



# Tourism Research Overview March 2024

Cape Town & the Western Cape

**WESGRO**

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

An Inspiring Place To Do Business

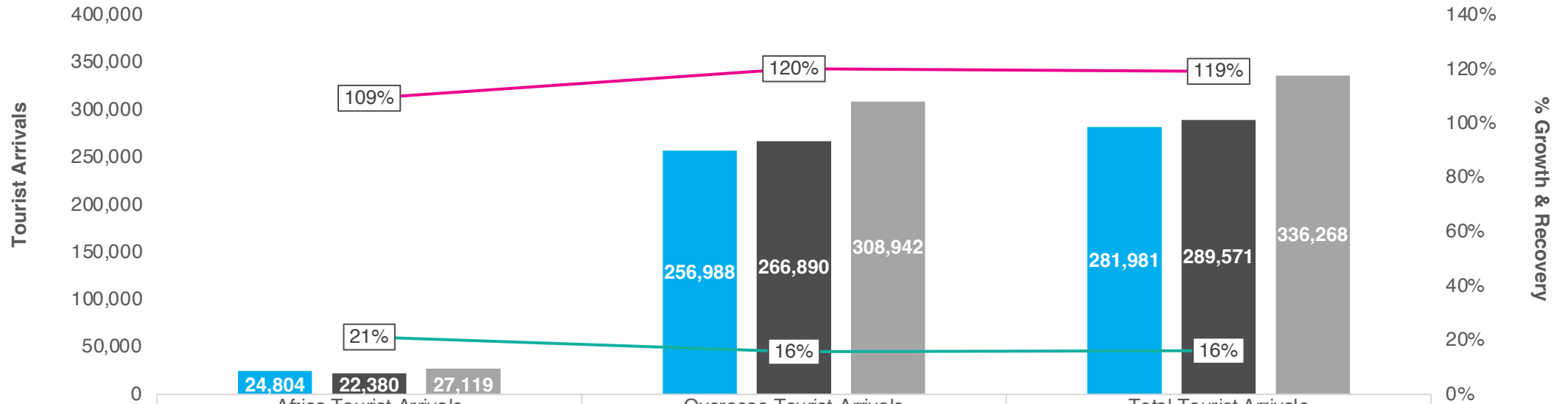
# Key Findings

- Tourist arrivals to Cape Town (via air) recorded a 16% year-on-year increase over the period January to March 2024, reaching 336,268 tourists and exceeding the 2019 figure of 281,981 (Jan – Mar). In Q1 (Jan – Mar) 2024, 92% of air arrivals to Cape Town were from overseas markets and 8% were from the rest of Africa. (Source: StatsSA)
- Between January and March 2024, UK led as the top overseas air market to Cape Town, with Germany a very close second, followed by USA, Netherlands and France in the rest of the top 5 positions. The first quarter of 2024 showed a strong European presence, with 8 out of the top 10 source markets originating from the continent. Overseas air arrivals to Cape Town during the period Jan – Mar 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan – Mar 2019. These markets included the UK, Germany, USA, Netherlands, Canada, Belgium and Ireland. (Source: StatsSA)
- Between January and March 2024, Namibia led as the top air market from the rest of Africa to Cape Town, with Zimbabwe in a very close second position. Angola, Mozambique and Kenya followed in the rest of the top 5 positions. Air arrivals to Cape Town from the rest of Africa during the period Jan – Mar 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Mar 2019. These markets included Zimbabwe, Mozambique, Kenya, Mauritius, Nigeria, Botswana, Tanzania and Ghana. (Source: StatsSA)
- CTIA's international terminal saw a 17% year-on-year two-way passenger growth in March 2024, with 318,366 two-way passengers, reflecting an even stronger growth rate on the back of a 13% increase recorded in January 2024 and 14% in February 2024. The domestic terminal recorded a 11% year-on-year two-way passenger growth in March 2024, with over 640 000 two-way passengers passing through the terminal. George Airport recorded 70,640 two-way passengers in March 2024 and in relation to 2019, the year-to-date passenger movement between January and March 2024 recovered by 98%. (Source: ACSA)
- 53 participating attractions across the six regions of the Western Cape recorded a total of 2,587,808 visitors between January and March 2024, a 23% growth in the number of visitors when compared to January – March 2023. The top 5 participating Western Cape attractions with the highest volume of visitors between January and March 2024 were recorded for: Table Mountain National Park (951,767), Table Mountain Aerial Cableway (346,277), Table Mountain National Park: Cape of Good Hope (299,392), Table Mountain National Park: Boulders (256 098) and Kirstenbosch National Botanical Garden (205 207). The top 5 highest year-on-year growth rates between January and March 2024 were recorded amongst the Western Cape's nature/outdoor attractions: Vrolijkheid Eco Venue (782%), Avalon Springs (400%), Stony Point Eco Venue (351%), Swartberg Nature Reserve (200%) and De Hoop Nature Reserve (185%) (Source: Western Cape Attractions & LTOs)
- The Tourism Sentiment Index in Q4 2023 showed that the biggest volume of online conversations about the Western Cape was around Restaurants & Dining. The highest sentiment was for Beaches (42), followed by Restaurants & Dining (32) and Winery & Vineyards (29). (Source: Tourism Sentiment Index, TSI)

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

- Tourist arrivals to Cape Town (via air) recorded a 16% year-on-year increase over the period January to March 2024, reaching 336,268 tourists and exceeding the 2019 figure of 281,981 (Jan – Mar). In Q1 (Jan – Mar) 2024, 92% of air arrivals to Cape Town were from overseas markets and 8% were from the rest of Africa.

Tourist Arrivals to Cape Town (via air) by Origin, Jan – Mar 2024



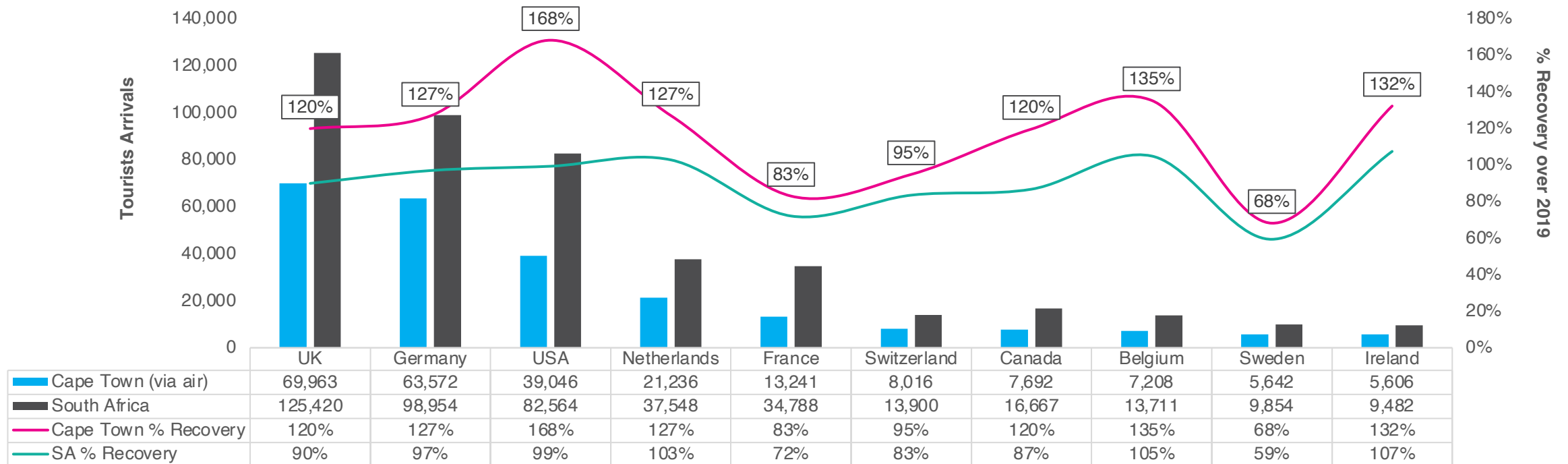
	Africa Tourist Arrivals	Overseas Tourist Arrivals	Total Tourist Arrivals
2019	24,804	256,988	281,981
2023	22,380	266,890	289,571
2024	27,119	308,942	336,268
% Change vs. 2023	21%	16%	16%
% Recovery vs. 2019	109%	120%	119%

Source: StatsSA, 2024

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

- Between January and March 2024, UK led as the top overseas air market to Cape Town, with Germany a very close second, followed by USA, Netherlands and France in the rest of the top 5 positions. The first quarter of 2024 showed a strong European presence, with 8 out of the top 10 source markets originating from the continent.
- Overseas air arrivals to Cape Town during the period Jan – Mar 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan – Mar 2019. These markets included the UK (120%), Germany (127%), USA (168%), Netherlands (127%), Canada (120%), Belgium (135%) and Ireland (132%).

