Destination Performance: Domestic Market

January to December 2023

About this report:

The data represented in this report are derived from the Annual Tourism Performance report from South African Tourism (SAT), which provides an overview of national and provincial tourism performance between January and December 2023.

The data aims to reflect domestic tourism trends for South Africa and the Western Cape. Key trends indicate the number of domestic overnight trips, day trips, expenditure patterns, bed nights, average length of stay, and the main purpose of visit amongst domestic tourists.

Contents

wesgro
cape town & western cape
research

1. Definitions

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

Same day visitor – Any person who visits a place without staying the night.

Tourist – A visitor who stays at least one night in the place visited.

Domestic visitor – A visitor whose country of residence is the country visited. They may be nationals of this country or foreign nationals.

Domestic tourists – A resident of the country of reference who spends at least one night in the place visited outside of his/her usual environment.

Overnight trip – A journey undertaken by one or more members of the household for at least one night away from home, where the persons travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.

Methodology

South African Tourism's Domestic Survey is conducted through in-home face-to-face interviews – the most feasible interview approach for this type of study, in order to ensure high data quality. The sample is designed as a multi-stage, stratified sample of n=1 300 per month.

The sampling framework is built from geographic strata based on enumerator areas (EAs) used as primary sampling units (PSUs), and households, used as the secondary sampling units (SSUs). In each EA drawn, four households are systematically selected with an equal selection probability. However, the EAs are disproportionally allocated to the main strata in order to ensure sufficient representation of domestic tourism from smaller provinces. The sample design ensures all stratification variables such as province, metro, urban, rural, race, age, and gender are covered. The domestic survey has a margin of error of 2.7% at a confidence level of 95% for the monthly sample. Results are weighted based on Stats SA's mid-year population estimates of SA residents aged 18 and above, and as such, the sample is representative of SA's adult population.

Due to the Covid-19 pandemic, surveying in-home face-to-face became impossible and the survey was halted at the end of February 2020. The survey was renewed in July 2020 (for March travel).

Source: Adopted from South African Tourism (SAT) (2024)

WESGRO
cape town & western cape
research

2. Executive Summary

- In 2023, a total of 37.9 million domestic trips were taken to South Africa. When compared to 2022, an 11.3% growth was recorded year-on-year (y-o-y).

- Total direct domestic spend within South Africa reached R121.4 billion in 2023, representing an increase of 22.4% in relation to 2022.

- The average spend per domestic trip was R3,203 in 2023, representing an increase of 9.9% y-o-y.

- The domestic tourism trips lasted for an average of 3.5 nights in 2023, resulting in a total of 133.0 million bed nights.

- The Western Cape accounted for 10.1% of all South Africa's domestic trips in 2023.

- Domestic trips to the Western Cape totaled 3.8 million in 2023, representing an increase of 10.5% y-o-y.

- Domestic trips taken to the Western Cape injected R14.8 billion into the Western Cape economy, an increase of 14.4% when compared to the R12.9 billion recorded in 2022. In 2023, domestic visitors spent 12.4 million bed nights in the Western Cape.

- Overnight domestic trips to the Western Cape translated into an average length of stay of 3.8 nights in 2023, an increase of 13.4% in comparison to the 3.3 nights recorded in 2022.

- The main reason for domestic trips to the Western Cape was for holiday, which accounted for 2.0 million of all trips taken in 2023. This was followed by over 800,000 trips for visiting friends and relatives (VFR) and 127,150 for meetings, incentives, conferences, and exhibitions (MICE).

- In 2023, January, August, September, and October witnessed a relatively higher share of domestic trips to the province. September accounted for 22% of total trips to the Western Cape.

Continued on the next page…

2. Executive Summary *Continued…*

- In 2023, according to insights from mobile location data, a total of 1.3 million domestic tourists travelled to the Western Cape. In addition, 43% of these visitors came back for another visit, which highlights the appeal and satisfaction of the region as a tourism destination.

- During the sampling period, a total of 639,628 tourists were recorded as being from Cape Town, 89,126 from Johannesburg, 67,036 from Tshwane, 46,390 from Ekurhuleni, and 42,833 from Nelson Mandela Bay.

- When it comes to popular destinations in the province, the Winelands attracted the highest number of tourists, with 589,103 visitors visiting the region, followed by Cape Town with 317,293 visitors, the Overberg with 178,633 visitors, and the Garden Route & Klein Karoo with 156,086 visitors.

- The mobile location data also revealed that both Cape Town and the Winelands were the top regions for domestic repeat visits, with 45.0% and 42.8% of tourists returning to these areas, respectively.

- In terms of the average duration of stay by tourists, the Garden Route & Klein Karoo were the destinations where tourists stayed the longest, at 3.3 days. This was followed by Cape Town with 3.0 days, and Weskus with 2.5 days. More than 60% of sampled tourists preferred staying overnight in the Garden Route & Klein Karoo and Cape Town, while 53.3% chose Weskus as their preferred destination for an overnight stay.

