



Garden Route & Klein Karoo

Visitor Trends

January – December 2024

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1. About this Report

This report is primarily based on tourism destination insights from ROVE: this is a mobile location data insight dashboard, designed to uncover actionable insights about tourist visitation patterns, tourist origin markets, location affinity, times and duration of visits, and tourist demographics.

The report details insights from the dashboard regarding the Garden Route and Klein Karoo region for the period January to December 2024. The mobile location data was used to analyse the travel behaviour of tourists visiting the region.



Image source: Wesgro (2025)

2. Key Insights

Rove mobile location data from January to December 2024 was used to gain insights into the travel behaviour of domestic and international tourists who visited the Garden Route & Klein Karoo region. The following findings were observed:

Domestic tourists:

- Mobile location data offered valuable insights into the travel patterns of 205,395 domestic tourists who visited the region between January and December 2024. The majority of these visitors were from key municipalities, including Cape Town, Nelson Mandela Bay, Tshwane, Johannesburg and Ekurhuleni, which highlights the region's appeal to urban dwellers.
- The average length of stay for domestic tourists in the Garden Route & Klein Karoo was 2.0 days. Notably, 29.20% of domestic visitors were repeat tourists, suggesting a strong level of satisfaction and loyalty to the destination. A closer look at the data revealed that 34.10% of the visitors chose to stay for only a single day. The duration of stay fluctuated between 1.8 and 2.2 days, indicating a relatively even distribution of overnight visits in 2024.
- In addition, 60.70% of domestic tourists opted to stay overnight in the region. An analysis of arrival and departure trends indicated that Friday was the most popular day for tourists to arrive, while Sunday was the favoured day for their departure. This pattern underscores both the weekend getaway nature of many visits and the significance of Friday as a key travel day for those seeking an escape to the Garden Route & Klein Karoo.

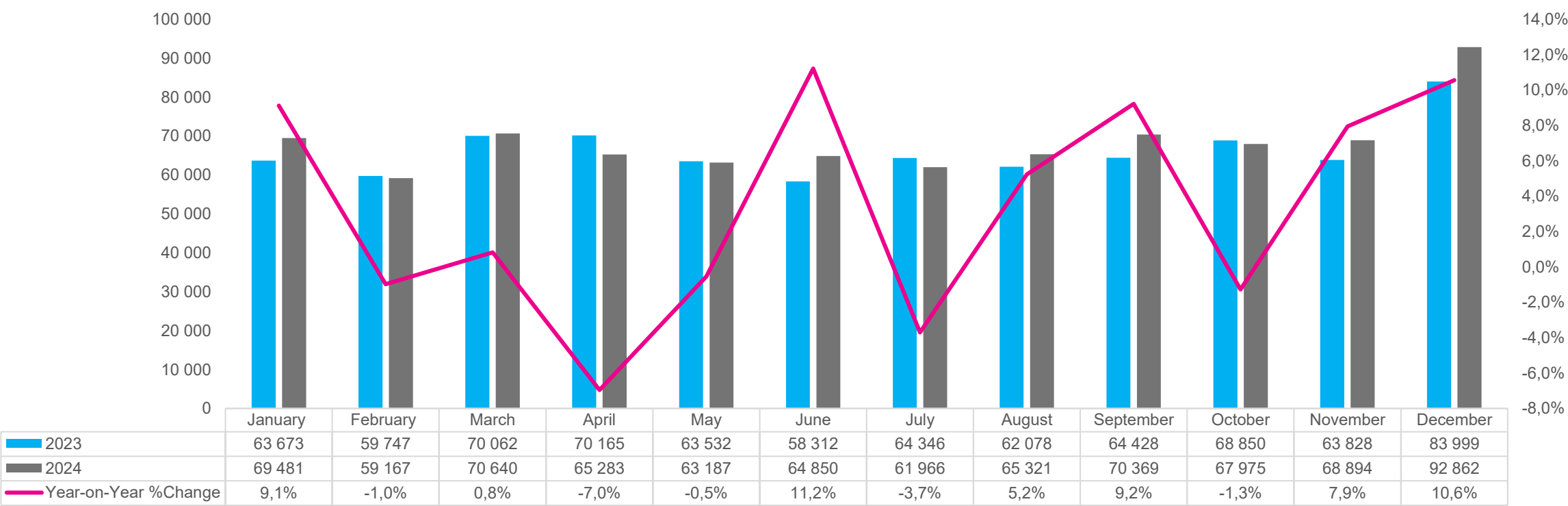
International tourists:

- Mobile location data provided valuable insights into the travel patterns of 1,919 international tourists who explored the diverse landscapes and attractions of the Garden Route & Klein Karoo. The international visitors came from countries such as the United States, Brazil, Australia, the United Arab Emirates, Mexico, Canada, India, New Zealand, Namibia and Saudi Arabia, which highlights the region's appeal to a broad range of international travellers.
- Just like domestic visitors, international tourists spent approximately 2.0 days in the Garden Route, with 28.00% indicating they had visited the region in the past. This shows a level of repeated interest and satisfaction with their experiences.
- The average length of stay for the year ranged from 1.6 days to 2.1 days. Furthermore, 58.00% of international tourists chose to stay overnight, with December and April recording peak overnight stays: 64.50% of visitors stayed overnight in December, and 62.00% in April. These peaks may have correlated with specific events or favourable weather conditions during those months.
- An analysis of arrival and departure patterns revealed that Saturday was the favoured day of arrival while Monday was the most popular day for departures.

