Cape Garden Route & Klein Karoo Visitor Trends

WESGRO
cape town & western cape
research

January-June 2017

Contents

1. Methodology

This report provides an overview of the tourism trends and patterns in the Cape Garden Route & Klein Karoo. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.

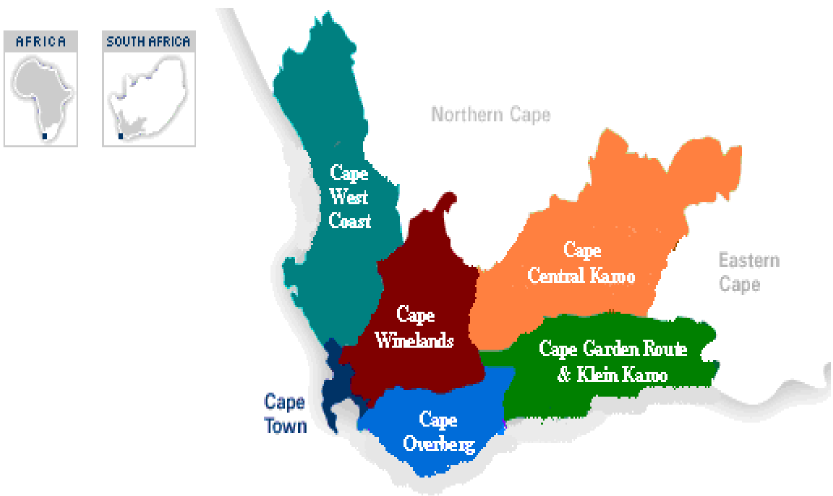
Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.

Definition: *Tourist: refers to any visitor travelling to a place other than that of his/her own environment for more than one night, but less than 12 months and for whom the main purpose of the trip is other than the exercise of an activity remunerated for from within the place visited.*

2. Participation and sample size

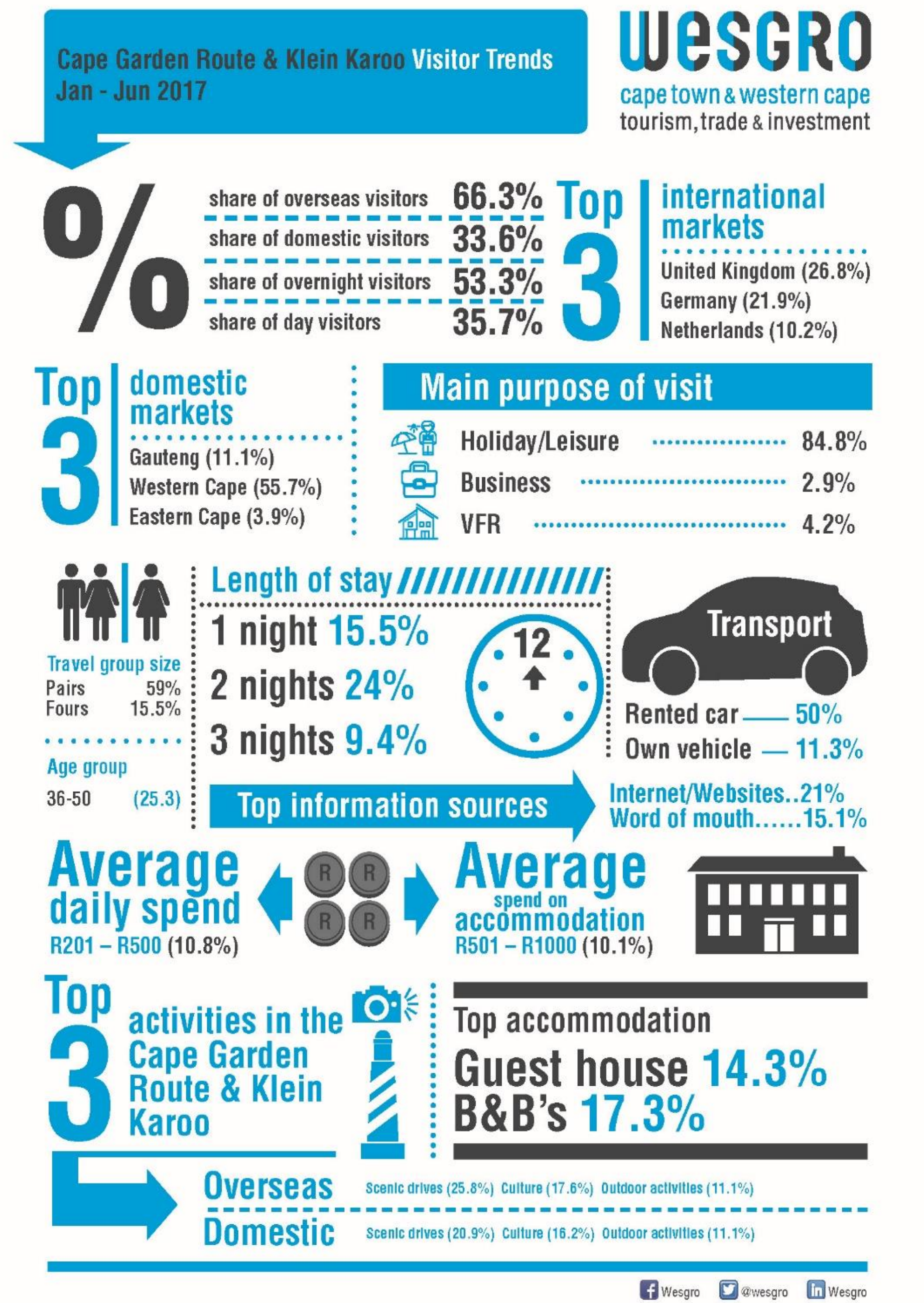
Between January and June 2017, a total of **1155** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Garden Route & Klein Karoo. The participating Tourism Offices were:

