Tourism Research Overview December 2022

Cape Town & the Western Cape

WESGRO
cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

Contents

WESGRO
cape town & western cape
tourism, trade, investment, film

1. Key Findings

- The Western Cape enjoyed a bumper festive season following a successful year of aviation recovery in the province. Building on the positive recovery in 2022, the province can look forward to even more aviation and overall tourism growth in 2023. Key highlights of the overall tourism performance in 2022 are outlined below.

- 5.96 million domestic two-way passengers passed through Cape Town International Airport (CTIA) over the period Jan. – Dec. 2022; registering a 71% recovery vs. 2019.

- International two-way passengers through CTIA reached 1.89 million over the period Jan. – Dec. 2022; a 73% YTD recovery vs. 2019. December marked the highest number of international two-way passengers in 2022 and nearly fully recovered (96%) against December 2019.

- George Airport recorded 740,990 two-way passengers for the full year (2022) and recovered by 89% when compared to the performance in 2019.

- Between January and December 2022, UK ranked as the top source market to Cape Town (via air), followed by Germany, USA, Netherlands and France.

- Europe sustained its position as the Western Cape's top region for tourist arrivals, with 7 out of the top 10 source markets to Cape Town originating from the continent.

- In the month of December 2022, the following source markets to Cape Town fully recovered when compared to December 2019: USA (136%), Canada (112%), Belgium (109%), France (100%), India 100% and Zimbabwe (278%).

- Hotel occupancy for the Western Cape stood at 72% in December 2022, representing a full recovery rate of 106% when compared to December 2019 (68.1%). The Average Daily Rate (ADR) for the Western Cape grew to R2 302.37 and RevPAR (Revenue Per Available Room) reached R1 657.17. ADR exceeded December 2019 levels, recovering to 114% and REVPAR fully recovered by 121% against December 2019. With respect to year-on-year growth, hotel revenue (REVPAR) in the Western Cape increased by a remarkable 74% when compared to December 2021.

- Footfall to 24 participating attractions across the six regions of the Western Cape recorded a total of 749,261 visitors in December 2022, a 69,8% growth in the number of visitors when compared to December 2021 and 86% of what it was in December 2019.

- The top 5 highest year-on-year growth rates in December 2022 were recorded for Table Mountain National Park: Cape of Good Hope (159%), Cango Caves (126%), Table Mountain National Park: Boulders (119%), Robben Island (96%) and Table Mountain National Park (79%).

2. CPT INTERNATIONAL Terminal Passenger Performance

Year/Month	2019	2020	2021	2022						Full year 22
				Jul	Aug	Sept	Oct	Nov	Dec	
Two-way passengers	2 606 398	810 811	525 441	150 938	148 366	152 843	175 648	211 944	270 433	1 895 975
Passenger recovery*	100%	31%	20%	87%	83%	81%	83%	84%	96%	73%

* Recovery compared to same period in 2019

Passenger data source: ACSA
Air cargo data source: Seabury

Operating carriers
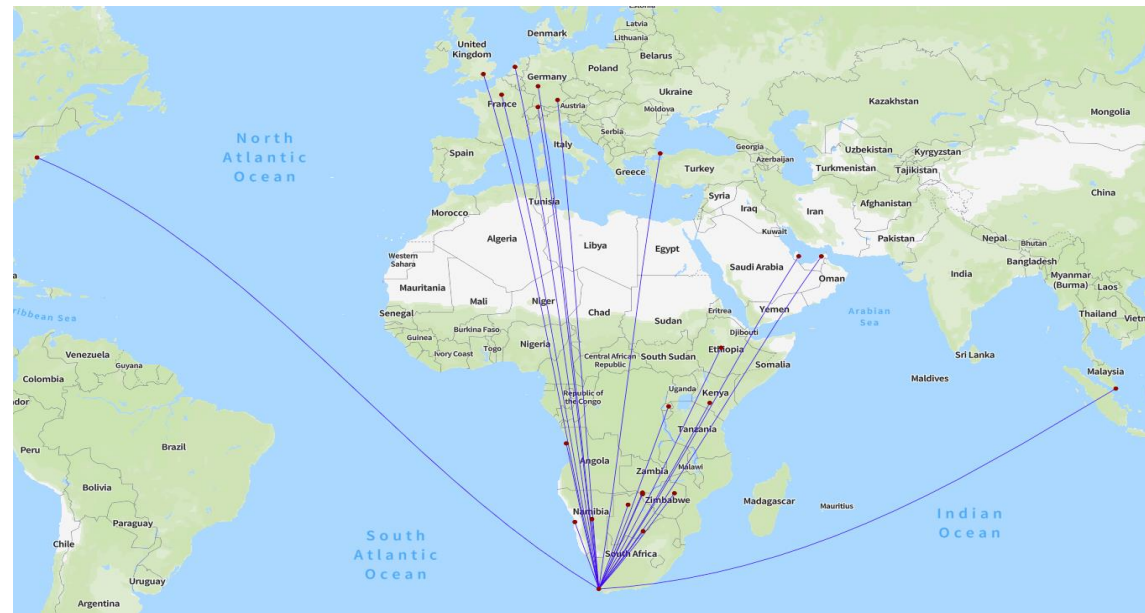
3. CPT DOMESTIC Terminal Passenger Performance

Year/Month	2019	2020	2021	2022						Full year 22
				Jul	Aug	Sept	Oct	Nov	Dec	
Two-way passengers	8 363 307	3 167 542	4 221 365	456 785	458 979	486 396	528 817	510 108	569 693	5 960 826
Passenger recovery*	100%	38%	50%	68%	67%	66%	73%	73%	72%	71%

* Recovery compared to same period in 2019

Passenger data source: ACSA
Air cargo data source: Seabury

Operating carriers
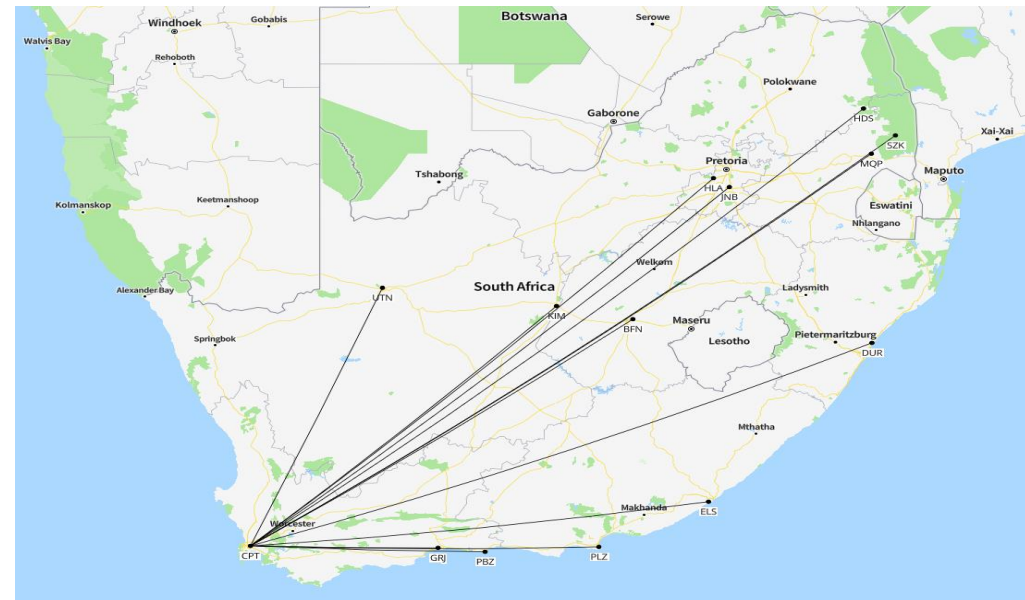
4. George Airport (GRJ) Passenger Performance

Year/Month	2019	2020	2021	2022						Full year 2022
				Jul	Aug	Sept	Oct	Nov	Dec	
Two-way passengers	832 981	340 438	536 886	62 926	60 240	60 790	63 922	59 518	63 399	740 990
Passenger recovery*	100%	41%	64%	103%	92%	86%	90%	84%	65%	89%

