

Garden Route

August 2024

Executive Summary

This destination sector fact sheet provides key trade and investment related statistics for the Garden Route district municipality. Specifically, it shows the Garden Route district's area, population, employment, trade, investment, and tourism trends with the rest of the world. The key highlights are provided below:

Economy

- In 2023, the Garden Route district's economy grew by 1.0% y-o-y, reaching a Regional Gross Value Added (RGVA) value of ZAR45.08bn, up from ZAR44.63bn in 2022.
- The George local municipality was the largest contributor to RGVA in the Garden Route in 2023, accounting for 40.49% of total RGVA. Mossel Bay and Oudtshoorn, placed second and third, accounting for 17.49% and 12.55% of RGVA, respectively.
- By sector, the finance, insurance, real estate, and business services sector was the largest contributing sector to the district's RGVA in 2023, accounting for 34.15% of total output. The wholesale and retail trade, catering, and accommodation sector followed at 14.27%, with the manufacturing sector the third largest contributor at 13.19%.
- The total number of employed in the district stood at 226,158 in 2023, an increase of 5.19% y-o-y from 215,002 recorded in 2022.
- The top-employing sectors in 2023 were wholesale and retail trade, catering and accommodation sector, accounting 24.2% of total employment. The finance, insurance, real estate, and business services sector followed with a 19.3% share, with the community, social and personal services sector in a close third position with an 18.9% share.

Trade

- The total value of exports for the Garden Route amounted to ZAR7.70bn in 2023, an increase of 2.82% on the ZAR7.49bn earned in 2022. Imports in turn increased by 47.29% y-o-y to a cost of ZAR22.50bn in 2023, up from ZAR15.28bn incurred in 2022.
- The United States was the top destination market for the district's exports in 2023, at a value of ZAR992.68m. This was equivalent to 12.90% of the region's total global exports. China followed at a value of ZAR625.67m, with the United Kingdom in third place at ZAR613.53m.
- The United Arab Emirates was the district's top import source market in 2023, which at a cost of ZAR3, 997.24m, was equivalent to 17.77% of total import costs incurred. This was followed by India at ZAR3, 561.61m and China (ZAR1, 874.20).
- By product, apples, pears, and quinces were the district's top export product category in 2023, with earnings of ZAR1,921m, equivalent to 25% of total export earnings. Citrus fruit, (15.05% share), and seeds, fruit and spores (8.99% share) followed in second and third place respectively. In turn, petroleum products (other than crude) dominated imports at a cost of ZAR19,122m, equivalent to 85% of all import costs incurred in 2023.

Investments

- Between January 2003 and June 2024, a total of eight foreign direct investment projects with a combined value of ZAR22.53bn were made by eight international companies into the Garden Route district. An estimated 661 jobs were created from these projects.

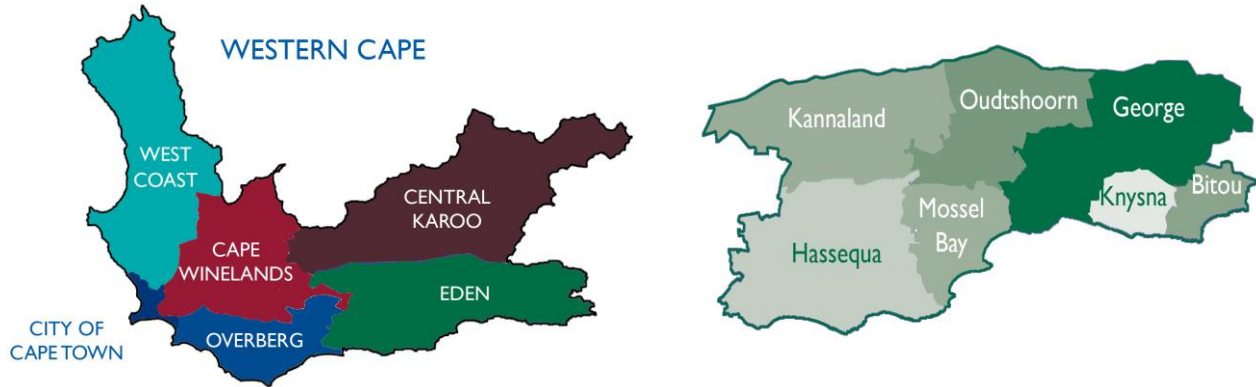
Tourism

- A total of 155, 331 domestic and 2, 740 international tourists visited the Garden Route district in 2023.
- Within the domestic data set over 50 000 of the sampled tourists were from the City of Cape Town, whereas the greatest number of international visitors (446), were from the United States.

1. Area

The Garden Route district is one of six districts located in the Western Cape. The district is located in the south-east of the province, occupies a total land area of 23, 331km², and had a total estimated population of 857, 132 people in 2023. By population group, the largest group in the district are Coloureds (53.15%), followed by Black Africans (30.16%) and Whites (16.25%). The district is comprised of seven municipalities, namely, Kannaland, Hessequa, Mossel Bay, George, Oudtshoorn, Bitou, and Knysna.

Figure 1: District municipalities within the Western Cape



2. General Information

Table 1 shows the key indicators for the Garden Route district.

Table 1: Key indicators, Garden Route district

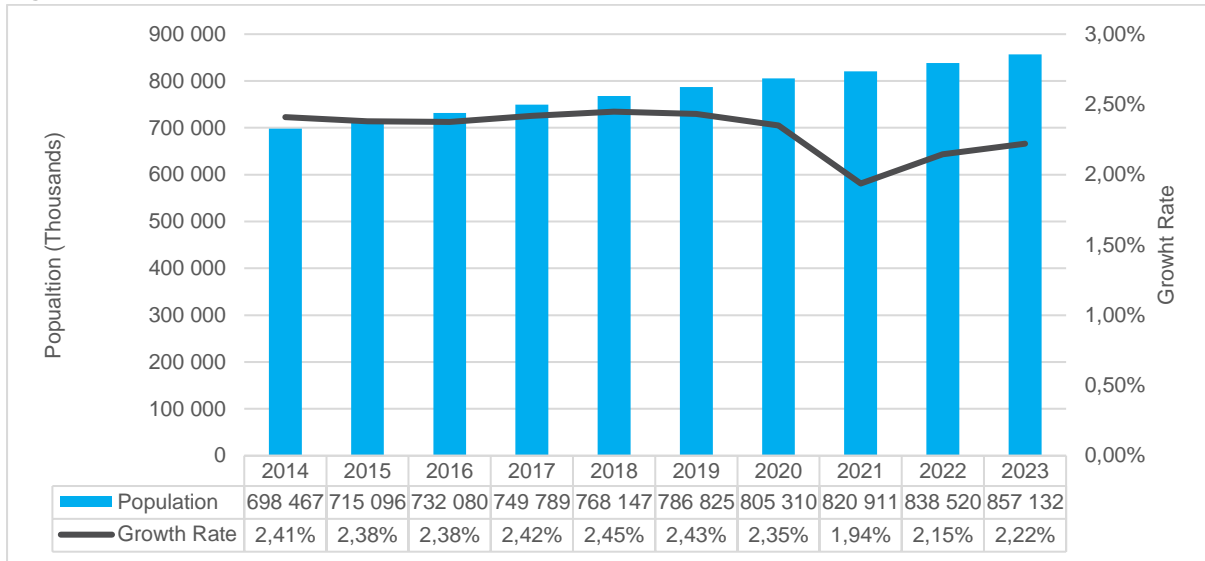
INDICATOR	
Executive Mayor	Ald. Memory Booysen
Population (2023 estimates)	857,132
Population groups (2023 estimates)	Coloured (53.15%), Black African (30.16%), Whites (16.25%), and Indian and Asian (0.45%)
Real GVA (2023)	ZAR45.08 billion
Real GVA growth rate (2023)	1.01%
Unemployment rate (2022)	19.88%
Gini coefficient (2022)	0.55
HDI (2022)	0.77

Sources : Garden Route District Municipality ; Quantec, 2024

2.1. Demographics

In 2023, the Garden Route had an estimated population of 857, 132 people, making it the third most populous district in the Western Cape, after the City of Cape Town, and the Cape Winelands district. The district accounted for 11.33% of the Western Cape's population in 2023 and its population is estimated to have grown by an annual average rate of 2.31% over the 10 year-period, 2014 to 2023.

Figure 2: Garden Route district population estimates, 2014-2023



Source: Quantec, 2024

The table below shows the Garden Route district’s population breakdown by racial groups. In 2023, the Coloured population represented the largest racial group, accounting for 53.15%, followed by Africans (30.16%), and Whites who accounted for 16.25%. However, within this grouping, a slight increment in number has been recorded over the years with the Asians/Indians growing 4.47% y-o-y from 3, 660 in 2022 to 3, 823 in 2023.

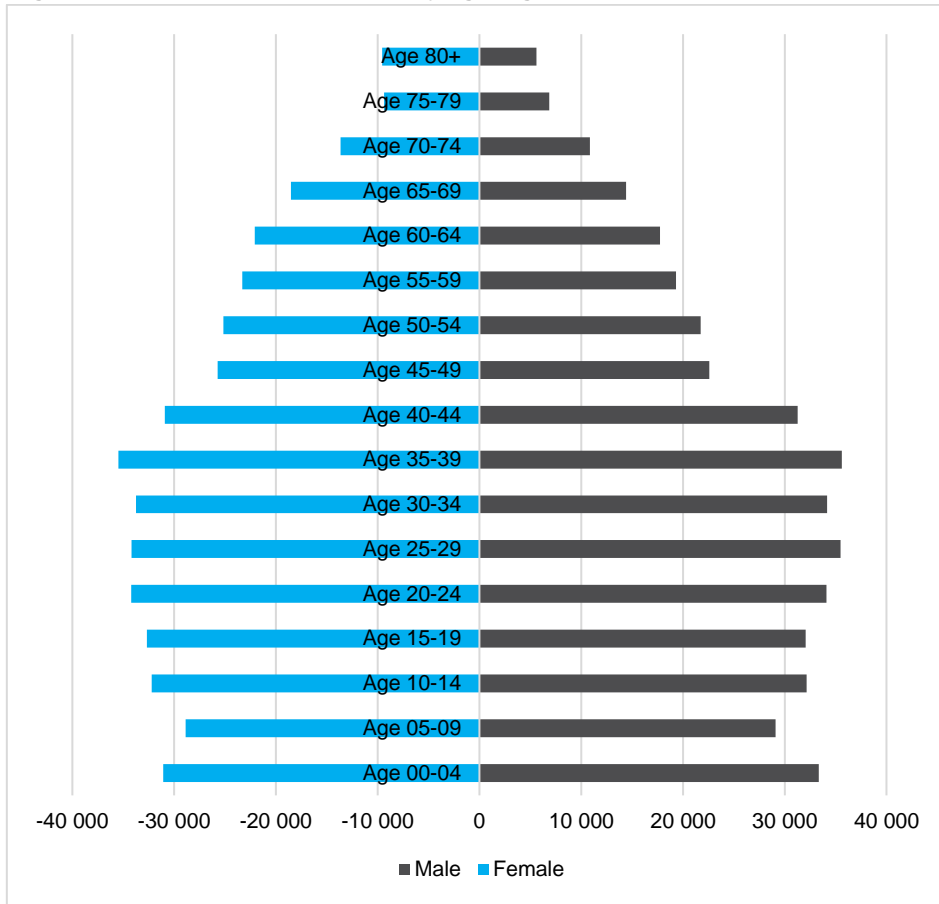
Table 2: Population breakdown by group, Garden Route, 2022-2023

GROUP	2022	2023	% SHARE, 2023	% CHANGE, 2022-2023
Coloured	446 749	455 568	53.15%	1.97%
Black African	249 993	258 492	30.16%	3.40%
White	138 117	139 247	16.25%	0.82%
Asian/Indian	3 660	3 823	0.45%	4.47%
TOTAL	838 520	857 132	100.00%	2.22%

Source: Quantec, 2024

The bar chart below shows the age and gender breakdown of the population of the Garden Route. As shown in the graph, the largest percentage of the population are below 35 years of age, indicating that most of the population is still young.

