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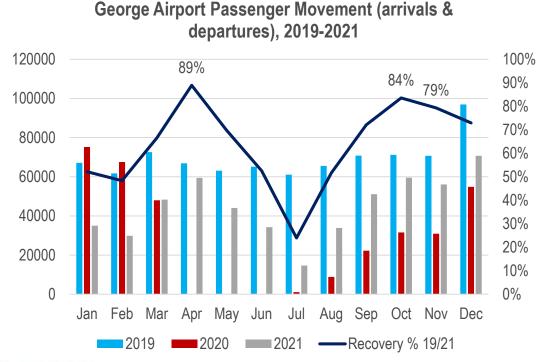
1. Executive Summary

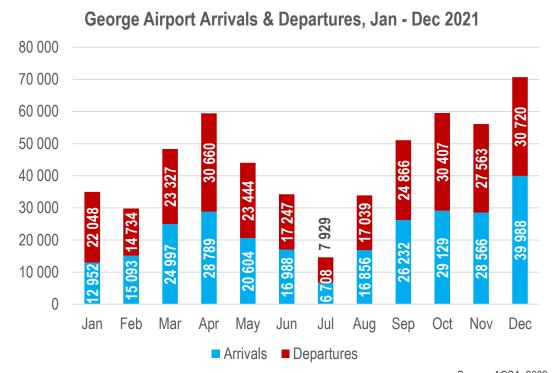
- Stretching from Witsand to Plettenberg Bay, Oudtshoorn, Calitzdorp and Ladismith on the world renowned Route 62, the Garden Route and Klein Karoo (GR & KK) is a place of immense natural beauty; offering an abundance of adventure, world class golf courses and award winning dining experiences. This report provides an overview of the tourism activity in the Garden Route and Klein Karoo based on airport passenger movement, visits to selected local attractions, tourism sentiment from online conversations and mobile-location data insights in selected towns. The research is not intended to represent tourism for the region as it only represents a selected sample size of visitors.
- In 2021, passengers through George Airport grew by 58% from 2020 and reached a 64% recovery rate when compared to 2019. Visitors to 4 participating attractions in the Garden Route & Klein Karoo grew by 10% when compared to last year and recovered to 42% of what it was in 2019. Overseas visitor numbers to the Cango Caves were significantly lower than pre-covid years but started picking up towards the end of 2021.
- Based on mobile location data insights from 89 307 domestic and 767 international tourists, the Garden Route & Klein Karoo was a popular overnight destination for both domestic and international tourists. Both international and domestic tourists stayed for an average 3,3 days in the region. Overnight stays in the Garden Route & Klein Karoo were higher than the general average for the province in both the domestic and international categories.
- Tourism Sentiment in Knysna was largely driven by positive conversations around beaches, and festivals, events and concerts. The biggest volume of online conversations about Knysna was around outdoor activities. Highest sentiment was driven by Relaxation and Wellness, which includes conversations about beaches, spa and wellness, and shopping. Ammenities and Entertainment, and Destination Services, also showed high sentiment. Festivals, Events and Concerts, Surfing, and Biking and Cycling, though small in volume, had particularly high sentiment. Safety drove the lowest sentiment but still maintained an overall emotional tone of "joy". The **Tourism Sentiment Score®** provides a comprehensive look at how destinations are driving positive perceptions about their tourism offerings through online content. Between January and December 2021, Knysna's Tourism Sentiment score is considered average at 30.



2. George Airport Passenger Movement

- George Airport reached its highest share of domestic arrivals at 39 988 passengers in December 2021, and a 76% recovery rate from its 2019 figure.
- There was a total of 266 902 domestic arrivals and 269 984 departures at George Airport in 2021, collectively representing a recovery of 64% of what it was in 2019.
- In terms of recovery to 2019 levels, April (89%) was the best month, followed by October (84%) and November (79%).





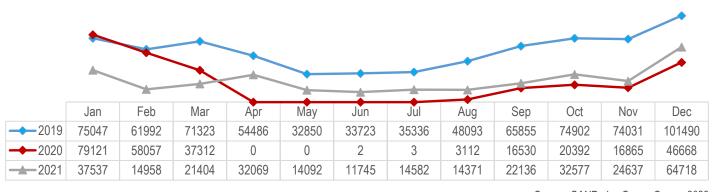


Source: ACSA, 2022

3. Garden Route & Klein Karoo Attractions

- The 4 participating Garden Route & Klein Karoo attractions received a total of 304 826 visitors over the period January to December 2021. Visitor numbers show an overall increase of 10% over the same period in 2020 and recovered to 42% of what it was in 2019.
- During the first half of 2021, January saw the highest recorded number of visitors (37 537 visitors) to the region followed by April with 32 069 visitors and after a mid-year dip in tourist activity, visitor numbers rose to 64 718 in December.

