



Glossary

- South African resident refers to either a South African citizen or a non-South African citizen with a South African permanent residence permit.
- Overseas: Europe, North America, Central and South America, Australasia, the Middle East and Asia.
 - Overseas refers to all countries outside Africa.
- Africa: SADC and 'other' Africa (East and Central Africa, West Africa and North Africa).
 - o Africa refers to all the countries in Africa (both mainland and island countries).
- TFDS Total Foreign Direct Spend
- SA South Africa
- WC Western Cape
- MICE Meetings, Incentives, Conferences and Exhibitions
- VFR Visiting friends and relatives



Executive Summary

In Q3 2024, tourist arrivals (overseas incl. Africa) in the Western Cape reached 275,091, translating to a Total Foreign Direct Spend (TFDS) of R4.3 billion for the quarter. The number of bed nights totalled 3.2 million in Q3 2024, resulting in an average length of stay of 12 nights.

Looking at source markets, the USA, the UK and Germany ranked as the leading overseas countries for tourist arrivals in the Western Cape in Q3 2024. The top 10 overseas countries accounted for 57.0% of total tourist arrivals in the province, predominantly originating from North and South America, Europe and Australasia.

The countries with the largest share of tourists for the quarter were the USA (14.5% share) and the UK (11.1% share). The top 10 overseas markets collectively accounted for R2.76 billion in TFDS in Q3 2024.

Tourist arrivals from Africa (excl. SA residents) reached 66,740 in Q3 2024, with Namibia, Zimbabwe, and Lesotho ranking as the top three source markets. Tourist arrivals from the African continent collectively generated R756 million in TFDS in Q3 2024.

Close to 60% of tourists visiting the Western Cape travelled for holiday purposes in Q3 2024, followed by 23.9% who mainly visited friends and relatives (VFR). The preferred accommodation types included staying with friends and family, hotels and guesthouses. The top cities visited by tourists were Cape Town, Stellenbosch and Simon's Town, and the top attractions visited included the V&A Waterfront, Cape Town City Centre and Table Mountain National Park: Boulders.

In Q3 2024, the Western Cape registered 0.6 million domestic trips, generating an overnight spend of R3.7 billion, and an average spend per trip of R5,760 across the same period.

Domestic bed nights totalled 4.0 million in Q3 2024, with an average stay of 6.2 nights, the highest number of nights across all of the provinces. The Western Cape's high average spending and longer stays by domestic tourists are an indication of the province's premium tourism offerings and strong appeal to domestic travellers.



Western Cape Tourism Performance:

Overseas and the Africa Market Q3 2024 (Jul-Sep)



Definitions

Methodology

Visitor – Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for travel is other than the exercise of an activity to be remunerated at the place visited.

Same day visitor – Any person who visits a place without staying the night.

Tourist – A visitor who stays at least one night in the place visited.

International tourist – An international visitor who stays at least one night in collective or private accommodation in the country visited.

Overnight trip – A journey undertaken by one or more members of the household for at least one night away from home, where the persons travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.

The tourism data represented in this report is based on findings obtained from South African Tourism's Analytics and Insights Unit and is derived from South African Tourism's Departure Survey.

The survey has been deployed by South African Tourism since 2001 to monitor and measure international tourism behaviour upon departing the country.

The survey aims to track tourist travel behaviour, expenditure, accommodation usage, experiences as well as satisfaction of South Africa as a holiday and business destination.

The survey is conducted monthly and covers South Africa's two main international airports (Oliver Tambo and Cape Town), as well as the 12 main land border posts.



