Cape Garden Route & Klein Karoo

Tourism Visitor Trends
Annual 2015

1. Overview

Western Cape

In 2015, the share of domestic visitors (58.5%) dominated as the leading source of tourist arrivals was the Western Cape. The domestic arrivals were led by visitors from the Western Cape (48.8%), Gauteng (14.6%) and the Eastern Cape (4.4%). These are extremely important markets for the Western Cape and continue to drive domestic tourism into the province. Domestic visitors' top activities included scenic drives (27.2%), culture/heritage (14.9%) and outdoor activities (9.5%)

The Western Cape recorded a positive share (40.3%) of visitors from the international market. During 2015, Germany (27.2%) ranked as the top international market, closely followed by the United Kingdom (20.2%) and the Netherlands (8.7%). These markets are the dominant all-year round markets for the province. Top activities enjoyed by the international visitors included scenic drives (20.2%), culture/heritage (16.1%) and outdoor activities (15.8%)

A positive 51.0% of visitors indicated overnight stays and 49.0% were day visitors, with the most common length of stay ranging between one (38.1%), two (27.5%) and three (10.8%) nights per town. Of these visitors, top accommodation choices included self-catering establishments (32.0%) with an average daily expenditure of R501-R1000 spent on accommodation.

Holiday/leisure (79.3%) ranked as the leading purpose of travel amongst all visitors, followed by business (6.8%) and visiting friends and relatives (3.4%), which were the top three purpose of travel all year round for visitors. The most common age group amongst overseas and domestic visitors 36-50 years. Visitors primarily travelled in pairs (44.5%) and alone (27.6%) and utilised rented cars (42.8%) and their own motor vehicles (47.7%) as their main mode of transport. internet/websites (30.7%) ranked as the top information source utilised by visitors to the Western Cape, followed closely by word of mouth (23.2%).

Cape Garden Route & Klein Karoo

In 2015 the trends indicated a higher portion of domestic (61.2%) than overseas (37.9%) visitors. The top international markets to the region were Germany, United Kingdom and Netherlands. The top domestic markets were the Western Cape, Gauteng and Eastern Cape.

Visitors to the Cape Garden Route & Klein Karoo love staying for day visits (60.2%), but also enjoyed overnight stays (39.8%). Word of mouth and internet/websites was the main source of information and rented cars was the main mode of transport. Self-catering (22.0%) and B&B (14.4%) was the most popular choice of accommodation amongst visitors to Cape Garden Route & Klein Karoo.

Holiday/leisure (93.0%) was the main purpose of visit to the region, followed by business (3.7%) and education (1.4%), which was mostly driven into the town of George. Visitors enjoyed travelling alone and in pairs to the region. Staying for one night was seen as the most common length of stay. Overseas and domestic visitors enjoyed scenic drives, outdoor activities and culture/heritage when visiting the region, however domestic visitors enjoyed wine tasting as well.

Contents

2. Regional Visitor Trends

This report provides an overview of the tourism trends and patterns in the Cape Garden Route & Klein Karoo region. The findings will illustrate the total visitor foot count recorded by the respective tourism information offices across the Cape Garden Route & Klein Karoo, as well as key visitor trends obtained from the regional visitor tracking survey.

The total visitor foot count and the 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 foot counts and 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.

OVERVIEW OF CAPE GARDEN ROUTE & KLEIN KAROO VISITOR TRENDS AND PATTERNS, 2015		
% Share of overseas visitors	37.9%	
% Share of domestic visitors	61.2%	
% Share of overnight visitors	39.8%	
% Share of day visitors	60.2%	
Top international markets	Germany (23.0%)	
	United Kingdom (15.3%)	
	Netherlands (10.3%)	
Top domestic markets	Western Cape (79.2%)	
	Gauteng (10.3%)	
	Eastern Cape (4.1%)	
Main purpose of visit	Holiday/Leisure (93.0%)	
	Business (3.7%)	
	Education (1.4%)	
Most common age group	21-35 (18.4%)	
	51-70 (20.3%)	
	36-50 (19.3%)	
Most common travel group size	Alone (32.9%)	
	Pairs (45.6%)	
	Fours (8.3%)	
Most common length of stay per town	1 night (22.1%)	
	2 nights (19.7%)	
	3 nights (11.6%)	
Most common mode of transport	Rented Car (45.2%)	
	Own Motor Vehicle (26.7%)	
Most common accommodation used	Self-Catering (22.0%)	
	B&B (14.4%)	
Top information sources	Word of mouth (19.7%)	
	Internet/websites (23.9%)	
Average daily spend	R201-R500 (22.3%)	
Average spend on accommodation	R501-R1000 (22.3%)	
Top three activities undertaken in the Garden Route & Klein Karoo	**Overseas**	**Domestic**
	Scenic Drives (18.3%)	Scenic Drives (23.5%)
	Outdoor activities (15.1%)	Outdoor activities (11.6%)
	Culture/heritage (14.3%)	Wine tasting (11.2%)

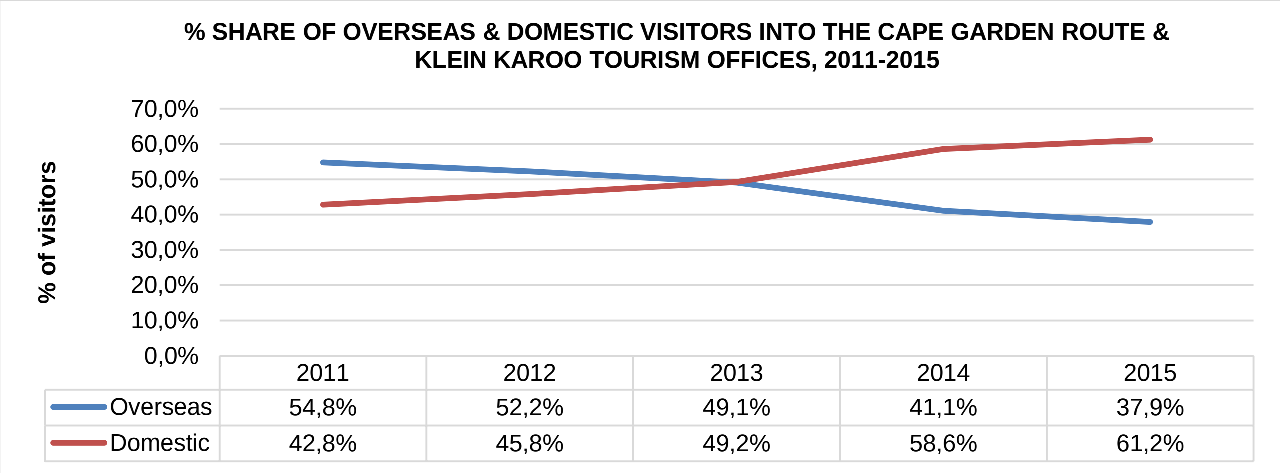
2.1 Trends and Patterns

In 2015 a total of **3,145** responses to the regional visitor tracking survey were received from the Cape Garden Route & Klein Karoo region. Responses were recorded in the following towns of the Cape Garden Route & Klein Karoo:

- George (1353);
- Calitzdorp (541);
- Knysna (414);
- Oudtshoorn (155);
- Plettenberg Bay (146);
- Pacalsdorp (52)
- Mossel Bay (73); and
- Ladismith (54)

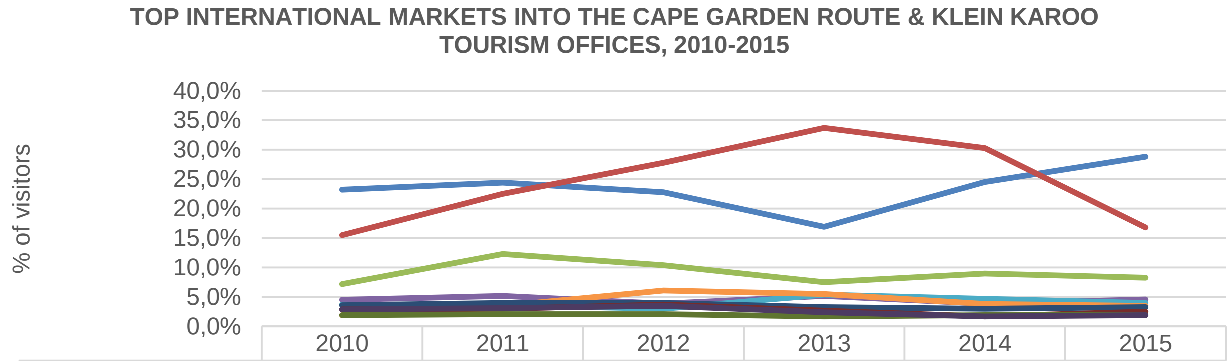
2.2 Origin of visitors

The graph below indicates that in 2015 there was a higher percentage of domestic visitors than overseas visitors. Amongst five years 2015 had the highest concentration of domestic visitors and 2011 had the highest concentration of overseas visitors.



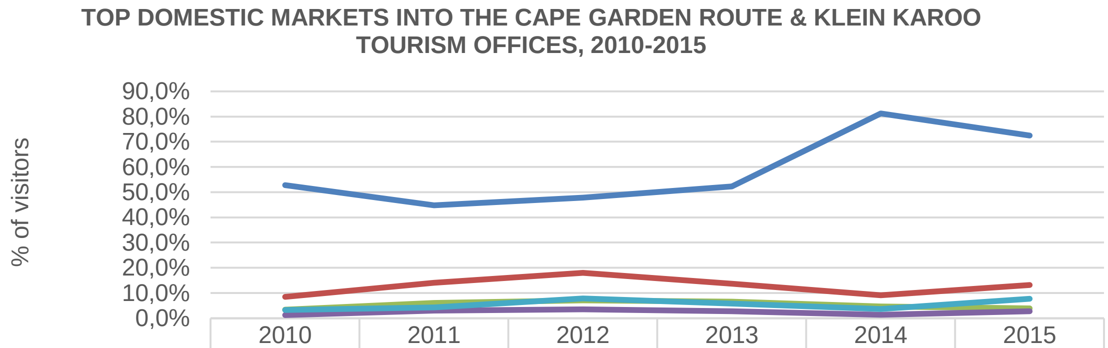
	2011	2012	2013	2014	2015
Overseas	54,8%	52,2%	49,1%	41,1%	37,9%
Domestic	42,8%	45,8%	49,2%	58,6%	61,2%

The Cape Garden Route & Klein Karoo tourism offices received the majority of visitors from the European countries, which can be seen by the five year trend in the graph below. United Kingdom and Germany ranked as the dominant source markets, followed by Netherlands and the United States.



	2010	2011	2012	2013	2014	2015
United Kingdom	23,2%	24,4%	22,8%	16,9%	24,5%	28,8%
Germany	15,5%	22,5%	27,8%	33,7%	30,3%	16,8%
Netherlands	7,2%	12,3%	10,4%	7,5%	9,0%	8,3%
United States	4,5%	5,2%	3,9%	5,2%	3,9%	4,6%
France	3,7%	3,6%	3,0%	5,4%	4,7%	4,0%
Switzerland	1,9%	3,5%	6,1%	5,5%	3,8%	3,5%
Australia	3,6%	4,0%	4,0%	3,3%	3,0%	3,3%
Belgium	2,9%	3,0%	3,7%	2,7%	1,7%	2,5%
Italy	1,9%	2,1%	2,1%	1,7%	1,9%	1,9%
Canada	2,9%	3,1%	3,5%	2,4%	1,7%	1,9%

The Western Cape and Gauteng was the dominant source provinces for the Cape Garden Route & Klein in 2015 followed by Eastern Cape and Kwa-Zulu Natal.



	2010	2011	2012	2013	2014	2015
Western Cape	52,8%	44,8%	47,8%	52,3%	81,2%	72,5%
Gauteng	8,5%	14,0%	18,0%	13,7%	9,1%	13,1%
Eastern Cape	3,4%	6,1%	7,1%	6,6%	4,7%	3,9%
Kwa-Zulu Natal	1,2%	3,0%	3,5%	2,8%	1,4%	2,8%
Other	3,2%	4,3%	7,8%	5,8%	3,6%	7,7%

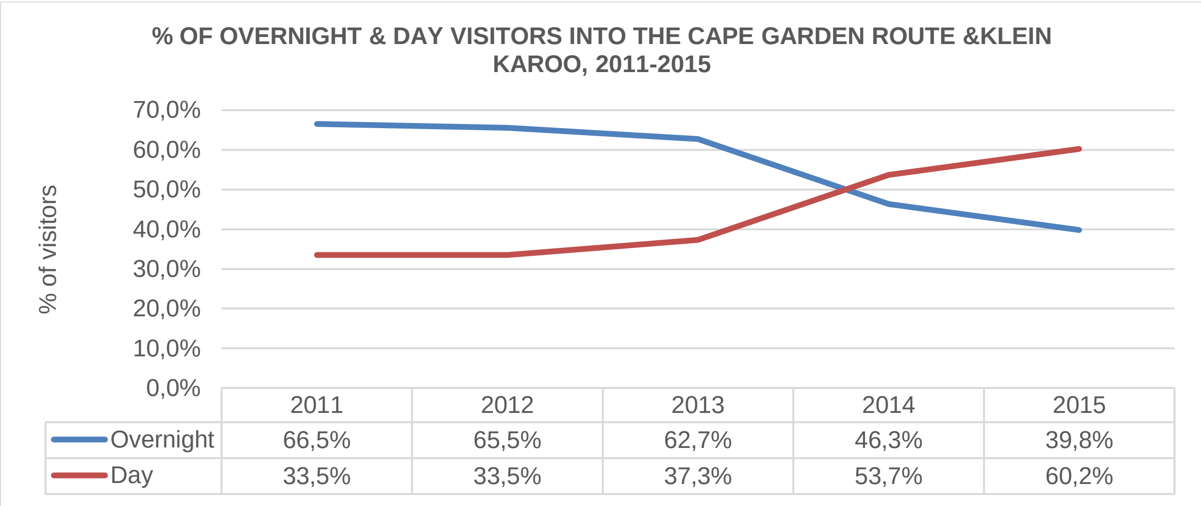
2.3 Age group of respondents

The age groups 36-50 and 51-70 years were the leading age groups amongst all, overseas and domestic visitors, followed by visitors between the age group 21-35.