3. George Airport Passenger Movement

- In 2024, George airport recorded a total of 819,995 arrivals and departures, reflecting a 3.4% year-on-year increase compared to 2023. The growing popularity of the region as a tourist destination has contributed significantly to this positive trend, as illustrated in Figure 1. The busiest months for travel were March with 70,640 arrivals and September with 70,369 passenger arrivals.
- According to the Airports Company South Africa (2025), “The airport does not only play a central role in the region’s tourism economy; it also serves as a national distribution hub for cargo such as flowers, fish, oysters, herbs, and ferns.”

Figure 1: Two-way Passenger Movement through George Airport, January–December 2024



4. Mobile Location Data Insights for Garden Route & Klein Karoo: Methodology

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 international and domestic sample counts:

The volume of mobile location data 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 the 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 phones through wi-fi services. Tourists may not use the partnership apps they usually use while on extensive holidays. Restricting data privacy laws are also affecting the international landscape, which has an impact on the data that can be shared. This, in turn, may affect processing that identifies tourists.

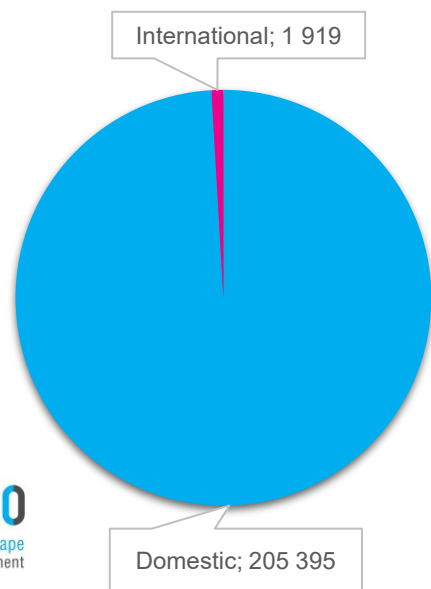


5. Visitor Trends & Patterns in the Garden Route & Klein Karoo: Mobile Location Data Insights

5. Garden Route & Klein Karoo Mobile Location Data Insights: Domestic Sample Size

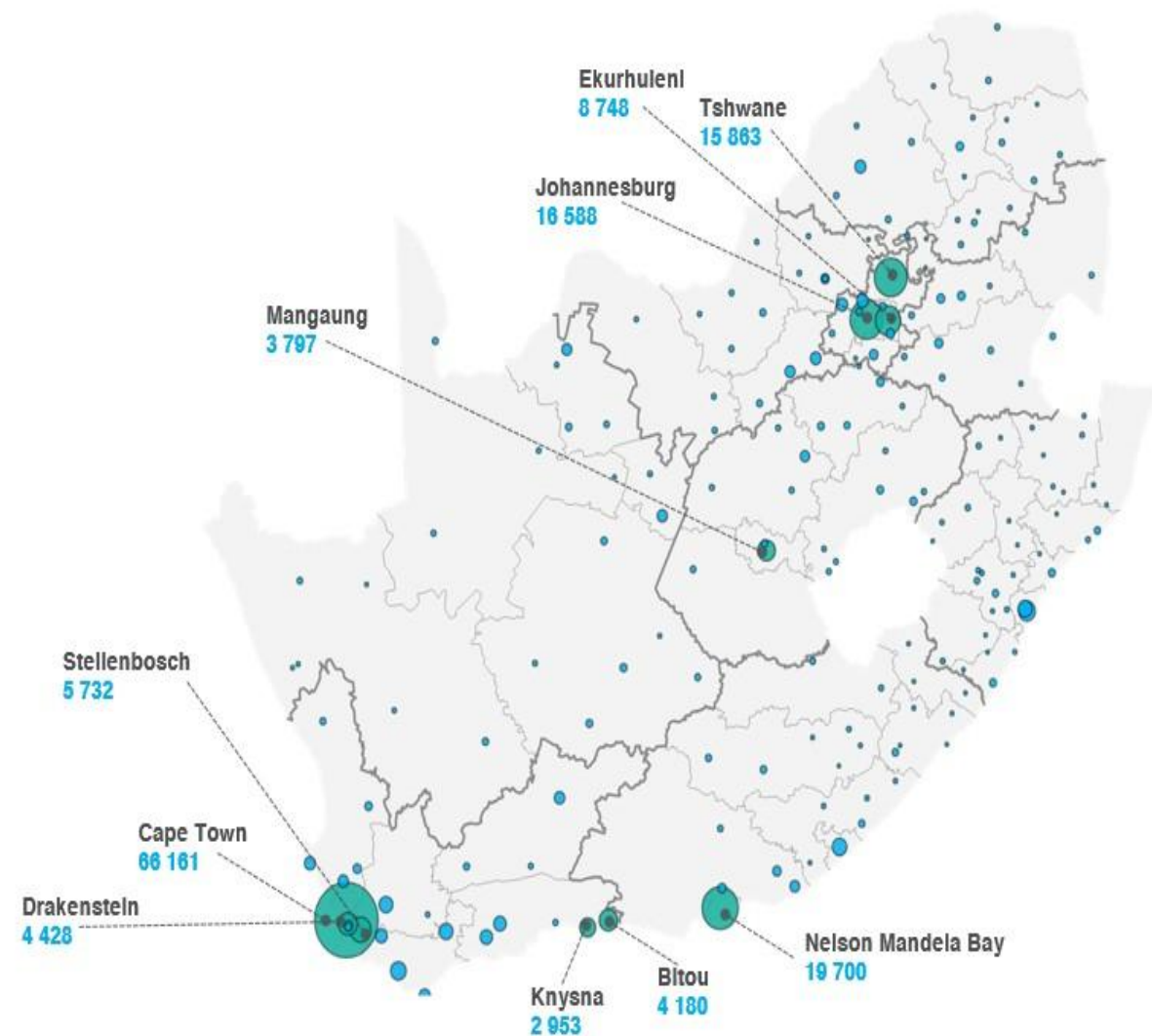
- The insights in this report represent mobile location data from a sample of 205,395 domestic tourists and 1,919 international tourists who visited the Garden Route & Klein Karoo between January and December 2024. This is illustrated in Figure 2.
- Figure 3 shows that a significant portion of domestic visitors to the Garden Route & Klein Karoo originated from the urban centres of South Africa. Cape Town was the leading source market with 66,181 visitors, followed by Nelson Mandela Bay (19,700), Johannesburg (16,588), Tshwane (15,863), and Ekurhuleni (8,748). These figures highlight the Garden Route & Klein Karoo’s appeal to a diverse national audience.

