

An aerial photograph of a coastal road in South Africa. The road is a two-lane asphalt road that curves along the edge of a steep, rocky cliffside. The cliffside is covered in sparse, dry vegetation. In the background, there are several large, rugged mountains under a bright blue sky with scattered white clouds. The ocean is visible on the left side of the image, with white waves crashing against the rocks at the base of the cliff.

Niche Tourism Study

Adventure Tourism: Market Potential in South Africa
and the Western Cape

December 2023

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1. Report purpose and methodology

Purpose

1. The report on adventure tourism aims to provide useful information that can assist tourism operators, Destination Marketing Organisations (DMOs), business leaders, and government officials in South Africa and the Western Cape to develop practical marketing strategies.
2. The report offers insights that aim to increase awareness, educate, and inspire these stakeholders to enhance and sustain the demand for adventure tourism.

Methodology

1. This study was compiled from desktop research and reviews of international, national, and local sources regarding the adventure tourism market.
2. Rove mobile location data insights were used to illustrate the sample of the adventure tourism market per points of interest (POIs) in the Western Cape.
3. A regional visitor tracking survey was used to illustrate the sample of the adventure tourism market per region in the Western Cape.

Objectives of the study

1. To gain a comprehensive understanding of the adventure tourism market in South Africa and the Western Cape
2. To identify the key drivers of adventure tourism in the Western Cape and understand the motivations of tourists who visit this region.
3. To identify the barriers to growth and opportunities for increasing the demand for adventure tourism in the Western Cape.

2. Methodology: Rove mobile location data insights

2.1 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.

2.2 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.

2.3 Participation and sample size

The insights reflected in this section highlight mobile location data from a sample of 2,765 tourists who visited the following adventure points of interest (POI) in the Western Cape between January and December 2022:

Table 1: Total number of tourists per adventure POIs, Jan-Dec 2022

| Adventure points of interest (POI) | Number of Tourists |
|------------------------------------|--------------------|
| Atlantis Sand Dunes | 625 |
| Cape Town Ziplining | 80 |
| Ceres Ziplining | 157 |
| Stormsriver Suspension Bridge | 24 |
| Viljoensdrift River Cruise | 300 |
| Boulders Beach and Penguin Colony | 1,295 |
| Cape Town Ostrich Ranch | 284 |

Source: ROVE, 2023

3. Regional visitor tracking surveys: Methodology and sample size

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.

Definition: Visitor: Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.

Between January to December 2022, a total of 10,845 responses to the regional visitor tracking surveys were received from the various tourism offices in the Western Cape and **911 of the responses were from the visitors who took part in adventure activities.** The participating tourism offices were from the following regions:

Table 2: Total number of responses from Jan-Dec 2022

| Region | Number of Surveys |
|----------------------------|-------------------|
| Garden Route & Klein Karoo | 70 |
| Overberg | 467 |
| Weskus | 346 |
| Winelands | 28 |



Source: Wesgro, 2023

4. Definitions

- **Visitor:** *“Any person traveling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.” (SAT, 2023)*
- **Tourist:** *“A visitor who stays at least one night in the place visited.” (SAT, 2023)*
- **International Tourist:** *“An international visitor who stays at least one night in collective or private accommodation in the country visited.” (SAT, 2023)*
- **Local tourists:** *“Tourists who reside within the same Region.” (SAT, 2023)*
- **Sustainability** is defined as *“meeting the needs of the present without compromising the ability of future generations to meet their own needs.” (United Nations Brundtland Commissions, 1987)*
- **Sustainable Tourism** is *“tourism that takes full account of its current and future economic, social, and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.” (UNWTO, 2014)*
- **Responsible Tourism** is *“tourism which minimises negative social, economic and environmental impacts. Generates greater economic benefits for local people and enhances the well-being of communities.” (UNWTO, 2014)*
- **Responsible Travel** *“refers to the behavior of individual travellers aspiring to make choices according to sustainable tourism practices.” (Global Sustainable Tourism Council, 2022)*
- **Destination Management and/or Marketing Organisations (DMOs)** *“are dedicated entities that are established to take on some of the functions of destination management directly, rather than relying on the partners to execute.” (World Bank Group. 2022)*

5. Adventure tourism overview

The Adventure Travel Trade Association (ATTA) defines adventure tourism as:

“A trip that includes at least two of the following three elements – physical activity, natural environment, and cultural immersion.”

- Adventure tourism is a rapidly growing market in South Africa's tourism industry, as highlighted by Geldenhuys' 2018 academic study. Industry stakeholders are becoming increasingly aware of the economic value it brings. This study also showed that adventure tourism places a strong emphasis on sustainability, conservation, and protection of the environment. As a result, tourists from various countries are willing to travel to destinations that offer a range of outdoor, nature, scenic beauty and adrenaline experiences.
- According to Allied Market Research (2023), the global adventure tourism market in 2022 was valued at \$366.7 billion and is forecasted to increase to \$4.6 trillion by 2032. This is supported by the United Nations World Tourism Organisation's Global Report on Adventure Tourism which points out that this sub-sector attracts high-value tourism consumers with high spending power which directly has a spillover effect on the supporting local economies.
- With the tourism industry bouncing back after the travel ban, it is essential for destination marketing organisations (DMOs), tourism operators, and businesses to acknowledge that tourists' decision-making and preferences are evolving. The latest data from South African Tourism (2023) reveals that consumers now prioritise gathering and sharing "real-time" experiences over collecting products during their travels.
- The Western Cape is ideal for catering to the niche adventure tourism market due to the growing focus on sustainability and the importance of promoting understanding between humans and nature.

6. Adventure tourism travel market to South Africa

- In 2022, Europe accounted for the largest share of tourists (63.7%) enjoying adventure experiences in South Africa, followed by North America (16.2%) and Africa (11.3%).
- Among the top 10 activities enjoyed by Europeans in 2022, adventure ranked as the most popular activity (enjoyed by 63.7% of tourists), followed by wildlife experiences (61.5%).
- Figure 3 shows that 5 markets that engaged in adventure experiences in South Africa were the UK (18.3%), Germany (13.9%), the USA, (13.8%), Netherlands (6.7%), and France (5.6%).

Figure 1: International tourists who engaged in adventure experiences in South Africa, 2022

