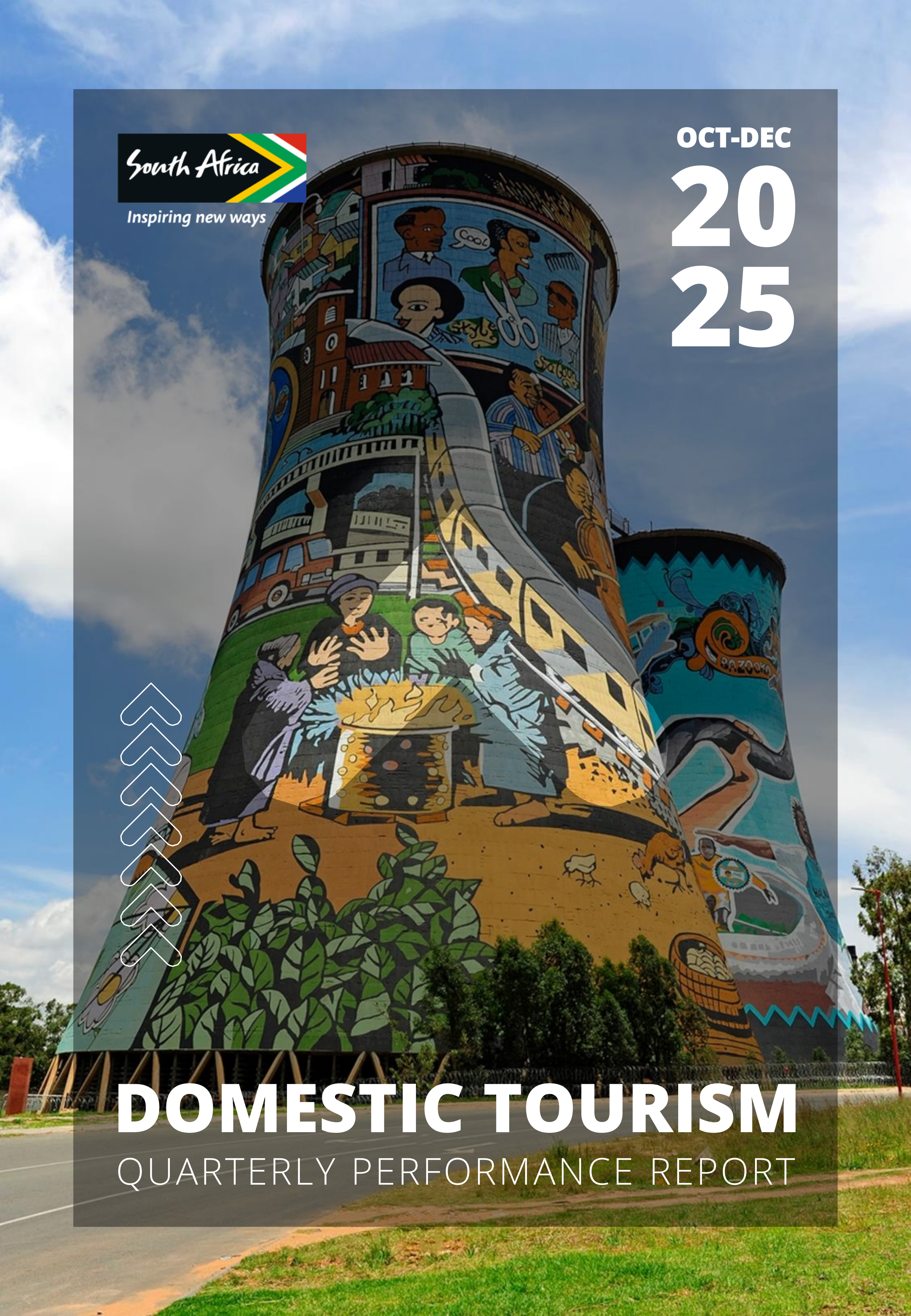

South Africa

Inspiring new ways

OCT-DEC

2025

DOMESTIC TOURISM

QUARTERLY PERFORMANCE REPORT

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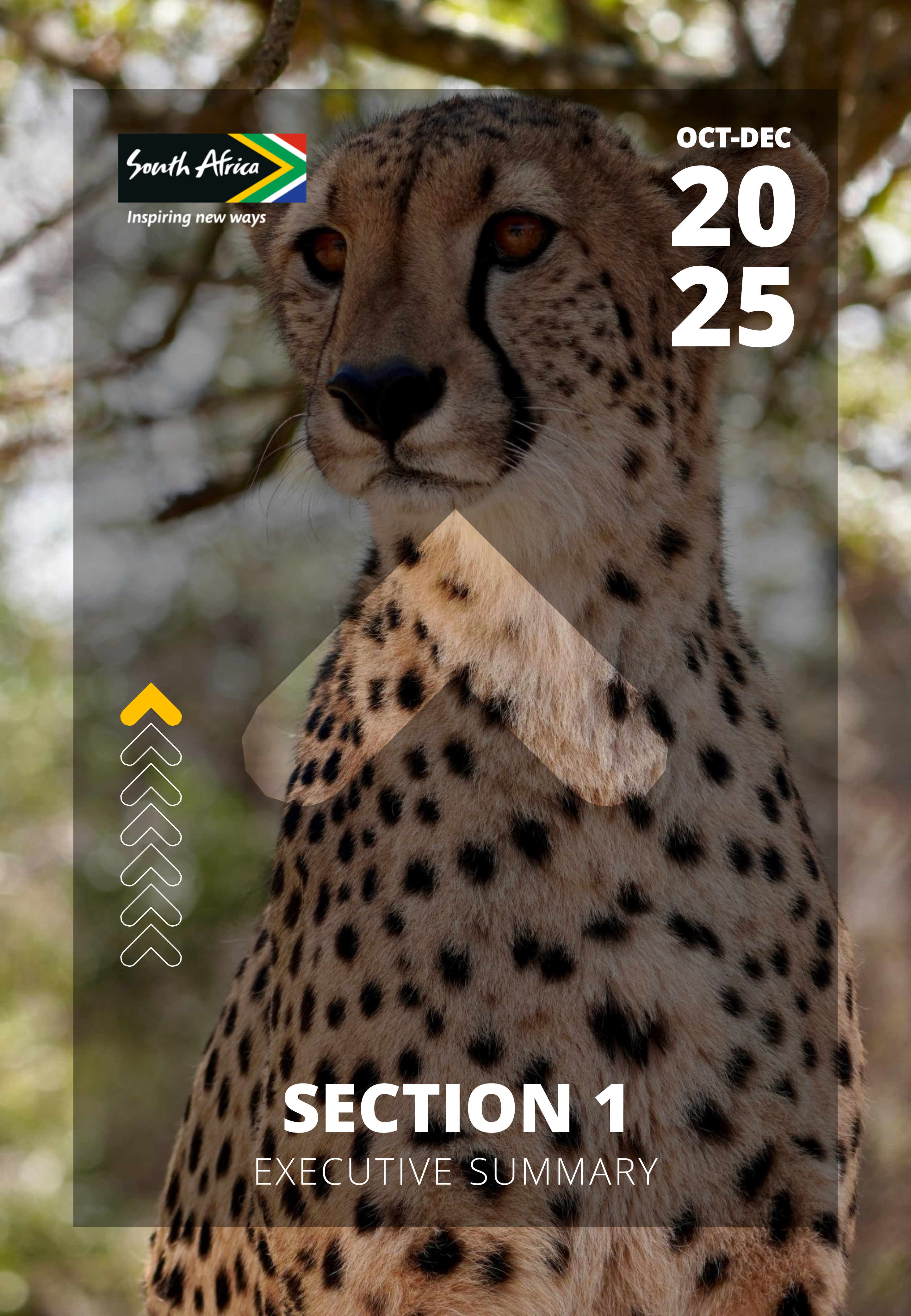


OCT-DEC
2025

SECTION 1

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

CONTEXT

The Quarter 4 2025 Domestic Travel Survey (DTS) results indicate a strong resurgence in domestic overnight travel, with total trips reaching 13.9-million, a +27.5% increase year-on-year. This growth represents a significant rebound in the final quarter of 2025, surpassing the 10-million-trip threshold for the first time since Q4 2022.

The increase is primarily driven by a larger number of domestic tourists entering the market, up from 9.7-million in Q4 2024 to 13.4-million (+37.4%) in Q4 2025, rather than existing travellers taking more trips, signalling broader participation in domestic tourism.

However, this volume growth is contrasted by a sharp contraction in total expenditure, indicating a market expanding in breadth (more people traveling) but shrinking in depth (lower spend per trip).

Total domestic overnight spending fell sharply by -30.9%, with the average spend per trip dropping by-45.8%. This suggests that while more people are travelling, financial pressures or value-conscious behaviour are reducing per-trip expenditure.

Domestic tourism is characterised by a continued, significant shift toward necessity-driven and value-based travel. Visiting Friends and Relatives (VFR) travel remained the main purpose for overnight trips in the fourth quarter of the year and showed a strong increase in share of trips. this trend continued with the share of travel increasing from 40.5% to 50.5% in Q4 2025, almost equalling the share of 51.2% in Q4 2022.

Holiday travel declined, professional trips grew modestly, while MICE trips contracted significantly. Religious trips remained stable during this period.

The growth in overnight trips and bednights reflects resilient seasonal travel during the festive period. Bednights increased substantially, and the average length of stay rose, indicating that travellers are extending their stays despite tighter budgets. The sharp decline in average spend per trip suggests that economic pressures are forcing travellers to adopt significant cost-saving measures.

EXECUTIVE SUMMARY

KEY INSIGHTS: OVERNIGHT TRIPS & SPEND

Volume Growth: Total domestic overnight trips rose by 27.5%, from 10.9-million in Q4 2024 to 13.9-million in Q4 2025. This growth was driven by a 37.4% increase in the number of travellers (13.4-million), indicating a broader base of South Africans entering the market and an expanded domestic travel base.

Financial Barrier: Financial reasons remain the primary barrier to travel (41.3%). Notably, "time constraints" rose to 15.5% (from 9.4%), while safety and security concerns dropped.

Spend Contraction: Total domestic overnight spending fell sharply by -30.9%, declining from R47.9-billion to R33.2-billion. The average spend per trip decreased significantly by -45.8%, from R4,401 to R2,387. This highlights a divergence between trip-volume growth and per-trip revenue, suggesting constrained budgets or lower-yield travel.

VFR Resilience: VFR trips saw a phenomenal +59.1% increase, reaching 7.0-million trips and accounting for 50.5% of all domestic travel. While total VFR spend grew slightly (+7.6%), the average spend per trip declined by -32.4% to R 1,873.

Holiday Spend Contraction: Although holiday trip volume grew slightly by +4.2% to 4.4-million, total holiday spend fell sharply by -43.9% to R14.3-billion. The average holiday spend nearly halved, declining from R6,101 to R3,284.

Extended Overnight Stays: Overall bednights rose by 42.8% to 71.8-million. Contrary to the spending trend, the average length of stay increased by 12.0% to 5.2 nights, indicating a shift towards longer trips. Growth was largely driven by VFR travel, with bednights rising from 19.5-million to 41.3-million in Q4 2025, while holiday bednights increased to 24.5-million. The average VFR stay also lengthened to 5.9 nights, suggesting travellers are extending visits while spending less per day.

Shift in Spending: All expenditure categories saw declines. Leisure & Entertainment recorded the steepest drop (-61.9%), while Food & Beverages (-25.8%) and Accommodation (-32.4%) also saw substantial contractions.

Declining Transport Spend: Overall transport-related spending (including fuel and fares) fell by -24.1% to R11-billion. Day trips declined by -14.1%, suggesting a shift towards fewer, longer overnight stays as travellers substitute multiple short trips to reduce transport costs.

EXECUTIVE SUMMARY

KEY INSIGHTS: PROVINCIAL RESULTS

Top Destinations: KwaZulu-Natal (3.0-million trips), Limpopo (2.4-million), and the Eastern Cape (2.1-million. Up +58.7%) were the top three destination provinces in Q4 2025.

Strong Economic Performers: The Eastern Cape was the standout economic performer, recording the highest total spend (R 6.6-billion, up +87.0%), the most bednights (20.0-million), and the longest average stay (9.5 nights, up +98.4%).

Provincial Setbacks: The Western Cape was the only province to record a decline in trips as a destination (-17.6%), with total spending falling by -55.8% to R3.8-billion. Despite high visitor volumes, KwaZulu-Natal and the North West recorded declines in spending, indicating challenges in converting trips into revenue.

Source Province Role: Gauteng remains the leading source province with 3.4-million trips (+24.6%), primarily driving inflows into Limpopo (47.9%), Mpumalanga (47.5%), and the North West (42.1%).

KEY INSIGHTS: DAY TRIPS & SPEND

Decline in Day Trips: Total domestic day trips fell by -14.1% to 30.8-million in Q4 2025. The Eastern Cape, which had experienced growth in Q4 2024, declined by -56.0% falling from 3.6-million to 1.6-million day trips in Q4 2025.

Day Trip Activity: VFR day trips increased by +17.4% to 12.1-million, holiday day trips declined by -28.7% to 6.7-million, personal shopping trips fell by -14.3% to 5.1-million, professional and business day trips increased moderately to 2.5-million, and MICE day trips grew to 1.0-million.

Day Trip Spend: Overall day trip spending grew marginally to R43.0-billion in Q4 2025, but remains below the R45.4-billion recorded in Q4 2023.

Shift Toward Overnight Travel: The divergence between increasing overnight trips and declining day trips suggests a preference for longer, potentially higher-value travel experiences over single-day excursions.

EXECUTIVE SUMMARY

STRATEGIC OVERVIEW & RECOMMENDATIONS

The Q4 2025 results reflect a domestic tourism market experiencing a “volume–value gap”, with participation expanding while revenue is not keeping pace. Strategic efforts should focus on converting high visitor volumes into meaningful economic value and capitalising on provincial strengths.

MAXIMISE VFR VALUE

- **Insight:** Visiting Friends and Relatives (VFR) remains the primary driver of trips, but per-trip spending is low. VFR bednights more than doubled, while average spend declined by -32.4%.
- **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. 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 local attractions), particularly in key source provinces.

HOLIDAY OFFER OPTIMISATION

- **Insight:** Holiday trips are rising modestly, but spending has nearly halved. Travellers are still taking trips but are cutting discretionary expenses such as leisure and entertainment.
- **Recommendation:** Promote “all-inclusive” and “fixed-price” budget holiday packages to reduce financial uncertainty. Partner with mid-range providers in easily drivable provinces 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.

CAPITALISE ON EXTENDED STAYS

- **Insight:** Longer average lengths of stay and increased bednights create opportunities to capture additional spend.
- **Recommendation:** Promote multi-night itineraries, bundled packages, and accommodation add-ons to convert extended stays into higher revenue.

Continued...

EXECUTIVE SUMMARY

TARGET INTRA-PROVINCIAL TRAVEL

- **Insight:** The Western Cape (89.4%) and KZN (74.9%) have extremely high intra-provincial travel rates.
- **Recommendation:** Leverage this "staycation" trend by promoting regional "Festive local" passes. This approach can help maintain visitor volumes while minimising transport costs that currently deter long-distance travel.

ADDRESS TRANSPORT COSTS AND INFRASTRUCTURE

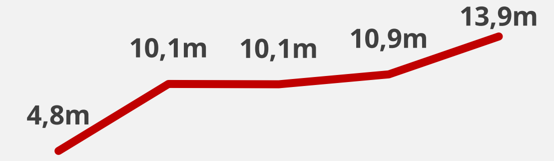
- **Insight:** The shift from day trips to longer overnight stays is a direct response to high transport costs.
- **Recommendation:** Promote “Stopover Tourism.” With 14.2-million visits involving stopovers, there is an opportunity to capture additional spending in transit provinces, such as the Free State and North West, for travellers *en route* to main destinations.

MONITOR AND RESPOND TO DAY TRIP TRENDS

- **Insight:** Declining day trips may signal reduced local discretionary spending.
- **Recommendation:** Launch localised, value-driven campaigns to encourage short-stay experiences or combined overnight/day packages, targeting leisure and professional travel segments.

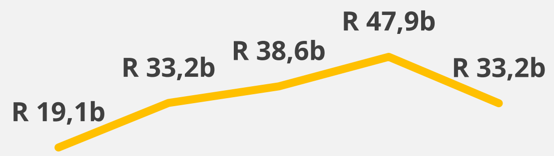
HEADLINE INDICATORS

OVERNIGHT TRIPS



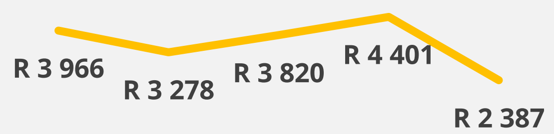
13.9m
+27.5%

OVERNIGHT SPEND



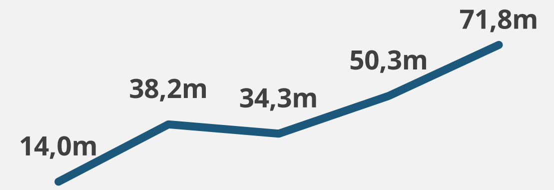
R 33.2b
-30.9%

AVERAGE OVERNIGHT SPEND



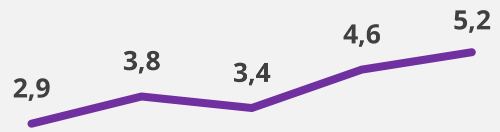
R 2,387
-45.8%

BEDNIGHTS



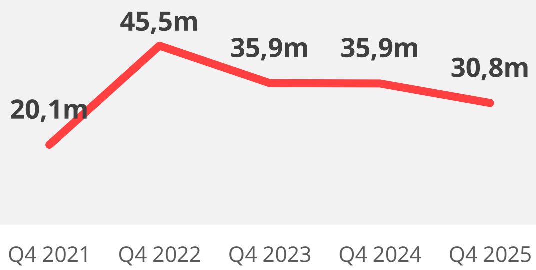
71.8m
+42.8%

LENGTH OF STAY



5.2
+12.0%

DAY TRIPS



30.8m
-14.1%

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2025

SECTION 2
ABOUT THE REPORT

DEFINITIONS

Domestic Overnight Trips: Domestic trips where tourists spend at least one night away from their usual place of residence, which are at least 40km, one way, but visited less frequently than once a week (unless for leisure purposes). These trips must not have been for relocation and remuneration purposes.

Domestic Overnight Spend: The total amount of money during an overnight stay at a destination, including accommodation, food, transportation, and activities.

