Cape Garden Route & Klein Karoo Visitor Trends

WESGRO
cape town & western cape
research

January – June 2019

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.

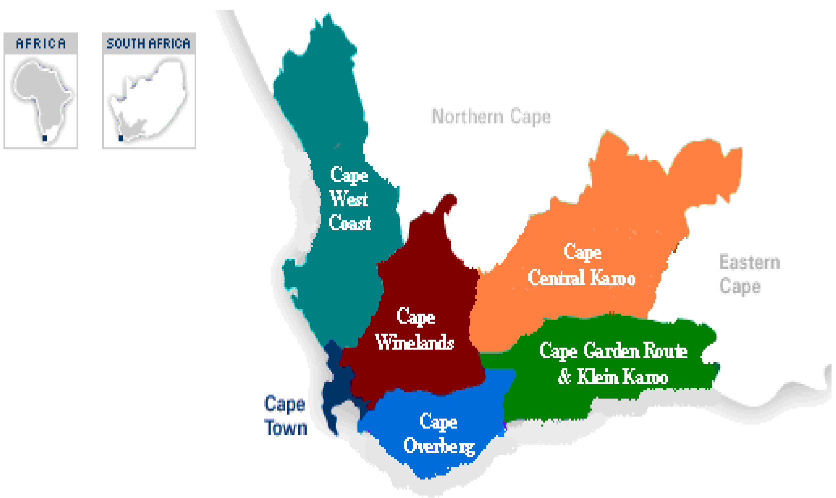
Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a <u>*sample*</u> *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: <u>*Tourist:*</u> *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

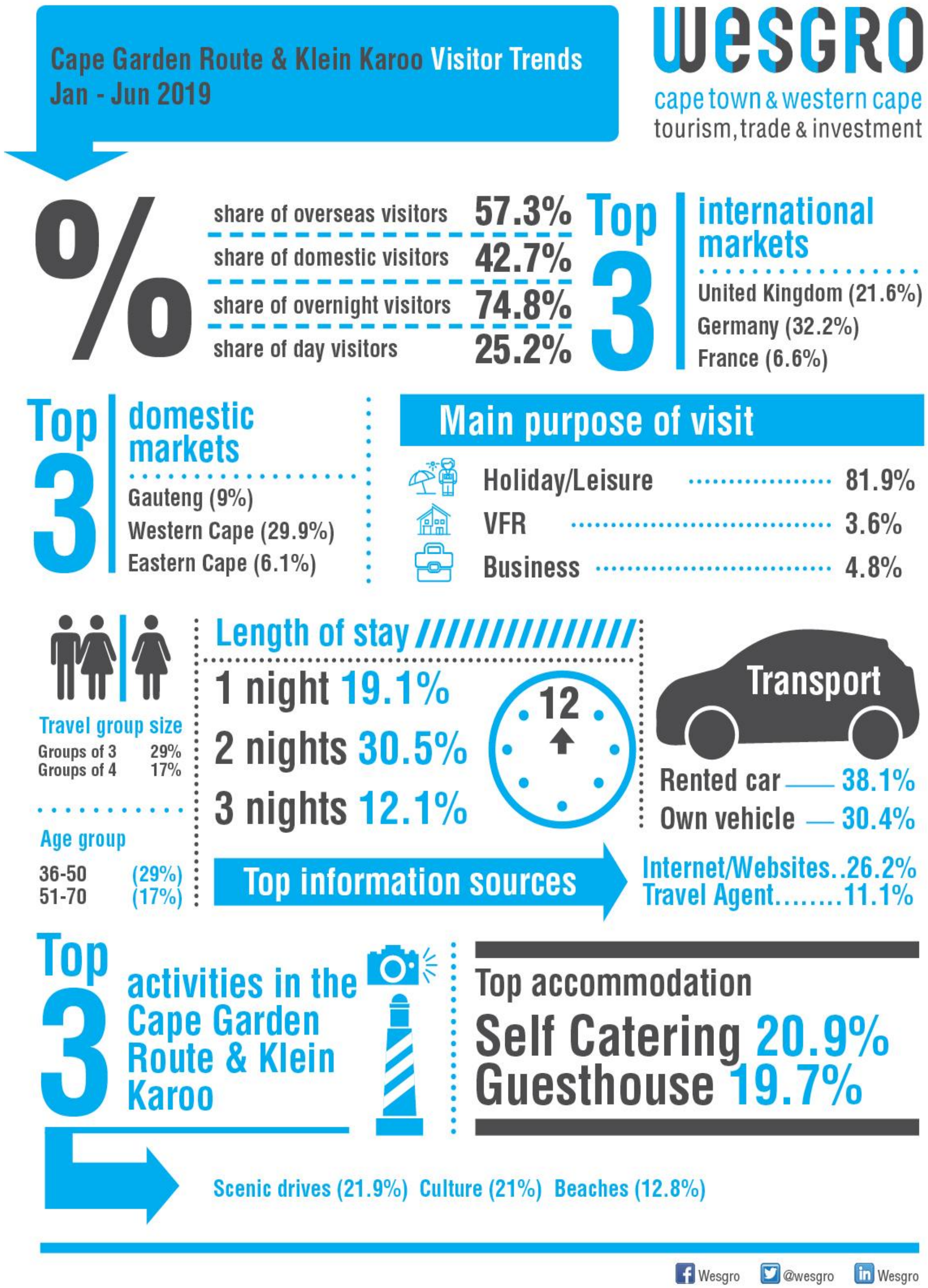
Between January and December 2018, a total of **2306** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Garden Route & Klein Karoo. The participating Tourism Offices were:

Calitzdorp	75
George	230
Knysna	369
Oudtshoorn	765
Pacalsdorp	24
Plettenberg Bay	217
Uniondale	159
Wilderness	467



3. Executive Summary

- Visitor surveys conducted between January and June 2019 reflected a fair number of international visitors with 57,3% of all visitors to the Cape Garden Route & Klein Karoo indicating to be overseas visitors.
- The top international markets to the region were Germany (32,2%), United Kingdom (21,6%), and France (6,6%).
- The Western Cape ranked as the top domestic province to the region with 29.9% of domestic travelers originating from the Western Cape.
- The age profile indicates that visitors were predominantly in the 36 – 50 (29,0%) and 51 – 70 (17,0%) age categories.
- Group travel was preferred with 46,0% of respondents indicating that they were travelling in groups of three or more and 15,1% travelled in pairs. 1,5% of respondents indicated that they were travelling alone.
- Respondents indicated rented car (38,1%), and own motor vehicle (30,4%) as their preferred choice of transport to the region.
- The vast majority of respondents (81,9%) cited holiday/leisure as the main purpose of their journey which affirms the region as a favorable holiday destination.
- Scenic drives was considered the main activity for 21,9% of travelers. In addition visitors cited culture/heritage (21,0%) and beaches (12,8%) amongst the top activities undertaken in the Cape Garden Route & Klein Karoo.
- Day visitors accounted for 25,2% of travelers to the region and 74,8% of visitors stayed overnight.
- Overnight visitors spent an average of 2 nights (30,5%), 1 night (19,1%) or 3 nights (12,1%) in the Cape Garden Route & Klein Karoo.
- Self Catering and Guesthouse were the preferred accommodation types amongst respondents.
- Internet (26,2%) and travel agent/tour operator (11,1%) were the two main sources used by visitors to obtain information about the region.
- The Cape Garden Route & Klein Karoo attractions received a total of 313 716 visitors over the period January to June 2019.

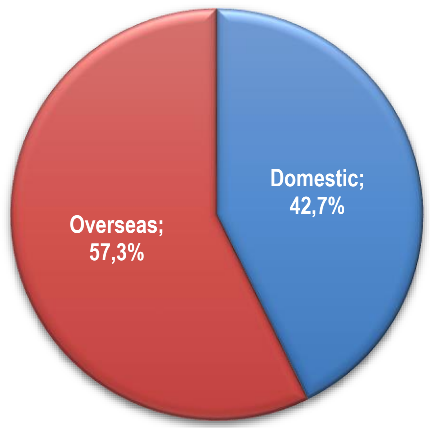


4. Cape Garden Route & Klein Karoo Trends & Patterns

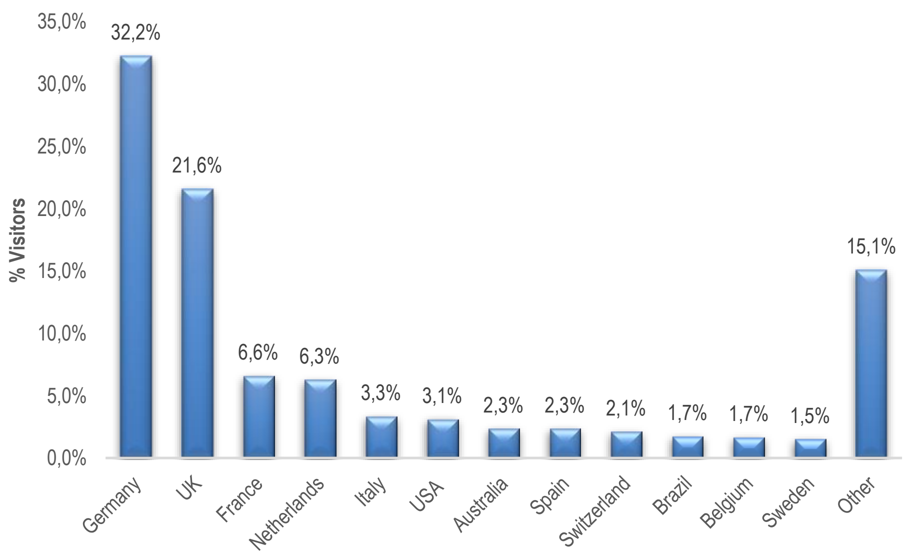
4.1. Origin of visitors

- Overseas visitors made up 57,3% of travellers to the Cape Garden Route & Klein Karoo over the Jan – Jun 2019 period.
- Traditional markets such as Germany and the United Kingdom ranked as the region's top two international markets.
- European travellers continue to drive tourism activity in the Cape Garden Route & Klein Karoo. In addition to France, Netherlands, Italy, Spain, Switzerland, Belgium and Sweden, nearly a third of countries grouped under the 'Other' category are European.
- In addition, the region saw visitors traveling from South American countries such as Argentina, Brazil, Colombia, Chile and Mexico, as well as UAE, Saudi Arabia, and Israel in the Middle East, and Australia and New Zealand in the Australasian region. India and China were the leading markets from the Asian continent.
- Of the 985 South African respondents 29,9% indicated to be from the Western Cape, 9,0% were from Gauteng and 6,1% respondents were from Eastern Cape. 43,0% of respondents who indicated to be from South Africa did not specify the province where they originated from. The results therefore do not reflect a true statistical representation of visitors by province.

