

Key Findings

- Tourism in the Western Cape continues to recover well. In June 2022, passengers through CTIA's international terminal reached a recovery rate of 73% when compared to the same month in 2019.
- Domestic recovery slowed to 62% in June after remaining on 70-80% recovery since the start of the year but passengers through George Airport maintained a recovery rate of 86% when compared to the same month in 2019.
- Year to date (as at April 2022), UK ranked as the top source market to Cape Town (via Air), followed by Germany, USA, Netherlands and France. Europe has regained its position as the Western Cape's top region for tourist arrivals, as 6 out of the top 10 source markets to Cape Town originated from the region. In addition, the UK reached a 98% recovery rate in the month of April 2022 when compared to the same month in 2019.
- Hotel occupancy for the Western Cape stood at 41,4% in June 2022, representing a recovery rate of 82% when compared to 2019. The Average Daily Rate (ADR) for the Western Cape grew to R1, 377.52 and RevPAR (Revenue Per Average Room) reached R570.43. ADR exceeded June 2019 levels, recovering to 107% and RevPAR reached 88% recovery.
- Footfall at 27 participating attractions recorded a total of 275 591 visitors in June 2022, a 89% year-on-year growth in the number of visitors and a recovery rate of 58% when compared to June 2019.
- Based on mobile location data insights of 11 808 domestic and 419 international tourists, the Cape Winelands was the most popular region among domestic visitors while international visitors mainly spent time in Cape Town. On average, domestic visitors spent the longest time in the Weskus (2,2 days), while international visitors spent on average 2,5 days in Garden Route & Klein Karoo and 2,4 days in Cape Town and Cape Overberg, respectively. Garden Route & Klein Karoo ranked as the most popular region for overnight stays among both domestic and international visitors.
- Shopping and markets were the most popular type of attraction visited by both domestic and international tourists. Prominent shopping points included the V&A Waterfront, Willowbridge, Tygervalley, and Hermanus Market Square. Domestic visitors spent on average 2,7 hours shopping while international visitors shopped for 2,8 hours.
- Natural attractions; particularly Cape Point, Table Mountain, Knysna Heads and Hottentots Hollandberge were popular with both domestic and international tourists.
- From a sample size of 93 tourists who visited the Stellenbosch Wine Route, 92% were locals, and 8% domestic tourists. Spier was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht Wine Estates.



CPT DOMESTIC terminal passenger performance

Year/Month	2040	2020	2024	2022				
rear/wonth	2019	2020	2021	Mar	Apr	May	Jun	01-10 Jul
Two-way passengers	8 363 307	3 167 542	4 221 365	556 644	539 049	504 172	407 626	150 410
Passenger recovery*	100%	38%	50%	72%	75%	83%	62%	65%
Average lead faster	700/	649/	670/	Arr 82%	Arr 81%	Arr 75%	Arr 84%	Arr 92%
Average load factor	78%	64%	67%	Dep 84%	Dep 82%	Dep 73%	Dep 91%	Dep 92%

Passenger data source: ACSA

* Passenger recovery compared to same period in 2019

* July 2022 data preliminary

Operating carriers

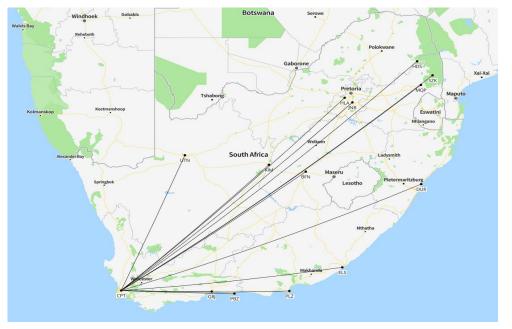














Source: OAG Schedules Analyser

CPT International terminal passenger performance

Year/Month	2040	2020	2024	2022				
Year/Month 2019 2020	2020	2021	Mar	Apr	May	Jun	01-10 Jul	
Two-way passengers	2 606 398	810 811	525 441	161 064	156 933	119 729	124 783	49 644
Passenger recovery*	100%	31%	20%	61%	76%	74%	73%	86%
Average lead factor	000/	630/	460/	Arr 71%	Arr 77%	Arr 60%	Arr 63%	Arr 83%
Average load factor	erage load factor 82% 63%	46%	Dep 82%	Dep 83%	Dep 75%	Dep 81%	Dep 77%	

