

# Cape Town & Western Cape



WESGRO

THE WESTERN CAPE DESTINATION MARKETING,  
INVESTMENT AND TRADE PROMOTION AGENCY –  
SOUTH AFRICA

## Western Cape Regional Tourism Visitor

### Trends

### Q2 (April- June) 2012

#### I. General Overview

##### *Global*

According to the September 2012 issue of the UNWTO World Tourism Barometer, international tourist arrivals increased with 5% in the first half of 2012, recording **467** million tourists. Globally, international tourist arrivals grew by more than 22 million between January and June 2012, from 445 million in the same period of the previous year.

##### *National*

The total tourist arrivals from April to June 2012 to South Africa were **2,148,566**, reflecting 10.5% growth when compared to the same period of the previous year. South Africa received the most visitors from Africa & the Middle East (1,634,212) followed by Europe (245,514).

##### *Regional*

The foot count is the number of walk-ins across the Western Cape and is comprised of visitors who came to the regional tourism offices to make bookings and to obtain general information about the destination. There were a total of **119,713** walk-ins in Q2 2012. The recording period was April (48,846), May (42,221) and June (28,646). Cape Town received 55,783 walk-ins, followed by Cape Winelands (21,500), Cape Garden Route & Klein Karoo (16,693), Cape Overberg (16,536), Cape West Coast (7,266) and Cape Karoo (1,935).

Of the visitors to the Western Cape, 67.2% were domestic visitors, followed by 30.4% who were from overseas, 1.1% originated from Africa (excluding domestic) and 1.3% did not indicate their country of origin. Of the overseas visitors, 6.6% were from the United Kingdom, followed by Germany (5.7%), United States (3.5%), the Netherlands (2.9%), France (1.7%) and Australia (1.7%). Of the domestic visitors, 44.5% were from the Western Cape, followed by Gauteng (9%), Eastern Cape (2.6%), KwaZulu-Natal (2.4%) and the Free State (1.5%).

Cape Town received the majority (70.8%) of overseas visitors, followed by Cape Winelands (46.4%), Cape Garden Route & Klein Karoo (31.5%), Cape Overberg (28.6%), Cape West Coast (7.5%) and Cape Karoo received 4.4% overseas visitors. The Cape Karoo welcomed the most (93.8%) domestic visitors, followed by Cape West Coast (91.5%), Cape Overberg (70.6%), Cape Garden Route & Klein Karoo (66%), Cape Winelands (50.8%) and Cape Town (21.3%). Cape Town received 4.2% visitors originating from Africa (excluding domestic), followed by Cape Winelands (1.1%).

In Q2 2012, the average travel group size to the Western Cape was three and the most common was two. Of the visitors to the Western Cape, 47.1% indicated that they stayed overnight, while 52.9% did not indicate their length of stay. The overall average length of stay of visitors was three nights,

The majority (79%) of visitors to the Western Cape travelled for holiday, followed by 5.8% who travelled for business, 2.4% attended events in and around the Western Cape, 2.3% explored the wine routes, 1.5% visited friends and relatives, 1.2% enjoyed the cuisine, 1.1% travelled to weddings and 2.1% travelled for various other reasons.

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### 3. Regional Visitor Trends

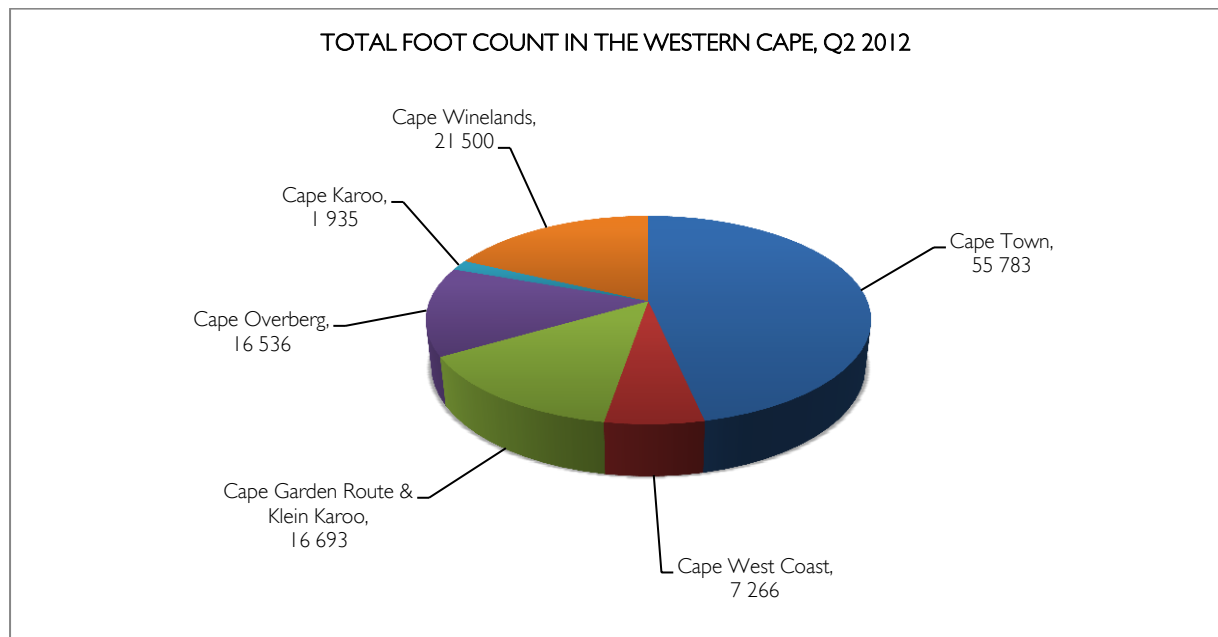
#### 3.1 Western Cape Trends Q2 2012

This section covers an analysis of Western Cape travel and tourism trends as well as the patterns of each region. This issue includes all six regions of the Western Cape: Cape Town, Cape Garden Route & Klein Karoo, Cape Winelands, Cape West Coast, Cape Karoo and Cape Overberg.



##### 3.1.1 Foot count

The foot count is the number of walk-ins across the Western Cape and is comprised of visitors who came to the regional tourism offices to make bookings and to obtain general information about the destination. There were a total of **119,713** walk-ins in Q2 2012. The recording period was April (48,846), May (42,221) and June (28,646). Cape Town received 55,783 walk-ins, followed by Cape Winelands (21,500), Cape Garden Route & Klein Karoo (16,693), Cape Overberg (16,536), Cape West Coast (7,266) and Cape Karoo (1,935).



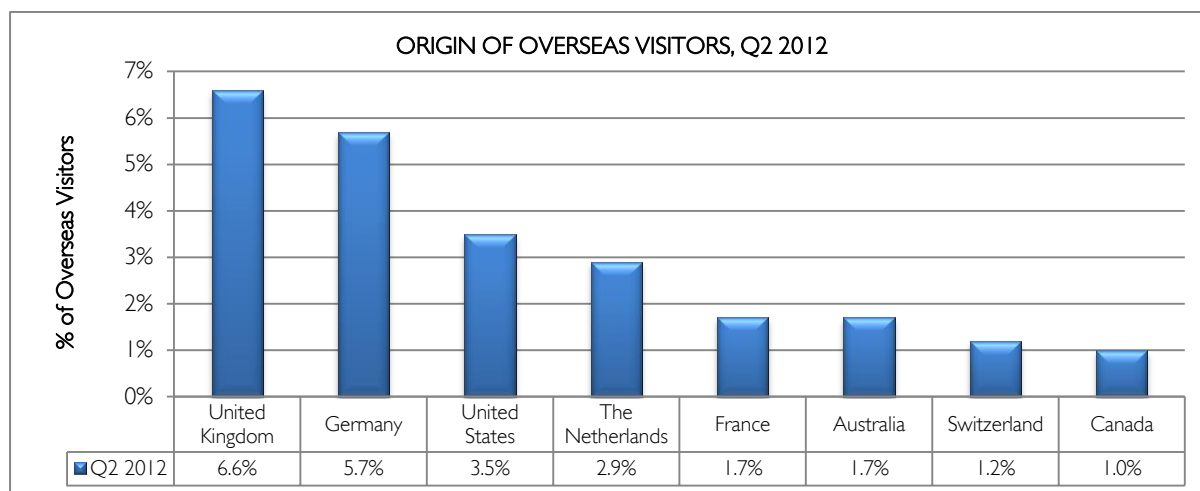
##### 3.1.2 Trends and Patterns

In Q2 2012, a total of **3,889** responses to the Regional Visitor Tracking Survey were received from the six regions, across the months of April (44.5%), May (31.9%) and June (23.5%).

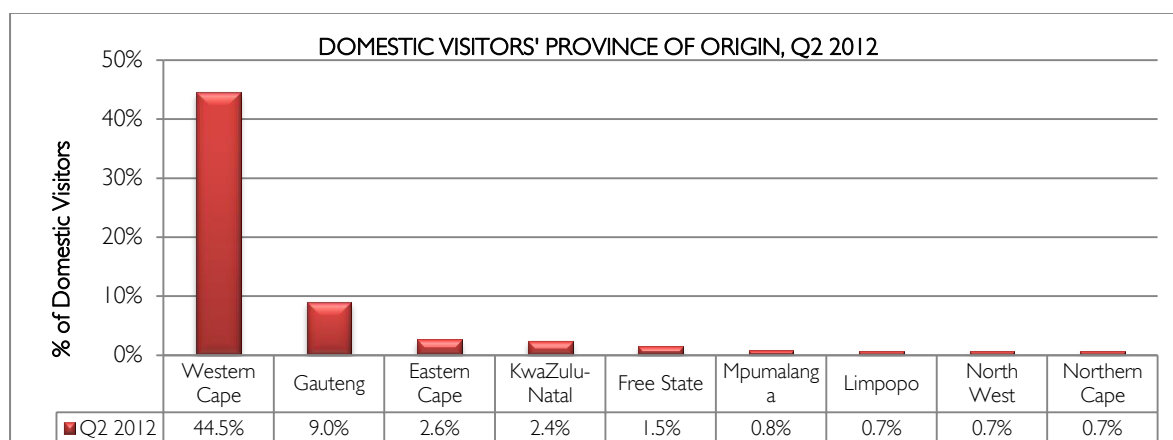
### 3.1.3 Origin of visitors

Of the visitors to the Western Cape, 67.2% were domestic, followed by 30.4% who were from overseas, 1.1% originated from Africa (excluding domestic) and 1.3% did not indicate their country of origin.

Of the overseas visitors, 6.6% were from the United Kingdom, followed by Germany (5.7%), United States (3.5%), the Netherlands (2.9%) and 1.7% (respectively) originated from France and Australia.



Of the domestic visitors, 44.5% were from the Western Cape, followed by Gauteng (9%), Eastern Cape (2.6%), KwaZulu-Natal (2.4%) and the Free State (1.5%).

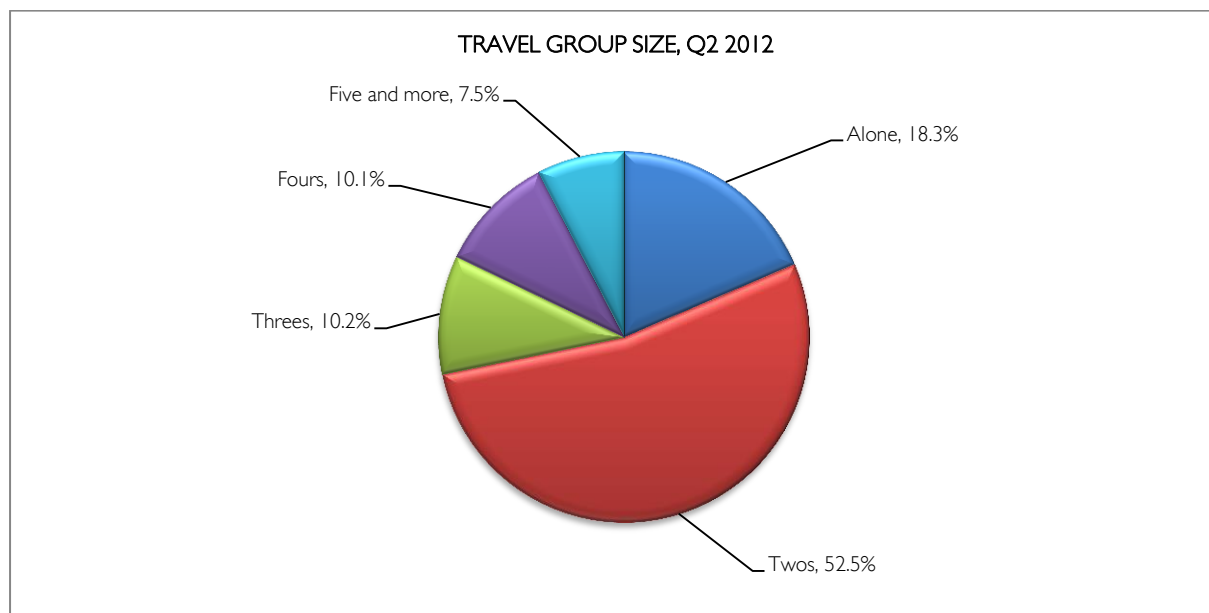


Cape Town received the majority (70.8%) of overseas visitors, followed by the Cape Winelands (46.4%), Cape Garden Route & Klein Karoo (31.5%), Cape Overberg (28.6%), Cape West Coast (7.5%) and the Cape Karoo received 4.4% overseas visitors. The Cape Karoo welcomed the most (93.8%) domestic visitors, followed by Cape West Coast (91.5%), Cape Overberg (70.6%), Cape Garden Route & Klein Karoo (66%), Cape Winelands (50.8%) and Cape Town (21.3%). Cape Town received 4.2% visitors originating from Africa (excluding domestic), followed by the Cape Winelands (1.1%).

DISTRIBUTION OF VISITORS BY REGION, Q2 2012			
REGION	OVERSEAS (%)	DOMESTIC (%)	AFRICA (EXCL DOMESTIC) (%)
Cape Town	70.8	21.3	4.2
Cape Garden Route & Klein Karoo	31.5	66.0	0.5
Cape Winelands	46.4	50.8	1.1
Cape West Coast	7.5	91.5	0.5
Cape Karoo	4.4	93.8	0.9
Cape Overberg	28.6	70.6	0.6

### 3.1.4 Travel group size and length of stay

In Q2 2012, the average travel group size to the Western Cape was three and the most common was two. Of these visitors, **52.5% travelled in pairs**, followed by 18.3% who travelled alone, 10.2% travelled in groups of three, 10.1% in groups of four, 7.5% in groups of five and more, and 1.4% did not indicate their travel group size.



Of the overseas visitors, the overall average travel group size was three. 12.9% travelled alone, 58.1% travelled in pairs, 9.9% in groups of three, 9.7% in groups of four and 5.7% travelled in groups of five and more.

The overall average travel group size among the domestic visitors was three. Of these visitors, 49.9% travelled in pairs, followed by 20.6% who travelled alone, 10.4% each travelled in groups of three and four, and 8.4% travelled in groups of five and more.

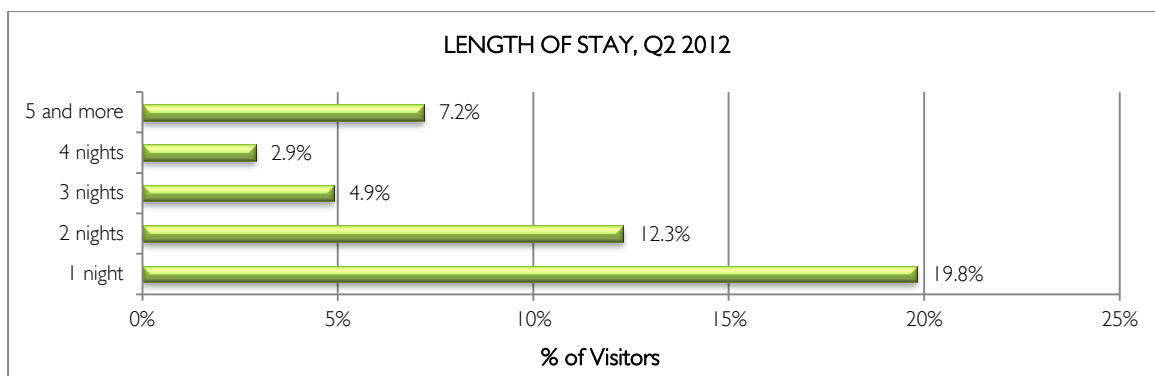
Of the visitors from Africa (excluding domestic), the overall average travel group size was two, of which 34.9% travelled alone, 46.5% travelled in pairs, 4.7% each travelled in groups of three and five, and 7% travelled in groups of four.

Of the visitors to the Western Cape, **47.1% indicated that they stayed overnight**, while 52.9% did not indicate their length of stay. The **overall average length of stay of visitors was three nights**, with 19.8% who stayed for one night, 12.3% for two nights, 4.9% for three nights, 2.9% for four nights and 7.2% stayed for five nights and more.

The average length of stay of the overseas visitors in the Western Cape was four nights. 61.1% of the overseas visitors indicated that they stayed overnight, of which 24.5% stayed for one night, 14.9% stayed for two nights, 5.2% for three nights, 4.1% for four nights and 12.4% stayed for five nights and more.

Among the domestic visitors, the overall average length of stay was three nights and 40.1% indicated that they stayed overnight in the Western Cape. 17.5% of the domestic visitors stayed for one night, 11.1% stayed for two nights, 4.6% for three nights, 2.4% for four nights and 4.5% stayed for five nights and more.

Of the visitors from Africa (excluding domestic), the overall average length of stay was three nights and 74.4% indicated that they stayed overnight, with 25.6% who stayed for one night, 18.6% for two nights, 9.3% for three nights, 2.3% for four nights and 18.6% stayed for five nights and more.



The table below illustrates the average group size and length of stay by region within the Western Cape. The average travel group size was three across almost all the regions. Cape Town enjoyed the highest (five nights) average length of stay, followed by Cape Garden Route & Klein Karoo (four nights), Cape West Coast, Cape Karoo and Cape Overberg achieved an average length of stay of three nights each, and the Cape Winelands enjoyed an average length of stay of two nights.

AVERAGE GROUP SIZE AND LENGTH OF STAY BY REGION, Q2 2012		
REGION	AVERAGE GROUP SIZE	AVERAGE LENGTH OF STAY
Cape Town	2.2	5.0
Cape Garden Route & Klein Karoo	2.7	3.8
Cape Winelands	3.0	2.4
Cape West Coast	2.2	2.6
Cape Karoo	3.4	3.2
Cape Overberg	2.7	2.5

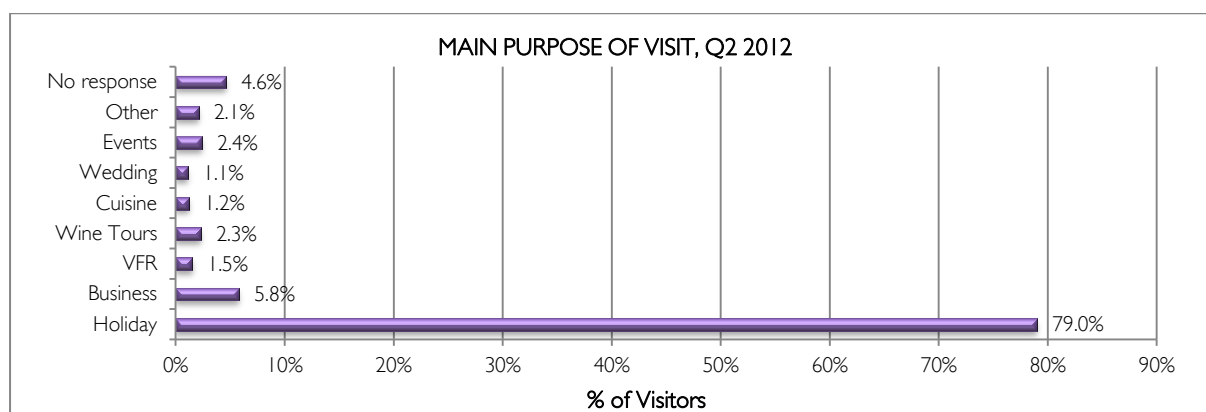
### 3.1.5 Main purpose of visit and mode of transport

The **79% of visitors to the Western Cape travelled for holiday**, followed by **5.8% who travelled for business**, 2.4% attended events in and around the Western Cape, 2.3% explored the wine routes, 1.5% visited friends and relatives, 1.2% enjoyed the cuisine, 1.1% travelled to weddings, 2.1% travelled for various other reasons and 4.6% did not indicate their purpose of visit.

