by +30.9%, reaching a record 11.5-million – up from 8.8-million in Q2 2024 and surpassing the 9.4-million in Q4 2023.

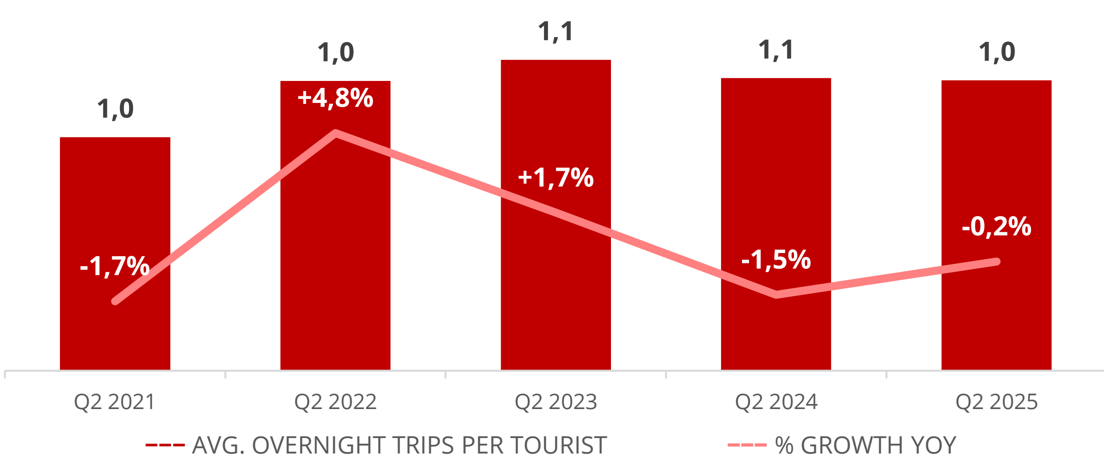
Despite a modest -0.9% decline in the average number of trips per tourist, the indicator remained broadly stable at approximately one trip per person, consistent with historical patterns for the same quarter in previous years.

The implication here is that growth is coming from more people travelling and not from existing travellers taking more trips.

DOMESTIC TOURISTS: Q2 2021 – Q2 2025



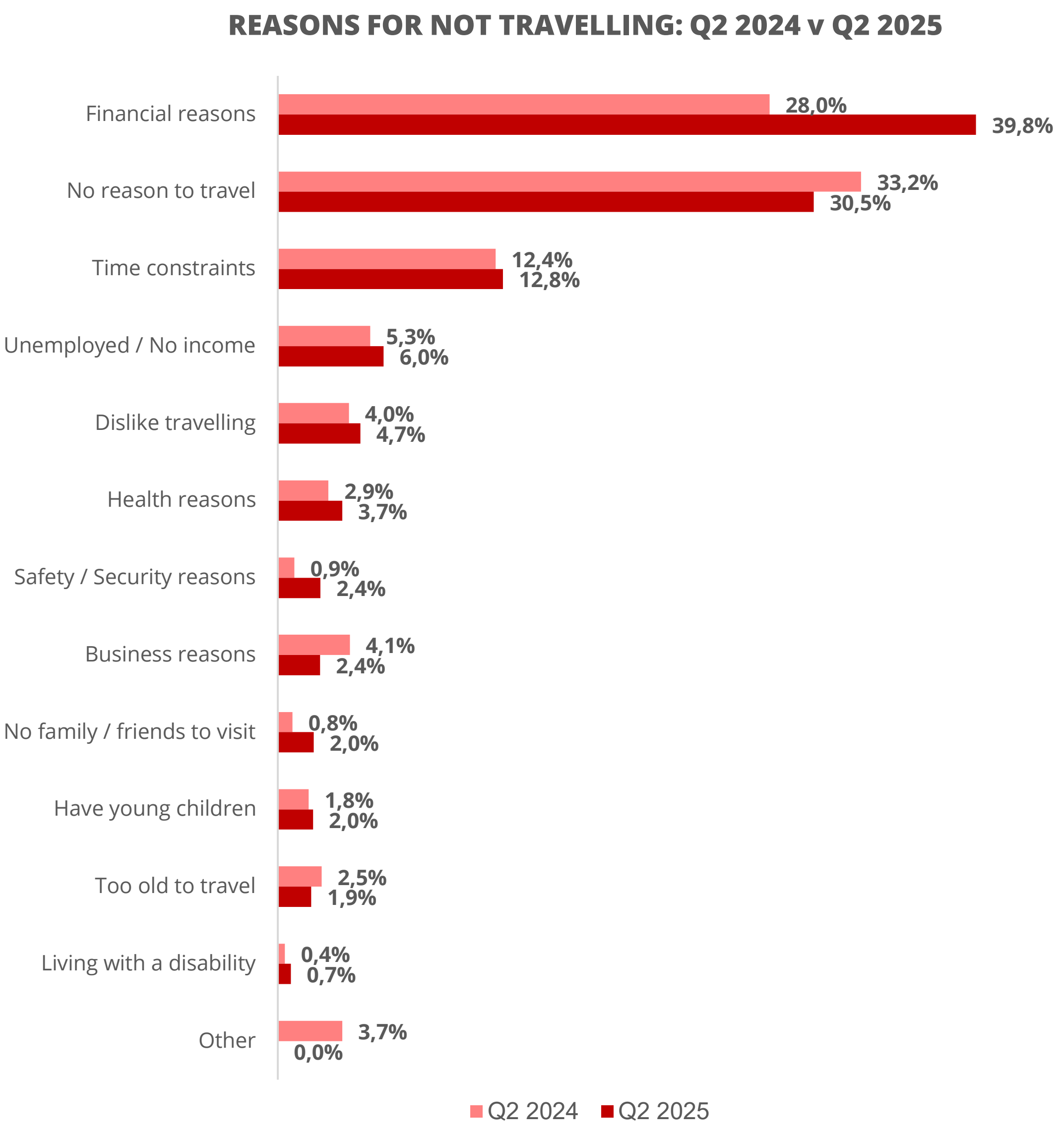
AVG. OVERNIGHT TRIPS PER TOURIST: Q2 2021 – Q2 2025



Consistent with previous year-on-year Q2 trends, the three primary reasons for not travelling were financial reasons, no reason to travel, and time constraints - together accounting for 83.1% of the reasons for not travelling. In fourth place was being unemployed or having no income.

In Q2 2025, the leading cause for not travelling was financial constraints, which rose by 11.8 percentage points, from 28.0% to 39.8%, compared with Q2 2024.

The incidence of no reason to travelling (30.5%) declined slightly, while time constraints (12.8%) and being unemployed/having no income (6.0%) recorded moderate percentage point increases over the same period.



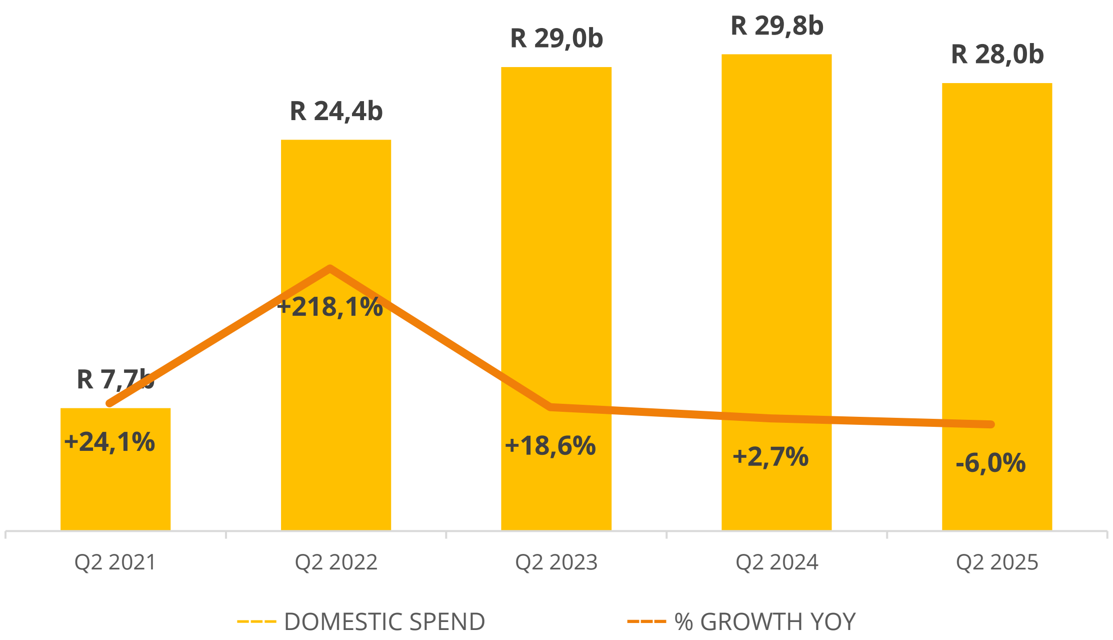
DOMESTIC SPEND R 28.0b -6.0%

Domestic overnight spending declined by -6.0% in Q2 2025, from R 29.8-billion to R 28.0-billion, compared to Q2 2024. In Q2 2025, spending by holidaymakers and VFR accounted for 74.7% of total domestic spending. Although VFR spend grew by +23.3%, holiday spend declined by -33.2%. VFR spend increased from R 9.4-billion to R 11.6-billion, with its share of spend rising to 41.4%. Holiday spend declined from R 14.0-billion to R 9.3-billion, with its share decreasing from 46.9% to 33.3%, compared to Q2 2024.

Religious tourism spend experienced a rise of +313.3%, increasing from R 599.3-million to R 2.5-billion, with its share of spend rising to 8.9%. Spending on trips for professional purposes grew by 60.1%, reaching R 3.1-billion in Q2 2025. MICE spend declined by 45.5% to R 803.5-million.

As seen in the first quarter of 2025, domestic overnight travel spend continued to show strain in Q2 2025. Travel behaviour is shifting toward lower-cost trips, with discretionary leisure holidays in decline. Traditional MICE activity remains under pressure, while individual professional travel show improvement, suggesting business-related tourism may be fragmenting with less reliance on large gatherings.

DOMESTIC SPEND: Q2 2021 – Q2 2025



DOMESTIC SPEND BY PURPOSE: Q1 2024 v Q2 2025

	Q2 2024	Q2 2025	% 2024	% 2025
VFR	R 9.4b	R 11.6b	31.6%	41.4%
Holiday	R 14.0b	R 9.3b	46.9%	33.3%
Professional	R 2.0b	R 3.1b	6.6%	11.2%
Religious	R 599.3m	R 2.5b	2.0%	8.9%
MICE	R 1.5b	R 803.5m	5.0%	2.9%

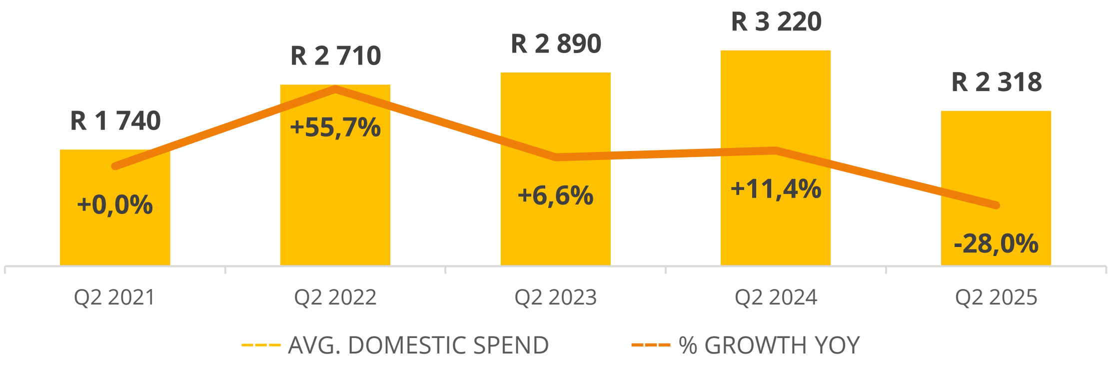
DOMESTIC SPEND **R 28.0b** -6.0%

In Q2 2025, the average domestic spend per trip decreased by -28.0%, from R 3,220 (in Q2 2024) to R 2,318.

