



Cape Town Regional Trends

WESGRO
cape town & western cape
research

Jan-Dec 2021

An inspiring place to know

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1. Executive Summary

- The attractions highlighted in this report collectively welcomed a total of 2,187,027 visitors between January and December 2021. Based on visitor numbers in 2019, recovery has been between 20% and 30% amongst most of the attractions, with the exception of Kirstenbosch National Botanical Garden which recovered to over 50% for the year.
- The 2021 year to date occupancy for Cape Town reached 31,9% compared to 35,9% in 2020 (11,1% decline). In spite of the annual decline, a positive growth was seen in the Cape Town 4 star (2%) and Northern Cape Town (12,7%) occupancy levels for 2021.
- Domestic arrivals through Cape Town International Airport grew by 35% y-o-y in 2021 and reached its peak at 270 408 passengers in December 2021. Y-o-y growth of 897% in June is largely due to hard lockdown measures having only eased since June 2020.
- International arrivals declined by 38.5% in 2021, reaching a total of 230 390 passengers compared to 374 555 in 2020. This decline can be attributed to travel restrictions from key source markets.
- This report includes an overview of the Tourism Sentiment Index (TSI) recorded between January and December 2021. Over the period under review, the Tourism Sentiment in Cape Town was driven by positive conversations around beaches, restaurants and dining experiences, while the negative sentiments revolved around natural disasters and accommodation.
- The top three sentiment categories that emerged for Cape Town with respect to volume was outdoor activities, food + culinary and destination services. Conversations around all sentiment categories were positive, apart from safety which brought on a more negative tone. Amenities + entertainment and relaxation + wellness was the categories that achieved the highest score at 33 respectively.
- Additional insights in this report includes mobile location data from a sample of 161,125 domestic and 4,356 international tourists who visited Cape Town between January and December 2021.
- On average, domestic tourists stayed in Cape Town for 2,7 days while the international tourists stayed slightly longer at 3,1 days. 66,9% of the sampled international tourists and 62,2% of domestic tourists stayed overnight in Cape Town.
- Cape Town saw most of its repeat visits from the domestic tourists (43,2%) and 29,8% of international tourists visited Cape Town before.
- Attractions (71,5%) ranked as the top point of interest among the domestic sampled tourists. Shopping & markets (34,0%), Natural attractions (22,2%) and roadway or walkway were among the most popular activities undertaken in Cape Town. 8 out of the top 15 points of interests enjoyed by the domestic tourists were located in Cape Town, of which the top 3 included the V&A Waterfront Precinct, Table Mountain and the Cape Town restaurants and bars.
- Close to 80% of the international sampled tourists enjoyed visiting attractions in Cape Town. Their top preferences included shopping and markets (39,6%), natural attractions (25,3%) and bars & pubs (12,2%). Out of the top 15 points of interests visited in 2021, the top 5 visited by the international tourists were located in Cape Town which included the V&A Waterfront, Table Mountain, Cape Town restaurants and bars, Cape Point and Willowbridge & Tygervalley.



Performance of Cape Town Attractions:
January-December 2021

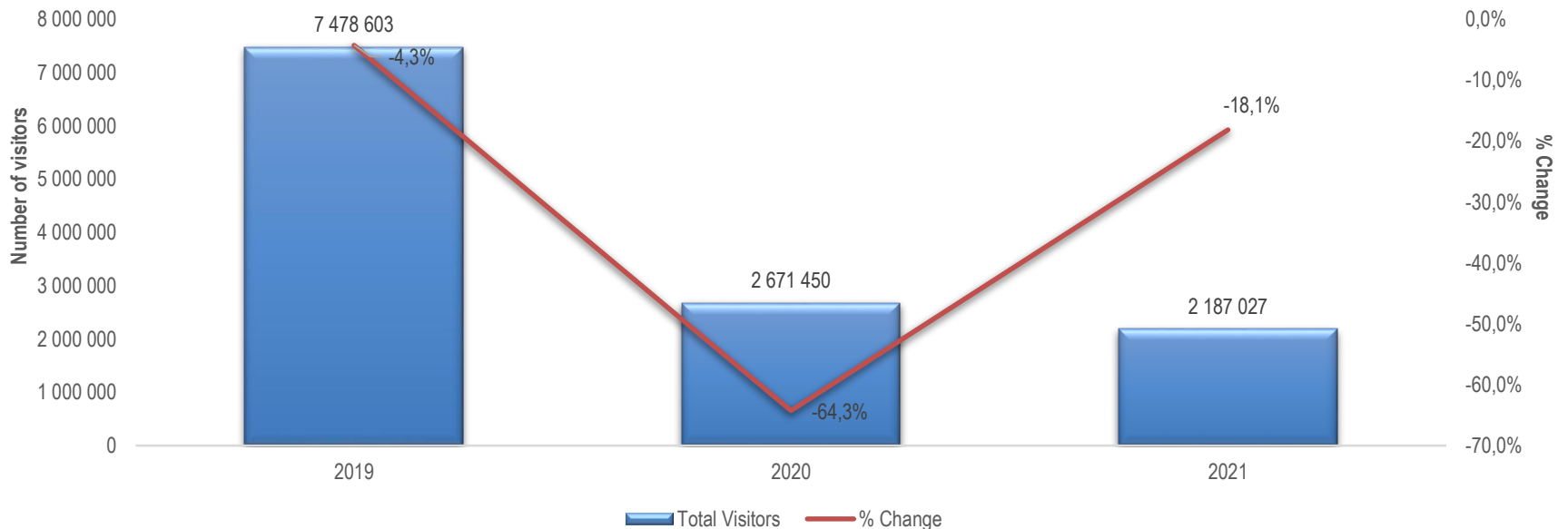
2. Performance of Cape Town Attractions

Attraction	Total Visitors Jan-Dec 2021	% Recovery based on 2019
Kirstenbosch	506 639	55,0%
Table Mountain Aerial Cableway	292 968	26,6%
Table Mountain National Park	889 199	27,9%
Table Mountain National Park: Boulders	166 537	20,3%
Table Mountain National Park: Cape of Good Hope	275 433	24,2%
Robben Island	56 251	17,8%

Sources: Table Mountain National Park, SANParks, Table Mountain Aerial Cableway, Robben Island, and Kirstenbosch National Botanical Garden, 2022

- For this section, visitor movement to Cape Town's top attractions were reviewed. These include the city's most iconic attractions for which visitor statistics were available.
- Between January and December 2021 the Cape Town attractions included in this report reached a total of 2,187,027 visitors.
- Based on visitor numbers between January and December 2019, recovery reached between 20% and 30% for most attractions over the same period in 2021, apart from Robben Island which only recovered to 17,8%. Kirstenbosch reached the highest recovery rate at 55,0%.