Knysna	178
George	209
Oudtshoorn	366
Mossel Bay	50
Plettenberg Bay	60
Calitzdorp	119
Ladismith	80
Wilderness	93



3. Executive Summary

- Cape Garden Route & Klein Karoo received even spilt of overseas and domestic visitors based on the surveys received by the tourism offices of the region.
- Cape Garden Route & Klein Karoo received 53,3% of overnight visitors making positive contribution to the accommodation sector.
- The region received slightly lower percentage share of day visitors with 35,7%, which could be your visitors coming to the region for events.
- Visitors to the region enjoyed travelling in pairs (59,0%), which could be your couples on holiday.
- Visitors to the region also enjoyed travelling in fours (15,5%), which could be your groups of friends or family or four.
- The age group of visitors primarily travelling to the Cape Garden Route & Klein Karoo was 36-50 (25,3%).
- The top international markets to the region were United Kingdom (26,8%), Germany (21,9%) and Netherlands (10,2%).
- Both the overseas and domestic market enjoyed scenic drives and outdoor activities.
- Over 80% of visitors came for holiday showcasing the region as favorable holiday destination.
- The region received R201-R500 (10,8%) daily spend and R501-R1000 (10,1%) daily spend on accommodation.
- Visitors to the Cape Garden Route & Klein Karoo enjoyed staying at guesthouses and B&Bs preferably.
- Rented car was most favourable mode of transport to the Cape Garden Route & Klein Karoo.
- Internet/websites and word of mouth was most common source of information used.

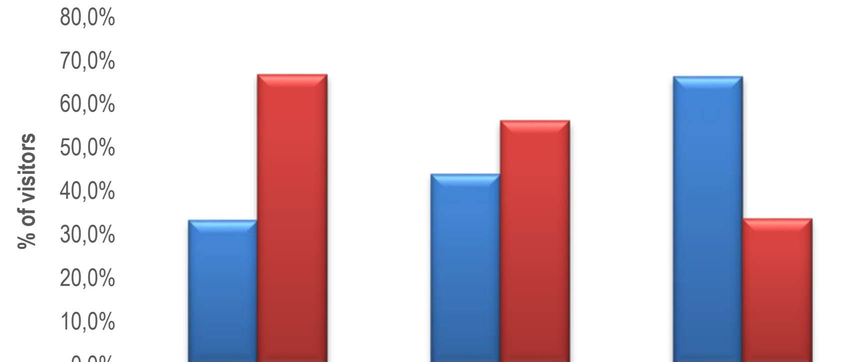


4. Cape Garden Route & Klein Karoo Trends & Patterns

4.1. Origin of visitors

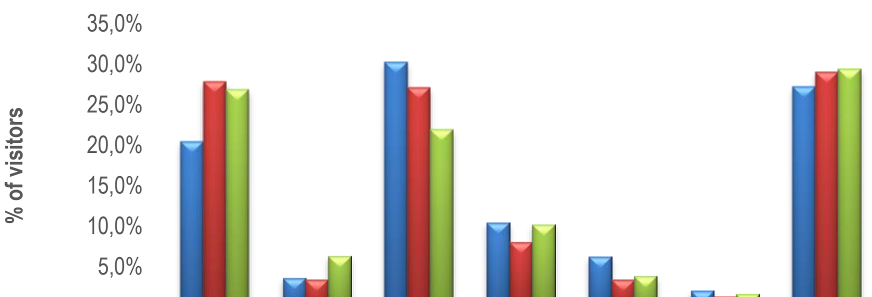
- Based on the surveys received by tourism offices of the Cape Garden Route & Klein Karoo there has been more overseas visitors during January and June 2017, when compared to the previous years.
- Traditional markets such as the United Kingdom and Germany ranked as the region's top two international markets from January to June 2015-2017.
- The European travellers continue to drive tourism activity in Cape Garden Route & Klein Karoo. The other includes smaller sample size of international markets to the region.
- From 2015-2017 the Western Cape market consistently led domestic travel into the Cape Garden Route & Klein Karoo, followed by Gauteng and the Eastern Cape. The other includes smaller sample size of domestic provinces to the region.

% SHARE OF OVERSEAS & DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2015-2017



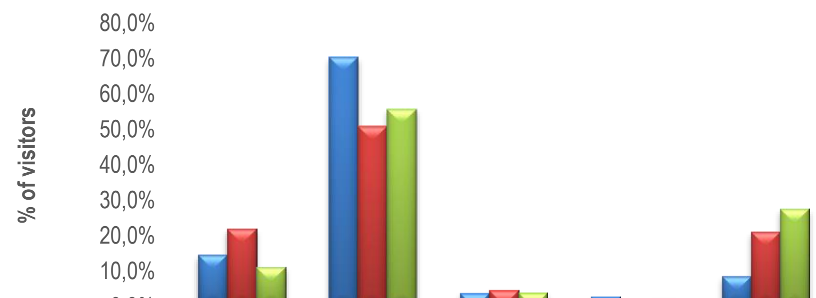
	Jan-Jun 2015	Jan-Jun 2016	Jan-Jun 2017
overseas	33,2%	43,9%	66,3%
domestic	66,8%	56,1%	33,6%

