CAPE TOWN
& Western Cape

WESTERN CAPE TOURISM BAROMETER

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The Provincial Tourism Intelligence Source

IN THIS ISSUE

GLOBAL TRENDS

Global international tourism arrivals reached 898 million in 2007 representing 6% year-on-year growth. All the different regions achieved annual growth well above their long-term forecast. The Middle East with 13% year-on-year growth led the regional growth ranking, followed by Asia and the Pacific (10%), Africa (8%), Americas (5%) and Europe with 4%.

The Middle East received a total of 46 million international tourist arrivals despite continuous tensions and threats. According to UNWTO (2008) the Middle East region is emerging as a strong tourism destination with visitor numbers increasing faster than for the world total. Saudi Arabia and Egypt are the leading Middle East destinations. Asia and the Pacific had 185 million international arrivals with some countries such as Malaysia (20%), Cambodia (19%) and Indonesia (15%) attaining double digit growth.

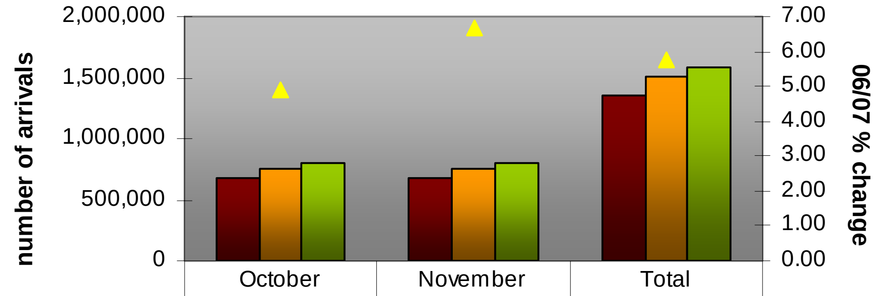
Africa received 44 million international arrivals in 2007 and achieved an average annual growth rate of 7% since 2000. In 2007 international arrivals to North Africa grew by 8% and to Sub-Saharan Africa by 7%. Awareness of Southern African countries has grown especially for South Africa in the build up to the 2010 FIFA World Cup. The Americas achieved 5% annual growth to 142 million international arrivals in 2007 driven by good performance of North America (UNWTO,2008).

Europe, the world's largest destination region accounting for over 50% of global international arrivals had a total of 480 million international arrivals in 2007, representing 4% year-on-year growth.

NATIONAL TOURISM PERFORMANCE

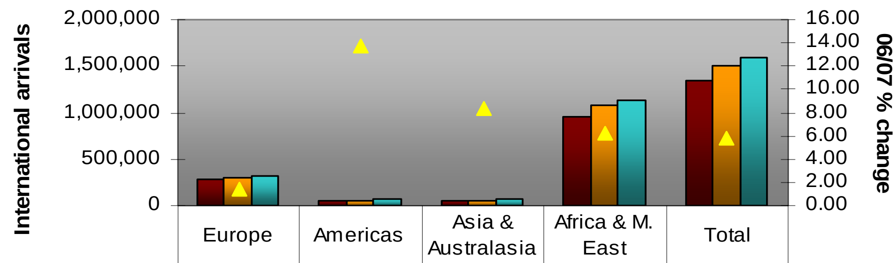
South Africa received 9.07 million international arrivals in 2007 representing about 8% year-on-year growth. There were 2.45 million international arrivals in Q4 2007 from 2.2 million in Q4 2006. Monthly arrivals data shows that there was 4.9% year-on-year growth in October and 6.65% in November (Figure 1).

Figure 1: Q4 2005-2007 International arrivals to South Africa



	October	November	Total
2005	674,458	671,970	1,346,428
2006	755,953	747,050	1,503,003
2007	792,913	796,741	1,589,654
06/07 % change	4.89	6.65	5.76

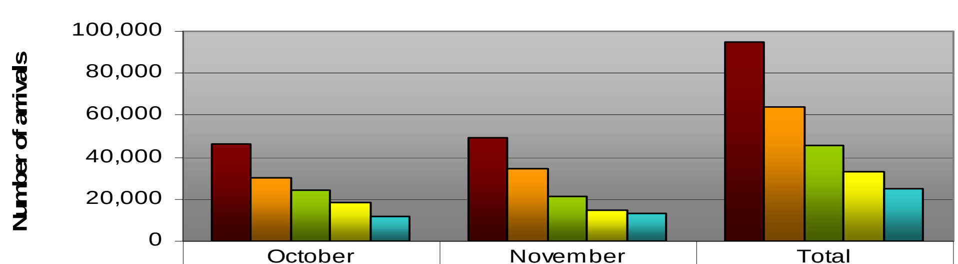
Figure 2: Q4 2005-2007 International arrivals to South Africa by origin region (excluding December)



