



# Tourism Research Overview

## February 2023

### Cape Town & the Western Cape

**WESGRO**

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

An Inspiring Place To Do Business

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# Key Findings

Following a bumper festive season, all indications are pointing towards the Western Cape continuing a positive trajectory and strong recovery into the year 2023. Key highlights of the overall tourism performance in February 2023 are outlined below.

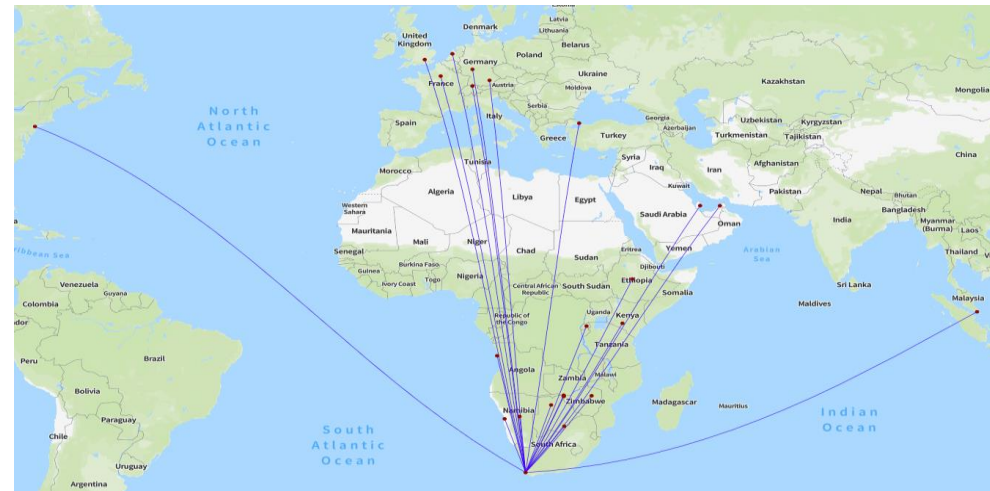
- 507,787 domestic two-way passengers passed through Cape Town International Airport (CTIA) during February 2023; registering a 72% recovery vs. February 2019.
- International two-way passengers through CTIA reached 258,970 in February 2023; and **fully recovered against February 2019, reaching 100%**.
- George Airport recorded 59,184 two-way passengers in February 2023 and recovered by 88% when compared to the performance in February 2019.
- In February 2023, Cape Town recorded a total of 101,444 tourist arrivals via air, of which 92% originated from overseas markets and 8% from the African continent. For the month of February 2023, Cape Town recorded the highest number in tourist arrivals from overseas markets (93,720) amongst South Africa's three key airports; Cape Town International Airport, OR Tambo and King Shaka (StatsSA data).
- Across the same period, the United Kingdom led as the top source market to Cape Town (via air), closely followed by Germany, USA, Netherlands and France, ranking in the top 5 positions. The European market is upholding a remarkable recovery with 7 out of the top 10 source markets to Cape Town (via air) originating from the continent.
- Apart from France (78% recovery) and Switzerland (87% recovery), **8 out of the top 10 source markets to Cape Town (via air) fully recovered for January and February 2023 (cumulatively)** against the same period in 2019. These markets included the UK (106%), Germany (111%), USA (163%), Netherlands (120%), Canada (108%), Belgium (120%), Italy (104%) and Zimbabwe (148%).
- Footfall to 21 participating attractions across the six regions of the Western Cape recorded a total of 529,622 visitors in February 2023, a 90% growth in the number of visitors when compared to February 2022 and 80% of what it was in February 2019.
- The top 5 highest year-on-year growth rates in February 2023 were recorded for Viljoensdrift River Cruise (697%), Cango Caves (175%), Robben Island (124%), Table Mountain National Park: Boulders (123%) and Table Mountain National Park: Cape of Good Hope (117%).

# International passengers at full recovery in Feb 2023

- International two-way passengers through CTIA reached **1.89 million** over the period Jan. – Dec 2022; **73% recovery vs. 2019**.
- Recovery remained strong into 2023, reaching **97% in January** and **full recovery in February**.

Year/Month	2019	2020	2021	2022	2022 month			2023 month	
					Oct	Nov	Dec	Jan	Feb
Two-way passengers	2 606 398	810 811	525 441	1 895 975	175 648	211 944	270 433	280 430	258 970
Passenger recovery*	<b>100%</b>	<b>31%</b>	<b>20%</b>	<b>73%</b>	<b>83%</b>	<b>84%</b>	<b>96%</b>	<b>97%</b>	<b>100%</b>

## Operating carriers

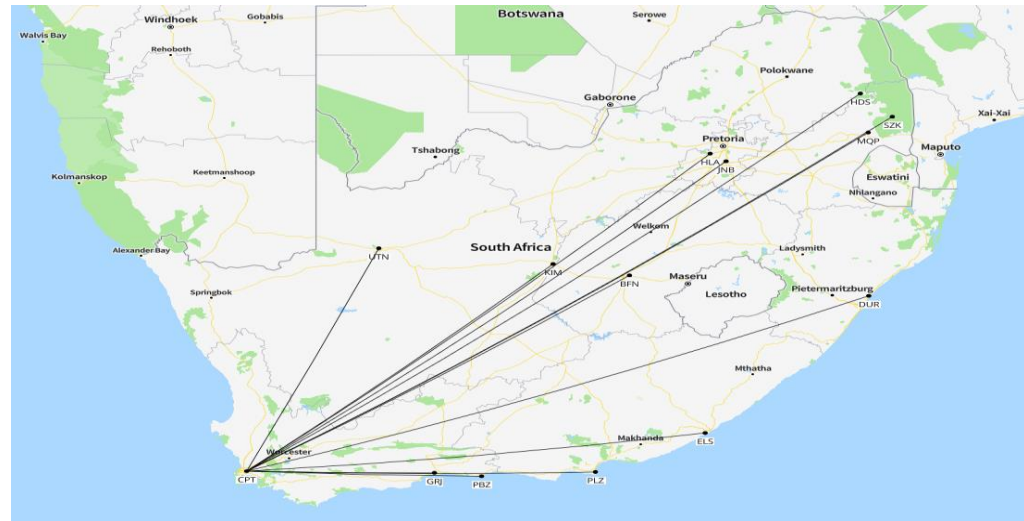


# Domestic passengers at 72% recovery in Feb 2023

- Domestic two-way passengers through CTIA reached **5.96 million** over the period Jan. – Dec 2022; **71% recovery vs. 2019** and remaining at a steady rate of over 70% between January and February 2023.

