



Tourism Research Overview

July 2024

Cape Town & the Western Cape

Key Terms and Definitions

- **Tourist Arrivals to Cape Town (via air)** displays 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. (obtained from South African Tourism (SAT))
- **Region** refers to the following country classification (StatsSA):
 - **Overseas:** 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).
 - **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.
 - **SADC** refers to the 14 countries, excluding South Africa, which belong to the Southern African Development Community.
 - **Overseas** refers to all continents outside Africa.

Key Findings

Tourist Arrivals to Cape Town (via air) (Source: StatsSA)

- Tourist arrivals to Cape Town (via air) recorded a 9% year-on-year increase over the period January to July 2024, reaching 551,469 tourists, with 90% of air arrivals to Cape Town originating from overseas markets and 10% from the rest of Africa.
- Between Jan and Jul 2024, UK led as the top overseas air market to Cape Town, followed by USA, Germany, Netherlands and France in the top 5 positions. The European region continued to hold a strong presence in the Western Cape, with 6 out of the top 10 source markets originating from the continent over the period. Overseas air arrivals to Cape Town during the period Jan – Jul 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Jul 2019. These markets include the UK, USA, Germany, Netherlands, India, Canada, Australia and Italy.
- Between January and July 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 – Jul 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan – Jul 2019. These markets included Zimbabwe, Kenya, Mozambique, Nigeria, Ghana, Botswana and Tanzania.

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

- 50 participating attractions across the six regions of the Western Cape recorded a total of 4,440,252 visitors between January and July 2024, a 16% growth in the number of visitors compared to January–July 2023.
- The top 5 participating Western Cape attractions with the highest volume of visitors between January and July 2024 were recorded for Table Mountain National Park (1,698,135 visitors); Table Mountain Aerial Cableway (584,697 visitors); Table Mountain National Park: Cape of Good Hope (559,098 visitors); Table Mountain National Park: Boulders (470,353 visitors); Kirstenbosch National Botanical Garden (348,364 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 Jul – Dec 2024 will originate from the UK, Germany, USA and the Netherlands. Across the period Jul – Dec 2024, the dominant share of forward tickets from the UK were booked for December 2024, while October and November 2024 will be more popular months for travel from Germany. During August and September 2024, the largest volume of forward tickets originated from the USA, with over 11,000 forward bookings, respectively.

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

- CTIA's **international terminal** saw a 11% year-on-year growth over the period Jan – Jul 2024, with over 1.7 million two-way passengers moving through the terminal. The **domestic terminal** recorded an 7% year-on-year growth over the period Jan – Jul 2024, with over 4.0 million two-way passengers passing through the domestic terminal. George Airport recorded 454,574 two-way passengers between Jan and Jul 2024, increasing by 1% in relation to the same period in 2023 (Jan – Jul).

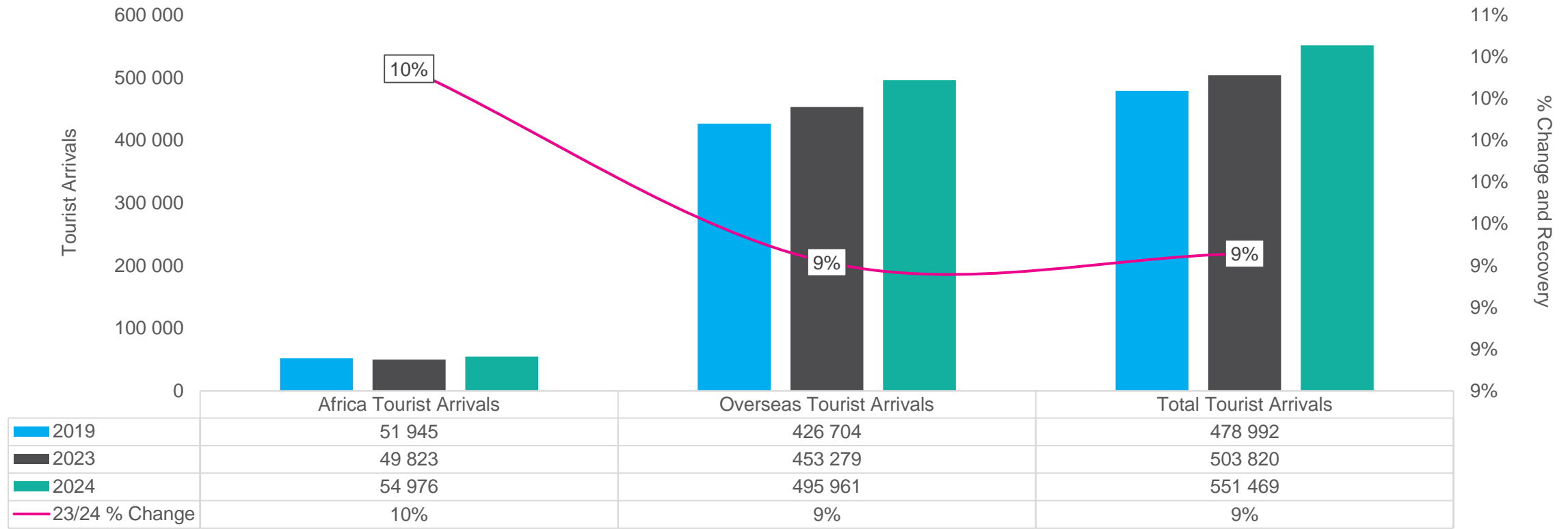
Aviation Route Development: New Routes & Expansions (Source: Cape Town Air Access)

