



Cape Garden Route & Klein Karoo Visitor Trends

WesGRO
cape town & western cape
research

Annual 2016

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1.Overview

- This report provides an overview of the tourism trends and patterns in the Cape Garden Route & Klein Karoo. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.
- The visitor tracking survey is voluntary survey only placed at our local tourism offices it is not representative of total tourism industry of the region.
- 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.
- In 2016 Cape Garden Route & Klein Karoo received a total of 3283 responses to the regional visitor tracking survey from the respective tourism offices.

Knysna	879
George	1098
Oudtshoorn	237
Mossel Bay	139
Plettenberg bay	304
Calitzdorp	367
Ladismith	243



2. Executive Summary

- Cape Garden Route & Klein Karoo received 45,6% overseas visitors and 53,2% domestic visitors illustrating equal split of overseas and domestic visitors to the region.
- Cape Garden Route & Klein Karoo received 56,5% of overnight visitors making positive contribution to the accommodation sector.
- The region received slightly lower percentage share of day visitors with 34,6% for the period, which could be your visitors coming to the region for events.
- Visitors to the region enjoyed travelling in pairs (49,2%), which could be your couples on holiday.
- Visitors to the region also enjoyed travelling alone (16,2%), which could be your business visitors to the region.
- The age group of visitors primarily travelling to the Cape Garden Route & Klein Karoo was 36-50 (28,7%).
- The top international markets to the region were United Kingdom (33,5%), Germany (11,0%) and Netherlands (12,7%).
- Both the overseas and domestic market enjoyed scenic drives, cuisine and outdoor activities.
- 88,8% of visitors came for holiday showcasing the region as favorable holiday destination.
- The region received R501-R1000 (18,3%) daily spend contributing positively to the economy of the Cape Garden Route & Klein Karoo.
- R501-R1000 was the highest percentage share spend on accommodation, which contributes positively to the accommodation sector of the region increasing occupancy rates.
- Visitors to the Cape Garden Route & Klein Karoo enjoyed staying at self-catering units and B&Bs preferably.
- Rented car was most favourable mode of transport to the Cape Garden Route & Klein Karoo.
- Internet/websites and word of mouth was most common source of information used.

Cape Garden Route & Klein Karoo Visitor Trends Annual 2016

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%

share of overseas visitors	45.6%
share of domestic visitors	53.2%
share of overnight visitors	56.5%
share of day visitors	34.6%

Top 3

International markets

United Kingdom (33.5%)
Germany (11%)
Netherlands (12.7%)

Top 3

domestic markets

Gauteng (15.7%)
Western Cape (65.5%)
Eastern Cape (11%)

Main purpose of visit



Holiday/Leisure	88.8%
Business	3.4%
VFR	0.9%



Travel group size
Pairs 49.2%
Alone 16.2%

Age group
36-50 (28.7%)

Length of stay

1 night 12.6%
2 nights 14.1%
3 nights 11.1%



Rented car 51.1%
Own vehicle 21.4%

Top information sources

Internet/Websites..19.4%
Word of mouth.....15.8%

Average daily spend
R501 – R1000 (18.3%)



Average spend on accommodation
R501 – R1000 (11.5%)



Top 3

activities in the Cape Garden Route & Klein Karoo



Top accommodation

B&B's 13.4%
Self-catering 15.5%



Overseas Domestic

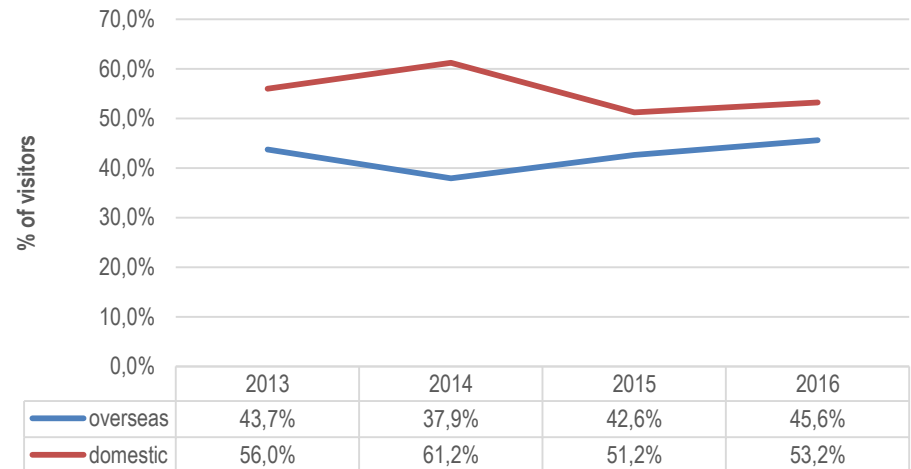
Scenic drives (19.8%) Cuisine (11.7%) Outdoor activities (17.5%)
Scenic drives (25%) Cuisine (9.1%) Outdoor activities (12%)