Average Spend: The average spend refers to the mean amount of money spent by a specific group of individuals over a set period. For domestic tourism, it would be the total amount of money spent by all domestic tourists, divided by the number of trips.

Domestic Day Trips: Domestic trips outside of the tourist's usual environment, which are at least 40km, one way, but visited less frequently than once a week (unless for leisure purposes). These trips must not have been for relocation and remuneration purposes, and the tourist returns to their place of residence on the same day.

Domestic Day Spend: The total amount of money spent by domestic tourists during a day trip, including expenditures on transportation, food, and activities.

Domestic Tourists: Residents of a country who travel to and stay in places within their own country for leisure, business, or other purposes.

Geographic Spread: Domestic tourists' distribution and movement patterns across different regions or provinces within a country.

Bednights: The total number of nights spent in accommodation by domestic tourists.

Length of Stay: The number of nights a domestic tourist spends at a destination during their trip.

Main Destination Province: A tourism trip's main destination province is the place visited that is central to the decision to take the trip.

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

Main Purpose: The purpose in the absence of which the trip would not have been taken.

Business Travel/MICE trips: Domestic trips undertaken primarily for work-related purposes, including meetings, conferences, and business exhibitions.

VFR (Visiting Friends and Relatives): Domestic trips undertaken primarily to visit friends or family, rather than for leisure, business, or other reasons.

Holiday/Leisure Trips: Domestic trips undertaken primarily for leisure or vacation purposes, excluding trips for business or other reasons.

BACKGROUND

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

The survey is designed to cover three categories of respondents, namely: a) non-travellers in the past 12 months; b) travellers in the past 12 months; and c) travellers in the past month.

The key domestic travel indicators measured are:

- **Volume:** the incidence of domestic travel and how many trips are taken
- **Value:** how much is spent by domestic tourists
- **Number of bednights:** The number of nights spent in various establishments
- **Provincial distribution:** How the volume, value, and bednights are distributed between the nine provinces
- **Seasonality:** When do people travel?

OBJECTIVES

The key objectives of the DTS are to:

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

BACKGROUND

SURVEY ARCHITECTURE

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

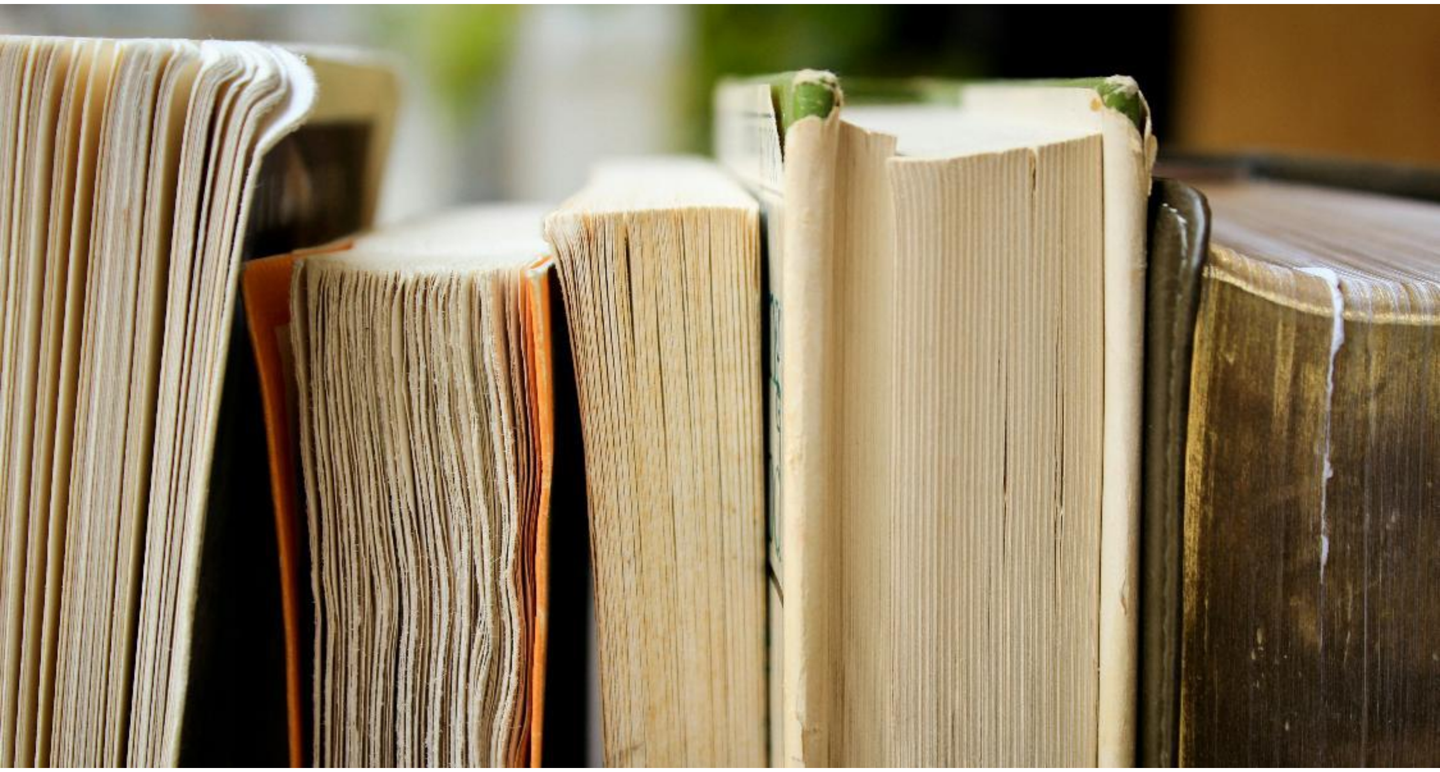
The monthly sample consists of 1,300 adult respondents, and data is collected through face-to-face interviews conducted in the respondent's home.

The core architecture of the survey achieves the following:

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

ADDITIONAL SOURCES

1. https://africabizmonitor.com/2026/01/17/gdp-growth | South Africa GDP Growth Surges 1.8% in Q4 2025
2. Statistical Release P0441: Consumer Price Index December 2025. https://www.statssa.gov.za/publications/P0141/P0141December2025.pdf
3. Statistical Release P0211: Quarterly Labour Force Survey (QLFS) – Q4: 2025. 17 February 2026. Statistics South Africa.
4. https://www.resbank.co.za/en/home/publications/publication-detail-pages/statements/monetary-policy-statements/2025/november
5. https://www.dmre.gov.za/news-room/post/2889 | Media statement the Minister of Mineral and Petroleum Resources announces adjustment of fuel prices effective from the 3rd of December 2025
6. https://www.resbank.co.za/en/home/publications/publication-detail-pages/quarterly-bulletins/quarterly-bulletin-publications/2025/december



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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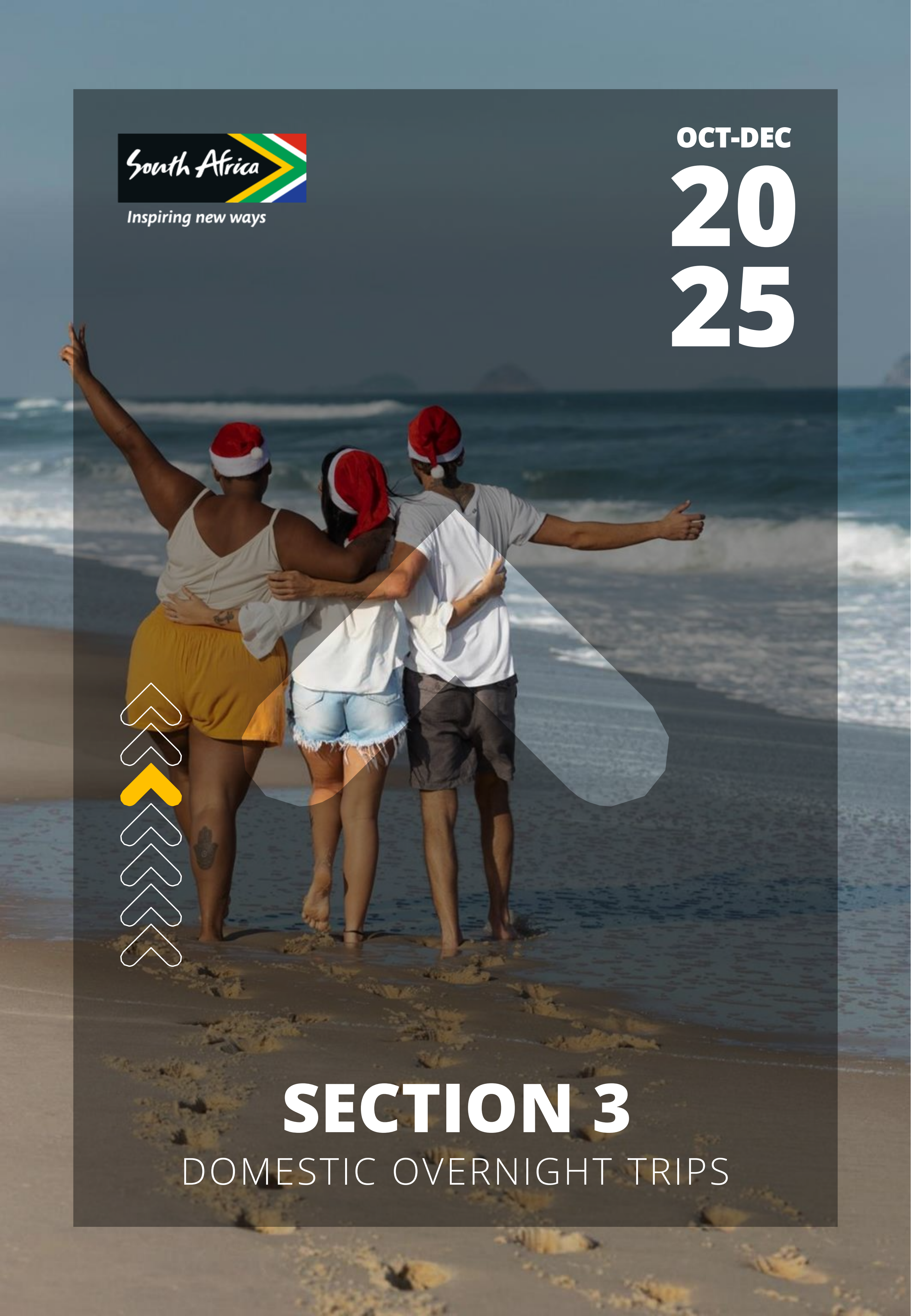


Inspiring new ways

OCT-DEC 2025

SECTION 3

DOMESTIC OVERNIGHT TRIPS

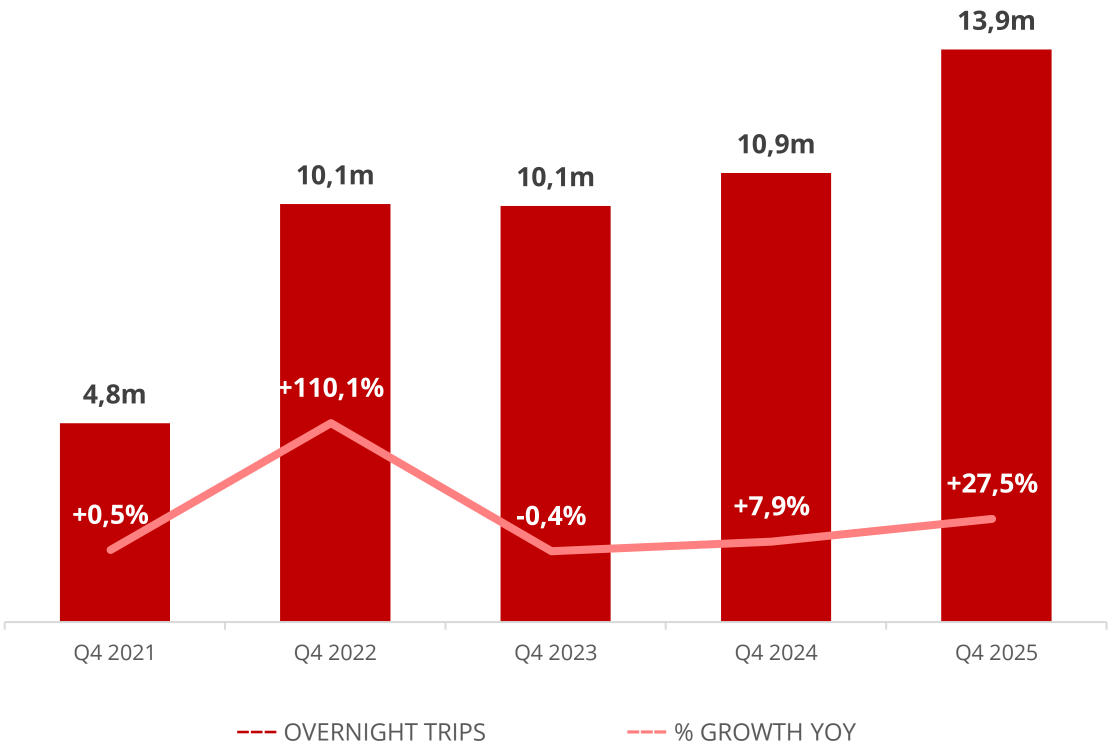
OVERNIGHT TRIPS

13.9m **+27.5%**

Domestic overnight trips rose to 13.9-million in Q4 2025, demonstrating strong year-on-year growth of +27.5%. Overnight trips had remained steady at around 10+-million from Q4 2022 to Q4 2024.

This marks **the first time the total has exceeded the 10-million trip mark since Q4 2022**, indicating that travel demand remains robust in the final quarter of 2025.

OVERNIGHT TRIPS: Q4 2021 – Q4 2025



OVERNIGHT TRIPS

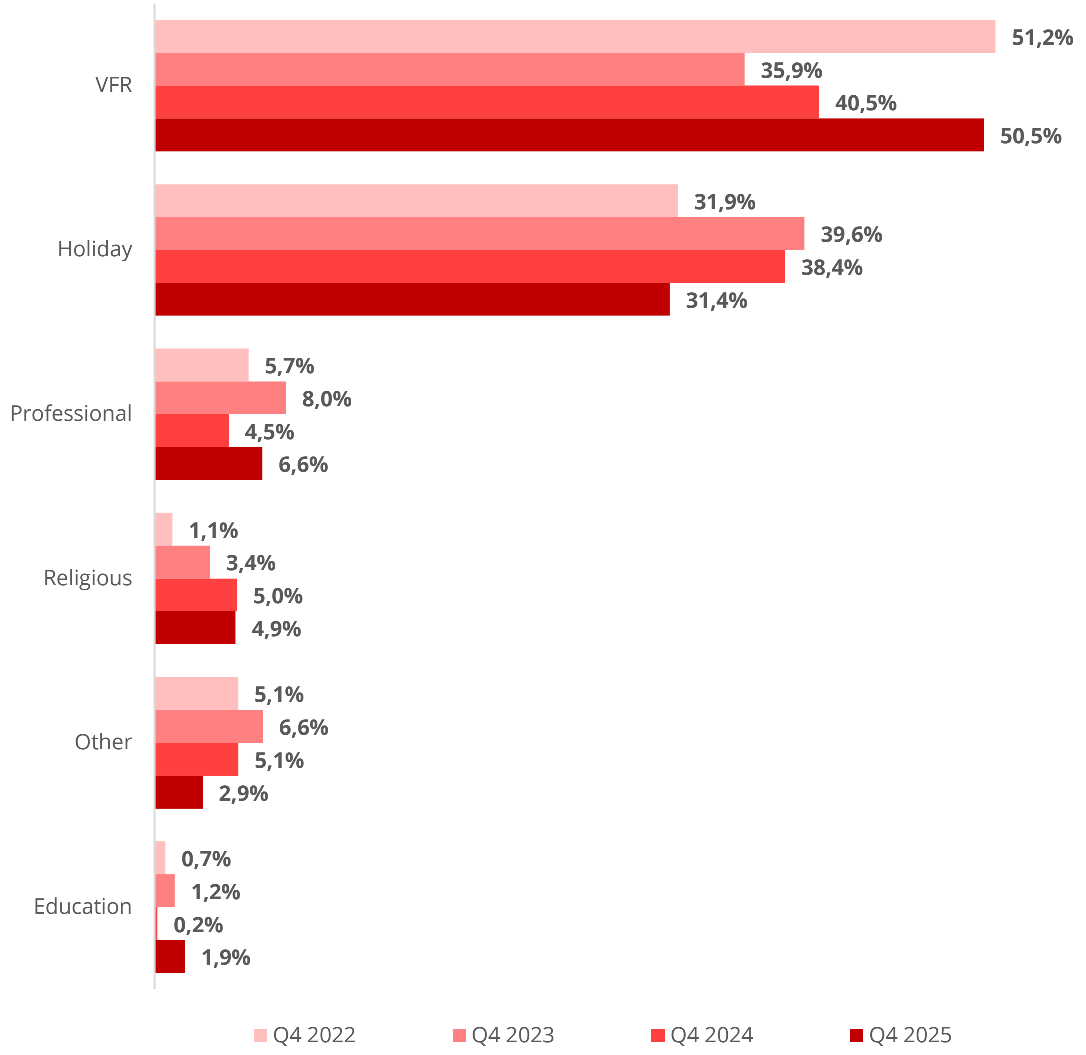
13.9m **+27.5%**

VFR remained the main purpose for overnight trips in the fourth quarter of the year and showed a strong increase in share of trips. This trend continued, with the share of travel increasing from 40.5% to 50.5% in Q4 2025, almost equalling the share of 51.2% in Q4 2022. In contrast, the share of holiday trips fell from 38.4% to 31.4% in Q4 2025.

While MICE trips declined from 3.6% to 0.4%, trips for professional purposes rose from 4.5% in Q4 2024 to 6.6% in Q4 2025.

Trips for religious purposes remained constant at a share of 4.9% in Q4 2025.

SHARE OF OVERNIGHT TRIPS BY PURPOSE: Q4 2022 – Q4 2025



OVERNIGHT TRIPS 13.9m +27.5%

VFR	HOLIDAY	MICE
7.0m +59.1%	4.4m +4.2%	61k -84.6%
R 13.1b +7.6%	R 14.3b -43.9%	R 356.7m -87.9%
R 1,873 -32.4%	R 3,284 -46.2%	R 5,831 -21.8%
41.3m +112.1%	24.5m +14.2%	403k -67.2%
5.9 +33.1%	5.6 +9.6%	6.6 +112.5%
50.5% +24.8%	31.4% -18.3%	0.4% -87.9%

Consistent with the trend in Q4 2024, the VFR category of domestic travel continued its upward trajectory in Q4 2025.

