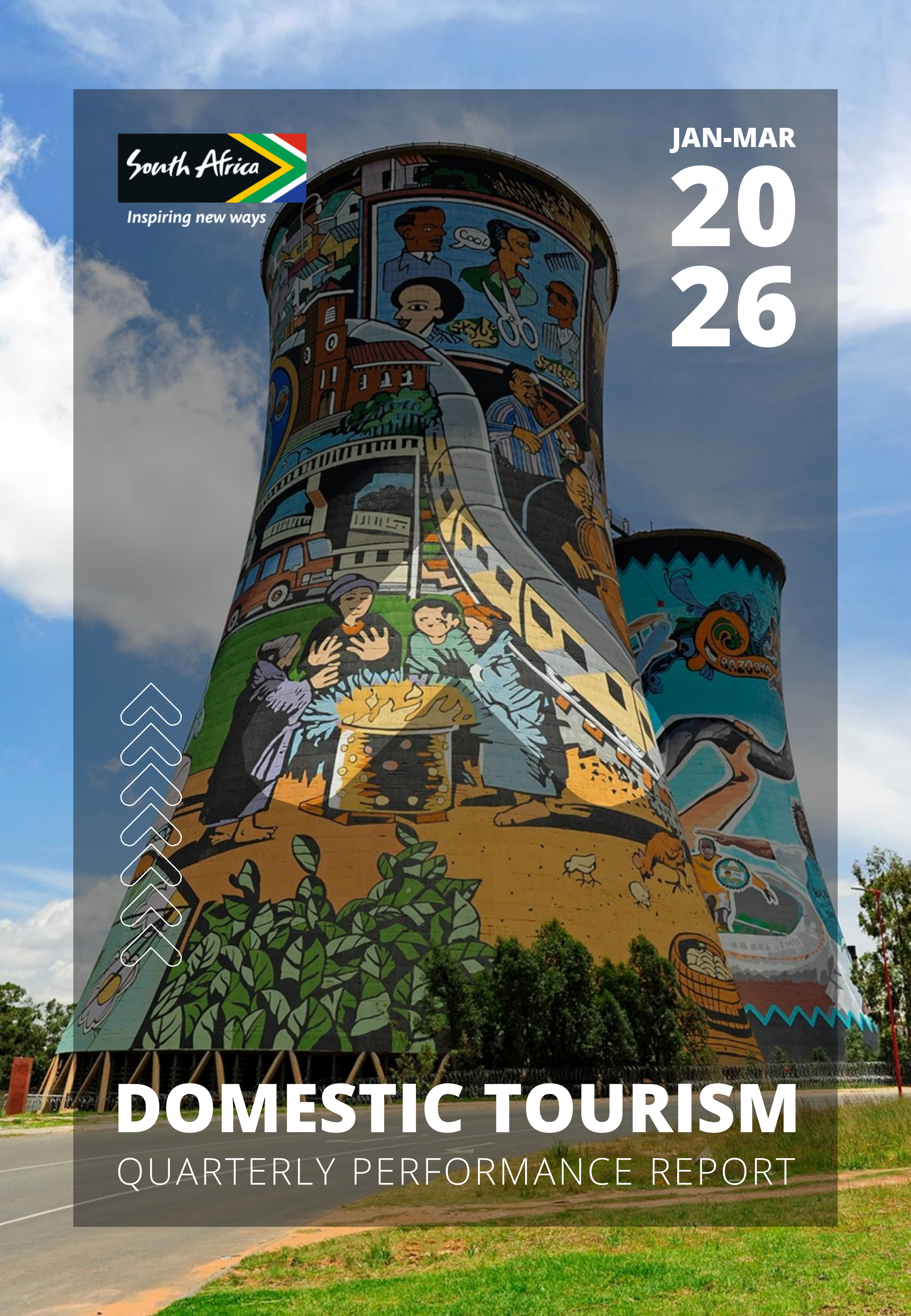


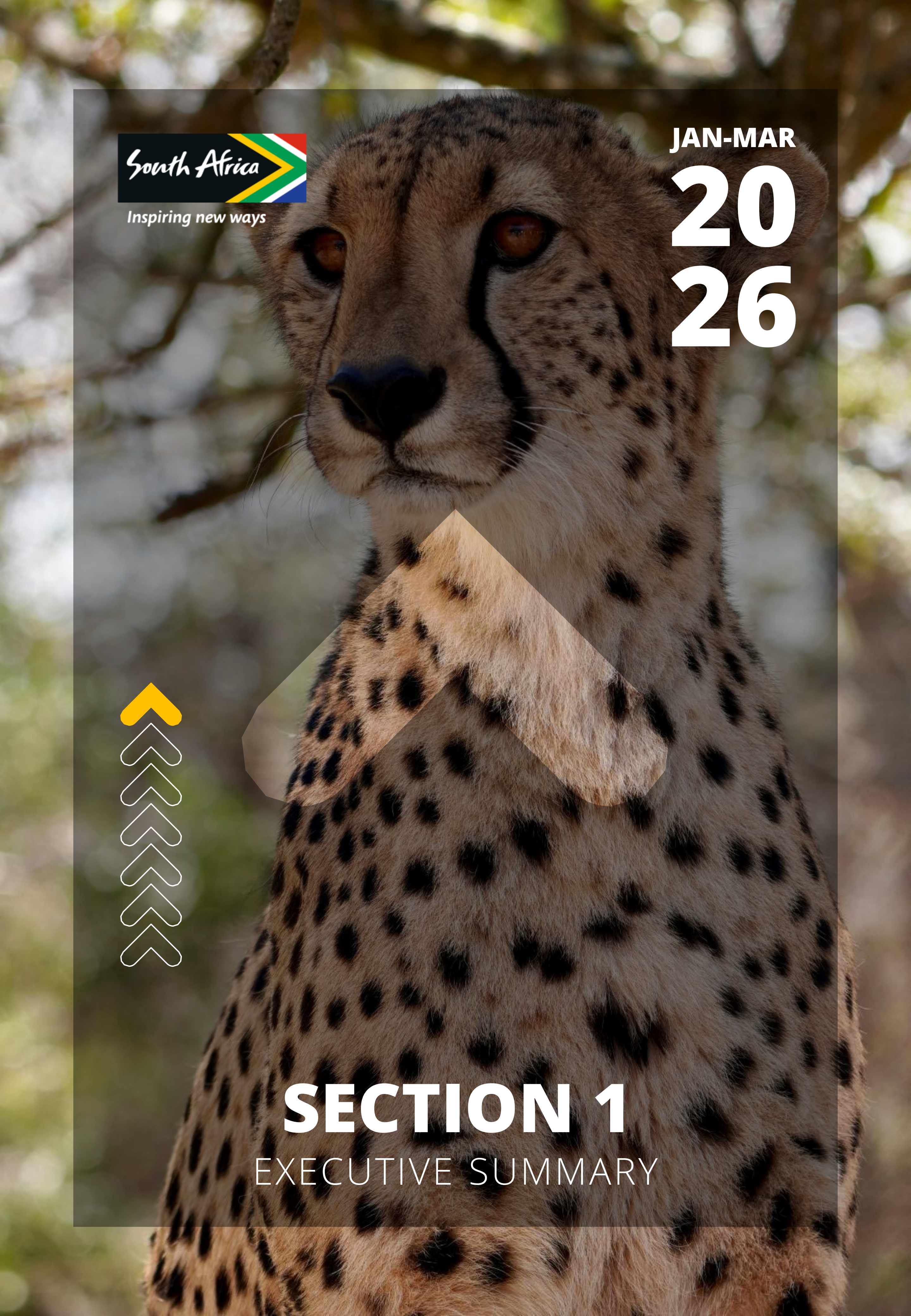
South Africa
Inspiring new ways

JAN-MAR
2026

DOMESTIC TOURISM

QUARTERLY PERFORMANCE REPORT

TABLE OF CONTENTS



JAN-MAR

2026

SECTION 1

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

MARKET OVERVIEW

The Q1 2026 domestic tourism market is characterised by a sharp divergence between volume expansion and value contraction, reflecting a strong recovery in participation alongside continued pressure on expenditure. While travel volumes have expanded significantly, economic yield per traveller continues to decline, reinforcing a structural shift toward volume-driven rather than value-driven growth. This was consistent with trends observed in late 2025.

Total domestic overnight travel reached the 10-million trip mark in Q1 2026. However, this was due to market expansion (a 23.8% increase in domestic tourists to 9.8-million), rather than an increase in trip frequency among existing travellers.

Despite strong growth, the value of domestic tourism continues to weaken, with total overnight spend declining to R20.8-billion, and average spend per trip falling to a new low of R2,076.

Domestic day trips remained largely stable in Q1 2026. While volumes have plateaued over the past three Q1 periods, day trip expenditure increased by 8.1%, indicating a modest improvement in spend per trip, rather than growth in day-travel activity.

This sustained downward pressure reflects the financial strain facing many households, as high unemployment, growing debt obligations, and rising living costs (particularly transport and fuel expenses) place pressure on household finances. Households continue to prioritise essential expenditure, with travel behaviour increasingly shaped by cost sensitivity and constrained discretionary spending, resulting in a shift toward more budget-conscious travel patterns.

METRIC	Q1 2026 PERFORMANCE		STRATEGIC IMPLICATION
Domestic Tourists	9.8-million	**+23.8%**	Growth relies on expanding the market base to new travellers or returning travellers
Overnight Trips	10.0-million	**+20.2%**	Strong recovery and market expansion, breaking historic Q1 records.
Overnight Spend	R 20.8-billion	**-5.9%**	Net value is contracting for a second consecutive year.
Average Overnight Spend	R 2,076	**-21.7%**	Wallet share per trip is severely constrained.
Day Trips	27.3-million	**+1.0%**	Market volume stabilised but remains stagnant.
Day Spend	R 33.3-billion	**+8.1%**	Value growth driven by higher spend per trip.

EXECUTIVE SUMMARY

KEY INSIGHTS

SHIFTS IN BEHAVIOUR

- **The Dominance of Visiting Friends and Relatives (VFR):** VFR remains the structural backbone of domestic travel, accounting for 57.2% of overnight trips, although its share declined slightly. VFR trips grew to 5.7-million (+16%), while spend rose modestly by 6% to R8.8-billion. However, average spend per trip declined for the second consecutive year.
- **Holiday travel rebounded in volume terms:** Holiday trips increased +49.4% to 2.3-million (expanding its market share to 22.6%). However, total holiday spend fell by -27.5% to R6.3-billion, while average spend per trip declined by more than half (-51.4%).
- **MICE (Meetings, Incentives, Conferences, and Exhibitions):** travel showed a strong recovery in participation: Trips increased by +44.2% and spend by +18.5%. However, average spend per MICE trip declined by 17.8%.
- **Stagnant Day-Trip Market:** Day trips remain structurally stagnant at around 27-million trips, well below pre-2023 levels. Coastal and traditional tourism-heavy provinces (KwaZulu-Natal, Western Cape, and Mpumalanga) experienced day-trip declines, while inland hubs like Gauteng gained share. Day trip spend increased by +8.1% and average spend per trip increased +7.1%.

EXPENDITURE PATTERNS

Expenditure patterns show a reprioritisation of travel budgets, with expenditure increasingly concentrated in essential categories. This indicates that while travel continues, non-essential tourism consumption is increasingly constrained, and spending is being redirected toward transport, food, and core travel necessities.

- **Transport and Vehicle Costs Heavily Squeeze Wallets:** Transport (fares) and Vehicle (fuel and servicing) remain the largest cost drivers, together accounting for an R8.0-billion footprint (R4.0-billion each), confirming that getting to a destination consumes a significant share of the total trip budget.
- **Accommodation**: Accommodation expenditure rebounded to R3.9-billion, broadly aligned with the +33% increase in total bednights (36.2-million).
- **The Leisure Squeeze:** As travel-essential costs increased, discretionary categories came under pressure. Personal shopping declined by -23.6%, while Leisure & Entertainment fell sharply by -55.5%.

EXECUTIVE SUMMARY

KEY INSIGHTS: PROVINCIAL RESULTS

Domestic tourism growth was broadly positive across provinces, with KwaZulu-Natal, Limpopo, the Eastern Cape, Gauteng, and the Western Cape emerging as core markets. Mpumalanga was the only province to record across-the-board declines in destination trips, spend, bednights, and average length of stay.

- **Volume vs. Value Performance Split:** The domestic tourism landscape highlights a clear divide between high-volume, lower-spend destinations and lower-volume, higher-spend markets.
- **Volume Leaders:** KwaZulu-Natal remained the largest volume destination, recording 2.0-million overnight trips and 8.8-million bednights (+80.2%). However, total spend declined by -50.7% to R3.0-billion.
- **Value Leaders:** The Western Cape delivered strong value growth (+65.4% in spend) alongside rising volumes, surpassing the one-million-trip mark and generating the country's highest overnight spend at R4.4-billion.
- **Volume and Value:** The Eastern Cape performed strongly across both dimensions, increasing to 1.4-million overnight trips (+40.1%) while recording exceptional spend growth to reach R4.1-billion.
- **Source Markets:** Gauteng reinforced its dual role as South Africa's primary source market and a key destination hub, remaining the key driver of interprovincial travel. It generated 2.6-million overnight trips and 7.2-million day trips.

RECOMMENDATIONS

MAXIMISE VALUE IN VFR

As has been identified over the course of 2025, VFR remains the largest and most consistent segment of domestic tourism and continues to expand in absolute volume. VFR travel is also characterised by growing bednights and moderate increases in average length of stay, reflecting its role as a primary enabler of longer-stay domestic travel.

- Capitalising on VFR travel requires meeting financially constrained consumers where they are. Tourism operators need to create budget-friendly packages that encourage family visitors to use tourism facilities during quieter times and spend money in the widely distributed local communities they visit.
- Opportunities remain strong to package seamless, budget-friendly deals, such as discounted regional activities, tailored dining partnerships, and 'Friends & Family' attraction passes, built specifically to fit the spontaneous and informal nature of VFR travel.
- The objective is to increase daily spend among incoming VFR travellers by offering low-cost leisure and attraction options, with a focus on high-volume source markets driving these trips.

EXECUTIVE SUMMARY

REPOSITION HOLIDAY TRAVEL TOWARD AFFORDABLE PACKAGING

The significant decline in average holiday trip spend highlights a market highly sensitive to financial unpredictability. While demand for holidays persists, consumers are actively constraining budgets to avoid overspending. To address this financial concern and restore holidaymaker confidence, there is a need to reduce spending uncertainty through targeted packaging:

- **Fixed-Price Packages:** Develop all-inclusive regional bundles by pairing mid-range accommodation with transport providers, shielding budget-conscious travellers from unexpected expenses.
- **Short-Break Bundles:** Focus marketing on easily accessible, nearby destinations through localised, lower-cost itineraries.
- **Low-Risk Pricing:** Introduce predictable pricing tiers and flexible booking options to lower barriers to entry.

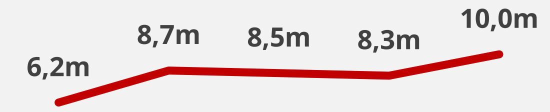
REVITALISE AND REPOSITION THE DAY-TRIP ECONOMY

Day-trip volumes remain stable at around 27-million, but demand is increasingly concentrated in accessible inland destinations. This reflects a structural shift away from long-distance excursions toward more convenient, cost-efficient regional travel, driven by affordability and ease of access.

- **Target Urban Demand Nodes:** Focus marketing efforts on short-distance travel around major metropolitan and regional hubs where day-trip volumes are concentrated.
- **Urban Experience Clusters:** Combine shopping, local dining, and recreational spaces into integrated, single-day itineraries that target dense, urban and city-dwelling populations.
- **Accessible Leisure Infrastructure:** Promote affordable, low-friction regional options such as family park bundles, day-pass products, and community attractions across urban and peri-urban environments to capture the "convenient and close" trend.
- **Transport-Linked Offerings:** Develop integrated packages aligned with local transit networks or fuel-efficient routes to help offset transport cost pressures limiting longer-distance travel.

