



Cape Karoo Regional Visitor Trends

WesGRO
cape town & western cape
research

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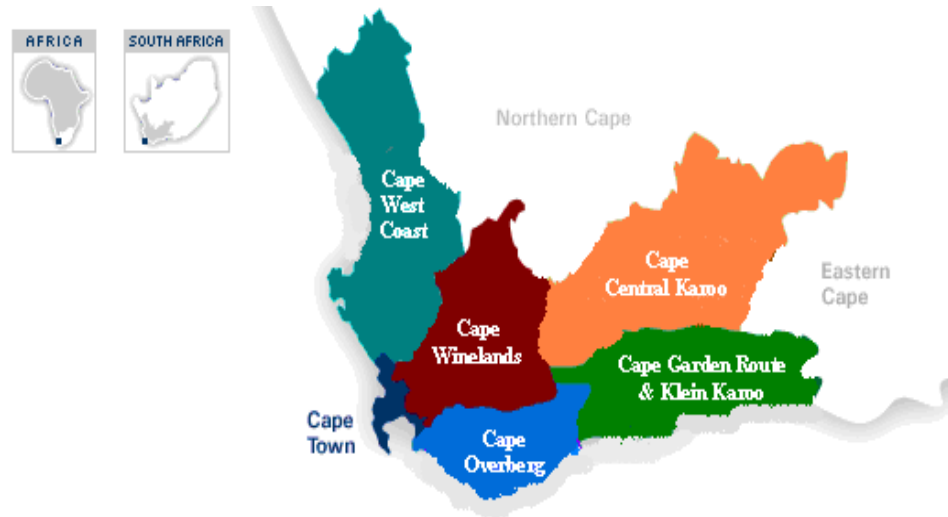
1. Methodology

- 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 June 2017, a total of **391** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Karoo. The participating Tourism Offices were:

Laingsburg	329
Beaufort West	62



3. Executive Summary

- Cape Karoo received 13,1% overseas visitors and 86,7% domestic visitors illustrating very high percentage share of domestic visitors and very low percentage share of overseas visitors.
- Cape Karoo received 24,4% of overnight visitors making positive contribution to the accommodation sector and 74% day visitors.
- The highest percentage share of domestic visitor to the Cape Karoo came from the Western Cape (60%), followed by Gauteng (12,7%) and Eastern Cape (9,3%)
- Visitors to the region enjoyed travelling in pairs most likely as couples or in groups of four which could be your families or tour groups.
- The most popular age category of visitors to the region were visitors aged between 51-70 (36,9%)
- 89,5% of visitors came for holiday, 7,9% came for business and 1,0% came to the Cape Karoo to visit friends and family.
- Visitors to the Cape Karoo chose own motor vehicle 78,9% and rented car 12,1% as their main choice of transport to the region.
- Internet/websites (21,2%) and word of mouth (28,2%) was the top two choices of sourcing information.
- Spend patterns revealed 41,5% of visitors to the region mostly spent between R201-R500.
- R1001-R2000 (9,2%) was the highest percentage share spent on accommodation, which contributes positively to the accommodation sector of the region increasing occupancy rates.
- Overseas visitors mostly enjoyed scenic drives (15,5%), culture & heritage (25,8%) and outdoor activities (12,3%).
- Domestic visitors enjoyed scenic drives (12,3%), adventure (11,2%) and Karoo lamb (10,5%).
- Visitors to the Cape Karoo enjoyed staying at guesthouses and in self catering accommodation.

Cape Karoo Visitor Trends Jan - Jun 2017

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%

share of overseas visitors	13.1%
share of domestic visitors	86.7%
share of overnight visitors	24.4%
share of day visitors	74%

Top 3

International markets

United Kingdom (21.2%)
Germany (23.1%)
Netherlands (11.5%)

Top 3 domestic markets

Gauteng (12.7%)
Western Cape (60%)
Eastern Cape (9.3%)

Main purpose of visit

Holiday/Leisure	89.5%
Business	7.9%
VFR	1%



Travel group size
Pairs 33.9%
Fours 21.9%

Age group

36-50 (32.3%)
51-70 (36.9%)

Length of stay

1 night 15.2%
2 nights 13.5%
3 nights 2.7%



Transport

Rented car — 12.1%
Own vehicle — 78.9%

Top information sources

Internet/Websites..21.2%
Word of mouth.....28.2%

Average daily spend
R201 – R500 (41.5%)



