

Cape Karoo Visitor Trends Jan-Dec 2022

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tourism, trade, investment, film

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Cape Karoo Visitor Trends

Mobile Location Data Insights

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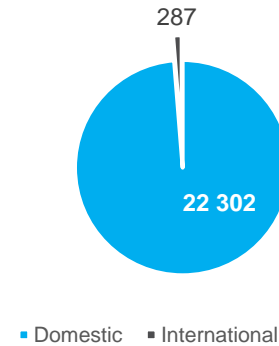
1. Cape Karoo Mobile Location Data Insights

- 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.

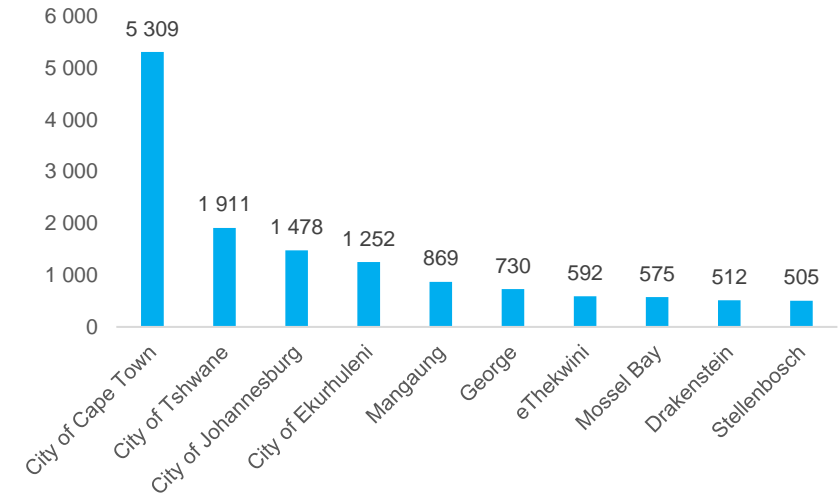
The insights in this report represents mobile location data from a sample of **22 302 domestic** and **287 international** tourists who visited the Cape Karoo in 2022.

Within the domestic data set, over **5,000** of the sampled tourists were from the City of Cape Town and from the international sampled tourists, **73** were from the USA, followed by India (**49**).

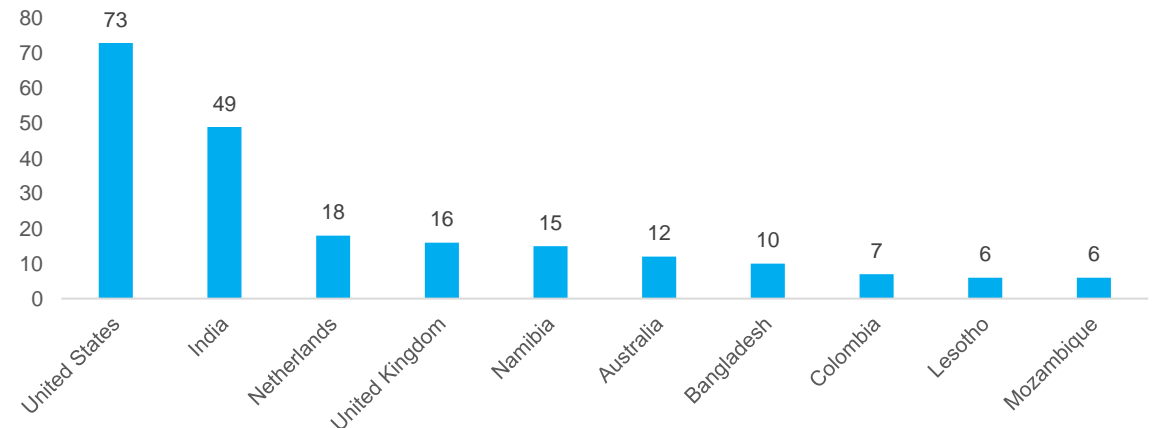
Sample Size (2022)



Top 10 Origin Municipalities in the Cape Karoo (2022)



Top 10 International Source Markets in the Cape Karoo (2022)



1.1. Mobile Insights: Cape Karoo Trends

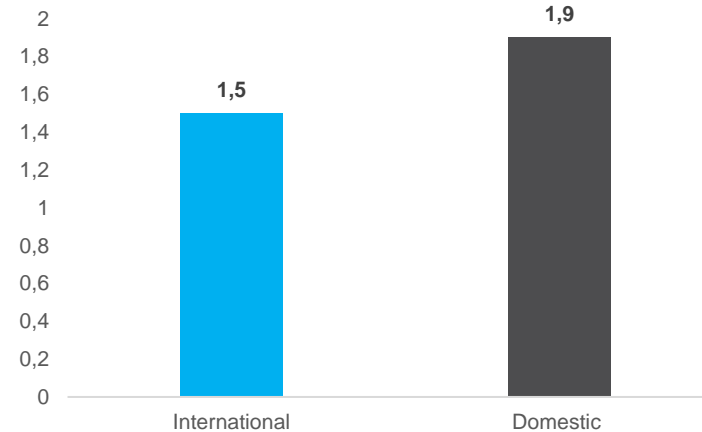
- On average, international visitors spent 1,5 days in the Cape Karoo, while the domestic market held an average of 1,9 days.
- Over 70% of tourists to the Cape Karoo stayed overnight in the region. 44,9% of the sampled tourists were international, while 27,0% were from the domestic market.

An overnight stay is defined as tourists that arrived prior to midnight and stayed until 07:00 the following day.

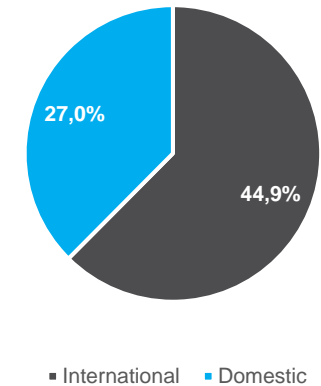
- Close to 50% of international tourists to the Cape Karoo were repeat visitors.

A repeat visitor is defined as one who visited the region more than once within the review period.

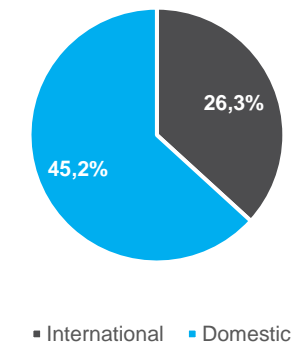
Average Length of Stay in the Cape Karoo, 2022



Overnight Stays in the Cape Karoo (2022)



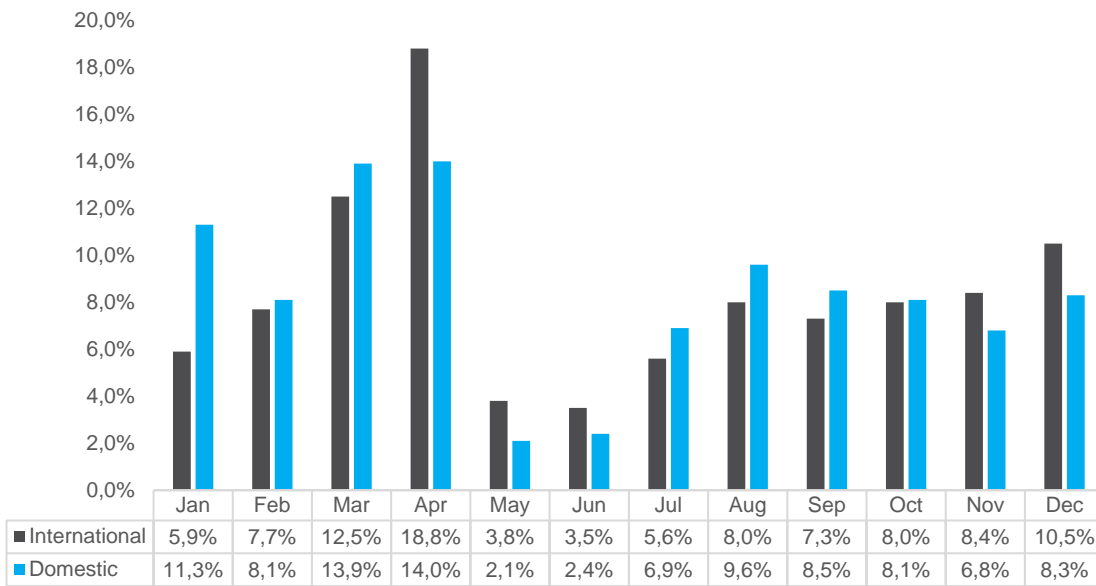
Percent Repeat Visitors in the Cape Karoo (2022)



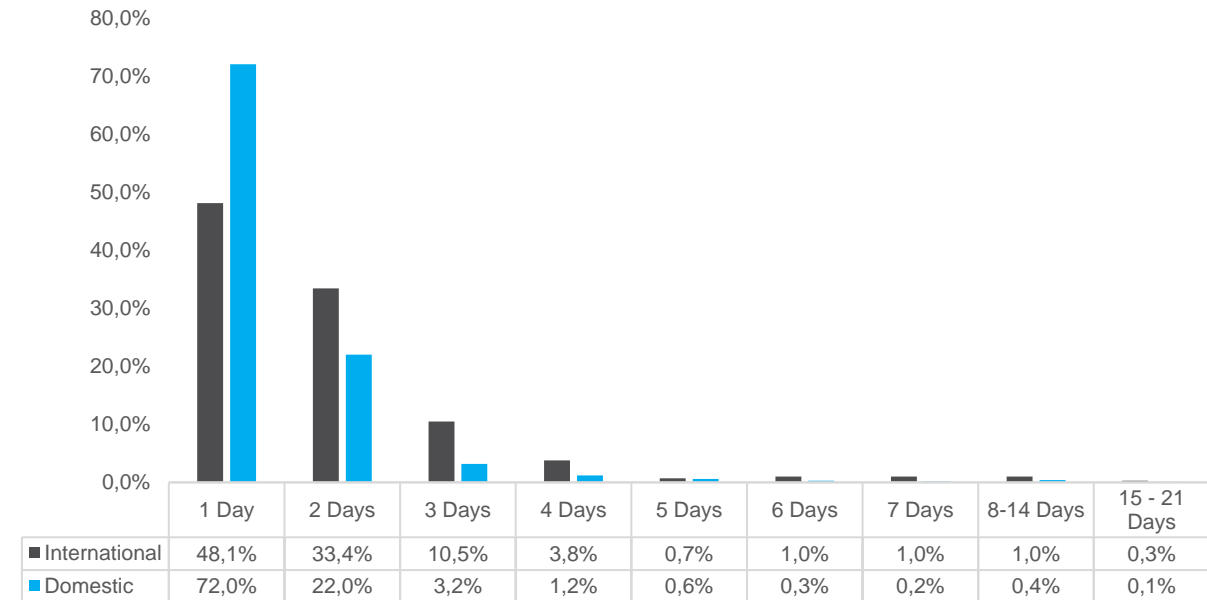
1.1. Mobile Insights: Cape Karoo Trends

- The most popular months for travel in the Cape Karoo in 2022 from the international market was April (18,8%) and March (12,5%), this was the same for the domestic market with 14,0% for April and 13,9% recorded for March.
- Both international and domestic tourists spent between 1 – 2 days in the Cape Karoo.

