Western Cape Regional Trends

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Contents

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.*

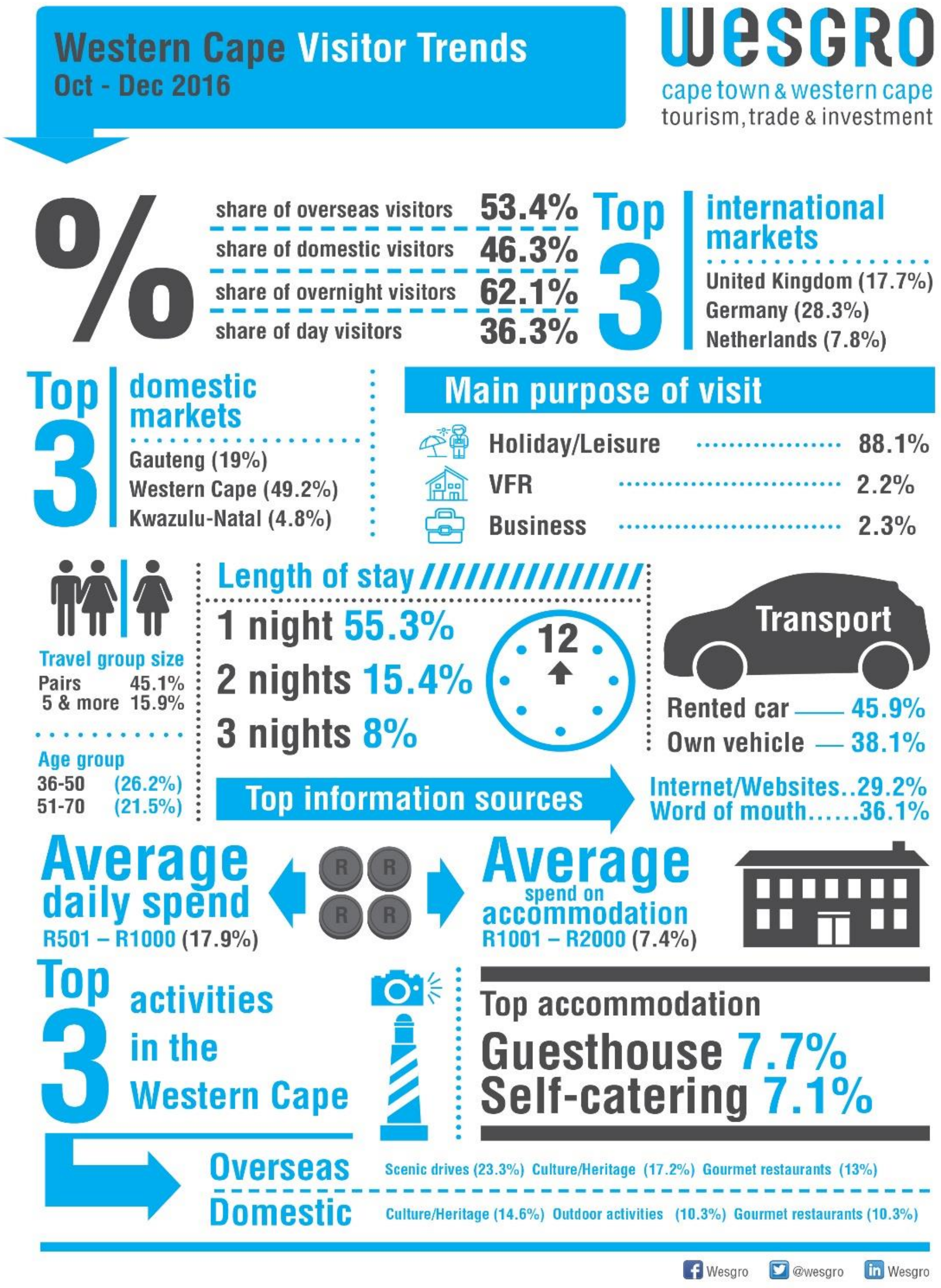
2. Participation and sample size

Between October and December 2016, a total of **8,261** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. The participating regions were:

- Cape Town (535);
- Cape Garden Route & Klein Karoo (816);
- Cape Winelands (2,098);
- Cape West Coast (1,535);
- Cape Karoo (1,628); and
- Cape Overberg (1,649).

3. Executive Summary

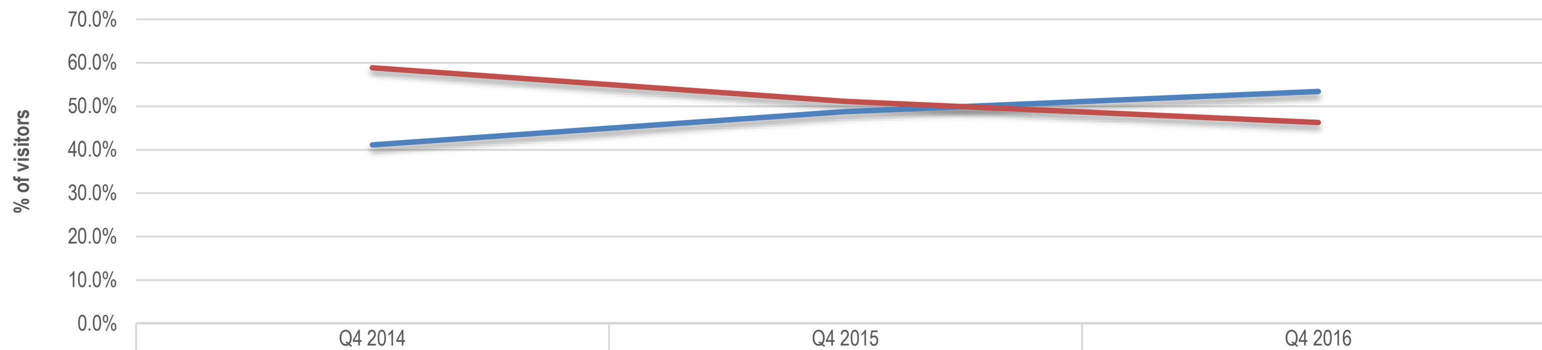
- During Q4 2016, the Western Cape recorded a share of 46.3% from the domestic market and 53.4% from the international market.
- Germany (28.3%), the United Kingdom (17.7%) and Netherlands (7.8%) maintained their positions as the Western Cape's top three international markets.
- The domestic market were led by travellers from the Western Cape (49.2%), Gauteng (19.0%) and KwaZulu-Natal (4.8%).
- Holiday/leisure ranked as the leading motivation for travel to the Western Cape, with over 80% of respondents primarily travelling for leisure. Business (2.3%) and visiting friends and relatives (2.2%) followed as the second and third most popular reasons for travelling.
- The most frequent age profile of visitors to the province were 36-50 (26.2%) and 51-70 (21.5%) years. Visitors mainly travelled in pairs (45.1%) and 15.9% of visitors travelled in groups of five & more.
- Visitors mainly travelled to and about in the Western Cape by utilising their own motor vehicles (38.1%) and rented cars (45.9%).
- 62.1% of visitors to the province indicated overnight stays, of which most stayed for an average of one (55.3%), two (15.4%) and 3 nights (8.0%).
- Top accommodation choices included guesthouse establishments (7.7%), self-catering (7.1%) and B&Bs (5.8%). During the period under review, visitors spent an average of R1001-R2000 (7.4%) per day on accommodation in the region.
- Word of mouth (36.1%) and internet/websites (29.2%) ranked as the leading information sources used by visitors to obtain information on the Western Cape.
- During Q4 2016, visitors spent on average R501-R1000 (17.9%) per day in the province.
- Scenic drives (25.3%), culture/heritage (16.2%) and gourmet restaurants (11.8%) ranked as the top three activities enjoyed by travellers during Q4 2016.