Average spend on accommodation
R1001 – R2000 (9.2%)



Top 3 activities in the Cape Karoo



Top accommodation

Guest house 7.8%
Self-catering 5.4%



Overseas Domestic

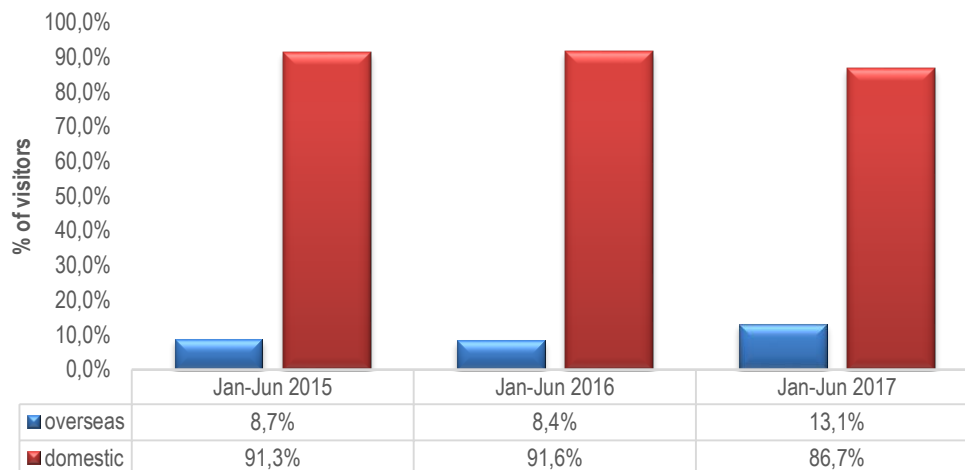
Culture (25.8%) Scenic drives (15.5%) Outdoor activities (15.9%)
Scenic drives (12.3%) Adventure (11.2%) Karoo lamb (10.5%)

4. Cape Karoo Trends & Patterns

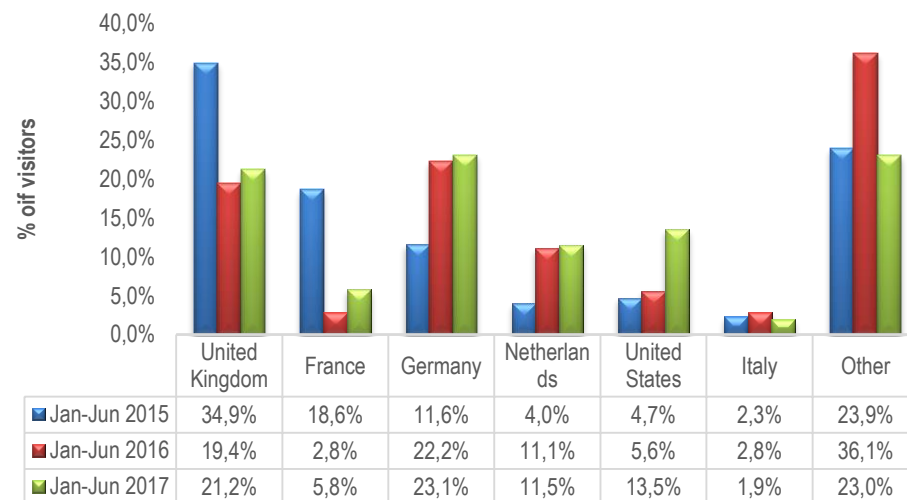
4.1. Origin of visitors

- Cape Karoo received over 80% share of domestic visitors in 2017 slightly lower when compared to the same period of the previous years.
- There was a positive increase in overseas visitors to the region when compared to the same period of the previous years.
- The Cape Karoo received a highest percentage share of visitors from the United Kingdom, Germany and Netherlands. The other includes smaller sample size of countries to the region.
- From 2015-2017 the Western Cape market consistently led domestic travel into the Cape Karoo, followed by Gauteng and the Eastern Cape. The other includes smaller sample size of domestic provinces to the region.