Passenger data source: ACSA

Operating carriers

































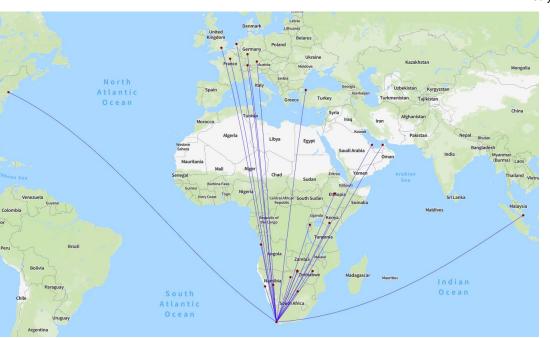






* Passenger recovery compared to same period in 2019

* July 2022 data preliminary



George Airport (GRJ) passenger performance

Voor/Month	2019	2020	2021	2022				
Year/Month				Mar	Apr	May	Jun	01-10 Jul
Two-way passengers	832 981	340 438	536 886	70 528	72 678	61 290	56 116	18 261
Passenger recovery*	100%	41%	64%	97%	109%	97%	86%	88%

Passenger data source: ACSA

* Passenger recovery compared to same period in 2019

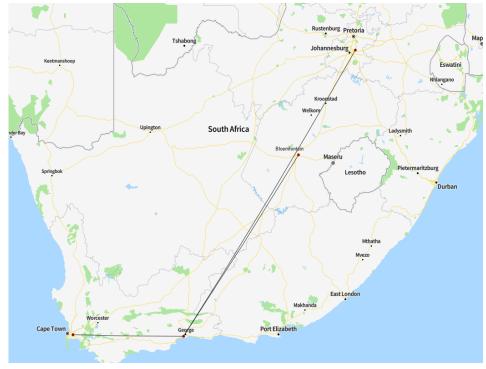
* July 2022 data preliminary

Operating carriers









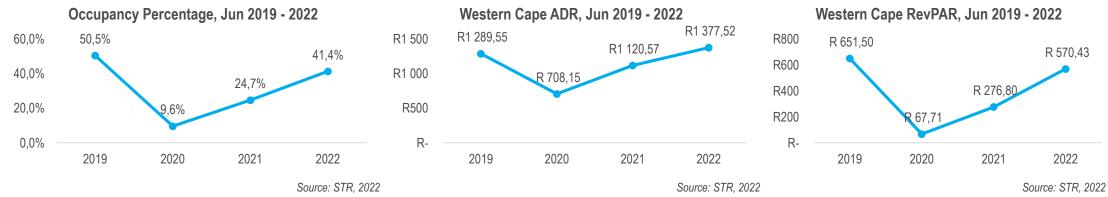


Source: OAG Schedules Analyser

An Inspiring Place To Do Business

4. Hotel Occupancy in the Western Cape

- Occupancy in the Western Cape, at 41.4% in June 2022, more than doubled when compared to 24.7% in the same month in 2021, reaching a recovery rate of 82% when compared to the 50.5% occupancy in June 2019.
- The Average Daily Rate (ADR) for the Western Cape grew to R1, 377.52 in June 2022 with a recovery rate of 107% of its 2019 figure.
- At R 570.43 in June 2022, RevPAR (Revenue Per Average Room) more than doubled on its 2021 figure and recovered to 88% of what it was in June 2019.

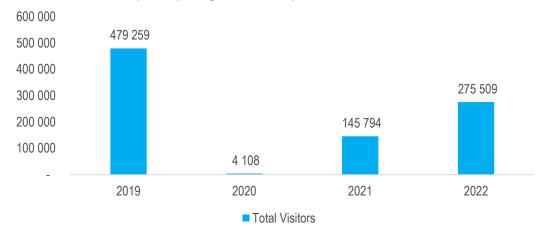




5. Western Cape Attractions

- Visitors to the 27 participating attractions across the province recorded a
 total of 275 509 visitors in June 2022, a 89% growth in the number of
 visitors when compared to the same month last year and 57% of what it
 was in June 2019.
- The top 5 highest year-on-year growth rates were recorded for Shipwreck Museum (+1758%), Robben Island (+347%), Cango Caves (+267%), Table Mountain: Boulders (+206%), and Table Mountain: Aerial Cableway (+205%).

