



Cape Town Tourism Visitor Trends January to June 2024

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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 3,490,654 visitors between January and June 2024. This reflects an increased growth of 18% y-o-y in visitation compared to the same period in 2023 (Jan–Jun).

Rove Mobile Location Data between January and June 2024 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 146,408 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 2.7 days, with 47.6% being repeat visitors. Additionally, 40.7% of domestic tourists stayed for just one day and in the months of January, February, April, and June, the average stay ranged from 2.6 to 2.9 days.
- Over 50% of domestic tourists preferred overnight stays in Cape Town and most visits occurred in January, February, April, May, 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 4,512 international tourists who explored the beauty of Cape Town. Among them, numerous visitors came from the United States, Australia, and Mexico.
- The average length of stay for international tourists was 2.6 days, with 37.3% having visited the region before. Additionally, 37.6% of international tourists only stayed for one day, with average stays of 3.0 days in January and 2.8 days in February and June.
- In Cape Town, over 50% of international tourists stayed overnight, with January to June being the most popular months for overnight stays. Additionally, Wednesday was the popular day of arrival, and departure day was Friday for 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

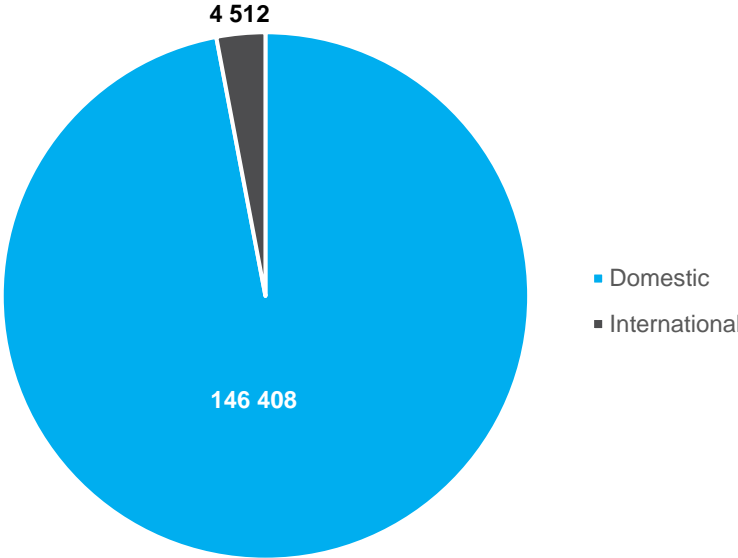
- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

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 Mobile Location Data Insights: Sample Size

- The insights in this report represents mobile location data from a sample of **146,408 domestic** and **4,512 international** tourists who visited Cape Town between January and June 2024.
- Within the domestic data set, **25,493** were from Johannesburg, **14,085** from Tshwane and **11,138** from Ekurhuleni.
- Amongst the international tourists in the sample, **1,421** were from the United States, **411** from Australia, and **293** from Mexico. This can be seen in Figures 1, 2, and 3.

Figure 1: Cape Town Sample size, Jan–Jun 2024



Source: Rove (2024)

4. Cape Town Visitor Trends: Origin of Tourists

Figure 2: Municipalities of origin for domestic tourists to Cape Town, Jan–Jun 2024

