



# Garden Route & Klein Karoo

January – December 2022

Tourism Trends

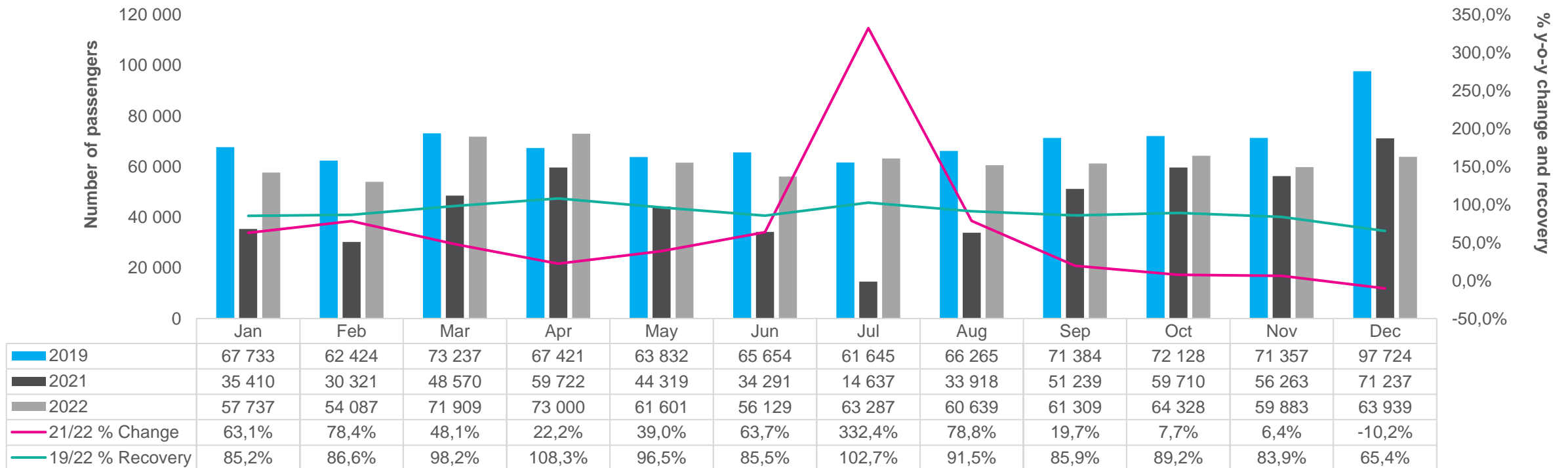
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# 1. George Airport Passenger Movement

- George Airport recorded 740,990 two-way passengers for the full year 2022 and recovered by 89% when compared to the performance in 2019.
- The months April (108.3%) and July (102.7%) both fully recovered against passenger levels recorded pre-pandemic (2019).

TWO-WAY PASSENGER MOVEMENT THROUGH GEORGE AIRPORT, JAN-DEC 2019-2022

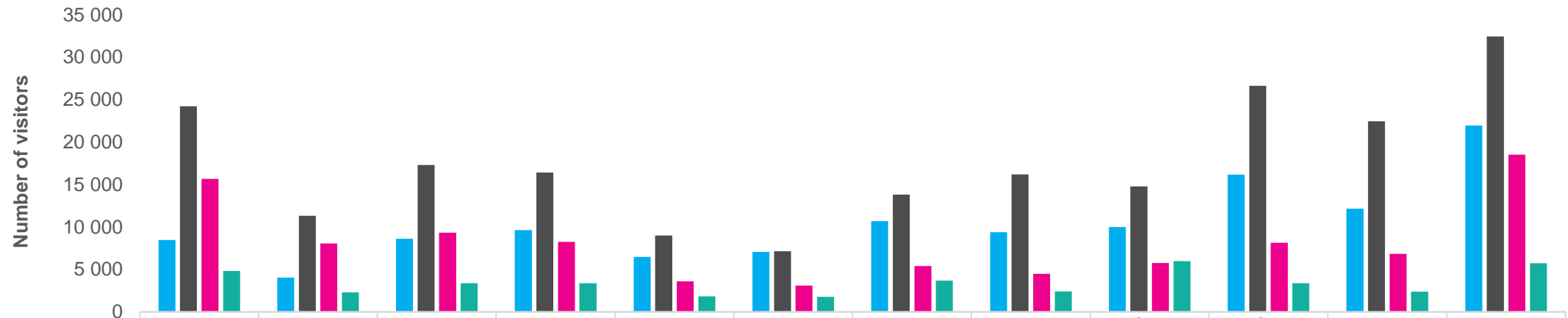


Source: ACSA, 2023

## 2. Garden Route & Klein Karoo Attractions

- A total of 474 298 visitors were received in 2022 from the four participating Garden Route & Klein Karoo attractions, with the largest share welcomed at the Tsitsikamma National Park throughout the year.
- In 2022, the highest recorded number of visitors was during the summer months of November – January and a drop in numbers was seen over the colder months starting from May to August 2022.

VISITORS TO PARTICIPATING GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN-DEC 2022

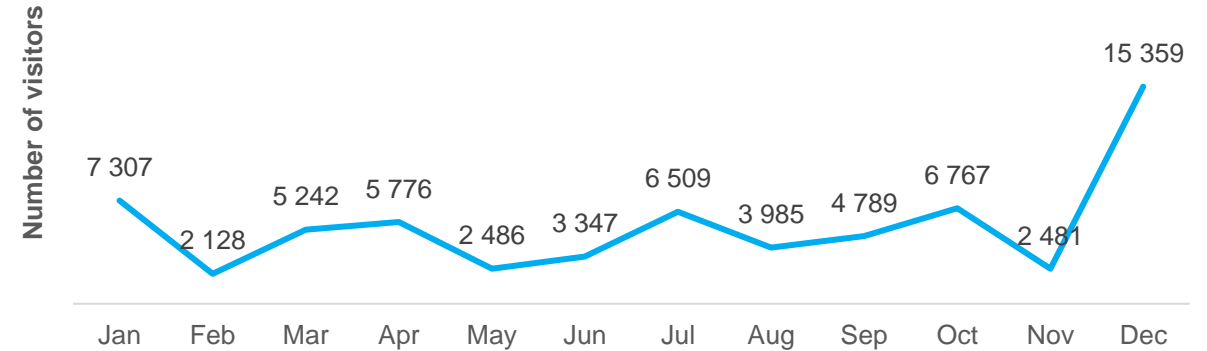


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
■ Cango Caves Total Visitors	8 466	4 044	8 595	9 620	6 474	7 047	10 669	9 391	9 985	16 150	12 148	21 952
■ Tsitsikamma National Park	24 225	11 331	17 300	16 411	8 990	7 149	13 818	16 181	14 793	26 629	22 438	32 445
■ Wilderness National Park	15 668	8 047	9 323	8 251	3 604	3 095	5 383	4 493	5 750	8 128	6 834	18 512
■ Knysna National Park	4 801	2 306	3 361	3 382	1 830	1 762	3 670	2 411	5 963	3 364	2 381	5 728

## 2. Garden Route & Klein Karoo Attractions

- Cango Caves welcomed a total of 124 541 visitors over the period January to December 2022. The highest recorded number of visitors occurred in December with 21 952 tourists visiting the attraction.
- United Kingdom, Germany and India ranked as the top three international source markets to Cango Caves in 2022. The month of January alone welcomed over 9 000 travellers from the United Kingdom. South Africa remained the lead source market, with the highest visitor numbers noted in December (15 359) and January (7 307).