**Tourist Arrivals to Cape Town (via air) and South Africa, Jan – Mar 2024**



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

- Between January and March 2024, Namibia led as the top air market from the rest of Africa to Cape Town, with Zimbabwe in a very close second position. Angola, Mozambique and Kenya followed in the rest of the top 5 positions.
- Air arrivals to Cape Town from the rest of Africa during the period Jan – Mar 2024 reflected full recovery from 8 out of the top 10 source markets to Cape Town vs. Jan – Mar 2019. These markets included Zimbabwe, Mozambique, Kenya, Mauritius, Nigeria, Botswana, Tanzania and Ghana.

Ranking	Africa Source Market	Tourists to Cape Town (via air) Jan - Mar 2024	Tourists to South Africa Jan - Mar 2024	Cape Town % Recovery vs. 2019	South Africa % Recovery vs. 2019
1	Namibia	4 333	39 112	67%	87%
2	Zimbabwe	4 001	613 675	145%	99%
3	Angola	3 462	9 887	48%	50%
4	Mozambique	2 838	415 042	13514%	112%
5	Kenya	2 752	10 229	219%	140%
6	Mauritius	1 493	4 216	114%	81%
7	Nigeria	1 063	5 695	134%	50%
8	Botswana	978	90 761	338%	69%
9	Tanzania	963	8 489	201%	93%
10	Ghana	927	7 904	366%	162%

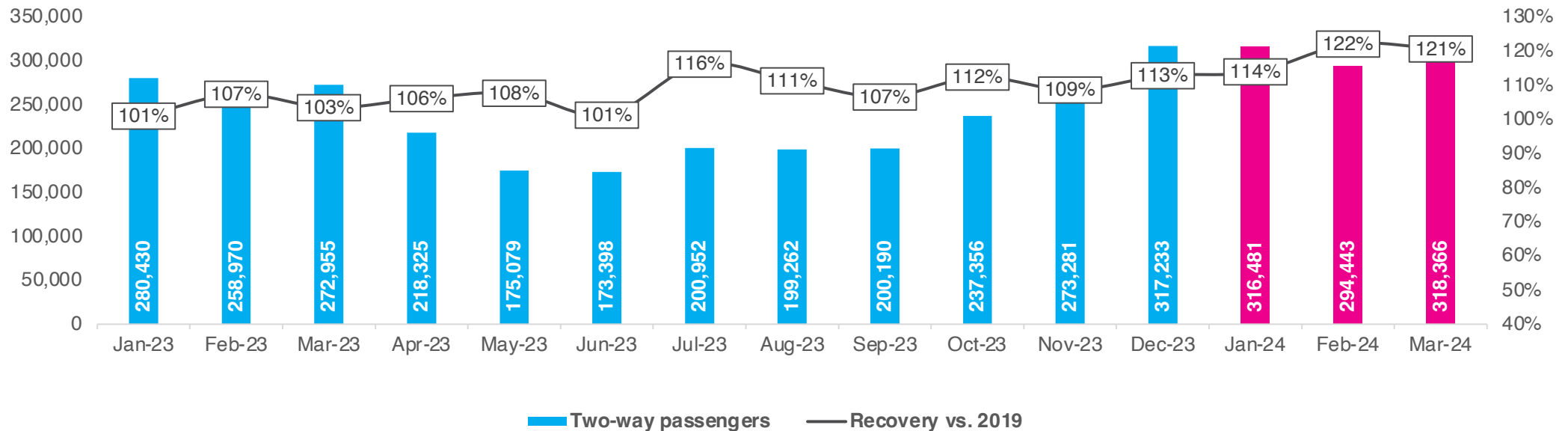
# Cape Town International Airport (CTIA): International Terminal

Year/Month	2019	2020	2021	2022	2023	2023			2024			2024 ytd
						Oct	Nov	Dec	Jan	Feb	Mar	
Two-way passengers	2 606 398	810 811	525 441	1 895 975	2 807 431	237 356	273 281	317 233	316 481	294 443	318 366	929 290
YoY growth percentage*	1%	-69%	-35%	261%	48%	35%	29%	17%	13%	14%	17%	14%

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

Passenger data source: ACSA

Recovery percentage full year 2023 = **108%**  
 Recovery percentage year-to-date 2024 = **119%**



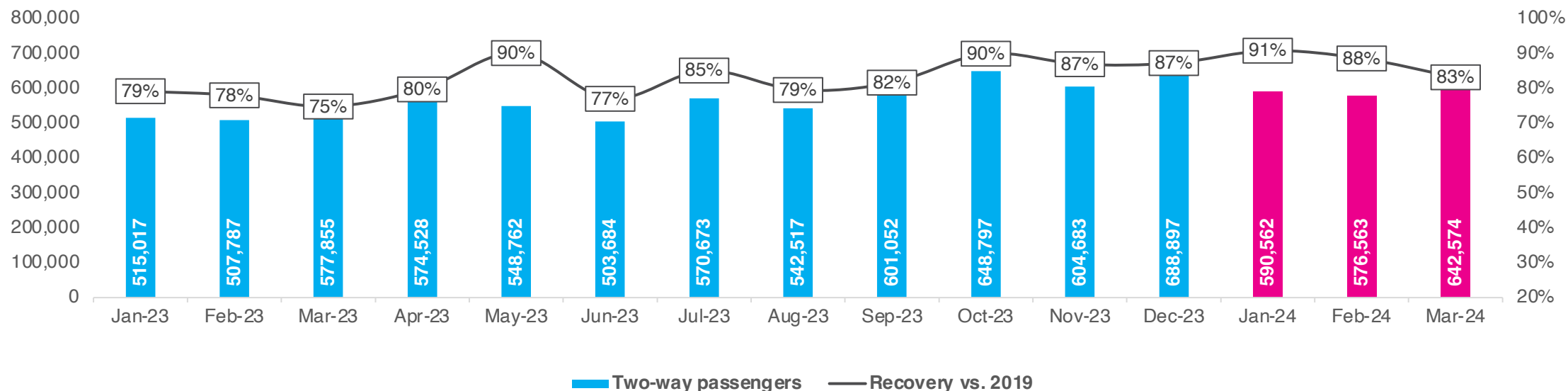
# Cape Town International Airport (CTIA): Domestic Terminal

Year/Month	2019	2020	2021	2022	2023	2023			2024			2024 ytd
						Oct	Nov	Dec	Jan	Feb	Mar	
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	6 884 252	648 797	604 683	688 897	590 562	576 563	642 574	1 809 699
YoY growth percentage*	2%	-62%	33%	41%	16%	23%	19%	21%	15%	14%	11%	13%

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

Passenger data source: ACSA

**Recovery percentage full year 2023 = 82%**  
**Recovery percentage year-to-date 2024 = 87%**



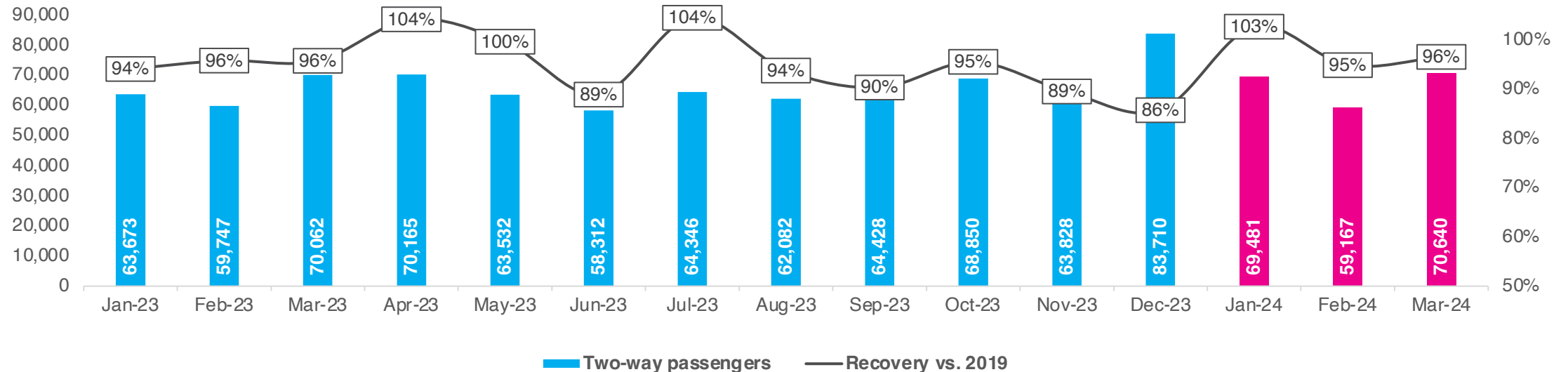
# George Airport (GRJ) passenger performance: March 2024