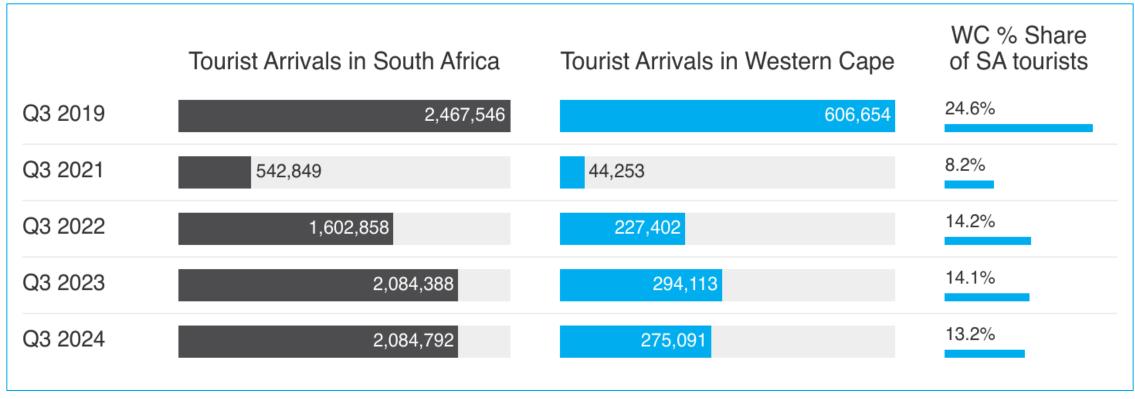
TOURISM HIGHLIGHTS: Q3 2024

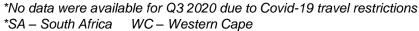
South Africa		Western Cape					
Tourist Arrivals (overseas, incl. Africa)							
(+0.02% g	2 084 792 rowth increase compared to Q3 2023)	275 091 (13.2% share of SA tourist arrivals) (-6.5% decrease compared to Q3 2023)					
Total Foreign Direct Spend (TFDS)							
R20.5 billion (-4.4% decrease compared to Q3 2023)		R4.3 billion (21.1% share of SA TFDS) (-5.1% decline compared to Q3 2023)					
Main Purpose of Visit							
VFR	50.1% compared to 55.0% share of Q3 2023	Holiday	56.2% compared to 60.4% share of Q3 2023				
Length of Stay							
12.0 nights (-9.1% decrease compared to Q3 2023)		12.0 nights compared to 16.1 nights in Q3 2023					



Western Cape Tourism Performance: Tourist Arrivals

The Western Cape held a **13.2% share** of South Africa's tourist arrivals in Q3 2024 (Jul–Sep), reaching **275,000 tourist arrivals**, a decline of -6.5% in relation to Q3 2023.







Western Cape Tourism Performance: USA, UK and Germany rank as top three overseas source markets in Q3 2024.





Western Cape Tourism Performance: WC Top 10 Source Markets TFDS reached R2.76 billion in Q3 2024.

Top 10 WC Markets	Q3 2019 Tourist Arrivals	Q3 2023 Tourist Arrivals	Q3 2024 Tourist Arrivals	Q3 23/24 % Change	Q3 2024 TFDS	Q3 2024 Average Spend
USA	43,441	37,423	39,864	6.5%	R643mn	R16,800
UK	59,841	37,791	30,455	-19.4%	R722mn	R24,500
Germany	44,438	21,521	17,218	-20.0%	R305mn	R18,400
Netherlands	18,245	17,017	15,216	-10.6%	R281mn	R19,100
France	20,439	14,833	13,174	-11.2%	R226mn	R17,700
■ Italy	8,047	14,657	11,817	-19.4%	R161mn	R14,200
Australia	11,896	9,627	10,959	13.8%	R168mn	R15,900
Srazil	7,351	2,375	6,455	171.8%	R74mn	R12,500
◆ Canada	8,642	5,533	6,290	13.7%	R78mn	R13,000
Spain Spain	4,471	7,411	6,062	-18.2%	R100mn	R16,900

*TFDS – Total Foreign Direct Spend *WC – Western Cape



Western Cape Tourism Performance: Africa (excl. SA residents)



Africa tourist arrivals in the Western Cape (Q3 2024) 66,740



Africa TFDS in the Western Cape (Q3 2024)