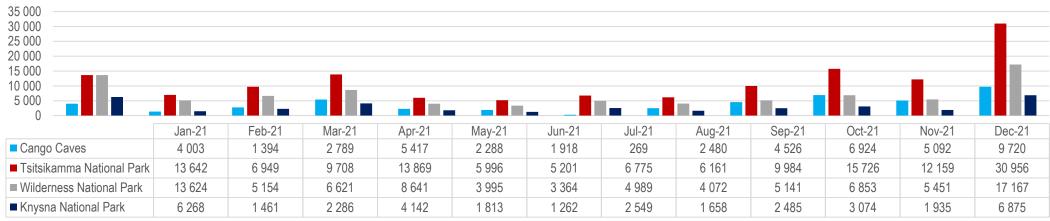
TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, 2019 - 2021



Source: SANParks, Cango Caves, 2022

TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN - DEC 2021





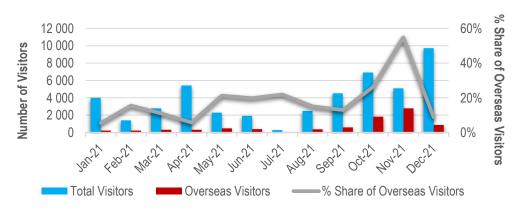


Source: SANParks, Cango Caves, 2022

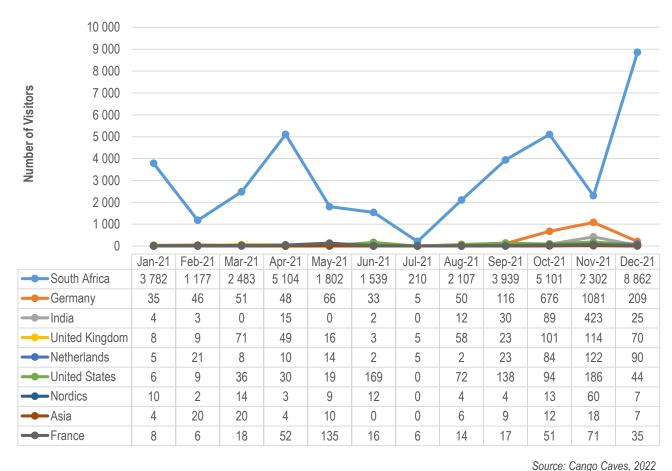
3. Garden Route & Klein Karoo Attractions

- The Cango Caves welcomed a total of 46 820 visitors over the period January to December 2021. The highest recorded number of visitors occurred in December with 9 720 patrons visiting the attraction.
- Germany, United States and India were the top three international source markets in 2021. Overseas visitor numbers were significantly lower than previous years due to COVID related travel restrictions but did however start picking up in the later part of the year.
- South African visitor numbers were highest in April and December, which coincides with the Easter and Festive season breaks.