Figure 2: Garden Route & Klein Karoo sample size, January–December 2024



Source: Rove (2025)

Figure 2: Origin of domestic visitors, January–June 2025



Source: Rove (2025)

5. Garden Route & Klein Karoo Mobile Location Data Insights: International Sample Size

- The top ten source countries for international visitors to the region are presented in Figure 4. From a sample size of 1,919 international visitors, the United States accounted for 24.7% of these visitors; Brazil for 18.4%; Mexico for 3.8%, and Canada 3.0%. These four countries collectively contributed to 49.9% of arrivals in the Garden Route and Klein Karoo. International visitors from the Middle East, came from the United Arab Emirates (5.0%) and Saudi Arabia (1.4%).
- India accounted for 2.4% of international visitors, which meant that the country ranked 7th among the top ten source countries. Additional markets such as New Zealand (1.6%) and Namibia (1.5%) also featured in the top ten, reflecting both regional connections in Southern Africa and ongoing interest from other long-haul markets in the Garden Route & Klein Karoo.

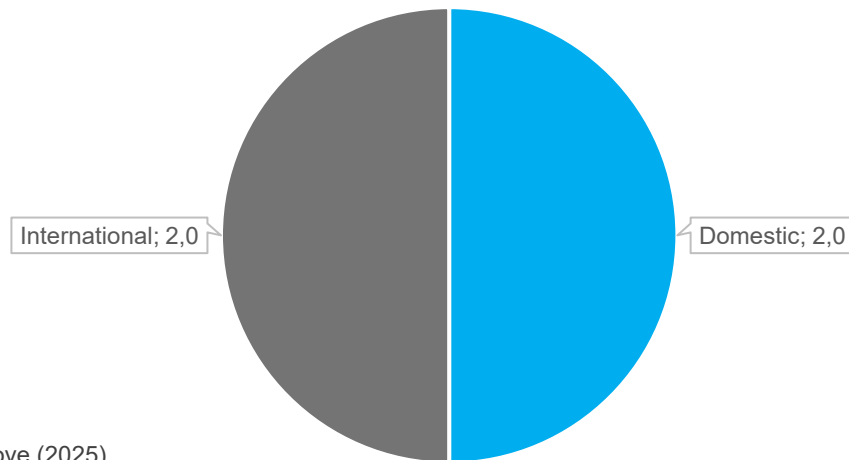
Figure 4: Countries of origin for international tourists visiting the Garden Route & Klein Karoo, January-December 2024



5. Average Length of Stay and Repeat Visitors in the Garden Route & Klein Karoo

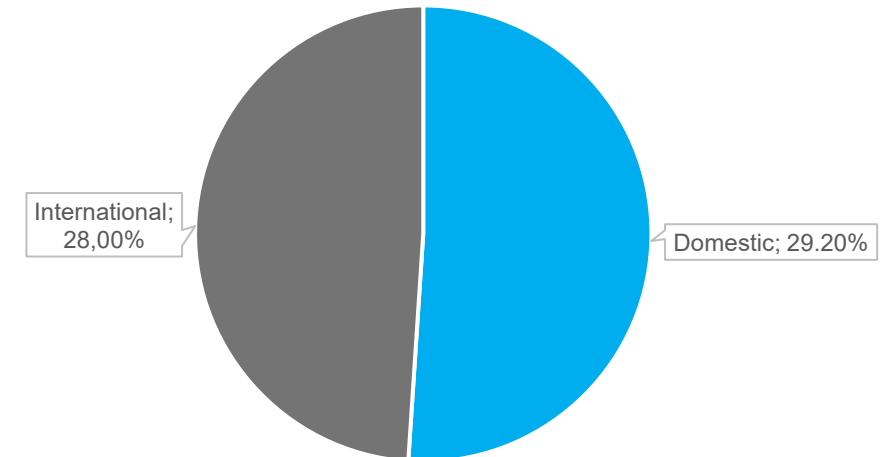
- Figure 5 shows the average length of stay for visitors to the Garden Route & Klein Karoo. Both domestic and international tourists spent an average of 2.0 days in the region. This information is based on data analysed between January and December 2024.
- The data further showed that 29.20% of domestic tourists and 28.00% of international tourists were repeat visitors to the region, as illustrated in Figure 6. This indicates that the region is a popular destination among tourists, who often choose to return for subsequent visits.
- Findings also indicated that 34.10% of domestic tourists and 35.30% of international tourists visited the region for just one day (Figure 7). Overall, visitors stayed an average of three days in the region between January and December 2024.
- Figure 5 provides information on visitors' average length of stay in the region by month. Throughout the year, the average length of stay by month varied slightly but remained consistently between 1.6 and 2.2 days for both domestic and international visitors.

