



# Youth Tourism Trends in the Western Cape 2020

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# 1. Methodology

This report provides an overview of the tourism trends and patterns amongst visitors aged 21 to 35 years to the Western Cape. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey. In addition, the report aims to provide tourism market insights from qualitative sources for greater awareness of the Youth Tourism market.

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

In 2019, a total of **17,727** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. Close to 16% of these respondents were in the 21 to 35 years age category. This report focuses on the **2762** respondents who were between the ages of 21 and 35 years from the following participating regions:

Cape Garden Route	920
Cape Karoo	210
Cape Overberg	235
Weskus	955
Winelands	442



### 3. Overview of Youth Tourism

- The World Youth Student and Educational (WYSE) Travel Confederation defines youth travel as “*International independent travel for periods of less than one year by people coming from the Millennial and Gen Z generational groups, in part or in full, by a desire to experience other cultures (including cultural exchange visits), build life experience and/ or benefit from formal and informal learning opportunities outside one’s usual environment.*” (WYSE, 2020).
- Research by WYSE Travel Confederation and UNWTO indicated that the total value of the international youth travel market was almost US\$ 190 billion in 2009. By 2018 that figure had risen to more than US\$ 333 billion.
- Millennials are the leading travel group to South Africa. More than half of international tourists who visited South Africa in 2019 were between the ages of 18 and 34 years and 47% of domestic travellers fall in this age category.
- Young travellers are more resilient and less likely to be held back by global economic, political or health factors. A WYSE Travel Confederation survey of youth travellers’ opinions on the 2014 Ebola outbreak indicated that this global health scare had little impact on their travel plans. The World Travel and Tourism Council (WTTC) believes younger travellers aged 18-35, who appear to be less vulnerable to COVID-19, will likely be among the first to begin travelling once again.
- Youth travel behaviour is shifting towards purpose-driven travel, such as work and study abroad, volunteer travel and language learning travel. These more active, purposeful forms of travel are geared towards personal development, and leaving a positive impact on the destination.
- Roughly 50% of millennial (born between 1980 and 2000) and gen Z (born after 2000) travellers are travelling for the purpose of holidays, but the other 50% are undertaking experiential travel such as work abroad, language study, higher education, au pairing, and volunteering. These experiential youth travellers generally stay longer and spend more.
- According to WYSE, young people also add atmosphere and ‘buzz’ to destinations, attracting other visitors and businesses. This effect has been recognised in many cities across the world and there are growing numbers of projects to relocate university facilities in city centres to act as hubs for cultural and creative activities. The provision of student accommodation is often also an important feature of such schemes.

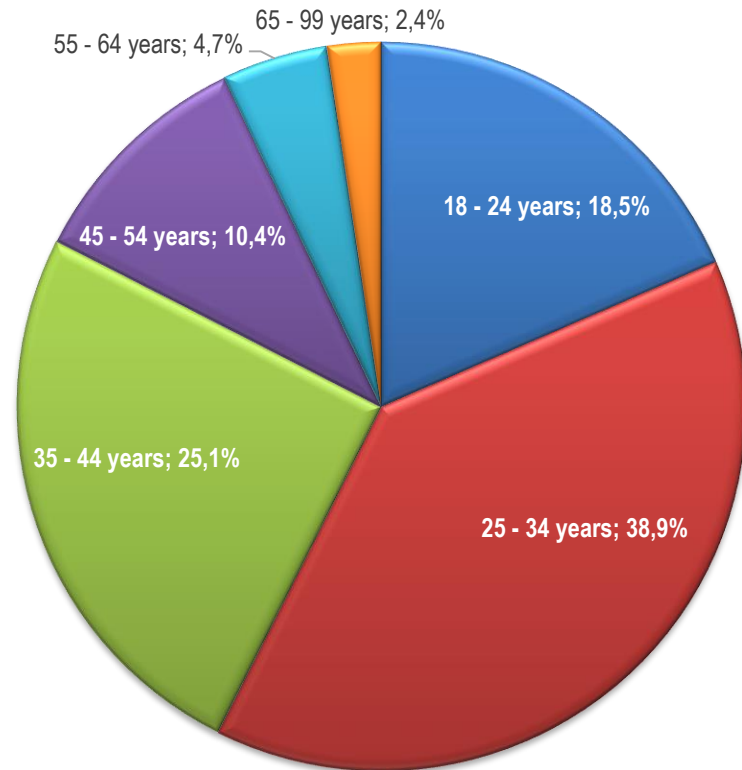


# Youth Tourism Visitor Trends Analysis

## 4.1 Youth Tourism in South Africa

- In 2019, more than half of international tourists visiting South Africa were younger than 35 years of age. Overall, Lesotho, Swaziland, Brazil, Argentina and Mozambique were the top five markets from which young travellers originated during this period.