Popular Months for Travel in the Cape Karoo (2022)



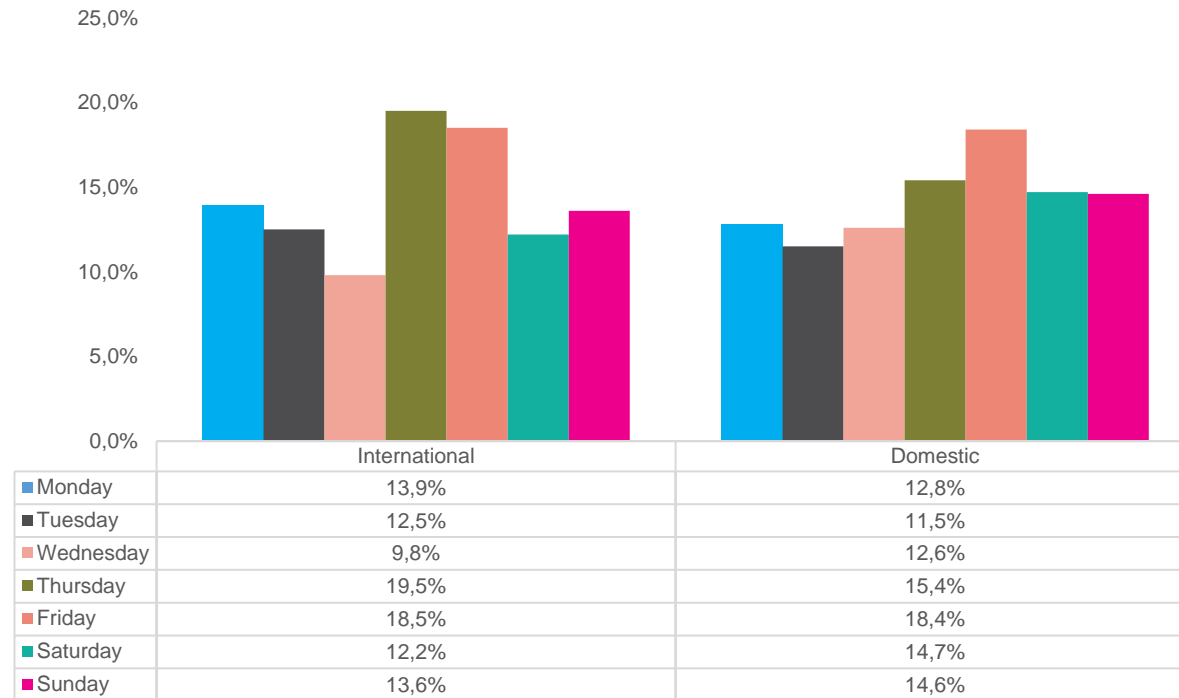
Average Length of stay (number of days) in the Cape Karoo (2022)



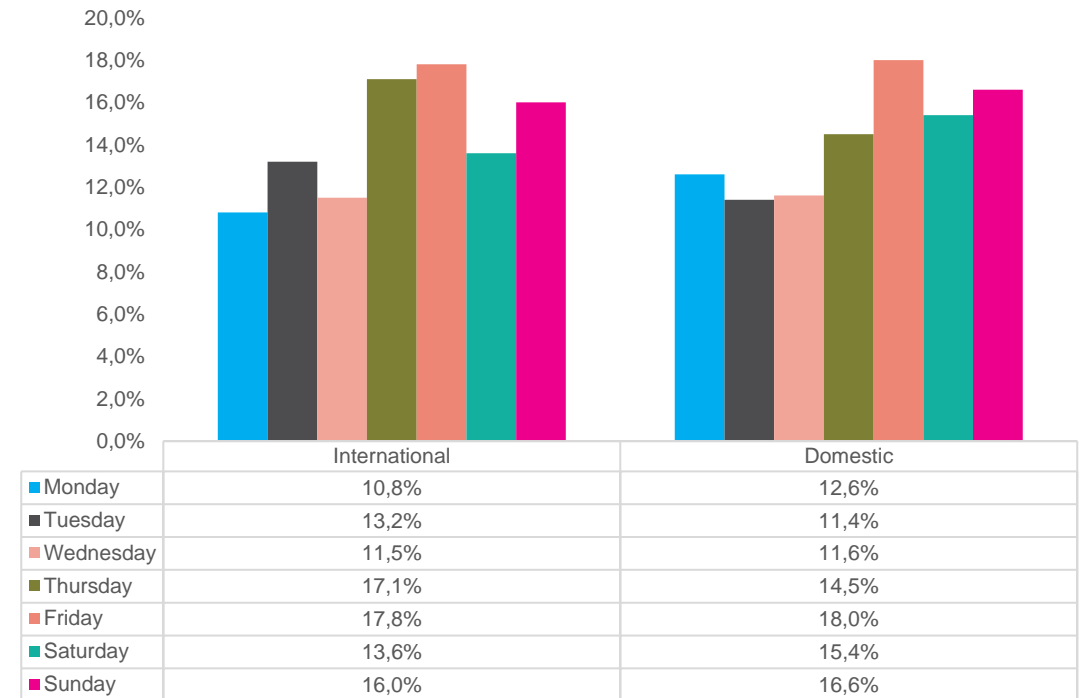
1.1. Mobile Insights: Cape Karoo Trends

- Domestic visitors to the Cape Karoo were most likely to arrive on a Friday (18,4%) or Thursday (15,4%) as well as depart on either of those two days as indicated below.
- For international visitors, both arrival and departure days were most common on Fridays and Thursdays.

Popular Arrival Days of the Week in the Cape Karoo (2022)



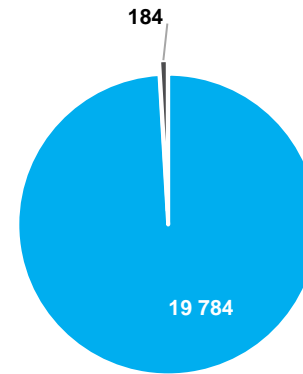
Popular Departure Days of the Week in the Cape Karoo (2022)



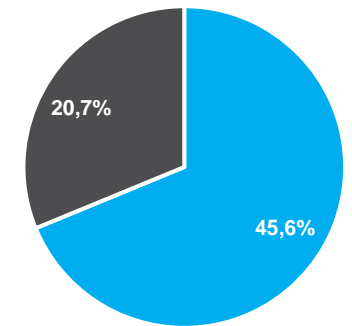
1.2. Mobile Insights: Beaufort West Visitor Trends

- A sample of 19,784 domestic and 184 international tourists visited Beaufort West in 2022.
- 38,6% of overnight stays in Beaufort West was from the domestic market while 20% were international tourists. Repeat visitors accounted for 66,3% when combined for both domestic and international tourists.
- While most visitors to the town were day visitors, an average length of stay of 1,4 nights were recorded for domestic tourists and 1,9 nights for the international market.

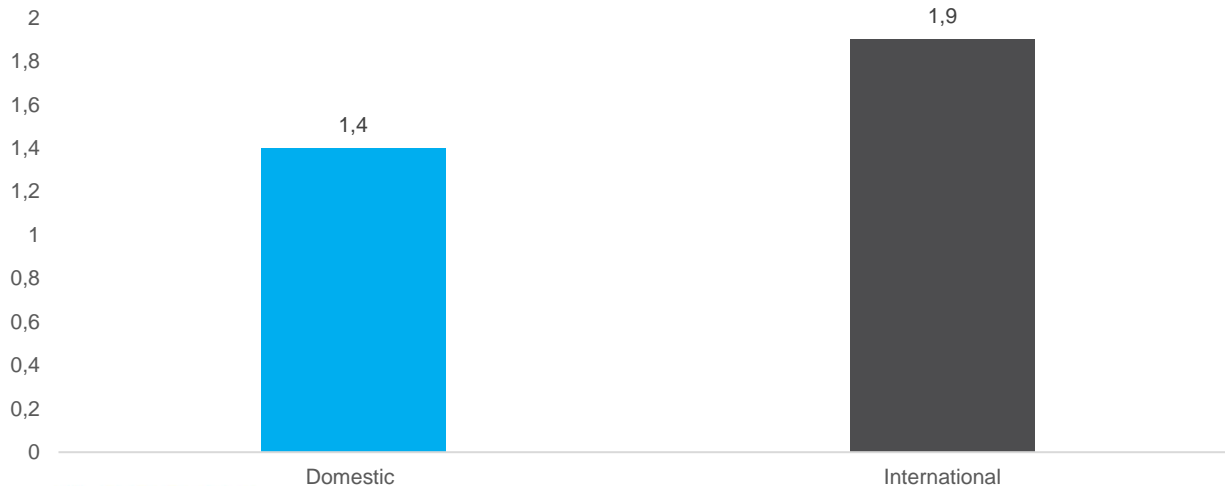
Beaufort West Sample Size, 2022



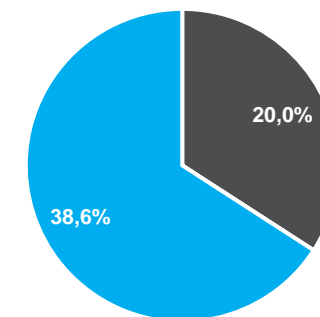
Percent Repeat Visitors in Beaufort West, 2022



