Western Cape Visitor Trends

WESGRO
cape town & western cape
research

Annual 2016

Contents

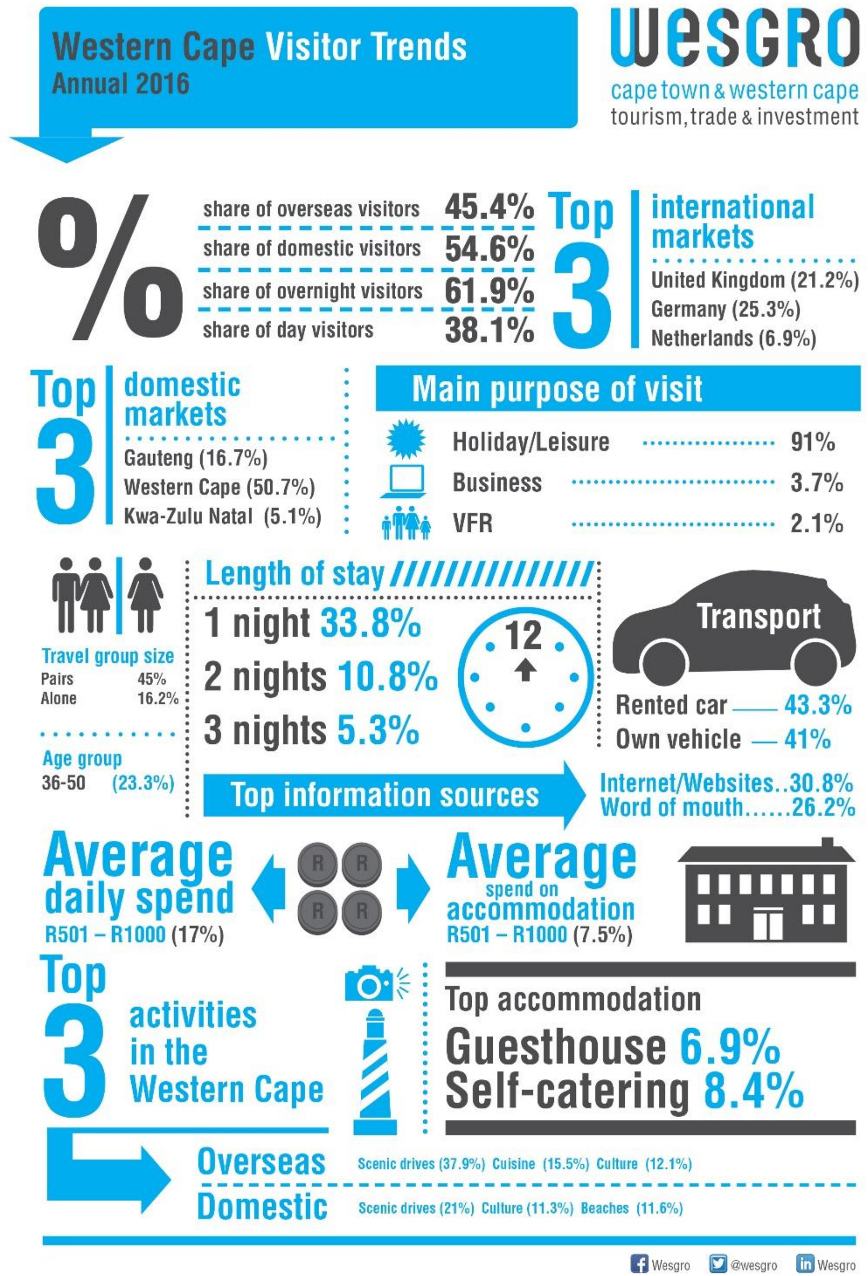
1.Overview

- 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.
- The visitor tracking survey is voluntary survey only placed at our local tourism offices it is not representative of total tourism industry of the region.
- 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.
- In 2016 Western Cape received a total of 29,703 responses to the regional visitor tracking survey from the respective tourism offices.

Cape Garden Route & Klein Karoo	3283
Cape Karoo	799
Cape Overberg	11762
Cape Town	1836
Cape West Coast	6067
Cape Winelands	5956

2. Executive Summary

- Western Cape received 45,4% overseas visitors and 54,6% domestic visitors illustrating equal split of overseas and domestic visitors to the region.
- Western Cape received 61,9% of overnight visitors making positive contribution to the accommodation sector.
- The province also received positive share of day visitors 38,1%, preferable for events and festivals as 684 respondents indicated events/festivals as main activity they enjoyed doing in the province.
- More than 50% of visitors to the Western Cape came from the European region during 2016.
- The top international markets to the region were Germany (25,3%), United Kingdom (21,2%) and the Netherlands (6,9%).
- One night (33,8%) was the highest length of stay for visitors to the Western Cape, which could be your business tourists followed by two nights (10,8%) and three nights (5,3%).
- Both the overseas and domestic market enjoyed scenic drives and cuisine, however overseas visitors enjoyed culture/heritage while domestic visitors preferred the beaches.
- Over 90% of visitors came for holiday showcasing the region as favorable holiday destination.
- Rented car (43,3%) and own motor vehicle (41,0%)%) was the chosen method of transport to the Western Cape.
- Internet/websites (30,8%) and word of mouth (26,2%) was main sources of information used to gather information on the province.
- The region had average daily spend of R501-R1000 daily spend contributing positively to the economy of the Western Cape.
- R501-R1000 was the highest percentage share spend on accommodation, which contributes positively to the accommodation sector of the region.
- Visitors to the Western Cape enjoyed staying at self catering units and B&Bs preferably.



3. Western Cape Trends & Patterns

3.1. Origin of visitors

- Western Cape received the highest percentage share of overseas visitors in 2016 when compared to the previous years, indicating accelerated growth for tourism in the province.