- **New Route:** Air Botswana will launch two new services - Kasane and Maun each with 3 weekly flights - starting 1 November. The carrier will also increase frequencies on its existing Gaborone - CPT route from 3 - 5 weekly flights.
- **Existing Routes:** From 10 January, British Airways will operate its London Heathrow – CPT service with triple-daily flights, replacing the three weekly flights from their Gatwick service. Kenya Airways is now operating all flights on its existing non-stop Nairobi – CPT route with a Boeing 787-8 from 1 August 2024.

Performance of Air Arrivals to Cape Town: Jan – Jul 2024

- Tourist arrivals to Cape Town (via air) recorded a 9% year-on-year increase over the period January to July 2024, reaching 551,469 tourists over the period. Between Jan – Jul 2024, 90% of air arrivals to Cape Town were from overseas markets and 10% from the rest of Africa.

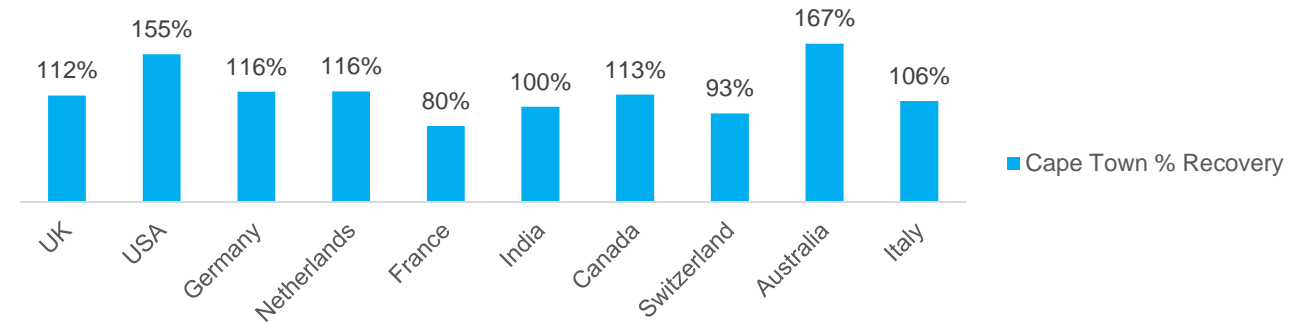
Tourist Arrivals to Cape Town (via air) by Origin, Jan - Jul 2024



