



Western Cape Regional Trends

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1. Methodology

- This report provides an overview of the tourism trends and patterns in the Western Cape. 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

From January to December 2019, a total of **17,727** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. The participating regions were:

Cape Garden Route	5156
Cape Karoo	836
Cape Overberg	1643
Cape Town	750
Weskus	6191
Winelands	3151



3. Executive Summary

- The Western Cape is now well established as a tourist destination. The province attracted around 39.5% from the overseas market and 60.5% represented the domestic market.
- Germany (28.5%), the United Kingdom (21.3%) and Netherlands (7.0%) ranked as the top three international source markets across the regions of the Western Cape. These markets have proven to be the Western Cape's mainstay markets even throughout the winter months.
- Despite economic challenges, the Western Cape local market have remained resilient and continued to travel within their province. In 2019, the Western Cape (56.4%) ranked as the leading domestic market, driven by leisure as their top motivation for travel.
- Visitor trends indicated in this study confirmed the solid demand for holiday/leisure travel in the Western Cape (80.7%), despite the winter months included in this review.
- Visitors who were recorded across the respective regions were primarily between the age groups of 36-50 and 51-70 years, 21-35 years followed as the third largest share of respondents.
- Travelling in groups of three (34.6%) ranked as the most prominent travel group, followed by 22.4% who travelled in groups of four.
- In 2019, 53.4% of respondents indicated overnight stays in the province, while a share of 46.6% were day visitors. When taking a closer look at the trend in length in stay, visitors stayed on average one, two and three nights.
- Guesthouses, self-catering, B&Bs and hotels ranked as the top accommodation choices amongst travellers.
- According to the STR Global Hotel Performance, Cape Town (R1,165.54) and the Western Cape (R1,046.72) as a whole achieved the highest revenue amongst all provinces and top cities in 2019.
- Participating attractions in the Western Cape received 8 736 727 visitors over the period January to December 2019. Visitor numbers show an overall decline of -4.6% over the same period in 2018. Robben Island, one of the major attractions in Cape Town saw an increase of 1.3% year-on-year, and the biggest increase across participating attractions in the province was seen by Stony Point Nature Reserve (16,8%).

Western Cape Visitor Trends 2019

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%

share of overseas visitors	39.5%
share of domestic visitors	60.5%
share of overnight visitors	53.4%
share of day visitors	46.6%

Top 3 international markets

United Kingdom	(21.3%)
Germany	(28.5%)
Netherlands	(7%)

Top 3 domestic markets

Gauteng	(11.5%)
Western Cape	(56.4%)
Eastern Cape	(5.5%)

Main purpose of visit

Holiday/Leisure	80.7%
Events/festivals	3.1%
Business	3.8%

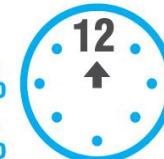


Travel group size
Groups of 3 34.6%
Groups of 4 22.4%

Age group
36-50 (34.6%)
51-70 (22.4%)

Length of stay

1 night	30%
2 nights	32.2%
3 nights	14.9%



Transport
Rented car — 29.5%
Own vehicle — 49.9%

Top information sources

Internet/Websites	17.8%
Word of mouth	30.2%

Average daily spend
R201 – R500 (17.8%)



Average spend on accommodation
R1001 – R2000 (18.7%)



Top 3 activities in the Western Cape



Top accommodation
Guesthouse 21.1%
Self-catering 25.9%

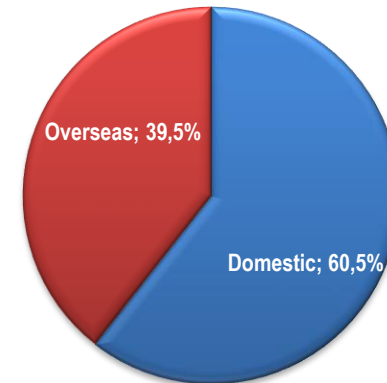
Scenic drives (21.9%) Outdoor activities (14%) Culture/Heritage (19.5%)

