



Cape Karoo Tourism Trends

January-December 2021



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1. Cape Karoo Mobile Location Data Insights

What is mobile location data?

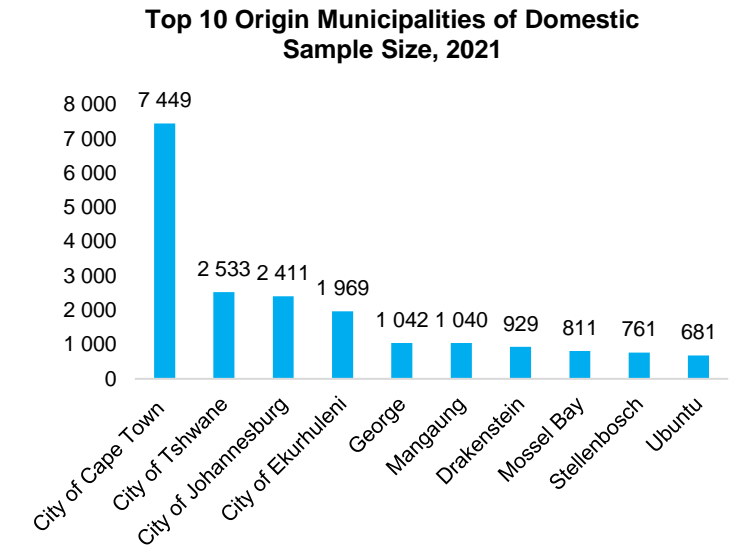
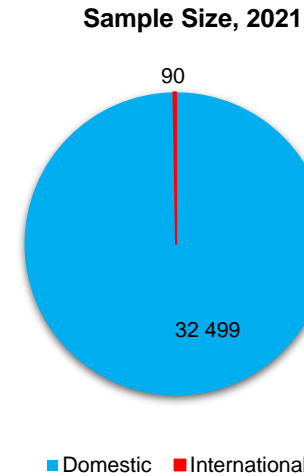
Mobile location data is geographical data gathered from smartphones. When a user installs an app, they are often asked to share their location data with the company providing the app and other companies who are partners with the app publisher. Users can opt into location sharing (or choose not to opt in). When they opt in, data is collected and shared with these companies.

Why use mobile location data insights?

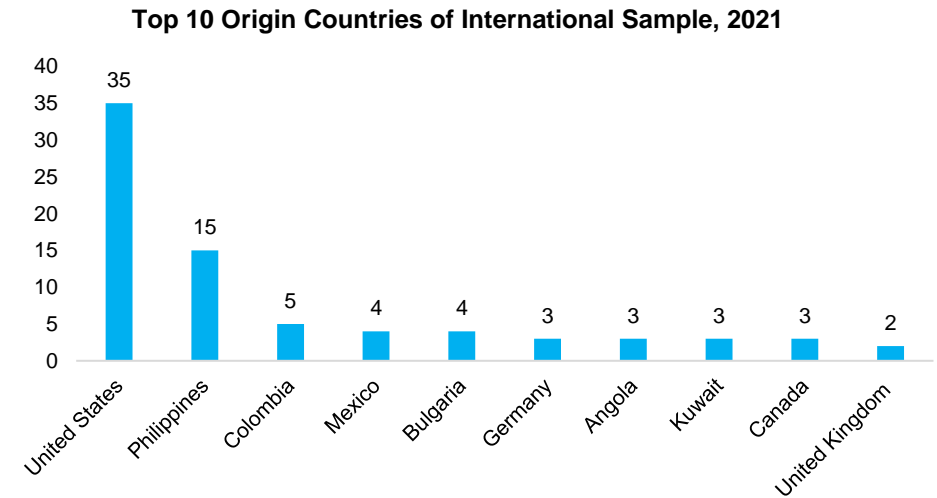
Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size. These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape's six regions.

Mobile location data serves as a sample. It 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 represent mobile location data from a sample size of **32 499 domestic** and **90 international** tourists who visited the Cape Karoo in 2021. Within the domestic data set, 7 449 tourists were from the City of Cape Town and from the sampled international tourists, 35 were from the USA.



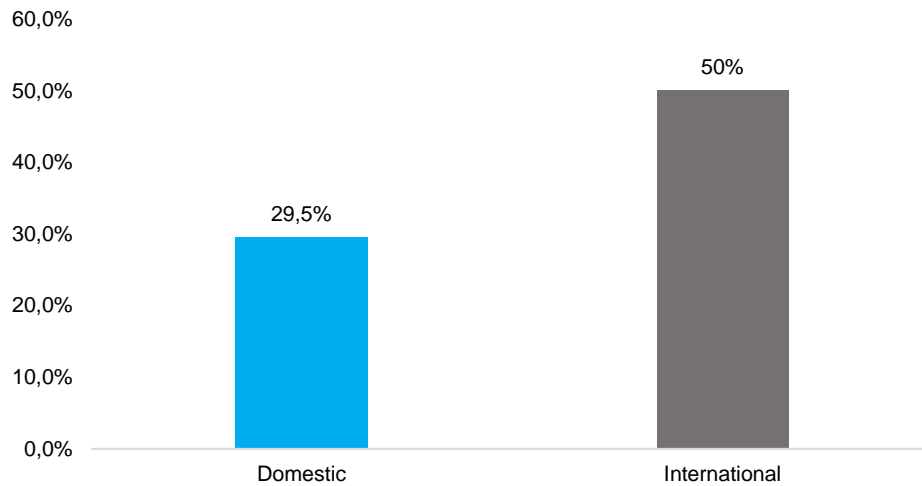
Source: Rove, 2022



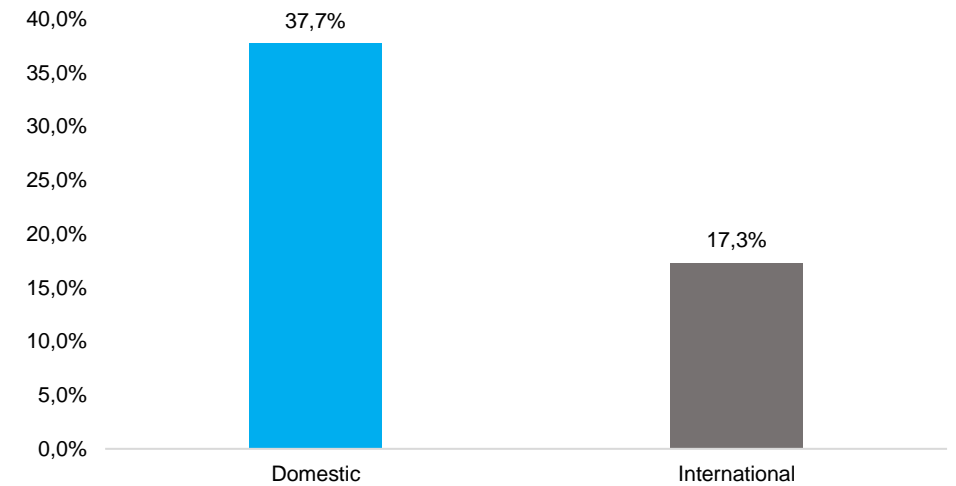
Cape Karoo Mobile Insights

- In 2021, 29.5% of domestic tourists and 50% of international tourists stayed overnight in the Cape Karoo. Repeat visitors accounted for 37.2% in the domestic and 17.3% from the international sample.