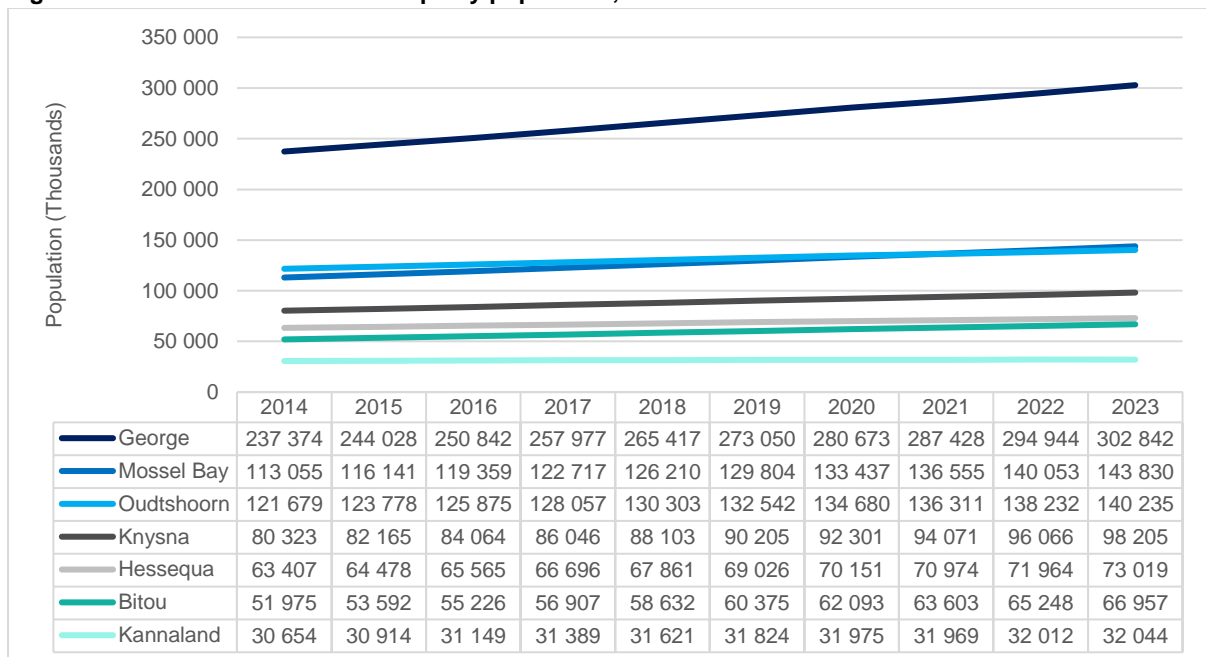
Figure 3: Garden Route population by age & gender, 2023



Source: Quantec, 2024

Within the greater district, George is the most populated municipality in the Garden Route, as shown in figure 4 below. The municipality had an estimated population of 302, 842 people in 2023. This was followed by the Mossel Bay and Oudtshoorn with 143, 830 and 140, 235 inhabitants, respectively.

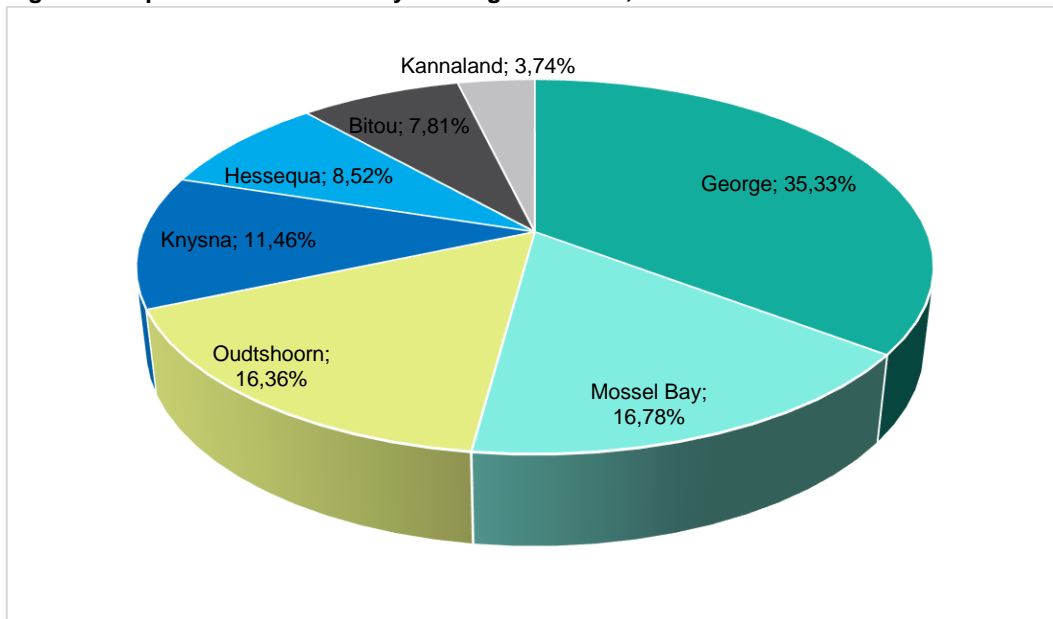
Figure 4: Garden Route local municipality population, 2014-2023



Source: Quantec, 2024

In Figure 5 below, the sub-regional breakdown of the population in the Garden Route in 2023 is given. The largest proportion of the population lives in the George municipality (35.33%), followed by Mossel Bay (16.78%), and Oudtshoorn municipality (16.36%).

Figure 5: Population breakdown by sub-region in 2023, Garden Route

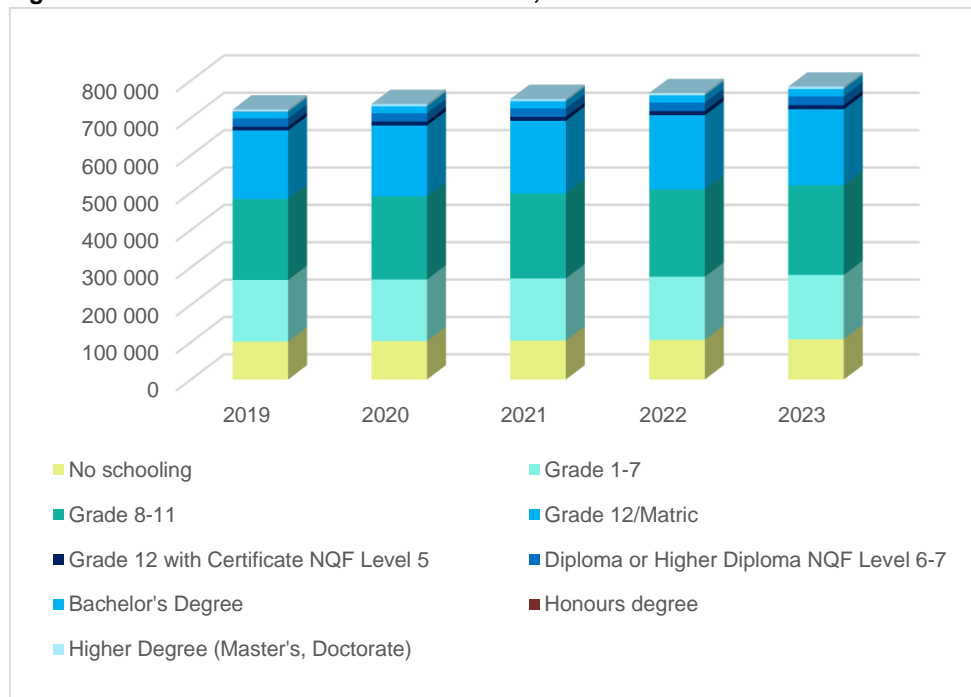


Source: Quantec, 2024

Education

In the Garden Route, the population with no schooling was estimated at 12.55% in 2023. Those with Grade 1-7 and Grade 8-11 were estimated at 20.09% and 28.03% respectively, in the same year. An estimated 23.72% of the population held a Grade 12/Matric in 2023. Those with bachelors, master's and higher education degrees totalled 3.02%.

Figure 6: Levels of education in Garden Route, 2019 - 2023



Note: Data is from the REDU—Persons' level of education by gender, population group and age group at 2016 local municipality/ward-based metro region level

3. Employment

The table below provides a snapshot of indicators for employment in the Garden Route district in 2022 and 2023.

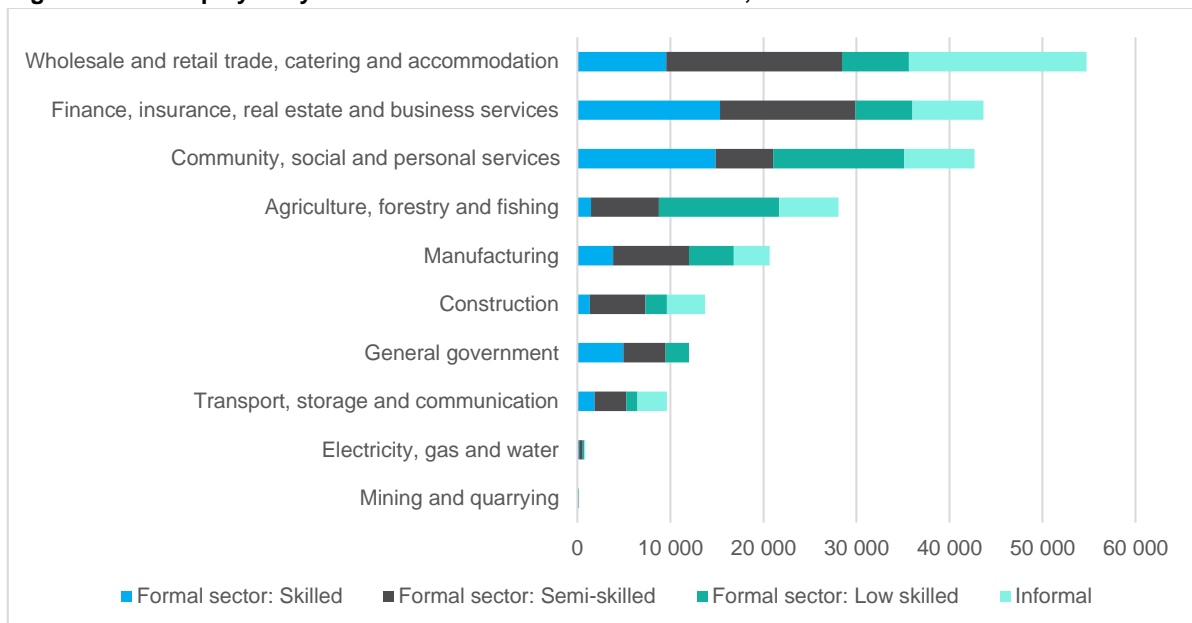
TABLE 3: EMPLOYMENT INDICATORS, 2022 & 2023	
Population aged 15-64 years (2022 estimates)	632, 187
Working-age population (15-64 years) (2022)	410, 190
Labour force (economically active) (2022)	269, 716
Labour force participation rate (%) (2022)	65.75%
Labour absorption rate (%) (2022)	52.68%
Employed (2023)	226, 158
Formally Employed (2023)	174, 231
Informally Employed (2023)	51, 927
Unemployed (2022)	53, 612
Unemployment rate (%) (2022)	19.88%
Not economically active (2022)	140, 474

Source: Quantec, 2024

The wholesale and retail trade, catering and accommodation sector was the largest employing sector in the district in 2023 with 54, 732 people employed. This was followed by the finance, insurance, real estate, and business services, which employed 43, 648 people. The community, social and personal services sector in turn employed 42, 687 people.

