

Tourism Research Overview February 2024

Cape Town & the Western Cape

WESGRO

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

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Key Findings

- Growth in passenger movement through the Cape Town International Airport (CTIA) remained steady into the first two months of 2024, with both the domestic and international terminals recording double digit year-on-year growth rates in both January and February 2024.
- CTIA's **international terminal** saw a 14% year-on-year growth in February 2024, with 294,443 two-way passengers, maintaining a steady growth rate on the back of a 13% increase recorded in January 2024. The **domestic terminal** recorded a 14% year-on-year growth in February 2024, with over 576 000 two-way passengers passing through the terminal. **George Airport** recorded over 59,000 two-way passengers in February 2024 and in relation to February 2019, passenger movement recovered by 95%. (Source: ACSA)
- The collective total of air arrivals to Cape Town between January and February 2024 surpassed the 200,000 mark and exceeded the 2019 figure of 194,058. In February 2024, 92% of the air arrivals to Cape Town were from overseas markets and 8% were from the rest of Africa. (Source: StatsSA)
- Between January and February 2024, UK led as the top overseas air market to Cape Town, with Germany a very close second, followed by the USA, Netherlands and France in the top 5 positions. The first two months of 2024 reflects a strong European presence, with 8 out of the top 10 source markets originating from that continent. Air arrivals to Cape Town during the period Jan – Feb 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan – Feb 2019. These markets included the UK (115%), Germany (122%), USA (167%), Netherlands (133%), Canada (119%), Belgium (141%) and Italy (105%).
- Between January and February 2024, Namibia led as the top air market from the rest of Africa to Cape Town, with Zimbabwe following closely in second position. Mozambique, Angola and Kenya followed in the rest of the top 5 positions. Air arrivals from the rest of Africa to Cape Town during the period Jan – Feb 2024 reflected full recovery from 7 out of the top 10 Africa source markets to Cape Town vs. Jan – Feb 2019. These markets included Zimbabwe (135%), Mozambique (18100%), Kenya (202%), Nigeria (112%), Tanzania (176%), Ghana (304%) and Botswana (1129%).
- 43 participating attractions across the six regions of the Western Cape recorded a total of 1,703,804 visitors between January and February 2024, a 20% growth in the number of visitors when compared to January – February 2023. The top 5 participating Western Cape attractions with the highest volume of visitors between January and February 2024 were recorded for: Table Mountain National Park (641,486), Table Mountain Aerial Cableway (227,511), Table Mountain National Park: Cape of Good Hope (199,781), Table Mountain National Park: Boulders (171,754) and Kirstenbosch National Botanical Garden (136,422).
- The top 5 highest year-on-year growth rates between January and February 2024 were recorded amongst the Western Cape's nature/outdoor attractions: Stony Point Eco Venue (476%), Grootvadersbosch Eco Venues (386%), De Hoop Nature Reserve (188%), Gamkaberg Nature Reserve (135%) and Kogelberg Nature Reserve (130%).

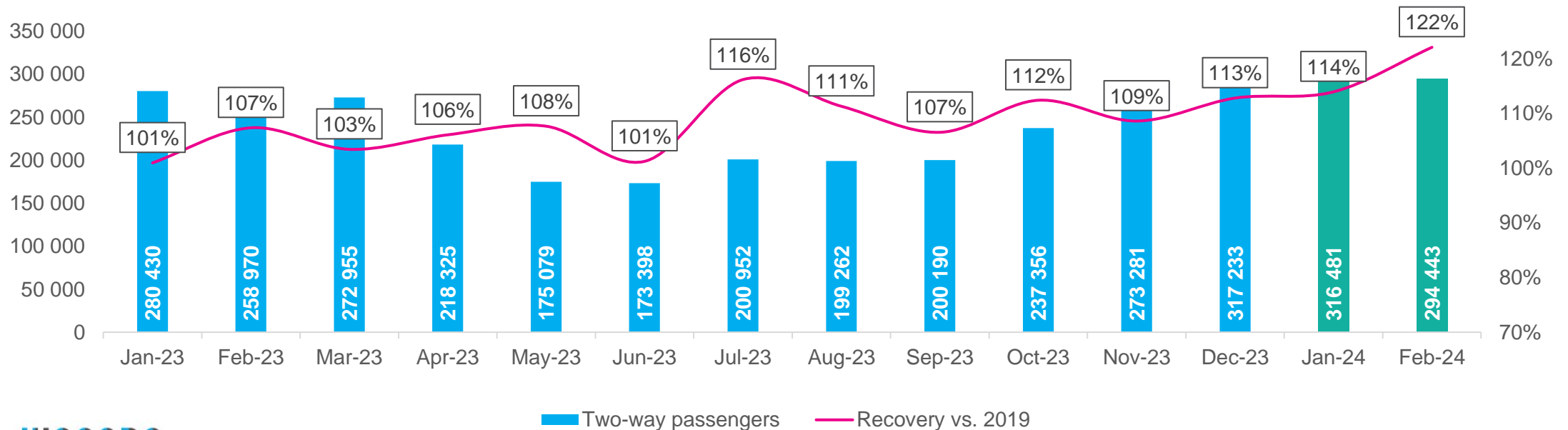
Cape Town International Airport (CTIA): International Terminal

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 | 2023 | | | | 2024 | |
|------------------------|-----------|---------|---------|-----------|-----------|---------|---------|---------|---------|---------|---------|
| | | | | | | Sept | Oct | Nov | Dec | Jan | Feb |
| Two-way passengers | 2 606 398 | 810 811 | 525 441 | 1 895 975 | 2 807 431 | 200 190 | 237 356 | 273 281 | 317 233 | 316 481 | 294 443 |
| YoY growth percentage* | 1% | -69% | -35% | 261% | 48% | 31% | 35% | 29% | 17% | 13% | 14% |

* Growth compared to the same period in the previous year

Passenger data source: ACSA

Recovery percentage full year 2023 = 108%
Recovery percentage year-to-date 2024 = 118%



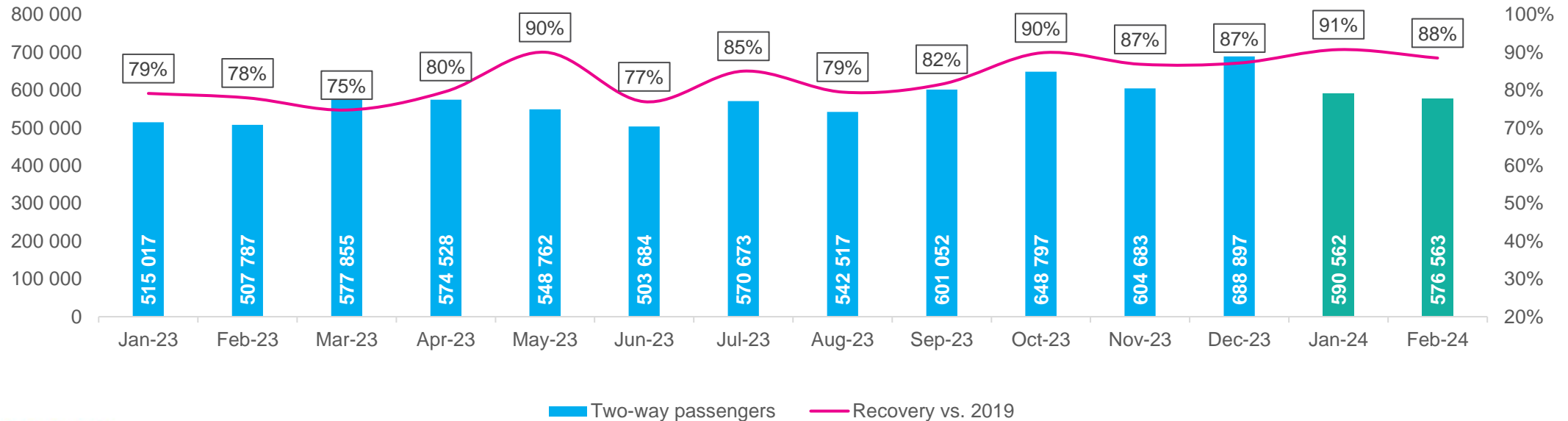
Cape Town International Airport (CTIA): Domestic Terminal

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 | 2023 | | | | 2024 | |
|------------------------|-----------|-----------|-----------|-----------|-----------|---------|---------|---------|---------|---------|---------|
| | | | | | | Sept | Oct | Nov | Dec | Jan | Feb |
| Two-way passengers | 8 363 307 | 3 167 542 | 4 221 365 | 5 960 826 | 6 884 252 | 601 052 | 648 797 | 604 683 | 688 897 | 590 562 | 576 563 |
| YoY growth percentage* | 2% | -62% | 33% | 41% | 16% | 24% | 23% | 19% | 21% | 15% | 14% |

* Growth compared to the same period in the previous year

Passenger data source: ACSA

Recovery percentage full year 2023 = **82%**
 Recovery percentage year-to-date 2024 = **90%**



