



Cape Karoo Regional Trends

WESGRO
cape town & western cape
research

January to June 2019

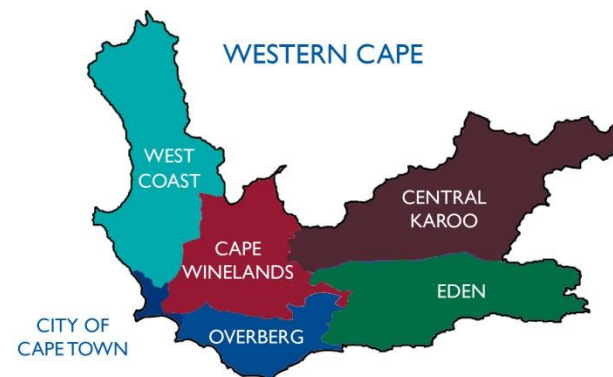
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1. Methodology

- This report provides an overview of the tourism trends and patterns in the Cape 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 December 2018, a total of **471** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Karoo. The participating Tourism Offices were:

- Laingsburg (435)
- Beaufort West (36)



3. Executive Summary

- Visitor surveys conducted between January and December 2018 reflected a high number of domestic visitors with 91,3% of all visitors to the Cape Karoo originating from South Africa. Overseas visitors who traveled to the Cape Karoo made up 8,7% of all visitors surveyed.
- The Western Cape ranked as the top domestic province to the region with 43,0% of domestic travelers originating from the Western Cape. Visitors originating from Gauteng made up 25,8% of domestic visitors and 7,9% of domestic travelers originated from Kwazulu-Natal.
- The top international markets to the region were United Kingdom (26,8%), USA (12,2%) and France (9,8%).
- The age profile of visitors were predominantly in the 21 – 35 (29,1%), 36 – 50 (31,4%) and 51 – 70 (32,1%) age categories.
- Group travel was preferred with 30,1% of visitors indicating that they were travelling in pairs and a further 21,4% indicated that they were traveling in groups of five or more.
- Visitors to the Cape Karoo chose own motor vehicle (79,4%) and rented car (10,8%) as their preferred choice of transport to the region.
- 76,2% of visitors to the Cape Karoo indicated holiday/leisure as the main purpose of their journey, 11,7% traveled for business and 7,0% were visiting friends and family.
- Culture/heritage was considered the main activity for 59,0% of travelers. In addition visitors cited Crafts/food markets (25,9%) and Karoo Lamb (19,3%) amongst the top activities undertaken in the Cape Karoo.
- Day visitors accounted for 68,2% of travelers to the region and 31,8% of visitors stayed overnight.
- Overnight visitors spent an average of 1 night (9,8%) or 2 nights (14,0%) in the Cape Karoo. A further 3,6% indicated to have spent 7 nights or more in the region.
- 38,6% of visitors indicated an average spend of less than R200 per day and 24,6% indicated spending between R201 and R500 per day in the region.
- Word of mouth (44,8%), Internet (15,9%), and Return Visits (14,4%) were the two main sources used by visitors to obtain information about the region.
- The Cape Karoo National Park received 15 675 visitors over the period January to June 2019.

Cape Karoo Visitor Trends

Jan - Jun 2019

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tourism, trade & investment

0%

share of overseas visitors	8.7%
share of domestic visitors	91.3%
share of overnight visitors	31.8%
share of day visitors	68.2%

Top 3

international markets

United Kingdom (26.8%)
USA (12.2%)
France (9.8%)

Top 3

domestic markets

Western Cape (43%)
Gauteng (25.8%)
KwaZulu-Natal (7.9%)

Main purpose of visit

 Holiday/Leisure	76.2%
 Business	11.7%
 VFR	7%



Travel group size
Pairs 30.1%
Five+ 21.4%

Age group

36-50 (31.4%)
51-70 (32.1%)

Length of stay

1 night 9.8%
2 nights 14%
7+ nights 3.6%



Transport

Rented car — 10.8%
Own vehicle — 79.4%

Top information sources

Internet.....15.9%
Word of mouth.....44.8%

Average daily spend

R0 – R200 (38.6%)