In terms of sector employment by skills, the finance, insurance, real estate, and business services sector employed the largest number of highly skilled people (15, 326). While the wholesale and retail trade, catering and accommodation sector employed mostly the semi-skilled (18, 907) and informal employment (19, 102). The low skilled (14, 055) were mostly employed in the community, social and personal services sector.

Figure 7: The employed by sector and skills in the Garden Route, 2023

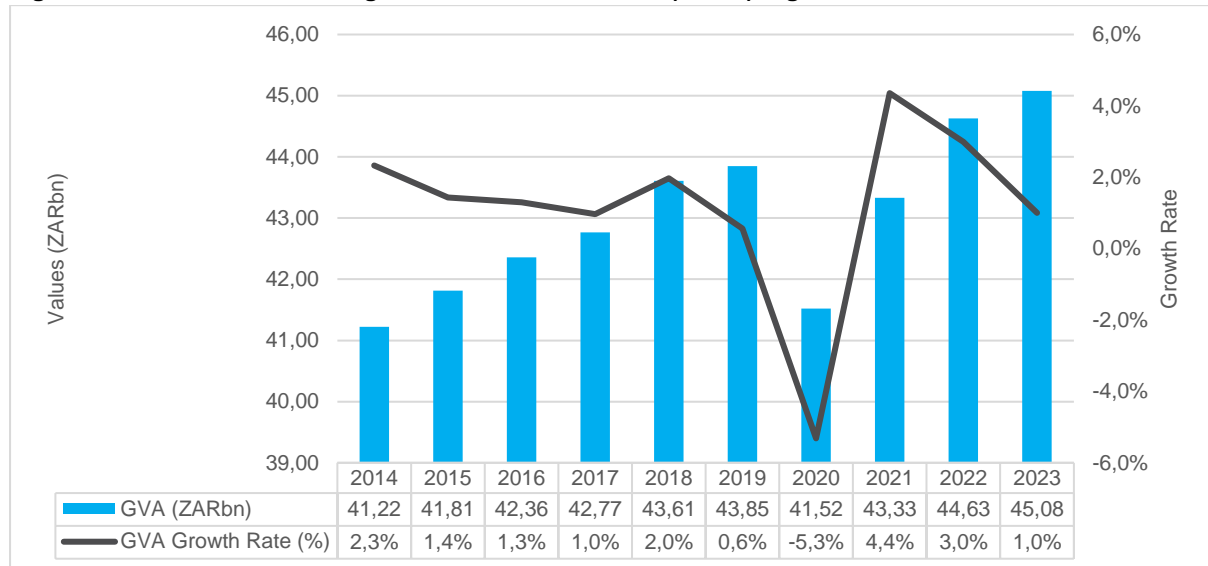


Source: Quantec, 2024

4. Economic Overview

The Garden Route economy grew by 1.0% y-o-y in 2023, reaching a RGVA value of ZAR45.08bn, up from a value of ZAR44.63bn in 2022. Looking 10 years back, between 2014 and 2023, the economy grew by 9.4%, from a value of ZAR41.22bn in 2014 to ZAR45.08bn in 2023. Moreover, on average, RGVA grew at an average annual growth rate (AAGR) of 1.2% over the period 2014 through 2023.

Figure 8: Garden Route real Regional Gross Value Added (RGVA) & growth, 2014-2023



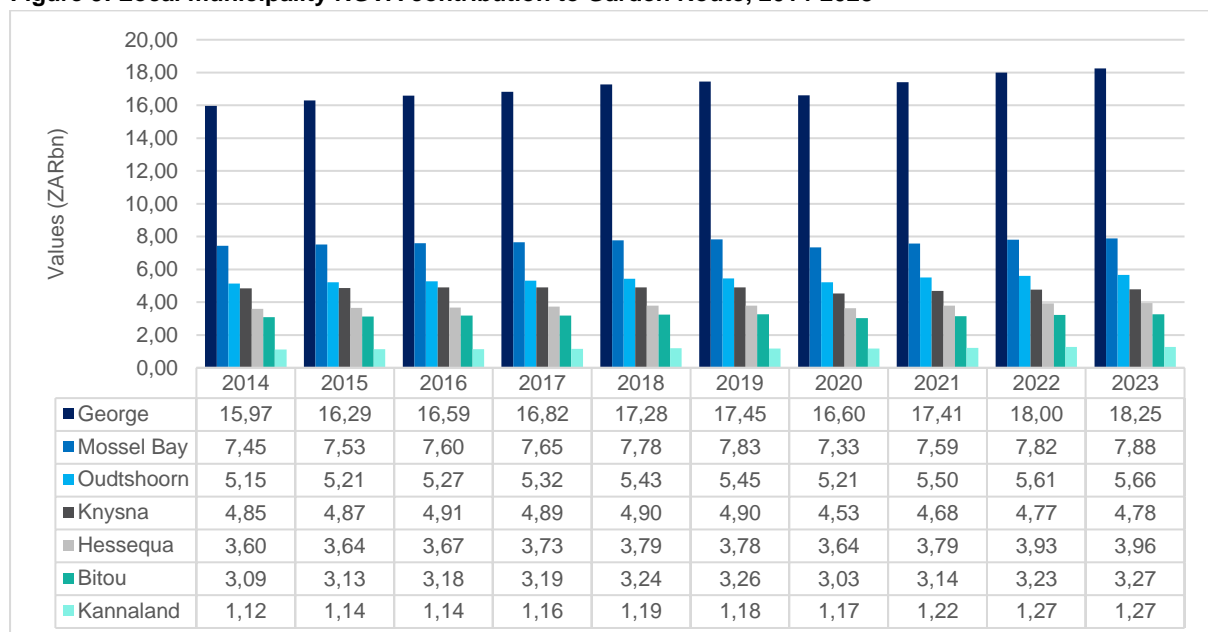
Source: Quantec, 2024

Concept: GVA at basic prices

Unit: ZAR - constant 2015 prices

The figure below shows the contribution share of Garden Route local municipalities to regional GVA for the period 2014 through 2023. Historically the George local municipality has always been the largest contributor to GVA in the Garden Route district, and in 2023, George contributed ZAR18.25bn to the district's economic output, equivalent to 40.49% of total RGVA. Mossel Bay and Oudtshoorn were the second and third largest contributors to the district's GVA in 2023, contributing with 17.49% and 12.55% of total output, respectively.

Figure 9: Local municipality RGVA contribution to Garden Route, 2014-2023



Source: Quantec, 2024

Sector GVA

The finance, insurance, real estate, and business services sector was the largest contributor to the Garden Route's GVA in 2023, accounting for 43.15% of total GVA. It was followed by the wholesale and retail trade, catering, and accommodation sector (14.27%), and the manufacturing sector at (13.19%).

Table 4: Sector breakdown of RGVA, 2019-2023

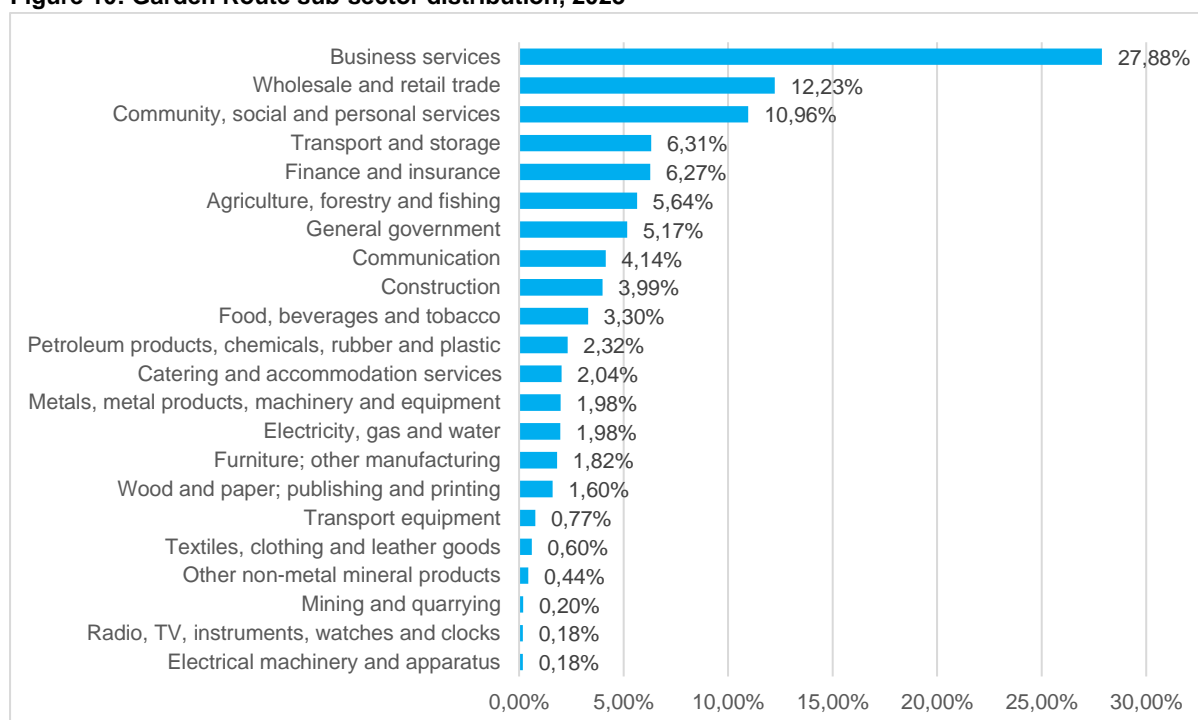
SECTOR	VALUE 2019 (ZARbn)	VALUE 2020 (ZARbn)	VALUE 2021 (ZARbn)	VALUE 2022 (ZARbn)	VALUE 2023 (ZARbn)	% SHARE 2023	% CHANGE, 2022-2023
Finance, insurance, real estate and business services	13.71	13.82	14.43	14.99	15.39	34.15%	2.70%
Wholesale and retail trade, catering and accommodation	6.78	5.96	6.26	6.53	6.43	14.27%	-1.60%
Manufacturing	5.95	5.3	5.84	5.86	5.95	13.19%	1.50%
Community, social and personal services	4.81	4.68	4.83	4.88	4.94	10.96%	1.20%
Transport, storage and communication	4.53	3.8	4.02	4.49	4.71	10.46%	5.00%
Agriculture, forestry and fishing	2.08	2.53	2.62	2.67	2.54	5.64%	-4.90%
General government	2.38	2.4	2.33	2.33	2.33	5.17%	0.10%
Construction	2.47	1.99	1.93	1.84	1.8	3.99%	-1.90%
Electricity, gas and water	1.03	0.95	0.97	0.94	0.89	1.98%	-5.50%
Mining and quarrying	0.12	0.1	0.11	0.09	0.09	0.20%	-0.50%
Total	43.85	41.52	43.33	44.63	45.08	100.00%	1.00%

Source: Quantec, 2024

Sub-sector distribution

For contribution to GVA by sub-sector, business services were the largest contributor in 2023, which at a value of ZAR12.57bn was equivalent to 27.88% of output. This was followed by wholesale and retail trade at ZAR5.51bn (12.23%), and community, social and personal services at ZAR4.94bn (10.96%).

