



Garden Route & Klein Karoo

Tourism Trends

January - June 2022

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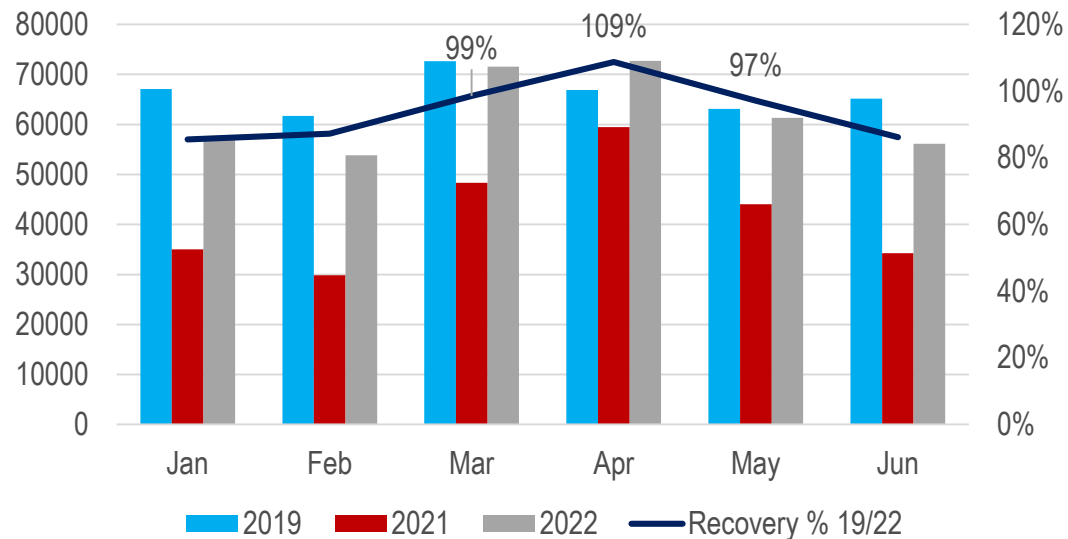
1. Executive Summary

- 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, visitor trends from regional tracking surveys 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 the first half of 2022, passengers through George Airport grew by 49% from the same period in 2021 and reached a 94% recovery rate when compared to 2019. Visitors to 4 participating attractions in the Garden Route & Klein Karoo grew by 49% when compared to last year and recovered 59% of what it was in 2019. Overseas visitor numbers to the Cango Caves were significantly lower than pre-covid years but continues to strengthen monthly since the start of 2022.
- April was the best month for tourism in the Garden Route & Klein Karoo region, as it was for the rest of the province. Passenger arrivals through George Airport exceeded pre-covid levels, going from 32 939 arrivals in April 2019 to 35 606 in the same month this year, a recovery rate of 109%.
- Based on mobile location data insights from 36 106 domestic and 602 international tourists, the Garden Route & Klein Karoo was a popular overnight destination for both domestic and international tourists who stayed for an average 3,9 days and 3,4 days, respectively. Overnight stays in the Garden Route & Klein Karoo were higher than the general average for the province in both the domestic and international categories.
- Visitor surveys conducted via local tourism offices in George and Wilderness confirm that the largest proportion of travellers to the region originated from the domestic market (79,3%), in particular from within the Western Cape (50,7%). The overseas market accounted for 20,7% of visitors over the period, led by USA, France, Germany and United Kingdom.
- Three quarters of visitors travelled to the region for holiday and visiting beaches ranked as the top tourism activity. A third of survey respondents said that they spent between R1001 and R2000 on average, per day, and two fifths travelled in pairs.

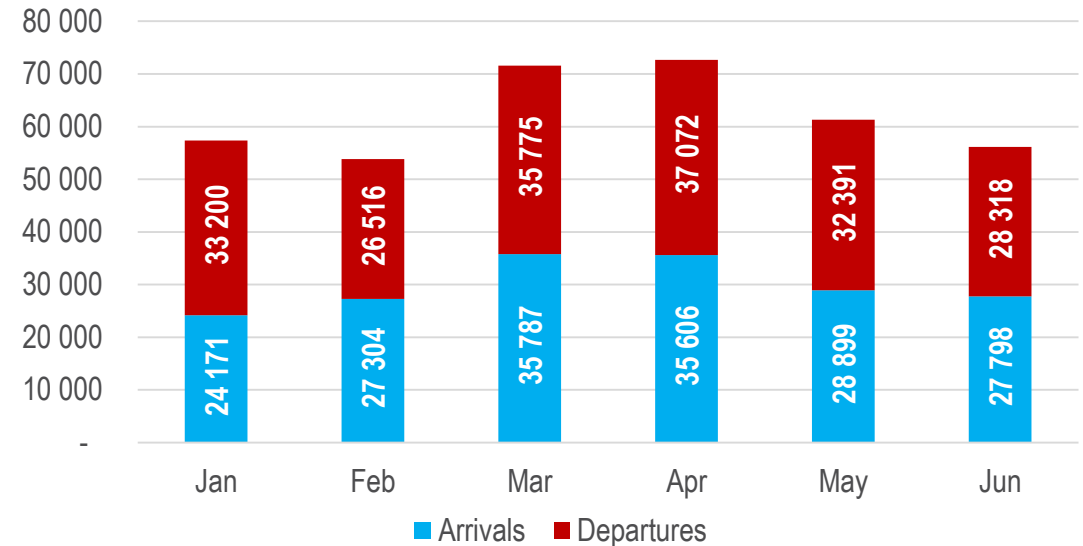
2. George Airport Passenger Movement

- George Airport reached its highest share of domestic arrivals at 35 787 passengers in March 2022, having fully recovered to its March 2019 figure (35409 passengers). April followed with 35 606 passenger arrivals, recovering to 108% of its 2019 figure (32 939 passengers).
- There was a total of 179 565 domestic arrivals and 193 272 departures at George Airport in the first half of 2022, collectively representing a recovery of 94% of what it was in 2019.
- In terms of two-way passenger recovery to 2019 levels, April (109%) was the best month, followed by March (99%) and May (97%).

George Airport Two-way Passenger Movement (arrivals & departures), 2019-2022

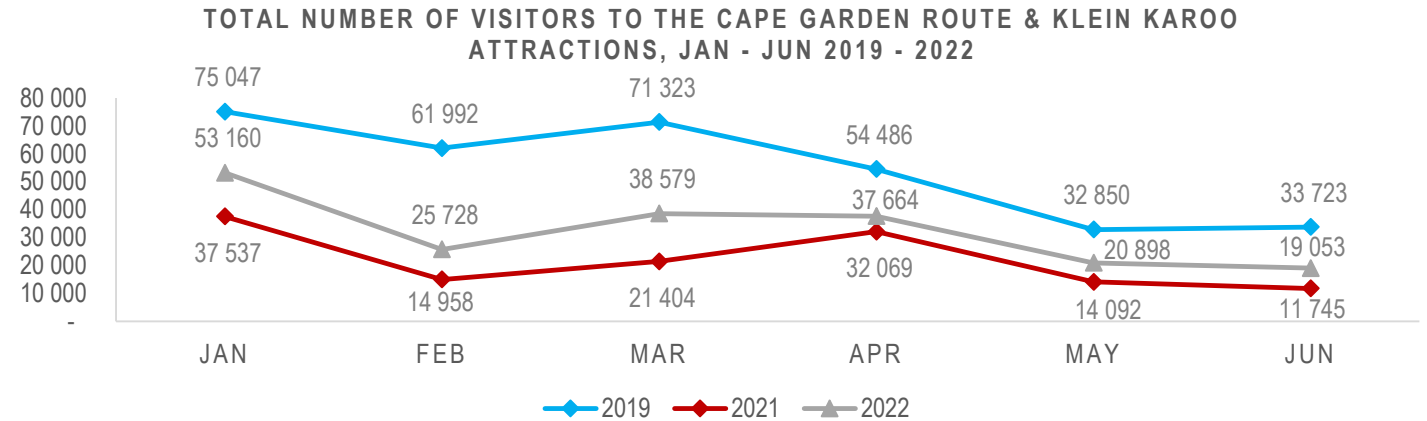


George Airport Arrivals & Departures, Jan - Jun 2022



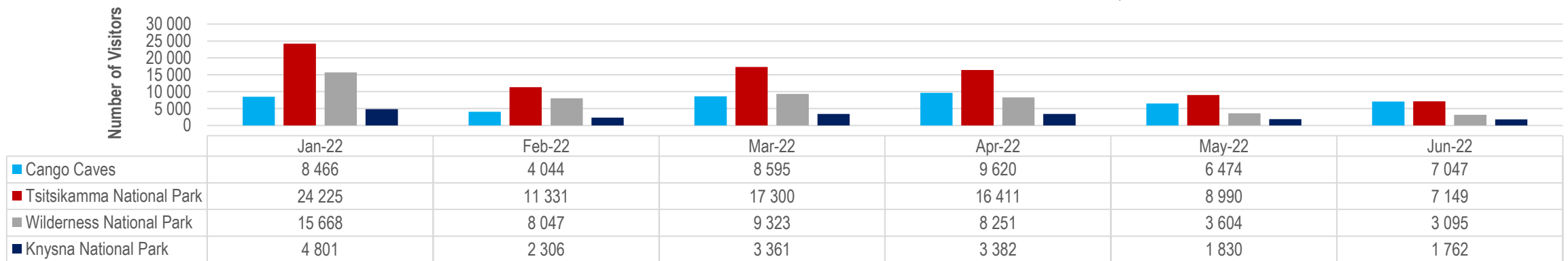
3. Garden Route & Klein Karoo Attractions

- The 4 participating Garden Route & Klein Karoo attractions received a total of 195 082 visitors over the period January to June 2022. Visitor numbers show an overall increase of 48% over the same period in 2021 and recovered to 59% of what it was in 2019.
- During the first half of 2022, January saw the highest recorded number of visitors (53 160 visitors) to the region followed by March (38 579 visitors) and April (37 664 visitors).



Source: SANParks, Cango Caves, 2022

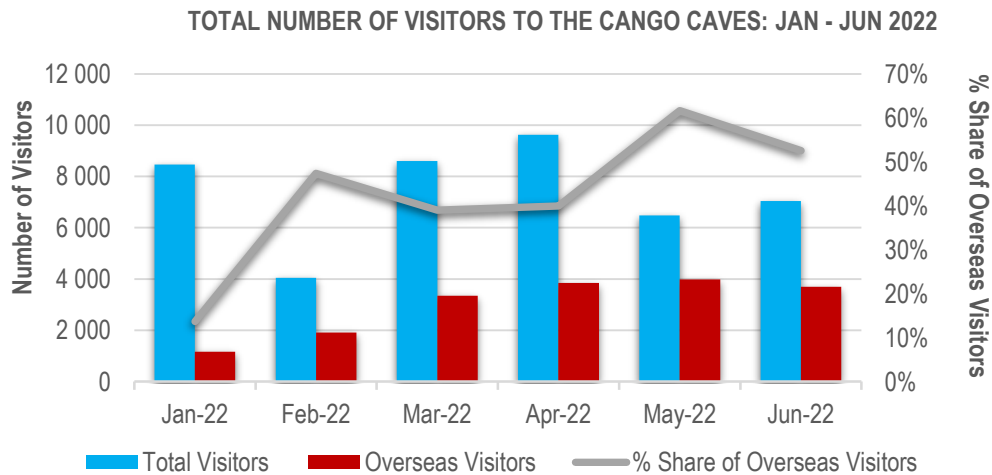
TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN - JUN 2022