The number of VFR trips rose by a phenomenal +59.1%, reaching 7.0-million in Q4 2025. The VFR share of total trips grew to +50.5% over the same period (up by +24.8%).

Total VFR spend increased by +7.6% in Q4 2025, from R 12.2-billion to R 13.1-billion. Average spend per trip, however, showed a sharp decline of -32.4%, from R 2,770 to R 1,873.

The number of bednights more than doubled in Q4 2025, increasing by +112.1%, from 19.5-million in Q4 2024 to 41.3-million in Q4 2025. The average length of stay grew from 4.4 to 5.9 nights.

The holiday category's share of total domestic trips declined to 31.4% in Q4 2025

Despite this decline, total trips grew by +4.2% to 4.4-million, bed nights increased by +14.2% to 24.5-million, and the average length of stay rose to 5.6 nights (from 5.1).

Total spend on holiday trips experienced a sharp decline of -43.9%, from R 25.5-billion to R 14.3-billion. Average spend declined by -46.2%, dropping to R 3,284 from R 6,101.

Holiday spend experienced declines across each quarter in 2025, while VFR spend (and trips) showed continued growth over the same period. VFR travel has shown resilience even when discretionary holiday travel slows.

The MICE category declined in Q4 2025, accounting for only a 0.4% share of total domestic trips.

MICE trips decreased to 61k (-84.6%). Bed nights decreased from 1.2-million to 403k (-67.2%), while length of stay rose substantially from 3.1 nights in Q4 2024 to 6.6 nights in Q4 2025.

Total MICE spend experienced a substantial decline of -87.9%, falling from R3-billion to R356.7-million. Average spend per trip fell by -21.8%, from R7,456 to R5,831.

MICE experienced fluctuations in domestic travel in 2025, with its share falling in Q1 and Q2, rising in Q3, and declining again in Q4.

MICE travel is highly discretionary, so economic downturns or rising business costs can quickly reduce demand or attendance.

OVERNIGHT TRIPS 13.9m +27.5%

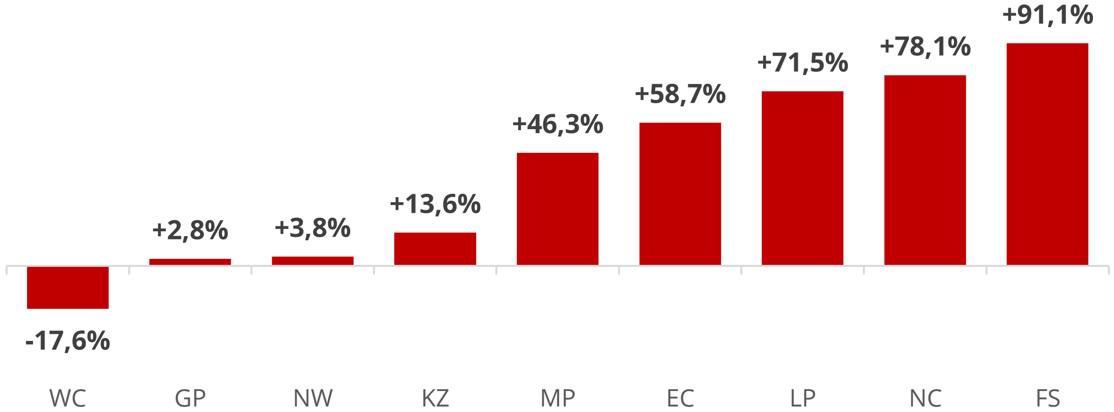
The provincial growth rates in Q4 2025 indicate a strong rebound in domestic travel. With the exception of the Western Cape, all provinces recorded growth as main destination provinces.

The Free State (+91.1%) recorded the highest growth, followed by the Northern Cape (+78.1%) and Limpopo (+71.5%). Gauteng (+2.8%) recorded the lowest growth rate, followed by the North West (+3.8%). The Western Cape (1.3-million trips) declined by -17.6% as a main destination province.

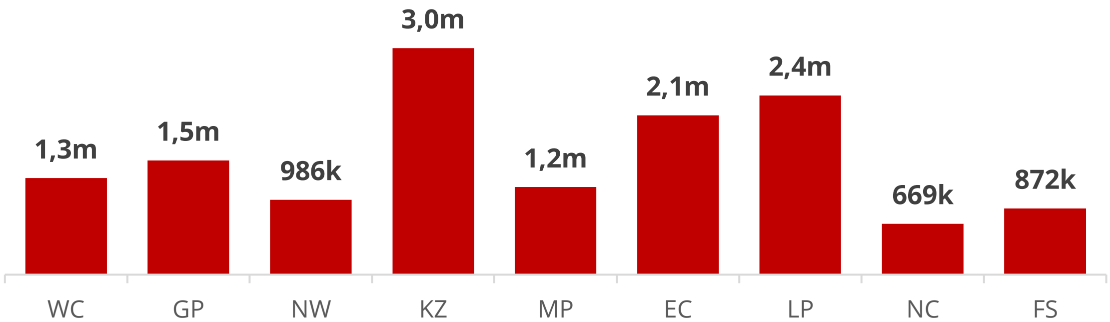
Despite its moderate growth in Q4 2025, KwaZulu-Natal has remained the leading main destination province since Q4 2023. KwaZulu-Natal (3.0-million), Limpopo (2.4-million) and the Eastern Cape (2.1-million) were the top three main destination provinces in Q4 2025.

Limpopo grew from 1.4-million trips to 2.4-million trips, the Eastern Cape from 1.3-million to 2.1-million trips, and Mpumalanga from 787k to 1.2-million trips. The Northern Cape rebounded from 376k trips in Q4 2024 to 669k trips in Q4 2025, recovering from its previous decline.

DESTINATION PROVINCE GROWTH RATE: Q4 2024 v Q4 2025



TRIPS TO DESTINATION PROVINCE: Q4 2025



TRIPS TO DESTINATION PROVINCE: Q4 2023 – Q4 2025

	WC	GP	NW	KZ	MP	EC	LP	NC	FS
Q4 2023	812k	2.1m	1.0m	1.9m	1.6m	2.0m	1.9m	424k	988k
Q4 2024	1.5m	1.5m	949k	2.6m	787k	1.3m	1.4m	376k	456k
Q4 2025	1.3m	1.5m	986k	3.0m	1.2m	2.1m	2.4m	669k	872k

OVERNIGHT TRIPS 13.9m +27.5%

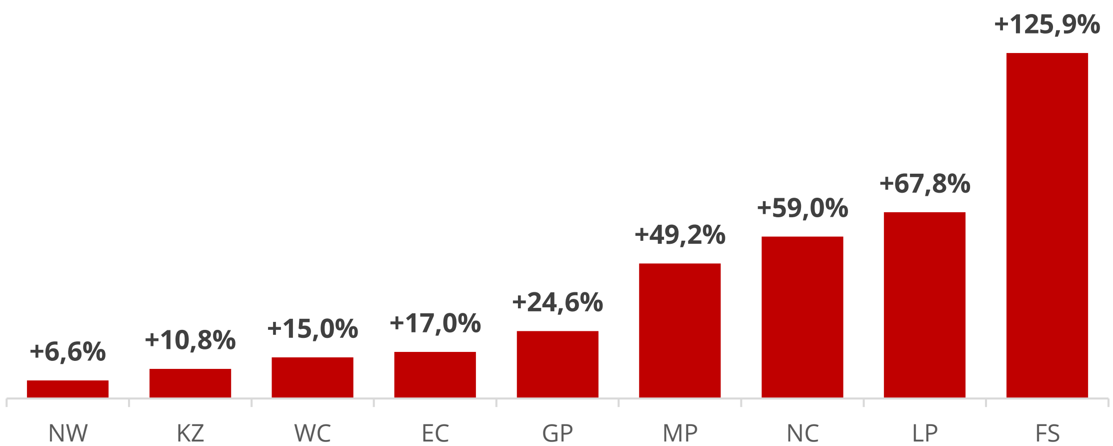
All provinces recorded growth as source provinces for domestic overnight travel in Q4 2025.

The Free State (+125.9%) recorded the highest growth as a source province, followed by Limpopo (+67.8%), the Northern Cape (+59.0%) and Mpumalanga (+49.2%) in Q4 2025 compared to Q4 2024. The North West recorded the lowest growth at +6.6%.

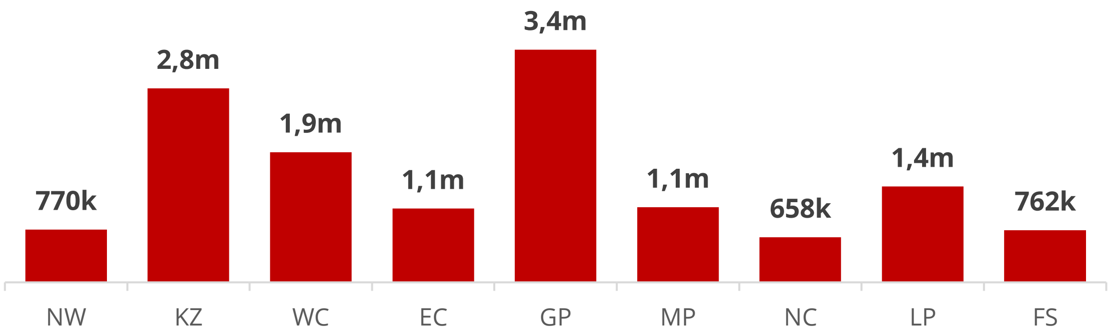
Gauteng grew by +24.6% to reach 3.4-million trips, remaining the leading source province in Q4 2025, followed by KwaZulu-Natal (2.8-million) and the Western Cape (1.9-million). Limpopo grew from 833k to 1.4-million trips, and the Eastern Cape from 921k to 1.1-million trips.

The Northern Cape has continued to grow as a source province in the fourth quarter year-on-year since 2022, reaching 658k trips in Q4 2025.

SOURCE PROVINCE GROWTH RATE: Q4 2024 v Q4 2025



TRIPS FROM SOURCE PROVINCE: Q4 2025



TRIPS FROM SOURCE PROVINCE: Q4 2023 – Q4 2025

	NW	KZ	WC	EC	GP	MP	NC	LP	FS
Q4 2023	677k	1.2m	636k	1.2m	2.8m	417k	373k	2.0m	773k
Q4 2024	722k	2.6m	1.7m	921k	2.7m	735k	414k	833k	337k
Q4 2025	770k	2.8m	1.9m	1.1m	3.4m	1.1m	658k	1.4m	762k

OVERNIGHT TRIPS **13.9m** +27.5%

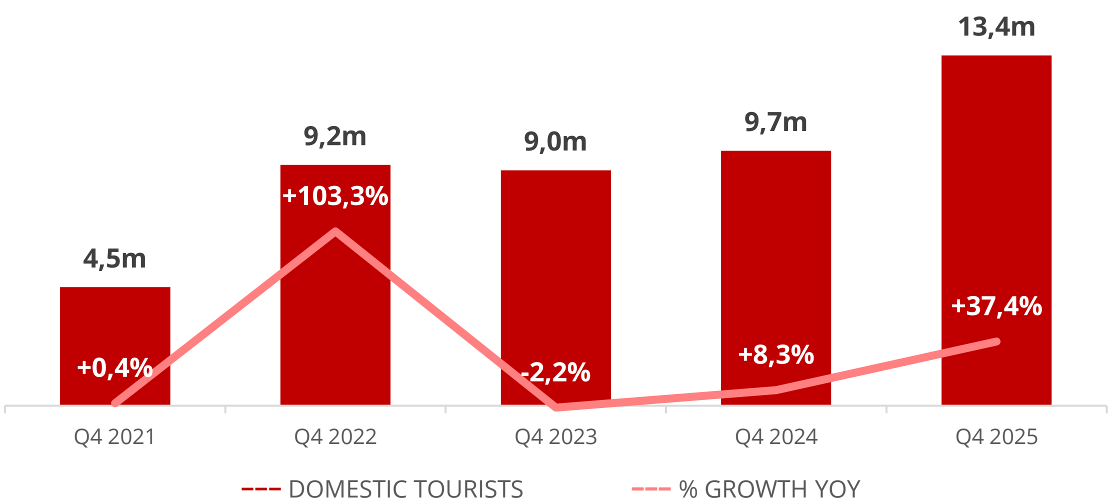
In Q4 2025, the number of domestic tourists grew strongly by 37.4% to 13.4-million, up from 9.7-million in Q4 2024. This points to a continuing upward trajectory.

Although the average number of domestic trips per tourist declined by -7.2%, it remained steady at about 1.0 trip, consistent with previous years for the same quarter.

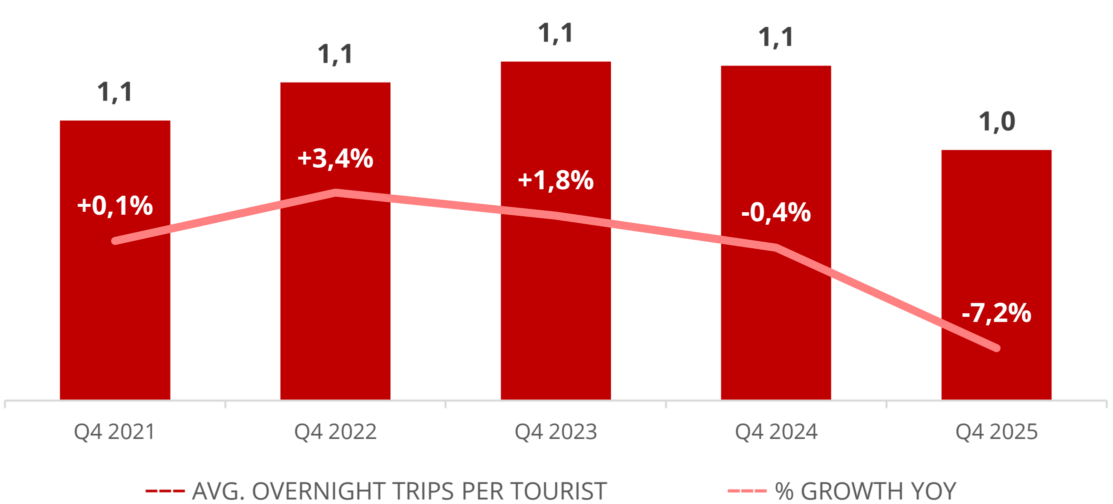
The implication is that domestic travel growth is being driven by more people travelling rather than by existing travellers taking additional trips (13.9-million trips versus 13.4-million tourists).

The increase reflects a broader base of domestic tourists entering the market, with more individuals participating in travel. This is positive for reaching new customers, as growth depends on attracting new travellers, indicating that the domestic tourism market is expanding in breadth rather than depth.

DOMESTIC TOURISTS: Q4 2021 – Q4 2025



AVG. OVERNIGHT TRIPS PER TOURIST: Q4 2021 – Q4 2025



OVERNIGHT TRIPS

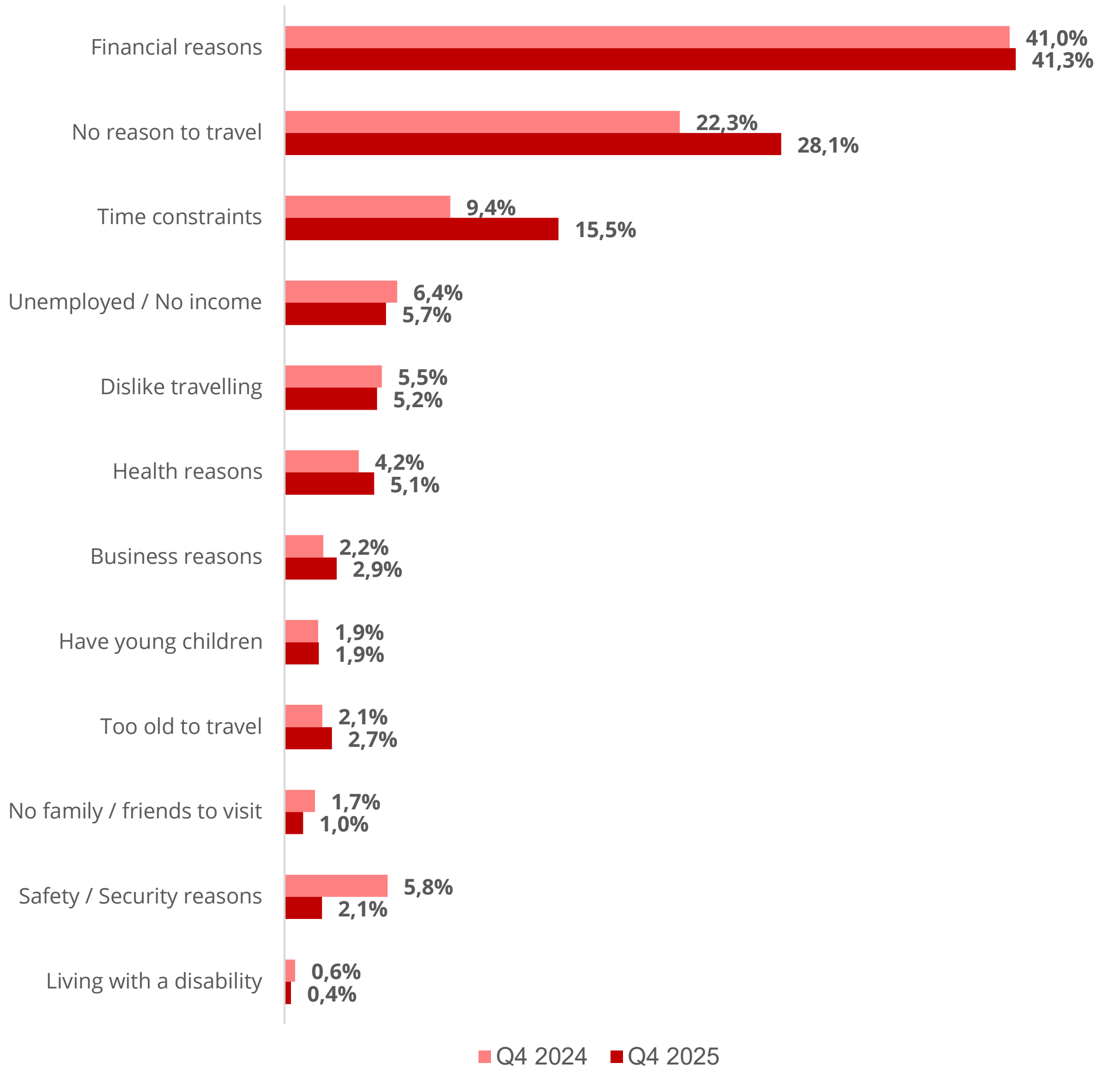
13.9m +27.5%

In Q4 2025, the three main reasons for not travelling, in order of frequency, were financial reasons (41.3%), no reason to travel (28.1%), and time constraints (15.5%).

