



# Tourism Research Overview August 2024

Cape Town & the Western Cape

# Key terms and definitions referenced in this report:

- **Tourist Arrivals to Cape Town (via air)** display statistics obtained from Statistics South Africa's (StatsSA) monthly International Tourism statistical releases. It displays tourist arrivals to Cape Town via air for both the overseas and the rest of Africa markets.
- **ACSA Two-way passengers:** All (both local and foreign) travellers passing both ways (arriving & departing) through immigration at the international or domestic terminal of Cape Town International Airport (CTIA).

## Definitions referenced in this report:

- **Tourist (overnight visitor)** is a visitor who stays at least one night in the place visited. (UNWTO methodology, obtained from South African Tourism)
- **Region** refers to the following country classification (StatsSA):
  - **Overseas:** Refers to all continents outside Africa, i.e. Europe, North America, Central and South America, Australasia, the Middle East and Asia.
  - **Africa:** SADC and 'other' Africa (East and Central Africa, West Africa and North Africa).
  - **SADC** refers to the 14 countries, excluding South Africa, which belong to the Southern African Development Community.
  - **Country** refers to individual countries within a region. The country of residence is used. The country of residence should not be confused with the country from which the visitor travelled.

# Key Findings

## Air Arrivals to Cape Town (Source: StatsSA)

- Air arrivals to Cape Town recorded a 6% year-on-year increase over the period January to August 2024, reaching a total of 597,604. Between Jan–Aug 2024, the dominant share (90%) of air arrivals to Cape Town were from overseas markets and around 10% originated from the rest of Africa.
- Between Jan and Aug 2024, the UK led as the top overseas air market to Cape Town, followed by the USA, Germany, Netherlands and France in the remaining top 5 positions. Over the period under review, 6 out of the top 10 source markets originated from the European continent. In relation to the same period in 2019 (Jan–Aug), 7 out of the top 10 source markets have reached full recovery.
- Across the Jan–Aug 2024 period, Cape Town held close to 60% of South Africa's German air arrivals, close to 50% of Switzerland air arrivals and around 40% of air arrivals were from the UK, Netherlands and Italy (respectively).

## Performance of Western Cape Attractions (Sources: Attractions, SANParks, CapeNature and Local Tourism Offices)

- 41 participating attractions across the six regions of the Western Cape recorded a total of 1,771,143 visitors between January and August 2024, a 19% growth in the number of visitors compared to January–August 2023.
- The top 5 participating Western Cape attractions with the highest volume of visitors between January and August 2024 were recorded for: Table Mountain National Park: Cape of Good Hope (640,947 visitors), Table Mountain National Park: Boulders (534,692 visitors), Robben Island (149,961 visitors), Keurbooms River Nature Reserve (85,733 visitors) and Robberg Nature Reserve (77,657 visitors).

# Key Findings Continued:

## Air Passenger Forward Bookings (Source: ForwardKeys)

- Based on ForwardKeys AAT (Actual Air Tickets) data, the largest volume of forward tickets for the period Sep 2024–Feb 2025 will originate from the UK, USA, Germany and the Netherlands. Across the period Sep 2024–Feb 2025, the dominant share of forward tickets from the UK were booked for December 2024, September 2024 registered the largest share of tickets from the USA, while October and November 2024 emerged as popular travel months for the German market.

## Cape Town International Airport (CTIA) Terminal Performance (Source ACSA)

- CTIA's **international terminal** saw an 11% year-on-year growth over the period Jan–Aug 2024, with over 1.9 million two-way passengers moving through the terminal. The **domestic terminal** recorded a 7% year-on-year growth over the period Jan–Aug 2024, with over 4.6 million two-way passengers passing through the domestic terminal. George Airport recorded 519,895 two-way passengers between Jan and Aug 2024, increasing by 2% in relation to the same period in 2023 (Jan–Aug).