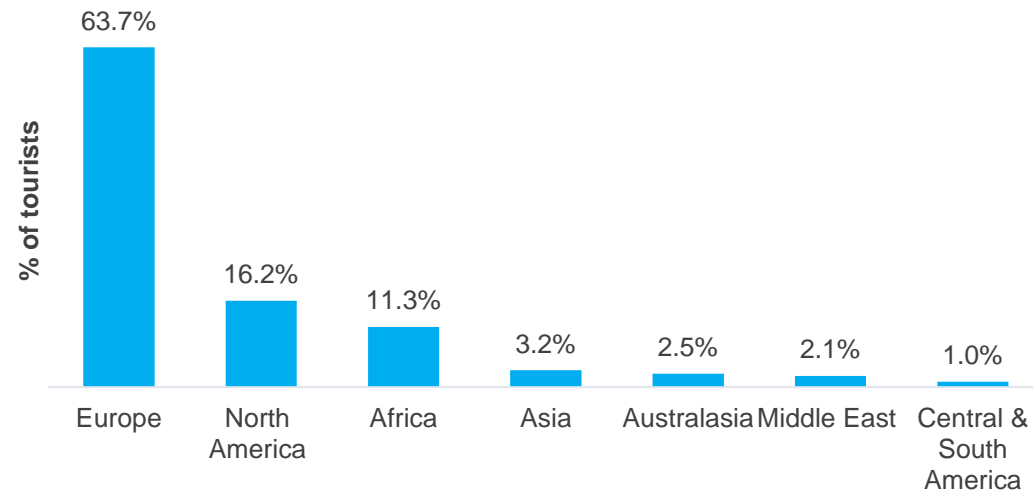
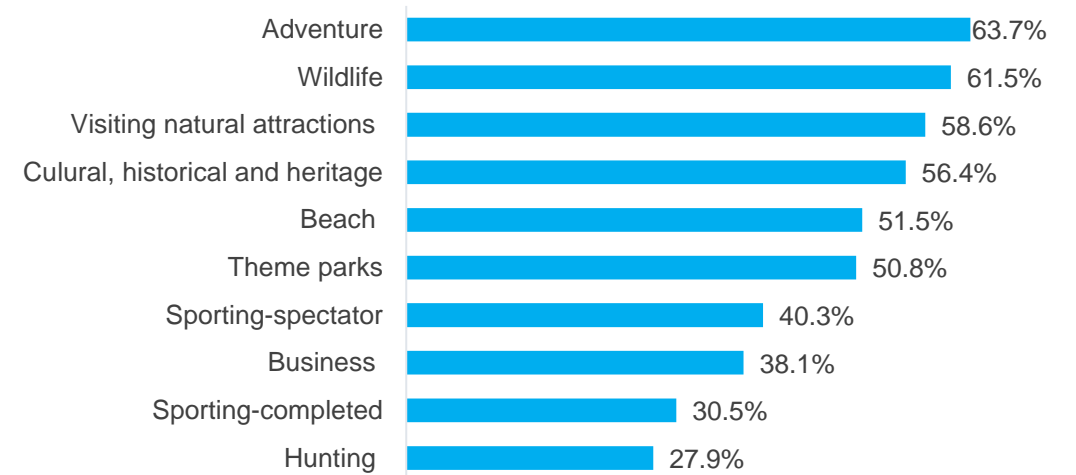


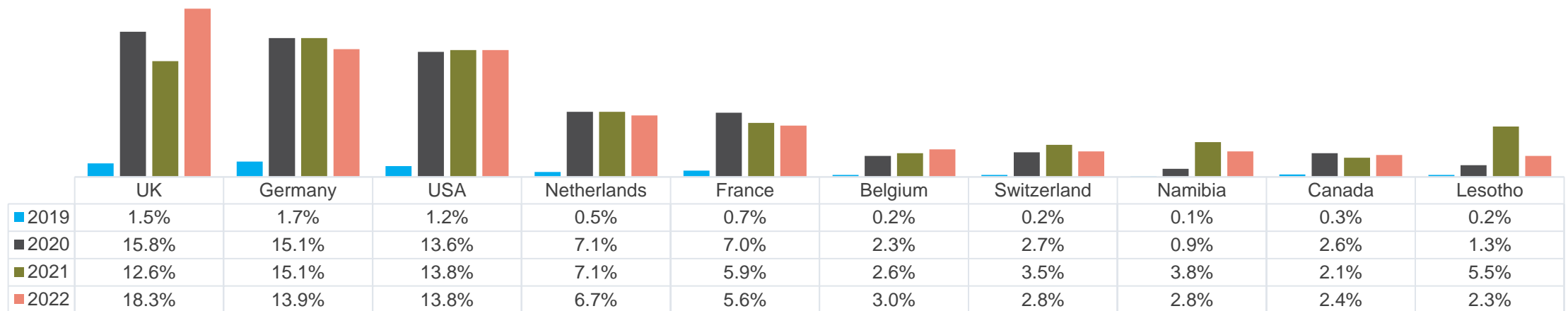
Figure 2: Top 10 activities undertaken by European tourists to South Africa, 2022



6. Adventure tourism travel market to South Africa

- As previously mentioned, European countries dominated when it came to engaging in adventure experiences in South Africa with 6 out of 10 markets originating from the continent. The leading source markets, the UK, Germany, and the USA, held a substantial interest in adventure experiences in South Africa, particularly during the Covid-19 period and when tourism was reopened in the country.
- Upon analysing the African tourism industry, it has been observed that Namibia and Lesotho have been actively participating in adventure experiences in South Africa during the year 2021 as compared to the previous year 2020. However, the data suggests that there has been a slight decrease in tourist participation in adventure experiences during the year 2022.

Figure 3: Top 10 source markets engaging in adventure experiences in South Africa, 2019-2022



Source: South African Tourism, 2022

7. Adventure tourism travel market to the Western Cape

Figure 4: Share of tourists engaging in adventure activities by province, 2022

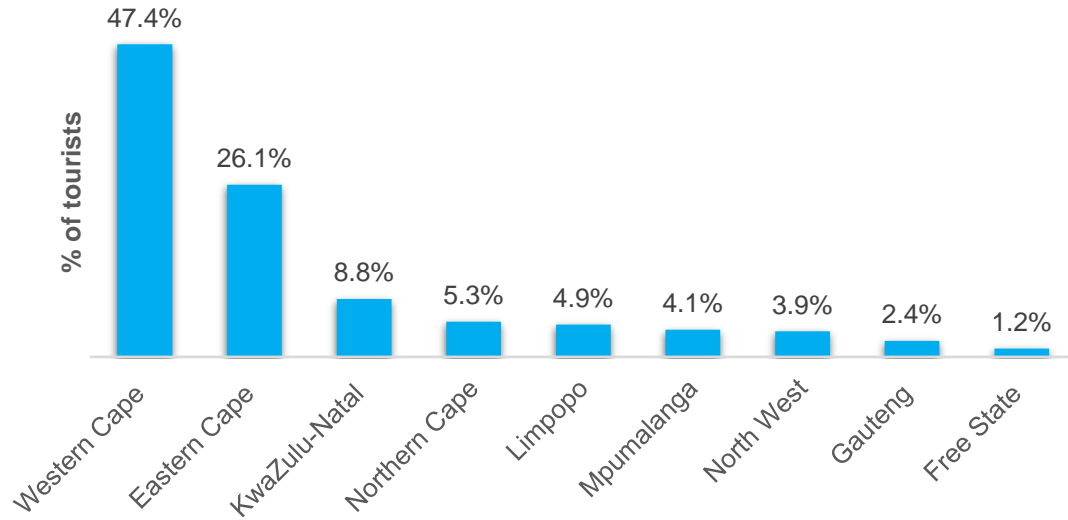
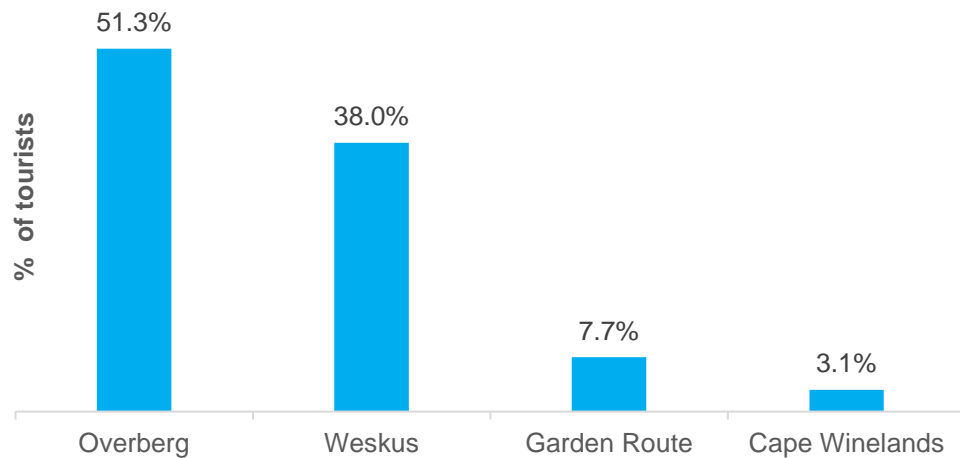
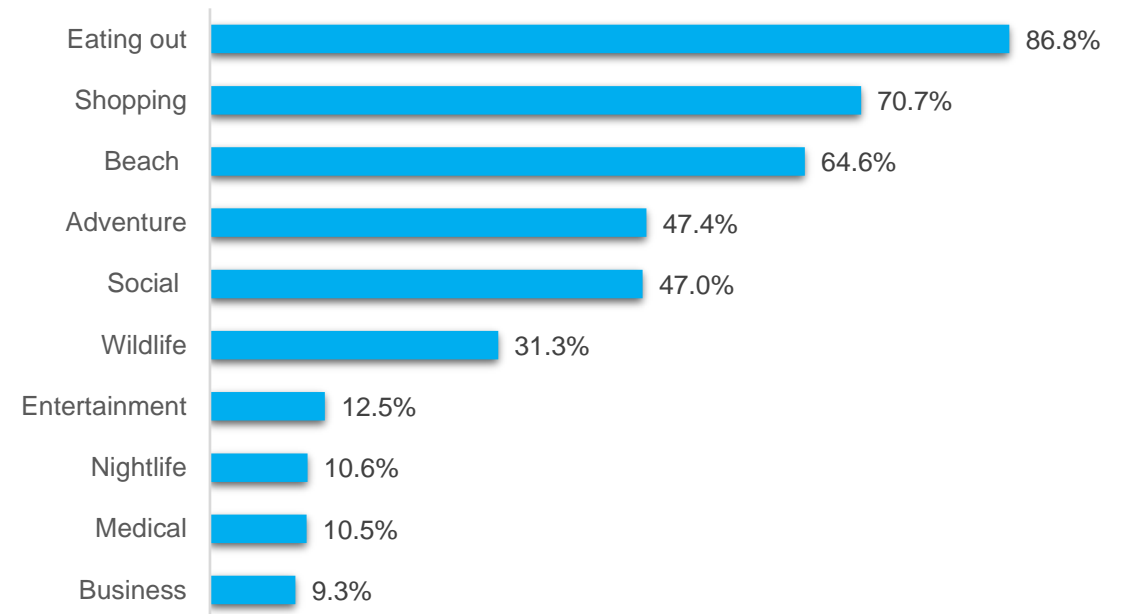


