



Tourism Research Overview

March 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

The first quarter of 2023 sustained a positive trajectory with recovery remaining at a stable rate. Key highlights of the overall tourism performance in March 2023 are outlined below.

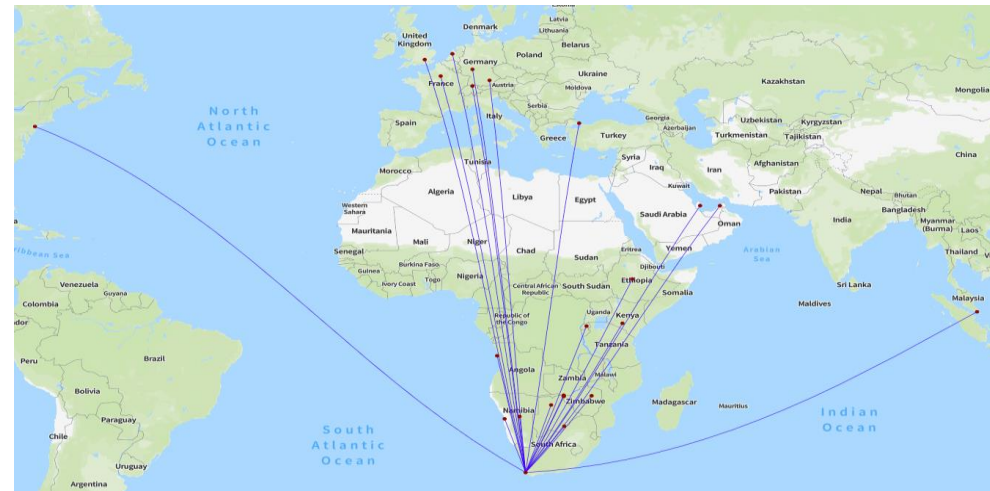
- International two-way passengers through CTIA reached 272,955 in March 2023; and **fully recovered against March 2019, reaching 103%**.
- 577,855 domestic two-way passengers passed through Cape Town International Airport (CTIA) during March 2023; registering a **75% recovery vs. March 2019**.
- George Airport recorded 63,399 two-way passengers in March 2023 **and recovered by 96%** when compared to passenger movement in March 2019.
- In the month of March 2023, Cape Town recorded a total of **89,867 tourist arrivals via air**, of which **91% originated from overseas markets** and **9% from the African continent** (StatsSA data).
- **United Kingdom led as the top source market to Cape Town (via air)** between January and March 2023 (cumulatively), closely followed by Germany, USA, Netherlands and France in the top 5 positions. The European market led as Cape Town's largest contributor to tourist arrivals, with 8 out of the top 10 source markets originating from the continent in Q1 2023.
- The cumulative total of tourist arrivals between January and March 2023 reflected **full recovery from 6 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan-Mar). These markets included UK (106%), Germany (107%), USA (151%), Netherlands (117%), Canada (105%) and Belgium (107%). In addition, Italy nearly fully recovered over the same period, reaching 98% when compared to same period in 2019.
- Footfall to 28 participating attractions across the six regions of the Western Cape recorded a total of **585,287 visitors in March 2023**, a **48% year-on-year growth in the number of visitors when compared to March 2022** and **79% of what it was in March 2019**.
- The top 5 highest year-on-year growth rates in March 2023 were recorded for **Robben Island (95%)**, **Table Mountain National Park: Boulders (77%)**, **Table Mountain National Park: Cape of Good Hope (76%)**, **Shipwreck Museum (56%)** and **Cango Caves (53%)**.

Full recovery for international two-way passengers in March 2023

- International passenger movement remained strong into the first quarter of 2023, reaching **full recovery in January (101%), February (107%), and continued into March (103%)** when compared to 2019.

Year/Month	2019	2020	2021	2022	2023 ytd	2023		
						Jan	Feb	Mar
Two-way passengers	2 606 398	810 811	525 441	1 895 975	812 355	280 430	258 970	272 955
Passenger recovery*	100%	31%	20%	73%	2019 104% 2020 113%	2019 101% 2020 97%	2019 107% 2020 100%	2019 103% 2020 162%

Operating carriers

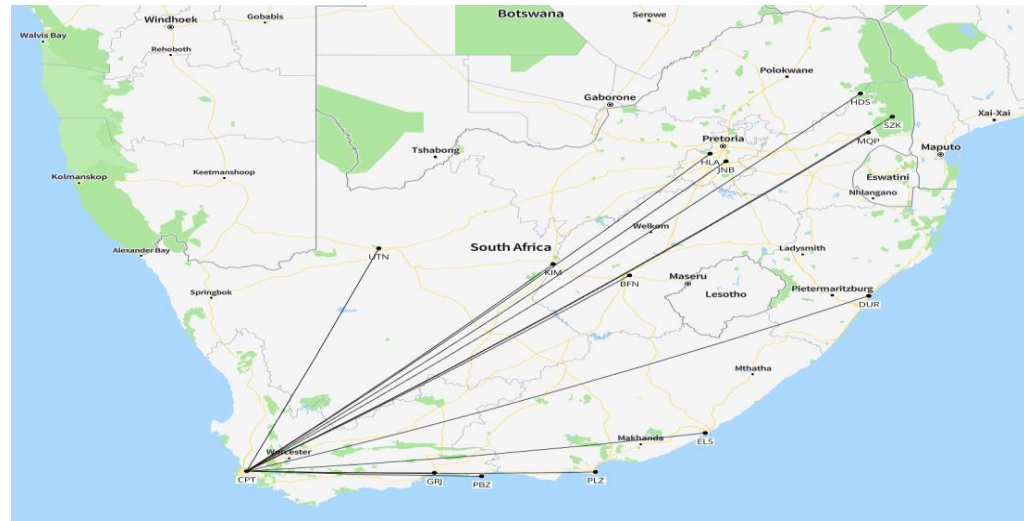


Domestic passengers at 75% recovery in March 2023

- Domestic two-way passengers remained at a steady rate of **close to 80% recovery between January and March 2023.**

Year/Month	2019	2020	2021	2022	2023 ytd	2023		
						Jan	Feb	Mar
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	1 600 659	515 017	507 787	577 855
Passenger recovery*	100%	38%	50%	71%	2019 77% 2020 87%	2019 79% 2020 74%	2019 78% 2020 72%	2019 75% 2020 127%