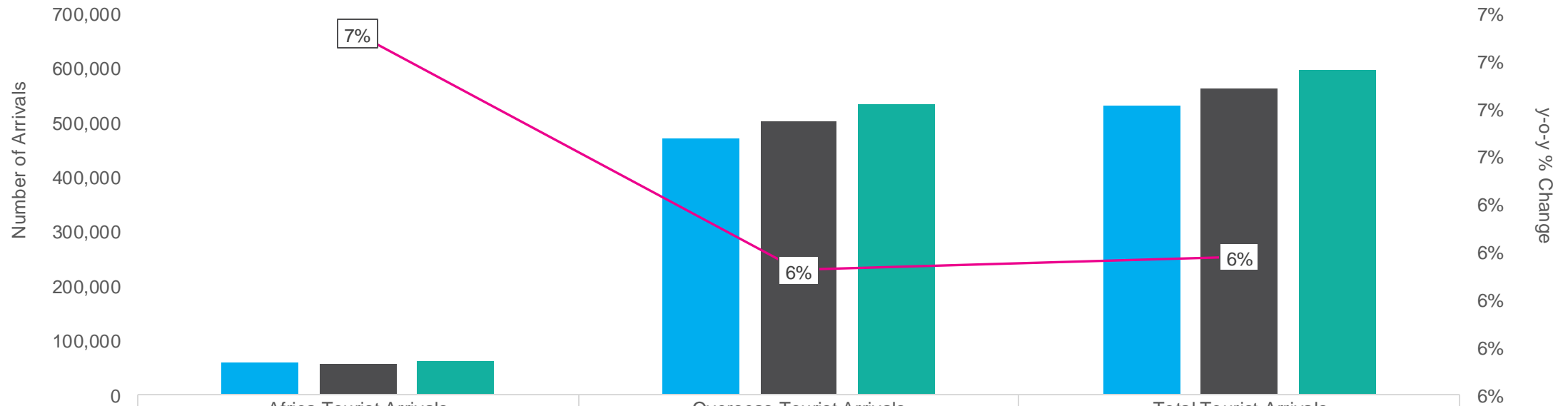
## Aviation Route Development: New Routes & Expansions (Source: Cape Town Air Access)

- **New Routes International:**
  - FlySafair will launch a new service between CPT and Windhoek, Namibia, starting 22 October, with two flights per week. This will be FlySafair's first international service out of Cape Town.
  - Airlink will add Gaborone, Botswana as a new service, starting next year April with three flights a week. Airlink already serves Maun in Botswana with a daily flight.
- **Existing Routes International:**
  - Virgin will extend its seasonal daily service between London Heathrow and CPT to end only on 30 April 2025.

# Performance of Air Arrivals to Cape Town: Jan–Aug 2024

- Total air arrivals to Cape Town recorded a 6% year-on-year increase over the period January to August 2024, reaching 597,604 tourists over the period. Between Jan–Aug 2024, the dominant share (90%) of air arrivals to Cape Town were from overseas markets and around 10% originated from the rest of Africa.

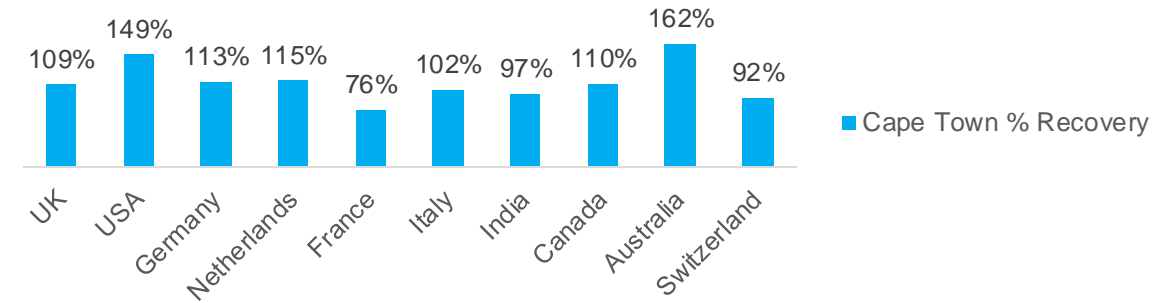
Air Arrivals to Cape Town by Origin, Jan–Aug 2024



	Africa Tourist Arrivals	Overseas Tourist Arrivals	Total Tourist Arrivals
2019	59,712	471,923	532,057
2023	57,599	504,446	562,818
2024	61,699	535,338	597,604
23/24 % Change	7%	6%	6%

