



Weskus Regional Trends

WESGRO
cape town & western cape
research

January to June 2017

An inspiring place to know

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1. Methodology

- This report provides an overview of the tourism trends and patterns in the Weskus. 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 **2,773** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Weskus. The participating Tourism Offices were:

Darling	776
Paternoster	597
Langebaan	347
Vredenburg	218
Velddrif	193
Porterville	104
Yzerfontein	99
Vredendal	92
Clanwilliam	89
Vanrhynsdorp	88
Piketberg	87
Goedverwacht	53
Lamberts Bay	30

3. Executive Summary

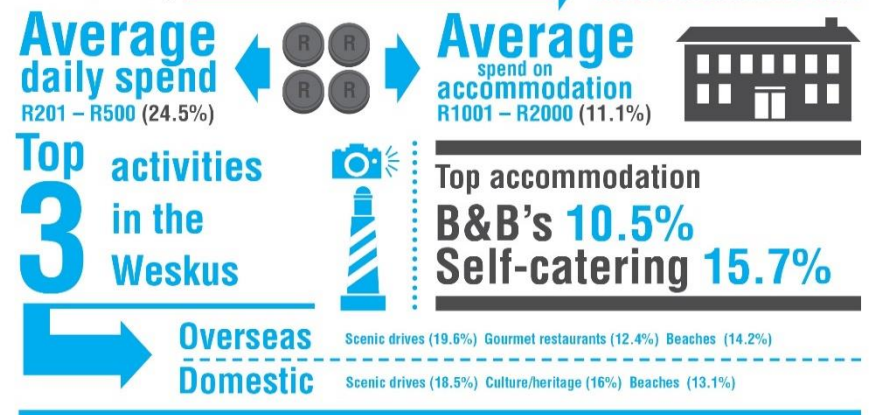
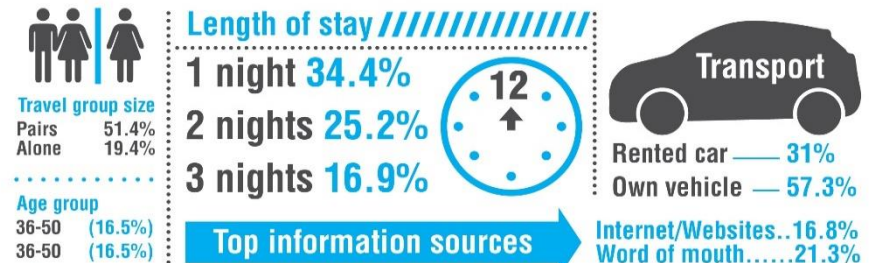
- The Weskus region stretches from the border of Cape Town Metropole to the border of the Northern Cape. The region covers a total area of 31 099 km². The population lives in towns and villages either along its rugged coast or off the N7, the main road link between the Cape and Namibia. The region also boasts one of the safest deep-water ports in the southern hemisphere at Saldanha Bay.
- The Weskus District Municipality comprises of five local municipalities: Swartland, Berggrivier, Matzikama, Cederberg and Saldanha Bay. The municipalities are well run and committed to support investment and economic growth as a priority.
- As a collective, tourism offices based within these municipalities welcomed a share of 31.9% international travellers and 68.0% from the domestic market. The United Kingdom (28.7%), Germany (25.9%) and Netherlands (10.3%) ranked as the region's top three international markets between January and June 2017. The domestic market were led by travellers from the Western Cape (64.4%) and Gauteng (17.5%).
- Holiday/leisure ranked as the strongest driver for travel to the region, with over 70% of visitors mainly travelling for leisure. Business (3.5%) followed as the second largest share of travellers. With the growing MICE (Meetings, Incentives, Conferences and Exhibitions) sector, this is an important segment which can positively contribute to regional spread and seasonality patterns.
- The most common age profile of visitors to the Weskus were between 36-50 (16.5%) and 51-70 (16.5%) years. Visitors mainly travelled in pairs (51.4%) and 19.4% of visitors were solo travellers.
- Over 50% of respondents to the Weskus towns indicated overnight stays, of which most stayed for an average of one (34.4%), two (25.2%) and three nights (16.9%).
- Paid accommodation establishments held a strong demand across the period, led by self-catering (15.7%), B&Bs (10.5%) and guesthouses (9.4%). Visitors spent an average of R1001-R2000 (11.1%) per day on accommodation in the region.
- Word of mouth (21.3%) and internet/websites (16.8%) ranked as the leading information sources used by visitors to obtain information on the destination.
- Between January and June 2017, visitors spent on average R201-R500 (24.5%) per day in the region. The top five activities enjoyed during the period included scenic drives (18.9%), beaches (13.5%), culture/heritage (13.5%), gourmet restaurants (12.1%) and outdoor activities.

