Tourism Research Overview
April 2022
Cape Town & the Western Cape

Key Findings:

- April 2022 findings point to a solid recovery for the Western Cape's tourism sector over the Easter season. Not only is air passenger traffic on the rise, the April 2022 monthly performance reflected significant recovery rates of 100% and more.

- International and domestic terminal passengers both recovered to **over 70%** in April 2022 and George Airport passengers fully recovered **(101%)** when compared to April 2019.

- Hotel **occupancy** grew from 37,9% in April 2021 to **52,4% in April 2022**, representing a **recovery rate of 87%** when compared to April 2019.

- The **Average Daily Rate (ADR)** for the Western Cape **grew to R1, 528.83 in April 2022**, with a remarkable **recovery rate of 100%** on its 2019 figure. **RevPAR (Revenue Per Average Room)** reached **R801.72 in April 2022** and grew by 88% on its 2021 figure. Hotel revenue for the Western Cape **recovered to 88% in April 2022** when compared to April 2019.

- Visitors to the 27 participating attractions recorded a total of **448,347** in April 2022, a **67% year-on-year growth in the number of visitors** and a **recovery rate of 61%** when compared to April 2019 (734,850).

- The **top 5 highest year-on-year growth** rates were recorded for Agulhas National Park (+705%), Kogelberg Nature Reserve (+167%), Table Mountain National Park: Boulders (+159%), Robben Island (+145%) and Stony Point (+112%). **9 out of the 27** listed attractions **recovered to 100% and more** when compared to the April 2019 figures.

- According to the Tourism Sentiment Index (TSI), the biggest volume of online conversations about the Western Cape was around **outdoor activities**. Highest sentiment was driven by **Destination Services (38),** which includes conversations around accommodation, tours, conference/conventions and weddings. Weddings in particular drove the high sentiment in this category with a **score of 43**.

- Based on mobile location data insights **from 71 583 domestic and 1 584 international tourists**, the Cape Winelands was the most popular region among domestic visitors while international visitors mainly spent time in Cape Town. The Cape Winelands (76%) was the most popular region for repeat visits among domestic tourists and Cape Town saw the most international repeat visits. On average, domestic visitors spent the longest time in the Garden Route & Klein Karoo (3,9 days), while international visitors spent on average 4,1 days in Cape Town. Garden Route & Klein Karoo ranked as the most popular region for overnight stays amongst both domestic (over 70%) and international visitors (over 80%), and more than 70% of international visitors stayed overnight in both Cape Town and Weskus.

- Shopping and markets were the most popular type of attraction visited by both domestic and international tourists. Prominent shopping points included the V&A Waterfront, Willowbridge, Tygervalley and the Knysna Waterfront. Domestic visitors spent on average 2,6 hours shopping while international visitors shopped for 2,9 hours.

- Natural attractions; particularly Table Mountain, Cape Point, Hottentots Hollandberge, Knysna Heads and the Southern Tip of Africa were popular amongst both domestic and international tourists.

- From a sample size of 1,268 tourists who visited the Stellenbosch Wine Route, 76% were locals, 20% domestic and 3% were international tourists. Spier was the most visited farm on the route, followed by Skilpadvlei and Vredenheim.

1. CPT International Terminal Passenger Performance

Year/Month	2019	2020	2021	2021				2022		
				Oct	Nov	Dec	Jan	Feb	Mar	Apr
Two-way passengers	2 606 398	810 811	525 441	71 175	96 232	76 522	98 211	125 861	161 064	157 148
Passenger recovery*	100%	31%	20%	34%	38%	27%	35%	52%	61%	76%
Average load factor	82%	63%	46%	Arr 47%	Arr 67%	Arr 61%	Arr 65%	Arr 76%	Arr 71%	Arr 77%
				Dep 58%	Dep 59%	Dep 55%	Dep 67%	Dep 69%	Dep 82%	Dep 83%

* Passenger recovery compared to same period in 2019

* Two-way passengers: The sum of arrival and departure passengers

* Average load factor: The % of available seats that is occupied on a flight

Passenger data source: ACSA

Operating carriers

BRITISH AIRWAYS

AIR BOTSWANA

Lufthansa

Fly Namibia

QATAR AIRWAYS

Kenya Airways
The Pride of Africa

Ethiopian

RwandAir

UNITED

AIRLINK

SINGAPORE AIRLINES

edelweiss

KLM

TAAG

TURKISH AIRLINES

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Emirates

Source: OAG Schedules Analyser

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2. CPT DOMESTIC Terminal Passenger Performance

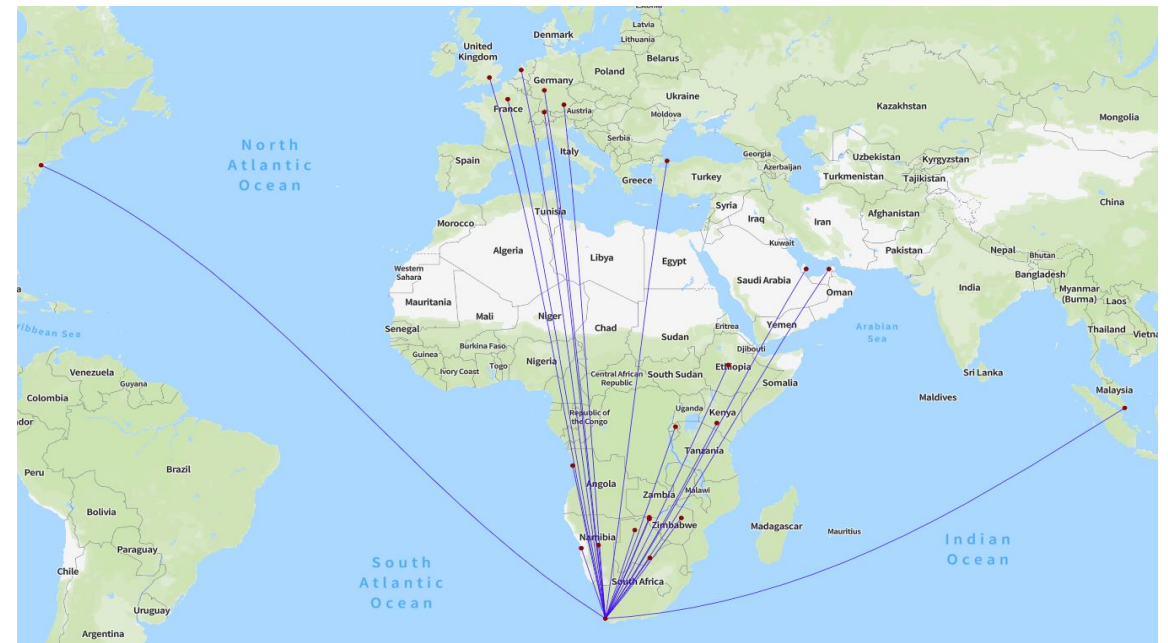| Year/Month	2019	2020	2021	2021				2022		
				Oct	Nov	Dec	Jan	Feb	Mar	Apr
Two-way passengers	8 363 307	3 167 542	4 221 365	467 159	457 599	520 508	479 942	462 219	556 644	539 049
Passenger recovery*	100%	38%	50%	65%	66%	66%	74%	71%	72%	75%
Average load factor	78%	64%	67%	Arr 81%	Arr 77%	Arr 78%	Arr 73%	Arr 79%	Arr 82%	Arr 81%
				Dep 80%	Dep 78%	Dep 72%	Dep 78%	Dep 76%	Dep 84%	Dep 82%

* Passenger recovery compared to same period in 2019

* Two-way passengers: The sum of arrival and departure passengers

* Average load factor: The % of available seats that is occupied on a flight
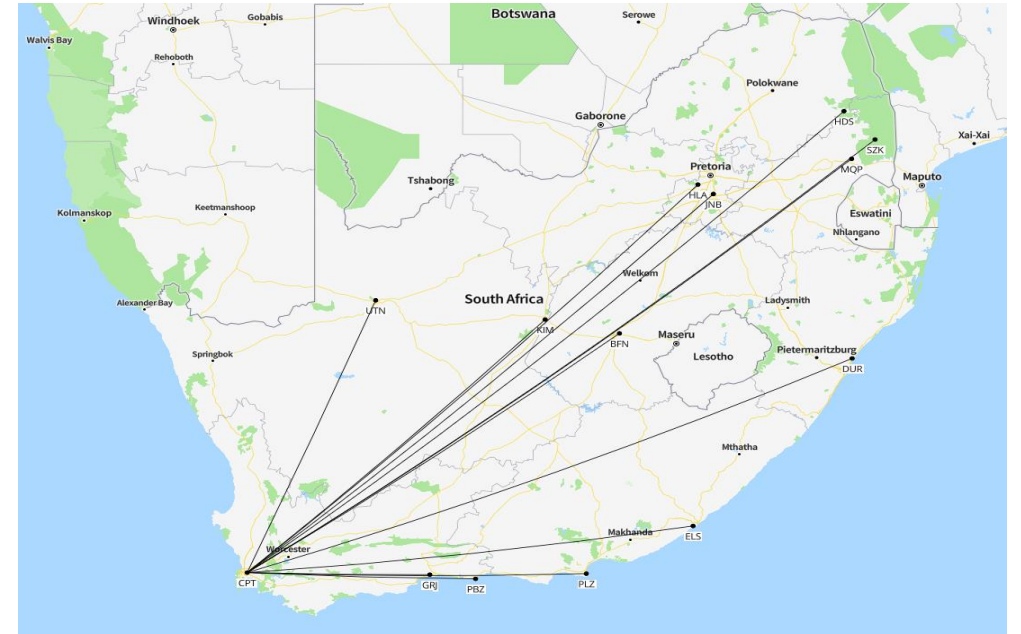
Passenger data source: ACSA