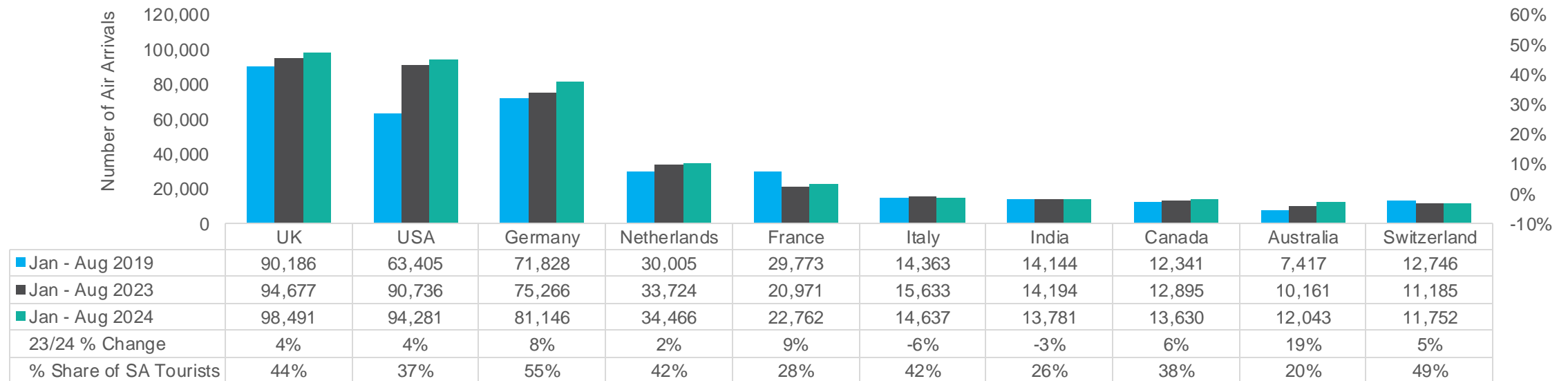
# Top Overseas Air Markets to Cape Town: Jan–Aug 2024

Between Jan and Aug 2024, the UK led as the top overseas air market to Cape Town, followed by the USA, Germany, Netherlands and France in the remaining top 5 positions. Over the period under review, 6 out of the top 10 source markets originated from the European continent. In relation to the same period in 2019 (Jan–Aug), 7 out of the top 10 source markets have reached full recovery.



Across the Jan–Aug 2024 period, Cape Town held close to 60% of South Africa’s German air arrivals, close to 50% of Switzerland air arrivals and around 40% of air arrivals were from the UK, Netherlands and Italy (respectively).

**Air Arrivals to Cape Town by Source Market, Jan–Aug 2024**



# Top Africa Air Markets to Cape Town: Jan–Aug 2024

- Between January and August 2024, Namibia led as the top air market from the rest of Africa to Cape Town, with Zimbabwe following in second position. Angola, Kenya and Mozambique followed in the rest of the top 5 positions.
- Air arrivals to Cape Town from the rest of Africa during the period Jan–Aug 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan–Aug 2019. These markets included Zimbabwe, Kenya, Mozambique, Nigeria, Ghana, Botswana and Tanzania.

Source Market	Jan–Aug 2019	Jan–Aug 2023	Jan–Aug 2024	Cape Town 2023/24 % Change	Cape Town % Recovery vs. 2019
Namibia	15 875	10 725	11 177	4%	70%
Zimbabwe	6 693	11 926	9 479	-21%	142%
Angola	15 372	9 653	8 374	-13%	54%
Kenya	3 383	6 357	6 028	-5%	178%
Mozambique	64	1 858	4 653	150%	7270%
Mauritius	3 421	2 201	2 991	36%	87%
Nigeria	1 986	1 641	2 466	50%	124%
Ghana	740	609	2 386	292%	322%
Botswana	1 322	2 197	2 128	-3%	161%
Tanzania	1 207	1 927	1 994	3%	165%