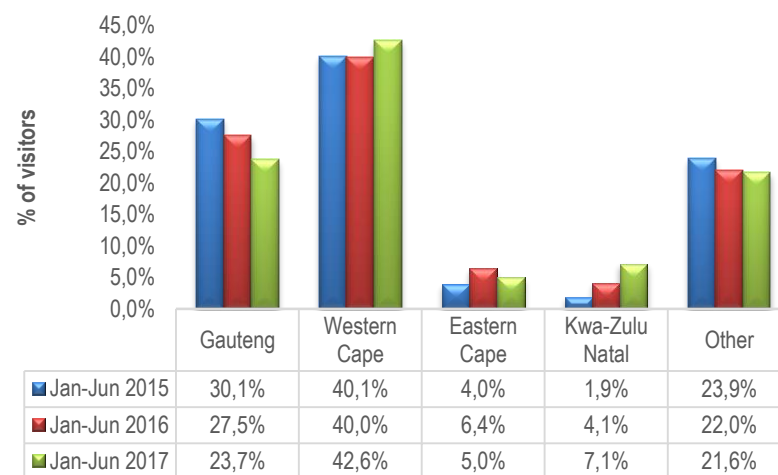
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE KAROO, JAN- UN 2015-2017



TOP OVERSEAS VISITORS TO THE CAPE KAROO, JAN-JUNE 2015-2017

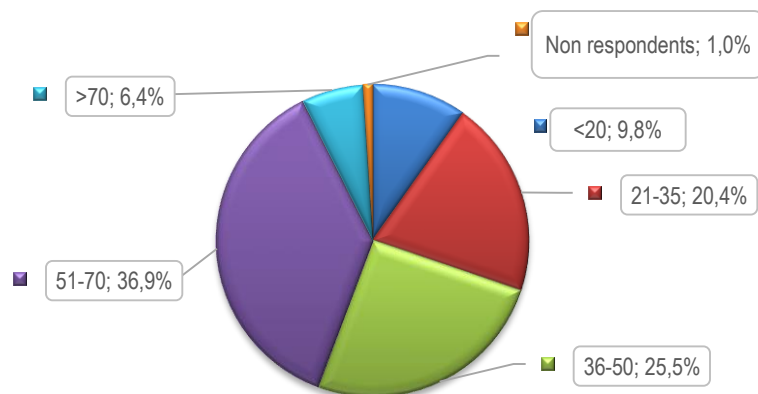


TOP DOMESTIC MARKETS TO THE CAPE KAROO, JAN-JUNE 2015-2017



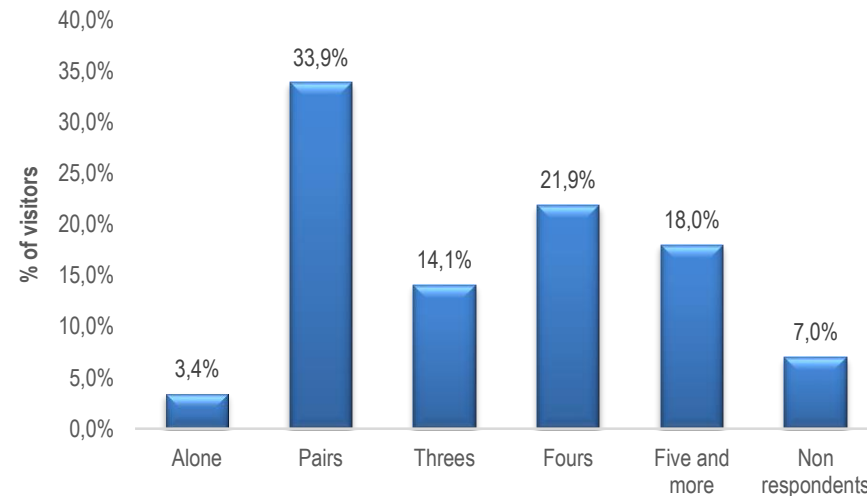
4.2 Age group

AGE GROUP OF VISITORS TO THE CAPE KAROO, JAN-JUN 2017



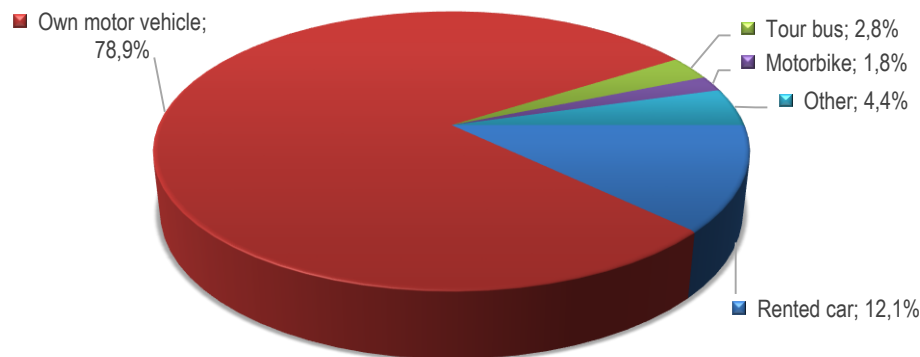
4.3 Group size

TRAVEL GROUP SIZE OF VISITORS TO THE CAPE KAROO, JAN -JUN 2017



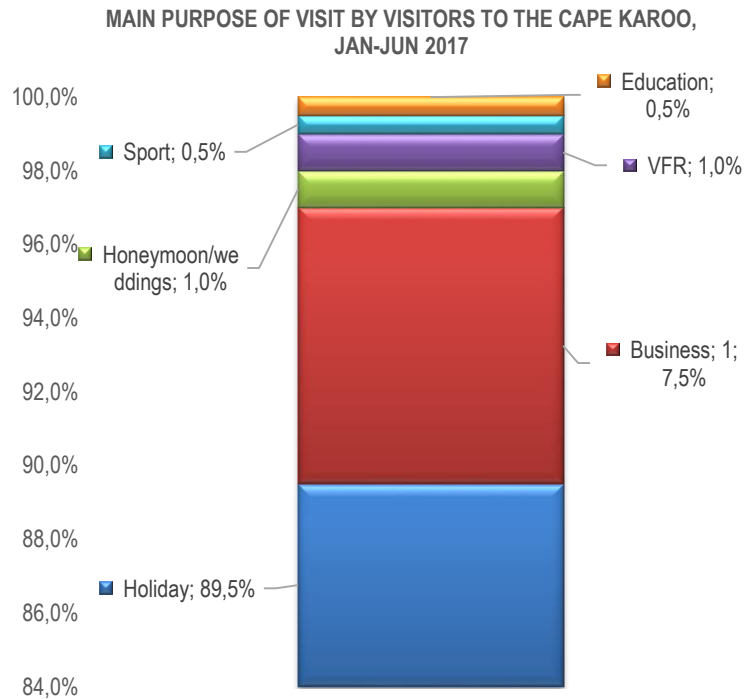
4.4 Mode of transport

MAIN MODE OF TRANSPORT USED BY VISITORS TO THE CAPE KAROO, JAN-JUN 2017

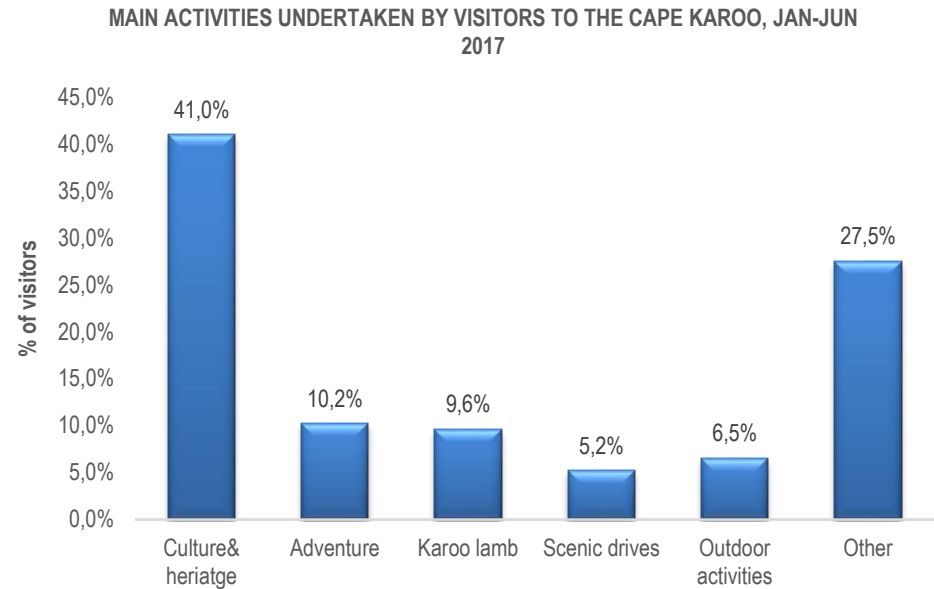


- The age groups (51-70 years) 36,9% was the leading age group amongst all visitors to the Cape Karoo.
