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1. Key Findings

The Western Cape enjoyed a bumper festive season that continued into the month of January 2023. On the back of a positive recovery in 2022, the province can look forward to even more aviation and tourism growth in 2023. Key highlights of the overall tourism performance in January 2023 are outlined below.

- 515,017 domestic two-way passengers passed through Cape Town International Airport (CTIA) during January 2023; registering a 74% recovery vs. January 2019.
- International two-way passengers through CTIA reached 280,430 in January 2023; and nearly fully recovered against January 2019, reaching 97%.
- George Airport recorded 63,367 two-way passengers in January 2023 and recovered by 84% when compared to the performance in January 2019.
- In January 2023, Cape Town recorded a total of 98,260 tourist arrivals via air, of which 93% originated from overseas markets and 7% from the African continent. For the month of January 2023, Cape Town recorded the highest number in tourist arrivals from overseas markets (91,563) amongst South Africa's three key airports; Cape Town International Airport, OR Tambo and King Shaka (StatsSA data).
- Across the same period, the United Kingdom led as the top source market to Cape Town (via air), closely followed by Germany, USA, Netherlands and France, ranking in the top 5 positions. The European market is recovering remarkably well with 7 out of the top 10 source markets to Cape Town originating from the continent.
- With the exception of France (76% recovery) and Switzerland (84% recovery), 8 out of the top 10 source markets to Cape Town (via air) fully recovered in January 2023 vs. January 2019. These markets included the UK (106%), Germany (112%), USA (168%), Netherlands (124%), Canada (108%), Italy (115%), Belgium (106%) and Zimbabwe (131%).
- Footfall to 20 participating attractions across the six regions of the Western Cape recorded a total of 672,504 visitors in January 2023, a 76% year-on-year growth in the number of visitors when compared to January 2022 and 83% of what it was in January 2019.
- The top 5 highest year-on-year growth rates in January 2023 were recorded for Table Mountain National Park: Cape of Good Hope (161%), Table Mountain National Park: Boulders (126%), Robben Island (113%), Table Mountain Aerial Cableway (89%) and Table Mountain National Park (83%).



2. CPT INTERNATIONAL Terminal Passenger Performance

Year/Month	2019	2020	2021	2022			2022 month	n e	2023
rear/Month	2019	2020	2021	2022	2022		Nov	Dec	Jan
Two-way passengers	2 606 398	810 811	525 441	1 895 975		175 648	211 944	270 433	280 430
Passenger recovery*	100%	31%	20%	73%		83%	84%	96%	97%

^{*} Recovery compared to same period in 2019

Passenger data source: ACSA

Operating carriers



















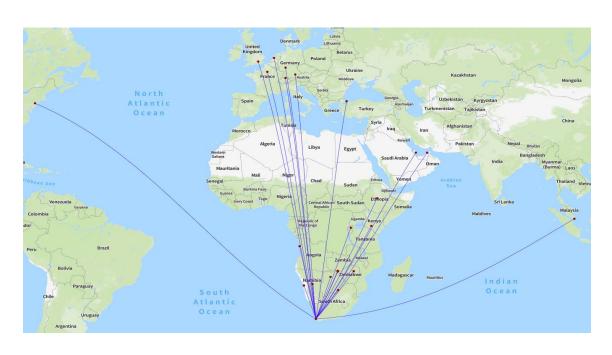














3. CPT DOMESTIC Terminal Passenger Performance

Year/Month	2019	2020	2021	2022	2022 month				2023
rear/ivioritii	2019	2020	2021	2022	Oct	Nov	Dec		Jan
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	528 817	510 108	569 693		515 017
Passenger recovery*	100%	38%	50%	71%	73%	73%	72%		74%

^{*} Recovery compared to same period in 2019

Passenger data source: ACSA

Operating carriers

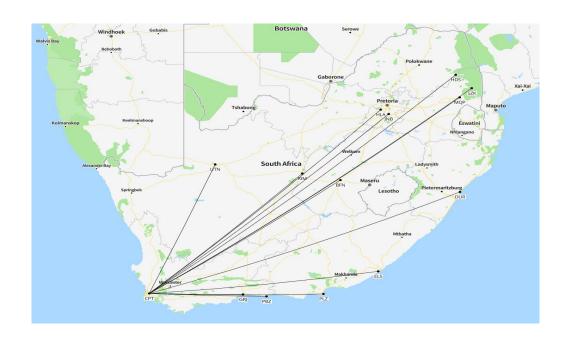














4. George Airport (GRJ) Passenger Performance

					2022		2023	
Year/Month	2019	2020	2021	2022	Oct	Nov	Dec	Jan
Two-way passengers	832 981	340 438	536 886	740 990	63 922	59 518	63 399	63 367
Passenger recovery*	100%	41%	64%	89%	90%	84%	65%	84%

