



Cape Garden Route & Klein Karoo Visitor Trends

Wesgro
cape town & western cape
research

2019

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1. Methodology

This report provides an overview of the tourism trends and patterns in the Cape Garden Route & Klein Karoo. 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 December 2019, a total of **5156** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Cape Garden Route & Klein Karoo. The participating Tourism Offices were:

Oudtshoorn	1367
Uniondale	1147
Knysna	778
Wilderness	690
George	560
Plettenberg Bay	488
Calitzdorp	102
Pacalsdorp	24



3. Executive Summary

- Visitor surveys conducted between January and December 2019 reflected a fair number of international visitors with 48,4% of all visitors to the Cape Garden Route & Klein Karoo indicating to be overseas visitors.
- The top international markets to the region were Germany (32,1%), United Kingdom (17,8%), and Netherlands (8,4%).
- The Western Cape ranked as the top province to the region with 31,4% of domestic travellers originating from the Western Cape.
- The age profile indicates that visitors were predominantly in the 36 – 50 (25,3%) and 21 – 35 (17,9%) age categories.
- Group travel was preferred with 17,9% of respondents indicating that they were travelling in pairs and a further 25,3% indicated that they were traveling in groups of three or more.
- Respondents indicated own motor vehicle (41,8%), and rented car (37,0%) as their preferred choice of transport to the region.
- The vast majority of respondents (74,0%) cited holiday/leisure as the main purpose of their journey which affirms the region as a favourable holiday destination.
- Scenic drives was considered the main activity for 22,2% of travellers. In addition visitors cited culture/heritage (14,9%) and outdoor activities (14,7%) amongst the top activities undertaken in the Cape Garden Route & Klein Karoo.
- Day visitors accounted for 21,4% of travellers to the region and 78,6% of visitors stayed overnight.
- Overnight visitors spent an average of 1 night (27,2%), 2 nights (29,0%) or 3 nights (10,0%) in the Cape Garden Route & Klein Karoo.
- Self-catering (27,1%) and Guesthouse (25,6%) were the preferred accommodation types amongst respondents.
- Internet (28,6%) and word of mouth (14,4%) were the two main sources used by visitors to obtain information about the region.
- Cape Garden Route & Klein Karoo attractions (Cango Caves, and Tsitsikamma, Wilderness, and Knysna National Parks) received a total of 729 128 visitors over the period January to December 2019.

Cape Garden Route & Klein Karoo Visitor Trends 2019

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tourism, trade & investment

0%

share of overseas visitors	48.4%
share of domestic visitors	51.6%
share of overnight visitors	78.6%
share of day visitors	21.4%

Top 3

international markets

United Kingdom (17.8%)
Germany (32.1%)
Netherlands (8.4%)

Top 3

domestic markets

Gauteng (10.7%)
Western Cape (31.4%)
Eastern Cape (14.8%)

Main purpose of visit

	Holiday/Leisure	74%
	Sport	8.6%
	Events	6.9%



Travel group size
Groups of 3 25.3%
Pairs 17.9%

Length of stay

1 night 27.2%
2 nights 29%
3 nights 10%



Transport
Rented car 37%
Own vehicle 41.8%

Age group
36-50 (25.3%)
21-35 (17.9%)

Top information sources

Internet/Websites...28.6%
Word of mouth.....14.4%

Top 3

activities in the Cape Garden Route & Klein Karoo



Top accommodation

Self Catering 27.1%
Guesthouse 25.6%

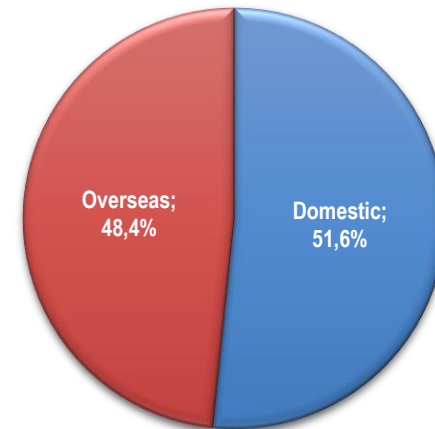
Scenic drives (22.2%) Culture (14.9%) Outdoor activities (14.7%)

