



Garden Route & Klein Karoo

January – June 2023

Tourism Trends

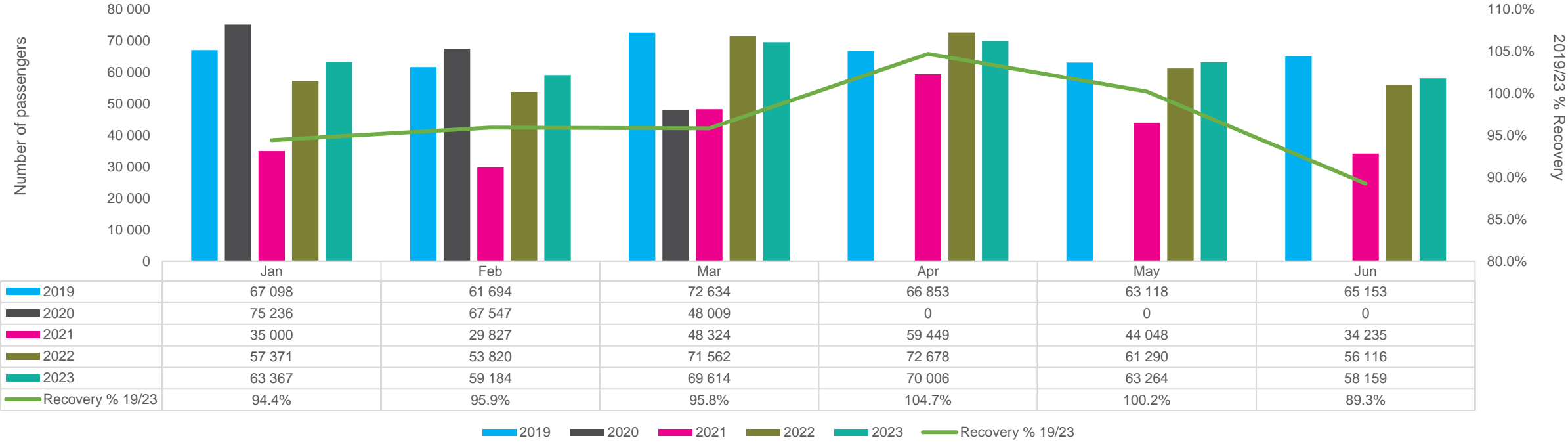
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1. George Airport Passenger Movement

- George Airport recorded 383,594 two-way passengers from January to June 2023, representing a recovery of 97% when compared to the January to June 2019 performance.
- The number of passengers recorded in April 2023 increased by 104.7% compared to the number of passengers recorded in April 2019, and similarly, May 2023 saw a recovery of 100.2% against passenger levels recorded pre-pandemic in May 2019. These figures can be seen in Figure 1.

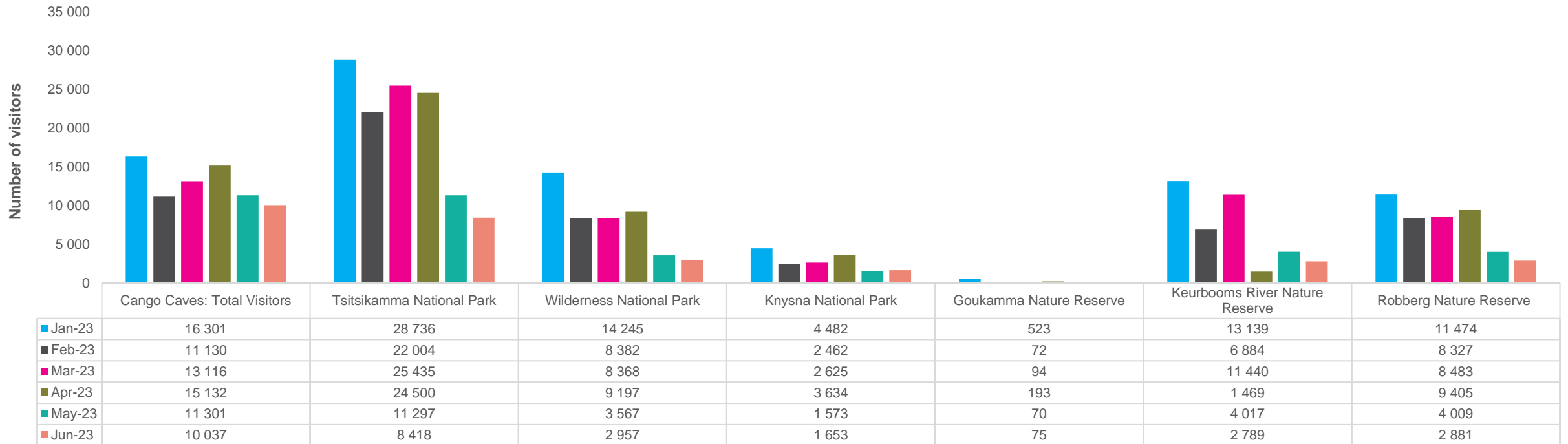
Figure 1: Two-way Passenger Movement Through George Airport, Jan-Jun 2023



2. Garden Route & Klein Karoo Attractions

- Participating Garden Route and Klein Karoo attractions (listed in Figure 2) attracted a total of 345,896 visitors between January and June in 2023. Tsitsikamma National Park accounted for the greatest number of visitors.
- During the period under review, most tourists visited during the summer / autumn months from January to April, and a drop in numbers was seen during the colder months starting from May 2023.

Figure 2: Visitors to Participating Garden Route & Klein Karoo Attractions, Jan-Jun 2023



2. Garden Route & Klein Karoo Attractions

- The Cango Caves welcomed a total of 77 017 visitors from January to June 2023. International tourists, numbering 49 025 exceeded domestic visitors 27 965 to the Cango Caves.
- Figure 3 shows that the greatest number of domestic visitors were seen in January 7 722 and April 7 496.
- India, Germany and the United Kingdom ranked as the top three international source markets for visitors to the Cango Caves between January and June 2023, as shown in Table 1.

Figure 3: South African Visitors to Cango Caves, Jan-Jun 2023

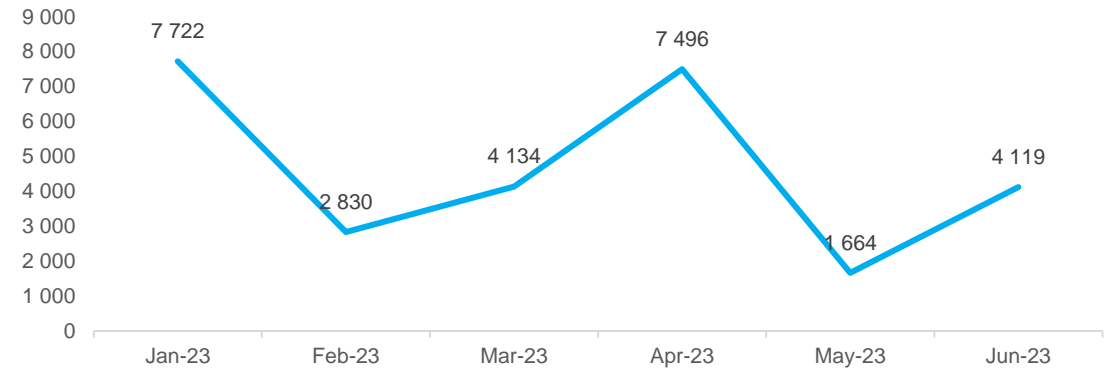


Table 1: Overseas Source Markets to Cango Caves, Jan-Jun 2023

Source Markets	Jan	Feb	Mar	Apr	May	Jun
India	718	491	600	1 144	5 911	3 573
Germany	2 139	2 451	3 527	2 348	767	297
United Kingdom	1 442	1 697	1 440	1 442	1 066	645
Holland	887	712	771	681	389	189
United States	566	651	668	562	627	411
France	228	301	262	146	73	107
Asia	109	51	114	147	99	75
Nordics	277	238	38	49	27	72
Total	6 366	6 592	7 420	6 519	8 959	5 369

