



Cape Town Regional Trends

WESGRO
cape town & western cape
research

January-December 2019

An inspiring place to know

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1. Methodology

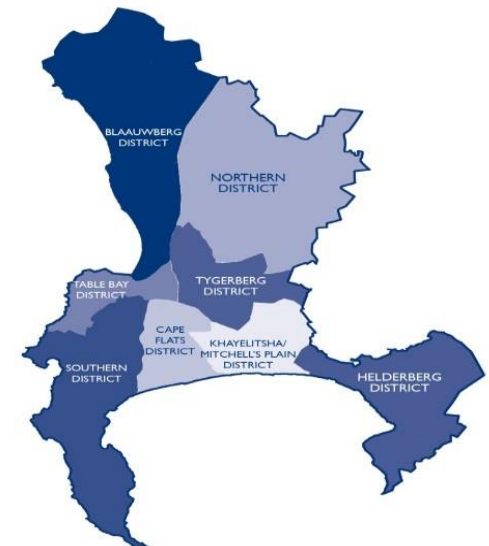
- This report provides an overview of the tourism trends and patterns in Cape Town. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.
- Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western 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.
- Data for the regional visitor tracking survey, from which regional trend data was drawn, was captured when a visitor booked with a consultant (convenience sampling) and only represents part of the visitor population.
- **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

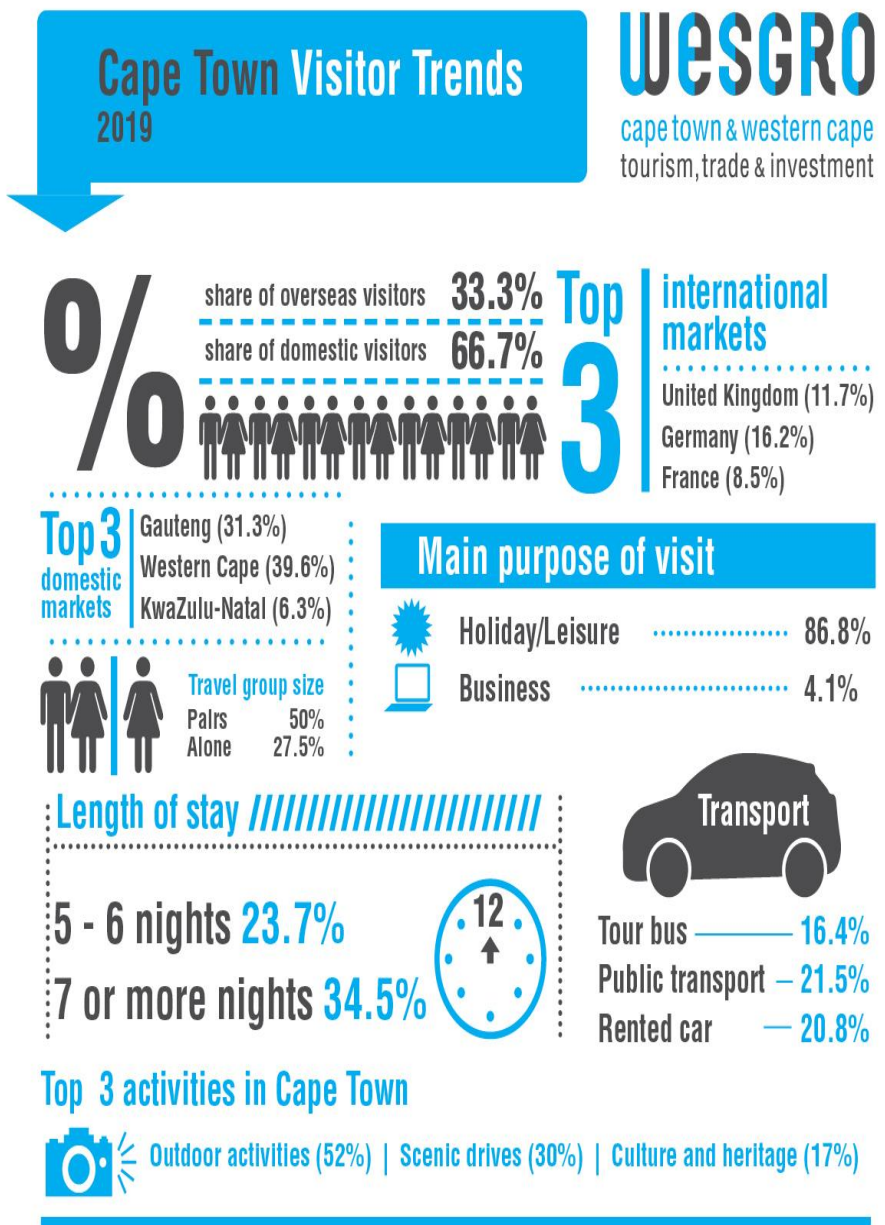
In 2019, a total of **750** responses to the regional visitor tracking survey were received from the respective Visitor Information Centres (VICs) in Cape Town. The participating VICs were:

Cape Town Central	351
Long Street	229
Cape Town International Airport	59
Southeys Vines	41
Simons Town	31
Mobile VIC	21
Kirstenbosch	18



3. Executive Summary

- Visitor engagements at the respective Cape Metropole Visitor Information Centres (VICs) reflected 67.7% coming from the domestic market and 32.3% originating from overseas markets.
- Cape Town continues to hold a strong demand for leisure travel, with holiday/leisure (86.8%) ranking as the leading motivation for travel, followed by business (4.1%).
- Germany (16.2%), the United Kingdom (11.7%) and France (8.5%) ranked as Cape Town's top three international markets into the VICs. The domestic market was led by travellers from the Western Cape (39.6%) and Gauteng (31.3%).
- Visitors to Cape Town primarily travelled as pairs (50.1%), followed by 27.5% who were solo travellers. 92.3% of respondents indicated to be overnight visitors, 34.5% of which enjoyed extended stays of a week and more in the city. A further 23.7% indicated overnight stays of 5-6 nights.
- The city benefits from two major national highways and a strong network of tour operators and guides operating on these routes. Public transport (21.5%) are a particularly popular form of exploring Cape Town, followed by rented cars (20.8%) and tour busses (16.4%).
- Word of mouth (24.9%) ranked as the top information source amongst visitors to Cape Town. The internet (8.1%) emerged as an equally strong tool for information. 9.7% of these visitors were return visitors, an extremely important market for industry role-players to tap into and grow.
- The top five activities enjoyed in Cape Town included outdoor activities, scenic drives, culture/heritage, wine tasting, and National Parks/Nature Reserves.
- The attractions highlighted in this report includes the renowned Table Mountain Aerial Cableway, Table Mountain National Park, Kirstenbosch National Botanical Garden, Table Mountain's Boulders Beach, Cape of Good Hope, and Robben Island. These attractions collectively welcomed close to 7.5 million visitors in 2019. This does not include the V&A Waterfront which usually records around 25 million visitors annually.
- In 2019 Wesgro embarked on a real-time tourism research project aimed at collecting tourism information from foreign and domestic tourists through the use of on-board vehicle Wi-Fi. The solution was installed on a select number of tour operator vehicles that operate in Cape Town and the Western Cape in order to ensure the highest level of interaction with tourists. The system allows passengers to access the Wi-Fi through an easy anonymous login solution. The project took off during June/July 2019 and data was collected from more than 8 000 unique users with 82 000 data points collected over the June to December 2019 period. Findings obtained from this project will be highlighted in this report.

