



Tourism Research Overview December 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

- CTIA's international terminal saw a 17% year-on-year growth in December 2023, with over 317 000 two-way passengers. This is the highest monthly total in history, beating the previous high of 290 000 2-way passengers processed in January 2020.
- For the full year 2023, the international terminal registered a 48% growth in relation to 2022, with 2.8 million two-way passengers. This figure is yet again record-breaking, surpassing the previous benchmark of 2.6 million 2-way passengers recorded in 2019.
- The domestic terminal recorded an impressive 21% year-on-year growth for December 2023, with 688 000 2-way passengers. The total growth for 2023 has remained steady at 16%, when compared to the same period in 2022, reaching just under 6.9 million 2-way passengers for the year.
- George Airport's 2-way passenger numbers show a notable 31% year-on-year growth for December 2023, with over 83 000 2-way passengers travelling through the airport. The increase is partially due to subdued numbers recorded during December 2022, but indicates the positive recovery of domestic travel to the Garden Route & Klein Karoo region.
- For the full year January to December 2023, Cape Town and the Western Cape recorded a total of 914,971 tourist arrivals via air, of which 89% originated from overseas markets and 11% from the African continent. Both the overseas and Africa air markets remain at full recovery as at December 2023 vs. Jan – Dec 2019.
- Between January and December 2023, the UK led as the top air market to Cape Town, with the USA standing firm in second position, followed by Germany, the Netherlands and France in the top 5 positions. The European market continues to dominate as the largest contributor to air arrivals into Cape Town, with 6 out of the top 10 source markets originating from the continent.
- The cumulative total of tourists between January and December 2023 reflected full recovery from 8 out of the top 10 source markets to Cape Town (via air), against the same period in 2019 (Jan-Dec). These markets include the UK (103%), USA (146%), Germany (101%), Netherlands (113%), Italy (111%), Canada (106%), India (106%) and Zimbabwe (198%).
- 48 participating attractions across the six regions of the Western Cape recorded a total of 921,806 visitors in December 2023, nearly reaching the 1 million mark for the month of December 2023 alone. A 28% year-on-year growth in the number of visitors were recorded in December 2023 when compared to December 2022.
- The top 5 highest year-on-year growth rates in December 2023 were recorded for Stony Point Eco Venue (554%), Agulhas National Park (254%), Gamkaberg Nature Reserve (240%), Kogelberg Nature Reserve (130%) and Table Mountain National Park (98%).

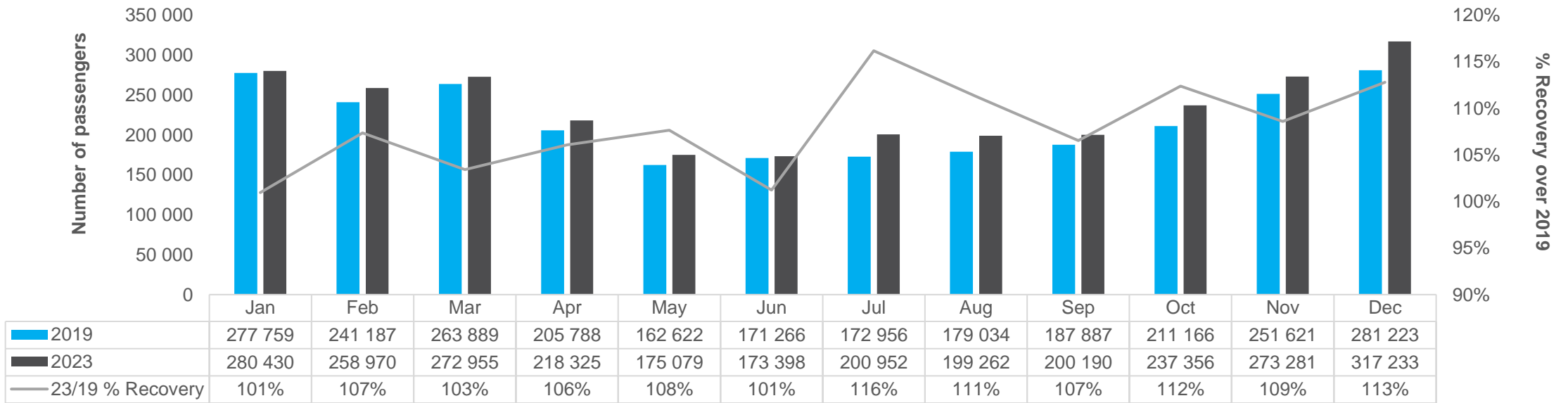
International two-way passengers at CTIA reached 2.8 million between Jan and Dec 2023 and grew by 48% year-on-year

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 | 2023 | | | | | |
|------------------------|-----------|---------|---------|-----------|-----------|---------|---------|---------|---------|---------|---------|
| | | | | | | Jul | Aug | Sept | Oct | Nov | Dec |
| Two-way passengers | 2 606 398 | 810 811 | 525 441 | 1 895 975 | 2 807 431 | 200 952 | 199 262 | 200 190 | 237 356 | 273 281 | 317 233 |
| YoY growth percentage* | 1% | -69% | -35% | 261% | 48% | 34% | 34% | 31% | 35% | 29% | 17% |

* Growth compared to the same period in the previous year

Source: ACSA, 2024

International two-way passenger recovery, Jan-Dec 2019/2023



Source: ACSA, 2024

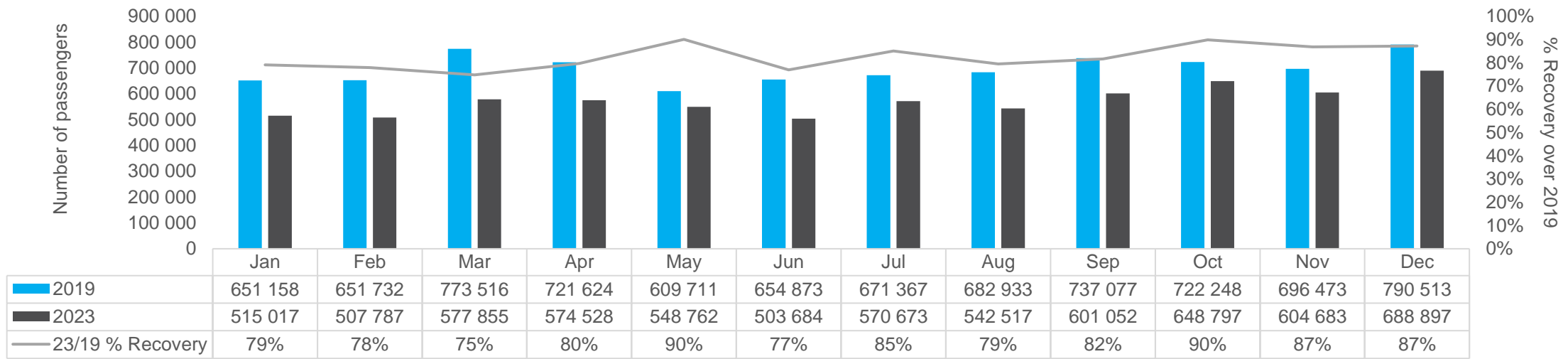
Domestic two-way passengers at CTIA reached 6.8 million between Jan and Dec 2023 and grew by 16% year-on-year

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 | 2023 | | | | | |
|------------------------|-----------|-----------|-----------|-----------|-----------|---------|---------|---------|---------|---------|---------|
| | | | | | | Jul | Aug | Sept | Oct | Nov | Dec |
| Two-way passengers | 8 363 307 | 3 167 542 | 4 221 365 | 5 960 826 | 6 884 252 | 570 673 | 542 517 | 601 052 | 648 797 | 604 683 | 688 897 |
| YoY growth percentage* | 2% | -62% | 33% | 41% | 16% | 25% | 18% | 24% | 23% | 19% | 21% |