Of the overseas visitors, 82.4% travelled for holiday, 4.4% explored the wine routes, 1.9% travelled for business, 1.7% visited friends and relatives, 1.4% enjoyed the cuisine on offer and 1.5% travelled for various other reasons.

Among the domestic visitors, 77.7% predominantly travelled for holiday, followed by 7.5% who travelled for business, 3.5% attended events, 1.5% each travelled to weddings and were residents seeking information, 1.3% visited friends and relatives and explored the wine routes (respectively), 1.2% enjoyed the cuisine and 1.1% travelled for other reasons.

76.7% of the visitors who originated from Africa (excluding domestic) travelled for holiday, followed by 11.6% who travelled for business and 2.3% each travelled to weddings and explored the wine tours on offer.



Of the visitors, 80.7% used a car as their main mode of transport, 2.9% travelled on foot, 2.2% travelled by bus, 2.1% used shuttle services, 2% used other modes of transport and 10.1% did not indicate their mode of transport.

Of the overseas visitors, 70.3% travelled by car, 4.8% utilised shuttle services, 4.7% travelled by bus, 1.9% travelled by taxi, 1.5% used public transport and 0.6% used other modes of transport. 86% of the domestic visitors travelled by car, followed by 4.1% who travelled on foot, 1% travelled by bus and 1.7% used other modes of transport. 48.8% of visitors from Africa (excluding domestic) travelled by car, 23.3% used shuttle services, 11.6% by taxi and 2.3% utilised public transport services.

### 3.1.6 General comments on the Western Cape

Visitors were asked to provide their overall comments on the Western Cape, with 22.8% who described the destination as great, 16.4% complimented the friendly and helpful services obtained at the respective tourism offices, 7.9% conveyed their thanks and appreciation, 4.3% provided good comments on the tourism products, 2% described their experience as excellent, 0.6% provided various other comments and 46% did not provide overall feedback.

## 4. Cape Town

### 4.1 Cape Town Trends

#### 4.1.1 Foot count

The foot count is the number of walk-ins received at the participating Cape Metropole Visitor Information Centres (VICs), which was a total of **55,783** in Q2 2012; which was for April (21,910), May (22,356) and June (11,517).

#### 4.1.2 Trends and patterns

A total of **455** responses were obtained through the Cape Town regional visitor surveys in Q2 2012, across the months of April (50.8%), May (28.6%) and June (20.7%). The responses were received from the following Visitor Information Centres (VICs):

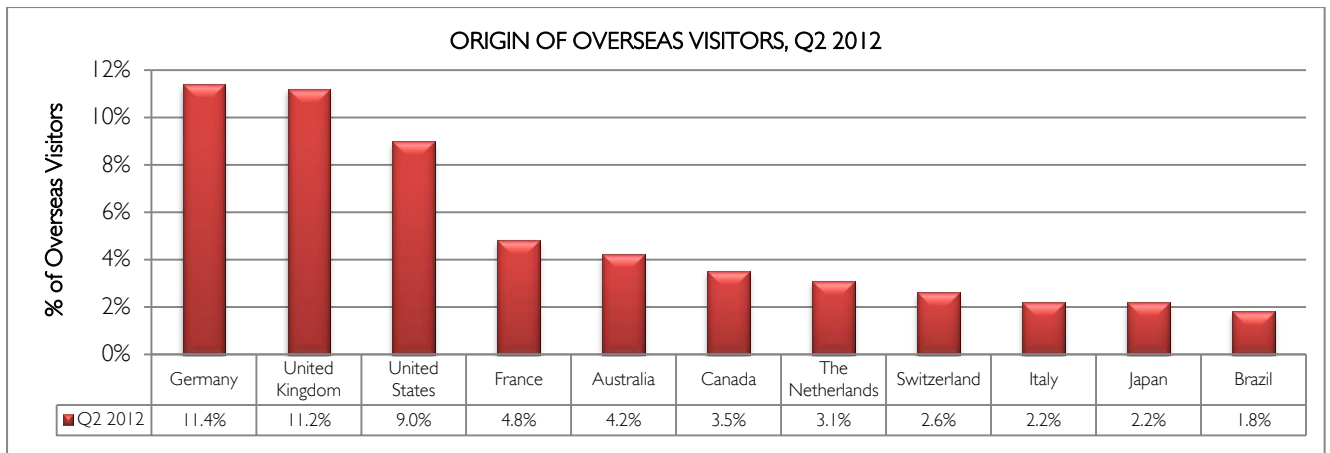
- Cape Town Burg Street (55.8%)
- Cape Town International Airport (21.3%)
- Gugulethu (0.2%)
- Hout Bay (3.5%)
- Langa (0.7%)
- Muizenberg (1.3%)
- Simons Town (9%)
- Somerset West (7%)
- Willowbridge (1.1%)

#### 4.1.3 Origin of visitors

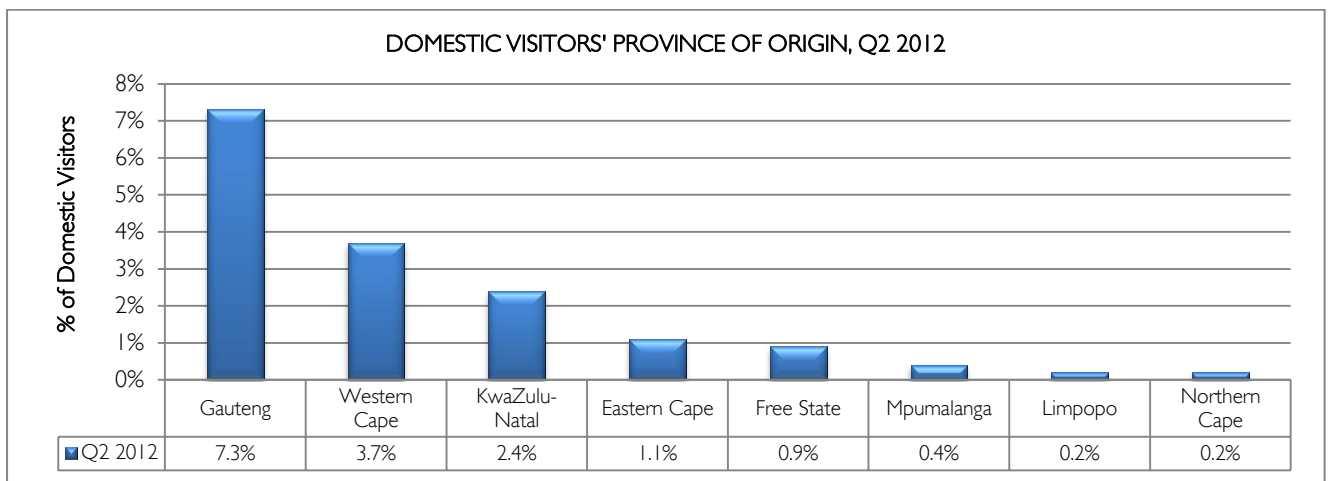
In Q2 2012, 70.8% of visitors to Cape Town were from overseas, followed by 21.3% who were domestic, 4.2% originated from Africa (excluding domestic) and 3.7% did not indicate their country of origin.

Among the overseas visitors, 11.4% were from Germany, followed by the United Kingdom (11.2%), the United States (9%), France (4.8%), Australia (4.2%), Canada (3.5%), the Netherlands (3.1%), and Switzerland (2.6%).



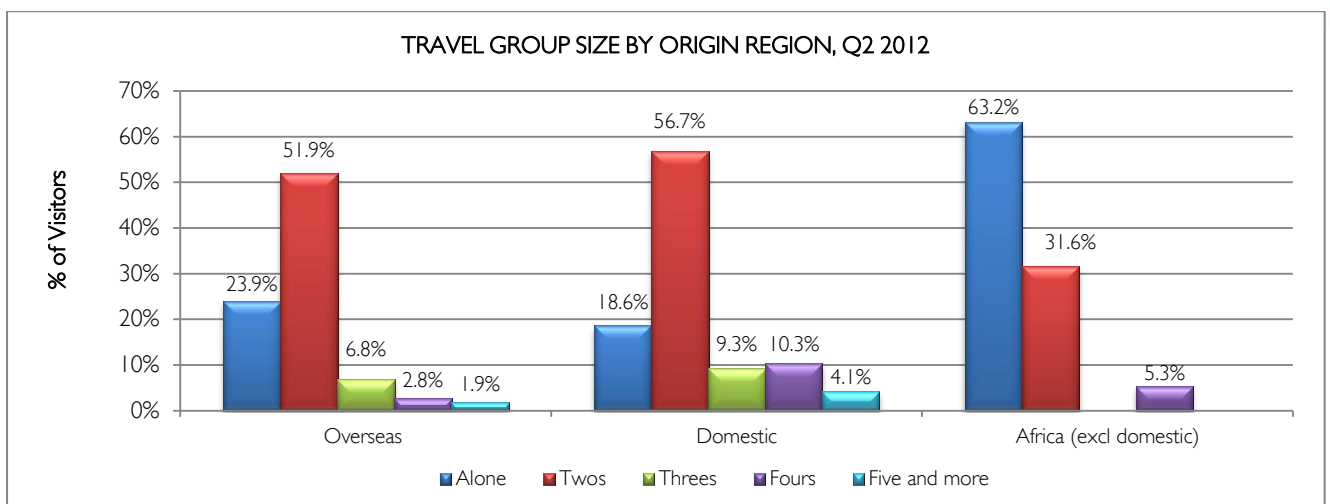


Of the domestic visitors, 7.3% were from Gauteng, followed by visitors who originated from Western Cape (3.7%), KwaZulu-Natal (2.4%), Eastern Cape (1.1%), Free State (0.9%), Mpumalanga (0.4%), 0.2% (each) were from Limpopo and Northern Cape, and 5.1% did not indicate their province of origin.



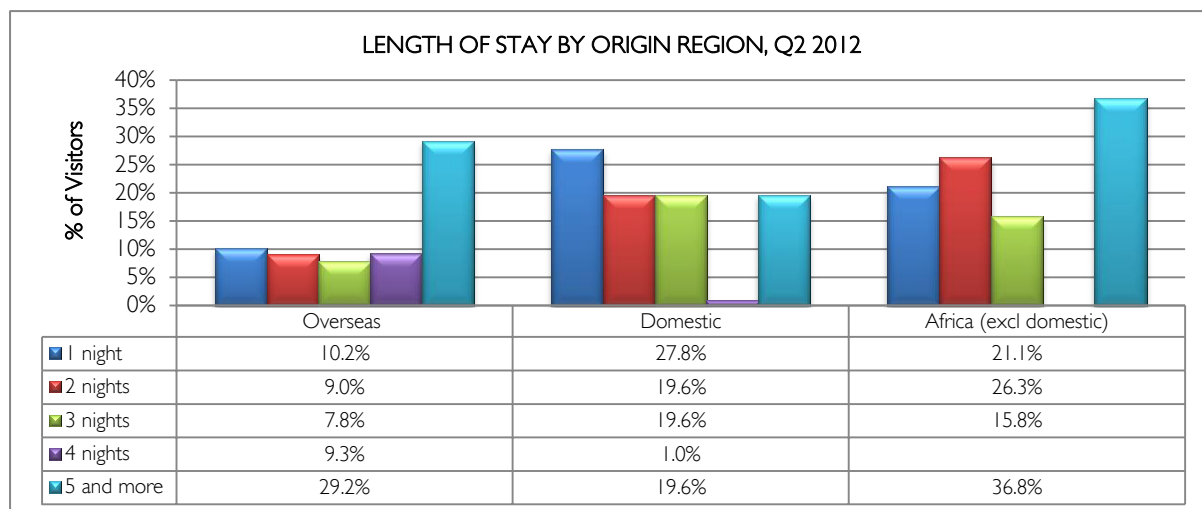
#### 4.1.4 Travel group size and length of stay

In Q2 2012, the overall average as well as most common travel group size to Cape Town was two. Of these visitors, 52.1% travelled in pairs, followed by 24.4% who travelled alone, 7% travelled in groups of three, 4.6% in groups of four, 2.2% in groups of five and more and 9.7% did not indicate their travel group size.



Of the overseas visitors, 23.9% travelled alone, 51.9% travelled in pairs, 6.8% in groups of three, 2.8% in groups of four and 1.9% in groups of five and more. Among the domestic visitors, 56.7% travelled in pairs, followed by 18.6% who travelled alone, 10.3% travelled in groups of four, 9.3% in groups of three and 4.1% in groups of five and more. 63.2% of the visitors from Africa (excluding domestic) travelled alone, followed by 31.6% who travelled in pairs and 5.3% travelled in groups of four.

The overall average length of stay in Cape Town was five nights and the most common was one night. 71.9% of these visitors indicated that they stayed overnight, with 14.5% who stayed for one night, 11.9% for two nights, 11.2% for three nights, 6.8% for four nights, 27.5% stayed for five nights and more and 28.1% did not indicate their length of stay.



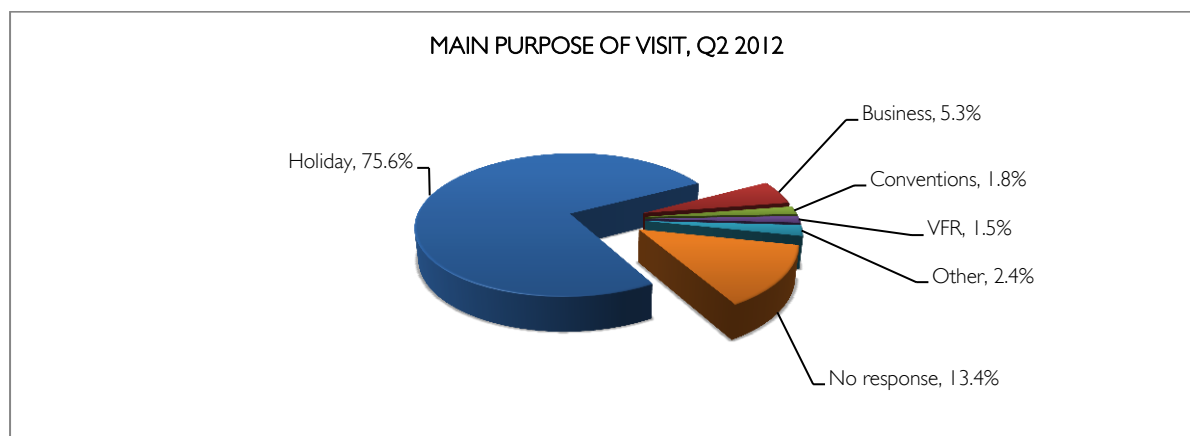
The overall average length of stay of the overseas visitors was six nights and 65.5% of the overseas visitors indicated that they stayed overnight in Cape Town, of which 10.2% stayed for one night, 9% for two nights, 7.8% for three nights, 9.3% for four nights and 29.2% stayed for five nights and more.

Among the domestic visitors, the overall average length of stay was three nights and 87.6% of the domestic visitors indicated that they stayed overnight. Of these visitors, 27.8% stayed for one night, 19.6% each stayed for two, three and five nights and more, and 1% stayed for four nights.

Of the visitors who originated from Africa (excluding domestic), the overall average length of stay was three nights and all respondents stayed overnight in Cape Town, with 21.1% who stayed for one night, 26.3% for two nights, 15.8% for three nights and 36.8% stayed for five nights and more.

#### 4.1.5 Main purpose of visit and mode of transport

The main purpose of visit to Cape Town was for holiday (75.6%), followed by 5.3% who travelled for business, 1.8% attended conventions, 1.5% visited friends and relatives, 2.4% travelled for various other reasons and 13.4% did not indicate their purpose of visit.



Of the overseas visitors, 78.3% travelled for holiday, followed by 2.5% who travelled for business, 1.6% visited friends and relatives, 1.2% attended conventions and 0.3% each travelled for education and religious purposes. Among the domestic visitors, 68% travelled for holiday, 12.4% for business, 4.1% were on honeymoon, 3.1% travelled to events and 4.2% travelled for various other reasons. 84.2% of visitors from Africa (excluding domestic) travelled for holiday and 15.8% for business.

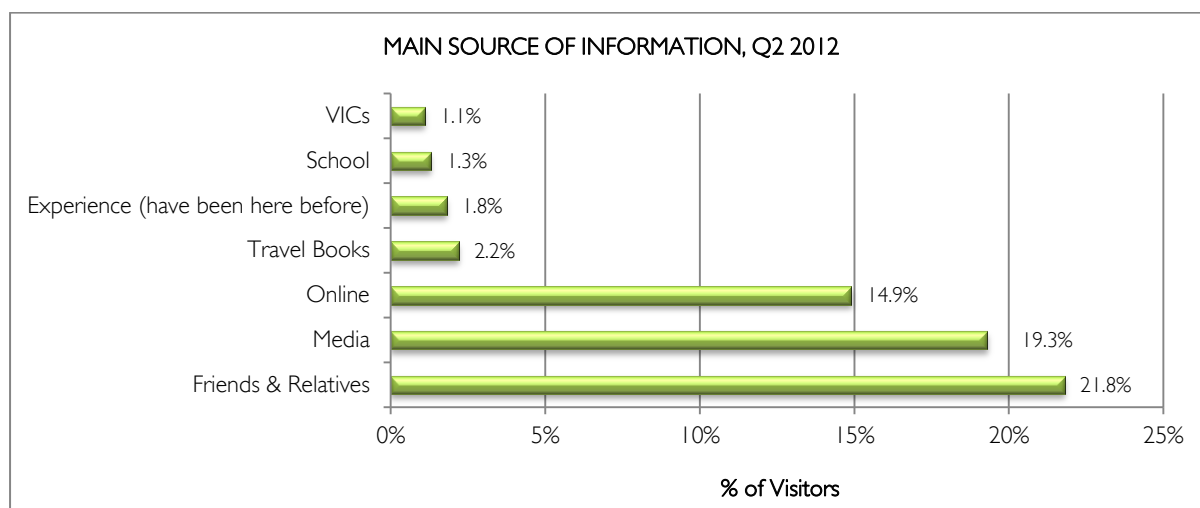
Of the visitors, 29% used a car as their main mode of transport, 17.6% used shuttle services, 4.6% used public transport, 7.7% travelled by taxi, 2% by bus, 0.7% on foot and 38.4% did not indicate their mode of transport.

22.4% of the overseas visitors travelled by car, 17.4% used shuttle services, 6.5% travelled by taxi, 5.6% used public transport and 2.2% travelled by bus. Among the domestic visitors, 53.6% travelled by car, 12.4% used shuttle services, 9.3% travelled by taxi and 2.1% used public transport. 52.6% of visitors from Africa (excluding domestic) utilised the shuttle services, 26.3% travelled by taxi and 5.3% respectively travelled by car and used public transport.

#### 4.1.6 Information source and average daily budget

Among the visitors, 21.8% heard about the destination through their friends and relatives, 19.3% through the media, 14.9% sourced information online, 2.2% explored travel books, 1.8% visited the destination on a previous occasion, 1.3% obtained information from school, 1.1% attained information from the VICs and 37.6% did not indicate their information source.

The average daily budget of visitors to the Cape Town region was **R957.75**.



#### 4.1.7 General comments about Cape Town

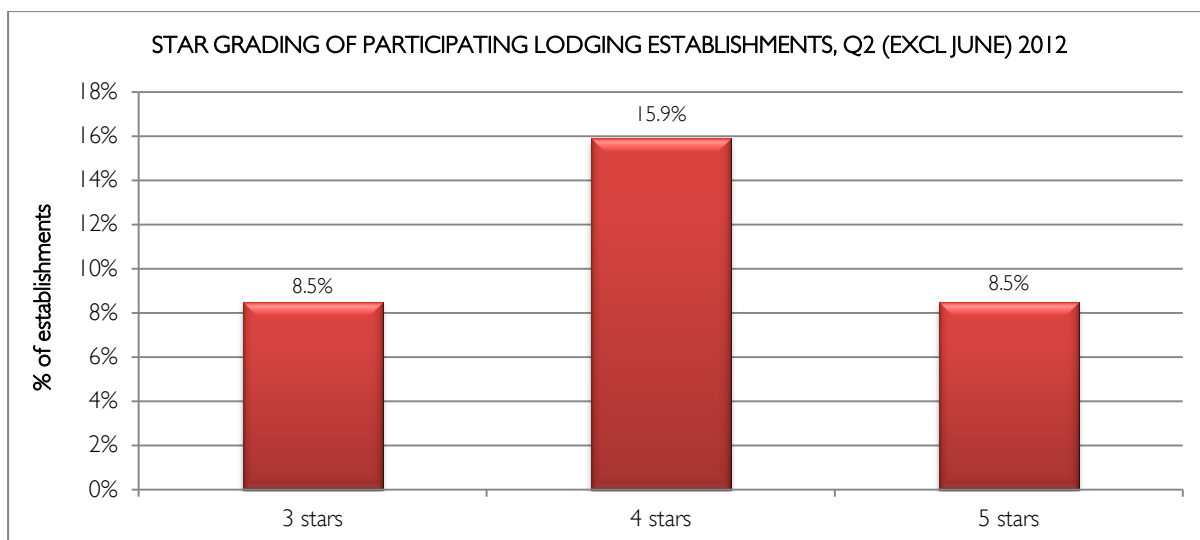
Of the respondents, 31.4% said they would like to hear about Cape Town and the Western Cape again, 33.4% said they would prefer not to and 35.2% did not provide an indication.

