



Western Cape Tourism Regional Visitor Trends

January–December 2023

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1. Executive summary

- A total of 54 participating attractions across the six regions of the Western Cape recorded a total of 7,712,016 visitors between January and December 2023, which represented a 38% growth in the number of visitors when compared to January–December 2022. The top five participating Western Cape attractions with the highest volume of visitors between January and December 2023: Table Mountain National Park (2,795,838 visitors), Table Mountain Aerial Cableway (984,641), Table Mountain National Park: Cape of Good Hope (940,399), Table Mountain National Park: Boulders (762,494) and Kirstenbosch National Botanical Garden (673,290).
- The Western Cape's nature/outdoor attractions recorded the highest year-on-year growth rates between January and December 2023. The top five attractions in this regard were: Vrolijkheid Eco Venue (with a growth rate of 3820% and 1,176 visitors), Bird Island Nature Reserve (with a growth rate of 117% and 6,447 visitors), Table Mountain National Park: Boulders (with a growth rate of 60% and 762,494 visitors), Table Mountain National Park (with a growth rate of 56% and 2,795,838 visitors) and Keurbooms River Nature Reserve (with a growth rate of 54% and 84,155 visitors).
- The majority of visitors (76.6%) to the Western Cape were from the domestic market. Among these visitors, 85.2% were from the Western Cape itself, indicating that locals tend to travel mostly within their own province. A small percentage of visitors (6.6%) came from Gauteng.
- The overseas market accounted for 23.4% of visitors to the province during this period, with the survey results reflecting that the greatest number of visitors surveyed came from Germany (40.2%), followed by the United Kingdom (UK) (15.9%) and the Netherlands (7.5%).
- Gen X, Millennials, and Baby Boomers were the leading groups visiting the Western Cape. They travelled in pairs or on their own, with 79.5% of the travellers doing so for leisure/holiday purposes.
- 48.1% of visitors to the province chose to stay overnight, while 51.9% were day visitors. On average, visitors stayed for seven or more nights, with 32.5% indicating a stay of seven to ten days. Accommodation preferences leaned towards self-catering establishments and guesthouses as the most popular choices.
- Some 70% of visitors to the province expressed their preference for the use of their own vehicles while travelling. The top three activities that visitors enjoyed the most involved going on scenic drives, trying out local cuisine, and visiting cultural and heritage sites.
- Based on responses from the survey, it appears that 28.7% of the visitors who participated in the survey allocated more than R2000 towards their accommodation expenses during their stay. Meanwhile, 33.0% of visitors spent between R1,001 and R2,000 on daily expenses, and approximately 22.4% of visitors spent an average of between R501 and R1000 per day, also on daily expenses. These findings suggest that there is a significant range in the amount that visitors are willing to spend on their accommodation and daily expenses while visiting.
- Visitor information centres, word of mouth, and return visits were the top sources of information that attracted visitors to the Western Cape. Among these information sources, 31.7% of visitors listed visitor information centres as their leading source of information regarding travel to the province. This suggests that these information centres successfully promoted the Western Cape to visitors.

An aerial photograph of the Western Cape coastline, showing a range of mountains and a large body of water. The mountains are in shades of blue and green, and the water is a deep blue. The sky is a pale, hazy blue. The overall scene is serene and scenic.