Weskus Visitor Trends

Jan - Jun 2017



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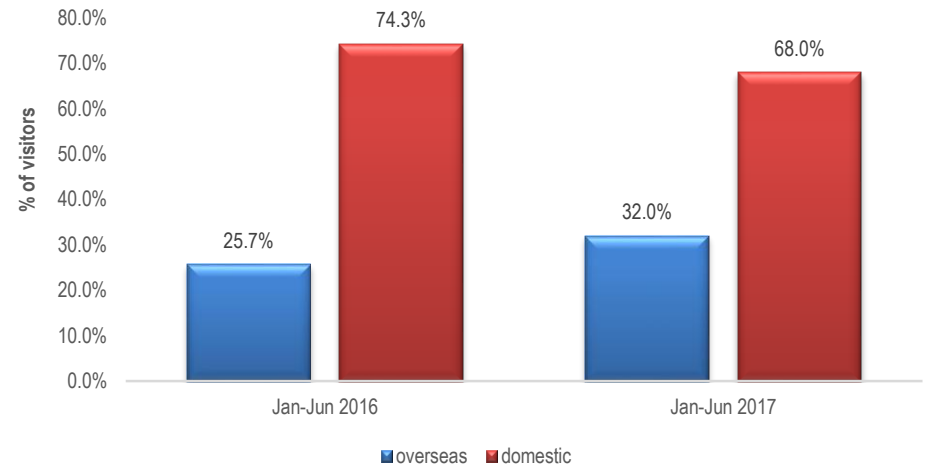


4. Weskus Visitor Trends & Patterns

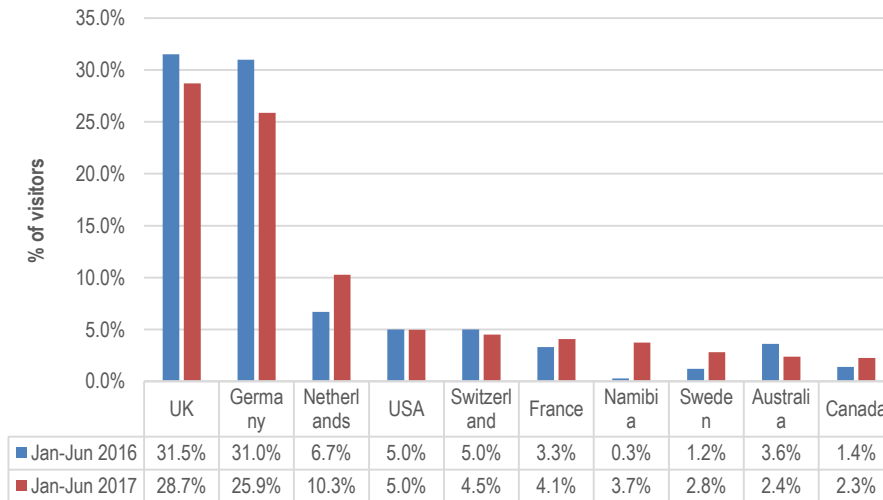
4.1 Origin of Visitors

- The strong flow of travel from the domestic market is largely attributed to the close proximity of the region to Cape Town. This makes the region a particularly favourable weekend getaway destination for the domestic market.
- In addition, the launch of the new West Coast Way tourism routes earlier this year translated into an even greater share of travellers making their way to the region.
- Across the period under review, Germany, United Kingdom and the Netherlands ranked as the top international markets to the Weskus.
- Trends further revealed that international travellers were still travelling to the Western Cape during the winter period, evident in their regional presence.

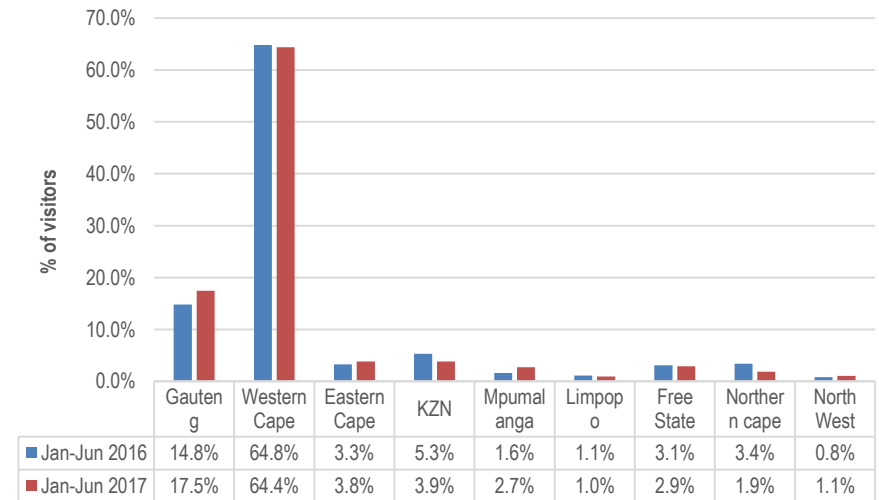
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE WESKUS TOWNS, JAN-JUN 2016/17