^{*} Recovery compared to same period in 2019

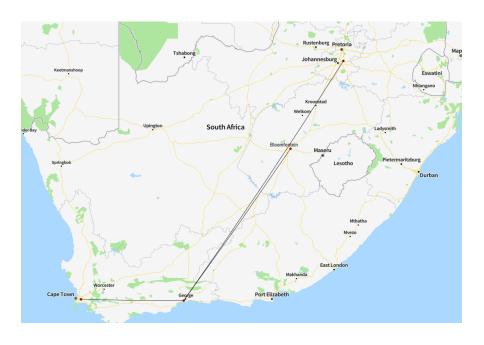
Passenger data source: ACSA

Operating carriers











5. Cape Town Route and Airline Update

CPT International route and airline update – 15 February 2023

21 airlines, 27 destinations, 199 flights per week

Asia and Middle East



Emirates, DXB-CPT, double daily since 6 Feb



Qatar Airways, double daily since 6 Jan, DOH-CPT



Singapore Airlines daily service, SIN-JNB-CPT-JNB-

Rest of Africa



Air Botswana, Gaborone (GBE), three times per week



Ethiopian Airlines, Addis Ababa (ADD), daily flight, 4 additional flights from 26 March





FlyNamibia, Windhoek (WDH), six times per week



Kenva Airways, Nairobi (NBO) direct, twice per week. Nairobi - Livingstone (LVI), twice per week and Nairobi - Victoria Falls (VFA), three per week







RwandAir, Kigali (KGL)-Harare (HRE), six times per



& AIRLINK .

Airlink. Windhoek, three times a day Walvis Bay (WVB), daily

Harare, daily Victoria Falls, six times per week

Maun (MUB), daily Maputo (MPM), four times per week

Air Mauritius, (MRU) - Mauritius, twice per week, restarting 19 March

Europe



Lufthansa, Frankfurt (FRA), three times per week Munich (MUC), seasonal daily flight



British Airways, London Heathrow (LHR) double daily service. Seasonal London Gatwick (LGW) service three times per week.



KLM, Amsterdam (AMS), operates 10 times per week



Turkish Airlines, Istanbul, Daily flight



Edelweiss, Seasonal Zurich (ZRH), three times a week



Air Belgium, Year-round - Brussels BRU-JNB-CPT-JNB-BRU, twice per week



Condor, Seasonal Frankfurt (FRA) service, three times a week.



Virgin Atlantic, London Heathrow, daily seasonal service



Air France, Paris (CDG), seasonal service three times per week

North America



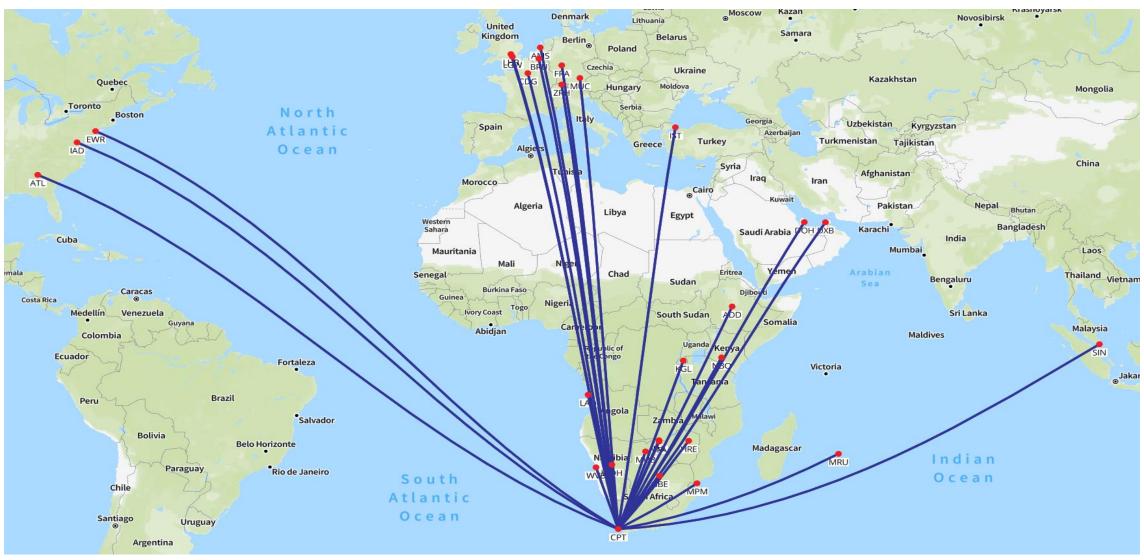
United Airlines, Newark (EWR), year-round service, three times per week. Washington D.C (IAD) year-round service, three times per week



