



# Cape Karoo Tourism Visitor Trends

January–June 2023

# Contents

Section	Page
1. Executive Summary	3
2. Methodology and sample size	4
3. Cape Karoo visitor trends & patterns	5
4. Beaufort West visitor trends & patterns	8
5. Laingsburg visitor trends & patterns	11
6. Prince Albert visitor trends & patterns	14
7. Cape Karoo attractions	17
Appendix: ROVE Mobile Location Data	18

# 1. Executive Summary

- During the period between January and June 2023, Rove Mobile Location Data was used to gain insights into the travel behavior of tourists visiting the Cape Karoo and some of the towns in this region, namely Beaufort West, Laingsburg, and Prince Albert. The data was analysed separately for the region and for each town and was based on responses from sampled domestic and international tourists. These findings were observed:
- **Domestic tourists:** The mobile location data provided insights into the travel patterns of 16,519 domestic tourists who visited the Cape Karoo, followed by 14,700 tourists who visited Beaufort West, 1,071 visitors who went to Laingsburg, and 794 travellers who were in Prince Albert. It was found that most of the tourists who visited these towns were from Cape Town. The data also revealed that for the Cape Karoo, Beaufort West, and Laingsburg, both domestic and international tourists were repeat visitors who stayed an average of 1.6, 1.5, and 1.4 days respectively, and thus stayed overnight in the region. In the case of Prince Albert, only domestic tourists were repeat visitors to the town.
- **International tourists:** The mobile location data provided insights into the travel patterns of 110 international tourists who visited the Cape Karoo. Regarding the number of international tourists who visited the towns, 89 went to Beaufort West, six visited Prince Albert and three were in Laingsburg. It was found that tourists from India and Vietnam were attracted to Beaufort West and Laingsburg, while Prince Albert was visited by a small number of tourists from Mexico, Brazil, Australia, Israel, and Indonesia. Interestingly, for Prince Albert, international first-timers to the town stayed overnight and spent an average of 2.3 days in the region.
- **Length of stays:** The data revealed that for the Cape Karoo and the neighboring towns, weekend stays were mostly popular among domestic and international tourists, whereas weekly stays and long weekend stays were popular for international tourists. The average length of stay for all the towns was found to be between 1.4 to 1.6 days.
- Overall, the Rove Mobile Location Data provided valuable insights into the travel patterns of tourists visiting the Cape Karoo and towns within this region. The data can be used by tourism authorities to improve their marketing strategies and to tailor their offerings to the needs of tourists.

# 2. Methodology and sample size

## 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 anonymised and does not include any personally identifiable information.

## Why use mobile location data insights?

- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six regions.
- Mobile location data serves as a sample. It is not representative of 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 of **16,519 domestic** and **110 international** tourists who visited the Cape Karoo between January and June 2023. Within the domestic data set, 4,765 were from Cape Town, and out of the international tourists in the sample, 37 were from India. This can be seen in Figures 1, 2 and 3.



Sources: Wesgro, 2023

# 3. Cape Karoo visitor trends & patterns

## 3.1 Origin of tourists to the Cape Karoo

Figure 1: Sample size

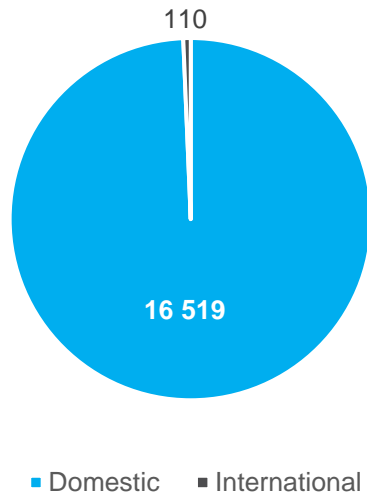


Figure 2: Municipalities of origin for domestic tourists to the Cape Karoo

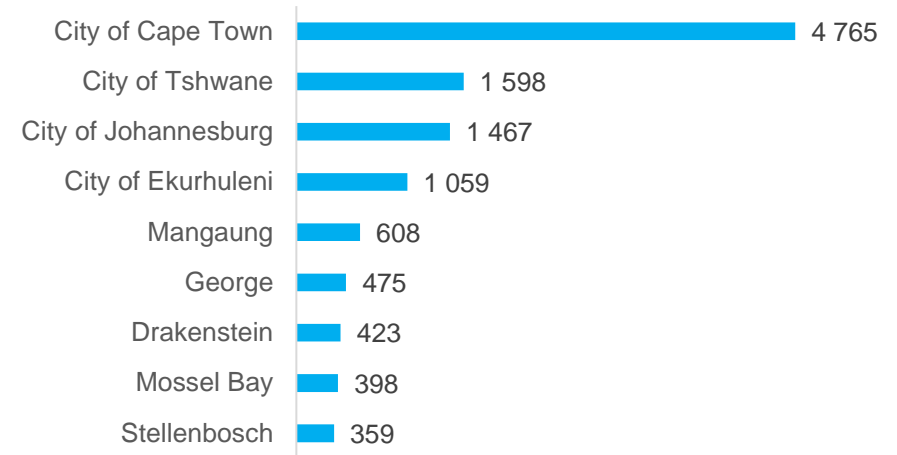
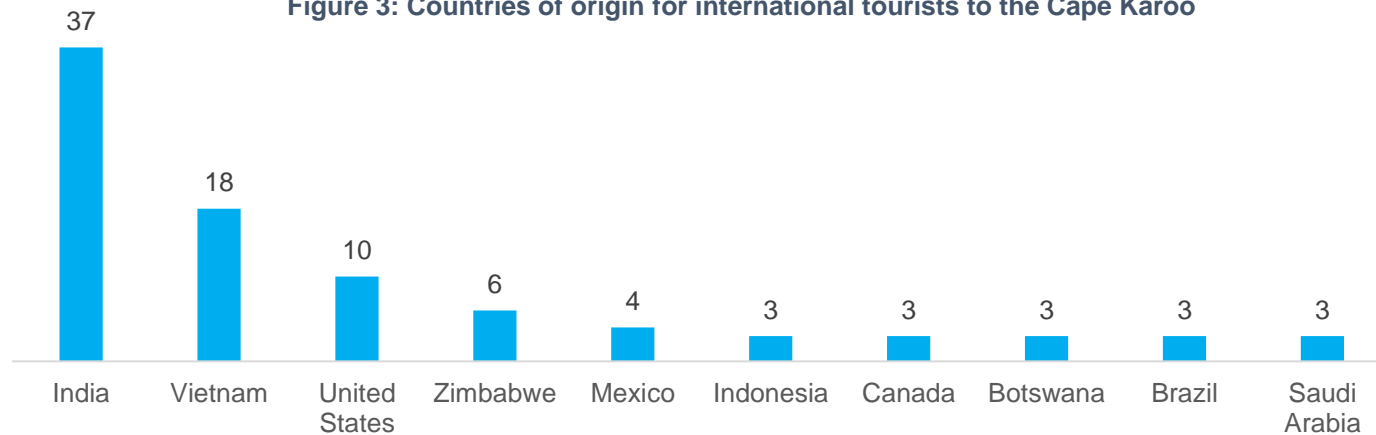
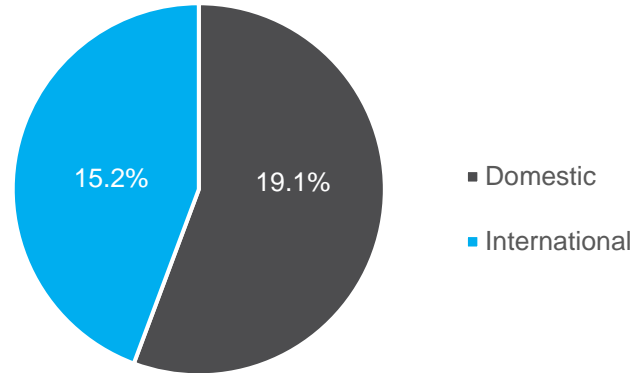