* Growth compared to the same period in the previous year

Source: ACSA, 2024

Domestic two-way passenger recovery, Jan-Dec 2019/2023



Source: ACSA, 2024

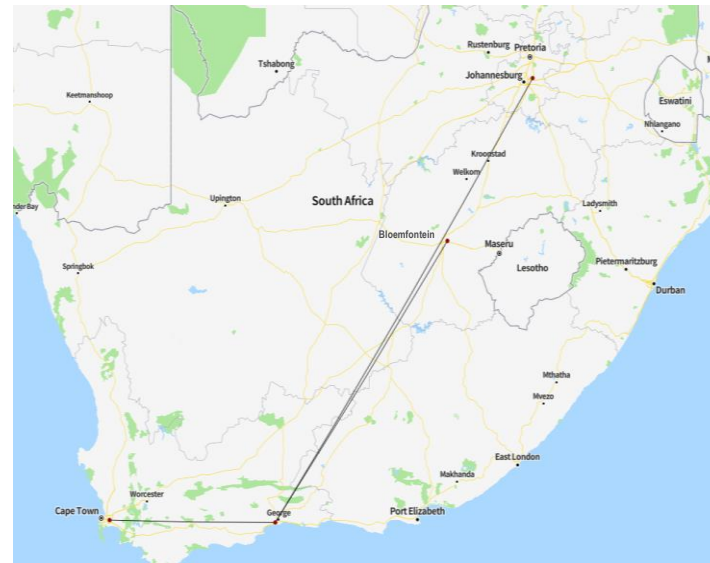
George Airport's two-way passengers reached 792,735 between Jan and Dec 2023, a 6% increase vs. Jan - Dec 2022

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 | 2023 | | | | | |
|------------------------|---------|---------|---------|---------|---------|--------|--------|--------|--------|--------|--------|
| | | | | | | Jul | Aug | Sept | Oct | Nov | Dec |
| Two-way passengers | 840 804 | 346 223 | 539 637 | 747 848 | 792 735 | 64 346 | 62 082 | 64 428 | 68 850 | 63 828 | 83 710 |
| YoY growth percentage* | 0.5% | -59% | 56% | 39% | 6% | 2% | 2% | 5% | 7% | 7% | 31% |

* Growth compared to the same period in the previous year

Source: ACSA, 2024

Operating carriers



Source: OAG Schedules Analyser

CPT International schedule




IATA Winter 2023/24 (Nov – Mar)

25 airlines
30 destinations
36 routes
215 flights per week

Rest of Africa

| | | |
|------------------------------------------------------------------------------------|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Air Botswana | Gaborone (GBE) 3x per week |
|  | Air Mauritius | Mauritius (MRU) 2x week* <i>*3x per week from 01 Dec – 02 April</i> |
|  | Airlink | Windhoek (WDH) 2x a day Walvis Bay (WVB) Daily Harare (HRE) Daily Victoria Falls (VFA) 6x week Maun (MUB) Daily Maputo (MPM) 4x week |
|  | Eswatini Air | Manzini (SHO) 3x week |
|  | Ethiopian Airlines | Addis Ababa (ADD) 11x per week |
|  | FlyNamibia | Windhoek (WDH) 6x per week Walvis Bay (WVB) 4x per week |
|  | Kenya Airways | Nairobi (NBO) 3x week, NBO – Livingstone (LVI) 2x week NBO – Victoria Falls (VFA) 3x week |
|  | Proflight Zambia | Lusaka (LUN) 2x week <i>*3x per week from 1st week of Feb 2024</i> |
|  | RwandAir | Kigali (KGL) - Harare (HRE) 6x week |
|  | TAAG | Luanda (LAD) Daily |
|  | LAM Mozambique | Maputo (MPM) 3x week |




Asia & Middle East

| | | |
|-------------------------------------------------------------------------------------|---------------------------|---------------------------------------------------------|
|  | Emirates | Dubai (DXB) 2x Daily |
|  | Qatar Airways | Doha (DOH) 2x Daily |
|  | Singapore Airlines | Singapore (SIN)* Daily <i>*SIN-JNB-CPT-JNB-SIN</i> |

Europe

| | | |
|-------------------------------------------------------------------------------------|-------------------------|-----------------------------------------------------------------------------------------------|
|  | Air France | Paris (CDG)* 3x per week** <i>*Seasonal</i> <i>**5x per week from 17 Jan – 27 Feb</i> |
|  | British Airways | London Heathrow (LHR) 2x Daily London Gatwick (LGW)* 3x per week <i>*Seasonal</i> |
|  | Condor | Frankfurt (FRA)* 5x per week <i>*Seasonal</i> |
|  | Edelweiss | Zurich (ZRH)* 4x per week <i>*Seasonal</i> |
|  | KLM | Amsterdam (AMS) Daily |
|  | Lufthansa | Frankfurt (FRA) Daily Munich (MUC)* 5x per week <i>*Seasonal</i> |
|  | Turkish Airlines | Istanbul (IST) Daily |
|  | Virgin Atlantic | London Heathrow (LHR)* Daily <i>*Seasonal</i> |

North & South America

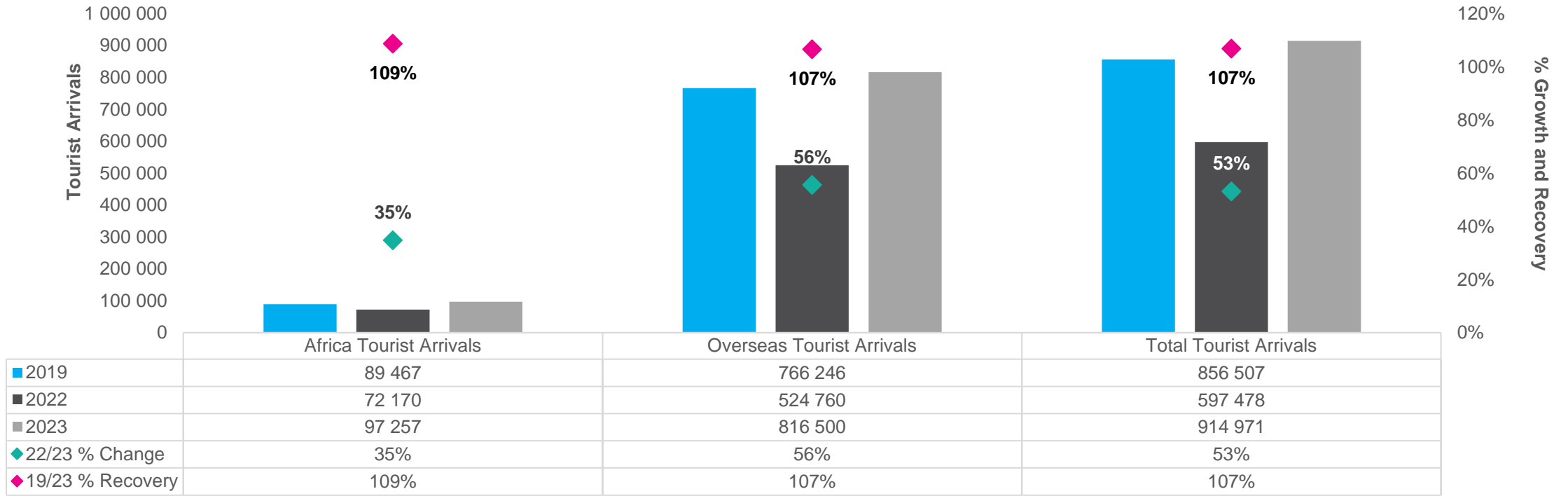
| | | |
|---------------------------------------------------------------------------------------|------------------------------|-------------------------------------------------------------------------------------|
|  | Delta Air Lines | Atlanta (ATL) 3x per week Triangular* 4x per week <i>*ATL-JNB-CPT-ATL</i> |
|  | United Airlines | Newark (EWR) 3x per week Washington D.C (IAD) 3x per week |
|  | South African Airways | São Paulo (GRU) 2x per week |

Source: Cape Town Air Access, 2024

Performance of Air Arrivals to Cape Town: Jan - Dec 2023

For the full year (January to December) 2023, Cape Town and the Western Cape recorded a total of **914,971** tourist arrivals via air, of which 89% originated from overseas markets and 11% from the African continent. Both the overseas and Africa air markets remain at **full recovery** as at December 2023 vs. Jan – Dec 2019.