When asked whether they would return to the destination, 49.5% confirmed that they would return, 23.1% conveyed that they might, 4.2% said they would not and 23.2% did not comment.

When asked to provide overall comments on Cape Town, 16.7% provided good comments on the tourism products, 2.9% described the destination as great, 2.4% complimented the helpful and friendly service obtained at the respective tourism offices, 0.7% just arrived and was unable to provide a comment and 77.3% did not provide an indication of their overall experience.

## 4.2 Cape Town Lodging Statistics

A total of **164** responses were received from the Cape Town region in Q2 (excl June) 2012, across the months of April (50%) and May (50%). The participating lodging establishments were: guest houses (36.6%), self-catering (30.5%), hotels (18.3%), B&B's (9.8%), backpackers (3.7%) and lodges (1.2%). Establishments represented were from the following Cape Town sub-regions: Central (35.4%), North East (24.4%), South (22%) and Central Coastal (18.3%). Star grading by participating lodging establishments is illustrated in the figure below.



The summary for Q2 (excl June) 2012 lodging statistics for the Cape Town region is as follows:

- Average occupancy rate: 46.9%
- Average room rate achieved: R842.26
- RevPAR: R395.36
- Forward booking (July): 35.4%
- Forward booking (August): 36.2%
- Forward booking (September): 36.8%

Cape Town lodging statistics by month is illustrated in the table below. April received the highest average room rate (R925.86) as well as the highest occupancy rate (52.2%) in Q2.

CAPE TOWN LODGING STATISTICS BY MONTH, Q2 (EXCL JUNE) 2012		
MONTH	OCCUPANCY RATE (%)	AVERAGE ROOM RATE (R)
April	52.2%	R925.86
May	41.6%	R759.78

In the table below, lodging statistics by Cape Town sub-regions are illustrated. Cape Town Central Coastal achieved the highest occupancy rate (56.6%), and Cape Town Central the highest average room rate (R1092.19).

LODGING STATISTICS BY CAPE TOWN REGION, Q2 (EXCL JUNE) 2012						
Cape Town region	% Occupancy	Average room rate (R)	RevPAR (R)	% Forward booking 1 month	% Forward booking 2 months	% Forward booking 3 months
Central	47.9%	R1092.19	R523.27	38.5%	38.7%	42.0%
North East	45.0%	R526.63	R236.98	38.2%	35.3%	38.2%
South	39.5%	R806.20	R318.77	21.0%	23.0%	20.9%
Central Coastal	56.6%	R861.46	R487.76	41.5%	46.4%	43.0%

(\*May as benchmark month)

In the table below, the Q2 (excl June) 2012 lodging statistics are illustrated by category of establishment. Hotels received the highest average room rate (R1070.33) and backpackers received the highest occupancy rates (68.2%).

LODGING STATISTICS BY CATEGORY OF ESTABLISHMENT, Q2 (EXCL JUNE) 2012						
Category	% Occupancy	Average room rate (R)	RevPAR (R)	% Forward booking 1 month	% Forward booking 2 months	% Forward booking 3 months
Hotels	47.3%	R1070.33	R505.94	38.3%	39.1%	40.6%
Guesthouses	45.6%	R958.63	R436.75	29.9%	31.2%	32.1%
B&B's	42.6%	R434.29	R185.18	40.3%	36.0%	39.6%
Lodges	47.5%	R940.00	R446.50	25.0%	25.0%	35.0%
Self-Catering	47.0%	R717.00	R336.99	37.1%	40.2%	36.5%
Backpackers	68.2%	R105.00	R71.58	53.3%	48.3%	59.3%

(\*May as benchmark month)

The table below demonstrates the lodging statistics by Cape Town sub-regions and category of establishment. Guesthouses in Cape Town Central region achieved the highest average room rate (R1495.48) and backpacker establishments in the Cape Town Central Coastal region achieved the highest occupancy rate (71.8%) among the categories of establishments across the Cape Town regions.

LODGING STATISTICS BY CAPE TOWN REGION AND CATEGORY OF ESTABLISHMENT, Q2 (EXCL JUNE) 2012								
Category/Region	Cape Town Central		North East		South		Central Coastal	
	% Occupancy	Average room rate (R)	% Occupancy	Average room rate (R)	% Occupancy	Average room rate (R)	% Occupancy	Average room rate (R)
Hotels	57.7%	R1034.06	38.8%	R611.75	28.0%	R1381.25	-	-
Guesthouses	46.1%	R1495.48	47.5%	R574.88	43.1%	R685.64	45.3%	R740.00
B&B's	48.5%	R485.00	39.1%	R430.00	45.0%	R350.00	-	-
Lodges	47.5%	R940.00	-	-	-	-	-	-
Self-Catering	27.3%	R631.33	47.9%	R498.33	42.3%	R472.83	57.0%	R1004.69
Backpackers	61.0%	R130.00	-	-	-	-	71.8%	R80.00

#### 4.2.7 Cape Town Accommodation Performance Review and Forecast Report

Horwath HTL, on behalf of Cape Town Tourism, conducted a performance review and forecast study among respective accommodation establishments across June to July 2012. A total of 69 establishments participated in the study, of which 25% were located within the City Centre, 13% respectively in Helderberg and South Peninsula, 10% in the Northern Suburbs, 9% in Blaauwberg Coast, 7% in the Southern Suburbs, 4% along the Atlantic Seaboard and 1% from the Cape Flats area. The participating establishments included guesthouses (41%), hotels and self-catering (16% each), B&B's (7%), backpackers (1%) and lodges (1%).

The summary for June 2012 lodging statistics for Cape Town Region is as follows:

- Average occupancy rate: 46%
- Average room rate achieved: R884.00
- RevPAR: R414.00

In the table below, June 2012 lodging statistics by Cape Town sub-regions are illustrated. The Northern Suburbs achieved the highest occupancy rate (54%), and Cape Town City Centre the highest average room rate (R995.00).

LODGING STATISTICS BY CAPE TOWN REGION, JUNE 2012			
Cape Town region	% Occupancy	Average room rate (R)	RevPAR (R)
City Centre	45%	R995.00	R464.00
Blaauwberg Coast	52%	R701.00	R320.00
Helderberg	51%	R597.00	R304.00
South Peninsula	34%	R700.00	R237.00
Southern suburbs	49%	R834.00	R410.00
Northern suburbs	54%	R411.00	R224.00

Source: Cape Town Tourism, 2012

In the table below, the June 2012 lodging statistics are illustrated by category of establishment. Hotels received the highest average room rate (R947.00) and an occupancy rate of 46% each was enjoyed among the hotel and self-catering establishments.

LODGING STATISTICS BY CATEGORY OF ESTABLISHMENT, JUNE 2012			
Category	% Occupancy	Average room rate (R)	RevPAR (R)
B&B's	41%	R595.00	R244.00
Guesthouses	40%	R527.00	R210.00
Hotels	46%	R947.00	R456.00
Self-Catering	46%	R759.00	R304.00

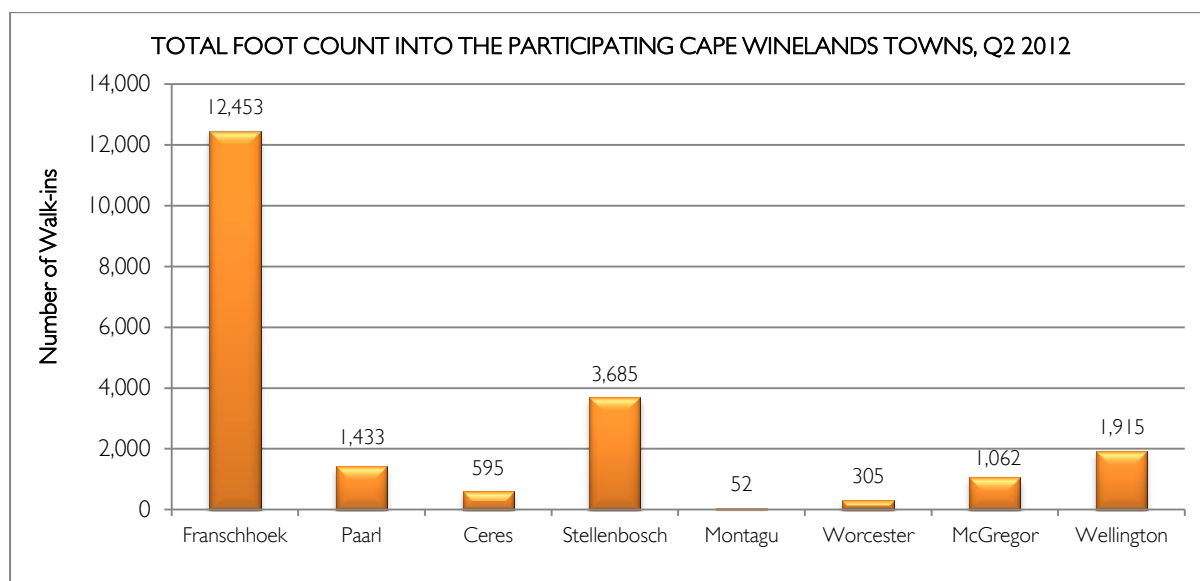
Source: Cape Town Tourism, 2012

## 5. Cape Winelands

### 5.1 Cape Winelands Trends

#### 5.1.1 Foot count

The foot count is the number of walk-ins received by the participating Cape Winelands towns, which was a total of **21,500** in Q2 2012: April (9,297), May (7,089) and June (5,114). Franschhoek received 12,453 walk-ins, followed by Stellenbosch (3,685), Wellington (1,915), Paarl (1,433), McGregor (1,062), Ceres (595), Worcester (305) and Montagu (52).



#### 5.1.2 Trends and patterns

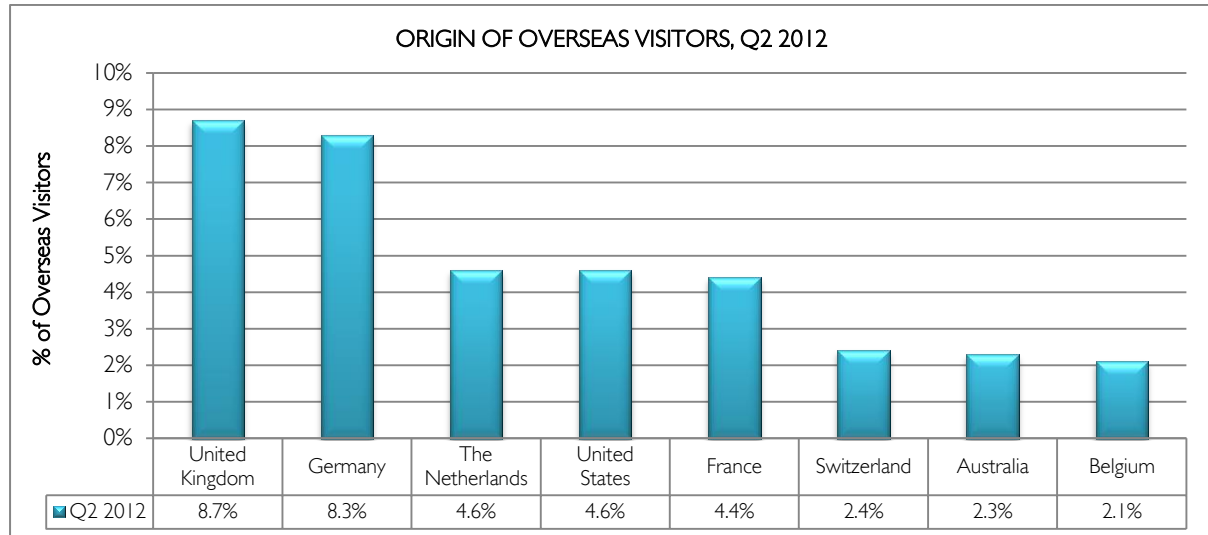
In Q2 2012, a total of **703** responses to the Regional Visitor Tracking Survey were obtained from the Cape Winelands, during the months of April (50.2%), May (30.4%) and June (19.3%). The participating towns were:

- Ceres (14.8%)
- Franschhoek (22.6%)
- Montagu (3.6%)
- Paarl (4.6%)
- Stellenbosch (18.2%)
- Tulbagh (36.3%)

### 5.1.3 Origin of visitors

In Q2 2012, 50.8% of visitors to the Cape Winelands were domestic, 46.4% were from overseas, 1.1% originated from Africa (excluding domestic) and 1.7% did not indicate their country of origin.

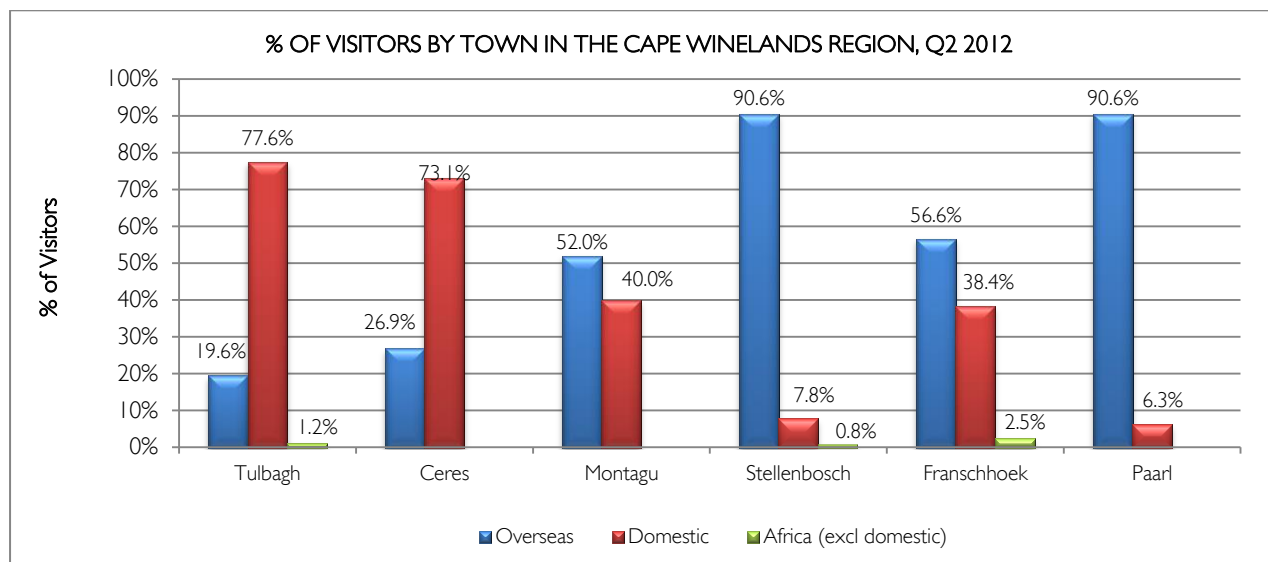
Of the overseas visitors, 8.7% were from the United Kingdom, followed by Germany (8.3%), the Netherlands and the United States (4.6% each), France (4.4%), and Switzerland (2.4%).



Stellenbosch and Paarl enjoyed the highest (90.6% respectively) share of overseas visitors in Q2 2012, followed by Franschhoek (56.6%), Montagu (52%), Ceres (26.9%) and Tulbagh (19.6%).

Tulbagh (77.6%) received the majority of domestic visitors, followed by Ceres (73.1%), Montagu (40%), Franschhoek (38.4%), Stellenbosch (7.8%) and Paarl (6.3%).

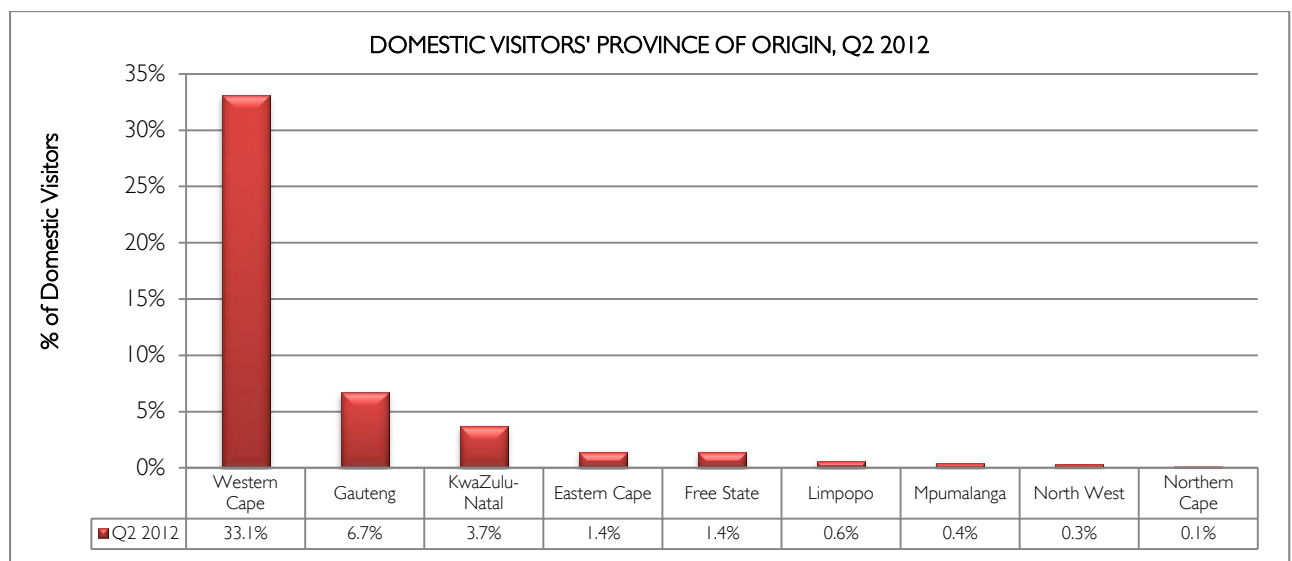
Franschhoek received 2.5% visitors from Africa (excluding domestic), followed by Tulbagh (1.2%) and Stellenbosch (0.8%).



As seen in the table below, South Africa, the United Kingdom and Germany dominated as the top source markets across all the participating Cape Winelands towns. Ceres received visitors from France, Switzerland and Mauritius, Stellenbosch and Franschhoek received visitors from the Netherlands and Montagu and Paarl received visitors from Australia.

TOP THREE SOURCE COUNTRIES FOR EACH OF THE PARTICIPATING CAPE WINELANDS TOWNS, Q2 2012						
RANK	TULBAGH	CERES	MONTAGU	STELLENBOSCH	FRANSCHOEK	PAARL
First	South Africa (77.6%)	South Africa (73.1%)	South Africa (40%)	United Kingdom (15.6%)	South Africa (38.4%)	Germany (31.3%)
Second	Germany (5.1%)	United Kingdom (3.8%) Germany (3.8%) France (3.8%)	United Kingdom (8%) United States (8%) Switzerland (8%)	Germany (14.8%)	United Kingdom (11.3%)	United Kingdom (25%)
Third	United States (3.9%)	Switzerland (2.9%) Mauritius (2.9%)	Germany (4%) France (4%) Netherlands (4%) Belgium (4%) Finland (4%) Australia (4%) Spain (4%)	Netherlands (10.9%) France (10.9%)	Germany (6.9%) Netherlands (6.9%)	Australia (9.4%)

Of the domestic visitors, 33.1% were from the Western Cape, followed by Gauteng (6.7%) and KwaZulu-Natal (3.7%), 1.4% was from the Eastern Cape and Free State (each), 0.6% from Limpopo, 0.4% from Mpumalanga, 0.3% from North West and 0.1% were from the Northern Cape.



