



Tourism Research Overview

January 2022

Cape Town & the Western Cape

WESGRO

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

An Inspiring Place To Do Business

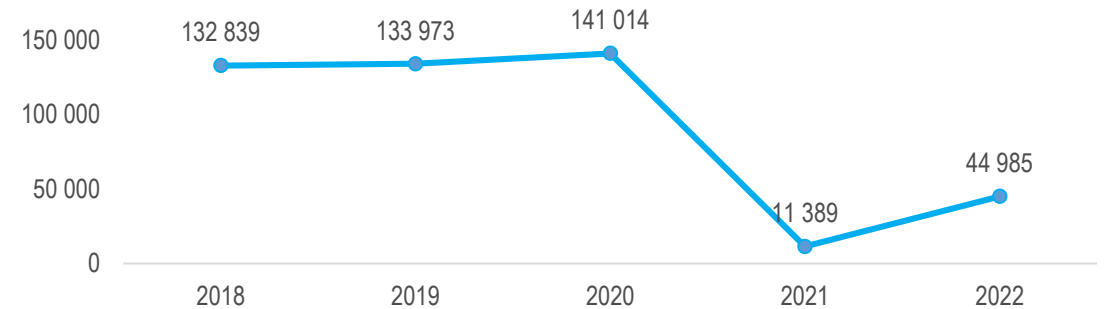
Key Findings

- International arrivals tripled from its January 2021 figure and domestic arrivals reached a 73% recovery rate when compared to the same month in 2019. Hotel occupancy grew from 17,4% in January 2021 to 48,8% in the same month this year, representing a recovery rate of 75% when compared to January 2019. Visitors to 27 participating attractions across the province recorded a total of nearly half a million visitors in January 2022, more than 70% growth in the number of visitors when compared to the same month last year and nearly half of what it was in January 2019.
- Based on mobile location data insights from 59 761 domestic and 807 international tourists, the Cape Winelands was the most popular region for domestic visitors in January and international tourists were found mostly in Cape Town. Domestic tourists stayed for an average 2,9 days in the province and international tourists spent on average 3,3 days.
- Garden Route & Klein Karoo was a popular region for domestic overnight stays and Cape Karoo saw more day visitors. Domestic visitors to the province were most likely to arrive on a Friday and depart on a Sunday, while international visitors arrived on a Saturday or Sunday and departed on Monday or Sunday.
- Shopping and markets was the most popular type of attraction visited for both domestic and international tourists. 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. 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.
- From a sample size of 601 tourists who visited the Stellenbosch Wine Route, close to 80% were locals, 19% were domestic and just over 1% were international tourists. Spier was the most visited farm on the route, followed by Zevenwacht and Skilpadvlei.
- The biggest volume of online conversations about the Western Cape was around outdoor activities. Highest sentiment was driven by Food + Culinary, which includes conversations about winery and vineyards, restaurant, dining and take-away, farmers markets and food producers, breweries and pubs, and distilleries and spirits. Destination Services also showed high sentiment, and includes accommodation, tours, weddings, and conferences and conventions. Safety drove the lowest sentiment.

1. International Passenger Arrivals

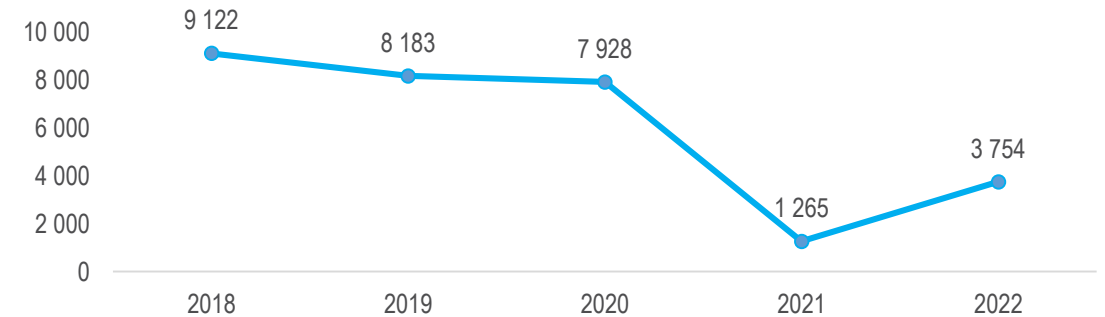
- **International arrivals** through the Airport reached 44 985 in January 2022, more than triple its January 2021 figure (11 389) and a third of what it was in the same month in 2019 (133 973).
- An additional 3 754 **regional passenger arrivals** were recorded in January 2022, up by 197% from 1 265 arrivals in the same month of the previous year and representing a 46% recovery when compared to January 2019.

Cape Town International Airport INTERNATIONAL passenger arrivals:
Jan 2018 - 2022



Source: ACSA, 2022

Cape Town International Airport REGIONAL passenger arrivals:
Jan 2018 - 2022

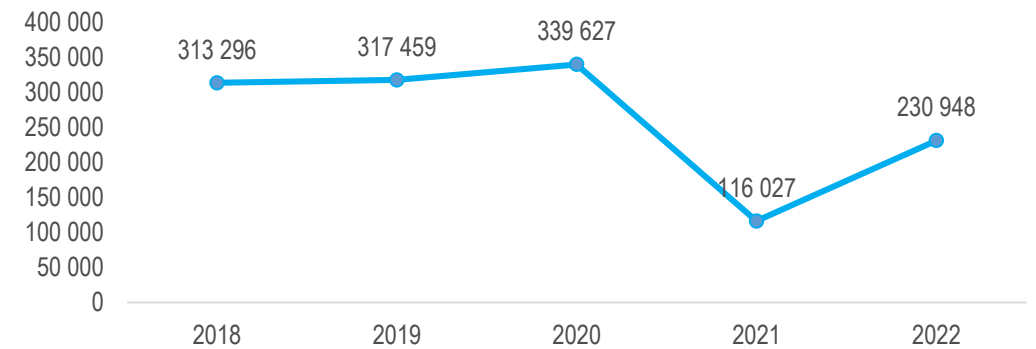


Source: ACSA, 2022

2. Domestic Passenger Arrivals

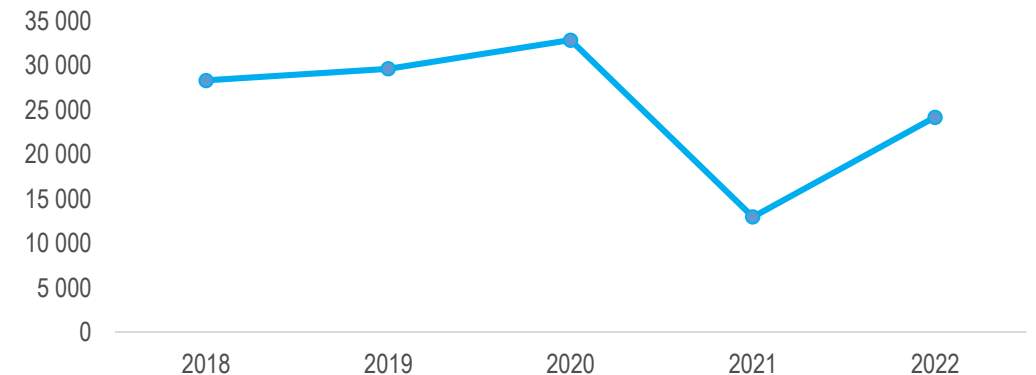
- Passenger arrivals through Cape Town International Airport **domestic terminal** reached 230 948 in January 2022, doubling from its figure of 116 027 in January 2021 and representing a 73% recovery when compared to January 2019.
- George Airport recorded 24 171 **domestic passenger arrivals** in January 2022, an 87% increase compared to the same month in 2021 and 82% recovery on its January 2019 figure.