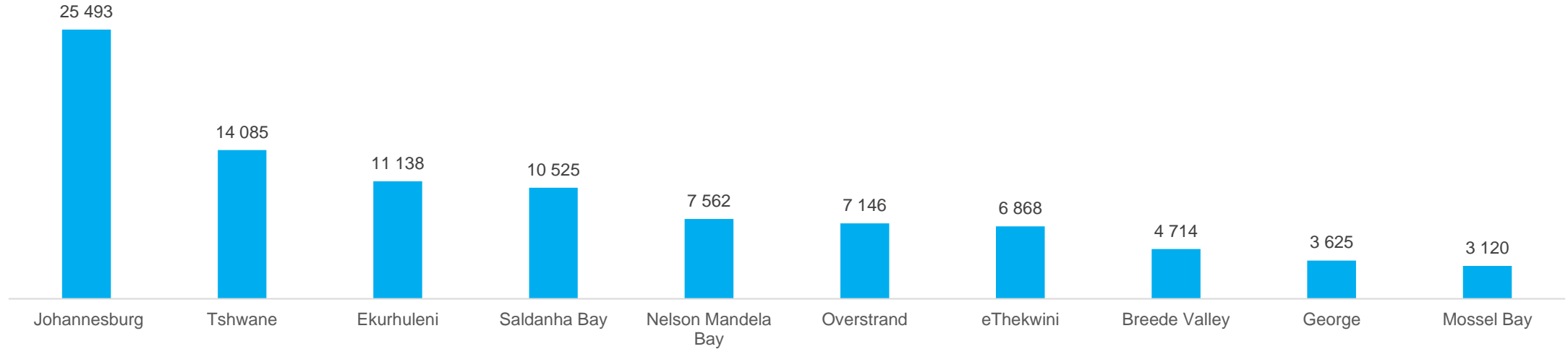
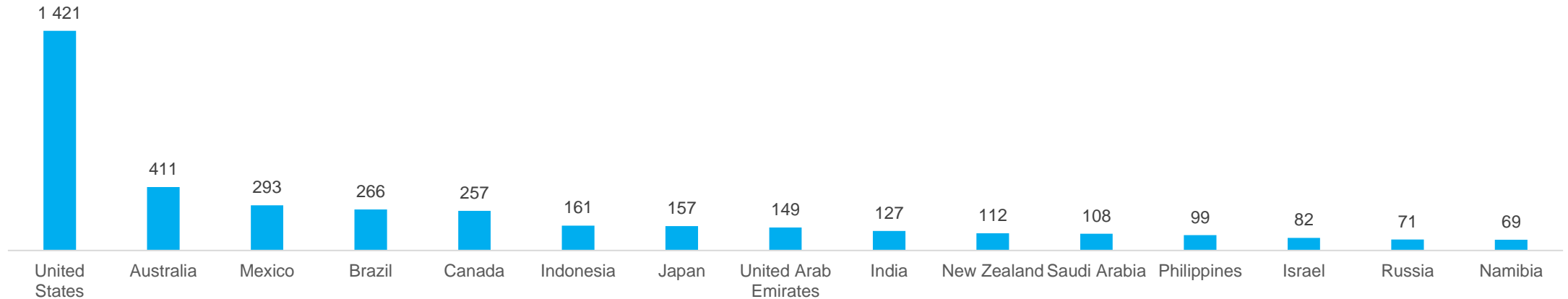


Figure 3: Countries of origin for international tourists to Cape Town, Jan–Jun 2024