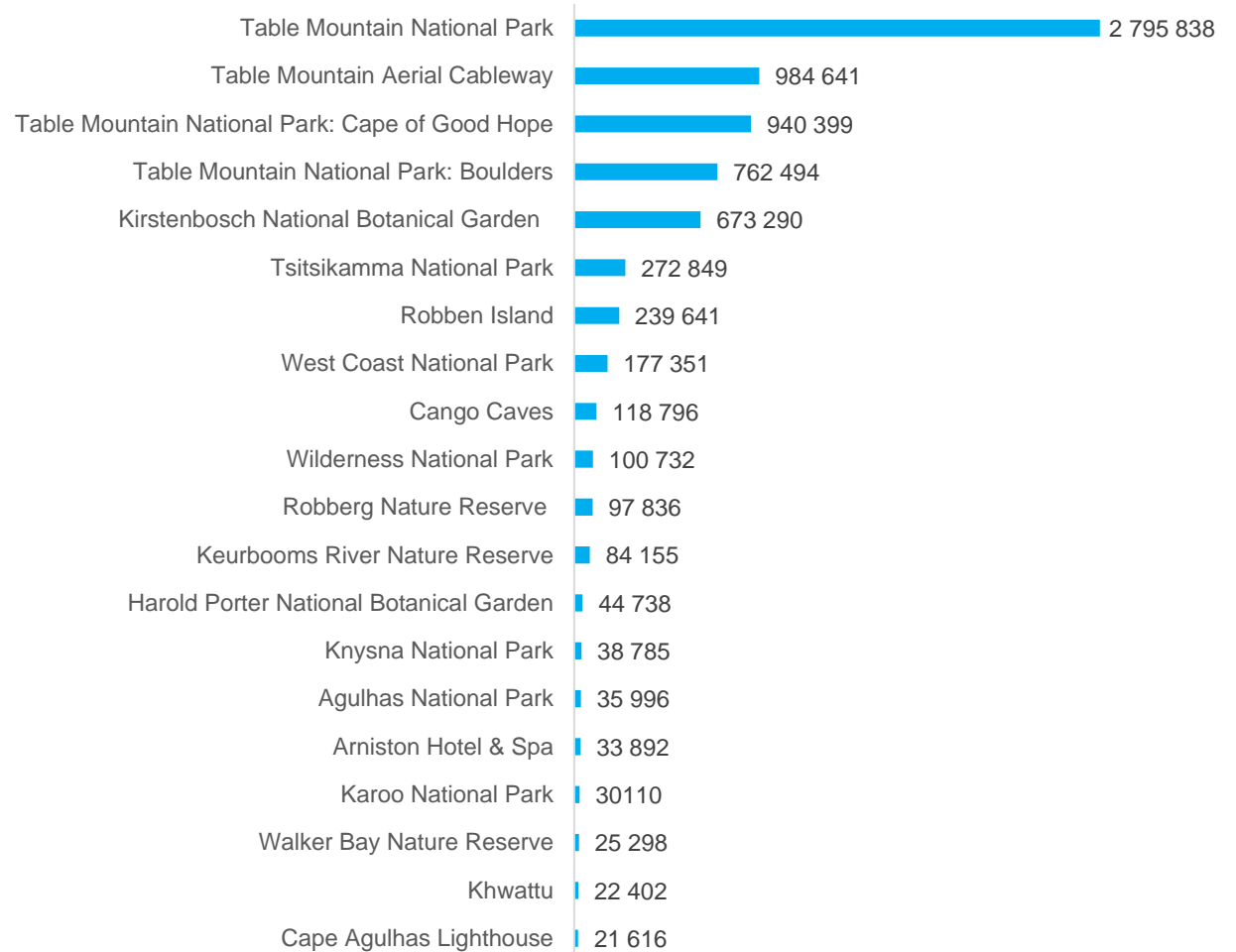
Performance of Western Cape Attractions

January–December 2023

3. Performance of Western Cape Attractions, Jan–Dec 2023

- A total of 54 participating attractions across the six regions of the Western Cape recorded a total of 7,712,016 visitors between January and December 2023 representing, a 38% growth in the number of visitors when compared to the period between January and December 2022.
- The top five participating Western Cape attractions with the highest volume of visitors between January and December 2023 were:
 1. Table Mountain National Park (2,795,838)
 2. Table Mountain Aerial Cableway (984,641)
 3. Table Mountain National Park: Cape of Good Hope (940,399)
 4. Table Mountain National Park: Boulders (762,494)
 5. Kirstenbosch National Botanical Garden (673,290)
- The highest year-on-year growth rates for the period January to December 2023 were associated with the Western Cape’s nature/outdoor attractions:
 1. Vrolijkheid Eco Venue (3820%) – (1,176 visitors)
 2. Bird Island Nature Reserve (117%) – (6,447 visitors)
 3. Table Mountain National Park: Boulders (60%) – (762,494 visitors)
 4. Table Mountain National Park (56%) – (2,795,838 visitors)
 5. Keurbooms River Nature Reserve (54%) – (84,155 visitors)

Figure 1: Top 20 Participating Western Cape Attractions, Jan–Dec 2023



Source: LTOs, CapeNature and SANParks (2024)

3. Performance of Western Cape Attractions, Jan–Dec 2023

Continued...

Table 1: Performance of Western Cape Attractions, Jan–Dec 2023

Western Cape Attractions	2022	2023	2022 / 2023 % Change
Cape Town			
Table Mountain National Park	1 788 409	2 795 838	56%
Table Mountain Aerial Cableway	682 272	984 641	44%
Table Mountain National Park: Cape of Good Hope	631 618	940 399	49%
Table Mountain National Park: Boulders	475 858	762 494	60%
Kirstenbosch National Botanical Garden	620 523	673 290	9%
Robben Island	175 962	239 641	36%
Total	4 374 642	6 396 303	46%
Overberg			
Harold Porter National Botanical Garden	45 592	44 738	-2%
Agulhas National Park	27 245	35 996	32%
Arniston Hotel & Spa	36 766	33 892	-8%
Walker Bay Nature Reserve	17 366	25 298	46%
Cape Agulhas Lighthouse	22 106	21 616	-2%
De Hoop Nature Reserve	17 121	19 805	16%
Bontebok National Park	16 375	16 205	-1%
Stony Point	57 616	11 173	-81%
Kogelberg Nature Reserve	10 178	9 245	-9%
Grootvadersbosch Nature Reserve	9 071	8 410	-7%
Marloth Nature Reserve	5 497	7 057	28%
De Mond Nature Reserve	5 371	4 162	-23%
The Whale Trail	3 936	3 482	-12%
Panthera Africa	2 653	2 908	10%
Shipwreck Museum	3 955	2 453	-38%
Grootvadersbosch Eco Venues	1 919	1 933	1%
Stony Point Eco Venue	859	951	11%
Elim Heritage Centre	1 160	856	-26%
Total	284 786	250 180	-12%
Garden Route & Klein Karoo			
Tsitsikamma National Park	213 794	272 849	28%
Cango Caves	124 541	118 796	-5%
Wilderness National Park	97 088	100 732	4%
Robberg Nature Reserve	64 711	97 836	51%
Keurbooms River Nature Reserve	54 788	84 155	54%
Knysna National Park	40 959	38 785	-5%
Goukamma Nature Reserve	2 664	2 287	-14%
Outeniqua Nature Reserve	42	3	-93%
Total	598 587	715 443	20%