Percent Overnight Visitors in Cape Karoo, 2021



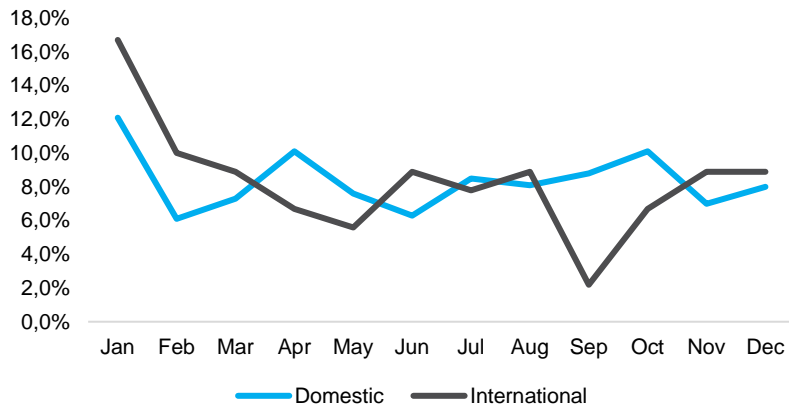
Percent Repeat Visitors in Cape Karoo, 2021



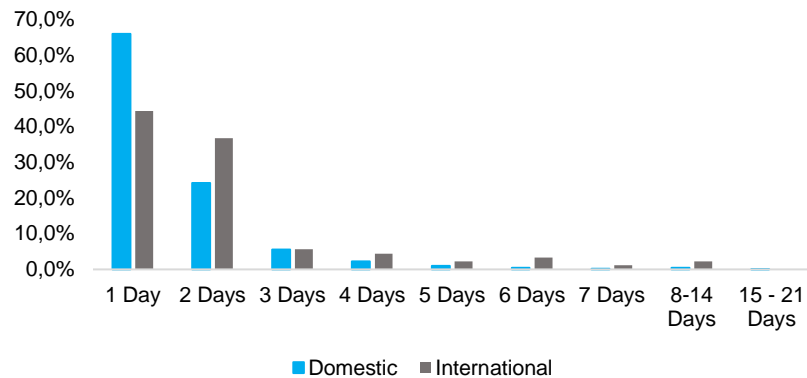
Cape Karoo Mobile Insights

- For domestic tourists, January was the most popular month to visit the Cape Karoo, this was followed by the months of April and October. January and February were the most popular months to visit for international tourists.
- August and September were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently at the beginning of the year (February and March).

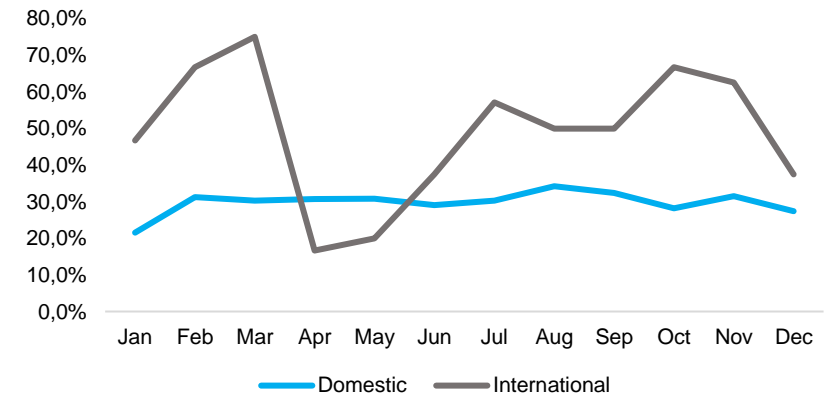
Popular Months in the Cape Karoo, 2021



Average Length of Stay (number of days) in the Cape Karoo, 2021



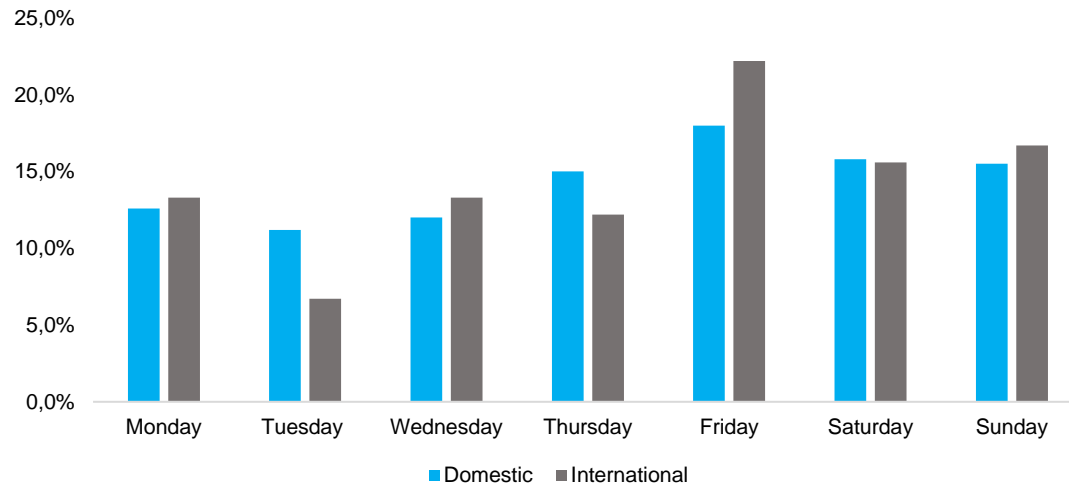
% of Sampled Tourists who stayed Overnight in the Cape Karoo, 2021



Cape Karoo Mobile Insights

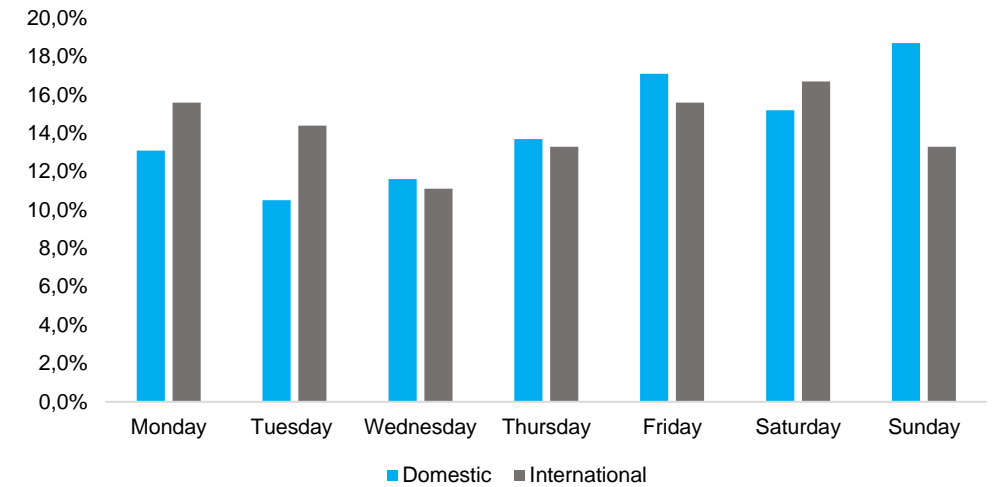
- Friday was the most popular arrival day for international tourists and Saturday was their most popular departure day.
- For domestic tourists, Fridays and Saturdays were their most popular arrival days and departure was most popular on a Sunday.

Popular Arrival Days of the Week in the Cape Karoo, 2021



Source: Rove, 2022

Popular Departure Days of the Week in the Cape Karoo, 2021

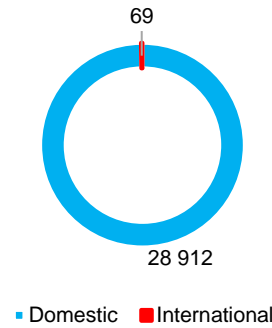


Source: Rove, 2022

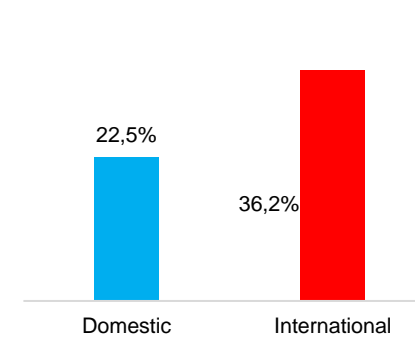
1.1 Beaufort West Visitor Trends

- Close to a quarter of sampled tourists who visited Beaufort West in 2021 stayed overnight. Among the international sample size 36.2% stayed overnight and 22.5% from the domestic sample. Repeat visitors accounted for 39,5% in domestic and 17,5% in the international categories.
- For domestic visitors, January was the most popular month to visit, followed by October and April. Whereas December, March and April ranked as the most popular months for international tourists.
- August and June were the most popular months for overnight stays among domestic tourists and international tourists stayed overnight most frequently in October and November.

