



## Cape Town Regional Trends

**WESGRO**  
cape town & western cape  
research

2017

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# 1. Methodology

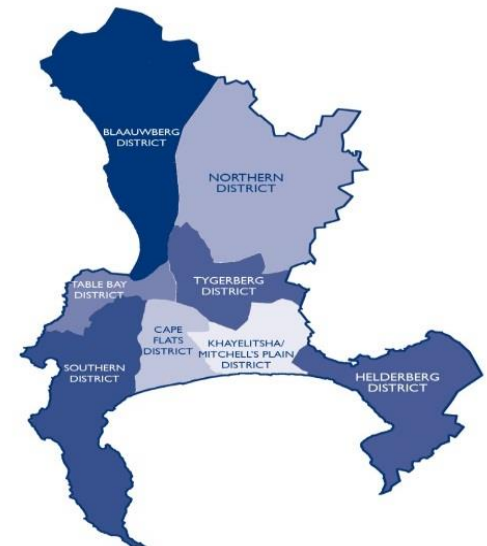
- This report provides an overview of the tourism trends and patterns in Cape Town. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.
- Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western 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.
- Data for the regional visitor tracking survey, from which regional trend data was drawn, was captured when a visitor booked with a consultant (convenience sampling) and only represents part of the visitor population.
- **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

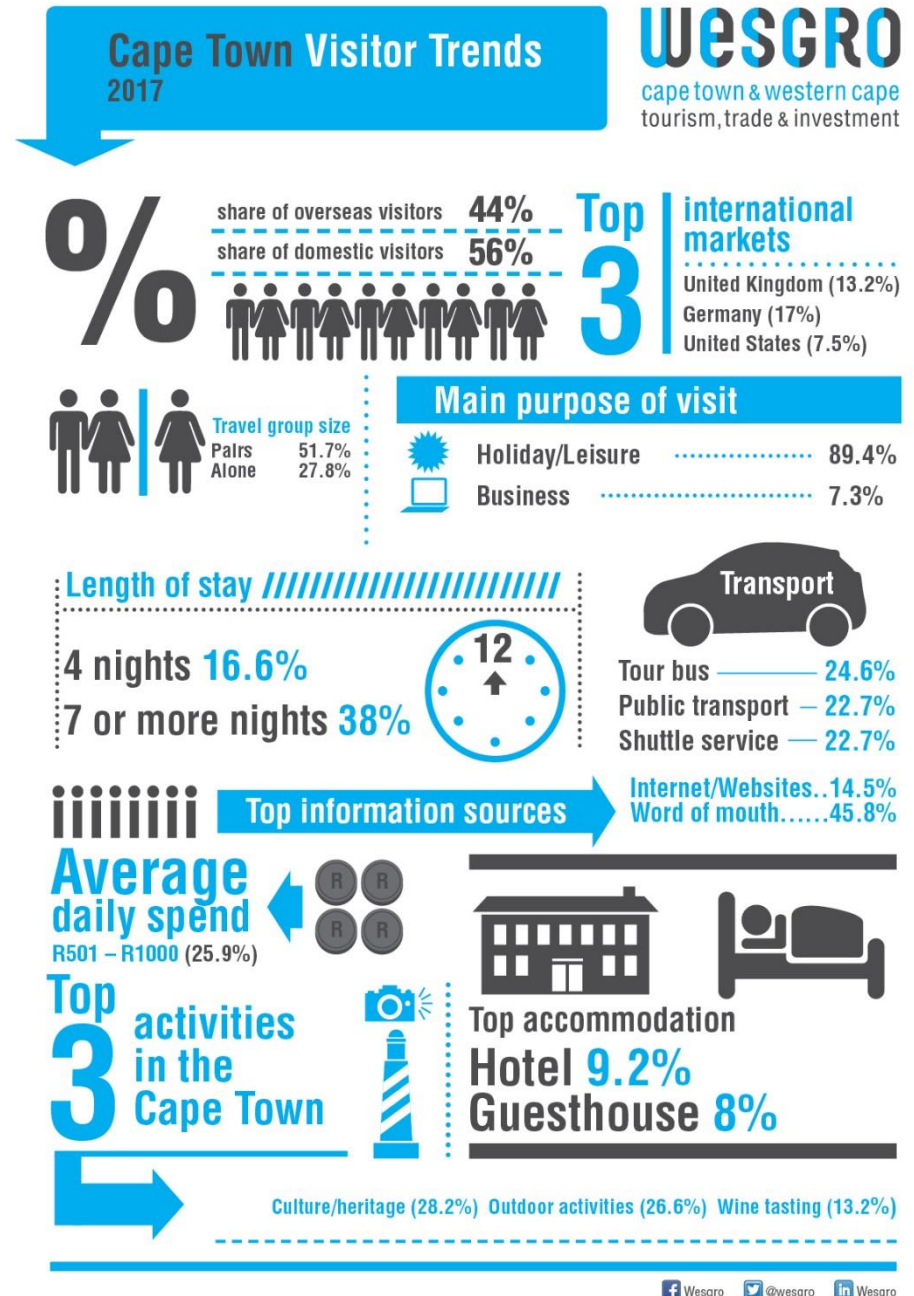
In 2017, a total of **1,636** responses to the regional visitor tracking survey were received from the respective Visitor Information Centres (VICs) in Cape Town. The participating VICs were:

- Cape Town Central (607)
- Cape Town International Airport (288)
- Simons Town (86)
- Long Street (537)
- Southey's Vines (58)
- Kirstenbosch (26) and
- Mobile VIC (34)



