



Tourism Research Overview June 2024

Cape Town & the Western Cape

WESGRO

cape town & western cape
tourism, trade, investment, film

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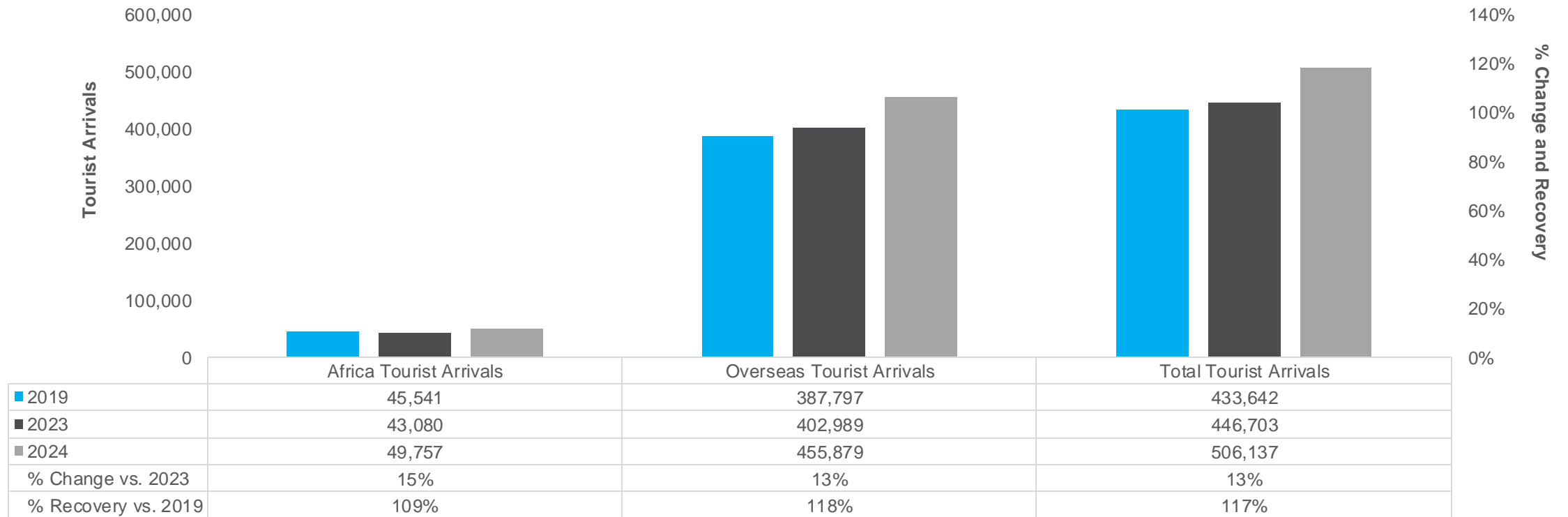
Key Findings

- Tourist arrivals to Cape Town (via air) recorded a 13% year-on-year increase over the period January to June 2024, reaching 506,137 tourists and exceeding the 2019 figure of 433,642 (Jan – Jun). Across the Jan – Jun 2024 period, 90% of air arrivals to Cape Town were from overseas markets and 10% from the rest of Africa. (Source: StatsSA)
- Between Jan and Jun 2024, the UK led as the top overseas air market to Cape Town, with the USA a very close second, followed by Germany, Netherlands and France in the rest of the top 5 positions. The European region maintains a strong presence into the first half of 2024, with 6 out of the top 10 source markets originating from the continent. Overseas air arrivals to Cape Town during the period Jan – Jun 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Jun 2019. These markets include the UK, USA, Germany, Netherlands, Canada, India, Australia and Italy. (Source: StatsSA)
- Between January and June 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 – Jun 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Jun 2019. These markets include Zimbabwe, Kenya, Mozambique, Mauritius, Nigeria, Ghana, Botswana and Tanzania. (Source: StatsSA)
- Cape Town International Airport's **international terminal** saw a 13% year-on-year growth of two-way passenger movements over the period Jan – Jun 2024, with over 1.5 million 2-way passengers moving through the terminal. The **domestic terminal** recorded an 9% year-on-year growth of two-way passenger movements over the period Jan – Jun 2024, with over 3.5 million 2-way passengers passing through the domestic terminal. George Airport recorded 392,608 two-way passengers between Jan and Jun 2024, increasing by 2% in relation to the same period in 2023 (Jan – Jun). (Source: ACSA)
- 50 participating attractions across the six regions of the Western Cape recorded a total of 3,889,040 visitors between Jan and Jun 2024, a 23% growth in the number of visitors compared to Jan – Jun 2023. The top 5 participating Western Cape attractions in terms of volume of visitors were recorded for Table Mountain National Park (1,560,551 visitors), Table Mountain Aerial Cableway (566,995 visitors), Table Mountain National Park: Cape of Good Hope (496,268 visitors), Table Mountain National Park: Boulders (417,324 visitors) and Tsitsikamma National Park (148,405 visitors) between January and June 2024. (Source: Attractions, Local Tourism Offices, SANParks & CapeNature)
- 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. (Source: ForwardKeys)

