

Garden Route

September 2021

EXECUTIVE SUMMARY

This destination sector fact sheet provides key trade and investment related statistics for the Garden Route district municipality. Specifically, it shows the Garden Route district's area, population, employment, trade, investment, and tourism trends with the rest of the world. The key highlights are provided below:

ECONOMY

- From 2016 to 2020, the economy of the Garden Route district grew by an average annual growth rate of 3.8%. The district's economic growth rate declined by -2.5% in 2020 due to the adverse impact of the COVID-19 pandemic.
- The George local municipality was the largest contributor to GDP in the Garden Route district from 2016-2020, accounting for 40% of GDP, followed by Mossel Bay and Oudtshoorn, which accounted for 17.2% and 12.9%, respectively.
- The finance, insurance, real estate, and business services sector was the largest contributor to the Garden Route's GDP in 2020, accounting for 25.84%, followed by the wholesale and retail trade, catering, and accommodation sector at 17.98%, and the manufacturing sector at 14.76%.
- The food, beverages and tobacco sector were the largest contributor to the Garden Route's manufacturing sector, accounting for 37% in 2020.
- Business services was the largest contributor to the Garden Route's services sector, accounting for 26% in 2020.

TRADE

- In 2020, total exports from the Garden Route district increased by 17.45% to ZAR4.26bn in 2020 from a value of ZAR3.63bn in 2018. In contrast, imports increased by 282.09% to ZAR6.22bn in 2020 from a value of ZAR1.63bn in 2019.
- The top destination markets for exports from the Garden Route district in 2020 were the Netherlands (11.66%), the United States (8.52%), China (7.02%), and France (6.08%).
- The top source markets for imports into the Garden Route were India, which accounted for 18.97% of imports in 2020, followed by Singapore (14.33%), China (12.92%), and Nigeria (11.38%).

INVESTMENT

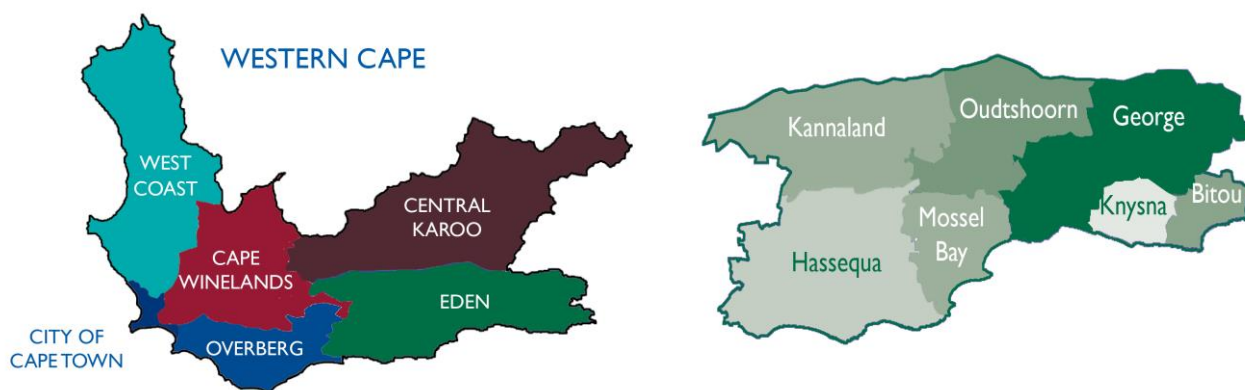
- The Garden Route district attracted seven FDI projects from January 2003 to December 2020. Five of the projects were in Mossel Bay, one in George, and one in Hooqekrall. These projects were valued at ZAR21.69bn, creating a total of 625 jobs.

TOURISM

- 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.
- 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 of the year, reaching 46 668 visitors in December 2020, a 54% decline from the previous year.
- Germany (37.4%), the United Kingdom (19.6%), and the Netherlands (7.8%) were the top source countries for visitors into the Garden Route and Klein Karoo in 2019.
- 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.

1. AREA

The Garden Route district is one of six districts located in the Western Cape and it is located in the south-east of the province. The district occupies a total land area of 23,331km² and has a population of 612 903 people. The inhabitants are predominantly Afrikaans speaking, with 75.6% of the population speaking the language, followed by Xhosa (17.3%), and English (6.2%). The largest ethnic group in the district are Coloured people (54.2%), followed by Africans (28.5%) and White people (16.9%). The district is comprised of seven municipalities, namely, Kannaland, Hessequa, Mossel Bay, George, Oudtshoorn, Bitou, and Knysna.



2. GENERAL INFORMATION

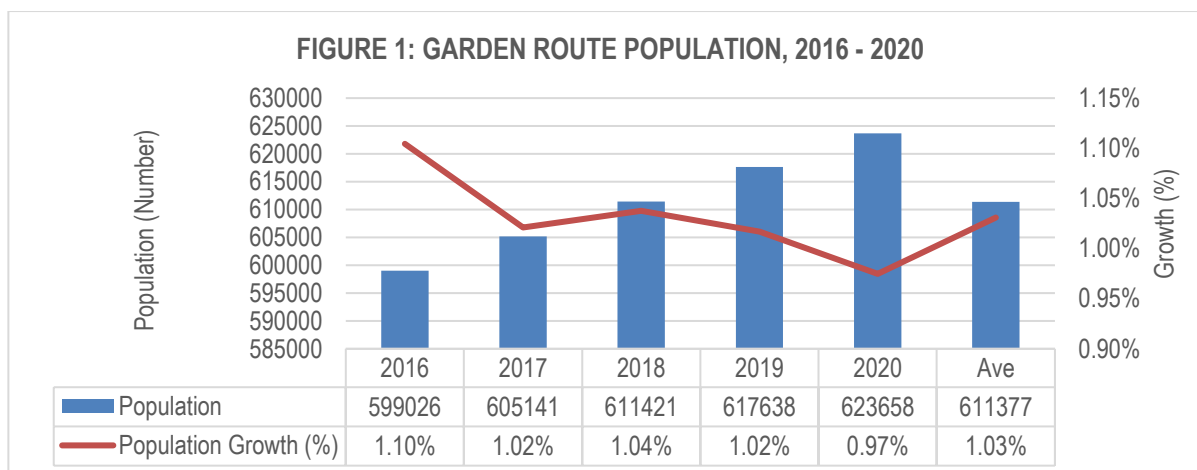
TABLE 1: GARDEN ROUTE DISTRICT KEY INDICATORS

Executive Mayor	Memory Booysen
Population (2020)	623,658
Total Area	23,331 km ²
GVA at basic prices (2020)	ZAR45.08bn
Real GVA (2020) (constant 2010 prices)	ZAR28.29bn
Unemployment (2020)	15.38%
Ethnic groups (2019)	Coloured, Black African, White, and Indian and Asian
Languages	Afrikaans (75.6%); Xhosa (17.3%); English (6.2%)
Matric Pass Rate (2019)	85.10%
Gini Coefficient (2019)	0.558
HDI (2020)	0.755

Source: Quantec, 2021; Garden Route District Municipality Socio-economic Profile 2020

2.1 DEMOGRAPHICS

With a population of 623,658 in 2020, the Garden Route district was the third most populous district in the Western Cape, after the City of Cape Town, and the Cape Winelands district. The Garden Route's population is estimated to have grown by an annual average growth rate of 1.03% between 2016 and 2020.



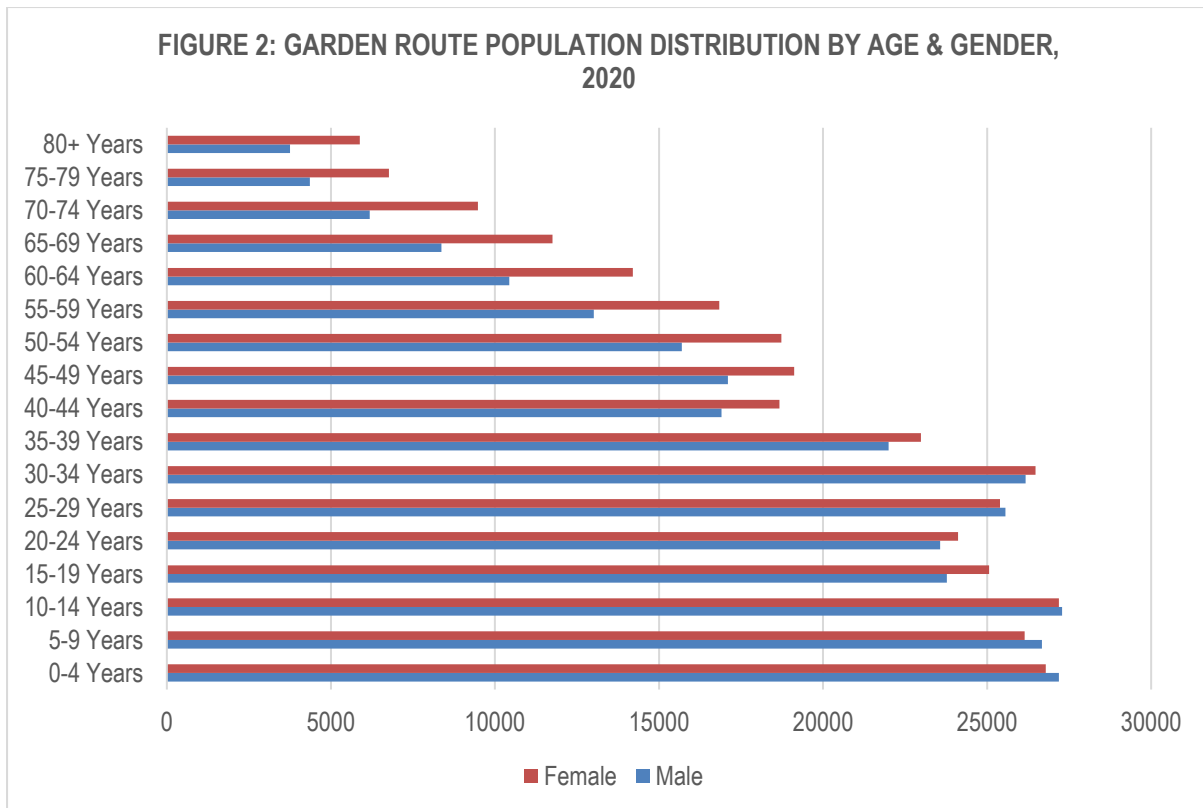
Source: Quantec, 2021

The table below shows the Garden Route district's population breakdown by ethnic groups. In 2020, the Coloured population represented the largest ethnic group, accounting for 54.03%, followed by Africans (29.10%), and Whites who accounted for 16.43%.

