Cape Overberg Visitor Trends

WESGRO
cape town & western cape
research

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Contents

1. Methodology

This report provides an overview of the tourism trends and patterns in the Cape Overberg. 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.*

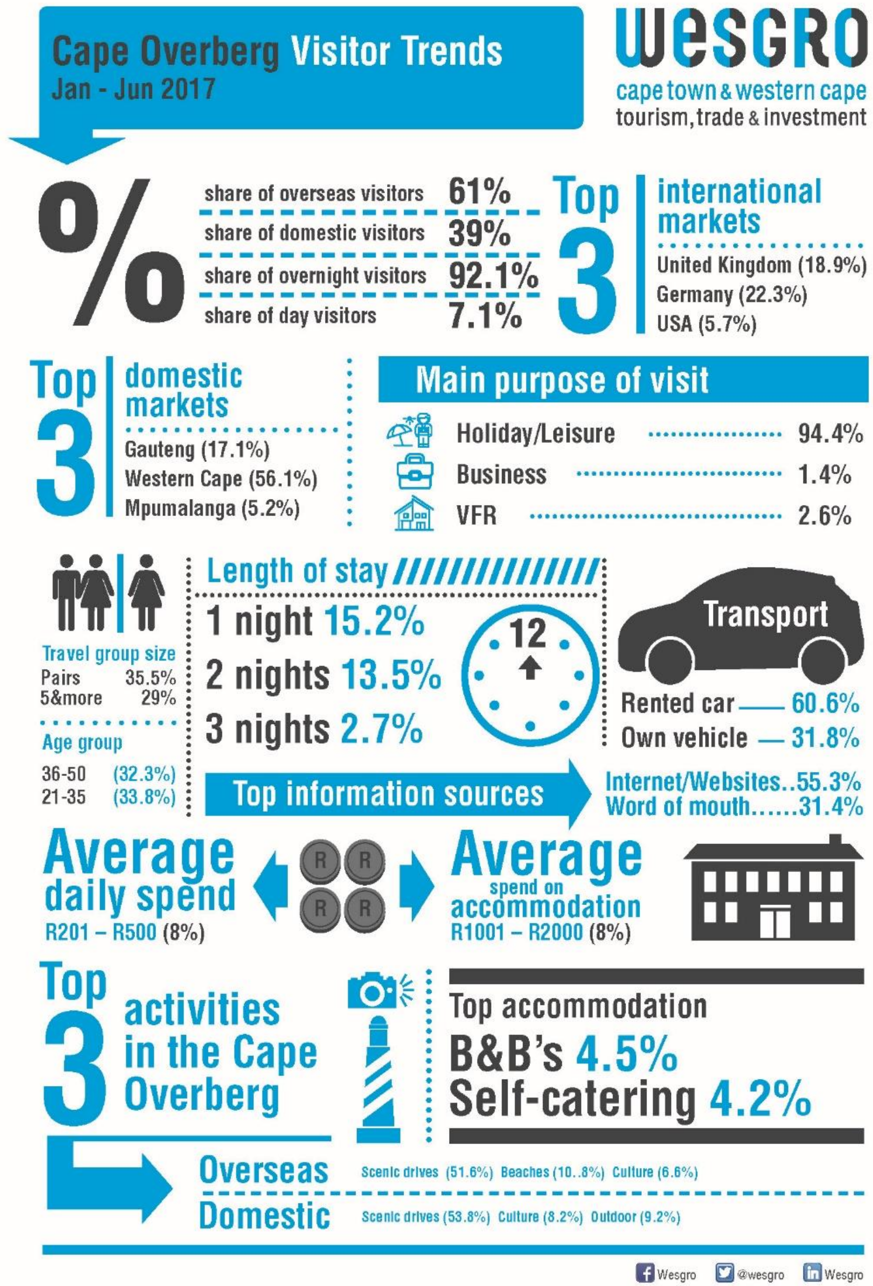
2. Participation and sample size

Between January and June 2017, a total of **5594** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Overberg. The participating Tourism Offices were:

Hangklip/Kleinmond	168
Swellendam	53
Stanford	415
Gansbaai	164
Caledon	71
Hermanus	220
Bredasdorp	525
Barrydale	408
Villiersdorp	98
Cape Agulhas	3472

3. Executive Summary

- Cape Overberg received 61,0% overseas visitors and 39,0% domestic visitors illustrating that majority of visitors to the region are your international visitors.
- Cape Overberg received 92,1% of overnight visitors making positive contribution to the accommodation sector.
- The region received very low percentage share of day visitors with 7,1% for the period under review.
- The top international markets to the region were United Kingdom (18,9%) Germany (22,3%) and the United States (5,7%).
- More than 50% of visitors to the Cape Overberg came from the European region during 2016.
- One night (15,2%) was the highest length of stay for visitors to the Cape Overberg, which could be your business tourists followed by two nights (13,5%) and three nights (2,7%).
- Both the overseas and domestic market enjoyed scenic drives and culture & heritage as their main activities within the region.
- Over 90% of visitors came for holiday showcasing the region as favorable holiday destination.
- Rented car (60,6%) and own motor vehicle (31,8%) was the chosen method of transport to the region.
- Internet/websites (55,3%) and word of mouth (31,4%) was main sources of information used to gather information on the region.
- The region had average daily spend of R201-R500 daily spend contributing positively to the economy of the Cape Overberg.
- R1001-R2000 was the highest percentage share spend on accommodation, which contributes positively to the accommodation sector of the region.
- Visitors to the Cape Overberg enjoyed staying at self catering units and B&Bs preferably.
- Therefore, the high percentage of overnight visitors in the region during this time has positively boosted job creation and other employment opportunities in the region.