Operating carriers



George Airport nearly at full recovery in March 2023

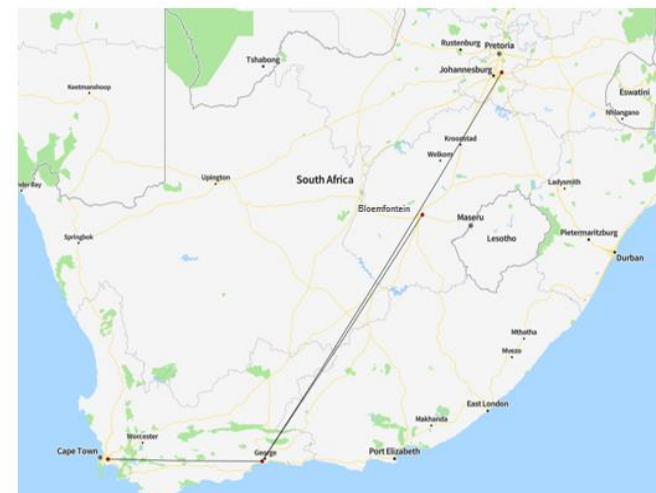
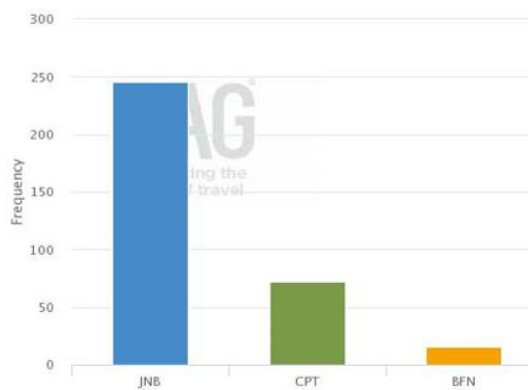
- George Airport two-way passengers reached **63,399** in March 2023; **96% recovery vs. March 2019**.

Year/Month	2019	2020	2021	2022	2023 ytd	2023		
						Jan	Feb	Mar
Two-way passengers	832 981	340 438	536 886	740 990	192 165	63 367	59 184	63 399
Passenger recovery*	100%	41%	64%	89%	2019 95% 2020 101%	2019 94% 2020 84%	2019 96% 2020 88%	2019 96% 2020 145%

Operating carriers







Inbound frequency by origin for Feb 2023



CPT International Route & Airline Update: 6 April 2023

21 Airlines and 26 Destinations



Rest of Africa

-  • **Air Botswana**, Gaborone (GBE), three times per week
-  • **Ethiopian Airlines**, Addis Ababa (ADD), 11 flights a week
-  • **FlyNamibia**, 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 times per week
-  • **TAAG**, Luanda (LAD), seven times per week
-  • **RwandAir**, Kigali (KGL) - Harare (HRE), six times per week
-  • **Airlink**, Windhoek (WDH), three times a day
Walvis Bay (WVB), daily
Harare (HRE), daily
Victoria Falls (VFA), six times per week
Maun (MUB), daily
Maputo (MPM), four times per week
-  • **Air Mauritius**, Mauritius (MRU), twice per week
-  • **Eswatini Air**, Sikhuphe (SHO), 3 times per week starting 2 June




Europe

-  • **Lufthansa**, Frankfurt (FRA), six times per week
-  • **British Airways**, London Heathrow (LHR), daily service
-  • **KLM**, Amsterdam (AMS), daily
-  • **Turkish Airlines**, Istanbul (IST), Daily flight. 5 times per week from 6 May
-  • **Air Belgium**, Belgium (BRU), BRU-JNB-CPT-JNB-BRU, twice per week
-  • **Edelweiss**, Zurich (ZRH), three times a week until end April
-  • **Condor**, Frankfurt (FRA), three times a week until end April

North America

-  • **United Airlines**, Newark (EWR), three times per week
Washington D.C (IAD), three times per week
-  • **Delta Air Lines**, Atlanta (ATL), three times a week

Asia and Middle East

-  • **Emirates**, Dubai (DXB), double daily
-  • **Qatar Airways**, Doha (DOH), 10 flights per week
-  • **Singapore Airlines**, Singapore (SIN), SIN-JNB-CPT-JNB-SIN, daily service

Performance of Air Arrivals to Cape Town: March 2023

- In the month of **March 2023**, Cape Town recorded a total of **89,867** tourist arrivals via air, of which 91% originated from overseas markets and 9% from the African continent.

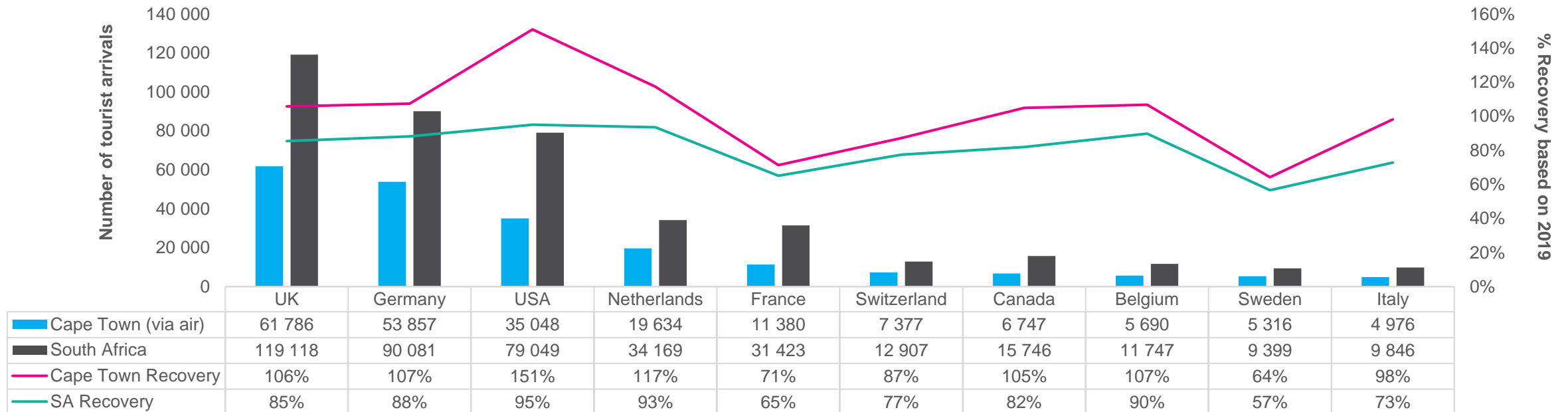
TOURIST ARRIVALS TO SOUTH AFRICA BY AIRPORT, MARCH 2023			
Source Market	Cape Town	OR Tambo	King Shaka
Overseas Tourist Arrivals	81,607	89,335	2,699
Africa Tourist Arrivals	8,167	38,238	275
Total Tourist Arrivals	89,867	128,307	2,975
Overseas % Share of Total Tourists	91%	70%	91%

Source: StatsSA, 2023

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

- **United Kingdom led as the top source market to Cape Town (via air)** between January and March 2023, closely followed by Germany, USA, Netherlands and France in the top 5 positions. The European market continues an upward trajectory, **with 8 out of the top 10 source markets to Cape Town originating from the continent**.
- The cumulative total of tourist arrivals between January and March 2023 reflected full recovery from **6 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan-Mar). These markets included UK (106%), Germany (107%), USA (151%), Netherlands (117%), Canada (105%) and Belgium (107%). In addition, Italy nearly fully recovered over the same period, reaching 98% when compared to same period in 2019.