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

- Tourist arrivals to Cape Town (via air) recorded a 13% year-on-year increase over the period January to June 2024, reaching 506,137 tourists and exceeding the 2019 figure of 433,642 (Jan – Jun). Across the Jan – Jun 2024 period, 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 - Jun 2024

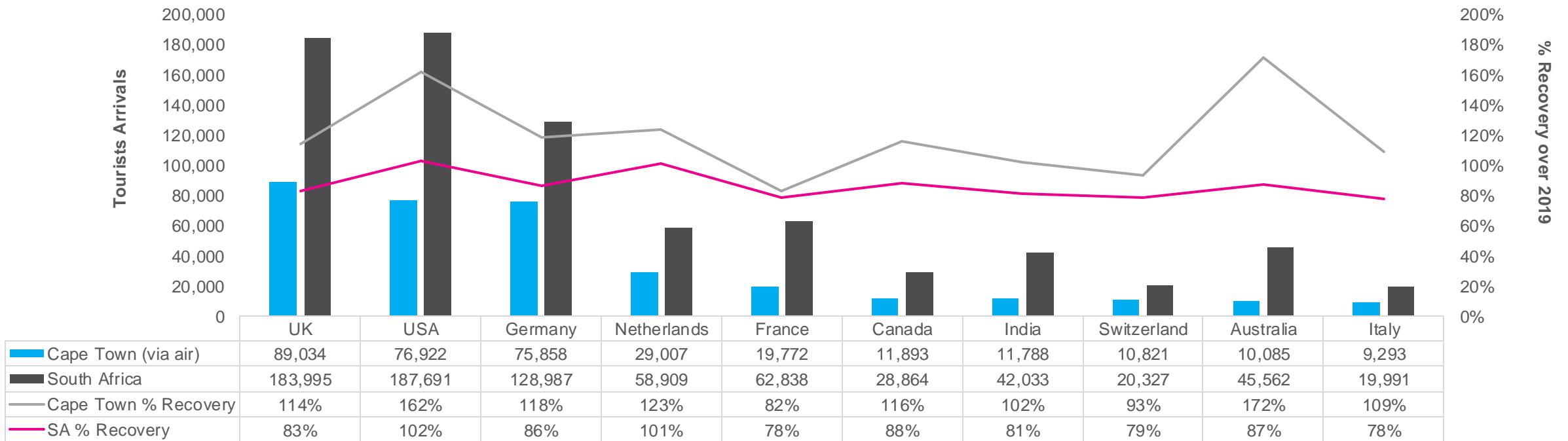


Source: StatsSA, 2024

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

- Between Jan and Jun 2024, the UK led as the top overseas air market to Cape Town, with the USA a very close second, followed by Germany, Netherlands and France in the rest of the top 5 positions. The European region maintained a strong presence into the first half of 2024, with 6 out of the top 10 source markets originating from the continent.
- Overseas air arrivals to Cape Town during the period Jan – Jun 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Jun 2019. These markets include the UK, USA, Germany, Netherlands, Canada, India, Australia and Italy.