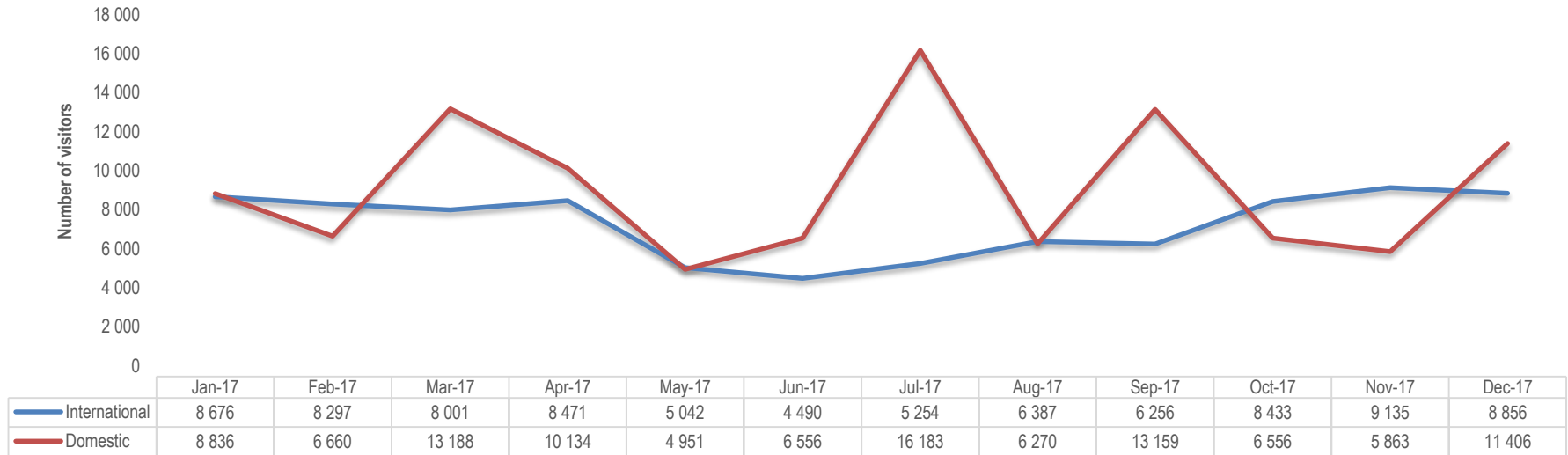
### 3. Executive Summary

- Over 190,000 travellers conducted bookings at the respective Cape Metropole Visitor Information Centres (VICs) in 2017. Visitor engagement at these VICs increased by 14.0% year-on-year. 56.0% (109,762) represented the domestic market and 44% (87,298) originated from overseas.
- Germany (17.0%), the United Kingdom (13.2%) and the United States (7.5%) ranked as Cape Town's top three international markets into the VICs.
- Cape Town continues to hold a strong demand for leisure travel, with holiday/leisure (89.4%) ranking as the leading motivation for travel, followed by business (7.3%).
- Visitors to Cape Town primarily travelled as pairs (51.7%), followed by 27.8% who were solo travellers.
- The city benefits from two major national highways and a strong network of tour operators and guides operating on these routes. Tour busses (24.6%) are a particularly popular form of exploring Cape Town, followed by shuttle services and public transport (22.7% respectively).
- Over 35% of visitors enjoyed extended stays of up to a week and more in the city. A further 16.6% indicated overnight stays of four nights.
- Top accommodation choices included guesthouses and hotels. During the period under review, the Cape Metropole accommodation sector recorded an overall 8.7% increase in their average room rates achieved, and a 7.7% increase in their revenue per available room.
- Word of mouth (45.6%) ranked as the top information source amongst visitors to Cape Town. The internet (14.5%) emerged as an equally strong tool for information. 5.0% of these visitors were return visitors, an extremely important market for industry role-players to tap into and grow.
- In 2017, visitors spent on average R501-R1000 (25.9%) per day in Cape Town, followed by 16.6% who indicated an average daily spend of R1001-R2000.
- The top five activities enjoyed in Cape Town included culture/heritage, outdoor activities, wine tasting, adventure and scenic drives.

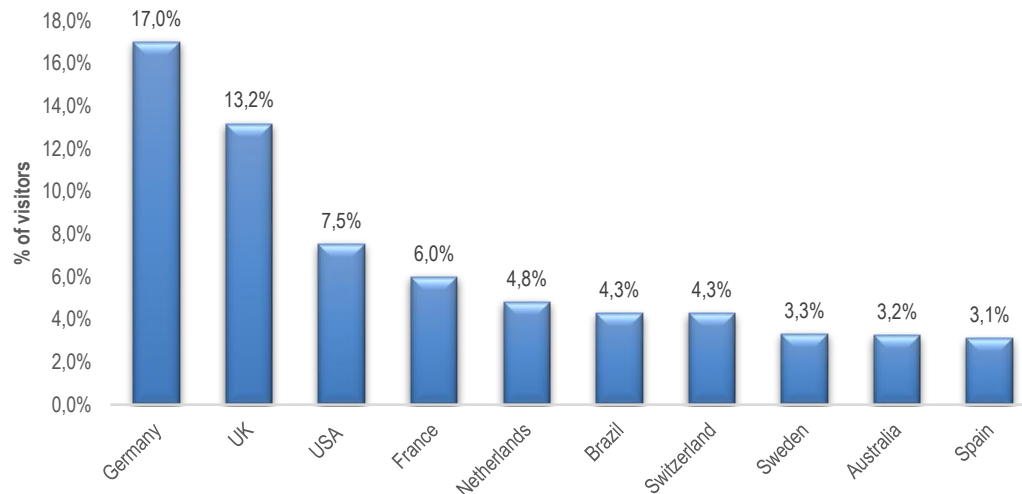


## 4. Cape Town Visitor Trends & Patterns

### 4.1 Total Number of Engagements at the Visitor Information Centres (VICs), 2017



#### TOP 10 INTERNATIONAL MARKETS TO THE CAPE METROPOLE VICs, 2017

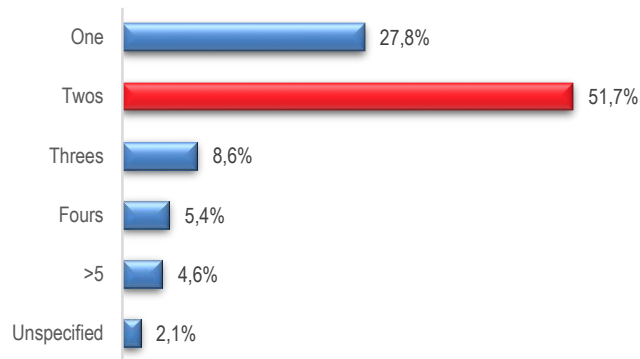


- The Cape Metropole Visitor Information Centres (VICs) recorded a total of 197,060 visitor engagements in 2017.
- Visitor engagements at the VICs increased by a significant 14.0% when compared to 2016 (172,871). While these walk-in numbers do not reflect the total number of tourists to the city, the frequency of walk-ins does portray a strong demand for VICs as an information and booking tool. These trends further demonstrate valuable insights into the markets visiting Cape Town.
- The top five international markets who conducted bookings at the respective Cape Town VICs included Germany (17.0%), the United Kingdom (13.2%), United States (7.5%), France (6.0%) and 4.8% from the Netherlands.

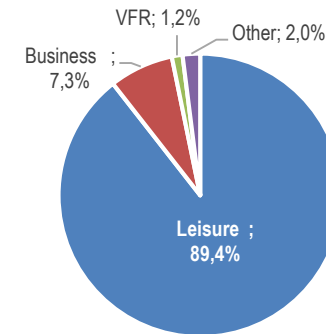
## 4. Cape Town Trends and Patterns

- Most visitors to Cape Town are self-drive couples or pairs. In 2017, around 89% travelled to Cape Town for holiday, with business and visiting friends & relatives (VFR) emerging amongst the top reasons for visits. The top five activities included culture/heritage, outdoor activities, wine tasting, adventure and scenic drives.
- 24.6% indicated tour busses as their top mode of transport. In 2017, tour busses ranked higher than rented cars (14.5%) and own motor vehicles (3.4%), a demand which holds strong benefits for established as well as emerging tour operators. Tours departing from Cape Town to the neighbouring regions, townships and especially to the popular wine routes have grown even more in popularity, a trend evident in these findings.