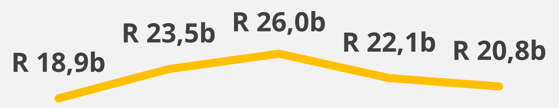
HEADLINE INDICATORS

OVERNIGHT TRIPS



10.0m
+20.2%

OVERNIGHT SPEND

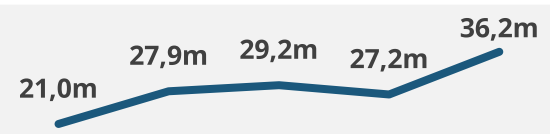


R 20.8b
-5.9%

AVERAGE OVERNIGHT SPEND

R 2,076
-21.7%

BEDNIGHTS

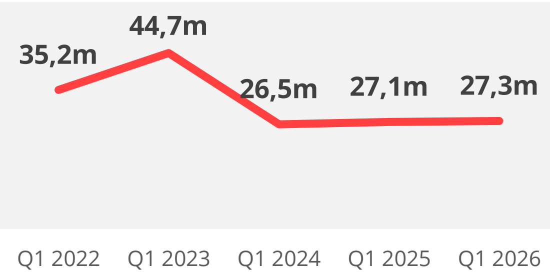


36.2m
+33.0%

LENGTH OF STAY

3.6
+10.7%

DAY TRIPS



27.3m
+1.0%

Key growth and change rates shown in this report are in comparison to 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. Statistics South Africa. (2026). *Gross Domestic Product, Fourth Quarter 2025*. https://www.statssa.gov.za/publications/P0441/P04414thQuarter2025.pdf
2. Statistical Release P0441: Consumer Price Index March 2026. Statistics South Africa https://www.statssa.gov.za/publications/P0141/P0141March2026.pdf
3. Statistical Release P0211: Quarterly Labour Force Survey Quarter 1: 2026. 12 May 2026. Statistics South Africa. https://www.statssa.gov.za/publications/P0211/P02111stQuarter2026.pdf
4. https://www.resbank.co.za/en/home/publications/publication-detail-pages/statements/monetary-policy-statements/2026/march
5. Media Statements: Minister Gwede Mantashe announces adjustment of fuel prices effective from 4 March 2026. https://www.gov.za/news/media-statements/minister-gwede-mantashe-announces-adjustment-fuel-prices-effective-4-march
6. South African Reserve Bank. (2026). *Quarterly Bulletin — March 2026*. https://www.resbank.co.za/en/home/publications/publication-detail-pages/quarterly-bulletins/quarterly-bulletin-publications/2026/march

DISCLAIMER

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

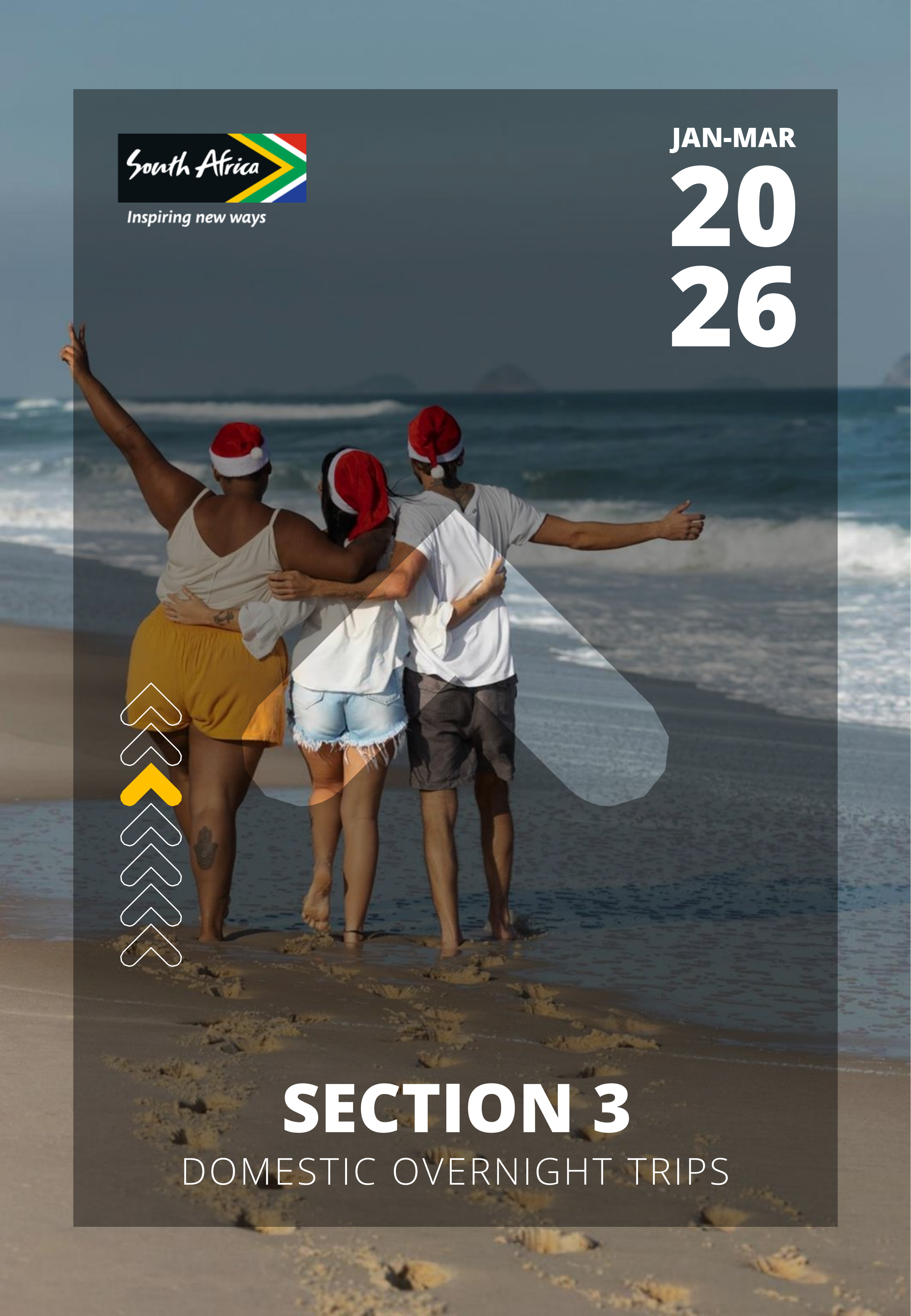
Any detected errors are immediately corrected, and the latest version of the report is always made available on www.southafrica.net/research.

To access this report online please visit the research section on the South Africa Tourism website at www.southafrica.net/research or for more information e-mail: research@southafrica.net.

Inspiring new ways

JAN-MAR

2026



SECTION 3

DOMESTIC OVERNIGHT TRIPS

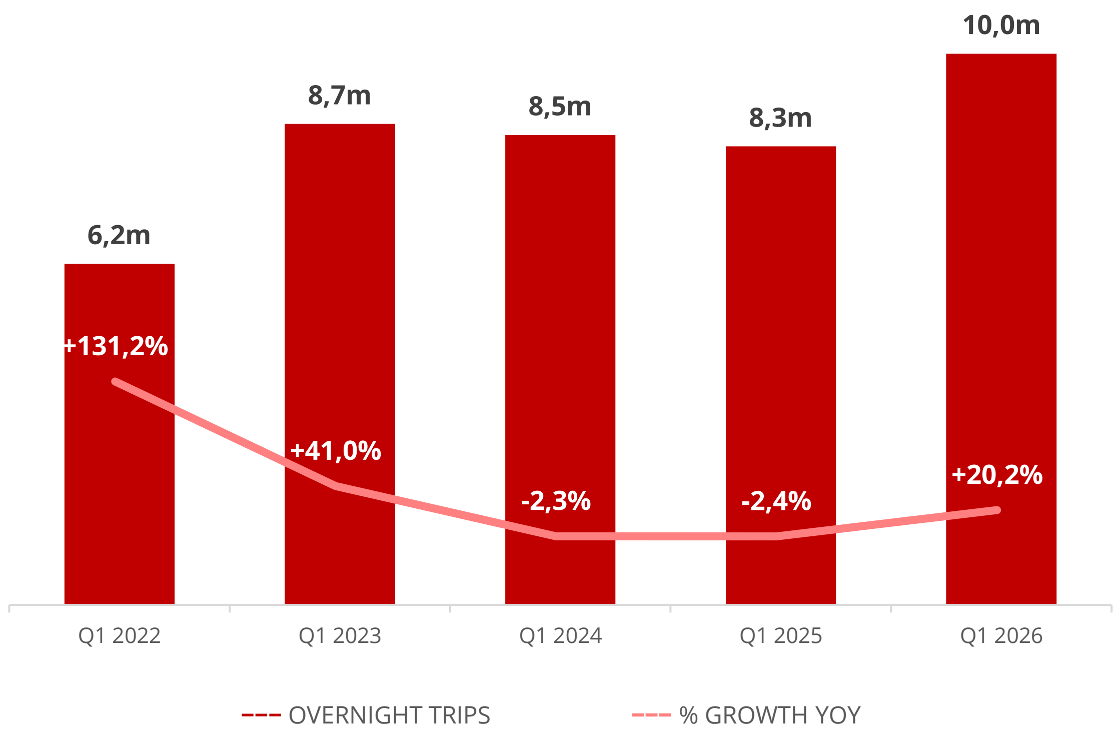
OVERNIGHT TRIPS

10.0m +20.2%

Overnight trips averaged about 8.5-million from Q1 2023 to Q1 2025. However, overnight trips rose sharply by +20.2% to 10-million in Q1 2026, recovering from declines recorded in Q1 2024 and Q1 2025.

This is the first time overnight trips have reached 10-million, continuing the growth trend observed in Q4 2025.

OVERNIGHT TRIPS: Q1 2022 – Q1 2026



OVERNIGHT TRIPS

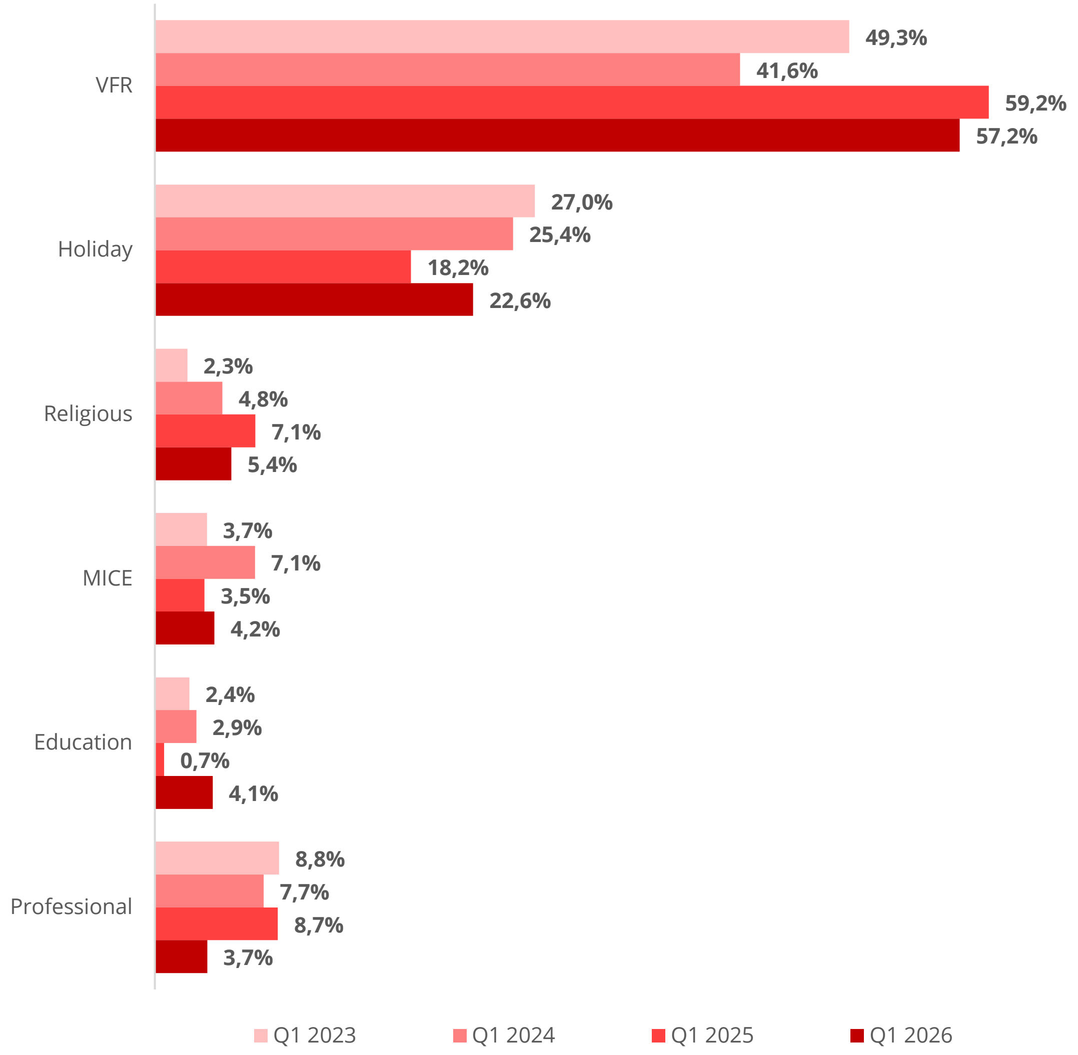
10.0m +20.2%

VFR travel experienced a slight decline in Q1 2026, with its share of overnight trips decreasing from 59.2% to 57.2%. Despite this decline, it remained the dominant purpose of travel. The share of holiday trips increased notably from 18.2% to 22.6%.

MICE travel also recorded a slight increase from 3.5% to 4.2%. In contrast, the share of trips for business or professional purposes declined from 8.7% to 3.7%.

Trips undertaken for religious purposes also declined, reaching 5.4%. Meanwhile, the share of trips undertaken for education purposes increased to 4.1% in Q1 2026.

SHARE OF OVERNIGHT TRIPS BY PURPOSE: Q1 2023 – Q1 2026



OVERNIGHT TRIPS 10.0m +20.2%

	VFR	HOLIDAY	MICE
Trips	5.7m +16.0%	2.3m +49.4%	425k +44.2%
Spend	R 8.8b +6.0%	R 6.3b -27.5%	R 1.3b +18.5%
Spend per trip	R 1,543 -8.6%	R 2,763 -51.4%	R 3,101 -17.8%
Bednights	18.6m +23.0%	7.5m +26.1%	1.9m +56.7%
Length of stay	3.2 +6.0%	3.3 -15.6%	4.6 +8.6%
Share	57.2% -3.5%	22.6% +24.3%	4.2% +20.0%

The VFR category of domestic travel recorded growth in Q1 2026 across total trips, total spend, bed nights and length of stay.

Although the share of travel declined marginally to 57.2%, the number of VFR trips reached 5.7-million trips (up +16%) compared to Q1 2025.

Total spend rose by 6% to R 8.8-billion, but the average spend per trip decreased from R1,688 in Q1 2025 to R1,543 in Q1 2026. This was the second consecutive year-on-year decline in average spend for VFR travel.

The number of bednights increased substantially by 23%, from 15.1-million in Q1 2025 to 18.6-million in Q1 2026. The average length of stay also increased slightly to 3.2 nights.

The holiday category's share of total trips increased by +24.3%, rising from 18.2% in Q1 2025 to 22.6% in Q1 2026.

More people took holiday trips in Q1 2026, with total holiday trips increasing by 49.4% to reach 2.3-million, compared to 1.5-million trips in Q1 2025. Bednights increased from 5.9-million to 7.5-million, but the average length of stay decreased by -15.6%.

Total spend on holiday trips declined by -27.5%, from R 8.6-billion in Q1 2025 to R 6.3-billion in Q1 2026. Average spend per trip declined even more sharply (by -51.4%) from R5,691 to R2,763.

Economic pressures may have led travellers to become more budget-conscious, opting for shorter and lower-cost trips.

After a substantial decline in Q1 2025, the MICE category rebounded in Q1 2026, growing by +44.2% to reach 425,000 trips. The category's share of total trips increased to 4.2%.

Bednights recorded even stronger growth, increasing by +56.7% to 1.9-million nights. The average length of stay also continued its upward trend, rising moderately from 4.2 nights to 4.6 nights.

Total spending increased to R1.3-billion (+18.5%). However, average spend per trip declined by -17.8% in Q1 2026, falling from R3,775 to R3,101, highlighting that spending per trip remained under pressure.

In 2025, the MICE category experienced declines in share of total travel across three quarters (Q1 2025, Q2 2025, and Q4 2025).

OVERNIGHT TRIPS **10.0m** +20.2%

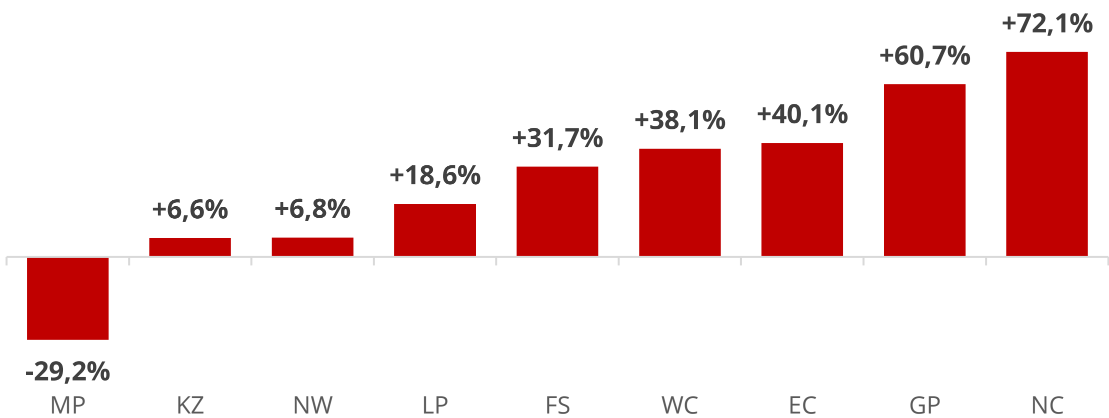
The provincial growth rates in Q1 2026 indicate a strong rebound in domestic travel. With the exception of Mpumalanga, all provinces recorded growth as main destination provinces. This contrasts with Q1 2025, when five provinces experienced a decline in growth.

Aside from the strong growth recorded in the Northern Cape (from a relatively small base), Gauteng (+60.7%) recorded the next highest growth rate, followed by the Eastern Cape (+40.1%), the Western Cape (+38.1%) and the Free State (+31.7%). Limpopo, North West and KwaZulu-Natal recorded more moderate growth rates.

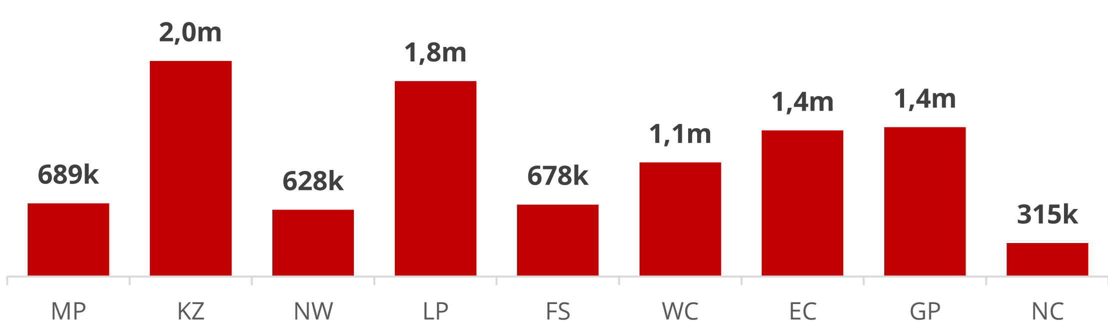
KwaZulu-Natal remained the leading main destination province since Q4 2023. KwaZulu-Natal (2.0-million), Limpopo (1.8-million), the Eastern Cape (1.4-million) and Gauteng (1.4-million) were the top four main destination provinces in Q1 2026. The Western Cape surpassed the one-million mark, reaching 1.1-million trips. The Northern Cape rebounded from 183k trips in Q1 2025 to 315k trips in Q1 2026. Mpumalanga (-29.2%) was the only province to record a decline.