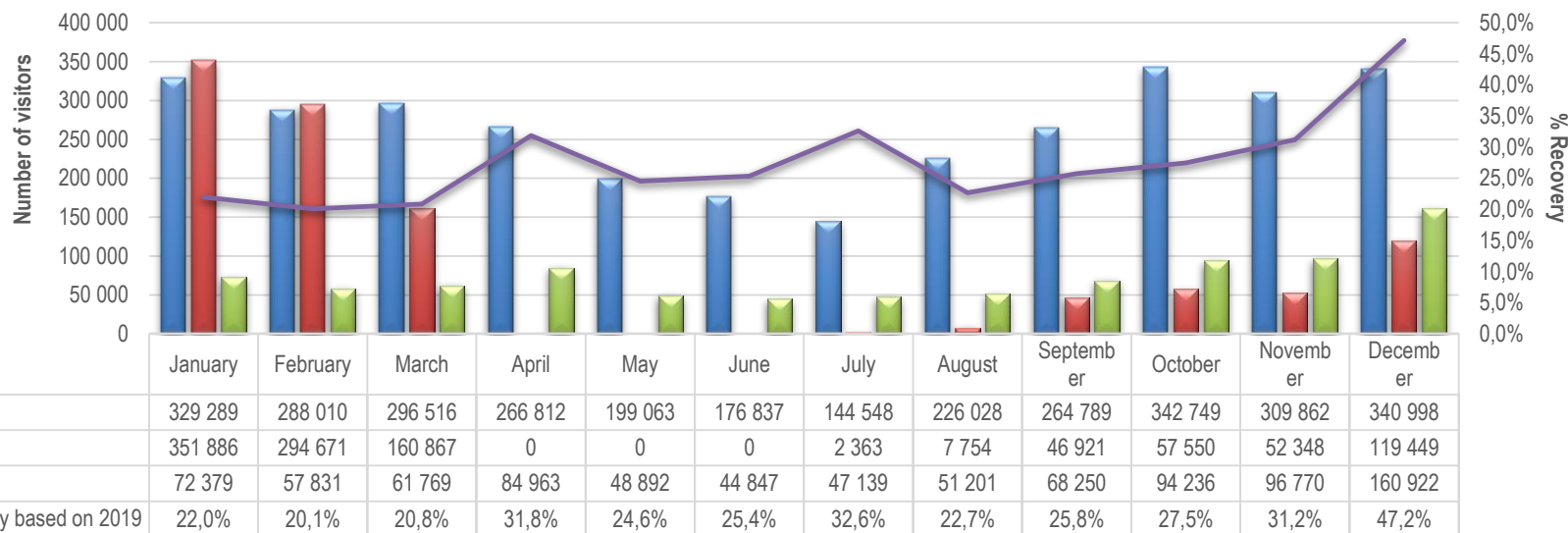
VISITORS TO PARTICIPATING CAPE TOWN ATTRACTIONS, 2019-2021



Sources: Table Mountain National Park, SANParks, Table Mountain Aerial Cableway, Kirstenbosch National Botanical Garden and Robben Island, 2022

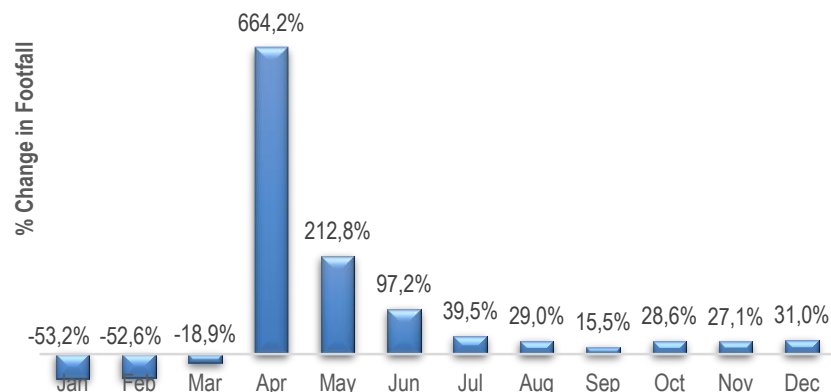
2. Performance of Cape Town Attractions

VISITORS TO TABLE MOUNTAIN NATIONAL PARK, JAN-DEC 2019-2021



Source: SANParks, 2022

Y-O-Y % CHANGE IN FOOTFALL TO THE V&A WATERFRONT, JAN-DEC 2021



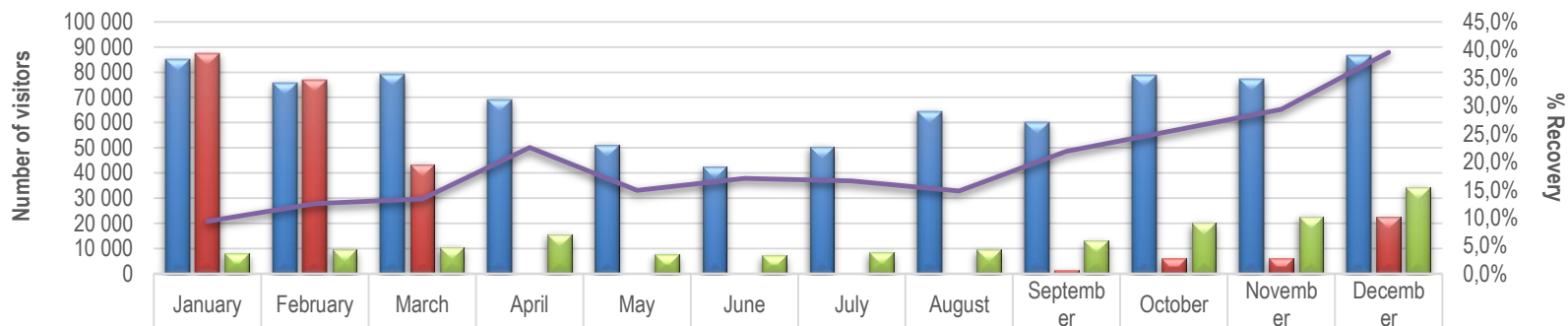
Source: V&A Waterfront, 2022

- Table Mountain National Park welcomed 889,199 visitors between January and December 2021. Based on 2019 visitor levels, the park recorded a recovery rate of 28%.
- When observing the year-on-year growth in footfall to the V&A Waterfront, the shopping centre also felt the effects associated with COVID-19. A decline of slightly over 50% was experienced in January and February 2021 respectively.
- The more positive performance experienced in April 2021 for the V&A was driven by the Easter weekend in the first part of the month, as well as Freedom Day falling on a mid-week day. Furthermore, hard lockdown measures were also implemented between April and May 2020 which contributed to the high increase in 2021.
- In addition, government schools were also on holiday for the last week of the month and the shopping centre generally benefits when kids are not at school and looking for activities.

2. Performance of Cape Town Attractions

- Between January and December 2021, Boulders attracted 166,537 visitors and recorded the highest number in December (34,228) and November (22,620). The maximum recovery in visitor levels was also experienced in December (39,5%). Similarly, the Cape of Good Hope also recorded the highest number of visitors in December (38,316). Recovery was the strongest in June (35,6%) and December (32,8%).

VISITORS TO TABLE MOUNTAIN NATIONAL PARK: BOULDERS, JAN-DEC 2019-2021



	January	February	March	April	May	June	July	August	September	October	November	December
2019	85 231	75 768	79 070	69 257	51 195	42 326	50 492	64 383	60 222	78 749	77 106	86 552
2020	87 220	77 009	43 356	0	0	0	0	0	1 396	5 893	6 047	22 489
2021	7 969	9 511	10 566	15 600	7 612	7 213	8 375	9 514	13 164	20 165	22 620	34 228
% Recovery based on 2019	9,3%	12,6%	13,4%	22,5%	14,9%	17,0%	16,6%	14,8%	21,9%	25,6%	29,3%	39,5%