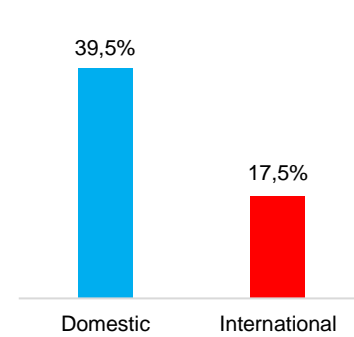
Sample Size, 2021



Overnight Visitors in Beaufort West, 2021



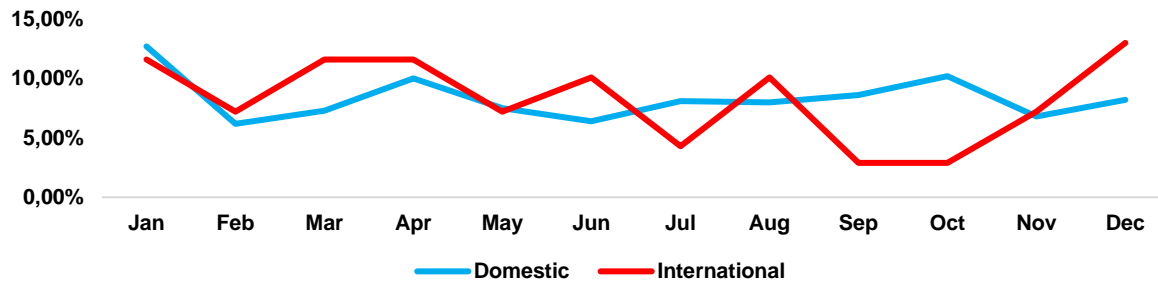
Repeat Visitors in Beaufort West, 2021



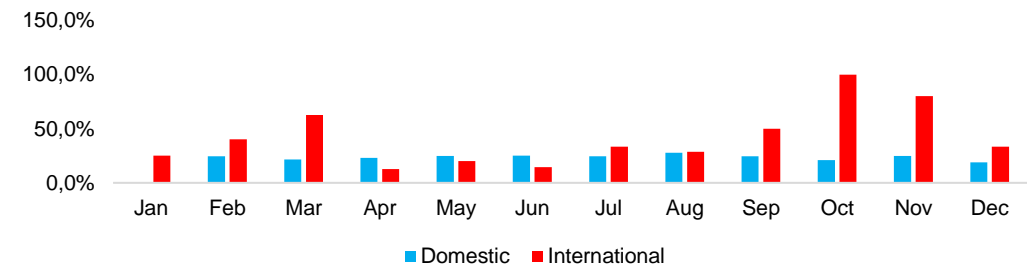
Average Length of Stay (number of days) in Beaufort West, 2021



Popular Months in Beaufort West, 2021



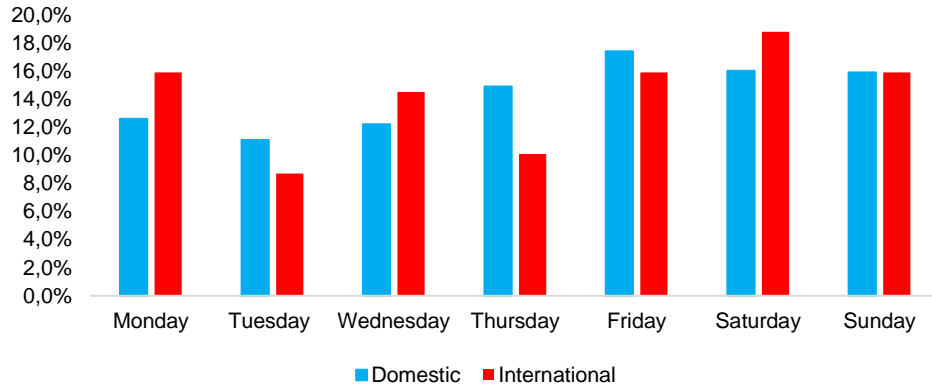
% of sampled tourists who stayed overnight in Beaufort West, 2021



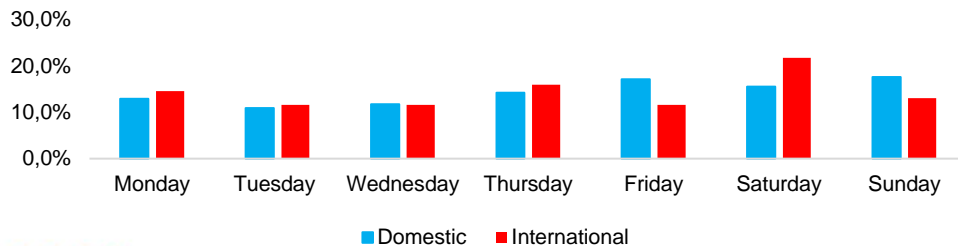
1.1 Beaufort West Visitor Trends

- Fridays, Saturdays and Sundays were the most popular arrival days for domestic visitors, and Sundays and Fridays were their most popular departure days.
- For international visitors, Saturday was the preferred arrival and departure day.

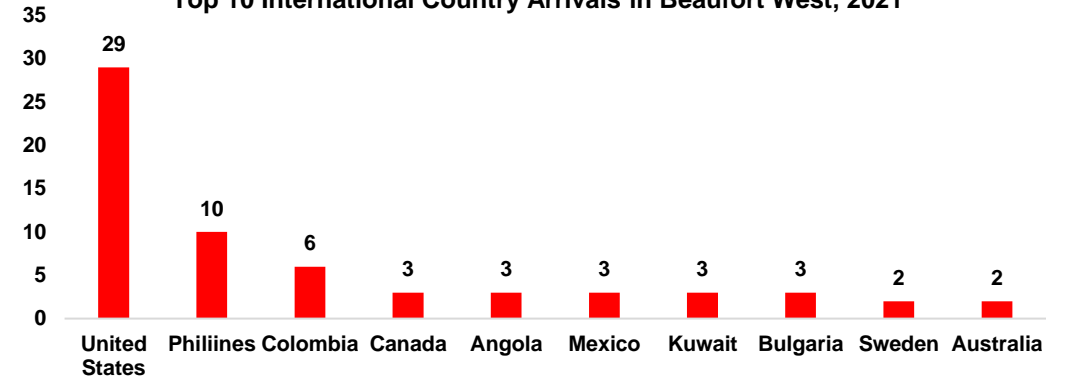
Popular Arrival Days of the Week in Beaufort West, 2021



Popular Departure Days of the Week in Beaufort West, 2021

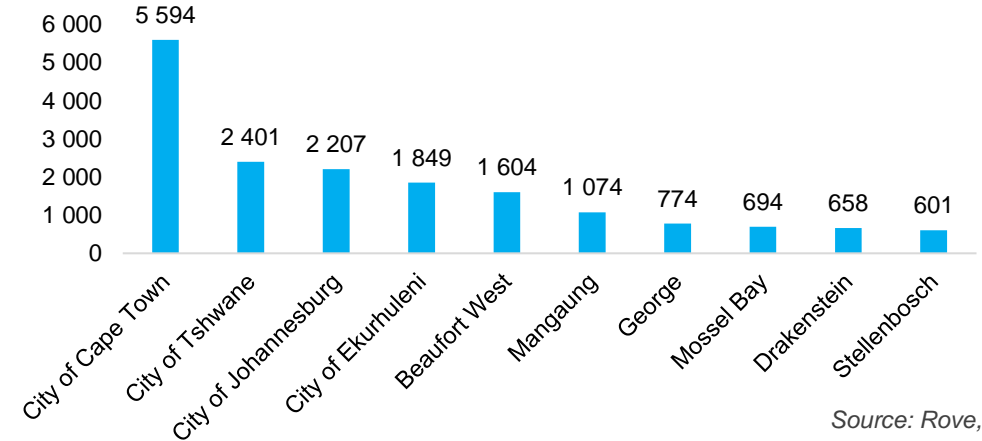


Top 10 International Country Arrivals in Beaufort West, 2021



Within the domestic data set, 5 594 tourists were from the City of Cape Town. On the international front, 29 were from the United States.

