South Africa
Inspiring new ways

JUL-SEP
20
25

DOMESTIC TOURISM
QUARTERLY PERFORMANCE REPORT

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Inspiring new ways

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EXECUTIVE SUMMARY

CONTEXT

The Quarter 3 2025 Domestic Travel Survey (DTS) results indicate a softening of overall domestic travel demand in South Africa, marking the first decline in overnight trips since Q3 2021. This downturn is primarily driven by increasing economic pressures on travellers, which are causing a significant shift in the purpose and nature of domestic trips.

Despite pockets of growth, most provinces showed signs of strain, with declines in trips, spend, or length of stay, highlighting broad pressure across the domestic tourism market. This leaves leisure and business segments, as well as many provinces, particularly vulnerable to continued economic and market pressures.

Domestic tourism is becoming increasingly uneven and economically pressured. While VFR travel remains resilient, supporting trips, spending, and bednights, discretionary travel, such as holidays, business, and professional trips, is contracting sharply. Is the shift toward VFR travel, driven by travellers prioritising lower-cost, necessity-driven trips in response to economic constraints or financial caution?

Also to be noted are that two key calendar effects shaped Q3 2025 domestic travel. The Term 2 school holidays, shifted almost entirely into Q3 2025 (28 June–21 July), contributed to an uptick in July travel, partially offsetting softer volumes in June, although this increase was not reflected evenly across all indicators. Conversely, the Term 3 school holidays moved to October (3–13 October), and September included only one midweek public holiday (Heritage Day), which typically generates limited overnight travel. Preliminary data suggest that September volumes were lower, with an expected uptick in October, indicating that some of the observed declines and increases in Q3 travel and spend were influenced by these calendar shifts rather than purely underlying demand trends.

EXECUTIVE SUMMARY

KEY INSIGHTS: OVERNIGHT TRIPS & SPEND

Overall Decline: Total domestic overnight trips fell by -10.0%, from 11.5-million in Q3 2024 to 10.4-million in Q3 2025. This decline is being driven by fewer people travelling: domestic tourists down by -5.7% to 10.0-million, rather than existing travellers taking fewer trips.

Financial Barriers to Travelling: Financial reasons for not travelling rose sharply, increasing by 13.9 percentage points to 41.3%. This strongly suggests that economic constraints are increasingly becoming the major barrier to domestic travel.

Budget Tightening: Total domestic overnight spending contracted by -14.9%, from R 33.3-billion to R 28.4-billion, and the average spend per trip decreased by -5.4% from R 2,890 to R 2,734. This indicates a general trend of travellers tightening their budgets.

VFR Resilience and Dominance: Visiting Friends and Relatives (VFR) is the only major category showing growth across all key indicators. VFR trips grew by +20.7% reaching 5.5-million trips, and total VFR spend increased by +8.4% to R 10.8-billion. This category is proving to be resilient, or even counter-cyclical, during economic pressures. VFR's share of total trips grew substantially from 39.4% to 52.9%, reflecting a shift in demand.

Holiday Travel Remains on a Downward Trajectory: Holiday travel performed poorly, with significant declines across all key indicators. Total holiday trips decreased by -13.6% to 2.4-million trips), and total spend contracted by -14.1% to R 11.1-billion. The nearly unchanged average spend per trip for holidays (a slight decrease of -0.1%) strongly suggests that fewer people are taking holiday trips rather than holidaymakers cutting their budgets.

Shorter Overnight Stays: Overall, the average length of stay dropped by -6.4%, from 3.4 to 3.2 nights. Shorter trips across both VFR and holiday reflect time and budget pressures.

Revival in MICE Trips: The MICE category saw an increase in trips and bednights (+128.3%) to 1.7-million. This signals a cautious return to in-person, multi-day events, although the average spend per trip dropped sharply by -37.9%, R 6,700 to R 4,163.

Moderate Growth in Religious Tourism: This niche saw strong growth in spending (+29.0%) to R 1.8-billion), highlighting opportunities for specialised, less economically sensitive tourism.

Shift in Spending Priorities: Despite overall decline, spending grew strongly in discretionary categories: Personal Shopping (+36.7%) to R 4.8-billion, Leisure & Entertainment (+83.3%) to R 1.4-billion, and Accommodation (+81.0%) to R 5.7-billion).

Declining Transport Spend: The sharp drop in overall transport-related expenditure, down from R 13.1-billion to R 8.0-billion, representing a significant decline, suggests fewer people are travelling long distances.

EXECUTIVE SUMMARY

KEY INSIGHTS: PROVINCIAL RESULTS

Top Destinations: KwaZulu-Natal (1.7-million trips) and Limpopo (1.7-million trips) remained the top two main destination provinces, despite both experiencing significant drops in overnight trips (-37.4% and -20.0%, respectively)

Growth Hotspots: Only the North West (+171.1%) and Mpumalanga (+39.3%) recorded substantive growth rates as main destination provinces, with 1.2-million trips and 1.1-million trips, respectively. The North West also saw exceptional growth in total spend (R 3.7-billion) and average spend per trip (R 3,038).

Strong Economic Performers: KwaZulu-Natal generated the highest total expenditure (R 4.8-billion). The Eastern Cape recorded the most bednights (6.7-million) and the longest average stay (5.1 nights), indicating a strong appeal for extended visits.

Source Province Role: Gauteng, with 2.6-million overnight trips, remains the major source province, having the lowest proportion of intra-provincial travel (36.7%).

The Western Cape Experienced Several Setbacks: Total spend dropped to R2.2-billion (-39.7%); average spend fell by 46.8%, from R 5,760 to R 3,065; bednights declined to 3.2-million (-42.7%); and the average length of stay decreased by -49.4%, from 6.2 to 3.2 nights.

KEY INSIGHTS: DAY TRIPS & SPEND

Day Trips are Contracting: Day trips saw a steep decline of -25.5% to 24.5-million in Q3 2025, breaking the growth trend from earlier quarters. The steepest decline was in Limpopo (-72.4%), from 10.3-million day trips to 3.0-million.

Lower Levels of Day Trip Spend: Day trip spending declined by -22.3%, dropping to R 28.1-billion. Domestic day trip spending had also declined in Q1 2025 (-7.3%, R 30.8-billion) and in Q2 2025 (-7.5%, R 36.9-billion).

VFR & Holiday Day Trips Remain Common: The primary purposes for day trips were visiting friends and relatives (VFR) and holiday trips, followed by trips for personal shopping. VFR trips declined by 3.6% to 7.5-million, holiday trips registered moderate growth of 4.8%, reaching 5.7-million, and personal shopping experienced a sharp drop of 36.4%, falling to 4.7-million day trips.

EXECUTIVE SUMMARY

STRATEGIC OVERVIEW & RECOMMENDATIONS

The Q3 2025 results paint a picture of a domestic tourism sector under significant stress and being reshaped by economic hardship. To navigate this environment, the strategy should adopt a two-pronged approach: defending core resilient segments while stimulating value-driven demand to stabilise and grow the sector.

FOCUS ON VFR VALUE MAXIMISATION

- **Insight:** The VFR segment is the primary engine of resilience, and strategic focus here is essential. VFR overnight trips grew significantly (+20.7%), but the average spend per trip fell by -10.2%.

- **Recommendation:** Develop campaigns and bundled offers (e.g., discounted day tours, local dining experiences, or 'Friends & Family' attraction passes) specifically targeting the VFR host and visitor in major source provinces (Gauteng, KZN, Limpopo). The goal is to convert the high volume of low-value VFR trips into higher-value visits by encouraging incremental expenditure on activities (Leisure & Entertainment) and shopping (which showed strong growth).

TARGET INTRA-PROVINCIAL TRAVEL

- **Insight:** The Western Cape (69.9%), the Free State (65.6%), and KZN (63.2%) have the highest proportion of internal trips, suggesting a strong local market.

- **Recommendation:** Support provincial tourism bodies in running highly localised, low-cost campaigns to encourage residents of these provinces to explore regional attractions, leveraging the lower travel costs (shorter distance) to offset other budget constraints.

RE-ENGINEER THE HOLIDAY PROPOSITION

- **Insight:** The decline in overall trips and the rise in financial barriers demand a shift from promoting high-cost, long-distance holidays to affordable, value-packed, and accessible travel options. Holiday trip numbers are falling due to affordability issues, not because holidaymakers are cutting budgets on the trip itself (average spend is nearly unchanged).

- **Recommendation:** Promote shorter-stay, closer-to-home holiday packages (3.2 nights is the new national average), with accommodation as a key value driver, given its strong expenditure growth (+81%). Partner with mid-range providers in easily drivable provinces (e.g., North West, Mpumalanga) to offer inclusive, fixed-price deals that reduce financial uncertainty. Launch budget-friendly, bundled packages and short-stay, high-value itineraries for time-constrained travellers. Promote domestic loyalty programs to encourage repeat travel despite tighter household budgets.

Continued...

EXECUTIVE SUMMARY

INVEST IN HIGH-GROWTH REGIONS

- **Insight:** The North West (+171.1% trips) and Mpumalanga (+39.3% trips) are the fastest-growing destination provinces.

- **Recommendation:** Prioritise co-operative marketing and infrastructure support for these two provinces. Use the North West's exceptional spend growth (+422.9%) to create a case study for high-value VFR/Holiday blending. North West, Northern Cape, and Mpumalanga: Sustain momentum with premium experiences, adventure tourism, and selective infrastructure investments to manage rising demand.

ADDRESS TRANSPORT COSTS AND INFRASTRUCTURE

- **Insight:** The sharp drop in transport-related spending indicates that long-distance travel is unaffordable. Road issues are severely impacting provinces like Limpopo.

- **Recommendation:** Advocate for infrastructure investment in key tourism routes. Promote value-focussed, medium-distance inter-provincial travel from Gauteng to Mpumalanga, the Free State, and the North West, which are key inflow routes.
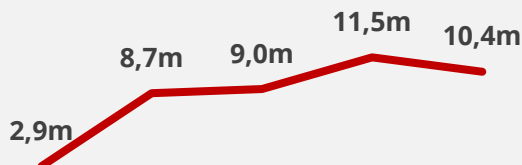
SUPPORT THE MICE SECTOR

- **Insight:** MICE trips are up significantly (+106.9%), signalling a revival, but average spend per trip is down -37.9%.

- **Recommendation:** Target association and corporate travel planners with 'Total Value' packages that highlight extended stays (up to the 3.9-night average) and the cautious return to in-person events. Develop multi-day MICE and short-break packages to stimulate the revival of professional travel. Tailor products for shorter trips and lower per-trip spend to reflect current traveller behaviour.

MANAGE RISK IN LIMPOPO

- **Insight:** Limpopo saw the steepest decline in day trips (-72.4%) and faces a crisis due to poor infrastructure (the R522 and R572) and crime reports.

- **Recommendation:** Immediate crisis management is needed to address the brand threat. Publicly engage with relevant government bodies to prioritise infrastructure repair and security in key tourism areas. Simultaneously, shift marketing to focus on its position as a top-three destination for overnight trips while these issues are addressed. Upgrade critical roads (R522, R572), enhance visitor safety, and promote short, localised trips.
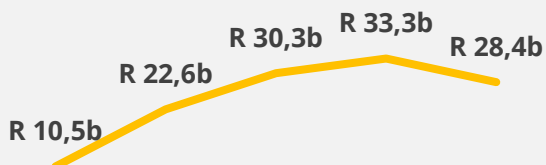
HEADLINE INDICATORS

OVERNIGHT TRIPS

2,9m · 8,7m · 9,0m · 11,5m · 10,4m

10.4m
-10.0%

OVERNIGHT SPEND

R 10,5b · R 22,6b · R 30,3b · R 33,3b · R 28,4b

R 28.4b
-14.9%

AVERAGE OVERNIGHT SPEND

R 3 640 · R 2 600 · R 3 360 · R 2 890 · R 2 734

R 2,734
-5.4%

BEDNIGHTS

12,6m · 27,6m · 32,9m · 39,2m · 33,0m

33.0m
-15.7%

LENGTH OF STAY

4,3 · 3,2 · 3,7 · 3,4 · 3,2

3.2
-6.4%

DAY TRIPS

10,4m · 48,1m · 26,7m · 32,9m · 24,5m
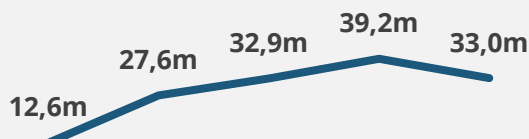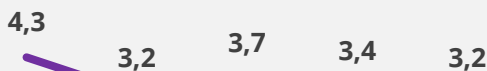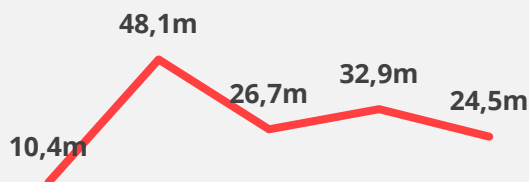
24.5m
-25.5%

Q3 2021 · Q3 2022 · Q3 2023 · Q3 2024 · Q3 2025

South Africa
Inspiring new ways

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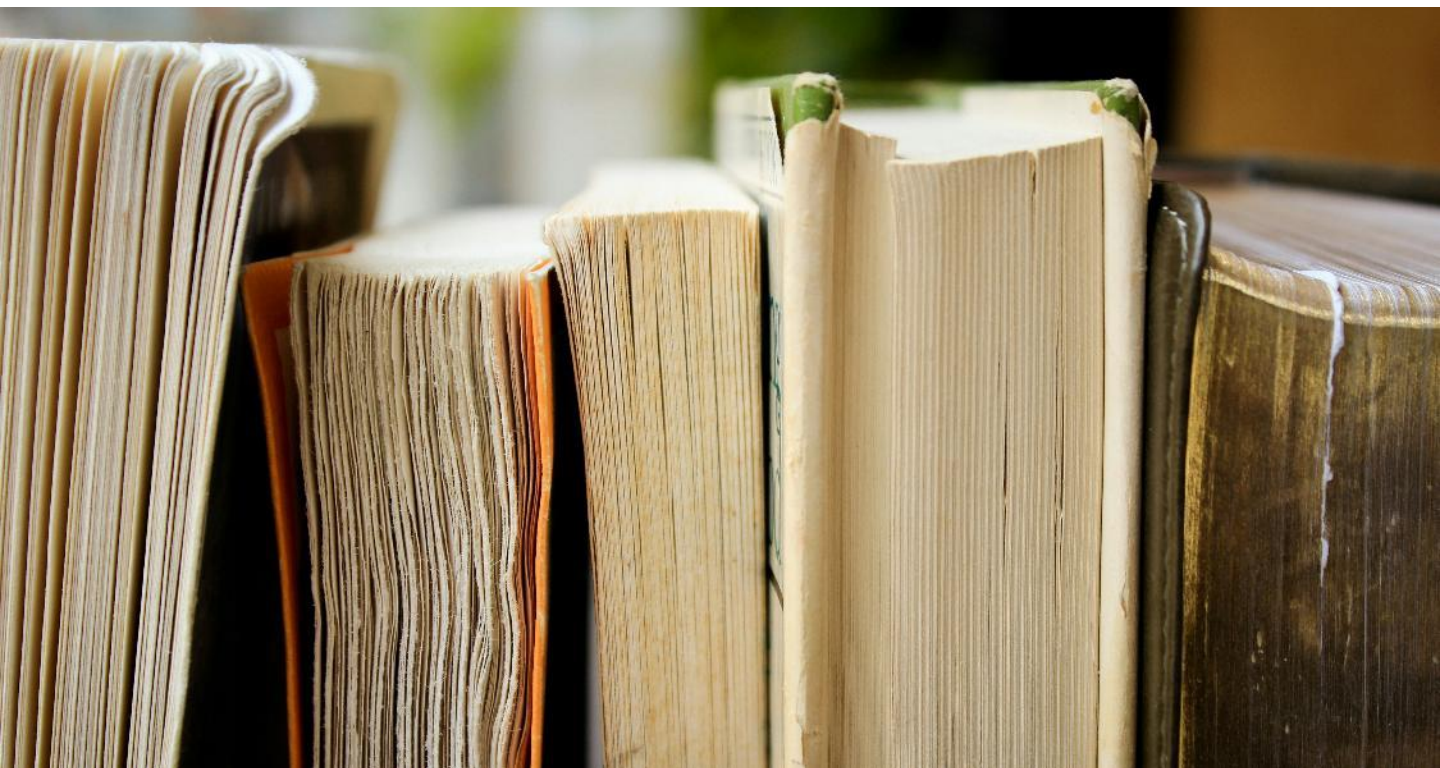
The monthly sample consists of 1,300 adult respondents, and data is collected through face-to-face interviews conducted in the respondent's home.