Source: SANParks, Cango Caves, 2022

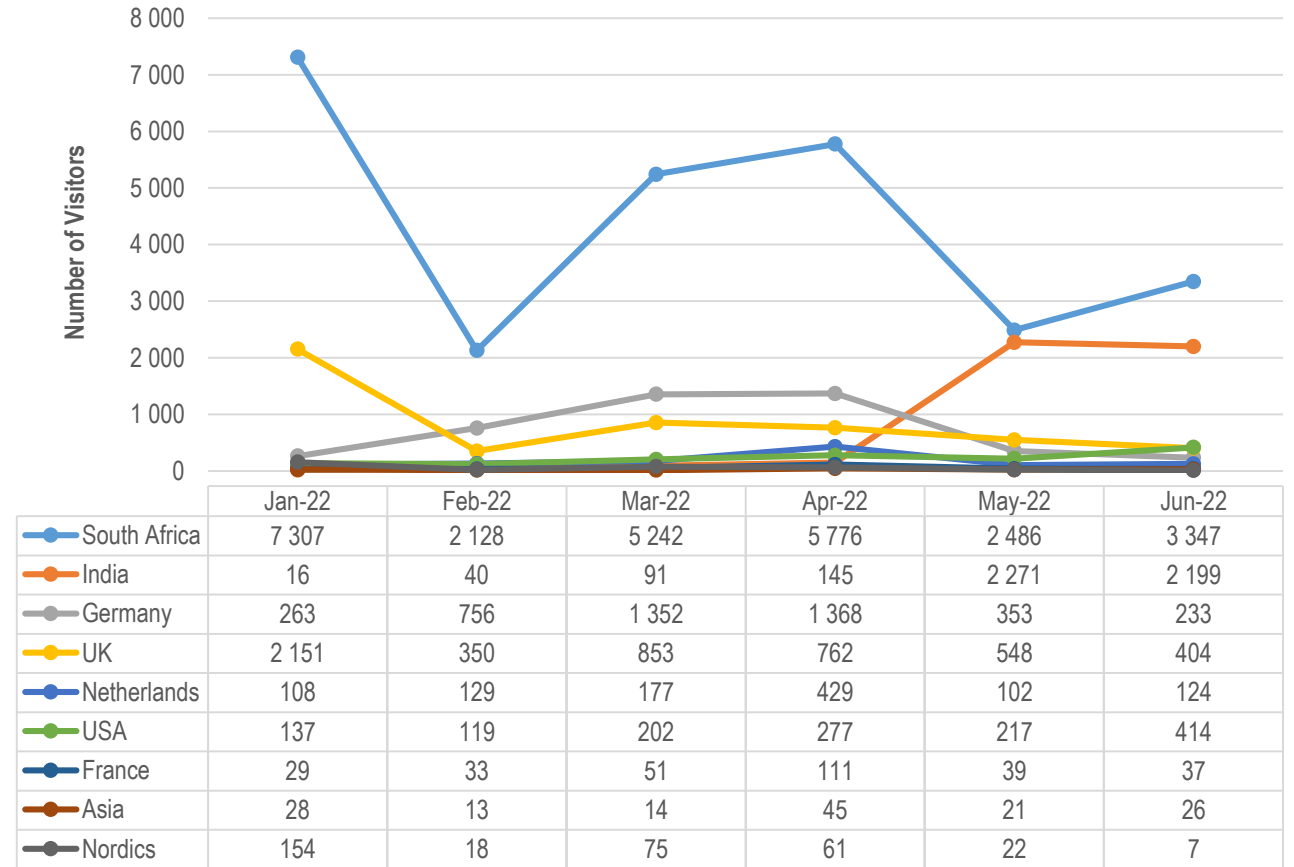
3. Garden Route & Klein Karoo Attractions

- The Cango Caves welcomed a total of 44 246 visitors over the period January to June 2022. The highest recorded number of visitors occurred in April 2022 with 9 620 patrons visiting the attraction.
- The UK, India and Germany were the top three international source markets in the first half of 2022. Overseas visitor numbers were still significantly lower than previous years but continues to strengthen as the tourism sector rebounds.
- South African visitor numbers were highest in January and April, which coincides with the Festive season and Easter breaks.



Source: Cango Caves, 2022

CANGO CAVES VISITOR DISTRIBUTION BY TOP SOURCE MARKETS: JAN - JUN 2022



Source: Cango Caves, 2022

Garden Route & Klein Karoo Visitor Trends

Wesgro Primary Research: Regional Visitor Tracking Surveys

Methodology and Sample Size

This report provides an overview of the tourism trends and patterns in George & Wilderness. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.

Definition: Tourist: refers to any visitor travelling to a place other than that of his/her own environment for more than one night, but less than 12 months and for whom the main purpose of the trip is other than the exercise of an activity remunerated for from within the place visited.

Between **January and June 2022**, a total of **169** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Garden Route & Klein Karoo. The participating Tourism Offices were:

George	114
Wilderness	55

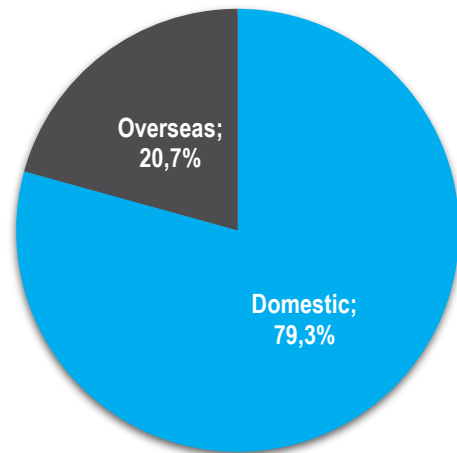


4. Garden Route & Klein Karoo Visitor Trends

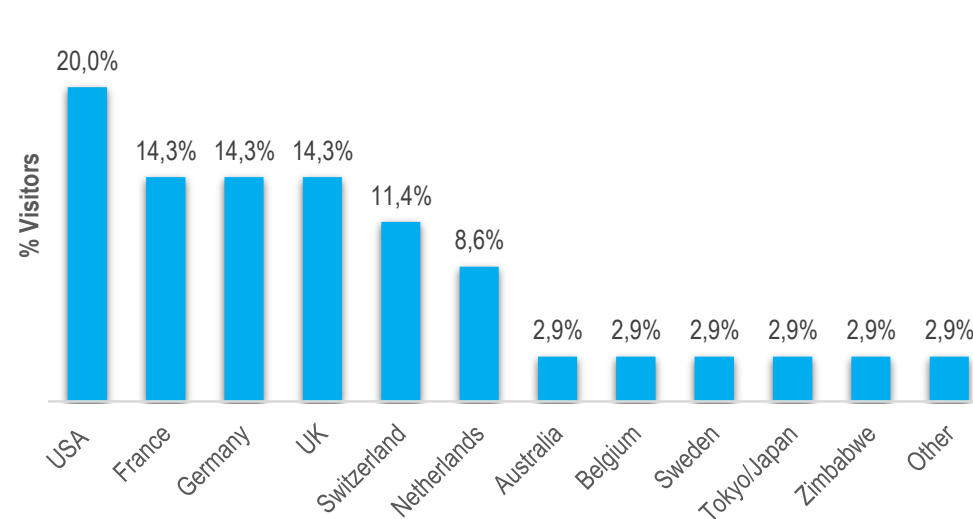
4.1 Origin of Visitors

- The domestic market accounted for the largest (79,3%) share of respondents recorded between January and June 2022 and the overseas market made up 20,7%.
- USA ranked as the region's top international market followed by France, Germany and United Kingdom.
- The largest share of domestic travellers to the region originated from within the Western Cape (50,7%), confirming that the Garden Route & Klein Karoo is a popular tourism destination among locals. Gauteng and Eastern Cape ranked as the other leading source provinces to the region.

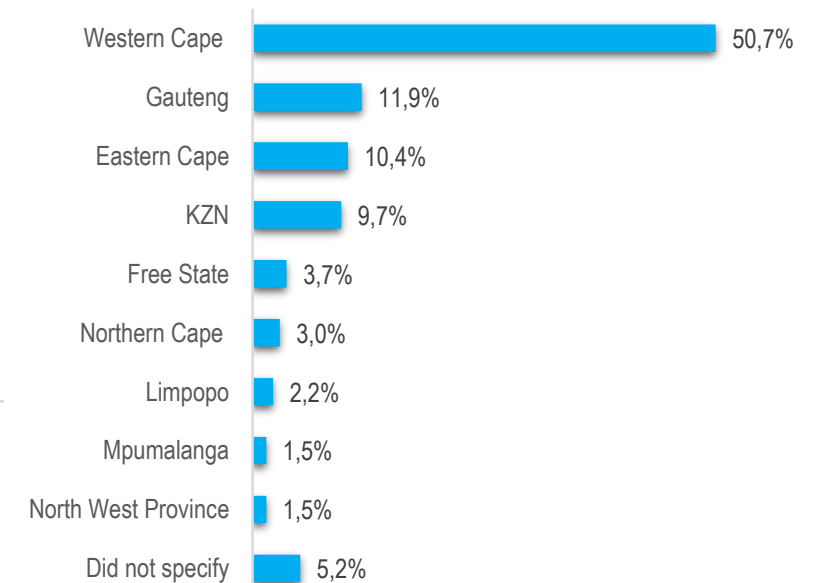
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE GARDEN ROUTE & KLEIN KAROO, JAN – JUN 2022



TOP INTERNATIONAL VISITORS TO THE GARDEN ROUTE & KLEIN KAROO, JAN – JUN 2022

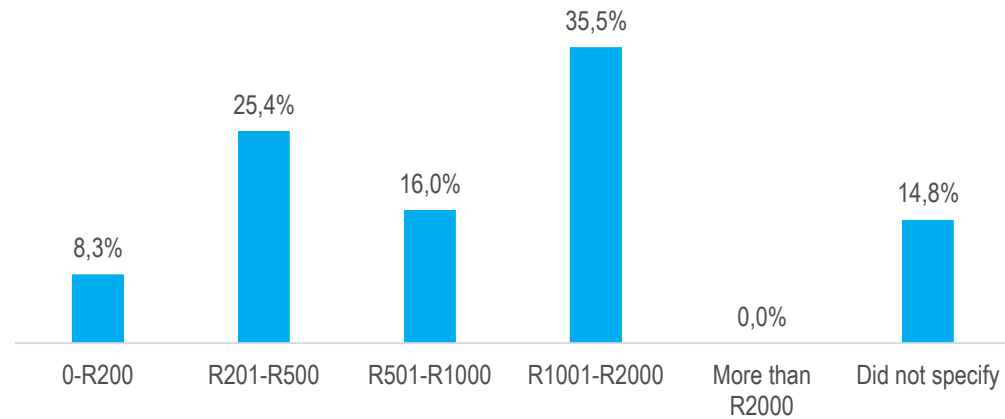


% SHARE OF DOMESTIC VISITORS TO THE GARDEN ROUTE & KLEIN KAROO, JAN – JUN 2022



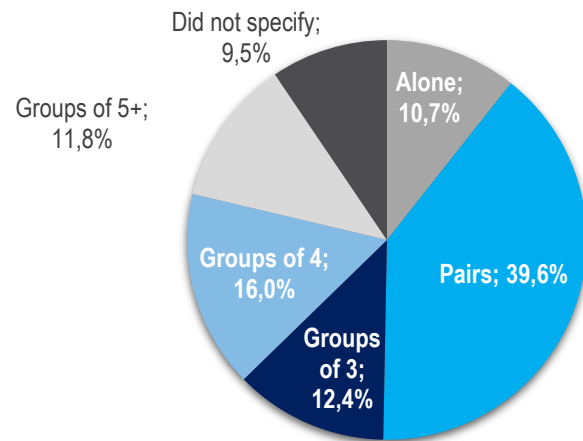
4. Garden Route & Klein Karoo Visitor Trends

4.2 Average Daily Spend

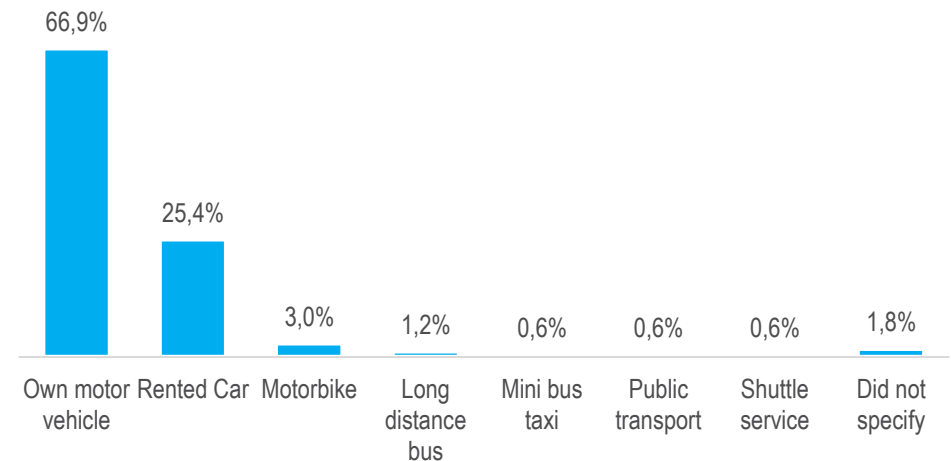


- A third of visitors to the Garden Route & Klein Karoo spent between R1001 and R2000 on average while 25,4% of visitors spent between R201 and R500.
- Two fifths of respondents travelled in pairs, followed by 16% who travelled in groups of four.
- Majority of respondents travelled to the region via their own motor vehicles (66,9%) or rented cars (25,4%).