### 4.2 Travel Group Size

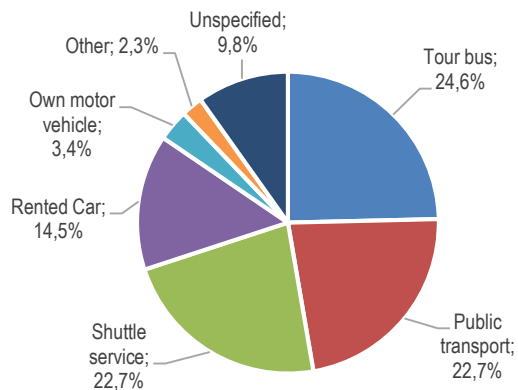


### 4.4 Main Purpose of Visit



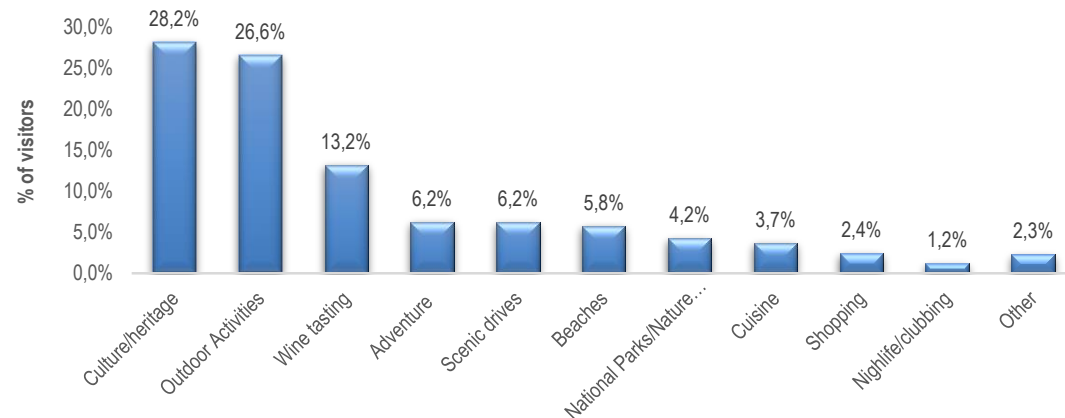
Other: Education, events, honeymoon/weddings, medical, seasonal/migrant worker and sport.

### 4.3 Mode of Transport



Other: Mini bus taxis, train and long distance buses.

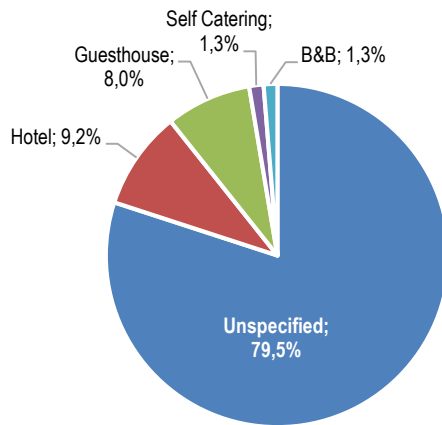
### 4.5 Top Activities Undertaken in Cape Town



Other: Golf, events/festivals, health & wellness, meetings/incentives and whale watching.

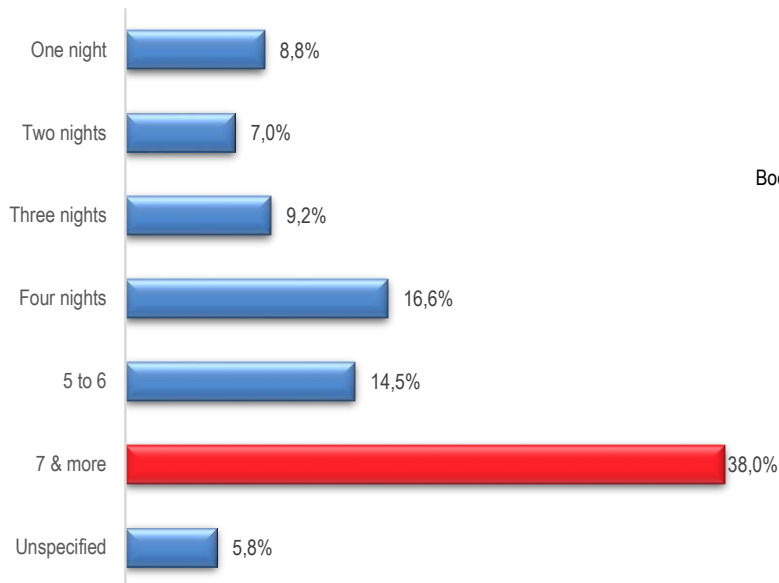
## 4. Cape Town Trends and Patterns

### 4.6 Accommodation Usage

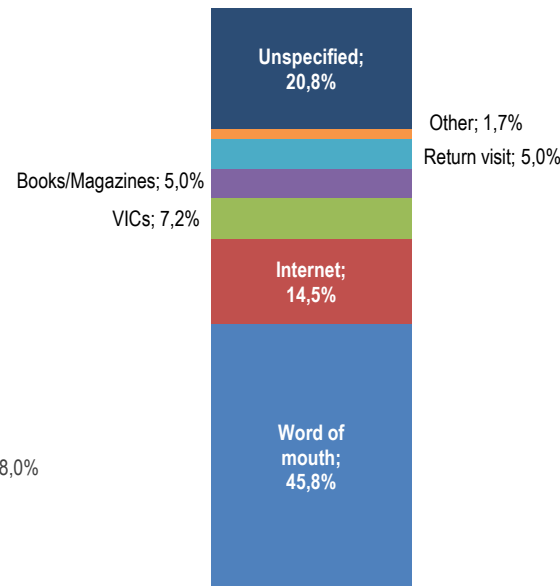


- Hotels (9.2%) and guesthouses (8.0%) ranked as the most prominent accommodation types booked at the VICs.
- The extended stays is further underlined in the trends depicted below, with the largest share of visitors to Cape Town indicating stays of a week and more in Cape Town (38.0%).
- Word of mouth (45.6%) ranked as the top information source amongst visitors to Cape Town. The internet (14.5%) emerged as an equally strong tool for information. 5.0% of these visitors were return visitors, an extremely important market for industry role-players to tap into and grow.
- In 2017, visitors spent on average R501-R1000 (25.9%) per day in Cape Town, followed by 16.6% who indicated an average daily spend of R1001-R2000.

### 4.7 Average Length of Stay

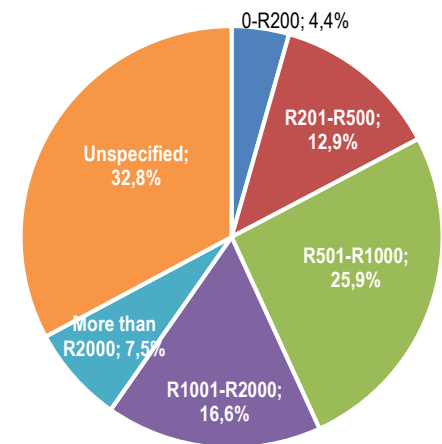


### 4.8 Information Sources



Other: Brochures, media and travel agents/operators.