Average Length of Stay in Beaufort West, 2022



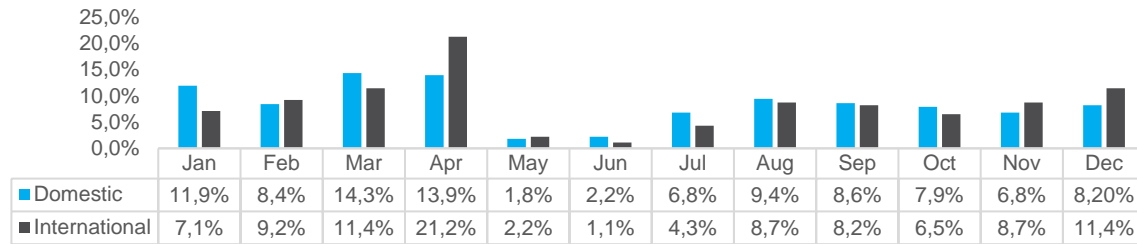
Overnight Stays in Beaufort West, 2022



1.2. Mobile Insights: Beaufort West Visitor Trends

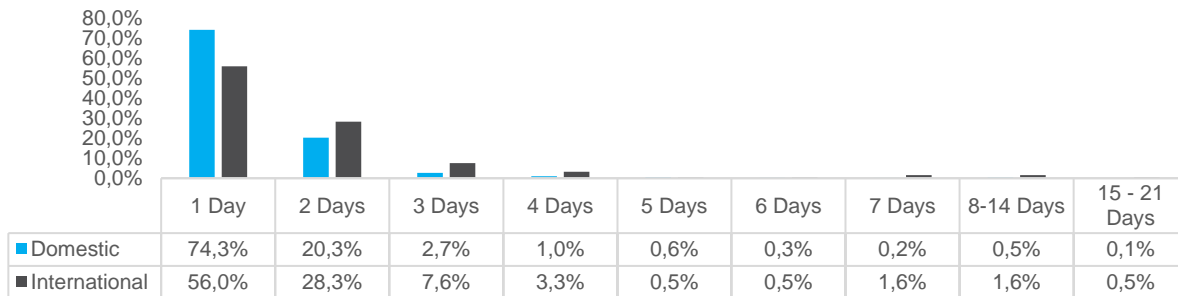
- Beaufort West recorded the highest share of tourists amongst the selected Cape Karoo towns.
- For domestic tourists, March was the most popular month to visit, followed by April, this was the same for international tourists as well.
- The average length of stay for tourists to Beaufort West for both domestic and international was between 1 – 3 days.

Popular Months for Travel in Beaufort West, 2022



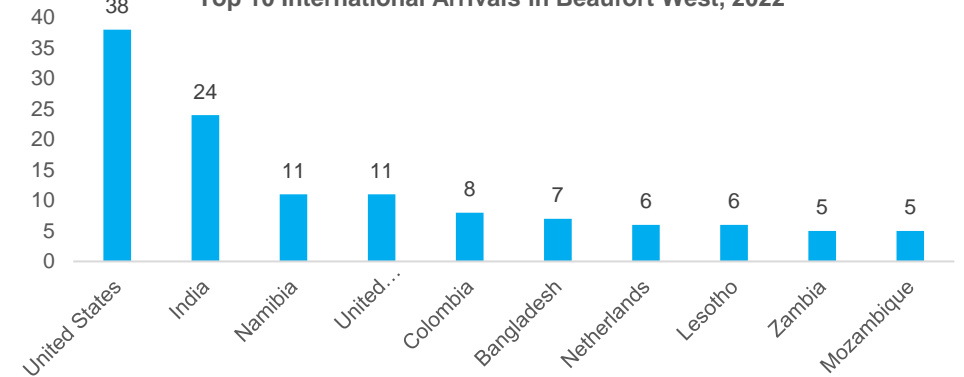
■ Domestic ■ International

Average Length of stay (number of days) in Beaufort West, 2022



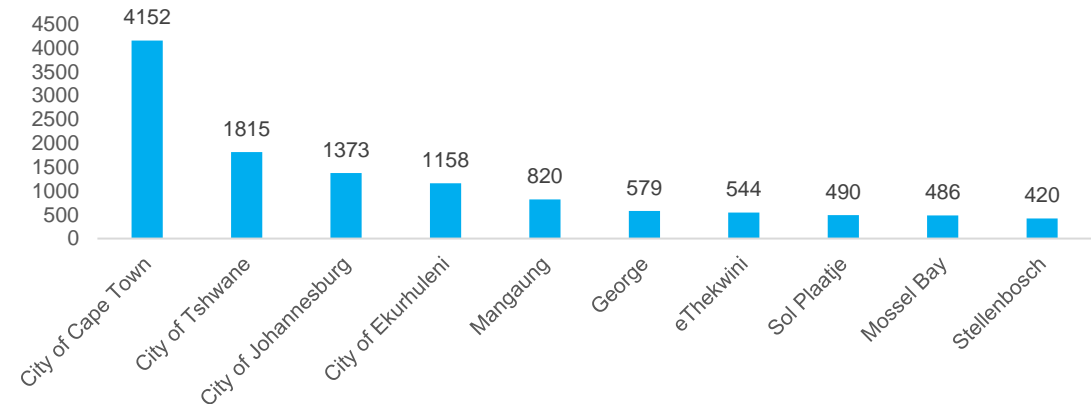
■ Domestic ■ International

Top 10 International Arrivals in Beaufort West, 2022



- Within the domestic data set, (4,152) tourists were from the City of Cape Town and for international arrivals, the USA (38) had the highest share of tourists.

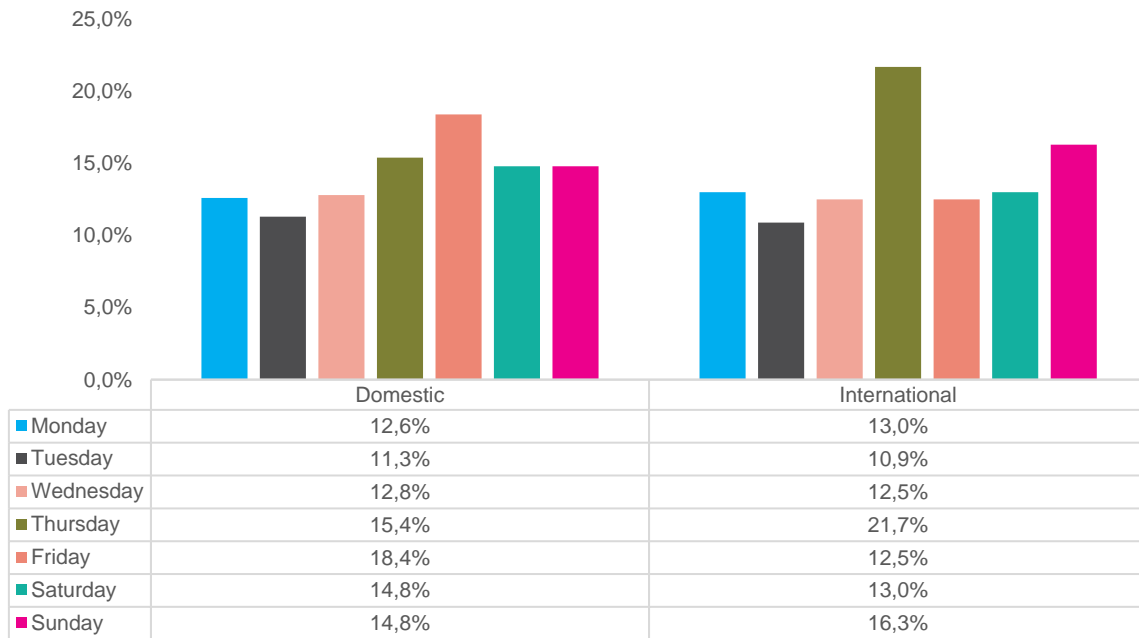
Top 10 Origin Municipalities of Domestic Sample in Beaufort West, 2022



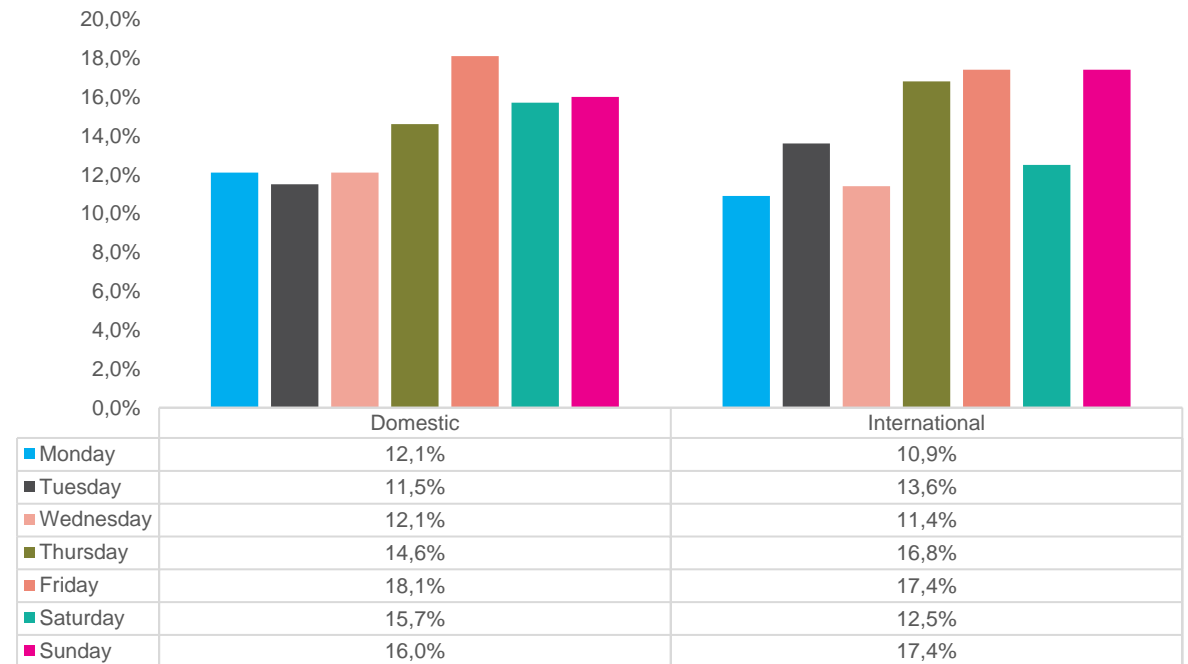
1.2. Mobile Insights: Beaufort West Visitor Trends

- Fridays and Thursdays were the most popular arrival days for domestic visitors. Friday also forms part of their popular departure days as well and Sundays.
- For international visitors, Thursdays and Sundays were their most popular arrival days and Fridays and Sundays their popular departure days.