Year/Month	2019	2020	2021	2022	2023	2023			2024			2024 Ytd
						Oct	Nov	Dec	Jan	Feb	Mar	
Two-way passengers	840 804	346 223	539 637	747 848	792 735	68 850	63 828	83 710	69 481	59 167	70 640	199 288
YoY change percentage*	0.5%	-59%	56%	39%	6%	7%	7%	31%	9%	-1%	1%	3%

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

Data source: ACSA

**Recovery percentage full year 2023 = 95%**  
**Recovery percentage year-to-date 2024 = 98%**






















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

## 23 airlines, 27 destinations & 175 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
	<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)   6x week
	<b>TAAG</b>	Luanda (LAD)   Daily


### Europe

	<b>British Airways</b>	London Heathrow (LHR)   Daily
	<b>Condor</b>	Frankfurt (FRA)*   5x per week <i>* Until Mid-April</i>
	<b>Edelweiss</b>	Zurich (ZRH)*   4x per week <i>*Until 1 May 2024</i>
	<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)   10x per week
	<b>Singapore Airlines</b>	Singapore (SIN)*   Daily <i>*SIN-JNB-CPT-JNB-SIN</i>

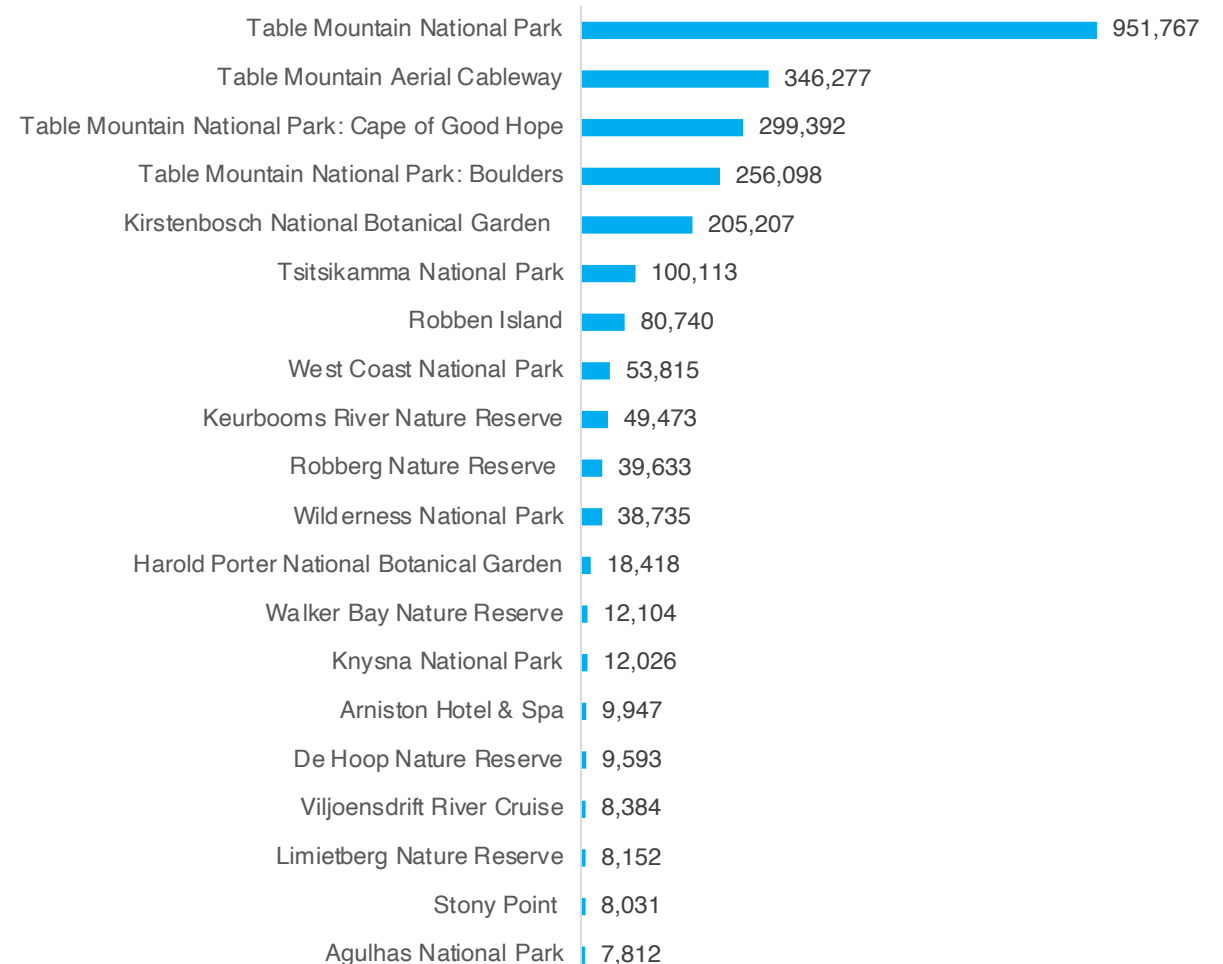
Data Source: Cape Town Air Access



# Performance of Western Cape Attractions, Jan – Mar 2024

- 53 participating attractions across the six regions of the Western Cape recorded a total of 2,587,808 visitors between January and March 2024, a 23% growth in the number of visitors when compared to January – March 2023.
- The top 5 participating Western Cape attractions with the highest volume of visitors between January and March 2024 were recorded for:
  1. Table Mountain National Park (951,767)
  2. Table Mountain Aerial Cableway (346,277)
  3. Table Mountain National Park: Cape of Good Hope (299,392)
  4. Table Mountain National Park: Boulders (256,098)
  5. Kirstenbosch National Botanical Garden (205,207)
- The top 5 highest year-on-year growth rates for the period January to March 2024 were recorded amongst the Western Cape’s nature/outdoor attractions:
  1. Vrolijkheid Eco Venue (782%)
  2. Avalon Springs (400%)
  3. Stony Point Eco Venue (351%)
  4. Swartberg Nature Reserve (200%)
  5. De Hoop Nature Reserve (185%)

**Top 20 Participating Western Cape Attractions Jan–Mar 2024**



Sources: Western Cape Attractions & LTOs, 2024

# Performance of Western Cape Attractions, Jan – Mar 2024

## Continued...

Western Cape Attractions	Q1 2023	Q1 2024	Q1 2023 / Q1 2024 % Change
<b>Cape Town</b>			
Table Mountain National Park	758 389	951 767	25%
Table Mountain Aerial Cableway	279 263	346 277	24%
Table Mountain National Park: Cape of Good Hope	252 157	299 392	19%
Table Mountain National Park: Boulders	200 691	256 098	28%
Kirstenbosch National Botanical Garden	204 628	205 207	0%
Robben Island	71 290	80 740	13%
<b>Total</b>	<b>1,766,418</b>	<b>2,139,481</b>	<b>21%</b>
<b>Overberg</b>			
Harold Porter National Botanical Garden	13 933	18 418	32%
Walker Bay Nature Reserve	5 746	12 104	111%
Arniston Hotel & Spa	9 212	9 947	8%
De Hoop Nature Reserve	3 361	9 593	185%
Stony Point	7 223	8 031	11%
Agulhas National Park	8 228	7 812	-5%
Cape Agulhas Lighthouse	6 142	6 827	11%
Bontebok National Park	4 537	5 058	11%
Kogelberg Nature Reserve	2 196	4 812	119%
Grootvadersbosch Nature Reserve	2 079	2 606	25%
Marloth Nature Reserve	2 053	2 394	17%
Shipwreck Museum	738	899	22%
Panthera Africa	811	744	-8%
The Whale Trail	636	646	2%
Stony Point Eco Venue	70	316	351%
Elim Heritage Centre	309	268	-13%
Grootvadersbosch Eco Venues	212	261	23%
De Mond Nature Reserve	2 616	0	-100%
<b>Total</b>	<b>70,102</b>	<b>90,736</b>	<b>29%</b>
<b>Garden Route &amp; Klein Karoo</b>			
Tsitsikamma National Park	76 175	100 113	31%
Keurbooms River Nature Reserve	31 463	49 473	57%
Robberg Nature Reserve	28 284	39 633	40%
Wilderness National Park	30 995	38 735	25%
Knysna National Park	9 569	12 026	26%
Goukamma Nature Reserve	689	631	-8%
Outeniqua Nature Reserve	3	2	-33%
<b>Total</b>	<b>177,178</b>	<b>240,613</b>	<b>36%</b>