TOP OVERSEAS VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2015-2017



	United Kingdom	France	Germany	Netherla nds	United States	Italy	Other
Jan-Jun 2015	20,4%	3,6%	30,2%	10,4%	6,2%	2,0%	27,2%
Jan-Jun 2016	27,8%	3,4%	27,1%	8,0%	3,4%	1,3%	29,0%
Jan-Jun 2017	26,8%	6,3%	21,9%	10,2%	3,8%	1,6%	29,4%

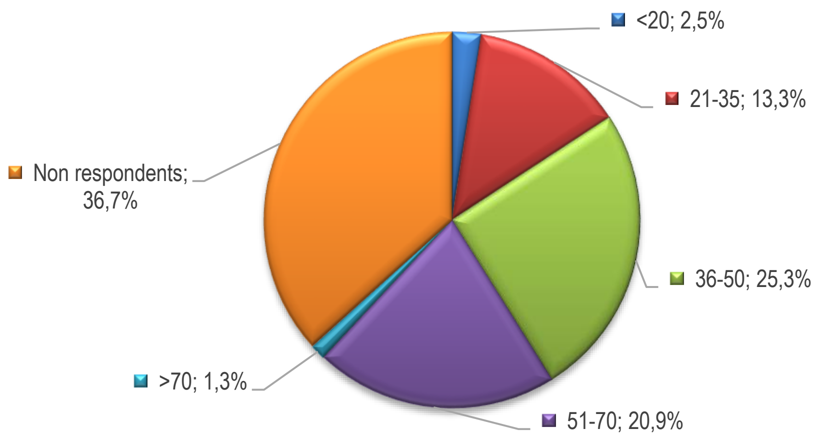
TOP DOMESTIC MARKETS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2015-2017



	Gauteng	Western Cape	Eastern Cape	Kwa-Zulu Natal	Other
Jan-Jun 2015	14,6%	70,4%	3,8%	2,7%	8,5%
Jan-Jun 2016	21,9%	50,8%	4,6%	1,7%	21,0%
Jan-Jun 2017	11,1%	55,7%	3,9%	1,8%	27,5%

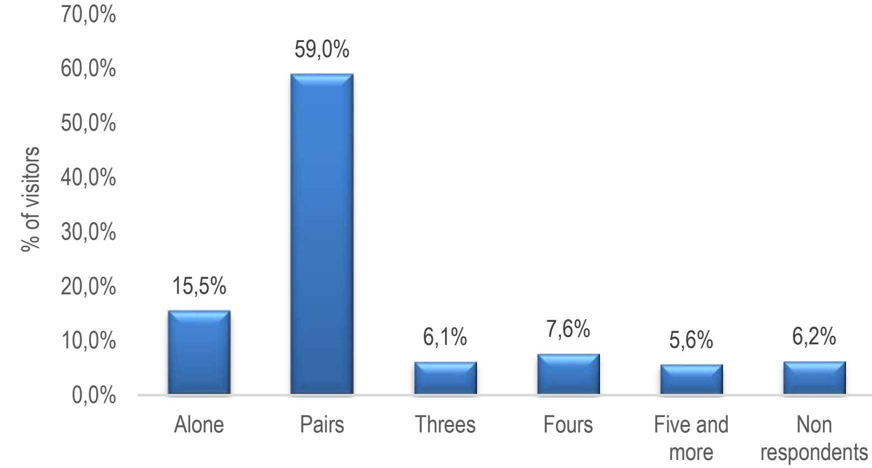
4.2 Age group

AGE GROUP OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2017



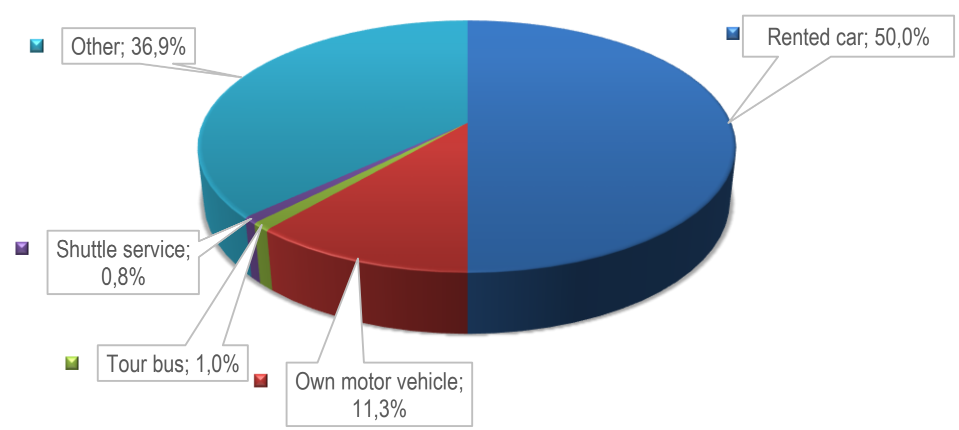
4.3 Group size

TRAVEL GROUP SIZE OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO,JAN-JUN 2017