Figure 5: Average length of stay, days (LOS), January–December 2024



Source: Rove (2025)

Figure 6: Repeat visits to the Garden Route, January–December 2024



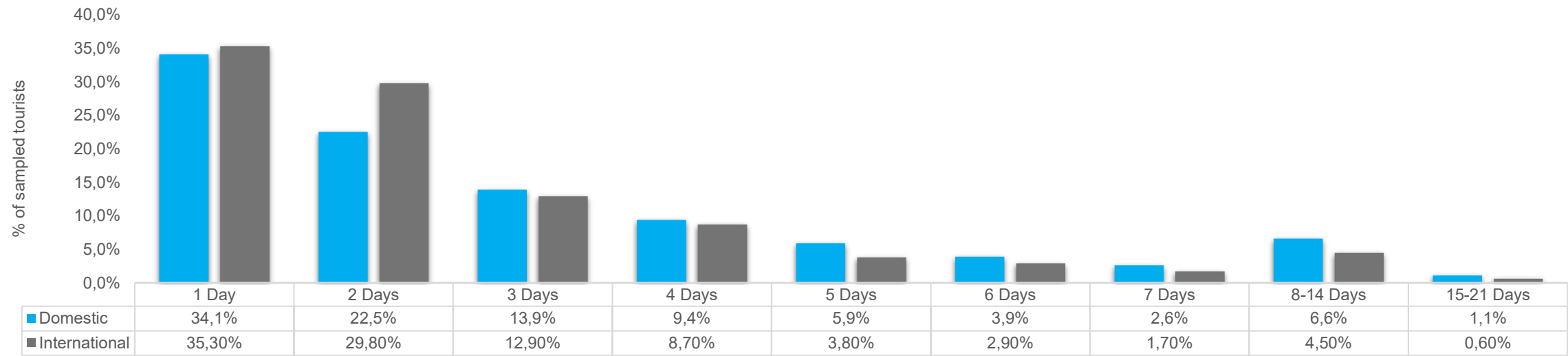
Source: Rove (2025)

Note: 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.

**Please refer to the factors influencing the International and Domestic sample counts on page 6.*

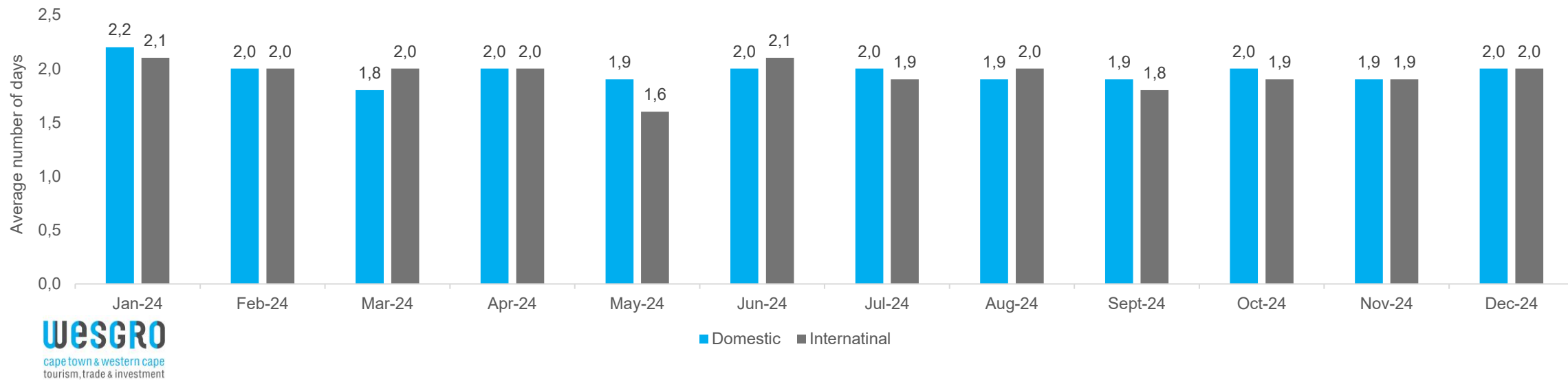
5. Average Length of Stay in the Garden Route & Klein Karoo

Figure 7: Average length of stay (number of days) in the Garden Route & Klein Karoo, January–December 2024



Source: Rove (2025)