Year/Month	2019	2020	2021	2022	2022 month			2023 month	
					Oct	Nov	Dec	Jan	Feb
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	528 817	510 108	569 693	515 017	507 787
Passenger recovery*	100%	38%	50%	71%	73%	73%	72%	74%	72%

## Operating carriers



# George Airport reaches close to 90% recovery in Feb 2023

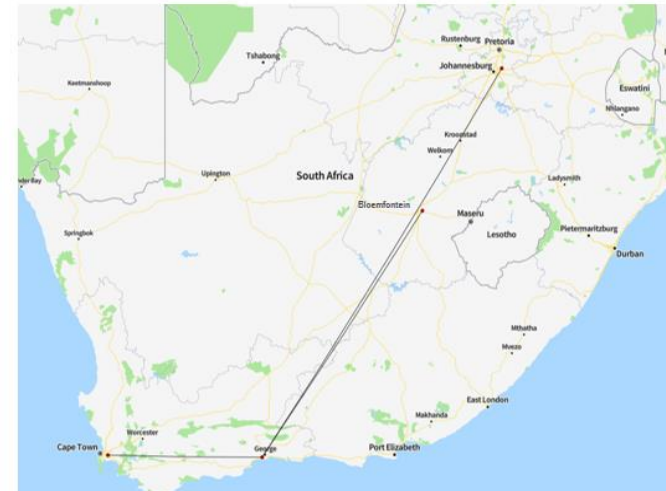
- George Airport two-way passengers reached **740,990** over the period Jan. – Dec 2022; **89% recovery vs. 2019** and remained strong with **88%** in February 2023.

Year/Month	2019	2020	2021	2022	2022			2023	
					Oct	Nov	Dec	Jan	Feb
Two-way passengers	832 981	340 438	536 886	740 990	63 922	59 518	63 399	63 367	59 184
Passenger recovery*	100%	41%	64%	89%	90%	84%	65%	84%	88%

## Operating carriers






## Inbound frequency by origin for Feb 2023











# CPT International Route & Airline Update: 6 March 2023

## 21 Airlines, 27 Destinations and 199 Flights per Week

### Asia and Middle East

-  **Emirates**, DXB-CPT, double daily since 1 Feb
-  **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, 4 additional flights from 26 March
-  **Fly Namibia**, Windhoek (WDH), six times 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), four times per week
-  **Air Mauritius**, (MRU) - Mauritius, twice per week, restarting 19 March

### 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**, Year-round – 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

# Performance of Air Arrivals to Cape Town: Feb 2023

- In the month of **February 2023**, Cape Town recorded a total of 101,444 tourist arrivals via air, of which 92% originated from overseas markets and 8% from the African continent. **In February 2023, Cape Town welcomed the largest share of overseas tourist arrivals via air (93,720), across South Africa's three key airports identified below.**

TOURIST ARRIVALS TO SOUTH AFRICA BY AIRPORT, FEBRUARY 2023			
Source Market	Cape Town	OR Tambo	King Shaka
Overseas Tourist Arrivals	93,720	83,916	2,012
Africa Tourist Arrivals	7,608	35,817	249
Total Tourist Arrivals	101,444	120,359	2,264
Overseas % Share of Total Tourists	<b>92%</b>	<b>70%</b>	<b>89%</b>

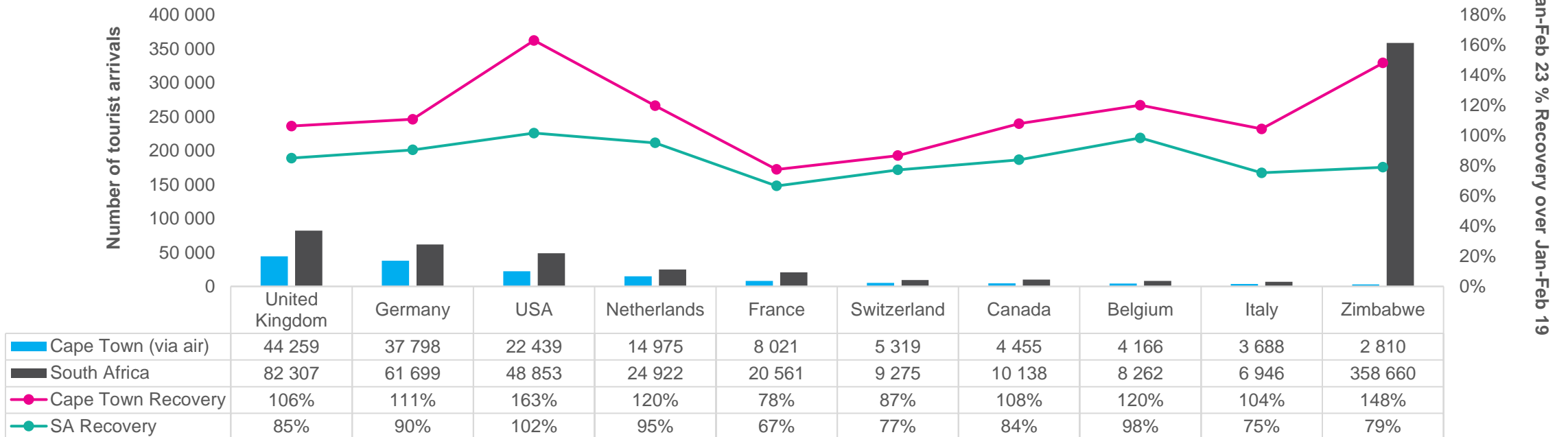
Source: StatsSA, 2023



# Top Markets to Cape Town (via air): YTD Feb 2023

- **As at February 2023**, the **United Kingdom led as the top source market to Cape Town (via air)**, closely followed by Germany, USA, Netherlands and France in the top 5 positions. The European market is recovering remarkably well **with 7 out of the top 10 source markets to Cape Town originating from the continent**.
- Apart from France (78% recovery) and Switzerland (87% recovery), **8 out of the top 10 source markets to Cape Town (via air) fully recovered for January and February 2023 (cumulatively)** against the same period in 2019. These markets included the UK (106%), Germany (111%), USA (163%), Netherlands (120%), Canada (108%), Belgium (120%), Italy (104%) and Zimbabwe (148%).

