



Garden Route & Klein Karoo

Annual 2023

Tourism Trends

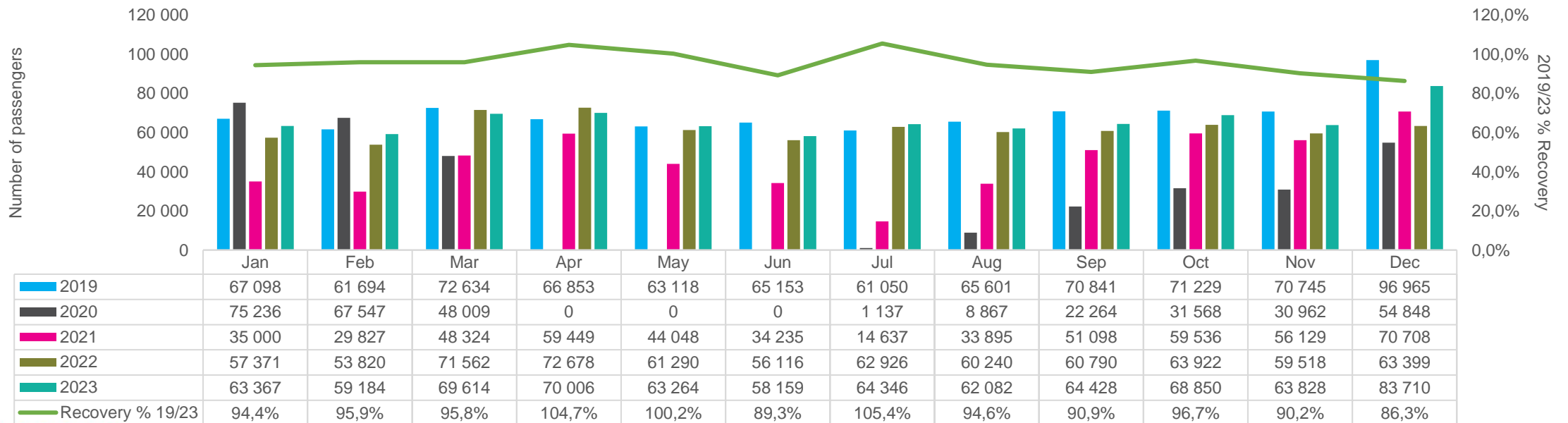
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1. George Airport Passenger Movement

- George Airport recorded over 790 000 two-way passenger arrivals in 2023; a 6.3% y-o-y increase when compared to 2022 arrivals. This is shown in Figure 1.
- 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 traffic to the area.

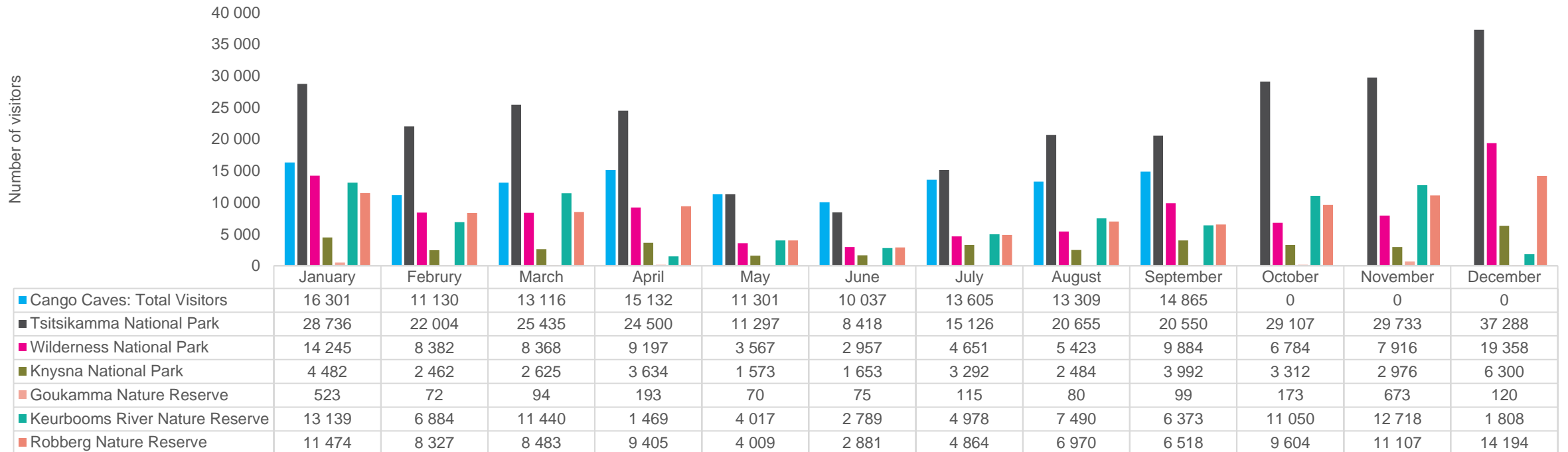
Figure 1: Two-way Passenger Movement Through George Airport (2023)



2. Garden Route & Klein Karoo Attractions

- The GR & KK region 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 (GR & KK) 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 2.
- 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 2: Visitors to Participating GR & KK Attractions (2023)



2. Garden Route & Klein Karoo Attractions

- The Cango Caves welcomed a total of 118 796 visitors from January to September 2023. Of these 44 802 visitors were from the domestic market. Figure 3 shows that the month of September in 2023 had the highest year-on-year growth rate 45%, compared to September 2022.
- In total, a 7.8% growth was seen from the period Jan–Sep 2023 vs the same period in 2022.
- Nine countries were identified as key international source markets for visitors to the Cango Caves, with India, Germany and the United Kingdom ranking as the top three international source markets in 2023 as shown in Table 1.
- International tourists visiting the Cango Caves totaled 73 994 in 2023, significantly higher than domestic visitors (44,802).

Figure 3: South African Visitors to Cango Caves (2023)