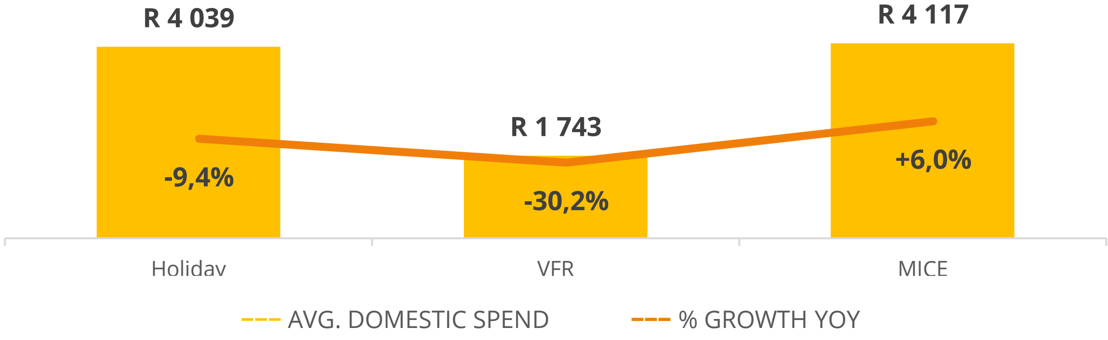
Both Holiday and VFR experienced declines in average domestic overnight spend. Although total VFR spend grew by +23.3% in Q2 2025, it recorded the largest decline in average spend of -30.2%, dropping from R 2,500 (in Q2 2024) to R 1,743 per trip. Holiday average spend decreased by -9.4% to R 4,039. The average spend for MICE increased by +6.0% to R 4,117 per trip.

VFR's combination of higher total spend (up by 23.3%), but significantly lower average spend (down by 32.2%) suggests strong growth in trip volumes (up by +76.5%), with travellers spending less per trip.

AVG. DOMESTIC SPEND: Q2 2021 – Q2 2025



AVG. DOMESTIC SPEND BY PURPOSE: Q2 2025



DOMESTIC SPEND R 28.0b -6.0%

In Q2 2025, personal shopping and leisure & entertainment spend recorded the most significant growth, rising by +197.0% and +92.0%, respectively, compared to Q2 2024. Personal shopping spend increased from R 1.6-billion to R 4.8-billion, while leisure & entertainment spend rose from R 735.2-million to R 1.4-billion. The substantial increase in leisure-related discretionary spending in Q2 2025 mirrors the pattern observed in Q1 2025.

Accommodation spend increased by +28.1%, from R 4.2-billion in Q2 2024 to R 5.3-billion in Q2 2025. Food & beverage also grew by +26.5%, rising to R 6.4-billion.

In previous reports, transport was treated as a single inclusive category. In this report, 'transport' has been divided into two categories: **transport**, which refers to expenses such as plane tickets, bus tickets, and long-distance taxi fares, and **vehicle**, which refers to vehicle-related costs such as fuel and servicing. In the revised classification, expenditure on transport was R 5.0-billion, while vehicle-related expenditure (vehicle) was R 4.3-billion. Together, they account for R 9.3-billion.

DOMESTIC SPEND BY CATEGORY: **Q2 2024 v Q2 2025**

	Q1 2024	Q2 2025	
FOOD & BEVERAGES	R 5.0b	R 6.4b	+26.5%
ACCOMMODATION	R 4.2b	R 5.3b	+28.1%
TRANSPORT	R 6.1b	R 5.0b	-18.2%
PERSONAL SHOPPING	R 1.6b	R 4.8b	+197.0%
VEHICLE	R -	R 4.3b	- %
LEISURE & ENTERTAINMENT	R 735.2m	R 1.4b	+91.2%

BEDNIGHTS

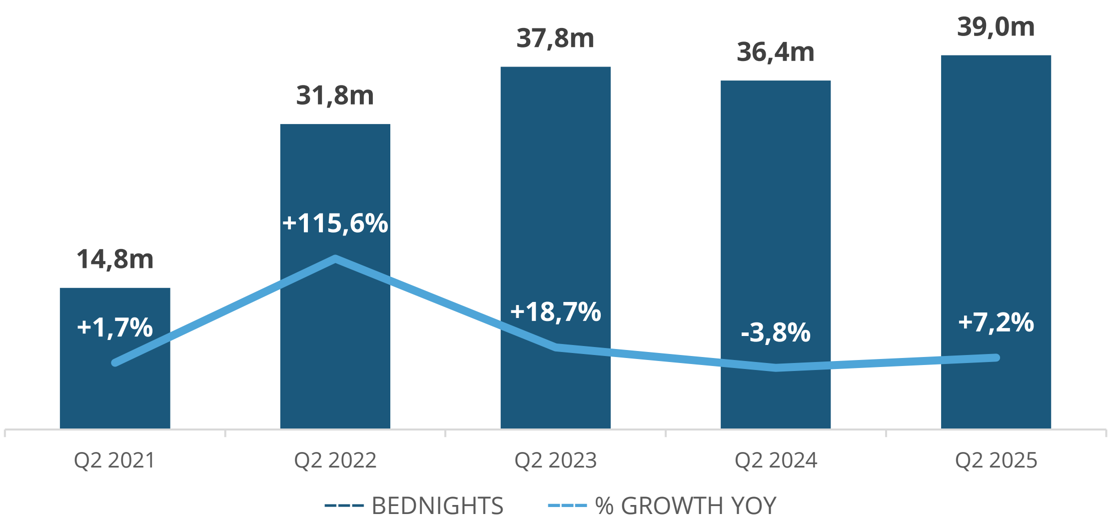
39.0m +7.2%

In Q2 2025, bednights rose by 7.2%, increasing from 36.4-million to 39.0-million, surpassing the previous high of 37.8-million bednights recorded in Q2 2023.

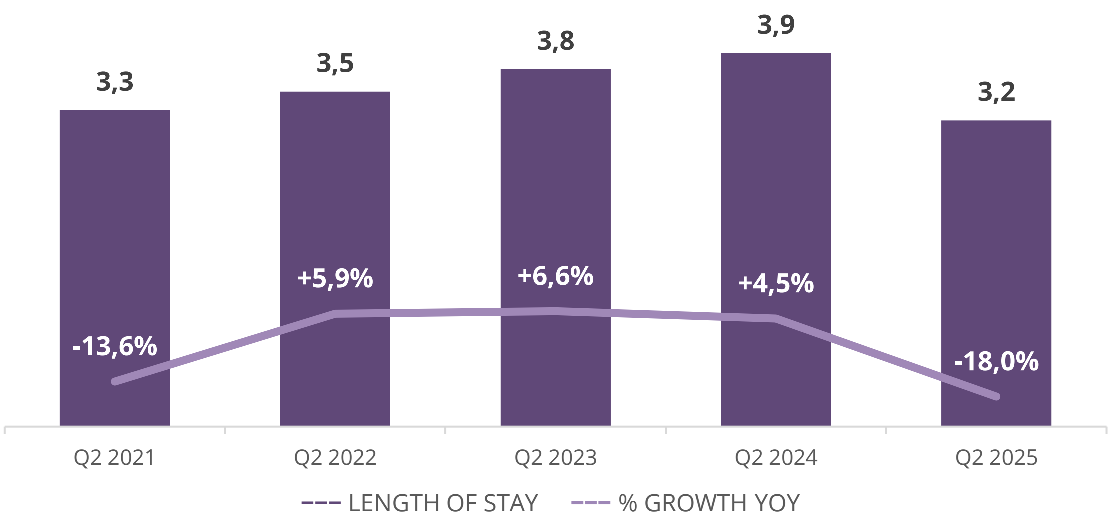
The average length of stay declined by -18.0%, falling from 3.9 nights to 3.2 nights compared with Q2 2024.

This combination – overnight trips up by 30.7% and bednights up by 7.2%, but length of stay down by -18.0% – suggests that while more people are travelling, they are spending less time at their destinations.

DOMESTIC BEDNIGHTS: Q2 2021 – Q2 2025



DOMESTIC LENGTH OF STAY: Q2 2021 – Q2 2025



South Africa
Inspiring new ways

APR-JUN
2025

SECTION 4

PROVINCIAL PERFORMANCE

PROVINCIAL PERFORMANCE

KwaZulu-Natal emerged as the leading main destination province in Q2 2025, recording the largest number of overnight trips at 2.4-million (+134.2%), the highest total spend at R 4.6-billion (but down by -26.6%) and the most bednights at 6.7-million (+84.0%).

Gauteng was the next best-performing main destination province. It recorded 1.6-million trips, making it the third-most visited province. It also had the second-highest total spend (R 4.5-billion) and bednights (4.4-million). However, in comparison to Q2 2024, Gauteng suffered declines across key indicators: overnight trips (-25.8%), total spend (-23.3%), bednights (-60.7%) and length of stay (-47.0%).

Limpopo recorded a +51.4% increase in trips, reaching 2.0-million, and bednights rose to 6.4-million. However, total spend dropped from R 4.7-billion to R 2.6-billion. The Western Cape, the North West and Mpumalanga ranked closely together as the next best-performing provinces in Q2 2025.

Western Cape: Overnight trips rose by +78.8% to 1.2-million, total spend increased by +20.4% to R 4.0-billion, and bednights grew by +94.9% to 4.6-million.

North West: Overnight trips grew by +57.6% to 1.5-million, total spend surged by +116.1% to R 3.7-billion, and average spend rose by +37.1%. However, bednights declined by -25.4% and length of stay dropped from 6.7 to 3.2 nights.

Mpumalanga: Growth was strong across most metrics, with trips up +13.6%, spend up +9.6% to R 3.3-billion, bednights surging +168.9% (from 1.8 to 4.8-million), and length of stay up +146.7% (from 2.1 to 4.9 nights).

The **Eastern Cape** saw a +21.4% increase in total spend, reaching R2.5-billion. The **Free State** had a marginal rise in trips (+2.9%), but declines across all other metrics, with total spend falling by -21.4% to R1.9-billion. Although off a much smaller base, the **Northern Cape** recorded increases in all areas: trips reached 321k, spend rose to R 784.8-million, bednights increased to 1.7-million, and length of stay grew to 5.2 nights.

OVERNIGHT TRIP PERFORMANCE INDICATORS BY MAIN DESTINATION PROVINCE: Q2 2025

	TRIPS	SPEND	AVG SPEND	BEDNIGHTS	LOS
EC	1.1m	R 2.5b	R 2,322	3.3m	3.1
FS	938k	R 1.9b	R 2,008	2.5m	2.6
GP	1.6m	R 4.5b	R 2,916	4.4m	2.8
KZ	2.4m	R 4.6b	R 1,894	6.7m	2.8
LP	2.0m	R 2.6b	R 1,287	6.4m	3.1
MP	987k	R 3.3b	R 3,352	4.8m	4.9
NC	321k	R 784.8m	R 2,444	1.7m	5.2
NW	1.5m	R 3.7b	R 2,498	4.7m	3.2
WC	1.2m	R 4.0b	R 3,291	4.6m	3.8