Delta Air Lines, Atlanta (ATL) direct service, three times a week. Seasonal triangular route between ATL-JNB-CPT-ATL four times a week



6. IATA Winter Season Route Network (Nov 2022 - Mar 2023





7. Performance of Air Arrivals to Cape Town: Jan 2023

• In the month of **January 2023**, Cape Town recorded a total of 98,260 tourist arrivals via air, of which 93% originated from overseas markets and 7% from the African continent. In January 2023, Cape Town welcomed the largest share of overseas tourist arrivals (91,563) across South Africa's three key airports identified below.

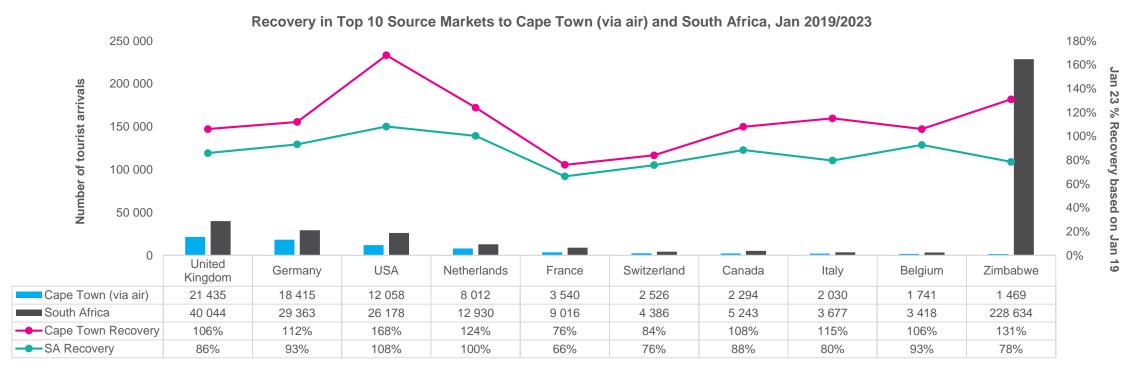
TOURIST ARRIVALS TO SOUTH AFRICA BY AIRPORT, JANUARY 2023						
Source Market	Cape Town	OR Tambo	King Shaka			
Overseas Tourist Arrivals	91 563	76 978	1 696			
Africa Tourist Arrivals	6 605	35 006	218			
Total Tourist Arrivals	98 260	112 419	1 916			
Overseas % Share of Total Tourists	93%	68%	89%			

Source: StatsSA, 2023



8. Top Source Markets to Cape Town (via air): Jan 2023

- In the month of January 2023, the United Kingdom led as the top source market to Cape Town (via air), closely followed by Germany, USA, Netherlands and France in the top 5 positions. The European market is recovering remarkably well with 7 out of the top 10 source markets to Cape Town originating from the continent.
- With the exception of France (76% recovery) and Switzerland (84% recovery), 8 out of the top 10 source markets to Cape Town fully recovered in January 2023 against 2019 levels. These markets included the UK (106%), Germany (112%), USA (168%), Netherlands (124%), Canada (108%), Italy (115%), Belgium (106%) and Zimbabwe (131%).



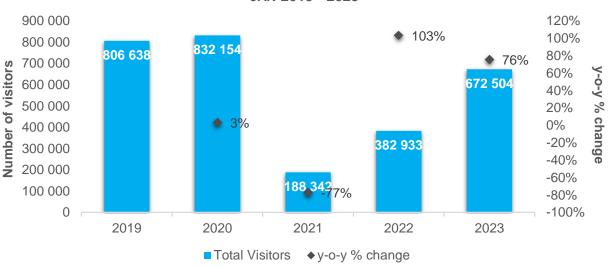


Source: StatsSA, 2023

9. Western Cape Attractions

- Footfall to 20 participating attractions across the six regions of the Western Cape recorded a total of 672,504 visitors in January 2023, a 76% growth in the number of visitors when compared to January 2022 and 83% of what it was in January 2019.
- The top 5 highest year-on-year growth rates in January 2023 were recorded for Table Mountain National Park: Cape of Good Hope (161%), Table Mountain National Park: Boulders (126%), Robben Island (113%), Table Mountain Aerial Cableway (89%) and Table Mountain National Park (83%).