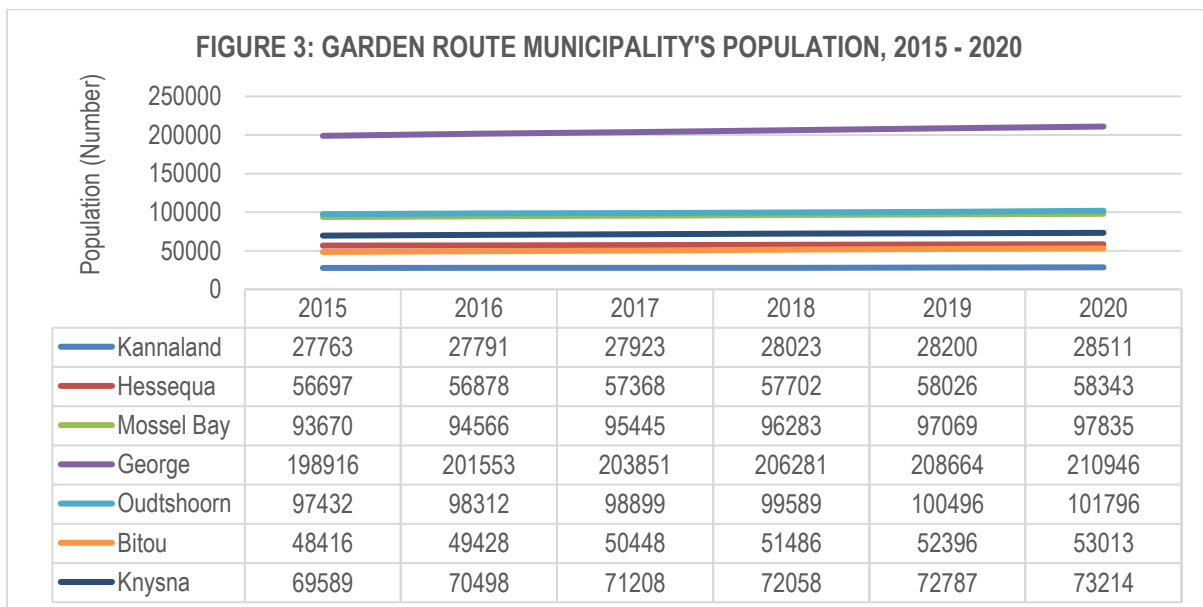
TABLE 2: GARDEN ROUTE POPULATION BREAKDOWN BY GROUP (2018 - 2020)					
GROUP	2018	2019	2020	% SHARE 2020	% CHANGE, 2019 - 2020
Coloured	330 468	333 746	336 934	54.03%	0.96%
Black African	174 045	177 894	181 509	29.10%	2.03%
White	104 322	103 343	102 483	16.43%	-0.83%
Asian/Indian	2 587	2 654	2 733	0.44%	2.96%
TOTAL	611 421	617 638	623 658	100.00%	0.97%

Source: Quantec, 2021

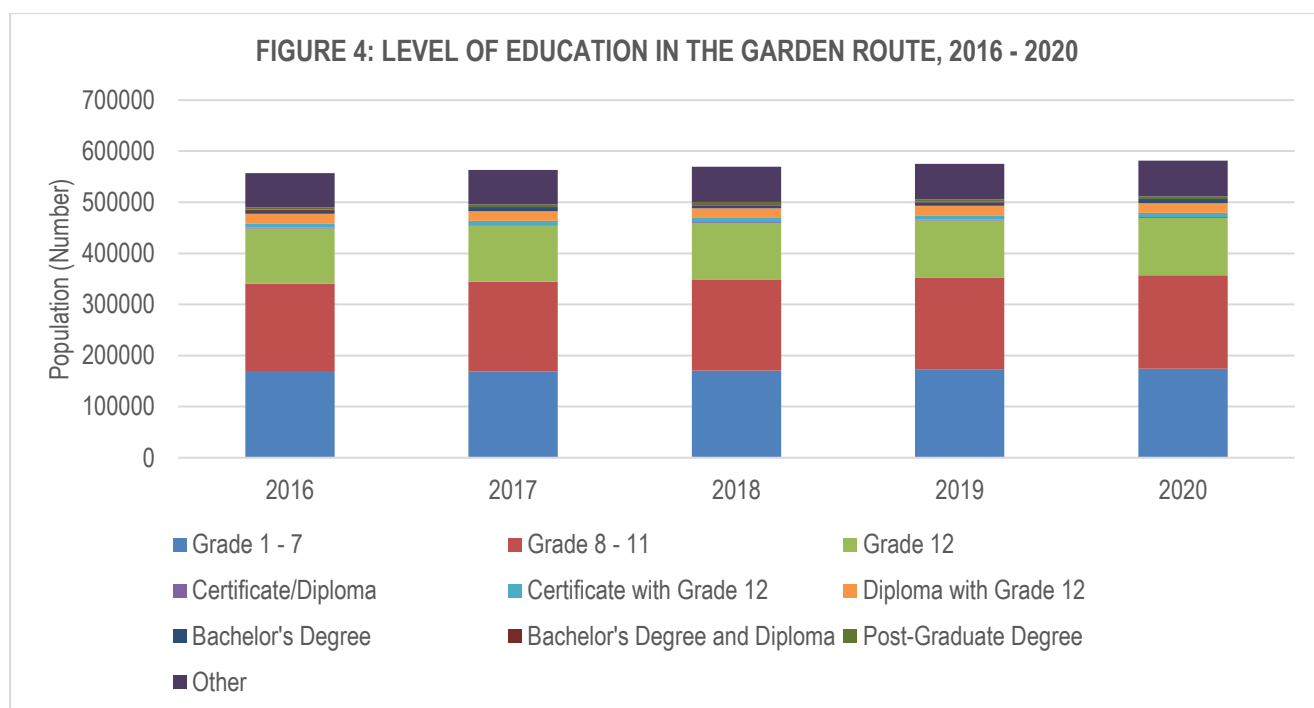
The bar chart below shows the age and gender breakdown of the population of the Garden Route district. As is shown in the graph, the largest percentage of the population are below 35 years of age, indicating that the majority of the population is still young.



Within the Garden Route district, the George local municipality recorded the biggest population between 2015 and 2020. This local municipality recorded a population of 210,946 in 2020, followed by the Oudtshoorn and Mossel Bay local municipalities with 101,796 and 97,835 people, respectively.



The Garden Route's educational output increased steadily over the period 2016 to 2020. The number of students with matric certificates increased by an average annual rate of 1.15% over the period 2016 to 2020, while those with bachelor's degrees and postgraduate degrees increased by an average annual growth rate of 0.23% and 0.09%, respectively from 2016 to 2020.



Source: Quantec, 2021

2.2 EMPLOYMENT

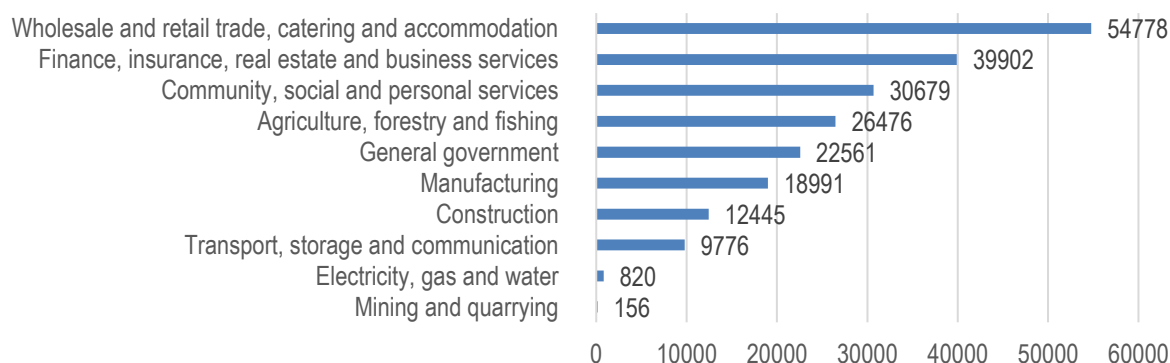
The table below provides a snapshot of indicators for employment in the Garden Route district in 2020. The unemployment rate at this time was 15.38%, with 216,584 people employed from a working age population of 405,818 people.

TABLE 3: EMPLOYMENT INDICATORS GARDEN ROUTE, 2020	
Population aged 15-64 years	405,818
Labour force participation rate (%)	63.07
Employed	216,584
Formally Employed	159,015
Informally Employed	57,569
Unemployed	39,372
Not economically active	149,861
Unemployment rate (%)	15.38

Source: Quantec, 2021

The Garden Route's wholesale and retail trade, catering and accommodation sector was the largest employer in 2020 with 54,778 people, followed by the finance, insurance, real estate, and business services, which employed 39,902 people. The community, social and personal services sector in turn employed 30,679 people.