4.3 Travel Group Size

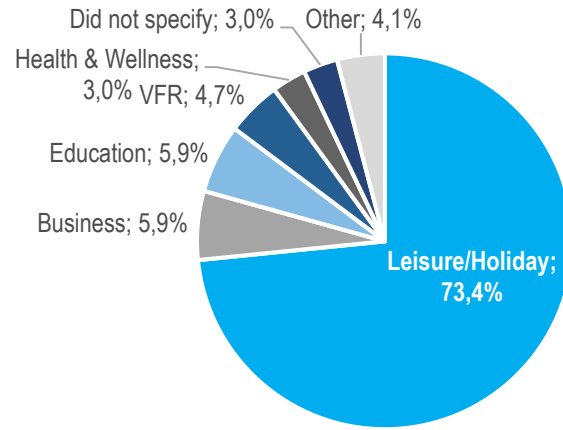


4.4 Mode of Transport



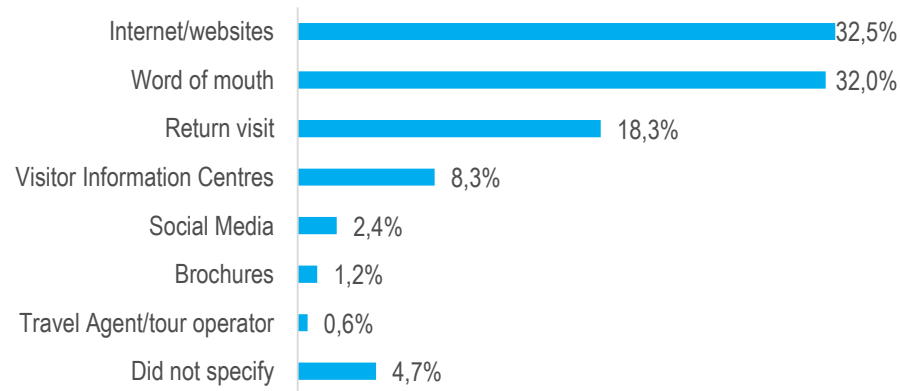
4. Garden Route & Klein Karoo Visitor Trends

4.5 Purpose of Visit

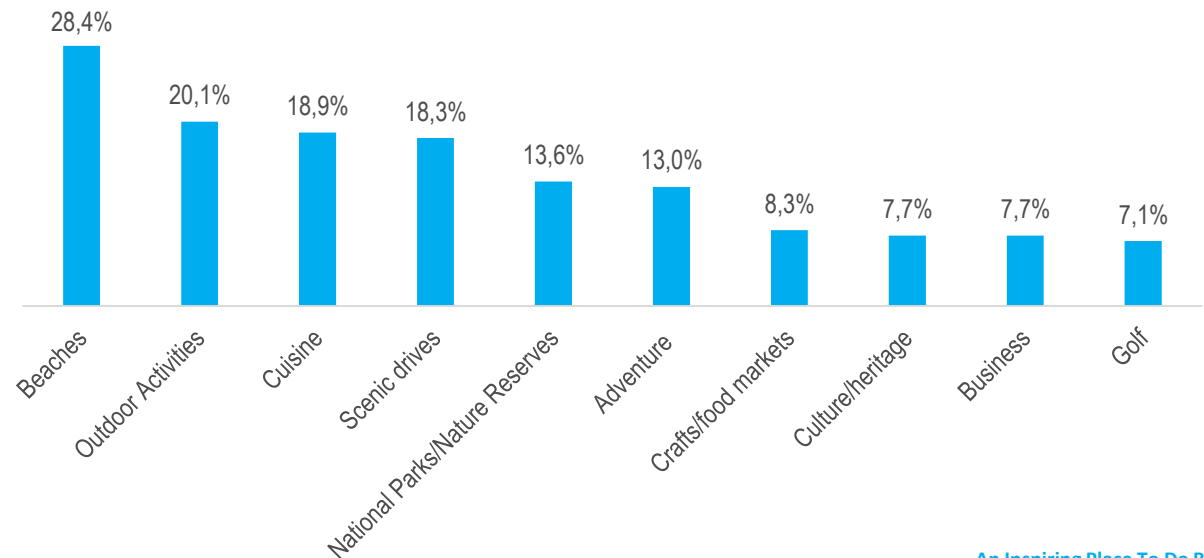


- The most prominent motivating factor for travel to the Garden Route & Klein Karoo was for the purpose of holiday/leisure (73,4%) followed by business (5,9%) and education (5,9%).
- Those in the 'Other' category include religion, honeymoon/weddings, seasonal/migrant worker and sport.
- Beaches (28,4%), outdoor activities (20,1%), and cuisine (18,9%) were the top 3 activities undertaken in the region.
- Internet/websites (32,5%), word of mouth (32%) and return visits (18,3%) were the top 3 sources used by visitors to gather information about the region.

4.6 Top Information Sources

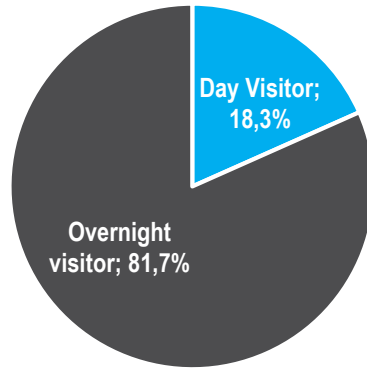


4.7 Top Activities undertaken in the Garden Route & Klein Karoo



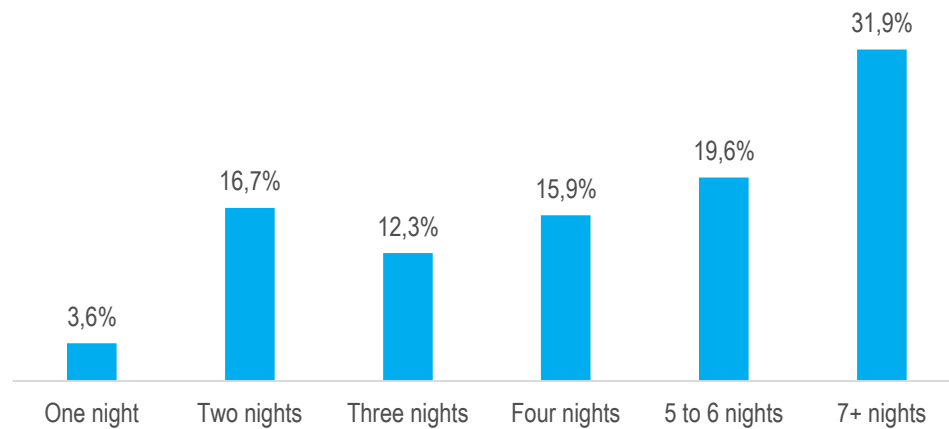
4. Garden Route & Klein Karoo Visitor Trends

4.8 Overnight Stay

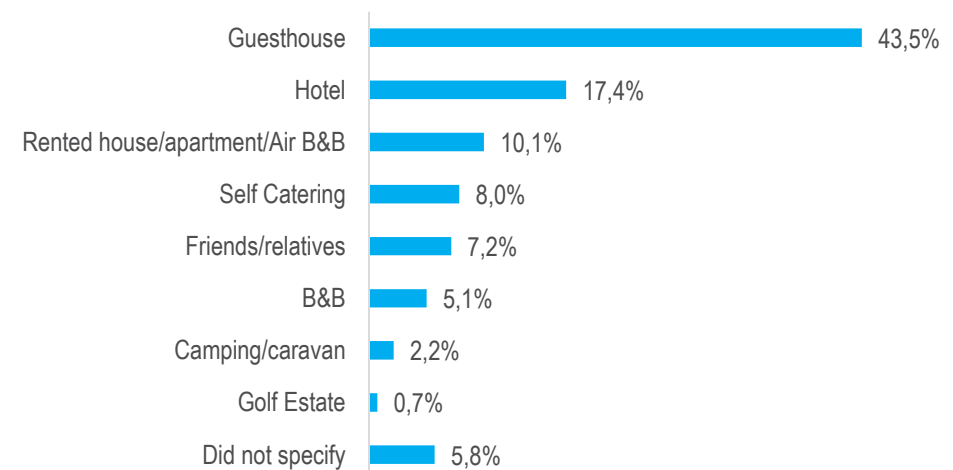


- More than 80% of respondents indicated overnight stays and 18,3% were day visitors.
- Close to a third of overnight visitors stayed for 7 nights and more, followed by 5 – 6 nights (19,6%) and two nights (16,7%).
- Respondents indicated their preferred accommodation type to be guesthouse (43,5%), followed by hotel (17,4%), and rented accommodation (10,1%).

4.9 Average Length of Stay



4.10 Accommodation Usage



Garden Route & Klein Karoo Visitor Trends

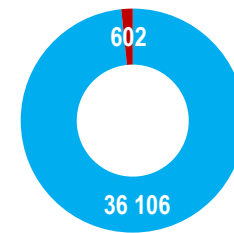
Mobile Location Data Insights

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 **36 160 domestic** and **602 international** tourists who visited the Garden Route & Klein Karoo between January and June 2022. Within the domestic data set, close to a third of the sampled tourists were from the City of Cape Town and from the international sampled tourists, 399 were from the USA.

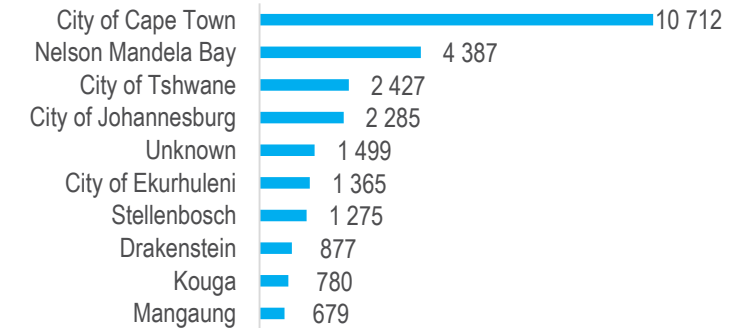
Sample Size, Jan – Jun 2022



■ Domestic ■ International

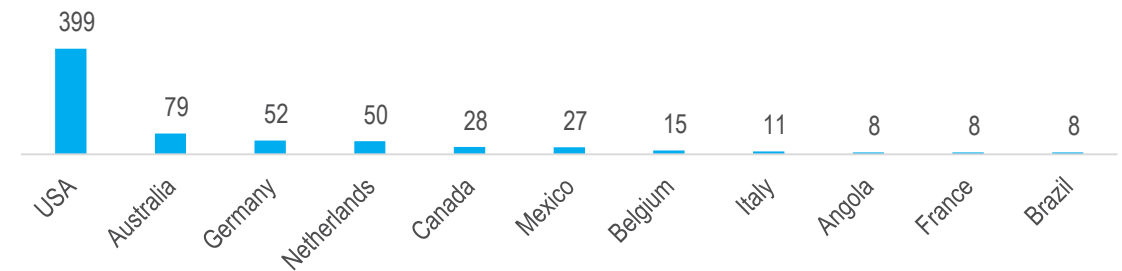
Source: Rove, 2022

Domestic Origin Municipality, Jan - Jun 2022



Source: Rove, 2022

International Origin Country, Jan - Jun 2022

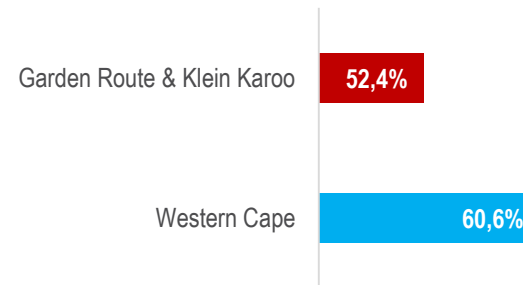


Source: Rove, 2022

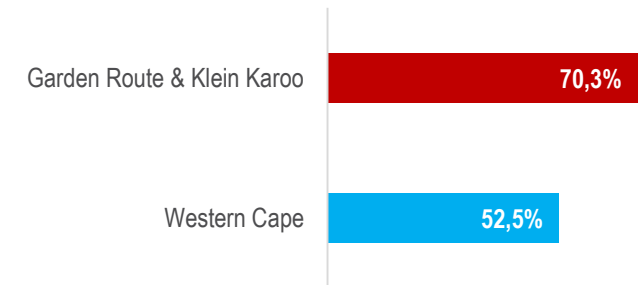
5.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic visitors spent 3,9 days in the Garden Route & Klein Karoo which is longer than the general average for the province (2,6 days).
- Over 70% of sampled domestic tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (52,5%). *An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.*
- More than half 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 (60,6%). *A repeat visitor is defined as one who visited the region more than once within the review period.*

