



Cape Town Tourism Visitor Trends

January to June 2025

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1. About this Report

This report is based on tourism destination insights from ROVE. This is a mobile location data insight dashboard, designed to uncover actionable insights about tourist visitation patterns, tourist origin markets, location affinity, times and duration of visits, and tourist demographics.

The report details insights from the dashboard regarding the city of Cape Town for the period between January and June 2025. The mobile location data was used to analyse the travel behaviour of tourists visiting Cape Town.



Image source: Wesgro (2025)

2. Key Insights

Rove mobile location data was used from January to June 2025 to gain insights into the travel behaviour of domestic and international tourists visiting the Cape Town region. The following findings were observed:

Domestic tourists:

- Mobile location data offered valuable insights into the travel patterns of 163,342 domestic tourists who visited Cape Town between January and June 2025. The majority of these tourists were from key municipalities, including Johannesburg, Nelson Mandela Bay, Tshwane, Ekurhuleni and Saldanha Bay.
- The average length of stay for domestic tourists in Cape Town was 2.7 days. Notably, 52.00% of domestic tourists were repeat visitors, suggesting a strong level of satisfaction and loyalty to the destination. A closer look at the data revealed that 37.90% of the visitors chose to stay for only a single day. The duration of stay fluctuated between 2.2 and 3.2 days, indicating a relatively even distribution of overnight visits between the months of January and June 2025.
- In addition, 57.40% of domestic tourists opted to stay overnight in the city, and this preference exhibited a steady distribution of overnight stays between January and June 2025. An analysis of arrival and departure trends indicated that Thursday was the most popular day for tourists to arrive, while Friday was the favoured day for their departure.

International tourists:

- Mobile location data provided valuable insights into the travel patterns of 5,777 international tourists who explored the diverse landscapes and attractions of Cape Town. A share of visitors originated from countries such as the United States, Namibia, India, Australia and Canada.
- On average, international tourists spent approximately 2.9 days in Cape Town, with 31.50% indicating they had visited the city in the past, suggesting a level of repeat interest and satisfaction with their experiences. Interestingly, 32.80% of tourists opted to stay for two days in the city.
- The average length of stay during the first half of 2025 ranged from 2.7 days to 3.2 days. Furthermore, 62.50% of international tourists chose to stay overnight, with 66.30% of these visitors staying overnight in Cape Town in March 2025.
- An analysis of arrival and departure patterns revealed that Thursday was the favoured day of arrival and Friday was the most popular day of departure.

3. 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.



Visitor Trends in Cape Town

Mobile Location Data Insights

4. Cape Town Mobile Location Data Insights: Sample Size

- The insights in this report represent mobile location data from a sample of 163,342 domestic tourists and 5,777 international tourists who visited Cape Town between January and June 2025. This is illustrated in Figure 1.
- Figure 2 shows that a significant portion of domestic visitors to Cape Town came from urban centers in South Africa. Johannesburg was the leading source market with 19,856 visitors, followed by Nelson Mandela Bay (13,520), Tshwane (11,207), Ekurhuleni (10,218), and Saldanha Bay (9,335), highlighting Cape Town's appeal to a diverse national audience.