FIGURE 5: EMPLOYMENT IN THE GARDEN ROUTE, 2020



Source: Quantec, 2021

3. ECONOMIC OVERVIEW

3.1 ECONOMIC PERFORMANCE

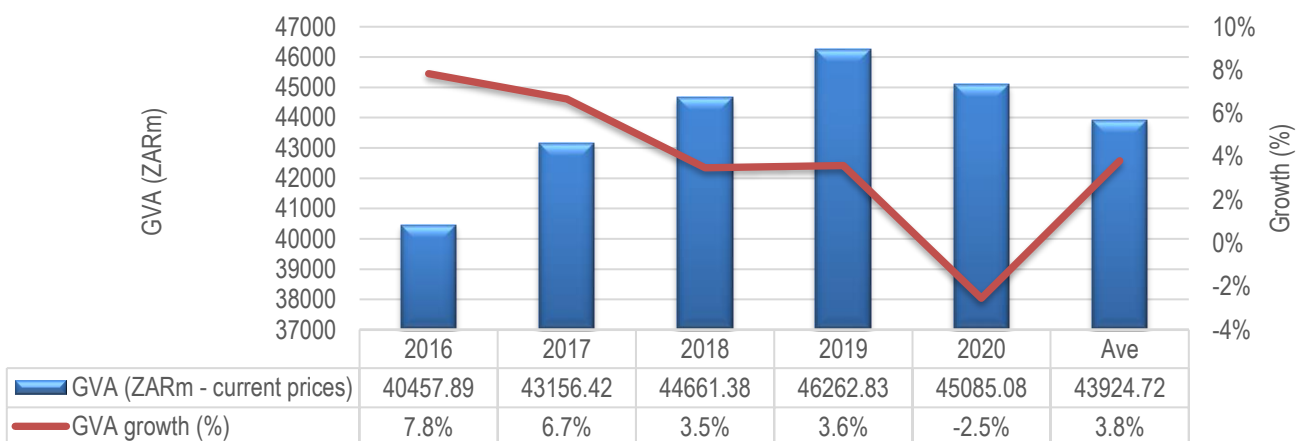
The key economic sectors in the Garden Route district are:

- **Agriculture and fishing** - the district is an ideal location for various agricultural and niche activities due to its topographical and climatic diversity. Agricultural activities include dairy, fruit, vegetable, and sheep products, as well as unique products like ostriches, forestry products, aloe, hops, and essential oils.
- **Manufacturing** – agro-processing and forestry form a large part of the manufacturing base and are supported by niche industries.
- **Construction** – the construction industry is well-supported by tourism and real estate investments which have continued to increase. The upgrading of facilities has also contributed to the growth of this sector.

From 2016 to 2020, the economy of the Garden Route district grew by an average annual growth rate of 3.8%. In 2020, the economy experienced negative growth of -2.5%, primarily due to the adverse effects of the novel COVID-19 pandemic impacting markets globally.

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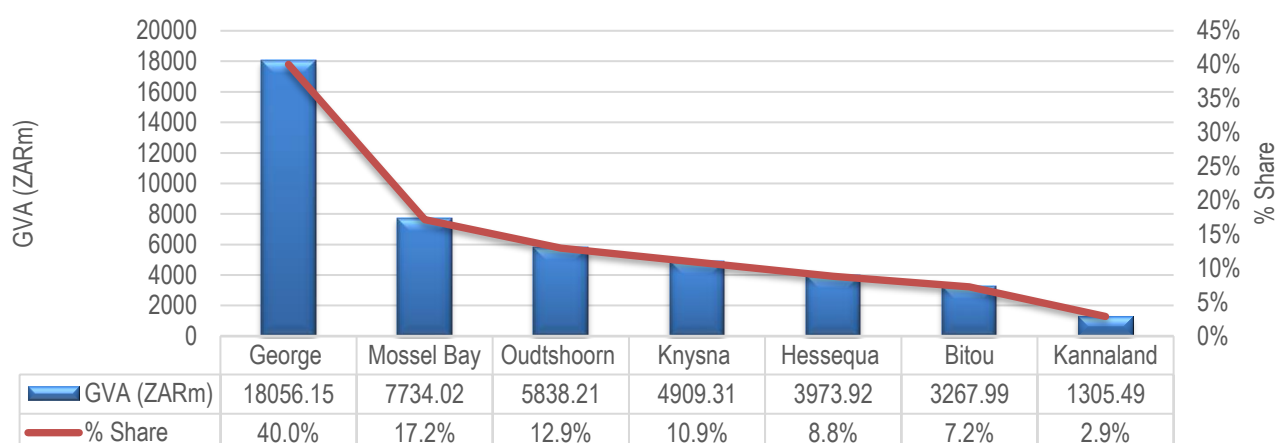
FIGURE 6: GARDEN ROUTE, GVA and YoY GROWTH, 2016 - 2020



Source: Quantec, 2021

The George local municipality was the largest contributor to GVA in the Garden Route district in 2020, accounting for 40% of total GVA, followed by Mossel Bay, and Oudtshoorn, accounting for 17.2% and 12.9% respectively.

FIGURE 7: LOCAL MUNICIPALITY CONTRIBUTION TO GARDEN ROUTE DISTRICT GVA, 2020



Source: Quantec, 2021

The finance, insurance, real estate, and business services sector was the largest contributor to the Garden Route's GDP in 2020, accounting for 25.84%, followed by wholesale and retail trade, catering, and accommodation sector at 17.98%, and the manufacturing sector at 14.76%.

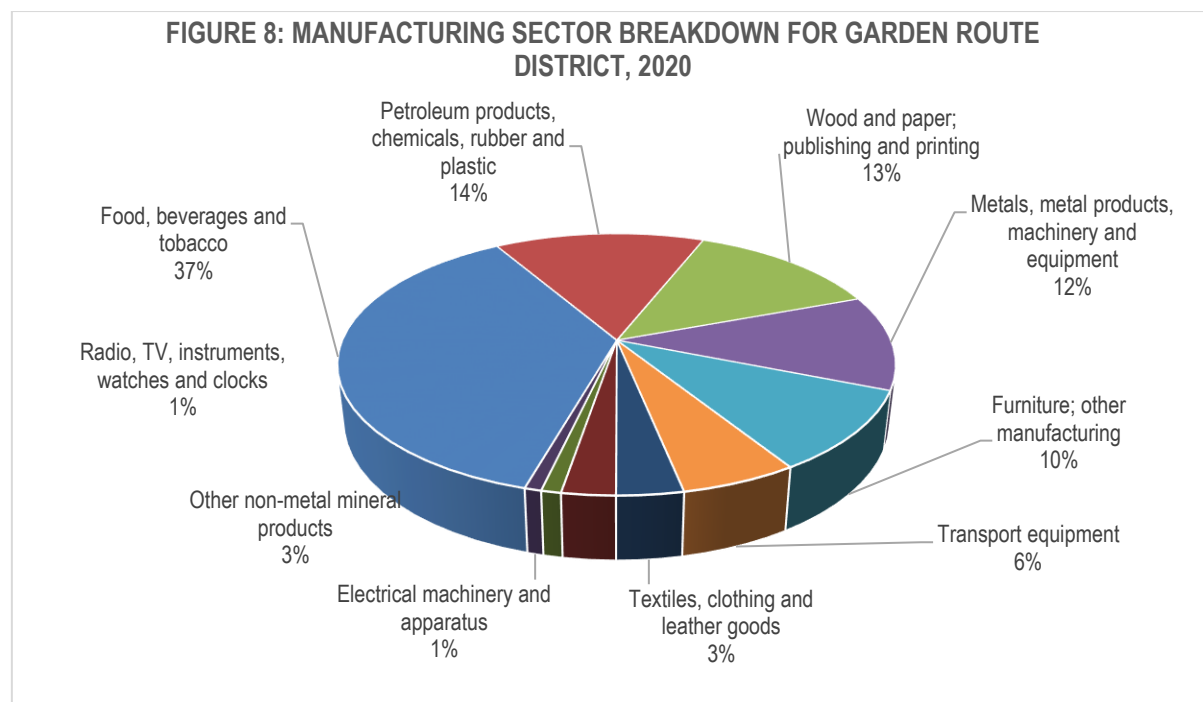
TABLE 4: SECTOR BREAKDOWN OF GDP, 2016 - 2020

Sector	VALUE 2016 (ZARm)	VALUE 2017 (ZARm)	VALUE 2018 (ZARm)	VALUE 2019 (ZARm)	VALUE 2020 (ZARm)	% Share. 2020	% Change, 2019 - 2020
Finance, insurance, real estate, and business services	10184.18	10655.68	11122.51	11666.96	11649.18	25.84%	-0.15%
Wholesale and retail trade, catering, and accommodation	7286.51	7821.46	8168.38	8599.83	8105.44	17.98%	-5.75%
Manufacturing	5855.40	6313.84	6469.53	6787.31	6653.62	14.76%	-1.97%
General government	4135.12	4417.26	4675.96	4868.44	5049.88	11.20%	3.73%
Transport, storage, and communication	3973.25	4286.63	4470.70	4656.74	4170.54	9.25%	-10.44%
Community, social and personal services	2683.23	2934.09	3079.73	3232.15	3193.07	7.08%	-1.21%
Agriculture, forestry, and fishing	2277.53	2497.75	2315.08	2015.23	2494.39	5.53%	23.78%
Construction	2674.93	2751.43	2815.11	2811.16	2242.51	4.97%	-20.23%
Electricity, gas, and water	1248.75	1323.31	1386.38	1455.36	1374.32	3.05%	-5.57%
Mining and quarrying	139.00	154.97	158.01	169.67	152.13	0.34%	-10.34%
Total	40457.89	43156.42	44661.38	46262.83	45085.08	100.00%	-2.55%

Source: Quantec, 2021

The figure below shows the contribution share of the Garden Route's manufacturing sub-sectors to the district's GDP for 2020. The figure shows that:

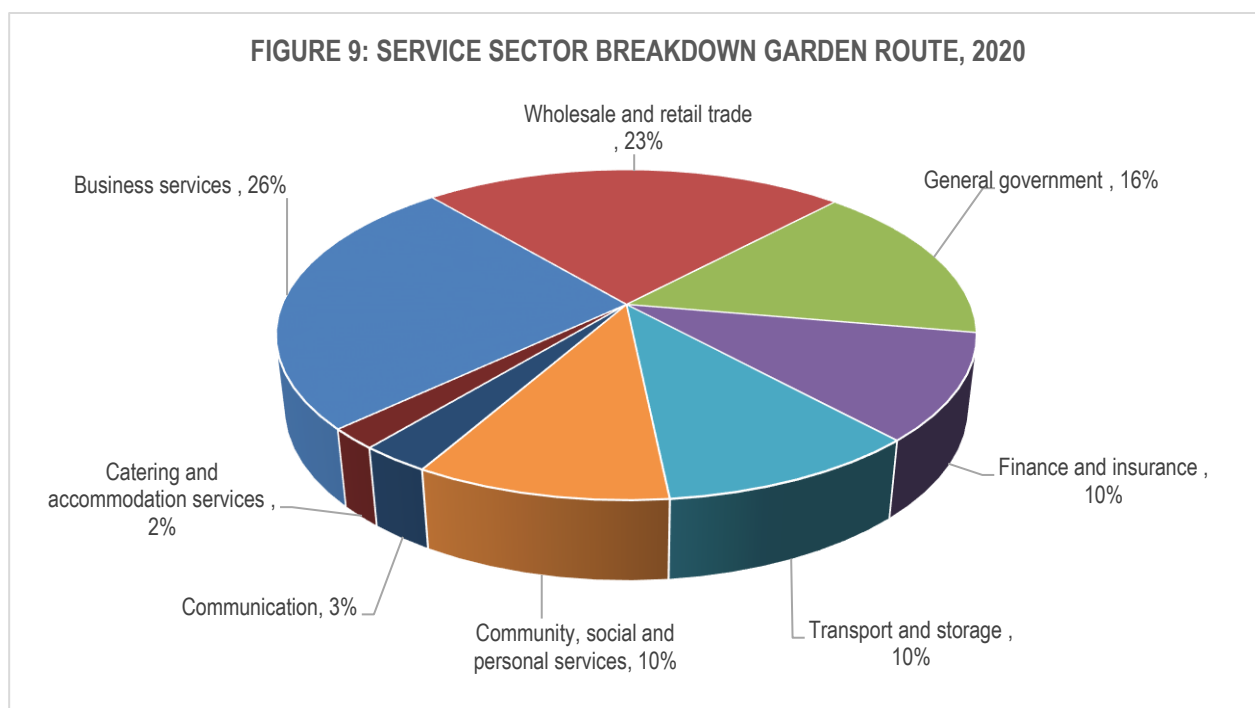
- The food and beverages and tobacco sub-sector was the largest contributor to the Garden Route's manufacturing sector accounting for 37%, followed by
- Petroleum products, chemicals, rubber and plastic sub-sector, accounting for 14%, and
- Wood, paper, publishing and printing sub-sector, accounting for 13%.



Source: Quantec, 2021

The figure below shows the contribution share of the Garden Route's services sub-sectors to the district's GDP for 2020. The figure shows that:

- Business services was the largest contributor to Garden Route's services sector, accounting for 26%; followed by
- Wholesale and retail trade, accounting for 23%; and
- General Government, accounting for 16%.

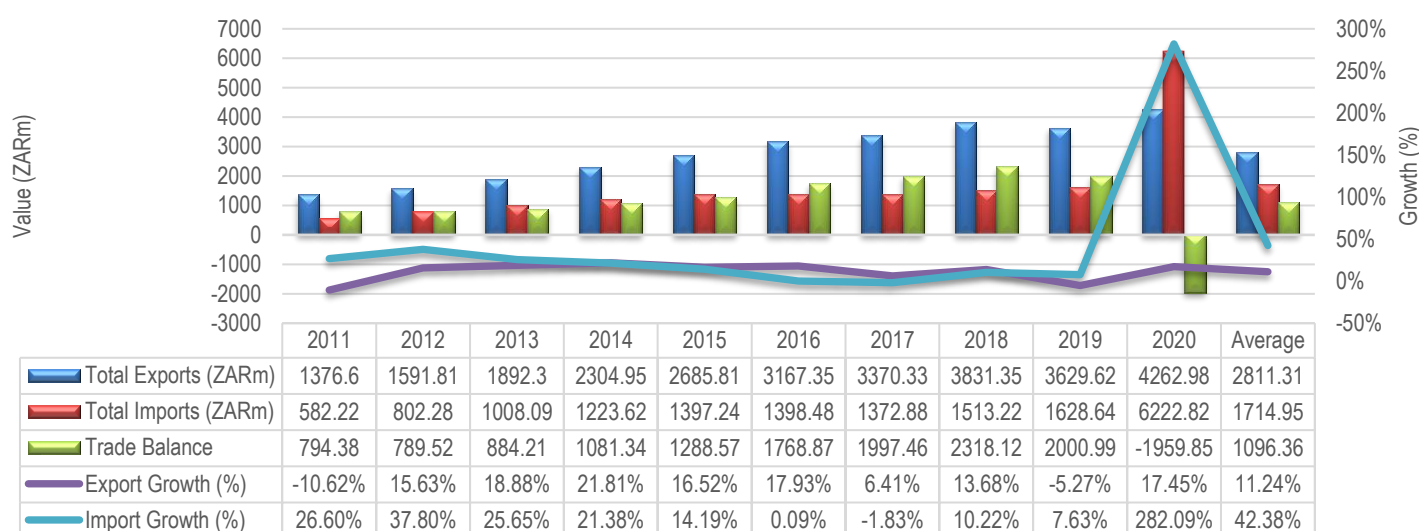


Source: Quantec, 2021

4. TRADE

In 2020, total exports from the Garden Route district increased by 17.45% to ZAR4.26bn in 2020 from a value of ZAR3.63bn in 2019. In contrast, imports increased by 282.09% to ZAR6.22bn in 2020 from a value of ZAR1.63bn in 2019. On average, the district maintained a positive trade balance of ZAR1.09bn over the period analysed, with the only exception occurring in 2020 where imports were ZAR1.95bn higher than exports.

FIGURE 10: GARDEN ROUTE DISTRICT, TRADE FLOWS, 2011 -2020



Source: Quantec, 2021

The top destination markets for exports from the Garden Route district in 2020 were the Netherlands (11.66%), the United States (8.52%), China (7.02%), and France (6.08%). In terms of the fastest growing export markets, Bangladesh had the highest growth of 168.83% from 2016 to 2020, followed by the UAE (74.51%), and China, which grew at an average annual rate of 40.95% over the period reviewed.

FIGURE 11: GARDEN ROUTE, TOP 10 EXPORT MARKETS, 2020

	Value (ZARm), 2020	% Share, 2020	Growth % (2016 - 2020)
Netherlands	496.99	11.66	31.77
United States	363.15	8.52	16.48
China	299.21	7.02	40.95
France	259.19	6.08	7.28
United Arab Emirates	226.08	5.3	74.51
Bangladesh	168.46	3.95	168.83
United Kingdom	145.15	3.4	3.27
Russia	144.6	3.39	17.78
Namibia	114.38	2.68	-5.67
Hong Kong	111.5	2.62	12.35
Total exports	4,262.98	100	10.04

Source: Quantec, 2021

Furthermore, India accounted for the largest share of Garden Route imports, accounting for 18.97% of total Garden Route imports in 2020. This was followed by Singapore (14.33%), China (12.92%), and Nigeria (11.38%). In 2020, imports from Nigeria increased from ZAR353,492 in 2019 to ZAR707.90m. This resulted in Nigeria claiming the highest average growth market of 41899% per annum from 2016 to 2020. Moreover, other high growth import markets were Singapore (7472.37%), Norway (5016.23%), and India, which grew at an average annual rate of 1082.34% over the period 2016 to 2020.

FIGURE 12: GARDEN ROUTE, TOP 10 IMPORT MARKETS, 2020

	Value (ZARm), 2020	% Share, 2020	Growth (%), 2016 - 2020
India	1,180.16	18.97	1,082.34
Singapore	891.72	14.33	7,472.37
China	803.85	12.92	38.29
Nigeria	707.9	11.38	41,899.94
Malaysia	632.79	10.17	507.72
United States	440.14	7.07	47.6
Norway	184.61	2.97	5,016.23
Netherlands	176.34	2.83	294.01
Korea	148.87	2.39	695.05
Marshall Islands	126.04	2.03	
Total Imports	6,222.82	100	59.64

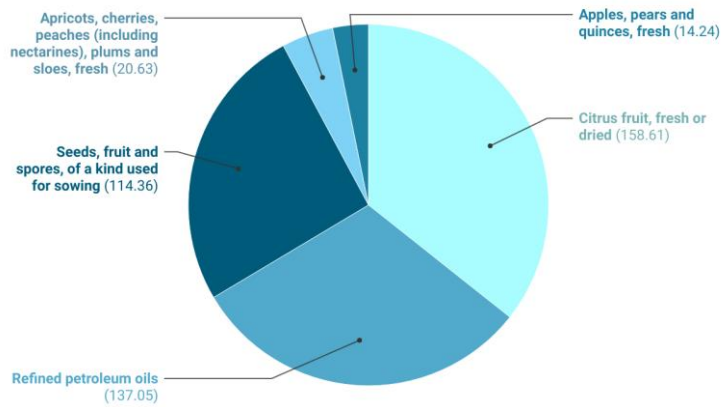
Source: Quantec, 2021

The top five traded products for the top five export markets for the Garden Route district in 2020 are shown below. The Netherlands was the largest export market for the Garden Route, with citrus fruit the largest exported product at a value of ZAR158.61m in 2020. Refined petroleum oil exports followed at a value of ZAR137.05m; followed by seeds used for sowing (ZAR114.36m); apricots, cherries, and peaches (ZAR20.63m). Apples, pears, and quinces were in fifth place with a value of ZAR14.24m in 2020.