4. Cape Garden Route & Klein Karoo Trends & Patterns

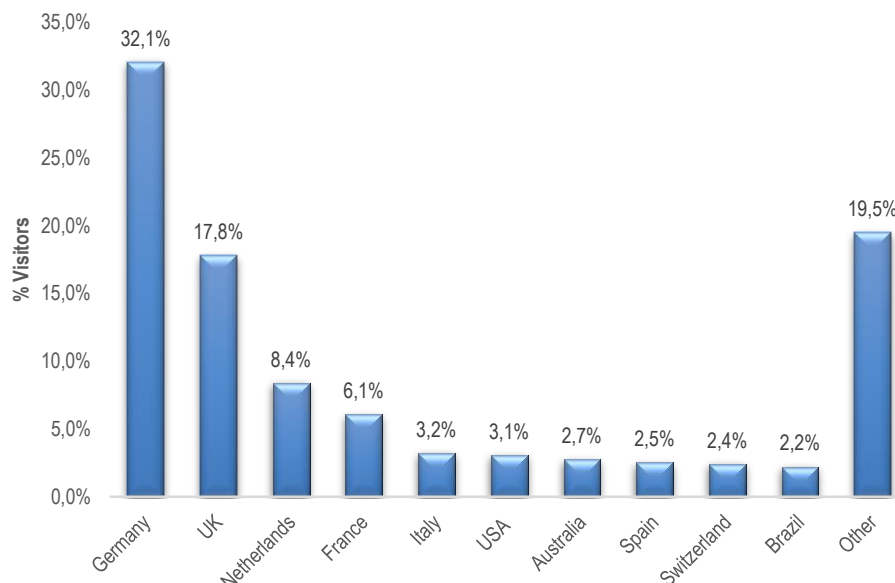
4.1. Origin of visitors

- Overseas visitors made up 48,4% of travellers to the Cape Garden Route & Klein Karoo over the Jan – Dec 2019 period.
- Traditional markets such as Germany and the United Kingdom ranked as the region's top two international markets.
- European travellers continue to drive tourism activity in the Cape Garden Route & Klein Karoo. In addition to Netherlands, France, Italy, Spain and Switzerland, the vast majority of countries grouped under the 'Other' category are European.
- In addition, the region saw visitors traveling from South American countries such as Argentina, Brazil, Colombia, Chile and Mexico, as well as Dubai, and Israel in the Middle East, and Australia and New Zealand in the Australasian region. India and China were the leading markets from the Asian continent.
- Of the 2662 South African respondents 31,4% indicated to be from the Western Cape, 14,8% were from the Eastern Cape and 10,7% of respondents were from Gauteng. 32,2% of respondents who indicated to be from South Africa did not specify the province where they originated from.

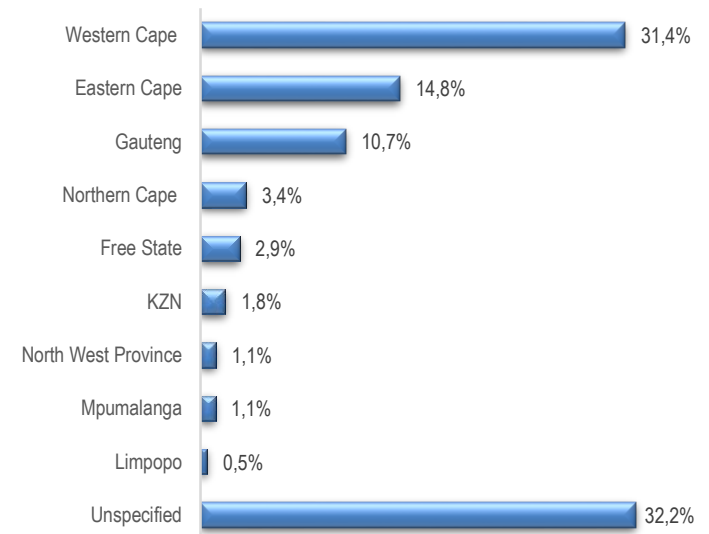
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2019



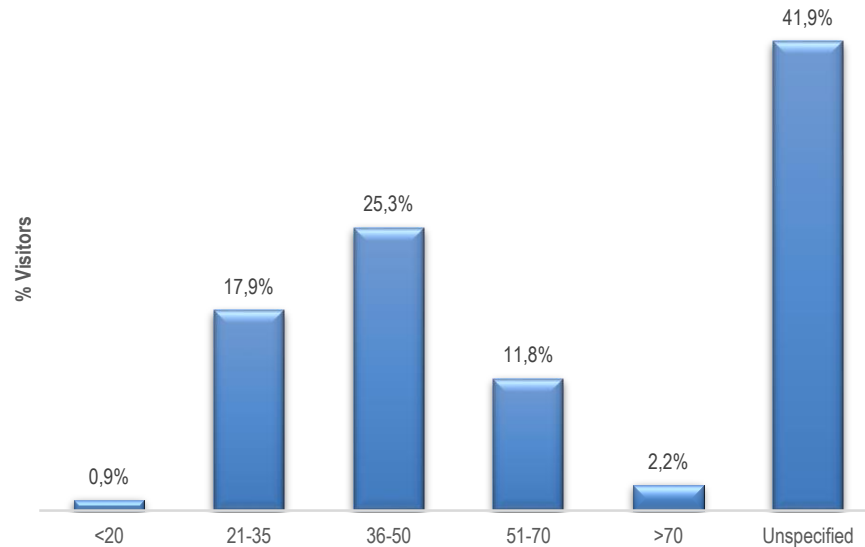
TOP INTERNATIONAL VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2019



