



Summer Season Performance

2022/2023

Key Findings: Summer Season Survey Results

- Feedback obtained from the *2022 Summer Season Survey* confirmed that the Western Cape's tourism peak season kicked off strongly with significant growth in revenue, visitor numbers and bookings achieved when compared to 2021.
- From a sample of 78 tourism businesses, 54% represented the accommodation sector and 13% were from the attraction sector and a further 13% from the restaurant sector.
- In comparison to December 2021, tourism businesses confirmed a much better overall performance, with nearly 70% of businesses surveyed indicating that they have achieved their desired seasonal revenue and visitor numbers.
- The top 5 international markets booked during December 2022 were the UK, Germany, the USA, the Netherlands and France. Top domestic bookings were received from the Western Cape, Gauteng, Eastern Cape and KwaZulu-Natal provinces.
- International visitors mostly stayed between 2 and 3 nights while the domestic visitors predominantly stayed for 2 nights, followed by 7+ nights. An equally large proportion of international (23%) and domestic (18%) visitors were day trippers in the province.
- A combined 65% of tourism businesses confirmed that their revenue had increased when compared to December 2021, with 26% alone indicating that their revenue increased significantly. Close to 90% of businesses were fully booked during December 2022 and nearly 60% of businesses have already reached 30% to 49% forward bookings up to March 2023.
- Online booking channels and direct bookings with the accommodation establishments were the most common methods used for bookings. Facebook and Instagram ranked as the top two social media platforms which attracted the most interest from visitors.

Key Findings: Cape Whale Coast Summer Season Performance

- The Cape Whale Coast's tourism sector is recovering extremely well with December 2022 alone pointing to a successful and booming summer season.
- The region hosted 348 events in December 2022, a 59% increase against the 219 events held in December 2021. There were two festivals: Hermanus International Food & Wine Festival with about 2,000 tickets sold and the Stanford Village Festival that was free.
- 4,543 walk-ins to the four tourism Visitor Information Centres (VICs) were recorded, a record number for the past three years.
- 1,700 people visited the Danger Point Lighthouse during the 11 days it opened in December. Visitors came from all corners of South Africa, France, India, Canada, Namibia, Switzerland, Scotland, Australia and Germany.
- There were 2,017 visitors to Kogelberg Nature Reserve during the month of December 2022, a 57% increase year-on-year. Source markets to the reserve were mostly the Northern Cape and Gauteng, with a significant number of new visitors. Harold Porter Nature Reserve welcomed 7,150 visitors, a 12% increase against December 2021.
- 36 teams registered for the Hot Summer of Touch on Kleinmond Main Beach on 18 December, with eight players per team, reaching 288 participants on the day. Approximately 600 tickets were sold for each of the three live music shows held at Stanford Hills. The GoodLuck performance was completely sold out.
- A New Year's eve wedding in Hemel-en-Aarde recorded 290 guests staying overnight in Hermanus.
- Western Cape Traffic count measured a high of 15,160 vehicles at the Kleinmond turn-off on R43 arriving to the Overstrand on the 15th December. This was followed by 13,427 arriving on Monday 26th December. Traffic count was lowest on Sunday 25th December with 10,035 vehicles arriving.

Summer Season Performance Review

Survey Results: 2022/2023

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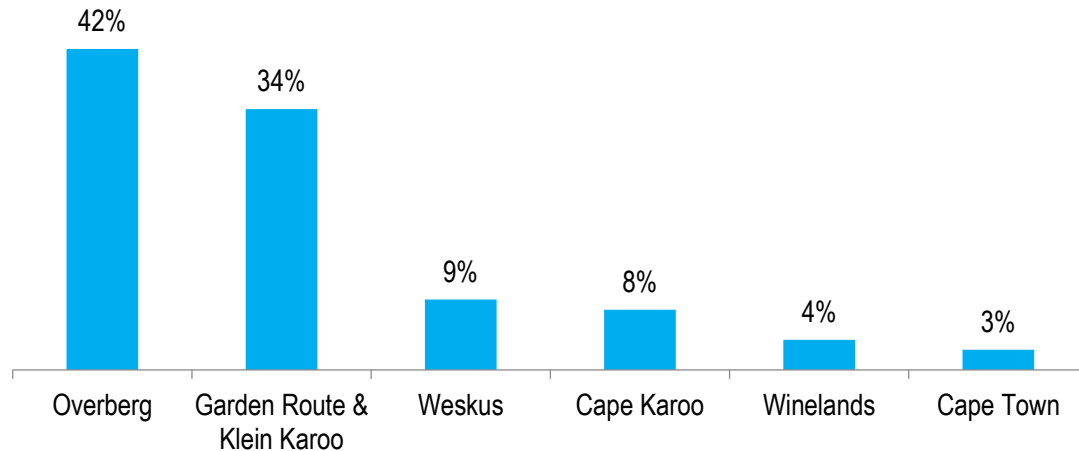
cape town & western cape
tourism, trade, investment, film