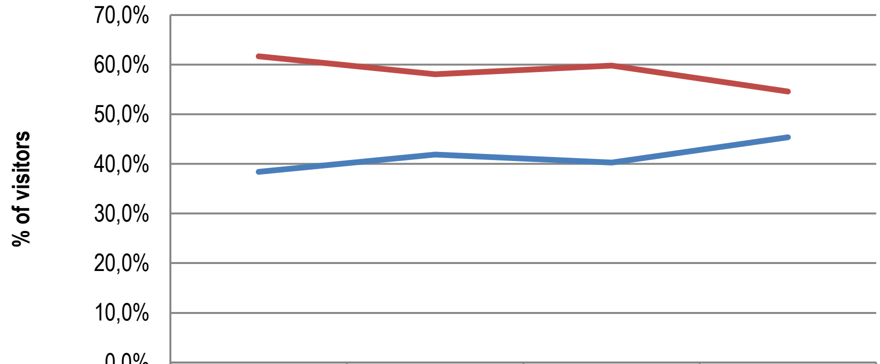
- In 2016 there was more or less equal distribution of visitors to the Western Cape. The region received 54,6% share of domestic visitors and 45,4% share of overseas visitors.

- Top markets to the region illustrated Europe maintained its position as the Western Cape's strongest performing region for each year 2013-2016.

- Traditional markets such as the United Kingdom and Germany ranked as the region's top two international countries followed by Netherlands. The other includes smaller sample of countries into the Western Cape. The other includes smaller sample size of countries to the region.

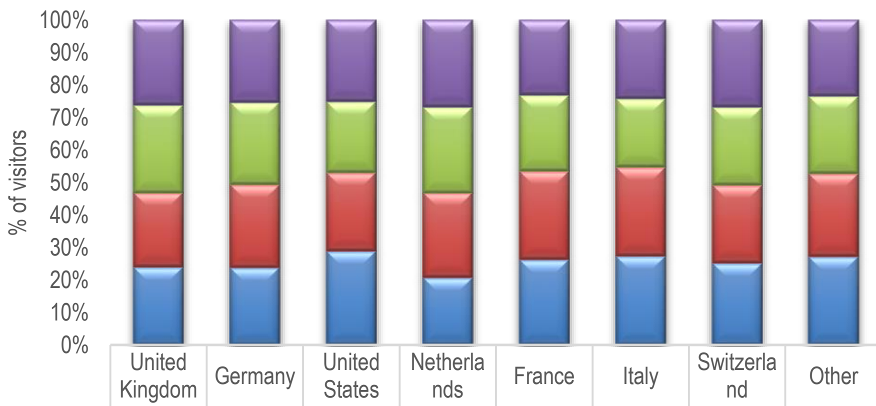
- From 2013-2016 the Western Cape market consistently led domestic travel into the Western Cape, followed by Gauteng and the Eastern Cape. The other includes smaller sample size of domestic provinces to the region.

% SHARE OF OVERSEAS AND DOMESTIC VIDITORS TO WESTERN CAPE, 2013-2016



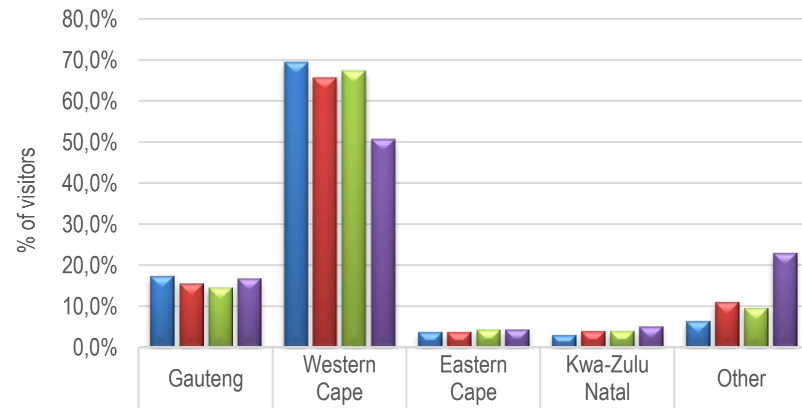
	2013	2014	2015	2016
overseas	38,4%	41,9%	40,3%	45,4%
domestic	61,7%	58,1%	59,8%	54,6%

TOP INTERNATIONAL MARKETS TO THE WESTERN CAPE, 2016



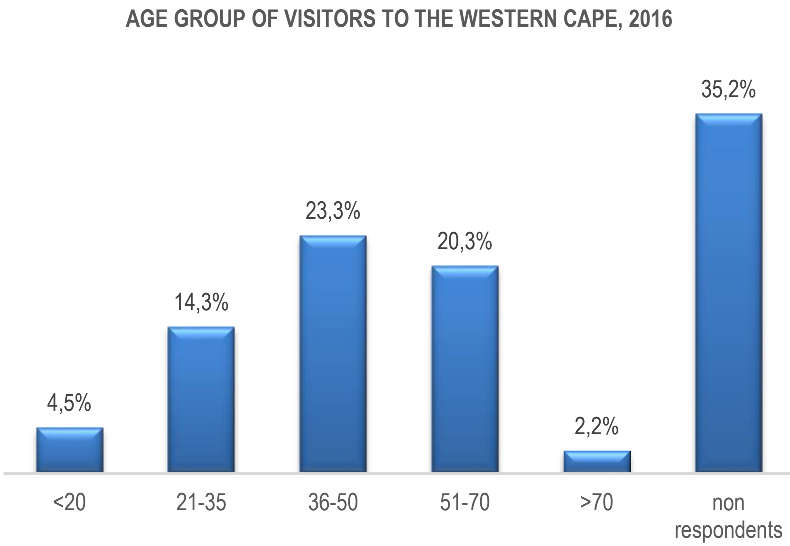
	United Kingdom	Germany	United States	Netherlands	France	Italy	Switzerland	Other
2013	23,1%	26,8%	5,3%	8,9%	4,9%	2,3%	4,9%	23,8%
2014	23,9%	26,9%	4,6%	8,8%	5,0%	2,0%	4,4%	24,4%
2015	20,2%	27,2%	5,1%	8,7%	5,8%	2,6%	4,4%	26,0%
2016	21,2%	25,3%	6,1%	6,9%	5,6%	2,6%	4,6%	27,7%