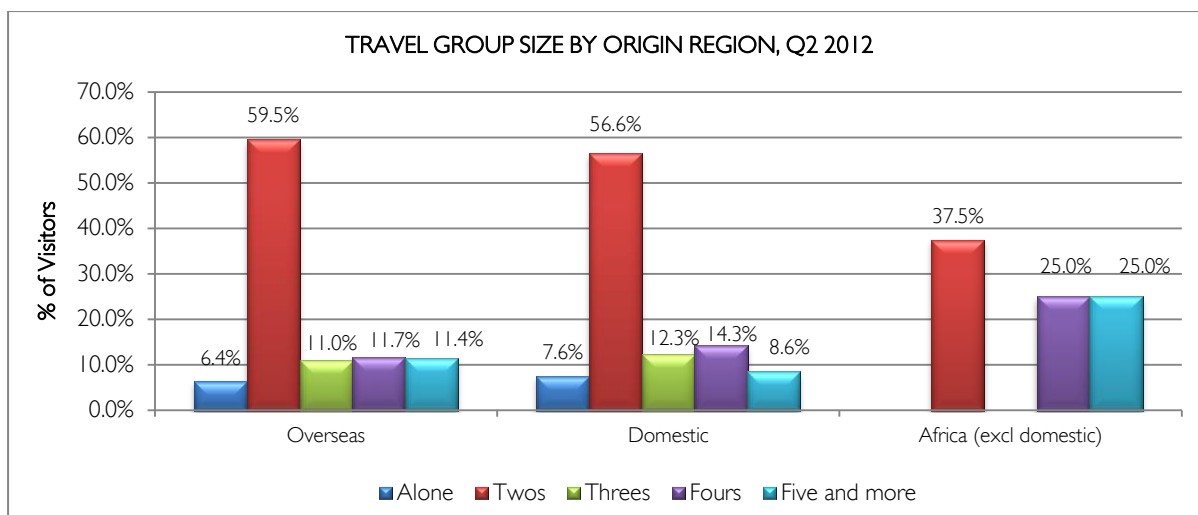
The table below illustrates the top three provinces from which visitors to the Cape Winelands originated. Western Cape and Gauteng dominated as the top provinces across the participating Cape Winelands towns.

TOP THREE PROVINCES FROM WHICH VISITORS TO THE CAPE WINELANDS ORIGINATED, Q2 2012						
RANK	TULBAGH	CERES	MONTAGU	STELLENBOSCH	FRANSCHOEK	PAARL
First	Western Cape (56.9%)	Western Cape (47.1%)	Western Cape (36%)	Gauteng (2.3%)	Western Cape (17%)	Western Cape (6.3%)
Second	Gauteng (6.7%)	Gauteng (9.6%)	Gauteng (4%)	Western Cape (0.8%)	Gauteng (10.1%)	-
Third	KZN (6.3%)	KZN (5.8%)	-	-	Free State (3.8%)	-

#### 5.1.4 Travel group size and length of stay

The overall average travel group size to the Cape Winelands was three and the most common was two. Of these visitors, 6.8% travelled alone, 58.2% travelled in pairs, 11.7% in groups of three, 12.9% in groups of four, 10% travelled in groups of five and more and 0.4% did not indicate their travel group size.

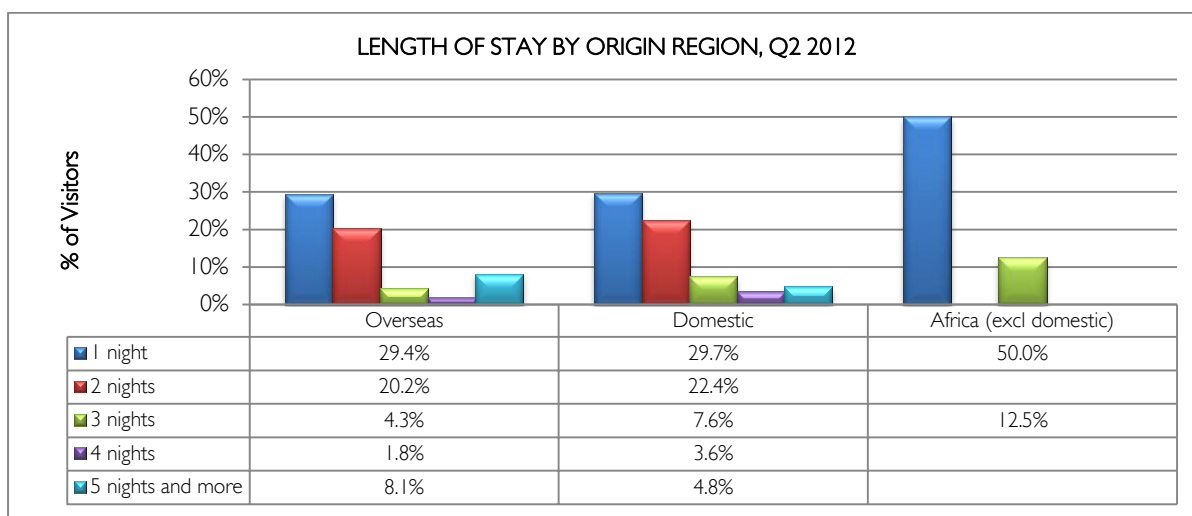




Of the overseas visitors, the overall average travel group size was three and the most common was two. Of these visitors, 6.4% travelled alone, 59.5% travelled in pairs, 11% travelled in groups of threes, 11.7% in groups of four and 11.4% in groups of five and more.

Among the domestic visitors, the average travel group size was three, of which 56.6% travelled in pairs, followed by 14.3% who travelled in groups of four, 12.3% in groups of three, 8.6% in groups of five and more and 7.6% travelled alone.

The overall average travel group size among the visitors from Africa (excluding domestic) was three, of these visitors, 37.5% travelled in pairs and 25% each travelled in groups of four and five and more.



The overall average length of stay in the Cape Winelands was two nights and the most common was one night. Of these visitors, 66% indicated that they stayed overnight, of which 29.7% stayed for one night, 20.9% for two nights, 6.4% for three nights, 2.7% for four nights, 6.3% stayed for five nights and more and 34% did not indicate their length of stay.

The average length of stay of the overseas visitors was three nights and the most common was one night. 63.8% of the overseas visitors stayed overnight in the region, of which 29.4% stayed for one night, 20.2% for two nights, 4.3% for three nights, 1.8% for four nights and 8.1% for five nights and more.

Among the domestic visitors, the average length of stay recorded was two nights and the most common was one night. 68.1% of the domestic visitors indicated that they stayed overnight in the region, of which 29.7% stayed for one night, 22.4% stayed for two nights, 7.6% for three nights, 3.6% for four nights and 4.8% stayed for five nights and more.

The average as well as most common length of stay of visitors who originated from Africa (excluding domestic) was one night. 62.5% of these visitors stayed overnight, with 50% who stayed for one night and 12.5% for three nights.

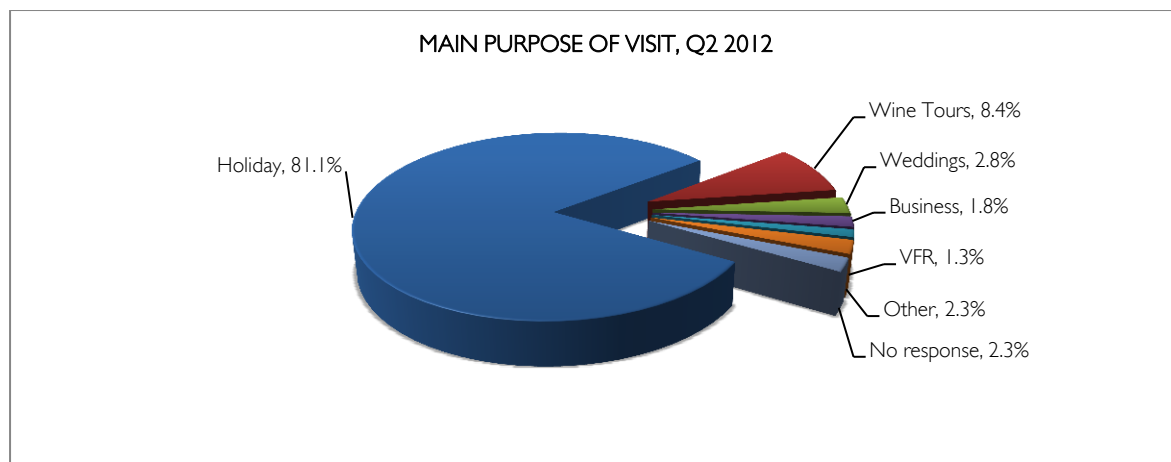
AVERAGE GROUP SIZE AND AVERAGE LENGTH OF STAY (NUMBER OF NIGHTS) IN THE CAPE WINELANDS, Q2 2012						
TOWN	AVERAGE GROUP SIZE			AVERAGE LENGTH OF STAY		
	OVERSEAS	DOMESTIC	ALL	OVERSEAS	DOMESTIC	ALL
Tulbagh	2.7	2.8	2.7	2.2	1.9	2.0
Ceres	2.4	2.6	2.5	3.3	2.1	2.3
Montagu	2.2	2.3	2.2	1.6	3.9	2.5
Stellenbosch	4.6	6.0	4.7	3.2	1.3	3.2
Franschhoek	2.7	2.6	2.7	2.4	2.7	2.5
Paarl	2.1	2.0	2.1	4.3	2.0	4.0

As seen above, Paarl enjoyed the highest (four nights) average length of stay, followed by Franschhoek, Stellenbosch and Montagu who each enjoyed an average length of stay of three nights, and Tulbagh and Ceres enjoyed an average length of stay of two nights respectively.

### 5.1.5 Main purpose of visit and mode of transport

Of the visitors to the Cape Winelands, most (81.1%) travelled for holiday, followed by 8.4% who explored the wine routes, 2.8% travelled to weddings, 1.8% travelled for business, 1.3% visited friends and relatives and 2.3% each travelled for various other reasons and did not indicate their purpose of visit.

Of the overseas visitors, 77.3% travelled for holiday, 14.4% explored the wine routes, 1.8% travelled for business, 1.5% visited friends and relatives and 2.5% travelled for various other reasons. Among the domestic visitors, 84.9% travelled for holiday, 4.5% to weddings, 3.1% enjoyed the wine tours, 2% travelled for business and 4.1% travelled for other reasons. 62.5% of visitors from Africa (excluding domestic) travelled for holiday, followed by 12.5% each who travelled to weddings and who enjoyed the wine tours on offer in the region.



As seen in the table below, most visitors to the Cape Winelands region travelled for holiday, Paarl received 6.3% who travelled for business, 5.9% of visitors travelled to Tulbagh for weddings and Stellenbosch welcomed 20.3% of visitors who explored the wine tours, followed by Franschhoek (17%) and Paarl (9.4%).

MAIN PURPOSE OF VISIT TO THE CAPE WINELANDS, Q2 2012				
TOWN	HOLIDAY	BUSINESS	WEDDINGS	WINE TOURS
Tulbagh	89.4	0.8	5.9	1.2
Ceres	93.3	3.8	-	-
Montagu	80.0	-	-	-
Stellenbosch	75.0	1.6	-	20.3
Franschhoek	66.7	1.9	3.1	17.0
Paarl	71.9	6.3	-	9.4

Of the visitors, almost all (93%) used a car as their main mode of transport, followed by 2.7% who travelled by bus, 0.6% used other modes of transport and 3.7% did not indicate their mode of transport. Of the overseas visitors, 89.6% travelled by car and 5.2% by bus. Among the domestic visitors, 96.4% travelled by car and 1.6% used other modes of transport. 87.5% of visitors from Africa (excluding domestic) travelled by car.

### 5.1.6 General comments about the Cape Winelands

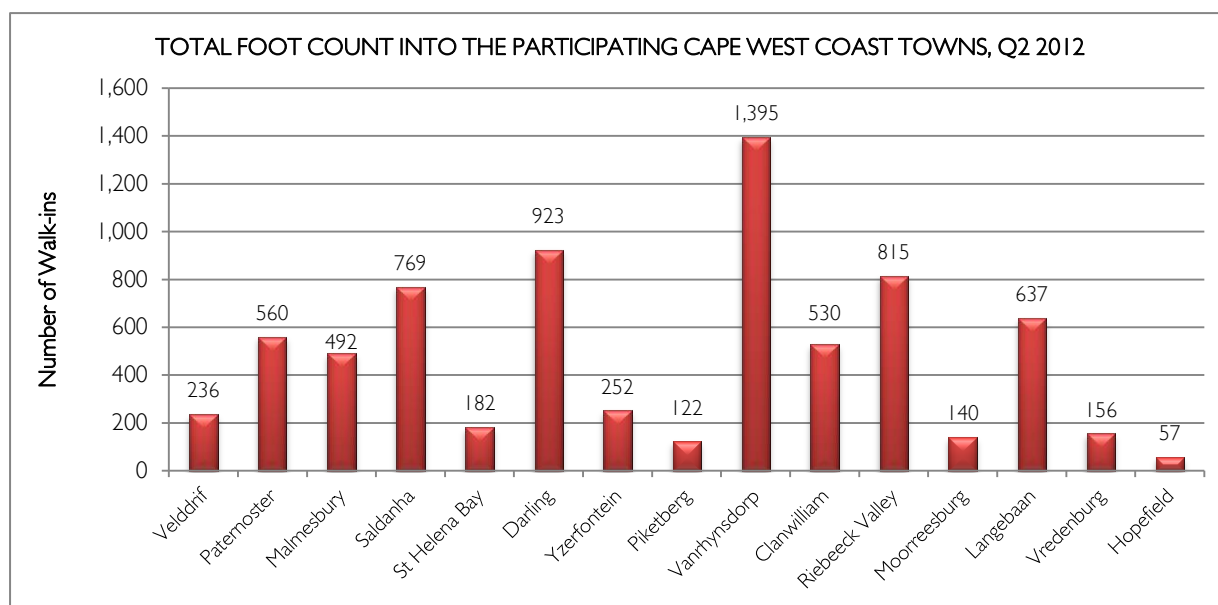
Visitors were asked to provide overall comments on the destination, 34.7% described the Cape Winelands as a great destination, 14.9% complimented the helpful service obtained, 4% conveyed their thanks and appreciation, 3.3% had an excellent overall experience and 1.7% provided various other comments.

## 6. Cape West Coast

### 6.1 Cape West Coast Trends

#### 6.1.1 Foot count

The foot count is the number of walk-ins received by participating towns in the Cape West Coast, which was a total of **7,266** in Q2 2012: April (3,166), May (2,496) and June (1,604).



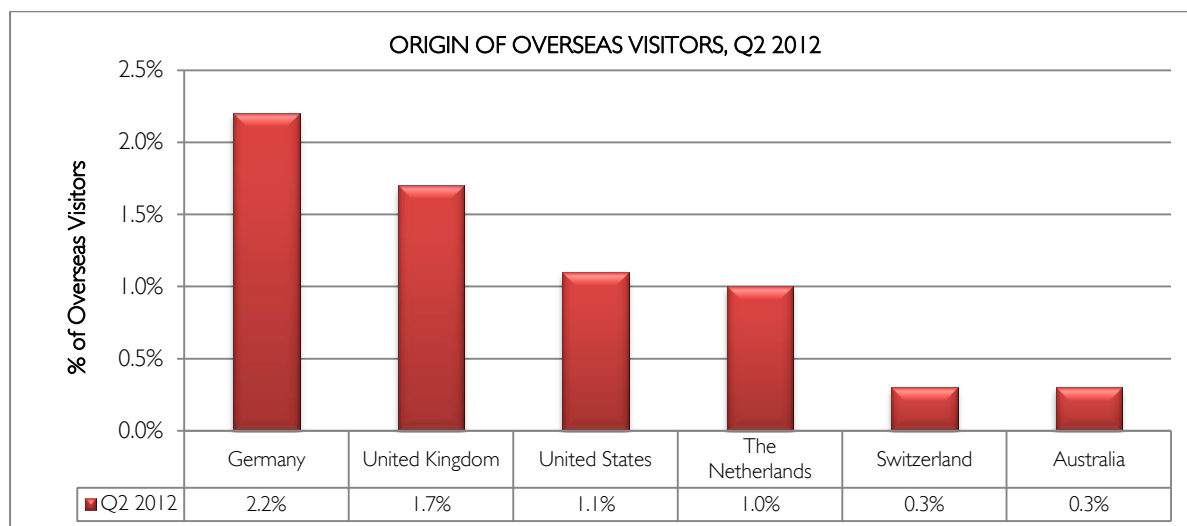
#### 6.1.2 Trends and patterns

In Q2 2012, a total of **882** responses to the Regional Visitor Tracking Survey were obtained from the Cape West Coast region. These responses were received across April (33.6%), May (35.7%) and June (30.7%). The participating towns in the region were:

- Darling (39.2%)
- Hopefield (3.7%)
- Malmesbury (32.5%)
- Piketberg (4.6%)
- Porterville (6%)
- Saldanha (1.8%)
- St Helena Bay (7.7%)
- Velddrif (3.7%)
- Yzerfontein (0.6%)

### 6.1.3 Origin of visitors

In Q2 2012, 91.5% of visitors to the Cape West Coast were domestic, followed by 7.5% who were from overseas and 0.5% were from Africa (excluding domestic) and did not indicate their country of origin (respectively). Of the overseas visitors, 2.2% were from Germany, followed by the United Kingdom (1.7%), United States (1.1%), the Netherlands (1%) and 0.3% were from Switzerland and Australia.



The domestic visitors dominated across almost all the participating Cape West Coast towns, apart from Yzerfontein, which received more overseas visitors than domestic. Yzerfontein received the highest (100%) share of overseas visitors, followed by Saldanha (12.5%) and Porterville (11.3%). Malmesbury enjoyed the highest (97.2%) share of domestic visitors, followed by Hopefield (97%), St Helena Bay (91.2%) and Piketberg (90.2%). Velddrif (6.1%) and Darling (0.3%) were the only towns which received visitors from Africa (excluding domestic).

ORIGIN OF VISITORS TO PARTICIPATING CAPE WEST COAST TOWNS, Q2 2012			
TOWN	OVERSEAS (%)	DOMESTIC (%)	AFRICA (EXCL DOMESTIC) (%)
Darling	9.2	89.3	0.3
Hopefield	3.0	97.0	-
Malmesbury	2.8	97.2	-
Piketberg	7.3	90.2	-
Porterville	11.3	88.7	-
Saldanha	12.5	87.5	-
St Helena Bay	8.8	91.2	-
Velddrif	9.1	81.8	6.1
Yzerfontein	100.0	-	-

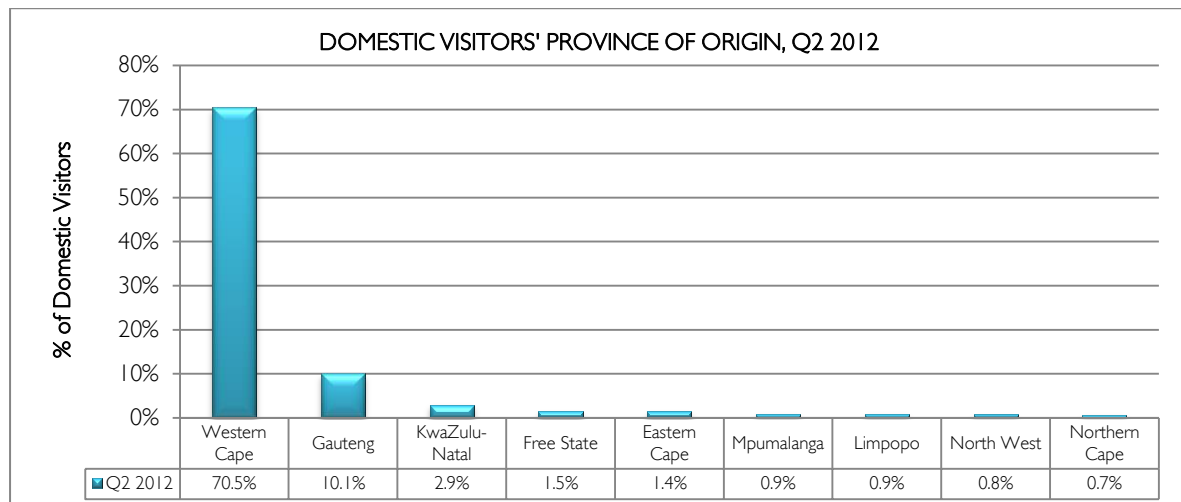
As seen below, South Africa dominated as the top source market across all the participating Cape West Coast towns, apart from Yzerfontein, which predominantly received overseas visitors. The United Kingdom, Germany, United States, The Netherlands, New Zealand, Switzerland, Australia, Tanzania, Portugal and Norway were among the top overseas countries.