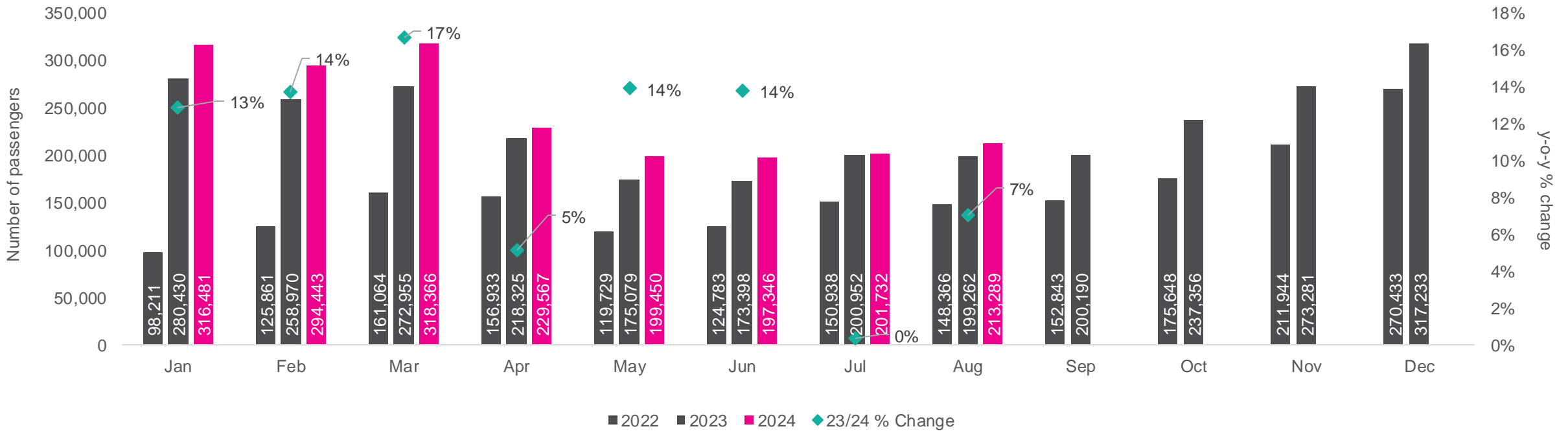


# Cape Town International Airport (CTIA): International Terminal

Year/Month	2019	2020	2021	2022	2023	2024						2024 ytd
						Mar	Apr	May	Jun	Jul	Aug	
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 807 431	318 366	229 567	199 450	197 346	201 732	213 289	1 970 674
YoY growth percentage*	1%	-69%	-35%	261%	48%	17%	5%	14%	14%	1%	7%	11%

\* Growth compared to the same period in the previous year

Passenger data source: ACSA



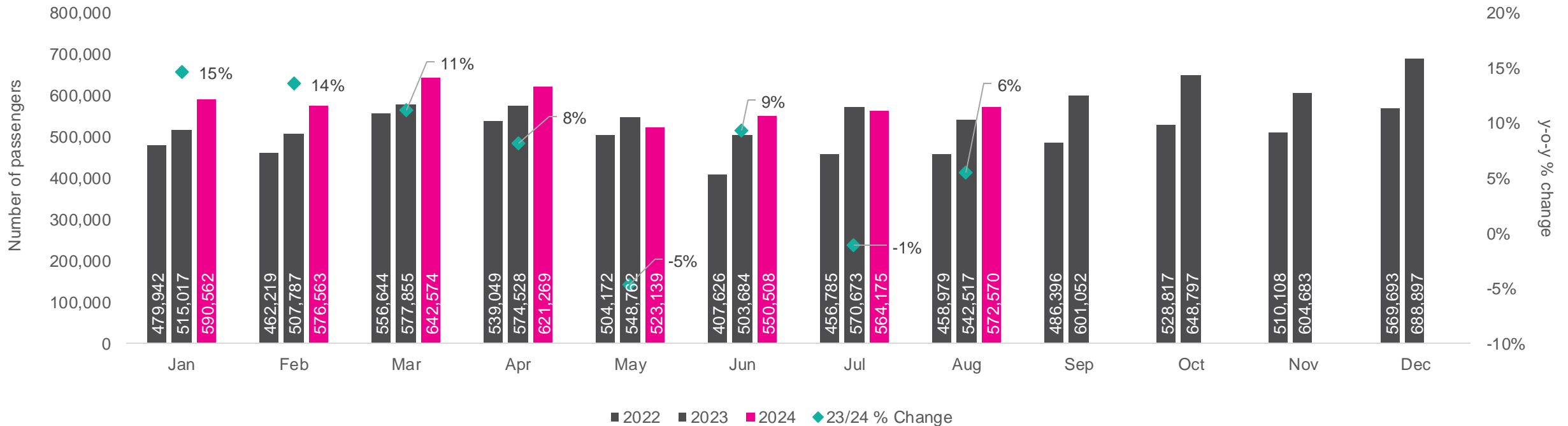


# Cape Town International Airport (CTIA): Domestic Terminal

Year/Month	2019	2020	2021	2022	2023	2024						2024 ytd
						Mar	Apr	May	Jun	Jul	Aug	
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 884 252	642 574	621 269	523 139	550 508	564 175	572 570	4 641 360
YoY growth percentage*	2%	-62%	33%	41%	16%	11%	8%	-5%	9%	-1%	6%	7%