TOURIST ARRIVALS TO CAPE TOWN (VIA AIR) BY ORIGIN, JAN – DEC 2023

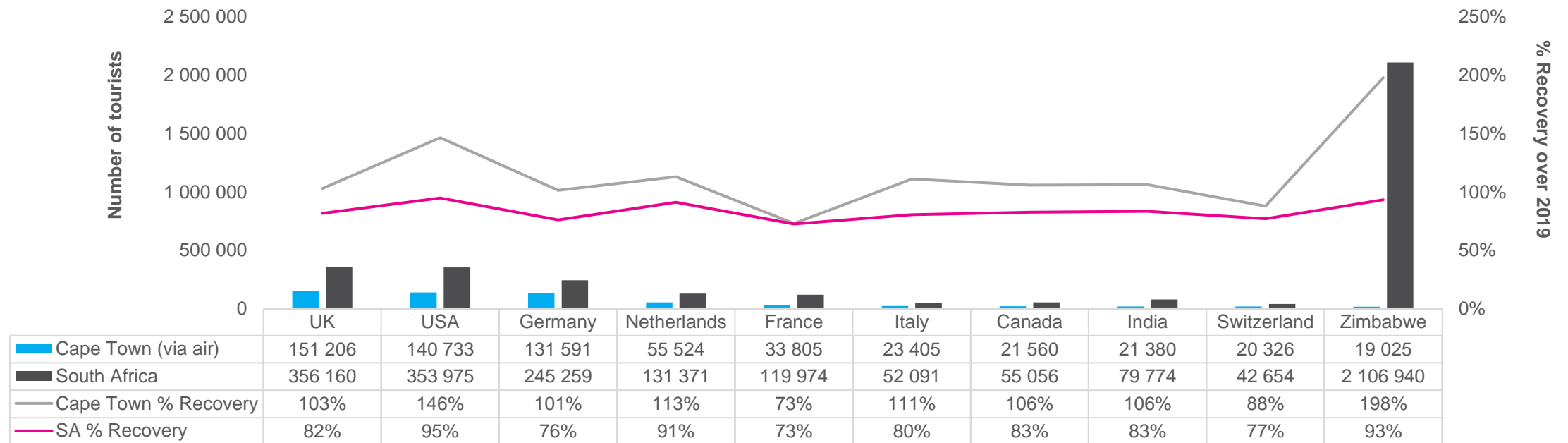


Source: StatsSA, 2024

Top Markets to Cape Town (via air): Jan - Dec 2023

- Between January and December 2023, the UK led as the top air market to Cape Town, with the USA standing firm in second position, followed by Germany, the Netherlands and France in the top 5 positions. The European market continues to dominate as the largest contributor to air arrivals into Cape Town, with 6 out of the top 10 source markets originating from the continent.
- The cumulative total of tourists between January and December 2023 reflected full recovery from 8 out of the top 10 source markets to Cape Town (via air), against the same period in 2019 (Jan - Dec). These markets include the UK (103%), USA (146%), Germany (101%), Netherlands (113%), Italy (111%), Canada (106%), India (106%) and Zimbabwe (198%).

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



Source: StatsSA, 2024

Performance of Western Cape Attractions: December 2023

| Western Cape Attractions | Dec-22 | Dec-23 | Dec 22/23 % Change |
|-------------------------------------------------|---------|---------|--------------------|
| Cape Town | | | |
| Kirstenbosch National Botanical Garden | 79 572 | 83 923 | 5% |
| Table Mountain Aerial Cableway | 109 057 | 106 959 | -2% |
| Table Mountain National Park | 162 661 | 322 146 | 98% |
| Table Mountain National Park: Boulders | 74 799 | 91 210 | 22% |
| Table Mountain National Park: Cape of Good Hope | 99 073 | 97 749 | -1% |
| Robben Island | 33 702 | 34 633 | 3% |
| Overberg | | | |
| Agulhas National Park | 4 476 | 15 845 | 254% |
| Bontebok National Park | 2 190 | 2 199 | 0% |
| Cape Agulhas Lighthouse | 3 809 | 4 004 | 5% |
| Harold Porter National Botanical Garden | 7 150 | 8 413 | 18% |
| Shipwreck Museum | 497 | 454 | -9% |
| Arniston Hotel & Spa | 3 638 | 3 709 | 2% |
| Elim Heritage Centre | 100 | 20 | -80% |
| Panthera Africa | 486 | 361 | -26% |
| Grootvadersbosch Nature Reserve | 1 043 | 1 459 | 40% |
| Marloth Nature Reserve | 811 | 1 033 | 27% |
| The Whale Trail | 372 | 354 | -5% |
| Walker Bay Nature Reserve | 3 659 | 7 103 | 94% |
| Stony Point Eco Venue | 13 | 85 | 554% |
| Grootvadersbosch Eco Venue | 85 | 128 | 51% |
| De Hoop Nature Reserve | 1 941 | 3 186 | 64% |
| De Mond Nature Reserve | 1 254 | 99 | -92% |
| Kogelberg Nature Reserve | 757 | 1 742 | 130% |
| Garden Route & Klein Karoo | | | |
| Tsitsikamma National Park | 32 445 | 37 288 | 15% |
| Wilderness National Park | 18 512 | 19 358 | 5% |
| Knysna National Park | 5 728 | 6 300 | 10% |
| Goukamma Nature Reserve | 506 | 120 | -76% |
| Keurbooms River Nature Reserve | 13 142 | 1 808 | -86% |
| Robberg Nature Reserve | 12 351 | 14 194 | 15% |

- 48 participating attractions across the six regions of the Western Cape recorded a total of **921,806** visitors in December 2023, a **28% growth in the number of visitors** when compared to December 2022.

- The top 5 highest year-on-year growth rates in December 2023 were recorded for:

- Stony Point Eco Venue (554%)
- Agulhas National Park (254%)
- Gamkaberg Nature Reserve (240%)
- Kogelberg Nature Reserve (130%)
- Table Mountain National Park (98%)

| Weskus | | | |
|-----------------------------------|----------------|----------------|------------|
| West Coast National Park | 23 158 | 30 564 | 32% |
| !Khwa ttu | 2 032 | 2 111 | 4% |
| Bird Island Nature Reserve | 2 366 | 2 153 | -9% |
| Cederberg-Algeria Nature Reserve | 2 489 | 1 707 | -31% |
| Cederberg-Kliphuis Nature Reserve | 188 | 233 | 24% |
| Groot Winterhoek Wilderness Area | 421 | 490 | 16% |
| Matjiesrivier Nature Reserve | 746 | 508 | -32% |
| Rocherpan Nature Reserve | 230 | 292 | 27% |
| Winelands | | | |
| Protea Tractor Trip | 1 095 | 765 | -30% |
| Birds Paradise | 1 277 | 1 276 | 0% |
| Viljoensdrift River Cruise | 3 717 | 3 773 | 2% |
| Assegaaibosch Nature Reserve | 642 | 987 | 54% |
| Hottentots Holland Nature Reserve | 363 | 506 | 39% |
| Limietberg Nature Reserve | 4 083 | 5 122 | 25% |
| Vrolijkheid Nature Reserve | 641 | 583 | -9% |
| Cape Karoo | | | |
| Karoo National Park | 5068 | 4535 | -11% |
| Anysberg Nature Reserve | 73 | 125 | 71% |
| Gamkaberg Nature Reserve | 55 | 187 | 240% |
| Swartberg Nature Reserve | 10 | 7 | -30% |
| Total | 722 483 | 921 806 | 28% |

Sources: LTO's, and Attractions, 2024

Visitor Trends Mobile Location Data Insights

December 2023

Western Cape Mobile Location Data Insights

What is mobile location data?