TOP THREE SOURCE COUNTRIES TO THE CAPE WEST COAST'S PARTICIPATING TOWNS, Q2 2012			
TOWN	FIRST	SECOND	THIRD
Darling	South Africa (89.3%)	United Kingdom (3.2%)	The Netherlands (1.7%)
Hopefield	South Africa (97%)	New Zealand (3%)	-
Malmesbury	South Africa (97.2%)	Germany (2.1%)	United Kingdom, United States (0.3%)
Piketberg	South Africa (90.2%)	United States, Switzerland, Australia, Tanzania (2.4%)	-
Porterville	South Africa (88.7%)	Germany, United States (5.7%)	-

TOP THREE SOURCE COUNTRIES TO THE CAPE WEST COAST'S PARTICIPATING TOWNS, Q2 2012

TOWN	FIRST	SECOND	THIRD
Saldanha	South Africa (87.5%)	United Kingdom, Germany (6.3%)	-
St Helena Bay	South Africa (91.2%)	The Netherlands (4.4%)	Germany (2.9%)
Velddrif	South Africa (81.8%)	Germany (6.1%)	United States, Zimbabwe, Namibia (3%)
Yzerfontein	United Kingdom (40%)	Germany, Norway, Portugal (20%)	-

Of the domestic visitors, 70.5% were from the Western Cape, followed by Gauteng (10.1%), KwaZulu-Natal (2.9%), Free State (1.5%), Eastern Cape (1.4%), 0.9% were from Mpumalanga and Limpopo, 0.8% from North West and 0.7% from the Northern Cape.



The table below illustrates the top three provinces from which visitors to the participating Cape West Coast towns originated. The Western Cape ranked first place across almost all the participating Cape West Coast towns, apart from Yzerfontein.

TOP THREE PROVINCES FROM WHICH VISITORS TO THE CAPE WEST COAST ORIGINATED, Q2 2012

TOWN	FIRST	SECOND	THIRD
Darling	Western Cape (54.3%)	Gauteng (15.6%)	KZN (6.6%)
Hopefield	Western Cape (97%)	-	-
Malmesbury	Western Cape (97.2%)	-	-
Piketberg	Western Cape (53.7%)	Gauteng (31.7%)	KZN, Mpumalanga (2.4%)
Porterville	Western Cape (67.9%)	Gauteng (7.5%)	Mpumalanga, KZN (3.8%)
Saldanha	Western Cape (43.8%)	Gauteng (18.8%)	Free State (12.5%)
St Helena Bay	Western Cape (64.7%)	Gauteng (14.7%)	Free State, northern Cape (4.4%)
Velddrif	Western Cape (42.4%)	Gauteng (15.2%)	Eastern Cape (6.1%)
Yzerfontein	-	-	-

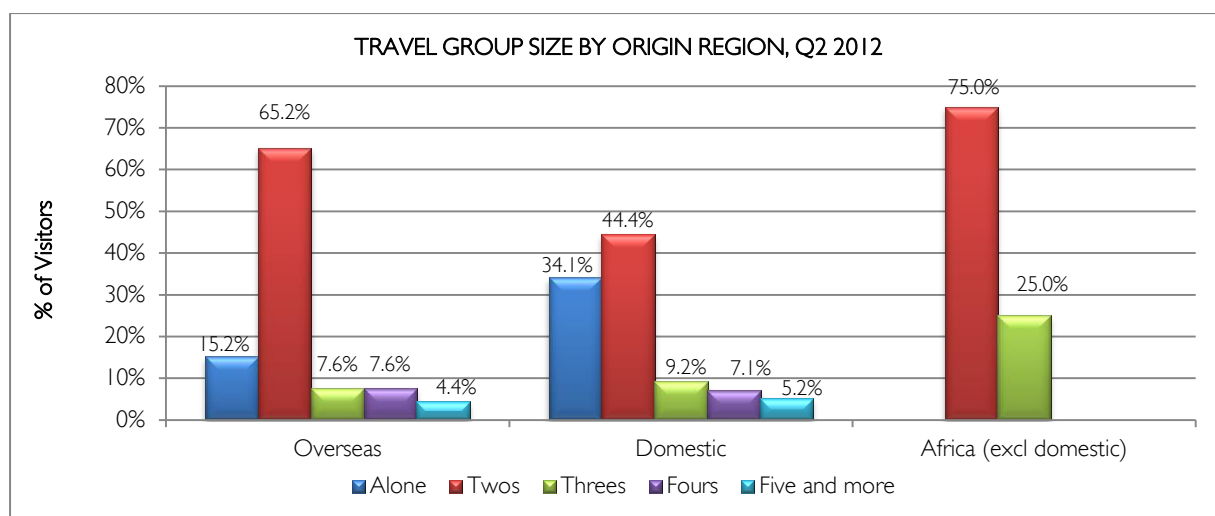
#### 6.1.4 Travel group size and length of stay

Of the visitors to the Cape West Coast, 32.3% travelled alone, 46% travelled in pairs, 9.2% in groups of threes, 7.1% in groups of fours and 5.4% travelled in groups of five and more. Of these visitors, the overall average as well as most common travel group size was two.

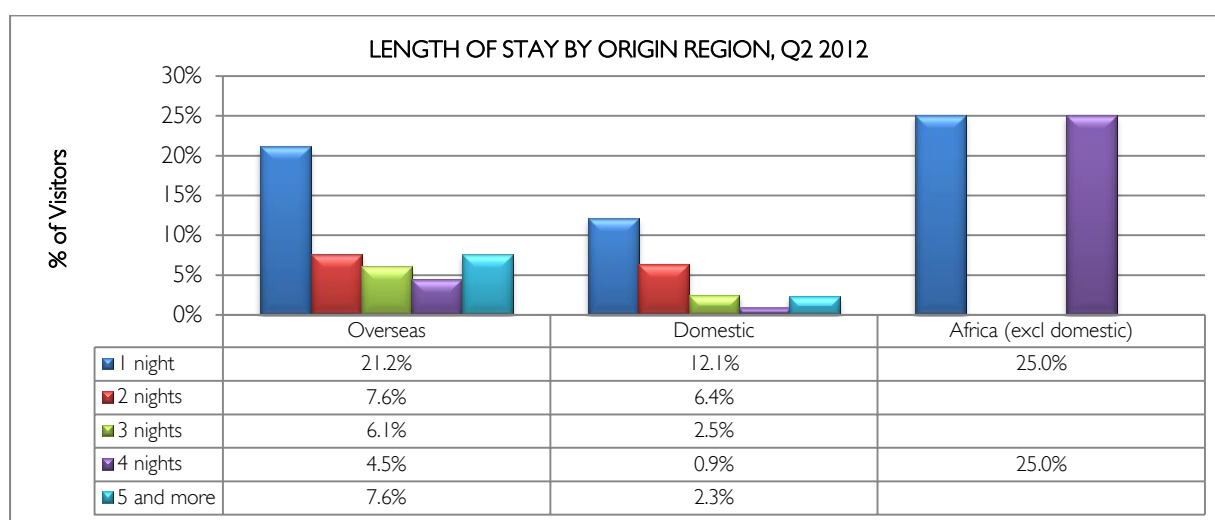
The overall average as well as most common travel group size of the overseas visitors was two. Most (65.2%) of the overseas visitors travelled in pairs, followed by 15.2% who travelled alone, 7.6% each travelled in groups of three and four, and 4.4% travelled in groups of five and more.

Among the domestic visitors, 34.1% travelled alone, 44.4% travelled in pairs, 9.2% in groups of three, 7.1% in groups of four and 5.2% travelled in groups of five and more.

Visitors from Africa (excluding domestic) recorded an average travel group size of two, of these visitors, 75% travelled in pairs and 25% in groups of three.



The overall average length of stay of visitors to the Cape West Coast was three nights and the most common was one night. Of these visitors, 26.1% indicated that they stayed overnight, of which 12.9% stayed for one night, 6.5% for two nights, 2.7% for three nights, 1.2% for four nights, 2.8% stayed for five nights and more and 73.9% did not indicate their length of stay in the region.



Of the overseas visitors, 47% indicated that they stayed overnight, of which the majority (21.2%) stayed for one night, followed by 7.6% who each stayed for two nights and five nights and more, 6.1% stayed for three nights and 4.5% for four nights.

The average length of stay among the domestic visitors was three nights and 24.2% indicated that they stayed overnight in the region, of which 12.1% stayed for one night, 6.4% for two nights, 2.5% for three nights, 0.9% for four nights and 2.3% stayed for five nights and more.

50% of visitors who originated from Africa (excluding domestic) indicated that they stayed overnight, of which 25% stayed for one and four nights (respectively).

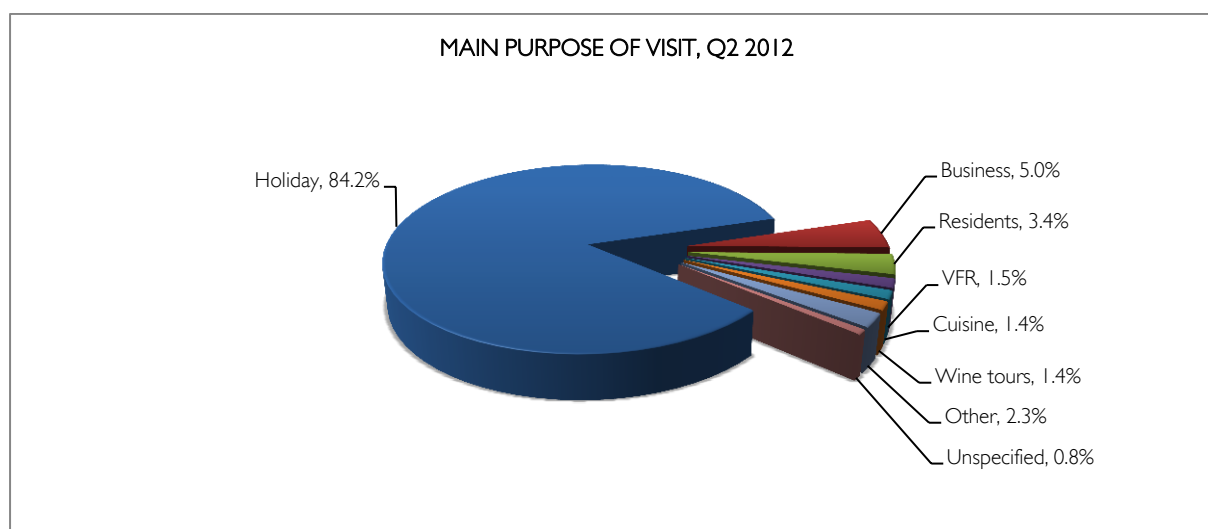
Visitors to the Cape West Coast mainly travelled in pairs and in groups of three. Velddrif enjoyed the highest (four nights) average length of stay, followed by Saldanha and Darling who each enjoyed an average length of stay of three nights.

AVERAGE GROUP SIZE AND LENGTH OF STAY (IN NIGHTS) IN CAPE WEST COAST TOWNS, Q2 2012						
TOWN	AVERAGE GROUP SIZE			AVERAGE LENGTH OF STAY (IN NIGHTS)		
	OVERSEAS	DOMESTIC	ALL	OVERSEAS	DOMESTIC	ALL
Velddrif	1.7	2.4	2.4	6.0	4.1	4.2
Porterville	2.3	2.2	2.2	2.8	1.9	2.0
Piketberg	8.7	2.0	2.5	-	2.0	2.0
Hopefield	2.0	1.7	1.7	-	-	-
Saldanha	2.0	1.8	1.8	4.5	3.1	3.4
Malmesbury	1.5	1.7	1.7	-	-	-
Yzerfontein	2.4	-	2.4	2.0	-	2.0
Darling	2.3	2.6	2.6	3.3	2.7	2.8
St Helena Bay	2.5	2.0	2.0	2.0	2.2	2.1

### 6.1.5 Main purpose of visit and mode of transport

The main purpose of visit to the Cape West Coast was for holiday (84.2%), followed by 5% who travelled for business, 3.4% were residents seeking general information, 1.5% visited friends and relatives, 1.4% enjoyed the cuisine in the region, 1.4% explored the wine routes of offer, 2.3% travelled for various other reasons and 0.8% did not indicate their purpose of visit.

Of the overseas visitors, 89.4% travelled for holiday, 3% each travelled for business and enjoyed the cuisine, 1.5% visited friends and relatives and 1.4% explored the wine tours. Among the domestic visitors, 83.9% travelled for holiday, 5.2% for business, 3.6% were local residents, 1.4% visited friends and relatives, 1.4% explored the wine tours, and 3.8% travelled for various other reasons. All visitors who originated from Africa (excluding domestic) travelled for holiday.



Almost all (95.5%) visitors to the Cape West Coast used a car as their main mode of transport, followed by 1.6% who travelled about on foot, 0.5% used various other modes of transport and 2.4% did not indicate their mode of transport. Of the overseas visitors, 95.5% travelled by car and 4.5% on foot. Among the domestic visitors, 95.7% travelled by car and 1.8% used other modes of transport. All visitors from Africa (excluding domestic) used a car as their main mode of transport.

### 6.1.6 General comments about the Cape West Coast

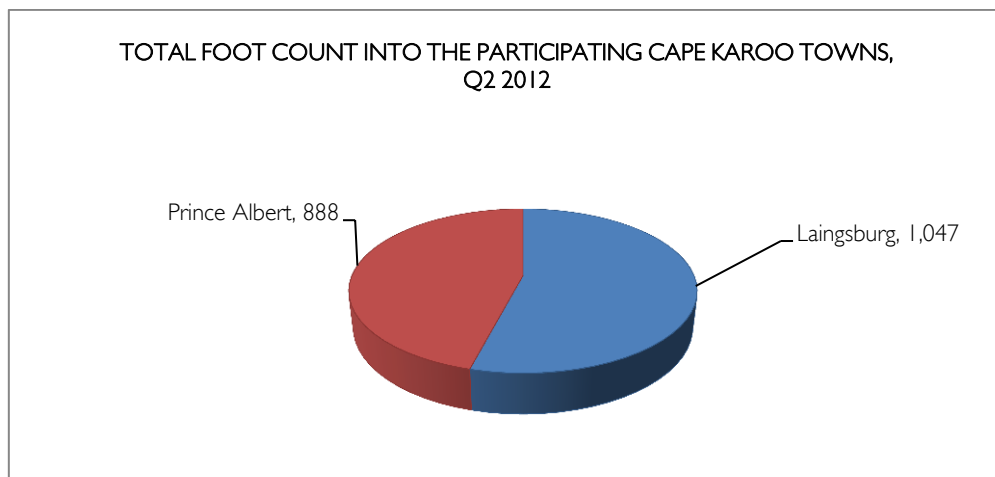
Visitors were asked to provide overall comments on the destination, of which 16.3% described the destination as great, 6.3% complimented the helpful service obtained at the respective tourism offices, 2.8% described their overall experience as excellent, 1.6% conveyed various other comments and 73% did not provide an overall comment.

## 7. Cape Karoo

### 7.1 Cape Karoo Trends

#### 7.1.1 Foot count

The foot count is the number of walk-ins received by participating towns in the Cape Karoo, which was a total of **1,935** in Q2 2012: April (699), May (450) and June (786). Laingsburg received a total of 1,047 walk-ins and Prince Albert received 888 walk-ins.



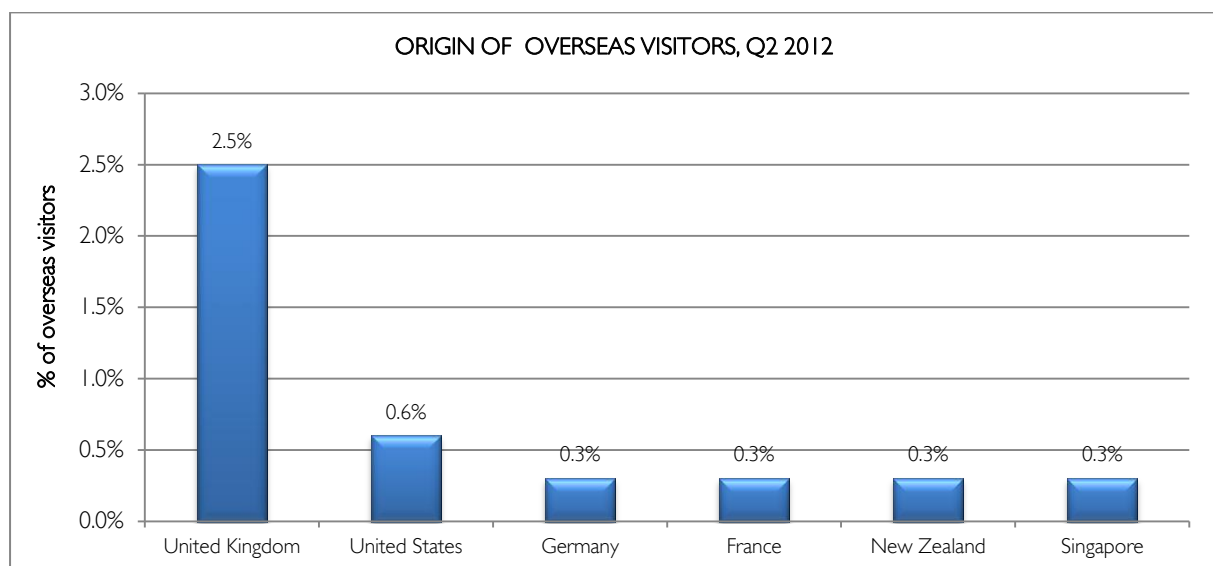
#### 7.1.2 Trends and patterns

A total of **320** responses to the Regional Visitor Tracking Survey were received in the Cape Karoo region in Q2 2012. Participating towns were Laingsburg (95.3%) and Beaufort West (4.7%) and data was collected in the following months:

- April (45.6%)
- May (21.3%)
- June (33.1%)

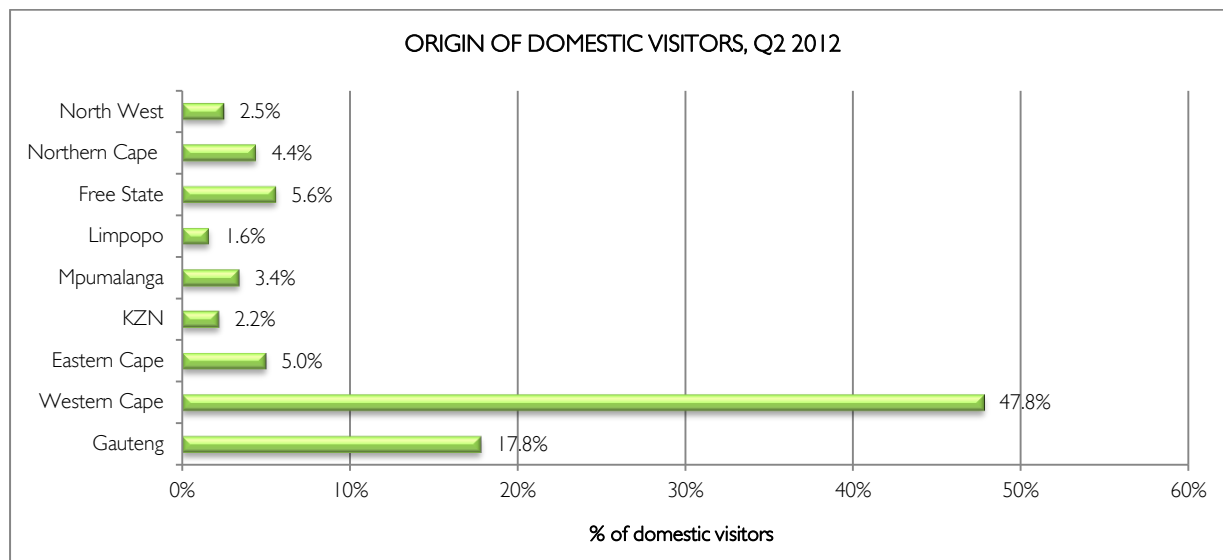
#### 7.1.3 Origin of visitors

4.4% of visitors indicated that they were from overseas, 93.8% were domestic and 0.9% from Africa, excluding domestic. Of the overseas visitors, 2.5% were from the United Kingdom, followed by the United States (0.6%).