Figure 10: Garden Route sub-sector distribution, 2023



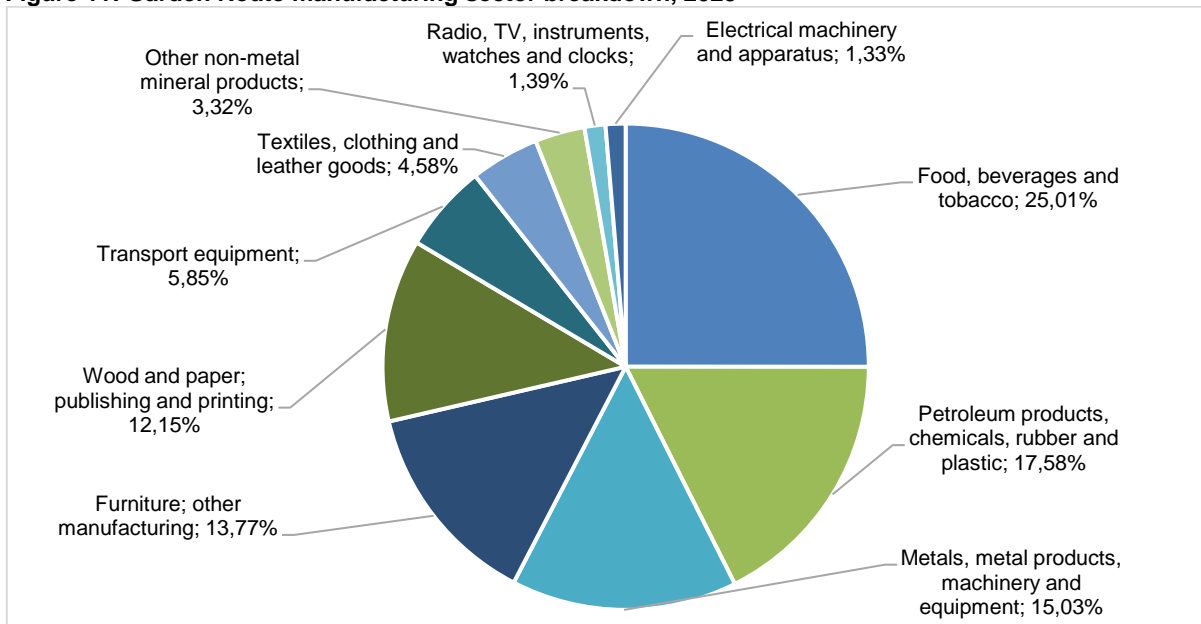
Source: Quantec, 2024

Manufacturing sector breakdown

The figure below shows the sub-sector contribution to the Garden Route's manufacturing output in 2023. The top subsectors by largest contribution were:

- Food and beverages and tobacco sub-sector, which at a value of ZAR5.95bn was equivalent to a 25.011% share of manufacturing output.
- Petroleum products, chemicals, rubber and plastic sub-sector at ZAR1.49bn equivalent to a 17.58% share and
- Metals, metal products, machinery and equipment at ZAR0.893bn (15.03% share).

Figure 11: Garden Route manufacturing sector breakdown, 2023



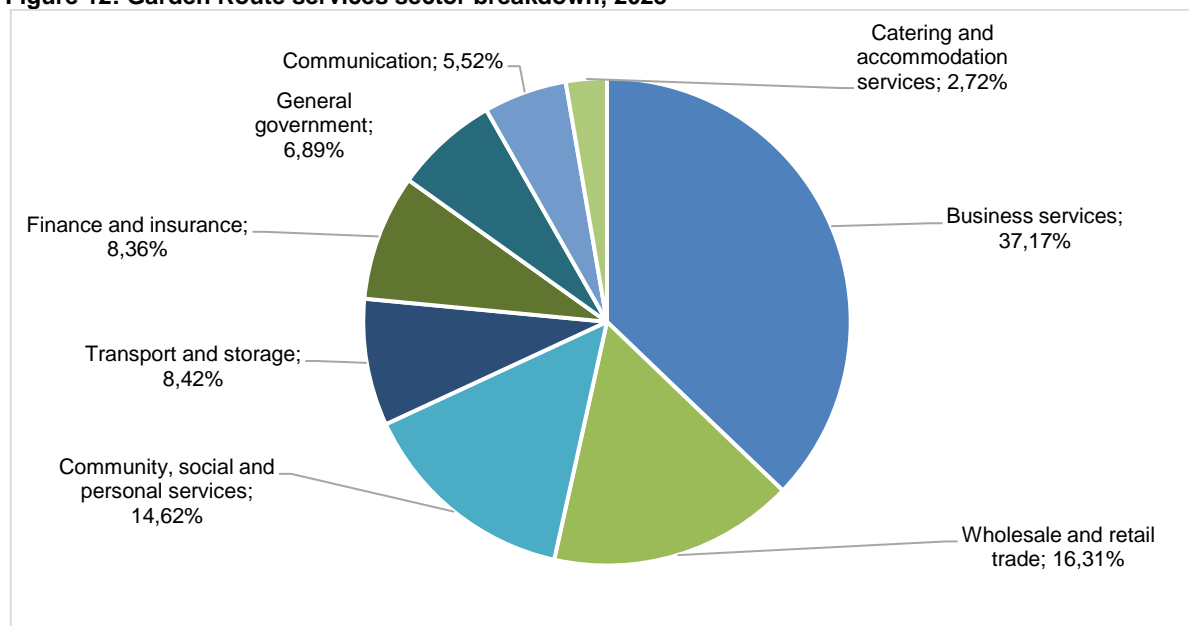
Source: Quantec, 2024

Services sector breakdown

Figure 12 below gives the breakdown of the Garden Route's services sector output in 2023. The top subsectors by largest contribution were:

- Business services at a value of ZAR12.56bn, equivalent to a 37.17% share
- Wholesale and retail trade at a value of ZAR5.51 bn (16.31% share)
- Community, social and personal services at ZAR4.94bn (14.62% share).

Figure 12: Garden Route services sector breakdown, 2023

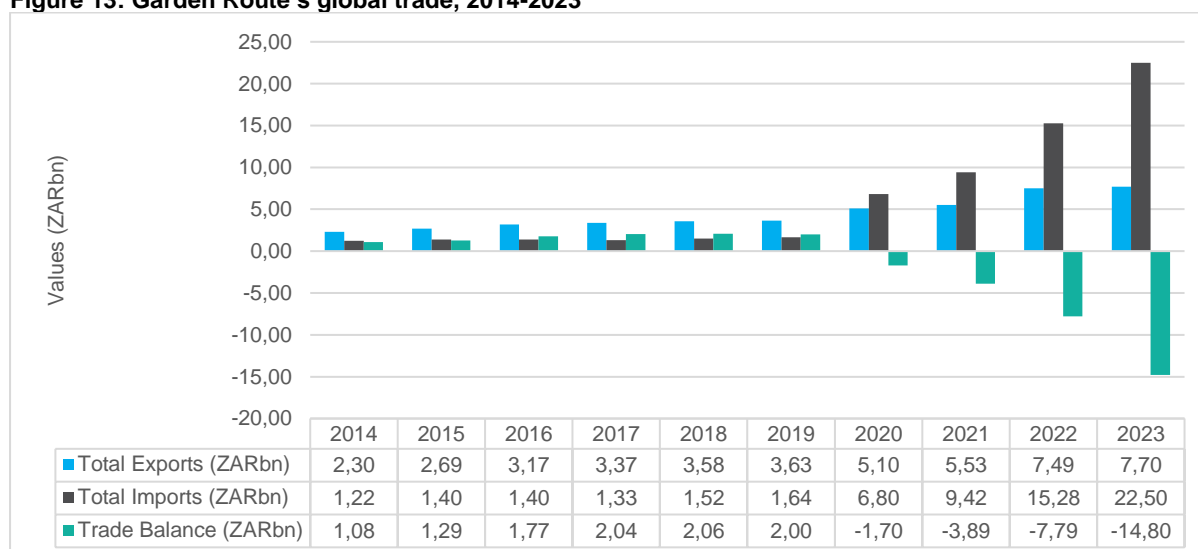


Source: Quantec, 2024

5. International Trade

In 2023, the district's value of goods exports grew by 2.82% y-o-y to a value of ZAR7.70bn, up from ZAR7.49bn earned in 2022. Since 2014, exports have grown by a significant 233.92% (adding ZAR5.39bn). Imports in turn increased by 44.29% y-o-y to a cost of ZAR22.50bn in 2023, up from ZAR15.28bn incurred in 2022. On average, exports increased at an average annual growth rate (AAGR) of 15.73% and imports at 51.66% over the past 10 years.

Figure 13: Garden Route's global trade, 2014-2023



Source: Quantec, 2024

Note: Values are in SA Rand (ZAR, current prices)

Key trade markets

Table 5 below presents the top ten destination markets for the Garden Route's exports in 2023. The United States was the top destination market for the district's exports in 2023, accounting for a 12.90% share of total export earnings. China (8.13% share) and the United Kingdom (7.97% share) ranked second and third, respectively. Combined, the top 10 export markets accounted for 58% of district's total exports in 2023.

Of the top 10 markets, the fastest growing markets for the district's exports over the past five years, as measured by the highest average growth rate were, the United Arab Emirates (UAE) (84.46%), India (82.63%) and Malaysia (56.94%).

Table 5: Garden Route's top 10 exports destination markets, 2023

RANK	COUNTRY	VALUE 2023 (ZARm)	% SHARE, 2023	% AVE GROWTH, 2019-2023
1	United States	992.68	12.90%	30.22%
2	China	625.67	8.13%	6.30%
3	United Kingdom	613.53	7.97%	51.27%
4	Netherlands	571.47	7.42%	30.58%
5	United Arab Emirates	498.87	6.48%	84.46%
6	France	351.51	4.57%	20.01%
7	India	218.23	2.84%	82.63%
8	Italy	212.90	2.77%	17.44%
9	Malaysia	206.86	2.69%	56.94%
10	Hong Kong Special Administrative Region of China	194.52	2.53%	14.64%
TOTAL EXPORTS		7696.74	100.00%	17.70%

Source: Quantec, 2024

The top source markets for the Garden Route's imports in 2023 are shown in table 6 below. The UAE was the district's top import source market in 2023, accounting for 17.77% share of total imports. India (15.83%) and China (8.33%) came in second and third respectively. Combined, the top 10 markets accounted for 78% of district's total imports in 2023.

Of the top 10 markets, the fastest growing markets for the district's imports over the past five years, as measured by the highest average growth rate were, Singapore (UAE) (25192.77%), followed by Qatar (9574.60%) and UAE (3073.92%).

Table 6: Garden Route's top 10 import source markets , 2014-2023

RANK	COUNTRY	VALUE 2023 (ZARm)	% SHARE, 2023	% AVE GROWTH, 2019-2023
1	United Arab Emirates	3 997.24	17.77%	3073.92%
2	India	3 561.61	15.83%	1127.56%
3	China	1 874.20	8.33%	65.87%
4	Saudi Arabia	1 741.27	7.74%	-
5	Malaysia	1 611.96	7.16%	559.43%
6	Qatar	1 349.18	6.00%	9574.60%
7	Bahrain	1 125.60	5.00%	-
8	Singapore	829.73	3.69%	25192.77%
9	Panama	749.74	3.33%	-
10	Kuwait	721.07	3.20%	-
TOTAL IMPORTS		22 500.37	100.00%	94.35%

Source: Quantec, 2024

Key trade products

The top ten exported products from the Garden Route in 2023 are shown in table 7 below. Apples, pears, and quinces was the top export category from the district in 2023, accounting for 24.96% of the total export basket. Citrus fruit (15.05% share), and seeds, fruit and spores (8.99% share) followed in second and third place respectively. Combined, the top 10 export products accounted for 75% of total exports in 2023.

Of the top 10 export products, the fastest growing categories over the past five years, as measured by the highest average growth rate were, apples, pear and quinces (19 634.97%), other fruit (1 167.35%) and other aircraft; spacecraft (including satellites) (334.95%).