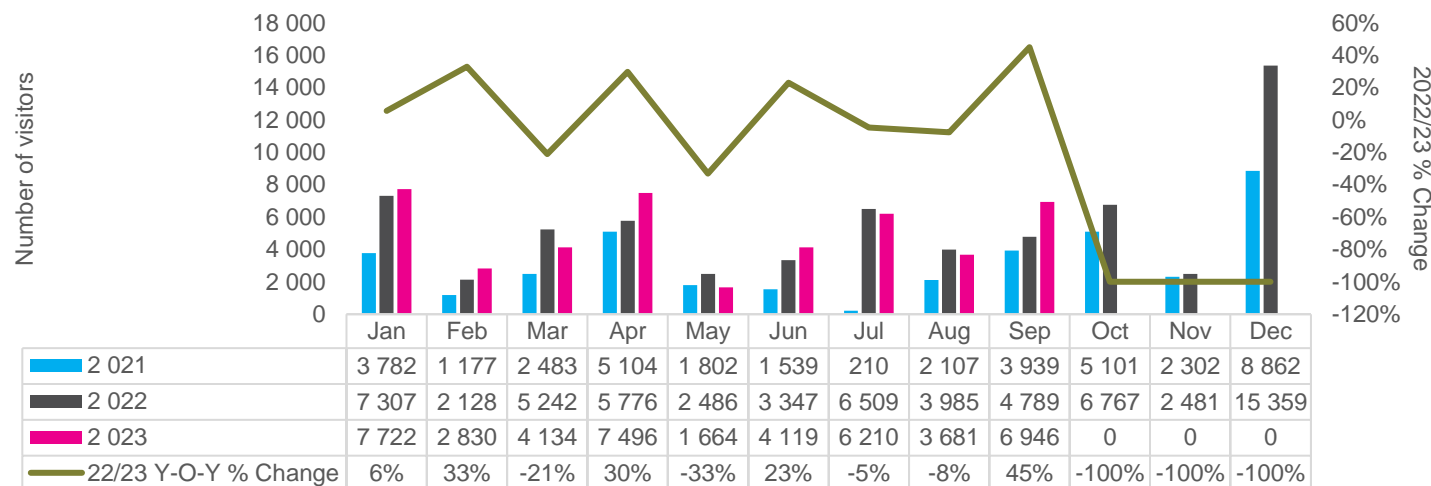


Table 1: Overseas Source Markets for Cango Caves (January – September 2023*)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
India	718	491	600	1 144	5 911	3 573	1 663	1 139	1 097	16 336
Germany	2 139	2 451	3 527	2 348	767	297	876	1 482	1 698	15 585
United Kingdom	1 442	1 697	1 440	1 442	1 066	645	824	1 362	1 409	11 327
Holland	887	712	771	681	389	189	1 812	1 996	1 049	8 486
United States	566	651	668	562	627	411	520	534	547	5 086
France	228	301	262	146	73	107	115	251	186	1 669
Asia	109	51	114	147	99	75	53	210	215	1 073
Nordics	277	238	38	49	27	72	55	25	38	819

*Visitor numbers from the Cango Caves were not available for the period Oct–Dec 2023 at the time of publishing.

Source: Cango Caves, 2023

Visitor Trends Mobile Location Data Insights

3. GR & KK 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 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 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.

Figures 4,5 and 6 demonstrate that the insights in this report represent mobile location data from a sample of 155 331 domestic and 2 740 international tourists who visited the GR & KK 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.

Figure 4: Sample Size of Domestic and International Visitors to the GR & KK

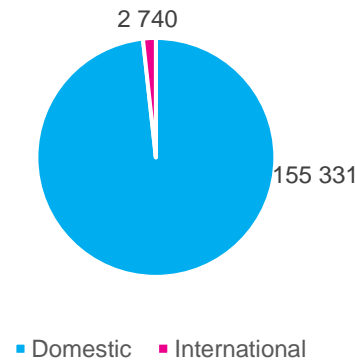


Figure 5: Sample Size of Domestic Visitors from Top 10 Municipalities of Origin, 2023

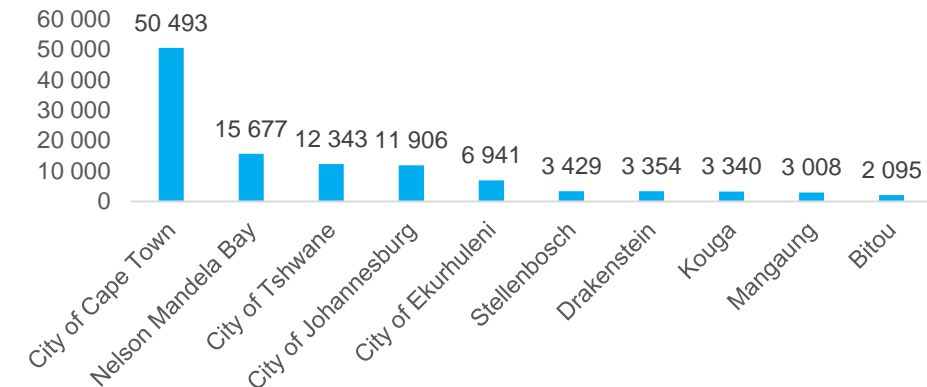
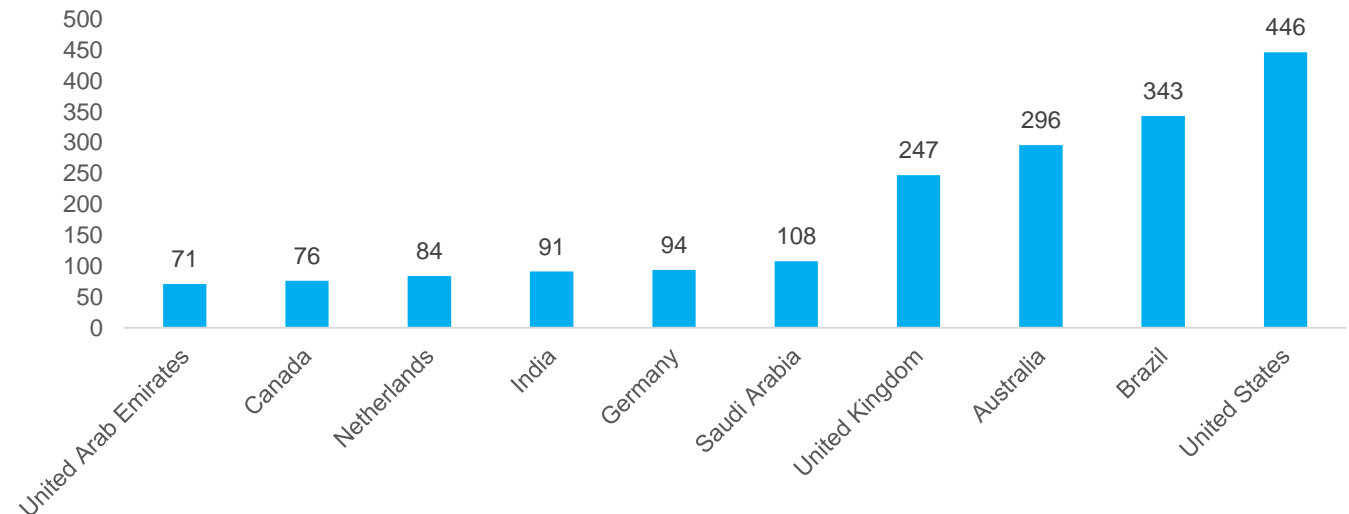


Figure 6: Sample Size of International Visitors from Top 10 Countries of Origin, 2023



Domestic Visitor Trends

WESGRO

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

An Inspiring Place To Do Business

3.1. Mobile Insights: Domestic Visitor Trends

- Figure 7 shows that over 60% of the sampled domestic tourists stayed overnight in the GR & KK, which is higher than the general average for the province 50.1%.
- On average, domestic visitors spent between one and three days in the GR & KK as well as in the Western Cape. This is shown in Figure 8.