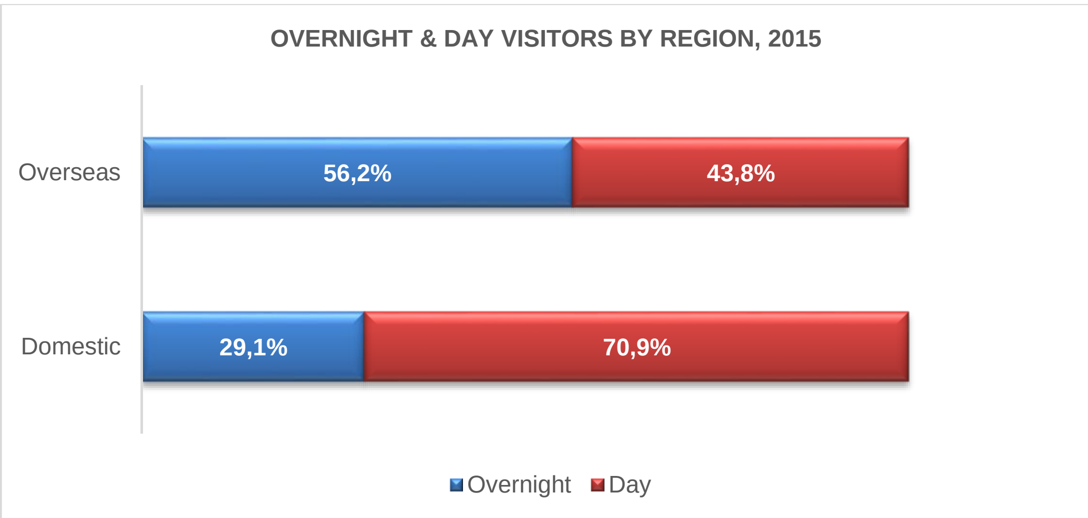
AGE GROUP OF VISITORS, 2015			
AGE GROUP	ALL	OVERSEAS	DOMESTIC
<20 years	4.8%	4.6%	4.7%
21-35 years	18.4%	19.0%	16.6%
36-50 years	19.3%	17.7%	21.4%
51-70 years	20.3%	21.7%	17.9%

2.4 Overnight visitor trends and average length of stay

There was a higher percentage of day visitors than overnight visitors in 2015. Amongst five years the Cape Garden Route & Klein Karoo had the highest percentage of day visitors in 2015 and the highest percentage of overnight visitors in 2011.

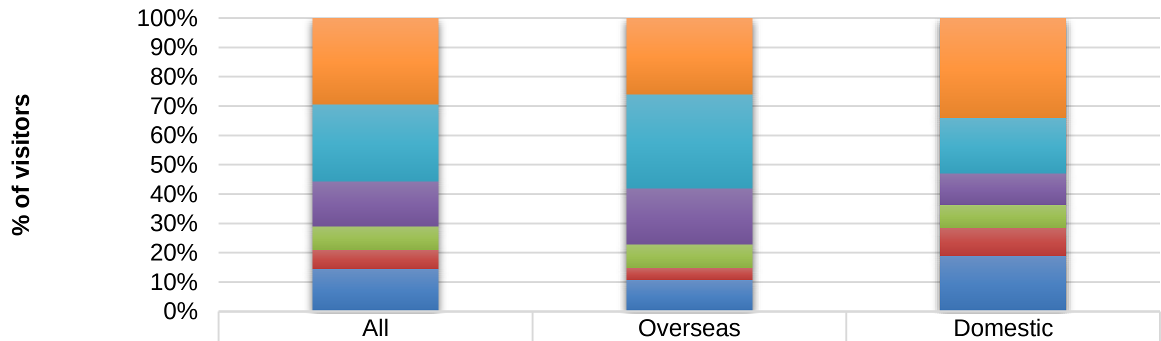


Day visitors were dominated by the domestic market (70.9%) compared with the overseas market (43.6%). However the overnight visitors were dominated by the overseas market (56.2%) compared to the domestic market (29.1%).



Amongst all, overseas visitors the majority of respondents indicated that they preferred to stay one to two nights predominantly. There was also strong presence in three night's length of stay amongst visitors and also strong presence of 7 nights and more length of stay for domestic visitors.

AVERAGE LENGTH OF STAY IN THE CAPE GARDEN ROUTE & KLEIN KAROO, 2015

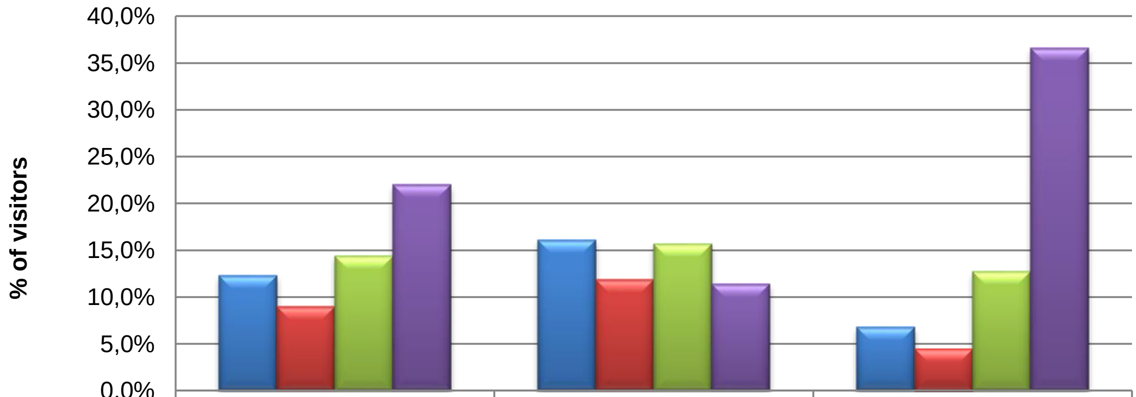


	All	Overseas	Domestic
1 night	22,1%	18,5%	27,0%
2 nights	19,7%	22,9%	15,1%
3 nights	11,6%	13,7%	8,5%
4 nights	6,0%	5,7%	6,2%
5-6 nights	4,9%	2,9%	7,6%
7 nights & more	10,9%	7,7%	15,1%