TOTAL NUMBER OF VISITORS TO THE CANGO CAVES: 2021



CANGO CAVES VISITOR DISTRIBUTION BY TOP SOURCE MARKETS: 2021



Source: Cango Caves, 2022

Caves, 2022

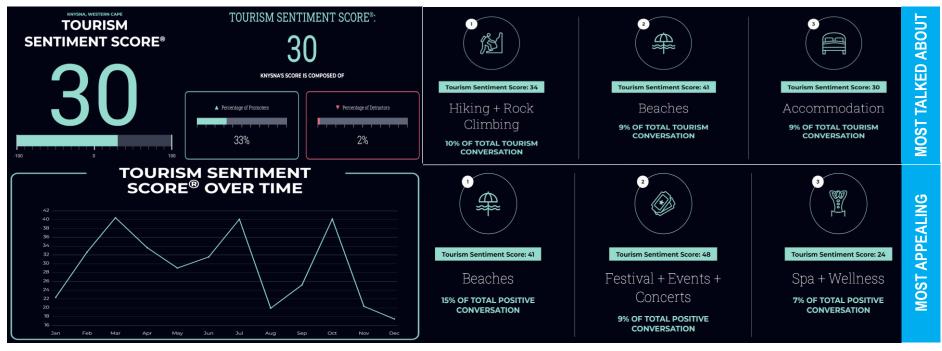


Tourism Sentiment Analysis for Knysna



4. Tourism Sentiment for Knysna

- TOURISM SENTIMENT SCORE® is a consolidated measure of a destination's ability to generate positive word of mouth about its tourism offering. It focuses solely on online conversations that reference or affect a potential traveller's perceptions of a destination's tourism offering.
- Knysna's Tourism Sentiment score is considered average at 30. A third of online conversations were actively recommending or speaking positively about the destination and 2% were actively discouraging or speaking negatively. The rest (65%) spoke about the destination from an indifferent point of view.
- Over the period January to December 2021, hiking and rock climbing, beaches, and accommodation were the most talked about. Beaches, festivals, events and concerts as well as spa and wellness drove the most positive online conversations.

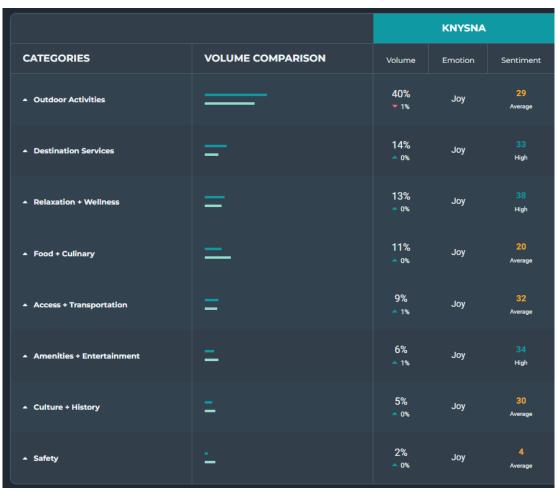




Source: TSI, 2022

4. Tourism Sentiment for Knysna

- Tourism Sentiment in Knysna is based on **1 572 conversations** analyzed between 1 January and 31 December 2021.
- The biggest volume of conversations was around outdoor activities.
 Two fifths of online conversations about Knysna were centered around this topic.
- Within this category, hiking and rock climbing, wildlife viewing and nature
 photography were the most talked about. In addition, Surfing (45) and
 Biking and Cycling (44) had particularly high sentiment
- Highest sentiment overall, was driven by Relaxation and Wellness (38), which includes conversations about beaches, spa and wellness, and shopping.
- High sentiment was also found in Amenities and Entertainment (34) where Festivals, Events and Concerts (48) had particularly high sentiment.
- **Destination Services** (33) and specifically the sub-category **Weddings** (41) also showed high sentiment indicating a high level of positive conversations and an overall feeling of joy about Weddings in this region.
- Safety drove the lowest sentiment but still maintained an overall positive feeling of "joy" when analysing the emotional tone of online conversations.



Source: TSI, 2022



Visitor Trends Mobile Location Data Insights



5. GR & KK 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.

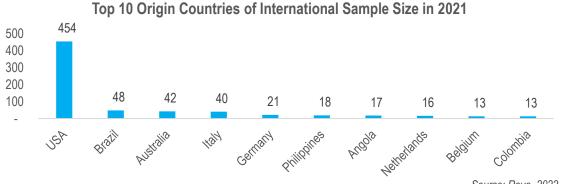
Why use mobile location data insights?

- 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 **89 307 domestic** and **767 international** tourists who visited the Garden Route & Klein Karoo in 2021. 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, 454 were from the USA.