Popular Arrival Days of the Week in Beaufort West, 2022



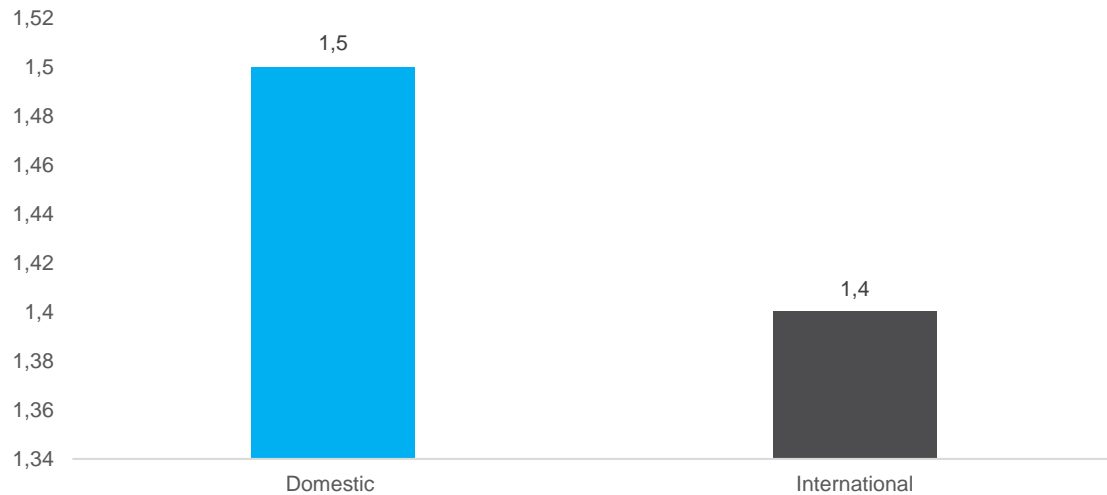
Popular Departure Days of the Week in Beaufort West, 2022



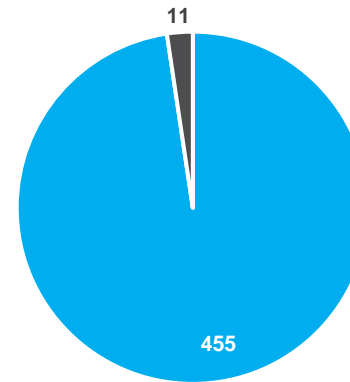
1.3. Mobile Insights: Matjiesfontein Visitor Trends

- Close to 500 domestic tourists visited Matjiesfontein in 2022 with only 11 recorded from the international market. Repeat visitors accounted for 13,3% in domestic tourists and 10% from the international market.
- Most visitors to the town were day visitors, with an average of 1,5 for domestic and 1,4 for international. Overnight stays were higher for domestic visitors with 34,5% recorded as compared to 27,3% from the international market.

Average Length of Stay in Matjiesfontein, 2022

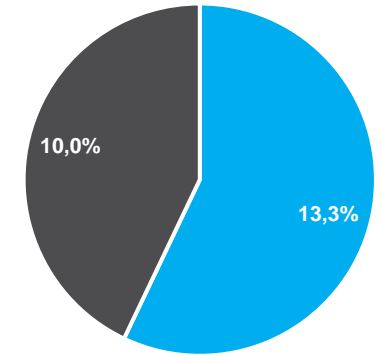


Matjiesfontein Sample Size, 2022



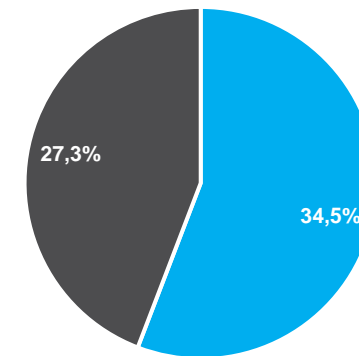
■ Domestic ■ International

Percent Repeat Visitors in Matjiesfontein, 2022



■ Domestic ■ International

Overnight Stays in Matjiesfontein, 2022

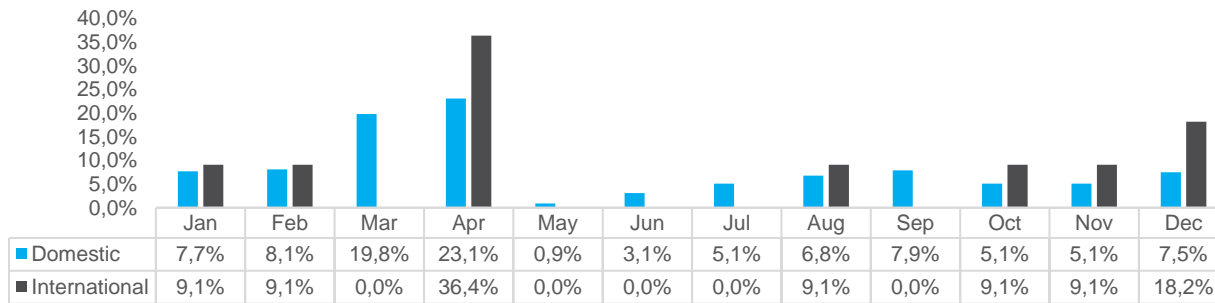


■ Domestic ■ International

1.3. Mobile Insights: Matjiesfontein Visitor Trends

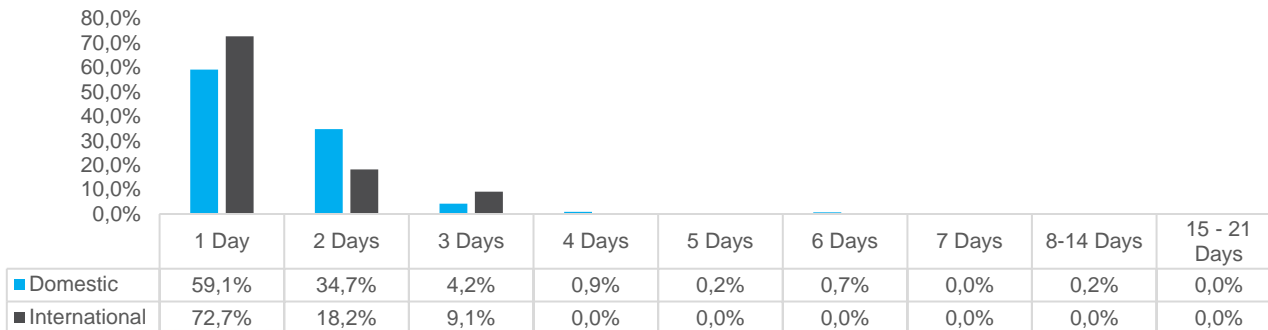
- For domestic visitors, April was the most popular month to visit, followed by March, with April and December being the popular months for international visitors.
- The average length of stay for visitors to Matjiesfontein for both domestic and international travellers was between 1 – 3 days.

Popular Months for Travel in Matjiesfontein, 2022



■ Domestic ■ International

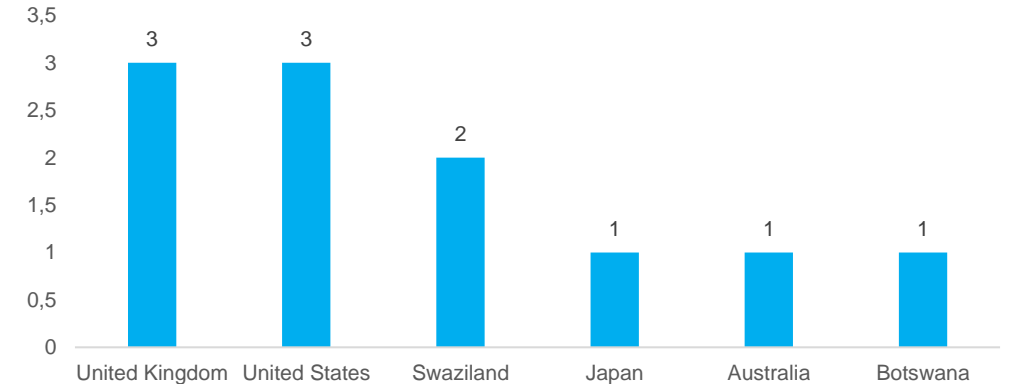
Average Length of Stay (number of days) in Matjiesfontein, 2022



■ Domestic ■ International

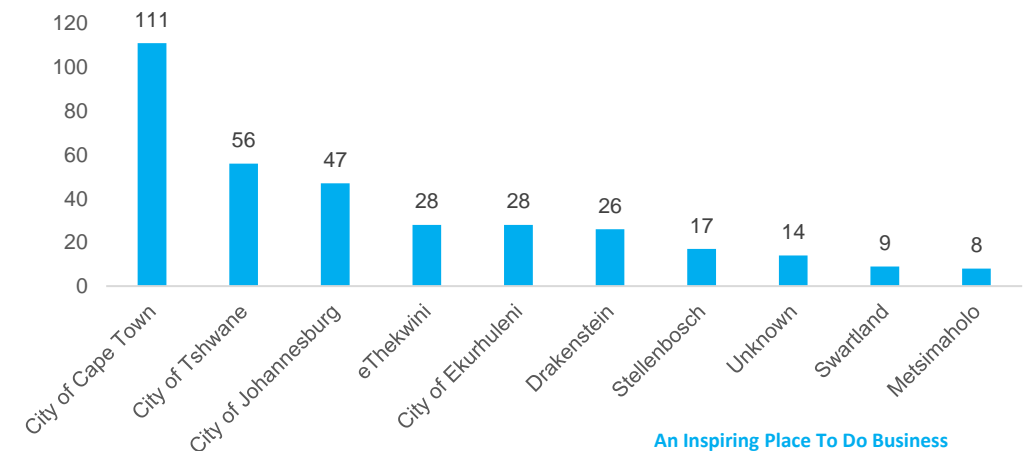


International Arrivals in Matjiesfontein, 2022



- Within the domestic data set, 111 tourists were from the City of Cape Town followed by the City of Tshwane (56) and City of Johannesburg (47). International arrivals only accounted for 11 arrivals.

