



Cape Town Tourism Visitor Trends

January to December 2024

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1. Executive Summary

Rove Mobile Location Data was used from January and December 2024 to gain insights into the travel behaviour of domestic and international tourists visiting Cape Town. The following findings were observed:

➤ Domestic tourists:

- Mobile location data provided insights into the travel patterns of 352,752 domestic tourists who visited Cape Town. Most of these tourists came from Johannesburg, Tshwane, Ekurhuleni, Saldanha Bay, and Nelson Mandela Bay.
- The average length of stay for domestic tourists in Cape Town was 2.8 days: 44.5% of these were repeat visitors. In addition, 39.5% of domestic tourists stayed for just one day. In January and June 2024, the average length of stay ranged from 3.0 to 3.3 days.
- Some 55.1% of domestic tourists preferred to stay overnight in Cape Town, with a consistent distribution of overnight stays throughout the year. Thursday was the most popular arrival day, while Friday was the favoured departure day.

➤ International tourists:

- Mobile location data provided valuable insights into the travel patterns of 9,903 international tourists who explored the beauty of Cape Town. Many of these visitors came from the United States, Australia, Mexico, Brazil, and the United Arab Emirates.
- On average, international tourists stayed for 2.8 days, with 56.7% having visited the region previously. In addition, 36.0% of international tourists stayed for only one day, while those who visited in January, June, and December had average lengths of stay ranging from 3.0 to 3.3 days.
- In Cape Town, 56.7% of international tourists stayed overnight, with a consistent distribution of overnight stays throughout the year. Notably, Sunday emerged as the most popular day for arrivals, and Friday was the popular day for departures among 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 international and domestic sample counts:

The volume of mobile location data 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

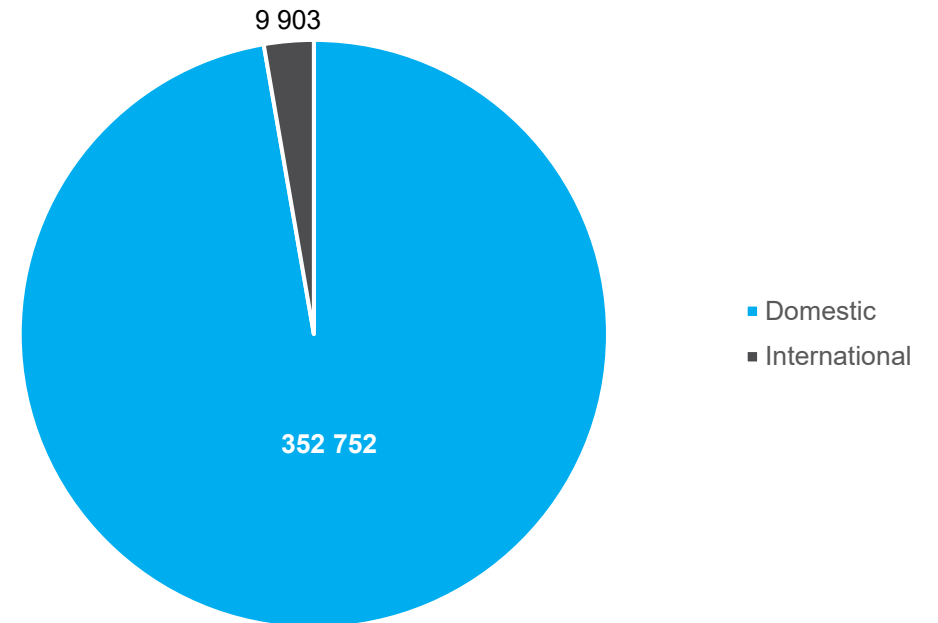
- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

While all mobile devices are affected by the 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 phones through wi-fi services. Tourists may not use the partnership apps they usually use while on extensive holidays. Restricting data privacy laws are also affecting the international landscape, which has an impact on the data that can be shared. This, in turn, may affect processing that identifies tourists.