Figure 7: Percentage of Sample who Stayed Overnight in the Western Cape and in the GR & KK 2023: Domestic

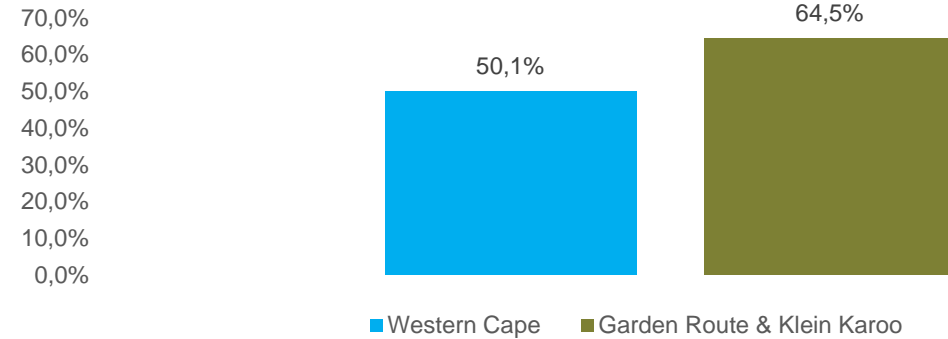
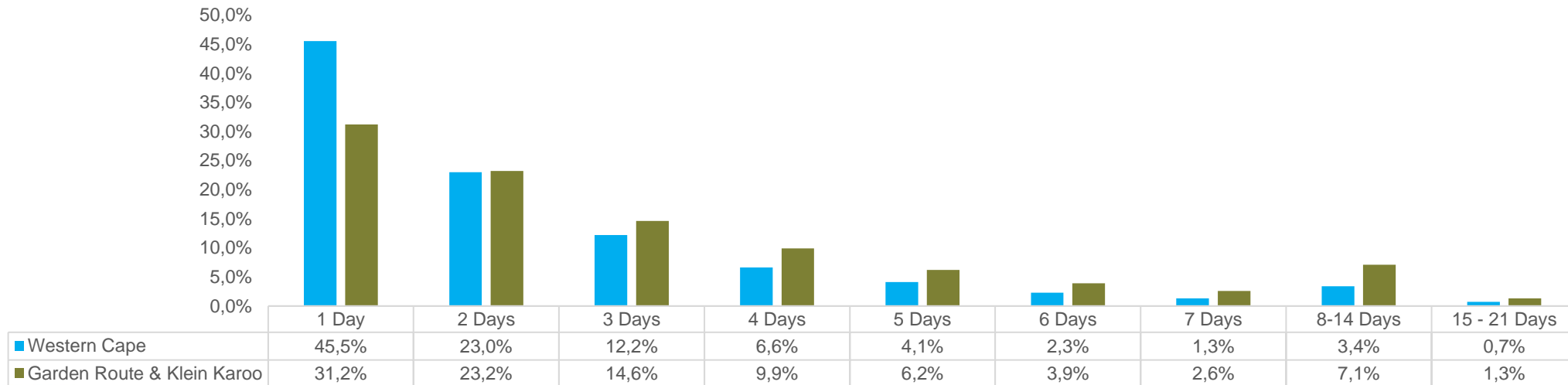


Figure 8: Average Length of Stay 2023: Domestic



3.1. Mobile Insights: Domestic Visitor Trends

- Figure 9 shows that arrival days for domestic visitors to the Western Cape and the GR & KK were largely later during the week from Thursdays to Sundays, with Fridays being the most popular day for arrivals.
- Departures from the region were mainly on Sundays 17.4% and on Mondays 16.4%, as seen in Figure 10.

Figure 9: Popular Arrival Days of the Week for Visitors to the Western Cape and in the GR & KK 2023: Domestic

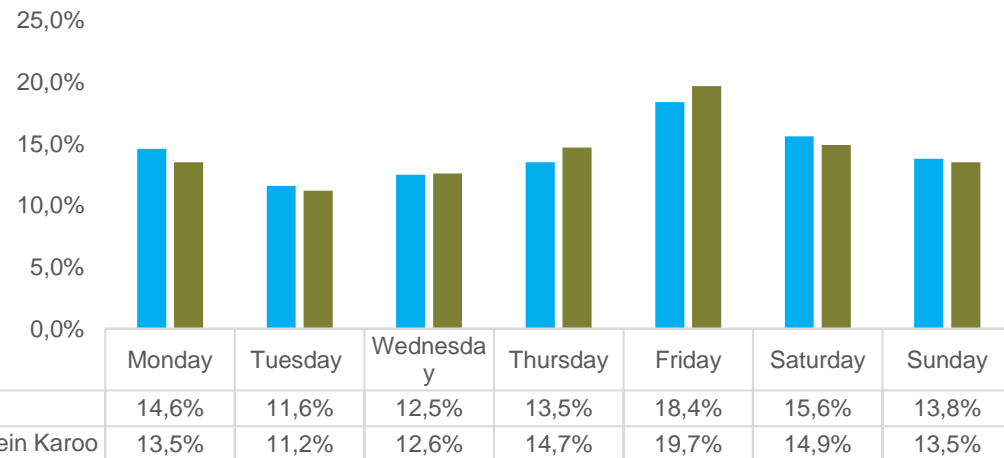
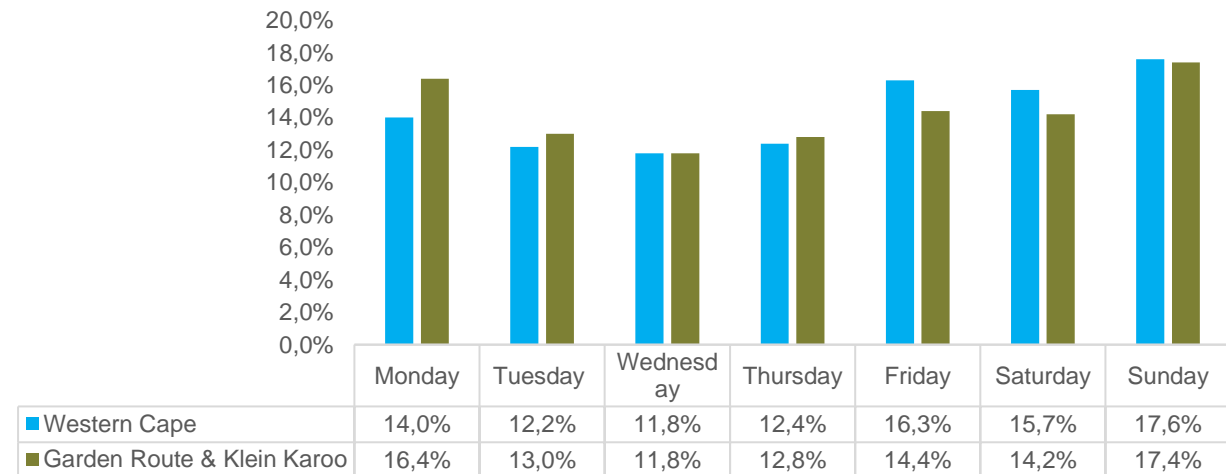


