



Cape Town Tourism Visitor Trends January to December 2023

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1. Executive Summary

- The attractions included in the report are participating attractions which supply Wesgro with data. These include Table Mountain National Park, Table Mountain Aerial Cableway, Table Mountain National Park: Cape of Good Hope, Table Mountain National Park: Boulders, Kirstenbosch National Botanical Garden and Robben Island. Collectively, the attractions welcomed 6.4 million visitors between January and December 2023. This reflects an increased growth of 46.2% in visitation compared to the same period in 2023 (Jan–Dec).

Rove Mobile Location Data between January and December 2023 was used to gain insights into the travel behaviour of domestic and international tourists visiting Cape Town. The following findings were observed:

➤ Domestic tourists:

- The mobile location data provided insights into the travel patterns of 317,625 domestic tourists who visited Cape Town. It was found that most tourists who visited Cape Town were from Johannesburg, Tshwane, and Ekurhuleni.
- The average length of stay for domestic tourists in Cape Town was 3.1 days, with 45.1% being repeat visitors. Additionally, 34.5% of domestic tourists stayed for just one day and in the months of March and June, the average stay peaked at 3.5 and 4.1 days, respectively.
- Nearly 70% of domestic tourists preferred overnight stays in Cape Town and most overnight visits occurred in January, March, and June, with Friday being the popular arrival and departure day.

➤ International tourists:

- The mobile location data offered valuable insights into the travel patterns of 15,692 international tourists who explored the beauty of Cape Town. Among them, numerous visitors originated from the United States, the United Kingdom, and Australia.
- The average length of stay for international tourists was 3.0 days, with 34.2% being repeat tourists. Additionally, 31.5% of international tourists only stayed for one day, with average stays of 3.4 days in March and 3.6 days in June.
- In Cape Town, over 60% of international tourists stayed overnight, with January to June being the most popular months for overnight stays. Similarly to the domestic market, Friday was the popular day for arrival and departure amongst international tourists.

2. Cape Town Mobile Location Data Insights: Methodology

What is mobile location data?

- This is Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they opt in, then their phone collects data and shares it with the publisher companies.
- All data collected is anonymised and does not include any personally identifiable information.

Why use mobile location data insights?

- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six regions.
- Mobile location data serves as a sample. It does not represent 100% of visitors, and it should not be treated as such. Like any sampling method, it can be subject to biases or lack of volume.

Factors influencing the International and Domestic Sample Counts:

The volume of mobile location data capture counts is influenced by several factors including but not limited to:

Data Source Variability

- Changing volume of mobile applications collecting and sharing data
- Data privacy and regulatory changes affecting sharing of data (GDPR, mobile OS policy changes etc.)

Data Collection and Processing Variability

- Mobile network and internet connectivity
- Mobile infrastructure technical issues (hardware failures, solar flare activity)
- Tourist logic to segment tourist from non-tourist mobile devices

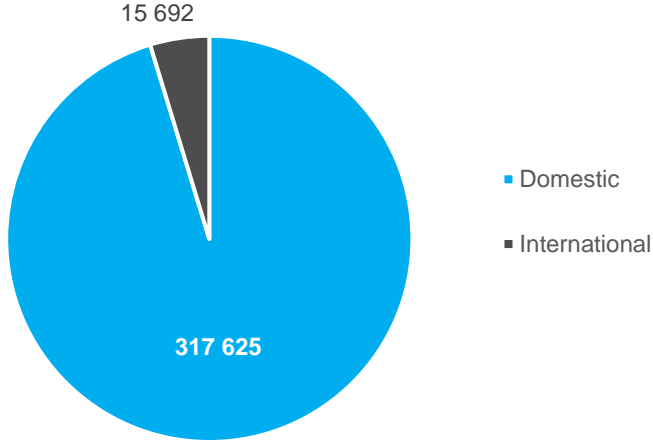
Mobile Use Variability

- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

While all mobile devices are affected by above, International mobile device counts are affected more than Domestic mobile devices when it comes to both mobile use fluctuations and data privacy restrictions. Tourists use their phones differently when travelling internationally – they may want to avoid additional out of country fees and only use their phone through wi-fi service. Tourists may not use the partnership apps they normally do while on extensive holiday. Restricting data privacy laws are also affecting the international landscape affecting data that can be shared which may affect processing that identifies tourists.