Recovery in Top 10 Source Markets to Cape Town (via air), Jan-Mar 2019/2023

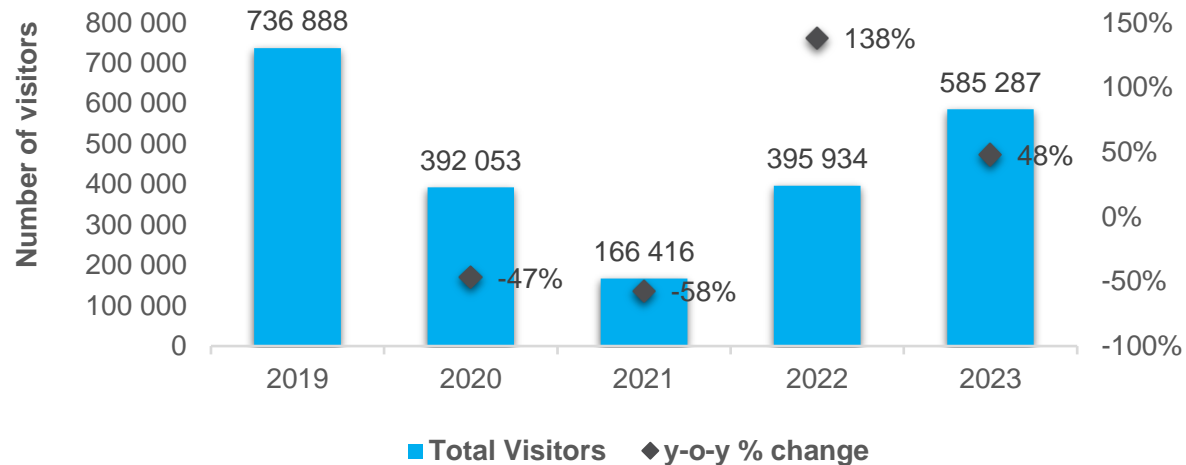


Source: StatsSA, 2023

Western Cape Attractions

- Footfall to 28 participating attractions across the six regions of the Western Cape recorded a total of **585,287** visitors in March 2023, a **48% growth in the number of visitors** when compared to March 2022 and **79% of what it was in March 2019**.
- **The top 5 highest year-on-year growth** rates in March 2023 were recorded for Robben Island (95%), Table Mountain National Park: Boulders (77%), Table Mountain National Park: Cape of Good Hope (76%), Shipwreck Museum (56%) and Cango Caves (53%).

VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, MARCH 2019 - 2023



Western Cape Attractions	Mar 2022/2023 % Change	Mar 2019/2023 % Recovery
Cape Town		
Table Mountain Aerial Cableway	45%	85%
Table Mountain National Park	52%	80%
Table Mountain National Park: Boulders	77%	84%
Table Mountain National Park: Cape of Good Hope	76%	79%
Robben Island	95%	76%
Overberg		
Agulhas National Park	-41%	53%
Bontebok National Park	11%	79%
Cape Agulhas Lighthouse	-45%	50%
De Hoop Nature Reserve	40%	165%
De Mond Nature Reserve	26%	48%
Harold Porter National Botanical Garden	-16%	100%
Kogelberg Nature Reserve	-6%	215%
Stony Point	41%	99%
Shipwreck Museum	56%	23%
Arniston Hotel & Spa	2%	No data available for 2019
Elim Heritage Centre	-68%	No data available for 2019
Panthera Africa	25%	53%
Garden Route & Klein Karoo		
Cango Caves	53%	59%
Tsitsikamma National Park	47%	73%
Wilderness National Park	-10%	74%
Knysna National Park	-22%	87%
Weskus		
West Coast National Park	-31%	43%
!Khwa ttu	14%	95%
Winelands		
Avalon Springs	-49%	49%
Protea Tractor Trips	-1%	141%
Birds Paradise	8%	95%
Viljoensdrift River Cruise	-11%	85%
Cape Karoo		
Karoo National Park	-9%	79%

Visitor Trends Mobile Location Data Insights

Western Cape Mobile Location Data Insights

What is mobile location data?

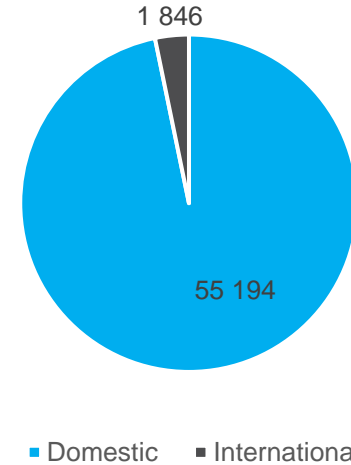
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

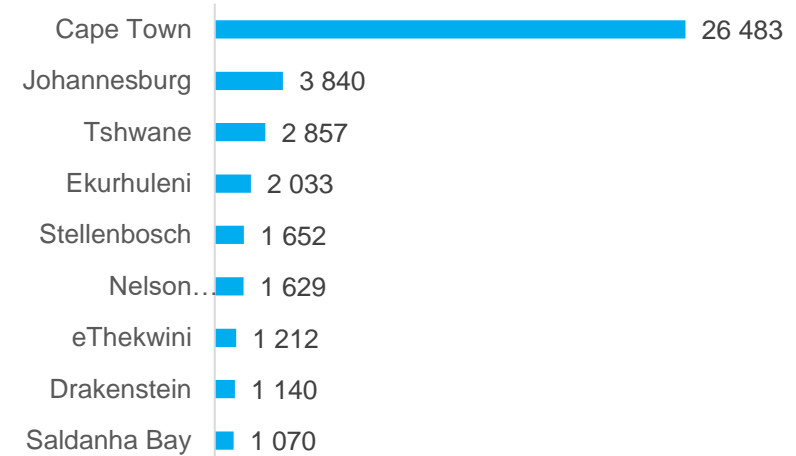
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, 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 represent mobile location data from a sample of **55,194 domestic** and **1,846 international** tourists who visited the Western Cape in March 2023. Within the domestic data set, **26,483** of the sampled tourists were from Cape Town and from the international sampled tourists, **382** were from the United States and **340** from the United Kingdom.