Figure 10: Popular Departure Days of the Week for Visitors Leaving the Western Cape and in the GR & KK 2023: Domestic



Source: Rove, 2023

International Visitor Trends

3.2. Mobile Insights: International Visitor Trends

- Figure 11 demonstrates that 66.9% of the sample were international tourists who stayed in the GR & KK, whereas the Western Cape attracted 60.0% of international visitors.
- The average length of stay by international tourists was between one and two days for both the Western Cape and the GR & KK. 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 GR & KK 2023: International

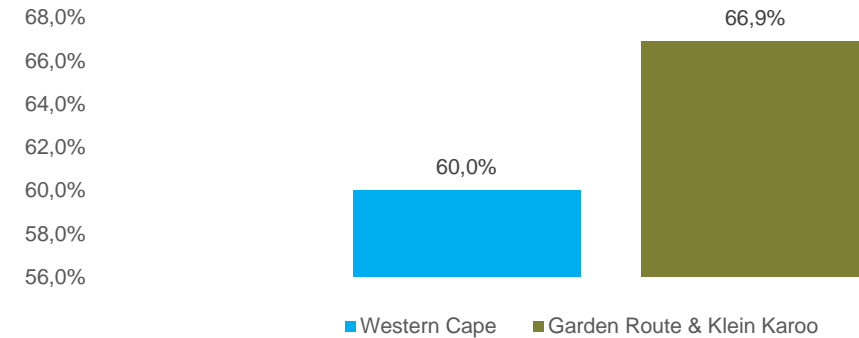
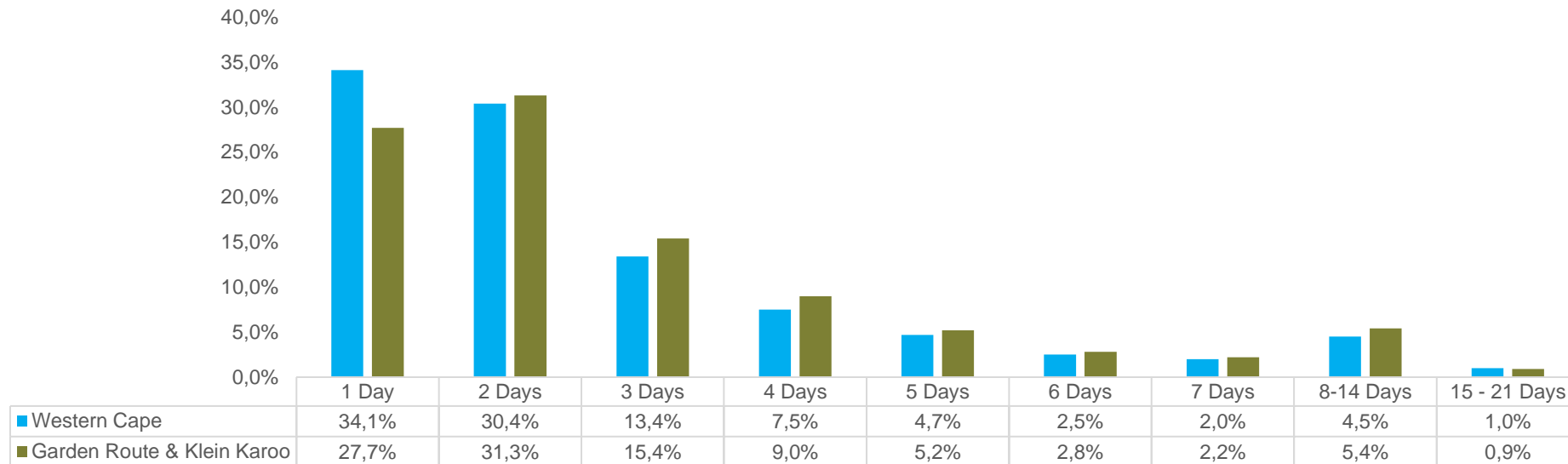


Figure 12: Average Length of Stay 2023: International



3.2. Mobile Insights: International Visitor Trends

- Arrival days for international visitors to the GR & KK were well distributed throughout the week with the greatest number of arrivals seen on Mondays 15.4% as well as on Sundays 15.2%. This can be seen in Figure 13.
- Figure 14 shows the popular departure days from the GR & KK which were Mondays 16.3% and Saturdays 14.6%.
- The Western Cape also had similar trends with international tourists arriving mainly on Fridays and Mondays, and departing on the same days as those leaving the GR & KK.

Figure 13: Popular Arrival Days for Visitors to the Western Cape and the GR & KK 2023: International

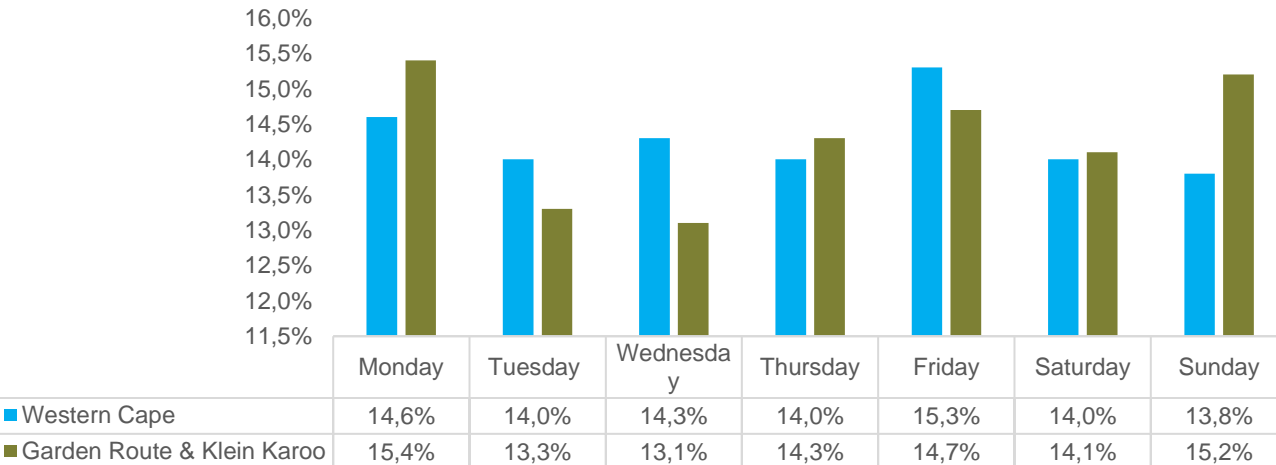
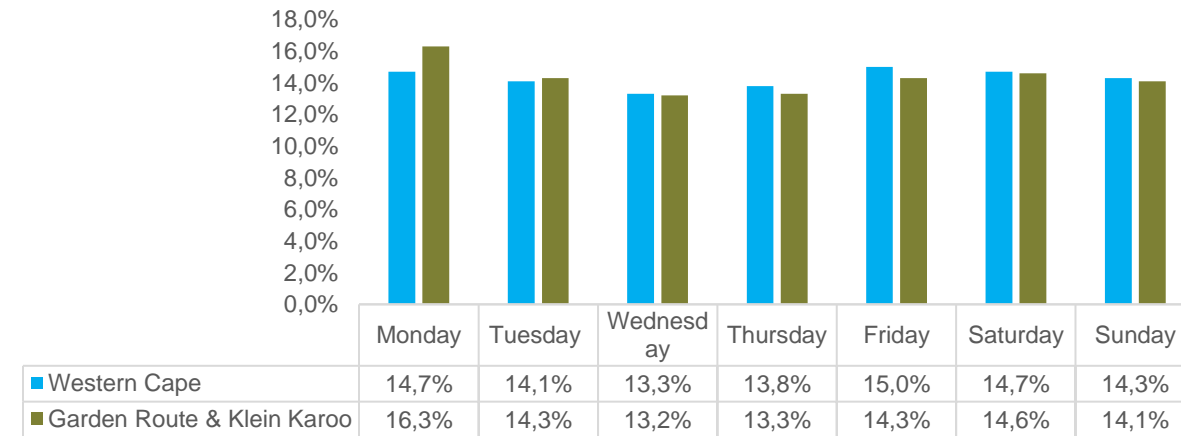


