



Western Cape Regional Tourism Visitor Trends

January – June 2023

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1. Executive summary

- Visitors to 37 participating attractions across the six regions of the Western Cape totaled 3,499,507 between January and June 2023, representing a 47.6% year-on-year growth in the number of visitors when compared to Jan-Jun 2022. This reflects a recovery rate of 80.7% compared to the same period in 2019.
- During the first half of 2023, the majority of visitors (85.5%) to the Western Cape were from the domestic market. Among these visitors, 86.7% were from the Western Cape itself, indicating that locals tend to travel mostly within their own province. A small percentage of visitors (3.5%) came from Gauteng.
- The overseas market accounted for 14.5% of visitors to the province during this period, with the greatest numbers coming from Germany (38.5%), the UK (15.5%) and France (9.6%).
- Gen X, Millennials, and Baby Boomers were the leading groups visiting the Western Cape. They travelled in pairs or on their own, with 67.0% of the travellers doing so for leisure/holiday purposes.
- More than half of the visitors to the province chose to stay overnight, while 49.2% were day visitors. On average, visitors stayed for 7 or more nights, with 28.0% indicating a stay of up to seven to ten days. Accommodation preferences leaned towards self-catering establishments and guesthouses as the most popular choices.
- More than 70% of visitors to the province expressed their preference for public transport while travelling. The top three activities that visitors enjoyed the most were trying out local cuisine, visiting cultural and heritage sites, and exploring scenic drives. These findings suggest that visitors to the province have a keen interest in experiencing the local culture and scenery, and that public transportation is an excellent option for them to do so.
- Based on our data, it appears that 17.0% of the visitors who participated in the survey allocated more than R2000 towards their accommodation expenses during their stay. Meanwhile, 32.4% of visitors spent between R1,001 and R2,000, and approximately 25.5% of visitors spent an average of more than R2,000 per day. These findings suggest that there is a significant range in the amount that visitors are willing to spend on their accommodation and daily expenses while visiting.
- Visitor information centres, word of mouth, and return visits were the top sources that attracted visitors to the Western Cape. Among these information sources, 43% of visitors listed visitor information centres as their leading source of travel to the province. This suggests that these information centres successfully promoted the Western Cape to visitors.
- After examining the performance of the Western Cape region, it was found that the Weskus region mainly attracted overseas day visitors who came to the area for leisure and holiday purposes. These visitors likely came to the region to enjoy the beautiful natural scenery that the Weskus has to offer. In contrast, the Winelands, Overberg, Garden Route and Klein Karoo regions primarily attracted domestic day-trippers who came to the areas to enjoy leisure and holiday activities. It is worth noting that scenic drives were the most popular activity across all regions, which highlights the importance of the stunning landscapes in attracting visitors to the Western Cape.

2. Methodology and sample size

This report provides an overview of the tourism trends and patterns in the Western Cape region. 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: Visitor: Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited.

Between **January to June 2023**, a total of 5,325 responses to the regional visitor tracking surveys were received from the respective tourism offices in the Western Cape. The participating tourism offices were:

Table 1: Total number of responses from January to June 2023

Region	Number of Surveys
Garden Route & Klein Karoo	159
Overberg	3,009
Weskus	1,335
Winelands	822



Source: Wesgro, 2023

3. Western Cape attractions

- The number of visitors to attractions in the Western Cape increased markedly in the first six months of 2023. The 37 participating Western Cape attractions recorded a total of 3,499,507 visitors between January and June 2023. This represented an increase of 47.6% in visitor arrivals when compared to the same period in 2022 (2,370,414) and a recovery rate of 80.7% compared to the same period in 2019 (4,337,372).
- The following are the top 12 attractions, which have consistently maintained their popularity and witnessed a remarkable recovery between January and June 2023 that surpassed pre-pandemic levels. The data reveals that despite challenging circumstances, these attractions have managed to attract a significant number of visitors, resulting in a noteworthy revival of the industry.

- | | |
|---|---|
| 1. Keurbooms River Nature Reserve (1618.7%) | 7. Goukamma Nature Reserve (120.2%) |
| 2. Robberg Nature Reserve (210.5%) | 8. Limietberg Nature Reserve (117.5%) |
| 3. Swartberg Nature Reserve (208.3%) | 9. The Harold Porter National Botanical Garden (116.3%) |
| 4. Anysberg Nature Reserve (164.5%) | 10. Knysna National Park (111.1%) |
| 5. Kogelberg Nature Reserve (135.7%) | 11. Vrolijkheid Nature Reserve (108.7%) |
| 6. Khwattu (122.1%) | 12. De Mond Nature Reserve (100.7%) |

****Attractions that have fully recovered between Jan-Jun 2023 compared to the same period in 2019.***

3. Western Cape attractions

Table 3: Western Cape's attractions: half-year performance, Jan-Jun 2023

Overberg	Jan-Jun 2022/2023 % Change	Jan-Jun 2019/2023 % Recovery
1. Kogelberg Nature Reserve	-43.9%	135.7%
2. Harold Porter National Botanical Garden	-1.5%	116.3%
3. De Mond Nature Reserve	20.8%	100.7%
4. Cape Agulhas Lighthouse	3.3%	73.1%
5. Bontebok National Park	-13.0%	64.1%
6. Agulhas National Park	-26.7%	56.9%
7. De Hoop Nature Reserve	-19.7%	53.7%
8. Stony Point	-59.1%	34.3%
9. Shipwreck Museum	-37.1%	29.7%
Cape Winelands		
10. Avalon Springs (Day Visitors)	-56.9%	43.7%
11. Protea Tractor Trip	-28.4%	81.9%
12. Birds Paradise	-14.3%	60.5%
13. Viljoensdrift River Cruise	-8.6%	87.9%
14. Assegaaibosch Nature Reserve	-26.8%	25.5%
15. Hottentots Holland Nature Reserve	-14.4%	65.8%
16. Jonkershoek Nature Reserve	-67.2%	71.6%
17. Limietberg Nature Reserve	32.7%	117.5%
18. Vrolijkheid Nature Reserve	15.7%	108.7%
Cape Town		
19. Kirstenbosch	10.7%	70.1%
20. Table Mountain Aerial Cableway	56.5%	83.8%
21. Table Mountain National Park	59.6%	81.0%
22. Table Mountain National Park: Boulders	84.7%	84.3%
23. Table Mountain National Park: Cape of Good Hope	84.0%	81.2%
24. Robben Island	78.5%	75.4%