* Recovery compared to same period in 2019

Passenger data source: ACSA

Operating carriers

5. Cape Town Route and Airline Update
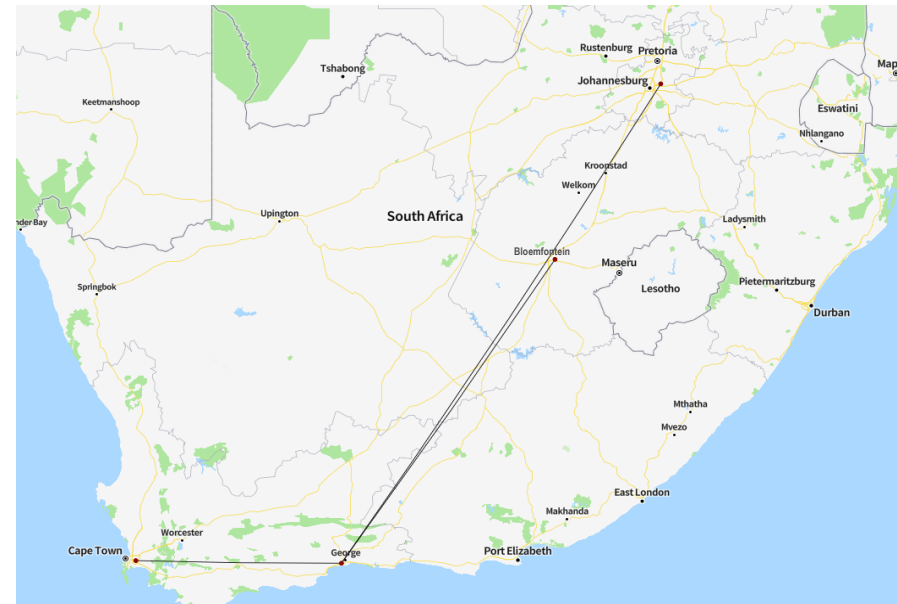
CPT International route and airline update – 12 January 2023
21 airlines, 27 destinations-191 flights pw – 198 from 1 Feb. 2023

Asia and Middle East

- **Emirates** operates daily, DXB-CPT. Will operate double daily from 1 Feb 2023
- **Qatar Airways**, double daily since 6 Jan, DOH-CPT
- **Singapore Airlines** daily service, SIN-JNB-CPT-JNB-SIN

Rest of Africa

- **Air Botswana**, Gaborone (GBE), three times per week
- **Ethiopian Airlines**, Addis Ababa (ADD), daily flight
- **FlyNamibia**, Windhoek (WDH), six time per week
- **Kenya Airways**, Nairobi (NBO) direct, twice per week, Nairobi – Livingstone (LVI), twice per week and Nairobi - Victoria Falls (VFA), three per week
- **TAAG**, Luanda (LAD), six times per week
- **RwandAir**, Kigali (KGL)-Harare (HRE), six times per week
- **Airlink**, Windhoek, three times a day
  Walvis Bay (WVB), daily
  Harare, daily
  Victoria Falls, six times per week
  Maun (MUB), daily
  Maputo (MPM), three times per week
- **Air Mauritius**, (MRU) - Mauritius, twice per week.

Europe

- **Lufthansa**, Frankfurt (FRA), three times per week Munich (MUC), seasonal daily flight
- **British Airways**, London Heathrow (LHR) double daily service. Seasonal London Gatwick (LGW) service three times per week.
- **KLM**, Amsterdam (AMS), operates 10 times per week
- **Turkish Airlines**, Istanbul, Daily flight
- **Edelweiss**, Seasonal Zurich (ZRH), three times a week
- **Air Belgium**, Seasonal – Brussels BRU-JNB-CPT-JNB-BRU, twice per week
- **Condor**, Seasonal Frankfurt (FRA) service, three times a week.
- **Virgin Atlantic**, London Heathrow, daily seasonal service
- **Air France**, Paris (CDG), seasonal service three times per week

North America

- **United Airlines**, Newark (EWR), year-round service, three times per week. Washington D.C (IAD) year-round service, three times per week
- **Delta Air Lines,** Atlanta (ATL) direct service, three times a week. Seasonal triangular route between *ATL-JNB-CPT-ATL* four times a week

CAPE TOWN AIR ACCESS
powered by WeSGRO

6. Top Source Markets to Cape Town (via air): Dec 2022

- In the month of **December 2022**, the United Kingdom led as the top source market to Cape Town (via air), closely followed by Germany and USA. The following source markets to Cape Town during December 2022 fully recovered when compared to December 2019: USA (136%), Canada (112%), Belgium (109%), France (100%), India 100% and Zimbabwe (278%).

Recovery in Top Source Markets to Cape Town (via air) and South Africa, Dec 2022 vs. Dec 2019

	United Kingdom	Germany	USA	Netherlands	France	Zimbabwe	Namibia	Switzerland	Italy	Angola	Belgium	Canada	India
Cape Town (via air)	20 669	15 034	13 775	6 121	3 335	2 629	1 965	2 241	1 961	1 284	2 127	2 296	1 407
South Africa	41 424	24 454	32 096	10 800	8 529	164 538	18 435	4 276	3 962	3 339	4 292	5 421	5 597
Cape Town Recovery	94%	91%	136%	98%	100%	278%	70%	80%	89%	58%	109%	112%	100%
SA Recovery	79%	72%	98%	81%	70%	75%	84%	75%	62%	64%	91%	83%	79%
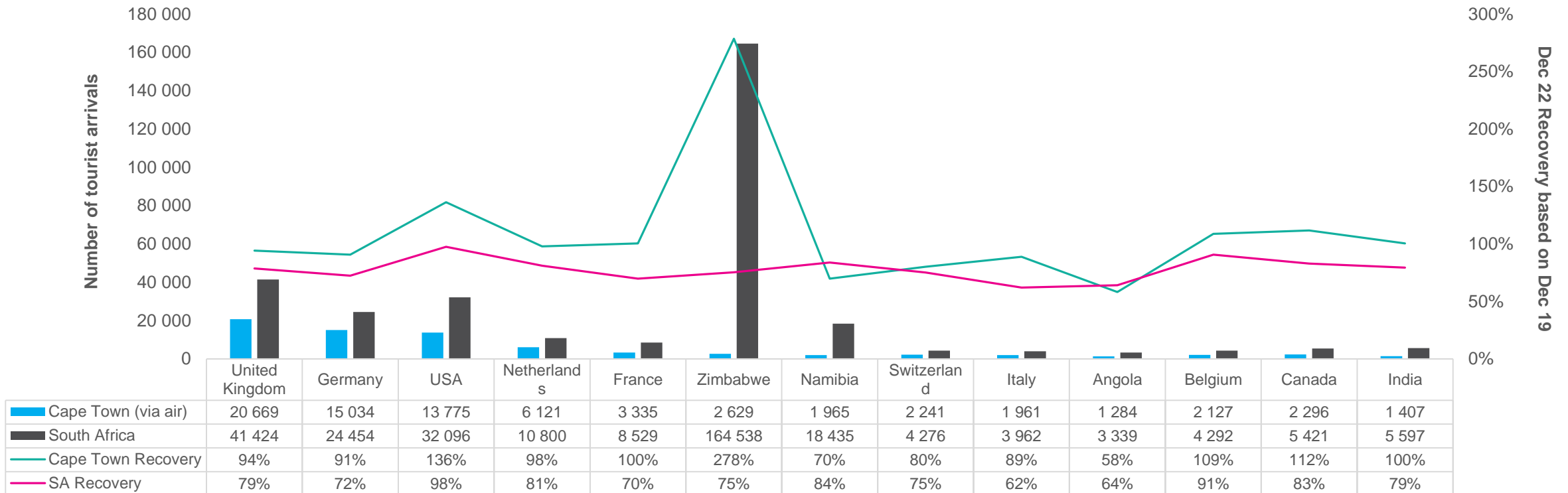
7. Top Source Markets to Cape Town (via air): YTD 2022

- For the full year 2022, all source markets to Cape Town recovered at a higher rate when compared to the national recovery for South Africa. Europe sustained its position as the Western Cape's top region for tourist arrivals, with 7 out of the top 10 source markets to Cape Town originating from the continent.

- Between January and December 2022, Cape Town recorded the largest number of tourist arrivals from the United Kingdom, followed by Germany, USA, Netherlands and France. In 2022, Zimbabwe ranked as the largest source market from the African continent, followed by Namibia and Angola.

Recovery in Top Source Markets to Cape Town (via air) and South Africa, Jan - Dec 2022 vs. Jan – Dec 2019

	United Kingdom	Germany	USA	Netherlands	France	Zimbabwe	Namibia	Switzerland	Italy	Belgium	Canada	Angola	India
Cape Town (via air)	108 210	93 315	81 898	39 151	21 685	17 952	17 910	15 390	13 219	12 363	12 119	11 406	10 817
South Africa	283 031	173 146	262 183	90 289	76 077	1 233 790	137 388	33 257	32 357	34 826	35 501	32 194	55 506
Cape Town Recovery	74%	72%	85%	73%	47%	187%	75%	67%	63%	74%	59%	52%	54%
SA Recovery	65%	54%	70%	63%	46%	55%	74%	60%	50%	64%	53%	52%	58%

Source: StatsSA, 2023

WESGRO
cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

8. Hotel Occupancy in the Western Cape

- **Occupancy** in the Western Cape, at **72,0%** in December 2022, **increased by 35,3%** when compared to the 53,2% occupancy in December 2021, reaching a **full recovery rate of 106%** when compared to the 68,1% occupancy recorded in December 2019.

- **The Average Daily Rate (ADR)** for the Western Cape grew to **R2 302.37** in December 2022 and **fully recovered by 114%** on its 2019 figure.