VISITORS TO TABLE MOUNTAIN NATIONAL PARK: CAPE OF GOOD HOPE, JAN-DEC 2019-2021

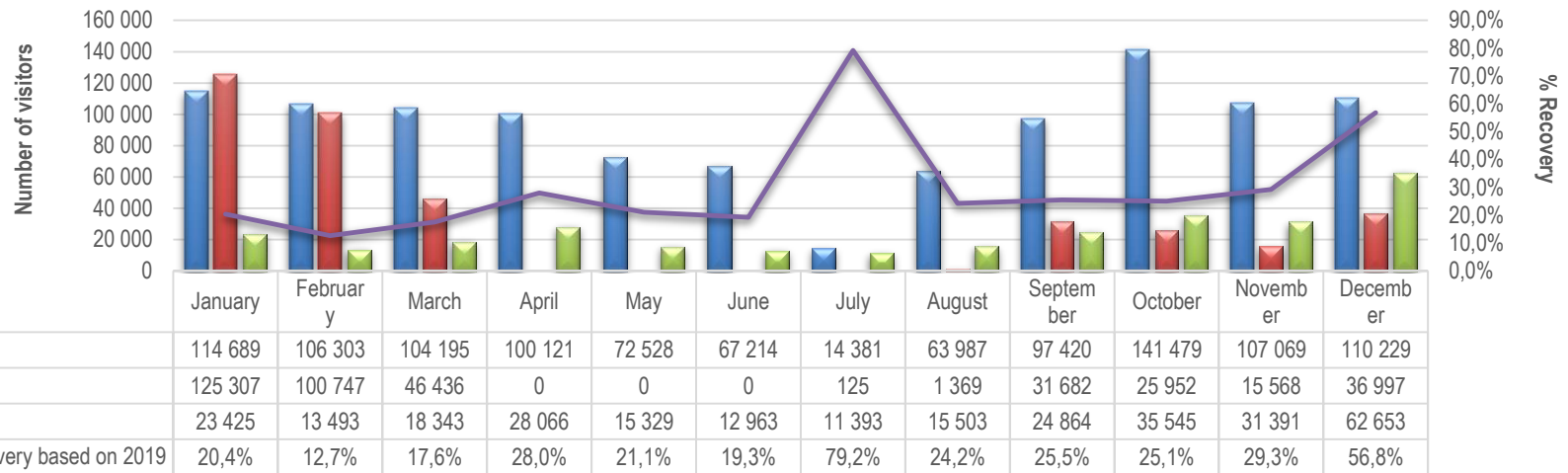


	January	February	March	April	May	June	July	August	September	October	November	December
2019	113 416	96 233	101 445	91 644	69 085	60 755	73 583	92 520	96 458	111 883	111 942	116 930
2020	117 765	101 318	58 607	0	0	0	2 238	6 385	11 380	13 201	16 941	35 812
2021	26 614	17 001	19 488	25 789	16 327	21 635	17 467	17 000	20 436	28 472	26 888	38 316
% Recovery based on 2019	23,5%	17,7%	19,2%	28,1%	23,6%	35,6%	23,7%	18,4%	21,2%	25,4%	24,0%	32,8%

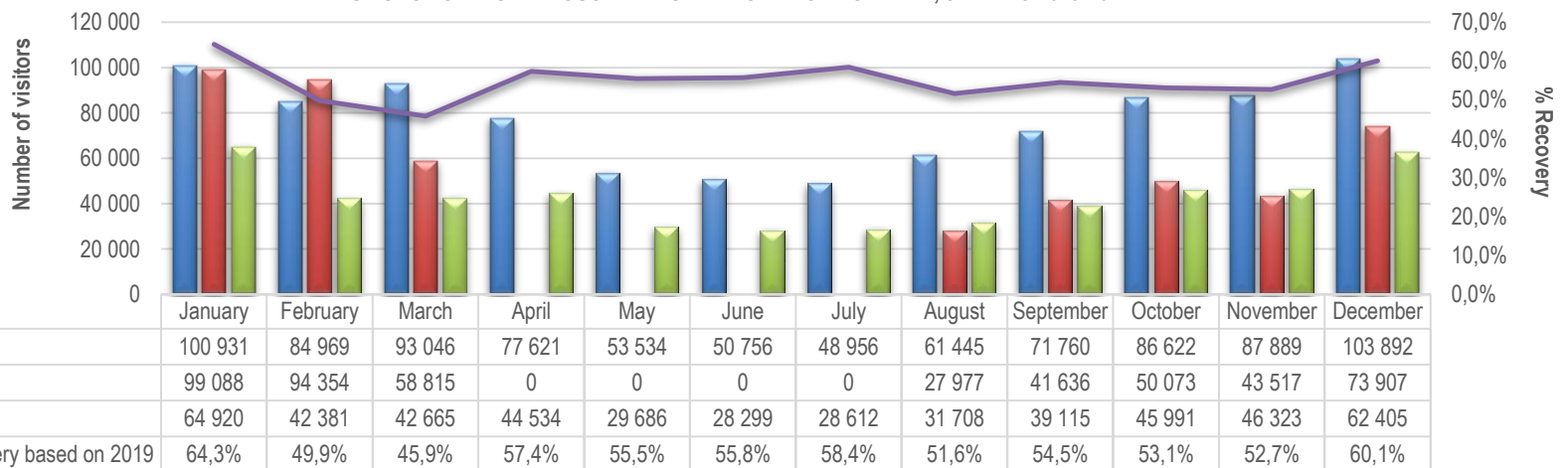
2. Performance of Cape Town Attractions

- Table Mountain Aerial Cableway welcomed a total of 292,968 visitors in 2021. December ranked as the strongest month with respect to visitor numbers (62,653) and the highest (79,2%) recovery was reached in July. Kirstenbosch welcomed over half a million visitors between January and December 2021. January (64,920) and December (62,405) saw the highest number in visitors and also reached the strongest recovery rate of over 60% when compared to 2019.

VISITORS TO TABLE MOUNTAIN AERIAL CABLEWAY, JAN-DEC 2019-2021



VISITORS TO KIRSTENBOSCH NATIONAL BOTANICAL GARDEN, JAN-DEC 2019-2021

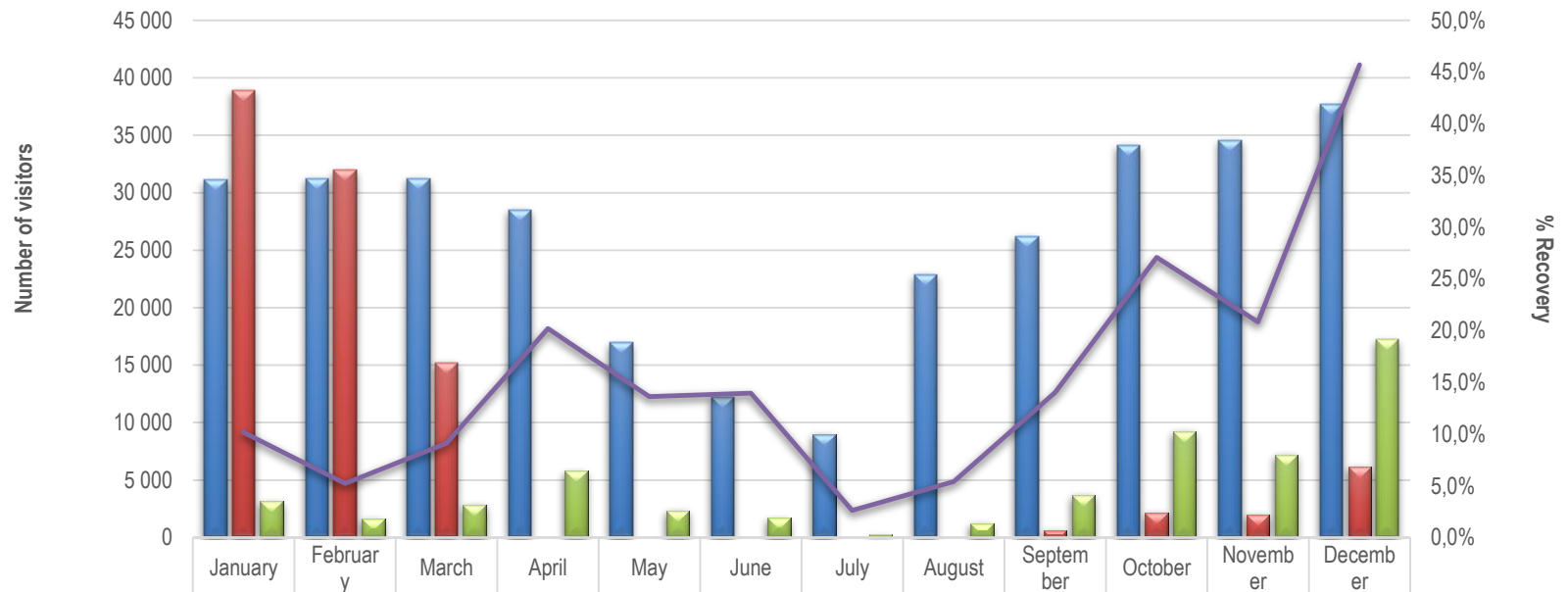


Sources: Kirstenbosch National Botanical Garden and Table Mountain Aerial Cableway, 2022

2. Performance of Cape Town Attractions

- Between January and December 2021, Robben Island welcomed a total of 56,251 visitors and reached the highest recovery rate in December (45,7%). The iconic attraction was closed during the nationwide lockdown period and recorded no visitors between April and August 2020. When observing 2019 visitor levels, recovery has been slower than anticipated, however, the month of December not only recovered to almost 50% of its 2019 figure but also reflected the highest volume of visitors since the reopening in September 2020.