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. https://www.statssa.gov.za/?p=18832 | Economic wrap-up for September 2025

2. Statistical Release P0441: Consumer Price Index. September 2025. Statistics South Africa.

3. Statistical Release P0211 : Quarterly Labour Force Survey (QLFS) – Q3: 2025, Statistics South Africa.

4. https://www.resbank.co.za/content/dam/sarb/publications/statements/monetary-policy-statements/2025/july/july-mpc-statement.pdf

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

7. https://www.limpopomirror.co.za/articles/news/63201/2025-10-09/our-regionas-bad-roads-are-chasing-away-the-tourists

8. https://limpopo.da.org.za/2025/04/infrastructure-collapse-threatens-mapungubwes-economy

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.

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SECTION 3
DOMESTIC OVERNIGHT TRIPS

OVERNIGHT TRIPS

10.4m -10.0%

Domestic overnight travel has shown a decline for the first time since Q3 2021, following very strong growth in Q3 2022. This marks the first downturn in four years, suggesting a softening in travel demand after sustained post-pandemic recovery.

Overnight trips declined by -10.0%, falling from 11.5-million in Q3 2024 to 10.4-million in Q3 2025.

OVERNIGHT TRIPS: Q3 2021 – Q3 2025

Chart data:
- Q3 2021: 2,9m, -50,4%
- Q3 2022: 8,7m, +198,8%
- Q3 2023: 9,0m, +3,9%
- Q3 2024: 11,5m, +27,8%
- Q3 2025: 10,4m, -10,0%

--- OVERNIGHT TRIPS   --- % GROWTH YOY
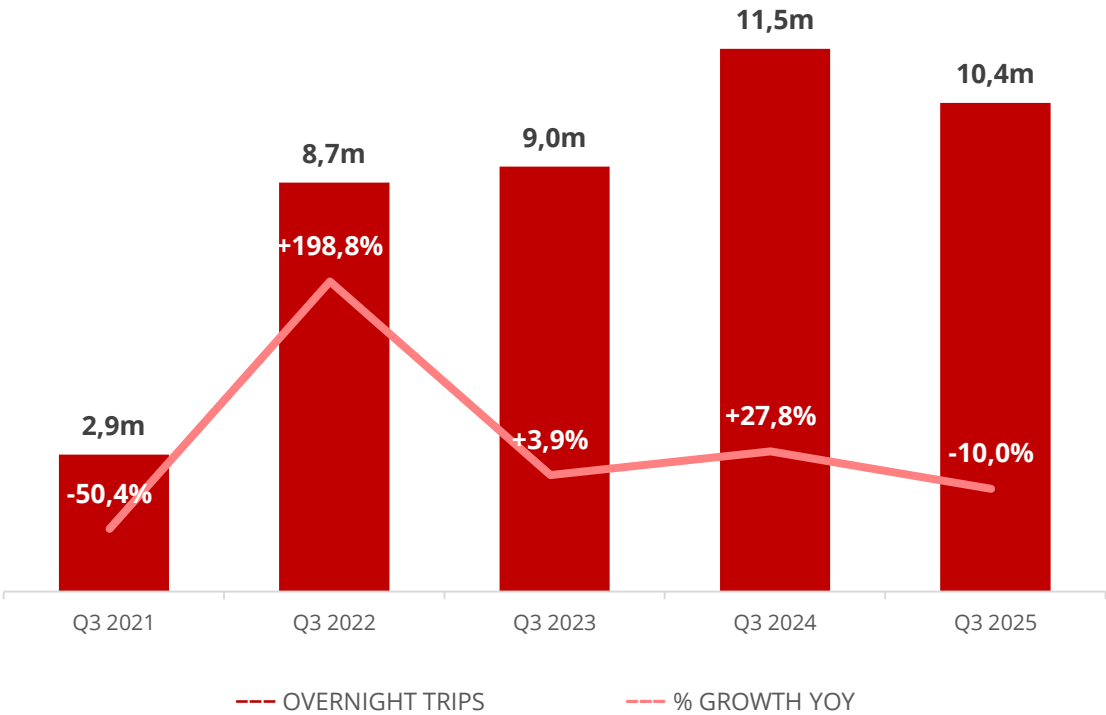
VFR trips continued to grow, with their share of travel increasing from 39.4% to 52.9% in Q3 2025, surpassing the previous high of 47.1% in Q3 2022. The share of holiday trips experienced a slight decline, from 24.2% to 23.2%.

The share of trips for religious purposes also decreased, falling to 10.5% in Q3 2025.

Trips for business or professional purposes dropped sharply, from 11.5% to 4.2%. MICE travel, however, saw an increase in its share of trips, rising from 1.9% in Q3 2024 to 4.3% in Q3 2025.

SHARE OF OVERNIGHT TRIPS BY PURPOSE: Q3 2022 – Q3 2025
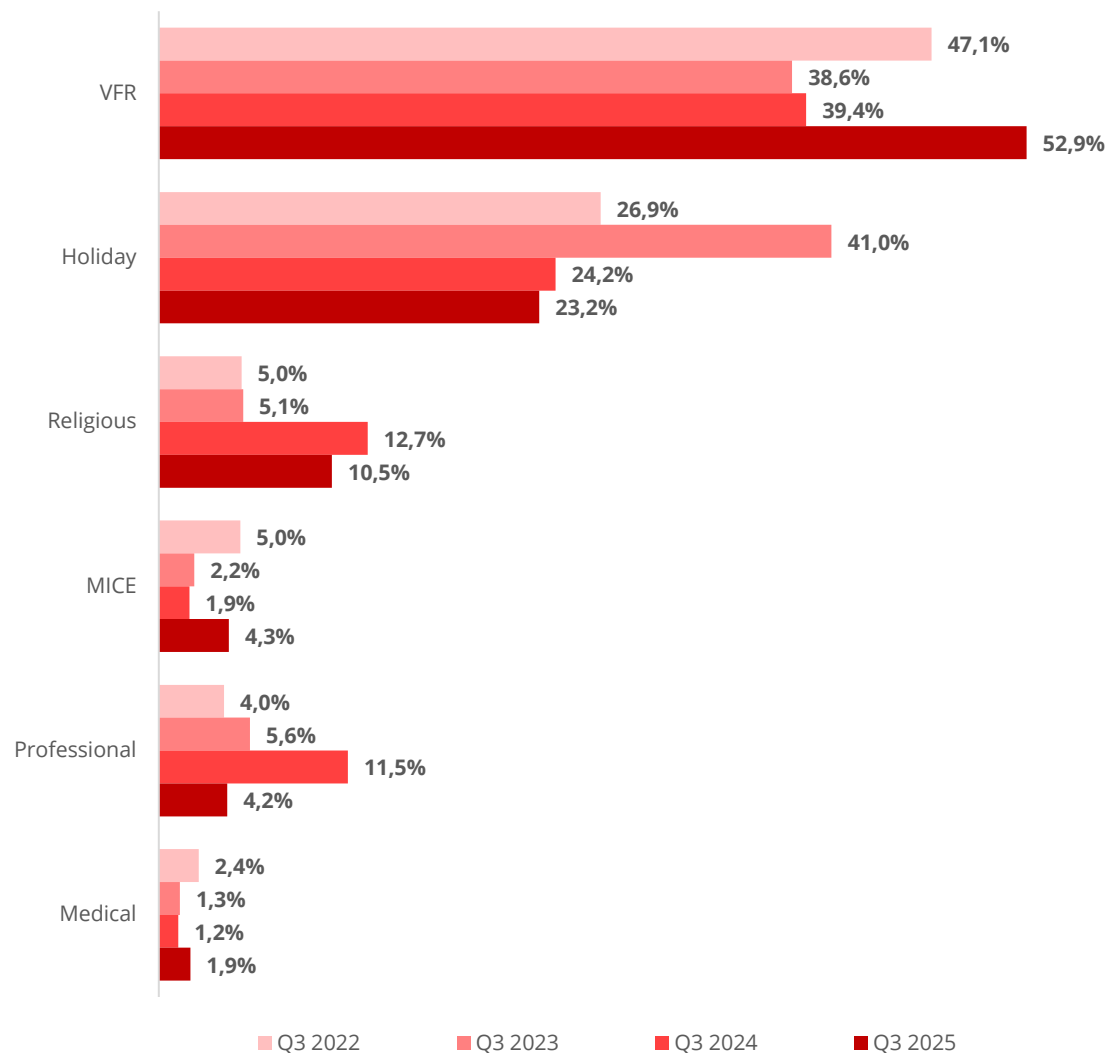
Purpose	Q3 2022	Q3 2023	Q3 2024	Q3 2025
VFR	47,1%	38,6%	39,4%	52,9%
Holiday	26,9%	41,0%	24,2%	23,2%
Religious	5,0%	5,1%	12,7%	10,5%
MICE	5,0%	2,2%	1,9%	4,3%
Professional	4,0%	5,6%	11,5%	4,2%
Medical	2,4%	1,3%	1,2%	1,9%

■ Q3 2022   ■ Q3 2023   ■ Q3 2024   ■ Q3 2025

VFR		HOLIDAY		MICE	
🎒	5.5m +20.7%	🎒	2.4m -13.6%	🎒	443k +106.9%
👛	R 10.8b +8.4%	👛	R 11.1b -14.1%	👛	R 1.8b +28.6%
💵	R 1,978 -10.2%	💵	R 4,598 -0.6%	💵	R 4,163 -37.9%
🛏	18.9m +9.9%	🛏	8.0m -20.2%	🛏	1.7m +128.3%
📅	3.4 -9.0%	📅	3.3 -7.6%	📅	3.9 +10.3%
🥧	52.9% +118.8%	🥧	23.2% -41.2%	🥧	4.3% +129.9%

The VFR category of domestic travel recorded growth in Q3 2025 across total trips, total spend, and bednights.

The number of VFR trips rose by 20.7% to 5.5-million in Q3 2025 compared with 4.5-million in Q3 2024. The VFR share of total trips grew from 24.2% to 52.9% over the same period – a substantial category share gain of +118.8%.

Total VFR spend increased by 8.4% to R 10.8-billion; however, the average spend per trip fell by -10.2%, from R 2,201 to R 1,978.

The total number of VFR bednights grew by +9.9%, from 17.2-million to 18.9-million. The average length of stay shortened from 3.8 nights to 3.4 nights over the same period.

The holiday category performed poorly in Q3 2025, declining across all indicators. The share of total trips fell from 39.4% to 23.2% in Q3 2025, reflecting a significant share drop of -41.2%.

Total holiday trips decreased by -13.6% to 2.4-million, while bednights fell from 10.1-million to 8.0-million. Length of stay dropped to an average 3.3 nights.

Total holiday trip spend contracted by -14.1% in Q3 2025, dropping to R11.1-billion.

The continued growth in VFR since Q1 2025, with sharp declines in holiday travel, suggests that travel demand has shifted categories. The shorter trips across both VFR and holiday reflect time and budget pressures.

The MICE category improved in Q3 2025, accounting for 4.3% of total domestic trips.

The number of MICE trips increased to 443,000 (+106.9%). bednights grew by 128.3% to 1.7-million, and the length of stay rose from 3.5 nights to 3.9 nights.

Total spending increased to R 1.8-billion (+28.6%), but average spend per trip fell by -37.9%, from R 6,701 per trip to R 4,163.

MICE remains the most cyclical segment, with a decline in its share of total travel in Q1 and Q2 of 2025. The increases in trips, bednights, and stays are positive indicators of a potential revival of multi-day meetings and conferences, signalling a cautious return to in-person events.
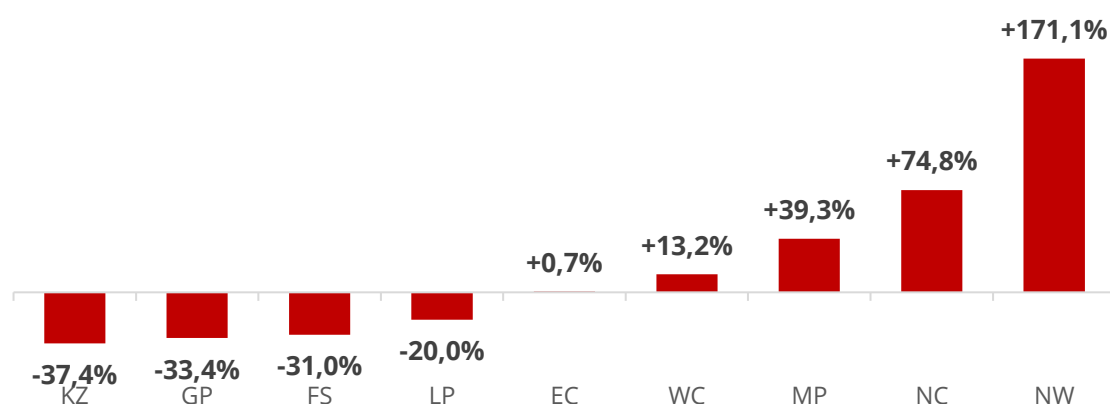
The overall picture for Q3 2025 is bleak, as it shows that the growth in travel is taking strain with a -10.0% drop in total overnight trips. Only the North West, the Northern Cape (off a small base) and Mpumalanga had substantive growth rates as main destination provinces in Q3 2025.

The North West (+171.1%) recorded the highest growth, followed by the Northern Cape (+74.8%) and Mpumalanga (+39.3%). The Western Cape and the Eastern Cape had moderate growth. KwaZulu-Natal (-37.4%), Gauteng (-33.4%) and the Free State (-31.0%) suffered significant drops in growth rates, while the decline for Limpopo was lower at -20.0%.
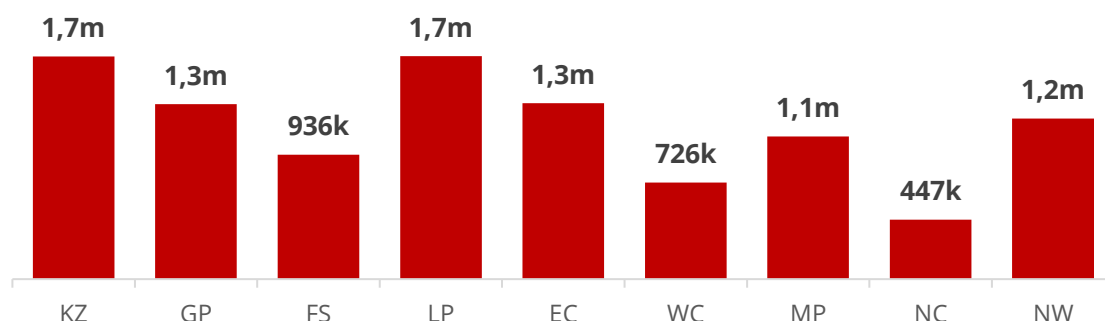
The North West grew from 445k trips to 1.2-million trips, and Mpumalanga from 770k to 1.1-million trips. The Eastern Cape remained steady at 1.3-million trips. KwaZulu-Natal experienced a huge drop from 2.7-million trips to 1.7-million trips. Gauteng dropped to 1.3-million trips, the Free State dipped under a-million trips (936k), and Limpopo dropped to 1.7-million trips.

KwaZulu-Natal, Limpopo and Gauteng remained the top three main destination provinces.

DESTINATION PROVINCE GROWTH RATE: Q3 2024 v Q3 2025

	KZ	GP	FS	LP	EC	WC	MP	NC	NW
Growth	-37,4%	-33,4%	-31,0%	-20,0%	+0,7%	+13,2%	+39,3%	+74,8%	+171,1%

TRIPS TO DESTINATION PROVINCE: Q3 2025

KZ	GP	FS	LP	EC	WC	MP	NC	NW
1,7m	1,3m	936k	1,7m	1,3m	726k	1,1m	447k	1,2m

TRIPS TO DESTINATION PROVINCE: Q3 2023 – Q3 2025

|	KZ	GP	FS	LP	EC	WC	MP	NC	NW
Q3 2023	1.3m	1.7m	698k	1.0m	1.4m	1.3m	694k	526k	402k
Q3 2024	2.7m	2.0m	1.4m	2.1m	1.3m	641k	770k	256k	445k
Q3 2025	1.7m	1.3m	936k	1.7m	1.3m	726k	1.1m	447k	1.2m

OVERNIGHT TRIPS

10.4m -10.0%

In Q3 2025, four provinces experienced growth as source provinces: Mpumalanga, the Western Cape, the North West and the Northern Cape.

Mpumalanga (+155.4%), the Western Cape (+135.7%) and the North West (+92.4%) recorded significant growth in Q3 2025 compared to Q3 2024. The North West has shown an upward trend since Q3 2023, increasing to 1.1-million trips in Q3 2025.

Limpopo declined by 42.0%, from 2.0-million to 1.2-million trips. Similarly, KwaZulu-Natal declined by 32.9%, dropping from 2.0-million to 1.3-million trips. The Free State (-40.6%), the Eastern Cape (-30.8%) and Gauteng (-12.3%) also reported declines in overnight trips in Q3 2025.