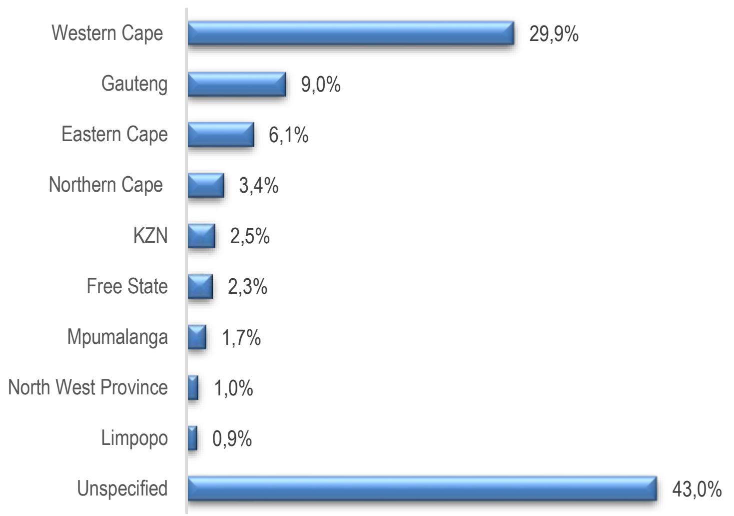
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2019



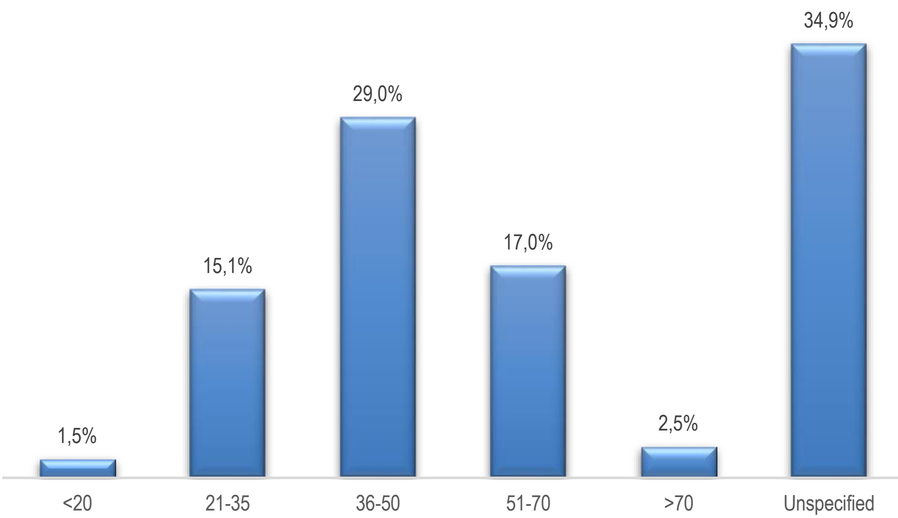
TOP INTERNATIONAL VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN - JUN 2019



% SHARE OF DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN - JUN 2019

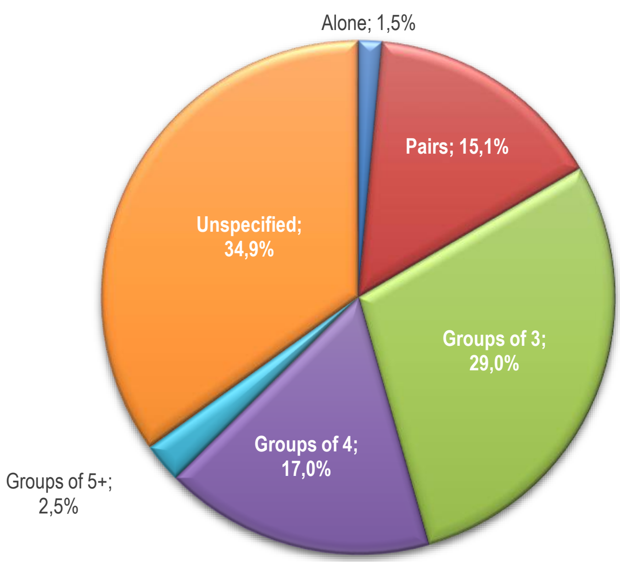


4.2 Age Profile of Visitors

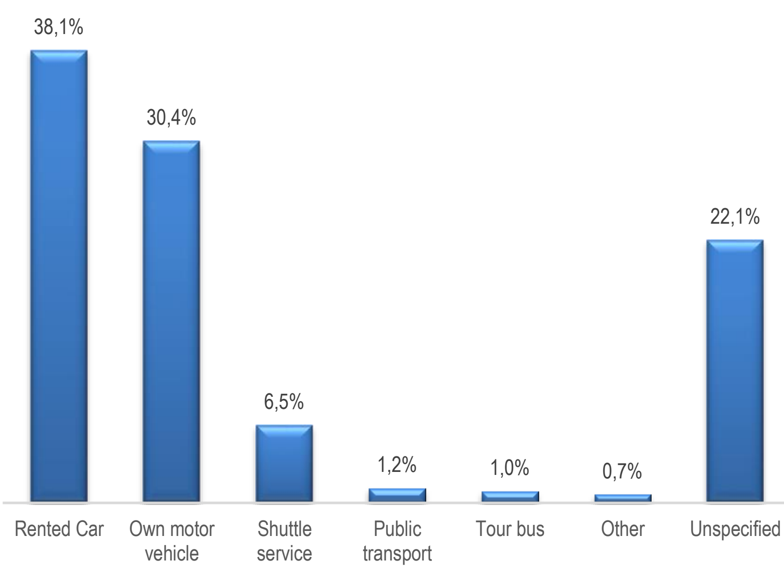


- The leading age group, was between the ages of 36 and 50 years (29,0%). A further 15.1% were between the ages of 21 and 35 years, and 17,0% of respondents were between the ages of 51 and 70 years.
- Group travel was preferred with majority of respondents travelling in pairs (15,1%) and in groups of three or more (48,5%).
- Single travellers accounted for 1,5% of respondents which may be attributed to travel for business or educational purposes.
- Majority of respondents travelled to the region via rented cars (38,1%) or own motor vehicles (30,4%). A small minority travelled via shuttle service (6,5%), public transport (1,2%), and tour bus (1,0%). Other modes of transport (0,7%) include long distance bus, mini bus taxi, metered taxi and motorbike.