AGE BREAKDOWN OF INTERNATIONAL VISITORS TO SOUTH AFRICA, 2019

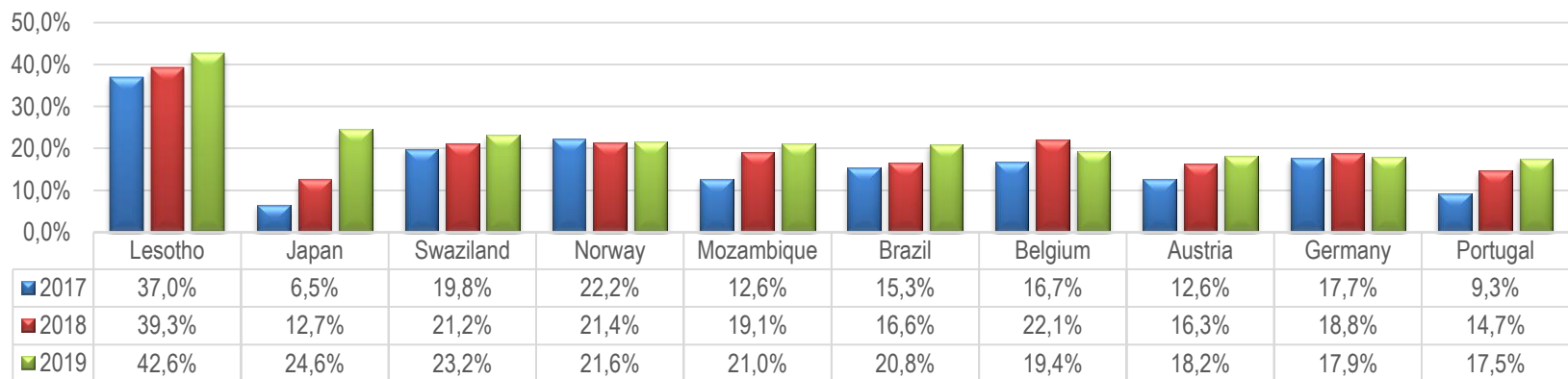


■ 18 - 24 years ■ 25 - 34 years ■ 35 - 44 years ■ 45 - 54 years ■ 55 - 64 years ■ 65 - 99 years

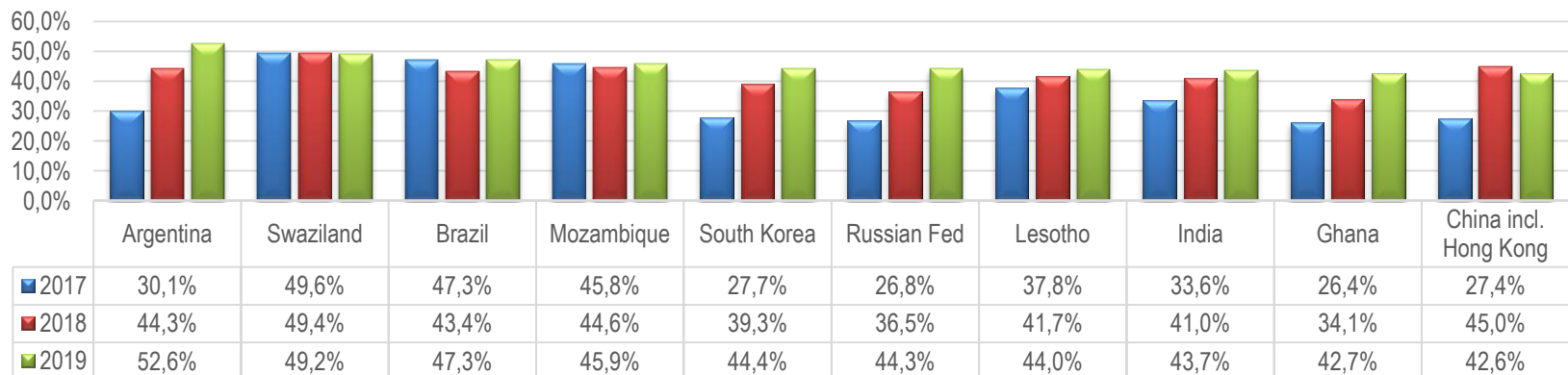
## 4.1 Youth Tourism in South Africa

- In the 18-24 years category, Lesotho, Japan and Swaziland were the top international source markets for South Africa. International travellers who were between the ages of 25 and 34 years were mostly from Argentina, Swaziland and Brazil.
- Young people travelling from Norway, Belgium, Austria, Germany and Portugal were the leading European source markets to South Africa in the 18-24 years age category in 2019.

