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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 2020, a total of **1 474** 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:

George	391
Knysna	140
Oudtshoorn	455
Plettenberg Bay	320
Uniondale	168



### 3. Executive Summary

- In an effort to curb the spread of COVID-19, the South African national government announced a nationwide lockdown which took effect on 26 March 2020, resulting in a complete standstill of all tourism activity until 31 May 2020. In line with government's risk adjusted strategy, limited tourism activity was introduced in June and international borders re-opened in October. However, stricter lockdown restrictions were back over the festive season as a result of a second wave of COVID-19 infections.
- It should be noted that 90% of visitor surveys in this report were taken between January and March 2020 due regulations resulting in a lack of tourists over the remaining months because of COVID-19.
- Visitor surveys conducted in 2020 reflected a fair number of overseas (50,5%) and domestic (49,5%) visitors to the Cape Garden Route & Klein Karoo.
- The top international markets to the region were Germany (37,4%), United Kingdom (19,6%), and Netherlands (7,8%).
- The Western Cape ranked as the top province to the region with 38,2% of domestic travellers originating from within the province.
- Respondents indicated own motor vehicle (39,4%), and rented car (41,0%) as their preferred choice of transport to the region.
- The vast majority of respondents (77,4%) 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 23,7% of travellers. In addition visitors cited outdoor activities (20,4%) and beaches (17,1%) among the top activities undertaken in the Cape Garden Route & Klein Karoo.
- Day visitors accounted for 27,8% of travellers to the region and 72,2% of visitors stayed overnight.
- Overnight visitors spent an average of 1 night (25,3%), 2 nights (37,2%) or 3 nights (20,1%) in the Cape Garden Route & Klein Karoo.
- Self-catering (24,5%) and Guesthouse (24,3%) were the preferred accommodation types amongst respondents.
- Internet (32,8%) and visitor information centres (14,9%) were the two main sources used by visitors to obtain information about the region.

#### Cape Garden Route & Klein Karoo Visitor Trends 2020

%

share of overseas visitors	50.5%
share of domestic visitors	49.5%
share of overnight visitors	72.2%
share of day visitors	27.8%

**Top 3 international markets**

United Kingdom	(19.6%)
Germany	(37.4%)
Netherlands	(7.8%)

**Top 3 domestic markets**

Gauteng	(7.8%)
Western Cape	(38.2%)
Eastern Cape	(13.4%)

#### Main purpose of visit

Holiday/Leisure	77.4%
Business	9.9%
Education	3.7%

#### Length of stay

1 night	25.3%
2 nights	37.2%
3 nights	20.1%



Rented car	41%
Own vehicle	39.4%

#### Top information sources

Internet/Websites...	32.8%
Visitor Information..	14.9%

#### Average daily spend

R501 – R1000	(19.5%)
R1001 – R2000	(12.5%)



**Top 3 activities in the Cape Garden Route & Klein Karoo**



**Top accommodation**

Self Catering	24.5%
Guesthouse	24.3%



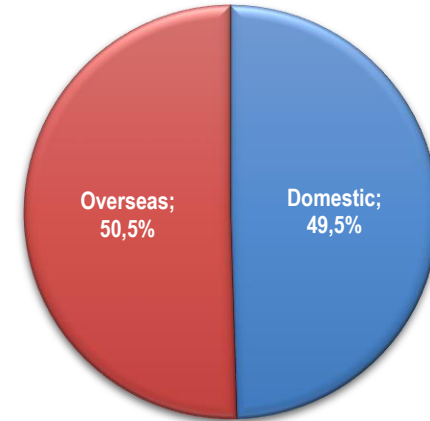
Scenic drives	(23.7%)
Outdoor activities	(20.4%)
Beaches	(17.1%)

