



Western Cape Regional Trends

January — December 2022

WESGRO

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

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1. Executive Summary

- Between January and December 2022, the largest proportion of travellers (81.5%) to the Western Cape were from the domestic market, and of these, 79% were from the Western Cape itself. This confirmed that locals travelled mainly within their own province. Some came from Gauteng (8.0%).
- The overseas market accounted for 18.5% of visitors to the province during this period, with the greatest numbers coming from Germany (23.8%), UK (21.3%) and France (7.9%).
- Visitors to the Western Cape were mostly adults and senior citizens between the ages of 36-50 and 51-70. They travelled in pairs or on their own, with 63.7% of the travellers doing so for leisure/holiday purposes.
- Over 40% of visitors stayed overnight in the province, while 35.1% were day visitors. Visitors on average stayed two nights in the various regions and 24.0% indicated stays of up to a week or more. Self-catering establishments and guesthouse were the most popular choices of accommodation.
- More than 50% of visitors preferred to use their own vehicles while travelling in the province and the top choice of activities included cuisine, scenic drives and visits for cultural/heritage purposes.
- Some 33.5% of visitors spent more than R2000 on accommodation, while 26.6% spent between R1 001-R2 000 and 19.8% of visitors spent on average R501 – R1 000 daily.
- Key information sources that played a major role in drawing visitors to the Western Cape were visitor information centres (21.4%), word of mouth (20.2%) and the internet (11.1%). This indicates that visitor information centres were effective in promoting the different regions in the Western Cape.
- Domestic visitors travelled in the Western Cape between July to December, while overseas visitors preferred to travel to the region in April and from August to December.

2. Methodology and Sample Size

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.

Between **January to December 2022**, a total of **10 845** responses to the regional visitor tracking surveys were received from the various tourism offices in the Western Cape. The participating tourism offices were:

Region	Number of Surveys
Garden Route & Klein Karoo	522
Overberg	4 472
West Coast	2 438
Winelands	3 413



Source: Wesgro, 2023

Western Cape Visitor Trends & Patterns

Wesgro Primary Research: Regional Visitor Tracking Surveys

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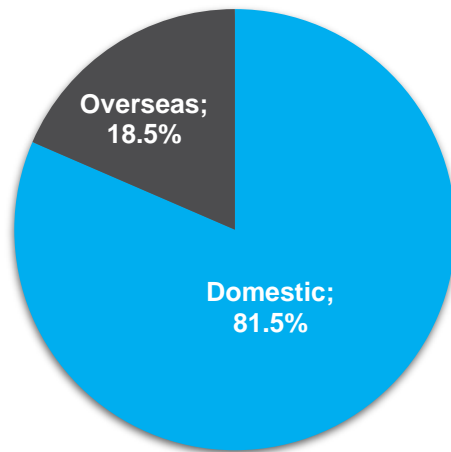
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3. Visitor Trends & Patterns

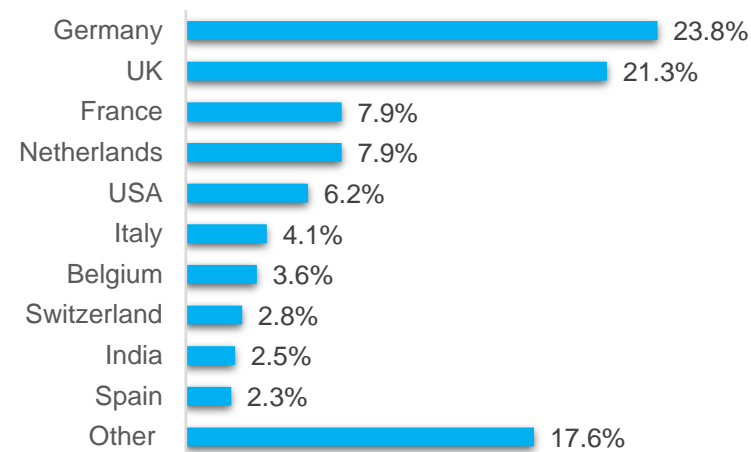
3.1 Origin of Visitors

- The domestic market accounted for the largest share (81.5%) of respondents between January and December 2022 whereas 18.5% of respondents were overseas travellers.
- Most of the international travellers to the Western Cape originated from Germany. This was followed by the UK, with a share of 21.3% of visitors to the region, and France which accounted for 7.9% of the visitors.
- The largest share of domestic travellers (79.0%) were from the Western Cape, which confirms that locals enjoy the diversity of tourism offerings in the province. Gauteng and KwaZulu-Natal ranked as the other leading source provinces for visitors to the Western Cape.