PROVINCIAL PERFORMANCE

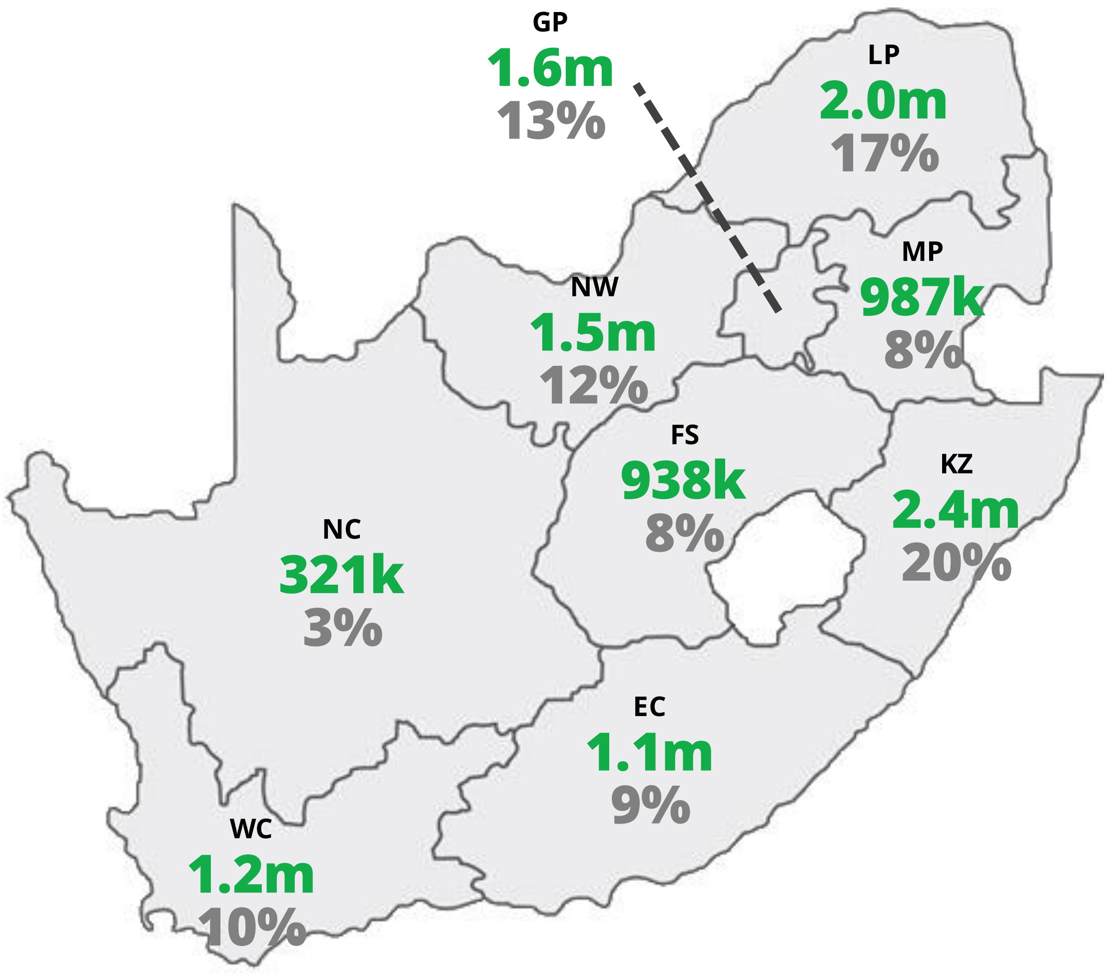
In Q2 2025, the total number of overnight trips across South Africa's nine provinces was 12.1-million.

The top three provinces visited as main destinations accounted for 50.2% (6.1-million) of all overnight trips. KwaZulu-Natal emerged as the leading main destination province, recording the highest number of overnight trips at 2.4-million (20%), followed by Limpopo with 2.0-million (17%) and Gauteng with 1.6-million (13%).

The North West, Western Cape and Eastern Cape each recorded over 1-million overnight trips.

The Northern Cape was the least visited province as a main destination, with 321k (3%) overnight trips, followed by the Free State with 938k (8%) and Mpumalanga with 987k (8%).

OVERNIGHT TRIPS BY MAIN DESTINATION PROVINCE: Q2 2025



PROVINCIAL PERFORMANCE

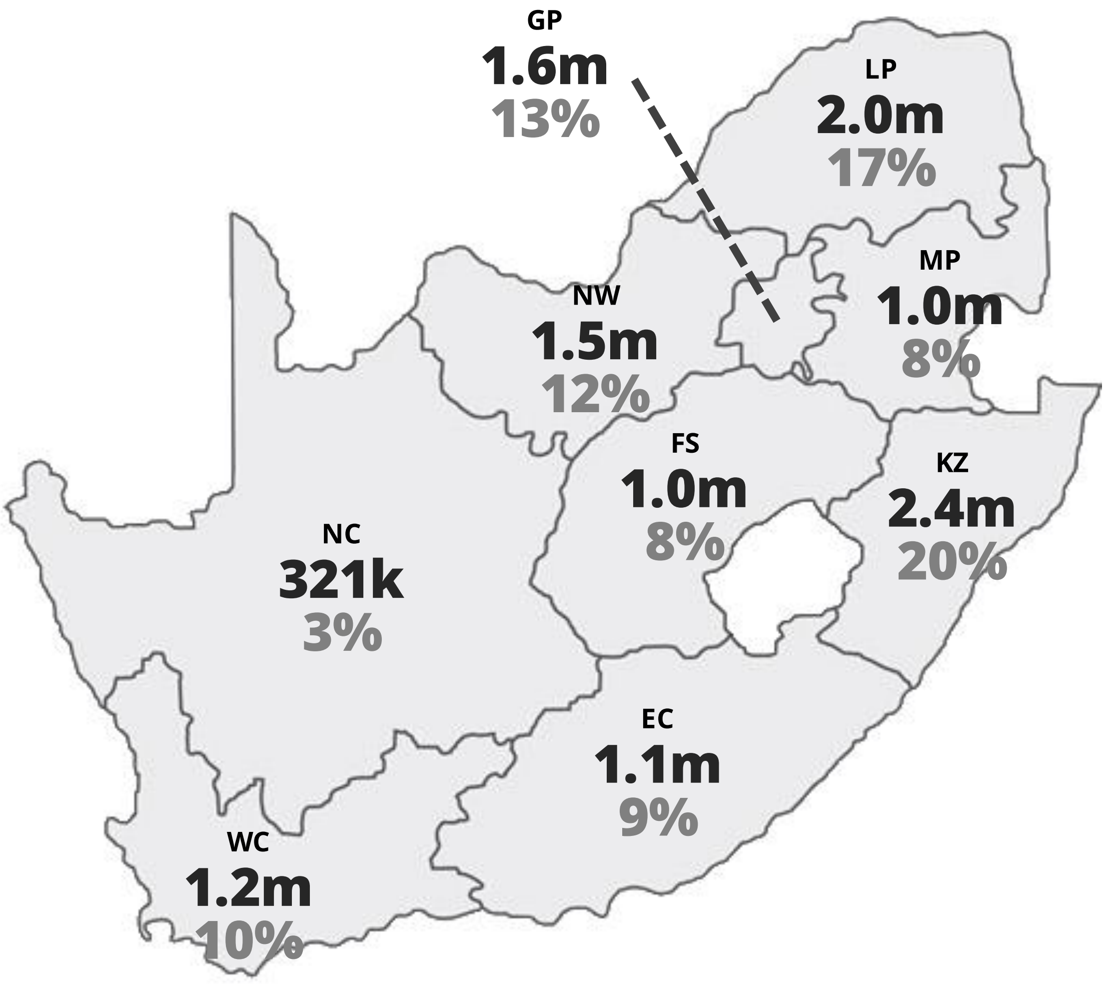
PROVINCES VISITED DURING STOPOVERS

In Q2 2025, the total number of overnight trips across South Africa's nine provinces was 12.1-million. When including provinces visited during stopovers, with some form of economic activity en route to the main destination, the total rises to 12.2-million visits.

Four provinces recorded one-million or more visits that included economically active stopovers, overnight stays, and main destination trips: Gauteng with 1.6-million (13%), the North West with 1.5-million (12%), the Free State with 1-million (8%) and Mpumalanga with 1-million (8%). Together, these four provinces accounted for 42% (5.1-million) of all visits.

The Eastern Cape, KwaZulu-Natal, Limpopo, the Northern Cape, and the Western Cape did not record any stopover visits in Q2 2025.

PROVINCES VISITED: Q2 2025



PROVINCIAL PERFORMANCE

INTRA- AND INTER-PROVINCE TRAVEL

In the second quarter of 2025, the highest proportions of domestic trips taken by residents within their own provinces were recorded in KwaZulu-Natal (77.6%), Limpopo (73.4%), the Western Cape (70.0%), and the Eastern Cape (67.6%).

Moderate levels of intra-provincial (within province) travel were observed in the North West (55.5%), the Northern Cape (52.5%), and the Free State (52.4%).

In contrast, Gauteng functioned primarily as a source province, contributing significantly to domestic tourism flows elsewhere. The largest proportions of trips from Gauteng travelled to Mpumalanga (51.3%), the North West (31.3%), and the Free State (27.3%). Gauteng also accounted for notable shares of trips to Limpopo (20.9%), the Western Cape (19.3%), and KwaZulu-Natal (14.1%).

Trips into Gauteng itself were largely driven by residents of KwaZulu-Natal (18.2%) and Mpumalanga (15.8%). Combined inflows from the North West (4.2%), KwaZulu-Natal (12.2%), the Western Cape (6.7%), and the Free State (24.0%) accounted for 47.5% of domestic trips to the Northern Cape.

INTRA- AND INTER-PROVINCE TRAVEL: Q2 2025
Proportion of Trips to Destination Province

DESTINATION PROVINCE

SOURCE PROVINCE	EC	FS	GT	KZ	LM	MP	NC	NW	WC
EC	67.6%	0.0%	1.7%	4.5%	0.0%	0.0%	0.0%	0.0%	7.3%
FS	0.0%	52.4%	6.1%	1.2%	0.6%	4.5%	4.7%	2.9%	0.0%
GT	9.4%	27.3%	43.2%	14.1%	20.9%	51.3%	0.0%	31.3%	19.3%
KZ	8.3%	11.8%	18.2%	77.6%	0.0%	4.4%	12.2%	1.7%	2.4%
LM	0.0%	0.0%	9.0%	0.0%	73.4%	12.4%	0.0%	4.4%	0.0%
MP	0.0%	0.0%	15.8%	2.7%	1.4%	26.1%	0.0%	0.0%	0.0%
NC	0.0%	3.4%	3.1%	0.0%	0.0%	1.2%	52.5%	4.2%	1.1%
NW	0.0%	5.1%	0.0%	0.0%	3.7%	0.0%	24.0%	55.5%	0.0%
WC	14.6%	0.0%	2.9%	0.0%	0.0%	0.0%	6.7%	0.0%	70.0%

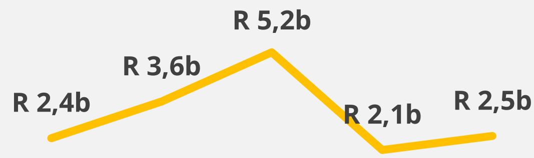
EASTERN CAPE **1.1m** -9.1%

MAIN DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS

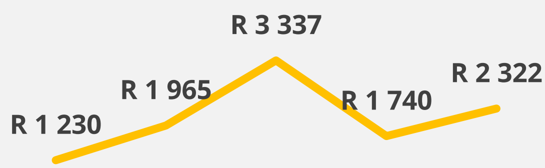
1.1m
-9.1%

OVERNIGHT SPEND



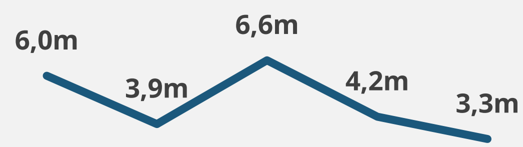
R 2.5b
+21.4%

AVG. OVERNIGHT SPEND



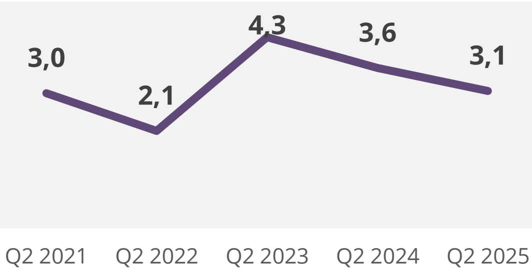
R 2,322
+33.5%

BEDNIGHTS



3.3m
-22.3%

LENGTH OF STAY



3.1
-14.5%

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 1.1m -9.1%

MAIN DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	205k	19.0%	+425.6%
VFR	549k	50.8%	+9.9%
PROFESSIONAL / BUSINESS	19k	1.7%	-81.2%
MICE	82k	7.6%	+227.0%
MEDICAL	-	- %	- %
RELIGIOUS	155k	14.4%	-12.1%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 854.3m	34.0%	+877.9%
VFR	R 911.9m	36.3%	-7.4%
PROFESSIONAL / BUSINESS	R 102.7m	4.1%	-68.1%
MICE	R 94.9m	3.8%	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 368.0m	14.7%	+254.8%