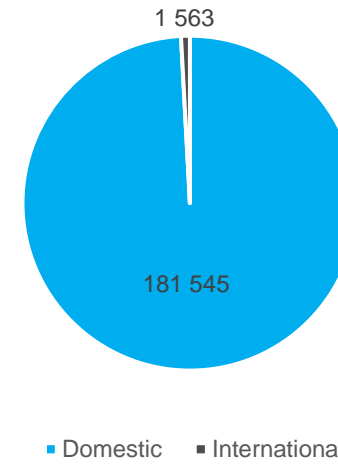
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they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

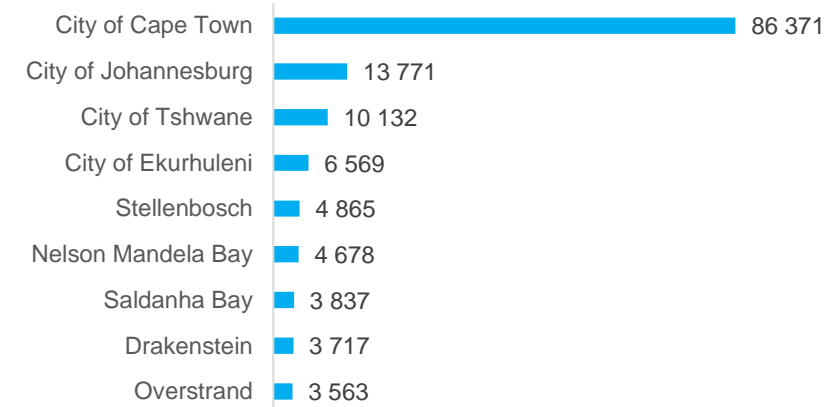
- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six region.
- Mobile location data serves as a sample. It is not 100% of visitors, 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 **181,545 domestic** and **1,563 international** tourists who visited the Western Cape in December 2023. Within the domestic data set, **86,371** of the sampled tourists were from Cape Town, and the international sampled tourists, **368** were from the United States.

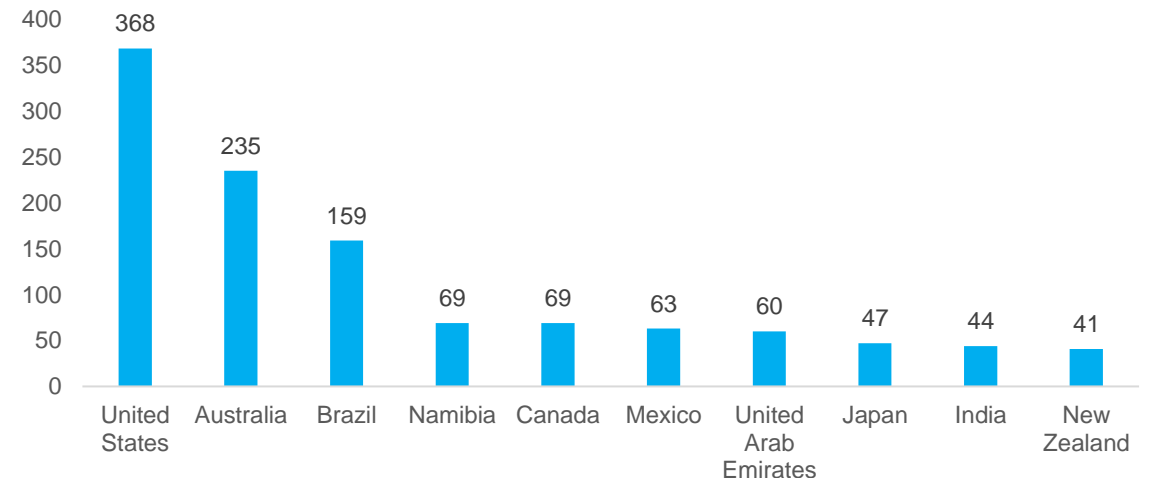
Sample Size, Dec. 2023



Domestic Origin Municipality, Dec. 2023



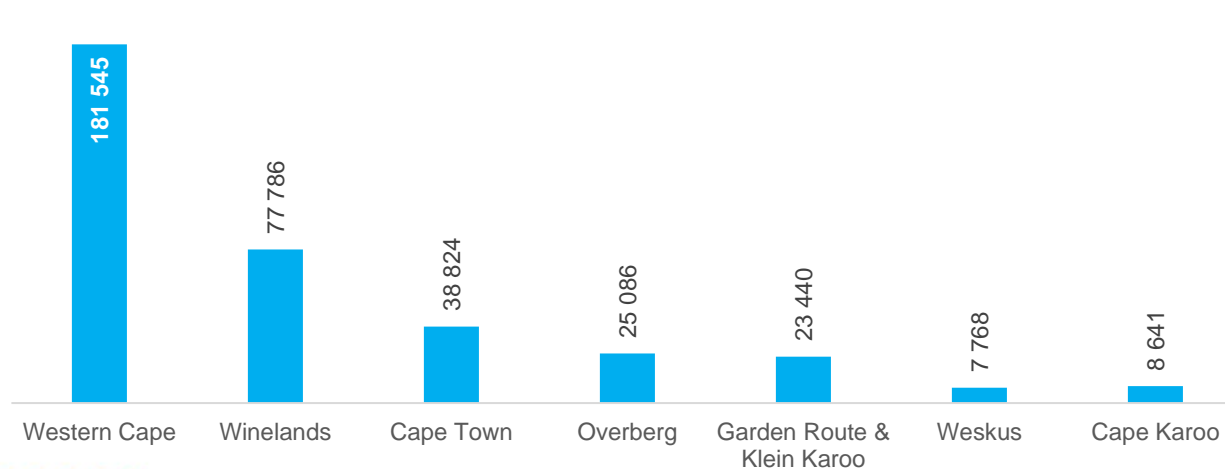
International Origin Country, Dec. 2023



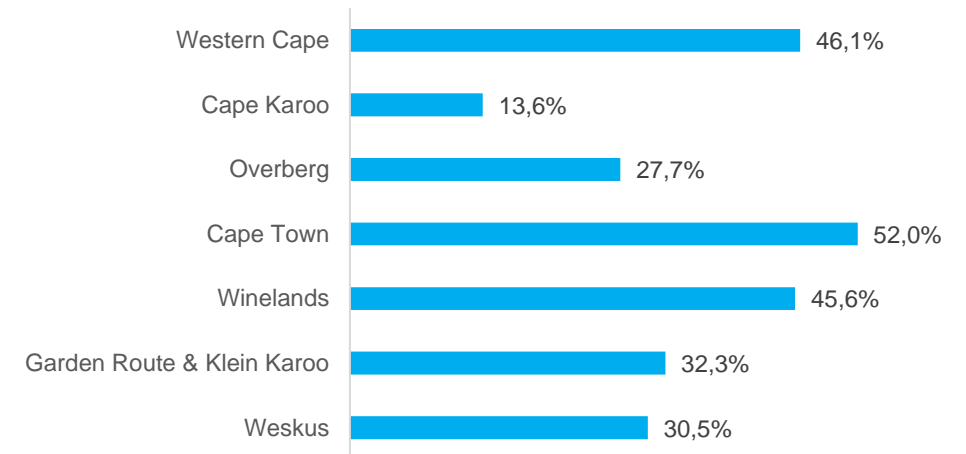
Mobile Insights: Domestic Visitor Trends

- According to the latest available mobile data insights, in the month of December 2023, the Western Cape region of South Africa saw a significant influx of repeat tourists, with an average of 46.1% of visitors returning for another visit.
- Among the top destinations within the region, the Winelands and Cape Town stood out as the most popular destinations for domestic tourists in terms of the volume of samples collected, with 42.8% and 21.4% of visitors respectively. Meanwhile, the Weskus region had the least sample size of tourists, with only 4.3% of visitors recorded during December 2023.
- Further analysis of the mobile data insights reveals that domestic tourists tended to favor certain regions for repeat visits during the December 2023 period. Cape Town emerged as the most popular region for domestic repeat visits, with 52% of visitors choosing to return to the city during this time.
- The Winelands proved to be the second most popular destination for repeat visits, with 45.6% of tourists choosing to return. The Garden Route & Klein Karoo (32.3%) and Weskus (30.5%) regions also proved to be popular among domestic tourists for repeat visits during December 2023.