- At **R1 657.17** in December 2022, **RevPAR (Revenue Per Available Room) grew by 74,2%** against its 2021 figure and **fully recovered to 121%** of what it was in December 2019.

Western Cape Occupancy, Dec 2019-2022

68,1%

33,6%

53,2%

72,0%

% Occupancy

2019   2020   2021   2022
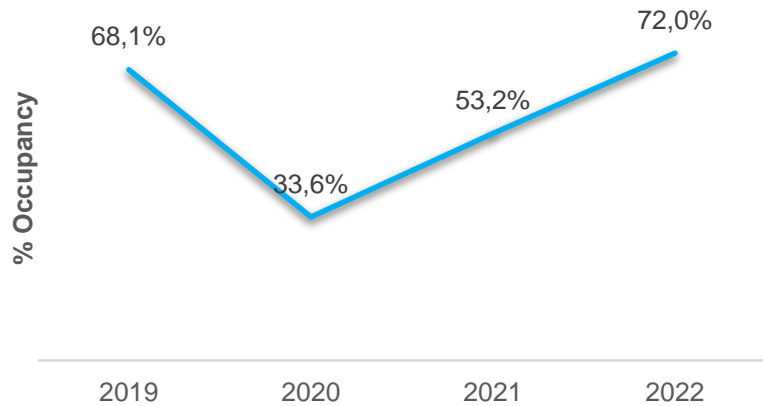
Source: STR, 2023

Western Cape ADR, Dec 2019-2022

R2 018,13

R1 502,31

R1 787,88

R2 302,37

Value (Rand)

2019   2020   2021   2022
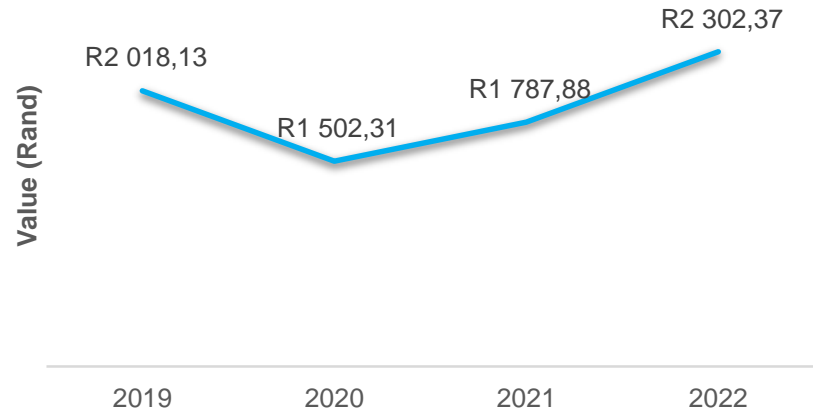
Source: STR, 2023

Western Cape RevPAR, Dec 2019-2022

R1 375,19

R 504,38

R 951,24

R1 657,17

Value (Rand)

2019   2020   2021   2022

Source: STR, 2023

wesgro
cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business
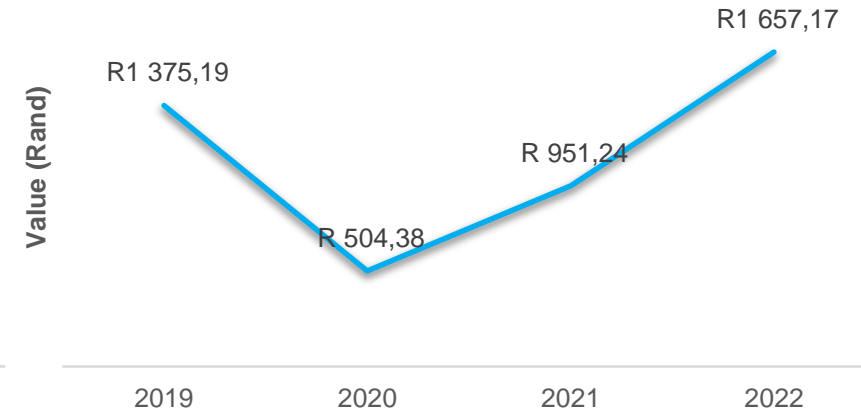
9. Western Cape Attractions

- Footfall to 24 participating attractions across the six regions of the Western Cape recorded a total of **749,261** visitors in December 2022, a **69,8% growth in the number of visitors** when compared to December 2021 and **86% of what it was in December 2019**.

- **The top 5 highest year-on-year growth** rates in December 2022 were recorded for Table Mountain National Park: Cape of Good Hope (159%), Cango Caves (126%), Table Mountain National Park: Boulders (119%), Robben Island (96%) and Table Mountain National Park (79%).

VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, DEC 2019 - 2022
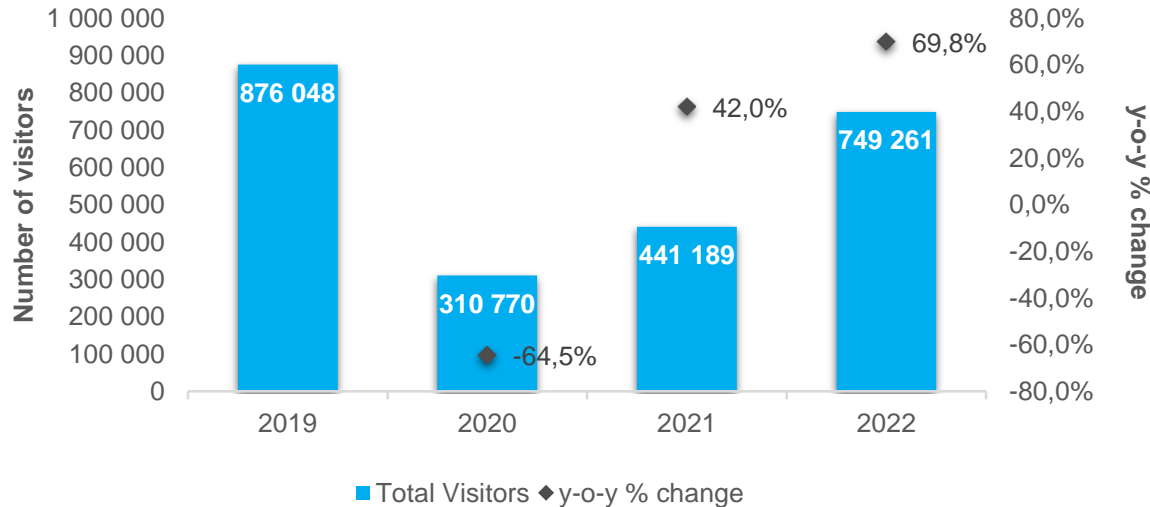
Western Cape Attractions	Dec 2021/2022 % Change	Dec 2019/2022 % Recovery
Cape Town		
Table Mountain Aerial Cableway	74%	99%
Table Mountain National Park	79%	85%
Table Mountain National Park: Boulders	119%	86%
Table Mountain National Park: Cape of Good Hope	159%	85%
Robben Island	96%	89%
Overberg		
Agulhas National Park	7%	68%
Bontebok National Park	10%	69%
Cape Agulhas Lighthouse	0%	63%
De Hoop Nature Reserve	-5%	88%
De Mond Nature Reserve	9%	99%
Harold Porter National Botanical Gardens	12%	92%
Kogelberg Nature Reserve	57%	121%
Stony Point	15%	68%
Shipwreck Museum	0%	57%
Garden Route & Klein Karoo		
Cango Caves	126%	79%
Tsitsikamma National Park	5%	70%
Wilderness National Park	8%	83%
Knysna National Park	-17%	104%
Weskus		
West Coast National Park	-8%	69%
!Khwa ttu	27%	108%
Winelands		
Protea Tractor Trips	39%	121%
Birds Paradise	-8%	82%
Viljoensdrift River Cruise	14%	263%
Cape Karoo		
Karoo National Park	12%	98%

Sources: LTO's, and Attractions, 2023

Visitor Trends
Mobile Location Data Insights

10. 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 sample of **53,856 domestic** and **2,795 international** tourists who visited the Western Cape in December 2022. Within the domestic data set, **23,270** of the sampled tourists were from the City of Cape Town and from the international sampled tourists, **616** were from the United Kingdom and **599** from the United States.