5. Average Length of Stay and Repeat Visitors

Figure 4: Average length of stay (LOS), Jan–Jun 2024

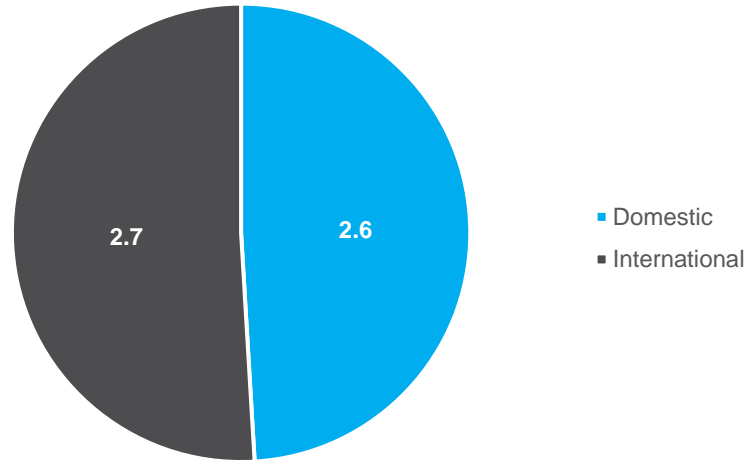
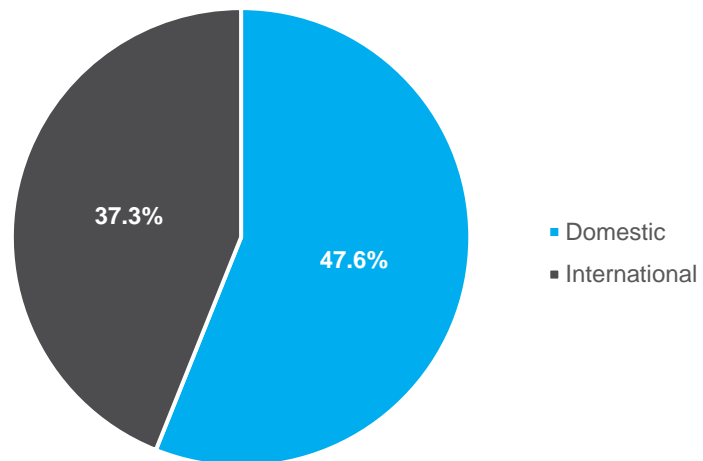