Although trip volumes increased strongly, results showed lower average spend per trip. These results indicate that domestic tourism growth remains volume-driven rather than spend-driven.

DESTINATION PROVINCE GROWTH RATE: Q1 2025 v Q1 2026



TRIPS TO DESTINATION PROVINCE: Q1 2026



TRIPS TO DESTINATION PROVINCE: Q1 2024 – Q1 2026

	MP	KZ	NW	LP	FS	WC	EC	GP	NC
Q1 2024	749k	1.2m	839k	1.5m	812k	595k	1.2m	1.4m	240k
Q1 2025	972k	1.9m	588k	1.5m	515k	777k	980k	873k	183k
Q1 2026	689k	2.0m	628k	1.8m	678k	1.1m	1.4m	1.4m	315k

OVERNIGHT TRIPS 10.0m +20.2%

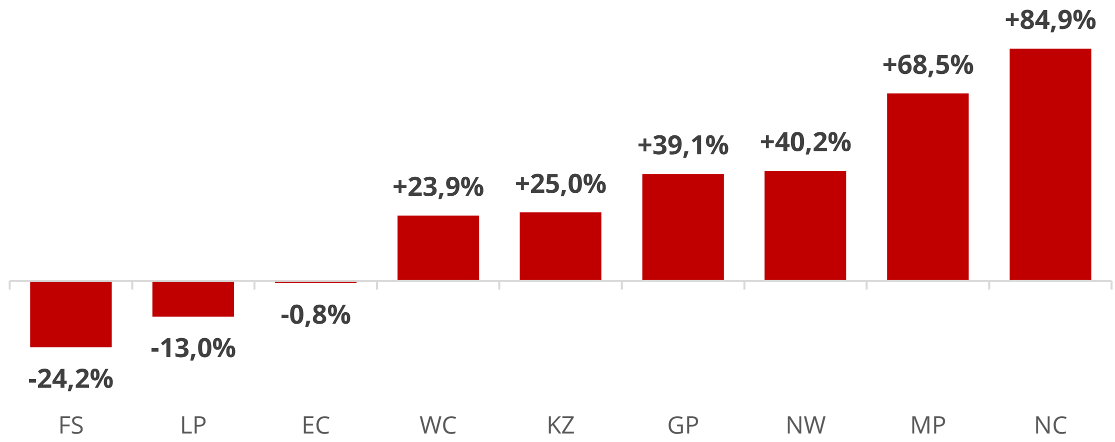
With the exception of the Eastern Cape, Limpopo, and the Free State, all provinces recorded growth as source provinces in Q1 2026.

The Northern Cape recorded the highest growth rate among source provinces (+84.9%). Mpumalanga (+68.5%) also posted strong growth in Q1 2026, continuing its upward trend from Q1 2025. The North West, which experienced a substantial decline in Q1 2025, rebounded with growth of +40.2% in Q1 2026. Gauteng grew further by +39.1% in Q1 2026.

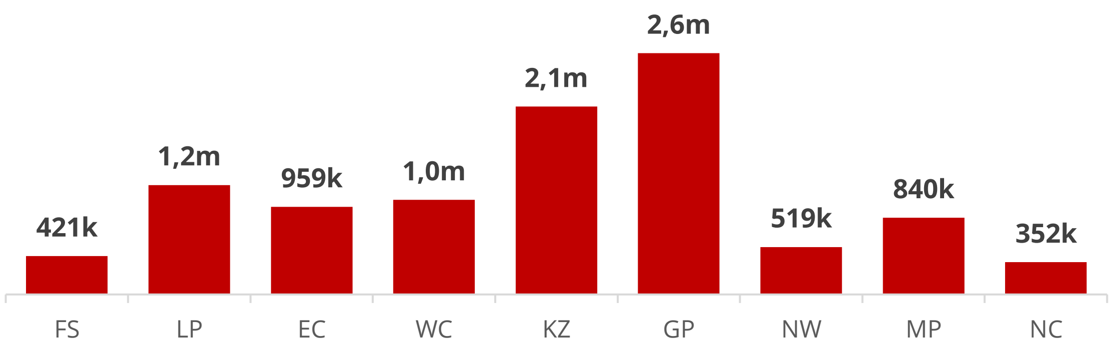
The Free State recorded the largest decline, falling by 24.2% to 421k trips. Limpopo also declined in Q1 2026, continuing its broader downward trend from 2.2-million trips in Q1 2023 to 1.2-million trips in Q1 2026. Although Limpopo recorded growth in Q4 2025, the return to negative growth in Q1 2026 suggests that its recovery remains fragile.

Gauteng remained the leading source province in Q1 2026, reaching 2.6-million trips, followed by KwaZulu-Natal with 2.1-million trips. Despite negative growth, Limpopo still recorded 1.2-million trips, while the Western Cape reached the one-million trip mark.

SOURCE PROVINCE GROWTH RATE: Q1 2025 v Q1 2026



TRIPS FROM SOURCE PROVINCE: Q1 2026



TRIPS FROM SOURCE PROVINCE: Q1 2023 – Q1 2026

	FS	LP	EC	WC	KZ	GP	NW	MP	NC
Q1 2024	724k	1.5m	1.3m	484k	1.1m	1.8m	937k	458k	242k
Q1 2025	555k	1.4m	966k	836k	1.6m	1.9m	370k	498k	191k
Q1 2026	421k	1.2m	959k	1.0m	2.1m	2.6m	519k	840k	352k

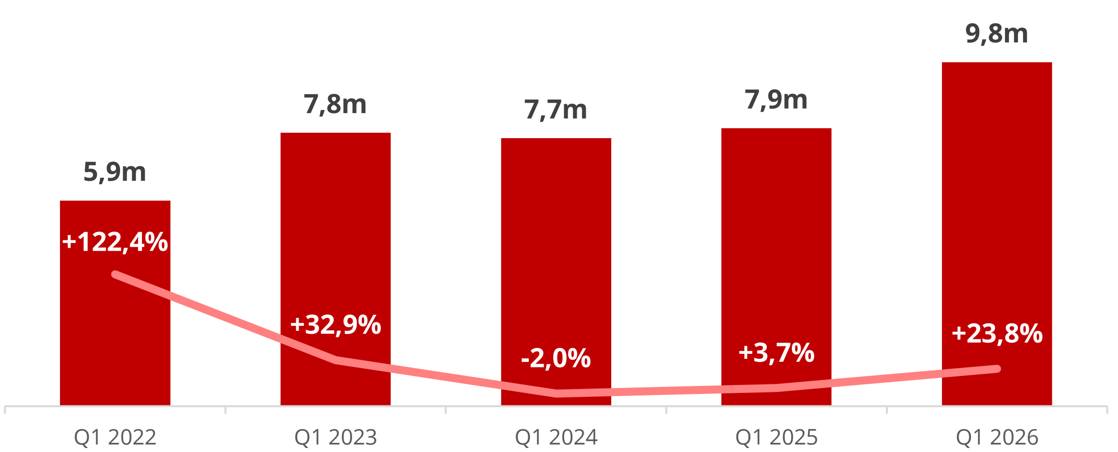
OVERNIGHT TRIPS **10.0m** +20.2%

In Q1 2026, the number of domestic tourists increased by 23.8% to 9.8-million, up from 7.9-million in Q1 2025.

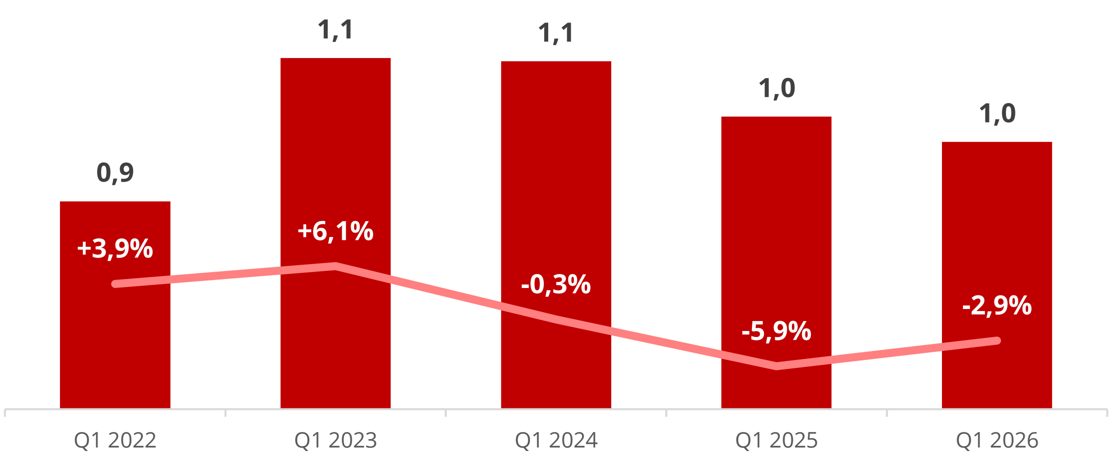
Following declines in Q1 2024 and Q1 2025, the average number of trips per domestic tourist declined again by -2.9%, remaining at approximately one trip per person. This suggests that travellers are still limiting how often they travel, and the stagnant trips-per-person ratio could constrain future growth momentum.

As was the case in Q4 2025, domestic travel growth in Q1 2026 was driven more by market expansion than by increased travel frequency among existing travellers. This is reflected in the close relationship between total trips (10-million) and domestic tourists (9.8-million), indicating that growth was primarily driven by more people travelling rather than existing travellers taking additional trips.

DOMESTIC TOURISTS: Q1 2022 – Q1 2026



AVG. OVERNIGHT TRIPS PER TOURIST: Q1 2022 – Q1 2026



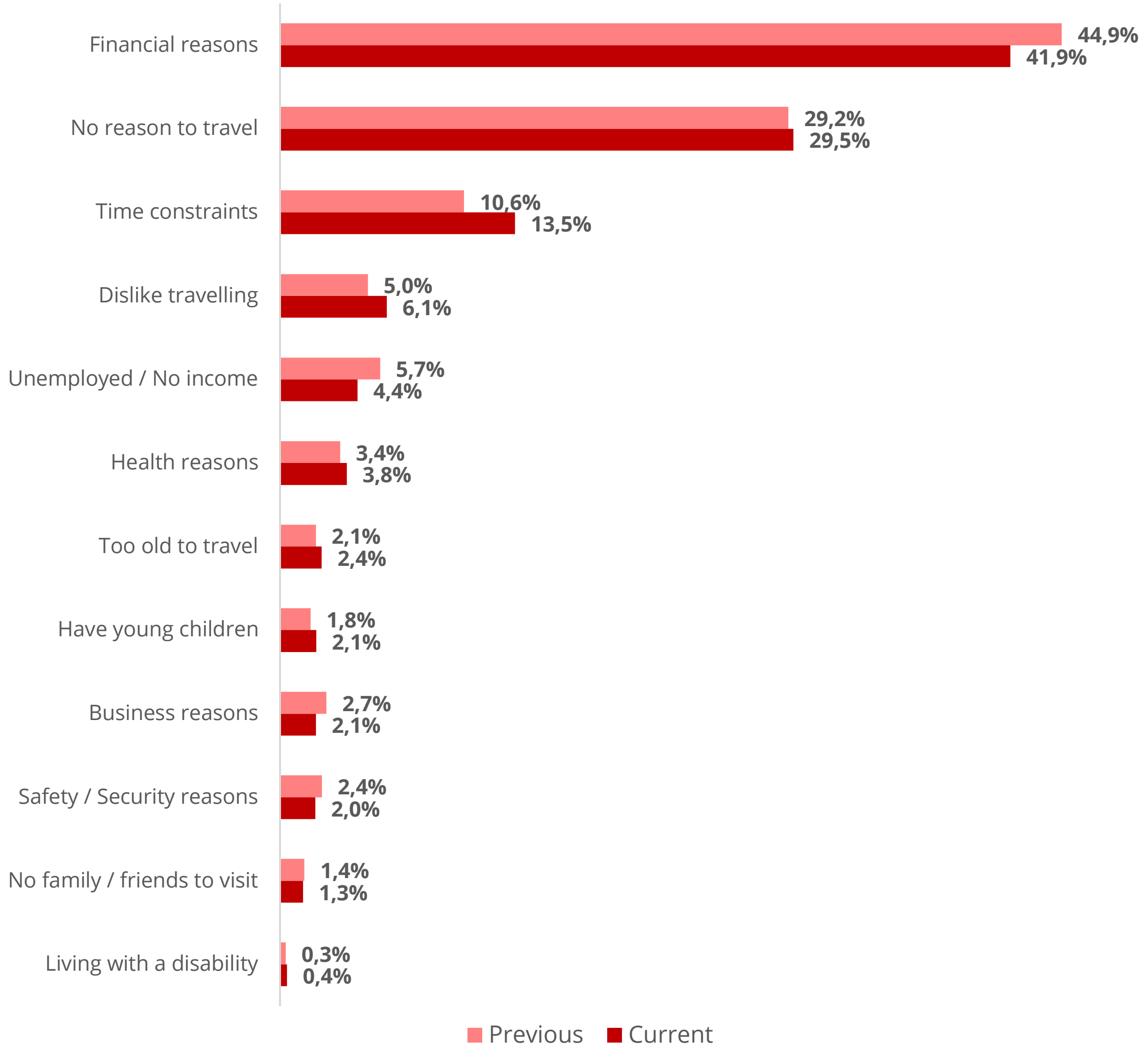
OVERNIGHT TRIPS **10.0m** +20.2%

In Q1 2026, the three primary reasons for not travelling were financial constraints, having no reason to travel, and time limitations.

These reasons remained broadly consistent with year-on-year trends, with only slight changes observed: "financial reasons" declined marginally to 41.9%, "no reason to travel" remained relatively stable at 29.5%, and "time constraints" increased to 13.5%.

Together, these top three reasons accounted for approximately 85% of all responses, with financial reasons alone representing more than two-fifths of the total.

REASONS FOR NOT TRAVELLING: Q1 2025 v Q1 2026



DOMESTIC SPEND R 20.8b -5.9%

Overnight spend declined for a second consecutive year-on-year period, although at a slower rate of -5.9% in Q1 2026. Spend decreased from R26.0-billion in Q1 2024 to R22.1-billion in Q1 2025, before declining further to R20.8-billion in Q1 2026.

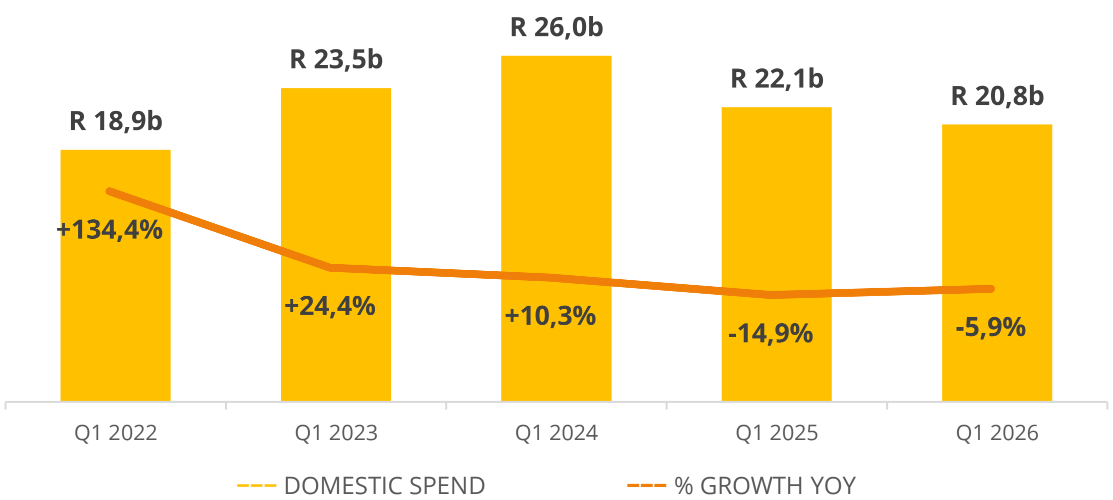
Spend by VFR and holiday travellers accounted for 72.6% of total domestic spend in Q1 2026. The share of VFR spend increased from 37.7% to 42.5%, while the share attributed to holiday travel declined from 39.1% to 30.1%.

VFR spend increased by 6%, from R8.3-billion to R8.8-billion, whereas holiday spend declined by 27.5%, from R8.6-billion to R6.3-billion.

The sharp decline in holiday spend, both in value and share, reflects continued financial pressure and reduced disposable income for leisure activities.

Both professional (+7.9%) and MICE (+18.5%) travel recorded increases in spend, accompanied by growth in their respective shares of overnight spend. Purchasing (i.e. "business shopping") recorded a substantial increase in spend, rising from R64.2-million in Q1 2025 to R516.8-million in Q1 2026.

DOMESTIC SPEND: Q1 2022 – Q1 2026



DOMESTIC SPEND BY PURPOSE: Q1 2025 v Q1 2026

	Q1 2025	Q1 2026	% Q1 2025	% Q1 2026
VFR	R 8.3b	R 8.8b	37.7%	42.5%
Holiday	R 8.6b	R 6.3b	39.1%	30.1%
Professional	R 2.5b	R 2.7b	11.2%	12.8%
MICE	R 1.1b	R 1.3b	5.0%	6.3%
Purchasing	R 64.2m	R 516.8m	0.3%	2.5%

DOMESTIC SPEND R 20.8b -5.9%

Average overnight spend declined for a second consecutive year-on-year period. Average spend decreased by -21.7%, from R2,651 in Q1 2025 to a new low of R2,076 in Q1 2026.

