



Cape Garden Route & Klein Karoo Visitor Trends

Wesgro
cape town & western cape
research

January – June 2021

Contents

1. Methodology
2. Participation and Sample size
3. Executive Summary
4. Cape Garden Route & Klein Karoo Visitor Trends & Patterns
 - 4.1. Origin of visitors
 - 4.2. Average daily spend
 - 4.3. Group size
 - 4.4. Mode of transport
 - 4.5. Main purpose of visit
 - 4.6. Top activities
 - 4.7. Top information sources
 - 4.8. Overnight stay
 - 4.9. Average length of stay
 - 4.10. Accommodation usage
5. Cape Garden Route & Klein Karoo Attractions
6. George Airport Passenger Movement
7. Acknowledgements

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.

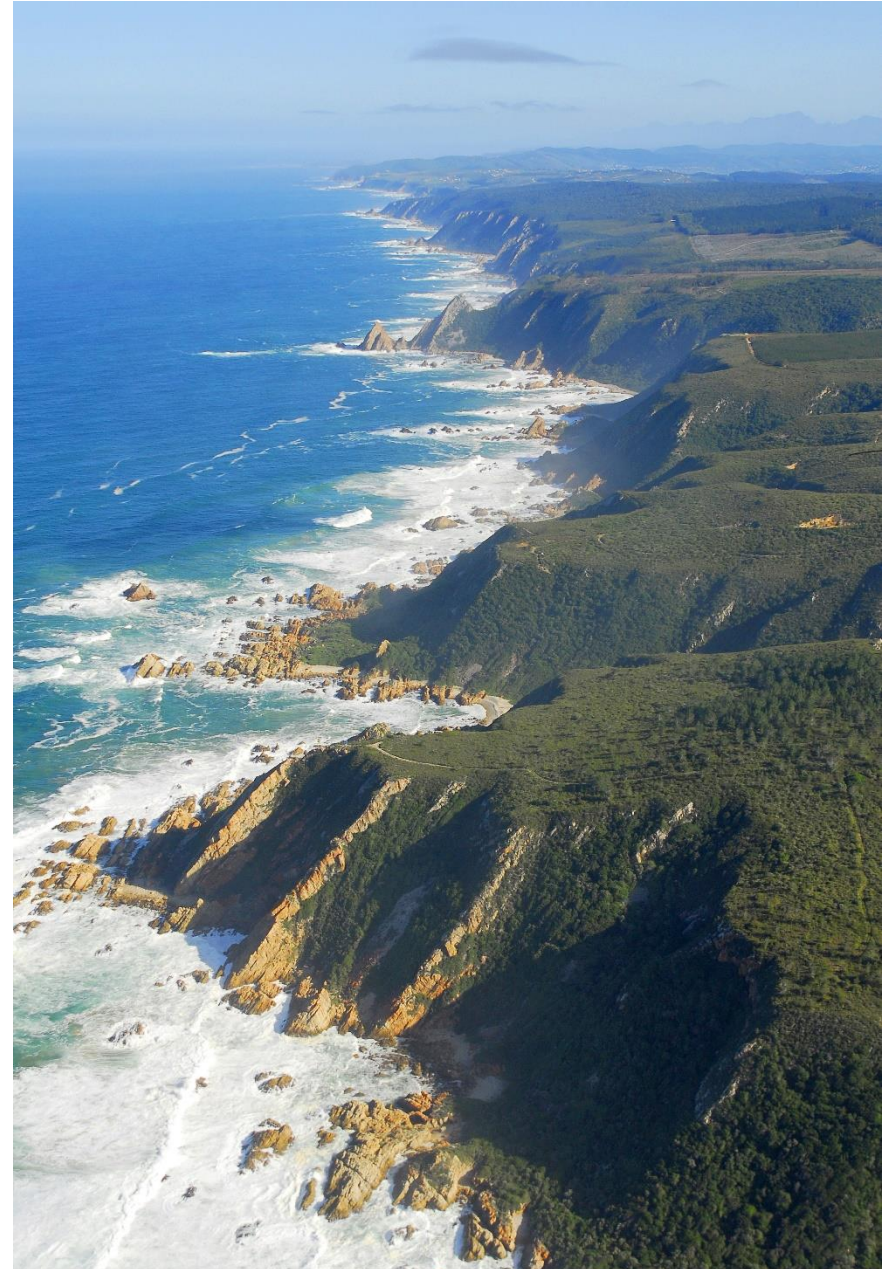
2. Participation and sample size

Between January and June 2021, a total of **204** responses to the regional visitor tracking survey was received from the George Tourism Office.



