Tourism Research Overview October 2022

Cape Town & the Western Cape

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

An Inspiring Place To Do Business

Contents

1. Key Findings

- Tourism recovery in the Western Cape is gaining solid momentum and showing strong signs of a bumper summer season. Cape Town International Airport (CTIA) reflected a notable aviation recovery. Between January and October 2022, two-way passengers through CTIA's international terminal reached a recovery rate of 68% against 2019.
- The domestic terminal recovery was 71% as at October 2022 year to date and passengers through George Airport almost fully recovered to pre-pandemic levels reaching 93%.
- Year to date (as at September 2022), UK ranked as the top source market to Cape Town (via air), followed by USA, Germany, Netherlands and France. Europe sustained its position as the Western Cape's top region for tourist arrivals, with 6 out of the top 10 source markets to Cape Town originating from the continent. In September 2022, Zimbabwe (177%) and India (101%) both exceeded pre-pandemic levels and USA (98%), UK (96%) and Namibia (96%) nearly fully recovered against September 2019.
- Hotel occupancy for the Western Cape stood at 65.6% in October 2022, representing a recovery rate of 95% when compared to October 2019. The Average Daily Rate (ADR) for the Western Cape grew to R1 833.44 and RevPAR (Revenue Per Available Room) reached R1 202.42. Both ADR and REVPAR exceeded October 2019 levels, recovering to 115% and 109% respectively.
- Footfall at 17 participating attractions in the Western Cape recorded a total of 269,016 visitors in October 2022, a 128% year-on-year growth in the number of visitors and a recovery rate of 65% when compared to October 2019.
- The top 5 highest year-on-year growth rates in October 2022 were recorded for Robben Island (181%), Table Mountain National Park: Boulders (159%), Table Mountain National Park: Cape of Good Hope (144%), Cango Caves (133%) and Table Mountain Aerial Cableway (132%).
- 8 out of the 17 participating attractions in the province fully recovered and exceeded their October 2019 visitor numbers.
- In Q3 2022 (July - September), international tourist arrivals to the Western Cape reached 227,402, a significant 414% increase when compared to Q3 2021 and a 30% recovery against Q3 2019 (763,173).
- The Western Cape held the second largest share of Total Foreign Direct Spend (TFDS) in South Africa during Q3 2022, reaching R3.8 billion and registering a year-on-year increase of 414% against the value recorded in Q3 2021 (R743 million).

1. Key Findings

- During Q3 2022, the Western Cape ranked fourth in the most domestic trips originating from the province and third in the number of domestic trips taken to the province.
- Domestic trips originating from the Western Cape in Q3 2022 grew by 748% when compared to Q3 2021 and recovered by 72% against Q3 2019. Domestic trips taken to the Western Cape in Q3 2022 increased by a significant 855% when compared to Q3 2021, a recovery of 67% when compared to Q3 2019.
- Domestic trips between July and September 2022 to the Western Cape were predominantly for holiday (557 491), visiting friends and relatives (505 049) and religion (54 119). Amongst all provinces, the Western Cape recorded the third largest share of domestic trips taken for visiting friends and relatives and the second largest share of trips taken for holiday.
- Total domestic spend in the Western Cape reached R3.3 billion between July and September 2022. The Western Cape accounted for 15% of South Africa's total domestic spend and ranked in third position for the highest value in domestic expenditure amongst all provinces. When compared to the same quarter in 2021, the Western Cape's domestic spend increased by 155% year-on-year and domestic expenditure in the province exceeded pre-pandemic levels, recovering to 139% against Q3 2019.
- Based on mobile location data insights of 56 949 domestic and 1 393 international tourists, the Winelands was the most popular region visited among domestic tourists while international tourists mainly spent time in Cape Town. On average, both domestic and international tourists spent the longest time in the Garden Route & Klein Karoo and Cape Town regions. The Winelands was the most popular region for repeat visits among the domestic sample and Cape Town saw the most repeat visits among the international sample. The weekend stay trend among domestic tourists was apparent across all regions during October 2022, which reflected Friday as the most common arrival day and Sunday as the most frequent day of departure.
- Shopping and markets was the most popular type of attraction visited by domestic, international and local tourists. Prominent shopping points included the V&A Waterfront, Willowbridge and Tygervalley. Domestic tourists spent on average 2.5 hours shopping while international tourists shopped for 2.6 hours. Natural attractions, particularly Cape Point, Table Mountain and Knysna Waterfront were popular with both domestic and international tourists.

2. CPT INTERNATIONAL Terminal Passenger Performance

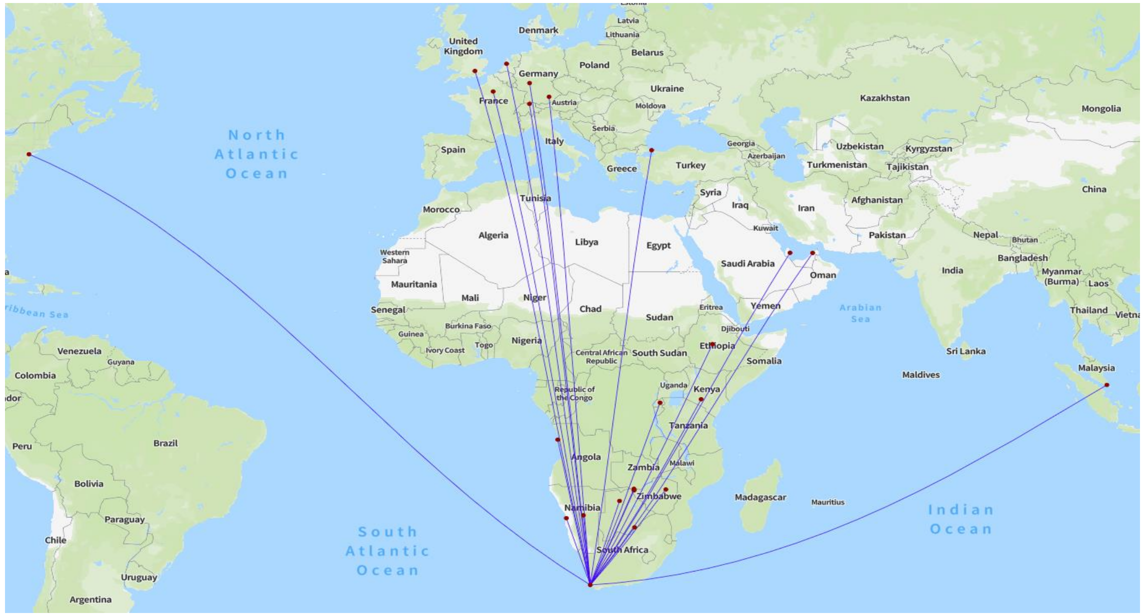
Year/Month	2019	2020	2021	2022 May	2022 Jun	2022 Jul	2022 Aug	2022 Sept	2022 Oct	Year-to-date
Two-way passengers	2 606 398	810 811	525 441	119 729	124 783	150 938	148 366	152 843	175 648	1 413 598
Passenger recovery*	100%	31%	20%	74%	73%	87%	83%	81%	83%	68%
Two-way air cargo volumes (tonnes)	63 015	31 929	41 665	4 257	3 865	3 529	3 763	-	-	32 389
Volume recovery*	100%	51%	66%	82%	83%	59%	85%	-	-	80%

* Recovery compared to same period in 2019

Passenger data source: ACSA
Air cargo data source: Seabury

Operating carriers

- British Airways
- Kenya Airways – The Pride of Africa
- Singapore Airlines
- Air Botswana
- Ethiopian
- KLM
- Lufthansa
- RwandAir
- TAAG
- FlyNamibia
- United
- Turkish Airlines
- Qatar Airways
- Airlink
- Emirates



3. CPT DOMESTIC Terminal Passenger Performance

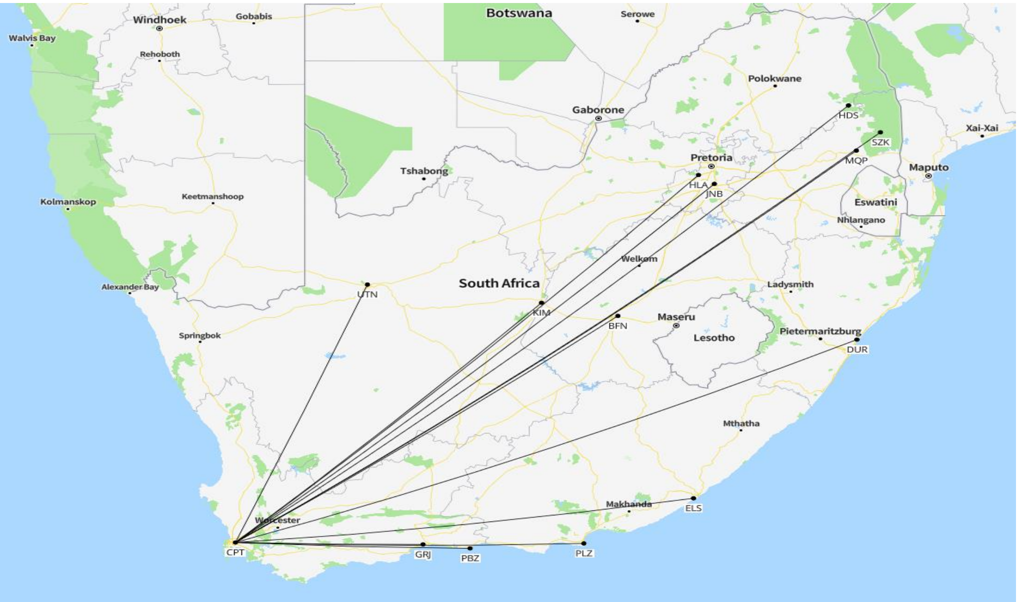
Year/Month	2019	2020	2021	2022						
				May	Jun	Jul	Aug	Sept	Oct	Year-to-date
Two-way passengers	8 363 307	3 167 542	4 221 365	504 172	407 626	456 785	458 979	486 396	528 817	4 881 025
Passenger recovery*	100%	38%	50%	83%	62%	68%	67%	66%	73%	71%
Average load factor	78%	64%	67%	Arr 75% Dep 73%	Arr 84% Dep 91%	Arr 91% Dep 85%	Arr 88% Dep 88%	Arr 90% Dep 91%	Arr 91% Dep 89%	