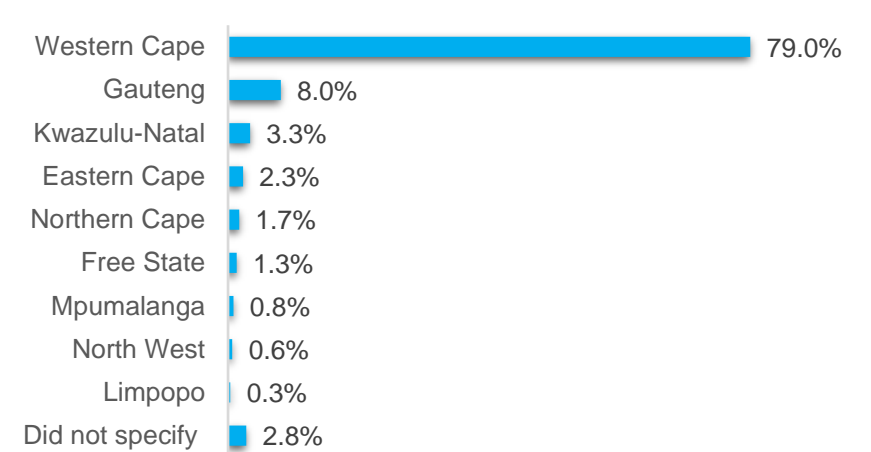
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE WESTERN CAPE, JAN-DEC 2022



TOP INTERNATIONAL MARKETS TO THE WESTERN CAPE, JAN-DEC 2022



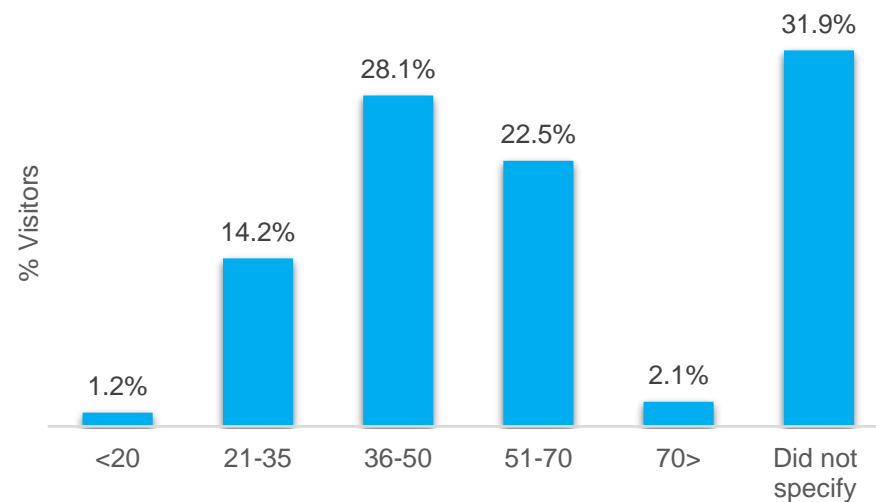
% SHARE OF DOMESTIC VISITORS TO THE WESTERN CAPE, JAN-DEC 2022



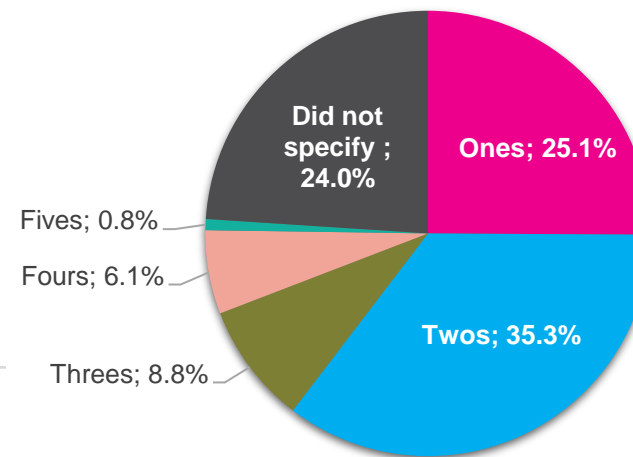
3. Visitor Trends & Patterns

- Most visitors to the Western Cape were in the age groups of 36—50 and 51—70 years.
- The largest proportion of respondents (35.3%) travelled to the province in pairs, followed by 25.1% who travelled on their own.
- More than 60% of the visitors travelled to the Western Cape primarily for leisure/holiday and 6.3% visited friends and relatives. Some came for events/festivals (2.6%) and business (3.1%), whereas others visited for purposes of education, medical/health reasons, sports and religion.
- These figures showed that leisure and holiday offerings in the Western Cape were attractive to mostly adults and senior citizens who could be classified as solo travellers or visitors travelling as couples or travelling as friends.