Top 3

activities in the Cape Karoo



Top accommodation

Guesthouse 22.7%
Hotel 16%

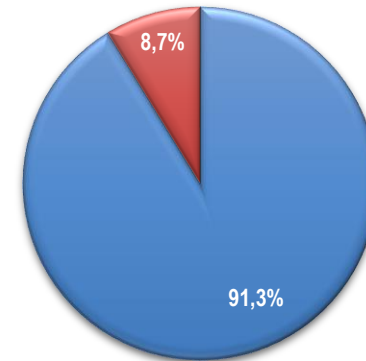
Culture/Heritage (59%)
Crafts/food markets (25.9%)
Karoo Lamb (19.3%)

4. Cape Karoo Visitor Trends & Patterns

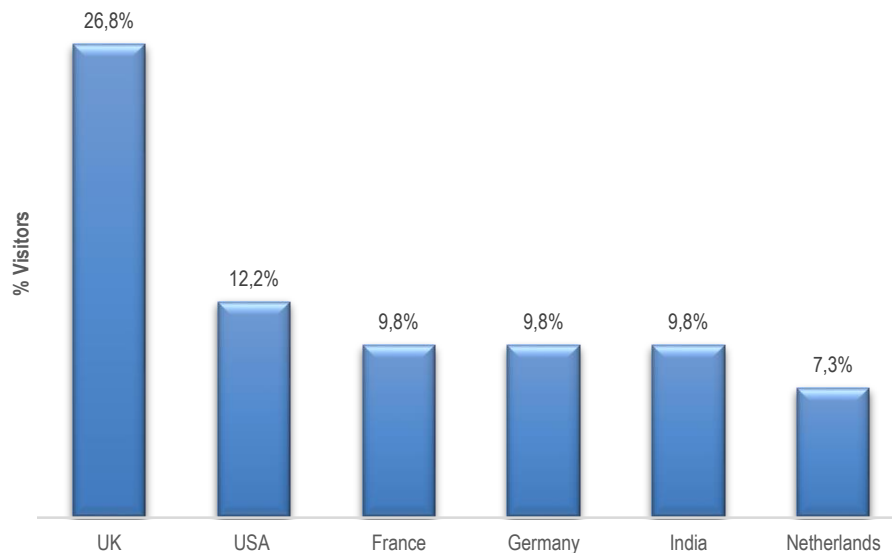
4.1 Origin of Visitors

- Domestic visitors made up 91,3% of travellers to the Cape Karoo over the Jan – Jun 2019 period.
- The Western Cape was the leading domestic market to the region followed by Gauteng and Kwazulu-Natal.
- On the international side, the United Kingdom, USA, and France ranked as the region's top 3 overseas market, respectively.
- In addition, the Cape Karoo received a small percentage share of international visitors from Australia, Austria, Belgium, Canada, Kenya, Lesotho, Namibia, Swaziland, Switzerland, and Tanzania.

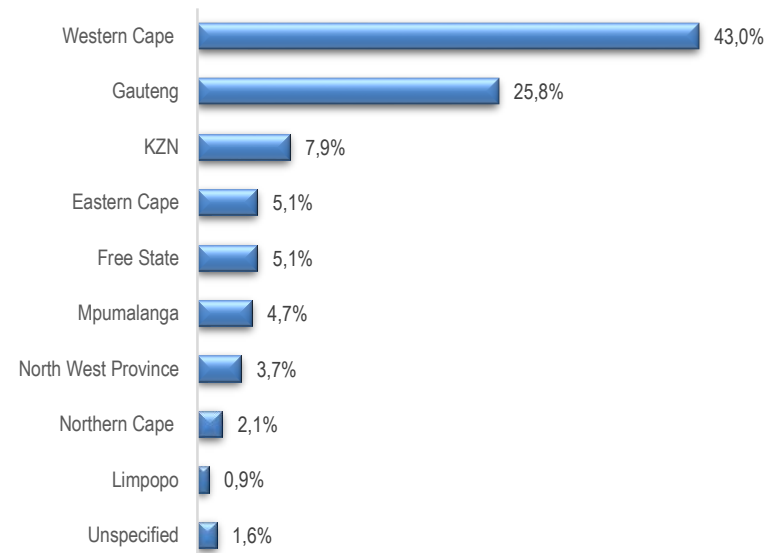
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE KAROO, JAN - JUN 2019