Recovery in Top 10 Source Markets to Cape Town (via air) and South Africa, Jan-Feb 2019/2023

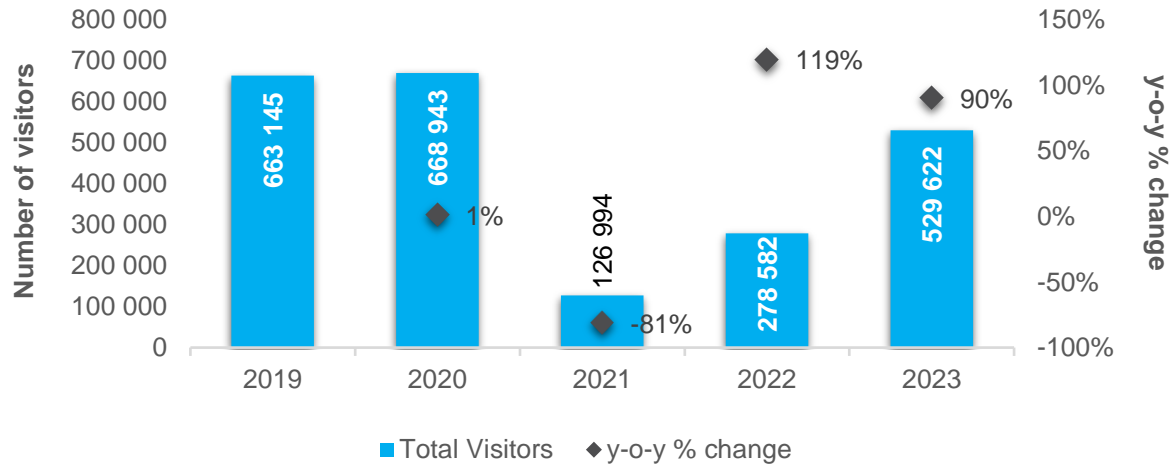


Source: StatsSA, 2023

# Western Cape Attractions

- Footfall to 21 participating attractions across the six regions of the Western Cape recorded a total of **529,622** visitors in February 2023, a **90% growth in the number of visitors** when compared to February 2022 and **80% of what it was in February 2019**.
- **The top 5 highest year-on-year growth** rates in February 2023 were recorded for Viljoensdrift River Cruise (697%), Cango Caves (175%), Robben Island (124%), Table Mountain National Park: Boulders (123%) and Table Mountain National Park: Cape of Good Hope (117%).

VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, FEB 2019 - 2023



Western Cape Attractions	Feb 2022/2023 % Change	Feb 2019/2023 % Recovery
<b>Cape Town</b>		
Table Mountain Aerial Cableway	84%	79%
Table Mountain National Park	94%	82%
Table Mountain National Park: Boulders	123%	86%
Table Mountain National Park: Cape of Good Hope	117%	84%
Robben Island	124%	60%
<b>Overberg</b>		
Agulhas National Park	-10%	63%
Bontebok National Park	11%	77%
Cape Agulhas Lighthouse	-11%	60%
De Hoop Nature Reserve	33%	161%
De Mond Nature Reserve	28%	106%
Harold Porter National Botanical Garden	6%	144%
Kogelberg Nature Reserve	2%	439%
Stony Point	18%	68%
Shipwreck Museum	-10%	36%
<b>Cango Caves</b>		
Cango Caves	175%	57%
<b>Weskus</b>		
West Coast National Park	-18%	49%
IKhwa ttu	66%	126%
<b>Winelands</b>		
Protea Tractor Trips	-37%	49%
Birds Paradise	-9%	49%
Viljoensdrift River Cruise	697%	88%
<b>Cape Karoo</b>		
Karoo National Park	-2%	93%

Sources: LTO's, and Attractions, 2023

# Visitor Trends Mobile Location Data Insights

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# Western Cape Mobile Location Data Insights

## What is mobile location data?

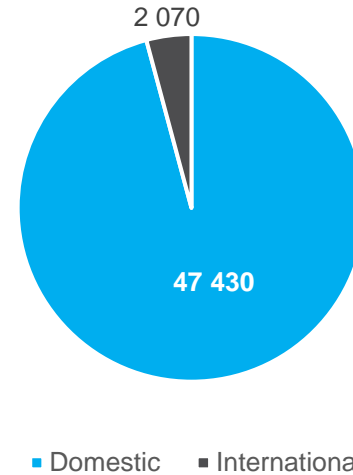
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they 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?

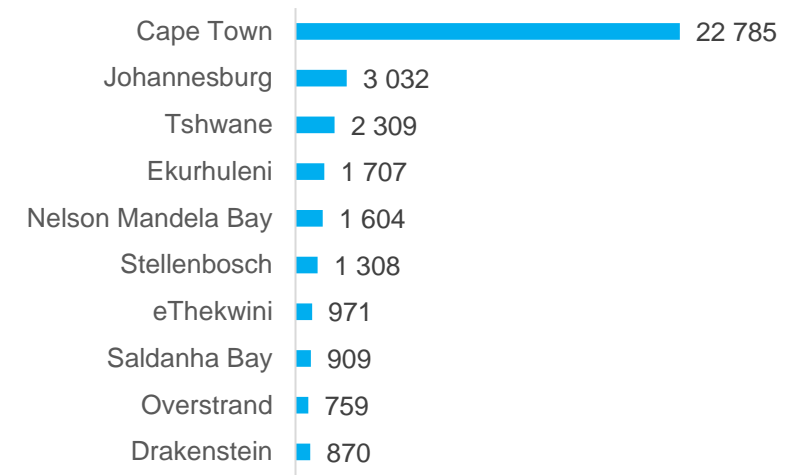
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, 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 **47,430 domestic** and **2,070 international** tourists who visited the Western Cape in February 2023. Within the domestic data set, **22,785** of the sampled tourists were from Cape Town and from the international sampled tourists, **479** were from the United States and **348** from the United Kingdom.