* Recovery compared to same period in 2019

Passenger data source: ACSA
Air cargo data source: Seabury

Operating carriers

FlyCemAir, FlySafair, lift, South African Airways, Airlink



4. George Airport (GRJ) Passenger Performance

Year/Month	2019	2020	2021	2022						
				May	Jun	Jul	Aug	Sept	Oct	Year-to-date
Two-way passengers	832 981	340 438	536 886	61 290	56 116	62 926	60 240	60 790	63 922	618 073
Passenger recovery*	100%	41%	64%	97%	86%	103%	92%	86%	90%	93%

* Recovery compared to same period in 2019

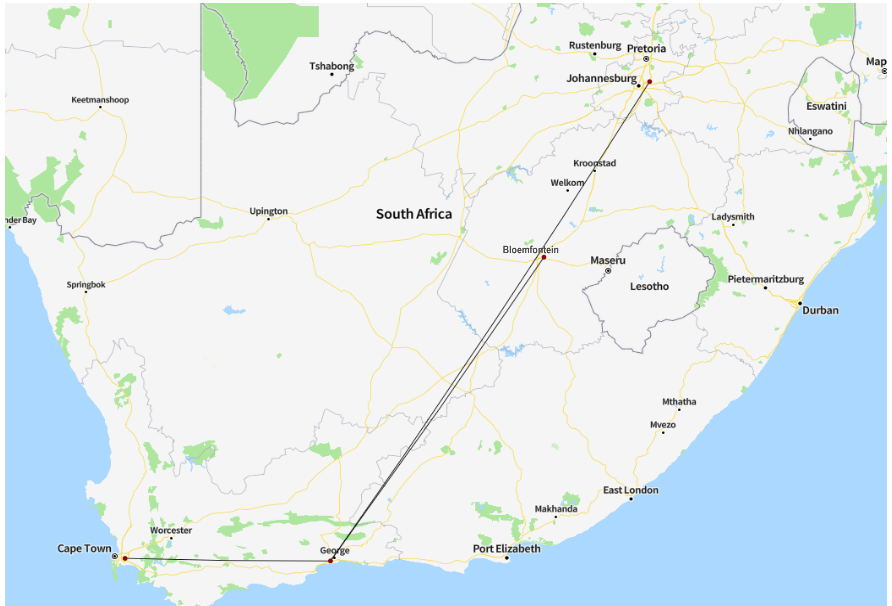
Passenger data source: ACSA

Operating carriers

Fly CemAir

FlySafair For the love of flying

AIRLINK



5. CPT Route and Airline Update – 10 November 2022

Asia and Middle East

- **Emirates** operates daily, DXB-CPT. Will operate double daily from Jan 2023
- **Qatar Airways**, 10 times a week, DOH-CPT, daily during WC Soccer, double daily from 6 Jan 2023
- **Singapore Airlines** operates daily service, SIN-JNB-CPT-JNB-SIN

Rest of Africa

- **Air Botswana**, Gaborone, three times per week
- **Ethiopian Airlines**, Addis Ababa, daily flight
- **FlyNamibia**, Windhoek, six time per week
- **Kenya Airways**, Nairobi direct, twice per week, Nairobi – Livingstone, twice per week and Nairobi - Victoria Falls, twice per week
- **TAAG**, Luanda, six times per week
- **RwandAir**, Kigali-Harare, six times per week
- **Airlink**, Windhoek, three times a day
  Walvis Bay, daily
  Harare, daily
  Victoria Falls, six times per week
  Maun, daily
  Maputo, three times per week
- **Air Mauritius**, Mauritius, twice per week, restarting 16 November

Europe

- **Lufthansa**, Frankfurt, three times per week
  Munich seasonal service returned 28 Oct with a daily flight
- **British Airways**, London Heathrow, daily service. Twice daily from 13 Nov
  Seasonal London Gatwick service three times per week from 13 Dec
- **KLM**, Amsterdam, operates 10 times per week
- **Turkish Airlines**, Istanbul, Daily flight started 31 Oct
- **Edelweiss,** Zurich**,** resumed 26 September, three times a week
- **Air Belgium**, Brussels, new service, twice per week, started 14 September
- **Condor,** Frankfurt seasonal service restarted 4 October, three times a week.
- **Virgin Atlantic**, London Heathrow restarted 5 November, daily seasonal service
- **Air France**, Paris, returned 30 Oct, seasonal service three times per week

North America

- **United Airlines**, Newark, year-round service, three times per week.
- Washington D.C. direct service from 18 Nov 2022, three times per week
- **Delta Air Lines,** Atlanta direct service from 19 Dec, three times a week.
- Triangular route between *ATL-JNB-CPT-ATL* starts 2 Dec, four times a week

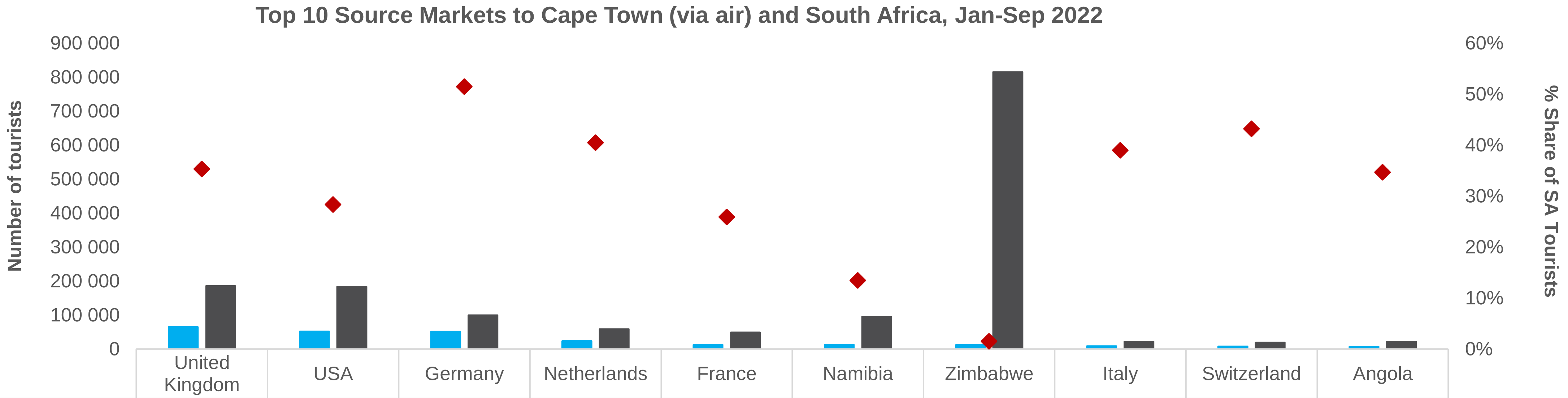
Source: Wesgro Air Access, 2022

6. Top International Source Markets to Cape Town (via air)

- Year-to-date (as at September 2022), the top source market to Cape Town (via air) was the **UK**, followed by **USA, Germany**, **Netherlands** and **France**.

- **Namibia** (12 940 tourist arrivals) **led as the top source market from the African continent to Cape Town, closely followed by Zimbabwe** with 12 598 tourist arrivals. Among the top ten list, **Zimbabwe** was the only country to Cape Town that **exceeded pre-pandemic levels** (169% recovery rate).

- Into the first 9 months of 2022, **Cape Town held the largest (52%) share of German tourist** arrivals to South Africa.