4. Western Cape Visitor Trends & Patterns

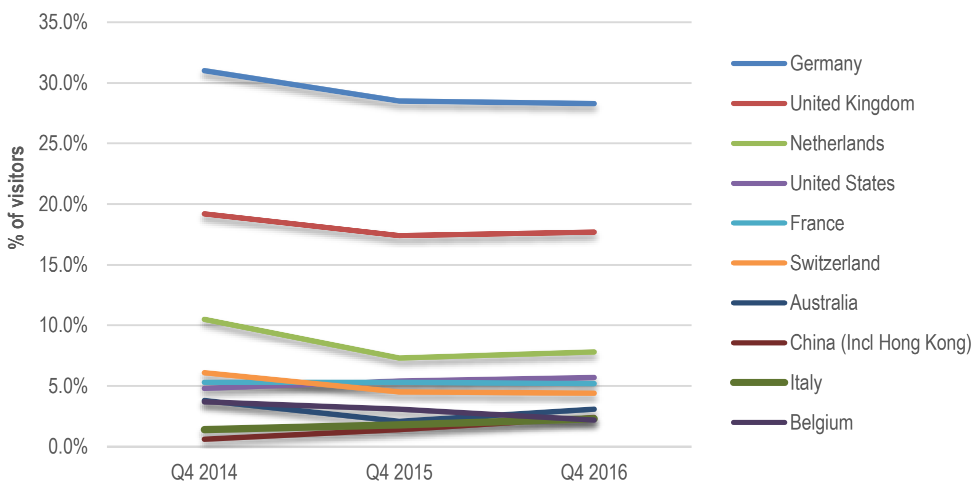
4.1 Origin of Visitors

% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE WEST COAST, Q4 2014-2016

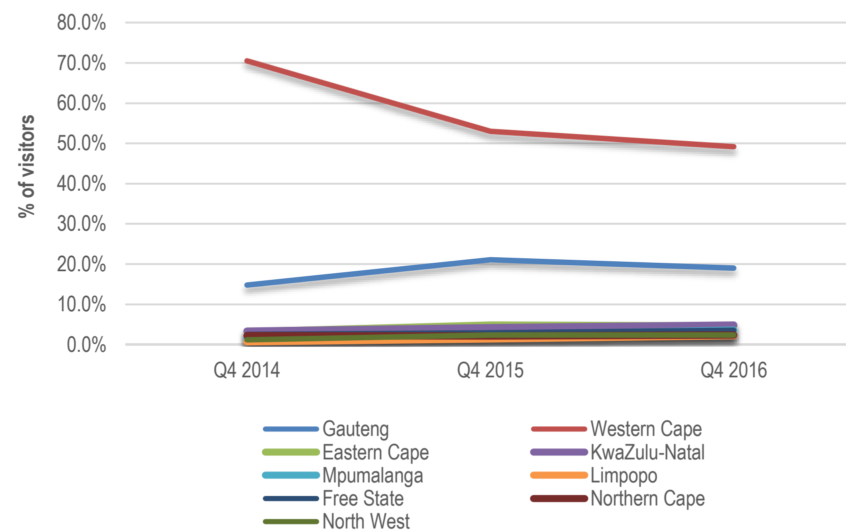


	Q4 2014	Q4 2015	Q4 2016
Overseas	41.1%	48.8%	53.4%
Domestic	58.9%	51.1%	46.3%

TOP INTERNATIONAL SOURCE MARKETS TO THE WESTERN CAPE, Q4 2014-2016

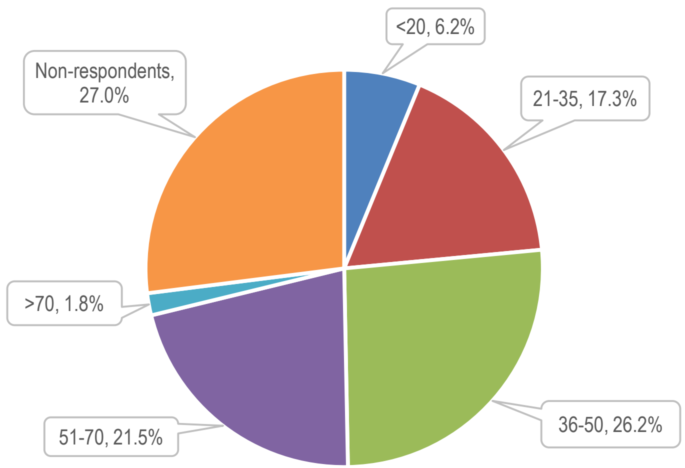


TOP DOMESTIC SOURCE MARKETS TO THE WESTERN CAPE, Q4 2014-2016



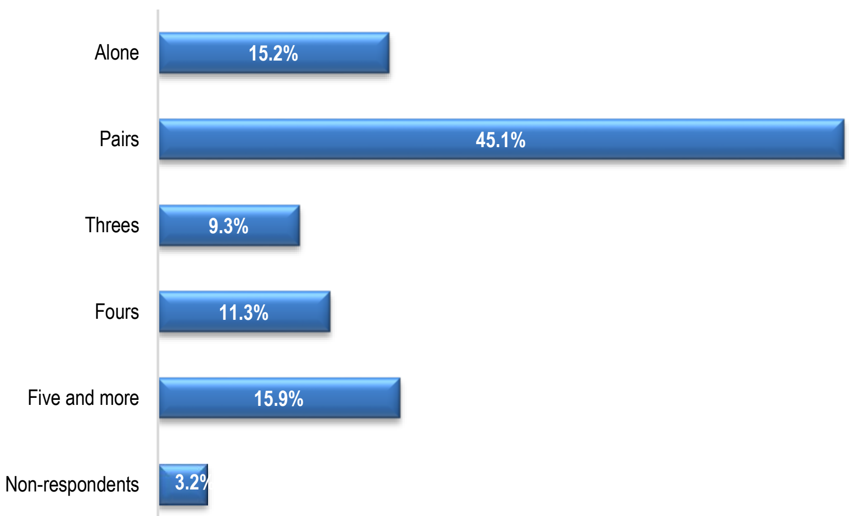
4. Western Cape Trends and Patterns

4.2 Age Profile of Visitors

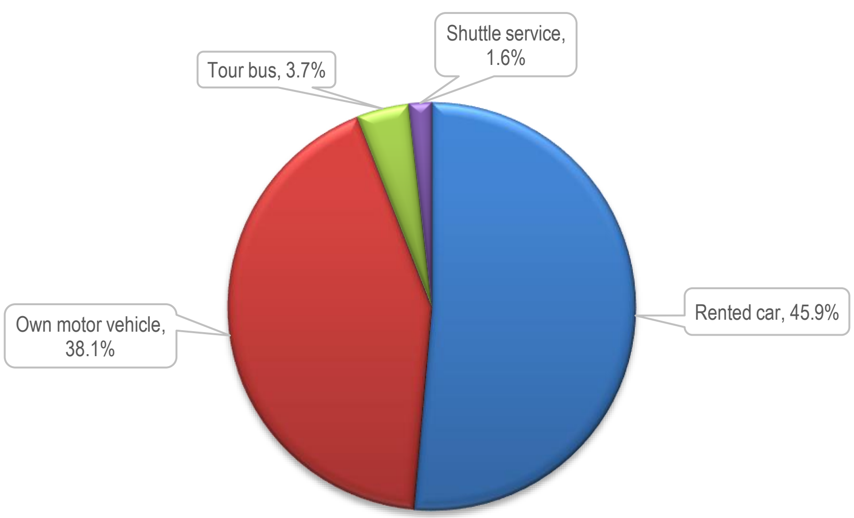


- The age groups 36-50 and 51-70 years emerged as the most common age groups amongst visitors to the Western Cape. 21-35 years followed as the third largest share of respondents.
- Travelling in pairs or/as couples (45.1%) ranked as the most prominent travel group, followed by 15.9% who travelled in groups of five and more.
