



Western Cape's Annual Tourism Performance

January–December 2025

Glossary

- **South African resident** refers to either a South African citizen or a non-South African citizen with a South African permanent residence permit.
- **Overseas:** Europe, North America, Central and South America, Australasia, the Middle East and Asia.
 - **Overseas** refers to all countries outside Africa.
- **Africa:** Southern African Development Community (SADC) and 'other' Africa (east and central Africa, west Africa and north Africa).
 - **Africa** refers to all the countries in Africa (both mainland and island countries, excluding South Africa).
- **TFDS** – Total foreign direct spend
- **SA** – South Africa
- **WC** – Western Cape
- **MICE** – Meetings, incentives, conferences and exhibitions
- **VFR** – Visiting friends and relatives

Definitions

Visitor – Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for travel is other than the exercise of an activity to be remunerated at the place visited.

Same day visitor – Any person who visits a place without staying the night.

Tourist – A visitor who stays at least one night in the place visited.

International tourist – An international visitor who stays at least one night in collective or private accommodation in the country that was visited.

Overnight trip – A journey undertaken by one or more members of the household for at least one night away from home, where the person travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.

Methodology

The tourism data represented in this report is based on findings obtained from South African Tourism's Analytics and Insights Unit and is derived from South African Tourism's Departure Survey.

The survey has been used by South African Tourism since 2001 to monitor and measure international tourism behaviour when tourists depart from the country.


The survey aims to track tourists' travel behaviour, expenditure, accommodation usage, experiences and how satisfied they are with South Africa as a holiday and business destination.

The survey is conducted monthly and covers South Africa's two main international airports (Oliver Tambo and Cape Town), as well as the 12 border posts on the mainland.

Source: Adopted from South African Tourism (SAT), 2026

Executive Summary

- Momentum strengthened in the Western Cape during 2025, with tourist arrivals reaching 1.5 million, reflecting a +11.1% year-on-year increase. The province's top 10 source markets accounted for 73.0% of total arrivals, reinforced largely by long-haul demand. The UK, accounting for 14.3% of arrivals, and Germany for 10.9%, remained the dominant overseas contributors, while Zimbabwe (7.1%) continued to represent the largest African source market.
- Travelling for holidays accounted for a 53.2% share of arrivals and ranked as the top reason for travel to the Western Cape in 2025. This represented an increase of 1.7% year-on-year. Visiting friends and relatives (VFR) accounted for 27.1% of arrivals, up 1.3% against 2024 and 10.4% above 2019, signalling a higher friends and relatives' segment when compared to pre-pandemic levels. Visiting for meetings, incentives, conferences and exhibitions (MICE) accounted for 7.6% of arrivals, while the business traveller component recorded a 5.8% share of arrivals.
- When it came to spending, the Western Cape performed impressively and was responsible for the second-highest share (25.4%) of South Africa's total foreign direct spend (TFDS) in 2025. The province attracted a remarkable R25.9 billion in TFDS, with R21.7 billion sourced from overseas travellers and R4.2 billion from African markets.
- Visitors continued to enjoy longer stays, with total bed nights (from overseas and African markets, excluding SA residents) reaching 18.7 million in 2025, up by 9.5% year-on-year. On average, guests spent 12.5 nights exploring the province.
- Domestic tourism also enjoyed positive momentum. In 2025, the Western Cape welcomed 4.0 million domestic trips, reflecting a 15.4% increase compared to the previous year. Domestic bed nights rose by 10.2%, reaching 14.3 million in 2025, with an average stay of 3.6 nights in the province.
- In 2025, the province recorded R12.7 billion in overnight domestic spend. Most domestic visitors travelled to the Western Cape for holiday purposes (1.6 million trips) in 2025, followed closely by those visiting friends and relatives (1.5 million trips), and 128,459 visitors who travelled for religious purposes.



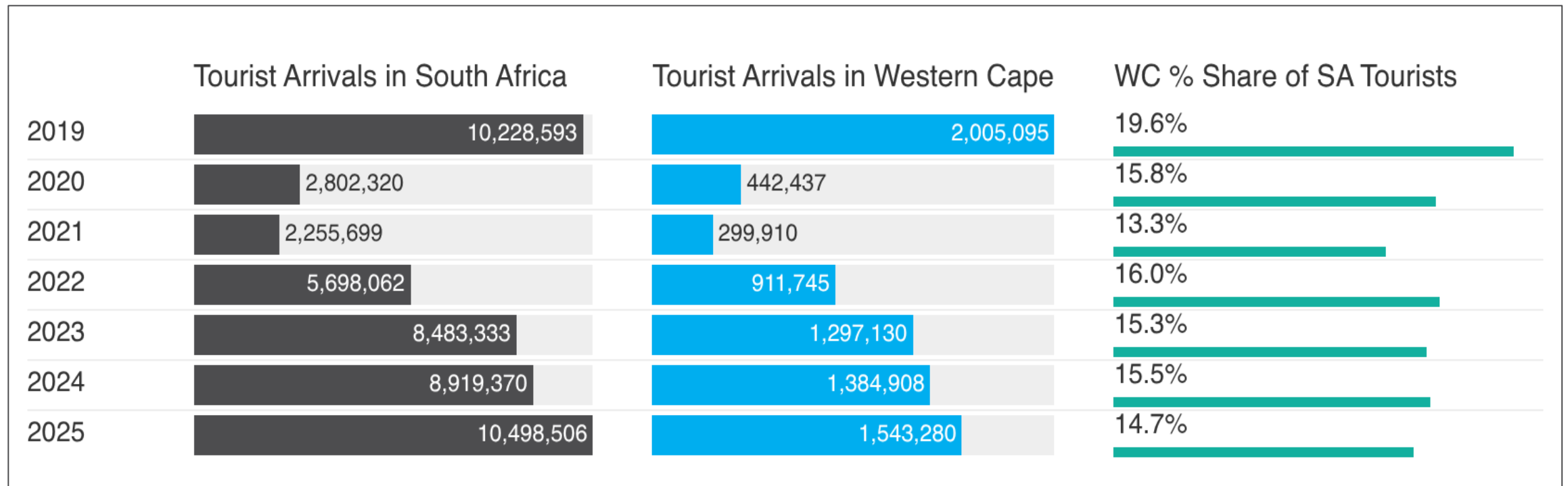
International Tourism Performance: Annual 2025 (Jan–Dec)