Operating carriers

Source: OAG Schedules Analyser

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3. George Airport (GRJ) Passenger Performance

Year/Month	2019	2020	2021	2021				2022		
				Oct	Nov	Dec	Jan	Feb	Mar	Apr
Two-way passengers	832 981	340 438	536 886	59 536	56 129	70 708	57 371	53 820	70 528	72 678
Passenger recovery*	100%	41%	64%	84%	79%	73%	86%	87%	97%	101%

* Passenger recovery compared to same period in 2019

* Two-way passengers: The sum of arrival and departure passengers

Passenger data source: ACSA

Operating carriers
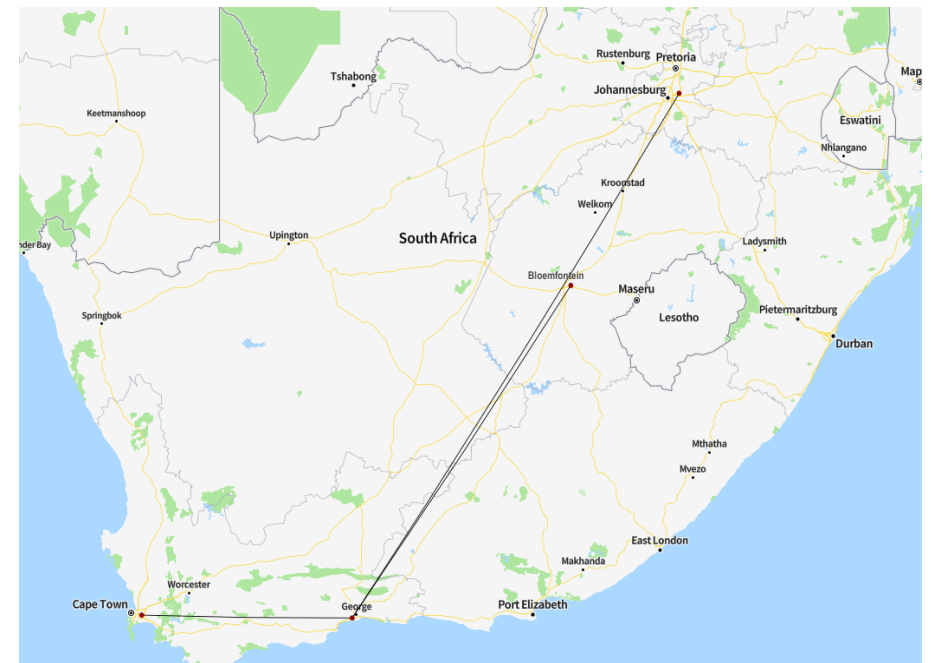
Source: OAG Schedules Analyser

4. Hotel Occupancy in the Western Cape

- **Occupancy** in the Western Cape reached **52,4%** in April 2022, and **grew by 38%** when compared to April 2021, reaching a **recovery rate of 87%** when compared to the 60% occupancy rate in April 2019.

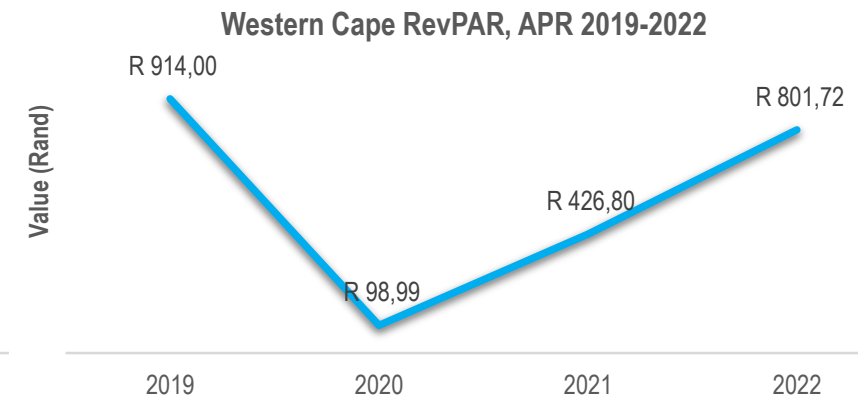- **The Average Daily Rate (ADR)** for the Western Cape grew to **R1, 528.83** in April 2022, with a remarkable **recovery rate of 100%** on its 2019 figure.

- At **R801.72** in April 2022, **RevPAR (Revenue Per Average Room) grew by 88%** on its 2021 figure and **recovered to 88%** when compared to April 2019.

Western Cape Occupancy, APR 2019-2022

% Occupancy

- 60,0% (2019)
- 12,1% (2020)
- 37,9% (2021)
- 52,4% (2022)

Western Cape ADR, APR 2019-2022

Value (Rand)

- R1 522,18 (2019)
- R 820,35 (2020)
- R1 126,06 (2021)
- R1 528,83 (2022)

Western Cape RevPAR, APR 2019-2022

Value (Rand)

- R 914,00 (2019)
- R 98,99 (2020)
- R 426,80 (2021)
- R 801,72 (2022)

Source: STR Global, 2022

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5. Western Cape Attractions

- Visitors to the 27 participating attractions across the province recorded a total of **448,347** in April 2022, a **67% growth in the number of visitors** when compared to April 2021, and a **recovery rate of 61%** when compared to April 2019.

- **The top 5 highest year-on-year growth** rates were recorded for Agulhas National Park (+705%), Kogelberg Nature Reserve (+167%), Table Mountain National Park: Boulders (+159%), Robben Island (+145%) and Stony Point (+112%).

- **9 out of the 27** listed attractions **recovered to 100% and more** when compared to the April 2019 figures.
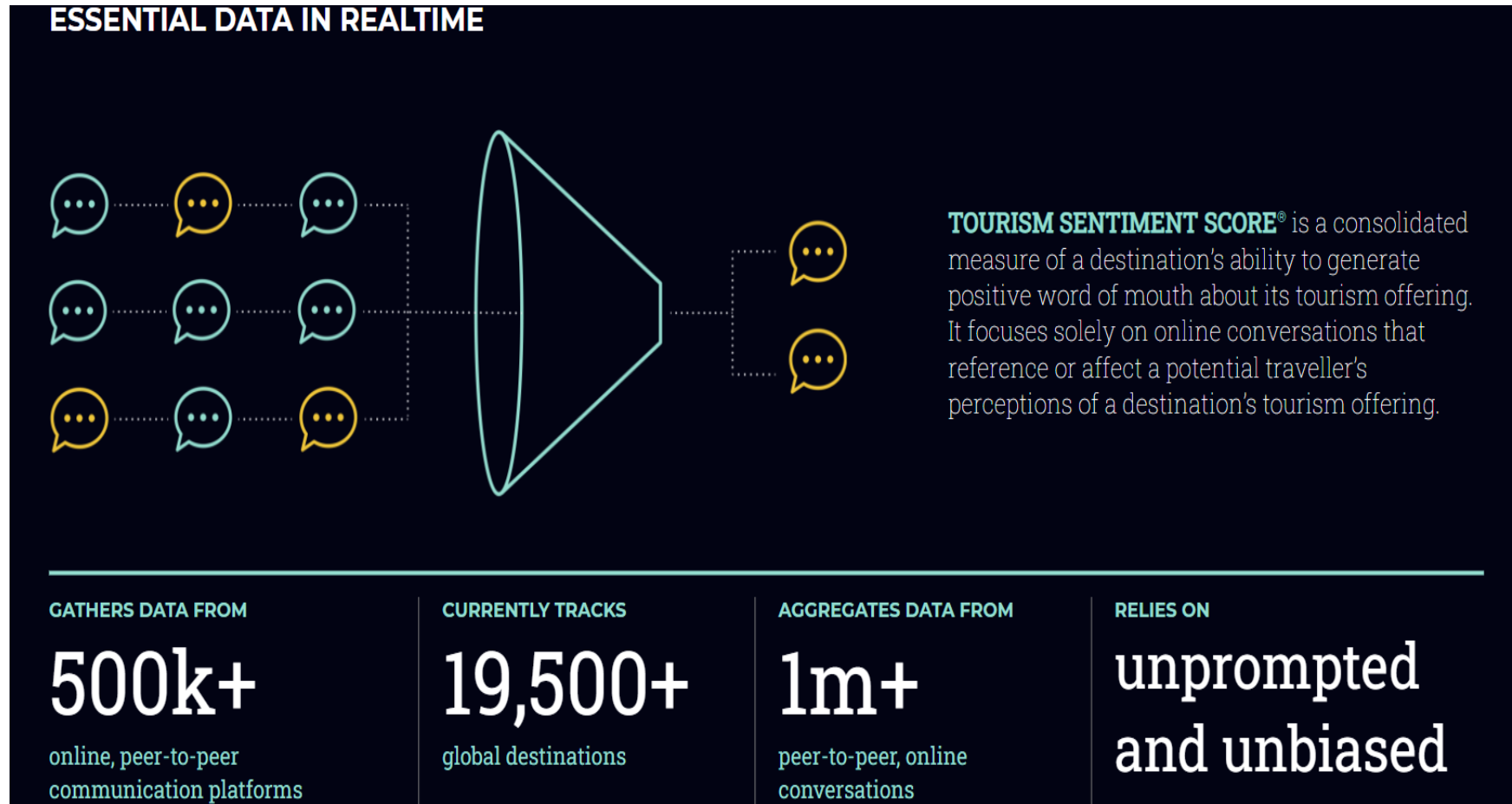
Visitors to participating Western Cape Attractions, April 2019 - 2022