Cape Town International Airport DOMESTIC passenger arrivals:
Jan 2018 - 2022



Source: ACSA, 2022

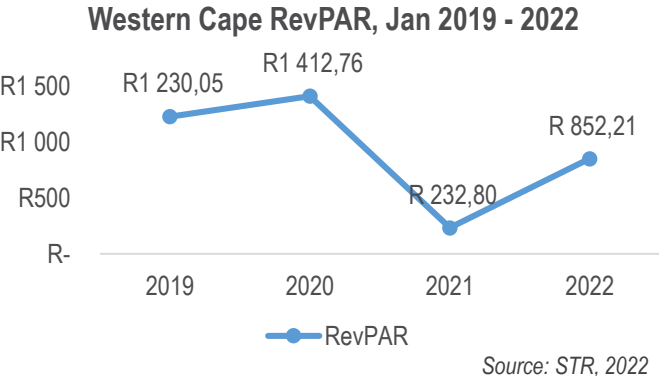
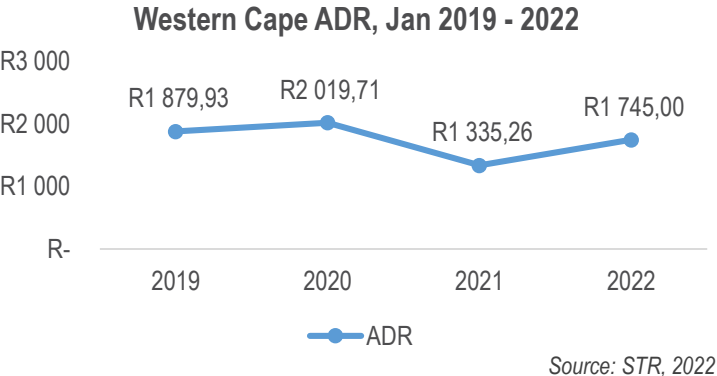
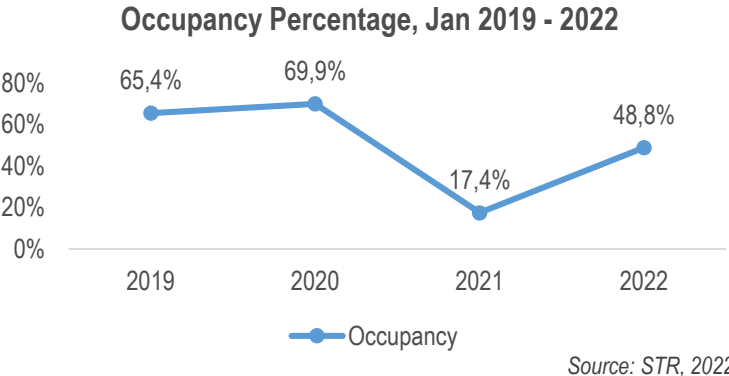
George Airport DOMESTIC passenger arrivals: Jan 2018 - 2022



Source: ACSA, 2022

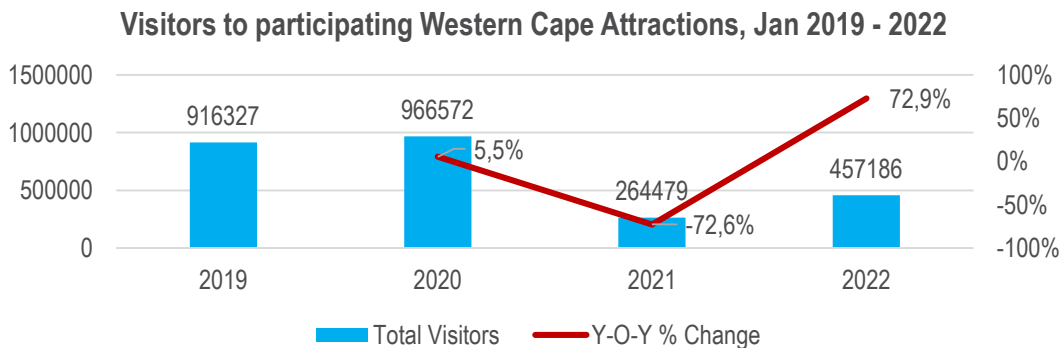
3. Hotel Occupancy in the Western Cape

- **Occupancy** in the Western Cape, at **48.8%** in January 2022, **more than doubled** when compared to 17.4% in the same month in 2021, reaching a **recovery rate of 75%** when compared to the 65.4% occupancy in January 2019.
- **The Average Daily Rate (ADR)** for the Western Cape grew to **R1, 745.00** in January 2022 with a **recovery rate of 93%** of its 2019 figure.
- At **R 852.21** in January 2022, **RevPAR (Revenue Per Average Room)** more than tripled on its 2021 figure and **recovered to 69%** of what it was in January 2019.



4. Western Cape Attractions

- Visitors to 27 participating attractions across the province recorded a total of **nearly half a million visitors** in January 2022, a **68% growth in the number of visitors** when compared to the same month last year and nearly half of what it was in January 2019.
- All the attractions listed experienced high year on year growth in visitor numbers this month, except for Kirstenbosch National Botanical Gardens (-11%), Bontebok National Park (-6%), Harold Porter National Botanical Garden (-1%), Kogelberg Nature Reserve (-19%), Knysna National Park (-23%), Protea Tractor Trip (-31%) and Birds Paradise (-33%), which saw a decline in visitors when compared to January 2021.
- However, despite year-on-year declines, **all of these attractions recovered to more than half of its 2019 figures.**



Attractions	Jan 2021/2022 % Change	Jan 2019/2022 Recovery %
Cape Town		
Table Mountain National Park	+114%	47%
Table Mountain National Park: Boulders	+285%	36%
Table Mountain National Park: Cape of Good Hope	+31%	31%
Table Mountain Aerial Cableway	+142%	49%
Kirstenbosch National Botanical Garden	-11%	57%
Robben Island	+325%	43%
Cape Overberg		
Cape Agulhas Lighthouse	Did not open in Jan 2021	82%
Agulhas National Park	+1140%	83%
Bontebok National Park	-6%	79%
De Hoop Nature Reserve	+71%	101%
De Mond Nature Reserve	+110%	107%
Harold Porter National Botanical Garden	-1%	199%
Kogelberg Nature Reserve	-19%	309%
Stony Point	+1151%	105%
Shipwreck Museum	+261%	72%
Garden Route & Klein Karoo		
Cango Caves	+111%	43%
Wilderness National Park	+15%	86%
Tsitsikamma National Park	+78%	72%
Knysna National Park	-23%	130%
Weskus		
West Coast National Park	+125%	76%
!Khwattu	+99%	110%
Old Jail	+4%	82%
Cape Karoo		
Karoo National Park	+53%	115%
Cape Winelands		
Avalon Springs (day visitors)	Did not open in Jan 2021	177%
Protea Tractor Trip	-31%	87%
Birds Paradise	-33%	86%
Viljoensdrift River Cruises	+111%	145%