Figure 3: Countries of origin for international tourists to the Cape Karoo



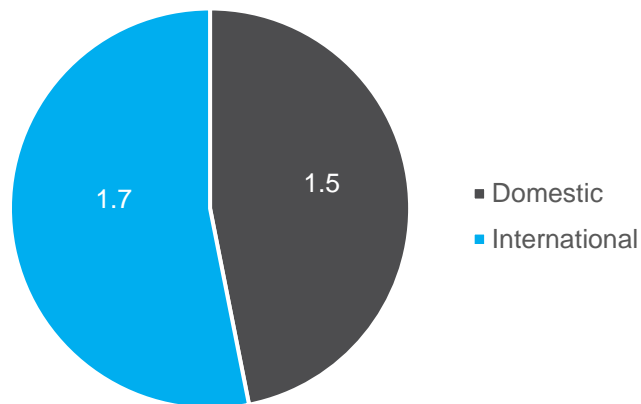
# 3. Cape Karoo visitor trends & patterns

3.2 Figure 4: Repeat visits to the Cape Karoo

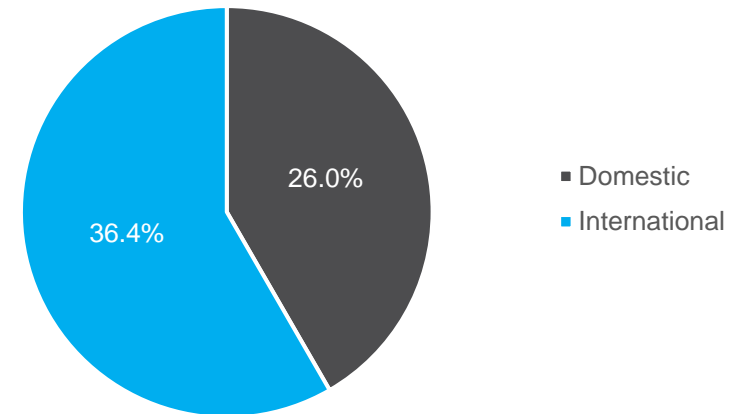


- For the period under review (Jan–Jun 2023), 19.1% of the domestic tourists and 15.2% of international visitors to the Cape Karoo were repeat visitors, as can be seen in Figure 4.
- On average, international tourists stayed for 1.7 days and domestic tourists stayed for 1.5 days in the region, as shown in Figure 5.
- Close to 37% of sampled international tourists stayed overnight in the Cape Karoo, while the domestic market accounted for 26.0% of the overnights. (Figure 6).

3.3 Figure 5: Average length of stay

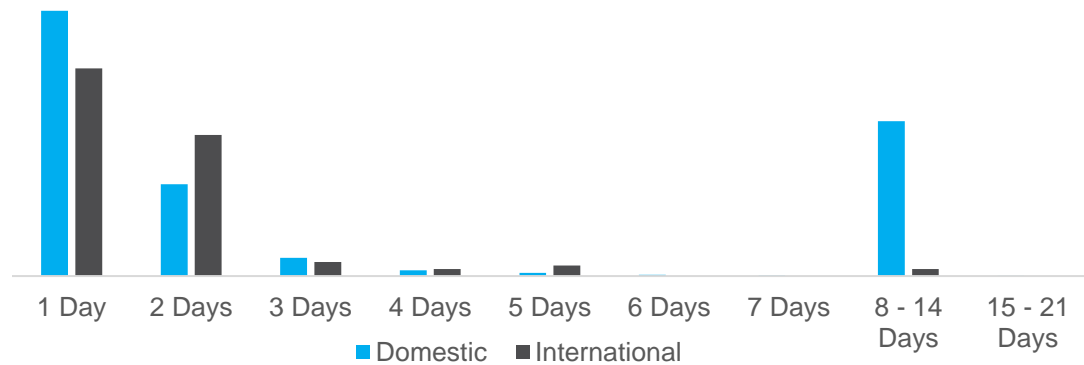


3.4 Figure 6: Overnight stay in the Cape Karoo



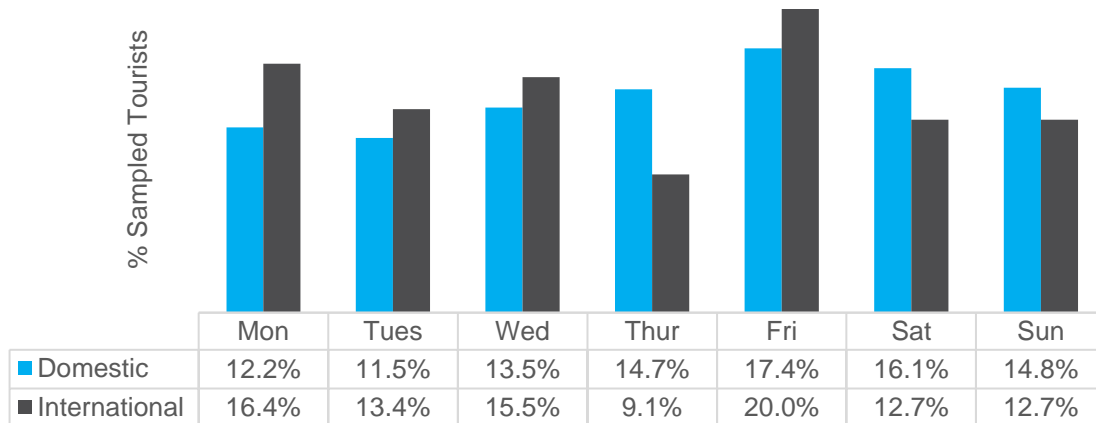
# 3. Cape Karoo visitor trends & patterns

3.5 Figure 7: Number of days in the Cape Karoo, Jan-Jun 2023

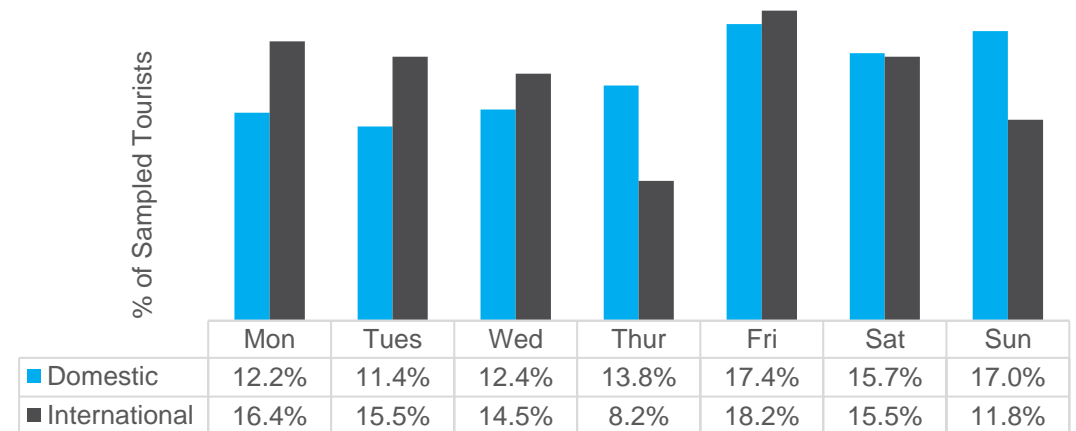


- Figure 7 shows that domestic tourists preferred to stay in the Cape Karoo for one day or 8-14 days, while international tourists stayed for one and two days.
- Figures 8 and 9 show that domestic tourists to the region were mostly likely to arrive on Friday (17.4%) and depart on Saturday (16.4%), pointing to the popularity of weekend stays. In contrast, international tourists were most likely to arrive on Friday (20.0%) and depart on Monday (16.4%).