Visitor Trends Mobile Location Data Insights

3. GR & KK Mobile Location Data Insights

- Figures 4,5 and 6 demonstrate that the insights in this report represent mobile location data from a sample of **46,524 domestic** and **893 international** tourists who visited the Garden Route & Klein Karoo between January and June 2023.
- Within the domestic data set, **15,694** of the sampled tourists were from the City of Cape Town, whereas the greatest number of international visitors (260) were from the United States.

Figure 4: Sample Size of Domestic and International Visitors to the Garden Route & Klein Karoo

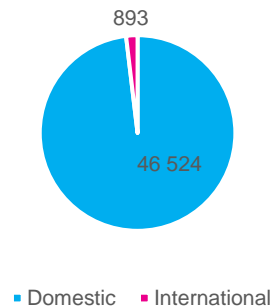


Figure 5: Sample Size of Domestic Visitors from Top 10 Municipalities of Origin, Jan-Jun 2023

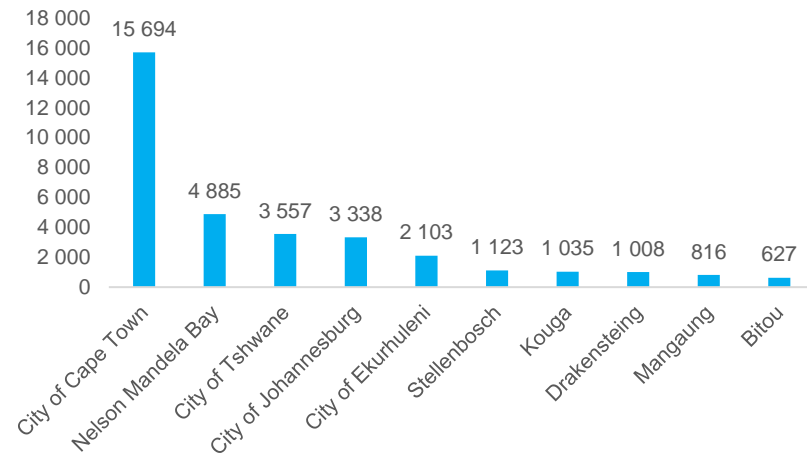
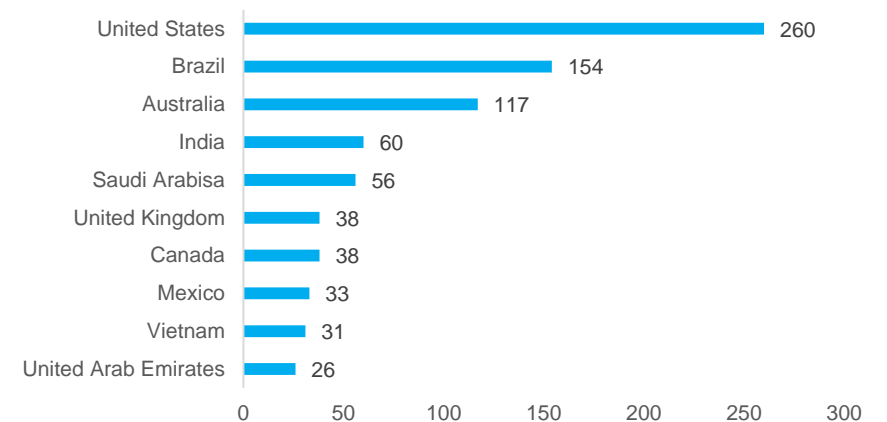


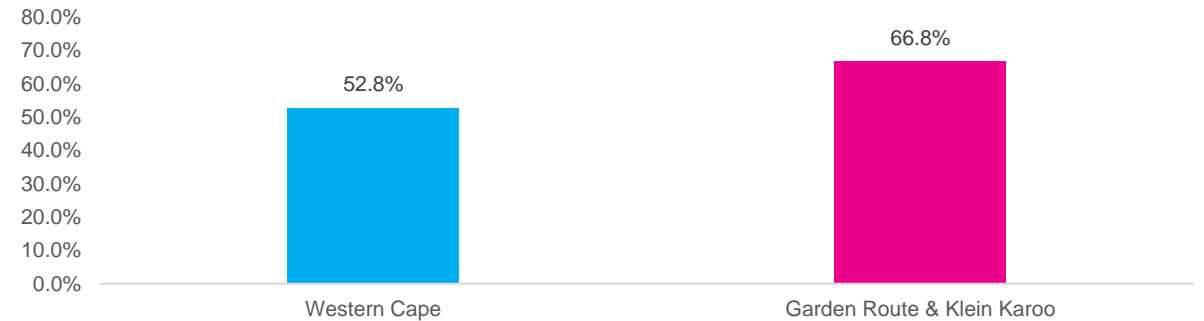
Figure 6: Sample Size of International Visitors from Top 10 Countries of Origin, Jan - Jun 2023



3.1. Mobile Insights: Domestic Visitor Trends

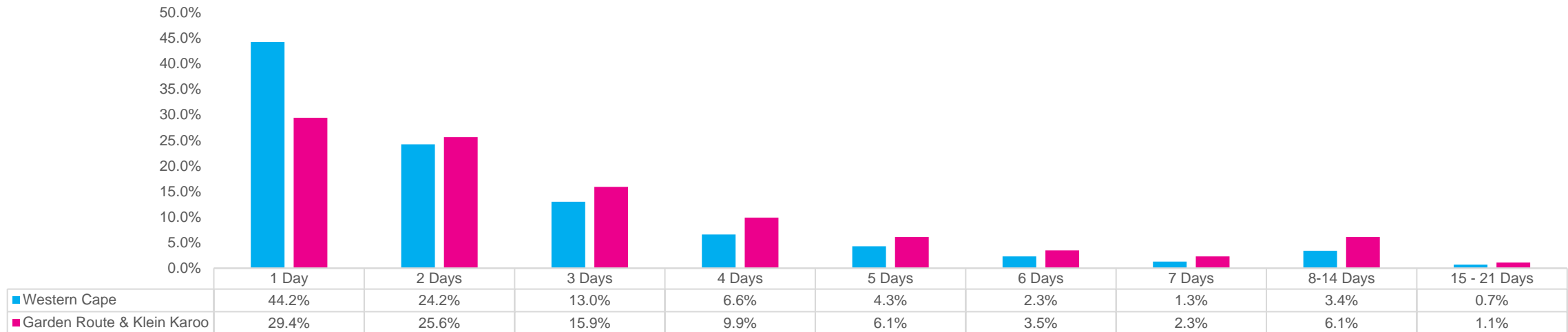
- Figure 7, shows that over 60% of the sampled domestic tourists stayed overnight in the Garden Route & Klein Karoo, which is higher than the general average for the province (52.8%).
- On average, domestic visitors spent between one and three days in the Garden Route & Klein Karoo as well as in the Western Cape. This is shown below in Figure 8.