\* Growth compared to the same period in the previous year

Passenger data source: ACSA

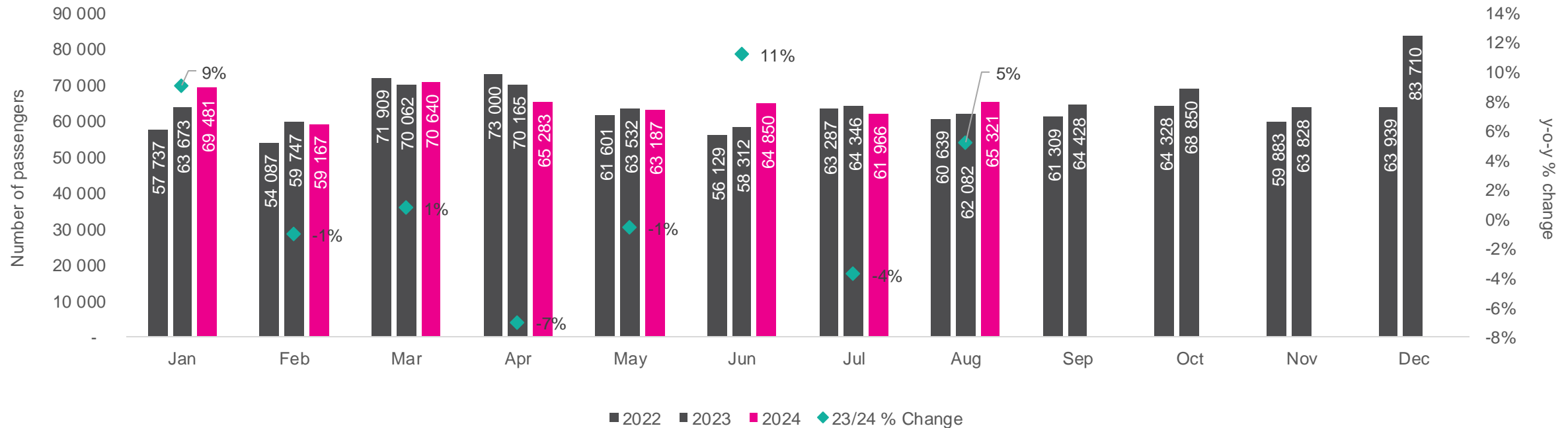


# George Airport (GRJ): Passenger performance: Jan–Aug 2024

Year/Month	2019	2020	2021	2022	2023	2024						2024 Ytd
						Mar	Apr	May	Jun	Jul	Aug	
Two-way passengers	840 804	346 223	539 637	747 848	792 735	70 640	65 283	63 187	64 850	61 966	65 321	519 895
YoY change percentage*	0.5%	-59%	56%	39%	6%	1%	-7%	-1%	11%	-4%	5%	2%

\* Growth compared to the same period in the previous year

Data source: ACSA



# CPT International schedule for IATA Summer 2024 (April–October)

## 21 airlines, 26 destinations & 170 flights per week




### Rest of Africa

	<b>Air Botswana</b>	Gaborone (GBE)   3x per week
	<b>Air Mauritius</b>	Mauritius (MRU)   2x week
	<b>Airlink</b>	Windhoek (WDH)   19x pw Walvis Bay (WVB)   13x pw Harare (HRE)   Daily Victoria Falls (VFA)   6x week Maun (MUB)   Daily Maputo (MPM)   4x week
	<b>Eswatini Air</b>	Manzini (SHO)   3x week
	<b>Ethiopian Airlines</b>	Addis Ababa (ADD)   11x per week
	<b>FlyNamibia</b>	Windhoek (WDH)   4x per week Walvis Bay (WVB)   4x per week
	<b>Kenya Airways</b>	Nairobi (NBO)   3x week, NBO – Livingstone (LVI)   3x week NBO – Victoria Falls (VFA)   3x week
	<b>LAM</b>	Maputo (MPM)   3x per week
	<b>Proflight Zambia</b>	Lusaka (LUN)   3x week
	<b>RwandAir</b>	Kigali (KGL) - Harare (HRE)   3x week
	<b>TAAG</b>	Luanda (LAD)   Daily



### Europe

	<b>British Airways</b>	London Heathrow (LHR)   Daily
	<b>KLM</b>	Amsterdam (AMS)- Daily
	<b>Lufthansa</b>	Frankfurt (FRA)   5x per week
	<b>Turkish Airlines</b>	Istanbul (IST)   Daily