TOP DOMESTIC MARKETS TO THE WESTERN CAPE, 2013-2016



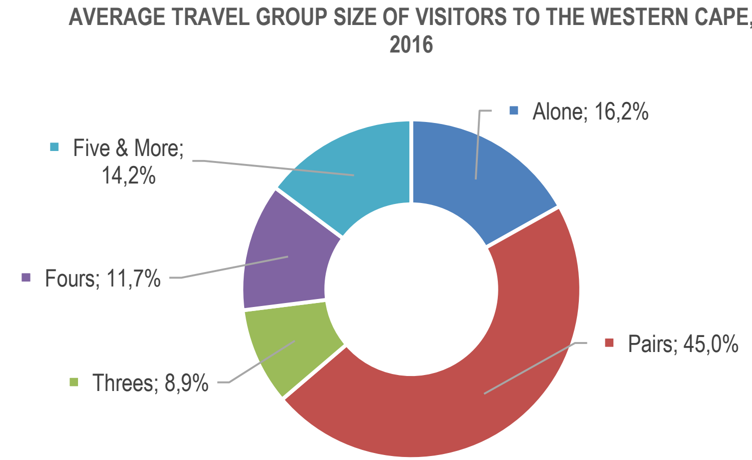
	Gauteng	Western Cape	Eastern Cape	Kwa-Zulu Natal	Other
2013	17,4%	69,5%	3,7%	3,0%	6,4%
2014	15,6%	65,7%	3,7%	4,0%	11,0%
2015	14,6%	67,4%	4,4%	4,0%	9,6%
2016	16,7%	50,7%	4,4%	5,1%	23,1%

3.2 Age group

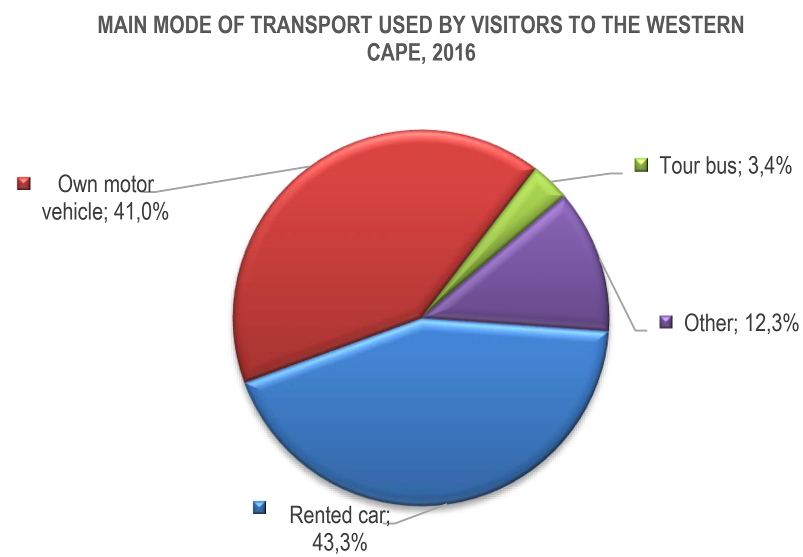


- The age groups (36-50 years) 23,3% was the leading age group amongst all visitors to the Western Cape, followed by visitors in the age group 51-70 years 20,3%.
- The travel group size revealed that visitors to the province enjoyed travelling in pairs (45,0%), which could be your couples or friends.
- Travelling alone (16,2%) was also popular amongst visitors, which could be your business tourists.
- Own motor vehicle (41,0%) and rented car (43,3%) was the most favourable mode of transport used by visitors to the Western Cape.

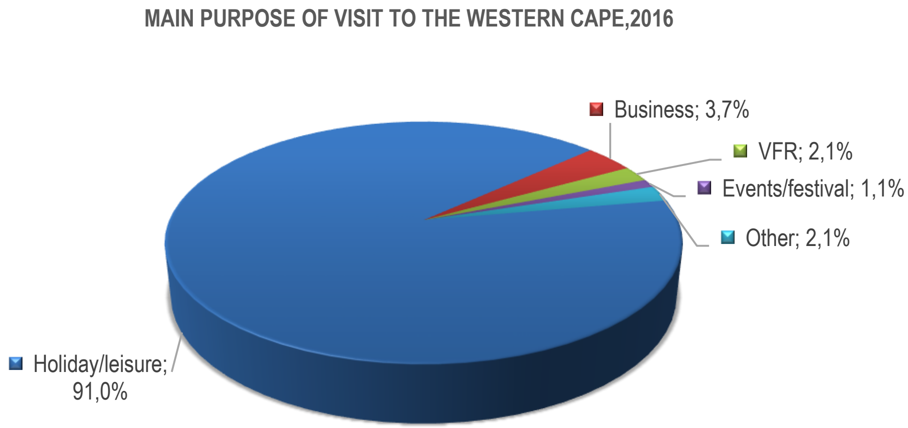
3.3 Group size



3.4 Mode of transport



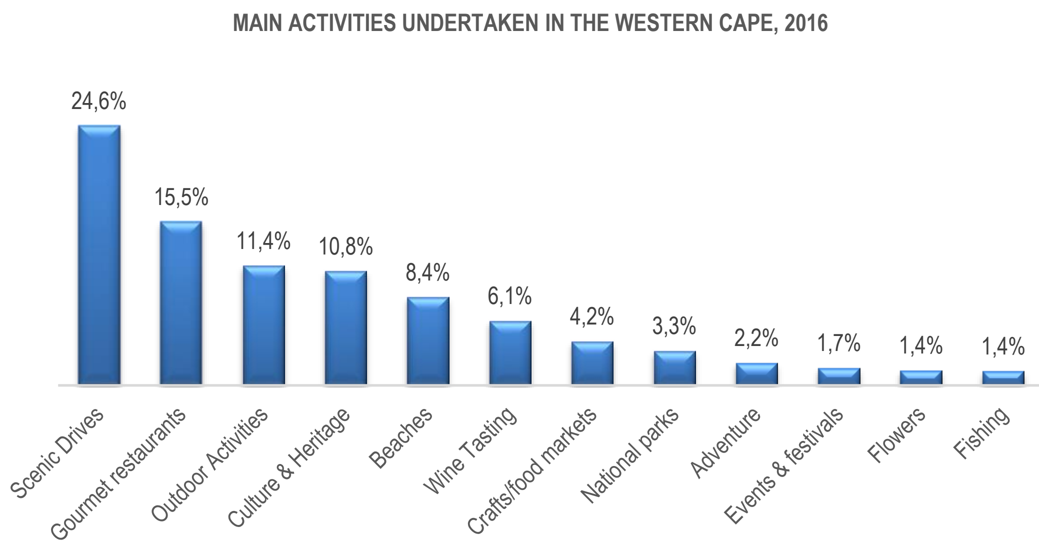
3.5. Purpose of visit



- The trends revealed that holiday/leisure ranked as the main motivation for travel to the Western Cape with percentage share of 91,0%.%.
- Visitors to the region also came for business 3,7%, visiting friends and family 2,1%, events/festivals (1,1%).
- The top five activities in the Western Cape in 2016 were:

- Scenic drives (24,6%)
- Gourmet restaurants (15,5%)
- Outdoor activities (11,4%)
- Culture/heritage experiences (10,8%)
- Beaches (8,4%)

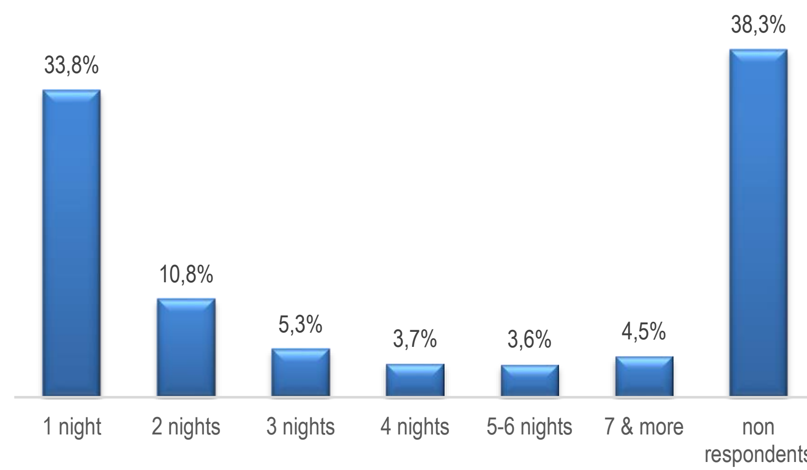
3.6. Main activities



- The majority of the visitors to the Western Cape stayed for one night to two nights.
- The trends revealed a strong share of overnight visitors 61,9% than day visitors 38,1% amongst all visitors to the Western Cape.
- The positive overnight stay illustrates positive tourism growth and contributes positively to the accommodation establishments.
- Self catering, B&B and guesthouses ranked amongst the most popular accommodation categories used by visitors to the Western Cape.

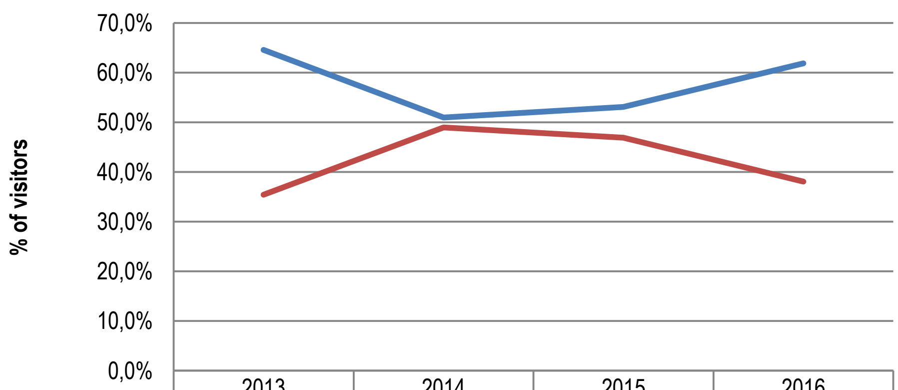
3.7 Length of stay

AVERAGE LENGTH OF STAY IN THE WESTERN CAPE,2016



3.8 Overnight stay

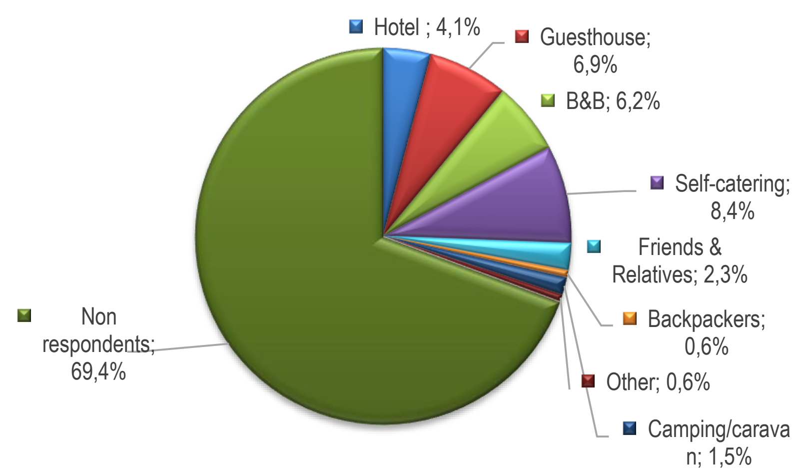
%SHARE OF OVERNIGHT & DAY VISITORS TO THE WESTERN CAPE, 2013-2016



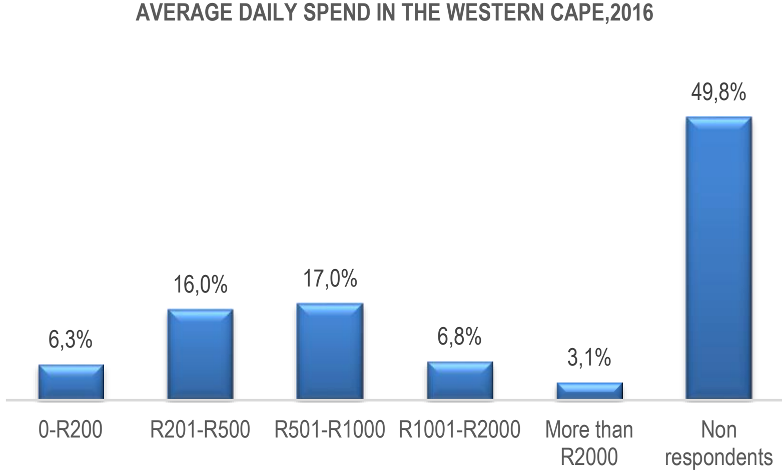
	2013	2014	2015	2016
Overnight	64,6%	51,0%	53,1%	61,9%
Day	35,4%	49,0%	46,9%	38,1%

3.9 Accommodation used by visitors

ACCOMMODATION USED BY VISITORS TO THE WESTERN CAPE,2016



3.10 Average daily spend



- The highest average daily spend in 2016 for the Western Cape was R201-R500 and R501-R1000 (17,0%).
- Internet/websites (30,8%) and word of mouth (26,2%) were the most popular source of information used.
- Amongst all visitors to the province the highest expenditure range on accommodation was R501-R1000 (7,5%).