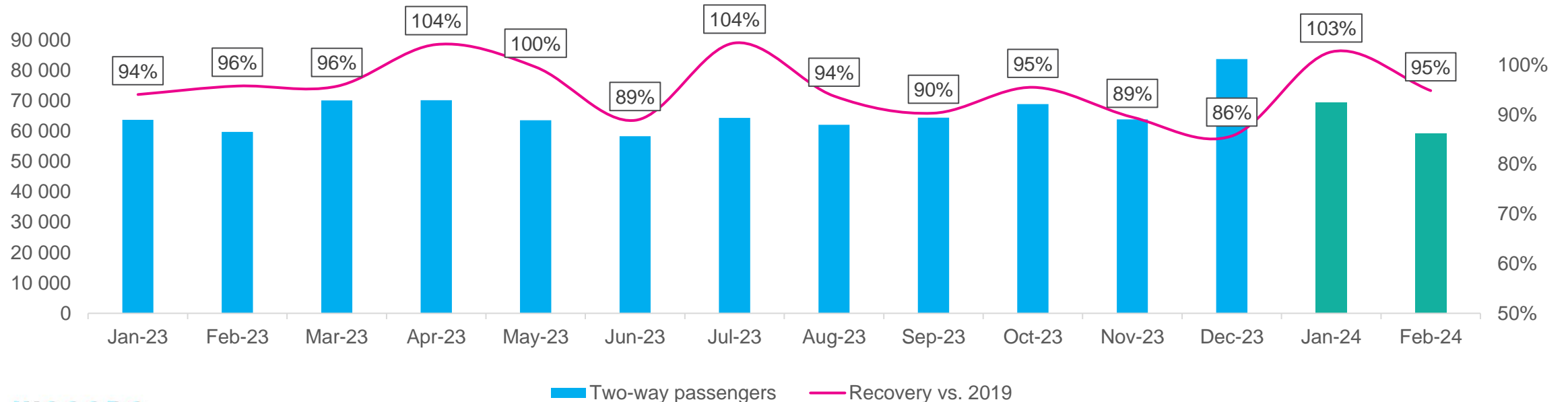
George Airport (GRJ) passenger performance: Feb 2024

| Year/Month | 2019 | 2020 | 2021 | 2022 | 2023 | 2023 | | | | 2024 | |
|------------------------|---------|---------|---------|---------|---------|--------|--------|--------|--------|--------|--------|
| | | | | | | Sept | Oct | Nov | Dec | Jan | Feb |
| Two-way passengers | 840 804 | 346 223 | 539 637 | 747 848 | 792 735 | 64 428 | 68 850 | 63 828 | 83 710 | 69 481 | 59 167 |
| YoY change percentage* | 0.5% | -59% | 56% | 39% | 6% | 5% | 7% | 7% | 31% | 9% | -1% |

* Growth compared to the same period in the previous year

Data source: ACSA

Recovery percentage full year 2023 = 95%
Recovery percentage year-to-date 2024 = 99%



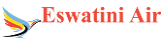









CPT International schedule




IATA Winter 2023/24 (Nov – Mar)

25 airlines
30 destinations
36 routes
215 flights per week

Rest of Africa

| | | |
|--|---------------------------|---|
|  | Air Botswana | Gaborone (GBE) 3x per week |
|  | Air Mauritius | Mauritius (MRU) 2x week* *3x per week from 01 Dec – 02 April |
|  | Airlink | Windhoek (WDH) 2x a day Walvis Bay (WVB) Daily Harare (HRE) Daily Victoria Falls (VFA) 6x week Maun (MUB) Daily Maputo (MPM) 4x week |
|  | Eswatini Air | Manzini (SHO) 3x week |
|  | Ethiopian Airlines | Addis Ababa (ADD) 11x per week |
|  | FlyNamibia | Windhoek (WDH) 6x per week Walvis Bay (WVB) 4x per week |
|  | Kenya Airways | Nairobi (NBO) 3x week, NBO – Livingstone (LVI) 2x week NBO – Victoria Falls (VFA) 3x week |
|  | Proflight Zambia | Lusaka (LUN) 3x week |
|  | RwandAir | Kigali (KGL) - Harare (HRE) 6x week |
|  | TAAG | Luanda (LAD) Daily |
|  | LAM Mozambique | Maputo (MPM) 3x week |




Asia & Middle East

| | | |
|---|---------------------------|--|
|  | Emirates | Dubai (DXB) 2x Daily |
|  | Qatar Airways | Doha (DOH) 2x Daily |
|  | Singapore Airlines | Singapore (SIN)* Daily *SIN-JNB-CPT-JNB-SIN |

Europe

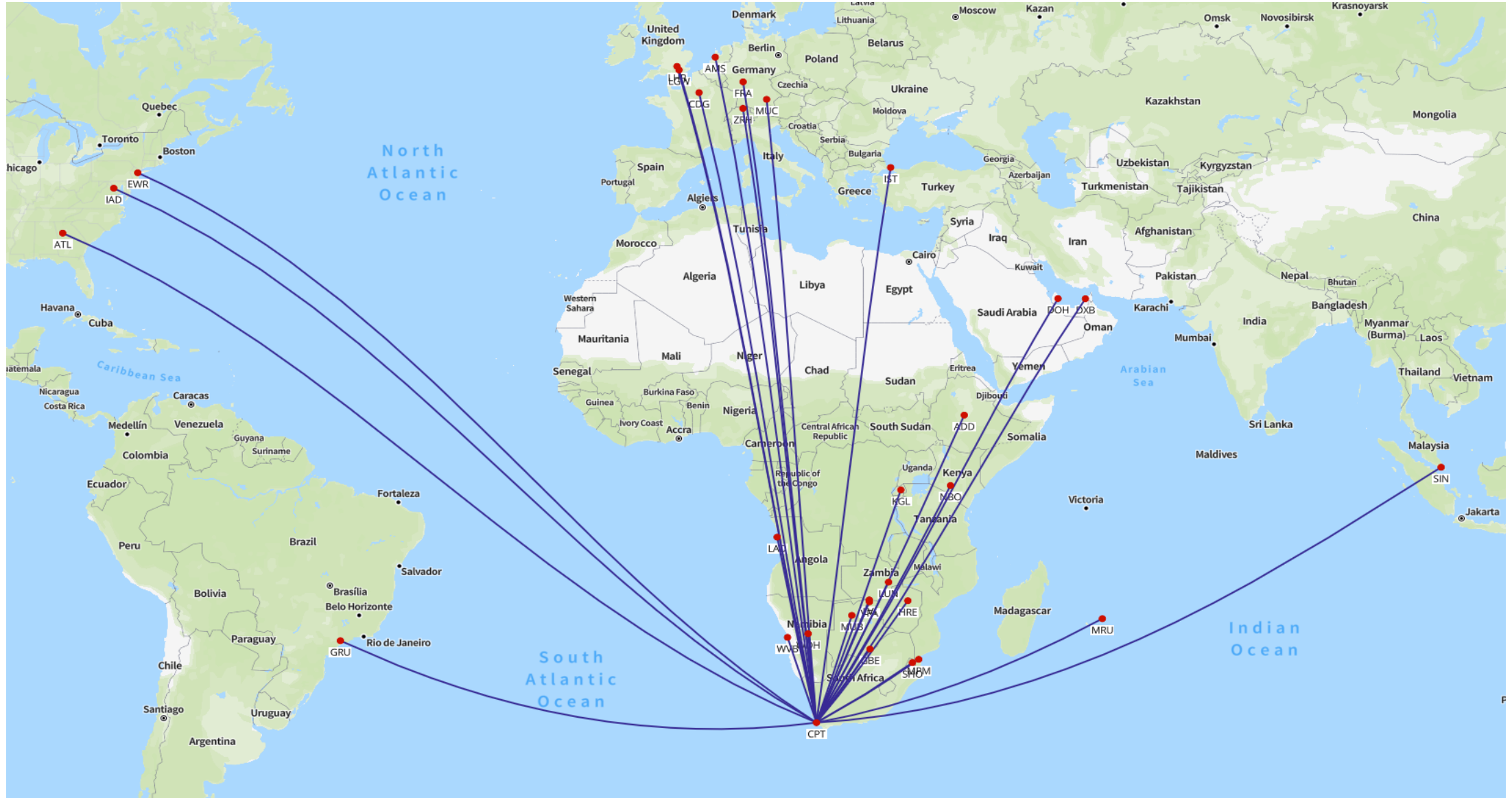
| | | |
|---|-------------------------|--|
|  | Air France | Paris (CDG)* 3x per week** *Seasonal **5x per week from 17 Jan – 27 Feb |
|  | British Airways | London Heathrow (LHR) 2x Daily London Gatwick (LGW)* 3x per week *Seasonal |
|  | Condor | Frankfurt (FRA)* 5x per week *Seasonal |
|  | Edelweiss | Zurich (ZRH)* 4x per week *Seasonal |
|  | KLM | Amsterdam (AMS) Daily |
|  | Lufthansa | Frankfurt (FRA) Daily Munich (MUC)* 5x per week *Seasonal |
|  | Turkish Airlines | Istanbul (IST) Daily |
|  | Virgin Atlantic | London Heathrow (LHR)* Daily *Seasonal |

North & South America

| | | |
|---|------------------------------|--|
|  | Delta Air Lines | Atlanta (ATL) 3x per week Triangular* 4x per week *ATL-JNB-CPT-ATL |
|  | United Airlines | Newark (EWR) 3x per week Washington D.C (IAD) 3x per week |
|  | South African Airways | São Paulo (GRU) 2x per week |