International Tourism Highlights: January–December 2025

South Africa	Western Cape
Total Tourist Arrivals (Overseas + Africa)	
Jan–Dec 2025: 10 498 506 (+17.7% increase compared to 2024)	Jan–Dec 2025: 1 538 142 (+11.1% increase compared to Jan–Dec 2024)
Total Foreign Direct Spend	
Jan–Dec 2025: R102.2 billion (+11.6% increase compared to Jan–Dec 2024)	Jan–Dec 2025: R25.9 billion (+14.4% increase compared to Jan–Dec 2024)
Total Bed Nights	
Jan–Dec 2025: 151.4 million (+32.1% increase compared to Jan–Dec 2024)	Jan–Dec 2025: 18.7 million (+9.5% increase compared to Jan–Dec 2024)
Average Length of Stay	
Jan–Dec 2025: 14.8 nights (+11.7% increase compared to 2024)	Jan–Dec 2025: 12.5 nights (-1.5% decrease compared to 2024)

Western Cape's Tourism Performance: International Tourist Arrivals

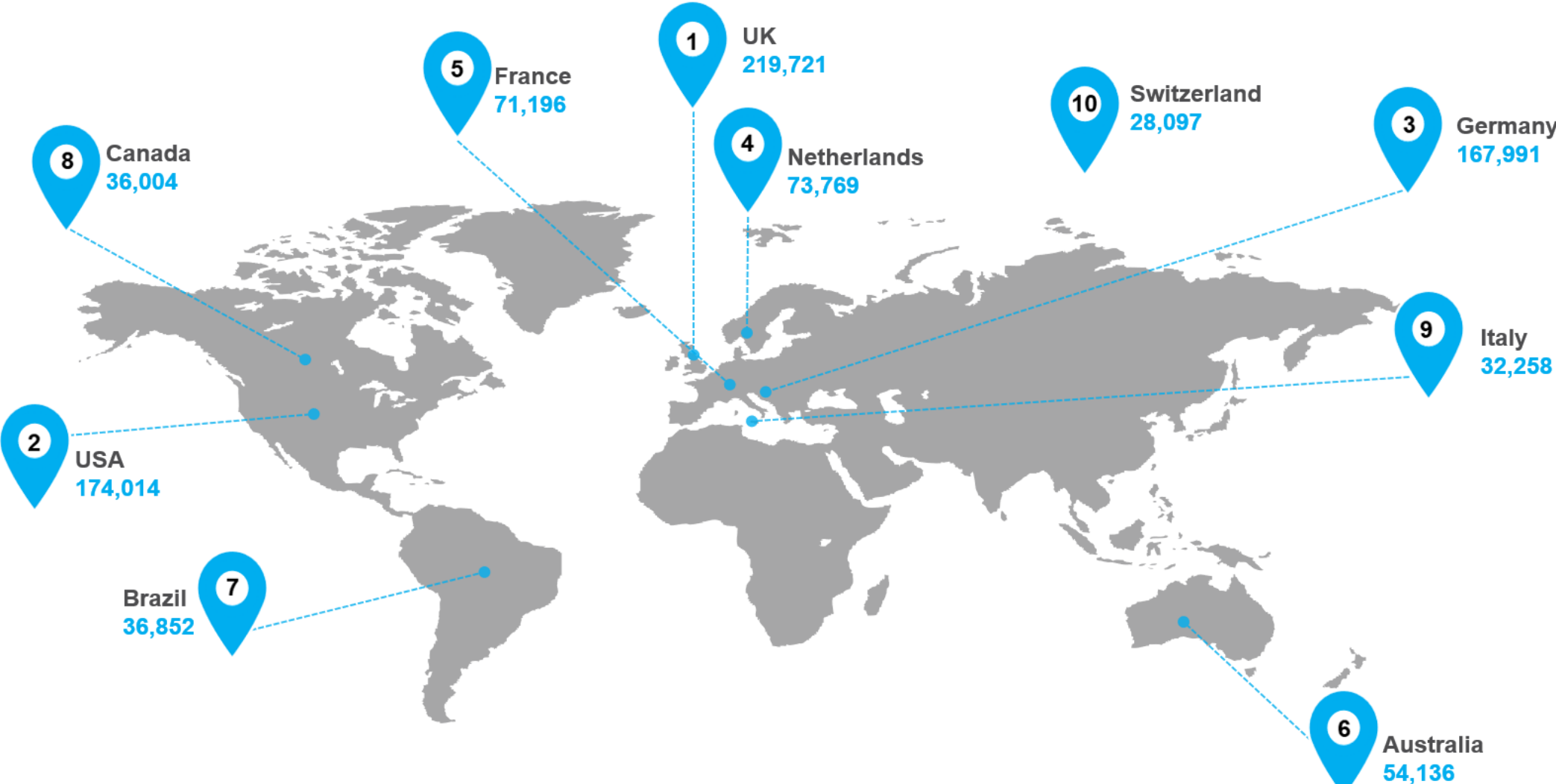
The Western Cape accounted for a **14.7% share** of South Africa's tourist arrivals in 2025, which amounted to **1.5 million international tourist arrivals**, equivalent to a year-on-year increase of **+11.1%**.