Although these reasons remained broadly consistent with previous year-on-year trends, the changing proportions are notable: "no reason to travel" increased from 22.3% to 28.1%, and "time constraints" rose from 9.4% to 15.5%. Interestingly, safety and security concerns for not travelling fell from 5.8% to 2.1%.

When both financial and time constraints are considered, the cost of travel goes beyond transport, accommodation, and activities to include the opportunity cost of time, making shorter, flexible trips or weekend getaways more relevant and appealing.

REASONS FOR NOT TRAVELLING: Q4 2024 v Q4 2025



DOMESTIC SPEND

R 33.2b **-30.9%**

After an upward year-on-year trend from Q4 2022 to Q4 2024, domestic overnight spending fell sharply by -30.9% in Q4 2025, declining from R47.9-billion to R33.2-billion compared to Q4 2024.

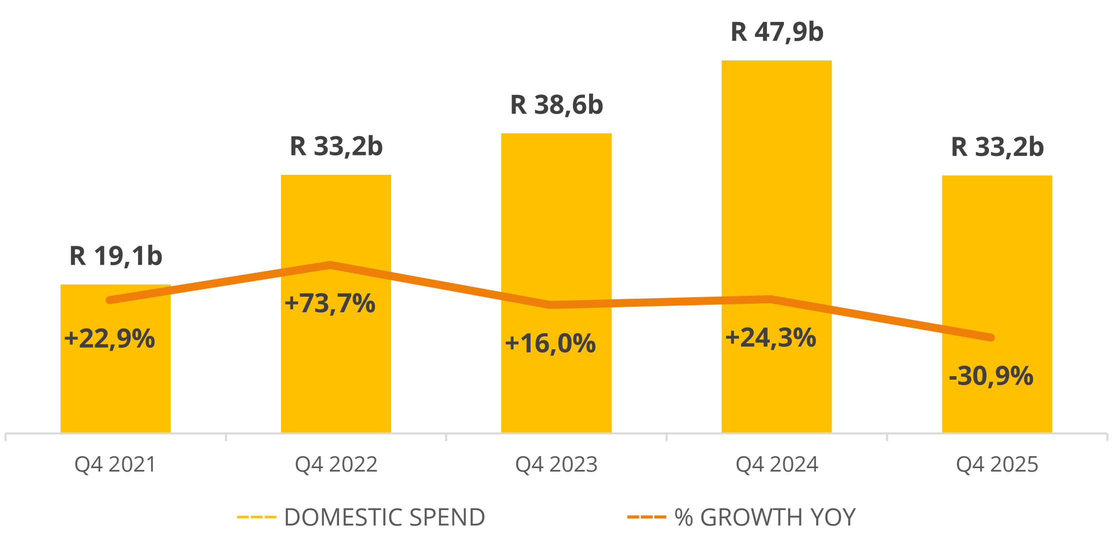
Although spending by holidaymakers and VFR travellers accounted for 82.8% of total domestic spending in Q4 2025, the share of holiday spending fell to 43.2% (from 55.2%), while the share of VFR spending rose to 39.6% (from 25.5%).

Holiday spending fell sharply by -43.9%, from R25.5-billion to R14.3-billion in Q4 2025 compared to Q4 2024. In contrast, VFR spending grew slightly by +7.6%, from R12.2-billion to R13.1-billion over the same period.

Spending on trips for professional purposes remained stable at approximately R3.1-billion in both Q4 2024 and Q4 2025.

While holiday spending fell sharply in Q4 2025, VFR spending remained resilient, growing slightly and providing an important revenue buffer for the domestic tourism market. Even when overall domestic travel spending drops, the steady VFR spend cushions the market, maintaining a baseline of economic activity for tourism businesses.

DOMESTIC SPEND: Q4 2021 – Q4 2025



DOMESTIC SPEND BY PURPOSE: Q4 2024 v Q4 2025

	Q3 2024	Q4 2025	% 2024	% 2025
Holiday	R 25.5b	R 14.3b	53.2%	43.2%
VFR	R 12.2b	R 13.1b	25.5%	39.6%
Professional	R 3.1b	R 3.1b	6.4%	9.3%
Religious	R 1.3b	R 889.8m	2.7%	2.7%
Other	R 1.5b	R 605.4m	3.0%	1.8%

DOMESTIC SPEND

R 33.2b -30.9%

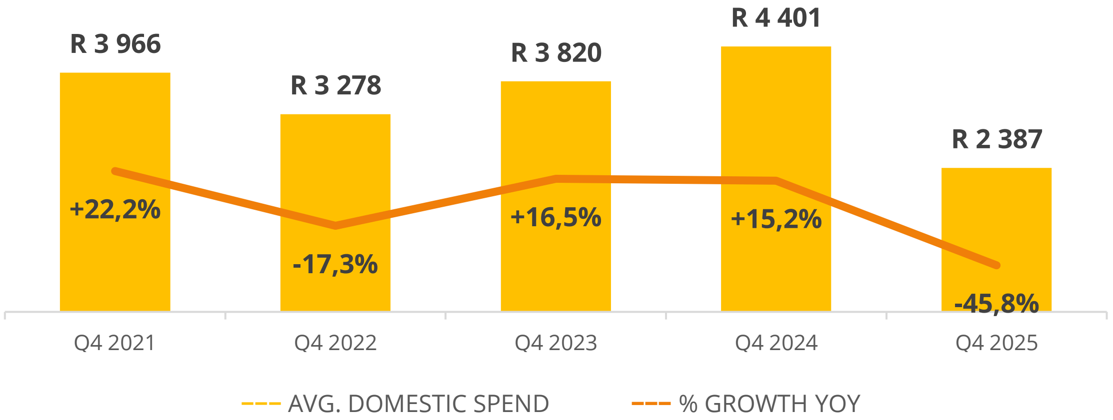
The average domestic spend per trip took a nosedive of -45.8%, dropping from R4,401 in Q4 2024 to R2,387 in Q4 2025.

Average spend on holiday trips saw the largest decline, falling by -46.2%, from R6,101 in Q4 2024 to R3,284 in Q4 2025. Although VFR total spend grew marginally by +7.6% in Q4 2025, the average spend per trip declined by -32.4%, from R2,770 to R1,873. Following increases in Q4 2023 and Q4 2024, MICE average spend per trip experienced a decline of -21.8%, falling to R5,831.

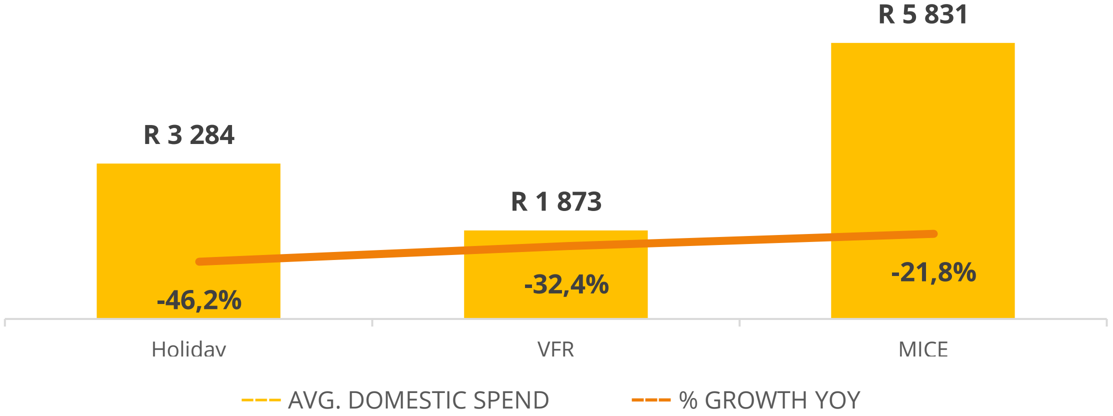
Travel activity remains, but average expenditure per trip has declined significantly. Put another way, people are still travelling, but they are spending much less on a trip when they do travel.

Declines in average spend mean that increases in traveller volumes do not automatically translate into higher revenue. The sector faces a scenario where growth in volume is not generating equivalent growth in value.

AVERAGE DOMESTIC SPEND: Q4 2021 – Q4 2025



AVERAGE DOMESTIC SPEND BY PURPOSE: Q4 2025



DOMESTIC SPEND R 33.2b -30.9%

Food & Beverages was the largest expenditure category in Q4 2025; however, it declined by -25.8%, falling from R11.1-billion to R8.3-billion. Accommodation, which had grown substantially in Q4 2024, also declined sharply in Q4 2025 by -32.4%, from R8.4-billion to R5.7-billion.

Leisure & Entertainment recorded the largest decline, falling by -61.9% from R2.9-billion to R1.1-billion in Q4 2025. Personal Shopping declined by -24.1%, reaching R6.0-billion.

Please note that transport expenditure was reclassified in the Q2 and Q3 2025 reports into two categories: **Transport** (plane, bus, and long-distance taxi fares) and **Vehicle** (fuel and servicing costs). In Q4 2025, under this classification, Transport spend was R5.3-billion and Vehicle spend R5.7-billion, totalling R11.0-billion. This is down from R14.1-billion in Q4 2024, representing an overall decline of approximately R3.1-billion in transport-related spending (down by -24.1%).

Categories such as Food & Beverages, Accommodation, Transport, and Leisure previously experienced growth, but all now show substantial declines in Q4 2025. This indicates a broad-based reduction in spending power, not just isolated dips in certain segments.

DOMESTIC SPEND BY CATEGORY: Q4 2024 v Q4 2025

	Q4 2024	Q4 2025	
FOOD & BEVERAGES	R 11.1b	R 8.3b	-25.8%
PERSONAL SHOPPING	R 7.9b	R 6.0b	-24.1%
VEHICLE	R -	R 5.7b	- %
ACCOMMODATION	R 8.4b	R 5.7b	-32.4%
TRANSPORT	R 14.1b	R 5.3b	- %
LEISURE & ENTERTAINMENT	R 2.9b	R 1.1b	-61.9%

BEDNIGHTS

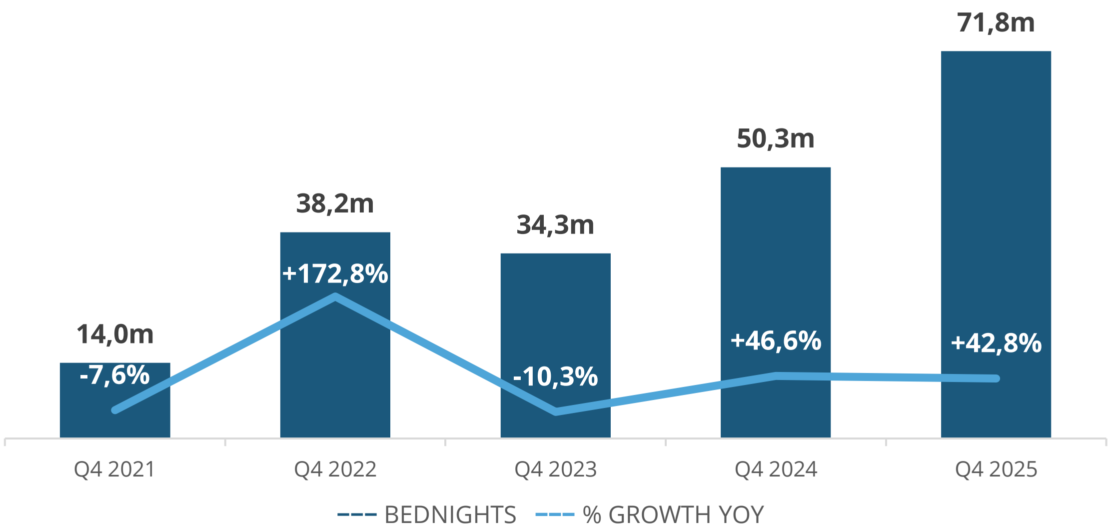
71.8m +42.8%

In Q4 2025, bednights increased substantially by +42.8%, rising from 50.3-million to 71.8-million compared with Q4 2024.

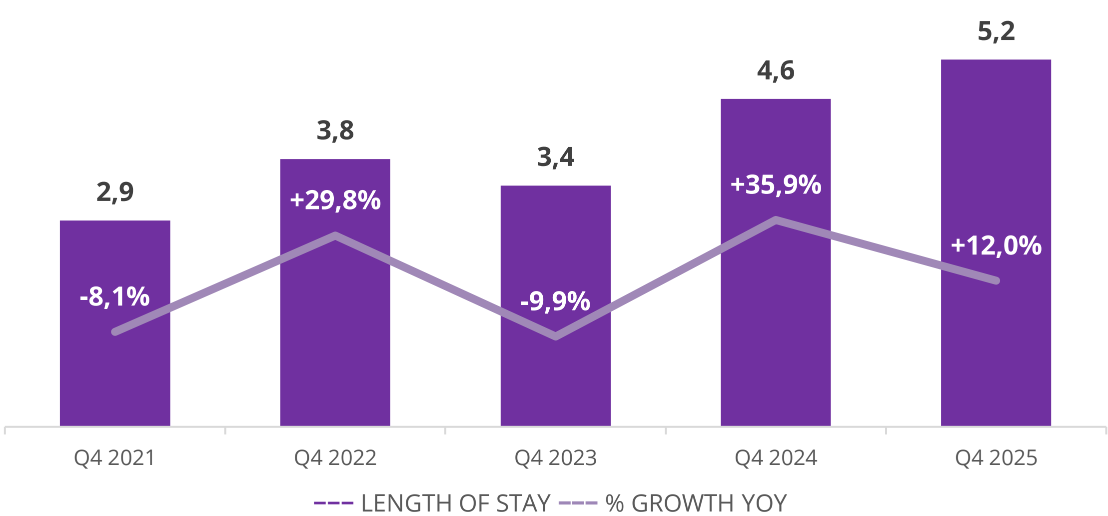
The average length of stay also increased by +12.0%, from 4.6 nights in Q4 2024 to 5.2 nights in Q4 2025.

The increase in domestic overnight trips, bednights, and average length of stay in Q4 2025 mirrors that of Q4 2024 and is indicative of resilient seasonal travel demand during the year-end holiday period, despite weaker expenditure per trip.

DOMESTIC BEDNIGHTS: Q4 2021 – Q4 2025



DOMESTIC LENGTH OF STAY: Q4 2021 – Q4 2025



OCT-DEC

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SECTION 4

PROVINCIAL PERFORMANCE

PROVINCIAL PERFORMANCE

In Q4 2025, KwaZulu-Natal, the Eastern Cape, Gauteng, Limpopo, and the Western Cape led the tourism landscape due to high trip volumes and high-value activity.

KwaZulu-Natal was the volume leader, recording the highest number of overnight trips at 3.0-million (+13.6%), the second-highest total overnight spend at R5.8-billion (down -52.7%), and the second-highest number of bednights at 14.6-million (+54.4%).

The Eastern Cape saw substantial growth as a main destination province, recording 2.1-million trips (+58.7%), the highest total spend at R6.6-billion (+87.0%), the most bednights at 20.0-million (+214.9%), and the longest average stay at 9.5 nights (+98.4%).

Gauteng, Limpopo, and the Western Cape ranked closely together as the next best-performing provinces in Q4 2025:

- **Gauteng:** Remained stable at 1.5-million trips (+2.8%) and recorded the third-highest total overnight spend at R4.9-billion (down -26.7%).
- **Limpopo**: Saw an increase in overnight trips, reaching 2.4-million (+71.5%), with a total spend of R3.7-billion (down -23.5%).
- **Western Cape:** Recorded 1.3-million trips (-17.6%) and a total spend of R3.8-billion (-down 55.8%).

OVERNIGHT TRIP PERFORMANCE INDICATORS BY DESTINATION PROVINCE: Q4 2025

	TRIPS	SPEND	AVG SPEND	BEDNIGHTS	LOS
EC	2.1m	R 6.6b	R 3,136	20.0m	9.5
FS	872k	R 1.6b	R 1,863	2.2m	2.5
GP	1.5m	R 4.9b	R 3,235	5.7m	3.8
KZ	3.0m	R 5.8b	R 1,952	14.6m	4.9
LP	2.4m	R 3.7b	R 1,554	12.5m	5.3
MP	1.2m	R 2.9b	R 2,535	4.4m	3.8
NC	669k	R 1.5b	R 2,299	3.0m	4.4
NW	986k	R 2.4b	R 2,411	4.6m	4.7
WC	1.3m	R 3.8b	R 2,966	4.8m	3.8

PROVINCIAL PERFORMANCE

Mpumalanga reached 1.2-million overnight trips (+46.3%), the North West 986k trips (+3.8%), the Free State 872k trips (+91.1%), and the Northern Cape 669k trips (+78.1%).

The Western Cape, KwaZulu-Natal, and the North West had the largest declines in spend in Q4 2025 compared to Q4 2024.

Only the Eastern Cape and the Northern Cape recorded increases in spend: the Eastern Cape grew from R3.5-billion to R6.6-billion, and the Northern Cape from R1.2-billion to R1.5-billion.

The results indicate that KwaZulu-Natal and the Eastern Cape were the key drivers of tourism in Q4 2025, with the Eastern Cape showing particularly strong growth in spend, trips, and bednights.

In contrast, the Western Cape, KwaZulu-Natal, and North West faced significant declines in spending, suggesting potential challenges in revenue despite high visitor volumes.