Figure 1: Sample size of tourists visiting Cape Town, January–June 2025

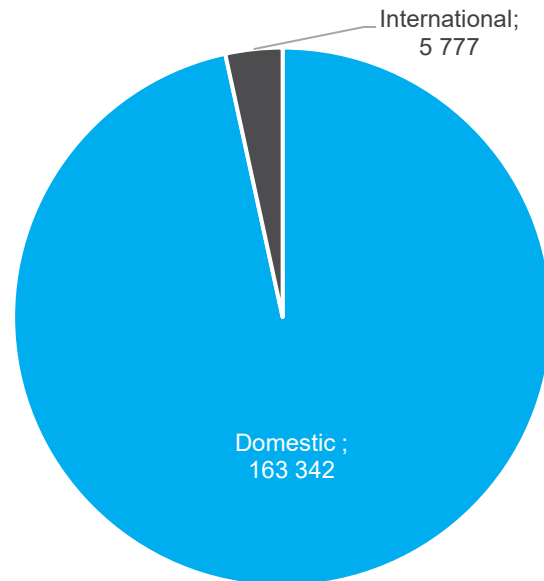
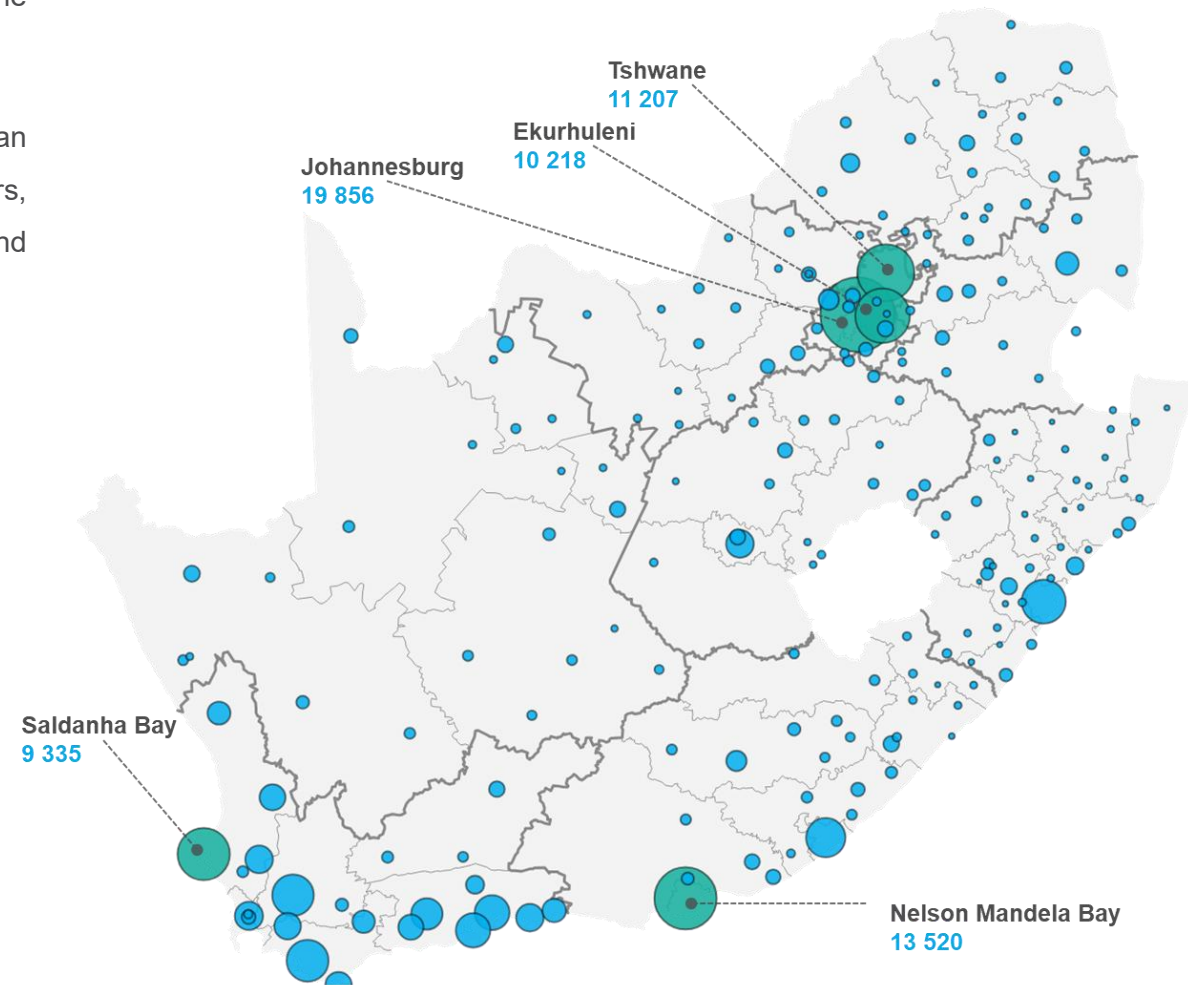