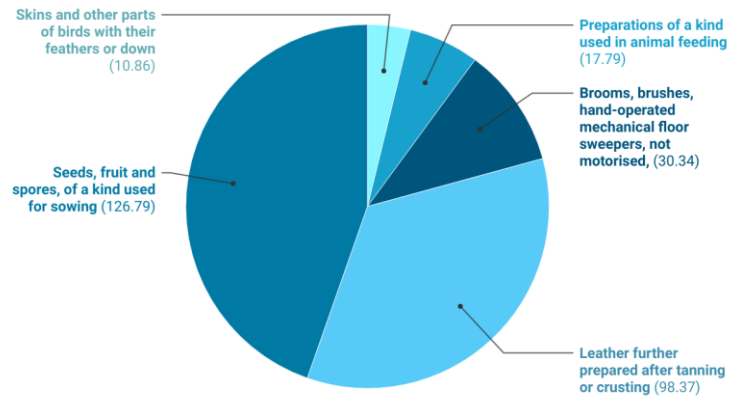
The United States was the second largest export destination for the Garden Route, with seeds used for sowing topping the list of exports at a value of ZAR126.97m in 2020. Prepared leather ranked in second place, with an export value of ZAR98.37m, followed by brooms and brushes (not motorised) at ZAR30.34m in 2020. The third largest market for Garden Route exports in 2020 was China, followed by France and the United Arab Emirates. The top products exported to China were citrus fruit, followed by skins and other parts of birds with their feathers or down (treated), and seeds for sowing.

FIGURE 13: GARDEN ROUTE, TOP 5 EXPORT PRODUCTS FOR THE TOP 5 EXPORT MARKETS, 2020

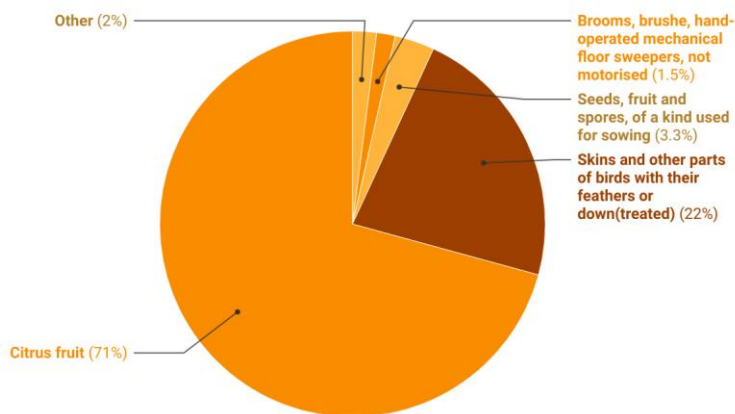
Top exports to Netherlands, (ZARm), 2020



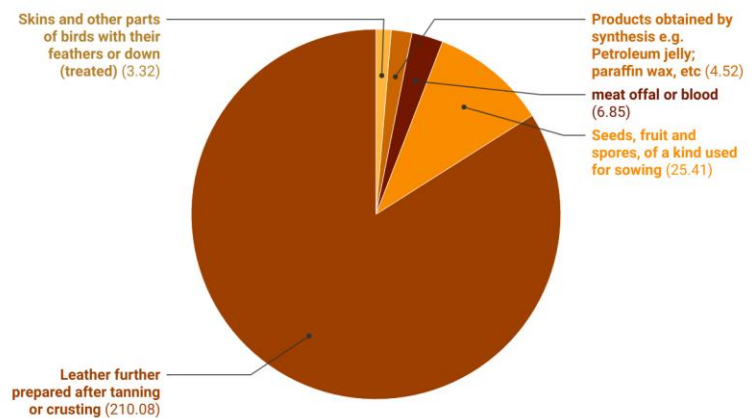
Top exports to USA, (ZARm), 2020



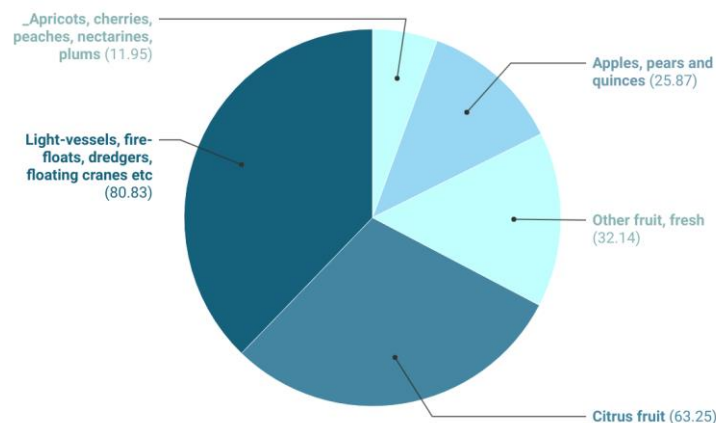
Top exports to China, (ZARm), 2020



Top exports to France, (ZARm), 2020



Top exports to UAE, (ZARm), 2020



Source: Quantec, 2021

The top exported products from the Garden Route district in 2020 were citrus fruit (ZAR1.05bn), seeds, fruit, and spores (ZAR481.09m), and apples, pears, and quinces (ZAR451.47m). The Garden Route exports 100% of the Western Cape's bird skins and feather exports. Refined petroleum oils grew by an average annual rate of 19,214% over the period 2016 to 2020, primarily due to the notable 949% rise in 2020.

FIGURE 14: GARDEN ROUTE, TOP 10 EXPORT PRODUCTS, 2020

	Value (ZARm), 2020	% Share, 2020	Growth (%), 2016-2020
Citrus fruit	1,049.2	24.61	12.03
Seeds, fruit and spores, of a kind used for sowing	481.09	11.29	19.93
Apples, pears and quinces, fresh	451.47	10.59	7,512.95
Leather further prepared after tanning or crusting	393.41	9.23	4.61
Skins and other parts of birds with their feathers or down (treated)	198.69	4.66	23.54
Refined petroleum oils	137.53	3.23	19,124.61
Insecticides, rodenticides, fungicides, herbicides etc	91.91	2.16	40.67
Light-vessels, fire-floats, dredgers, floating cranes etc	80.83	1.9	
Meat offal or blood	73.73	1.73	7.59
Motor cars, including station wagons and racing cars	61.82	1.45	25.27

Source: Quantec, 2021

The top imported products by the Garden Route district in 2020 were refined petroleum oil (ZAR3.06bn), crude oil (ZAR1.31bn), and warships and lifeboats (ZAR222.3m). Furthermore, aluminium, bars and rods experienced the highest average growth, reporting an average annual rate of 671.08% over the period 2016 to 2020. Helicopters, airplanes, and spacecrafts followed this, which grew at an average of 212.72% over the period under review.

FIGURE 15: GARDEN ROUTE, TOP 10 IMPORT PRODUCTS, 2020

	Value (ZARm), 2020	% Share, 2020	Growth (%), 2016-2020
Refined petroleum oil	3,064.06	49.24	
Crude oil	1,313.65	21.11	
Warships and lifeboats	222.3	3.57	
New pneumatic tyres	138.22	2.22	86.78
Helicopters, aeroplanes, spacecraft (including satellites)	112.67	1.81	212.72
Fish, frozen, excluding fish fillets	67.48	1.08	-2.04
Aircraft and spacecraft parts	60.87	0.98	28.76
Automatic data processing machines and units thereof	50.67	0.81	55.09
Chromium oxides and hydroxides	48.4	0.78	12.38
Aluminium bars, rods and profiles	46.33	0.74	671.08

Source: Quantec, 2021

5. INVESTMENT

The Garden Route district attracted seven FDI projects from seven multinational companies over the period 2003 to 2020. The cumulative value of this investment reached a total of ZAR21.69bn over this period and created 625 jobs in the region.

FIGURE 16: OVERVIEW OF FDI INTO GARDEN ROUTE, 2003 – 2020



Source: FDI Markets, 2021

The majority of FDI projects were invested into Mossel Bay, which attracted five out of the seven projects invested, while George and Hoogekraal each attracted one project over the period 2013 to 2020.

Furthermore, the energy sector attracted three out of the seven projects, while the agribusiness sector attracted two, and retail trade and consumer goods sectors each attracted one project over the period under review.

The United States was the top source market for FDI into the Garden route, with three projects invested. To this end, the largest FDI project emanated from the Norway, where Equinor invested one project into Mossel Bay in the energy sector, which reached a total capex of ZAR19.97bn over the period [JB1] January 2003 to December 2020.