Top 10 Origin Municipalities in Matjiesfontein, 2022

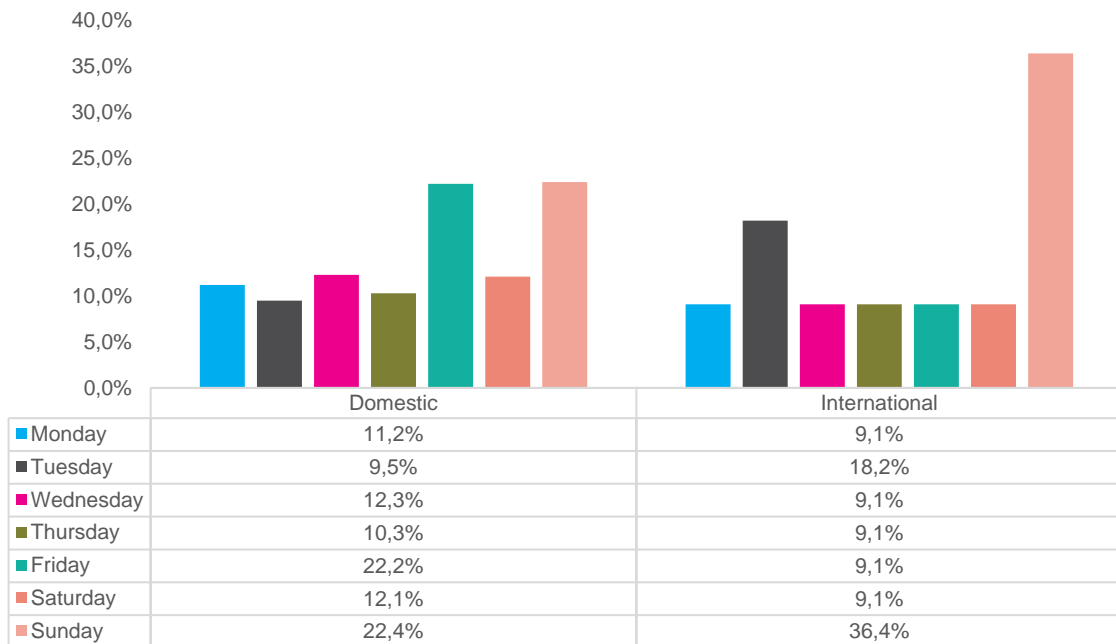


An Inspiring Place To Do Business

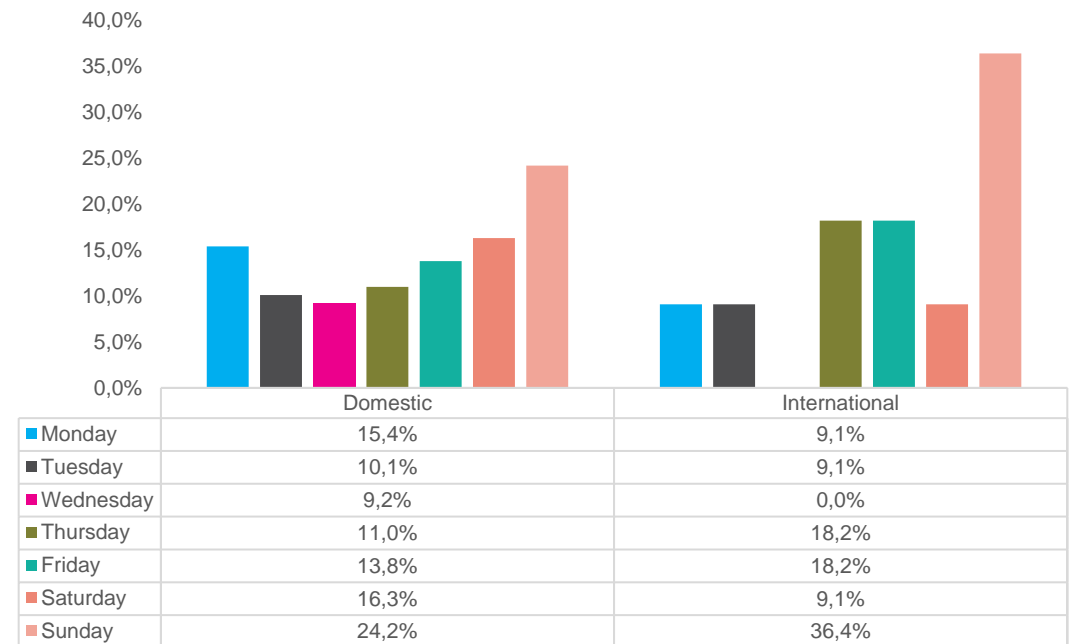
1.3. Mobile Insights: Matjiesfontein Visitor Trends

- Fridays and Sundays were the most popular arrival days for domestic visitors in Matjiesfontein. While Saturday and Sundays were their most common departure days.
- For international visitors, Sunday was their most common day of arrival while Thursday, Friday and Sunday were their popular departure days.

Popular Arrival Days of the Week in Matjiesfontein, 2022



Popular Departure Days of the Week in Matjiesfontein, 2022

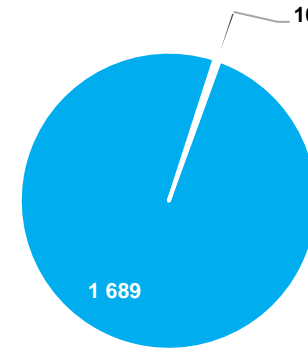


Source: Rove, 2023

1.4. Mobile Insights: Laingsburg Visitor Trends

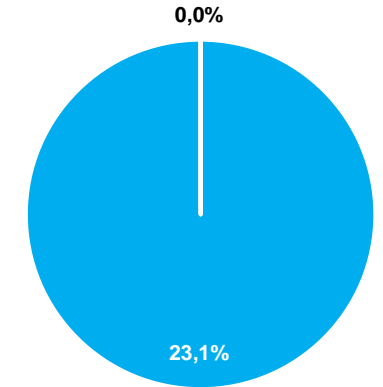
- A sample of 1,689 domestic and 10 international tourists visited Laingsburg in 2022.
- Close to 25% of domestic and 20% of international tourists stayed overnight in Laingsburg for the year. Repeat visitors accounted for 23,1% in the domestic category while there were none in the international category.
- Most visitors to the town were day visitors, with an average of 1,4 for domestic and 1,2 for international.