Weskus		
25. West Coast National Park	-22.6%	49.7%
26. Khwattu	30.8%	122.1%
Cape Karoo		
27. Karoo National Park	-18.4%	75.2%
28. Anysberg Nature Reserve	-2.5%	164.5%
29. Gamkaberg Nature Reserve	-38.1%	59.3%
30. Swartberg Nature Reserve	108.3%	208.3%
Garden Route and Klein Karoo		
31. Cango Caves	74.1%	71.9%
32. Tsitsikamma National Park	41.0%	56.7%
33. Wilderness National Park	-2.7%	85.5%
34. Knysna National Park	-5.8%	111.1%
35. Goukamma Nature Reserve	-13.8%	120.2%
36. Keurbooms River Nature Reserve	30.0%	1618.7%
37. Robberg Nature Reserve	136.5%	210.5%

Data Source: Local Tourism Offices (LTOs) & Attractions, 2023

3. Western Cape attractions

Figure 1: Overberg’s half-year performance, Jan-Jun 2023

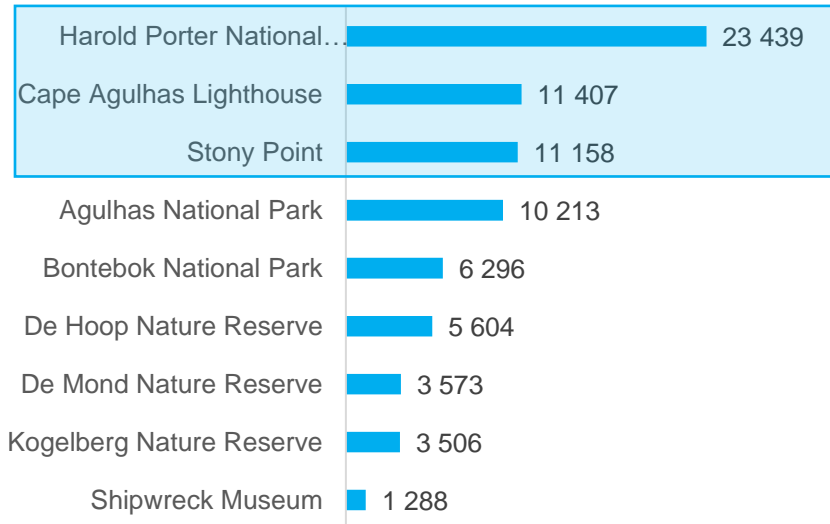
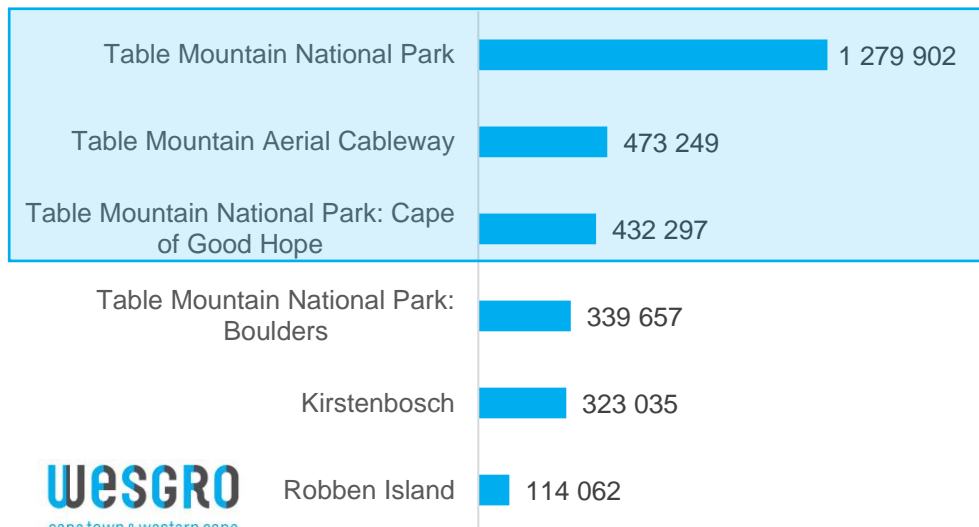
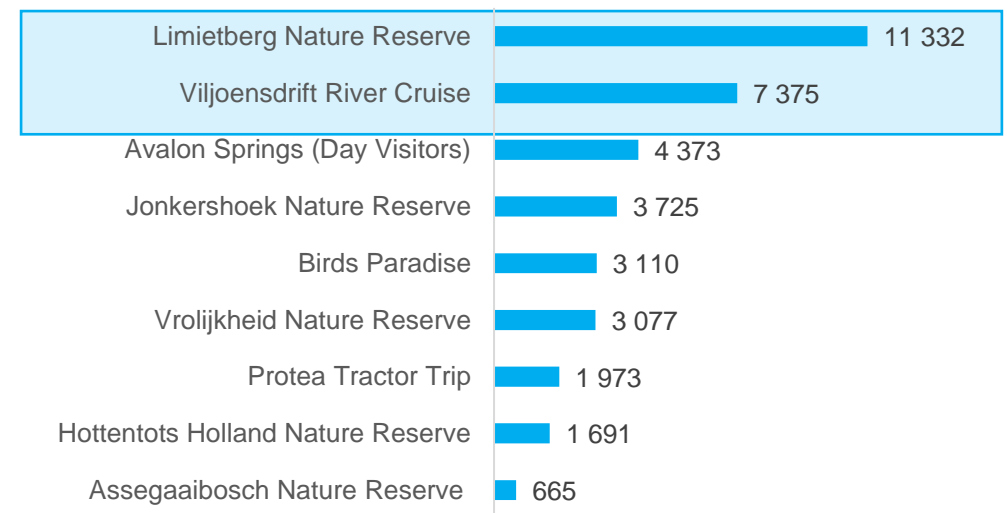


Figure 2: Cape Town’s half-year performance, Jan-Jun 2023



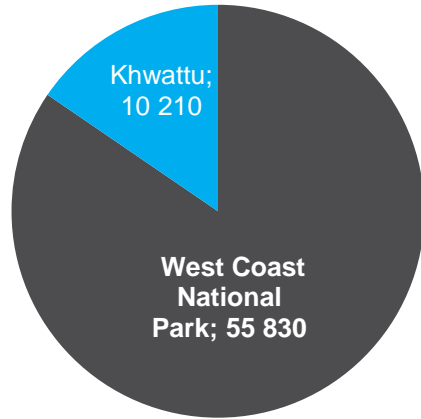
- The Western Cape is a beautiful province in South Africa that has many attractions worth visiting. The following are the attractions that received the most visitors between Jan-Jun 2023 per region, as seen in Figures 1-6.
- The data shows that Harold Porter National Park Botanical Garden, Cape Agulhas Lighthouse, and Stony Point were the most popular attractions in the **Overberg region** during Jan-Jun 2023. In **Cape Town**, the top attractions were Table Mountain National Park, Table Mountain Aerial Cableway, and Table Mountain National Park: Cape of Good Hope. While in the **Cape Winelands**, the Limietberg Nature Reserve and Viljoensdrift Nature Reserve were the top two attractions that received the most visitors during Jan-Jun 2023.