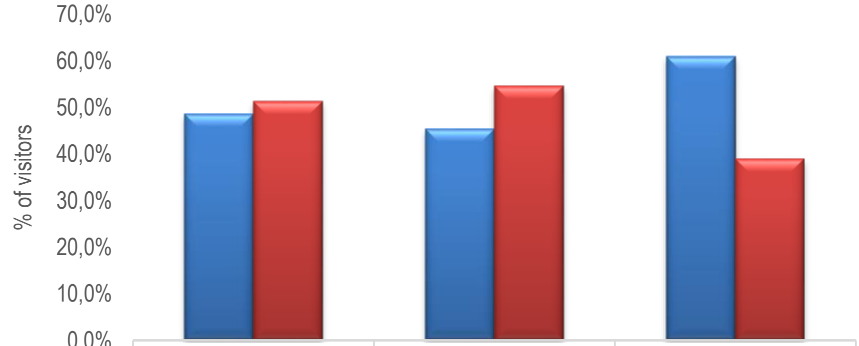


4. Cape Overberg Trends & Patterns

4.1 Origin of visitors

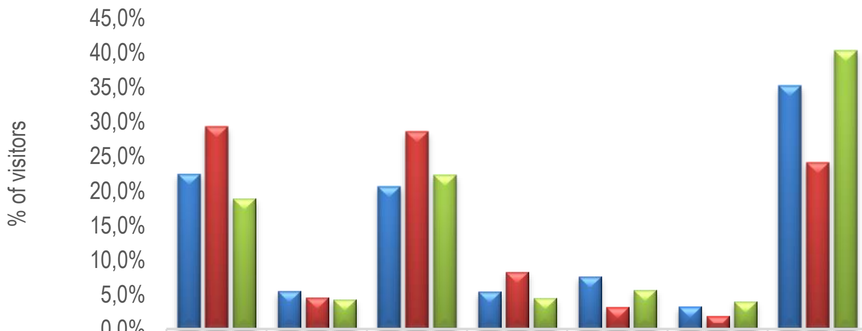
- Cape Overberg received the highest percentage of overseas visitors in January to June 2017 when compared to the previous years.
- Top markets to the region illustrated Europe maintained its position as the Cape Overberg's strongest performing region for each year 2015-2017.
- Traditional markets such as the United Kingdom and Germany ranked as the region's top two international countries followed by Netherlands and France. The other includes smaller sample of countries into the Cape Overberg.
- From 2015-2017 the Western Cape market consistently led domestic travel into the Cape Overberg, 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 OVERBERG, JAN-JUN 2017



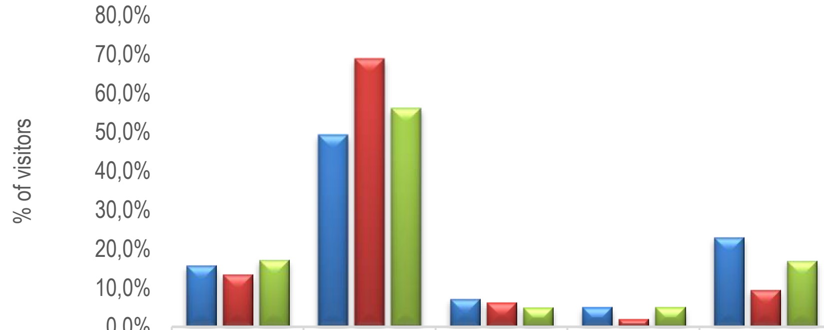
	Jan-Jun 2015	Jan-Jun 2016	Jan-Jun 2017
overseas	48,6%	45,4%	61,0%
domestic	51,4%	54,6%	39,0%

TOP OVERSEAS MARKETS TO THE CAPE OVERBERG, JAN-JUN 2017



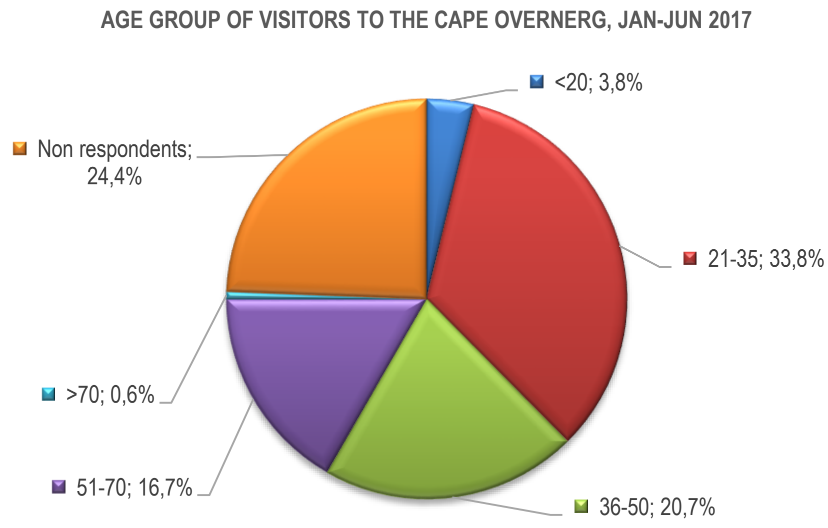
	United Kingdom	France	Germany	Netherla nds	United States	Italy	Other
Jan-Jun 2015	22,4%	5,5%	20,6%	5,4%	7,6%	3,3%	35,2%
Jan-Jun 2016	29,3%	4,6%	28,6%	8,3%	3,2%	1,9%	24,1%
Jan-Jun 2017	18,9%	4,3%	22,3%	4,5%	5,7%	4,0%	40,3%