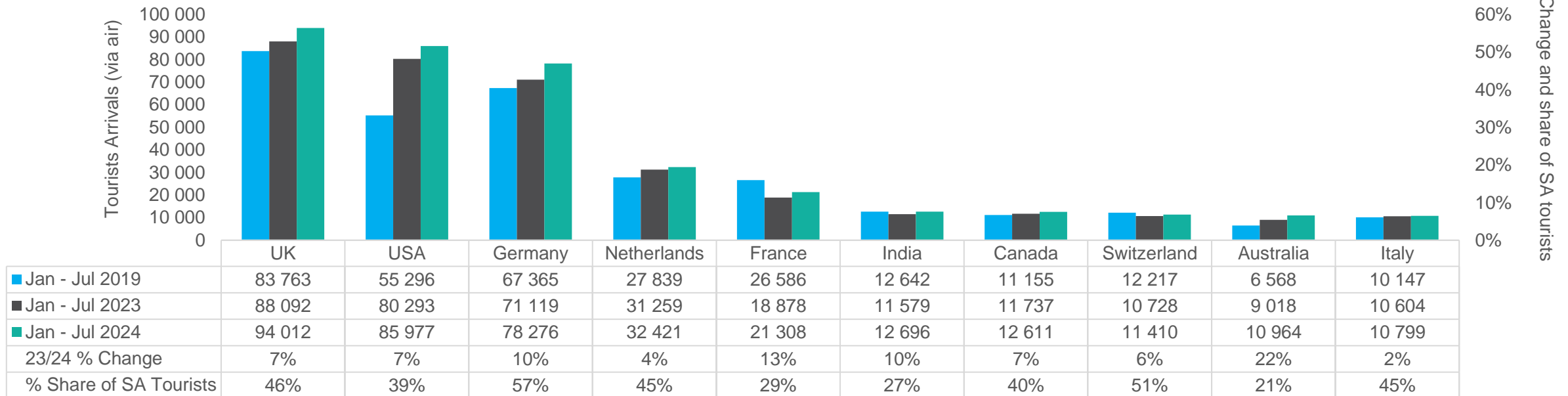
Source: StatsSA, 2024

Top Overseas Markets to Cape Town (via air): Jan – Jul 2024

Between Jan and Jul 2024, UK led as the top overseas air market to Cape Town, followed by USA, Germany, Netherlands and France in the top 5 positions. The European region continued to hold a strong presence in the Western Cape, with 6 out of the top 10 source markets originating from the continent over the period under review.



Tourist Arrivals to Cape Town (via air), Jan - Jul 2024



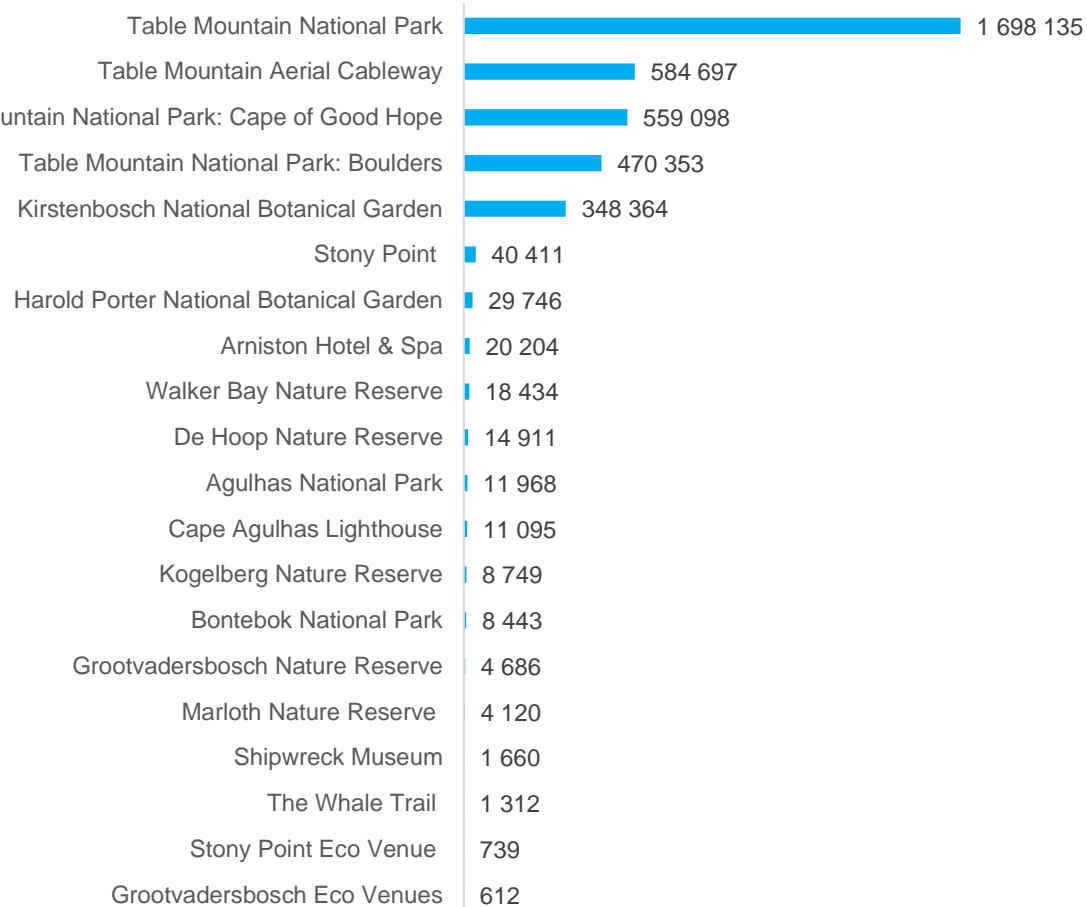
Top Africa Markets to Cape Town (via air): Jan – Jul 2024