4.4 Mode of transport

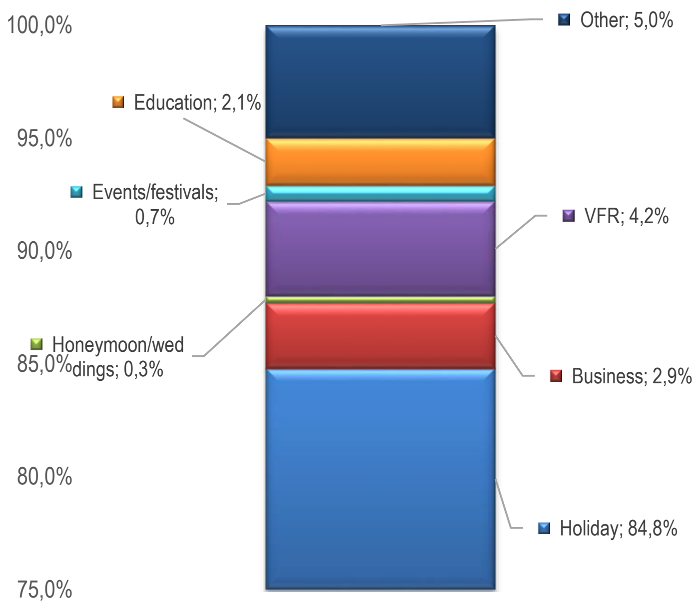
MAIN MODE OF TRANSPORT USED BY VISITORS TO THE CAP GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2017



- The age group (36-50 years) 25,3%% was the more popular age group amongst all visitors to the region.
- The travel group size revealed that visitors to the region enjoyed travelling in pairs (59,0%), which could be your couples or friends.
- Travelling alone (15,5%) to the region was also popular amongst visitors, which could be your business tourists.
- Based on the surveys received from the tourism offices the majority stated that own motor vehicle (11,3%) and rented car (50,0%) was the most favourable mode of transport used by visitors to the Cape Garden Route & Klein Karoo.

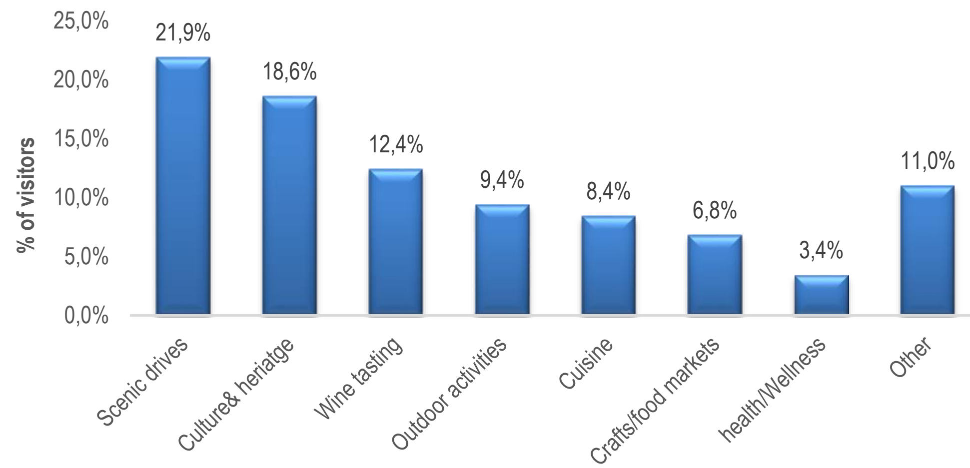
4.5 Purpose of visit

MAIN PURPOSE OF VISIT BY VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2017



4.6 Main activities

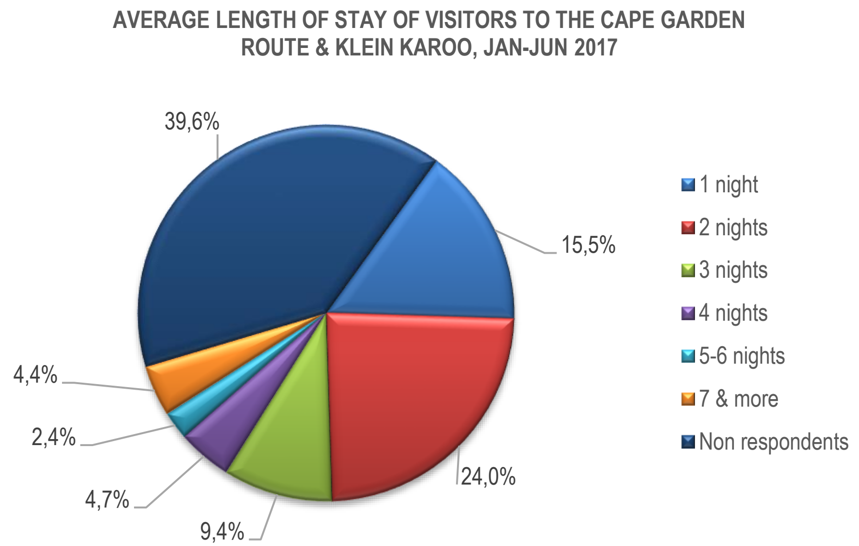
MAIN ACTIVITIES UNDERTAKEN BY VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2017