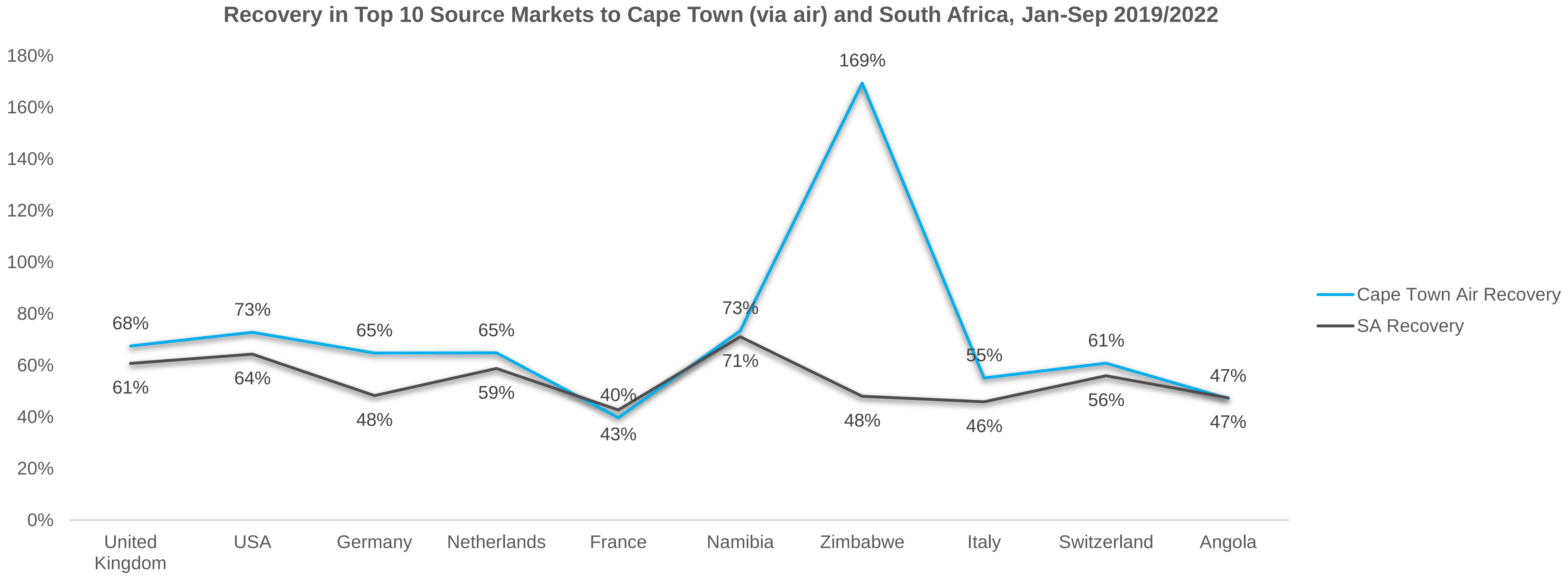


	United Kingdom	USA	Germany	Netherlands	France	Namibia	Zimbabwe	Italy	Switzerland	Angola
Cape Town via Air	65 733	52 346	51 524	24 032	12 953	12 940	12 598	8 777	8 581	7 893
South Africa	185 949	184 330	99 986	59 314	49 879	95 763	815 616	22 476	19 854	22 715
% Share of SA Tourists	35%	28%	52%	41%	26%	14%	2%	39%	43%	35%

Source: StatsSA, 2022

6. Top International Source Markets to Cape Town (via air)

- **Tourist arrivals from the UK to Cape Town (via air) grew** from 3 298 between January and September 2021 to 65 733 over the same period in 2022. In the month of **September 2022**, UK tourists recovered to a remarkable **96%** against the September 2019 figure.



Source: StatsSA, 2022

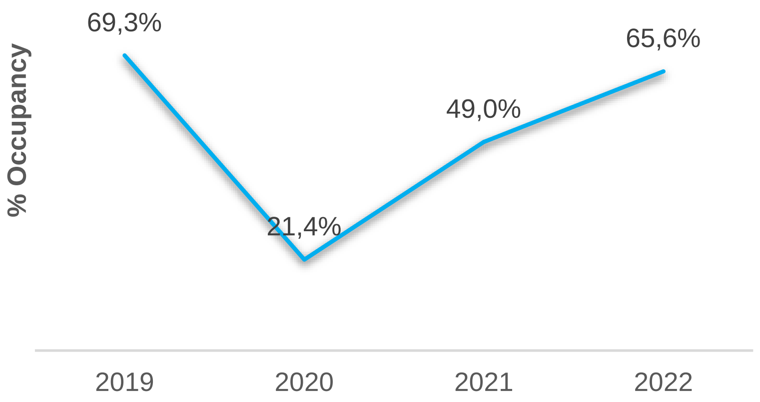
7. Hotel Occupancy in the Western Cape

- **Occupancy** in the Western Cape, at **65,6%** in October 2022, **increased by 33.8%** when compared to 49,0% in the same month of 2021, reaching a **recovery rate of 95%** when compared to the 69,3% occupancy recorded in October 2019.

- **The Average Daily Rate (ADR)** for the Western Cape grew to **R1 833.44** in October 2022 with a **recovery rate of 115%** on its 2019 figure.

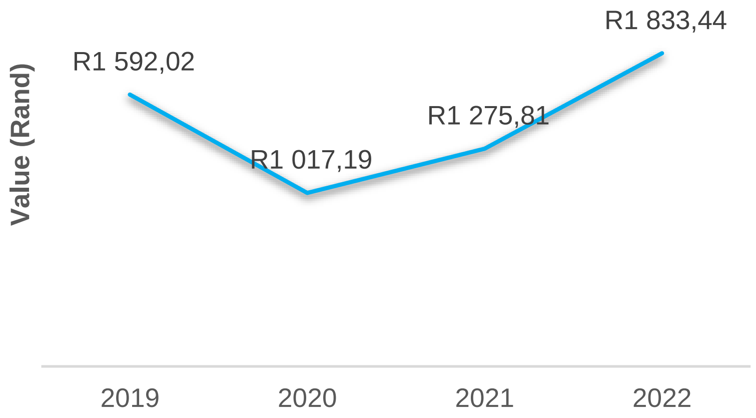
- At **R1 202.42** in October 2022, **RevPAR (Revenue Per Available Room) grew by 92,3%** against its 2021 figure and **recovered to 109%** of what it was in October 2019.

Western Cape Occupancy, Oct 2019-2022



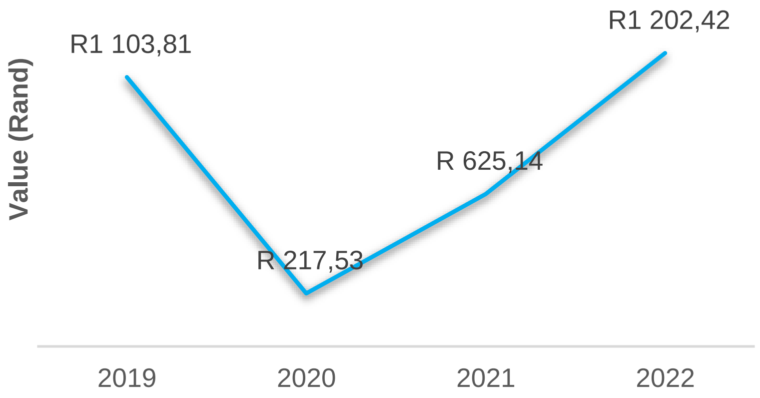
Source: STR, 2022

Western Cape ADR, Oct 2019-2022



Source: STR, 2022

Western Cape RevPAR, Oct 2019-2022



Source: STR, 2022

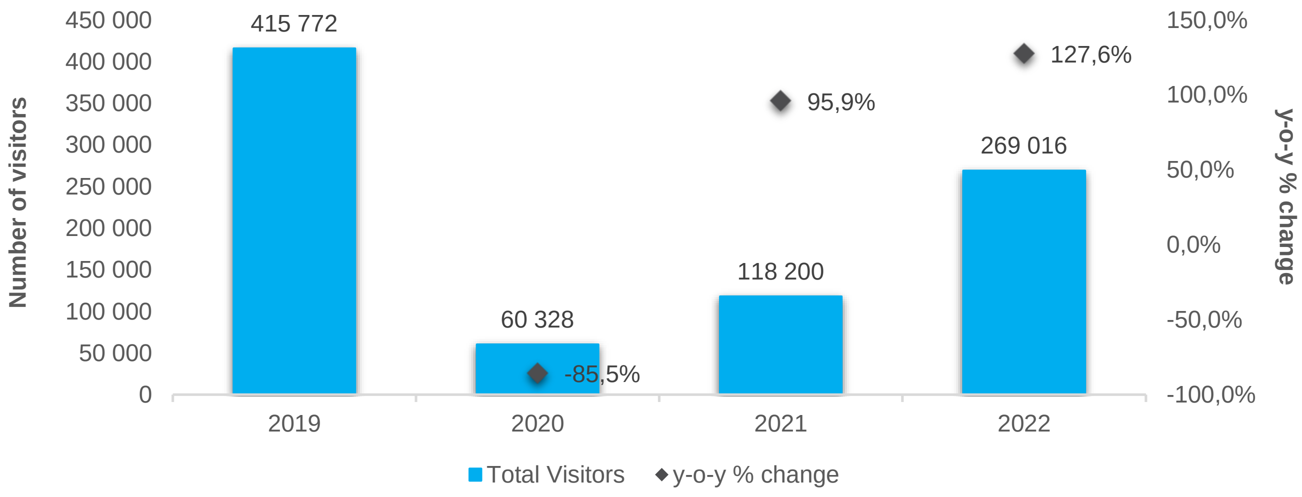
8. Western Cape Attractions

- Visitors to the 17 participating attractions across the province recorded close to **270 000 visitors** in October 2022, a **128% growth in the number of visitors** when compared to the same month last year and **65% of what it was in October 2019**.

- **The top 5 highest year-on-year growth** rates in October 2022 were recorded for Robben Island (181%), Table Mountain National Park: Boulders (159%), Table Mountain National Park: Cape of Good Hope (144%), Cango Caves (133%) and Table Mountain Aerial Cableway (132%).

- **8 out of the 17 participating attractions fully recovered** and exceeded their October 2019 figures.

VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, OCT 2019 - 2022



Western Cape Attractions	Oct 2021/2022 % Change	Oct 2019/2022 % Recovery
Cape Town		
Table Mountain Aerial Cableway	132%	58%
Table Mountain National Park: Boulders	159%	66%
Table Mountain National Park: Cape of Good Hope	144%	62%
Robben Island	181%	76%
Overberg		
Cape Agulhas Lighthouse	13%	64%
De Hoop Nature Reserve	75%	121%
De Mond Nature Reserve	-21%	131%
Harold Porter National Botanical Gardens	31%	121%
Kogelberg Nature Reserve	-41%	142%
Stony Point	38%	57%
Shipwreck Museum	-30%	38%
Garden Route & Klein Karoo		
Cango Caves	133%	68%
Weskus		
!Khwa ttu	53%	113%
Old Jail	-37,8%	77%
Winelands		
Protea Tractor Trips	83%	199%
Birds Paradise	3%	164%
Viljoensdrift River Cruise	34%	289%

Sources: LTO's, and Attractions, 2022

Provincial Tourism Performance
July-September 2022

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9.1 International Tourist Arrivals by Province: Jul-Sep 2022

- International tourist arrivals to the Western Cape reached **227,402** between July and September 2022, a significant **414% increase** when compared to the same period in 2021. Tourist arrivals to the province recovered by 30% when compared to the same period in 2019 (763,173).