% SHARE OF DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2019

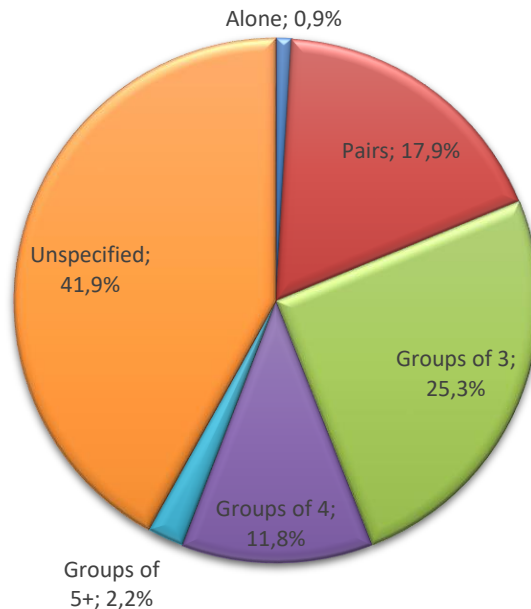


4.2 Age Profile of Visitors

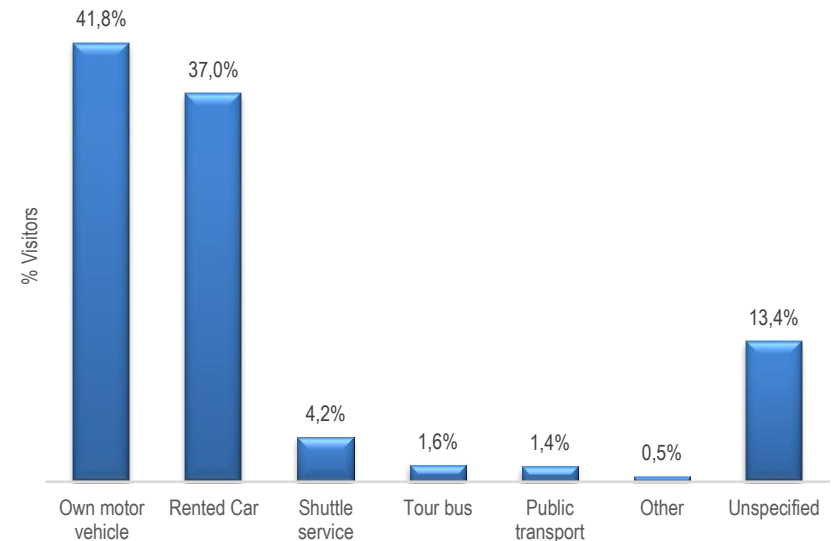


- The leading age group, was between the ages of 36 and 50 years (25,3%). A further 17,9% of respondents were between the ages of 21 and 35 years.
- Group travel was preferred with majority of respondents travelling in pairs (17,9%) and in groups of three. (25,3%).
- Single travellers accounted for close to 1% of respondents which may be attributed to travel for business or educational purposes.
- Of the 5156 tourists surveyed, 41,9% did not specify their age category. The results, however, are still consistent with previous years'.
- Majority of respondents travelled to the region via rented cars (41,8%) or own motor vehicles (37,0%). A small minority travelled via shuttle service (4,2%), tour bus (1,6%), and public transport (1,4%). Other modes of transport (0,5%) included long distance bus, mini bus taxi, motorbike, and metered taxi.