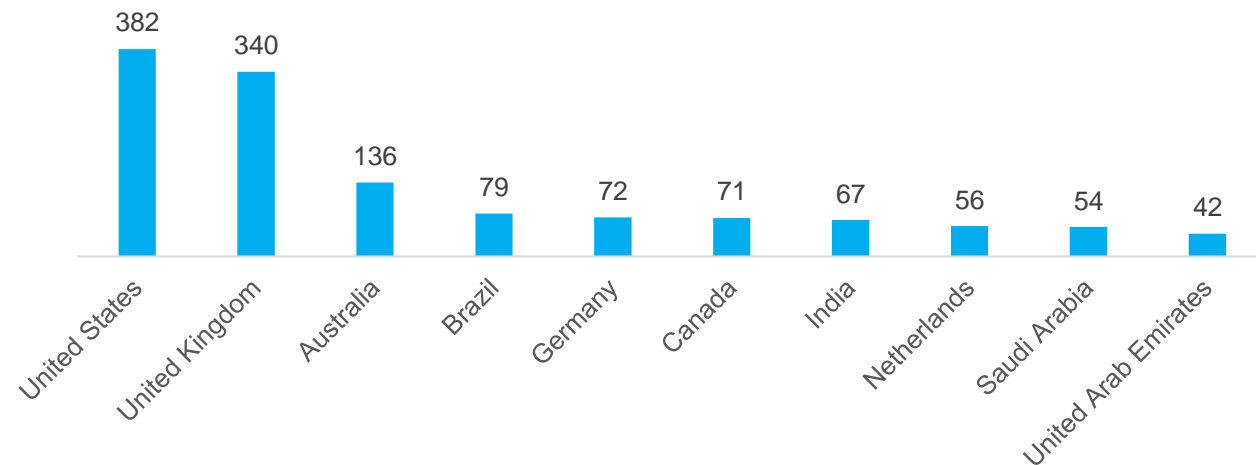
Sample Size, Mar 2023



Domestic Origin Municipality, Mar 2023



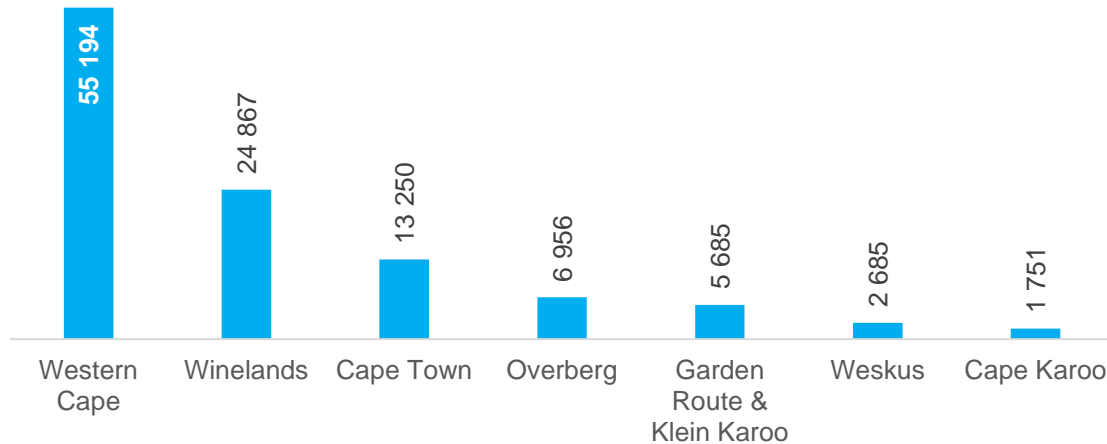
International Origin Country, Mar 2023



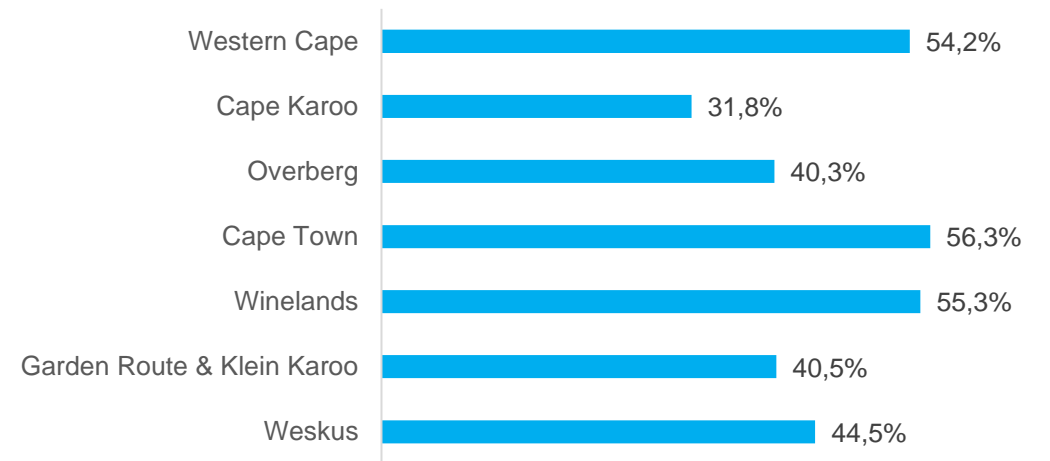
Mobile Insights: Domestic Visitor Trends

- In March 2023, **Winelands (45,1%)** and **Cape Town (24,0%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (3,2%) the least.
- **Cape Town (56,3%)** was the most popular region for domestic repeat visits, followed by **Winelands (55,3%)**.