Source: Cape Town Air Access

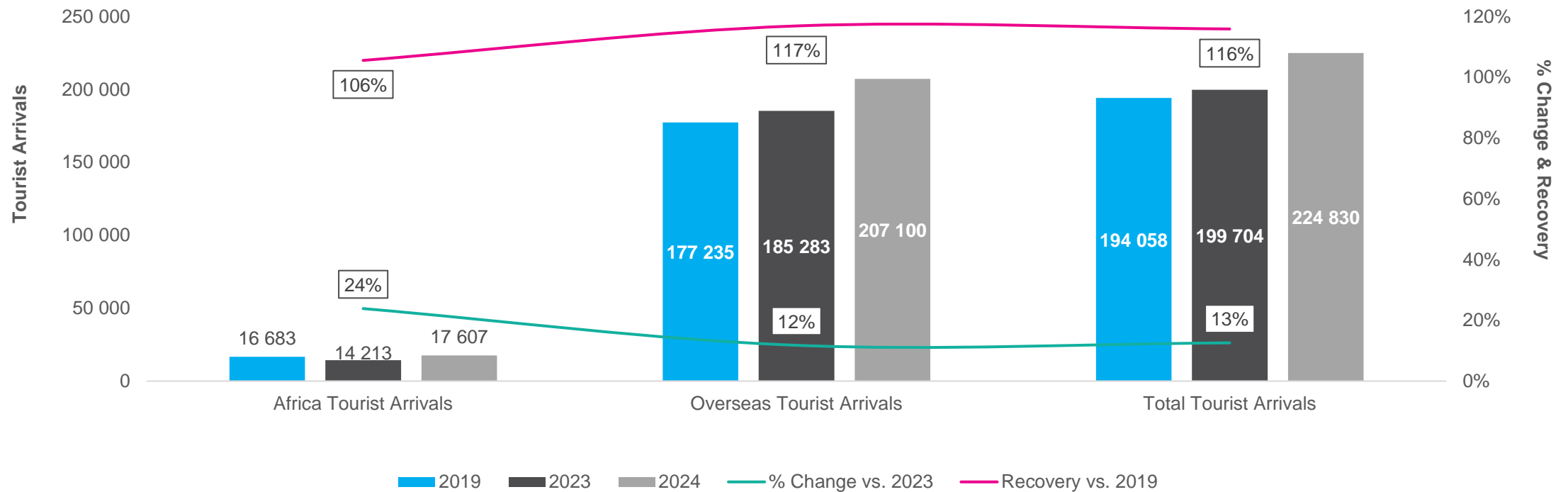
IATA winter season route network (November 2023 - March 2024)



Performance of Air Arrivals to Cape Town: Jan – Feb 2024

Cape Town air arrivals surpassed the **200,000** mark between January and February 2024 and exceeded the 2019 figure of 194,058. In February 2024, 92% of air arrivals to Cape Town were from overseas markets and 8% from the rest of Africa.

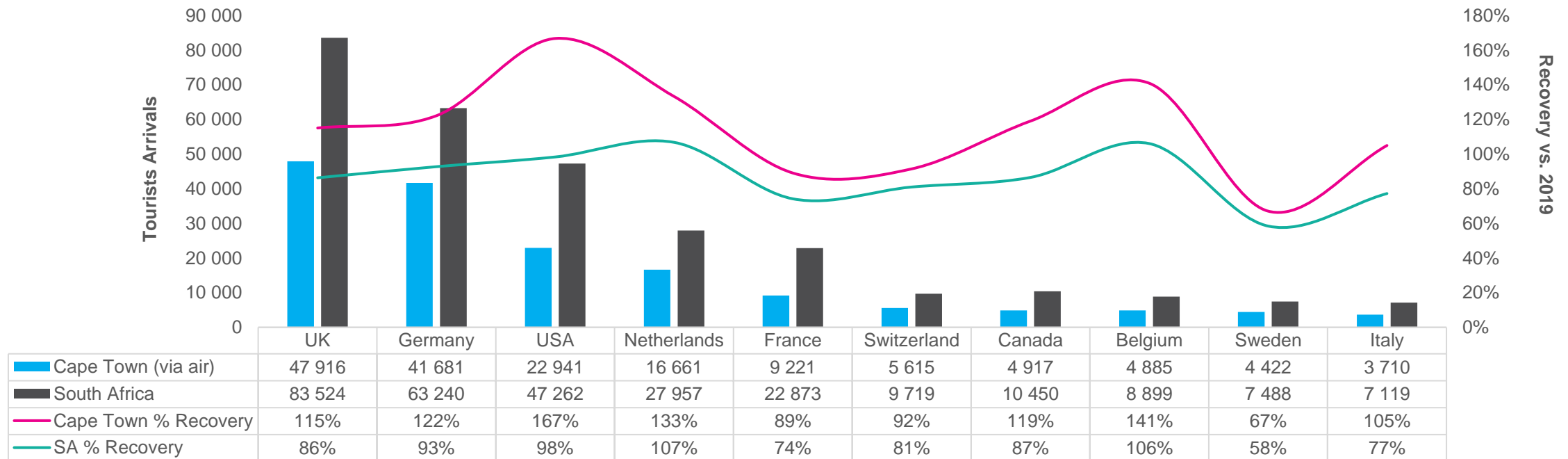
Tourist Arrivals to Cape Town (via air) by Origin, Jan - Feb 2024



Top Overseas Markets to Cape Town (via air): Jan – Feb 2024

- Between January and February 2024, the UK led as the top overseas air market to Cape Town, with Germany a very close second, followed by USA, Netherlands and France in the rest of the top 5 positions. The first two months of 2024 showed a strong European presence, with 8 out of the top 10 source markets originating from the continent.
- Air arrivals to Cape Town during the period Jan – Feb 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan – Feb 2019. These markets included the UK (115%), Germany (122%), USA (167%), Netherlands (133%), Canada (119%), Belgium (141%) and Italy (105%).

Overseas Tourist Arrivals to Cape Town (via air) and South Africa, Jan - Feb 2024



Source: StatsSA, 2024

Top Africa Markets to Cape Town (via air): Jan – Feb 2024

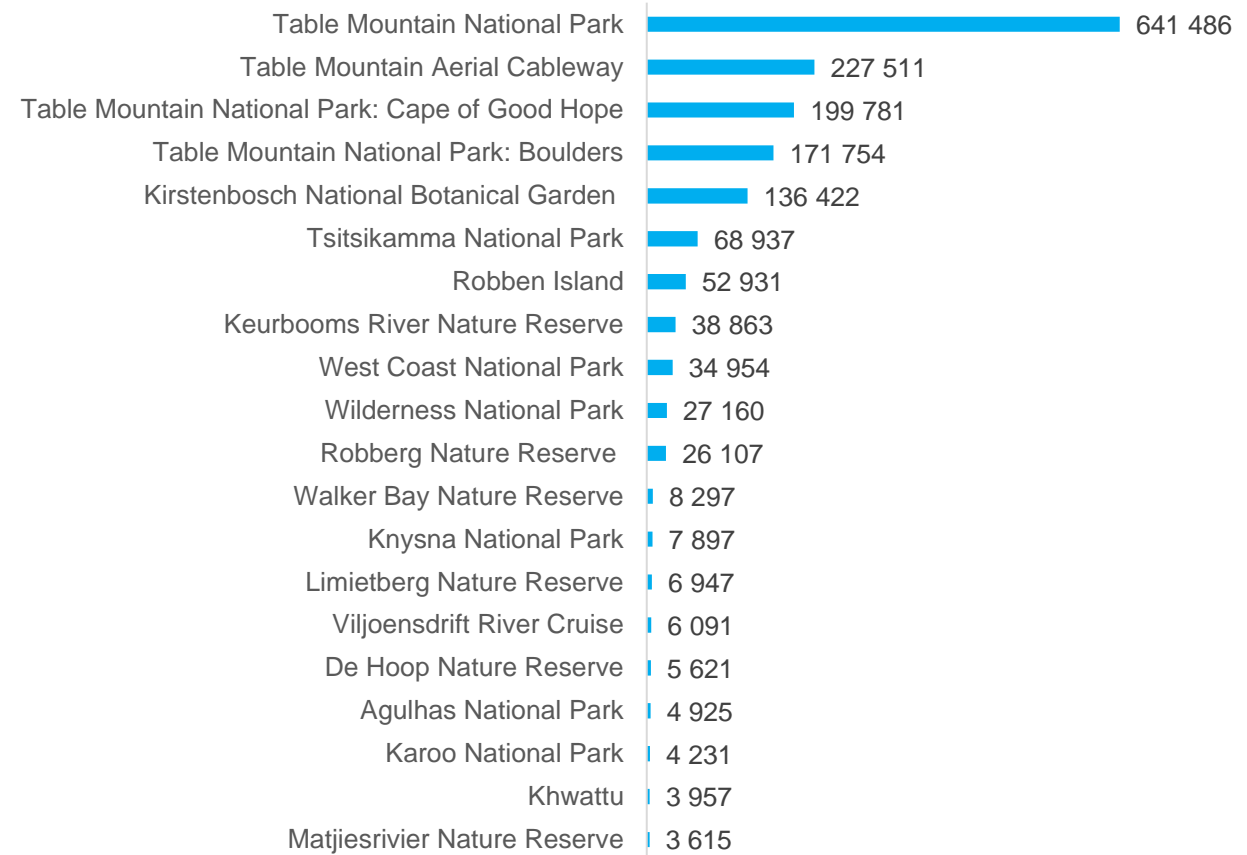
- Between January and February 2024, Namibia led as the top air market from the rest of Africa to Cape Town, with Zimbabwe in a very close second position. Mozambique, Angola and Kenya followed in the rest of the top 5 positions.
- Air arrivals to Cape Town from the rest of Africa during the period Jan – Feb 2024 reflected full recovery from 7 out of the top 10 source markets to Cape Town vs. Jan – Feb 2019. These markets included Zimbabwe (135%), Mozambique (18100%), Kenya (202%), Nigeria (112%), Tanzania (176%), Ghana (304%) and Botswana (1129%).
- The aviation connectivity between Cape Town and the rest of Africa remains in an upward recovery trajectory from the pandemic, and the aviation sector continues to show possibilities of more connectivity between Cape Town and African destinations in the year 2024.