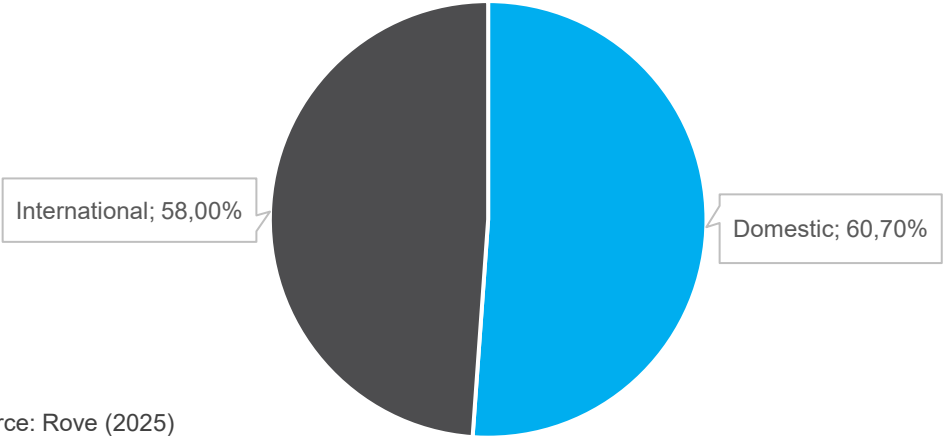
Figure 8: Average length of stay in the region by month, January–December 2024



Source: Rove (2025)

5. Overnight Stays: Trends in the Garden Route & Klein Karoo

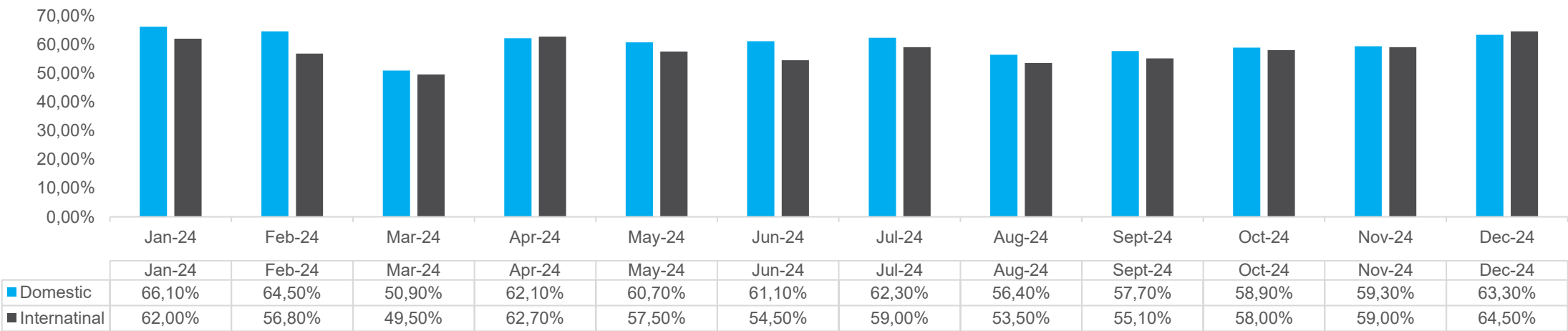
Figure 9: Overnight stays in the Garden Route & Klein Karoo, January–December 2024



Source: Rove (2025)

- Approximately 58.00% of sampled international tourists and 60.70% of domestic tourists preferred to stay overnight in the Garden Route & Klein Karoo. This can be observed in Figure 9.
- December and January emerged as the peak months for overnight stays by international visitors in the region, while peak overnight stays were seen in January and February for the domestic market. This is illustrated in Figure 10.

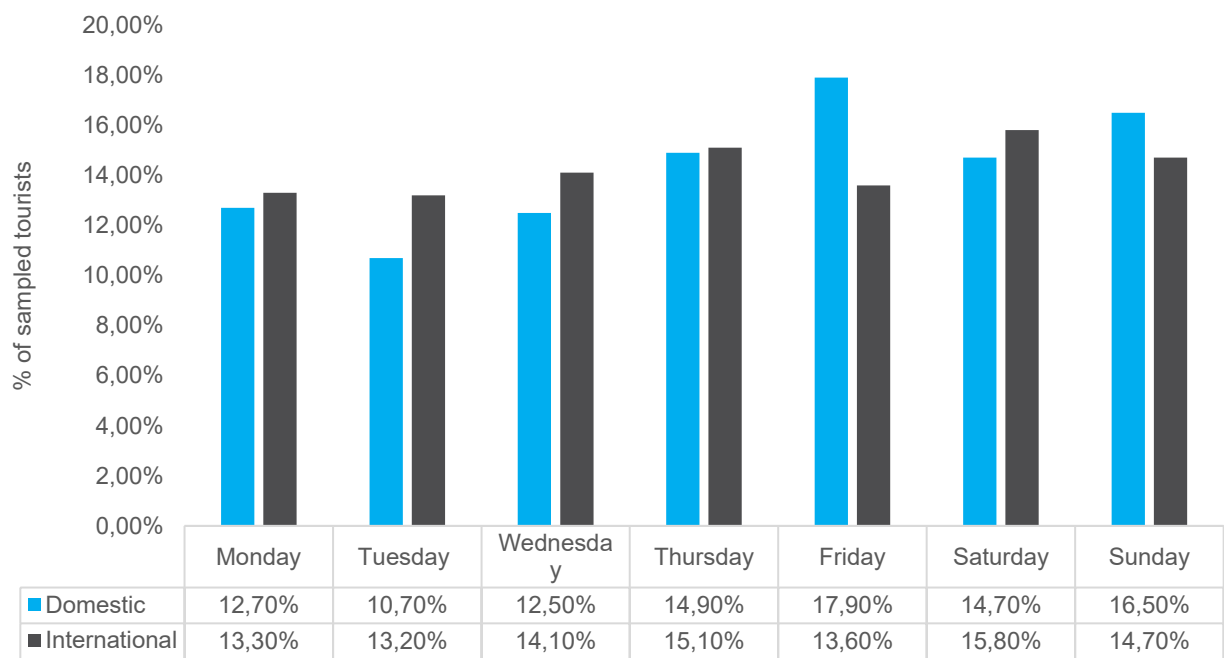
Figure 10: Overnight stays in the Garden Route & Klein Karoo by month, January–December 2024