- The mobile location data shows that shopping and markets were the primary attractions for 60,102 domestic tourists, who spent an average of 2.4 hours at these locations. In addition, natural attractions were the second most popular choice, drawing 27,598 domestic tourists who spent an average of 2.5 hours at these attractions. Interestingly, spending time in areas such as Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley, and Van Dyk's Bay ranked as the third most popular point of interest among 21,059 domestic tourists, who spent an average of 3.2 hours at these attractions.
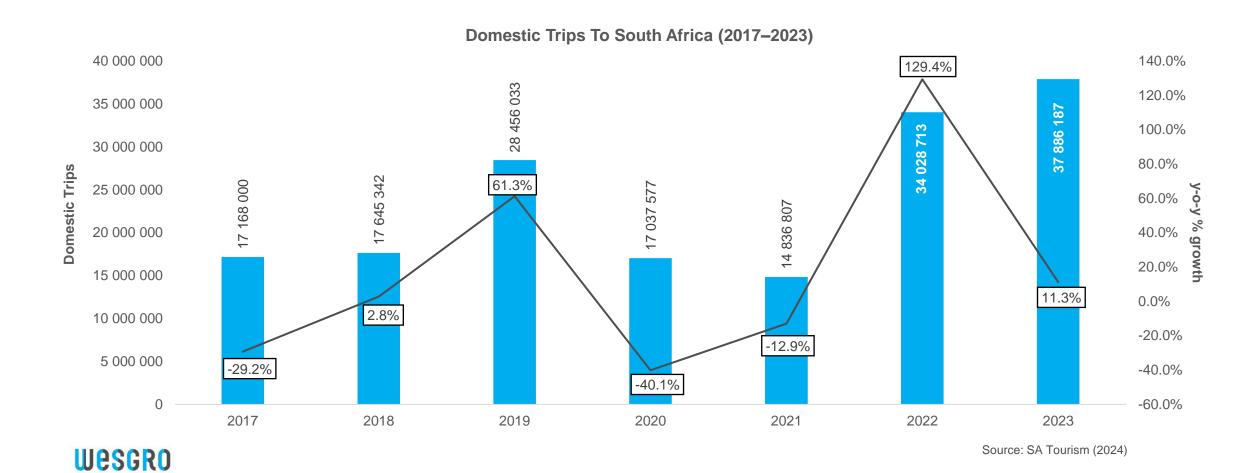
3. Domestic Tourism Performance in South Africa

Domestic Tourism Performance in South Africa

- In 2023, South Africa saw an increase in domestic tourist trips with a total of 37.9 million for the year. This represented an impressive year-on-year (y-o-y) growth of 11% from the previous year.

Domestic Trips To South Africa (2017–2023)

Source: SA Tourism (2024)

Domestic Tourism Performance in South Africa

Domestic Tourism Performance in South Africa, 2017–2023						
Tourism Indicator	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Total domestic trips	17.2 million	17.7 million	28.5 million	17.0 million	14.8 million	34.0 million	37.9 million
Total direct domestic spend	R22.1 billion	R26.4 billion	R43.9 billion	R53.1 billion	R45.4 billion	R99.2 billion	R121.4 billion
Average spend per domestic trip	R1,280	R1,497	R1,542	R3,118	R3,062	R2,914	R3,203
Average nights per domestic trip	4.1 nights	3.9 nights	3.3 nights	3.3 nights	3.3 nights	3.4 nights	3.5 nights
Total annual domestic bed nights	70.1 million	69.3 million	94.1 million	56.8 million	51.2 million	118.6 million	133.0 million
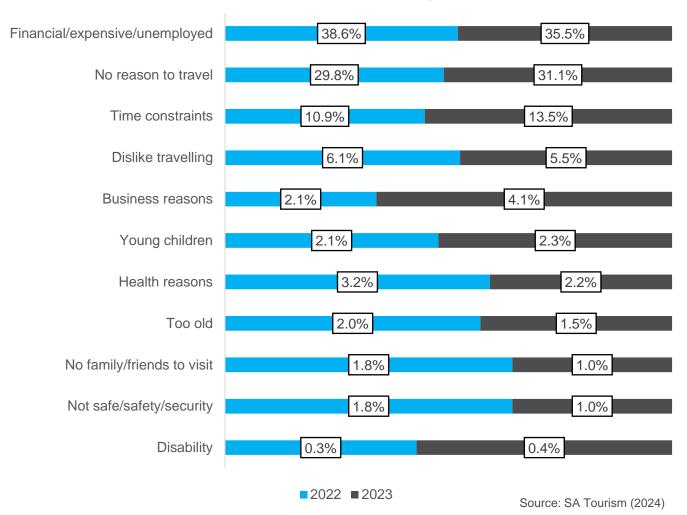
Seven years in review: Domestic trips, direct spend, average spend per domestic trip, and bed nights in South Africa continue to grow.

- Total domestic trips: **11% y-o-y growth between 2022 and 2023.**

- Total direct domestic spend: **22% y-o-y growth between 2022 and 2023.**

- Average spend per domestic trip: **10% y-o-y growth between 2022 and 2023.**

- Average nights per domestic trip: **3.5 nights**

- Total annual domestic bed nights: **12% y-o-y growth between 2022 and 2023.**

Source: SA Tourism (2024)

WESGRO
cape town & western cape
research

*y-o-y – Year-on-Year

Domestic Tourism Performance in South Africa

Reasons for Not Travelling (2023)

Reason	2022	2023
Financial/expensive/unemployed	38.6%	35.5%
No reason to travel	29.8%	31.1%
Time constraints	10.9%	13.5%
Dislike travelling	6.1%	5.5%
Business reasons	2.1%	4.1%
Young children	2.1%	2.3%
Health reasons	3.2%	2.2%
Too old	2.0%	1.5%
No family/friends to visit	1.8%	1.0%
Not safe/safety/security	1.8%	1.0%
Disability	0.3%	0.4%

■2022 ■2023

Source: SA Tourism (2024)

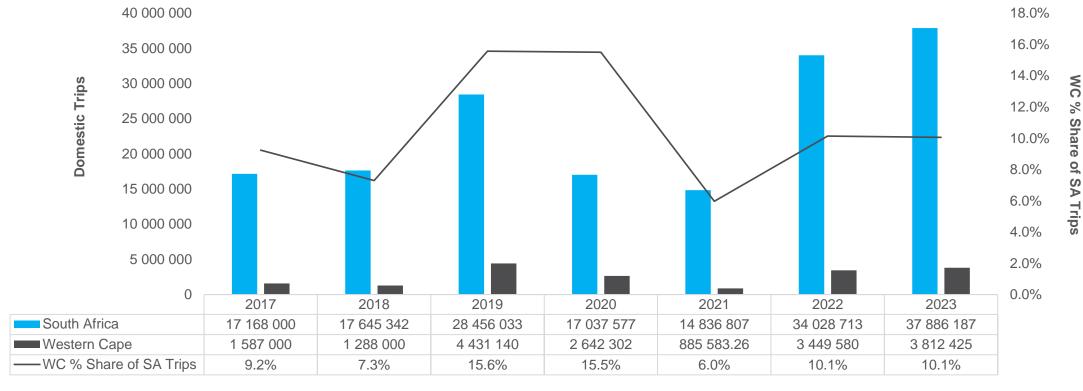- The most prominent reason for South Africans not undertaking a domestic overnight trip in 2023 was "**financial/expensive/unemployment**" (35.5%), followed by **"no reason to travel"** (31.1%) and **"time constraints"**(13.5%).