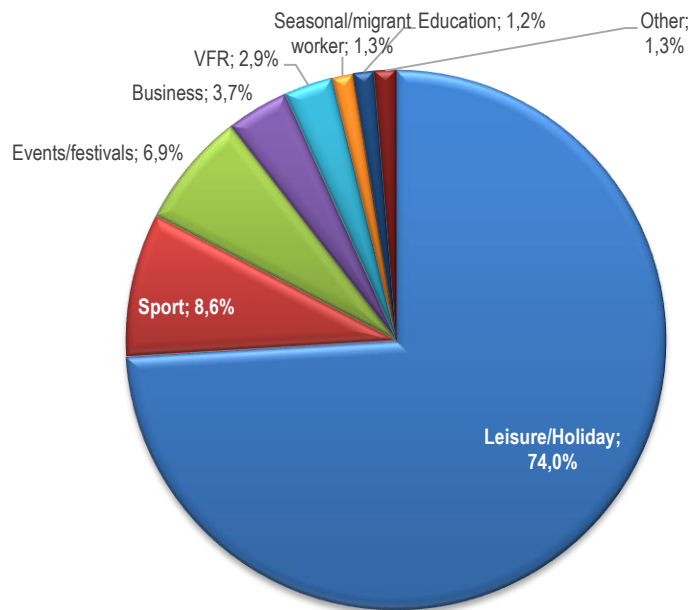
4.3 Group size



4.4 Mode of transport

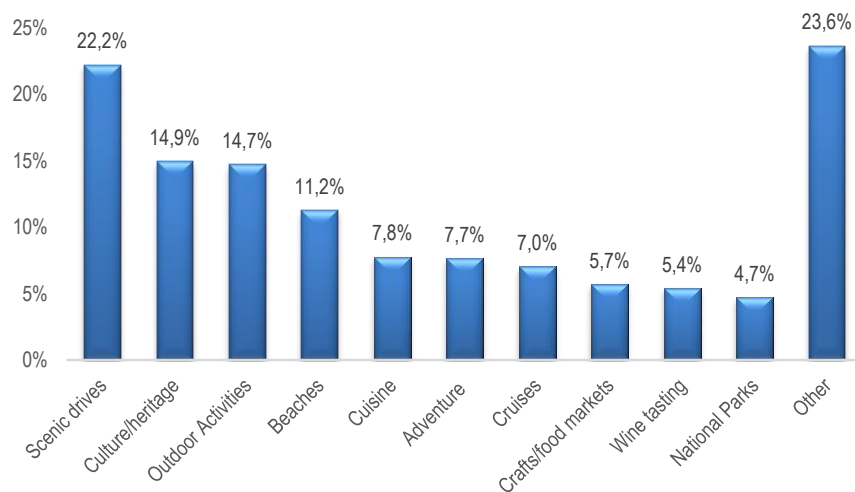


4.5 Main purpose of visit

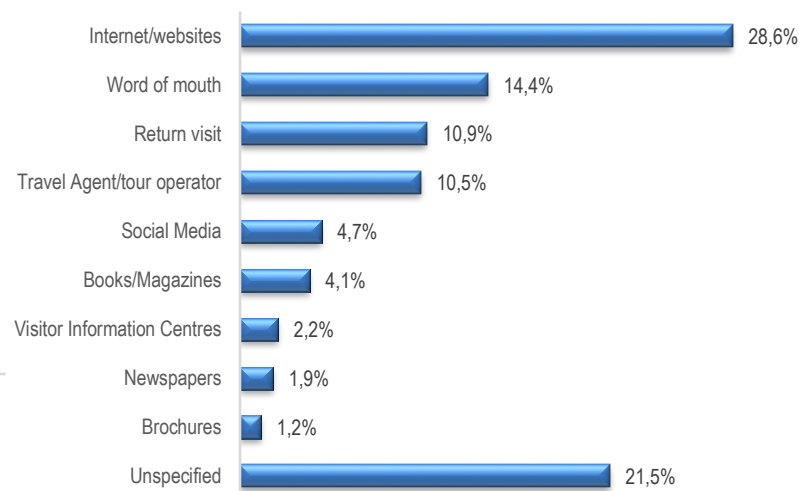


- The most prominent motivating factor for travel to the Cape Garden Route & Klein Karoo was for the purpose of holiday/leisure (74,0%).
- Travel for sport (8,6%), and events/festivals (6,9%) ranked as part of the top 3 reasons for visiting the Cape Garden Route & Klein Karoo.
- Scenic drives (22,2%), culture/heritage (14,9%), and outdoor activities (14,7%) were the top 3 activities undertaken in the region.
- Activities under the 'other' category included shopping, whale watching, golf, health & wellness, business, game reserves, events, sport, nightlife/clubbing, birding, ostriches, cycling, fishing, expos/exhibitions, gambling, shark cage diving, Karoo Lamb (Cape Karoo Farms), flowers.
- Internet/websites (28,6%), word of mouth (14,4%), and return visit (10,9%) were the top 3 sources used by visitors to gather information about the region.