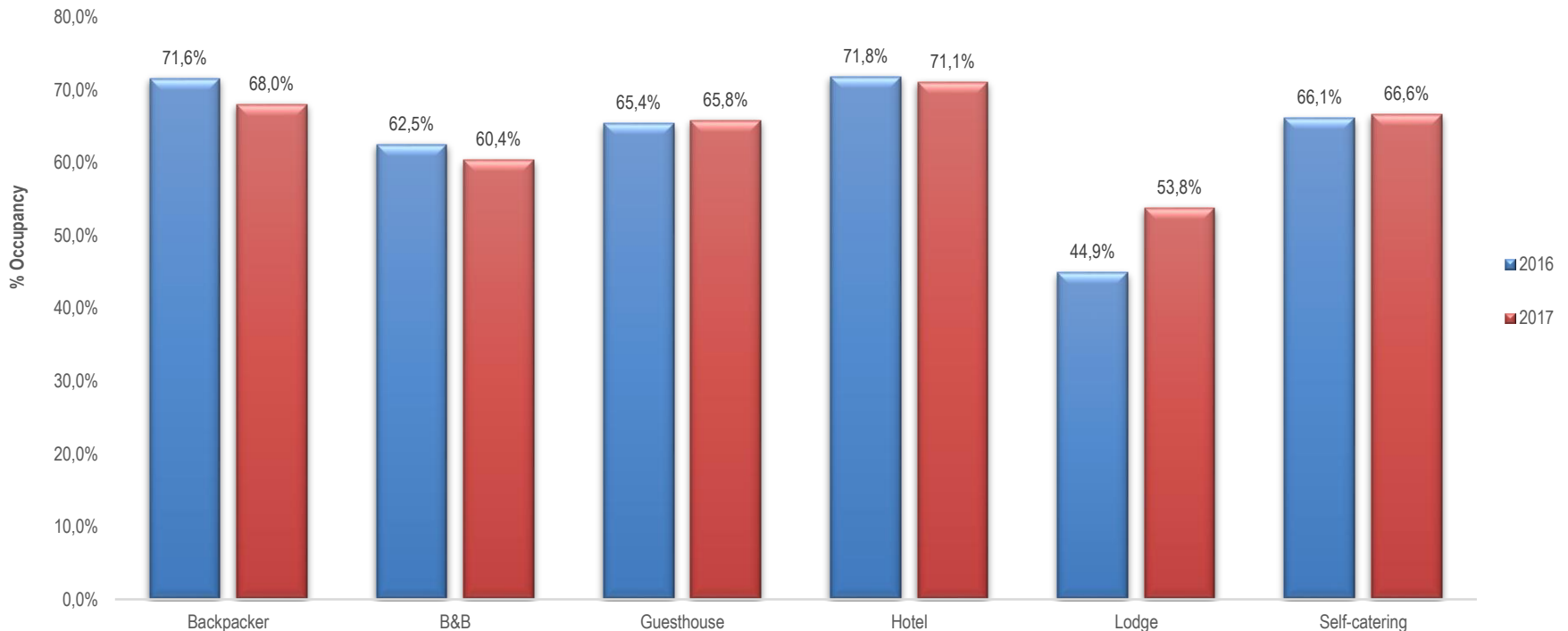
### 4.9 Average Daily Spend



## 6. Cape Town Accommodation Performance

- Horwath HTL, on behalf of Cape Town Tourism, conducted a performance review and forecast study amongst respective accommodation establishments within the Cape Metropole. The establishments that participated in the analysis were located across the City Centre, Helderberg, South Peninsula, Northern and Southern Suburbs, Blaauwberg Coast and the Atlantic Seaboard. The participating establishments included guesthouses, hotels, self-catering, B&Bs and backpackers.
- Overall, Cape Town's accommodation sector is performing extremely well and maintained a strong demand in 2017. During the period under review, the Cape Metropole accommodation sector recorded an overall 8.7% increase in their average room rates achieved, and a 7.7% in their revenue per available room.
- Accommodation demand provides an insightful measure of the performance of Cape Town's tourism sector. When observing the annual occupancy levels illustrated below, the respective accommodation types recorded occupancy levels ranging between 60% and 70%. The best performing accommodation types for the highest occupancy levels in 2017 was hotels and backpackers.
- The top accommodation types with respect to year-on-year growth in occupancy was lodges, guesthouses and self-catering establishments.

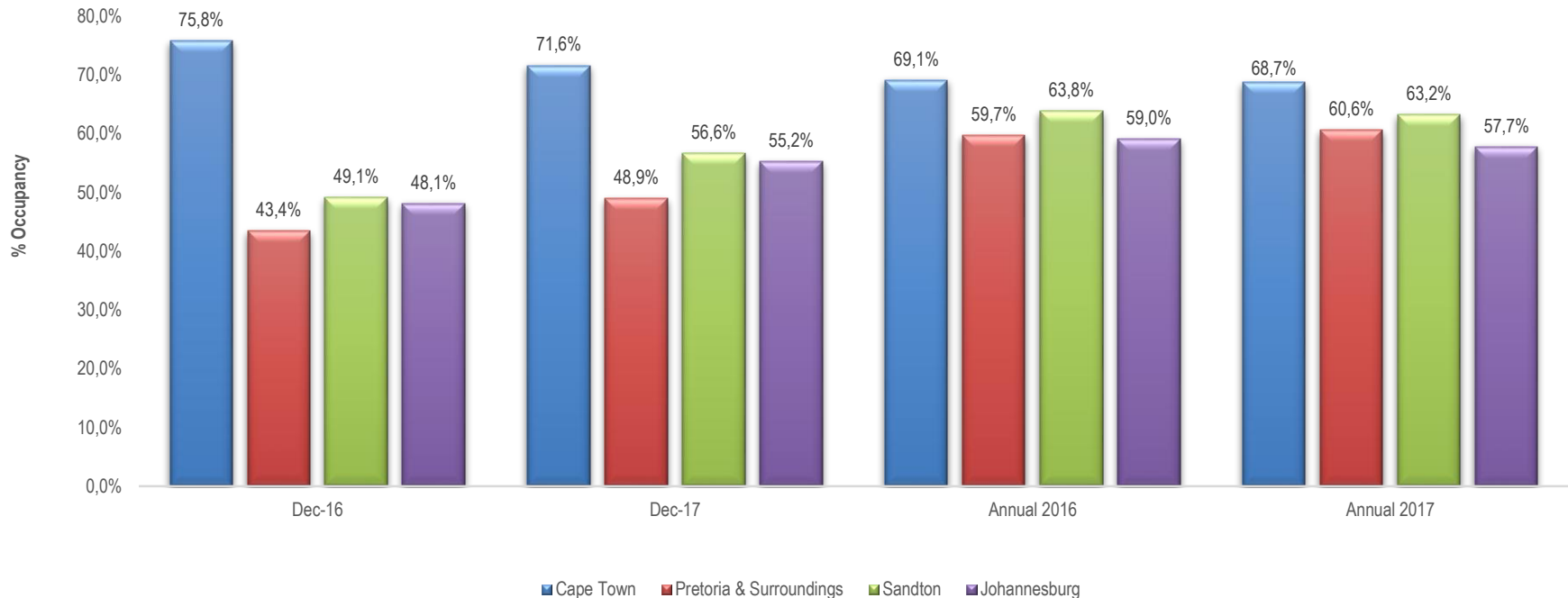
% OCCUPANCY ACHIEVED IN THE CAPE METROPOLE, 2016/2017