	Europe	Americas	Asia & Australasia	Africa & M. East	Total
Q4 2005	288,052	51,476	49,685	950,577	1,346,428
Q4 2006	305,853	58,916	57,588	1,074,234	1,503,003
Q4 2007	310,370	66,998	62,395	1,140,842	1,589,654
Q4 06/07 % change	1.48	13.72	8.35	6.20	5.77

There were 1.59 million international arrivals to South Africa in October and November 2007, representing 5.77% growth from the same period in 2006. There was growth from all regions, and the highest year-on-year growth of 13.72% was from the Americas (Figure 2). The United Kingdom was the top overseas source market for South Africa during this period with 95,184 arrivals. Germany with 64,203 arrivals followed in second place and the United States was third (refer to Figure 3).

Figure 3: Q4 2007 Top five overseas source markets for South Africa (excluding December)



	October	November	Total
UK	46,190	48,994	95,184
Germany	29,809	34,394	64,203
USA	24,452	21,355	45,807
Netherlands	18,250	14,968	33,218
France	11,567	13,364	24,931

PROVINCIAL TRENDS

The Western Cape achieved 5.75% growth in international arrivals in Q3 2007 from 374,637 in 2006 to 396,194 in 2007. There were 1.23 million international arrivals to the Western Cape between January and September 2007 representing 1.64% increase from the same period in 2006.

While full figures are still to come, modest growth in international arrivals is anticipated for 2007. Q4 2007 short term lodging statistics for the province show growth in occupancy rates, average room rates and Revenue Per Available Room (RevPAR) (refer to Table 1).

Table 1: Lodging statistics for the Western Cape Province

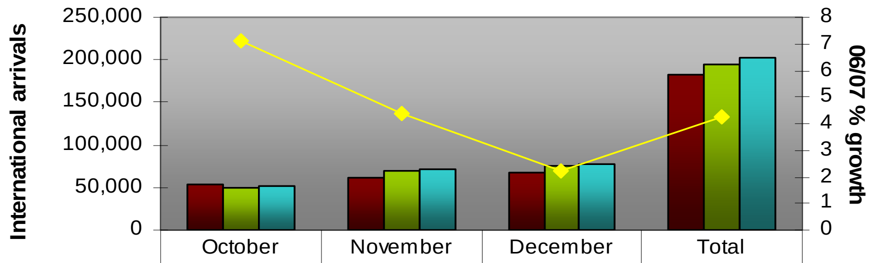
Month/Item	% Occupancy			Average room rate (R)			RevPAR (R)		
	2007	2006	%change	2007	2006	%change	2007	2006	%change
October	66.9	66.5	0.7	735.35	659.77	11.5	492.24	438.70	12.2
November	87	84.2	3.3	874.33	785.86	11.3	760.49	661.5	14.9
December	72	72.1	0.2	909.63	904.84	0.5	655.09	652.67	0.4
Q4 2007	75.3	74.3	1.4	839.77	783.49	7.2	635.94	584.29	8.8

(Source: Deloitte HotelBenchmark, 2008)

INDICATORS

ACSA Cape Town International Airport Arrivals

Figure 4: Q4 2005-2007 International arrivals through Cape Town International Airport

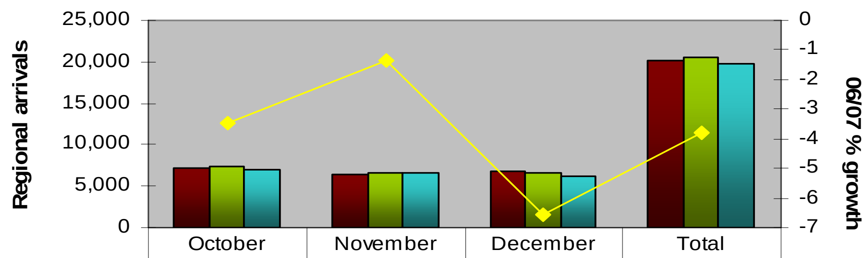


	October	November	December	Total
2005	53,031	61,745	67,404	182,180
2006	48,729	69,035	76,022	193,786
2007	52,202	72,060	77,712	201,974
06/07 % growth	7.13	4.38	2.22	4.23

(Source: ACSA, 2007)

There were a total of 201,974 international arrivals through Cape Town International Airport in Q4 2007, representing 4.23% growth from 193,786 international arrivals in Q4 2006. All three Q4 months showed growth from the previous year.