- The travel group size revealed that visitors to the region enjoyed travelling in pairs 33,9%, which could be your couples or friends.
- Based on surveys received by the tourism offices of the region the majority stated that own motor vehicle (78,9%) and rented car (12,1%) was the most favourable mode of transport used by visitors to the Cape Karoo.

4.5 Purpose of visit



4.6 Main activities

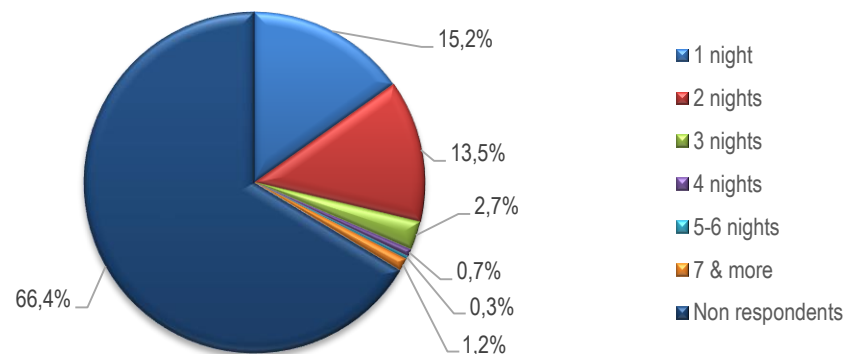


- The trends revealed that holiday/leisure ranked as the main motivation for travel to the Cape Karoo with percentage share of 89,5%.
- Visitors to the region also came for business 7,5% and visiting friends and family 1,0%