Weskus	Q1 2023	Q1 2024	Q1 2023 / Q1 2024 % Change
<b>West Coast National Park</b>			
West Coast National Park	40 577	53 815	33%
Khwattu	5 552	6 195	12%
Cederberg-Algeria Nature Reserve	3 846	5 708	48%
Matjiesrivier Nature Reserve	2 675	4 858	82%
Bird Island Nature Reserve	2 873	3 828	33%
Groot Winterhoek Wilderness Area	1 214	1 657	36%
Cederberg-Kliphuis Nature Reserve	433	557	29%
Rocherpan Nature Reserve	497	494	-1%
<b>Total</b>	<b>57,667</b>	<b>77,112</b>	<b>34%</b>
<b>Cape Winelands</b>			
Viljoensdrift River Cruise	4 548	8 384	84%
Limietberg Nature Reserve	9 202	8 152	-11%
Avalon Springs	910	4 547	400%
Birds Paradise	1 412	2 908	106%
Jonkershoek Nature Reserve	3 725	2 224	-40%
Vrolijkheid Nature Reserve	1 700	1 737	2%
Hottentots Holland Nature Reserve	1 104	1 415	28%
Protea Tractor Trip	998	1 239	24%
Assegaaibosch Nature Reserve	625	1 106	77%
Vrolijkheid Eco Venue	22	194	782%
<b>Total</b>	<b>24,246</b>	<b>31,906</b>	<b>32%</b>
<b>Cape Karoo</b>			
Karoo National Park	6 946	7 062	2%
Gamkaberg Nature Reserve	253	565	123%
Anysberg Nature Reserve	96	231	141%
Swartberg Nature Reserve	34	102	200%
<b>Total</b>	<b>7 329</b>	<b>7 960</b>	<b>9%</b>
<b>Total for all Attraction in Q1 2023 &amp; Q1 2024</b>	<b>2,102,940</b>	<b>2,587,808</b>	<b>23%</b>

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

Sources: Western Cape Attractions & LTOs 2024

# Visitor Trends Mobile Location Data Insights

## Jan – Mar 2024

**WESGRO**

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# Western Cape Mobile Location Data Insights

## 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

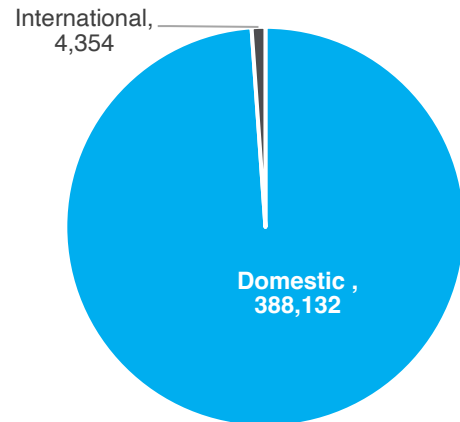
- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

*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.*

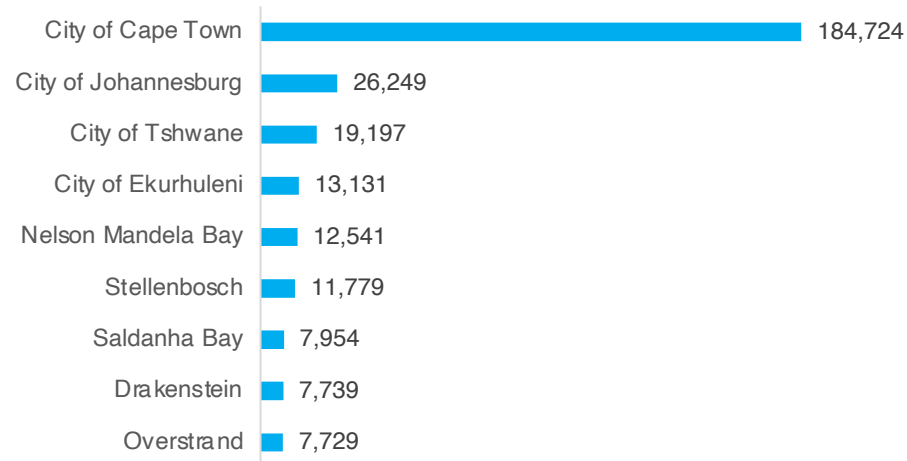
# Western Cape Mobile Location Data Insights

- The insights in this report represent mobile location data from a sample of 388,132 domestic and 4,354 international tourists who visited the Western Cape between January and March 2024.
- Within the domestic data set, 184,724 of the sampled tourists were from Cape Town, 26,249 from the City of Johannesburg, 19,197 from the City of Tshwane, 13,131 from the City of Ekurhuleni, and 12,541 from Nelson Mandela Bay.
- Among the international sampled tourists, 1,182 were from the United States, 528 were from Australia, 449 were from Brazil, 301 were from Mexico, and 250 were from Canada.

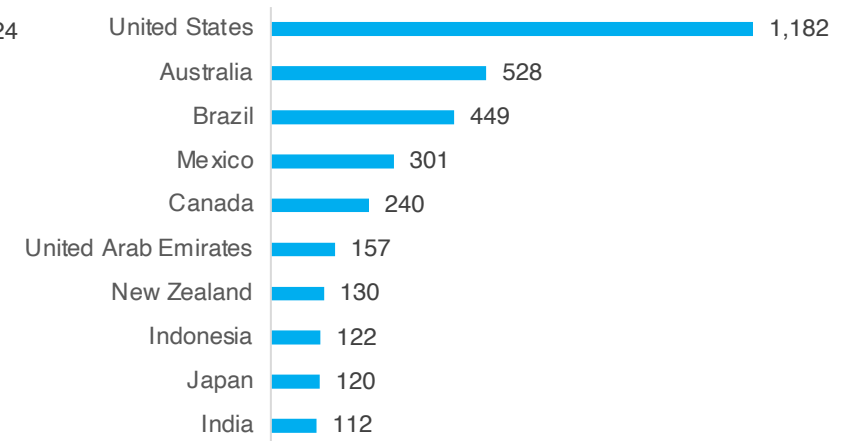
Sample Size, Jan–Mar. 2024



Domestic Origin Municipality, Jan–Mar. 2024



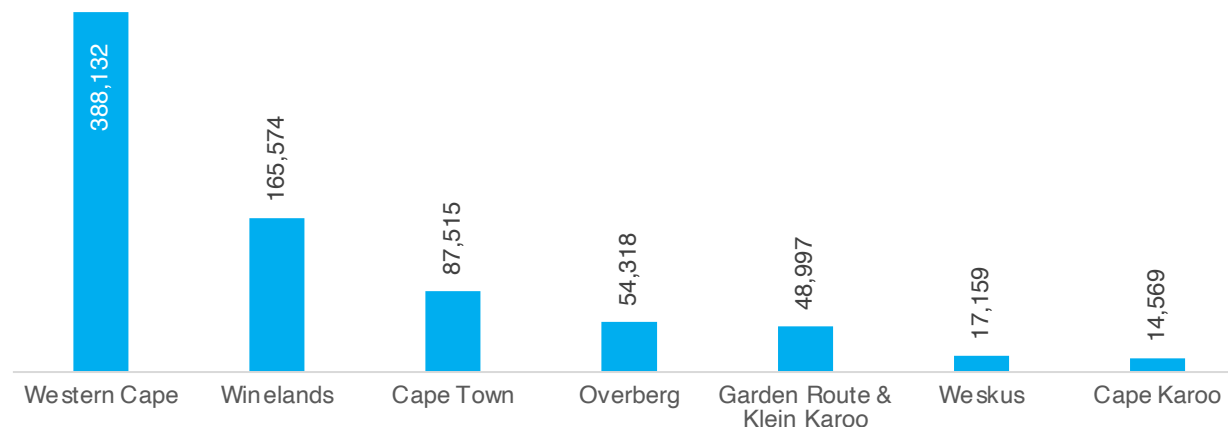
International Origin Country, Jan–Mar. 2024