Figure 2: Municipalities of origin for domestic tourists visiting Cape Town, January–June 2025



4. Cape Town Mobile Location Data Insights: Sample Size

- In the sample of 5,777 international tourists, 33.81% came from the USA. Following the USA, 5.07% of the tourists were from Namibia, 5.00% from India, and 4.64% from Australia. Lastly, 3.65% of the tourists came from Canada. This can be seen in Figure 3.

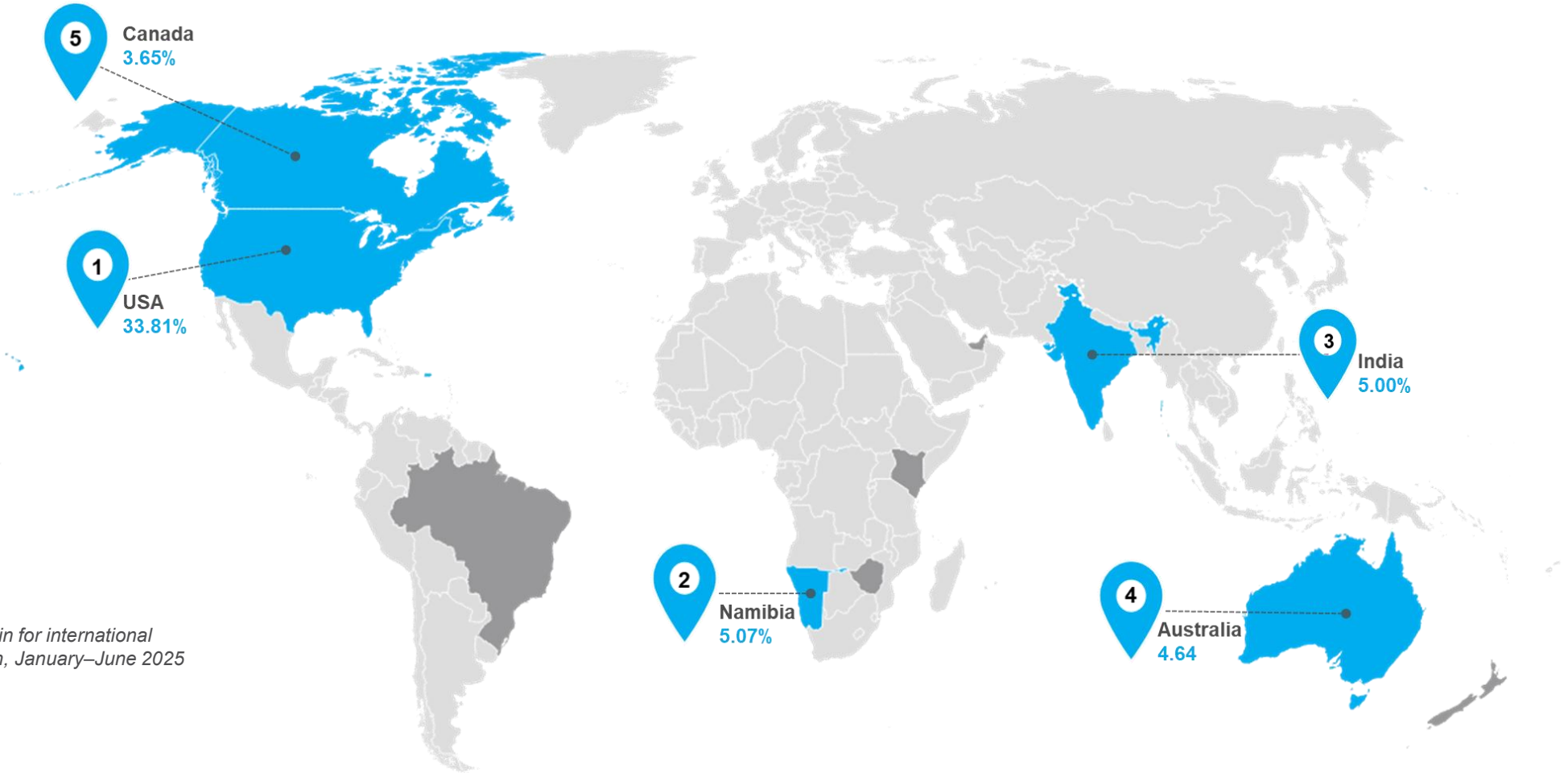


Figure 3: Countries of origin for international tourists visiting Cape Town, January–June 2025

4. Average Length of Stay and Repeat Visitors

- On average, international tourists spent 2.9 days in Cape Town, while domestic tourists spent 2.7 days in the City. This information is based on data analysed between January and June 2025, which highlights the average length of stay for tourists in the region. This is reflected in Figure 4.
- The data showed that 52.00% of domestic tourists and 31.50% of international tourists were repeat visitors to the city, as shown in Figure 5. This indicates that the city is a popular destination among tourists, who often choose to return for subsequent visits.