- Culture/heritage experiences (41,0%) was main type of activity undertaken by visitors to the Cape Karoo.
- Karoo lamb is becoming growing niche activity in the region.

4.7 Length of stay

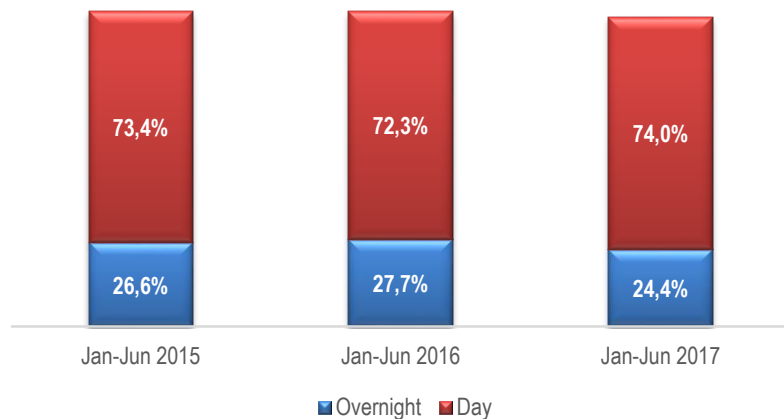
- The majority of the visitors to the Cape Karoo stayed for one night (15,2%) and two nights (13,5%).
- The trends from January to June 2017 revealed a strong share of day visitors 74,0% than overnight visitors 24,4% amongst all visitors to the Cape Karoo.
- Therefore, the trends illustrate the Cape Karoo as a popular destination for day visits perhaps for events or using the area as stop over on route to the rest of the Western Cape.
- Guesthouse 7,8% and self catering 5,4% accommodation was the main choice of accommodation used by visitors to the Cape Karoo.