## 4. Cape Garden Route & Klein Karoo Trends & Patterns

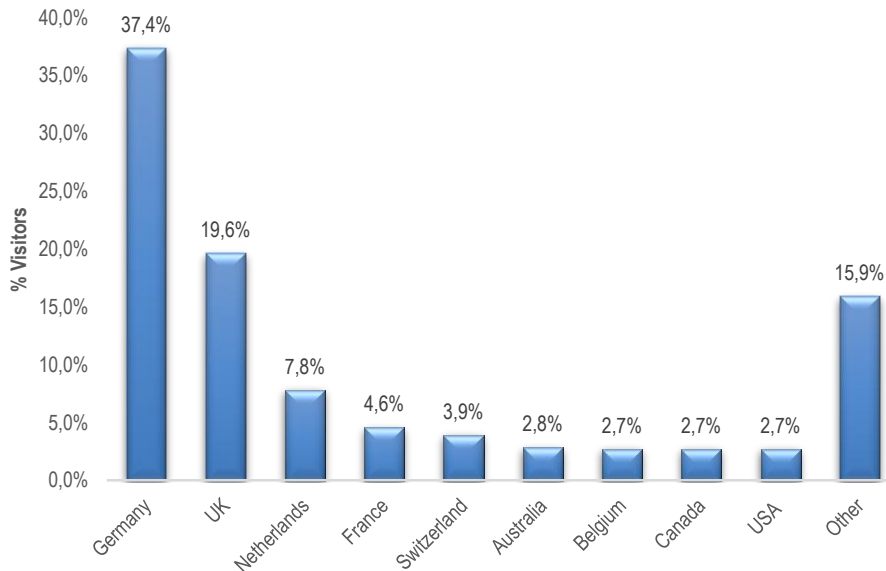
### 4.1. Origin of Visitors

- Overseas visitors made up 50,5% of travellers to the Cape Garden Route & Klein Karoo in 2020 which follows the general trend in the region. Over 90% of visitor surveys were taken during the first quarter of 2020. No visitor surveys were done during quarter two and three and all visitors who were surveyed in quarter four were from the domestic market.
- Traditional markets such as Germany and the United Kingdom ranked as the region's top two international countries.
- European travellers continue to drive tourism activity in the Cape Garden Route & Klein Karoo with the top five international source markets originating from the continent.
- Australia, Canada and the United States were also among the top international source markets for this region.
- Nearly two fifths of domestic visitors came from within the Western Cape, 13,4% were from the Eastern Cape and 7,8% from Gauteng. 18,4% of respondents who indicated to be from South Africa did not specify the province where they originated from.

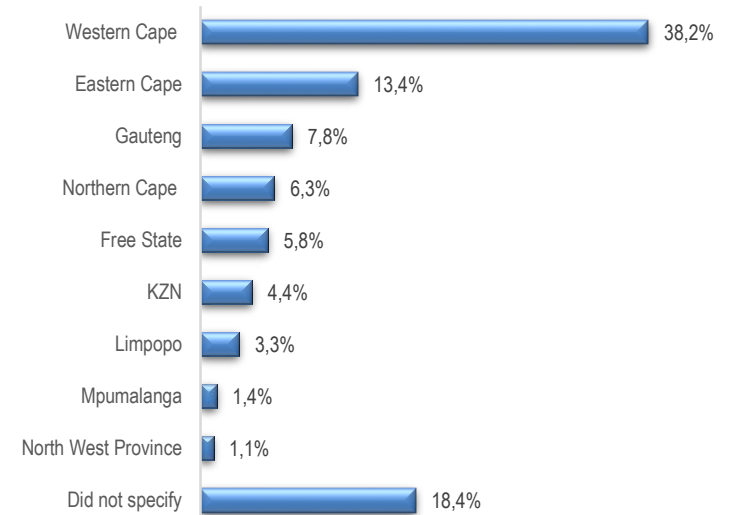
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2020