3. Cape Town Visitor Trends: Origin of Visitors

Figure 1: Cape Town Sample size, Jan–Dec 2023



- The insights in this report represent the mobile location data from a sample of **317,625 domestic** and **15,692 international** tourists who visited Cape Town between January and December 2023.
- Within the domestic data set, **53,106** were from Johannesburg, **31,034** from Tshwane and **24,494** from Ekurhuleni. Amongst the international tourists in the sample, **3,602** were from the United States, **1,519** from the United Kingdom, and **1,310** from Australia. This can be seen in Figures 2 and 3.

Figure 2: Municipalities of origin for domestic tourists to Cape Town, Jan–Dec 2023

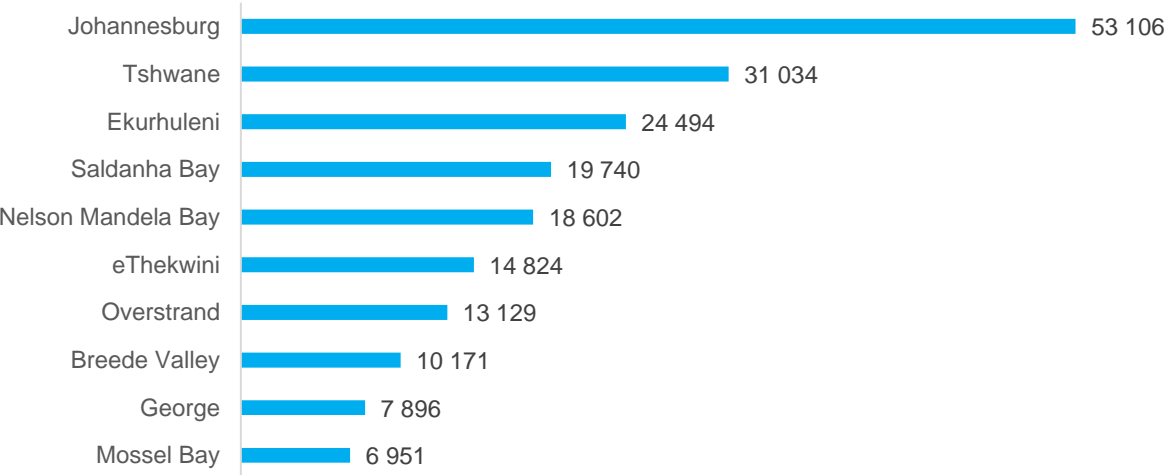
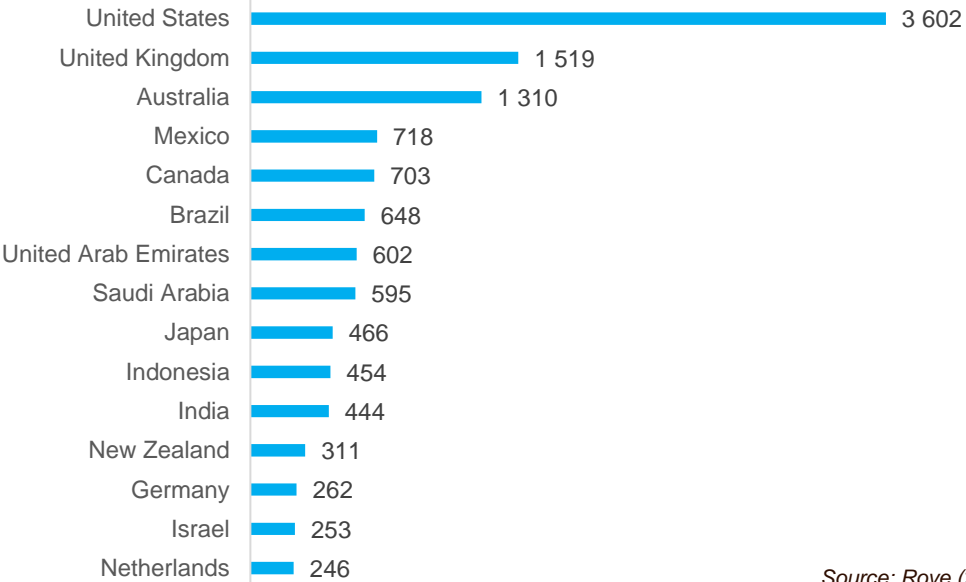
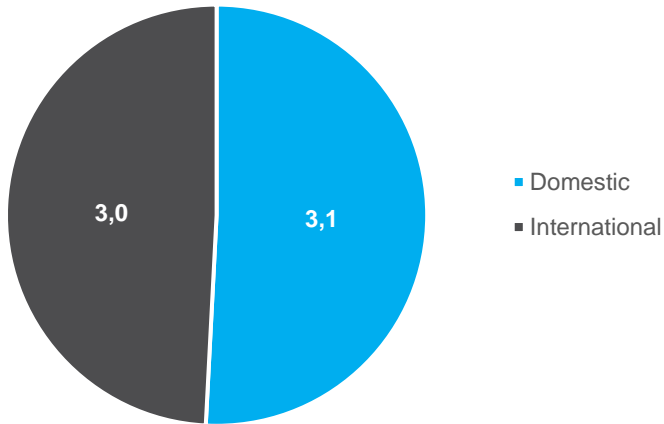