TABLE 5: FDI into Garden Route, January 2003, and December 2020

Project date	Investing company	Source country	Destination city	Sector	Cluster	Jobs created	Capital investment (ZARm)
Nov 2019	Klinger South Africa	Austria	Mossel Bay	Industrial equipment	Energy	12	43.16
Jun 2018	Nestle South Africa	Switzerland	Mossel Bay	Food & Beverages	Agribusiness	1	18.70
May 2017	DuPont	United States	Hoogekraal	Food & Beverages	Agribusiness	55	166.87
Feb 2013	Builders Warehouse	United States	George	Consumer products	Retail Trade	119	41.72
Dec 2012	Hisense	China	Mossel Bay	Consumer electronics	Consumer Goods	30	54.66
Dec 2005	Pioneer Natural Resources	United States	Mossel Bay	Coal, oil & gas	Energy	214	1388.18
Mar 2004	Equinor (Statoil)	Norway	Mossel Bay	Coal, oil & gas	Energy	194	19973.97

Source: FDI Markets, 2021

5.1 SELECTED INITIATIVES IN THE GARDEN ROUTE DISTRICT

Key selected investment opportunities in Garden Route district, which were highlighted at the Investment Conference, are as follows:

- Agri-Processing & Timber Economy
- Tourism & Film Industry
- Oil & Gas, Energy and Water, Waste Management
- SMME Development
- Integrated Transport and Infrastructure
- Information, Communication and Technology (Smart City Concept)

- Real Estate & Human Settlements

For further details on these investment opportunities please follow the link below, under the tab investment opportunities:

- <https://invest.edendm.gov.za/>

6. COMPANIES

Some of the top companies in the Garden Route district are shown in the table below:

TABLE 6: TOP COMPANIES IN THE GARDEN ROUTE DISTRICT			
COMPANY NAME	TOWN	SECTOR	BUSINESS ACTIVITY
Alcare Aloe	Albertinia	Agribusiness	Aloe beauty/health products
Aloe Ferox Africa	Albertinia	Agribusiness	Aloe beauty/health products
Calitzdorp Spa	Calitzdorp	Tourism	Catering & Accommodation
Cape Pine	George	Manufacturing	Wood
Distell	George	Logistics	Logistics and Distribution
Datadot Technology South Africa (Pty) Ltd	George	Manufacturing	Vehicle Security
Fancourt	George	Tourism	Hospitality and Real Estate
Fechters Furniture Manufacturers	Knysna	Manufacturing	Furniture
Fuzzy Logic	George	Film and media	Multimedia
Garden Route Casino	Mossel Bay	Tourism	Catering & Accommodation
Golden Harvest FPM	George	Agribusiness	Food & Beverages
Klein Karoo International	Oudtshoorn	Agriculture	Food & Beverage
Lancewood	Wilderness	Agriculture	Dairy-processing
Merchants	George	Business Services	Business Process Outsourcing
Morning Milk	George	Agriculture	Food-processing
Mosstrich Pty Ltd	Mossel Bay	Agriculture	Food & Beverages
Nikwaflora	George	Agriculture	Foliage
Oakhurst Insurance Company Ltd	George	Services	Insurance
Petro-SA	Mossel Bay	Manufacturing	Oil and Gas
Rheebok Bricks	Mossel Bay	Manufacturing	Construction materials
Robbeberg Fine Foods	Plettenberg Bay	Agriculture	Food-processing
Robins Nest Interiors	Knysna	Manufacturing & Services	Interior design & production
SA Breweries	George	Agriculture	Viticulture
Safari Ostrich Farm	Knysna	Tourism	Catering & Accommodation
Specialised Solar Systems	George	Renewable Energy	Solar energy
Turnkey Water Solutions	Hessequa	Manufacturing	Water
Tradelink	George	Manufacturing	Clothing manufacturing
Travelstar	Knysna	Manufacturing	Motorhome design & vehicle conversion

Source: Garden Route District, 2020; Invest in George, 2019

7. TOURISM

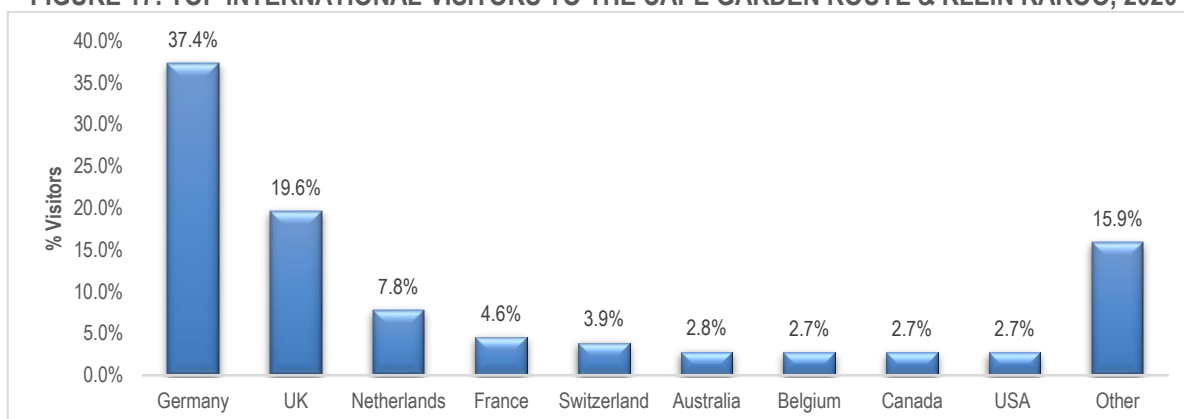
Participating tourism offices in the Cape Garden Route & Klein Karoo received a total of 5 156 responses to the regional visitor tracking survey in 2019. Participating offices included Oudtshoorn, Uniondale, Knysna, Wilderness, George, Plettenberg Bay, Calitzdorp, and Pacaltsdorp. The Pacaltsdorp Visitor Information Centre, however, has been converted into a community office since February 2019 and as such no longer collects tourist survey data.

The Cradle of Human Culture route, which includes two archaeological sites on the Garden Route: Blombosch Cave, and Pinnacle Point Site Complex, was launched in April 2019. The route, which also includes stops in Oudtshoorn, George, and Plettenberg Bay, offers an opportunity for the destination to appeal to a wider audience and create jobs in the industry. The project is a partnership with the Cradle of Humankind, a UNESCO World Heritage Site located in the Gauteng province and captures the archaeological and paleontological heritage routes with three anchor sites in the Western Cape.

7.1 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 historically 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.

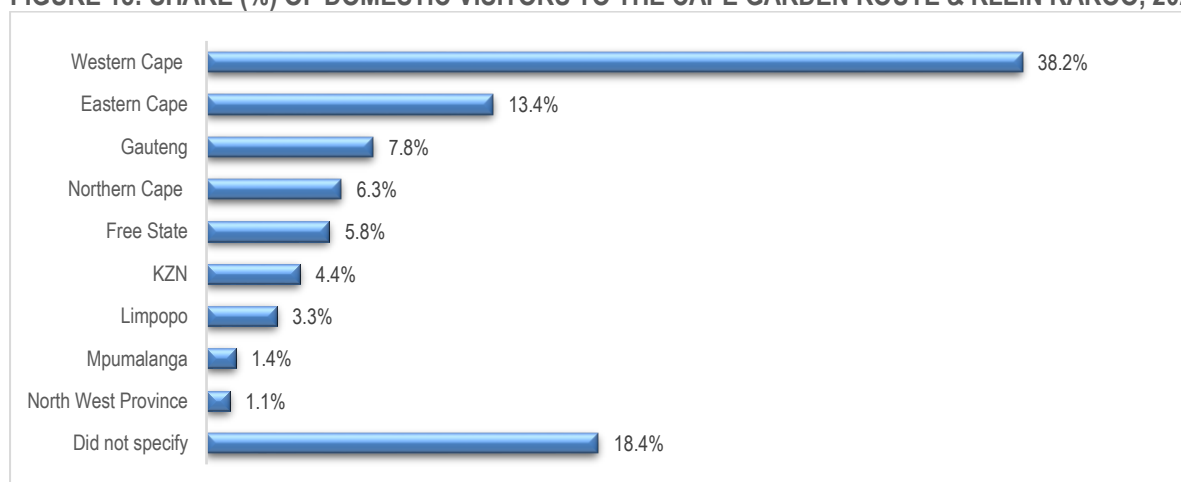
FIGURE 17: TOP INTERNATIONAL VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2020



Source: Cango Caves, SANParks, 2020

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.

FIGURE 18: SHARE (%) OF DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2020

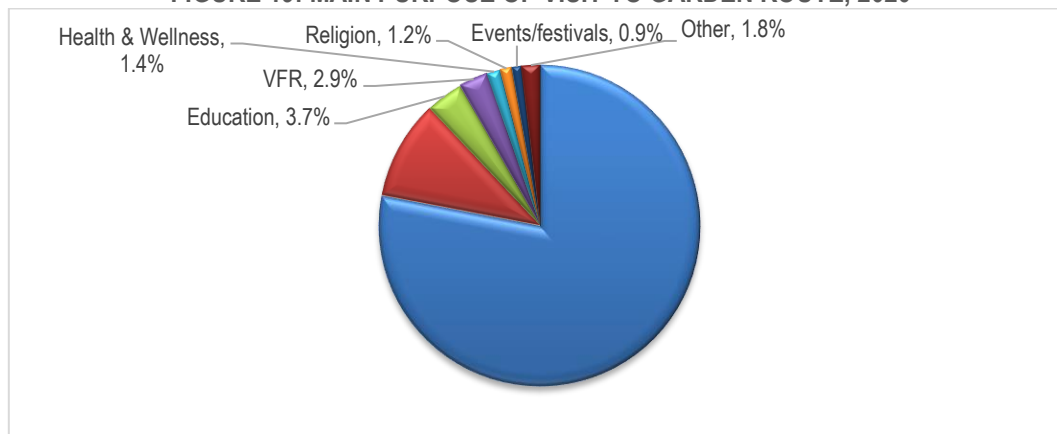


Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

7.2 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.