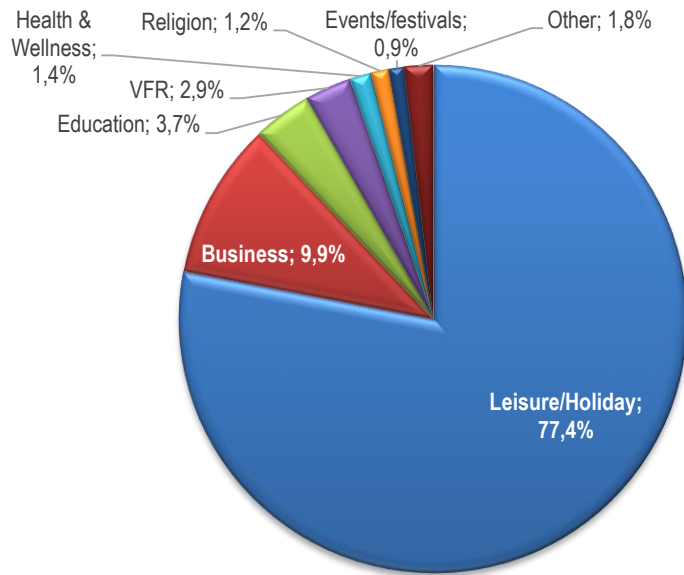
TOP INTERNATIONAL VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2020



% SHARE OF DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2020

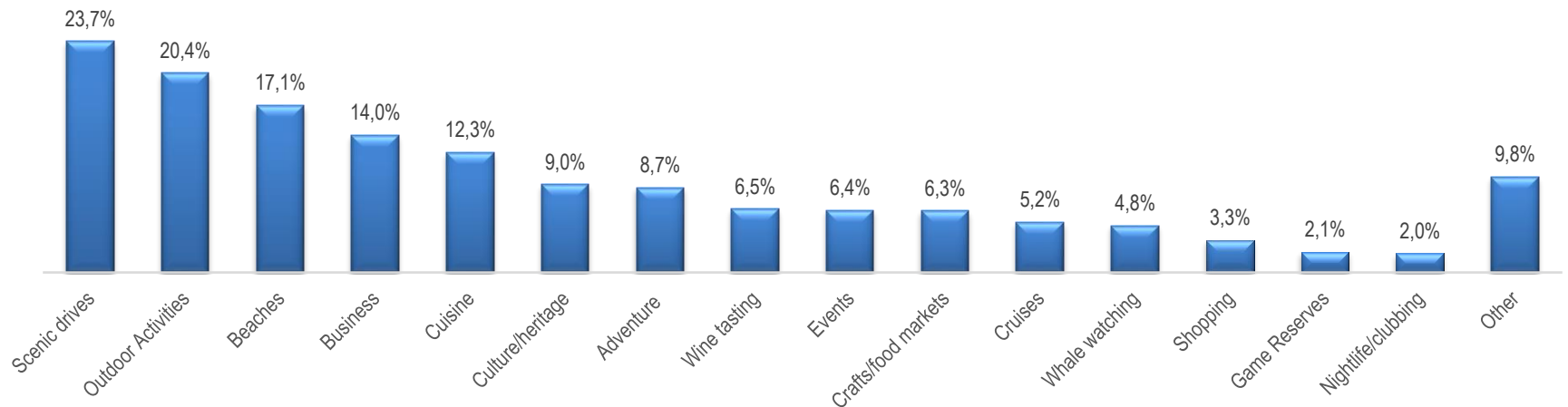


## 4.2 Main Purpose of Visit



- The top motivating factor for travel to the Cape Garden Route & Klein Karoo was for the purpose of holiday/leisure (77,4%).
- Travel for business (9,9%), and education (3,7%) ranked as part of the top three reasons for visiting the Cape Garden Route & Klein Karoo.
- Scenic drives (23,7%), outdoor activities (20,4%) and beaches (17,1%) were the top three activities undertaken in the region.
- Activities under the 'other' category included expos/exhibitions, health & wellness, national parks, Astro Tourism, birding, golf, flowers, fishing, cycling, Karoo Lamb (Cape Karoo Farms), sporting events-participator and shark cage diving.