4. Western Cape Visitor Trends & Patterns

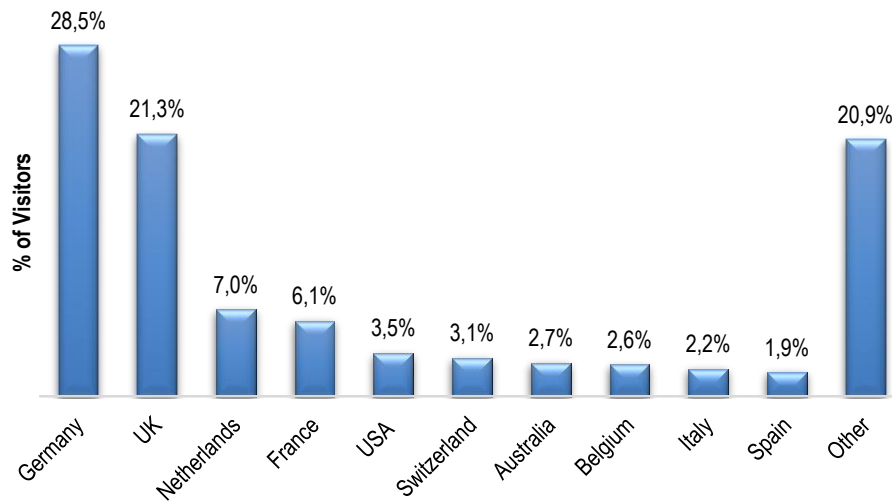
4.1 Origin of Visitors

- The regional spread of visitors across the Western Cape reflected a share of 39.5% from the overseas and 60.5% from the domestic market.
- The Western Cape is now well established as a tourist destination. According to the South African Tourism national statistics, the Western Cape attracted around R1.7 million international tourists in 2018 and generated R16.3 billion in foreign spend. Regional trends in this report further indicated that travel has spread across the regions of the Western Cape.
- Visitor trends in Jan – Dec 2019 reflected a steady flow from the top international markets; Germany (28.5%), the United Kingdom (21.3%) and Netherlands (7.0%). These markets have proven to be the Western Cape's mainstay markets even throughout the winter months.
- Despite economic challenges, the Western Cape local market has remained resilient and continued to travel within their province. In 2019, the Western Cape (56.4%) ranked as the leading domestic market, driven by leisure as their top motivation for travel.

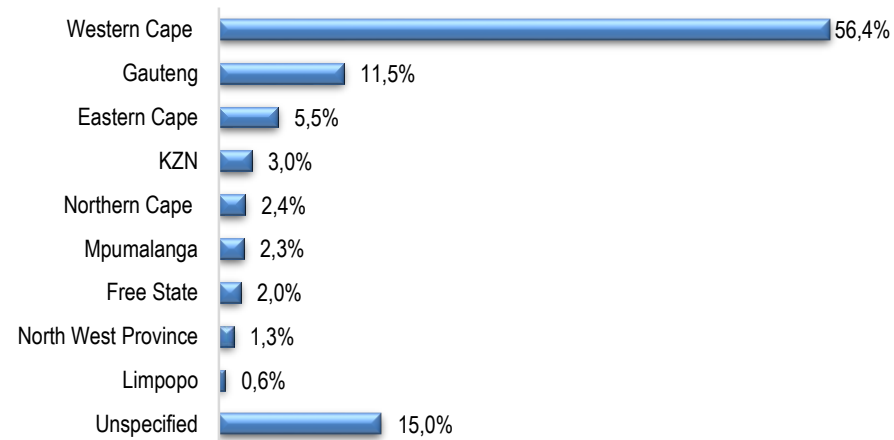
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE WESTERN CAPE, 2019