| Ranking | Africa Source Market | Tourists to Cape Town (via air) Jan - Feb 2024 | Tourists to South Africa Jan - Feb 2024 | Cape Town % Recovery vs. 2019 | South Africa % Recovery vs. 2019 |
|---------|----------------------|---|--|----------------------------------|-------------------------------------|
| 1 | Namibia | 2 598 | 23 810 | 72% | 85% |
| 2 | Zimbabwe | 2 556 | 443 096 | 135% | 98% |
| 3 | Mozambique | 2 353 | 298 160 | 18100% | 111% |
| 4 | Angola | 2 224 | 6 304 | 42% | 44% |
| 5 | Kenya | 1 720 | 6 442 | 202% | 135% |
| 6 | Mauritius | 996 | 2 840 | 93% | 80% |
| 7 | Nigeria | 638 | 3 737 | 112% | 47% |
| 8 | Tanzania | 600 | 5 676 | 176% | 95% |
| 9 | Ghana | 586 | 4 983 | 304% | 149% |
| 10 | Botswana | 576 | 52 615 | 1129% | 66% |

Performance of Western Cape Attractions, Jan – Feb 2024

- 43 participating attractions across the six regions of the Western Cape recorded a total of 1,703,804 visitors between January and February 2024, a 20% growth in the number of visitors when compared to January – February 2023.
- The top 5 participating Western Cape attractions with the highest volume of visitors between January and February 2024 were recorded for:
 1. Table Mountain National Park (641,486)
 2. Table Mountain Aerial Cableway (227,511)
 3. Table Mountain National Park: Cape of Good Hope (199,781)
 4. Table Mountain National Park: Boulders (171,754)
 5. Kirstenbosch National Botanical Garden (136,422)
- The top 5 highest year-on-year growth rates for the period January to February 2024 were recorded amongst the Western Cape’s nature/outdoor attractions:
 1. Stony Point Eco Venue (476%)
 2. Grootvadersbosch Eco Venues (386%)
 3. De Hoop Nature Reserve (188%)
 4. Gamkaberg Nature Reserve (135%)
 5. Kogelberg Nature Reserve (130%)

Top 20 Participating Western Cape Attractions, Jan–Feb 2024



Sources: LTOs and Attractions, 2024

Performance of Western Cape Attractions, Jan – Feb 2024 Continued...

| Western Cape Attractions | Jan-Feb 2023 | Jan-Feb 2024 | Jan-Feb 2023/2024 % Change |
|---|--------------|--------------|----------------------------|
| Cape Town | | | |
| Table Mountain National Park | 521 029 | 641 486 | 23% |
| Table Mountain Aerial Cableway | 191 204 | 227 511 | 19% |
| Table Mountain National Park: Cape of Good Hope | 171 620 | 199 781 | 16% |
| Table Mountain National Park: Boulders | 134 154 | 171 754 | 28% |
| Kirstenbosch | 143 492 | 136 422 | -5% |
| Robben Island | 47 515 | 52 931 | 11% |
| Overberg | | | |
| Agulhas National Park | 6 119 | 4 925 | -20% |
| Walker Bay Nature Reserve | 4 439 | 8 297 | 87% |
| De Hoop Nature Reserve | 1 951 | 5 621 | 188% |
| Kogelberg Nature Reserve | 1 452 | 3 335 | 130% |
| Bontebok National Park | 2 956 | 3 157 | 7% |
| Marloth Nature Reserve | 1 502 | 1 548 | 3% |
| Grootvadersbosch Nature Reserve | 1 280 | 1503 | 17% |
| Grootvadersbosch Eco Venues | 49 | 238 | 386% |
| Stony Point Eco Venue | 34 | 196 | 476% |
| Garden Route & Klein Karoo | | | |
| Tsitsikamma National Park | 50 740 | 68 937 | 36% |
| Keurbooms River Nature Reserve | 20 023 | 38 863 | 94% |
| Wilderness National Park | 22 627 | 27 160 | 20% |
| Robberg Nature Reserve | 19 801 | 26 107 | 32% |
| Knysna National Park | 6 944 | 7 897 | 14% |
| Goukamma Nature Reserve | 595 | 361 | -39% |

| Weskus | Jan-Feb 2023 | Jan-Feb 2024 | Jan-Feb 2023/2024 % Change |
|-----------------------------------|------------------|------------------|----------------------------|
| West Coast National Park | 32 151 | 34 954 | 9% |
| Khwattu | 3 736 | 3 957 | 6% |
| Matjiesrivier Nature Reserve | 1 652 | 3 615 | 119% |
| Cederberg-Algeria Nature Reserve | 2 416 | 3 135 | 30% |
| Bird Island Nature Reserve | 2 063 | 2 517 | 22% |
| Groot Winterhoek Wilderness Area | 802 | 935 | 17% |
| Rocherpan Nature Reserve | 332 | 356 | 7% |
| Cederberg-Kliphuis Nature Reserve | 239 | 257 | 8% |
| Winelands | | | |
| Limietberg Nature Reserve | 7 631 | 6 947 | -9% |
| Viljoensdrift River Cruise | 2 763 | 6091 | 120% |
| Jonkershoek Nature Reserve | 2 360 | 2 224 | -6% |
| Birds Paradise | 1 360 | 2 078 | 53% |
| Vrolijkheid Nature Reserve | 1 009 | 1 126 | 12% |
| Hottentots Holland Nature Reserve | 735 | 994 | 35% |
| Assegaaibosch Nature Reserve | 576 | 985 | 71% |
| Protea Tractor Trip | 556 | 808 | 45% |
| Vrolijkheid Eco Venue | 9 | 128 | 1322% |
| Cape Karoo | | | |
| Karoo National Park | 4 585 | 4 231 | -8% |
| Gamkaberg Nature Reserve | 124 | 291 | 135% |
| Anysberg Nature Reserve | 64 | 109 | 70% |
| Swartberg Nature Reserve | 21 | 36 | 71% |
| Total | 1,414,713 | 1,703,804 | 20% |

NB: Total number of visitors ranked from highest to lowest by region

Sources: LTOs and Attractions, 2024

Visitor Trends Mobile Location Data Insights

Jan – Feb 2024

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.

Factors influencing the International and Domestic Sample Counts:

The volume of mobile location data capture counts is influenced by several factors including but not limited to:

Data Source Variability

- Changing volume of mobile applications collecting and sharing data
- Data privacy and regulatory changes affecting sharing of data (GDPR, mobile OS policy changes etc.)

Data Collection and Processing Variability

- Mobile network and internet connectivity
- Mobile infrastructure technical issues (hardware failures, solar flare activity)
- Tourist logic to segment tourist from non-tourist mobile devices

Mobile Use Variability

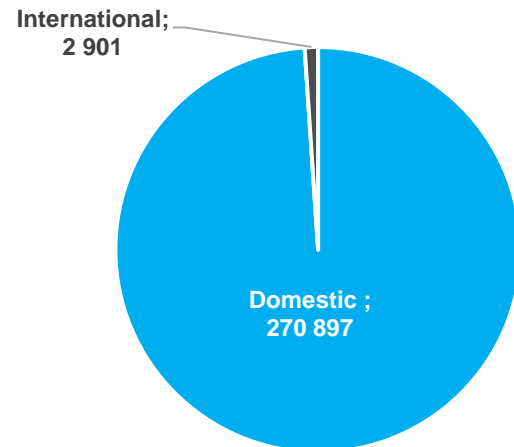
- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

While all mobile devices are affected by above, International mobile device counts are affected more than Domestic mobile devices when it comes to both mobile use fluctuations and data privacy restrictions. Tourists use their phones differently when travelling internationally – they may want to avoid additional out of country fees and only use their phone through wi-fi service. Tourists may not use the partnership apps they normally do while on extensive holiday. Restricting data privacy laws are also affecting the international landscape affecting data that can be shared which may affect processing that identifies tourists.