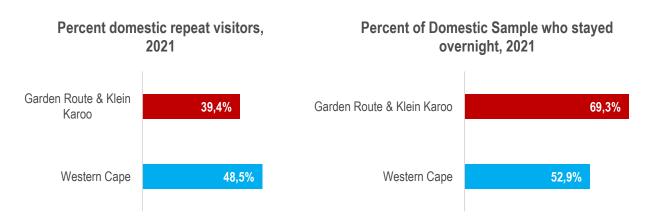






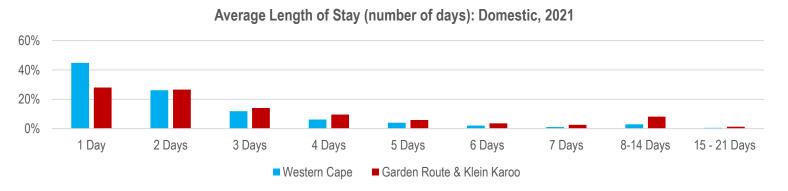
5.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic visitors spent 3,3 days in the Garden Route & Klein Karoo which is longer than the general average for the province (2,4 days).
- More than two thirds of sampled domestic tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (52,9%). An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.
- Close to 40% of domestic tourists to the Garden Route & Klein Karoo were repeat visitors. This is a slightly lower repeater rate than the general average for the province (48,5%). A repeat visitor is defined as one who visited the region more than once within the review period.



Source: Rove, 2022

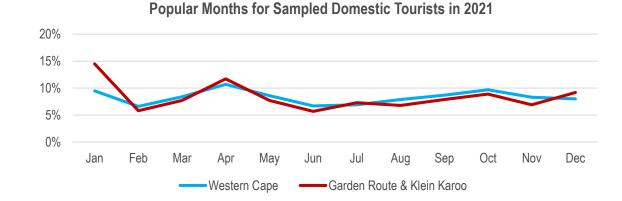
Average Length of Stay (LOS): Domestic, 2021 3,3 2,4 Western Cape Garden Route & Klein Karoo



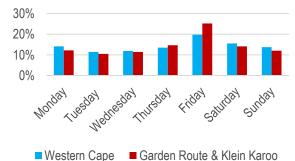


5.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the Garden Route & Klein Karoo were most likely to arrive on a Friday (25%) and depart on a Sunday (21%).
- January was their most popular month to visit the region, followed by April and December.
- April and December were the most popular months for overnight stays among domestic tourists to the Garden Route & Klein Karoo.

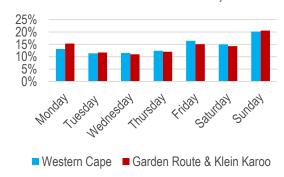




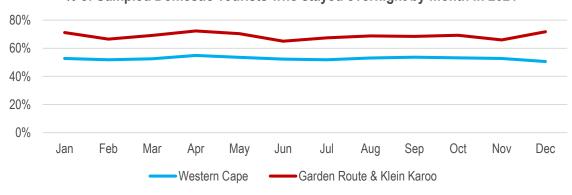


GR & KK - Garden Route and Klein Karoo

Popular Departure Days of the Week to GR & KK: Domestic, 2021



% of Sampled Domestic Tourists who stayed overnight by month in 2021

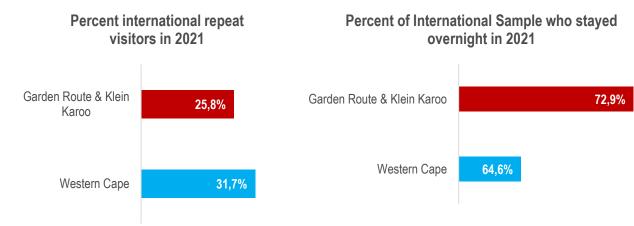


Source: Rove, 2022 Source: Rove, 2022

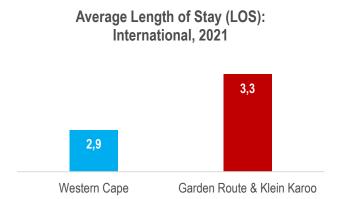


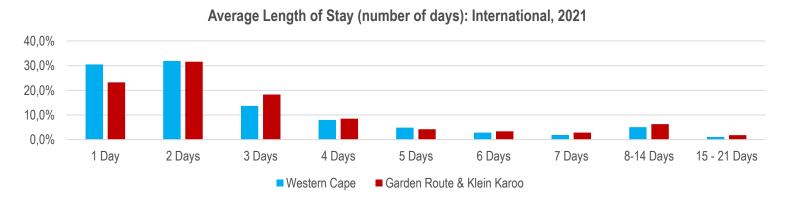
5.2. Mobile Insights: International Visitor Trends

- On average, international visitors spent 3,3 days in the Garden Route & Klein Karoo which is just slightly longer than the general average for the province (2,9 days).
- Nearly three quarters of sampled international tourists stayed overnight in the Garden Route & Klein Karoo, which is also higher than the general average for the province (64,6%). An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.
- Just over a quarter of international tourists to the Garden Route & Klein Karoo were repeat visitors, which is a slightly lower repeater rate than the general average for the province (31,7%). A repeat visitor is defined as one who visited the region more than once within the review period.