TOP INTERNATIONAL SOURCE MARKETS TO THE WESTERN CAPE, 2019

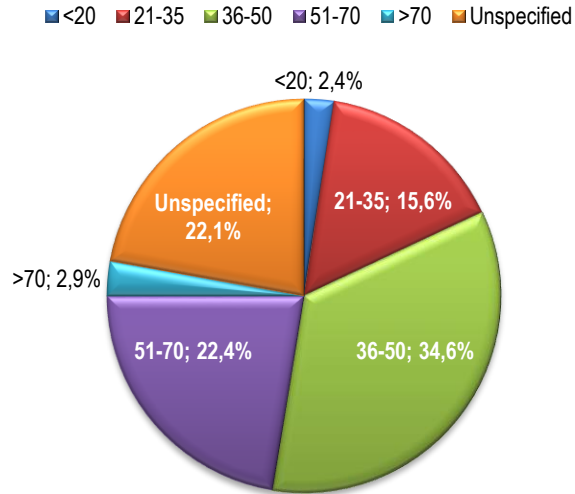


% SHARE OF DOMESTIC SOURCE MARKETS TO THE WESTERN CAPE, 2019



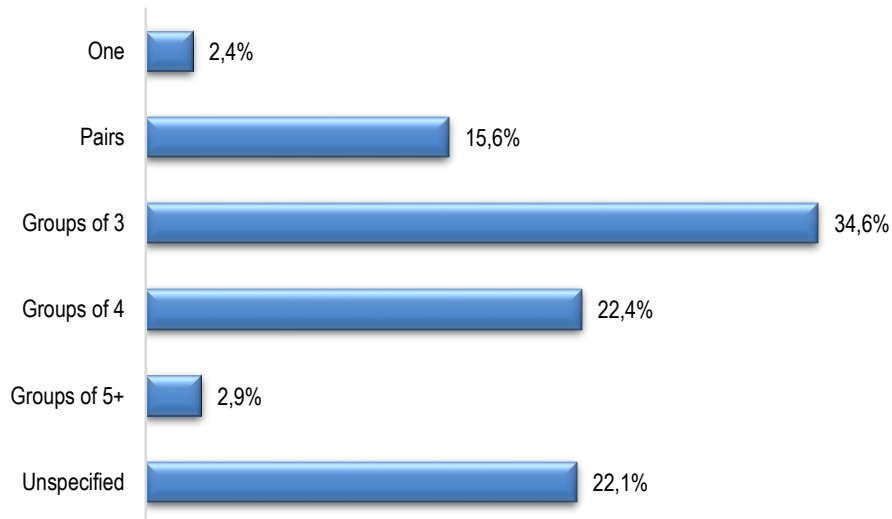
4. Western Cape Trends and Patterns

4.2 Age Profile of Visitors

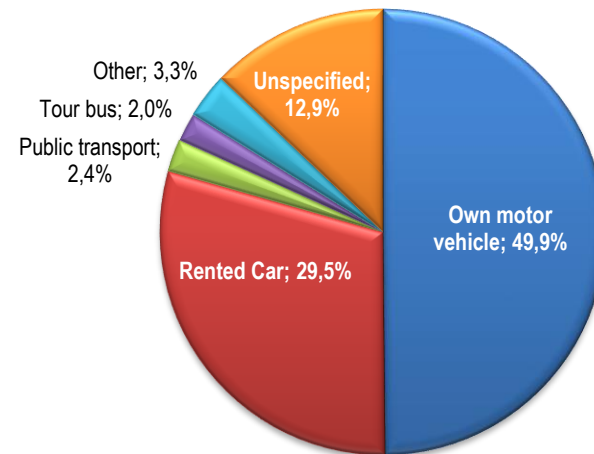


- The age groups 36-50 and 51-70 years emerged as the most common amongst visitors to the Western Cape. 21-35 years followed as the third largest share of respondents.
- Travelling in groups of 3 (34.6%) ranked as the most prominent travel group, followed by 22.4% who travelled in groups of 4.
- Own motor vehicles (49.9%) ranked as the top transport choice amongst visitors, followed by rented cars (29.5%) and public transport (2.4%).

4.3 Travel Group Size



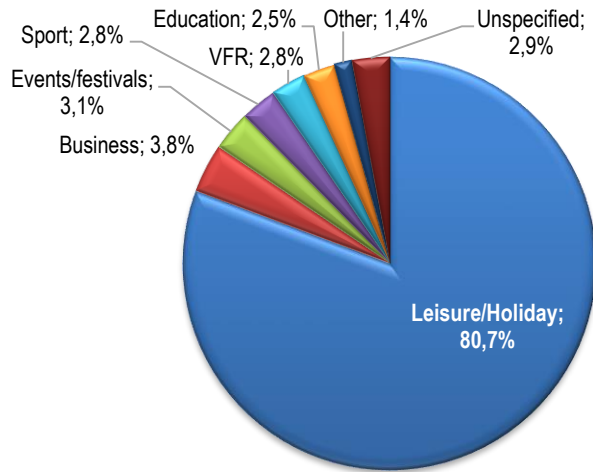
4.4 Mode of Transport



Other: Includes Shuttle service, Mini bus taxi, Metered taxi, Long distance bus, Motorbike, Train