## 6. Benchmarking Cape Town's Hotel Sector

- Over the forecast period to 2021, Business Monitor International (BMI) is projecting steady growth in the number of hotels and other accommodation establishments in South Africa, averaging 4.6% between 2017 and 2021. At the present time, investor attention remains largely focused on the major cities of Cape Town, Johannesburg, Durban and Pretoria. However, BMI believes there could also be scope for major hotel chains to look beyond the major cities for additional investment opportunities.
- The Western Cape secured 8 new hotel investments, of which 3 were opened by Marriott International alone. These investments added over 1,300 new rooms to the Western Cape's accommodation stock. The increase in hotel supply reflects the continuing demand in South Africa, and more so Cape Town and the Western Cape, and demonstrates the growing confidence that investors and hotel developers have in the Western Cape's tourism sector.
- As depicted in the figure below, Cape Town ranked as the top city in hotel occupancy levels against Pretoria, Sandton and Johannesburg. Cape Town maintained a strong demand not only during the month of December, but ranked as the top performing city in the 2017 annual outlook.

HOTEL OCCUPANCY RATE BY CITY, 2016/2017

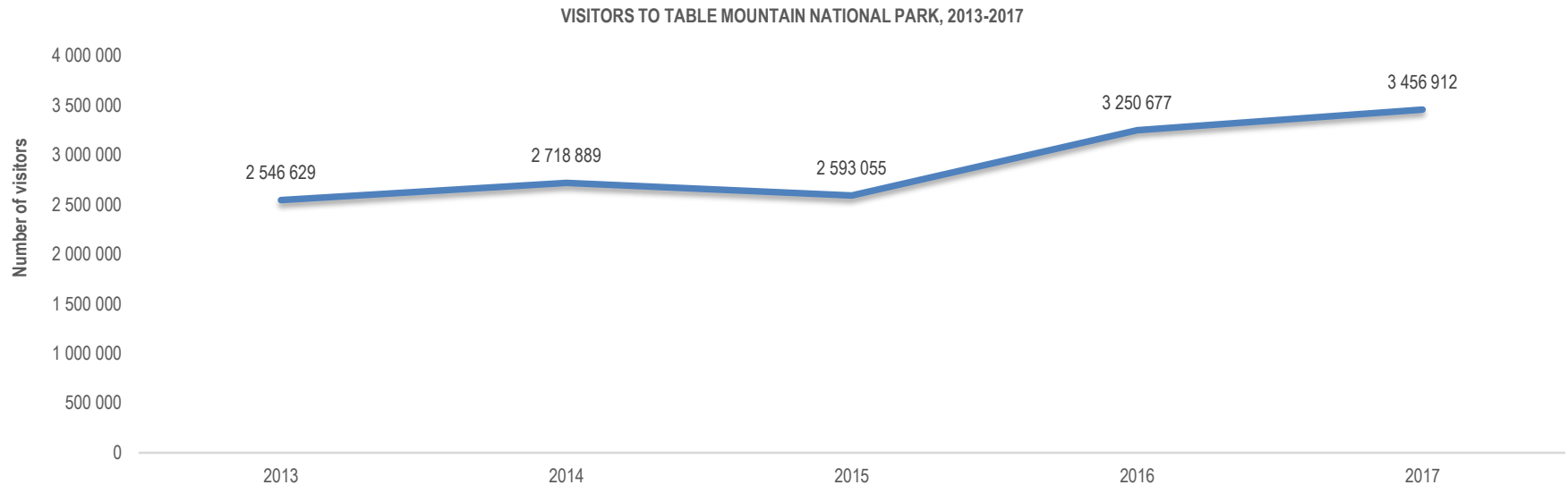


## 5. Performance of Cape Town Attractions

| Ranking | Attraction                                      | Total visitors 2017 | 16/17 % Change |
|---------|---|---------------------|----------------|
| 1       | V&A Waterfront                                  | 24,051,001          | -2,3%          |
| 2       | Table Mountain National Park                    | 3,456,912           | 6.3%           |
| 3       | Table Mountain Aerial Cableway                  | 1,185,452           | 5.3%           |
| 4       | Table Mountain National Park: Cape of Good Hope | 1,184,413           | 8.7%           |
| 5       | Kirstenbosch National Botanical Garden          | 968,004             | 2.1%           |
| 6       | Table Mountain National Park: Boulders          | 923,625             | 12.9%          |
| 7       | Robben Island                                   | 351,332             | -6.3%          |

Sources: V&A Waterfront, Table Mountain National Park, SANParks, Table Mountain Aerial Cableway, Robben Island and Kirstenbosch National Botanical Garden, 2018

- For this section, visitor movement to Cape Town's top attractions were reviewed. These include the city's most iconic attractions for which visitor statistics were available.
- The attractions highlighted in this section includes the renowned Table Mountain Aerial Cableway, Kirstenbosch National Botanical Garden, Boulders Beach, Cape of Good Hope, Robben Island and the prominent V&A Waterfront Shopping Centre.
- In 2017, Table Mountain National Park reached a total of 3,456,912 visitors, growing by 6.3% year-on-year.
- The park not only reached its 3 million mark for the first time in 2016 but are continuing to portray impressive growth rates in 2017. These figures highlight the strong demand and sustainability of this iconic attraction.
- SANParks (South African National Parks) is also the biggest tourism product owner in South Africa. SANParks offers a total of 6,787 formal beds and 8,643 camping beds throughout the national parks. The national park system therefore provides a wide diversity of accommodation facilities and eco-tourism experiences, and is one of the cornerstones of the South African tourism economy.

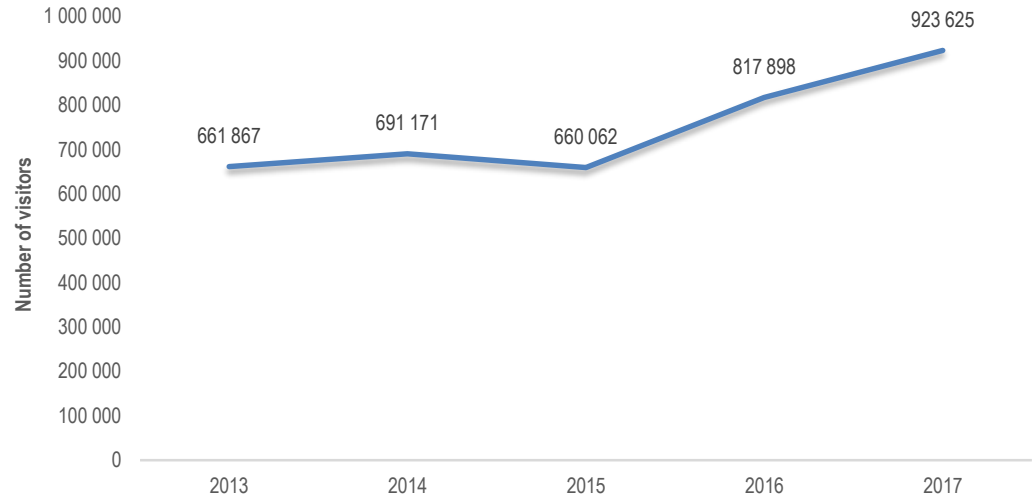


Source: SANParks, 2018

## 5. Performance of Cape Town Attractions

- The local inhabitants at Boulders Beach knows how to pull the crowds. Boulders attracted over 900,000 visitors in 2017, increasing by 12.9%.
- The African Penguins can be found from southern Namibia all the way around the South African coast to Port Elizabeth; however, few places offer as remarkable a viewing point as Boulders Beach.
- Across the five year period (2013-2017), visitors to Boulders grew by a remarkable 40%, confirming the unique and prevalent nature of this attraction.