3. Cape Town Mobile Location Data Insights: Sample Size

- The insights in this report represent mobile location data from a sample of **352,752 domestic** and **9,903 international tourists** who visited Cape Town between January and December 2024. This is illustrated in Figure 1.
- Figure 2 shows that within the domestic data set, 61,862 visitors were from Johannesburg, 34,269 from Tshwane, 27,629 from Ekurhuleni, 24,599 from Saldanha Bay, and 18,757 from Nelson Mandela Bay.
- Among the international tourists in the sample, 2,962 were from the United States (US), 990 from Australia, 670 from Mexico, 566 from Brazil, and 430 from the United Arab Emirates (UAE). This can be seen in Figure 1, 2, and 3.

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



4. Cape Town Visitor Trends: Origin of Tourists

Figure 2: Municipalities of origin for domestic tourists visiting Cape Town, Jan–Dec 2024

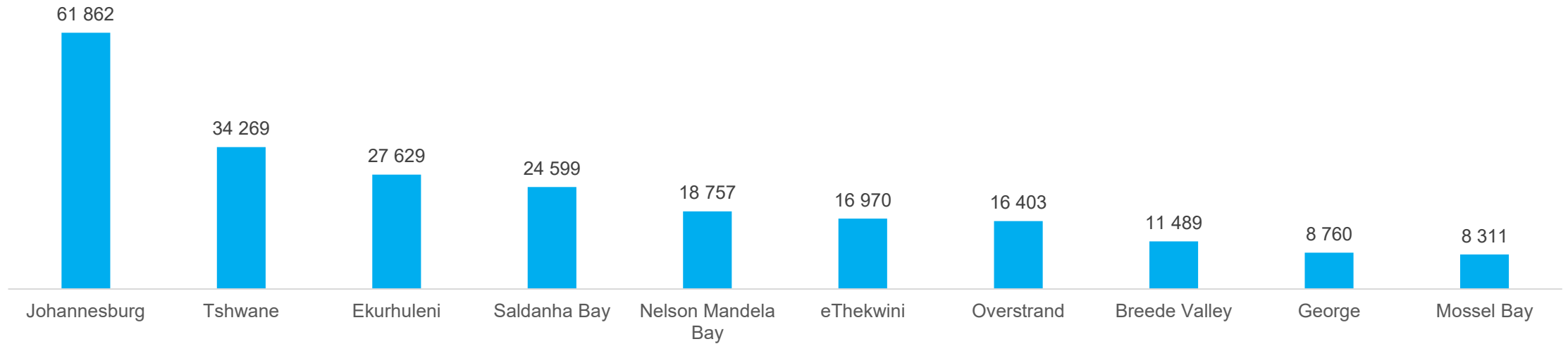
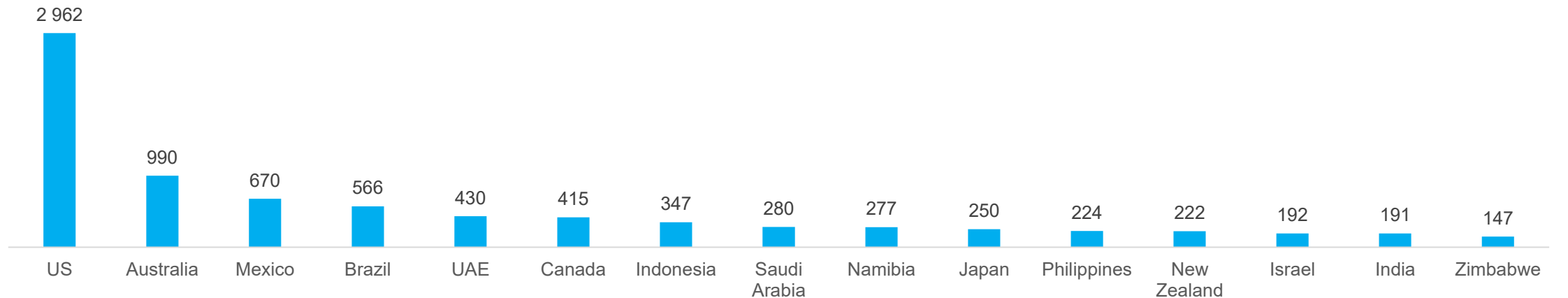