An Inspiring Place To Do Business

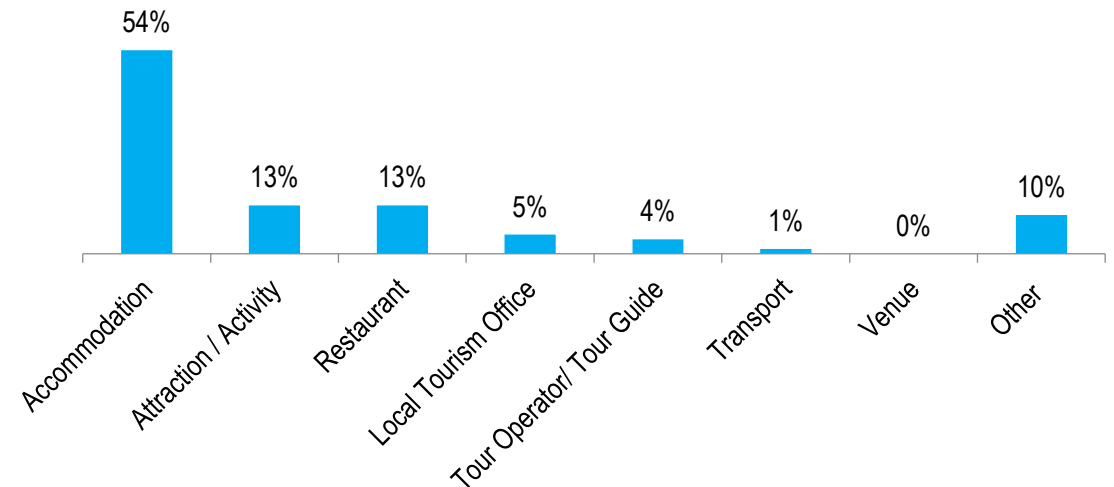
Methodology and Sample Size

- The objective of the Summer Season Survey was to determine the Western Cape's tourism performance and recovery over the peak season.
- An electronic survey link was circulated amongst tourism businesses across the six regions of the Western Cape and a total of **78 responses** were received.
- Survey Monkey was used as the primary tool to gather findings.
- Over 40% of respondents were based within the Overberg region and 34% in the Garden Route & Klein Karoo.
- 54% of respondents represented the accommodation sector, followed by 13% from the attraction and restaurant sectors respectively.