- This trend reflects the rationale for refraining from travelling in 2022 and 2023.

wesgro
cape town & western cape
research

4. Domestic Tourism Performance in the Western Cape

Domestic Tourism Performance in the Western Cape

- The Western Cape recorded a total of 3.8 million domestic trips in 2023, accounting for 10% of South Africa's domestic trips taken in the same year.

Domestic Trips To South Africa And The Western Cape (2017–2023)

	2017	2018	2019	2020	2021	2022	2023
South Africa	17 168 000	17 645 342	28 456 033	17 037 577	14 836 807	34 028 713	37 886 187
Western Cape	1 587 000	1 288 000	4 431 140	2 642 302	885 583.26	3 449 580	3 812 425
WC % Share of SA Trips	9.2%	7.3%	15.6%	15.5%	6.0%	10.1%	10.1%

Source: SA Tourism (2024)

WESGRO
cape town & western cape
research

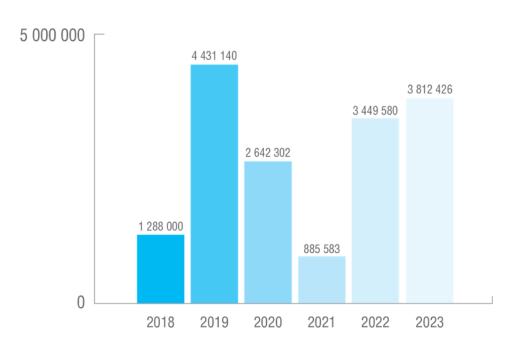# Domestic Tourism Performance in the Western Cape

- Between 2018 and 2023, 2019 was the year in which domestic tourists embarked on the greatest number of trips to the Western Cape. Domestic spend nearly doubled in 2023 vs 2019.

- In 2023, the Western Cape attracted more than 3.8 million domestic tourists. This influx resulted in a substantial R14.8 billion in domestic revenue for the province.

Domestic trips to the Western Cape

Year	Domestic trips
2018	1 288 000
2019	4 431 140
2020	2 642 302
2021	885 583
2022	3 449 580
2023	3 812 426

Domestic spend (R billions) in the Western Cape

Year	Domestic spend
2018	R1.9
2019	R7,7
2020	R6,9
2021	R6,8
2022	R12,7
2023	R14,8

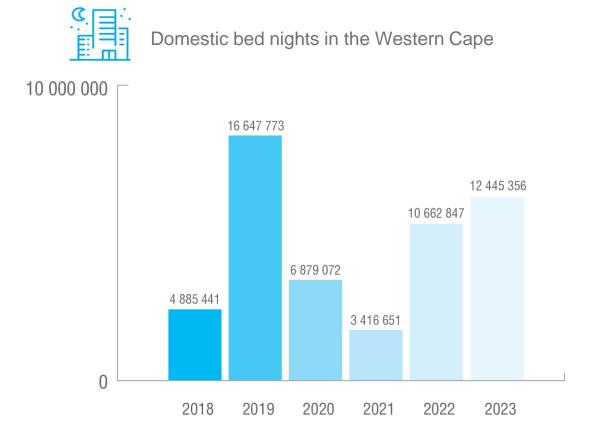WESGRO
cape town & western cape
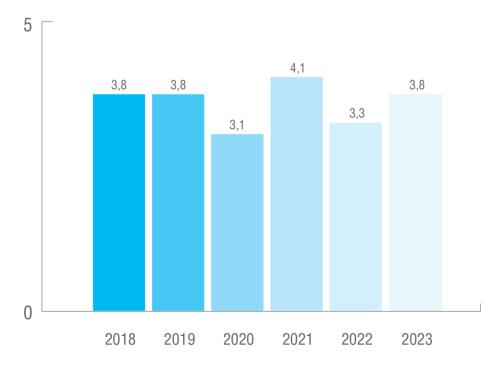research

Domestic Tourism Performance in the Western Cape

- In 2023, 12.4 million bed nights were recorded in the Western Cape. Overnight domestic trips to the Western Cape translated into an average length of stay of 3.8 nights in 2023, an increase of 13.4% in comparison to the 3.3 nights recorded in 2022.

Domestic bed nights in the Western Cape

Year	Bed nights
2018	4 885 441
2019	16 647 773
2020	6 879 072
2021	3 416 651
2022	10 662 847
2023	12 445 356

(y-axis: 10 000 000 to 0)
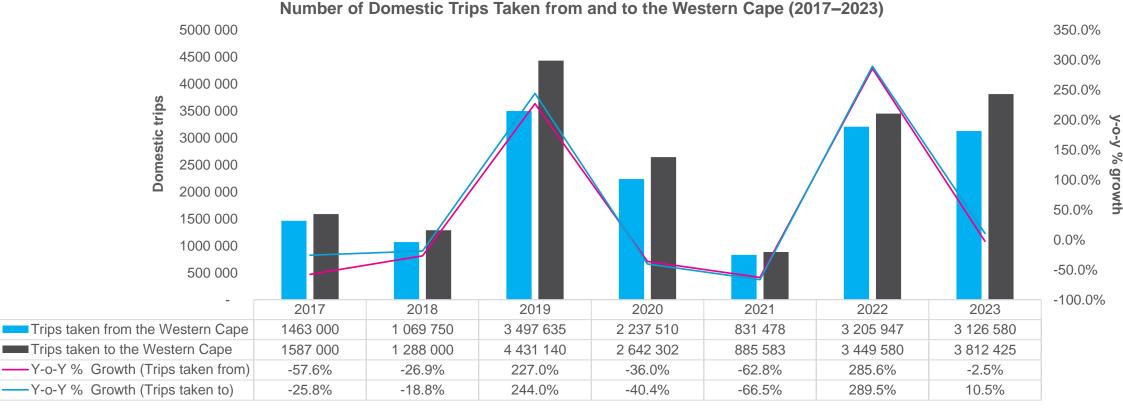
Domestic length of stay in the Western Cape