Domestic repeat visitors, Jan – Jun 2022

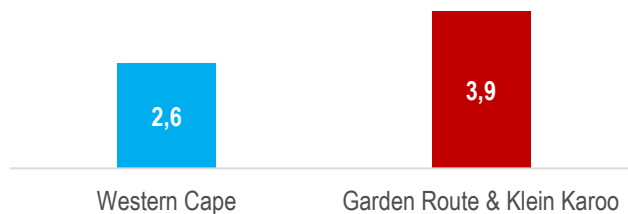


Percent of Domestic Sample who stayed overnight, Jan – Jun 2022

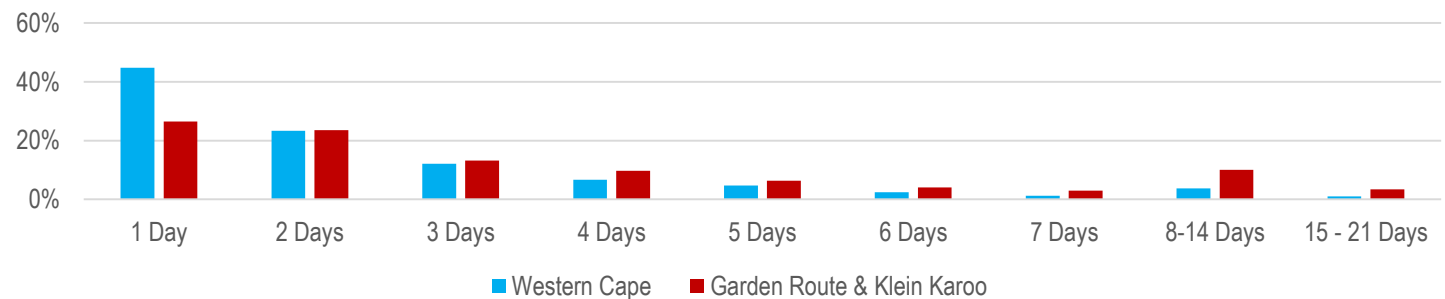


Source: Rove, 2022

Average Length of Stay (LOS): Domestic, Jan - Jun 2022



Average Length of Stay (number of days): Domestic, Jan - Jun 2022

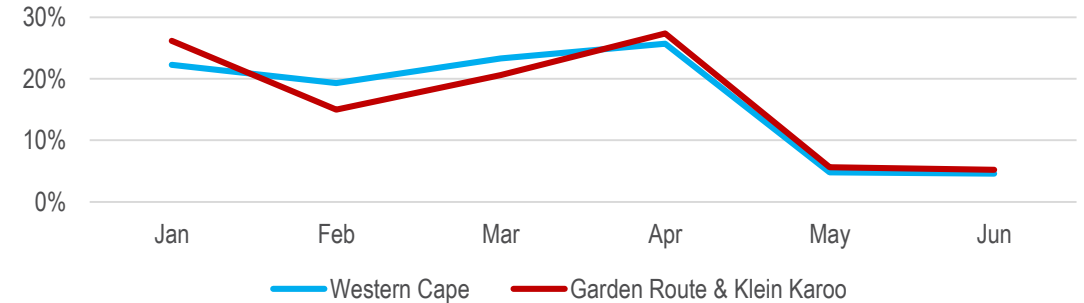


Source: Rove, 2022

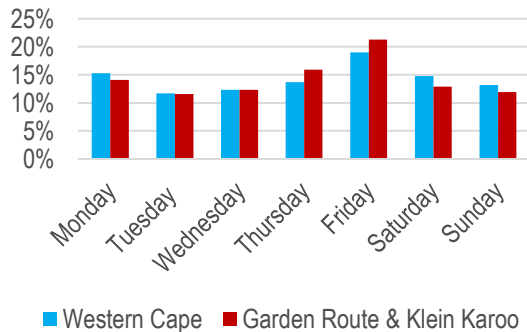
5.1. Mobile Insights: Domestic Visitor Trends

- Domestic visitors to the Garden Route & Klein Karoo were most likely to arrive on a Friday (21%) and depart on a Sunday (20%).
- April was their most popular month to visit the region, followed by January and March.
- January and April were the most popular months for overnight stays among domestic tourists to the Garden Route & Klein Karoo.

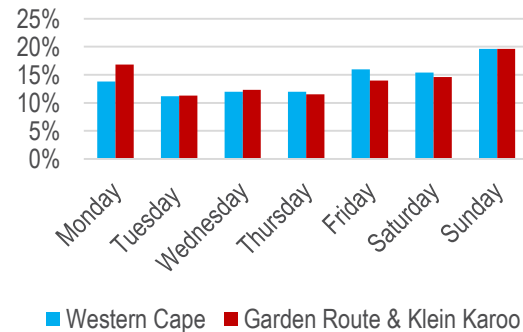
Popular Months for Sampled Domestic Tourists, Jan - Jun 2022



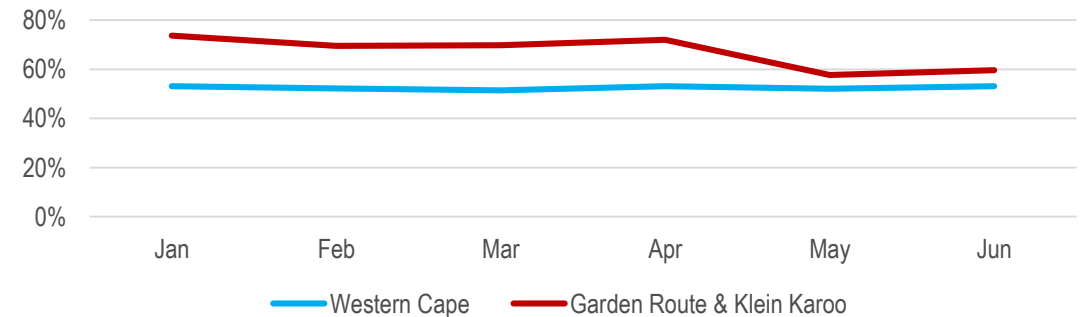
Popular Arrival Days of the Week: Domestic, Jan - Jun 2022



Popular Departure Days of the Week: Domestic, Jan - Jun 2022



% of Sampled Domestic Tourists who stayed overnight by month, Jan - Jun 2022



GR & KK – Garden Route and Klein Karoo

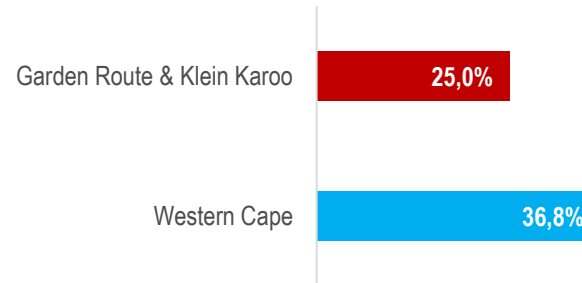
Source: Rove, 2022

Source: Rove, 2022

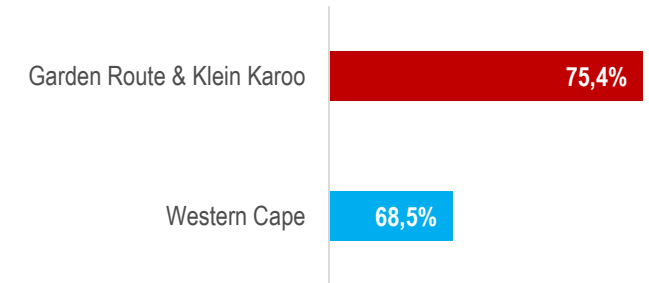
5.2. Mobile Insights: International Visitor Trends

- On average, international visitors spent 3,4 days in the Garden Route & Klein Karoo which is just slightly longer than the general average for the province (3,2 days).
- 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 (68,5%). *An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.*
- 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 (36,8%). *A repeat visitor is defined as one who visited the region more than once within the review period.*

International repeat visitors: Jan - Jun 2022

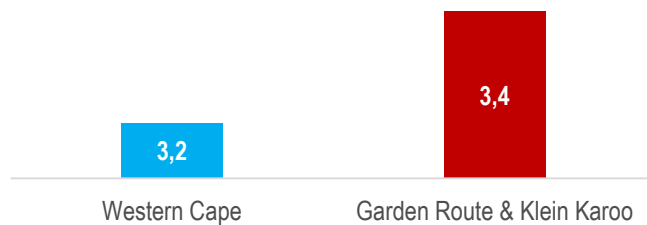


Percent of International Sample who stayed overnight, Jan – Jun 2022

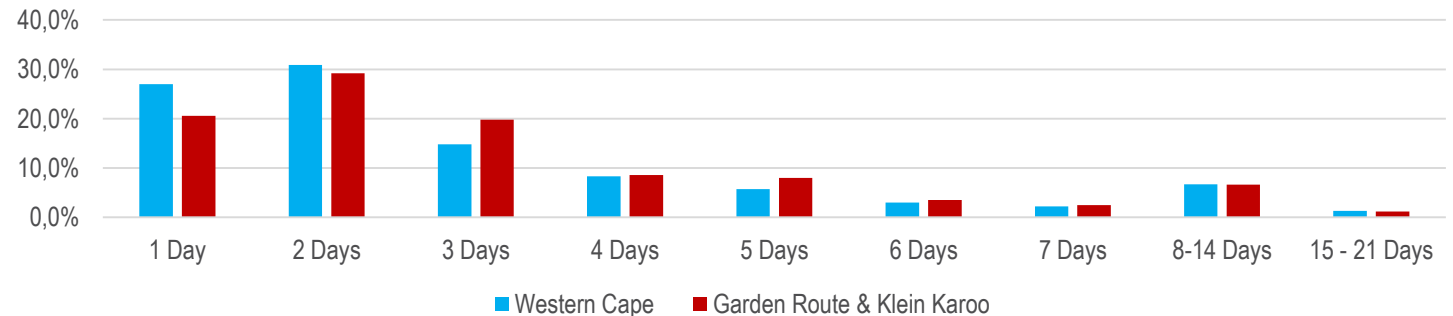


Source: Rove, 2022

Average Length of Stay (LOS): International, Jan - Jun 2022



Average Length of Stay (number of days): International, Jan – Jun 2022

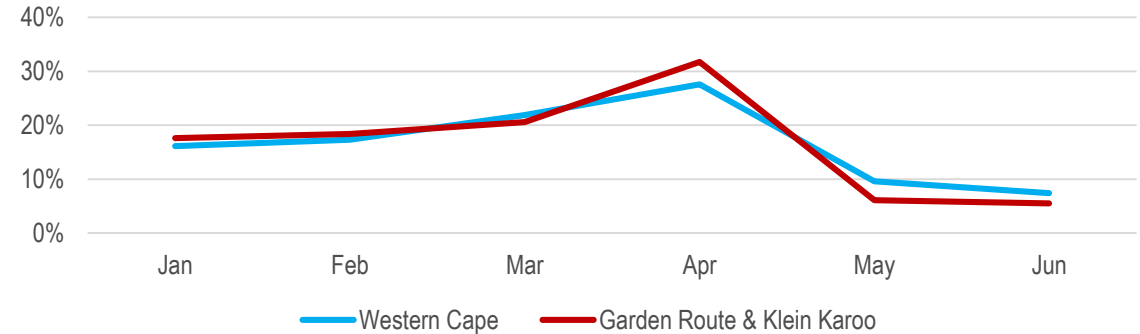


Source: Rove, 2022

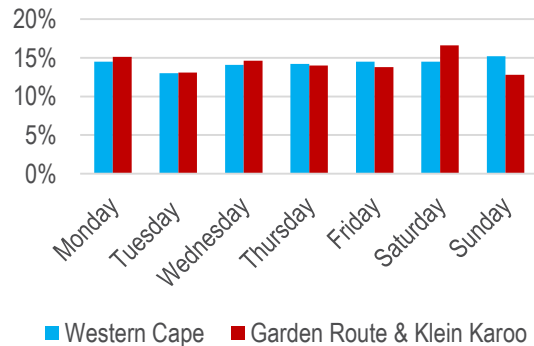
5.2. Mobile Insights: International Visitor Trends