Figure 3: Top 15 Countries for international tourists to Cape Town, Jan–Dec 2023



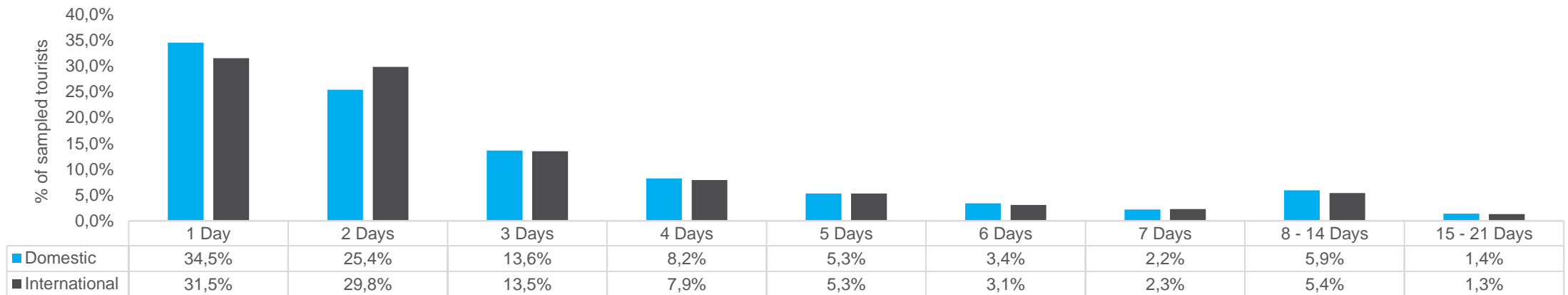
4. Cape Town Visitor Trends: Average Length of Stay

Figure 4: Average length of stay (LOS), Jan–Dec 2023



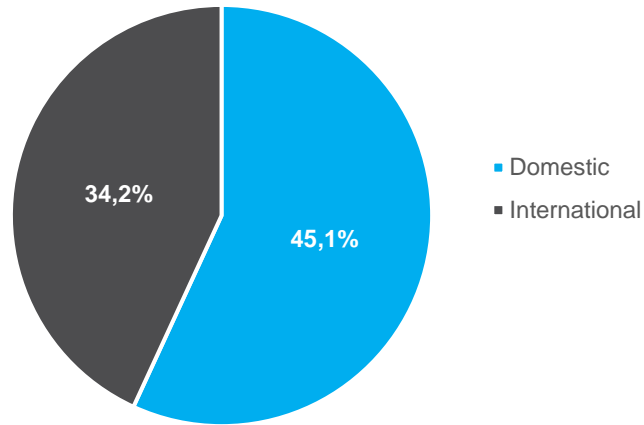
- On average, domestic and international tourists spent around 3.1 and 3.0 days in Cape Town, respectively. This information is based on the data analysed for the period between January and December 2023 and highlights the average length of stay of tourists to Cape Town, reflected in Figure 4.
- Findings also indicated that 34.5% of domestic tourists and 31.5% of international tourists were day visitors to Cape Town (Figure 5).