3.6 Figure 8: Popular arrivals day in the Cape Karoo, Jan-Jun 2023



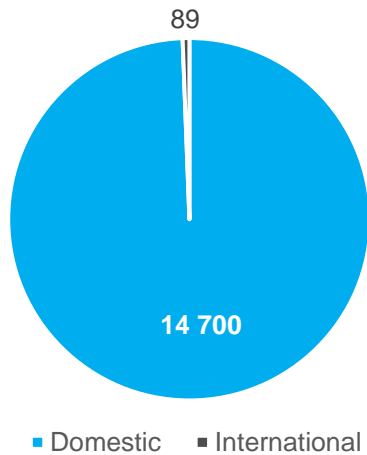
3.7 Figure 9: Popular departure days from the Cape Karoo, Jan-Jun 2023



# 4. Beaufort West visitor trends & patterns

## 4.1 Origin of tourists to Beaufort West

Figure 10: Sample size



For Beaufort West, the mobile location data was drawn from a sample of **14,700 domestic** and **89 international** tourists who visited the town between January and June 2023. Within the domestic data set, 3,809 were from Cape Town, and out of the sampled international tourists, 32 were from India. This can be seen in Figures 10, 11 and 12

Figure 11: Municipalities of origin for domestic tourists to Beaufort West

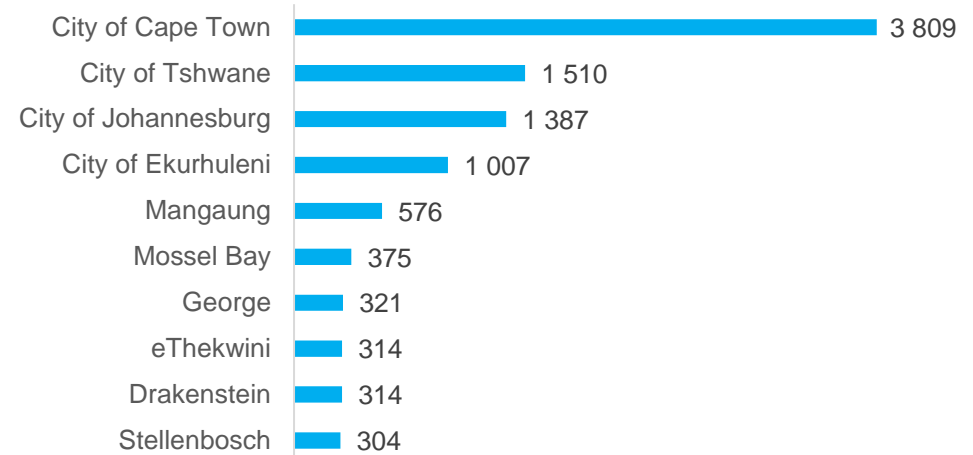
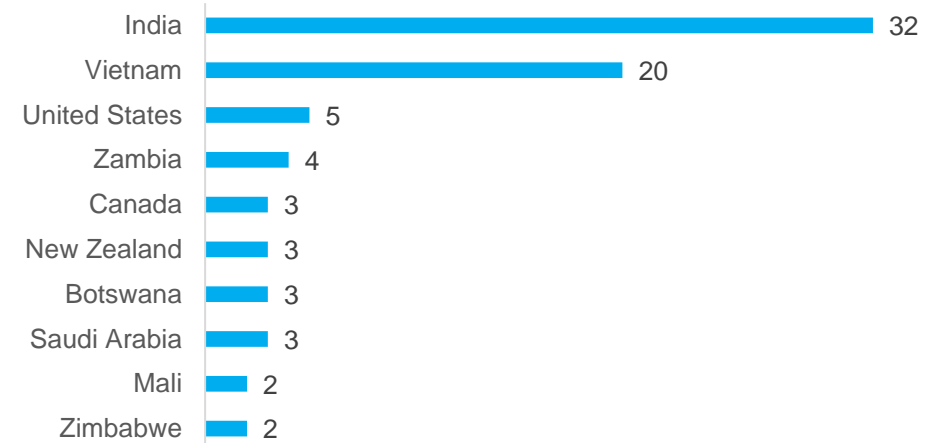


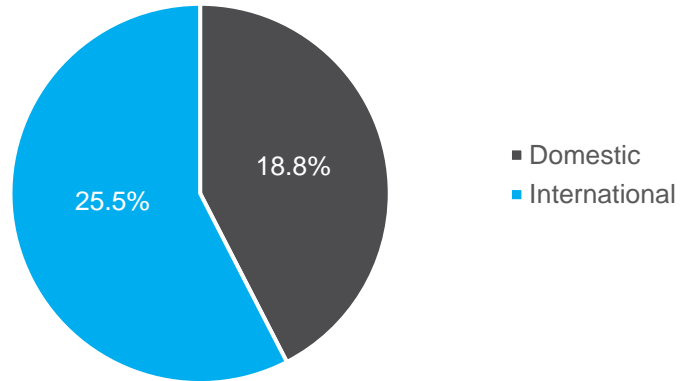
Figure 12: Countries of origin for international tourists to Beaufort West





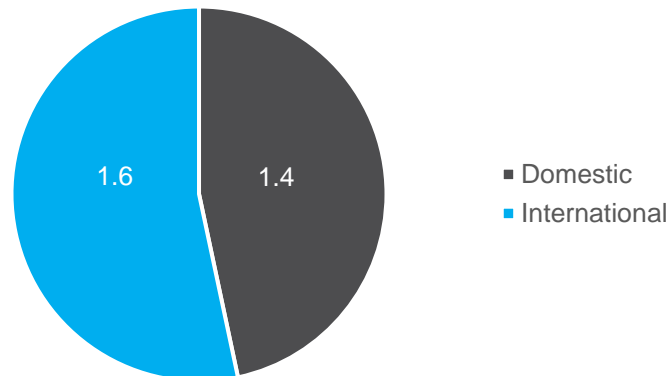
# 4. Beaufort West visitor trends & patterns

4.2 Figure 13: Repeat visits to Beaufort West

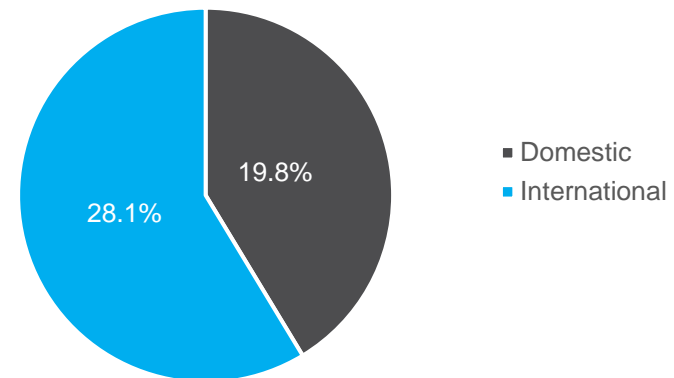


- For the period under review (Jan–Jun 2023), 25.5% of the international tourists and 18.8% of domestic travellers were repeat visitors, as can be seen in Figure 13.
- On average, international tourists stayed for 1.6 days and domestic tourists stay for 1.4 days in the town, as shown in Figure 14.
- Close to 30% of sampled international tourists stayed overnight in town, while 19.8% were from the domestic market (Figure 15).