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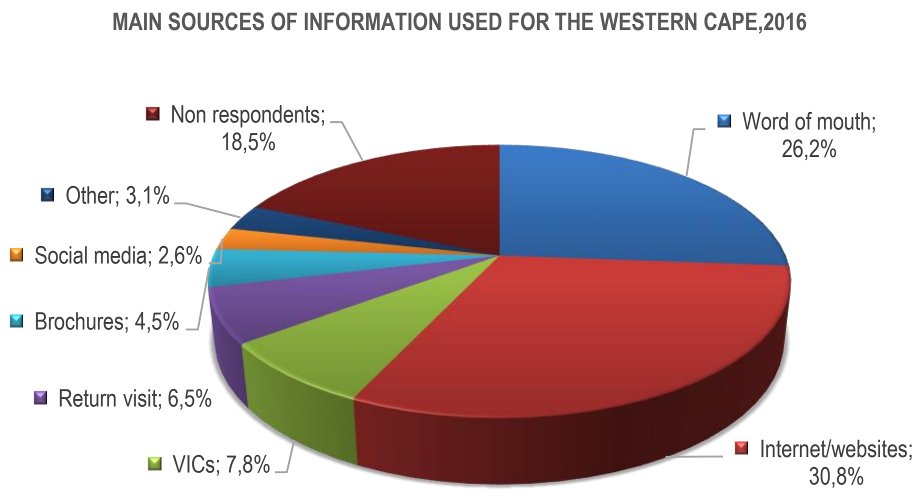
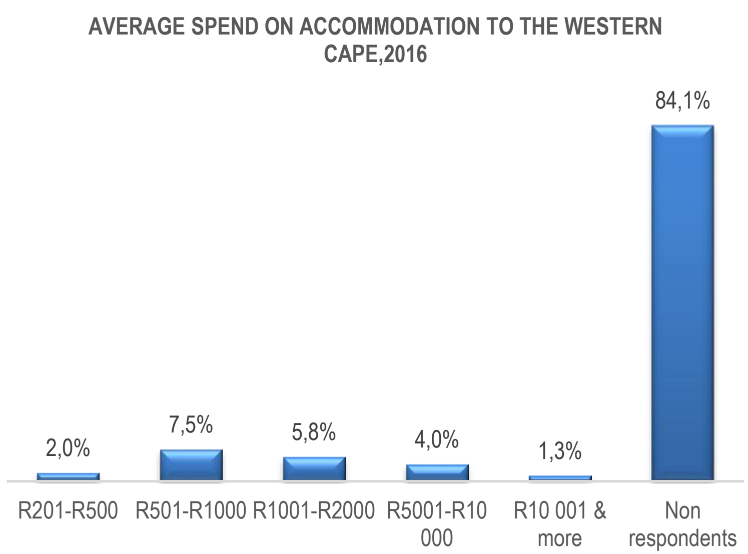
3.11 Information sources used



3.12 Average spend on accommodation



4. Profile/Snapshot of overseas and domestic market

OVERVIEW OF OVERSEAS & DOMESTIC VISITOR TRENDS AND PATTERNS, 2016		
TOURISM INDICATOR	**OVERSEAS**	**DOMESTIC**
Age group	21-35 (32.5%)	21-35 (45.9%)
	36-50 (25.4%)	36-50(35.8%)
	51-70 (10.6%)	51-70 (15.1%)
Main purpose of visit	Holiday/leisure (85.7%)	Holiday/leisure (95.5%)
	Business (15.5%)	Business (11.0%)
	Events (1.1%)	VFR (5.1%)
Most common travel group size	Pairs (54.8%)	Alone (52.1%)
	Alone (39.1%)	Pairs (34.8%)
Most common length of stay	2 nights (22.9%)	1 night (40.8%)
	3 nights (21.5%)	2 nights (24.9%)
Most common mode of transport	Rented car (51.0%)	Rented car (37.6%)
	Own Motor Vehicle (22.9%)	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 (20.9%)	R501-R1000 (15.9%)
Type of accommodation	B&B (26.7%)	Self-catering (22.6%)
	Self-Catering (21.2)	B&B (23.6%)
Average spend on accommodation	R501-R1000 (39.0%)	R501-R1000 (29.0%)
Top three activities undertaken	Scenic drives (37,9%)	Scenic drives (21,0%)
	Gourmet restaurants (15,5%)	Gourmet restaurants (11,3%)
	Culture & Heritage (12,1%)	Beaches (11,6%)

5. Profile/Snapshot of top international markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL SOURCE MARKET, 2016					
TOURISM INDICATOR	Germany	United Kingdom	Netherlands	France	Australia
Main purpose of visit	Holiday/leisure (94.8%) Business (2.1%)	Holiday/leisure (94.1%) Business (2.0%)	Holiday/leisure (96.7%)	Holiday/leisure (96.1%)	Holiday/leisure (92.2%)
Most common travel group size	Pairs (58.4%) Alone (16.1)	Pairs (57.3%) Alone (16.3%)	Pairs (65.6%) Fours (11.9%)	Pairs (52.2%) Alone (13.8%)	Pairs (58.9%) Alone (19.8%)
Most common length of stay per town	1 night (35.6%) 2 nights (27.1%)	1 night (33.3%) 2 nights (26.9%)	1 night (32.2%) 2 nights (29.5%)	1 night (37.0%) 2 nights (19.9%)	1 night (29.4%) 7 nights & more (19.2%)
Most common mode of transport	Rented car (75.0%) Own Motor Vehicle (9.8%)	Rented car (75.2%) Tour bus (5.7%)	Rented car (82.0%) Tour bus (7.7%)	Rented car (70.5%) Tour bus (13.4%)	Rented car (61.6%) Tour bus (13.4%)
Top information sources	Internet/websites (33.1%) Word of mouth (25.5%)	Internet/websites (33.1%) Word of mouth (28.5%)	Internet/websites (32.3%) Word of mouth (22.9%)	Word of mouth (28.4%) Internet/websites (33.6%)	Word of mouth (35.4%) Internet/websites (23.8%)
Most common type of accommodation	Self-catering (23.3%) B&B (25.1%)	B&B (26.9%) Guesthouse (23.7%)	Guesthouse (28.8%) B&B (27.0%)	-	-
Average daily spend on accommodation	R501-R1000 (39.7%)	R501-R1000 (39.0%)	R501-R1000 & R201-R500 (34.5%)	-	-
Average daily spend	R501-R1000 (45.7%)	R501-R1000 (44.4%)	R501-R1000 (46.7%)	R501-R1000 (44.2%)	R501-R1000 (40.4%)
Top three activities undertaken	Outdoor Activities (20.1%) Scenic drives, gourmet restaurants (14.5% each) Culture/heritage (14.1%)	Culture/heritage (15.7%) Scenic drives (19.0%) Outdoor Activities (18.3%)	Outdoor Activities (18.0%) Culture/heritage (17.4%) Scenic drives (13.9%)	Outdoor Activities (24.0%) Culture/heritage (16.0%) Gourmet restaurants (14.5%)	Outdoor Activities (24.0%) Culture/heritage (19.6%) Scenic drives (12.6%)