Figure 5: Western Cape regions visited for adventure activities, 2022



- The Western Cape attracted the most tourists (47.4%) who indicated adventure activities as one of their top activities of choice. In addition, adventure ranked 4th after eating out, shopping, and beach experiences. These figures can be observed in Figures 4 and 6.
- Between January to December 2022, a total of 911 respondents to the regional visitor tracking surveys conducted by various tourism offices in the Western Cape indicated they had visited and engaged in adventure experiences.
- By region, 51.3% of tourists to the Overberg and 38.0% participated in adventure activities in the Weskus region, as shown in Figure 5.

Figure 6: % Western Cape activities ranking, 2022

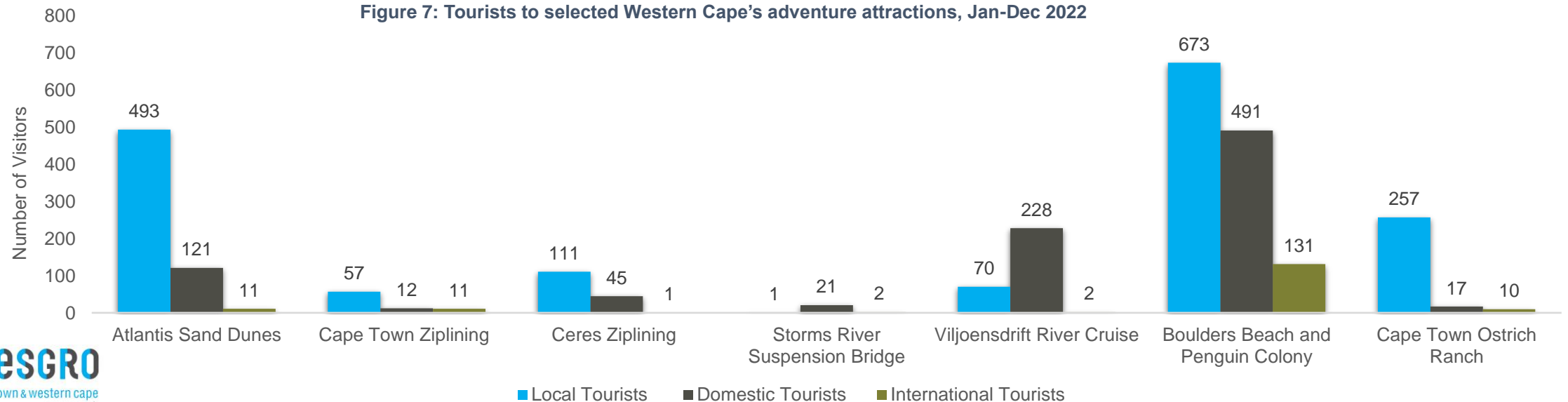


7. Adventure tourism travel market to the Western Cape

The following four sections represent visitors' travel movements to selected adventure tourism attractions through mobile location data insights from January to December 2022.

- Between January and December 2022, Boulders Beach and the Penguin Colony attracted the largest sample of visitors amongst the adventure points of interest presented in Figure 7. The site was visited by over 600 locals, 491 domestic visitors, and 131 international visitors.
- The Atlantis Sand Dunes attracted the second largest sample of visitors, of whom 493 were locals and 121 domestic visitors. This was followed by Cape Town Ostrich Ranch with a larger sample of 257 local visitors, the Viljoensdrift River Cruise with 228 domestic visitors, and Ceres Ziplining which attracted 111 local visitors.
- Cape Town Ziplining and the Storms River Suspension Bridge received the lowest number of visitors. Some 57 local visitors visited Cape Town Ziplining and 21 domestic visitors to the Storms River Suspension Bridge.
- According to Figure 7, locals showed more interest in participating in adventure activities at Boulders Beach and the Penguin Colony, the Atlantis Sand Dunes, and the Cape Town Ostrich Ranch. Domestic visitors, on the other hand, preferred adventure activities at Boulders Beach and the Penguin Colony, the Viljoensdrift River Cruise, and Atlantis Sand Dunes. International visitors, however, were more inclined towards water-based adventure activities at Boulders Beach and the Penguin Colony.