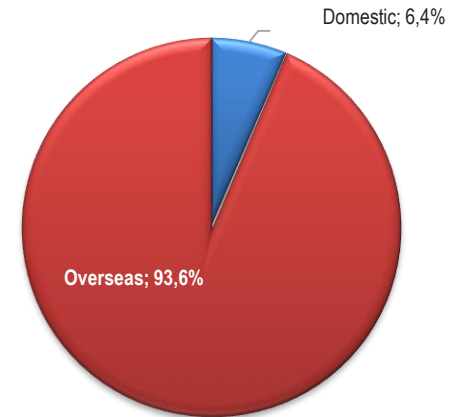


4. Cape Town Visitor Trends & Patterns

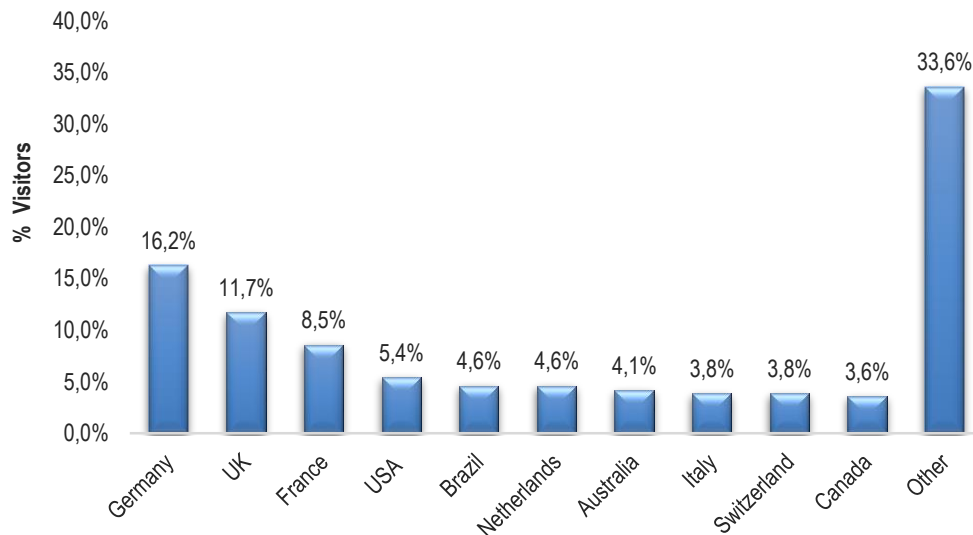
4.1 Origin of Visitors

- Visitor engagements at the various Cape Metropole Visitor Information Centres (VICs) reflected 67.7% coming from the domestic market and 32.3% originating from overseas markets. However, visitors who responded to the visitor tracking surveys made up 93.6% of travellers to Cape Town over the Jan – Dec 2019 and 6.4% originated from the domestic market.
- The top five international markets who conducted bookings at the respective Cape Town VICs included Germany (16.2%), the United Kingdom (11.7%), France (8.5%), United States (5.4%), and Brazil (4.6%).
- Despite financial and economic constraints, trends indicate that domestic travellers continue to travel. The largest share of domestic travellers to the region originated from the Western Cape, followed by Gauteng and Kwazulu Natal.

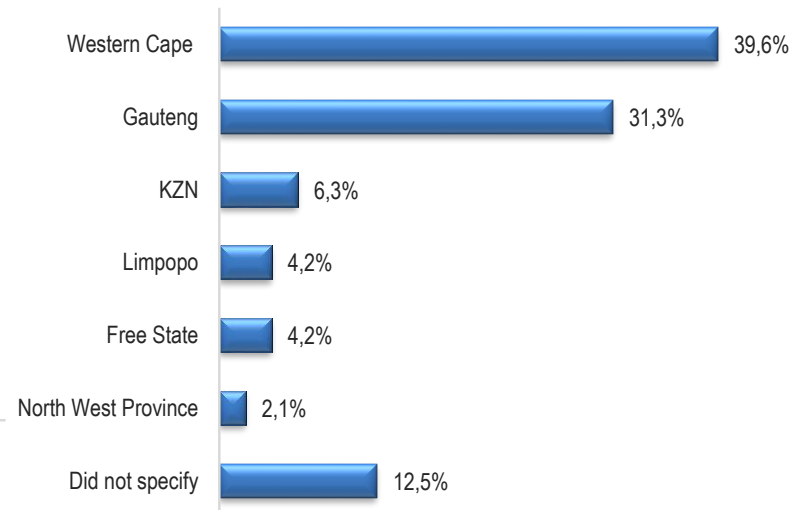
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO CAPE TOWN, 2019