3. Executive Summary

- Stretching from Witsand to Plettenberg Bay, Oudtshoorn Calitzdorp and Ladismith on the world renowned Route 62, the Garden Route and Klein Karoo is a place of immense natural beauty; offering an abundance of adventure, world class golf courses and award winning dining experiences.
- The COVID-19 pandemic has undoubtedly had a devastating impact on the tourism economy. On 15 March 2020, the South African Government declared a national state of disaster in response to the coronavirus pandemic. A nationwide lockdown then came into effect on 26 March 2020, resulting in a complete standstill of all tourism activity until 31 May 2020. In line with government's risk adjusted strategy, limited tourism activity was introduced as of 1 June 2020.
- The region is slowly recovering, visitors to the participating Cape Garden Route and Klein Karoo attractions decreased by 24,5% going from a combined total of 174 492 visitors between January and June 2020 to 131 805 over the same period in 2021. All attractions in the region were closed throughout quarter two of 2020 due to the nationwide lockdown.
- During the first half of 2021, January saw the highest recorded number of visitors (37 537 visitors) to the region followed by April with 32 069 visitors and March with 21 404 visitors.
- Tsitsikamma National Park was the most visited tourist attraction in the region with a total of 55 365 visitors over the period January to June 2021. Wilderness National Park followed with a total of 41 399 visitors.
- The Cango Caves welcomed a total of 17 809 visitors over the period January to June 2021. The highest recorded number of visitors occurred in April with 5 417 patrons visiting the attraction.
- Overseas visitor numbers were significantly lower than previous years due to COVID related travel restrictions. Germany, USA and France were the top three international source markets who visited the attraction, although the numbers were small.
- George Airport reached its highest share of domestic arrivals at 28 789 passengers in April 2021, and an 87% recovery rate in passenger movement from its 2019 figure.
- Passenger movement (arrivals and departures) through George Airport reached just over a quarter of a million in the first half of 2021, a 63% recovery rate on its 2019 figure.

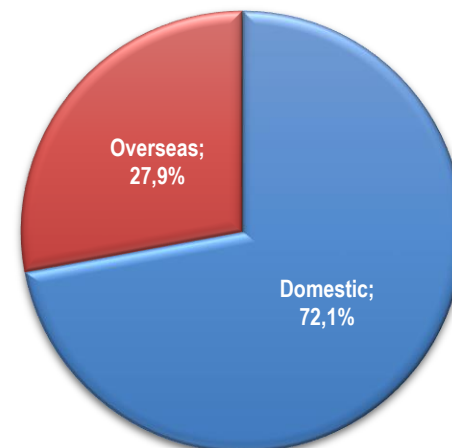


4. Cape Garden Route & Klein Karoo Trends & Patterns

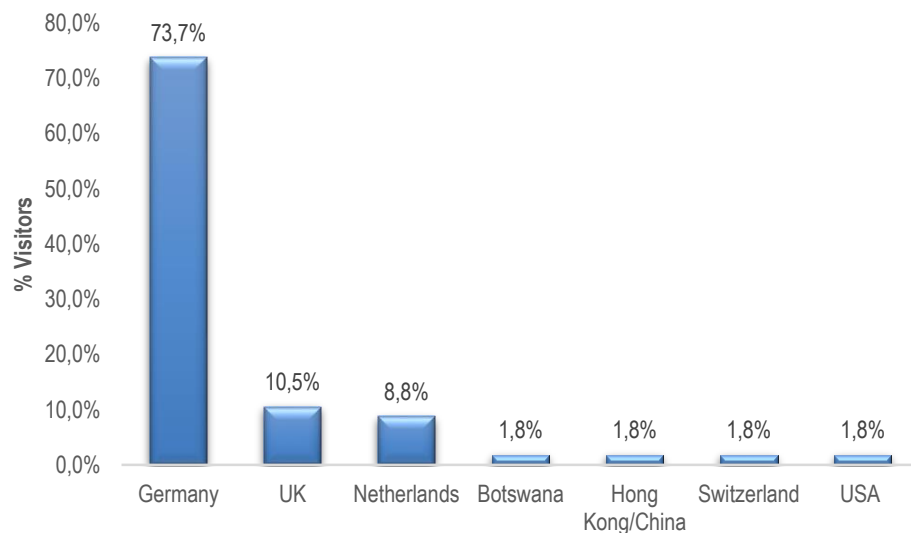
4.1. Origin of visitors

- Domestic visitors made up 72,1% of travellers to the Cape Garden Route & Klein Karoo in 2021, likely due to international travel restrictions brought on by the COVID-19 pandemic.
- Germany ranked as the region's top international market followed by traditional markets such as the United Kingdom, and Netherlands.
- Over the period January to June 2021, the largest share of domestic travellers to the region originated from the Western Cape, which indicates that the Garden Route & Klein Karoo is a popular destination for locals in the province. Gauteng and Eastern Cape were the other popular source provinces to the region.

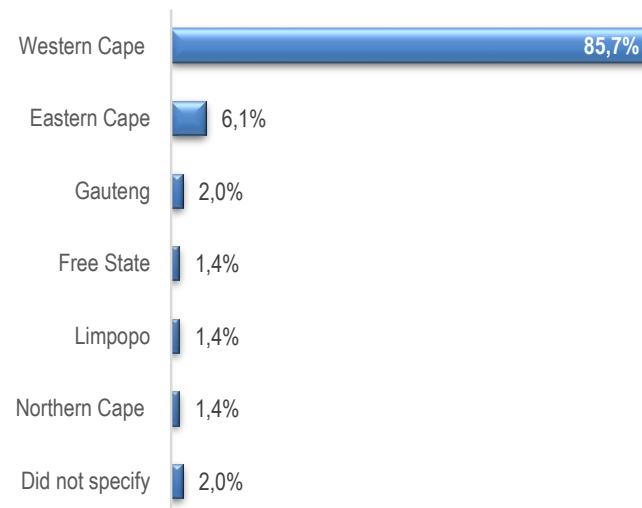
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN-JUN 2021