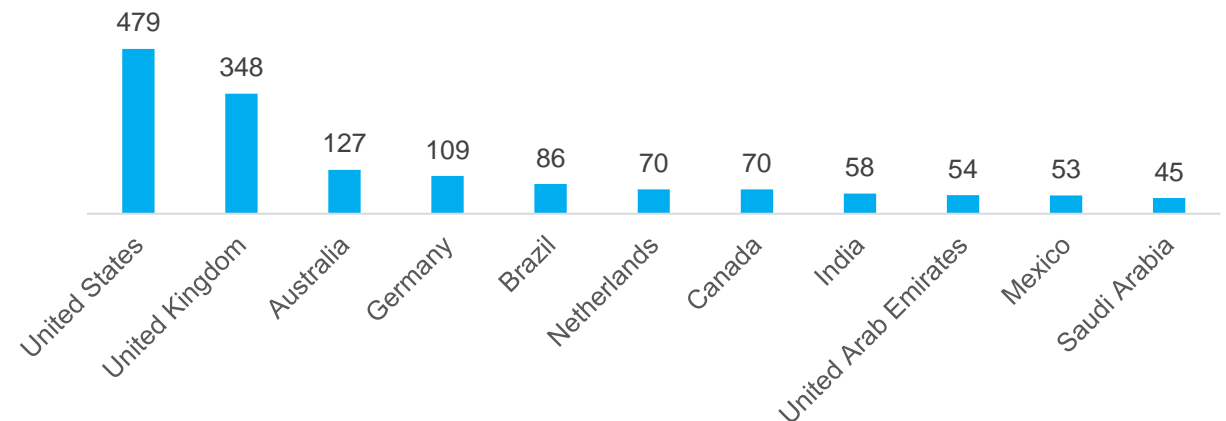
### Sample Size, Feb 2023



### Domestic Origin Municipality, Feb 2023



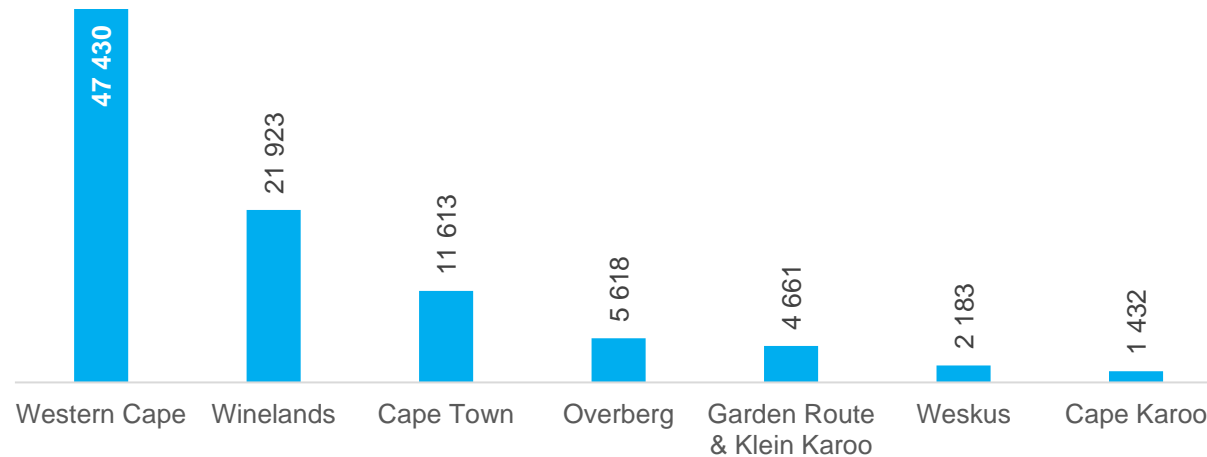
### International Origin Country, Feb 2023



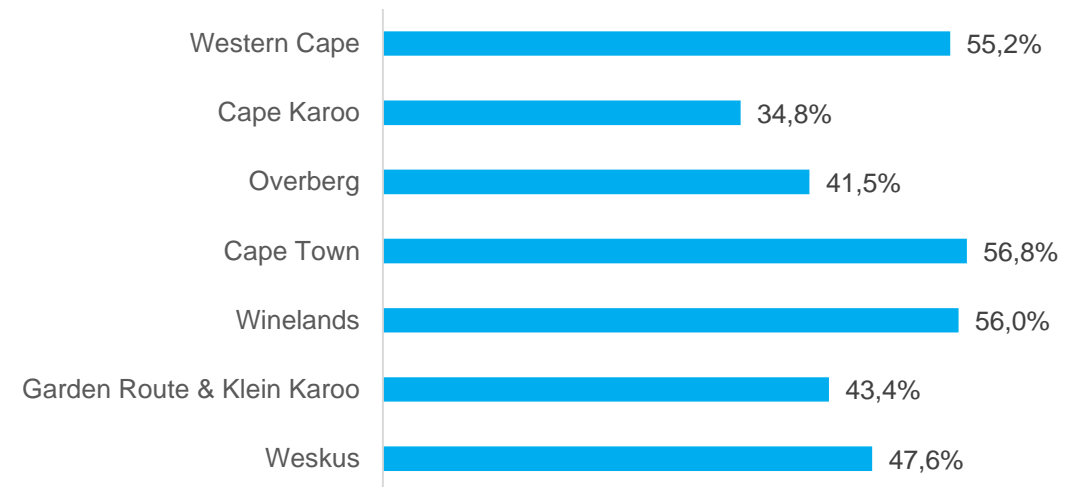
# Mobile Insights: Domestic Visitor Trends

- In February 2023, **Winelands (46,2%)** and **Cape Town (24,5%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (3,0%) had the least.
- **Cape Town (56,8%)** was the most popular region for domestic repeat visits, followed by **Winelands (56,0%)**.