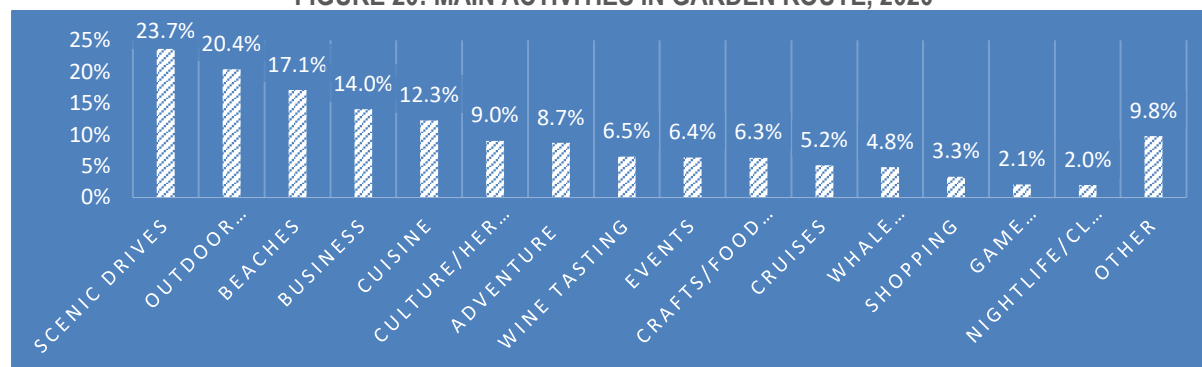
FIGURE 19: MAIN PURPOSE OF VISIT TO GARDEN ROUTE, 2020



Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

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.

FIGURE 20: MAIN ACTIVITIES IN GARDEN ROUTE, 2020

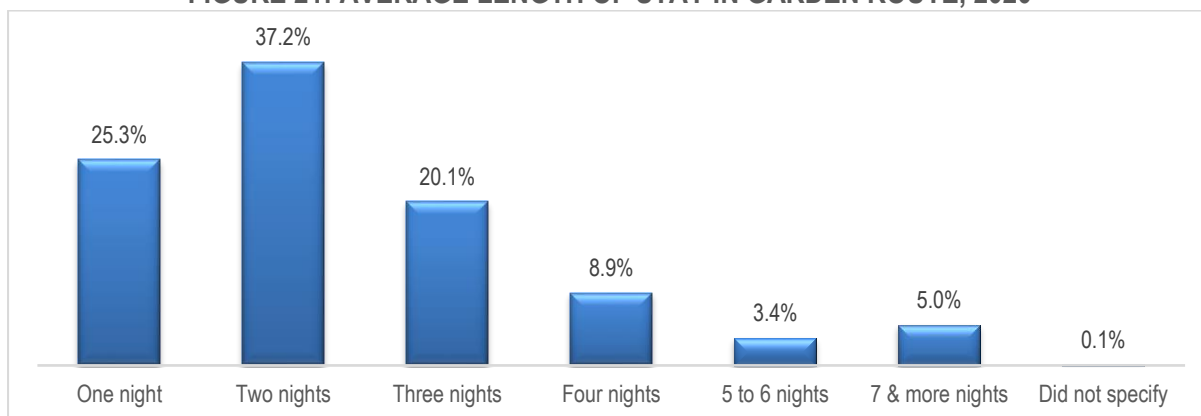


Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

7.3 OVERNIGHT STAYS

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. The majority of overnight visitors stayed for two nights (37,2%) and 25,3% of respondents indicated a stay of one night in the region.

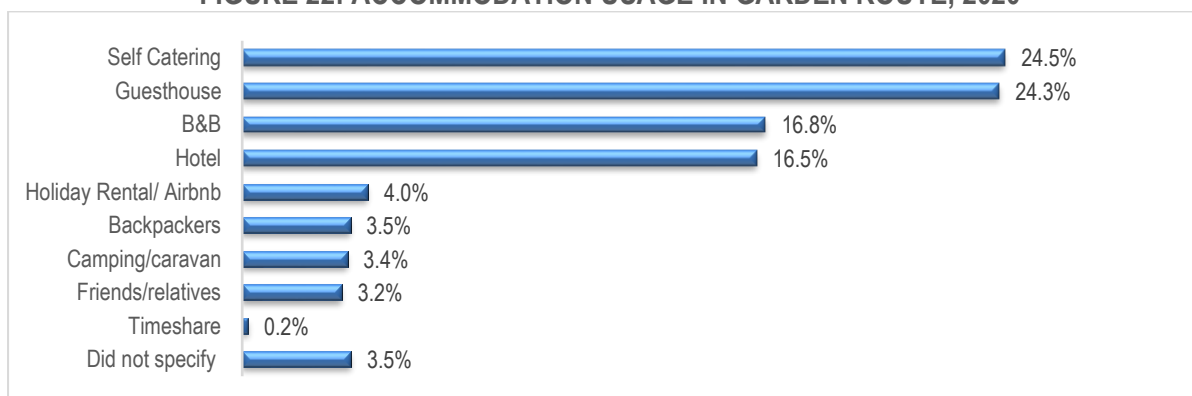
FIGURE 21: AVERAGE LENGTH OF STAY IN GARDEN ROUTE, 2020



Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

Approximately a quarter of respondents indicated their preferred accommodation type as self-catering, followed closely by guesthouses (24,3%), and B&B (16,8%).

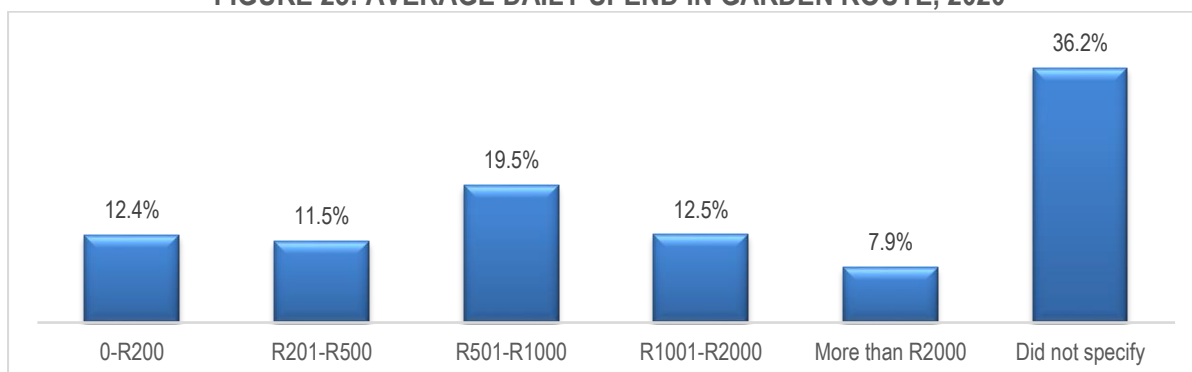
FIGURE 22: ACCOMMODATION USAGE IN GARDEN ROUTE, 2020



Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

Around 20% of respondents spent between R501 and R1000 daily, and 12,5% spent between R1001 and R2000 in the region.

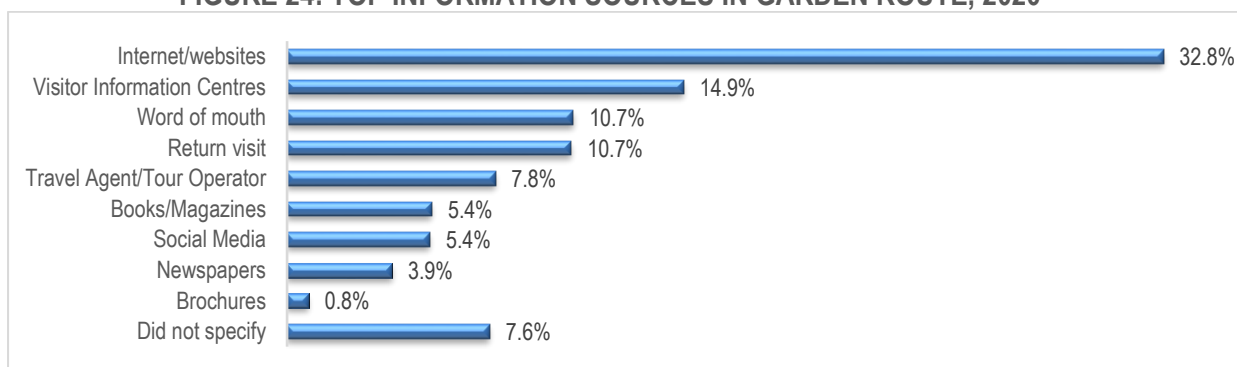
FIGURE 23: AVERAGE DAILY SPEND IN GARDEN ROUTE, 2020



Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

The internet (32,8%) and Visitor Information Centers (14,9%) were the most popular platforms and 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.

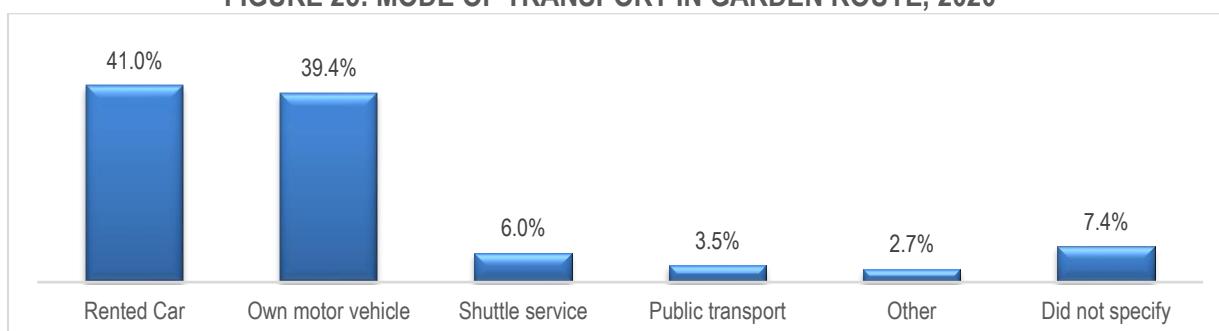
FIGURE 24: TOP INFORMATION SOURCES IN GARDEN ROUTE, 2020



Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

Two-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, minibus taxi, tour bus, and motorbike.