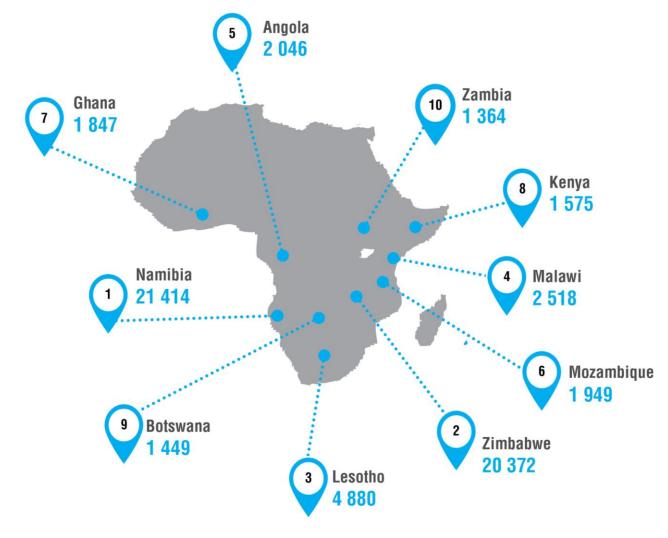
R756 million



Average spend from **Africa** in the Western Cape (Q3 2024)

R11,600

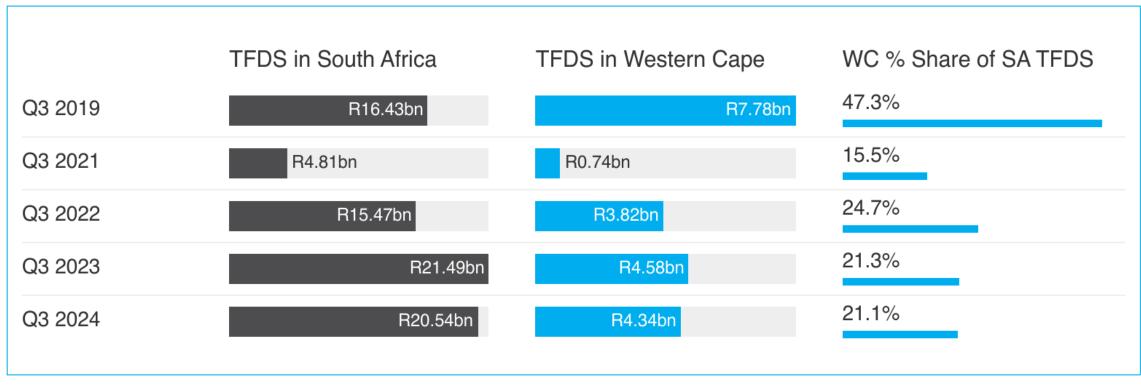
Top Markets for Tourist Arrivals from Africa (Q3 2024)





Western Cape Tourism Performance: TFDS

The Western Cape held a 21.1% share of South Africa's TFDS in Q3 2024 (Jul–Sep), reaching R4.3 billion, a decline of -5.1% in relation to the same period in 2023.



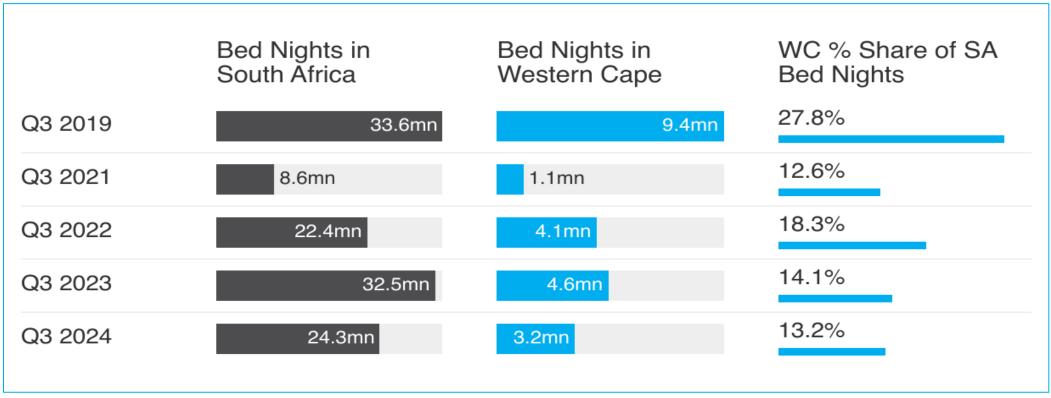
*No data were available for Q3 2020 due to Covid-19 travel restrictions.