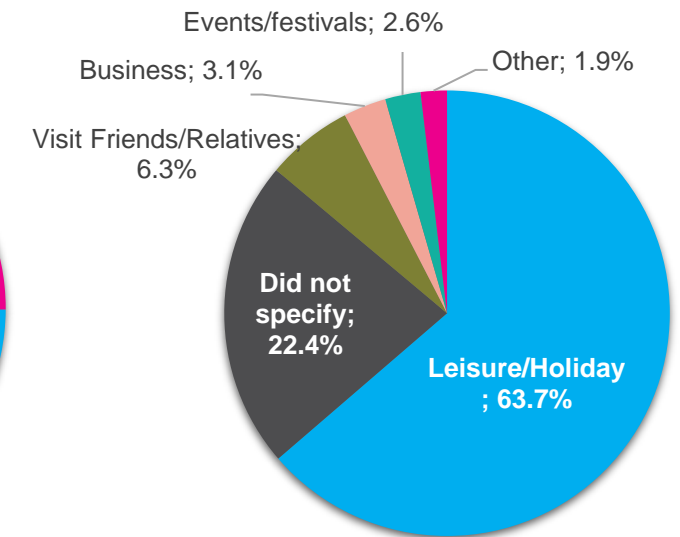
3.2 Age Profile of Visitors



3.3 Travel Group Size



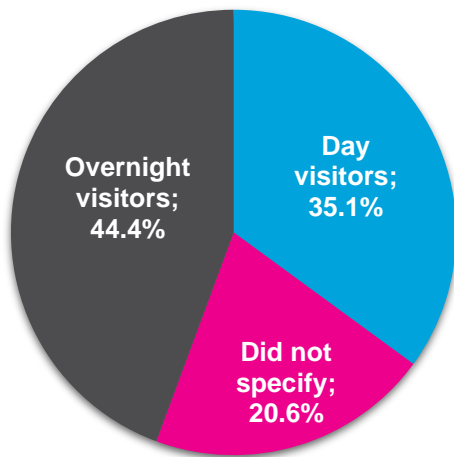
3.4 Purpose of Visit



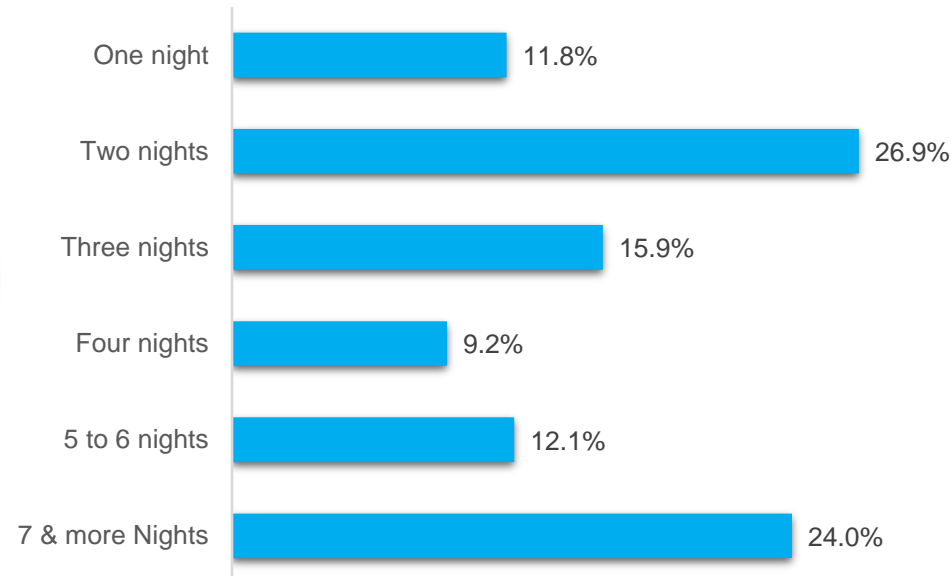
3. Visitor Trends & Patterns

- Between January and December 2022, 35.1% of visitors took day trips to the Western Cape regions and 44.4% of visitors stayed overnight. During this period, visitors stayed on average for two, three and seven or more nights in the Western Cape. A relatively high share of respondents (20.6%) did not indicate whether they were day or overnight visitors.
- These figures underline the Western Cape’s popularity as a place for weekend getaways. Extended holidays of up to a week and more ranked as the second most popular length of stay among visitors (24.0%).
- Self-catering establishments, guesthouses, bed and breakfast (B&B) and hotels ranked as the top accommodation choices among travellers. This indicates that most visitors preferred accommodation that was affordable, offered flexibility of location and provided them with the freedom to prepare their own meals.