	2019	2020	2021	2022
Total Visitors	734 850	0	269 267	448 347
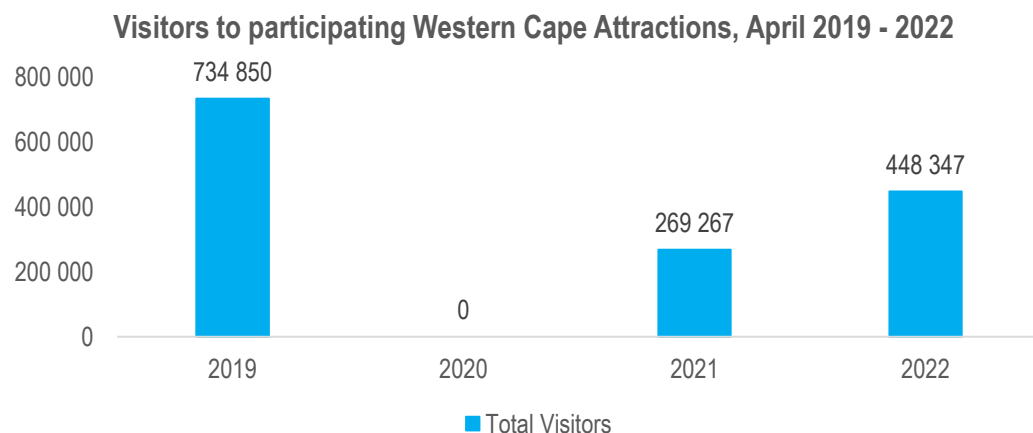
Attractions	Apr 2021/2022 % Change	Apr 2019/2022 Recovery %
Cape Town		
Table Mountain National Park	+88%	60%
Table Mountain National Park: Boulders	+159%	58%
Table Mountain National Park: Cape of Good Hope	+91%	54%
Table Mountain Aerial Cableway	+109%	59%
Kirstenbosch National Botanical Garden	+20%	69%
Robben Island	+145%	50%
Cape Overberg		
Cape Agulhas Lighthouse	*Did not open in Apr 2021*	95%
Agulhas National Park	+705%	93%
Bontebok National Park	-7%	98%
De Hoop Nature Reserve	+43%	152%
De Mond Nature Reserve	-37%	105%
Harold Porter National Botanical Garden	+14%	85%
Kogelberg Nature Reserve	+167%	100%
Stony Point	+112%	36%
Shipwreck Museum	-9%	52%
Garden Route & Klein Karoo		
Cango Caves	+78%	54%
Wilderness National Park	-5%	98%
Tsitsikamma National Park	+18%	64%
Knysna National Park	-18%	119%
Weskus		
West Coast National Park	-27%	63%
!Khwattu	+26%	108%
Old Jail	-58%	38%
Cape Karoo		
Karoo National Park	-17%	100%
Cape Winelands		
Avalon Springs (day visitors)	*Closed for renovations (Apr 2022)*	
Protea Tractor Trip	+30%	109%
Birds Paradise	-16%	144%
Viljoensdrift River Cruises	+5%	151%

Source: SANParks, LTO's, and Attractions, 2022

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Tourism Sentiment Analysis for the Western Cape

6. Tourism Sentiment for the Western Cape

ESSENTIAL DATA IN REALTIME

TOURISM SENTIMENT SCORE® is a consolidated measure of a destination's ability to generate positive word of mouth about its tourism offering. It focuses solely on online conversations that reference or affect a potential traveller's perceptions of a destination's tourism offering.

GATHERS DATA FROM	CURRENTLY TRACKS	AGGREGATES DATA FROM	RELIES ON
500k+	19,500+	1m+	unprompted and unbiased
online, peer-to-peer communication platforms	global destinations	peer-to-peer, online conversations	

Source: TSI, 2022

6. Tourism Sentiment for the Western Cape

WESTERN CAPE, SOUTH AFRICA

TOURISM SENTIMENT SCORE®

28

TOURISM SENTIMENT SCORE®:

28

WESTERN CAPE'S SCORE IS COMPOSED OF

▲ Percentage of Promoters — 30%

▼ Percentage of Detractors — 2%

TOURISM SENTIMENT SCORE® OVER TIME

1 Tourism Sentiment Score: 34
Beaches
10% OF TOTAL TOURISM CONVERSATION

2 Tourism Sentiment Score: 17
Wildlife Viewing
9% OF TOTAL TOURISM CONVERSATION

3 Tourism Sentiment Score: 34
Restaurant / Dining / Takeaway
8% OF TOTAL TOURISM CONVERSATION

1 Tourism Sentiment Score: 34
Beaches
13% OF TOTAL POSITIVE CONVERSATION

2 Tourism Sentiment Score: 34
Restaurant / Dining / Takeaway
9% OF TOTAL POSITIVE CONVERSATION

3 Tourism Sentiment Score: 28
Winery + Vineyards
9% OF TOTAL POSITIVE CONVERSATION

Source: TSI, 2022

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6. Tourism Sentiment for the Western Cape

- Tourism Sentiment is based on **11 068 conversations** analyzed between 1 and 30 April 2022.

- The **biggest volume** of conversations was around **outdoor activities**.

- **Highest sentiment** was driven by **Destination Services** (38), which includes conversations about accommodation, tours, conference and conventions, and weddings. **Weddings** in particular drove the high sentiment in this category with a score of 43.

- **Relaxation and Wellness** (33) scored the 2nd highest sentiment score.

- **Spa and Wellness** (45), though smaller in volume, had a significantly high sentiment.

- **Access and Transportation** drove the **lowest sentiment** in April 2022.

CATEGORIES	VOLUME COMPARISON	WESTERN CAPE		
		Volume	Emotion	Sentiment
▲ Outdoor Activities	▬▬▬▬	36% ▼1%	Joy	24 Average
▲ Food + Culinary	▬▬	18% ▲1%	Joy	31 Average
▲ Relaxation + Wellness	▬▬	13% ▲2%	Joy	33 Average
▲ Amenities + Entertainment	▬▬	11% ▲2%	Joy	31 Average
▲ Destination Services	▬	8% ▼1%	Joy	38 High
▲ Access + Transportation	▬	6% ▼1%	Joy	18 Average
▲ Culture + History	▬	6% ▲0%	Joy	21 Average
▲ Safety	▪	2% ▼2%	Sadness	21 Average

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Visitor Trends
Mobile Location Data Insights

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7. Western Cape Mobile Location Data Insights