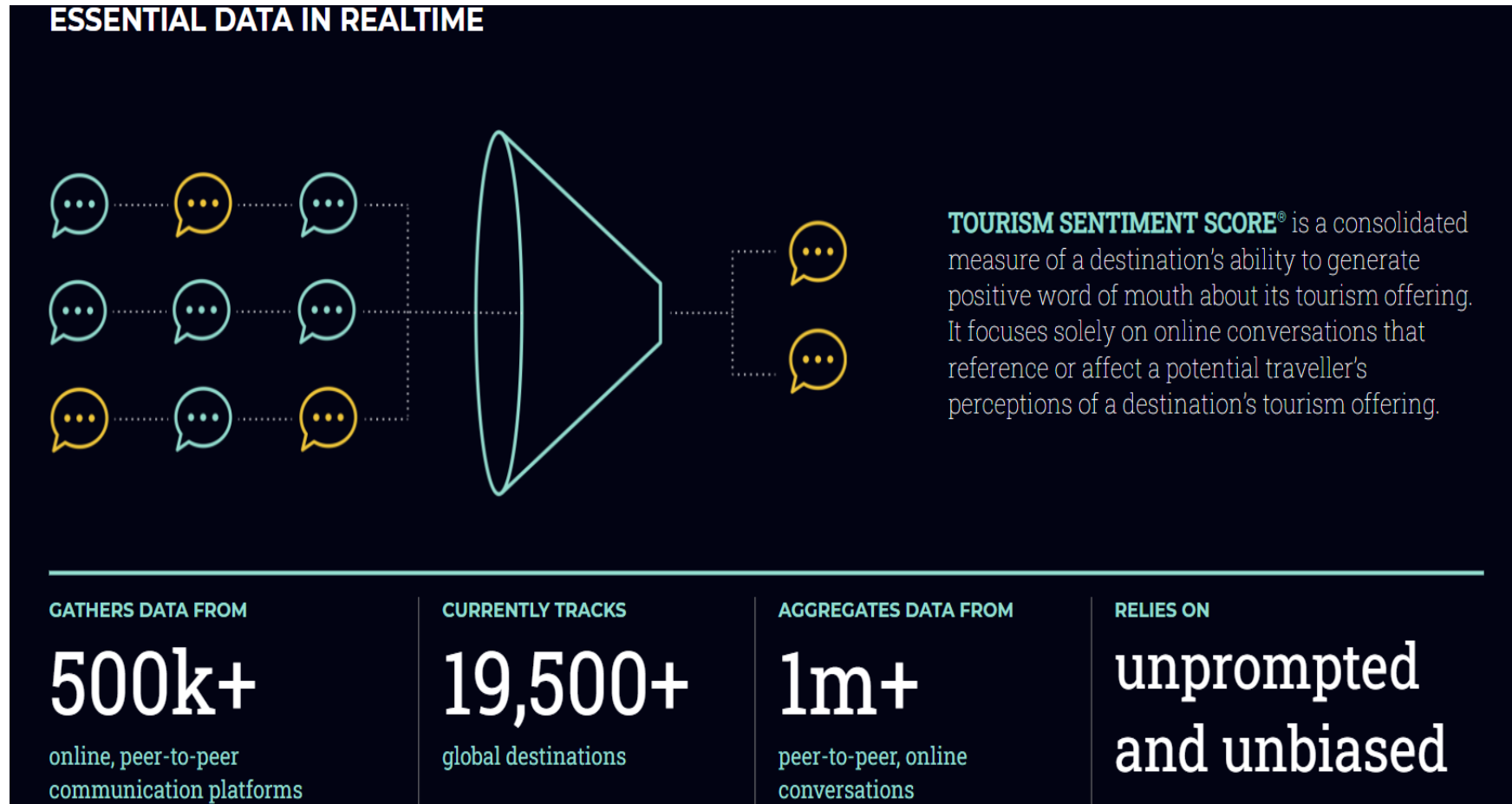
Tourism Sentiment Analysis for the Western Cape

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tourism, trade, investment, film

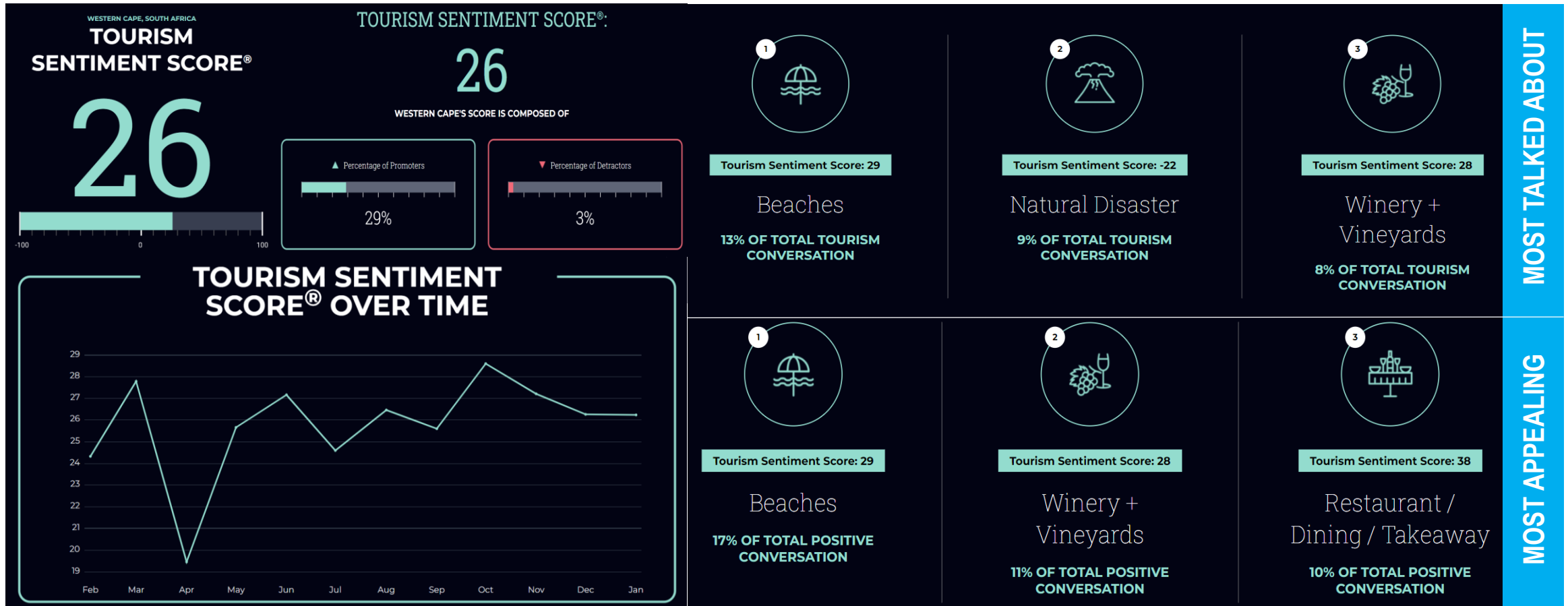
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5. Tourism Sentiment for the Western Cape



Source: TSI, 2022

5. Tourism Sentiment for the Western Cape



Source: TSI, 2022

5. Tourism Sentiment for the Western Cape

- Tourism Sentiment is based on **14 016 conversations** analyzed between 1 and 31 January 2022.
- The **biggest volume** of conversations was around **outdoor activities**.
- **Highest sentiment** was driven by **Food + Culinary** (32), which includes conversations about winery and vineyards, restaurant, dining and take-away, farmers markets and food producers, breweries and pubs, and distilleries and spirits.
- High sentiment also in **Destination Services** (31) – includes accommodation, tours, weddings, and conferences and conventions.
- **Safety** drove the **lowest sentiment**

		WESTERN CAPE		
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment
▲ Outdoor Activities		32% ▲ 0%	Joy	26 Average
▲ Food + Culinary		16% ▲ 0%	Joy	32 Average
▲ Relaxation + Wellness		16% ▲ 5%	Joy	29 Average
▲ Amenities + Entertainment		10% ▼ 1%	Joy	26 Average
▲ Safety		9% ▲ 4%	Sadness	-14 Average
▲ Destination Services		6% ▼ 2%	Joy	31 Average
▲ Access + Transportation		6% ▼ 5%	Joy	14 Average
▲ Culture + History		5% ▼ 1%	Joy	21 Average

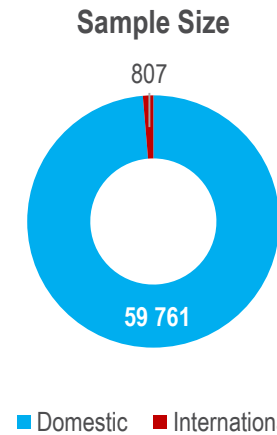
Source: TSI, 2022

Visitor Trends Mobile Location Data Insights

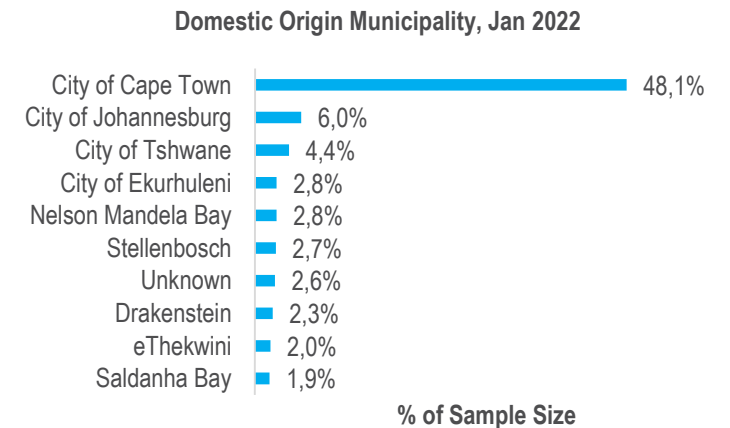
6. Western Cape Mobile Location Data Insights

- 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.

