



Tourism Research Overview May 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 five months of 2023 point to sustained recovery and tourism role-players are now hoping for an equally strong demand for travel during the Western Cape's winter period. Key highlights of the overall tourism performance in May 2023 are outlined below:

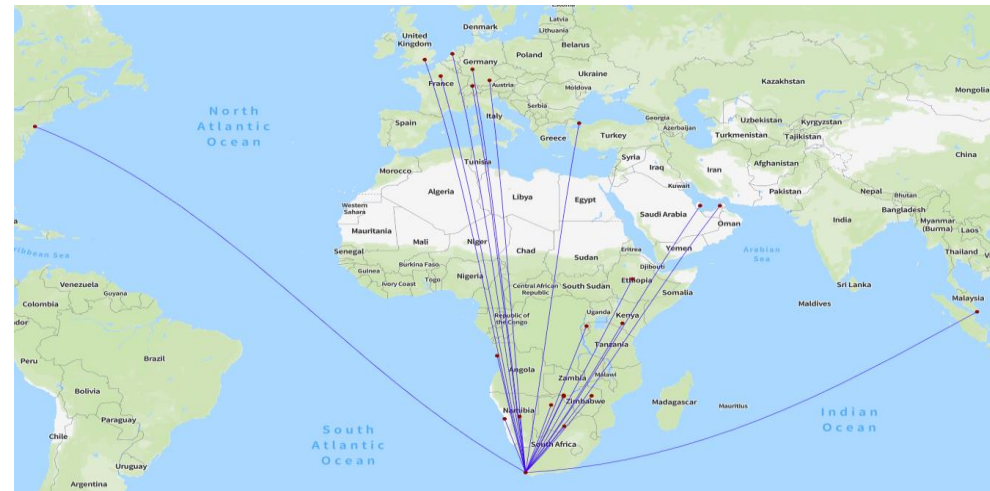
- International two-way passengers through CTIA remained strong between Jan and May 2023, reaching **105% recovery against 2019**.
- **2.7 million domestic two-way passengers** passed through CTIA between Jan and May 2023, an 80% recovery against the same period in 2019.
- George Airport's two-way passengers **reached 327,179 between Jan and May 2023**, a 3% y-o-y increase vs. Jan - May 2022.
- In the month of May 2023, Cape Town recorded a total of **46,966 tourist arrivals via air**, of which **86% originated from overseas markets and 14% from the African continent**. The share of overseas tourists to Cape Town recorded in May 2023 reached full recovery when compared to pre-pandemic levels in May 2019 (44,721).
- **UK led as the top source market to Cape Town (via air) between January and May 2023**, closely followed by Germany, USA, Netherlands and France in the top 5 positions. The European market remains the largest contributor to tourist arrivals into Cape Town, with 6 out of the top 10 source markets originating from the continent.
- The cumulative total of tourist arrivals between January and May 2023 reflected **full recovery from 5 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan-May). These markets included UK (104%), Germany (107%), USS (148%), Canada (103%) and Zimbabwe (176%). In addition, Netherlands (97% recovery) and Belgium (99% recovery) are rapidly nearing full recovery when compared to the same period in 2019.
- Footfall to 14 participating attractions across the five regions of the Western Cape recorded a total of 176,651 visitors in May 2023, a **54% growth in the number of visitors when compared to May 2022 and 82% of what it was in May 2019**.
- **6 out of the 14 participating attractions fully recovered in May 2023** when compared to visitor levels recorded in May 2019.

International passenger recovery between Jan and May 2023 continues to exceed pre-pandemic levels

➤ International two-way passengers remained strong between Jan and May 2023, reaching **105% recovery** against 2019.

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 ytd | 2023 | | | | |
|------------------------|-----------|---------|---------|-----------|-----------|---------|---------|---------|---------|---------|
| | | | | | | Jan | Feb | Mar | Apr | May |
| Two-way passengers | 2 606 398 | 810 811 | 525 441 | 1 895 975 | 1 205 759 | 280 430 | 258 970 | 272 955 | 218 325 | 175 079 |
| YoY growth percentage* | 1% | -69% | -35% | 261% | 82% | 186% | 106% | 70% | 39% | 46% |

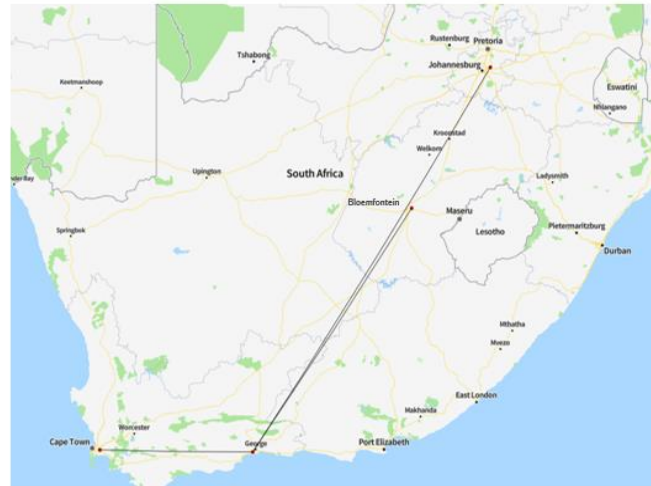
Operating carriers



George Airport two-way passengers reaches 327,179 between Jan and May 2023, a 3% y-o-y increase vs. Jan - May 2022.

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 ytd | 2023 | | | | |
|------------------------|---------|---------|---------|---------|----------|--------|--------|--------|--------|--------|
| | | | | | | Jan | Feb | Mar | Apr | May |
| Two-way passengers | 832 981 | 340 438 | 536 886 | 740 990 | 327 179 | 63 673 | 59 747 | 70 062 | 70 165 | 63 532 |
| YoY growth percentage* | 0% | -59% | 56% | 39% | 3% | 10% | 10% | -3% | -4% | 3% |

Operating carriers








CPT International schedule for May to October 2023

19 airlines, 25 destinations



Rest of Africa

-  **Air Botswana**, Gaborone (GBE), three times per week
-  **Ethiopian Airlines**, Addis Ababa (ADD), 11 flights a week
-  **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 times per week
-  **TAAG**, Luanda (LAD), daily
-  **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**, Manzini (SHO), 3 times per week started 2 June
-  **Proflight Zambia**, Lusaka (LUN), 2 times per week, starting 1 July 2023