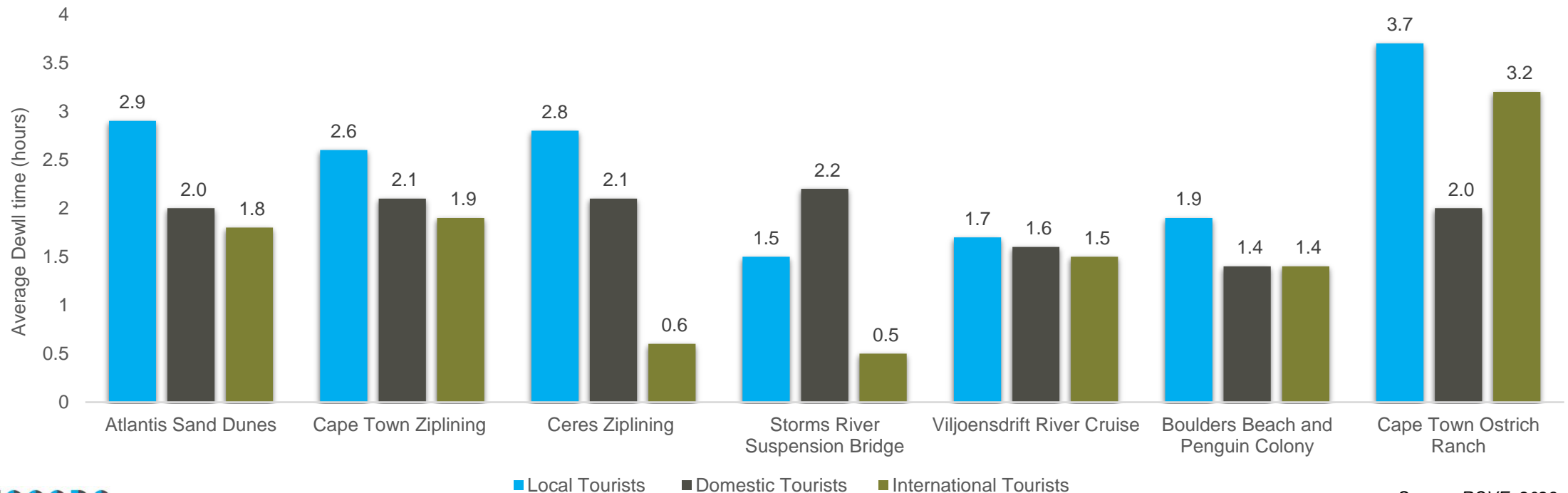
Figure 7: Tourists to selected Western Cape's adventure attractions, Jan-Dec 2022



7. Adventure tourism travel market to the Western Cape

- During the period between January and December 2022, visitors, both local and international, spent the most time at the Cape Town Ostrich Ranch, with an average of 2.0-3.7 hours. Ceres Ziplining, Atlantis Sand Dunes, and Cape Town Ziplining were the attractions where mostly local and domestic visitors spent an average of 2.1-2.9 hours.
- On the other hand, international visitors spent an average of 3.2 hours at the Cape Town Ostrich Ranch, followed by 1.9 hours at the Cape Town Ziplining, 1.8 hours at the Atlantis Sand Dunes, and an average of 1.5 hours at the Viljoensdrift River Cruise and 1.4 hours at the Boulders Beach, and the Penguin Colony.

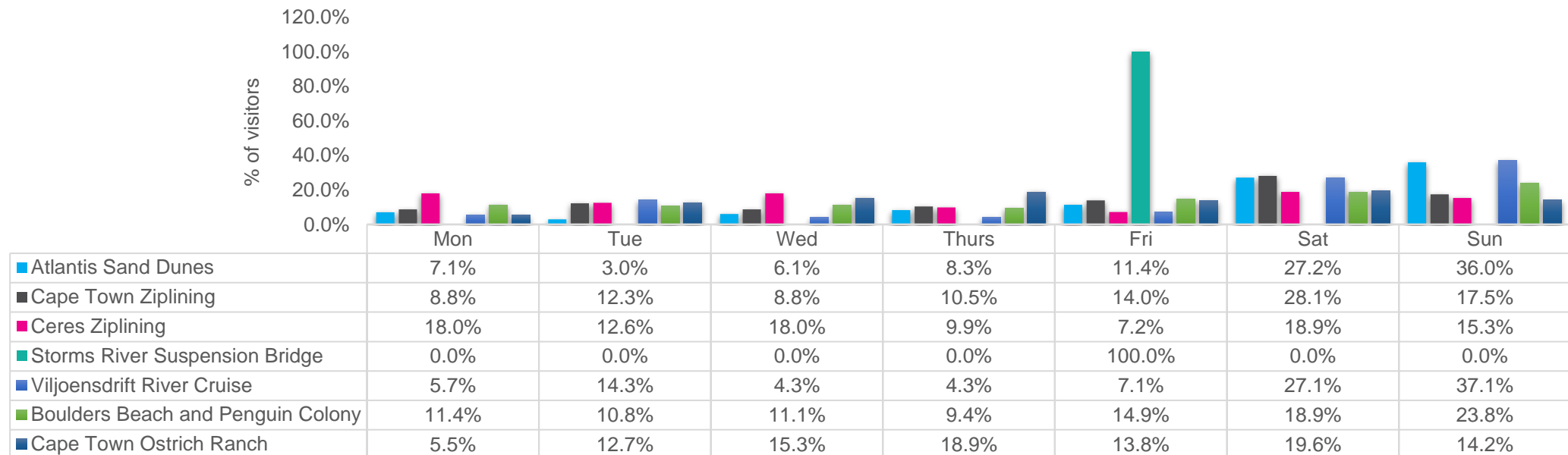
Figure 8: Average time at selected Western Cape's adventure attractions, Jan-Dec 2022



7. Adventure tourism travel market to the Western Cape

- According to the data presented in Figure 9, it can be observed that the weekends, specifically Saturday and Sunday, were the most popular days for locals to participate in adventure activities at the Atlantis Sand Dunes, Cape Town Ziplining, and Viljoensdrift River Cruise. This trend was also observed among the domestic market, with the Atlantis Dunes, Cape Town Ziplining, Ceres Ziplining, and Viljoensdrift River Cruise being the most popular adventure activities over the weekend.
- However, it is interesting to note that Wednesday was the preferred day for visiting the Storms River Suspension Bridge, while the Cape Town Ostrich Ranch was mostly visited on Wednesdays and Thursdays by the domestic market, as seen in Figure 10.
- On the other hand, the international market showed a different trend, as seen in Figure 11. However, it is important to note that the sample size for the international market was relatively small. Nonetheless, it was observed that the international market visited Cape Town and Ceres Ziplining on Mondays, the Viljoensdrift River Cruise on Tuesdays, the Storms River Suspension Bridge on Wednesdays and Saturdays, and the Atlantis Sand Dune was most visited over the weekend.
- Overall, the data suggests that weekends are the most popular time for locals and domestic tourists to engage in adventure activities, while the international market seems to have a more varied schedule.

Figure 9: Popular days of the week for visiting selected adventure attractions by local visitors, Jan-Dec 2022



7. Adventure tourism travel market to the Western Cape

Figure 10: Popular days of the week for visiting selected adventure attractions by domestic visitors, Jan-Dec 2022