Source: Rove, 2022



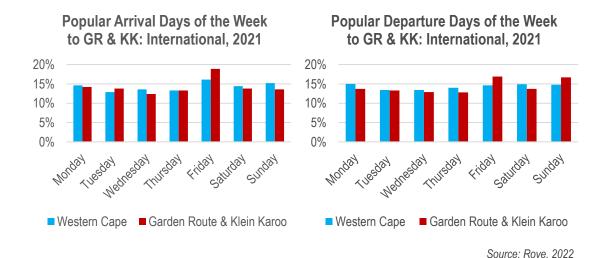


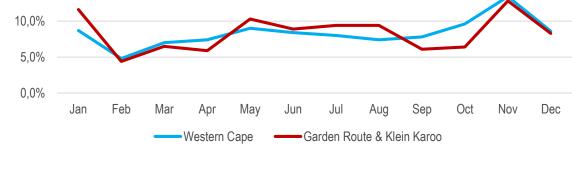


5.2. Mobile Insights: International Visitor Trends

15,0%

- International visitors to the Garden Route & Klein Karoo were most likely to arrive on a Friday (19%) or Monday (14%) and depart on a Friday or Sunday (both 17%).
- November was their most popular month to visit the region in 2021, followed by January and May.
- August and February were the most popular months for overnight stays among international tourists to the Garden Route & Klein Karoo.





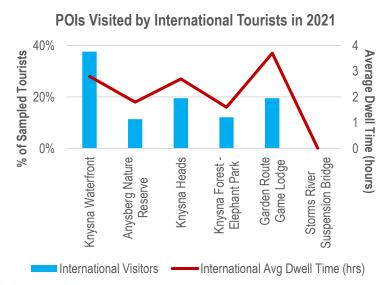
Popular Months for Sampled International Tourists in 2021

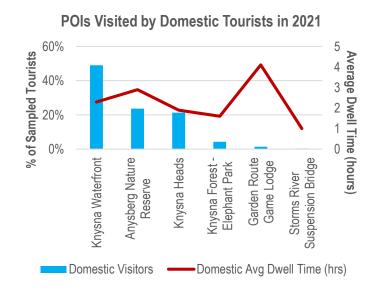


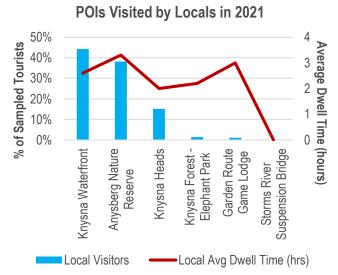


5.3. Points of Interest (POIs) Visited

- Knysna Waterfront was a popular attraction visited for international, domestic and local tourists.
- International visitors spent on average 2,8 hours at Knysna Waterfront while domestic and local visitors spent 2,3 hours and 2,6 hours at the attraction, respectively.
- Garden Route Game Lodge was the second most visited POI for international visitors and saw the longest average dwell time across all tourist segments. International tourists spent on average 3,7 hours, while domestic and local tourists spent 4,1 hours and 3 hours, respectively.
- Anysberg Nature Reserve was the second most popular POI for locals and domestic tourists while international tourists spent a lot of time at Knysna Heads.
- Knysna Heads ranked third for both local and domestic tourists with an average dwell time of 2 hours and 1,9 hours, respectively.



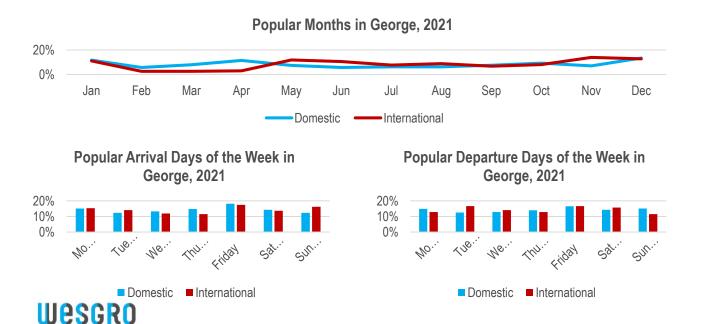


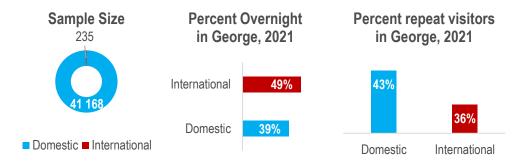




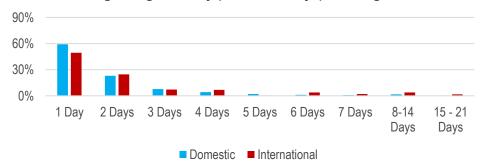
5.4. Mobile Insights: George Visitor Trends