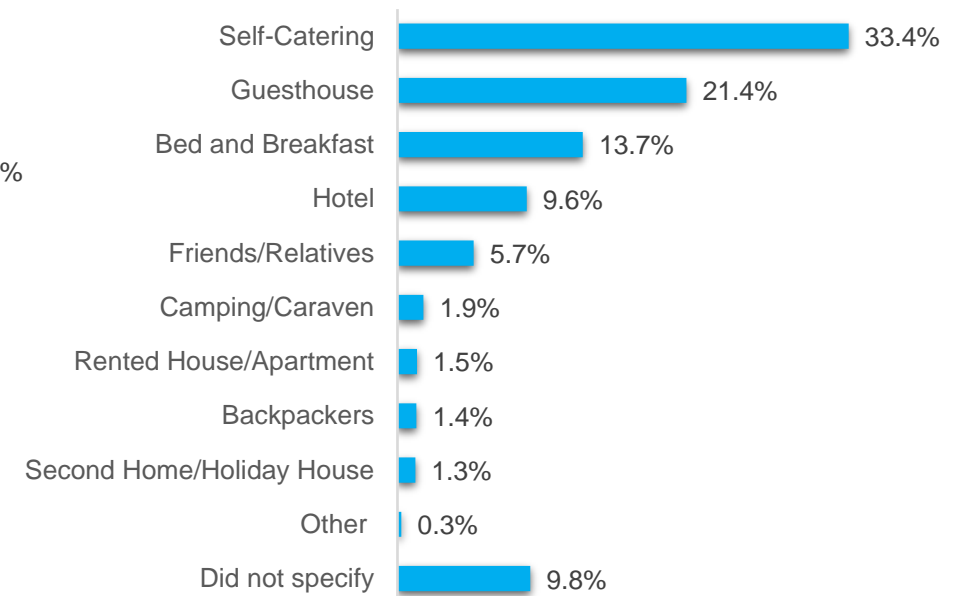
3.5 Overnight Stay & Day Visitors



3.6 Average Length of Stay



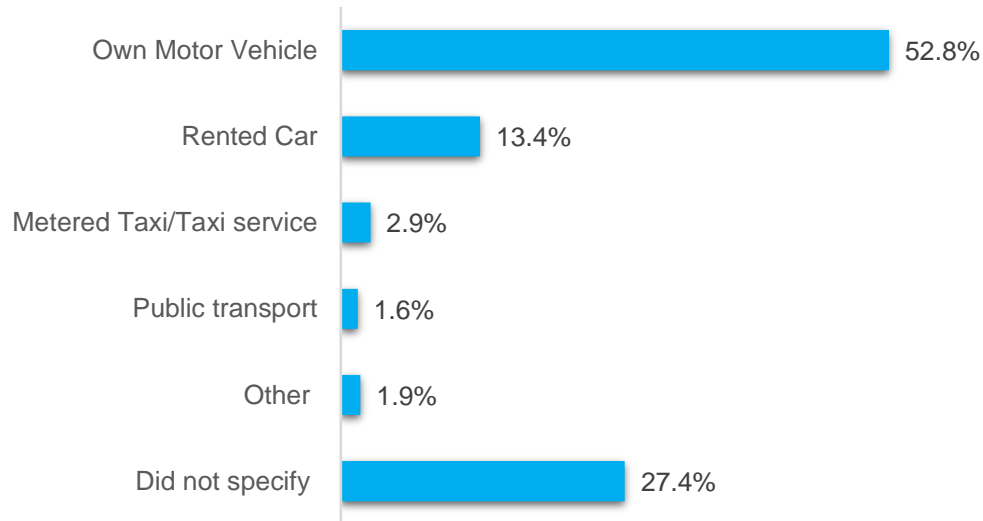
3.7 Accommodation Usage



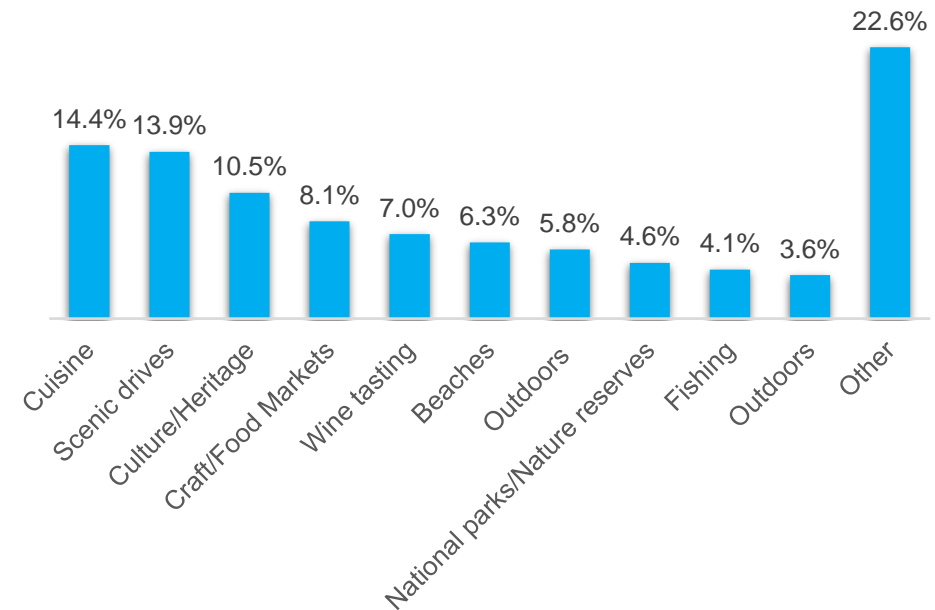
3. Visitor Trends & Patterns

- Some 52.8% of visitors to the Western Cape preferred to use their own vehicles. This was largely due to the fact that most visitors who travelled in the region were from the Western Cape. Rented cars (used by 13.4% of visitors) ranked as the second most popular type of transport choice.
- The top three activities enjoyed by visitors to the Western Cape were cuisine (enjoyed by 14.4% of visitors), scenic drives (13.9%) and cultural / heritage activities (10.5%). These activities were followed by crafts/food markets, wine tasting, visits to beaches, and outdoor activities. Other activities include whale watching, adventure, shopping, exhibitions and flowers.
- According to an article published in *Daily Maverick* (2023,14 April) visitors want to experience the “real” connection that comes with cuisine or craft/food markets, cultural/heritage experiences and scenic drives connected a destination. Making these activities unique tourism offerings that played a role in drawing visitors’ to the various regions in 2022.