% SHARE OF OVERSEAS VISITORS TO THE WESKUS, JAN-JUN 2016/17

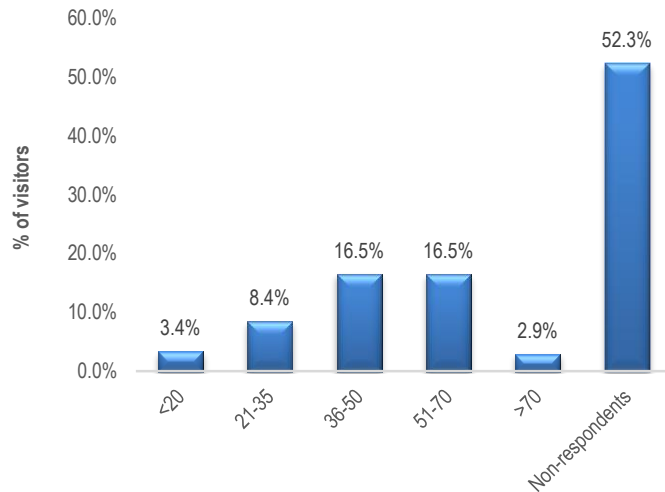


% SHARE OF DOMESTIC VISITORS TO THE WESKUS, JAN-JUN 2016/17



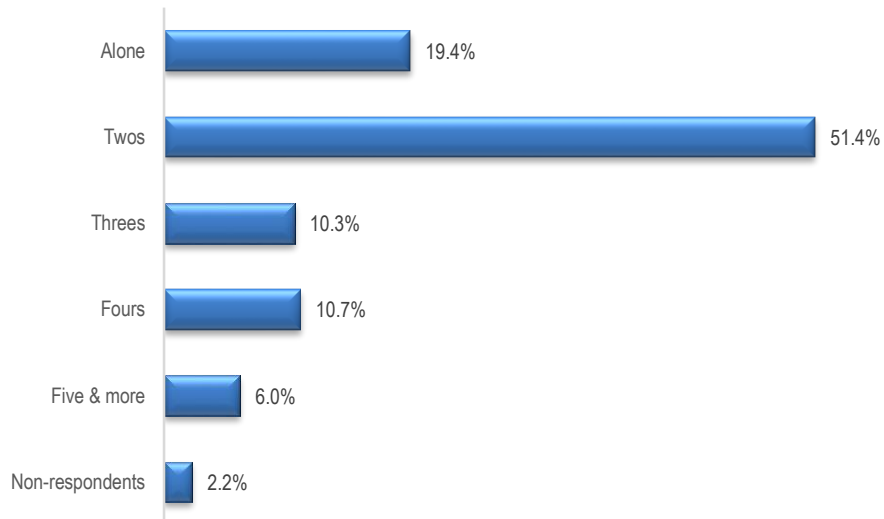
4. Weskus Trends and Patterns

4.2 Age Profile of Visitors

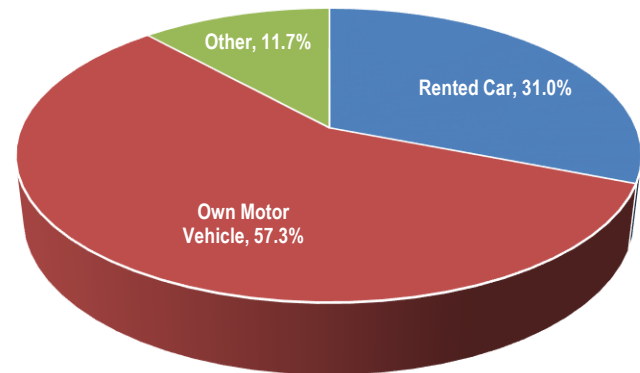


- By category, the age groups 36-50 and 51-70 years dominated as the most prominent groups amongst visitors to the Weskus. However, collectively, the region welcomed a larger share from the youth market, indicating the level of diversity tourism marketers should offer potential markets.
- Travelling in pairs or/as couples (51.4%) ranked as the most prominent travel group size. Followed by 19.4% who travelled alone.
- By market, the domestic travellers mainly travelled with their own motor vehicles while rented vehicles were primarily utilised by the international market.
- This trend comes as no surprise with scenic drives ranking as the top activity enjoyed by the domestic market. With ease of travelling time the Weskus is a popular region for day trips.

4.3 Travel Group Size



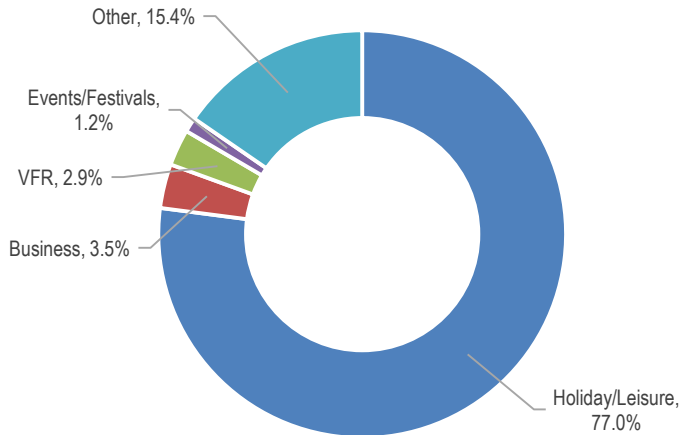
4.4 Mode of Transport



*Other: Includes public transport, long distance bus, mini bus taxi, shuttle service, tour bus, motorbike and metered taxis.