Gauteng, with 2.6-million overnight trips, has consistently remained the major source province for overnight travel for the past three years (Q3 2023 to Q3 2025), followed by KwaZulu-Natal (1.3-million), Limpopo (1.2-million) and the North West (1.1-million).

SOURCE PROVINCE GROWTH RATE: Q3 2024 v Q3 2025
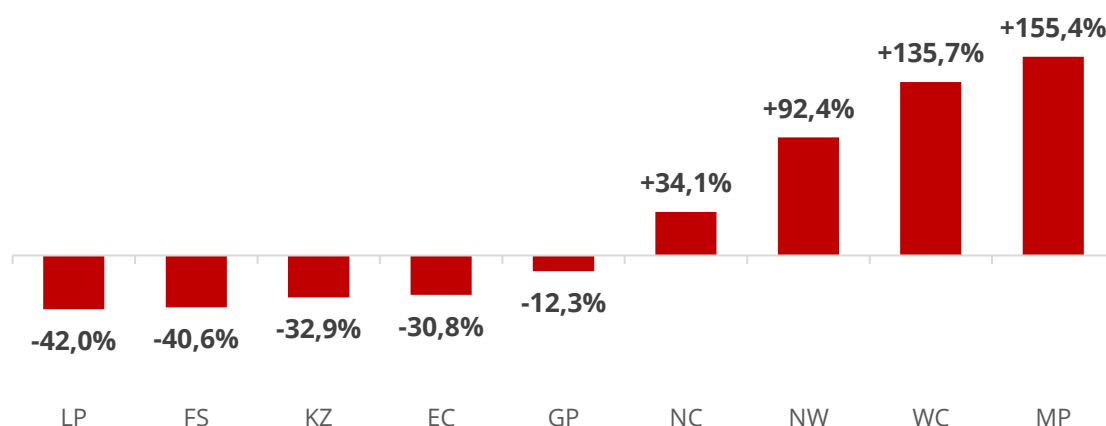
TRIPS FROM SOURCE PROVINCE: Q3 2025
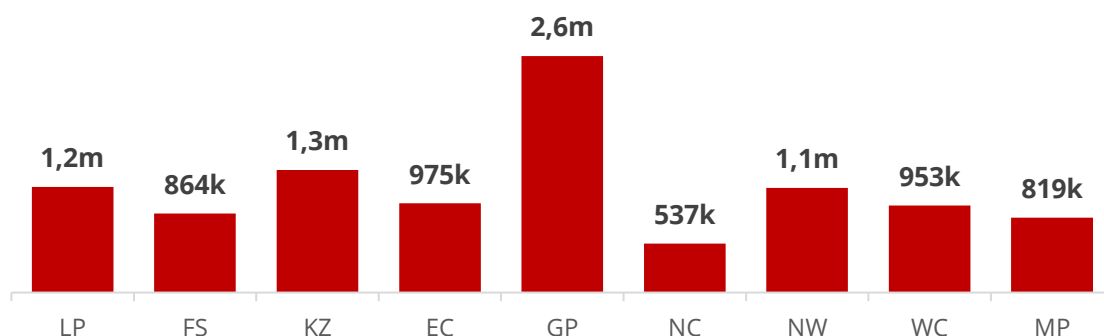
TRIPS FROM SOURCE PROVINCE: Q3 2023 – Q3 2025

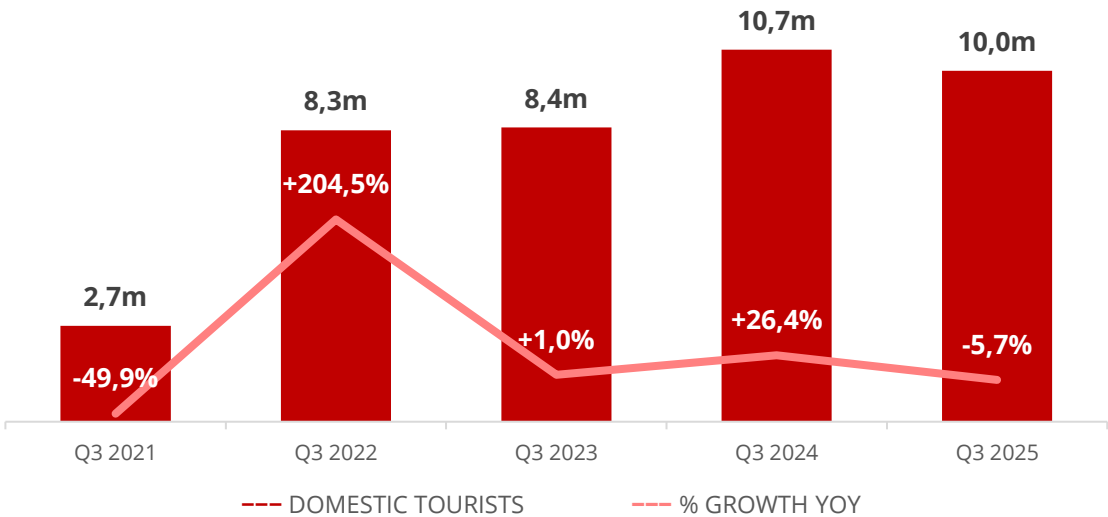|	LP	FS	KZ	EC	GP	NC	NW	WC	MP
Q3 2023	996k	650k	1.1m	855k	2.6m	746k	521k	1.2m	380k
Q3 2024	2.0m	1.5m	2.0m	1.4m	3.0m	400k	595k	405k	321k
Q3 2025	1.2m	864k	1.3m	975k	2.6m	537k	1.1m	953k	819k

In the third quarter of 2025, the number of domestic tourists declined to 10.0-million, representing a 5.7% decrease compared to Q3 2024. Over the same period, the total number of domestic trips fell by 10%, dropping to 10.4-million.
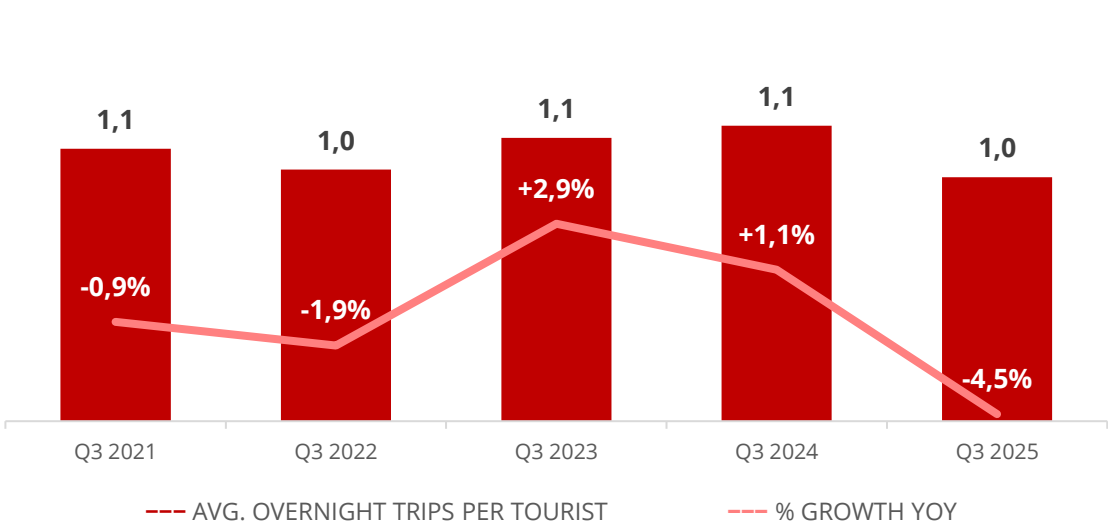
The average number of trips per tourist remained steady at 1.0, consistent with previous years. This indicates that the decline in overall travel activity is being driven primarily by fewer people travelling, rather than existing travellers taking fewer trips. The sharper decline in the total number of trips supports this, as it mirrors the reduction in traveller volumes rather than a behavioural shift in trip-taking frequency.

The broader implication is that a decline in the number of people undertaking domestic overnight travel will inevitably constrain the growth of domestic overnight tourism.

DOMESTIC TOURISTS: Q3 2021 – Q3 2025

	Q3 2021	Q3 2022	Q3 2023	Q3 2024	Q3 2025
DOMESTIC TOURISTS	2,7m	8,3m	8,4m	10,7m	10,0m
% GROWTH YOY	-49,9%	+204,5%	+1,0%	+26,4%	-5,7%

--- DOMESTIC TOURISTS   --- % GROWTH YOY

AVG. OVERNIGHT TRIPS PER TOURIST: Q3 2021 – Q3 2025

	Q3 2021	Q3 2022	Q3 2023	Q3 2024	Q3 2025
AVG. OVERNIGHT TRIPS PER TOURIST	1,1	1,0	1,1	1,1	1,0
% GROWTH YOY	-0,9%	-1,9%	+2,9%	+1,1%	-4,5%

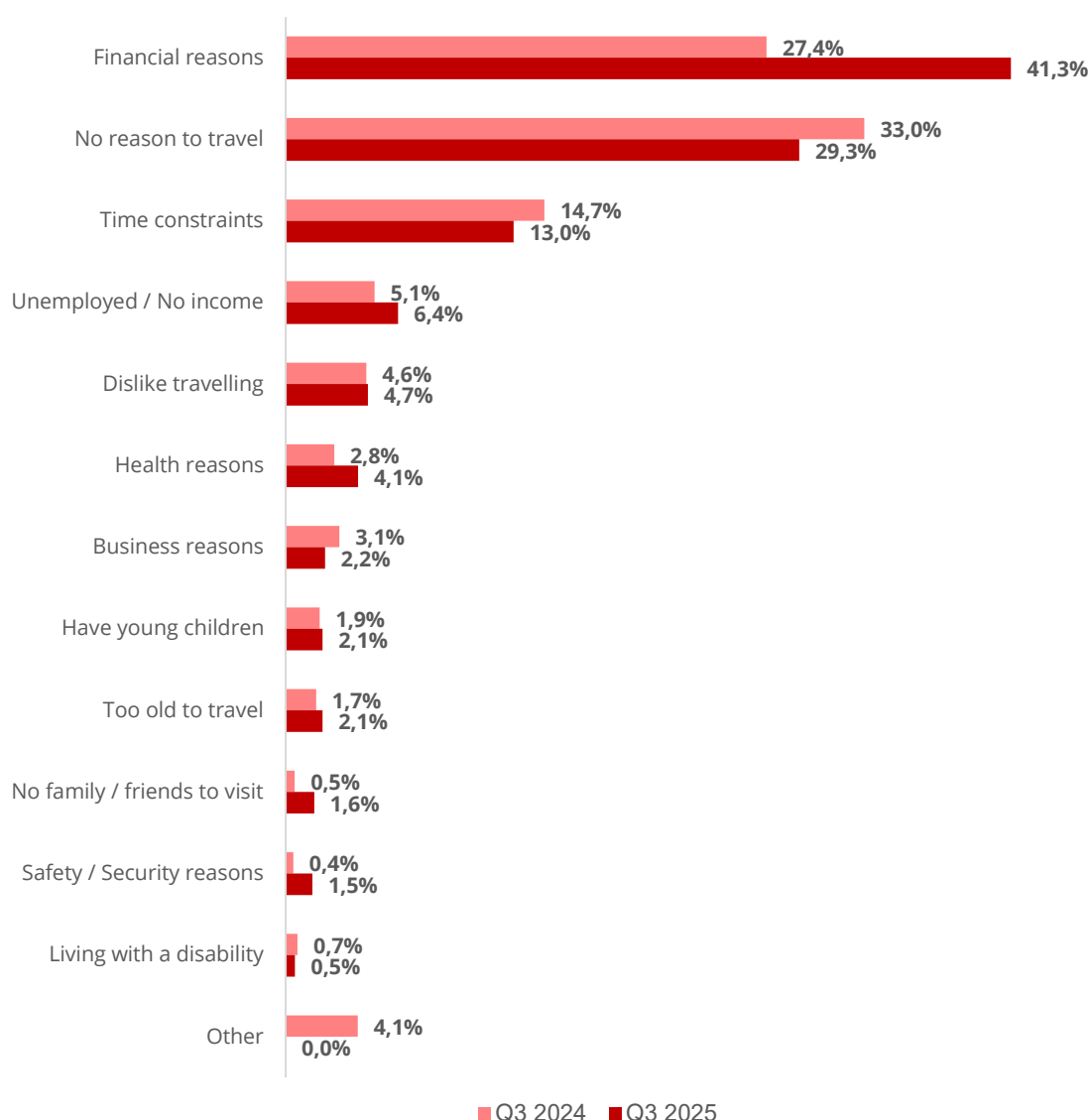--- AVG. OVERNIGHT TRIPS PER TOURIST   --- % GROWTH YOY

In Q3 2025, the three main reasons for not travelling, financial reasons, no reason to travel, and time constraints, remained broadly consistent with previous year-on-year trends.

However, *financial reasons* rose sharply by 13.9 percentage points, from 27.4% to 41.3%. *No reason to travel* fell from 33.0% to 29.3%, while *time constraints* decreased from 14.7% to 13.0%. *Being unemployed or having no income* increased from 5.1% to 6.4%.

These shifts suggest that economic pressures are increasingly affecting travel decisions, with financial constraints becoming a major barrier to domestic travel.

REASONS FOR NOT TRAVELLING: Q3 2024 v Q3 2025

Reason	Q3 2024	Q3 2025
Financial reasons	27,4%	41,3%
No reason to travel	33,0%	29,3%
Time constraints	14,7%	13,0%
Unemployed / No income	5,1%	6,4%
Dislike travelling	4,6%	4,7%
Health reasons	2,8%	4,1%
Business reasons	3,1%	2,2%
Have young children	1,9%	2,1%
Too old to travel	1,7%	2,1%
No family / friends to visit	0,5%	1,6%
Safety / Security reasons	0,4%	1,5%
Living with a disability	0,7%	0,5%
Other	4,1%	0,0%

■ Q3 2024 ■ Q3 2025

Domestic overnight spending declined by -14.9% in Q3 2025, from R33.3-billion to R28.4-billion, compared to Q3 2024. In Q3 2025, spending by holidaymakers and VFR accounted for 72.2% of total domestic spending.

Holiday spend declined by -14.1%, while VFR spend grew by +8.4%. Holiday spend fell from R12.9-billion to R11.1-billion, but its share in Q3 2025 increased slightly to 39.0%. VFR spend increased from R10.0-billion to R10.8-billion, with its share rising from 30.0% to 38.2% over the same period. Religious tourism experienced a rise of +29.0%, increasing from R1.4-billion to R1.8-billion, with its share of spend rising to 6.2%. Spending on trips for professional purposes declined by -61.3%, dropping to R1.9-billion in Q3 2025, while MICE spend grew by +28.6% to reach R1.8-billion.

Holiday travel remains an important segment, while VFR has proven to be resilient, or even counter-cyclical, during economic pressures. Religious tourism growth highlights opportunities for specialised tourism experiences. Providers and destinations could target niche markets that are less sensitive to economic downturns especially in this post-pandemic period. MICE trips and their associated spending have the potential to grow with focussed strategies.