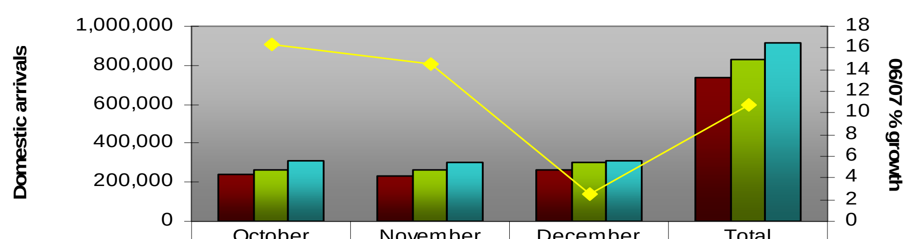
Figure 5: Q4 2005-2007 Regional arrivals through Cape Town International Airport (ACSA,2008)



	October	November	December	Total
2005	7,094	6,337	6,773	20,204
2006	7,271	6,608	6,599	20,478
2007	7,017	6,518	6,165	19,700
06/07 % growth	-3.49	-1.36	-6.58	-3.80

There was 3.80% year-on-year decrease in regional arrivals through Cape Town International Airport in Q4 2007. The highest decrease of 6.58% was recorded in December. Q4 2007 achieved 10.7% increase in domestic arrivals from Q4 of the previous year. Q4 2007 Domestic arrivals through Cape Town International Airport reached 915,452. All Q4 months recorded growth with October registering the highest (16.35%) year-on-year growth among the three Q4 months (Figure 6).

Figure 6: Q4 2005-2007 Domestic arrivals through Cape Town International Airport (ACSA,2008)



	October	November	December	Total
2005	240,277	234,079	264,222	738,578
2006	263,858	260,835	302,218	826,911
2007	306,992	298,558	309,902	915,452
06/07 % growth	16.35	14.46	2.54	10.7

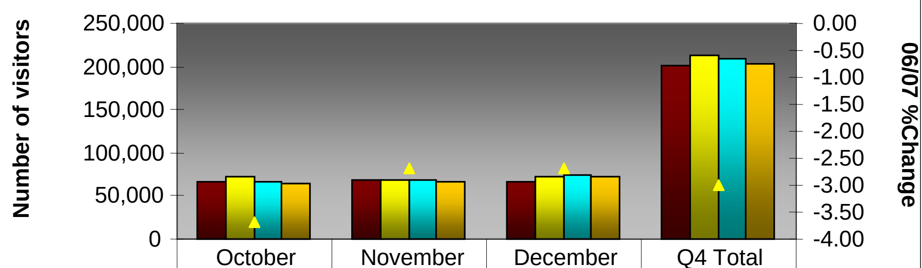
ATTRACTIONS

Kirstenbosch Botanical Gardens

Kirstenbosch Botanical Gardens experienced a 3% decrease in visitation in Q4 2007 from the same period in 2006.

Decrease was recorded in all the three Q4 months with October having the highest decrease of 3.68%.

Figure 7: Q4 2007 visitation to Kirstenbosch Botanical Garden

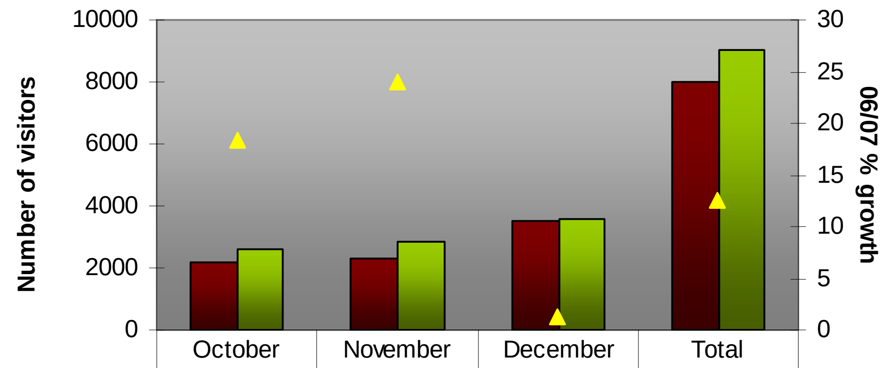


	October	November	December	Q4 Total
2004	65,949	68,582	66,849	201,380
2005	71,978	68,669	72,741	213,388
2006	66,465	68,060	74,166	208,691
2007	64,016	66,224	72,172	202,412
06/07 %Change	-3.68	-2.70	-2.69	-3.01

(Source: Kirstenbosch Botanical Garden, 2007)

Worcester Living Open-Air Museum at Kleinplasie

Figure 8: Q3 2007 Worcester Living Open-Air Museum at Kleinplasie



	October	November	December	Total
2006	2201	2300	3502	8003
2007	2605	2854	3546	9005
06/07 % growth	18.36	24.09	1.26	12.52