Figure 5: Average length of stay (Number of days) in Cape Town, Jan–Dec 2023



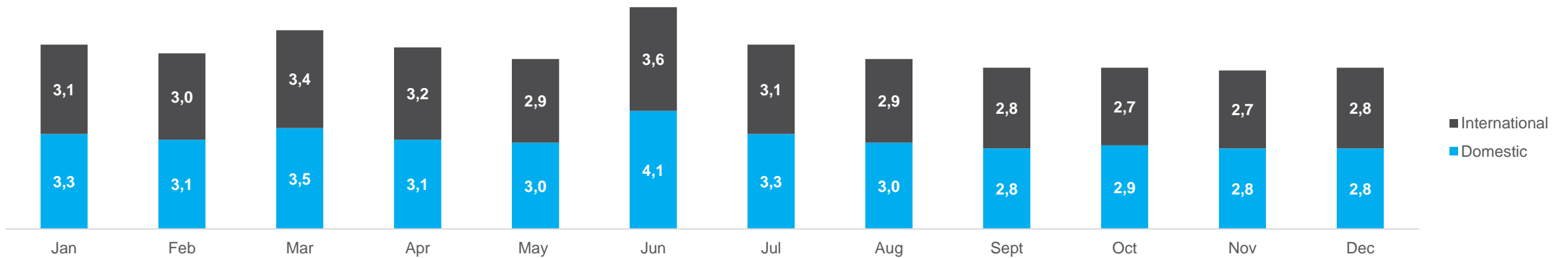
5. Average Length of Stay and Repeat Visits

Figure 6: Repeat visits to Cape Town, Jan–Dec 2023



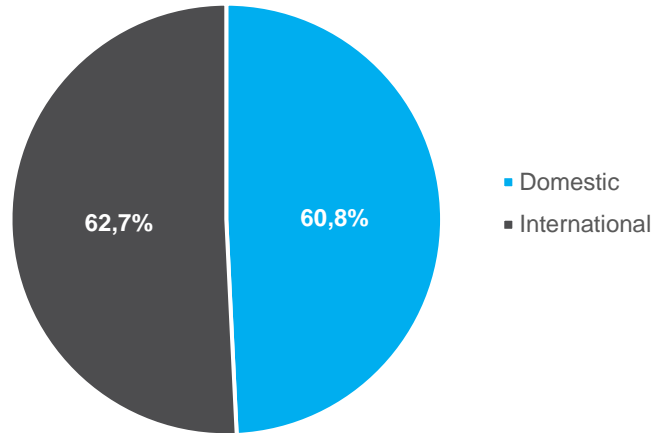
- Trends further showed that 45.1% of domestic tourists and 34.2% of international tourists were repeat visits to Cape Town, as reflected in Figure 6.
- This indicates that Cape Town is a popular destination among tourists, who often choose to return for subsequent visits.
- Average length of stay trends by month revealed that June ranked as the most prevalent month for longer stays amongst both the international and domestic tourists.