2.5 Accommodation usage and expenditure

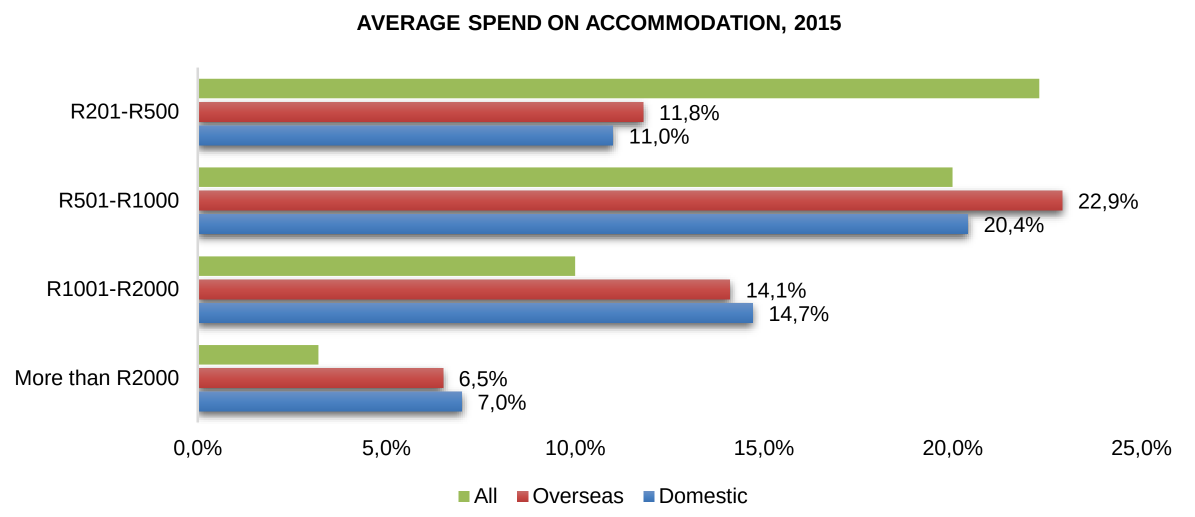
Amongst all and domestic visitors self-catering was the preferred accommodation, amongst overseas visitors hotels was the preferred accommodation.

ACCOMMODATION USED BY VISITORS, 2015



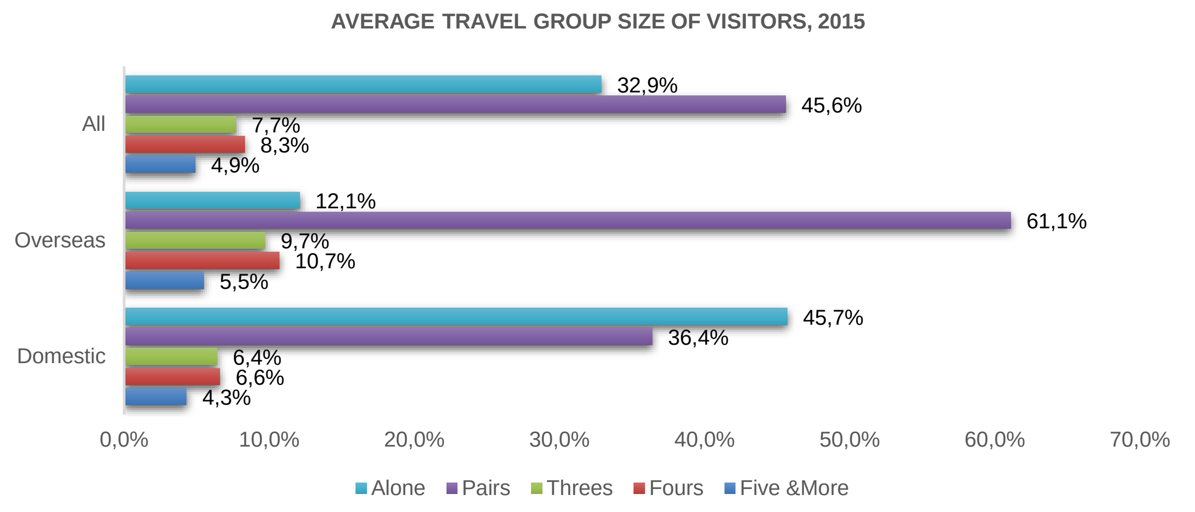
	All	Overseas	Domestic
Hotel	12,3%	16,1%	6,8%
Guesthouse	9,0%	11,9%	4,5%
B&B	14,4%	15,7%	12,7%
Self-Catering	22,0%	11,4%	36,6%

The majority of all visitors preferred to spend R201-R500, overseas and domestic visitors preferred to spend R501-R1000 on accommodation.



2.6 Travel group size

The majority of all visitors, overseas and domestic enjoyed travelling as pairs likely as couples and many other visitors also enjoyed travelling alone, which could be business tourists attending meetings.



2.7 Main purpose of visit

MAIN PURPOSE OF VISIT, 2015			
Purpose of visit	**ALL**	**OVERSEAS**	**DOMESTIC**
Holiday/Leisure	93.0%	98.5%	89.5%
Business	3.7%	0.3%	5.9%
Events/festivals	0.7%	-	1.3%
Education	1.4%	-	2.3%

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

2.8 Key trends: Holiday/Leisure Traveller

KEY TRENDS AND PATTERNS BY VISITOR TYPE, 2015	
Visitor Profile	**Holiday/Leisure Traveller**
% Share of overseas visitors	28.4%
% Share of domestic visitors	70.4%
Top international markets	Germany (31.6%)
	United Kingdom (22.9%)
	Netherlands (8.7%)
Top domestic markets	Western Cape (71.3%)
	Gauteng (15.5%)
	Eastern Cape (4.9%)
Most common travel group size	Pairs (40.2%)
	Alone (38.2%)
Most common age group	21-35 years (35.3%)
Most common length of stay per town	1 night (28.0%)
	2 nights (29.1%)
	3 nights (15.6%)
Most common mode of transport	Rented car (55.6%)
	Own motor vehicle (38.7%)
Top information sources	Internet/websites (38.4%)
	Word of mouth (36.2%)
Most common type of accommodation	Self-Catering (33.9%)
	B&B (22.4%)
Average spend on accommodation	R501-R1000 (42.6%)
Average daily spend	R201-R500 (43.9%)
Top three activities	Culture & Heritage (12.4%)
	Scenic drives (23.5%)
	Outdoor activities (14.6%)