TOP SOURCE COUNTRIES FOR AGES 18-24 TO SOUTH AFRICA, 2017 - 2019



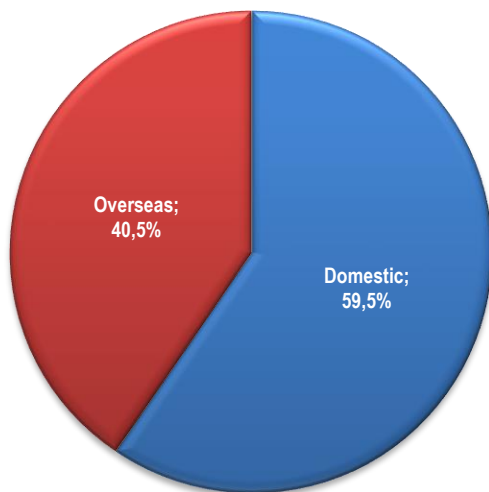
TOP SOURCE COUNTRIES FOR AGES 25-34 TO SOUTH AFRICA, 2017 - 2019



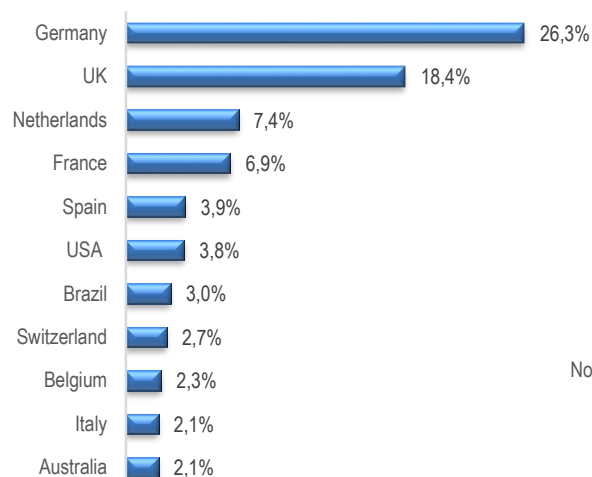
## 4.2 Youth Tourism Trends in the Western Cape

- Similar to the general visitor trends in the Western Cape, around 60% of survey respondents aged 21-35 years were from the domestic market and 40% came from overseas markets.
- As the leading source region for the Western Cape, Europe continues to dominate amongst young travellers with 9 out of the top 11 international markets in the 21-35 years age category originating from the continent.
- The Western Cape's top North American market, the United States, also ranked in the top 10 markets who were in this age category.
- From the domestic market, the Western Cape (56.9%), Gauteng (9.8%) and Kwazulu-Natal (3.4%) ranked as the top three source provinces for visitors aged 21-35 years.
- The high number of young Western Cape locals travelling within their province indicates that local tourism also remains a very important market for the tourism sector, particularly due to the many economic challenges the market is facing.

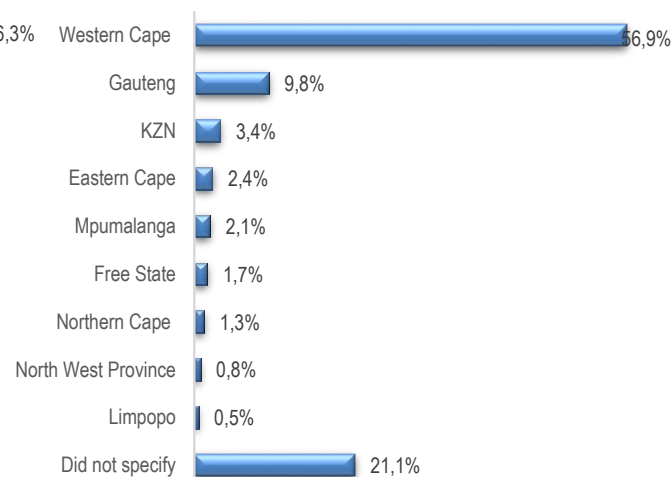
ORIGIN OF VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019