Figure 14: Popular Departure Days of the Week for Visitors Leaving the Western Cape and the GR & KK 2023: International



Source: Rove, 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, George attracted the highest number of tourist arrivals in both 2022 and 2023. A combined total of over 96 000 domestic and 1 614 international tourists visited the town in the two years.

During the same period, Mossel Bay attracted 81 858 domestic visitors while 81 853 tourists visited Knysna, as can be seen in Figure 18.

Figure 19 shows an increased growth in numbers of international tourists in 2023, in relation to tourist numbers recorded in 2022.

Figure 18: Domestic Sample Size (2023)

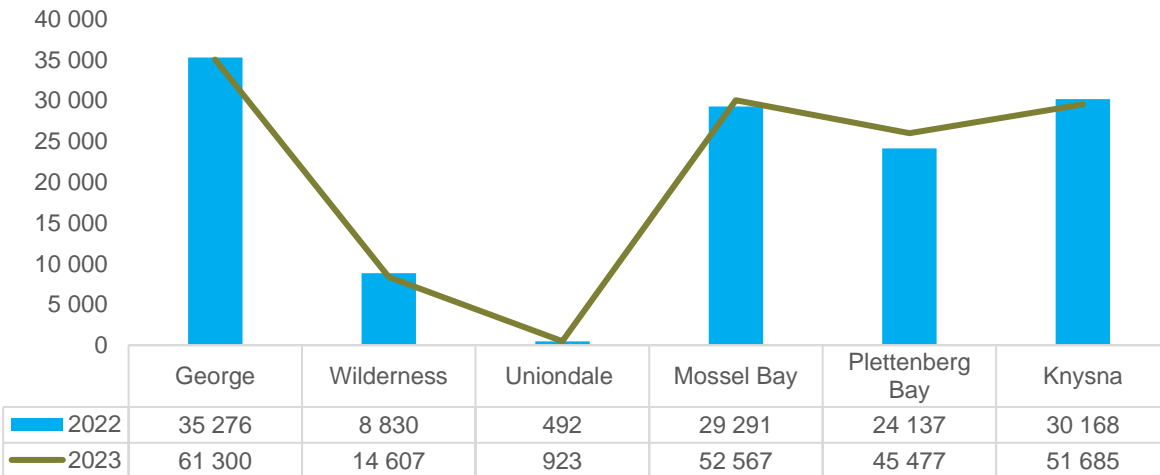
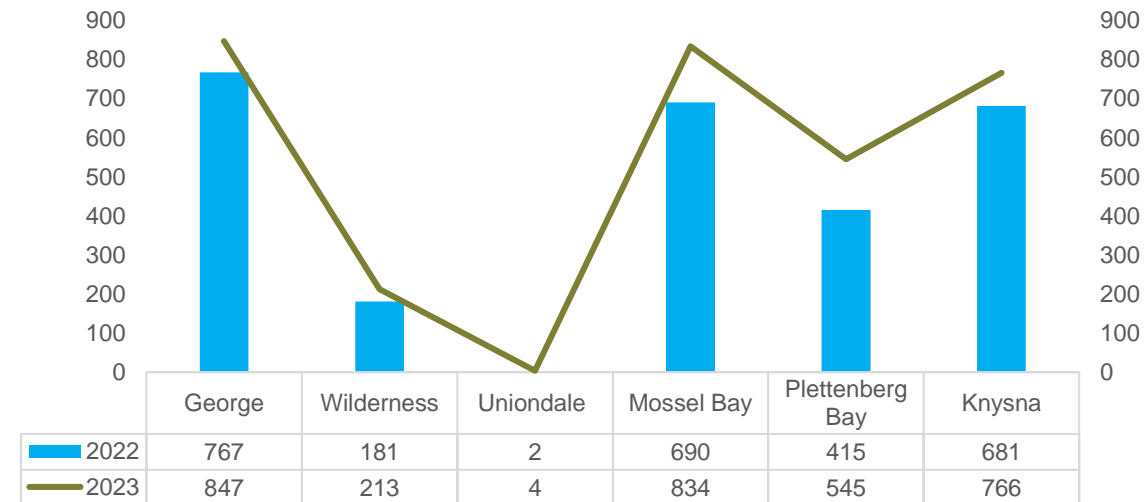


Figure 19: International Sample Size (2023)



4.2. Day and Overnight Visitors: 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 20.
- Figure 21 shows the average length of stay for domestic visitors to the GR & KK. The highest average was between one and two days.