Figure 3: Countries of origin for international tourists visiting Cape Town, Jan–Dec 2024



5. Average Length of Stay and Repeat Visitors

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

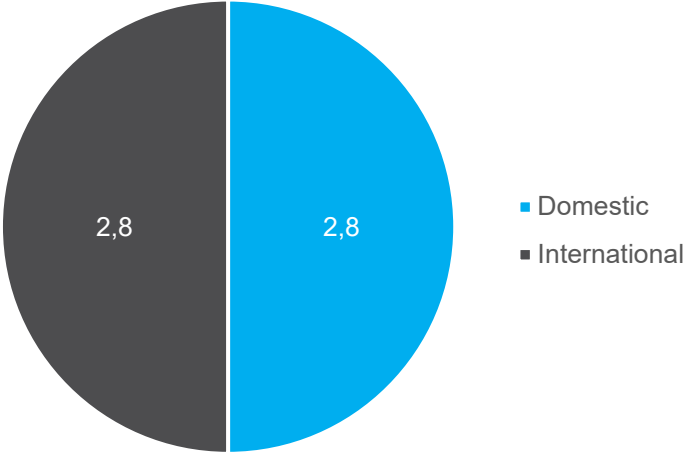
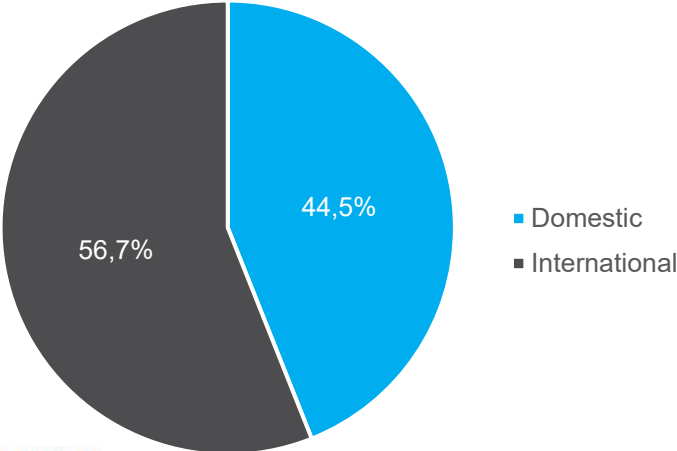


Figure 5: Repeat visits to Cape Town, Jan–Dec 2024



- On average, both domestic and international tourists spent 2.8 days in Cape Town. This information is based on the data analysed between January and December 2024 which highlights tourists' average length of stay in Cape Town. This is reflected in Figure 4.
- The data showed that 56.7% of international and 44.5% of domestic 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 39.5% of domestic tourists and 36.0% of international tourists visited Cape Town for just one day (Figure 6).
- The mobile data also provided information about tourists' average length of stay in the region by month, as shown in Figure 7. Domestic tourists stayed on average between 3.0 to 3.3 days during the months of January and June. International tourists stayed on average for 3.0 to 3.3 days in January, June, and December.