Table 7: Garden Route's top 10 exports, 2023

RANK	PRODUCT	VALUE (ZARm), 2023	% SHARE, 2023	AVE GROWTH %, 2019-2023
1	Apples, pears and quinces	1920.84	24.96%	19634.97%
2	Citrus fruit	1158.35	15.05%	0.21%
3	Seeds, fruit and spores	692.08	8.99%	22.16%
4	Leather further prepared after tanning or crusting,	625.48	8.13%	14.03%
5	Skins and other parts of birds with their feathers or down	480.02	6.24%	19.19%
6	Pumice stone; emery; natural corundum	455.30	5.92%	-
7	Insecticides, rodenticides, fungicides, herbicides, anti-sprouting products	128.14	1.66%	13.51%
8	Other fruit	126.13	1.64%	1167.35%
9	Other prepared or preserved meat	118.28	1.54%	37.70%
10	Other aircraft; spacecraft (including satellites)	93.24	1.21%	334.95%
TOTAL EXPORTS		7696.74	100.00%	17.70%

Source: Quantec, 2024

In terms of imports, petroleum oils, other than crude was the top import category for the Garden Route in 2023, accounting for 84.99% of the total import costs. This was followed by new pneumatic tyres of rubber (1.71%) and coal, briquettes, ovoids (0.62%) in a distant second and third place respectively. Combined, the top 10 import products accounted for 91% of total imports in 2023.

Of the top 10 import products, the fastest growing categories over the past five years, as measured by the highest average growth rate were, petroleum oils, other than crude (886 974.76%); coal, briquettes, ovoids (2 067.95%); and trunks, suit-cases, vanity-cases, executive-cases, brief-cases, school satchels (628.18%).

Table 8: Garden Route's top 10 imports, 2023

RANK	PRODUCT	VALUE (ZARm), 2023	% SHARE, 2023	AVE GROWTH %, 2019-2023
1	Petroleum oils, other than crude	19122.39	84.99%	886974.76%
2	New pneumatic tyres, of rubber	384.98	1.71%	109.49%
3	Coal; briquettes, ovoids and	139.67	0.62%	2067.95%
4	Automatic data processing machines and units thereof; magnetic or optical readers	131.06	0.58%	84.73%
5	Cruise ships, excursion boats, ferry-boats, cargo ships	131.02	0.58%	-
6	Other aircraft (for example, helicopters, aeroplanes); spacecraft (including satellites)	120.78	0.54%	286.34%
7	Trunks, suit-cases, vanity-cases, executive-cases, brief-cases, school satchels	117.02	0.52%	628.18%
8	T-shirts, singlets and other vests, knitted or crocheted	104.43	0.46%	16.04%
9	Telephone sets	103.58	0.46%	63.15%
10	Electric accumulators, including separators	79.13	0.35%	228.72%
TOTAL IMPORTS		22500.37	100.00%	94.35%

Source: Quantec, 2024

6. Foreign Direct Investment

Over the period, January 2003 to June 2024, a total of eight foreign direct investment (FDI) projects with a combined value of ZAR22.53bn were made by eight international companies into the Garden Route district, as shown in the figure below. These projects led to the creation of an estimated 661 jobs.

Table 9: FDI trends in the Garden Route, January 2003 – June 2024

Total FDI Projects	Total Capex	Total Jobs	Total Companies
8	ZAR22.53bn	661	8

Source: fDi Markets, a service from The Financial Times 2024. All Rights Reserved.

Inward FDI into the Garden Route over the period, January 2003 to June 2024 is shown in table 10 below. A total of eight FDI projects were made by eight multinational companies into the region during the specified period. These projects had a cumulative capital investment (capex) of ZAR22, 525.3m and led to the creation of 661 jobs.

Table 10: FDI into Garden Route, January 2003 – June 2024

DATE	INVESTING COMPANY	SOURCE COUNTRY	DESTINATION CITY	INDUSTRY SECTOR	BUSINESS ACTIVITY	CAPEX (ZARm)	JOBS
Jul 2023	International Workplace Group (Regus)	Switzerland	George	Real estate	Business Services	29.1	8
Jul 2021	Mallcomm	United Kingdom	Knysna	Software & IT services	Sales, Marketing & Support	79.8	9
Nov 2019	Klinger South Africa	Austria	Mossel Bay	Industrial equipment	Sales, Marketing & Support	43.0	12
Jun 2018	Nestle South Africa	Switzerland	Mossel Bay	Food & Beverages	Manufacturing	19.9	1
Feb 2013	Builders Warehouse	United States	George	Consumer products	Retail	165.7	187
Dec 2012	Hisense	China	Mossel Bay	Consumer electronics	Sales, Marketing & Support	53.7	29
Dec 2005	Pioneer Natural Resources	United States	Mossel Bay	Coal, oil & gas	Extraction	1 480.3	214
Mar 2004	Equinor (Statoil)	Norway	Mossel Bay	Coal, oil & gas	Manufacturing	20 653.8	201
TOTAL						22 525.3	661

Source: fDi Markets, a service from The Financial Times 2024. All Rights Reserved.

6.1 Sector opportunities and initiatives in the Garden Route

The Garden Route's competitive advantages include its coastal line, with opportunities in ocean economy, coastal tourism; large forestry; agriculture and farming, and effective natural resources.

The district municipality is pursuing projects that include the establishment of a development agency, bulk infrastructure provision, products value chain development, renewable energy, enterprise development, integrated waste management and other projects as identified within the district.

The agency, Invest in Garden Route provides information on sector opportunities identified in the region. Including investment projects that are underway. The links below lead to the website:

- [Renewable energy](#)
- [Agro-processing and food security projects](#)
- [Garden Route Special Economic Zone \(SEZ\)](#)
- [ICT](#)
- [Manufacturing \(the marine and aviation manufacturing Project\)](#)
- [Property development projects](#)

- [Skills development and training](#)
- [Sustainable water and sanitation](#)
- [Tourism](#)
- [Transport](#)

6.2 Companies

Some of the companies based in the Garden Route are shown in the table below:

Table 11: Selected companies in Garden Route district

COMPANY NAME	TOWN	SECTOR	BUSINESS ACTIVITY
Alcare Aloe	Albertinia	Agribusiness	Aloe beauty/health products
Aloe Ferox Africa	Albertinia	Agribusiness	Aloe beauty/health products
Calitzdorp Spa	Calitzdorp	Tourism	Catering & Accommodation
Cape Pine	George	Manufacturing	Wood
Distell	George	Logistics	Logistics and Distribution
Datadot Technology South Africa (Pty) Ltd	George	Manufacturing	Vehicle Security
Fancourt	George	Tourism	Hospitality and Real Estate
Fechters Furniture Manufacturers	Knysna	Manufacturing	Furniture
Fuzzy Logic	George	Film and media	Multimedia
Garden Route Casino	Mossel Bay	Tourism	Catering & Accommodation
Golden Harvest FPM	George	Agribusiness	Food & Beverages
Klein Karoo International	Oudtshoorn	Agriculture	Food & Beverage
Lancewood	Wilderness	Agriculture	Dairy-processing
Merchants	George	Business Services	Business Process Outsourcing
Morning Milk	George	Agriculture	Food-processing
Mosstrich Pty Ltd	Mossel Bay	Agriculture	Food & Beverages
Nikwaflora	George	Agriculture	Foliage
Oakhurst Insurance Company Ltd	George	Services	Insurance
Petro-SA	Mossel Bay	Manufacturing	Oil and Gas
Rheebok Bricks	Mossel Bay	Manufacturing	Construction materials
Robbeberg Fine Foods	Plettenberg Bay	Agriculture	Food-processing
Robins Nest Interiors	Knysna	Manufacturing & Services	Interior design & production
SA Breweries	George	Agriculture	Viticulture
Safari Ostrich Farm	Knysna	Tourism	Catering & Accommodation
Specialised Solar Systems	George	Renewable Energy	Solar energy
Turnkey Water Solutions	Hessequa	Manufacturing	Water
Tradelink	George	Manufacturing	Clothing manufacturing
Travelstar	Knysna	Manufacturing	Motorhome design & vehicle conversion

Source: *Who Owns Whom, 2024, Wesgro's Top 100 Exporters, Garden Route District Municipality, 2022*

7. Tourism

Stretching from Witsand to Plettenberg Bay, Oudtshoorn, Calitzdorp and Ladismith on the world-renowned Route 62, the Garden Route and Klein Karoo (GR & KK) is a place of immense natural beauty, offering an abundance of adventure, world class golf courses and award-winning dining experiences.

This section provides an overview of the tourism trends and patterns in the Garden Route district. The findings will illustrate key visitor trends obtained from the Mobile Location Data Insights¹. It includes the sample size, length of stay, as well as the origin of both domestic and international tourists into the region.

The statistics discussed in this section are from **mobile location data insights**.

What is mobile location data?

- This is 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 does not represent 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.

Factors influencing the International and Domestic Sample Counts:

The volume of mobile location data capture counts is influenced by several factors including but not limited to:

Data Source Variability

- Changing volume of mobile applications collecting and sharing data
- Data privacy and regulatory changes affecting sharing of data (GDPR, mobile OS policy changes etc.)

Data Collection and Processing Variability

- Mobile network and internet connectivity
- Mobile infrastructure technical issues (hardware failures, solar flare activity)
- Tourist logic to segment tourist from non-tourist mobile devices

Mobile Use Variability

- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

While all mobile devices are affected by above, International mobile device counts are affected more than Domestic mobile devices when it comes to both mobile use fluctuations and data privacy restrictions. Tourists use their phones differently when travelling internationally – they may want to avoid additional out of country fees and only use their phone through wi-fi service. Tourists may not use the partnership apps they normally do while on extensive holiday. Restricting data privacy laws are also affecting the international landscape affecting data that can be shared which may affect processing that identifies tourists.

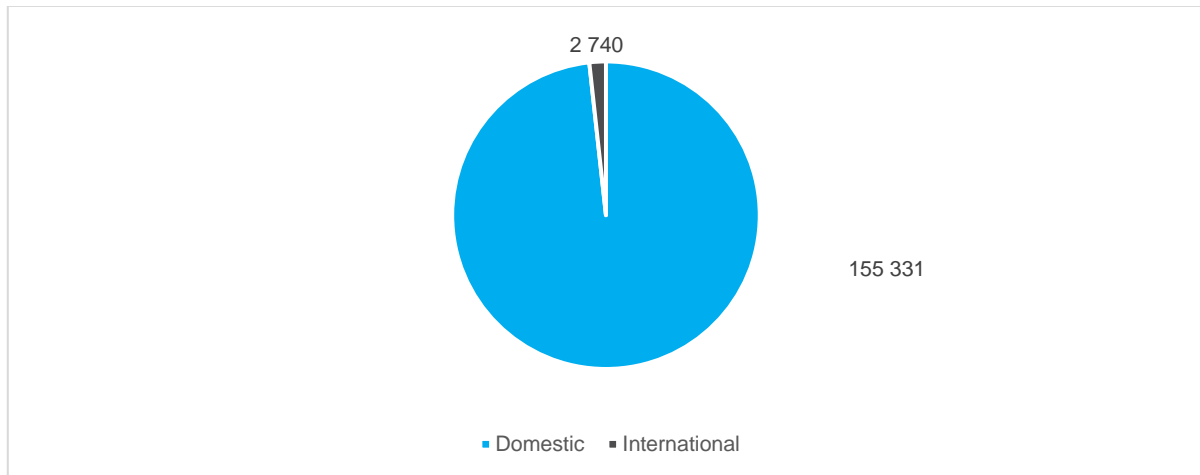
Source: ROVE, 2023

7.1 Garden Route and Klein Karoo mobile location data insights

Shown in figure 14 below are the insights of the mobile location data of domestic international tourists who visited the Garden Route and Klein Karoo region between January – December 2023.

As indicated in Figure 14 below, 155, 331 visitors who completed the sample were domestic visitors. While some 2, 740 visitors identified as international tourists during the period. This was a combined total of 158, 071 visitors to the region in 2023. Of this sample, 98.27% were domestic visitors and 1.73% were international visitors.