3.8 Mode of Transport



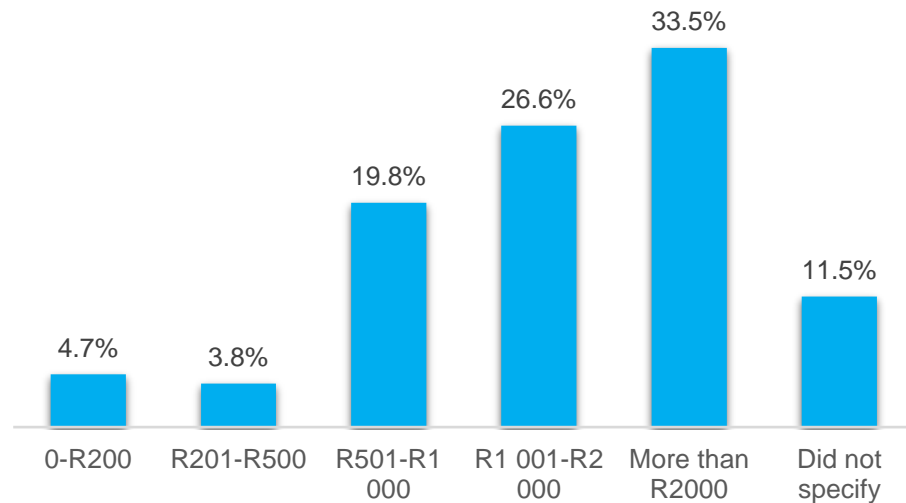
3.9 Top Activities Undertaken in Western Cape



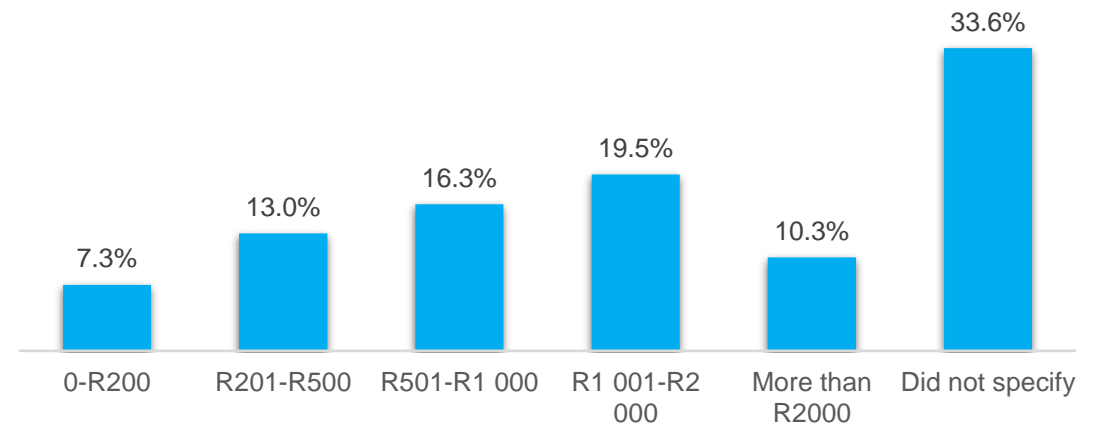
3. Visitor Trends & Patterns

- Aspects such as country of origin, age, size of travel group, reasons for visit, choice of accommodation, type of transport used, the type and number of activities taken, length of stay, month/season for trips and information sources play an important role in influencing visitors' spending behaviour.
- More than 30% of visitors spent more than R2000 on accommodation during their overnight stays in the Western Cape, followed by 26.6% who indicated an average expenditure of R1 001-R2 000, and 19.8% who spent an average of R500-R1 000 daily.
- Regarding average daily spend, 19.5% of visitors spent R1 001-R2 000, followed by 16.3% who indicated an average expenditure of R501-R1 000.
- Although most respondents (33.6%) did not specify their average daily spend, visitors can be classified as medium spenders. This is based on the average amounts they spent on accommodation. This is something that could be used in effective targeting and promotion of accommodation establishments and activities in the Western Cape.