Domestic Sample Size, Dec. 2023



Domestic Repeat Visitors, Dec. 2023

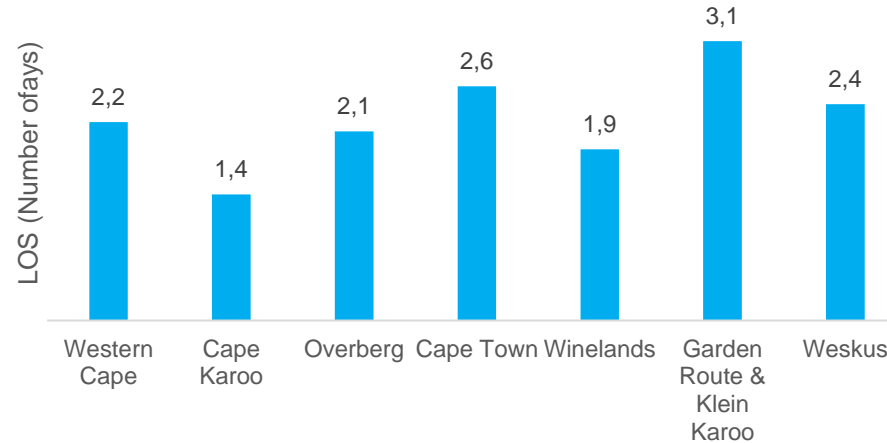


Source: Rove, 2024

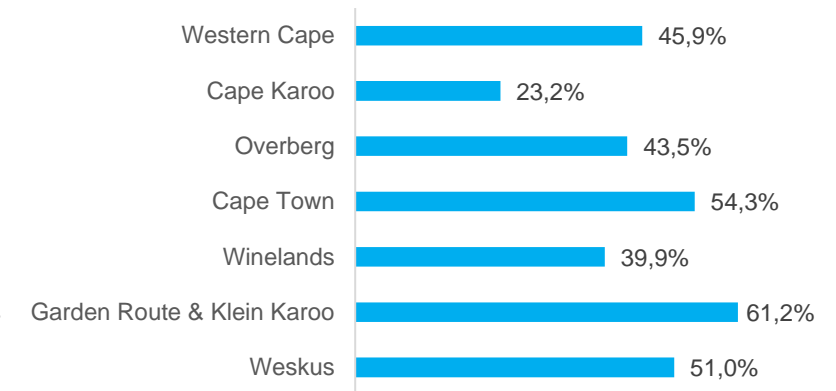
Mobile Insights: Domestic Visitor Trends

- According to the latest mobile data insights, domestic tourists who visit South Africa tend to spend the longest time in some of the most popular tourist destinations. The top five destinations in terms of length of stay are the Garden Route & Klein Karoo (3.1 days), Cape Town (2.6 days), Weskus (2.4 days), Overberg (2.1 days), and Winelands (1.9 days).
- Interestingly, the mobile data insights also reveal that more than 60% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo, while 54.3% choose Cape Town as their preferred destination for an overnight stay.
- On the other hand, the mobile data insights also show that only 72.1% of domestic tourists tend to visit Cape Karoo for just one day.

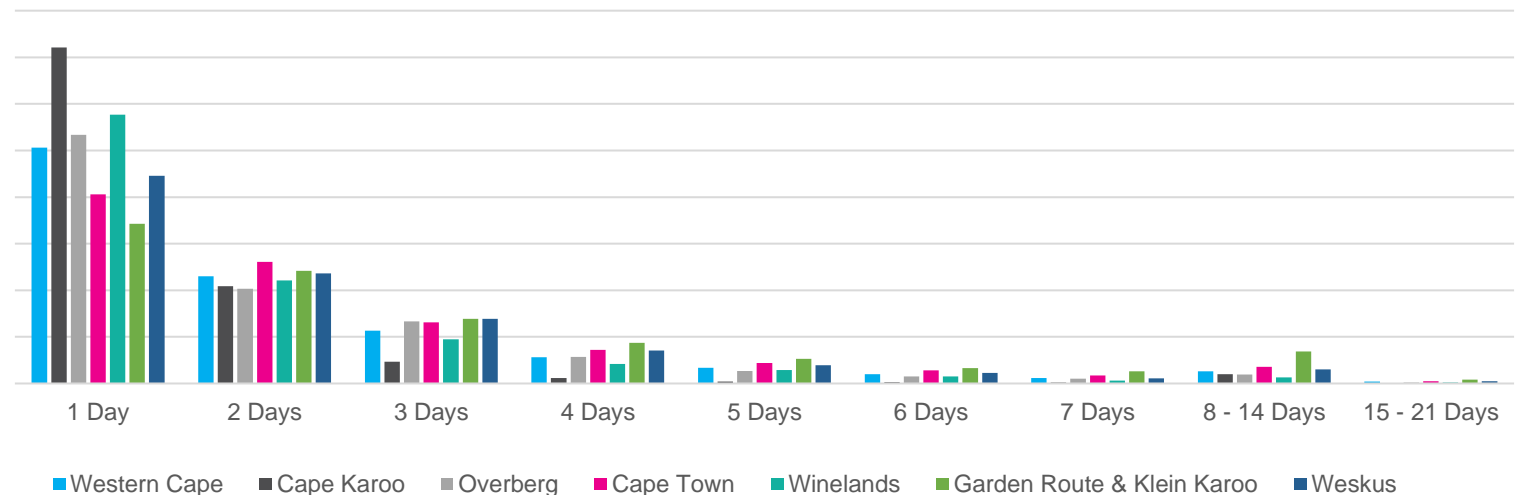
Average Length of Stay (LOS), Dec. 2023



% Overnight Stays, Dec. 2023



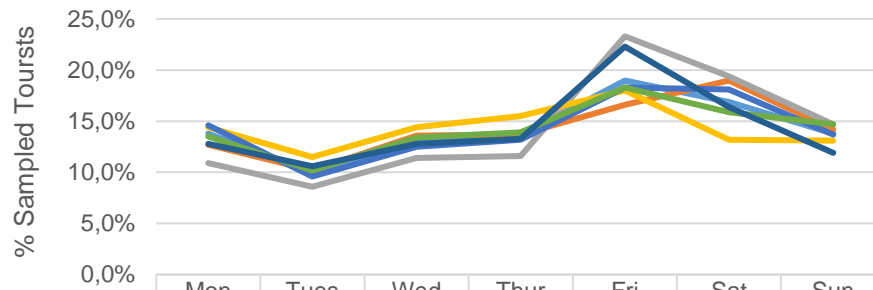
Average Length of Stay (Number of Days): Domestic, Dec 2023



Mobile Insights: Domestic Visitor Trends

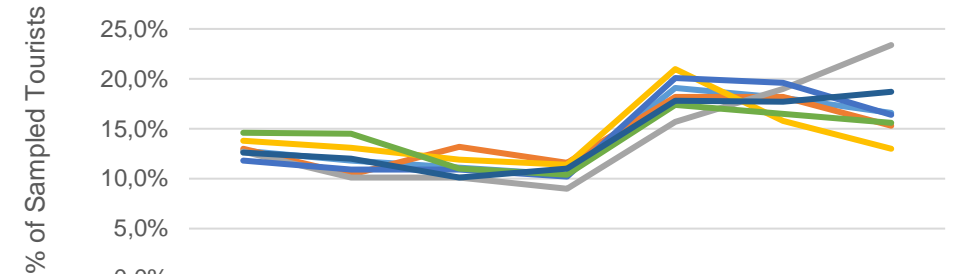
- According to the mobile data insights, it has been observed that domestic tourists who visited the Western Cape region arrived on a Friday and departed either on a Friday or Saturday.
- This trend seems to be prevalent in various regions of the Western Cape such as Overberg, Cape Town, Winelands, Garden Route, and Klein Karoo, as well as Weskus. It is quite evident that weekend stays are quite popular among the tourists visiting these regions of the province.
- Furthermore, it has been noted that the most preferred day for arrival in the Cape Karoo region was Friday, and Saturday was observed to be the most popular day of departure among tourists.