4. Western Cape Trends and Patterns

4.5 Main purpose of visit

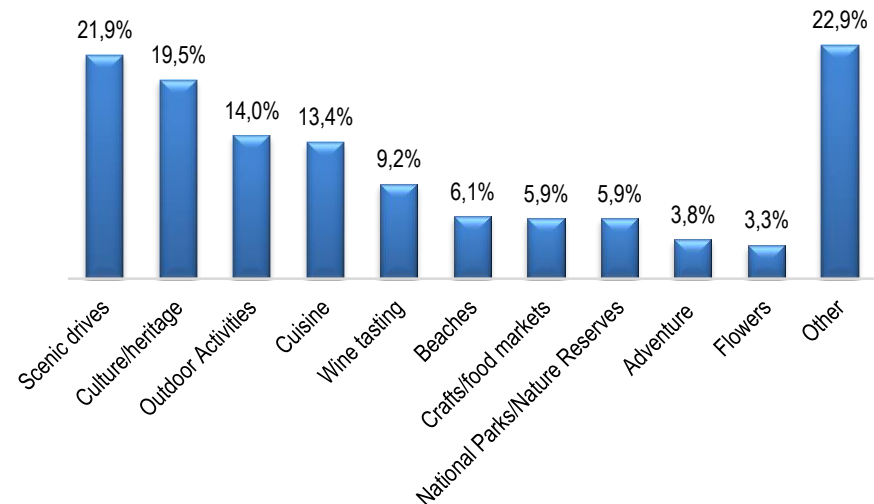


*Other: Includes travel for Seasonal/migrant work, Honeymoon/Weddings, Religion, Medical/health (spa, surgery, wellness).

- Scenic drives (21.9%), culture/heritage (19.5%) and outdoor activities (14.0%) ranked as the top three activities enjoyed by visitors to the Western Cape.
- The Western Cape government together with Wesgro have been mandated to develop key strategies for identifying niche markets. Plans are well advanced for establishing the Cape as the Cycling capital of Africa. Culture/heritage have recently also emerged as a priority niche tourism market for the province, with the launch of the Cradle of Human Culture Route with three anchor sites in the Western Cape.
- Additional plans also include growing Madiba Legacy Tourism, by establishing a Madiba Legacy Route and promoting the region as a Global Food and Wine destination. These niche tourism areas holds strong potential for growth and sustainable tourism for the Western Cape.

- Holiday/leisure (80.7%) led as the top reason for travel to the province, followed by business travel (3.8%), Events/festivals (3.1%), Visiting Friends/Relatives (2.8%), and Sport (2.8%).
- While the share of business travellers tracked during this study accounted for only 3.8%, national trends released by South African Tourism confirms the equally growing demand for business amongst overseas and domestic markets to the Western Cape.

4.6 Top activities undertaken in the Western Cape



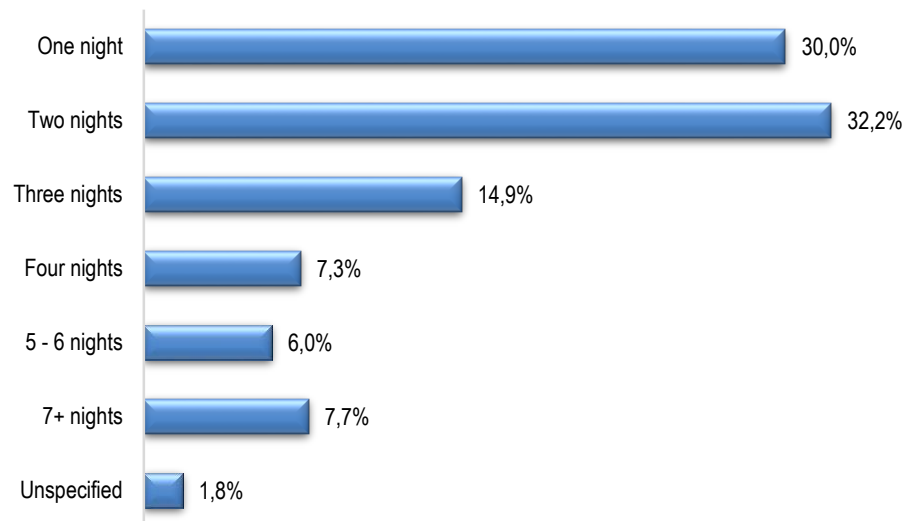
*Other: Includes Birding, Cruises, Business, Whale watching, Shopping, Events, Golf, Shark cage diving, Fishing, Karoo Lamb (Cape Karoo Farms), Game Reserves, Health & wellness, Expos/exhibitions, Sporting events-participant, Cycling, Ostriches, Nighlife/clubbing, Astro Tourism, Sporting events-spectator, Gambling