Tourist Arrivals to Cape Town (via air) and South Africa, Jan - Jun 2024



Source: StatsSA, 2024

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

- Between January and June 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 – Jun 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Jun 2019. These markets include Zimbabwe, Kenya, Mozambique, Mauritius, Nigeria, Ghana, Botswana and Tanzania.

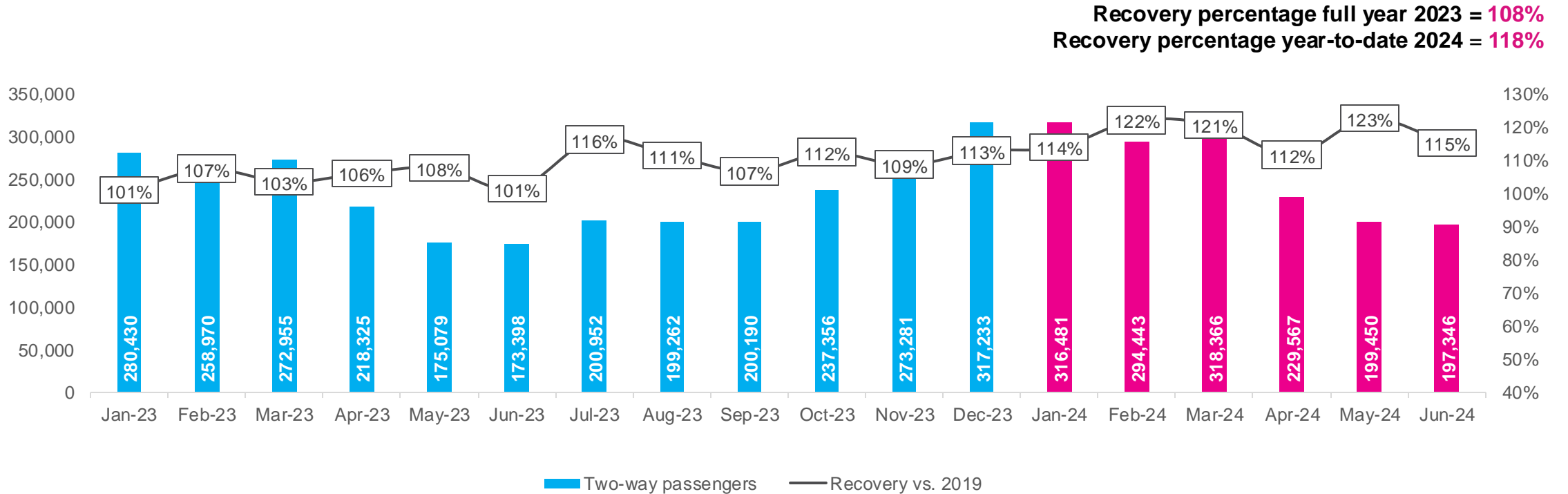
Ranking	The rest of Africa Source Market	Tourists to Cape Town (via air) Jan - Jun 2024	Tourists to South Africa Jan - Jun 2024	Cape Town % Recovery vs. 2019	South Africa % Recovery vs. 2019
1	Namibia	8 997	77 431	73%	84%
2	Zimbabwe	7 261	1 150 304	145%	100%
3	Angola	6 129	18 507	52%	55%
4	Kenya	5 024	21 130	191%	145%
5	Mozambique	3 975	786 425	7950%	115%
6	Mauritius	2 520	8 491	101%	82%
7	Nigeria	2 019	10 740	125%	47%
8	Ghana	1 972	15 674	405%	172%
9	Botswana	1 764	178 891	198%	58%
10	Tanzania	1 691	17 434	177%	96%

Cape Town International Airport (CTIA): International Terminal

Year/Month	2019	2020	2021	2022	2023	2024						2024 ytd
						Jan	Feb	Mar	Apr	May	Jun	
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 807 431	316 481	294 443	318 366	229 567	199 450	197 346	1 555 653
YoY growth percentage*	1%	-69%	-35%	261%	48%	13%	14%	17%	5%	14%	14%	13%