Source: Rove, 2023

Sample Size, Dec 2022

2 795

53 856

- Domestic
- International
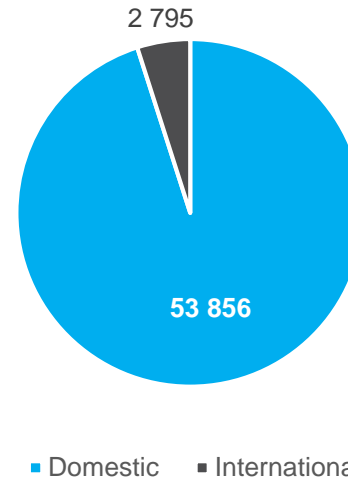
Domestic Origin Municipality, Dec 2022

Municipality	Value
Cape Town	23 270
Johannesburg	3 896
Tshwane	2 922
Ekurhuleni	2 060
Nelson Mandela Bay	1 946
Stellenbosch	1 389
eThekwini	1 208
Saldanha Bay	1 037
Drakenstein	945
Overstrand	895
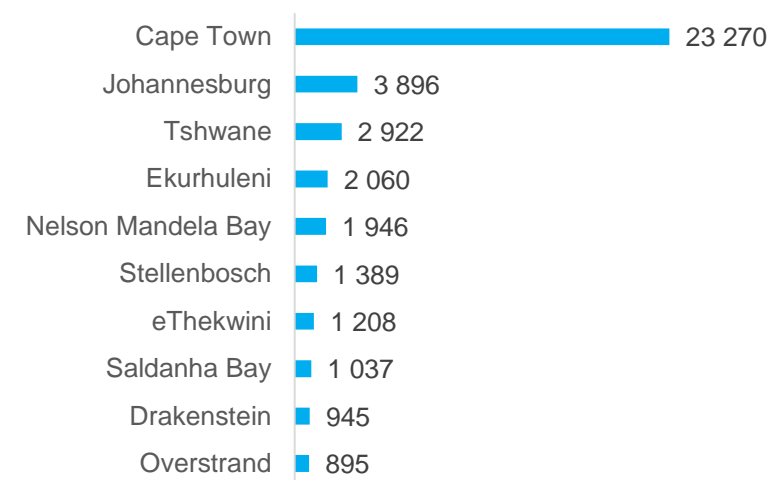
International Origin Country, Dec 2022

Country	Value
United Kingdom	616
United States	599
Australia	141
Netherlands	113
Germany	113
Mexico	97
Canada	78
United Arab Emirates	75
Saudi Arabia	66
Namibia	66
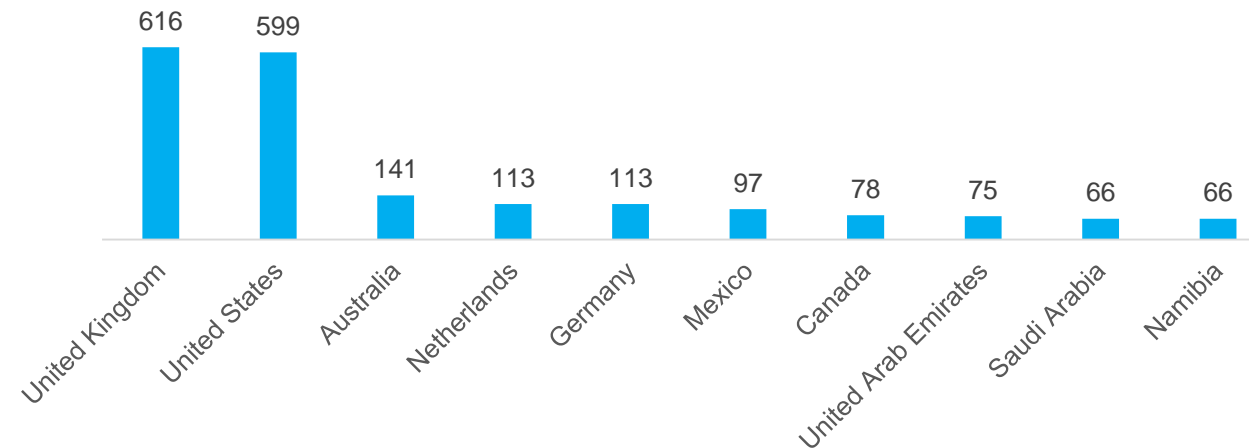
10.1. Mobile Insights: Domestic Visitor Trends

- In December 2022, **Winelands (41,4%) and Cape Town (26,5%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (3.4%) had the least.

- **Winelands (56,6%)** was the most popular region for domestic repeat visits, followed by **Cape Town (52,3%).**

Domestic Sample Size, Dec 2022

Region	Sample Size
Western Cape	53 856
Winelands	22 307
Cape Town	14 249
Overberg	6 549
Garden Route & Klein Karoo	6 285
Weskus	2 625
Cape Karoo	1 841
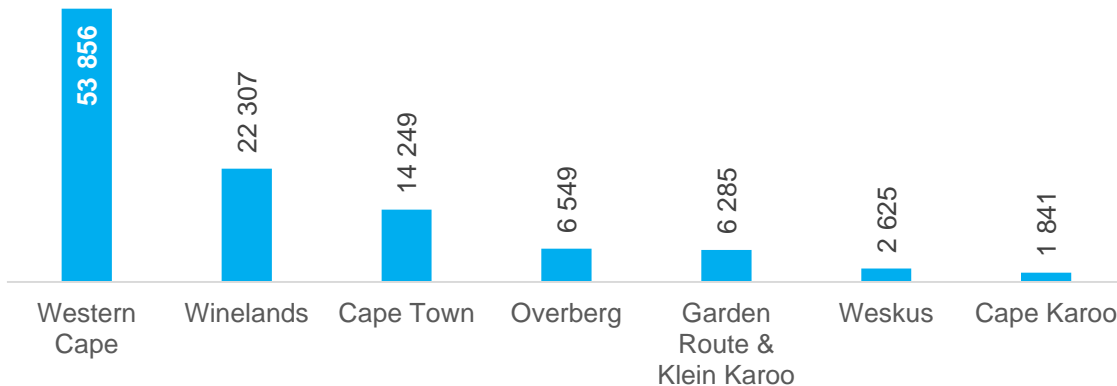
Domestic Repeat Visitors, Dec 2022

Region	Percentage
Western Cape	53,7%
Cape Karoo	33,2%
Overberg	40,9%
Cape Town	52,3%
Winelands	56,6%
Garden Route & Klein Karoo	43,0%
Weskus	43,1%

An Inspiring Place To Do Business
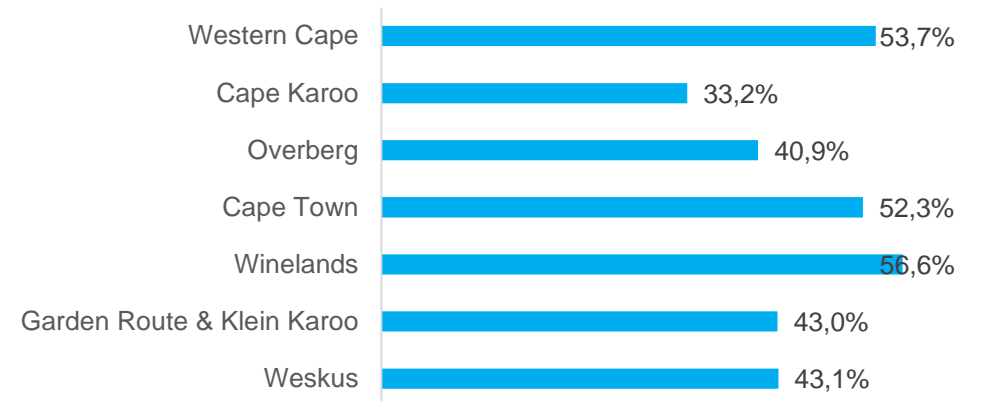
10.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent **the longest time in Cape Town (2,7 days) and the Garden Route & Klein Karoo (2,7 days)** during December 2022, and the shortest time in the Cape Karoo (1,4 days).

- **Over 60% of sampled tourists** stayed overnight in Cape Town as well as in the Garden Route & Klein Karoo, and at a slightly higher rate than the general average for the province (52,5%).

- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.

Average Length of Stay (LOS), Dec 2022

Region	LOS
Weskus	2,3
Garden Route & Klein Karoo	2,7
Winelands	2,2
Cape Town	2,7
Overberg	2,0
Cape Karoo	1,4
Western Cape	2,3