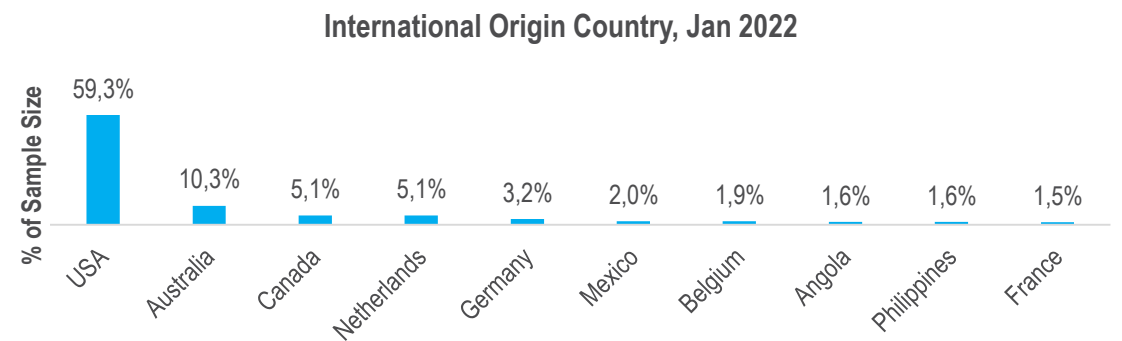
The insights in this report represents mobile location data from a sample of **59 761 domestic** and **807 international** tourists who visited the Western Cape in January 2022. Within the domestic data set, close to half of the sampled tourists were from the City of Cape Town and from the international sampled tourists, close to 60% were from the USA.



Source: Rove, 2022



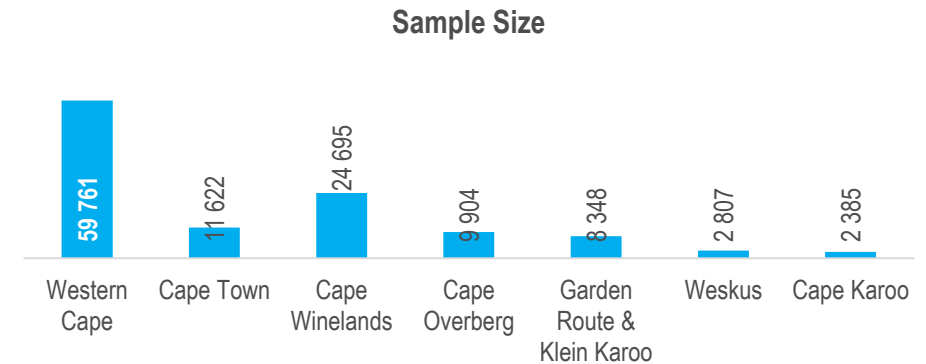
Source: Rove, 2022



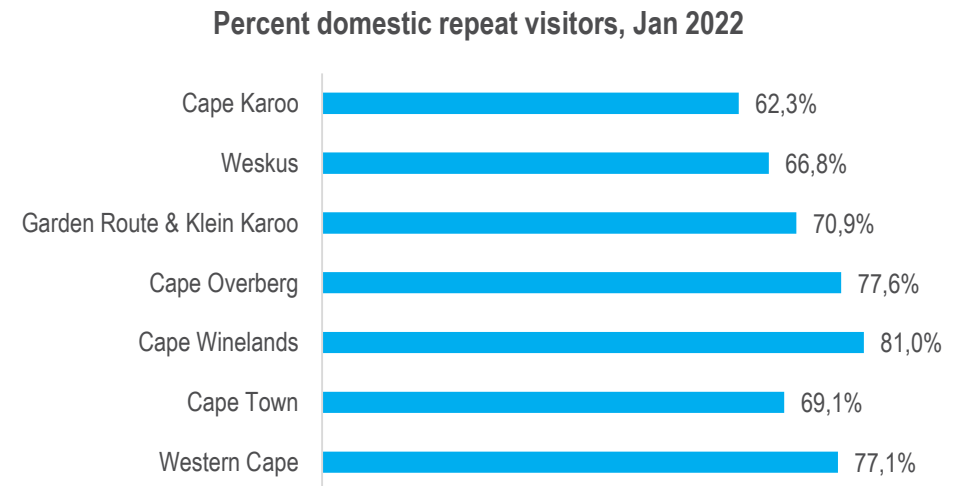
Source: Rove, 2022

6.1. Mobile Insights: Domestic Visitor Trends

- In January 2022, the Cape Winelands (41%) and Cape Town (19%) saw the most domestic visitors in terms of volume of sample size and Cape Karoo (4%) had the least.
- The Cape Winelands (81%) was the most popular region for repeat visits, followed by the Cape Overberg (77,6%). Both regions had a higher repeater rate than the general average for the province (77,1%).



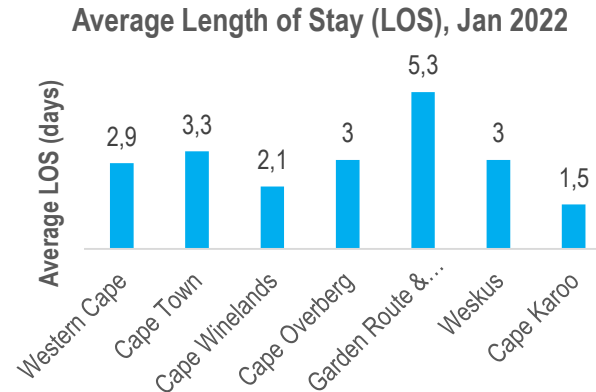
Source: Rove, 2022



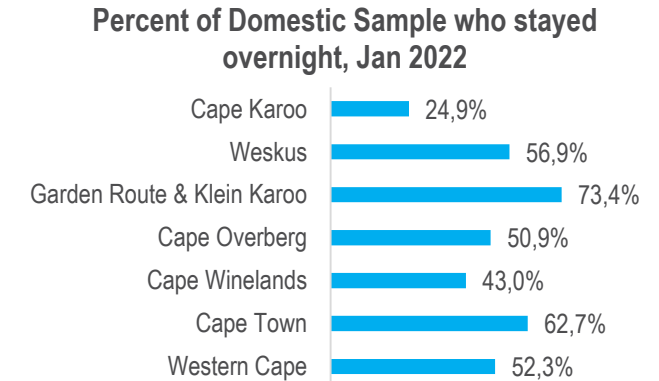
Source: Rove, 2022

6.1. Mobile Insights: Domestic Visitor Trends

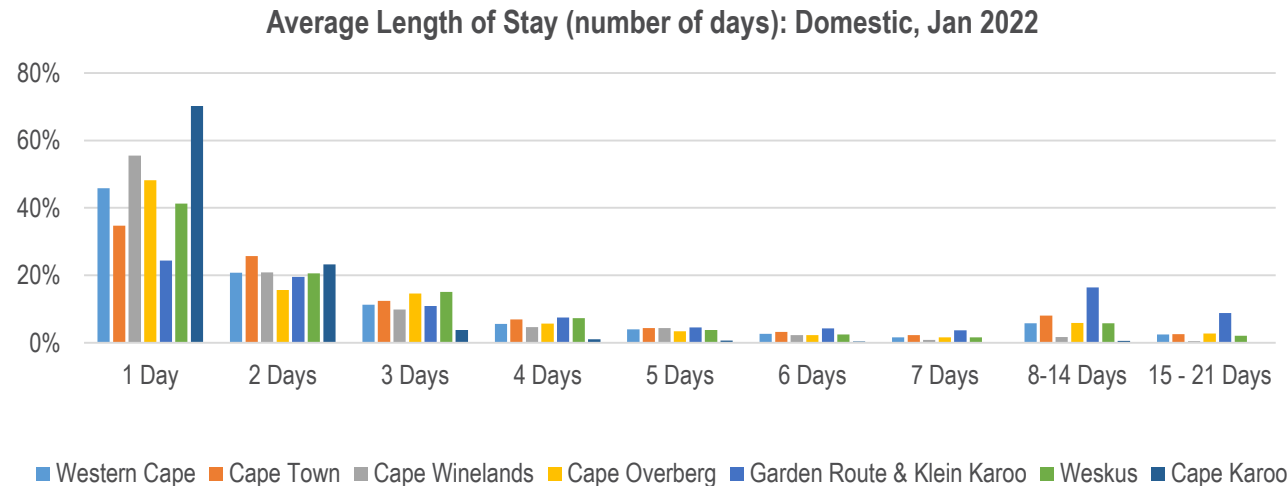
- On average, domestic visitors spent the longest time in the Garden Route & Klein Karoo (5,3 days) and the shortest time in the Cape Karoo (1,5 days).
- Nearly three quarters of sampled tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (52,3%). 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