- Rented cars (45.9%) ranked as the top transport choice amongst visitors to the region, followed by own motor vehicles (38.1%) and tour busses (3.7%).

4.3 Travel group size

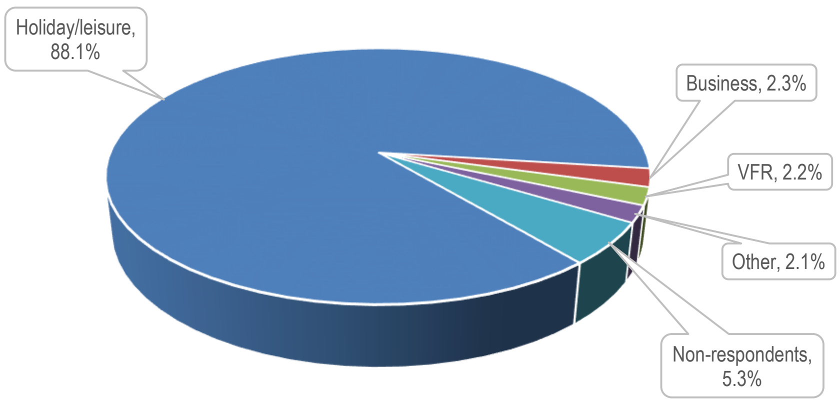


4.4 Mode of transport



4. Western Cape Trends and Patterns

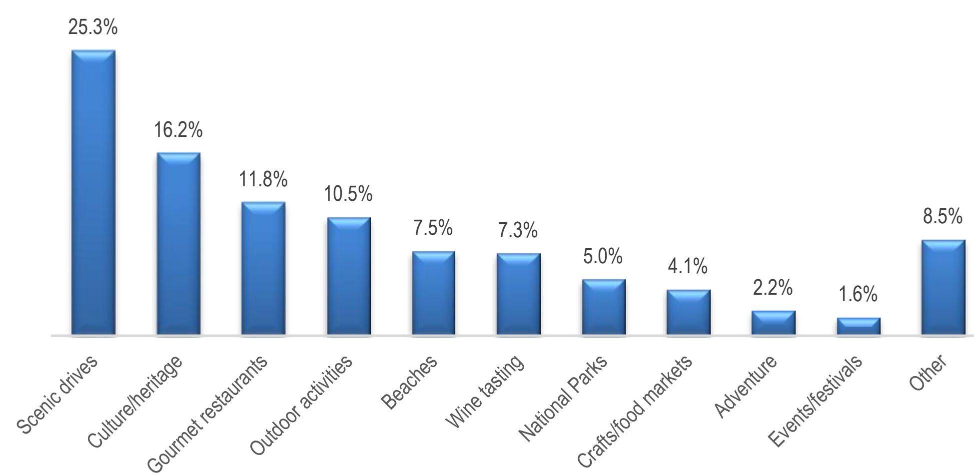
4.5 Main purpose of visit



- Holiday/leisure (88.1%) led as the top reason for travel to the province. In South Africa, the Western Cape led as the top province for holiday/leisure in 2016.
- Business (2.3%) ranked as the second most popular reason for travel. While the Western Cape is a popular leisure destination, the MICE (Meetings, Incentives, conferences and Exhibitions) sector continues to be as strong as ever. According to the Cape Town International Convention Centre (CTICC), eight consumer shows were hosted in the first four months of 2017.