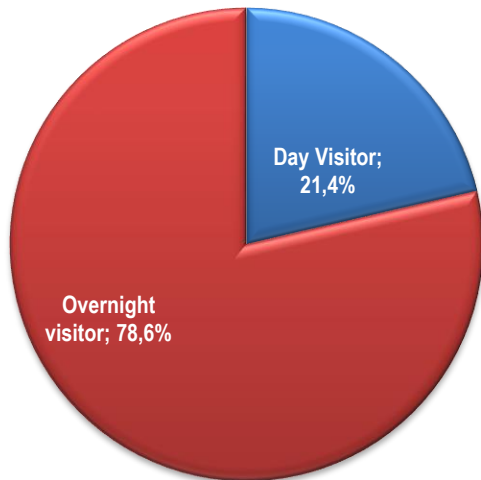
4.6 Top activities



4.7 Top information sources



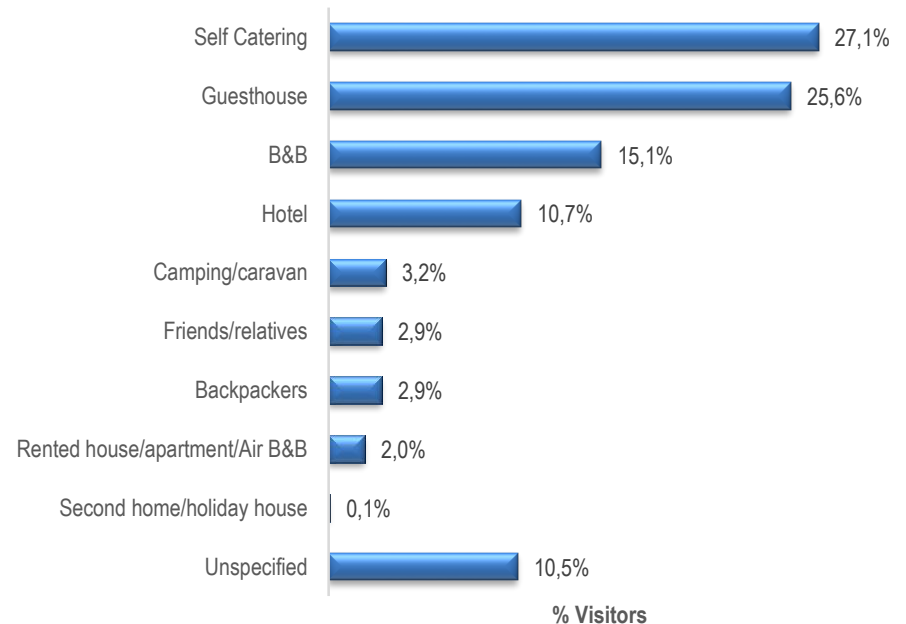
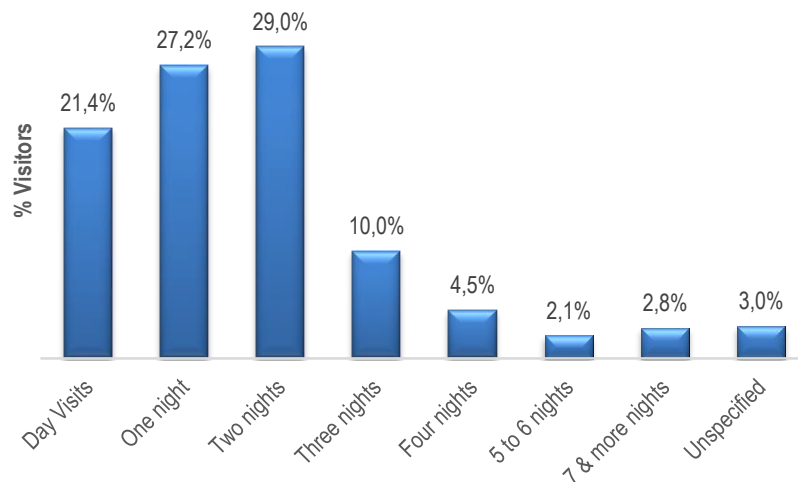
4.8 Overnight stay



- Overnight visitors (78,6%) made up the majority of travellers to the Cape Garden Route & Klein Karoo over the Jan – Dec 2019 period and 21,4% of respondents were day visitors.
- Majority of overnight visitors stayed for two nights (29,0%) and 27,2% of respondents indicated a stay of one night in the region.
- A large number of respondents indicated their preferred accommodation type as self-catering (27,1%), followed by guesthouse (25,6%), and B&B (15,1%).

4.10 Accommodation Usage

4.9 Average Length of Stay



5. Profile/Snapshot of overseas and domestic markets

OVERVIEW OF OVERSEAS & DOMESTIC VISITOR TRENDS AND PATTERNS, JAN – DEC 2019		
TOURISM INDICATOR	OVERSEAS	DOMESTIC
Age group	21-35 (22.8%)	21-35 (13.2%)
	36-50 (30.2%)	36-50 (20.6%)
	51-70 (15.6%)	51-70 (8.2%)
Main purpose of visit	Holiday/leisure (84.6%)	Holiday/leisure (64.2%)
	VFR (3.4%)	Sport (15.0%)
	Business (2.7%)	Events (11.8%)
Most common travel group size	Pairs (22.8%)	Pairs (13.2%)
	Groups of three (30.2%)	Groups of three (20.6%)
Most common length of stay	-	-
	-	-
Most common mode of transport	Rented car (69.2%)	Own Motor Vehicle (78.1%)
	Shuttle Service (8.1%)	Rented car (6.9%)
Top information sources	Internet (31.6%)	Internet (25.8%)
	Travel Agent (19.4%)	Word of mouth (20.8%)
Average daily spend	-	-
Type of accommodation	Guesthouse (30.5%)	Self-catering (33.8%)
	Self-catering (20.4%)	Guesthouse (20.7%)
Average spend on accommodation	-	-
Top three activities undertaken	Scenic drives (21.5%)	Scenic drives (22.9%)
	Outdoor Activities (20.6%)	Culture/heritage (11.1%)
	Culture/heritage (19.0%)	Outdoor Activities (9.1%)

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

6. Profile/Snapshot of top international markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL MARKET, JAN – DEC 2019				
TOURISM INDICATOR	Germany	United Kingdom	Netherlands	France
Main purpose of visit	Holiday/leisure (91.5%)	Holiday/leisure (84.7%)	Holiday/leisure (86.1 %)	Holiday/leisure (90.7%)
Most common travel group size	Pairs (20.9%)	Groups of 3 (31.5%)	Pairs (25.4%)	Pairs (20.5%)
	Groups of 3 (27.9%)	Groups of 4 (21.4%)	Groups of 3 (36.4%)	Groups of 3 (34.4%)
Most common age group	36 – 50 years (27.9%)	36 – 50 years (31.5%)	36 – 50 years (36.4%)	21 – 35 years (34.4%)
Most common length of stay	2 nights (49.7%)	2 nights (42.0%)	2 nights (45.6%)	2 nights (55.5%)
	1 night (23.8%)	1 night (26.6%)	1 night (24.2%)	1 night (23.5%)
Most common mode of transport	Rented car (67.5%)	Rented car (70.7%)	Rented car (67.9%)	Rented car (72.2%)
Top information sources	Internet (32.6%)	Internet (25.0%)	Internet (31.1%)	Internet (36.4%)
	Travel Agent (19.8%)	Travel Agent (23.6%)	Travel Agent (24.9%)	Travel Agent (13.9%)
Most common type of accommodation	Guesthouse (33.2%)	Guesthouse (31.6%)	Guesthouse (35.2%)	Guesthouse (31.1%)
Top three activities undertaken	Culture & Heritage (22.4%)	Scenic drives (20.7%)	Outdoor Activities (28.2%)	Culture & Heritage (31.8%)
	Scenic Drives (18.4%)	Culture & Heritage (20.5%)	Scenic Drives (27.8%)	Scenic Drives (26.5%)
	Outdoor Activities (15.6%)	Outdoor Activities (16.0%)	Beaches (19.6%)	Outdoor Activities (23.8%)