Figure 5: Repeat visits to Cape Town, Jan–Jun 2024



- On average, domestic and international tourists spent 2.6 and 2.7 days in Cape Town, respectively. This information is based on the data analysed between January and June 2024 and highlights the average length of stay of tourists to Cape Town which is reflected in Figure 4.
- The data showed that 47.6% of domestic tourists and 37.3% of international tourists were repeat visitors to the region, as shown in Figure 5. This indicates that Cape Town is a popular destination among tourists, who often choose to return for subsequent visits.
- However, findings also indicated that 40.7% of domestic tourists and 37.6% of international tourists visited Cape Town for just one day (Figure 7).
- The mobile data provided information about the average length of stay by tourists in the region by month, as shown in Figure 8. Domestic tourists stayed on average between 2.6 to 2.9 days during the months of January, February, April, and June. International tourists stayed on average for 3.0 days in January and for 2.8 days in February and June.

Source: Rove (2024)

6. Average length of stay in Cape Town

Figure 7: Average length of stay (Number of days) in Cape Town, Jan–Jun 2024

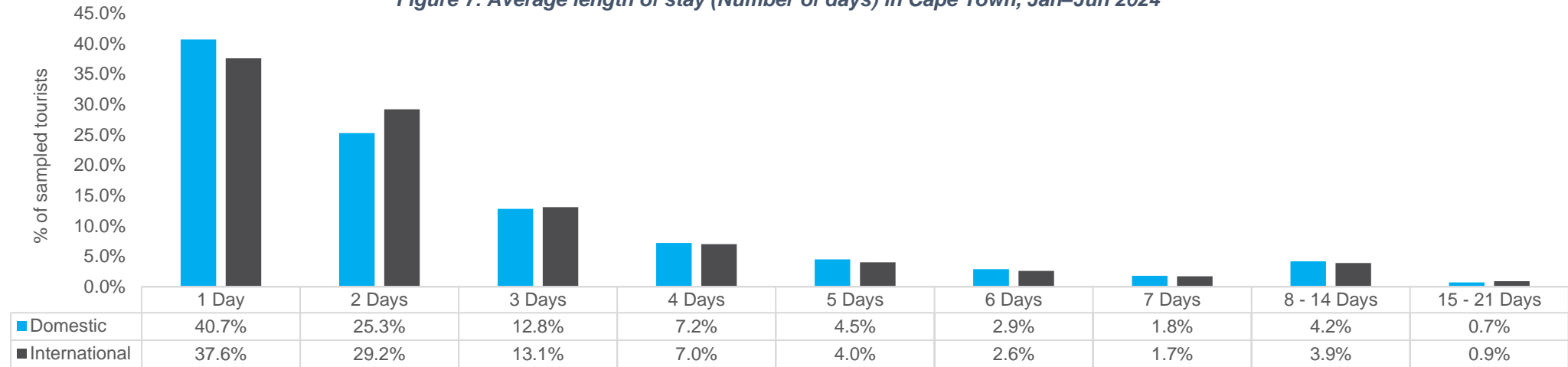
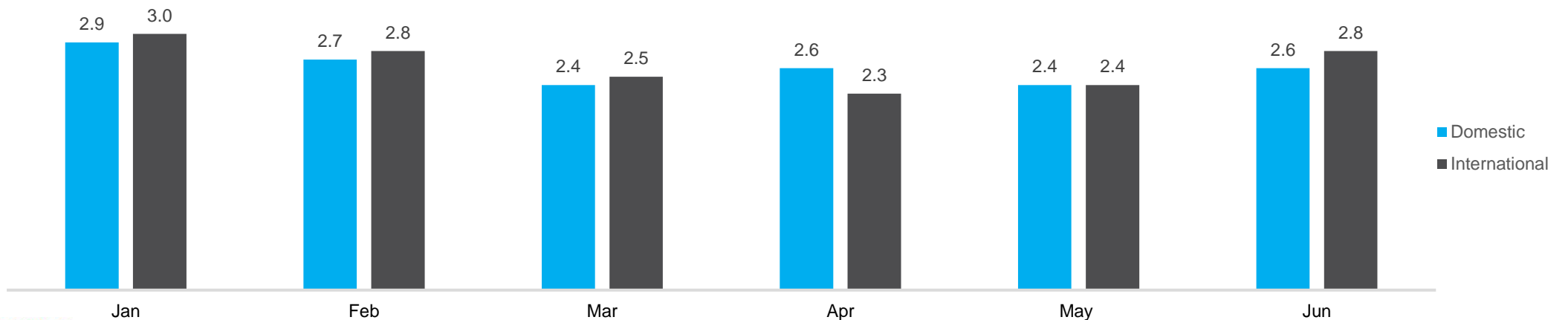
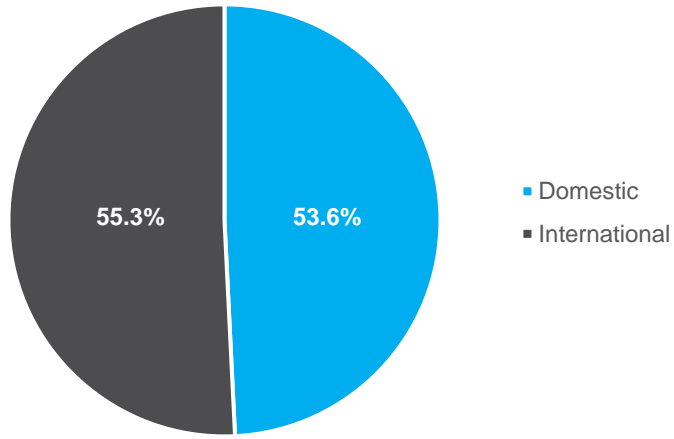