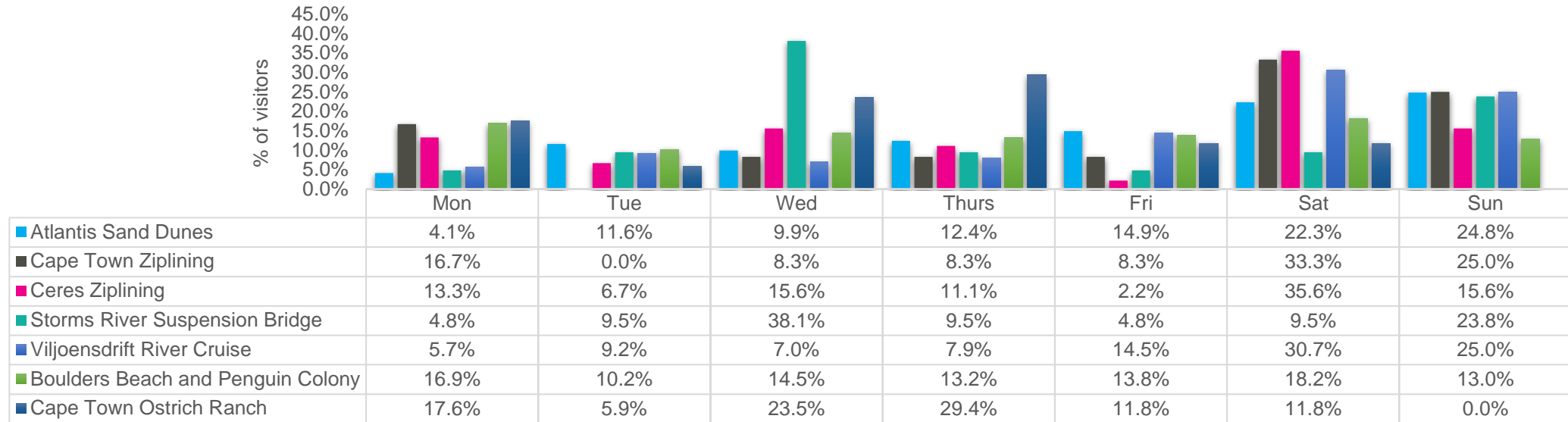
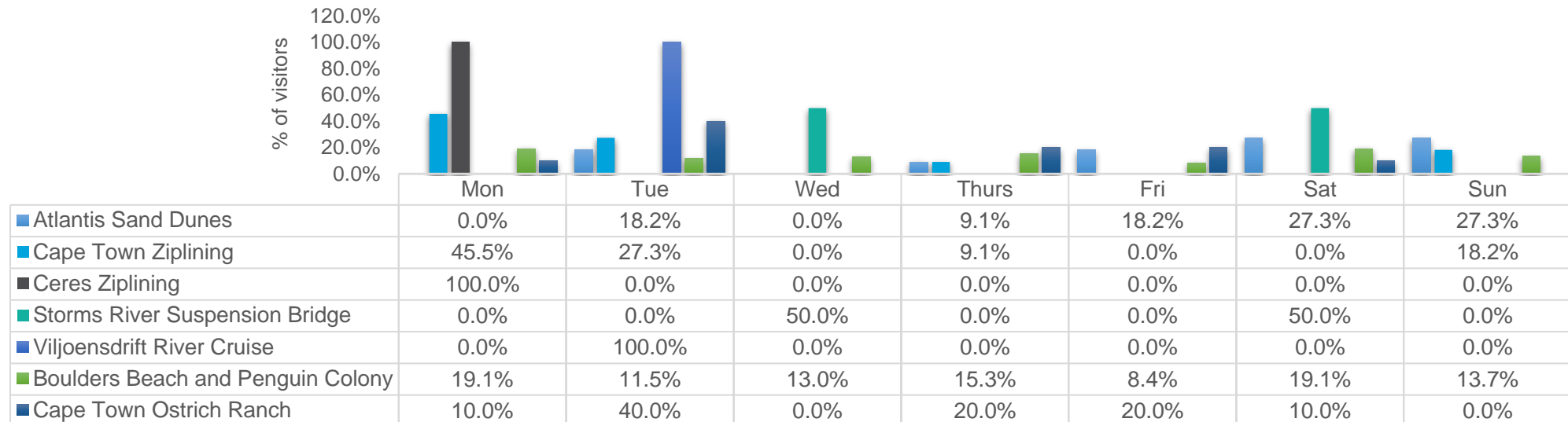


Figure 11: Popular days of the week for visiting selected adventure attractions by international visitors, Jan-Dec 2022



8. Types of adventure tourism and activities in the Western Cape

Adventure tourism offers a unique and thrilling travel experience for those seeking a little excitement. It can be broadly categorized into two types: soft adventure tourism and hard adventure tourism. Soft adventure tourism typically involves safe and easy-to-learn activities that do not require prior experience or special skills, such as hiking, cycling, or wildlife safaris. On the other hand, hard adventure tourism is for thrill-seekers who are willing to take on greater risks and challenges.

The Western Cape province is a popular destination for adventure tourism, offering a wide range of activities for both soft and hard adventure enthusiasts. Table 2 lists some of the exciting adventure activities available to tourists in the Western Cape. The province's diverse landscape and natural beauty make it an ideal destination for adventure tourists looking to challenge themselves while enjoying the great outdoors.

Table 12: Soft and hard adventure activities

| Niche market | Activity | Niche market | Activity |
|--------------------------|------------------------------|----------------------------------|-------------------------------|
| Land-based activities | Game capture experiences | Air-based activities | Sandboarding |
| | Animal viewing | | Mountain rides |
| | Animal interaction | | Bird watching |
| | Sandboarding | | Mountain biking |
| | Skateboarding | | Hot air ballooning |
| | Kloofing | | Paragliding |
| | Coasteering | | Skydiving |
| | Spelunking | | Helicopter scenic flight |
| | Tunnel tour | | Tandem paragliding experience |
| | Bungee | | Ziplining |
| | Quad biking | Water-based adventure activities | Snorkelling |
| | 4x4 | | Marine big 5 tour |
| | Abseiling | | Scenic day cruise |
| | Rock sliding | | Surfing |
| | Walking safaris | | Water skiing |
| | Stargazing | | SUP |
| | Classic sandboarding | | Guided kayak tour |
| | “High 5” stargazing | | Seal snorkelling |
| | Segway experience | | Guided shore dives |
| | Vineyard rides experiences | | Fishing |
| Wildlife watching | Whale watching | | |
| 4x4 coastal drive | Shark cage diving | | |
| 4x4 offroad tours | Speedboat tour | | |
| E-bike tour/safari tours | Guided ocean adventure tours | | |
| Horseback safari | Crocodile cage dive | | |
| Hiking and trekking | River rafting | | |

Source: CBI, 2023; ActivityHub 2023; SATSA, 2023

9. Potential adventure tourism travel market to the Western Cape

Consumer studies have shown that it is crucial to comprehend important factors such as the socio-demographic background and travel motivations of tourists to create and promote successful tourism experiences. According to South African Tourism reports on unlocking key markets indicate that South Africa's leading adventure tourism markets are the UK and the USA, which Western Cape destination management organisations (DMOs) and tourism operators can use to entice and influence adventure tourists to visit the province.

Table 13: Potential adventure tourism markets to Western Cape

| UK | Aspects | Profile | |
|----------------|--|--|---------------------------------------|
| UK | Average age | 25-40 years old | |
| | Average spending behaviour | ±R24 600 | |
| | Group Size | Solo traveller (62% in 2022) | |
| | Choice of Accommodation | Staying with family and friends | |
| | Travel package preferences | Book trips independently | |
| | Activities of choice/travel needs | Low-risk adventures | |
| | Preferred travel destination | Western Cape (54% in 2022) | |
| | Travel decision making based on / Sources of information | Word of mouth recommendations/referral and experiences | |
| | Perceptions of SA | | Positive: Value for money |
| | | | Negative: Concern for personal safety |
| | Average length of stay | 18 days in South Africa | |
| Repeat visitor | Repeat traveller | | |
| USA | Aspects | Profile | |
| USA | Average age | 25-40 and 40+ years old | |
| | Average spending behaviour | R33 500 | |
| | Group Size | Solo traveller | |
| | Choice of Accommodation | Staying with friends and Family | |
| | Travel package preferences | Book trips independently | |
| | Activities of choice/travel needs | Adventure | |
| | Preferred travel destination | Western Cape (44% in 2022) | |
| | Travel decision making based on / Sources of information | Recommendations by friends or family | |
| | Perceptions of SA | Positive: Value for money | |
| | Average length of stay | 12 days in South Africa | |
| | Repeat visitor | Mostly first-timers | |