* Growth compared to the same period in the previous year

Passenger data source: ACSA

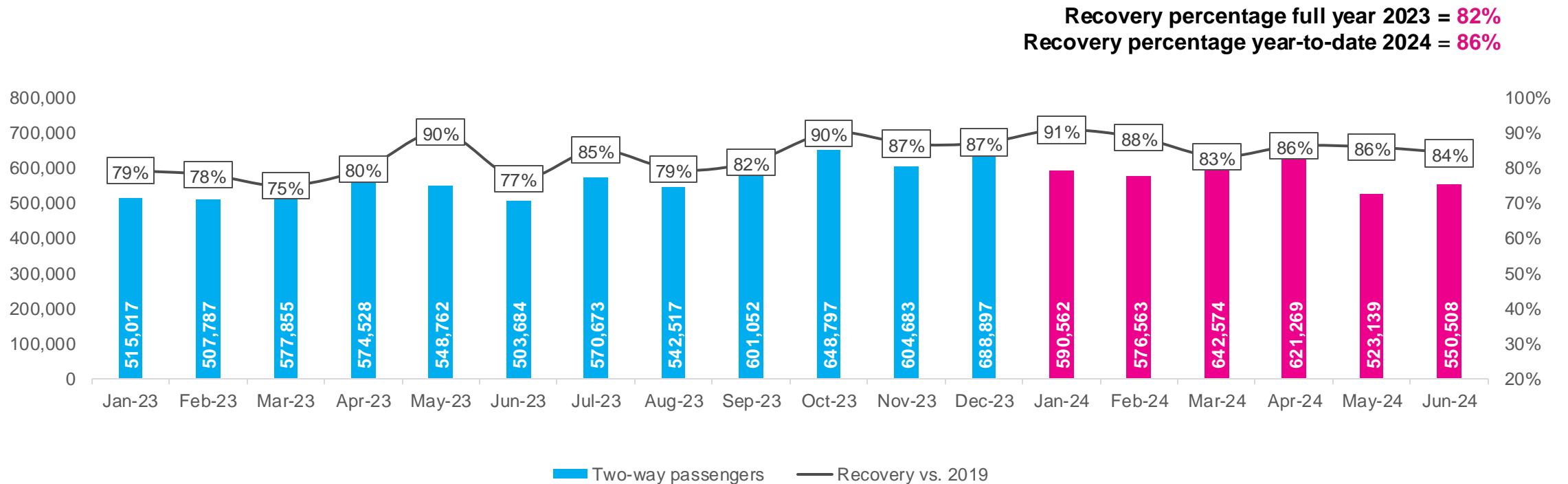


Cape Town International Airport (CTIA): Domestic Terminal

Year/Month	2019	2020	2021	2022	2023	2024						2024 ytd
						Jan	Feb	Mar	Apr	May	Jun	
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 884 252	590 562	576 563	642 574	621 269	523 139	550 508	3 504 615
YoY growth percentage*	2%	-62%	33%	41%	16%	15%	14%	11%	8%	-5%	9%	9%