TOP DOMESTIC MARKETS TO THE CAPE OVERBERG, JAN-JUN 2017

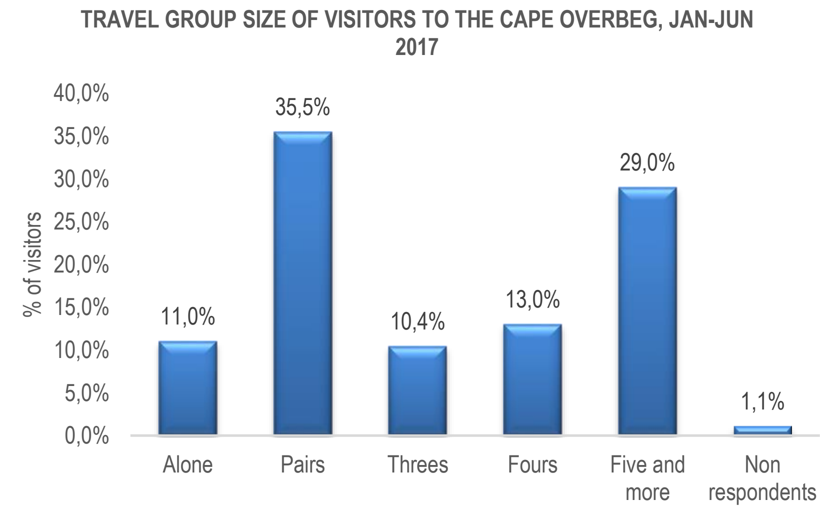


	Gauteng	Western Cape	Eastern Cape	Kwa-Zulu Natal	Other
Jan-Jun 2015	15,7%	49,3%	7,1%	5,0%	22,9%
Jan-Jun 2016	13,4%	68,8%	6,3%	2,0%	9,5%
Jan-Jun 2017	17,1%	56,1%	4,9%	5,0%	16,9%

3.2 Age group

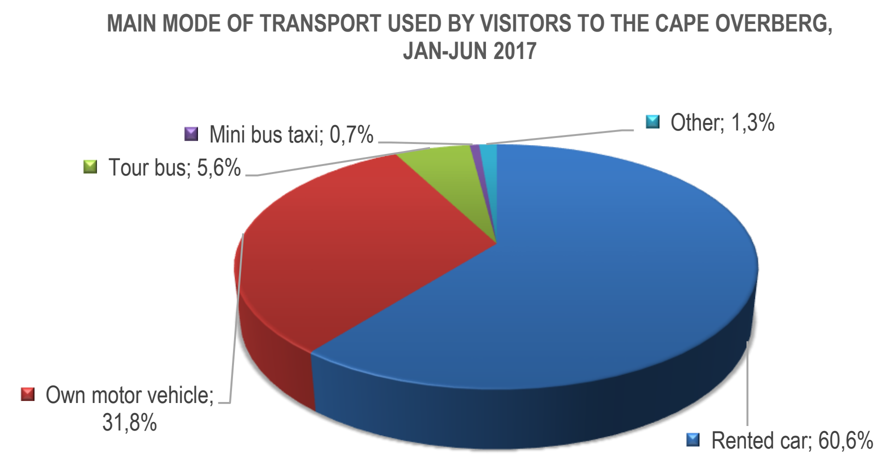


3.3 Group size

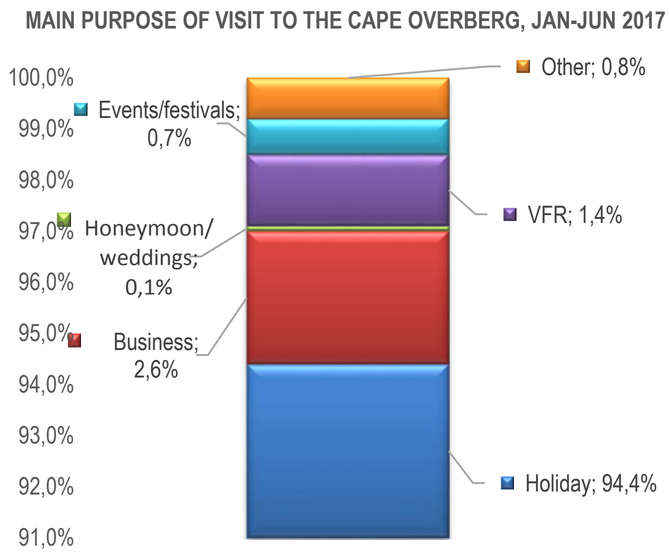


- The age groups (21-35 years) 33,8% was the most popular age group amongst all visitors to the region.
- The travel group size revealed that visitors to the region enjoyed travelling in pairs (35,5%), which could be your couples or friends.
- Travelling in groups of five and more (29,0%) to the region was also popular amongst visitors, which could be your tour groups.
- Based on surveys received by the tourism offices of the region the majority stated that own motor vehicle (31,8%) and rented car (60,6%) was the most favourable mode of transport used by visitors to the Cape Overberg.