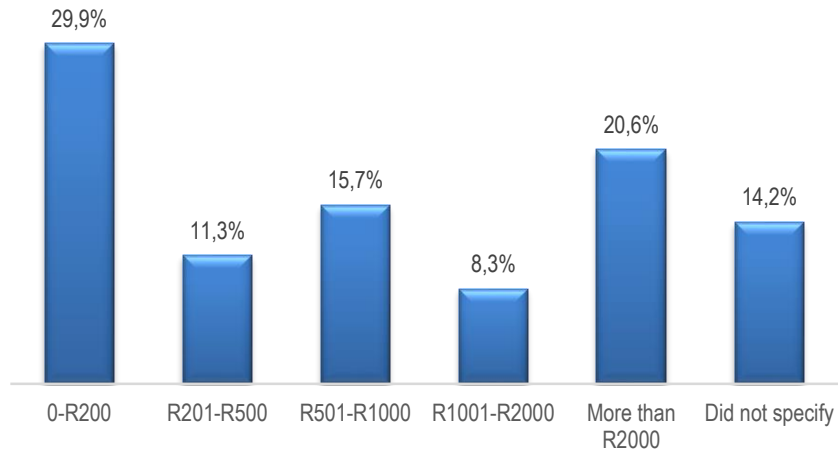
TOP INTERNATIONAL VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN - JUN 2021



% SHARE OF DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, JAN - JUN 2021

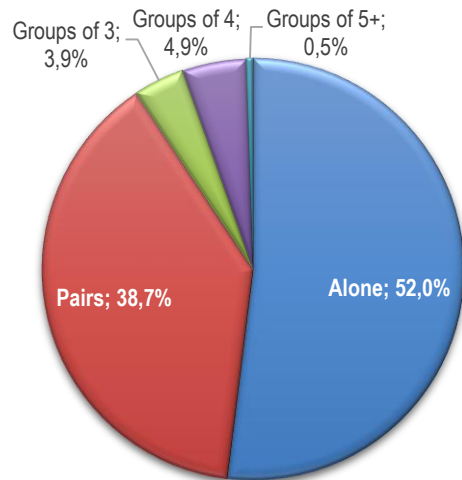


4.2 Average Daily Spend

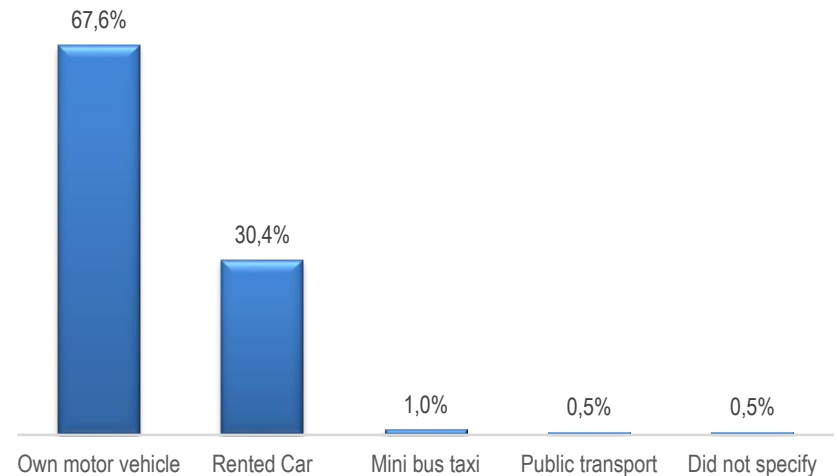


- Visitors to the Garden Route & Klein Karoo spent less than R200 on average (29,9%) while 20,6% of visitors spent more than R2000.
- Just over half of respondents travelled alone and 38,7% in pairs.
- Majority of respondents travelled to the region via their own motor vehicles (67,6%) or rented cars.