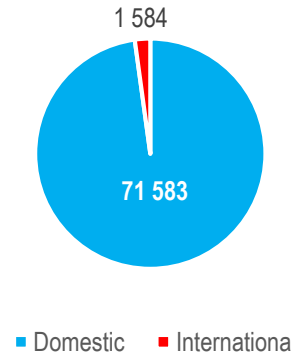- ## What is mobile location data?
  - Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
  - Users can opt in to location sharing (or 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.
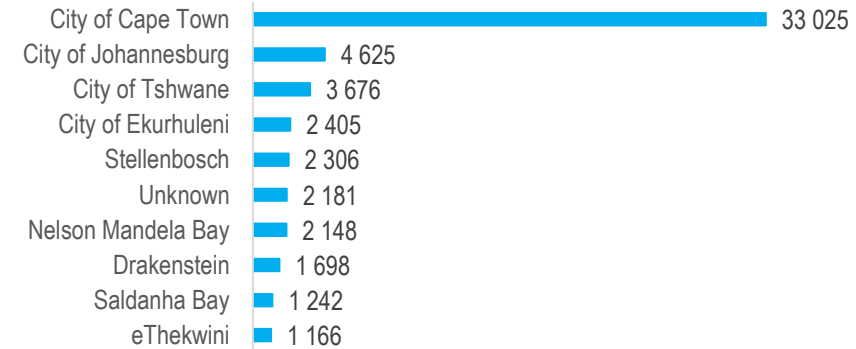
The insights in this report represents mobile location data from a total sample of **73 167,** with **71 583 domestic** and **1 584 international** tourists who visited the Western Cape in April 2022. Within the domestic data set, close to half of the sampled tourists were from the City of Cape Town and from the international sampled tourists, 725 were from the United States.
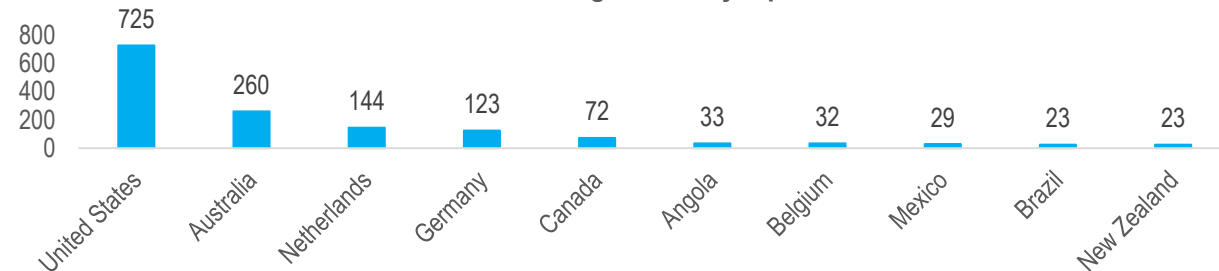
Total Sample Size: April 2022

1 584

71 583

- Domestic
- International

Source: Rove, 2022

Domestic Origin Municipality, April 2022

City of Cape Town	33 025
City of Johannesburg	4 625
City of Tshwane	3 676
City of Ekurhuleni	2 405
Stellenbosch	2 306
Unknown	2 181
Nelson Mandela Bay	2 148
Drakenstein	1 698
Saldanha Bay	1 242
eThekwini	1 166

Source: Rove, 2022

International Origin Country, April 2022

United States	725
Australia	260
Netherlands	144
Germany	123
Canada	72
Angola	33
Belgium	32
Mexico	29
Brazil	23
New Zealand	23

Source: Rove, 2022

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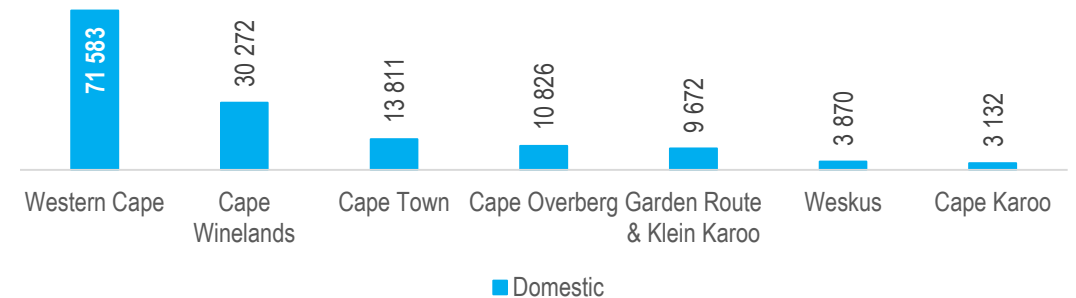
7.1. Mobile Insights: Domestic Visitor Trends

- In April 2022, the Cape Winelands (42%) and Cape Town (19%) saw the most domestic visitors with respect to volume and Cape Karoo (4%) recorded the least.

- The Cape Winelands (76%) was the most popular region for repeat visits, followed by the Cape Overberg (67%). The Cape Winelands had a slightly higher repeater rate than the general average for the province (71%).

Domestic Sample Size: April 2022

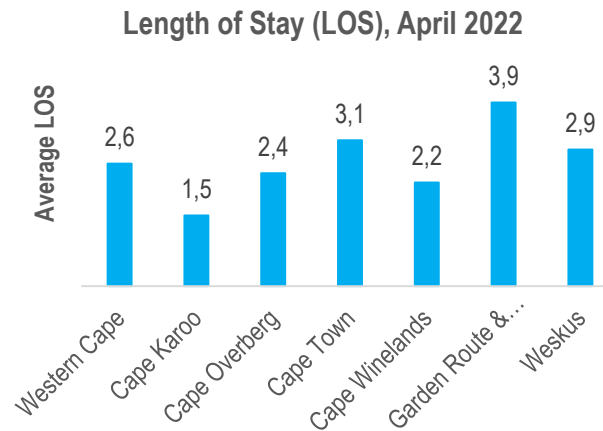| Region	Domestic
Western Cape	71 583
Cape Winelands	30 272
Cape Town	13 811
Cape Overberg	10 826
Garden Route & Klein Karoo	9 672
Weskus	3 870
Cape Karoo	3 132

■ Domestic

Source: Rove, 2022

Domestic Repeat Visitors in April 2022

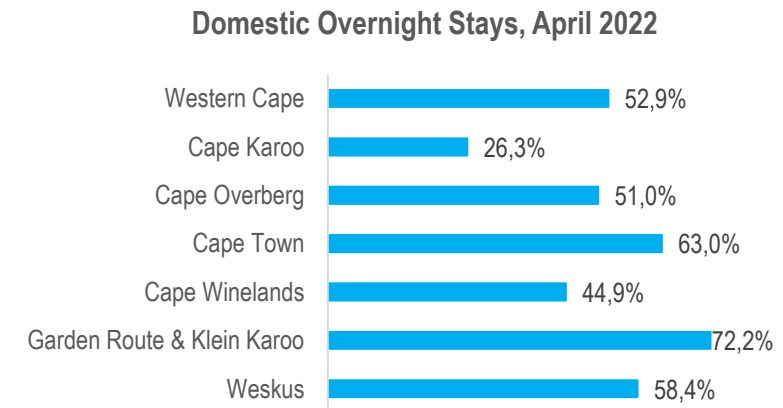| Region	%
Western Cape	70,8%
Cape Karoo	55,1%
Cape Overberg	67,1%
Cape Town	61,1%
Cape Winelands	76,0%
Garden Route & Klein Karoo	55,7%
Weskus	57,4%

Source: Rove, 2022
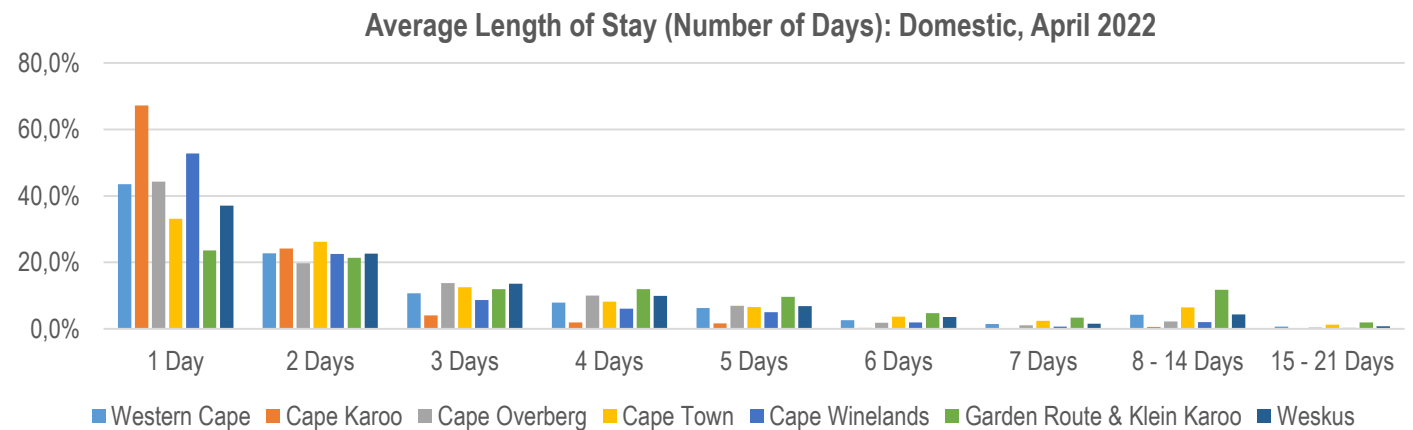
7.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic visitors spent the longest time in the Garden Route & Klein Karoo (3,9 days) and the shortest time in the Cape Karoo (1,5 days).

- Over 70% of sampled domestic tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (52,9%). In contrast, visitors to the Cape Karoo were more likely to stay for the day.

- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

Length of Stay (LOS), April 2022

Source: Rove, 2022

Domestic Overnight Stays, April 2022

Western Cape	52,9%
Cape Karoo	26,3%
Cape Overberg	51,0%
Cape Town	63,0%
Cape Winelands	44,9%
Garden Route & Klein Karoo	72,2%
Weskus	58,4%

Source: Rove, 2022

Average Length of Stay (Number of Days): Domestic, April 2022

Legend: Western Cape, Cape Karoo, Cape Overberg, Cape Town, Cape Winelands, Garden Route & Klein Karoo, Weskus
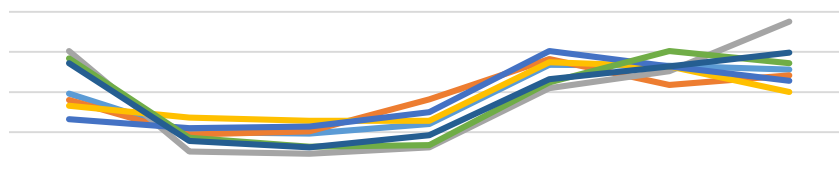
Source: Rove, 2022

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7.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the province were most likely to arrive on a Friday and depart on a Sunday.

- In the Cape Winelands, Monday (16,4%) and Friday (17,7%) were the most popular arrival days and Friday was also the most common day for departure in April 2022.

- Domestic visitors to the Garden Route & Klein Karoo arrived mostly on a Friday (25,6%) and departed on a Saturday (20,1%) or Monday (19,2%).

Popular Arrival Days of the Week: Domestic, April 2022

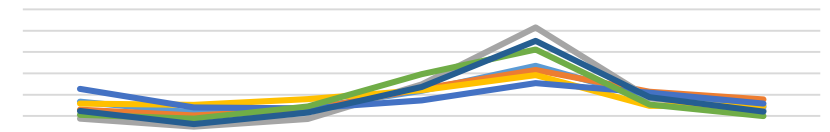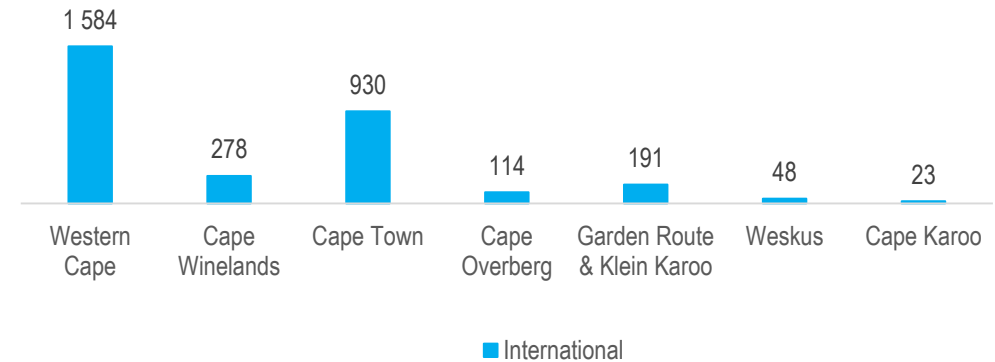|	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	13,4%	10,8%	11,8%	15,9%	21,8%	14,3%	12,1%
Cape Karoo	11,5%	10,1%	11,5%	16,4%	20,8%	15,7%	13,9%
Cape Overberg	9,4%	7,5%	9,3%	17,4%	30,8%	14,2%	11,3%
Cape Town	12,9%	12,6%	14,0%	16,1%	19,6%	12,4%	12,4%
Cape Winelands	16,4%	12,0%	11,8%	13,7%	17,7%	15,5%	12,9%
Garden Route & Klein Karoo	10,3%	9,4%	12,2%	19,8%	25,6%	12,7%	10,0%
Weskus	11,2%	8,1%	10,8%	16,8%	27,6%	14,4%	11,0%

Source: Rove, 2022

- In the Cape Karoo, which saw majority day visitors, Friday was the most popular arrival and departure day.

- Cape Town arrival days were most common on Thursday (16,1%) and Friday (19,6%) and departure was most popular on a Friday (18,7%) and Saturday (18,2%).

- Friday (30,8%) was the most popular arrival day in the Cape Overberg and Sunday (23,8%) the most common departure day.

- In the Weskus, Friday (27,6%) and Sunday (19,9%) were also the most popular arrival and departure days, respectively.

Popular Departure Days of the Week: Domestic, April 2022

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	14,8%	10,0%	9,8%	11,0%	18,4%	18,3%	17,8%
Cape Karoo	14,0%	9,7%	10,1%	14,1%	19,1%	15,9%	17,1%
Cape Overberg	20,1%	7,6%	7,3%	8,1%	15,5%	17,6%	23,8%
Cape Town	13,3%	11,8%	11,4%	11,4%	18,7%	18,2%	15,0%
Cape Winelands	11,6%	10,5%	10,7%	12,5%	20,1%	18,2%	16,4%
Garden Route & Klein Karoo	19,2%	9,3%	8,2%	8,4%	16,2%	20,1%	18,6%
Weskus	18,6%	8,9%	8,1%	9,6%	16,6%	18,2%	19,9%

Source: Rove, 2022

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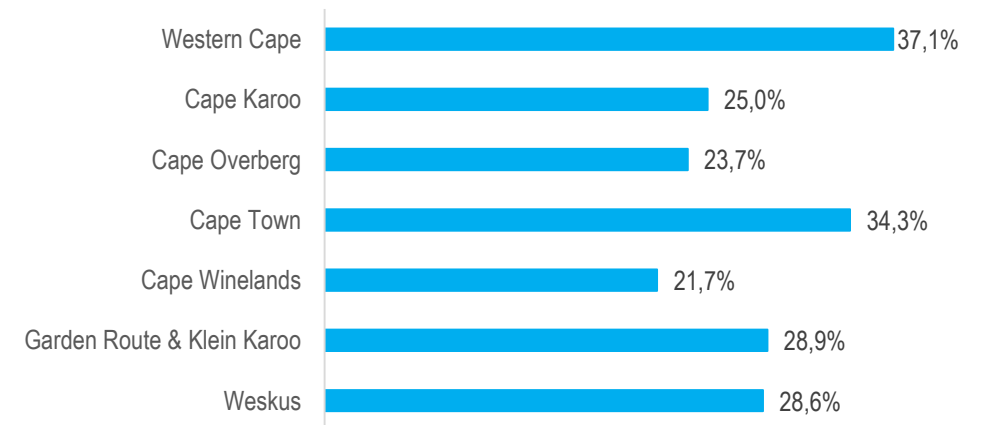
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7.2. Mobile Insights: International Visitor Trends

- More than half of the sampled international tourists visited Cape Town (930) followed by Cape Winelands (278) and Garden Route & Klein Karoo (191).

- Visitor trends for the Cape Karoo region is based on a sample size of only 23 international tourists.

- Cape Town, Garden Route & Klein Karoo and Weskus saw the most international repeat visitors in April 2022.

International Sample Size, April 2022

Region	International
Western Cape	1 584
Cape Winelands	278
Cape Town	930
Cape Overberg	114
Garden Route & Klein Karoo	191
Weskus	48
Cape Karoo	23

■ International

International Repeat Visits, April 2022

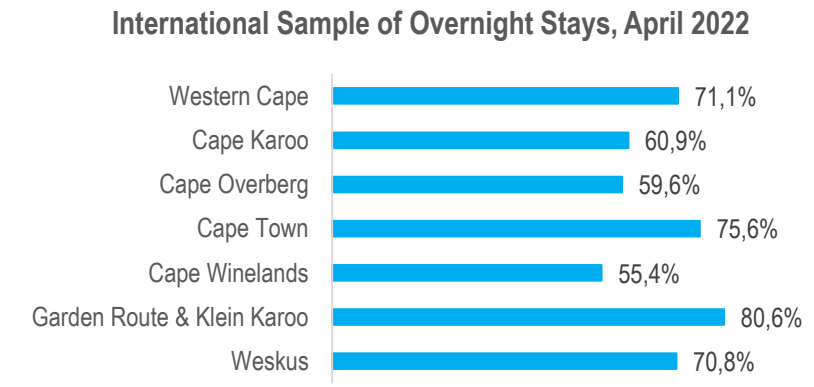| Region	%
Western Cape	37,1%
Cape Karoo	25,0%
Cape Overberg	23,7%
Cape Town	34,3%
Cape Winelands	21,7%
Garden Route & Klein Karoo	28,9%
Weskus	28,6%

Source: Rove, 2022

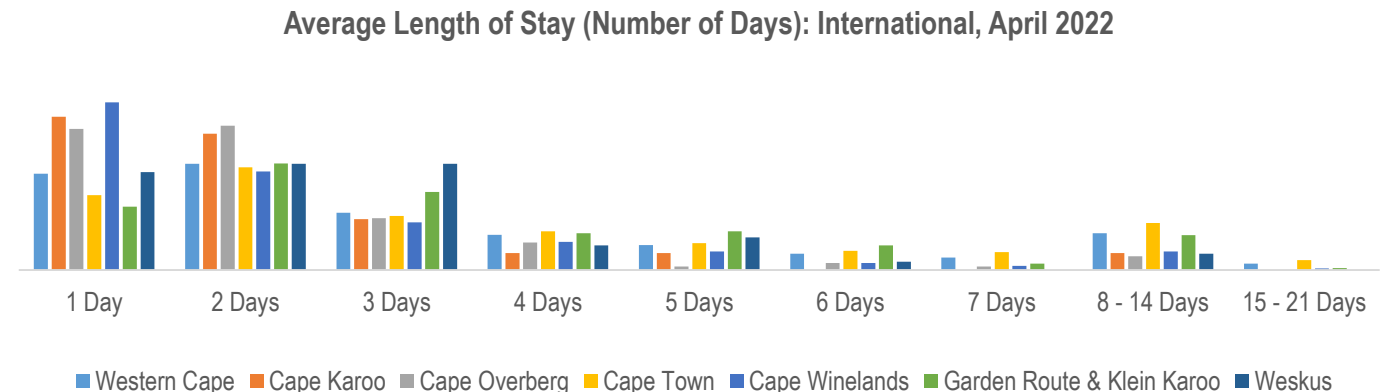# 7.2. Mobile Insights: International Visitor Trends

- On average, international visitors spent the longest time in Cape Town (4,1 days) followed by Garden Route & Klein Karoo (3,7 days).