VISITORS TO PARTICIPATING WESTERN CAPE ATTRACTIONS, JAN 2019 - 2023



Western Cape Attractions	Jan 2022/2023 % Change	Jan 2019/2023 % Recovery
Cape Town		
Table Mountain Aerial Cableway	89%	93%
Table Mountain National Park	83%	81%
Table Mountain National Park: Boulders	126%	81%
Table Mountain National Park: Cape of Good Hope	161%	80%
Robben Island	113%	92%
Overberg		
Agulhas National Park	27%	105%
Bontebok National Park	3%	82%
De Mond Nature Reserve	-3%	104%
Kogelberg Nature Reserve	50%	604%
Stony Point	2%	106%
Shipwreck Museum	-37%	46%
Tsitsikamma National Park	19%	85%
Wilderness National Park	-9%	78%
Knysna National Park	-7%	121%
Weskus		
West Coast National Park	-15%	65%
!Khwa ttu	23%	134%
Winelands		
Protea Tractor Trips	-9%	80%
Birds Paradise	45%	124%
Viljoensdrift River Cruise	-40%	87%
Cape Karoo		
Karoo National Park	-9%	105%

Sources: LTO's, and Attractions, 2023



Visitor Trends Mobile Location Data Insights



10. Western Cape Mobile Location Data Insights

Source: Rove. 2023

What is mobile location data?

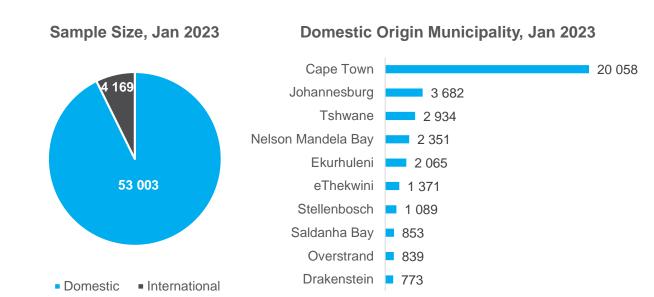
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can "opt in" to location sharing (or choose not to "opt in"). When they 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 **53,003 domestic** and **4,169 international** tourists who visited the Western Cape in January 2023. Within the domestic data set, **20,058** of the sampled tourists were from the City of Cape Town and from the international sampled tourists, **855** were from the United Kingdom and **802** from the United States.

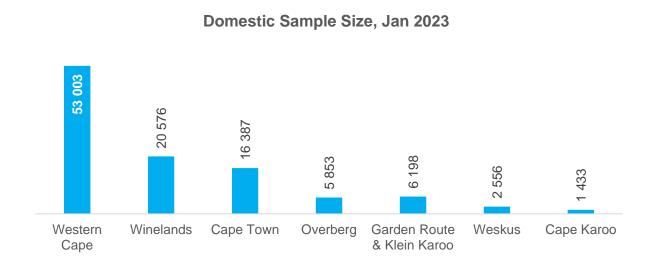


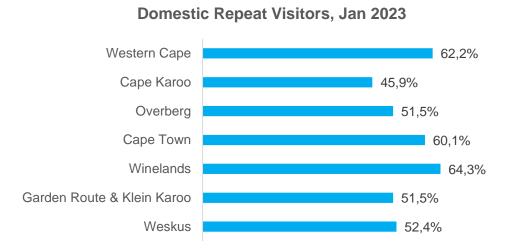




10.1. Mobile Insights: Domestic Visitor Trends

- In January 2023, **Winelands (38,8%) and Cape Town (30,9%)** saw the most domestic tourists in terms of volume of sample size and Cape Karoo (2,7%) had the least.
- Winelands (64,3%) was the most popular region for domestic repeat visits, followed by Cape Town (60,1%).