*Note: SA – South Africa, WC – Western Cape

Source: SA Tourism, 2026

The UK, USA and Germany ranked as the Western Cape's top three source markets in 2025



The WC's top 10 international source markets collectively accounted for a TFDS of **R16.8 billion** in 2025, amounting to 65% of WC's TFDS.

Top 10 WC Markets	Tourist Arrivals 2019	Tourist Arrivals 2024	Tourist Arrivals 2025	24/25 % Change	Total Foreign Direct Spend in 2025	Average Spend in 2025
 UK	301,321	189,848	219,721	15.7%	R4,836mn	R22.900
 USA	239,989	163,303	174,014	6.6%	R2,749mn	R16.600
 Germany	232,353	145,329	167,991	15.6%	R3,320mn	R20.500
 Netherlands	90,431	68,716	73,769	7.4%	R1,332mn	R18.700
 France	108,485	69,715	71,196	2.1%	R1,283mn	R18.900
 Australia	67,571	44,693	54,136	21.1%	R968mn	R18.600
 Brazil	36,350	29,401	36,852	25.3%	R585mn	R16.400
 Canada	45,656	32,575	36,004	10.5%	R569mn	R16.700
 Italy	46,784	31,610	32,258	2.0%	R520mn	R16.800
 Switzerland	40,323	27,415	28,097	2.5%	R611mn	R22.700

*TFDS – Total Foreign Direct Spend

*WC – Western Cape

Source: SA Tourism, 2026

Western Cape's Tourism Performance: Africa (Jan–Dec 2025)



African tourists in the Western Cape
375,706 (+11.2% YoY increase)