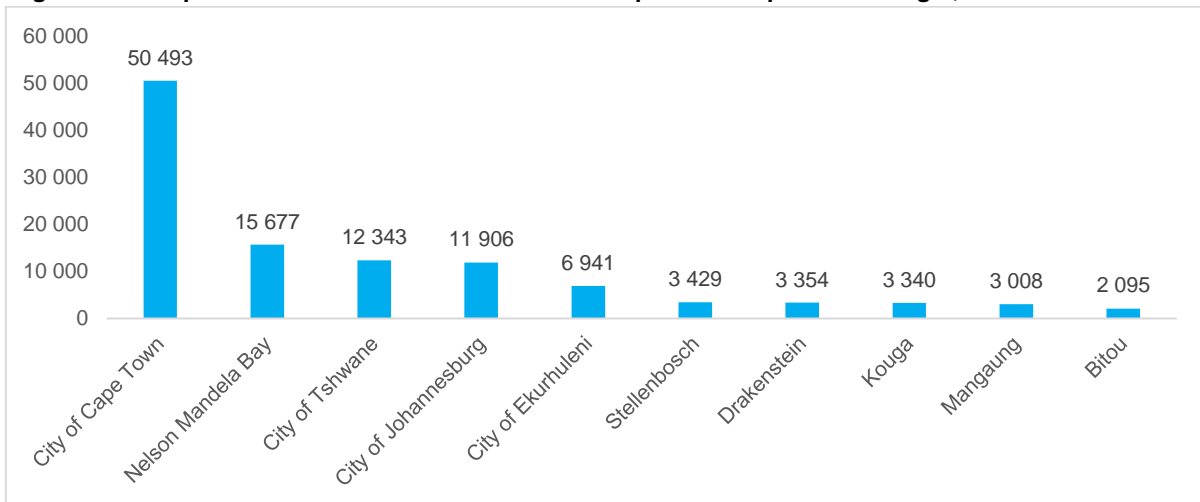
Figure 14: Sample size of domestic and international visitors to the Garden Route and Klein Karoo region, 2023



Sources: Rove, 2023

Within the domestic data set over 50 000 of the sampled tourists were from the City of Cape Town.

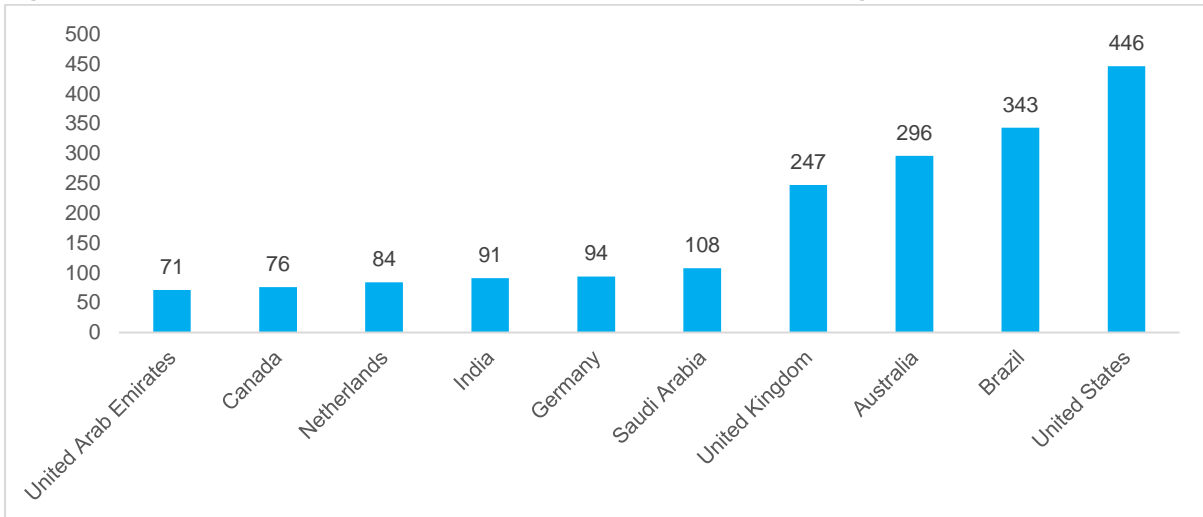
Figure 15: Sample size of domestic visitors from the top 10 municipalities of origin, 2023



Sources: Rove, 2023

For international tourists, the greatest number of international visitors were from the United States (446), as shown in figure 16 below.

Figure 16: Sample size of international visitors from top 10 countries of origin, 2023

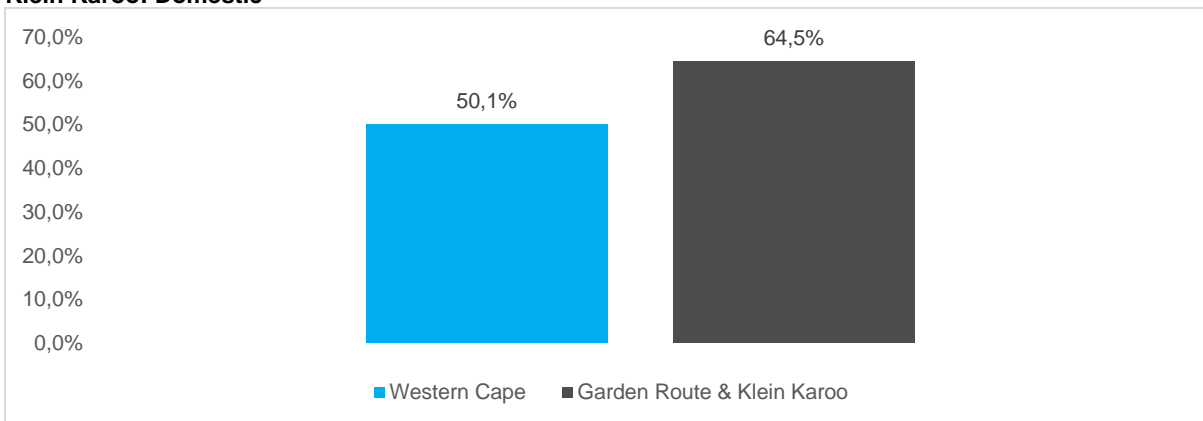


Sources: Rove, 2023

7.2 Mobile insights: Domestic visitor trends

Figure 17 shows that over 60% of the sampled domestic tourists stayed overnight, which is higher than the general average for the province 50.1%.

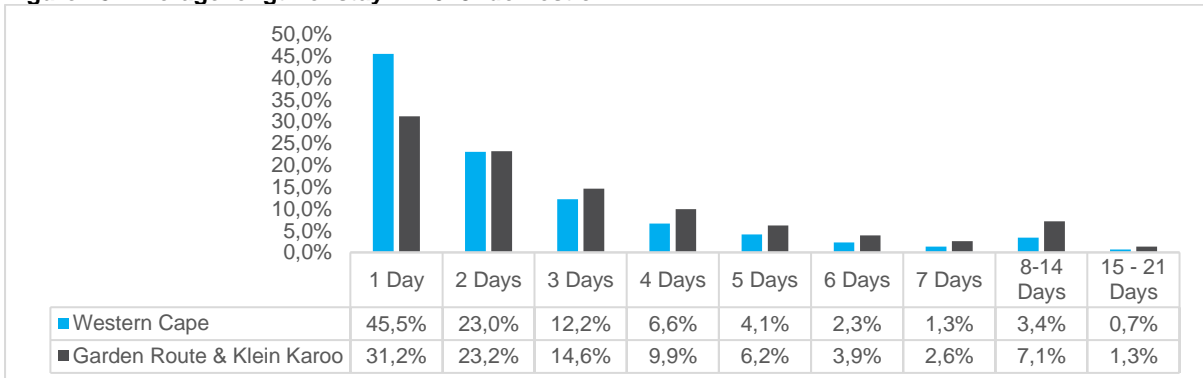
Figure 17: Percentage of sample who stayed overnight in the Western Cape and the Garden Route and Klein Karoo: Domestic



Sources: Rove, 2023

On average, domestic visitors spent between one and three days in the Garden Route and Klein Karoo as well as in the Western Cape. This is shown in Figure 18.

Figure 18: Average length of stay in 2023: domestic.

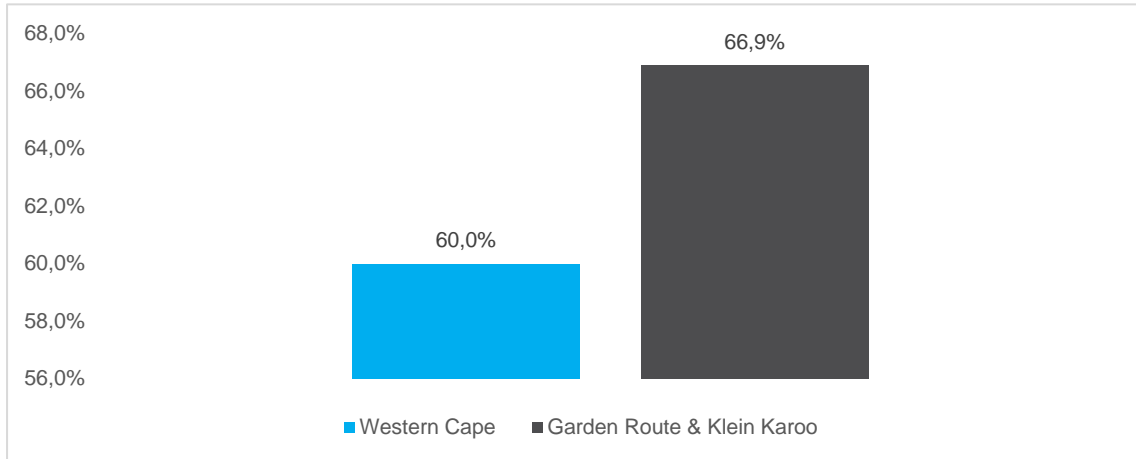


Sources: Rove, 2023

7.3 Mobile insights: International visitor trends

Figure 19 below demonstrates that 66.9% of the sample were international tourists who stayed in the Garden Route and Klein Karoo, whereas the Western Cape attracted 60.0% of international visitors.

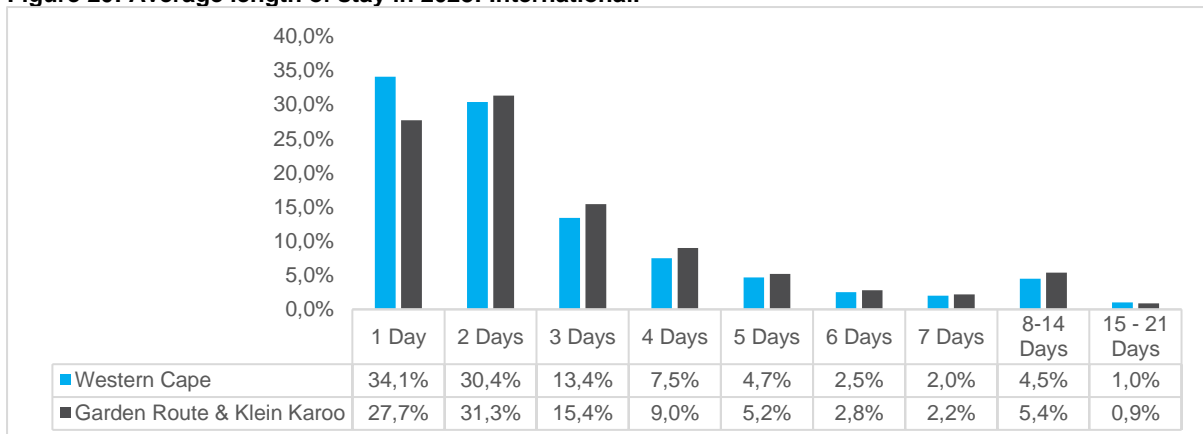
Figure 19: (%) of sample who stayed overnight in the Western Cape and the Garden Route and Klein Karoo: International



Sources: Rove, 2023

The average length of stay by international tourists was between one and two days for both the Western Cape and the Garden Route and Klein Karoo. However, a few visitors managed to stay for more than two weeks in the province as well as in the region (as shown in figure 20).