* Growth compared to the same period in the previous year

Passenger data source: ACSA

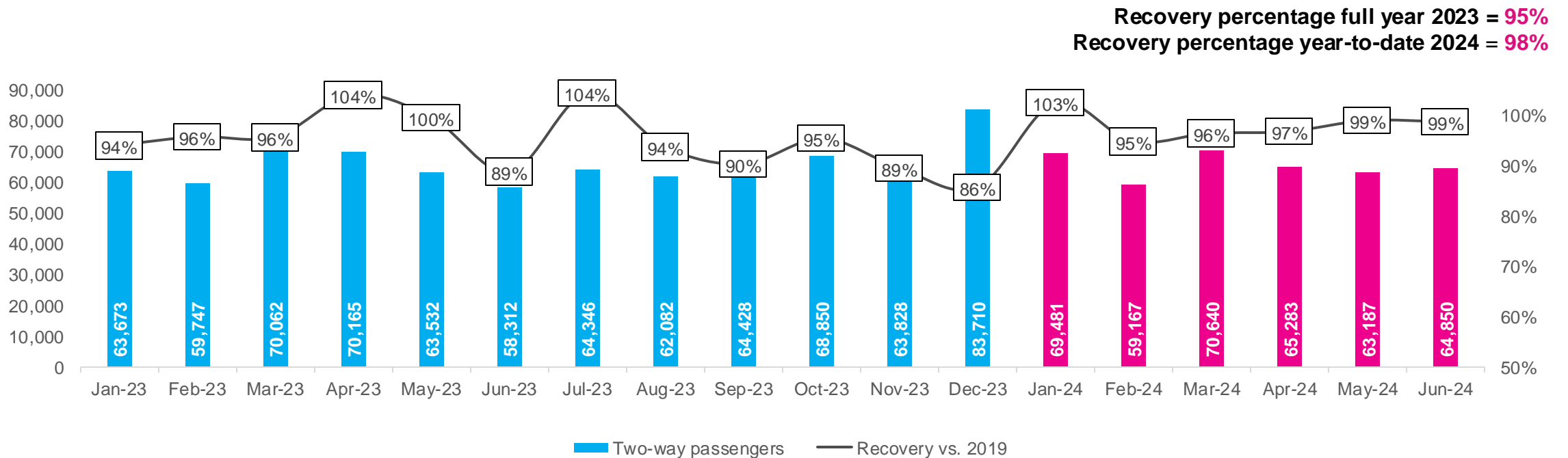


George Airport (GRJ): Passenger performance: Jan – Jun 2024

Year/Month	2019	2020	2021	2022	2023	2024						2024 Ytd
						Jan	Feb	Mar	Apr	May	Jun	
Two-way passengers	840 804	346 223	539 637	747 848	792 735	69 481	59 167	70 640	65 283	63 187	64 850	392 608
YoY growth percentage*	0.5%	-59%	56%	39%	6%	9%	-1%	1%	-7%	-1%	11%	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