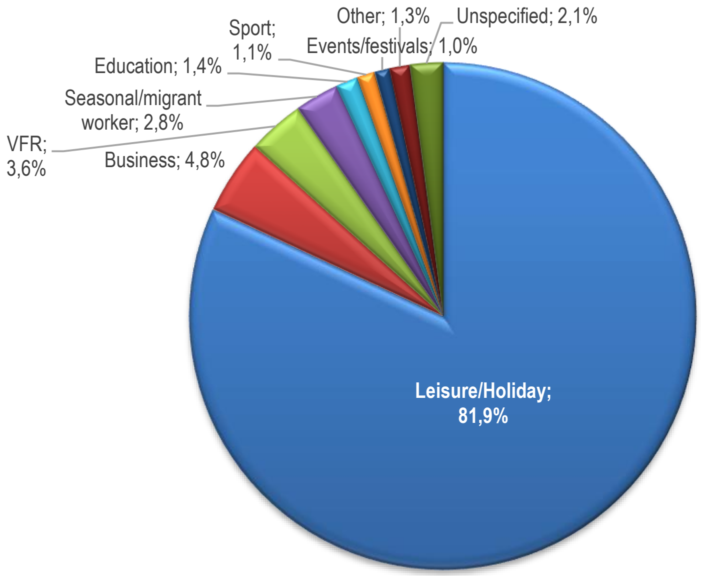
4.3 Group size



4.4 Mode of transport

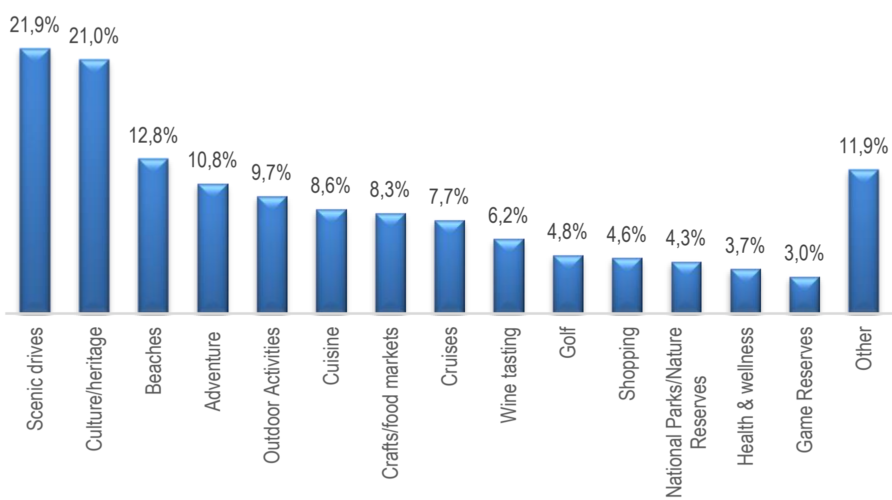


4.5 Main purpose of visit

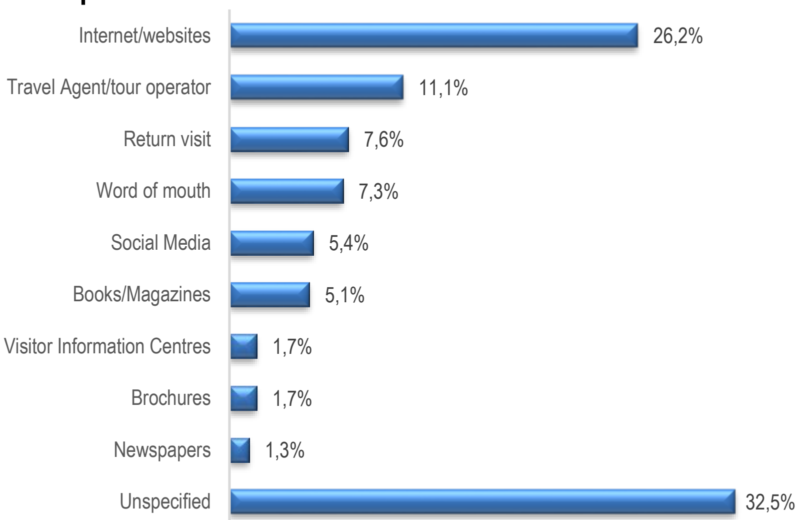


- The most prominent motivating factor for travel to the Cape Garden Route & Klein Karoo was for the purpose of holiday/leisure (81,9%). 'Other' reasons for travel included health & wellness, wedding/honeymoon, and religion.
- Travel for Business (4,8%) and visiting friend/relatives (3,6%) ranked as part of the top 3 reasons for visiting the Cape Garden Route & Klein Karoo.
- Scenic drives (21,9%), Culture/Heritage (21,0%), and Beaches (12,8%) were the top 3 activities undertaken in the region.
- Activities in the 'other' category included Whale watching, Events, Business, Ostriches, Nighlife/clubbing, Birding, Sporting events-participator, Expos/exhibitions, Cycling, Fishing, Gambling, Shark cage diving, Karoo Lamb (Cape Karoo Farms), and Flowers.
- Internet/websites (26,2%), travel agent/tour operator (11,1%), and return visits (7,6%) were the top 3 sources used by visitors to gather information about the region.