### North & South America

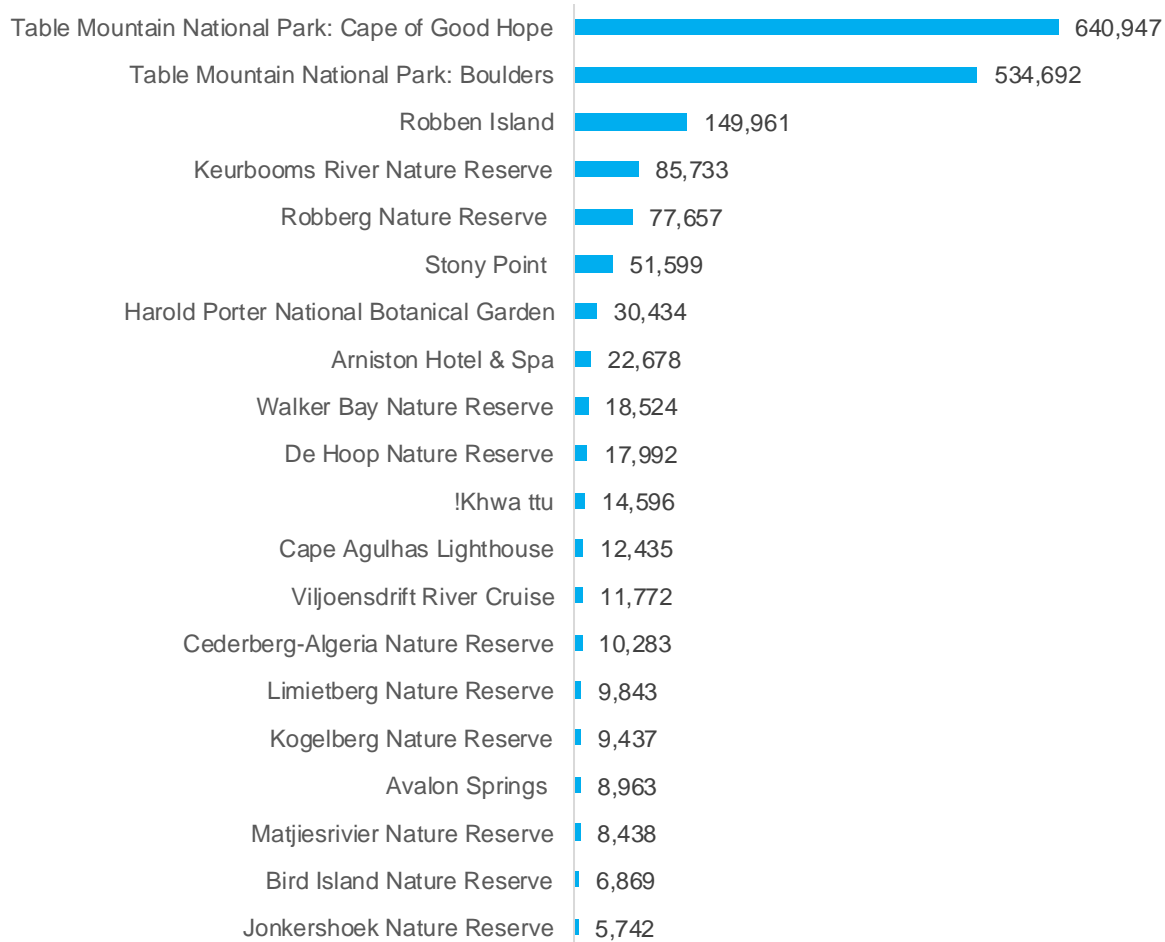
	<b>Delta Air Lines</b>	Atlanta (ATL)   3x per week
	<b>United Airlines</b>	Newark (EWR)   3x per week Washington D.C (IAD)   3x per week
	<b>South African Airways</b>	São Paulo (GRU)   2x per week

### Asia & Middle East

	<b>Emirates</b>	Dubai (DXB)   2x Daily
	<b>Qatar Airways</b>	Doha (DOH)   Daily
	<b>Singapore Airlines</b>	Singapore (SIN)*   Daily <i>*SIN-JNB-CPT-JNB-SIN</i>

# Performance of Western Cape Attractions: Jan–Aug 2024

## Top 20 Participating Western Cape Attractions Jan–Aug 2024



41 participating attractions across the six regions of the Western Cape recorded a total of 1,771,143 visitors between January and August 2024, a 19% growth in the number of visitors compared to January–August 2023.

**The top 5 participating Western Cape attractions with the highest volume of visitors between January and August 2024 were recorded for:**

1. Table Mountain National Park: Cape of Good Hope (640,947 visitors)
2. Table Mountain National Park: Boulders (534,692 visitors)
3. Robben Island (149,961 visitors)
4. Keurbooms River Nature Reserve (85,733 visitors)
5. Robberg Nature Reserve (77,657 visitors)