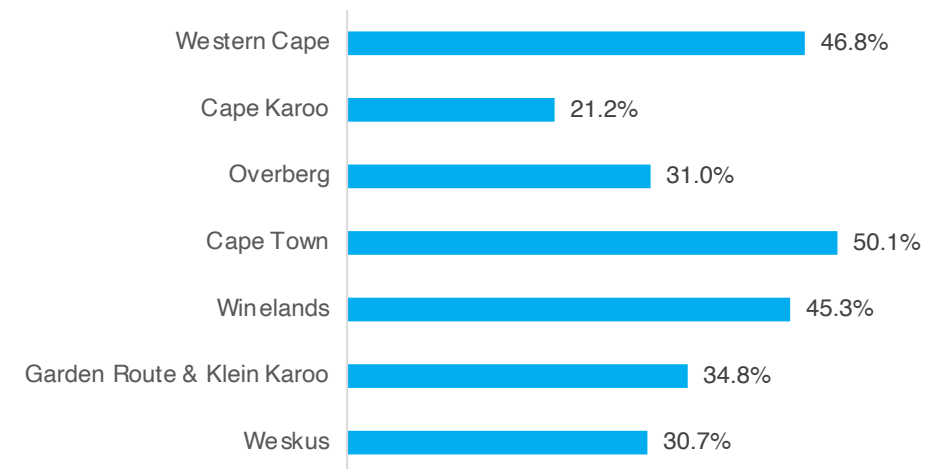
# Mobile Insights: Domestic Visitor Trends

- Based on the latest mobile data insights, between January and March 2024, the Western Cape province experienced a significant increase in visitors, with a total of 388,132 tourists. Out of this number, 46.8% of visitors returned for another visit.
- The most popular destinations within the province during this period were the Winelands, Cape Town, Overberg, and Garden Route & Klein Karoo, with 165,574, 87,515, 54,318, and 48,997 domestic tourists, respectively. However, the Weskus and Cape Karoo regions received less than 20 thousand visitors, with only 17,159 and 14,569 visitors respectively during the same period.
- Further analysis of the mobile data insights reveals that domestic tourists tended to favor certain regions for repeat visits between January and March 2024. Cape Town emerged as the most popular region for domestic repeat visits, with 50.1% of visitors choosing to return to the city in the past three months.
- Winelands proved to be the second most popular destination for repeat visits, with 45.3% of tourists choosing to return. The Garden Route & Klein Karoo (34.8%), Overberg (31.0%) and Weskus (30.7%) regions also proved to be popular among domestic tourists for repeat visits.

Domestic Sample Size, Jan-Mar. 2024



Domestic Repeat Visitors, Jan-Mar. 2024

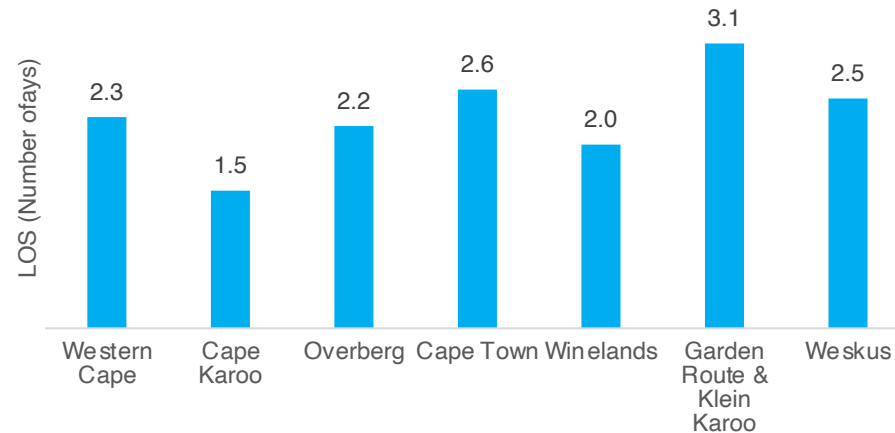




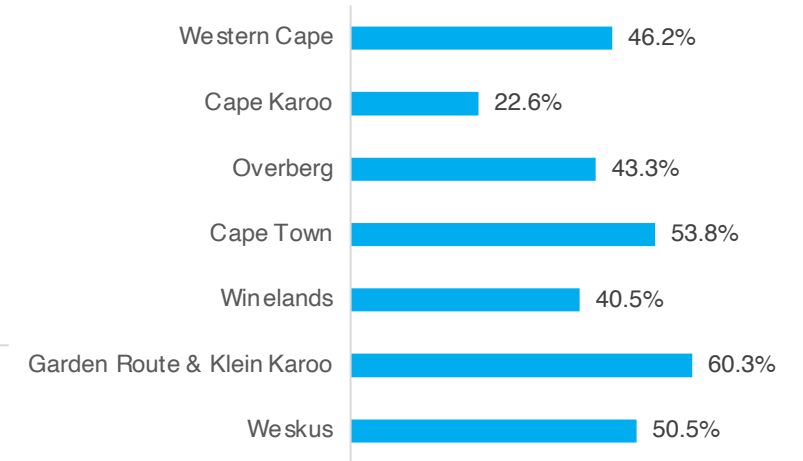
# Mobile Insights: Domestic Visitor Trends

- According to the latest mobile data insights, it has been observed that domestic tourists who visit the Western Cape tend to spend the longest time in some of the most popular tourist destinations. The top three destinations where the average tourist stay duration is maximum are the Garden Route & Klein Karoo (3.1 days), Cape Town (2.6 days), and Weskus (2.5 days).
- Interestingly, the mobile data insights reveal that 60.3% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo and just over 50% choose Cape Town and Weskus as their preferred destinations for overnight stay.
- On the other hand, the mobile data insights show that only 72.2% of domestic tourists visited the Cape Karoo for just one day between January and March 2024.
- It's worth noting that the overnight stay is defined as tourists who arrive before midnight and stay until 07:00 the following day.

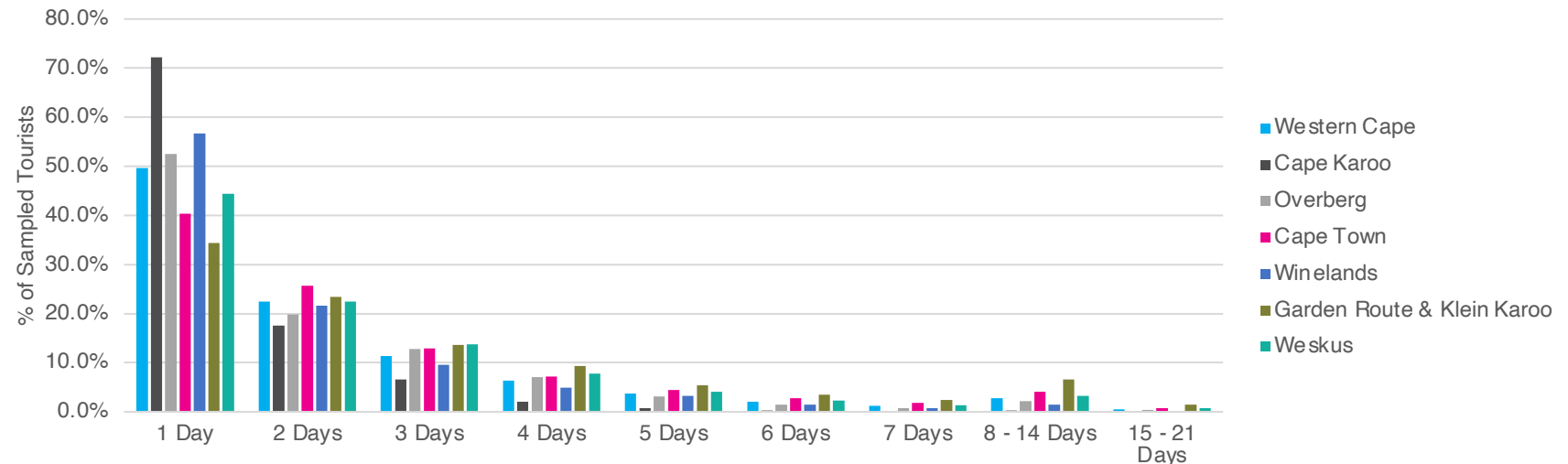
Average Length of Stay (LOS), Jan-Mar. 2024



% Overnight Stays, Jan-Mar. 2024



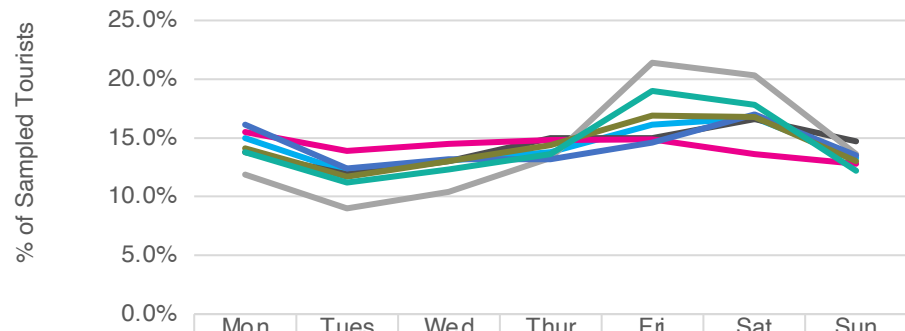
Average Length of Stay (Number of Days): Domestic, Jan-Mar. 2024