4. Western Cape Trends and Patterns

4.7 Overnight vs. Day Visitors

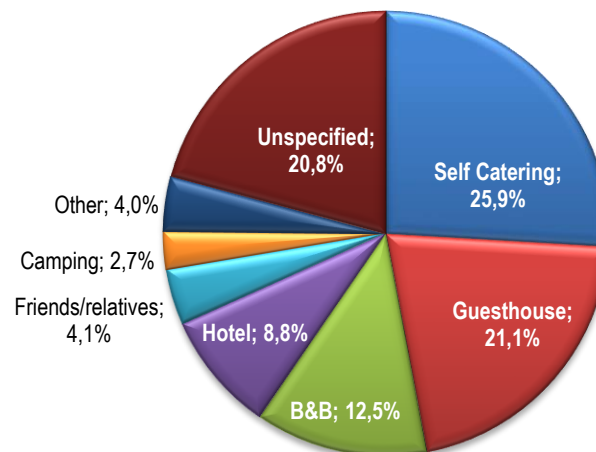


4.8 Average length of stay



- Between January and December 2019, 53.4% of respondents indicated overnight stays in the province, while a share of 46.6% were day visitors. When taking a closer look at the trend in length in stay, visitors stayed on average one, two and three nights.
- This trend underlines the Western Cape's popularity in weekend getaways, as well as extended leisure holidays for up to a week and more (7.7%).
- Self-catering, Guesthouses, B&Bs and Hotels ranked as the top accommodation choices amongst travellers. Of the respondents who indicated overnight stays, a share of 20.8% did not indicate their type of accommodation in the survey.

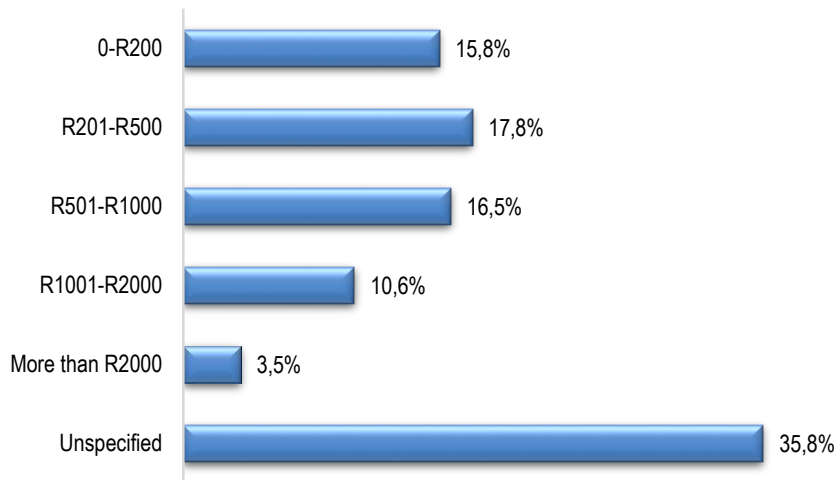
4.9 Accommodation Usage



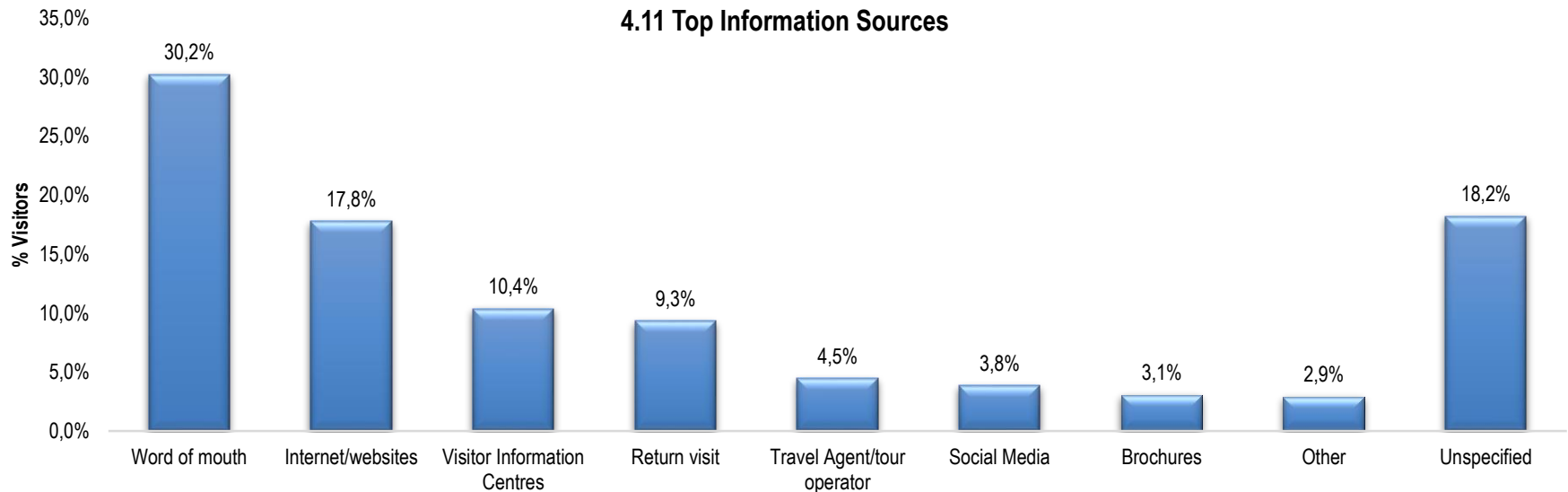
*Other: Includes backpackers, rented house/apartment/Air BnB, timeshare, second home/holiday house and golf estate.