Figure 3: Cape Winelands’ half-year performance, Jan-Jun 2023



3. Western Cape attractions

Figure 4: Weskus' half-year performance, Jan-Jun 2023



- Furthermore, the data shows that the West Coast National Park was the most popular attraction in the **Weskus** during Jan-Jun 2023. In the **Garden Route and Klein Karoo**, the top attractions were the Tsitiskamma National Park and the Cango Caves. Lastly, in the **Cape Karoo**, the Karoo National Park was the main attraction for visitors during Jan-Jun 2023.

Figure 5: Garden Route and Klein Karoo's half-year performance, Jan-Jun 2023

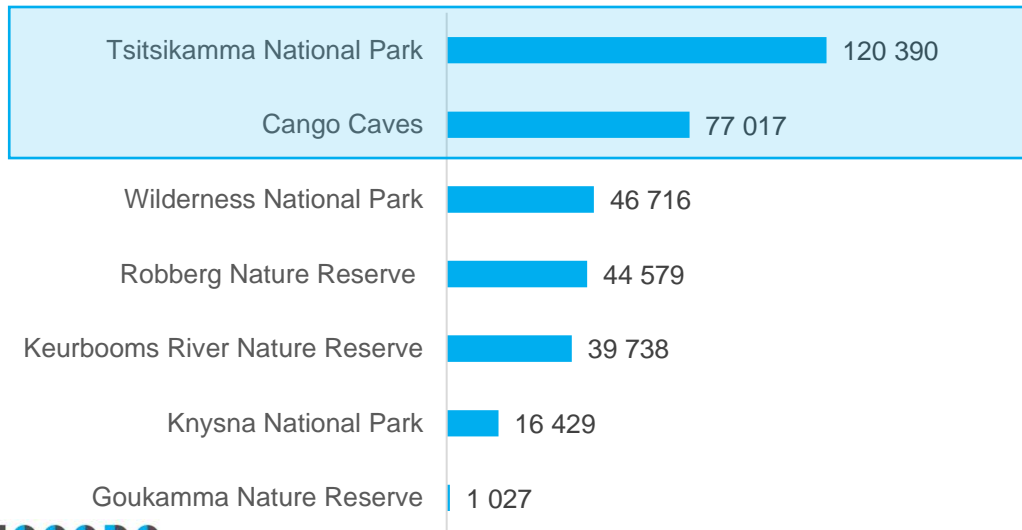
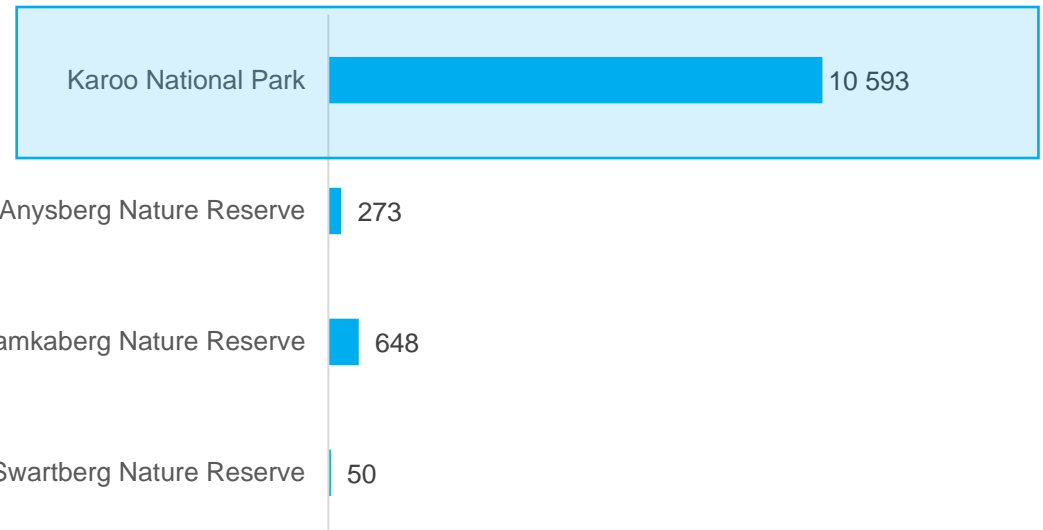


Figure 6: Cape Karoo's attractions half-year performance, Jan-Jun 2023



An aerial photograph of the Western Cape coastline, showing a range of mountains and a large body of water. The mountains are in shades of blue and green, and the water is a deep blue. The sky is a pale, hazy blue.

Western Cape visitor trends & patterns

Wesgro primary research: Regional visitor tracking surveys

4. Visitor trends & patterns

4.1 Origin of visitors

- The domestic market accounted for the largest share of visitors (85.5%) to the Western Cape between January and June 2023, whereas 14.5% of respondents were overseas travellers. This can be seen in Figure 7.
- Figure 8 demonstrates that most of the international travellers to the Western Cape originated from Germany (38.5%). This was followed by visitors from the UK (15.5%), and those from France which accounted for 9.6% of the visitors.
- Looking at the different provinces as source markets, Figure 9 shows that the largest share of domestic travellers (86.3%) were from the Western Cape, which confirms the observation that locals enjoy the diversity of tourism offerings in the province. Gauteng and KwaZulu-Natal ranked as the other leading sources of provincial visitors to the Western Cape.

Figure 7: % Share of overseas and domestic visitors to the Western Cape, Jan-Jun 2023