Weskus	2022	2023	2022 / 2023 % Change
West Coast National Park	166 199	177 351	7%
Khwattu	18 023	22 402	24%
Cederberg-Algeria Nature Reserve	17 187	13 393	-22%
Bird Island Nature Reserve	5 407	11 745	117%
Matjiesrivier Nature Reserve	10 222	10 705	5%
Cederberg-Kliphuis Nature Reserve	3 136	3 526	12%
Groot Winterhoek Wilderness Area	3 174	3 130	-1%
Rocherpan Nature Reserve	2 299	2 443	6%
Total	225 647	244 695	8%
Cape Winelands			
Limietberg Nature Reserve	16 665	20 417	23%
Viljoensdrift River Cruise	18 212	12 801	-30%
Avalon Springs	10 135	11 634	15%
Birds Paradise	8 035	6 447	-20%
Vrolijkheid Nature Reserve	6 141	6 138	0%
Jonkershoek Nature Reserve	20 318	5 104	-75%
Protea Tractor Trip	5 974	4 118	-31%
Hottentots Holland Nature Reserve	3 677	3 030	-18%
Assegaaibosch Nature Reserve	2 870	2 003	-30%
Vrolijkheid Eco Venue	30	1 176	3820%
Total	92 057	72 868	-21%
Cape Karoo			
Karoo National Park	30 042	30 110	0%
Gamkaberg Nature Reserve	1 842	1 486	-19%
Anysberg Nature Reserve	512	727	42%
Swartberg Nature Reserve	173	204	18%
Total	32 569	32 527	0%
Total for all Attractions in 2022 & 2023	5 608 288	7 712 016	38%

NB: Total number of visitors ranked from highest to lowest by region.

Source: LTOs, CapeNature and SANParks (2024)

An aerial photograph of the Western Cape coastline, showing a range of mountains and a large body of water. The mountains are in shades of blue and green, and the water is a deep blue. The sky is a pale, hazy blue.

Western Cape visitor trends & patterns

Wesgro primary research: Regional visitor tracking surveys

2. Methodology and sample size

This report provides an overview of the tourism trends and patterns in the Overberg region. The findings will illustrate key visitor trends obtained from the regional visitor tracking surveys.

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: Visitor: Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.

Between **January and December 2023**, a total of **10,374** responses to the regional visitor tracking surveys were received from the various tourism offices in the Western Cape. The participating tourism offices were:

Table 2: Total number of responses between Jan and Dec 2023

Region	Number of Surveys
Overberg	5,895
Weskus	3,119
Winelands	1,029
Garden Route & Klein Karoo	331

Source: Wesgro Regional Visitor Tracking Survey (2023)



Source: Wesgro (2024)

4. Western Cape visitor trends & patterns

4.1 Origin of visitors

- According to the survey results, the domestic market accounted for the largest share of respondents (76.6%) who visited the region between January and December 2023, whereas 23.4% of respondents were overseas travellers. This can be seen in Figure 2.
- Figure 3 shows that 40.2% of overseas travellers to the Western Cape originated from Germany, followed by visitors from the UK (15.9%), and those from the Netherlands (7.7%) according to the survey results.
- The largest share of domestic travellers (85.2%) were from the Western Cape, as shown in Figure 4. This confirms the observation that locals enjoy the diversity of tourism offerings in their neighbouring regions.

Figure 2: % Share of overseas and domestic visitors to the Western Cape, Jan–Dec 2023