- Nearly half of international tourists and close to two fifths of domestic tourists stayed overnight in George in 2021. Repeat visitors accounted for 43% in domestic and 36% in the international categories.
- For domestic visitors, December was the most popular month to visit, followed by January and April. While, November ranked as the most popular month for international tourists, 14% of international tourists sampled visited in this month. December and May followed with 13% and 12% respectively.
- July and August were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in August and September.
- Fridays and Mondays were the most popular arrival days for domestic visitors and Fridays and Sundays
 were their most popular departure days. For international visitors, Fridays and Sundays were most
 popular arrival days and departure was most popular on Tuesdays and Fridays.

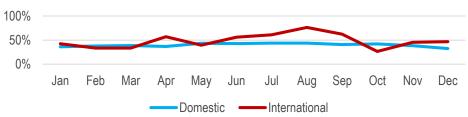




Average Length of Stay (number of days) in George, 2021

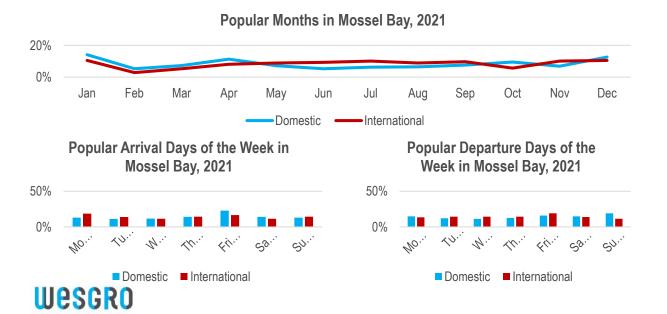


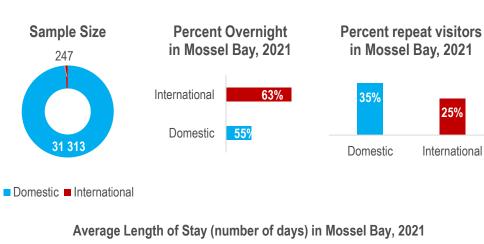
% of Sampled Tourists who stayed overnight in George, 2021

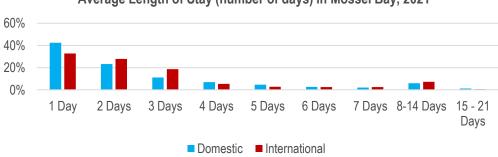


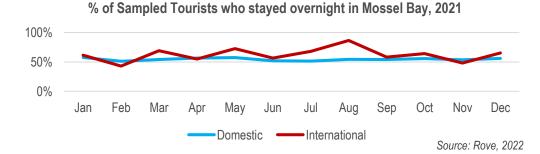
5.5. Mobile Insights: Mossel Bay Visitor Trends

- More than half of domestic tourists and close to two thirds of international tourists stayed overnight in Mossel Bay in 2021. Repeat visitors accounted for 35% in domestic and 25% in the international categories.
- For domestic visitors, January was the most popular month to visit, followed by December and April.
 While, December and January ranked as the most popular months for international tourists, 11% of international tourists sampled visited in both these months respectively.
- January and May were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in August and May.
- Fridays, Thursdays and Saturdays were the most popular arrival days for domestic visitors and Sundays and Fridays were their most popular departure days. For international visitors, Mondays and Fridays were most popular arrival days and departure was most popular on Fridays.