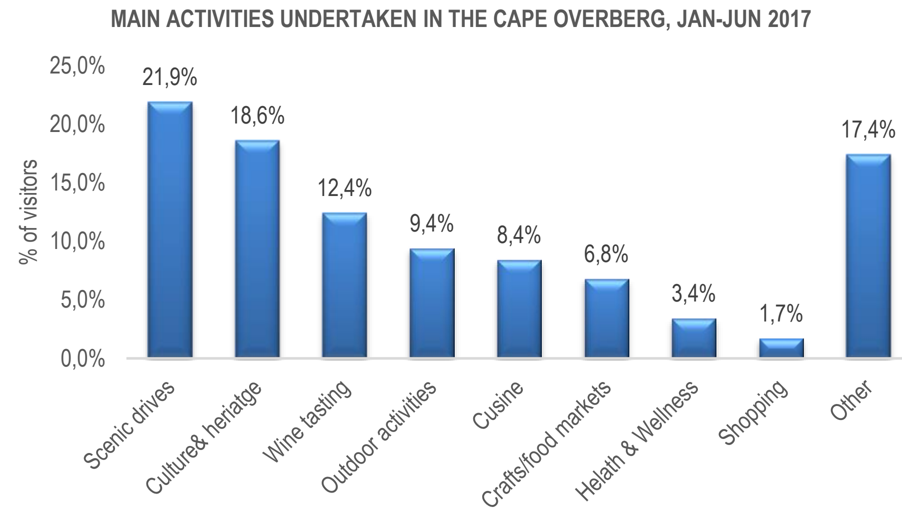
3.4 Mode of transport



3.5. Purpose of visit



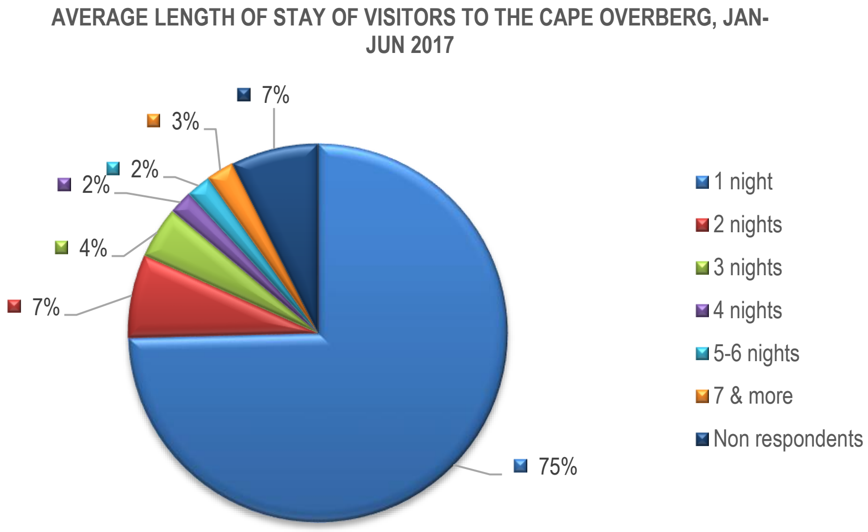
3.6. Main activities



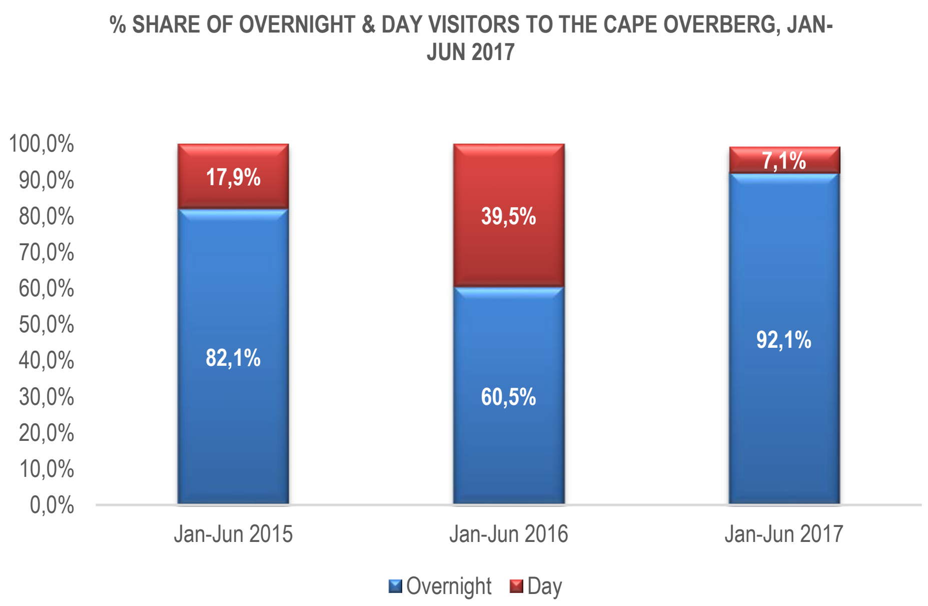
- The trends revealed that holiday/leisure ranked as the main motivation for travel to the Cape Overberg with percentage share of 94,4%.
- Visitors to the region also came for business 2,6% and visiting friends and family 1,4%.
- Scenic drives (21,9%) was most popular activity undertaken by visitors to the Cape Overberg, followed by Culture/heritage (18,6%), wine tasting (12,4%), outdoor activities (9,4%) and cuisine (8,4%).
- Surprisingly, visitors to the Cape Overberg also enjoyed activities around health and wellness.