Figure 7: Average length of stay in Cape Town by month, Jan–Dec 2023



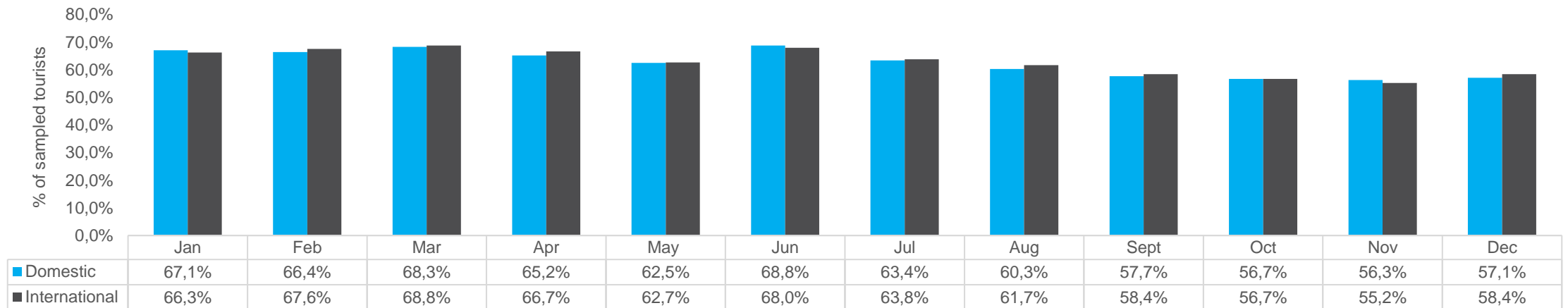
6. Cape Town Visitor Trends: Overnight Stays

Figure 8: Overnight stay in Cape Town, Jan–Dec 2023



- Between January and December 2023, more than 60% of sampled international tourists indicated overnight stays in Cape Town, while 60.8% of domestic tourists stayed overnight across the same period. This can be observed in Figure 8.
- As presented in Figure 9, the monthly trend of overnight stays in Cape Town reflected a similar trend amongst both international and domestic tourists, with the month of March and June spiking as the leading months for overnight stays across both tourist segments.

Figure 9: Overnight stay in Cape Town by month, Jan–Dec 2023



7. Cape Town Visitor Trends: Arrival & Departure Days

- Figures 10 and 11 show that **Friday** was the most popular day for both arrival and departure amongst the domestic tourists. It has also been observed that international tourists equally preferred to arrive and depart on **Fridays**.
- This trend could likely point to a growing interest in tourists embarking on weekend stays, departing Cape Town on a Friday to possibly explore the respective regions within the Western Cape.