Average spend on holiday trips recorded the largest decline, falling by -51.4%, from R5,691 in Q1 2025 to R2,763 in Q1 2026.

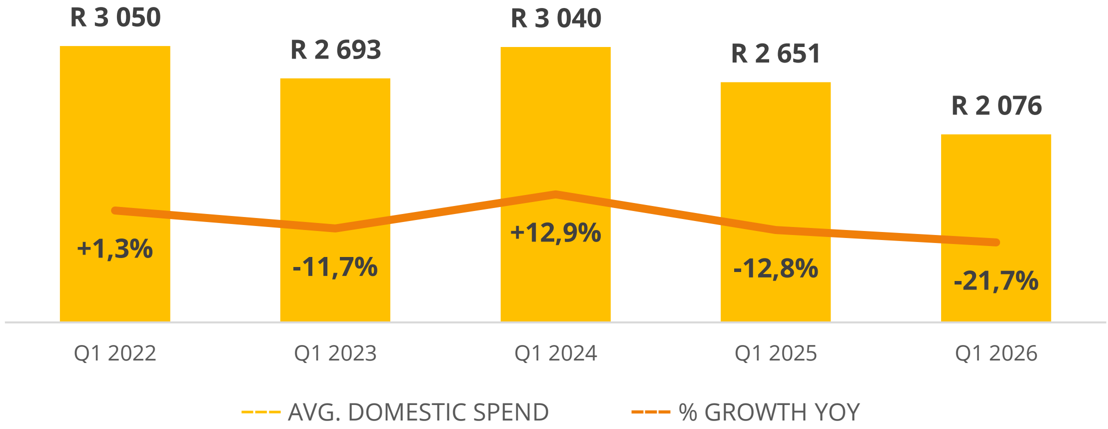
While VFR spend grew marginally by +6% in Q1 2026, average spend per trip continued its downward trend, declining by -8.6% to R1,543, following an earlier decline recorded in Q1 2025.

MICE spend grew by +18.5% in Q1 2026; however, the average spend per trip declined by -17.8%, from R3,775 to R3,101.

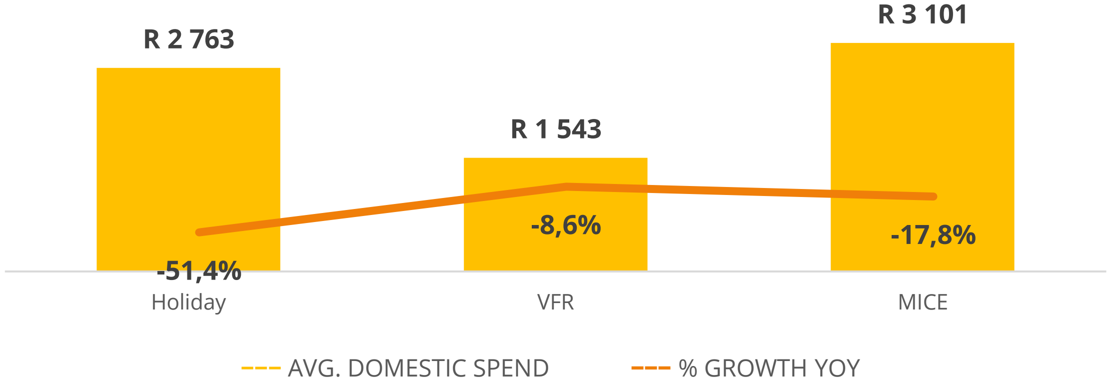
The declines in average spend across both holiday and VFR travel place pressure on sectors reliant on higher-value visitor spending and may result in weaker revenue growth.

For MICE specifically, the decline in spend per trip could also indicate shorter business events, tighter travel budgets, or a shift toward more cost-efficient meeting formats.

AVERAGE DOMESTIC SPEND: Q1 2022 – Q1 2026



AVERAGE DOMESTIC SPEND BY PURPOSE: Q1 2026



DOMESTIC SPEND R 20.8b -5.9%

Transport and Vehicle expenditure constituted the largest spending category in Q1 2026, followed by Accommodation and Food & Beverages.

Since Q2 2025, Transport expenditure is now reported under two categories: *Transport* (plane, bus, and long-distance taxi fares) and *Vehicle* (fuel and servicing costs). In Q1 2026, under this classification, Transport spend was R4.0-billion and Vehicle spend was also R4.0-billion, totalling approximately R8.0-billion. This compares with R6.3-billion recorded under the previous single Transport category in Q1 2025, representing an overall increase of approximately R1.7-billion in transport-related spending (up by +27.6%).

Following its substantial decline in Q1 2025, Accommodation expenditure increased from R1.7-billion to R3.9-billion in Q1 2026. Food & Beverages declined moderately by -7.7% to R3.9-billion. Personal Shopping declined by -23.6%, falling to R3.4-billion. After its strong growth in Q1 2025, Leisure & Entertainment fell sharply by -55.5% to R602.6-million.

There are several factors to consider here: if travel is up, non-essential leisure is being heavily squeezed. There also appears to be substitution toward travel-related expenses rather than goods. Meanwhile, food and beverages remain a necessity category, although consumers may be trading down within it.

DOMESTIC SPEND BY CATEGORY: Q1 2022 v Q1 2026

	Q1 2025	Q1 2026	
VEHICLE		R 4.0b	- %
TRANSPORT		R 4.0b	-%
FOOD & BEVERAGES	R 4.3b	R 3.9b	-7.7%
ACCOMMODATION	R 1.7b	R 3.9b	+134.4%
PERSONAL SHOPPING	R 4.4b	R 3.4b	-23.6%
LEISURE & ENTERTAINMENT	R 1.4b	R 602.6m	-55.5%

*Year-on-year comparison not applicable — Transport expenditure is now reported under two separate categories: Transport (plane, bus, and long-distance taxi fares) and Vehicle (fuel and servicing costs)

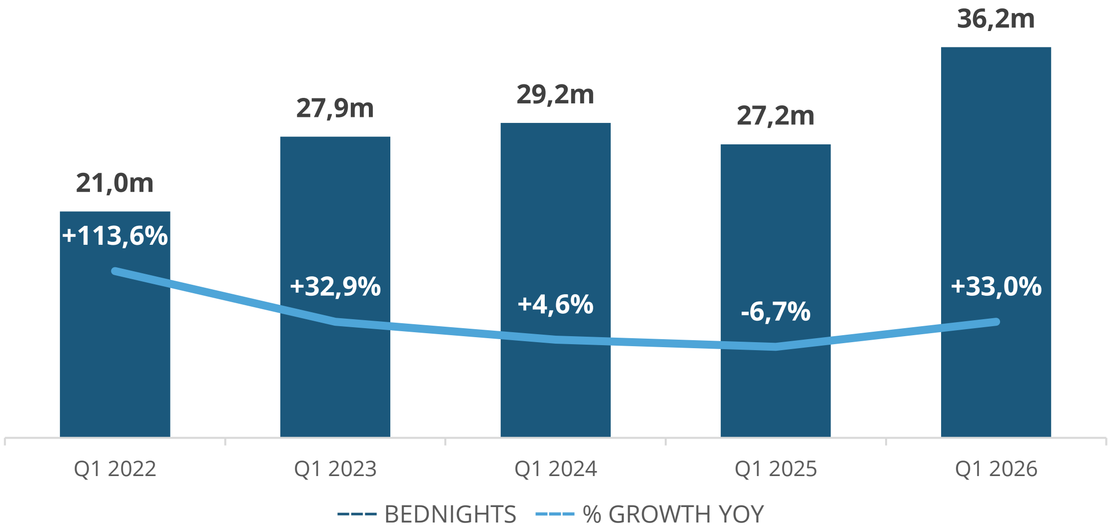
BEDNIGHTS 36.2m +33.0%

After a moderate decline in Q1 2025, bednights increased strongly by +33% in Q1 2026, rising from 27.2-million to 36.2-million. The average length of stay also increased by +10.7%, from 3.3 nights in Q1 2025 to 3.6 nights in Q1 2026.

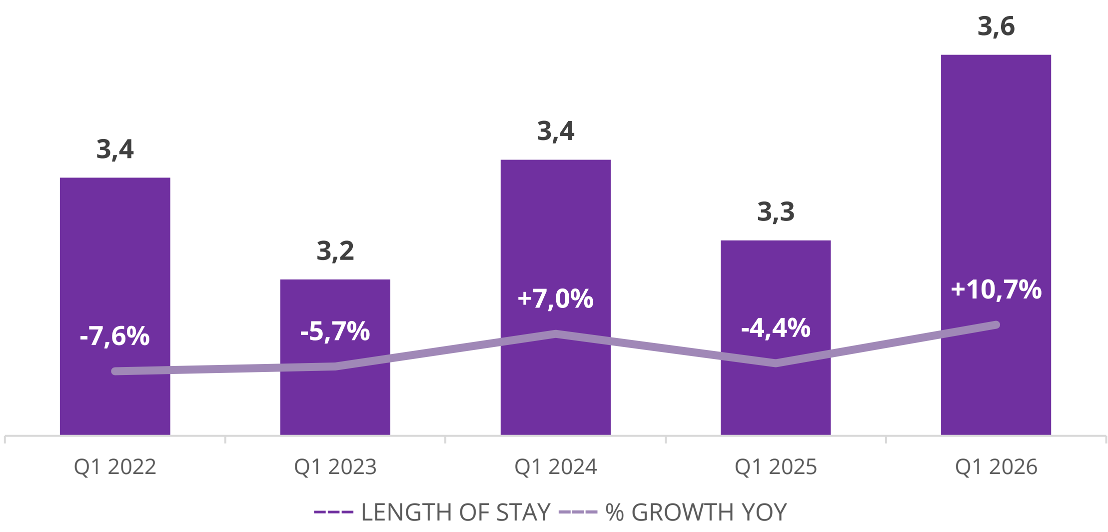
The trend in Q1 2026 mirrors that of Q4 2025, with increases in overnight trips, bednights, and average length of stay, despite declines in total spend and average spend per trip.

These results suggest that tourism activity strengthened in Q1 2026, even though visitor spending weakened. The weaker spending patterns indicate that economic gains from tourism may not yet be fully translating into stronger financial performance. The domestic tourism sector in Q1 2026 showed stronger participation and longer stays, but visitors spent less per trip, indicating growth in volume-driven rather than value-driven tourism.

DOMESTIC BEDNIGHTS: Q1 2022 – Q1 2026



DOMESTIC LENGTH OF STAY: Q1 2022 – Q1 2026



JAN-MAR

2026

SECTION 4

PROVINCIAL PERFORMANCE

PROVINCIAL PERFORMANCE

In Q1 2026, KwaZulu-Natal, Limpopo, the Eastern Cape, Gauteng, and the Western Cape dominated the tourism landscape, driven by strong trip volumes and high-value tourism activity.

KwaZulu-Natal (2.0-million) and Limpopo (1.8-million) recorded the highest trip volumes. The Western Cape (R4.4-billion) and the Eastern Cape (R4.1-billion) recorded the highest tourism spend. KwaZulu-Natal (8.8-million), Limpopo (6.1-million), the Eastern Cape (5.4-million), and Gauteng (5.2-million) recorded the highest number of bednights.

KwaZulu-Natal was the volume leader, recording the highest number of overnight trips at 2.0-million (+6.6%), the fourth-highest total overnight spend at R3.0-billion (-50.7%), and the highest number of bednights at 8.8-million (+80.2%).

The **Western Cape** grew to 1.1-million trips (+38.1%), recorded the highest overnight spend at R4.4-billion (+65.4%), and saw bednights increase from 2.7-million to 3.8-million.

The **Eastern Cape** saw substantial growth as a main destination province, recording 1.4-million trips (+40.1%), the second-highest total spend at R4.1-billion (+144.9%), growth in bednights to 5.4-million (+121.0%), and the second-longest average stay at 3.9 nights (+57.7%).

KwaZulu-Natal and Limpopo can be described as high-volume, lower-spend destinations, while the Western Cape and Eastern Cape are lower-volume, higher-spend destinations. Only the Eastern Cape, the North West, and the Western Cape recorded growth in spend; in the remaining provinces, spend declined.

OVERNIGHT TRIP PERFORMANCE INDICATORS BY MAIN DESTINATION PROVINCE: Q1 2026

	TRIPS	SPEND	AVG SPEND	BEDNIGHTS	LOS
EC	1.4m	R 4.1b	R 2,958	5.4m	3.9
FS	678k	R 892.7m	R 1,317	1.2m	1.8
GP	1.4m	R 3.3b	R 2,335	5.2m	3.7
KZ	2.0m	R 3.0b	R 1,487	8.8m	4.3
LP	1.8m	R 2.2b	R 1,172	6.1m	3.3
MP	689k	R 1.4b	R 2,094	1.6m	2.3
NC	315k	R 378.7m	R 1,203	2.2m	7.0
NW	628k	R 1.2b	R 1,890	2.0m	3.2
WC	1.1m	R 4.4b	R 4,100	3.8m	3.5

PROVINCIAL PERFORMANCE

Gauteng and Limpopo were the next best-performing provinces in Q1 2026. **Gauteng** saw substantial growth, with trips increasing to 1.4-million (+60.7%), spend reaching R3.3-billion, and bednights rising to 5.2-million. **Limpopo** recorded an increase in overnight trips to 1.8-million, with total spend amounting to R2.2-billion (-28.6%).

In terms of the other provinces, **North West** recorded moderate to strong growth across all key indicators. **Free State** recorded growth in trips, but declines across all other key indicators. **Mpumalanga** experienced declines across all key indicators, with substantial drops in spend, bednights, and average length of stay. Finally, the **Northern Cape** saw increases in the number of trips, but spend and average spend per trip declined considerably.

PROVINCIAL PERFORMANCE

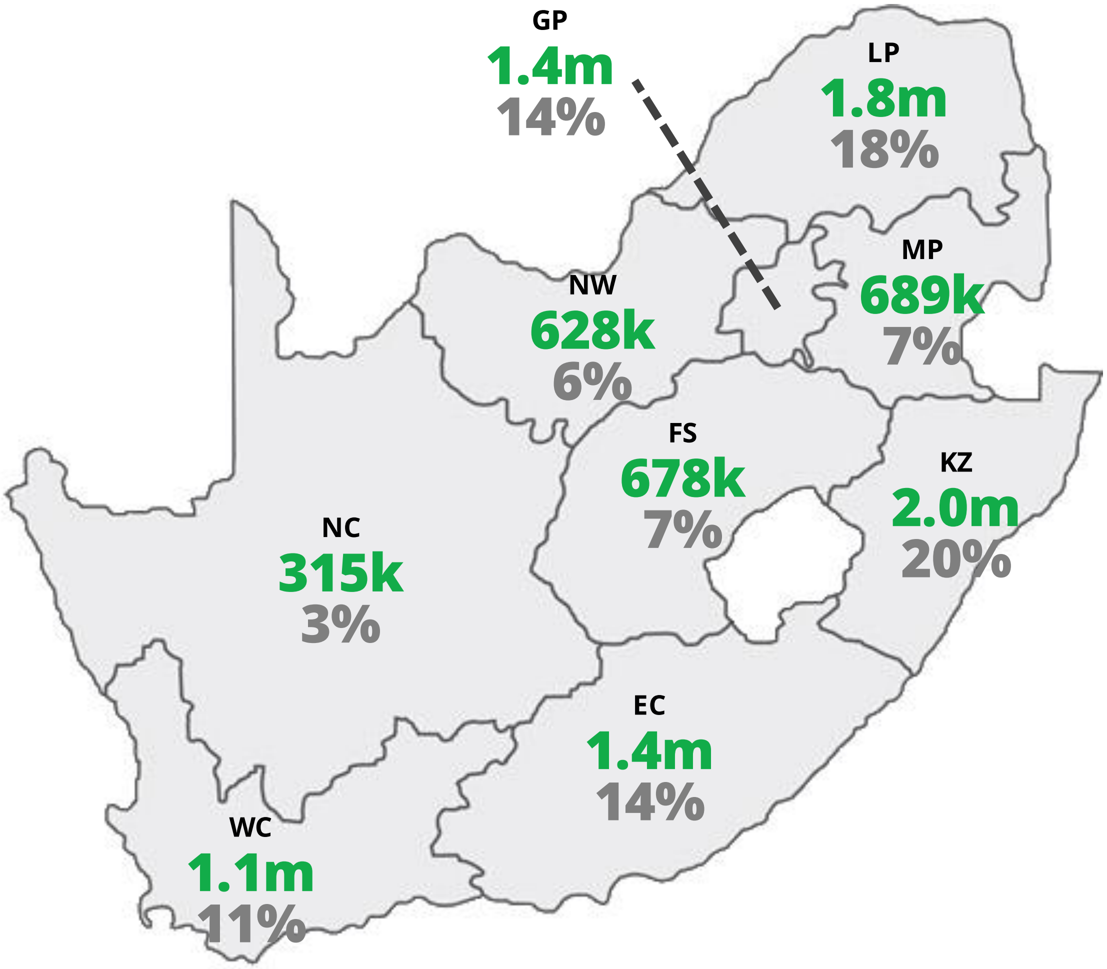
In Q1 2026, the total number of overnight trips across South Africa's nine provinces was 10-million.

The top four provinces visited as main destinations accounted for 66% (6.6-million) of all overnight trips. KwaZulu-Natal emerged as the leading main destination province, recording the highest number of overnight trips at 2.0-million (20%), followed by Limpopo with 1.8-million (18%), the Eastern Cape and Gauteng, each with 1.4-million (14%).

The Western Cape was the only other province to record over 1-million overnight trips in Q1 2026.

The Northern Cape was the least visited province as a main destination, with 315k (3%) trips, followed by Mpumalanga with 689k (7%), Free State with 678k (7%), and North West with 628k (6%).