Visitors to participating Western Cape Attractions, Jun 2019 - 2022





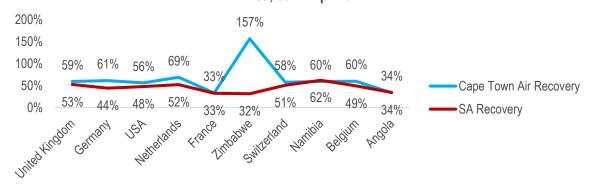
Attractions	Jun 2021/2022 % Change	Jun 2019/2022 Recovery %
Cape Town		
Table Mountain National Park	+126%	57%
Table Mountain National Park: Boulders	+206%	52%
Table Mountain National Park: Cape of	E 40/	5.40/
Good Hope	+51%	54%
Table Mountain Aerial Cableway	+205%	59%
Kirstenbosch National Botanical Garden	+22%	68%
Robben Island	+347%	62%
Cape Overberg		
Cape Agulhas Lighthouse	-2%	35%
Agulhas National Park	+11%	41%
Bontebok National Park	-6%	50%
De Hoop Nature Reserve	+13%	193%
De Mond Nature Reserve	+12%	63%
Harold Porter National Botanical Garden	+21%	76%
Koggelberg Nature Reserve	+150%	202%
Stony Point	+6%	47%
Shipwreck Museum	+1758%	68%
Garden Route & Klein Karoo		
Cango Caves	+267%	50%
Wilderness National Park	-8%	64%
Tsitsikamma National Park	+37%	58%
Knysna National Park	+40%	75%
Weskus		
West Coast National Park	-17%	43%
!Khwattu	+26%	80%
Old Jail	+41%	49%
Cape Karoo		
Karoo National Park	+9%	63%
Cape Winelands		
Avalon Springs (day visitors)		ovations (June 2022)
Protea Tractor Trip	+94%	113%
Birds Paradise	+19%	37%
Viljoensdrift River Cruises	+29%	65% An Inspiring Place To Do Busino

Source: SANParks, LTO's, and Attractions, 2022

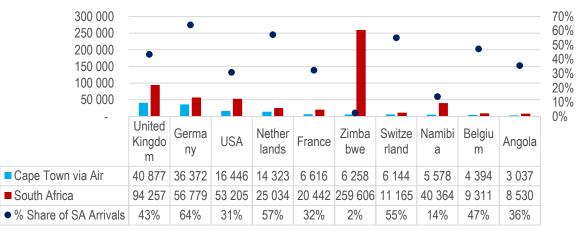
6. Top International Source Markets to Cape Town

- Year-to-date (as at April 2022), the top source market to Cape Town via Air was the UK, followed by Germany, USA, Netherlands, and France.
- Tourist arrivals from the UK grew from 1 511 during the first 4 months last year to 40 877 over the same period in 2022 and recovered to 59% of what it was in 2019.
- The **Netherlands** with 14 323 tourist arrivals, **recovered to 69%** and **Germany** (36 372 tourist arrivals) **had a recovery rate of 61%** on Jan Apr 2019.
- USA (16 446 tourist arrivals) recovered to more than half of its Jan
 Apr 2019 figure, and France (6 616 tourist arrivals) recovered to a third.
- Zimbabwe (6 258 tourist arrivals) led as the top source market from the African continent, followed by Namibia with 5 578 tourist arrivals. Among the top ten list, Zimbabwe was the only country that reached and exceeded pre-pandemic levels (157% recovery rate).
- Cape Town held the largest share (64%) of German tourists who travelled to South Africa in the first four months of 2022, followed by Netherlands (57%).

Recovery in Top 10 Source Markets to Cape Town (via Air) and South Africa, Jan - Apr 2022



Top 10 Source Markets to Cape Town (via Air) and South Africa, Jan - Apr 2019/2022





Source: StatsSA, 2022

Visitor Trends Mobile Location Data Insights



8. Western Cape Mobile Location Data Insights

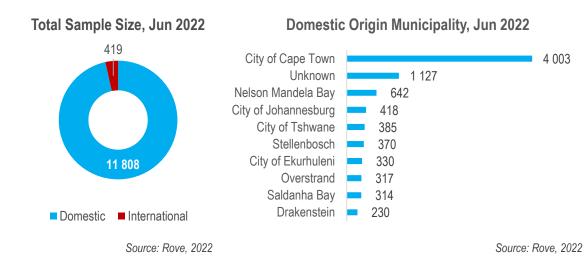
What is mobile location data?

- 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.

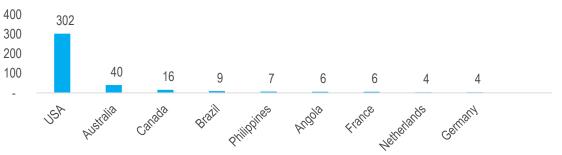
Why use mobile location data insights?