- International visitors to the Garden Route & Klein Karoo were most likely to arrive on a Saturday (17%) or Monday (15%) and depart on a Friday (17%) or Saturday (16%).
- April was their most popular month to visit the region in the first half of 2022, followed by March and February.
- April and March were the most popular months for overnight stays among international tourists to the Garden Route & Klein Karoo.

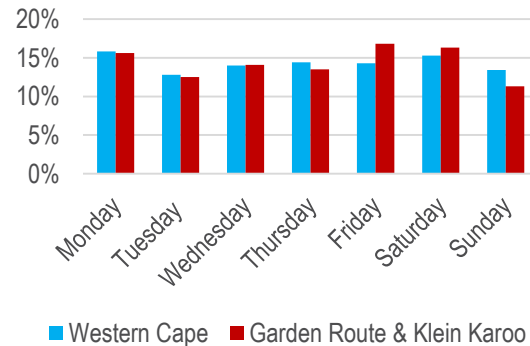
Popular Months for Sampled International Tourists, Jan – Jun 2022



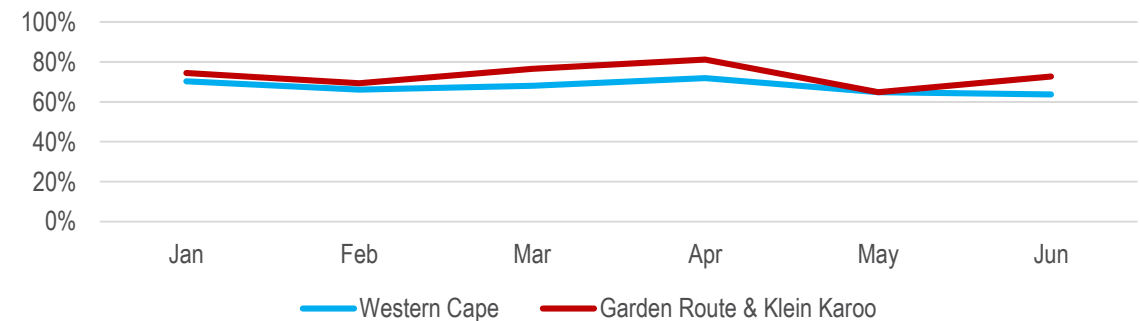
Popular Arrival Days of the Week: International, Jan – Jun 2022



Popular Departure Days of the Week: International, Jan - Jun 2022



% of Sampled International Tourists who stayed overnight by month, Jan – Jun 2022

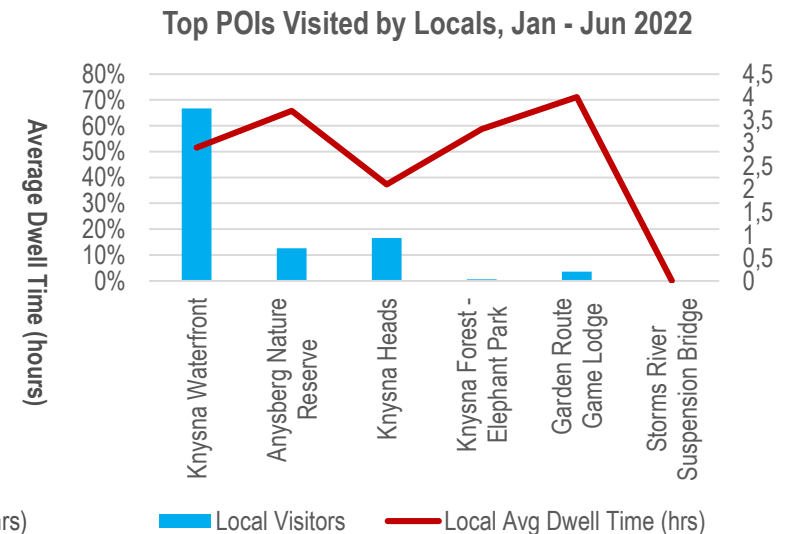
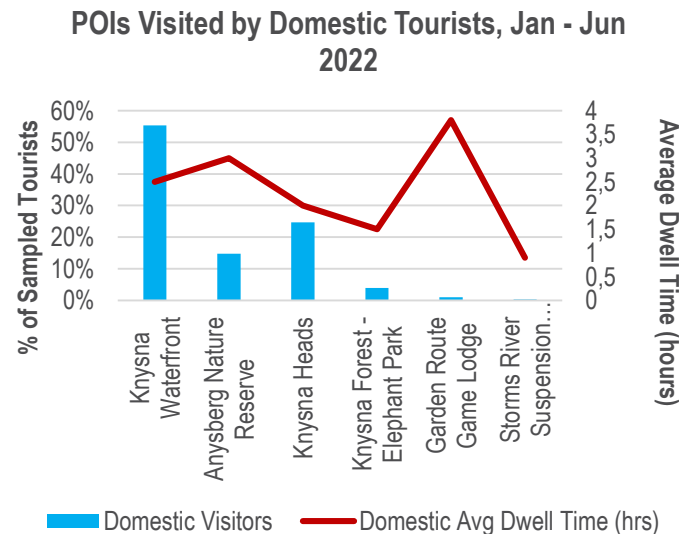
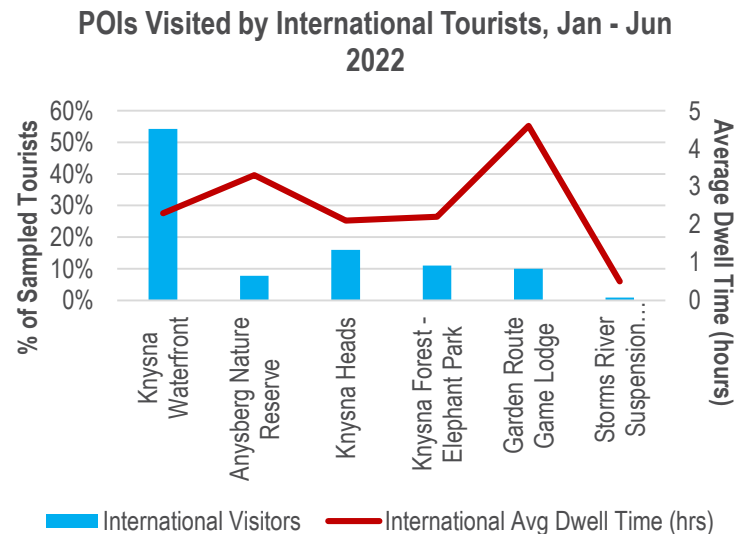


Source: Rove, 2022

Source: Rove, 2022

5.3. Points of Interest (POIs) Visited

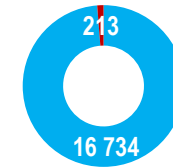
- Knysna Waterfront was a popular attraction visited by international, domestic and local tourists.
- International visitors spent on average 2,3 hours at Knysna Waterfront while domestic and local visitors spent 2,5 hours and 2,9 hours at the attraction, respectively.
- Garden Route Game Lodge saw the longest average dwell time across all tourist segments. International tourists spent on average 4,6 hours, while domestic and local tourists spent 3,8 hours and 4 hours, respectively.
- Knysna Heads ranked second across all tourist segments with around 2 hours average dwell time spent.
- Anysberg Nature Reserve was the third most popular POI for locals and domestic tourists while international tourists spent a lot of time at Knysna Forest: Elephant Park and Garden Route Game Lodge.



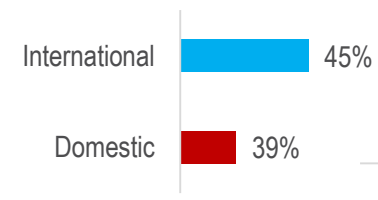
5.4. Mobile Insights: George Visitor Trends

- Nearly half of international tourists and close to two fifths of domestic tourists stayed overnight in George in the first half of 2022. Repeat visitors accounted for 51% in domestic and 41% in the international categories.
- For domestic visitors, April was the most popular month to visit, followed by March and January. While, March ranked as the most popular month for international tourists, followed by April and January.
- May and June were the most popular months for overnight stays among both domestic and international tourists.
- Fridays and Mondays were the most popular arrival days for both domestic and international tourists. For international tourists, Fridays and Wednesdays were most popular departure days while domestic tourists departed on Fridays and Saturdays.

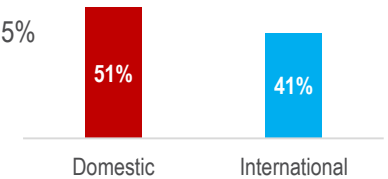
Sample Size



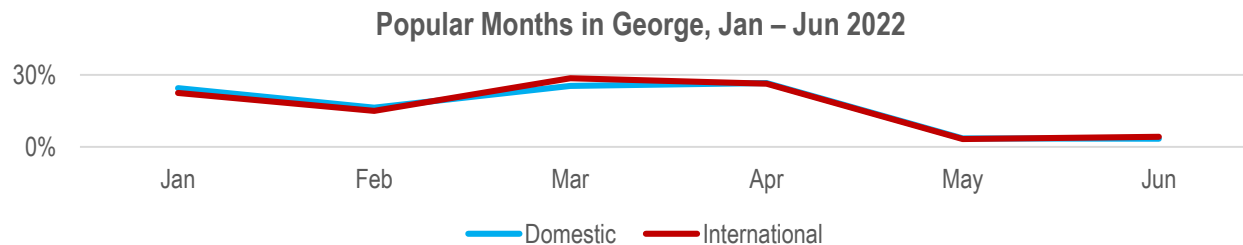
Overnight stays in George, Jan – Jun 2022



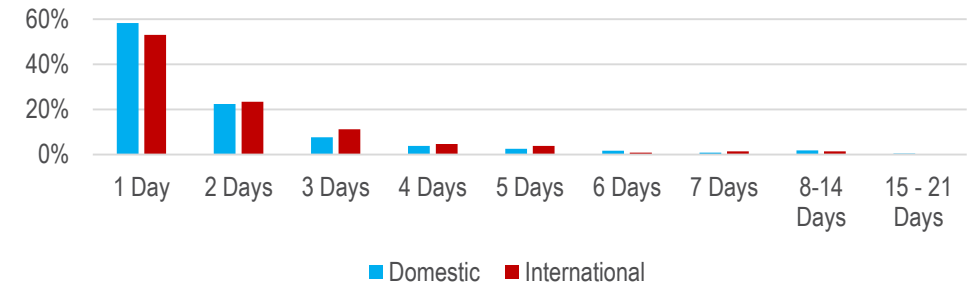
Repeat visitors in George, Jan – Jun 2022