5. Popular Arrival and Departure Days

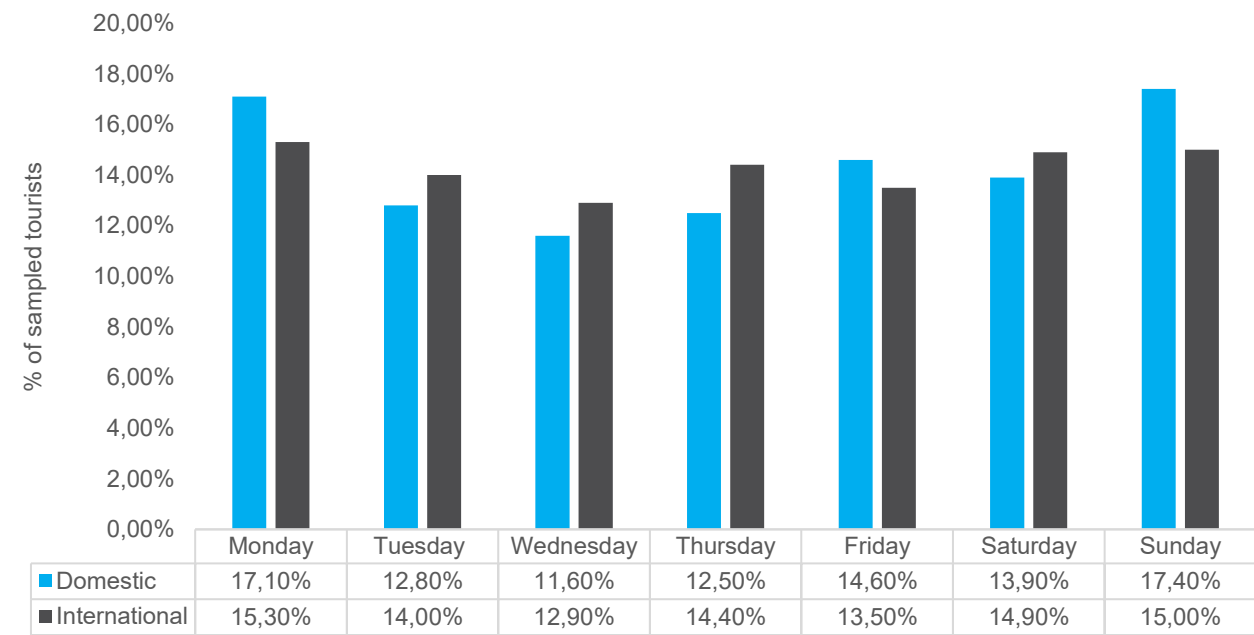
- Figures 11 and 12 indicate that domestic visitors opted to begin their stay on a Friday, possibly to take advantage of the weekend that followed. On the other hand, Sunday was identified as the most popular day for departures from the region.
- Interestingly, when looking at the behaviour of international tourists, a different pattern emerges: Saturday was highlighted as the favoured day for arrivals and Monday for departures.

Figure 11: Popular arrival days of the week in the Garden Route & Klein Karoo, January–December 2024



Source: Rove (2025)

Figure 12: Popular departure days of the week from the Garden Route & Klein Karoo, January–December 2024



Source: Rove (2025)

A scenic view of the Cape Peninsula coastline. In the foreground, the blue ocean stretches across the frame. In the middle ground, a series of mountains are visible, with the most prominent one on the left having a sharp, rocky peak. The sky is a pale, clear blue. The overall atmosphere is bright and serene.

6. Performance of Garden Route & Klein Karoo Attractions January–December 2024

6. Garden Route & Klein Karoo Attractions: CapeNature

- Figure 13 shows the annual visitor arrivals for the three CapeNature reserves found in the Garden Route & Klein Karoo, namely Robberg, Keurbooms River and Goukamma nature reserves.
- Robberg nature reserve had the highest share of visitors with 147,176 visitor arrivals between January and December 2024, representing a 50.43% growth in visitors when compared to the same period in 2023.
- All these reserves reflected a positive increase in growth throughout the period under review. This can be seen in Figure 14.

Figure 13: Annual visitor arrivals in CapeNature reserves in the Garden Route & Klein Karoo, January–December 2024