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

4.6 Top activities undertaken in the Western Cape

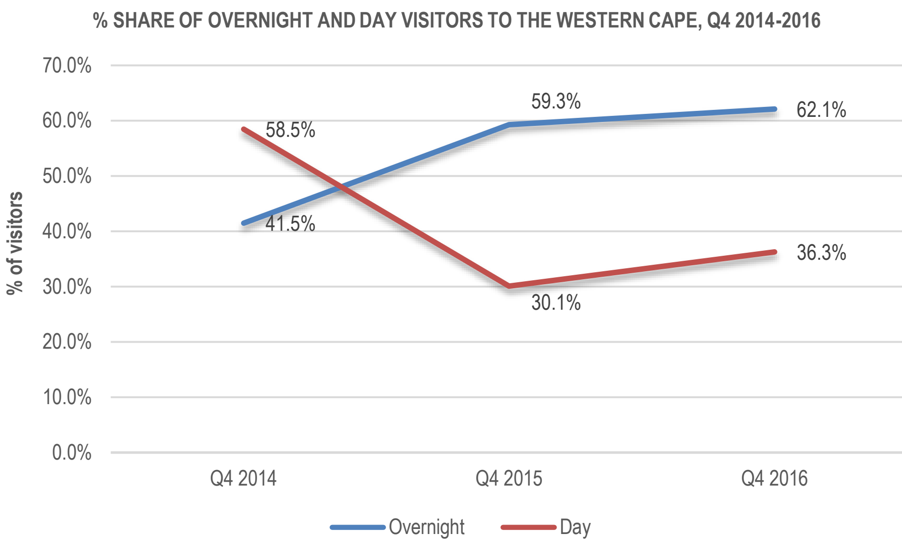


**Other: Includes whale watching, golf, fishing, gambling, expos/exhibitions, sport events/spectator, astro tourism, health & wellness/spas, shopping, game reserves, and cruises.*

- Scenic drives (25.3%), culture/heritage (16.2%) and gourmet restaurants (11.8%) ranked as the top three activities enjoyed by visitors to the Western Cape.
- In addition to the Western Cape's rich culture and heritage, the province is also renowned for its abundance in natural attractions. The popularity of these attractions is evident in the top 10 activities enjoyed by travellers, which included outdoor activities (10.5%), beaches (7.5%) and national parks (5.0%).

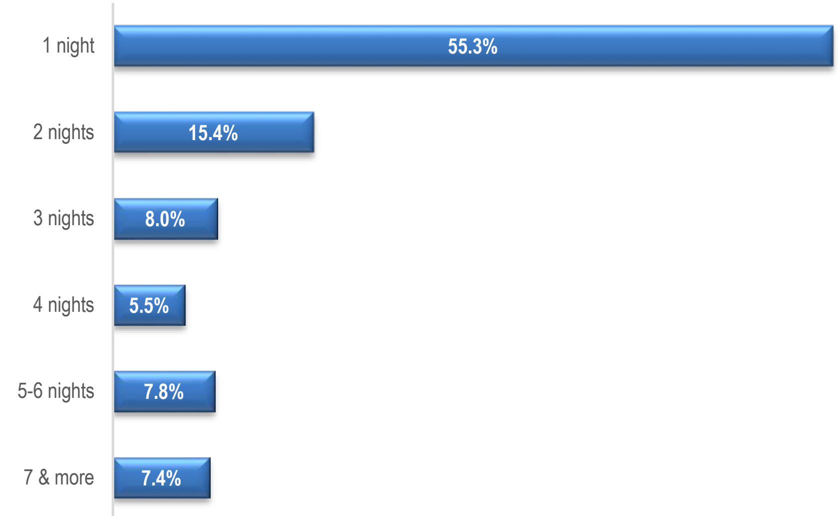
4. Western Cape Trends and Patterns

4.7 Overnight vs. Day Visitors

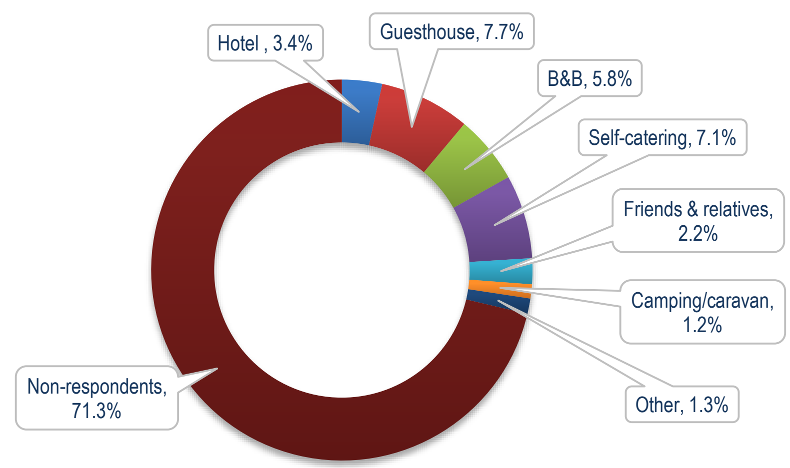


- During Q4 2016, 62.1% of respondents indicated overnight stays in the province, while a share of 36.3% were day visitors.
- When taking a closer look at the trend in length in stay, visitors stayed on average one, two and three nights, followed by those who stayed 5-6 and 7 and more nights.
- This trend underlines the Western Cape's popularity in weekend getaways, as well as extended leisure holidays for up to a week and more.
- Guesthouses, self-catering and B&Bs ranked as the top three most preferred accommodation choices amongst travellers to the province.
- While 2.2% of travellers indicated that they stayed with friends and relatives, paid accommodation held a much larger share of visitors for the period.