4.3 Figure 14: Average length of stay in Beaufort West

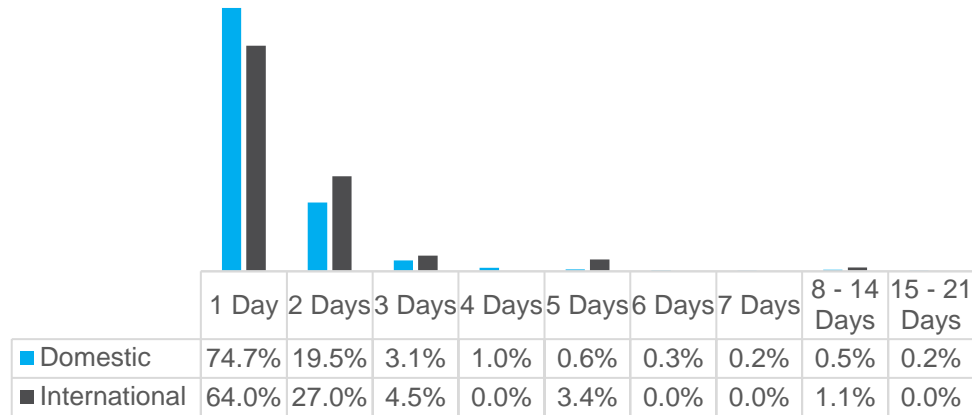


4.4 Figure 15: Overnight stays in Beaufort West



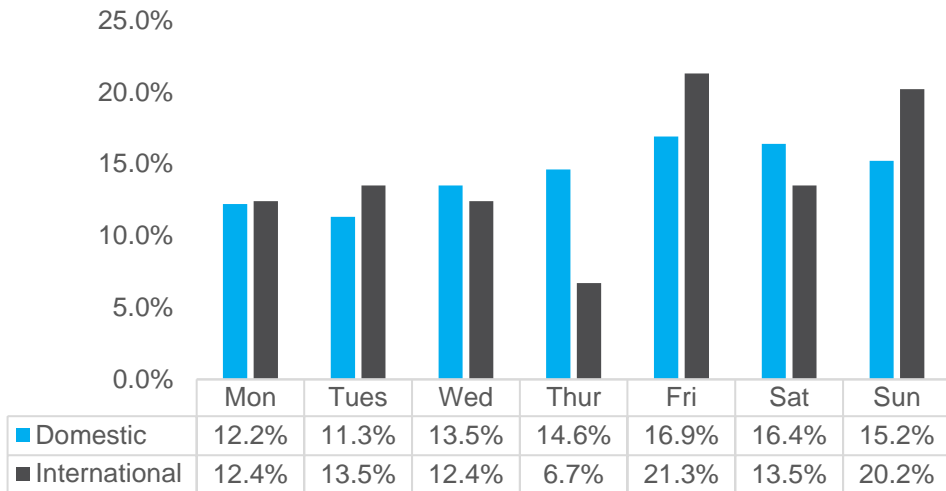
# 4. Beaufort West visitor trends & patterns

4.5 Figure 16: Number of days in Beaufort West, Jan-Jun 2023

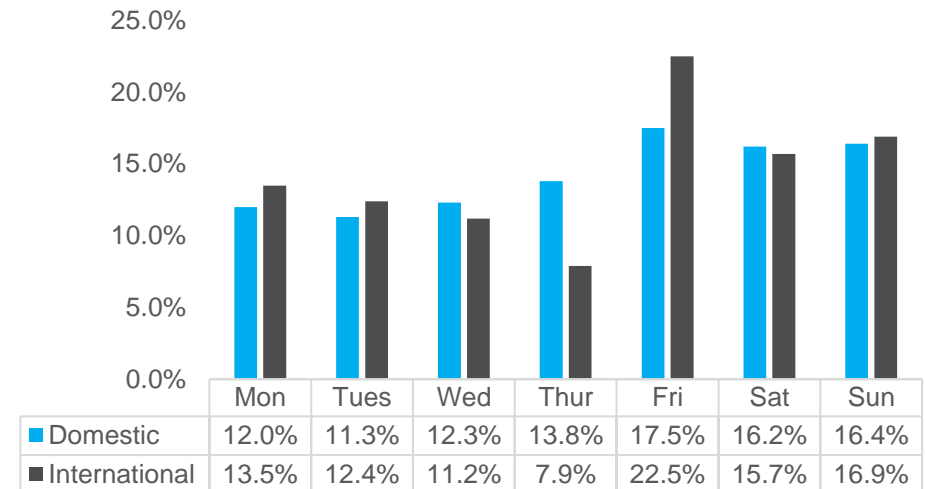


- Both domestic and international tourists preferred to stay in Beaufort West for 1 day, as seen in Figure 16.
- Figures 17 and 18 show that domestic tourists to the town were most likely to arrive on Friday (16.9%) and depart on Saturday or Sunday. In contrast, international tourists were most likely to arrive and depart on Friday.

4.6 Figure 17: Popular arrival days in Beaufort West, Jan-Jun 2023



4.7 Figure 18: Popular departure days from Beaufort West, Jan-Jun 2023



# 5. Laingsburg visitor trends & patterns

## 5.1 Origin of tourists to Laingsburg

Figure 19: Sample Size

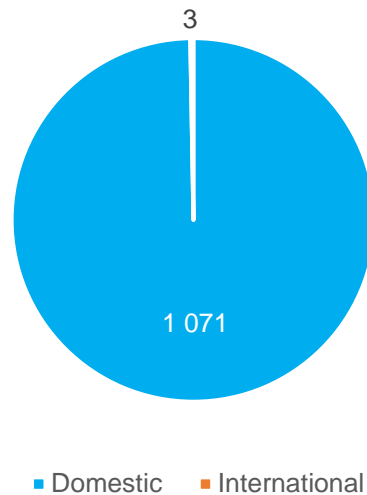
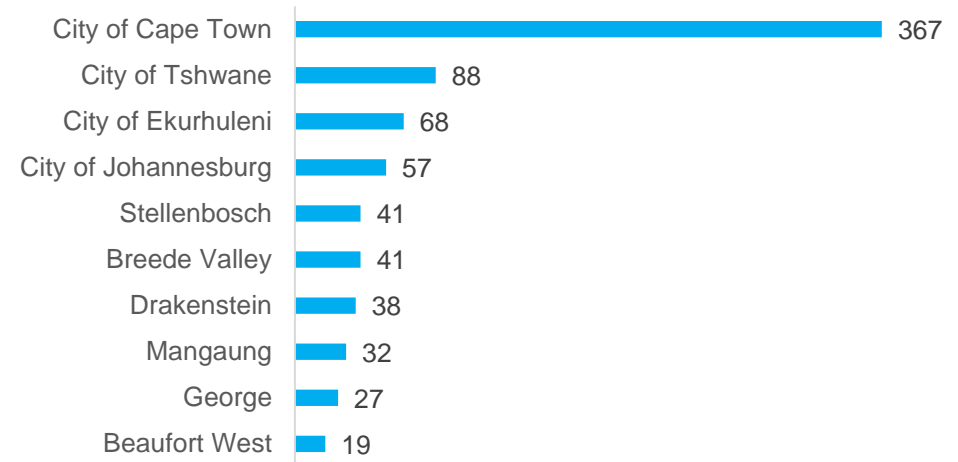
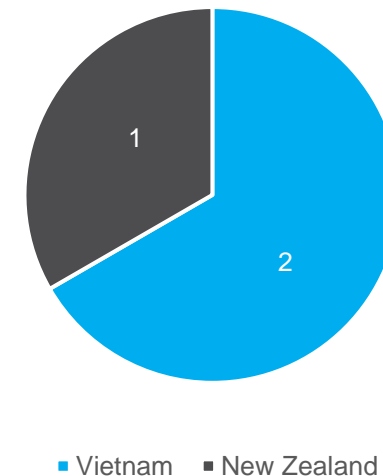