# Mobile Insights: Domestic Visitor Trends

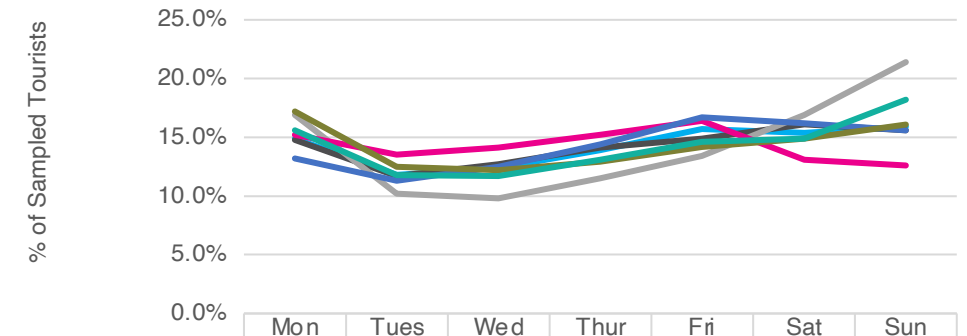
- After analysing the mobile data between January and March 2024, it was observed that the Western Cape province is a popular destination for domestic tourists. The majority of tourists arrive and depart on weekends, particularly Fridays and Saturdays.
- The findings revealed different trends regarding the day of arrival and departure among visitors to various parts of the province. For instance, tourists heading to the Cape Karoo region mostly arrived and departed on a Saturday. While in the Overberg region, tourists mostly arrived on a Friday and departed on a Sunday.
- Tourists visiting Cape Town, on the other hand, arrived on a Monday and departed from the city on Friday. Conversely, tourists to the Winelands arrived on a Saturday and departed on either Friday or Saturday. Tourists to the Garden Route and Klein Karoo region mostly arrived on a Friday or Saturday and departed on a Sunday or Monday. Lastly, tourists to Weskus mostly arrived on a Friday and departed on a Sunday.

Popular Arrival Days of the Week: Domestic, Jan-Mar. 2024



Western Cape	15.0%	12.1%	13.1%	13.8%	16.1%	16.7%	13.3%
Cape Karoo	13.8%	11.9%	13.0%	15.0%	15.0%	16.6%	14.7%
Overberg	11.9%	9.0%	10.4%	13.3%	21.4%	20.3%	13.6%
Cape Town	15.5%	13.9%	14.5%	14.8%	14.9%	13.6%	12.8%
Winelands	16.1%	12.4%	13.2%	13.2%	14.6%	17.0%	13.5%
Garden Route & Klein Karoo	14.1%	11.7%	13.0%	14.4%	16.9%	16.8%	13.0%
Weskus	13.8%	11.2%	12.3%	13.6%	19.0%	17.8%	12.2%

Popular Departure Days of the Week: Domestic, Jan-Mar. 2024

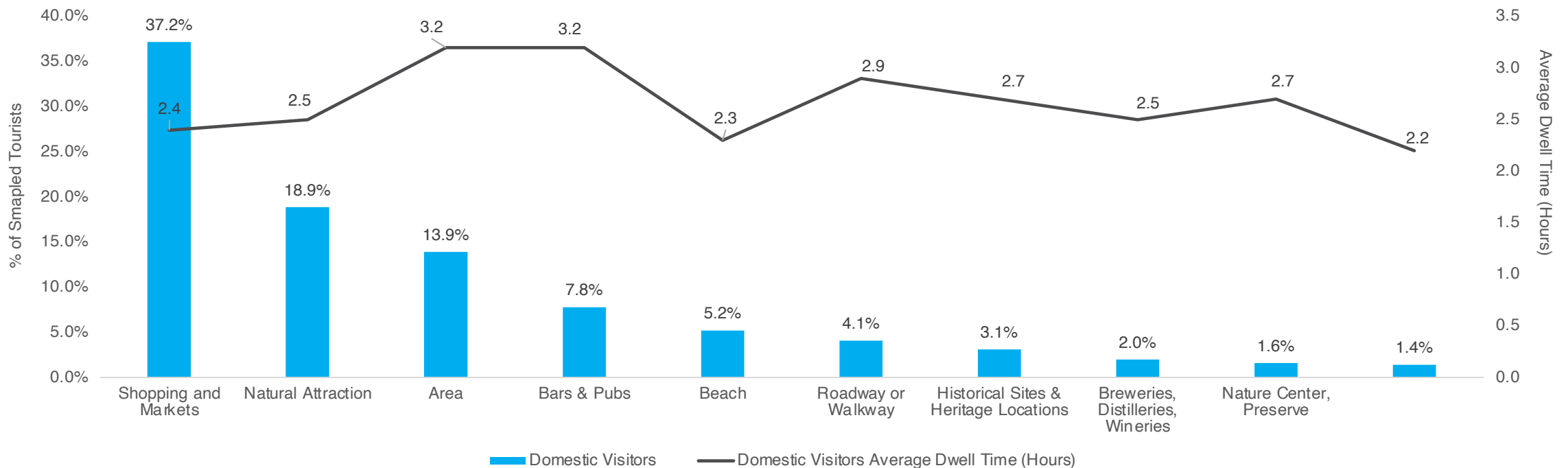


Western Cape	14.9%	11.8%	12.4%	13.9%	15.7%	15.4%	15.9%
Cape Karoo	14.8%	11.7%	12.7%	14.1%	14.9%	16.1%	15.6%
Overberg	16.9%	10.2%	9.8%	11.5%	13.4%	16.9%	21.4%
Cape Town	15.2%	13.5%	14.1%	15.2%	16.4%	13.1%	12.6%
Winelands	13.2%	11.3%	12.5%	14.4%	16.7%	16.2%	15.6%
Garden Route & Klein Karoo	17.2%	12.5%	12.2%	12.9%	14.2%	14.9%	16.1%
Weskus	15.6%	11.8%	11.7%	13.1%	14.6%	14.9%	18.2%

# Points of Interest (POIs) Visited: Domestic Tourists

- **Shopping and markets** were the most popular types of attraction visited by domestic tourists with an average dwell time of **2.4 hours**.
- **Natural attractions** ranked as the 2<sup>nd</sup> most popular point of interest among domestic tourists with an average dwell time of **2.5 hours**.
- **Spending time in areas** like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked 3<sup>rd</sup> amongst the top POIs visited by domestic tourists, with an average dwell time of **3.2 hours**.
- **Bars and pubs** were the 4<sup>th</sup> most popular point of interest and domestic tourists spent an average of **3.2 hours** at the location.
- **Spending time at the beach** ranked the 5<sup>th</sup> most popular point of interest among domestic tourists, with an average dwell time of **2.3 hours**.

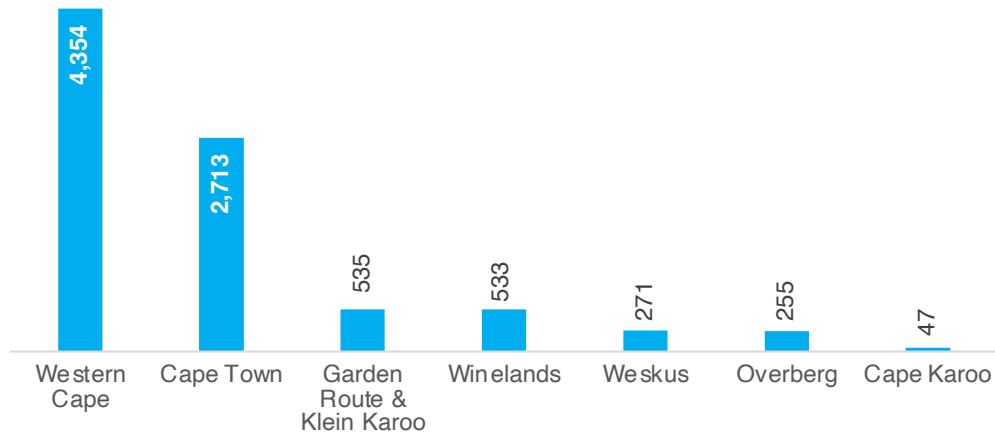
Top POIs Visited by Domestic Tourists, Jan–Mar. 2024