4.6 Top activities



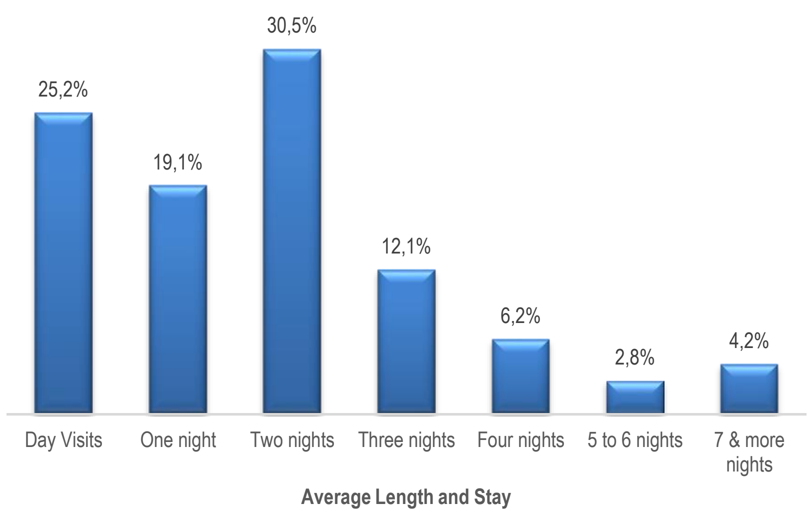
4.7 Top information sources



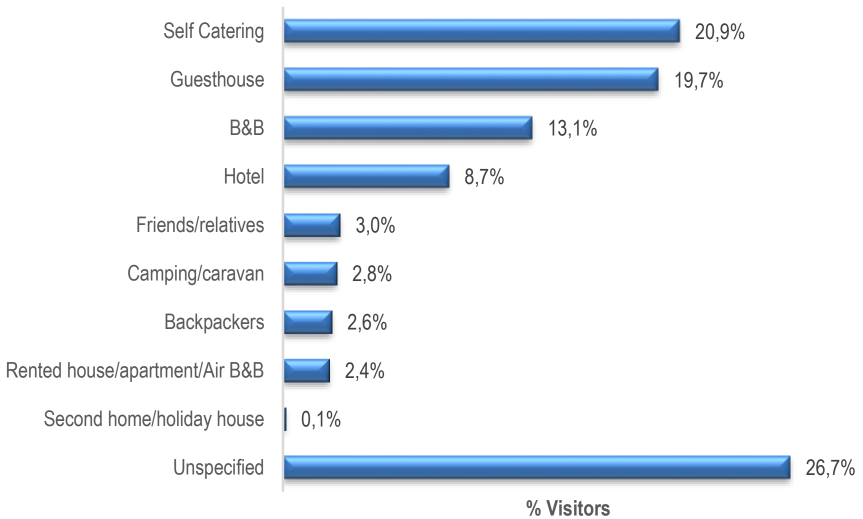
4.8 Overnight stay

- Overnight visitors (78,8%) make up the majority of travellers to the Cape Garden Route & Klein Karoo over the Jan – Jun 2019 period and 25,2% of respondents were day visitors.
- Majority of overnight visitors stayed for two nights (30,5%), one night (19,1%) or three nights (12,1%).
- Respondents indicated their preferred accommodation type to be Self Catering (20,9%), followed by Guesthouse (19,7%), and B&B (13,1%).

4.9 Average Length of Stay



4.10 Accommodation Usage



5. Profile/Snapshot of top overseas and domestic market

OVERVIEW OF OVERSEAS & DOMESTIC VISITOR TRENDS AND PATTERNS, JAN – JUN 2019		
TOURISM INDICATOR	**OVERSEAS**	**DOMESTIC**
Age group	36 – 50 (28,2%)	36 – 50 (30,1%)
	51 – 70 (19,8%)	21 – 35 (13,7%)
	21 – 35 (16,2%)	51 – 70 (13,4%)
Main purpose of visit	Holiday/leisure (82,1%)	Holiday/leisure (81,6%)
	Seasonal/migrant worker (4,9%)	Business (7,9%)
	VFR (3,5%)	VFR (3,8%)
Most common travel group size	Groups of 3 (28,2%)	Groups of 3 (30,1%)
	Groups of 4 (19,8%)	Groups of 2 (13,7%)
Most common length of stay (overnight visitors)	2 nights (41,2%)	2 nights (40,0%)
	3 nights (20,2%)	1 night (38,9%)
Most common mode of transport	Rented car (62,5%)	Own motor vehicle (67,4%)
	Shuttle service (10,6%)	Rented car (5,3%)
Top information sources	Internet (26,3%)	Internet (26,2%)
	Travel agent/ Tour operator (16,5%)	Word of mouth (11,1%)
Average daily spend	-	-
Type of accommodation	Guesthouse (28,3%)	Self Catering (36,9%)
	Self Catering (21,5%)	Guesthouse (22,8%)
Average spend on accommodation	-	-
Top three activities undertaken	Culture/Heritage (23,2%)	Scenic drives (23,9%)
	Scenic drives (20,5%)	Culture/Heritage (18,1%)
	Beaches (16,1%)	Beaches (8,3%)

Notes: Blank cells indicate that the sample was not big enough for a valid statistical interpretation.