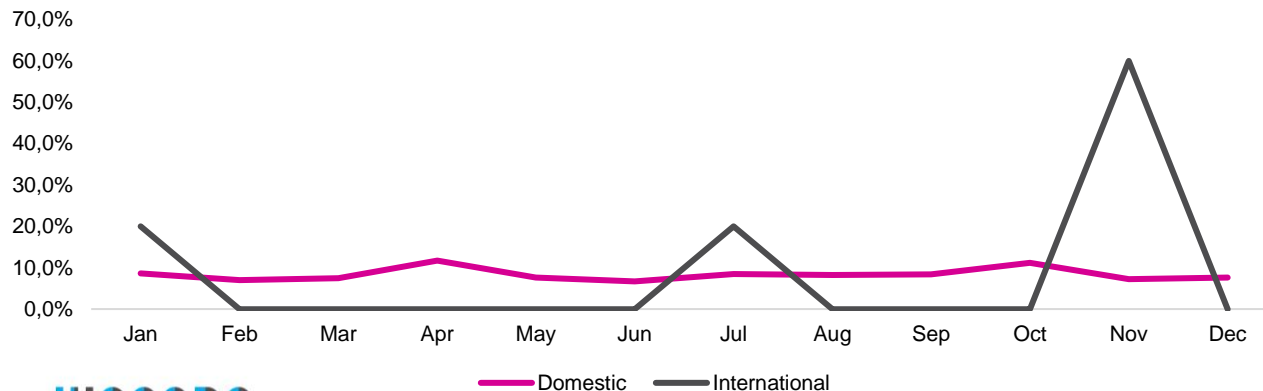
Top 10 Origin Municipalities of Domestic Sample in Beaufort West, 2021



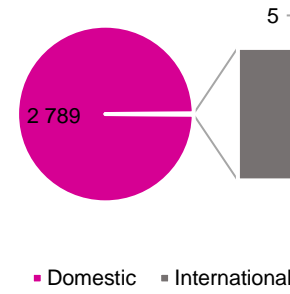
1.2 Laingsburg Visitor Trends

- From a sample of 2 794 tourists to Laingsburg, both domestic and international had a similar overnight average, at a rate of 25,4% for domestic tourists and 20% for the international market. Repeat visitors accounted for 15,6% in domestic, and 25% in the international category.
- For domestic tourists, April was the most popular month to visit, followed by October and January. International tourist visited the Cape Karoo in January, July and November 2021.
- December, May and November were the most popular months for overnight stays among domestic tourists and international tourists were only recorded in November.

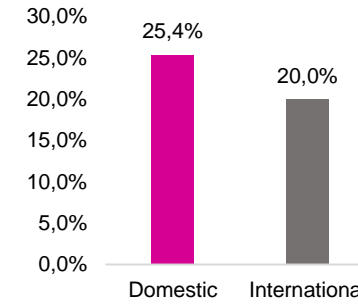
Popular Months in Laingsburg, 2021



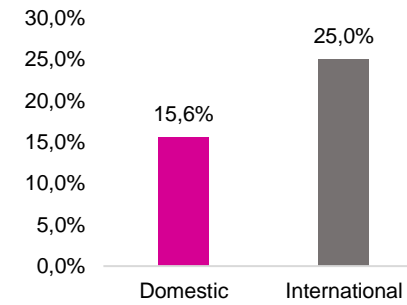
Sample Size, 2021



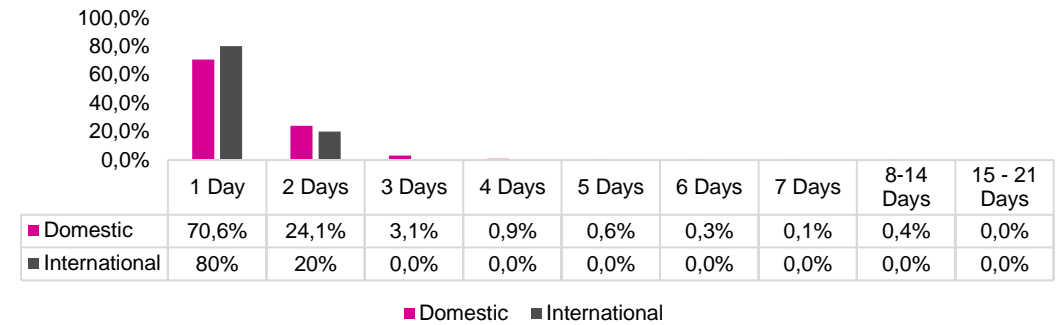
Overnight Visitors in Laingsburg, 2021



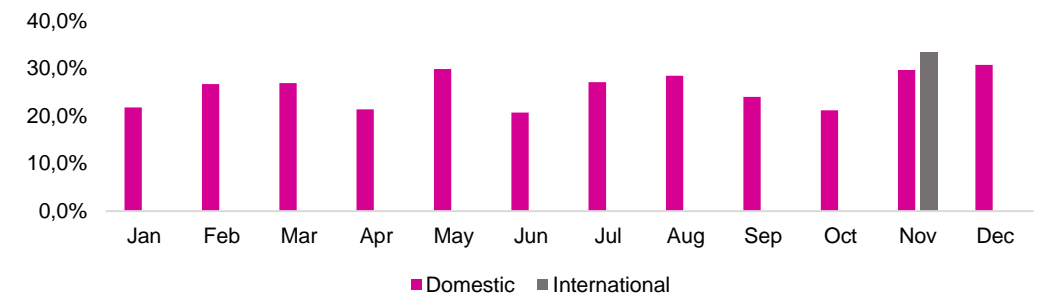
Repeat Visitors in Laingsburg, 2021



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



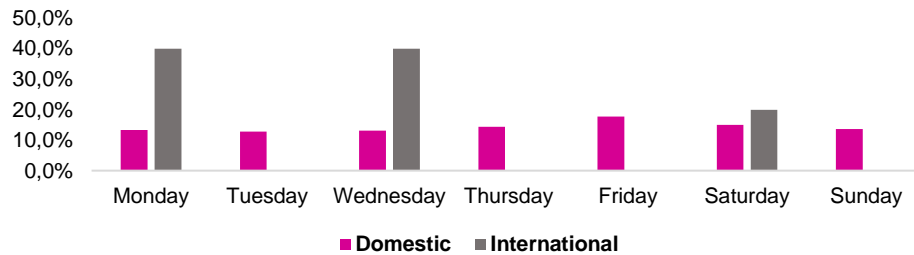
% of Sampled Tourists who stayed overnight in Laingsburg, 2021



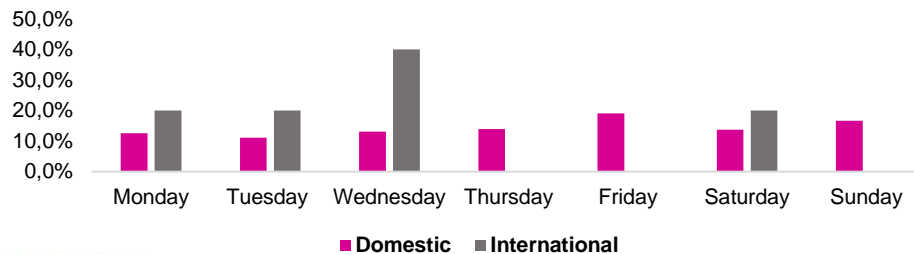
1.2 Laingsburg Visitor Trends

- The weekend days of (Friday, Saturday and Sunday) were the most popular arrival and departure days amongst domestic tourists in Laingsburg. While for international tourists, arrivals days were split between Mondays, Wednesdays and Fridays; and Wednesday was their most popular departure day.