3. Cape Garden Route & Klein Karoo Trends & Patterns

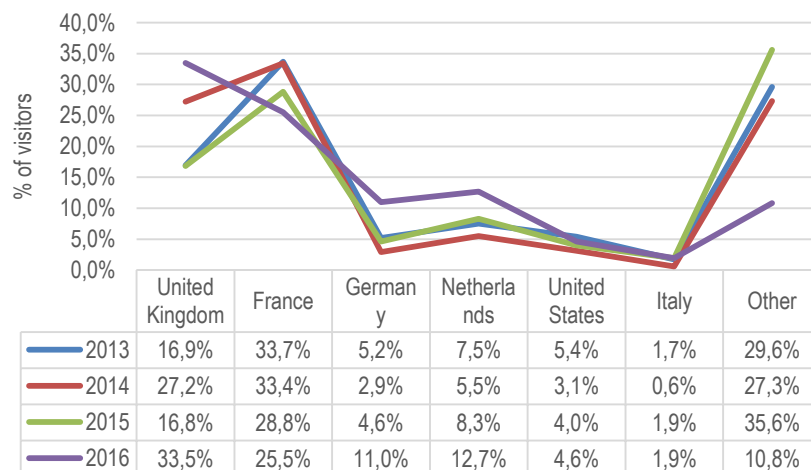
- Cape Garden Route & Klein Karoo received 45,6% overseas visitors and 53,2% domestic visitors in 2016.
- Traditional markets such as the United Kingdom and Germany ranked as the region's top two international countries from 2013-2016.
- The European markets, coupled with the United States travellers continue to drive tourism activity in Cape Garden Route & Klein Karoo.
- From 2013-2016 the Western Cape market consistently led domestic travel into the Cape Garden Route & Klein Karoo, followed by Gauteng and the Eastern Cape. The other includes smaller sample size of domestic provinces to the region.

3.1. Origin of visitors

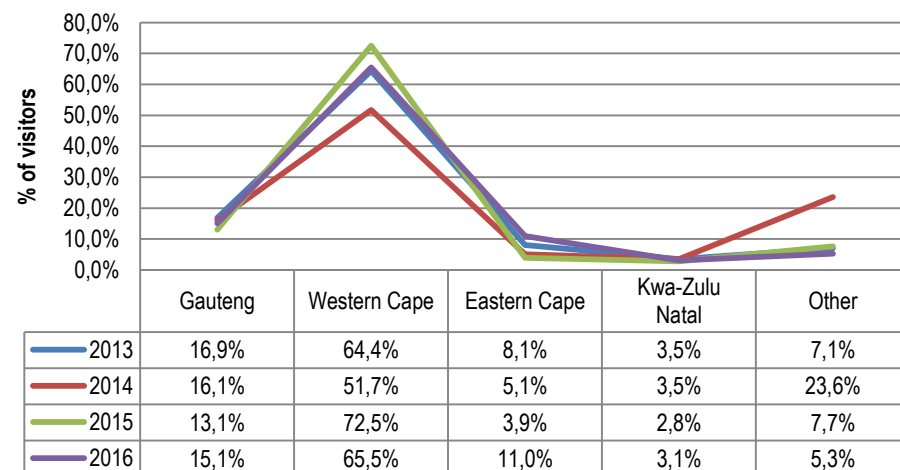
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2013-2016