DOMESTIC SPEND: Q3 2021 – Q3 2025
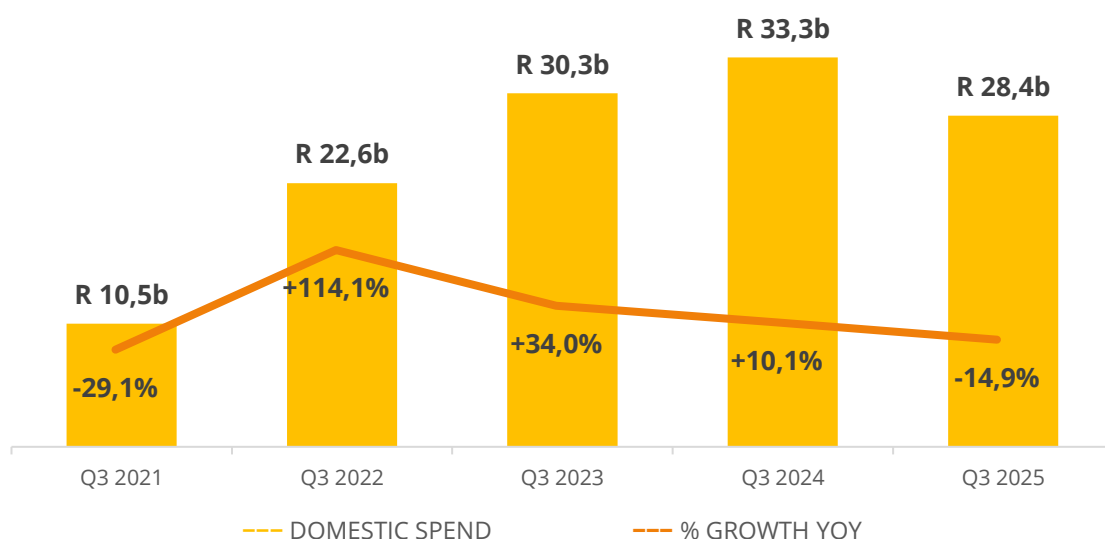
DOMESTIC SPEND BY PURPOSE: Q3 2024 v Q3 2025

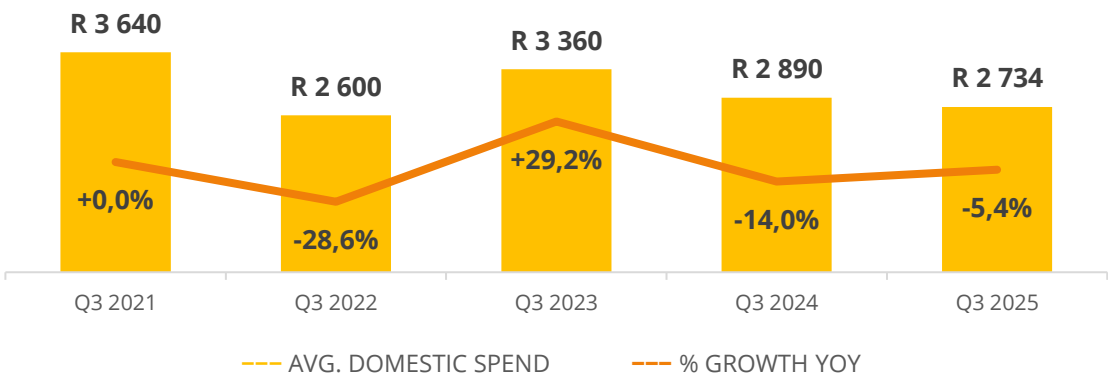|	Q3 2024	Q3 2025	% 2024	% 2025
Holiday	R 12.9b	R 11.1b	38.6%	39.0%
VFR	R 10.0b	R 10.8b	30.0%	38.2%
Professional	R 4.8b	R 1.9b	14.4%	6.5%
MICE	R 1.4b	R 1.8b	4.3%	6.5%
Religious	R 1.4b	R 1.8b	4.1%	6.2%

In Q3 2025, the average domestic spend per trip decreased by -5.4%, dropping from R2,890 in Q3 2024 to R2,734.

Although total VFR spend grew by +8.4% in Q3 2025, average spend per trip declined by -10.1%, falling from R2,200 in Q3 2024 to R1,978 in Q3 2025. Holiday average spend recorded a slight decrease to R4,598 (-0.1%). MICE average spend per trip experienced a significant drop of -37.9%, declining from R6,700 to R4,163.
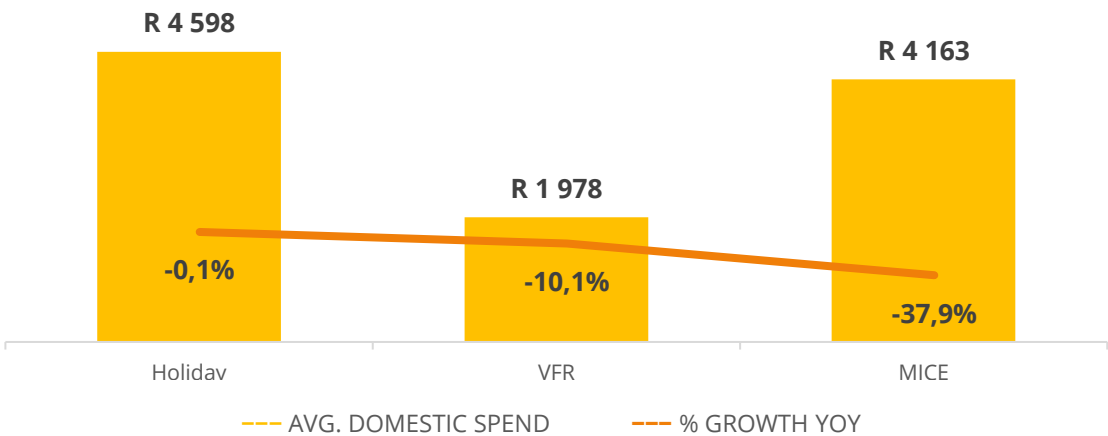
The overall decline in average domestic spend per trip indicates that travellers are tightening their budgets, reflecting increased financial pressure and reduced discretionary spending.

The increase in total VFR spend comes from more VFR travellers, not from greater per-trip expenditure. The sharp decline in total holiday spend (combined with a nearly unchanged average spend) strongly suggests that fewer people are taking holiday trips, rather than holidaymakers cutting their budgets. MICE spending can still grow, although at lower spend levels per trip.

AVERAGE DOMESTIC SPEND: Q3 2021 – Q3 2025

	Q3 2021	Q3 2022	Q3 2023	Q3 2024	Q3 2025
AVG. DOMESTIC SPEND	R 3 640	R 2 600	R 3 360	R 2 890	R 2 734
% GROWTH YOY	+0,0%	-28,6%	+29,2%	-14,0%	-5,4%

--- AVG. DOMESTIC SPEND   --- % GROWTH YOY

AVERAGE DOMESTIC SPEND BY PURPOSE: Q3 2025

	Holiday	VFR	MICE
AVG. DOMESTIC SPEND	R 4 598	R 1 978	R 4 163
% GROWTH YOY	-0,1%	-10,1%	-37,9%

--- AVG. DOMESTIC SPEND   --- % GROWTH YOY

DOMESTIC SPEND R 28.4b -14.9%

In Q3 2025, personal shopping and leisure & entertainment spending recorded strong growth compared to Q3 2024. Personal shopping spend rose 36.7%, from R1.6-billion to R4.8-billion, while leisure & entertainment spend increased +83.3% to R1.4-billion, continuing the upward trend.

Accommodation spend also grew sharply by +81.0%, from R3.2-billion to R5.7-billion. In contrast, food & beverage spending declined by -35.9%, falling from R10.1-billion to R6.5-billion.

Transport expenditure was reclassified in Q2 2025 into **transport** (plane, bus, and long-distance taxi fares) and **vehicle** (fuel and servicing costs). Under this classification, transport spend was R4.4-billion and vehicle spend R3.6-billion, totalling R8.0-billion in Q3 2025, indicating a significant decline in overall transport-related spending.

The Q3 2025 spending patterns indicate a shift in consumer priorities. Discretionary categories such as personal shopping, leisure & entertainment, and accommodation showed strong growth, suggesting that travellers are willing to spend more on experiences and lifestyle activities. The sharp drop in overall transport-related expenditure highlights that fewer people are travelling long distances, even as those who do travel allocate more to accommodation and leisure.

DOMESTIC SPEND BY CATEGORY: Q3 2024 v Q3 2025

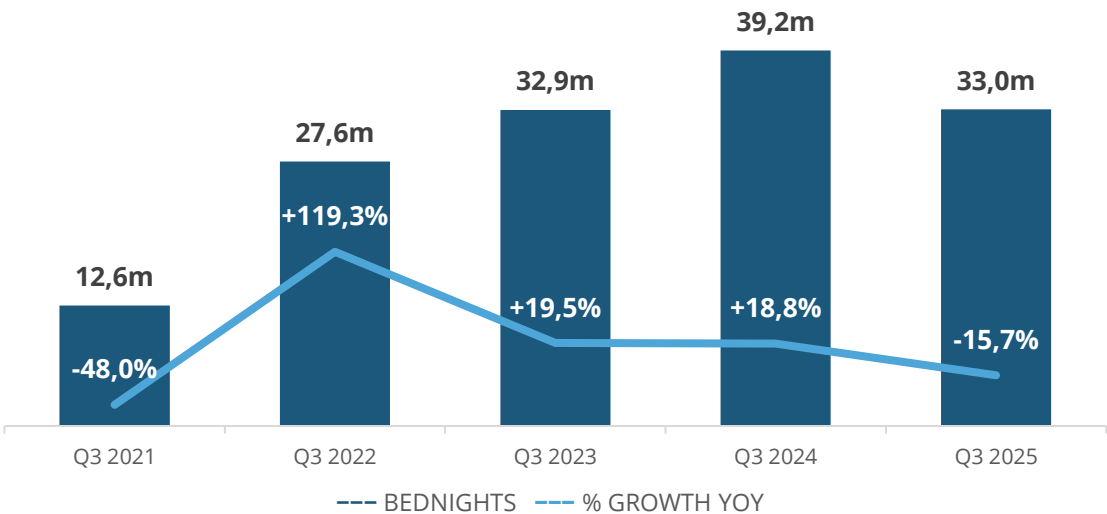|	Q3 2024	Q3 2025	
FOOD & BEVERAGES	R 10.1b	R 6.5b	-35.9%
ACCOMMODATION	R 3.2b	R 5.7b	+81.0%
SHOPPING	R 4.2b	R 5.7b	+36.7%
TRANSPORT	R 13.1b	R 4.4b	-66.6%
VEHICLE	R -	R 3.6b	- %
LEISURE & ENTERTAINMENT	R 716.9m	R 1.3b	+83.3%

In Q3 2025, domestic bednights declined by -15.7%, dropping from 39.2-million to 33.0-million compared to Q3 2024.
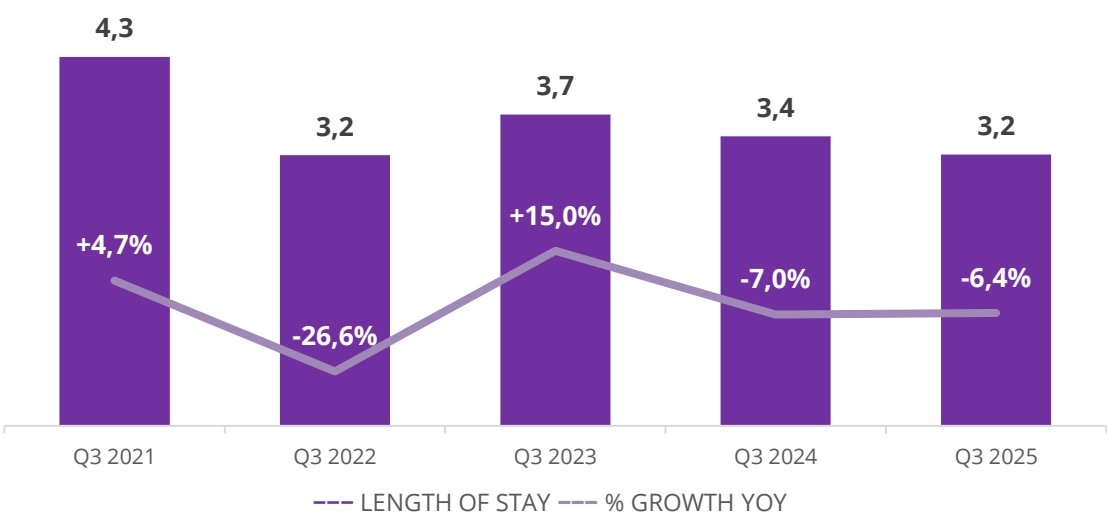
The average length of stay also saw a decline of -6.4%, decreasing from an average of 3.4 nights to 3.2 nights over the same period.

This combination of overnight trips down by -10.0%, bednights down by -15.7%, and length of stay down by -6.4% indicates that fewer people took domestic overnight trips in Q3 2025 and that those who did, spent less time at their destinations.

DOMESTIC BEDNIGHTS: Q3 2021 – Q3 2025

	Q3 2021	Q3 2022	Q3 2023	Q3 2024	Q3 2025
Bednights	12,6m	27,6m	32,9m	39,2m	33,0m
% Growth YoY	-48,0%	+119,3%	+19,5%	+18,8%	-15,7%

--- BEDNIGHTS --- % GROWTH YOY

DOMESTIC LENGTH OF STAY: Q3 2021 – Q3 2025

	Q3 2021	Q3 2022	Q3 2023	Q3 2024	Q3 2025
Length of Stay	4,3	3,2	3,7	3,4	3,2
% Growth YoY	+4,7%	-26,6%	+15,0%	-7,0%	-6,4%

--- LENGTH OF STAY --- % GROWTH YOY

SECTION 4
PROVINCIAL PERFORMANCE

PROVINCIAL PERFORMANCE

KwaZulu-Natal emerged as the **leading main destination province**, recording the highest number of overnight trips at 1.7-million in Q3 2025 (-37.4%). It also reported the highest total spend at R4.8-billion (-36.4%) and the third-highest number of bednights at 4.8-million (-30.7%).

The **Eastern Cape** was the second best-performing main destination province, recording 1.3-million trips. It had the second-highest total spend at R4.4-billion (-10.2%) and an average spend per trip of R 3,294. It also recorded the most bednights at 6.7-million (+6.3%) and the longest average stay at 5.1 nights (+5.6%).

Limpopo, the **North West**, and **Gauteng** ranked closely together as the next best-performing provinces in Q3 2025.

Although overnight trips declined by -20.0%, **Limpopo** still recorded 1.7-million trips. Total spend dropped to R3.8-billion (-33.0%), and bednights reached 5.0-million (-30.3%).

Overnight trips to **North West** rose by +171.1% to 1.2-million. Total spend grew by +422.9% from R701.2-million to R3.7-billion, and average spend increased by +92.9% to R3,038 per trip. For **Gauteng**, overnight trips declined to 1.3-million, and total spend fell to R3.5-billion (-32.3%), although average spend grew by 1.7% to R 2,658 per trip.

OVERNIGHT TRIP PERFORMANCE INDICATORS BY DESTINATION PROVINCE: Q3 2025

	TRIPS	SPEND	AVG SPEND	BEDNIGHTS	LOS
EC	1.3m	R 4.4b	R 3,294	6.7m	5.1
FS	936k	R 1.8b	R 1,951	2.4m	2.5
GP	1.3m	R 3.5b	R 2,658	3.7m	2.8
KZ	1.7m	R 4.8b	R 2,885	4.8m	2.9
LP	1.7m	R 3.8b	R 2,286	5.0m	3.0
MP	1.1m	R 2.9b	R 2,704	3.0m	2.8
NC	447k	R 1.2b	R 2,773	1.3m	3.0
NW	1.2m	R 3.7b	R 3,038	3.8m	3.2
WC	726k	R 2.2b	R 3,065	2.3m	3.2

PROVINCIAL PERFORMANCE

Mpumalanga saw an increase in overnight trips, reaching 1.1-million (+39.3%), and total spend increased by 25.2% to R2.9-billion.

The **Western Cape** experienced several setbacks: total spend dropped to R2.2-billion (-39.7%); average spend fell by 46.8%, from R 5,760 to R 3,065; bednights declined to 3.2-million (-42.7%); and the average length of stay decreased by -49.4%, from 6.2 to 3.2 nights.

KwaZulu-Natal and **Limpopo** are the most visited provinces, reflecting strong overall tourism demand. **KwaZulu-Natal** stands out for generating the greatest total expenditure, making it the strongest economic performer in the domestic tourism market.

The **Eastern Cape** records the highest number of bednights, indicating longer visitor stays and a strong appeal for extended visits.

The **North West** and the **Western Cape** both benefit from higher per-trip spending, suggesting they attract higher-value travellers or offer more premium tourism experiences. These provinces also draw visitors who tend to stay longer per trip.

However, despite these pockets of strong performance, most provinces are showing signs of strain, with declines in either total trips, total spend, or length of stay. This indicates a domestic tourism environment that is facing pressure in several regions.