4.8 Average length of stay



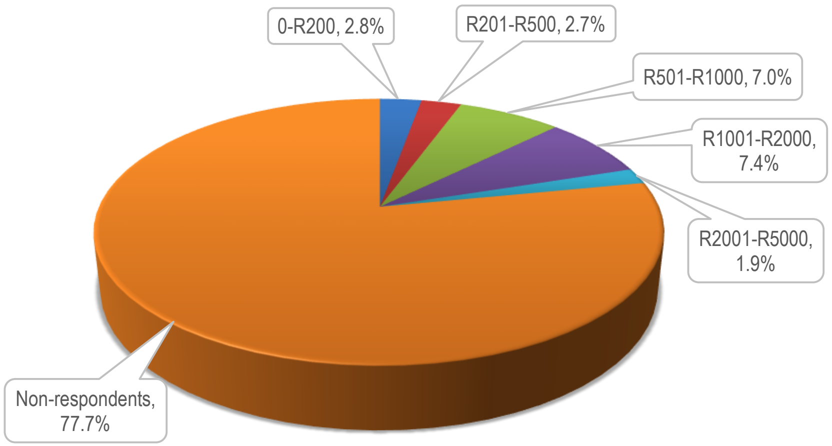
4.9 Accommodation Usage



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

4. Western Cape Trends and Patterns

4.10 Average spend on accommodation



- On average, visitors spent between R1001-R2000 (7.4%) on accommodation in the Western Cape. R501-R1000 (7.0%) followed as the second most common expenditure range on accommodation.

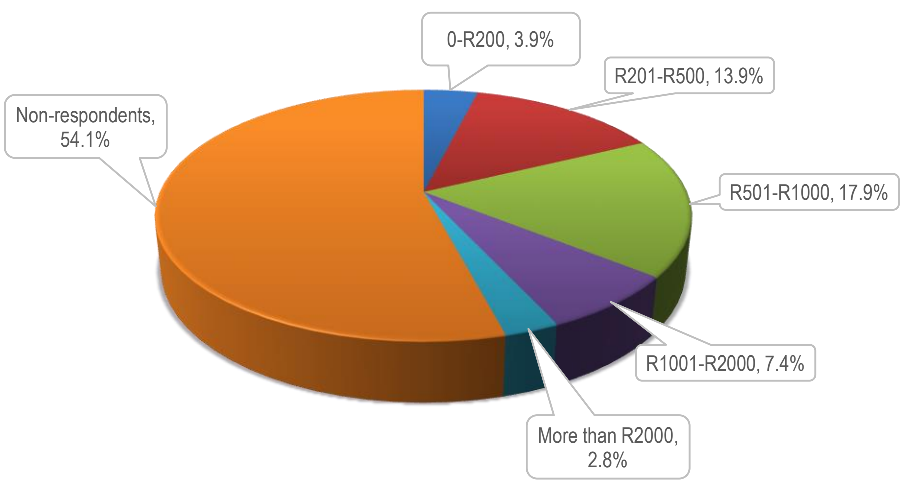
- In addition to the expenditure levels on accommodation, visitors spent on average R501-R1000 (17.9%) and R201-R500 (13.9%) per day in the Western Cape.

- Word of mouth (36.1%) and internet/websites (29.2%) ranked as the top sources for obtaining information on the province. VICs (6.8%) ranked as the third most popular information source, indicating the steady demand for tourism offices as an information tool. 6.1% of respondents were return visitors, a trend which indicates the strength in the Western Cape's tourism sector.

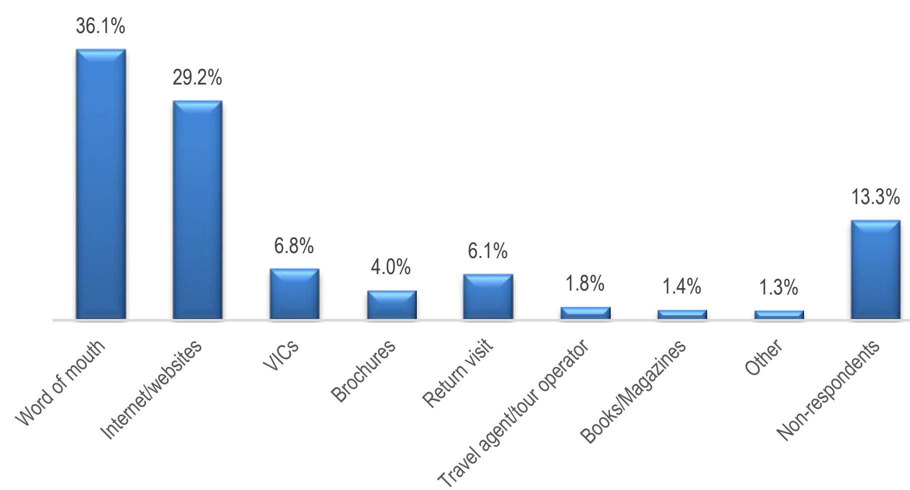
- According to Jumia Travel *"Hospitality Report Africa"*, there are approximately ***345 million internet users in Africa***, representing 9.3% of the total population and a penetration rate of 27.7%. Hospitality trends further revealed that South Africa ranked in 6th position amongst the top eight African internet countries.

- Lack of digital skills remains a major barrier to mobile internet adoption especially in Sub-Saharan Africa. Supporting digital literacy by tourism stakeholders in the continent is therefore an essential element in promoting e-tourism in Africa.