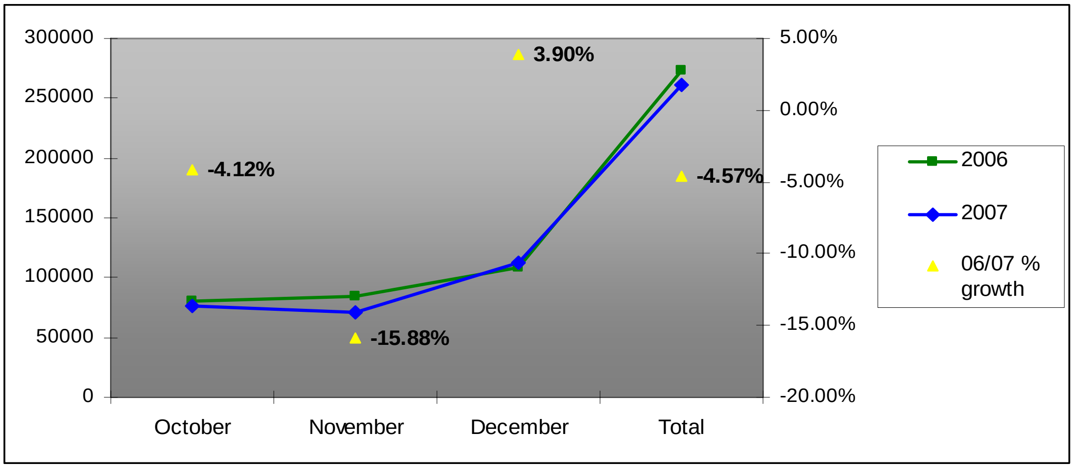
(Source: Worcester Living Open-Air Museum, 2007)

The Worcester Living Open-Air Museum at Kleinplasie received 9005 visitors in Q4 2007 12.52% more than Q4 the previous year. All the months recorded positive year-on-year growth: 18.36% in October; 24.09% in November and 1.26% in December.

Table Mountain Aerial Cableway

Visitation to Table Mountain through the aerial cableway declined by 4.57% in Q4 2007 compared to the same period in 2006. October and November both recorded a decrease of 4.12% and 15.88% respectively (Figure 9). December, with 3.90% growth, was the only Q4 month with positive growth in 2007.

Figure 9: Q4 2006/2007 visitation to Table Mountain through Aerial Cableway

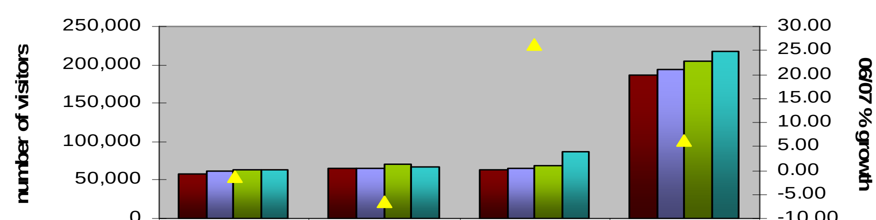


(Source: Table Mountain Cableway, 2007)

Table Mountain National Park: Boulders

Table Mountain National Park: Boulders received a total of 217,028 visitors in Q4 2007 representing 6.12% growth from Q4 2006. December recorded double digit growth of 26% masking the negative year-on-year growth of 1.4% and 6.6% recorded in the other two Q4 months of October and November respectively.

Figure 10: Q4 2004- 2007 visitation to Table Mountain National Park: Boulders

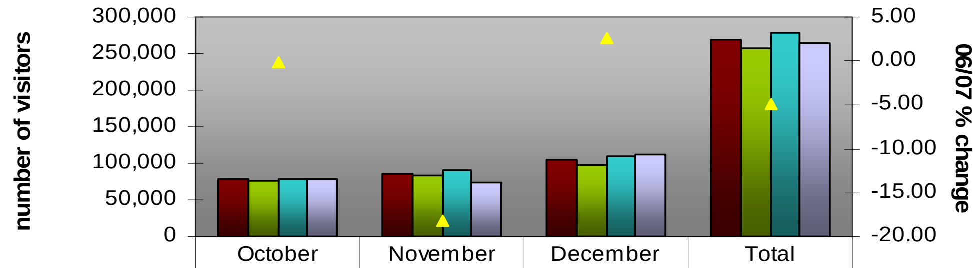


	October	November	December	Total
2004	57,428	64,977	63,532	185,937
2005	61,665	65,904	65,394	192,963
2006	63,872	71,311	69,320	204,503
2007	62,965	66,592	87,471	217,028
06/07 % growth	-1.42	-6.62	26.18	6.12

(Source: Table Mountain National Park, 2007)

Table Mountain National Park: Cape of Good Hope

Figure 11: Q4 2004-2007 visitation to Table Mountain National Park: Cape of Good Hope



	October	November	December	Total
2004	77,553	86,690	104,910	269,153
2005	77,146	82,298	97,135	256,579
2006	78,933	90,954	108,391	278,278
2007	78,759	74,433	111,293	264,485
06/07 % growth	-0.22	-18.16	2.68	-4.96