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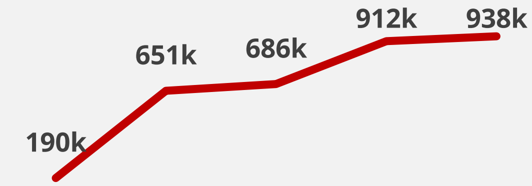
FREE STATE

938k +2.9%

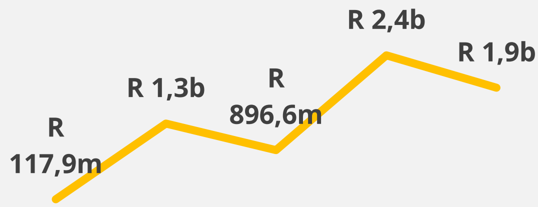
MAIN DESTINATION PROVINCE: FREE STATE

OVERNIGHT TRIPS



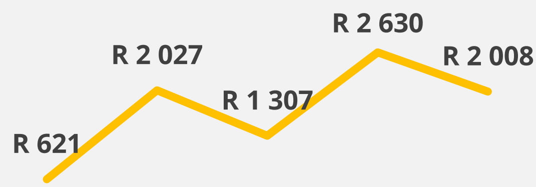
938k
+2.9%

OVERNIGHT SPEND



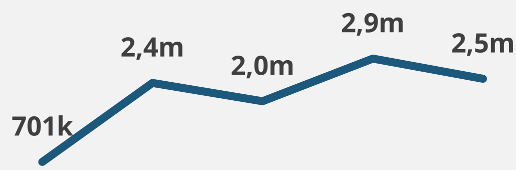
R 1.9b
-21.4%

AVG. OVERNIGHT SPEND



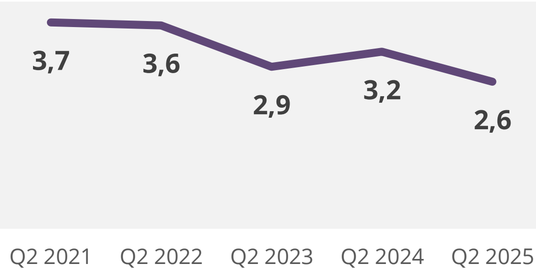
R 2,008
-23.7%

BEDNIGHTS



2.5m
-14.8%

LENGTH OF STAY



2.6
-17.2%

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FREE STATE

938k +2.9%

MAIN DESTINATION PROVINCE: FREE STATE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	135k	14.3%	-45.2%
VFR	497k	52.9%	+13.4%
PROFESSIONAL / BUSINESS	63k	6.7%	-37.6%
MICE	30k	3.2%	+292.8%
MEDICAL	38k	4.0%	- %
RELIGIOUS	157k	16.7%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 382.2m	20.3%	+25.8%
VFR	R 891.2m	47.3%	+5.6%
PROFESSIONAL / BUSINESS	R 69.2m	3.7%	-89.6%
MICE	R 188.1m	10.0%	+172.7%
MEDICAL	R 29.8m	1.6%	- %
RELIGIOUS	R 276.4m	14.7%	- %

Key growth and change rates shown in this report are in comparison to 2023.
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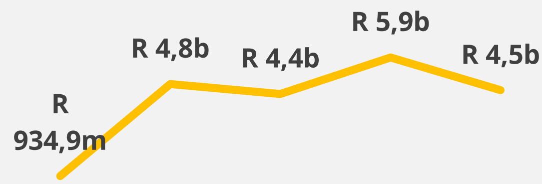
GAUTENG **1.6m** -25.8%

MAIN DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS

1.6m
-25.8%

OVERNIGHT SPEND

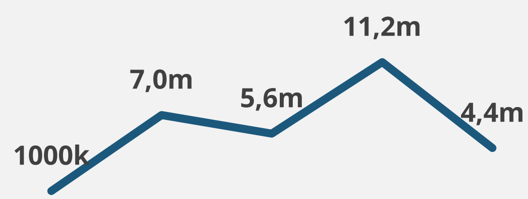


R 4.5b
-23.3%

AVG. OVERNIGHT SPEND

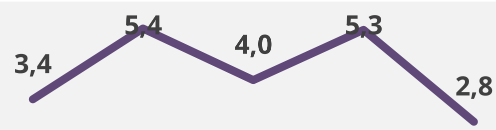
R 2,916
+3.4%

BEDNIGHTS



4.4m
-60.7%

LENGTH OF STAY



2.8
-47.0%

Q2 2021 Q2 2022 Q2 2023 Q2 2024 Q2 2025

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

1.6m -25.8%

MAIN DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	302k	19.4%	-62.5%
VFR	859k	55.1%	-3.1%
PROFESSIONAL / BUSINESS	110k	7.0%	-34.9%
MICE	42k	2.7%	-24.2%
MEDICAL	-	- %	- %
RELIGIOUS	180k	11.5%	+330.9%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.4b	30.1%	-34.1%
VFR	R 2.1b	46.3%	-3.8%
PROFESSIONAL / BUSINESS	R 191.8m	4.2%	-61.2%
MICE	R 440.8m	9.7%	+98.2%
MEDICAL	R -	- %	- %
RELIGIOUS	R 210.9m	4.6%	+24.3%

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KWAZULU-NATAL

2.4m +134.2%

MAIN DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS

2.4m
+134.2%

OVERNIGHT SPEND

R 4.6b
-26.6%

AVG. OVERNIGHT SPEND

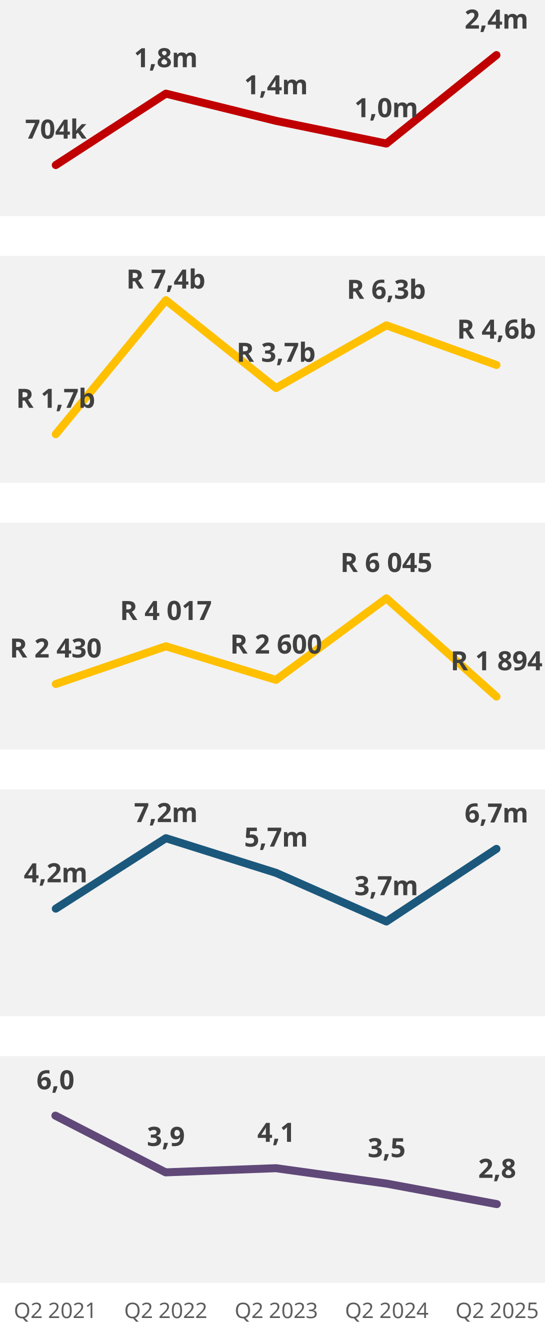
R 1,894
-68.7%

BEDNIGHTS

6.7m
+84.0%

LENGTH OF STAY

2.8
-21.5%



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KWAZULU-NATAL

2.4m +134.2%

MAIN DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	502k	20.5%	-11.4%
VFR	1.3m	55.1%	+286.7%
PROFESSIONAL / BUSINESS	32k	1.3%	+70.4%
MICE	41k	1.7%	+364.4%
MEDICAL	-	- %	-100.0%
RELIGIOUS	508k	20.8%	+7436.0%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.2b	26.1%	-74.9%
VFR	R 2.2b	46.9%	+208.9%
PROFESSIONAL / BUSINESS	R 496.1m	10.7%	+19.8%
MICE	R 79.7m	1.7%	-0.5%
MEDICAL	R -	- %	-100.0%
RELIGIOUS	R 655.9m	14.2%	+4225.0%

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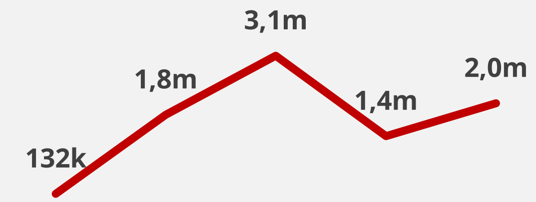
LIMPOPO

2.0m +51.4%

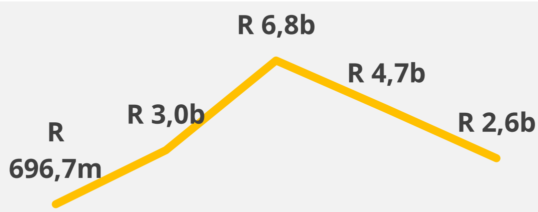
MAIN DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS



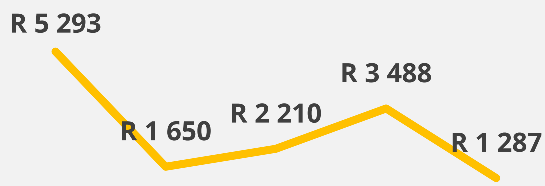
2.0m
+51.4%

OVERNIGHT SPEND



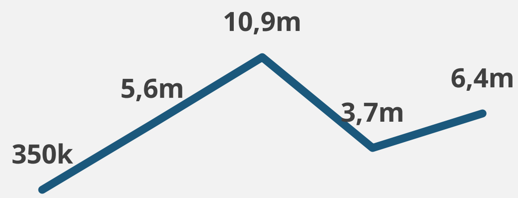
R 2.6b
-44.1%

AVG. OVERNIGHT SPEND



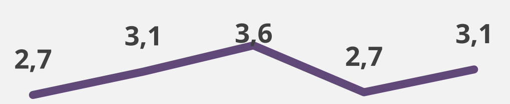
R 1,287
-63.1%

BEDNIGHTS



6.4m
+74.3%

LENGTH OF STAY



3.1
+15.1%

Q2 2021 Q2 2022 Q2 2023 Q2 2024 Q2 2025

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LIMPOPO

2.0m +51.4%

MAIN DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	123k	6.0%	-73.5%
VFR	1.2m	60.1%	+59.4%
PROFESSIONAL / BUSINESS	-	- %	- %
MICE	-	- %	-100.0%
MEDICAL	-	- %	- %
RELIGIOUS	649k	31.7%	+1299.8%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 442.6m	16.8%	-79.2%
VFR	R 1.4b	54.7%	-35.1%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R -	- %	-100.0%
MEDICAL	R -	- %	- %
RELIGIOUS	R 702.2m	26.6%	+4106.2%

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.