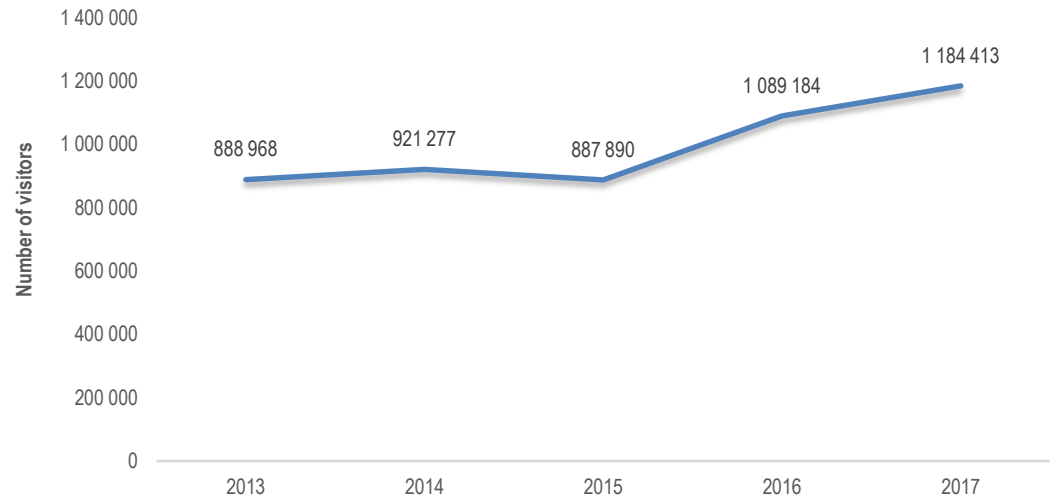
VISITORS TO THE TABLE MOUNTAIN NATIONAL PARK: BOULDERS, 2013-2017



Source: Table Mountain National Park, 2018

- The Cape of Good Hope nature reserve within Table Mountain National Park forms part of the Cape Floral Region, a World Heritage Site. It includes the majestic Table Mountain chain, which stretches from Signal Hill to Cape Point, coupled with the coastlines of the Cape Peninsula.
- This narrow stretch of land contains a mix of extraordinarily diverse and unique fauna and flora. 2017 was a strong year for this prominent attraction, the Cape of Good Hope not only reached its 1 million mark in 2016, but maintained a strong demand into 2017, increasing by 8.7% year-on-year.

VISITORS TO THE TABLE MOUNTAIN NATIONAL PARK: CAPE OF GOOD HOPE, 2013-2017

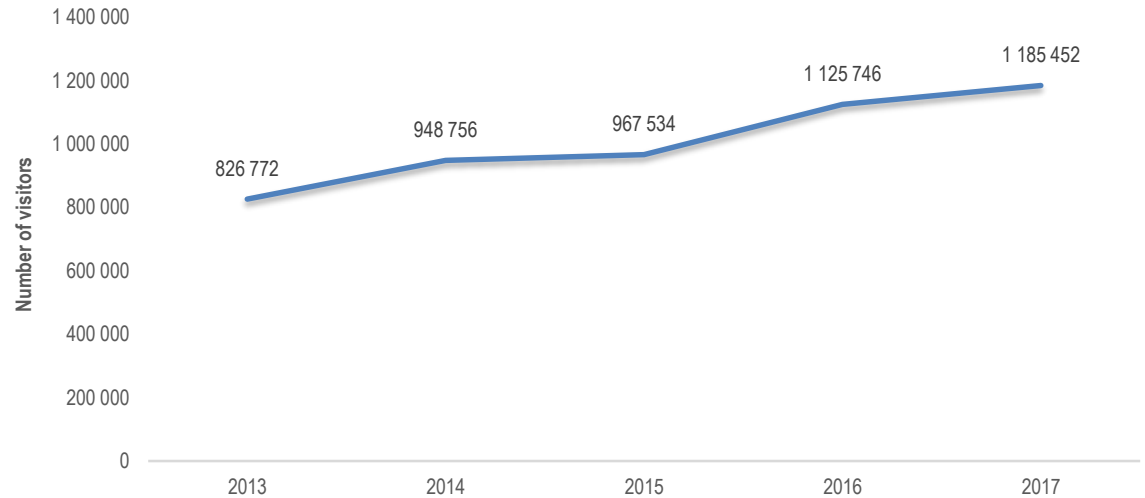


Source: Table Mountain National Park, 2018

## 5. Performance of Cape Town Attractions

- Despite being a weather permitting attraction, the Cableway reached their 1 million mark in 2016 and has proven to be a strong icon for Cape Town, maintaining a solid share of visitors in 2017.
- While seasonality patterns still exists, the Cableway saw a 5.3% increase in visitors during 2017. The Aerial Cableway also demonstrated a consecutive annual growth since 2013, confirming its strength and sustained demand.

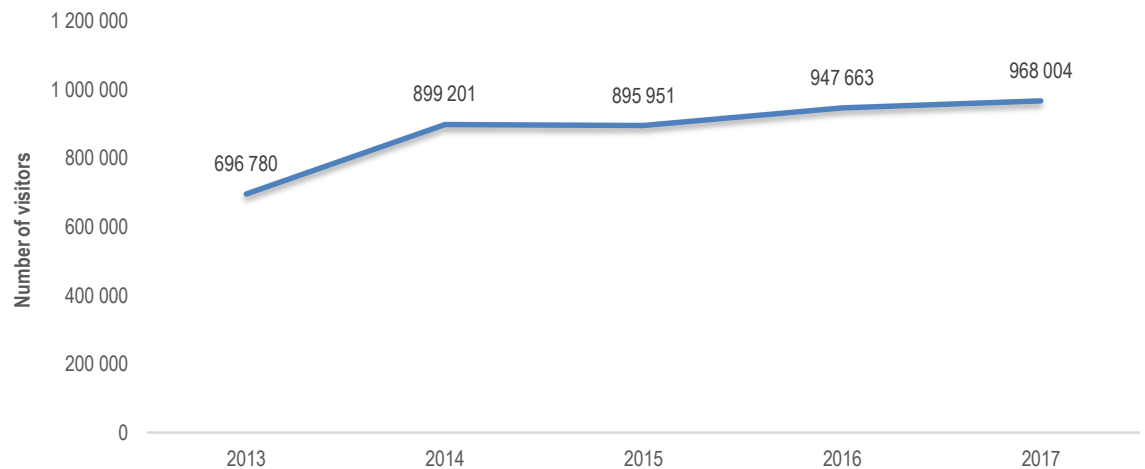
VISITORS TO TABLE MOUNTAIN AERIAL CABLEWAY, 2013-2017