- 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 **11 808 domestic** and **419 international** tourists who visited the Western Cape in June 2022. Within the domestic data set, just over a third of the sampled tourists were from the City of Cape Town and from the international sampled tourists, 302 were from the USA.







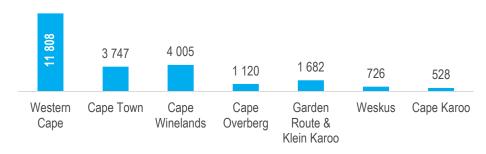


8.1. Mobile Insights: Domestic Visitor Trends

 In June 2022, the Cape Winelands (34%) and Cape Town (32%) saw the most domestic visitors in terms of volume of sample size and Cape Karoo (4%) had the least.

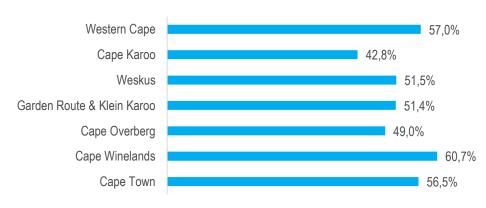
• The Cape Winelands (60,7%) was the most popular region for repeat visits, followed by the Cape Town (56,5%). The Cape Winelands had a slightly higher repeater rate than the general average for the province (57%).

Domestic Sample Size, Jun 2022



Source: Rove, 2022

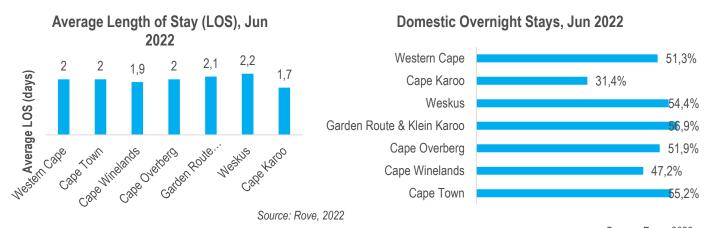
Domestic Repeat Visitors in Jun 2022



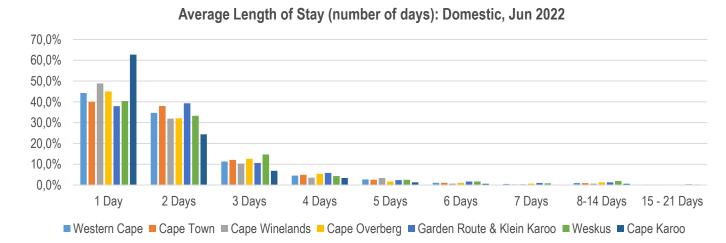


8.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic visitors spent the longest time in the Weskus (2,2 days) and the shortest time in the Cape Karoo (1,7 days).
- More than half of sampled tourists stayed overnight in the Garden Route & Klein Karoo, Weskus and Cape Town at a slightly higher rate than the general average for the province (51,3%). In contrast, visitors to the Cape Karoo were more likely to stay for the day.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



Source: Rove, 2022

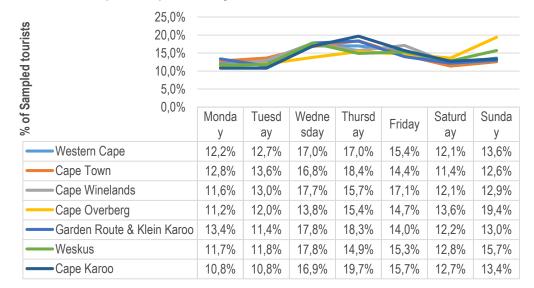




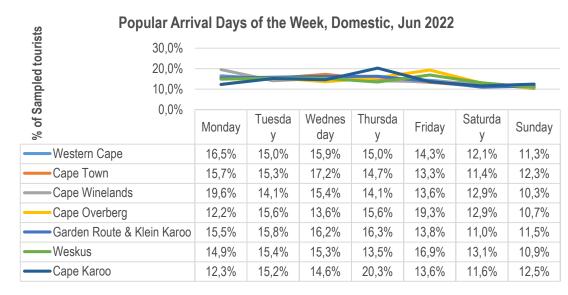
8.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the province were most likely to arrive on a Monday and depart on a Wednesday or Thursday.
- In the Cape Winelands, Monday was the most popular arrival day and Wednesday was the most common day for departure in June 2022.
- Wednesday and Thursday were the most popular days for both arrival and departure in the Garden Route & Klein Karoo.