3.7 Length of stay

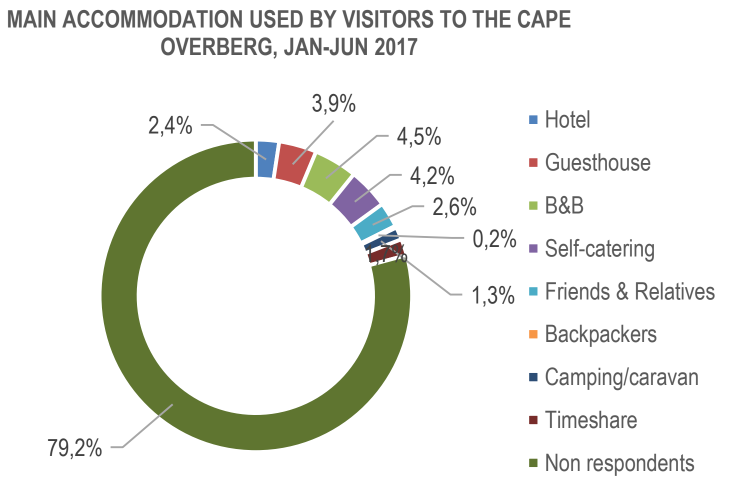
- The majority of the visitors to the Cape Overberg stayed for one night to two nights.
- The trends revealed a strong share of overnight visitors 92,1% than day visitors 7,1%, which contributes positively to the accommodation establishments within the Cape Overberg.
- B&Bs and self catering ranked most popular accommodation categories used by visitors to the region.



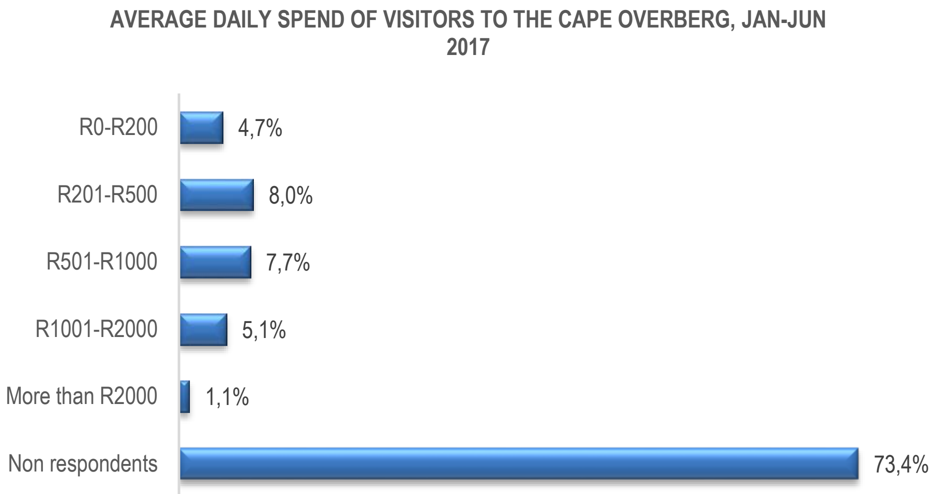
3.8 Overnight stay



3.9 Accommodation used by visitors



3.10 Average daily spend



- The highest average daily spend was R201-R500 (8,0%).
- Internet/websites (55,3%) and word of mouth (31,4%) were the most popular source of information used.
- Amongst all visitors to the region the highest expenditure range on accommodation was R1001-R2000 (8,0%).

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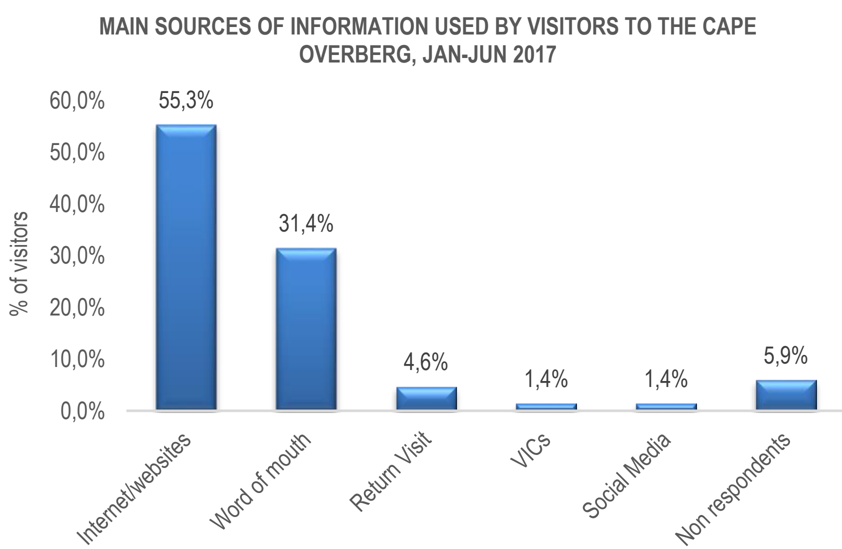
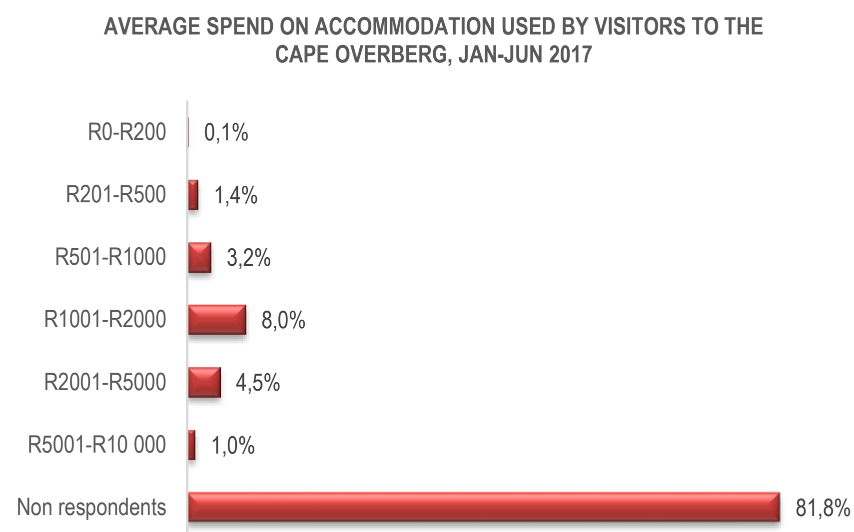
3.11 Information sources used