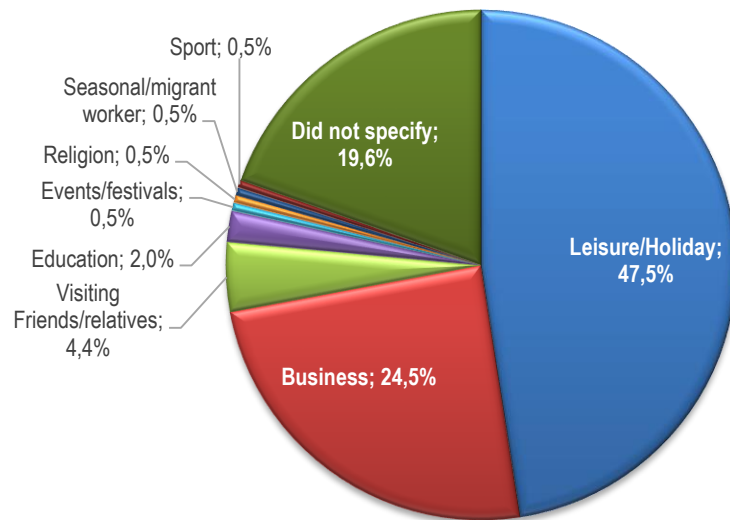
4.3 Group size



4.4 Mode of transport

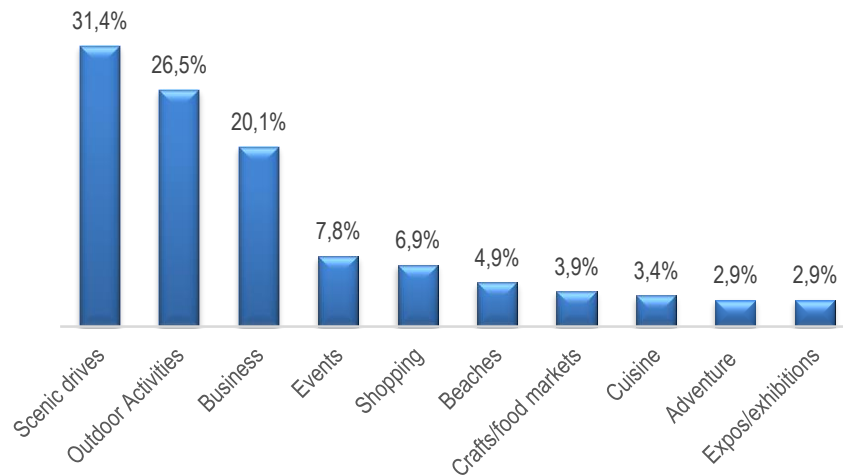


4.5 Main purpose of visit

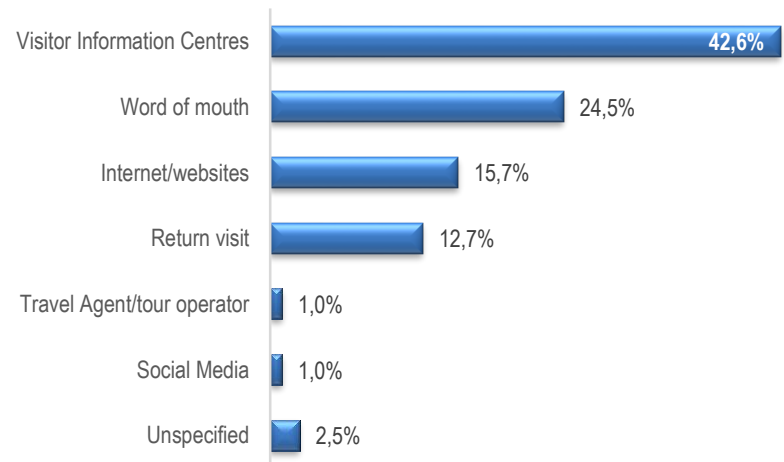


- The most prominent motivating factor for travel to the Cape Garden Route & Klein Karoo was for the purpose of holiday/leisure (47,5%) followed by business (24,5%).
- Scenic drives (31,4%), outdoor activities (26,5%), and business (20,1%) were the top 3 activities undertaken in the region.
- Visitor information centres (42,6%), word of mouth (24,5%) and internet/websites (15,7%) were the top 3 sources used by visitors to gather information about the region.