Year	Length of stay
2018	3,8
2019	3,8
2020	3,1
2021	4,1
2022	3,3
2023	3,8

(y-axis: 5 to 0)

Overview of the Domestic Market: Western Cape

- Trips taken from the Western Cape showed a similar trend, accounting for 3.1 million trips and declined by 2.5% in 2023.

- Trips taken to the Western Cape reached 3.8 million and increased by 10.5% y-o-y in 2023.

Number of Domestic Trips Taken from and to the Western Cape (2017–2023)

	2017	2018	2019	2020	2021	2022	2023
Trips taken from the Western Cape	1463 000	1 069 750	3 497 635	2 237 510	831 478	3 205 947	3 126 580
Trips taken to the Western Cape	1587 000	1 288 000	4 431 140	2 642 302	885 583	3 449 580	3 812 425
Y-o-Y % Growth (Trips taken from)	-57.6%	-26.9%	227.0%	-36.0%	-62.8%	285.6%	-2.5%
Y-o-Y % Growth (Trips taken to)	-25.8%	-18.8%	244.0%	-40.4%	-66.5%	289.5%	10.5%

Source: SA Tourism (2024)

WESGRO
cape town & western cape
research

Domestic Tourism Performance in the Western Cape

- **Seven years in review**: The growth of the total number of day trips in the province has fluctuated.

- Total number of day trips: 12.0% y-o-y decline between 2022 and 2023.

- The main reasons for domestic trips to the Western Cape were holidays (2.0 million visitors), visiting friends and relatives (VFR) (879,094 visitors) & meetings, incentives, conferences, and exhibitions (MICE) (127,150 visitors).

Total Number of Day Trips and Purpose of Visits (2017–2023)							
	2017	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Total number of day trips	7 109 000	12 059 237	34 042 053	18 337 639	4 876 446	15 495 472	13 643 446
Main purpose of visit to the Western Cape	Holiday (538 006)	VFR (582 118)	VFR (1 548 499)	VFR (1 203 393)	VFR (433 813)	VFR (1 483 959)	Holiday (2 023 559)
	VFR (531 872)	Holiday (426 699)	Holiday (1 280 137)	Holiday (923 296)	Holiday (384 002)	Holiday (1 408 981)	VFR (879 094)
	Business (139 224)	Religion (42 359)	Business (112 026)	Business (44 157)		Religious (75 951)	MICE (127 150)

WESGRO
cape town & western cape
research

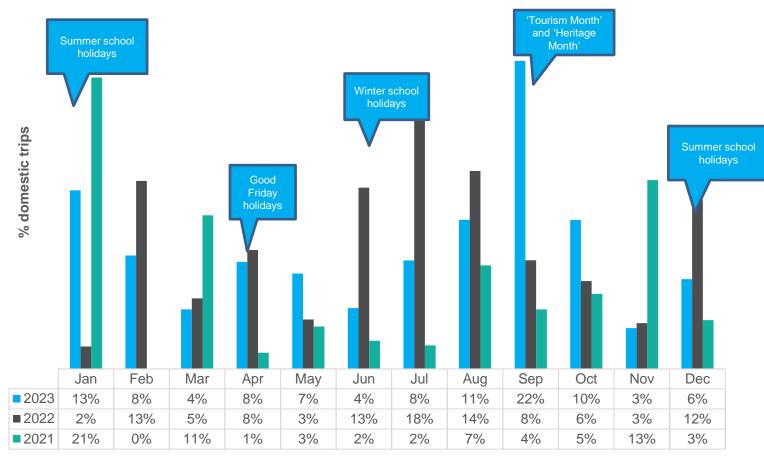# Domestic Tourism Performance in the Western Cape

Origin of Domestic Trips to the Western Cape (2023)

	Eastern Cape	Free State	Gauteng	KwaZulu Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Eastern Cape	59.9%	0.3%	2.2%	3.0%	0.0%	0.0%	0.0%	0.0%	6.8%
Free State	5.6%	55.7%	6.2%	0.7%	0.1%	0.3%	10.4%	7.0%	4.5%
Gauteng	14.7%	22.7%	42.5%	25.7%	20.8%	38.5%	8.1%	32.7%	16.4%
KwaZulu Natal	4.6%	0.3%	7.8%	57.9%	0.2%	2.2%	0.0%	0.0%	4.8%
Limpopo	0.6%	0.9%	20.9%	6.7%	74.3%	21.2%	2.3%	6.3%	2.2%
Mpumalanga	1.2%	0.0%	7.5%	2.7%	2.3%	33.1%	0.0%	1.3%	0.3%
Nothern Cape	0.8%	4.8%	3.0%	0.0%	0.0%	0.8%	70.9%	4.9%	5.8%
North West	0.8%	15.0%	7.7%	0.1%	2.1%	3.7%	5.2%	47.9%	0.0%
Western Cape	11.7%	0.4%	2.2%	3.1%	0.2%	0.2%	3.1%	0.0%	59.1%

Source: SA Tourism (2024)

- The domestic trends indicate that the Western Cape's largest share of domestic trips originated from within the Western Cape (59.1%).