TOP INTERNATIONAL VISITORS TO THE CAPE KAROO, JAN - JUN 2019

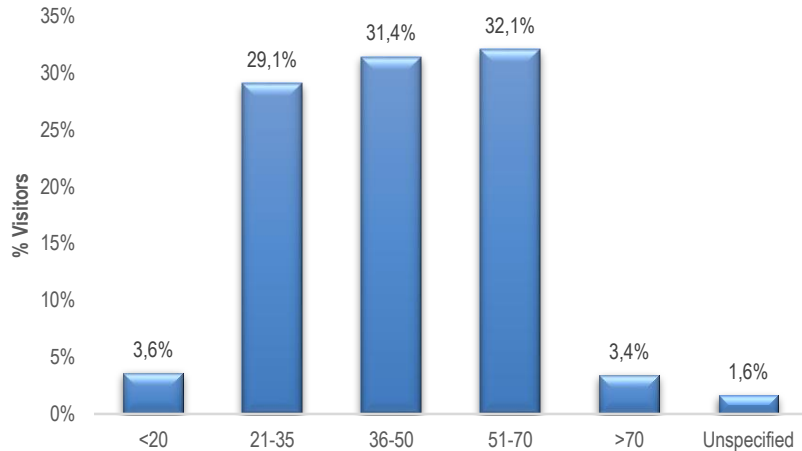


% SHARE OF DOMESTIC VISITORS TO THE CAPE KAROO, JAN - JUN 2019



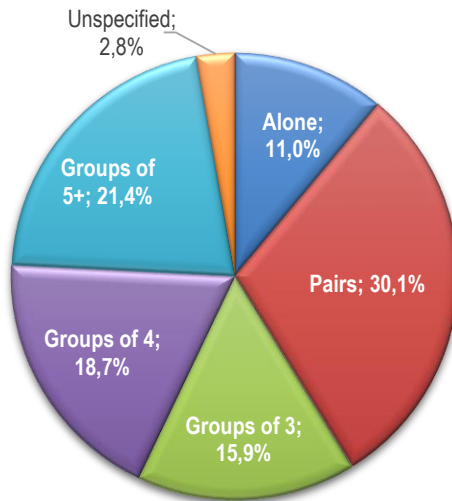
4. Cape Karoo Visitor Trends and Patterns

4.2 Age Profile of Visitors

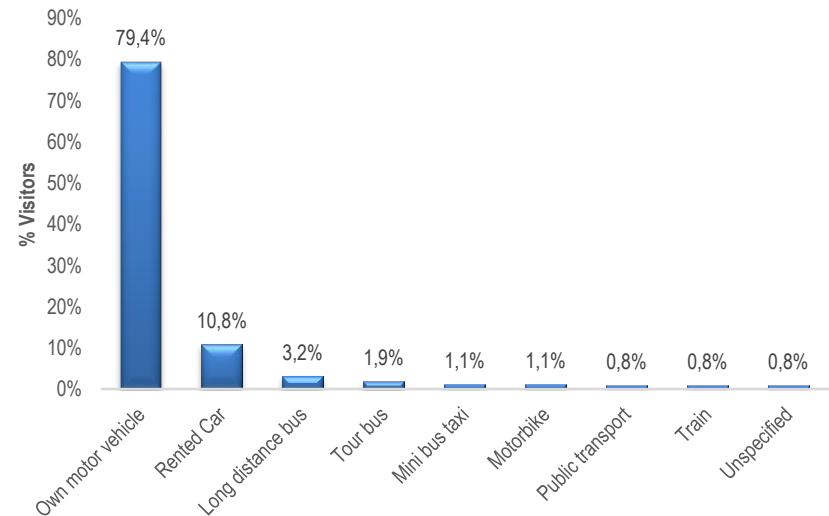


- The majority of visitors to the region were between the ages of 21 and 70 years. The leading age group (32,1%) being between the ages of 51 and 70 years and a significant number were between the ages of 21 to 35 years (29,1%) and 36 to 50 years (31,4%).
- Group travel was preferred with majority of respondents travelling in pairs (30,1%) and in groups of three or more (56,1%).
- Majority of respondents travelled to the region via own motor vehicles (79,4%) or rented cars (10,8%) and a small minority travelled via long distance bus (3,2%), tour bus (1,9%), mini bus taxi (1,1%), motorbike (1,1%), public transport (0,8%), and train (0,8%).