Europe

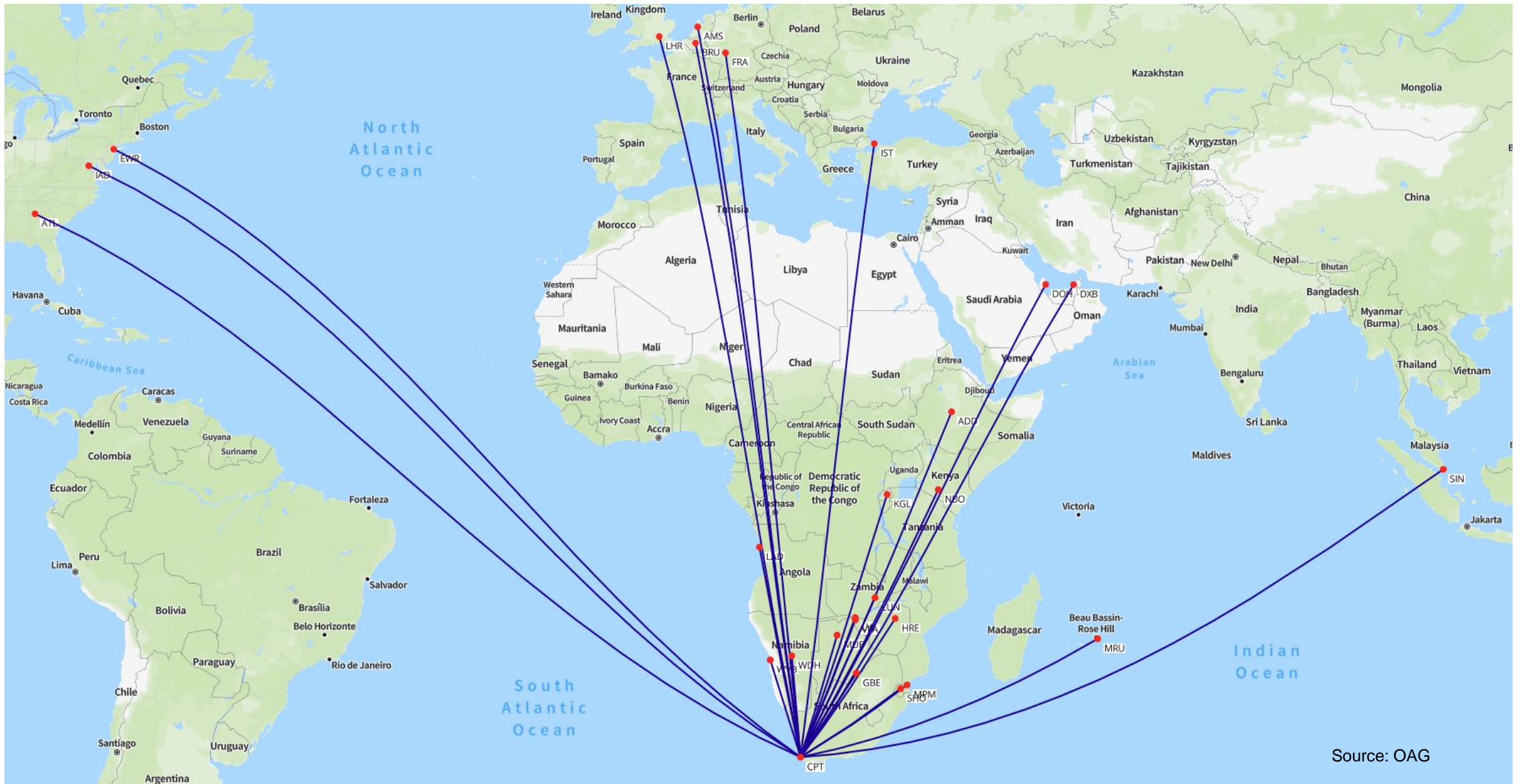
-  **Lufthansa**, Frankfurt (FRA), six times per week
-  **British Airways**, London Heathrow (LHR), daily
-  **KLM**, Amsterdam (AMS), daily
-  **Turkish Airlines**, Istanbul (IST), Daily flight. 5 times per week from 6 May
-  **Air Belgium**, Belgium (BRU), BRU-JNB-CPT-JNB-BRU, twice per week

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 per 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



Source: OAG

Remarkable Growth for Cape Town's African Network between 2015 and 2023

Since 2015, Nine new destinations added

- Addis Ababa, Harare, Victoria Falls, Luanda, Maun, Maputo, Livingstone, Kigali, Nairobi.
- June 2023 - Eswatini #10 + July Lusaka #11



- Started 2015 – 3 flights per week, now daily



- Since 2015 – 5 new routes: Harare, Victoria Falls, Maun, Walvis Bay and Maputo



- Started in 2015 - 3 flights per week via Gaborone B737
From 26 March 2023 – 11 direct non-stop flights per week on A350-900



- Started in 2016 – 3 flights per week NBO-LVI-CPT on E190
From January 2023 – Daily flights; 2 non-stop on B787-8, 5 on E190 with stops in LVI and VFA



- Started in 2018 – 3 flights per week KGL-HRE-CPT on CRJ-900
From December 2022 – 6 flights per week on B737-800 with intention to further expand

Performance of Air Arrivals to Cape Town: May 2023

In the month of **May 2023**, Cape Town recorded a total of **46,966** tourist arrivals via air, of which 86% originated from overseas markets and 14% from the African continent. The share of overseas tourists to Cape Town recorded in May 2023 reached full recovery when compared to pre-pandemic levels in May 2019 (44,721).

TOURIST ARRIVALS TO SOUTH AFRICA BY AIRPORT, MAY 2023

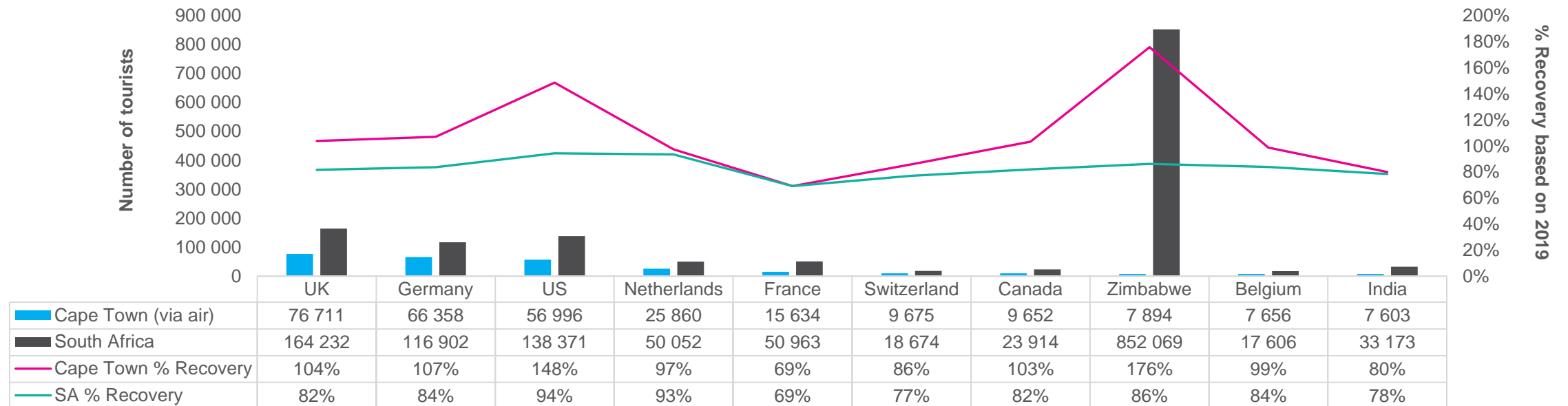
| Source Market | Cape Town | OR Tambo | King Shaka |
|------------------------------------|------------|------------|------------|
| Overseas Tourist Arrivals | 40 239 | 79 084 | 2 668 |
| Africa Tourist Arrivals | 6 595 | 38 565 | 445 |
| Total Tourist Arrivals | 46 966 | 118 422 | 3 115 |
| Overseas % Share of Total Tourists | 86% | 67% | 86% |