	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

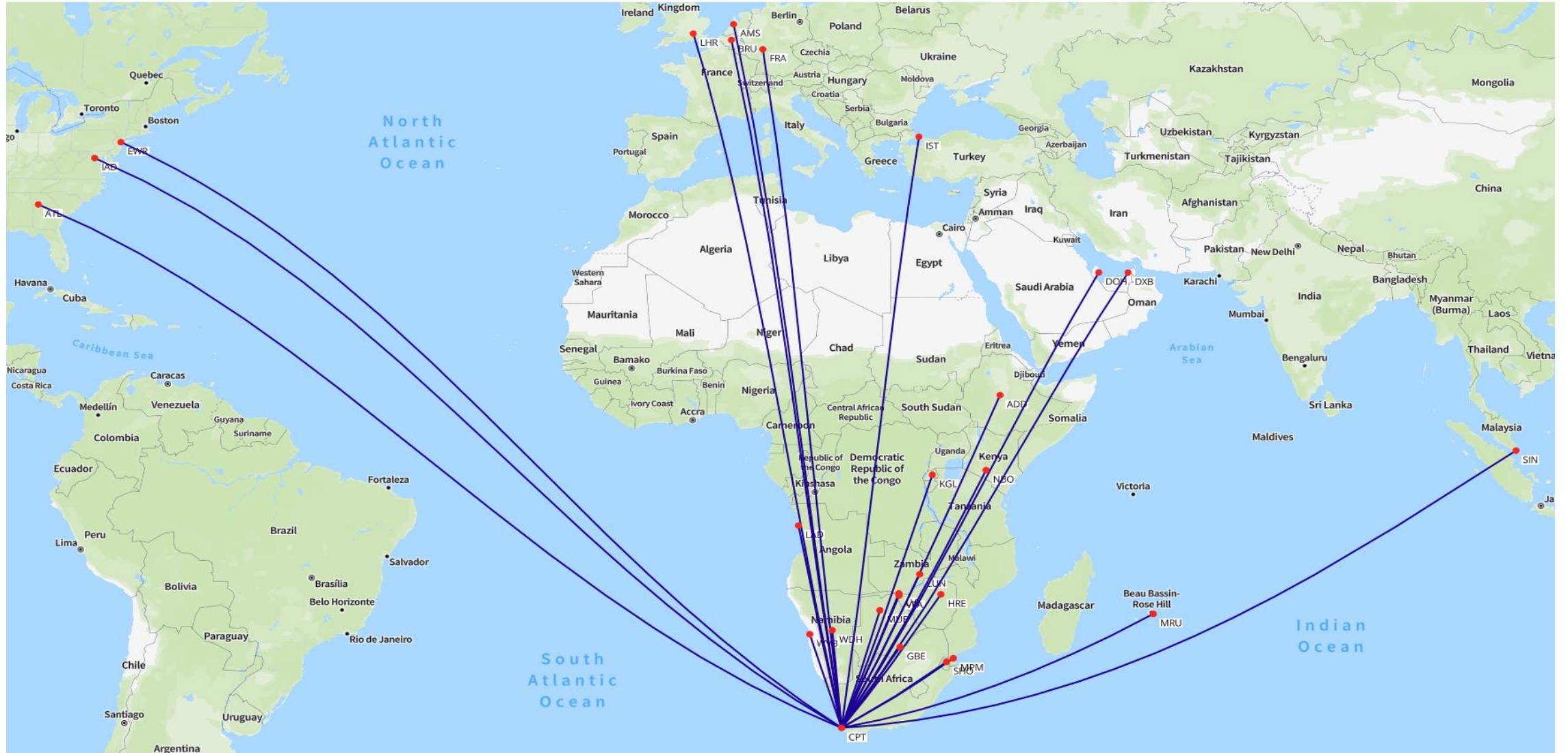
North & South America

	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>

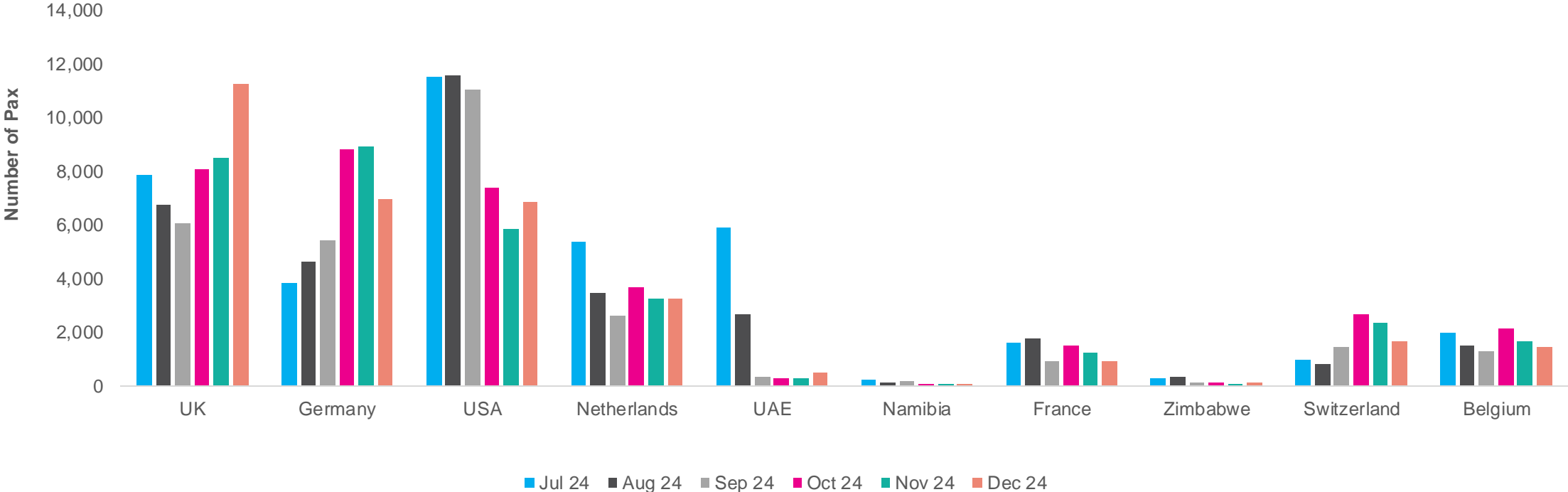
IATA Summer route network (April - October 2024)



Air Passenger Forward Bookings: Jul – Dec 2024

- 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.