4.3 Travel Group Size

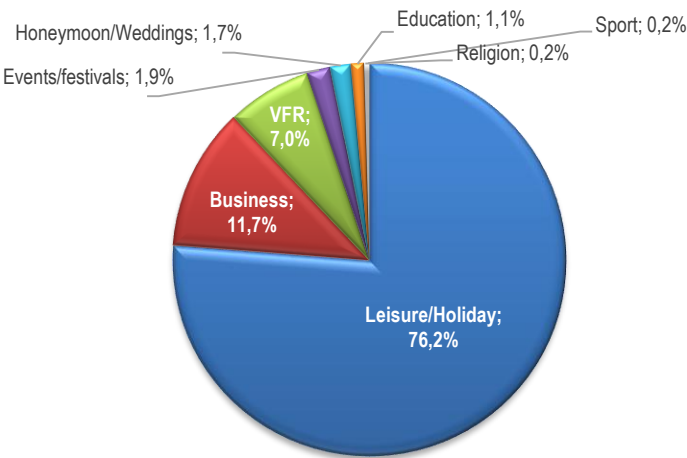


4.4 Mode of Transport



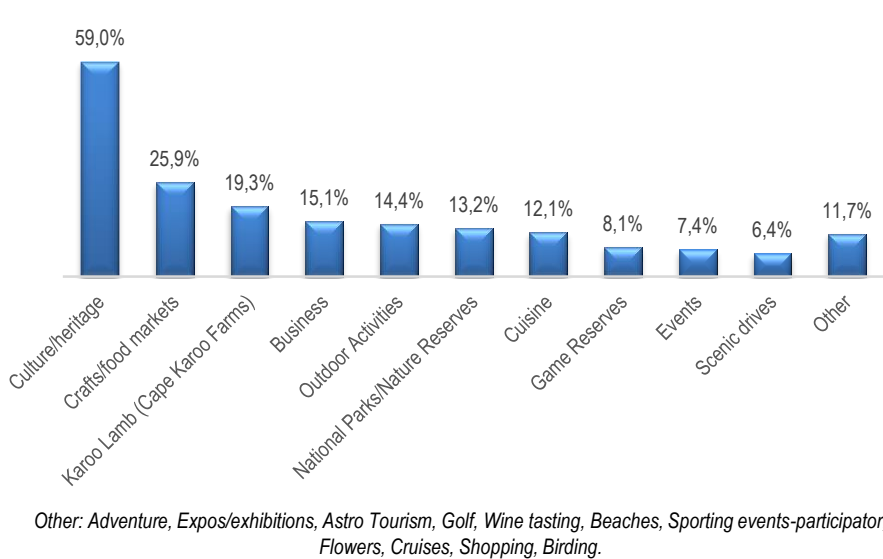
4. Cape Karoo Visitor Trends and Patterns