- The second and third largest share of trips to the Western Cape were made from Gauteng (16.4%) and Eastern Cape (6.8%) respectively.
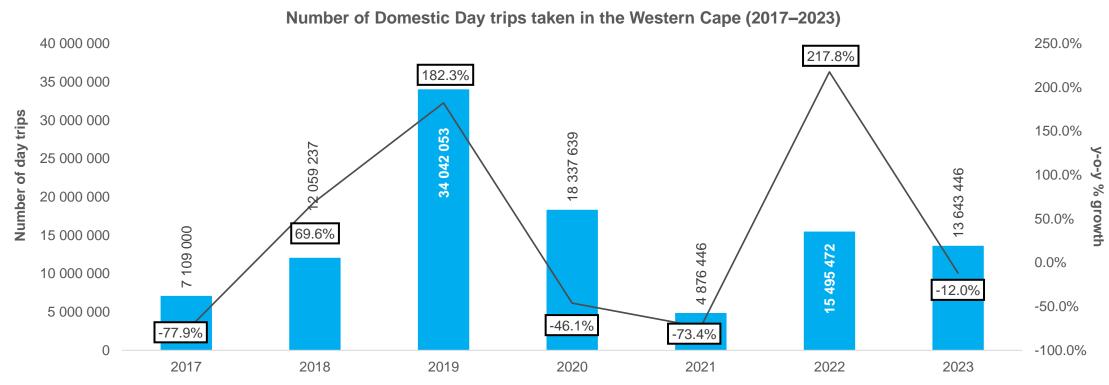
WESGRO
cape town & western cape
research

Domestic Tourism Performance in the Western Cape

% Share of Total Domestic Trips to the Western Cape by month (Jan–Dec 2021–2023)

- **Three years in review:** The percentage share of total domestic trips to the Western Cape has shown some variability from 2021 to 2023. While there has not been a consistent pattern, it is worth noting that in 2023, January, August, September, and October accounted for a relatively higher share of domestic trips to the province.

- In 2023, September was the month during which the highest number of trips (22%) were made to the Western Cape.

- This increase in travel can be attributed to the celebration of Tourism Month and Heritage Day during September, which likely encouraged more domestic travel to the province.

- In addition, January accounted for 13% of trips to the province, while August 11% of trips to the Western Cape occurred in August.
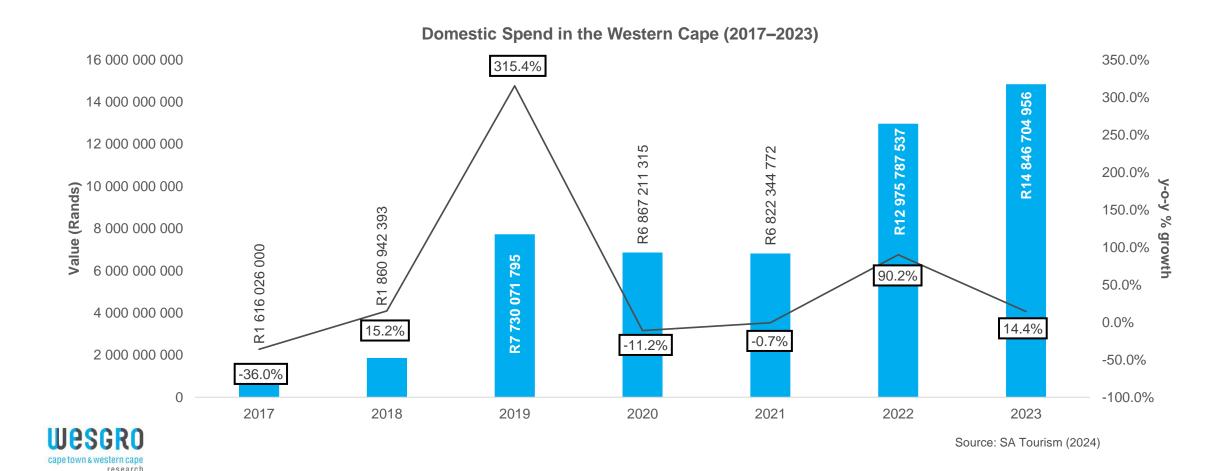
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	13%	8%	4%	8%	7%	4%	8%	11%	22%	10%	3%	6%
2022	2%	13%	5%	8%	3%	13%	18%	14%	8%	6%	3%	12%
2021	21%	0%	11%	1%	3%	2%	2%	7%	4%	5%	13%	3%

Source: SA Tourism (2024)

WESGRO
cape town & western cape
research

Domestic Tourism Performance in the Western Cape

- **Seven years in review:** The growth of domestic day trips in the province has fluctuated, with the greatest number of day trips having occurred in 2019.

- The number of day trips occurring in the Western Cape in 2023 amounted to a total of 13.5 million, which represented a decrease of 12.0% compared to 2022, when 15.4 million day trips took place.

Number of Domestic Day trips taken in the Western Cape (2017–2023)

Source: SA Tourism (2024)

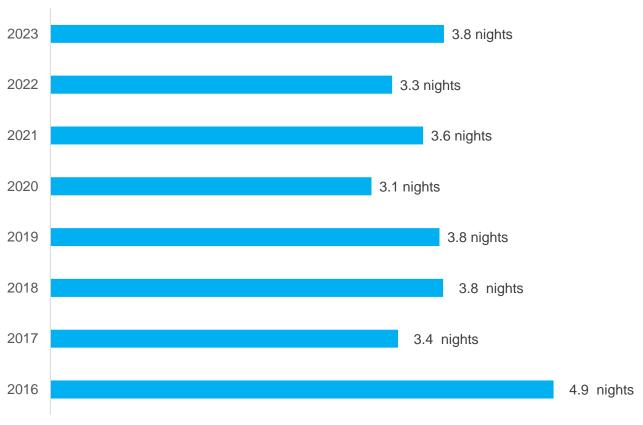# Domestic Tourism Performance in the Western Cape

- In 2023, despite a notable portion of domestic tourists expressing financial constraints, unemployment, or a lack of motivation to travel, the Western Cape managed to attract more than 3.8 million domestic tourists.