4.6 Top activities



4.7 Top information sources

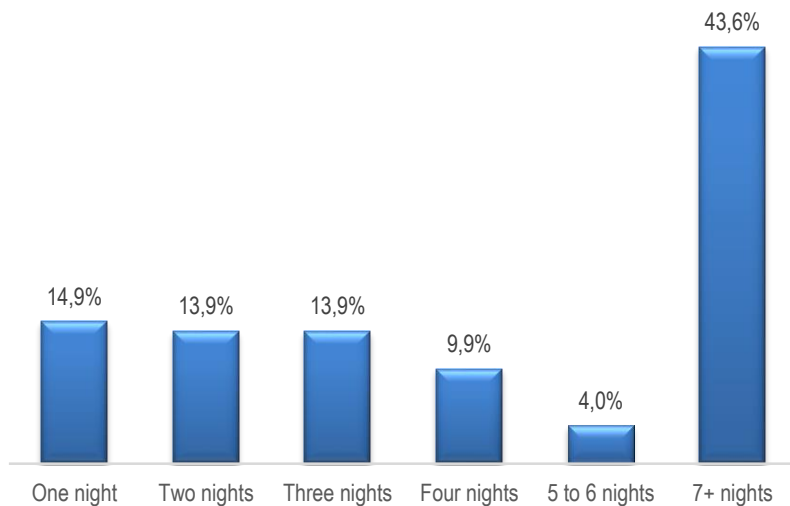


4.8 Overnight stay

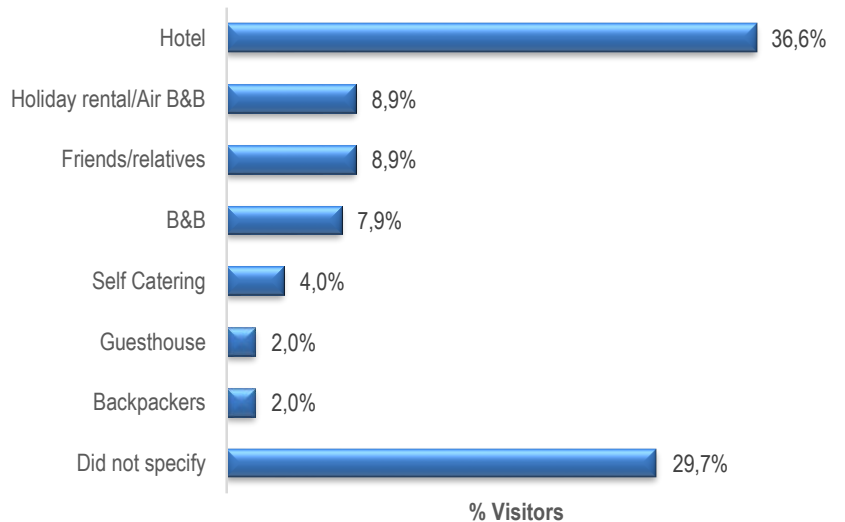


- There was an even split between overnight (49,5%) and day visitors (50,5%) to the Cape Garden Route & Klein Karoo over the Jan – Jun 2021 period.
- Majority of overnight visitors stayed for one night (14,9%), two nights (13,9%), or three nights (13,9%).
- Respondents indicated their preferred accommodation type to be hotel (36,6%), followed by holiday rental/ Air B&B (8,9%), and staying with friends/ relatives (8,9%).

4.9 Average Length of Stay



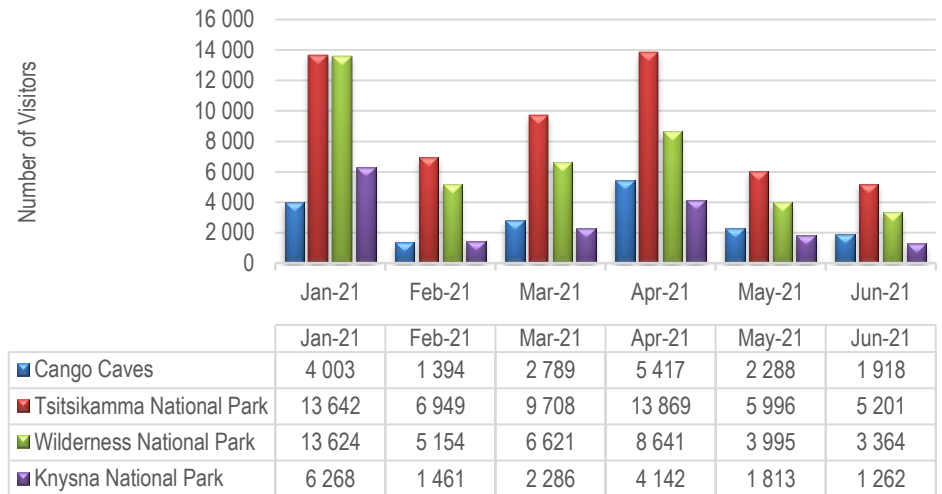
4.10 Accommodation Usage



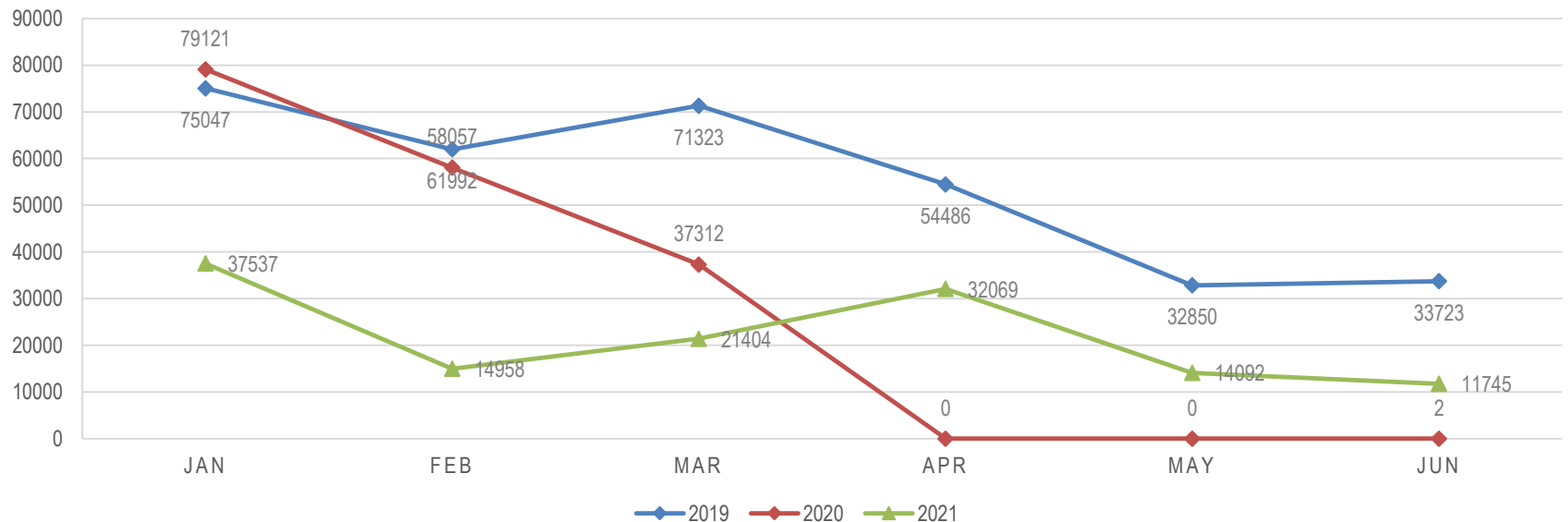
5. Cape Garden Route & Klein Karoo Attractions