OVERNIGHT TRIPS BY MAIN DESTINATION PROVINCE: Q1 2026



PROVINCIAL PERFORMANCE

PROVINCES VISITED DURING STOP-OVERS

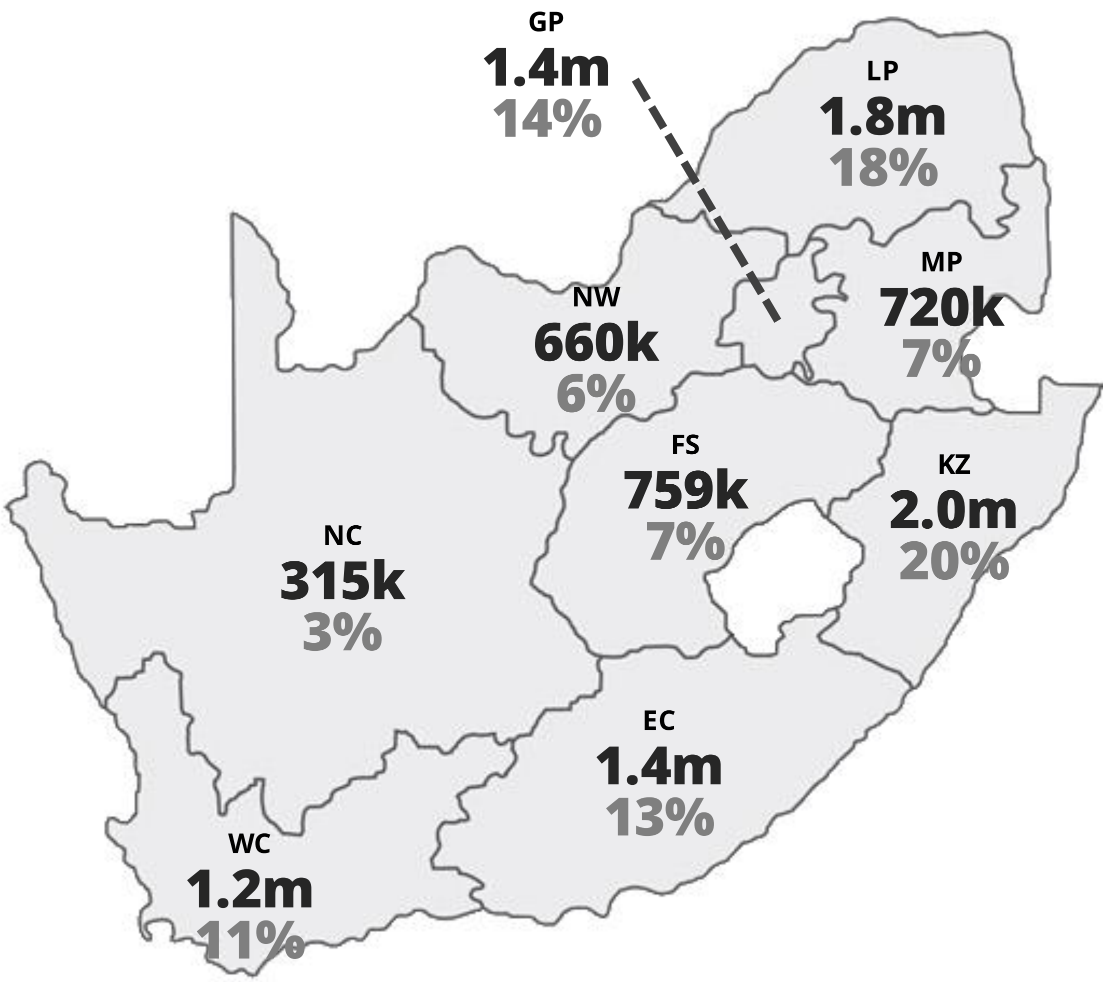
In Q1 2026, when including provinces visited during stop-overs, where some form of economic activity occurred en route to the main destination, the total rises to 10.3-million visits.

Only the Western Cape recorded 1-million or more visits, including economically active stop-overs, overnight stays, and main-destination trips, with 1.2-million visits (11%).

The Free State recorded 678k trips as a main destination and 759k visits overall. Mpumalanga recorded 689k trips as a main destination and 720k visits overall. The North West recorded 628k trips as a main destination and 660k visits overall.

The Eastern Cape, Gauteng, KwaZulu-Natal, Limpopo, and the Northern Cape did not record stop-over visits in Q1 2026.

PROVINCES VISITED: Q1 2026



PROVINCIAL PERFORMANCE

INTRA- AND INTER-PROVINCE TRAVEL

The highest proportions of domestic trips taken by residents within their own provinces were recorded in KwaZulu-Natal (80.9%) and Mpumalanga (71.0%).

The Eastern Cape (57.5%) and the Western Cape (56.4%) recorded relatively high levels of intra-provincial domestic travel, with more than half of trips originating from their own residents. Moderate levels of intra-provincial travel were observed in the Northern Cape (46.2%), Limpopo (42.0%) and the North West (41.2%). Gauteng (35.6%) and the Free State (29.2%) recorded the lowest proportions of intra-provincial travel.

Gauteng functions as South Africa's primary source of domestic tourism flows, consistently supplying high proportions of travellers to multiple provinces. At the same time, it receives inflows from all provinces, reinforcing its dual role as both the dominant origin market and a key destination hub within the domestic tourism system.

In Q1 2026. Gauteng contributed 53.3% of domestic trips to the North West, 44.9% to the Free State and 40.7% to Limpopo. It also contributed substantially to the Western Cape (20.4%) and the Eastern Cape (20.1%). In addition to trips from Gauteng, trips to the Free State also originated from KwaZulu-Natal. Trips to Gauteng originated from all provinces, with the largest proportions coming from Limpopo, KwaZulu-Natal and Mpumalanga.

Combined inflows from the Western Cape, the Eastern Cape and the North West accounted for 53.8% of domestic trips to the Northern Cape.

INTRA- AND INTER-PROVINCE TRAVEL: Q1 2026

Proportion of Trips to Destination Province

DESTINATION PROVINCE

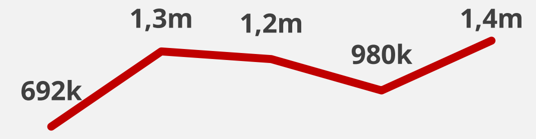
SOURCE PROVINCE

	EC	FS	GT	KZ	LM	MP	NC	NW	WC
EC	57.5%	0.0%	1.6%	0.0%	0.9%	0.0%	12.6%	2.8%	6.7%
FS	1.1%	29.2%	5.6%	6.2%	0.0%	0.0%	0.0%	0.0%	0.4%
GT	20.1%	44.9%	35.6%	8.0%	40.7%	13.8%	0.0%	53.3%	20.4%
KZ	5.1%	13.1%	10.5%	80.9%	0.3%	11.5%	0.0%	0.0%	2.3%
LM	0.0%	0.0%	23.9%	0.0%	42.0%	0.0%	0.0%	0.0%	8.7%
MP	0.0%	0.0%	9.7%	2.8%	8.6%	71.0%	0.0%	0.0%	0.0%
NC	0.0%	4.6%	5.6%	0.0%	0.0%	3.7%	46.2%	2.7%	5.1%
NW	0.0%	8.2%	3.6%	1.5%	4.9%	0.0%	10.8%	41.2%	0.0%
WC	16.2%	0.0%	3.9%	0.6%	2.5%	0.0%	30.4%	0.0%	56.4%

EASTERN CAPE **1.4m** **+40.1%**

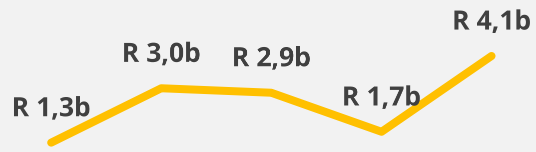
DESTINATION PROVINCE: EASTERN CAPE

OVERNIGHT TRIPS



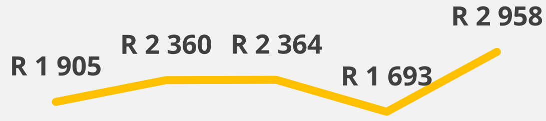
1.4m
+40.1%

OVERNIGHT SPEND



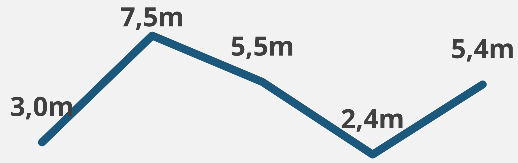
R 4.1b
+144.9%

AVERAGE OVERNIGHT SPEND



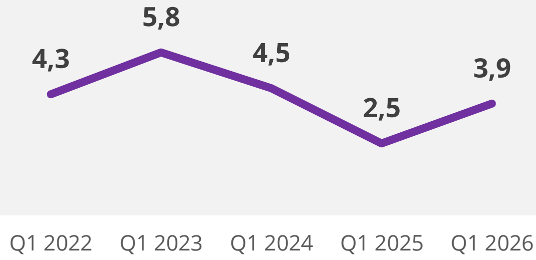
R 2,958
+74.8%

BEDNIGHTS



5.4m
+121.0%

LENGTH OF STAY



3.9
+57.7%

Key growth and change rates shown in this report are in comparison to 2025.
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 1.4m +40.1%

DESTINATION PROVINCE: EASTERN CAPE

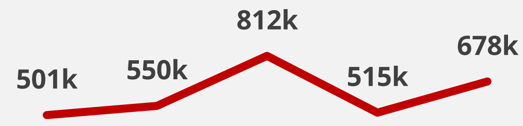
OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	361k	26.3%	+83.6%
VFR	787k	57.3%	+74.7%
PROFESSIONAL / BUSINESS	139k	10.1%	+294.6%
MICE	18k	1.3%	+147.1 %
MEDICAL	-	- %	- %
RELIGIOUS	51k	3.7%	-44.0%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 766.9m	18.9%	+39.7%
VFR	R 1.2b	30.7%	+100.6%
PROFESSIONAL / BUSINESS	R 2.0b	48.0%	+2299.0%
MICE	R 73.6m	1.8%	+802.3%
MEDICAL	R -	- %	- %
RELIGIOUS	R 15.7m	0.4%	-86.7%

Key growth and change rates shown in this report are in comparison to 2025.
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

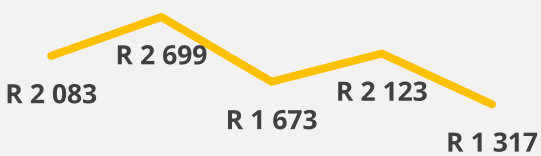


678k
+31.7%

OVERNIGHT SPEND

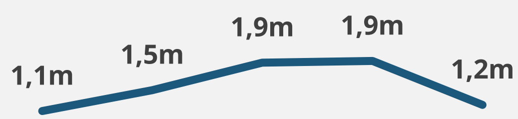
R 892.7m
-18.3%

AVERAGE OVERNIGHT SPEND



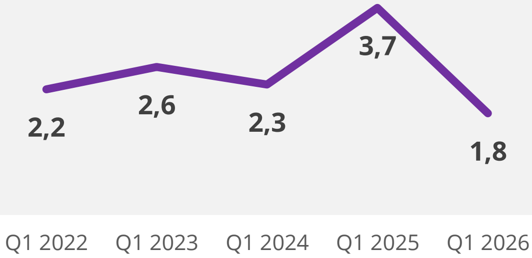
R 1,317
-38.0%

BEDNIGHTS



1.2m
-36.3%

LENGTH OF STAY



1.8
-51.7%

Key growth and change rates shown in this report are in comparison to 2025.
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

678k +31.7%

DESTINATION PROVINCE: **FREE STATE**

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	98k	14.4%	+75.2%
VFR	400k	59.0%	+53.6%
PROFESSIONAL / BUSINESS	-	- %	- %
MICE	61k	9.0%	-49.6%
MEDICAL	-	- %	- %
RELIGIOUS	58k	8.5%	+34.6%

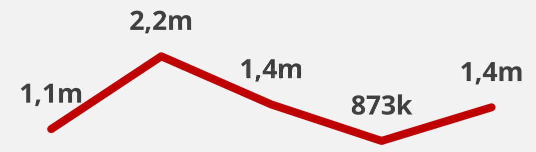
OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 268.1m	30.0%	+114.8%
VFR	R 404.8m	45.3%	-16.4%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R 136.4m	15.3%	-65.7%
MEDICAL	R -	- %	- %
RELIGIOUS	R 24.4m	2.7%	-61.7%

Key growth and change rates shown in this report are in comparison to 2025.
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 1.4m +60.7%

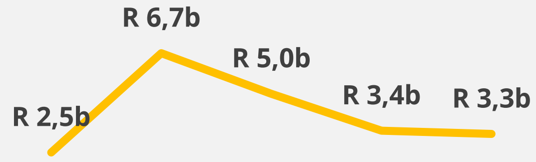
DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS



1.4m
+60.7%

OVERNIGHT SPEND

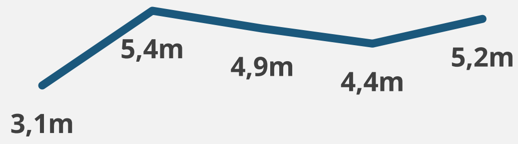


R 3.3b
-4.0%

AVERAGE OVERNIGHT SPEND

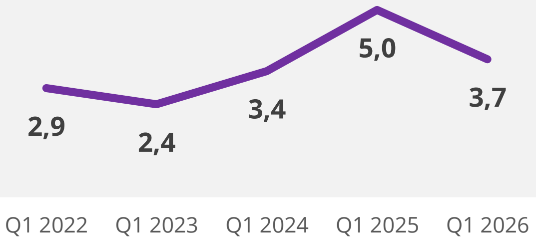
R 2,335
-40.3%

BEDNIGHTS



5.2m
+17.8%

LENGTH OF STAY



3.7
-26.7%

Key growth and change rates shown in this report are in comparison to 2025.
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

1.4m +60.7%

DESTINATION PROVINCE: GAUTENG

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	285k	20.3%	+75.7%
VFR	803k	57.3%	+35.4%
PROFESSIONAL / BUSINESS	128k	9.1%	+258.3%
MICE	39k	2.8%	+25.8%
MEDICAL	-	- %	- %
RELIGIOUS	55k	3.9%	+44.5%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 411.0m	12.5%	-58.6%
VFR	R 1.0b	31.1%	-12.1%
PROFESSIONAL / BUSINESS	R 396.0m	12.1%	-26.4%
MICE	R 665.8m	20.3%	+111.8%
MEDICAL	R -	- %	- %
RELIGIOUS	R 37.8m	1.2%	-89.1%

Key growth and change rates shown in this report are in comparison to 2025.
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.

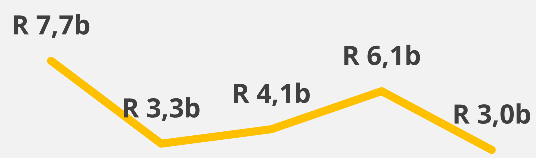
KWAZULU-NATAL 2.0m +6.6%

DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS

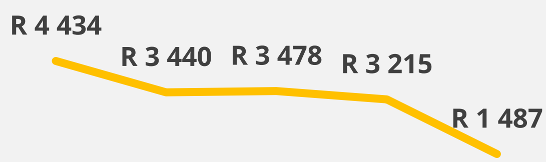
2.0m
+6.6%

OVERNIGHT SPEND



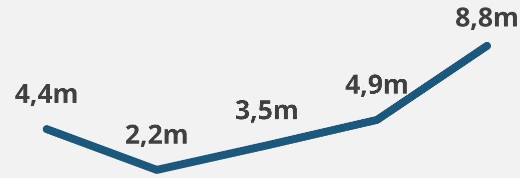
R 3.0b
-50.7%

AVERAGE OVERNIGHT SPEND



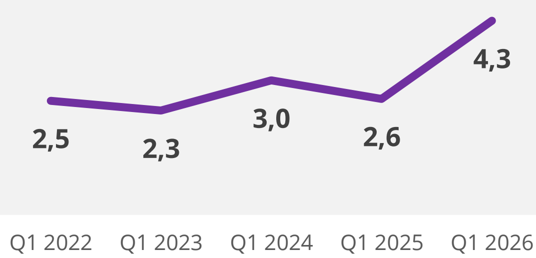
R 1,487
-53.8%

BEDNIGHTS



8.8m
+80.2%

LENGTH OF STAY



4.3
+69.0%

Key growth and change rates shown in this report are in comparison to 2025.
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 2.0m +6.6%

DESTINATION PROVINCE: KWAZULU-NATAL

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	568k	28.0%	+99.2%
VFR	820k	40.4%	-37.5%
PROFESSIONAL / BUSINESS	38k	1.9%	-75.4%
MICE	232k	11.5%	- %
MEDICAL	-	- %	- %
RELIGIOUS	68k	3.4%	-54.4%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 1.7b	54.9%	-57.6%
VFR	R 657.3m	21.8%	-65.9%
PROFESSIONAL / BUSINESS	R 64.0m	2.1%	-49.4%
MICE	R 410.0m	13.6%	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 25.2m	0.8%	-84.0%

Key growth and change rates shown in this report are in comparison to 2025.
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 **1.8m** +18.6%