^{*}TFDS - Total Foreign Direct Spend



Western Cape Tourism Performance: Bed Nights

The Western Cape held a **13.2% share** of South Africa's bed nights in Q3 2024 (Jul–Sep), reaching **3.2 million**, a decline of -30.1% against Q3 2023.



*No data were available for Q3 2020 due to Covid-19 travel restrictions.



Western Cape Tourism Performance: Length of Stay

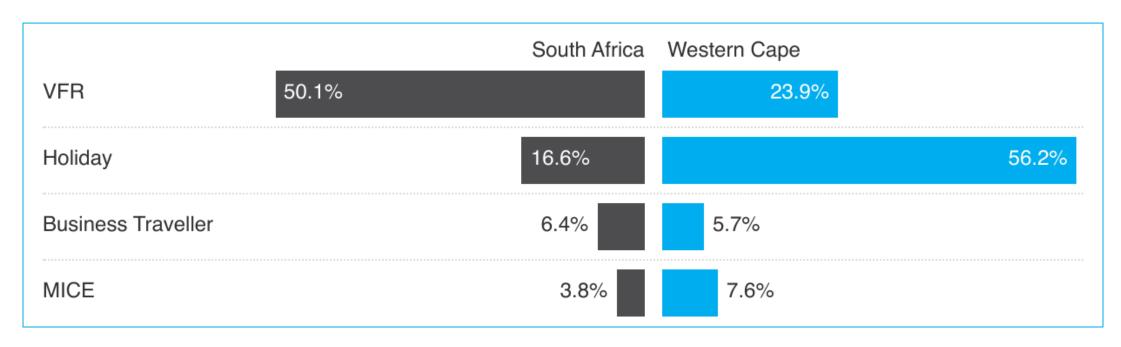
Overnight stays in the Western Cape translated to an average length of stay of **12.0 nights** in Q3 2024, aligned to the national average of 12.0 nights over the same period.



^{*}No data were available for Q3 2020 due to Covid-19 travel restrictions.



Western Cape Tourism Performance: Close to 60% of visitors to the Western Cape travelled for holiday purposes in Q3 2024.





Top 5 accommodation types

Friends & Family Hotel Guesthouse Self-catering Bed & Breakfast



Top 5 cities visited

Cape Town Stellenbosch Simon's Town Hermanus Hout Bay



Top 5 attractions visited

V&A Waterfront
Cape Town City Centre
Table Mountain National Park: Boulders
Camps Bay
Cape Point



Western Cape Tourism Performance:

Domestic Market: Q3 2024 (Jul-Sep)



Definitions

Domestic Overnight Trips – Domestic trips where tourists spend at least one night away from their usual place of residence, which are at least 40km, one way, but visited less frequently than once a week (unless for leisure purposes). These trips must not have been for relocation and remuneration purposes.

Domestic Overnight Spend – The total amount of money during an overnight stay at a destination, including accommodation, food, transportation, and activities.

Average Spend –The average spend refers to the mean amount of money spent by a specific group of individuals over a set period. For domestic tourism, it would be the total amount of money spent by all domestic tourists, divided by the number of trips.

Bed Nights – The total number of nights spent in accommodation establishments by domestic tourists.

Length of Stay – The number of nights a domestic tourist spends at a destination during their trip.