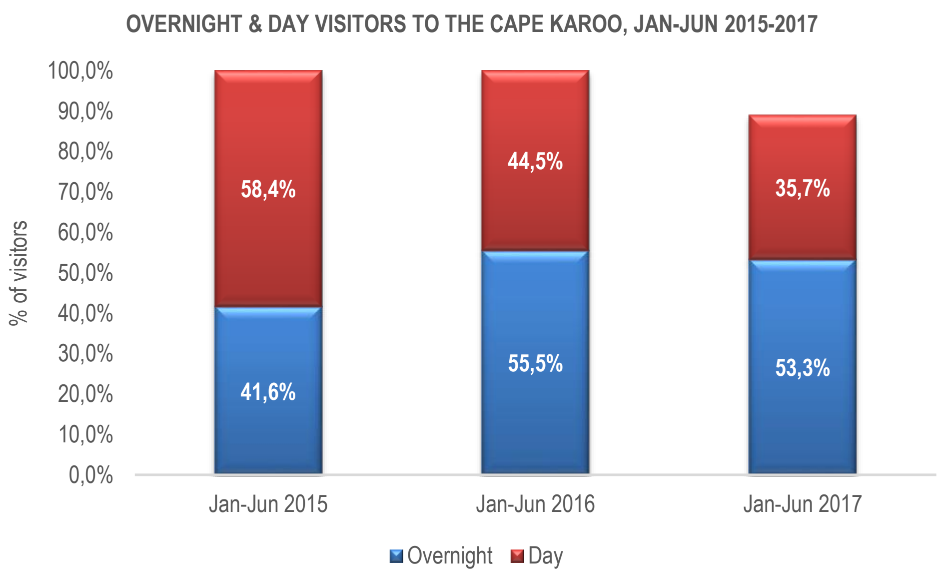
- The trends revealed that holiday/leisure ranked as the main motivation for travel to the Cape Garden Route & Klein Karoo with percentage share of 84,8%.
- Visitors to the region also came for business 2,9% and visiting friends and family 4,2%
- The top activity undertaken by visitors to the Cape Garden Route & Klein Karoo was scenic drives.
- Visitors to the region also enjoyed cultural experiences (18,6%) and wine tasting (12,4%).

4.7 Length of stay

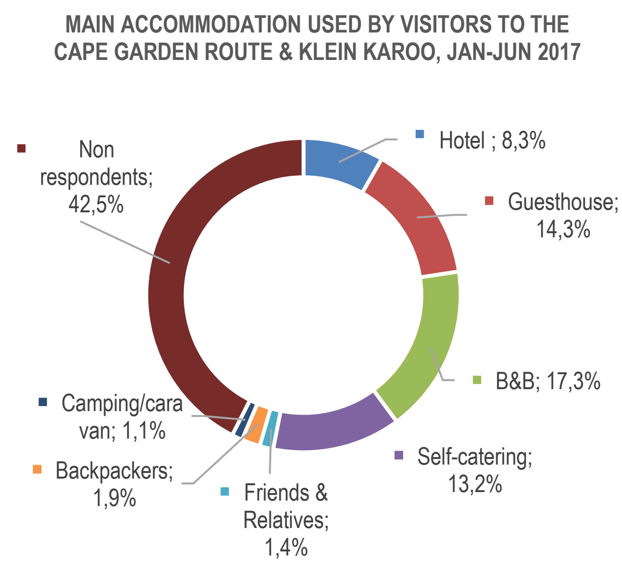
- The majority of the visitors to the Cape Garden Route & Klein Karoo stayed for one night to two nights.
- The trends revealed a strong share of day visitors 35,7% and overnight visitors 53,3% amongst all visitors to the Cape Garden Route & Klein Karoo. 11,3% did not respond to the question.
- The region had positive overnight stay of 53,3%, which contributes positively to the accommodation establishments within the Cape Garden Route & Klein Karoo.
- B&B (17,3%) and guesthouses (14,3%) ranked amongst the most popular accommodation categories used by visitors to the Cape Garden Route & Klein Karoo.