Figure 20: % Domestic Overnight Visitors (2022--2023)

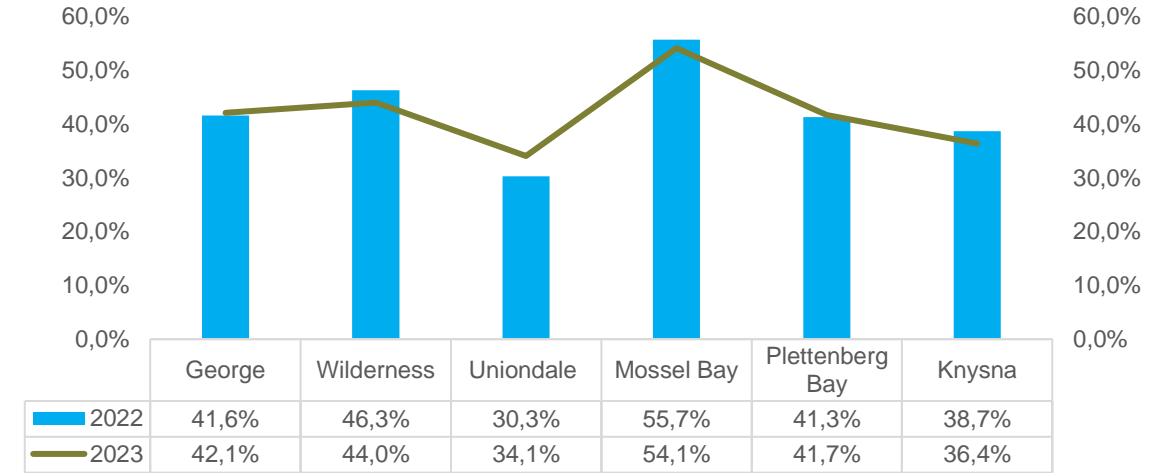
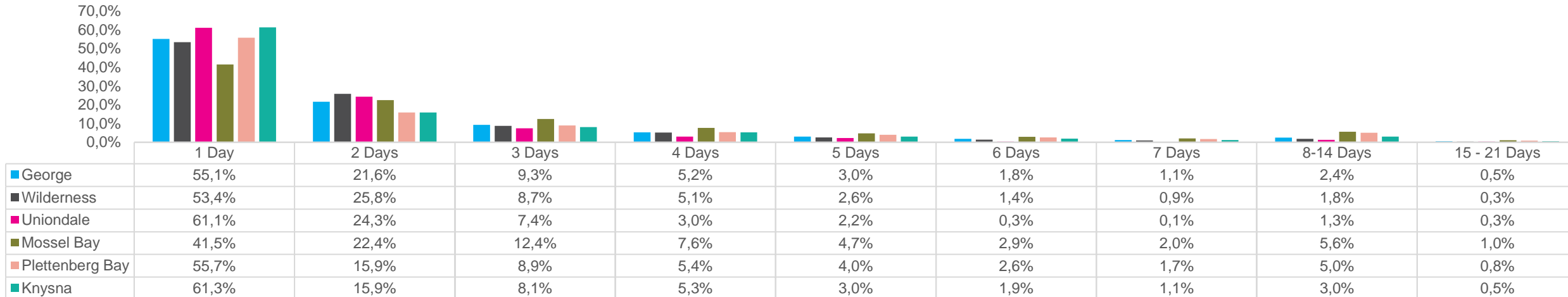


Figure 21: Average Length of Stay 2023: Domestic



4.3. Day & Overnight Visitors: International

- Figure 22 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 it's share of 56.1% of international visitors. Wilderness and Knysna were also popular destinations for international overnight visitors in 2023.
- International visitors to the towns listed in Figure 23 spent between one to two days in the region.

Figure 22: % International Overnight Visitors (2022–2023)

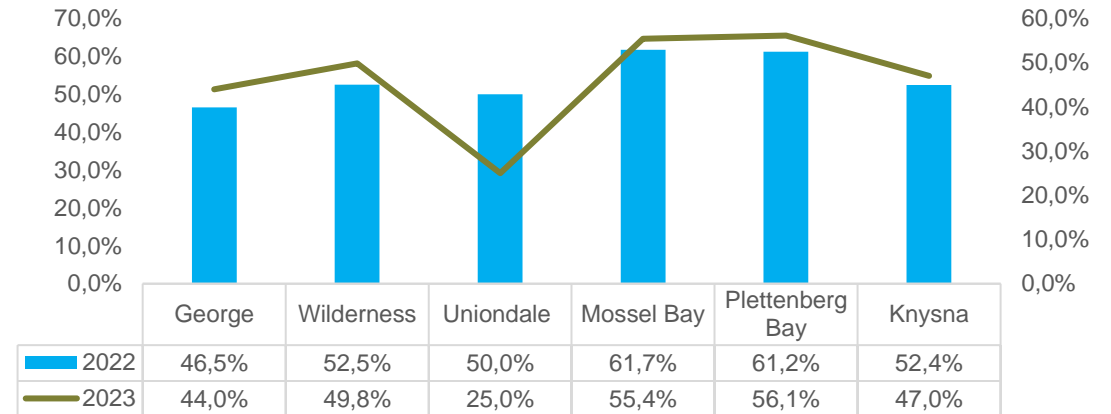
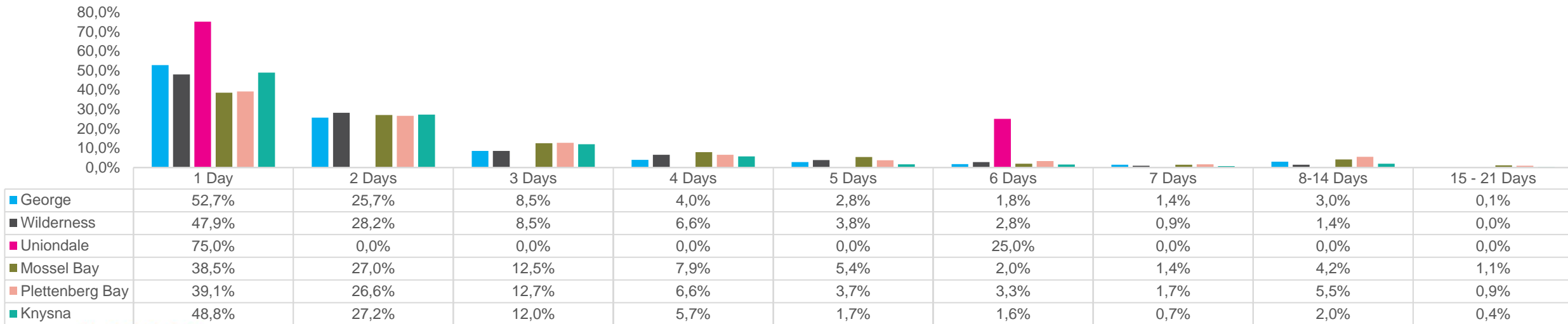


Figure 23: Average Length of Stay 2023: International



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

- Fridays and Saturdays were the most popular arrival days for domestic visitors to the towns, with over 90% of visitors arriving on these days, as shown in Figure 24. Mossel Bay had the highest share of visitors arriving on Fridays 18.4% with Wilderness attracting the highest proportion of visitors on Saturdays 18.6%.
- Tuesday was the least favoured day for arriving and departing for all towns analysed, particularly in Knysna and Wilderness where only 11.1% of domestic visitors chose Tuesday as their arrival day.
- Regarding departures, visitors left mostly on Sundays, as shown in Figure 25.