Popular Arrival Days of the Week: Domestic, Dec. 2023



| | | | | | | | |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|
| Western Cape | 13,8% | 10,0% | 13,0% | 13,6% | 19,0% | 16,9% | 13,8% |
| Cape Karoo | 12,7% | 10,2% | 13,6% | 13,7% | 16,6% | 19,0% | 14,2% |
| Overberg | 10,9% | 8,6% | 11,4% | 11,6% | 23,3% | 19,4% | 14,7% |
| Cape Town | 14,4% | 11,5% | 14,4% | 15,5% | 18,0% | 13,2% | 13,1% |
| Winelands | 14,6% | 9,6% | 12,5% | 13,2% | 18,3% | 18,1% | 13,7% |
| Garden Route & Klein Karoo | 13,5% | 10,2% | 13,4% | 13,9% | 18,3% | 15,9% | 14,7% |
| Weskus | 12,8% | 10,6% | 12,8% | 13,3% | 22,3% | 16,4% | 11,9% |

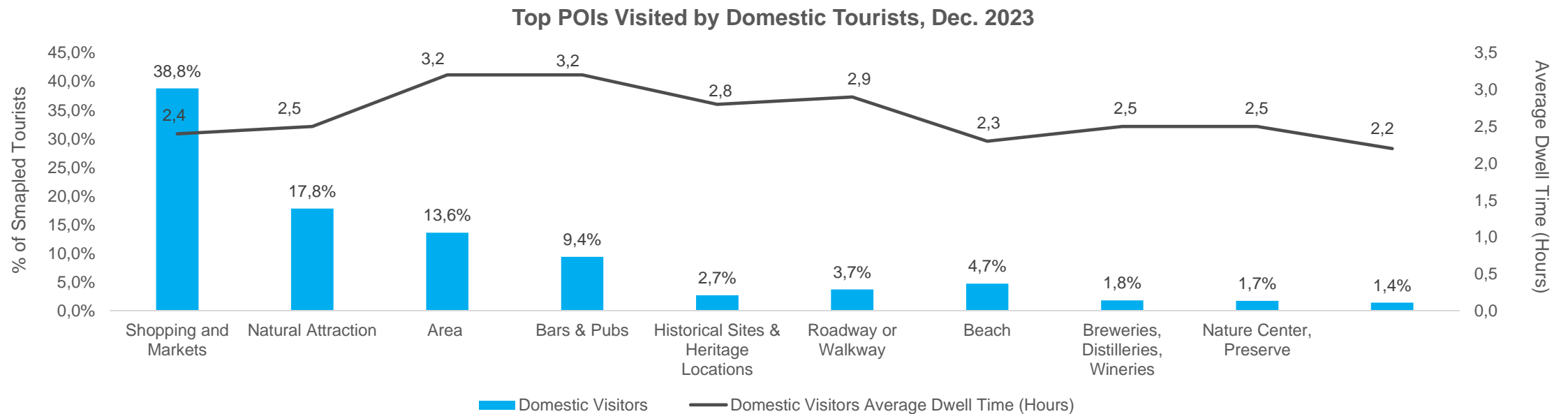
Popular Departure Days of the Week: Domestic, Dec. 2023



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

Points of Interest (POIs) Visited: Domestic Tourists

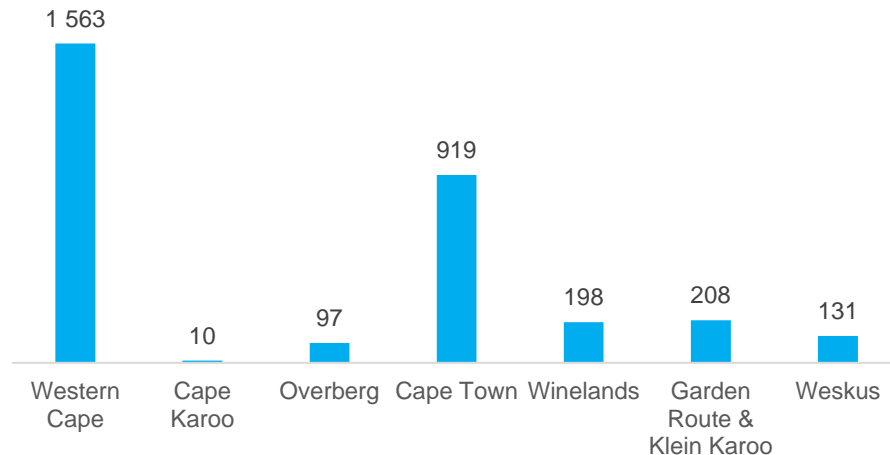
- **Shopping and markets** were the most popular type of attraction visited by domestic tourists with an average dwell time of **2.4 hours**.
- **Natural attractions** ranked as the 2nd most popular point of interest among domestic tourists with an average dwell time of **2.5 hours**.
- **Spending time in areas** like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked 3rd amongst the top POIs visited by domestic tourists, with an average dwell time of **3.2 hours**.
- **Bars and pubs** were the 4th most popular point of interest and domestic tourists spent an average of **3.2 hours** at the location.
- **Historical sites and heritage locations** ranked the 5th most popular point of interest among domestic tourists, with an average dwell time of **2.8 hours**.



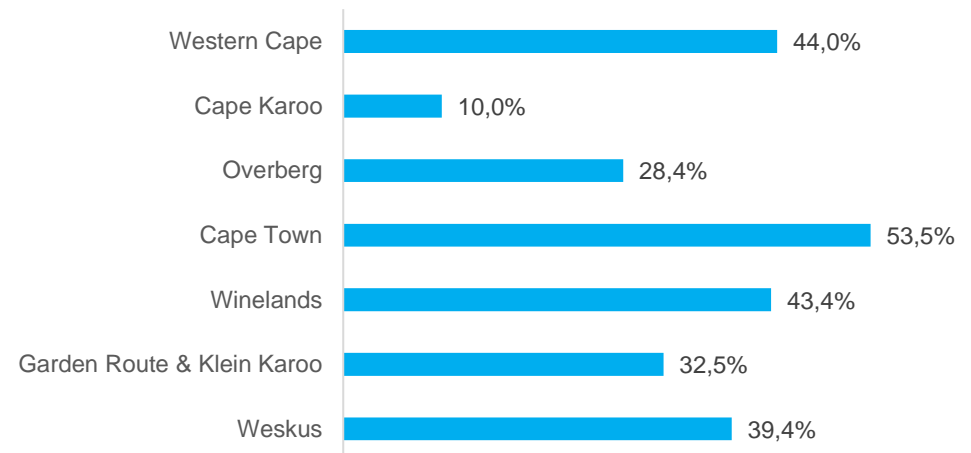
Mobile Insights: International Visitor Trends

- According to the mobile data insights on the sample size of international tourists, it was found that the majority of tourists, that is, 58.8%, visited Cape Town.
- The second most visited destination was the Garden Route & Klein Karoo, with 13.3% of the tourists exploring this region, followed by the Cape Karoo, which was visited by 12.7% of the tourists. However, it is important to note that the sample size for the Cape Karoo was only 0.6% international tourists, which is not statistically representative of the visitor trends for this region.
- Moving on to the international repeat visitors, the mobile data insights found that Cape Town was the most popular destination, with 53.5% of the repeat visitors choosing to return to this city. The Winelands, Weskus, and Garden Route & Klein Karoo regions were also popular among repeat visitors, with 43.4%, 39.4%, and 32.5% of tourists revisiting these places respectively in December 2023.

International Sample Size, Dec. 2023



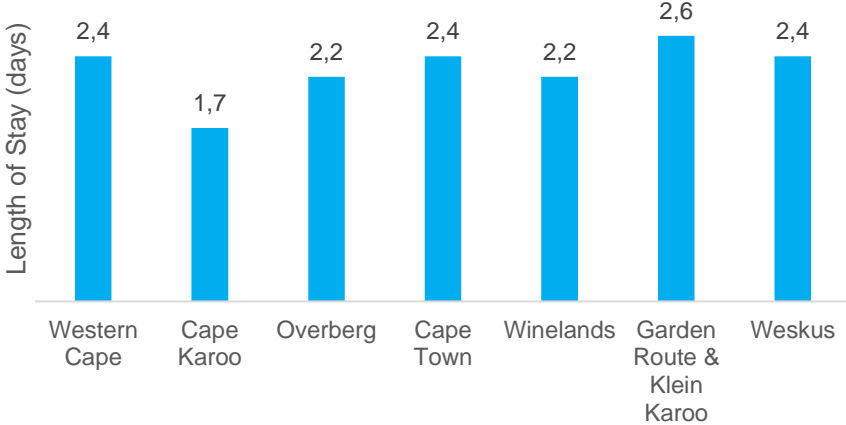
International Tourists Repeat Visits, Dec. 2023