- Between January and July 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 – Jul 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan – Jul 2019. These markets included Zimbabwe, Kenya, Mozambique, Nigeria, Ghana, Botswana and Tanzania.

Source Market	Jan - Jul 2019	Jan - Jul 2023	Jan - Jul 2024	Cape Town 2023/24 % Change	Cape Town % Recovery over 2019
Namibia	14 042	9 487	10 136	7%	72%
Zimbabwe	5 720	10 070	8 115	-19%	142%
Angola	13 244	8 392	7 094	-15%	54%
Kenya	2 999	5 634	5 465	-3%	182%
Mozambique	58	1 583	4 180	164%	7207%
Mauritius	3 011	1 786	2 793	56%	93%
Nigeria	1 805	1 337	2 204	65%	122%
Ghana	556	559	2 114	278%	380%
Botswana	1 105	1 936	1 929	0%	175%
Tanzania	1 092	1 580	1 841	17%	169%

Performance of Western Cape Attractions, Jan–Jul 2024

Top 20 Participating Western Cape Attractions Jan–Jul 2024



50 participating attractions across the six regions of the Western Cape recorded a total of 4,440,252 visitors between January and July 2024, a 16% growth in the number of visitors compared to January–July 2023.

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

1. Table Mountain National Park (1,698,135 visitors)
2. Table Mountain Aerial Cableway (584,697 visitors)
3. Table Mountain National Park: Cape of Good Hope (559,098 visitors)
4. Table Mountain National Park: Boulders (470,353 visitors)
5. Kirstenbosch National Botanical Garden (348,364 visitors)

Performance of Western Cape Attractions, Jan–Jul 2024

Continued...

Western Cape Attractions	Jan–Jul 2023	Jan–Jul 2024	Y-o-Y Growth
Cape Town			
Table Mountain National Park	1 461 831	1 698 135	16%
Table Mountain Aerial Cableway	528 550	584 697	11%
Table Mountain National Park: Cape of Good Hope	499 803	559 098	12%
Table Mountain National Park: Boulders	393 979	470 353	19%
Kirstenbosch National Botanical Garden	364 734	348 364	-4%
Total	3 248 897	3 660 647	13%
Overberg			
Stony Point	11 162	40 411	262%
Harold Porter National Botanical Garden	26 160	29 746	14%
Arniston Hotel & Spa	19 911	20 204	1%
Walker Bay Nature Reserve	9 701	18 434	90%
De Hoop Nature Reserve	6 579	14 911	127%
Agulhas National Park	14 136	11 968	-15%
Cape Agulhas Lighthouse	12 423	11 095	-11%
Kogelberg Nature Reserve	4 230	8 749	107%
Bontebok National Park	8 773	8 443	-4%
Grootvadersbosch Nature Reserve	4 575	4 686	2%
Marloth Nature Reserve	3 808	4 120	8%
Shipwreck Museum	1 467	1 660	13%
The Whale Trail	1 880	1 312	-30%
Stony Point Eco Venue	272	739	172%
Grootvadersbosch Eco Venues	823	612	-26%
De Mond Nature Reserve	3 748	468	-88%
Elim Heritage Centre	512	461	-10%
Total	130 160	178 019	37%
Garden Route & Klein Karoo			
Tsitsikamma National Park	135 516	162 313	20%
Keurbooms River Nature Reserve	44 716	82 071	84%
Robberg Nature Reserve	49 443	65 763	33%
Wilderness National Park	51 367	61 306	19%
Knysna National Park	19 721	24 619	25%
Goukamma Nature Reserve	1 142	1 198	5%
Total	301 905	397 270	32%