Domestic Sample Size, Feb 2023

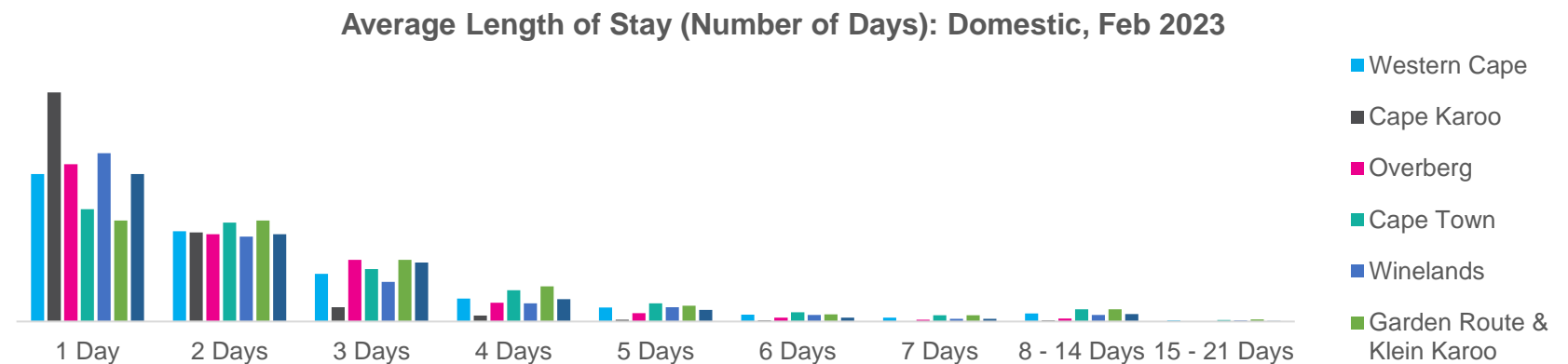
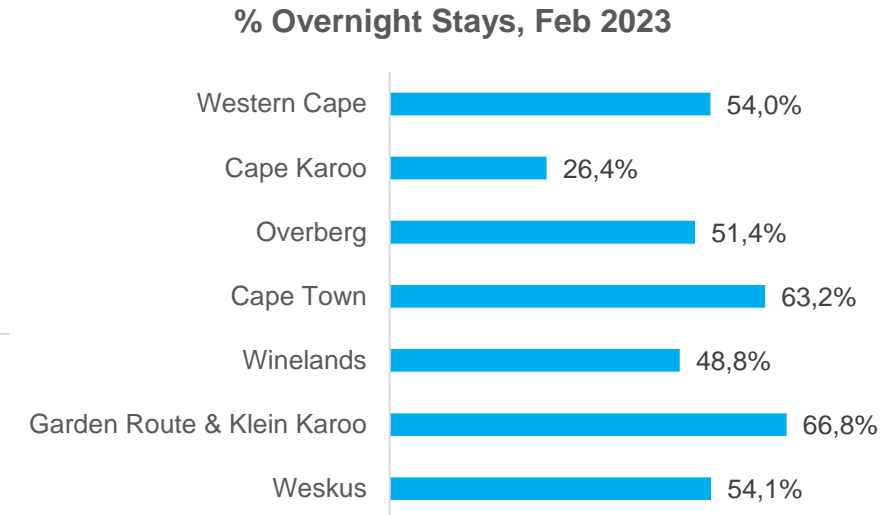
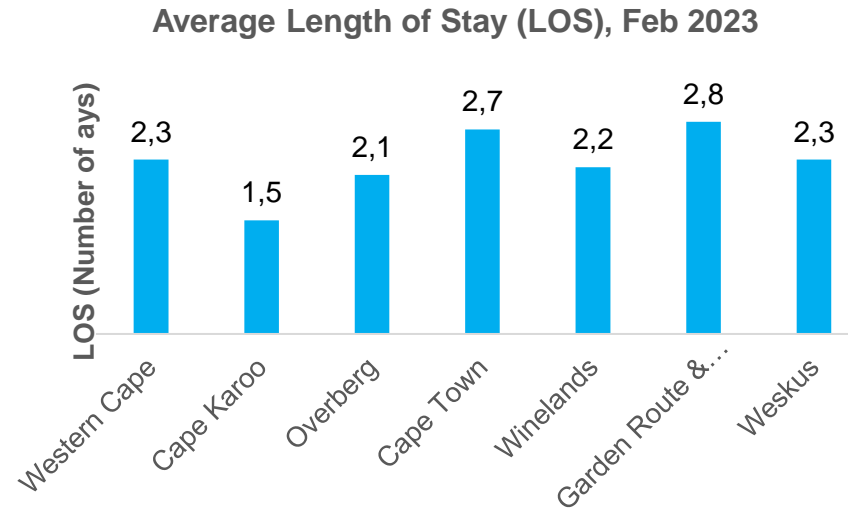


Domestic Repeat Visitors, Feb 2023



# Mobile Insights: Domestic Visitor Trends

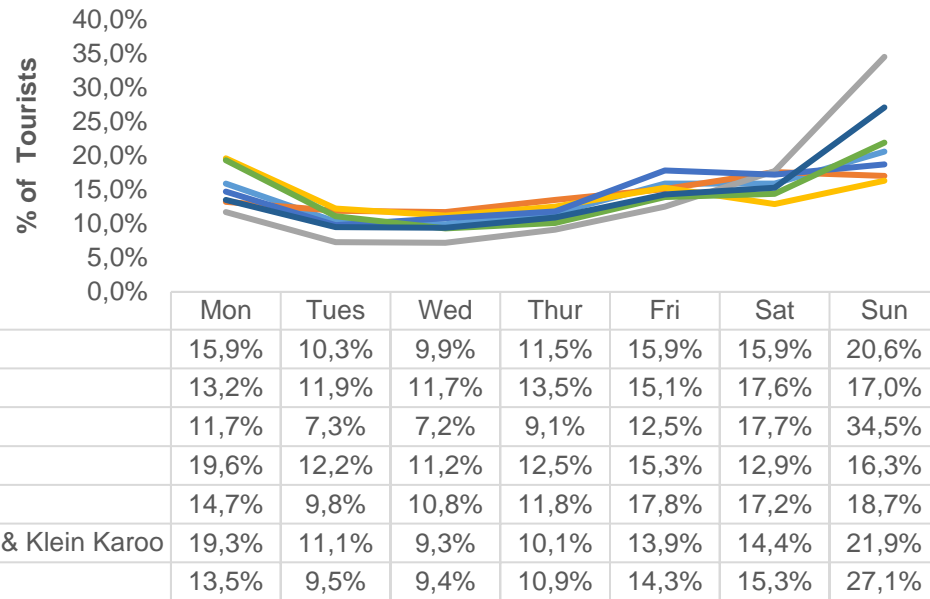
- On average, domestic tourists spent **the longest time in the Garden Route & Klein Karoo (2,8 days) and Cape Town (2,7 days)** during February 2023, and the shortest time in the Cape Karoo (1,5 days).
- Close to 70% of sampled tourists** stayed overnight in the Garden Route & Klein Karoo and just over 60% enjoyed overnight stays in Cape Town.
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.



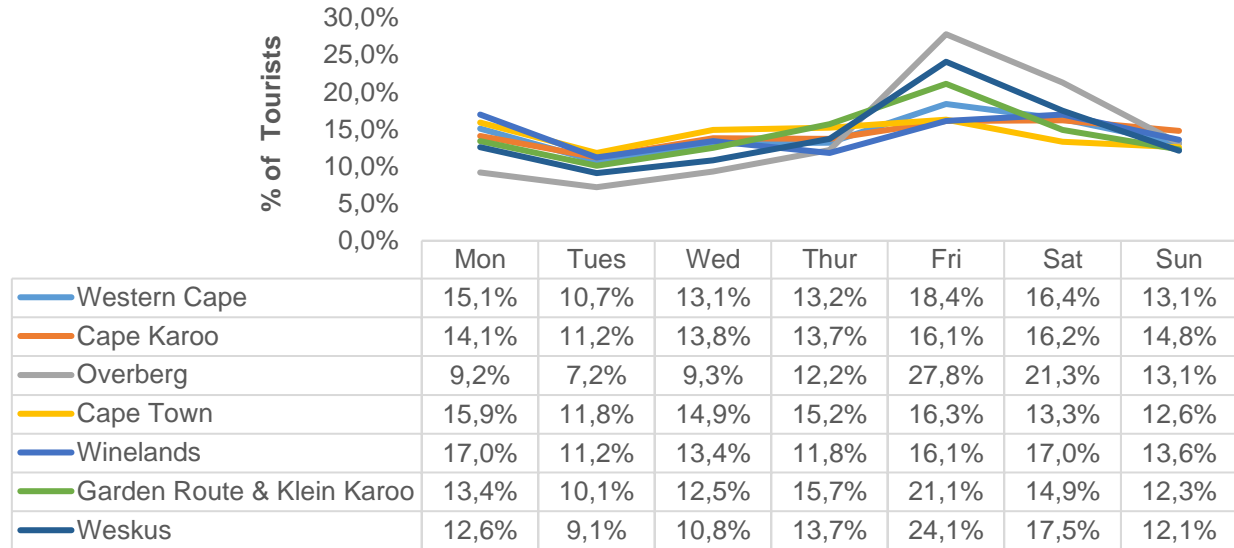
# Mobile Insights: Domestic Visitor Trends

- Domestic tourists to the province were most likely to arrive on a Friday and depart on a Sunday, pointing to the popularity in weekend stays.
- In the Winelands, a Monday or Saturday were the most popular arrival days and departure days were either on a Friday, Saturday or Sunday.
- Tourists to the Garden Route & Klein Karoo generally arrived on a Friday and departed on a Sunday or Monday.