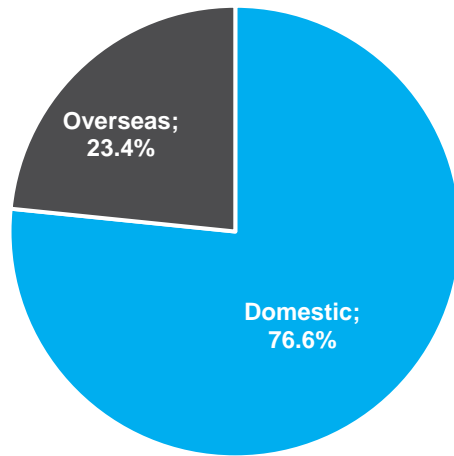


Figure 3: % Share of overseas visitors to the Western Cape, Jan–Dec 2023

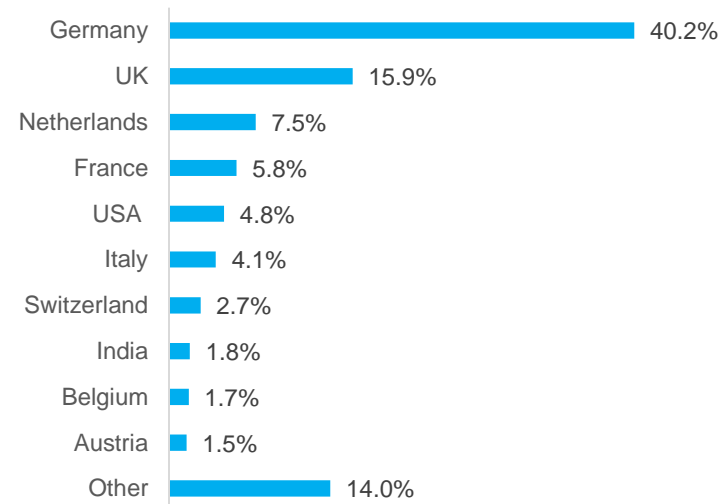
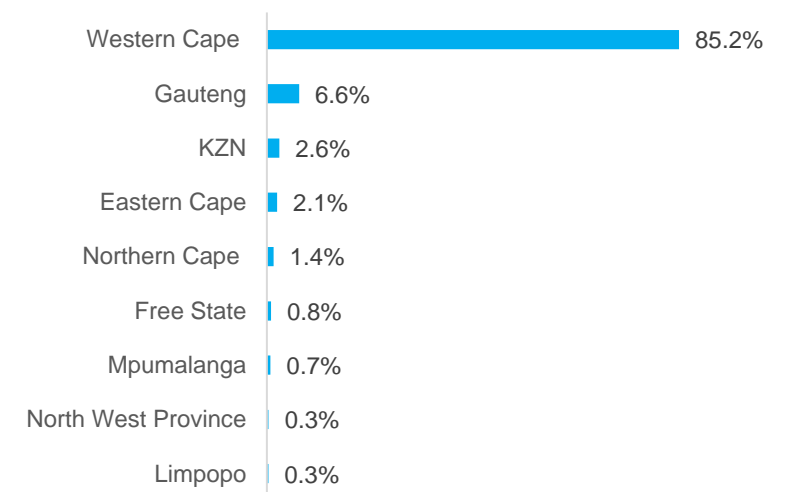
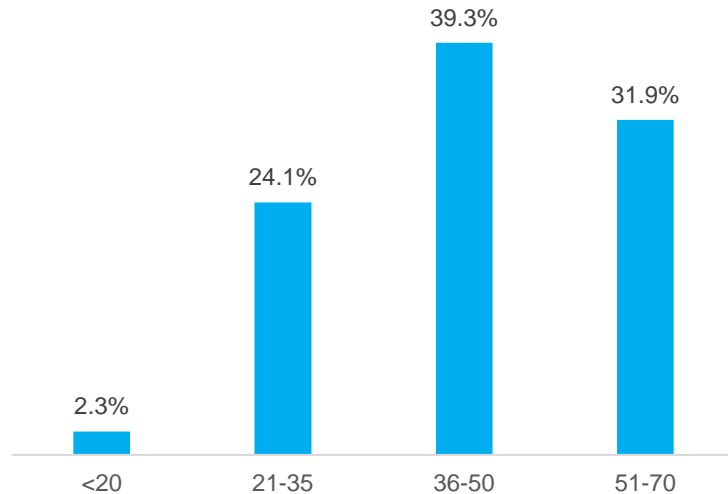


Figure 4: % Share of domestic visitors to the Western Cape, Jan–Dec 2023



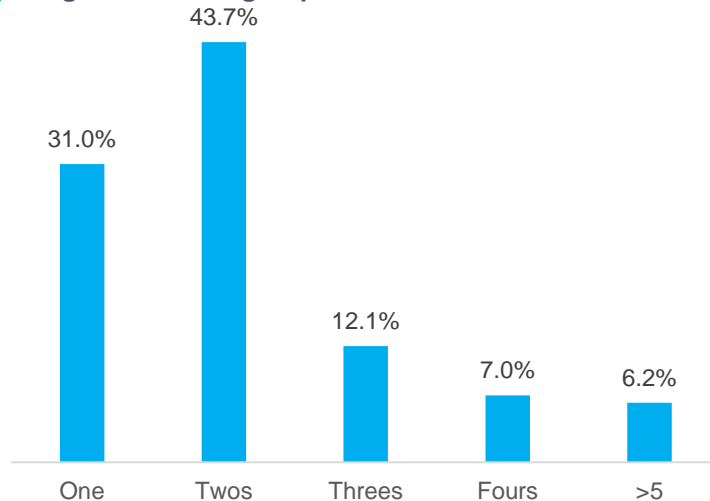
4. Western Cape visitor trends & patterns