6. Average Length of Stay in Cape Town

Figure 6: Average length of stay (Number of days) in Cape Town, Jan–Dec 2024

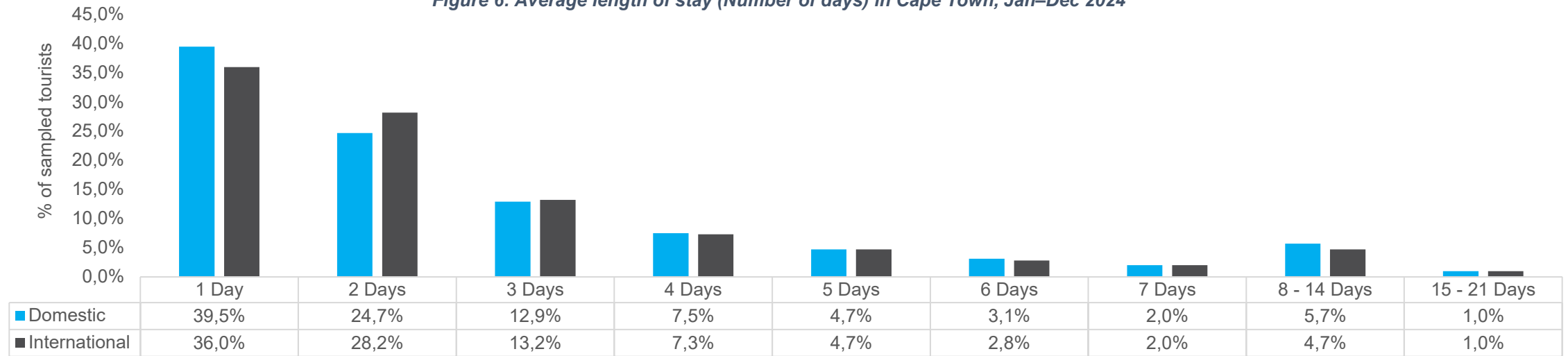
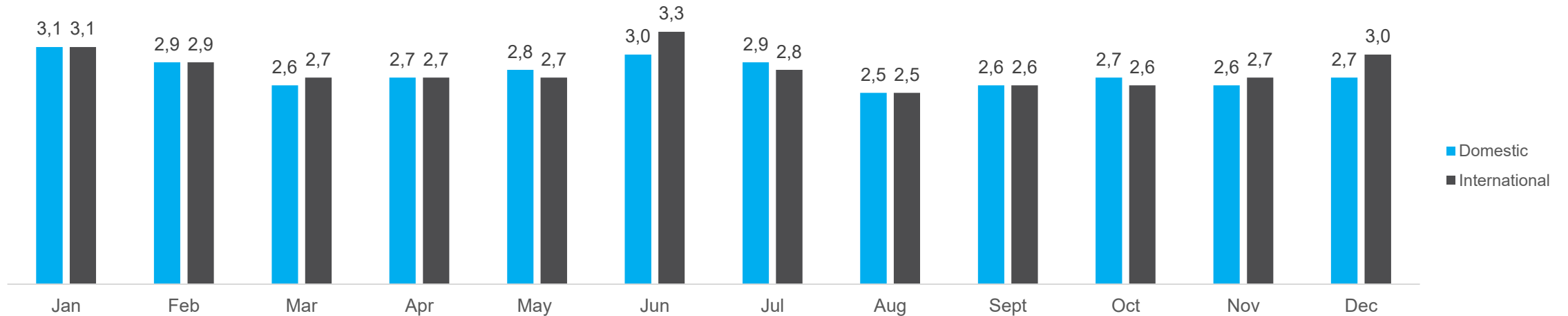
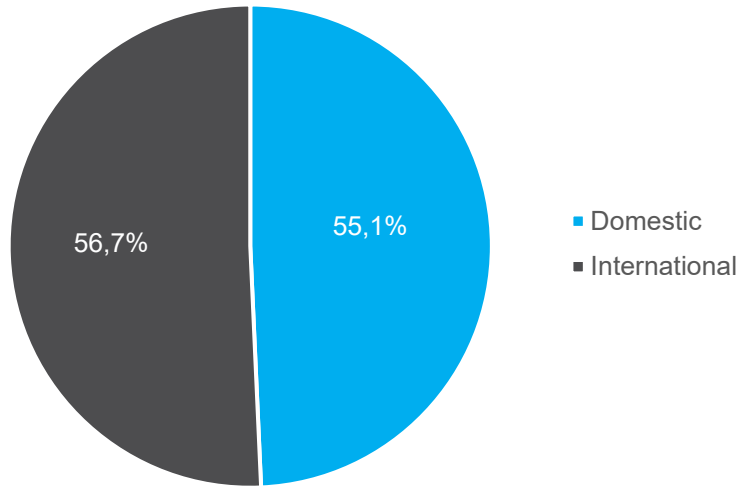