Domestic Sample Size, Mar 2023



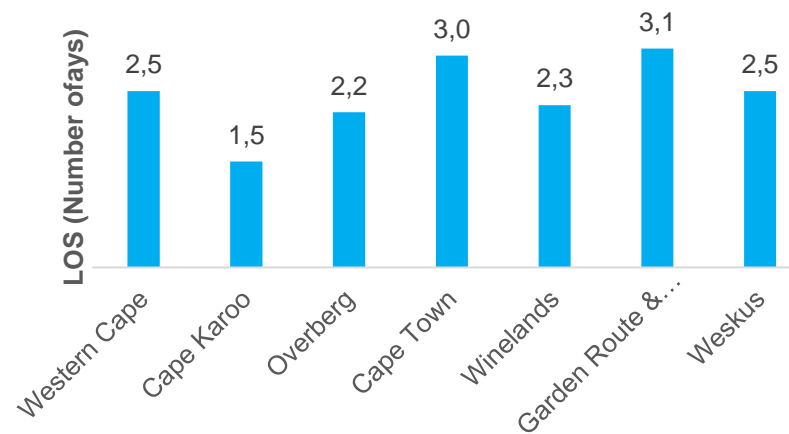
Domestic Repeat Visitors, Mar 2023



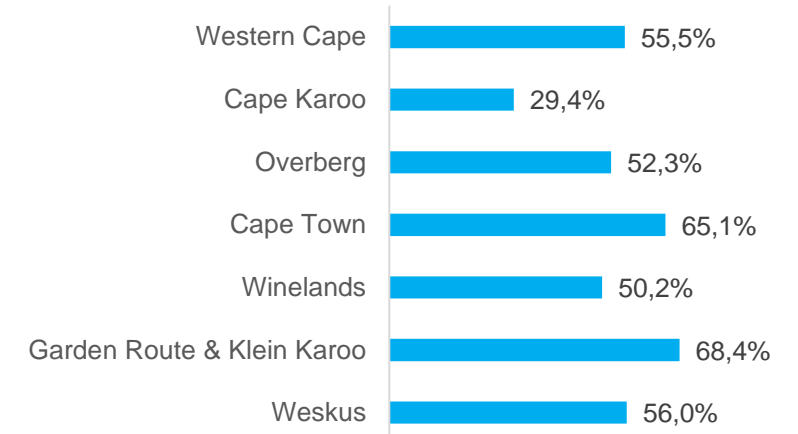
Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent the longest time in the **Garden Route & Klein Karoo (3,1 days)** and **Cape Town (3,0 days)** during March 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 65% enjoyed overnight stays in Cape Town.
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.

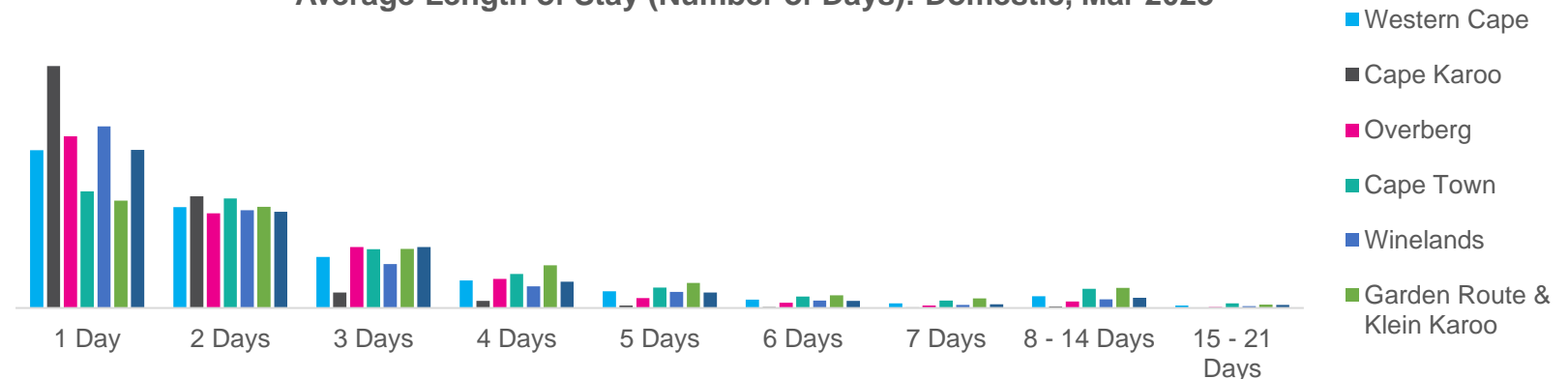
Average Length of Stay (LOS), Mar 2023



% Overnight Stays, Mar 2023



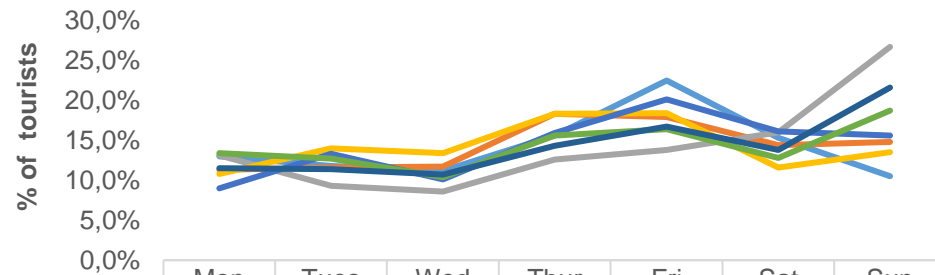
Average Length of Stay (Number of Days): Domestic, Mar 2023



Mobile Insights: Domestic Visitor Trends

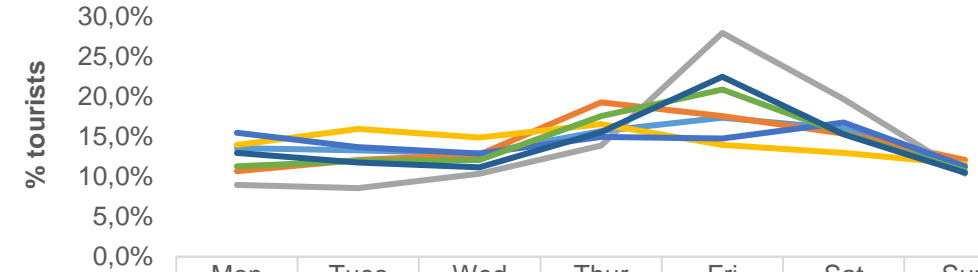
- Domestic tourists to the province were most likely to both arrive and depart on a Friday.
- In the Winelands, Saturday was the most popular arrival day and departure was most common on a Friday.
- Tourists to the Garden Route & Klein Karoo generally arrived on a Friday and departed on a Sunday.