- The Garden Route & Klein Karoo attractions received a total of 131 805 visitors over the period January to June 2021.
- Visitor numbers show an overall decrease of 60% over the same period in 2020.
- During the first half of 2021, January saw the highest recorded number of visitors (37 537 visitors) to the region followed by April with 32 069 visitors and March with 21 404 visitors.
- Tsitsikamma National Park was the most visited tourist attraction in the region with a total of 55 365 visitors over the period January to June 2021 followed by Wilderness National Park with 41 399 visitors.

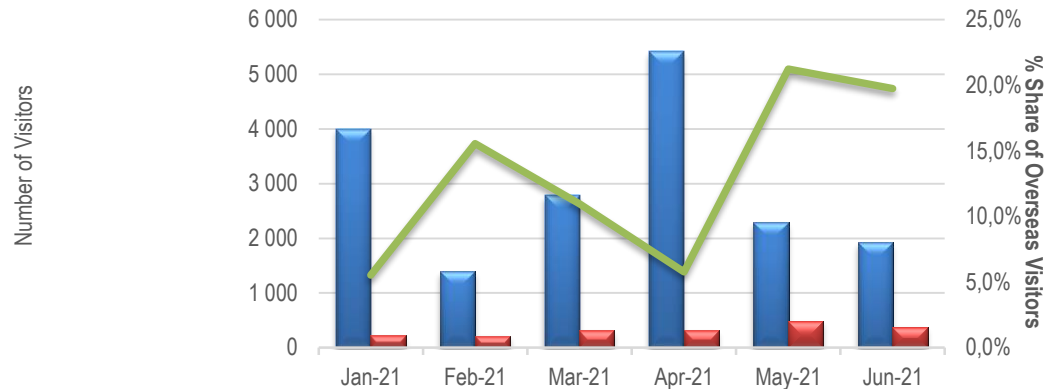
TOTAL NUMBER OF VISITORS TO THE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN - JUN 2021



TOTAL NUMBER OF VISITORS TO THE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN-JUN 2019 - 2021

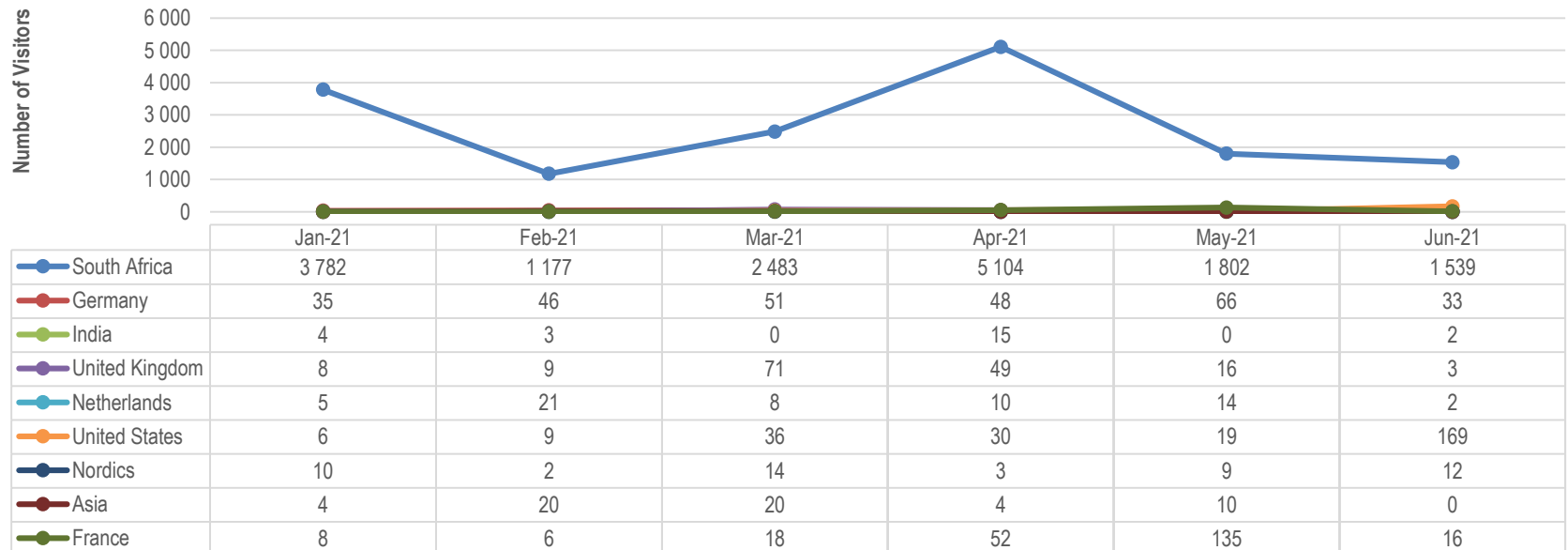


TOTAL NUMBER OF VISITORS TO THE CANGO CAVES: JAN - JUN 2021



- The Cango Caves welcomed a total of 17 809 visitors over the period January to June 2021. The highest recorded number of visitors occurred in April with 5 417 patrons visiting the attraction.
- Overseas visitor numbers were significantly lower than previous years due to COVID related travel restrictions.
- Germany, United States and France were the top three international source markets over the period January to June 2021, although the numbers are small.
- South African visitor numbers were highest in April and January, which coincides with the school holiday breaks.