Figure 24: Popular Arrival Days of the Week 2023: Domestic

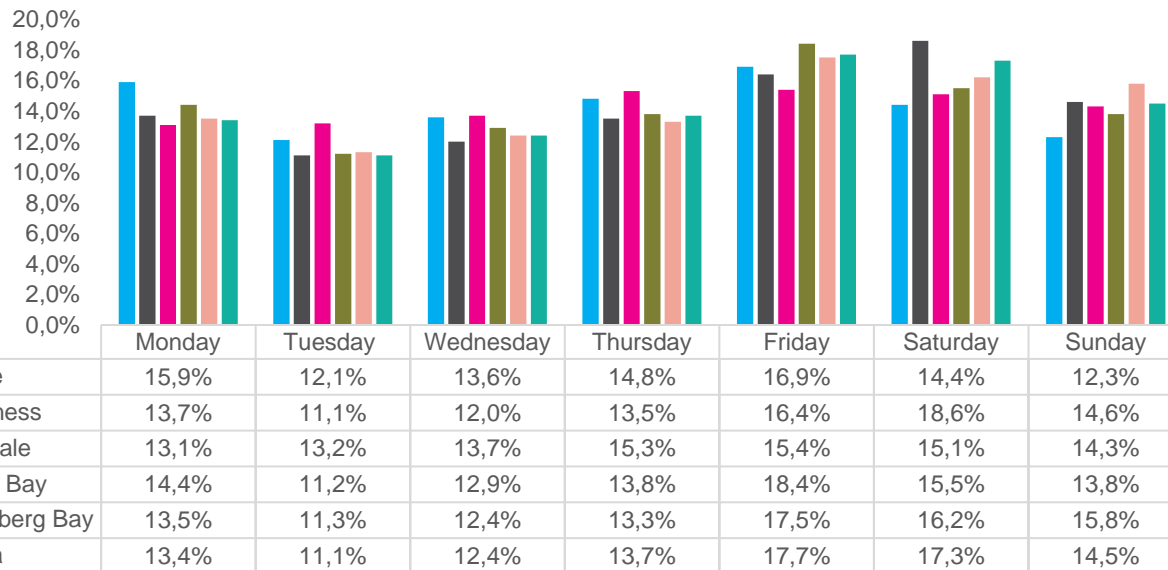
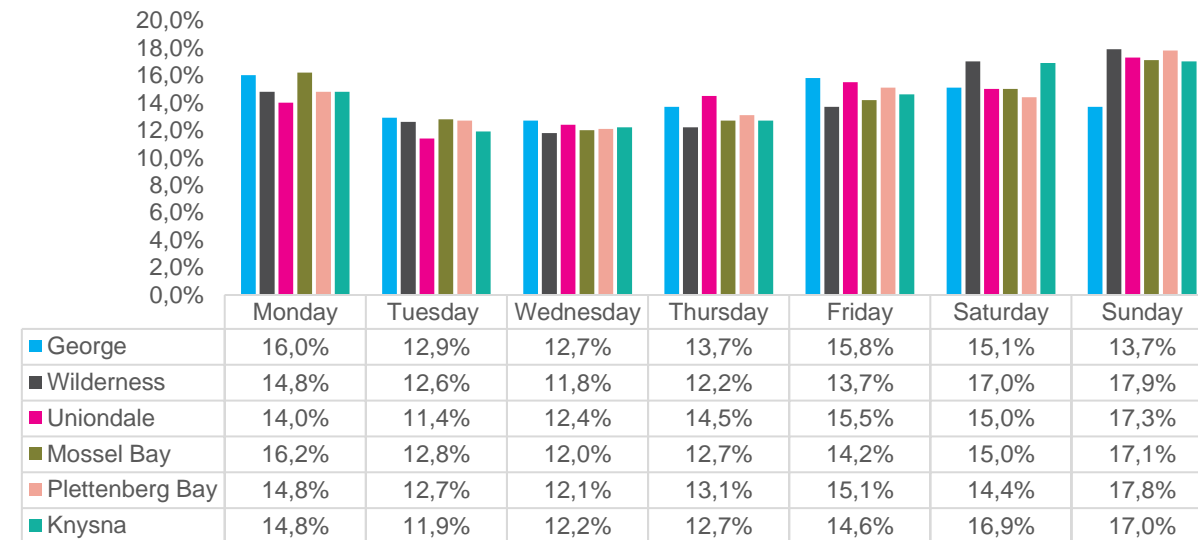


Figure 25: Popular Departure Days of the Week 2023: Domestic



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

- Figure 26 indicates that international visitor arrivals were mostly on Tuesdays and Fridays. Wednesdays and Thursdays were the second most popular arrival days. Uniondale, Mossel Bay and Wilderness had the highest share of arrivals on Fridays.
- Departure days for international visitors leaving these towns were generally Mondays, Tuesdays and Fridays, as shown in Figure 27.