Popular Departure Days of the Week: Domestic, Mar 2023



	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	13,0%	11,8%	11,2%	15,6%	22,5%	15,3%	10,5%
Cape Karoo	11,3%	11,6%	11,7%	18,3%	17,9%	14,4%	14,8%
Overberg	13,1%	9,3%	8,6%	12,6%	13,8%	16,0%	26,7%
Cape Town	10,8%	14,0%	13,4%	18,3%	18,4%	11,6%	13,5%
Winelands	9,0%	13,3%	10,1%	15,9%	20,1%	16,1%	15,6%
Garden Route & Klein Karoo	13,4%	12,7%	10,4%	15,6%	16,4%	12,8%	18,7%
Weskus	11,5%	11,4%	10,7%	14,3%	16,7%	13,8%	21,6%

Popular Arrival Days of the Week: Domestic, Mar 2023



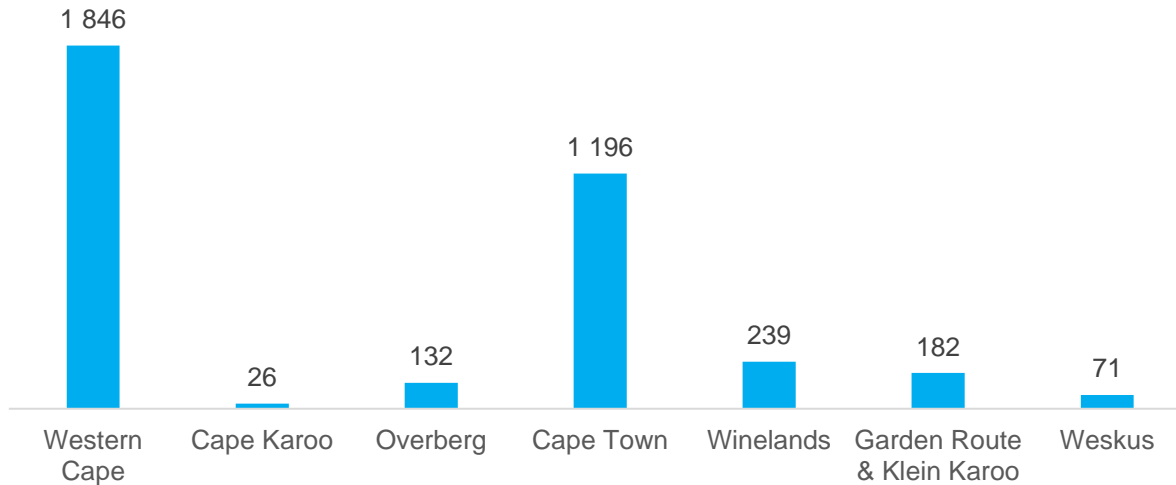
	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	13,6%	13,3%	12,9%	15,7%	17,4%	16,0%	11,2%
Cape Karoo	10,7%	12,1%	12,8%	19,3%	17,6%	15,4%	12,1%
Overberg	9,0%	8,6%	10,4%	13,9%	28,0%	19,7%	10,4%
Cape Town	14,0%	16,0%	14,9%	16,6%	14,0%	13,0%	11,6%
Winelands	15,5%	13,7%	12,9%	15,0%	14,8%	16,8%	11,3%
Garden Route & Klein Karoo	11,3%	12,0%	12,1%	17,6%	20,9%	15,4%	10,7%
Weskus	13,0%	11,8%	11,2%	15,6%	22,5%	15,3%	10,5%

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

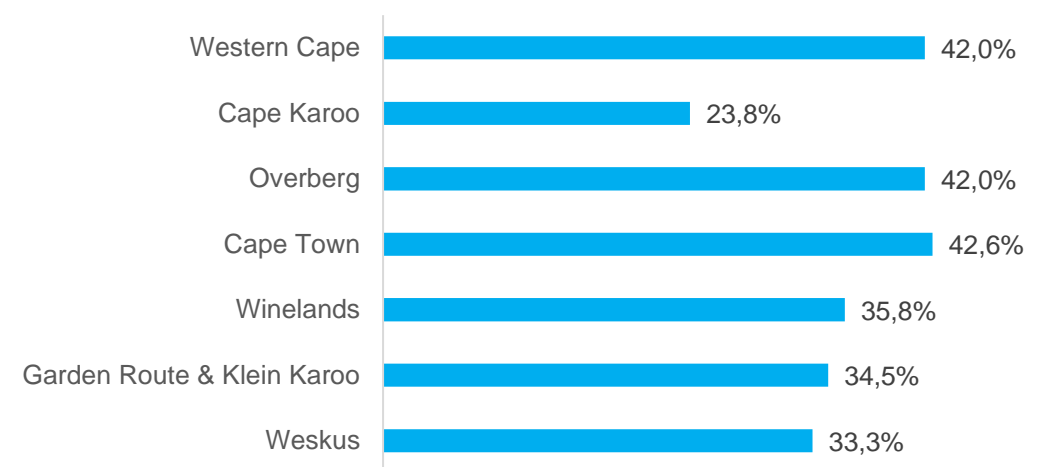
Mobile Insights: International Visitor Trends

- **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 26 international tourists and therefore does not provide an accurate statistical representation for the region.
- Cape Town (42,6%) and Overberg (42,0%) saw the most international repeat visitors in March 2023.

International Sample Size, Mar 2023



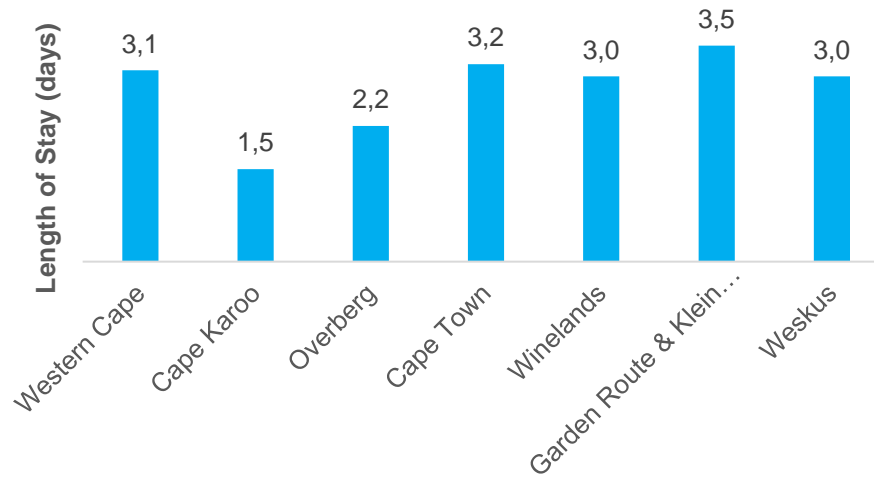
International Tourists Repeat Visits, Mar 2023