6. Profile/Snapshot of top international markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL MARKET, JAN – JUN 2019				
TOURISM INDICATOR	**Germany**	**United Kingdom**	**France**	**Netherlands**
Main purpose of visit	Holiday/leisure (88,0%)	Holiday/leisure (80,7%)	Holiday/leisure (88,5%)	Holiday/leisure (77,1%)
Most common travel group size	-	Groups of 3 (31,6%)	Groups of 3 (33,3%)	Groups of 3 (34,9%)
	-	Groups of 4 (28,1%)	Pairs (24,1%)	Groups of 4 (21,7%)
Most common age group	-	36 – 50 (31,6%)	36 – 50 (33,3%)	36 – 50 (34,9%)
Most common length of stay (overnight visitors)	2 nights (45,2%)	2 nights (40,7%)	2 nights (47,0%)	2 nights (42,1%)
	1 night (17,3%)	1 night (21,2%)	1 night (21,2%)	1 night (18,4%)
Most common mode of transport	Rented car (58,2%)	Rented car (64,6%)	Rented car (66,7%)	Rented car (60,2%)
Top information sources	-	Internet (23,9%)	Internet (31,0%)	Internet (24,1%)
	-	Travel Agent/Tour Operator (22,8%)	Social Media (14,9%)	Travel Agent/Tour Operator (20,5%)
Most common type of accommodation	Guesthouse (32,2%)	Guesthouse (29,2%)	Guesthouse (27,3%)	B&B (30,3%)
Top three activities undertaken	Culture/Heritage (27,7%)	Culture/Heritage (26,0%)	Culture/Heritage (34,5%)	Beaches (30,1%)
	Scenic drives (17,4%)	Scenic drives (21,4%)	Scenic drives (27,6%)	Scenic drives (28,9%)
	Adventure (12,0%)	Adventure (14,0%)	Outdoor Activities (18,4%)	Outdoor Activities (24,1%)

Notes: Blank cells indicate that the sample was not big enough for a valid statistical interpretation.

7. Profile/Snapshot of top domestic markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC MARKET, JAN – JUN 2019		
TOURISM INDICATOR	**Western Cape**	**Gauteng**
Main purpose of visit	Holiday/leisure (63,7%)	Holiday/leisure (77,5%)
	Business (12,5%)	Business (7,9%)
	VFR (7,1%)	VFR (7,9%)
% Day Visitors	61,4%	32,6%
% Overnight Visitors	38,6%	67,4%
Most common length of stay (overnight visitors)	2 nights (38,6%)	2 nights (41,7%)
	1 night (36,8%)	3 nights (18,3%)
Most common mode of transport	-	Own motor vehicle (73,0%)
Top information sources	-	Return visit (34,8%)
	-	Word of Mouth (12,4%)
	-	Books/Magazines (12,4%)
Most common type of accommodation	Guesthouse (28,1%)	Self Catering (36,7%)
Top three activities undertaken	Scenic drives (24,1%)	Scenic drives (46,1%)
	Outdoor Activities (10,5%)	Beaches (22,5%)
	Crafts/food markets (5,4%)	Cruises (18,0%)

Notes: Blank cells indicate that the sample was not big enough for a valid statistical interpretation.