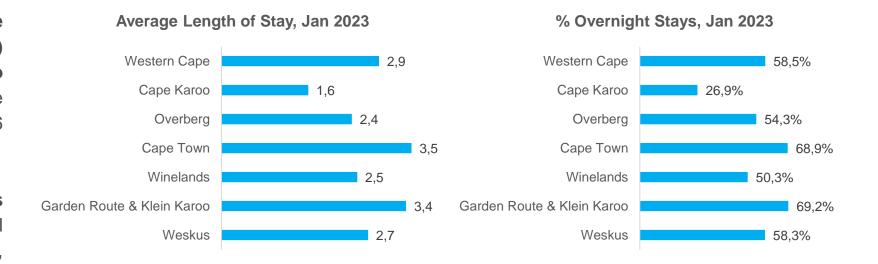


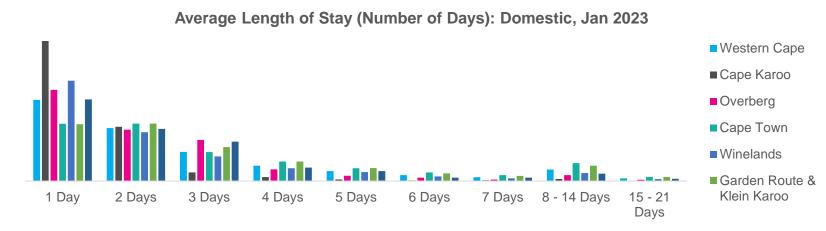




10.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic tourists spent the longest time in Cape Town (3,5 days) and the Garden Route & Klein Karoo (3,4 days) during January 2023, and the shortest time in the Cape Karoo (1,6 days).
- Close to 70% of sampled tourists stayed overnight in Cape Town as well as in the Garden Route & Klein Karoo, and at a slightly higher rate than the general average for the province (58,5%).
- In contrast, domestic tourists to the Cape Karoo were more likely to stay for the day.







10.1. Mobile Insights: Domestic Visitor Trends

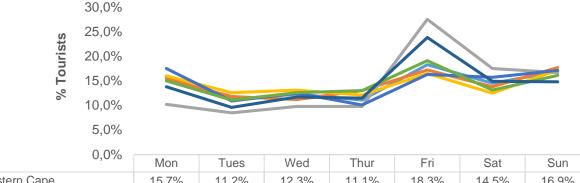
- Domestic tourists to the province were most likely to arrive on a Friday and depart on a Sunday, pointing to the popularity in weekend stays.
- In the Winelands, a Monday or Sunday were the most popular arrival and departure days amongst tourists to the region.
- Tourists to the Garden Route & Klein Karoo generally arrived on a Friday and departed on a Sunday or Monday.

Popular Departure Days of the Week: Domestic, Jan 2023



0,0%	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Western Cape	21,3%	12,6%	9,4%	9,0%	13,8%	12,2%	21,8%
——Cape Karoo	16,5%	12,5%	10,7%	11,3%	15,5%	14,0%	19,5%
Overberg	14,6%	9,1%	8,3%	8,2%	11,3%	13,3%	35,2%
——Cape Town	25,6%	15,4%	9,9%	8,9%	12,8%	10,0%	17,4%
	20,3%	11,0%	9,2%	8,9%	15,8%	14,2%	20,6%
——Garden Route & Klein Karoo	22,6%	13,7%	9,0%	9,5%	12,4%	10,1%	22,6%
Weskus	16,2%	11,9%	9,7%	9,4%	12,6%	12,3%	28,0%

Popular Arrival Days of the Week: Domestic, Jan 2023



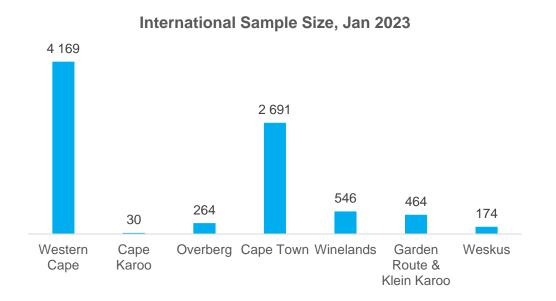
0,0%	Mon	Tues	Wed	Thur	Fri	Sat	Sun
	15,7%	11,2%	12,3%	11,1%	18,3%	14,5%	16,9%
——Cape Karoo	15,4%	11,8%	11,2%	13,0%	17,2%	13,8%	17,7%
Overberg	10,2%	8,5%	9,8%	9,8%	27,5%	17,5%	16,7%
——Cape Town	16,0%	12,6%	13,1%	12,1%	16,5%	12,5%	17,2%
	17,5%	10,9%	12,5%	10,1%	16,3%	15,7%	17,1%
——Garden Route & Klein Karoo	15,0%	11,1%	12,6%	13,0%	19,1%	13,1%	16,1%
Weskus	13,8%	9,6%	11,7%	11,5%	23,8%	14,9%	14,8%

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

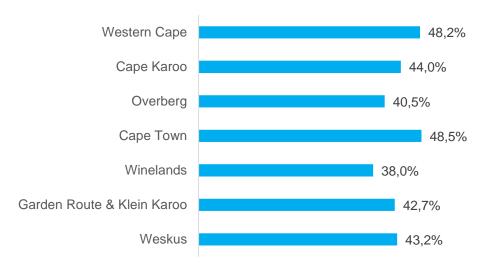


10.2. Mobile Insights: International Visitor Trends

- Nearly 65% of the sampled international tourists visited Cape Town followed by 13% who visited the Winelands.
- Visitor trends for the Cape Karoo is based on a sample size of only 30 international tourists and therefore does not provide an accurate statistical representation for the region.
- Cape Town (48,5%) saw the most international repeat visitors in January 2023.