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

7. Profile/Snapshot of top domestic markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC MARKET, JAN – DEC 2019		
TOURISM INDICATOR	Western Cape	Eastern Cape
Main purpose of visit	Holiday/leisure (45.4%)	Holiday/leisure (31.0%)
	Events (20.1%)	Events (31.0%)
	Sport (18.5%)	Sport (30.8%)
Most common travel group size	-	-
	-	-
Most common age group	-	-
Most common length of stay	1 night (44.1%)	1 night (49.7%)
	2 nights (19.2%)	2 nights (17.6%)
Most common mode of transport	Own motor vehicle (73.0%)	Own motor vehicle (89.3%)
Top information sources	Word of mouth (33.5%)	Word of mouth (39.9%)
	Return Visit (21.9%)	Return Visit (24.4%)
Most common type of accommodation	Guesthouse (19.2%)	Self-catering (22.4%)
	Self-catering (16.3%)	Guesthouse (20.2%)
Top three activities undertaken	Scenic drives (21.5%)	Scenic drives (18.6%)
	Outdoor activities (6.9%)	Beaches (5.9%)
	Crafts/food markets (3.1%)	Outdoor activities (5.6%)

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

8. Cape Garden Route & Klein Karoo Towns

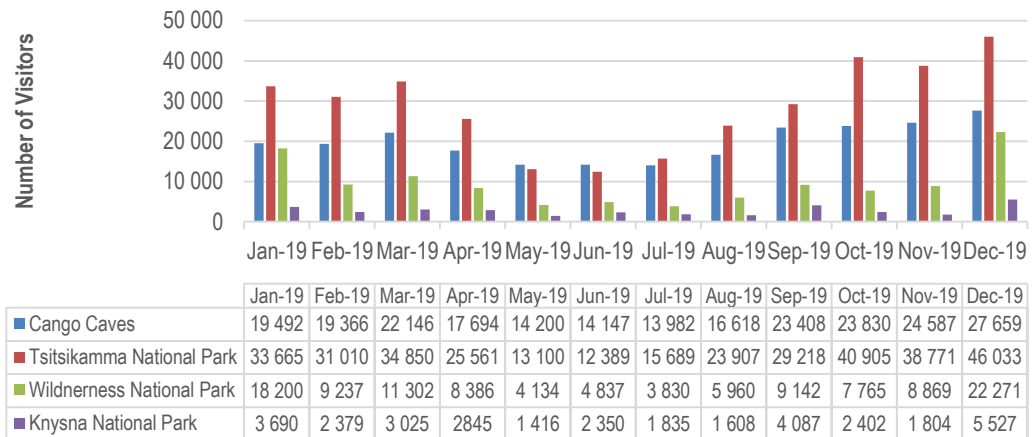
OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, JAN – DEC 2019						
TOURISM INDICATOR	Knysna	George	Uniondale	Oudsthoorn	Plettenberg Bay	Wilderness
% Share overseas	75.3%	49.3%	2.2%	45.6%	82.8%	75.7%
% Share domestic	24.7%	50.7%	97.8%	54.4%	17.2%	24.3%
Top international markets	Germany (28.2%)	Germany (39.1%)	France (32.0%)	Germany (39.6%)	Netherlands (9.9%)	Germany (44.8%)
	United Kingdom (14.8%)	United Kingdom (15.6%)	Germany (28.0%)	United Kingdom (25.6%)	United Kingdom (7.2%)	United Kingdom (20.9%)
	Netherlands (8.7%)	Netherlands (14.1%)	Italy (20.0%)	Netherlands (8.8%)	-	France (7.7%)
Top domestic markets	Western Cape (39.6%)	Western Cape (49.6%)	Western Cape (45.0%)	-	Gauteng (20.2%)	Western Cape (34.5%)
	Gauteng (28.6%)	Gauteng (9.2%)	Eastern Cape (29.3%)	-	Eastern Cape (17.9%)	Gauteng (11.9%)
Main purpose of visit	Holiday/leisure (80.8%)	Holiday/leisure (90.7%)	Holiday/leisure (32.0%)	Holiday/leisure (97.9%)	Holiday/leisure (54.7%)	Holiday/leisure (90.3%)
	Seasonal/migrant worker (8.4%)	Business (4.1%)	Sport (34.4%)	Business (1.8%)	VFR (12.7%)	VFR (3.3%)
Most common travel group size	Pairs (32.1%)	-	-	Pairs (26.0%)	Pairs (33.2%)	-
	Groups of 3 (41.9%)	-	-	Groups of 3 (49.0%)	Groups of 3 (30.1%)	-
Most common length of stay	2 nights (40.2%)	2 nights (40.8%)	1 night (59.0%)	2 nights (49.7%)	2 nights (31.2%)	2 nights (37.8%)
	3 nights (19.5%)	1 night (35.8%)	2 nights (14.6%)	1 night (41.4%)	3 nights (30.7%)	3 nights (21.4%)
Most common mode of transport	Rented car (56.8%)	Rented car (45.9%)	Own Motor Vehicle (87.9%)	Own Motor Vehicle (48.3%)	Rented car (51.6%)	Rented car (37.2%)
	Own Motor Vehicle (20.8%)	Own Motor Vehicle (32.3%)	Rented car (10.5%)	Rented car (42.4%)	Own Motor Vehicle (14.8%)	Own Motor Vehicle (10.3%)
Top information sources	Travel Agent (33.9%)	Internet (33.4%)	Word of mouth (38.4%)	Internet (48.0%)	Internet (29.1%)	Word of mouth (22.5%)
	Internet (27.9%)	Word of mouth (13.9%)	Return visit (29.4%)	Travel Agent (14.2%)	Books/magazines (33.4%)	Internet (12.6%)
Average daily spend	R501-R1000 (46.3%)	-	R201 – R500 (35.2%)	-	R201 – R500 (41.0%)	-
Type of accommodation	Self-catering (30.8%)	Guesthouse (27.8%)	Guesthouse (22.7%)	Self-catering (38.0%)	B&B (19.4%)	Guesthouse (27.3%)
	Guesthouse (23.5%)	Self-catering (25.3%)	Self-catering (17.2%)	Guesthouse (31.3%)	Guesthouse (16.2%)	Self-catering (22.3%)
Average spend on accommodation	R501-R1000 (37.9%)	-	R201 – R500 (28.7%)	-	R501 – R1000 (41.3%)	R1001 – R2000 (34.3%)
Top three activities undertaken	Scenic drives	Scenic drives	Scenic drives	Culture/heritage	Beaches	Outdoor Activities
	Outdoor activities	Culture/heritage	Outdoor activities	Scenic drives	Cuisine	Beaches
	Cruises	Outdoor activities	Sport	Adventure	Wine tasting	National Parks