3.12 Average spend on accommodation



5. Profile/Snapshot of overseas and domestic market

OVERVIEW OF OVERSEAS & DOMESTIC VISITOR TRENDS AND PATTERNS, JAN-JUNE 2017		
TOURISM INDICATOR	**OVERSEAS**	**DOMESTIC**
Age group	21-35 (30.5%)	21-35 (35.9%)
	36-50 (27.4%)	36-50(25.8%)
	51-70 (7.6%)	51-70 (6.1%)
Main purpose of visit	Holiday/leisure (95.7%)	Holiday/leisure (85.5%)
	Business (1.5%)	Business (9.0%)
	Events (1.1%)	Education (4.1%)
Most common travel group size	Pairs (55.8%)	Alone (52.1%)
	Alone (19.1%)	Pairs (34.8%)
Most common length of stay	2 nights (32.9%)	1 night (50.8%)
	3 nights (21.5%)	2 nights (14.9%)
Most common mode of transport	Rented car (51.0%)	Rented car (17.6%)
	Own Motor Vehicle (26.9%)	Own Motor Vehicle (81.5%)
Top information sources	Word of mouth (53.5%)	Word of mouth (53.5%)
	Internet/websites (14.5%)	Internet/websites (14.5%)
Average daily spend	R501-R1000 (40.9%)	R501-R1000 (40.9%)
Type of accommodation	Hotel (26.7%)	Self-catering (42.6%)
	Self-Catering (21.2)	B&B (43.6%)
Average spend on accommodation	R501-R1000 (39.0%)	R501-R1000 (29.0%)
Top three activities undertaken	Scenic drives (19.6%)	Culture/heritage & Scenic drives (29.0% each)
	Gourmet restaurants (11.7%)	Outdoor Activities (12.0%)
	Outdoor Activities (17.5%)	Gourmet restaurants (9.1%)

6. Profile/Snapshot of top international markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL MARKET, JAN-JUNE 2017

TOURISM INDICATOR	United Kingdom	Germany	Netherlands	United States
Main purpose of visit	Holiday/leisure (100.0%)	Holiday/leisure (98.9%)	Holiday/leisure (100.0%)	Holiday/leisure (100.0%)
Most common travel group size	Pairs (57.7%) Alone (18.2%)	Pairs (59.5%) Threes (15.2%)	Pairs (55.7%) Alone (19.2%)	Pairs (56.7%) Alone (19.2%)
Most common age group	21-35 years (25.6%)	57-70 years (37.5%)	21-35 years (35.6%)	21-35 years (35.6%)
Most common length of stay	2 nights (35.4%) 3 nights (22.7%)	1 night (25.9%) 2 nights (27.8%)	2 nights (36.4%) 3 nights (22.7)	2 nights (36.4%) 1& 3 nights (22.7%)
Most common mode of transport	Rented car (97.7%)	Rented car (76.9%)	Rented car (97.7%)	Rented car (97.7%)
Top information sources	Internet/websites (51.4%)	Word of mouth (28.6%) Internet/websites (42.9%)	Internet/websites (51.4%) -	Internet/websites (51.4%) -
Most common type of accommodation	B&B (38.7%)	-	B&B (38.7%)	B&B (38.7%)
Top three activities undertaken	Culture & Heritage (11.8%) Outdoor activities (16.7%) Scenic Drives (21.6%)	Culture & Heritage (17.5%) Scenic drives (16.7%) Outdoor activities (15.8%)	Culture & Heritage (11.8%) Outdoor activities (16.7%) Scenic Drives (21.6%)	Culture & Heritage (11.8%) Outdoor activities (16.7%) Scenic Drives (21.6%)

7. Profile/Snapshot of top domestic markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC MARKET, JAN-JUNE 2017

TOURISM INDICATOR	Western Cape	Gauteng	Eastern Cape	Kwa-Zulu Natal
Main purpose of visit	Holiday/leisure (87.6%) Business (6.0%) Education (4.1%)	Holiday/leisure (88.0%) Business (7.0%)	Holiday/leisure (92.7%)	Holiday/leisure (92.7%)
Most common travel group size	Alone (54.6%) Pairs (29.9%)	Pairs (52.1%) Alone (22.3%)	Alone (15.4%) Pairs (61.5%)	Alone (15.4%) Pairs (61.5%)
Most common age group	36-50 years (58.5%)	36-50 years (42.9%)	21-35 years (25.6%)	21-35 years (15.6%)
Most common length of stay	1 night (38.7%) 2 nights (24.5%)	1 night (25.0%) 7 nights & More (23.4%)	1 night (48.7%) 2 nights (20,5%)	1 night (17.0%) 2 nights (30,5%)
Most common mode of transport	Own motor vehicle (89.3%) Rented car (7.7%)	Rented car (54.2%) Own motor vehicle (20.0%	Rented car (52.0%) Own motor vehicle (40.0%)	Rented car (52.0%) Own motor vehicle (40.0%)
Top information sources	Internet/websites (14.1%) Word of mouth (57.6%)	Word of mouth (37.1%)	Internet/websites (15.1%) -	Internet/websites (24.1%) -
Most common type of accommodation	Self-catering (50.8%) B&B (20.2%)	Self-catering (57.5%)	Self-catering (68.8%)	Self-catering (68.8%)
Top three activities undertaken	Culture & Heritage (11.0%) Scenic drives (28.0%) Outdoor activities (11.3%)	Crafts/food markets (11.5%) Scenic drives (23.9%) Outdoor activities (12.4%)	Scenic drives & Outdoor activities (18.2% each) -	Scenic drives & Outdoor activities (18.2% each) -