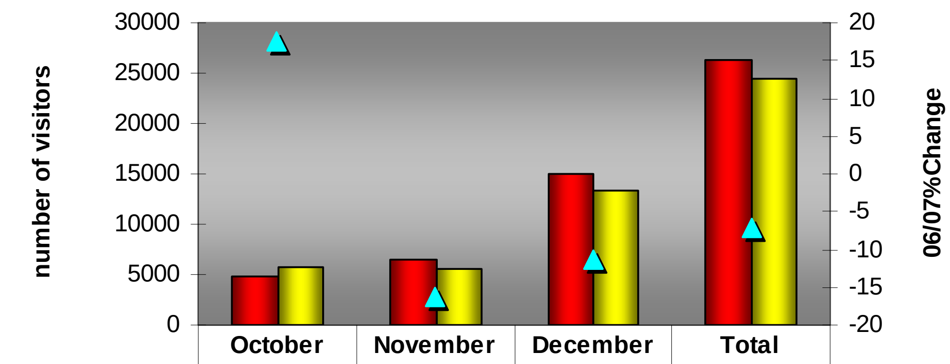
(Source: Table Mountain National Park, 2007)

Table Mountain National Park: Cape of Good Hope received 264,485 visitors in Q4 2007, 4.96% less than Q4 2006. November and October both recorded negative year-on-year growth of 18.16% and 0.22% respectively. December was the only Q4 month posting positive growth of 2.68%.

West Coast National Park

West Coast National Park received 24,447 visitors in Q4 2007. The park experienced an overall 7.24% decline in visitation compared to the same period in 2006. However, double digit growth (17.6%) was recorded for the month of October which coincides with the popular flower season. A decrease in visitation was experienced in November and December of 2007 compared to the same period in 2006. December accounted for the majority of the Q4 2007 visitors to the park (refer to Figure 12).

Figure 12: Visitation to West Coast National Park (Source: West Coast National Park, 2008)



	October	November	December	Total
2006	**4842**	**6551**	**14963**	**26356**
2007	**5693**	**5492**	**13262**	**24447**
06/07%Change	**17.6**	**-16.2**	**-11.4**	**-7.24**

Table 2: Q4 2007 West Coast National Park visitation statistics

Visitor Information	October	November	December	Totals
Overnight Guests 2006	803	858	928	2,589
Overnight Guests 2007	1,216	1,022	452	2,690
06/07%Change	**51.43**	**19.11**	**-51.29**	**3.9**
Day Guests 2006	2,813	3,837	12,698	19,348
Day Guests 2007	3,148	2,785	11,718	17,651
06/07%Change	**11.91**	**-27.42**	**-7.72**	**-8.77**
International Guests 2006	1,226	1,856	1,337	4,419
International Guests 2007	1,329	1,685	1,092	4,106
06/07%Change	**8.4**	**-9.21**	**-18.32**	**-7.08**
Domestic Guests 2006	3,616	4,695	13,626	21,937
Domestic Guests 2007	4,364	3,807	12,170	20,341
06/07%Change	**20.69**	**-18.91**	**-10.69**	**-7.28**

(Source: West Coast National Park, 2008)

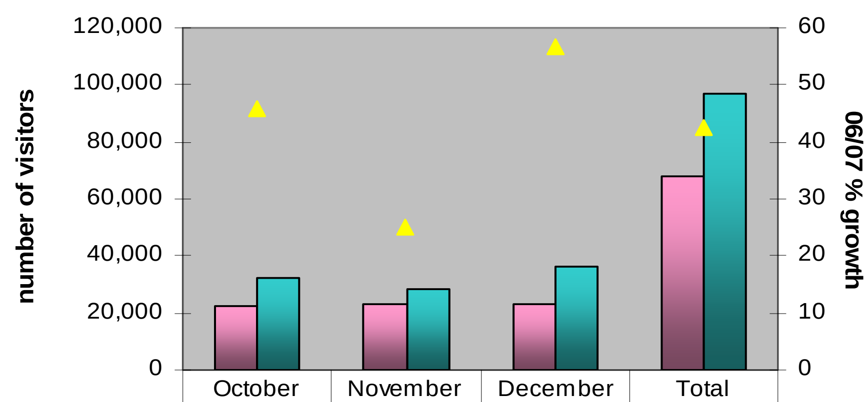
Table 2 above provides a breakdown of the number of visitors to West Coast National Park during Q4 2007. Overnight guests increased for the months of October (51.43%) and November (19.11%), while a decline (-51.29%) was experienced in December. There was an overall 3.9% year-on-year increase in overnight visits in Q4 2007.