Weskus	Jan–Jul 2023	Jan–Jul 2024	Y-o-Y Growth
West Coast National Park	60 480	99 183	64%
!Khwa ttu	11 865	12 499	5%
Cederberg-Algeria Nature Reserve	7 168	9 009	26%
Matjiesrivier Nature Reserve	7 700	7 498	-3%
Bird Island Nature Reserve	4 930	5 767	17%
Cederberg-Kliphuis Nature Reserve	2 662	2 231	-16%
Groot Winterhoek Wilderness Area	1 832	2 115	15%
Rocherpan Nature Reserve	1 127	1 125	0%
Total	97 764	139 427	43%
Cape Winelands			
Viljoensdrift River Cruise	7 631	11 772	54%
Limietberg Nature Reserve	11 496	9 747	-15%
Avalon Springs (Day Visitors)	6 311	8 152	29%
Jonkershoek Nature Reserve	3 725	5 129	38%
Birds Paradise	3 910	5 031	29%
Vrolijkheid Nature Reserve	3 604	3 637	1%
Hottentots Holland Nature Reserve	1 691	2 334	38%
Protea Tractor Trip	2 405	2 126	-12%
Assegaaibosch Nature Reserve	667	1 394	109%
Vrolijkheid Eco Venue	433	524	21%
Total	41 873	49 846	19%
Cape Karoo			
Karoo National Park	15 348	12 961	-16%
Gamkaberg Nature Reserve	798	1 218	53%
Anysberg Nature Reserve	294	699	138%
Swartberg Nature Reserve	67	165	146%
Total	16 507	15 043	-9%
Total for all attractions (Jan–Jul 2023 & Jan–Jul 2024)	3 837 106	4 440 252	16%

NB: Total number of visitors ranked from highest to lowest by region

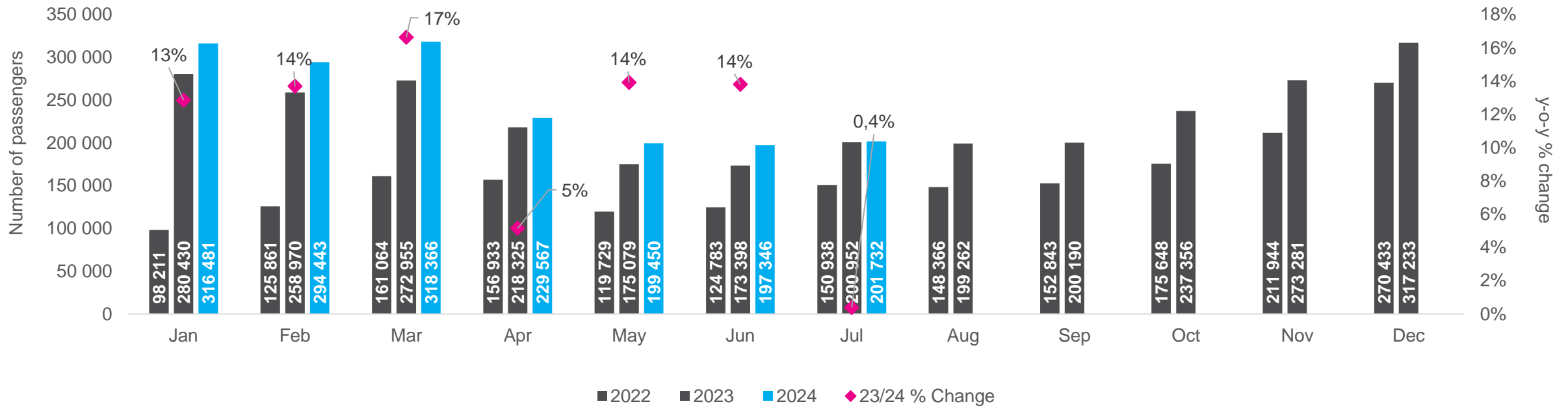
Sources: LTOs, CapeNature and SANParks (2024)