- However, findings also indicated that 37.90% of domestic tourists spent one day, and 28.40% of tourists spent two days in the city. Approximately 32.80% of international visitors spent two days, and 30.20% of visitors spent one day (Figure 6). Overall, tourists stayed for an average of three days in the city between January and June 2025.
- The mobile data also provided information about tourists' average length of stay in the city by month, as shown in Figure 7. International tourists stayed on average between 3.1 and 3.2 days during the months of February and March 2025. Domestic tourists stayed on average for 3.0 to 3.2 days in February and March 2025.

Figure 4: Average length of stay (LOS), January–June 2025

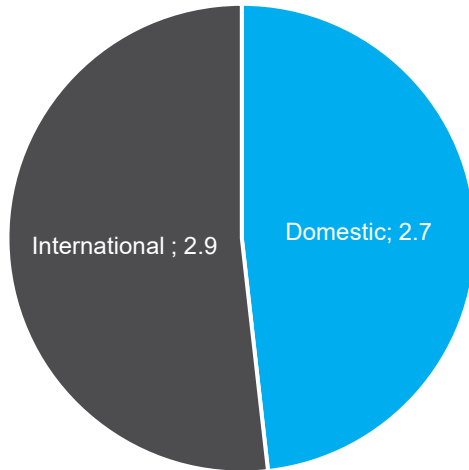
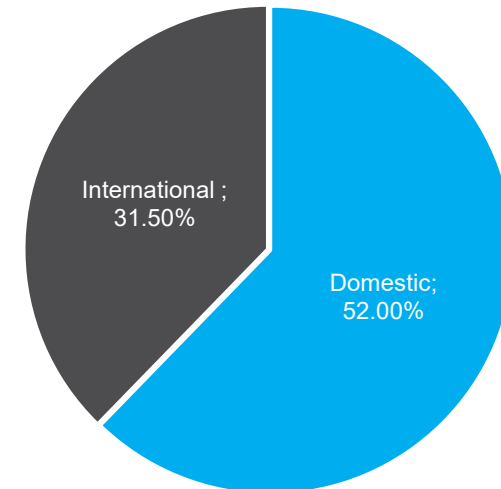


Figure 5: Repeat visitor to Cape Town, January–June 2025



4. Average Length of Stay in Cape Town

Figure 6: Average length of stay (number of days) in Cape Town, January–June 2025