10. Types of travellers that will influence adventure tourism in the Western Cape

10.1 Solo traveller

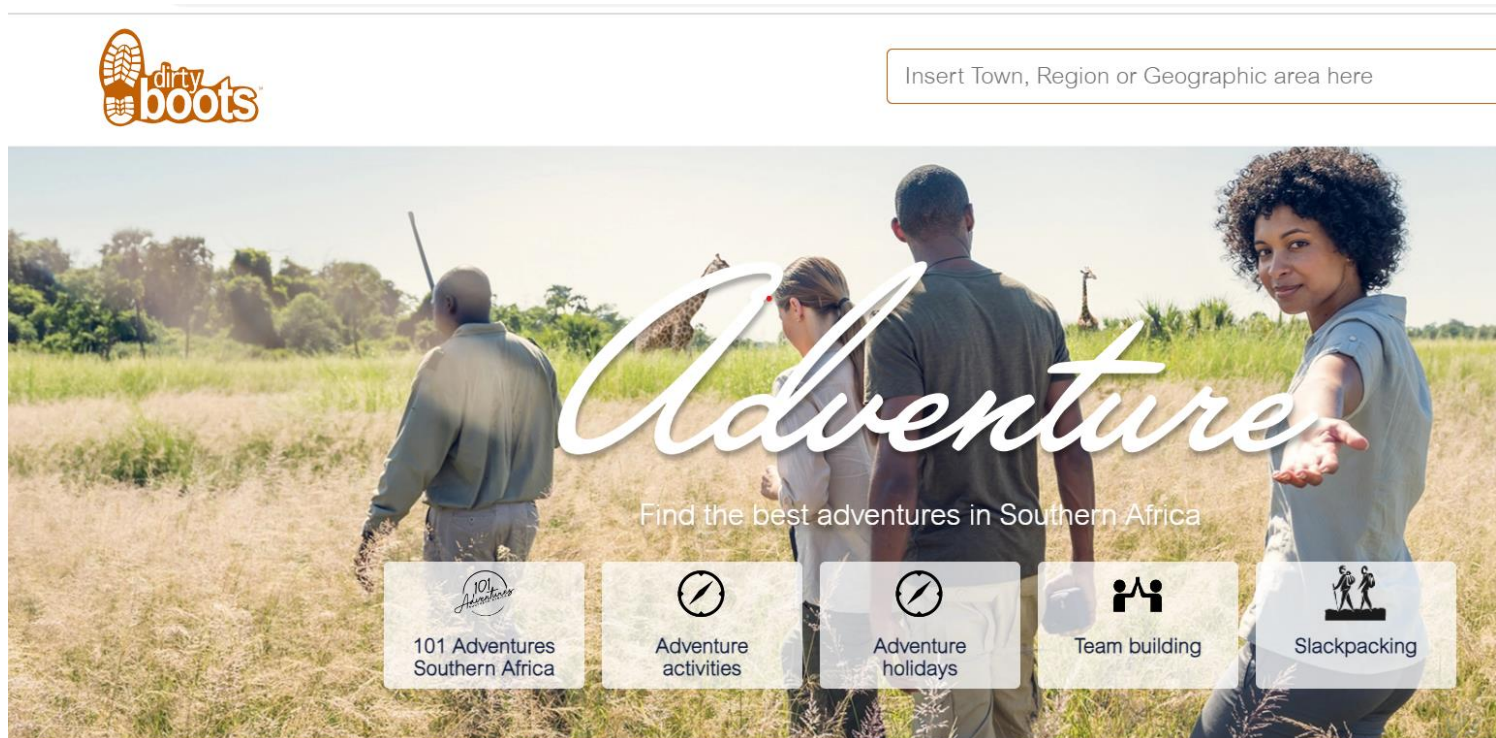
- Solo travel is a form of adventure tourism that has gained popularity in recent years. A solo traveler is defined as someone who chooses to travel alone, without the company of friends or family.
- They are driven by a desire to explore the world, experience new cultures, and challenge themselves by stepping out of their comfort zone. Solo travellers are motivated by a variety of factors, including the opportunity to meet new people, find solitude, and engage in self-reflection. For some, solo travel is about ticking items off their bucket list, while for others, it is a chance to escape their daily routine and gain a fresh perspective on life.
- Online platforms have become an essential tool for solo travellers, providing a wealth of information and resources to help them plan and book their trips. From flight and hotel reservations to itinerary planning and local recommendations, these platforms play a vital role in the decision-making process for solo travellers.
- Despite the misconception that solo travel is only for those on a tight budget, solo travellers tend to have a medium to high level of spending power. They are willing to invest in experiences that enrich their lives and create lasting memories.

10.2 Sustainable or responsible traveller

- A sustainable traveller is someone who is conscious of the impact of their travel choices and makes decisions that prioritize environmental sustainability, social responsibility, and cultural preservation. They seek out eco-friendly and low-impact forms of transportation, accommodation, and activities that promote sustainable tourism practices and minimize negative environmental impacts.
- A sustainable traveller also recognizes the importance of respecting and preserving local cultures, customs, and traditions, and aims to contribute to the local economy and community in a positive way. By adopting sustainable travel practices, they play a crucial role in safeguarding the environment, biodiversity, and cultural heritage of the places they visit.