# Performance of Western Cape Attractions: Jan–Aug 2024

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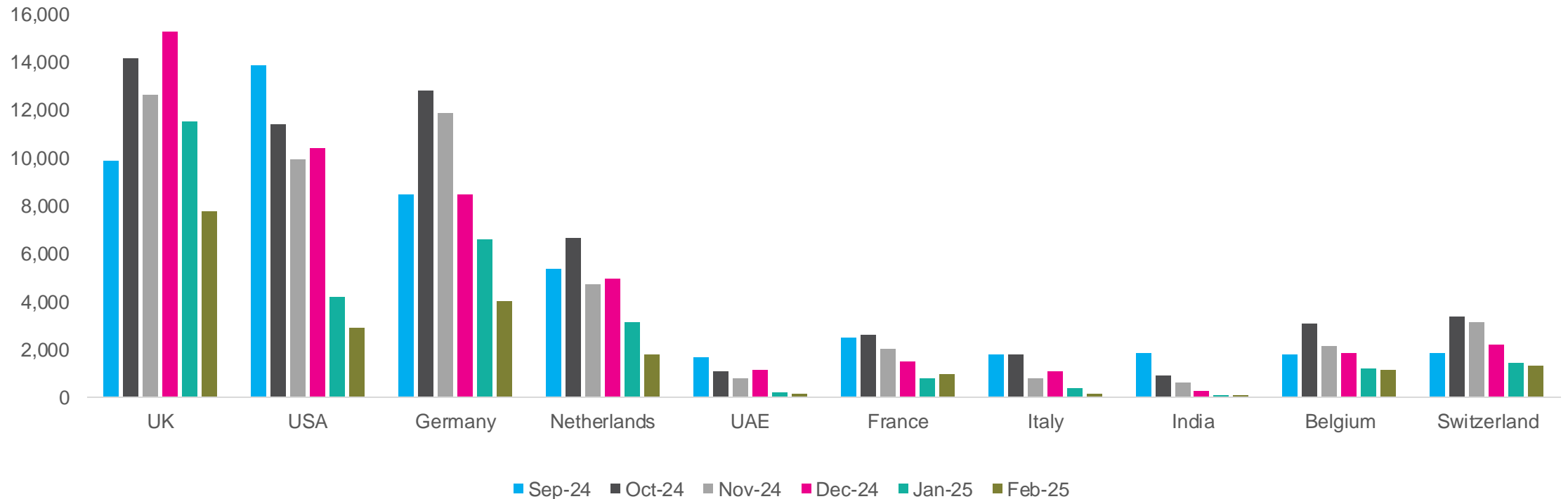
Western Cape Attractions	Jan–Aug 2023	Jan–Aug 2024	Y-o-Y Growth
<b>Cape Town</b>			
Table Mountain National Park: Cape of Good Hope	580 911	640 947	10%
Table Mountain National Park: Boulders	458 183	534 692	17%
Robben Island	142 808	149 961	5%
<b>Total</b>	<b>1 181 902</b>	<b>1 325 600</b>	<b>12%</b>
<b>Overberg</b>			
Stony Point	11 162	51 599	362%
Harold Porter National Botanical Garden	29 294	30 434	4%
Arniston Hotel & Spa	22 553	22 678	1%
Walker Bay Nature Reserve	10 952	18 524	69%
De Hoop Nature Reserve	7 812	17 992	130%
Cape Agulhas Lighthouse	13 679	12 435	-9%
Kogelberg Nature Reserve	5 019	9 437	88%
Grootvadersbosch Nature Reserve	4 920	5 044	3%
Marloth Nature Reserve	4 175	4 522	8%
Shipwreck Museum	1 591	1 815	14%
The Whale Trail	2 204	1 480	-33%
Stony Point Eco Venue	409	989	142%
Grootvadersbosch Eco Venues	1 031	682	-34%
De Mond Nature Reserve	3 922	513	-87%
Elim Heritage Centre	532	461	-13%
<b>Total</b>	<b>119 255</b>	<b>178 605</b>	<b>50%</b>
<b>Garden Route &amp; Klein Karoo</b>			
Keurbooms River Nature Reserve	44 716	85 733	92%
Robberg Nature Reserve	49 443	77 657	57%
Goukamma Nature Reserve	1 142	1 412	24%
<b>Total</b>	<b>95 301</b>	<b>164 802</b>	<b>73%</b>

Weskus	Jan–Aug 2023	Jan–Aug 2024	Y-o-Y Growth
!Khwa ttu	13 976	14 596	4%
Cederberg-Algeria Nature Reserve	7 826	10 283	31%
Matjiesrivier Nature Reserve	8 010	8 438	5%
Bird Island Nature Reserve	6 392	6 869	7%
Cederberg-Kliphuis Nature Reserve	2 789	2 960	6%
Groot Winterhoek Wilderness Area	1 971	2 124	8%
Rocherpan Nature Reserve	1 373	1 350	-2%
<b>Total</b>	<b>42 337</b>	<b>46 620</b>	<b>10%</b>
<b>Cape Winelands</b>			
Viljoensdrift River Cruise	8 443	11 772	39%
Limietberg Nature Reserve	11 841	9 843	-17%
Avalon Springs	7 372	8 963	22%
Jonkershoek Nature Reserve	3 725	5 742	54%
Birds Paradise	4 391	5 531	26%
Vrolijkheid Nature Reserve	4004	4 229	6%
Hottentots Holland Nature Reserve	1 749	2 542	45%
Protea Tractor Trip	2 637	2 409	-9%
Assegaaibosch Nature Reserve	667	1 492	124%
Vrolijkheid Eco Venue	513	614	20%
<b>Total</b>	<b>45 342</b>	<b>53 137</b>	<b>17%</b>
<b>Cape Karoo</b>			
Gamkaberg Nature Reserve	908	1 371	51%
Anysberg Nature Reserve	352	826	135%
Swartberg Nature Reserve	87	182	109%
<b>Total</b>	<b>1 347</b>	<b>2 379</b>	<b>77%</b>
<b>Total for all attractions (Jan–Aug 2023 &amp; Jan–Aug 2024)</b>	<b>1 485 484</b>	<b>1 771 143</b>	<b>19%</b>