4. Weskus Trends and Patterns

4.5 Main Purpose of Visit

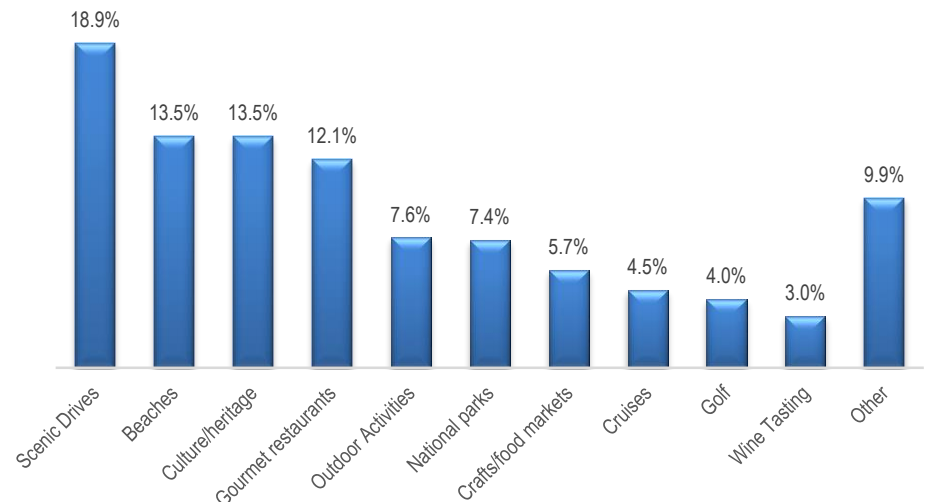


**Other: Includes travel for honeymoon/weddings, education, sport, medical, religion and seasonal/migrant worker.*

- Culture/heritage ranked amongst the top three activities enjoyed by travellers to the Weskus. The region has worked very hard in sustaining their vibrant and rich cultural product over the years. At the prominent !Kwa ttu travellers can experience the san culture, on the mission stations the old way of life and in the quaint fishing villages the region protects its established fishing trade.
- Gourmet restaurants and cultural food adventures definitely ranks as a popular leisure activity in the Weskus. The region boasts Paternoster, one of the coastal towns which have emerged as a culinary hotspot with around fifteen restaurants.
- The strong link between the tourism offerings and the local culture of the Weskus community translates into a unique tourism product for this region.

- Despite the period under review only including the last three months of the peak season (Jan-Mar), it is evident that international visitors have been staying for longer periods in the Western Cape. This is evident in the consecutive growth the province has been experiencing in tourist arrivals during the 2016 winter period.
- Weskus attractions have also seen a jump in visitors during April, this is largely due to Easter holidays which fell in April instead of March in 2017.
- The Weskus features eight 3-day routes which highlights the unique attractions the region has to offer; ranging from flowers, whales, adventure, cultural/mission stations, birds and three wine routes. The diversity in tourism products confirms the strength in the region's leisure market.

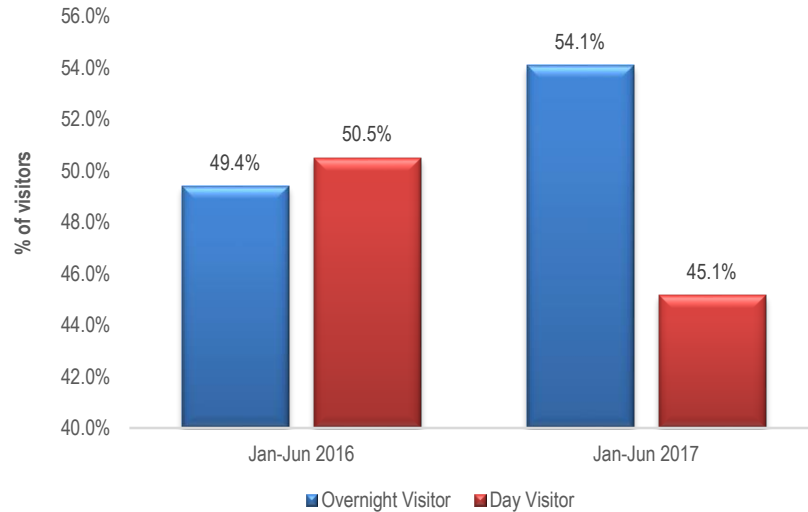
4.6 Top Activities Undertaken in the Weskus



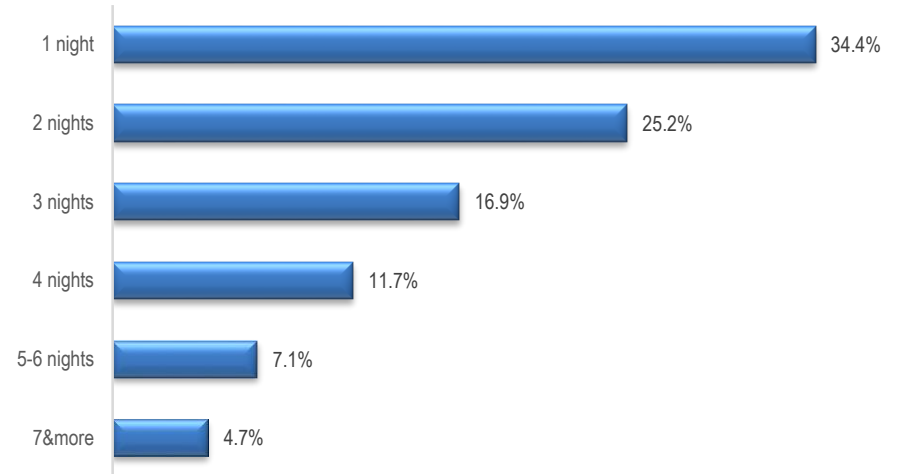
**Other: Includes adventure, whale watching, golf, fishing, gambling, expos/exhibitions, sport events/spectator, astro tourism, health & wellness/spas, shopping, game reserves, and cruises.*