% SHARE OF INTERNATIONAL VISITORS TO CAPE TOWN, 2019

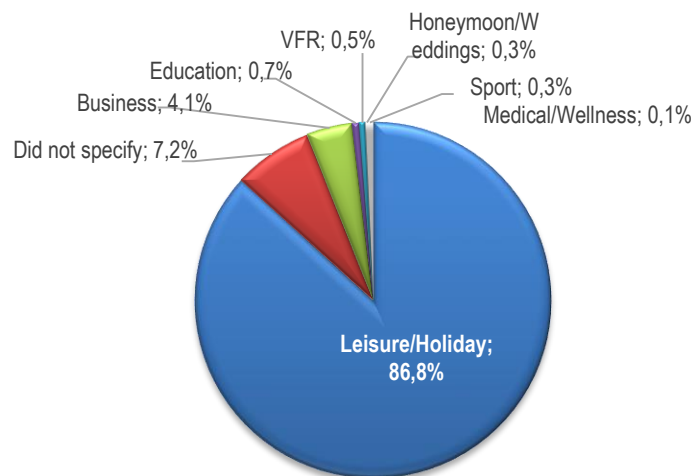


% SHARE OF DOMESTIC VISITORS TO CAPE TOWN, 2019

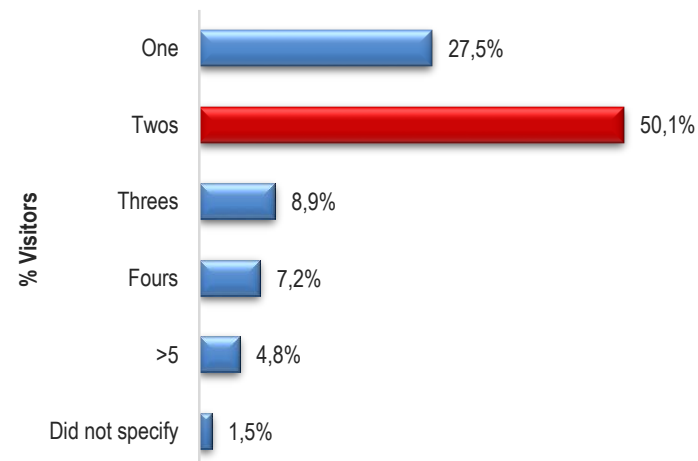


4. Cape Town Trends and Patterns

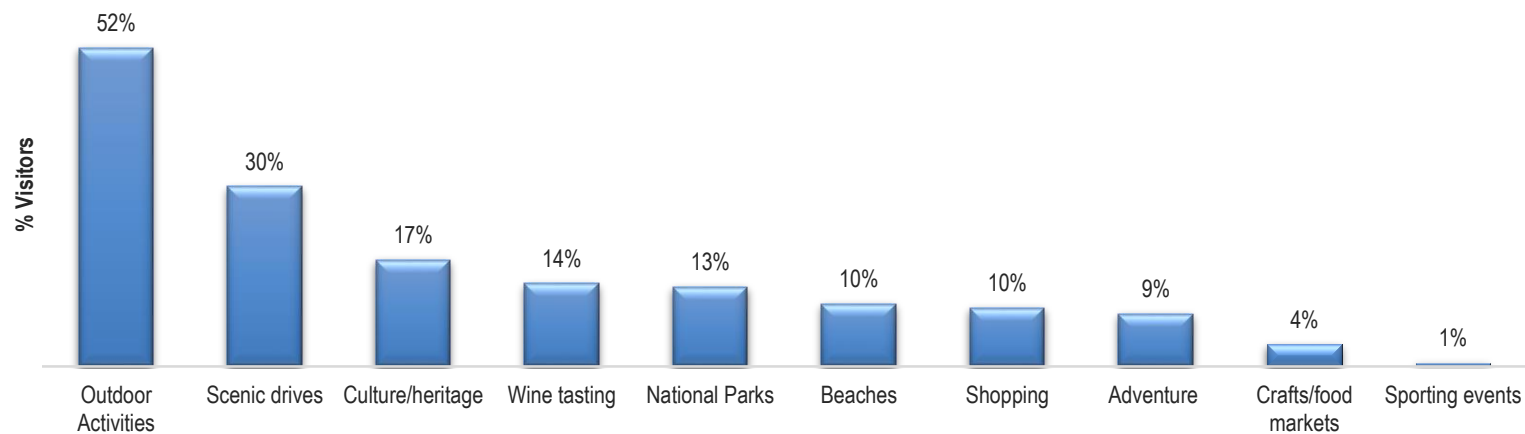
4.2 Main Purpose of Visit



4.3 Travel Group Size

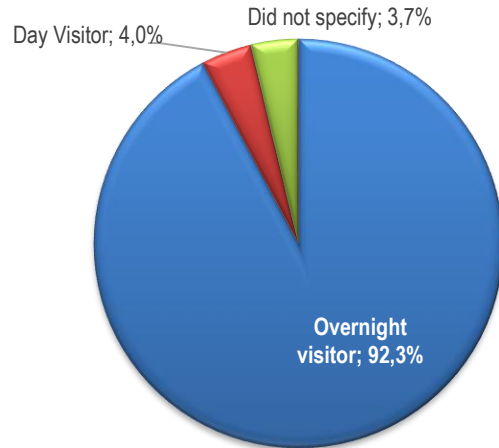


4.4 Top Activities Undertaken in Cape Town

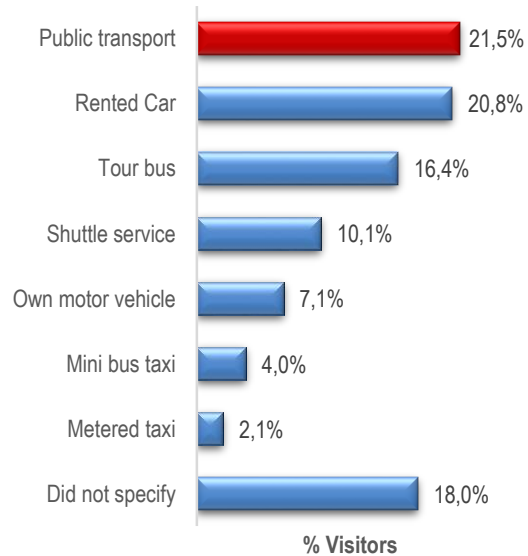


4. Cape Town Trends and Patterns

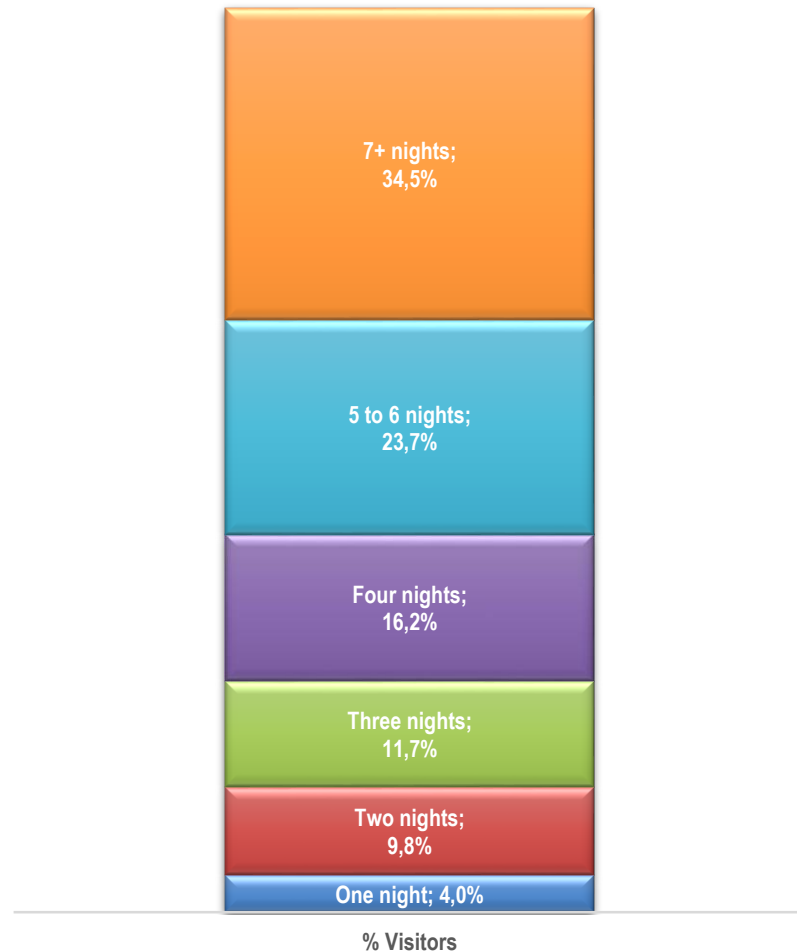
4.5 Overnight Spent



4.7 Mode of Transport



4.6 Average Length of Stay



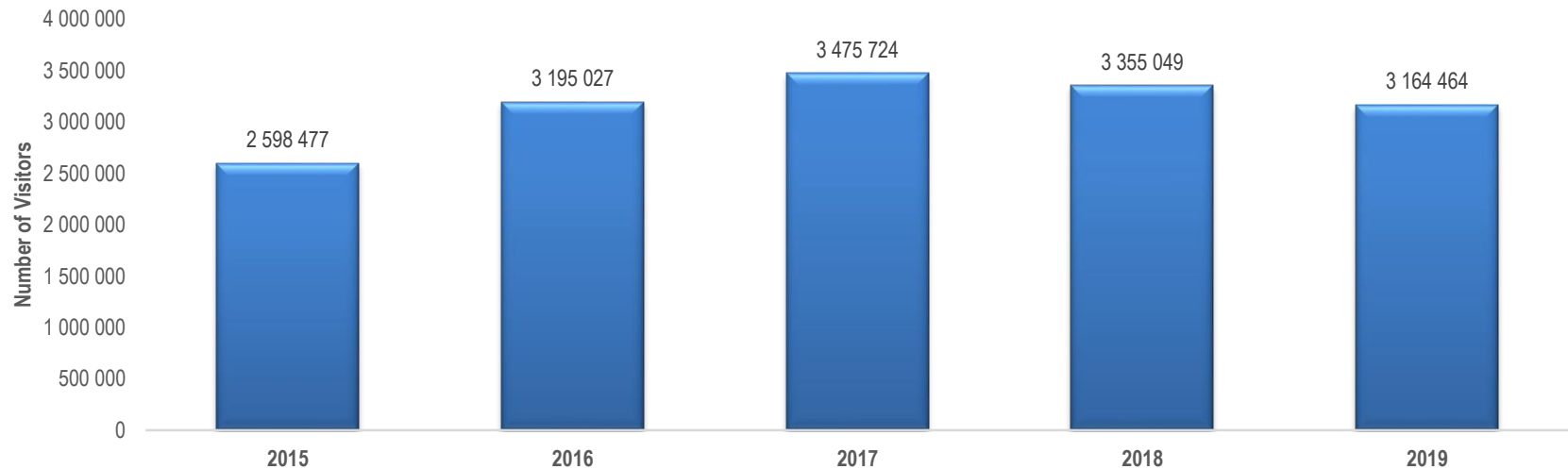
5. Performance of Cape Town Attractions

Attraction	Total visitors 2019	18/19 % Change
Table Mountain National Park	3 164 464	-5,7%
Table Mountain Aerial Cableway	1 099 615	-5,4%
Table Mountain National Park: Cape of Good Hope	1 135 894	-1,6%
Kirstenbosch National Botanical Garden	921 421	-1,3%
Table Mountain National Park: Boulders	820 351	-8,1%
Robben Island	315 821	1,3%

Sources: Table Mountain National Park, SANParks, Table Mountain Aerial Cableway, Robben Island, and Kirstenbosch National Botanical Garden, 2020