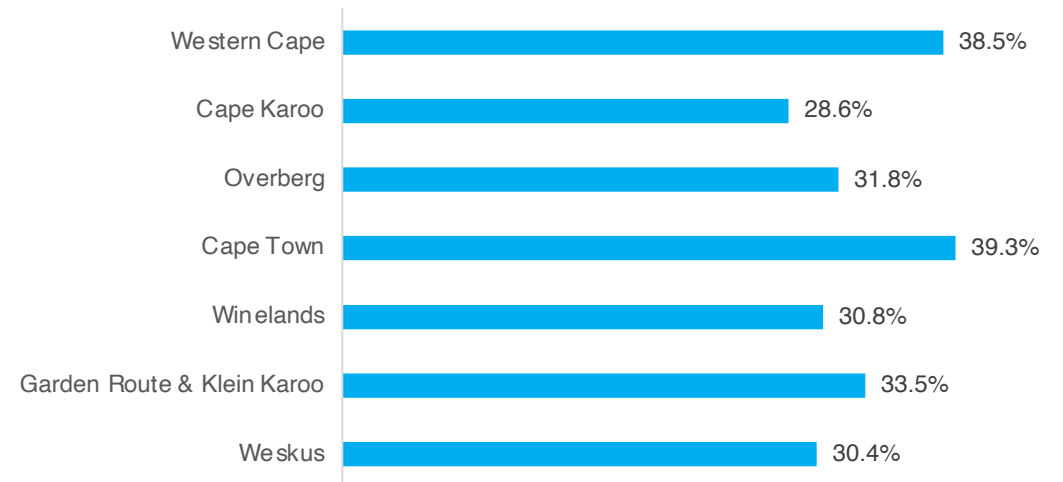
# Mobile Insights: International Visitor Trends

- Between January and March 2024, the Western Cape province received 4,354 international visitors and 38.5% of visitors returned for another visit.
- Cape Town, Garden Route & Klein Karoo, and Winelands were the most visited destinations within the province, with 2,713, 535, and 533 international tourists respectively between January and March 2024. On the other hand, the Cape Karoo region had the lowest number of tourists, with only 47 visitors during the same period.
- Cape Town was the most popular destination for international repeat visitors. Approximately 39.3% of the repeat visitors chose to return to the city. Other regions that were popular among tourists included Garden Route & Klein Karoo, Overberg, Winelands, Weskus, and Cape Karoo, with 33.5%, 31.8%, 30.8%, 30.4%, and 28.6% of tourists revisiting these regions respectively between January and March 2024.

International Sample Size, Jan–Mar. 2024



International Tourists Repeat Visits, Jan–Mar. 2024

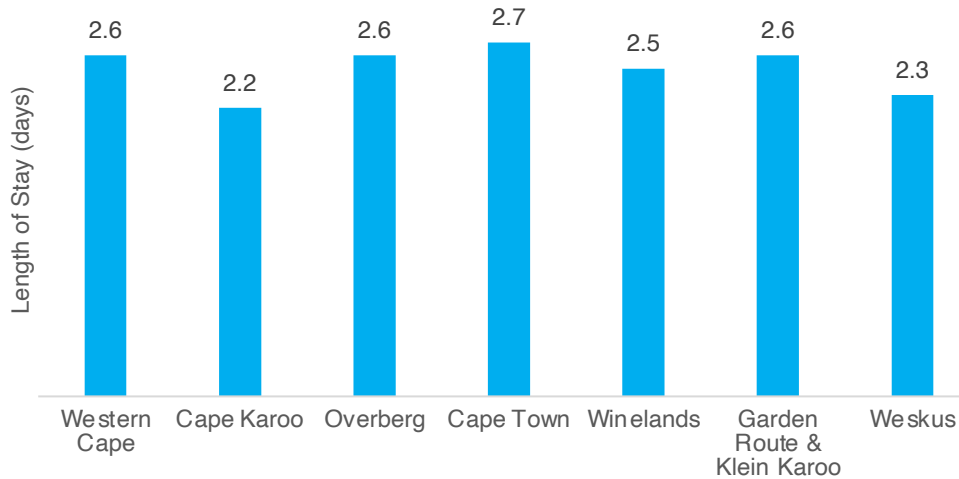


Source: Rove, 2024

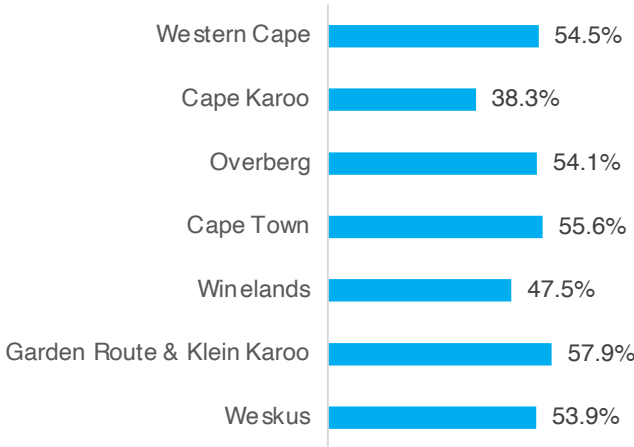
# Mobile Insights: International Visitor Trends

- According to the mobile data insights, all the Western Cape regions were popular destinations amongst international tourists with an average length of 2.7 days in Cape Town, 2.6 days at the Garden Route & Klein Karoo and Overberg, 2.3 days in Weskus and 2.2 days in Cape Karoo.
- The Garden Route & Klein Karoo region was the preferred choice for overnight stays among tourists, with 57.9% of them choosing to stay there. Cape Town was the second most popular choice for tourists, with 55.6% of them staying overnight. Over 50% of tourists stayed in the Overberg and Winelands regions, with 47.5% choosing to spend the night in the Winelands.
- The majority of tourists, who visited the province and its regions, stayed for 1-2 days. This information can help tourism officials understand how long international tourists tend to stay in the Western Cape and which regions they prefer to visit.
- It's worth noting that the overnight stay is defined as tourists who arrive before midnight and stay until 07:00 the following day.

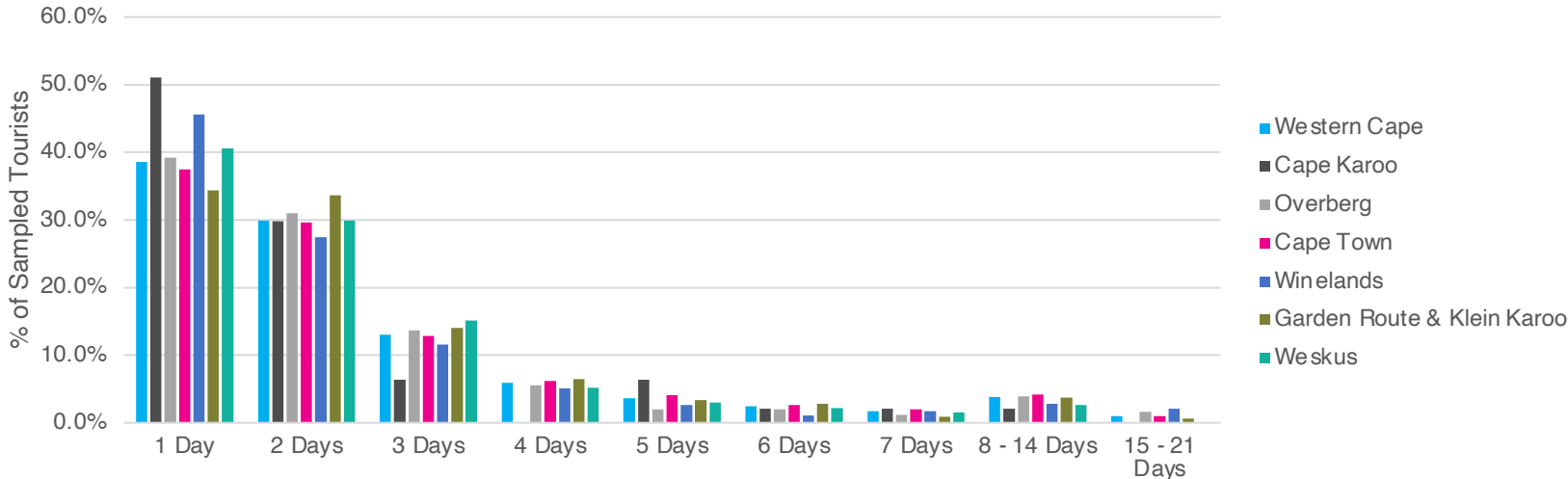
Average Length of Stay (LOS), Jan–Mar. 2024