MPUMALANGA

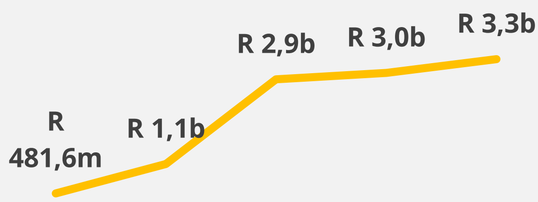
987k +13.6%

MAIN DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS

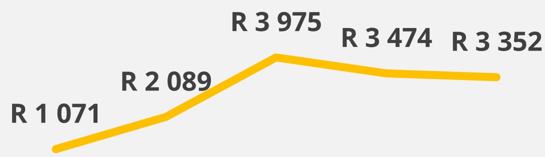
987k
+13.6%

OVERNIGHT SPEND



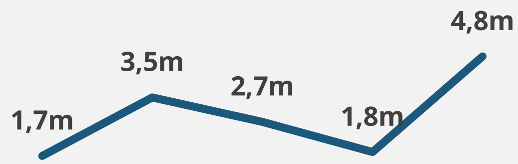
R 3.3
+9.6%

AVG. OVERNIGHT SPEND



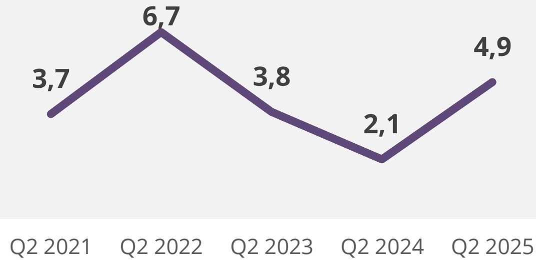
R 3,352
-3.5%

BEDNIGHTS



4.8m
+168.9%

LENGTH OF STAY



4.9
+136.7%

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MPUMALANGA

987k +13.6%

MAIN DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	391k	39.6%	+8.4%
VFR	547k	55.4%	+225.8%
PROFESSIONAL / BUSINESS	-	- %	-100.0%
MICE	-	- %	-100.0%
MEDICAL	-	- %	- %
RELIGIOUS	49k	5.0%	-74.0%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.9b	57.6%	+21.8%
VFR	R 1.3b	40.1%	+42.3%
PROFESSIONAL / BUSINESS	R -	- %	-100.0%
MICE	R -	- %	-100.0%
MEDICAL	R -	- %	- %
RELIGIOUS	R 75.7m	2.3%	+4.2%

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NORTHERN CAPE **321k** +111.7%

MAIN DESTINATION PROVINCE: NORTHERN CAPE

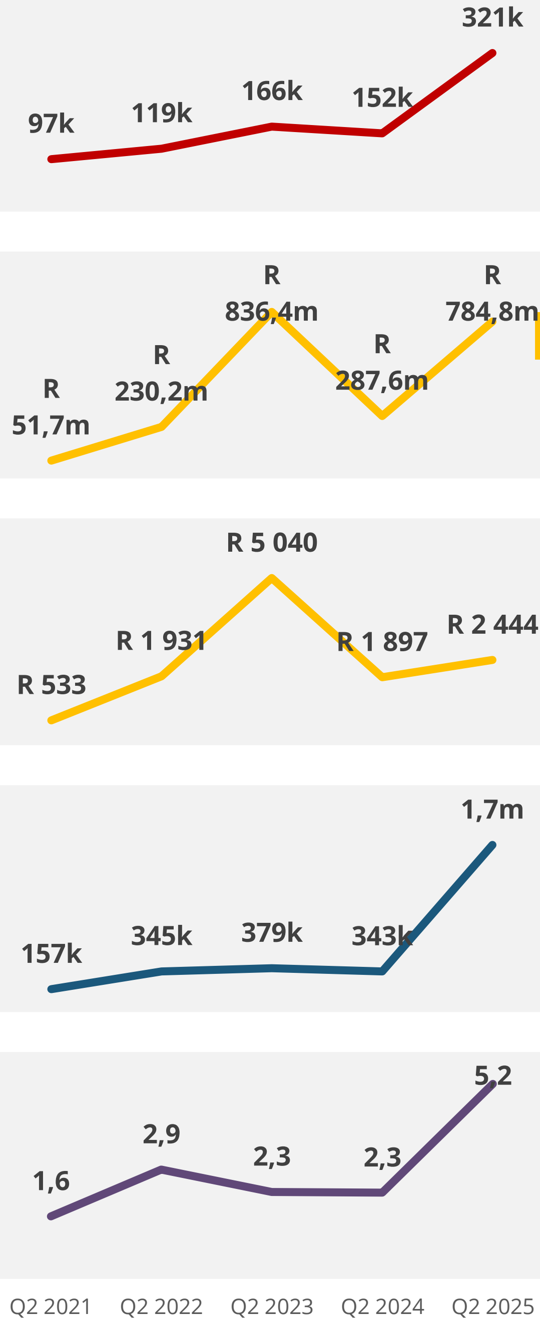
OVERNIGHT TRIPS — **321k** **+111.7%**

OVERNIGHT SPEND — **R 784.8m** **+172.8%**

AVG. OVERNIGHT SPEND — **R 2,444** **+28.9%**

BEDNIGHTS — **1.7m** **+389.5%**

LENGTH OF STAY — **5.2** **+131.2%**



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NORTHERN CAPE 321k +111.7%

MAIN DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	89k	28.1%	- %
VFR	171k	53.8%	+118.4%
PROFESSIONAL / BUSINESS	31k	9.6%	- %
MICE	-	- %	-100.0%
MEDICAL	-	- %	- %
RELIGIOUS	27k	8.5%	+221.9%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 181.5m	23.2%	- %
VFR	R 290.4m	37.1%	+8.6%
PROFESSIONAL / BUSINESS	R 239.5m	30.6%	- %
MICE	R -	- %	-100.0%
MEDICAL	R -	- %	- %
RELIGIOUS	R 70.3m	9.0%	- %

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NORTH WEST

1.5m +57.6%

MAIN DESTINATION PROVINCE: NORTH WEST

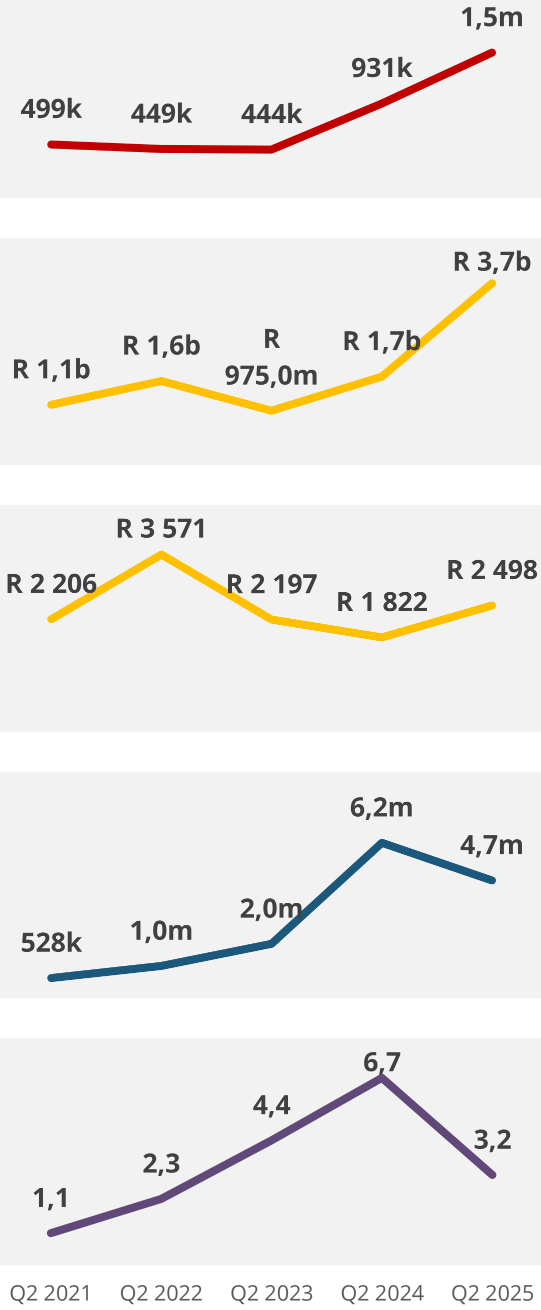
OVERNIGHT TRIPS — **1.5m** +57.6%

OVERNIGHT SPEND — **R 3.7b** +116.1%

AVG. OVERNIGHT SPEND — **R 2,498** +37.1%

BEDNIGHTS — **4.7m** -25.4%

LENGTH OF STAY — **3.2** -52.7%



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

1.5m +57.6%

MAIN DESTINATION PROVINCE: NORTH WEST

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	87k	5.9%	-49.3%
VFR	898k	61.2%	+113.7%
PROFESSIONAL / BUSINESS	374k	25.5%	+701.1%
MICE	-	- %	-100.0%
MEDICAL	-	- %	- %
RELIGIOUS	108k	7.3%	+221.9%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 632.3m	17.3%	+0.9%
VFR	R 1.5b	41.0%	+199.0%
PROFESSIONAL / BUSINESS	R 1.4b	38.5%	+3080.2 %
MICE	R -	- %	-100.0%
MEDICAL	R -	- %	- %
RELIGIOUS	R 117.6m	3.2%	+119.9%

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WESTERN CAPE

1.2m +78.8%

MAIN DESTINATION PROVINCE: WESTERN CAPE

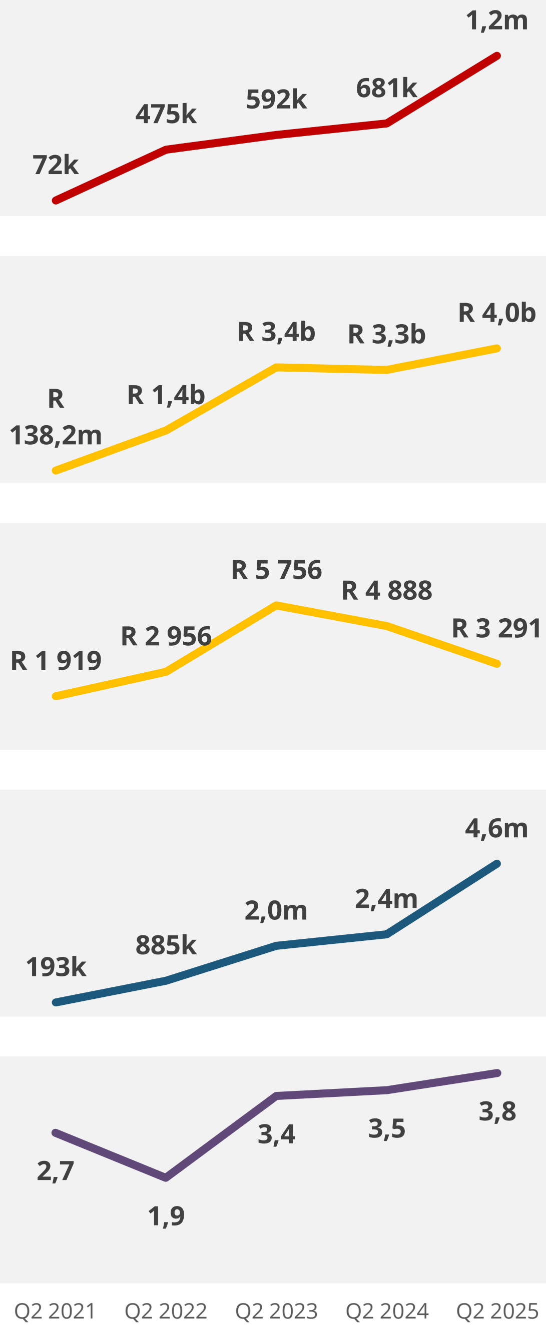
OVERNIGHT TRIPS — **1.2m** +78.8%

OVERNIGHT SPEND — **R 4.0b** +20.4%

AVG. OVERNIGHT SPEND — **R 3,291** -32.7%

BEDNIGHTS — **4.6m** +94.9%

LENGTH OF STAY — **3.8** +9.0%



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 1.2m +78.8%

MAIN DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	471k	38.7%	-0.8%
VFR	541k	44.4%	+260.5%
PROFESSIONAL / BUSINESS	156k	12.8%	+595.8%
MICE	-	- %	-100.0%
MEDICAL	18k	1.5%	- %
RELIGIOUS	-	- %	-%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 2.3b	58.4%	+0.1%
VFR	R 932.3m	23.3%	+25.3%
PROFESSIONAL / BUSINESS	R 615.1m	15.3%	- %
MICE	R -	- %	-100.0%
MEDICAL	R 79.1m	2.0%	- %
RELIGIOUS	R -	- %	-100.0%