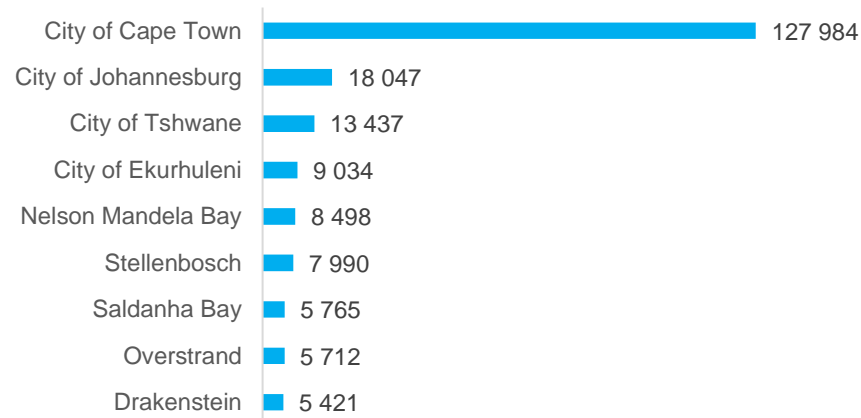
Western Cape Mobile Location Data Insights

- The insights in this report represent mobile location data from a sample of 270,897 domestic and 2,901 international tourists who visited the Western Cape between January and February 2024.
- Within the domestic data set, 127,984 of the sampled tourists were from Cape Town, 18,047 from the City of Johannesburg, and 13,437 from the City of Tshwane.
- The international sampled tourists, 807 were from the United States, 397 were from Australia, and 304 were from Brazil.

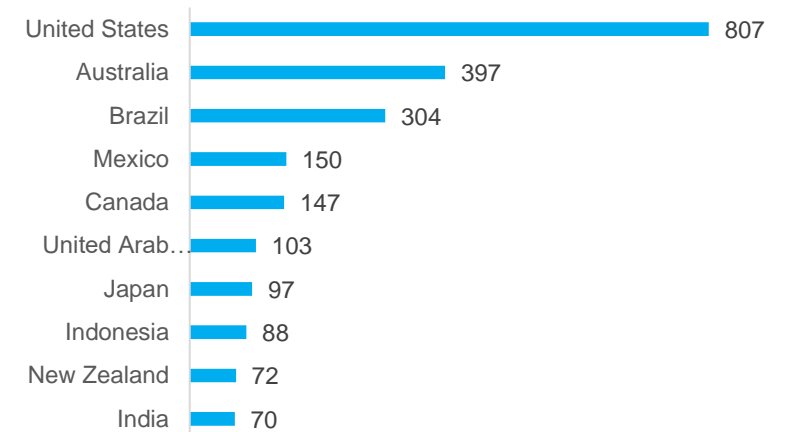
Sample Size, Jan–Feb. 2024



Domestic Origin Municipality, Jan–Feb. 2024



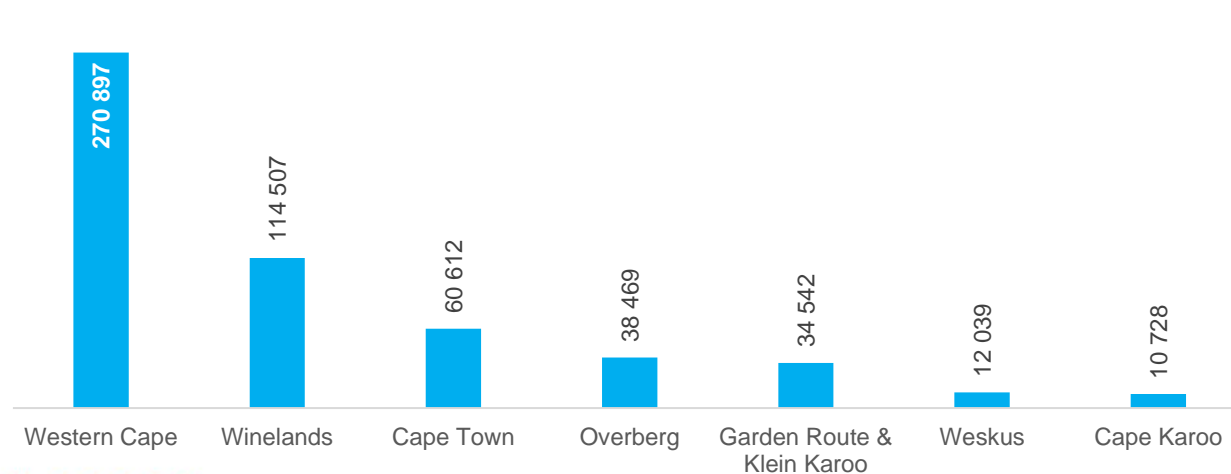
International Origin Country, Jan–Feb. 2024



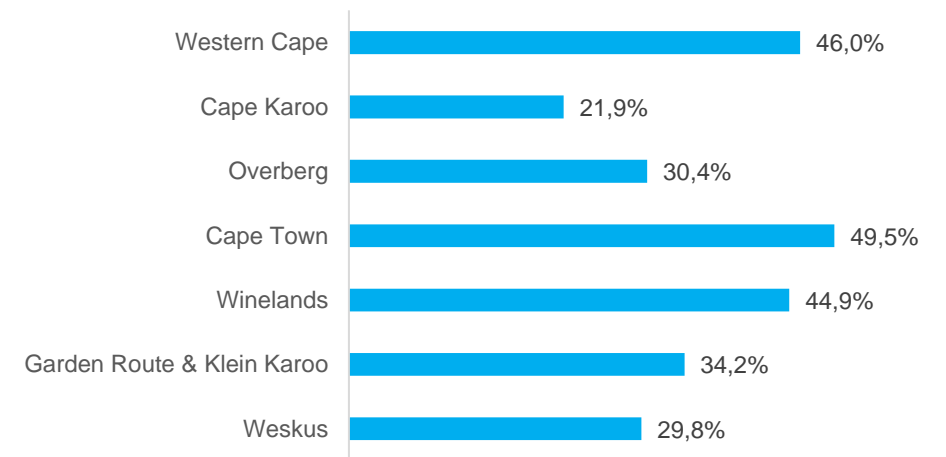
Mobile Insights: Domestic Visitor Trends

- According to the latest available mobile data insights, between January and February 2024, the Western Cape province saw a significant influx of repeat tourists, with 46% of visitors returning for another visit.
- The Winelands, Cape Town, Overberg, and Garden Route & Klein Karoo were the most visited destinations within the province, with 114,507, 60,612, 38,469, and 34,542 domestic tourists respectively between January and February 2024. On the other hand, the Cape Karoo region had the lowest number of tourists, with only 10,728 visitors during the same period.
- Further analysis of the mobile data insights reveals that domestic tourists tended to favor certain regions for repeat visits between January and February 2024. Cape Town emerged as the most popular region for domestic repeat visits, with 49.5% of visitors choosing to return to the region in the past two months.
- Winelands proved to be the second most popular destination for repeat visits, with 44.9% of tourists choosing to return. The Garden Route & Klein Karoo (34.2%) and Overberg (30.4%) regions also proved to be popular among domestic tourists for repeat visits.

Domestic Sample Size, Jan–Feb. 2024



Domestic Repeat Visitors, Jan–Feb. 2024

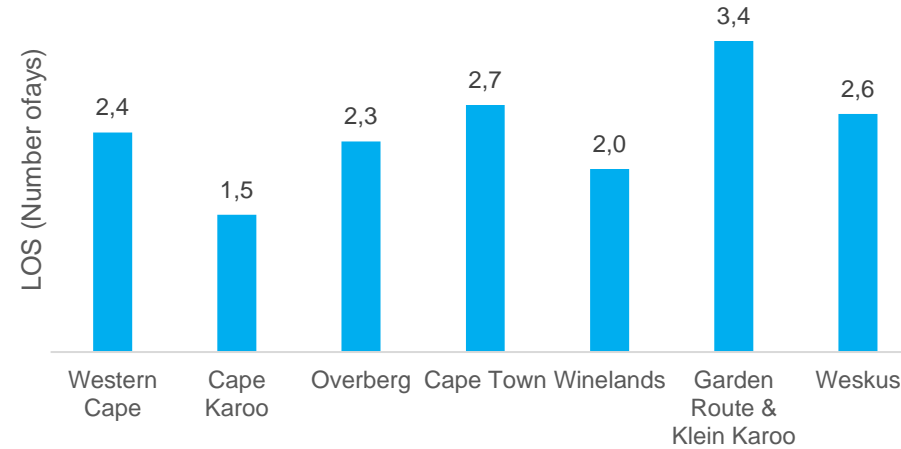


Source: Rove, 2024

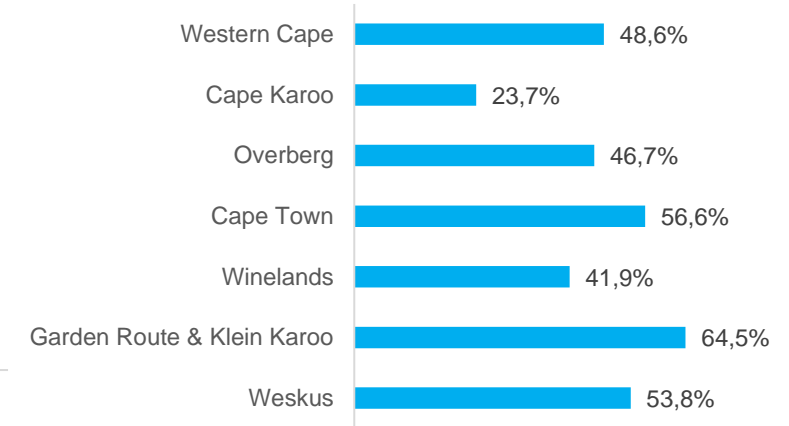
Mobile Insights: Domestic Visitor Trends

- According to the latest mobile data insights, it has been observed that domestic tourists who visit the Western Cape tend to spend the longest time in some of the most popular tourist destinations. The top five destinations where the average tourist stay duration is maximum are the Garden Route & Klein Karoo (3.4 days), Cape Town (2.7 days), Weskus (2.6 days), Overberg (2.3 days), and Winelands (2.0 days).
- Interestingly, the mobile data insights also reveal that 64.5% of sampled tourists prefer to stay overnight in the Garden Route & Klein Karoo, while 50% choose Cape Town and Weskus as their preferred destinations for overnight stay.
- On the other hand, the mobile data insights also show that only 72.8% of domestic tourists tend to visit Cape Karoo for just one day between January and February 2024.