Figure 20: Municipalities of origin for domestic tourists to Laingsburg



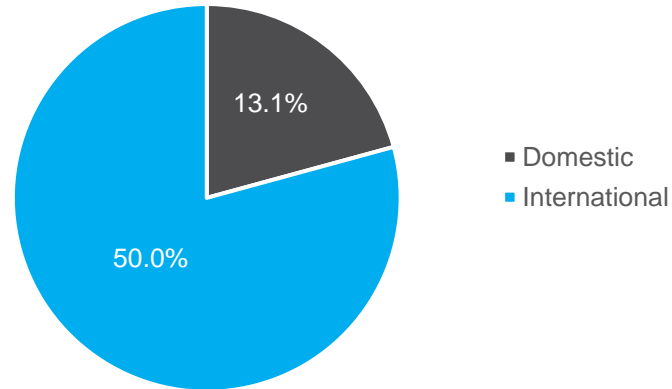
For Laingsburg, the mobile location data was drawn from a sample of **1,071 domestic** and **three international** tourists who visited the town between January and June 2023. Within the domestic data set, 367 visitors were from Cape Town, and out of the sampled international tourists, two were from New Zealand and one from Vietnam. This can be seen in Figures 19, 20 and 21.

Figure 21: Countries of origin for international tourists to Laingsburg



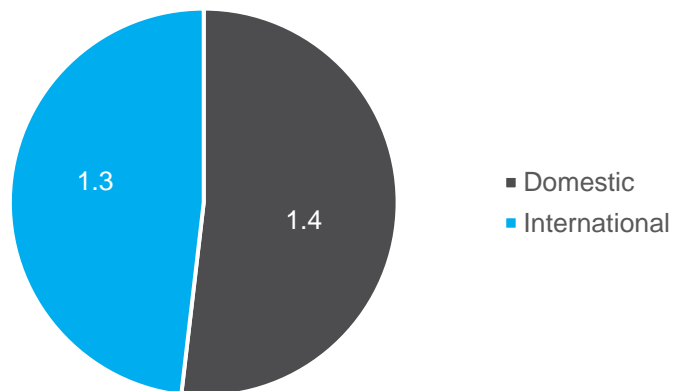
# 5. Laingsburg visitor trends & patterns

5.2 Figure 22: Repeat visits to Laingsburg

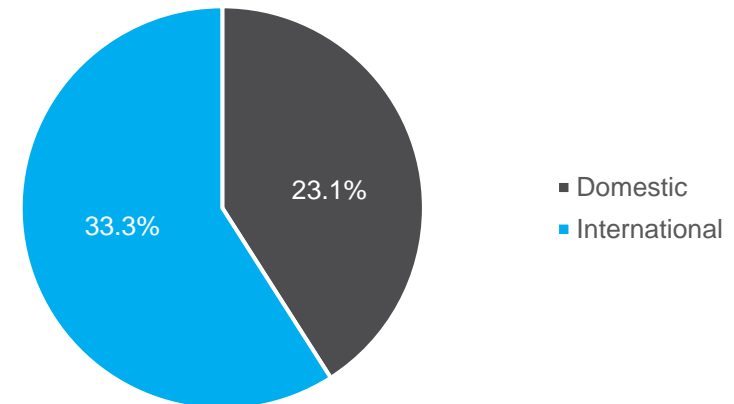


- For the period under review (Jan–Jun 2023), 50.0% of international tourists and 13.1% of domestic tourists were repeat visitors, as can be seen in Figure 22.
- On average, domestic tourists stayed for 1.4 days and international tourists spent 1.3 days in the town, as shown in Figure 23.
- Close to 34% of sampled international tourists stayed overnight in the town, while 23.4% were from the domestic market (Figure 24).

5.3 Figure 23: Average length of stay in Laingsburg

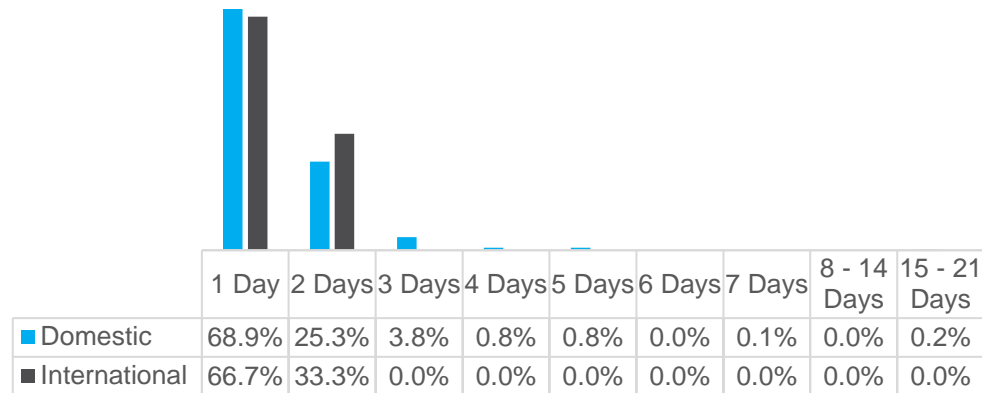


5.4 Figure 24: Overnight stays in Laingsburg



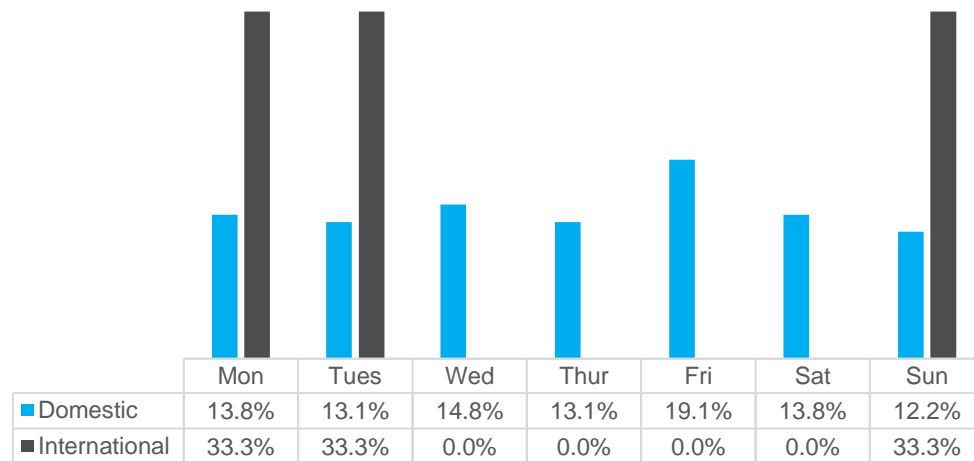
# 5. Laingsburg visitor trends & patterns