Source: StatsSA, 2023

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

- **UK led as the top source market to Cape Town (via air)** between January and May 2023, closely followed by Germany, USA, Netherlands and France in the top 5 positions. The European market remains the largest contributor to tourist arrivals into Cape Town, **with 6 out of the top 10 source markets originating from the continent**.
- The cumulative total of tourist arrivals between January and May 2023 reflected full recovery from **5 out of the top 10 source markets to Cape Town (via air)**, against the same period in 2019 (Jan-May). These markets included UK (104%), Germany (107%), US (148%), Canada (103%) and Zimbabwe (176%). In addition, Netherlands (97% recovery) and Belgium (99% recovery) are rapidly nearing full recovery when compared to the same period in 2019.

Tourist Arrivals to Cape Town (via air) and South Africa, Jan-May 2023

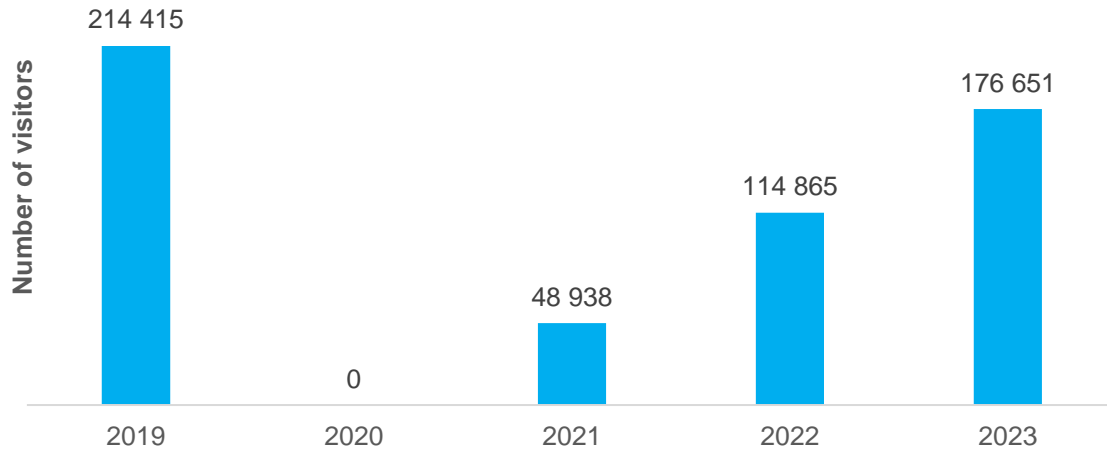


Source: StatsSA, 2023

Western Cape Attractions

- Footfall to 14 participating attractions across the five regions of the Western Cape recorded a total of **176,651** visitors in May 2023, a **54% growth in the number of visitors** when compared to May 2022 and **82% of what it was in May 2019**.
- **6 out of the 14 participating attractions fully recovered** in May 2023 when compared to visitor levels recorded in May 2019.

VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, MAY 2019-2023



*No visitors were recorded during April 2020 due the Covid-19 nationwide lockdown.

| Western Cape Attractions | May 2022/2023 % Change | May 2019/2023 % Recovery |
|---|------------------------|--------------------------|
| Cape Town | | |
| Table Mountain Aerial Cableway | 40% | 80% |
| Table Mountain National Park: Boulders | 78% | 84% |
| Table Mountain National Park: Cape of Good Hope | 60% | 82% |
| Overberg | | |
| Cape Agulhas Lighthouse | 3334% | 81% |
| De Hoop Nature Reserve | 6% | 201% |
| De Mond Nature Reserve | 10% | 104% |
| Harold Porter National Botanical Garden | -14% | 112% |
| Kogelberg Nature Reserve | -9% | 205% |
| Shipwreck Museum | 24% | 33% |
| Garden Route & Klein Karoo | | |
| Cango Caves | 75% | 80% |
| Weskus | | |
| !Khwa ttu | 29% | 140% |
| Winelands | | |
| Protea Tractor Trips | -62% | 70% |
| Birds Paradise | -1% | 67% |
| Viljoensdrift River Cruise | -21% | 120% |

Sources: LTO's, and Attractions, 2023

Visitor Trends Mobile Location Data Insights

Western Cape Mobile Location Data Insights

What is mobile location data?

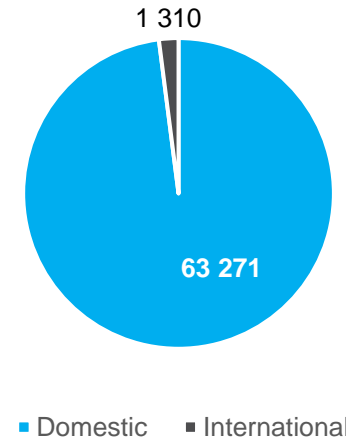
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

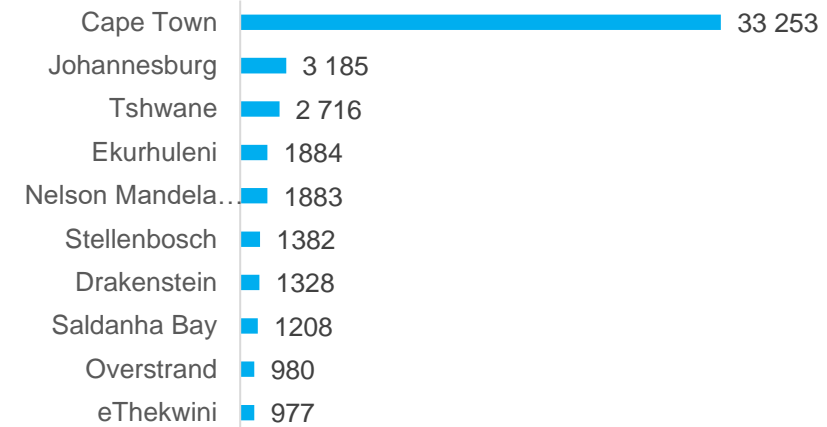
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, 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 **63,271 domestic** and **1,310 international** tourists who visited the Western Cape in May 2023. Within the domestic data set, **33,253** of the sampled tourists were from Cape Town and from the international sampled tourists, **274** were from the United States.