Source: Rove, 2022

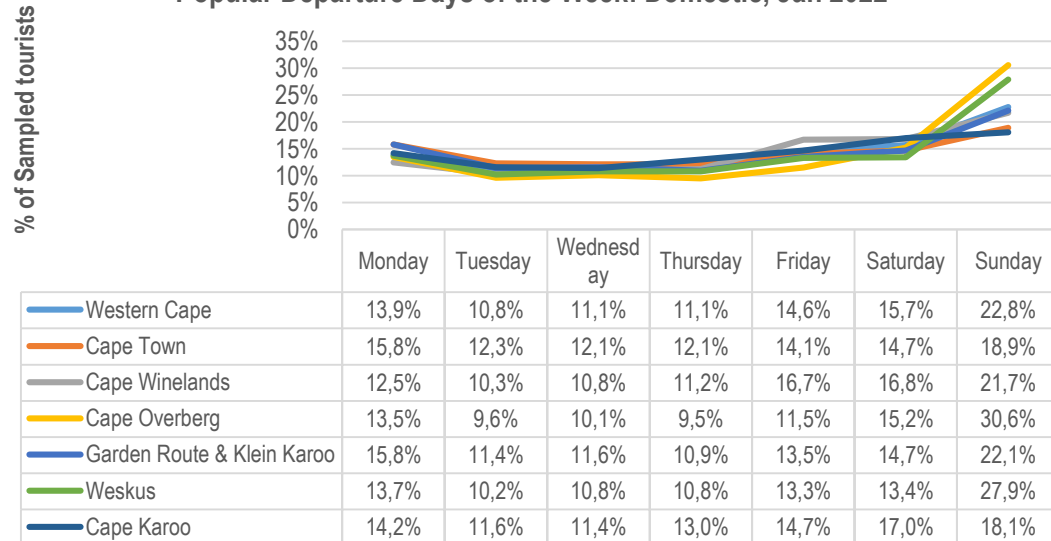


Source: Rove, 2022

6.1. Mobile Insights: Domestic Visitor Trends

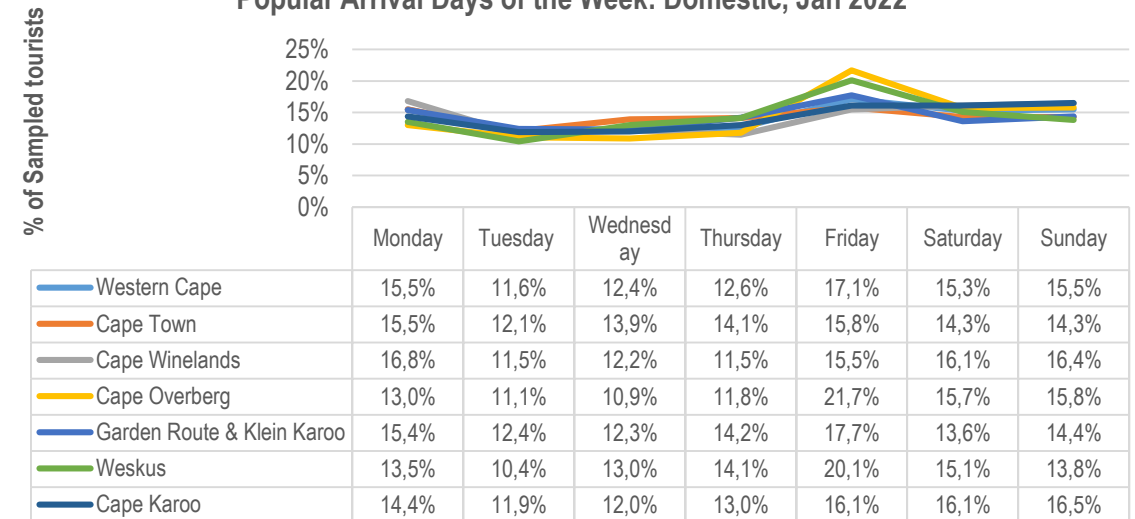
- Domestic visitors to the province are most likely to arrive on a Friday and depart on a Sunday.
- In the Cape Winelands, Monday (16,8%) and Sunday (16,4%) were the most popular arrival days and Sunday was the most common day for departure in January 2022.
- Domestic visitors to the Garden Route & Klein Karoo arrived mostly on a Friday (17,7%) or Monday (15,4%) and departed a Sunday (22,1%) or Monday (15,8%).

Popular Departure Days of the Week: Domestic, Jan 2022



Source: Rove, 2022

Popular Arrival Days of the Week: Domestic, Jan 2022



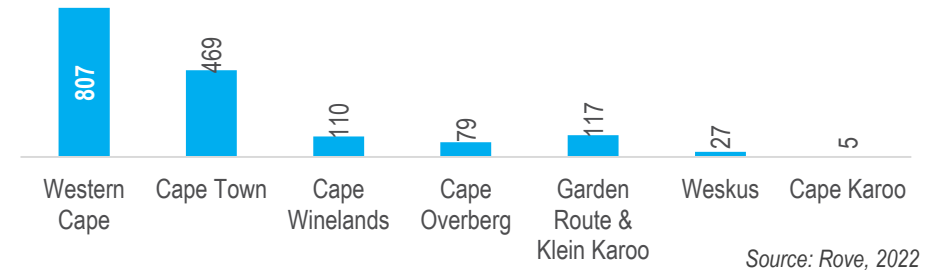
Source: Rove, 2022

- In the Cape Karoo, which saw majority day visitors, Friday, Saturday and Sunday were the most popular arrival and departure days.
- Cape Town arrival days were most common on Friday (15,8%) and Monday (15,5%) and departure was most popular on Sunday (18,9%) and Monday (15,8%).
- Friday (21,7%) was the most popular arrival day in the Cape Overberg and Sunday (30,6%) was its most common departure day.
- In the Weskus, Friday (20,1%) and Sunday (27,9%) were also the most popular arrival and departure days, respectively.