Figure 26: Popular Arrival Days of the Week 2023: International

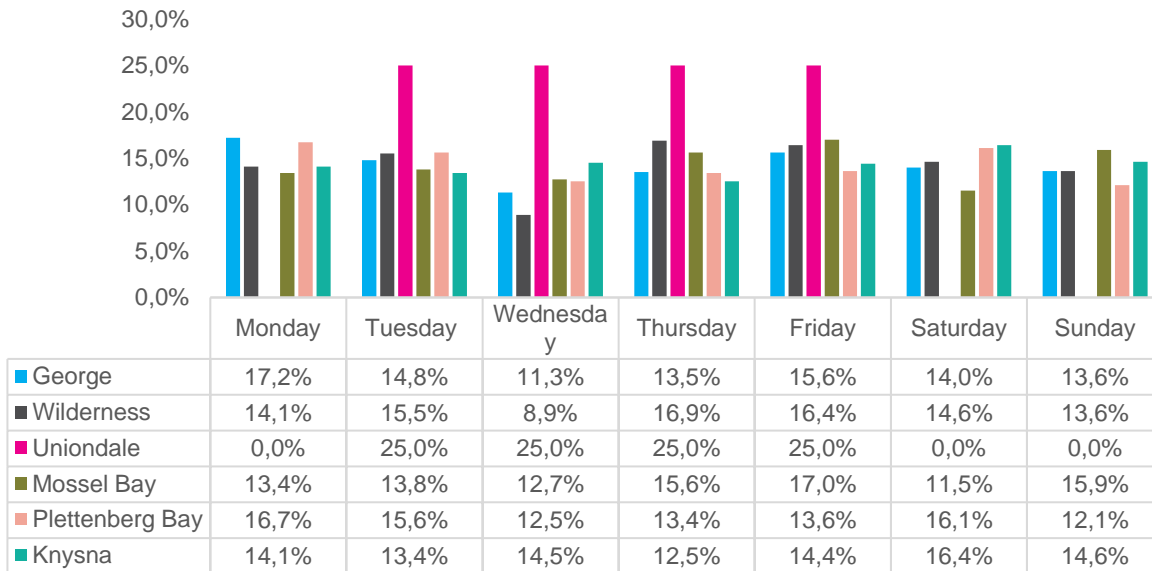
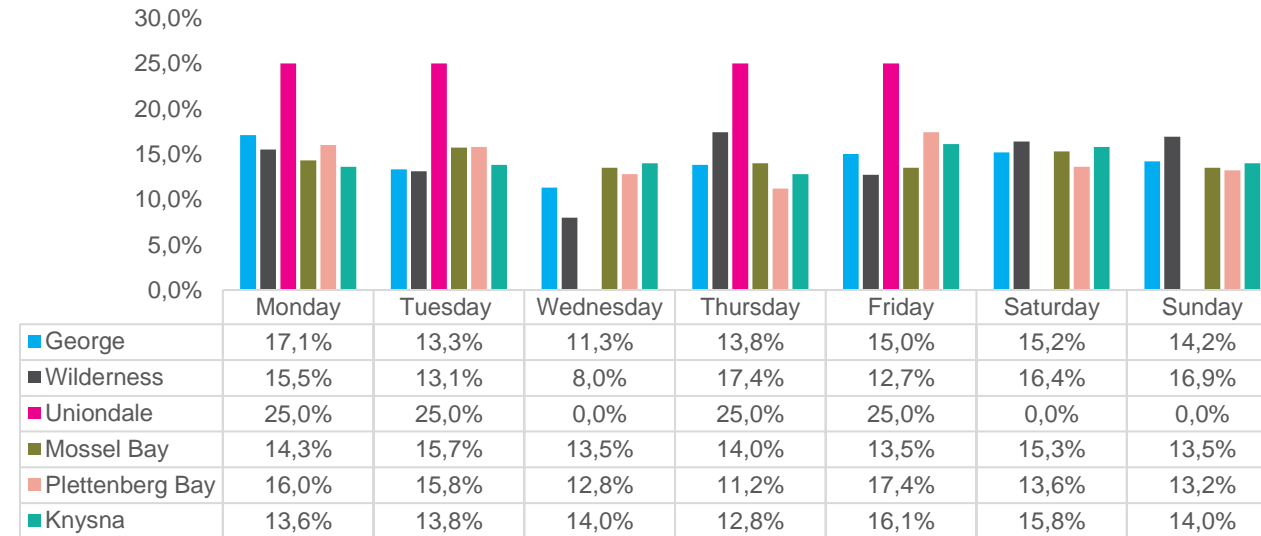


Figure 27: Popular Departure Days of the Week 2023: International



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

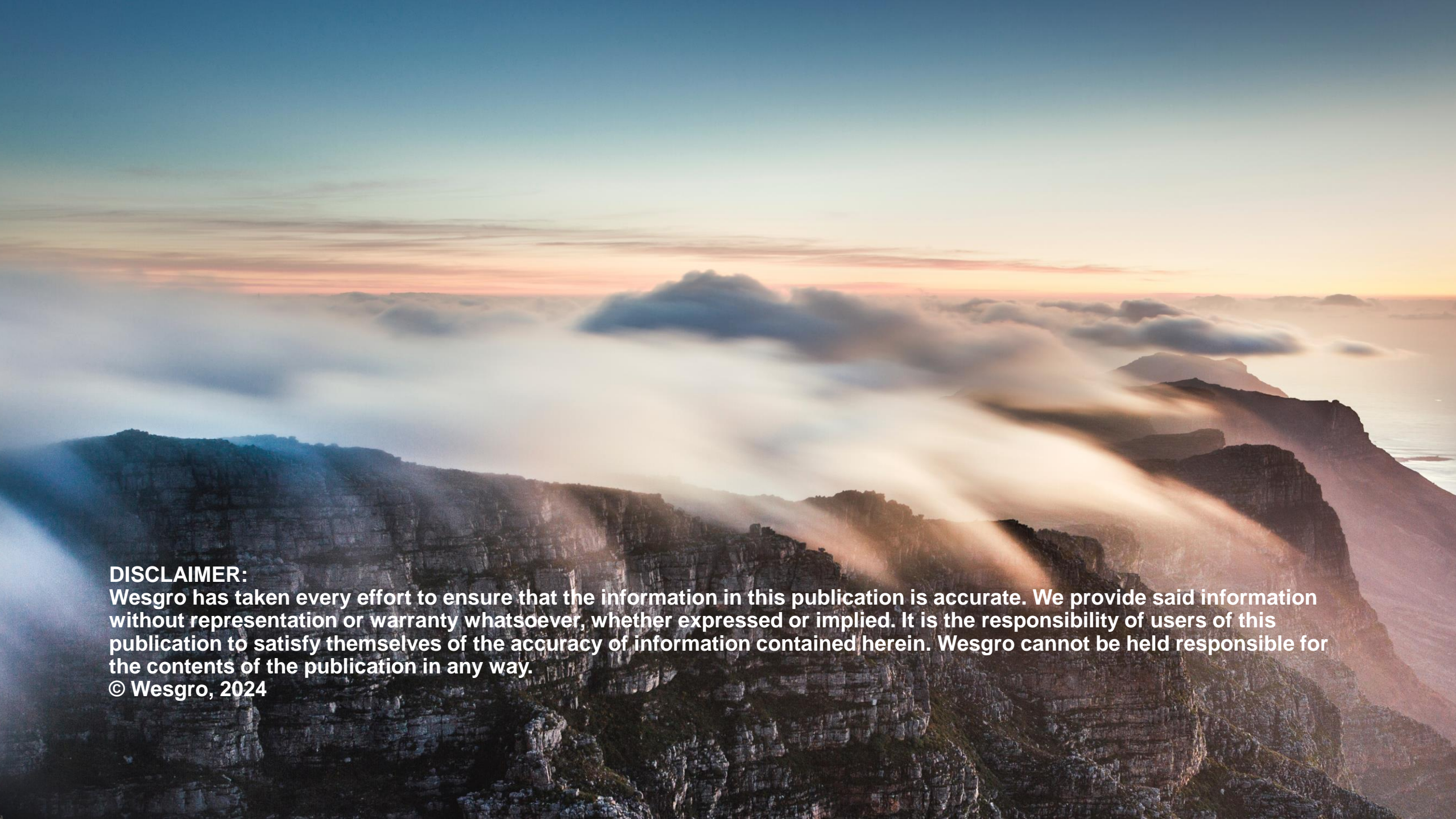
Primary Study Geography		Tourists are defined as:
Province/Tourism Regions	When a visitor does not live or work in Cape Town, Winelands, Cape Overberg, Weskus, Garden Route & Klein Karoo and Cape Karoo and they have travelled more than 25 miles (40km), and they have stayed in the polygon for more than 120 minutes, they are a tourist.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of the Western Cape are not counted as a tourists 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 Minimum duration of visit of 120 minutes excludes commuters driving through each region 		
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.	
Notes and Considerations: <ul style="list-style-type: none"> Residents of a city are not counted as tourists to the city 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 		
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.). 		
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 the 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 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.

5. List of Sources

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



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