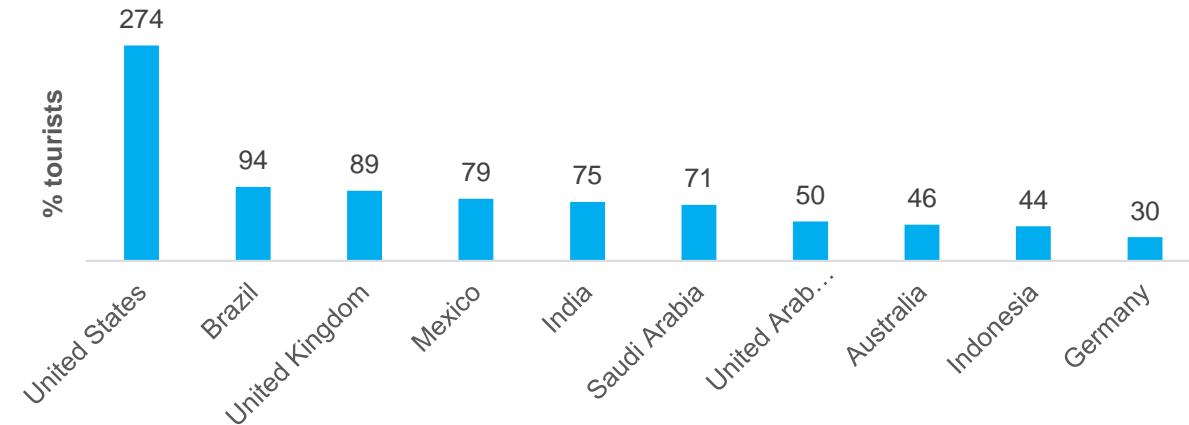
Sample Size, May 2023



Domestic Origin Municipality, May 2023



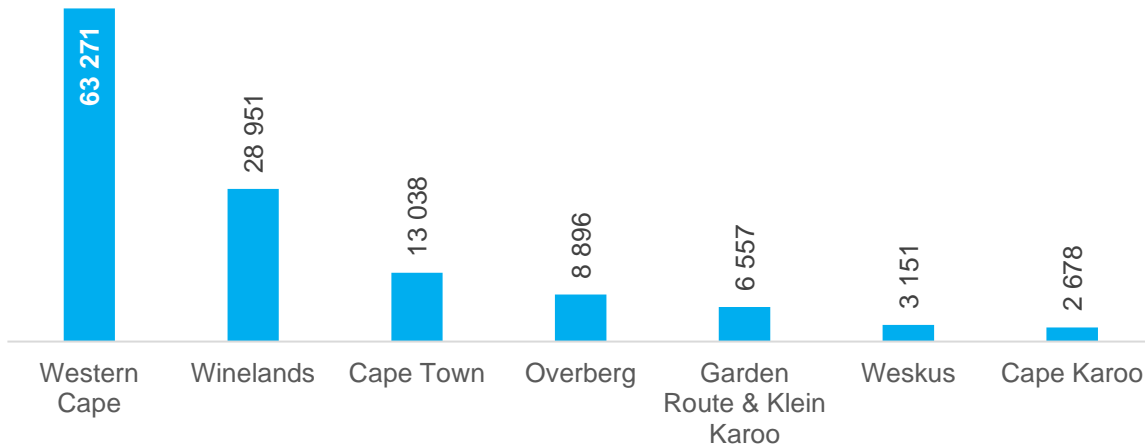
International Origin Country, May 2023



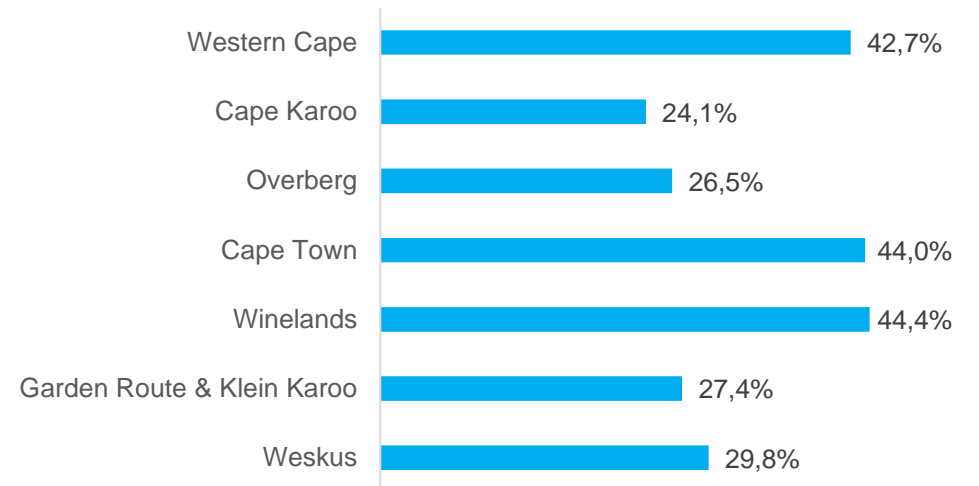
Mobile Insights: Domestic Visitor Trends

- In May 2023, **Winelands (45,8%)** and **Cape Town (20,6%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (4,2%) the least.
- **Cape Town (44,0%)** and **Winelands (44,4%)** was the most popular regions for domestic repeat visits during the month of May.

Domestic Sample Size, May 2023



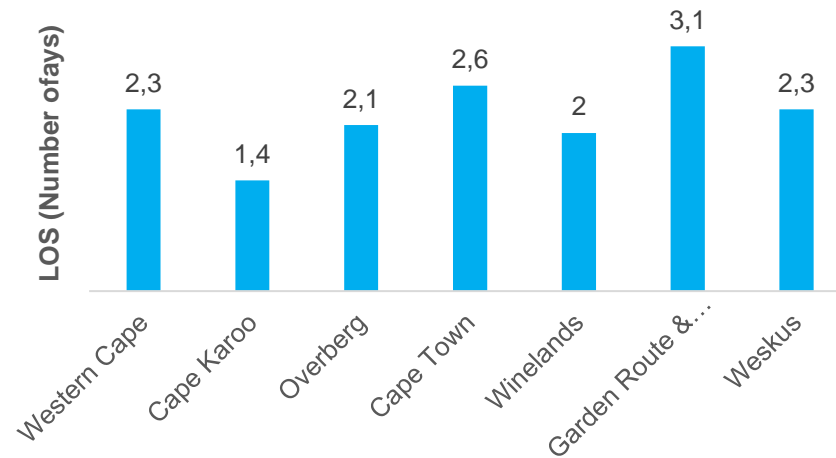
Domestic Repeat Visitors, May 2023



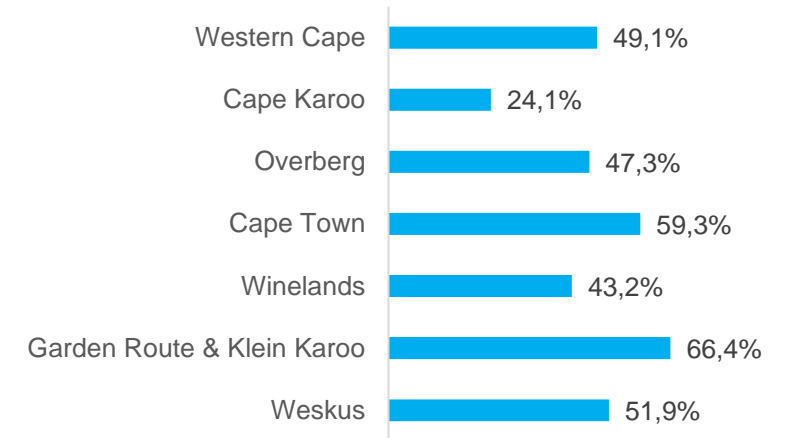
Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent the longest time in the **Garden Route & Klein Karoo (3,1 days)** and **Cape Town (2,6 days)** during May 2023, and the shortest time in the Cape Karoo (1,4 days).
- Close to 70% of sampled tourists** stayed overnight in the Garden Route & Klein Karoo and nearly 60% in Cape Town.
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.