TOP INTERNATIONAL SOURCE MARKETS OF VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019



% SHARE OF DOMESTIC SOURCE MARKETS OF VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019





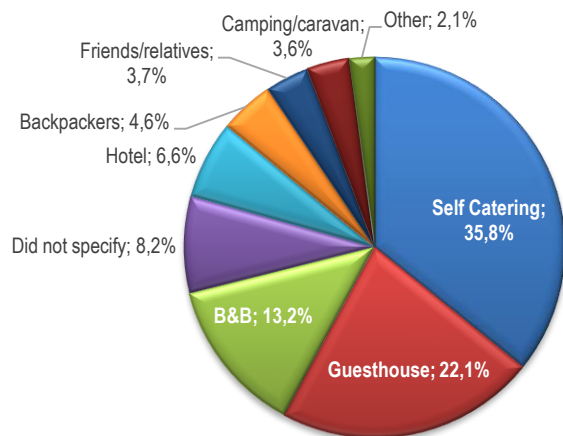
## 4.2 Youth Tourism Trends in the Western Cape

- Overall visitors to the Western Cape indicated to be majority overnight visitors and 54,7% of respondents in the 21-35 years age category indicated to be overnight visitors as well.
- Those who stayed overnight spent an average of one night (29,3%), two nights (38,2%), or three nights (15,3%) in the province. The two night average in the 21-35 years age category is slightly higher than the general average length of stay in the Western Cape (32,2%).
- This trend underlines the Western Cape's desirability for weekend getaways and the popularity of day excursions for locals.
- Self Catering, Guesthouse, and B&B were amongst the top accommodation choices for respondents aged 21-35 years in the Western Cape in 2019.

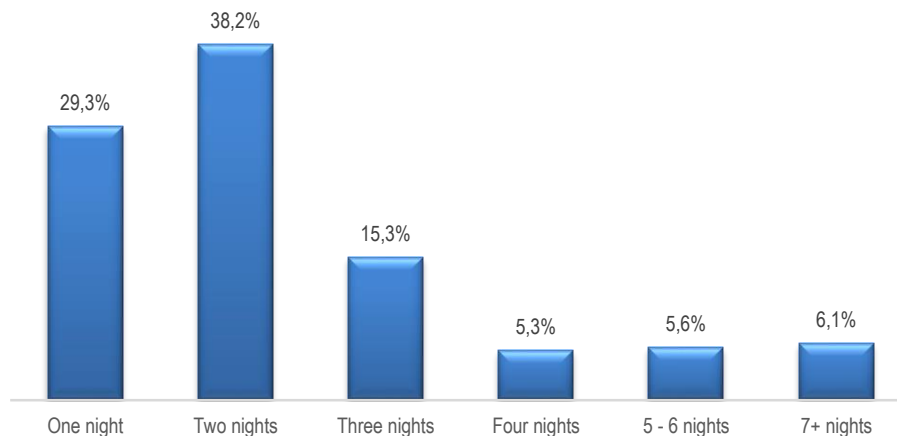
OVERNIGHT & DAY VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019



TYPE OF ACCOMMODATION USED BY VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019



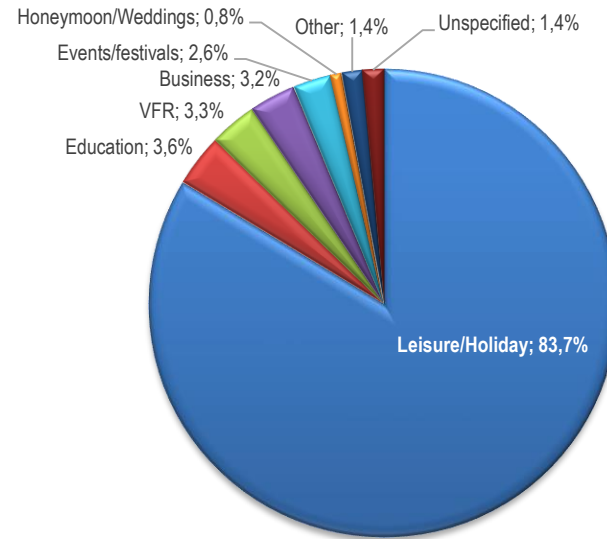
AVERAGE LENGTH OF STAY OF OVERNIGHT VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019