SOUTH AFRICAN VISITORS TO CANGO CAVES, 2022



OVERSEAS SOURCE MARKETS TO CANGO CAVES, JAN-DEC 2022

Source Markets	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
United Kingdom	9 606	350	853	762	548	404	457	740	1 032	1 664	1 718	892	19 026
Germany	263	756	1 352	1 368	353	233	463	764	1 112	2 570	3 531	1 559	14 324
India	16	40	91	145	2 271	2 199	1 022	614	772	1 706	1 402	1 102	11 380
Holland	108	129	177	429	102	124	804	1 417	792	982	893	704	6 661
United States	137	119	202	277	217	414	251	424	509	371	448	515	3 884
Nordics	718	18	75	61	22	7	11	8	52	114	154	196	1 436
France	29	33	51	111	39	37	84	87	91	229	123	183	1 097
Asia	28	13	14	45	21	26	66	21	32	57	50	84	457

# Visitor Trends Mobile Location Data Insights

# 3. GR & KK Mobile Location Data Insights

## • What is mobile location data?

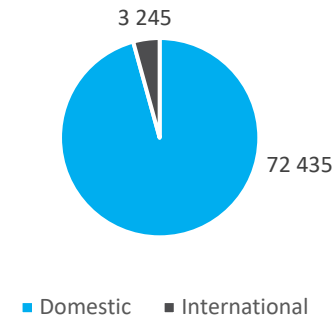
- Geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can opt into location sharing (or choose not to opt in). When they opt in, 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.

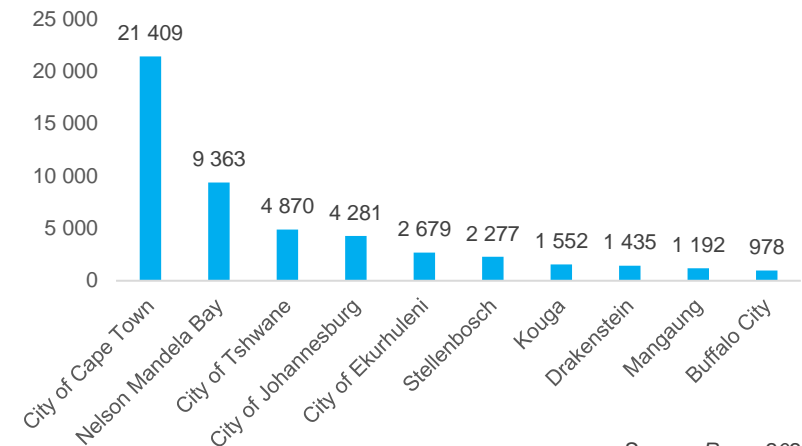
The insights in this report represents mobile location data from a sample of **72 435 domestic** and **3 245 international** tourists who visited the Garden Route & Klein Karoo in 2022. Within the domestic data set, 21 490 of the sampled tourists were from the City of Cape Town and from the international sampled tourists the United Kingdom (672) had the highest visitor numbers.

Sample Size



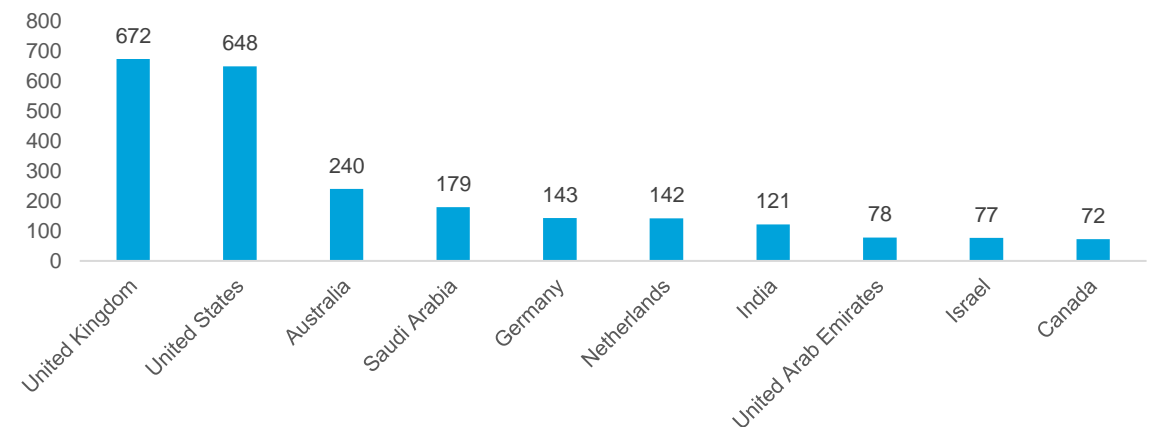
Source: Rove, 2023

Top 10 Origin Municipalities of Domestic Sample Size in 2022



Source: Rove, 2023

Top 10 Origin Countries of International Sample Size in 2022

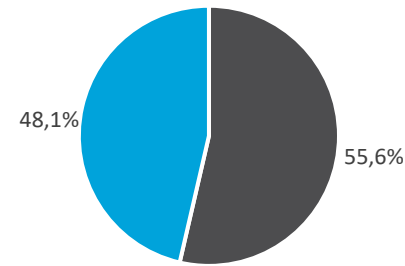


Source: Rove, 2023

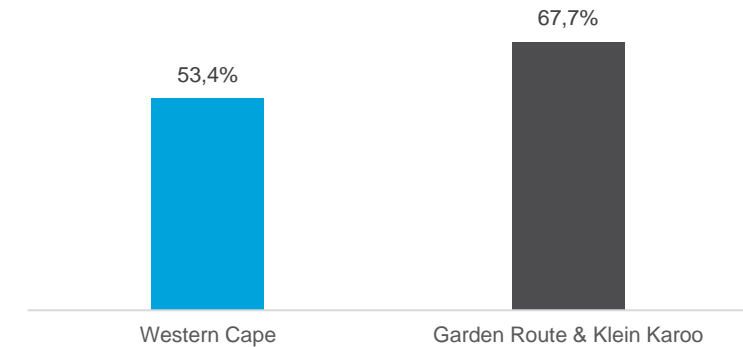
# 3.1. Mobile Insights: Domestic Visitor Trends

- On average, domestic visitors spent 3.3 days in the Garden Route & Klein Karoo which is longer than the general average for the province (2.5 days).
- Close to 70% of the sampled domestic tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (53.4%).
- Over 50% of the domestic tourists visiting the Garden Route & Klein Karoo were repeat visitors. This is a slightly higher repeater rate than the general average for the province (48.1%).