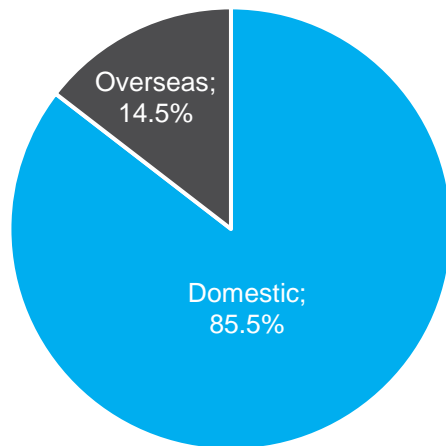


Figure 8: % Top international visitors to the Western Cape, Jan-Jun 2023

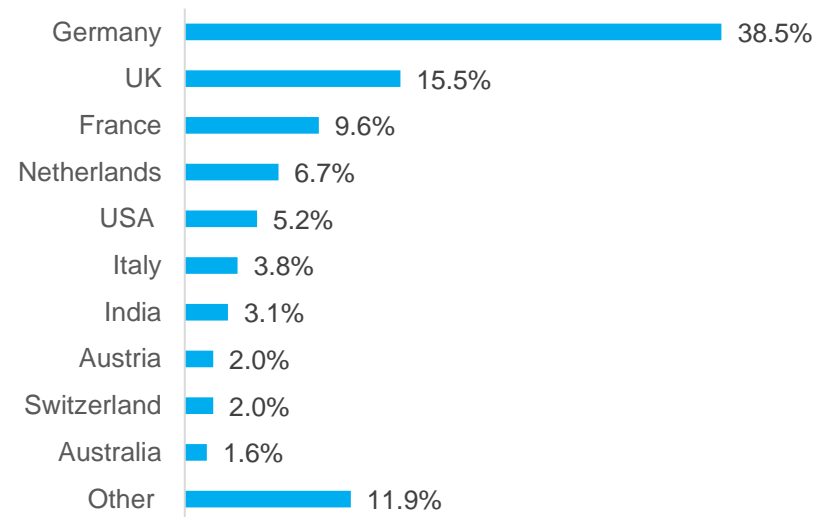
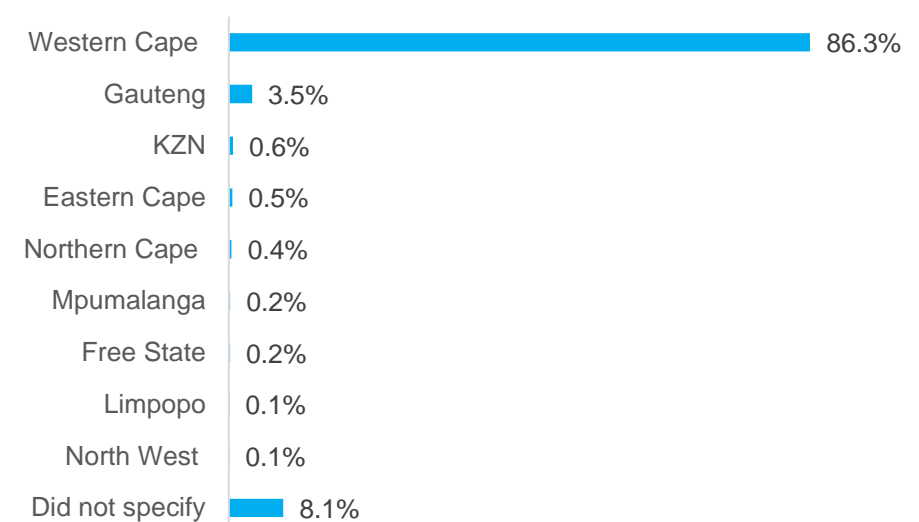
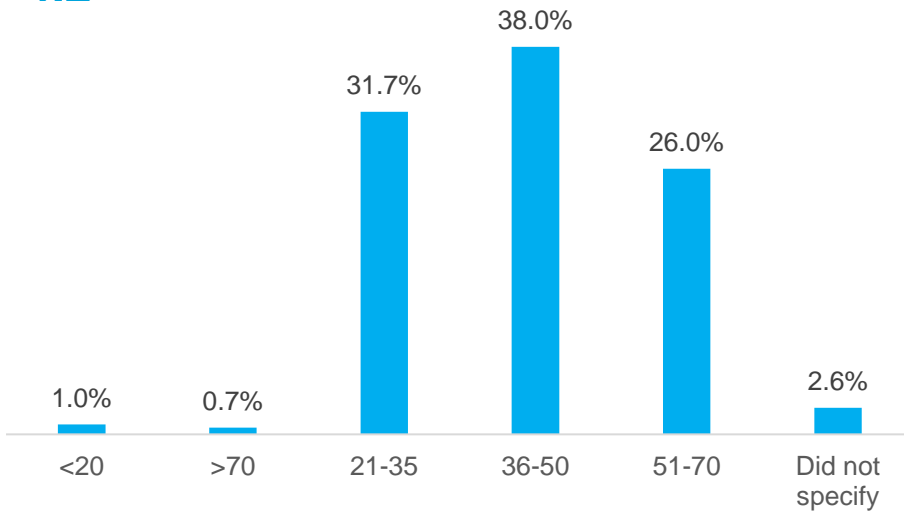