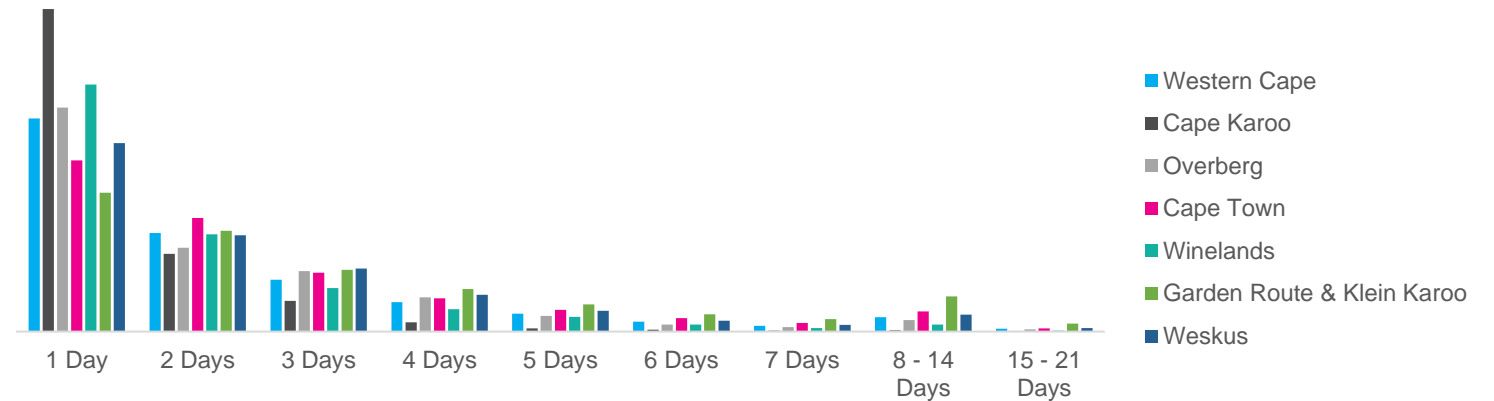
Average Length of Stay (LOS), Jan–Feb. 2024



% Overnight Stays, Jan-Feb. 2024



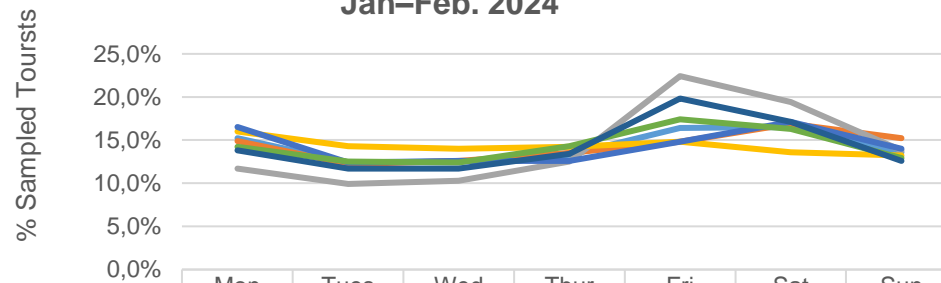
Average Length of Stay (Number of Days): Domestic, Jan–Feb. 2024



Mobile Insights: Domestic Visitor Trends

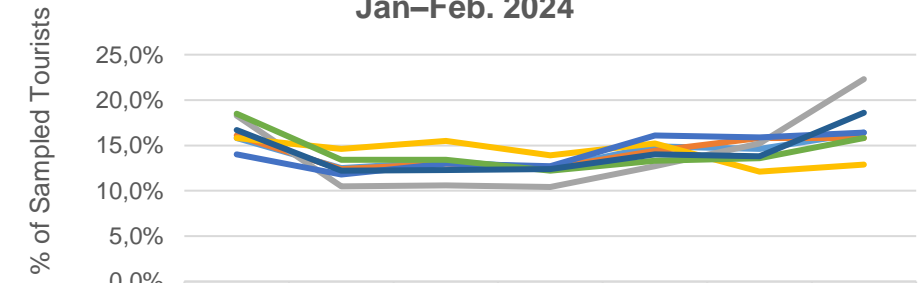
- Based on the insights gathered from mobile data between January and February 2024, it has been observed that the Western Cape province is a popular destination for domestic tourists. Upon analysing the data, it was found that tourists arriving in the province usually do so on either a Monday, Friday or Saturday, with most of them departing on a Sunday or Monday.
- Interestingly, the findings revealed different trends in terms of the day of arrival and departure among visitors to various parts of the province. For instance, tourists heading to the Cape Karoo region mostly arrived on a Saturday and left on a Monday. In the Overberg region, tourists mostly arrived on a Friday and departed on a Sunday.
- Tourists visiting Cape Town, on the other hand, arrived and departed from the city on Monday. Conversely, tourists to the Winelands arrived on a Monday and departed on either Friday or Sunday. Tourists to the Garden Route and Klein Karoo regions mostly arrived on a Friday and departed on a Monday. Lastly, tourists to Weskus mostly arrived on a Friday and departed on a Sunday.

Popular Arrival Days of the Week: Domestic, Jan–Feb. 2024



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

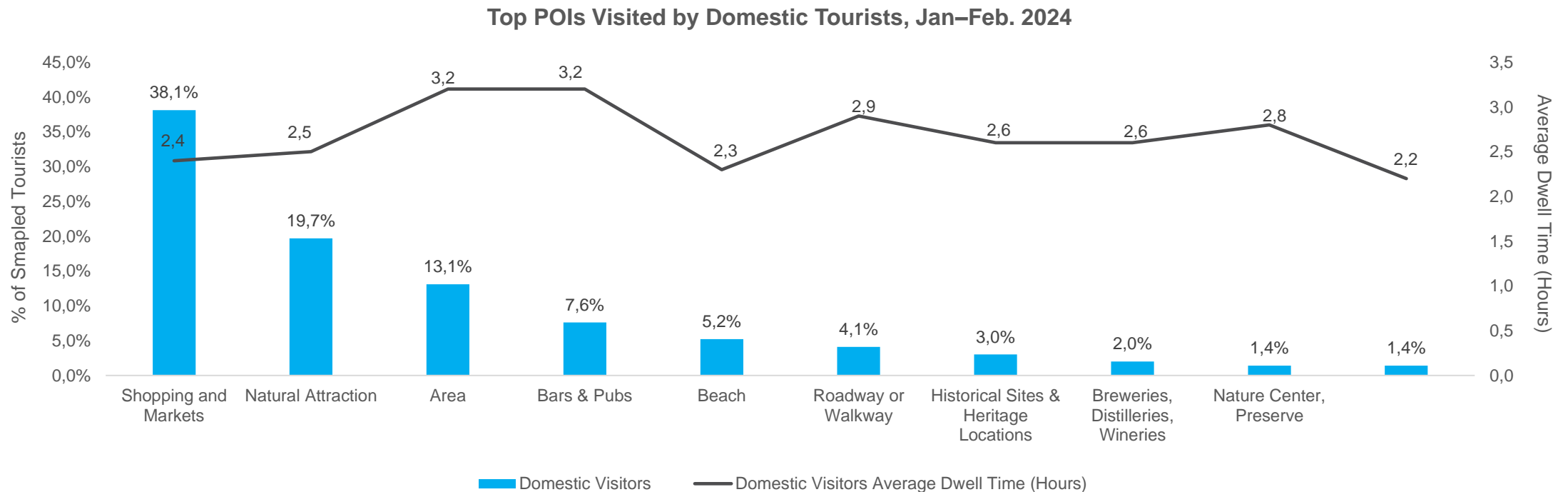
Popular Departure Days of the Week: Domestic, Jan–Feb. 2024



| | Mon | Tues | Wed | Thur | Fri | Sat | Sun |
|----------------------------|-------|-------|-------|-------|-------|-------|-------|
| Western Cape | 15,8% | 12,5% | 13,2% | 12,5% | 14,9% | 14,6% | 16,4% |
| Cape Karoo | 16,1% | 12,4% | 13,0% | 12,5% | 14,4% | 15,8% | 15,8% |
| Overberg | 18,3% | 10,5% | 10,6% | 10,4% | 12,7% | 15,2% | 22,3% |
| Cape Town | 15,8% | 14,6% | 15,5% | 13,9% | 15,2% | 12,1% | 12,9% |
| Winelands | 14,0% | 11,8% | 13,0% | 12,7% | 16,1% | 15,9% | 16,4% |
| Garden Route & Klein Karoo | 18,5% | 13,4% | 13,4% | 12,2% | 13,3% | 13,6% | 15,8% |
| Weskus | 16,7% | 12,2% | 12,3% | 12,4% | 14,0% | 13,8% | 18,6% |