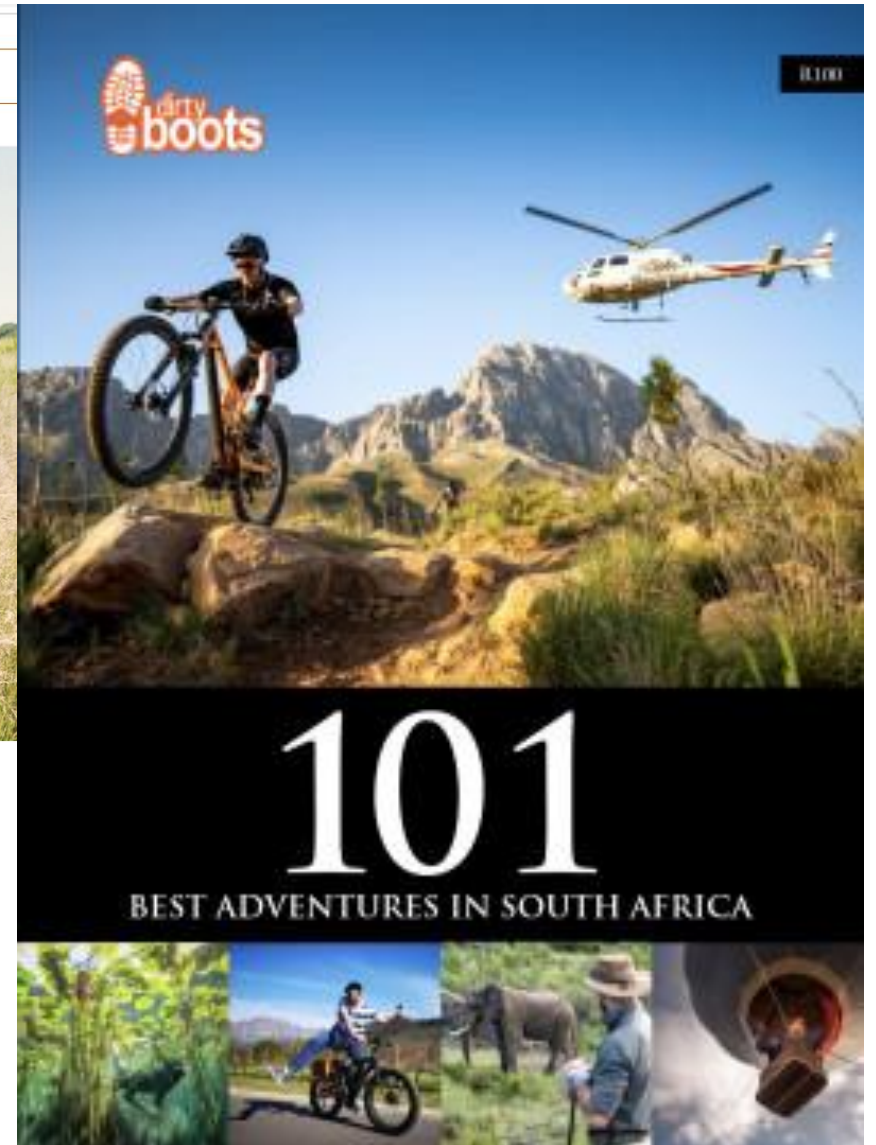
The screenshot shows a travel website with a navigation bar including 'HOME', 'TRAVEL', 'DESTINATIONS', 'THINGS TO DO', 'TRAVEL DEALS', 'WIN', 'VIDEOS', 'MAGAZINE', and 'FOOD & DRINK'. Below the navigation bar are three featured articles: 'Whale Watching Season: Where to go for the best show', 'SANParks opens nominations for annual Kudu Awards', and 'Durbanville winemakers to host exclusive tasting in Sandton'. The main article is titled 'Cape Town ranked 2nd best African destination for solo travellers', posted on 22 June 2023 by David Henning. The article text states: 'With the age of self-discovery, self-love and solo adventures taking centre stage in recent years, there has been a noticeable surge in independent travel across the globe. Gone are the days of painstakingly finding travel dates that suit the entire group.' Below the text is a photograph of a person silhouetted against a vibrant sunset over a coastal landscape. The website footer includes 'DAILY SOUTHERN & EAST AFRICAN TOURISM UPDATE' and navigation links for 'News', 'Features', 'Columns', 'Useful Info', 'Destinations', and 'Interests'. A second article is visible below, titled 'Solo travel a growing trend in Africa', dated 18 Aug 2023 by Christiaan Schultz, with a photograph of a person sitting on a rocky cliff overlooking a city and the ocean.

11. Adventure tourism in the Western Cape: Resource



The Dirty Boots Adventure Guide 8th edition was released in 2023 in an A4 magazine-style format. It provides information about various adventures in Cape Town and the Western Cape. The guide features popular destinations such as Cape Town, Hermanus, Knysna, Gansbaai, Stellenbosch, Simon's Town, Plettenberg Bay, and many more.

In addition, the Dirty Boots website makes it easy for tech-savvy individuals to access adventure information when planning their trips to the province.



11. Adventure tourism in the Western Cape: Resource

Responsible and Sustainable Travel

The issue of environmental degradation and resource depletion is a pressing concern for the global community. As such, the tourism industry has been working hard to ensure that negative environmental impacts are minimized while also protecting local biodiversity and cultural heritage.

One city that has taken significant steps towards sustainability is Cape Town, which has set an ambitious goal of being the global leader in sustainable tourism by 2020. To achieve this objective, the city has implemented a range of initiatives that prioritise responsible and sustainable tourism practices.

These initiatives include using renewable energy, reducing water consumption, recycling waste, promoting local culture, and supporting local businesses. Moreover, these initiatives are easily accessible to tourists who can access them online before or during their visit to the province. Overall, Cape Town's commitment to sustainable tourism is a model for other cities around the world, showing that it is possible to balance economic growth with environmental protection and cultural preservation.

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Cape Town Tourism August 17, 2023 Sustainable Cape Town 3 min Read

Sector Perspectives

Sustainability and Adventure Travel in Cape Town

Cape Town was acknowledged by the Ethisphere Institute of New York as 'One of ten cities in the world most likely to become centres of sustainability by 2020', made the list as one of the 'Top Ten Ethical Destinations in the World 2010' by Ethical Traveler, and was the first urban centre to receive the coveted 'Best Destination' Virgin Holidays Responsible Tourism Award in 2009. In 2002, representatives from tourism sectors across the board in twenty countries attended the Cape Town Conference on Responsible Tourism in Destinations, at which a declaration on responsible tourism was agreed upon.

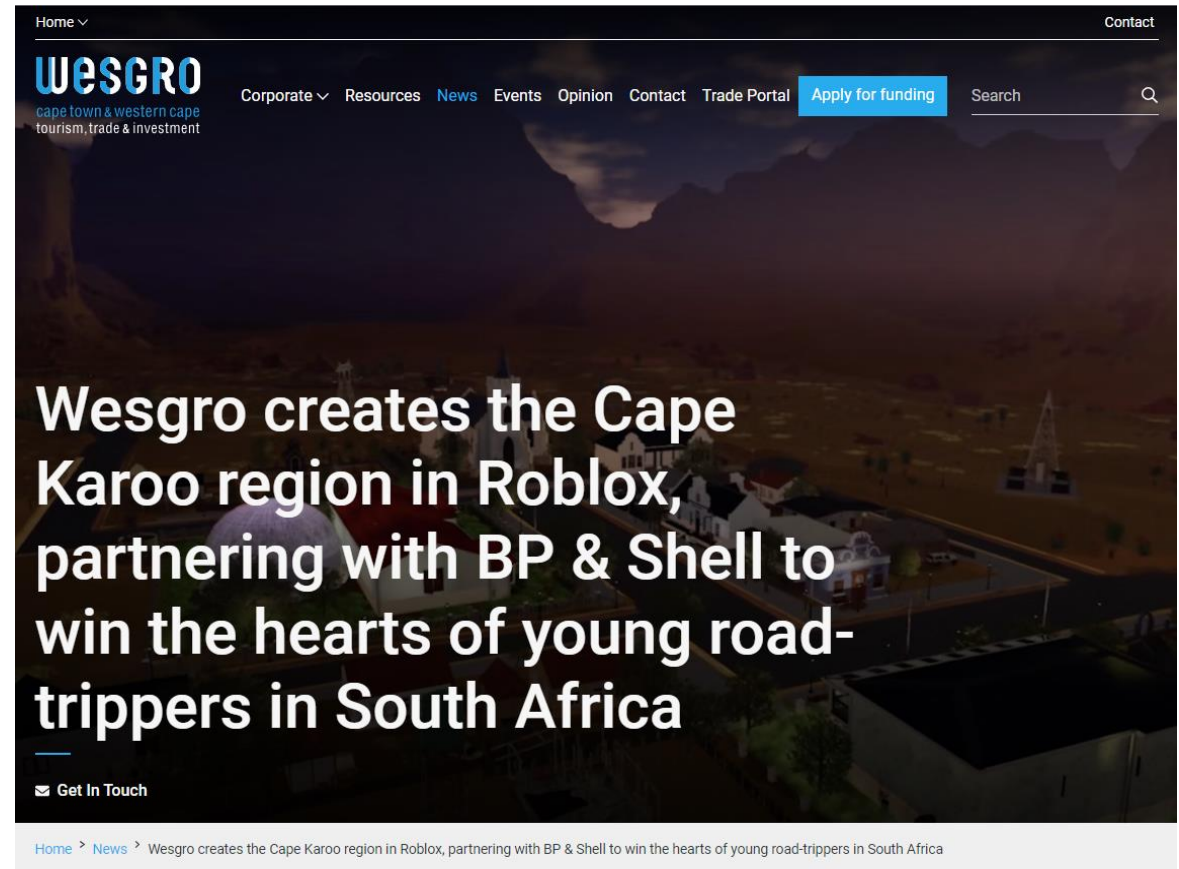
12. Adventure tourism in the Western Cape: Opportunities for growth

Partnership and Stakeholder Engagement

To increase the visibility of tourism experiences in the Western Cape's six regions, it is essential to collaborate with key stakeholders. This collaboration between tourism operators and stakeholders can lead to the creation of unique experiences that are likely to attract potential visitors.