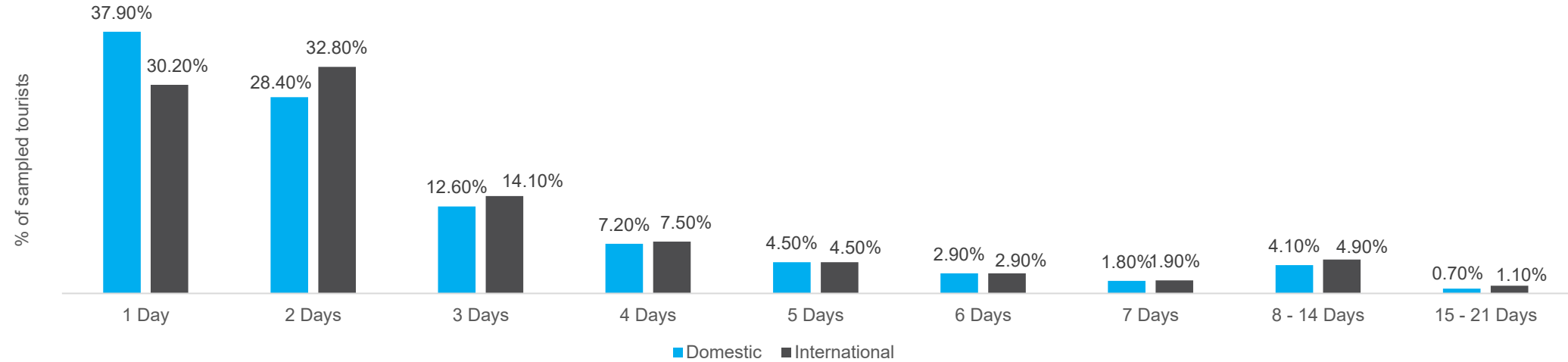
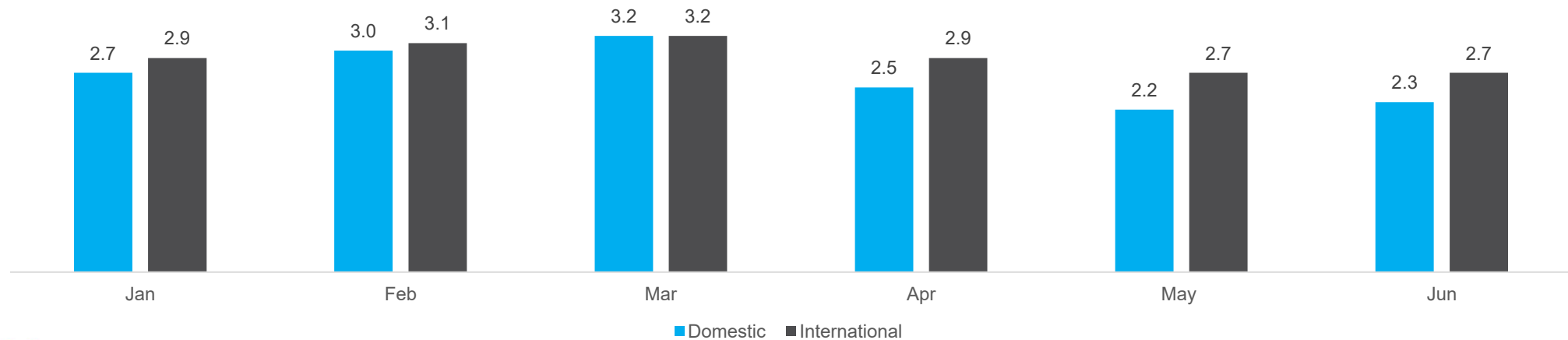
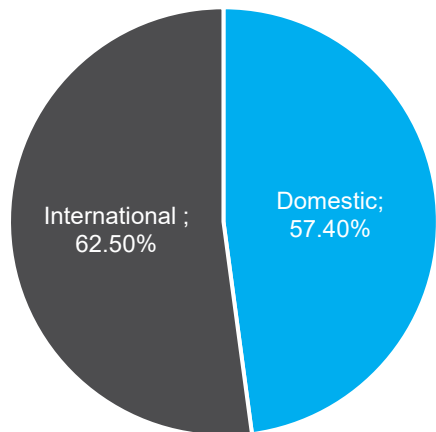