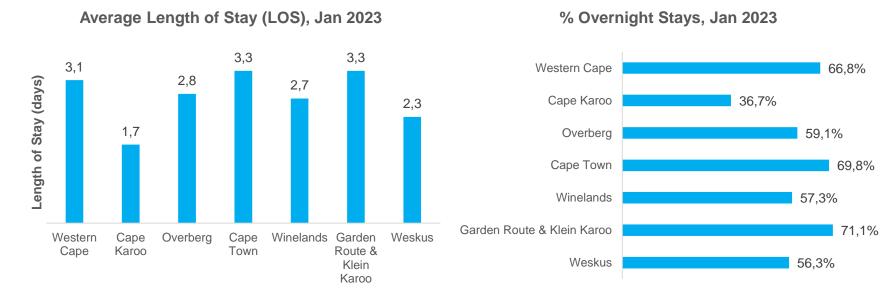
International Tourists Repeat Visits, Jan 2023



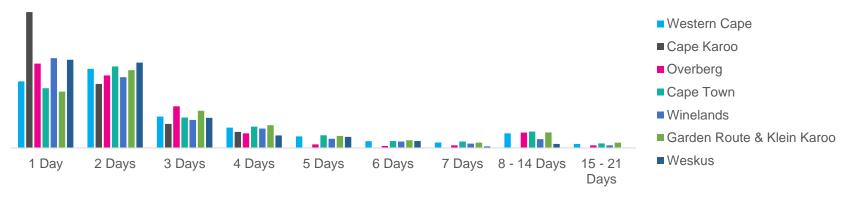


10.2. Mobile Insights: International Visitor Trends

- International tourists spent the longest time in Cape Town (3,3 days) and Garden Route & Klein Karoo (3,3 days).
- Over 70% of sampled tourists stayed overnight in the Garden Route & Klein Karoo and close to 70% stayed overnight in Cape Town.
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.









Source: Rove, 2023
An Inspiring Place To Do Business

10.2. Mobile Insights: International Visitor Trends

- During January 2023, international tourists to the province mainly arrived and departed on a Monday.
- In the Winelands, a Monday was the most popular arrival day and Sunday the most common day for departures.
- International tourists to the Garden Route & Klein Karoo arrived mostly on a Monday and departed on a Tuesday.

Popular Departure Days of the Week: International, Jan 2023 30,0% 25,0% % Tourists 20,0% 15,0% 10,0% 5,0% 0.0% Mon Tues Wed Thur Sun Western Cape 19.9% 16.7% 10.8% 11.4% 14.1% 11,5% 15,7% ■ Cape Karoo 6,7% 23.3% 6.7% 23.3% 13.3% 6,7% 20.0% Overberg 20.5% 15.2% 9.1% 8.7% 14.0% 8.7% 23.9% ■Cape Town 20,8% 17,1% 10,8% 11,6% 13,7% 12,1% 13,8% 14,1% 12,5% 11,0% 17,9% Winelands 17,8% 15,4% 11,4% ■Garden Route & Klein Karoo 17,2% 18,3% 18,8% 9,9% 11,9% 15,1% 8,8% 14,9% 20,7% ■ Weskus 17,8% 10,9% 9,8% 12,1% 13,8%