4.11 Average daily spend



4.12 Top Information Sources



5. Trends and patterns by region

OVERVIEW OF REGIONAL VISITOR TRENDS AND PATTERNS BY REGION, Q4 2016						
TOURISM INDICATOR	Cape Town	Cape Garden Route & Klein Karoo	Cape Winelands	Cape West Coast	Cape Karoo	Cape Overberg
% Share overseas	53.3%	52.7%	61.8%	28.8%	43.5%	63.6%
% Share domestic	46.7%	46.4%	37.9%	71.1%	56.0%	36.2%
% Share of overnight visitors	-	48.0%	28.9%	48.9%	86.3%	90.6%
% Share of day visitors	-	50.2%	71.1%	51.1%	12.0%	3.9%
Top international markets	Germany (18.8%) United Kingdom (14.7%) United States (7.9%)	Germany (34.0%) United kingdom (17.9%)	Germany (40.4%) United Kingdom (17.9%) Netherlands (10.0%)	Germany (32.4%) United Kingdom (19.2%) Netherlands (10.4%)	United Kingdom (18.4%) Germany (17.2%) United States (7.8%)	Germany (21.3%) United Kingdom (17.8%) Switzerland (5.8%)
Top domestic markets	-	Western Cape (45.4%) Gauteng (15.0%)	Western Cape (53.3%) Gauteng (17.5%)	Western Cape (59.4%) Gauteng (18.6%) KwaZulu-Natal (4.9%)	Western Cape (36.1%) Gauteng (20.2%) Mpumalanga (8.0%)	Western Cape (50.4%) Gauteng (20.3%)
Main purpose of visit	Holiday/leisure (93.8%) Business (5.4%)	Holiday/leisure (90.4%) Business (3.8%)	Holiday/leisure (82.7%)	Holiday/leisure (82.3%) VFR (6.1%)	Holiday/leisure (91.2%) VFR (3.1%)	Holiday/leisure (94.5%)
Age profile of visitors	-	36-50 (18.6%)	36-50 (39.2%)	36-50 (17.7%)	21-35 (29.2%)	36-50 (28.3%)
Most common travel group size	Pairs (56.4%) Alone (26.9%)	Pairs (50.0%) Alone (17.2%)	Pairs (53.0%) Alone (15.3%)	Pairs (47.3%) Alone (18.3%)	5 & more (33.6%) Pairs (30.7%)	Pairs (41.4%) 5 & more (22.9%)
Most common length of stay	7 & more nights (25.1%) 2 nights (21.6%)	2 nights (34.9%) 1 night (21.7%)	2 nights (41.4%) 1 night (24.1%)	1 night (24.8%) 2 nights (21.6%)	1 night (75.8%) 7 & more nights (5.6%)	1 night (86.5%) 2 nights, 5-6 nights (4.7% each)
Most common mode of transport	Tour bus (34.6%) Public transport (26.7%)	Rented car (50.2%) Own motor vehicle (16.7%)	Rented car (56.6%) Own motor vehicle (33.3%)	Own motor vehicle (61.0%) Rented car (25.0%)	Own motor vehicle (49.4%) Rented car (44.1%)	Rented car (61.7%) Own motor vehicle (34.2%)
Top information sources	Word of mouth (55.3%) VICs (18.7%) Internet/websites (16.3%)	Internet/websites (20.6%) Word of mouth (14.6%)	Internet/websites (32.4%) Word of mouth (29.8%) VICs (12.6%)	Internet/websites (22.8%) Word of mouth (21.8%) Return visit (5.9%)	Word of mouth (68.8%) Internet/websites (10.6%) Return visit (8.0%)	Internet/websites (57.9%) Word of mouth (29.5%)
Average daily spend	R501-R1000 (32.5%)	R501-R1000 (11.4%)	R501-R1000 (25.6%)	R501-R1000 (23.8%)	R201-R500 (12.7%)	R201-R500 (9.6%)
Type of accommodation	Guesthouse (9.2%) Hotel (9.0%)	Self-catering (16.1%) B&B (15.1%) Guesthouse (11.8%)	Guesthouse (8.7%) Self-catering (6.3%) B&B (4.6%)	Guesthouse (12.2%) Self-catering (12.1%) B&B (10.3%)	Self-catering (4.5%) Friends & relatives (3.7%)	Guesthouse (3.3%) Self-catering (3.1%) B&B (2.7%)
Average daily spend on accommodation	-	R501-R1000 (6.9%)	R501-R1000 (9.8%)	R1001-R2000 (16.0%)	R501-R1000 (6.0%)	R501-R1000 (4.2%)
Top three activities undertaken	Culture/heritage (35.2%) Gourmet restaurants (18.6%) Outdoor activities (16.5%)	Scenic drives (21.4%) Culture/heritage (19.4%) Outdoor activities (10.9%)	Culture/heritage (19.7%) Wine tasting (19.6%) Gourmet restaurants (17.4%)	Beaches (20.6%) Culture/heritage (13.6%) Scenic drives (13.3%)	Scenic drives (49.5%) Culture/heritage (7.9%) Outdoor activities (7.8%)	Scenic drives (56.8%) Outdoor activities (7.7%) Culture/heritage (7.0%)

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 ORIGIN OF VISITORS, Q4 2016		
TOURISM INDICATOR	Overseas	Domestic
% Share overnight visitors	68.0%	55.5%
% Share day visitors	31.0%	42.2%
Age profile of visitors	36-50 (26.0%)	36-50 (26.3%)
Main purpose of visit	Holiday/leisure (93.9%)	Holiday/leisure (81.6%)
Most common travel group size	Pairs (52.8%)	Pairs (36.3%)
	Alone (12.3%)	5 & more (20.4%)
Most common length of stay per town	1 night (54.8%)	1 night (56.2%)
	2 nights (14.8%)	2 nights (16.2%)
Mode of transport	Rented car (78.2%)	Own motor vehicle (78.2%)
Top information sources	Internet/websites (40.7%)	Word of mouth (42.7%)
	Word of mouth (30.5%)	Internet/websites (15.9%)
Type of accommodation	Guesthouse (8.7%)	Self-catering (10.3%)
	B&B (7.4%)	Guesthouse (6.6%)
Average spend on accommodation	R1001-R2000 (7.9%)	R501-R1000 (6.9%)
Average daily spend	R501-R1000 (19.9%)	R201-R500 (17.1%)
Top three activities undertaken	Scenic drives (23.3%)	Scenic drives (28.0%)
	Culture/heritage (17.2%)	Culture/heritage (14.6%)
	Gourmet restaurants (13.0%)	Gourmet restaurants (10.3%)

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, Q4 2016		
TOURISM INDICATOR	**United Kingdom**	**Germany**
% Share overnight visitors	64.5%	58.1%
% Share day visitors	33.8%	41.2%
Age profile of visitors	51-70 (26.9%)	36-50 (27.9%)
Main purpose of visit	Holiday/leisure (92.6%)	Holiday/leisure (95.3%)
Most common travel group size	Pairs (54.8%)	Pairs (57.8%)
	Alone (11.7%)	5 & more (14.3%)
Most common length of stay per town	1 night (49.0%)	1 night (46.6%)
	2 nights (14.4%)	2 nights (17.0%)
Mode of transport	Rented car (79.2%)	Rented car (82.8%)
Top information sources	Internet/websites (38.1%)	Internet/websites (39.5%)
	Word of mouth (33.2%)	Word of mouth (27.2%)
Type of accommodation	Guesthouse (8.3%)	B&B (10.1%)
	B&B (7.9%)	Guesthouse (9.7%)
Average spend on accommodation	R1001-R2000 (8.0%)	R1001-R2000 (8.3%)
Average daily spend	R501-R1000 (21.3%)	R501-R1000 (22.2%)
Top three activities undertaken	Scenic drives (20.2%)	Scenic drives (17.7%)
	Culture/heritage (16.9%)	Culture/heritage (16.1%)
	Gourmet restaurants (15.3%)	Outdoor activities (14.2%)