AVERAGE LENGTH OF STAY OF VISITORS TO THE CAPE KAROO, JAN-JUN 2017



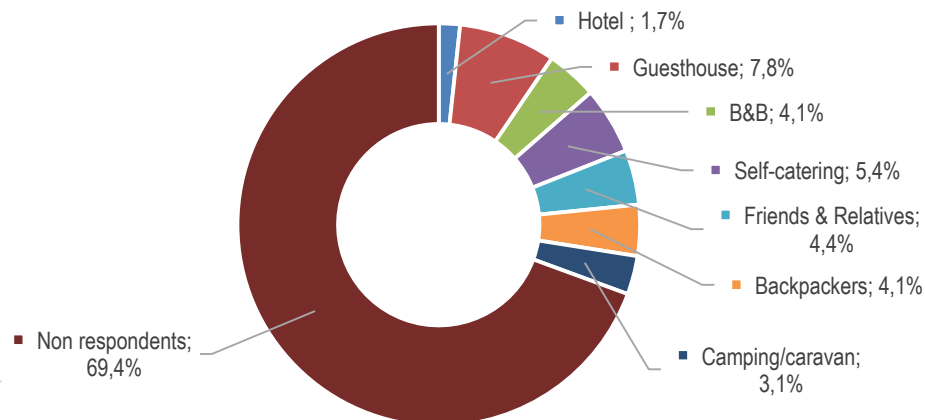
4.8 Overnight stay

OVERNIGHT AND DAY VISITORS TO THE CAPE KAROO, JAN-JUN 2015-2017



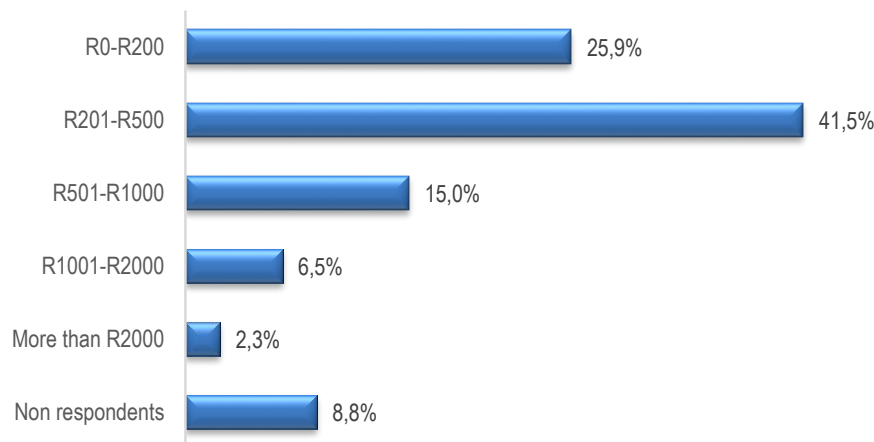
4.9 Accommodation used by visitors

MAIN ACCOMMODATION USED BY VISITORS TO THE CAPE KAROO, JAN-JUN 2017



4.10 Average daily spend

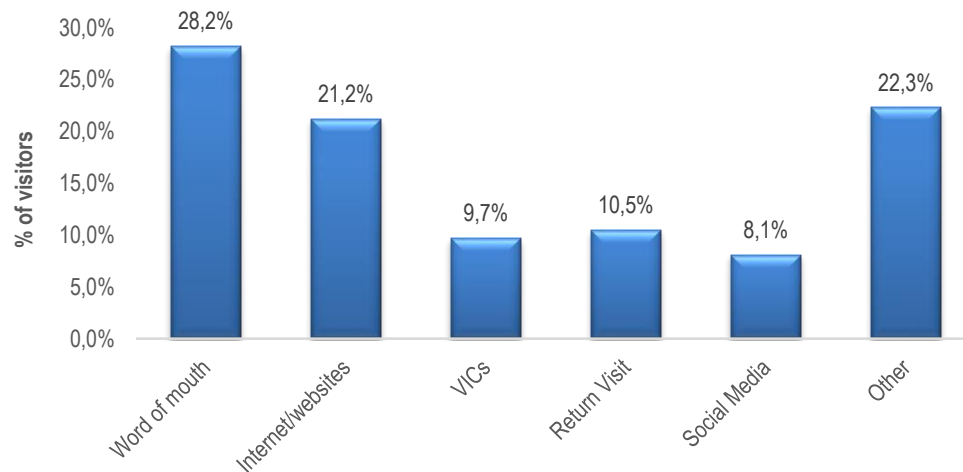
AVERAGE DAILY SPEND BY VISITORS TO THE CAPE KAROO, JAN-JUN 2017



- The highest average daily spend in 2017 for the Cape Karoo was R201-R500 (41,5%).
- R0-R200 (25,9%) and R501-R1000 (15,0%) were also amongst the highest daily spend for visitors to the region.
- Internet/websites (21,2%) and word of mouth (28,2%) were the most popular source of information used.
- Amongst all visitors to the Cape Karoo the highest expenditure range on accommodation was R1001-R2000 (9,2%).