- For this section, visitor movement to Cape Town's top attractions were reviewed. These include the city's most iconic attractions for which visitor statistics were available.
- The attractions highlighted in this section includes the renowned Table Mountain Aerial Cableway, Table Mountain National Park, Kirstenbosch National Botanical Garden, Table Mountain's Boulders Beach, and Cape of Good Hope, and Robben Island.
- In 2019, Table Mountain National Park reached over 3.1 million visitors, however, registered a decline of 5.7% year-on-year.
- Despite the year-on-year decline in 2019, the park has maintained its 3 million mark across the last four years. These figures highlight the strong demand and sustainability of this iconic attraction.

VISITORS TO THE TABLE MOUNTAIN NATIONAL PARK, 2015 - 2019

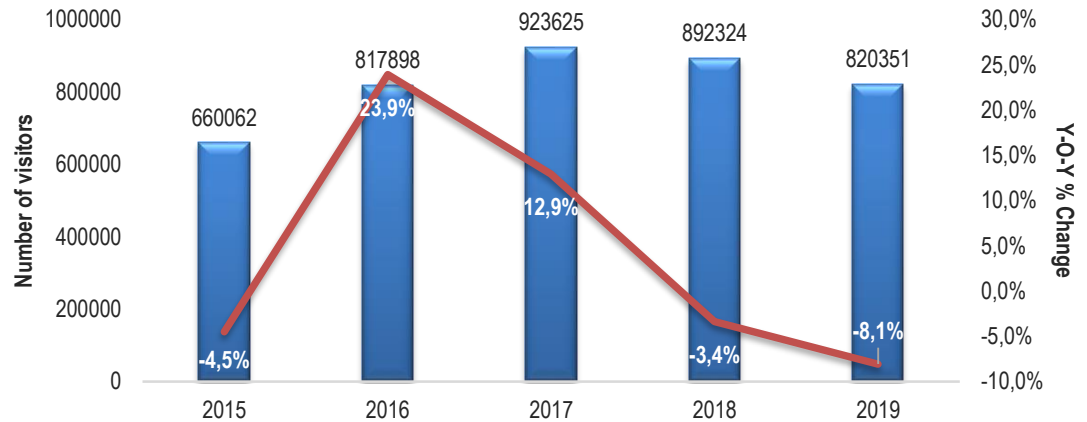


Source: SANParks, 2019

5. Performance of Cape Town Attractions

- The local inhabitants at Boulders Beach knows how to pull the crowds. Boulders attracted over 800,000 visitors in 2019, and registered a marginal year-on-year decline of 8.1%.
- The African Penguins can be found from southern Namibia all the way around the South African coast to Port Elizabeth; however, few places offer as remarkable a viewing point as Boulders Beach.