% Overnight Stays, Dec 2022

Region	%
Western Cape	52,5%
Cape Karoo	22,9%
Overberg	48,4%
Cape Town	62,0%
Winelands	47,1%
Garden Route & Klein Karoo	63,3%
Weskus	52,5%
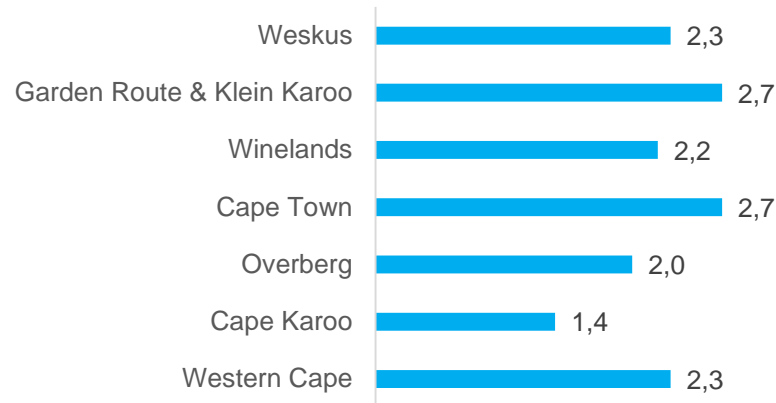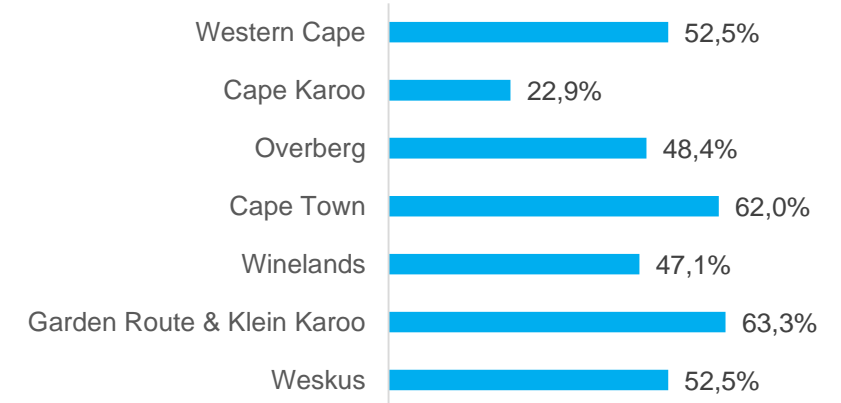
Average Length of Stay (Number of Days): Domestic, Dec 2022

Legend:
- Western Cape
- Cape Karoo
- Overberg
- Cape Town
- Winelands
- Garden Route & Klein Karoo

X-axis: 1 Day, 2 Days, 3 Days, 4 Days, 5 Days, 6 Days, 7 Days, 8 - 14 Days, 15 - 21 Days

Source: Rove, 2023

wesgro
cape town & western cape
tourism, trade, investment, film
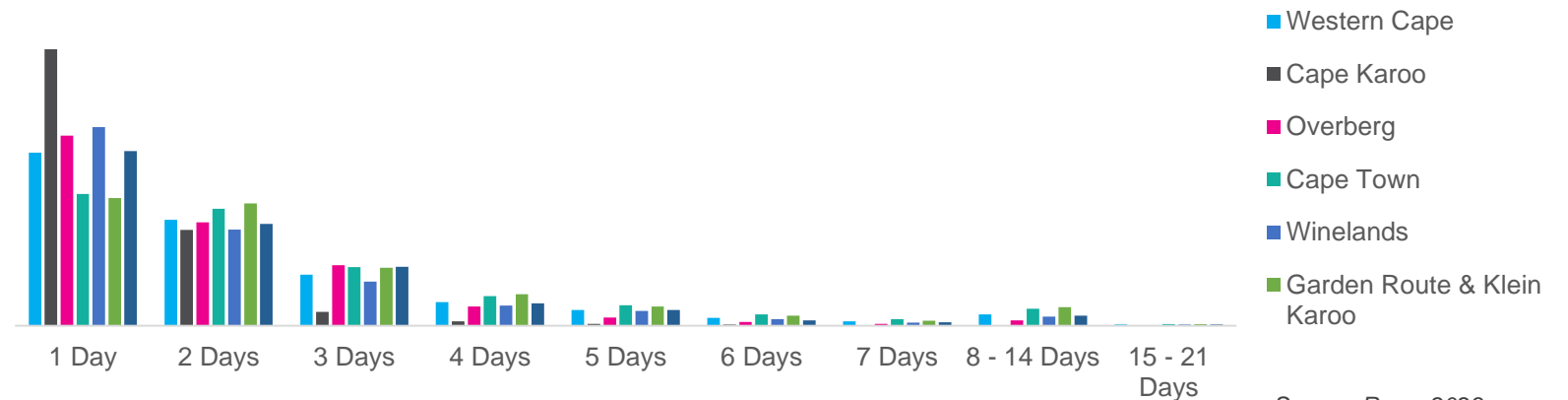
10.1. Mobile Insights: Domestic Visitor Trends

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

- In the Winelands, a Friday or Thursday were the most popular arrival days while Friday was the most common day for departure.

- Tourists to the Garden Route & Klein Karoo generally arrived on a Friday and departed on a Friday or Saturday.

Popular Arrival Days of the Week: Domestic, Dec 2022

	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	12,3%	10,7%	13,2%	17,2%	20,1%	14,1%	12,4%
Cape Karoo	11,1%	11,1%	12,7%	16,7%	21,5%	14,4%	12,4%
Overberg	9,4%	8,4%	10,7%	14,5%	28,6%	16,8%	11,6%
Cape Town	13,0%	12,5%	15,5%	18,4%	16,8%	11,1%	12,8%
Winelands	12,7%	10,5%	12,9%	17,3%	18,8%	15,3%	12,6%
Garden Route & Klein Karoo	12,8%	10,5%	12,8%	17,7%	21,3%	13,3%	11,7%
Weskus	11,6%	9,3%	11,4%	17,0%	23,3%	15,6%	11,7%

Popular Departure Days of the Week: Domestic, Dec 2022

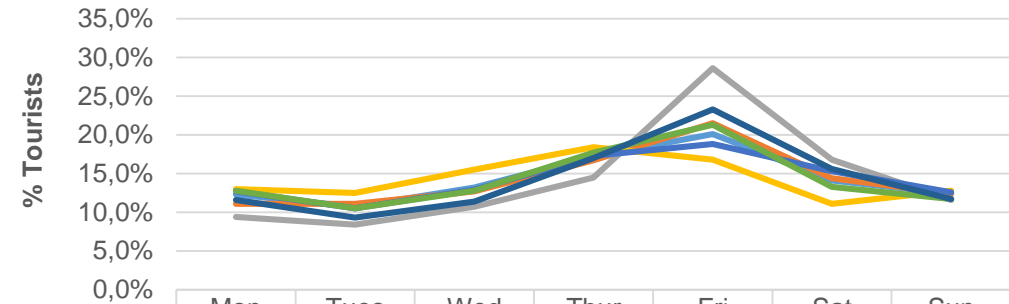|	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	11,1%	10,0%	9,8%	14,0%	20,5%	18,3%	16,3%
Cape Karoo	10,6%	11,0%	11,6%	15,2%	21,3%	17,4%	12,9%
Overberg	9,2%	8,0%	9,1%	12,5%	16,7%	20,0%	24,6%
Cape Town	13,1%	12,3%	10,6%	15,0%	19,5%	16,0%	13,5%
Winelands	10,2%	8,8%	9,1%	13,7%	23,1%	19,6%	15,5%
Garden Route & Klein Karoo	12,3%	11,0%	10,7%	13,7%	18,4%	17,5%	16,4%
Weskus	10,4%	9,7%	9,4%	14,1%	17,6%	19,2%	19,7%

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

- Cape Town arrival day were most common on a Thursday and departure was most popular on a Friday.

- Friday was the most popular arrival day in the Overberg and Sunday was its most common departure day.

- In the Weskus, Friday was the most popular arrival day and Sunday the most popular day for departure.

Source: Rove, 2023

An Inspiring Place To Do Business

10.2. Mobile Insights: International Visitor Trends

- **Over 60%** of the sampled international tourists visited Cape Town followed by 12,8% who visited the Winelands.

- Visitor trends for the Cape Karoo is based on a sample size of only 30 international tourists and therefore does not provide an accurate statistical representation for the region.

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

International Sample Size, Dec 2022

Region	Value
Western Cape	2 795
Cape Karoo	30
Overberg	197
Cape Town	1 755
Winelands	358
Garden Route & Klein Karoo	331
Weskus	124
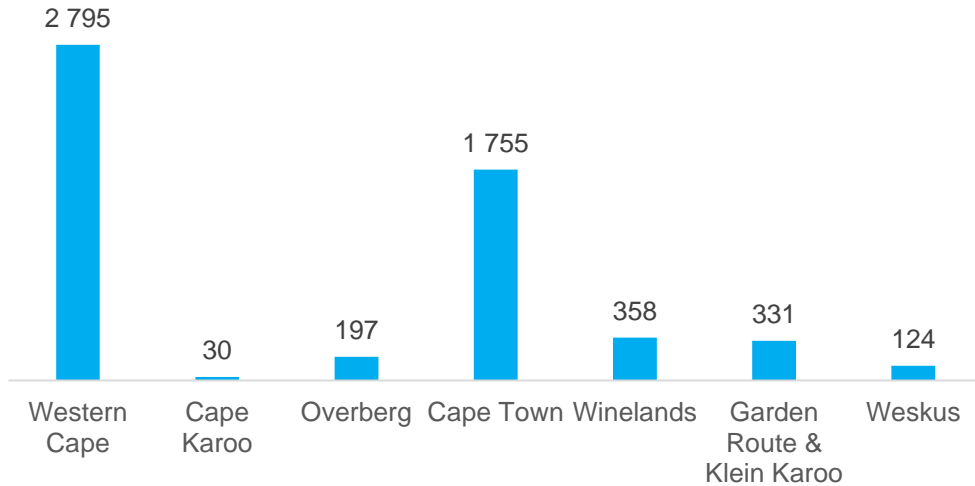
International Tourists Repeat Visits, Dec 2022