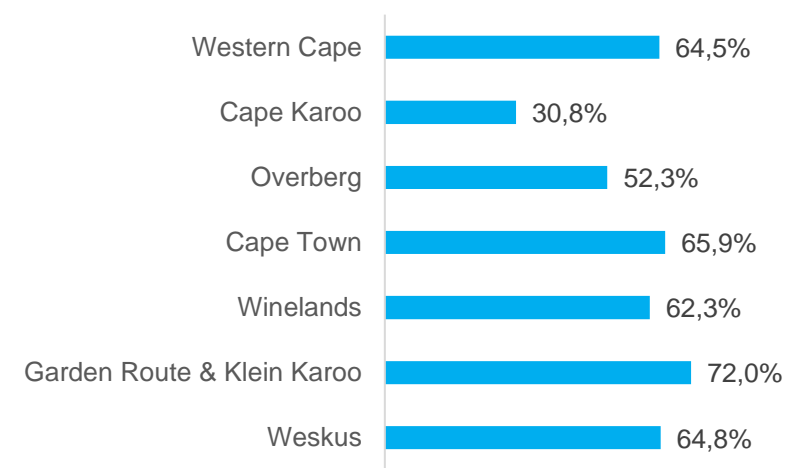
Mobile Insights: International Visitor Trends

- International tourists spent the longest time in the Garden Route & Klein Karoo (3,5 days) and Cape Town (3,2 days).
- Over 70% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and over 65% stayed overnight in Cape Town.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

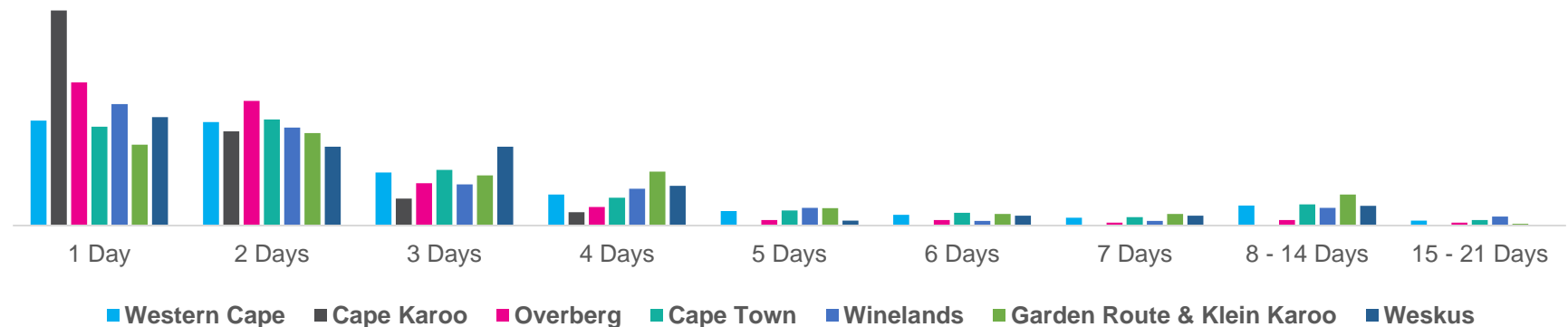
Average Length of Stay (LOS), Mar 2023



% Overnight Stays, Mar 2023



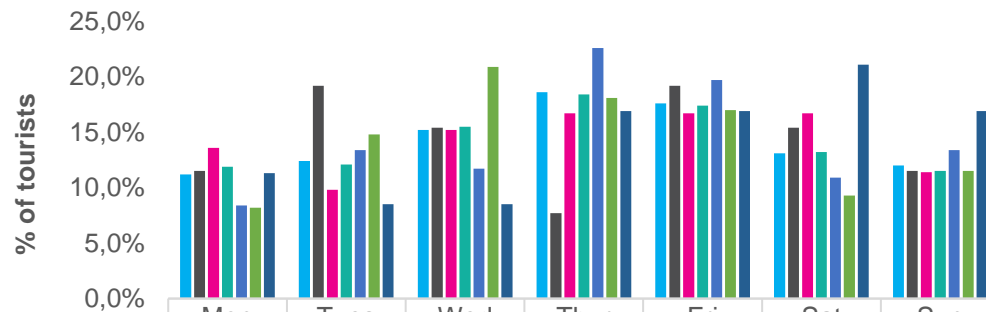
Average Length of Stay (Number of Days): International, Mar 2023



Mobile Insights: International Visitor Trends

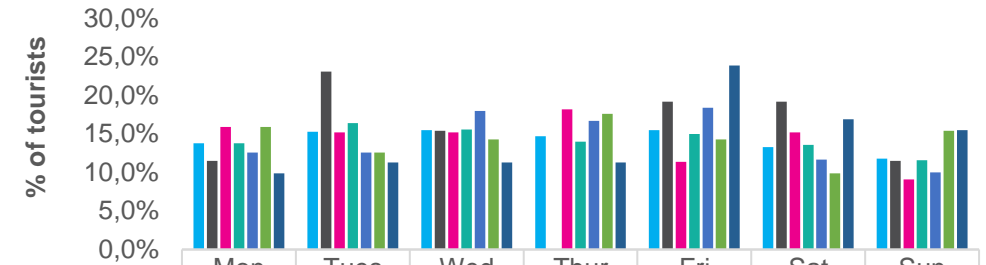
- During March 2023, international tourists to the province mainly arrived on a Wednesday or Friday, while departures were mostly on a Thursday or Friday.
- In the Winelands, a Wednesday or Friday was the most popular arrival days and Thursdays were most common for departures.
- International tourists to the Garden Route & Klein Karoo arrived mostly on a Thursday and departed on a Wednesday.

Popular Departure Days of the Week: International, Mar 2023



Western Cape	11,2%	12,4%	15,2%	18,6%	17,6%	13,1%	12,0%
Cape Karoo	11,5%	19,2%	15,4%	7,7%	19,2%	15,4%	11,5%
Overberg	13,6%	9,8%	15,2%	16,7%	16,7%	16,7%	11,4%
Cape Town	11,9%	12,1%	15,5%	18,4%	17,4%	13,2%	11,5%
Winelands	8,4%	13,4%	11,7%	22,6%	19,7%	10,9%	13,4%
Garden Route & Klein Karoo	8,2%	14,8%	20,9%	18,1%	17,0%	9,3%	11,5%
Weskus	11,3%	8,5%	8,5%	16,9%	16,9%	21,1%	16,9%