International Tourist Arrivals by Province: Q3 (July-September) 2022				
Province	**Q3 2019**	**Q3 2021**	**Q3 2022**	**% Growth Q3 2022 vs Q3 2021**
Gauteng	1 156 362	223 552	606 293	171,2%
Western Cape	**763 173**	**44 253**	**227 402**	**413,9%**
Eastern Cape	185 066	10 164	50 737	399,2%
KwaZulu Natal	271 589	65 466	163 373	149,6%
Mpumalanga	470 239	132 020	342 209	159,2%
Limpopo	468 780	25 835	166 613	544,9%
North West	202 613	32 436	75 253	132,0%
Northern Cape	35 261	18 561	29 561	59,3%
Free State	286 942	55 813	186 298	233,8%
South Africa	**3 840 025**	**608 100**	**1 847 739**	**203,9%**

Source: South Africa Tourism (SAT), Departure Survey Q3 (July-September) 2022
Note: No international data was collected for July – September 2020, owing to the Covid-19 pandemic.

9.2 Total Foreign Direct Spend by Province: Jul-Sep 2022

- Total Foreign Direct Spend between July and September 2022 amounted to **R3.8 billion in the Western Cape**, registering a year-on-year **increase of 414%** against the value recorded in Q3 2021 (R743 million), and recovered to 49% of what it was in Q3 2019.

- In Q3 2022, the Western Cape held the **second largest share of Total Foreign Direct Spend** in South Africa, following Gauteng.

Total Foreign Direct Spend by Province: Q3 (July-September) 2022				
Province	Q3 2019	Q3 2021	Q3 2022	% Growth Q3 2022 vs Q3 2021
Gauteng	R4 096 368 366	R2 101 914 805	R5 875 332 521	179,5%
Western Cape	**R7 776 652 244**	**R742 541 314**	**R3 815 310 837**	**413,8%**
Eastern Cape	R352 525 595	R197 694 455	R832 082 194	320,9%
KwaZulu Natal	R801 348 954	R432 326 089	R1 177 726 967	172,4%
Mpumalanga	R910 657 278	R502 552 921	R1 382 585 711	175,1%
Limpopo	R1 787 414 992	R392 313 431	R1 340 125 466	241,6%
North West	R237 608 131	R143 587 780	R362 794 093	152,7%
Northern Cape	R84 540 673	R81 921 311	R260 394 072	217,9%
Free State	R378 062 259	R210 659 466	R419 765 897	99,3%
South Arica	**R16 425 178 492**	**R4 805 511 572**	**R15 466 117 758**	**221,8%**

Source: South Africa Tourism (SAT), Departure Survey Q3 (July-September) 2022

Note: No international data was collected for July – September 2020, owing to the Covid-19 pandemic.

9.3 Total Domestic Trips by Province: Jul-Sep 2022

- In Q3 2022, the Western Cape **ranked fourth** in the most domestic trips **originating from the province** and **third in the number of domestic trips taken to the province.**

- Domestic trips originating from the Western Cape in Q3 2022 grew by **748%** when compared to Q3 2021 and **recovered by 72%** against Q3 2019. Domestic trips taken to the Western Cape in Q3 2022 **increased by a significant 855%** year-on-year**,** a **recovery of 67%** when compared to Q3 2019.

- During Q3 2022, domestic trips taken to the Western Cape were predominantly for holiday (557 491), visiting friends and relatives (505 049) and religion (54 119). Amongst all provinces, the Western Cape recorded the **third largest share** of domestic trips taken for VFR* and the **second largest** share of trips taken for holiday.

Province	Trips by Province of Origin			
	Q3 2019	Q3 2020	Q3 2021	Q3 2022
Eastern Cape	446 062	891 093	1 078 357	1 018 814
Free State	728 562	407 485	47 388	648 264
Gauteng	2 656 571	1 090 438	453 644	1 476 210
KwaZulu Natal	1 512 240	1 234 653	322 617	1 248 908
Limpopo	644 352	621 237	57 159	1 526 510
Mpumalanga	1 268 562	311 542	280 096	742 376
Northern Cape	370 586	176 724	248 592	216 757
North West	1 294 691	268 453	278 112	624 566
Western Cape	**1 629 532**	**851 756**	**138 838**	**1 177 797**
Total	**10 551 157**	**5 853 381**	**2 904 803**	**8 680 202**

Province	Trips by Province of Destination			
	Q3 2019	Q3 2020	Q3 2021	Q3 2022
Eastern Cape	537 065	856 116	1 040 514	1 250 408
Free State	974 926	860 884	124 873	897 619
Gauteng	2 142 721	1 089 519	364 335	1 101 281
KwaZulu Natal	1 877 142	1 303 812	495 313	1 797 697
Limpopo	1 164 873	458 511	155 686	1 618 137
Mpumalanga	1 142 846	969 000	416 623	724 882
Northern Cape	575 285	113 114	255 644	127 881
North West	1 170 488	313 229	328 835	588 974
Western Cape	**1 961 153**	**744 294**	**136 664**	**1 304 553**
Total	**11 546 498**	**6 708 479**	**3 318 488**	**9 411 432**

Source: South Africa Tourism (SAT) Domestic Tourism Survey, Q3 (July-September) 2022

**VFR- Visiting friends and relatives*

9.3 Total Domestic Spend by Province: Jul-Sep 2022

- Total domestic spend in the Western Cape reached **R3.3 billion** between July and September 2022. The Western Cape accounted for **15%** of South Africa's total domestic spend and ranked in **third position for the highest value in domestic expenditure** amongst all provinces.

- When compared to the same quarter in 2021, the Western Cape's domestic spend **increased by 155%** year-on-year and domestic expenditure in the province exceeded pre-pandemic levels, **recovering to 139% against Q3 2019**.

Province	Domestic Spend by Province			
	Q3 2019	Q3 2020	Q3 2021	Q3 2022
Eastern Cape	R754 923 671,51	R1 385 170 920,65	R2 307 641 509,14	R1 971 273 529,17
Free State	R940 233 945,23	R203 715 568,96	R26 708 721,44	R965 581 758,50
Gauteng	R4 836 430 818,77	R3 088 793 868,80	R3 564 280 272,58	R6 544 450 525,00
KwaZulu-Natal	R1 687 792 393,56	R6 500 014 948,63	R1 200 747 934,53	R3 733 493 890,00
Limpopo	R357 490 782,76	R1 123 233 834,99	R41 154 295,77	R2 396 813 531,50
Mpumalanga	R751 099 329,88	R184 218 184,93	R478 378 870,82	R1 310 973 902,00
Northern Cape	R575 092 141,64	R550 291 239,46	R716 951 723,85	R983 911 905,33
North West	R725 100 493,47	R214 444 984,91	R922 723 457,43	R1 387 521 970,00
Western Cape	**R2 365 121 930,73**	**R1 629 508 418,39**	**R1 288 833 418,45**	**R3 291 441 539,00**
Total	**R12 993 285 507,55**	**R14 879 391 969,74**	**R10 547 420 204,02**	**R22 585 462 550,50**

Source: South Africa Tourism (SAT) Domestic Tourism Survey, Q3 (July-September) 2022

Visitor Trends
Mobile Location Data Insights

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10. Western Cape Mobile Location Data Insights

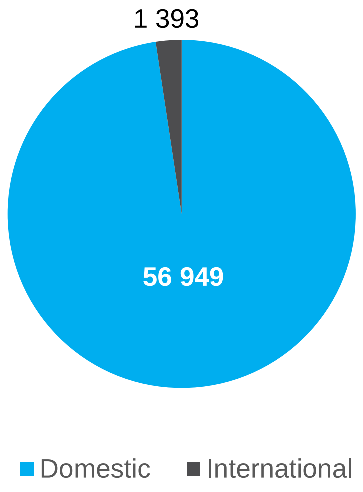
What is mobile location data?

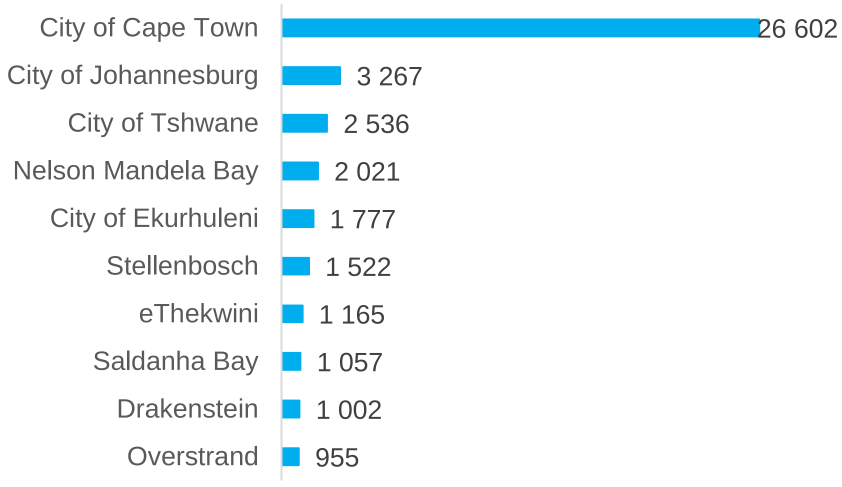
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can "opt in" to location sharing (or choose not to "opt in"). When they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