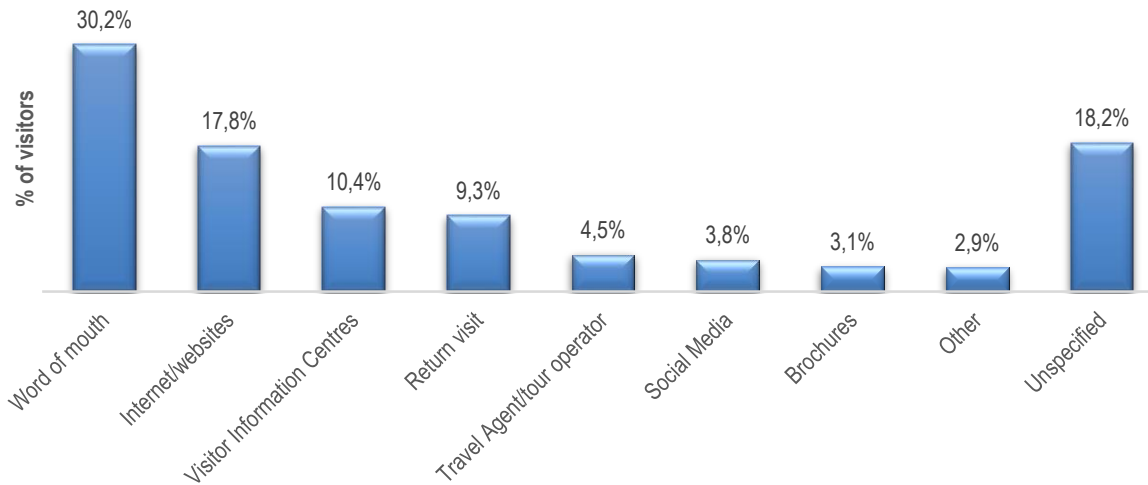
## 4.2 Youth Tourism Trends in the Western Cape

- The vast majority of respondents aged 21 to 35 said that they visited mainly for Leisure purposes and 3,6% had visited mainly for the purpose of Education.
- The University of Cape Town was ranked as the leading University in Africa, according to QS World University Rankings 2021. In addition, Stellenbosch University located in the Cape Winelands ranked in 5<sup>th</sup> place, making the Western Cape an ideal destination for edu-tourists.

MAIN PURPOSE OF VISIT OF VISITORS AGED 21-35 YEARS IN THE WESTERN CAPE, 2019



SOURCE OF INFORMATION USED BY VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019

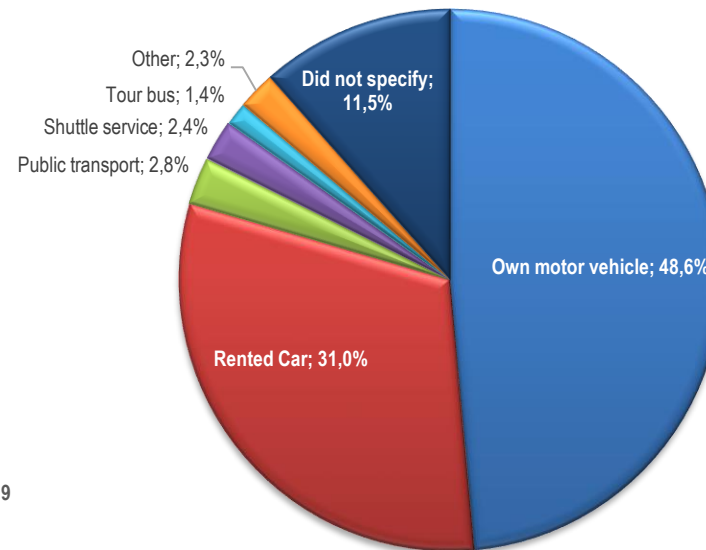


- According to respondents aged 21 to 35, word of mouth (30,2%) and the internet (17,8%) holds the greatest return on investment as effective marketing tools.
- From these trends an evident shift can be seen from marketing collateral to online platforms.