An increase in day visits was recorded in October. November with -27.42% and December (-7.72%) both recorded a decrease in day visits. Overall, the park experienced 8.77% decrease in day visits. However, an increase in international visitors was recorded in October (8.4%), but the other two Q4 months recorded a decrease in international visitors (refer to Table 2).

Robben Island

Robben Island experienced a remarkable double digit year-on-year growth of 42.57% in Q4 2007. The highest growth of over 50% was recorded in December (Figure 13)

Figure 13: Q4 2006-2007 visitation to Robben Island

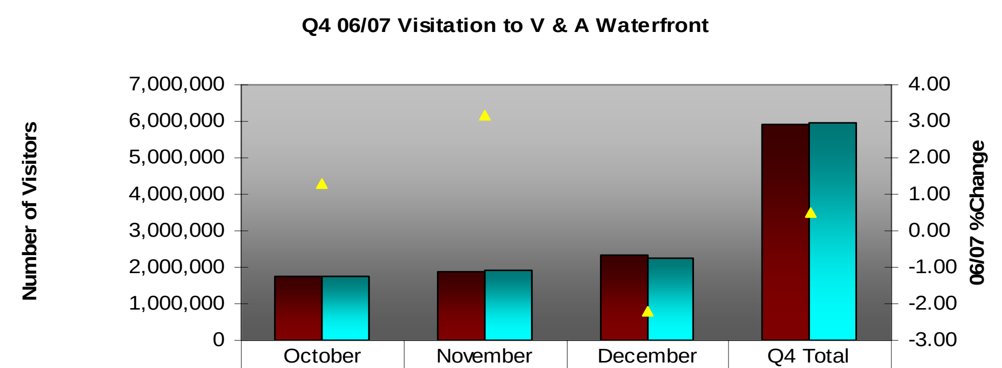


	October	November	December	Total
2006	22,354	22,782	22,980	68,116
2007	32,574	28,498	36,042	97,114
06/07 % growth	45.72	25.09	56.84	42.57

(Source: Robben Island, 2007)

V& A Waterfront

Figure 14: Q4 2007 V&A Waterfront



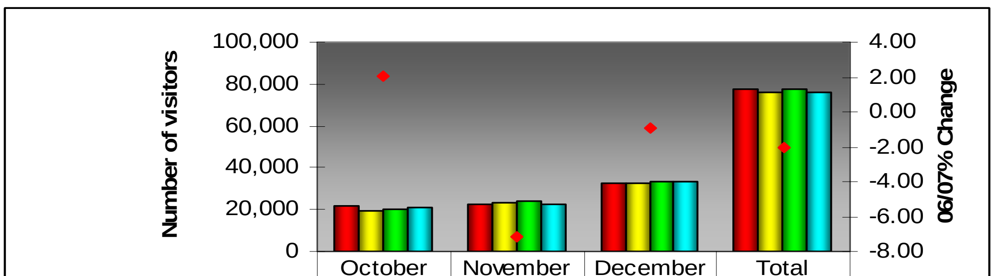
	October	November	December	Q4 Total
2006	1,747,012	1,865,378	2,321,142	5,933,532
2007	1,769,739	1,924,345	2,270,199	5,964,283
06/07 %Change	1.30	3.16	-2.19	0.52

(Source: V&A Waterfront, 2007)

In Q4 2007 the V&A Waterfront experienced a slight increase of 0.52% from Q4 2006. December was the only Q4 month that experienced a decline of 2.19%.

Visitation to Cango Caves

Figure 15: Q4 2004-2007 Visitation to Cango Caves



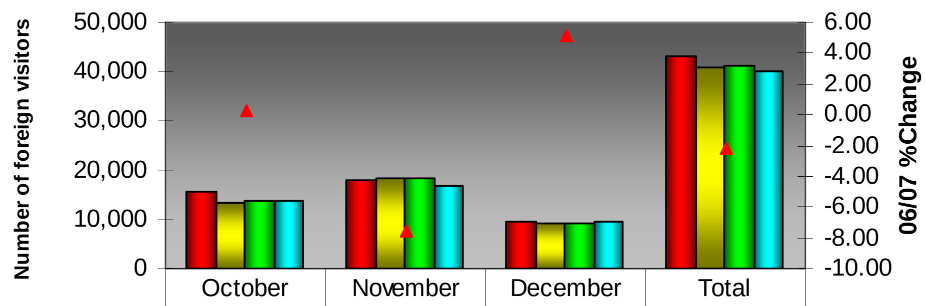
	October	November	December	Total
2004	21,982	22,670	32,730	77,382
2005	19,482	23,643	32,857	75,982
2006	20,391	24,041	33,266	77,698
2007	20,800	22,321	32,957	76,078
06/07 %Change	2.01	-7.15	-0.93	-2.08

(Source: Cango Caves, 2008)

In Q4 2007 Cango Caves experienced a slight (2.08%) decrease in visitation from the same period in 2006. October was the only Q4 2007 month that experienced year-on-year growth.