Figure 8: Average length of stay in the region by month, Jan–Jun 2024



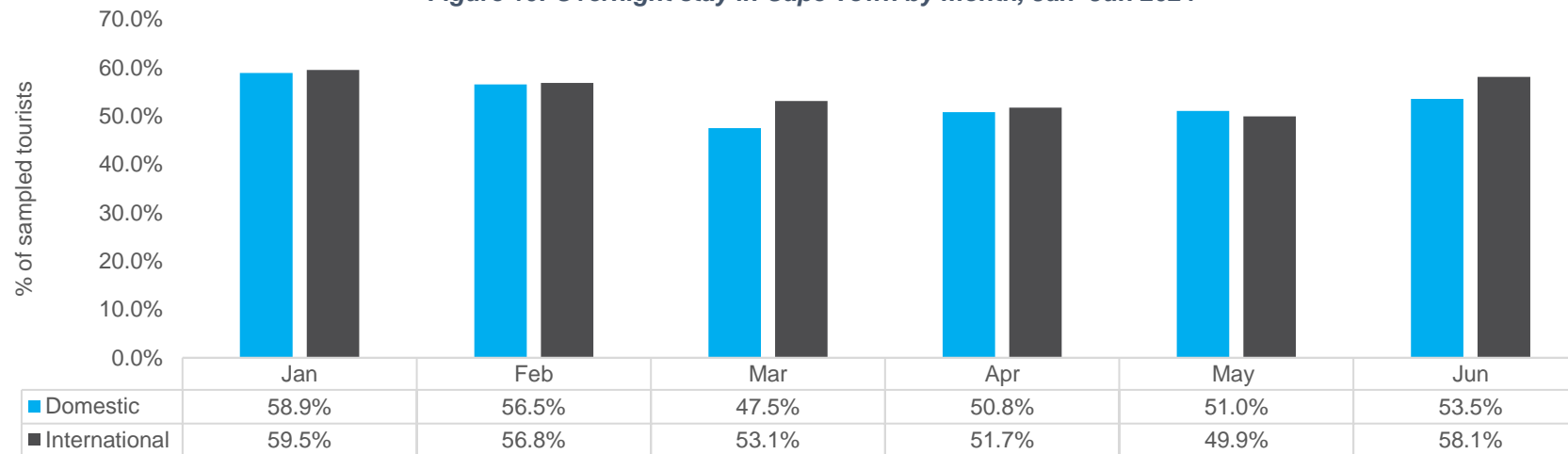
7. Overnight stay trend in Cape Town

Figure 9: Overnight stay in Cape Town, Jan–Jun 2024



- It is interesting to note that from the mobile data insights over 50% of sampled international and domestic tourists preferred to stay overnight in Cape Town. This can be observed in Figure 9.
- In addition, as presented in Figure 10, the months of January, February, April, May and June were the most popular for domestic tourists to stay overnight in the region. On the other hand, January to June were the most popular months for international tourists staying overnight in the region.

Figure 10: Overnight stay in Cape Town by month, Jan–Jun 2024



8. Popular arrival and departure days

- Figures 11 and 12 indicate that Friday was the most popular day for both arrival and departure among domestic tourists, while international tourists tended to arrive on Wednesday and depart on a Friday from Cape Town.
- This data shows that domestic and international visitors often plan their trips around those specific days. This information can be helpful for businesses and organisations in the tourism industry to better understand the behaviour and preferences of their international market originating from the United States, Australia, and Mexico and domestic market originating from Johannesburg, Tshwane, and Ekurhuleni.