Figure 7: Percentage of Sample Who Stayed Overnight in the Western Cape and in the Garden Route & Klein Karoo, Jan-Jun 2023
(Domestic)



Source: Rove, 2023

Figure 8: Average Length of Stay Jan-Jun 2023
(Domestic)



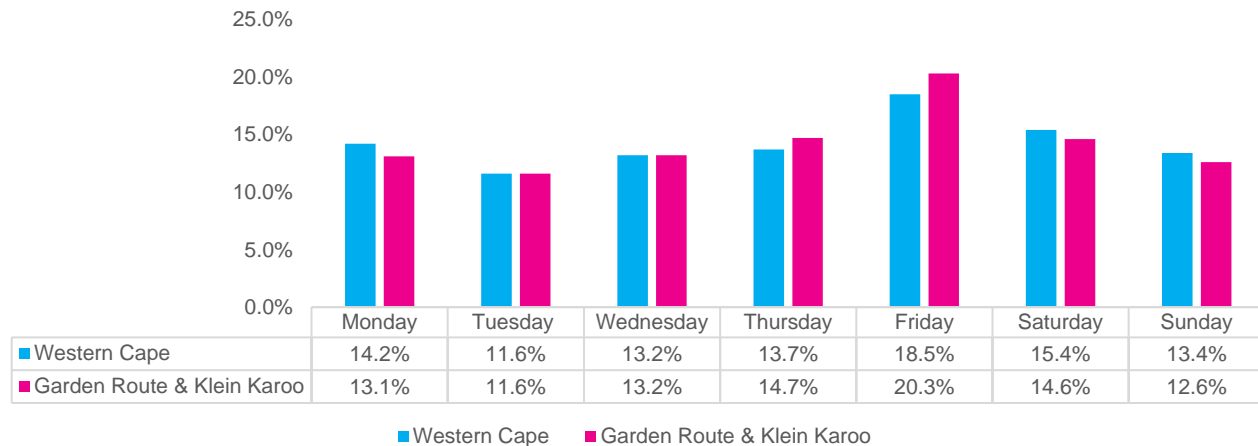
■ Western Cape ■ Garden Route & Klein Karoo

Source: Rove, 2023

3.1. Mobile Insights: Domestic Visitor Trends

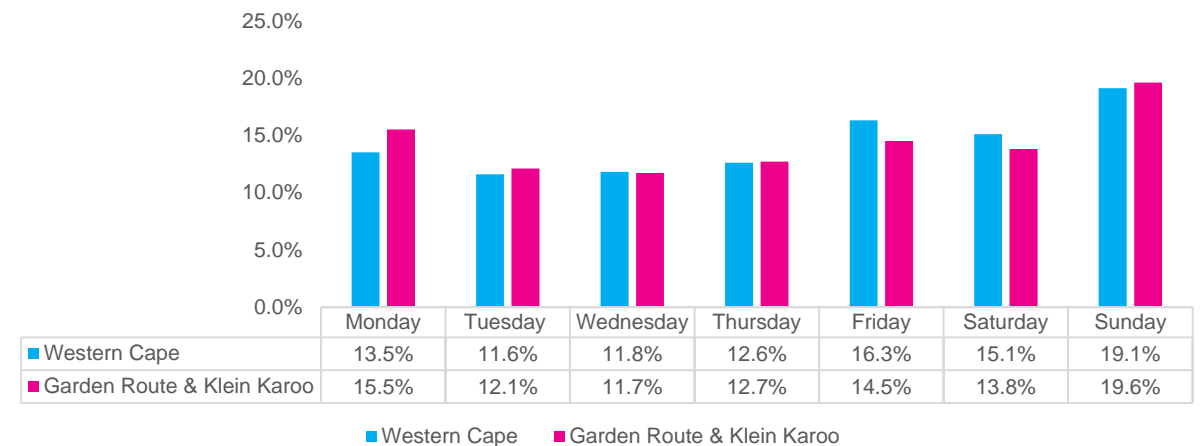
- Figure 9 shows that arrival days for domestic visitors to the Western Cape and Garden Route & Klein Karoo were largely received over weekends from January to June 2023, with Fridays being the most popular day for arrivals.
- Departures from the region were mainly on Sundays (19.6%) and Mondays (15.5%) as seen in figure 10.

Figure 9: Popular **Arrival** Days of the Week for Visitors to the Western Cape and in the Garden Route & Klein Karoo, Jan-Jun 2023 **(Domestic)**



Source: Rove, 2023

Figure 10: Popular **Departure** Days of the Week to the Western Cape and in the Garden Route & Klein Karoo, Jan-Jun 2023 **(Domestic)**



Source: Rove, 2023

3.2. Mobile Insights: International Visitor Trends

- Figure 11 shows that 71% of the sample were international tourists who stayed in the Garden Route & Klein Karoo, whereas the Western Cape attracted 63.1% of international visitors.
- The average length of stay from this market was set between one and two days for both the Western Cape and the Garden Route & Klein Karoo. However, a few visitors managed to stay for more than two weeks in the province as well as in the region. This can be seen in Figure 12.

Figure 11: Percentage of Sample who Stayed in the Western Cape and in the Garden Route & Klein Karoo, Jan-Jun 2023
(International)