4.2 Figure 5: Age profile of visitors

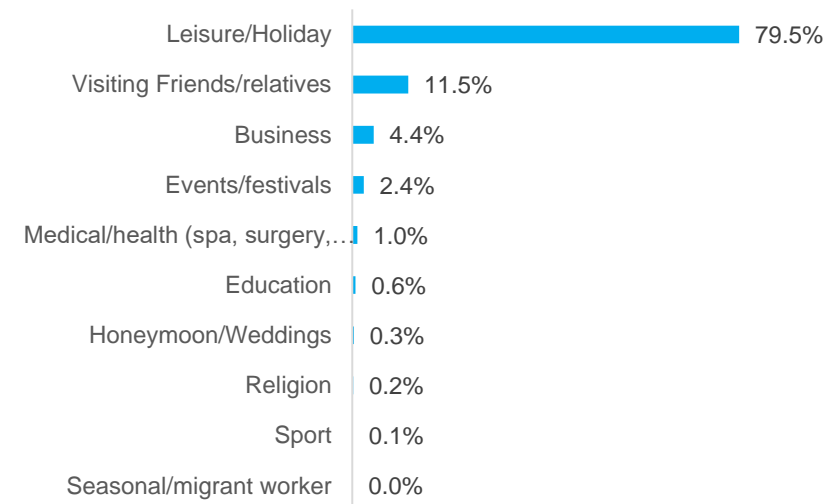


- Figure 5 illustrates that most visitors to the Western Cape were in the age groups of 36–50, 21–35 and 51–70 years.
- The largest proportion of respondents (43.7%) travelled to the region in pairs, followed by 31.0% who were solo travellers. This is shown in Figure 6.
- In Figure 7, it can be seen that most of the visitors (79.5%) travelled to the province primarily for leisure/holiday purposes and 11.5% visited friends and relatives. Some came for business (4.4%) and events/festivals (2.4%), whereas a small percentage (1.0%) visited for medical/health.

4.3 Figure 6: Travel group size

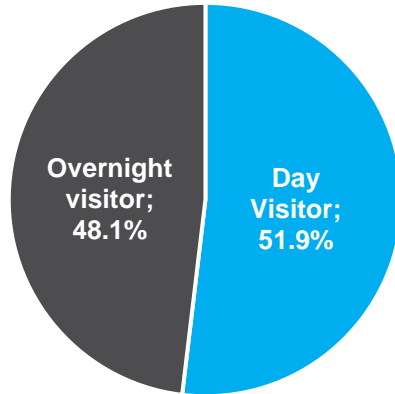


4.4 Figure 7: Purpose of visit



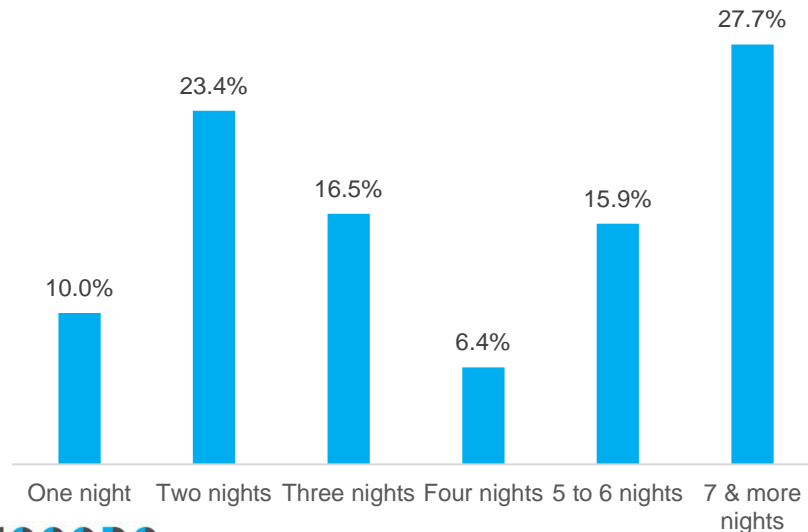
4. Western Cape visitor trends & patterns

4.5 Figure 8: Overnight and day visitors

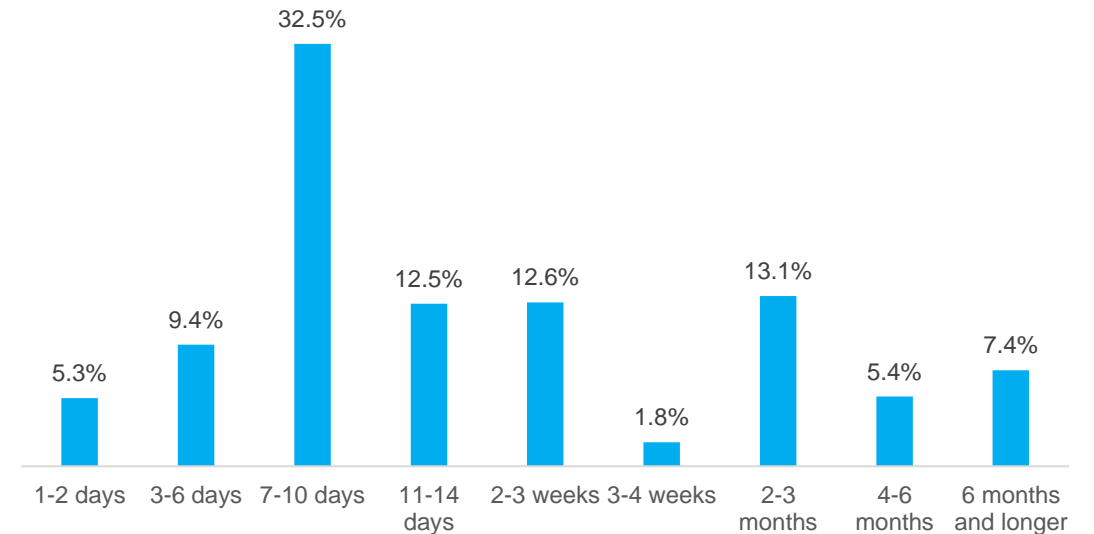


- According to the data collected between January and December 2023, it was found that almost half of the visitors (48.1%), chose to stay overnight in the province, while the remaining 51.9% preferred day trips.
- In addition, during this period, about 27.7% of the visitors stayed for seven or more nights, whereas 32.5% stayed for seven to ten days in the Western Cape. This information is depicted in Figures 9 and 10.