Figure 9: % Share of domestic visitors to the Western Cape, Jan-Jun 2023

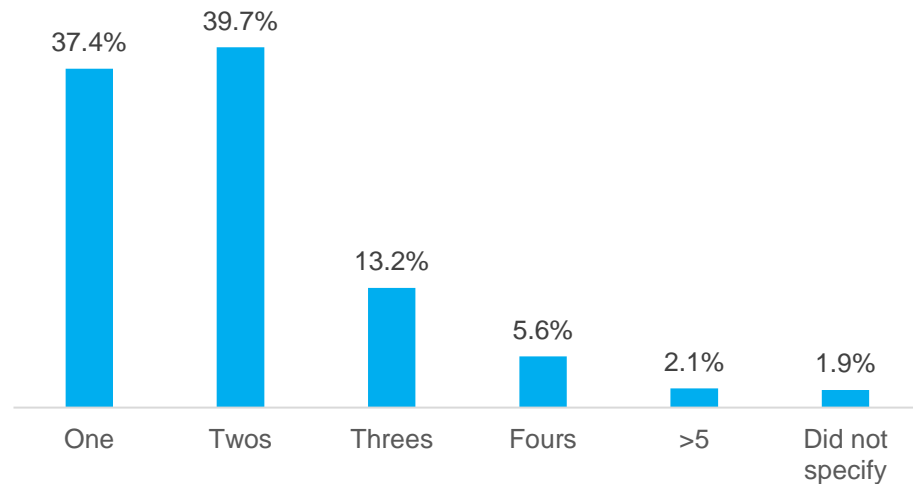


4. Visitor trends & patterns

4.2 Figure 10: Age profile of visitors

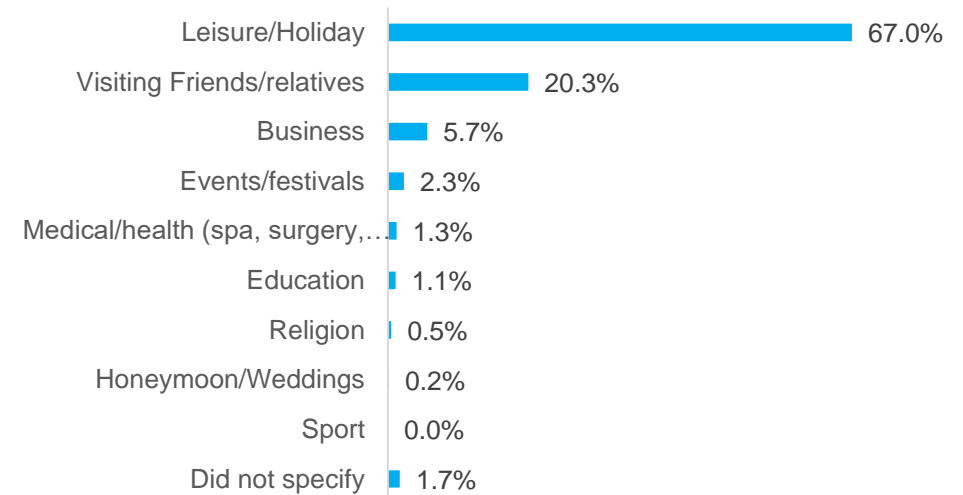


4.3 Figure 11: Travel group size



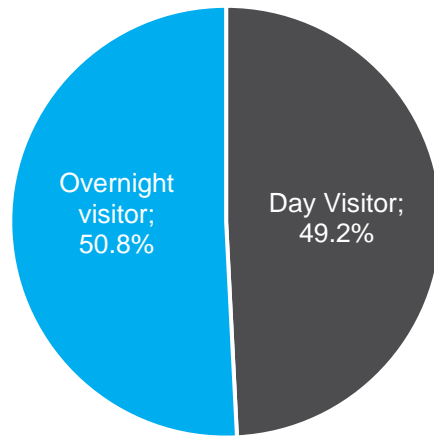
- Figure 10 shows that most visitors to the Western Cape were in the age groups of 36—50 and 21—35 years.
- The largest proportion of respondents (39.7%) travelled to the province in pairs, followed by 37.4% who were solo travellers. This can be seen in Figure 11.
- The majority of the visitors (67.0%) travelled to the Western Cape primarily for leisure/holiday and 20.3% visited friends and relatives, as shown in Figure 12. Some came for business (5.7%) and events/festivals (2.3%), whereas a small percentage visited for purposes of medical/health and education.

4.4 Figure 12: Purpose of visit



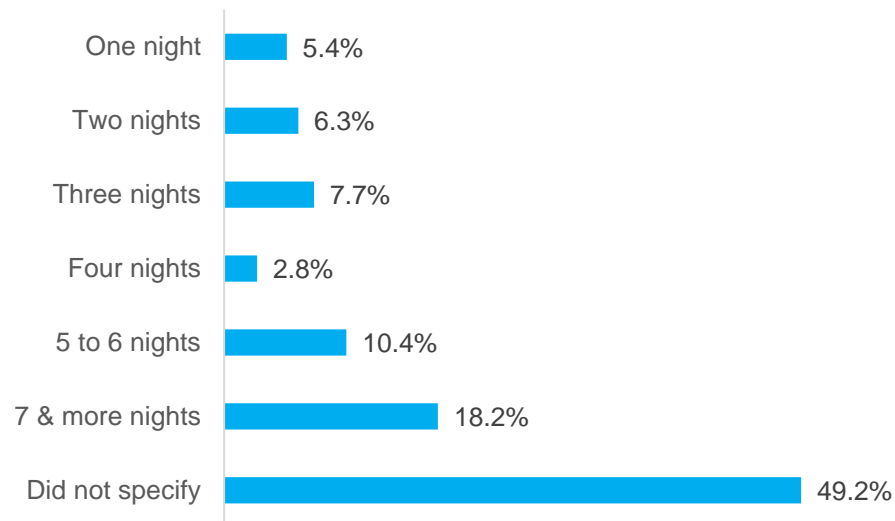
4. Visitor trends & patterns

4.5 Figure 13: Overnight and day visitors to the Western Cape

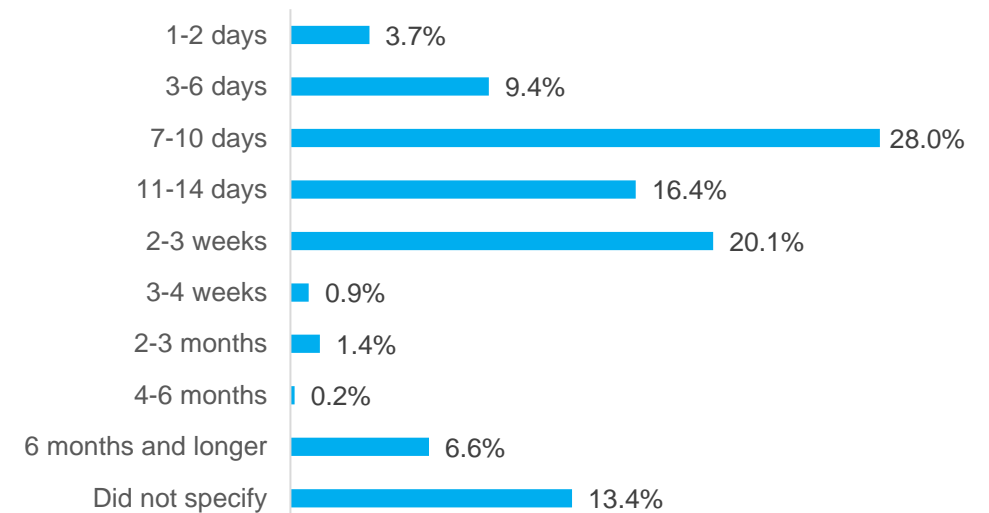


- Length of stay can play a major role in influencing individuals' willingness to spend more or increase total expenditure when travelling. As a result, this can potentially increase the demand for tourism-related services, which has a direct impact on the employment levels and economy of a region or destination.
- Between January and June 2023, half of the visitors (50.8%) stayed overnight in the Western Cape and 49.2% took day trips, as can be seen in Figure 13.
- Figures 14 and 15 show that during this period, those who indicated to have stayed overnight in the province stayed 7 or more nights (18.2% of visitors) and 28.0% stayed for seven to ten days.