Sample of respondents by region



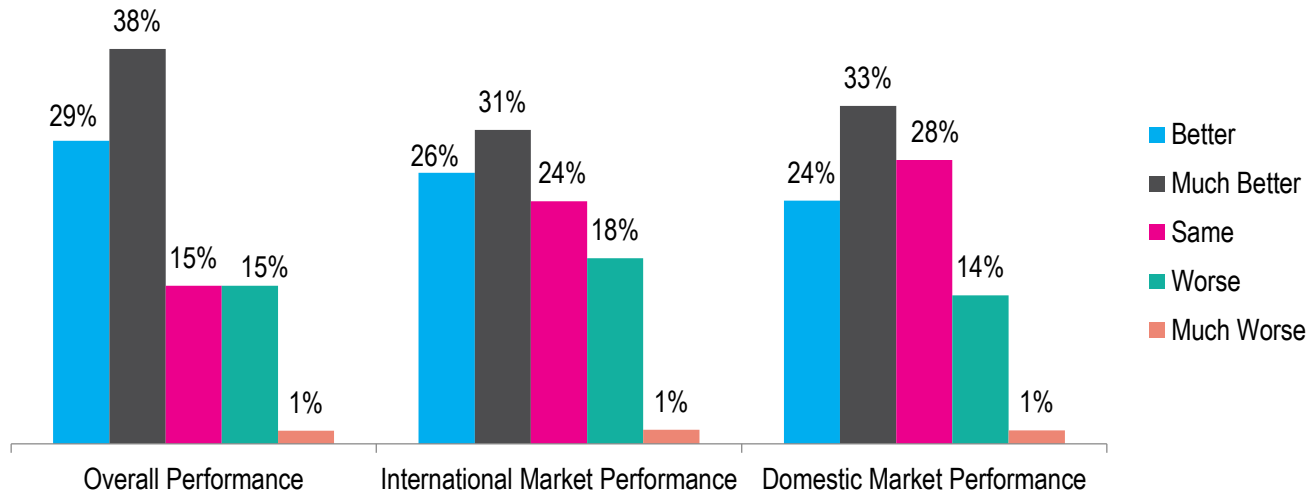
Sample of respondents by business type



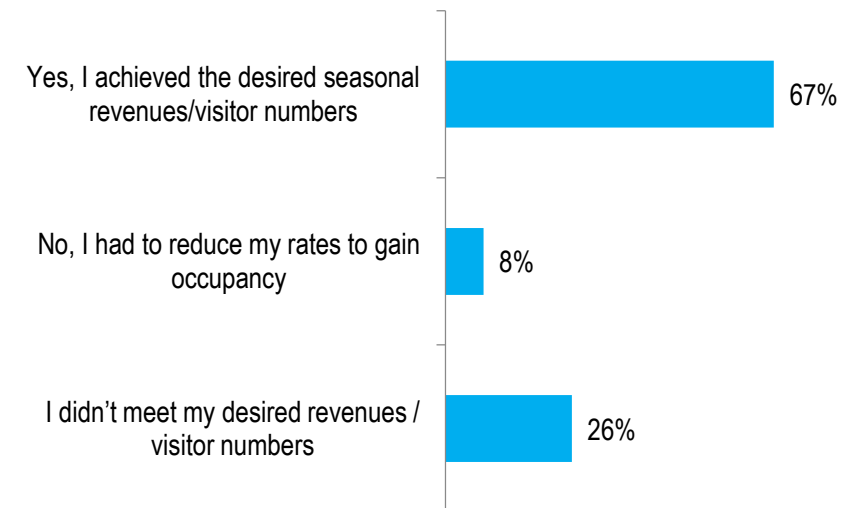
Industry Feedback Points to a Successful Summer Season

- Tourism businesses confirmed a much better overall performance and an equally stronger performance from both the international and domestic markets.
- Close to 70% of businesses indicated that they have achieved their desired seasonal revenue and visitor numbers, while 8% had to reduce their rates to gain occupancy and 26% did not meet their desired revenue and visitor numbers for the season.

**Overall business performance
Dec 2022 vs. Dec 2021**



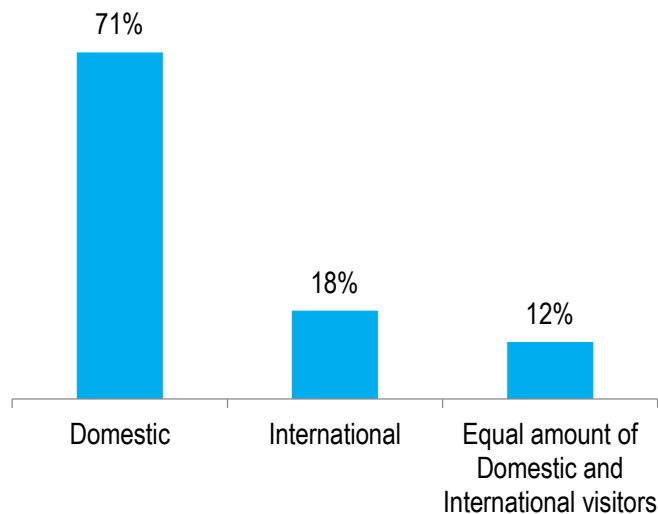
**2022 Summer Season anticipated
revenues/visitor numbers vs. 2021**



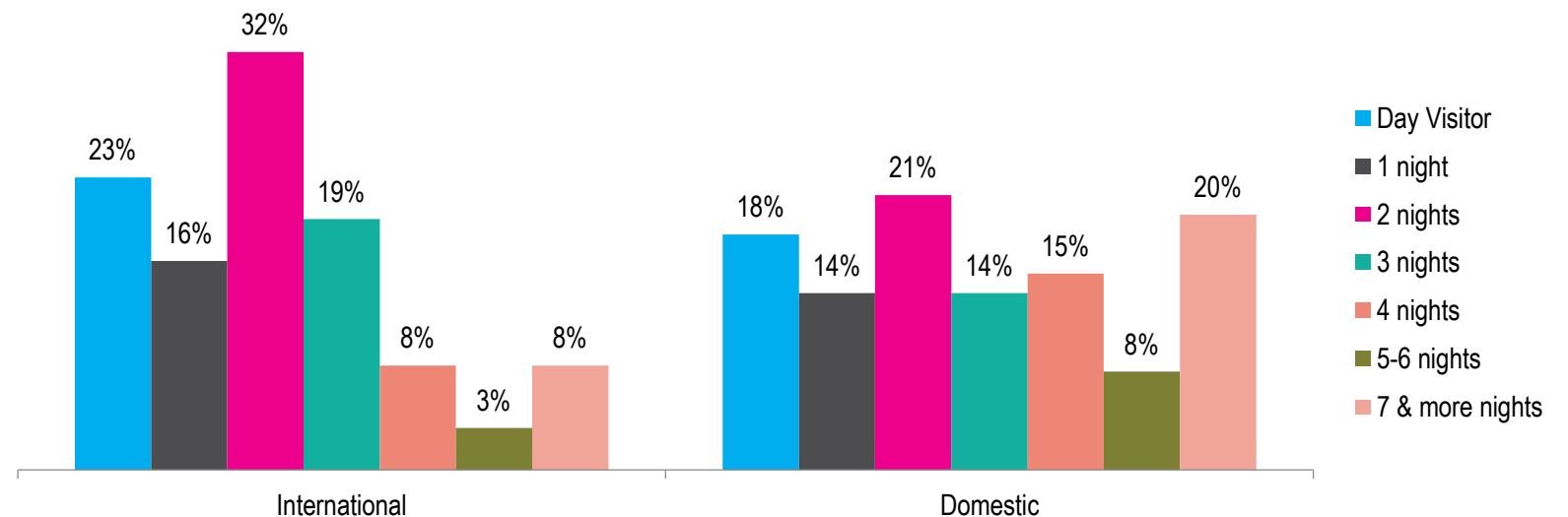
Domestic Market Sustains Tourism and Europe Regains Momentum