Figure 16 below illustrates visitation to Cango Caves by foreign nationals. November was the only Q4 month with negative year-on-year change in visitation. December recorded the highest growth of 5.11%. There, however, was overall negative year-on-year change (-2.13%) in number of foreign visitors due to poor performance in October and November.

Figure 16: Q4 2004-2007 visitation to Cango Caves



	October	November	December	Total
2004	15,604	18,118	9,383	43,105
2005	13,233	18,481	9,081	40,795
2006	13,862	18,271	8,994	41,127
2007	13,906	16,891	9,454	40,251
06/07 %Change	0.32	-7.55	5.11	-2.13

(Source: Cango Caves, 2008)

Q4 2007 CAPE TOWN & WESTERN CAPE VISITOR TRENDS

This section covers an analysis of Western Cape travel and tourism trends by region. This issue includes all Western Cape regions, but the West Coast. The first section discusses overall trends in the Western Cape and the second section covers trends by individual regions.

There were a total of **3,064** responses from the Western Cape in Q4 2007 from the following regions: Cape Winelands, Cape Karoo, Cape Garden Route & Klein Karoo, Cape Overberg, and Cape Town.

Origin of visitors

The United Kingdom was the largest source of overseas visitors, followed by Germany (15.7%), the Netherlands (7%) and Sweden (3%). Other overseas countries in the top ten source markets to the Western Cape included: the United States (2.8%), Switzerland (2.4%), France (2.3), Belgium (2.1%), Canada and Australia (1.7% each) (refer to Figure 17). Of the domestic visitors, most were from the Western Cape (44.4%), followed by Gauteng (33.2%), KwaZulu-Natal (5.9%), Eastern Cape (5.8%), the Free State (3.5%) and others (refer to Figure 18).

Figure 17: Q4 2007 Origin of overseas visitors

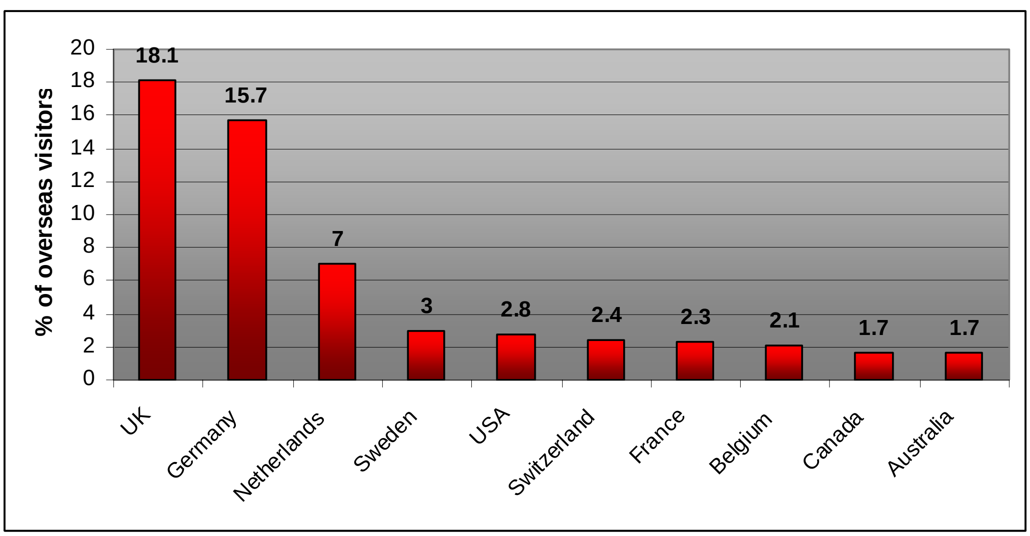
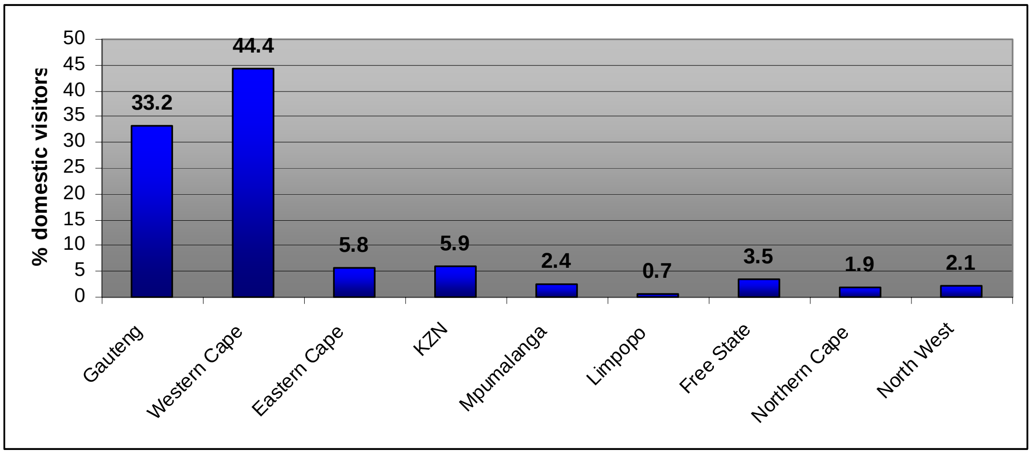