DESTINATION PROVINCE: LIMPOPO

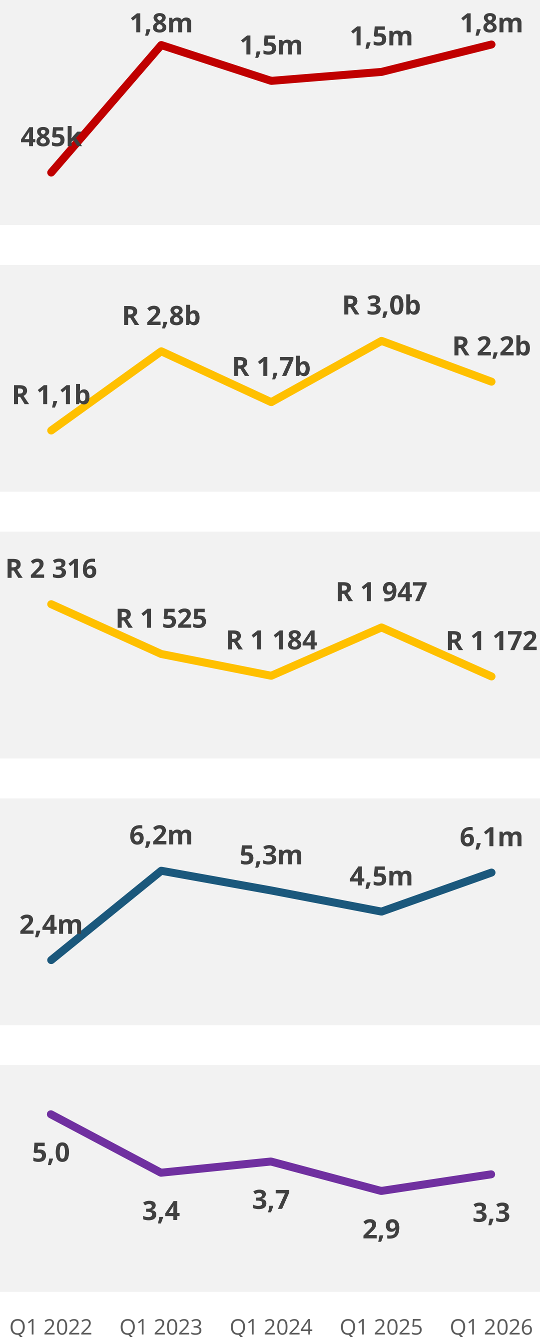
OVERNIGHT TRIPS
1.8m
+18.6%

OVERNIGHT SPEND
R 2.2b
-28.6%

AVERAGE OVERNIGHT SPEND
R 1,172
-39.8%

BEDNIGHTS
6.1m
+37.2%

LENGTH OF STAY
3.3
+15.7%



Key growth and change rates shown in this report are in comparison to 2025.
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 1.8m +18.6%

DESTINATION PROVINCE: LIMPOPO

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	55k	3.0%	-72.4%
VFR	1.5m	81.7%	+38.0%
PROFESSIONAL / BUSINESS	47k	2.5%	-74.9%
MICE	57k	3.1%	+10.3%
MEDICAL	91k	4.9%	- %
RELIGIOUS	59k	3.2%	+159.7%

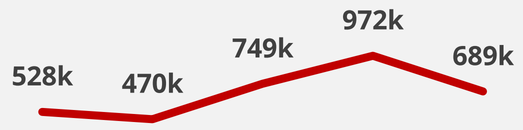
OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 242.6m	11.3%	-55.5%
VFR	R 1.7b	77.3%	-0.2%
PROFESSIONAL / BUSINESS	R 46.8m	2.2%	-91.4%
MICE	R 9.7m	0.5%	-95.8%
MEDICAL	R 36.2m	1.7%	- %
RELIGIOUS	R 94.7m	4.4%	+232.3%

Key growth and change rates shown in this report are in comparison to 2025.
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 **689k** -29.2%

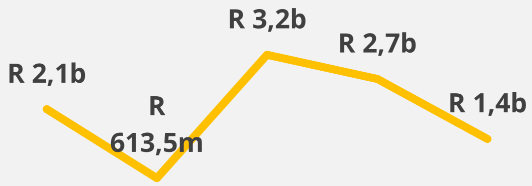
DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS



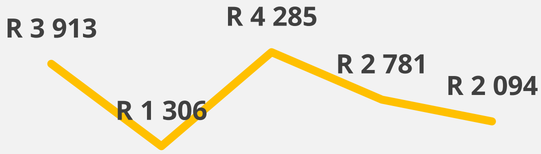
689k
-29.2%

OVERNIGHT SPEND



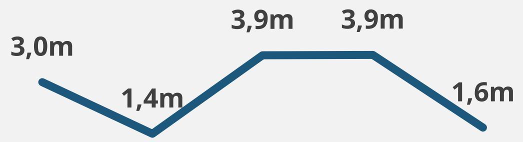
R 1.4b
-46.6%

AVERAGE OVERNIGHT SPEND



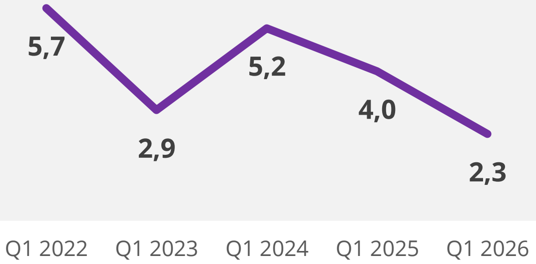
R 2,094
-24.7%

BEDNIGHTS



1.6m
-59.5%

LENGTH OF STAY



2.3
-42.8%

Key growth and change rates shown in this report are in comparison to 2025.
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

689k -29.2%

DESTINATION PROVINCE: MPUMALANGA

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	235k	34.2%	+35.8%
VFR	297k	43.1%	-50.5%
PROFESSIONAL / BUSINESS	-	- %	- %
MICE	-	- %	- %
MEDICAL	62k	9.0%	- %
RELIGIOUS	95k	13.7%	-11.0%

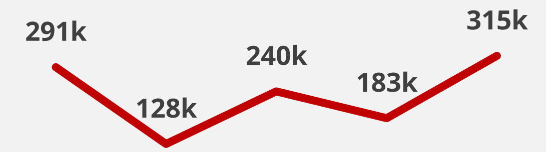
OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 834.8m	57.9%	-22.9%
VFR	R 394.5m	27.4%	-66.9%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R -	- %	- %
MEDICAL	R 92.7m	6.4%	- %
RELIGIOUS	R 120.1m	8.3%	+289.5%

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 **315k** +72.1%

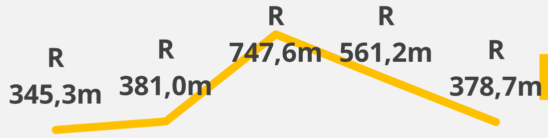
DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS



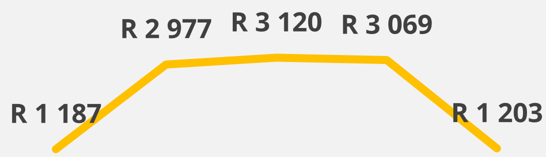
315k
+72.1%

OVERNIGHT SPEND



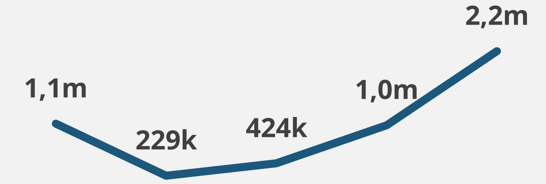
R 378.7m
-32.5%

AVERAGE OVERNIGHT SPEND



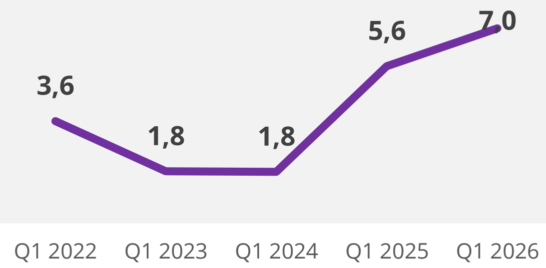
R 1,203
-60.8%

BEDNIGHTS



2.2m
+114.1%

LENGTH OF STAY



7.0
+24.4%

Key growth and change rates shown in this report are in comparison to 2025.
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

315k +72.1%

DESTINATION PROVINCE: NORTHERN CAPE

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	-	- %	- %
VFR	238k	75.7%	+146.5%
PROFESSIONAL / BUSINESS	-	- %	- %
MICE	-	- %	- %
MEDICAL	20k	6.3%	- %
RELIGIOUS	57k	18.1%	+98.1%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R -	- %	- %
VFR	R 282.2m	74.5%	+67.9%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R -	- %	- %
MEDICAL	R 39.6m	10.5%	- %
RELIGIOUS	R 56.9m	15.0%	-48.8%

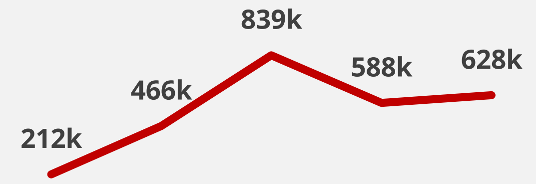
Key growth and change rates shown in this report are in comparison to 2025.
Results reported for Domestic Overnight Spend and Average Overnight Spend are based on the total spend of the journey and not exclusively to the Main Destination.

NORTH WEST

628k +6.8%

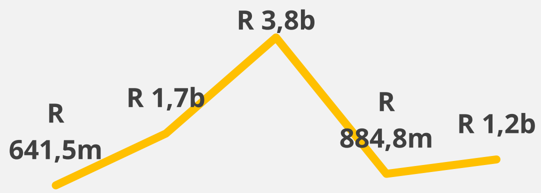
DESTINATION PROVINCE: NORTH WEST

OVERNIGHT TRIPS



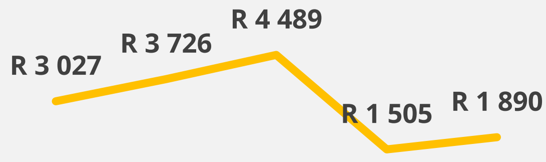
628k
+6.8%

OVERNIGHT SPEND



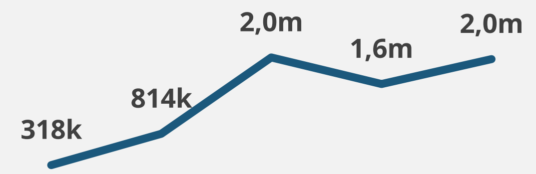
R 1.2b
+34.1%

AVERAGE OVERNIGHT SPEND



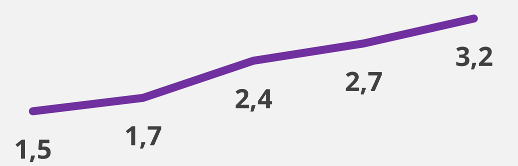
R 1,890
+25.6%

BEDNIGHTS



2.0m
+24.6%

LENGTH OF STAY



3.2
+16.7%

Q1 2022 Q1 2023 Q1 2024 Q1 2025 Q1 2026

Key growth and change rates shown in this report are in comparison to 2025.
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

628k +6.8%

DESTINATION PROVINCE: NORTH WEST

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	69k	11.0%	-17.6%
VFR	499k	79.5%	+101.0%
PROFESSIONAL / BUSINESS	-	- %	- %
MICE	-	- %	- %
MEDICAL	-	- %	- %
RELIGIOUS	54k	8.7%	-13.6%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 74.2m	6.3%	-35.6%
VFR	R 1.0b	88.1%	+98.3%
PROFESSIONAL / BUSINESS	R -	- %	- %
MICE	R -	- %	- %
MEDICAL	R -	- %	- %
RELIGIOUS	R 38.0m	3.2%	+4.2%

Key growth and change rates shown in this report are in comparison to 2025.
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.

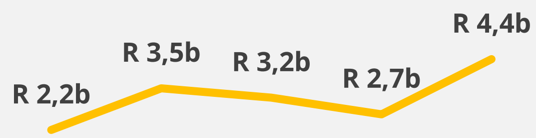
WESTERN CAPE 1.1m +38.1%

DESTINATION PROVINCE: WESTERN CAPE

OVERNIGHT TRIPS

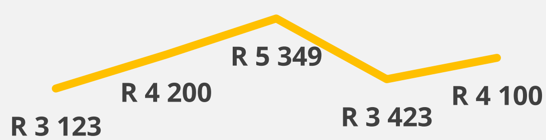
1.1m
+38.1%

OVERNIGHT SPEND



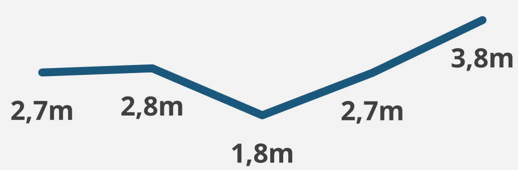
R 4.4b
+65.4%

AVERAGE OVERNIGHT SPEND



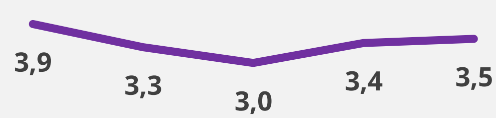
R 4,100
+19.8%

BEDNIGHTS



3.8m
+41.8%

LENGTH OF STAY



3.5
+2.7%

Q1 2022 Q1 2023 Q1 2024 Q1 2025 Q1 2026

Key growth and change rates shown in this report are in comparison to 2025.
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 1.1m +38.1%

DESTINATION PROVINCE: **WESTERN CAPE**

OVERNIGHT TRIPS BY PURPOSE	TRIPS	SHARE	% YOY
HOLIDAY	594k	55.4%	+65.0%
VFR	367k	34.3%	+26.1%
PROFESSIONAL / BUSINESS	20k	1.9%	-65.6%
MICE	18k	1.6%	+24.8%
MEDICAL	7k	0.7%	- %
RELIGIOUS	48k	4.5%	-8.0%

OVERNIGHT SPEND BY PURPOSE	SPEND	SHARE	% YOY
HOLIDAY	R 2.0b	45.7%	+52.1%
VFR	R 2.1b	48.1%	+259.7%
PROFESSIONAL / BUSINESS	R 202.5m	4.6%	-68.0%
MICE	R 21.2m	0.5%	+15.2%
MEDICAL	R 5.8m	0.1%	- %
RELIGIOUS	R 24.1m	0.5%	-75.5%

Key growth and change rates shown in this report are in comparison to 2025.
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.

JAN-MAR

2026

SECTION 5

DOMESTIC DAY TRIPS

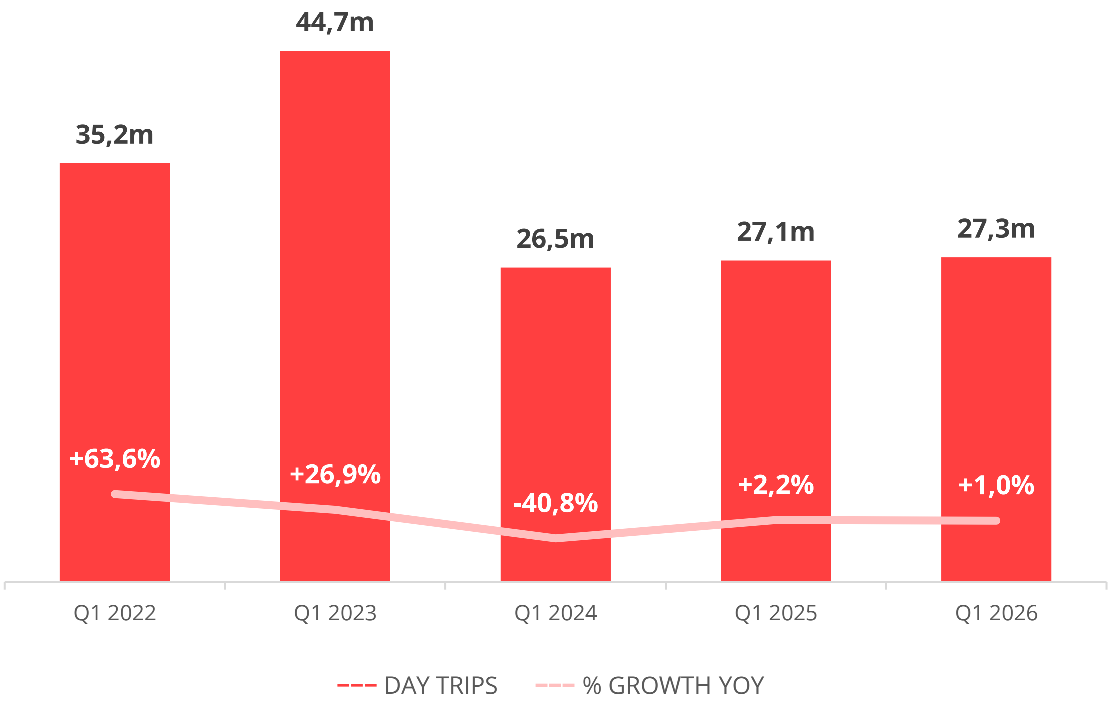
DAY TRIPS 27.3m +1.0%

In Q1 2026, domestic day trips saw marginal growth of 1.0%, reaching 27.3-million.

Day trips have now hovered around the 27-million mark year-on-year for three consecutive Q1 periods (2024, 2025, and 2026) and remain below the 44.7-million recorded in Q1 2023.

The overall increase in day trips was relatively small, indicating that travel patterns have stabilised rather than entered a strong growth phase.

DAY TRIPS: Q1 2022 – Q1 2026



DAY TRIPS

27.3m +1.0%

In Q1 2026, the primary purposes for day trips were visiting friends and relatives (VFR), holiday trips, and personal shopping.

VFR increased to 11.5-million day trips (+37.5%) and accounted for 42.2% of total day trips compared to Q1 2025.

Holiday trips increased by +7.9%, reaching 6.0-million trips and accounting for 21.9% of total day trips.

Following a strong rise in Q1 2025, personal shopping trips declined by -31.0%, falling to 4.2-million day trips. Their share of total day trips also fell to 15.2%.

Day trips for professional or business purposes experienced a moderate increase to 2.5-million, while business shopping trips increased from 261k to 777k.

The strong increase in VFR day trips and the moderate increase in holiday day trips are positive indications of movement in day trip activity, although the day-trip market remains in a relatively stagnant phase.

Q1 2026 saw increases in both overnight trips and day trips for VFR and holiday purposes.