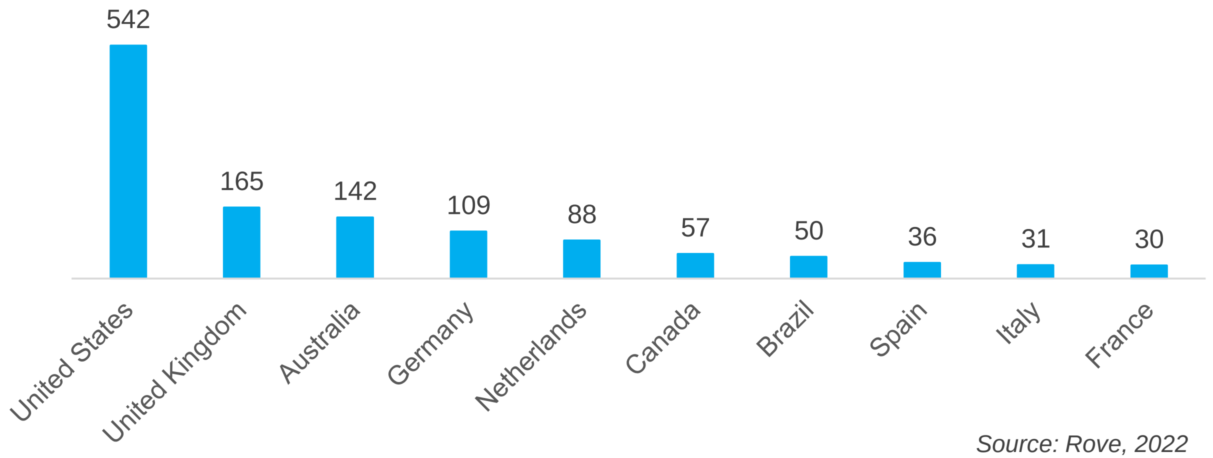
Why use mobile location data insights?

- 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 **56 949 domestic** and **1 393 international** tourists who visited the Western Cape in October 2022. Within the domestic data set, **26 602** of the sampled tourists were from the City of Cape Town and from the international sampled tourists, **542** were from the USA.





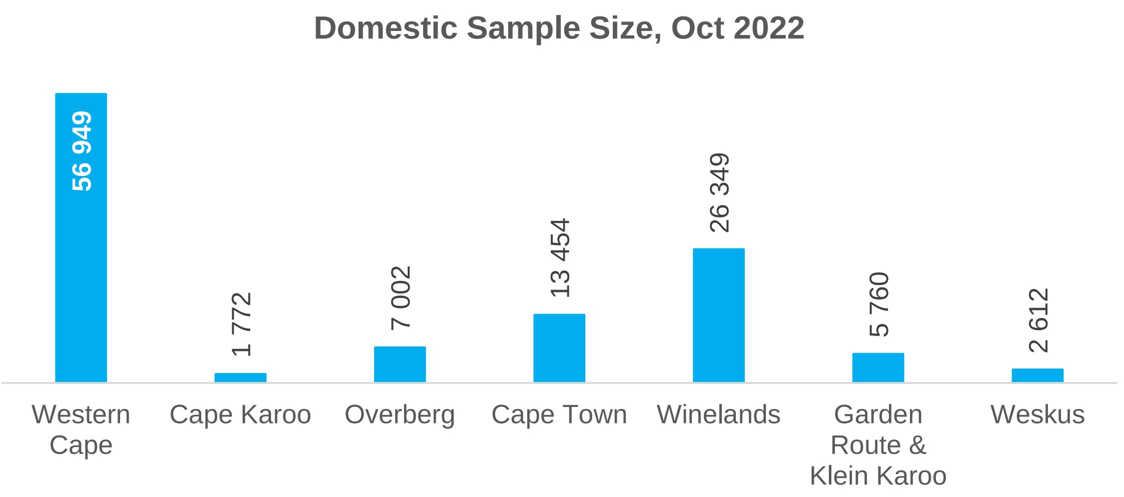


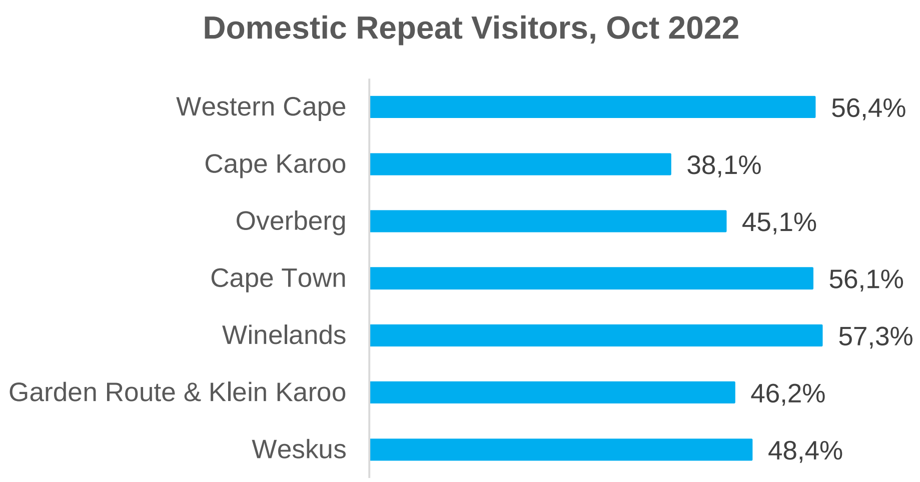
Source: Rove, 2022

10.1. Mobile Insights: Domestic Visitor Trends

- In October 2022, **Winelands (46.3%) and Cape Town (23.6%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (3.1%) had the least.

- **Winelands (57.3%)** was the most popular region for domestic repeat visits, followed by **Cape Town (56.1%)** and **Weskus (48.4%).**



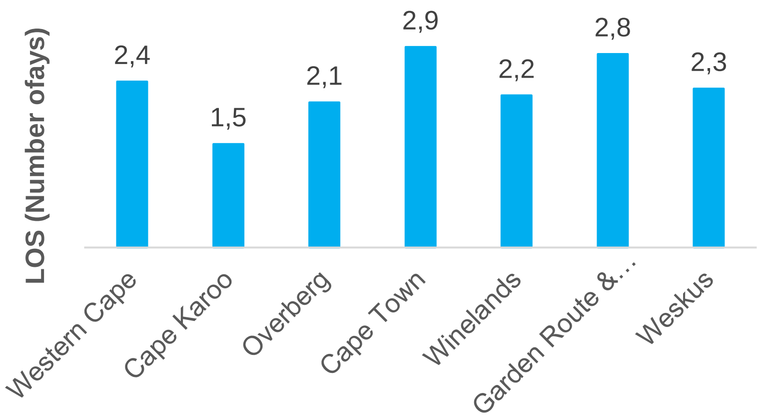


Source: Rove, 2022

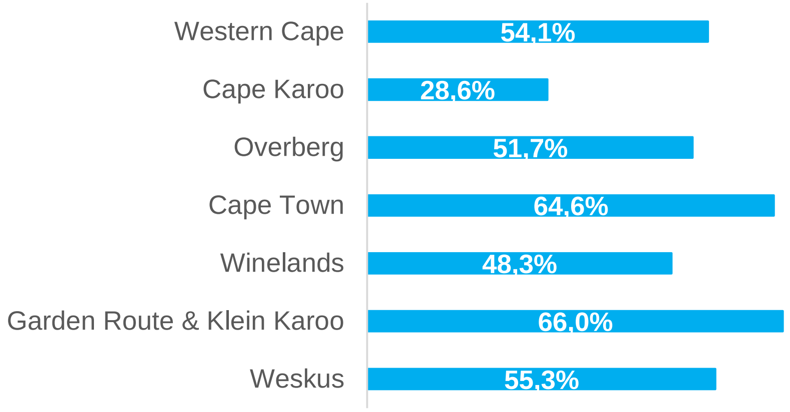
10.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent **the longest time in Cape Town (2.9 days) and the Garden Route & Klein Karoo (2.8 days)** during October 2022, and the shortest time in the Cape Karoo (1,5 days).
- **Over 60% of sampled tourists** stayed overnight in Cape Town and the Garden Route & Klein Karoo (respectively), and at a slightly higher rate than the general average for the province (54.1%).
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.