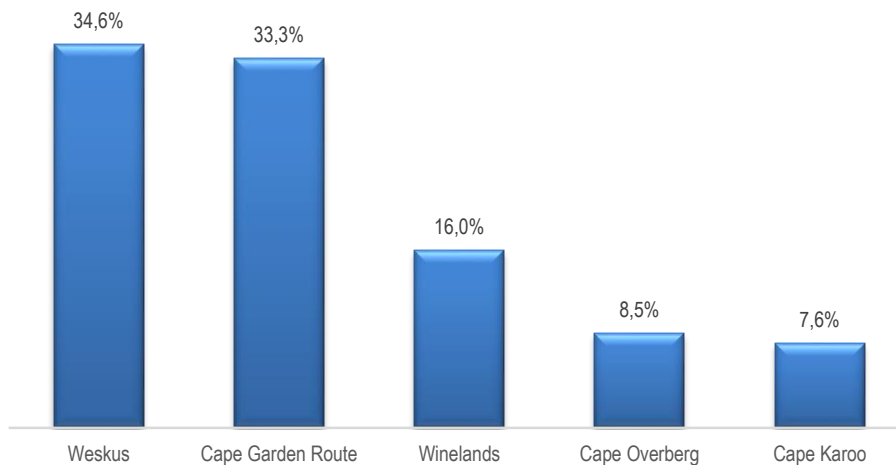
## 4.2 Youth Tourism Trends in the Western Cape

- The vast majority of respondents in the 21-35 years age category indicated to have travelled by rented car (31,0%) or via their own motor vehicles (48,6%).
- This suggests that visitors in this age category prefer to explore on their own rather than with a tour group. It should, however, be noted that visitors travelling with a tour group may be less likely to stop in at the local visitor information centres where survey responses were gathered.
- The high number of locals travelling within the Western Cape is a major contributor to these figures as well.

MODE OF TRANSPORT USED BY VISITORS AGED 21-35 YEARS TO THE WESTERN CAPE, 2019



% SHARE OF VISITORS AGED 21-35 YEARS BY REGION, 2019



- The most visited region for visitors aged 21-35 was Weskus (34,6%), followed closely by the Cape Garden Route (33,3%) in 2019.
- This is not surprising as the Weskus as well as the Cape Garden Route are home to many adventure sites and picturesque beaches for the young traveller to enjoy.

## 5. Key Findings

- The total value of the international youth travel market was valued at an estimated US\$ 190 billion in 2009 and that figure had risen to more than US\$ 333 billion by 2018 (WYSE). Youth travel behaviour is shifting towards purpose-driven travel, such as work and study abroad, volunteer travel and language learning travel. These more active, purposeful forms of travel are geared towards personal development, and leaving a positive impact on the destination.
- Young travellers are more resilient and less likely to be held back by global economic, political or health factors and it is likely that younger travellers aged 18-35, who appear to be less vulnerable to COVID-19, will be among the first to begin travelling once again
- Millennials are the leading travel group to South Africa. More than half of international tourists who visited South Africa in 2019 were between the ages of 18 and 34 years and 47% of domestic travellers fall in this age category. Lesotho, Swaziland, Brazil, Argentina and Mozambique were the top five international markets from which young travellers originated during this period.
- Similar to the general visitor trends in the Western Cape, around 60% of survey respondents aged 21-35 years were from the domestic market and 40% came from overseas markets.
- As the leading source region for the Western Cape, Europe continues to dominate amongst young travellers with 9 out of the top 11 international markets in the 21-35 years age category originating from the continent.
- More than half of all domestic youth travellers originated from the Western Cape which suggests that many locals are taking short breaks to different regions within the province.
- Just over half of youth travellers to the Western Cape indicated to be overnight visitors in 2019, who spent an average of one, two, or three nights in the destination. Self-Catering, Guesthouse, and B&B were among their top accommodation choices.
- The vast majority of respondents in the 21-35 years age category indicated to have travelled by rented car (31,0%) or via their own motor vehicles (48,6%). This suggests that visitors in this age category prefer to explore on their own rather than with a tour group. The high number of locals travelling within the Western Cape is a major contributor to these figures.
- The University of Cape Town was ranked as the leading University in Africa, according to QS World University Rankings 2021. In addition, Stellenbosch University located in the Cape Winelands ranked in 5<sup>th</sup> place, making the Western Cape an ideal destination for young edu-tourists.
- The Weskus and Garden Route & Klein Karoo were the most visited regions for travellers aged 21-35 in 2019. This is not surprising as the Weskus as well as the Cape Garden Route are home to many adventure sites and picturesque beaches for the young traveller to enjoy.

## 6. List of Sources

- South African Tourism
- Wesgro Primary Research
- United Nations World Tourism Organization (UNWTO)
- World Youth Student and Educational (WYSE) Travel Confederation
- World Travel and Tourism Council (WTTC)

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