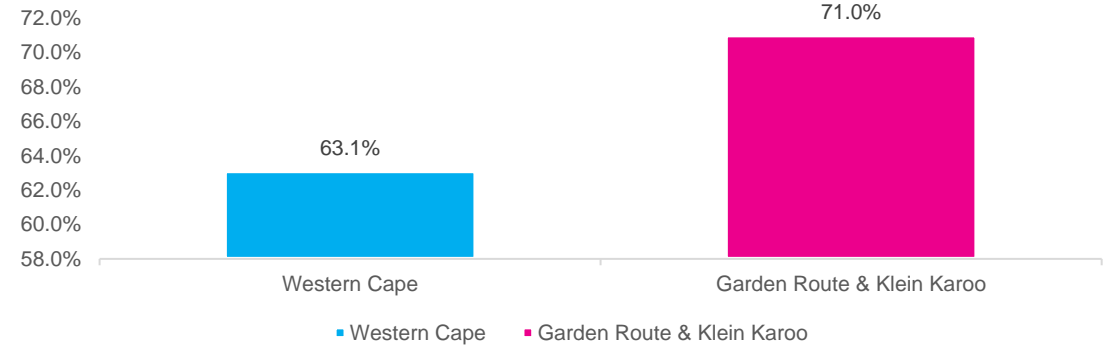
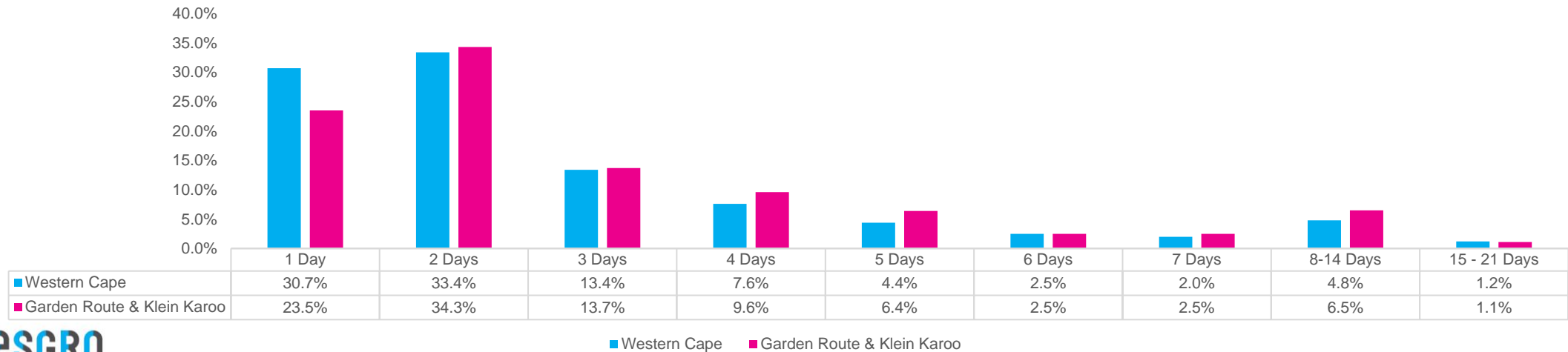


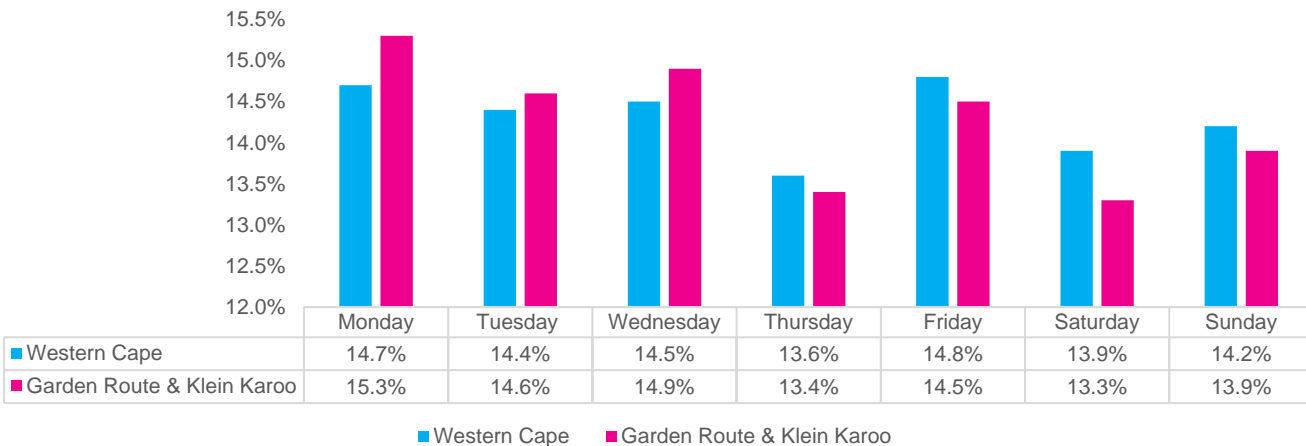
Figure 12: Average Length of stay, Jan-Jun 2023
(International)



3.2. Mobile Insights: International Visitor Trends

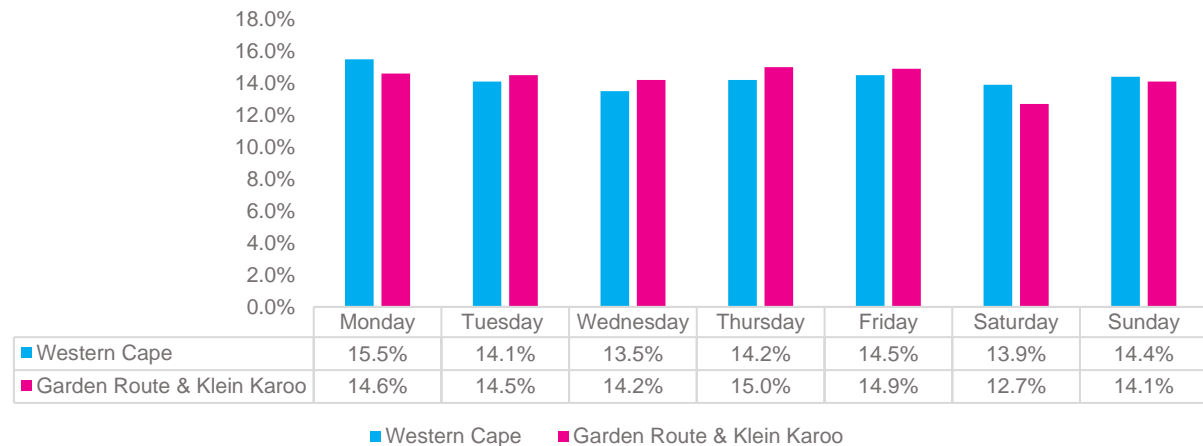
- Arrival days for international visitors to the Garden Route & Klein Karoo were distributed throughout the week with the greatest number of arrivals seen on Fridays (14.8%) as well as on Mondays (14.7%). This can be seen in Figure 13.
- Figure 14 shows the popular departure days, which were fairly evenly distributed throughout the week.
- The Western Cape also had similar trends with international tourists arriving mainly on Mondays and Fridays and departing on similar days to those leaving the Garden Route & Klein Karoo.

Figure 13: Popular **Arrival** Days of the Week for Visitors to the Western Cape and the Garden Route & Klein Karoo, Jan-Jun 2023 *(International)*



Source: Rove, 2023

Figure 14: Popular **Departure** Days of the Week for Visitors Leaving the Western Cape and the Garden Route & Klein Karoo, Jan-Jun 2023 *(International)*



Source: Rove, 2023

3.3. Points of Interest (POIs) Visited

- Between January and June 2023, the Knysna Waterfront was the most popular attraction for international, domestic and local tourists as seen in figures 15,16 & 17. All sampled tourists who travelled to the Waterfront spent over two hours at the location.
- Anysberg Nature Reserve was the second most visited point of interest (POI) for local tourists. Some 881 locals visited the site, while Knysna Heads was the second most popular POI for domestic (815) and international (19) tourists.
- The figures below also show that tourists visited the Knysna Forest – Elephant Park, the Garden Route Game Lodge as well as the Storms River Suspension bridge.