5.5 Figure 25: Number of days in Laingsburg, Jan-Jun 2023

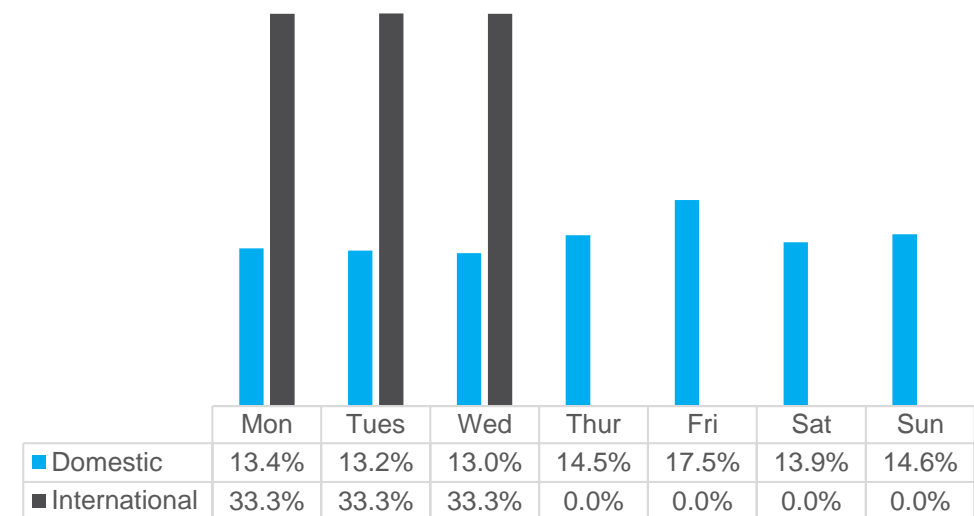


- Both domestic and international tourists preferred to stay in Laingsburg for one or two days, as seen in Figure 25.
- Figures 26 and 27 show that domestic tourists to the town were most likely to arrive and depart on Friday (19.1% and 17.5%). In contrast, international tourists were most likely to arrive a day earlier (Monday or Tuesday, 33.3%) and depart on Wednesday (33.3%).

5.6 Figure 26: Popular arrivals days in Laingsburg, Jan-Jun 2023



5.7 Figure 27: Popular departure days in Laingsburg, Jan-Jun 2023



# 6. Prince Albert visitor trends & patterns

## 6.1 Origin of tourists to Prince Albert

Figure 28: Sample size

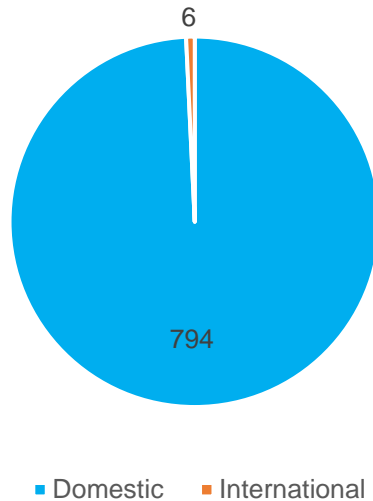


Figure 29: Municipalities of origin for domestic tourists to Prince Albert

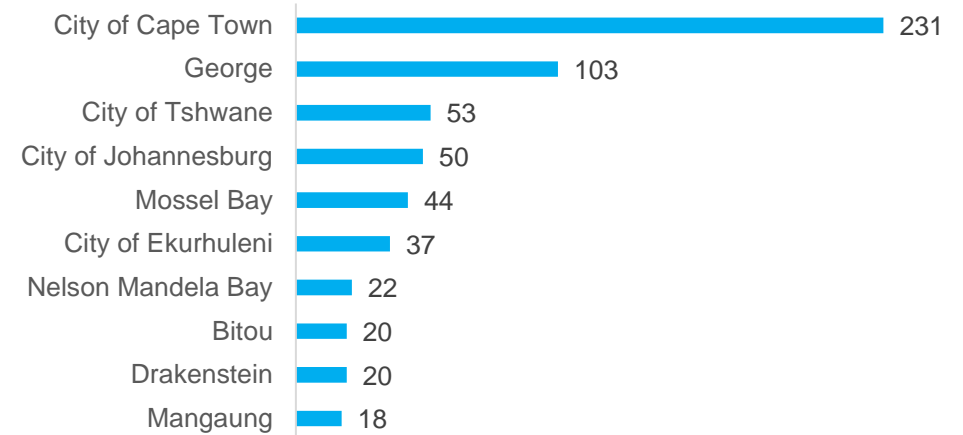
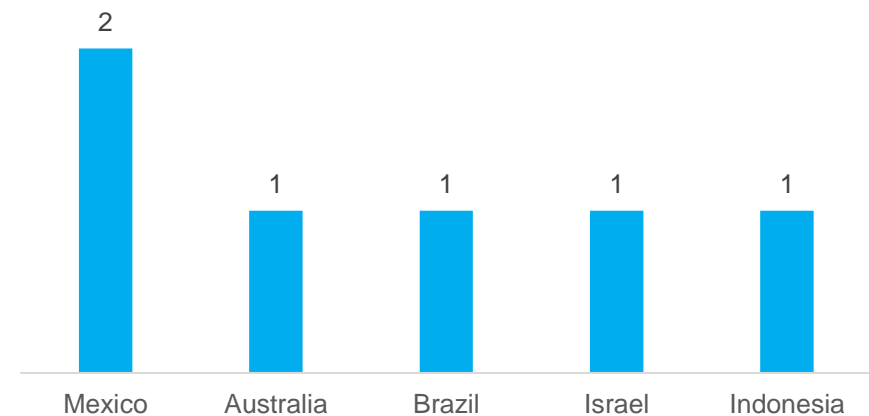


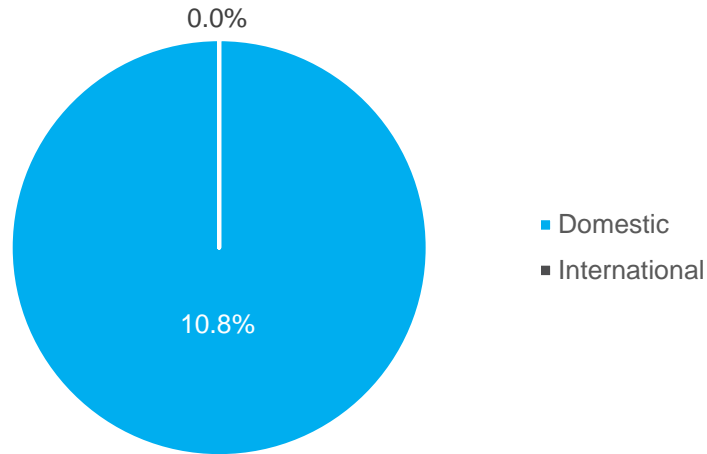
Figure 30: Countries of origin for international tourists to Prince Albert



For Prince Albert, the mobile location data was drawn from a sample of **794 domestic** and **6 international** tourists who visited the town between January and June 2023. Within the domestic data set, 231 were from Cape Town, and out of the sampled international tourists, two were from Mexico. Single tourists came from each of the following countries: Australia, Brazil, Israel and Indonesia. This can be seen in Figures 28, 29 and 30.