- This influx resulted in a substantial R14.8 billion in domestic revenue for the province.

Domestic Spend in the Western Cape (2017–2023)

Year	Value	y-o-y % growth
2017	R1 616 026 000	-36.0%
2018	R1 860 942 393	15.2%
2019	R7 730 071 795	315.4%
2020	R6 867 211 315	-11.2%
2021	R6 822 344 772	-0.7%
2022	R12 975 787 537	90.2%
2023	R14 846 704 956	14.4%

Source: SA Tourism (2024)

wesgro
cape town & western cape
research

Domestic Tourism Performance in the Western Cape

Average length of stay of domestic tourists to the Western Cape (2016–2023)

Year	Nights
2023	3.8 nights
2022	3.3 nights
2021	3.6 nights
2020	3.1 nights
2019	3.8 nights
2018	3.8 nights
2017	3.4 nights
2016	4.9 nights

Source: SA Tourism (2024)

- **Eight years in review:** Regarding the average length of stay for domestic tourists in the Western Cape, most visitors stayed for just over three nights between 2017 and 2023. However, in 2016, the average length of stay was 4.9 nights.

- In 2023, on average, domestic overnight travelers spent 3.8 nights in the Western Cape.

- This suggests that domestic tourists are still keen on enjoying extended weekend getaways in the Western Cape region.

WESGRO
cape town & western cape
research

5. Domestic Visitor Trends: Mobile Location Data Insights
January–December 2023

Western Cape Mobile Location Data Insights
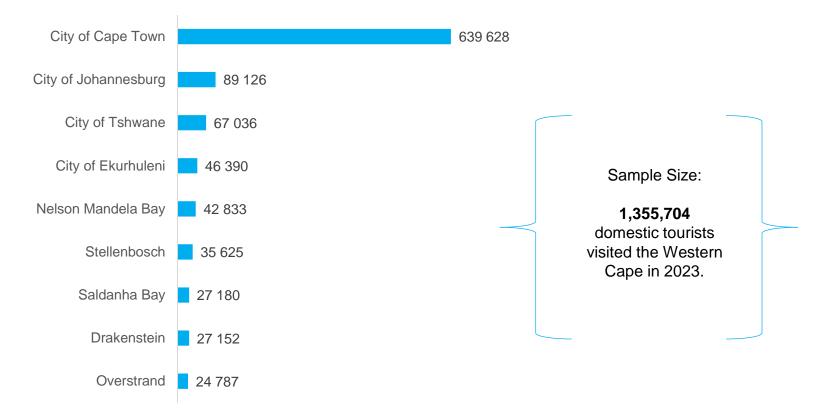
What is mobile location data?

- This is 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 anonymised 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 regions.

- Mobile location data serves as a sample. It does not represent 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.
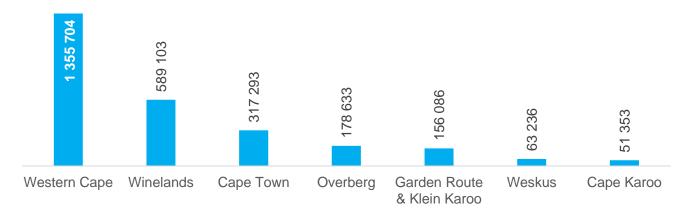
Source: Rove (2024)

WeSGRO
cape town & western cape
research

WC Domestic Visitor Trends: Mobile Location Data Insights

Municipality of origin for domestic tourists to the Western Cape (Jan–Dec 2023)

Municipality	Visitors
City of Cape Town	639 628
City of Johannesburg	89 126
City of Tshwane	67 036
City of Ekurhuleni	46 390
Nelson Mandela Bay	42 833
Stellenbosch	35 625
Saldanha Bay	27 180
Drakenstein	27 152
Overstrand	24 787

Sample Size:

1,355,704 domestic tourists visited the Western Cape in 2023.
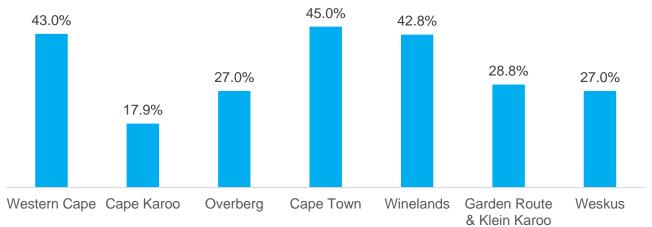
- According to the mobile data findings, of the 1.3 million domestic tourists who visited the Western Cape in 2023, 639,628 of the sampled tourists were from Cape Town, 89,126 from Johannesburg, 67,036 from Tshwane, 46,390 from Ekurhuleni, and 42,833 from Nelson Mandela Bay

Source: Rove (2024)

WESGRO
cape town & western cape
research

WC Domestic Visitor Trends: Mobile Location Data Insights

Domestic sample size (Jan–Dec 2023)

Region	Visitors
Western Cape	1 355 704
Winelands	589 103
Cape Town	317 293
Overberg	178 633
Garden Route & Klein Karoo	156 086
Weskus	63 236
Cape Karoo	51 353

Domestic Repeat visitors (Jan–Dec 2023)