8. Cape Overberg Towns

OVERVIEW OF VISITOR TRENDS AND PATTERNS BY TOWN, JAN-JUNE 2017

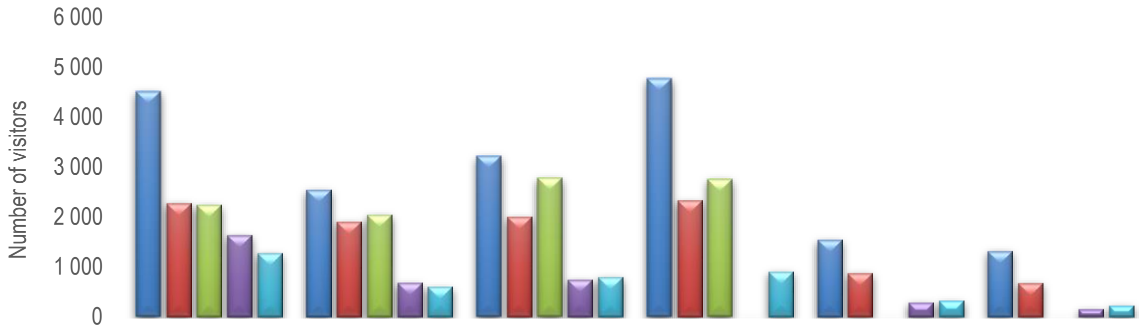
TOURISM INDICATOR	Hangklip/Kleinmond	Swellendam	Caledon	Barrydale	Bredasdorp
% Share overseas	34.8%	71.1%	35.8%	45.9%	27.4%
% Share domestic	62.0%	28.7%	63.3%	53.9%	72.1%
Top international markets	United Kingdom (20.0%) Germany (23.1%) United States (15.4%)	Germany (27.4%) United Kingdom (25.5%) Netherlands (15.8%)	United Kingdom (26.9%) Germany (21.8%)	United Kingdom (52.4%) Germany (25.3%) Australia (10.9%)	United Kingdom (38.8%) Germany (40.8%)
Top domestic markets	Western Cape (62.1%) Gauteng (9.5%) Eastern Cape (13.8%)	Western Cape (68.5%) Gauteng (17.0%) Eastern Cape & KZN (4.3%)	Western Cape (79.7%) Gauteng (12.3%)	Western Cape (61.7%) Eastern Cape (17.1%) Gauteng (18.6%)	Western Cape (75.2%)
Main purpose of visit	Holiday/leisure (55.9%) Business (6.5%)	Holiday/leisure (95.4%) Business (1.8%)	Holiday/leisure (92.6%)	Holiday/leisure (94.4%) Events/festivals (4.6%)	Holiday/leisure (69.8%) VFR (14.5%) Business (3.8%)
Most common travel group size	Pairs (28.7%) 5 & more (24.3)	Pairs (69.3%) Fours (11.4%)	Pairs (67.9%) Alone (24.8%)	Fours (39.9%) Pairs (25.9%)	5 & more (43.0%) Fours (25.7%)
Most common length of stay	2 nights &5-6 nights (19.0% each) 4 nights (21.6%)	1 night (39.2%) 2 nights (37.2%)	1 night (59.5%) 2 nights (26.2%)	1 night (46.9%) 2 nights (41.2%)	2 nights (27.8%)
Most common mode of transport	Own motor vehicle (30.6%) Rented car (26.7%)	Rented car (66.7%) Own motor vehicle (28.6%)	Own motor vehicle (61.9%) Rented car (36.2%)	Own motor vehicle (48.7%) Rented car (38.4%)	Rented vehicle (25.9%) Own motor vehicle (56.3%)
Top information sources	Internet/websites (20.7%) Word of mouth (14.7%)	Internet/websites (25.0%) Word of mouth (18.7%)	Return visits (38.5%) Internet/websites (35.3%)	Internet/websites (30.7%) Brochures (39.0%)	Return visits (40.6%) Word of mouth (18.9%)
Average daily spend	R1001-R2000 (32.2%)	R501-R1000 (41.9%)	R501-R1000 (44.4%)	R201-R500 (69.4%)	0-R200 (52.0%)
Type of accommodation	Self-catering (20.6%) B&B (15.5%)	B&B (29.7%) Guesthouse (30.7%)	B&B (36.5%) Self-catering (26.9%)	B&B (57.3%) Self-catering (36.0%)	Friends & Relatives (54.8%)
Average spend on accommodation	R2001-R5000 (44.6%)	R501-R1000 (38.0%)	R501-R1000 (39.0%)	-	R201-R500 (45.7%)
Top three activities undertaken	Outdoor activities (10.6%) Scenic drives (9.8%) Gourmet restaurants (7.5%)	Scenic drives (22.3%) Gourmet restaurants (15.2%) Outdoor activities (20.1%)	Scenic drives (38.9%) Wine tasting (12.7%) Health & wellness/spas (13.3%)	Wine tasting (18.2%) Scenic drives (31.3%) Outdoor activities (14.7%)	Culture/heritage (57.4%) Scenic drives Meetings/incentives (11.6% each) Expos/exhibitions (8.4%)