4.6 Figure 9: Average length of stay (nights) in the Western Cape



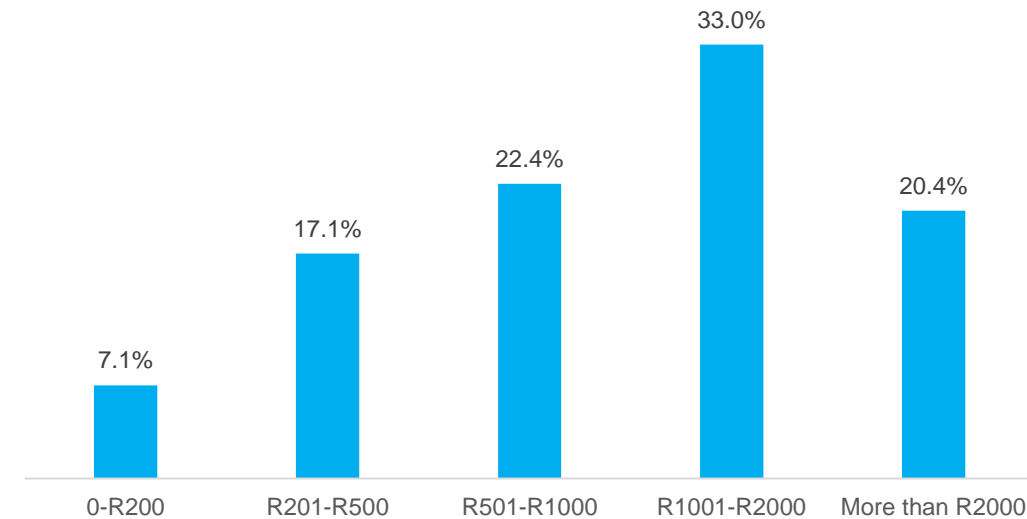
4.7 Figure 10: Average length of stay (days) in the Western Cape



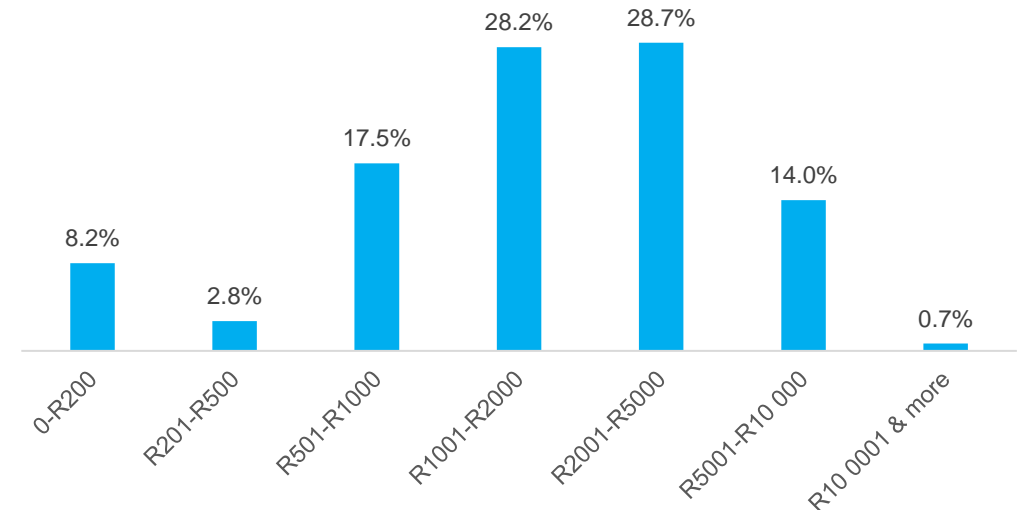
4. Western Cape visitor trends & patterns

- According to the 2023 data, it was found that 33.0% of visitors who visited the region spent an average of R1001–R2000 daily, as shown in Figure 11. This was followed by 22.4% of visitors who indicated that they spent an average of R501–R1000 on their daily expenses. In addition, it was found that 20.4% of visitors spent more than R2000 daily.
- When it came to average spending on accommodation, Figure 12 shows that 28.7% of visitors spent between R2001 and R5000 on their accommodation. This was followed by 28.2% who indicated they spent R10001-R2000 during their stay in the province.

4.8 Figure 11: Average daily spend



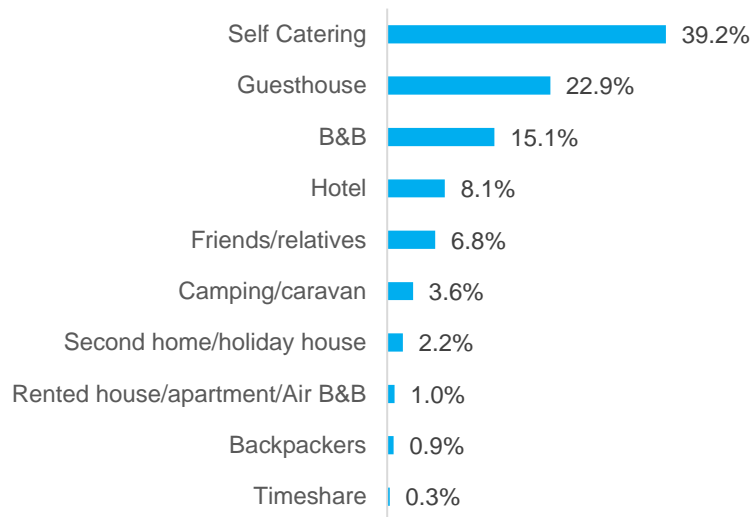
4.9 Figure 12: Average spend on accommodation