Cape Town International Airport (CTIA): International Terminal

Year/Month	2019	2020	2021	2022	2023	2024						2024 ytd
						Feb	Mar	Apr	May	Jun	Jul	
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 807 431	294 443	318 366	229 567	199 450	197 346	201 732	1 757 385
YoY growth percentage*	1%	-69%	-35%	261%	48%	14%	17%	5%	14%	14%	1%	11%

* Growth compared to the same period in the previous year

Passenger data source: ACSA

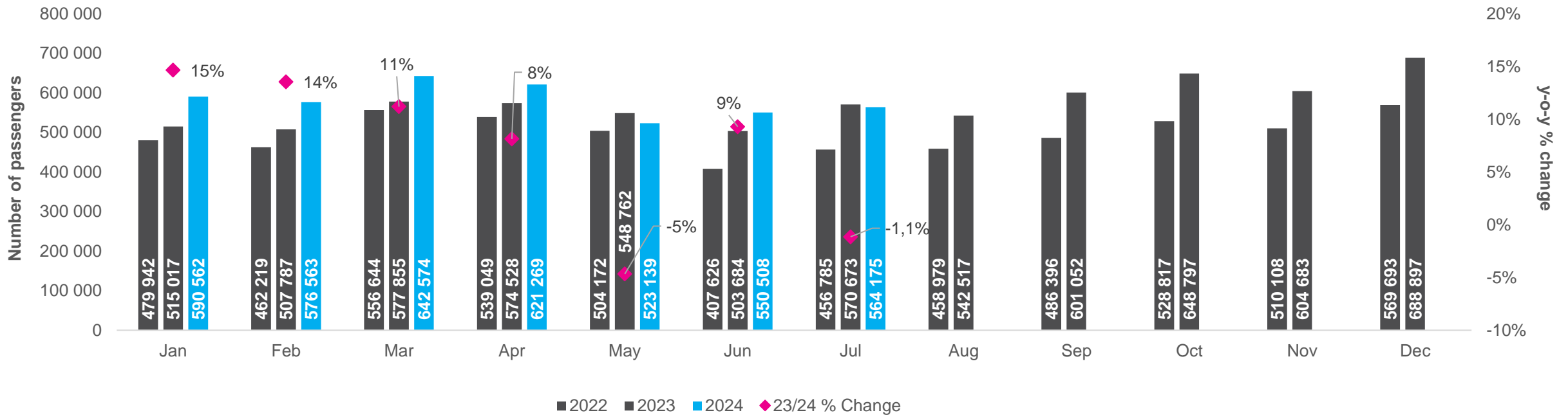


Cape Town International Airport (CTIA): Domestic Terminal

Year/Month	2019	2020	2021	2022	2023	2024						2024 ytd
						Feb	Mar	Apr	May	Jun	Jul	
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 884 252	576 563	642 574	621 269	523 139	550 508	564 175	4 068 790
YoY growth percentage*	2%	-62%	33%	41%	16%	14%	11%	8%	-5%	9%	-1%	7%