OVERNIGHT TRIP PERFORMANCE INDICATORS BY DESTINATION PROVINCE: Q4 2025

	TRIPS	SPEND	AVG SPEND	BEDNIGHTS	LOS
EC	2.1m	R 6.6b	R 3,136	20.0m	9.5
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KZ	3.0m	R 5.8b	R 1,952	14.6m	4.9
LP	2.4m	R 3.7b	R 1,554	12.5m	5.3
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NW	986k	R 2.4b	R 2,411	4.6m	4.7
WC	1.3m	R 3.8b	R 2,966	4.8m	3.8

PROVINCIAL PERFORMANCE

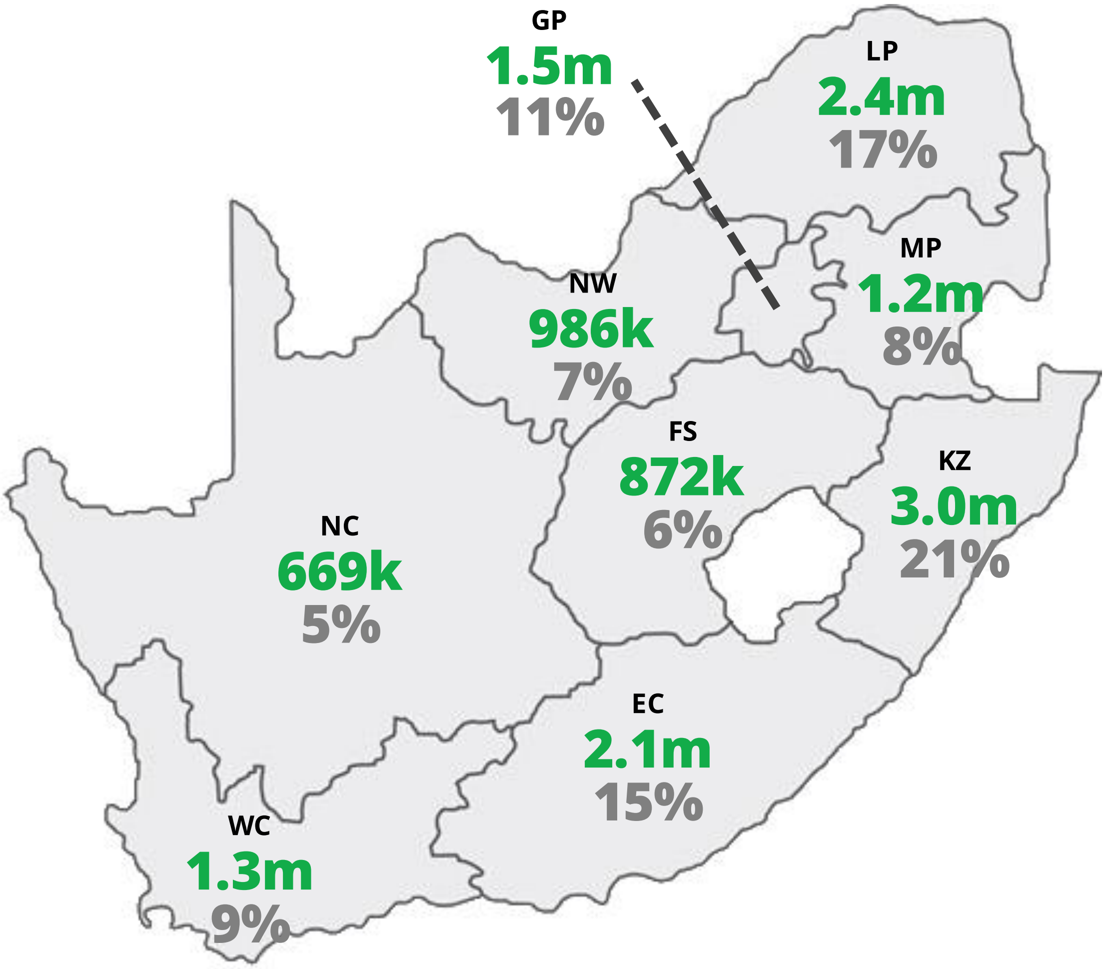
In Q4 2025, the total number of overnight trips across South Africa was 13.9-million.

The top three provinces visited as main destinations accounted for 53.5% (7.4-million) of all overnight trips. KwaZulu-Natal emerged as the leading main destination province, recording the highest number of overnight trips at 3.0-million (21%), followed by Limpopo with 2.4-million (17%) and Eastern Cape with 2.1-million (15%).

Gauteng, Western Cape and Mpumalanga each recorded over 1-million overnight trips

Northern Cape was the least visited province as a main destination, with 669k (5%) overnight trips, followed by the Free State with 872k (6%) and the North West with 986k (7%).

OVERNIGHT TRIPS BY DESTINATION PROVINCE: Q4 2025



PROVINCIAL PERFORMANCE

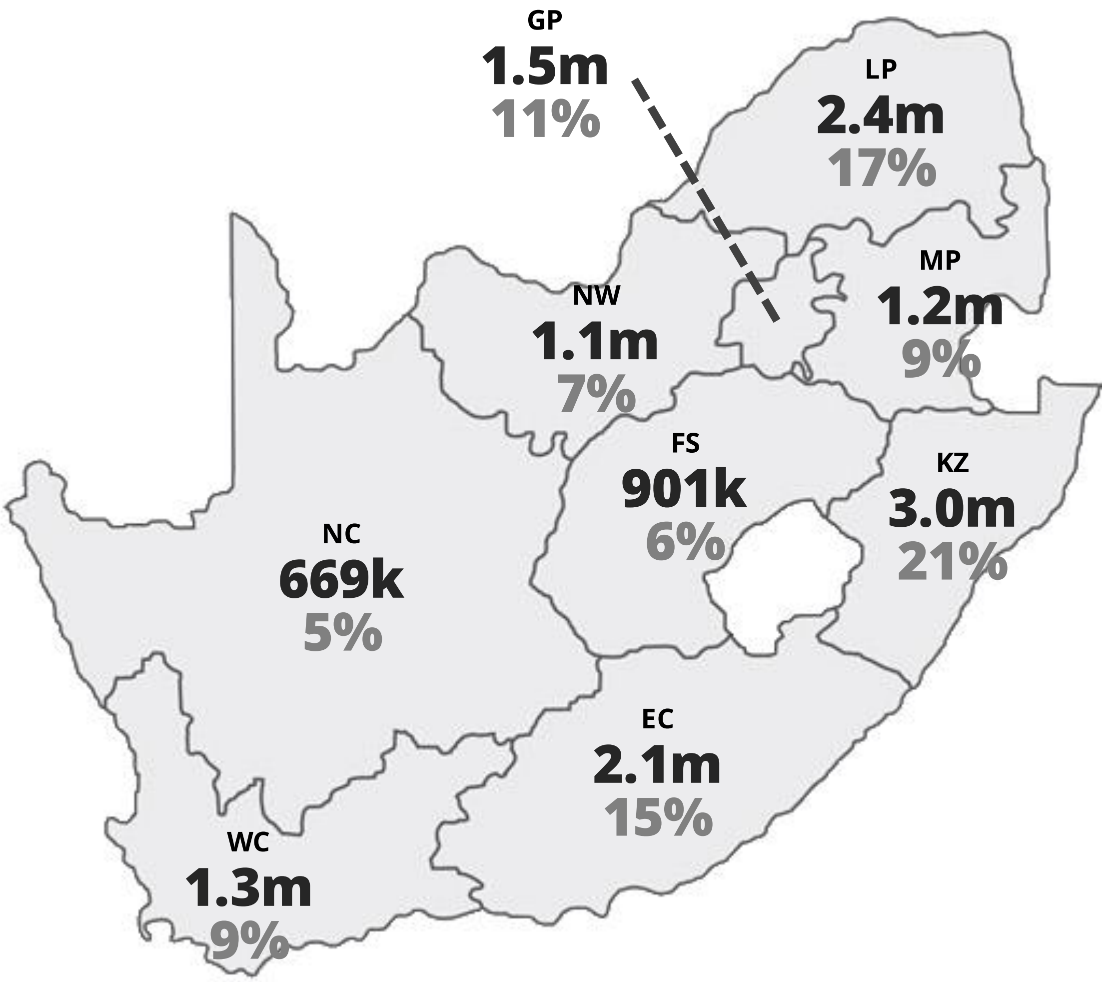
PROVINCES VISITED DURING STOPOVERS

In Q4 2025, the total number of overnight trips was 13.9-million. When including provinces visited during stopovers, where some form of economic activity occurred en route to the main destination, the total rises to 14.2-million visits.

Gauteng, KwaZulu-Natal, Limpopo, Mpumalanga, and North West recorded one-million or more visits, including economically active stopovers, overnight stays, and main-destination trips. The North West recorded 986k trips as a main destination and 1.1-million visits overall. Provinces with one-million or more visits accounted for 65% (9.3-million) of all visits.

Free State recorded 872k trips as a main destination and 901k visits overall. Eastern Cape, Northern Cape, and Western Cape did not record any stopover visits in Q4 2025.

PROVINCES VISITED: Q4 2025



INTRA- AND INTER-PROVINCE TRAVEL

In Q4 2025, the highest proportions of domestic trips taken by residents within their own provinces were recorded in the Western Cape (89.4%) and KwaZulu-Natal (74.9%).

Moderate levels of intra-provincial travel were observed in the Eastern Cape (43.1%), Limpopo (42.7%), the Northern Cape (42.1%) and Mpumalanga (41.7%)

Gauteng (23.3%), the Free State (34.5%), and the North West (36.1%) had the lowest proportions of intra-provincial travel.

Gauteng functioned primarily as a source province, contributing significantly to domestic tourism flows to several other provinces. The largest proportions of trips from Gauteng were to Limpopo (47.9%), Mpumalanga (47.5%), and the North West (42.1%). It also played a meaningful role in the domestic tourism figures for the Free State (26.4%) and the Northern Cape (24.1%).

Trips into Gauteng were largely driven by residents of KwaZulu-Natal (21.2%), Limpopo (18.4%), and Mpumalanga (15.5%). In addition to trips from residents of Gauteng, trips into the Free State were mainly driven by residents of KwaZulu-Natal (23.2%).

Combined inflows from the Western Cape (33.5%), Gauteng (12.5%) and the Free State (4.8%) accounted for 50.8% of domestic trips into the Eastern Cape.

INTRA- AND INTER-PROVINCE TRAVEL: Q4 2025
Proportion of Trips to Destination Province

DESTINATION PROVINCE

SOURCE PROVINCE

	EC	FS	GT	KZ	LM	MP	NC	NW	WC
EC	43.1%	0.0%	4.5%	1.6%	0.5%	0.0%	0.0%	0.0%	3.5%
FS	4.8%	34.5%	4.2%	4.5%	1.3%	1.0%	6.7%	2.8%	3.7%
GT	12.5%	26.4%	23.3%	9.5%	47.9%	47.5%	24.1%	42.1%	1.2%
KZ	0.8%	23.2%	21.2%	74.9%	0.0%	5.1%	0.0%	0.0%	0.0%
LM	0.0%	0.0%	18.4%	0.0%	42.7%	1.7%	0.0%	9.6%	0.0%
MP	1.7%	0.0%	15.5%	7.5%	5.3%	41.7%	0.0%	0.0%	0.0%
NC	2.2%	15.9%	2.3%	0.0%	2.3%	0.0%	42.1%	9.4%	0.9%
NW	1.4%	0.0%	9.0%	0.6%	0.0%	3.1%	27.0%	36.1%	1.3%
WC	33.5%	0.0%	1.5%	1.3%	0.0%	0.0%	0.0%	0.0%	89.4%

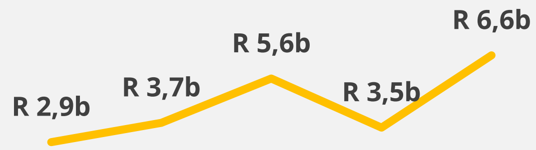
EASTERN CAPE **2.1m** +58.7%

DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS

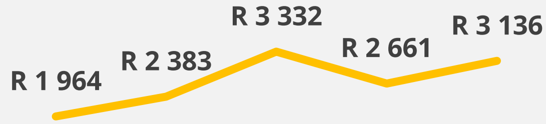
2.1m
+58.7%

OVERNIGHT SPEND



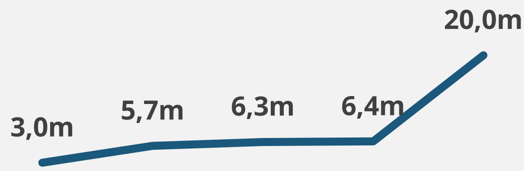
R 6.6b
+87.0%

AVERAGE OVERNIGHT SPEND



R 3,136
+17.8%

BEDNIGHTS



20.0m
+214.9%

LENGTH OF STAY

9.5
+98.4%

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 2.1m +58.7%

DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	563k	26.9%	+16.7%
VFR	1.2m	58.1%	+111.7%
PROFESSIONAL / BUSINESS	65k	3.1%	+273.2%
MICE	11k	0.5%	-84.7 %
MEDICAL	-	- %	- %
RELIGIOUS	56k	2.7%	-29.7%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.4b	21.0%	-30.7%
VFR	R 3.8b	58.3%	+288.3%
PROFESSIONAL / BUSINESS	R 868.3m	13.2%	+6143.9%
MICE	R 30.2m	0.5%	-84.2%
MEDICAL	R -	- %	- %
RELIGIOUS	R 148.0m	2.3%	+65.7%

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.

FREE STATE **872k** **+91.1%**

DESTINATION PROVINCE: FREE STATE

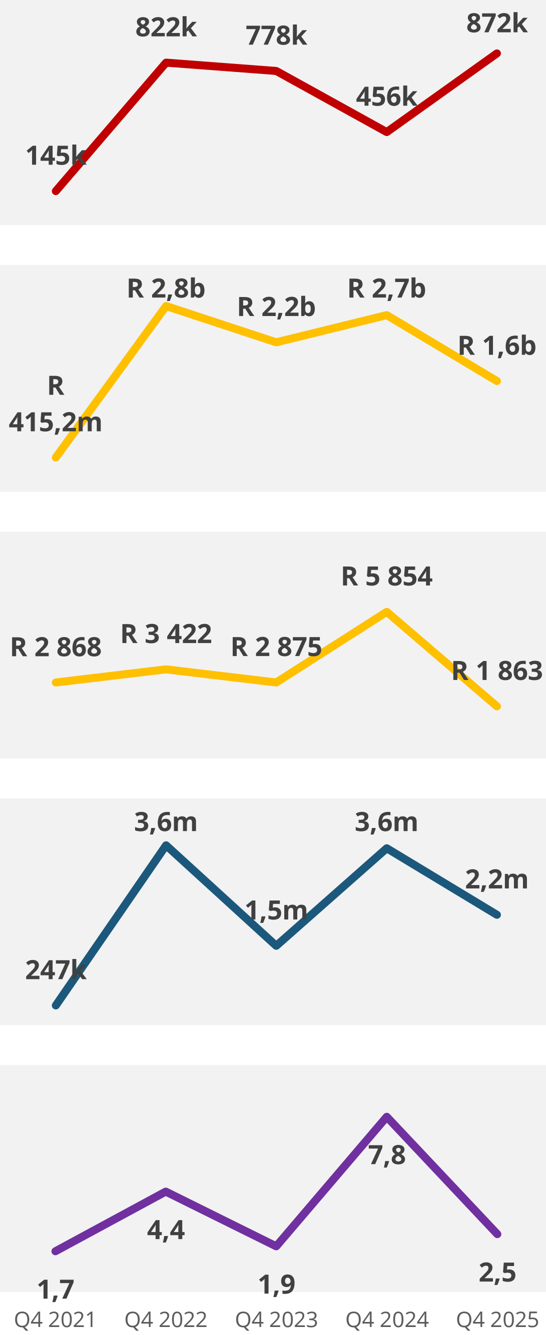
OVERNIGHT TRIPS — **872k** **+91.1%**

OVERNIGHT SPEND — **R 1.6b** **-39.2%**

AVERAGE OVERNIGHT SPEND — **R 1,863** **-68.2%**

BEDNIGHTS — **2.2m** **-39.3%**

LENGTH OF STAY — **2.5** **-68.3%**



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.

FREE STATE

827k +91.1%

DESTINATION PROVINCE: **FREE STATE**

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	279k	32.0%	+54.6%
VFR	273k	31.4%	+14.0%
PROFESSIONAL / BUSINESS	70k	8.0%	+365.0%
MICE	-	- %	- %
MEDICAL	-	- %	- %
RELIGIOUS	11k	2.7%	- %

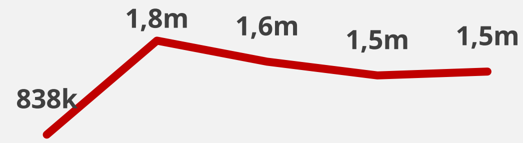
OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 651.7m	40.1%	-63.5%
VFR	R 557.7m	34.3%	-34.4%
PROFESSIONAL / BUSINESS	R 175.8m	10.8%	+689.3%
MICE	R -	- %	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 4.1m	0.3%	- %

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 **1.5m** **+2.8%**

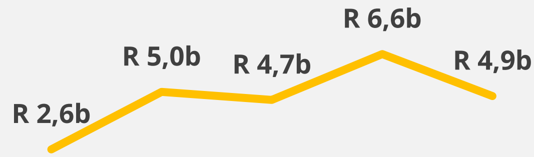
DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS



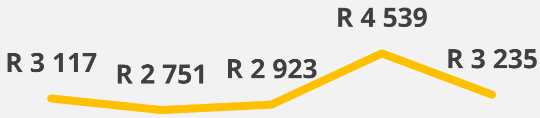
1.5m
+2.8%

OVERNIGHT SPEND



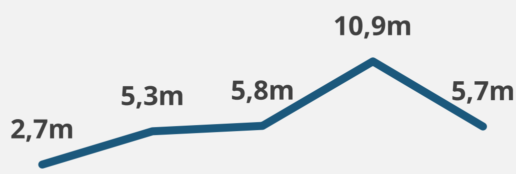
R 4.9b
-26.7%

AVERAGE OVERNIGHT SPEND



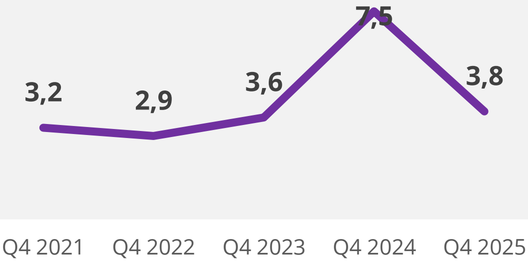
R 3,235
-28.7%

BEDNIGHTS



5.7m
-47.4%

LENGTH OF STAY



3.8
-48.8%

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

1.5m +2.8%

DESTINATION PROVINCE: GAUTENG

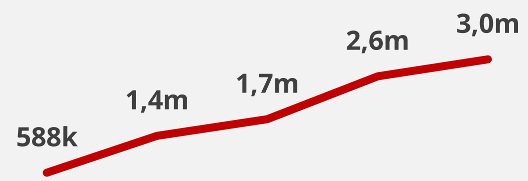
OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	352k	23.4%	-28.3%
VFR	870k	57.9%	+51.6%
PROFESSIONAL / BUSINESS	109k	7.3%	-7.5%
MICE	33k	2.2%	-1.9%
MEDICAL	-	- %	- %
RELIGIOUS	101k	6.7%	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.7b	34.5%	-18.1%
VFR	R 2.0b	41.7%	+1.6%
PROFESSIONAL / BUSINESS	R 604.2m	12.4%	-50.5%
MICE	R 258.9m	5.3%	-12.4%
MEDICAL	R -	- %	- %
RELIGIOUS	R 61.2m	1.3%	-45.0%

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.