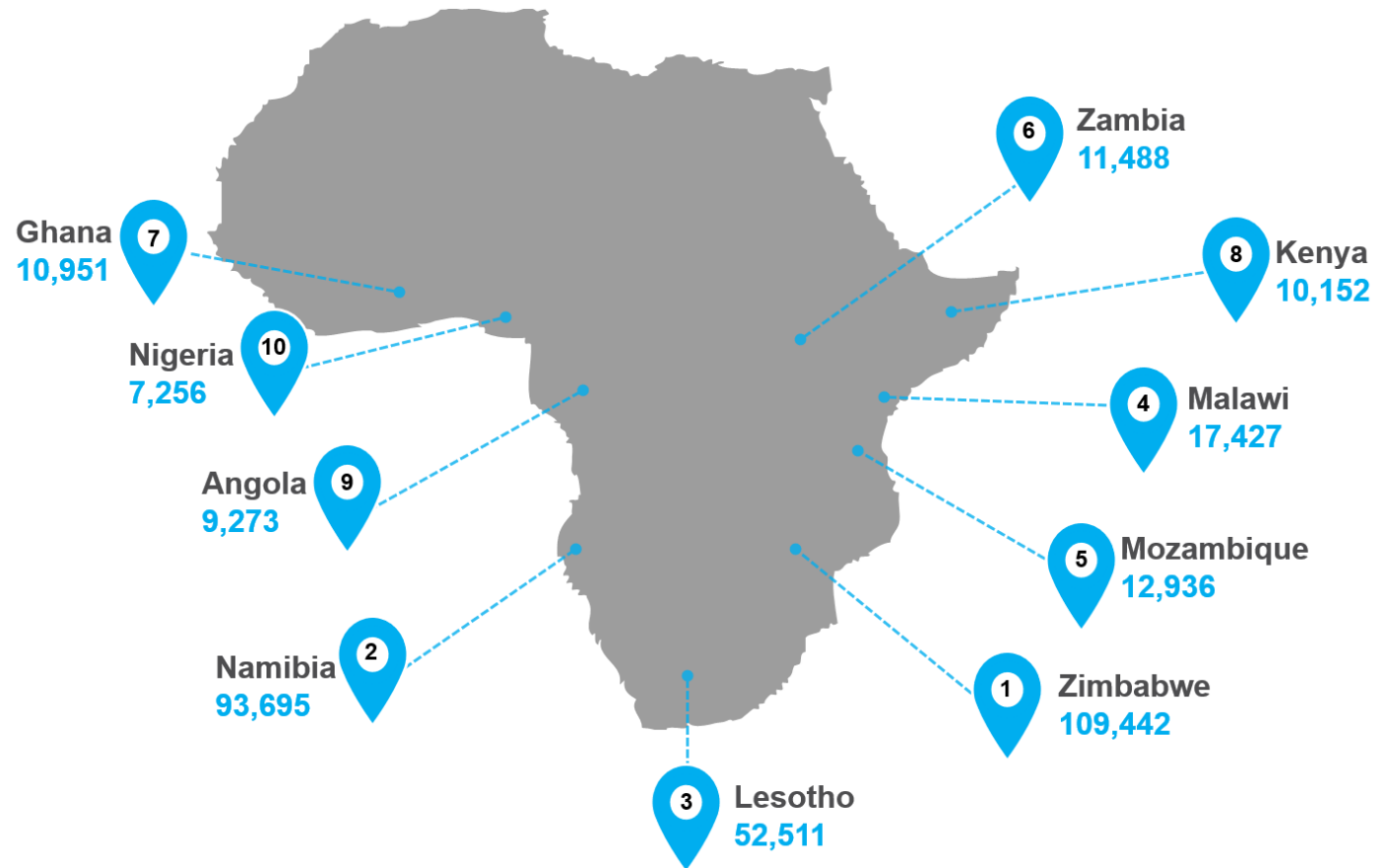


TFDS from **Africa** in the Western Cape
R4.2 billion



Average spend from **Africa** in the Western Cape
R11,800

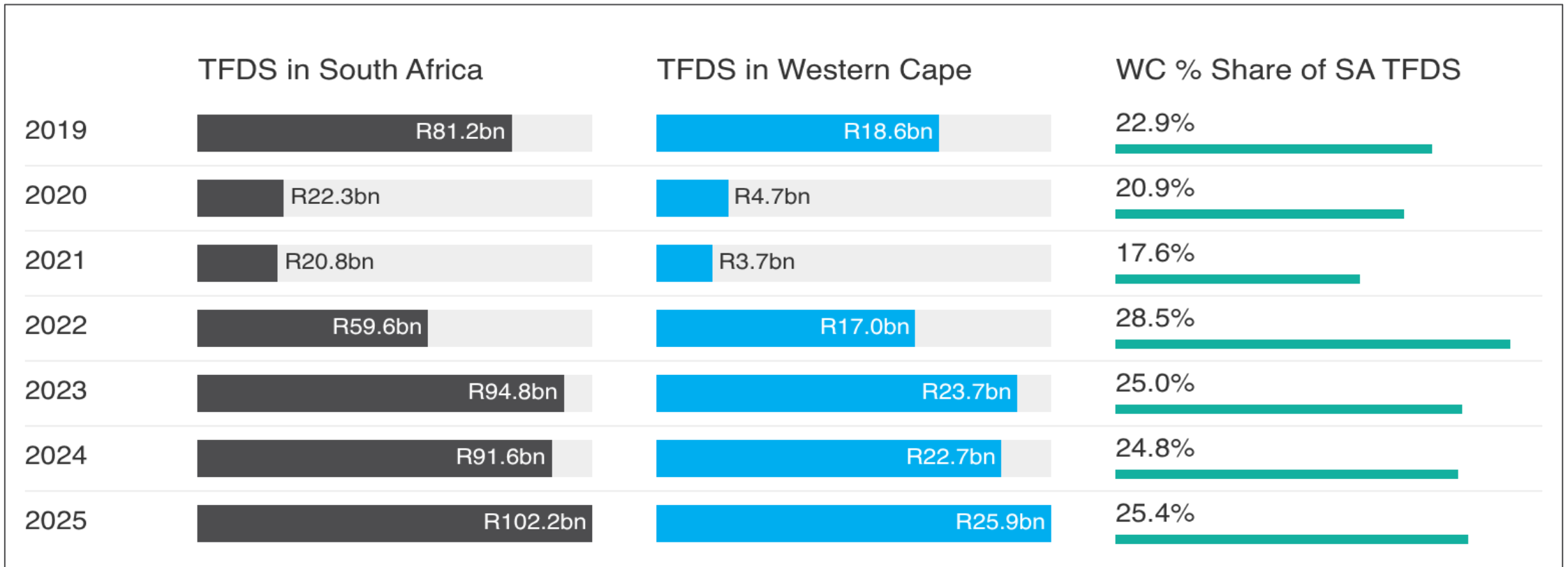
Top Markets for Tourist Arrivals in the WC from Africa (2025)



Source: South African Tourism (2026); cited by Wesgro (2026)

Western Cape's Tourism Performance: Total Foreign Direct Spend

The Western Cape held a **25.4% share** of South Africa's TFDS from international tourists in 2025, which amounted to **R25.9 billion**, an increase of **14.4%** in relation to 2024.