- The top 5 international markets booked during December 2022 were UK, Germany, USA, Netherlands and France. Tourism businesses indicated that a significant number of visitors were also seen from Australia.
- Top domestic bookings were received from the Western Cape, Gauteng, Eastern Cape and KwaZulu-Natal provinces.
- International visitors mostly stayed between 2 and 3 nights while the domestic visitors predominantly stayed for 2 nights or up to 7 nights and more.
- An equally large proportion of international (23%) and domestic (18%) visitors were day trippers in the province.

Origin of Visitors



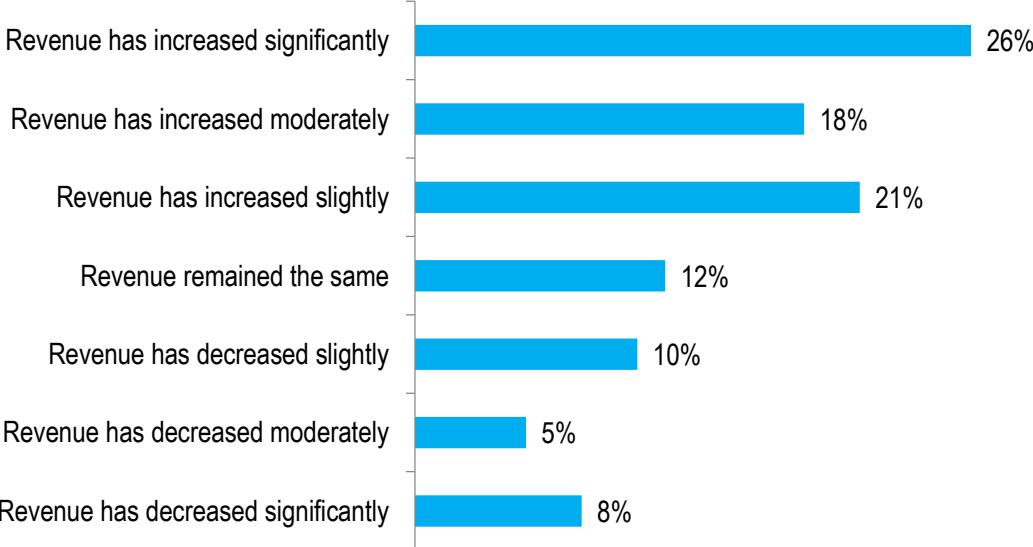
Domestic and international visitors' average length of stay during Dec 2022



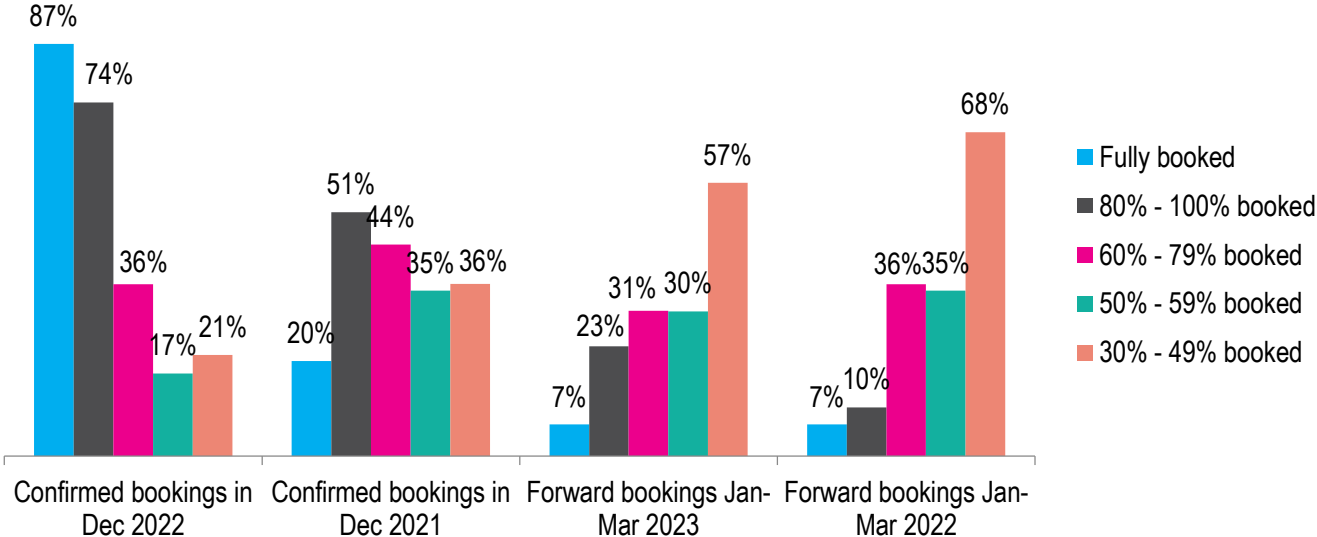
Remarkable Growth in Revenue and Bookings Achieved in Dec 2022