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, Q4 2016		
TOURISM INDICATOR	**Western Cape**	**Gauteng**
% Share overnight visitors	48.5%	64.0%
% Share day visitors	48.5%	34.3%
Age profile of visitors	36-50 (27.2%)	36-50 (26.0%)
Main purpose of visit	Holiday/leisure (80.7%)	Holiday/leisure (85.4%)
	Business (5.1%)	VFR (5.2%)
Most common travel group size	Pairs (34.2%)	Pairs (36.9%)
	Alone (22.2%)	5 & more (24.8%)
Most common length of stay per town	1 night (49.2%)	1 night (55.9%)
	2 nights (20.8%)	2 nights (15.9%)
Most common mode of transport	Own motor vehicle (81.8%)	Own motor vehicle (78.4%)
	Rented car (4.9%)	Rented car (11.3%)
Top information sources	Word of mouth (35.6%)	Word of mouth (44.4%)
	Internet/websites (17.3%)	Internet/websites (18.7%)
Most common type of accommodation	Self-catering (11.1%)	Self-catering (10.5%)
	Guesthouse (6.2%)	Guesthouse (7.9%)
Average daily spend	R201-R500 (20.3%)	R201-R500 (20.8%)
Average spend on accommodation	R501-R1000 (7.4%)	R501-R1000 (7.9%)
Top three activities undertaken in the Cape West Coast	Scenic drives (23.5%)	Scenic drives (28.2%)
	Culture/heritage (16.6%)	culture/heritage (13.5%)
	Gourmet restaurants (11.2%)	Gourmet restaurants (10.7%)

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

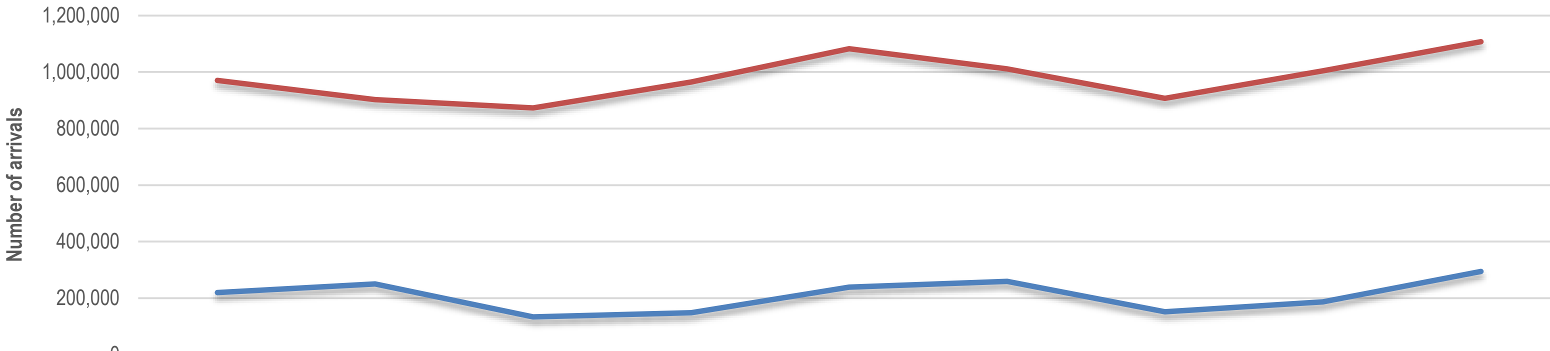
9. Performance of Western Cape Attractions

TOTAL NUMBER OF VISITORS BY PARTICIPATING REGIONAL ATTRACTION, Q4 2014/2015			
ATTRACTIONS	**Q4 2015**	**Q4 2016**	**Q4 15/16 % Change**
Cape Town			
Kirstenbosch Botanical Gardens	283,054	309,755	9.4%
Robben Island	123,097	114,866	-6.7%
V&A Waterfront Shopping Centre	7,174,918	7,170,868	-0.1%
Table Mountain National Park	916,087	1,126,805	23.0%
Table Mountain National Park: Boulders	227,233	267,479	17.7%
Table Mountain National Park: Cape of Good Hope	300,259	353,777	17.8%
Table Mountain Aerial Cableway	362,419	370,734	2.3%
Cape Overberg			
De Hoop Nature Reserve	4,823	9,861	104.5%
De Mond Nature Reserve	10,923	3,038	-72.2%
Cape Agulhas Lighthouse	9,655	12,063	24.9%
Agulhas National Park	11,922	13,206	10.8%
Bontebok National Park	6,678	7,778	16.5%
Harold Porter National Botanical Gardens	5,985	24,013	301.2%
Kogelberg Nature Reserve	9,613	3,220	-66.5%
Stony Point	6,097	28,183	362.2%
Cape Garden Route & Klein Karoo			
Cango Caves	76,538	85,883	12.2%
Wilderness National Park	27,983	39,639	41.7%
Tsitsikamma National Park	105,425	119,730	13.6%
Cape West Coast			
West Coast National Park	73,458	93,376	27.1%
West Coast Fossil Park	4,278	4,362	2.0%
Cape Karoo			
Karoo National Park	12,244	12,479	1.9%

7. Performance of Western Cape Airports: Cape Town International Airport

- Cape Town International Airport is South Africa's second-busiest airport. The airport recorded 293,952 international and 1,107,217 domestic passengers in Q4 2016. Domestic arrivals already reached the 1 million mark during the third quarter of 2016 (1,004,430) and continued to increase into Q4 2016. Across the three years, arrival trends portrayed a consecutive growth rate across both international and domestic arrivals, underlining an equally strong demand for leisure and business travel respectively.