4.5 Main Purpose of Visit

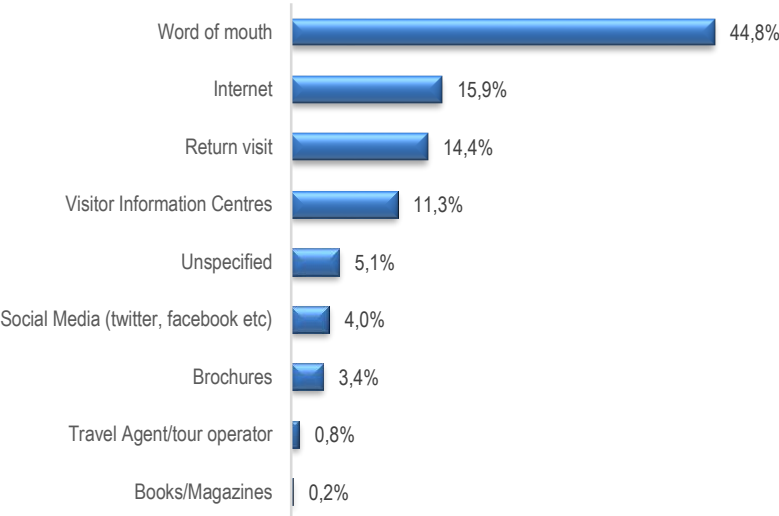


- The most prominent motivating factor for travel to the Cape Karoo was for the purpose of holiday/leisure (72,2%).
- Business travel had an 11,7% share of the overall reasons for travel to the Cape Karoo
- Visiting friends/relatives (VFR) ranked as part of the top 3 reasons for visiting the Cape Karoo with 7,0% of respondents indicating this as the main purpose of their visit.
- Culture/heritage, and Crafts/food markets, were the top 2 activities undertaken in the region, with 59,0% of respondents indicating to have engaged in culture/heritage activities, 25,9% engaged in activities related to crafts/food markets.
- Sampling the distinct flavour of Karoo Lamb continues to grow as a niche activity in the region, with 9,3% indicating that they engaged in Karoo Lamb activities.