Figure 20: Average length of stay in 2023: International.

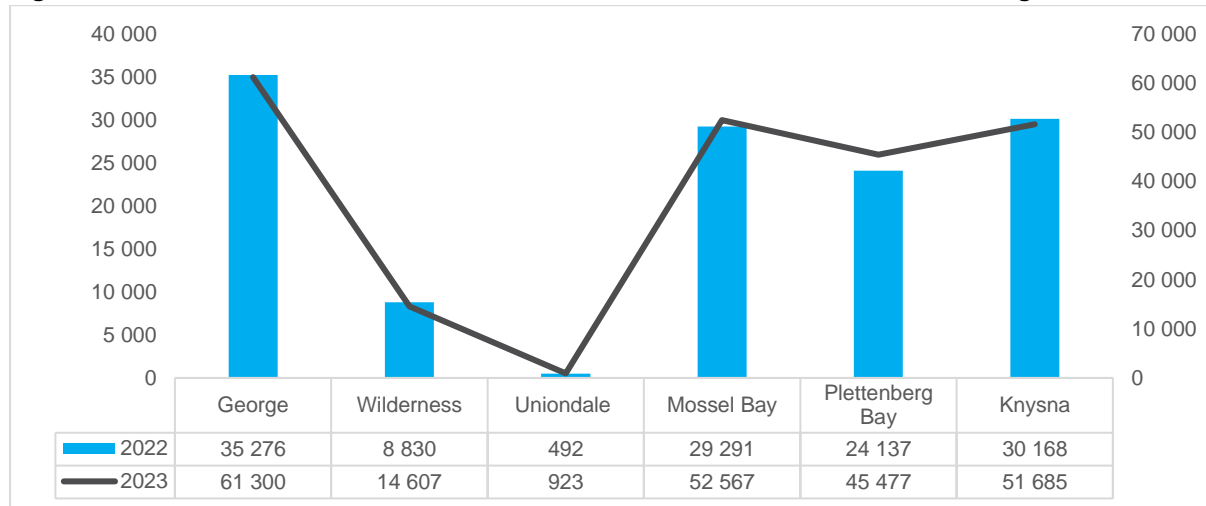


Sources: Rove, 2023

7.4 Visitor trends for select towns in Garden Route & Klein Karoo

Among the seven towns in the Garden Route region, George attracted the highest number of domestic tourist arrivals in 2023, at a total of 61, 300 visitors. This was followed by Mossel Bay at 52, 657 and Knysna at 51, 685.

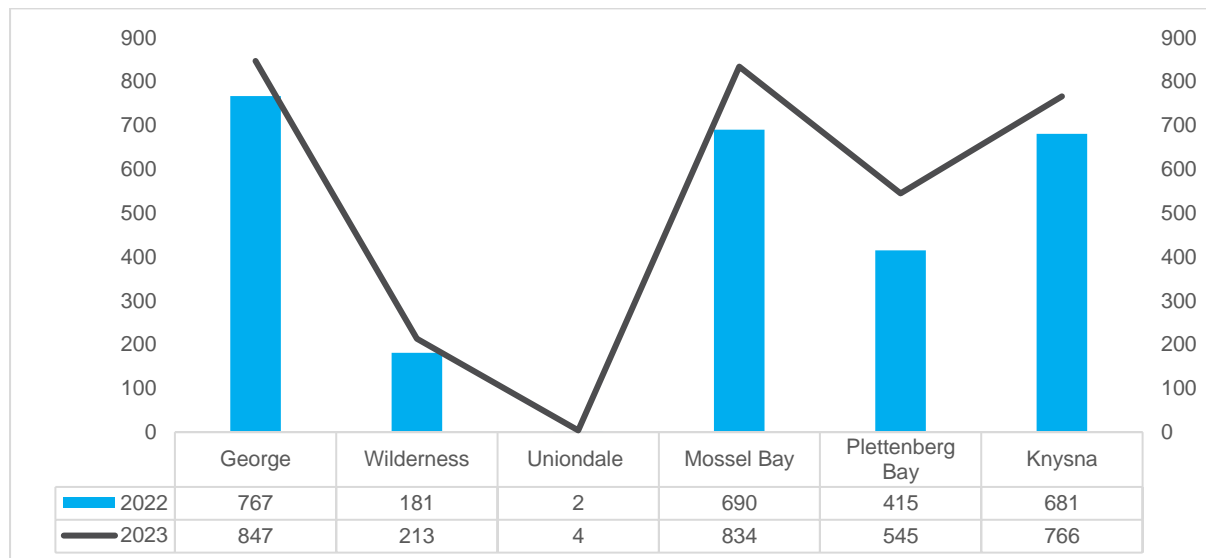
Figure 21: Number of domestic visitors to towns in the Garden Route and Klein Karoo region, 2022-2023



Sources: Rove, 2023

In terms of international tourists, George attracted the highest number in 2023, with 847 recorded in total. Mossel Bay followed in second place with 834 tourist arrivals, while Knysna recorded 766 tourist arrivals.

Figure 22: Number of international visitors to towns in the Garden Route and Klein Karoo region, 2022-2023

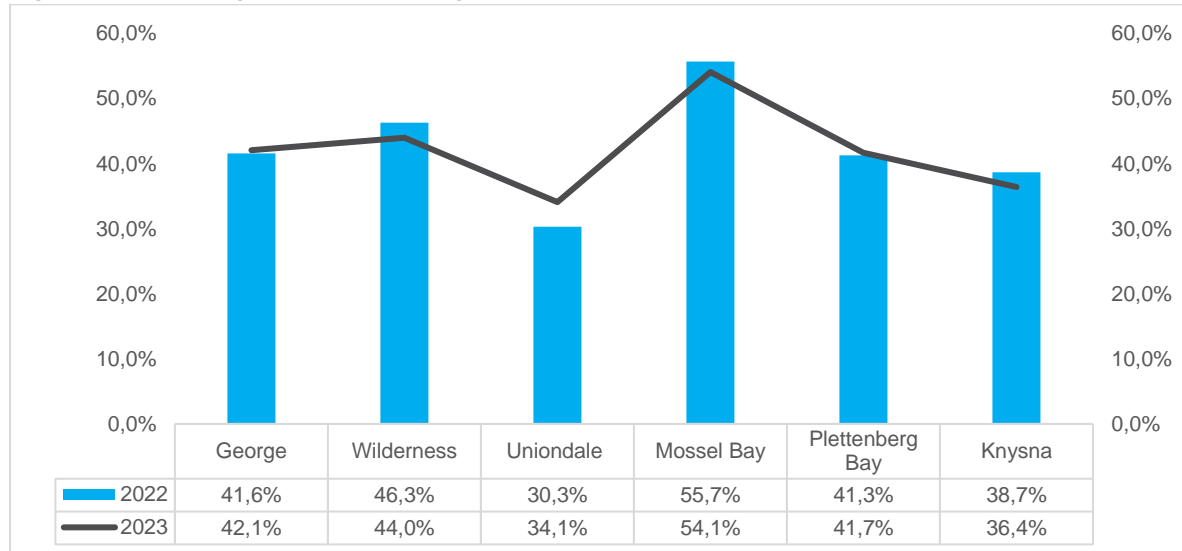


Sources: Rove, 2023

Domestic

The greatest share of domestic visitors to the GR & KK stayed overnight in Mossel Bay in both 2022 55.7% and 2023 54.1%. This was closely followed by visitors who stayed overnight in Wilderness and George, as seen in Figure 23.

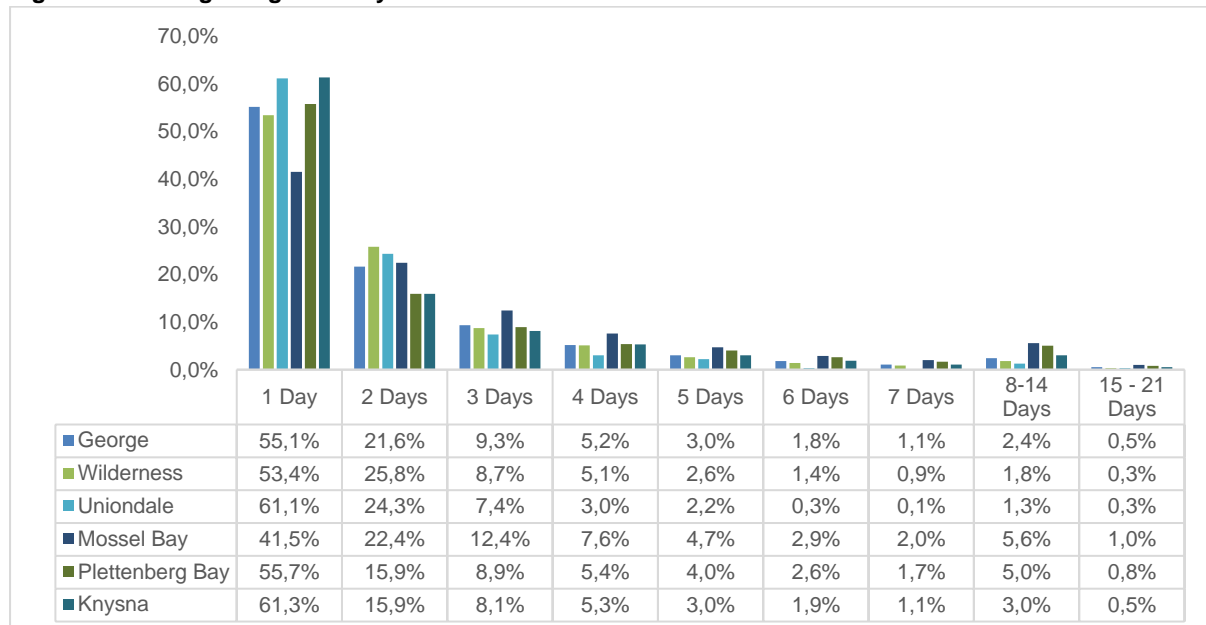
Figure 23: Percentage domestic overnight visitors, 2022-2023



Sources: Rove, 2023

Figure 24 shows the average length of stay for domestic visitors to the GR & KK. The highest average was between one and two days.

Figure 24: Average length of stay 2023: domestic

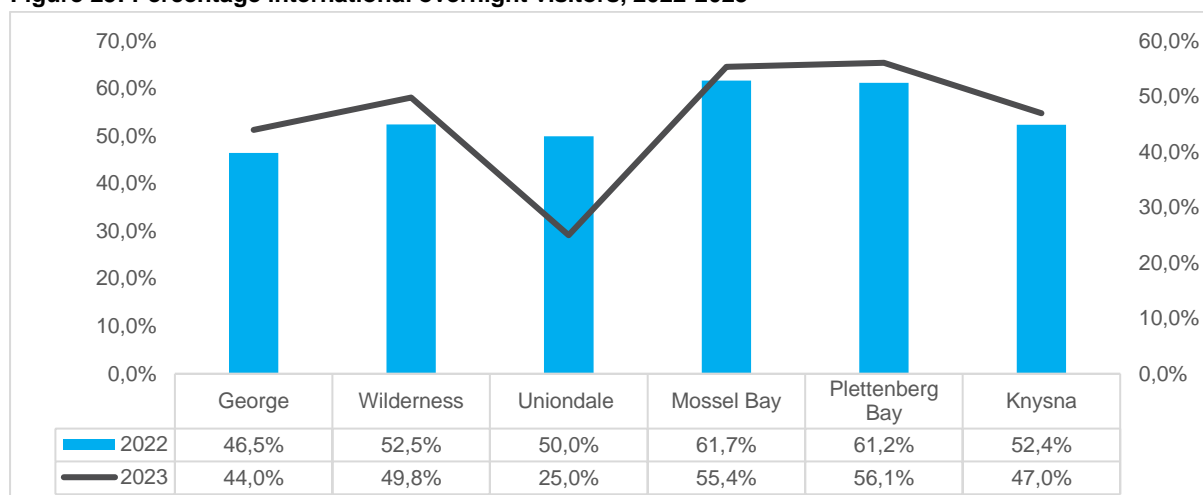


Sources: Rove, 2023

International

Figure 25 illustrates that in 2022 Mossel Bay attracted the highest share of international overnight visitors 61.7%. However, this changed in 2023 with Plettenberg bay taking the lead with its share of 56.1% of international visitors. Wilderness and Knysna were also popular destinations for international overnight visitors in 2023.