VISITORS TO ROBBEN ISLAND, JAN-DEC 2019-2021



2019	31 111	31 248	31 250	28 530	16 976	12 239	8 980	22 910	26 183	34 140	34 574	37 680
2020	38 926	31 964	15 197	0	0	0	0	0	635	2 143	1 994	6 175
2021	3 161	1 631	2 850	5 763	2 315	1 709	236	1 241	3 674	9 245	7 201	17 225
% Recovery based on 2019	10,2%	5,2%	9,1%	20,2%	13,6%	14,0%	2,6%	5,4%	14,0%	27,1%	20,8%	45,7%

Source: Robben Island, 2022



Performance of Cape Town Hotel Sector:
January-December 2021

3. Performance of Cape Town's Hotel Sector

- The year to date occupancy percentage for Cape Town was 31.9% compared to 35.9% in 2020 (11.1% decline) and the revenue per average room was R446.60 compared to R661.94 in 2020 (32.5% decline).
- The Average Daily Rate (ADR) declined by 24%, going from R1,844.85 to R1,399.81.

Cape Town Region	Year to Date - December 2021 vs December 2020								
	Occ %		ADR		RevPAR		Percent Change from 2020		
	2021	2020	2021	2020	2021	2020	Occ	ADR	RevPAR
Cape Town+	31,9	35,9	1 399,81	1 844,85	446,60	661,94	-11,1	-24,1	-32,5
Cape Town 5 Stars+	29,0	40,0	2 243,01	3 372,19	649,59	1 349,89	-27,7	-33,5	-51,9
Cape Town 4 Stars+	36,6	35,9	1 010,73	1 388,38	369,56	497,88	2,0	-27,2	-25,8
Cape Town 3 Stars+	29,3	34,2	867,28	1 084,93	254,21	371,41	-14,4	-20,1	-31,6
Northern Cape Town+	41,4	36,7	843,25	969,90	349,09	356,15	12,7	-13,1	-2,0

Notes: STR Global Hotel data provides a high-level overview of occupancy (OCC), average daily rate (ADR) and revenue per available room (RevPAR) for key geographical areas within SA.
Source: STR Global, 2022

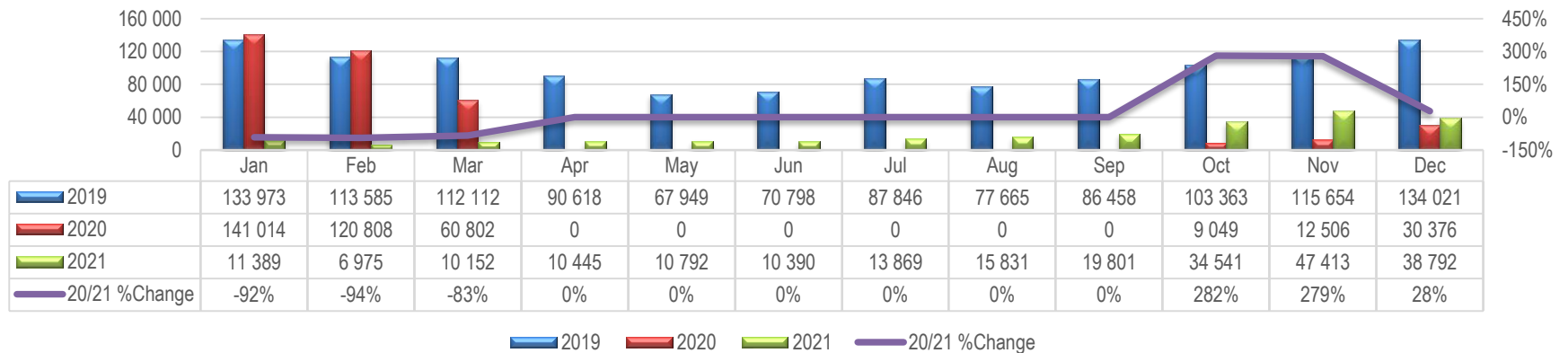


Cape Town International Airport Arrivals:
January-December 2021

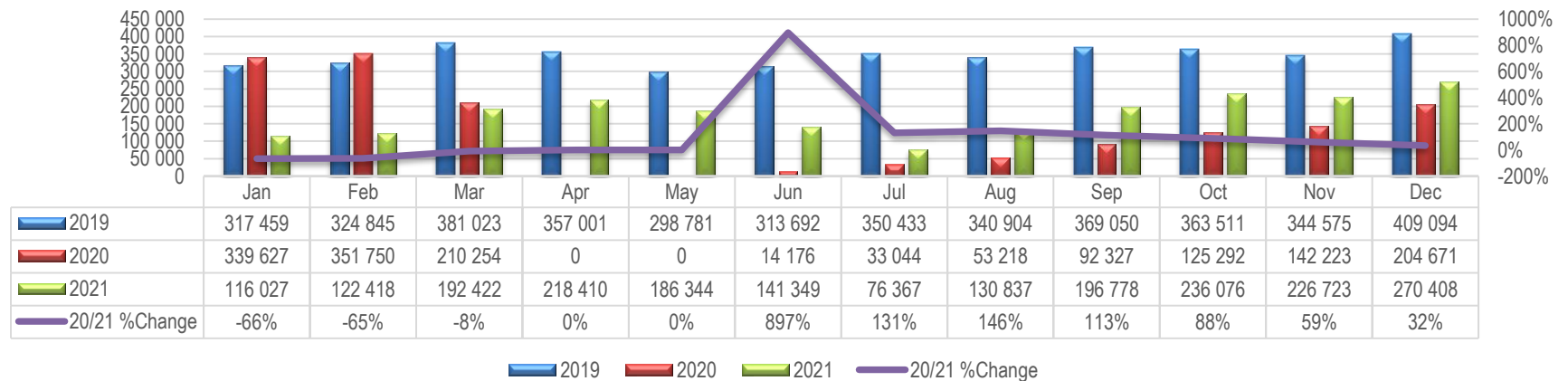
4. Cape Town International Airport Arrivals

- Domestic arrivals through Cape Town International Airport grew by 35% y-o-y in 2021 compared to 2020 and reached its peak at 270 408 passengers in December 2021. Y-o-y growth of 897% in June is largely due to domestic travel only re-opening at the end of June 2020.
- International arrivals declined by 38.5% in 2021, reaching a total of 230 390 passengers compared to 374 555 in 2020. This decline can be attributed to travel restrictions from key source markets throughout the year 2021. In addition, prior to the implementation of the nationwide lockdown in March 2020, January and February 2020 recorded the normal influx of international arrivals which contributed to the overall higher number of international passenger arrivals in 2020.