*TFDS – Total Foreign Direct Spend

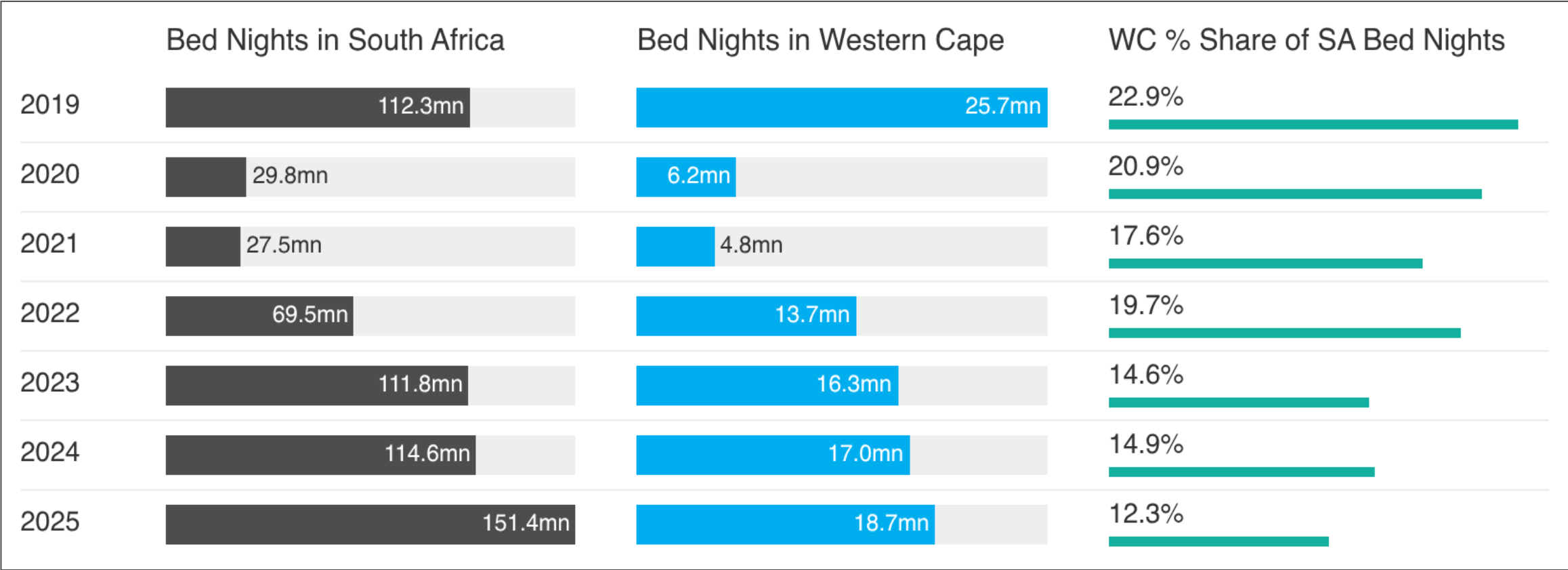
*SA – South Africa

*WC – Western Cape

Source: SA Tourism, 2026

Western Cape's Tourism Performance: Bed Nights

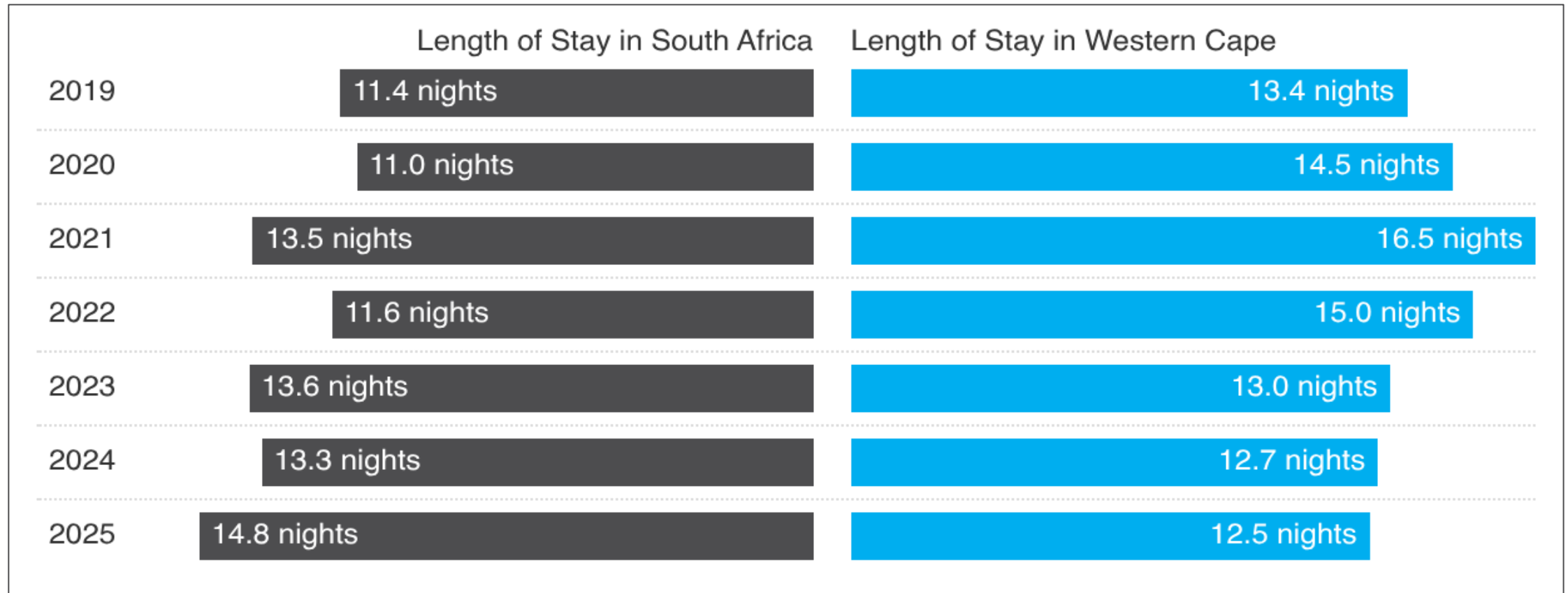
The Western Cape held a **12.3% share** of South Africa's bed nights from international tourists in 2025, which amounted to **18.7 million** bed nights, equivalent to an increase of **+9.5%** in relation to 2024.