Percent of Repeat Visitors, 2022 (Domestic)

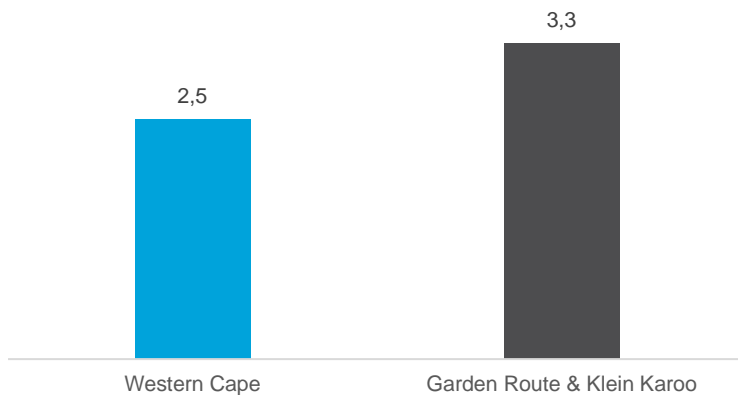


Percent of Sample who Stayed Overnight, 2022 (Domestic)

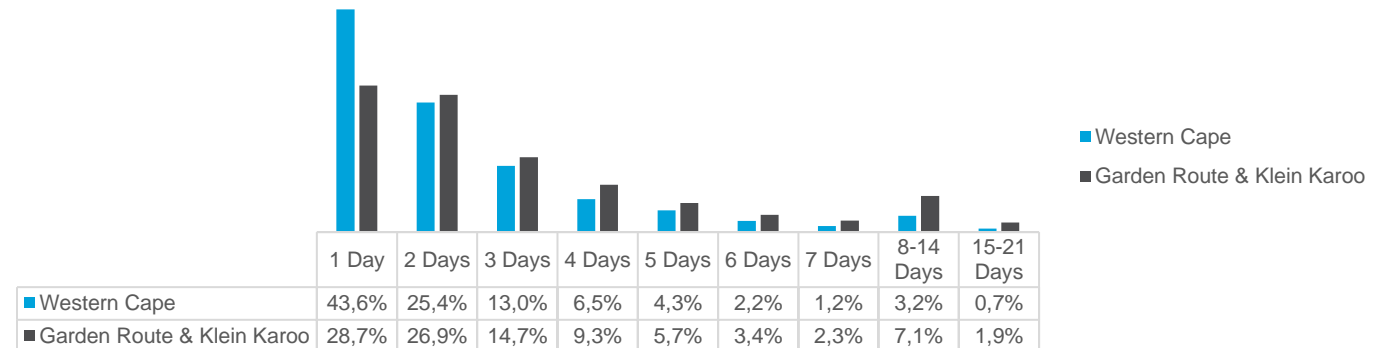


Source: Rove, 2023

Average Length of Stay, 2022 (Domestic)



Average Length of Stay (number of days), 2022 (Domestic)



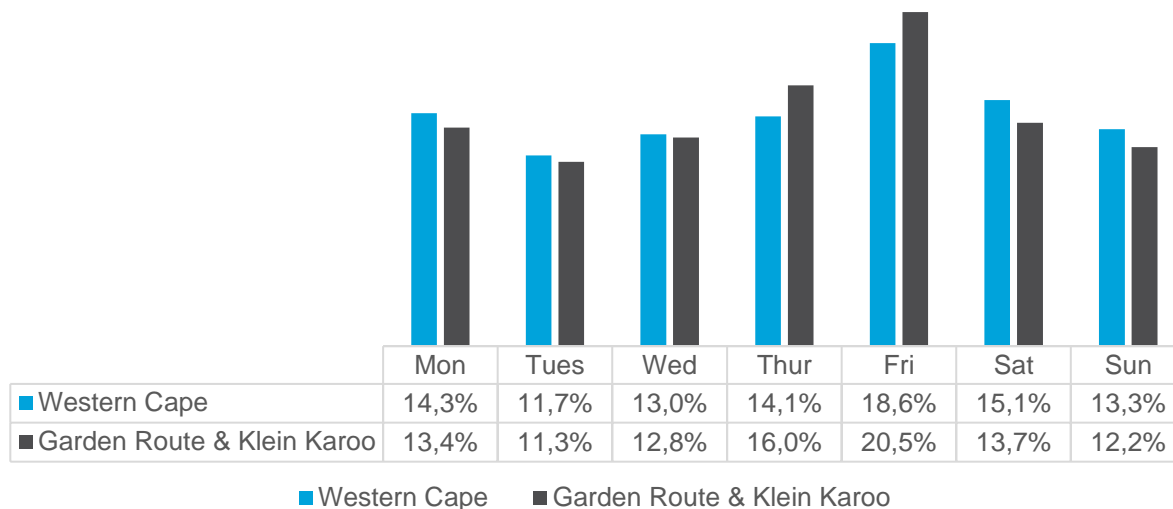
Source: Rove, 2023



# 3.1. Mobile Insights: Domestic Visitor Trends

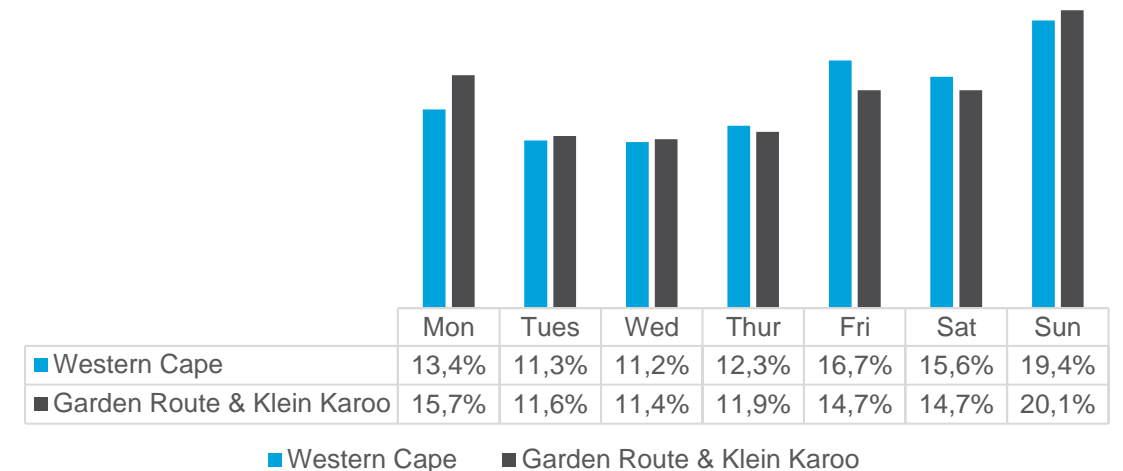
- Arrival days for domestic visitors to the Garden Route were largely received on weekends in 2022, with Friday receiving over 20% of those visitors. Departures from the region was largely seen on Sunday's (20.1%) or Monday's (15.7%).

Popular Arrival Days of the Week to GR & KK, 2022 (Domestic)



Source: Rove, 2023

Popular Departure Days of the Week to GR & KK, 2022 (Domestic)

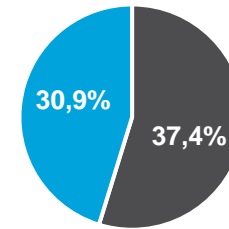


Source: Rove, 2023

# 3.2. Mobile Insights: International Visitor Trends

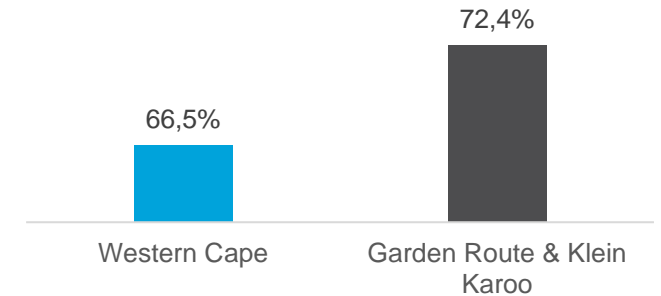
- On average, international visitors spent 3.2 days in the Garden Route & Klein Karoo, a day longer than the general average for the province (3.1 days).
- Over 70% of the sampled international tourists stayed overnight in the Garden Route & Klein Karoo, which is also higher than the general average for the province (66.5%) in 2022.
- Just over a quarter of international tourists to the Garden Route & Klein Karoo were repeat visitors, which is a slightly lower rate than the general average for the province (37.4%) recorded in 2022.