INTERNATIONAL PASSENGER ARRIVALS THROUGH THE CTIA, JAN - DEC 2019 - 2021



DOMESTIC PASSENGER ARRIVALS THROUGH THE CTIA, JAN - DEC 2019 - 2021

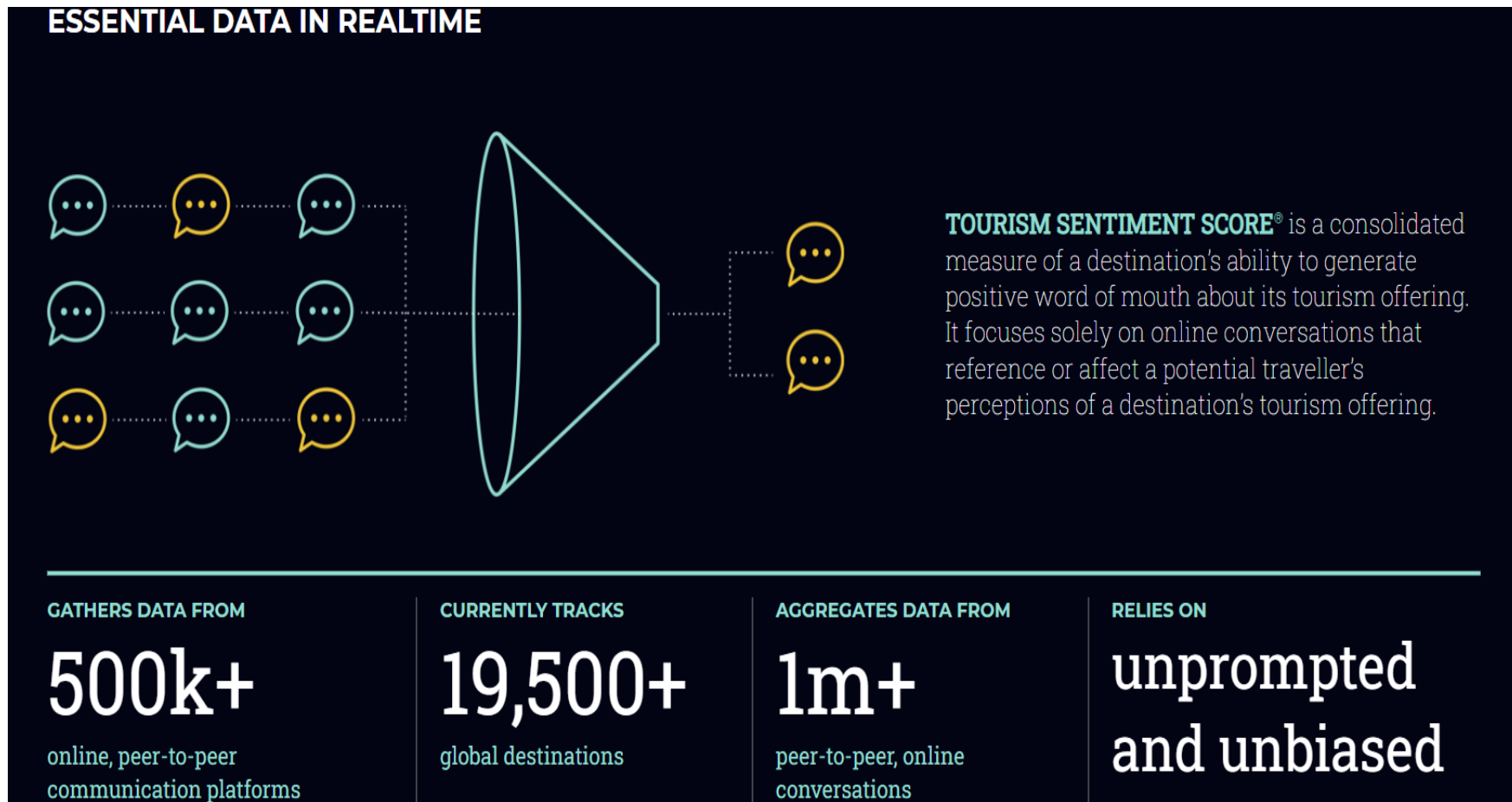




Tourism Sentiment in Cape Town:
January-December 2021

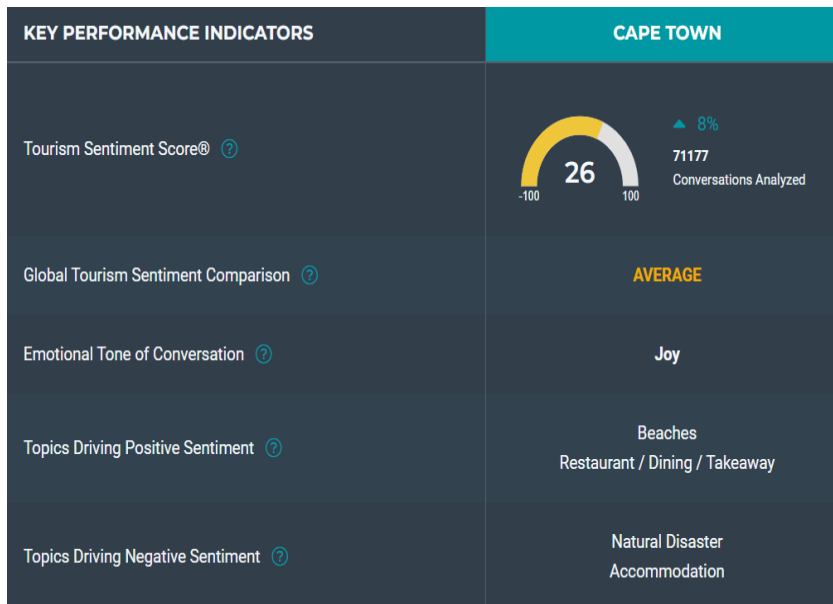
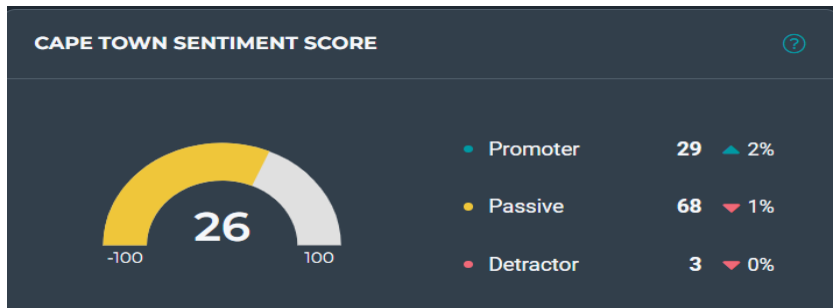
5. Tourism Sentiment in Cape Town

- In 2021 Wesgro attained the Tourism Sentiment Index (TSI) data package which provides a **Tourism Sentiment Score®** for Cape and the Western Cape.
- The sentiment score is a consolidated measure of a destination's ability to generate positive word of mouth about its tourism offering in real time. It focuses solely on online conversations that reference or affect a potential traveller's perceptions.



5. Tourism Sentiment in Cape Town

- Cape Town's Tourism Sentiment score is considered average at 26, compared to the rest of the world. Close to 30% of online conversations were actively recommending or speaking positively about the destination and 3% were discouraging or speaking negatively about Cape Town. The remaining (68%) spoke about the destination from an indifferent or passive point of view.
- Over the period January to December 2021, the Tourism Sentiment in Cape Town was driven by positive conversations around beaches, restaurants and dining experiences, while the negative sentiments revolved around natural disasters and accommodation.
- The top three sentiment categories that emerged for Cape Town with respect to volume was outdoor activities, food + culinary and destination services. As depicted in the figure below, conversations around all sentiment categories were positive, apart from safety which brought on a more negative tone. Amenities + entertainment and relaxation + wellness was the categories that achieved the highest score at 33 respectively.