Figure 10: Popular arrival days of the week in Cape Town, Jan–Dec 2023

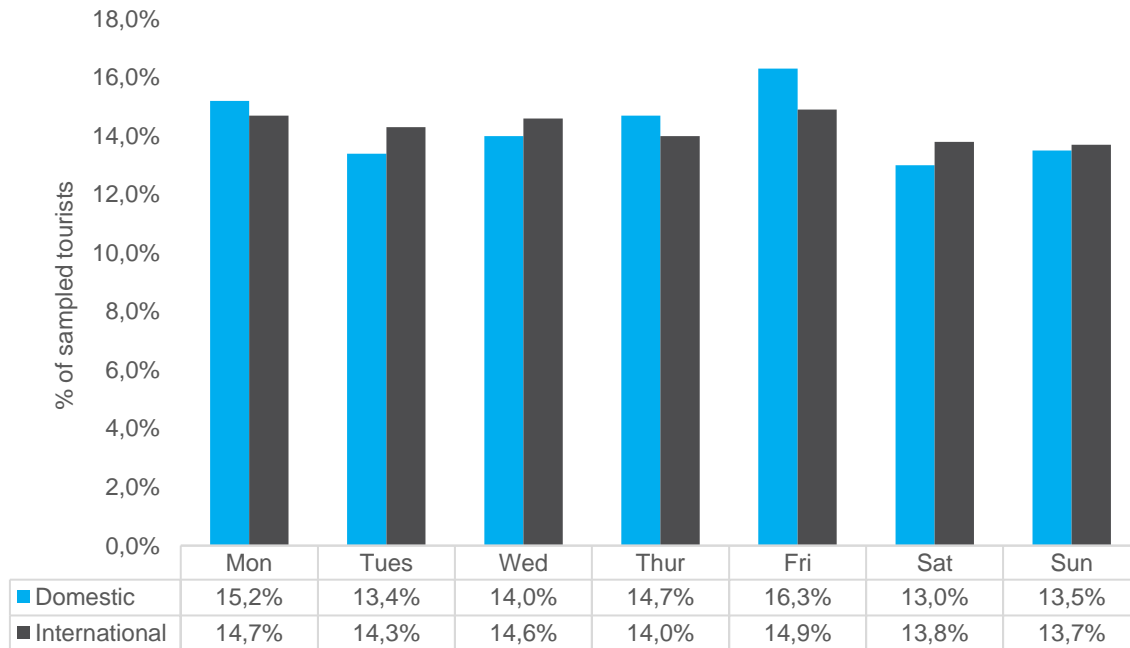
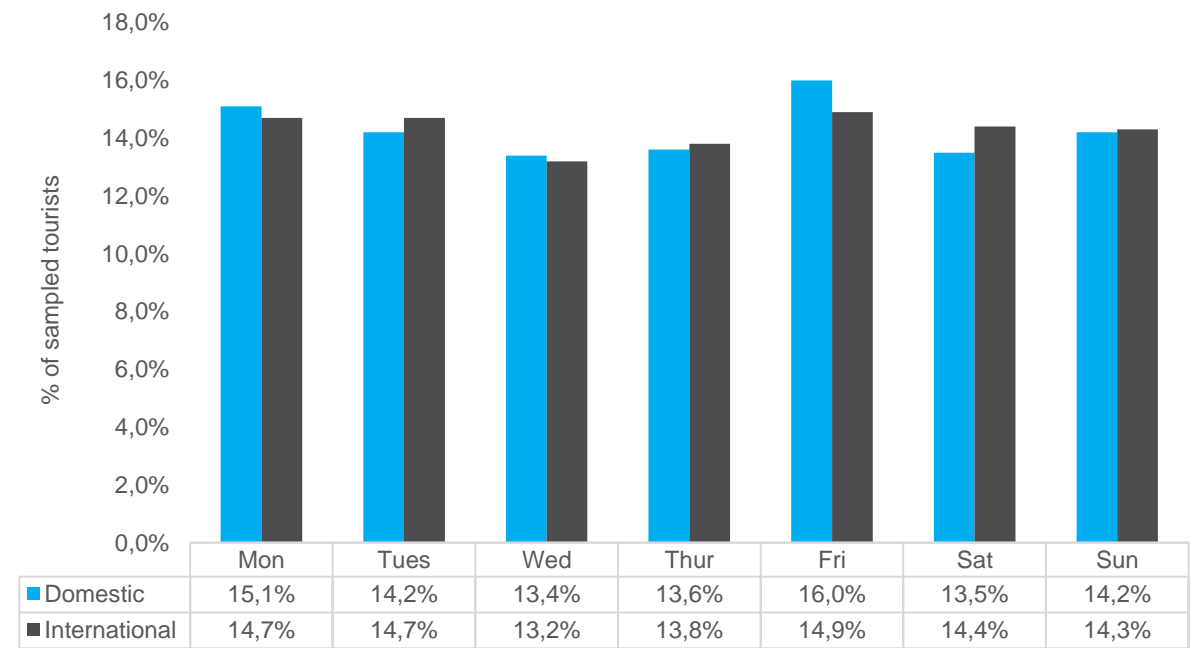



Figure 11: Popular departure days of the week from Cape Town, Jan–Dec 2023





Annual performance of Cape Town Attractions


8. Performance of Cape Town Attractions

Table 1: Performance of Cape Town attractions, Jan–Dec 2023

Cape Town	Jan–Dec 2022	Jan–Dec 2023	Y-o-Y Growth
1. Table Mountain National Park	1,788,409	2,795,838	56.3%
2. Table Mountain Aerial Cableway	682,272	984,641	44.3%
3. Table Mountain National Park: Cape of Good Hope	631,618	940,399	48.9%
4. Table Mountain National Park: Boulders	475,858	762,494	60.2%
5. Kirstenbosch National Botanical Garden	620,523	673,290	8.5%
6. Robben Island	175,962	239,641	36.2%
Total	4,374,642	6,396,303	46.2%

- Six participating attractions in Cape Town recorded a total of 6.4 million visitors collectively between January and December 2023, representing a year-on-year growth of 46.2% in relation to January–December 2022. This can be seen in Table 1.