6. Profile/Snapshot of top domestic markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC SOURCE MARKET, 2016				
TOURISM INDICATOR	**Western Cape**	**Gauteng**	**Eastern Cape**	**KwaZulu-Natal**
Main purpose of visit	Holiday/leisure (89.0%) Business (6.0%) VFR (1.6%)	Holiday/leisure (93.4%) Business (5.0%)	Holiday/leisure (86.8%) VFR (6.7%)	Holiday/leisure (93.4%)
Most common travel group size	Pairs (44.3%) Alone (33.3%)	Pairs (53.0%) Alone (33.3%)	Pairs (46.0%) Alone (26.8%)	Pairs (64.2%) Fours (11.1%)
Most common length of Stay per town	1 night (46.5%) 2 nights (29.0%)	1 night (34.0%) 2 nights (28.0%)	1 night (44.1%) 2 nights (27.4%)	1 night (38.8%) 2 nights (22.4%)
Most common mode of transport	Own motor vehicle (76.1%) Rented car (18.4%)	Own motor vehicle (60.4%) Rented car (32.4%)	Own motor vehicle (50.4%) Rented car (43.4%)	Own motor vehicle (63.0%) Rented car (31.8%)
Top information sources	Word of mouth (29.7%) Internet/websites (22.2%)	Word of mouth & Internet/websites (27.1% each) VICs (17.7%)	Word of mouth (34.5%) Internet/websites (20.7%)	Word of mouth (34.0%) Internet/websites (23.6%)
Most common type of accommodation	Self-catering (44.0%) B&B (16.0%)	Self-catering (41.4%) Guesthouse (17.5%)	Self-catering (33.3%) -	Self-catering (33.8%) B&B (17.2%)
Average daily spend on accommodation	R501-R1000 (37.6%)	R501-R1000 (37.5%)	-	-
Average daily spend	R201-R500 (38.6%)	R201-R500 (40.6%)	R201-R500 (36.4%)	R501-R1000 (40.1%)
Top three activities undertaken	Scenic drives (21.3%) Culture/heritage (15.6%) Gourmet restaurants (13.0%)	Scenic drives (19.8%) Culture/heritage (13.8%) Gourmet restaurants (12.3%)	Scenic drives (17.5%) Culture/heritage (15.8%) Outdoor Activities (9.6%)	Scenic drives (24.2%) Gourmet restaurants (12.8%) Culture/heritage (10.3%)

7. Western Cape Regions

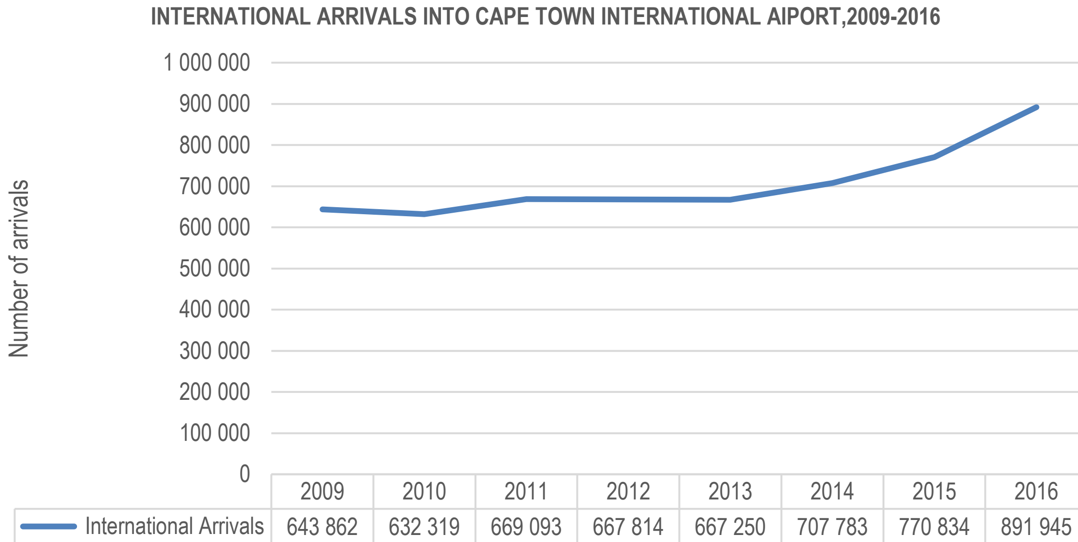
OVERVIEW OF REGIONAL VISITOR TRENDS AND PATTERNS, 2016