CATEGORIES	VOLUME COMPARISON	CAPE TOWN		
		Volume	Emotion	Sentiment
▲ Outdoor Activities		29% ▲ 2%	Joy	26 Average
▲ Food + Culinary		12% ▲ 1%	Joy	31 Average
▲ Destination Services		11% ▼ 7%	Joy	28 Average
▲ Relaxation + Wellness		11% ▼ 1%	Joy	33 Average
▲ Access + Transportation		11% ▼ 2%	Joy	11 Average
▲ Amenities + Entertainment		10% ▲ 0%	Joy	33 Average
▲ Safety		8% ▲ 4%	Sadness	-7 Average
▲ Culture + History		7% ▲ 1%	Joy	23 Average



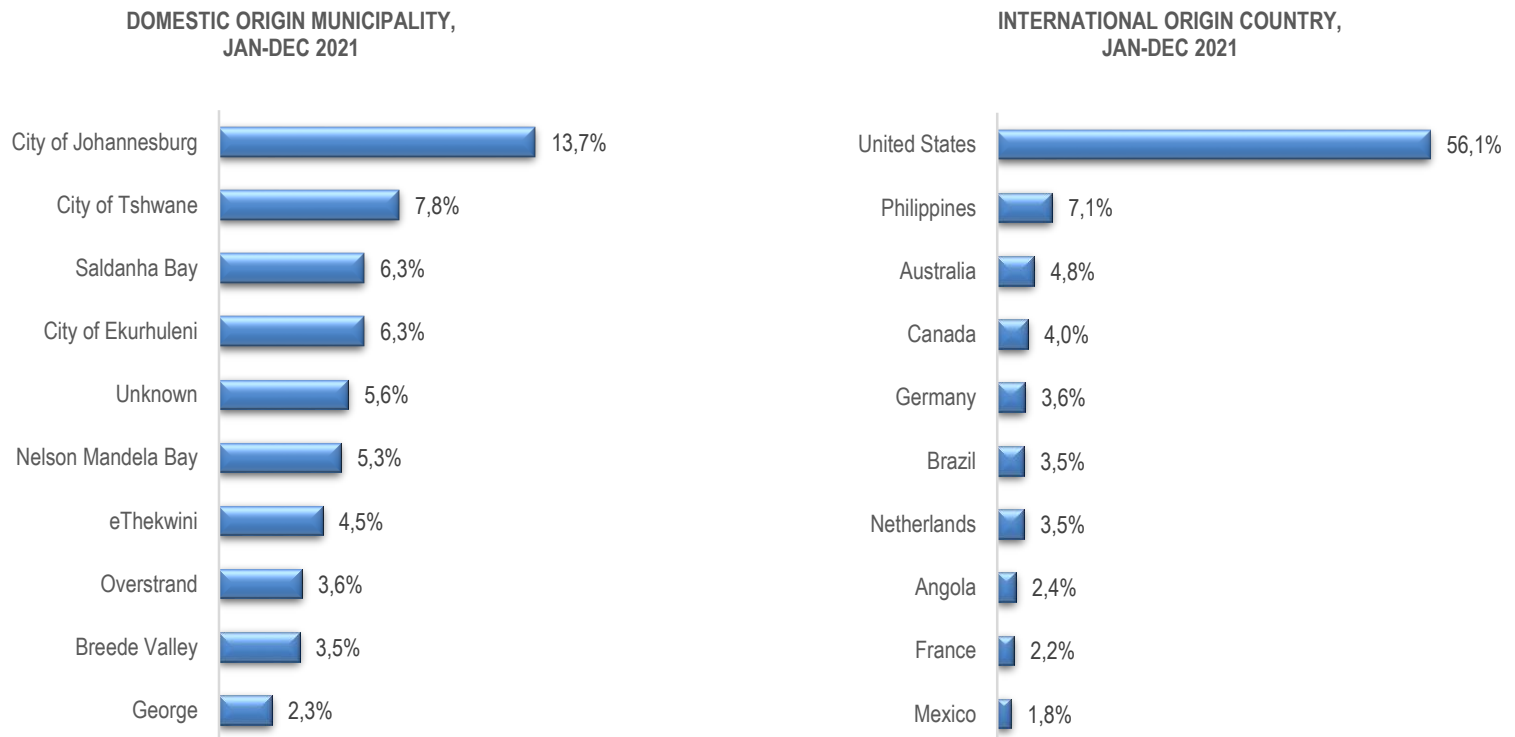
Cape Town Visitor Trends:
Mobile Location Data Insights: January-December 2021

7. Cape Town Mobile Location Data Insights

- **What is mobile location data?**
 - 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 anonymized 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 region.
 - Mobile location data serves as a sample. It is not 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.

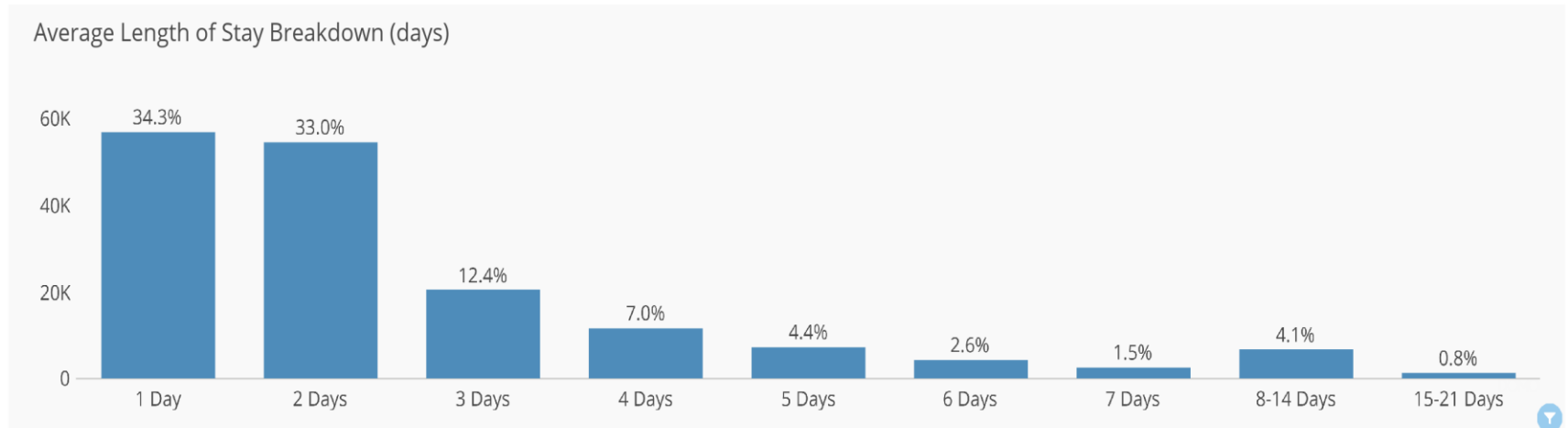
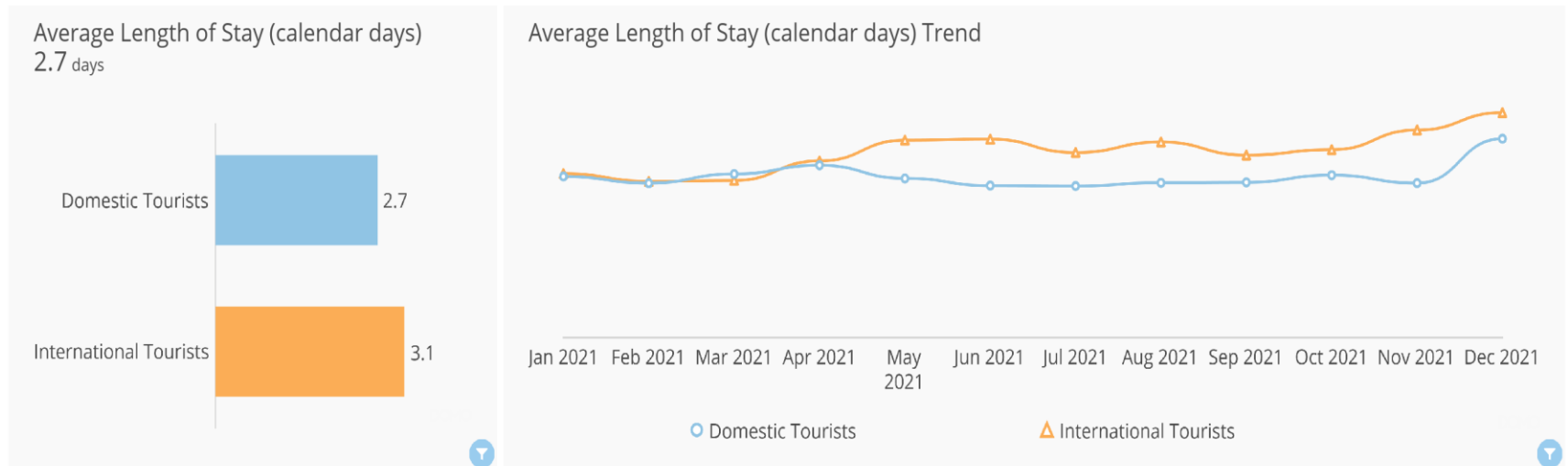
7. Cape Town Mobile Location Data Insights

- The insights in this report represents mobile location data from a sample of **161,125 domestic** and **4,356 international** tourists who visited Cape Town between January and December 2021.
- Within the domestic data set, 13,7% of the sampled tourists were from the City of Johannesburg and from the international sampled tourists, 56,1% were from the United States.