Figure 7: Average length of stay in the region by month, Jan–Dec 2024



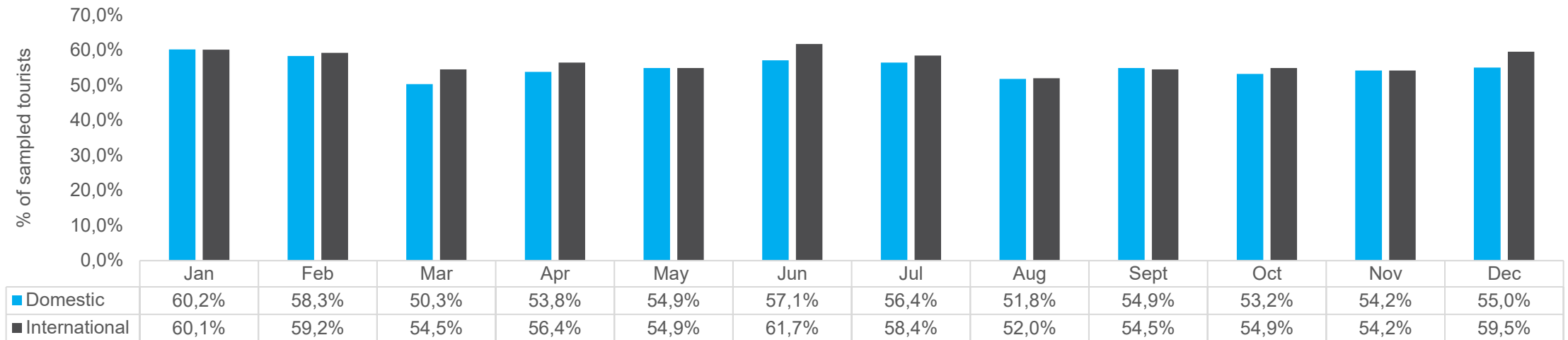
7. Overnight Stays: Trends in Cape Town

Figure 8: Overnight stay in Cape Town, Jan–Dec 2024



- Nearly 60% of sampled international and domestic tourists preferred to stay overnight in Cape Town. This can be observed in Figure 8.
- January emerged as the peak month for overnight stays among both domestic and international tourists in the region, as illustrated in Figure 9. In addition, it is noteworthy that Cape Town experienced a steady distribution of overnight stays from both domestic and international visitors across the entire year.

Figure 9: Overnight stay in Cape Town by month, Jan–Dec 2024



8. Popular Arrival and Departure Days

- Figures 10 and 11 indicate that domestic visitors opted to begin their stay on a Thursday, possibly to take advantage of the weekend that follows. On the other hand, Friday has been identified as the most popular day for departures from the city.
- Interestingly, when examining the behaviour of international tourists, a different pattern emerges: Sunday was highlighted as the favoured day for arrival and Friday as the day of departure. This preference could be attributed to several factors, such as longer travel itineraries or the desire to experience a full weekend in Cape Town.