4.6 Figure 14: Overnight in the Western Cape



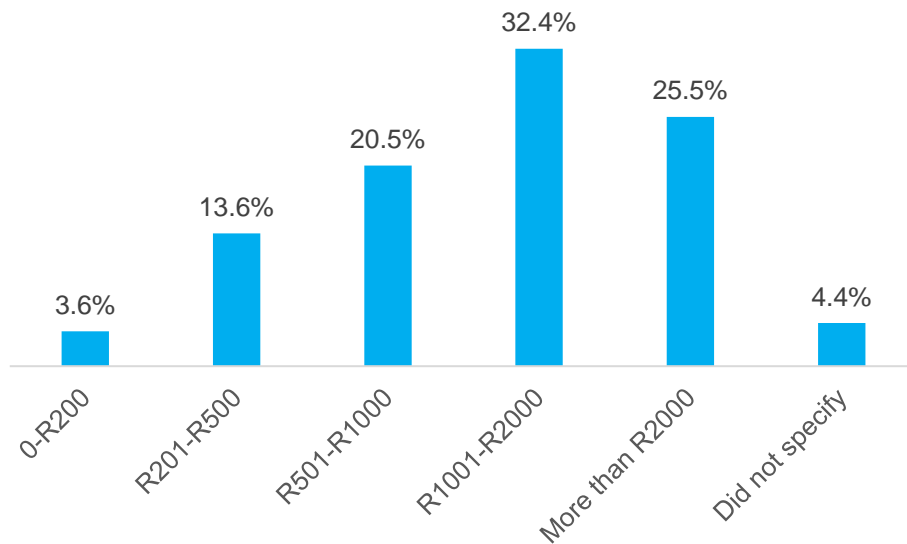
4.7 Figure 15: Average length of stay in the Western Cape



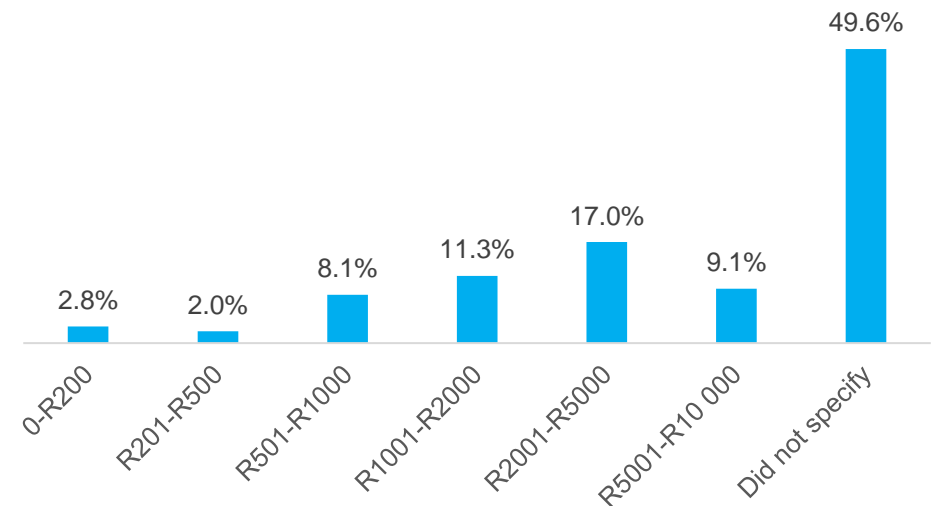
4. Visitor trends & patterns

- More than 32% of visitors spent on average R1001-R2000 daily, as shown in Figure 16. This was followed by 25.5% of visitors who indicated an average expenditure of more than R2000 and 20.5% who spent between R502 and R1000 daily.
- Regarding average spend on accommodation, 17% of visitors spent between R2001 and R5000 on accommodation during their overnight stay in the Western Cape (Figure 17). However, a high percentage of visitors - close to 50% - did not indicate their average spend on accommodation.
- As previously mentioned, length of stay can influence visitors' willingness to spend more when visiting a destination. Based on the survey, 18.2% of visitors stayed for 7 or more nights and seven to ten days (20.8%), which influenced the higher average daily spending and accommodation expenses during visitors' stay in the province.

4.8 Figure 16: Average daily spend



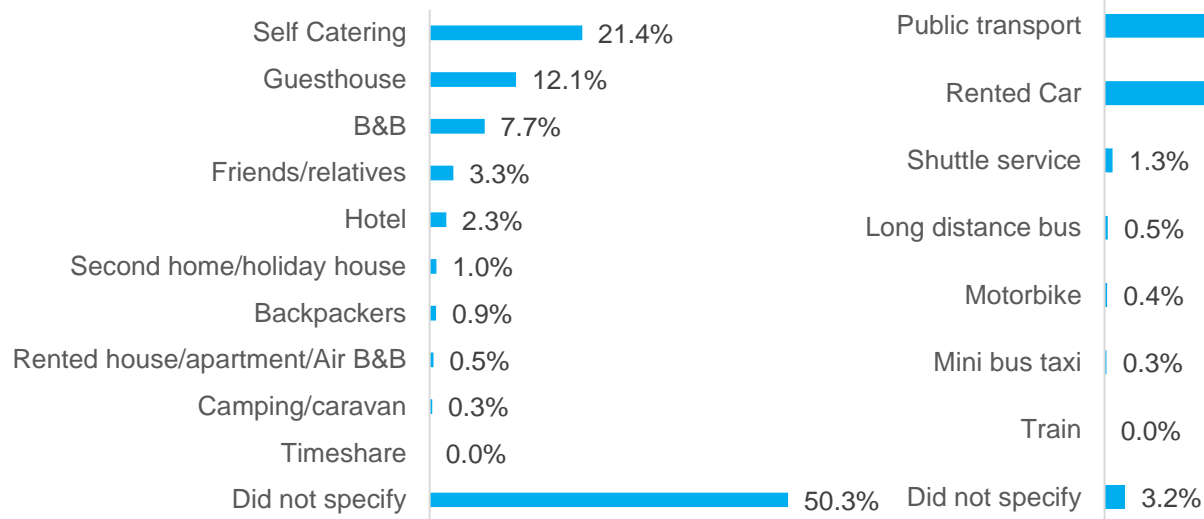
4.9 Figure 17: Average spend on accommodation