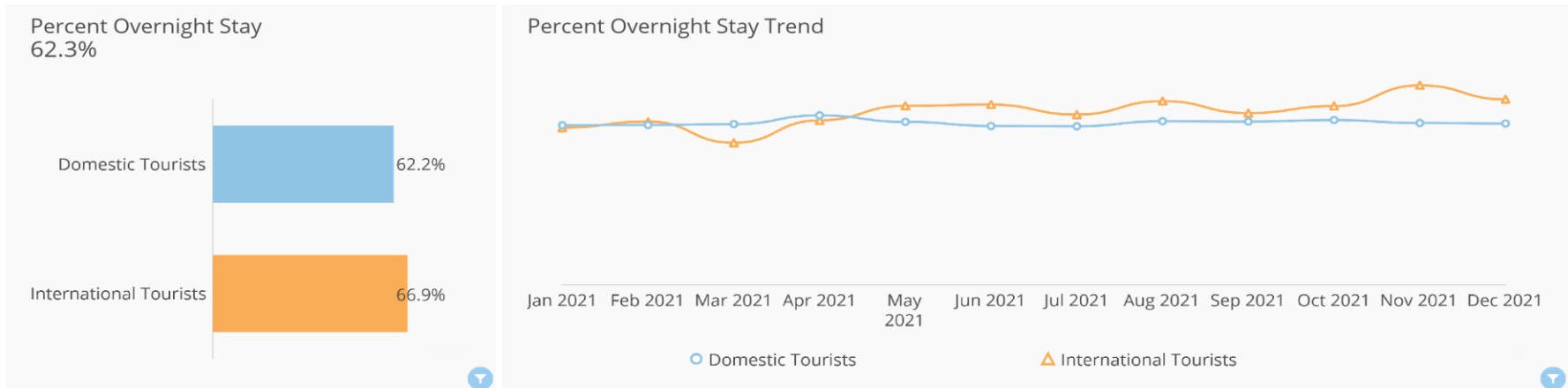
7. Average Length of Stay

- On average, domestic tourists stayed in Cape Town for 2,7 days while the international tourists stayed slightly longer at 3,1 days.



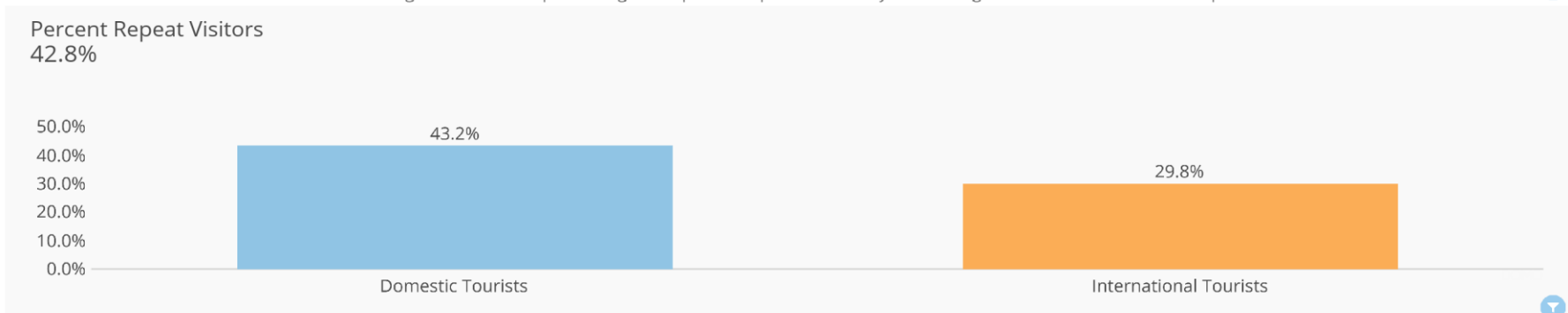
7. Repeat Visitors & Popular Months/Arrival/Departure

- 66,9% of the sampled international tourists and 62,2% of domestic tourists stayed overnight in Cape Town.
- Cape Town saw most of its repeat visits from the domestic tourists (43,2%) and 29,8% of international tourists visited Cape Town before.



Percent of Tourists that are Repeat Visitors

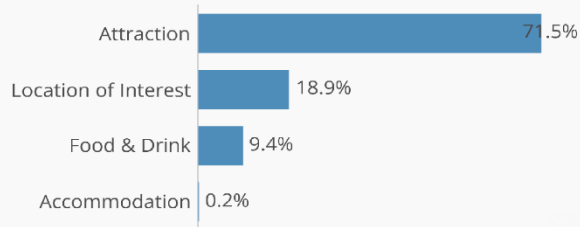
The following illustrates the percentage of repeat sampled visitors by tourist segment for the selected time period.



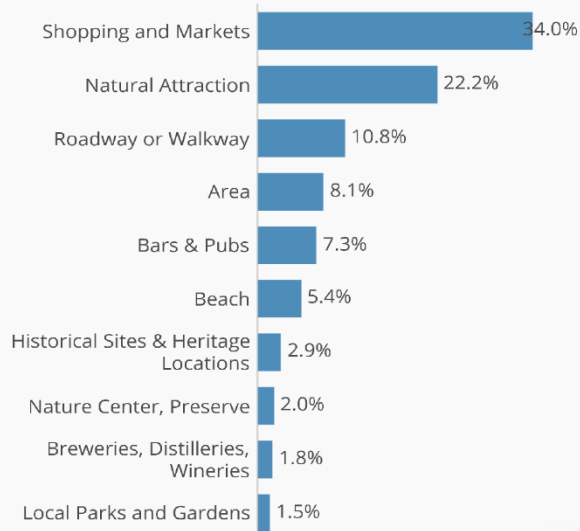
7. Points of Interests (POIs) Visited: Domestic Tourists

- Attractions (71,5%) ranked as the top point of interest among the domestic sampled tourists. Shopping & markets (34,0%), Natural attractions (22,2%) and roadway or walkway were among the most popular activities undertaken in Cape Town. 8 out of the top 15 points of interests were located in Cape Town, of which the top 3 included the V&A Waterfront Precinct, Table Mountain and the Cape Town restaurants and bars.