Percent of Repeat Visitors in 2022 (International)



■ Western Cape ■ Garden Route & Klein Karoo

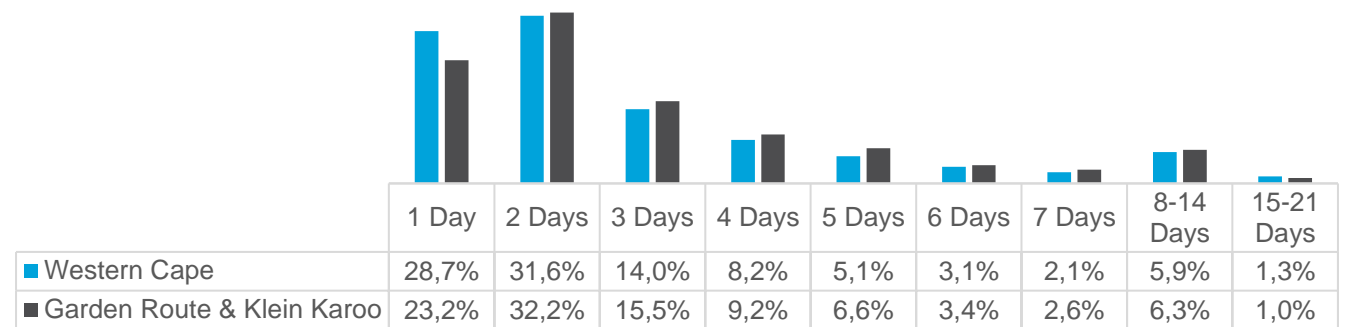
Percentage Sample who Stayed Overnight in 2022 (International)



Average Length of Stay, 2022 (International)



Average Length of Stay, 2022 (International)

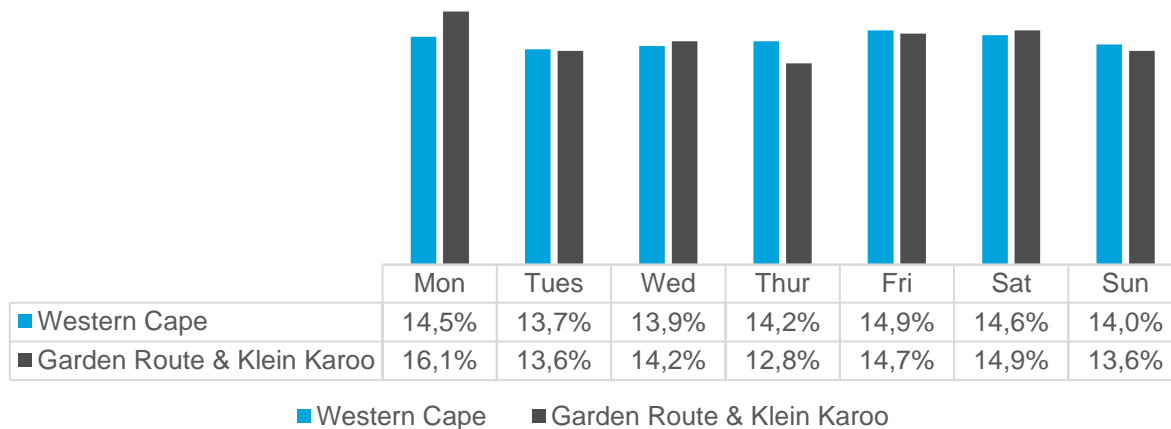


■ Western Cape ■ Garden Route & Klein Karoo

## 3.2. Mobile Insights: International Visitor Trends

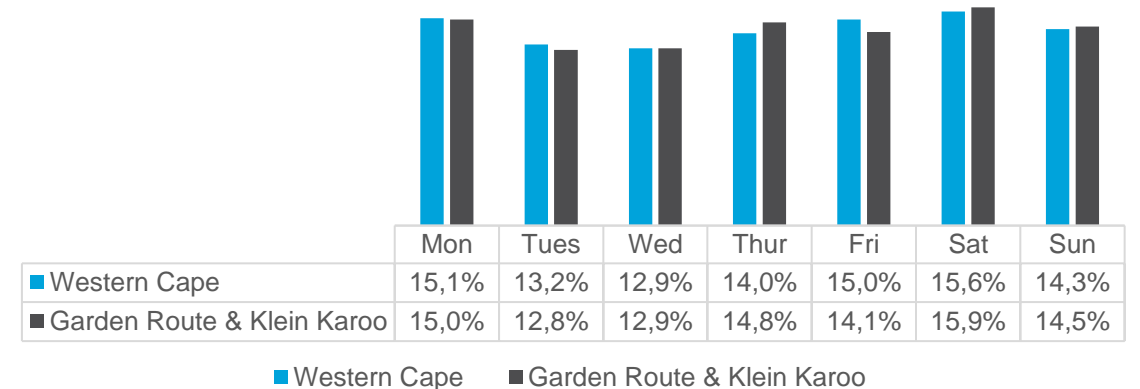
- International visitors to the Garden Route & Klein Karoo were most likely to arrive on Mondays (16.1%) and Fridays (14.9%).
- Their departure days in 2022 were recorded on Saturday or Monday.
- The Western Cape also had a similar trend with tourists arriving on Fridays and departing on Saturdays or Mondays.

Popular Arrival Days of the Week to GR & KK in 2022 (International)



Source: Rove, 2023

Popular Departure Days of the Week in GR & KK, 2022 (International)