Data Sources: SanParks, Table Mountain Aerial Cableway, Table Mountain National Park, Kirstenbosch National Botanical Gardens and Robben Island (2024)



Appendix: ROVE Mobile Location Data Key Terms and Definitions

Definitions of Mobile Location Data and Tourists vs non-Tourists

- About Mobile Location Data

- Privacy compliant data is collected from location-enabled apps on mobile devices. Data is collected when those location-enabled mobile devices enter our geo-fenced areas.
- Data is collected through applications (news, weather, games, texting apps, traffic, etc).
 - Year-over-year numbers could be skewed by increased app penetration and data privacy settings/policies.
 - The exception is China which does not share data...
- Think of mobile data like survey data on steroids.
 - A sample size greater than 30 yields a 95% level of confidence.
 - This may be the largest sample size of data pertaining to visitors•
- This should not be compared to visitation data.•
- Many factors impact total sample size:
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors

- Who Are Tourists?

- A tourist is typically defined as follows:
 - A visitor who does not live or work within the study geography
 - A visitor who travels a minimum distance to the study geography
 - A visitor who appears in the study geography for a minimum period of time (exclude commuters/passers through, etc.)

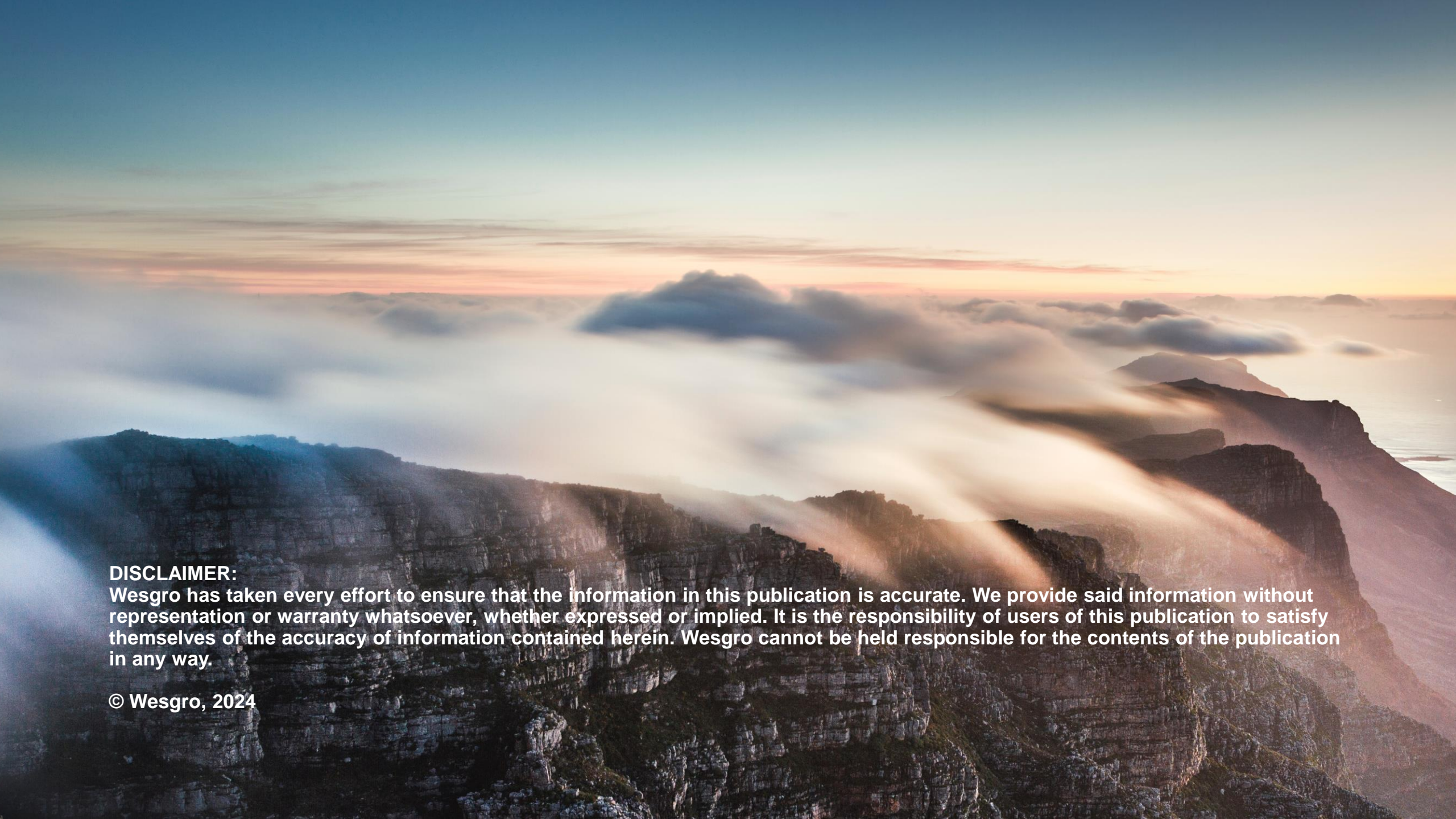
Source: Rove (2024)