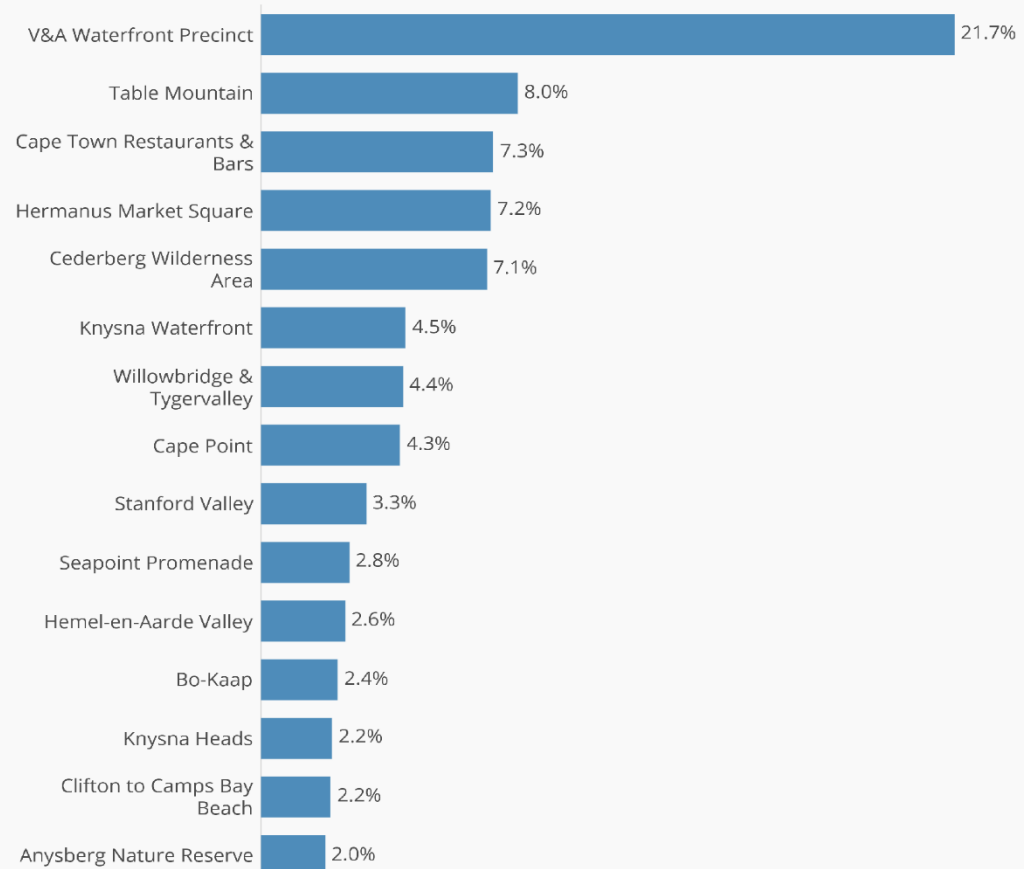
Points of Interest Visited by Sector



Points of Interest Visited by Sub-Sector



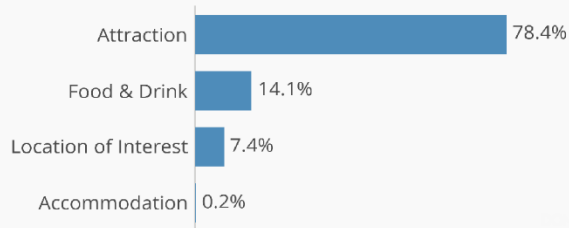
Top Points of Interest Visited



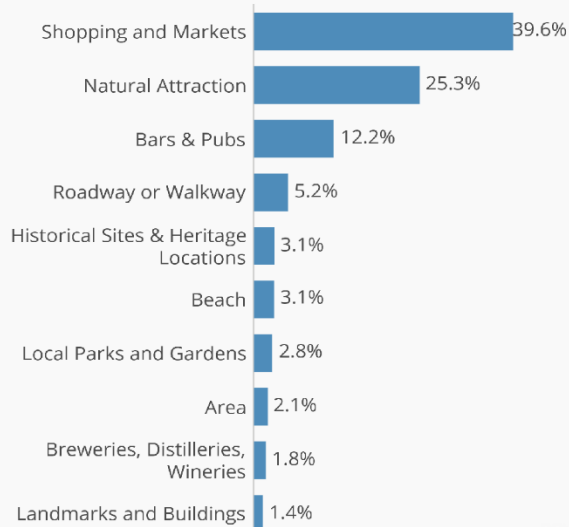
7. Points of Interests (POIs) Visited: International Tourists

- Close to 80% of the international sampled tourists enjoyed visiting attractions in Cape Town. Their top preferences included shopping and markets (39,6%), natural attractions (25,3%) and bars & pubs (12,2%). Out of the top 15 points of interests visited in 2021, the top 5 visited by the international tourists were located in Cape Town which included the V&A Waterfront, Table Mountain, Cape Town restaurants and bars, Cape Point and Willowbridge & Tygervalley.

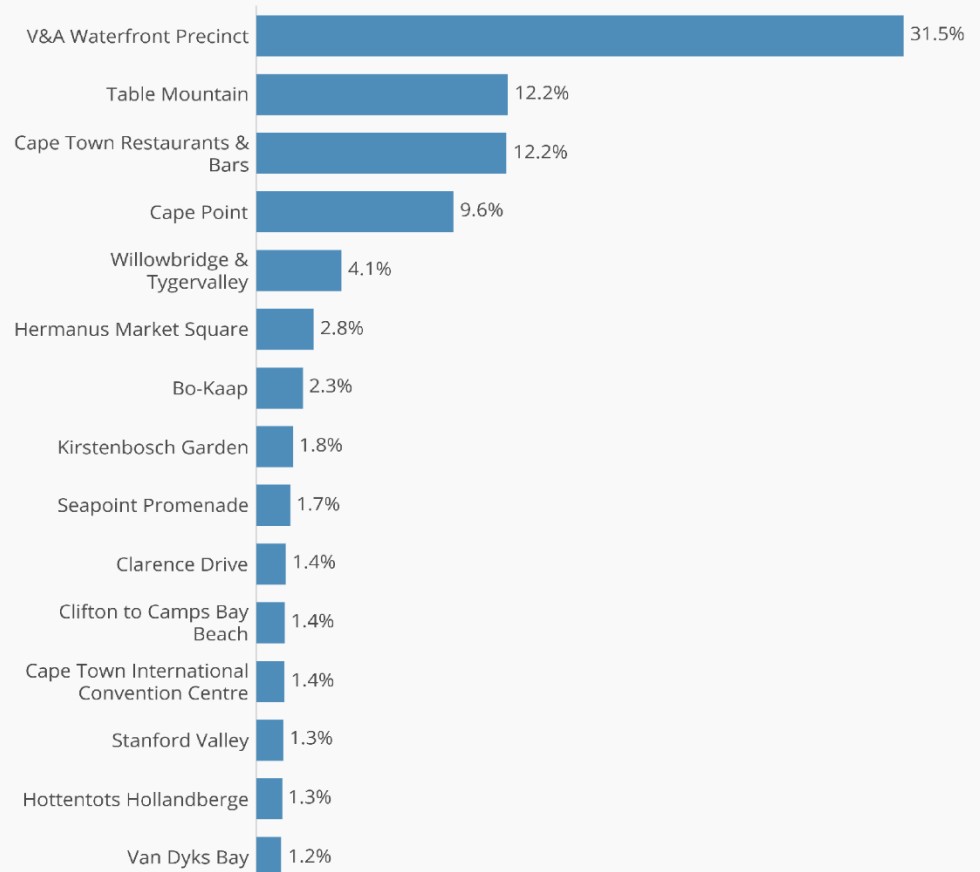
Points of Interest Visited by Sector



Points of Interest Visited by Sub-Sector



Top Points of Interest Visited



8. Mobile Tourists and Non-Tourists Definitions

- **About Mobile Location Data**

- Privacy compliant data is collected from location enabled apps on mobile devices. Data collected when those location enabled mobile devices entered our geo fenced area
- Data is collected through applications (news, weather, games, texting apps, traffic, etc)
 - Year over year numbers could be skewed by increase app penetration and data privacy settings/policies.
 - Exception with 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
- 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 vs Non-Tourists?**

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

8. Mobile Tourists and Non-Tourists Definitions

Primary Study Geography	Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Cape Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have traveled 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 traveled to meet the definition of tourist. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center 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 traveled 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 a tourist of the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon Minimum duration of visit of 45 minutes excludes commuters driving through each city 	
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.). Filter out people who work at the Tourism Experience. 	
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 Western Cape International Tourists: Tourists who reside outside of South Africa 	

9. 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 visitor ship 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 Friday, 8am 6pm local time] 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 of 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 of devices which are determined to have NOT 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 characterizes 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 that arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterizes 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.

10. Acknowledgements

Acknowledgements and many thanks go to the following for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating indicators and attractions in Cape Town:

- Kirstenbosch National Botanical Garden
- Table Mountain Aerial Cableway
- Robben Island
- South African National Parks Board
- Table Mountain National Park
- V&A Waterfront
- ACSA: Cape Town International Airport
- STR Global
- Tourism Sentiment Index (STI)
- ROVE Mobile Location Insights Data

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