Source: SA Tourism, 2026

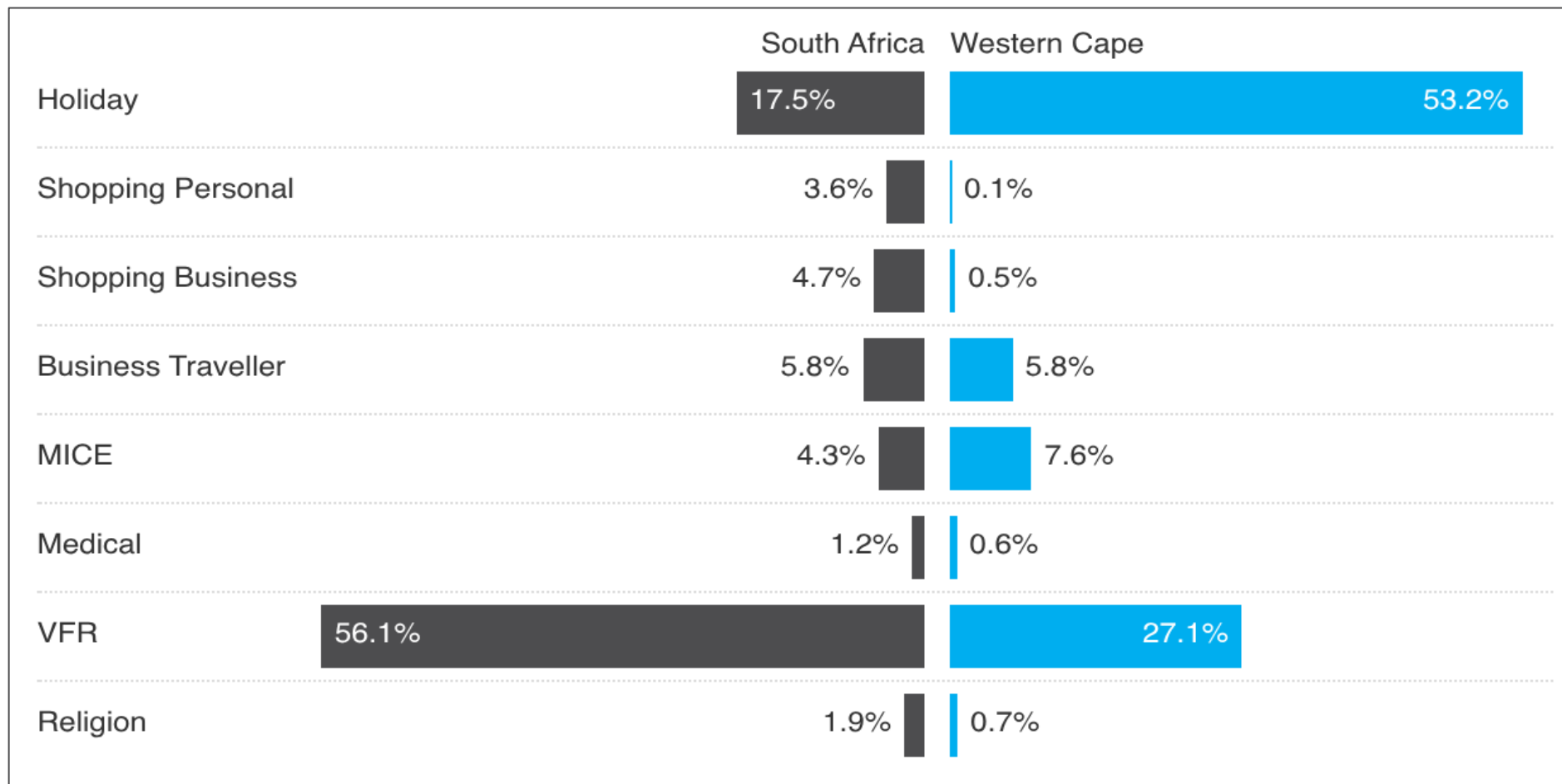
Western Cape's Tourism Performance: Length of Stay

Overnight stays from international tourists in the Western Cape translated to an average length of stay of **12.5 nights** in 2025, while nationally, overnight stays averaged at **14.8 nights** in the same year.