4.6 Top Activities



4.7 Top Information Sources

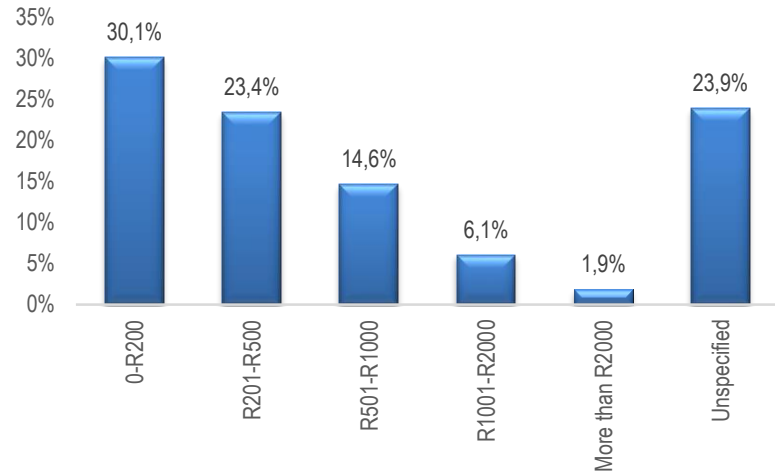


4. Cape Karoo Visitor Trends and Patterns

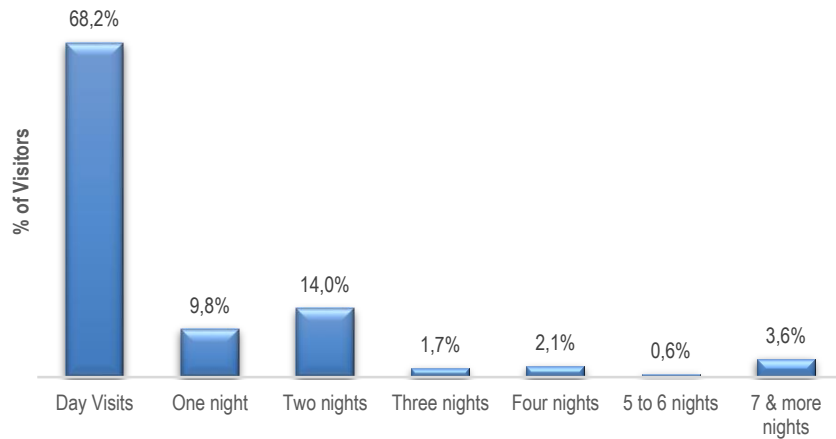
4.8 Overnight Stay



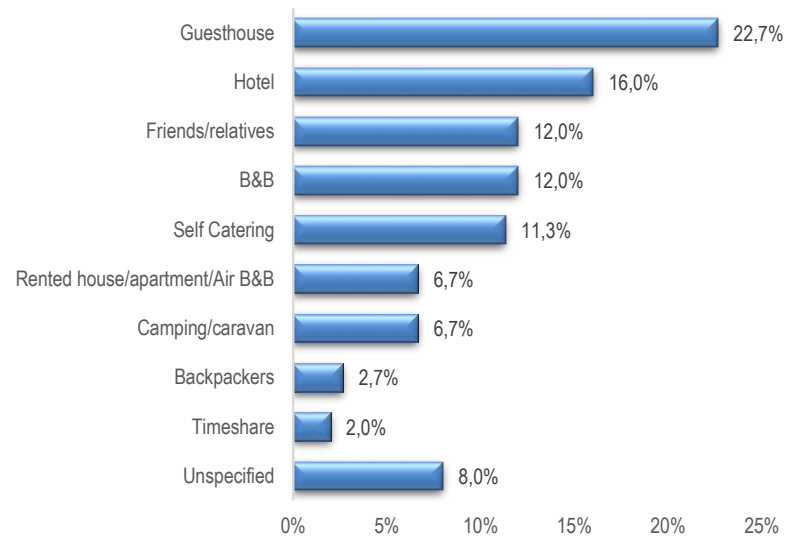
4.9 Average Daily Spend



4.10 Average Length of Stay

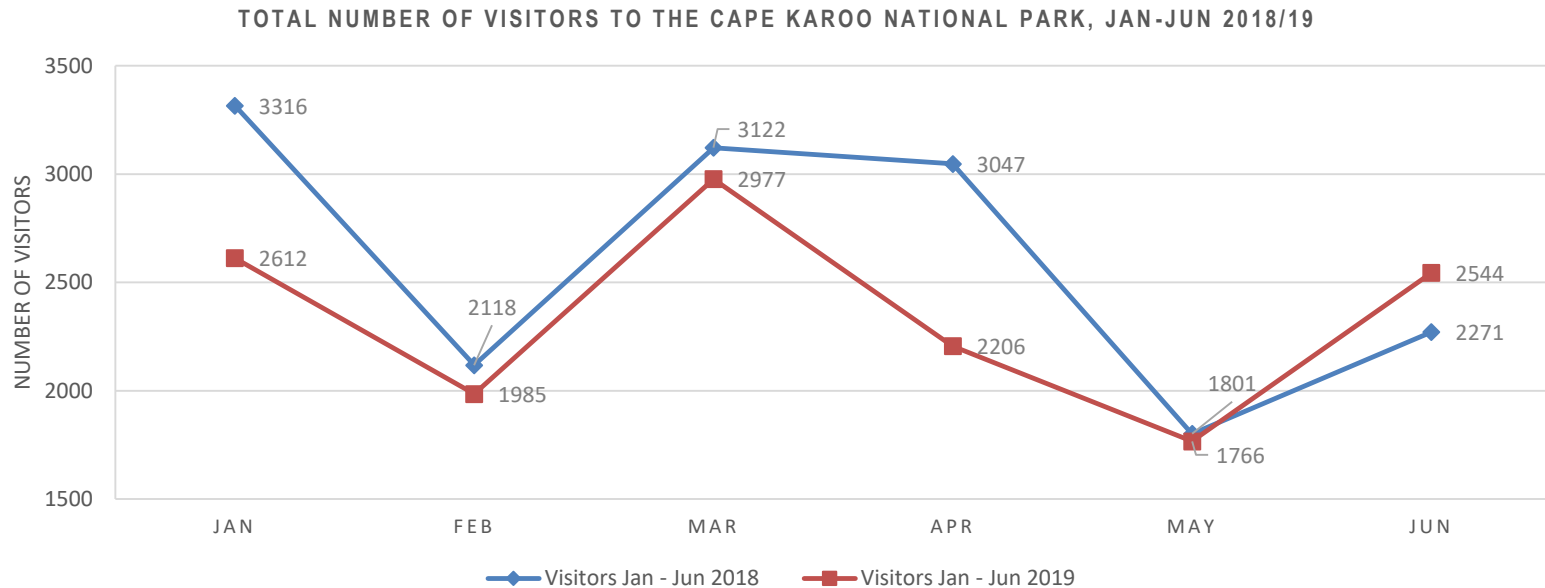


4.11 Accommodation Types



5. Performance of Cape Karoo Attractions

- The Cape Karoo National Park received 15 675 visitors over the period January to June 2019.
- Visitor numbers show an overall decline of 10,1% over the same period in 2018.
- Over the Jan – Jun 2019 period, January, March, and June saw the highest recorded visitor numbers, which may be due to high season in January, and annual Karoo festivals such as the Klein Karoo Arts Festival and the Klein Karoo Food Festival in March and April respectively as well as the in June.