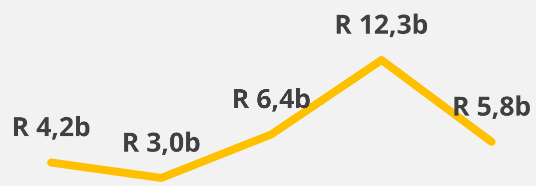
DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS



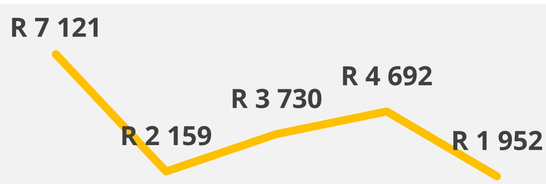
3.0m
+13.6%

OVERNIGHT SPEND



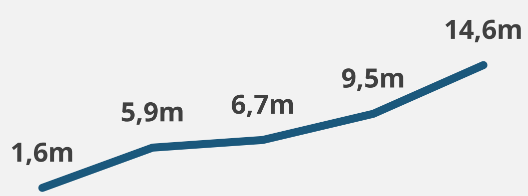
R 5.8b
-52.7%

AVERAGE OVERNIGHT SPEND



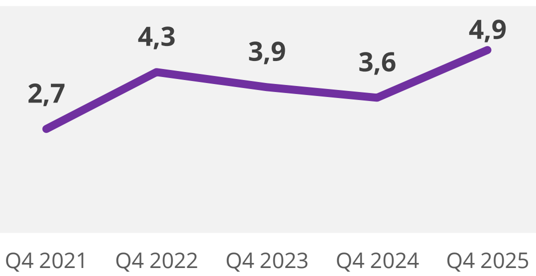
R 1,952
-58.4%

BEDNIGHTS



14.6m
+54.4%

LENGTH OF STAY



4.9
+36.0%

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.

KWAZULU-NATAL 3.0m +13.6%

DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	963k	32.3%	+19.8%
VFR	1.7m	56.2%	+58.1%
PROFESSIONAL / BUSINESS	99k	3.3%	-54.0%
MICE	-	- %	- %
MEDICAL	-	- %	- %
RELIGIOUS	210k	7.1%	-1.6%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 2.9b	49.7%	-58.3%
VFR	R 2.2b	37.6%	+3.6%
PROFESSIONAL / BUSINESS	R 97.7m	1.7%	-79.3%
MICE	R -	- %	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 351.4m	6.0%	-29.0%

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.

LIMPOPO

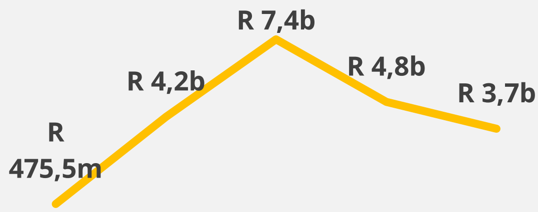
2.4m +71.5%

DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS

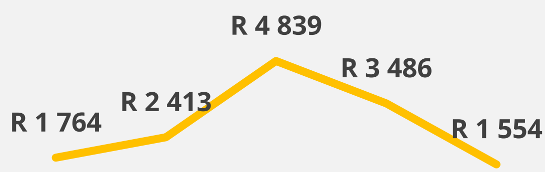
2.4m
+71.5%

OVERNIGHT SPEND



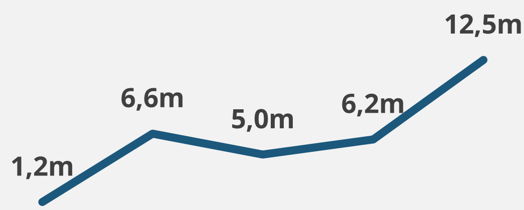
R 3.7b
-23.5%

AVERAGE OVERNIGHT SPEND



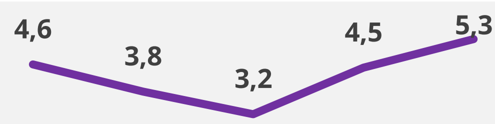
R 1,554
-55.4%

BEDNIGHTS



12.5m
+101.3%

LENGTH OF STAY



5.3
+17.3%

Q4 2021 Q4 2022 Q4 2023 Q4 2024 Q4 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.

LIMPOPO

2.4m +71.5%

DESTINATION PROVINCE: **LIMPOPO**

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	696k	29.5%	+9.8%
VFR	1.1m	46.7%	+100.9%
PROFESSIONAL / BUSINESS	424k	18.0%	+711.5%
MICE	17k	0.7%	- %
MEDICAL	-	- %	- %
RELIGIOUS	74k	3.2%	+80.2%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.2b	32.3%	-58.2%
VFR	R 1.4b	37.7%	+145.8%
PROFESSIONAL / BUSINESS	R 914.4m	24.9%	-16.2%
MICE	R 67.6m	1.8%	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 60.1m	1.6%	+45.6%

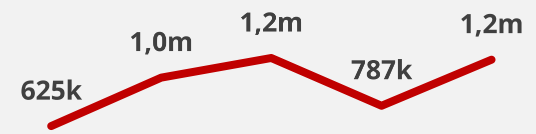
Key growth and change rates shown in this report are in comparison to 2024.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

MPUMALANGA

1.2m +46.3%

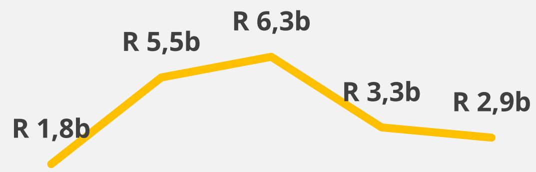
DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS



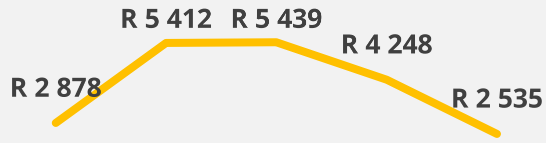
1.2m
+46.3%

OVERNIGHT SPEND



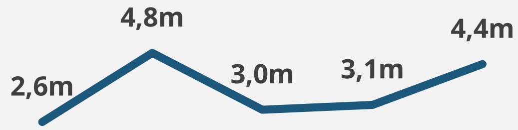
R 2.9b
-12.7%

AVERAGE OVERNIGHT SPEND



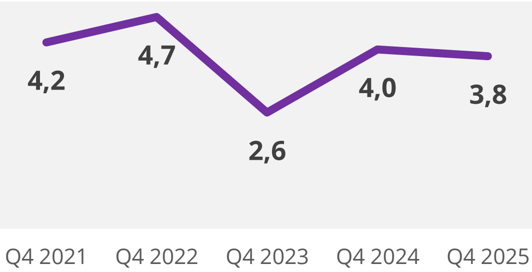
R 2,535
-40.3%

BEDNIGHTS



4.4m
+40.7%

LENGTH OF STAY



3.8
-3.8%

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MPUMALANGA 1.2m +46.3%

DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	525k	45.6%	+95.7%
VFR	441k	38.3%	+90.6%
PROFESSIONAL / BUSINESS	23k	2.0%	-69.0%
MICE	-	- %	- %
MEDICAL	-	- %	- %
RELIGIOUS	162k	14.1%	+21.8%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 2.0b	68.6%	+107.5%
VFR	R 640.8m	22.0%	-42.8%
PROFESSIONAL / BUSINESS	R 47.3m	1.6%	-82.5%
MICE	R -	- %	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 227.8m	7.8%	-37.8%

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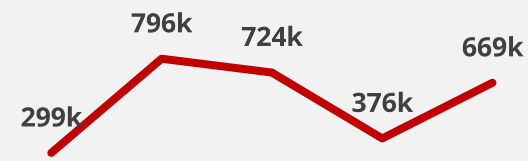
NORTHERN CAPE **669k** +78.1%

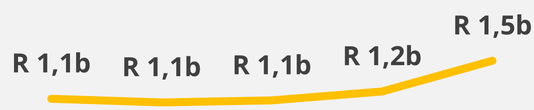
DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS



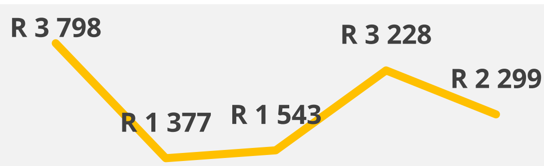
669k
+78.1%

OVERNIGHT SPEND



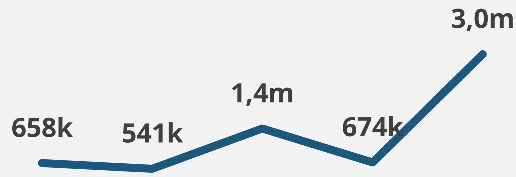
R 1.5b
+26.8%

AVERAGE OVERNIGHT SPEND



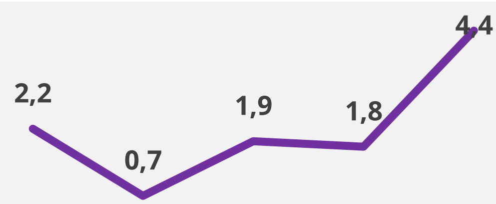
R 2,299
-28.8%

BEDNIGHTS



3.0m
+339.2%

LENGTH OF STAY



4.4
+146.6%

Q4 2021 Q4 2022 Q4 2023 Q4 2024 Q4 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.

NORTHERN CAPE 669k +78.1%

DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	105k	15.7%	-33.4%
VFR	447k	66.7%	+590.7%
PROFESSIONAL / BUSINESS	-	- %	- %
MICE	-	- %	- %
MEDICAL	58k	8.7%	- %
RELIGIOUS	-	- %	- %

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 323.9m	21.0%	-2.5%
VFR	R 1.2b	76.8%	-412.0%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R -	- %	- %
MEDICAL	R 17.5m	1.1%	- %
RELIGIOUS	R -	- %	- %

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.

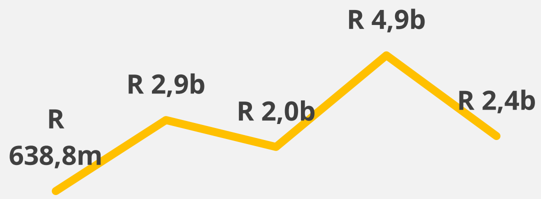
NORTH WEST 986k +3.8%

DESTINATION PROVINCE: NORTH WEST

OVERNIGHT TRIPS

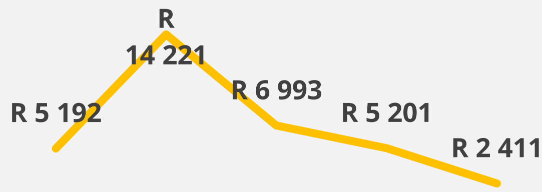
986k
+3.8%

OVERNIGHT SPEND



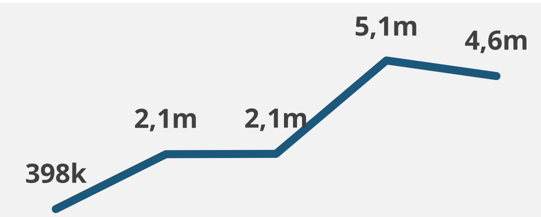
R 2.4b
-51.9%

AVERAGE OVERNIGHT SPEND



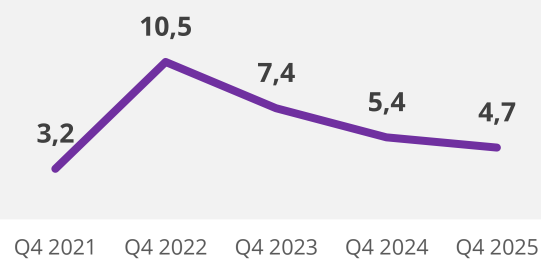
R 2,411
-53.6%

BEDNIGHTS



4.6m
-9.6%

LENGTH OF STAY



4.7
-12.9%

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NORTH WEST

986k +3.8%

DESTINATION PROVINCE: NORTH WEST

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	261k	26.5%	-47.1%
VFR	632k	64.1%	+66.0%
PROFESSIONAL / BUSINESS	-	- %	- %
MICE	-	- %	- %
MEDICAL	22k	2.3%	- %
RELIGIOUS	17k	1.7%	-40.0%

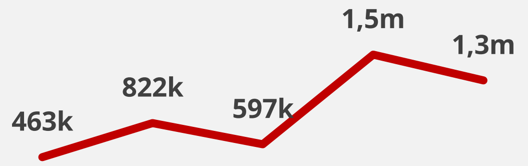
OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.4b	58.9%	-60.2%
VFR	R 821.3m	34.6%	-37.2%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R -	- %	- %
MEDICAL	R 66.9m	2.8%	- %
RELIGIOUS	R 22.3m	0.9%	-56.6%

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.

WESTERN CAPE **1.3m** **-17.6%**

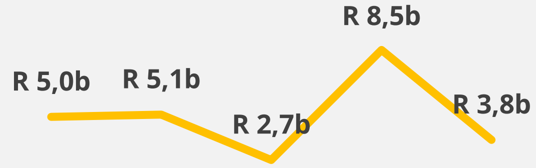
DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS



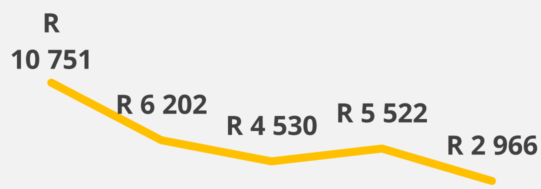
1.3m
-17.6%

OVERNIGHT SPEND



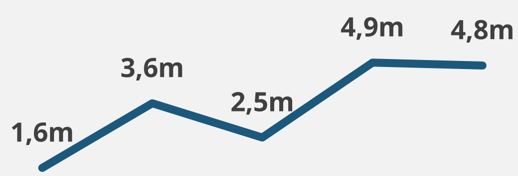
R 3.8b
-55.8%

AVERAGE OVERNIGHT SPEND



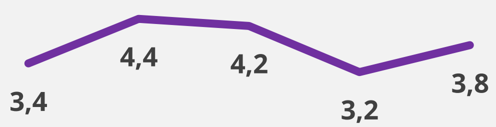
R 2,966
-46.3%

BEDNIGHTS



4.8m
-1.9%

LENGTH OF STAY



3.8
+19.2%

Q4 2021 Q4 2022 Q4 2023 Q4 2024 Q4 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.

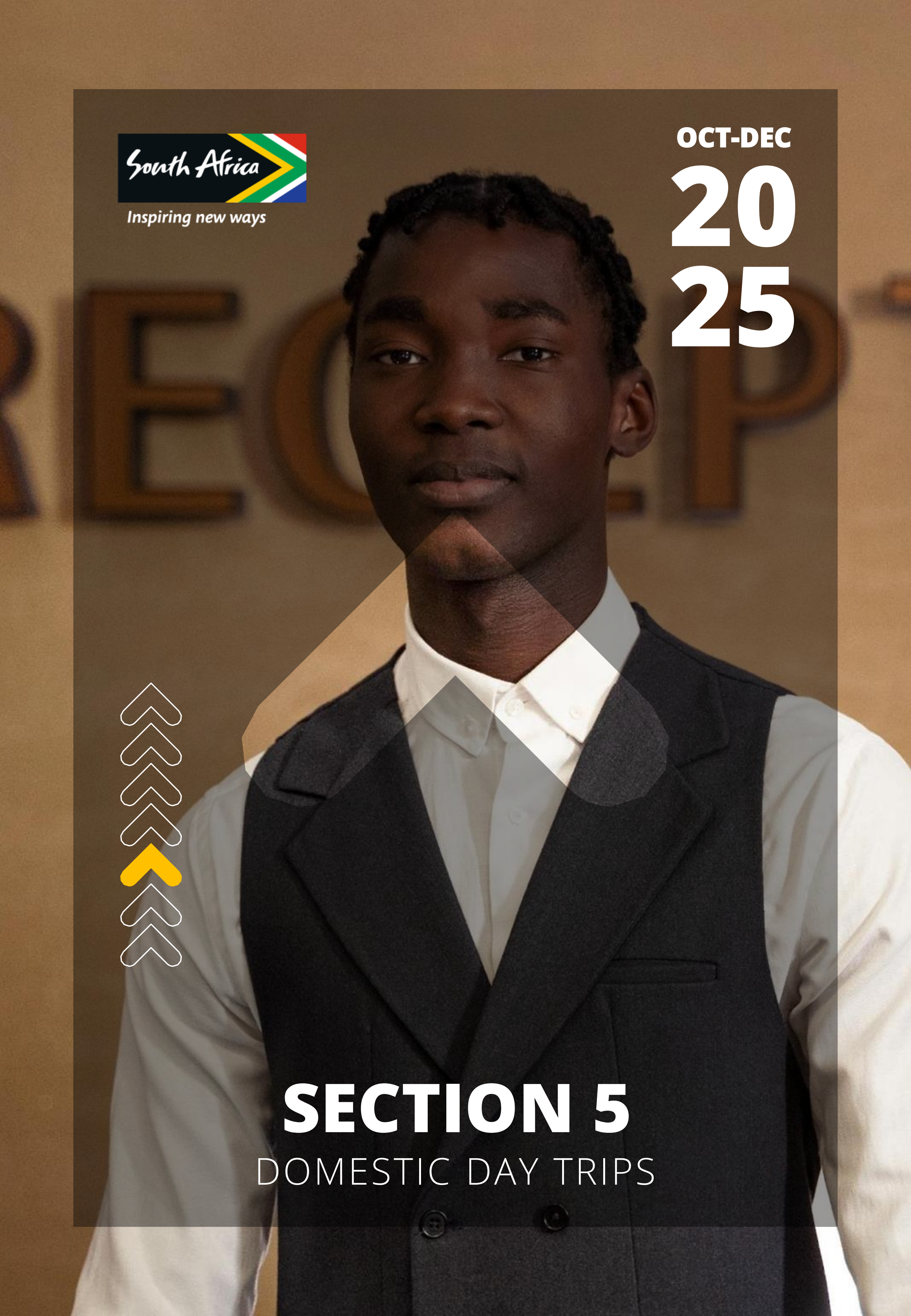
WESTERN CAPE 1.3m -17.6%

DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	613k	48.3%	-9.5%
VFR	356k	28.1%	-54.3%
PROFESSIONAL / BUSINESS	123k	9.7%	- %
MICE	-	- %	- %
MEDICAL	-	- %	- %
RELIGIOUS	53k	4.2%	+62.3%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 2.8b	74.2%	-45.5%
VFR	R 497.8m	13.2%	-83.9%
PROFESSIONAL / BUSINESS	R 377.8m	10.0%	- %
MICE	R -	- %	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 14.9m	0.4%	-90.9%

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.