TOP OVERSEAS VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2013-2016

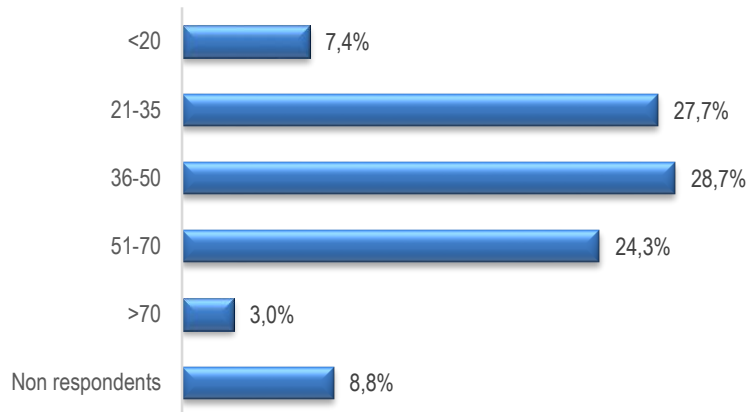


TOP DOMESTIC VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2013-2016



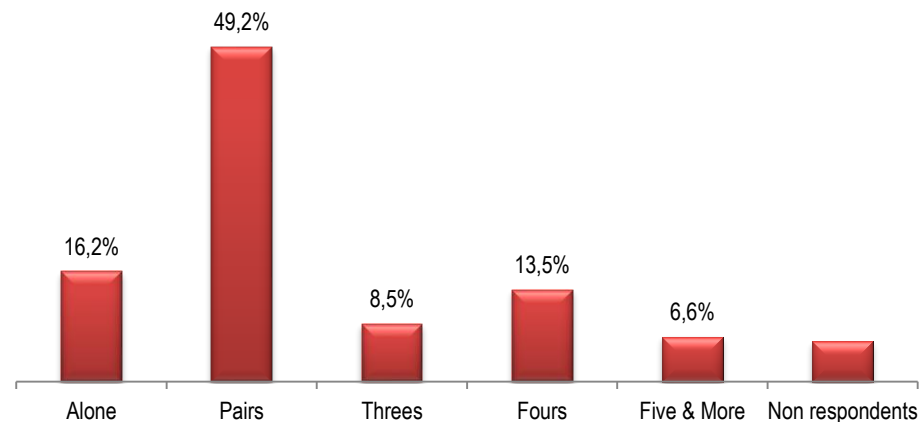
3.2 Age group

AGE GROUP OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



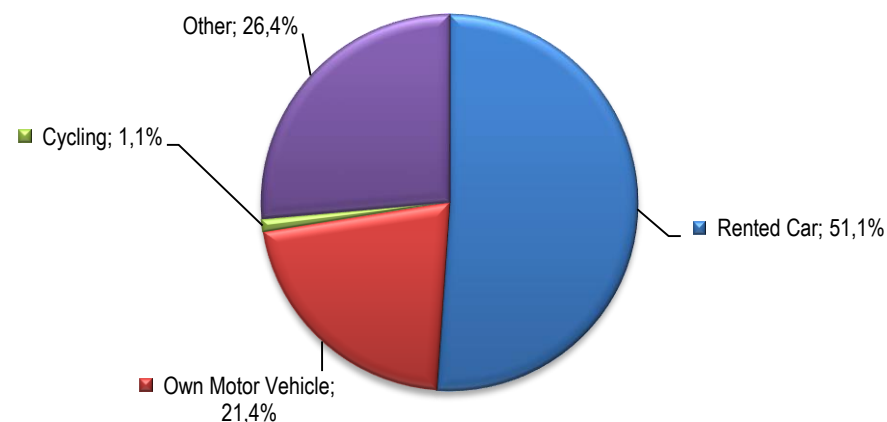
3.3 Group size

AVERAGE TRAVEL GROUP OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



3.4 Mode of transport

MAIN MODE OF TRANSPORT USED BY VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO 2016

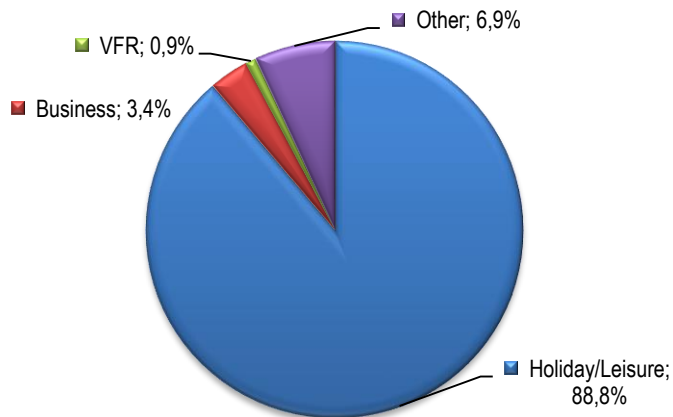


- The age groups (36-50 years) 28,7% was the leading age group amongst all visitors to the region.
- The travel group size revealed that visitors to the region enjoyed travelling in pairs (49,2%), which could be your couples or friends.
- Travelling alone (16,2%) to the region was also popular amongst visitors, which could be your business tourists.
- Own motor vehicle (21,4%) and rented car (51,1%) was the most favourable mode of transport used by visitors to the Cape Garden Route & Klein Karoo.

- The trends revealed that holiday/leisure ranked as the main motivation for travel to the Cape Garden Route & Klein Karoo with percentage share of 88,8%.
- Visitors to the region also came for business 3,4% and visiting friends and family 0,9%
- The top five activities in the region during in 2016 were:
 - Scenic drives (19,2%)
 - Gourmet restaurants (14,6%)
 - Outdoor activities (14,5%)
 - Culture/heritage experiences (10,9%)
 - Crafts/food markets (7,8%)