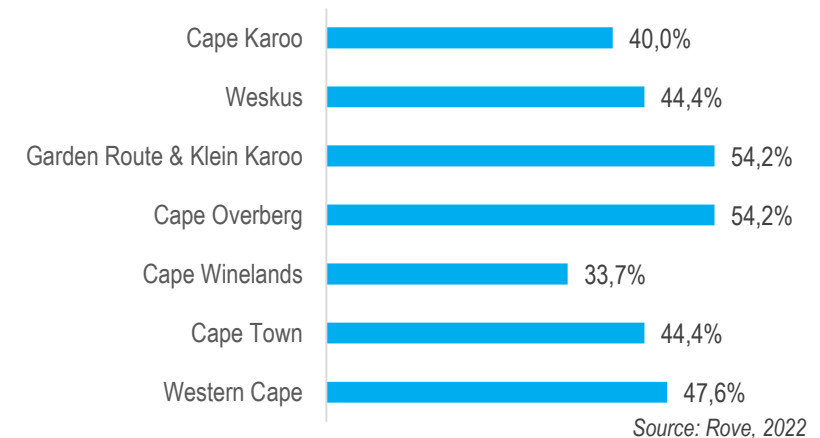
6.2. Mobile Insights: International Visitor Trends

- More than half of the sampled international tourists visited Cape Town followed by Garden Route & Klein Karoo (14%) and Cape Winelands (14%). In terms of volume, the Cape Karoo accounts for less than 1% of sampled international tourists. Visitor trends for that region is based on a sample size of only five international tourists.
- Cape Overberg and the Garden Route & Klein Karoo saw the most international repeat visitors in January 2022

International Sample Size: Jan 2022

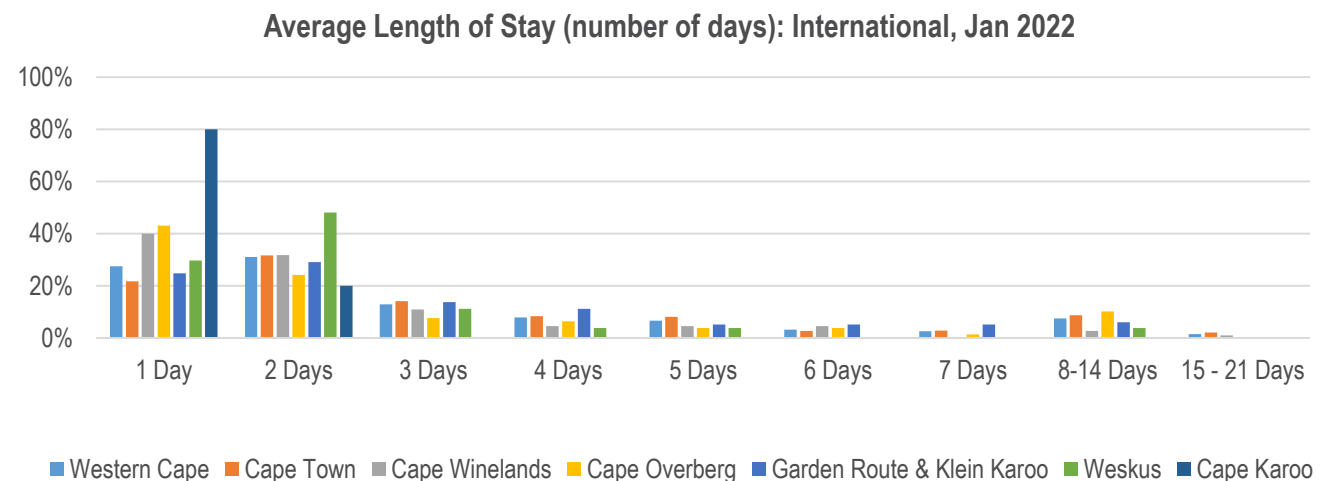
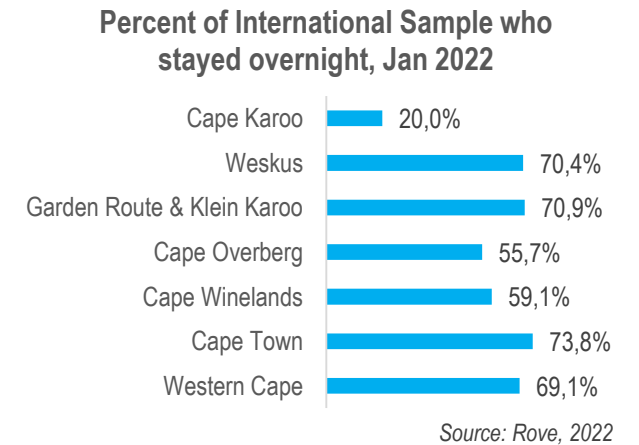
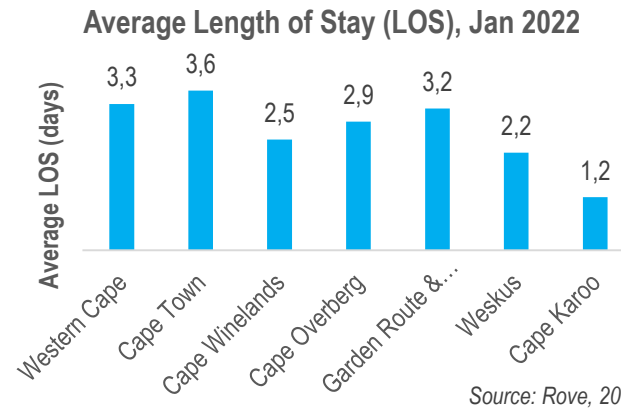


Percent international repeat visitors: Jan 2022



6.2. Mobile Insights: International Visitor Trends

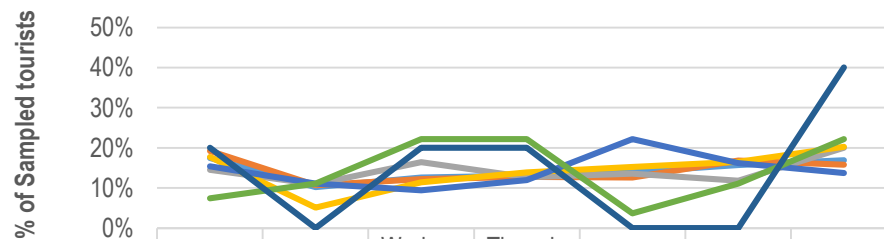
- On average, international visitors spent the longest time in Cape Town (3,6 days) and the shortest time in the Cape Karoo (1,2 days).
- Nearly three quarters of sampled tourists stayed overnight in Cape Town, which is slightly higher than the general average for the province (69,1%). In contrast, visitors to the Cape Karoo were more likely to stay for the day (80%).
- An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.



6.2. Mobile Insights: International Visitor Trends

- International visitors to the province are most likely to arrive on a Saturday or Sunday and depart on Monday or Sunday.
- In the Cape Winelands, Wednesday and Sunday were both the most popular arrival and departure days.
- International visitors to the Garden Route & Klein Karoo arrived mostly on a Friday (16,2%), Saturday (16,2%) or Sunday (21,4%) and departed on a Friday (22,2%) or Saturday (16,2%).

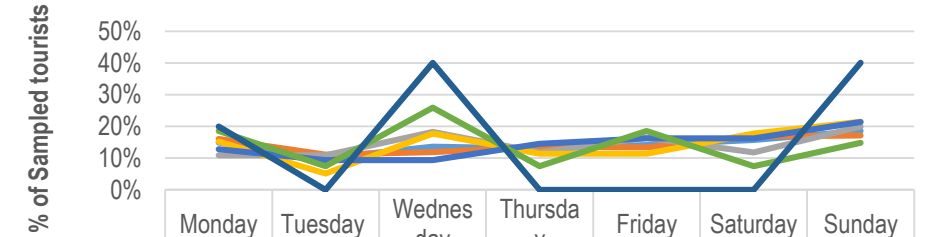
Popular Departure Days of the Week, International, Jan 2022



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	17,5%	10,2%	12,6%	13,1%	14,0%	15,7%	16,9%
Cape Town	19,2%	10,7%	12,2%	12,8%	12,6%	16,8%	15,8%
Cape Winelands	14,5%	10,9%	16,4%	12,7%	13,6%	11,8%	20,0%
Cape Overberg	17,7%	5,1%	11,4%	13,9%	15,2%	16,5%	20,3%
Garden Route & Klein Karoo	15,4%	11,1%	9,4%	12,0%	22,2%	16,2%	13,7%
Weskus	7,4%	11,1%	22,2%	22,2%	3,7%	11,1%	22,2%
Cape Karoo	20,0%	0,0%	20,0%	20,0%	0,0%	0,0%	40,0%