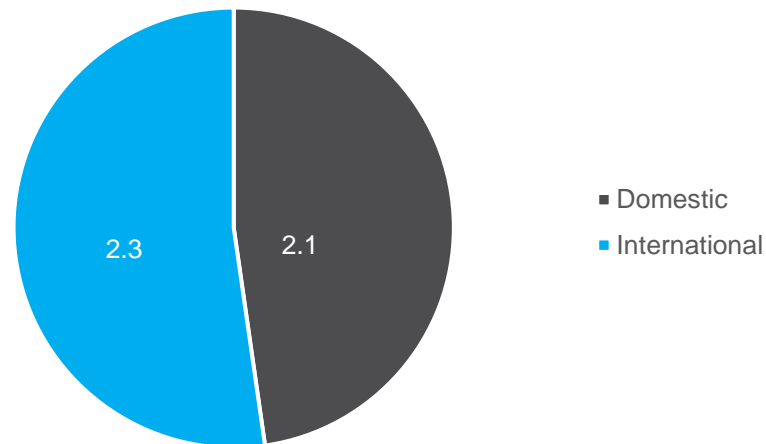
# 6. Prince Albert visitor trends & patterns

6.2 Figure 31: Repeat visits to Prince Albert

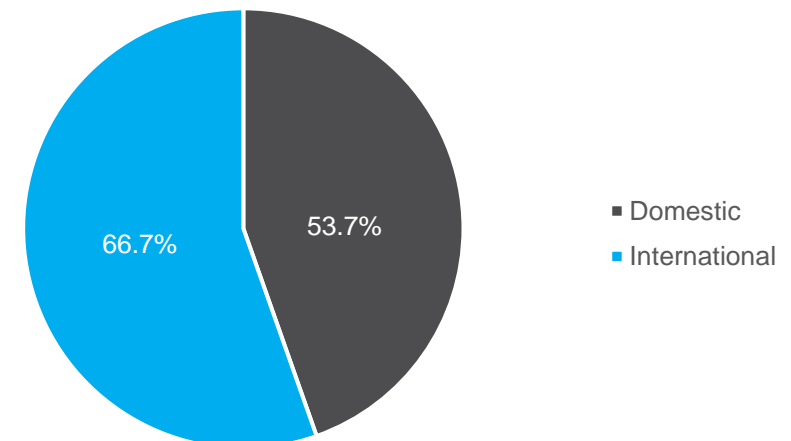


- For the period under review (Jan–Jun 2023), 10.8% of domestic tourists were repeat visitors, as can be seen in Figure 31.
- Figure 32 shows that on average, international tourists stayed for 2.3 days and domestic tourists stayed for 2.1 days in the town.
- Close to 70% of sampled international tourists stayed overnight in Prince Albert, while 53.7% were from for the domestic market (Figure 33).

6.3 Figure 32: Average length of stay in Prince Albert

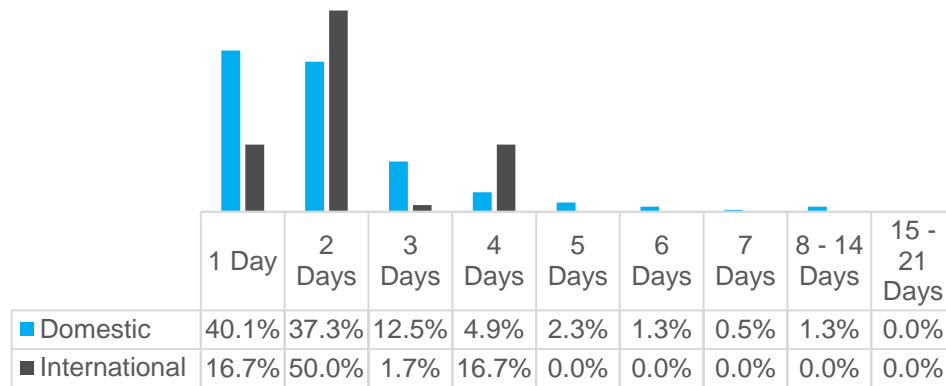


6.4 Figure 33: Overnight stays in Prince Albert



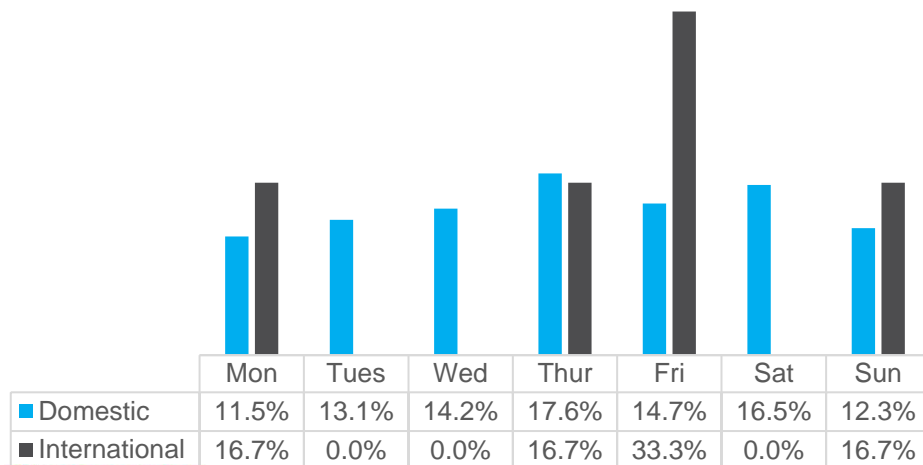
# 6. Prince Albert visitor trends & patterns

6.5 Figure 34: Number of days in Prince Albert

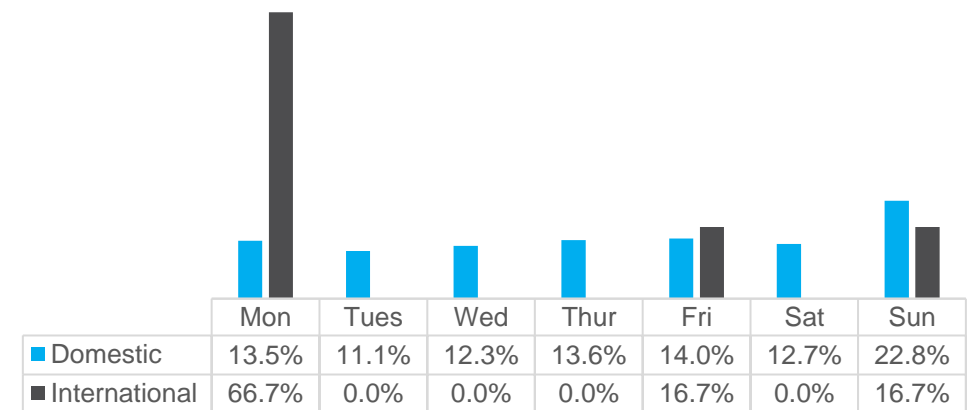


- Figure 34 shows that domestic tourists preferred to stay in Prince Albert for 1 day, while international tourists stayed for two days.
- Figures 35 and 36 illustrate that domestic tourists to the town were most likely to arrive on Thursday (17.6%) and depart on Sunday (22.8%), In contrast, international tourists were most likely to arrive on Friday (33.3%) and depart on Monday (66.7%).

6.6 Figure 35: Popular arrivals days in Prince Albert



6.7 Figure 36: Popular departure days in Prince Albert



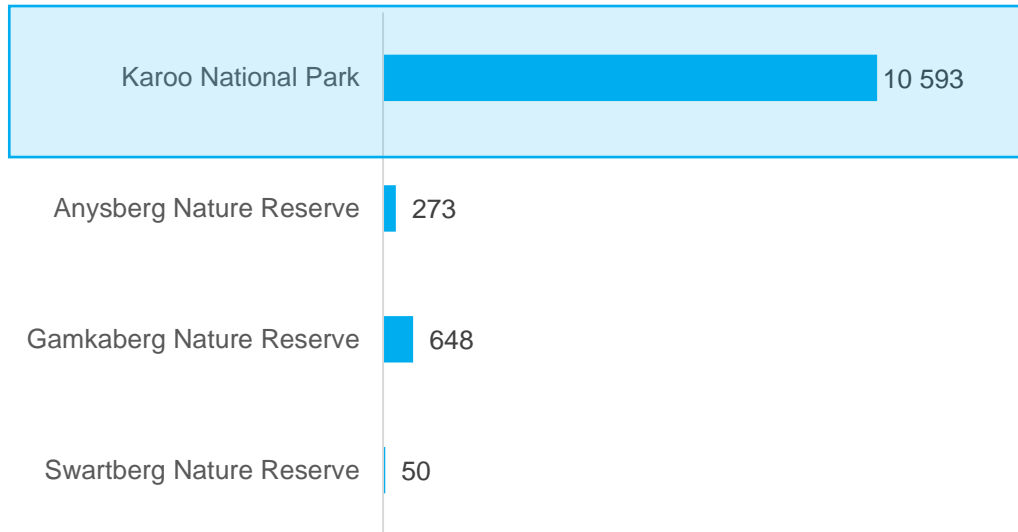


# 7. Cape Karoo attractions

Table 1: Cape Karoo attractions; half-year performance, Jan-Jun 2023

Cape Karoo	Jan-Jun 2022/2023 % Change	Jan-Jun 2019/2023 % Recovery
1. Karoo National Park	-18.4%	75.2%
2. Anysberg Nature Reserve	-2.5%	164.5%
3. Gamkaberg Nature Reserve	-38.1%	59.3%
4. Swartberg Nature Reserve	108.3%	208.3%