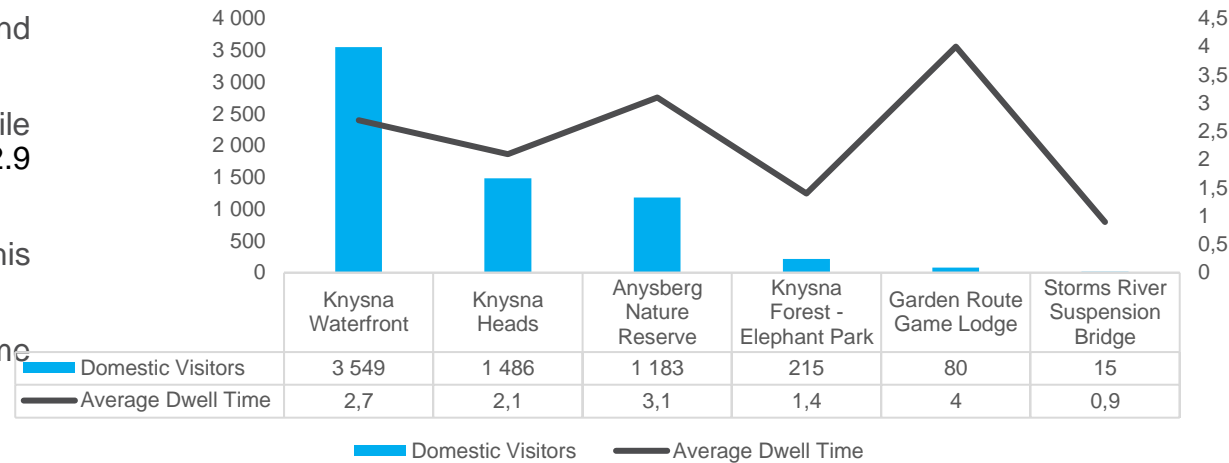


Source: Rove, 2023

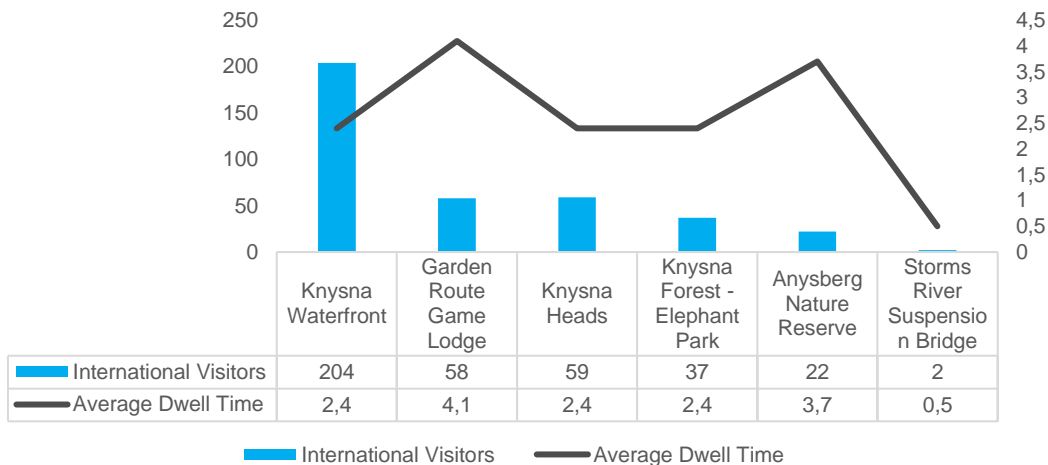
# 3.3. Points of Interest (POIs) Visited

- The Knysna Waterfront was a popular attraction for international, domestic and local tourists in 2022.
- Domestic visitors spent on average 2.7 hours at the Knysna Waterfront while International tourists spent slightly fewer hours (2.4) and local visitors spent 2.9 hours.
- Knysna Heads was the second most visited POI for domestic tourists. This was followed by the Knysna Heads which attracted 1 486 visitors.
- Tourists also visited the Knysna Forest – Elephant, the Garden Route Game Lodge and the Storms River Suspension bridge.

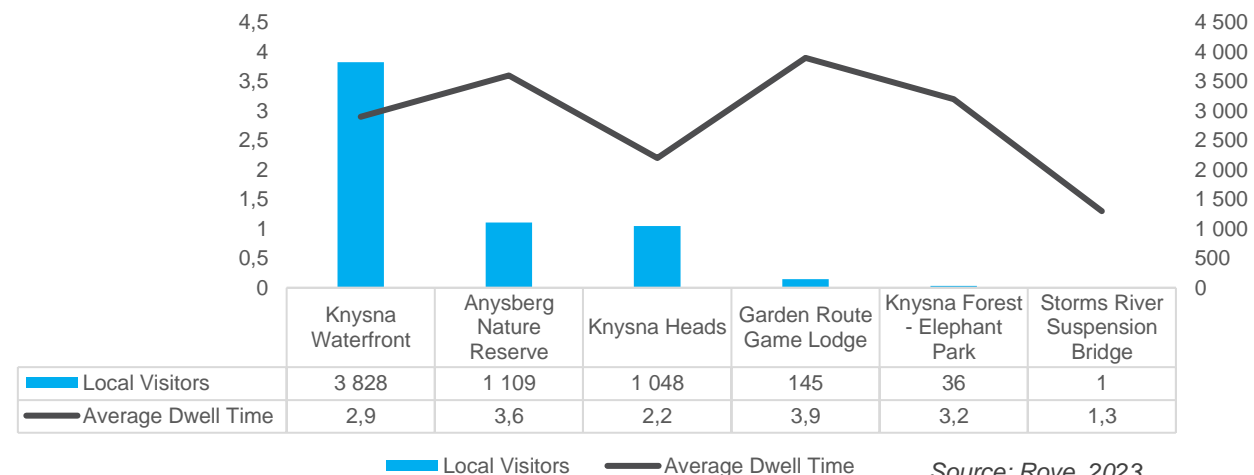
POIs Visited by Domestic Tourists in 2022



POIs Visited by International Tourists in 2022



POIs Visited by Local Tourists in 2022



# Visitor Trends for Select Towns in Garden Route & Klein Karoo

## Mobile Location Data Insights

**WESGRO**

cape town & western cape  
tourism, trade, investment, film

An Inspiring Place To Do Business

# 4.1. Domestic & International Sample Size

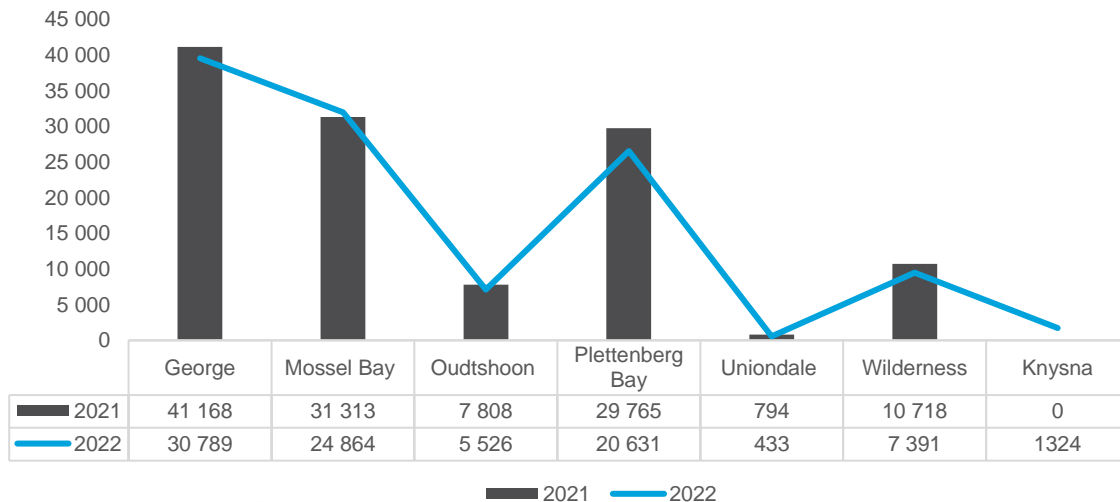
Among the seven towns analysed below for the period 2021 and 2022, George had the highest number of domestic and international markets.

This was closely followed by Mossel bay with 24 864 tourists and Plettenberg Bay (20 631).