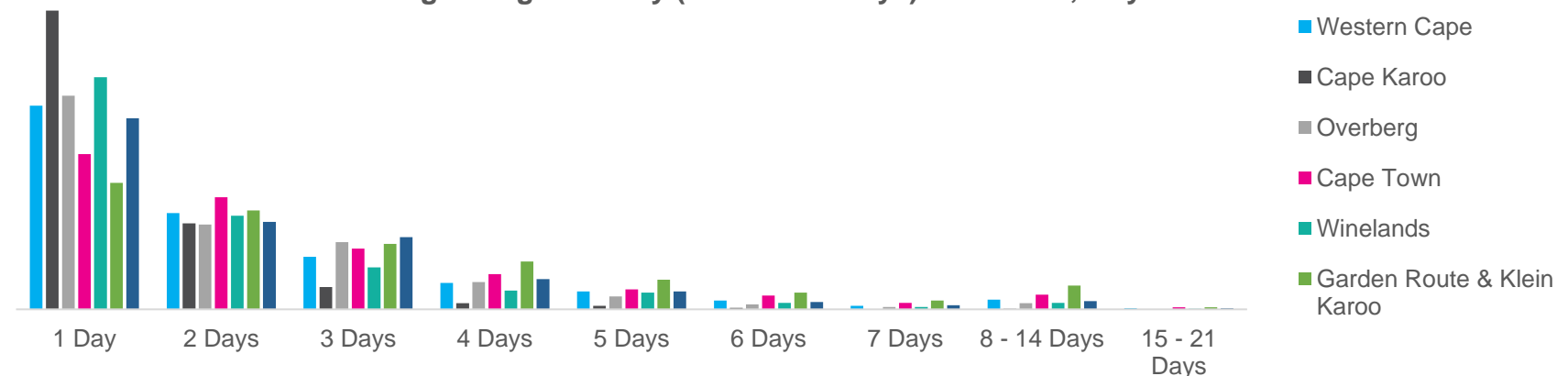
Average Length of Stay (LOS), May 2023



% Overnight Stays, May 2023



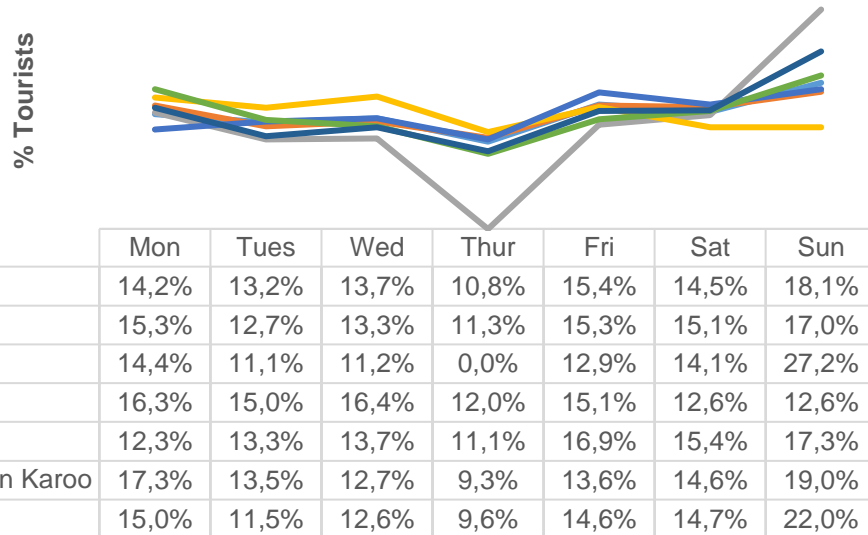
Average Length of Stay (Number of Days): Domestic, May 2023



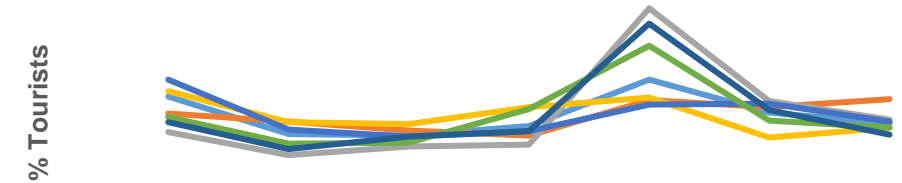
Mobile Insights: Domestic Visitor Trends

- Domestic tourists to the province were most likely to arrive on a Friday and depart on a Sunday. This trend was also seen in the Overberg, Weskus and Garden Route & Klein Karoo regions, pointing to the popularity in weekend stays in the province.
- In the Winelands, Monday was the most popular arrival day and departure was most common on a Sunday.
- Tourists to the Garden Route & Klein Karoo generally arrived on a Friday and departed on a Sunday.

Popular Departure Days of the Week: Domestic, May 2023



Popular Arrival Days of the Week: Domestic, May 2023



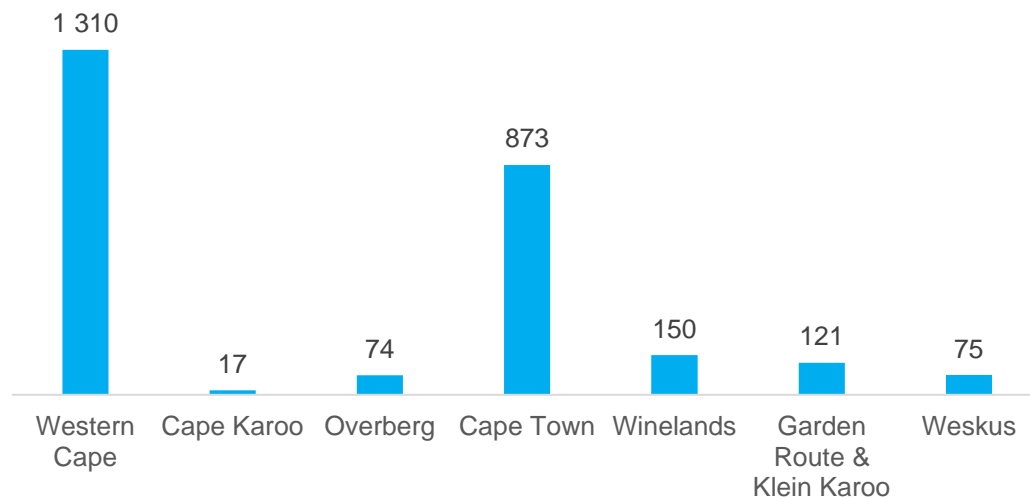
| | Mon | Tues | Wed | Thur | Fri | Sat | Sun |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|
| Western Cape | 16,4% | 12,2% | 12,0% | 13,1% | 18,3% | 14,6% | 13,4% |
| Cape Karoo | 14,5% | 13,6% | 12,6% | 12,0% | 16,0% | 15,2% | 16,1% |
| Overberg | 12,4% | 9,8% | 10,8% | 11,0% | 26,3% | 15,9% | 13,8% |
| Cape Town | 17,0% | 13,5% | 13,3% | 15,2% | 16,3% | 11,8% | 12,9% |
| Winelands | 18,3% | 12,7% | 11,9% | 12,5% | 15,5% | 15,6% | 13,6% |
| Garden Route & Klein Karoo | 14,1% | 11,1% | 11,2% | 15,0% | 22,1% | 13,7% | 12,9% |
| Weskus | 13,5% | 10,5% | 11,9% | 12,5% | 24,6% | 14,9% | 12,1% |