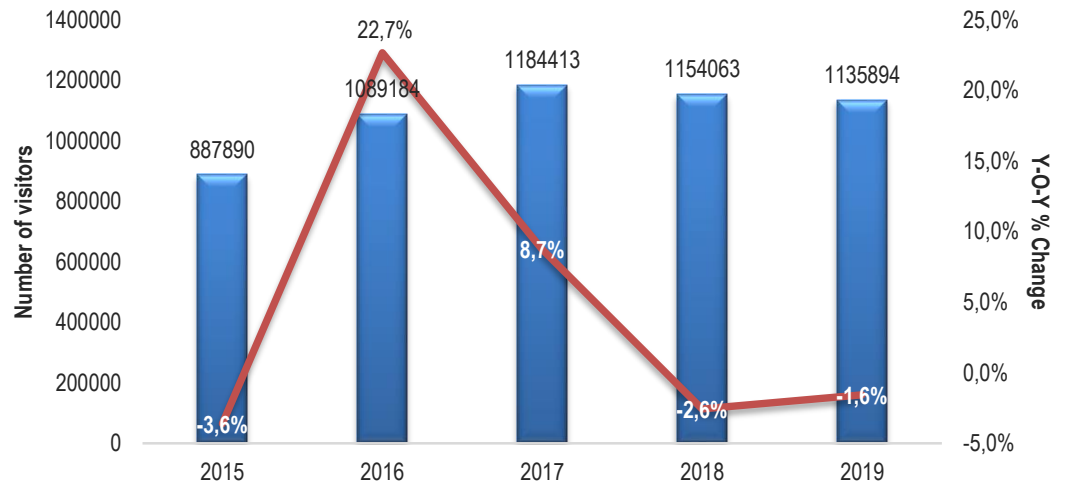
VISITORS TO THE TABLE MOUNTAIN NATIONAL PARK: BOULDERS, 2015-2019



Source: Table Mountain National Park, 2019

- The Cape of Good Hope nature reserve within Table Mountain National Park forms part of the Cape Floral Region, a World Heritage Site. It includes the majestic Table Mountain chain, which stretches from Signal Hill to Cape Point, coupled with the coastlines of the Cape Peninsula.
- This narrow stretch of land contains a mix of extraordinarily diverse and unique fauna and flora. The Cape of Good Hope welcomed over 1.1 million visitors in 2019 and maintained the 1 million visitor mark since 2016.

NUMBER OF VISITORS TO TABLE MOUNTAIN NATIONAL PARK: CAPE OF GOOD HOPE, 2015-2019

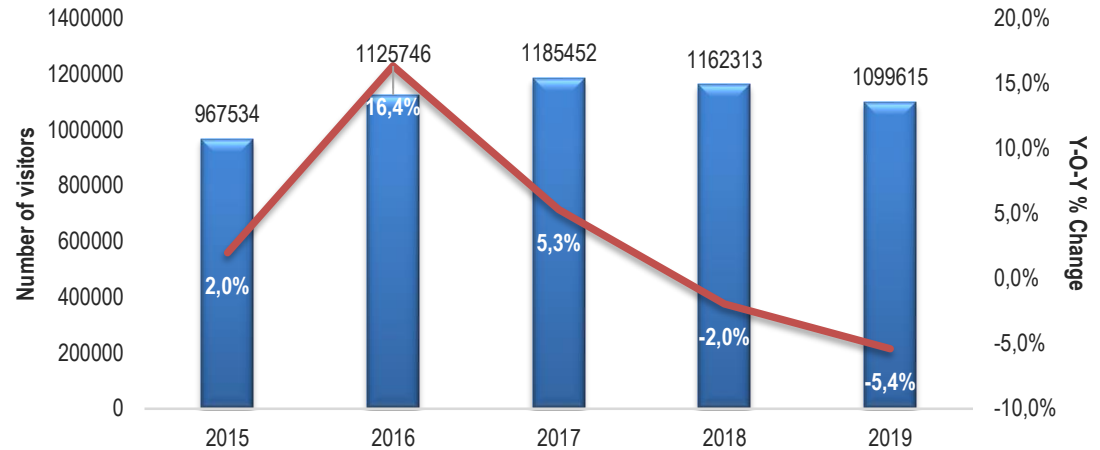


Source: Table Mountain National Park, 2019

5. Performance of Cape Town Attractions

- Despite being a weather permitting attraction, the Cableway reached their 1 million mark in 2016 and has proven to be a strong icon for Cape Town, maintaining a solid share of annual visitors in 2018 and 2019. Over 1 million visitors enjoyed the Cableway in 2019.
- With seasonality and environmental challenges, the Cableway saw an overall 5.4% decrease in visitors in 2019.

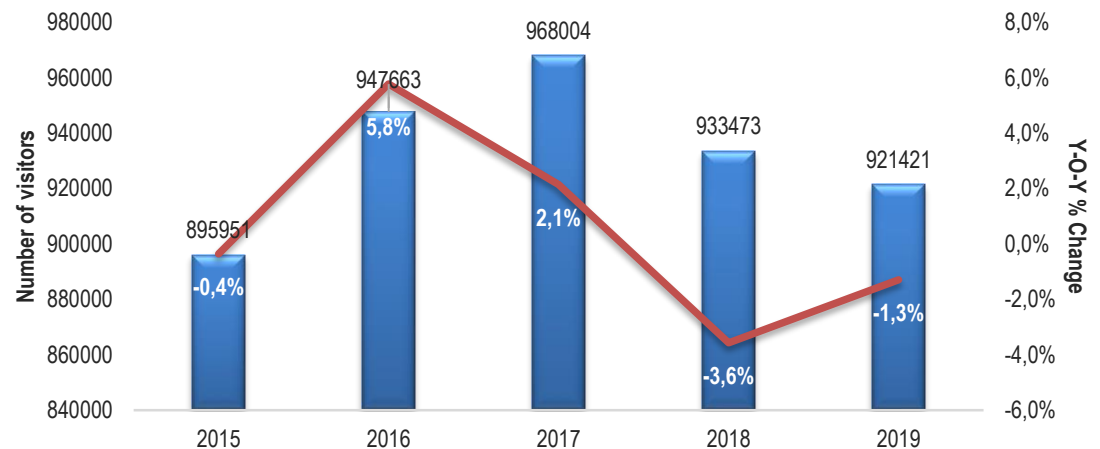
NUMBER OF VISITORS TO TABLE MOUNTAIN AERIAL CABLEWAY, 2015-2019