OVERNIGHT TRIP PERFORMANCE INDICATORS BY DESTINATION PROVINCE: Q3 2025

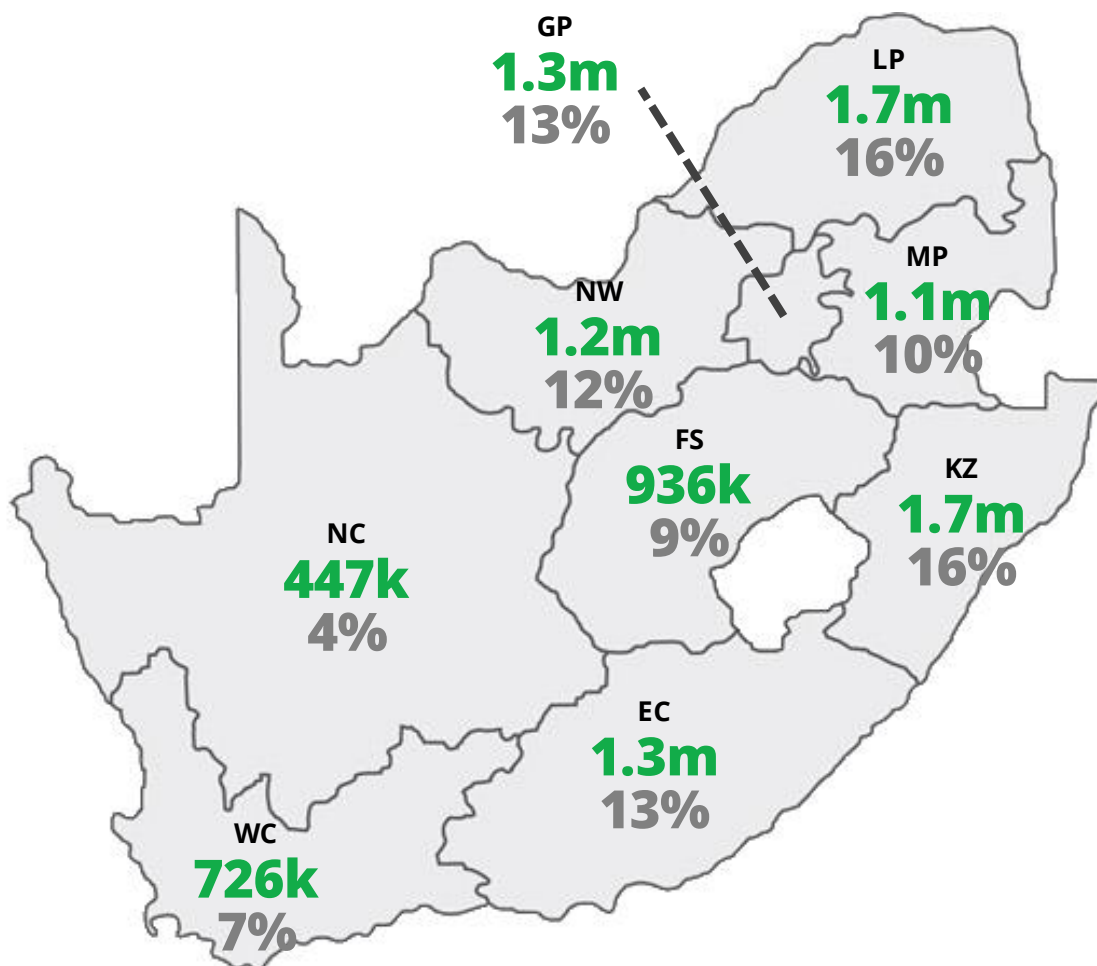|	TRIPS	SPEND	AVG SPEND	BEDNIGHTS	LOS
EC	1.3m	R 4.4b	R 3,294	6.7m	5.1
FS	936k	R 1.8b	R 1,951	2.4m	2.5
GP	1.3m	R 3.5b	R 2,658	3.7m	2.8
KZ	1.7m	R 4.8b	R 2,885	4.8m	2.9
LP	1.7m	R 3.8b	R 2,286	5.0m	3.0
MP	1.1m	R 2.9b	R 2,704	3.0m	2.8
NC	447k	R 1.2b	R 2,773	1.3m	3.0
NW	1.2m	R 3.7b	R 3,038	3.8m	3.2
WC	726k	R 2.2b	R 3,065	2.3m	3.2

PROVINCIAL PERFORMANCE

In Q3 2025, the total number of overnight trips across South Africa's nine provinces was 10.4-million.

The top four provinces visited as main destinations accounted for 58% (6.0-million) of all overnight trips. KwaZulu-Natal (16%) and Limpopo (16%), each with 1.7-million overnight trips, emerged as the leading main destination provinces, followed by the Eastern Cape (13%) and Gauteng (13%), each with 1.3-million trips.

The North West and Mpumalanga each recorded over 1-million overnight trips.

The Northern Cape was **the least visited province** as a main destination, with 447k (4%) overnight trips, followed by the Free State with 936k (9%) and the Western Cape with 726k (7%).

OVERNIGHT TRIPS BY DESTINATION PROVINCE: Q3 2025

GP
1.3m
13%

LP
1.7m
16%

MP
1.1m
10%

NW
1.2m
12%

FS
936k
9%

KZ
1.7m
16%

NC
447k
4%

EC
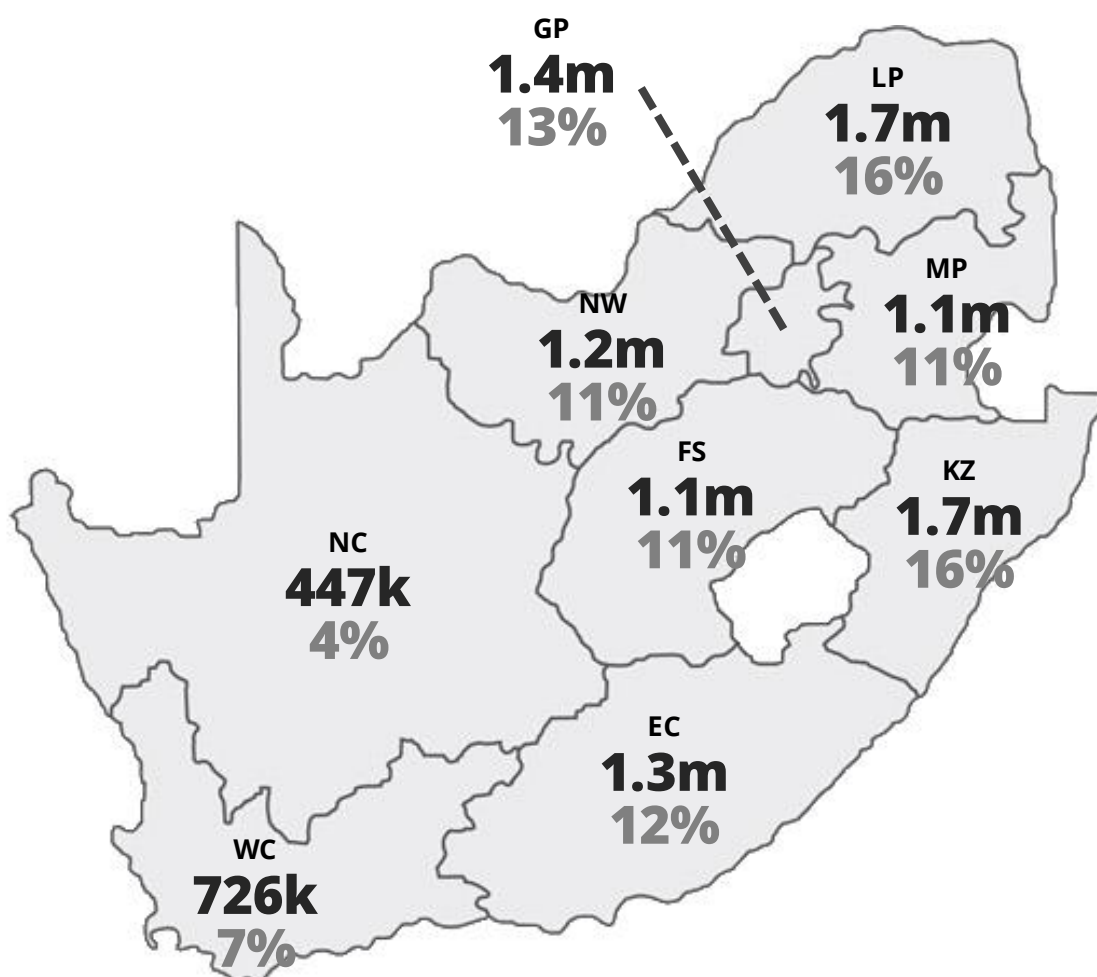**1.3m**
13%

WC
726k
7%

PROVINCES VISITED DURING STOPOVERS

In Q3 2025, the total number of overnight trips across South Africa's nine provinces was 10.4-million.

When including provinces visited during stopovers, with some form of economic activity, en route to the main destination, the total rises to 10.7-million visits.

Only two provinces recorded one-million or more visits that that included economically active stopovers, overnight stays, and main destination trips: Gauteng with 1.4-million (13%) and the Free State with 1.1-million (11%). Together, these two provinces accounted for 24% (2.5-million) of all visits. The remaining seven provinces did not record any stopover visits in Q3 2025.

PROVINCES VISITED: Q3 2025

GP
1.4m
13%

LP
1.7m
16%

MP
1.1m
11%

NW
1.2m
11%

FS
1.1m
11%

KZ
1.7m
16%

NC
447k
4%

EC
1.3m
12%

WC
726k
7%

INTRA- AND INTER-PROVINCE TRAVEL

In Q3 2025, the highest proportions of domestic trips taken by residents within their own provinces were recorded in the Western Cape (69.9%), the Free State (65.6%) and KwaZulu-Natal (63.2%).

Moderate levels of intra-provincial travel were observed in the North West (59.2%), Limpopo (55.1%) and the Northern Cape (49.0%).

Gauteng has the lowest proportion of intra-provincial travel (36.7%), highlighting its role primarily as a source province, contributing to domestic tourism flows elsewhere.

The largest proportions of trips from Gauteng went to Mpumalanga (35.1%), the Free State (31.1%), and the North West (30.4%). Gauteng also accounted for notable shares of trips to Limpopo (25.0%), the Eastern Cape (22.0%), and KwaZulu-Natal (19.2%).

Conversely, trips into Gauteng were largely driven by residents of Mpumalanga (16.0%), KwaZulu-Natal (14.9%), and the North West (14.9%).

Combined inflows from the North West (33.2%), the Western Cape (12.2%) and Gauteng (5.6%) accounted for 51.0% of domestic trips into the Northern Cape.

Similarly, combined inflows from the Eastern Cape (12.2%), Limpopo (8.9%), the Northern Cape (3.9%), and Gauteng (1.9%) accounted for 30.1% of domestic trips into the Western Cape.

INTRA- AND INTER-PROVINCE TRAVEL: Q3 2025
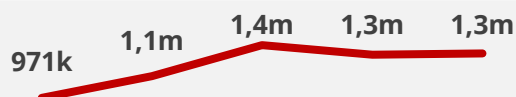Proportion of Trips to Destination Province

DESTINATION PROVINCE

	EC	FS	GT	KZ	LM	MP	NC	NW	WC
EC	47.5%	0.0%	2.2%	6.4%	7.3%	0.0%	0.0%	0.0%	12.2%
FS	2.4%	65.6%	4.4%	0.0%	2.5%	7.7%	0.0%	3.1%	0.0%
GT	22.0%	31.1%	36.7%	19.2%	25.0%	35.1%	5.6%	30.4%	1.9%
KZ	3.8%	0.0%	14.9%	63.2%	0.0%	0.0%	0.0%	1.0%	3.2%
LM	0.0%	0.0%	2.6%	0.0%	55.1%	12.4%	0.0%	0.0%	8.9%
MP	0.0%	0.0%	16.0%	6.2%	2.4%	43.3%	0.0%	0.0%	0.0%
NC	1.2%	3.4%	4.7%	2.3%	3.9%	0.0%	49.0%	6.3%	3.9%
NW	0.0%	0.0%	14.9%	1.0%	3.1%	1.5%	33.2%	59.2%	0.0%
WC	23.0%	0.0%	3.5%	1.8%	0.6%	0.0%	12.2%	0.0%	69.9%

SOURCE PROVINCE

DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS

971k   1,1m   1,4m   1,3m   1,3m

1.3m
+0.7%

OVERNIGHT SPEND

R 2,2b   R 2,1b   R 5,2b   R 4,8b   R 4,4b

R 4.4b
-10.2%

AVERAGE OVERNIGHT SPEND

R 2 252   R 1 828   R 3 754   R 3 691   R 3 294

R 3,294
-10.8%

BEDNIGHTS

2,5m   3,6m   5,0m   6,3m   6,7m
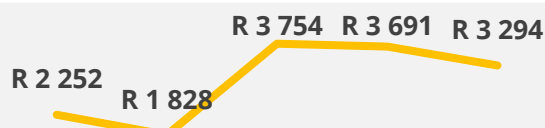
6.7m
+6.3%

LENGTH OF STAY

2,6   3,2   3,6   4,8   5,1
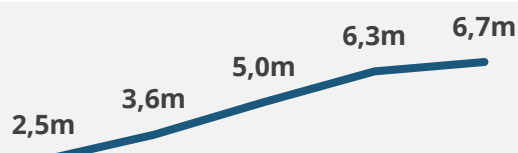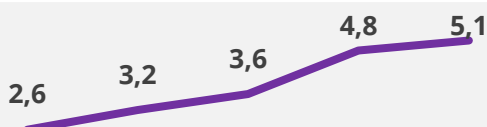
5.1
+5.6%

Q3 2021   Q3 2022   Q3 2023   Q3 2024   Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

EASTERN CAPE

1.3m +0.7%

DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	242k	27.0%	+7.4%
VFR	935k	70.7%	+29.5%
PROFESSIONAL / BUSINESS	-	- %	-100.0%
MICE	40k	3.1%	- %
MEDICAL	-	- %	- %
RELIGIOUS	58k	4.4%	+166.0%

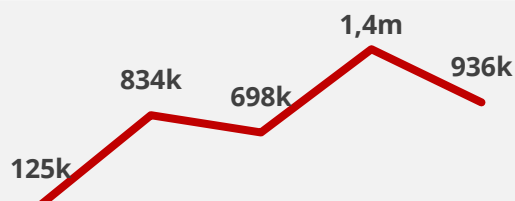| OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.7b	39.4%	+16.0%
VFR	R 2.2b	50.5%	-6.4%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R 65.4m	1.5%	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 178.8m	4.1%	+132.9%

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.
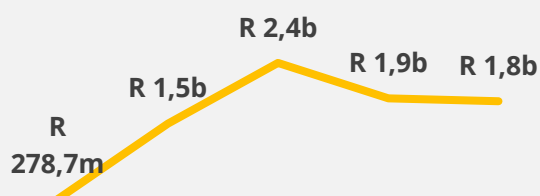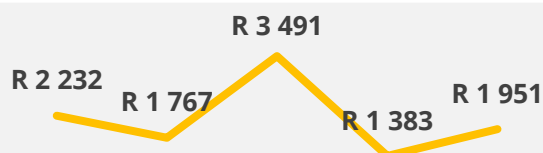
DESTINATION PROVINCE: FREE STATE

OVERNIGHT TRIPS

125k · 834k · 698k · 1,4m · 936k

936k
-31.0%

OVERNIGHT SPEND

R 278,7m · R 1,5b · R 2,4b · R 1,9b · R 1,8b

R 1.8b
-2.7%

AVERAGE OVERNIGHT SPEND

R 2 232 · R 1 767 · R 3 491 · R 1 383 · R 1 951

R 1,951
+41.1%

BEDNIGHTS

408k · 2,7m · 2,4m · 3,4m · 2,4m

2.4m
-30.1%

LENGTH OF STAY

3,3 · 3,2 · 3,4 · 2,5 · 2,5
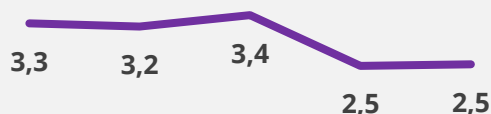
2.5
+1.3%

Q3 2021 · Q3 2022 · Q3 2023 · Q3 2024 · Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.
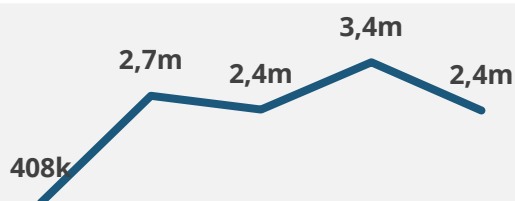
DESTINATION PROVINCE: FREE STATE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	171k	18.3%	+1.4%
VFR	516k	55.1%	-24.3%
PROFESSIONAL / BUSINESS	55k	5.9%	+1.6%
MICE	13k	1.4%	- %
MEDICAL	11k	1.2%	-79.5%
RELIGIOUS	132k	14.1%	-42.1%

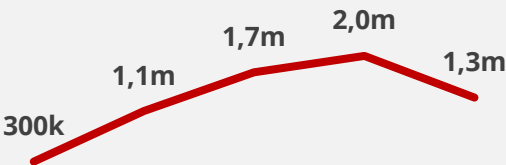| OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 581.1m	31.8%	-19.3%
VFR	R 753.2m	41.2%	+23.1%
PROFESSIONAL / BUSINESS	R 271.6m	14.9%	+133.2%
MICE	R 94.4m	5.2%	- %
MEDICAL	R 7.5m	0.4%	- %
RELIGIOUS	R 55.2m	3.0%	-69.7%