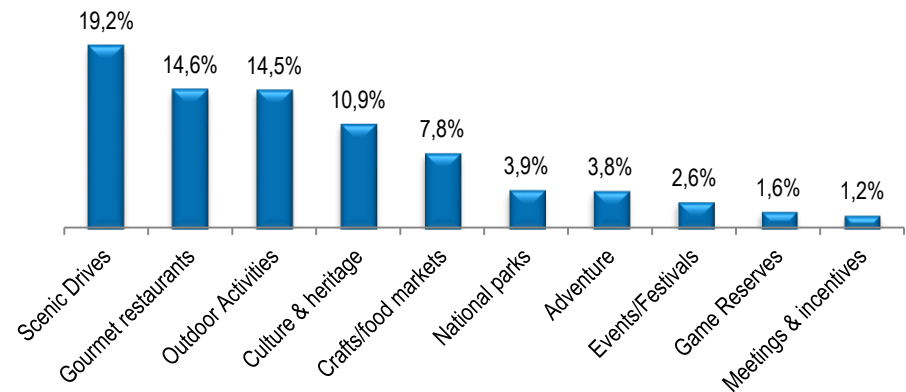
3.5. Purpose of visit

MAIN PURPOSE OF VISIT TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



3.6. Main activities

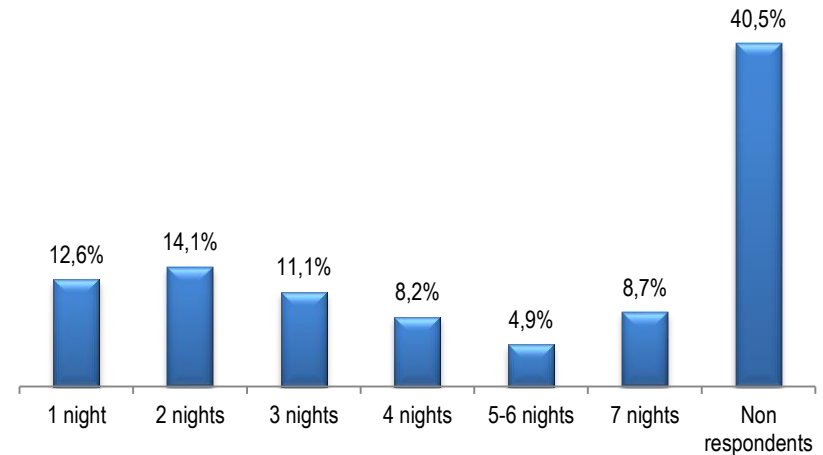
TOP ACTIVITIES TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



3.7 Length of stay

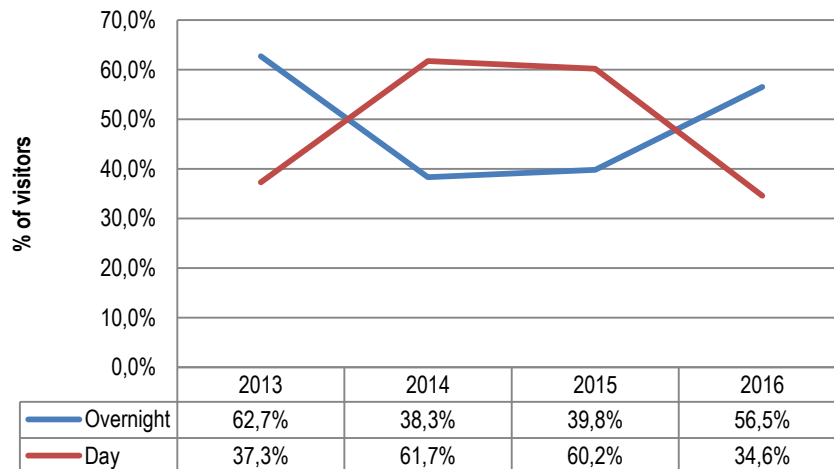
- The majority of the visitors to the Cape Garden Route & Klein Karoo stayed for one night to two nights.
- The trends revealed a strong share of day visitors 34,6% than overnight visitors 56,5% amongst all visitors to the Cape Garden Route & Klein Karoo in 2016.
- The region had positive overnight stay of 56,5%, which contributes positively to the accommodation establishments within the Cape Garden Route & Klein Karoo.
- Self catering (15,5%), B&B (13,4%) and guesthouses (12,2%) ranked amongst the most popular accommodation categories used by visitors to the Cape Garden Route & Klein Karoo.

AVERAGE LENGTH OF STAY OF VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



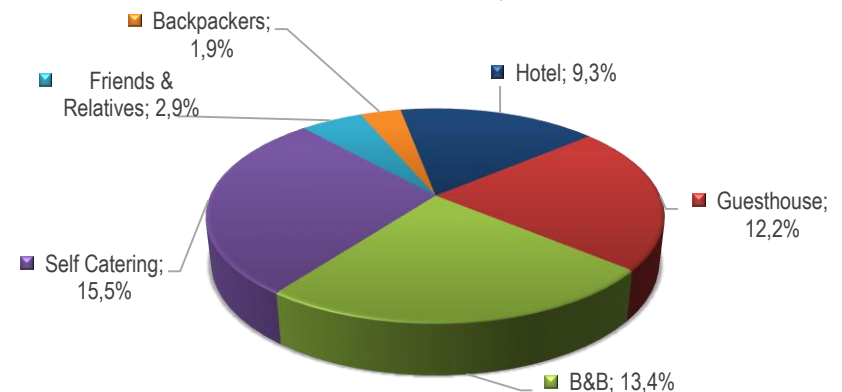
3.8 Overnight stay

% SHARE OF OVERNIGHT & DAY VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2013-2016