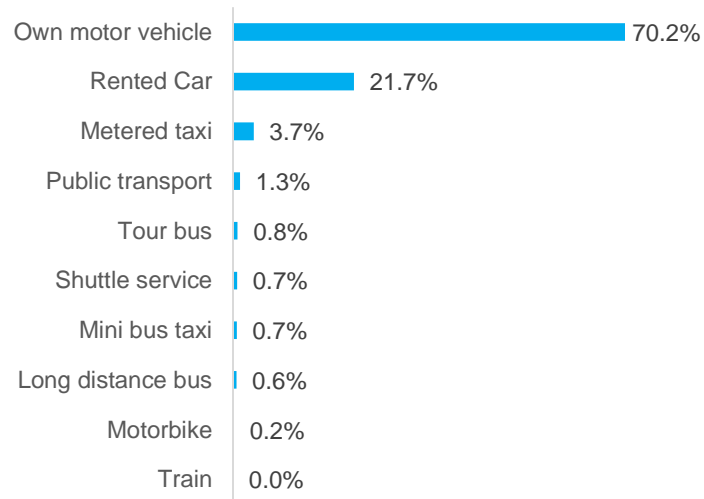
4. Western Cape visitor trends & patterns

- According to the result of the 2023 survey summarised in Figure 13, self-catering accommodations, guesthouses, and bed and breakfast (B&B) establishments were the most popular types of lodging options preferred by travellers visiting the Western Cape.
- Figure 14 shows that more than 70.2% of visitors chose to use their own motor vehicles while exploring the province.
- It is worth noting that visitors' information centres (31.7%), word of mouth (27.5%), and return visits (13.7%) were identified as the most trusted sources of information by visitors when planning their trips to the Western Cape, as shown in Figure 15. This highlights the importance of having accurate and relevant information readily available to aid visitors in their decision-making processes.