## 4.3 Top Activities

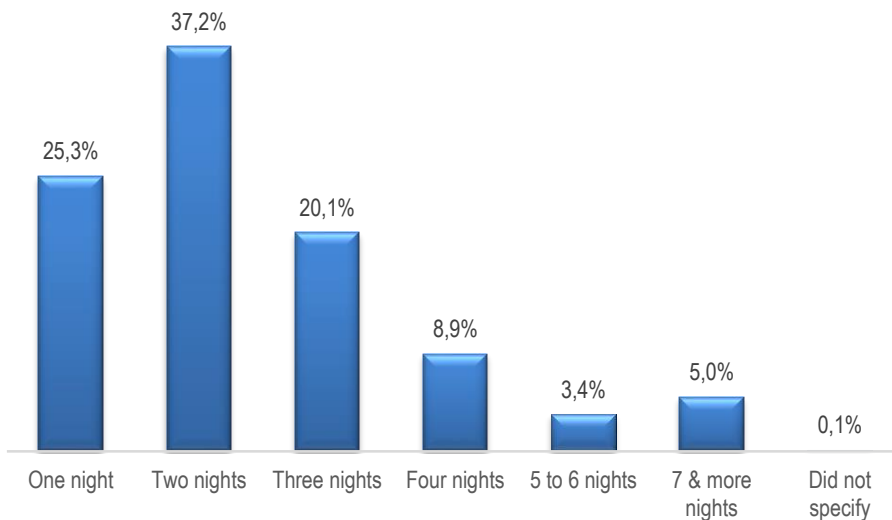




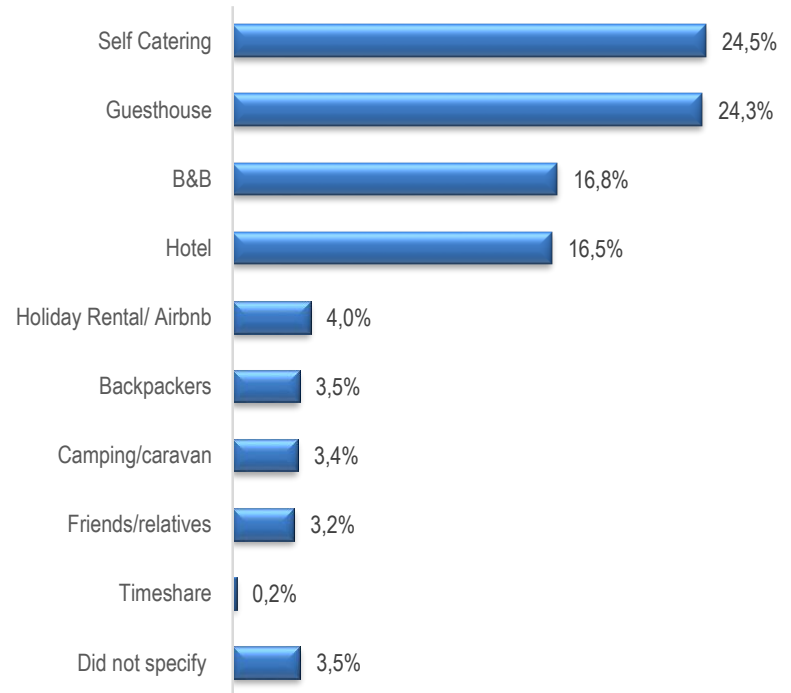
#### 4.4 Overnight Stay



#### 4.5 Average Length of Stay

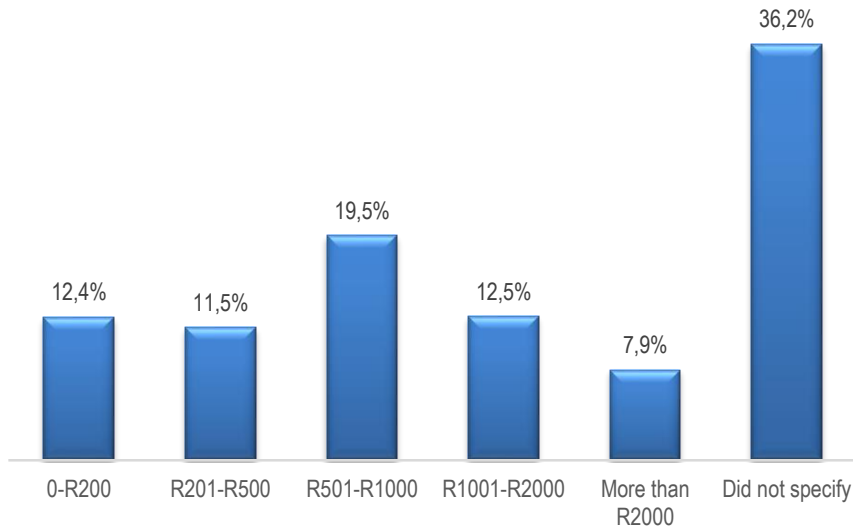


#### 4.6 Accommodation Usage



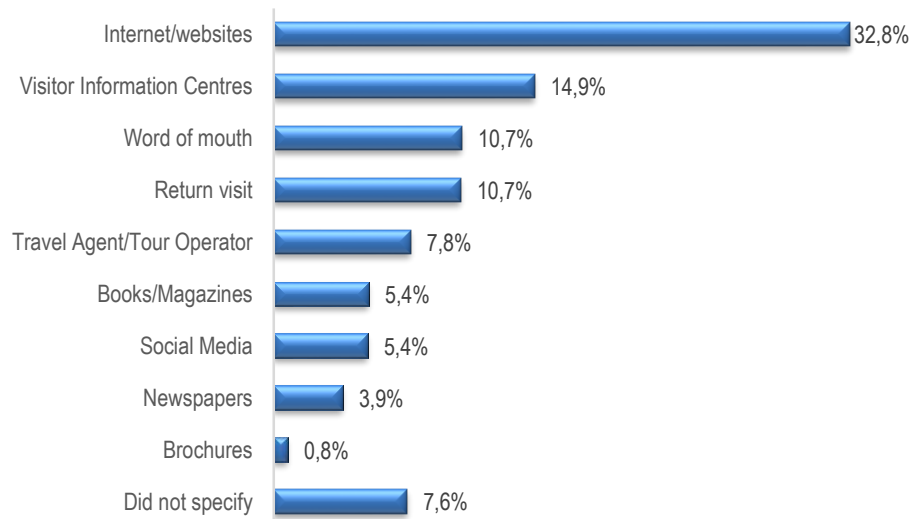
- Overnight visitors (72,2%) made up the majority of travellers to the Cape Garden Route & Klein Karoo over the Jan – Dec 2020 period and 27,8% of respondents were day visitors.
- Majority of overnight visitors stayed for two nights (37,2%) and 25,3% of respondents indicated a stay of one night in the region.
- A quarter of respondents indicated their preferred accommodation type as self-catering, followed by guesthouse (24,3%), and B&B (16,8%).