4. Western Cape Trends and Patterns

4.10 Average daily spend



- On average, visitors spent between R201-R500 (17.8%) per day in the Western Cape. R501-R1000 (16.5%) followed as the second most common expenditure range, and 15.8% spent less than R200 per day. 35.8% of respondents did not indicate their average daily spend in the Western Cape.
- The share included in this study only represents a participative sample of travellers who entered through the tourism offices. However, national trends indicate that tourism is a very important sector for the Western Cape with huge growth and economic potential. In 2018, foreign tourist arrivals to the Western Cape translated into a total foreign spend of R16.3 billion, while the domestic market added an additional R1.9 billion to the economy.
- Word of mouth (30.2%) and internet/websites (17.8%) ranked as the top sources for obtaining information on the province. 9.3% of respondents were return visitors, a trend which indicates success in the Western Cape's marketing efforts.



*Other: Includes TV/Radio, books/magazines, and newspapers.

5. Trends and patterns by region

OVERVIEW OF REGIONAL VISITOR TRENDS AND PATTERNS BY REGION, JAN – DEC 2019						
Tourism Indicator	Cape Town	Cape Garden Route & Klein Karoo	Cape Winelands	Weskus	Cape Karoo	Cape Overberg
% Share overseas	-	48.4%	42.9%	22.7%	7.5%	58.9%
% Share domestic	-	51.6%	57.1%	77.3%	92.5%	41.1%
% Share of overnight visitors	96.0%	78.6%	19.4%	38.3%	34.4%	80.6%
% Share of day visitors	4.0%	21.4%	80.6%	61.7%	65.6%	19.4%
Top international markets	Germany (16.2%)	Germany (32.1%)	Germany (33.0%)	Germany (23.2%)	UK (23.8%)	UK (33.0%)
	UK (11.7%)	UK (17.8%)	UK (25.2%)	UK (20.5%)	Germany (12.7%)	Germany (30.7%)
	France (8.5%)	Netherlands (8.4%)	Netherlands (7.5%)	Netherlands (7.2%)	France (11.1%)	France (5.0%)
Top domestic markets	Western Cape (39.6%)	Western Cape (31.4%)	Western Cape (49.2%)	Western Cape (73.3%)	Western Cape (41.1%)	Western Cape (73.1%)
	Gauteng (31.3%)	Eastern Cape (14.8%)	Gauteng (6.9%)	Gauteng (11.7%)	Gauteng (23.2%)	Gauteng (10.5%)
	Limpopo (4.2%)	Gauteng (10.7%)	KZN (1.7%)	Mpumalanga (3.4%)	Free State (7.0%)	KZN (6.4%)
Main purpose of visit	Holiday/Leisure (86.8%)	Holiday/Leisure (74.1%)	Holiday/Leisure (91.1%)	Holiday/Leisure (80.2%)	Holiday/Leisure (77.2%)	Holiday/Leisure (82.7%)
	Business (4.1%)	Sport (8.6%)	Education (3.0%)	Education & Business (3.4%)	Business (11.5%)	VFR (6.8%)
Age profile of visitors	-	-	36 – 50 (45.5%)	36 – 50 (42.4%)	51 – 70 (33.5%)	36 – 50 (30.2%)
Most common travel group size	-	-	Groups of 3 (45.5%)	Groups of 3 (42.4%)	Groups of 4 (33.5%)	Groups of 3 (30.2%)
	-	-	Groups of 4 (34.7%)	Groups of 4 (26.2%)	Groups of 3 (32.8%)	Groups of 4 (22.5%)
Most common length of stay	7+ nights (33.6%)	2 nights (36.8%)	2 nights (50.0%)	2 nights (31.6%)	2 nights (34.4%)	1 night (57.2%)
	5 – 6 nights (23.9%)	1 night (34.6%)	3 nights (17.8%)	3 nights (23.7%)	1 night (41.3%)	2 nights (21.2%)
Most common mode of transport	Public transport (21.5%)	Own vehicle (41.8%)	Own vehicle (57.6%)	Own vehicle (55.9%)	Own vehicle (80.9%)	Rented Car (48.1%)
	Rented Car (20.8%)	Rented Car (37.0%)	Rented Car (37.7%)	Rented Car (17.9%)	Rented Car (9.9%)	Own vehicle (41.4%)
	Tour bus (16.4%)					
Top information sources	-	Internet (28.6%)	Word of mouth (65.1%)	VIC's (22.5%)	Word of mouth (47.6%)	Word of mouth (50.2%)
	-	Word of mouth (14.4%)	Internet (17.9%)	Word of mouth (18.5%)	VIC's (15.9%)	Return visit (14.9%)
Average daily spend	-	-	R0 – R200 (25.9%)	-	R0 – R200 (42.5%)	R501 – R1000 (35.6%)
Type of accommodation	-	Self Catering (27.1%)	Guesthouse (29.7%)	Self Catering (37.4%)	B&B (21.9%)	-
	-	Guesthouse (25.6%)	Self Catering (19.6%)	Guesthouse (24.5%)	Guesthouse (18.8%)	-
Top three activities undertaken	Outdoor Activities (52.4%)	Scenic drives (19.8%)	Culture/Heritage (27.5%)	Scenic drives (24.4%)	Culture/Heritage (59.0%)	Scenic drives (40.2%)
	Scenic drives (29.6%)	Culture/Heritage (14.6%)	Wine tasting (19.9%)	Culture/Heritage (16.5%)	Crafts/food markets (25.9%)	Cuisine (31.9%)
	Culture/heritage (17.5%)	Outdoor Activities (13.2%)	Cuisine (15.9%)	Cuisine (15.3%)	Karoo Lamb (19.3%)	Outdoor Activities (26.3%)