Figure 10: Popular arrival days of the week in Cape Town, Jan–Dec 2024

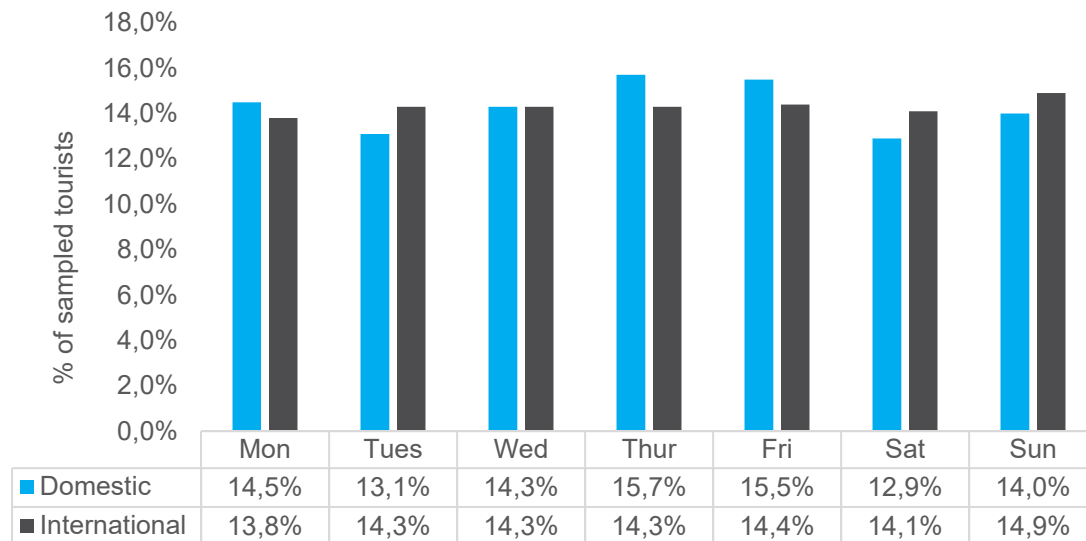
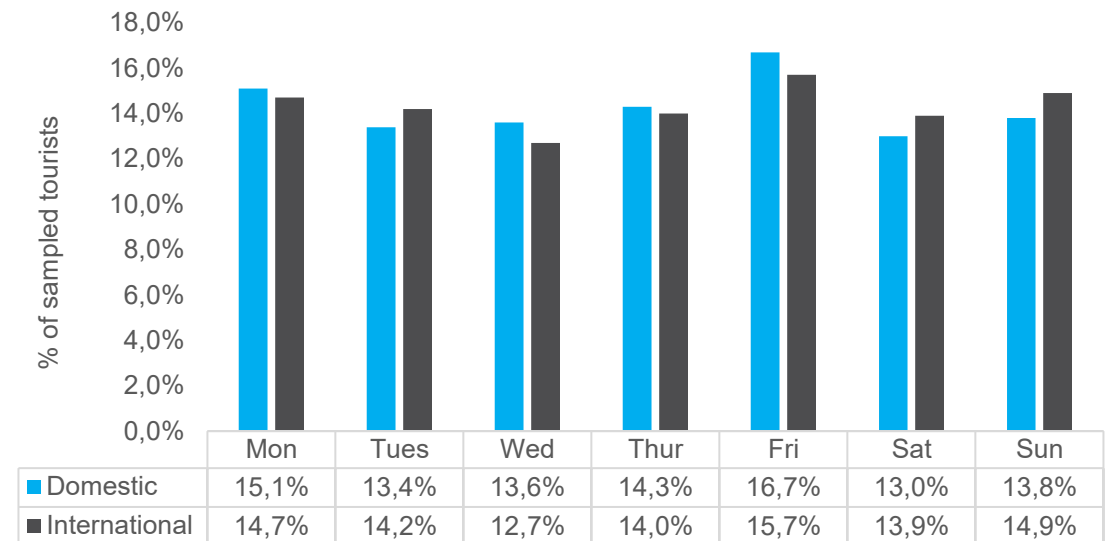


Figure 11: Popular departure days of the week from Cape Town, Jan–Dec 2024



Source: Rove (2025)

An aerial photograph of a coastline. In the foreground, the ocean is a deep blue with white foam from a boat's wake. The middle ground shows a series of mountains and hills, with a prominent, sharp peak on the left. The background is a hazy, light blue sky. The overall scene is bright and clear.

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?