Points of Interest (POIs) Visited: Domestic Tourists

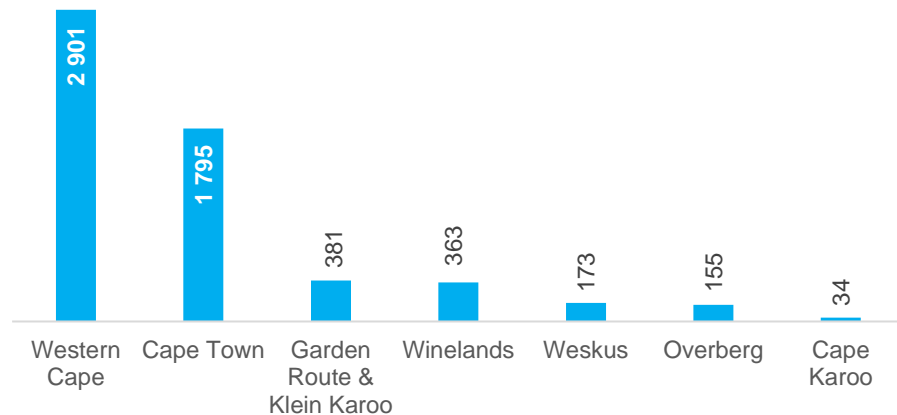
- **Shopping and markets** were the most popular type of attraction visited by domestic tourists with an average dwell time of **2.4 hours**.
- **Natural attractions** ranked as the 2nd most popular point of interest among domestic tourists with an average dwell time of **2.5 hours**.
- **Spending time in areas** like Cederberg Wilderness, Stanford Valley, Hemel-en-Aarde Valley and Van Dyk's Bay ranked 3rd amongst the top POIs visited by domestic tourists, with an average dwell time of **3.2 hours**.
- **Bars and pubs** were the 4th most popular point of interest and domestic tourists spent an average of **3.2 hours** at the location.
- **Spending time at the beach** ranked the 5th most popular point of interest among domestic tourists, with an average dwell time of **2.3 hours**.



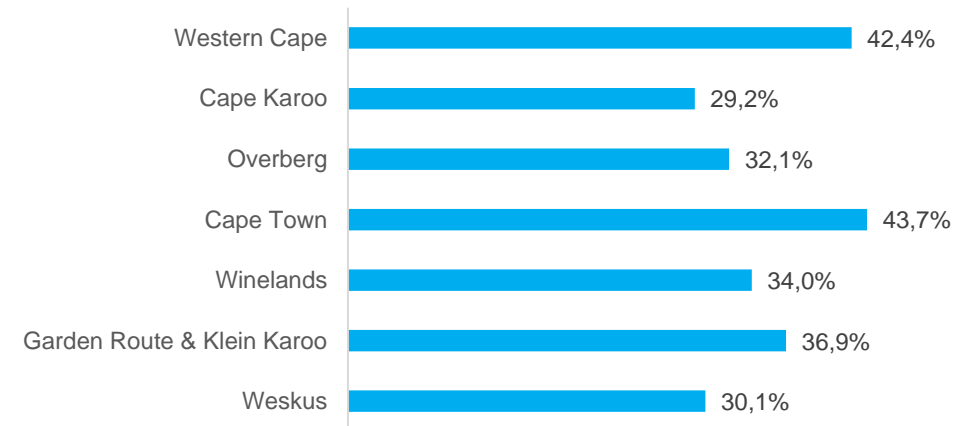
Mobile Insights: International Visitor Trends

- According to the latest available mobile data insights, between January and February 2024, the Western Cape province received 2,901 international visitors and 42.4% of visitors returned for another visit.
- Cape Town, Garden Route & Klein Karoo and Winelands were the most visited destinations within the province, with 1,795, 381 and 363 international tourists respectively between January and February 2024. On the other hand, the Cape Karoo region had the lowest number of tourists, with only 34 visitors during the same period.
- Cape Town was the most popular destination for international repeat visitors. Approximately 43.7% of the repeat visitors chose to return to the city. Other regions that were popular among tourists included Garden Route & Klein Karoo, Winelands, Overberg, Weskus, and Cape Karoo, with 36.9%, 34.0%, 30.1%, and 29.2% of tourists revisiting these regions respectively between January and February 2024.

International Sample Size, Jan–Feb. 2024



International Tourists Repeat Visits, Jan–Feb. 2024

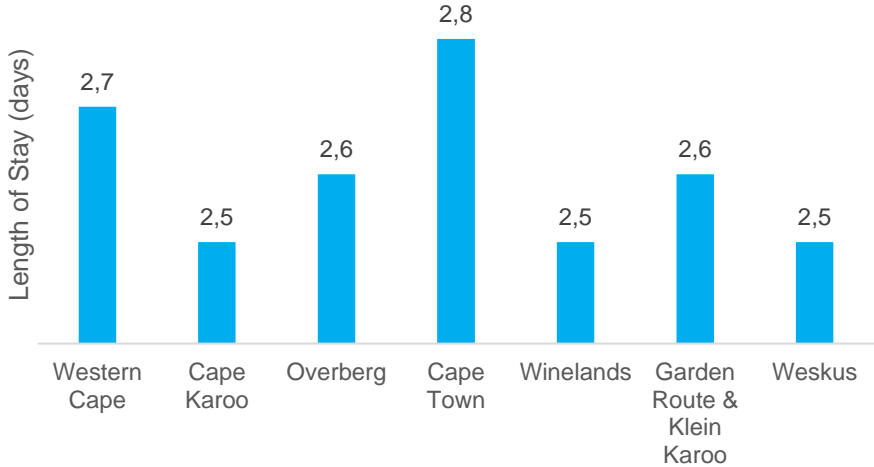


Source: Rove, 2024

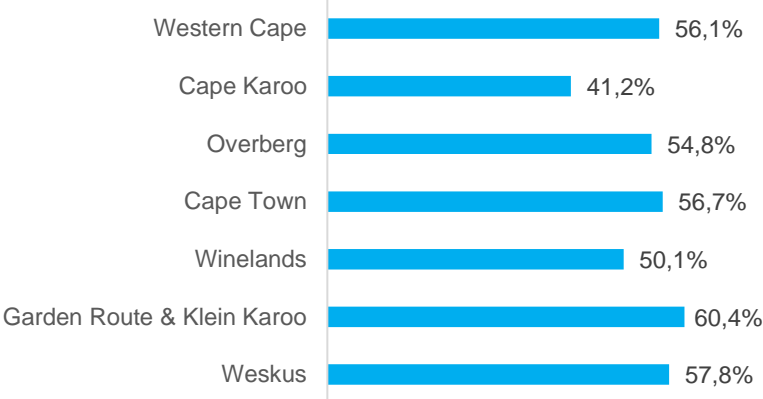
Mobile Insights: International Visitor Trends

- According to the mobile data insights, all the Western Cape regions were popular destinations amongst international tourists with an average length of 2.8 days in Cape Town, 2.6 days at the Garden Route & Klein Karoo and Overberg, and 2.5 days in Cape Karoo and Weskus.
- The Garden Route & Klein Karoo region was the preferred choice for overnight stays among tourists, with 60.4% of them choosing to stay there. The Weskus region was the second most popular choice for tourists, with 57.8% of them staying overnight. Over half of the tourists opted to stay in Overberg, Winelands, and Cape Town.
- The majority of tourists, who visited the province and its regions, stayed for 1-2 days. This information can help tourism officials understand how long international tourists tend to stay in the Western Cape and which regions they prefer to visit.
- It's worth noting that the overnight stay is defined as tourists who arrive before midnight and stay until 07:00 the following day.