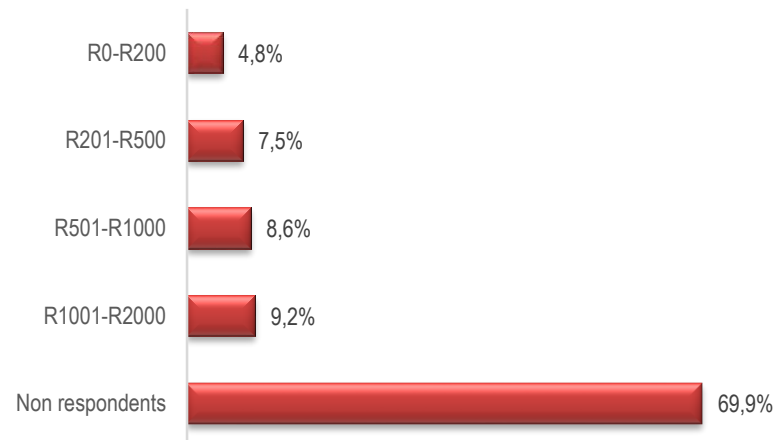
4.11 Information sources used

MAIN SOURCE OF INFORMATION USED BY VISITORS TO THE CAPE KAROO, JAN-JUN 2017



4.12 Average spend on accommodation

AVERAGE SPEND ON ACCOMMODATION USED BY VISITORS TO THE CAPE KAROO, JAN-JUN 2017



5. Profile/Snapshot of top domestic markets

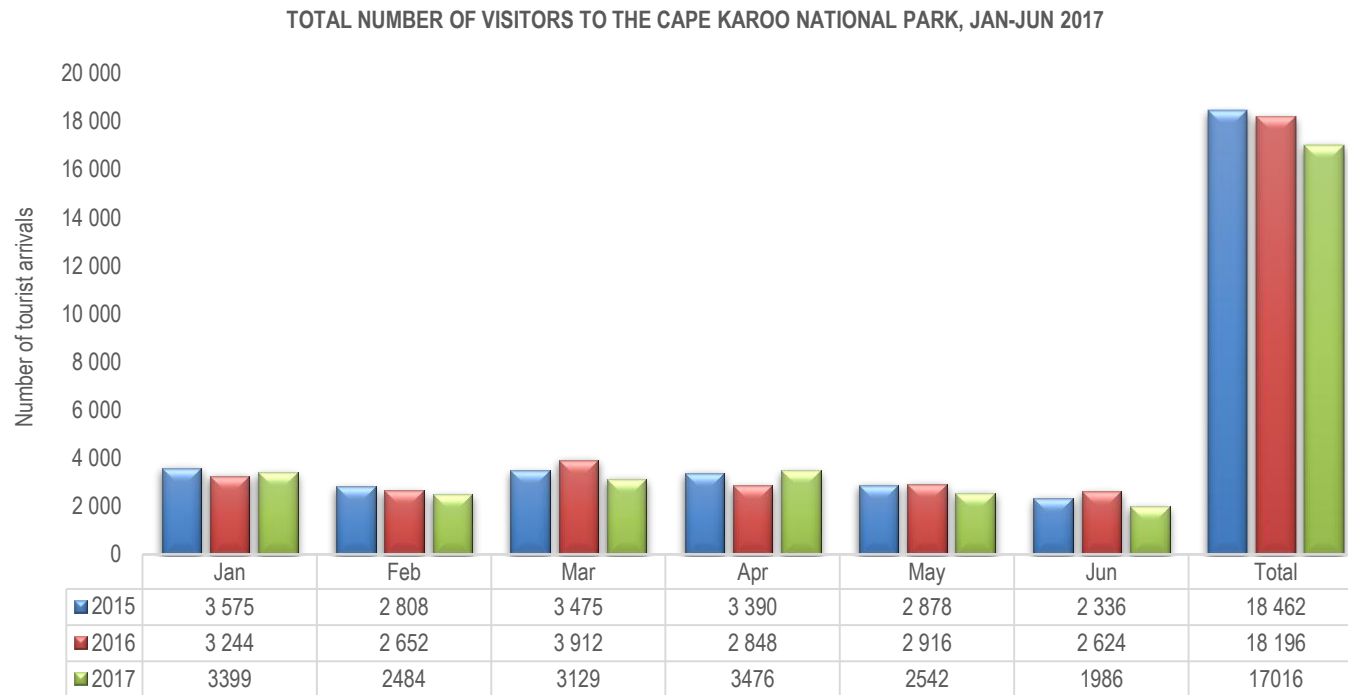
OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC SOURCE MARKET FOR THE CAPE KAROO, JAN-JUNE 2017				
TOURISM INDICATOR	Gauteng	Western Cape	Eastern Cape	KwaZulu-Natal
Main purpose of visit	Holiday/leisure (84.5%)	Holiday/leisure (88.0%)	Holiday/leisure (98.5%)	Holiday/leisure (98.0%)
	VFR (14.8%)	VFR (24.8%)	VFR (6.8%)	VFR (2.0%)
	Business (12,5%)	Business (13,5%)	-	-
Most common travel group size	Pairs (45.6%)	Pairs (52.5%)	Pairs (42.2%)	Alone (21.9%)
	Alone (12.8%)	Alone (32.2%)		Pairs (12.3%)
Most common length of stay per town	1 night (78.9%)	1 night (41.3%)	1 night (48,6%)	1 night (45.9%)
		2 nights (25.7%)		2 nights (15,0%)
Most common mode of transport	Rented car (64.7%)	Own motor vehicle (52.0%)	Rented car (66.7%)	Rented car (48.5%)
	Own motor vehicle (30.2%)	Rented car (22.7%)	Long distance bus (5,5%)	Own motor vehicle (52.0%)
Top information sources	Word of mouth (61.9%)	Word of mouth (67.9%)	Word of mouth (47.9%)	Word of mouth (27.9%)
	Return visit (22.5%)	Internet/websites (39.7%)	Internet/websites (19.7%)	Internet/websites (20.7%)
Top three activities undertaken	Culture/heritage (56.3%)	Culture/heritage (32.5%)	Scenic drives (24.5%)	Scenic drives (41.5%)
	Scenic drives (24.5%)	Outdoor activities (29.6%)	Karoo lamb (10,5%)	Astro Tourism (3,6%)
	Karoo lamb (10,3%)	Astro Tourism (5,2%)	Outdoor activities (9.6%)	Karoo lamb (4,2%)