Furthermore, it offers an opportunity to educate people about the importance of sustainable tourism, nature tourism, eco-tourism, nature-based tourism, and adventure tourism

In pursuit of this objective, Wesgro, the official agency responsible for promoting tourism, trade, and investment in Cape Town and the Western Cape, has launched a new game on Roblox called "Starlight Adventures in the Cape Karoo." This game has been created in collaboration with BP, Shell, and Engen, to encourage tweens, teens, and their families to explore the Western Cape during the winter season and boost tourism in the region. The game promises to provide an engaging and fun experience that allows players to explore the Western Cape's natural and cultural beauty while learning about its unique offerings. The initiative is expected to have a positive impact on the tourism industry in the region, generating interest and curiosity among potential visitors, and boosting the Western Cape's reputation as a top tourist destination.



27 June 2023

Source: Wesgro, 2023; The World Bank Group, 2022; UNWTO, 2014

13. Gazing into the future: Marketing and promotion

- To boost the popularity of adventure tourism in the Western Cape region, it is crucial to gain a comprehensive understanding of the various factors that can impact tourists' decisions to participate in adventure tourism experiences. By identifying and analyzing these influential aspects, adventure tourism operators and businesses can develop and offer individually tailored or packaged adventure experiences that cater to the specific needs and preferences of their target audience. Some of the key factors that can influence tourists' decisions to engage in adventure tourism experiences include the following:
 1. Socio-economic background and spending power of potential markets
 2. Cost related to adventure activities or packed adventure experiences
 3. The booking and travel costs (e.g., accommodation, airline tickets)
 4. Marketing that speaks and appeals to tourists' preferences or travel motivations.
- The European region places great importance on creativity, recognizing it as a key driver of innovation and growth. According to Valuegraphics Global Value Guide, creativity is consistently ranked among the top 10 values that Europeans hold dear. This emphasis on creativity can be seen in various aspects of European life, from the arts and culture to business and technology. This presents an opportunity for DMOs and other key stakeholders to craft experiences and marketing experiences that align with these values.
- In North America, there is a strong emphasis on health and well-being. This includes a focus on maintaining healthy eating and proper nutrition, engaging in regular physical activity, and prioritising mental wellness. The Western Cape has evolved into one of the destinations that offer wellness and health tourism experiences.
- Encouraging more travellers to adopt sustainable tourism practices is crucial. Collaboration between stakeholders in the tourism industry is necessary to offer incentives such as altruistic rewards, recognition, and even monetary rewards. These incentives could include discounts or rewards for booking eco-friendly or sustainable accommodation establishments that implement green practices such as recycling, energy conservation, and water management. Additionally, incentivising tourists to buy locally produced products and use public transport can also contribute to responsible tourism. These efforts will not only benefit the environment but also support the local economy and communities.

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Appendix: ROVE Mobile Location Data

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.)

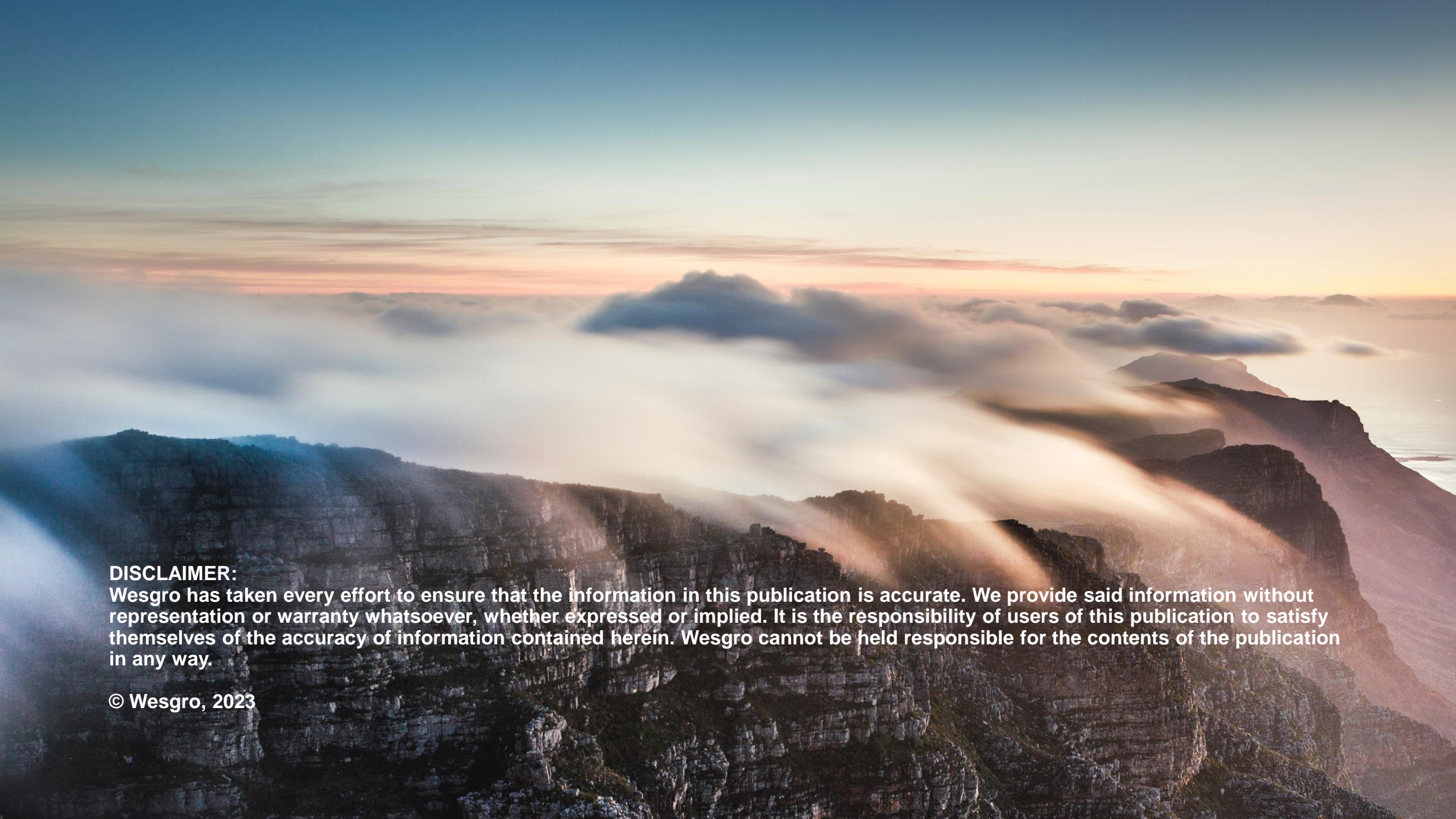
Source: Rove, 2023

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 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 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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