Main Purpose of the Trip – This is the purpose in the absence of which the trip would not have been taken.

Methodology

South African Tourism's Domestic Survey is conducted through inhome face-to-face interviews – the most feasible interview approach for this type of study, in order to ensure high data quality. The sample is designed as a multi-stage, stratified sample of n=1 300 per month.

The sampling framework is built from geographic strata based on enumerator areas (EAs) used as primary sampling units (PSUs), and households, used as the secondary sampling units (SSUs). In each EA drawn, four households are systematically selected with an equal selection probability. However, the EAs are disproportionally allocated to the main strata in order to ensure sufficient representation of domestic tourism from smaller provinces. The sample design ensures all stratification variables such as province, metro, urban, rural, race, age, and gender are covered. The domestic survey has a margin of error of 2.7% at a confidence level of 95% for the monthly sample. Results are weighted based on Stats SA's mid-year population estimates of SA residents aged 18 and above, and as such, the sample is representative of SA's adult population.

Due to the Covid-19 pandemic, surveying in-home face-to-face became impossible and the survey was halted at the end of February 2020. The survey was renewed in July 2020 (for March travel).



DOMESTIC TOURISM HIGHLIGHTS: Q3 2024

South Africa		Western Cape					
Domestic Overnight Trips 🥀							
(+27.8% ir	11.5 million acrease compared to Q3 2023)	0.6 million (-50.1% decline compared to Q3 2023)					
Domestic Overnight Spend							
(+10.1% grow	R33,3 billion yth increase compared to Q3 2023)	R3,7 billion (+29.8% decrease compared to Q3 2023)					
Average Domestic Overnight Spend							
(-14.0%	R2 890 decline compared to Q3 2023)	R5 760 (+40.5% growth increase compared to Q3 2023)					
Bed Nights Land							
(+18.8% grow	39.2 million yth increase compared to Q3 2023)	4.0 million (-22.8% decline compared to Q3 2023)					
Length of Stay (
(-7.0% d	3.4 nights ecline compared to Q3 2023)	6.2 nights (+54.7% increase compared to Q3 2023)					
Main Purpose of Visit							
Visiting Friends and Relatives (VFR)	39.4% (+30.6% increase compared to Q3 2023)	Visiting Friends and Relatives (VFR)	47.8% (+25.9% increase compared to Q3 2023)				



Western Cape Tourism Performance: Domestic Overnight Trips

The Western Cape held a 5.6% share of South Africa's total domestic trips in Q3 2024 (Jul–Sep), reaching 0.6 million trips, a decline of -50.1% compared to Q3 2023.

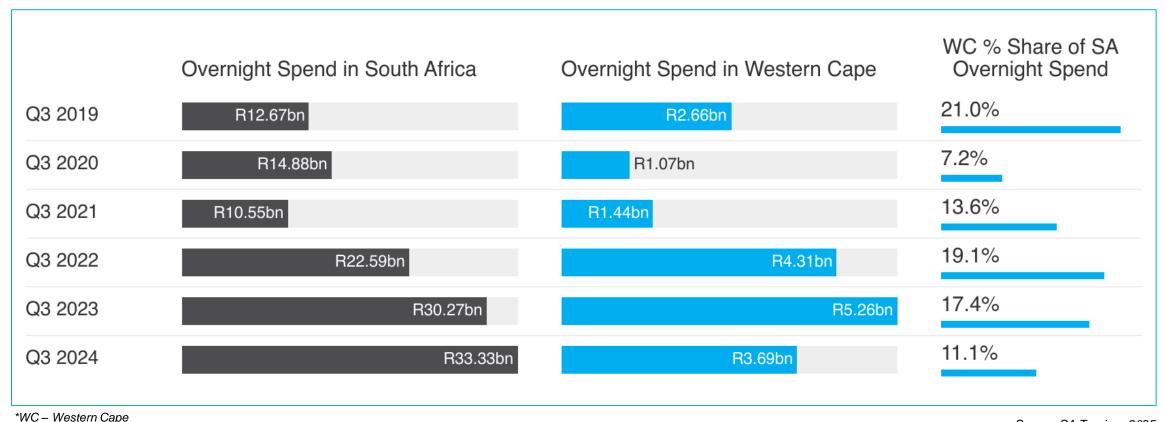


*WC - Western Cape.