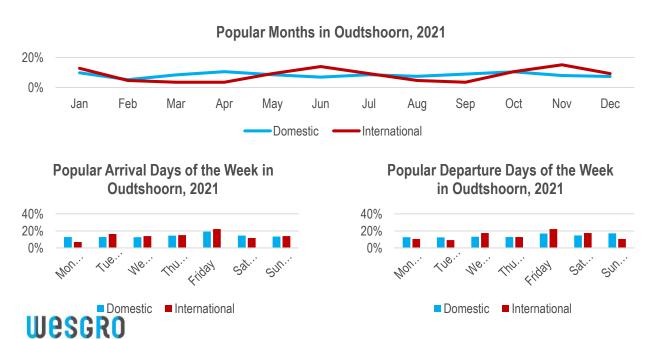


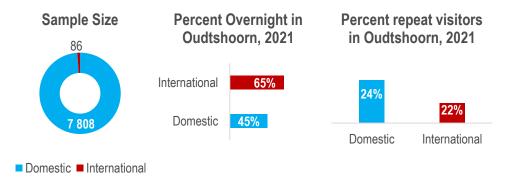




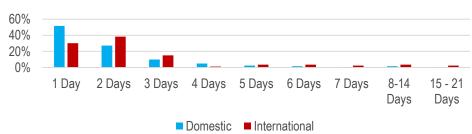
5.6. Mobile Insights: Oudtshoorn Visitor Trends

- Close to half of domestic and just under two thirds of international tourists stayed overnight in Oudtshoorn in 2021. Repeat visitors accounted for 24% in domestic and 22% in the international categories.
- For domestic visitors, April was the most popular month to visit, followed by October and January. While, November ranked as the most popular month for international tourists, 15% of international tourists sampled visited in this month. June and January followed with 14% and 13% respectively.
- September and October were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in November.
- Fridays were the most popular arrival days for domestic visitors and Sundays were their most popular departure days. For international visitors, Fridays and Tuesdays were most popular arrival days and departure was most popular on Fridays.







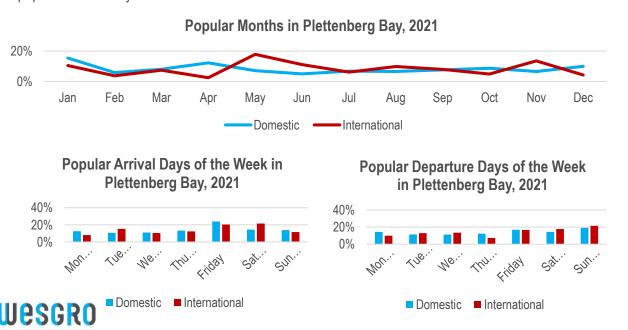


% of Sampled Tourists who stayed overnight in Oudtshoorn, 2021

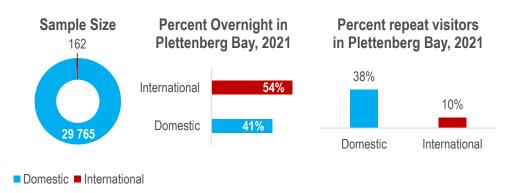


5.7. Mobile Insights: Plettenberg Bay Visitor Trends

- More than half of international tourists and just over two fifths of domestic tourists stayed overnight in Plettenberg Bay in 2021. Repeat visitors accounted for 38% in domestic and 10% in the international categories.
- For domestic visitors, January (15%) was the most popular month to visit, followed by April (12%) and December (10%). While, May ranked as the most popular month for international tourists, 18% of international tourists sampled visited in this month. November and June followed with 14% and 11% respectively.
- January and April were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in February and April.
- Fridays were the most popular arrival days for domestic visitors and Sundays were their most popular departure days. For international visitors, Saturdays were most popular arrival days and departure was most popular on Sundays.



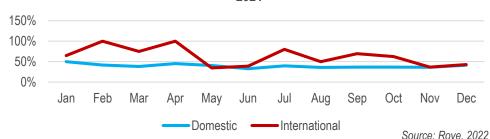
tourism, trade, investment, film







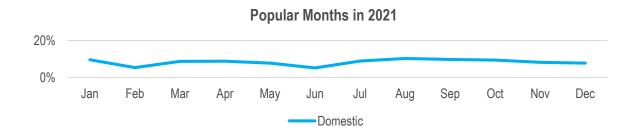
% of Sampled Tourists who stayed overnight in Plettenberg Bay, 2021

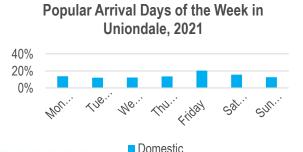


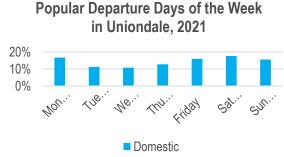
5.8. Mobile Insights: Uniondale Visitor Trends

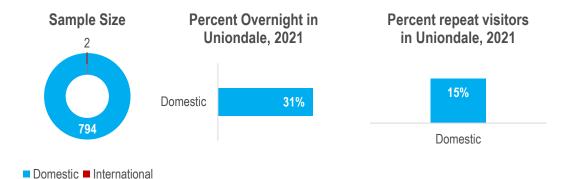
*International sample size not sufficient for a complete statistical representation.