Source: Table Mountain Aerial Cableway, 2018

- In 2004 the Cape Floristic Region, including Kirstenbosch, was declared a UNESCO World Heritage Site, another first for Kirstenbosch. It is the first botanic garden in the world to be included within a natural World Heritage Site.
- In 2017 Kirstenbosch welcomed a total of 968,004 visitors and grew by 2.1% when compared to 2016. It is important to note that the visitor numbers illustrated in the figure excludes concerts. Events such as the summer sunset concerts amongst others therefore serves as additional volume and economic contribution to the garden.

VISITORS TO KIRSTENBOSCH NATIONAL BOTANICAL GARDEN, 2013-2017

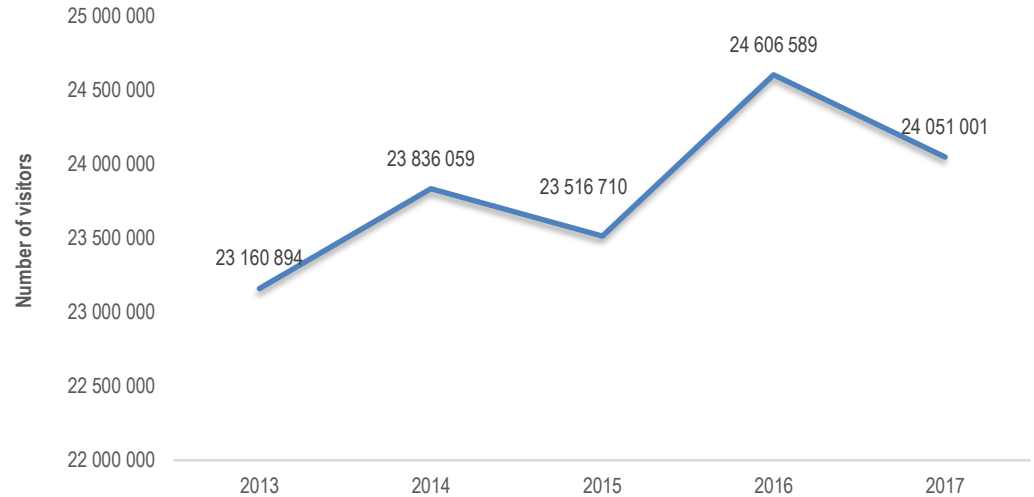


Source: Kirstenbosch National Botanical Garden, 2018

## 5. Performance of Cape Town Attractions

- The V&A forms part of the Cape Town-BIG 7 and welcomed over 24 million visitors to the shopping centre in 2017. The strength in foot count is largely attributed to the vast array of experiences at the V&A Waterfront, ranging from leisure and shopping to family entertainment.
- With the V&A's development of the various districts (e.g. Silo, Portwood, Watershed) they have experienced an increase in the amount of visitors who expand their geographical footprint on the property, therefore not only visiting the shopping centre, but visiting the V&A for other reasons, e.g. Two Oceans Aquarium and Watershed.

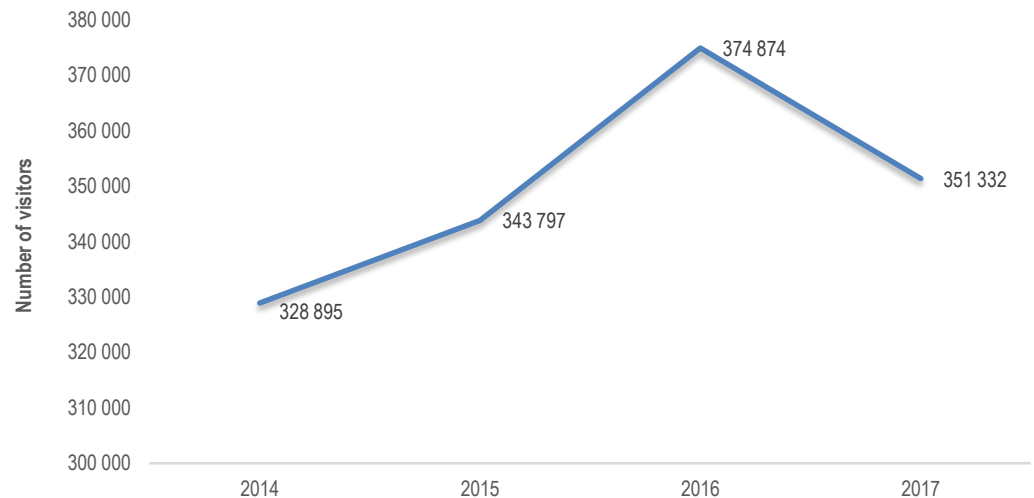
FOOTCOUNT TO THE V&A WATERFRONT SHOPPING CENTRE, 2013-2017



Source: V&A Waterfront, 2018

- Robben Island forms part of the best of Cape Town-BIG 7 attractions, a World Heritage Site and one of the few icons that bear the weight and historical significance of South Africa.
- Robben Island recorded over 300,000 visitors per annum and welcomed a total of 351,332 visitors in 2017. A decrease of 6,3% were recorded for the period, however, this could largely be linked to weather conditions impacting on the frequency of trips to the island.