**Popular Departure Days of the Week: Domestic, Feb 2023**



**Popular Arrival Days of the Week: Domestic, Feb 2023**

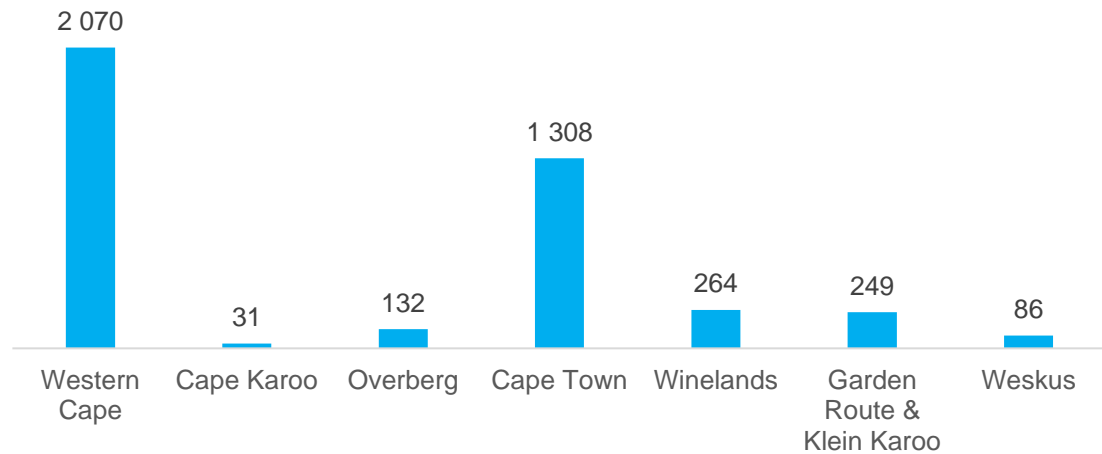


- In the Cape Karoo, which saw majority day visitors, a Friday or Saturday was the most popular arrival and departure days.
- Cape Town arrival day were most common on a Friday and departure was most popular on a Monday.
- Friday was the most popular arrival day in the Overberg and Sunday was its most common departure day.
- In the Weskus, Friday was the most popular arrival day and Sunday the most popular day for departure.

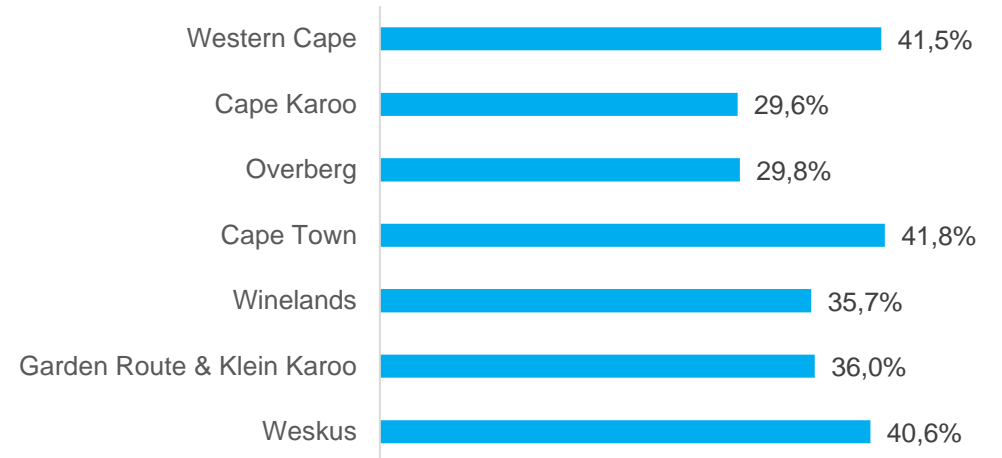
# Mobile Insights: International Visitor Trends

- **Nearly 65%** of the sampled international tourists visited Cape Town followed by 13% who visited the Winelands.
- Visitor trends for the Cape Karoo is based on a sample size of only 31 international tourists and therefore does not provide an accurate statistical representation for the region.
- Cape Town (41,8%) saw the most international repeat visitors in February 2023.

International Sample Size, Feb 2023



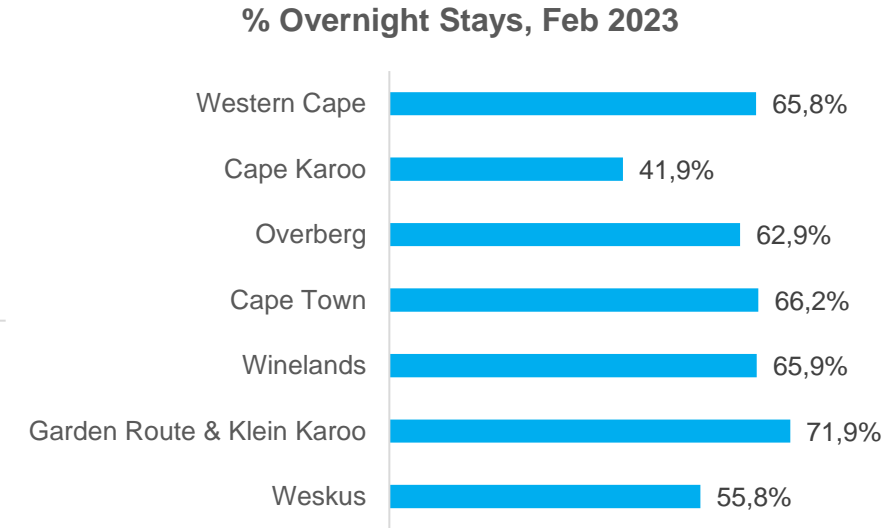
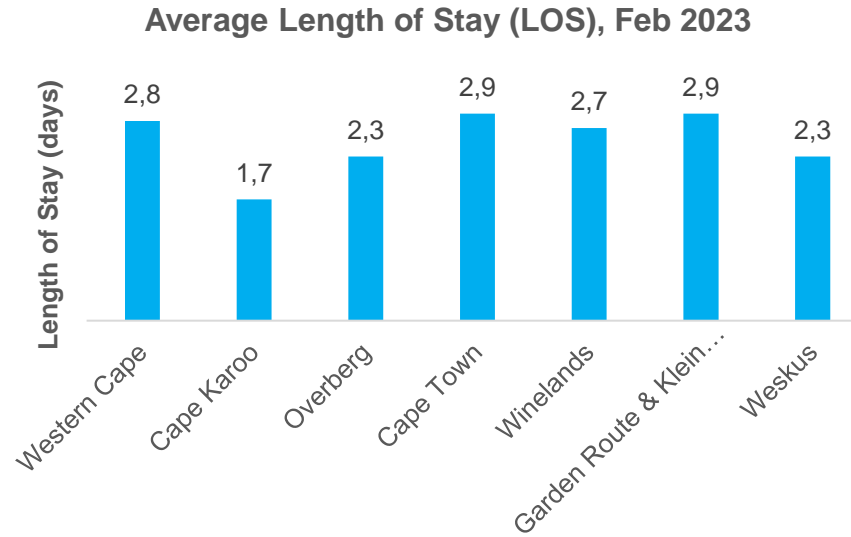
International Tourists Repeat Visits, Feb 2023