Region	Value
Western Cape	40,4%
Cape Karoo	47,8%
Overberg	31,0%
Cape Town	40,1%
Winelands	34,4%
Garden Route & Klein Karoo	38,3%
Weskus	34,0%

Source: Rove, 2023

wesgro
cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business
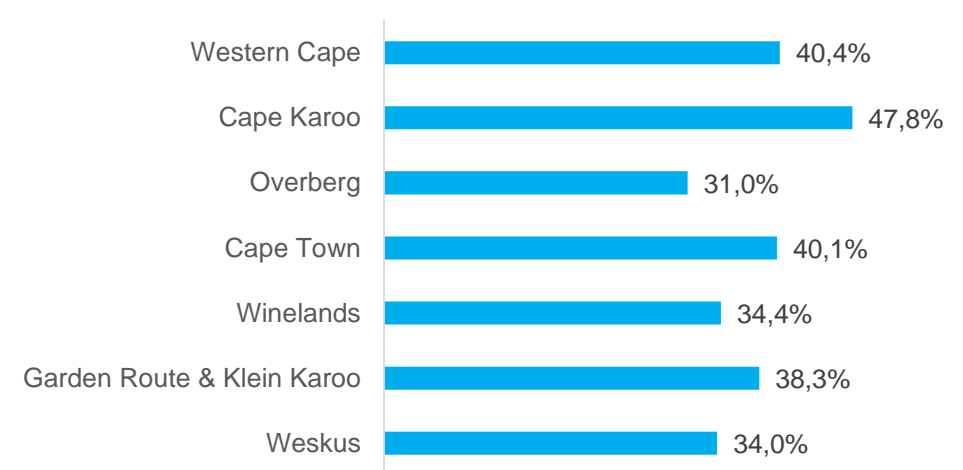
10.2. Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Cape Town (3,0 days) and Garden Route & Klein Karoo (2,8 days).

- Nearly 70% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and over 60% stayed overnight in Cape Town and the Overberg.

- 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), Dec 2022

Region	Days
Weskus	2,5
Garden Route & Klein Karoo	2,8
Winelands	2,4
Cape Town	3,0
Overberg	2,6
Cape Karoo	2,2
Western Cape	2,8

% Overnight Stays, Dec 2022

Region	%
Western Cape	63,5%
Cape Karoo	40,0%
Overberg	63,5%
Cape Town	65,2%
Winelands	54,5%
Garden Route & Klein Karoo	68,9%
Weskus	56,5%
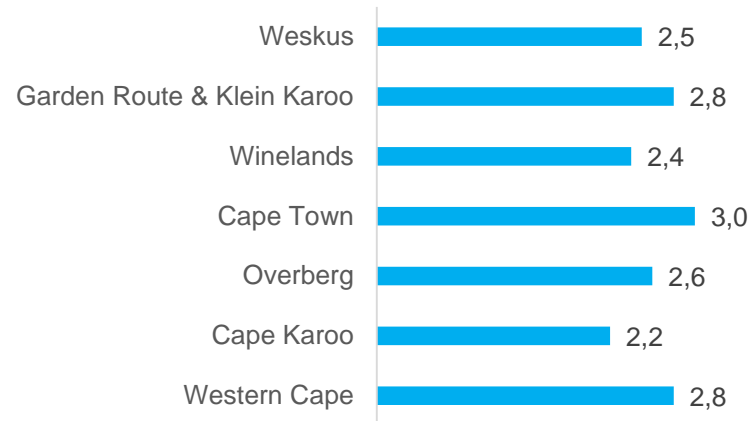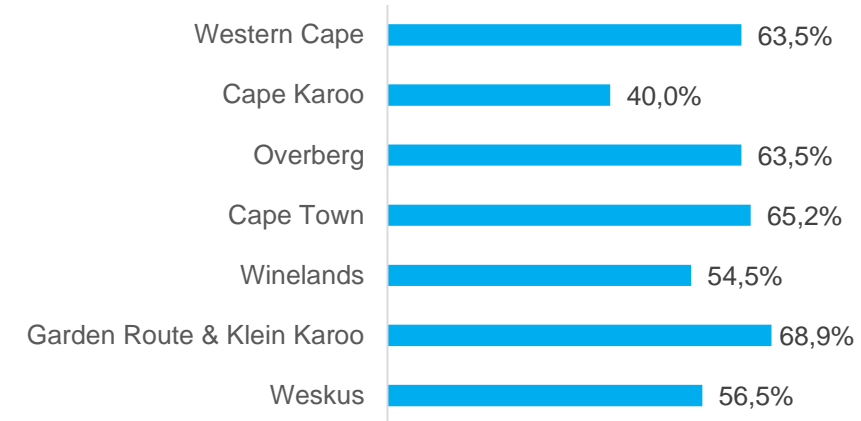
Average Length of Stay (Number of Days): International, Dec 2022

Legend:
- Western Cape
- Cape Karoo
- Overberg
- Cape Town
- Winelands
- Garden Route & Klein Karoo
- Weskus

X-axis: 1 Day, 2 Days, 3 Days, 4 Days, 5 Days, 6 Days, 7 Days, 8 - 14 Days, 15 - 21 Days

Source: Rove, 2023

An Inspiring Place To Do Business

wesgro
cape town & western cape
tourism, trade, investment, film
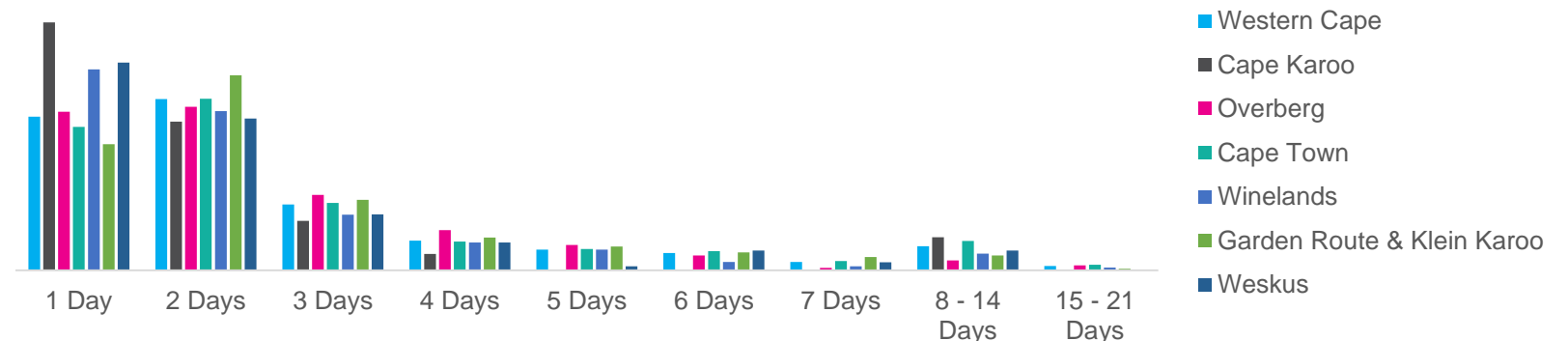
10.2. Mobile Insights: International Visitor Trends

- During December 2022, international tourists to the province mainly arrived on a Friday and departed on a Saturday.

- In the Winelands, a Friday was the most popular arrival day and Saturday the most common day for departures.

- International tourists to the Garden Route & Klein Karoo arrived mostly on a Friday and departed on a Saturday.