TOURISM INDICATOR	Cape Town	Cape Winelands	Cape West Coast	Cape Overberg	Cape Garden Route & Klein Karoo	Cape Karoo
% Share overseas	59.0%	47.1%	26,4%	46,2%	36.5%	5,6%
% Share domestic	41.0%	52.0%	73.6%	53.8%	63.5%	94.4%)
Top international markets	Germany (19.3%) United Kingdom (11.3%) United States (9.3%)	Germany (22.6%) United Kingdom (15.9%) France (8.8%)	Germany (29.9%) United Kingdom (24.7%) Netherlands (9.2%)	United Kingdom (32.6%) Germany (21.2%) United States (8.5%)	Germany (39.2%) United Kingdom (22.3%) United States (6.6%)	United Kingdom (23.1%) Belgium, New Zealand, Australia (15.4%) Germany, United States, Belgium (7.7% each)
Top domestic markets	Gauteng (40.7%) Western Cape (28.4%) KwaZulu-Natal (14.8%)	Western Cape (78.4%) Gauteng (11.8%) KwaZulu-Natal (3.7%)	Western Cape (61.6%) Gauteng (18.5%) KwaZulu-Natal (4.9%)	Western Cape (86.2%) Gauteng (7.0%) Eastern Cape (3.5%)	Western Cape (76.4%) Gauteng (10.2%) Eastern Cape (6.9%)	Western Cape (57.5%) Gauteng (16.6%) Free State (5.7%)
Main purpose of visit	Holiday/leisure (85.9%) Business (11.7%) Education (1.3%)	Holiday/leisure (98.5%) Honeymoon/weddings (0.9%) Business (0.5%)	Holiday/leisure (45.3%) Business (28.3%) Honeymoon/weddings (12.1%)	Holiday/leisure (96.5%) Business (2.8%) VFR (0.2%)	Holiday/leisure (88.7%) Business (7.8%) VFR (1.9%)	Holiday/leisure (94.8%) VFR (2.9%) Business (2.4%)
Most common travel group size	Pairs (52.4%) Alone (26.2%)	Pairs (58.9%) Fours (13.0%)	Fours (43.2%) Threes (37.8%)	Pairs (47.4%) Five & More (18.7%)	Pairs (43.6%) Alone (36.1%)	Pairs (43.9%) Threes (14.6%)
Most common length of stay per town/city	7 & more nights (31.6%) 5-6 nights (16.7%)	1 night (43.2%) 2 nights (26.8%)	1 night (61.7%) 2 nights (38.3%)	1 night (35.6%) 2 nights (34.4%)	1 night (40.2%) 2 nights (21.8%)	1 night (63.3%) 2 nights (20.0%)
Most common mode of transport	Tour Bus (32.4%) Shuttle Service (31.2%)	Rented car (40.5%) On foot (local residents) (3.6%)	Rented car (44.3%) Motorbike (34.1%)	Rented car (37.3%) Tour Bus (4.1%)	Rented car (37.8%)	Tour bus (6.3%) Rented car (2.4%)
Top information sources	Word of mouth (38.3%) Internet/websites (28.0%)	VICs (49.4%) Internet/websites (20.3%)	Word of mouth (79.2%) TV/Radio (10.1%)	Internet/websites (21.7%) Word of mouth (20.7%)	Word of mouth (40.7%) Internet/websites (20.4%)	Word of mouth (76.7%) TV/Radio, Books/Magazines, Return Visit (5.3% each)
Average daily spend	R501-R1000 (47.0%)	R1001-R2000 (55.1%)	R1001-R2000 (87.4%)	R201-R500 (38.2%)	R501-R1000 (32.5%)	-
Type of accommodation	Guesthouses (37.5%) Hotel (27.2%)	Self-catering (43.3%) B&B (23.9%)	Rented House/apartment (36.9%) B&B (15.4%)	Self-Catering (36.2%) B&B (30.7%)	Self-Catering (32.2%) Hotel (22.3%)	Friends/Relatives (85.7%) Guesthouses (14.3%)
Average daily spend on accommodation	-	R501-R1000 (51.4%)	R0-R200 (48.0%)	R501-R1000 (39.1%)	R501-R1000 (32.5%)	-
Top three activities	Culture/heritage (13.4%) Outdoor activities (14.3%)	Wine tasting (40.9%) Scenic drives (15.9%)	Scenic drives (64.6%) Culture/heritage (6.5%)	Scenic drives (28.1%) Gourmet restaurants (18.5%)	Scenic drives (26.0%) Outdoor activities (10.1%)	Culture/heritage (92.8%) Scenic drives (3.6%)

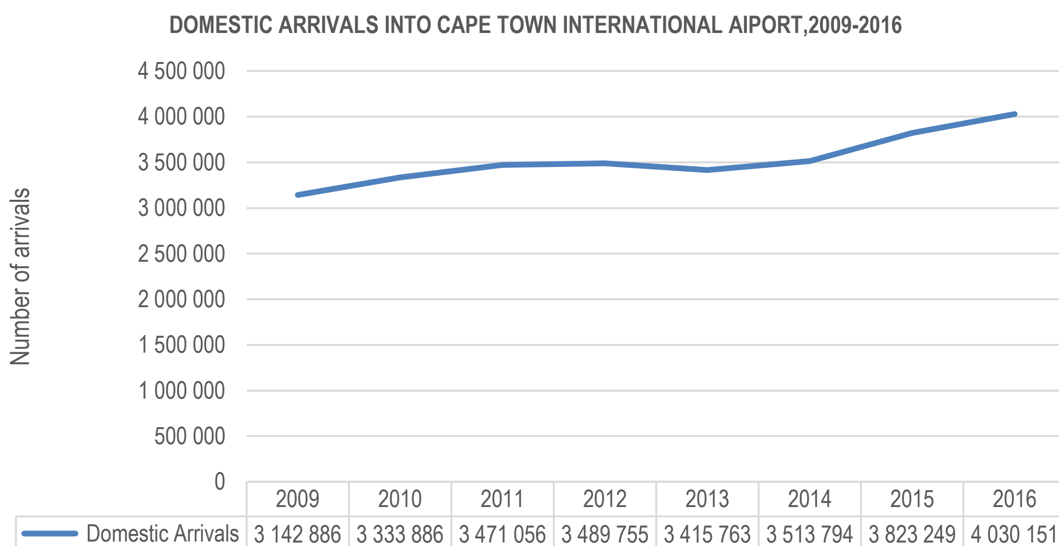
8. Western Cape Attractions

TOTAL NUMBER OF VISITORS BY PARTICIPATING REGIONAL ATTRACTION, 2015/2016			
ATTRACTIONS	2015	2016	15/16 % Change
Cape Town			
Kirstenbosch Botanical Gardens	895 951	947 663	5,8%
V&A Waterfront Shopping Centre	23 516 710	24 606 589	4,6%
Table Mountain National Park	2 593 055	3 250 677	25,4%
Table Mountain National Park: Boulders	660 062	817 898	23,9%
Table Mountain National Park: Cape of Good Hope	887 890	1 021 300	15,0%
Table Mountain Aerial Cableway	967 534	1 125 746	16,4%
Cape Overberg			
De Hoop Nature Reserve	10 938	31 053	183,9%
De Mond Nature Reserve	16 225	8 479	-47,7%
Cape Agulhas Lighthouse	26 035	31 395	20,6%
Agulhas National Park	31 315	35 653	13,9%
Bontebok National Park	18 810	21 700	15,4%
Harold Porter National Botanical Gardens	43 526	62 153	42,8%
Kogelberg Nature Reserve	13 361	7 574	-43,3%
Stony Point	57 503	79 690	38,6%
Cape Garden Route & Klein Karoo			
Cango Caves	212 021	241 560	13,9%
Wilderness National Park	73 174	101 938	39,3%
Tsitsikamma National Park	291 394	337 333	15,8%
Cape West Coast			
West Coast National Park	263 223	342 860	30,3%
Cape Karoo			
Karoo National Park	40 578	40 474	-0,3%