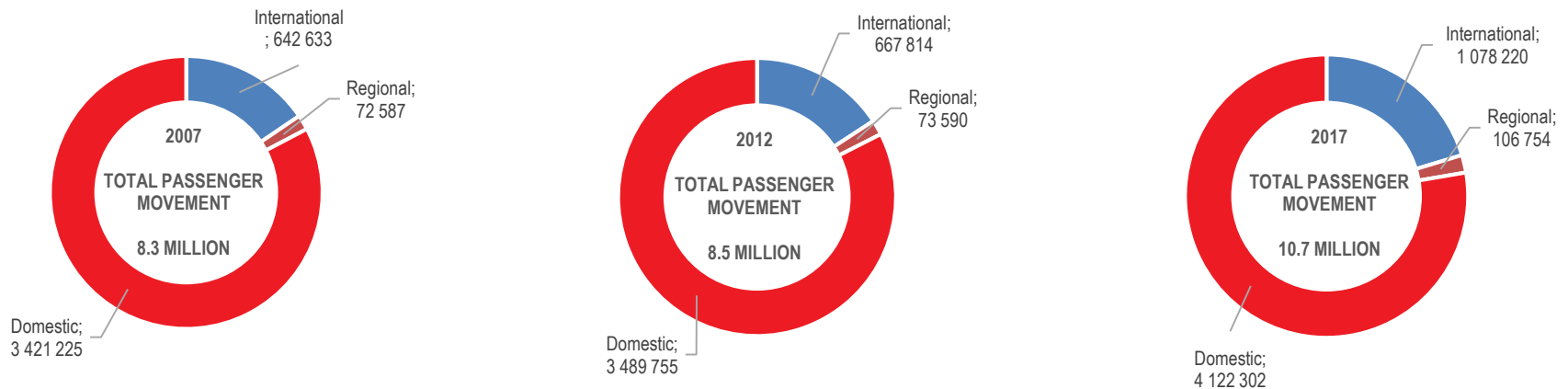
VISITORS TO ROBBEN ISLAND, 2013-2017



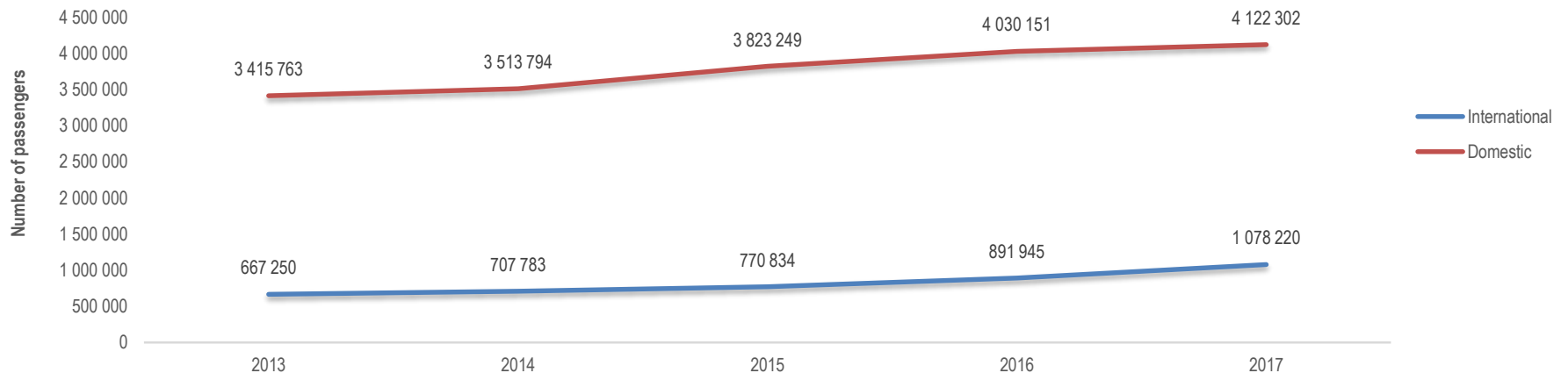
Source: Robben Island, 2018

## 7. ACSA: Cape Town International Airport Arrivals

- International connectivity is key to growing tourism in the Western Cape. Cape Town International Airport is Africa's most award winning airport and was voted the best airport in Africa, **Skytrax 2017 (19<sup>th</sup> in the world)**. As Africa's **3rd largest airport** it records passenger movement of **over 10 million** annually.
- The last 10 years has seen dramatic growth in passenger traffic at the Cape Town International Airport. Total passenger movement (arrivals and departures) reached the 10 million mark in 2016, and continued to show remarkable growth in 2017 (10.7 million). International arrivals through the Cape Town International Airport increased by 20.9% in 2017 year-on-year, this can largely be attributed to the number of new routes which have been secured.



INTERNATIONAL AND DOMESTIC VISITOR MOVEMENT THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, 2013-2017



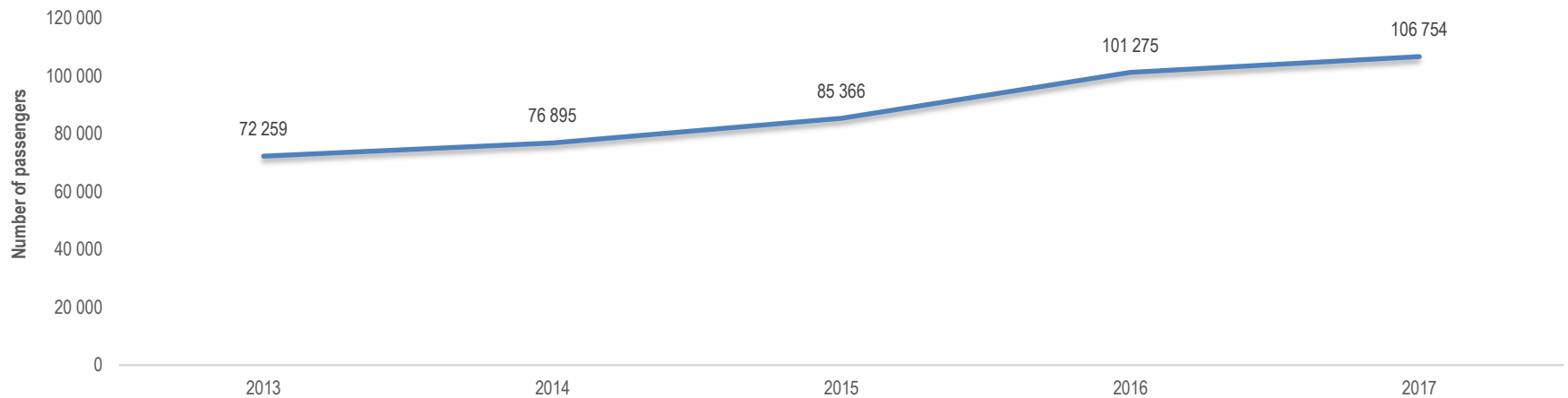
## 7. ACSA: Cape Town International Airport Arrivals

In terms of regional flight connections, Cape Town International airport carries out regional flights via Johannesburg OR Tambo and offers the following direct regional flights:

**The Cape Town airport serves as a key port of connectivity to other cities within Africa with:**

- 10 times a week direct flight to Addis Ababa, Ethiopia
- 7 times a week direct flight to Maun, Botswana
- 3 times a week direct flight to Gaborone, Botswana
- 13 times a week direct flight to Walvis Bay, Namibia
- 35 times a week direct flight to Windhoek, Namibia
- 3 times a week direct flight to Livingstone, Zambia
- 7 times a week direct flight to Luanda, Angola
- 2 times a week direct flight to Mauritius Island, Mauritius
- 3 times a week direct flight to Victoria Falls, Zimbabwe

REGIONAL ARRIVALS THROUGH THE CAPE TOWN INTERNATIONAL AIRPORT, 2013-2017



<sup>1</sup>**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.

Source: ACSA, 2018

## 8. 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 Visitor Information Centres (VICs) in the Cape Metropole:

- Cape Town Central
- Cape Town International Airport
- Kirstenbosch
- Simon's Town
- Southey's Vines
- Mobile VIC
- Long Street

The participating indicators and attractions in Cape Town:

- Kirstenbosch National Botanical Garden
- Table Mountain Aerial Cableway
- Table Mountain National Park: Boulders and Cape of Good Hope
- V&A Waterfront
- South African National Parks Board
- Table Mountain National Park
- Robben Island
- ACSA: Cape Town International Airport

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