Popular Arrival Days of the Week: International, Dec 2022

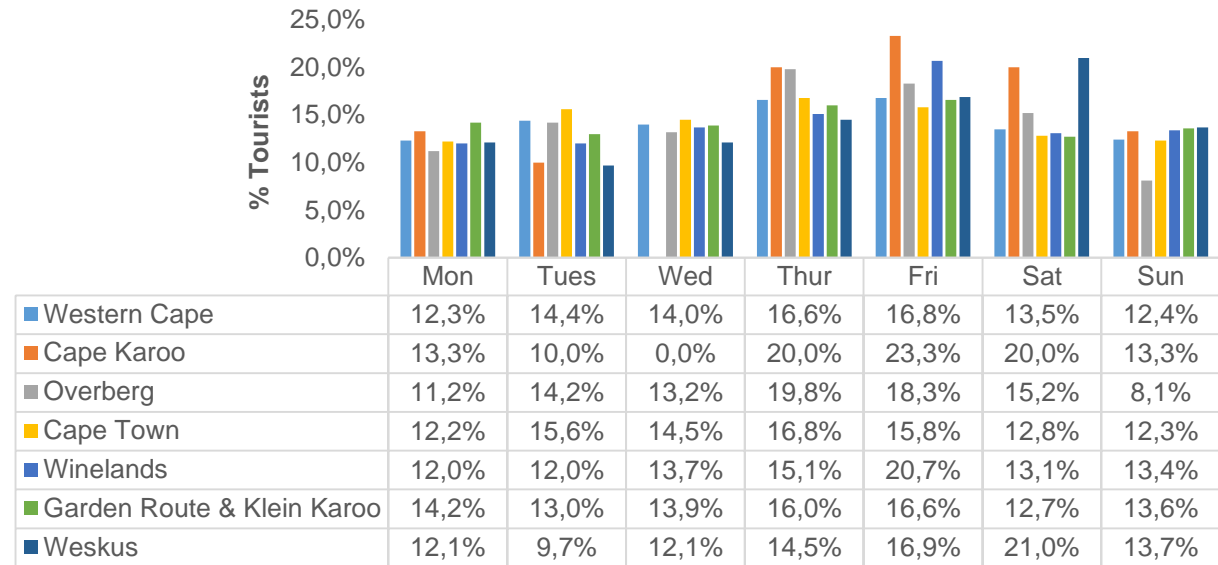|	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	12,3%	14,4%	14,0%	16,6%	16,8%	13,5%	12,4%
Cape Karoo	13,3%	10,0%	0,0%	20,0%	23,3%	20,0%	13,3%
Overberg	11,2%	14,2%	13,2%	19,8%	18,3%	15,2%	8,1%
Cape Town	12,2%	15,6%	14,5%	16,8%	15,8%	12,8%	12,3%
Winelands	12,0%	12,0%	13,7%	15,1%	20,7%	13,1%	13,4%
Garden Route & Klein Karoo	14,2%	13,0%	13,9%	16,0%	16,6%	12,7%	13,6%
Weskus	12,1%	9,7%	12,1%	14,5%	16,9%	21,0%	13,7%

Popular Departure Days of the Week: International, Dec 2022

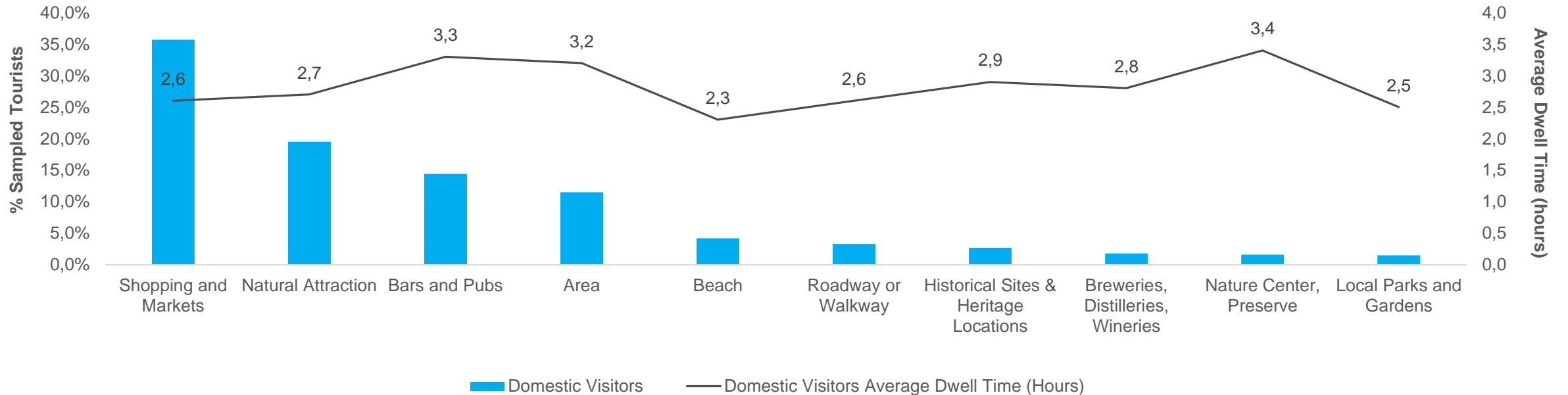|	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	12,0%	12,0%	10,2%	15,9%	17,4%	18,9%	13,6%
Cape Karoo	3,3%	10,0%	10,0%	20,0%	20,0%	20,0%	16,7%
Overberg	8,1%	11,7%	10,7%	13,7%	18,3%	20,8%	16,8%
Cape Town	12,3%	12,7%	10,2%	16,5%	17,0%	18,2%	13,0%
Winelands	8,9%	10,3%	10,3%	13,7%	19,8%	22,9%	14,0%
Garden Route & Klein Karoo	16,0%	11,2%	10,3%	15,7%	16,6%	17,5%	12,7%
Weskus	14,5%	10,5%	8,1%	16,1%	15,3%	17,7%	17,7%

- The sampled tourists (30) in the Cape Karoo, arrived on a Friday and departed on either a Thursday, Friday or Saturday.

- Cape Town arrival day was most common on a Thursday and departure was most popular on a Saturday.

- Thursday or Friday was the most popular arrival days in the Overberg and a Saturday the most common departure day.

- In the Weskus, Saturday was popular for arrival and departure most common on a Saturday or Sunday.

An Inspiring Place To Do Business

10.3. Points of Interest (POIs) Visited: Domestic Tourists

- Shopping and markets was the most popular type of attraction visited by domestic tourists with an average dwell time of 2.6 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront were popular among domestic tourists. On average, domestic visitors spent the longest time at Cape Point and Knysna Waterfront with a dwell time of 3.1 hours each.
- Bars & Pubs were the third most popular point of interest and domestic tourists spent on average 3.3 hours at the location.
- Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked fourth among the top POIs visited by domestic tourists, with an average dwell time of 3.2 hours.

Top POIs Visited by Domestic Tourists, Dec 2022

Legend: Domestic Visitors | Domestic Visitors Average Dwell Time (Hours)

Dwell time values shown: Shopping and Markets 2,6; Natural Attraction 2,7; Bars and Pubs 3,3; Area 3,2; Beach 2,3; Roadway or Walkway 2,6; Historical Sites & Heritage Locations 2,9; Breweries, Distilleries, Wineries 2,8; Nature Center, Preserve 3,4; Local Parks and Gardens 2,5
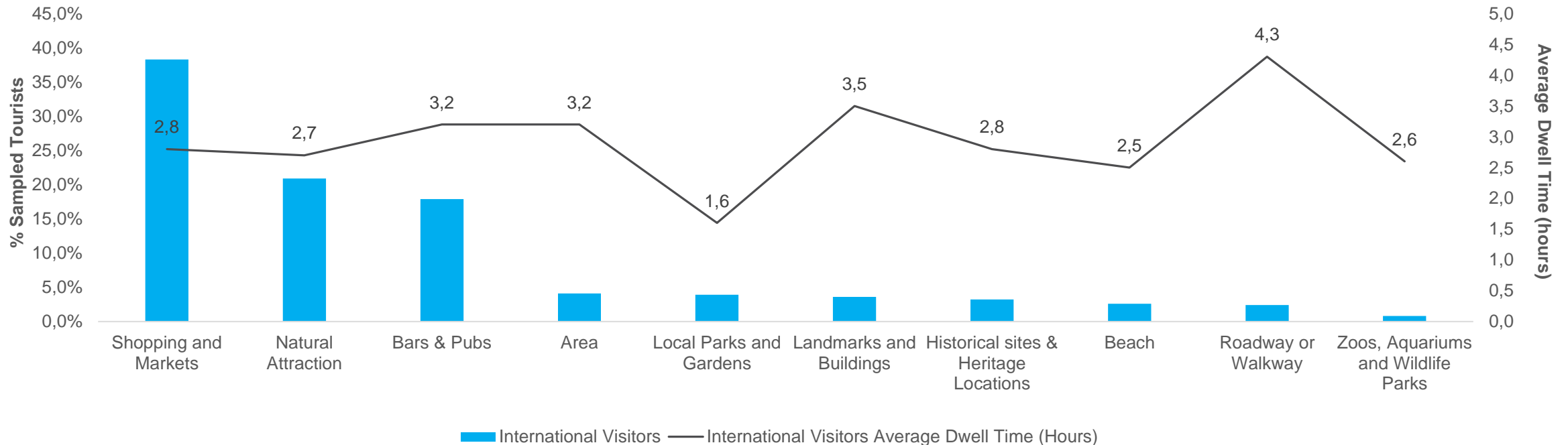
10.3. Points of Interest (POIs) Visited: International Tourists

- Shopping and markets was the most popular type of attraction visited by international tourists and they shopped on average for 2.8 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront were among the top with international tourists.
- Bars & Pubs were the third most popular point of interest for international tourists who spent on average 3.2 hours at the location.
- Among the top 10 POIs visited, international tourists spent the longest time at roadways or walkways (4.3 hours).
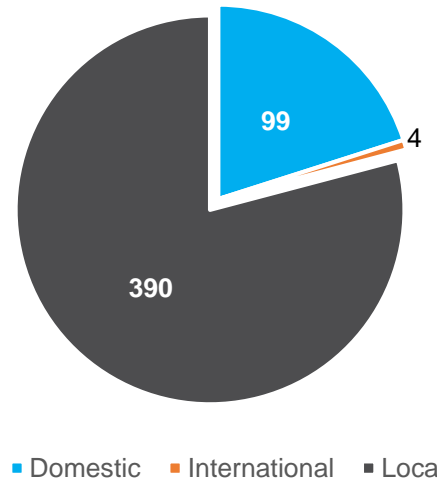
Top POIs Visited by International Tourists, Dec 2022