DAY TRIPS BY PURPOSE: Q1 2025 v Q1 2026

Purpose	Q1 2025	Q1 2026	Change
VFR	8.4m 31.0%	11.5m 42.2%	+37.5%
HOLIDAY	5.6m 20.5%	6.0m 21.9%	+7.9%
PERSONAL SHOPPING	6.0m 22.3%	4.2m 15.2%	-31.0%
PROFESSIONAL / BUSINESS	2.3m 8.4%	2.5m 9.0%	+7.9%
RELIGIOUS	744k 2.8%	782k 2.9%	+5.1%
BUSINESS SHOPPING	261k 1.0%	777k 2.8%	+197.4%

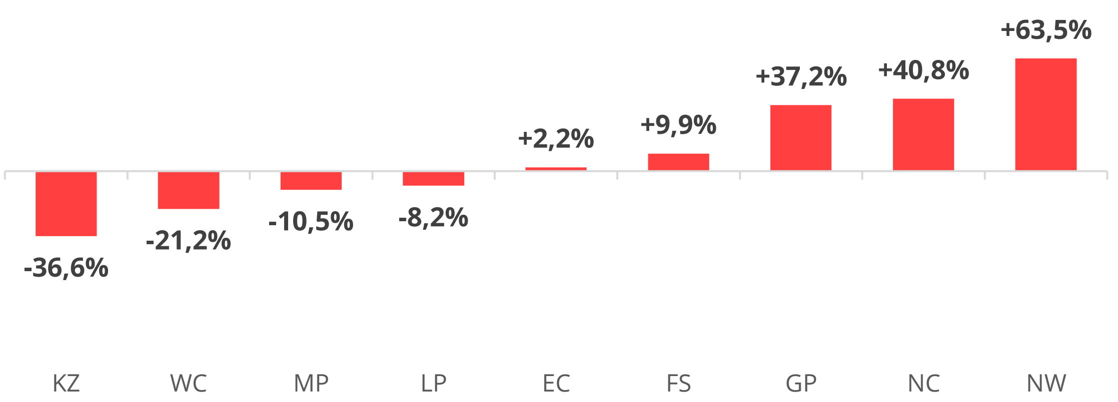
DAY TRIPS 27.3m +1.0%

In Q1 2026, the largest number of day trips from the province of origin (source province) were recorded in Gauteng (7.2-million) and Limpopo (4.9-million), followed by Mpumalanga (3.0-million) and KwaZulu-Natal (2.9-million).

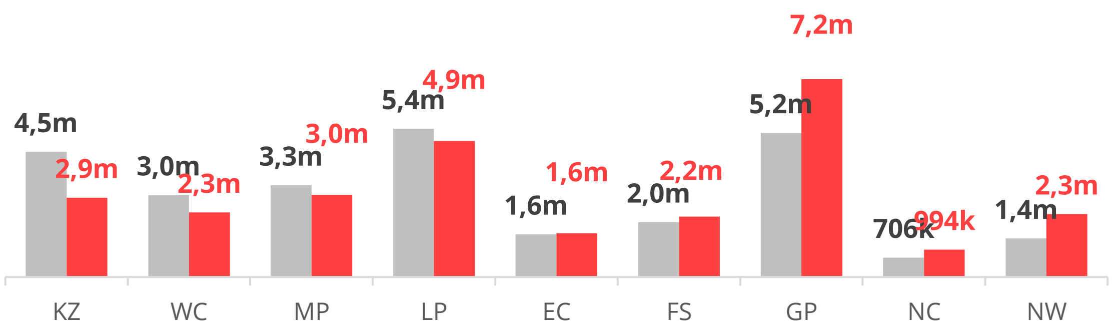
Three of the four source provinces with the largest volumes of day trips recorded negative growth rates in Q1 2026. Following its decline in Q1 2025, KwaZulu-Natal recorded the largest decline in Q1 2026, decreasing by -36.6% from 4.5-million day trips to 2.9-million. Negative growth rates were also observed in Mpumalanga (-10.5%), Limpopo (-8.2%), and the Western Cape (-21.2%).

After recording growth in Q1 2025, Gauteng expanded further by +37.2% in Q1 2026, increasing from 5.2-million to 7.2-million day trips. Recovering from its substantial decline in Q1 2025, the North West regained ground by +63.5% to reach 2.3-million day trips. The Free State (+9.9%) and the Eastern Cape (+2.2%) recorded moderate growth. The Northern Cape continued its upward trend, growing to 994k day trips.

SOURCE PROVINCE GROWTH RATE: Q1 2025 v Q1 2026



DAY TRIPS FROM SOURCE PROVINCE: Q1 2025 v Q1 2026



DAY TRIPS

27.3m +1.0%

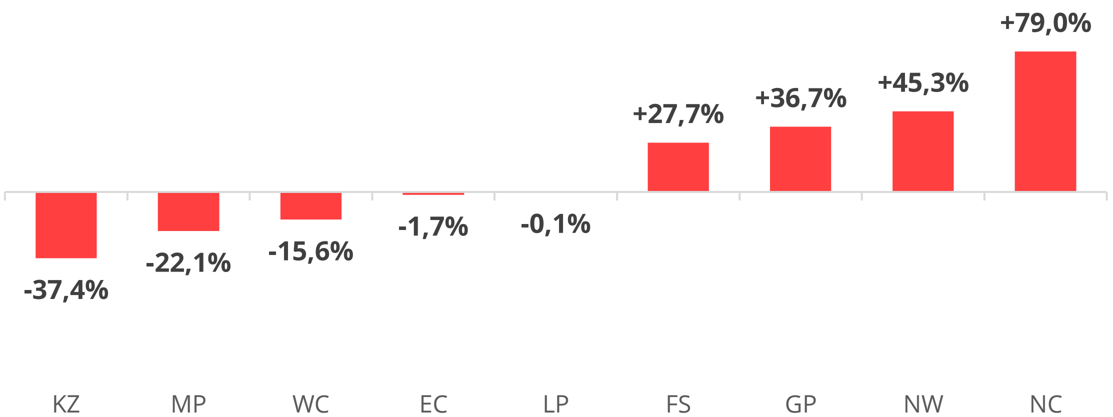
In Q1 2026, domestic day trips saw marginal growth of +1.0%, reaching 27.3-million.

Gauteng was the largest destination province in Q1 2026, growing by +36.7% from 4.7-million to 6.4-million day trips. Limpopo followed with 5.2-million trips, remaining stable compared to Q1 2025. KwaZulu-Natal recorded 3.0-million trips, despite a decline of -37.4%. Mpumalanga followed with 2.8-million trips (-22.1%), while the Western Cape declined to 2.5-million trips (-15.6%). The Free State increased to 2.5-million trips. The North West rebounded strongly by +45.3%, reaching 2.3-million trips, and the Northern Cape continued its upward trend, growing to 923k trips.

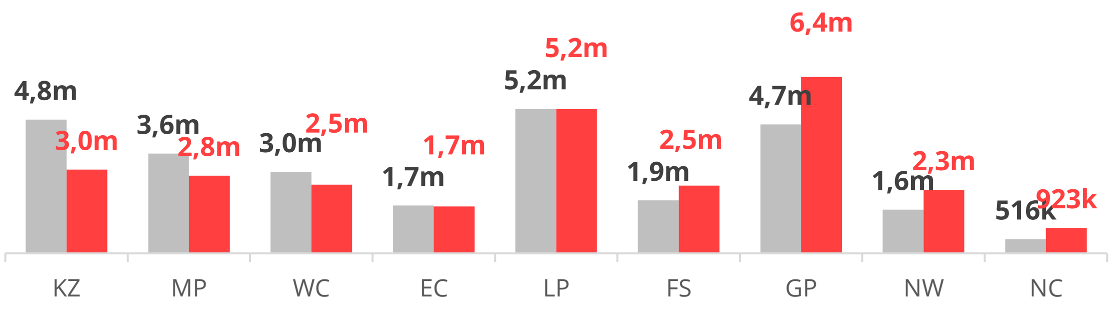
Overall, KwaZulu-Natal, Mpumalanga, the Western Cape, and the Eastern Cape experienced negative growth as destination provinces for day trips in Q1 2026. The Eastern Cape and Limpopo recorded marginal declines in Q1 2026, with trip volumes remaining broadly in line with Q1 2025.

Gauteng and select inland provinces (North West and Free State) gained share, indicating stronger demand for convenient, accessible day-trip experiences. Traditional coastal and tourism-heavy provinces such as KwaZulu-Natal, the Western Cape, and Mpumalanga saw substantial declines, which may suggest a relative shift in demand away from longer-distance day trips toward urban and regional leisure options.

DESTINATION PROVINCE GROWTH RATE: Q1 2025 v Q1 2026



DAY TRIPS TO DESTINATION PROVINCE: Q1 2025 v Q1 2026



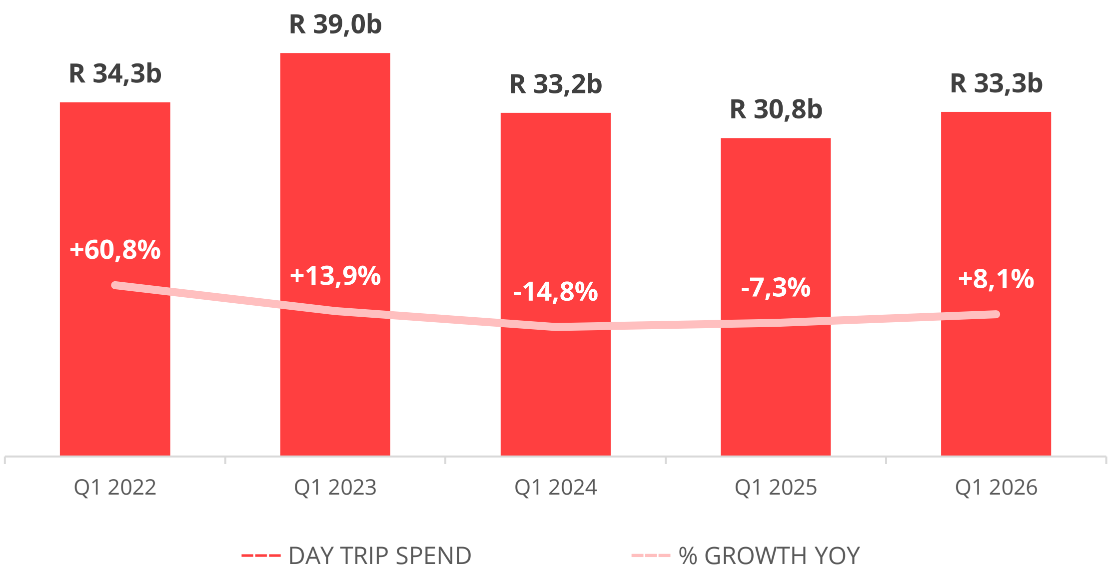
DAY TRIPS

27.3m +1.0%

Day trip spending grew by +8.1%, rising from R30.8-billion in Q1 2025 to R33.3-billion in Q1 2026, although it remains below the R39.0-billion recorded in Q1 2023.

The +8.1% growth reflects higher day trip spend in Q1 2026, supported by a +7.1% increase in average spend per trip from R1,139 to R1,219, pointing more to increased spend per trip than a clear expansion in travel activity.

DAY TRIP SPEND: Q1 2022 – Q1 2026



DAY TRIPS 27.3m +1.0%

In Q1 2026, domestic day trips saw marginal growth of +1.0%, reaching 27.3-million.

In the top position was Gauteng, recording the highest trip volumes at 6.4-million day trips and the second-highest day-trip spend of R6.6-billion, followed by Limpopo with 5.2-million trips and the highest spend of R7.0-billion. KwaZulu-Natal came in third position with 3.0-million trips and a spend of R4.1-billion.

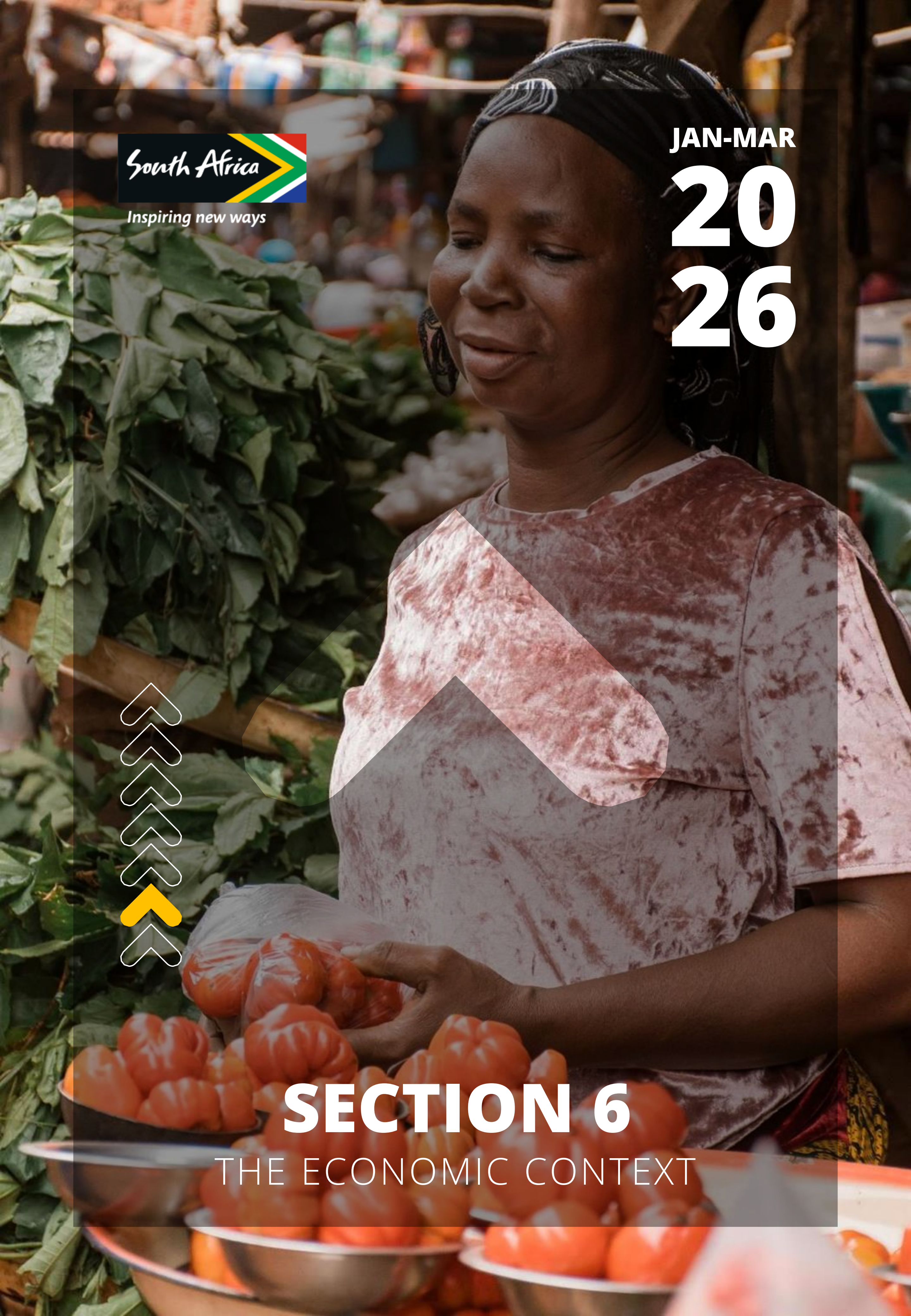
At the lower end was the Eastern Cape, with 1.7-million day trips and a spend of R1.9-billion, followed by the Northern Cape, which recorded the lowest day-trip volumes (923k) and the lowest spend (R1.6-billion).

The Free State, Mpumalanga, North West, and the Western Cape recorded day trip spend ranging between R2.8-billion and R3.2-billion.

The Northern Cape recorded the highest average spend, at R1,739 per day trip, while Gauteng recorded the lowest, at R1,035.