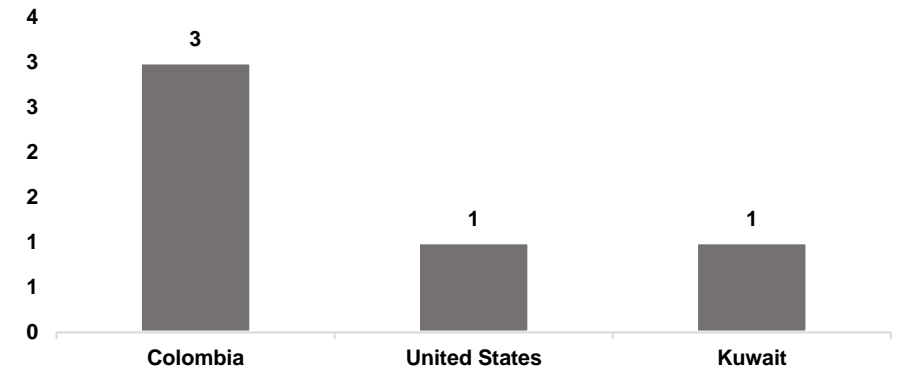
Popular Arrival Days of the Week in Laingsburg, 2021



Popular Departure Days of the Week in Laingsburg, 2021

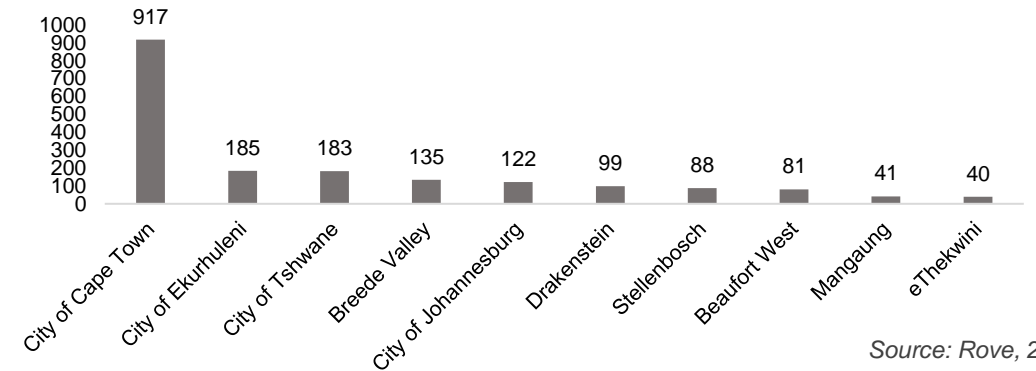


International Arrivals in Laingsburg, 2021



Within the domestic data set, 917 tourists were from the City of Cape Town and only 5 were international tourists.

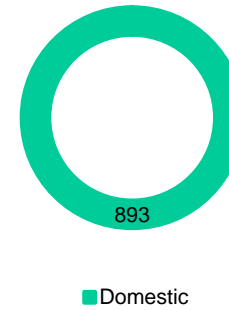
Top 10 Origin Municipalities of Domestic Sample Size in Laingsburg, 2021



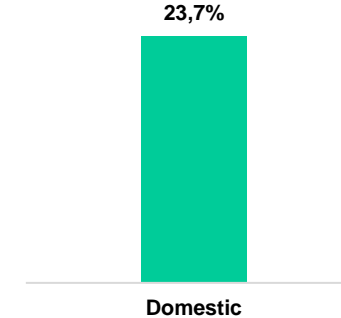
1.3 Matjiesfontein Visitor Trends

- There were 895 sampled tourist visits welcomed in Matjiesfontein in 2021, however only 2 were international tourists and as a result this sample was not included as it was too low to make relevant conclusions.
- From the domestic sample, only 23,7% stayed overnight and 7,7% of these tourists were repeat visitors. The tourists stayed for 1 or 2 days on average.
- April, September and January were the most popular months for domestic overnight visitors.

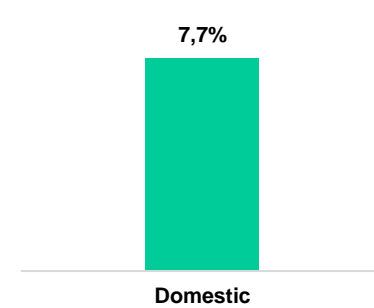
Sample Size, 2021



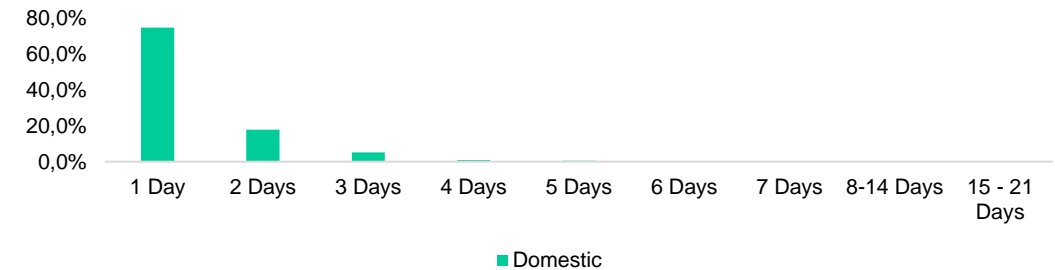
Overnight Visitors in Matjiesfontein, 2021



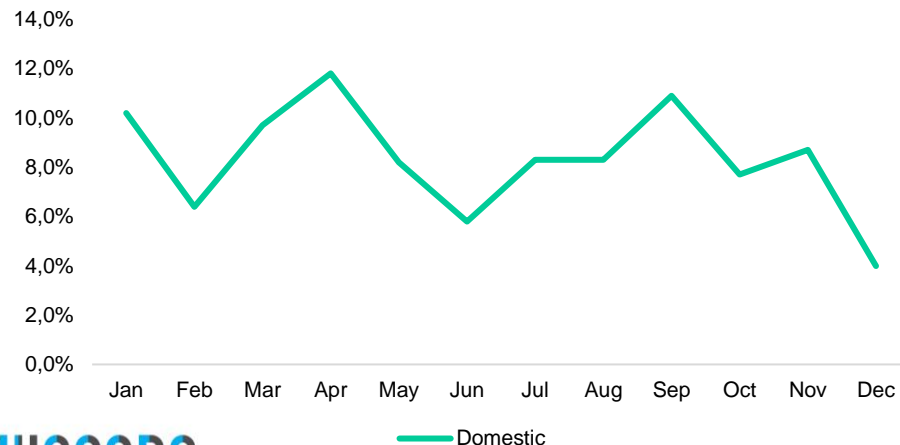
Repeat Visitors in Matjiesfontein, 2021



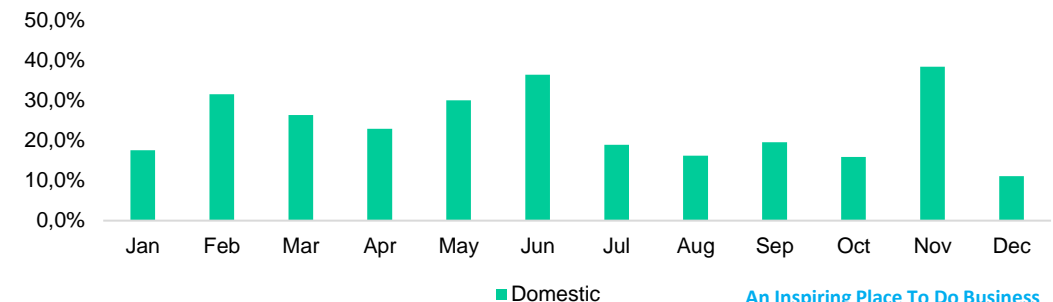
Average Length of Stay (number of days) in Matjiesfontein, 2021