Western Cape Tourism Performance: Domestic Overnight Spend

The Western Cape held an 11.1% share of South Africa's total domestic overnight spend in Q3 2024 (Jul–Sep), reaching R3.69 billion, a decline of -29.8% compared to Q3 2023.

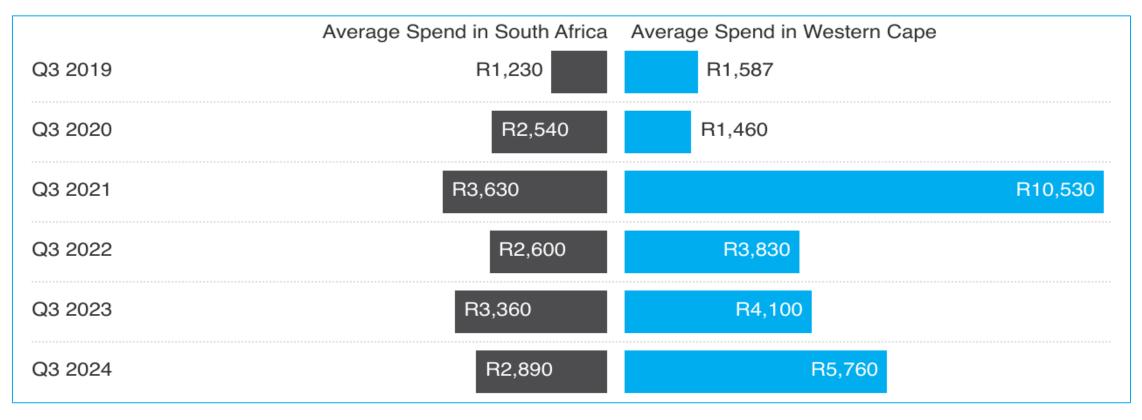




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Western Cape Tourism Performance: Domestic Average Spend

The Western Cape's domestic average spend reached R5,760 in Q3 2024, an increase of +40.5% when compared to Q3 2023.

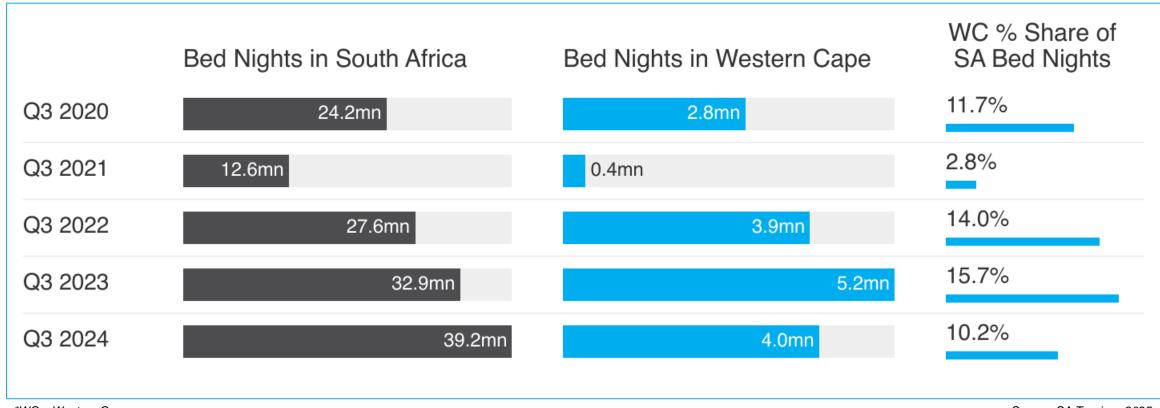


*WC – Western Cape *SA – South Africa



Western Cape Tourism Performance: Bed Nights

The Western Cape held a 10.2% share of South Africa's total domestic bed nights in Q3 2024 (Jul–Sep), reaching 4.0 million and registering a decrease of -22.8% against Q3 2023.