Laingsburg Sample Size, 2022



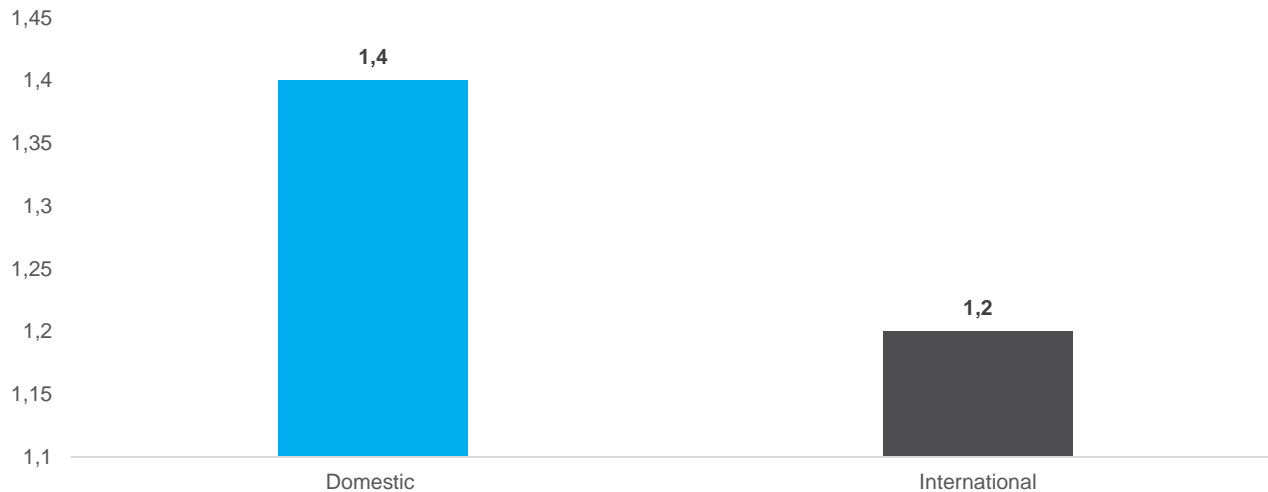
■ Domestic ■ International

Percent Repeat Visitors in Laingsburg, 2022

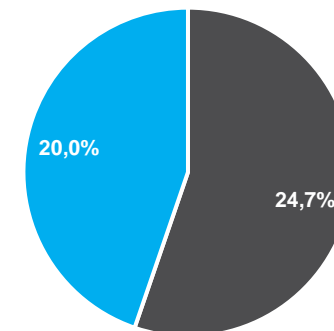


■ Domestic ■ International

Average Length of Stay in Laingsburg, 2022



Overnight Stays in Laingsburg, 2022

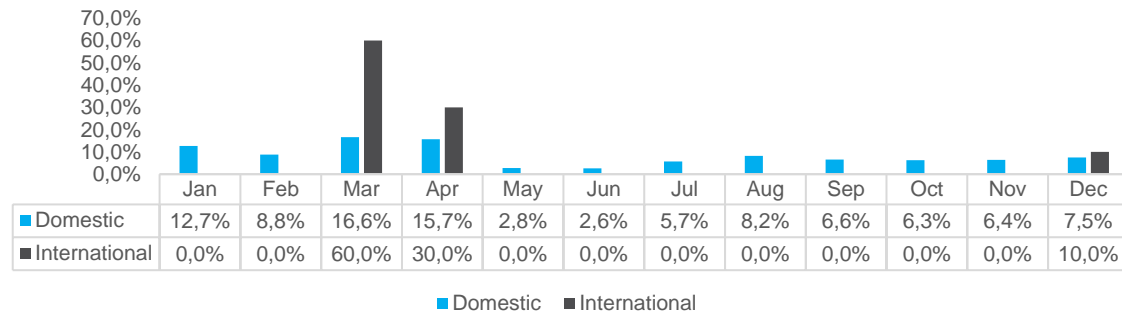


■ Domestic ■ International

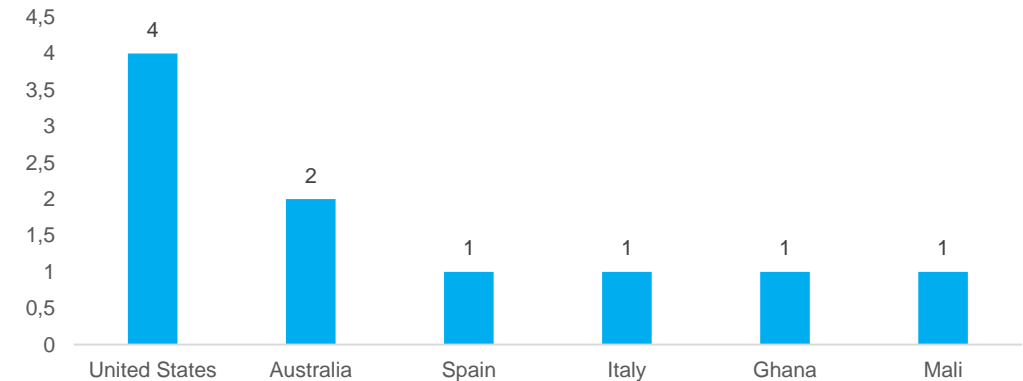
1.4. Mobile Insights: Laingsburg Visitor Trends

- The most popular months for tourists in Laingsburg was March and April for both domestic and international tourists.
- 1-2 days was recorded as the average length of stay for both international and domestic tourists.

Popular Months for Travel in Laingsburg, 2022

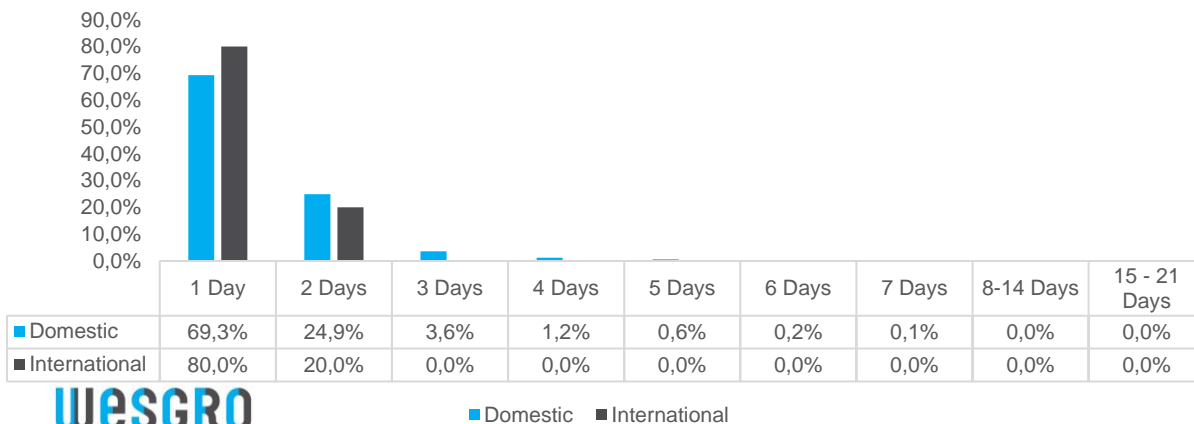


International Arrivals in Laingsburg, 2022

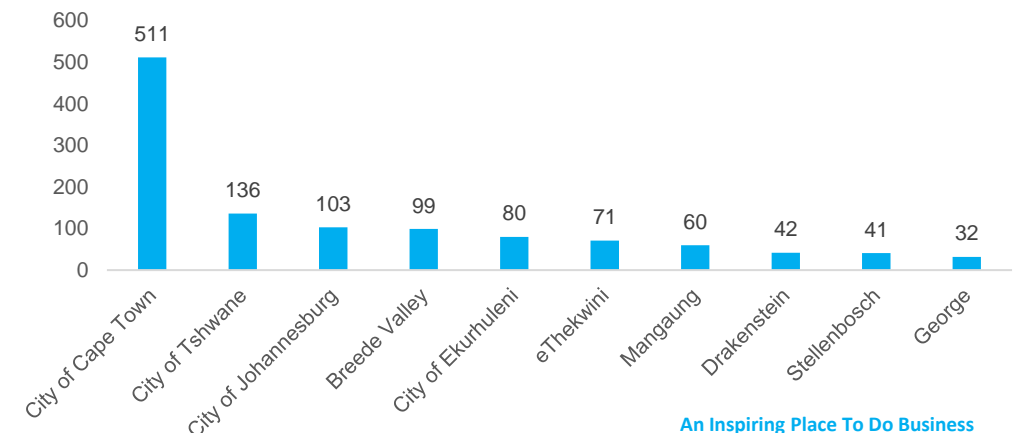


- Within the domestic data set, 511 tourists were from the City of Cape Town followed by the City of Tshwane (136) and City of Johannesburg (103). On the international front, the USA (4) had the top leading international arrivals to Laingsburg.

Average Length of Stay (number of days) in Laingsburg, 2022



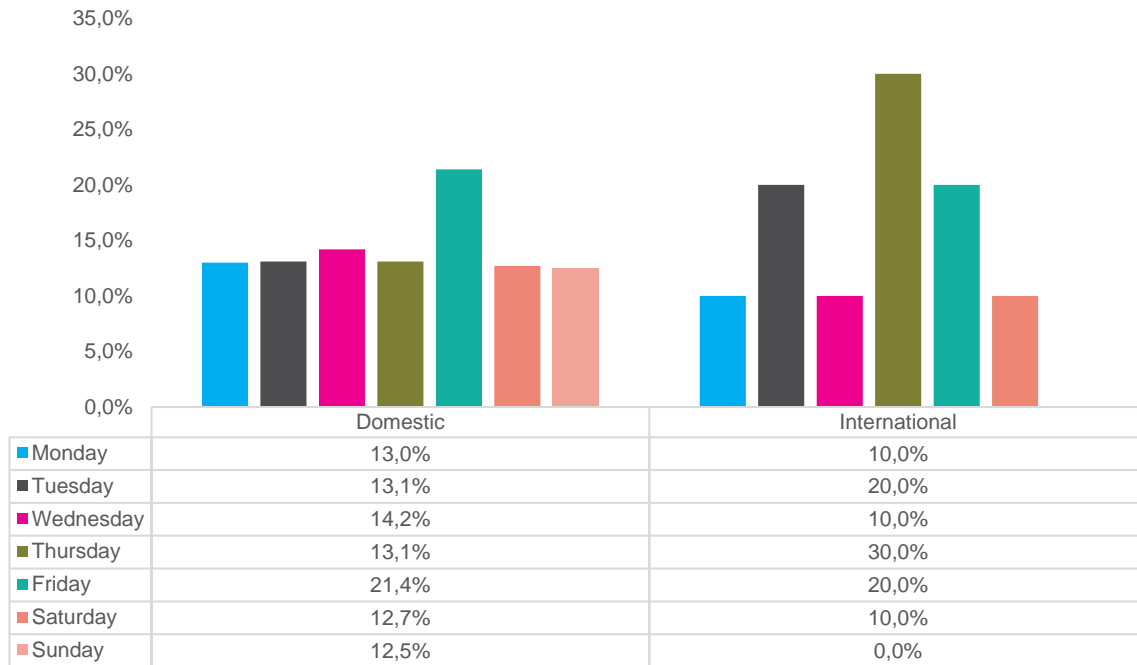
Top 10 Origin Municipalities in Laingsburg, 2022



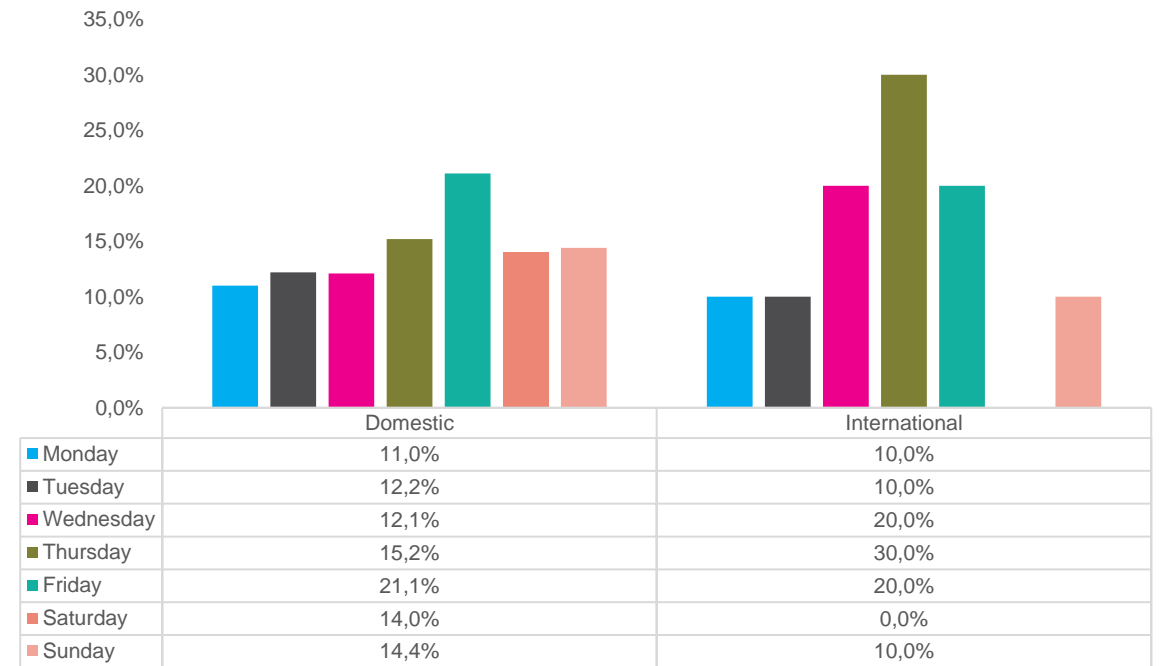
1.4. Mobile Insights: Laingsburg Visitor Trends

- Wednesdays and Fridays were the most popular arrival days for domestic visitors to Laingsburg. Fridays was also their popular departure day.
- For international visitors, Tuesdays, Thursdays and Fridays were their most popular arrival days and departures mostly occurred on either Wednesdays, Thursdays or Fridays.