Figure 15: POIs Visited by **Local** Tourists, Jan-Jun 2023

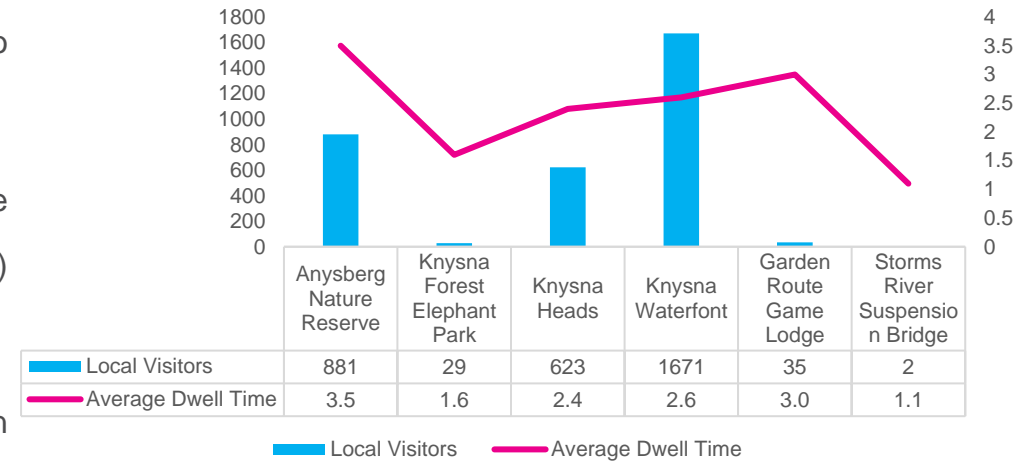


Figure 16: POIs Visited by **Domestic** Tourists, Jan-Jun 2023

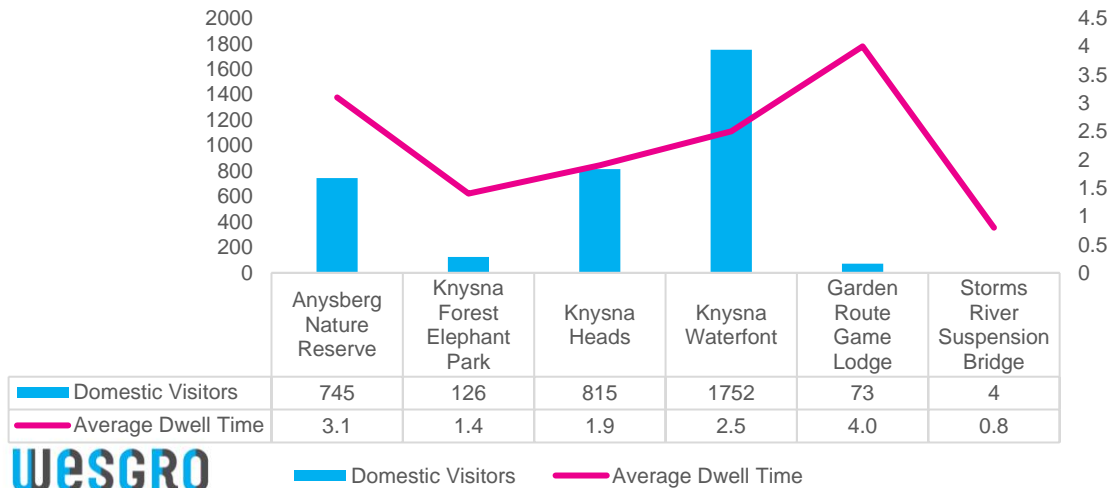
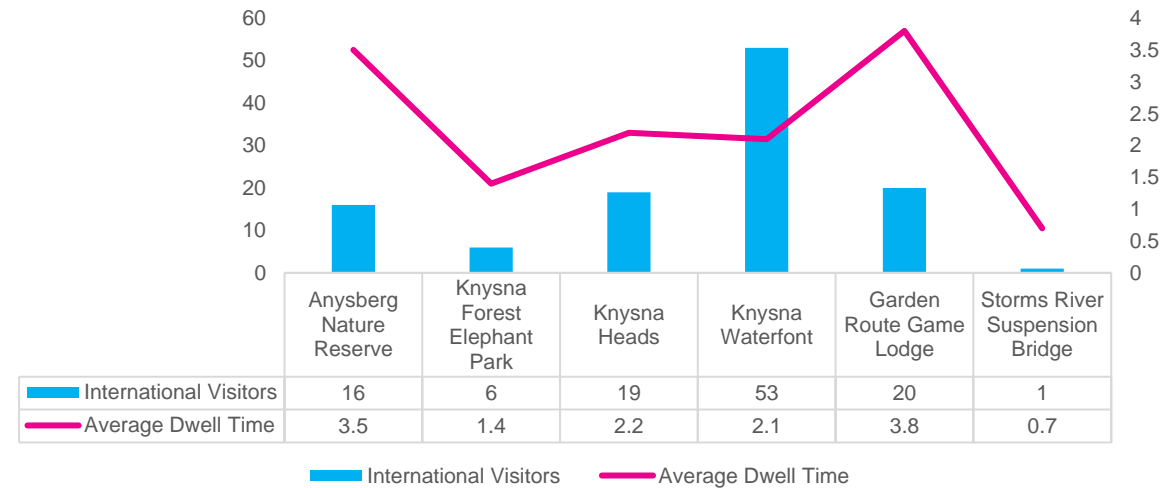


Figure 17: POIs Visited by **International** Tourists, Jan-Jan 2023



Visitor Trends for Select Towns in Garden Route & Klein Karoo

Mobile Location Data Insights

4.1. Domestic & International Sample Size

Among the seven towns analysed in Figures 18 and 19 for the period **January 2022 to June 2023**, George attracted the highest sample of domestic (20 866) and international (434) visitors.

This was closely followed by Knysna with (18 488) domestic tourists and Mossel Bay (17 450) as seen in figure 18.

Figure 19 further shows that the remaining towns had a decline in arrivals when compared to the same period (Jan-Jun) 2022.