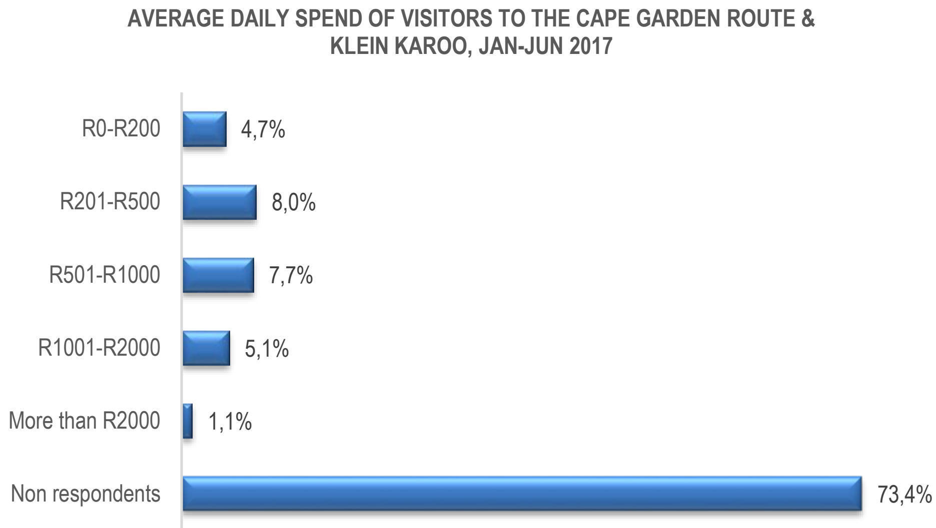
4.8 Overnight stay



4.9 Accommodation used by visitors



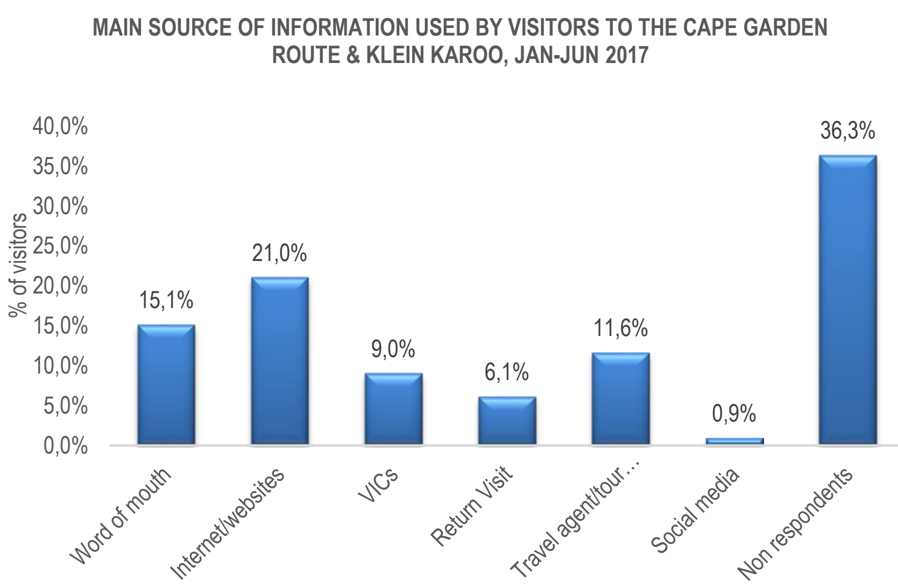
4.10 Average daily spend



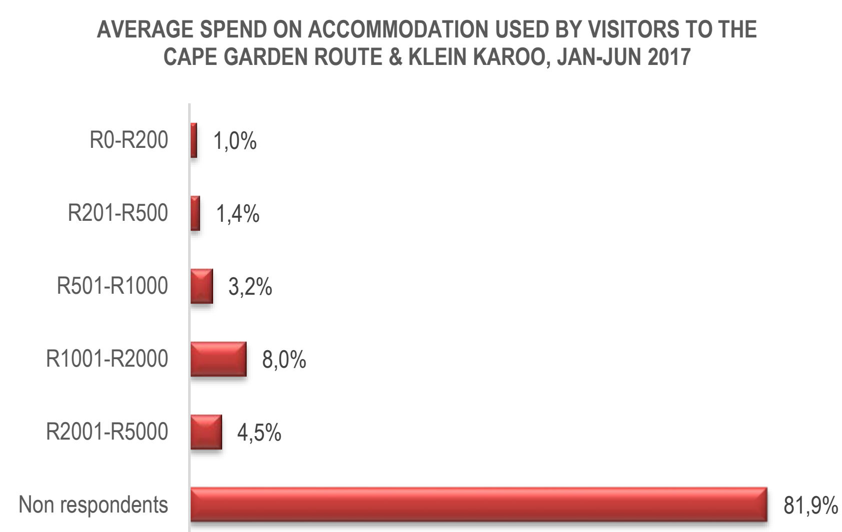
- Of the recorded statistics the highest average daily spend between January and July 2017 for the Cape Garden Route & Klein Karoo was R201-R500 (8,0%).
- Internet/websites (21,0%) and word of mouth (15,8%) were the most popular source of information used.
- Of the recorded statistics visitors to the Cape Garden Route & Klein Karoo the highest expenditure range on accommodation was R1001-R2000 (8,0%).

.

4.11 Information sources used



4.12 Average spend on accommodation



5. Profile/Snapshot of overseas and domestic market

OVERVIEW OF OVERSEAS & DOMESTIC VISITOR TRENDS AND PATTERNS, JAN-JUN 2017		
TOURISM INDICATOR	**OVERSEAS**	**DOMESTIC**
Age group	21-35 (30.5%)	21-35 (35.9%)
	36-50 (27.4%)	36-50(25.8%)
	51-70 (7.6%)	51-70 (6.1%)
Main purpose of visit	Holiday/leisure (95.7%)	Holiday/leisure (85.5%)
	Business (1.5%)	Business (9.0%)
	Events (1.1%)	Education (4.1%)
Most common travel group size	Pairs (55.8%)	Alone (52.1%)
	Alone (19.1%)	Pairs (34.8%)
Most common length of stay	2 nights (32.9%)	1 night (50.8%)
	3 nights (21.5%)	2 nights (14.9%)
Most common mode of transport	Rented car (51.0%)	Rented car (17.6%)
	Own Motor Vehicle (26.9%)	Own Motor Vehicle (81.5%)
Top information sources	Word of mouth (53.5%)	Word of mouth (53.5%)
	Internet/websites (14.5%)	Internet/websites (14.5%)
Average daily spend	R501-R1000 (40.9%)	R501-R1000 (40.9%)
Type of accommodation	Hotel (26.7%)	Self-catering (42.6%)
	Self-Catering (21.2)	B&B (43.6%)
Average spend on accommodation	R501-R1000 (39.0%)	R501-R1000 (29.0%)
Top three activities undertaken	Scenic drives (19.6%)	Scenic drives (25.0%)
	Gourmet restaurants (11.7%)	Outdoor Activities (12.0%)
	Outdoor Activities (17.5%)	Gourmet restaurants (9.1%)

6. Profile/Snapshot of top international markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL MARKET, JAN-JUNE 2017				
TOURISM INDICATOR	**United Kingdom**	**Germany**	**Netherlands**	**United States**
Main purpose of visit	Holiday/leisure (100.0%)	Holiday/leisure (98.9%)	Holiday/leisure (100.0%)	Holiday/leisure (100.0%)
Most common travel group size	Pairs (57.7%) Alone (18.2%)	Pairs (59.5%) Threes (15.2%)	Pairs (55.7%) Alone (19.2%)	Pairs (56.7%) Alone (19.2%)
Most common age group	21-35 years (25.6%)	57-70 years (37.5%)	21-35 years (35.6%)	21-35 years (35.6%)
Most common length of stay	2 nights (35.4%) 3 nights (22.7%)	1 night (25.9%) 2 nights (27.8%)	2 nights (36.4%) 3 nights (22.7)	2 nights (36.4%) 1& 3 nights (22.7%)
Most common mode of transport	Rented car (97.7%)	Rented car (76.9%)	Rented car (97.7%)	Rented car (97.7%)
Top information sources	Internet/websites (51.4%)	Word of mouth (28.6%) Internet/websites (42.9%)	Internet/websites (51.4%) -	Internet/websites (51.4%) -
Most common type of accommodation	B&B (38.7%)	-	B&B (38.7%)	B&B (38.7%)
Top three activities undertaken	Culture & Heritage (11.8%) Outdoor activities (16.7%) Scenic Drives (21.6%)	Culture & Heritage (17.5%) Scenic drives (16.7%) Outdoor activities (15.8%)	Culture & Heritage (11.8%) Outdoor activities (16.7%) Scenic Drives (21.6%)	Culture & Heritage (11.8%) Outdoor activities (16.7%) Scenic Drives (21.6%)