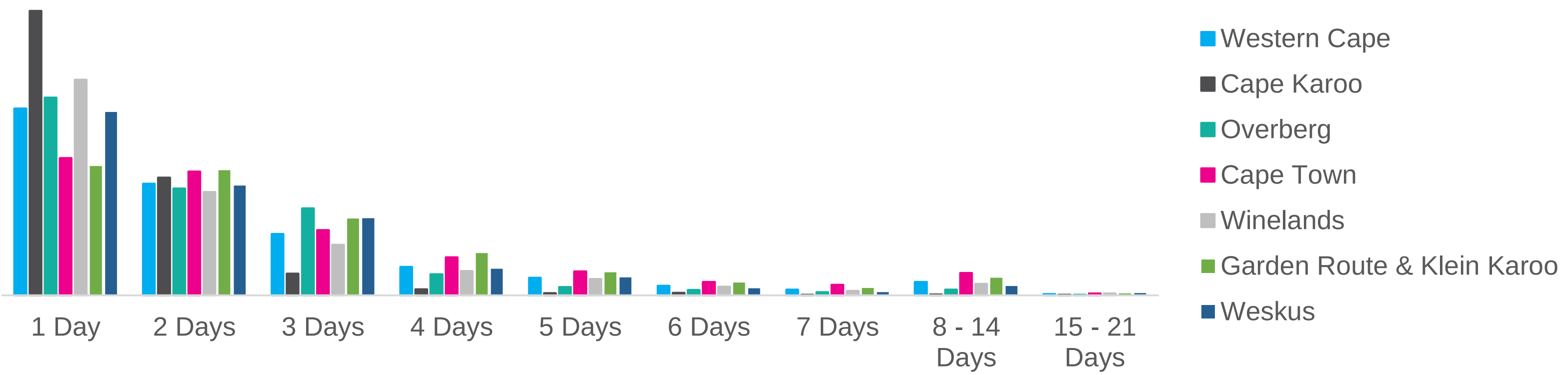
Average Length of Stay (LOS), Oct 2022



% Overnight Stays, Oct 2022



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

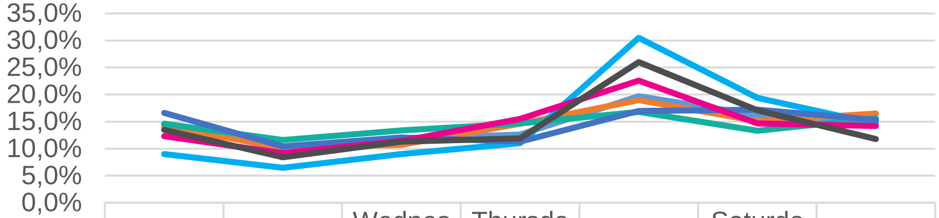


Source: Rove, 2022

10.1. Mobile Insights: Domestic Visitor Trends

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

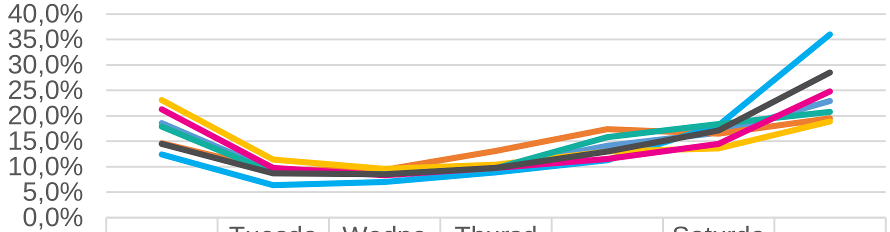
Popular Arrival Days of the Week: Domestic, Oct 2022



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	14,5%	10,0%	11,9%	12,6%	19,7%	16,2%	15,1%
Cape Karoo	14,1%	10,2%	10,7%	14,6%	19,0%	15,1%	16,5%
Overberg	9,0%	6,5%	9,0%	11,0%	30,5%	19,4%	14,6%
Cape Town	14,6%	11,6%	13,4%	14,7%	16,8%	13,3%	15,6%
Winelands	16,6%	10,4%	12,1%	11,3%	17,0%	17,2%	15,3%
Garden Route & Klein Karoo	12,3%	9,2%	11,4%	15,5%	22,6%	14,7%	14,2%
Weskus	13,5%	8,4%	11,3%	11,9%	26,0%	17,1%	11,8%

Source: Rove, 2022

Popular Departure Days of the Week: Domestic, Oct 2022



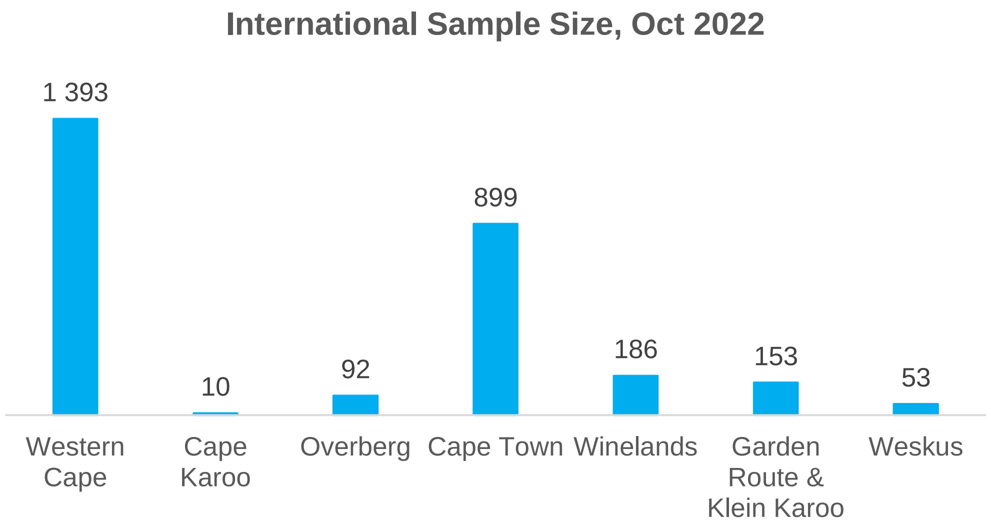
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	18,6%	9,2%	8,6%	9,9%	14,1%	16,7%	22,9%
Cape Karoo	14,6%	9,4%	9,4%	13,1%	17,4%	16,5%	19,5%
Overberg	12,4%	6,4%	7,0%	8,9%	11,3%	18,1%	36,0%
Cape Town	23,1%	11,4%	9,6%	10,4%	13,0%	13,6%	18,9%
Winelands	17,9%	8,8%	8,5%	9,7%	15,8%	18,4%	20,8%
Garden Route & Klein Karoo	21,3%	9,8%	8,3%	9,8%	11,5%	14,5%	24,8%
Weskus	14,5%	8,7%	8,5%	9,8%	13,0%	17,1%	28,5%

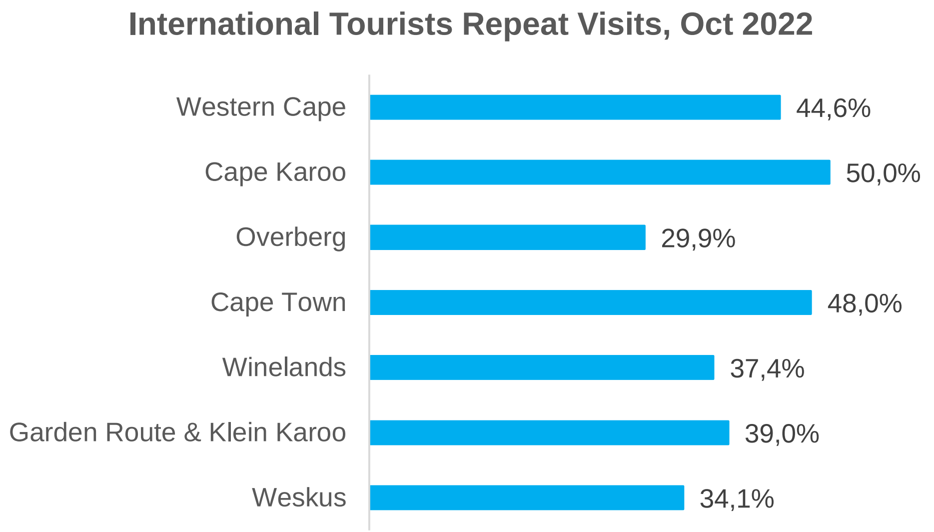
Source: Rove, 2022

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

10.2. Mobile Insights: International Visitor Trends

- **Close to 65%** of the sampled international tourists visited Cape Town followed by 13.4% who visited the Winelands.
- Visitor trends for the Cape Karoo is based on a sample size of only 10 international tourists and therefore does not provide an accurate statistical representation for the region.
- Cape Town, Garden Route & Klein Karoo and Winelands saw the most international repeat visitors in October 2022.