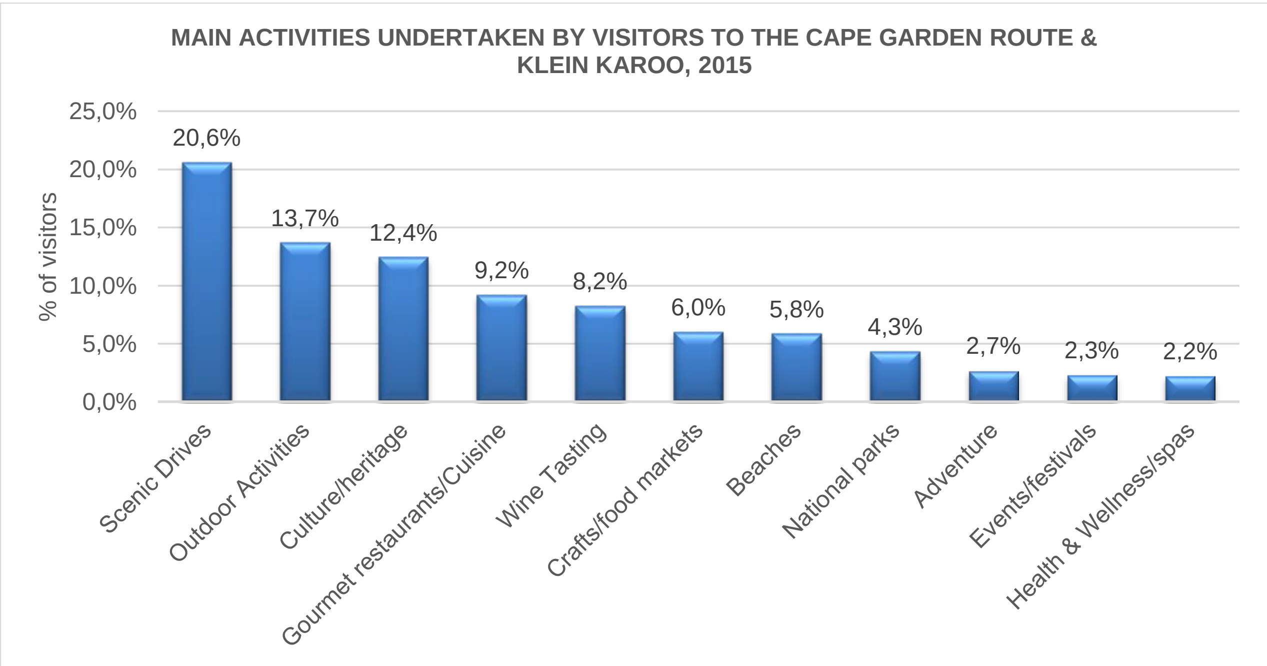
2.9 Key trends: Overnight and Day Visitor

KEY TRENDS AND PATTERNS BY VISITOR TYPE, 2015		
Visitor Profile	**Overnight Visitor**	**Day Visitor**
% share of overseas visitors	47.2%	12.1%
% share of domestic visitors	51.1%	87.2%
Top international markets	Germany (9.2%)	Germany (3.8%)
	United Kingdom (7.5%)	United Kingdom (1.6%)
	Netherlands (4.8%)	Netherlands (1.3%)
Top domestic markets	Western Cape (57.3%)	Western Cape (88.1%)
	Gauteng (22.2%)	Gauteng (5.4%)
	Eastern Cape (8.3%)	Eastern Cape (2.4%)
Most common travel group size	Pairs (52.9%)	Alone (55.8%)
Most common age group	21-35 (38.1%)	36-50 (30.6%)
Most common mode of transport	Rented Car (58.7%)	Rented Car (41.9%)
Top information sources	Internet/websites (39.3%)	Word of mouth (51.0%)
Most common type of accommodation	Self-catering (34.5%)	-
Average spend on accommodation	R501-R1000 (40.9%)	-
Average daily budget	R201-R500 (45.8%)	R501-R1000 (48.9%)
Top three activities	Culture/heritage (12.0%)	Wine tasting (13.1%)
	Scenic drives (20.1%)	Culture/heritage (12.4%)
	Outdoor activities (15.9%)	Scenic drives (32.6%)

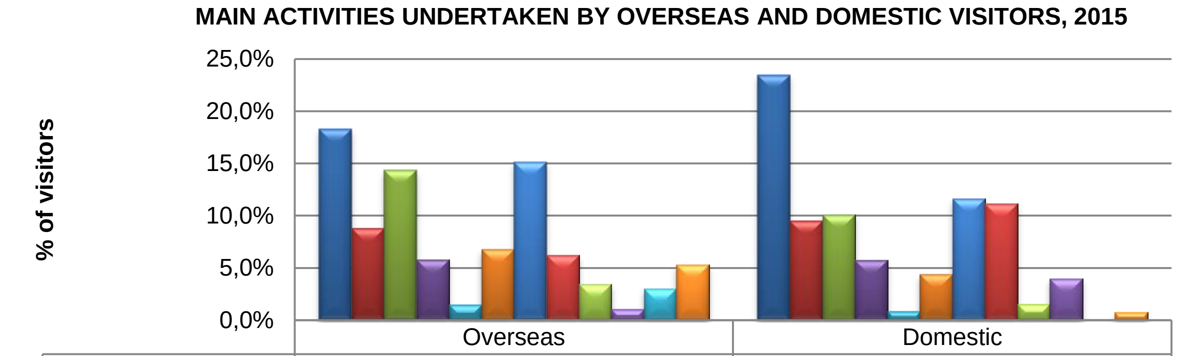
Note: Blank cells indicate that the sample was not big enough for a valid statistical interpretation.

2.10 Main activities undertaken in the Cape Garden Route & Klein Karoo

The top five activities undertaken by visitors to the Cape Garden Route & Klein Karoo was scenic drives (20.6%), outdoor activities (13.7%), culture & heritage (12.4%), gourmet restaurants/cuisine (9.2%) and wine tasting (8.2%).