Figure 7: Average length of stay in the city by month, January–June 2025



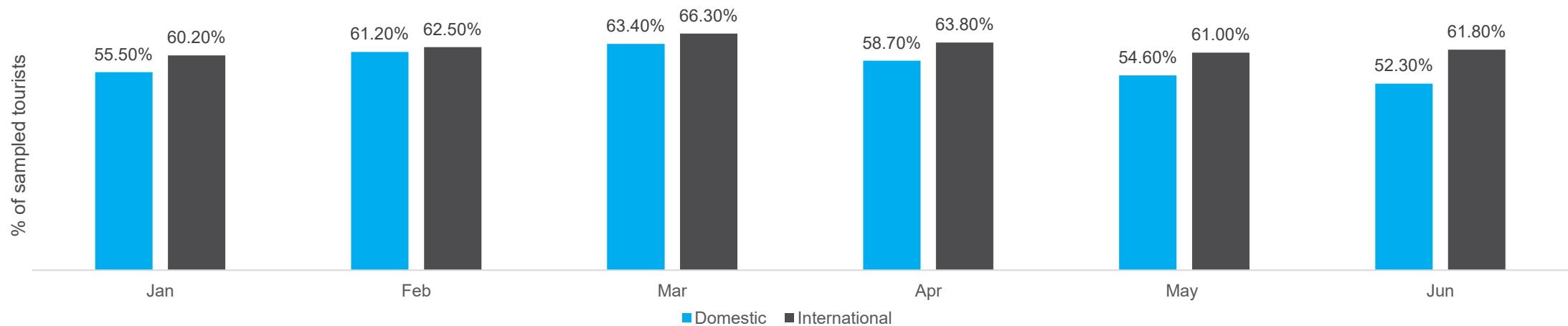
4. Overnight Stays: Trends in Cape Town

Figure 8: Overnight stays in Cape Town, January–June 2025



- Over 60% of sampled international tourists and 57.40% of domestic tourists preferred to stay overnight in Cape Town. This can be observed in Figure 8.
- March emerged as the peak month for overnight stays in the city for international and domestic tourists, as illustrated in Figure 9. In addition, there was a relatively fair seasonal spread for both domestic and international visitors between January and June 2025.

Figure 9: Overnight stays in Cape Town by month, January–June 2025



4. Popular Arrival and Departure Days

- Figures 10 and 11 indicate that domestic visitors opted to begin their stay on a Thursday, and that Friday was the most popular day for departures from the city. Interestingly, when looking at the behaviour of international tourists, a similar pattern emerges: Thursday was highlighted as the favoured day for arrival and Friday as the most popular day of departure.
- The overall trend of popular arrival days and departure days shows a positive correlation with the percentage of domestic and international visitors who spent one to two days in Cape Town.