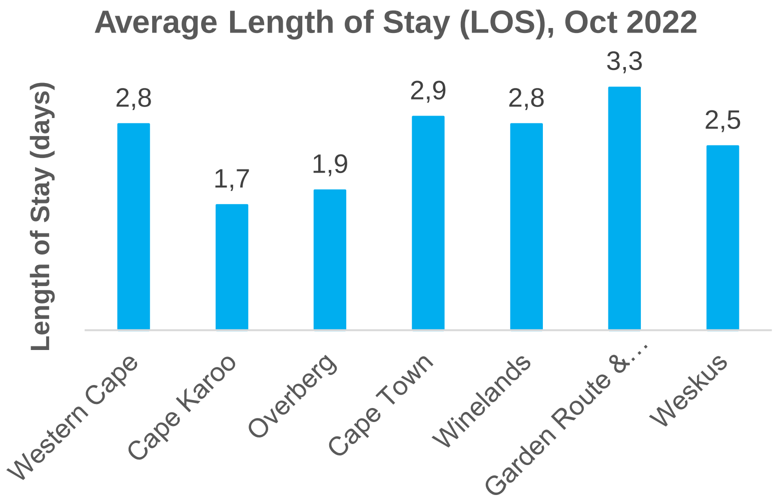


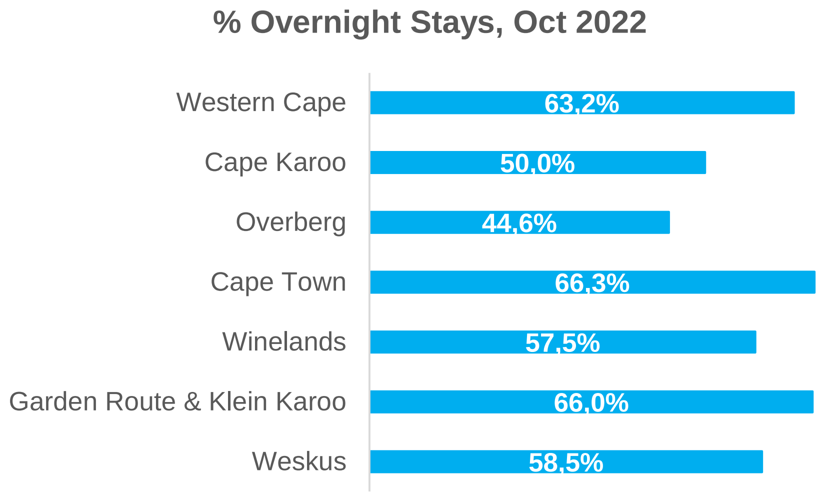


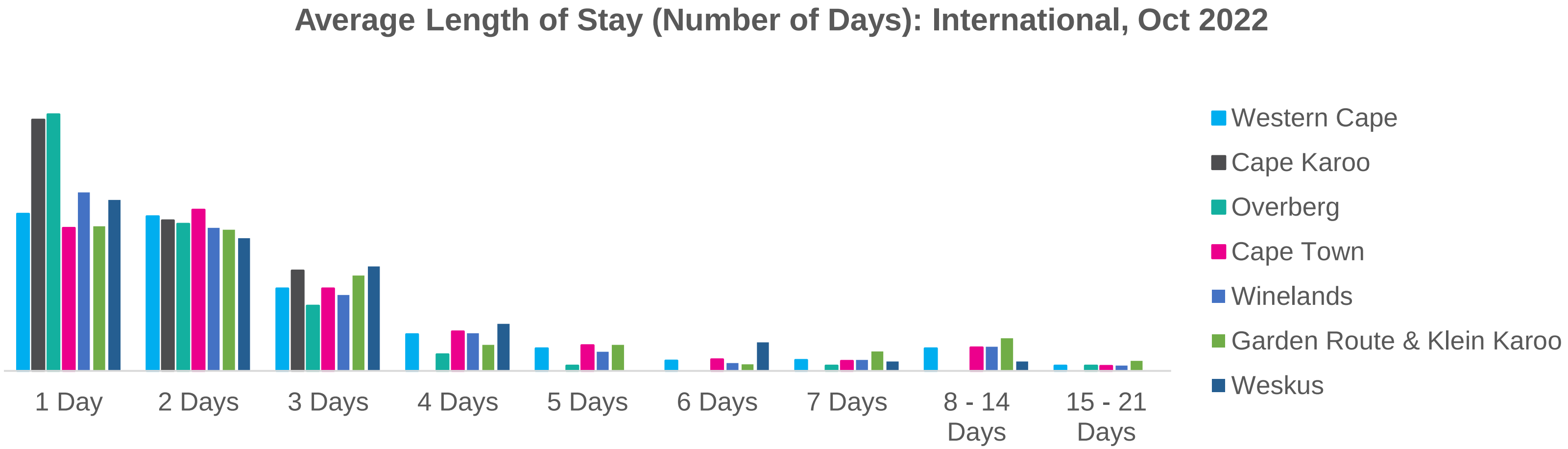
Source: Rove, 2022

10.2. Mobile Insights: International Visitor Trends

- International tourists spent the longest time in the Garden Route & Klein Karoo (3.3 days) and Cape Town (2.9 days).
- Nearly 70% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and Cape Town (respectively). Both regions recorded overnight stays which was slightly higher than the average for the province (63.2%).
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.





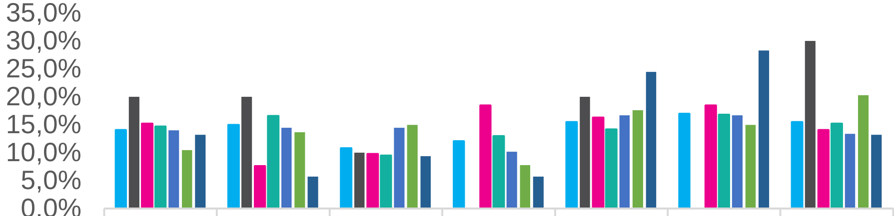


Source: Rove, 2022

10.2. Mobile Insights: International Visitor Trends

- During October 2022, international tourists to the province mainly arrived on a Saturday and departed on a Monday.
- In the Winelands, a Friday or Saturday was the most popular arrival days and Saturday the most common day for departures.
- International tourists to the Garden Route & Klein Karoo arrived mostly on a Sunday and departed on a Sunday or Monday.

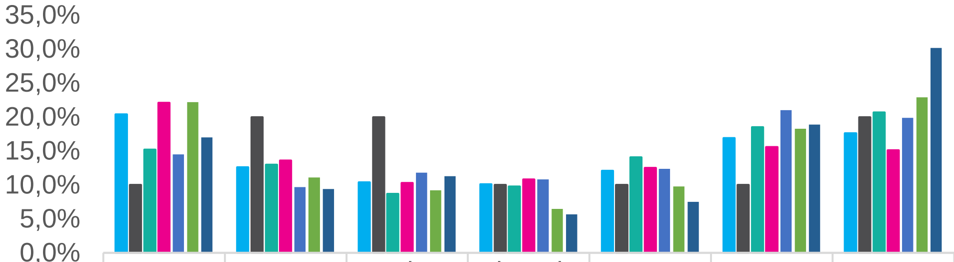
Popular Arrival Days of the Week: International, Oct 2022



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	14,1%	15,0%	10,8%	12,1%	15,5%	17,0%	15,5%
Cape Karoo	20,0%	20,0%	10,0%	0,0%	20,0%	0,0%	30,0%
Overberg	15,2%	7,6%	9,8%	18,5%	16,3%	18,5%	14,1%
Cape Town	14,7%	16,6%	9,5%	13,0%	14,2%	16,8%	15,2%
Winelands	14,0%	14,5%	14,5%	10,2%	16,7%	16,7%	13,4%
Garden Route & Klein Karoo	10,5%	13,7%	15,0%	7,8%	17,6%	15,0%	20,3%
Weskus	13,2%	5,7%	9,4%	5,7%	24,5%	28,3%	13,2%

Source: Rove, 2022

Popular Departure Days of the Week: International, Oct 2022



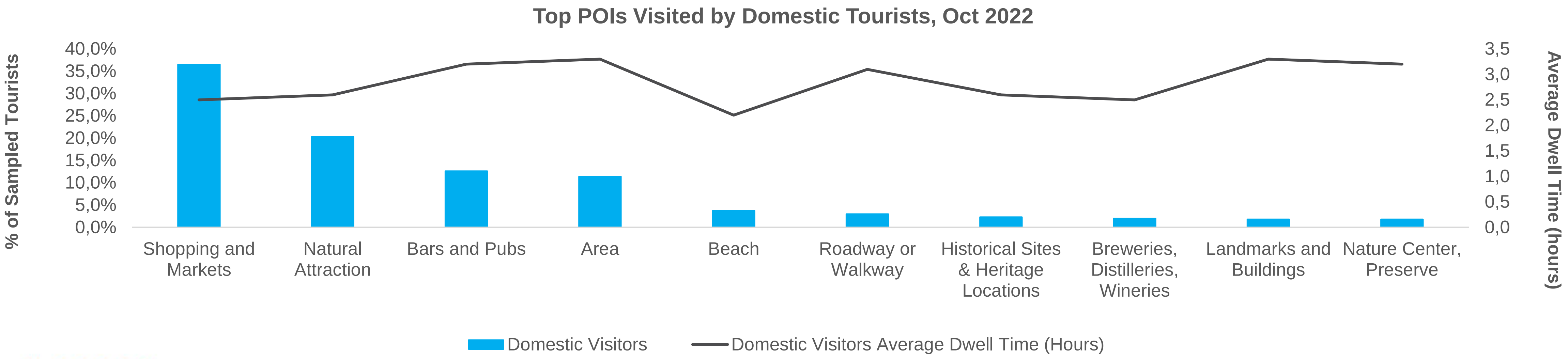
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	20,4%	12,6%	10,4%	10,1%	12,1%	16,9%	17,6%
Cape Karoo	10,0%	20,0%	20,0%	10,0%	10,0%	10,0%	20,0%
Overberg	15,2%	13,0%	8,7%	9,8%	14,1%	18,5%	20,7%
Cape Town	22,1%	13,6%	10,3%	10,8%	12,5%	15,6%	15,1%
Winelands	14,5%	9,7%	11,8%	10,8%	12,4%	21,0%	19,9%
Garden Route & Klein Karoo	22,2%	11,1%	9,2%	6,5%	9,8%	18,3%	22,9%
Weskus	17,0%	9,4%	11,3%	5,7%	7,5%	18,9%	30,2%

Source: Rove, 2022

- The sampled tourists (10) in the Cape Karoo, arrived on a Sunday and departed on either a Tuesday, Wednesday or Sunday.
- Cape Town arrival day was most common on a Saturday and departure was most popular on a Monday.
- Thursday or Saturday was the most popular arrival days in the Overberg and a Sunday the most common departure day.
- In the Weskus, Saturday was popular for arrival and departure most common on a Sunday.