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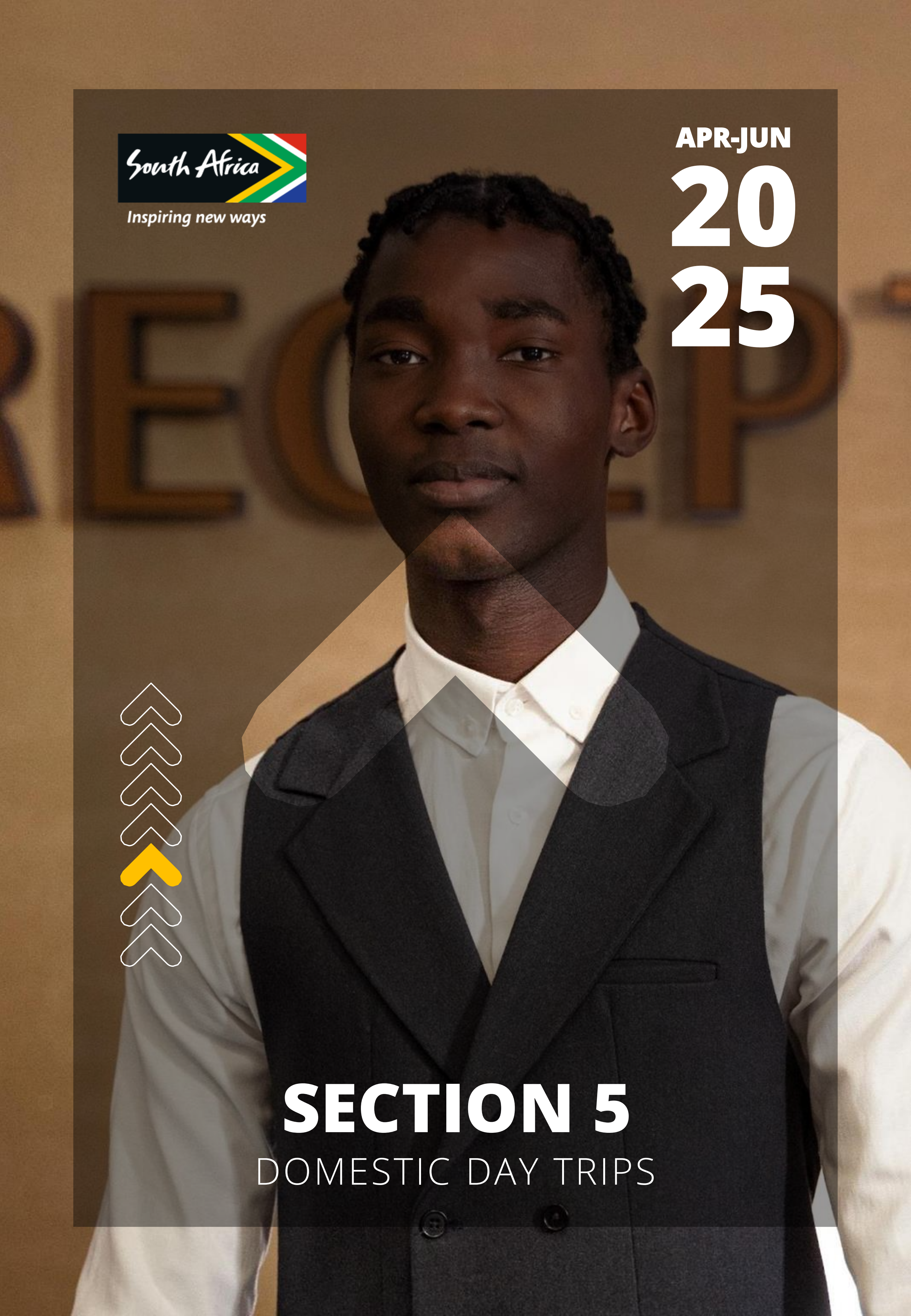

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SECTION 5

DOMESTIC DAY TRIPS

DAY TRIPS

29.9m +7.5%

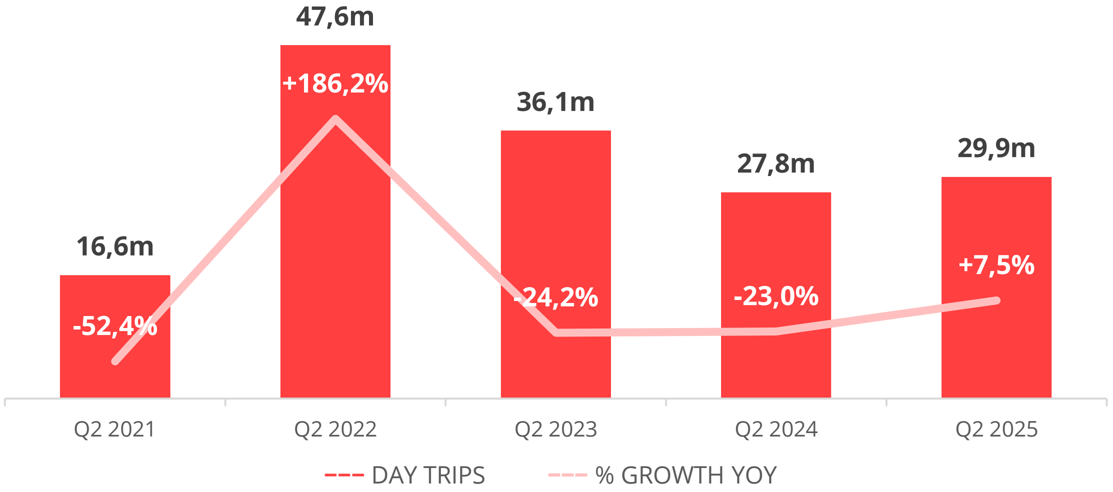
In Q2 2025, domestic day trips recorded moderate growth of 7.5%, reaching 29.9-million. However, this figure remained significantly below the 44.7-million day trips reported in Q2 2022.

VFR and personal shopping were the primary purposes for day trips. VFR demonstrated strong growth, rising by 53.6% to 10.6-million trips, increasing its share of total trips to 35.5%. Personal shopping registered moderate growth of 11.7%, reaching 7.1-million day trips in Q2 2025.

Professional and business-related day trips recorded a strong increase of 53.1%, rising from 2.0-million day trips in Q2 2024 to 3.1-million in Q2 2025.

Holiday day trips declined sharply, falling by 41.0% from 5.7-million to 3.4-million day trips.

DAY TRIPS: Q2 2021 – Q2 2025



DAY TRIPS BY PURPOSE: Q2 2024 v Q2 2025

	Q2 2024	Q2 2025	
VFR	6.9m 24.8%	10.6m 35.5%	+53.6%
PERSONAL SHOPPING	6.4m 22.9%	7.1m 23.8%	+11.7%
HOLIDAY	5.7m 20.5%	3.4m 11.3%	-41.0%
PROFESSIONAL / BUSINESS	2.0m 7.2%	3.1m 10.2%	+53.1%

DAY TRIPS **29.9m** **+7.5%**

In Q2 2025, a more positive picture of domestic day trips emerged, compared with Q2 2024 (up from 27.8-million to 29.9-million day trips).

The largest number of day trips were recorded by Gauteng (6.6-million), KwaZulu-Natal (5.2-million) and Limpopo, despite a 13.7% decline, maintained a strong position with 5.2-million trips.

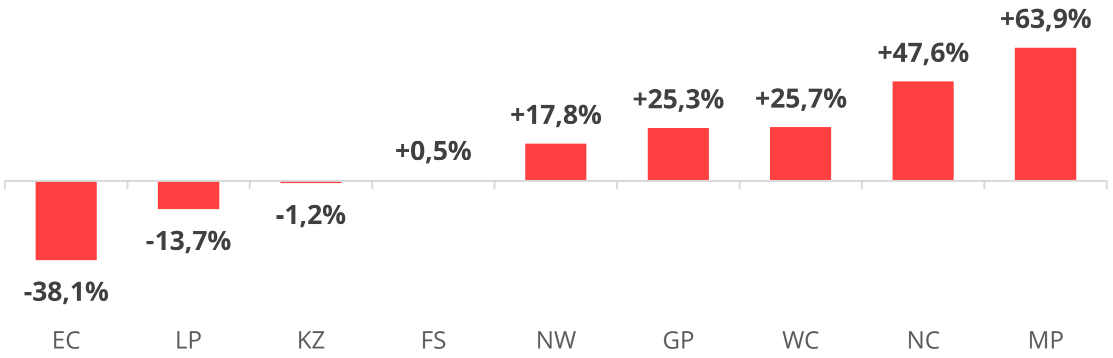
Mpumalanga recorded the highest growth rate, rising 63.9% to 3.4-million day trips, followed by the Northern Cape with an increase of 47.6%.

The Western Cape (+25.7%), Gauteng (+25.3%), and the North West (+17.8%) posted moderate growth rates, while the Free State (+0.5%) remained steady with 2.5-million day trips.

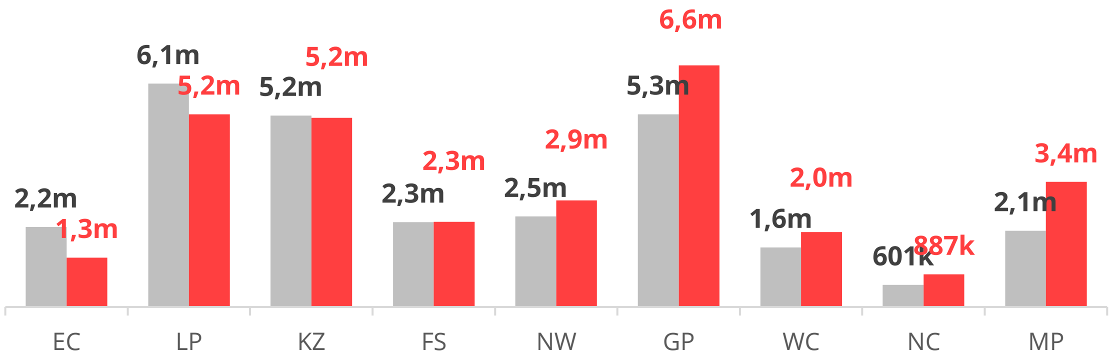
The Eastern Cape experienced the largest drop, decreasing 38.8% from 2.2-million day trips to 1.3-million.

In the current quarter, only the Eastern Cape, Limpopo, and KwaZulu-Natal recorded negative growth rates as source provinces for domestic day trips.

SOURCE PROVINCE GROWTH RATE: Q2 2024 v Q2 2025



DAY TRIPS FROM SOURCE PROVINCE: Q2 2024 v Q2 2025



DAY TRIPS

29.9m +7.5%

With the exception of the Eastern Cape and Limpopo, all other provinces recorded increases in growth rates as main destination provinces for day trips in Q2 2025.

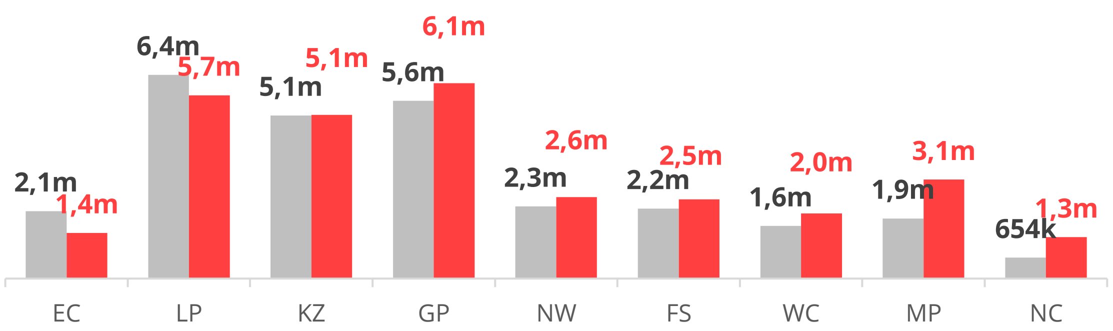
Gauteng held the top spot in Q2 2025 with 6.1-million day trips (+10.1%), followed by Limpopo in second place with 5.7-million trips (-10.0%) and KwaZulu-Natal in third, holding steady at 5.1-million trips.

Mpumalanga grew from 1.9-million to 3.1-million day trips, while the North West, Free State, and Western Cape also recorded growth in Q2 2025. The Northern Cape showed strong growth of +23.9%, reaching 1.3-million day trips.