FIGURE 25: MODE OF TRANSPORT IN GARDEN ROUTE, 2020

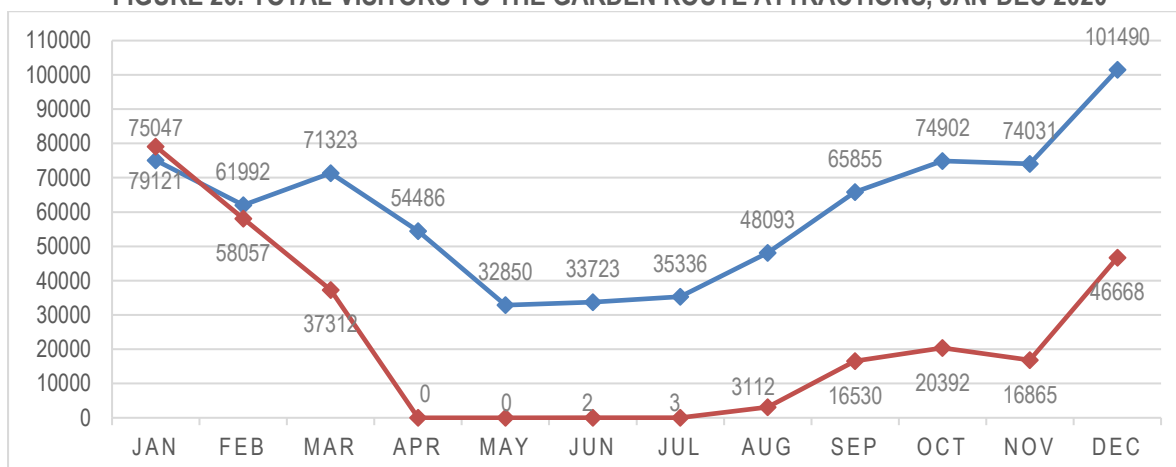


Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

7.3 CAPE GARDEN ROUTE AND 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 2020 (+5,4%), slowly decreasing in February 2020 (-6,3%) and finally plummeted in March 2020 (-47,7%) due to COVID-19 restrictions.

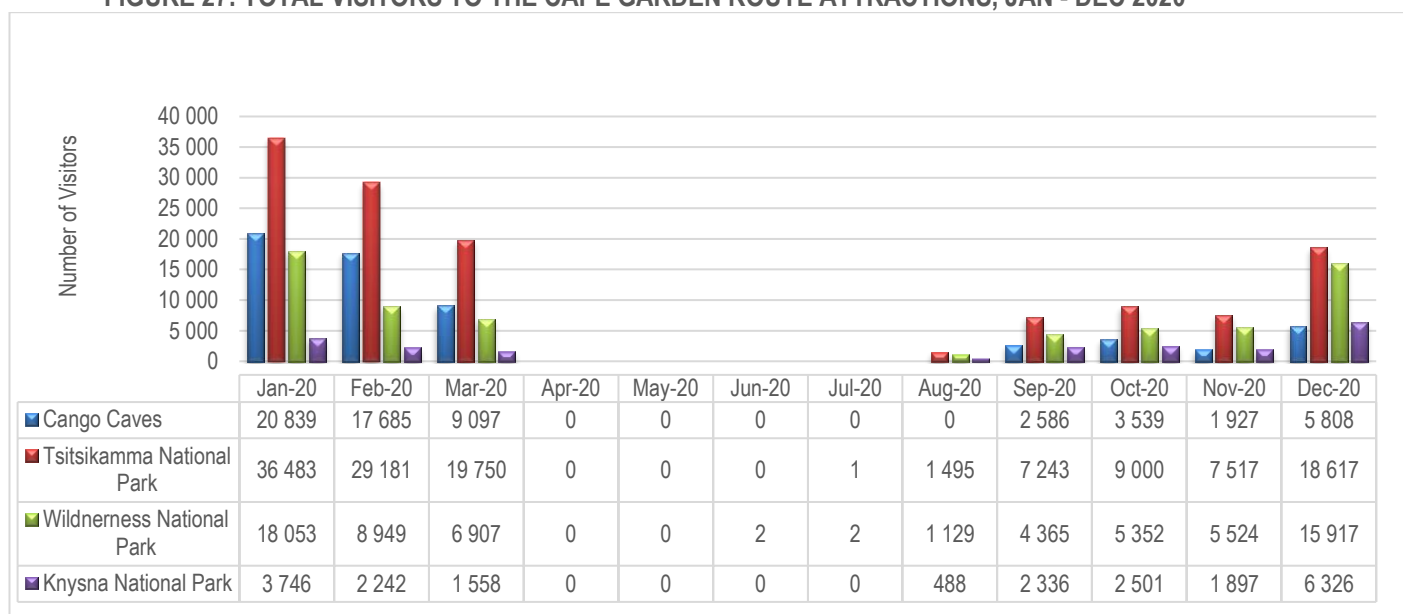
FIGURE 26: TOTAL VISITORS TO THE GARDEN ROUTE ATTRACTIONS, JAN-DEC 2020



Source: Wesgro Cape Garden Route & Klein Karoo Tourism Trends, 2020

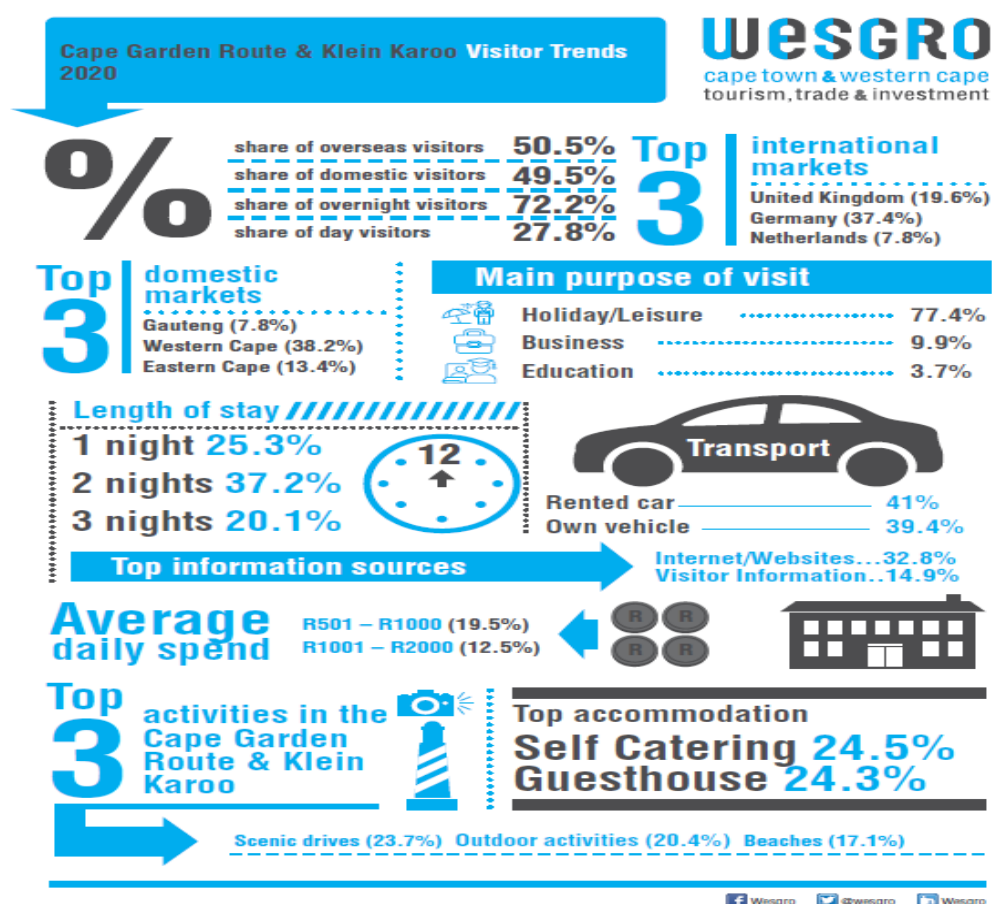
All attractions in the region were closed throughout quarter two and most of quarter three of 2020 due to the nationwide lockdown, which took effect on 26 March 2020. Recovery was slow over the remaining months reaching 46 668 visitors in December 2020, a 54% decline from the previous year.

FIGURE 27: TOTAL VISITORS TO THE CAPE GARDEN ROUTE ATTRACTIONS, JAN - DEC 2020



Source: SANParks 2020, Cango Caves 2020

FIGURE 27: INFOGRAPHIC: Cape Garden Route and Klein Karoo Visitor trends, 2020



8. FILM



Whether you are looking for white beaches, rugged rocky coastlines, lagoons, lakes, mystic forests, mountains, vibrant pastures, or even semi-arid desert, the Garden Route has it all. World-renowned as a tourist destination with a Mediterranean climate, the region is the ideal location for your next production. It has an abundance of diverse, scenic landscapes in close geographic proximity, and well-developed infrastructure.

KEY INFORMATION

There is a regional process working towards establishing the Garden Route and Klein Karoo Film Office. Until the film office is in place, producers can contact info@grkk-filmoffice.co.za which is under the care of the Garden Route Regional Municipality. Alternatively, producers can contact the office for assistance in obtaining the necessary permits. The Garden Route and Klein Karoo Film Office is working with the Garden Route district Municipality to obtain permits.

Permits: During productions, when shooting on public property, or if the shoot has an impact on others or the environment, one must obtain a permit. This includes:

- Commercials
- If filming has an impact on traffic/pedestrians
- If planning to use dollies, wires, tripods, generators etc.
- If planning to use public spaces in a different/special way

For access to Cape Nature and SANParks, the normal processes still have to be followed. There are more options available though, e.g., a larger variety of beaches than in some cities.

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TABLE 7: FILMS SHOT ON LOCATION	
Films	Born to Win, Klein Karoo, Knysna, Faan se Trein, Fiela se Kind, The Breed, Lord of War
TV Series	Bear Grylls: Mission Survive S2, The Bachelor Finland S1 and S2, Black Sails, Crusoe

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