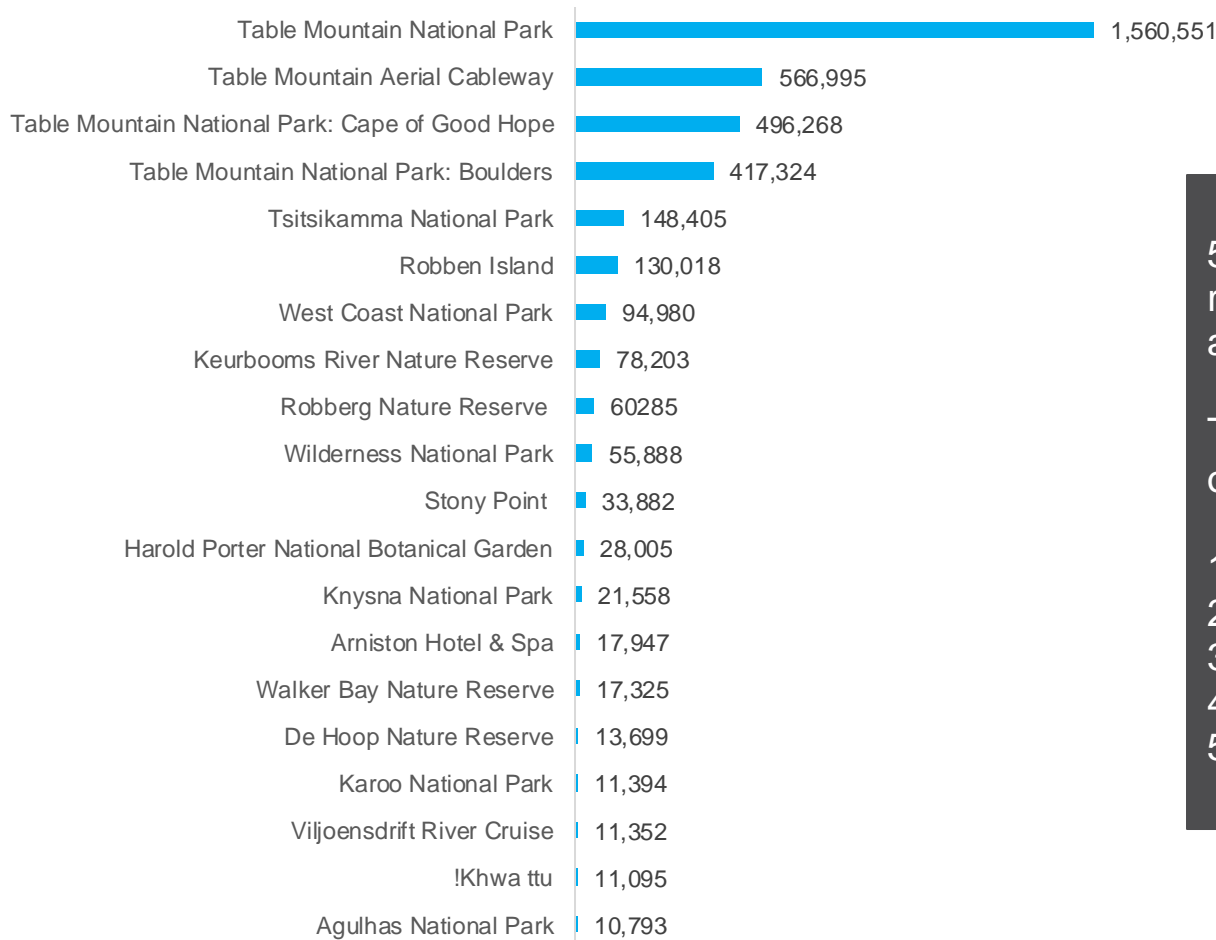
Number of Forward Bookings to Cape Town by Source Market, Jul – Dec 2024



Source: ForwardKeys, 2024

Performance of Western Cape Attractions: Jan–Jun 2024

Top 20 Participating Western Cape Attractions Jan–Jun. 2024



50 participating attractions across the six regions of the Western Cape recorded a total of 3,889,040 visitors between January and June 2024, a 23% growth in the number of visitors compared to January–June 2023.