Figure 11: Popular arrival days of the week in Cape Town, Jan–Jun 2024

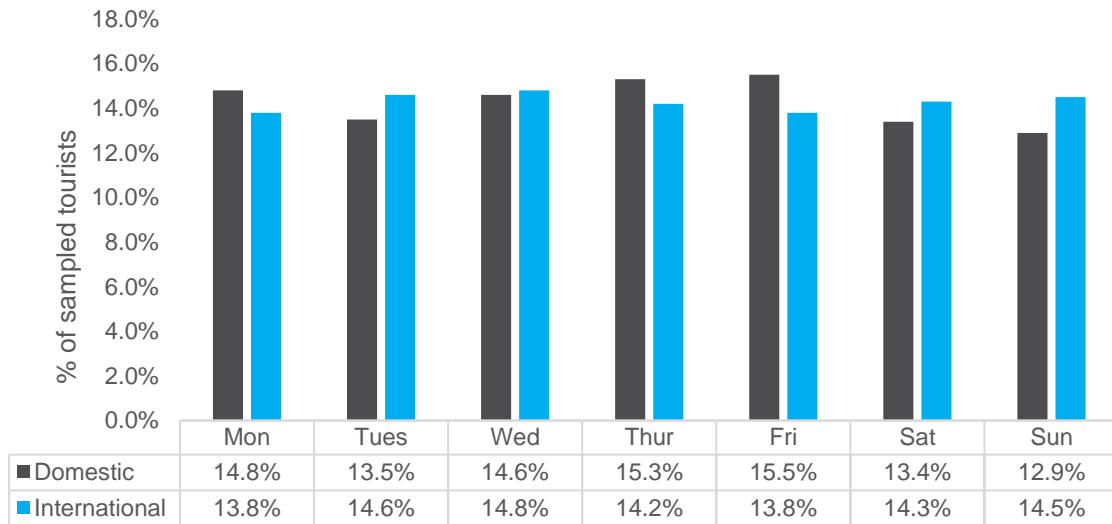
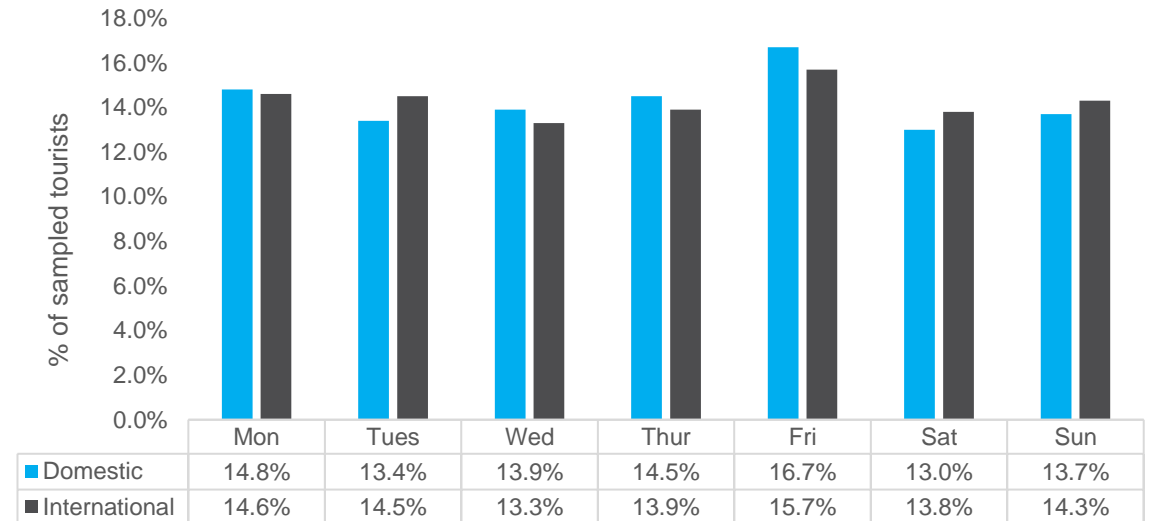


Figure 12: Popular departure days of the week from Cape Town, Jan–Jun 2024



An aerial photograph of the Cape Peninsula coastline in South Africa. The image shows the ocean in the foreground, with white surf breaking on the shore. In the middle ground, there are several prominent mountains, including the iconic Table Mountain with its flat top. The sky is a clear, pale blue. The overall scene is bright and scenic.

Bi-annual Performance of Cape Town Attractions

9. Performance of Cape Town Attractions

Table 1: Performance of Cape Town attractions, Jan–June 2024

Cape Town	Jan–Jun 2023	Jan–Jun 2024	Y-o-Y Growth
1. Table Mountain National Park	1 279 902	1 560 551	22%
2. Table Mountain Aerial Cableway	473 249	566 995	20%
3. Table Mountain National Park: Cape of Good Hope	432 297	496 268	15%
4. Table Mountain National Park: Boulders	339 657	417 324	23%
5. Kirstenbosch National Botanical Garden	323 035	319 498	-1%
6. Robben Island	114 062	130 018	14%
Total	2 962 202	3 490 654	18%

Data Sources: SANParks, Table Mountain National Park, Table Mountain Aerial Cableway, Kirstenbosch National Botanical Garden and Robben Island. (2024)

- Six participating attractions in Cape Town recorded a total of 3,490,654 visitors between January and June 2024, representing an increased growth of 18% in the number of visitors compared to January–June 2023. This can be seen in Table 1.

An aerial photograph of a coastline with mountains and the ocean. The mountains are in the background, and the ocean is in the foreground. The text is overlaid on the image.