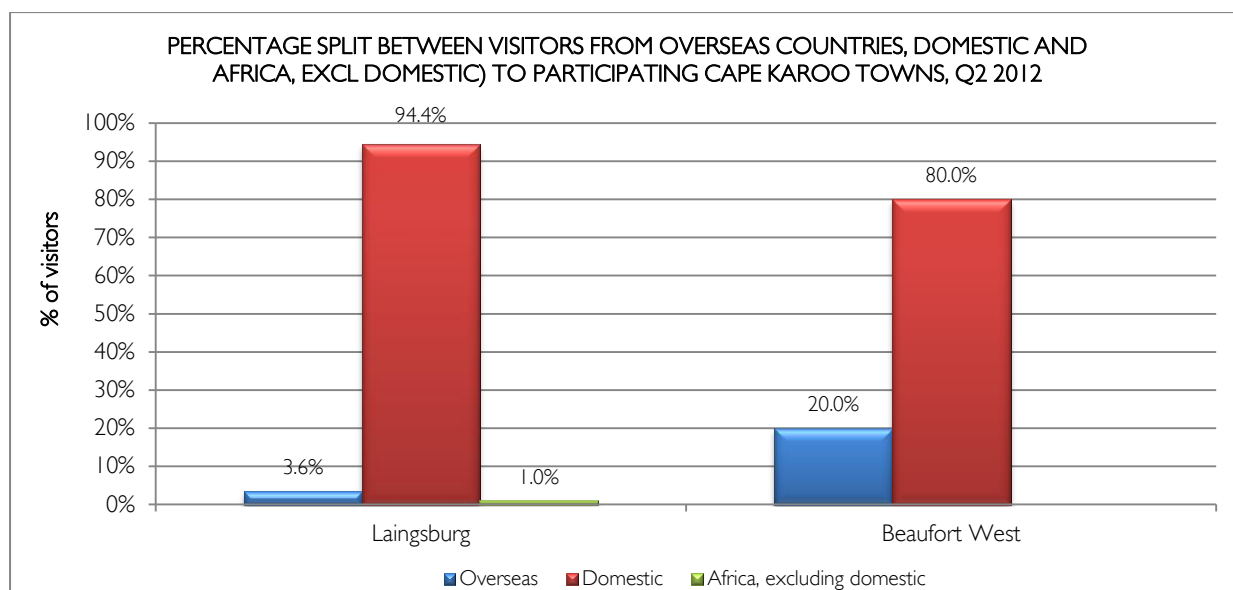




Of the domestic visitors, 47.8% were from the Western Cape followed by 17.8% from Gauteng, 5.6% from the Free State, 5% from Eastern Cape, 4.4% from Northern Cape, 3.4% from Mpumalanga, 2.5% from North West, 2.2% from KwaZulu-Natal, 1.6% from Limpopo and 3.5% of domestic visitors did not indicate their province of origin.



In the below figure the percentage split between visitors from overseas countries, South Africa and Africa (excluding domestic) to the participating towns are illustrated. Laingsburg received more domestic visitors (94.4%) than overseas (3.6%) and visitors from Africa, excluding domestic (1%). 1% of visitors to Laingsburg did not indicate their region of origin. Beaufort West also received more domestic visitors (80%) than overseas visitors (20%) and none recorded from Africa (excluding domestic).



In the below table the top three source markets are illustrated. Both towns, Laingsburg and Beaufort West received the most visitors from South Africa, followed by the United Kingdom, Germany and France in second place. Also ranking in the top three source markets to Laingsburg and Beaufort West and ranking third, were visitors from United States and Zimbabwe.

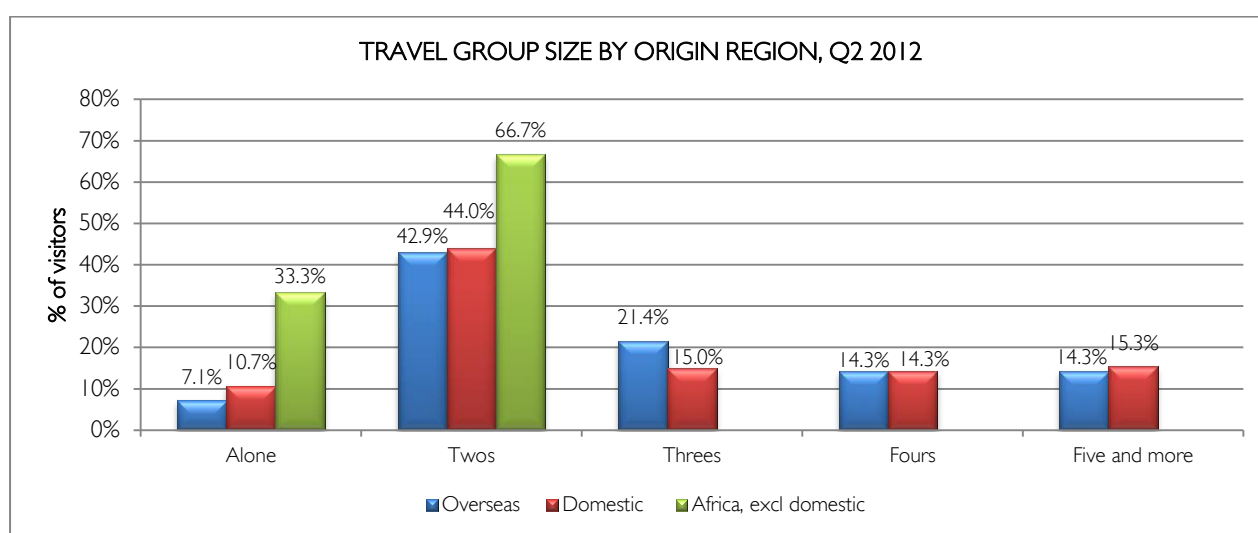
TOP THREE SOURCE COUNTRIES TO VISIT PARTICIPATING TOWNS IN THE CAPE KAROO, Q2 2012		
RANK	LAINGSBURG	BEAUFORT WEST
First	South Africa (94.4%)	South Africa (80%)
Second	United Kingdom (2.3%)	Germany, France and United Kingdom (6.7% each)
Third	United States and Zimbabwe (0.7% each)	-

In the below table the top three domestic visitors' province of origin to the region is demonstrated and for both towns visitors mostly originated from the Western Cape and Gauteng and the Eastern Cape.

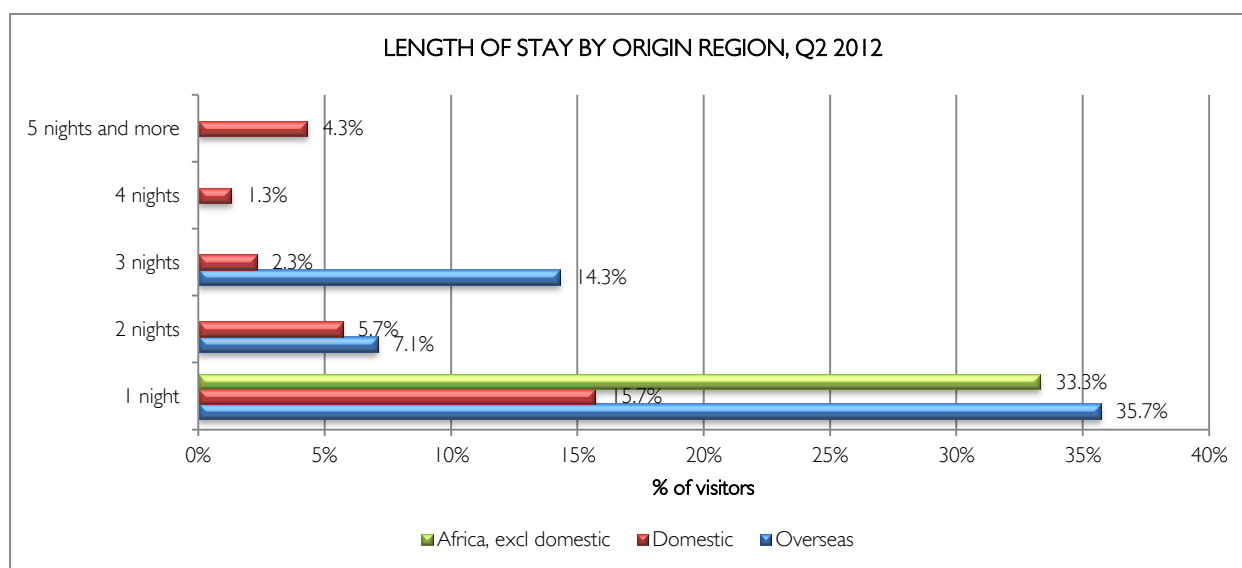
TOP THREE DOMESTIC VISITORS' PROVINCE OF ORIGIN TO PARTICIPATING CAPE KAROO TOWNS, Q2 2012		
RANK	LAINGSBURG	BEAUFORT WEST
First	Western Cape (48.5%)	Western Cape (33.3%)
Second	Gauteng (18.5%)	Eastern Cape (13.3%)
Third	Free State (5.6%)	Gauteng, Mpumalanga, Free State, Northern Cape, North West (6.7% each)

### 7.1.4 Travel group size and length of stay

The average travel group size was three and the most common was two. Of the visitors to the Cape Karoo region, 10.6% travelled alone, 44.1% in pairs, 15.3% in groups of three, 14.4% in groups of four and 15% in groups of five and more. 0.6% did not indicate their group size.



Of the overseas visitors, 7.1% travelled alone, 42.9% in pairs, those who travelled in groups of three (21.4%), and groups of four and groups of five and more (14.3% each). Of the domestic visitors, 10.7% travelled alone, 44% in pairs, 15% in groups of three, 14.3% in groups of four and 15.3% in groups of five and more. Of the visitors from Africa, excluding domestic, 33.3% travel alone and 66.7% travelled in pairs.



Visitors were asked whether they stayed overnight in the Cape Karoo region in Q2 2012 and 30.3% said they stayed overnight and 69.7% were day visitors. The average length of stay in the region was three nights and the most common was one night. Of the visitors, 16.6% stayed over for one night, 5.6% for two nights, 2.8% for three nights and 1.3% for four nights and 4% for five nights and more and 69.7% did not indicate their length of stay.

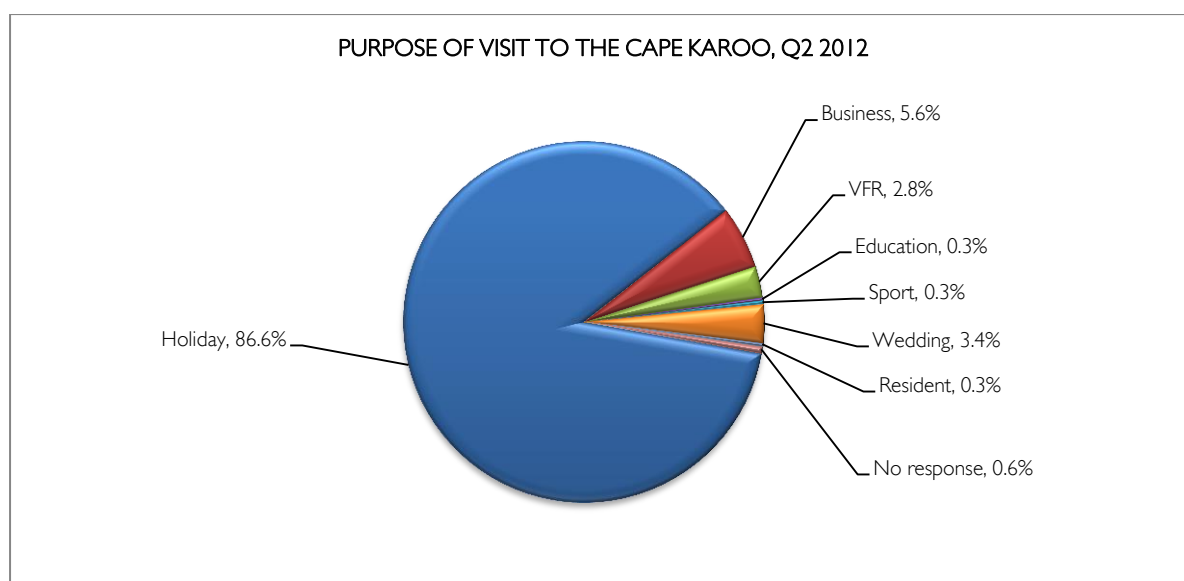
Of the overseas visitors, 57.1% stayed overnight and 42.9% were day visitors. The average length of stay for overseas visitors was two nights and the most common was one night. Of this particular group, 35.7% stayed over for one night, 7.1% for two nights and 14.3% for three nights.

Of the domestic visitors, 29.3% stayed overnight in the region and 70.7% were day visitors. The average length of stay for domestic visitors was three nights and the most common was one night. 15.7% stayed over for one night, 5.7% for two nights, 2.3% for three nights, 1.3% for four nights and 4.3% for five nights and more.

AVERAGE TRAVEL GROUP SIZE AND AVERAGE LENGTH OF STAY (NIGHTS) IN THE CAPE KAROO REGION, Q2 2012								
TOWN	AVERAGE GROUP SIZE				AVERAGE LENGTH OF STAY (NIGHTS)			
	OVERSEAS	DOMESTIC	AFRIC, EXCL DOMESTIC	ALL	OVERSEAS	DOMESTIC	AFRIC, EXCL DOMESTIC	ALL
Laingsburg	5.1	3.4	1.7	3.5	1.2	3.2	1.0	3.0
Beaufort West	2.0	2.9	-	2.7	2.3	4.6	-	4.1

### 7.1.5 Main purpose of visit and mode of transport

The main purpose for visiting the Cape Karoo region in Q2 2012 was for holiday (86.6%), followed by business (5.6%) visiting friends and relatives (2.8%), attending weddings (3.4%), and for educational purposes and sport participation or spectators (0.3% each). 0.3% were residents looking for travel information at the local tourism office and 0.6% did not indicate their main purpose of visit to the region.



PURPOSE OF VISIT AT PARTICIPATING CAPE KAROO TOWNS, Q2 2012						
TOWN	HOLIDAY	BUSINESS	VFR	WEDDING	SPORT	EDUCATION
Laingsburg	86.6%	5.6%	2.6%	3.6%	0.3%	0.3%
Beaufort West	86.7%	6.7%	6.7%	-	-	-

Of the visitors to the Cape Karoo region in Q2 2012, 91.6% travelled by car, 4.1% by bus, 0.9% by foot and 1.3% by motorcycle. 2.2% did not indicate their main mode of transportation. 92.9% of overseas visitors, 91.3% of domestic visitors and 100% of Africa (excluding domestic) visitors used the car as their main mode of transportation. 7.1% of overseas visitors travelled by bus and 4% of domestic visitors travelled by bus, 1% by foot and 1.3% by motorcycle.

## 7.1.6 General comments about the Cape Karoo

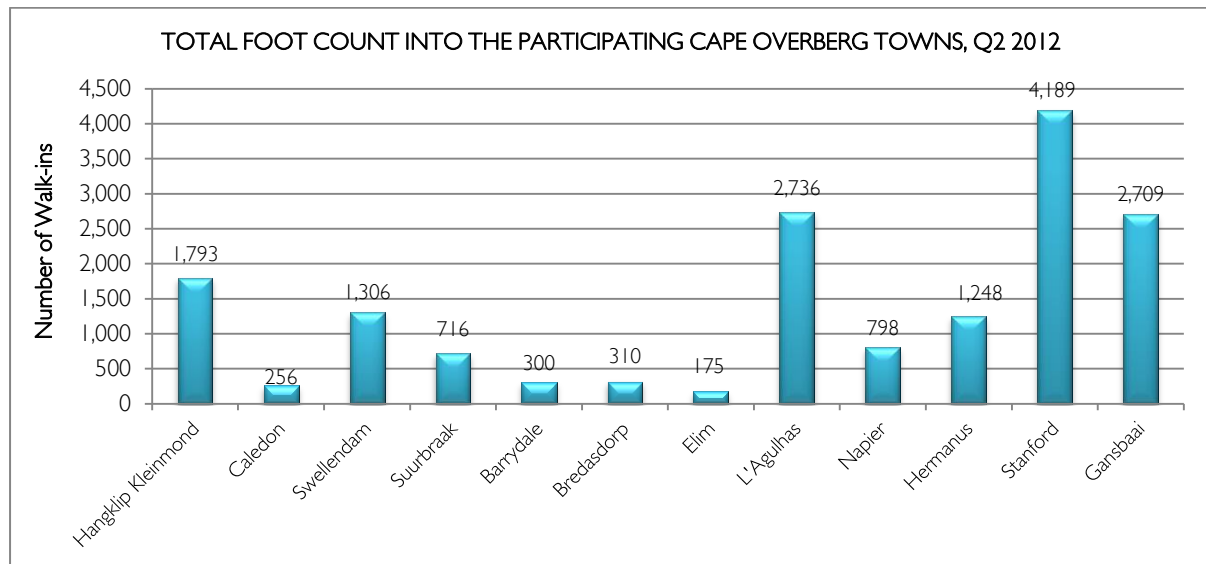
The visitors were given the opportunity to provide comments on the destination, the Cape Karoo and 42.2% said that it is a great destination. 18.1% complemented the friendly and professional customer service they have received and 15.9% gave great comments on the tourism products in the region. 3.4% said they had a wonderful experience in the Cape Karoo and 5.6% extended their thanks for assistance received at the local tourism office.

## 8. Cape Overberg

### 8.1 Cape Overberg Trends

#### 8.1.1 Foot count

The foot count is the number of walk-ins received by participating towns in the Cape Overberg, which was a total of **16,536** in Q2 2012: April (6,976), May (4,595) and June (4,965). Stanford received 4,189 walk-ins, followed by L'Agulhas (2,736), Gansbaai (2,709), Hangklip Kleinmond (1,793), Swellendam (1,306), Hermanus (1,248), Napier (798), Suurbraak (716), Bredasdorp (310), Barrydale (300), Caledon (256) and Elim (175).

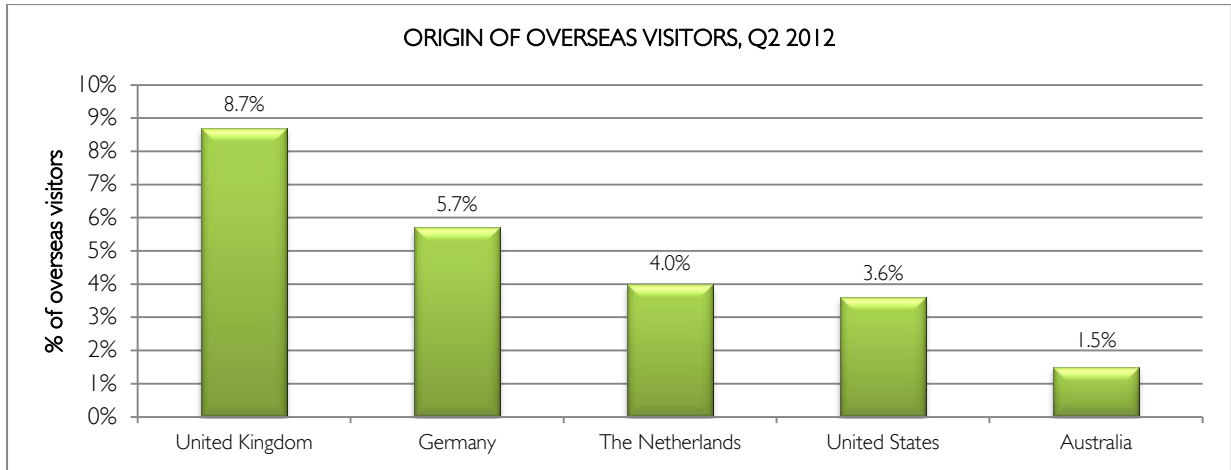


#### 8.1.2 Trends and patterns

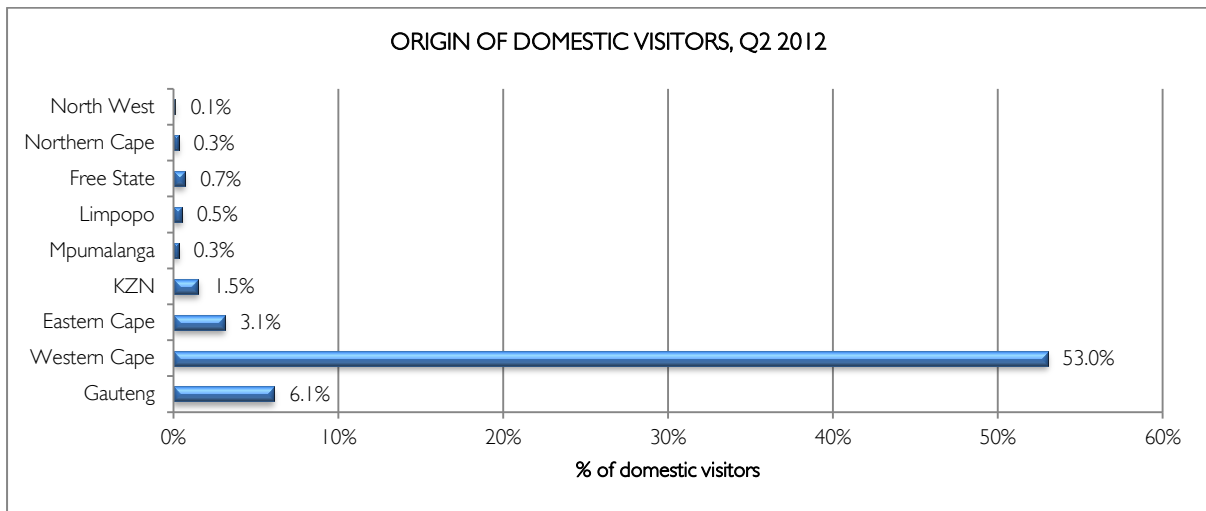
A total of **976** responses to the Regional Visitor Tracking Survey were received from towns, Swellendam (55.4%), Stanford (3.4%), Caledon (12.4%), Barrydale (12.5%) and Suurbraak (16.3%) in the Cape Overberg region. Data were collected in the months in Q2 2012, April (45.3%), May (33.1%) and June (21.6%).