Inspiring new ways

OCT-DEC
2025

SECTION 5

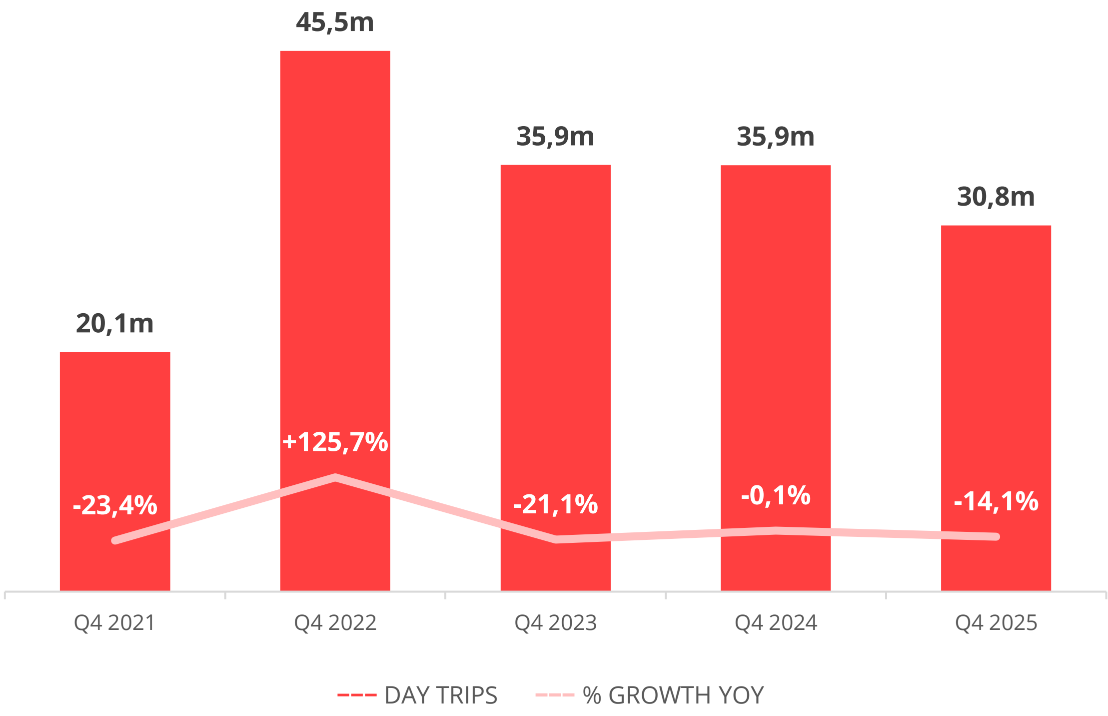
DOMESTIC DAY TRIPS

DAY TRIPS **30.8m** -14.1%

The total number of domestic day trips declined by -14.1%, dropping from 35.9-million in Q4 2024 to 30.8-million in Q4 2025.

In the fourth quarter of 2025, while day trips declined, overnight trips increased (+27.5%). It is possible that travellers chose fewer but longer (overnight) trips instead of multiple day trips to save on transport costs.

DAY TRIPS: Q4 2021 – Q4 2025



DAY TRIPS 30.8m -14.1%

In Q4 2025, the primary purposes for day trips were visiting friends and relatives (VFR), holiday trips, and personal shopping.

VFR increased to 12.1-million day trips (+17.4%) and accounted for 39.3% of total day trips. Holiday trips declined by -28.7%, dropping to 6.7-million trips, with a share of 21.7% of total day trips compared to Q4 2024.

Personal shopping trips declined by 14.3%, falling to 5.1-million trips and representing 16.6% of total day trips.

Day trips for professional or business purposes experienced a moderate increase to 2.5-million, while MICE day trips reached 1-million (+37.9%).

It is important to note the increase in VFR trips in Q4 2025: day trips rose by +17.4% and overnight trips by +59.1%.

DAY TRIPS BY PURPOSE: Q4 2024 v Q4 2025

Purpose	Q4 2024	Q4 2025	Change
VFR	10.3m 28.7%	12.1m 39.3%	+17.4%
HOLIDAY	9.4m 26.1%	6.7m 21.7%	-28.7%
PERSONAL SHOPPING	6.0m 16.6%	5.1m 16.6%	-14.3%
PROFESSIONAL / BUSINESS	2.4m 6.8%	2.5m 8.1%	+3.0%
RELIGIOUS	1.5m 4.3%	1.3m 4.1%	-17.8%
MICE	759k 2.1%	1.0m 3.4%	+37.9%

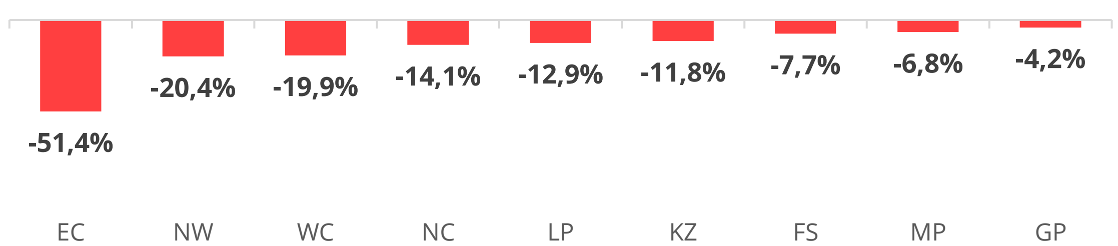
DAY TRIPS 30.8m -14.1%

In Q4 2025, **the total number of domestic day trips declined by -14.1% falling to 30.8-million.** The decline occurred across all source provinces for day trips.

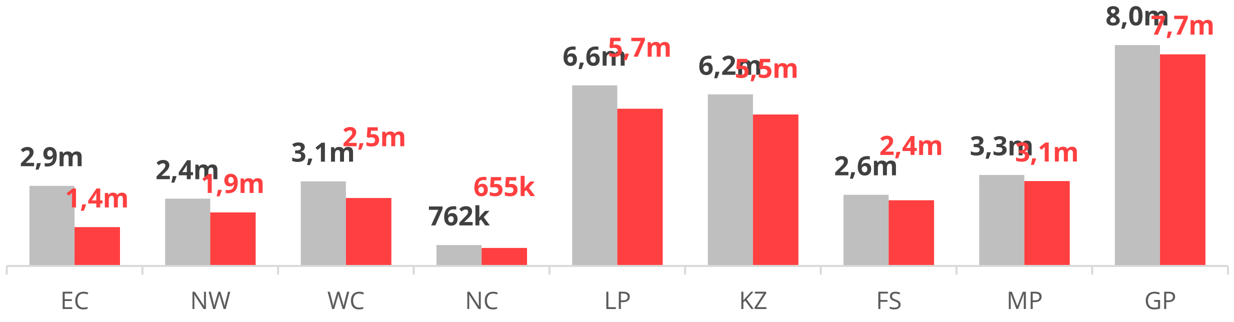
The Eastern Cape recorded the steepest decline as a source province for day trips, falling -51.4% from 2.9-million to 1.4-million day trips. This was followed by the North West (-20.4%) and the Western Cape (-19.9%), with the remaining provinces declining between -14.1% and -4.2%.

Mirroring Q4 2024, the largest numbers of day trips originating from a source province in Q4 2025 were recorded in Gauteng (7.7-million), Limpopo (5.7-million), and KwaZulu-Natal (5.5-million).

SOURCE PROVINCE GROWTH RATE: Q4 2024 v Q4 2025



DAY TRIPS FROM SOURCE PROVINCE: Q4 2024 v Q4 2025



DAY TRIPS

30.8m -14.1%

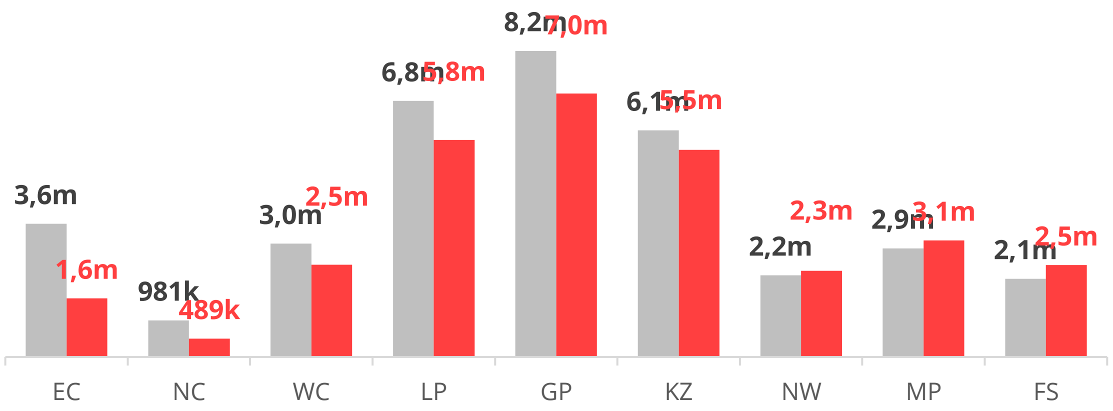
Only Mpumalanga (+7.4%), the Free State (+17.4%), and the North West (+5.4%) experienced growth as destination provinces for day trips in Q4 2025. Mpumalanga grew from 2.9-million to 3.1-million day trips.

The six remaining provinces all experienced declines as destination provinces for day trips in Q4 2025.

Similar to the trend in Q4 2024, in Q4 2025 Gauteng had the highest number of day trips as a destination province, declining from 8.2-million to 7.0-million. Limpopo decreased from 6.8-million to 5.8-million, and KwaZulu-Natal fell from 6.1-million to 5.5-million.

The Eastern Cape, which had experienced growth in Q4 2024, declined by -56.0% falling from 3.6-million to 1.6-million day trips in Q4 2025. The Northern Cape remained the least frequented destination for day trips and alarmingly declined by -50.1%, falling to 489k trips.

DAY TRIPS TO DESTINATION PROVINCE: Q4 2024 v Q4 2025

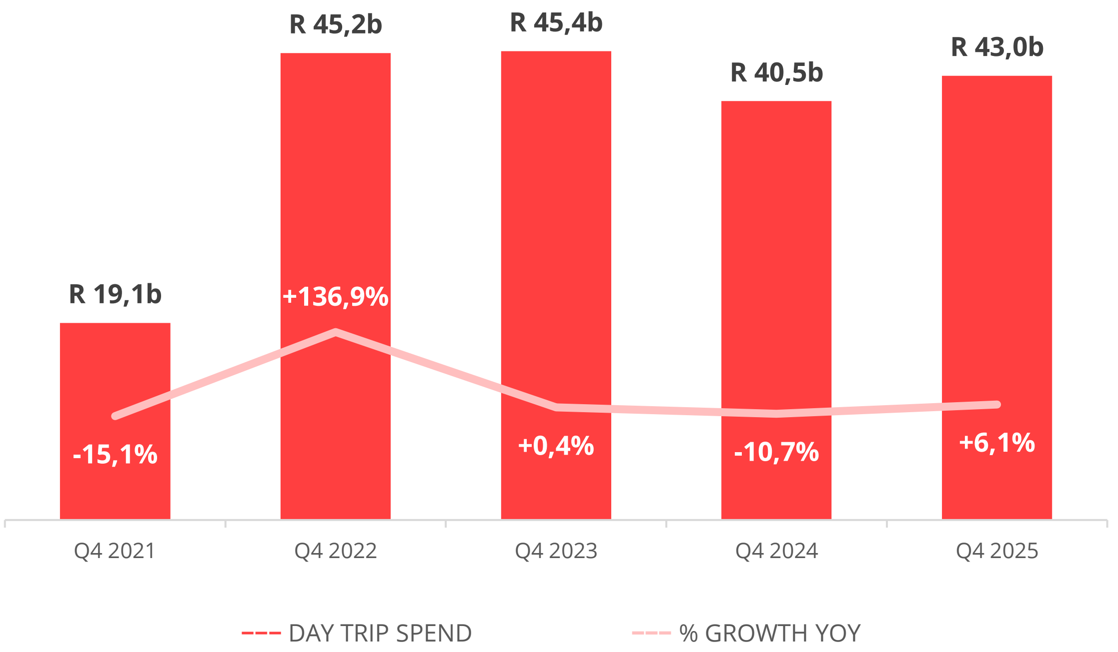


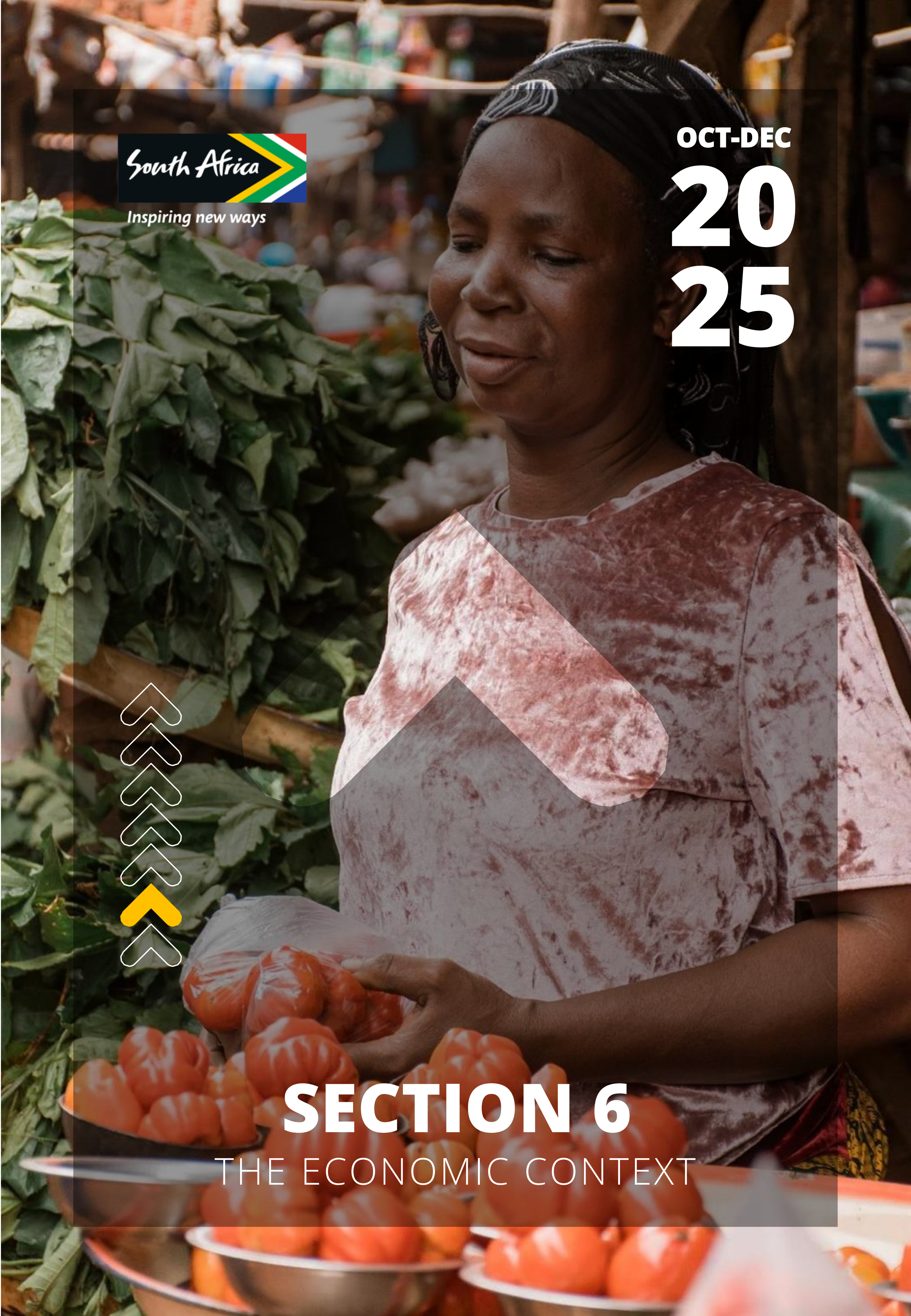
DAY TRIPS

30.8m -14.1%

Domestic day trip spending grew by +6.1%, rising from R40.5-billion in Q4 2024 to R43.0-billion in Q4 2025. Despite this increase, it remains below the day trip spend of R45.4-billion recorded in Q4 2023.

DAY TRIP SPEND: Q4 2021 – Q4 2025





OCT-DEC

2025

SECTION 6

THE ECONOMIC CONTEXT

THE ECONOMIC CONTEXT

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

GDP

South Africa's economy expanded 1.8% in Q4 2025, according to Statistics South Africa. This figure exceeded the projected 1.2% growth forecast by leading financial institutions.[1] The quarterly expansion reflects broad-based improvements in several sectors, including: services (grew +1.9%), manufacturing (+2.3% in Q4), household consumption (spending increased), agriculture (+0.7% increase) and mining (output grew slightly).