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

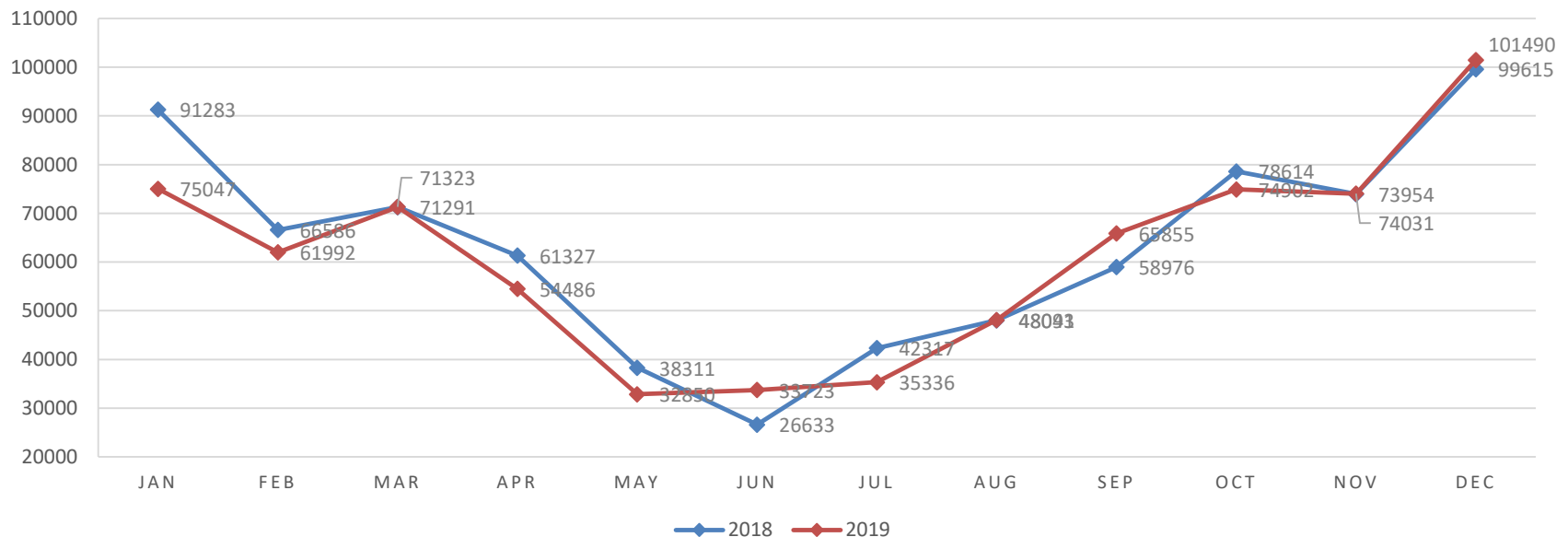
9. Cape Garden Route & Klein Karoo Attractions