- In the Cape Karoo, which saw majority day visitors, Sunday was the most popular arrival and departure day amongst tourists.
- Cape Town arrival day were most common on a Monday and departure was most popular on a Wednesday.
- 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.

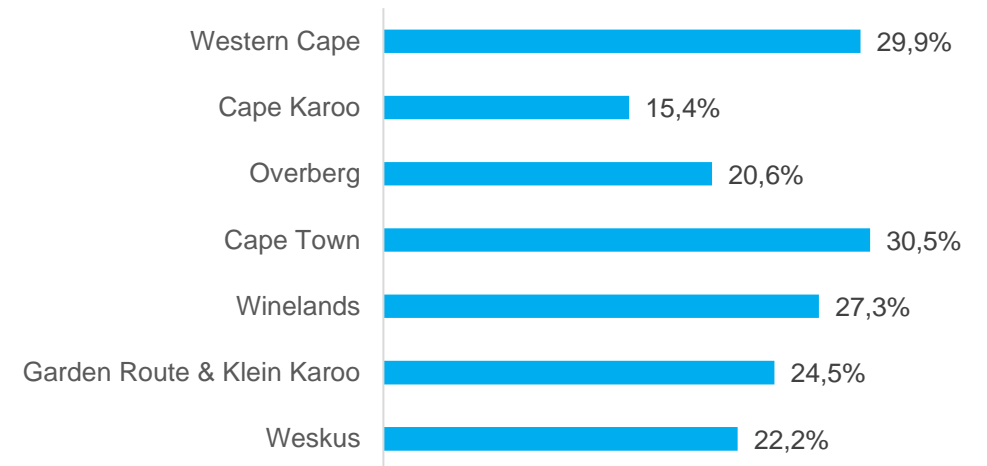
Mobile Insights: International Visitor Trends

- **Nearly 70%** of the sampled international tourists visited Cape Town followed by 11% who visited the Winelands.
- Visitor trends for the Cape Karoo is based on a sample size of only 17 international tourists and therefore does not provide an accurate statistical representation for the region.
- Cape Town (30,5%) and Winelands (27,3%) saw the most international repeat visitors in May 2023.

International Sample Size, May 2023



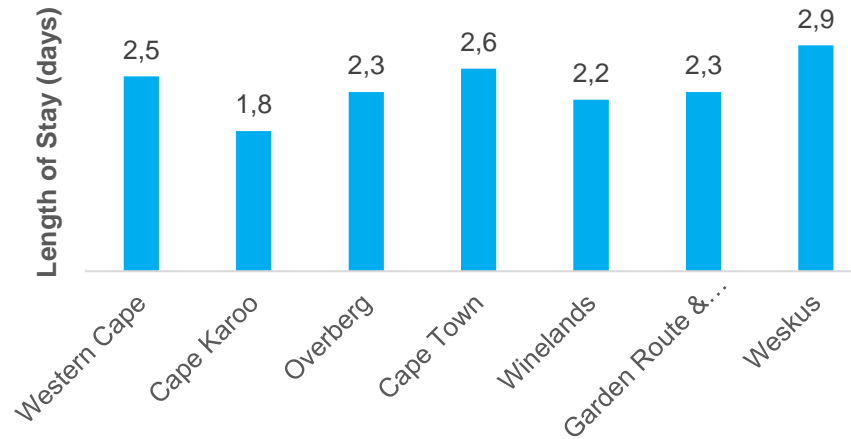
International Tourists Repeat Visits, May 2023



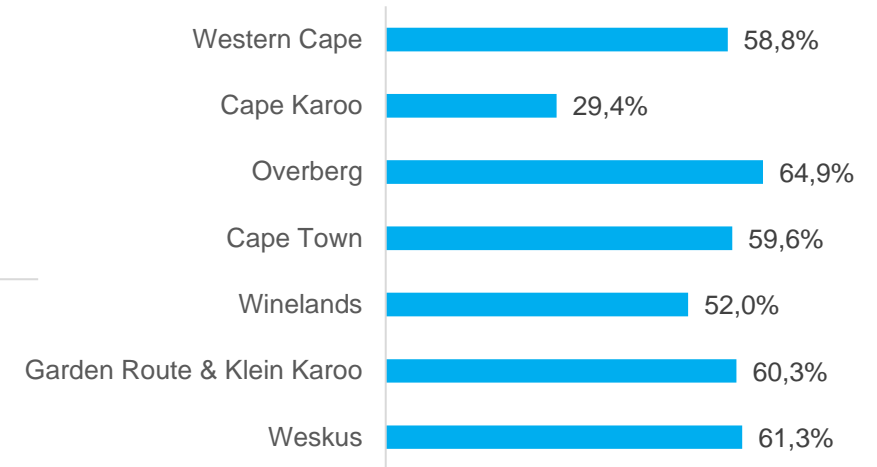
Mobile Insights: International Visitor Trends

- International tourists spent the longest time in the Weskus (2,9 days) and Cape Town (2,6 days).
- Nearly 65% of sampled tourists stayed overnight in the Overberg and over 60% in the Weskus and Garden Route & Klein Karoo regions.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