## 4.7 Average Daily Spend

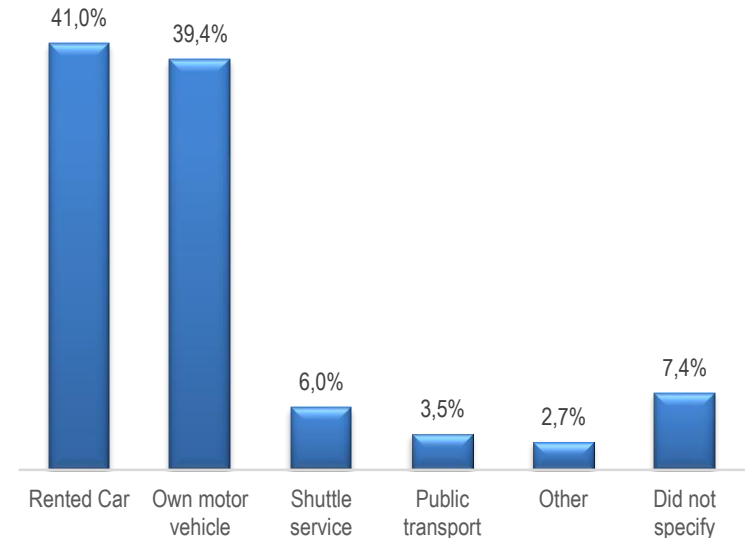


- Around 20% of respondents spent between R501 and R1000 daily and 12,5% spent between R1001 and R2000 in the region.
- Internet (32,8%) and Visitor Information Centres (14,9%) were the most popular tools used to obtain information about the region. In addition, word of mouth (10,7%) and return visits (10,7%) were among the top information sources.
- Four fifths of respondents travelled to the region via rented cars (41%) or own motor vehicles (39,4%). A small minority travelled via shuttle service (6%), and public transport (3,5%). 'Other' modes of transport included long distance bus, mini bus taxi, tour bus, and motorbike.