INFLATION | 3.6%

Annual consumer price inflation was 3.6% in December 2025, up from 3.5% in November 2025. The CPI increased by 0.2% month-on-month in December 2025.[2]

UNEMPLOYMENT RATE | 31.4%

South Africa's unemployment rate fell to 31.4% in Q4 2025, from 31.9% in the previous period, marking the second consecutive decline this year. The youth unemployment rate (15 and 24 years old), eased slightly to 57% in Q4 from 58.5% in Q3.[3]

PRIME INTEREST RATE: REPO RATE | 6.75%

The South African Reserve Bank cut the repo rate by 25 basis points to 6.75% in November 2025.[4]

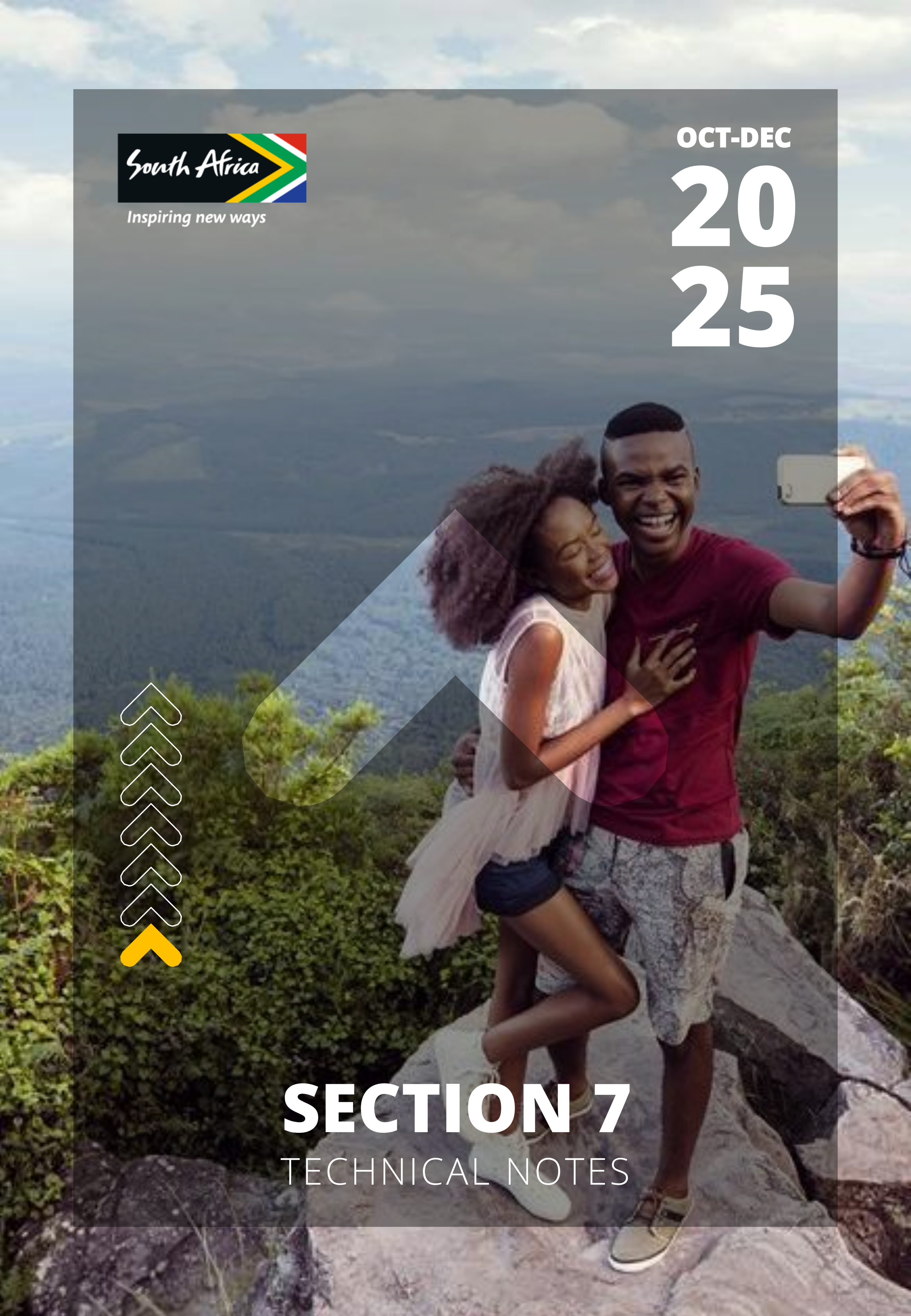
PETROL PRICE | R21.41 /litre

The Minister of Mineral and Petroleum Resources announced the adjustment of the fuel prices with effect from Wednesday, 03 December 2025. The increase means that a litre of Petrol 95 (ULP & LRP) now costs R21.41 (inland prices), while a litre of Petrol 95 (ULP & LRP) in the coast now costs R 20.58.[5]

HOUSEHOLD DEBT-TO-INCOME | 61.6%

South African household debt as a percentage of nominal disposable income edged lower to 61.6% in the third quarter of 2025, as household debt increased at a slightly slower pace than nominal disposable income. Households' cost of servicing debt fell to 8.5% from 8.7% over this period.[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 Q4 2025.

PROVINCE	QUARTERLY SAMPLE	ACHIEVED SAMPLE	COMPLETION RESPONSE RATE
Eastern Cape (EC)	468	468	100%
Free State (FS)	288	288	100%
Gauteng (GP)	1,040	1,040	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 **October, November, and December 2025** surveys have been used to **weight** the **quarterly sample** so that it can be extrapolated to the adult population of South Africa. The development of the weights follows the multi-stage, stratified sample design.

DESIGN WEIGHTS

The design weight is the weight assigned to each household or respondent to account for their probability of being selected in the sample. It is calculated as the inverse of the inclusion probability, ensuring that individuals with a lower chance of selection are appropriately weighted to represent the population accurately. The DTS survey was designed using a three-stage sampling process. Therefore, a weighting component must be calculated based on the inclusion probability of a unit at each stage. The overall design weight for each respondent is obtained by combining the weights from all three stages.

Stage 1: Develop EA weights

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

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

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

Stage 2: Develop Household weights

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

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

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

Continued...

WEIGHTING

Stage 3: Develop Respondent weights

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

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

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

Since there are large differences in the number of persons, aged 18 years and older, per household, which may cause large deviations in the weights, the average number of persons aged 18 years and older in the households of an EA is used in the weighting process.

NON-RESPONSES

For this study the design weights of the respondents are adjusted to compensate for differential non-response (i.e. under-representation of certain parts of the population).

CALIBRATION

Calibration is a process used in survey weighting to adjust design weights so that the final weighted sample matches known population totals for key demographic variables. The design weights of the respondents are benchmarked to the estimated 18 years and older population figures, based on the **2025 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		
		Q4 2023	Q4 2024	Q4 2025
Travel Month	October	24.9%	26.4%	36.0%
	November	29.2%	30.7%	23.1%
	December	45.9%	42.9%	40.9%

SHARE OF OVERNIGHT TRIPS, BY MONTH

		Overnight Trips		
		Q4 2023	Q4 2024	Q4 2025
Travel Month	October	24.5%	26.8%	35.3%
	November	30.4%	30.9%	23.2%
	December	45.1%	42.3%	41.6%

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APPENDIX B

PURPOSE OF TRIP BY SOCIO-DEMOGRAPHIC INDICATORS

APPENDIX B
PURPOSE OF TRIP BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY PURPOSE

		Q4 2023			Q4 2024			Q4 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	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%
	Some primary school	7.9%	2.1%	0.0%	0.7%	0.6%	0.0%	2.1%	1.9%	0.0%
	Primary school completed	2.3%	9.1%	0.0%	2.6%	2.1%	0.0%	3.2%	0.0%	0.0%
	Some high school	26.0%	7.1%	0.0%	22.4%	19.6%	12.1%	29.9%	18.3%	0.0%
	High school completed	40.6%	28.6%	18.7%	53.2%	34.0%	58.2%	42.7%	45.0%	0.0%
	Some college	3.9%	7.1%	0.0%	1.5%	6.2%	0.0%	3.0%	5.7%	0.0%
	College completed	5.6%	5.9%	79.2%	4.6%	11.7%	5.4%	6.6%	11.2%	27.6%
	Some university	2.0%	4.8%	0.0%	2.7%	4.2%	20.5%	1.0%	4.1%	0.0%
	Technikon diploma / degree	6.0%	8.9%	0.0%	2.8%	5.2%	0.0%	2.6%	3.6%	35.8%
	University degree / diploma	3.3%	13.8%	2.0%	7.9%	15.1%	0.0%	7.8%	5.4%	18.5%
	Post-graduate degree	1.3%	12.5%	0.0%	1.6%	1.3%	3.8%	0.7%	4.8%	18.1%
	Refused / Unknown	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Male	54.4%	50.4%	98.0%	42.7%	52.4%	50.0%	42.1%	55.1%	100.0%
	Female	45.6%	49.6%	2.0%	57.3%	47.6%	50.0%	57.9%	44.9%	0.0%
Marital Status	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Single / Never married	62.8%	50.0%	23.2%	50.6%	46.1%	45.8%	64.8%	69.4%	81.9%
	Married / Living together	26.9%	45.7%	76.8%	35.3%	44.5%	33.7%	26.7%	24.5%	0.0%
	Divorced / Widowed / Separated	10.3%	4.3%	0.0%	14.1%	9.3%	20.5%	8.4%	6.0%	18.1%
	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	24.9%	29.7%	23.2%	27.4%	23.3%	9.0%	27.2%	43.7%	81.9%
	Children, dependent	53.7%	52.2%	76.8%	51.3%	64.3%	85.4%	57.0%	39.7%	0.0%
	Children, independent	11.6%	7.4%	0.0%	9.9%	10.4%	5.5%	12.3%	13.3%	18.1%
	Children, dependent + independen	9.8%	10.7%	0.0%	11.5%	2.1%	0.0%	3.5%	3.3%	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	4.7%	2.9%	0.0%	5.4%	3.1%	0.0%	5.9%	3.6%	0.0%
	R501 - R750	2.2%	3.0%	18.7%	0.8%	2.2%	0.0%	1.3%	1.5%	0.0%
	R751 - R1,000	3.8%	1.5%	0.0%	3.2%	1.5%	0.0%	5.3%	0.5%	0.0%
	R1,001 - R1,500	4.9%	1.4%	0.0%	6.6%	4.5%	22.1%	2.8%	3.2%	0.0%
	R1,501 - R2,000	12.9%	6.1%	0.0%	5.6%	4.5%	0.0%	9.0%	5.8%	0.0%
	R2,001 - R3,000	18.5%	2.3%	0.0%	8.4%	9.0%	0.0%	16.8%	11.0%	0.0%
	R3,001 - R5,000	13.1%	9.0%	0.0%	10.0%	10.9%	9.7%	10.3%	13.0%	0.0%
	R5,001 - R7,500	10.4%	9.8%	0.0%	5.9%	8.0%	14.1%	9.5%	12.7%	0.0%
	R7,501 - R10,000	2.7%	7.0%	0.0%	12.5%	6.8%	17.6%	6.7%	6.4%	0.0%
	R10,001 - R15,000	6.1%	9.4%	74.7%	2.3%	5.4%	0.0%	3.2%	1.6%	18.1%
	R15,001 - R20,000	4.9%	4.9%	0.0%	1.6%	7.3%	0.0%	3.1%	8.1%	0.0%
	R20,001 - R30,000	4.1%	11.9%	6.6%	1.9%	2.3%	24.4%	2.9%	4.0%	27.6%
	R30,001+	4.0%	12.8%	0.0%	5.9%	9.0%	0.0%	2.2%	8.2%	0.0%
	Refused to answer	4.9%	6.5%	0.0%	15.0%	18.1%	9.0%	15.7%	15.1%	54.3%
	Don't Know / Uncertain	0.7%	10.2%	0.0%	10.2%	2.8%	3.2%	3.8%	3.6%	0.0%
	No income	2.1%	1.4%	0.0%	4.8%	4.6%	0.0%	1.7%	1.4%	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	19.1%	13.5%	18.7%	13.4%	14.4%	22.1%	17.7%	25.7%	63.5%
	25 - 34	26.2%	34.0%	79.2%	19.2%	38.8%	17.0%	24.4%	29.7%	0.0%
	35 - 44	24.2%	29.7%	2.0%	26.6%	17.2%	5.3%	30.8%	17.2%	18.5%
	45 - 54	11.9%	6.7%	0.0%	16.5%	19.1%	41.5%	11.2%	11.7%	0.0%
	55+	18.6%	16.1%	0.0%	24.2%	10.4%	14.0%	16.0%	15.7%	18.1%

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APPENDIX C

OVERNIGHT TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY OVERNIGHT TRIPS

		Overnight Trips		
		Q4 2023	Q4 2024	Q4 2025
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	0.3%	0.0%	0.7%
	Some primary school	3.7%	0.8%	2.0%
	Primary school completed	4.4%	2.0%	1.6%
	Some high school	15.0%	24.5%	26.9%
	High school completed	36.2%	41.2%	43.9%
	Some college	5.3%	4.4%	3.6%
	College completed	7.8%	7.3%	8.7%
	Some university	5.2%	3.7%	1.9%
	Technikon diploma / degree	7.1%	4.0%	2.6%
	University degree / diploma	9.2%	10.6%	6.0%
	Post-graduate degree	5.7%	1.5%	2.1%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	59.3%	49.8%	51.1%
	Female	40.7%	50.2%	48.9%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	54.3%	50.8%	64.6%
	Married / Living together	40.2%	36.0%	26.8%
	Divorced / Widowed / Separated	5.5%	13.2%	8.5%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	29.9%	24.9%	30.3%
	Children, dependent	52.4%	58.7%	52.4%
	Children, independent	9.2%	9.5%	13.5%
	Children, dependent + independen	8.5%	6.9%	3.8%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	3.7%	4.0%	5.6%
	R501 - R750	3.4%	1.2%	1.4%
	R751 - R1,000	2.2%	3.6%	4.1%
	R1,001 - R1,500	5.9%	7.5%	2.9%
	R1,501 - R2,000	7.1%	4.3%	6.4%
	R2,001 - R3,000	9.1%	10.3%	13.7%
	R3,001 - R5,000	8.7%	9.2%	11.1%
	R5,001 - R7,500	12.3%	6.0%	10.5%
	R7,501 - R10,000	4.2%	10.1%	7.2%
	R10,001 - R15,000	9.3%	3.7%	2.7%
	R15,001 - R20,000	5.4%	4.4%	5.7%
	R20,001 - R30,000	8.7%	3.7%	3.2%
	R30,001+	7.7%	6.3%	4.1%
	Refused to answer	5.5%	15.9%	14.7%
	Don't Know / Uncertain	5.5%	5.4%	4.7%
	No income	1.5%	4.5%	1.9%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	16.0%	14.0%	19.0%
	25 - 34	28.2%	28.8%	27.7%
	35 - 44	29.0%	22.3%	23.7%
	45 - 54	9.3%	18.1%	13.0%
	55+	17.5%	16.9%	16.5%

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APPENDIX D

DAY TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY DAY TRIPS

		Day Trips		
		Q4 2023	Q4 2024	Q4 2025
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	0.2%	1.5%	0.8%
	Some primary school	1.4%	5.5%	4.5%
	Primary school completed	3.7%	4.9%	1.2%
	Some high school	26.5%	23.3%	24.0%
	High school completed	39.6%	39.0%	45.0%
	Some college	3.4%	3.3%	4.3%
	College completed	11.6%	6.9%	6.5%
	Some university	2.0%	5.1%	2.1%
	Technikon diploma / degree	4.7%	2.3%	4.5%
	University degree / diploma	5.8%	6.9%	5.6%
	Post-graduate degree	1.2%	1.2%	1.4%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	55.2%	48.3%	52.2%
	Female	44.8%	51.7%	47.8%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	61.5%	58.7%	64.2%
	Married / Living together	33.2%	30.2%	25.9%
	Divorced / Widowed / Separated	5.3%	11.2%	9.9%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	29.6%	25.5%	26.3%
	Children, dependent	54.4%	54.6%	58.7%
	Children, independent	12.7%	13.6%	12.6%
	Children, dependent + independen	3.3%	6.3%	2.4%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	9.2%	7.7%	5.7%
	R501 - R750	1.9%	2.0%	4.5%
	R751 - R1,000	4.3%	6.4%	6.4%
	R1,001 - R1,500	6.1%	6.8%	7.6%
	R1,501 - R2,000	7.4%	9.4%	6.9%
	R2,001 - R3,000	12.0%	12.3%	13.9%
	R3,001 - R5,000	13.3%	12.8%	9.8%
	R5,001 - R7,500	11.9%	7.5%	8.7%
	R7,501 - R10,000	7.1%	5.0%	6.7%
	R10,001 - R15,000	8.7%	6.2%	3.9%
	R15,001 - R20,000	5.7%	2.9%	3.0%
	R20,001 - R30,000	3.3%	2.6%	2.9%
	R30,001+	3.6%	2.9%	2.8%
	Refused to answer	2.6%	10.7%	11.2%
	Don't Know / Uncertain	1.2%	1.2%	2.7%
	No income	1.7%	3.5%	3.3%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	17.1%	16.4%	17.5%
	25 - 34	28.0%	26.0%	26.4%
	35 - 44	25.4%	24.8%	25.7%
	45 - 54	12.1%	15.2%	13.9%
	55+	17.5%	17.6%	16.5%

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APPENDIX E

SHARE OF TRANSPORT USED TO TRAVEL TO DESTINATION

APPENDIX E

SHARE OF TRANSPORT USED TO TRAVEL TO DESTINATION

SHARE OF TRANSPORT TYPE

		Share of Transport Type		
		Q4 2023	Q4 2024	Q4 2025
Main Transport to Destination	Minibus taxi	24.4%	38.1%	32.9%
	Another car / van / bakkie	16.8%	22.8%	27.0%
	My car / van / bakkie	42.0%	22.7%	26.1%
	Tour bus	2.5%	0.4%	4.3%
	Commercial bus	5.4%	6.8%	5.0%
	Aeroplane	4.6%	2.2%	1.7%
	Rental car	3.7%	0.8%	0.5%
	Other	0.5%	1.2%	0.4%
	Truck / lorry	0.9%	0.0%	1.1%

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APPENDIX F

SHARE OF BEDNIGHTS BY ACCOMMODATION TYPE

APPENDIX F
SHARE OF BEDNIGHTS BY ACCOMMODATION TYPE

SHARE OF TOTAL BEDNIGHTS, BY ACCOMMODATION TYPE

		Share of Total Bednights		
		Q4 2023	Q4 2024	Q4 2025
Accommodation Type	Friends / Relatives	60.7%	62.4%	78.6%
	Guest House	10.7%	11.7%	5.8%
	Hotel	8.5%	6.0%	4.9%
	Other Accommodation	2.8%	0.4%	1.8%
	Self-Catering	3.6%	2.6%	1.3%
	Halls	1.4%	0.3%	0.4%
	B&B	2.8%	0.9%	2.0%
	Lodge	4.4%	4.3%	1.1%
	Hospital	0.0%	0.1%	0.2%
	AirBnB	2.1%	0.3%	0.9%
	Camping	2.5%	0.7%	1.4%
	Holiday Home	0.7%	10.2%	1.3%
	Hostel	0.0%	0.1%	0.1%

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