- A combined 65% of tourism businesses confirmed that their revenue has increased when compared to December 2021, with 26% alone indicating that their revenue increased significantly.
- Close to 90% of businesses were fully booked during December 2022 and nearly 60% of businesses have already reached 30% to 49% forward bookings up to March 2023.

Revenue in Dec 2022 vs. Dec2021



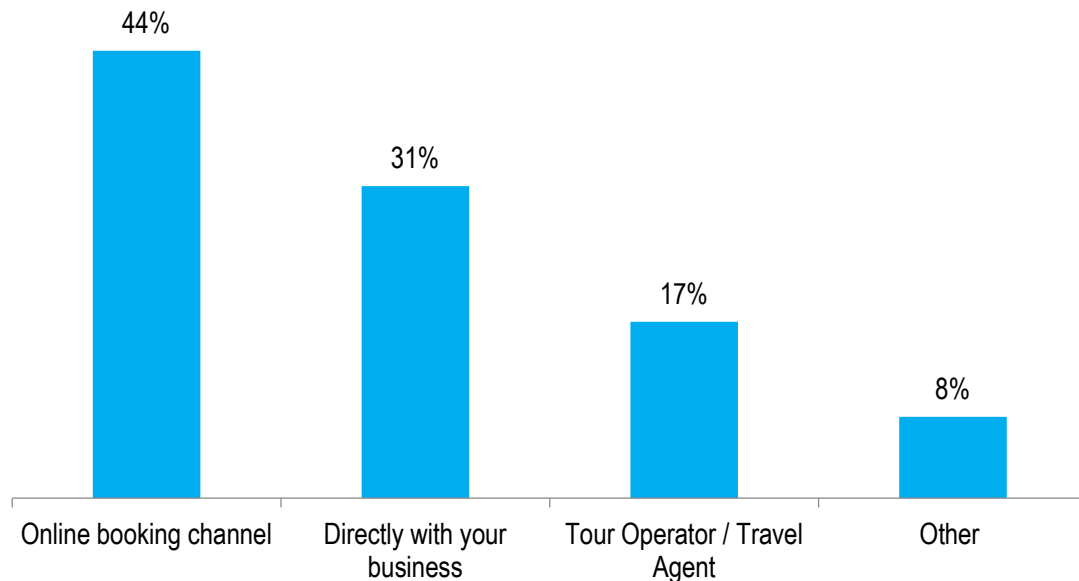
The overall status of confirmed and forward bookings



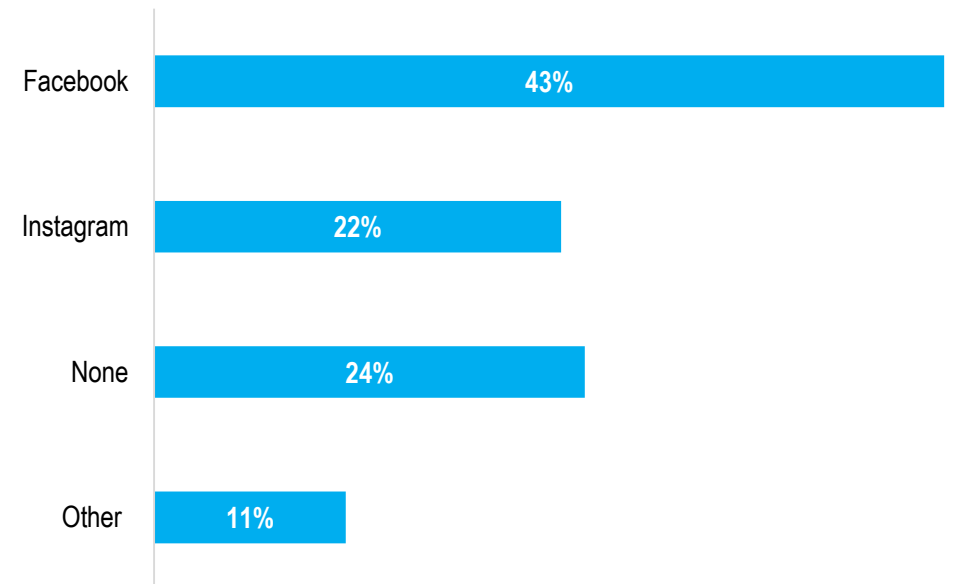
Summer Season Bookings Driven by Online and Direct Channels

- Online booking channels and direct bookings with the establishments were the most common methods used for bookings.
- Facebook and Instagram ranked as the top two social media platforms which attracted the most interest from visitors.