Source: Rove, 2022

Popular Arrival Days of the Week: International, Jan 2022



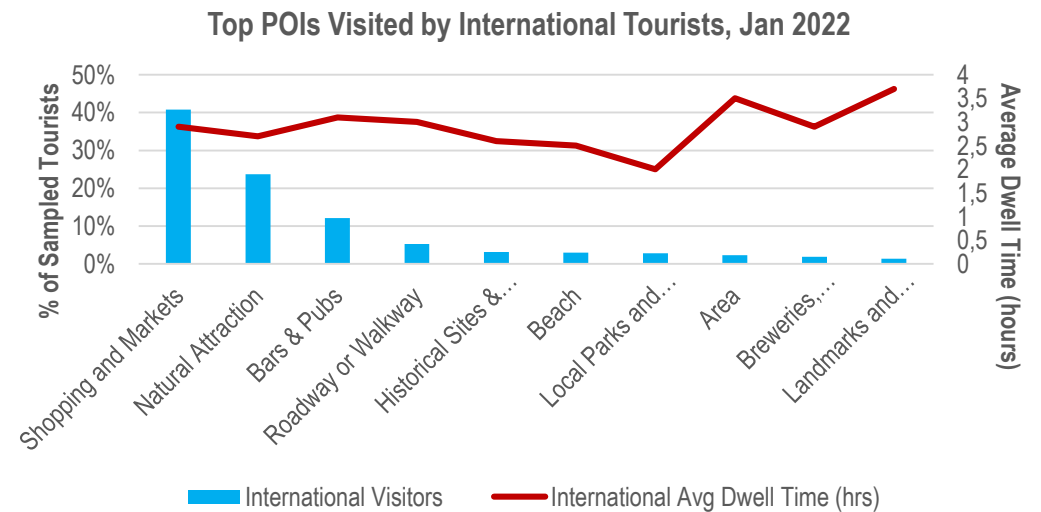
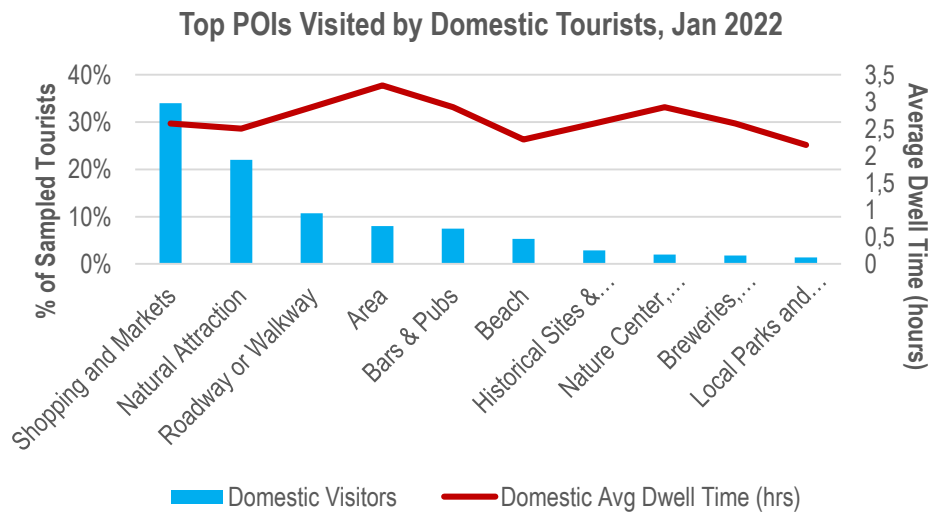
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Western Cape	14,9%	10,0%	13,6%	13,0%	14,1%	15,7%	18,6%
Cape Town	16,0%	11,1%	11,9%	13,6%	13,4%	16,8%	17,1%
Cape Winelands	10,9%	10,9%	18,2%	11,8%	16,4%	11,8%	20,0%
Cape Overberg	15,2%	5,1%	17,7%	11,4%	11,4%	17,7%	21,5%
Garden Route & Klein Karoo	12,8%	9,4%	9,4%	14,5%	16,2%	16,2%	21,4%
Weskus	18,5%	7,4%	25,9%	7,4%	18,5%	7,4%	14,8%
Cape Karoo	20,0%	0,0%	40,0%	0,0%	0,0%	0,0%	40,0%

Source: Rove, 2022

- In the Cape Karoo, which saw majority day visitors, Wednesday and Sunday were popular arrival and departure days.
- Cape Town arrival days were most common on Saturday (16,8%) and Sunday (17,1%) and departure was most popular on Saturday (16,8%) and Monday (19,2%).
- Sunday (21,5%) was the most popular arrival day in the Cape Overberg and it was also the most common departure day (20,3%).
- In the Weskus, Wednesday (25,9%) was the most popular arrival day and Wednesday, Thursday and Sunday were common departure days.

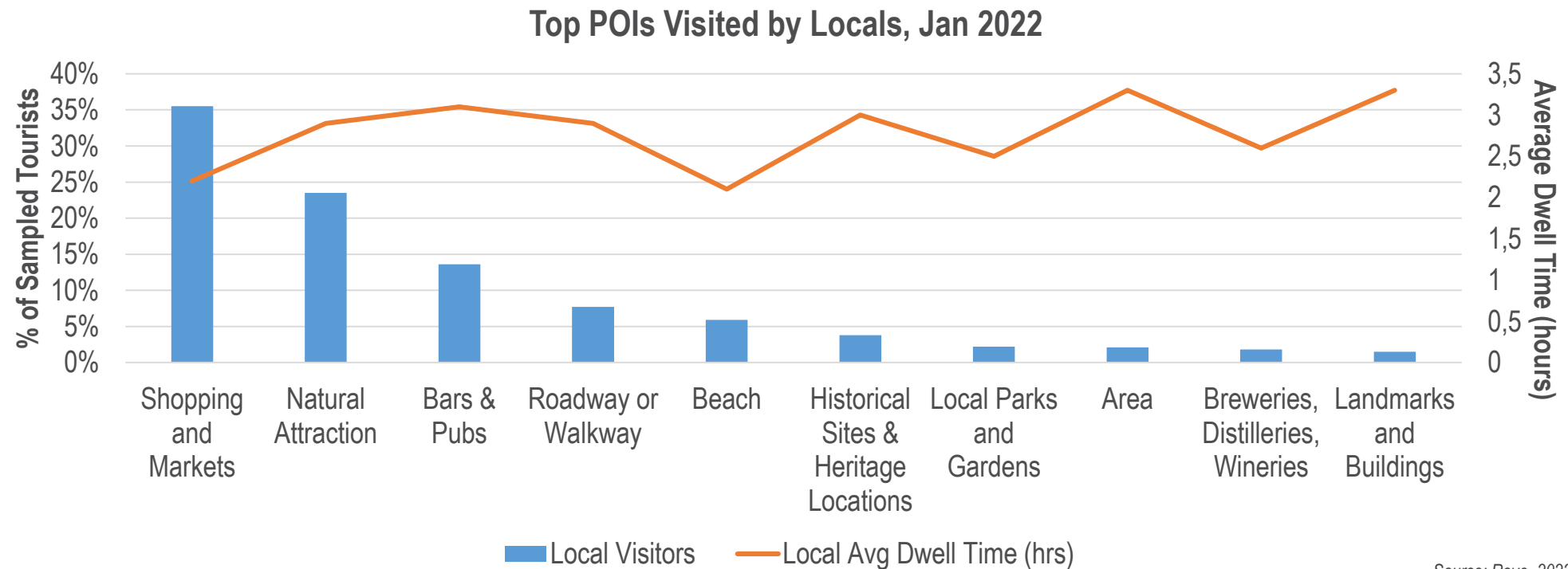
6.3. Points of Interest (POIs) Visited

- Shopping and markets was the most popular type of attraction visited for both domestic and international tourists.
- Domestic visitors spent on average 2,6 hours shopping while international visitors shop for 2,7 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 international tourists who spent on average 3,1 hours at the location.
- Roadways & walkways, which include Stanford Valley, Sea Point Promenade, Hemel-en-Aarde Valley, Clarence Drive and Ashton Bridge, ranked third among the top POIs visited by domestic tourists, with an average dwell time of 2,9 hours.



6.3. 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 2,2 hours at shops and markets, 2,9 hours at natural attractions and 3,1 hours at bars and pubs.