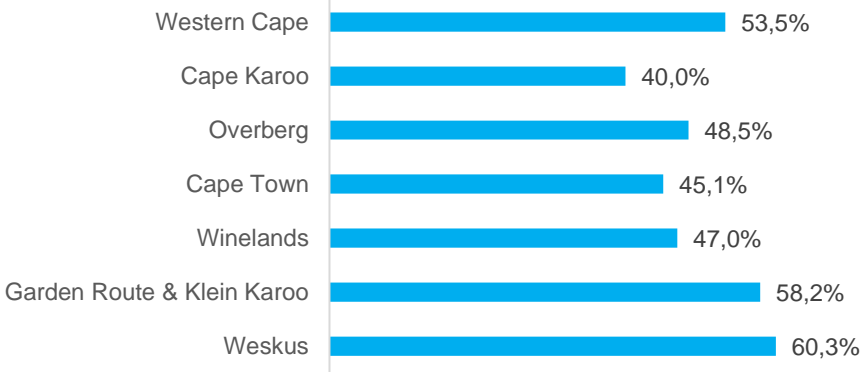
Mobile Insights: International Visitor Trends

- According to the mobile data insights, the Garden Route & Klein Karoo region, Cape Town, and Weskus are the most popular destinations among international tourists, with an average stay of 2.6 days, 2.4 days, and 2.2 days respectively.
- Moreover, more than 60% of the tourists stayed overnight in Weskus, while 58.2% stayed overnight in the Garden Route & Klein Karoo, and almost half of the tourists stayed overnight in Overberg, Cape Town, and Winelands regions.
- Additionally, the mobile data insights indicate that half of the international tourists visited the Winelands region for 15-21 days, while 50% spent only one day in the Cape Karoo.
- It's worth noting that the overnight stay is defined as tourists who arrive before midnight and stay until 07:00 the following day.

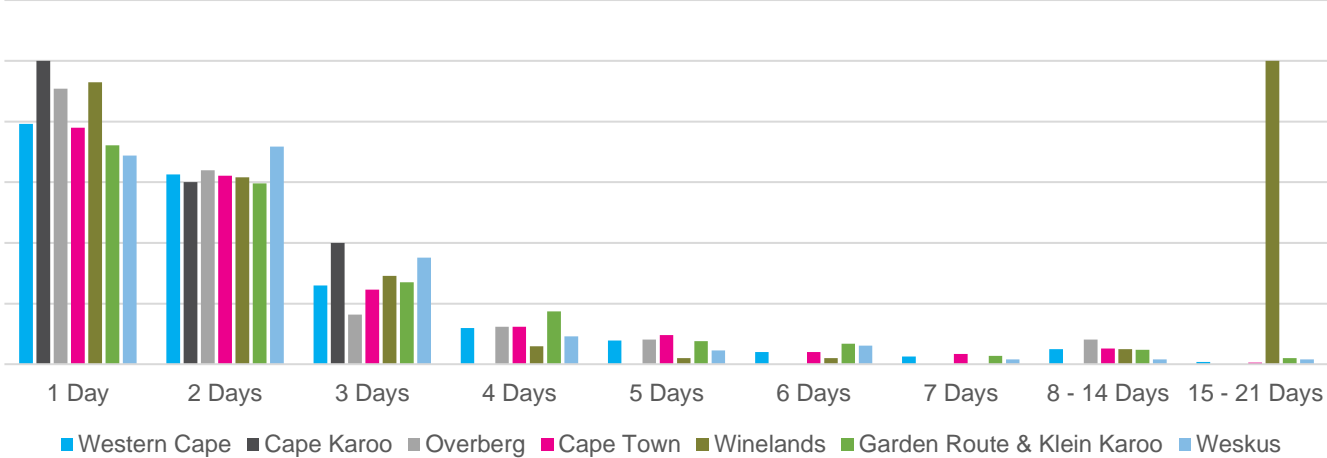
Average Length of Stay (LOS), Dec. 2023



% Overnight Stays, Dec. 2023



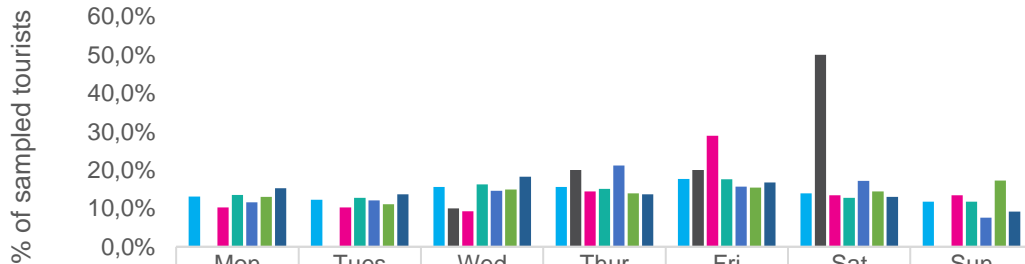
Average Length of Stay (Number of Days): International, Dec. 2023



Mobile Insights: International Visitor Trends

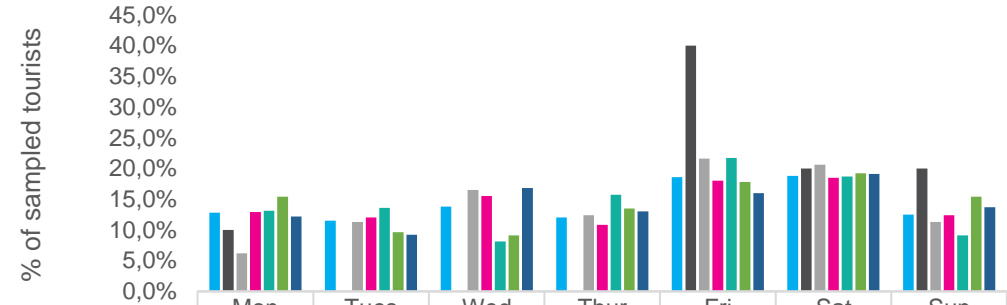
- During December 2023, international tourists to the **Western Cape** mainly arrived between Friday and Saturday and departed on a Friday.
- The sampled tourists (10) in the **Cape Karoo**, arrived on a Friday and departed on a Saturday.
- Friday and Saturday were the most popular arrival days and Friday was the day of departure from **Cape Town**.

Popular Arrival Days of the Week: International, Dec. 2023



| | | | | | | | |
|------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Western Cape | 13,1% | 12,3% | 15,6% | 15,6% | 17,7% | 13,9% | 11,8% |
| ■ Cape Karoo | 0,0% | 0,0% | 10,0% | 20,0% | 20,0% | 50,0% | 0,0% |
| ■ Overberg | 10,3% | 10,3% | 9,3% | 14,4% | 28,9% | 13,4% | 13,4% |
| ■ Cape Town | 13,5% | 12,8% | 16,3% | 15,1% | 17,6% | 12,8% | 11,8% |
| ■ Winelands | 11,6% | 12,1% | 14,6% | 21,2% | 15,7% | 17,2% | 7,6% |
| ■ Garden Route & Klein Karoo | 13,0% | 11,1% | 14,9% | 13,9% | 15,4% | 14,4% | 17,3% |
| ■ Weskus | 15,3% | 13,7% | 18,3% | 13,7% | 16,8% | 13,0% | 9,2% |