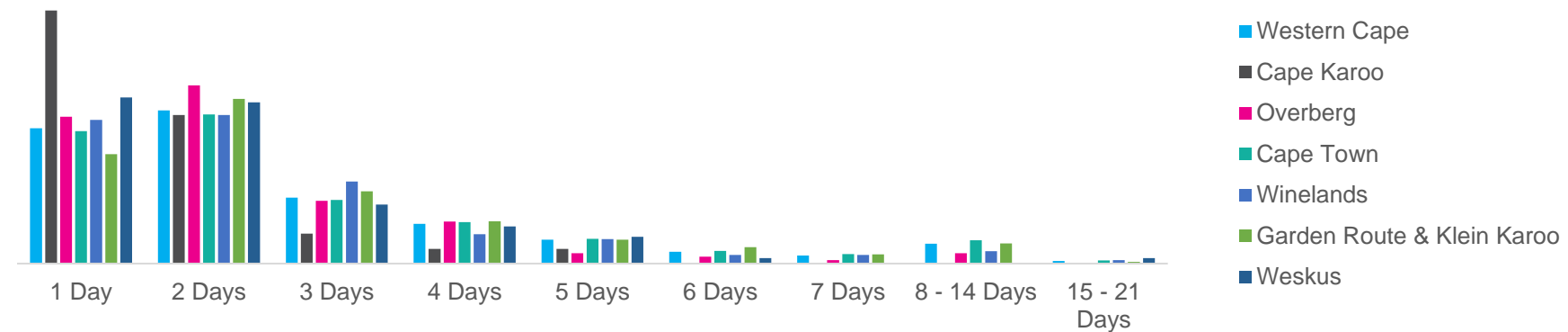


# Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Cape Town (2,9 days) and Garden Route & Klein Karoo (2,9 days).
- Over 70% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and close to 70% stayed overnight in Cape Town and the Winelands.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



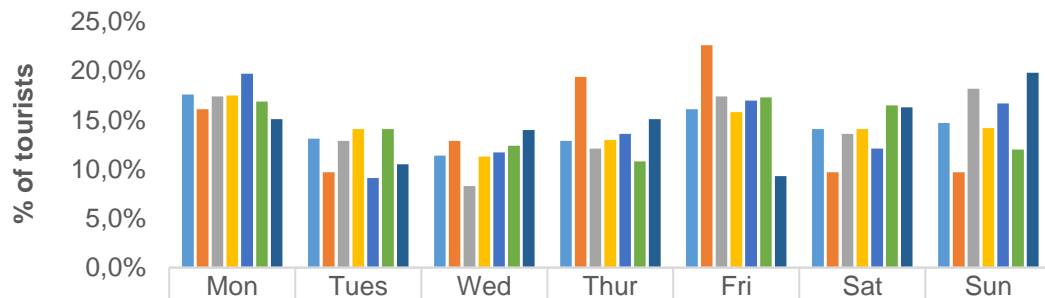
**Average Length of Stay (Number of Days): International, Feb 2023**



# Mobile Insights: International Visitor Trends

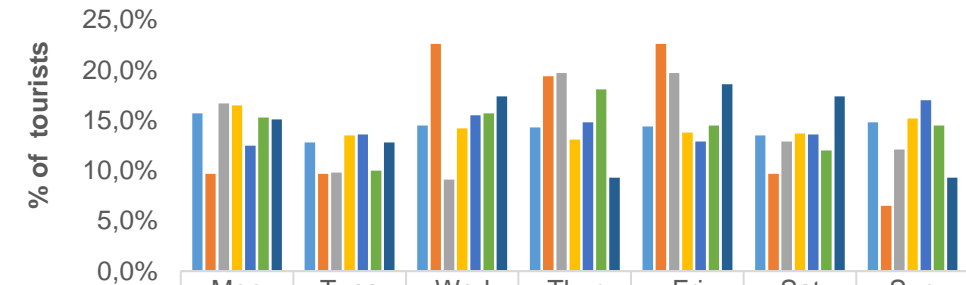
- During February 2023, international tourists to the province mainly arrived and departed on a Monday.
- In the Winelands, a Sunday was the most popular arrival day and Monday the most common day for departures.
- International tourists to the Garden Route & Klein Karoo arrived mostly on a Thursday and departed on a Friday.

Popular Departure Days of the Week: International, Feb 2023



Western Cape	17,6%	13,1%	11,4%	12,9%	16,1%	14,1%	14,7%
Cape Karoo	16,1%	9,7%	12,9%	19,4%	22,6%	9,7%	9,7%
Overberg	17,4%	12,9%	8,3%	12,1%	17,4%	13,6%	18,2%
Cape Town	17,5%	14,1%	11,3%	13,0%	15,8%	14,1%	14,2%
Winelands	19,7%	9,1%	11,7%	13,6%	17,0%	12,1%	16,7%
Garden Route & Klein Karoo	16,9%	14,1%	12,4%	10,8%	17,3%	16,5%	12,0%
Weskus	15,1%	10,5%	14,0%	15,1%	9,3%	16,3%	19,8%