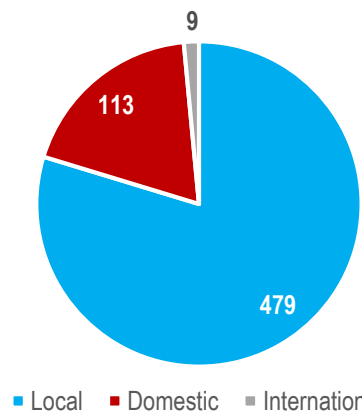


Source: Rove, 2022

6.4. Stellenbosch Valley Wine Route

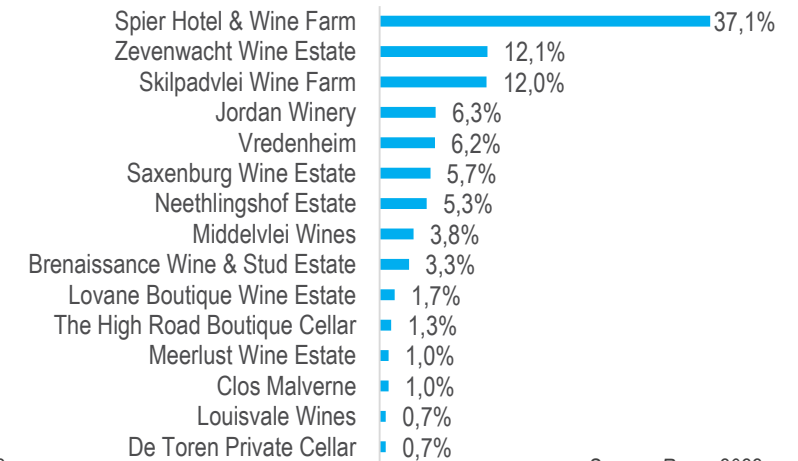
- From a sample size of 601 tourists who visited the Stellenbosch Wine Route close to 80% were locals, 19% were domestic and just over 1% were international tourists.
- Spier was the most visited farm on the route, followed by Zevenwacht and Skilpadvlei. De Toren had the longest dwell time, however this is based on data from only 5 tourists.

Sample Size - Visitors to Stellenbosch Wine Valley, Jan 2022



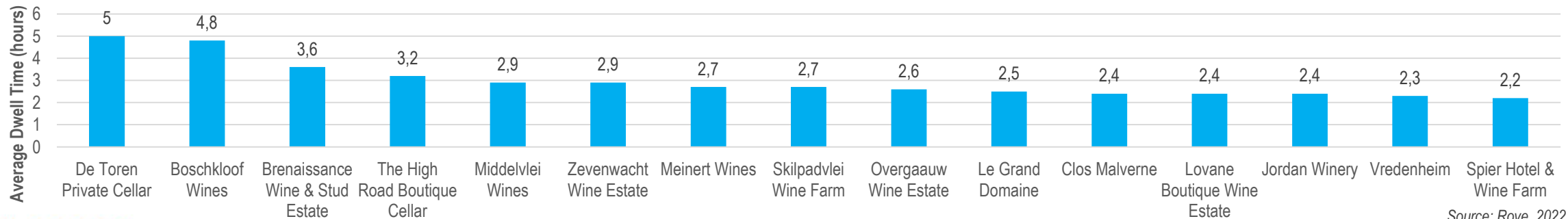
Source: Rove, 2022

Stellenbosch Valley Wine Route: Top POIs Visited, Jan 2022



Source: Rove, 2022

Stellenbosch Valley Wine Route: Time spent at POIs, Jan 2022



Source: Rove, 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.)

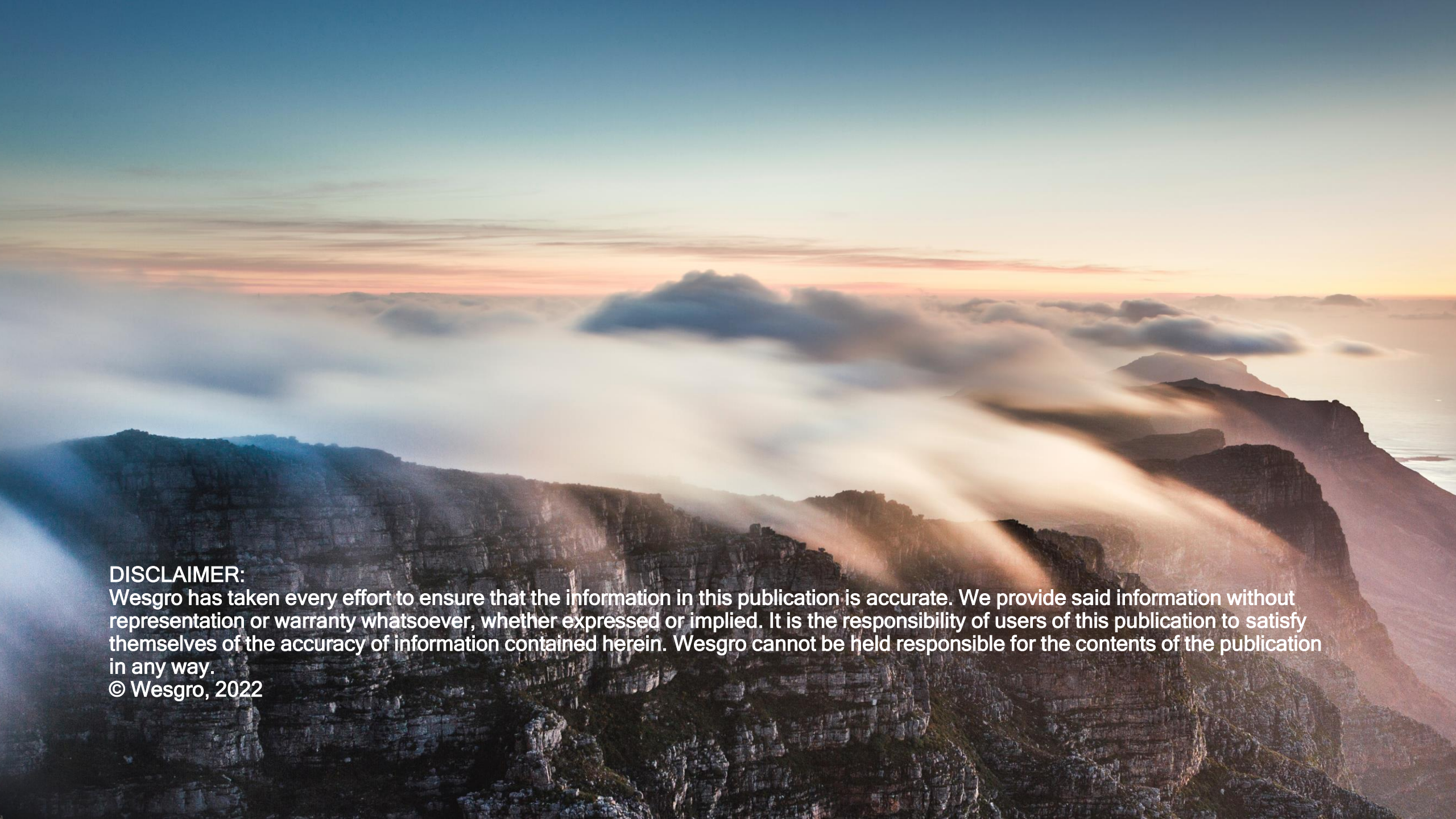
Source: Rove, 2022

Mobile Tourists and Non-Tourists Definitions

Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Cape Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have traveled more than 25 miles (40km) and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists Minimum distance traveled to meet the definition of tourist. Distance travelled is calculated from the visitors Common Evening Location (latitude and longitude) to the center of the polygon Minimum duration of visit of 120 minutes excludes commuters driving through each region 		
Secondary Study Geography		Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as a tourist of the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon 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: <ul style="list-style-type: none"> Any 90 day period refers to any consecutive 90 days in their mobile location data history Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.). Filter out people who work at the Tourism Experience. 		
What are Tourist Segments?		
<ul style="list-style-type: none"> Local Tourists: Tourists who reside within the same Region. Domestic Tourists: Tourists who reside in South Africa outside of Western Cape International Tourists: Tourists who reside outside of South Africa 		

Glossary of Key Terms

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



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