3.10 Average Spend on Accommodation



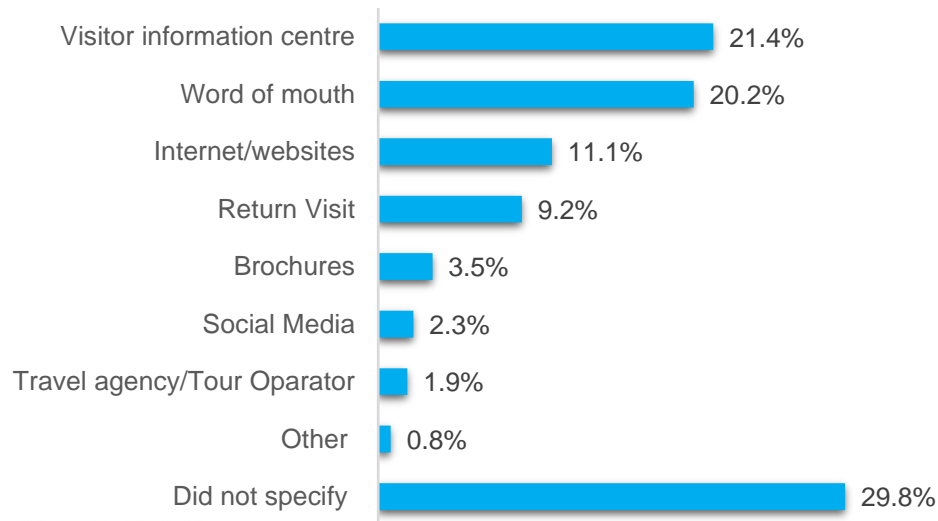
3.11 Average Daily Spend



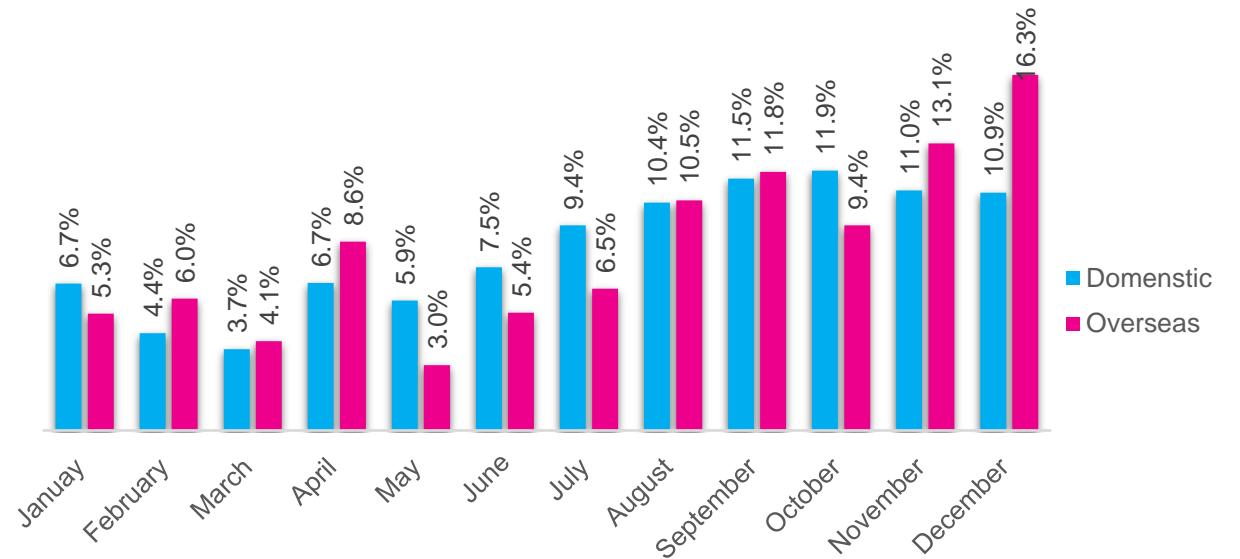
3. Visitor Trends & Patterns

- Consumer studies report that information sources can influence an individual’s decision-making process when preparing for a trip, choosing a destination and the type of experiences/activities and accommodation establishments.
- Visitor information centres ranked as the top information sources with some 21.4% of visitors making use of them between January and December 2022, while 20.2% of visitors relied on word of mouth and 11.1% on the internet/websites. This indicates that local visitor information centres and information from relatives/friends/co-workers were effective in promoting the different regions in the Western Cape.
- Most domestic visitors travelled to the Western Cape between July to December 2022, while April and August to December 2022 were the preferred months for overseas visitors. These were preferred months for domestic visitors because of lower prices before peak season and the overseas market visited when they did because of the enviable weather.