Popular Departure Days of the Week: International, Dec. 2023

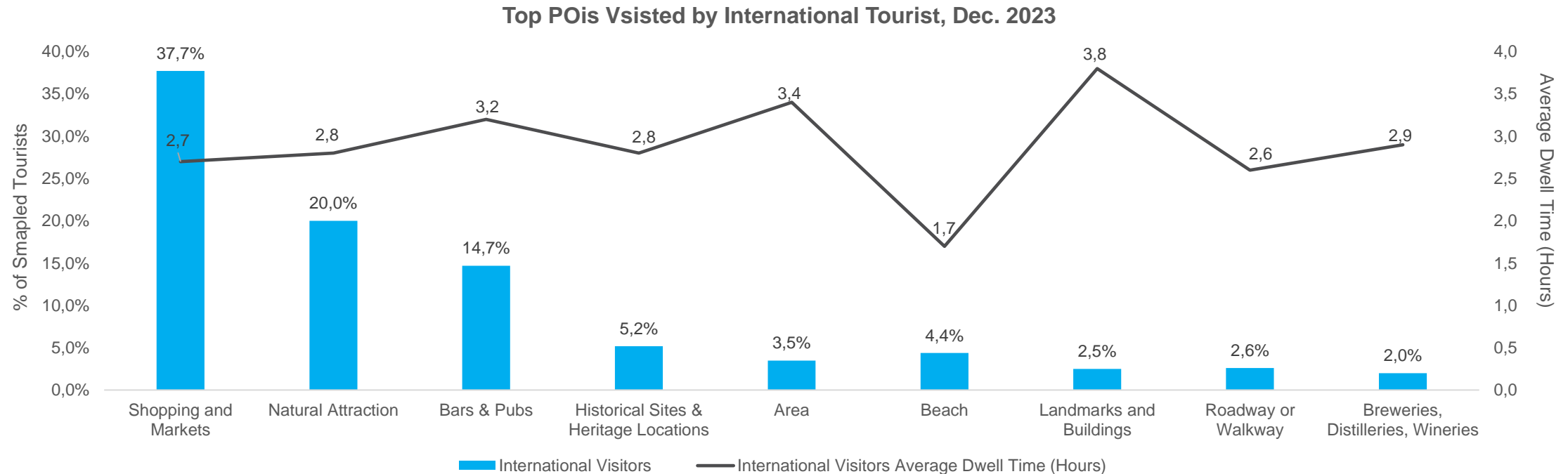


| | | | | | | | |
|------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Western Cape | 12,8% | 11,5% | 13,8% | 12,0% | 18,6% | 18,8% | 12,5% |
| ■ Cape Karoo | 10,0% | 0,0% | 0,0% | 0,0% | 40,0% | 20,0% | 20,0% |
| ■ Overberg | 6,2% | 11,3% | 16,5% | 12,4% | 21,6% | 20,6% | 11,3% |
| ■ Cape Town | 12,9% | 12,0% | 15,5% | 10,8% | 18,0% | 18,5% | 12,4% |
| ■ Winelands | 13,1% | 13,6% | 8,1% | 15,7% | 21,7% | 18,7% | 9,1% |
| ■ Garden Route & Klein Karoo | 15,4% | 9,6% | 9,1% | 13,5% | 17,8% | 19,2% | 15,4% |
| ■ Weskus | 12,2% | 9,2% | 16,8% | 13,0% | 16,0% | 19,1% | 13,7% |

- Arrival in the **Winelands** region was on Friday and departure from the region was on Thursday.
- **Garden Route & Klein Karoo** arrival day was either Friday or Saturday and departure day was on Friday.
- Saturday was the most popular arrival day and the departure day from the **Weskus** was either Wednesday.
- In the **Overberg**, Friday or Saturday were the popular days for arrival, and the day of departure was on Friday.

Points of Interest (POIs) Visited: International Tourists

- **Shopping and markets** were the most popular type of attraction visited by international tourists with an average dwell time of **2.7 hours**.
- **Natural attractions** ranked as the 2nd most popular point of interest among international tourists, with an average dwell time of **2.8 hours**.
- **Bars and pubs** were the 3rd most popular point of interest for international tourists spent an average of **3.2 hours** at the location
- **Historical sites and heritage locations** ranked the 4th most popular point of interest among international tourists, with an average dwell time of **2.8 hours**.
- **Spending time in areas** like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley, and Van Dyk's Bay ranked 5th amongst the top POIs visited by international tourists, with an average dwell time of **3.4 hours**.



Definitions of Mobile Location Data and Tourists vs non-Tourists

- About Mobile Location Data

- Privacy compliant data is collected from location-enabled apps on mobile devices. Data is collected when those location-enabled mobile devices enter our geo-fenced areas.
- Data is collected through applications (news, weather, games, texting apps, traffic, etc).
 - Year-over-year numbers could be skewed by increased app penetration and data privacy settings/policies.
 - The exception is 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•
- This 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?

- A tourist is typically defined as follows:
 - A visitor who does not live or work within the study geography
 - A visitor who travels a minimum distance to the study geography
 - A The visitor who appears in the study geography for a minimum period of time (exclude commuters/passers through, etc.)

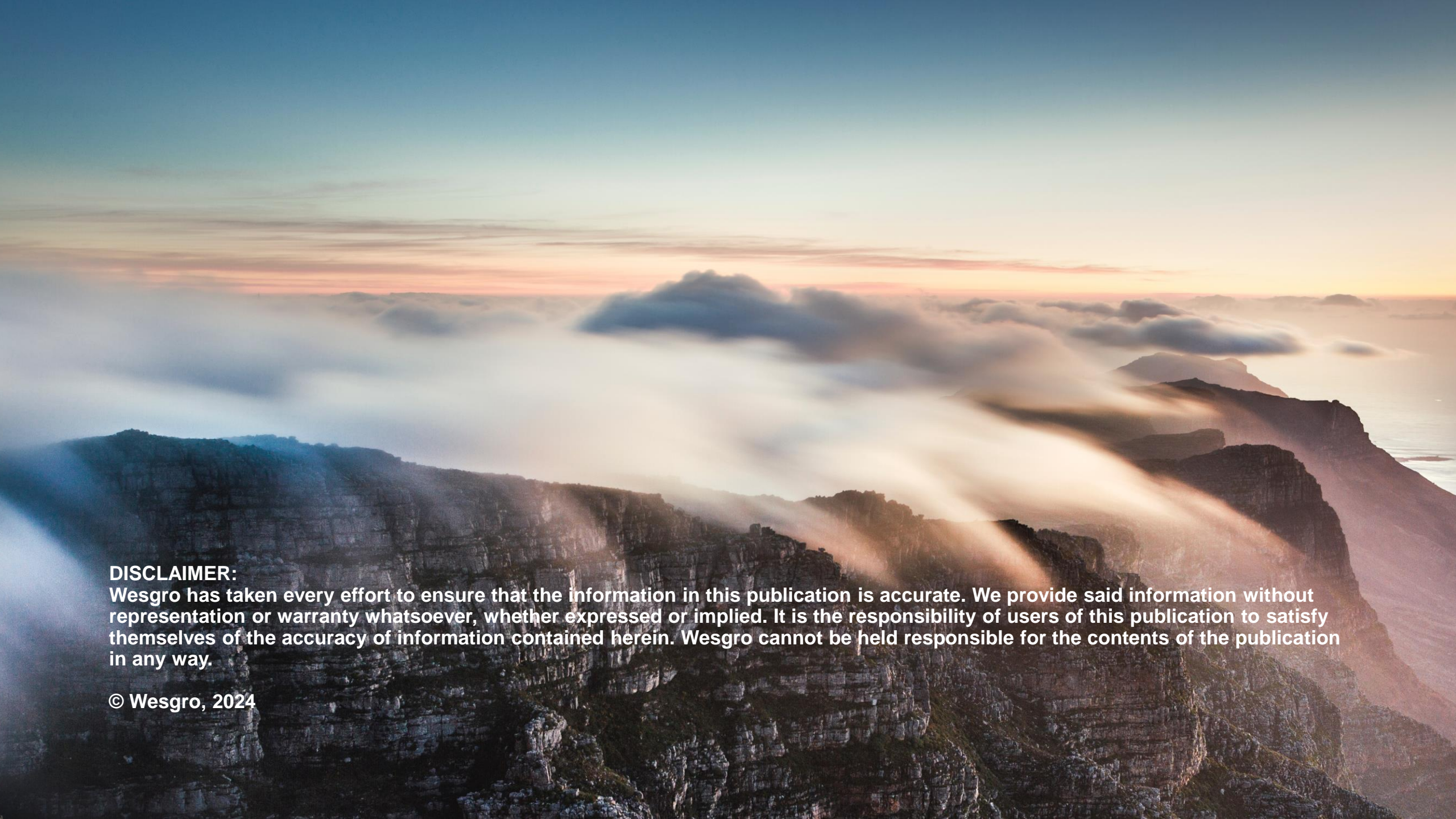
Source: Rove, 2024

Definitions of Mobile Location Data and Tourists vs non-Tourists

| Primary Study Geography | | Tourists are defined as: |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| Province/Tourism Regions | When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled 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 travelled to meet the definition of tourist. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon Minimum duration of visit of 120 minutes excludes commuters driving through each region | | |
| 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 travelled 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 tourists to the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance travelled. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre 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.). | | |
| 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 the 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 visitorship 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 to Friday, 8am to 6pm local 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 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 devices which are determined NOT to 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 characterises 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 who arrived prior to midnight (0:00) and stayed until 07:00 the following day. |
| Day Trippers | Term which characterises 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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