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

GAUTENG

1.3m -33.4%

DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS

300k · 1,1m · 1,7m · 2,0m · 1,3m

1.3m
-33.4%

OVERNIGHT SPEND

R 797,8m · R 3,4b · R 4,8b · R 5,2b · R 3,5b

R 3.5b
-32.3%

AVERAGE OVERNIGHT SPEND

R 2 663 · R 3 106 · R 2 797 · R 2 614 · R 2 658

R 2,658
+1.7%

BEDNIGHTS

1,6m · 4,2m · 5,4m · 6,5m · 3,7m
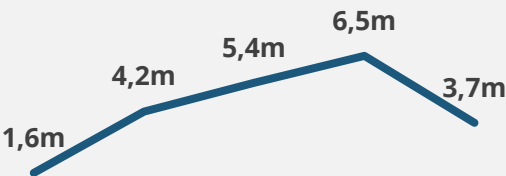
3.7m
-43.5%

LENGTH OF STAY

5,3 · 3,8 · 3,1 · 3,3 · 2,8
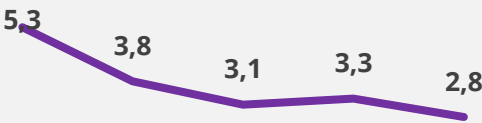
2.8
-15.2%

Q3 2021 · Q3 2022 · Q3 2023 · Q3 2024 · Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.
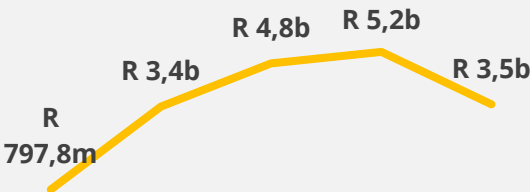
GAUTENG

1.3m -33.4%

DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
🏖 HOLIDAY	259k	19.7%	-56.9%
👥 VFR	803k	61.1%	-17.2%
💼 PROFESSIONAL / BUSINESS	111k	8.4%	+16.2%
🏢 MICE	16k	1.2%	-36.0%
🩺 MEDICAL	29k	2.2%	- %
🙏 RELIGIOUS	70k	5.3%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
🏖 HOLIDAY	R 1.2b	35.4%	-38.2%
👥 VFR	R 1.6b	45.0%	-2.1%
💼 PROFESSIONAL / BUSINESS	R 332.3m	9.5%	-43.1%
🏢 MICE	R 100.4m	2.9%	-55.4%
🩺 MEDICAL	R 14.6m	0.4%	- %
🙏 RELIGIOUS	R 204.9m	5.9%	- %

Key growth and change rates shown in this report are in comparison to 2024.
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DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS

495k — 1,5m — 1,3m — 2,7m — 1,7m

1.7m
-37.4%

OVERNIGHT SPEND

R 2,9b — R 4,9b — R 5,0b — R 7,6b — R 4,8b

R 4.8b
-36.4%

AVERAGE OVERNIGHT SPEND

R 5 769 — R 3 202 — R 3 947 — R 2 843 — R 2 885

R 2,885
+1.5%

BEDNIGHTS

2,3m — 3,4m — 4,9m — 7,0m — 4,8m
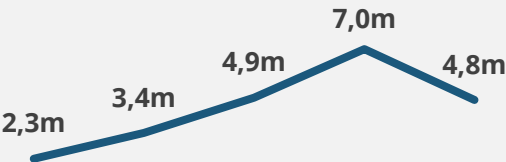
4.8m
-30.7%

LENGTH OF STAY

4,7 — 2,2 — 3,9 — 2,6 — 2,9

2.9
+10.6%

Q3 2021   Q3 2022   Q3 2023   Q3 2024   Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.
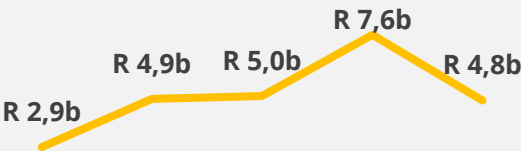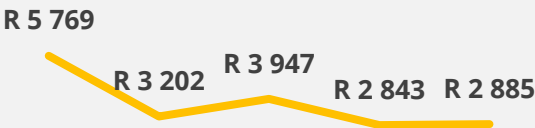
KWAZULU-NATAL

1.7m -37.4%

DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	245k	14.6%	-65.8%
VFR	1.0m	61.4%	+104.3%
PROFESSIONAL / BUSINESS	55k	3.3%	-75.7%
MICE	25k	1.5%	-55.4%
MEDICAL	-	- %	-100.0%
RELIGIOUS	291k	17.4%	+63.7%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.2b	23.8%	-65.9%
VFR	R 2.4b	50.5%	+84.1%
PROFESSIONAL / BUSINESS	R 212.2n	4.4%	-80.0%
MICE	R 382.2n	7.9%	+77.2%
MEDICAL	R -	- %	- %
RELIGIOUS	R 353.9n	7.3%	-53.9%

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LIMPOPO

 1.7m -20.0%

DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS

- 156k
- 1,6m
- 1,0m
- 2,1m
- 1,7m

1.7m
-20.0%

OVERNIGHT SPEND

- R 863,1m
- R 2,3b
- R 3,1b
- R 5,7b
- R 3,8b

R 3.8b
-33.0%

AVERAGE OVERNIGHT SPEND

- R 5 544
- R 1 481
- R 2 931
- R 2 728
- R 2 286

R 2,286
-16.2%

BEDNIGHTS

- 2,2m
- 4,1m
- 4,7m
- 7,1m
- 5,0m

5.0m
-30.3%

LENGTH OF STAY

- 14,2
- 2,6
- 4,5
- 3,4
- 3,0
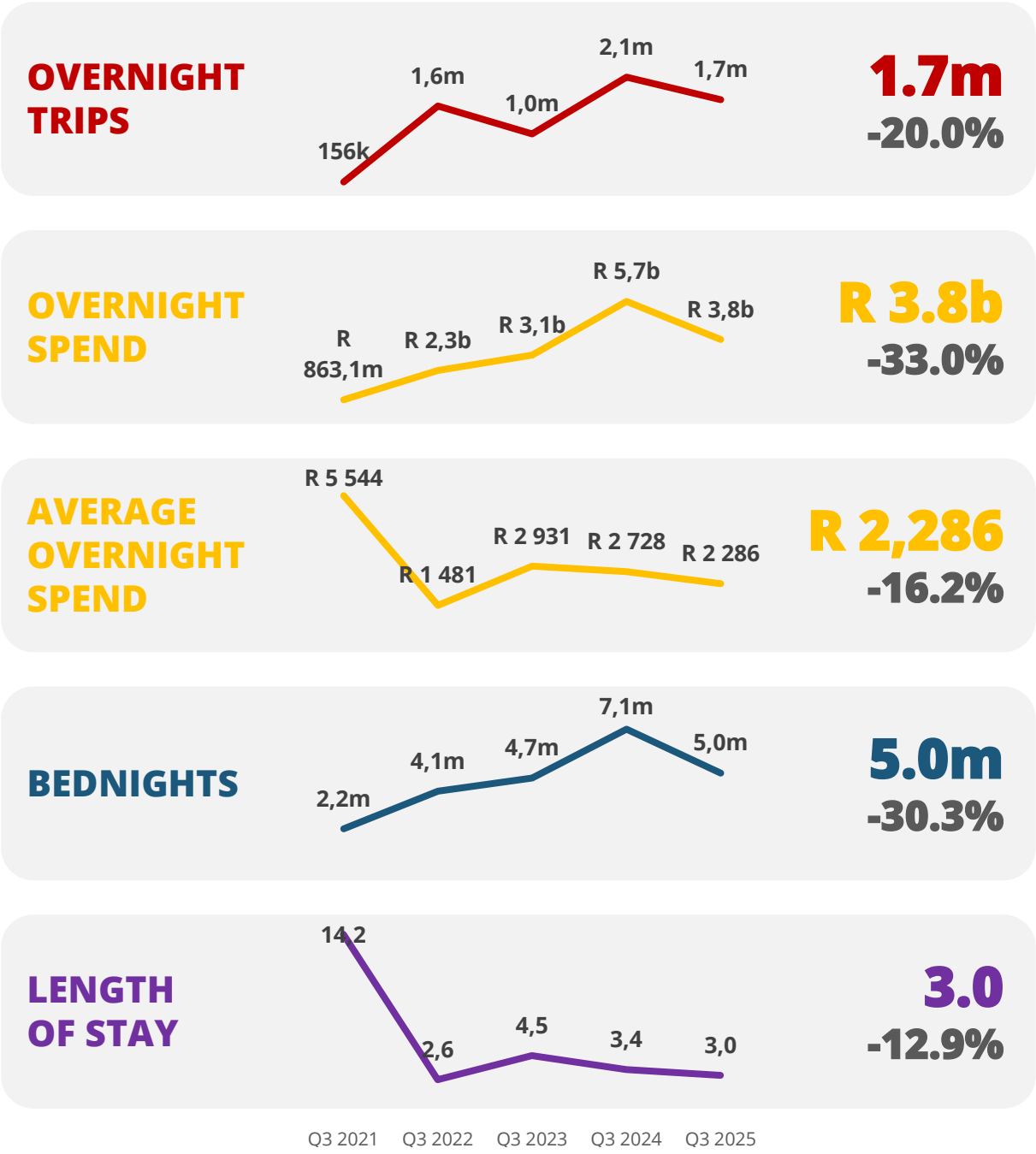
3.0
-12.9%

Q3 2021   Q3 2022   Q3 2023   Q3 2024   Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
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LIMPOPO

1.7m -20.0%

DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	396k	23.6%	-5.5%
VFR	800k	47.7%	-8.2%
PROFESSIONAL / BUSINESS	66k	3.9%	-79.2%
MICE	153k	9.1%	+92.7%
MEDICAL	-	- %	- %
RELIGIOUS	219k	13.1%	-42.6%

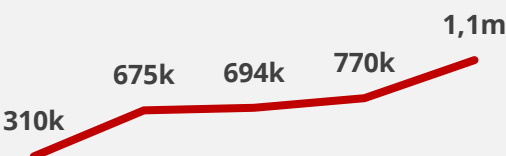| OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.3b	32.6%	-36.9%
VFR	R 1.6b	41.1%	+2.5%
PROFESSIONAL / BUSINESS	R 259.9m	6.8%	-69.0%
MICE	R 474.4m	12.4%	-43.9%
MEDICAL	R -	- %	- %
RELIGIOUS	R 244.2m	6.4%	-20.1%

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DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS

310k · 675k · 694k · 770k · 1,1m

1.1m
+39.3%

OVERNIGHT SPEND

R 823,0m · R 1,2b · R 2,6b · R 2,3b · R 2,9b

R 2.9b
+25.2%

AVERAGE OVERNIGHT SPEND

R 2 657 · R 1 846 · R 3 739 · R 3 009 · R 2 704

R 2,704
-10.1%

BEDNIGHTS

1,5m · 2,9m · 2,9m · 2,9m · 3,0m
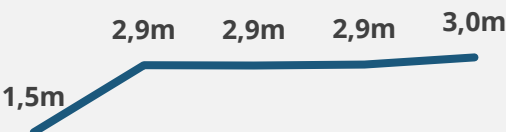
3.0m
+5.2%

LENGTH OF STAY

4,7 · 4,3 · 4,1 · 3,7 · 2,8
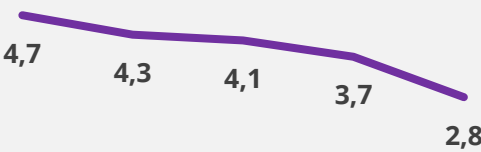
2.8
-24.5%

Q3 2021   Q3 2022   Q3 2023   Q3 2024   Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
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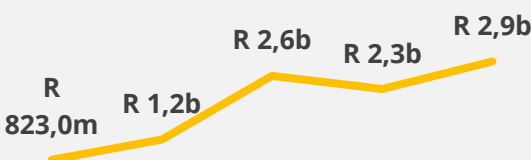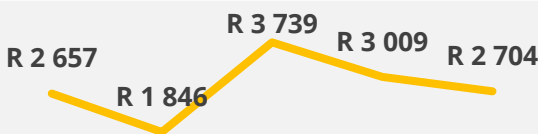
MPUMALANGA

1.1m **+39.3%**

DESTINATION PROVINCE: **MPUMALANGA**

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	415k	38.7%	+28.4%
VFR	325k	30.3%	+39.5%
PROFESSIONAL / BUSINESS	-	- %	-100.0%
MICE	119k	11.1%	+844.3%
MEDICAL	147k	13.7%	- %
RELIGIOUS	28k	2.6%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.9b	66.9%	+116.5%
VFR	R 581.0m	20.0%	-36.9%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R 243.1m	8.4%	+83.8%
MEDICAL	R 73.0m	2.5%	- %
RELIGIOUS	R 39.5m	1.4%	- %

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Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS

126k   128k   526k   256k   447k

447k
+74.8%

OVERNIGHT SPEND

R 442,3m   R 481,0m   R 821,4m   R 1,4b   R 1,2b

R 1.2b
-13.2%

AVERAGE OVERNIGHT SPEND

R 3 504   R 3 761   R 1 563   R 5 586   R 2 773

R 2,773
-50.4%

BEDNIGHTS

272k   236k   1,5m   699k   1,3m
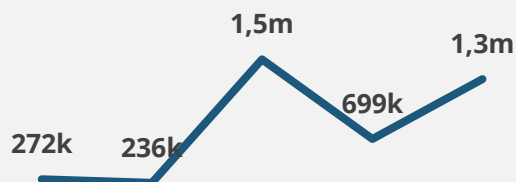
1.3m
+90.4%

LENGTH OF STAY

2,2   1,8   2,9   2,7   3,0
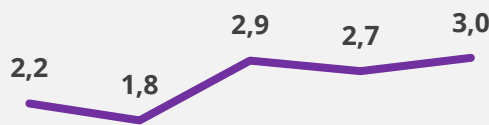
3.0
+8.9%

Q3 2021   Q3 2022   Q3 2023   Q3 2024   Q3 2025

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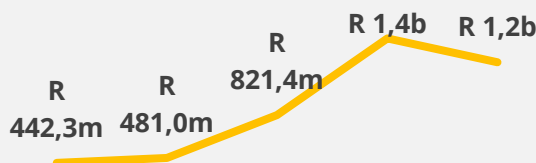
NORTHERN CAPE

447k +74.8%

DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	129k	28.9%	+250.1%
VFR	77k	17.3%	-8.5%
PROFESSIONAL / BUSINESS	47k	10.4%	-55.0%
MICE	-	- %	- %
MEDICAL	-	- %	- %
RELIGIOUS	140k	31.4%	+4299.2%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 439.0m	35.4%	+476.4%
VFR	R 41.2m	3.3%	-94.8%
PROFESSIONAL / BUSINESS	R 485.0m	39.1%	-9.2%
MICE	R -	- %	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 216.6m	17.5%	+1898.6%

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

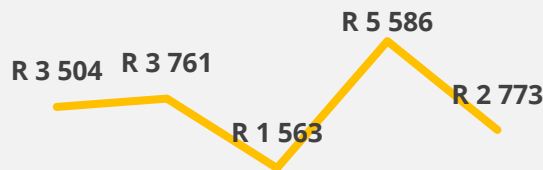**DESTINATION PROVINCE: NORTH WEST**

OVERNIGHT TRIPS

285k • 589k • 402k • 445k • 1,2m

1.2m
+171.1%

OVERNIGHT SPEND

R 857,7m • R 2,4b • R 1,1b • R 701,2m • R 3,7b

R 3.7b
+422.9%

AVERAGE OVERNIGHT SPEND

R 3 006 • R 4 020 • R 2 695 • R 1 575 • R 3 038

R 3,038
+92.9%

BEDNIGHTS

1,4m • 2,7m • 996k • 1,3m • 3,8m
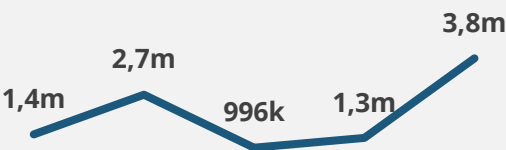
3.8m
+193.1%

LENGTH OF STAY

5,0 • 4,5 • 2,5 • 2,9 • 3,2
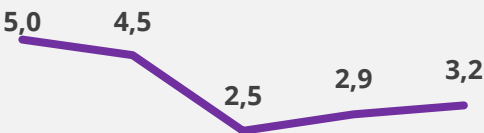
3.2
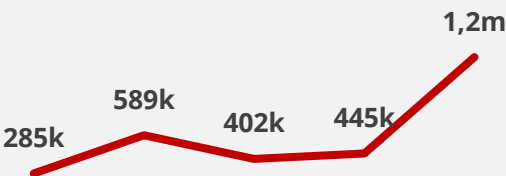**+8.1%**

Q3 2021   Q3 2022   Q3 2023   Q3 2024   Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