Popular Months in Matjiesfontein, 2021



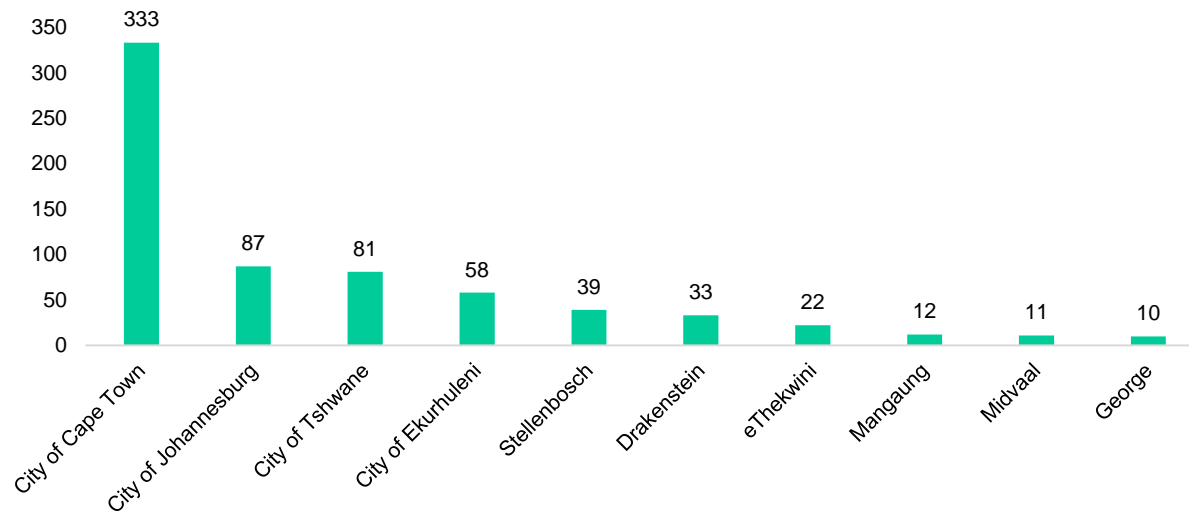
% of Sampled Tourists who stayed overnight in Matjiesfontein, 2021



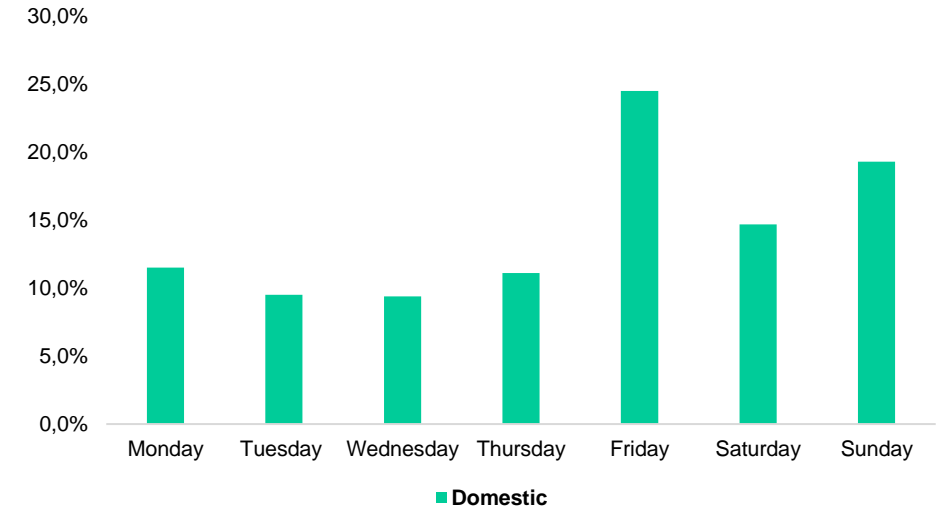
1.3 Matjiesfontein Visitor Trends

- From the findings, Fridays and Sundays were the most popular arrival days for domestic visitors and Sundays were their most popular departure day.
- Over 330 tourists originated from the City of Cape Town followed by the City of Johannesburg and City of Tshwane.

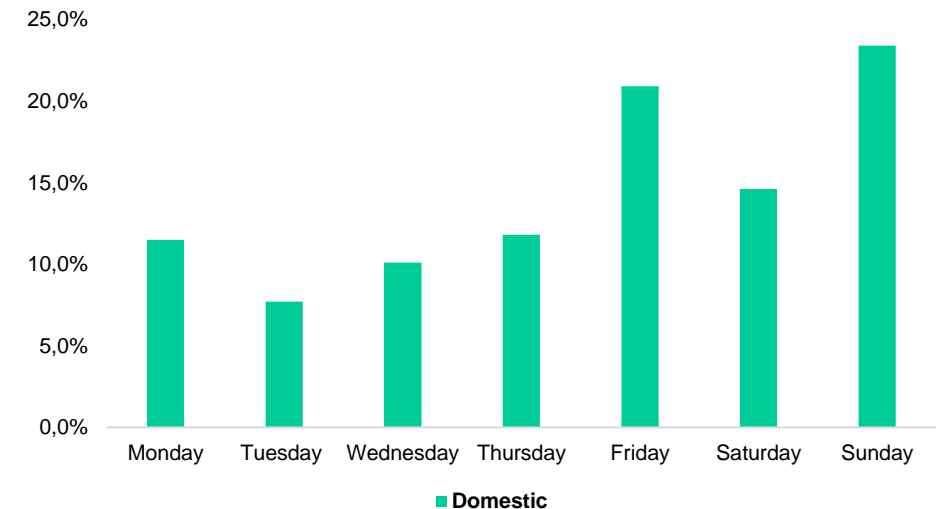
Top 10 Origin Municipalities of Domestic Sample Size in Matjiesfontein, 2021



Popular Arrival Days of the Week in Matjiesfontein, 2021

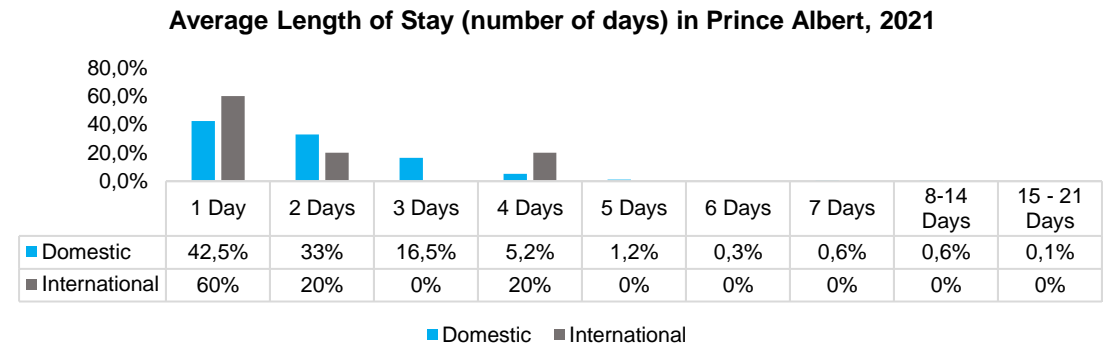
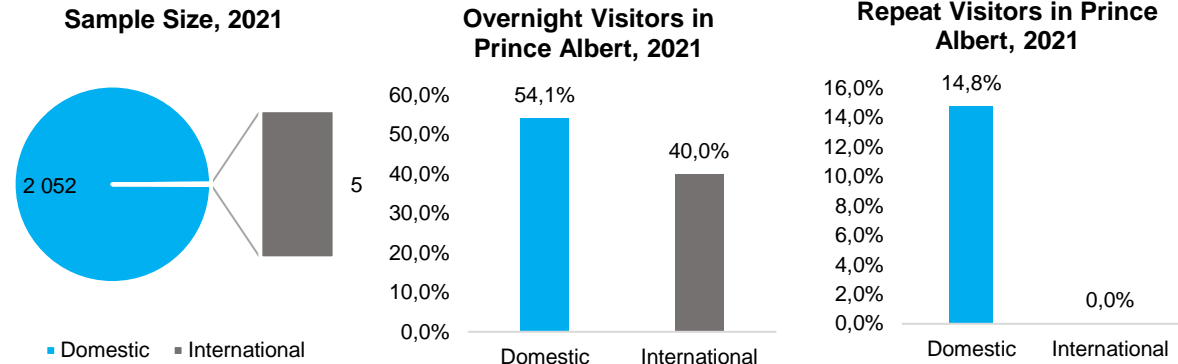