4. Weskus Trends and Patterns

4.7 Overnight vs. Day Visitors

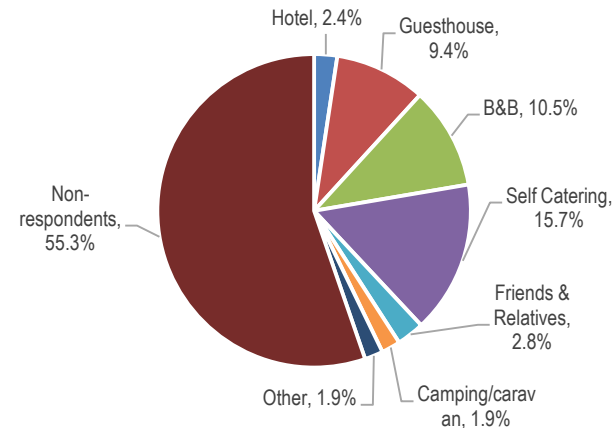


4.8 Average Length of Stay



- Between January and June 2017, over 50% of respondents indicated overnight stays in the region. Of these visitors, most stayed for an average of one (34.4%), two (25.2%) and three (16.9%) nights.
- Over 10% of respondents indicated longer stays of 5-6 nights and up to a week, indicating that the region not only caters for weekend getaways, but also holds a solid share of travellers who enjoyed extended stays in the region.
- The region's paid accommodation establishments held a higher preference amongst respondents. The top three preferred accommodation choices included self-catering (15.7%), B&Bs (10.5%) and guesthouses (9.4%).

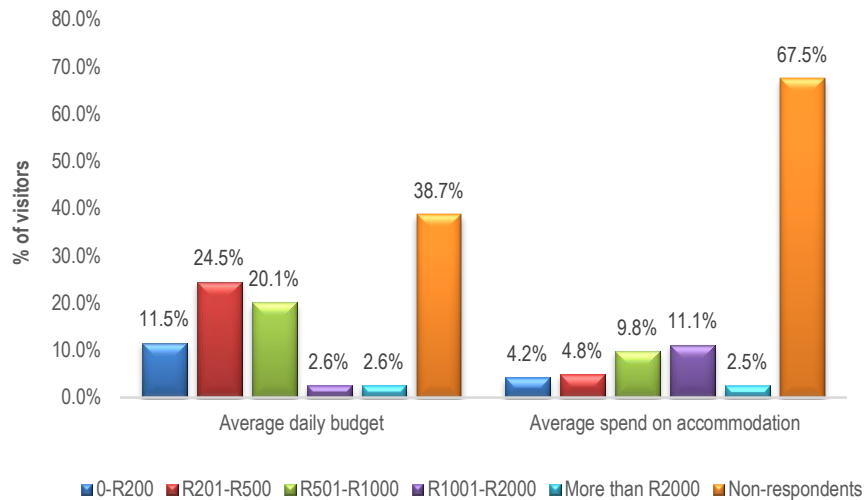
4.9 Accommodation Usage



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

4. Weskus Trends and Patterns

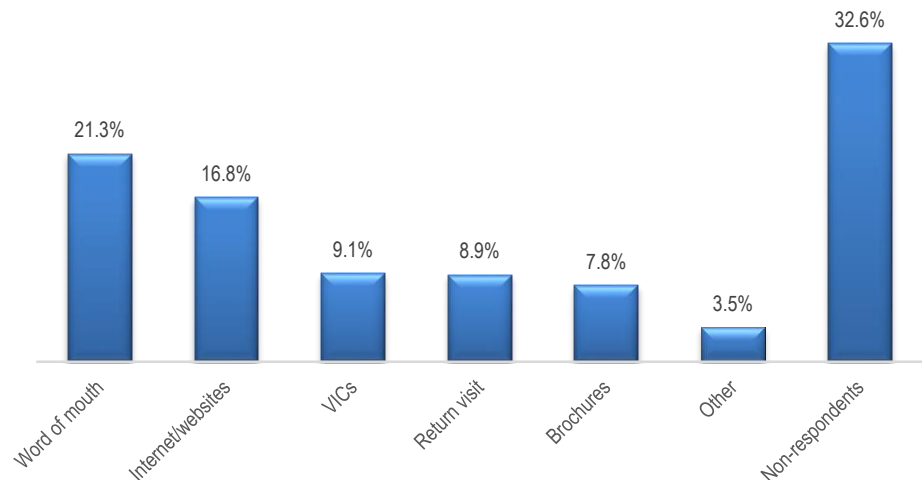
4.10 Average Spend in the Weskus



- An average of R501-R1000 and R1001-R2000 emerged as the most common spending brackets for accommodation.
- Between January and June 2017, visitors spent on average R201-R500 and R501-R1000 per day in the region.
- The domestic market is not only the leading contributing market to the Weskus, but also adds significant value to the economy of the local tourism industry.
- According to the 2016 Domestic Tourism statistics released by Statistics South Africa (STATSSA), 99.2% of domestic day travellers and 69.9% of domestic overnight travellers to the Western Cape originated from the province. Despite economic challenges, the Western Cape domestic market continues to travel and spend within the province, sustaining the value of the local economy in each region.