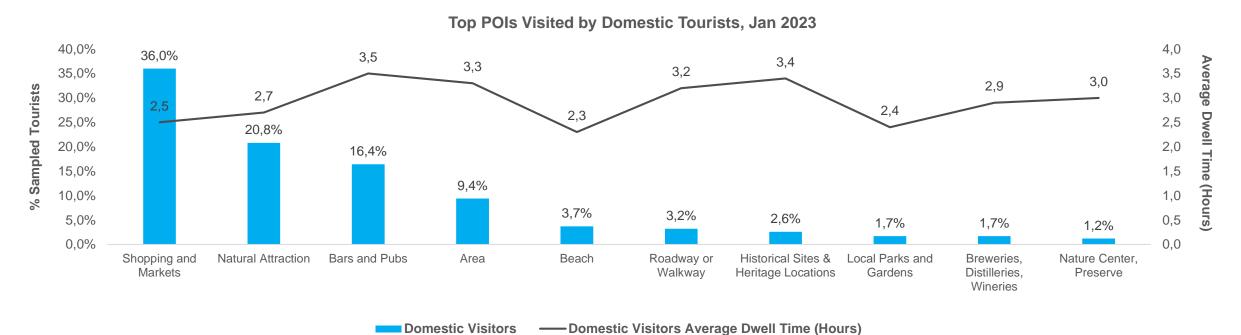


- The sampled tourists (30) in the Cape Karoo, arrived on a Monday or Tuesday and departed on either a Tuesday or Thursday.
- Cape Town arrival day was most common on a Sunday or Monday and departure was most popular on a Monday.
- Sunday was the most popular arrival and departure day in the Overberg.
- In the Weskus, Friday was popular for arrival and departure was most common on a Sunday.



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

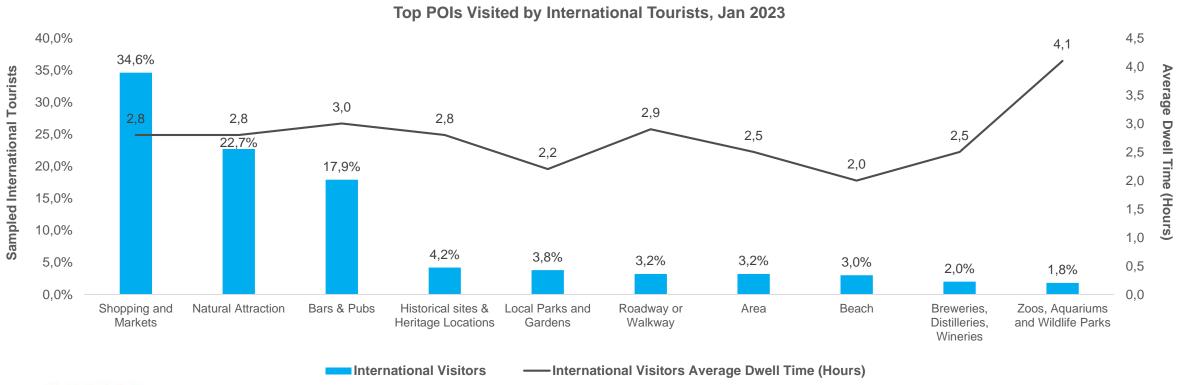
- Shopping and markets was the most popular type of attraction visited by domestic tourists with an average dwell time of 2.5 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront were popular among domestic tourists. On average, domestic visitors spent the longest time at Cape Point and Knysna Waterfront with a dwell time of 2,9 hours each.
- Bars & Pubs were the third most popular point of interest and domestic tourists spent on average 3.5 hours at the location.
- Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked fourth among the top POIs visited by domestic tourists, with an average dwell time of 3.3 hours.





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

- Shopping and markets was the most popular type of attraction visited by international tourists and they shopped on average for 2.8 hours.
- Natural attractions, particularly Table Mountain, Cape Point and Knysna Waterfront were among the top with international tourists.
- Bars & Pubs were the third most popular point of interest for international tourists who spent on average 3.0 hours at the location.
- Among the top 10 POIs visited, international tourists spent the longest time at zoos, aquariums and wildlife parks (4.1 hours).

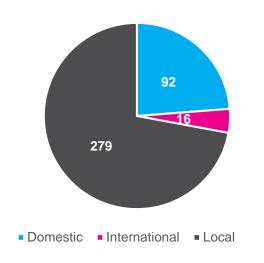




10.4. Stellenbosch Valley Wine Route

- From a sample size of 387 tourists who visited the Stellenbosch Wine Route, 72% were locals, 24% domestic and 4% were international.
- Spier was the most visited farm on the route, followed by Skilpadvlei and Zevenwacht Wine Estates.
- With respect to the average hours spent at the Wine Estates, Lovane Boutique Wine Estate (4,1 hours) reflected the longest dwell time in January 2023.