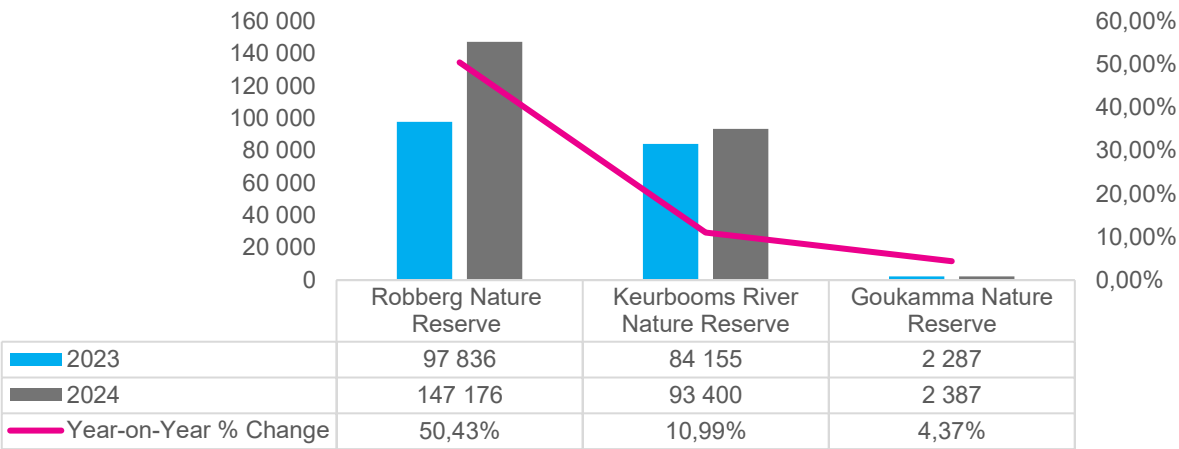
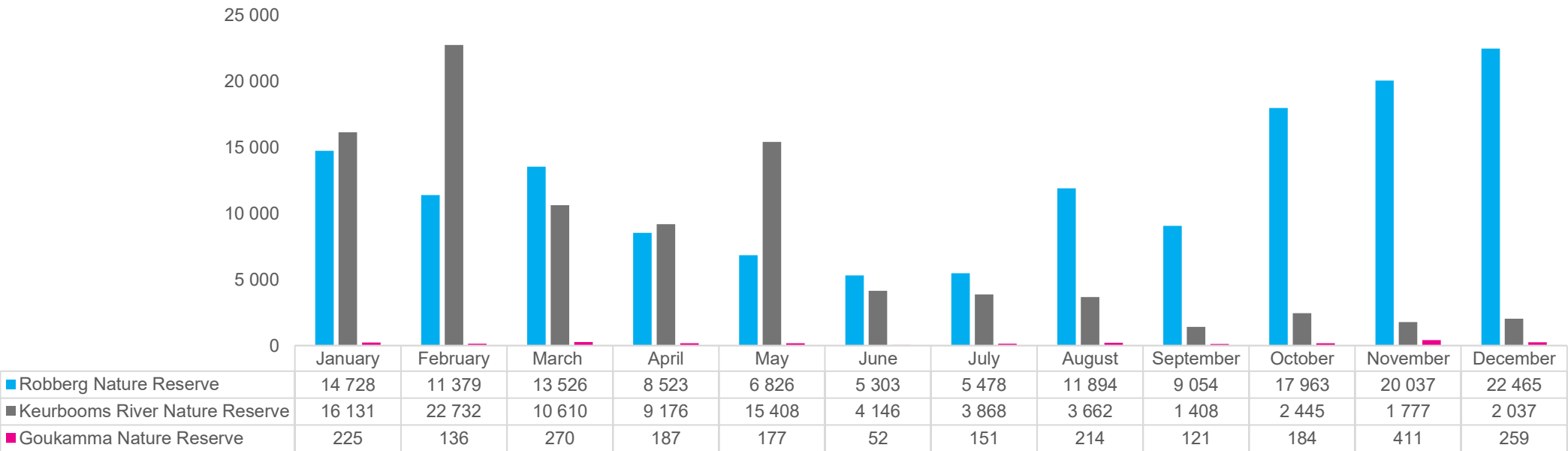


Figure 14: Monthly visitor arrivals in CapeNature reserves in the Garden Route & Klein Karoo, January–December 2024

Source: CapeNature (2025)

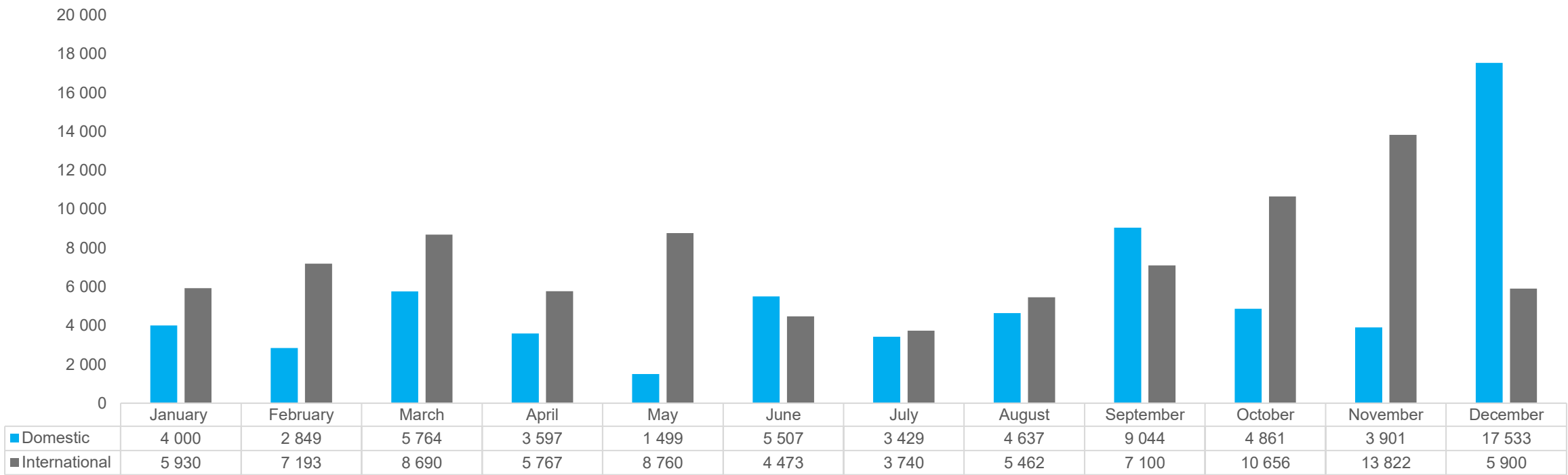


Source: CapeNature (2025)