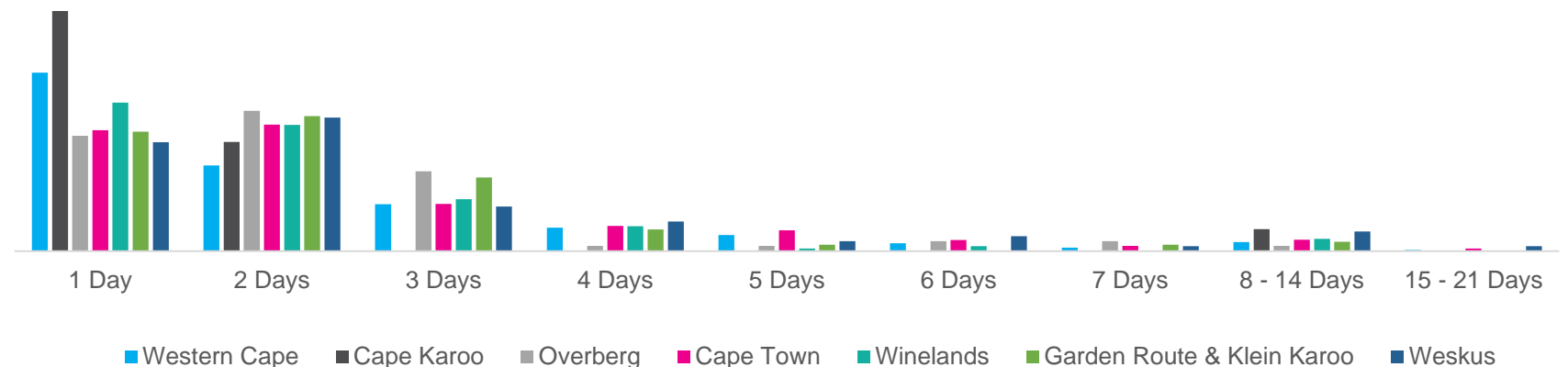
Average Length of Stay (LOS), May 2023



% Overnight Stays, May 2023



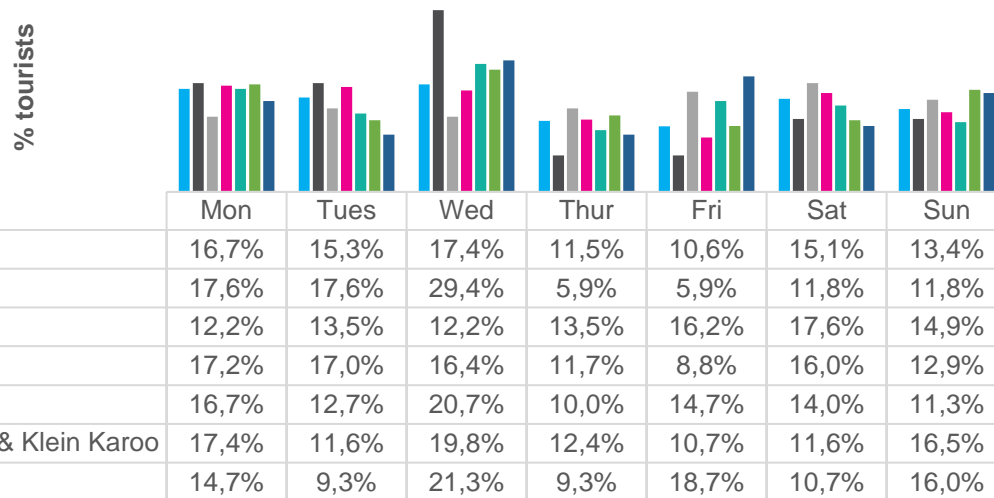
Average Length of Stay (Number of Days): International, May 2023



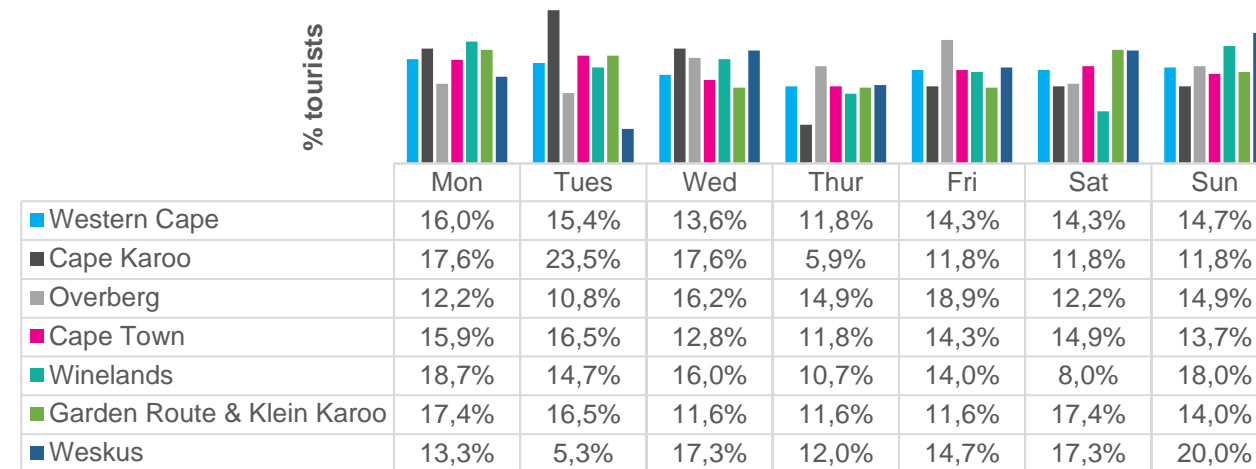
Mobile Insights: International Visitor Trends

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

Popular Departure Days of the Week: International, May 2023



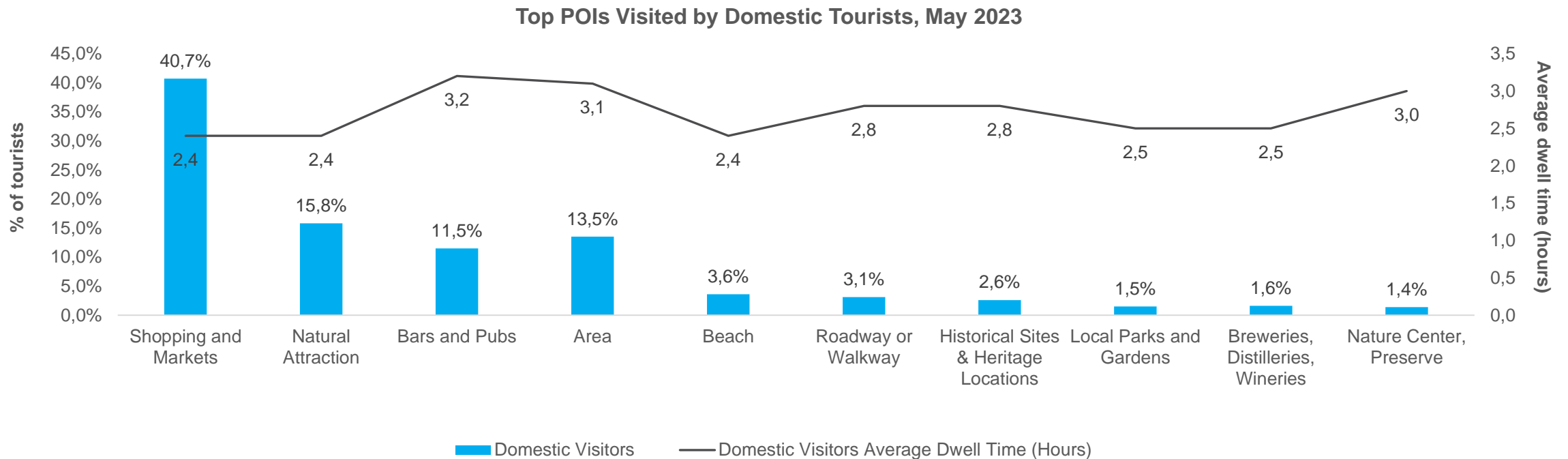
Popular Arrivals Days of the Week: International, May 2023



- The sampled tourists (17) in the Cape Karoo, arrived on a Tuesday and departed mostly on Wednesdays.
- Cape Town arrival day was most common on a Tuesday and departures were on a Monday.
- Friday was the most popular arrival day, and departure days in the Overberg was mostly on a Saturday.
- In the Weskus, Sunday was popular for arrival days and Wednesday for departures.