* Growth compared to the same period in the previous year

Passenger data source: ACSA

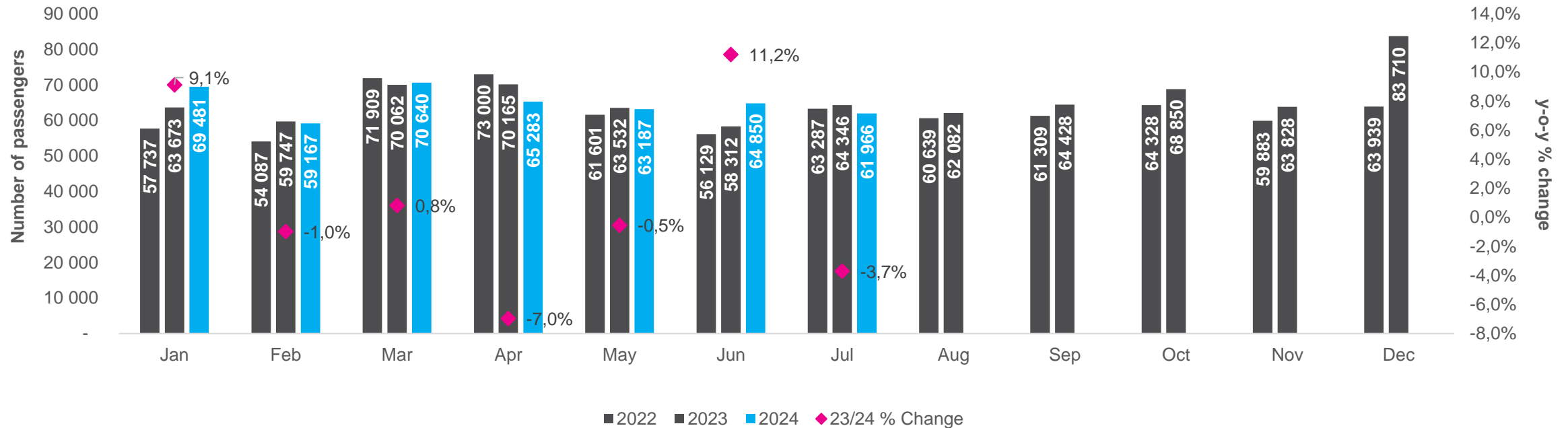


George Airport (GRJ): Passenger performance: Jan – Jul 2024

Year/Month	2019	2020	2021	2022	2023	2024						2024 Ytd
						Feb	Mar	Apr	May	Jun	Jul	
Two-way passengers	840 804	346 223	539 637	747 848	792 735	59 167	70 640	65 283	63 187	64 850	61 966	454 574
YoY change percentage*	0.5%	-59%	56%	39%	6%	-1%	1%	-7%	-1%	11%	-4%	1%