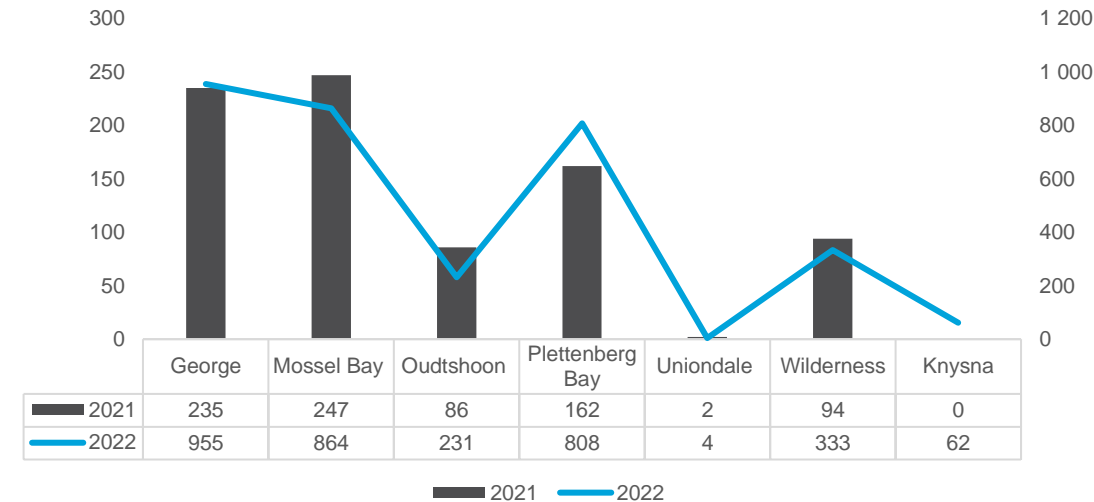


A steady growth in international tourists can be observed in 2022, in relation to numbers in 2021.

Domestic Sample Size (2021-2022)



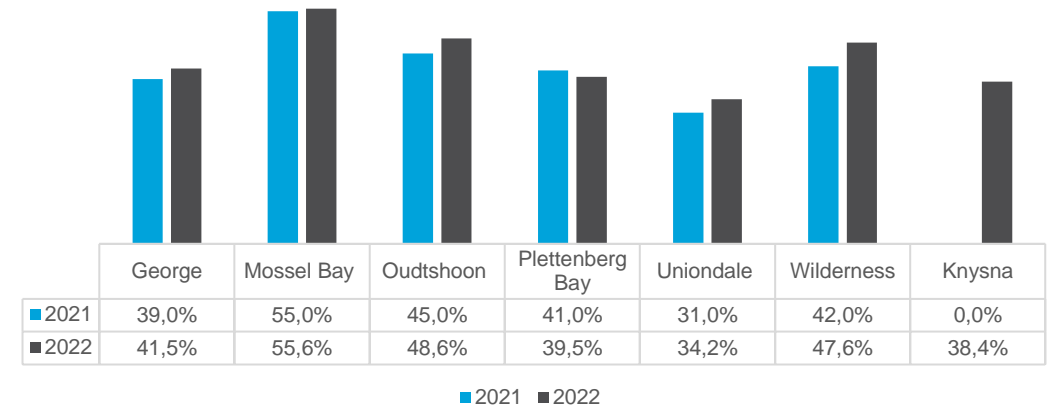
International Sample Size (2021-2022)



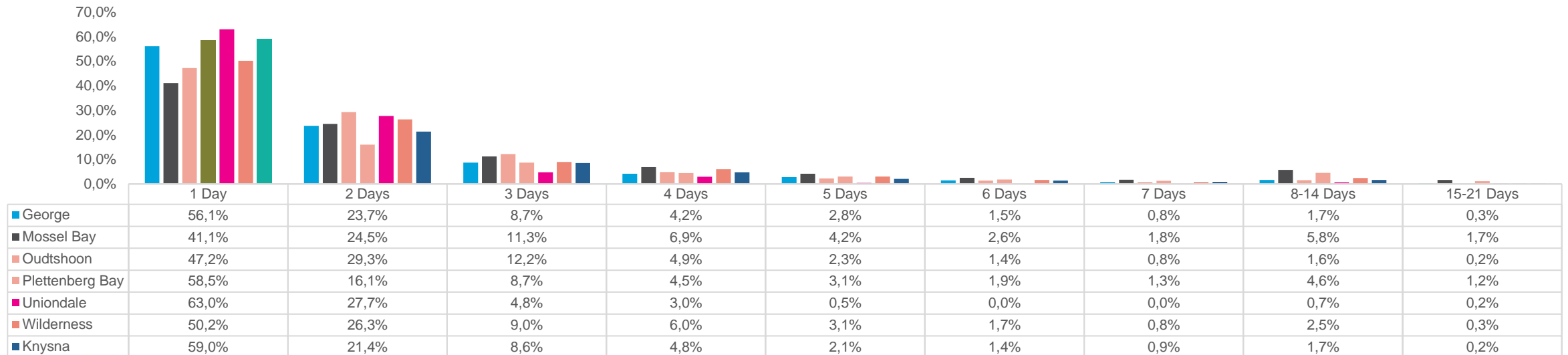
# 4.2. Day and Overnight Visitors: Domestic

- The greatest share of visitors stayed overnight in Mossel Bay both 2021 (55%) and 2022 (56%). This was closely followed by Oudtshoorn and Plettenberg Bay.
- The average length of stay for domestic visitors in the Garden Route and Klein Karoo was one day. Only a few travellers stayed for more than two days.

% Domestic Overnight Visitors (2021 - 2022)



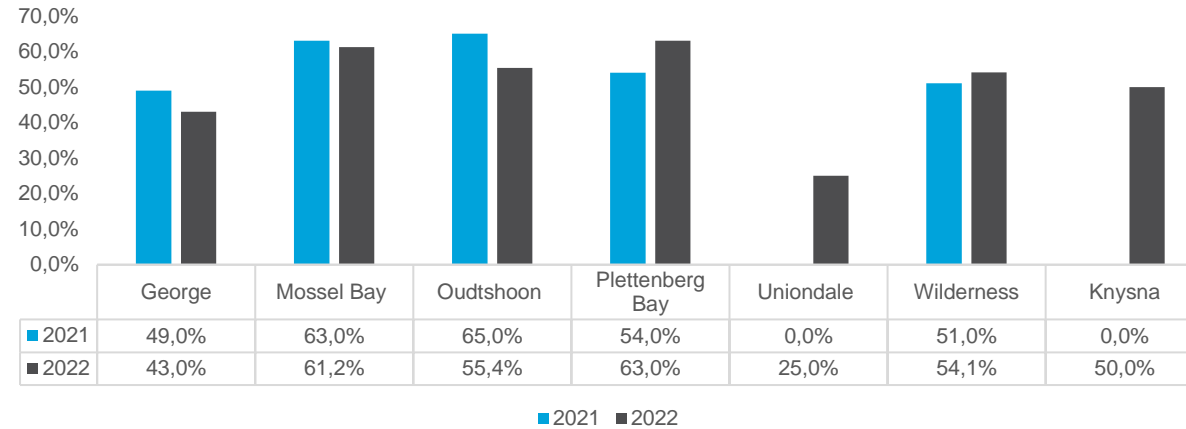
Average Length of Stay, 2022 (Domestic)