Source: SANParks 2019

6. Cape Karoo Trends and Patterns by Town

OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, JAN – DEC 2018		
TOURISM INDICATOR	LAINGSBURG	BEAUFORT WEST
% Share overseas	6,2%	38,9%
% Share domestic	93,8%	61,1%
% Share of overnight visitors	27,6%	83,3%
% Share of day visitors	72,4%	16,7%
Top international markets	United Kingdom (37,0%)	France (28,6%)
	USA (14,8%)	Netherlands (21,4%)
	India (14,8%)	-
Top domestic markets	Western Cape (42,4%)	Western Cape (54,5%)
	Gauteng (26,0%)	Gauteng (22,7%)
Main purpose of visit	Holiday/Leisure (75,6%)	Holiday/Leisure (83,3%)
	Business (12,2%)	VFR (5,6%) & Business (5,6%)
Age profile of visitors	51 – 70 (31,3%)	51 – 70 (41,7%)
	36 – 50 (31,3%)	36 – 50 (33,3%)
Most common travel group size	Pairs (29,0%)	Pairs (44,4%)
Most common length of stay (Overnight Visitors)	1 night (27,5%)	1 night (43,3%)
	2 nights (47,5%)	2 nights (30,0%)
Most common mode of transport	Own motor vehicle 80,9%)	Own motor vehicle (61,1%)
Top information source	Word of mouth (46,7%)	Internet (44,4%)
	Visitor Information Centre (11,0%)	Word of mouth (22,2%)
Average daily spend	0 – R200 (41,1%)	R501 – R1000 (38,9%)
Top three activities undertaken in the Cape Karoo	Culture/heritage (61,8%)	National Parks/Nature (44,4%)
	Crafts/food markets (27,4%)	Scenic drives (30,6%)
	Karoo Lamb (19,1%)	Culture/heritage (25,0%)

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

7. Trends and Patterns by Top Domestic Source Markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC SOURCE MARKET FOR THE CAPE KAROO, JAN – DEC 2018		
TOURISM INDICATOR	Western Cape	Gauteng
% Share overnight visitors	37,3%	25,2%
% Share day visitors	62,7%	74,8%
Most common length of stay (Overnight Visitors)	Two nights (55,1%)	One night (39,3%)
Age profile of visitors	36 – 50 (36,2%)	51 – 70 (39,6%)
	21 – 35 (31,4%)	36 – 50 (30,6%)
Main purpose of visit	Leisure (67,6%)	Leisure (82,0%)
Most common travel group size	Pairs (27,6%)	Groups of 3 (28,8%)
	Groups of 5+ (23,2%)	Groups of 4 (25,2%)
Mode of transport	Own motor vehicle (83,2%)	Own motor vehicle (71,2%)
Top information sources	Word of mouth (38,4%)	Word of mouth (53,2%)
	Internet (20,0%)	Return Visit (17,1%)
	Return visit (16,2%)	Visitor Information Centres (14,4%)
Average daily spend	0 – R200 (40,0%)	0 – R200 (45,9%)
	R201 – R500 (31,4%)	-
Top three activities undertaken in the Cape Karoo	Culture/heritage (54,1%)	Culture/heritage (64,9%)
	Crafts/food markets (25,4%)	Crafts/food markets (26,1%)
	Business (25,4%)	Karoo Lamb (21,6%)

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

8. Acknowledgements

Acknowledgements and many thanks go to the following tourism offices 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 Karoo:

- *Beaufort West Tourism*
- *Laingsburg Tourism*

The participating attractions in the Cape Karoo:

- *Karoo National Park*

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