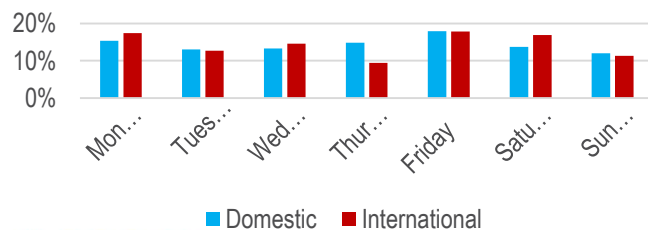
■ Domestic ■ International



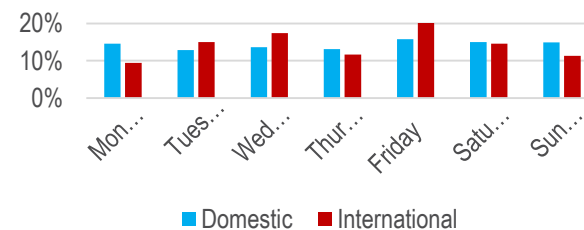
Average Length of Stay (number of days) in George, Jan - Jun 2022



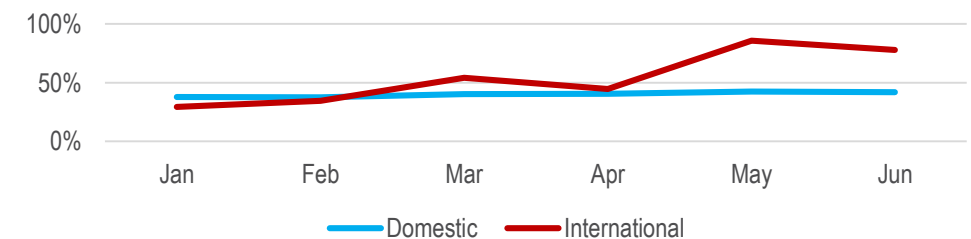
Popular Arrival Days of the Week in George, Jan – Jun 2022



Popular Departure Days of the Week in George, Jan – Jun 2022



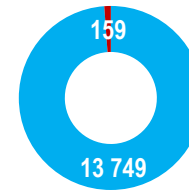
% of Sampled Tourists who stayed overnight in George, Jan – Jun 2022



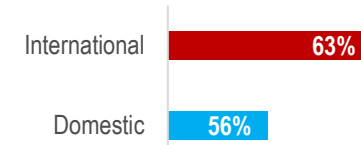
5.5. Mobile Insights: Mossel Bay Visitor Trends

- More than half of domestic tourists and close to two thirds of international tourists stayed overnight in Mossel Bay in the first half of 2022. Repeat visitors accounted for 45% in domestic and 25% in the international categories.
- For domestic visitors, April was the most popular month to visit, followed by March and January. While April, March and February ranked as the most popular months for international tourists.
- January and April were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in June and March.
- Fridays and Thursdays were the most popular arrival days for domestic visitors and Sundays and Mondays were their most popular departure days. For international visitors, Thursdays and Tuesdays were most popular arrival days and departure was most popular on Tuesdays and Fridays.

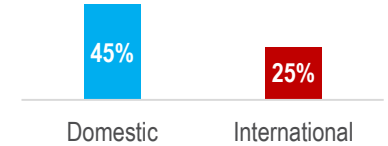
Sample Size



Overnight stays in Mossel Bay, Jan - Jun 2022

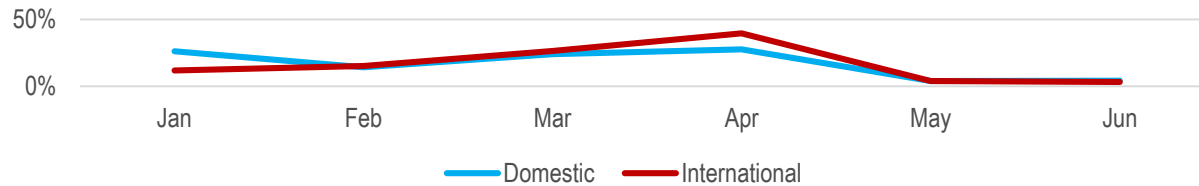


Repeat visitors in Mossel Bay, Jan - Jun 2022

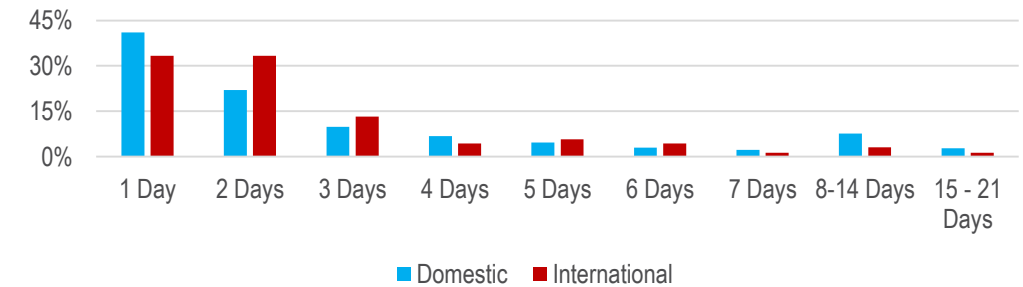


■ Domestic ■ International

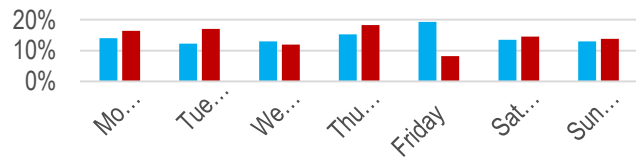
Popular Months in Mossel Bay, Jan - Jun 2022



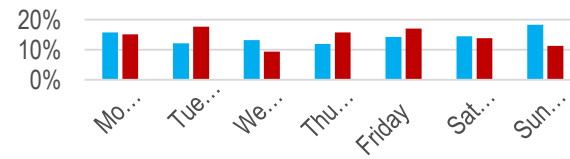
Average Length of Stay (number of days) in Mossel Bay, Jan - Jun 2022



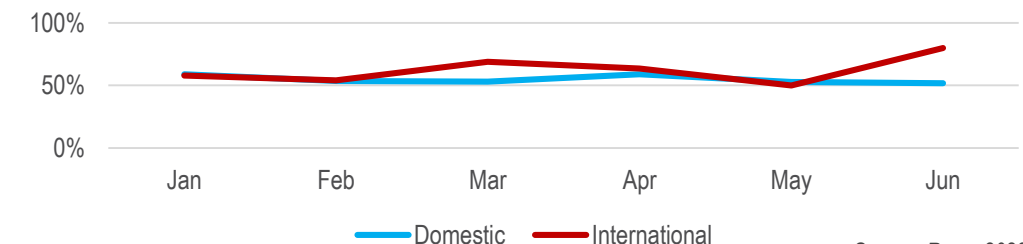
Popular Arrival Days of the Week in Mossel Bay, Jan - Jun 2022



Popular Departure Days of the Week in Mossel Bay, Jan - Jun 2022



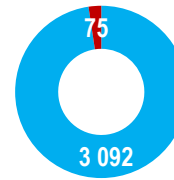
% of Sampled Tourists who stayed overnight in Mossel Bay, Jan - Jun 2022



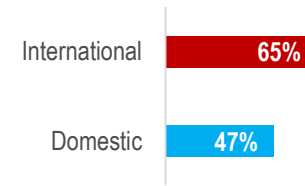
5.6. Mobile Insights: Oudtshoorn Visitor Trends

- Close to half of domestic and just under two thirds of international tourists stayed overnight in Oudtshoorn in the first half of 2022. Repeat visitors accounted for 30% in domestic and 18% in the international categories.
- For domestic visitors, April was the most popular month to visit, followed by March and January. While, March ranked as the most popular month for international tourists, followed by February and January.
- May and January were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in May and June.
- Fridays were the most popular arrival days for domestic visitors and Saturdays and Sundays were their most popular departure days. For international visitors, arrival was most popular on a Wednesday and Monday was the most common day of departure.

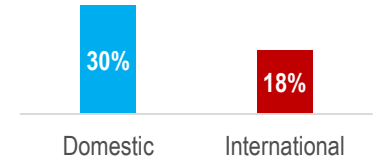
Sample Size



Overnight stays in Oudtshoorn, Jan - Jun 2022

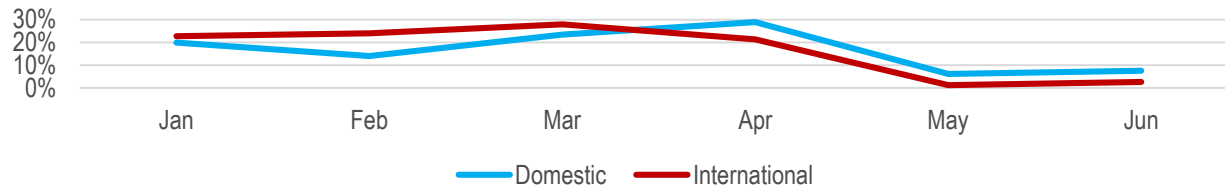


Repeat visitors in Oudtshoorn, Jan - Jun 2022

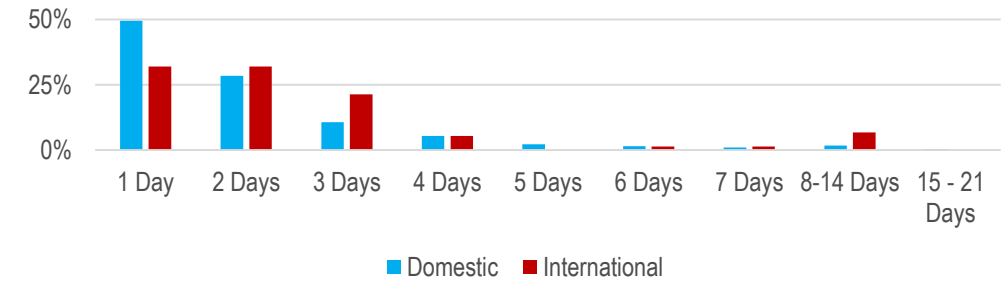


■ Domestic ■ International

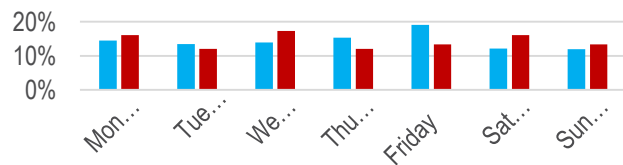
Popular Months in Oudtshoorn, Jan - Jun 2022



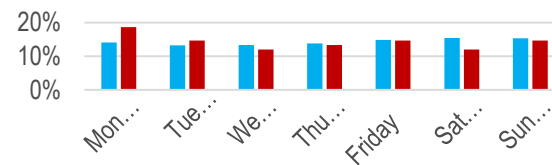
Average Length of Stay (number of days) in Oudtshoorn, Jan - Jun 2022



Popular Arrival Days of the Week in Oudtshoorn, Jan - Jun 2022



Popular Departure Days of the Week in Oudtshoorn, Jan - Jun 2022



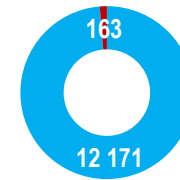
■ Domestic ■ International

■ Domestic ■ International

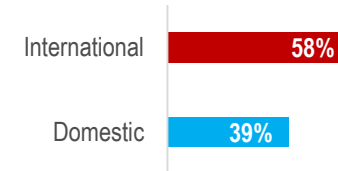
5.7. Mobile Insights: Plettenberg Bay Visitor Trends

- More than half of international tourists and just under two fifths of domestic tourists stayed overnight in Plettenberg Bay in the first half of 2022. Repeat visitors accounted for 51% in domestic and 15% in the international categories.
- For domestic visitors, April was the most popular month to visit, followed by January and March. While, April, March and February ranked as the most popular month for international tourists.
- January and April were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in June and January.
- Fridays were the most popular arrival days for domestic visitors and Sundays were their most popular departure days. For international visitors, Mondays were most popular arrival and departure days.