## 4.8 Top Information Sources



## 4.9 Mode of Transport

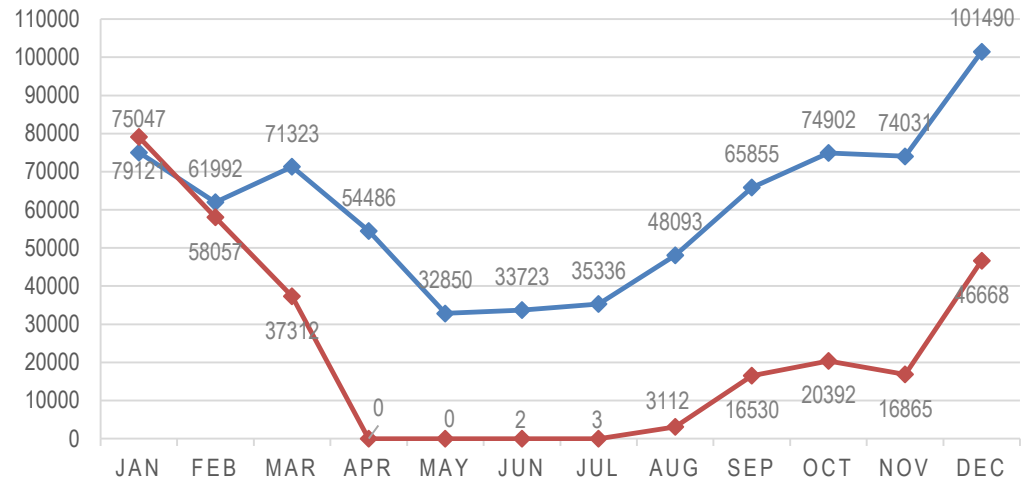




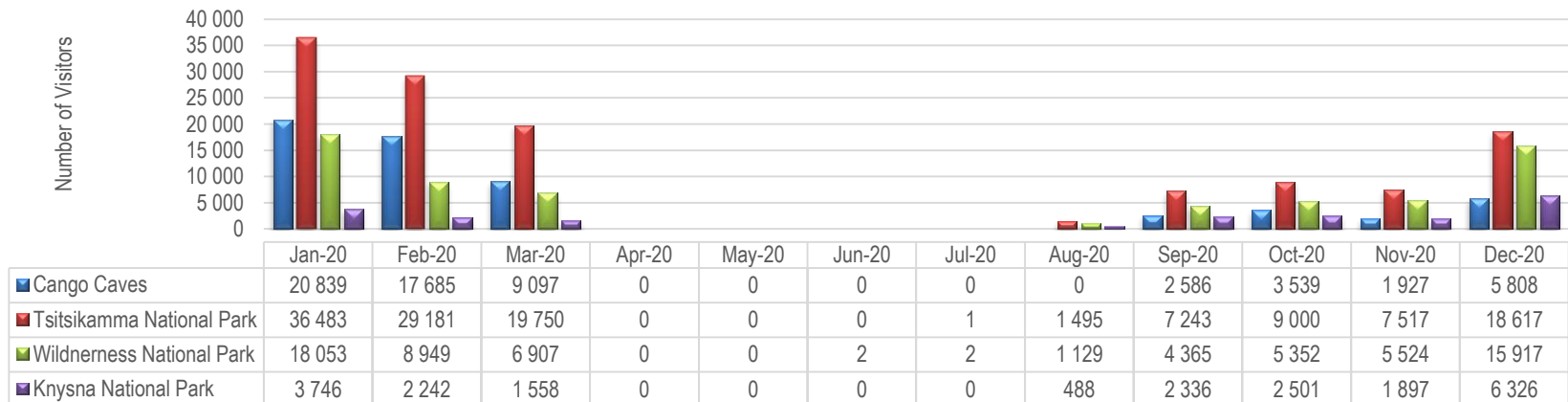
## 6. Cape Garden Route & Klein Karoo Attractions

- The participating Cape Garden Route & Klein Karoo attractions received a total of 278 062 visitors over the period January to December 2020.
- Visitor numbers to these attractions show an overall decrease of 61,9% over the same period in 2019.
- Visitor numbers were on an upward trend in January (+5,4%), slowly decreasing in February (-6,3%) and finally plummeted in March (-47,7%) due to COVID-19 restrictions.
- All attractions in the region were closed throughout quarter two and most of quarter three of 2020 due to the nationwide lockdown, which took effect on 26 March 2020.
- Recovery was slow over the remaining months reaching 46 668 visitors in December 2020, a 54% decline from the previous year.

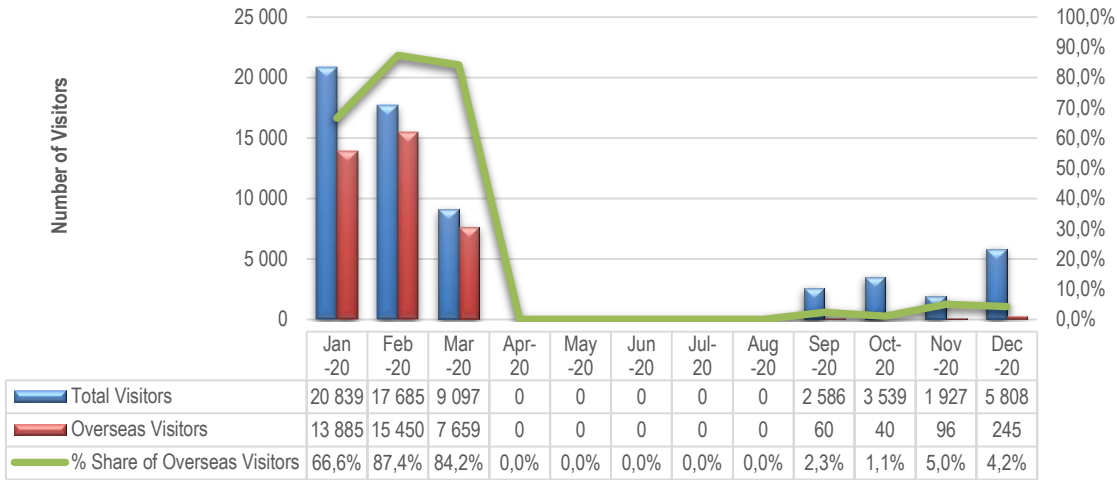
TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN-DEC 2020