Points of Interest (POIs) Visited: Domestic Tourists

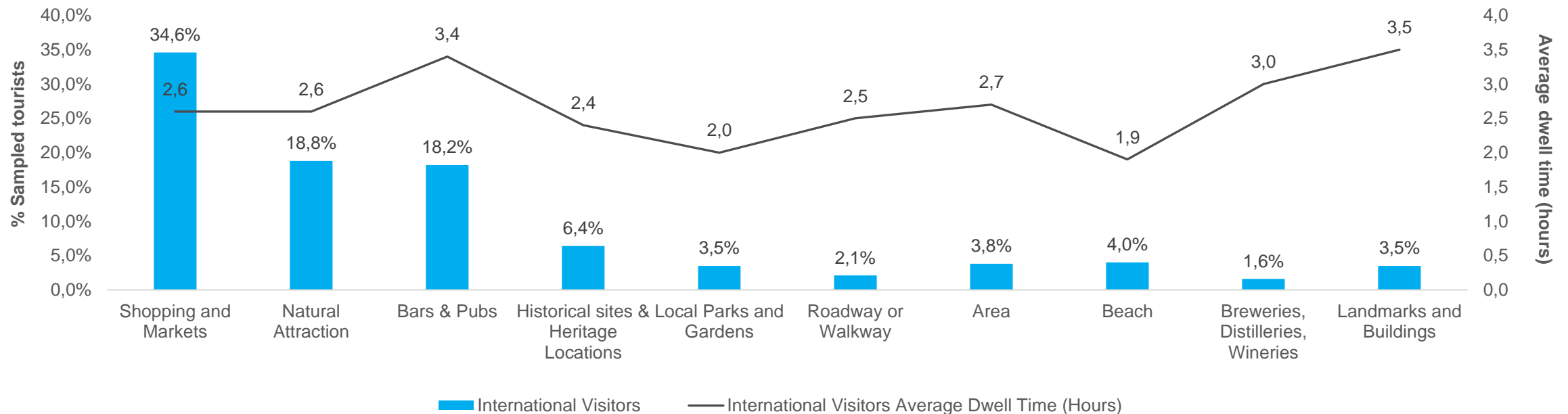
- Shopping and markets was the most popular type of attraction visited by domestic tourists with an average dwell time of 2.4 hours.
- Natural attractions ranked as the second most popular point of interest among domestic tourists.
- Bars & Pubs were the third most popular point of interest and domestic tourists spent on average 3.2 hours at the location.
- Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked fourth amongst the top POIs visited by domestic tourists, with an average dwell time of 3.1 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 2.6 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront ranked as the second most popular POI visited by international tourists.
- Bars & Pubs were the third most popular POI for international tourists who spent on average 3.4 hours at the location.
- Among the top 10 POIs visited, international tourists spent the longest time exploring landmarks and buildings (3.5 hours).

Top POIs Visited by International Tourists, May 2023



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.)

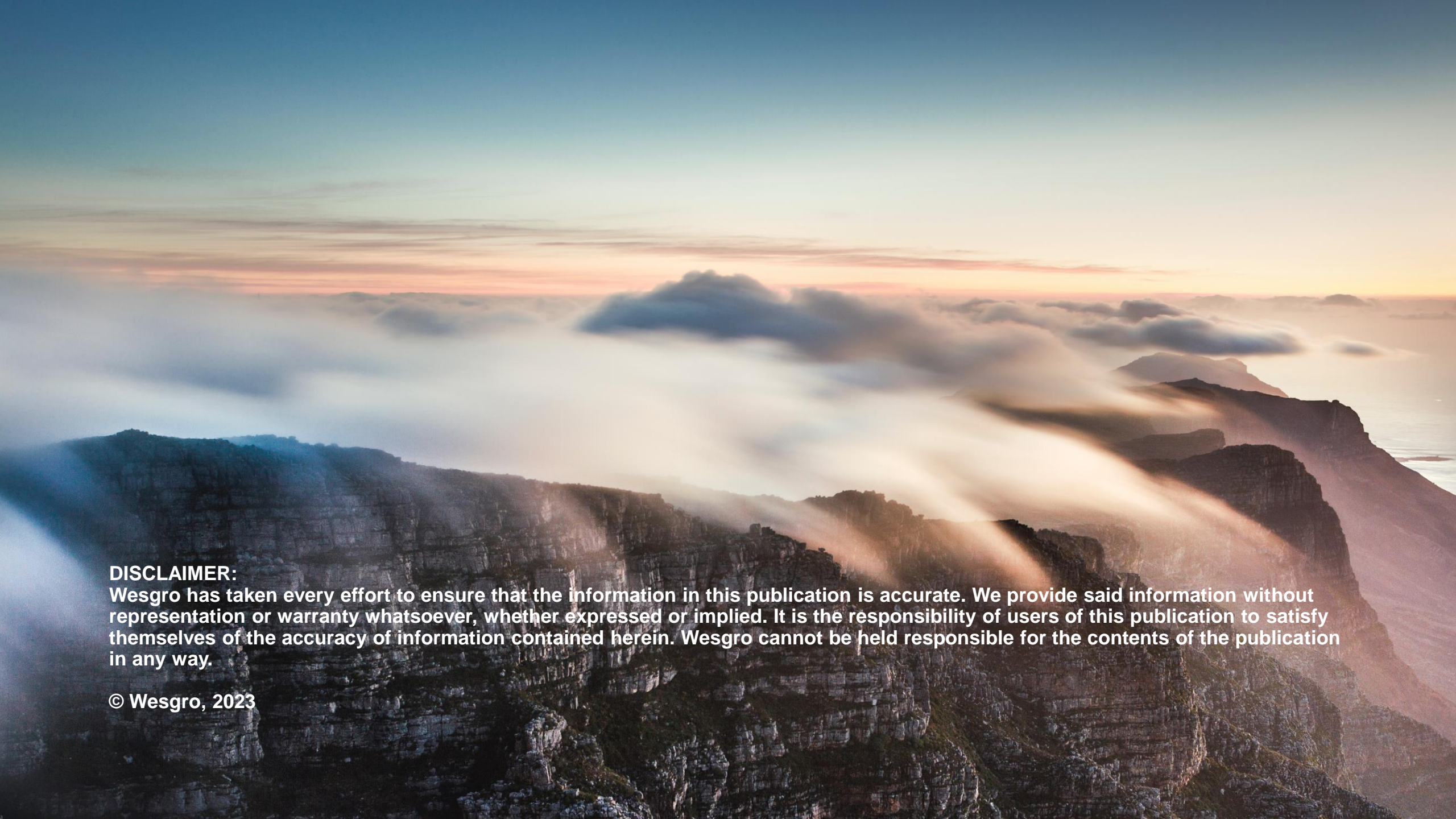
Source: Rove, 2023

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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