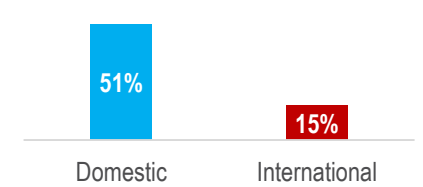
Sample Size



Overnight stays in Plettenberg Bay, Jan - Jun 2022

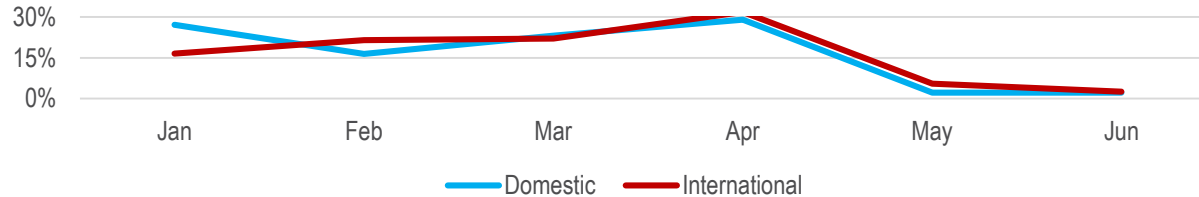


Repeat visitors in Plettenberg Bay, Jan - Jun 2022

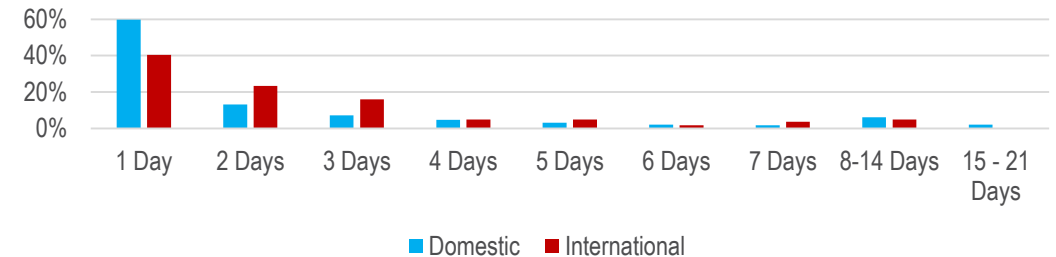


■ Domestic ■ International

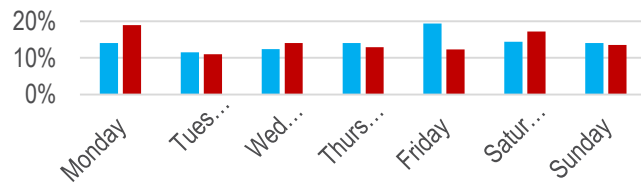
Popular Months in Plettenberg Bay, Jan - Jun 2022



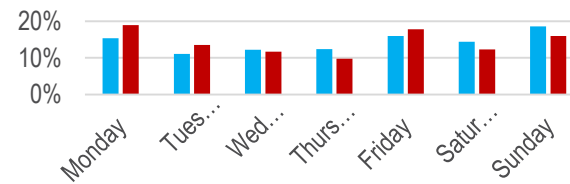
Average Length of Stay (number of days) in Plettenberg Bay, Jan - Jun 2022



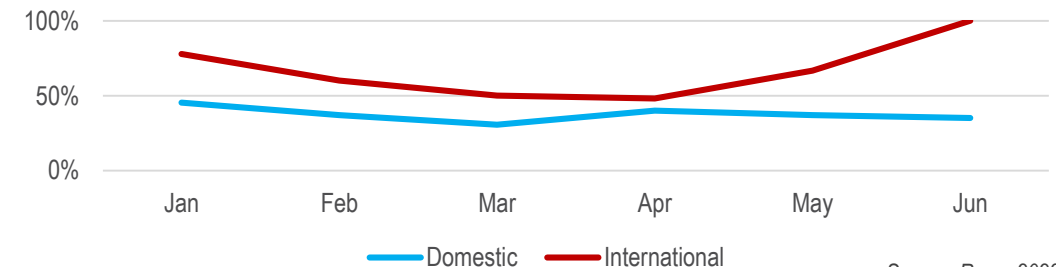
Popular Arrival Days of the Week in Plettenberg Bay, Jan - Jun 2022



Popular Departure Days of the Week in Plettenberg Bay, Jan - Jun 2022



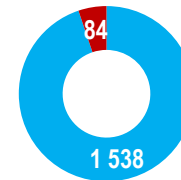
% of Sampled Tourists who stayed overnight in Plettenberg Bay, Jan - Jun 2022



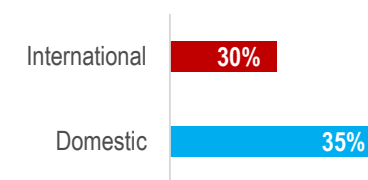
5.8. Mobile Insights: Thesen Island Visitor Trends

- Around a third of both international and domestic tourists stayed overnight in Thesen Island in the first half of 2022. Repeat visitors accounted for 32% in domestic and 18% in the international categories.
- For domestic visitors, January was the most popular month to visit, followed by April and March. While, April, February and March ranked as the most popular month for international tourists.
- June and January were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in May and March.
- Fridays were the most popular arrival days for domestic tourists and Saturdays were their most popular departure days. For international tourists, arrival was most popular on a Monday, and Tuesday was the most common day of departure.

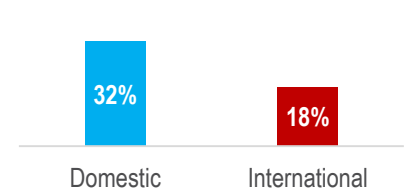
Sample Size



Overnight stays in Thesen Island, Jan - Jun 2022

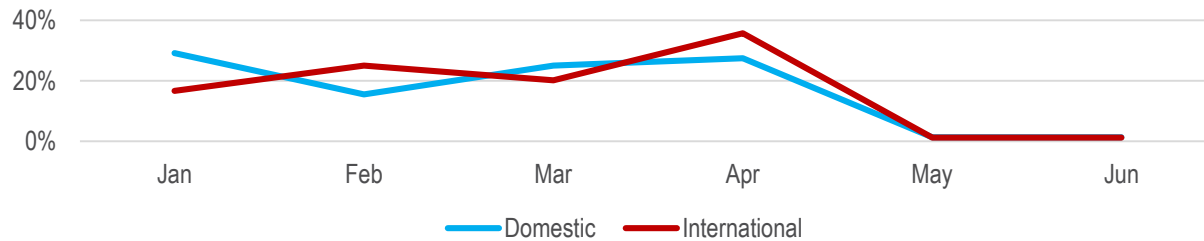


Repeat visitors in Thesen Island, Jan - Jun 2022

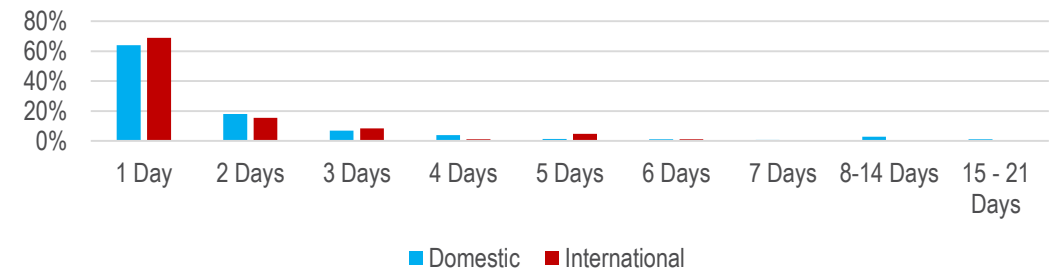


■ Domestic ■ International

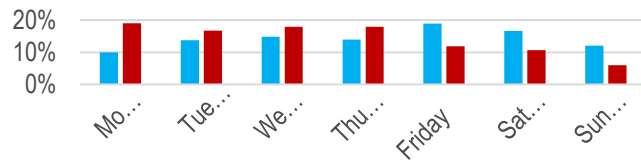
Popular Months in Thesen Island, Jan - Jun 2022



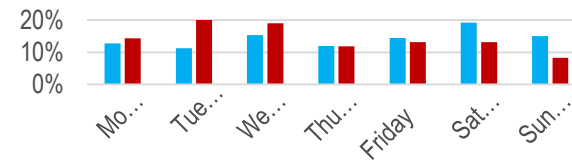
Average Length of Stay (number of days) in Thesen Island, Jan - Jun 2022



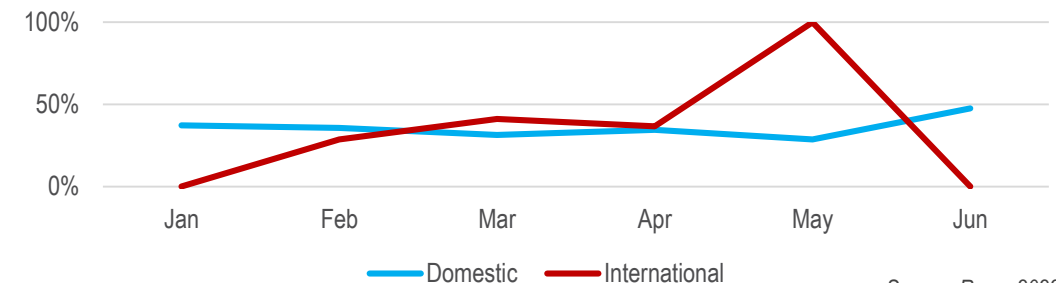
Popular Arrival Days of the Week in Thesen Island, Jan - Jun 2022



Popular Departure Days of the Week in Thesen Island, Jan - Jun 2022



% of Sampled Tourists who stayed overnight in Thesen Island, Jan - Jun 2022

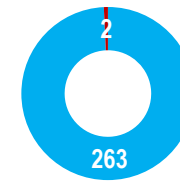


5.9. Mobile Insights: Uniondale Visitor Trends

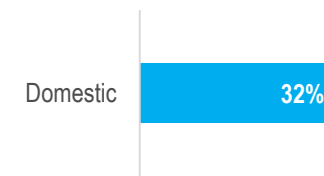
*International sample size not sufficient for a complete statistical representation.

- Close to a third of domestic tourists stayed overnight in Uniondale in the first half of 2022 and 15% of domestic visitors travelled to the town more than once within the review period.
- For domestic visitors, March (32%) was the most popular month to visit, followed by April (29%) and February (17%).
- January and April were the most popular months for overnight stays among domestic tourists, with 46% and 37% of sampled tourists staying overnight, respectively.
- Fridays and Thursdays were the most popular arrival days for domestic visitors and Fridays, Thursdays and Saturdays were their most popular departure days.