Figure 37: Cape Karoo attractions half-year performance, Jan-Jun 2023



- According to the latest statistics, the Cape Karoo region has witnessed a significant rise in the number of visitors to its attractions during the first half of 2023. Specifically, the four participating attractions in the region, including the Karoo National Park, Gamkaberg Nature Reserve, Anysberg Nature Reserve, and Swartberg Nature Reserve, collectively welcomed a total of 11,564 visitors between January and June 2023. These figures are presented in Figure 37.
- Moreover, Table 1 highlights that both the Anysberg Nature Reserve and the Swartberg Nature Reserve have made a complete recovery during the aforementioned period when compared to the same period in 2019.
- However, it is worth noting that there was a slight decrease of -19.3% in visitor arrivals to the four attractions compared to the same period in 2022, which saw a total of 14,337 visitors. Nevertheless, the recovery rate of 74.8% compared to the same period in 2019, when there were 15,464 visitors, is a positive sign for the region's tourism industry.
- Further, Figure 37 also reveals that the Karoo National Park was the most popular attraction in the region during the first six months of 2023, with a total of 10,593 visitors. In contrast, Gamkaberg Nature Reserve, Anysberg Nature Reserve, and Swartberg Nature Reserve witnessed 648, 273, and 50 visitors, respectively, during the same period.

# Appendix: ROVE Mobile Location Data

# Definitions of Mobile Location Data and Tourists vs non-Tourists

- About Mobile Location Data

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

- Who Are Tourists?

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

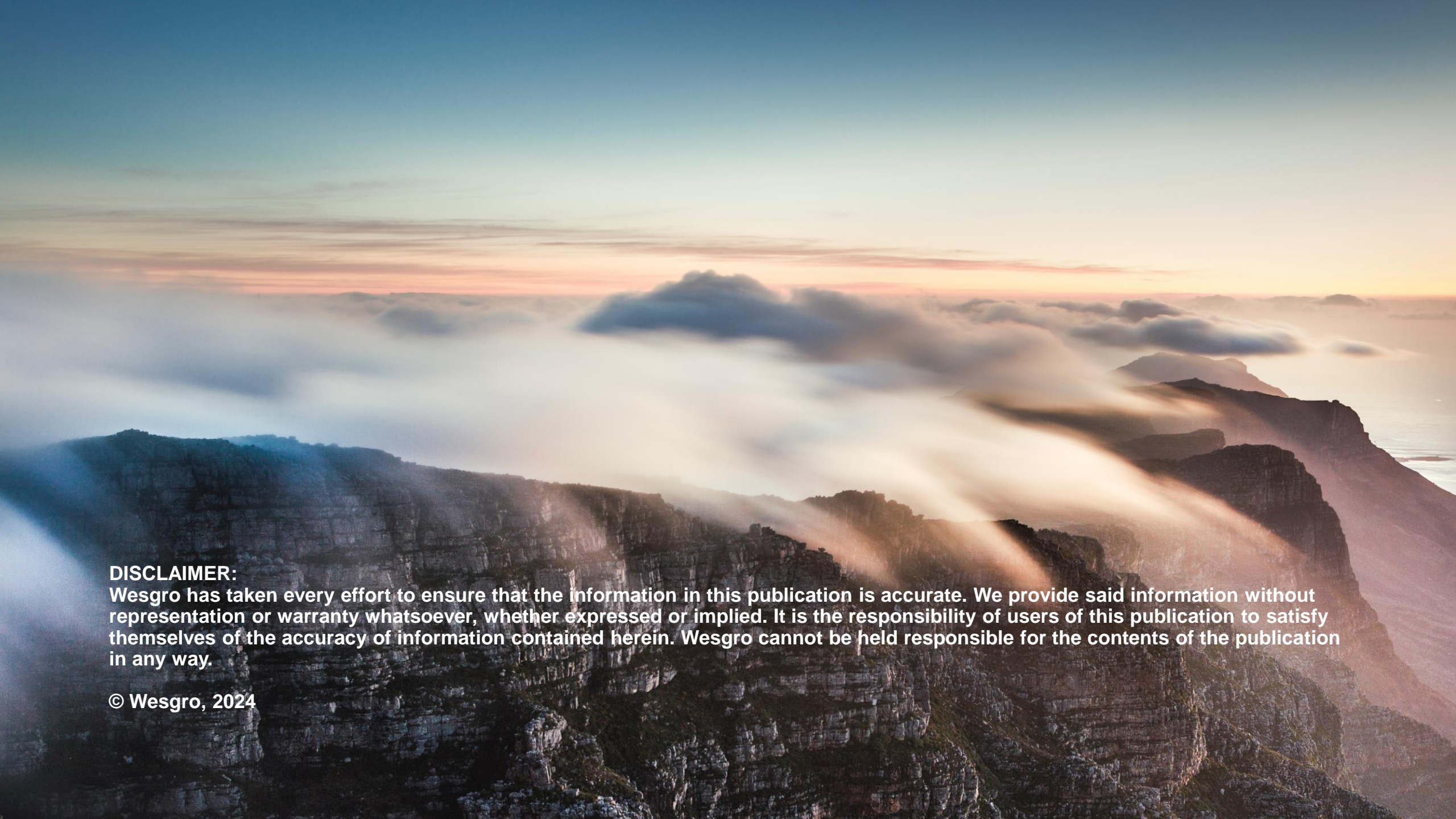
Source: Rove, 2024

# Definitions of Mobile Location Data and Tourists vs non-Tourists

Primary Study Geography	Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled more than 25 miles (40km), and they have stayed in the polygon for more than 120 minutes, they are a tourist.
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Residents of the Western Cape are not counted as a tourists</li> <li>Minimum distance travelled to meet the definition of tourist. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon</li> <li>Minimum duration of visit of 120 minutes excludes commuters driving through each region</li> </ul>	
Secondary Study Geography	Tourists are defined as:
City or Town	When a visitor does not live or work in the city or town and they have travelled more than 25 miles (40km), and they have stayed for more than 45 minutes, they are a tourist.
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Residents of a city are not counted as tourists to the city</li> <li>Minimum distance traveled of 40km satisfies tourist definition for minimum distance travelled. Distance travelled is calculated from the visitors' Common Evening Location (latitude and longitude) to the centre of the polygon</li> </ul>	
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
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Any 90-day period refers to any consecutive 90 days in their mobile location data history</li> <li>Filter out visitors not staying for any meaningful length of time (couriers, taxis etc.).</li> </ul>	
What are Tourist Segments?	
<ul style="list-style-type: none"> <li><b>Local Tourists:</b> Tourists who reside within the same region.</li> <li><b>Domestic Tourists:</b> Tourists who reside in South Africa outside of the Western Cape</li> <li><b>International Tourists:</b> Tourists who reside outside of South Africa</li> </ul>	

# Glossary of Key Terms

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



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