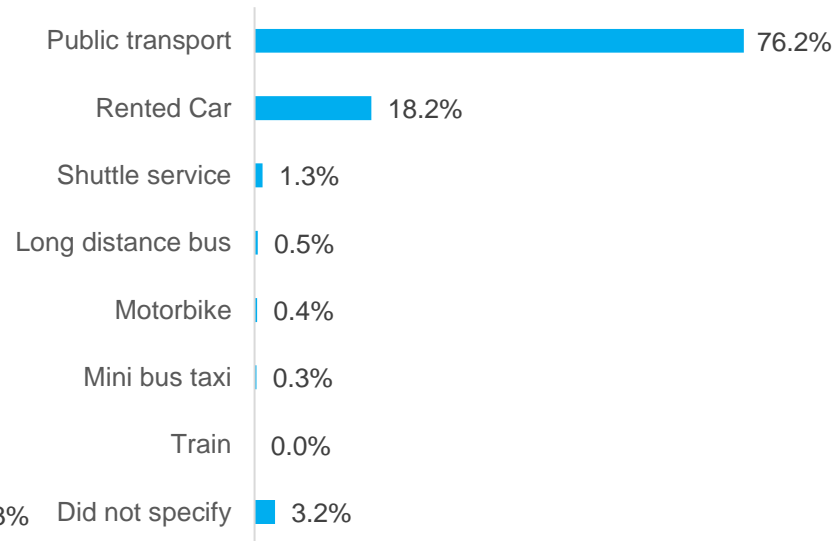
4. Visitor trends & patterns

- Figure 18 shows that self-catering units, guesthouses, and bed and breakfast (B&B) establishments ranked as the top three accommodation choices among travellers.
- Over 70% of visitors used public transport while visiting the Western Cape, as demonstrated in Figure 19.
- Consumer studies report that information sources can influence an individual's decision-making process when preparing for a trip. As can be seen in Figure 20, visitor information centres (43.0%), word of mouth (31.2%), and return visits (10.2%) were ranked as the most used information sources by visitors when planning their trips to the Western Cape.

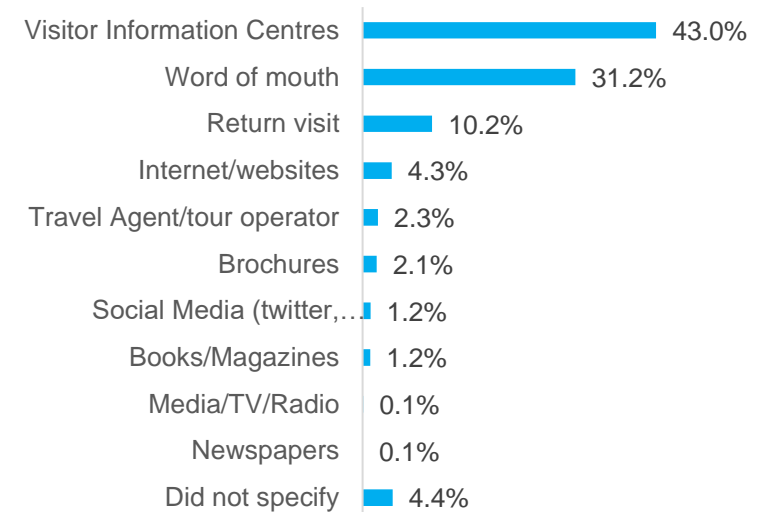
4.10 Figure 18: Accommodation usage



4.11 Figure 19: Mode of transport



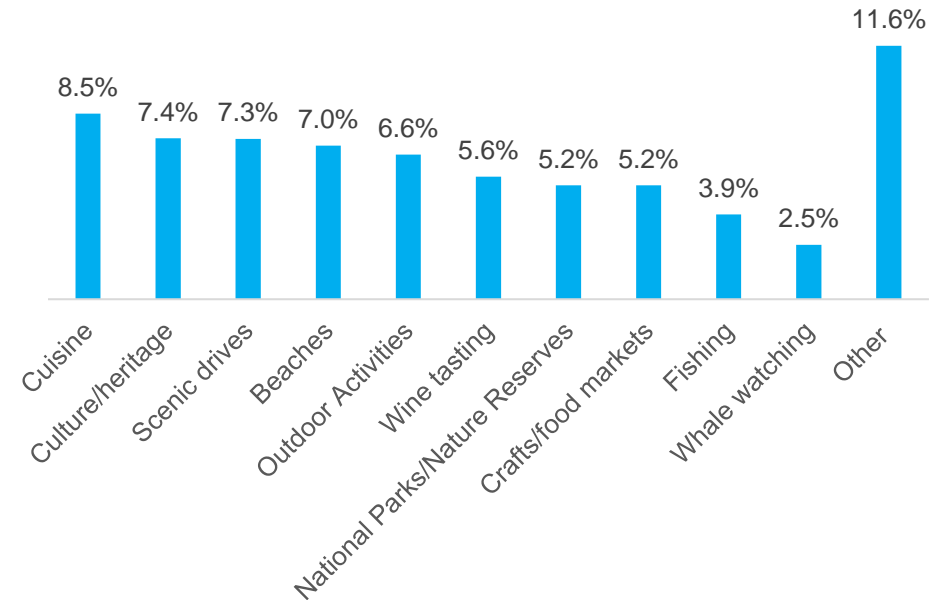
4.12 Figure 20: Top information sources



4. Visitor trends & patterns

- The Western Cape of South Africa is a stunning region that offers a wide range of activities for visitors to enjoy. The province's lush valleys and rolling hills are home to some of the best wineries in the country, making it the perfect destination for wine-tasting and tours to wineries by enthusiasts.
- For those who appreciate history and diverse cultures, the Western Cape is an excellent choice. Visitors can immerse themselves in a variety of cultural and heritage experiences that enhance their knowledge and understanding of the country's rich history.
- The Western Cape is an ideal destination for those who want to escape the hustle and bustle of city life and immerse themselves in the beauty of nature. At the same time, Cape Town, the province's capital city, offers a lively nightlife, gourmet dining experiences, and world-class shopping for those who love the city life.
- According to statistics presented in Figure 21, the top three activities enjoyed by visitors to the Western Cape were cuisine (enjoyed by 8.5% of visitors), culture/heritage activities (7.4%), and scenic drives (7.3%). These activities were followed by visits to beaches, outdoor activities, wine-tasting, and experiences in national parks or nature reserves. Other activities included adventure, shopping, golf, cruises, and birding.

4.13 Figure 21: Top activities undertaken in the Western Cape



An aerial photograph of the Western Cape coastline, showing a range of mountains and a large body of water. The mountains are in shades of blue and green, and the water is a deep blue. The sky is a pale, hazy blue.