8. Cape Garden Route & Klein Karoo Towns

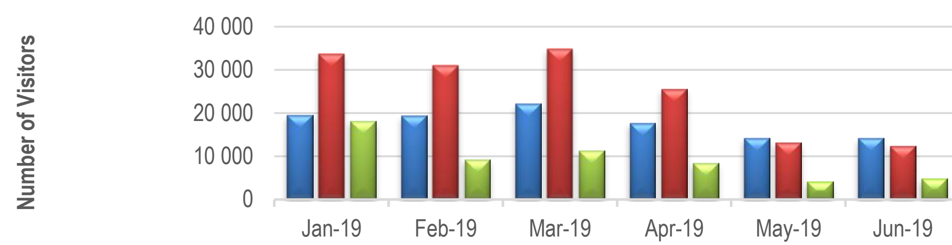
OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, JAN – JUN 2019						
TOURISM INDICATOR	**Knysna**	**George**	**Uniondale**	**Oudshoorn**	**Plettenberg Bay**	**Wilderness**
% Share overseas	74,3%	33,9%	8,8%	49,4%	84,3%	74,3%
% Share domestic	25,7%	66,1%	91,2%	50,6%	15,7%	25,7%
Top international markets	Germany (25,9%)	Germany (39,7%)	Germany (42,9%)	Germany (36,0%)	Netherlands (11,5%)	Germany (46,7%)
	United Kingdom (24,1%)	United Kingdom (16,7%)	France (35,7%)	United Kingdom (30,2%)	USA (7,1%)	United Kingdom (19,3%)
	France (10,2%)	USA (9,0%)	Netherlands (14,3%)	France (7,1%)	Spain (7,1%)	France (5,8%)
Top domestic markets	Western Cape (34,7%)	Western Cape (77,6%)	Western Cape (47,6%)	-	KZN (20,6%)	Western Cape (31,7%)
	Gauteng (27,4%)	Gauteng (14,5%)	Eastern Cape (19,3%)	-	-	Northern Cape (14,2%)
Main purpose of visit	Holiday/leisure (76,4%)	Holiday/leisure (76,1%)	Holiday/leisure (70,4%)	Holiday/leisure (96,7%)	Holiday/leisure (52,5%)	Holiday/leisure (89,3%)
	Seasonal/migrant worker (17,6%)	Education (6,1%)	Business (18,2%)	Business (3,0%)	VFR (14,7%)	VFR (3,9%)
Most common travel group size	Groups of 3 (43,6%)	-	-	Groups of 3 (49,3%)	Groups of 3 (37,3%)	-
	Groups of 4 (33,9%)	-	-	Groups of 4 (30,1%)	Groups of 2 (33,6%)	-
Most common length of stay	2 nights (35,7%)	2 nights (41,3%)	1 night (61,8%)	2 nights (49,3%)	2 nights (33,6%)	-
	3 nights (20,6%)	1 nights (20,0%) and 7+ nights (20,0%)	2 nights (29,2%)	1 nights (36,7%)	3 nights (30,4%)	-
Most common mode of transport	Rented Car (46,1%)	-	Own vehicle (86,8%)	Rented Car (48,5%)	Rented Car (53,5%)	-
	Shuttle service (28,5%)	-	Rented Car (11,9%)	Own vehicle (45,8%)	Own vehicle (15,7%)	-
Top information sources	Travel agent/ tour operator (24,1%)	-	Internet (23,9%)	Internet (44,7%)	Books/magazines (38,2%)	-
	Internet (23,6%)	-	Word of mouth (27,0%)	Travel agent/ tour operator (19,9%)	Internet (29,5%)	-
Average daily spend	R500 – R1000 (56,1%)	-	R501 – R1000 (50,9%)	-	R501 – R1000 (46,1%)	-
Type of accommodation	Self Catering (32,0%)	Hotel (33,3%)	Guesthouse (47,2%)	Self Catering (33,2%)	B&B (18,4%)	-
	Guesthouse (22,8%)	Friends/relatives (21,3%)	B&B (29,2%)	Guesthouse (26,4%)	Guesthouse (16,6%)	-
Average spend on accommodation	R501 – R1000 (51,8%)	R501 – R1000	R201 – R500 (44,9%)	-	R501 – R1000 (38,7%)	R1001 – R2000 (34,5%)
Top three activities undertaken	Scenic drives (47,4%)	Scenic drives (27,0%)	Scenic drives (61,6%)	Culture/Heritage (13,7%)	Beaches (54,4%)	Adventure (12,0%)
	Cruises (32,0%)	Golf (11,7%)	Outdoor Activities (13,2%)	Adventure (4,2%)	Cuisine (34,6%)	Beaches (10,5%)
	Beaches (30,4%)	Culture/Heritage (10,9%)	National Parks (10,7%)	Scenic drives (3,9%)	Outdoor Activities (31,8%)	National Parks (9,4%)

Notes: Blank cells indicate that the sample was not big enough for a valid statistical interpretation.

9. Cape Garden Route & Klein Karoo Attractions

- The Cape Garden Route & Klein Karoo attractions received a total of 313 716 visitors over the period January to June 2019.
- Visitor numbers show an overall decrease of 7,6% over the same period in 2018. However the period ended off on a positive note, as June 2019 saw an increase of 22,2% in visitors compared to June 2018.
- Over the Jan – Jun 2019 period, January saw the highest recorded number of visitors (71 357 visitors) to the region followed by March with 68 298 visitors and February with 59 613 visitors.
- Tsitsikamma National Park was the most visited tourist attraction in the region with a total of 150 575 visitors over the period January to June 2019.
- Cango Caves was the most visited tourist attraction in May 2019 with 14 200 visitors as well as June 2019 with 14 147 visitors.
- Wilderness National Park received its highest total of visitors in January 2019 with 18 200 visitors.

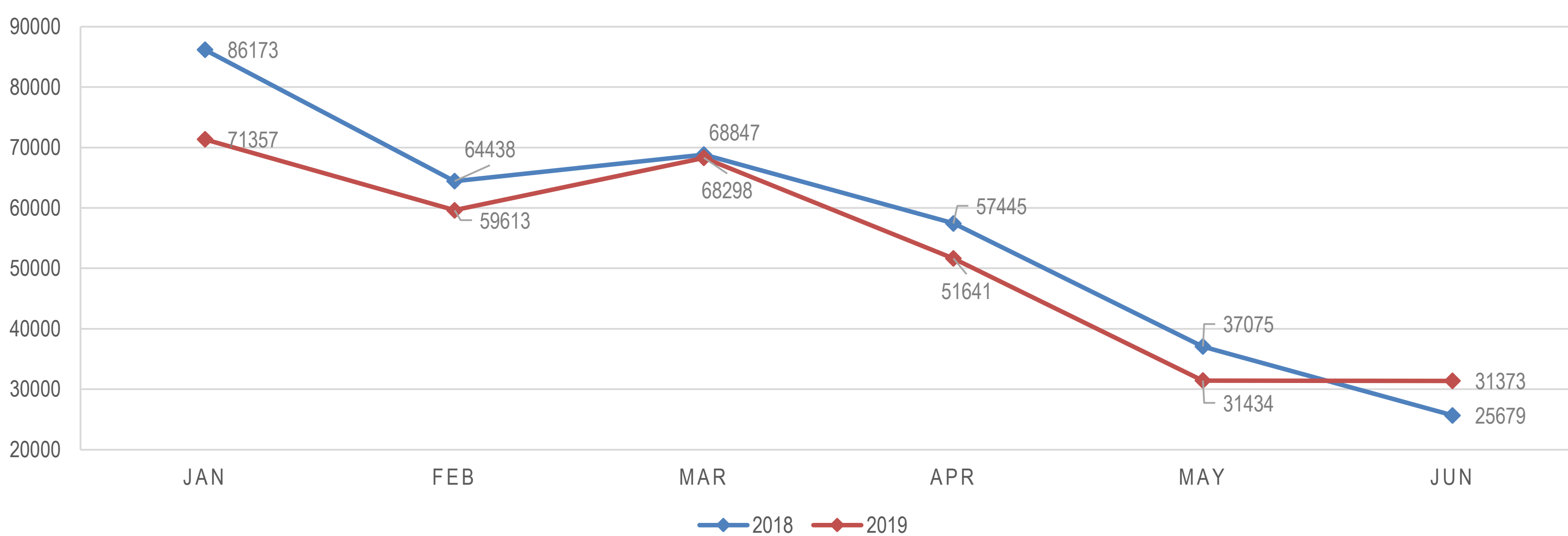
TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN - JUN 2019