- Close to a third of domestic tourists stayed overnight in Uniondale in 2021 and 15% of domestic visitors travelled to the town more than once within the review period.
- For domestic visitors, August (10,3%) was the most popular month to visit, followed by September (9.8%) and January (9.6%).
- August and June were the most popular months for overnight stays among domestic tourists, with 43% and 39% of sampled tourists staying overnight, respectively.
- Fridays and Saturdays were the most popular arrival days for domestic visitors and Saturdays and Mondays were their most popular departure days.





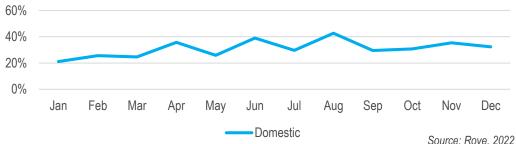






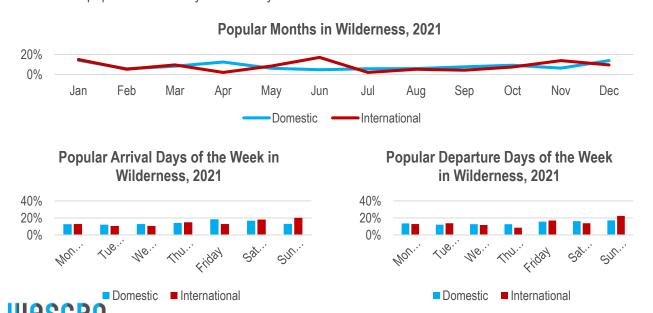


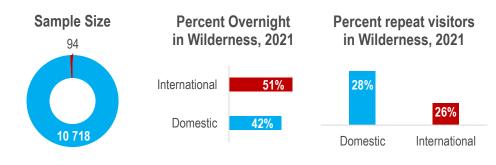




5.9. Mobile Insights: Wilderness Visitor Trends

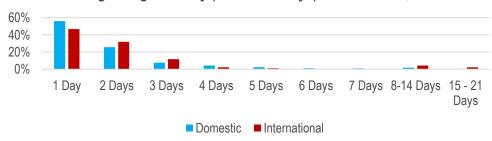
- Half of international tourists and just over two fifths of domestic tourists stayed overnight in Wilderness in 2021. Repeat visitors accounted for 28% in domestic and 26% in the international categories.
- For domestic visitors, January (14,2%) was the most popular month to visit, followed by December (13,9%) and April (12,4%). While, June ranked as the most popular month for international tourists, 17% of international tourists sampled visited in this month. January and November followed with 15% and 14% respectively.
- November and March were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in April and September.
- Friday was the most popular arrival day for domestic visitors and Sunday was their most popular departure day. For international visitors, Sundays and Saturdays were their most popular arrival days and departure was most popular on Sundays and Fridays.



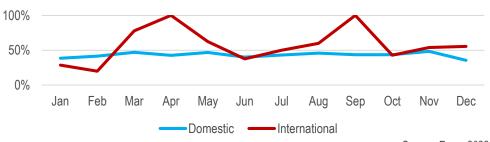


■ Domestic ■ International

Average Length of Stay (number of days) in Wilderness, 2021



% of Sampled Tourists who stayed overnight in 2021



Mobile Tourists and Non-Tourists Definitions

About Mobile Location Data

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

Who Are Tourists vs Non-Tourists?

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



Mobile Tourists and Non-Tourists Definitions

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

Notes and Considerations:

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

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

Notes and Considerations:

- Residents of a city are not counted as a tourist of the city
- Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon
- Minimum duration of visit of 45 minutes excludes commuters driving through each city

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

Notes and Considerations:

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

What are Tourist Segments?

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



Glossary of Key Terms

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



6. List of Sources

- Airports Company of South Africa (ACSA)
- South African National Parks (SANParks)
- Cango Caves
- Tourism Sentiment Index (TSI)
- Rove Marketing powered by Near