Region	Repeat %
Western Cape	43.0%
Cape Karoo	17.9%
Overberg	27.0%
Cape Town	45.0%
Winelands	42.8%
Garden Route & Klein Karoo	28.8%
Weskus	27.0%
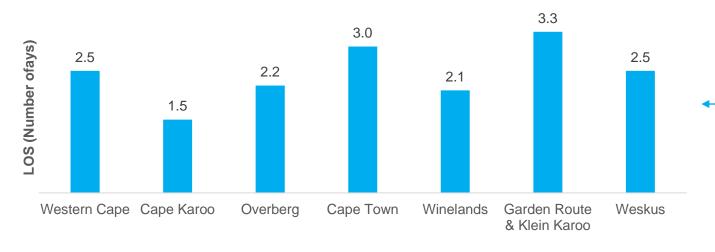
- According to the mobile data findings, the Western Cape experienced a significant increase in visitors, with a total of 1,355, 704 tourists visiting between January and December 2023. Some, 43.0% of these visitors returned for another visit.
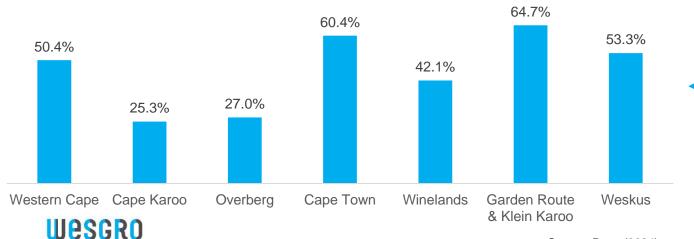
- The most popular destinations in the province during this period were the Winelands (589,103 visitors), Cape Town (317,293), Overberg (178,633), and the Garden Route & Klein Karoo (156,086).

- Cape Town and the Winelands emerged as the most popular regions for domestic repeat visits, with 45.0% and 42.8% of tourists returning to these regions.

- The Cape Karoo region welcomed slightly more than 50,000 visitors between January and December 2023. However, there was a 17.9% in the number of repeat visitors.

Source: Rove (2024)

WC Domestic Visitor Trends: Mobile Location Data Insights

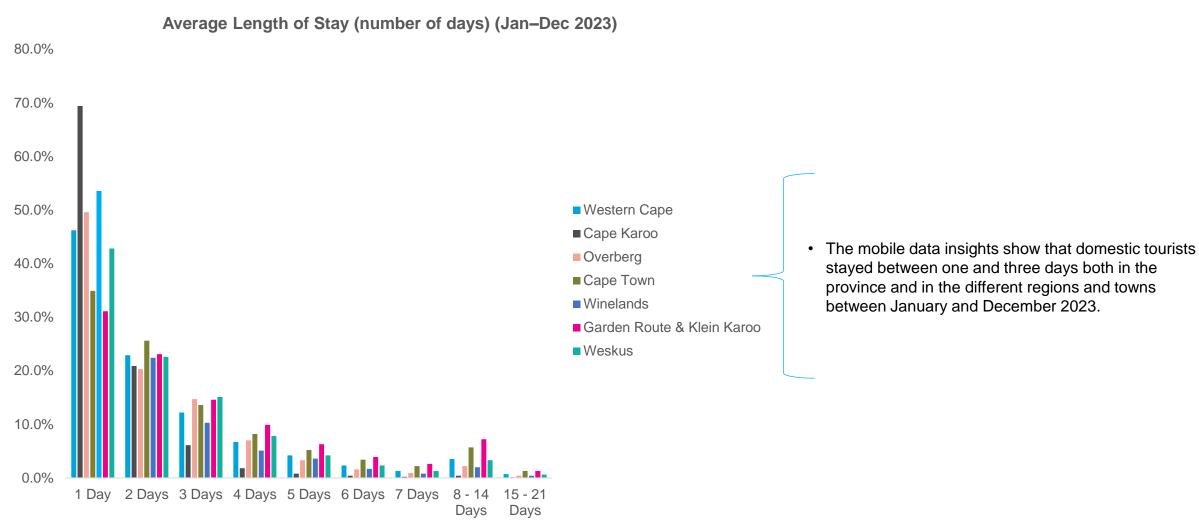**Average length of stay (LOS) (Jan–Dec 2023)**

- Domestic tourists who visit the Western Cape tend to spend the longest time in some of the most popular tourist destinations.

- The top three destinations for domestic visitors were the Garden Route & Klein Karoo (3.3 days), Cape Town (3.0 days), and Weskus (2.5 days).
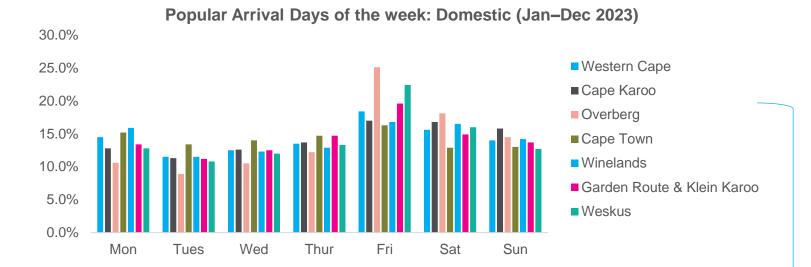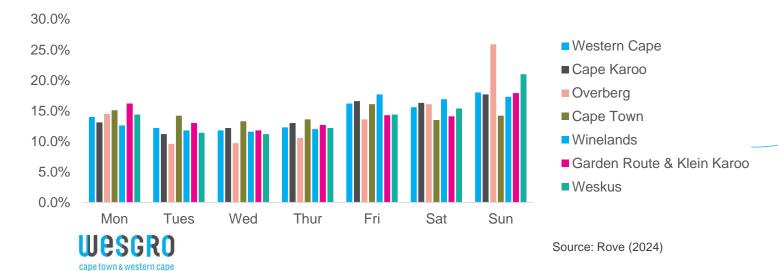
% Overnight stays (Jan–Dec 2023)

- Over 60% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo and Cape Town and 53.3% choose Weskus as their preferred destination for an overnight stay.

Source: Rove (2024)

WC Domestic Visitor Trends: Mobile Location Data Insights

Average Length of Stay (number of days) (Jan–Dec 2023)

Legend:
- Western Cape
- Cape Karoo
- Overberg
- Cape Town
- Winelands
- Garden Route & Klein Karoo
- Weskus

- The mobile data insights show that domestic tourists stayed between one and three days both in the province and in the different regions and towns between January and December 2023.