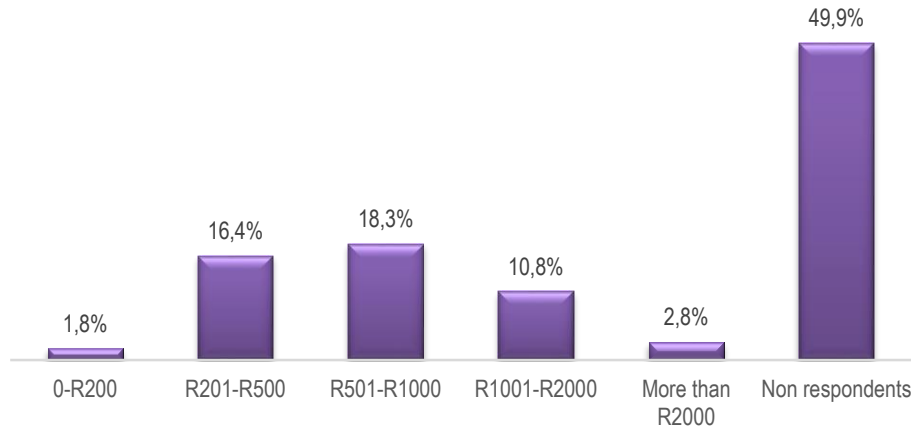
3.9 Accommodation used by visitors

ACCOMMODATION USED BY VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



3.10 Average daily spend

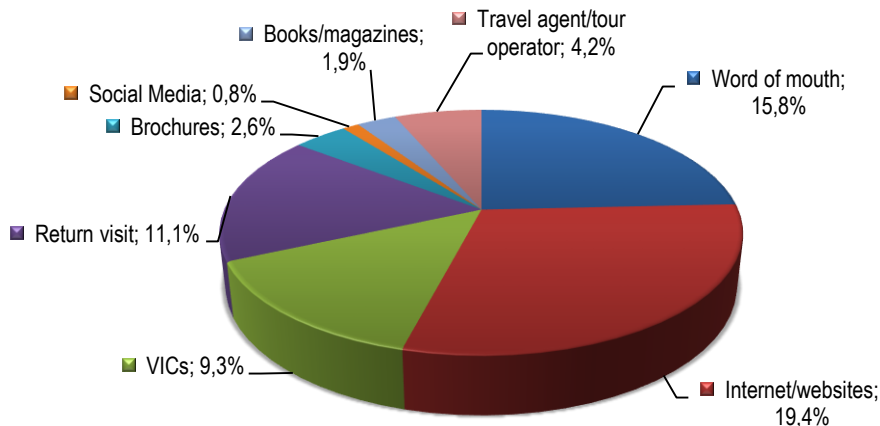
AVERAGE DAILY SPEND ON VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



- The highest average daily spend in 2016 for the Cape Garden Route & Klein Karoo was R201-R500 (18,3%).
- Internet/websites (19,4%) and word of mouth (15,8%) were the most popular source of information used.
- Amongst all visitors to the Cape Garden Route & Klein Karoo the highest expenditure range on accommodation was R501-R1000 (11,5%).

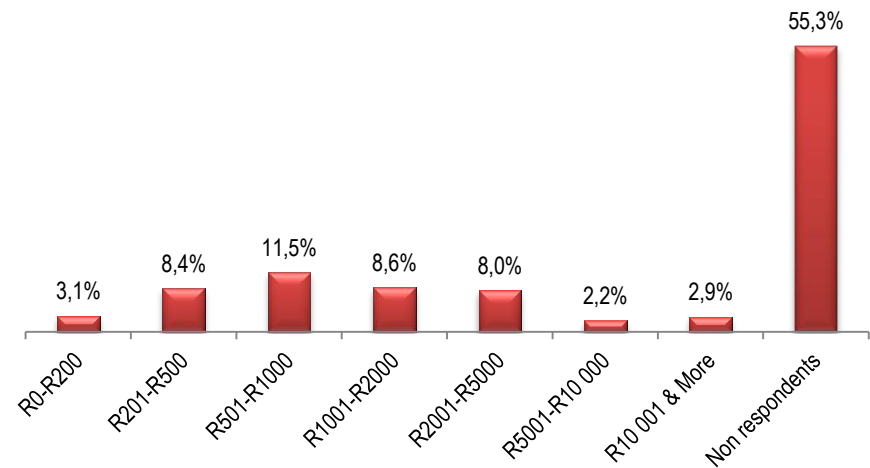
3.11 Information sources used

MAIN SOURCE OF INFORMATION USED BY VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