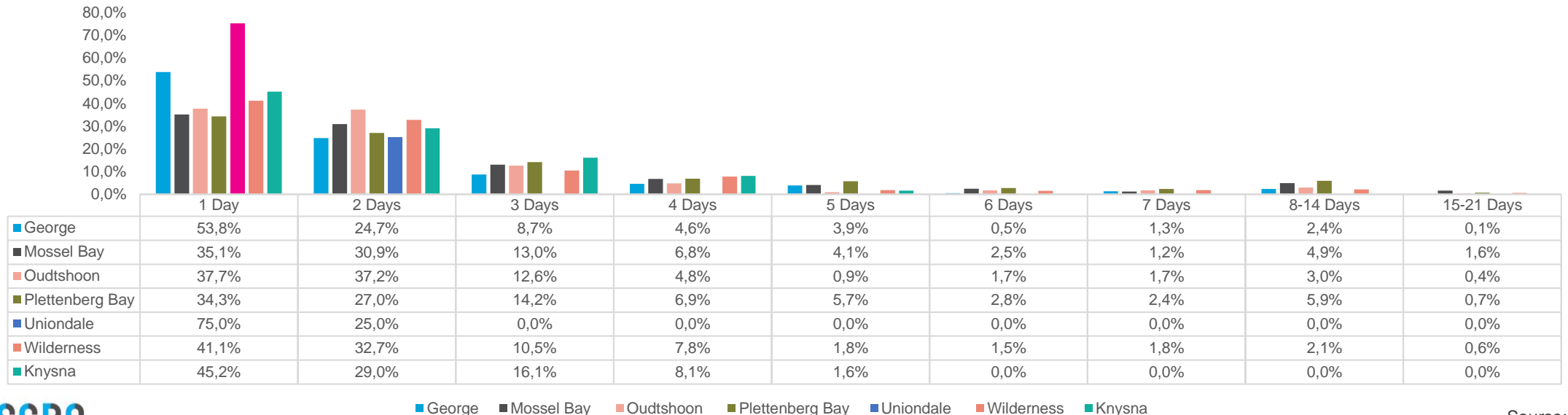
# 4.3. Day & Overnight Visitors: International

- In 2022 Plettenberg Bay received a 63% share of international overnight visitors. Mossel Bay and Oudtshoorn were also popular destinations for overnight visitors.
- International visitors to the towns listed on the graph below, spent between one to three days in the region, as did domestic visitors.

% International Overnight Visitors (2021 - 2022)



Average Length of Stay, 2022 (International)

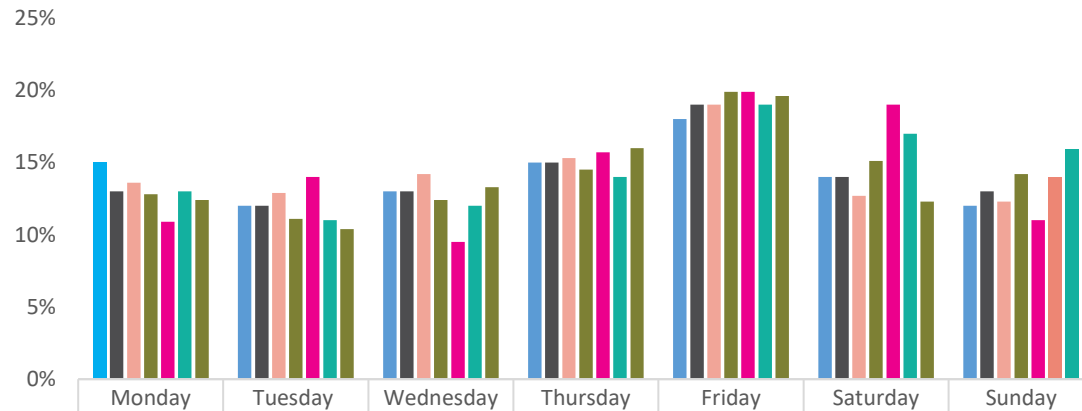




# 4.4. Popular Arrival & Departure Days of the Week: Domestic

- Friday was the most popular arrival day for domestic visitors to George, with 18% of visitors arriving on this day. The second most popular arrival days were Thursdays and Mondays. Some 15% of visitors arrived on these days and when looking at the towns individually most arrival days were Thursday, Fridays and Saturdays. Regarding departures, visitors mostly left between Thursday and Sunday.

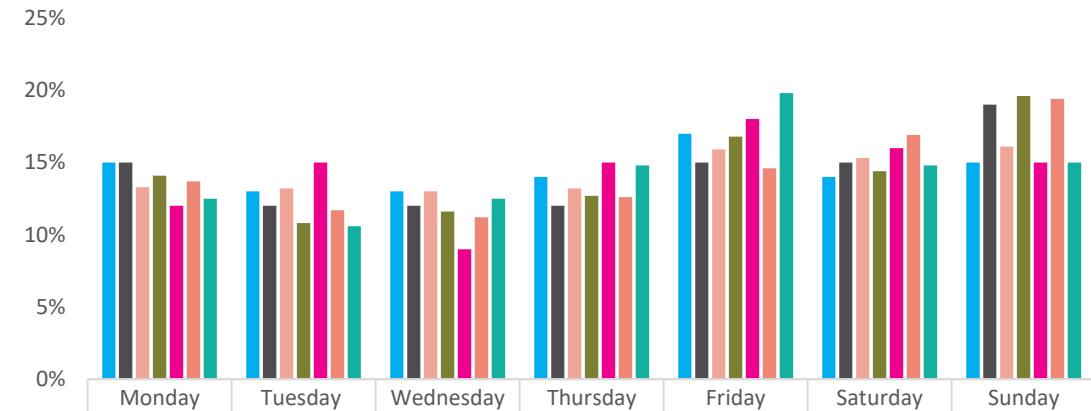
Popular Arrival Days of the Week, 2022 (Domestic)



George	15%	12%	13%	15%	18%	14%	12%
Mossel Bay	13%	12%	13%	15%	19%	14%	13%
Oudtshoorn	14%	13%	14%	15%	19%	13%	12%
Plettenberg Bay	13%	11%	12%	15%	20%	15%	14%
Uniondale	11%	14%	10%	16%	20%	19%	11%
Wilderness	13%	11%	12%	14%	19%	17%	14%
Knysna	12%	10%	13%	16%	20%	12%	16%

George Mossel Bay Oudtshoorn Plettenberg Bay Uniondale Wilderness Knysna

Popular Departure Days, 2022 (Domestic)



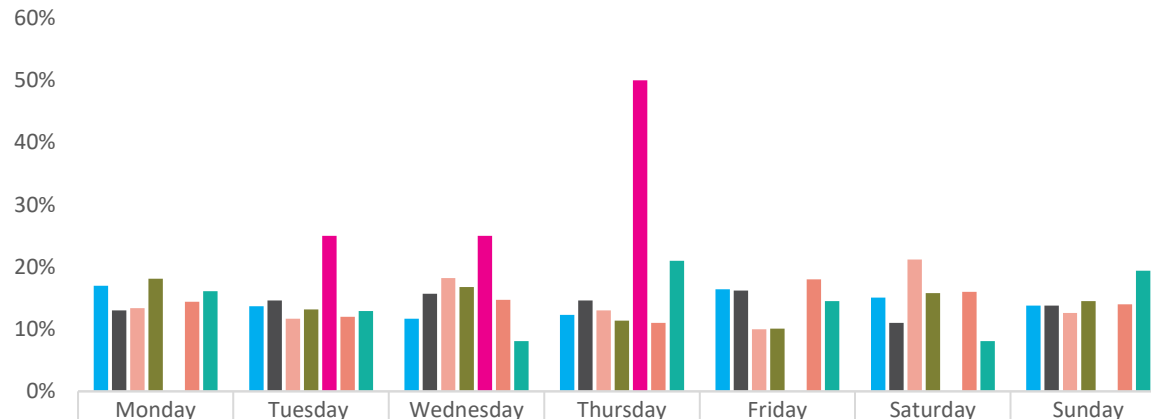
George	15%	13%	13%	14%	17%	14%	15%
Mossel Bay	15%	12%	12%	12%	15%	15%	19%
Oudtshoorn	13%	13%	13%	13%	16%	15%	16%
Plettenberg Bay	14%	11%	12%	13%	17%	14%	20%
Uniondale	12%	15%	9%	15%	18%	16%	15%
Wilderness	14%	12%	11%	13%	15%	17%	19%
Knysna	13%	11%	13%	15%	20%	15%	15%