Source: Rove (2024)

wesGRO
cape town & western cape
research

WC Domestic Visitor Trends: Mobile Location Data Insights

Popular Arrival Days of the week: Domestic (Jan–Dec 2023)

Legend: Western Cape, Cape Karoo, Overberg, Cape Town, Winelands, Garden Route & Klein Karoo, Weskus

Popular Departure Days of the Week: Domestic (Jan–Dec 2023)

Legend: Western Cape, Cape Karoo, Overberg, Cape Town, Winelands, Garden Route & Klein Karoo, Weskus

- Between January and December 2023, mobile data showed a consistent pattern in the choice of arrival and departure days in the Western Cape.

- Specifically, Fridays and Saturdays were the preferred days for arrivals, while Fridays and Sundays were the most popular choices for departures.

Source: Rove (2024)

WESGRO
cape town & western cape
research

WC Domestic Visitor Trends: Mobile Location Data Insights

Top 10 POIs Visited by Domestic Tourists (Jan–Dec 2023)			
	2023	**2022**	**2021**
Shopping and Markets	60 102	35 452	43 755
Natural Attraction	27 598	19 429	24 969
Area	21 059	10 092	16 391
Bars & Pubs	14 629	8 889	7 845
Beach	7 274	5 329	8 552
Roadway or Walkway	5 718	3 439	5 581
Historical Sites & Heritage Locations	4 155	1 826	1 905
Breweries, Distilleries, Wineries	2 724	1 828	2 336
Nature Center, Preserve	2 543	1 412	2 212
Local Parks and Gardens	2 189	1 627	1 666

Domestic Visitors Average Dwell Time (Hours) (Jan–Dec 2023)			
	2023	**2022**	**2021**
Shopping and Markets	2.4	2.5	2.5
Natural Attraction	2.5	2.6	2.5
Area	3.2	3.2	3.2
Bars & Pubs	3.2	3.2	3.0
Beach	2.3	2.2	2.3
Roadway or Walkway	2.9	2.8	2.8
Historical Sites & Heritage Locations	2.8	2.4	2.3
Breweries, Distilleries, Wineries	2.5	2.6	2.6
Nature Center, Preserve	3.1	3.2	2.9
Local Parks and Gardens	2.2	2.1	2.2

Top three Points of Interest (POIs)

1. Shopping and visiting markets were the most popular activities for 60,102 domestic tourists with an average dwell time of 2.4 hours.

2. Natural attractions ranked as the second most popular POI among 27,598 domestic tourists with an average dwell time of 2.5 hours.

3. Spending time in areas like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked third among amongst the top POIs visited by 21,059 domestic tourists, with an average dwell time of 3.2 hours.

Source: Rove (2024)

WesGRO
cape town & western cape
research

6. Domestic Tourism Performance in the Western Cape
Key insights

Key insights for retaining and increasing the value of domestic tourism experiences in the Western Cape

- The Western Cape stands out among other coastal regions due to its offering of a distinctive and customisable tourism experience, catering to domestic travellers from both coastal and inland provinces.

- According to the recent South African Tourism Domestic Lifestyle and Brand Tracking report (2023), a high percentage of South Africans are aware of the country's stunning beaches, coastline, diverse wildlife, natural beauty, breathtaking landscapes, picturesque vineyards, rich culture, and historical experiences. The report indicates a strong willingness among the population to travel to and explore these attractions.

- The research reveals that 78% of South Africans are familiar with the beautiful beaches and coastline, with 61% expressing interest in traveling to experience these natural wonders. In addition, 69% of the population is aware of the diverse wildlife experiences available, with 45% indicating an interest in partaking in these experiences.

- Moreover, 69% of South Africans are familiar with the stunning natural beauty, breathtaking landscapes, and picturesque vineyards in the country. However, only 45% consider these experiences viable travel options. This high level of awareness underscores the untapped potential for attracting tourists to these attractions.

- Furthermore, 65% of South Africans are aware of the rich cultural and historical experiences available for exploration in their country, but only 35% are considering these experiences as travel options. This highlights the opportunity for promoting and enriching cultural and historical tourism in the Western Cape.

- The research by South African Tourism (2023) further points out that the main factors driving domestic tourism include an interest in discovering the country's attractions, supporting the local economy and community, and contributing to the nation's economic growth through spending on travel. However, the challenge of making tourism as accessible to South African residents as it is to international tourists lies in understanding South African consumers' behaviour, preferences, and lifestyles.

- Of interest is and to support the above findings by South Africa Tourism, the 2023 Euromonitor report titled "Affordability, Value, and the Cost of Living" highlights that individuals globally are confronting the difficulties presented by the increasing cost of living. Inflation rates are on the rise, yet the growth of household income has not matched the rapid increase in prices. This holds true for consumers in South Africa as well. Therefore, from a tourism perspective, tourism stakeholders and destination marketing organisations (DMOs) need to design, package, and promote experiences that align with domestic tourists' preferences and financial situations, considering the impact of the high cost of living.

WESGRO
cape town & western cape
research

7. Appendix: ROVE Mobile Location Data Key Terms and Definitions

WESGRO
cape town & western cape
research

Definitions of Mobile Location Data and Tourists vs non-Tourists

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

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

Source: Rove (2024)

Definitions of Mobile Location Data and Tourists vs non-Tourists

Primary Study Geography	Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled more than 25 miles (40km), and they have stayed in the polygon for more than 120 minutes, they are a tourist.

Notes and Considerations:
- Residents of the Western Cape are not counted as a tourists
- Minimum distance travelled to meet the definition of tourist. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon
- Minimum duration of visit of 120 minutes excludes commuters driving through each region

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

Notes and Considerations:
- Residents of a city are not counted as tourists to the city
- Minimum distance traveled of 40km satisfies tourist definition for minimum distance travelled. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon

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

Notes and Considerations:
- Any 90-day period refers to any consecutive 90 days in their mobile location data history
- Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.).

What are Tourist Segments?

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

WESGRO
cape town & western cape
research

Glossary of Key Terms

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