Popular Arrival Days of the Week: International, Feb 2023

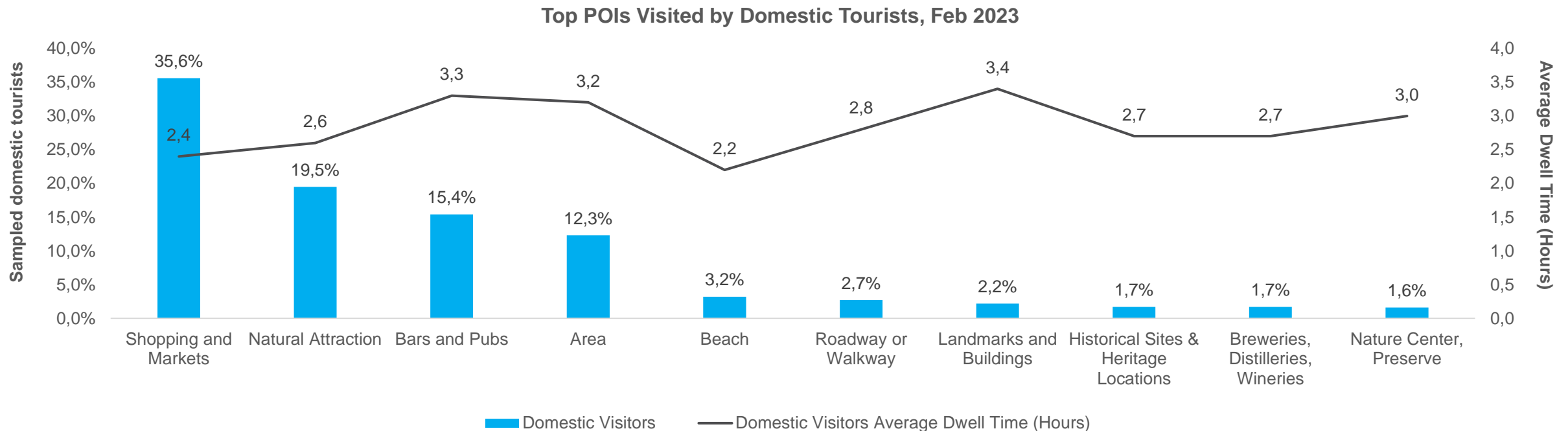


Western Cape	15,7%	12,8%	14,5%	14,3%	14,4%	13,5%	14,8%
Cape Karoo	9,7%	9,7%	22,6%	19,4%	22,6%	9,7%	6,5%
Overberg	16,7%	9,8%	9,1%	19,7%	19,7%	12,9%	12,1%
Cape Town	16,5%	13,5%	14,2%	13,1%	13,8%	13,7%	15,2%
Winelands	12,5%	13,6%	15,5%	14,8%	12,9%	13,6%	17,0%
Garden Route & Klein Karoo	15,3%	10,0%	15,7%	18,1%	14,5%	12,0%	14,5%
Weskus	15,1%	12,8%	17,4%	9,3%	18,6%	17,4%	9,3%

- The sampled tourists (31) in the Cape Karoo, arrived on a Wednesday or Friday and departed on a Friday.
- Cape Town arrival and departure day was most common on a Monday.
- Thursday or Friday was the most popular arrival days and departure day in the Overberg was mostly on a Sunday.
- In the Weskus, Friday was popular for arrival and departure was most common on a Sunday.

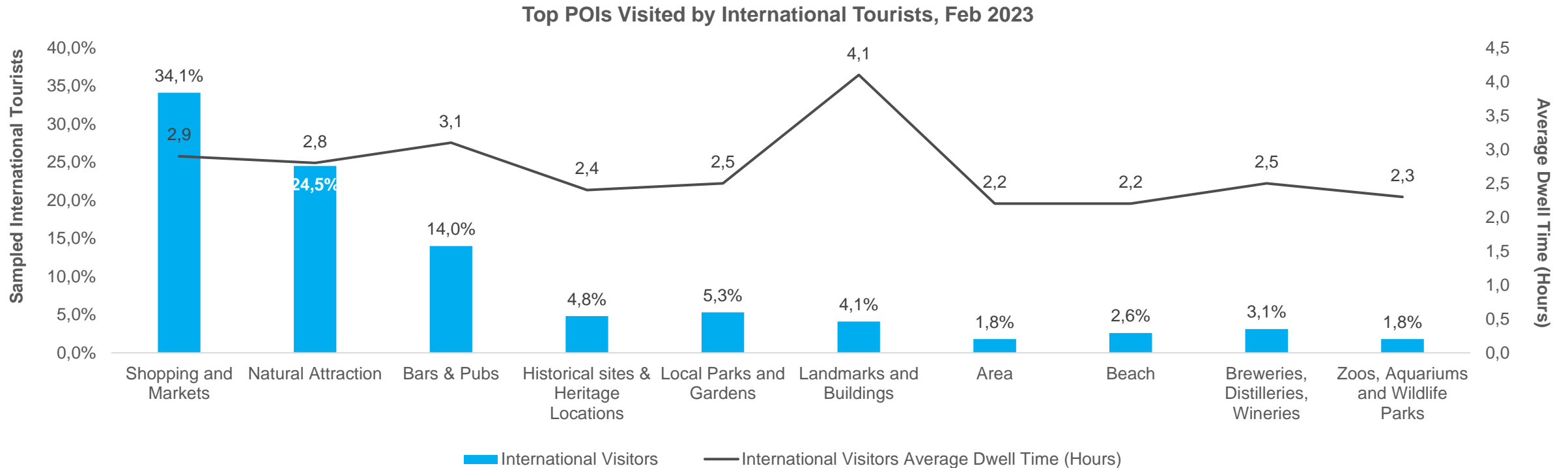
# Points of Interest (POIs) Visited: Domestic Tourists

- Shopping and markets was the most popular type of attraction visited by domestic tourists with an average dwell time of 2.4 hours.
- Natural attractions ranked as the second most popular point of interest among domestic tourists.
- 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.



# 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 2.9 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 3.1 hours at the location.
- Among the top 10 POIs visited, international tourists spent the longest time at landmarks & buildings (4.1 hours).



# 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

<b>Primary Study Geography</b>	<b>Tourists are defined as:</b>
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.
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Residents of the Western Cape are not counted as a tourists</li> <li>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.</li> </ul>	
<b>Secondary Study Geography</b>	<b>Tourists are defined as:</b>
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.
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Residents of a city are not counted as a tourist of the city</li> <li>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</li> </ul>	
<b>Point of Interest Study Geography</b>	<b>Tourists are defined as:</b>
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
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Any 90 day period refers to any consecutive 90 days in their mobile location data history</li> <li>Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.).</li> <li>Filter out people who work at the Tourism Experience.</li> </ul>	
<b>What are Tourist Segments?</b>	
<ul style="list-style-type: none"> <li><b>Local Tourists:</b> Tourists who reside within the same Region.</li> <li><b>Domestic Tourists:</b> Tourists who reside in South Africa outside of Western Cape</li> <li><b>International Tourists:</b> Tourists who reside outside of South Africa</li> </ul>	

# 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.



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