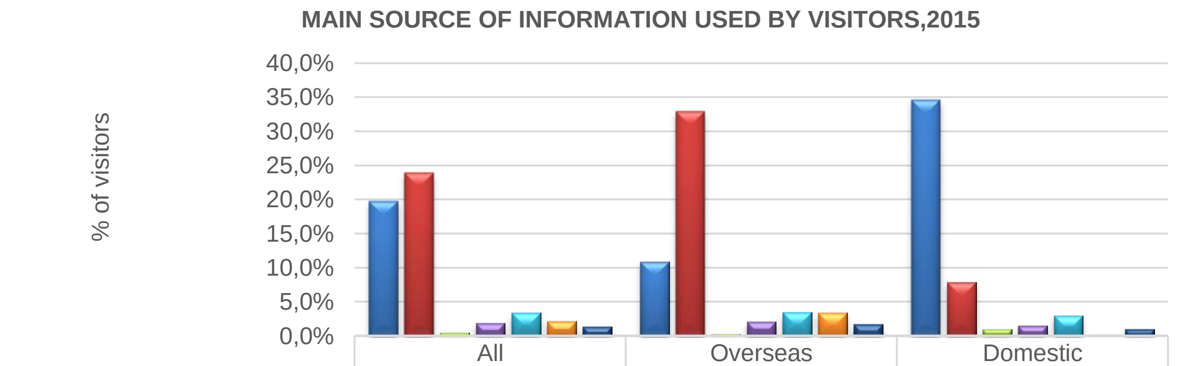
The main activities by both overseas and domestic visitors were scenic drives, culture & heritage and outdoor activities.



	Overseas	Domestic
Scenic Drives	18,3%	23,5%
Gourmet restaurants	8,8%	9,5%
Culture/heritage	14,3%	10,1%
Crafts/food markets	5,8%	5,8%
Golf	1,5%	0,9%
Beaches	6,8%	4,4%
Outdoor Activities	15,1%	11,6%
Wine Tasting	6,2%	11,2%
Adventure	3,4%	1,5%
Shopping	1,1%	3,9%
Ostrich Farms	3,0%	0,1%
National parks	5,3%	0,8%

2.11 Information Sources

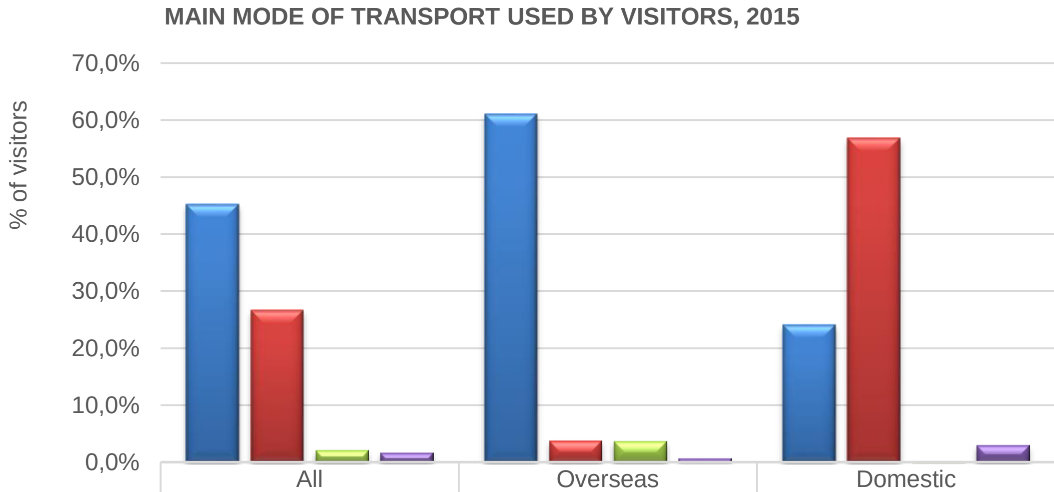
The main source of information amongst all, overseas and domestic visitors were word of mouth and internet/websites.



	All	Overseas	Domestic
Word of mouth	19,7%	10,9%	34,6%
Internet/websites	23,9%	32,9%	7,9%
Tv/Radio	0,5%	0,3%	1,0%
Books/magazines	1,9%	2,1%	1,5%
Brochures	3,4%	3,5%	3,0%
Travel Agent/tour operator	2,2%	3,4%	0,2%
Social Media	1,4%	1,7%	1,0%

2.12 Main mode of transport

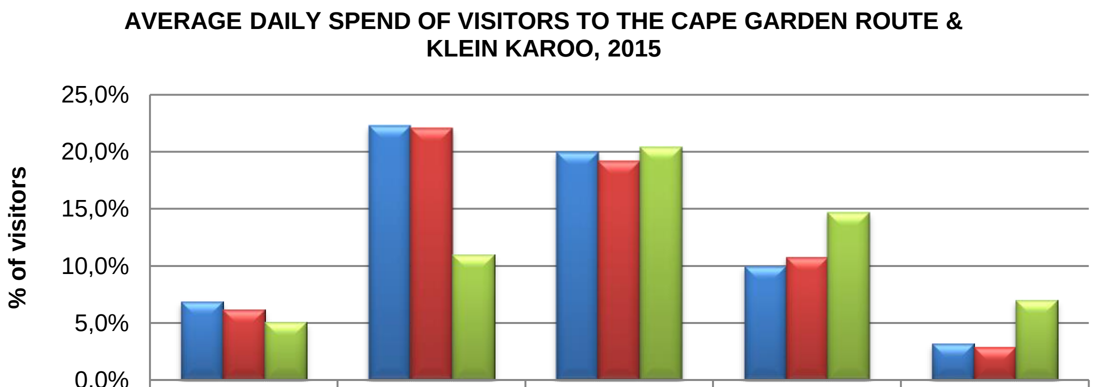
The main mode of transport for overseas visitors was rented cars and domestic visitors mainly used their own motor vehicle. Overseas visitors also indicated cycling (3.7%) as mode of transport when visiting the region.



	All	Overseas	Domestic
Rented car	45,2%	61,1%	24,1%
Own Motor Vehicle	26,7%	3,8%	56,9%
Cycling	2,1%	3,7%	0,2%
Motorbike	1,7%	0,7%	3,0%

2.13 Average daily Spend

The majority of all (22.3%) and overseas (22.1%) visitors preferred spend R201-R500, domestic (20.4%) visitors indicated an average daily spend of R501-R1000.



	0-R200	R201-R500	R501-R1000	R1001-R2000	More than R2000
All	6,9%	22,3%	20,0%	10,0%	3,2%
Overseas	6,2%	22,1%	19,2%	10,8%	2,9%
Domestic	5,1%	11,0%	20,4%	14,7%	7,0%