7. Profile/Snapshot of top domestic markets

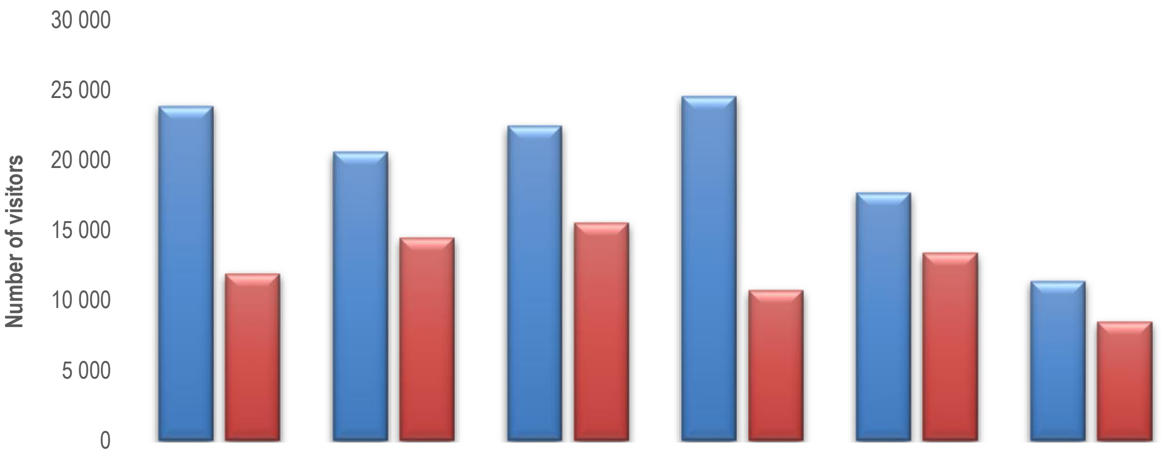
OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC MARKET, JAN-JUNE 2017				
TOURISM INDICATOR	**Western Cape**	**Gauteng**	**Eastern Cape**	**Kwa-Zulu Natal**
Main purpose of visit	Holiday/leisure (87.6%) Business (6.0%) Education (4.1%)	Holiday/leisure (88.0%) Business (7.0%)	Holiday/leisure (92.7%)	Holiday/leisure (92.7%)
Most common travel group size	Alone (54.6%) Pairs (29.9%)	Pairs (52.1%) Alone (22.3%)	Alone (15.4%) Pairs (61.5%)	Alone (15.4%) Pairs (61.5%)
Most common age group	36-50 years (58.5%)	36-50 years (42.9%)	-	-
Most common length of stay	1 night (38.7%) 2 nights (24.5%)	1 night (25.0%) 7 nights & More (23.4%)	-	-
Most common mode of transport	Own motor vehicle (89.3%) Rented car (7.7%)	Rented car (54.2%) -	Rented car (52.0%) Own motor vehicle (40.0%)	Rented car (52.0%) Own motor vehicle (40.0%)
Top information sources	Internet/websites (14.1%) Word of mouth (57.6%)	Word of mouth (57.1%)	-	-
Most common type of accommodation	Self-catering (50.8%) B&B (20.2%)	Self-catering (57.5%)	Self-catering (68.8%)	Self-catering (68.8%)
Top three activities undertaken	Culture & Heritage (11.0%) Scenic drives (28.0%) Outdoor activities (11.3%)	Crafts/food markets (11.5%) Scenic drives (23.9%) Outdoor activities (12.4%)	Scenic drives & Outdoor activities (18.2% each) -	Scenic drives & Outdoor activities (18.2% each) -