Booking channels visitors mostly used to make bookings for the summer season



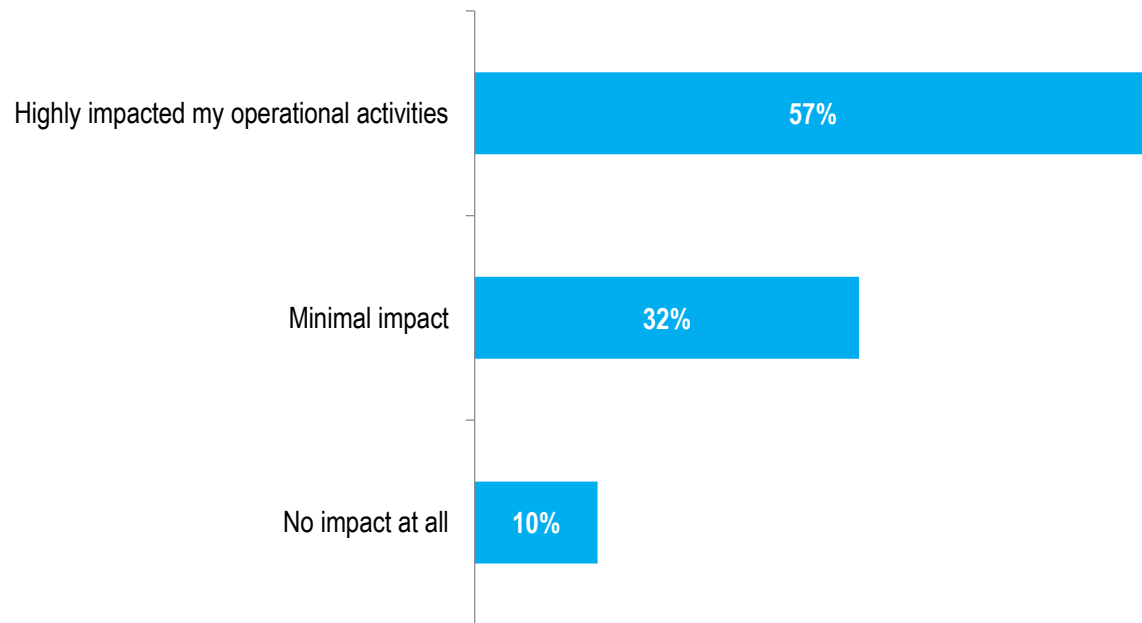
Social media platforms which attracted the most interest to tourism businesses



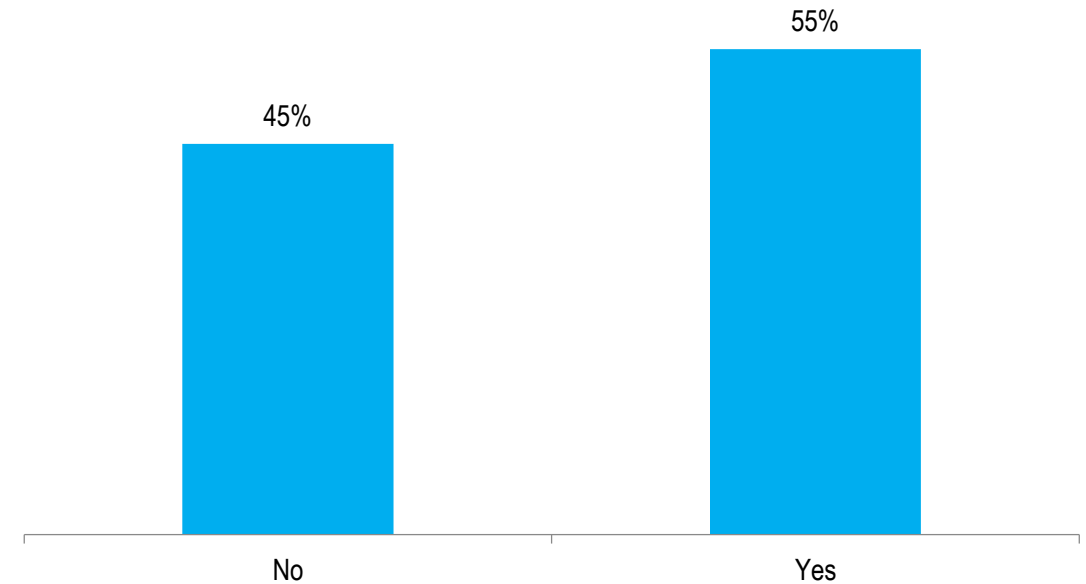
Impact of Loadshedding on Tourism Industry Greater than Anticipated

- Close to 60% of respondents indicated that load shedding has highly impacted their daily operational activities.
- 55% of international visitors were aware of South Africa's load shedding prior to booking their trip and 45% were not.
- The potential impact of loadshedding on the tourism sector also ranked as the top concern amongst tourism businesses.