Definitions of Mobile Location Data and Tourists vs non-Tourists

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled more than 25 miles (40km), and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists Minimum distance travelled to meet the definition of tourist. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon Minimum duration of visit of 120 minutes excludes commuters driving through each region 		
Secondary Study Geography		Tourists are defined as:
City or Town	When a visitor does not live or work in the city or town and they have travelled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as tourists to the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance travelled. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon 		
Point of Interest Study Geography		Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist	
Notes and Considerations: <ul style="list-style-type: none"> Any 90-day period refers to any consecutive 90 days in their mobile location data history Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). 		
What are Tourist Segments?		
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same region. Domestic Tourists: Tourists who reside in South Africa outside of the Western Cape International Tourists: Tourists who reside outside of South Africa 		

Glossary of Key Terms

Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	Often destinations want to derive insights about sub-geographies within their destination, such as counties, tourism regions, and city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city districts.
Sample	Not all people carry GPS-enabled, opted in mobile devices with location services always activated. Thus, in any period of time, in any given study geography, mobile location data is a sample. Therefore, whenever this whitepaper discusses “visitors” or “tourists” or “residents” or any other grouping of devices, it should always be understood to be a sampling of real-world visitorship or foot traffic.
Visitors	Mobile devices seen within the study geography during a specific period of time
Common Evening Location (CEL)	Derived latitude-longitude point near which a device spends most of its time on evenings and/or weekends. While most often associated with a device’s home, there is nothing that inherently guarantees that it is a home (e.g. a person who works an overnight shift at a power plant).
Common Daytime Location (CDL)	Derived latitude-longitude point near which a device spends most of its traditional workweek [Monday to Friday, 8am to 6pm local time]. While most often associated with a device’s office or work location, there is nothing that inherently guarantees that it is an office or work location (e.g. a person who is a stay-at-home parent).
Residents/Workers/Locals	Terms referring to a visitor segment comprising devices which are determined to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography. For most tourism analyses, these devices are eliminated from the project because they are not, by definition, tourists. However, it is possible to include these devices within a broader visitor study.
Tourists	Term generally referring to a visitor segment comprising devices which are determined NOT to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography but have come to the study geography from a different origin market.
Tourist Segments	Groupings of tourist segments which have a defining characteristic associated with their appearance in a study geography, such as “Short Haul Tourists” or “International Tourists” or “In State Tourists.”
Overnighters	Term which characterises a specific visitor segment where mobile devices are seen in the study geography for more than one consecutive day. An overnight stay is defined as tourists who arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterises a specific visitor segment where mobile devices are seen in the study geography for less than one day.
Length of Stay	Duration of trip within the study geography. The methodology for calculating length of stay is based on the characteristics of the geography.



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