3.12 Top Information Sources



3.13 Movement Across the WC by Month



Regional Performance in the Western Cape

Period: January to December 2022

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4. Regional Performance in the Western Cape

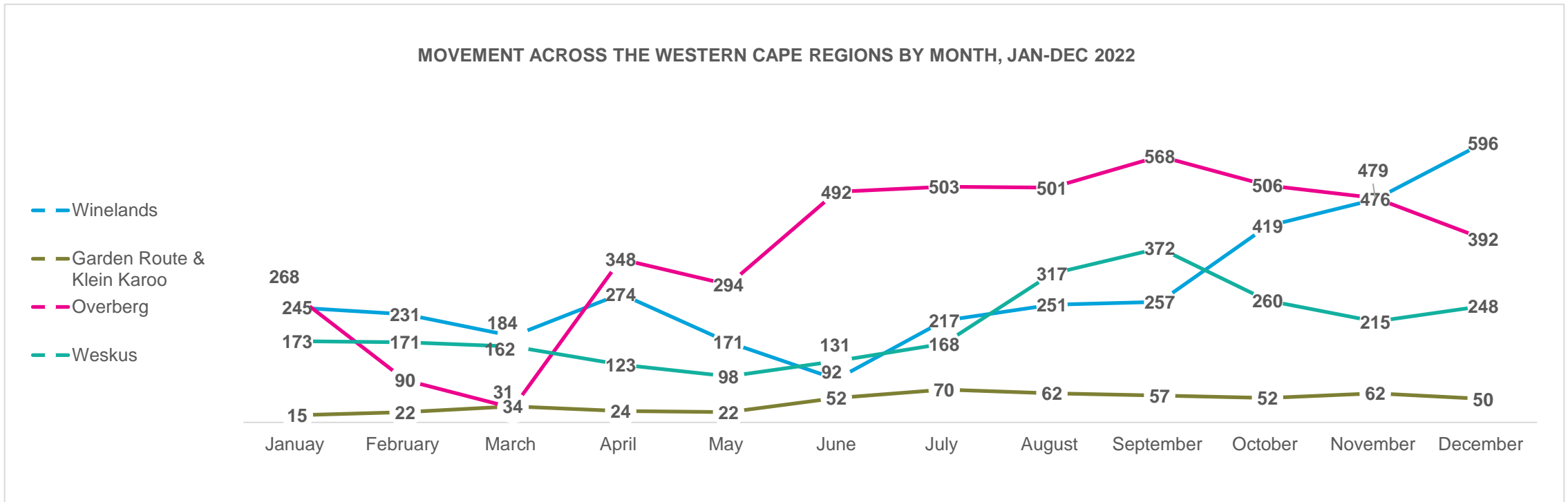
OVERVIEW OF REGIONAL VISITOR TRENDS AND PATTERNS BY REGION, JAN – DEC 2022

Tourism indicator	Winelands	Garden Route & Klein Karoo	Overberg	Weskus
% Share overseas	14.3%	64.8%	78.5%	15.3%
% Share domestic	85.7%	35.2%	21.5%	84.7%
% Share of overnight visitors	20.7%	81.4%	61.3%	38.5%
% Share of day visitors	15.8%	5.9%	38.7%	61.5%
Top international markets	UK (27.8%)	Germany (26.6%)	Germany (25.9%)	UK (22.8%)
	Germany (25.8%)	UK (15.2%)	UK (18.5%)	Germany (14.5%)
	Netherlands (9.6%)	USA (12.0%)	France (11.9%)	Netherland (10.8%)
	Western Cape (64.2%)	Western Cape (50%)	Western Cape (89.2%)	Western Cape (72.1%)
Top domestic markets	Gauteng (7.2%)	Gauteng (13.6%)	Gauteng (5.2%)	Gauteng (11.2%)
	KZN (2.8%)	Eastern Cape (14,2%)	KZN (2.4%)	KZN & Eastern Cape (4.2%)
Main purpose of visit	Leisure/Holiday (35.5%)	Leisure/Holiday (75.1%)	Leisure/Holiday (74.0%)	Leisure/Holiday (81.7%)
Age profile of visitors	51—70 (13.2%)	36—50 (24.9%)	30—50 (41.7%)	36—50 (30.0%)
Group Size	Pairs (16.2%)	Pairs (42.7%)	Pairs (48.8%)	One person (38.6%)
		Groups of four (18.4%)	One person (30.9%)	Group of two (35.7%)
Length of stay	Two nights (9.1%)	Two nights (21.1%)	Seven & more nights (21.4%)	Two nights (15.3%)
		Seven & more nights (17.6%)	Two nights (11.2%)	One night (12.3%)
Mode of transport	Own motor vehicle (23.1%)	Own motor vehicle (54.8%)	Own motor vehicle (69.2%)	Own motor vehicle (63.9%)
	Rented car (8.7%)	Rented car (33.1%)	Rented car (17.2%)	Rented car (8.7%)
Top information sources	Internet/website (10.8%)	Internet/website (32.2%)	Visitor information centre (41.0%)	Word of Mouth (22.7%)
	Word of Mouth (9.3%)	Word of Mouth (24.3%)	Word of Mouth (26.6%)	Visitor information centre (15.0%)
		Return visits (21.1%)	Return visits (13.5%)	Internet/website (13.4%)
Average daily spend	-	R1 001-R2 000 (27.8%)	R1 001-R2 000 (32.2%)	R502-R1 000 (23.7%)
Type of accommodation	-	Guesthouse (29.1%)	Self-Catering (19.4%)	Self-Catering (24.7%)
Top three activities undertaken	Cultural/Heritage (40.9%)	Beaches (17.4%)	Cuisine (16.3%)	Scenic Drives (22.8%)
	Cuisine (26.6%)	Scenic Drives (12.8%)	Crafts/food markets (10.2%)	Wine Tasting (13.5)