Figure 18: **Domestic** Sample Size, Jan-Jun (2022-2023)

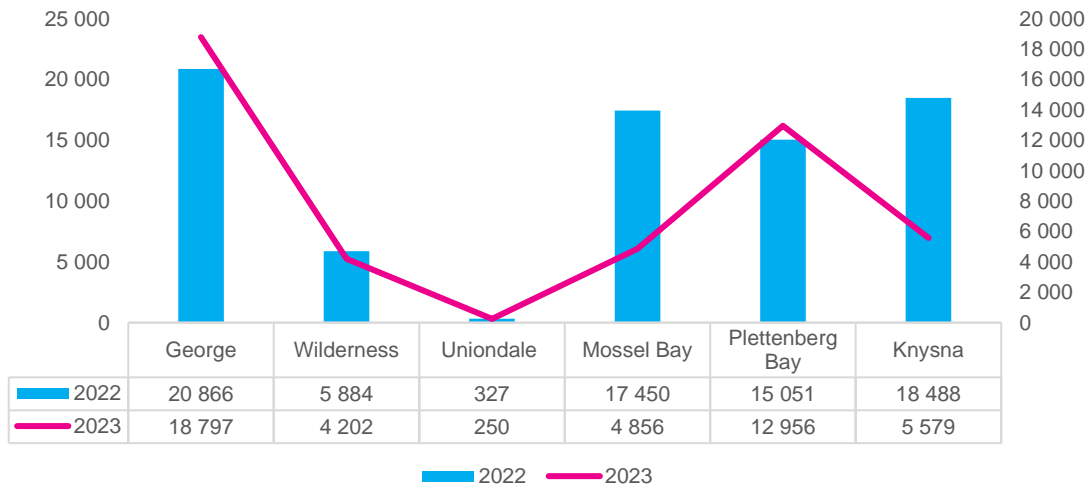
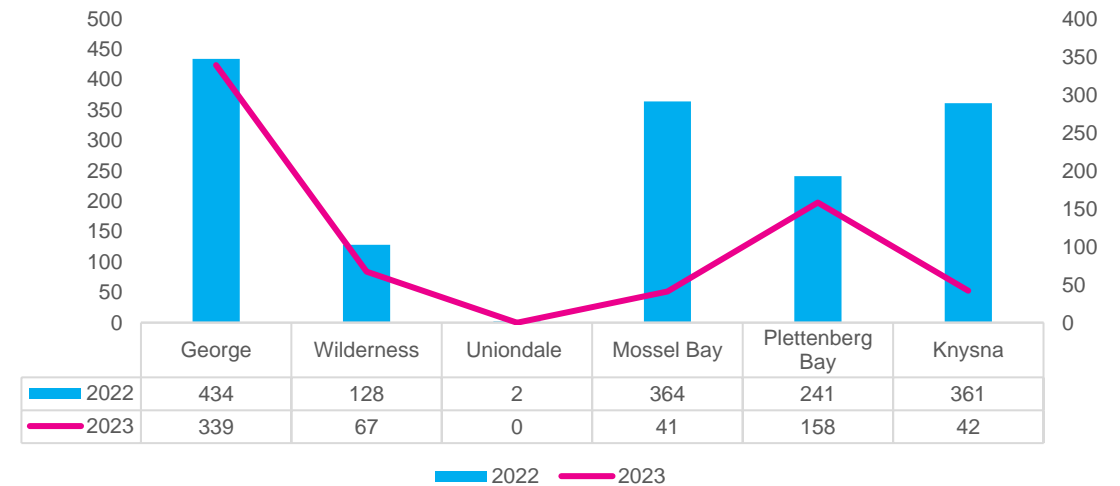


Figure 19: **International** Sample Size, Jan-Jun (2022-2023)



4.2. Day and Overnight Visitors: Domestic

- The greatest share of domestic visitors to the Garden Route and Klein Karoo stayed overnight in Mossel Bay in both 2022 (56.8%) and 2023 (54.4%). This was closely followed by visitors who stayed overnight in Wilderness and Plettenberg Bay, as seen in figure 20.
- Figure 21 shows the average length of stay for domestic visitors in the Garden Route and Klein Karoo was one to two days. Only a few travellers stayed for more than two days.

Figure 20: % **Domestic** Overnight Visitors, Jan-Jun (2022-2023)

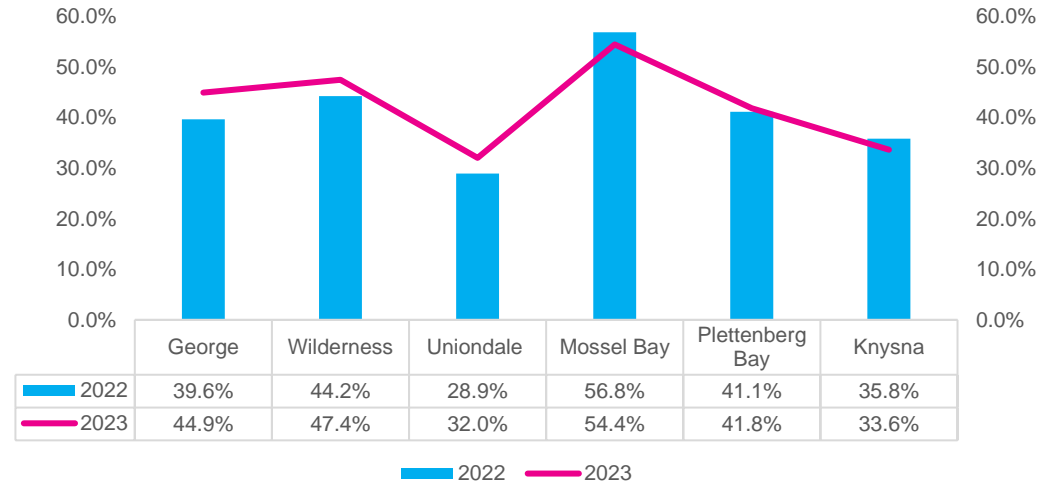
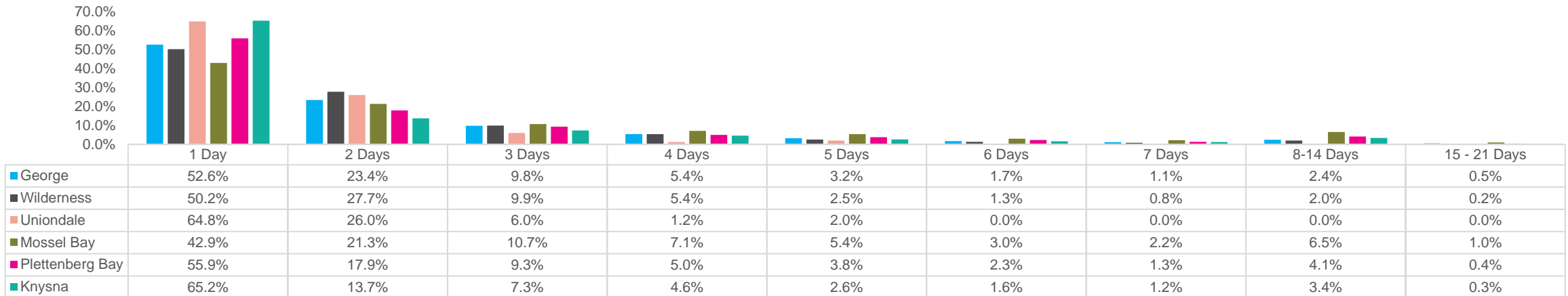


Figure 21: Average Length of Stay, Jan-Jun 2023 (**Domestic**)



4.3. Day & Overnight Visitors: International

- Figure 22 shows that between January 2022 and June 2023 Plettenberg Bay attracted the greatest share of international overnight visitors (61.4%) in 2022 and (58.9%) in 2023. Mossel Bay and Knysna were also popular destinations for international overnight visitors during this period.
- International visitors to the towns listed in Figure 23 spent between one to two days in the region.