Popular Departure Days of the Week in Matjiesfontein, 2021

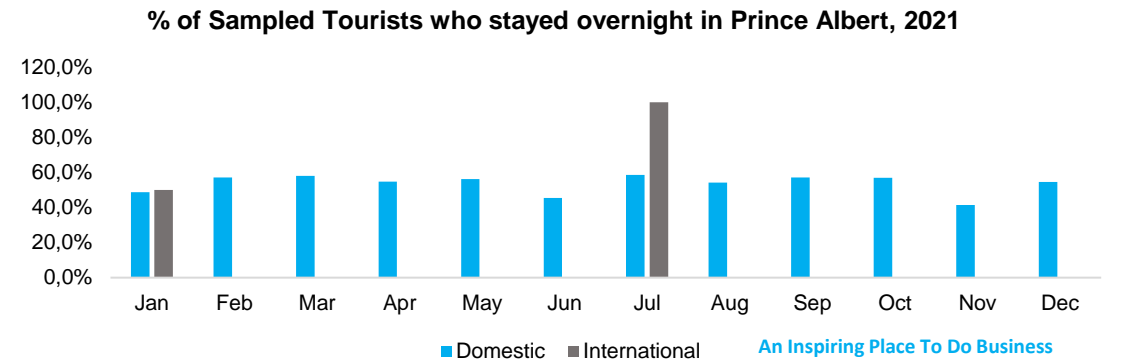
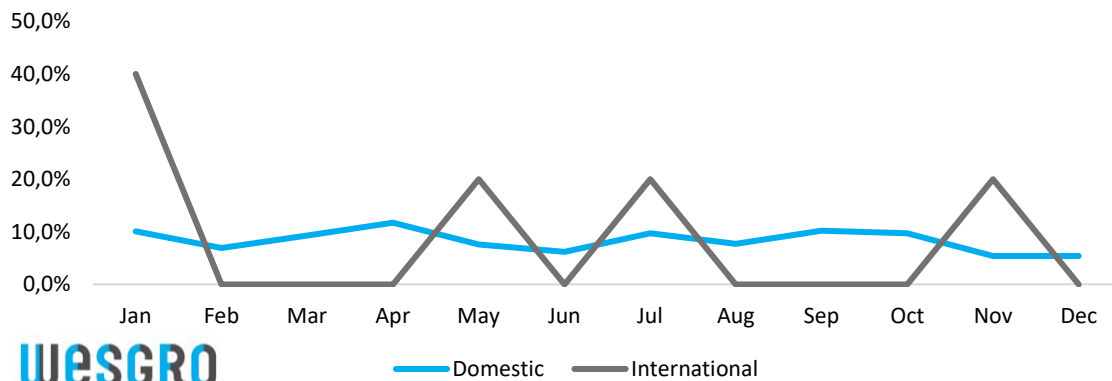


1.4 Prince Albert Visitor Trends

- From a sample of 2 057 tourists to Prince Albert, domestic visitors had a share of 54,1% and international had a 40% average for overnight stay. There were no international repeat visitors whereas domestic tourists accounted for 14,8%.
- For domestic tourists, April was the most popular month to visit, followed by September and January. International tourists visited the Cape Karoo in January followed by May, July and November, respectively.
- July, March and September were the most popular months for overnight stays among domestic tourists and international tourists were only recorded in January and July.



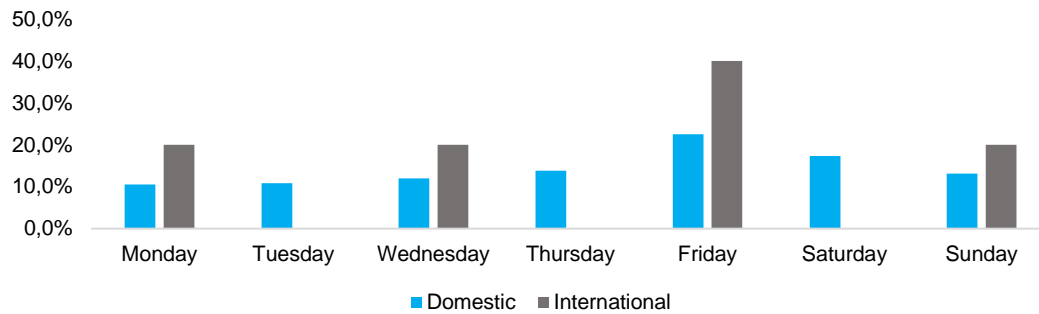
Popular Months in Prince Albert, 2021



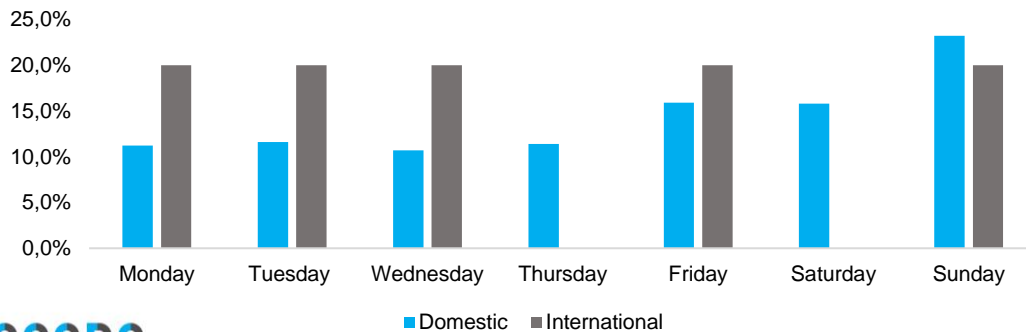
1.4 Prince Albert Visitor Trends

- Friday and Saturday were the most popular arrival days whereas Sunday, Friday and Saturday were the popular departure days amongst domestic tourists in Prince Albert. For international tourists, the most popular arrivals days were mostly seen on Fridays and departures were split between Monday, Tuesday, Wednesday, Friday and Sundays.

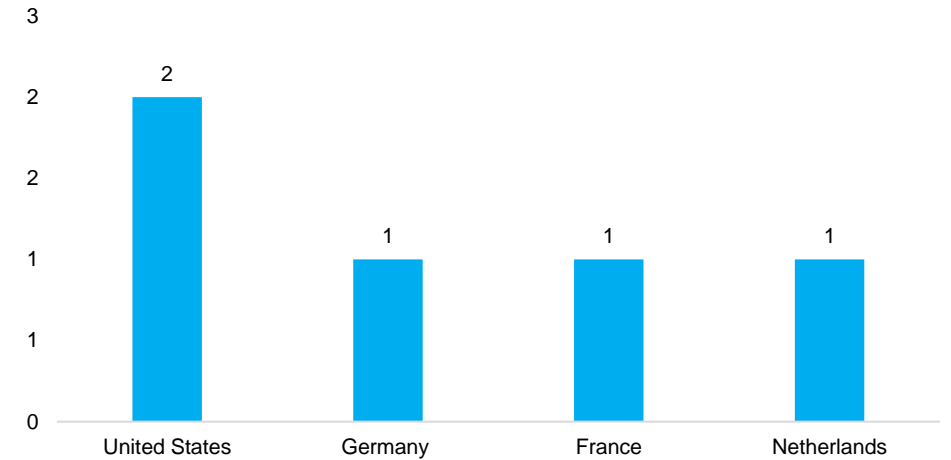
Popular Arrival Days of the Week in Prince Albert, 20221



Popular Departure Days of the Week in Prince Albert, 2021

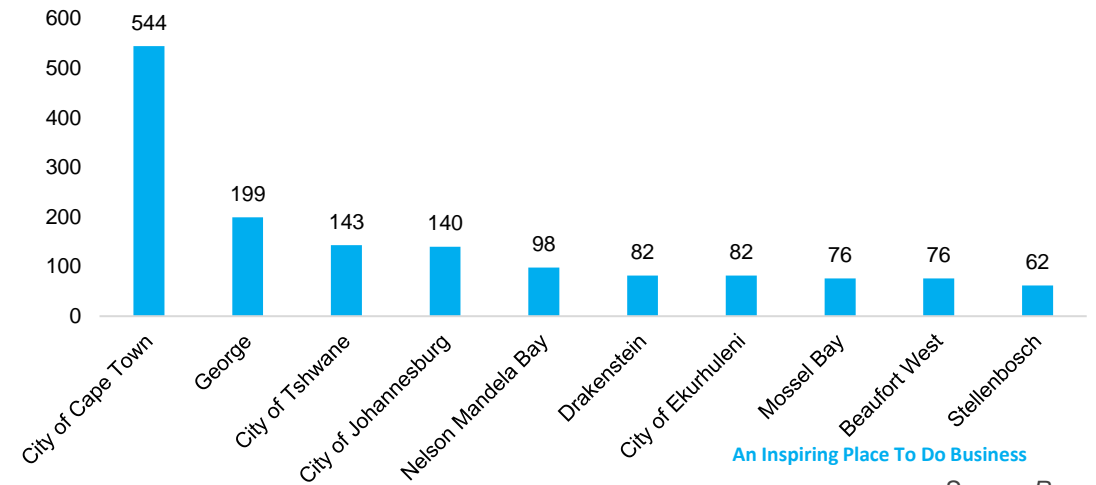


International Arrivals in Prince Albert, 2021



Within the domestic data set, 544 tourists were from the City of Cape Town and only 5 were international tourists.