3. Cape Garden Route & Klein Karoo Towns

OVERVIEW OF REGIONAL TOWNS VISITOR TRENDS AND PATTERNS, 2015			
TOURISM INDICATOR	**Knysna**	**George**	**Calitzdorp**
% Share overseas	54.9%	10.3%	90.4%
% Share domestic	42.5%	88.9%	-
Top international markets	United Kingdom (15.6%)	Germany (31.3%)	Germany (31.7%)
	Germany (14.1%)	United Kingdom (16.3%)	-
	Netherlands (12.5%)	-	-
Top domestic markets	Gauteng (28.4%)	Western Cape (87.8%)	Western Cape (68.2%)
	Western Cape (49.5%)	Gauteng (6.9%)	Gauteng (10.6%)
	-	Eastern Cape (1.6%)	Eastern Cape (11.1%)
Main purpose of visit	Holiday/leisure (79.3%)	Holiday/leisure (85.9%)	Holiday/leisure (90.9%)
	Honeymoon/weddings (11.5%)	Business (9.6%)	-
	-	Education (3.9%)	
Most common travel group size	Pairs (54.1%)	Alone (63.2%)	Pairs (67.6%)
	Fours (22.7%)	Pairs (24.0%)	Alone (14.9%)
Most common length of stay	2 nights (30.8%)	1 night (41.6%)	1 night (50.0%)
	3 nights (21.5%)	7 nights & more (22.6%)	2 nights (34.2%)
Most common mode of transport	Rented car (57.3%)	Rented car (35.0%)	Rented car (38.6%)
	Own Motor Vehicle (38.9%)	Own Motor Vehicle (55.0%)	Own Motor Vehicle (55.4%)
Top information sources	Word of mouth (41.4%)	-	Word of mouth (48.1%)
	Internet/websites (42.2%)		Internet/websites (48.1%)
Average daily spend	R501-R1000 (39.2%)	-	-
Type of accommodation	Self-catering (32.2%)	Self-catering (52.4%)	Self-catering (52.6%)
	B&B (20.9%)	-	B&B (32.9%)
Average spend on accommodation	R501-R1000 (40.6%)	-	-
Top three activities undertaken	Crafts/food markets (13.6%)	Culture/heritage (28.1%)	Scenic drives (30.7%)
	Outdoor activities (17.8%)	Scenic drives (15.6%)	Wine tasting (21.2%)
	Scenic drives (23.8%)	Outdoor activities (23.4%)	Health/Wellness (14.0%)

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

4. Trends and patterns by top international markets

OVERVIEW OF TRENDS AND PATTERNS BY TOP INTERNATIONAL MARKET, 2015		
TOURISM INDICATOR	United Kingdom	Germany
Main purpose of visit	Holiday/leisure (100.0%)	Holiday/leisure (98.9%)
Most common travel group size	Pairs (57.7%)	Pairs (59.5%)
	Alone (19.2%)	Threes (15.2%)
Most common age group	21-35 years (35.6%)	57-70 years (37.5%)
Most common length of stay	2 nights (36.4%)	1 night (25.9%)
	1& 3 nights (22.7% each)	2 nights (27.8%)
Most common mode of transport	Rented car (97.7%)	Rented car (76.9%)
Top information sources	Internet/websites (51.4%)	Word of mouth (28.6%)
		Internet/websites (42.9%)
Most common type of accommodation	B&B (38.7%)	-
Top three activities undertaken	Culture & Heritage (11.8%)	Culture & Heritage (17.5%)
	Outdoor activities (16.7%)	Scenic drives (16.7%)
	Scenic Drives (21.6%)	Outdoor activities (15.8%)

5. Trends and patterns by top domestic markets

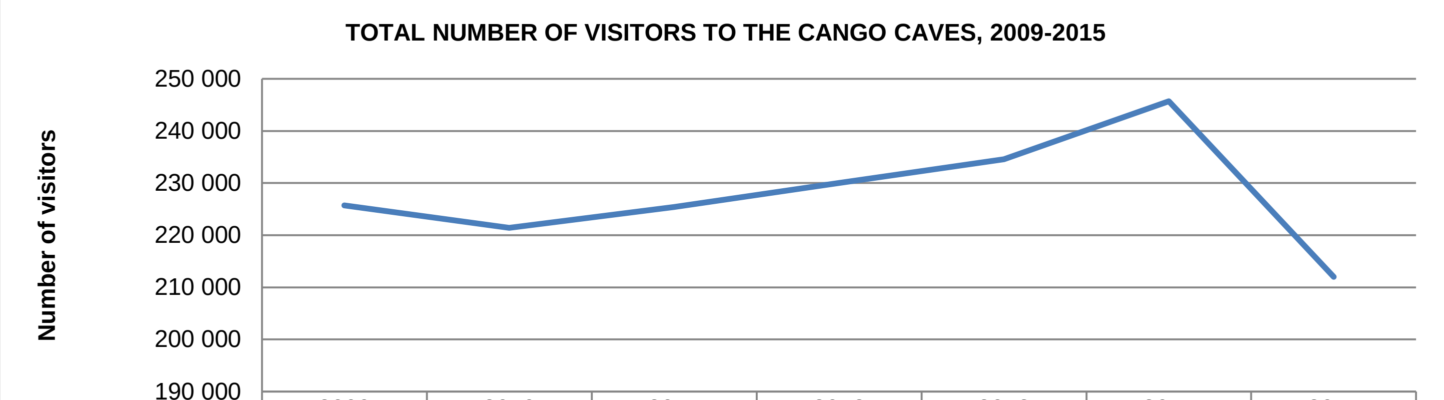
OVERVIEW OF TRENDS AND PATTERNS BY TOP DOMESTIC MARKET, 2015			
TOURISM INDICATOR	Western Cape	Gauteng	Eastern Cape
Main purpose of visit	Holiday/leisure (87.6%)	Holiday/leisure (88.0%)	Holiday/leisure (92.7%)
	Business (6.0%)	Business (7.0%)	
	Education (4.1%)		
Most common travel group size	Alone (54.6%)	Pairs (52.1%)	Alone (15.4%)
	Pairs (29.9%)	Alone (22.3%)	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 (7.7%)	-	Own motor vehicle (40.0%)
Top information sources	Internet/websites (14.1%)	Word of mouth (57.1%)	-
	Word of mouth (57.6%)		
Most common type of accommodation	Self-catering (50.8%)	Self-catering (57.5%)	Self-catering (68.8%)
	B&B (20.2%)		
Top three activities undertaken	Culture & Heritage (11.0%)	Crafts/food markets (11.5%)	Scenic drives & Outdoor activities (18.2% each)
	Scenic drives (28.0%)	Scenic drives (23.9%)	-
	Outdoor activities (11.3%)	Outdoor activities (12.4%)	