9. Western Cape Airports



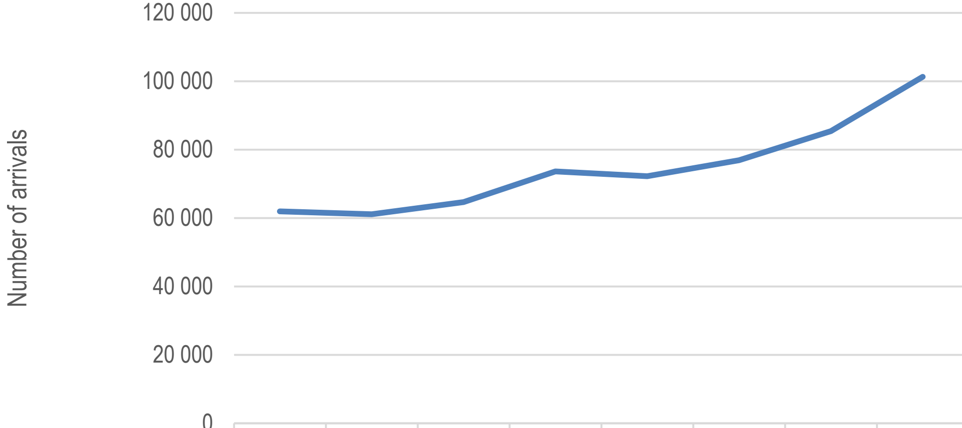
	2009	2010	2011	2012	2013	2014	2015	2016
International Arrivals	643 862	632 319	669 093	667 814	667 250	707 783	770 834	891 945



	2009	2010	2011	2012	2013	2014	2015	2016
Domestic Arrivals	3 142 886	3 333 886	3 471 056	3 489 755	3 415 763	3 513 794	3 823 249	4 030 151

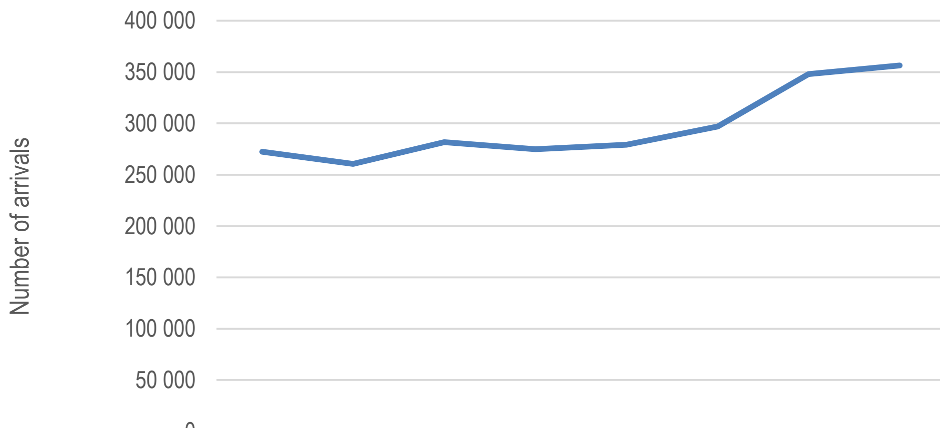
- The Western Cape received 891 945 international arrivals through Cape Town International Airport in 2016, when compared to the previous year of 770 834 arrivals.
- The Western Cape received double digit international travel growth of 15,7% making positive contribution to tourism growth in the province.
- The Western Cape received 4 030 151 domestic arrivals through Cape Town International Airport in 2016, when compared to the previous year of 3 823 249 arrivals.
- The Western Cape received double digit growth from the domestic arrivals of 13,2% making positive contribution to tourism growth in the province.
- Therefore, the Western Cape received combined astounding 4, 9 million arrivals through Cape Town international Airport for 2016.

REGIONAL ARRIVALS INTO CAPE TOWN INTERNATIONAL AIRPORT,2009-2016



	2009	2010	2011	2012	2013	2014	2015	2016
Regional Arrivals	62 003	61 142	64 708	73 590	72 259	76 895	85 366	101 275

ARRIVALS INTO GEORGE AIPORT,2009-2016



	2009	2010	2011	2012	2013	2014	2015	2016
George Airport	272 555	260 510	281 756	275 009	279 180	296 911	348 146	356 479

- Cape Town International Airport received 101 275 regional arrivals, when compared to the previous year of 85 366 arrivals.
- There was also double digit growth of 18,6% for regional arrivals through the airport.
- George airport performed well during 2016 when compared to previous years and had the highest number of arrivals into the airport of 356 479.
- When compared to the previous year the George airport had 2,4% growth.
- Therefore, regionals arrivals and arrivals into George airport also performing well for the province.

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- The participating local tourism offices in the following regions:
- Cape Garden Route & Klein Karoo
- Cape Karoo
- Cape Overberg
- Cape Town
- Cape West Coast
- Cape Winelands

- The participating indicators and attractions in Cape Town and the Western Cape:
- ACSA (Cape Town International Airport)
- ACSA (George Airport)
- Cango Caves
- Cape Agulhas Lighthouse
- De Hoop Nature Reserve
- De Mond Nature Reserve
- Department of Cultural Affairs and Sport: Museum Service
- Harold Porter National Botanical Garden
- Kirstenbosch National Botanical Garden
- Kogelberg Nature Reserve
- Stony Point
- Table Mountain Aerial Cableway
- Table Mountain National Park: Boulders and Cape of Good Hope
- V&A Waterfront

- 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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