Popular Departure Days of the Week, Domestic, Jun 2022



Source: Rove, 2022



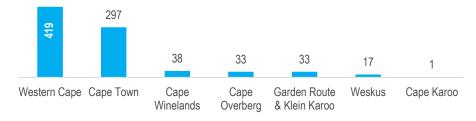
- In the Cape Karoo, which saw majority day visitors, Thursday was the most popular day for arrival and departure.
- Cape Town arrival days were most common on Wednesday and departure was most popular on Thursday.
- Friday was the most popular arrival day in the Cape Overberg and Sunday was its most common departure day.
- In the Weskus, Friday and Tuesday were the most popular arrival days and Wednesday and Sunday were the most popular days for departure.



8.2. Mobile Insights: International Visitor Trends

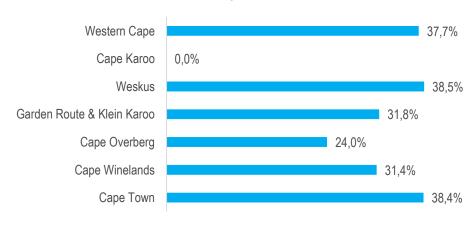
- Nearly three quarters of the sampled international tourists visited Cape Town (297) followed by Cape Winelands (38).
- Visitor trends for the Cape Karoo is based on a sample size of only 1 international tourist and therefore not an accurate statistical representation for the region.
- Cape Town, Weskus and the Garden Route & Klein Karoo saw the most international repeat visitors in June 2022

International Sample Size, Jun 2022



Source: Rove, 2022

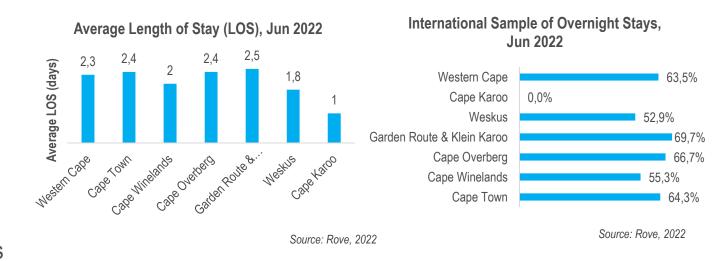
International Repeat Visits, Jun 2022

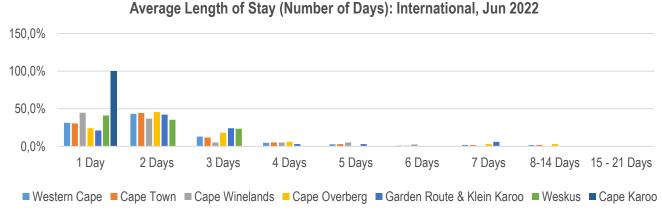




8.2. Mobile Insights: International Visitor Trends

- On average, international visitors spent the longest time in the Garden Route & Klein Karoo (2,5 days) followed by Cape Town (2,4 days).
- Around two thirds of sampled tourists stayed overnight in the Garden Route & Klein Karoo as well as Cape Overberg and Cape Town, which is slightly higher than the general average for the province (63,5%).
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

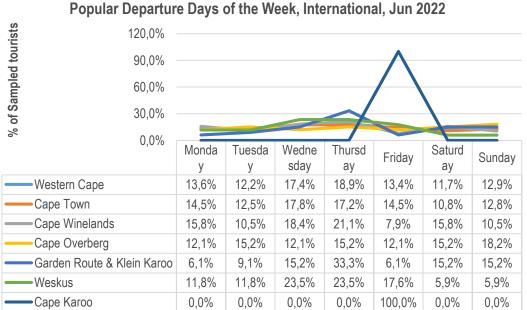




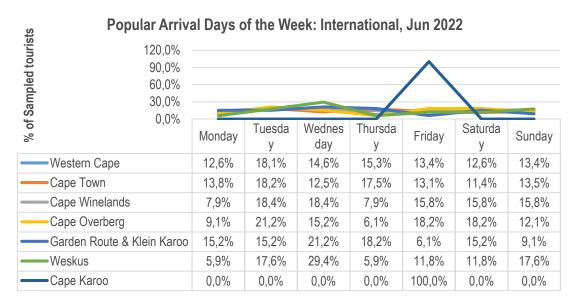


8.2. Mobile Insights: International Visitor Trends

- International visitors to the province were most likely to arrive on a Tuesday or Thursday and depart on Wednesday or Thursday.
- In the Cape Winelands, Tuesday and Wednesday were the most popular arrival days and Thursday the most popular departure day.
- International visitors to the Garden Route & Klein Karoo arrived mostly on a Wednesday and departed on a Thursday.