- Cape Garden Route & Klein Karoo attractions (Cango Caves, and Tsitsikamma, Wilderness, and Knysna National Parks) received a total of 729 128 visitors over the period January to December 2019.
- Visitor numbers to these attractions show an overall decrease of 3,7% over the same period in 2018.
- Over the Jan – Dec 2019 period, December saw the highest recorded number of visitors (101 490 visitors) to the region followed by January with 75 047 visitors and October with 74 902 visitors.
- Tsitsikamma National Park was the most visited tourist attraction in the region with a total of 345 098 visitors over the period January to December 2019.
- Cango Caves was the most visited tourist attraction in May 2019 with 14 200 visitors as well as June 2019 with 14 147 visitors.
- Wilderness National Park and Knysna National Park received its highest total of visitors in December with 22 271 visitors and 5 527 visitors, respectively.

TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN - DEC 2019

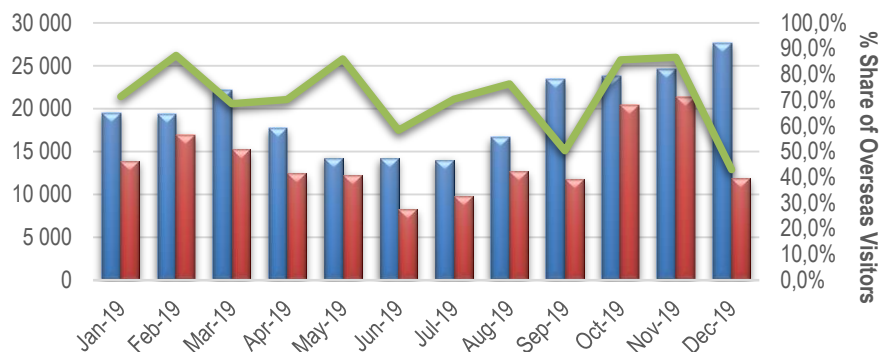


TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN-DEC 2019



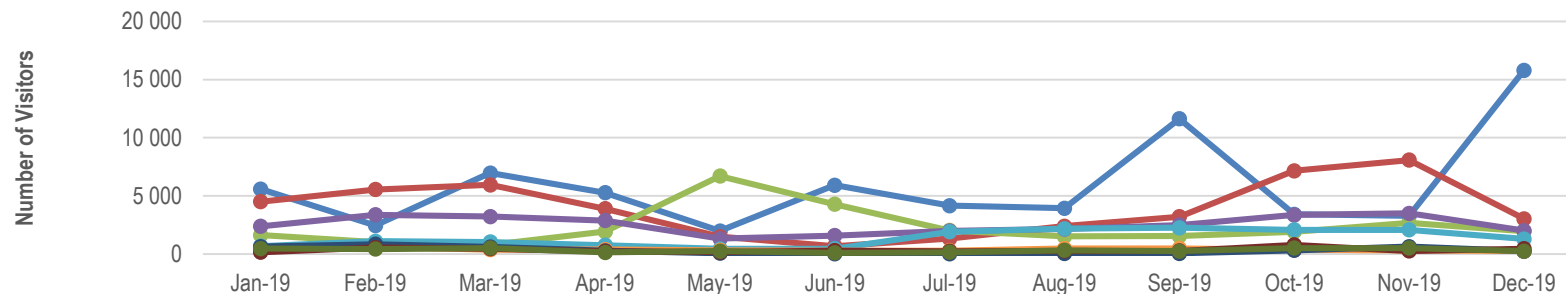
Source: SANParks 2019, Cango Caves 2019

TOTAL NUMBER OF VISITORS TO THE CANGO CAVES: JAN - DEC 2019



- The Cango Caves welcomed a total of 237 129 visitors over the period January to December 2019. The highest recorded number of visitors occurred in December with 27 659 patrons visiting the attraction.
- Overseas visitor numbers were the highest in November 2019 with 21 309 international patrons visiting the Cango Caves.
- South Africa, Germany, and United Kingdom were the top 3 source markets over the period January to December 2019.
- November 2019 saw the highest number of visitors from Germany with 8 080 German travellers visiting the attraction.
- May 2019 saw the highest number of visitors from India with 6700 Indian travellers visiting the attraction.
- South African visitor numbers were highest in December and September, which coincides with the festive season and school holidays.

CANGO CAVES VISITOR DISTRIBUTION BY TOP SOURCE MARKETS: JAN - DEC 2019



10. Acknowledgements

Acknowledgements and many thanks go to the following for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism offices in the Cape Garden Route & Klein Karoo:

- Calitzdorp Tourism
- George Tourism
- Knysna Tourism
- Ladismith Tourism
- Oudtshoorn Tourism
- Plettenberg Bay Tourism
- Wilderness Tourism

The participating attractions in the Cape Garden Route & Klein Karoo:

- Cango Caves
- South African National Parks
- Tsitsikamma National Park
- Wilderness National Park

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