DAY TRIP PERFORMANCE INDICATORS BY DESTINATION PROVINCE: Q1 2026

	TRIPS	SPEND	AVG SPEND
EC	1.7m	R 1.9b	R 1,127
FS	2.5m	R 3.1b	R 1,245
GP	6.4m	R 6.6b	R 1,035
KZ	3.0m	R 4.1b	R 1,367
LP	5.2m	R 7.0b	R 1,343
MP	2.8m	R 3.2b	R 1,131
NC	923k	R 1.6b	R 1,739
NW	2.3m	R 2.8b	R 1,231
WC	2.5m	R 3.0b	R 1,188



South Africa
Inspiring new ways

JAN-MAR
2026

SECTION 6
THE ECONOMIC CONTEXT

THE ECONOMIC CONTEXT

The South African economy significantly affects domestic tourism. Key economic metrics influencing travel in **January to March 2026** 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 | 3.1%

South Africa's annual inflation rate rose slightly to 3.1% in March 2026, driven primarily by higher costs in housing, utilities, and financial services.[2]

UNEMPLOYMENT RATE | 32.7%

The official unemployment rate increased by 1.3 percentage points to 32.7% in Q1:2026 compared to Q4:2025. The official unemployment rate among South Africa's youth (aged 15-34) stands at 45.8% in Q1:2026.[3]

REPO RATE | 6.75%

The South African Reserve Bank (SARB) maintained the repo rate at 6.75% in March 2026, marking a second consecutive pause.[4]

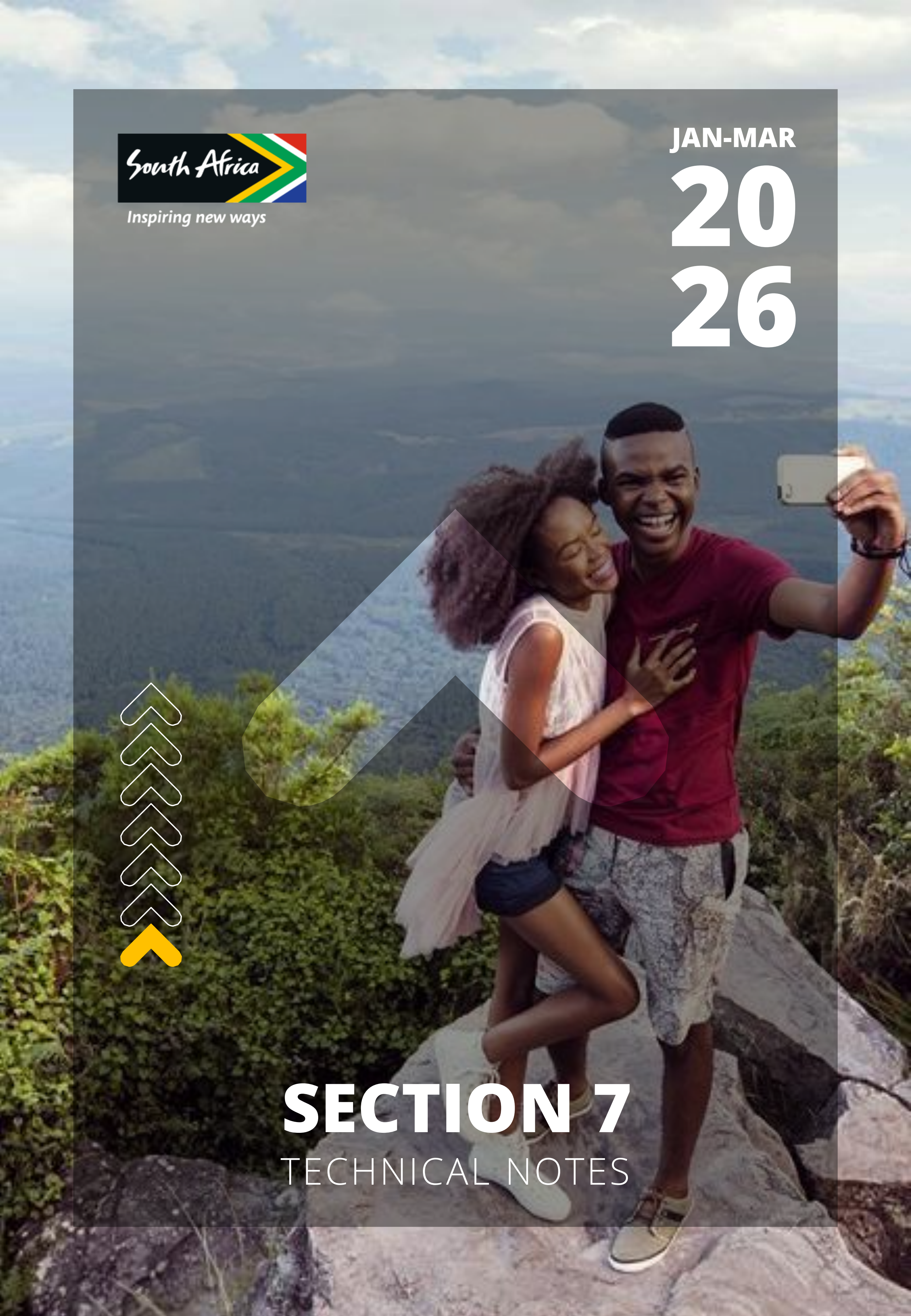
PETROL PRICE | R20.30 /litre

Petrol prices continued to fluctuate, with inland prices increasing to R20.30 per litre and coastal prices to R19.47 per litre on 04 March 2026.[5]

HOUSEHOLD DEBT-TO-INCOME | 61.8%

South African household debt as a percentage of nominal disposable income edged higher from 61.5% in the third quarter of 2025 to 61.8% in the fourth quarter. Households' cost of servicing debt fell to 8.4% from 8.5% during the same period.[6]

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



South Africa
Inspiring new ways

JAN-MAR
2026

SECTION 7
TECHNICAL NOTES

TECHNICAL NOTES

Response rates at a provincial level against the quarterly quotas which were all achieved for Q1 2026.

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)	188	188	100%
Northern Cape (NC)	120	120	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 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 **January, February, and March 2026** 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:

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

wh er 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:

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

wh d 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.

Inspiring new ways

JAN-MAR 2026

APPENDIX A

MONTHLY SHARE OF OVERNIGHT TRIPS & TRAVELLERS

APPENDIX A
MONTHLY SHARE OF OVERNIGHT TRIPS & TRAVELLERS

SHARE OF OVERNIGHT TRAVELLERS, BY MONTH

		Travellers		
		Q1 2024	Q1 2025	Q1 2026
Travel Month	January	32.5%	24.1%	33.4%
	February	32.9%	35.1%	33.9%
	March	34.6%	40.9%	32.7%

SHARE OF OVERNIGHT TRIPS, BY MONTH

		Overnight Trips		
		Q1 2024	Q1 2025	Q1 2026
Travel Month	January	32.6%	25.3%	33.6%
	February	31.9%	34.4%	33.8%
	March	35.5%	40.3%	32.6%

South Africa

Inspiring new ways

JAN-MAR

2026

APPENDIX B

PURPOSE OF TRIP BY SOCIO-DEMOGRAPHIC INDICATORS

APPENDIX B

PURPOSE OF TRIP BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY PURPOSE

		Q1 2024			Q1 2025			Q1 2026		
		VFR	Holiday	MICE	VFR	Holiday	MICE	VFR	Holiday	MICE
Highest Level of Education	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	No school	0.0%	8.7%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
	Some primary school	4.8%	0.0%	0.0%	1.1%	0.5%	0.0%	0.9%	0.3%	0.0%
	Primary school completed	5.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
	Some high school	41.7%	12.1%	0.0%	33.7%	11.5%	29.4%	25.4%	17.7%	13.5%
	High school completed	30.9%	31.5%	31.8%	31.4%	40.8%	29.5%	44.7%	37.8%	10.6%
	Some college	2.7%	5.2%	14.4%	8.6%	1.5%	0.0%	6.6%	0.8%	0.0%
	College completed	5.7%	16.1%	13.4%	6.7%	16.7%	20.2%	9.1%	12.0%	13.5%
	Some university	0.6%	3.7%	17.5%	2.6%	2.9%	0.0%	2.0%	4.1%	0.0%
	Technikon diploma / degree	3.8%	6.6%	1.5%	6.2%	1.8%	0.0%	3.1%	10.0%	0.0%
	University degree / diploma	3.2%	12.6%	6.8%	7.8%	22.1%	11.8%	6.4%	12.9%	62.4%
	Post-graduate degree	1.5%	2.9%	14.6%	1.5%	2.1%	9.1%	1.7%	4.4%	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	54.2%	40.9%	90.9%	57.2%	59.0%	83.3%	47.8%	62.3%	95.8%
	Female	45.8%	59.1%	9.1%	42.8%	41.0%	16.7%	52.2%	37.7%	4.2%
Marital Status	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	Single / Never married	56.2%	68.2%	9.1%	65.6%	52.6%	36.6%	65.3%	54.7%	33.6%
	Married / Living together	29.0%	18.1%	72.1%	26.3%	36.2%	39.0%	24.4%	34.9%	57.3%
	Divorced / Widowed / Separated	14.8%	13.7%	18.8%	8.1%	11.2%	24.4%	10.3%	10.4%	9.2%
	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	28.3%	34.4%	3.7%	22.7%	24.9%	25.9%	16.9%	30.4%	41.3%
	Children, dependent	60.4%	47.2%	75.6%	63.6%	61.2%	43.3%	63.4%	45.0%	8.2%
	Children, independent	3.2%	15.1%	20.7%	6.9%	12.4%	20.2%	9.4%	17.8%	9.2%
	Children, dependent + independen	8.0%	3.3%	0.0%	6.8%	1.4%	10.5%	10.2%	6.7%	41.3%
	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	6.4%	4.7%	0.0%	3.2%	7.5%	0.0%	2.9%	6.1%	0.0%
	R501 - R750	0.8%	2.5%	0.0%	0.0%	0.0%	0.0%	6.1%	0.3%	9.3%
	R751 - R1,000	5.2%	8.2%	0.0%	3.0%	0.3%	0.0%	5.5%	4.7%	0.0%
	R1,001 - R1,500	6.3%	5.6%	0.0%	8.9%	0.0%	0.0%	3.7%	4.0%	0.0%
	R1,501 - R2,000	15.7%	1.3%	0.0%	9.3%	0.0%	0.0%	9.1%	3.3%	1.7%
	R2,001 - R3,000	19.6%	14.8%	18.8%	10.0%	2.3%	16.6%	15.0%	6.7%	0.0%
	R3,001 - R5,000	11.4%	9.8%	4.5%	6.5%	13.8%	17.6%	16.7%	10.0%	17.6%
	R5,001 - R7,500	8.5%	4.2%	4.0%	7.9%	10.7%	0.0%	8.8%	10.4%	0.0%
	R7,501 - R10,000	10.7%	14.0%	0.0%	9.2%	7.7%	0.0%	5.0%	6.8%	41.3%
	R10,001 - R15,000	2.5%	3.5%	9.2%	9.0%	5.0%	0.0%	5.0%	9.6%	14.4%
	R15,001 - R20,000	5.1%	5.3%	2.3%	7.4%	7.0%	29.3%	3.7%	5.1%	4.0%
	R20,001 - R30,000	1.7%	9.3%	16.2%	6.6%	3.8%	10.5%	3.1%	9.4%	0.0%
	R30,001+	1.3%	8.9%	43.1%	2.3%	5.6%	18.8%	1.5%	4.8%	9.2%
	Refused to answer	2.5%	3.1%	0.0%	9.2%	32.1%	7.2%	12.9%	15.2%	2.5%
	Don't Know / Uncertain	0.2%	2.4%	1.9%	3.1%	2.9%	0.0%	0.0%	0.0%	0.0%
	No income	2.3%	2.5%	0.0%	4.4%	1.3%	0.0%	1.0%	3.5%	0.0%
Age Group	Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
	18 - 24	13.9%	13.1%	0.0%	15.8%	17.0%	0.0%	17.0%	12.3%	27.0%
	25 - 34	21.6%	37.2%	18.7%	27.7%	26.2%	36.8%	23.9%	35.5%	4.9%
	35 - 44	28.3%	21.7%	37.8%	26.7%	20.8%	36.1%	25.9%	20.8%	5.7%
	45 - 54	9.2%	15.4%	22.8%	8.7%	14.1%	27.2%	21.5%	19.0%	53.2%
	55+	27.0%	12.5%	20.7%	21.0%	21.9%	0.0%	11.6%	12.4%	9.2%

Inspiring new ways

JAN-MAR

2026

APPENDIX C

OVERNIGHT TRIPS BY
SOCIO-DEMOGRAPHIC INDICATORS

APPENDIX C

OVERNIGHT TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY OVERNIGHT TRIPS

		Overnight Trips		
		Q1 2024	Q1 2025	Q1 2026
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	2.2%	1.5%	0.0%
	Some primary school	5.5%	1.7%	0.6%
	Primary school completed	3.8%	0.0%	0.1%
	Some high school	24.8%	28.3%	21.6%
	High school completed	34.8%	33.1%	45.1%
	Some college	3.8%	6.0%	4.2%
	College completed	7.6%	8.7%	8.7%
	Some university	3.3%	3.6%	2.1%
	Technikon diploma / degree	4.7%	5.5%	4.5%
	University degree / diploma	6.3%	9.6%	10.6%
	Post-graduate degree	3.2%	2.0%	2.4%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	52.9%	57.7%	55.8%
	Female	47.1%	42.3%	44.2%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	57.2%	62.2%	62.9%
	Married / Living together	30.2%	27.2%	27.4%
	Divorced / Widowed / Separated	12.6%	10.6%	9.6%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	29.1%	25.7%	24.3%
	Children, dependent	55.3%	61.4%	53.1%
	Children, independent	11.0%	8.0%	13.2%
	Children, dependent + independen	4.6%	4.8%	9.5%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	4.9%	5.0%	3.8%
	R501 - R750	1.5%	0.0%	4.1%
	R751 - R1,000	5.3%	2.2%	4.4%
	R1,001 - R1,500	7.3%	6.3%	3.0%
	R1,501 - R2,000	8.2%	9.5%	8.5%
	R2,001 - R3,000	18.4%	8.9%	11.8%
	R3,001 - R5,000	10.5%	8.9%	13.5%
	R5,001 - R7,500	7.6%	8.8%	8.2%
	R7,501 - R10,000	8.4%	7.2%	7.1%
	R10,001 - R15,000	3.9%	6.6%	6.6%
	R15,001 - R20,000	4.6%	7.8%	4.7%
	R20,001 - R30,000	5.2%	5.8%	5.0%
	R30,001+	7.4%	4.2%	3.0%
	Refused to answer	4.3%	12.6%	13.6%
	Don't Know / Uncertain	0.8%	2.3%	0.0%
	No income	1.8%	3.7%	2.6%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	12.7%	13.8%	16.1%
	25 - 34	25.6%	28.1%	26.7%
	35 - 44	24.2%	24.7%	25.1%
	45 - 54	17.6%	13.3%	20.2%
	55+	19.9%	20.1%	11.8%

South Africa
Inspiring new ways

JAN-MAR

2026

APPENDIX D

DAY TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

APPENDIX D

DAY TRIPS BY SOCIO-DEMOGRAPHIC INDICATORS

SOCIO-DEMOGRAPHICS, BY DAY TRIPS

		Day Trips		
		Q1 2024	Q1 2025	Q1 2026
Highest Level of Education	Total	100.0%	100.0%	100.0%
	No school	2.2%	1.7%	1.6%
	Some primary school	5.5%	4.1%	1.4%
	Primary school completed	3.8%	4.5%	1.4%
	Some high school	24.8%	28.0%	23.1%
	High school completed	34.8%	36.8%	45.8%
	Some college	3.8%	5.8%	4.6%
	College completed	7.6%	8.5%	6.7%
	Some university	3.3%	2.4%	1.8%
	Technikon diploma / degree	4.7%	2.6%	5.0%
	University degree / diploma	6.3%	4.9%	6.4%
	Post-graduate degree	3.2%	0.7%	2.0%
	Refused / Unknown	0.0%	0.0%	0.0%
Gender	Total	100.0%	100.0%	100.0%
	Male	52.9%	52.8%	63.2%
	Female	47.1%	47.2%	36.8%
Marital Status	Total	100.0%	100.0%	100.0%
	Single / Never married	57.2%	61.0%	61.0%
	Married / Living together	30.2%	24.3%	30.0%
	Divorced / Widowed / Separated	12.6%	14.7%	8.9%
	Refused	0.0%	0.0%	0.0%
Family Situation	Total	100.0%	100.0%	100.0%
	No children	29.1%	27.4%	31.2%
	Children, dependent	55.3%	53.1%	52.0%
	Children, independent	11.0%	13.7%	10.4%
	Children, dependent + independer	4.6%	5.8%	6.3%
	Refused	0.0%	0.0%	0.0%
Personal Monthly Income	Total	100.0%	100.0%	100.0%
	R1 - R500	4.9%	8.9%	7.2%
	R501 - R750	1.5%	3.9%	5.5%
	R751 - R1,000	5.3%	3.8%	4.4%
	R1,001 - R1,500	7.3%	6.2%	8.1%
	R1,501 - R2,000	8.2%	6.4%	7.2%
	R2,001 - R3,000	18.4%	14.4%	10.7%
	R3,001 - R5,000	10.5%	12.5%	9.9%
	R5,001 - R7,500	7.6%	9.3%	8.0%
	R7,501 - R10,000	8.4%	5.9%	6.4%
	R10,001 - R15,000	3.9%	5.3%	6.3%
	R15,001 - R20,000	4.6%	2.9%	2.7%
	R20,001 - R30,000	5.2%	2.6%	3.0%
	R30,001+	7.4%	2.0%	4.2%
	Refused to answer	4.3%	11.8%	11.5%
	Don't Know / Uncertain	0.8%	1.1%	0.9%
	No income	1.8%	3.1%	3.9%
Age Group	Total	100.0%	100.0%	100.0%
	18 - 24	12.7%	17.9%	19.1%
	25 - 34	25.6%	28.1%	28.6%
	35 - 44	24.2%	21.6%	25.4%
	45 - 54	17.6%	17.4%	12.3%
	55+	19.9%	15.1%	14.5%

South Africa

Inspiring new ways

JAN-MAR

2026

APPENDIX E

SHARE OF TRANSPORT USED TO TRAVEL TO DESTINATION

APPENDIX E

SHARE OF TRANSPORT USED TO TRAVEL TO DESTINATION

SHARE OF TRANSPORT TYPE

		Share of Transport Type		
		Q1 2024	Q1 2025	Q1 2026
Main Transport to Destination	Minibus taxi	35.5%	39.5%	40.9%
	My car / van / bakkie	31.2%	33.7%	25.8%
	Another car / van / bakkie	20.9%	20.1%	22.7%
	Aeroplane	1.9%	2.9%	4.1%
	Rental car	1.3%	0.6%	2.7%
	Tour bus	2.2%	2.9%	2.2%
	Commercial bus	5.3%	1.1%	0.7%
	App-based taxi (Uber, Bolt, etc.)	1.0%	0.6%	0.6%
	Truck / lorry	0.3%	0.3%	0.3%

South Africa
Inspiring new ways

JAN-MAR
2026

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		
		Q1 2024	Q1 2025	Q1 2026
Accommodation Type	Friends / Relatives	65.5%	71.4%	71.7%
	Hotel	1.0%	3.5%	7.1%
	B&B	6.7%	3.2%	5.0%
	Holiday Home	0.1%	0.0%	4.1%
	Guest House	7.6%	6.6%	3.6%
	Self-Catering	7.6%	7.4%	3.5%
	Lodge	0.2%	1.5%	1.8%
	Halls	2.1%	4.4%	1.4%
	Camping	1.0%	0.1%	0.8%
	Other Accommodation	0.9%	0.0%	0.6%
	AirBnB	5.9%	0.4%	0.5%
	Hospital	1.4%	1.5%	0.0%
	Hostel	0.1%	0.1%	0.0%

CONTACT

Technical Enquiries: Refilwe Molatlhegi

Tel: +27 11 8953153

Email: refilwe@southafrica.net

PRODUCED BY SOUTH AFRICAN TOURISM

South Africa

Inspiring new ways