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

1. Table Mountain National Park (1,560,551 visitors)
2. Table Mountain Aerial Cableway (566,995 visitors)
3. Table Mountain National Park: Cape of Good Hope (496,268 visitors)
4. Table Mountain National Park: Boulders (417,324 visitors)
5. Tsitsikamma National Park (148,405 visitors)

Sources: Attractions, LTOs, CapeNature and SANParks (2024)

Performance of Western Cape Attractions: Jan–Jun 2024

Western Cape Attractions	Jan–Jun 2023	Jan–Jun 2024	Y-o-Y Growth
Cape Town			
Table Mountain National Park	1 279 902	1 560 551	22%
Table Mountain Aerial Cableway	473 249	566 995	20%
Table Mountain National Park: Cape of Good Hope	432 297	496 268	15%
Table Mountain National Park: Boulders	339 657	417 324	23%
Robben Island	114 062	130 018	14%
Total	2 639 167	3 171 156	20%
Overberg			
Stony Point	11 158	33 882	204%
Harold Porter National Botanical Garden	23 439	28 005	19%
Arniston Hotel & Spa	17 251	17 947	4%
Walker Bay Nature Reserve	8 606	17 325	101%
De Hoop Nature Reserve	5 604	13 699	144%
Agulhas National Park	12 322	10 793	-12%
Cape Agulhas Lighthouse	10 833	10 043	-7%
Kogelberg Nature Reserve	3 506	8 186	133%
Bontebok National Park	7 877	7 763	-1%
Grootvadersbosch Nature Reserve	3 981	4 328	9%
Marloth Nature Reserve	3 411	3 752	10%
Shipwreck Museum	1 288	1 451	13%
The Whale Trail	1 628	1 252	-23%
Stony Point Eco Venue	219	591	170%
Grootvadersbosch Eco Venues	819	584	-29%
De Mond Nature Reserve	3 573	460	-87%
Elim Heritage Centre	500	443	-11%
Total	116 015	160 504	38%
Garden Route & Klein Karoo			
Tsitsikamma National Park	120 390	148 405	23%
Keurbooms River Nature Reserve	39 738	78 203	97%
Robberg Nature Reserve	44 579	60 285	35%
Wildemess National Park	46 716	55 888	20%
Knysna National Park	16 429	21 558	31%
Goukamma Nature Reserve	1 027	1 047	2%
Total	268 879	365 386	36%

Weskus	Jan–Jun 2023	Jan–Jun 2024	Y-o-Y Growth
West Coast National Park	55 830	94 980	70%
!Khwa ttu	10 210	11 095	9%
Cederberg-Algeria Nature Reserve	7 031	8 709	24%
Matjiesrivier Nature Reserve	6 916	6 739	-3%
Bird Island Nature Reserve	4 313	5 541	28%
Groot Winterhoek Wildemess Area	1 813	2 082	15%
Cederberg-Kliphuis Nature Reserve	750	1 538	105%
Rocherpan Nature Reserve	884	912	3%
Total	87 747	131 596	50%
Cape Winelands			
Viljoensdrift River Cruise	7 375	11 352	54%
Limietberg Nature Reserve	11 332	9 653	-15%
Avalon Springs	4 373	7 413	70%
Jonkershoek Nature Reserve	3 725	4 995	34%
Birds Paradise	3 110	4 552	46%
Vrolijkheid Nature Reserve	3 077	3 306	7%
Hottentots Holland Nature Reserve	1 691	2 229	32%
Protea Tractor Trip	1 973	1 896	-4%
Assegaaibosch Nature Reserve	665	1 385	108%
Vrolijkheid Eco Venue	318	409	29%
Total	37 639	47 190	25%
Cape Karoo			
Karoo National Park	15 348	11 394	-26%
Gamkaberg Nature Reserve	798	1 035	30%
Anysberg Nature Reserve	294	620	111%
Swartberg Nature Reserve	67	159	137%
Total	16 507	13 208	-20%
Total for all attractions (Jan–Jun 2023 & Jan–Jun 2024)	3 165 954	3 889 040	23%



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