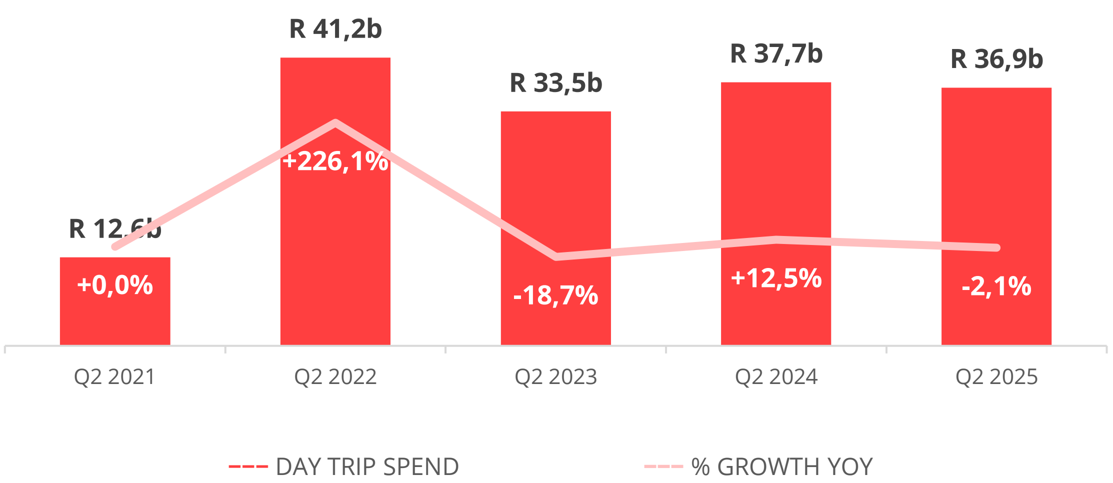
The Eastern Cape, which had 2.6-million day trips in Q2 2023, declined to 2.1-million in Q2 2024 and fell further by 32.3% to 1.4-million in Q2 2025.

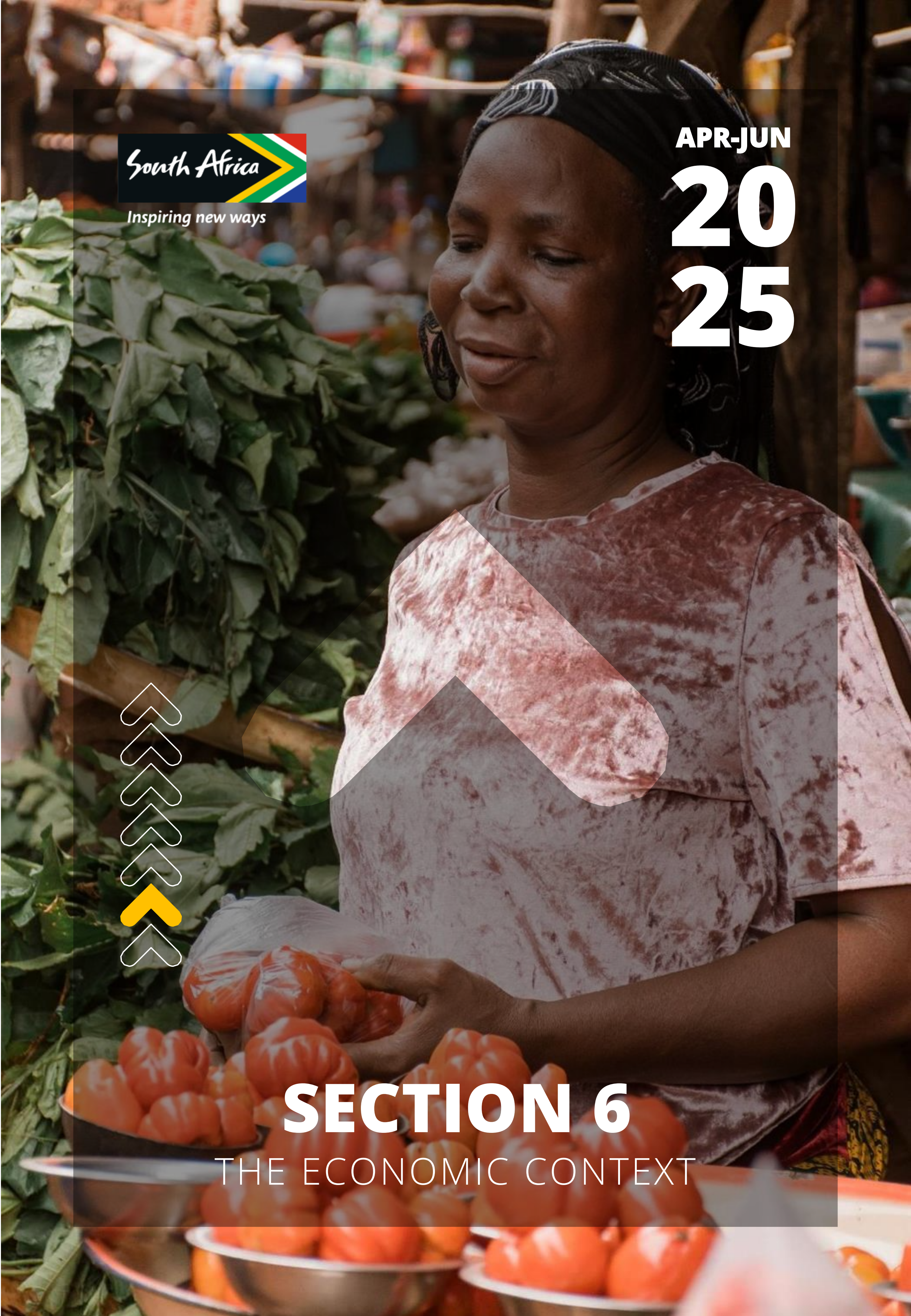
Despite overall growth in day trips (+7.5%), domestic day trip spending declined by 2.1%, dropping from R37.7-billion in Q2 2024 to R36.9-billion in Q2 2025.

DAY TRIPS TO DESTINATION PROVINCE: Q1 2024 v Q2 2025



DAY TRIP SPEND: Q2 2021 – Q2 2025





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Inspiring new ways

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SECTION 6
THE ECONOMIC CONTEXT

THE ECONOMIC CONTEXT

The South African economy significantly affects domestic tourism. Key economic metrics influencing travel in **April to June 2025** are discussed below.

GDP

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

This growth was driven mainly by agriculture, forestry and fishing, which rose 17.2% and contributed 0.4 percentage points. Finance and business services grew 1.1% (+0.3 points), while trade, catering and accommodation increased 1.4% (+0.2 points). In contrast, transport (-1.0%), manufacturing (-0.6%), electricity (-1.4%) and government services (-0.5%) declined.

Government spending fell 0.8%, subtracting 0.2 points due to cuts in goods, services and wages.

INFLATION

South Africa's annual inflation rate rose to 3% in June 2025, up from 2.8% in the preceding two months. The CPI increased by 0.3% in June 2025, following a 0.2% rise in May.[2]

UNEMPLOYMENT RATE

South Africa's unemployment rate rose further to 33.2% in Q2 2025, from 32.9% in Q1 2025. The youth unemployment rate ((ages 15-24), decreased slightly from 62.4% in Q1 to 62.2% in Q2 2025.[3]

PRIME INTEREST RATE

The Reserve Bank cut its key interest rate by 25 basis points to 7.25% on 29 May 2025.[4]

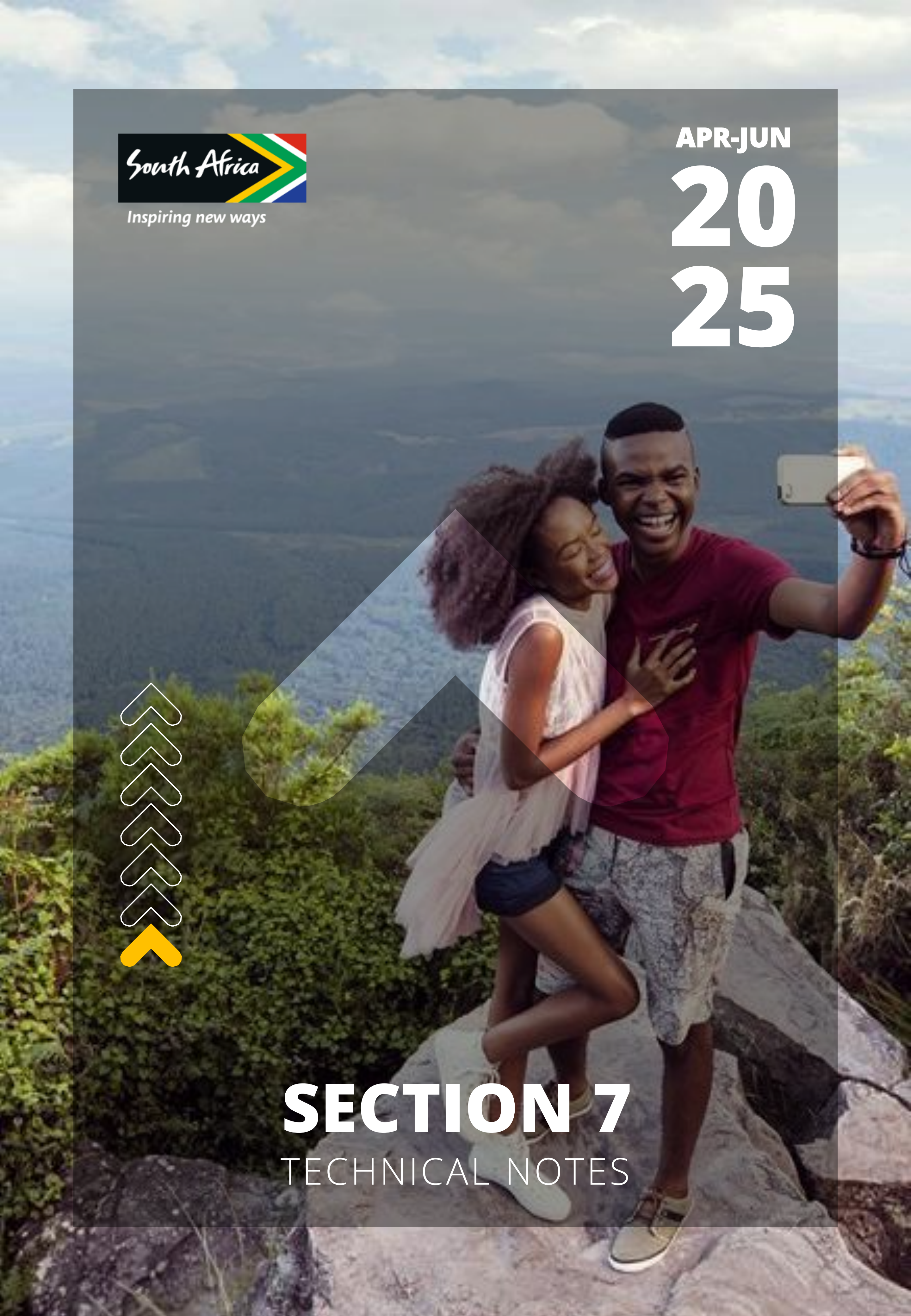
PETROL PRICE

Petrol prices dropped further in June 2025, to R21.35 per litre (inland) and R20.56 (coastal).[5]

HOUSEHOLD DEBT-TO-INCOME

Household debt to disposable income rose to 62.7% in Q1 2025, indicating that household debt grew faster than income. Debt servicing costs declined slightly to 8.9% in Q1 2025, due to lower interest rates.[6]

NOTE: Please references in **Additional Sources** (p.12).



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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 Q2 2025.

PROVINCE	QUARTERLY SAMPLE	ACHIEVED SAMPLE	COMPLETION RESPONSE RATE
Eastern Cape (EC)	468	468	100%
Free State (FS)	284	284	100%
Gauteng (GP)	1032	1032	100%
KwaZulu-Natal (KZ)	688	688	100%
Limpopo (LP)	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 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 are used as explicit stratification variables to ensure good coverage (of the target population). Dwelling type, municipality, main place and sub place are 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.

SELECTION OF 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 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 have been conducted to ensure that the questionnaire is optimised for in field use. 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.