Impact of load shedding on daily operational activities



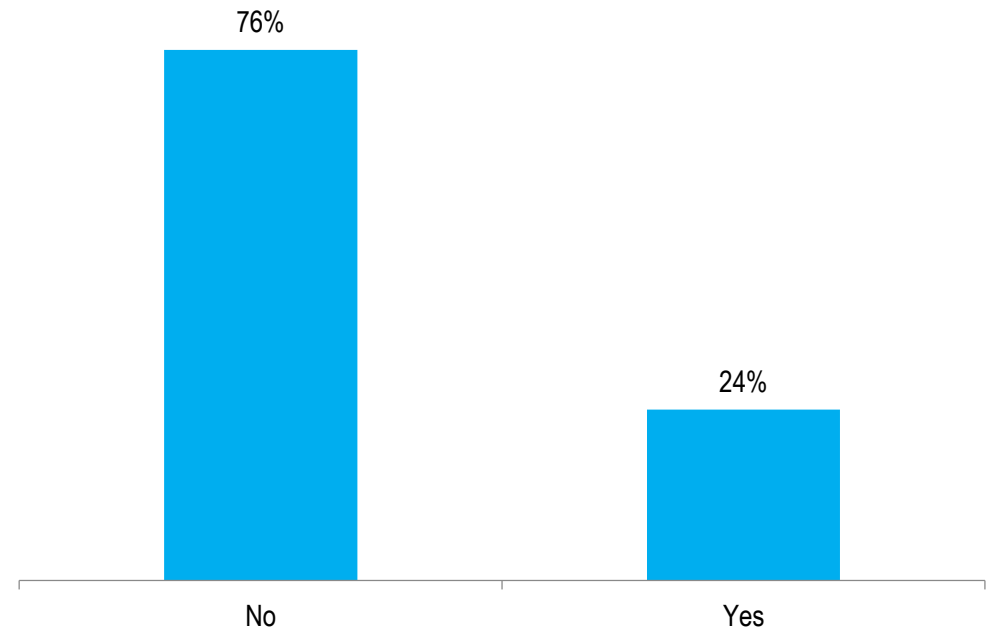
% international visitors who were aware of load shedding prior to booking their trip to South Africa



Awareness of Safety Concerns in the Western Cape

- Close to 80% of tourism businesses were not made aware of any safety incidents from their guests and 24% were informed of incidents.
- Following below was the most frequent safety incidents obtained from guests:
 - Theft of personal belongings
 - Opportunistic crime; particularly during load shedding periods
 - Credit Card scams
 - Hikers attacked or hijacked
 - Break-in to vehicles and burglaries

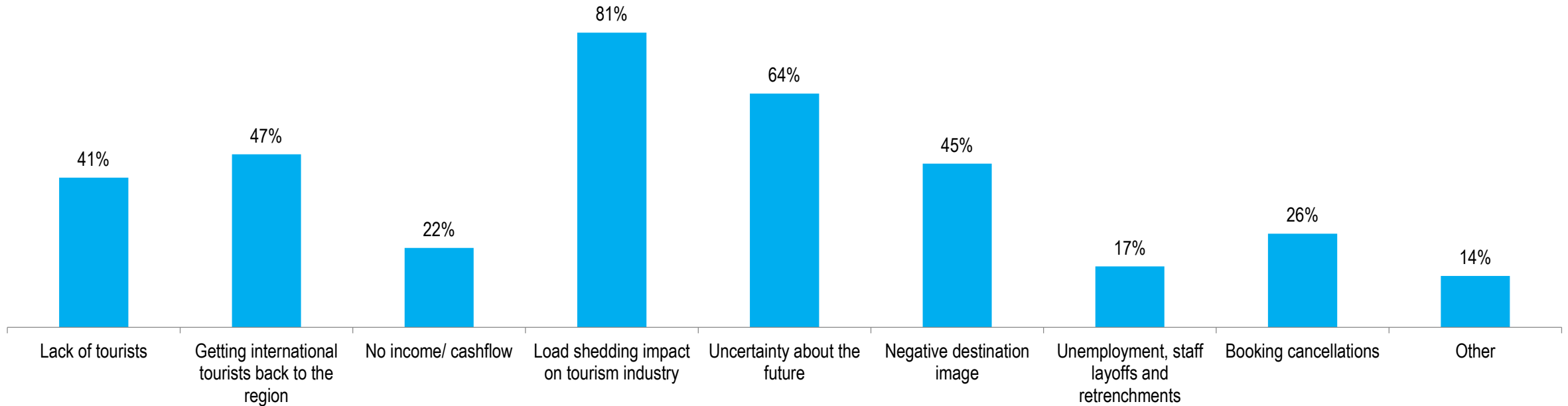
% Share of businesses that were made aware of safety incidents from their guests