Source: SA Tourism, 2026

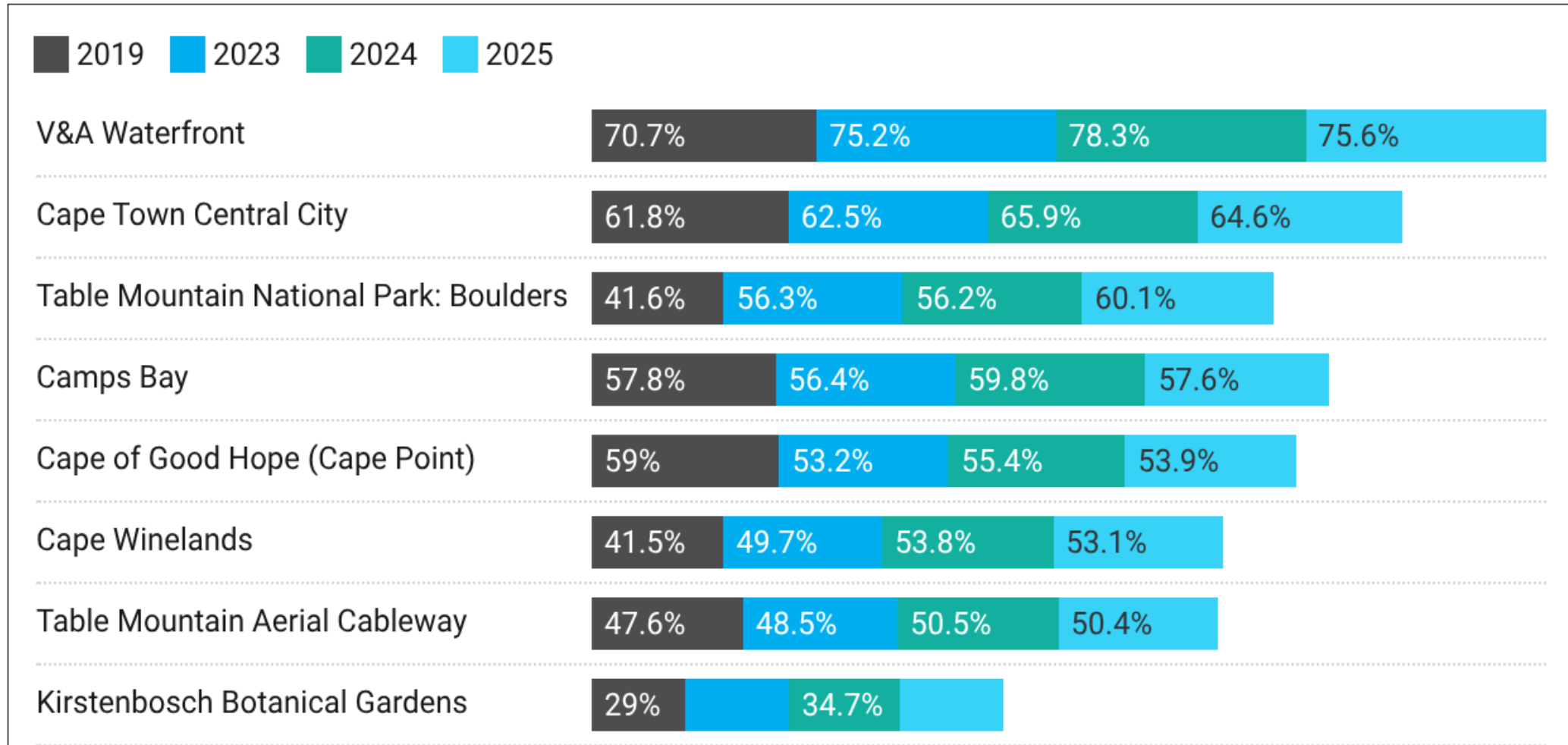
More than **50%** of international tourists visiting the Western Cape travelled for **holiday purposes** in 2025, while **56%** of international tourists visited friends and relatives (VFR) in South Africa during the same year.




*VFR – Visiting Friends and Relatives.

*MICE – Meetings, Incentives, Conferences & Exhibitions

The V&A Waterfront, Cape Town Central City and Table Mountain National Park: Boulders ranked as the top three most visited attractions for international tourists in the Western Cape in 2025.





Domestic Tourism Performance: Annual 2025 (Jan–Dec)

Objectives of SAT's Domestic Tourism Survey (DTS)

The Domestic Tourism Survey (DTS) is a large-scale household survey designed to collect accurate statistics on the travel behaviour and expenditure of South African residents travelling within the country's borders.

Since 2007, South African Tourism has commissioned a monthly household survey of South African residents aged 18 and older to measure key indicators relating to domestic tourism.

The following key indicators are measured:

- **Volume:** the incidence of domestic travel and how many trips are taken
- **Value:** how much is spent by domestic tourists
- **Number of bed nights:** The number of nights spent in various establishments
- **Provincial distribution:** How the volume, value, and bed nights are distributed between the nine provinces
- **Seasonality:** When do people travel
- The survey is designed to cover three categories of residents, namely: a) non-travellers in the past 12 months; b) travellers in the past 12 months; and c) travellers in the past month

The purpose of the DTS is to measure the value and the volume of domestic tourism in South Africa and to understand domestic travel behaviour. The key objectives of the survey are to:

- Determine the incidence of travel among 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 the reasons for choosing that particular province

Source: Adopted from SA Tourism, 2026

SAT Domestic Tourism Statistics: Methodology

Data for the DTS is collected using a structured questionnaire that is administered through a face-to-face interview in the respondent's home.

The sampling frame is generated from a top-down and bottom-up approach. The top-down approach utilises the Stats SA 2011 Census information and latest mid-year estimate data, and the bottom-up approach uses the GTI national Building Census (Structure/dwelling unit type) dataset.

The sample was designed in accordance with previous DTSs and a sample frame which was:

- A multi-stage, stratified probability sample, representative of all SA adults aged 18 years and older.
- Stratified by province, race, geographic areas (metro, urban, and rural), EA (enumerator areas) type, main place, and sub-place.

The sample was drawn using a stratified multistage probability sample based on three random selection elements: (i) enumerator areas (EAs) as primary sampling units (PSUs), (ii) dwellings/households as the secondary sampling units (SSUs) and (iii) adult household members 18+ years as ultimate sampling units (SSUs).

In each EA 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.

The sample consists of 1,300 persons aged 18 years and above, per month.

The monthly sample is re-weighted to the SA population aged 18 years and older. Sample weighting is achieved using the latest mid-year estimates from Stats SA and by the use of various weighting techniques.

Source: Adopted from SA Tourism, 2026

SAT's Key Definitions

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

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 the purpose of relocation and remuneration.

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.

Bed Nights – The total number of nights spent in accommodation establishments by domestic tourists.

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

Main Purpose of the Trip – This is the purpose in the absence of which the trip would not have been taken.