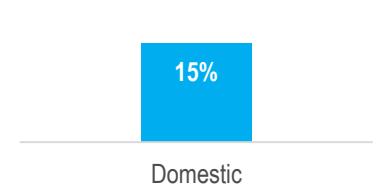
Sample Size



Overnight stays in Uniondale, Jan - Jun 2022

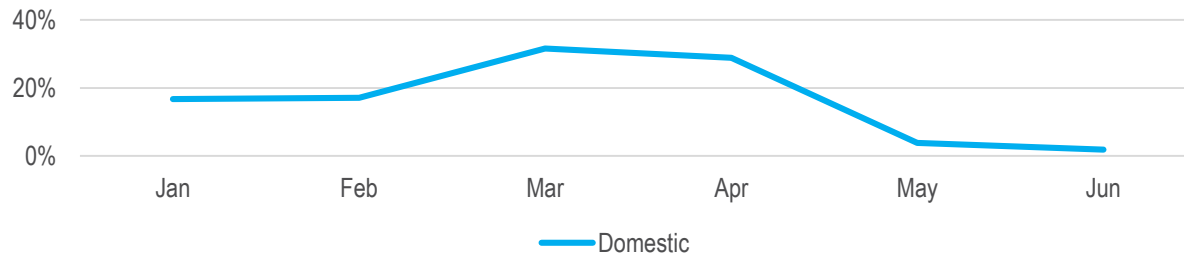


Repeat visitors in Uniondale, Jan - Jun 2022

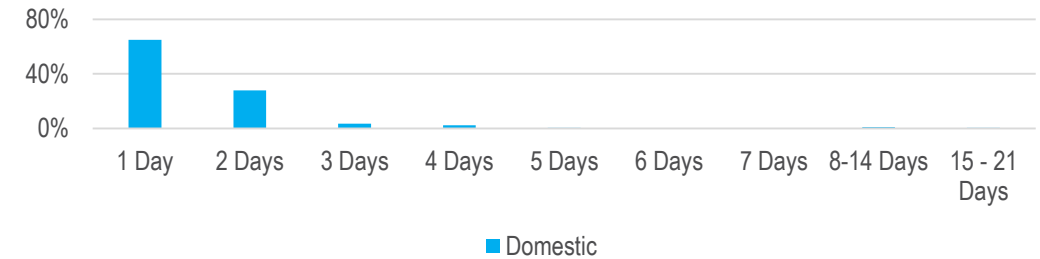


■ Domestic ■ International

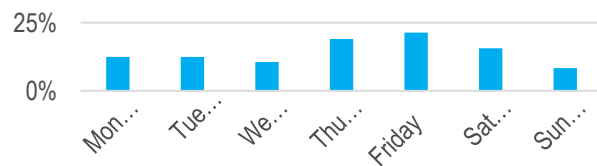
Popular Months in Uniondale, Jan - Jun 2022



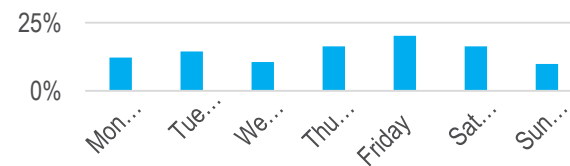
Average Length of Stay (number of days) in Uniondale Jan - Jun 2022



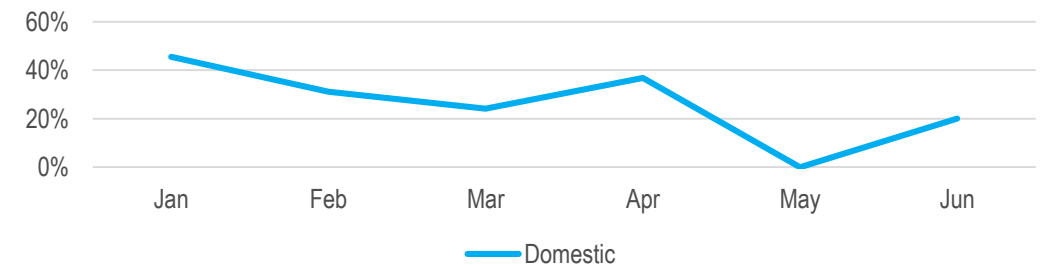
Popular Arrival Days of the Week in Uniondale, Jan - Jun 2022



Popular Departure Days of the Week in Uniondale, Jan - Jun 2022



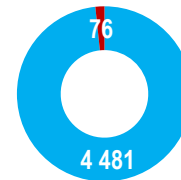
% of Sampled Tourists who stayed overnight in Uniondale, Jan - Jun 2022



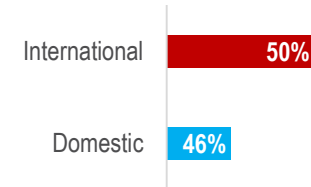
5.10. Mobile Insights: Wilderness Visitor Trends

- Half of international tourists and 46% of domestic tourists stayed overnight in Wilderness in the first half of 2022. Repeat visitors accounted for 37% in domestic and 12% in the international categories.
- For domestic visitors, January was the most popular month to visit, followed by April and March. While, March, February and April ranked as the most popular months for international tourists.
- June and May were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in May and April.
- Friday was the most popular arrival and departure day for domestic tourists. For international tourists, Fridays were their most popular arrival days and departure was most popular on Mondays.

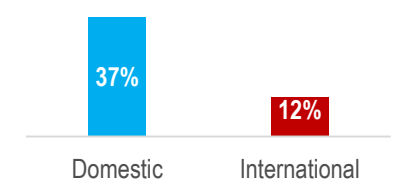
Sample Size



Overnight stays in Wilderness, Jan - Jun 2022

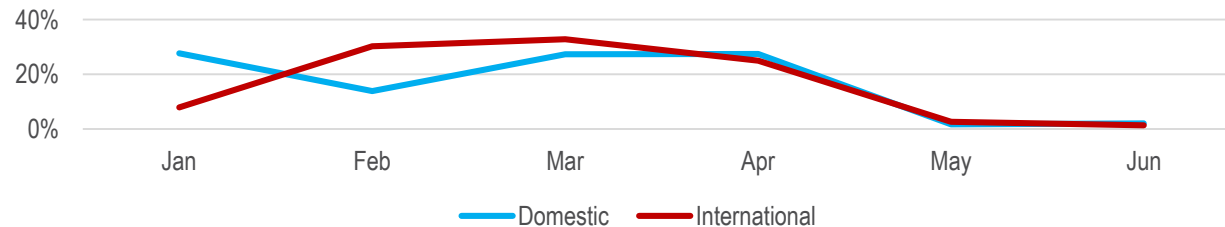


Repeat visitors in Wilderness, Jan - Jun 2022

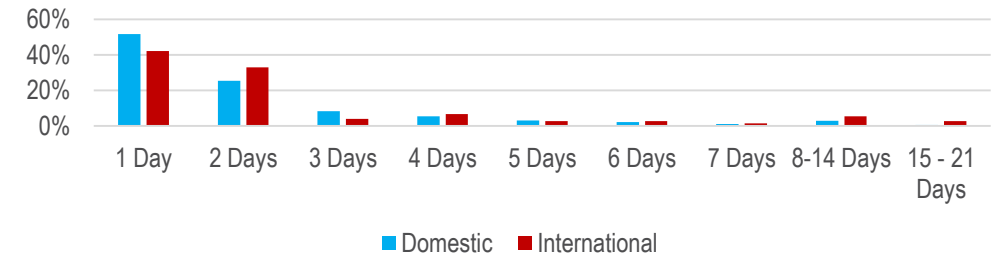


■ Domestic ■ International

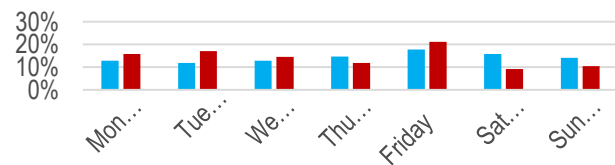
Popular Months in Wilderness, Jan - Jun 2022



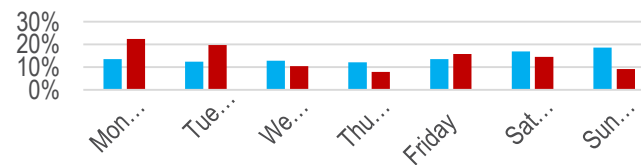
Average Length of Stay (number of days) in wilderness, Jan - Jun 2022



Popular Arrival Days of the Week in Wilderness, Jan - Jun 2022



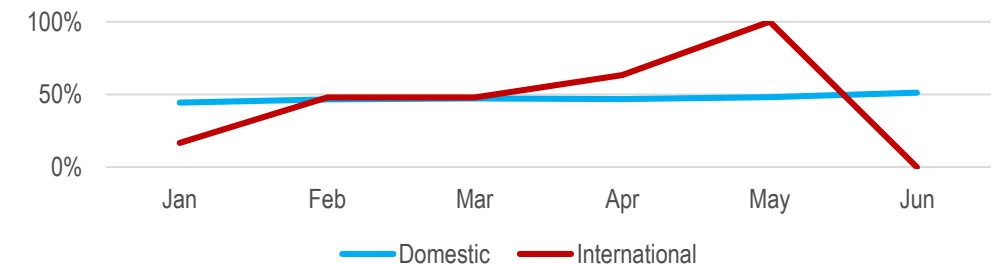
Popular Departure Days of the Week in Wilderness, Jan - Jun 2022



■ Domestic ■ International

■ Domestic ■ International

% of Sampled Tourists who stayed overnight in Wilderness, Jan - Jun 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 calculated from 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.

6. Acknowledgements

Acknowledgements and many thanks go to the following for supplying the primary data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism office in the Garden Route & Klein Karoo:

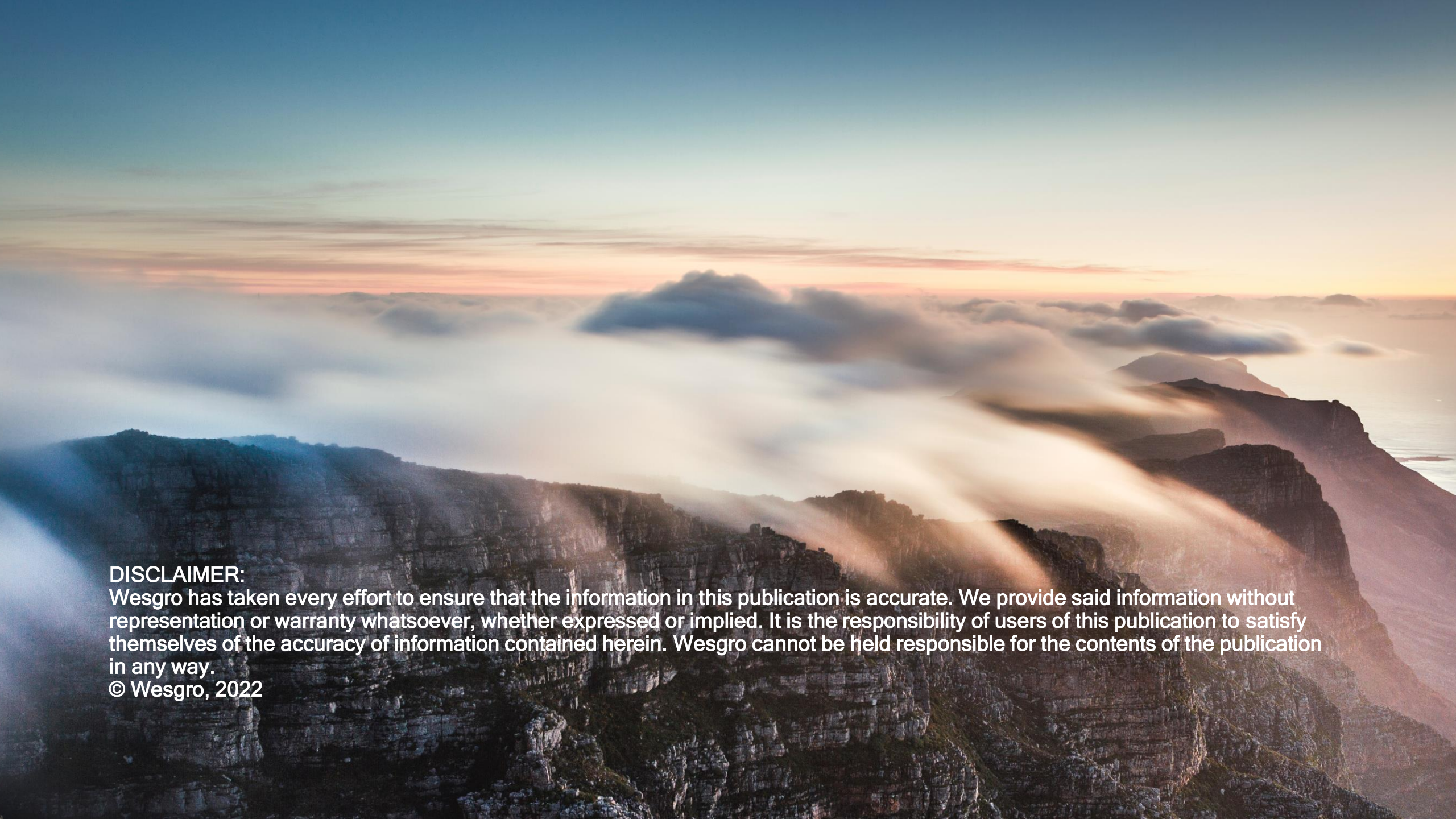
George
Wilderness

The participating attractions in the Garden Route & Klein Karoo:

Cango Caves
Tsitsikamma National Park
Wilderness National Park
Knysna National Park

7. 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



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