3.12 Average spend on accommodation

AVERAGE SPEND ON ACCOMMODATION USED BY VISITORS TO THE CAPE GARDEN ROUTE & KLEIN KAROO, 2016



4. Profile/Snapshot of overseas and domestic market

OVERVIEW OF OVERSEAS & DOMESTIC VISITOR TRENDS AND PATTERNS, 2016		
TOURISM INDICATOR	OVERSEAS	DOMESTIC
Age group	21-35 (30.5%)	21-35 (35.9%)
	36-50 (27.4%)	36-50(25.8%)
	51-70 (7.6%)	51-70 (6.1%)
Main purpose of visit	Holiday/leisure (95.7%)	Holiday/leisure (85.5%)
	Business (1.5%)	Business (9.0%)
	Events (1.1%)	Education (4.1%)
Most common travel group size	Pairs (55.8%)	Alone (52.1%)
	Alone (19.1%)	Pairs (34.8%)
Most common length of stay	2 nights (32.9%)	1 night (50.8%)
	3 nights (21.5%)	2 nights (14.9%)
Most common mode of transport	Rented car (51.0%)	Rented car (17.6%)
	Own Motor Vehicle (26.9%)	Own Motor Vehicle (81.5%)
Top information sources	Word of mouth (53.5%)	Word of mouth (53.5%)
	Internet/websites (14.5%)	Internet/websites (14.5%)
Average daily spend	R501-R1000 (40.9%)	R501-R1000 (40.9%)
Type of accommodation	Hotel (26.7%)	Self-catering (42.6%)
	Self-Catering (21.2)	B&B (43.6%)
Average spend on accommodation	R501-R1000 (39.0%)	R501-R1000 (29.0%)
Top three activities undertaken	Scenic drives (19.6%)	Scenic drives (25.0%)
	Gourmet restaurants (11.7%)	Outdoor Activities (12.0%)
	Outdoor Activities (17.5%)	Gourmet restaurants (9.1%)

5. Profile/Snapshot of top international markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL MARKET, 2016				
TOURISM INDICATOR	United Kingdom	Germany	Netherlands	United States
Main purpose of visit	Holiday/leisure (100.0%)	Holiday/leisure (98.9%)	Holiday/leisure (100.0%)	Holiday/leisure (100.0%)
Most common travel group size	Pairs (57.7%)	Pairs (59.5%)	Pairs (55.7%)	Pairs (56.7%)
	Alone (18.2%)	Threes (15.2%)	Alone (19.2%)	Alone (19.2%)
Most common age group	21-35 years (25.6%)	57-70 years (37.5%)	21-35 years (35.6%)	21-35 years (35.6%)
Most common length of stay	2 nights (35.4%)	1 night (25.9%)	2 nights (36.4%)	2 nights (36.4%)
	3 nights (22.7%)	2 nights (27.8%)	3 nights (22.7)	1& 3 nights (22.7%)
Most common mode of transport	Rented car (97.7%)	Rented car (76.9%)	Rented car (97.7%)	Rented car (97.7%)
Top information sources	Internet/websites (51.4%)	Word of mouth (28.6%)	Internet/websites (51.4%)	Internet/websites (51.4%)
		Internet/websites (42.9%)	-	-
Most common type of accommodation	B&B (38.7%)	-	B&B (38.7%)	B&B (38.7%)
Top three activities undertaken	Culture & Heritage (11.8%)	Culture & Heritage (17.5%)	Culture & Heritage (11.8%)	Culture & Heritage (11.8%)
	Outdoor activities (16.7%)	Scenic drives (16.7%)	Outdoor activities (16.7%)	Outdoor activities (16.7%)
	Scenic Drives (21.6%)	Outdoor activities (15.8%)	Scenic Drives (21.6%)	Scenic Drives (21.6%)