Source: Adopted from SA Tourism, 2026

Domestic Tourism Highlights: Jan–Dec 2025

South Africa		Western Cape	
Domestic Overnight Trips			
44.7 million (+11.1% increase compared to 2024)		4.0 million (+15.4% increase compared to 2024)	
Domestic Overnight Spend			
R111.6 billion (-18.2% decrease compared to 2024)		R12.7 billion (-31.9% decrease compared to 2024)	
Average Domestic Overnight Spend			
R2 498 (-26.4% decrease compared to 2024)		R3 172 (-40.9% decrease compared to 2024)	
Bed Nights			
171.0 million (+10.3% increase compared to 2024)		14.3 million (+10.2% increase compared to 2024)	
Length of Stay			
3.8 nights (-0.7% decrease compared to 2024)		3.6 nights (-4.4% decrease compared to 2024)	
Main Purpose of Visit			
Visiting Friends and Relatives (VFR)	24.1 million overnight trips (+48.0% increase compared to 2024)	Holiday	1.6 million overnight trips (+3.5% increase compared to 2024)

Western Cape's Tourism Performance: Domestic Overnight Trips

The Western Cape accounted for an **8.9% share** of South Africa's total domestic trips in 2025 (Jan–Dec), which amounted to approximately **4.0 million domestic overnight trips**, an increase of **+15.4%** compared to 2024.

	Domestic Overnight Trips in South Africa	Domestic Overnight Trips to Western Cape	Western Cape % Share	YoY % Change
2019	28,456,033	3,970,874	14.0%	248.9%
2020	17,037,577	2,156,442	12.7%	-45.7%
2021	14,836,807	885,583	6.0%	-58.9%
2022	34,028,713	3,113,821	9.2%	251.6%
2023	37,886,187	3,300,246	8.7%	6.0%
2024	40,194,837	3,458,204	8.6%	4.8%
2025	44,667,787	3,989,737	8.9%	15.4%

Western Cape's Tourism Performance: Domestic Overnight Spend

The Western Cape accounted for an **11.3% share** of South Africa's total domestic overnight spend in 2025 (Jan–Dec), equivalent to over **R12.7 billion**.

	Overnight Spend in South Africa	Overnight Spend in Western Cape	Western Cape % Share	YoY % Change
2019	R43.9bn	R7.7bn	17.6%	315.4%
2020	R53.1bn	R6.9bn	12.9%	-11.2%
2021	R45.4bn	R6.8bn	15.0%	-0.7%
2022	R99.2bn	R13.0bn	13.1%	90.2%
2023	R121.4bn	R14.8bn	12.2%	14.4%
2024	R136.4bn	R18.6bn	13.6%	25.1%
2025	R111.6bn	R12.7bn	11.3%	-31.9%

Western Cape's Tourism Performance: Domestic Average Spend

The Western Cape recorded the highest average spend per domestic overnight trip in the country at **R3,172** in 2025 (Jan–Dec), but this represented a **decrease of -40.9%** compared to 2024.

	Domestic Average Spend in South Africa	Domestic Average Spend in Western Cape	YoY % Change
2019	R1,542	R1,744	-
2020	R3,118	R2,599	49.0%
2021	R3,062	R7,704	196.4%
2022	R2,914	R4,167	-45.9%
2023	R3,203	R4,499	8.0%
2024	R3,394	R5,371	19.4%
2025	R2,498	R3,172	-40.9%

Western Cape's Tourism Performance: Bed Nights

The Western Cape held an **8.4% share** of South Africa's total domestic bed nights in 2025 (Jan–Dec), which amounted to **14.3 million** bed nights, equivalent to a **growth of +10.2%** in relation to 2024.

	Bed Nights in South Africa	Bed Nights in Western Cape	Western Cape % Share	YoY % Change
2019	94.5m	16.6m	17.6%	240.8%
2020	56.8m	6.0m	10.5%	-64.0%
2021	51.2m	3.1m	6.2%	-47.4%
2022	118.6m	11.0m	9.3%	249.8%
2023	133.0m	12.4m	9.4%	13.0%
2024	155.0m	13.0m	8.4%	4.6%
2025	171.0m	14.3m	8.4%	10.2%

Western Cape's Tourism Performance: Average Length of Stay

Overnight domestic trips to the **Western Cape** translated to an average length of stay of **3.6 nights** in 2025 (Jan–Dec).

	Average Length of Stay in South Africa	Average Length of Stay in Western Cape	YoY % Change
2019	2.8 nights	3.8 nights	-0.9%
2020	3.7 nights	2.7 nights	-28.8%
2021	3.4 nights	3.8 nights	41.5%
2022	3.5 nights	3.3 nights	-12.1%
2023	3.5 nights	3.8 nights	13.4%
2024	3.9 nights	3.8 nights	-0.2%
2025	3.8 nights	3.6 nights	-4.4%

Source: SA Tourism Data Cuts (2026)

Western Cape's Tourism Performance: Overnight Purpose of Visit

The top two contributors to overnight trips in the Western Cape in 2025 were **holidays**, with **1.6 million trips**, followed by **VFR**, which amounted to over **1.5 million visits**.

	2022	2023	2024	2025	YoY % Change
Holiday	1,408,981	2,023,559	1,585,493	1,640,611	3.5%
VFR	1,483,959	879,094	1,396,920	1,505,415	7.8%
Religious	75,951	33,487	76,486	128,459	68.0%
MICE	15,551	127,150	98,815	51,042	-48.3%
Medical	-	0	101,214	30,384	-70.0%
Education/training	27,686	6,197	9,097	-	-

*VFR – Visiting friends and relatives

Source: SA Tourism Data Cuts (2026)



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