* 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

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




Europe

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

North & South America

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

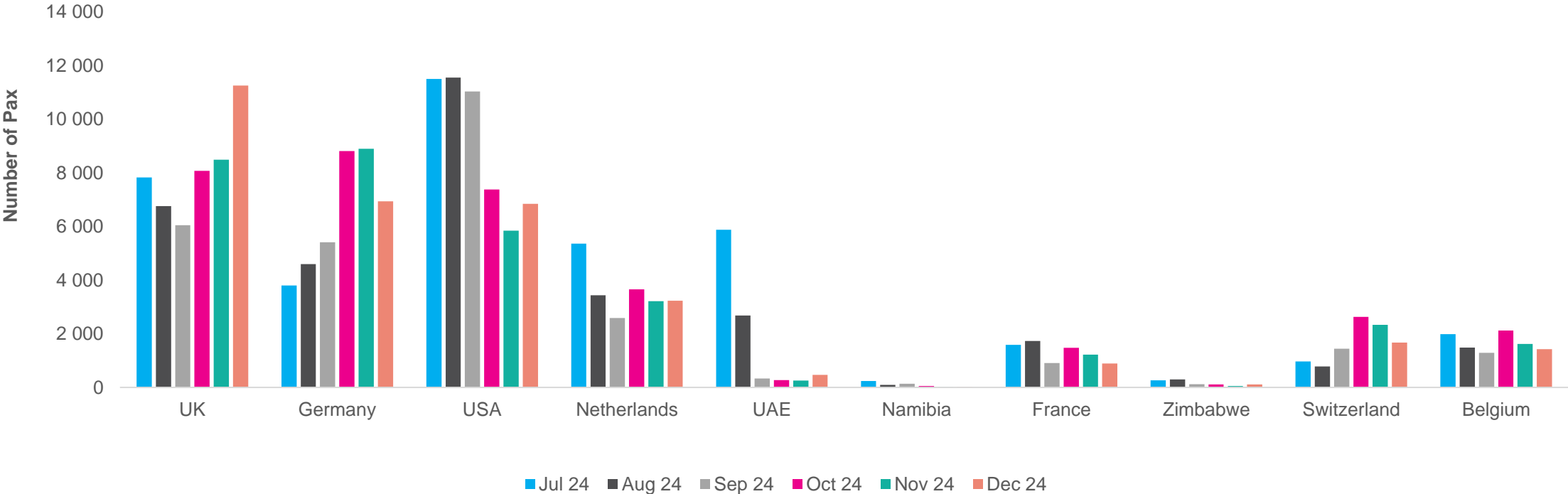
Asia & Middle East

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

Air Passenger Forward Bookings: Jul 24 – Dec 24

- Based on ForwardKeys AAT (Actual Air Tickets) data, the largest volume of forward tickets for the period Jul – Dec 2024 will originate from the UK, Germany, USA and the Netherlands. Across the period Jul – Dec 2024, the dominant share of forward tickets from the UK were booked for December 2024, while October and November 2024 will be more popular months for travel from Germany. During August and September 2024, the largest volume of forward tickets originated from the USA, with over 11,000 forward bookings, respectively.

Number of Forward Bookings to Cape Town by Source Market, Jul – Dec 2024

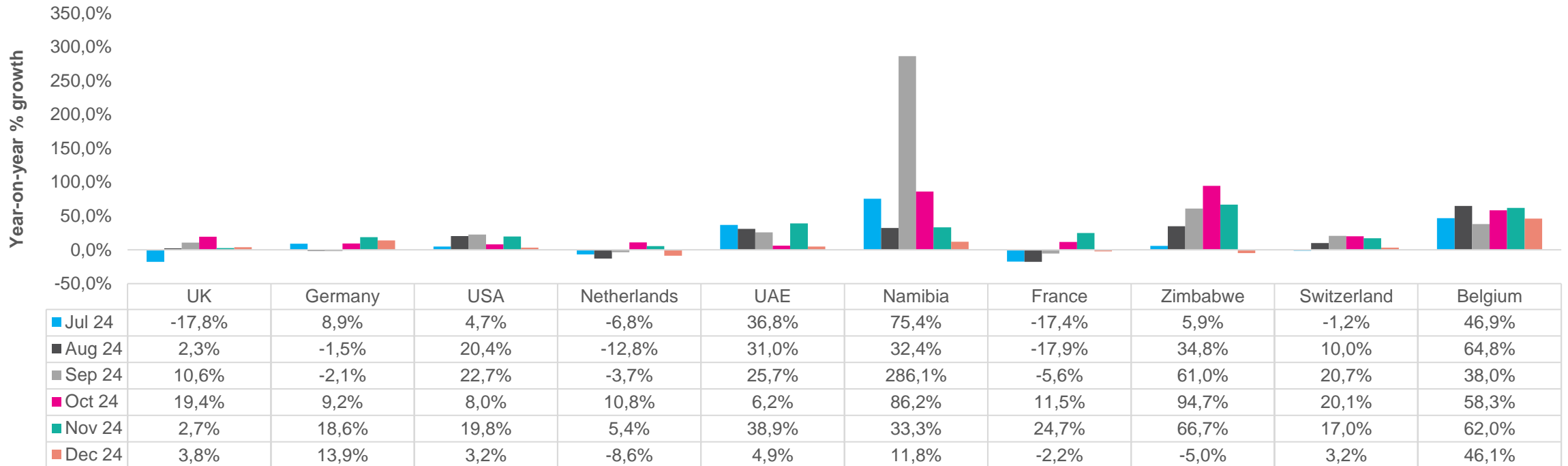


Source: ForwardKeys, 2024

Air Passenger Forward Bookings: Jul – Dec 2024

- Based on ForwardKeys Actual Air Tickets (AAT) data, forward tickets for the period Jul – Dec 2024 indicated that the highest year-on-year (y-o-y) growth in bookings will be from the Namibian source market, reaching a significant 286.1% increase in bookings during September 2024. Amongst the traditional markets, the highest y-o-y growth in UK passengers will be reached during October 2024, while forward bookings from Germany will reach an 18.6% y-o-y increase in November 2024. Bookings from the USA also reflected a significant increase during August and September 2024, with an increase of over 20% respectively, in relation to the same period in 2023.

YoY Growth in Forward Bookings by Source Market, Jul – Dec 2024



Source: ForwardKeys, 2024



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