- Word of mouth and internet/websites ranked as the top sources for obtaining information on the Weskus. VICs ranked as the third most popular information source, indicating that a demand still remains for tourism offices as an information tool.
- It is further important to note that the VICs play a more significant role once visitors are within their destination of choice and seek tourism guidance.
- 8.9% of respondents were return visitors, indicating the success of the promotion and awareness campaigns implemented by Wesgro and the Weskus tourism marketers.

4.11 Top Information Sources



5. Weskus Towns

OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, JAN-JUN 2017

Tourism Indicator	Velddrif	Langebaan	Paternoster	Darling	Vredenburg
% Share overseas	28.0%	49.9%	46.4%	24.6%	10.1%
% Share domestic	72.0%	50.1%	53.4%	75.4%	89.9%
% Share of overnight visitors	45.1%	99.7%	52.1%	30.4%	98.6%
% Share of day visitors	54.9%	0.3%	47.9%	69.5%	1.4%
Top international markets	United Kingdom (33.3%)	Germany (36.4%)	United Kingdom (35.0%)	United Kingdom (38.7%)	-
	Germany (18.5%)	United Kingdom (16.2%)	Germany (24.2%)	Germany (12.6%)	
Top domestic markets	Western Cape (72.7%)	Western Cape (51.7%)	Western Cape (58.3%)	Western Cape (56.2%)	Western Cape (92.3%)
	Gauteng (13.7%)	Gauteng (11.5%)	Gauteng (20.7%)	Gauteng (22.9%)	
				KwaZulu-Natal (7.0%)	
Main purpose of visit	Holiday/leisure (47.7%)	Holiday/leisure (90.5%)	Holiday/leisure (91.8%)	Holiday/leisure (88.0%)	Holiday/leisure (12.8%)
	VFR (1.0%)	VFR (8.6%)		VFR (3.5%)	Business (9.2%)
Age profile of visitors	-	-	-	51-70 (38.5%)	
Most common travel group size	Pairs (58.5%)	Pairs (49.9%)	Pairs (71.9%)	Pairs (44.6%)	Alone (65.6%)
	Alone (29.5%)	Alone (16.1%)	Alone (16.1%)	Fours (19.1%)	Pairs (25.7%)
Most common length of stay	2 nights (32.2%)	4 nights (32.1%)	2 nights (31.8%)	1 night (46.6%)	1 night (96.3%)
	5-6 nights (25.3%)	3 nights (31.8%)	3 nights (23.5%)	2 nights (27.5%)	
Most common mode of transport	Own motor vehicle (19.7%)	Own motor vehicle (53.9%)	Own motor vehicle (52.9%)	Own motor vehicle (69.6%)	Own motor vehicle (60.1%)
		Rented car (43.2%)	Rented car (46.1%)	Rented car (27.8%)	Rented car (11.5%)
Top information sources	-	Return visits (34.3%)	-	Word of mouth (38.3%)	VICs (61.0%)
		Word of mouth (28.0%)		Internet/websites (33.8%)	Internet/websites (26.6%)
		Brochures (19.3%)		Return visits (6.8%)	
Average daily spend	-	R201-R500 (46.7%)	-	R201-R500 (39.2%)	R201-R500 (42.2%)
Type of accommodation	Self-catering (22.3%)	B&B (35.7%)	Self-catering (23.1%)	Guesthouse (7.6%)	-
		Guesthouse (29.4%)	Guesthouse (11.6%)	B&B (7.5%)	
		Self-catering (21.9%)	B&B (8.9%)	Self-catering (6.4%)	
Average daily spend on accommodation	-	R1001-R2000 (57.1%)	-	R501-R1000 (16.9%)	
Top three activities undertaken in the Weskus	Scenic drives (52.2%)	Beaches (35.7%)	Scenic drives (36.6%)	Culture/heritage (19.3%)	Scenic drives (73.3%)
	Birding (19.6%)	National Parks (24.0%)	Gourmet restaurants (32.1%)	Scenic drives (16.4%)	Meetings/Incentives (14.0%)
		Cruises (20.2%)	Outdoor activities (11.8%)	Crafts/food markets (12.3%)	