George Mossel Bay Oudtshoorn Plettenberg Bay Uniondale Wilderness Knysna

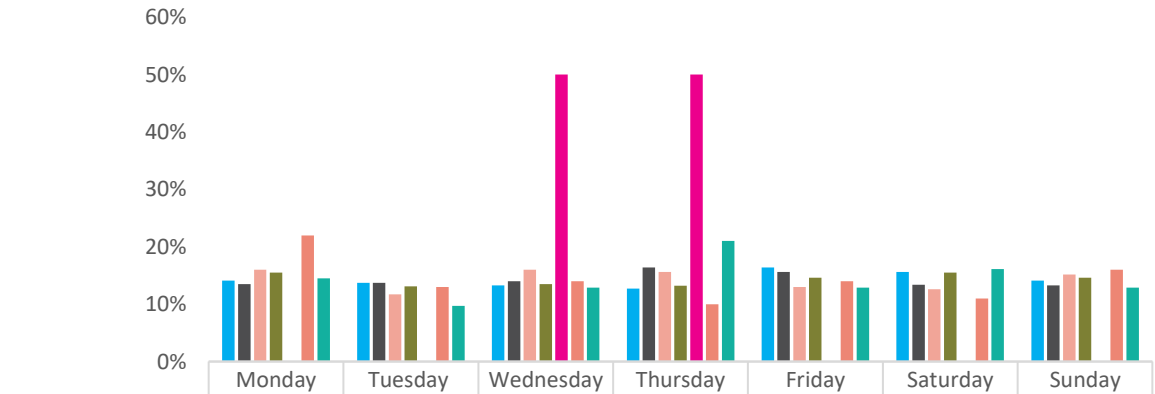
# 4.5. Popular Arrival & Departure Days of the Week: International

- For international visitors in 2022, Wednesday was the most popular arrival day, followed by Friday and Monday. Wilderness, Oudtshoon and Plettenberg Bay had a high number of tourists arriving on Mondays.
- Departure days for the above-mentioned towns were generally Mondays, Thursdays and Saturdays.

Popular Arrival Days of the Week, 2022 (International)



Popular Departure Days, 2022 (International)



George Mossel Bay Oudtshoon Plettenberg Bay Uniondale Wilderness Knysna

George Mossel Bay Oudtshoon Plettenberg Bay Uniondale Wilderness Knysna

# 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

<b>Primary Study Geography</b>	<b>Tourists are defined as:</b>
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.
<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 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.</li> </ul>	
<b>Secondary Study Geography</b>	<b>Tourists are defined as:</b>
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.
<b>Notes and Considerations:</b> <ul style="list-style-type: none"> <li>Residents of a city are not counted as a tourist of the city</li> <li>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</li> </ul>	
<b>Point of Interest Study Geography</b>	<b>Tourists are defined as:</b>
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> <li>Filter out people who work at the Tourism Experience.</li> </ul>	
<b>What are Tourist Segments?</b>	
<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 Western Cape</li> <li><b>International Tourists:</b> Tourists who reside outside of South Africa</li> </ul>	

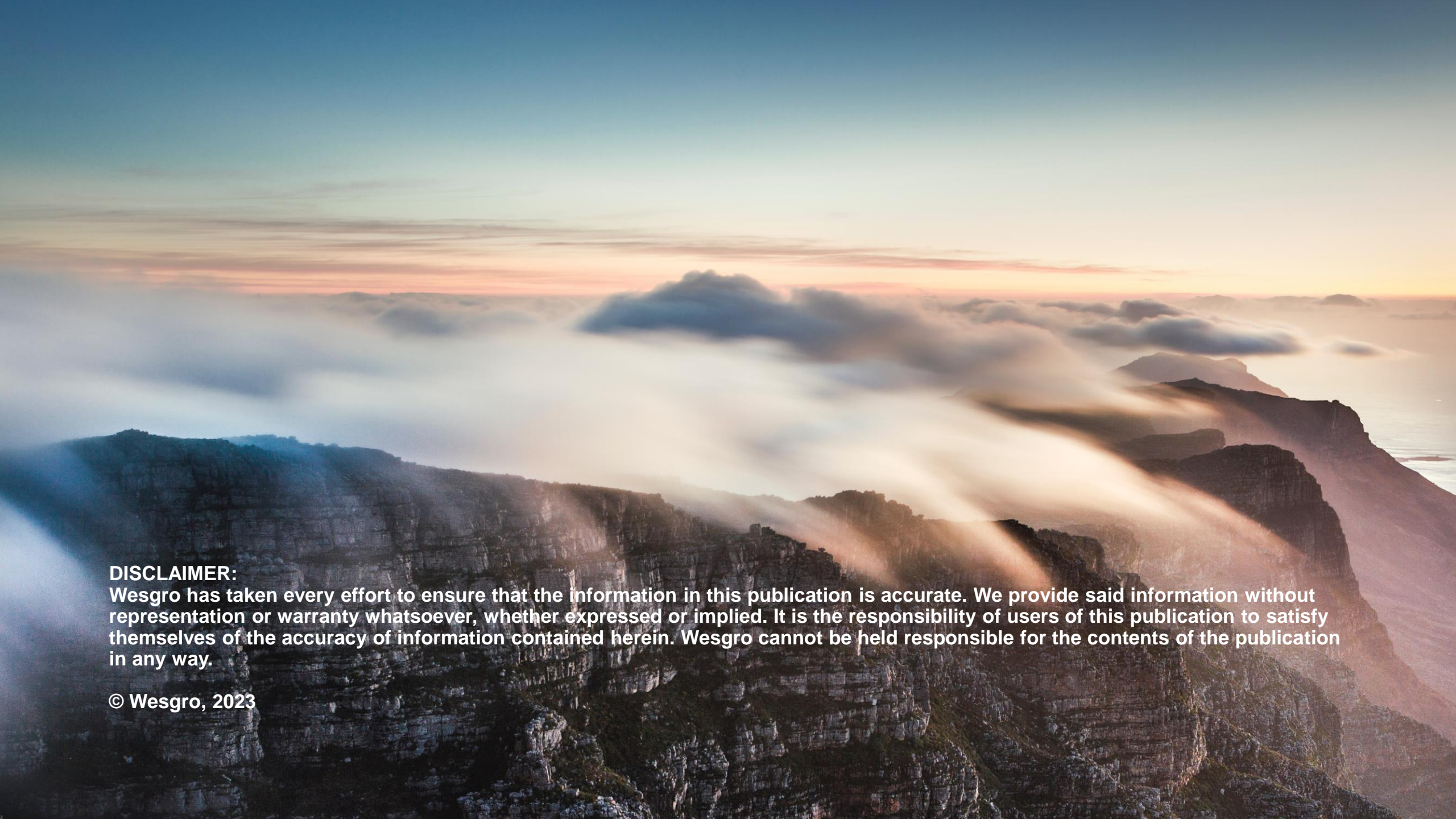
# Glossary of Key Terms

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 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

# 5. List of Sources

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



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