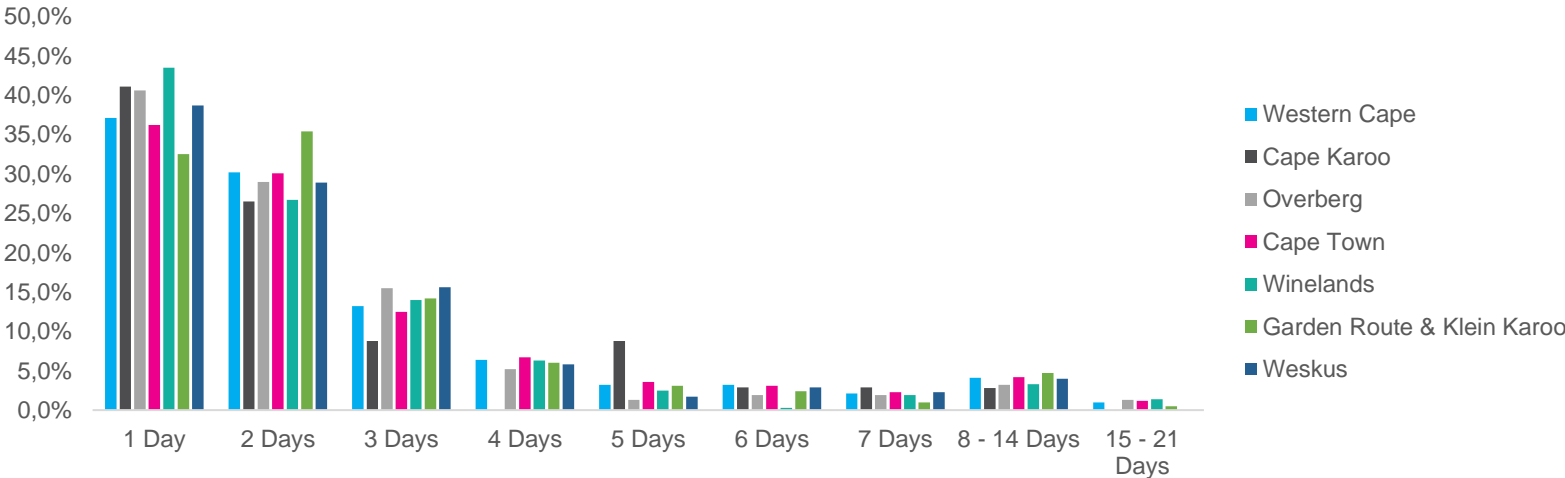
Average Length of Stay (LOS), Jan–Feb. 2024



% Overnight Stays, Jan–Feb. 2024



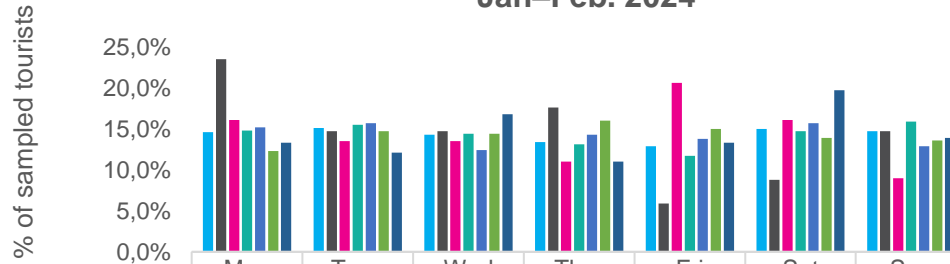
Average Length of Stay (Number of Days): International, Jan–Feb. 2024



Mobile Insights: International Visitor Trends

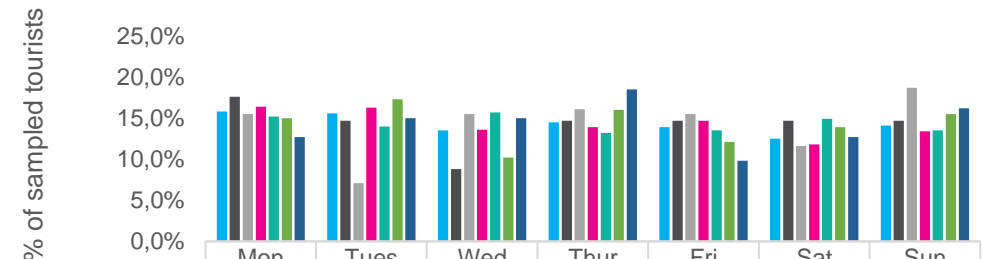
- As per the recent findings on international visitor trends to the Western Cape between January and February 2024, it has been observed that tourists mostly arrived either on a Tuesday or Saturday and left either Monday or Tuesday.
- During this period, a group of 34 tourists visited the Cape Karoo region on a Monday and departed from the region on a Monday. Further, the findings indicated that the most popular arrival days for tourists in Cape Town were Tuesday and Sunday, while Monday and Tuesday were the preferred departure days.
- As for tourists who visited the Winelands region, it was observed that they mostly arrived on Monday, Tuesday, or Saturday and departed from the region between Monday or Wednesday. Moving on to the Garden Route & Klein Karoo region, it was found that visitors arrived on Friday and left on Tuesday. In the Weskus region, Saturday emerged as the most popular arrival day and Sunday as the day of departure. Finally, for tourists to the Overberg region, Friday was the most popular arrival day, and Sunday was the day of departure.

Popular Arrival Days of the Week: International, Jan–Feb. 2024



| | Mon | Tues | Wed | Thur | Fri | Sat | Sun |
|------------------------------|-------|-------|-------|-------|-------|-------|-------|
| ■ Western Cape | 14,6% | 15,1% | 14,3% | 13,4% | 12,9% | 15,0% | 14,7% |
| ■ Cape Karoo | 23,5% | 14,7% | 14,7% | 17,6% | 5,9% | 8,8% | 14,7% |
| ■ Overberg | 16,1% | 13,5% | 13,5% | 11,0% | 20,6% | 16,1% | 9,0% |
| ■ Cape Town | 14,8% | 15,5% | 14,4% | 13,1% | 11,7% | 14,7% | 15,9% |
| ■ Winelands | 15,2% | 15,7% | 12,4% | 14,3% | 13,8% | 15,7% | 12,9% |
| ■ Garden Route & Klein Karoo | 12,3% | 14,7% | 14,4% | 16,0% | 15,0% | 13,9% | 13,6% |
| ■ Weskus | 13,3% | 12,1% | 16,8% | 11,0% | 13,3% | 19,7% | 13,9% |

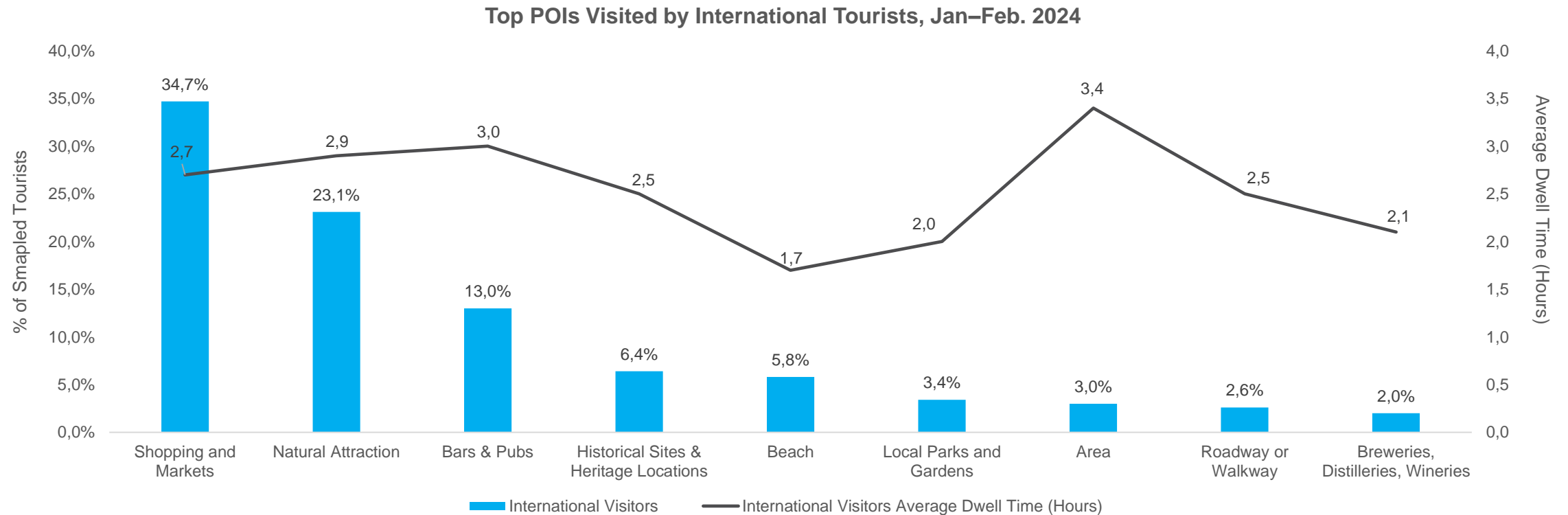
Popular Departure Days of the Week: International, Jan–Feb. 2024



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

Points of Interest (POIs) Visited: International Tourists

- **Shopping and markets** were the most popular type of attraction visited by international tourists with an average dwell time of **2.7 hours**.
- **Natural attractions** ranked as the 2nd most popular point of interest among international tourists, with an average dwell time of **2.9 hours**.
- **Bars and pubs** were the 3rd most popular point of interest for international tourists spent an average of **3.0 hours** at the location.
- **Historical sites and heritage locations** ranked the 4th most popular point of interest among international tourists, with an average dwell time of **2.5 hours**.
- **Spending time at the beach** ranked 5th amongst the top POIs visited by international tourists, with an average dwell time of **1.7 hours**.



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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <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.). | | |
| 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 the 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 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. |



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