Source: Table Mountain Aerial Cableway, 2019

- In 2004 the Cape Floristic Region, including Kirstenbosch, was declared a UNESCO World Heritage Site. Kirstenbosch is the first botanical garden in the world to be included within a natural World Heritage Site.
- It is important to note that the visitor numbers illustrated in the figure excludes concerts. Events such as the summer sunset concerts amongst others therefore serves as additional volume and economic contribution to the garden. Across the period under review, Kirstenbosch recorded over 900,000 visitors in 2019, registering a decline of 1.3% year-on-year.

NUMBER OF VISITORS TO KIRSTENBOSCH NATIONAL BOTANICAL GARDEN, 2015-2019



Source: Kirstenbosch National Botanical Garden, 2019

6. Benchmarking Cape Town's Hotel Sector

- STR Global Hotel Performance in 2019 reflected an upward trend in occupancy levels when compared to 2018. By category, the highest percent change (+4,8%) occurred in the Cape Town 5 Stars category.
- On a provincial and city level, Cape Town (1,165.54) and the Western Cape (R1,046.72) as a whole achieved the highest revenue amongst all provinces and top cities in 2019.
- By region, a positive year-on-year growth was recorded in the average daily rate (ADR) achieved across all regions depicted below, with the highest growth (+3.8%) in ADR recorded in the Winelands region.

AVERAGE REVPAR BY PROVINCE, 2019		AVERAGE REVPAR BY CITY, 2019	
South Africa	R787,28	Port Elizabeth	R615,38
Northern Cape	R455,20	Durban	R641,09
Eastern Cape	R623,79	Cape Town	R1,165.54
Limpopo	R525,83	East Rand	R639,06
Free State	R553,54	Pretoria & Surrounds	R527,71
KwaZulu Natal	R711,41	Sandton	R803,75
Mpumalanga	R603,73	Johannesburg	R547,56
Western Cape	R1,046,72		
Gauteng	R673,66		

Year to Date: January-December 2019 vs January-December 2018

Region/City	Occ %		ADR		RevPAR		Percent Change from YTD 2018		
	2019	2018	2019	2018	2019	2018	Occ	ADR	RevPAR
Western Cape	64,1	63,7	1 632,21	1 599,63	1 046,72	1 019,38	0,6	2,0	2,7
Cape Town	65,3	64,1	1 784,43	1 751,97	1 165,54	1 123,33	1,9	1,9	3,8
Cape Town 5 Stars	68,0	64,9	3 242,96	3 181,22	2 206,35	2 065,17	4,8	1,9	6,8
Cape Town 4 Stars	64,7	63,6	1 393,25	1 369,54	901,56	871,40	1,7	1,7	3,5
Cape Town 3 Stars	65,5	66,6	1 032,71	1 014,38	676,61	675,85	-1,7	1,8	0,1
Northern Cape Town	68,1	70,4	1 023,79	1 003,38	697,40	706,18	-3,2	2,0	-1,2
Winelands	57,0	58,6	1 624,75	1 565,28	925,48	916,67	-2,7	3,8	1,0
Garden Route	55,2	56,3	1 285,80	1 275,48	710,16	717,54	-1,8	0,8	-1,0

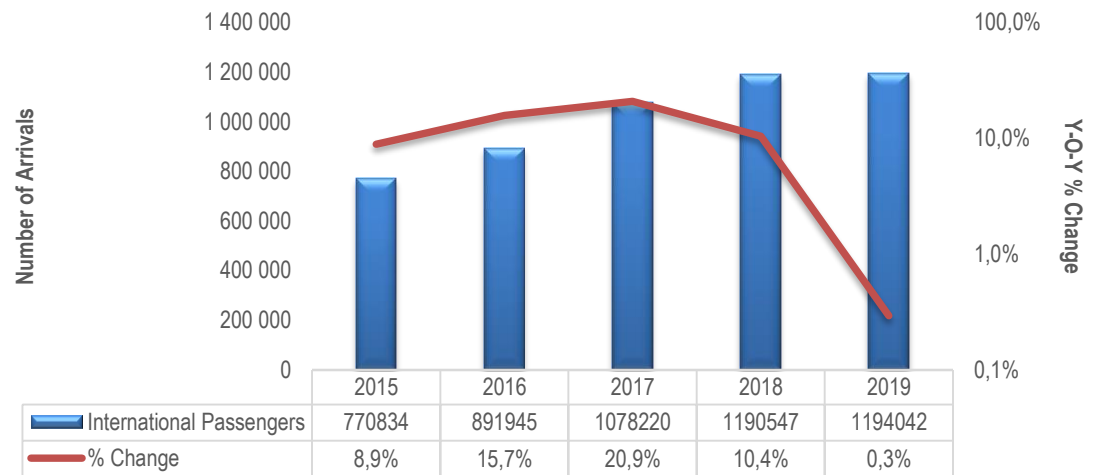
Notes: STR Global Hotel data provides a high-level overview of occupancy (OCC), average daily rate (ADR) and revenue per available room (RevPAR) for key geographical areas within SA.