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

4. Regional Performance in the Western Cape

- Based on the number of respondents for this primary research, Overberg performed very well with regard to the increase in visitor numbers in comparison with the Winelands, Garden Route, Klein Karoo and Weskus
- Between January to December 2022, visitors were drawn to the Overberg from between June to November, while the Winelands visitor numbers fluctuated in the months of January, February and April, with numbers picking up again from July to December. West Coast had high levels of visitors between August and December, and in Garden Route and Klein Karoo, visitor numbers were slightly high in July and August.

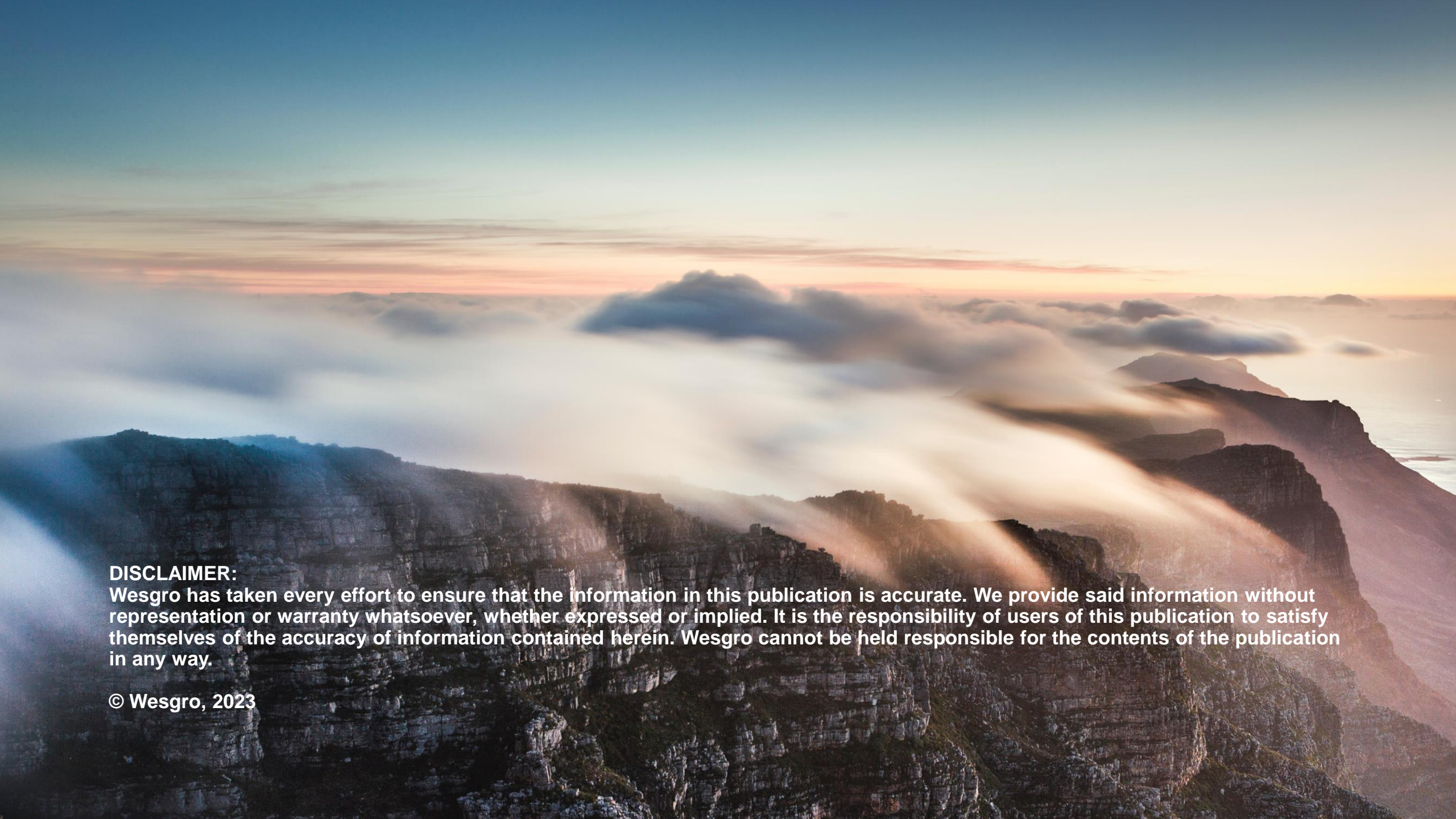


5. Acknowledgements

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

The participating district municipalities:

Garden Route & Klein Karoo
Overberg
Weskus
Winelands



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