Figure 22: % *International* Overnight Visitors, Jan-Jun (2022-2023)

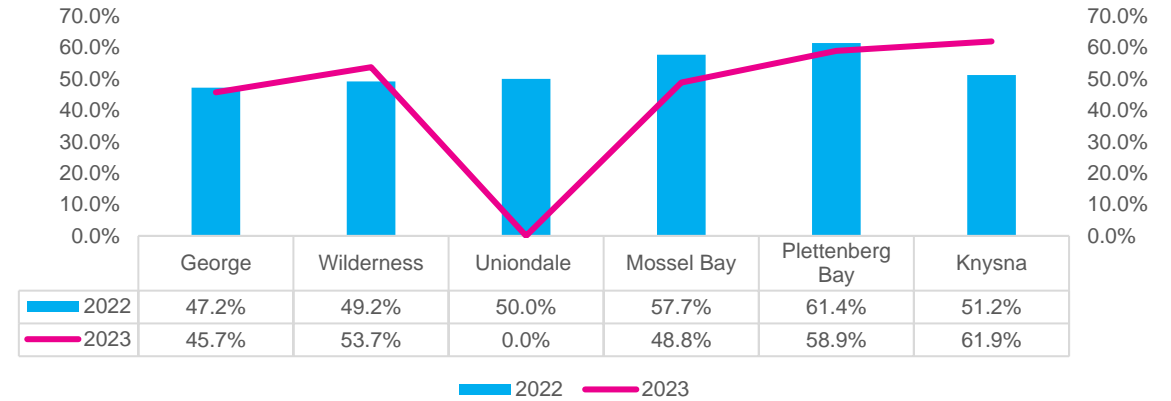
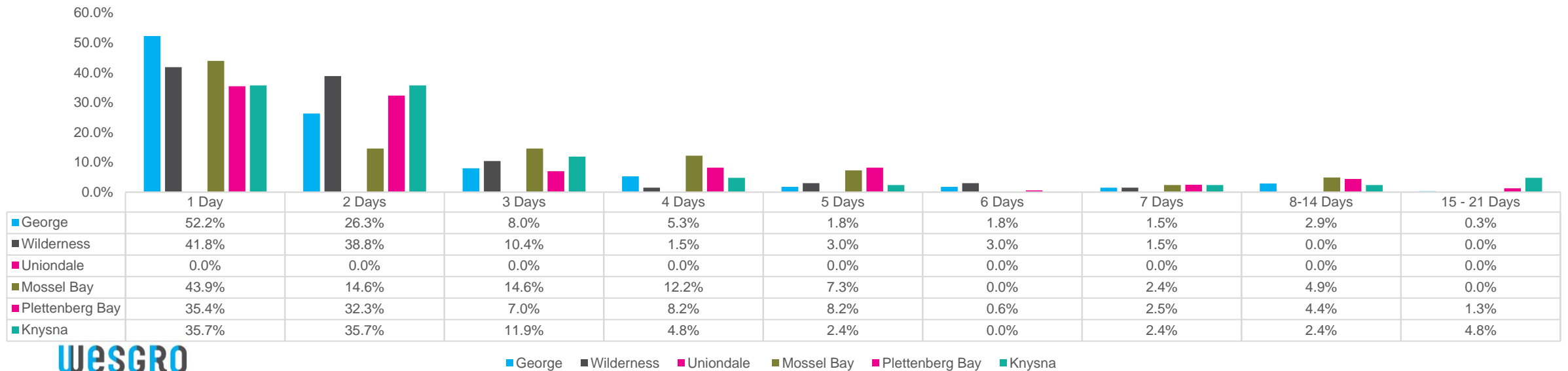


Figure 23: % Average Length of Stay, Jan-Jun 2023 (*International*)



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

- Friday was the most popular arrival day for domestic visitors to the towns with some 17% of visitors arrived on this day, as shown in Figure 24. Wilderness attracted the highest share of visitors on Fridays (18.1%) while Uniondale recorded the lowest share of arrivals on that day (13.6%). The second most popular arrival days were Wednesdays and Saturdays.
- Regarding departures, visitors mostly left on Fridays and Mondays, as shown in figure 25.

Figure 24: Popular **Arrival** Days of the Week, Jan-Jun 2023: (**Domestic**)

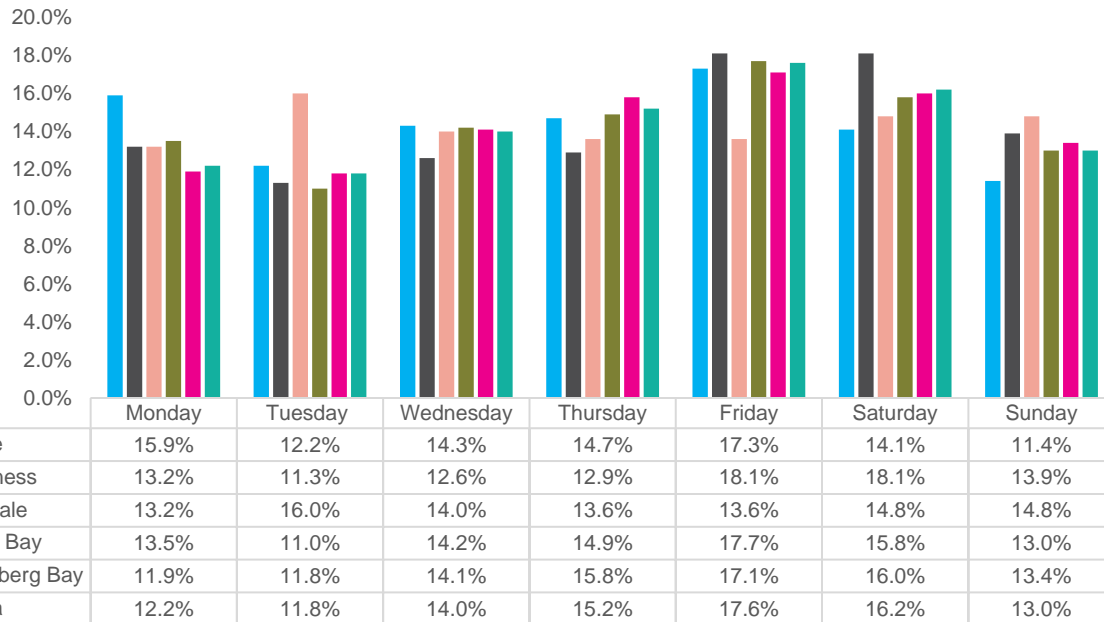
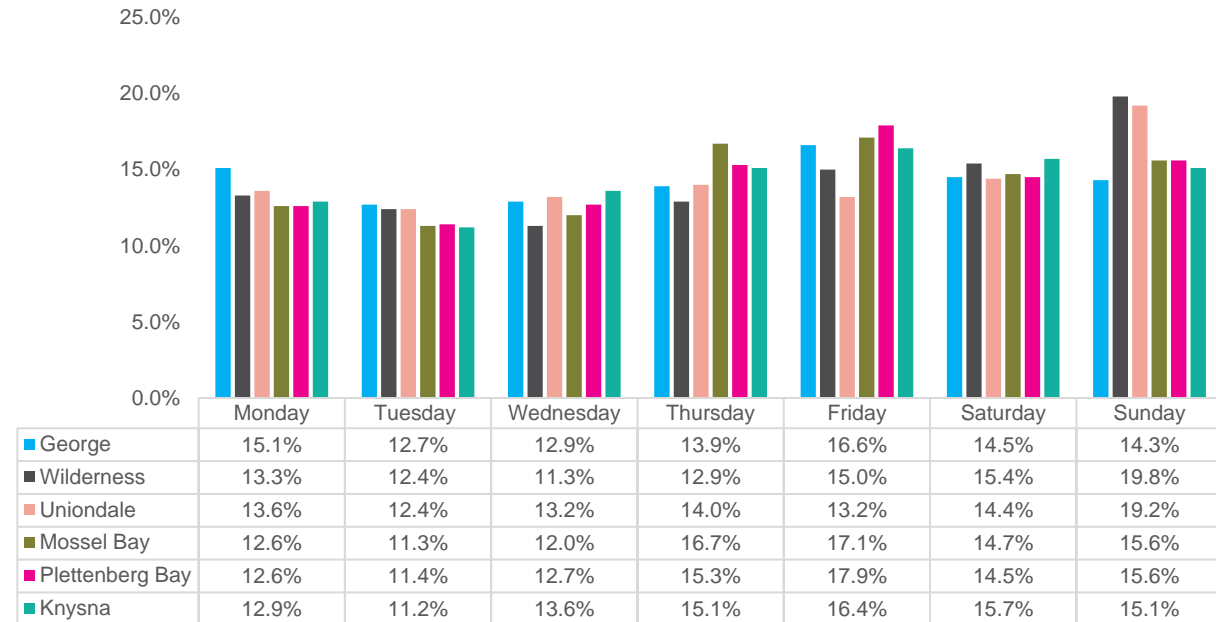