# Air Passenger Forward Bookings: Sep 24–Feb 25

- Based on ForwardKeys AAT (Actual Air Tickets) data, the largest volume of forward tickets for the period Sep 2024–Feb 2025 will originate from the UK, USA, Germany and the Netherlands. Across the period Sep 2024–Feb 2025, the dominant share of forward tickets from the UK were booked for December 2024, September 2024 registered the largest share of tickets from the USA, while October and November 2024 emerged as popular travel months for the German market.

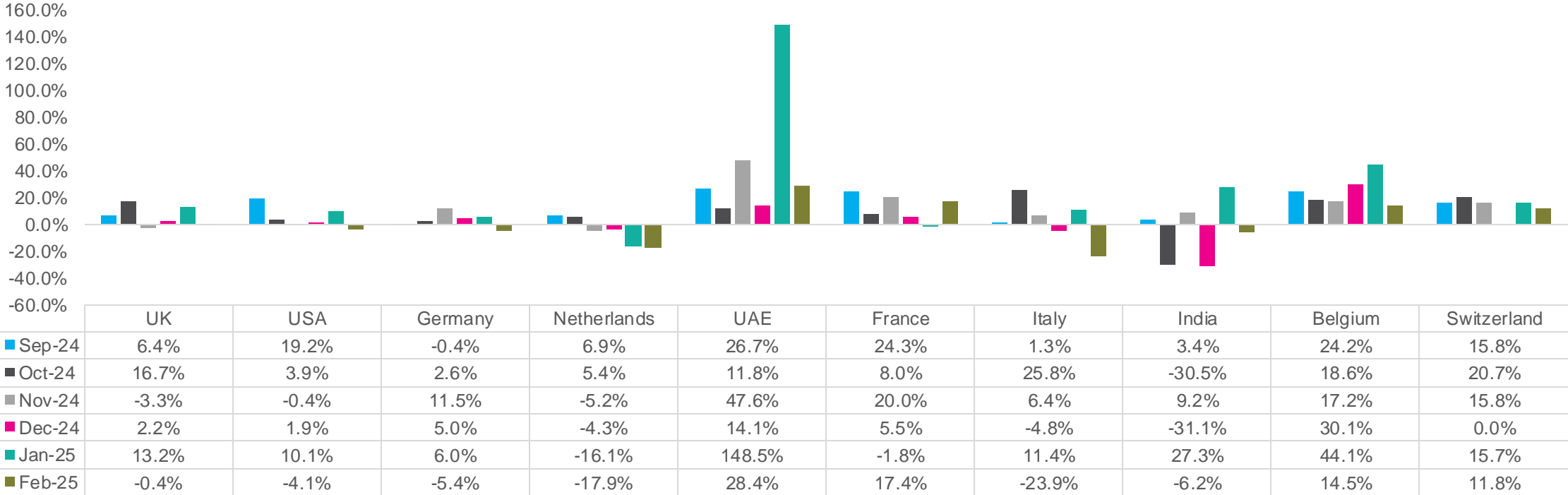
Number of Forward Bookings by Source Market, Sep 24–Feb 25



# Air Passenger Forward Bookings: Sep 24–Feb 25

- Based on ForwardKeys Actual Air Tickets (AAT) data, forward tickets for the period Sep 2024–Feb 2025 indicated that the highest year-on-year (y-o-y) growth in bookings will be from the UAE source market, reaching a significant 148.5% increase in tickets booked for January 2025. Amongst the traditional markets, the highest y-o-y growth in UK passengers will be reached during October 2024, while the highest growth in forward bookings from Germany (11.5%) will occur in November 2024. Forward tickets booked from the USA market reflects the highest increase for September 2024.

YoY % Change in Forward Bookings by Source Market, Sep 2024–Feb 2025







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