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

6. Performance of Western Cape Attractions

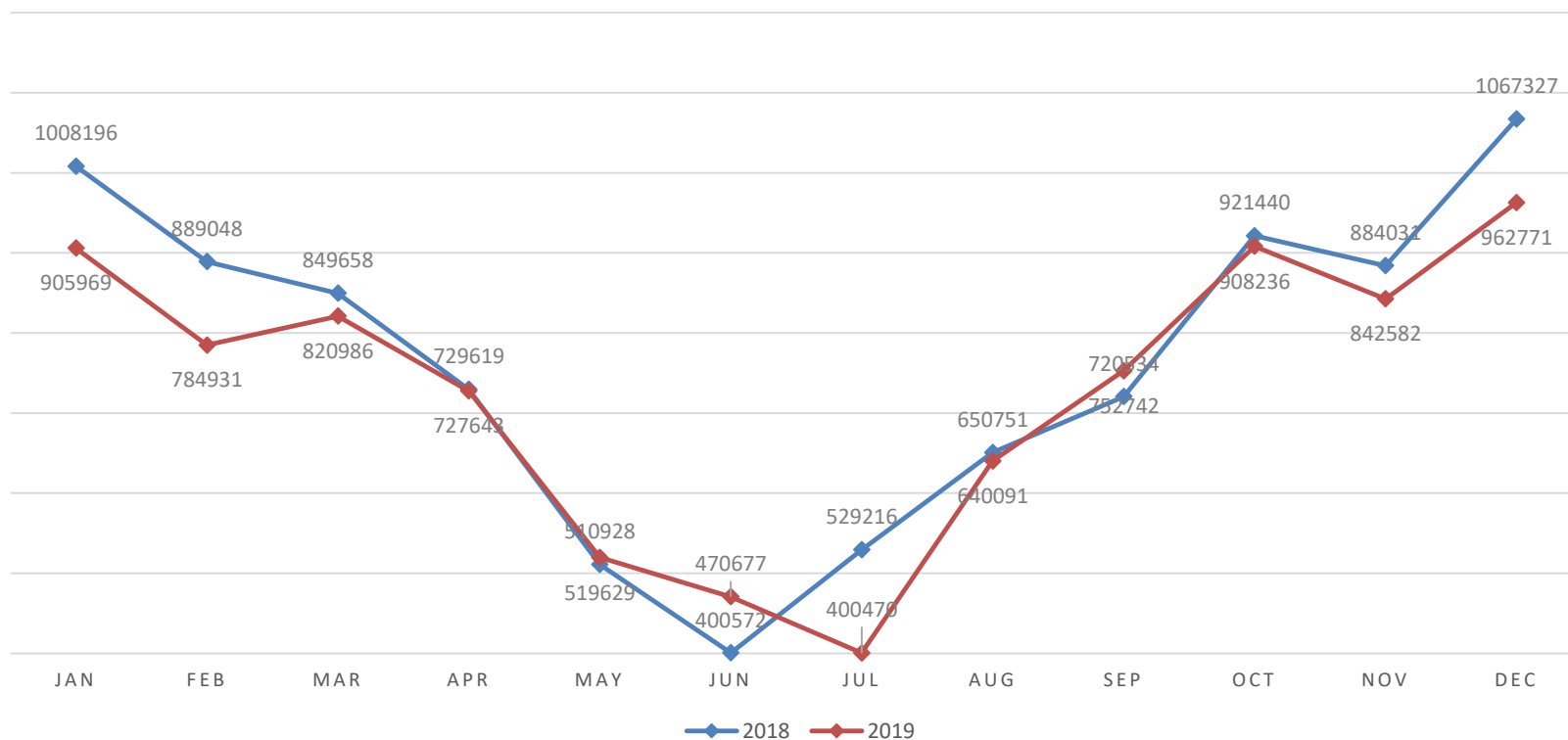
TOTAL NUMBER OF VISITORS BY PARTICIPATING REGIONAL ATTRACTION, 2019