Figure 25: Popular **Departure** Days of the Week, Jan-Jun 2023: (**Domestic**)



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

- For international visitors, Wednesdays and Fridays were the most popular arrival days for the period January until June 2023, as shown in Figure 26. Thursdays and Sundays were the second most popular days. George, Plettenberg Bay and Knysna had the highest share of arrivals on Fridays.
- Figure 27 shows that departure days for international visitors leaving these towns were generally Fridays, Wednesdays and Sundays.

Figure 26: Popular **Arrival** Days, Jan-Jun 2023
(International)

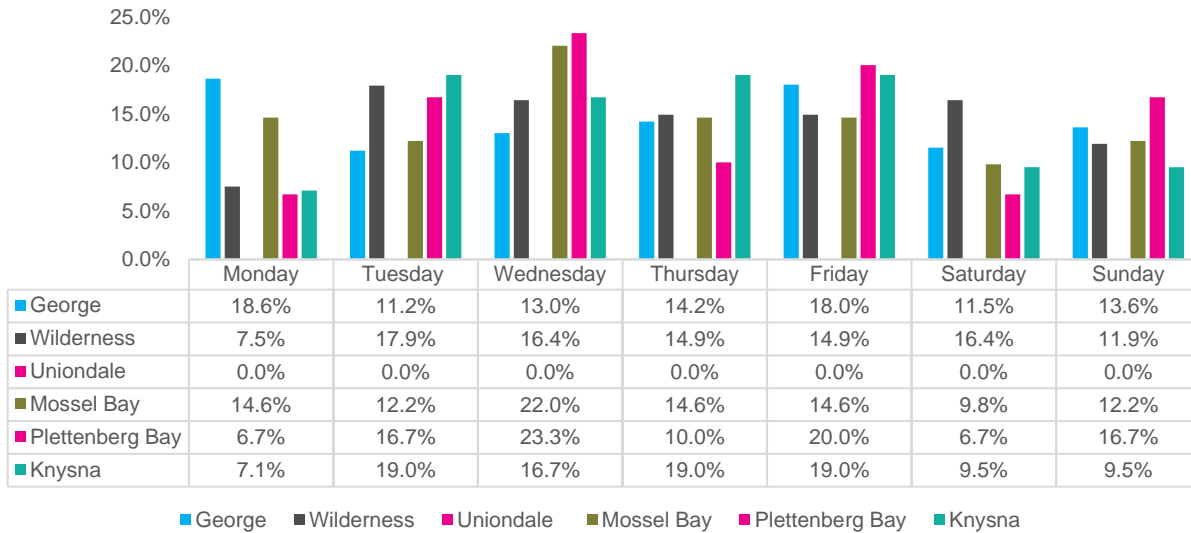
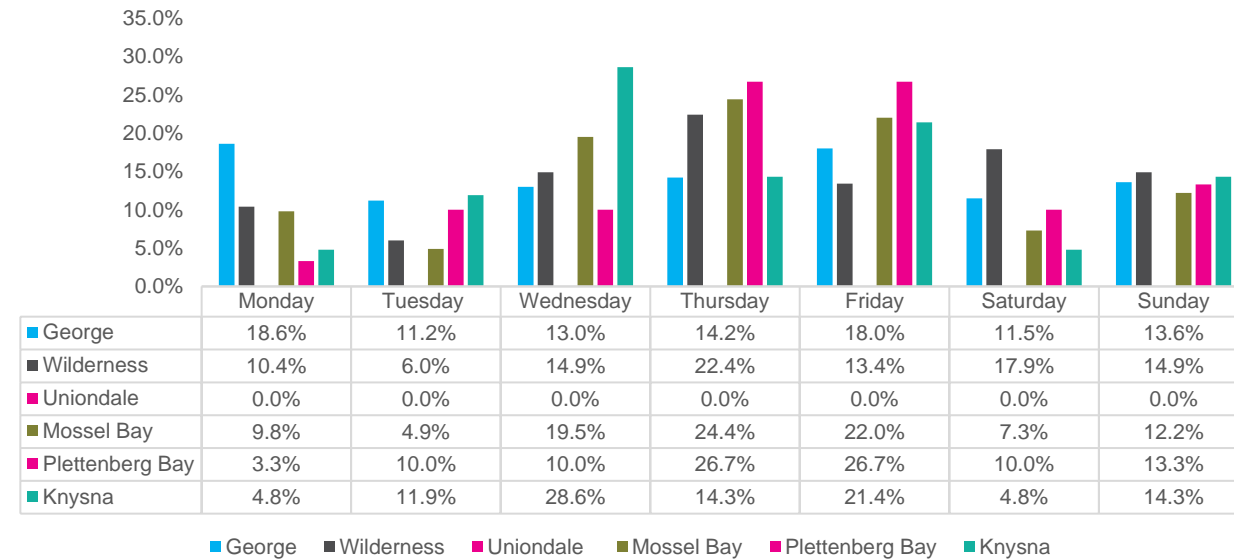


Figure 27: Popular **Departure** Days, Jan-Jun 2023
(International)



Mobile Tourists and Non-Tourists Definitions

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.

Source: Rove, 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 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

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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