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

6. Trends and Patterns by Origin of Visitors

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL SOURCE MARKET, JAN-JUN 2017		
TOURISM INDICATOR	Overseas	Domestic
% Share overnight visitors	64.5%	49.2%
% Share day visitors	35.4%	49.7%
Age profile of visitors	51-70 (17.6%)	36-50 (20.1%)
Main purpose of visit	Holiday/leisure (91.3%)	Holiday/leisure (70.3%)
Most common travel group size	Pairs (63.7%)	Pairs (45.6%)
	Alone (11.1%)	Alone (23.3%)
Most common length of stay per town	2 nights (25.0%)	1 night (43.2%)
	3 nights (23.1%)	2 nights (25.2%)
Mode of transport	Rented car (78.8%)	Own motor vehicle (78.2%)
Top information sources	Internet/websites (17.4%)	Word of mouth (23.6%)
	Word of mouth (16.4%)	Internet/websites (16.6%)
Type of accommodation	B&B (21.4%)	Self-catering (15.8%)
	Guesthouse (16.4%)	Guesthouse (6.1%)
Average spend on accommodation	R1001-R2000 (18.2%)	R501-R1000 (9.6%)
Average daily spend	R501-R1000 (22.0%)	R201-R500 (27.2%)
Top three activities undertaken in the Weskus	Scenic drives (19.6%)	Scenic drives (18.5%)
	Beaches (14.2%)	Culture/heritage (16.0%)
	Gourmet restaurants (12.4%)	Beaches (13.1%)

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

7. Trends and Patterns by Top International Market

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL SOURCE MARKET, JAN-JUN 2017		
TOURISM INDICATOR	United Kingdom	Germany
% Share overnight visitors	61.4%	72.1%
% Share day visitors	38.6%	27.9%
Age profile of visitors	51-70 years (24.8%)	51-70 years (14.0%)
Main purpose of visit	Holiday/leisure (92.5%)	Holiday/leisure (95.2%)
Most common travel group size	Pairs (70.5%)	Pairs (59.8%)
	Alone (8.7%)	Alone (12.2%)
Most common length of stay per town	2 nights (25.6%)	3 nights (27.9%)
	1 night (21.2%)	2 nights (24.2%)
Mode of transport	Rented car (82.7%)	Rented car (83.0%)
Top information sources	Internet/websites (15.7%)	Internet/websites (18.8%)
	Word of mouth (15.4%)	Word of mouth (15.7%)
Type of accommodation	B&B (20.5%)	B&B (26.2%)
	Guesthouse (15.4%)	Guesthouse (20.5%)
Average spend on accommodation	R501-R1000 (11.0%)	R1001-R2000 (27.1%)
Average daily spend	R201-R500 (19.3%)	R501-R1000 (25.8%)
Top three activities undertaken in the Weskus	Scenic drives (21.0%)	Scenic drives, beaches (18.4% each)
	Gourmet restaurants (16.3%)	National Parks (16.0%)
	Beaches, outdoor activities (10.4% each)	Outdoor activities (10.2%)

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

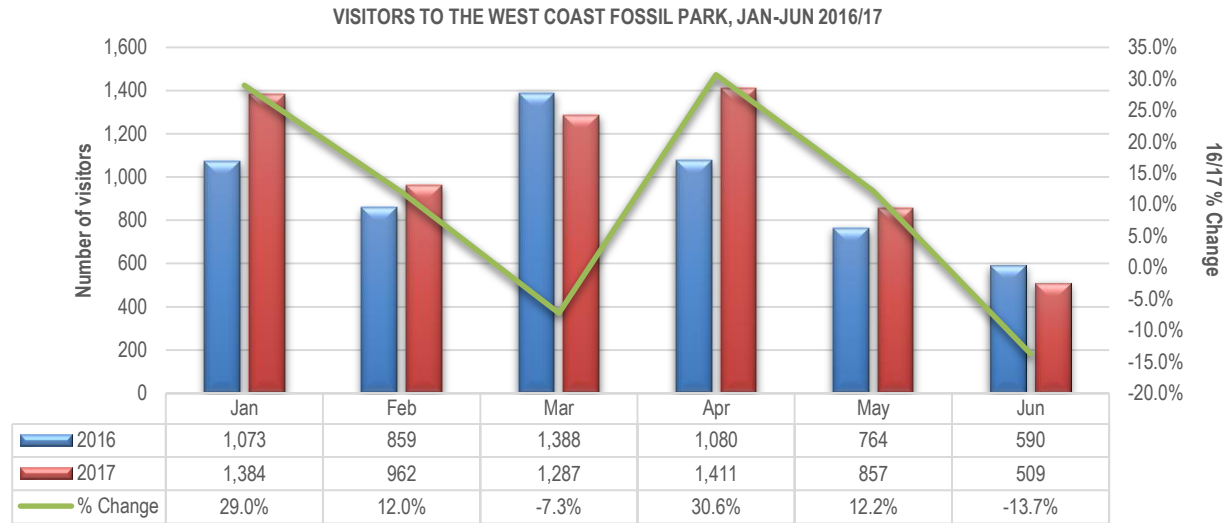
8. Trends and Patterns by Top Domestic Market

OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC SOURCE MARKET, JAN-JUN 2017		
TOURISM INDICATOR	Western Cape	Gauteng
% Share overnight visitors	49.3%	44.4%
% Share day visitors	49.2%	55.3%
Age profile of visitors	36-50 years (20.1%)	36-50 years (24.8%)
Main purpose of visit	Holiday/leisure (62.2%)	Holiday/leisure (87.0%)
	Business (6.5%)	VFR (3.6%)
Most common travel group size	Pairs (40.4%)	Pairs (54.7%)
	Alone (29.4%)	Threes (14.5%)
Most common length of stay per town	1 night (50.7%)	1 night (35.4%)
	2 nights (26.0%)	2 nights (28.6%)
Most common mode of transport	Own motor vehicle (80.1%)	Own motor vehicle (67.1%)
	Rented car (3.5%)	Rented car (22.7%)
Top information sources	Word of mouth (21.0%)	Word of mouth (27.8%)
	Internet/websites (16.5%)	Internet/websites (20.5%)
Most common type of accommodation	Self-catering (14.9%)	Self-catering (16.6%)
	Guesthouse (4.9%)	B&B (7.9%)
Average daily spend	R201-R500 (26.6%)	R201-R500 (27.5%)
Average spend on accommodation	R1001-R2000 (7.3%)	R501-R1000 (16.0%)
Top three activities undertaken in the Weskus	Scenic drives (18.2%)	Scenic drives (23.5%)
	Culture/heritage (17.8%)	Culture/heritage (13.1%)
	Gourmet restaurants (12.8%)	Gourmet restaurants (12.9%)

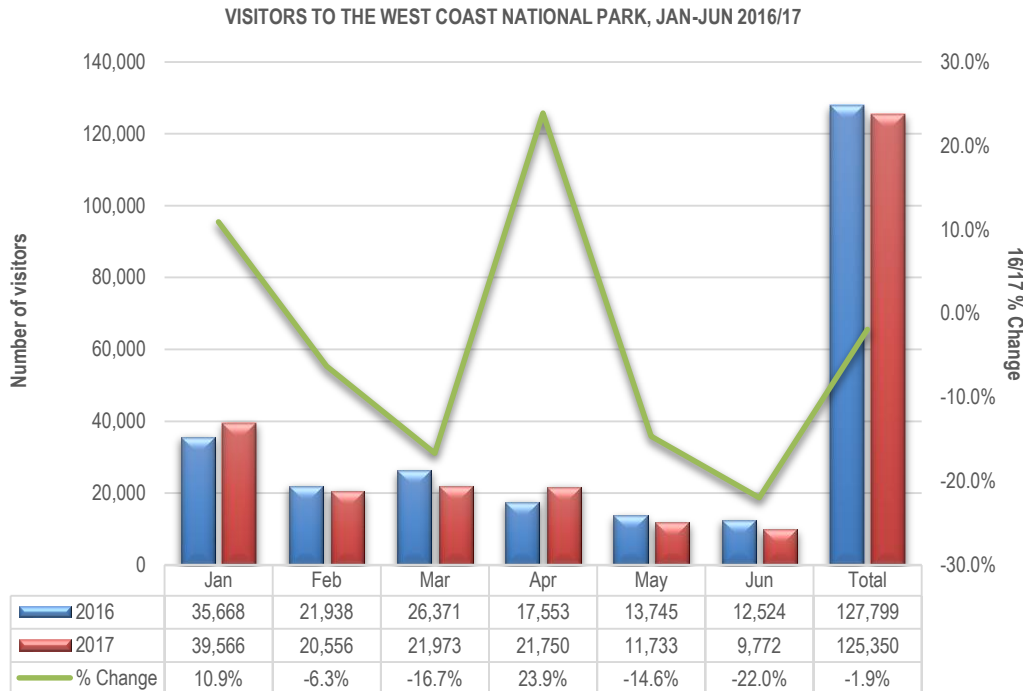
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9. Performance of Weskus Attractions

- The West Coast Fossil Park welcomed a total of 6,410 visitors between January and June 2017, rising by 11.4% when compared to the same period of 2016.
- By month, the Fossil Park portrayed a strong performance, with double digit growth rates in January (29.0%), February (12.0%), April (30.6%) and May (12.2%).
- During the period under review, April saw the highest volume in visitors, largely attributed to the Easter holidays.



Source: West Coast Fossil Park, 2017



Source: SANParks, 2017

- According to the August 2017 edition of the *Brakpan Herald*, the West Coast National Park hosts over 280 different bird species and should be on every birder's destination dream-list.
- Apart from the success of the annual flower season, the park lies in the heart of the prominent Weskus Peninsula Route. The development of the coastal route has brought even greater awareness to the coastal attractions of the region.
- Into the first six months of 2017, the park recorded a total of 125,350 visitors. Across the 6-month period the star performing months for the park was January (10.9%) and April (23.9%). It is important to note that the West Coast National Park records its peak in visitor numbers during the annual flower season period (From August to late September).
- The strong growth in April 2017 (23.9%) can be attributed to the Easter holidays.

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 Weskus:

- *Clanwilliam Tourism*
- *Darling Tourism*
- *Hopefield Tourism*
- *Langebaan Tourism*
- *Patemoster Tourism*
- *Piketberg Tourism*
- *Porterville Tourism*
- *Vanrhynsdorp Tourism*
- *Velddrif Tourism*
- *Vredenburg Tourism*
- *Vredendal Tourism*
- *Yzerfontein Tourism*
- *Goedverwacht Tourism*

The participating attractions in the Weskus:

- *West Coast National Park*
- *West Coast Fossil Park*

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