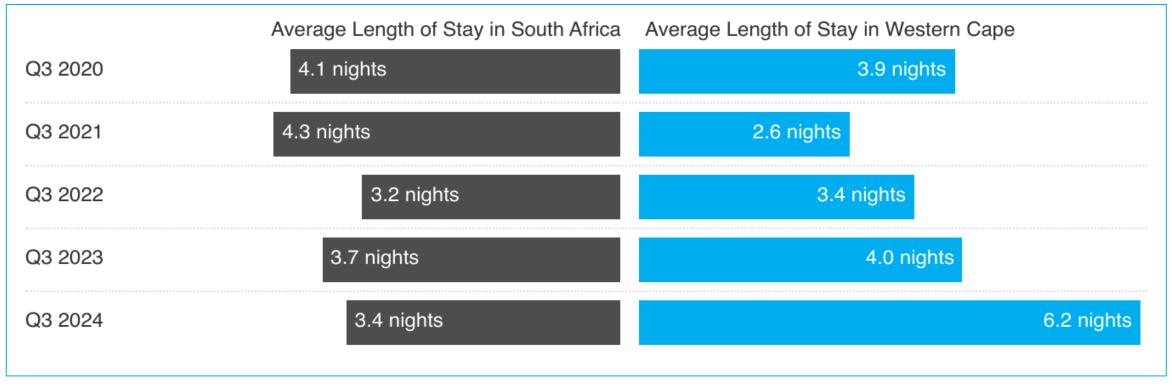


*WC – Western Cape.
*Q3 2019 data not available.



Western Cape Tourism Performance: Average Length of Stay

Overnight domestic trips to the Western Cape translated to an average length of stay of 6.2 nights in Q3 2024 (Jul–Sep), recording a +54.7% increase compared to Q3 2023.

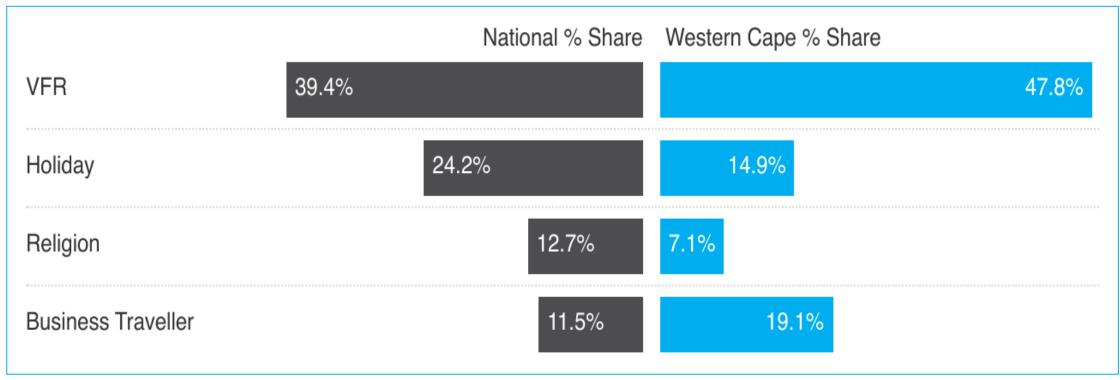


*Q3 2019 data not available. Source: SA Tourism, 2025



Western Cape Tourism Performance: Purpose of Visit

VFR ranked as the main purpose for visiting the Western Cape in Q3 2024 (Jul–Sep), recording a share of 47.8%, while the national share for VFR reached 39.4% over the same period.



^{*}VFR - Visiting Friends and Relatives.



^{*}Personal & business shopping was removed due to very low sample counts.