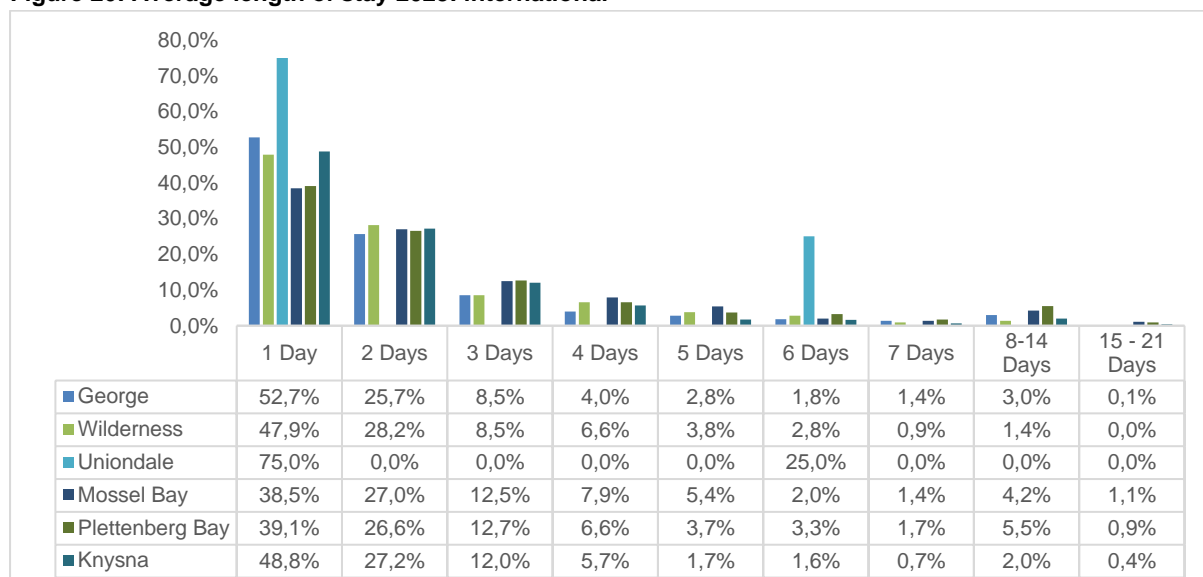
Figure 25: Percentage international overnight visitors, 2022-2023



Sources: Rove, 2023

International visitors to the towns listed in Figure 26 spent between one to two days in the region.

Figure 26: Average length of stay 2023: international



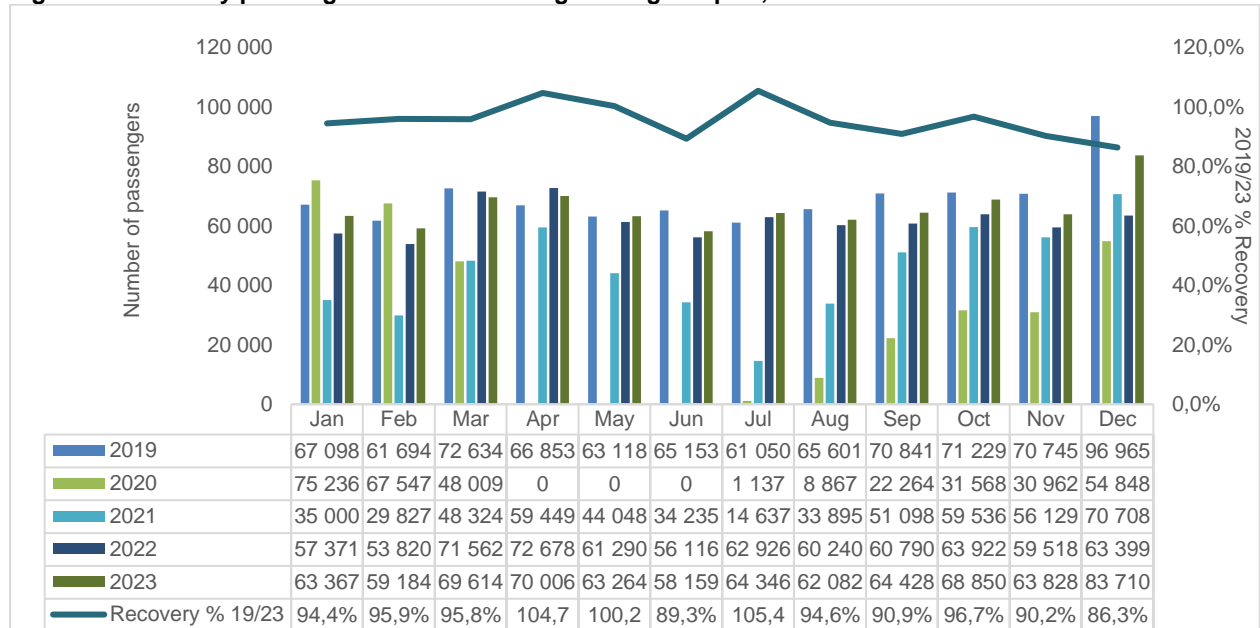
Sources: Rove, 2023

7.5 George airport passenger movement

Figure 27 provides insights into the two-way passenger movement through the George Airport between 2019 and 2023. The airport recorded over 790 000 two-way passenger arrivals in 2023; a 6.3% y-o-y increase when compared to 2022 arrivals. According to the Airports Company of South Africa (ACSA), the airport is not only a centre for travellers but is also a distribution hub for cargo such as flowers, fish, oysters, herbs and ferns.

In 2023, December saw the greatest number of visitor arrivals, with 83, 710 recorded at the airport. This was followed by just over 70, 000 arrivals in April. The increasing popularity of the region as a tourist destination is expected to increasingly boost air traffic to the area.

Figure 27: Two-way passenger movement through George Airport, 2023



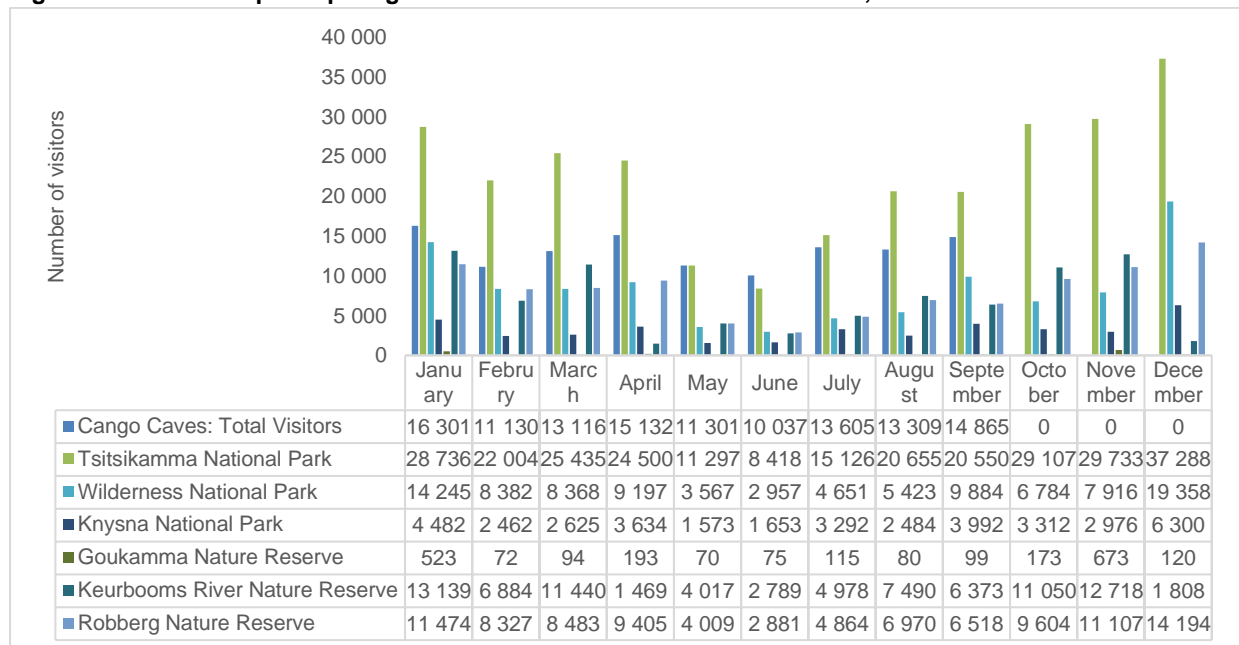
Source: ACSA, 2023

Garden Route & Klein Karoo attractions

The Garden Route & Klein Karoo is world famous and attracts many visitors, both domestic and international. A total of 715, 440 visitors were welcomed at participating Garden Route and Klein Karoo attractions in 2023. Tsitsikamma National Park recorded the highest number of visitors (272, 849), followed by the Cango Caves (118, 796) and the Wilderness National Park (100, 732). This is shown in Figure 28 below.

During the period under review, most tourists visited during the spring and summer months from September to February. The greatest decline in numbers occurred during the months of June to August.

Figure 28: Visitors to participating Garden Route & Klein Karoo Attractions, 2023



Source: SanParks, 2023; Cape Nature, 2023

8. Film



Whether you are looking for white beaches, rugged rocky coastlines, lagoons, lakes, mystic forests, mountains, vibrant pastures, or even semi-arid desert, the Garden Route has it all. World-renowned as a tourist destination with a Mediterranean climate, the region is the ideal location for your next production. It has an abundance of diverse, scenic landscapes in close geographic proximity, and well-developed infrastructure.

KEY INFORMATION

The Garden Route and Klein Karoo Film Office has been formed and established and is now fully operational with elected board members and an ever-growing membership list consisting of production houses, studios and all other relevant suppliers to the industry.

Producers can contact info@grkk-filmoffice.co.za, which is supported by the Garden Route District and the other Municipalities. The Garden Route and Klein Karoo Film Office will assist in obtaining the necessary permits and will function as the one-stop service to the industry. During productions, when shooting on public property, or if the shoot has an impact on others or the environment, one must obtain a permit. This includes:

- Commercials
- If filming has an impact on traffic/pedestrians
- If planning to use dollies, wires, tripods, generators, drones, etc.
- If planning to use public spaces in a different or distinct way

For access to Cape Nature and SANParks locations, the normal processes still must be followed through those entities. There are more options available though, e.g. a larger variety of accessible beaches than in some cities.

CONTACT

Garden Route Film Commission

Permit Admin

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Website: www.gardenroutefilmcommission.com

Wesgro Film and Media Promotion Unit

Tel: +27 21 487 8600

Email: film@wesgro.co.za

Website: www.wesgro.co.za

TABLE 12: FILMS SHOT ON LOCATION	
Films	Born to Win, Klein Karoo, Knysna, Faan se Trein, Fiela se Kind, The Breed, Lord of War, Tomb Raider, Pad na Jou Hart, Abraham, Die Spook van Uniondale
TV Series	Bear Grylls: Mission Survive S2, The Bachelor Finland S1 and S2, Black Sails, Crusoe, Troy: Fall of a City, Padlang, First Man, Snuffelsmous, Love Island, Temptation Island, The Bachelor and The Bachelorette

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