	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19
Cango Caves	19 492	19 366	22 146	17 694	14 200	14 147
Tsitsikamma National Park	33 665	31 010	34 850	25 561	13 100	12 389
Wildnerness National Park	18 200	9 237	11 302	8 386	4 134	4 837

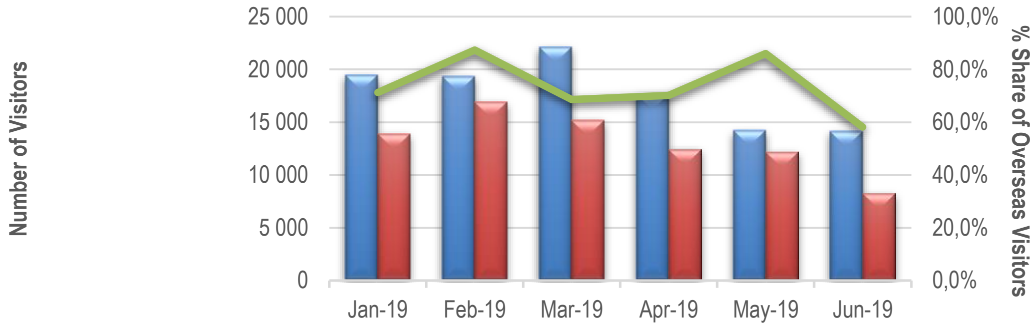
Cango Caves Tsitsikamma National Park Wildnerness National Park

TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN-JUN 2019



Source: SANParks 2019, Cango Caves 2019

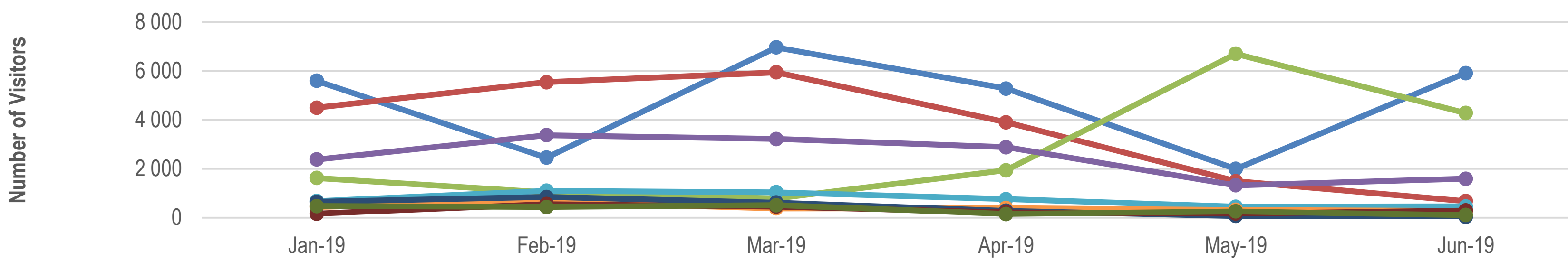
TOTAL NUMBER OF VISITORS TO THE CANGO CAVES: JAN - JUN 2019



	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19
Total Visitors	19 492	19 366	22 146	17 694	14 200	14 147
Overseas Visitors	13 901	16 912	15 185	12 419	12 211	8 236
% Share of Overseas Visitors	71,3%	87,3%	68,6%	70,2%	86,0%	58,2%

- The Cango Caves welcomed a total of 107 045 visitors over the period January to June 2019. The highest recorded number of visitors occurred in March with 22 146 patrons visiting the attraction.
- Overseas visitor numbers were the highest in November 2018 with 24 198 international patrons visiting the Cango Caves.
- South Africa, Germany, and India were the top 3 source markets over the period January to June 2019.
- March 2019 saw the highest number of visitors from Germany with 5943 German travellers visiting the attraction.
- May 2019 saw the highest number of visitors from India with 6700 Indian travellers visiting the attraction.
- South African visitor numbers were highest in March and June, which coincides with the school holiday breaks.

CANGO CAVES VISITOR DISTRIBUTION BY TOP SOURCE MARKETS: JAN - JUN 2019



	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19
South Africa	5 591	2 454	6 961	5 275	1 989	5 911
Germany	4497	5540	5943	3896	1486	672
India	1621	1038	783	1934	6700	4280
United Kingdom	2378	3370	3216	2877	1321	1589
Netherlands	675	1098	1033	754	442	455
United States	430	647	377	388	315	280
Nordics	641	840	610	276	68	28
Asia	161	550	453	218	168	287
France	470	430	506	145	252	104

Source: Cango Caves 2019

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
- Oudtshoorn Tourism
- Pacalsdorp Tourism
- Plettenberg Bay Tourism
- Uniondale 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

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