NORTH WEST

1.2m +171.1%

DESTINATION PROVINCE: NORTH WEST

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	350k	29.0%	+428.2%
VFR	683k	56.6%	+298.5%
PROFESSIONAL / BUSINESS	-	- %	-100.0%
MICE	41k	3.4%	- %
MEDICAL	-	- %	- %
RELIGIOUS	133k	11.0%	+320.9%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.8b	49.2%	+866.3%
VFR	R 1.0b	28.0%	+1027.4%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R 402.2m	11.0%	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 433.3m	11.8%	+1329.2%

Key growth and change rates shown in this report are in comparison to 2024.
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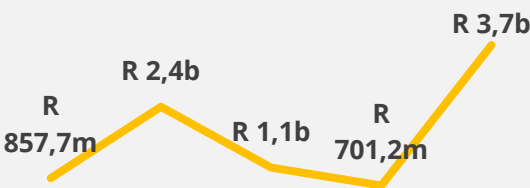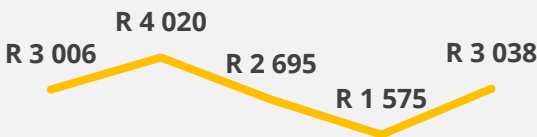
DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS

137k
1,1m
1,3m
641k
726k

726k
+13.2%

OVERNIGHT SPEND

R 1,4b
R 4,3b
R 5,3b
R 3,7b
R 2,2b

R 2.2b
-39.7%

AVERAGE OVERNIGHT SPEND

R 10 533
R 3 834
R 4 097
R 5 760
R 3 065

R 3,065
-46.8%

BEDNIGHTS

351k
3,9m
5,2m
4,0m
2,3m
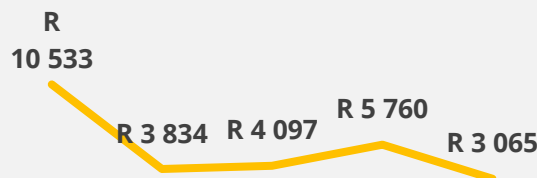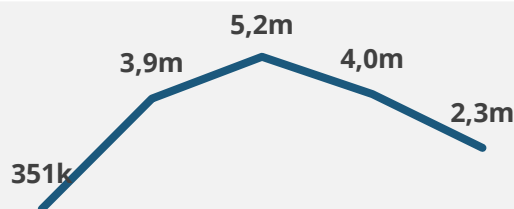
2.3m
-42.7%

LENGTH OF STAY

2,6
3,4
4,0
6,2
3,2
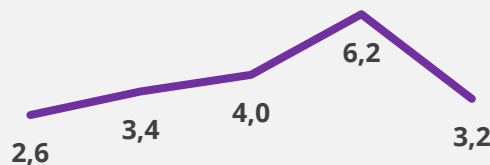
3.2
+49.4%

Q3 2021   Q3 2022   Q3 2023   Q3 2024   Q3 2025

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

WESTERN CAPE 726k +13.2%

DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	196k	27.0%	-13.3%
VFR	316k	43.6%	+3.4%
PROFESSIONAL / BUSINESS	98k	13.5%	+122.4%
MICE	37k	5.1%	-12.0%
MEDICAL	12k	1.7%	- %
RELIGIOUS	23k	3.1%	- %

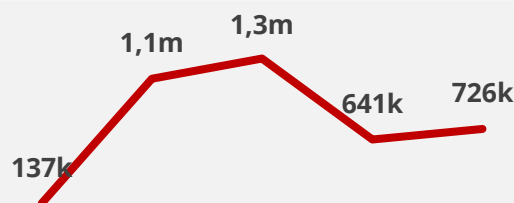| OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 933.7m	42.0%	-56.7%
VFR	R 660.2m	29.7%	-14.8%
PROFESSIONAL / BUSINESS	R 294.7m	13.2%	-58.3%
MICE	R 84.1m	3.8%	+401.6%
MEDICAL	R 42.4m	1.9%	- %
RELIGIOUS	R 45.5m	2.0%	- %

Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.
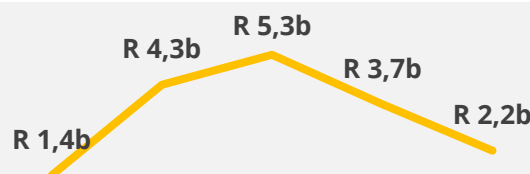
SECTION 5
DOMESTIC DAY TRIPS

DAY TRIPS

24.5m -25.5%

The total number of domestic day trips declined by -25.5%, dropping from 32.9-million in Q3 2024 to 24.5-million in Q3 2025. It also fell below the Q3 2023 level of 26.7-million day trips.

The moderate growth in Q1 2025 (+2.2%, 27.1-million) and Q2 2025 (+7.5%, 29.9-million) indicates that domestic day trips were initially stable. However, the steep decline of 25.5% in Q3 2025 signals a sudden contraction, breaking the growth trend from earlier quarters.

DAY TRIPS: Q3 2021 – Q3 2025

Q3 2021: 10,4m, -67,9%
Q3 2022: 48,1m, +360,7%
Q3 2023: 26,7m, -44,4%
Q3 2024: 32,9m, +22,8%
Q3 2025: 24,5m, -25,5%

--- DAY TRIPS   --- % GROWTH YOY
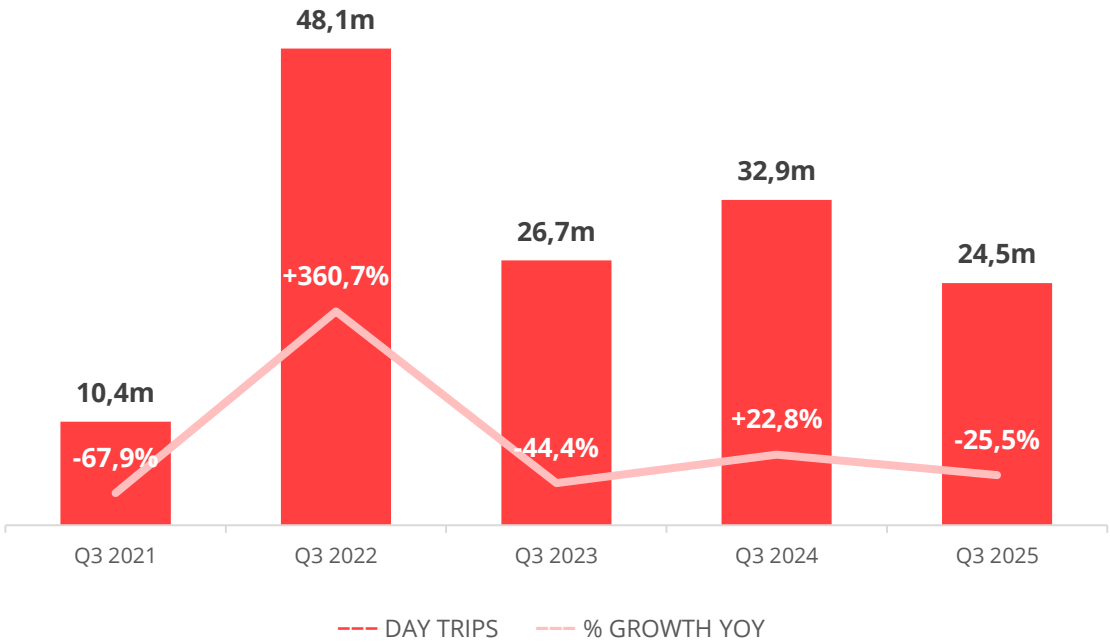
DAY TRIPS

24.5m **-25.5%**

The primary purposes for day trips were visiting friends and relatives (VFR) and holiday trips, followed by trips for personal shopping.

VFR, which accounted for 30.5% of total day trips, declined by 3.6% to 7.5-million trips.

Holiday trips registered moderate growth of 4.8%, reaching 5.7-million trips, with their share of total day trips rising to 23.2%.

Personal shopping experienced a sharp drop of 36.4%, falling to 4.7-million day trips, with its share of total day trips decreasing to 19.2% in Q3 2025.

A sharp decline (38.5%) was also recorded for professional and business day trips, which fell from 3.7-million to 2.3-million during the same period.

DAY TRIPS BY PURPOSE: Q3 2024 v Q3 2025

	Q3 2024	Q3 2025	
VFR	7.7m 23.5%	7.5m 30.5%	-3.6%
HOLIDAY	5.4m 16.5%	5.7m 23.2%	+4.8%
PERSONAL SHOPPING	7.4m 22.5%	4.7m 19.2%	-36.4%
PROFESSIONAL / BUSINESS	3.7m 11.2%	2.3m 9.2%	-38.5%
RELIGIOUS	804k 2.4%	1.4m 5.7%	+73.4%
MICE	978k 3.0%	924k 3.8%	-5.5%

DAY TRIPS

☀ **24.5m** -25.5%

In Q3 2025, the **total number of domestic day trips declined by -25.5% to 24.5-million.**

The largest number of day trips were recorded in Gauteng (6.0-million), KwaZulu-Natal (3.8-million), and Mpumalanga (3.7-million).

Limpopo recorded the steepest decline, dropping -70.6% from 10.3-million day trips to 3-million. Negative growth rates were also observed in the North West (-38.2%), Eastern Cape (-26.8%), Mpumalanga (-23.7%), and KwaZulu-Natal (-13.1%).

In contrast, the Western Cape grew by 53.2% to reach 2.6-million day trips, while the Northern Cape surpassed one-million day trips (1.2-million) with a growth rate of 57.3%.

The Free State (+10.6%) and Gauteng (+0.3%) recorded moderate growth.

SOURCE PROVINCE GROWTH RATE: Q3 2024 v Q3 2025

	LP	NW	EC	MP	KZ	GP	FS	WC	NC
Growth	-70,6%	-38,2%	-26,8%	-23,5%	-13,1%	+0,3%	+10,6%	+53,2%	+57,3%

DAY TRIPS FROM SOURCE PROVINCE: Q3 2024 v Q3 2025

	LP	NW	EC	MP	KZ	GP	FS	WC	NC
Q3 2024	10,3m	2,2m	1,7m	3,5m	4,3m	6,0m	2,3m	1,7m	732k
Q3 2025	3,0m	1,4m	1,2m	2,7m	3,8m	6,0m	2,6m	2,6m	1,2m
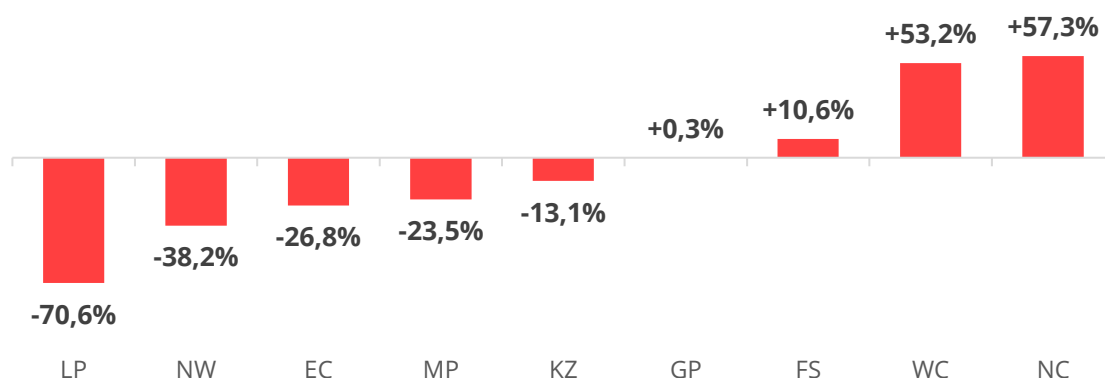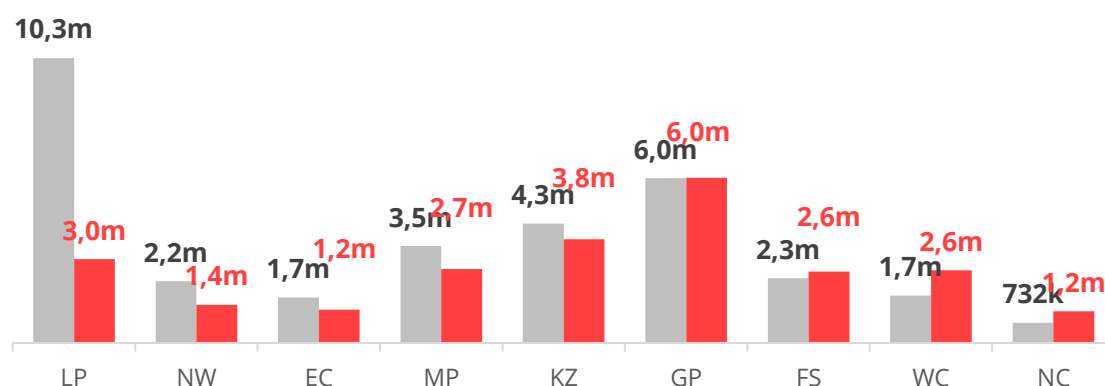
Limpopo, the North West, KwaZulu-Natal, Mpumalanga and the Eastern Cape all experienced declines as destination provinces for day trips in Q3 2025.

Gauteng, with 5.6-million day trips, recorded the highest number of day trips. Despite their declines, KwaZulu-Natal (-15.5%) and Limpopo (-72.4%) recorded the second and third highest number of day trips, 3.6-million and 3.0-million, respectively.

The Western Cape (+45.5%), the Northern Cape (+29.7%), the Free State (+16.2%) and Gauteng (+3.7%) also saw increases in day trips during this quarter, compared to Q3 2024. The Western Cape grew from 1.7-million day trips to 2.5-million.

The Northern Cape has experienced growth in day trips as a destination province in each quarter this year to date: Q1 2025 (+30.0%, 516k trips), Q2 2025 (+23.9%, 1.3-million trips) and Q3 2025 (+29.7%, 1.1-million trips).

Limpopo shows an alarming trend: domestic overnight trips declined by 20.0%, while day trips fell sharply by -72.4% compared to Q3 2024. Poor road infrastructure, particularly the R522 [7] (which connects tourist regions such as Louis Trichardt/Soutpansberg) and R572 [8] (a key route to Mapungubwe), makes travel difficult and unsafe. Furthermore, reports of crime, smuggling, and ecological threats at attractions like Mapungubwe have the potential to damage Limpopo's tourism brand.

DAY TRIPS TO DESTINATION PROVINCE: Q3 2024 v Q3 2025
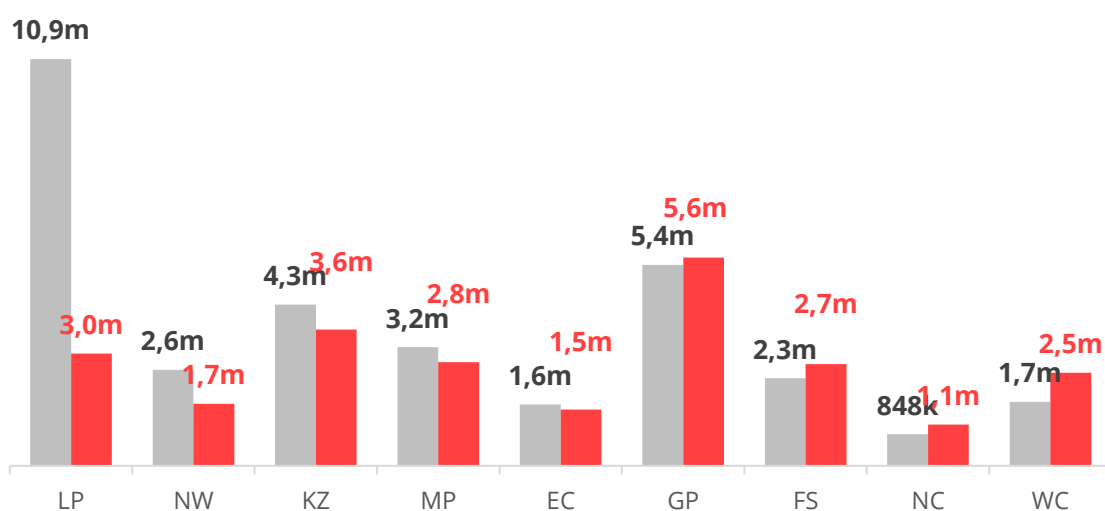
In Q3 2025, **domestic day trip spending declined by -22.3%,** dropping from R36.2-billion in Q3 2024 to R 28.1-billion.