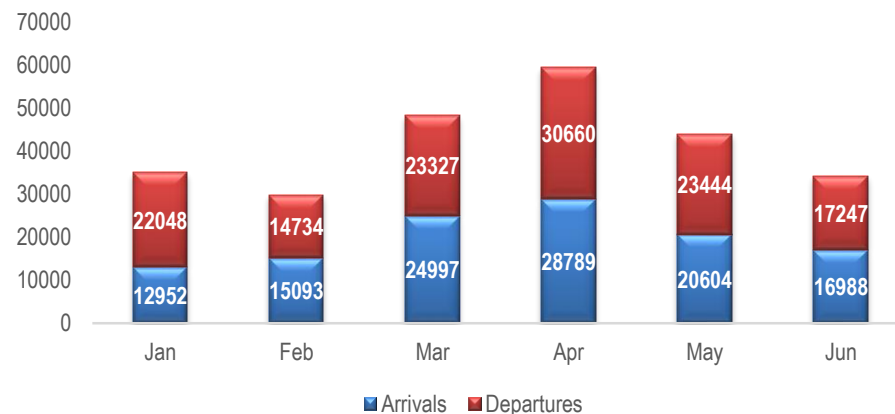
CANGO CAVES VISITOR DISTRIBUTION BY TOP SOURCE MARKETS: JAN - JUN 2021



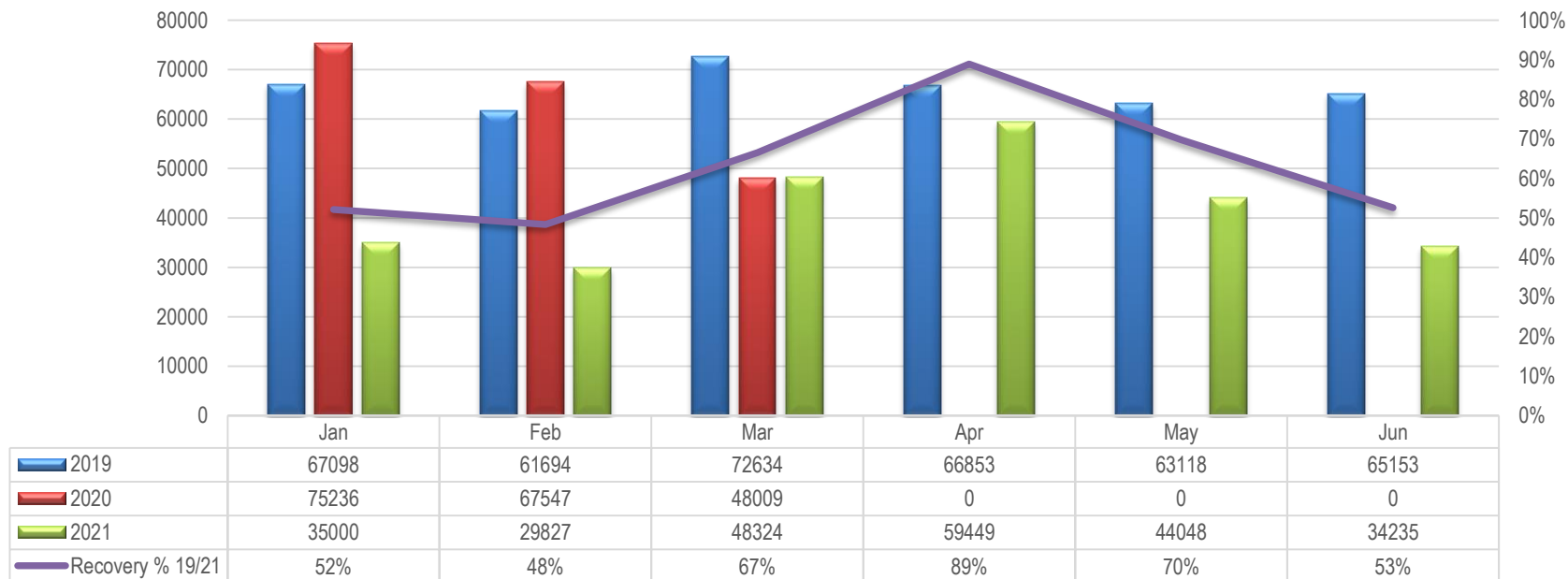
6. George Airport Passenger Movement

- George Airport reached its highest share of domestic arrivals at 28 789 passengers in April 2021, and an 89% recovery rate in passenger movement from its 2019 figure.
- There was a total of 119 423 in the first half of 2021 and grew by 33,4% when compared to the same period in 2020.
- Overall passenger movement through George Airport reached just over a quarter of a million passengers in the first half of 2021, a 63% recovery rate on its 2019 figure.