% Overnight Stays, Jan–Mar. 2024



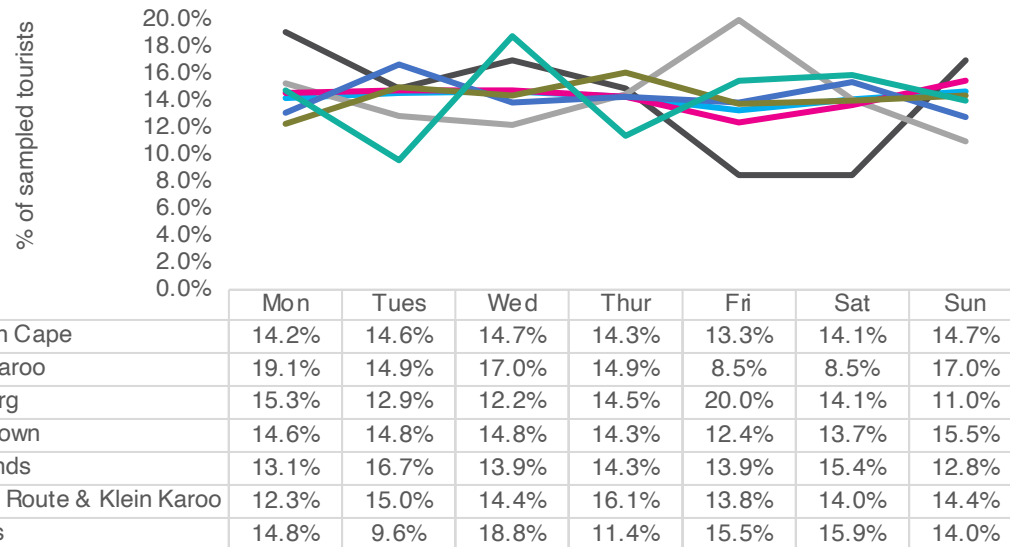
Average Length of Stay (Number of Days): International, Jan–Mar. 2024



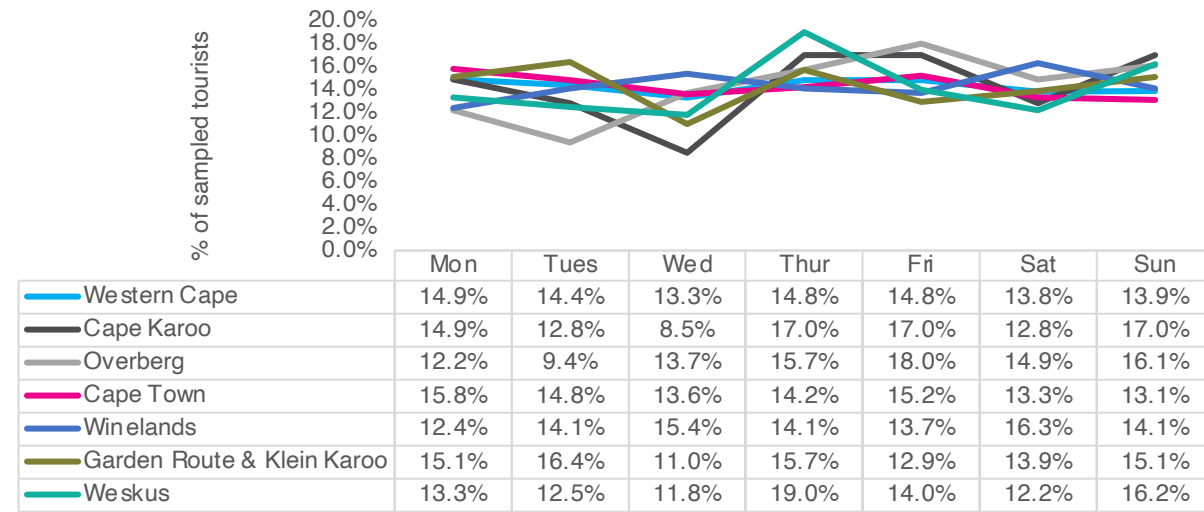
# Mobile Insights: International Visitor Trends

- According to recent findings on international visitor trends to the Western Cape between January and March 2024, it was observed that most tourists arrived on either Saturday or Sunday and left on Monday.
- During this period, a group of 47 tourists visited the Cape Karoo region on a Monday and departed either on Thursday, Friday, or Sunday. Furthermore, the findings indicated that the most popular arrival days for tourists in Cape Town were Sunday, while Monday and Friday were the preferred departure days.
- For tourists visiting the Winelands, it was observed that the most popular arrival days were Monday and Saturday, while the most popular departure days were Tuesday and Saturday. In the Garden Route & Klein Karoo region, visitors mostly arrived on Thursday and departed on Tuesday.
- In the Weskus region, Friday and Saturday were the most common arrival days, with Thursday being the most popular day of departure. Finally, for tourists visiting the Overberg region, Friday was the most popular day for both arrival and departure.

Popular Arrival Days of the Week: International, Jan–Mar. 2024



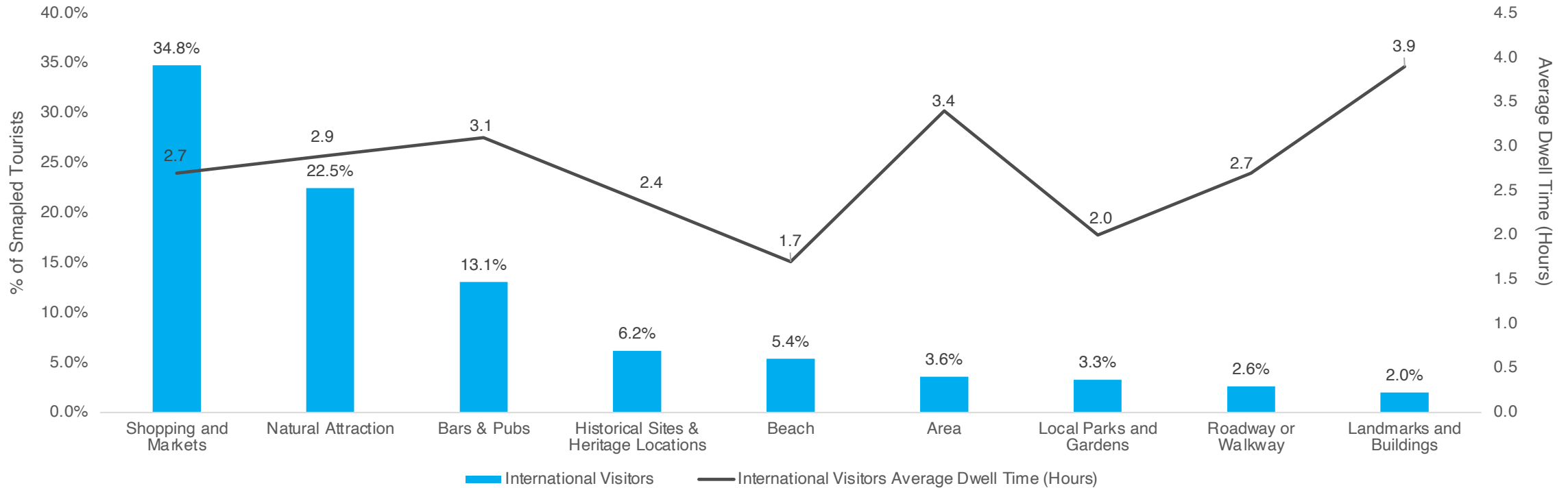
Popular Departure Days of the Week: International, Jan–Mar. 2024



# Points of Interest (POIs) Visited: International Tourists

- **Shopping and markets** were the most popular type of attraction visited by international tourists with an average dwell time of **2.7 hours**.
- **Natural attractions** ranked as the 2<sup>nd</sup> most popular point of interest among international tourists, with an average dwell time of **2.9 hours**.
- **Bars and pubs** were the 3<sup>rd</sup> most popular point of interest for international tourists spent an average of **3.1 hours** at the location.
- **Historical sites and heritage locations** ranked the 4<sup>th</sup> most popular point of interest among international tourists, with an average dwell time of **2.5 hours**.
- **Spending time at the beach** ranked 5<sup>th</sup> amongst the top POIs visited by international tourists, with an average dwell time of **1.7 hours**.

Top POIs Visited by International Tourists Jan–Mar. 2024



# 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 The 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.	
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Residents of the Western Cape are not counted as a tourists</li> <li>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</li> <li>Minimum duration of visit of 120 minutes excludes commuters driving through each region</li> </ul>		
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.	
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Residents of a city are not counted as tourists to the city</li> <li>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</li> </ul>		
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	
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Any 90-day period refers to any consecutive 90 days in their mobile location data history</li> <li>Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.).</li> </ul>		
What are Tourist Segments?		
<ul style="list-style-type: none"> <li><b>Local Tourists:</b> Tourists who reside within the same region.</li> <li><b>Domestic Tourists:</b> Tourists who reside in South Africa outside of the Western Cape</li> <li><b>International Tourists:</b> Tourists who reside outside of South Africa</li> </ul>		

# 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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