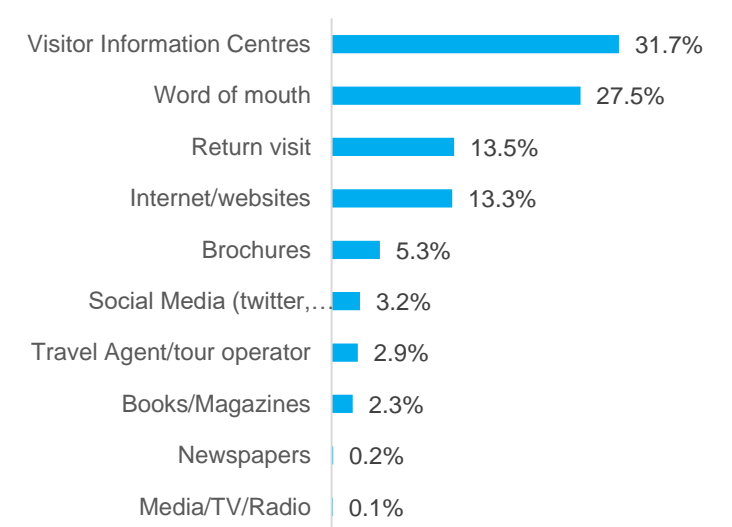
4.10 Figure 13: Accommodation usage



4.11 Figure 14: Mode of transport

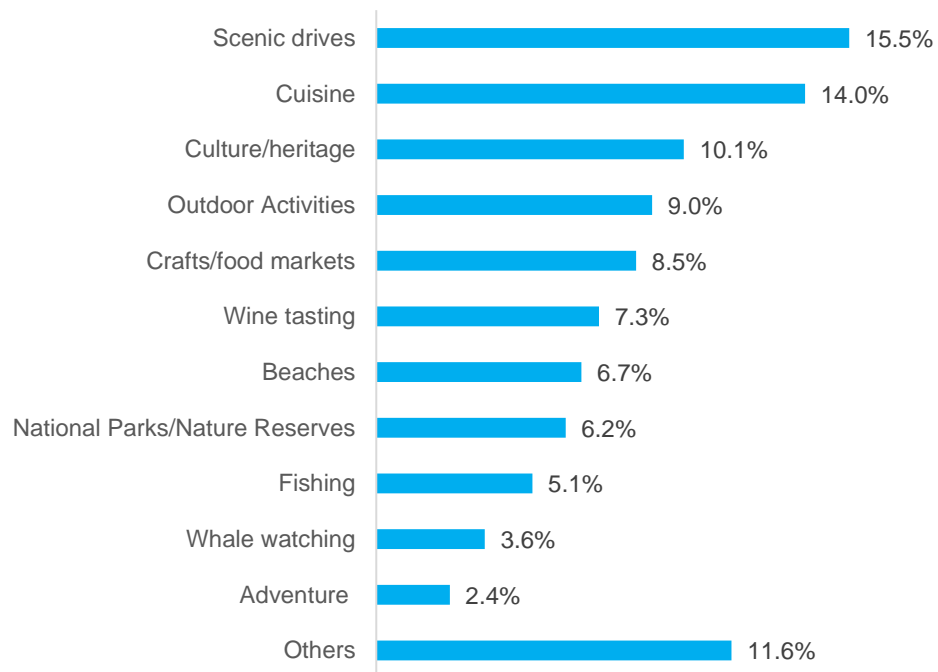


4.12 Figure 15: Top information sources



4. Western Cape visitor trends & patterns

4.13 Figure 16: Top activities undertaken in the Western Cape



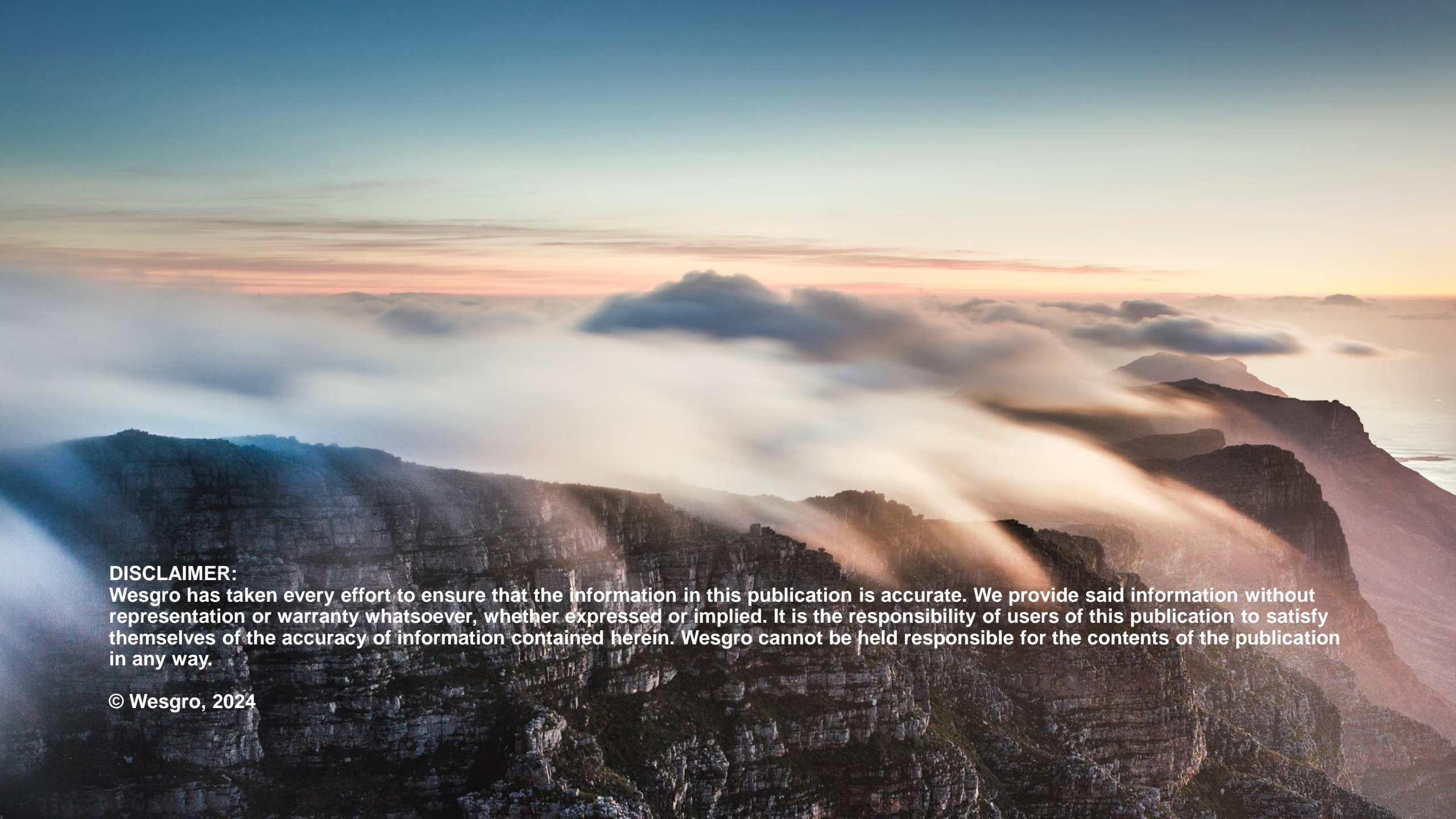
- According to the data displayed in Figure 16, it appears that tourists who travelled to the province had varying tastes and preferences regarding the activities in which they engaged.
- It has been observed that tourists have a strong inclination towards indulging in various activities while exploring a region. Among these activities, scenic drives, sampling diverse cuisines, exploring cultural and heritage sites, engaging in outdoor activities, and visiting crafts and food markets are some of the most popular choices for visitors.
- These were the top five activities in 2023 which were extremely popular among visitors and gained a lot of traction over time. These activities were highly favoured and enjoyed by many of the visitors to the province.

5. Acknowledgements

Acknowledgments and many thanks go to the following district municipalities and their tourism offices for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating district municipalities:

Garden Route & Klein Karoo
Overberg
Weskus
Winelands



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