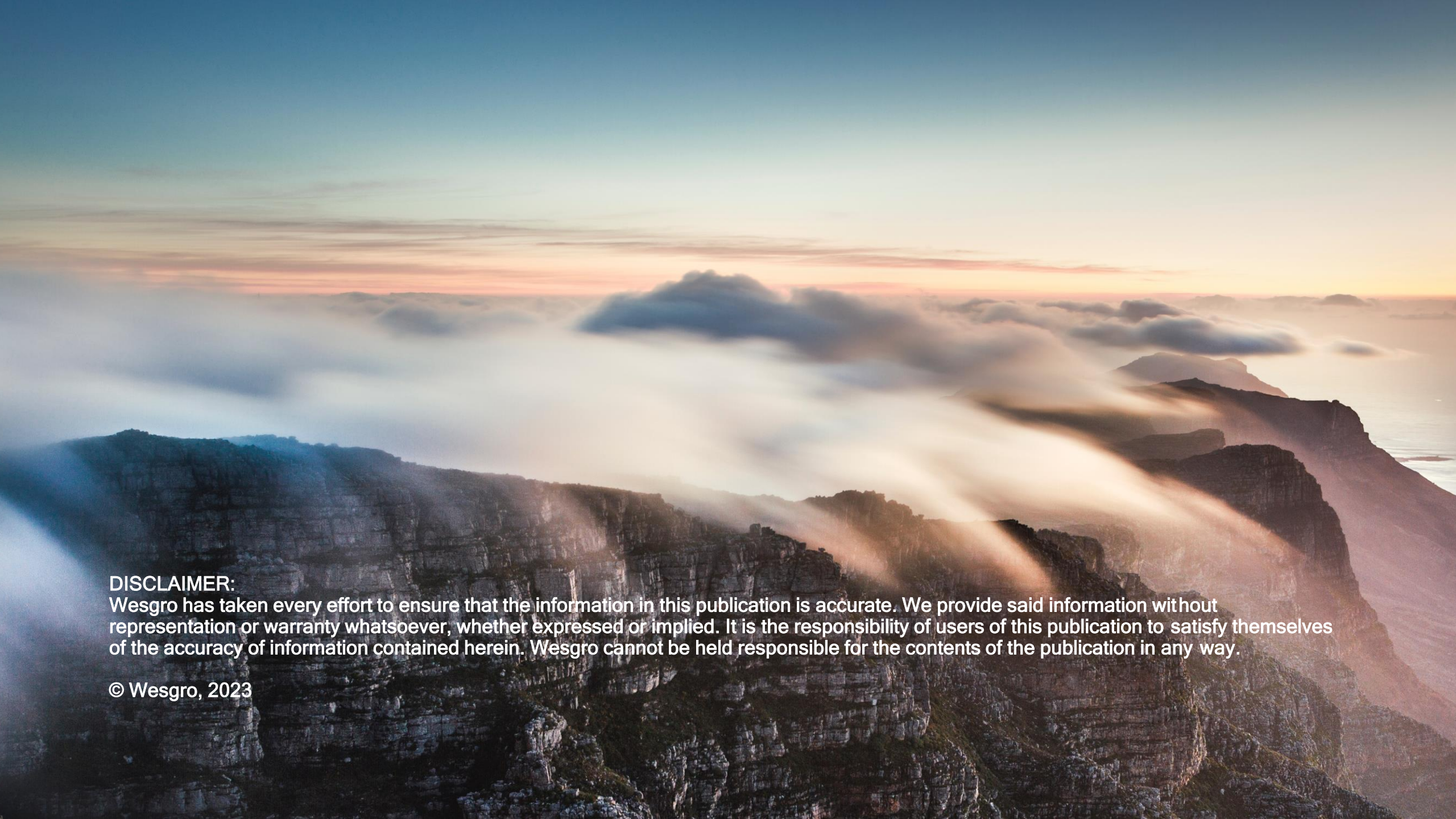


Top Concerns Amongst Tourism Businesses

- 81% of tourism businesses expressed their concerns around the potential impact of load shedding on the tourism industry and 64% still has a lot of uncertainty about the future.
- Around 47% of businesses remains concerned about attracting international tourists back to the Western Cape and 45% indicated that the negative image of the destination continues to be a travel barrier and concern.

Top five concerns amongst tourism businesses





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