- Over 80% of sampled international tourists stayed overnight in the Garden Route & Klein Karoo and more than 70% stayed overnight in both Cape Town and Weskus.

- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

Average Length of Stay (LOS), April 2022

Average LOS

- Western Cape: 3,6
- Cape Karoo: 2,2
- Cape Overberg: 2,3
- Cape Town: 4,1
- Cape Winelands: 2,5
- Garden Route & …: 3,7
- Weskus: 2,8

Source: Rove, 2022

International Sample of Overnight Stays, April 2022

- Western Cape: 71,1%
- Cape Karoo: 60,9%
- Cape Overberg: 59,6%
- Cape Town: 75,6%
- Cape Winelands: 55,4%
- Garden Route & Klein Karoo: 80,6%
- Weskus: 70,8%

Source: Rove, 2022

Average Length of Stay (Number of Days): International, April 2022

| 1 Day | 2 Days | 3 Days | 4 Days | 5 Days | 6 Days | 7 Days | 8 - 14 Days | 15 - 21 Days |

■ Western Cape ■ Cape Karoo ■ Cape Overberg ■ Cape Town ■ Cape Winelands ■ Garden Route & Klein Karoo ■ Weskus

Source: Rove, 2022

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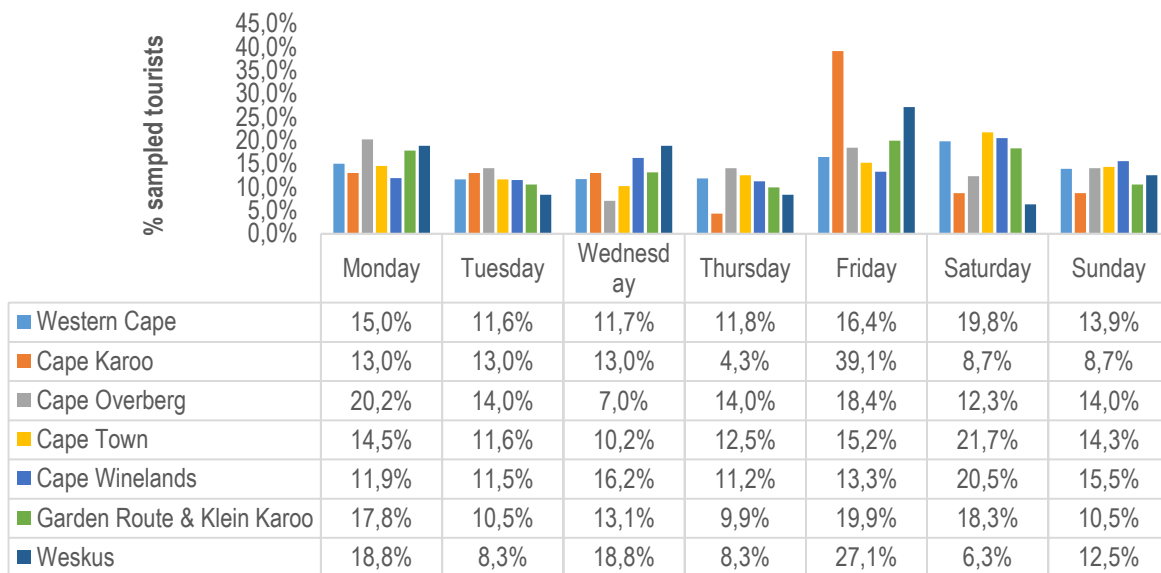
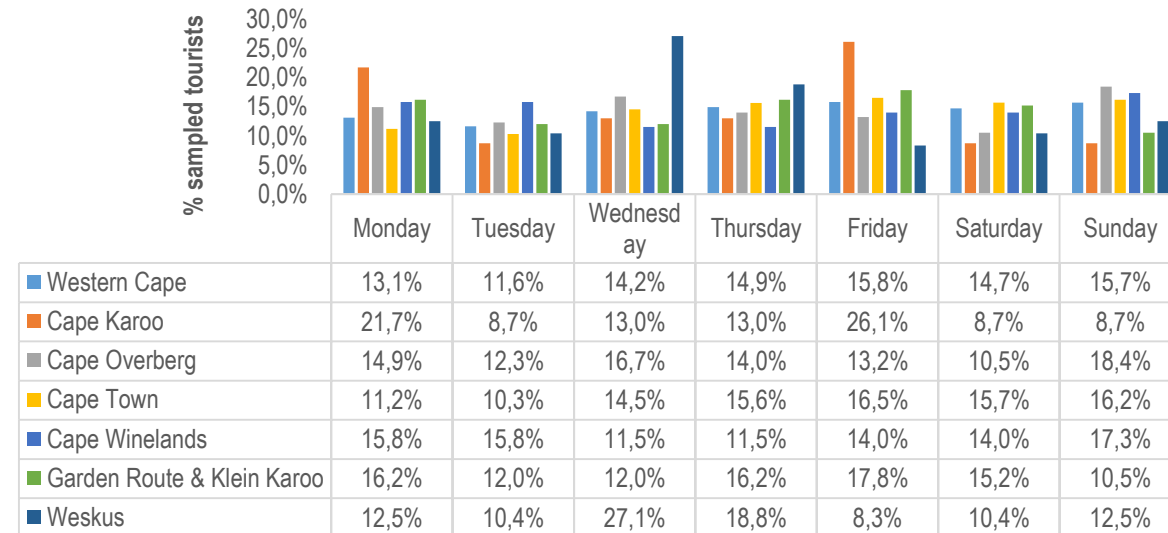# 7.2. Mobile Insights: International Visitor Trends

- International visitors to the province were most likely to arrive on a Friday or Sunday and depart on a Friday or Saturday.

- In the Cape Winelands, Sunday was the most popular arrival day and Saturday the most common departure day.

- International visitors to the Garden Route & Klein Karoo typically arrived and departed on a Friday respectively.

Popular Departure Days of the Week: International, April 2022

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	15,0%	11,6%	11,7%	11,8%	16,4%	19,8%	13,9%
Cape Karoo	13,0%	13,0%	13,0%	4,3%	39,1%	8,7%	8,7%
Cape Overberg	20,2%	14,0%	7,0%	14,0%	18,4%	12,3%	14,0%
Cape Town	14,5%	11,6%	10,2%	12,5%	15,2%	21,7%	14,3%
Cape Winelands	11,9%	11,5%	16,2%	11,2%	13,3%	20,5%	15,5%
Garden Route & Klein Karoo	17,8%	10,5%	13,1%	9,9%	19,9%	18,3%	10,5%
Weskus	18,8%	8,3%	18,8%	8,3%	27,1%	6,3%	12,5%

Source: Rove, 2022

Popular Arrival Days of the Week: International, April 2022

|	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	13,1%	11,6%	14,2%	14,9%	15,8%	14,7%	15,7%
Cape Karoo	21,7%	8,7%	13,0%	13,0%	26,1%	8,7%	8,7%
Cape Overberg	14,9%	12,3%	16,7%	14,0%	13,2%	10,5%	18,4%
Cape Town	11,2%	10,3%	14,5%	15,6%	16,5%	15,7%	16,2%
Cape Winelands	15,8%	15,8%	11,5%	11,5%	14,0%	14,0%	17,3%
Garden Route & Klein Karoo	16,2%	12,0%	12,0%	16,2%	17,8%	15,2%	10,5%
Weskus	12,5%	10,4%	27,1%	18,8%	8,3%	10,4%	12,5%

Source: Rove, 2022

- In the Cape Karoo, Friday was popular for both arrival and departure.

- Cape Town arrival days were most common on a Friday or Sunday and departure was most popular on a Saturday.

- Sunday was the most popular arrival day in the Cape Overberg and Monday was the most common departure day.