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

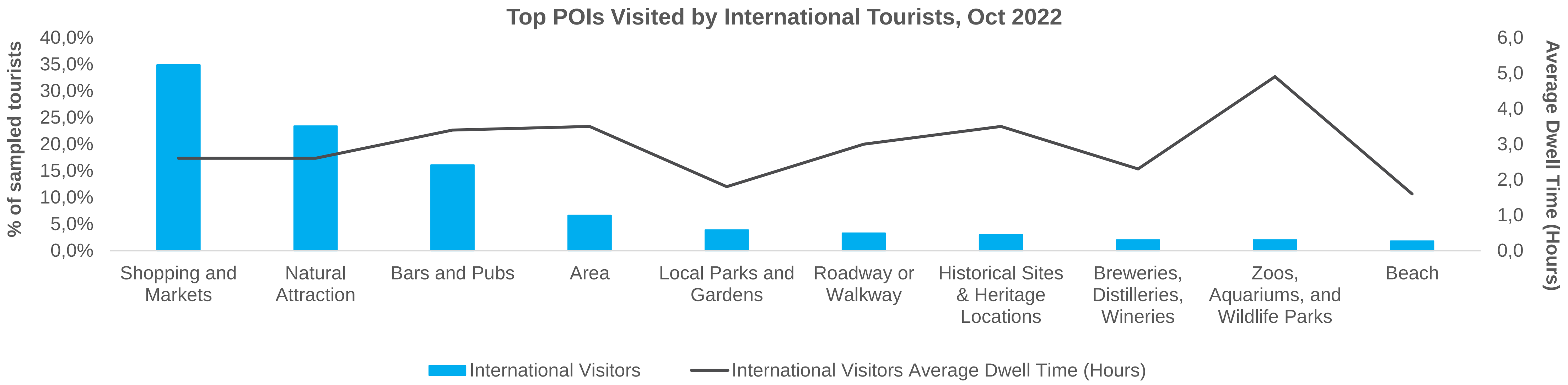
- Shopping and markets was the most popular type of attraction visited by domestic tourists with an average dwell time of 2.5 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront were popular among domestic tourists. On average, domestic visitors spent the longest time at Cape Point with a dwell time of 3.0 hours.
- Bars & Pubs in the city centre 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 among the top POIs visited by domestic tourists, with an average dwell time of 3.3 hours.
- While at a low base, a sample of 7 domestic tourists spent 5.6 hours at resorts and a sample of 34 visited zoos, aquariums and wildlife parks for an average of 4.0 hours.



Source: Rove, 2022

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 2.6 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront were among the top with international tourists.
- Areas such as Hemel-en-Aarde Valley, Cederberg Wilderness and Stanford Valley ranked fourth among the top POIs visited by international tourists, with an average dwell time of 3.5 hours.
- Bars & Pubs in the city centre were the third most popular point of interest 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 at zoos, aquariums and wildlife parks (4.9 hours).

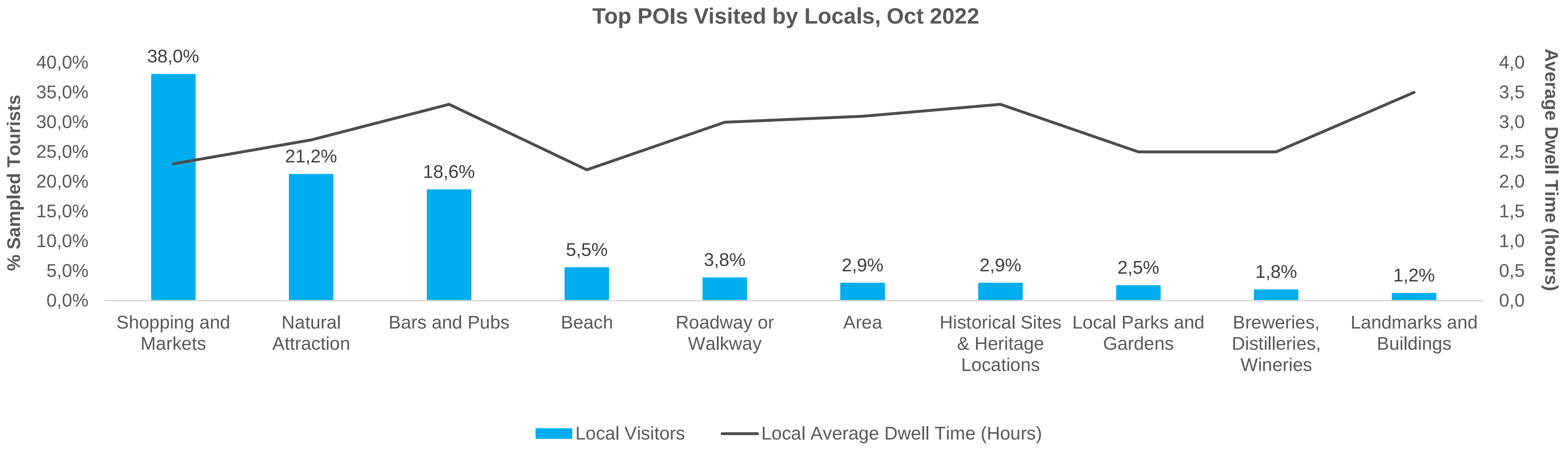


Source: Rove, 2022

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

- Similar to domestic tourist trends, shopping and markets, natural attractions and bars and pubs, ranked as the top three points of interests for local tourists. Locals spent on average 2.3 hours at shops and markets, 2.7 hours at natural attractions and 3.3 hours at bars and pubs.

- During October 2022, locals spent the longest time in a day trip at resorts with an average dwell time of 5.6 hours, however, this was based on a sample of 13 local tourists.

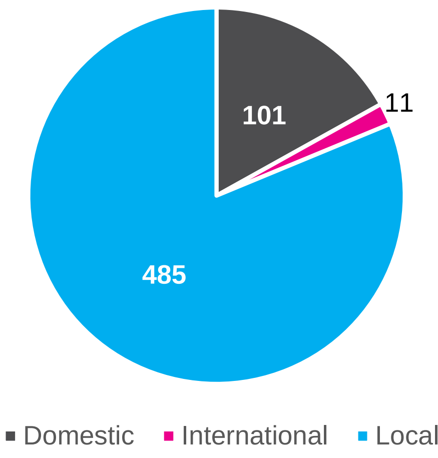


Source: Rove, 2022

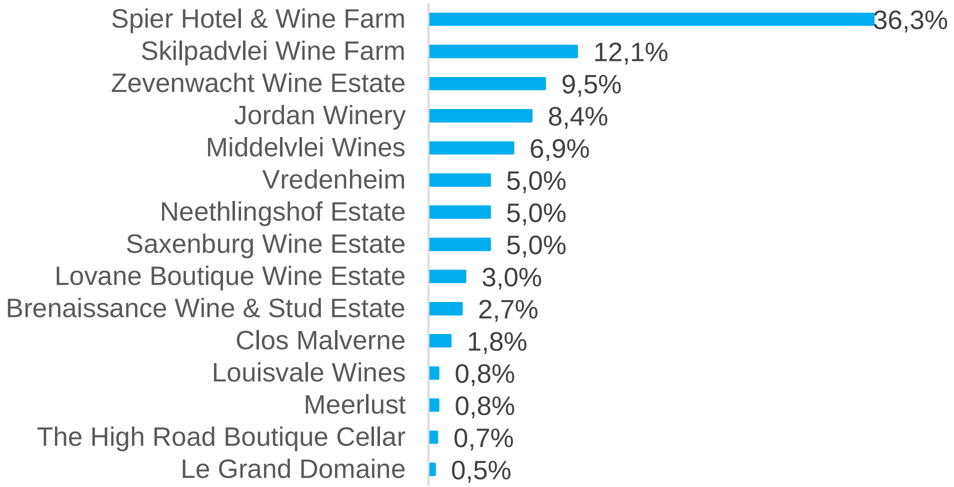
10.4. Stellenbosch Valley Wine Route

- From a sample size of **597 tourists** who visited the Stellenbosch Wine Route, 81% were locals, 17% domestic and 2% 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, Overgaauw (6.8 hours) and Boschkloof (6.7 hours) reflected the longest dwell time for October 2022.

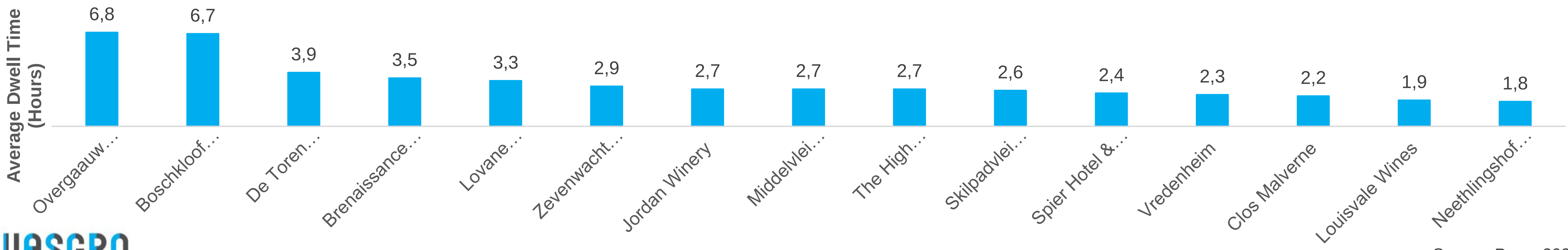
Sample Size: Visitors to Stellenbosch Wine Valley, Oct 2022



Stellenbosch Wine Valley Route: Top POIs Visited, Oct 2022



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



Source: Rove, 2022

Mobile Tourists and Non-Tourists Definitions

- About Mobile Location Data
    - Privacy compliant data is collected from location enabled apps on mobile devices. Data collected when those location enabled mobile devices entered our geo fenced area
    - Data is collected through applications (news, weather, games, texting apps, traffic, etc)
        - Year over year numbers could be skewed by increase app penetration and data privacy settings/policies.
        - Exception with China which does not share data…
    - Think of mobile data like survey data on steroids.
        - A sample size greater than 30 yields a 95% level of confidence.
        - This may be the largest sample size of data pertaining to visitors•
    - Should not be compared to visitation data.•
    - Many factors impact total sample size
        - Number of app partnerships
        - Usage of apps
        - App developer policies
        - Volume of visitors
- Who Are Tourists vs Non-Tourists?
    - A Tourist is typically defined as follows:
        - The visitor does not live or work within the study geography
        - The visitor travels a minimum distance to the study geography
        - The visitor appears in the study geography for a minimum period of time (exclude commuters/passers through etc.)

Source: Rove, 2022

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, 2022

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.

Source: Rove, 2022