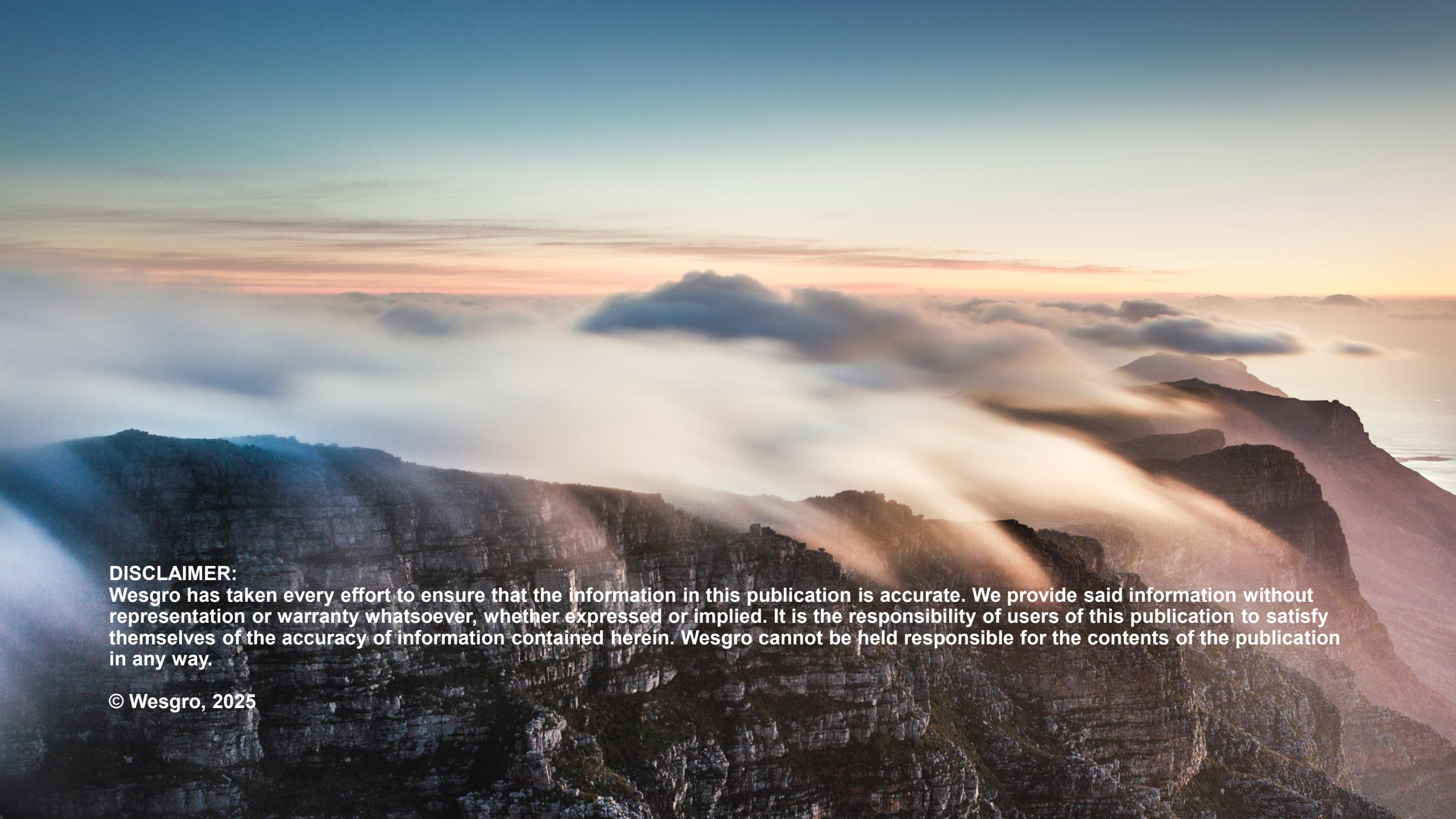
- A tourist is typically defined as follows:
 - A visitor who does not live or work within the study geography
 - A visitor who travels a minimum distance to the study geography
 - A visitor who appears in the study geography for a minimum period of time (exclude commuters/passers through, etc.)

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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