GEORGE AIRPORT ARRIVALS & DEPARTURES, JAN - JUN 2021

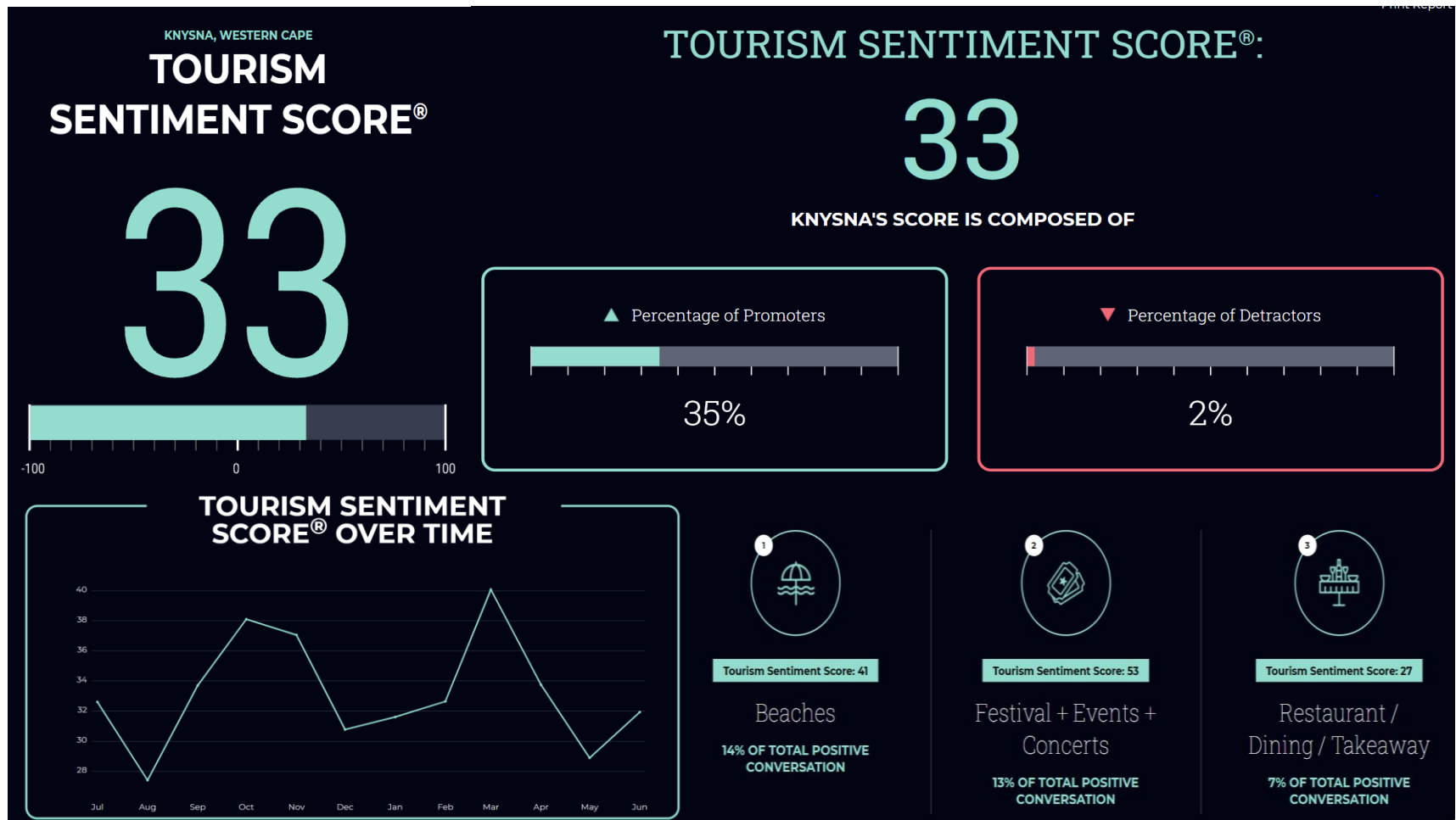


GEORGE AIRPORT PASSENGER MOVEMENT (ARRIVALS & DEPARTURES), JAN - JUN 2019-2021



6. Tourism Sentiment in Knysna

- TOURISM SENTIMENT SCORE® is a consolidated measure of a destination's ability to generate positive word of mouth about its tourism offering. It focuses solely on online conversations that reference or affect a potential traveller's perceptions of a destination's tourism offering.
- Knysna's Tourism Sentiment score is considered high at 33, compared to the rest of the world. More than a third of online conversations were actively recommending or speaking positively about the destination and 2% were actively discouraging or speaking negatively. The rest (63%) spoke about the destination from an indifferent point of view.
- Over the period January to June 2021, Tourism Sentiment in Knysna was driven by positive conversations around beaches, festivals, events and concerts as well as restaurant and dining experiences.



Source: Tourism Sentiment Index, 2021

7. 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

Additional Data Sources:

- Airports Company South Africa (ACSA)
- Tourism Sentiment Index (TSI)

For more information on this publication and other Wesgro publications please contact research@wesgro.co.za.



An inspiring place to know