NUMBER OF INTERNATIONAL AND DOMESTIC ARRIVALS THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, Q4 2014-Q4 2016



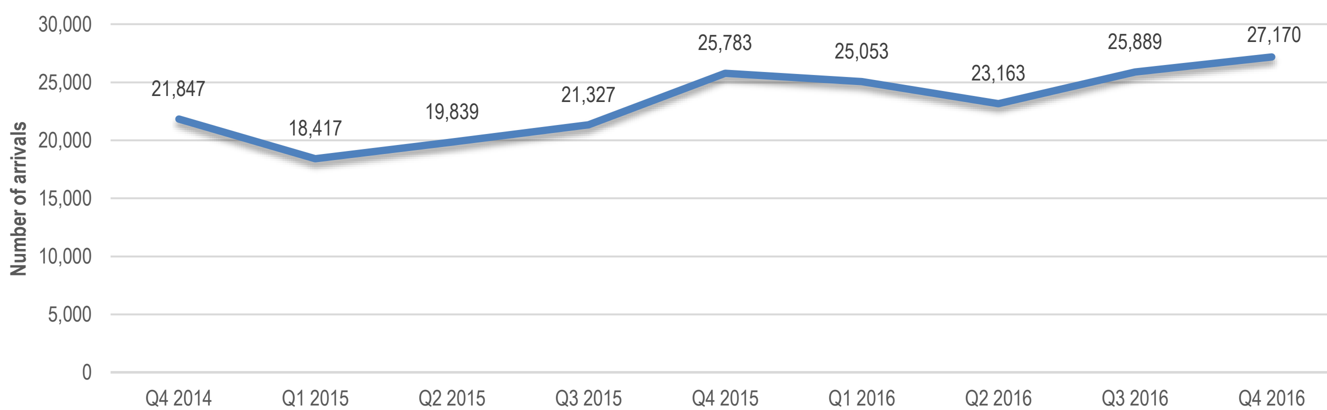
	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016
International Arrivals	219,165	249,845	133,227	148,351	239,411	259,745	151,539	186,709	293,952
Domestic Arrivals	970,208	903,065	872,649	965,126	1,082,409	1,011,438	907,066	1,004,430	1,107,217

Source: ACSA, 2017

- In Q4 2016, a total of 27,170 regional arrivals[1] entered through the Cape Town International Airport, reflecting a 5.4% increase when compared to Q4 2015 (25,783).

- The flow of regional arrivals portrayed a steady growth between 2014 and 2016. Over the three years, Q4 2016 (27,170) saw the highest number of regional arrivals, with a strong peak in passenger movement between October and December each year.

REGIONAL ARRIVALS THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, Q4 2014-Q4 2016

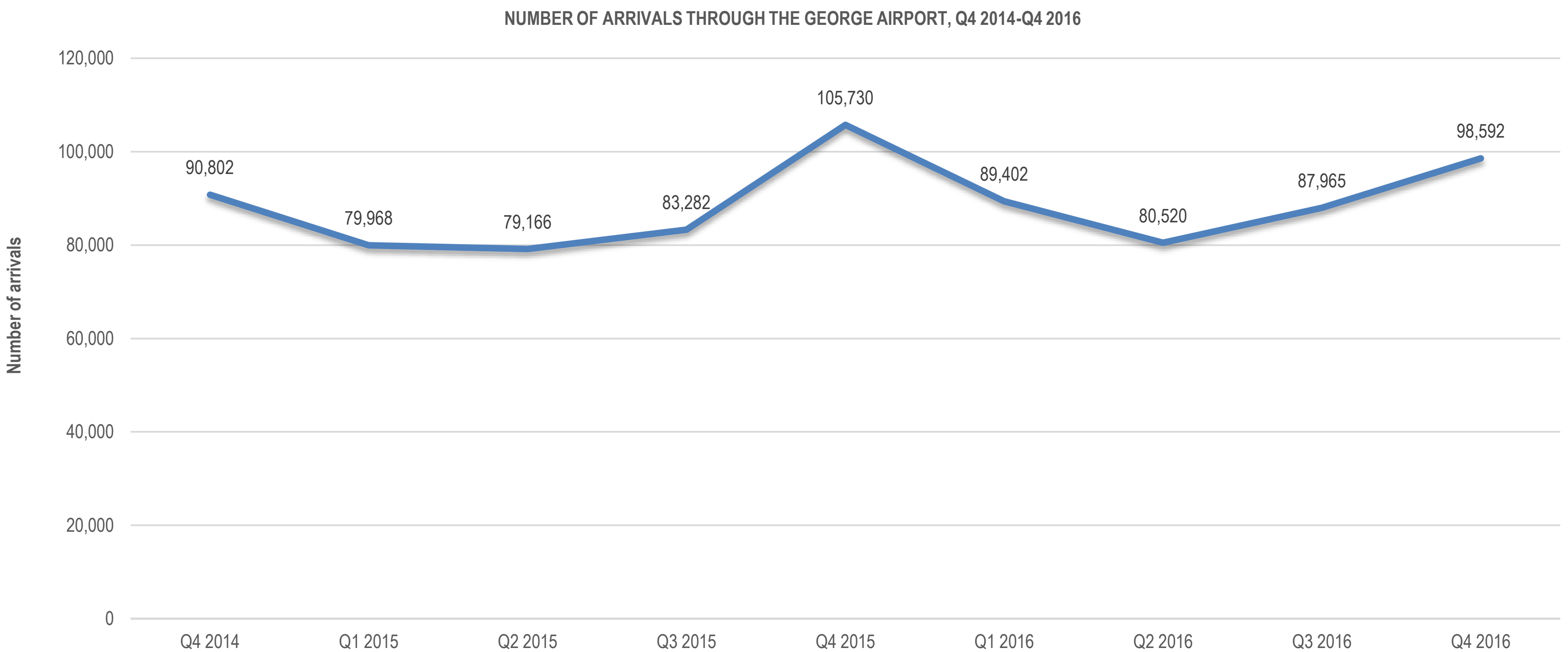


Source: ACSA, 2017

[1]**Regional Arrivals** are defined by the Government Gazette by the landing charge in respect of an aircraft which lands at a company airport that has been engaged in a flight where the airport of departure of that aircraft is Botswana, Lesotho, Namibia or Swaziland.

7. Performance of Western Cape Airports: George Airport

- George Airport is located at the heart of the Western Cape's Cape Garden Route & Klein Karoo; a well renowned holiday destination and home to many of South Africa's most affluent residents. The airport handles over 600,000 passengers each year and the growing attractiveness of the region is anticipated to boost airport traffic even further.
- The airport not only plays a central role in the region's tourist economy, it is also a national distribution hub for cargo such as flowers, fish, oysters, herbs and ferns.
- Despite a marginal year-on-year decrease in passenger arrivals during Q4 2016, the period October to December portrays a strong peak in arrival numbers each year. The significance and economic contribution was underlined when the airport won the "South African Airport of the Year" award six times.



Source: ACSA, 2017

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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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