Source: STR Global, 2020

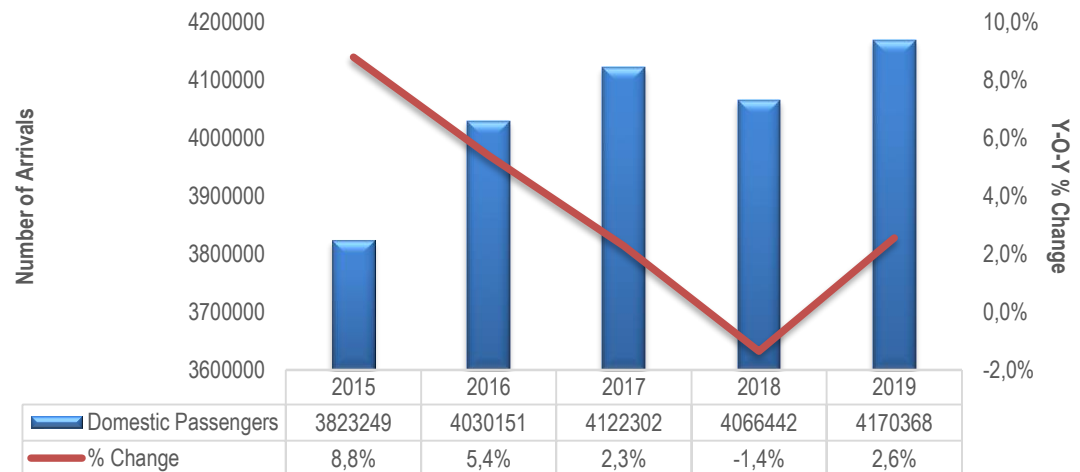
7. ACSA: Cape Town International Airport Arrivals

- International connectivity is key to growing tourism in the Western Cape. Cape Town International Airport is Africa's most award winning airport and was voted the best airport in Africa, **Skytrax 2017 (19th in the world)**.
- As Africa's **3rd largest airport** it records passenger movement of **over 10 million** annually.
- The last 10 years has seen dramatic growth in passenger traffic at the Cape Town International Airport. Total passenger movement (arrivals and departures) reached the 10 million mark in 2016, and continued to show remarkable growth in 2018 (10.8 million) and in 2019 (11 million).
- International arrivals through the Airport increased by 0.3% in 2019, reaching a total of 1.2 million. The steady growth can mainly be attributed to the number of new routes and expansions which have been secured, largely through the collaborative efforts initiated by Wesgro's Air Access Team.
- Despite industry challenges, Cape Town International Airport has seen steady movement from the international market. No declines were recorded for the period under review, indicating that travel to Cape Town in particular is still taking place.
- The domestic market grew by 2.6% in 2019 after a declining trend in 2018. This is a very important market for South Africa, and challenges such as affordability continues to impact local travel hindering the growth of this market. South African Tourism recorded a year-on-year increase of 61.3% citing the growth as largely due to the travel campaigns and special deals which was initiated by SA Trade and SA Tourism (SA Tourism, 2020).

INTERNATIONAL PASSENGER MOVEMENT THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, 2015 - 2019



DOMESTIC PASSENGER MOVEMENT THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, 2015 - 2019



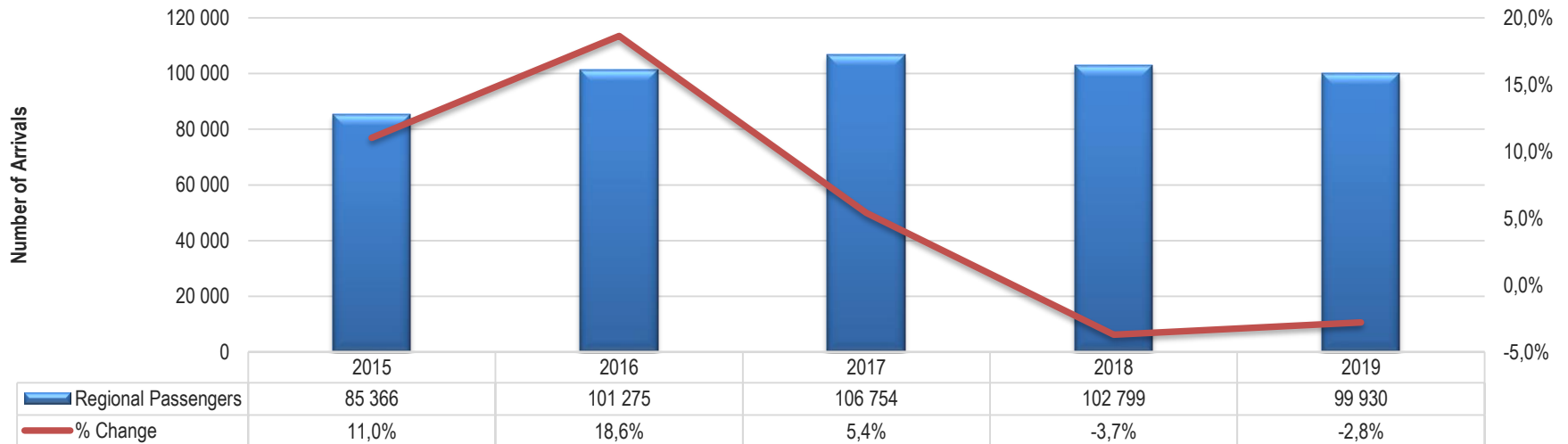
7. ACSA: Cape Town International Airport Arrivals

In terms of regional flight connections, Cape Town International airport carries out regional flights via Johannesburg OR Tambo and offers the following direct regional flights:

The Cape Town airport serves as a key port of connectivity to other cities within Africa with:

- 10 times a week direct flight to Addis Ababa, Ethiopia
- 7 times a week direct flight to Maun, Botswana
- 3 times a week direct flight to Gaborone, Botswana
- 13 times a week direct flight to Walvis Bay, Namibia
- 35 times a week direct flight to Windhoek, Namibia
- 3 times a week direct flight to Livingstone, Zambia
- 7 times a week direct flight to Luanda, Angola
- 2 times a week direct flight to Mauritius Island, Mauritius
- 3 times a week direct flight to Victoria Falls, Zimbabwe

REGIONAL ARRIVALS THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, 2015 - 2019



***Regional Arrivals** are defined by the Government Gazette by the landing charge in respect of an aircraft which lands at a company airport that has been engaged in a flight where the airport of departure of that aircraft is Botswana, Lesotho, Namibia or Swaziland.

Source: ACSA, 2019

8. Real-time data Wi-Fi Project

In 2019 Wesgro embarked on a real-time tourism research project aimed at collecting tourism information from foreign and domestic tourists through the use of on-board vehicle Wi-Fi. The solution was installed on a select number of tour operator vehicles that operate in Cape Town and the Western Cape in order to ensure the highest level of interaction with tourists.

The system allows passengers to access the Wi-Fi through an easy anonymous login solution. A series of questions are asked in such a way that it does not become off-putting to the user. Question deployment are staggered and optimised to maximise the user experience.



10:03

imon.zone
imOn-free

< >

Log In

Cancel

**CAPE TOWN
& WESTERN CAPE**
marketed by WESGRO

Before we get you connected, please be so kind as to participate in our anonymous visitor survey below. The aim of the survey is to gather key market research trends, which will allow us to enhance and further develop the tourism sector of the Western Cape.