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

6. Cape Garden Route & Klein Karoo Attractions

6.1 Cango Caves

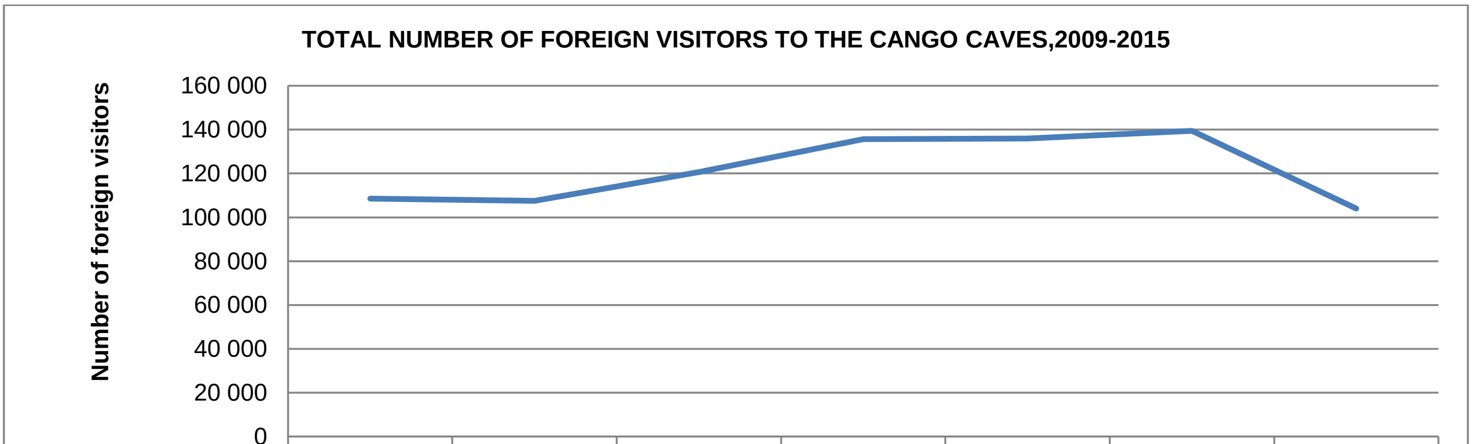
The Cango Caves recorded a total of 212,021 visitors in 2015. When compared to the previous year of 245,679 visitors there was slight decline in growth.



	2009	2010	2011	2012	2013	2014	2015
Total Visitors	225 737	221 430	225 435	230 044	234 563	245 679	212 021

Source: Cango Caves, 2016

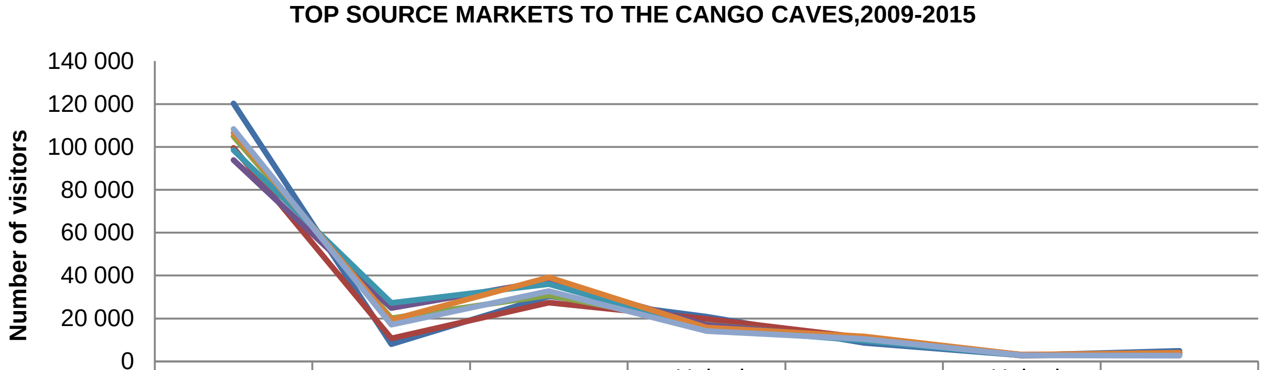
The Cango Caves received a total of 104,009 travellers in 2015. . When compared to the previous year of 139,009 visitors there was slight decline in growth.



	2009	2010	2011	2012	2013	2014	2015
Foreign Visitors	108 541	107 492	120 597	135 692	135 980	139 462	104 009

Source: Cango Caves, 2016

The core markets to the Cango Caves are shown in the figure below. The South African domestic travellers ranked as the leading market for the attraction, followed by Germany, India and the Netherlands.



	SA	India	Germany	United Kingdom	Netherlands	United States	France
2009	120 196	8 012	30 437	20 816	8 598	2 790	4 822
2010	99 544	10 708	27 319	19 751	10 991	2 645	4 000
2011	104 838	20 089	30 885	17 093	10 217	3 003	3 014
2012	93 842	24 918	37 645	17 011	10 424	3 126	3 908
2013	98 552	27 279	36 072	15 457	9 634	2 857	3 251
2014	106 457	19 368	39 200	15 740	11 639	3 032	3 919
2015	108 312	17 113	32 693	14 113	10 423	2 801	2 620

Source: Cango Caves, 2016

6.2 National Parks

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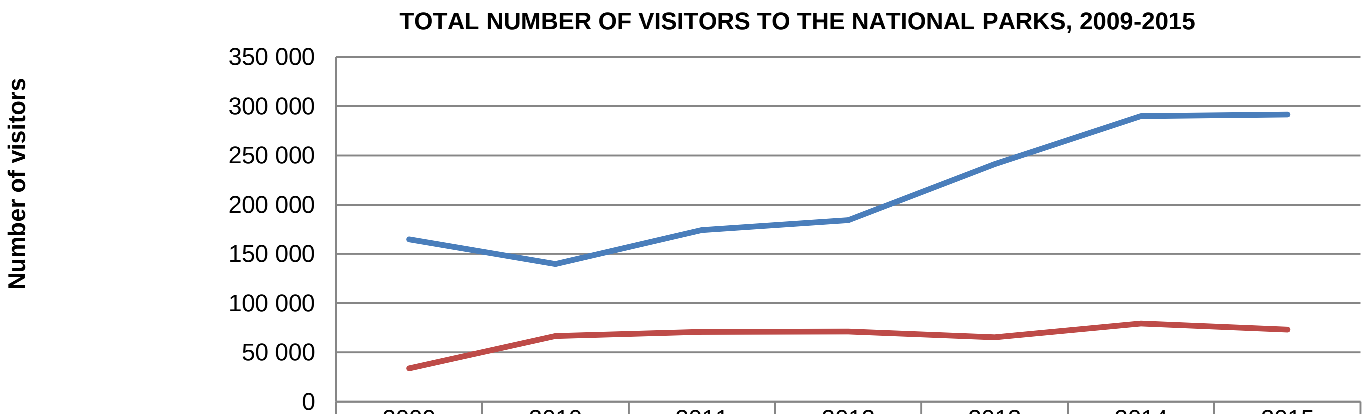
The Wilderness National Park recorded a total of 73,174 visitors in 2015, when compared to the previous year 79,384 there was slight decline. The Tsitsikamma National Park recorded a total of 291,394 visitors in 2015, when compared to the previous year 289,756 there was positive growth of 0.6%.



	2009	2010	2011	2012	2013	2014	2015
Tsitsikamma National Park	164 811	139 651	174 274	184 155	241 005	289 756	291 394
Wilderness National Park	33 910	66 661	70 722	71 019	65 303	79 384	73 174

South African National Parks, 2016

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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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