Legend: International Visitors — International Visitors Average Dwell Time (Hours)

Source: Rove, 2023
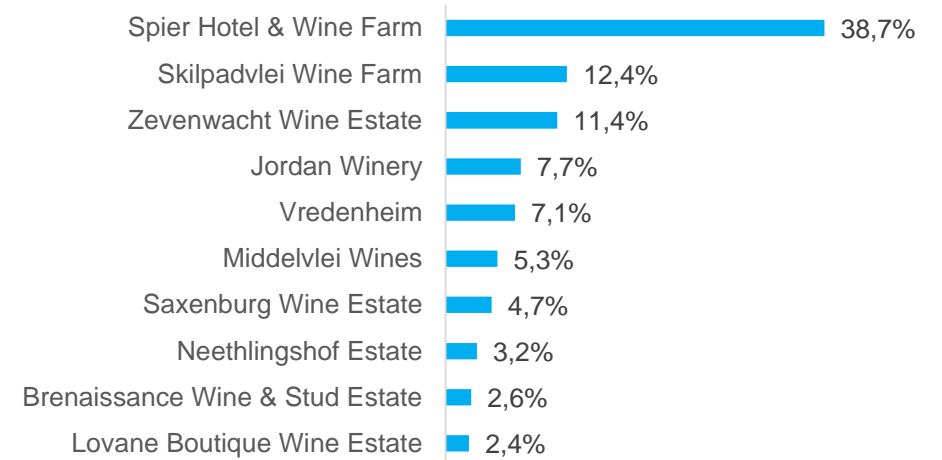
An Inspiring Place To Do Business

10.4. Stellenbosch Valley Wine Route

- From a sample size of **493 tourists** who visited the Stellenbosch Wine Route, 79% were locals, 20% domestic and 1% were international.

- Spier was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht Wine Estates.

- With respect to the average hours spent at the Wine Estates, De Waal Wines (7,5 hours) and Jordan Winery (3,1 hours) reflected the longest dwell time for December 2022.
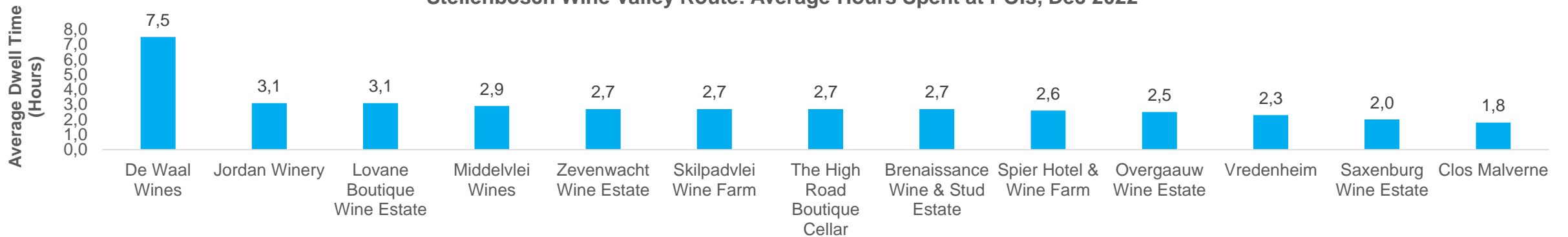
Sample Size: Visitors to Stellenbosch Wine Valley, Dec 2022

- Domestic - International - Local

Stellenbosch Wine Valley Route: Top POIs Visited, Dec 2022

POI	%
Spier Hotel & Wine Farm	38,7%
Skilpadvlei Wine Farm	12,4%
Zevenwacht Wine Estate	11,4%
Jordan Winery	7,7%
Vredenheim	7,1%
Middelvlei Wines	5,3%
Saxenburg Wine Estate	4,7%
Neethlingshof Estate	3,2%
Brenaissance Wine & Stud Estate	2,6%
Lovane Boutique Wine Estate	2,4%

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

POI	Average Dwell Time (Hours)
De Waal Wines	7,5
Jordan Winery	3,1
Lovane Boutique Wine Estate	3,1
Middelvlei Wines	2,9
Zevenwacht Wine Estate	2,7
Skilpadvlei Wine Farm	2,7
The High Road Boutique Cellar	2,7
Brenaissance Wine & Stud Estate	2,7
Spier Hotel & Wine Farm	2,6
Overgaauw Wine Estate	2,5
Vredenheim	2,3
Saxenburg Wine Estate	2,0
Clos Malverne	1,8

Source: Rove, 2023

An Inspiring Place To Do Business

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.)
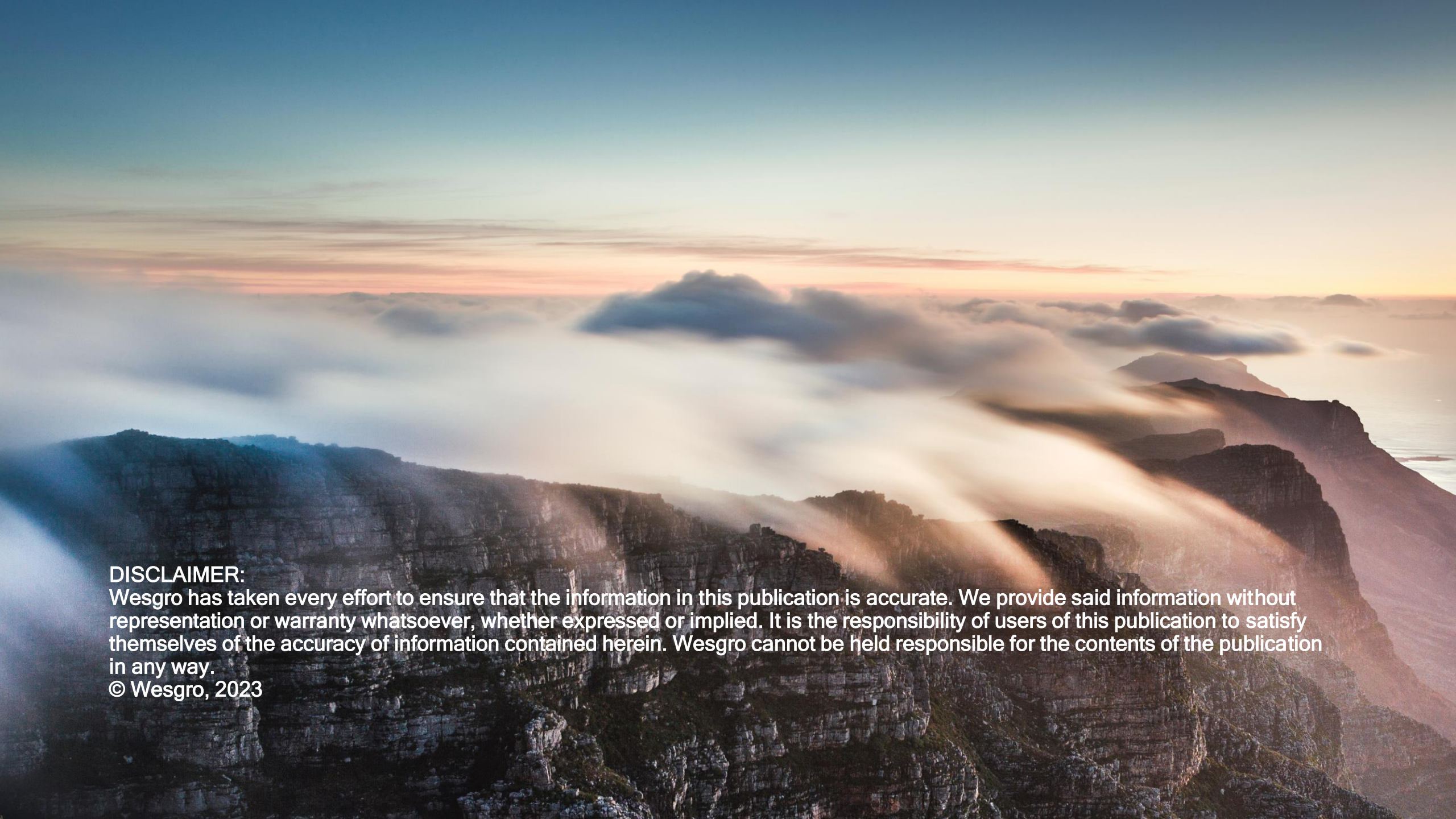
Source: Rove, 2023

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

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

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, 2023

WESGRO
cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

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 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 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.

An Inspiring Place To Do Business