TOTAL NUMBER OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO ATTRACTIONS, JAN - DEC 2020

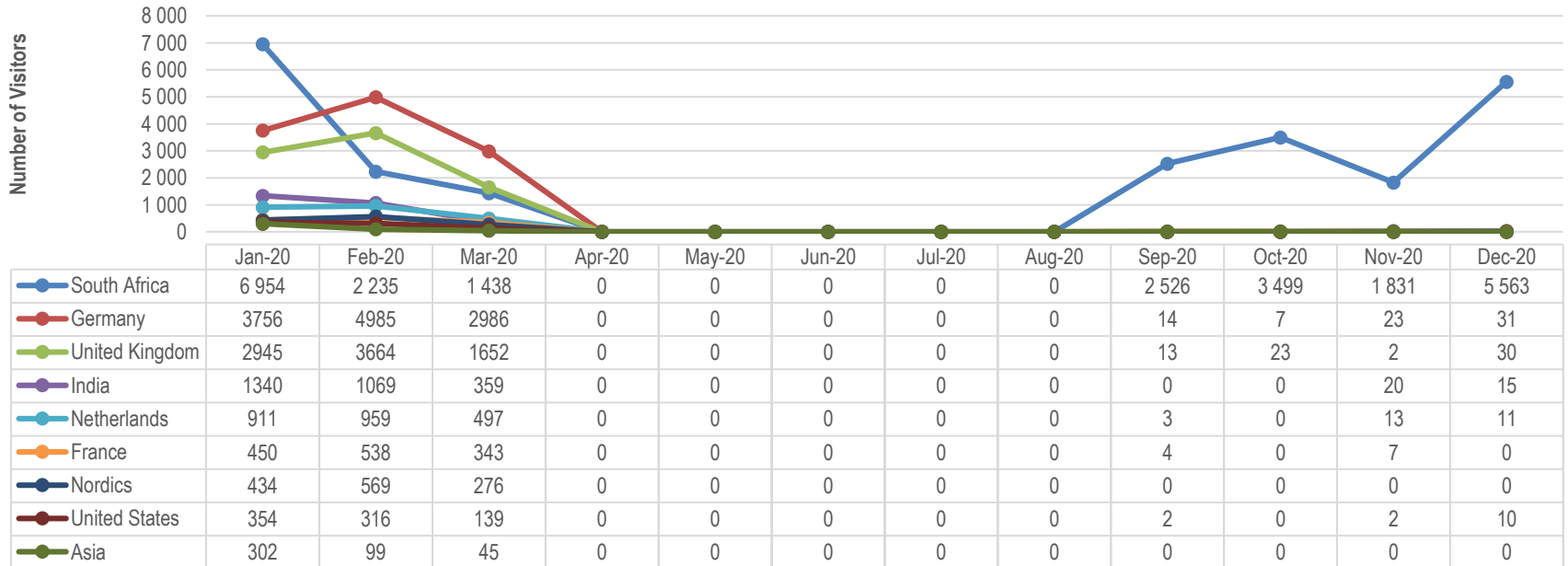


### TOTAL NUMBER OF VISITORS TO THE CANGO CAVES: JAN - DEC 2020



- The Cango Caves welcomed a total of 61 481 visitors in 2020. The highest recorded number of visitors occurred in January with 20 839 patrons visiting the attraction.
- Overseas visitor numbers were the highest in February 2020 with 15 450 international patrons visiting the Cango Caves.
- South Africa, Germany, and UK were the top 3 source markets over the period January to December 2020.
- The Cango Caves was closed from April to August 2020 due to lockdown restrictions to curb the spread of COVID-19. Recovery was slow over the third and fourth quarters with mostly domestic visitors as international travel only re-opened in October 2020.

### CANGO CAVES VISITOR DISTRIBUTION BY TOP SOURCE MARKETS: JAN - DEC 2020



## 7. 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
- Uniondale Tourism

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

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

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