Popular Arrival Days of the Week in Laingsburg, 2022



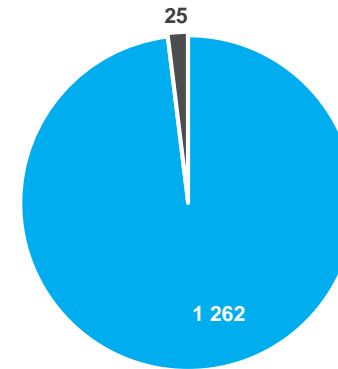
Popular Departure Days of the Week in Laingsburg, 2022



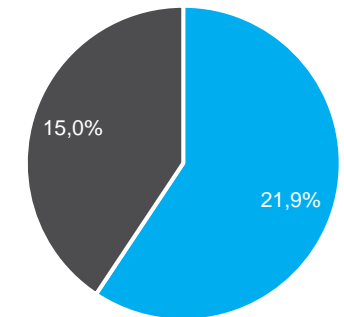
1.5. Mobile Insights: Prince Albert Visitor Trends

- A sample of 1,262 domestic and 25 international tourists visited the historic town of Prince Albert in 2022.
- International overnight tourists accounted for 56.0% in Prince Albert while domestic tourists accounted for 47.3% in 2022. Among the 4 town's reflected in this report, Prince Albert had the 2nd highest share of repeat visitors with 36,9%.
- On average both domestic & international tourists spent 2 days in Prince Albert.

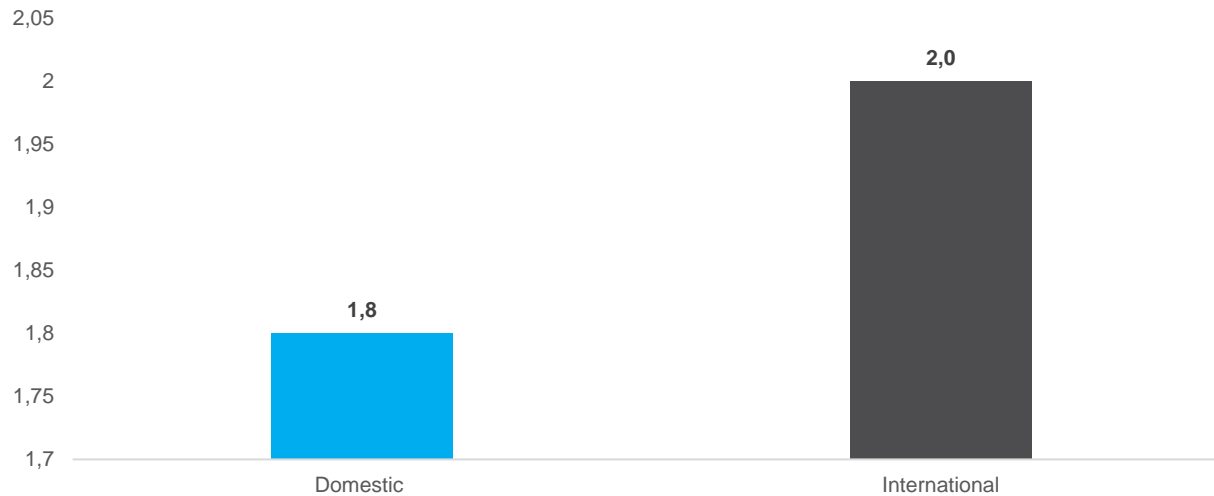
Prince Albert Sample Size, 2022



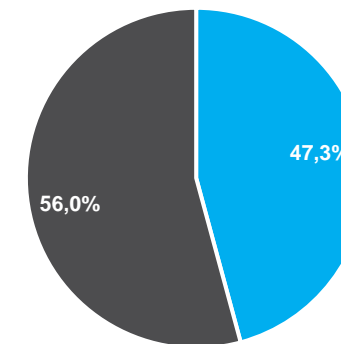
Percent Repeat Visitors in Prince Albert, 2022



Average Length of Stay in Prince Albert, 2022



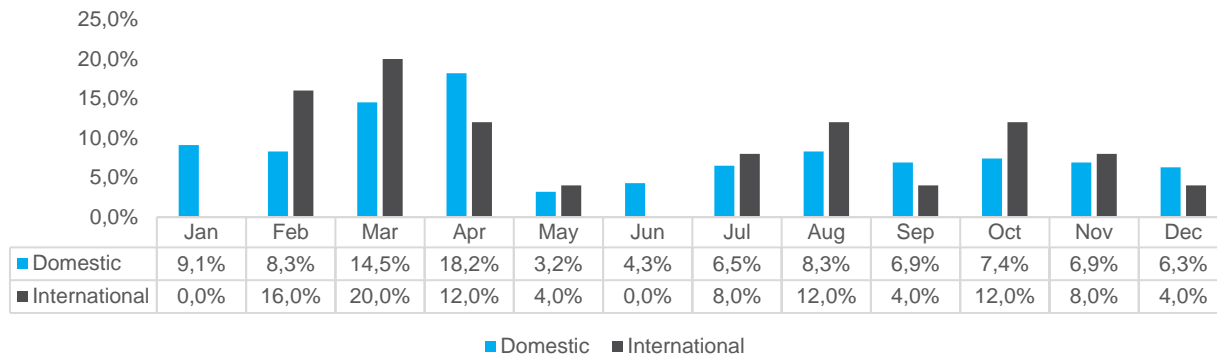
Overnight Stays in Prince Albert, 2022



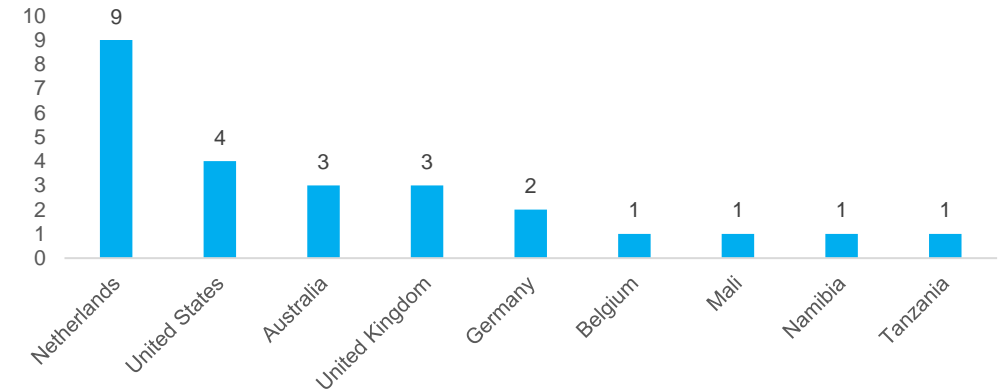
1.5. Mobile Insights: Prince Albert Visitor Trends

- For domestic tourists, April was the most popular month to visit, followed by March and January. While February (16%) and March (20%) were the popular months for international tourists.
- The average length of stay amongst tourists to Prince Albert for both domestic and international tourists was between 1 – 3 days.

Popular Months for Travel in Prince Albert, 2022

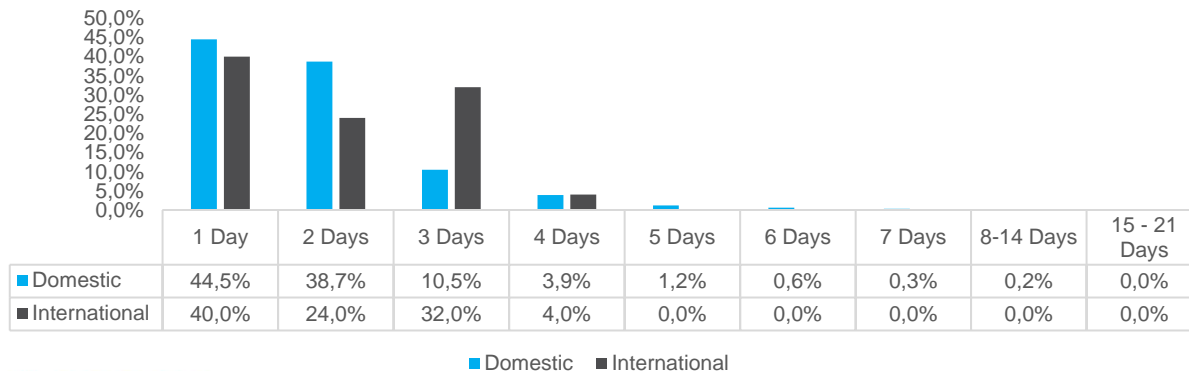


International Arrivals in Prince Albert, 2022

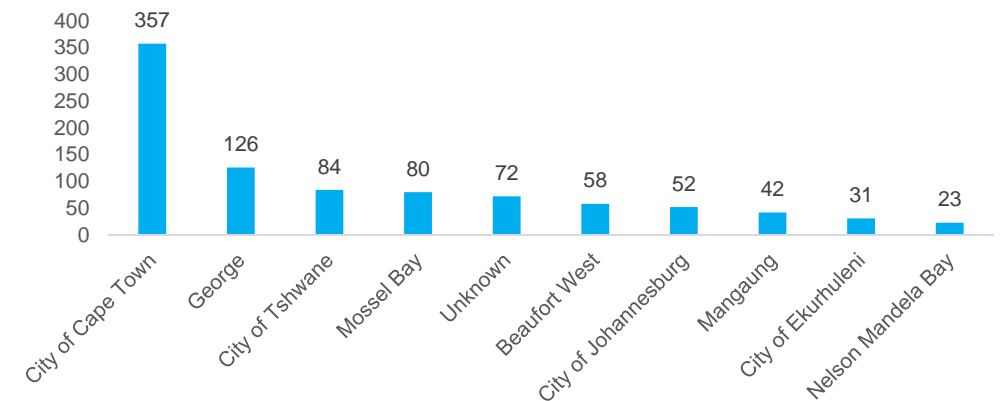


- Within the domestic data set, 357 tourists were from the City of Cape Town. On the international front, the Netherlands (9) and the USA (4) were the top leading international markets to Prince Albert.