SAMPLE WEIGHTING

The monthly weights calculated for the April, May, and June 2025 surveys have been used to weight the quarterly sample so that it can be extrapolated to the adult population o South Africa.

The development of the weights follows the multi-stage, stratified sample design.

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.

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.

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.

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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		
		Q2 2023	Q2 2024	Q2 2025
Travel Month	April	32.2%	27.2%	39.6%
	May	31.1%	32.4%	28.5%
	June	36.7%	40.4%	31.9%

SHARE OF OVERNIGHT TRIPS, BY MONTH

		Overnight Trips		
		Q2 2023	Q2 2024	Q2 2025
Travel Month	April	31.0%	27.8%	39.9%
	May	31.3%	31.7%	28.2%
	June	37.7%	40.5%	31.9%

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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

		Q2 2023			Q2 2024			Q2 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	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%
	Some primary school	14.8%	4.8%	0.0%	9.2%	10.1%	0.0%	3.4%	0.0%	0.0%
	Primary school completed	2.6%	3.1%	0.0%	1.3%	0.0%	0.0%	0.9%	0.0%	0.0%
	Some high school	21.0%	14.7%	16.5%	14.4%	11.7%	0.0%	28.4%	18.9%	0.0%
	High school completed	35.1%	36.6%	39.4%	46.3%	28.8%	13.5%	37.1%	38.5%	36.5%
	Some college	3.9%	3.2%	0.0%	8.9%	5.0%	0.0%	5.3%	3.3%	0.0%
	College completed	6.5%	3.9%	0.0%	8.8%	6.5%	24.7%	9.2%	13.0%	0.0%
	Some university	1.6%	4.4%	5.1%	1.3%	2.9%	0.0%	4.3%	0.0%	10.4%
	Technikon diploma / degree	4.5%	3.9%	22.7%	2.9%	13.1%	12.1%	3.2%	6.3%	0.0%
	University degree / diploma	6.3%	14.0%	16.3%	3.9%	10.2%	17.5%	4.8%	15.4%	53.1%
	Post-graduate degree	3.7%	10.2%	0.0%	3.1%	11.7%	32.2%	0.8%	4.5%	0.0%
	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	49.8%	55.4%	64.9%	57.0%	59.2%	92.8%	53.6%	55.7%	72.5%
	Female	50.2%	44.6%	35.1%	43.0%	40.8%	7.2%	46.4%	44.3%	27.5%
Marital Status	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Single / Never married	46.4%	49.3%	75.3%	57.7%	66.4%	33.2%	65.7%	61.3%	36.6%
	Married / Living together	34.7%	44.2%	24.7%	38.1%	29.3%	66.8%	21.5%	33.8%	31.7%
	Divorced / Widowed / Separated	18.9%	6.5%	0.0%	4.2%	4.3%	0.0%	12.7%	4.9%	31.7%
	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	31.6%	27.8%	18.6%	22.1%	31.7%	15.7%	25.6%	26.7%	25.8%
	Children, dependent	45.4%	56.8%	81.4%	54.2%	56.6%	84.3%	53.4%	63.5%	69.3%
	Children, independent	17.9%	9.8%	0.0%	20.9%	10.3%	0.0%	17.4%	7.8%	4.8%
	Children, dependent + independen	5.1%	5.6%	0.0%	2.9%	1.4%	0.0%	3.7%	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	8.1%	4.7%	0.0%	6.5%	11.3%	0.0%	7.2%	1.3%	16.3%
	R501 - R750	2.3%	1.6%	0.0%	2.6%	2.8%	0.0%	4.6%	0.0%	0.0%
	R751 - R1,000	7.5%	3.7%	0.0%	2.7%	1.5%	0.0%	6.8%	3.7%	0.0%
	R1,001 - R1,500	0.5%	4.4%	15.6%	6.9%	4.9%	0.0%	4.4%	1.5%	0.0%
	R1,501 - R2,000	9.2%	7.0%	4.7%	7.9%	3.5%	0.0%	2.3%	1.6%	0.0%
	R2,001 - R3,000	22.0%	15.4%	19.0%	22.2%	8.8%	11.5%	23.3%	4.7%	0.0%
	R3,001 - R5,000	19.7%	2.9%	0.0%	5.8%	6.6%	2.0%	13.1%	12.8%	0.0%
	R5,001 - R7,500	5.1%	12.8%	22.5%	11.9%	6.6%	8.5%	5.4%	6.3%	0.0%
	R7,501 - R10,000	2.2%	10.0%	7.3%	8.2%	12.2%	7.2%	5.7%	3.8%	0.0%
	R10,001 - R15,000	8.9%	8.3%	11.3%	2.9%	6.1%	9.6%	4.5%	5.8%	12.3%
	R15,001 - R20,000	3.8%	8.8%	8.9%	4.6%	13.2%	12.1%	3.9%	4.9%	15.4%
	R20,001 - R30,000	2.5%	4.5%	1.4%	4.2%	7.9%	5.2%	6.6%	10.7%	31.7%
	R30,001+	6.7%	8.7%	4.3%	2.3%	5.9%	43.8%	2.7%	14.0%	10.4%
	Refused to answer	0.5%	4.9%	5.1%	5.7%	3.1%	0.0%	7.3%	25.6%	13.9%
	Don't Know / Uncertain	0.1%	2.1%	0.0%	1.9%	1.0%	0.0%	0.5%	1.8%	0.0%
	No income	0.9%	0.2%	0.0%	3.6%	4.7%	0.0%	1.8%	1.5%	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	14.3%	14.0%	35.6%	19.6%	18.5%	4.9%	11.4%	21.1%	16.3%
	25 - 34	20.1%	34.2%	32.9%	20.0%	31.8%	25.0%	29.5%	25.6%	15.4%
	35 - 44	19.2%	22.3%	24.8%	42.3%	24.5%	37.4%	24.4%	35.5%	31.7%
	45 - 54	16.9%	11.9%	1.4%	6.5%	14.7%	32.7%	15.1%	10.6%	36.6%
	55+	29.5%	17.6%	5.3%	11.7%	10.5%	0.0%	19.7%	7.3%	0.0%

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APPENDIX C

OVERNIGHT TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY OVERNIGHT TRIPS

		Overnight Trips		
		Q2 2023	Q2 2024	Q2 2025
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	0.3%	0.0%	1.6%
	Some primary school	10.2%	7.7%	5.9%
	Primary school completed	2.4%	2.1%	0.8%
	Some high school	17.6%	15.4%	24.9%
	High school completed	38.0%	37.3%	39.6%
	Some college	3.1%	6.8%	4.3%
	College completed	4.6%	9.0%	7.8%
	Some university	3.0%	1.9%	3.0%
	Technikon diploma / degree	5.4%	6.7%	3.5%
	University degree / diploma	10.4%	6.4%	6.7%
	Post-graduate degree	5.1%	6.7%	1.9%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	54.1%	55.3%	55.6%
	Female	45.9%	44.7%	44.4%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	48.7%	62.3%	58.2%
	Married / Living together	40.4%	33.0%	29.2%
	Divorced / Widowed / Separated	10.9%	4.7%	12.6%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	27.5%	29.1%	25.5%
	Children, dependent	51.5%	56.0%	54.5%
	Children, independent	16.6%	12.7%	16.2%
	Children, dependent + independen	4.4%	2.2%	3.8%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	7.5%	9.4%	5.7%
	R501 - R750	1.5%	2.6%	4.0%
	R751 - R1,000	4.7%	3.7%	4.6%
	R1,001 - R1,500	3.3%	5.6%	3.4%
	R1,501 - R2,000	7.7%	5.0%	2.3%
	R2,001 - R3,000	18.3%	15.3%	21.8%
	R3,001 - R5,000	12.2%	8.9%	10.8%
	R5,001 - R7,500	11.1%	8.7%	5.2%
	R7,501 - R10,000	5.3%	9.7%	5.6%
	R10,001 - R15,000	8.2%	3.7%	7.7%
	R15,001 - R20,000	5.7%	7.4%	3.6%
	R20,001 - R30,000	4.3%	5.7%	6.7%
	R30,001+	6.3%	5.5%	5.0%
	Refused to answer	2.3%	4.4%	10.3%
	Don't Know / Uncertain	0.7%	1.3%	0.6%
	No income	0.9%	3.1%	2.8%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	13.9%	19.9%	14.2%
	25 - 34	26.0%	26.5%	24.5%
	35 - 44	22.7%	31.6%	27.9%
	45 - 54	13.8%	11.8%	13.5%
	55+	23.7%	10.3%	19.9%

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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		
		Q2 2023	Q2 2024	Q2 2025
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	0.4%	0.8%	1.9%
	Some primary school	2.9%	7.7%	6.1%
	Primary school completed	3.5%	4.2%	1.3%
	Some high school	25.5%	24.5%	25.4%
	High school completed	42.2%	37.7%	42.6%
	Some college	4.2%	3.9%	4.4%
	College completed	4.7%	7.0%	6.6%
	Some university	5.1%	1.2%	2.2%
	Technikon diploma / degree	4.0%	5.3%	3.9%
	University degree / diploma	5.0%	4.6%	4.3%
	Post-graduate degree	2.5%	3.1%	1.2%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	55.5%	56.5%	53.6%
	Female	44.5%	43.5%	46.4%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	62.8%	55.9%	62.2%
	Married / Living together	28.2%	33.9%	27.8%
	Divorced / Widowed / Separated	9.0%	10.2%	9.9%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	26.9%	28.6%	22.4%
	Children, dependent	54.8%	52.8%	58.7%
	Children, independent	13.9%	15.5%	12.3%
	Children, dependent + independen	4.4%	3.2%	6.6%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	7.5%	8.0%	6.5%
	R501 - R750	4.0%	2.4%	3.6%
	R751 - R1,000	4.9%	3.6%	6.9%
	R1,001 - R1,500	7.3%	2.9%	7.9%
	R1,501 - R2,000	13.7%	6.6%	6.6%
	R2,001 - R3,000	12.2%	19.3%	19.8%
	R3,001 - R5,000	12.8%	11.5%	12.1%
	R5,001 - R7,500	5.6%	9.9%	5.2%
	R7,501 - R10,000	7.6%	6.6%	6.2%
	R10,001 - R15,000	6.5%	8.2%	3.8%
	R15,001 - R20,000	3.1%	5.2%	2.7%
	R20,001 - R30,000	2.7%	5.4%	4.4%
	R30,001+	3.4%	3.3%	3.3%
	Refused to answer	2.8%	3.7%	7.6%
	Don't Know / Uncertain	1.2%	0.8%	1.0%
	No income	4.7%	2.6%	2.4%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	22.0%	18.3%	15.9%
	25 - 34	27.8%	25.4%	28.0%
	35 - 44	23.9%	22.9%	25.9%
	45 - 54	12.1%	12.1%	15.0%
	55+	14.2%	21.3%	15.3%

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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	Q2 2025
Main Transport to Destination	Minibus taxi	35.6%	41.5%	45.4%
	My car / van / bakkie	25.0%	24.3%	23.3%
	Another car / van / bakkie	22.6%	18.2%	19.5%
	Tour bus	1.6%	0.3%	6.1%
	Aeroplane	2.7%	3.1%	2.8%
	Commercial bus	3.2%	4.9%	1.9%
	Metered taxi	2.0%	2.7%	1.4%
	Rental car	2.2%	1.0%	0.9%
	App-based taxi (Uber, Bolt, etc.)	0.9%	1.7%	0.5%

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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		
		Q2 2023	Q2 2024	Q2 2025
Accommodation Type	Friends / Relatives	73.3%	74.9%	69.3%
	Guest House	5.8%	6.4%	7.3%
	Camping	0.7%	0.7%	5.2%
	Self-Catering	2.9%	3.3%	4.6%
	Hotel	5.0%	6.7%	4.0%
	Halls	0.3%	0.7%	3.3%
	B&B	3.4%	1.3%	2.2%
	Holiday Home	2.1%	0.2%	1.8%
	Lodge	3.2%	2.7%	1.5%
	Hospital	0.2%	0.8%	0.5%
	AirBnB	0.5%	0.2%	0.3%
	Hostel	0.0%	0.0%	0.1%
	Other Accommodation	2.4%	2.1%	0.0%

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