ATTRACTIONS	2018	2019	18/19 % Change
Cape Town			
Kirstenbosch Botanical Gardens	933 473	921 421	-1,3%
Robben Island	311 847	315 821	1,3%
Table Mountain National Park	3 340 986	3 164 464	-5,3%
Table Mountain National Park: Boulders	892 923	820 351	-8,1%
Table Mountain National Park: Cape of Good Hope	1 154 063	1 135 894	-1,6%
Table Mountain Aerial Cableway	1 162 313	1 099 615	-5,4%
Cape Overberg			
Cape Agulhas Lighthouse	33 645	34 562	2,7%
Agulhas National Park	38 842	40 550	4,4%
Bontebok National Park	21 484	22 466	4,6%
De Hoop Nature Reserve	24 861	21 751	-12,5%
De Mond Nature Reserve	8 266	7 170	-13,3%
Harold Porter National Botanical Gardens	60 423	43 394	-28,2%
Kogelberg Nature Reserve	10 688	6 858	-35,8%
Stony Point	73 369	85694	16,8%
Garden Route & Klein Karoo			
Cango Caves	252 330	237 129	-6,0%
Wilderness National Park	128 519	166 764	3,3%
Tsitsikamma National Park	365 599	345 098	-5,6%
Weskus			
West Coast National Park	292 423	263 446	-9,9%
!Khwattu	18 584	19 022	2,4%
Old Jail	8 012	6 662	-16,8%
Cape Karoo			
Karoo National Park	34 554	31 426	-9,1%

6. Performance of Western Cape Attractions

- The participating Western Cape Attractions received 8 736 727 visitors over the period January to December 2019.
- Visitor numbers show an overall decline of -4.6% over the same period in 2018. Visitor numbers were considerably higher in June 2019 with a 17.5% increase when compared to June 2018.
- Over the Jan – Dec 2019 period, December, October, and January saw the highest recorded visitor numbers, which coincides with Cape Town's high season period.

TOTAL NUMBER OF VISITORS TO THE WESTERN CAPE ATTRACTIONS, 2019



7. 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 (+3.8%) 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

8. 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 following regions:

*Cape Garden Route & Klein Karoo
Cape Karoo
Cape Overberg
Cape Town
Weskus
Cape Winelands*

The participating attractions in Cape Town and the Western Cape:

*Kirstenbosch National Botanical Gardens
Robben Island
Table Mountain National Park: Boulders
Table Mountain National Park: Cape of Good Hope
Table Mountain Aerial Cableway
Cape Agulhas Lighthouse
Harold Porter National Botanical Gardens
Kogelberg Nature Reserve
De Hoop Nature Reserve
De Mond Nature Reserve
Stony Point
Cango Caves
!Khwattu
Old Jail*

The following South African National Parks in the Western Cape:

*Agulhas National Park
Bontebok National Park
Karoo National Park
Table Mountain National Park
Tsitsikamma National Park
West Coast National Park
Wilderness National Park*

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