Source: Rove, 2022

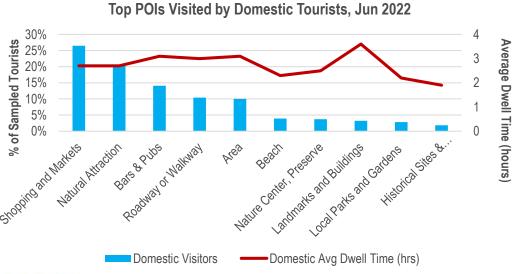


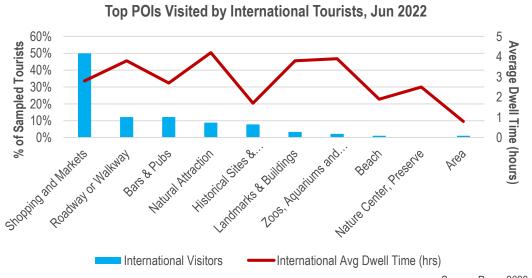
- The sampled visitor in the Cape Karoo, arrived and departed on a Friday.
- Cape Town arrival days were most common on Tuesday and Thursday and departure was most popular on Wednesday and Thursday.
- Tuesday was the most popular arrival day in the Cape Overberg and Sunday was the most common departure day.
- In the Weskus, Wednesday was the most popular arrival days and Wednesday and Thursday were common departure days.



8.3. Points of Interest (POIs) Visited

- Shopping and markets was the most popular type of attraction visited for both domestic and international tourists.
- Domestic visitors spent on average 2,7 hours shopping while international visitors shopped for 2,8 hours.
- Natural attractions, particularly Table Mountain and Cape Point were popular with both domestic and international tourists and domestic visitors spent a lot of time at Knysna Waterfront as well.
- Bars & Pubs in the city centre were the third most popular point of interest for both domestic and international tourists who spent on average 3,1 hours and 2,7 hours at the location, respectively.
- Roadways & walkways, which include Stanford Valley, Sea Point Promenade, Hemel-en-Aarde Valley, Clarence Drive and Ashton Bridge, ranked second
 among the top POIs visited by international tourists, with an average dwell time of 3,8 hours.





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

8.3. Points of Interest (POIs) Visited

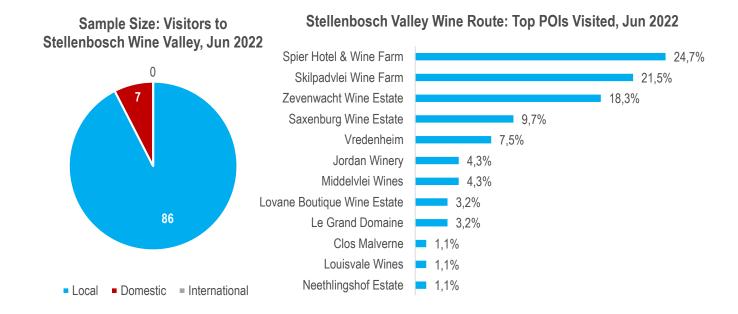
• Similar to domestic tourist trends, shopping and markets, natural attractions and bars and pubs, ranked as the top three points of interests for local visitors. Locals spent on average 2,5 hours at shops and markets, 2,9 hours at natural attractions and 3,2 hours at bars and pubs.



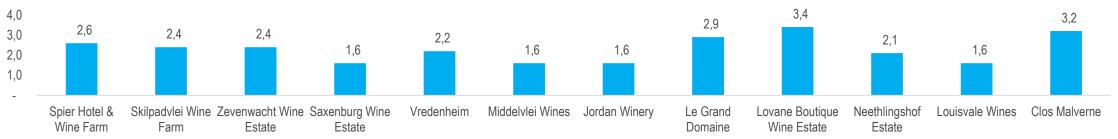


8.4. Stellenbosch Valley Wine Route

- From a sample size of 93 tourists who visited the Stellenbosch Wine Route over 90% were locals and 9% domestic.
- Spier was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht Wine Estates.
- Lovane Boutique Wine Estate (3,4 hours) and Clos Malverne (3,2 hours) had the longest dwell time.



Stellenbosch Wine Valley Route: Average Hours Spent at POIs, Jun 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.)



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
- 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:

- 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
- Minimum duration of visit of 45 minutes excludes commuters driving through each city

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



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 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.