Domestic day trip spend had also declined in Q1 2025 (-7.3%, R30.8-billion) and in Q2 2025 (-7.5%, R 36.9-billion)

DAY TRIP SPEND: Q3 2021 – Q3 2025

Chart data:
- Q3 2021: R 12,4b, +0,0%
- Q3 2022: R 46,7b, +275,5%
- Q3 2023: R 29,1b, -37,5%
- Q3 2024: R 36,2b, +24,2%
- Q3 2025: R 28,1b, -22,3%

--- DAY TRIP SPEND   --- % GROWTH YOY

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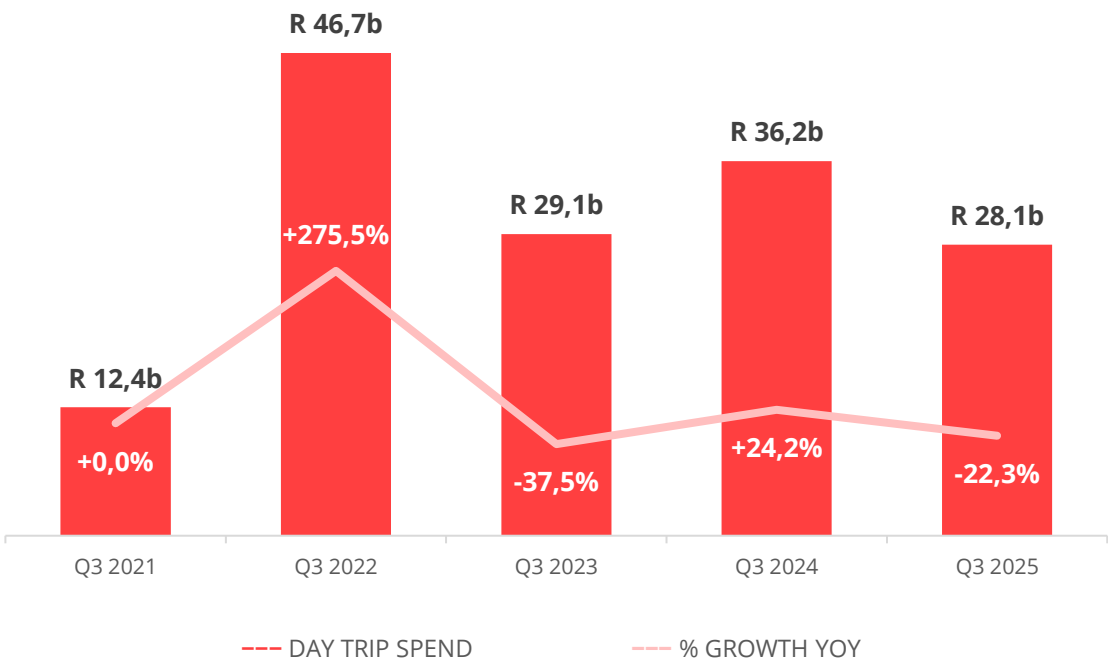
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SECTION 6

THE ECONOMIC CONTEXT

THE ECONOMIC CONTEXT

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

GDP

The latest national GDP estimates paint a positive picture for the second quarter of 2025 (July-September 2025). The economy grew by 0.8%, lifted mainly by manufacturing, mining and trade.[1]

Five other industries also contributed positively. On the downside, construction and transport contracted. Construction recorded its third consecutive quarter of decline. Turnover in the formal-business sector was also positive in the second quarter, growing by 5.1% compared with the first quarter.

INFLATION | 3.4%

South Africa's annual inflation rate grew marginally to 3.4% in September 2025, up from 3,3% in August 2025 - but remained within the Reserve Bank's 3%-6% target range.[2]

UNEMPLOYMENT RATE | 31.9%

South Africa's unemployment rate eased to 31.9% in Q3 2025, the lowest level since Q4 2024, compared to 33.2% in Q2, marking the first decline this year. The youth unemployment rate (ages 15-24) was 58.5% in Q3 2025, down from 62.2% in Q2 2025.[3]

PRIME INTEREST RATE | 7%

The South African Reserve Bank cut its key interest rate by 25 basis points to 7% on 31 July 2025.[4]

PETROL PRICE | R21.55 /litre

Petrol prices declined slightly, as inland prices dropped to R21.55 per litre and coastal prices dropped to R20.72 per litre in September 2025.[5]

HOUSEHOLD DEBT-TO-INCOME | 62.7%

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 Q3 2025.

PROVINCE	QUARTERLY SAMPLE	ACHIEVED SAMPLE	COMPLETION RESPONSE RATE
Eastern Cape (EC)	472	472	100%
Free State (FS)	284	284	100%
Gauteng (GP)	1040	1040	100%
KwaZulu-Natal (KZ)	676	676	100%
Limpopo (LP)	184	184	100%
Mpumalanga (MP)	192	192	100%
North West (NW)	120	120	100%
Northern Cape (NC)	188	188	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 **July, August, and September 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.

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 **2024 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		
		Q3 2023	Q3 2024	Q3 2025
Travel Month	July	35.1%	31.7%	41.3%
	August	33.7%	33.5%	31.4%
	September	31.2%	34.8%	27.3%

SHARE OF OVERNIGHT TRIPS, BY MONTH

		Overnight Trips		
		Q3 2023	Q3 2024	Q3 2025
Travel Month	July	33.5%	32.2%	41.6%
	August	35.3%	33.0%	31.7%
	September	31.2%	34.8%	26.8%

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APPENDIX B
PURPOSE OF TRIP BY
SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY PURPOSE

		Q3 2023			Q3 2024			Q3 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	0.3%	1.2%	0.0%	0.1%	0.0%	0.0%	2.3%	0.0%	0.0%
	Some primary school	0.1%	2.7%	0.0%	5.0%	0.0%	25.8%	1.9%	0.0%	0.0%
	Primary school completed	6.8%	1.0%	0.0%	7.8%	1.8%	0.0%	5.1%	1.1%	0.0%
	Some high school	16.9%	9.7%	3.7%	37.2%	29.5%	12.8%	24.5%	18.6%	0.0%
	High school completed	41.9%	36.1%	0.0%	29.6%	35.4%	45.2%	42.9%	46.8%	17.4%
	Some college	8.4%	5.1%	0.0%	1.9%	0.6%	1.9%	4.8%	4.0%	0.0%
	College completed	3.5%	10.2%	7.1%	4.7%	8.3%	0.0%	4.6%	7.0%	64.5%
	Some university	8.7%	0.6%	0.0%	1.6%	8.4%	0.0%	2.0%	2.5%	3.6%
	Technikon diploma / degree	2.7%	4.7%	71.8%	7.3%	5.3%	0.0%	1.2%	5.0%	5.6%
	University degree / diploma	7.4%	13.0%	17.4%	3.5%	6.7%	0.0%	9.6%	12.8%	8.9%
	Post-graduate degree	3.1%	15.7%	0.0%	1.1%	3.9%	14.3%	1.2%	2.1%	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	45.9%	69.6%	70.0%	50.4%	52.3%	72.7%	50.1%	68.8%	63.0%
	Female	54.1%	30.4%	30.0%	49.6%	47.7%	27.3%	49.9%	31.2%	37.0%
Marital Status	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Single / Never married	68.3%	35.0%	28.2%	49.5%	66.0%	33.4%	64.9%	62.8%	69.3%
	Married / Living together	24.6%	61.8%	63.0%	40.8%	30.5%	53.8%	22.4%	23.0%	25.2%
	Divorced / Widowed / Separated	7.1%	3.2%	8.9%	9.8%	3.5%	12.8%	12.7%	14.2%	5.6%
	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	41.5%	30.3%	28.2%	27.7%	38.9%	21.7%	21.5%	32.7%	33.7%
	Children, dependent	42.0%	51.3%	54.8%	54.1%	40.6%	78.3%	55.7%	36.2%	60.8%
	Children, independent	14.7%	16.4%	17.1%	10.2%	17.5%	0.0%	15.4%	26.6%	5.6%
	Children, dependent + independent	1.8%	2.0%	0.0%	8.1%	3.0%	0.0%	7.4%	4.5%	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	9.2%	1.5%	0.0%	3.6%	10.2%	0.0%	9.6%	6.5%	0.0%
	R501 - R750	4.4%	1.2%	0.0%	4.3%	7.3%	0.0%	7.5%	9.8%	0.0%
	R751 - R1,000	5.0%	4.3%	0.0%	5.5%	0.8%	15.8%	3.9%	1.1%	0.0%
	R1,001 - R1,500	6.1%	3.6%	0.0%	10.8%	3.9%	25.8%	4.5%	0.0%	0.0%
	R1,501 - R2,000	5.8%	2.7%	0.0%	9.1%	5.1%	0.0%	9.7%	2.9%	23.2%
	R2,001 - R3,000	12.5%	2.6%	0.0%	10.1%	8.2%	0.0%	17.2%	8.1%	0.0%
	R3,001 - R5,000	8.5%	6.9%	0.0%	16.8%	9.7%	0.0%	7.5%	8.7%	9.1%
	R5,001 - R7,500	5.5%	7.7%	38.1%	7.3%	12.0%	1.9%	7.3%	4.1%	26.7%
	R7,501 - R10,000	11.6%	13.2%	0.0%	10.8%	4.0%	12.8%	4.6%	16.7%	0.0%
	R10,001 - R15,000	14.8%	6.9%	0.0%	6.9%	7.5%	0.0%	5.9%	2.6%	5.6%
	R15,001 - R20,000	5.4%	11.6%	3.7%	2.3%	9.0%	9.8%	3.7%	11.4%	17.2%
	R20,001 - R30,000	2.0%	4.9%	8.5%	3.4%	11.0%	0.0%	2.3%	2.6%	7.6%
	R30,001+	2.1%	17.7%	28.6%	3.3%	7.9%	14.3%	2.1%	8.1%	0.0%
	Refused to answer	2.1%	8.8%	21.2%	0.9%	3.4%	19.6%	13.8%	15.9%	10.6%
	Don't Know / Uncertain	1.0%	4.2%	0.0%	1.2%	0.0%	0.0%	0.0%	1.6%	0.0%
	No income	3.9%	2.1%	0.0%	3.8%	0.0%	0.0%	0.5%	0.0%	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	32.1%	20.4%	28.2%	13.9%	26.4%	15.8%	11.1%	16.8%	3.6%
	25 - 34	29.8%	14.5%	0.0%	24.0%	25.2%	0.0%	31.2%	39.5%	9.1%
	35 - 44	19.0%	23.3%	50.7%	19.7%	27.0%	23.5%	26.4%	11.5%	63.1%
	45 - 54	5.7%	24.3%	21.2%	21.0%	8.3%	60.7%	10.2%	19.5%	11.3%
	55+	13.4%	17.5%	0.0%	21.3%	13.2%	0.0%	21.0%	12.7%	12.9%

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APPENDIX C

OVERNIGHT TRIPS BY
SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY OVERNIGHT TRIPS

		Overnight Trips		
		Q3 2023	Q3 2024	Q3 2025
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	0.6%	0.5%	1.5%
	Some primary school	1.7%	3.0%	4.2%
	Primary school completed	5.6%	6.6%	3.4%
	Some high school	14.7%	32.6%	23.4%
	High school completed	39.3%	31.4%	40.2%
	Some college	5.9%	3.4%	4.1%
	College completed	5.9%	7.0%	8.2%
	Some university	4.0%	4.0%	2.3%
	Technikon diploma / degree	5.3%	5.6%	2.3%
	University degree / diploma	8.9%	3.6%	9.3%
	Post-graduate degree	8.3%	2.4%	1.1%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	55.7%	49.3%	53.9%
	Female	44.3%	50.7%	46.1%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	52.7%	53.7%	64.9%
	Married / Living together	42.9%	39.3%	21.6%
	Divorced / Widowed / Separated	4.5%	6.9%	13.5%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	31.7%	25.7%	25.6%
	Children, dependent	49.0%	54.8%	50.6%
	Children, independent	17.0%	15.2%	17.9%
	Children, dependent + independent	2.3%	4.3%	5.9%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	5.9%	5.0%	7.6%
	R501 - R750	2.2%	4.5%	7.6%
	R751 - R1,000	4.3%	3.4%	2.7%
	R1,001 - R1,500	4.7%	6.9%	3.9%
	R1,501 - R2,000	4.9%	6.9%	7.8%
	R2,001 - R3,000	9.3%	16.5%	18.0%
	R3,001 - R5,000	9.4%	13.5%	7.9%
	R5,001 - R7,500	7.3%	11.6%	7.4%
	R7,501 - R10,000	10.9%	6.7%	7.2%
	R10,001 - R15,000	10.6%	4.7%	5.0%
	R15,001 - R20,000	7.6%	4.9%	6.2%
	R20,001 - R30,000	3.4%	5.4%	2.3%
	R30,001+	9.0%	4.6%	3.4%
	Refused to answer	5.4%	3.2%	12.4%
	Don't Know / Uncertain	2.4%	0.5%	0.4%
	No income	2.7%	1.7%	0.3%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	23.6%	18.0%	12.7%
	25 - 34	22.9%	23.5%	32.6%
	35 - 44	21.8%	20.2%	22.7%
	45 - 54	15.7%	17.5%	11.8%
	55+	15.9%	20.9%	20.2%

APPENDIX D

DAY TRIPS BY
SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY DAY TRIPS

		Day Trips		
		Q3 2023	Q3 2024	Q3 2025
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	0.6%	2.1%	1.6%
	Some primary school	1.7%	2.1%	3.5%
	Primary school completed	5.6%	2.6%	1.7%
	Some high school	14.7%	29.7%	24.6%
	High school completed	39.3%	38.2%	43.9%
	Some college	5.9%	3.7%	4.3%
	College completed	5.9%	6.7%	7.4%
	Some university	4.0%	2.6%	2.7%
	Technikon diploma / degree	5.3%	4.3%	2.8%
	University degree / diploma	8.9%	6.7%	5.5%
	Post-graduate degree	8.3%	1.4%	2.0%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	55.7%	54.2%	56.2%
	Female	44.3%	45.8%	43.8%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	52.7%	54.1%	66.7%
	Married / Living together	42.9%	38.7%	23.1%
	Divorced / Widowed / Separated	4.5%	7.2%	10.2%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	31.7%	28.3%	31.0%
	Children, dependent	49.0%	55.7%	46.4%
	Children, independent	17.0%	11.1%	15.0%
	Children, dependent + independen	2.3%	4.9%	7.7%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	5.9%	8.8%	8.1%
	R501 - R750	2.2%	3.8%	4.7%
	R751 - R1,000	4.3%	6.1%	6.5%
	R1,001 - R1,500	4.7%	8.2%	7.3%
	R1,501 - R2,000	4.9%	6.4%	7.5%
	R2,001 - R3,000	9.3%	13.0%	13.5%
	R3,001 - R5,000	9.4%	17.3%	11.1%
	R5,001 - R7,500	7.3%	6.6%	7.7%
	R7,501 - R10,000	10.9%	5.5%	6.8%
	R10,001 - R15,000	10.6%	3.8%	3.5%
	R15,001 - R20,000	7.6%	8.0%	3.8%
	R20,001 - R30,000	3.4%	4.3%	2.9%
	R30,001+	9.0%	2.5%	2.1%
	Refused to answer	5.4%	2.4%	9.8%
	Don't Know / Uncertain	2.4%	0.5%	0.5%
	No income	2.7%	2.9%	4.2%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	23.6%	18.5%	17.8%
	25 - 34	22.9%	24.7%	30.3%
	35 - 44	21.8%	22.0%	22.0%
	45 - 54	15.7%	19.9%	15.0%
	55+	15.9%	14.9%	14.9%

APPENDIX E

SHARE OF TRANSPORT USED TO
TRAVEL TO DESTINATION

SHARE OF TRANSPORT TYPE

		Share of Transport Type		
		Q3 2023	Q3 2024	Q3 2025
Main Transport to Destination	Minibus taxi	24.4%	38.1%	40.5%
	Another car / van / bakkie	16.8%	22.8%	23.7%
	My car / van / bakkie	42.0%	22.7%	21.1%
	Tour bus	2.5%	0.4%	4.7%
	Commercial bus	5.4%	6.8%	4.3%
	Aeroplane	4.6%	2.2%	2.7%
	Rental car	3.7%	0.8%	1.6%
	Other	0.5%	1.2%	0.9%
	Truck / lorry	0.9%	0.0%	0.4%

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APPENDIX F
SHARE OF BEDNIGHTS BY
ACCOMMODATION TYPE

SHARE OF TOTAL BEDNIGHTS, BY ACCOMMODATION TYPE

		Share of Total Bednights		
		Q3 2023	Q3 2024	Q3 2025
Accommodation Type	Friends / Relatives	49.3%	68.0%	67.8%
	Guest House	17.8%	6.4%	8.8%
	Hotel	7.9%	4.3%	7.8%
	Other Accommodation	3.7%	7.9%	3.5%
	Self-Catering	4.6%	1.3%	3.1%
	Halls	1.5%	2.4%	2.5%
	B&B	2.8%	1.2%	2.0%
	Lodge	5.5%	2.2%	1.4%
	Hospital	0.6%	2.9%	0.9%
	AirBnB	2.1%	0.0%	0.7%
	Camping	1.7%	2.3%	0.7%
	Holiday Home	2.4%	0.9%	0.7%
	Hostel	0.0%	0.1%	0.2%

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