Figure 10: Popular arrival days of the week in Cape Town, January–June 2025

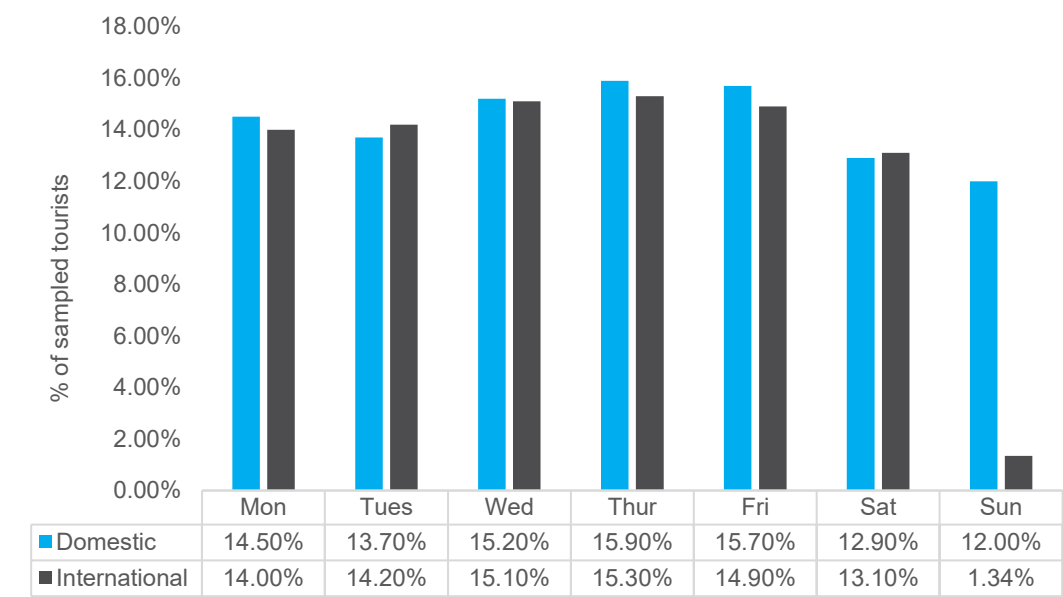
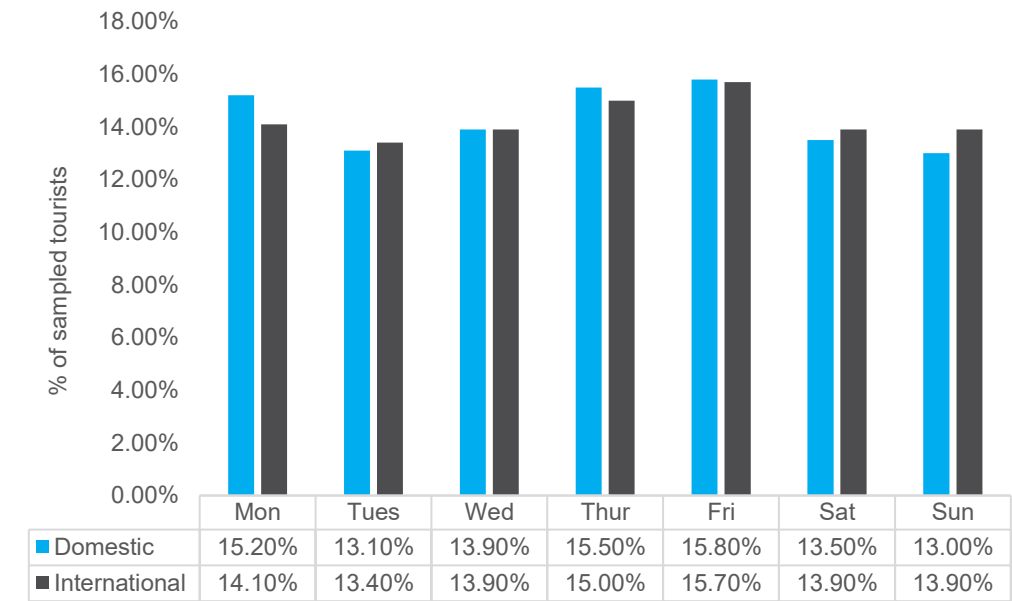
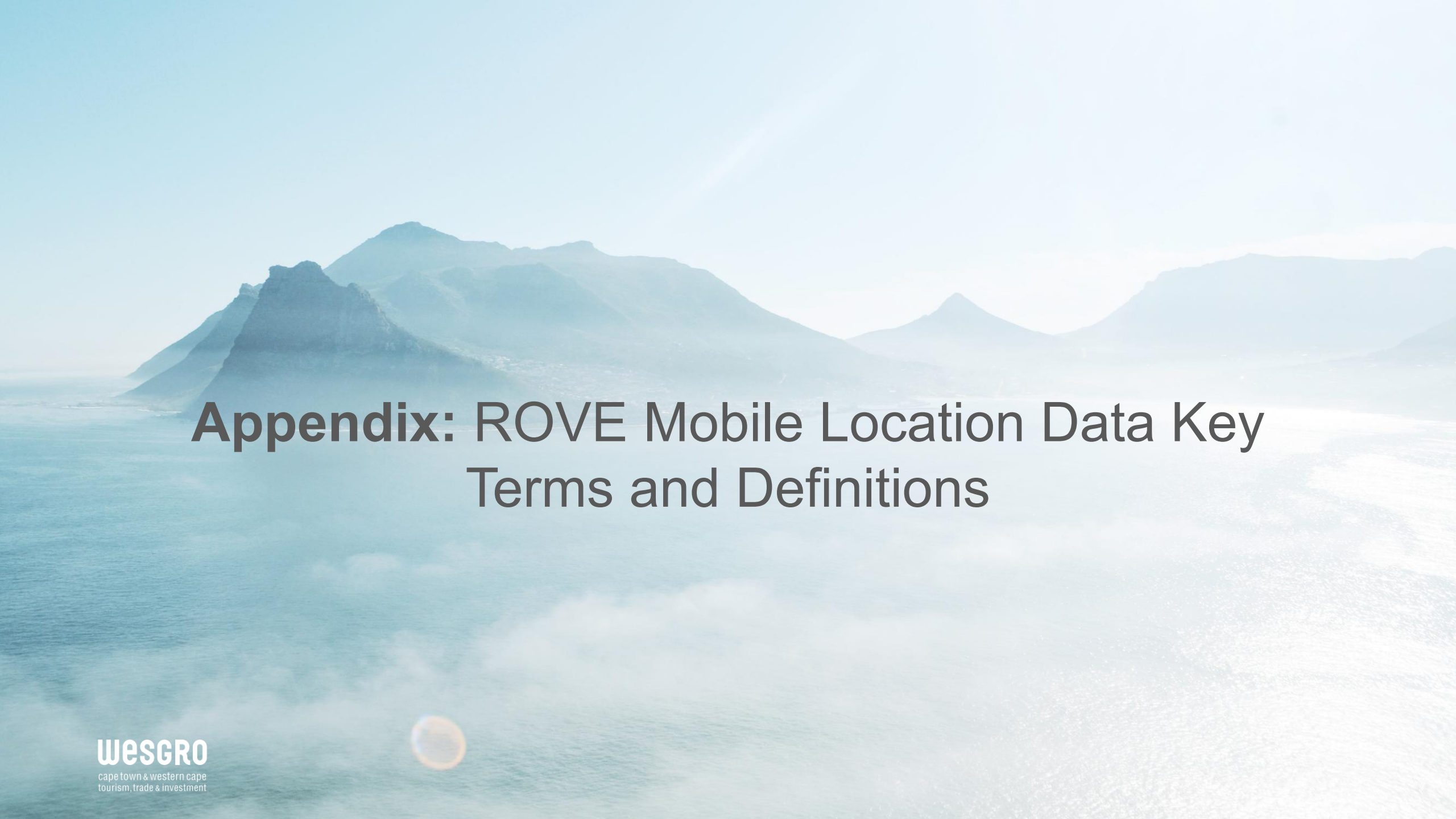


Figure 11: Popular departure days of the week from Cape Town, January–June 2025



A scenic view of a coastline with mountains and the ocean. The foreground shows the ocean with white foam from a boat's wake. In the middle ground, there are several mountain peaks, some with green vegetation. The sky is a pale blue with some light clouds. The overall tone is bright and airy.

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: - 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: - 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: - 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?	
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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