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.)

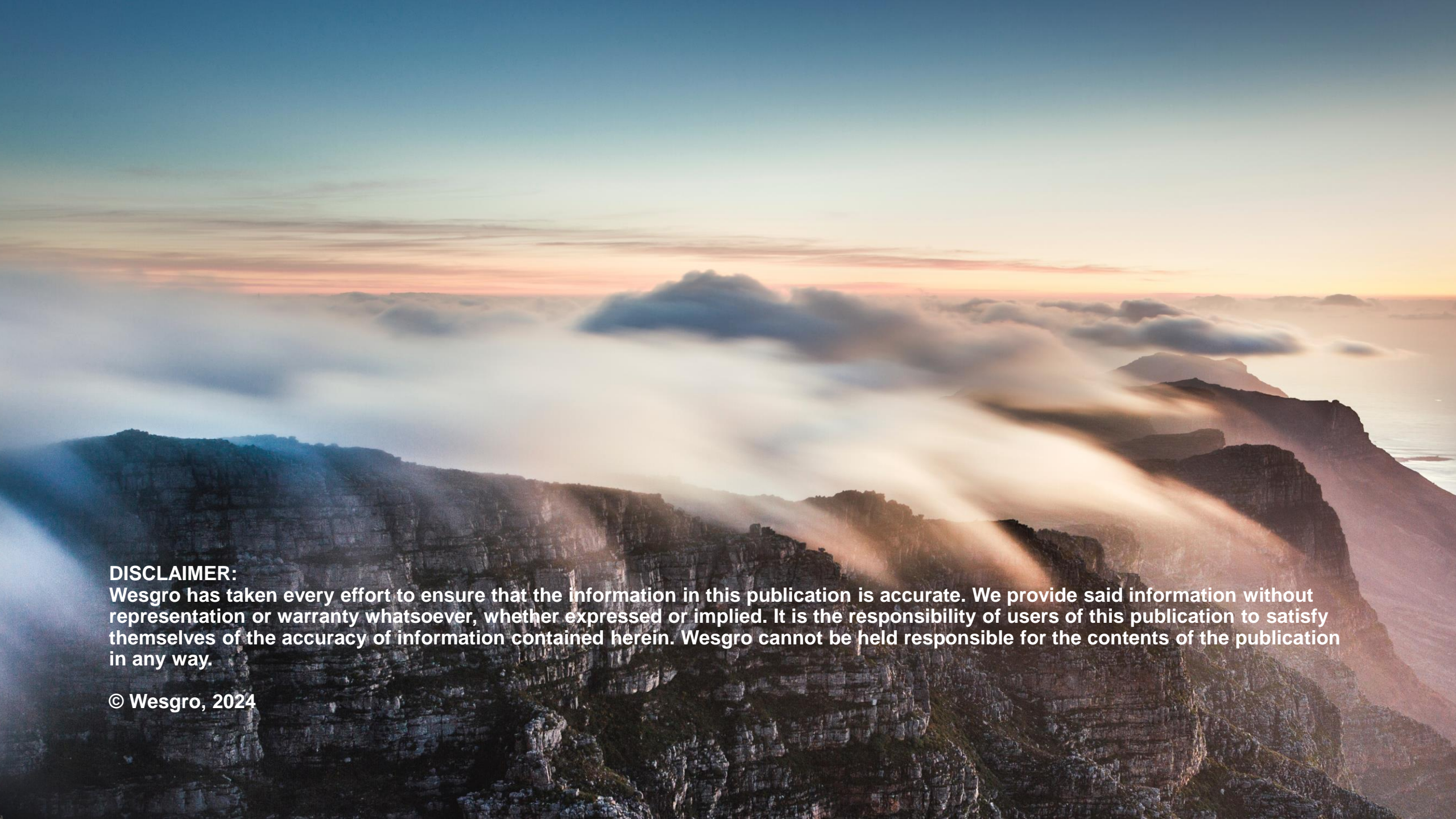
Source: Rove (2024)

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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