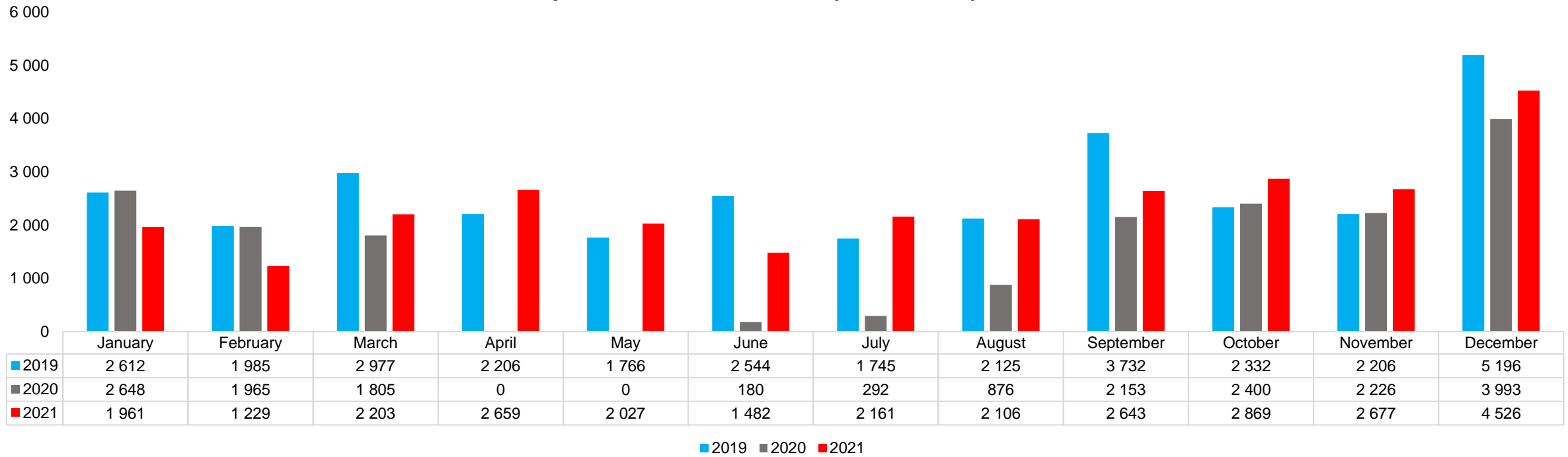
Top 10 Origin Municipalities of Domestic Sample Size in Prince Albert, 2021



2. CAPE KAROO NATIONAL PARK (2019 – 2021)

- Despite the impact of COVID-19 on tourism businesses and attractions, the Cape Karoo National Park received 18 538 visitors over the period January to December 2020. A 54% year-on-year increase in visitor numbers was seen in 2021 with 28 543 visitors entering the Cape Karoo National Park.

Cape Karoo National Park (2019 - 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.)

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. 		
Secondary Study Geography		Tourists are defined as:
City or Town	When a visitor does not live or work in the City or Town and they have traveled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as a tourist of the city Minimum distance traveled of 40km satisfies tourist definition for minimum distance traveled. Distance travelled is calculate d f rom the visitors Common Evening Location (latitude and longitude) to the center of the polygon 		
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 		

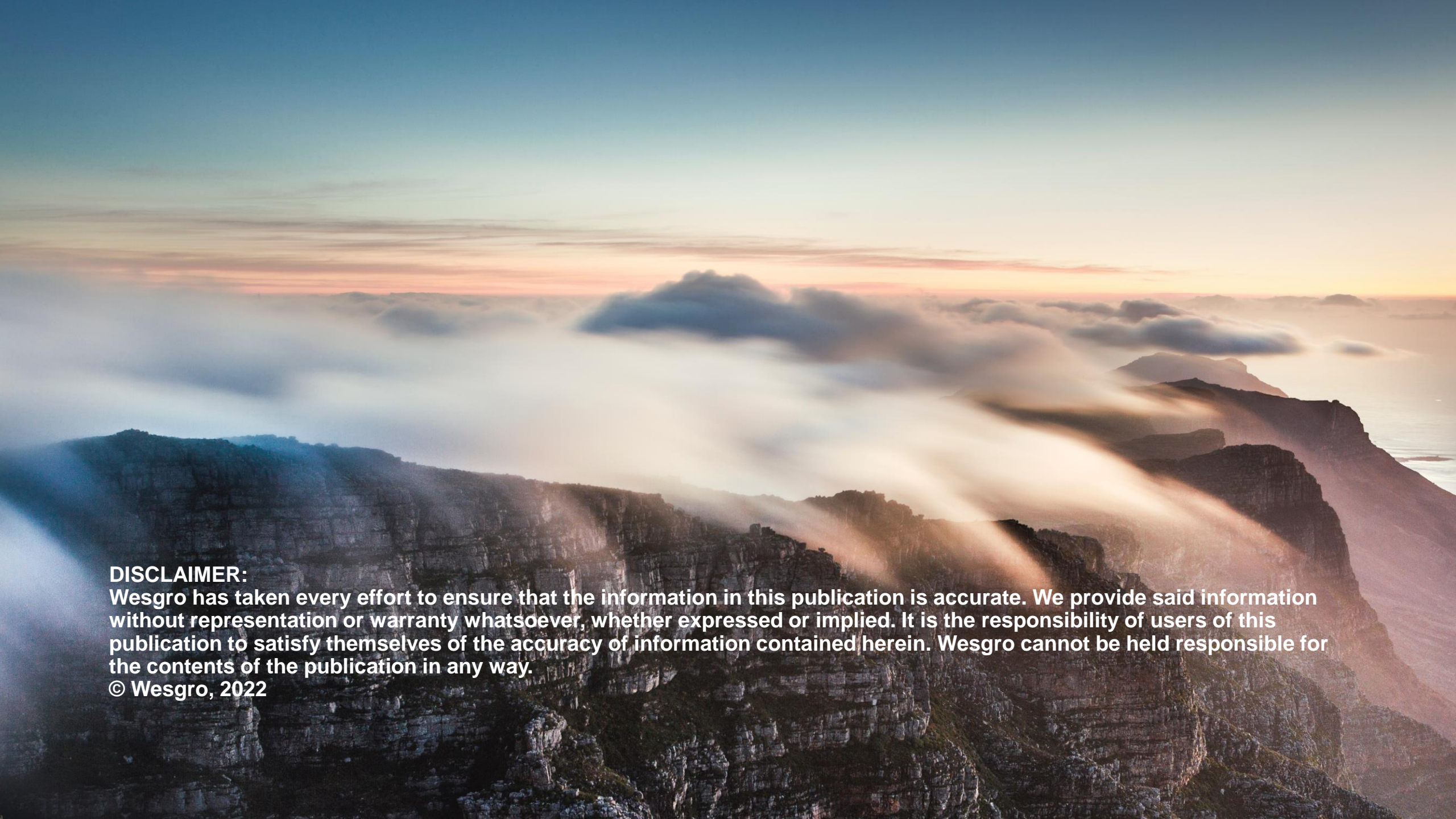
Glossary of Key Terms

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.

Source: Rove, 2022

3. List of Sources

- South African National Parks (SANParks)
- Rove Marketing powered by Near



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