- In the Weskus, Wednesday the most popular arrival day and Friday a common departure day.
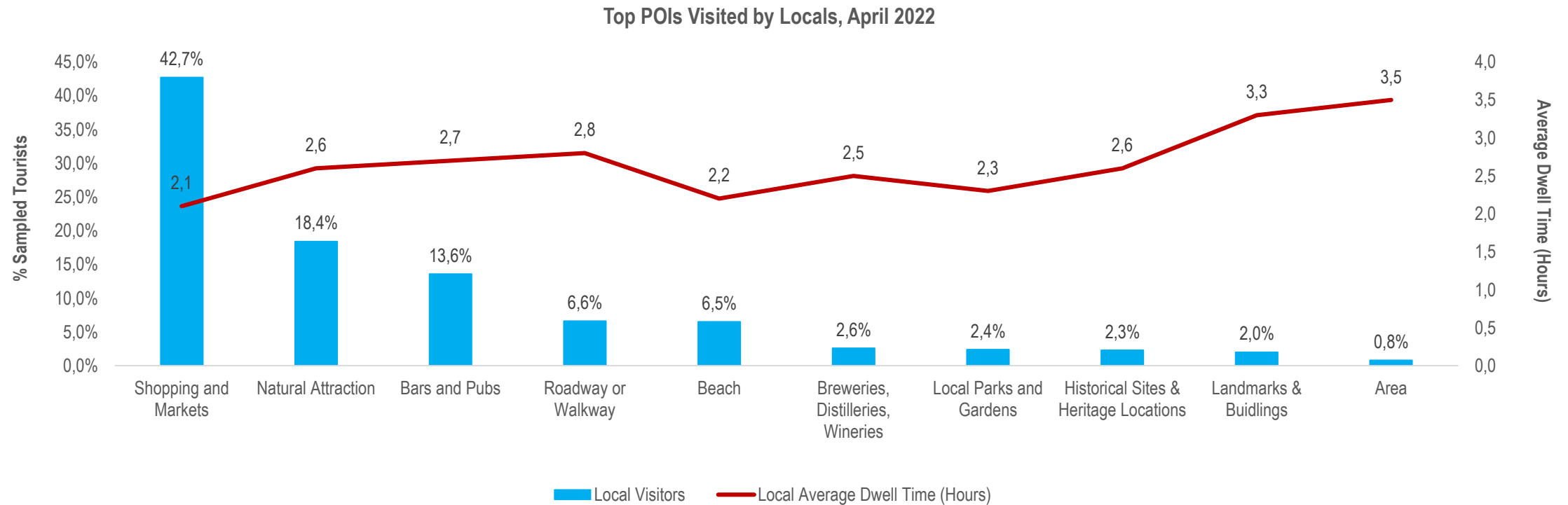
7.3. Points of Interest (POIs) Visited

- Shopping and markets was the most popular type of attraction visited by both domestic and international tourists. Prominent shopping points included the V&A Waterfront, Willowbridge, Tygervalley and the Knysna Waterfront.

- Domestic visitors spent on average 2,6 hours shopping while international visitors shop for 2,9 hours.

- Natural attractions, particularly Table Mountain, Cape Point, Hottentots Hollandberge, Knysna Heads and the Southern Tip of Africa were popular with both domestic and international tourists.

- Bars & Pubs in the city centre were the third most popular point of interest for international tourists who spent on average 3,1 hours at the location.

- Roadways & walkways, which include Stanford Valley, Sea Point Promenade, Hemel-en-Aarde Valley, Clarence Drive and Ashton Bridge, ranked third among the top POIs visited by domestic tourists, with an average dwell time of 2,9 hours.

Source: Rove, 2022

Source: Rove, 2022
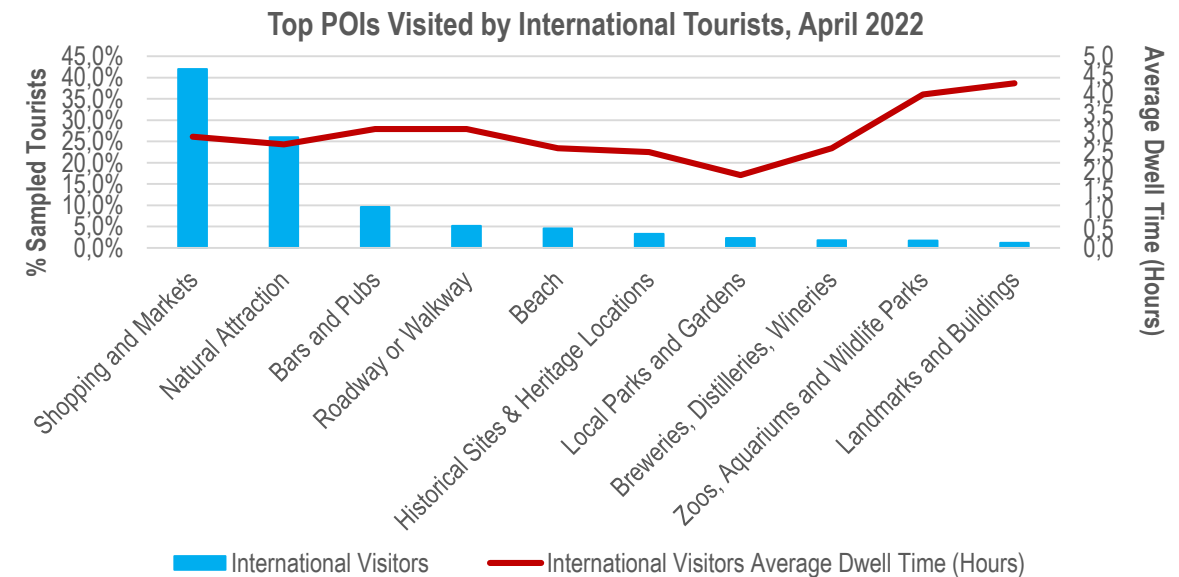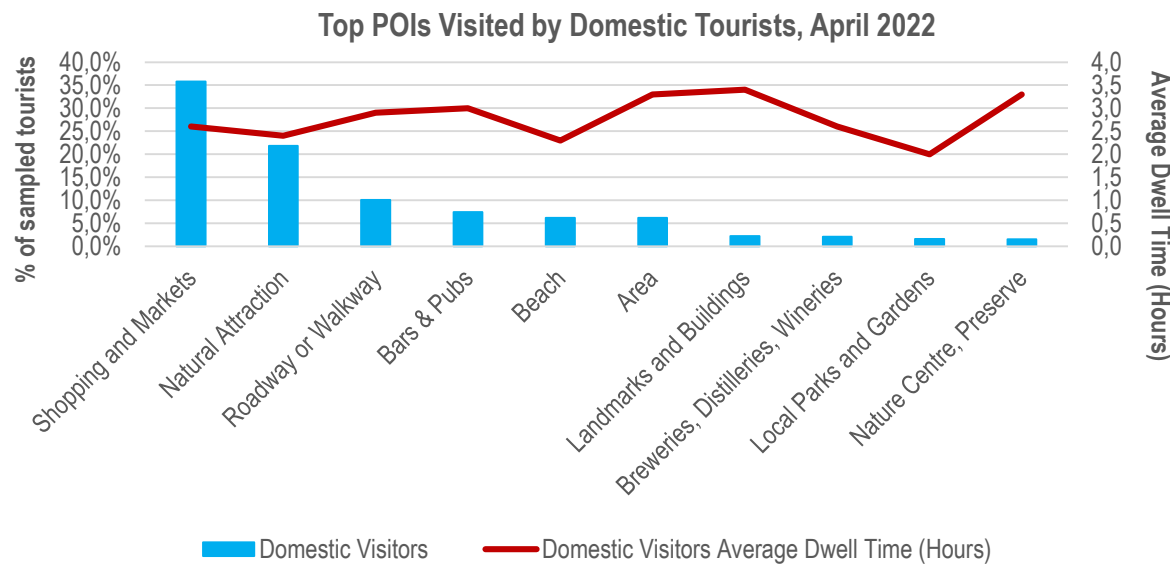
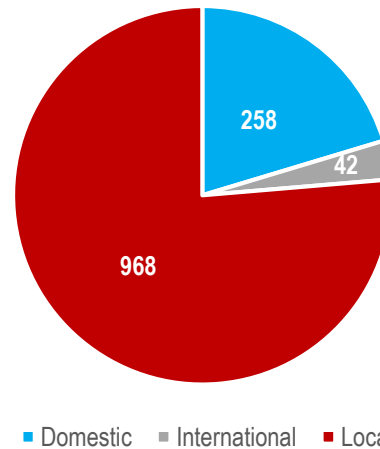# 7.3. Points of Interest (POIs) Visited

- Similar to domestic tourist trends, shopping and markets, natural attractions and bars and pubs, ranked as the top three points of interest for local visitors. Locals spent on average 2,1 hours at shops and markets, 2,6 hours at natural attractions and 2,7 hours at bars and pubs.