6. Profile/Snapshot of top domestic markets

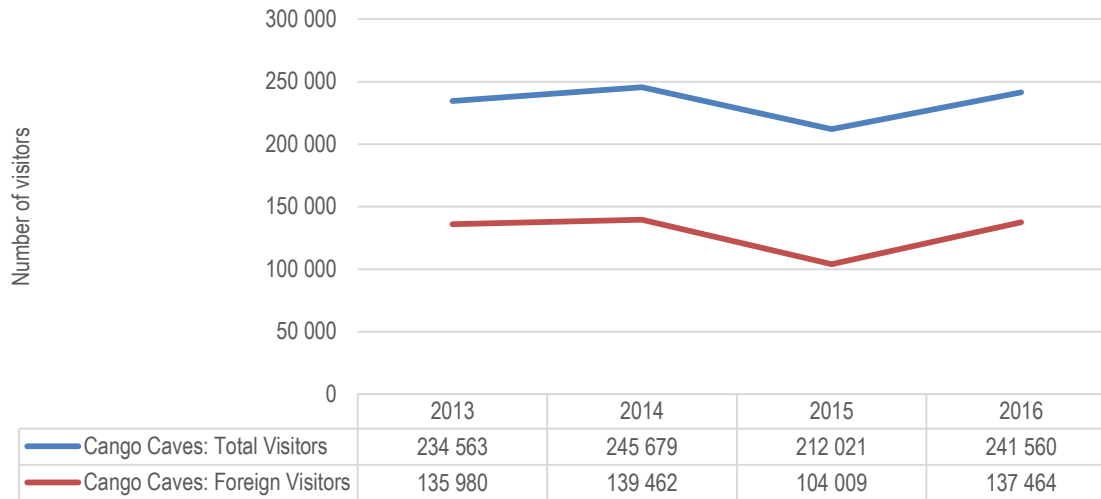
OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC MARKET, 2016				
TOURISM INDICATOR	Western Cape	Gauteng	Eastern Cape	Kwa-Zulu Natal
Main purpose of visit	Holiday/leisure (87.6%)	Holiday/leisure (88.0%)		Holiday/leisure (92.7%)
	Business (6.0%)		Holiday/leisure (92.7%)	
	Education (4.1%)	Business (7.0%)		
Most common travel group size	Alone (54.6%)	Pairs (52.1%)	Alone (15.4%)	Alone (15.4%)
	Pairs (29.9%)	Alone (22.3%)	Pairs (61.5%)	Pairs (61.5%)
Most common age group	36-50 years (58.5%)	36-50 years (42.9%)	-	-
Most common length of stay	1 night (38.7%)	1 night (25.0%)		-
	2 nights (24.5%)	7 nights & More (23.4%)	-	
Most common mode of transport	Own motor vehicle (89.3%)	Rented car (54.2%)	Rented car (52.0%)	Rented car (52.0%)
	Rented car (7.7%)	-	Own motor vehicle (40.0%)	Own motor vehicle (40.0%)
Top information sources	Internet/websites (14.1%)			-
	Word of mouth (57.6%)	Word of mouth (57.1%)	-	
Most common type of accommodation	Self-catering (50.8%)			Self-catering (68.8%)
	B&B (20.2%)	Self-catering (57.5%)	Self-catering (68.8%)	
Top three activities undertaken	Culture & Heritage (11.0%)	Crafts/food markets (11.5%)	Scenic drives & Outdoor activities (18.2% each)	Scenic drives & Outdoor activities (18.2% each)
	Scenic drives (28.0%)	Scenic drives (23.9%)		-
	Outdoor activities (11.3%)	Outdoor activities (12.4%)	-	

7. Cape Garden Route & Klein Karoo Towns

OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, 2016					
TOURISM INDICATOR	Knysna	George	Calitzdorp	Oudsthoorn	Plettenberg Bay
% Share overseas	42.5%	11.3%	90.4%	44.9%	10,1%
% Share domestic	57,5%	88.9%	-	45,1%	88.9%
Top international markets	United Kingdom (25.6%)	Germany (31.3%)	Germany (31.7%)	United Kingdom (15.6%)	Germany (31.2%)
	Germany (14.1%)	United Kingdom (16.3%)	-	Germany (14.1%)	United Kingdom (16.5%)
	Netherlands (10.5%)	-	-	Netherlands (12.5%)	-
Top domestic markets	Gauteng (18.4%)	Western Cape (77.8%)	Western Cape (68.2%)	Gauteng (28.4%)	Western Cape (77.8%)
	Western Cape (39.5%)	Gauteng (6.9%)	Gauteng (10.6%)	Western Cape (49.5%)	Gauteng (6.5%)
	-	Eastern Cape (1.6%)	Eastern Cape (11.1%)	-	Eastern Cape (1.5%)
Main purpose of visit	Holiday/leisure (69.3%)	Holiday/leisure (75.9%)	Holiday/leisure (90.9%)	Holiday/leisure (79.3%)	Holiday/leisure (85.9%)
	Honeymoon/weddings (11.5%)	Business (9.6%)	-	Honeymoon/weddings (11.5%)	Business (10.5%)
	-	Education (3.9%)	-	-	-
Most common travel group size	Pairs (44.1%)	Alone (43.2%)	Pairs (57.6%)	Pairs (54.1%)	Alone (53.2%)
	Fours (22.7%)	Pairs (24.0%)	Alone (34.9%)	Fours (22.7%)	Pairs (24.0%)
Most common length of stay	2 nights (20.8%)	1 night (31.6%)	1 night (50.0%)	2 nights (20.8%)	1 night (41.6%)
	3 nights (21.5%)	7 nights & more (22.6%)	2 nights (34.2%)	3 nights (21.5%)	7 nights & more (22.6%)
Most common mode of transport	Rented car (57.3%)	Rented car (35.0%)	Rented car (28.6%)	Rented car (57.3%)	Rented car (35.0%)
	Own Motor Vehicle (38.9%)	Own Motor Vehicle (45.0%)	Own Motor Vehicle (55.4%)	Own Motor Vehicle (28.9%)	Own Motor Vehicle (55.0%)
Top information sources	Word of mouth (41.4%)	-	Word of mouth (48.1%)	Word of mouth (41.4%)	Word of mouth (56.1%)
	Internet/websites (42.2%)	-	Internet/websites (48.1%)	Internet/websites (42.2%)	Internet/websites (35.1%)
Average daily spend	R501-R1000 (39.2%)	-	-	R501-R1000 (38.2%)	-
Type of accommodation	Self-catering (32.2%)	Self-catering (32.4%)	Self-catering (52.6%)	Self-catering (32.2%)	Self-catering (52.4%)
	B&B (20.9%)	-	B&B (32.9%)	B&B (20.9%)	-
Average spend on accommodation	R501-R1000 (40.6%)	-	-	R501-R1000 (40.6%)	-
Top three activities undertaken	Crafts/food markets (43.6%)	Culture/heritage (48.1%)	Scenic drives (30.7%)	Crafts/food markets (33.6%)	Culture/heritage (58.1%)
	Outdoor activities (27.8%)	Scenic drives (15.6%)	Wine tasting (21.2%)	Outdoor activities (27.8%)	Scenic drives (25.6%)
	Scenic drives (23.8%)	Outdoor activities (23.4%)	Health/Wellness (14.0%)	Scenic drives (23.8%)	Outdoor activities (13.4%)