#### 8.1.3 Origin of visitors

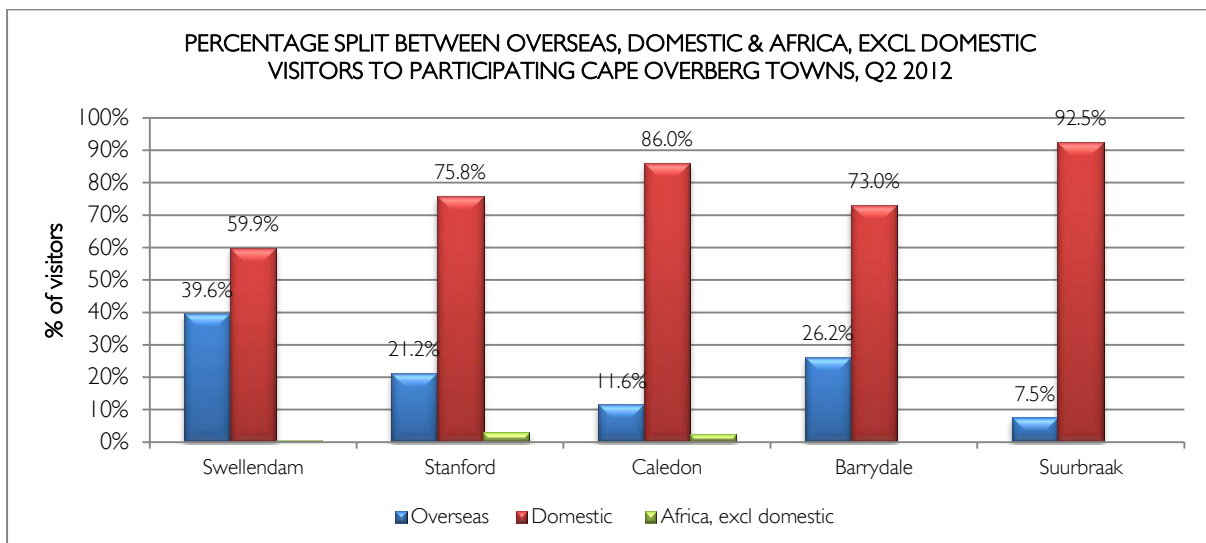
28.6% of visitors were from overseas, 70.6% were from South Africa and 0.6% from Africa (excluding South Africa) and 0.2% did not indicate their region of origin. Of the overseas visitors, 8.7% were from the United Kingdom, 5.7% from Germany, 4% from the Netherlands and 3.6% from the United States.



Of the domestic visitors, 53% were from the Western Cape, 6.1% from Gauteng, 3.1% from the Eastern Cape, 1.5% from KwaZulu-Natal, 0.7% from Free State, 0.5% from Limpopo, 0.3% (each) from Mpumalanga and Northern Cape and 0.1% from North West. 34.3% of domestic visitors did not indicate their province of origin.



In the below figure the percentage split between overseas and domestic visitors from participating towns are illustrated. All the participating towns received more domestic visitors than overseas visitors. Stanford and Caledon were the only towns that recorded visitors from Africa, excluding domestic.



TOP THREE SOURCE COUNTRIES TO VISIT PARTICIPATING TOWNS IN THE CAPE OVERBERG, Q2 2012

RANK	SWELLENDAM	STANFORD	CALEDON	BARRYDALE	SUURBRAAK
First	South Africa (59.9%)	South Africa (75.8%)	South Africa (86%)	South Africa (73%)	South Africa (92.5%)
Second	United Kingdom (10.7%)	United Kingdom (6.1%) United States (6.1%)	United Kingdom (2.5%)	United Kingdom (14.8%)	United Kingdom (2.5%)
Third	Germany (8.3%)	Germany (3%) Netherlands (3%) France (3%) Kenya (3%)	Germany (1.7%) United States (1.7%) Netherlands (1.7%)	United States (5.7%)	Germany (1.9%)

In the above table the top three source countries who visited the Cape Overberg towns are illustrated. South Africa ranked first, followed by United States and United Kingdom. In the table below the top three domestic visitors' province of origin are shown. Western Cape ranked first, followed by Gauteng which is ranked second across the participating towns.

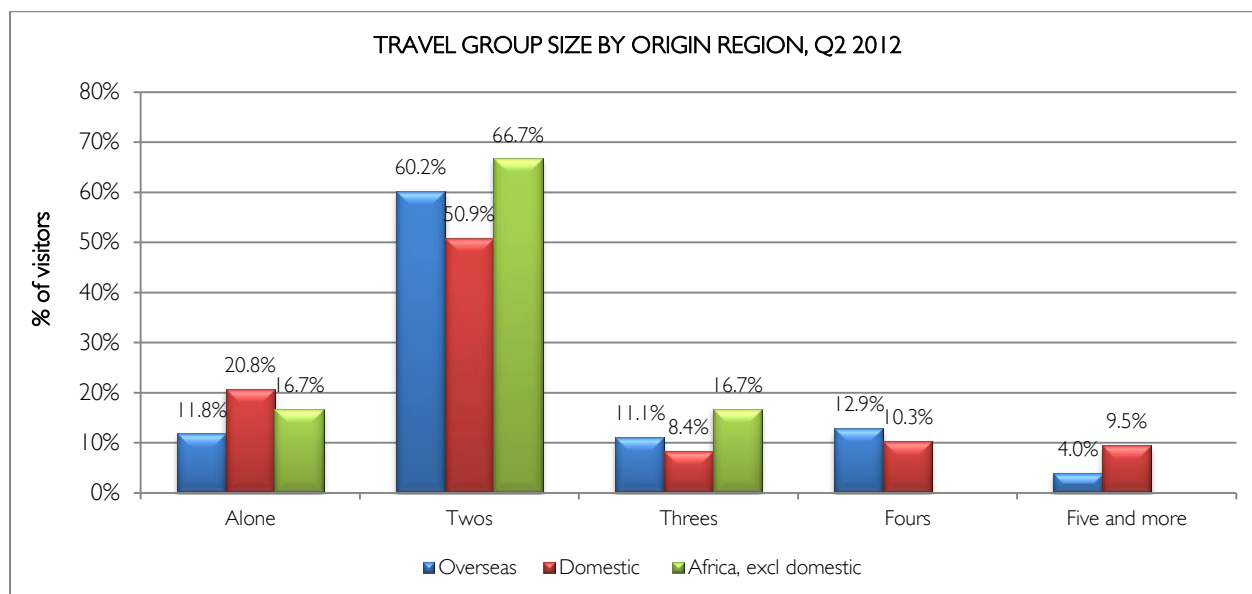
TOP THREE DOMESTIC VISITORS' PROVINCE OF ORIGIN BY PARTICIPATING CAPE OVERBERG TOWNS, Q2 2012

RANK	SWELLENDAM	STANFORD	CALEDON	BARRYDALE	SUURBRAAK
First	Western Cape (42.5%)	Western Cape (6.1%)	Western Cape (70.2%)	Western Cape (55.7%)	Western Cape (83%)
Second	Gauteng (7%)	-	Gauteng (3.3%)	Gauteng (9%)	Gauteng (4.4%)
Third	Eastern Cape (4.1%)	-	Eastern Cape, KZN (1.7% each)	Eastern Cape (4.9%)	Limpopo (1.9%)

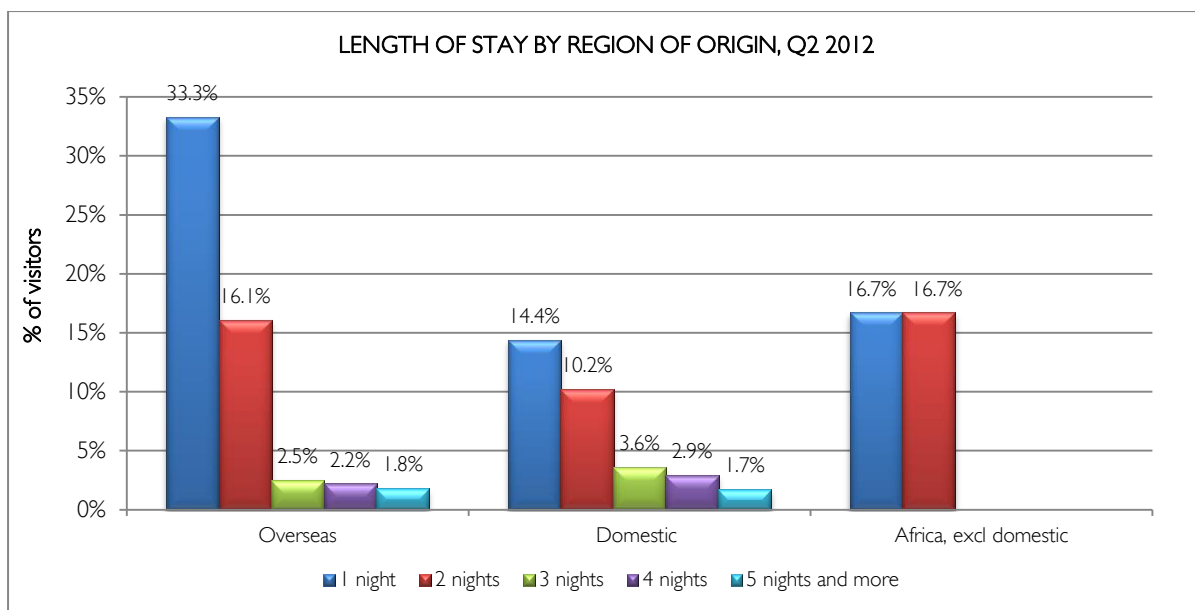
#### 8.1.4 Travel group size and length of stay

The average travel group size was three and the most common was two. Of the visitors to the Cape Overberg region, 18.1% travelled alone, 53.8% travelled in pairs, 9.2% in threes, 11% in fours and 7.8% in groups of five and more. 0.1% did not indicate their travel group size.

Of the overseas visitors, 11.8% travelled alone, 60.2% in pairs, 11.1% in threes, 12.9% in fours and 4% in groups of five and more. Of the domestic visitors, 20.8% travelled alone, 50.9% in pairs, 8.4% in groups of three, 10.3% in groups of four and 9.5% in groups of five and more.



The visitors were asked whether they stayed overnight and 39.4% said they did and 60.6% were day visitors to the Cape Overberg region. 19.9% of the visitors stayed over for one night, 11.9% for two nights, 3.3% for three nights, 2.7% for four nights and 1.6% for five nights and more. 60.6% did not indicate their length of stay in the region.



Of the overseas visitors, 55.9% stayed overnight and 44.1% were day visitors. The average length of stay was three nights and the most common was one night. Of the overseas visitors, 33.3% stayed over for one night, 16.1% for two nights, 2.5% for three nights, 2.2% for four nights and 1.8% for five nights and more.

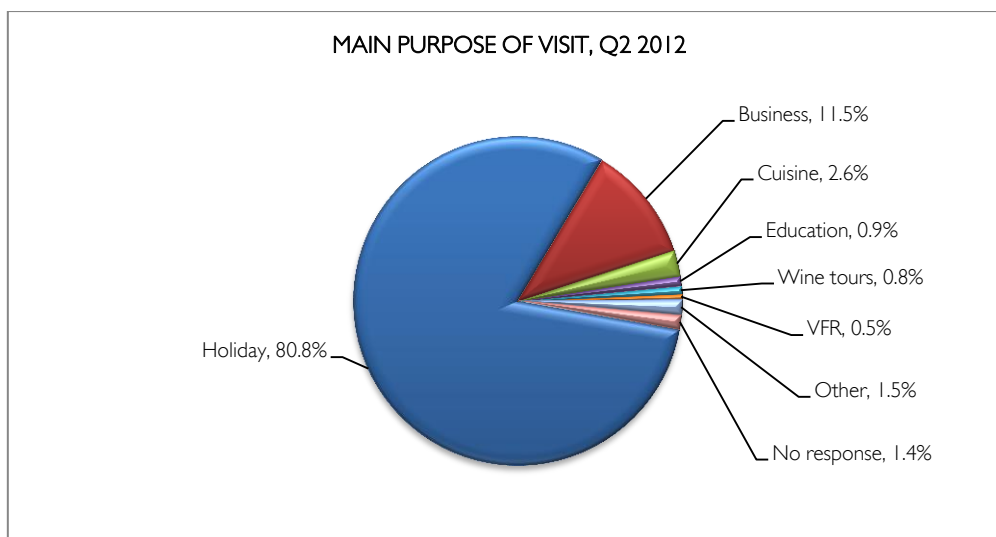
Of the domestic visitors, 32.8% stayed overnight and 67.2% were day visitors. The average length of stay was two nights and the most common was one night. Of the domestic visitors, 14.4% stayed over for one night, 10.2% for two nights, 3.6% for three nights, 2.9% for four nights and 1.7% for five nights and more.

AVERAGE TRAVEL GROUP SIZE AND LENGTH OF STAY (NIGHTS) BY PARTICIPATING CAPE OVERBERG TOWNS, Q2 2012								
TOWN	AVERAGE GROUP SIZE				AVERAGE LENGTH OF STAY (NIGHTS)			
	OVERSEAS	DOMESTIC	AFRICA, EXCL DOMESTIC	ALL	OVERSEAS	DOMESTIC	AFRICA, EXCL DOMESTIC	ALL
Swellendam	2.4	2.5	2.0	2.4	1.7	2.1	2.0	1.9
Stanford	2.1	2.6	3.0	2.5	3.0	2.0	-	2.1
Caledon	1.9	1.5	1.7	1.5	52.8	4.1	1.0	15.5
Barrydale	2.6	2.5	-	2.5	1.0	1.4	-	1.3
Suurbraak	2.9	4.7	-	4.5	1.7	4.8	-	4.2

### 8.1.5 Main purpose of visit and mode of transport

The main purpose of visit was holiday (80.8%), followed by business (11.5%), to experience the cuisine (2.6%), for educational purposes (0.9%), embarking wine tours (0.8%), visiting friends and relatives (VFR) (0.5%), other reasons (1.5%) such as medical, sport, weddings, honeymoon and events. 1.4% did not indicate their main purpose of visit.

Of the overseas visitors, 91.8% travelled to the region for holiday, followed by those who visited for the cuisine (3.6%), business and visiting friends and relatives (1.1% each). Of the domestic visitors, 76.5% travelled for holiday, 15.5% for business, 2.2% to experience the local cuisine and 1.2% (each) came for wine tours and educational purposes to the region.



PURPOSE OF VISIT AT PARTICIPATING TOWNS IN THE CAPE OVERBERG, Q2 2012					
TOWN	HOLIDAY	BUSINESS	VFR	EDUCATION	CUISINE
Swellendam	88%	6.8%	0.7%	0.2%	2.2%
Stanford	63.6%	6.1%			3%
Caledon	44.6%	40.5%		4.1%	0.8%
Barrydale	90.2%				9%
Suurbraak	80.5%	15.1%	0.6%	1.9%	

72.7% of visitors travelled by car to and within the Cape Overberg region in Q2 2012, followed by those who travelled on foot (9.2%), by bus (3.1%), by 4x4 Truck (0.8%), by motorcycle (0.4%) and by taxi and shuttle services (0.1% each). 84.6% of the overseas visitors and 50% of the domestic visitors travelled by car.

### 8.1.6 General comments about the Cape Overberg

When visitors were asked about their experience in the Cape Overberg region, 28.2% indicated that they received friendly and good customer service. 25.8% showed their appreciation towards the local tourism office for their assistance and 24.3% said that the Cape Overberg is a fantastic tourism destination. 0.2% indicated that they will definitely return to the destination for another visit.

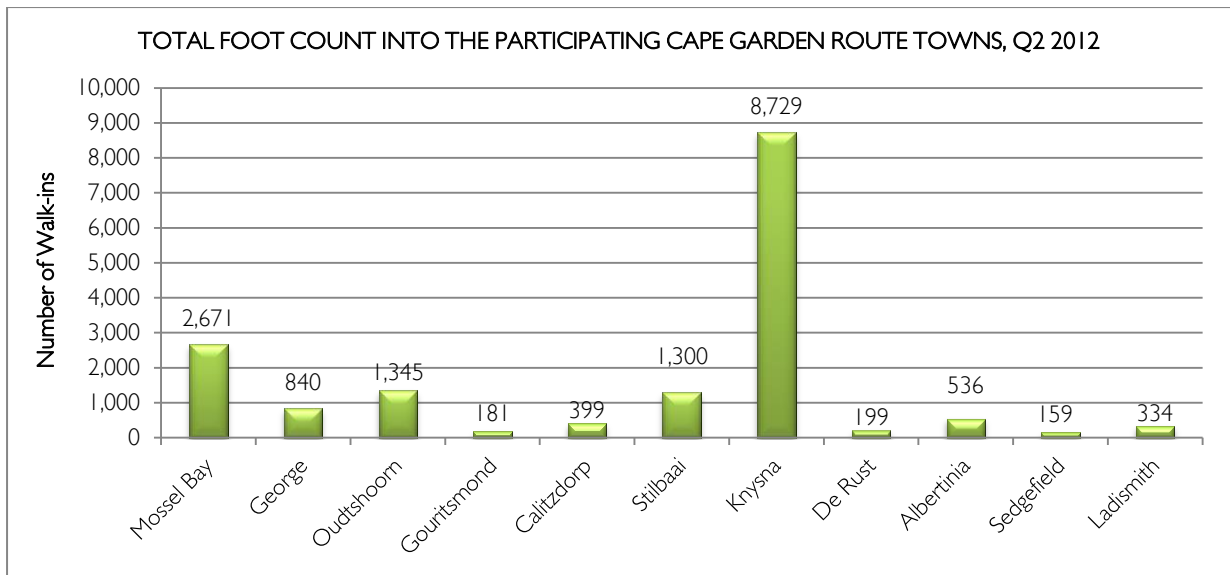
## 9. Garden Route & Klein Karoo

### 9.1 Garden Route & Klein Karoo Trends

#### 9.1.1 Foot count

The foot count is the number of walk-ins received by participating towns in the Cape Garden Route and Klein Karoo, which was a total of **16,693** in Q2 2012: April (6,798), May (5,235) and June (4,660). Knysna received 8,729 walk-ins, followed by Mossel Bay (2,671), Oudtshoorn (1,345), Stilbaai (1,300), George (840), Albertinia (536), Calitzdorp (399), Ladismith (334), De Rust (199), Gouritsmond (181) and Sedgfield (159).