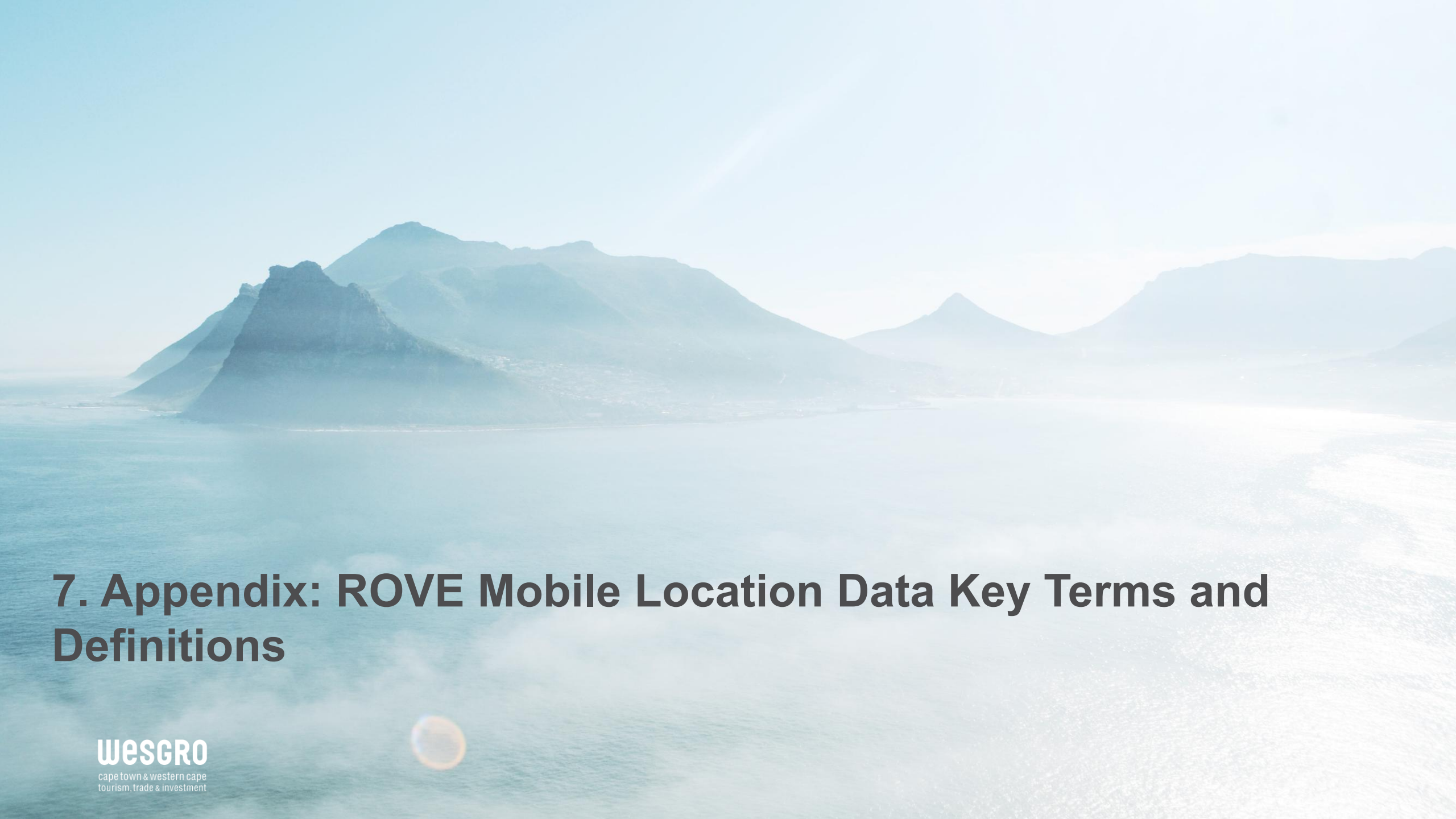
6. Garden Route & Klein Karoo Attractions: Cango Caves

- The Cango Caves welcomed a total of 154,114 visitors between January and December 2024. Of these, 66,621 were domestic visitors and 87,493 were international visitors.
- According to Figure 15, September 2024 recorded the highest monthly growth in visitors to the Caves, seeing an increase of 59.90% when compared to the previous month, marking a significant peak during the year. December attracted the largest share of domestic arrivals (17,533), while international arrivals peaked in November (13,822).

Figure 15: Monthly visitor arrivals to the Cango Caves, January–December 2024



Source: Cango Caves (2025)

A scenic view of a coastline with mountains and the ocean. The mountains are in the background, and the ocean is in the foreground. The sky is blue and clear.

7. Appendix: ROVE Mobile Location Data Key Terms and Definitions

7. 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 visitor who appears in the study geography for a minimum period of time (exclude commuters/passers through, etc.)

7. 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: - 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: - 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: - 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?	
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	

7. 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.

8. Acknowledgements

Acknowledgements and many thanks go to the following for supplying the primary data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

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