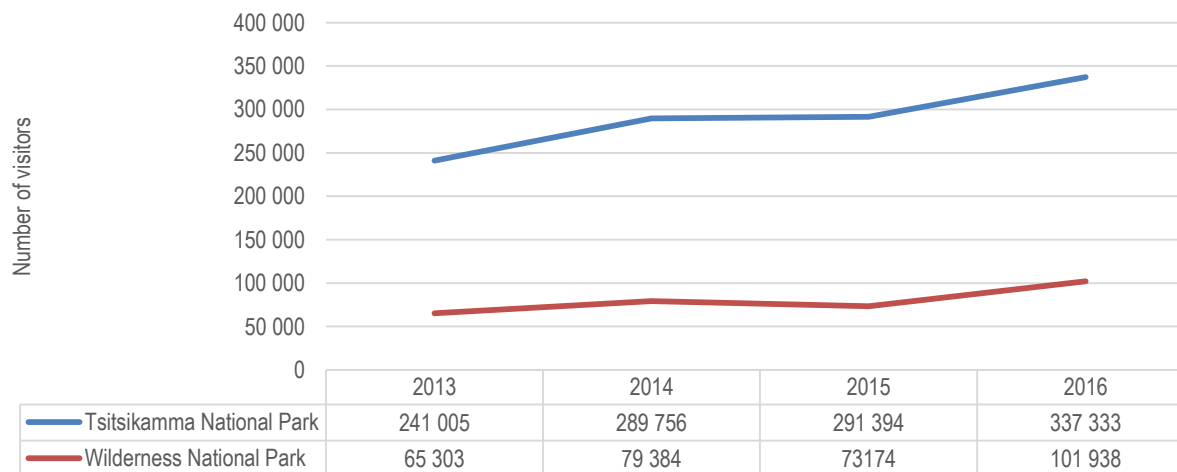
8. Cape Garden Route & Klein Karoo Attractions

TOTAL NUMBER OF VISITORS TO THE CANGO CAVES, 2013-2016



- Cango Caves received 241,560 of total visitors in 2016, when compared to the previous year the park received double digit growth of 13,9%.
- Cango Caves received 137,464 of foreign visitors in 2016, when compared to the previous year the park received double digit growth of 32,2%.
- Tsitsikamma National Park received 337,333 visitors in 2016, when compared to the previous year also received positive growth of 15,8%.
- Wilderness National Park welcomed 101,938 visitors during 2016, when compared to the previous year there was 39,3% growth.

TOTAL NUMBER OF VISITORS THECAPE GARDEN ROUTE & KLEIN KAROO NATIONAL PARKS, 2013-2016



9.Acknowledgements

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The participating local tourism offices in the Cape Garden Route & Klein Karoo:

- Calitzdorp Tourism
- George Tourism
- Knysna Tourism
- Ladismith Tourism
- Mossel Bay Tourism
- Oudtshoorn Tourism
- Plettenberg Bay Tourism

The participating attractions in the Cape Garden Route & Klein Karoo:

- Cango Caves
- South African National Parks
- Tsitsikamma National Park
- Wilderness National Park

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