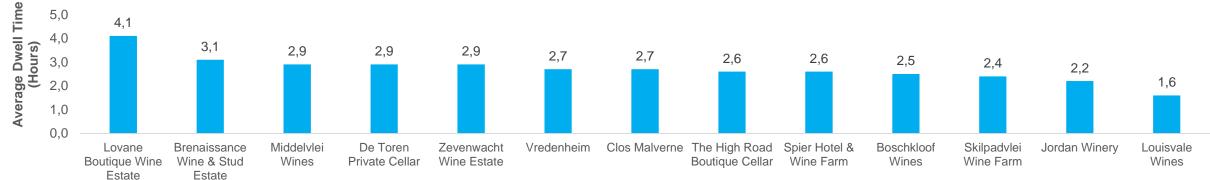




Stellenbosch Wine Valley Route: Top POIs Visited, Jan 2023



Stellenbosch Wine Valley Route: Average Hours Spent at POIs, Jan 2023





Mobile Tourists and Non-Tourists Definitions

About Mobile Location Data

- Privacy compliant data is collected from location enabled apps on mobile devices. Data collected when those location enabled mobile devices entered our geo fenced area
- Data is collected through applications (news, weather, games, texting apps, traffic, etc)
 - Year over year numbers could be skewed by increase app penetration and data privacy settings/policies.
 - Exception with China which does not share data...
- Think of mobile data like survey data on steroids.
 - A sample size greater than 30 yields a 95% level of confidence.
 - This may be the largest sample size of data pertaining to visitors•
- Should not be compared to visitation data.
- Many factors impact total sample size
 - Number of app partnerships
 - Usage of apps
 - App developer policies
 - Volume of visitors

Who Are Tourists vs Non-Tourists?

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



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

Secondary Study Geography	Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.

Notes and Considerations:

- · Residents of a city are not counted as a tourist of the city
- Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon

Point of Interest Study Geography	Tourists are defined as:
All Tourism Experiences	When a visitor stays in the polygon for more than 15 minutes and has not visited the polygon more than 20 times in any 90 day period, they are a tourist

Notes and Considerations:

- Any 90 day period refers to any consecutive 90 days in their mobile location data history
- Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.).
- Filter out people who work at the Tourism Experience.

What are Tourist Segments?

- Local Tourists: Tourists who reside within the same Region.
- Domestic Tourists: Tourists who reside in South Africa outside of Western Cape
- International Tourists: Tourists who reside outside of South Africa



Glossary of Key Terms

Term	Definition and Usage
Study Geography	A specific geography, defined by a boundary called a polygon.
Primary Study Geography	The largest area in the destination in which you want to capture mobile device data. For most destinations this is usually a country, province, or state.
Secondary Study Geography	Often destinations want to derive insights about sub-geographies within their destination, such as counties, tourism regions, an d city regions.
Point of Interest	Points of interest are the smallest study geographies in your destination such as tourism businesses, parks, roadways, or city districts.
Sample	Not all people carry GPS enabled, opted in mobile devices with location services always activated. Thus, in any period of time, in any given study geography, mobile location data is a sample. Therefore, whenever this whitepaper discusses "visitors" or "tourists" or "residents" or any other grouping of devices, it should always be understood to be a sampling of real world visitor ship or foot traffic.
Visitors	Mobile devices seen within the study geography during a specific period of time
Common Evening Location (CEL)	Derived latitude-longitude point near which a device spends most of its time on evenings and/or weekends. While most often associated with a device's home, there is nothing that inherently guarantees that it is a home (e.g. a person who works an overnight shift at a power plant).
Common Daytime Location (CDL)	Derived latitude-longitude point near which a device spends most of its traditional workweek [Monday Friday, 8am 6pm local time] time]. While most often associated with a device's office or work location, there is nothing that inherently guarantees that it is an office or work location (e.g. a person who is a stay at home parent).
Residents/Workers/Locals	Terms referring to a visitor segment comprising of devices which are determined to have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography. For most tourism analyses, these devices are eliminated from the project because they are not, by definition, tourists. However, it is possible to include these devices within a broader visitor study.
Tourists	Term generally referring to a visitor segment comprising of devices which are determined to have NOT have a CEL or a CDL with the study geography or within a certain (usually short) distance of the study geography but have come to the study geography from a different origin market.
Tourist Segments	Groupings of tourist segments which have a defining characteristic associated with their appearance in a study geography, such a s "Short Haul Tourists" or "International Tourists" or "In State Tourists."
Overnighters	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for more than one consecutive day. An overnight stay is defined as tourists that arrived prior to midnight (0:00) and stayed until 07:00 the following day.
Day Trippers	Term which characterizes a specific visitor segment where mobile devices are seen in the study geography for less than one day.
Length of Stay	Duration of trip within the study geography. The methodology for calculating length of stay is based on the characteristics of t he geography.