Average Length of stay (number of days) in Prince Albert, 2022



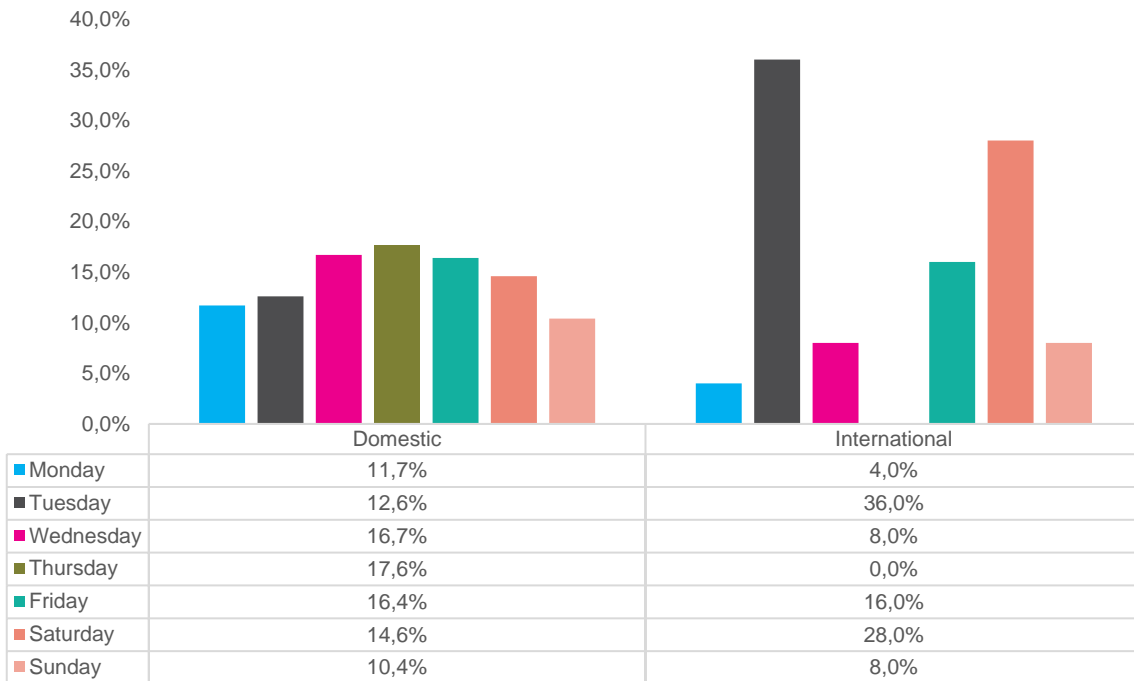
Top 10 Domestic Municipalities in Prince Albert, 2022



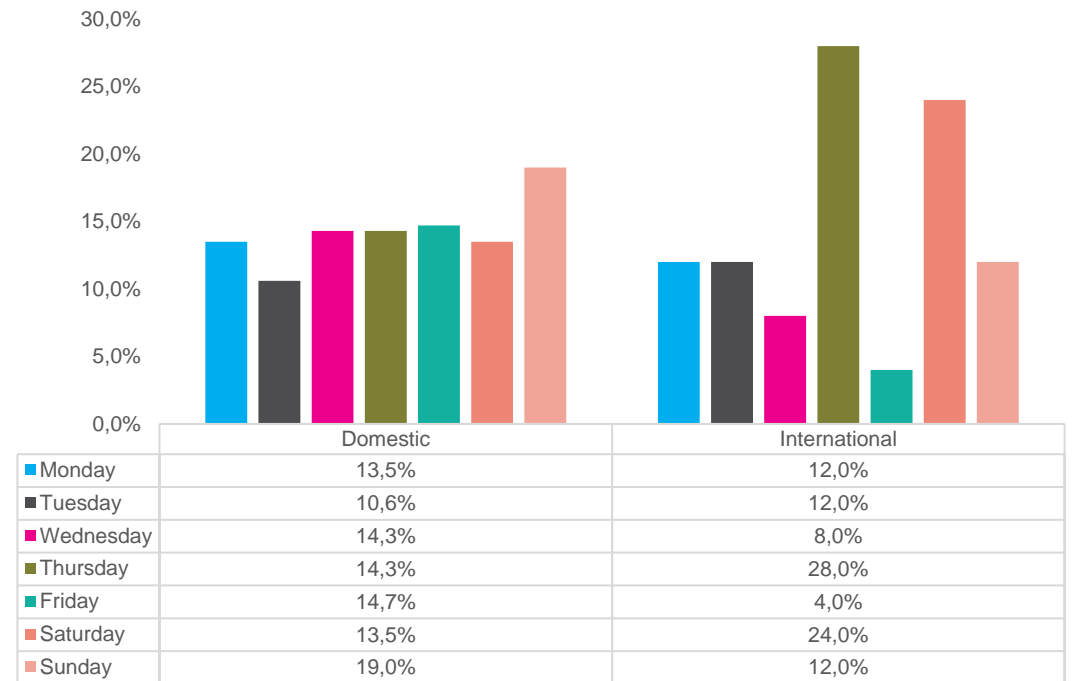
1.5. Mobile Insights: Prince Albert Visitor Trends

- Mid-week arrivals were the most popular arrival days for domestic visitors. Whereas Fridays and Sundays were their most popular departure days.
- For international tourists, Tuesdays and Saturdays were their most popular arrival days while Thursday and Saturdays were their popular departure days.

Popular Arrival Days of the Week in Prince Albert, 2022



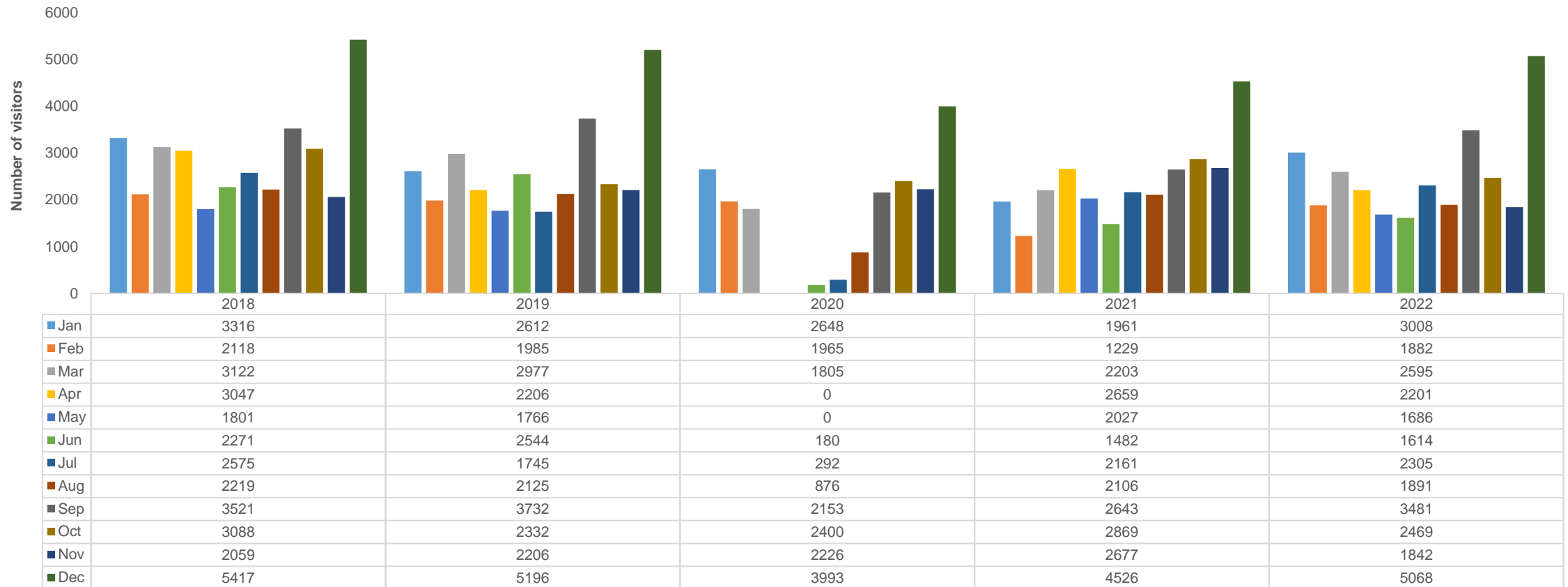
Popular Departure of the Week in Prince Albert, 2022



1.6. Karoo National Park

- The Karoo National Park received 30 042 visitors over the period January to December 2022. This represented a 5% year-on-year increase in visitor numbers when compared to 2021 and a 96% recovery when compared to arrival numbers in 2019.

Karoo National Park, 2018 - 2022



Source: SanParks 2023

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, 2023

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 calculated from 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.

2. Sources

- Rove Marketing powered by Near
- SanParks



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