Country of Origin:

Select...

Your age group:

Select...

BACK 1 of 2 NEXT

8. Real-time data Wi-Fi Project

10:03 4G

imon.zone
imOn-free

< > Log In Cancel

**CAPE TOWN
& WESTERN CAPE**
marketed by WESGRO

Please indicate your travel group size:

Select...

Please indicate your length of stay in the Western Cape (number of nights):

Select...

BACK 2 of 2 DONE

Don't spend hours phoning around for Insurance quotes.

hippo.co.za

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FREE WIFI ZONE

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**CAPE TOWN
& WESTERN CAPE**
marketed by WESGRO

Please indicate your main purpose of visit to this town:

Select...

Main activities participated in during your stay in this town (please select three):

Select...

BACK 1 of 2 NEXT

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FREE WIFI ZONE

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**CAPE TOWN
& WESTERN CAPE**
marketed by WESGRO

Type of accomodation used during your stay in this town:

Select...

Please indicate where you obtained your information from about the destination:

Select...

BACK 2 of 2 DONE

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8. Real-time data Wi-Fi Project

The project took off during June/July 2019 and data was collected from more than 8 000 unique users with 82 000 data points collected over the June to December 2019 period.



Data Points

124785

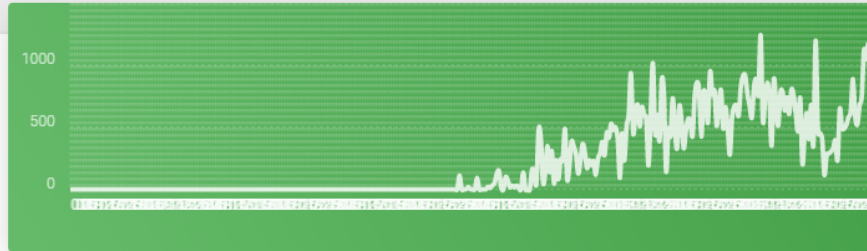
Today: 474

7 Days: 3341

30 Days: 18330

90 Days: 55381

180 Days: 111940



Data Points Collected

Day 31: 788

Period Total: 82122

01 Jan '19 - 31 Dec '19



Unique Users

10984

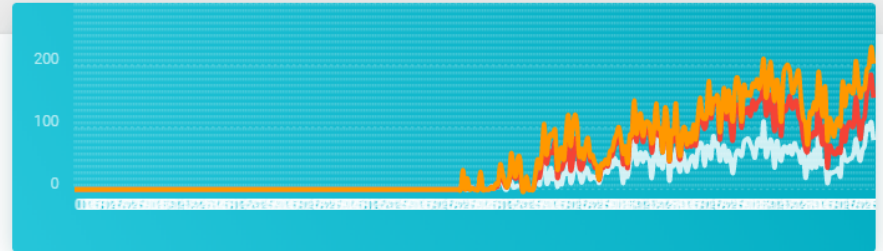
Today: 44

7 Days: 295

30 Days: 1627

90 Days: 4930

180 Days: 9834



Users Connected

NEW USERS

Day 31: 79

Period: 8223

ALL USERS

Day 31: 147

Period: 15532

CONNECTIONS

Day 31: 202

Period: 18378

01 Jan '19 - 31 Dec '19

8. Real-time data Wi-Fi Project

Survey results from the real-time data collected during 2019 are consistent with the general visitor trends as seen through the survey data collected via the Cape Town Visitor Information Centres. The UK and USA are amongst the top international markets to the Western Cape and the most popular reason for travel is Leisure followed by Business. The Wi-Fi Project data was collected via Tour Operators, however, a significant amount of respondents also made use of rented cars as their main mode of transport which suggests that tourists are exploring the city via tour groups as well as on their own.

Survey Stats

Top answers per question

Question

Country of Origin:

1st: South Africa - 1812 - 25%
2nd: United States of America - 1091 - 15%
3rd: United Kingdom - 1030 - 14%

Your age group:

1st: 21-35 - 2417 - 34%
2nd: 51-70 - 1882 - 27%
3rd: 36-50 - 1630 - 23%

Please indicate your travel group size:

1st: 5 & more - 3965 - 56%
2nd: 2 - 1264 - 18%
3rd: 4 - 699 - 10%

Please indicate your length of stay in the Western Cape (number of nights):

1st: 4 - 1389 - 20%
2nd: 3 - 1227 - 17%
3rd: 6 - 982 - 14%

Please indicate your main purpose of visit to this town:

1st: Leisure/holiday - 4929 - 71%
2nd: Business (meetings, incentives, conferences, exhibitions) - 520 - 8%
3rd: Events/festivals - 373 - 5%

Main activities participated in during your stay in this town (please select three):

1st: Culture/heritage/museums/township tours - 2753 - 19%
2nd: Gourmet restaurants/cuisine - 1933 - 13%
3rd: Crafts/food markets/slow markets - 1497 - 10%

Survey Stats

Top answers per question

Question

Type of accommodation used during your stay in this town:

1st: Hotel - 4641 - 69%
2nd: Guesthouse - 623 - 9%
3rd: Day visitor - 394 - 6%

Please indicate where you obtained your information from about the destination:

1st: Internet/websites - 2339 - 35%
2nd: Word of mouth - 1540 - 23%
3rd: Social media - 814 - 12%

Please indicate main mode of transport:

1st: Tour bus - 3441 - 53%
2nd: Rented car - 949 - 14%
3rd: Long distance bus - 665 - 10%

Your average daily spend (Excluding accommodation):

1st: R201-R500 - 1861 - 29%
2nd: R501-R1000 - 1643 - 25%
3rd: R0-R200 - 1196 - 19%

Your average daily spend on accommodation during your stay in this town:

1st: R501-R1000 - 1408 - 22%
2nd: R1001-R2000 - 1302 - 20%
3rd: R201-R500 - 1273 - 20%

9. 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 Visitor Information Centres (VICs) in the Cape Metropole:

- Cape Town Central
- Cape Town International Airport
- Kirstenbosch
- Simon's Town
- Southey's Vines
- Mobile VIC
- Long Street

The participating indicators and attractions in Cape Town:

- Kirstenbosch National Botanical Garden
- Table Mountain Aerial Cableway
- Robben Island
- South African National Parks Board
- Table Mountain National Park
- ACSA: Cape Town International Airport
- STR Global

Real time Wi-fi Solution supplied by imOn Connect Solutions (Pty) Ltd

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