- Locals spent over 3 hours exploring Landmarks/Buildings and Areas which included the Cederberg Wilderness Area and Van Dyks Bay.

Top POIs Visited by Locals, April 2022

POI	% Sampled Tourists	Average Dwell Time (Hours)
Shopping and Markets	42,7%	2,1
Natural Attraction	18,4%	2,6
Bars and Pubs	13,6%	2,7
Roadway or Walkway	6,6%	2,8
Beach	6,5%	2,2
Breweries, Distilleries, Wineries	2,6%	2,5
Local Parks and Gardens	2,4%	2,3
Historical Sites & Heritage Locations	2,3%	2,6
Landmarks & Buildings	2,0%	3,3
Area	0,8%	3,5

Legend: Local Visitors / Local Average Dwell Time (Hours)

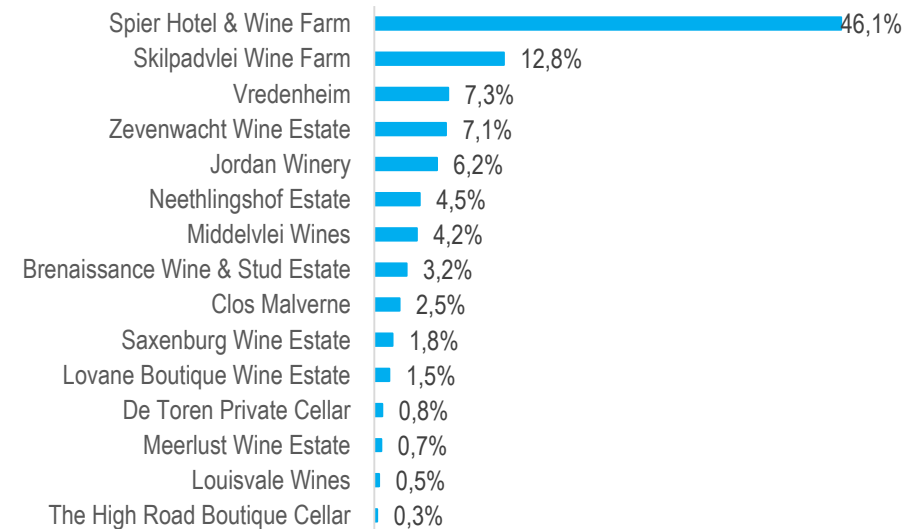**An Inspiring Place To Do Business**

7.4. Stellenbosch Valley Wine Route

- From a sample size of 1,268 tourists who visited the Stellenbosch Wine Route 76% were locals, 20% domestic and 3% international tourists.

- Spier was the most visited farm on the route, followed by Skilpadvlei and Vredenheim. From the list of top 15, De Toren Private Cellar had the longest dwell time of 4,4 hours (based on data from only 10 tourists).
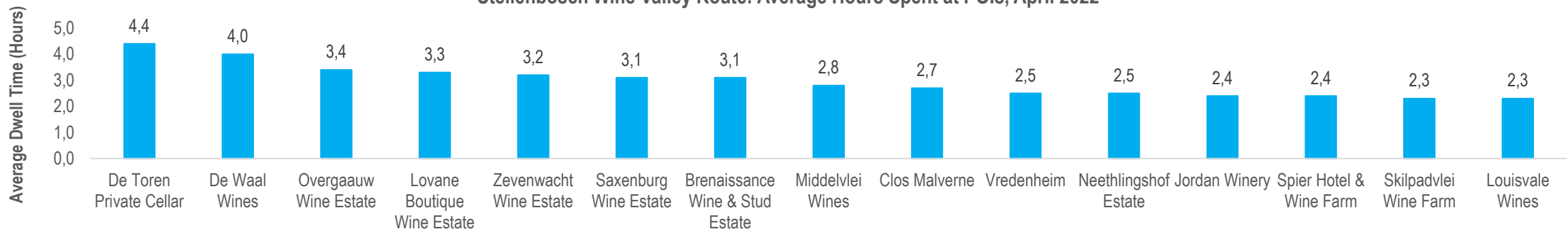
Sample Size: Visitors to Stellenbosch Wine Valley, April 2022

- Domestic
- International
- Local

Stellenbosch Wine Valley Route: Top POIs Visited, April 2022

POI	%
Spier Hotel & Wine Farm	46,1%
Skilpadvlei Wine Farm	12,8%
Vredenheim	7,3%
Zevenwacht Wine Estate	7,1%
Jordan Winery	6,2%
Neethlingshof Estate	4,5%
Middelvlei Wines	4,2%
Brenaissance Wine & Stud Estate	3,2%
Clos Malverne	2,5%
Saxenburg Wine Estate	1,8%
Lovane Boutique Wine Estate	1,5%
De Toren Private Cellar	0,8%
Meerlust Wine Estate	0,7%
Louisvale Wines	0,5%
The High Road Boutique Cellar	0,3%

Stellenbosch Wine Valley Route: Average Hours Spent at POIs, April 2022

Source: Rove, 2022

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.)
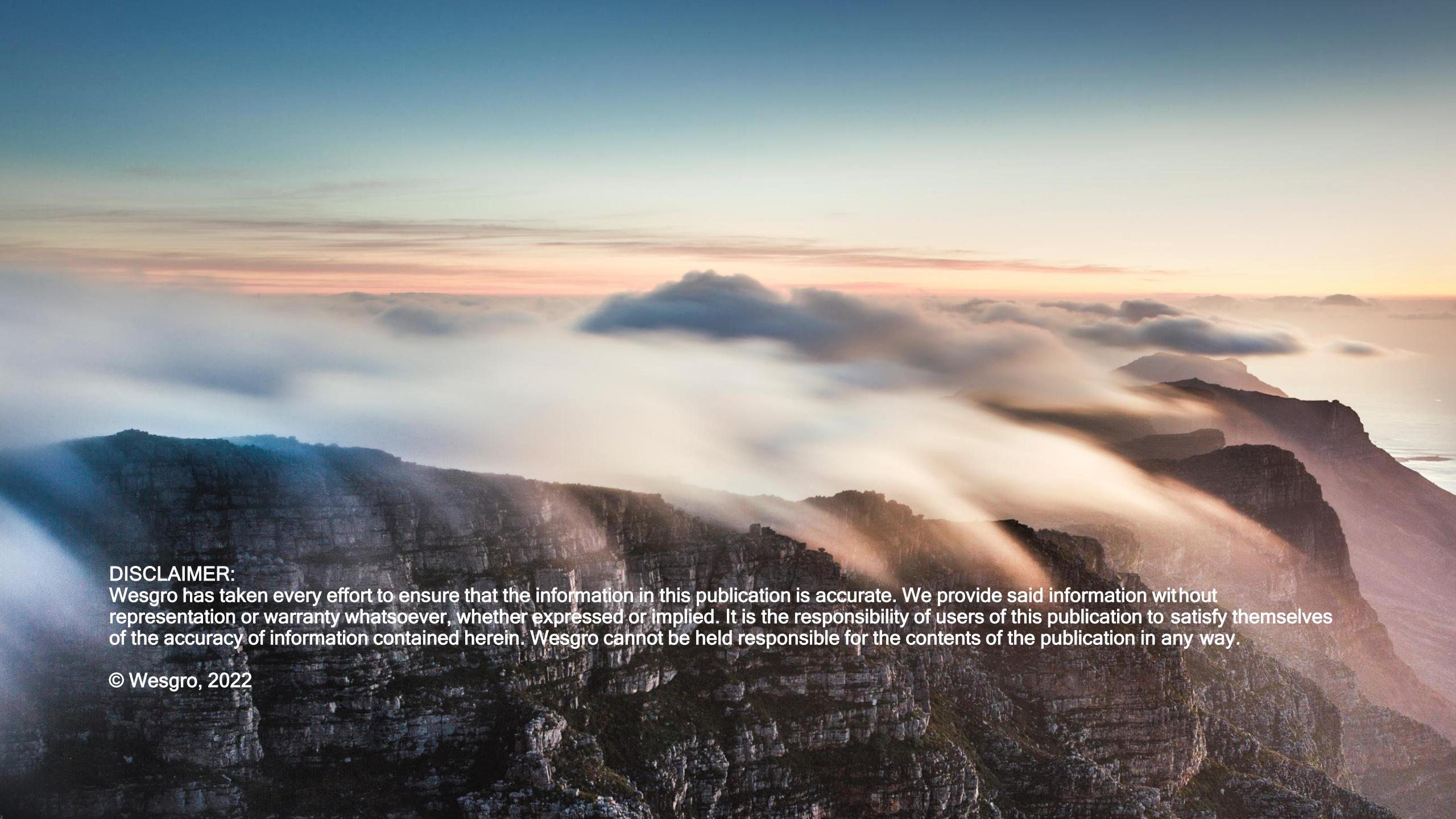
Source: Rove, 2022

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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:
- 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:
- 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:
- 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?
• **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

Source: Rove, 2022

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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, an d city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city d istricts.
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 a s "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 t he geography.

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