6. Cape Karoo Towns

OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, JAN-JUNE 2017		
TOURISM INDICATOR	Laingsburg	Beaufort West
% Share overseas	12,0%	4,9%
% Share domestic	88.0%	95.1%
Top domestic markets	Western Cape (65.3%)	Western Cape (63.1%)
	Gauteng (27.5%)	Gauteng (25.5%)
	Eastern Cape (10.3%)	Eastern Cape (10,5%)
Main purpose of visit	Holiday/leisure (86.5%)	Holiday/leisure (78.2%)
	VFR (11.3%)	Business (12.6%)
Most common travel group size	Pairs (45.7%)	Pairs (85.4%)
	Alone (27.5%)	Alone (27.8%)
Most common length of stay per town	1 night (73.5%)	1 night (59.0%)
	2 nights (10.8%)	2 nights (25.9%)
Most common mode of transport	Rented Car (63.4%)	Own Motor Vehicle (73.2%)
	Own Motor Vehicle (32.5%)	Long distance bus (25,2%)
Top information sources	Word of mouth (22.2%)	Internet/websites (52.2%)
	Internet/websites (24.3%)	Word of mouth (43.2%)
Top three activities undertaken	Culture/heritage (78.7%)	Culture/heritage (69.6%)
	Outdoor activities (35.6%)	Outdoor activities (20.6%)
	Scenic drives (25.5%)	Scenic drives (15.5%)

7. Cape Karoo Attractions

- The Cape Karoo National Park received 17 016 visitors between January and June 2017, when compared to the previous years there was slight decline.
- Amongst all three years the National Park receive the most visitors in 2015 between January and June.



8.Acknowledgements

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The participating local tourism offices in the Cape Karoo Region:

- Laingsburg Tourism
- Beaufort West Tourism

SA National Parks Board

- Karoo National Park

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