Regional Performance in the Western Cape

Period: January to June 2023

5. Regional Performance in the Western Cape

OVERVIEW OF REGIONAL VISITOR TRENDS AND PATTERNS BY REGION, JAN–JUN 2023

Tourism indicators	Winelands	Garden Route & Klein Karoo	Overberg	Weskus
% Share overseas	17.4%	30.5%	14.3%	83.7%
% Share domestic	82.6%	69.5%	85.7%	16.3%
% Share of overnight visitors	10.4%	-	47.7%	32.4%
% Share of day visitors	89.6%	100.0%	52.3%	67.6%
Top international markets	<ul style="list-style-type: none"> UK (39.1%) Germany (19.9%) USA (19.3%) Western Cape (71.7%) 	<ul style="list-style-type: none"> Germany (30.5%) UK (20.0%) Switzerland (8.6%) Western Cape (22.8%) 	<ul style="list-style-type: none"> Germany (40.9%) UK (14.6%) France (10.4%) Western Cape (80.5%) 	<ul style="list-style-type: none"> UK (19.5%) Germany (12.5%) Netherlands (8.2%) Western Cape (62.4%)
Top domestic markets	<ul style="list-style-type: none"> Gauteng (6.3%) Free State (1.4%) 	<ul style="list-style-type: none"> Eastern Cape (17.1%) Gauteng (11.5%) 	<ul style="list-style-type: none"> Gauteng (3.1%) 	<ul style="list-style-type: none"> Gauteng (10.2%) Northern Cape (2.2%)
Main purpose of visit	Leisure/Holiday (15.3%)	Leisure/Holiday (75.7%)	Leisure/Holiday (66.3%)	Leisure/Holiday (91.2%)
Age profile of visitors	-	36-50 (43.3%)	36-50 (39.0%)	51-70 (32.4%)
Group Size	-	<ul style="list-style-type: none"> Pairs (55.2%) Groups of four (21.2%) 	<ul style="list-style-type: none"> Pairs (40.4%) Solo travellers (38.6%) 	<ul style="list-style-type: none"> Pairs (37.3%) Solo traveller (31.9%)
Length of stay	-	Two nights (27.2%)	7 & more nights (19.6%)	Two nights (14.6%)
Mode of transport	-	Public transport (70.8%)	Public transport (78.4%)	Public transport (60.3%)
Top information sources	-	<ul style="list-style-type: none"> Return visit (46.4%) Internet/websites (26.9%) 	<ul style="list-style-type: none"> Visitor Information Centres (45.7%) Word of mouth (33.0%) 	<ul style="list-style-type: none"> Visitor Information Centres (15.9%) Word of mouth (13.5%)
Average daily spend	-	R1001-R2000 (36.5%)	R1001-R2000 (34.0%)	R201-R500 (15.6%)
Type of accommodation	-	R2001-R5000 (25.7%)	R2001-R5000 (18.0%)	R1001-R2000 (17.1%)
Top three activities undertaken	<ul style="list-style-type: none"> Culture/heritage (29.8%) Outdoor Activities (18.3%) Scenic drives (17.8%) 	<ul style="list-style-type: none"> Beaches (19.7%) Scenic drives (16.8%) Outdoor Activities (15.0%) 	<ul style="list-style-type: none"> Cuisine (18.1%) Outdoor Activities (11.3%) Scenic drives (11.1%) 	<ul style="list-style-type: none"> Scenic drives (23.9%) Wine tasting (14.5%) Culture/heritage (9.0%)

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

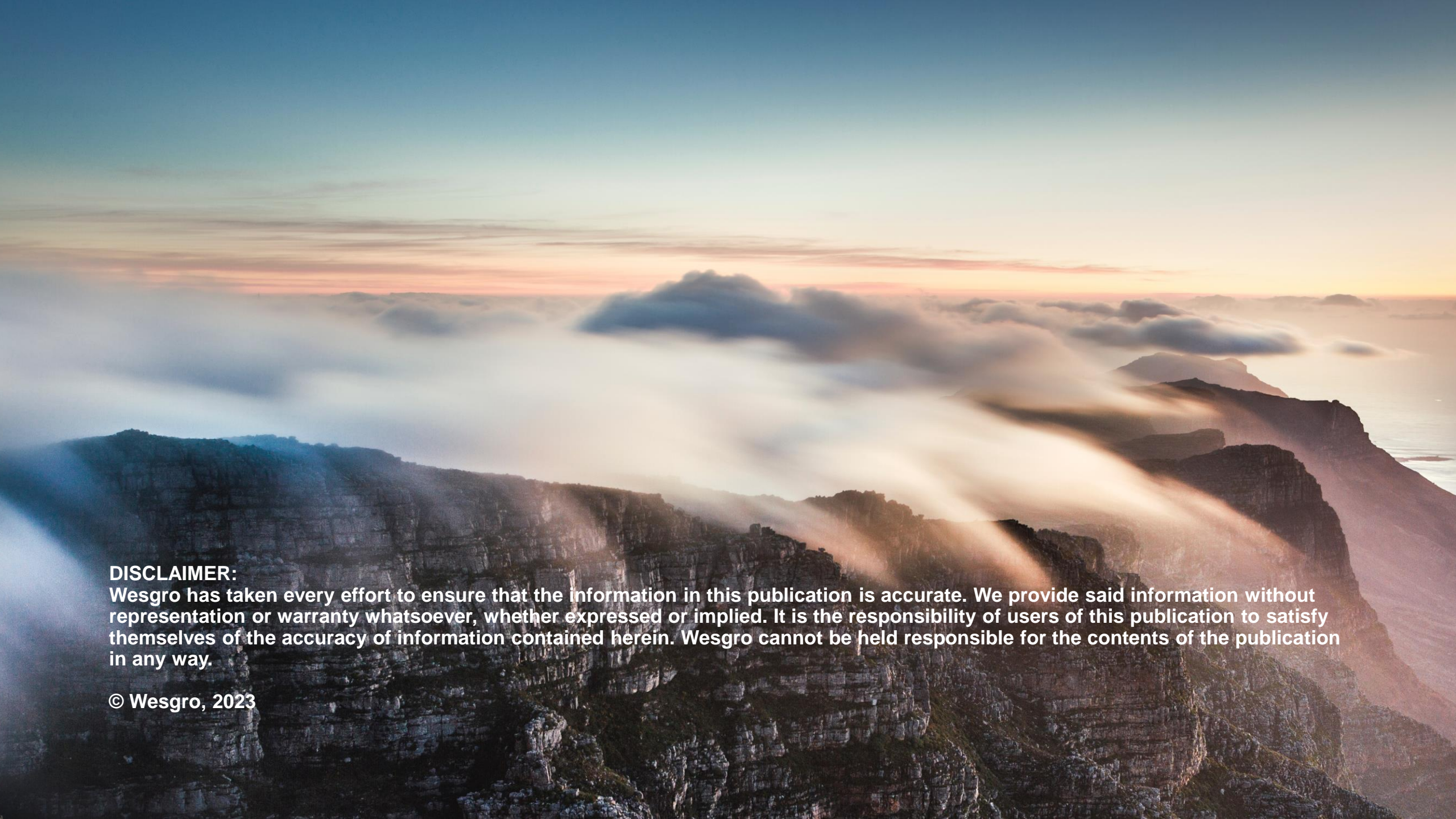
Source: Wesgro, 2023

6. Acknowledgements

Acknowledgments 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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