OVERVIEW OF VISITOR TRENDS AND PATTERNS BY TOWN, JAN-JUNE 2017

TOURISM INDICATOR	Villiersdorp	Stanford	Gansbaai	Hermanus	Cape Agulhas
% Share overseas	23.7%	50.6%	70.7%	66.4%	50.6%
% Share domestic	76.3%	49.4%	28.1%	32.7%	45.4%
Top international markets	Germany (27.3%)	Germany (37.4%) United Kingdom (36.3%)	Germany (39.2%) Netherlands (12.4%) United Kingdom (11.3%)	United Kingdom (22.2%) Germany (23.6%) Netherlands (10.4%)	Germany (87.4%) United Kingdom (16.3%)
Top domestic markets	Western Cape (81.4%) Gauteng (10.2%)	Western Cape (57.4%) Gauteng (23.0%)	Western Cape (44.9%) Gauteng (39.1%)	Western Cape (62.5%) Gauteng (18.8%)	Western Cape (37.4%) Gauteng (13.0%)
Main purpose of visit	Holiday/leisure (75.0%) Business (12.1%) VFR (7.3%)	Holiday/leisure (96.7%)	Holiday/leisure (96.6%)	Holiday/leisure (84.7%)	Holiday/leisure (86.7%)
Most common travel group size	Pairs (55.2%) Alone (27.6%)	Pairs (65.4%) Fours (12.8%)	Pairs (65.7%) Fours (11.7%)	Pairs (62.9%) Alone (16.8%)	Pairs (55.4%) Fours (32.8%)
Most common length of stay	2 nights (29.5%) 1 night (24.6%)	2 night (28.1%) 3 nights (21.9%)	2 nights (27.6%) 1 night (26.7%)	2 nights (33.9%) 1 night (24.7%)	2 night (28.1%) 3 nights (11.9%)
Most common mode of transport	Own motor vehicle (69.9%) Rented vehicle (30.1%)	Rented car (49.7%) Own motor vehicle (46.3%)	Rented car (70.2%) Own motor vehicle (28.5%)	Own motor vehicle (28.8%) Rented car (58.7%)	Rented car (39.7%) Own motor vehicle (26.3%)
Top information sources	Own motor vehicle (25.5%) Internet/websites (19.1%)	Word of mouth (31.5%) Internet/websites (26.8%)	Internet/websites (29.1%) Word of mouth (32.3%)	Internet/websites (26.4%) Word of mouth (34.1%)	Word of mouth (41.5%) Internet/websites (36.8%)
Average daily spend	Word of mouth (52.3%)	R1001-R2000 (31.4%)	R501-R1000 (37.7%)	R201-R500 (36.2%)	R1001-R2000 (41.4%)
Type of accommodation	R501-R1000 (27.7%) B&B (53.2%)	Self-catering (38.5%) B&B (21.5%)	B&B (23.2%) Guesthouse (23.7%)	Hotel (20.9%) Guesthouse (18.6%)	Self-catering (28.5%) B&B (51.5%)
Average spend on accommodation	Guesthouse (33.5%)	R501-R1000 (33.8%)	R501-R1000 (36.2%)	R501-R1000 (34.9%)	R501-R1000 (63.8%)
Top three activities undertaken	R501-R1000 (36.2%) Meetings/incentives (24.2%) Scenic drives (17.9	Outdoor activities (15.7%) Scenic drives (29.1) Gourmet restaurants (12.0%)	Scenic drives (22.5%) Whale watching (16.2%) Beaches (15.4%)	Scenic drives (12.5%) Whale watching (19.6%) Outdoor activities (15.2%)	Outdoor activities (35.7%) Scenic drives (28.1) Gourmet restaurants (15.0%)

9. Cape Overberg Attractions

TOTAL NUMBER OF VISITORS TO NATIONAL PARKS & RESERVES OF THE CAPE OVERBERG, JAN-JUN 2017



	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
Agulhas National Park	4 518	2 540	3 225	4 773	1 542	1 314
Bontebok National Park	2 276	1 905	1 996	2 329	871	673
De Hoop Nature Reserve	2 241	2 041	2 783	2 755	0	0
De Mond Nature Reserve	1 628	676	737	0	283	144
Kogelberg Nature Reserve	1 267	601	794	904	318	220

- When analysing the trend of visitors to the National Parks and Game Reserves the first quarter of 2017 indicated a positive number of visitors to the National parks and reserves compared to the second quarter, which could be due to the off peak season.

- When analysing the trend of visitors to the attractions in the Cape Overberg there was positive number of visitors to these attractions from January to April 2017, however there was slight decline in visitors between May and June 2017.

TOTAL NUMBER OF VISITORS TO THE CAPE OVERBERG ATTRACTIONS, JAN-JUN 2017

	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
Cape Agulhas Lighthouse	4 060	2 156	2 698	4 251	1 302	1 383
Harold Porter National Botanical Garden	8 822	4 849	5 699	7 172	3 014	1 897
Stony Point	6 694	6 695	6 678	6 655	3 548	2 651

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 Overberg:

- Barrydale Tourism
- Bredasdorp Tourism
- Caledon Tourism
- Gansbaai Tourism
- Hangklip/Kleinmond Tourism
- Hermanus Tourism
- L'Agulhas Tourism
- Stanford Tourism
- Swellendam Tourism
- Villiersdorp Tourism

The participating indicators and attractions in Cape Overberg:

- Agulhas National Park
- Bontebok National Park
- Cape Agulhas Lighthouse
- De Hoop Nature Reserve
- De Mond Nature Reserve
- Harold Porter Botanical Gardens
- Kogelberg Nature Reserve
- Stony Point

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