8. Cape Garden Route & Klein Karoo Towns

OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, JAN-JUNE 2017					
TOURISM INDICATOR	Knysna	George	Calitzdorp	Oudsthoorn	Plettenberg Bay
% Share overseas	42.5%	11.3%	90.4%	44.9%	10,1%
% Share domestic	57,5%	88.9%	-	45,1%	88.9%
Top international markets	United Kingdom (25.6%) Germany (14.1%) Netherlands (10.5%)	Germany (31.3%) United Kingdom (16.3%) -	Germany (31.7%) - -	United Kingdom (15.6%) Germany (14.1%) Netherlands (12.5%)	Germany (31.2%) United Kingdom (16.5%) -
Top domestic markets	Gauteng (18.4%) Western Cape (39.5%) -	Western Cape (77.8%) Gauteng (6.9%) Eastern Cape (1.6%)	Western Cape (68.2%) Gauteng (10.6%) Eastern Cape (11.1%)	Gauteng (28.4%) Western Cape (49.5%) -	Western Cape (77.8%) Gauteng (6.5%) Eastern Cape (1.5%)
Main purpose of visit	Holiday/leisure (69.3%) Honeymoon/weddings (11.5%) -	Holiday/leisure (75.9%) Business (9.6%) Education (3.9%)	Holiday/leisure (90.9%) -	Holiday/leisure (79.3%) Honeymoon/weddings (11.5%) -	Holiday/leisure (85.9%) Business (10.5%) -
Most common travel group size	Pairs (44.1%) Fours (22.7%)	Alone (43.2%) Pairs (24.0%)	Pairs (57.6%) Alone (34.9%)	Pairs (54.1%) Fours (22.7%)	Alone (53.2%) Pairs (24.0%)
Most common length of stay	2 nights (20.8%) 3 nights (21.5%)	1 night (31.6%) 7 nights & more (22.6%)	1 night (50.0%) 2 nights (34.2%)	2 nights (20.8%) 3 nights (21.5%)	1 night (41.6%) 7 nights & more (22.6%)
Most common mode of transport	Rented car (57.3%) Own Motor Vehicle (38.9%)	Rented car (35.0%) Own Motor Vehicle (45.0%)	Rented car (28.6%) Own Motor Vehicle (55.4%)	Rented car (57.3%) Own Motor Vehicle (28.9%)	Rented car (35.0%) Own Motor Vehicle (55.0%)
Top information sources	Word of mouth (41.4%) Internet/websites (42.2%)	-	Word of mouth (48.1%) Internet/websites (48.1%)	Word of mouth (41.4%) Internet/websites (42.2%)	Word of mouth (56.1%) Internet/websites (35.1%)
Average daily spend	R501-R1000 (39.2%)	-	-	R501-R1000 (38.2%)	-
Type of accommodation	Self-catering (32.2%) B&B (20.9%)	Self-catering (32.4%) -	Self-catering (52.6%) B&B (32.9%)	Self-catering (32.2%) B&B (20.9%)	Self-catering (52.4%) -
Average spend on accommodation	R501-R1000 (40.6%)	-	-	R501-R1000 (40.6%)	-
Top three activities undertaken	Crafts/food markets (43.6%) Outdoor activities (27.8%) Scenic drives (23.8%)	Culture/heritage (48.1%) Scenic drives (15.6%) Outdoor activities (23.4%)	Scenic drives (30.7%) Wine tasting (21.2%) Health/Wellness (14.0%)	Crafts/food markets (33.6%) Outdoor activities (27.8%) Scenic drives (23.8%)	Culture/heritage (58.1%) Scenic drives (25.6%) Outdoor activities (13.4%)

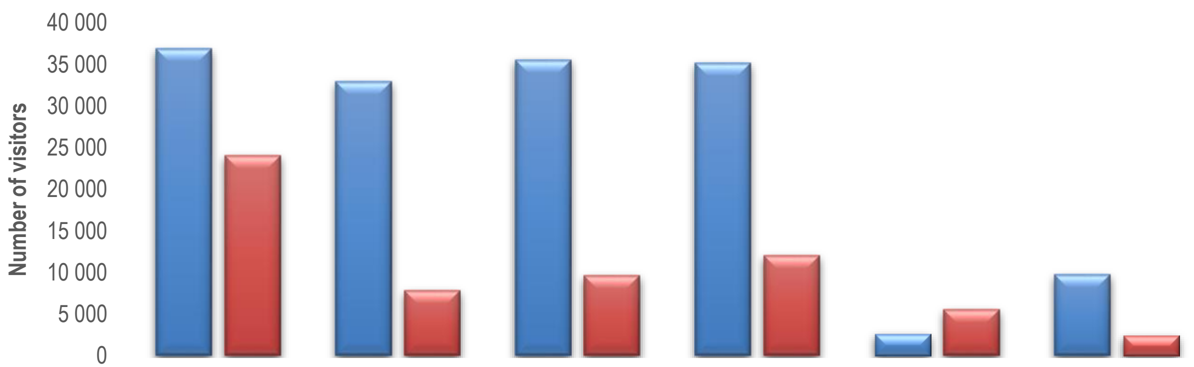
9. Cape Garden Route & Klein Karoo Attractions

TOTAL NUMBER OF VISITORS TO THE CANGO CAVES, JAN-JUN 2017



	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
Cango Caves: Total Visitors	23 861	20 575	22 451	24 550	17 665	11 362
Cango Caves: Foreign Visitors	11 883	14 457	15 532	10 698	13 354	8 438

TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO NATIONAL APRKS, JAN-JUN 2017



	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
Tsitsikamma National Park	36 867	32 926	35 538	35 156	2 634	9 769
Wilderness National Park	24 032	7 836	9 627	12 021	5 538	2 408

- Cango Caves received the highest total of visitors in April with 24 550 visitors between January and June 2017.
- Cango Caves received the highest foreign visitors in March with 15 532 visitors between January and June 2017.
- Tsitsikamma National Park received the highest total of visitors in January with 36 867 visitors between January and June 2017.
- Wilderness National Park received the highest total of visitors in January with 24 032 visitors between January and June 2017.

10.Acknowledgements

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

The participating local tourism offices in the Cape Garden Route & Klein Karoo:
- Calitzdorp Tourism
- George Tourism
- Knysna Tourism
- Ladismith Tourism
- Mossel Bay Tourism
- Oudtshoorn Tourism
- Plettenberg Bay Tourism
- Wilderness Tourism

The participating attractions in the Cape Garden Route & Klein Karoo:
- Cango Caves
- South African National Parks
- Tsitsikamma National Park
- Wilderness National Park

For more information on this publication and other Wesgro publications please contact research@wesgro.co.za. For more publications like this visit the Wesgro publications portal on our website at www.wesgro.co.za/research_articles