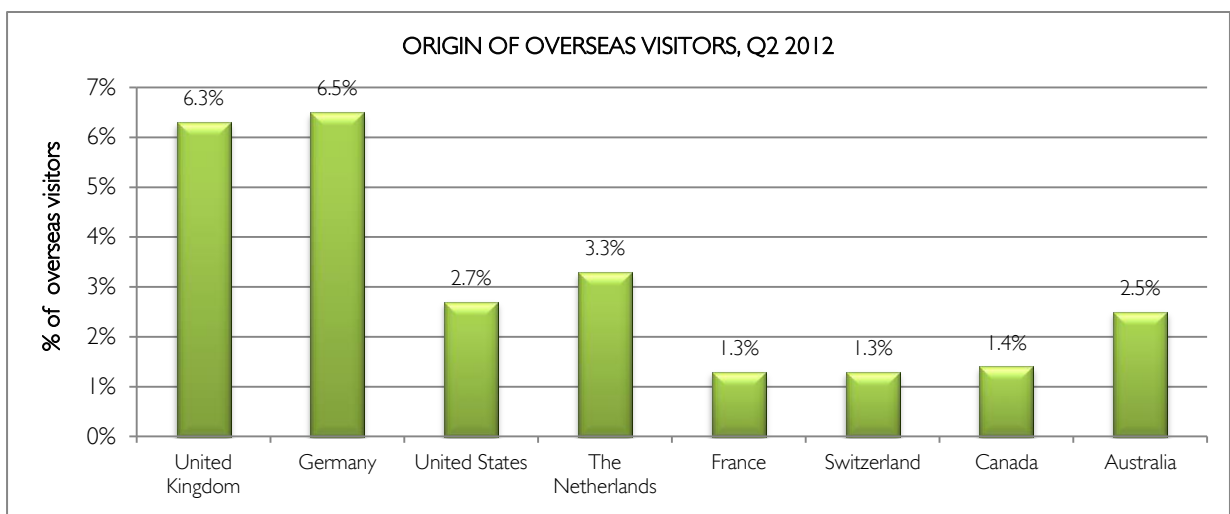
### 9.1.2 Trends and patterns

A total of **553** responses to the Regional Visitor Tracking Survey were received in the Cape Garden Route and Klein Karoo region in Q2 2012. Data were gathered in the months, April (47.7%), May (34.7%) and June (17.5%) in the following participating towns:

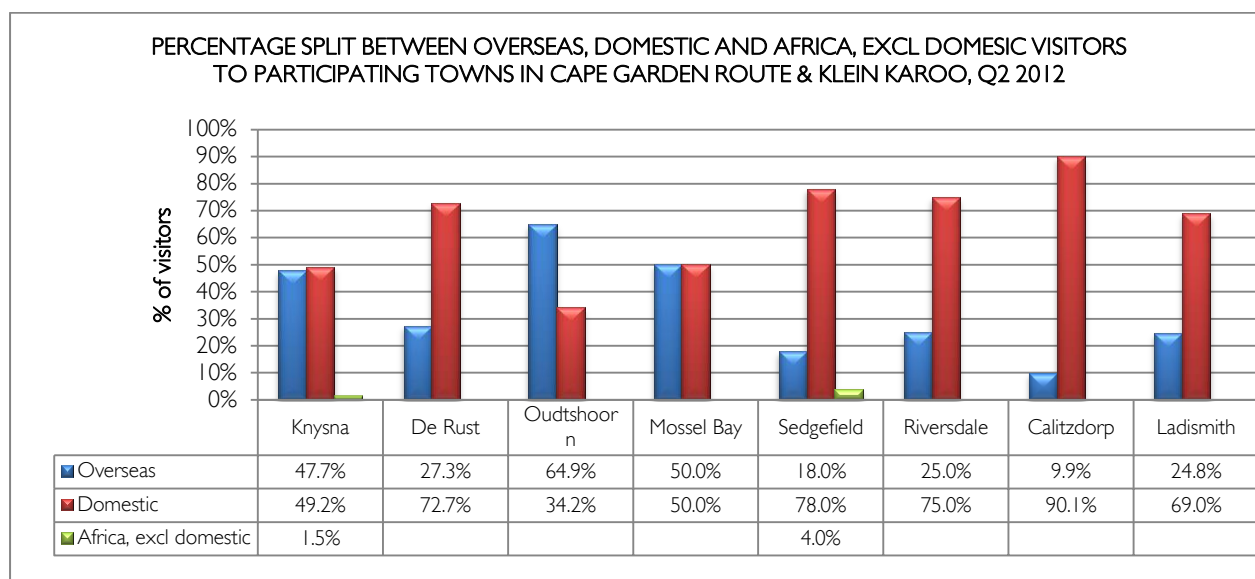
- Calitzdorp (27.3%)
- De Rust (2%)
- Knysna (11.8%)
- Ladismith (26.2%)
- Mossel Bay (2.2%)
- Oudtshoorn (20.1%)
- Riversdale (1.4%)
- Sedgfield (9%)

### 9.1.3 Origin of visitors

Of the visitors to the Cape Garden Route and Klein Karoo region, 31.5% were from overseas, 66% from South Africa and 0.5% from Africa, excluding domestic. 2% did not indicate their region of origin. Of the overseas visitors, 6.5% were from Germany, 6.3% from United Kingdom, 3.3% from the Netherlands, 2.7% from United States, 2.5% from Australia, 1.4% from Canada and 1.3% (each) from France and Switzerland.



Of the domestic visitors, 34.4% from Western Cape, 11.6% originated from Gauteng, 4.9% from Eastern Cape, 1.4% (each) from KwaZulu-Natal and North West, 1.1% from Free State 0.9% from Mpumalanga, 0.5% from Limpopo and 0.2% from Northern Cape. 43.6% of domestic visitors did not indicate their province of origin.



The top three source countries to visit the participating towns in the Cape Garden Route and Klein Karoo region are. South Africa ranked first position in the participating towns, followed by United Kingdom, Germany and the Netherlands.

TOP THREE SOURCE COUNTRIES TO VISIT PARTICIPATING TOWNS IN THE CAPE GARDEN ROUTE & KLEIN KAROO, Q2 2012			
TOWN	FIRST	SECOND	THIRD
Knysna	South Africa (49.2%)	United Kingdom (9.2%)	United States, The Netherlands (6.2% each)
De Rust	South Africa (72.7%)	Germany, United States, the Netherlands (9.1% each)	-
Oudtshoorn	South Africa (34.2%)	United Kingdom (12.6%)	Germany (11.7%)
Mossel Bay	South Africa (50%)	Germany (16.7%)	United Kingdom, United States, Canada, Australia (8.3% each)
Sedgefield	South Africa (78%)	Germany (6%)	Australia (4%)
Riversdale	South Africa (75%)	United Kingdom (25%)	-
Calitzdorp	South Africa (90.1%)	United Kingdom (4.6%)	Germany, the Netherlands (2% each)
Ladismith	South Africa (69%)	Germany (7.6%)	United Kingdom (3.4%)

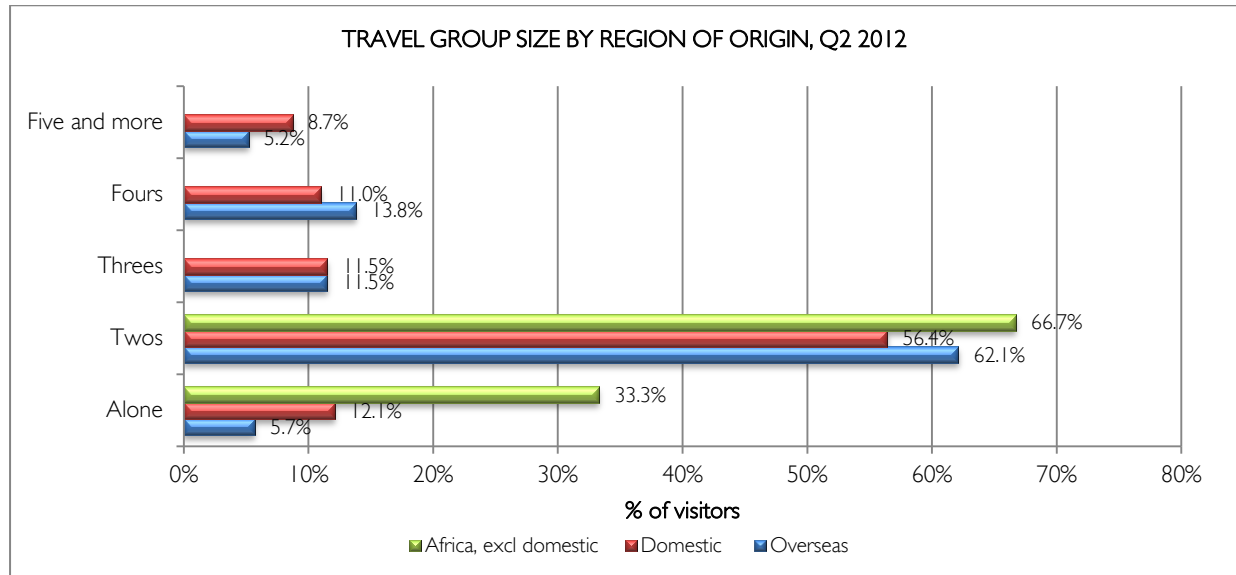
In the table below the top three domestic visitors' province of origin in the participating towns are shown. Western Cape ranked first position amongst the participating towns, followed by Gauteng, Eastern Cape, KwaZulu-Natal and Mpumalanga.

TOP THREE DOMESTIC VISITORS' PROVINCE OF ORIGIN TO VISIT PARTICIPATING TOWNS IN THE CAPE GARDEN ROUTE & KLEIN KAROO, Q2 2012			
TOWN	FIRST	SECOND	THIRD
Knysna	Western Cape (26.2%)	Gauteng (12.3%)	Eastern Cape, Free State (3.1% each)
De Rust	Western Cape, Gauteng (27.3% each)	Eastern Cape, Mpumalanga (9.1% each)	-
Oudtshoorn	Western Cape (23.4%)	Gauteng (7.2%)	Eastern Cape (1.8%)
Mossel Bay	Western Cape, Gauteng (16.7% each)	Eastern Cape, KZN, (8.3% each)	-
Sedgefield	Western Cape (30%)	Eastern Cape (22%)	Gauteng (12%)
Riversdale	-	-	-
Calitzdorp	Western Cape (46.4%)	Gauteng (9.9%)	Eastern Cape (4%)
Ladismith	Western Cape (39.3%)	Gauteng (15.2%)	North West (4.1%)

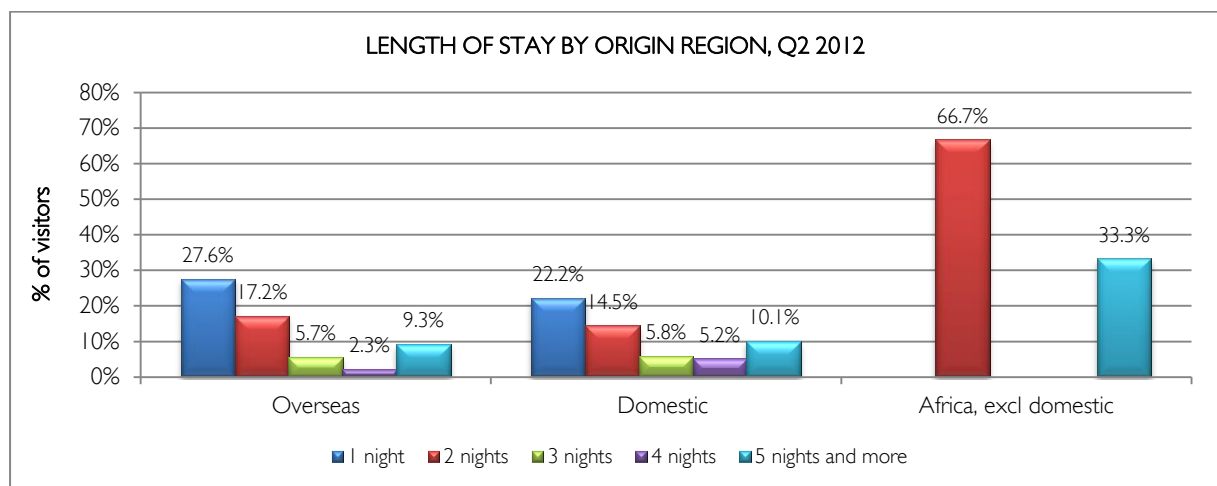
### 9.1.4 Travel group size and length of stay

Of the visitors to the region 10.1% travelled alone, 58.4% in pairs, 11.4% in threes, 11.9% in fours and 17.5% in groups of five and more. 0.7% did not indicate their travel group size. The average travel group size was three and the most common was two in the region.

5.7% of overseas visitors travelled alone, 62.1% in pairs, 11.5% in threes, 13.8% in fours and 5.2% in groups of five and more. 12.1% of domestic visitors travelled alone, 56.4% in pairs, 11.5% in groups of three, 11% in groups of four and 8.7% in groups of five and more.



The visitors were asked whether they stayed overnight in the Cape Garden Route and Klein Karoo region and 59.1% said that they stayed overnight and 40.9% were day visitors. The average length of stay was four nights and the most common was one night. 24.1% of visitors stayed overnight for one night, 15.4% for two nights, 5.6% for three nights, 4.2% for four nights and 9.8% for five nights and more.



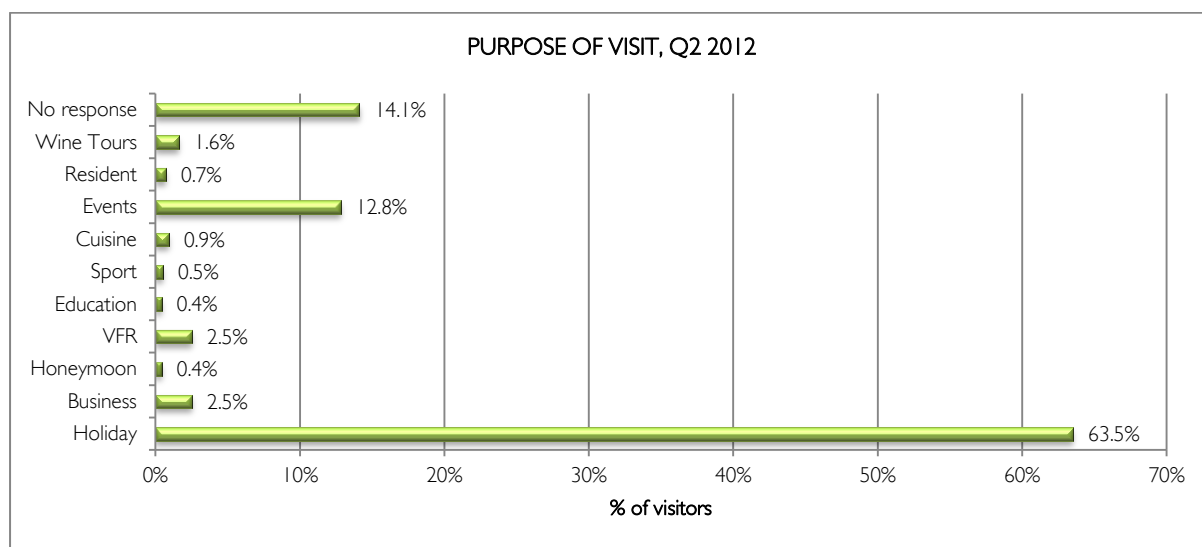
The overseas visitors stayed an average of five nights and the most common was one night. 62.1% of overseas visitors stayed overnight in the region while 37.9% were day visitors. Of the overseas visitors, 27.6% stayed overnight for one night, followed by those who stayed for two nights (17.2%), three nights (5.7%), four nights (2.3%) and five nights and more (9.3%).

The average length of stay for the domestic visitors was three nights and the most common was one night. 57.8% of domestic visitors stayed overnight and 42.2% were day visitors to the region. 22.2% of domestic visitors stayed for one night, 14.5% for two nights, 5.8% for three nights, 5.2% for four nights and 10.1% for five nights and more.

AVERAGE TRAVEL GROUP SIZE AND LENGTH OF STAY (NIGHTS) BY PARTICIPATING CAPE GARDEN ROUTE & KLEIN KAROO TOWNS, Q2 2012								
TOWN	AVERAGE GROUP SIZE				AVERAGE LENGTH OF STAY (NIGHTS)			
	OVERSEAS	DOMESTIC	AFRICA, EXCL DOMESTIC	ALL	OVERSEAS	DOMESTIC	AFRICA, EXCL DOMESTIC	ALL
Knysna	3.4	4.4	1.0	3.9	5.2	5.3	7.0	5.2
De Rust	2.0	2.5	-	2.4	2.5	3.1	-	3.0
Oudtshoorn	2.4	2.7	-	2.5	4.6	1.7	-	3.7
Mossel Bay	2.5	3.0	-	2.8	2.5	6.0	-	5.1
Sedgefield	3.0	3.3	2.0	3.2	6.6	4.3	2.0	4.6
Riversdale	2.0	1.8	-	1.9		5.0	-	5.0
Calitzdorp	2.1	2.7	-	2.7	14.5	2.8	-	3.1
Ladismith	2.8	2.2	-	2.4	1.0	1.8	-	1.8

### 9.1.5 Main purpose of visit and mode of transport

The main purpose for visiting the Cape Garden Route and Klein Karoo in Q2 2012 was to go on a holiday (63.5%), attending events, visiting friends and relatives and on business trips (2.5% each), to experience the local cuisine (0.9%), attend sporting events or participation (0.5%) and for honeymoon and educational purposes (0.4% each). 0.7% were residents requiring information from the local tourism office and 14.1% did not indicate their main purpose of visit to the region.



81.6% of the overseas visitors came to the region to have a holiday, 3.4% visiting friends and relatives, 2.3% went on wine tours in the region, and 0.6% (each) came for business, education, explore local cuisine and attend events.

54.2% of the domestic visitors came for holiday, 19.2% came to attend events in the region, 3.6% came for business, 1.9% visited friends and relatives and 1.4% had a wine tour experience.

PURPOSE OF VISIT BY PARTICIPATING TOWNS IN THE CAPE GARDEN ROUTE & KLEIN KAROO, Q2 2012						
TOWN	HOLIDAY	BUSINESS	HONEYMOON	VFR	WINE TOURS	CUISINE
Knysna	76.9%	1.5%	1.5%	1.5%	-	-
De Rust	90.9%	-	-	-	-	-
Oudtshoorn	92.8%	1.8%	-	2.7%	0.9%	-
Mossel Bay	83.3%	8.3%	-	8.3%	-	-
Riversdale	87.5%	-	-	-	-	-
Calitzdorp	39.1%	1.3%	-	-	5.3%	2
Ladismith	77.2%	5.5%	0.7%	6.2%	0.7%	1.1%

91.5% of visitors travelled by car, followed by those who travelled by bus (2.2%), by motorcycle (0.5%), by taxi (0.2%). 88.5% of overseas visitors and 92.9% of domestic visitors travelled by car to the region.

### 9.1.6 General comments about the Garden Route & Klein Karoo

The visitors were given the opportunity to provide feedback regarding their experience in the Cape Garden Route and Klein Karoo region and 23.7% showed their thanks and appreciation for the assistance provided from the staff at the local tourism office. 20.6% indicated that this is a fantastic tourist destination and 0.9% will definitely return for another visit. 2.5% provided positive comments concerning the tourism products.

## 10. Acknowledgements

Acknowledgements and many thanks go to the following for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating local tourism offices in the following regions:

- Cape Town
- Cape Winelands
- Cape Garden Route & Klein Karoo
- Cape Overberg
- Cape Karoo
- Cape West Coast

The participating indicators and attractions in Cape Town and the Western Cape:

- ACSA (Cape Town International Airport)
- ACSA (George Airport)
- Cape Town Harbour
- Kirstenbosch National Botanical Garden
- Table Mountain Aerial Cableway
- Table Mountain National Park: Boulders and Cape of Good Hope
- V&A Waterfront
- Cango Caves
- Capri Tours & Helicopters
- Department of Cultural Affairs and Sport: Museum Service
- Cape Agulhas attractions
  - De Hoop Nature Reserve
  - De Mond Nature Reserve
  - Cape Agulhas Lighthouse
  - Shipwreck Museum
- South African National Parks
  - Cape Agulhas National Park
  - Bontebok National Park
  - Wildemess National Park
  - Tsitsikamma National Park
  - Karoo National Park
  - West Coast National Park