Popular Arrival Days of the Week: International, Mar 2023



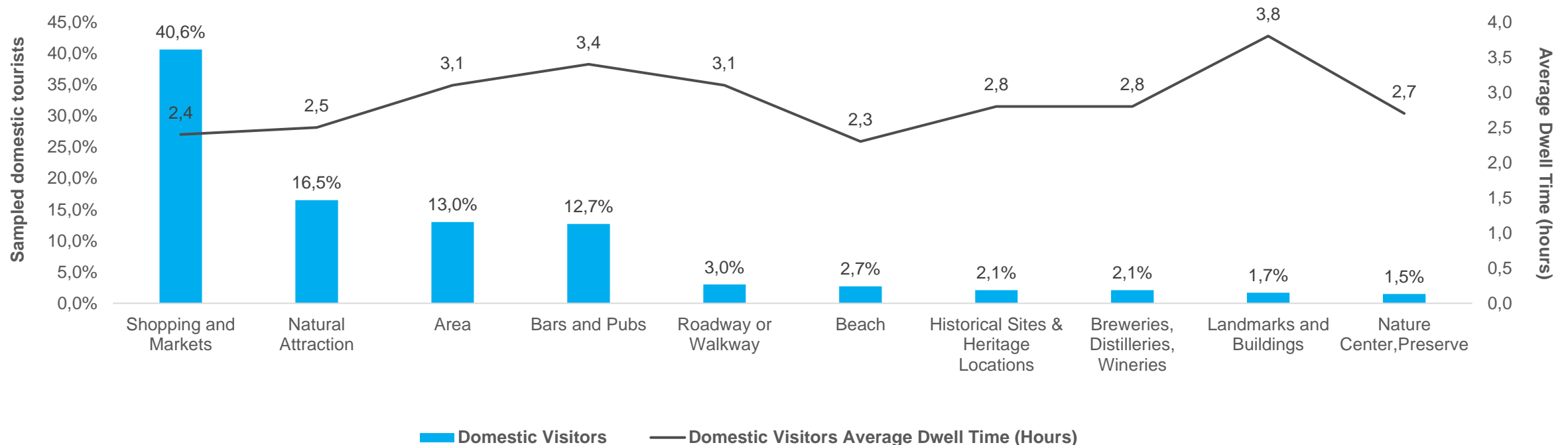
Western Cape	13,8%	15,3%	15,5%	14,7%	15,5%	13,3%	11,8%
Cape Karoo	11,5%	23,1%	15,4%	0,0%	19,2%	19,2%	11,5%
Overberg	15,9%	15,2%	15,2%	18,2%	11,4%	15,2%	9,1%
Cape Town	13,8%	16,4%	15,6%	14,0%	15,0%	13,6%	11,6%
Winelands	12,6%	12,6%	18,0%	16,7%	18,4%	11,7%	10,0%
Garden Route & Klein Karoo	15,9%	12,6%	14,3%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

- The sampled tourists (26) in the Cape Karoo, arrived on a Tuesday and departed on either a Tuesday or Friday.
- Cape Town arrival day was most common on a Tuesday and departures were on a Thursday.
- Thursday was the most popular arrival day and departure day in the Overberg was mostly on a Thursday, Friday or Saturday.
- In the Weskus, Friday was popular for arrival and departure was most common on a Saturday.

Points of Interest (POIs) Visited: Domestic Tourists

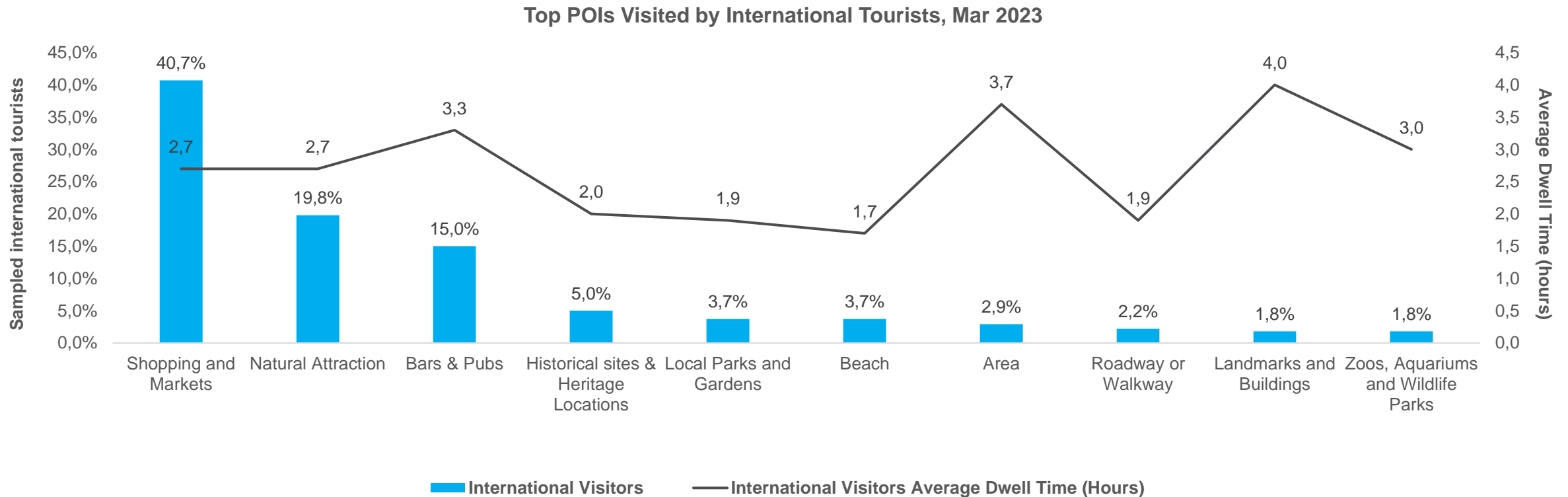
- Shopping and markets was the most popular type of attraction visited by domestic tourists with an average dwell time of 2.4 hours.
- Natural attractions ranked as the second most popular point of interest among domestic tourists.
- Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked third amongst the top POIs visited by domestic tourists, with an average dwell time of 3.1 hours.
- Bars & Pubs were the fourth most popular point of interest and domestic tourists spent on average 3.4 hours at the location.

Top POIs Visited by Domestic Tourists, Mar 2023



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 2.7 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 3.3 hours at the location.
- Among the top 10 POIs visited, international tourists spent the longest time at landmarks & buildings (4.0 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

Primary Study Geography	Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Cape Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have traveled more than 25 miles (40km) and they have stayed in the polygon for more than 120 minutes, they are a tourist.
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists Minimum distance traveled to meet the definition of tourist. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center of the polygon. 	
Secondary Study Geography	Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as a tourist of the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon 	
Point of Interest Study Geography	Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist
Notes and Considerations: <ul style="list-style-type: none"> Any 90 day period refers to any consecutive 90 days in their mobile location data history Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). Filter out people who work at the Tourism Experience. 	
What are Tourist Segments?	
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same Region. Domestic Tourists: Tourists who reside in South Africa outside of Western Cape International Tourists: Tourists who reside outside of South Africa 	

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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