Figure 18: Q4 2007 Domestic visitors' province of origin



Travel group size and length of stay

Figure 19 illustrates travel group sizes of visitors to the Western Cape in Q4 2007. 60.3% travelled in pairs, 10.6% threes. The average travel group size was three and the most common was two. 35.1% of the visitors stayed for one night in the Western Cape towns, 9.2% for two nights and 11.1% for three nights (Figure 20). The overall average length of stay was five nights.

Figure 19: Q4 2007 Travel group size

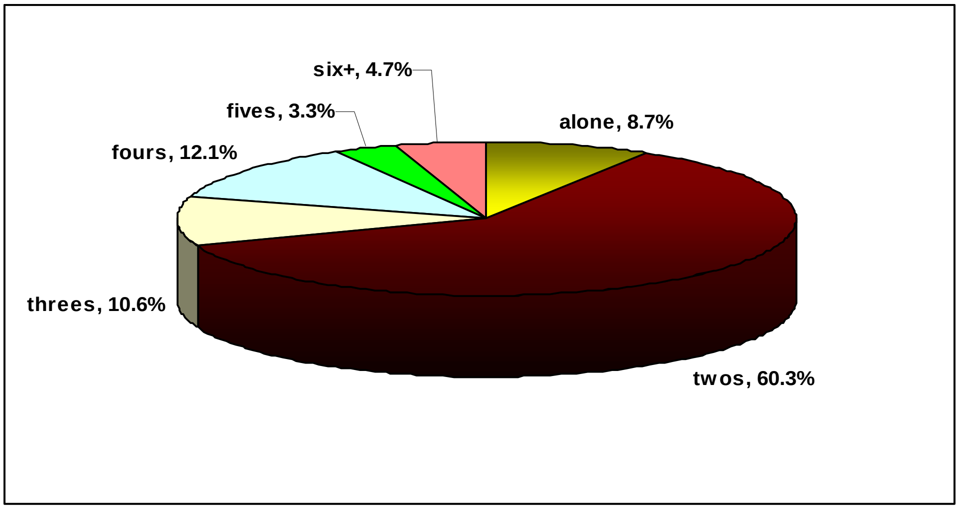
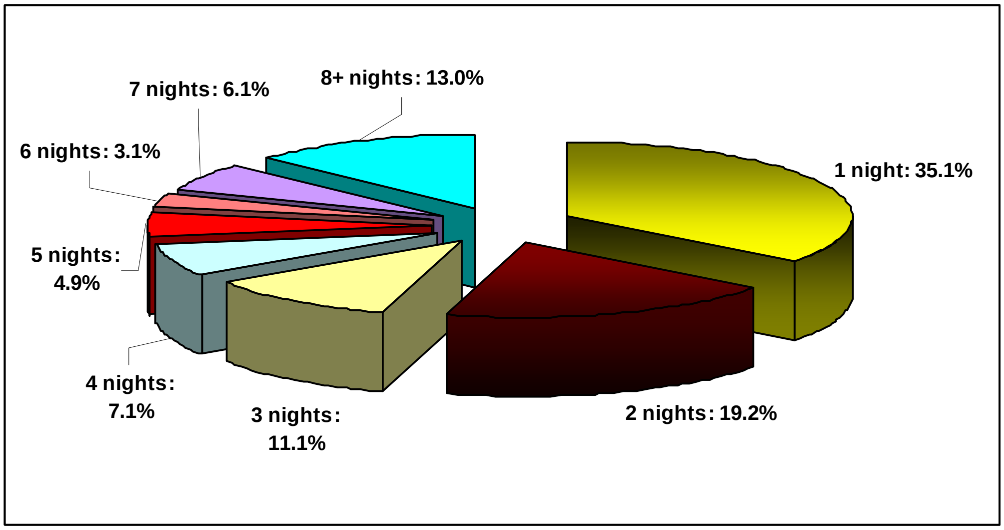


Figure 20: Q4 2007 Length of stay



Even though the most common length of stay in towns was one, the trend varied tremendously between different regions and also by origin region of visitors. Table 3 illustrates the average length of stay in different Western Cape regions by origin of visitor. The length of stay in each region also varied by town and this is discussed under each regional section.

Table 3: Average length of stay in the regions by origin of visitor

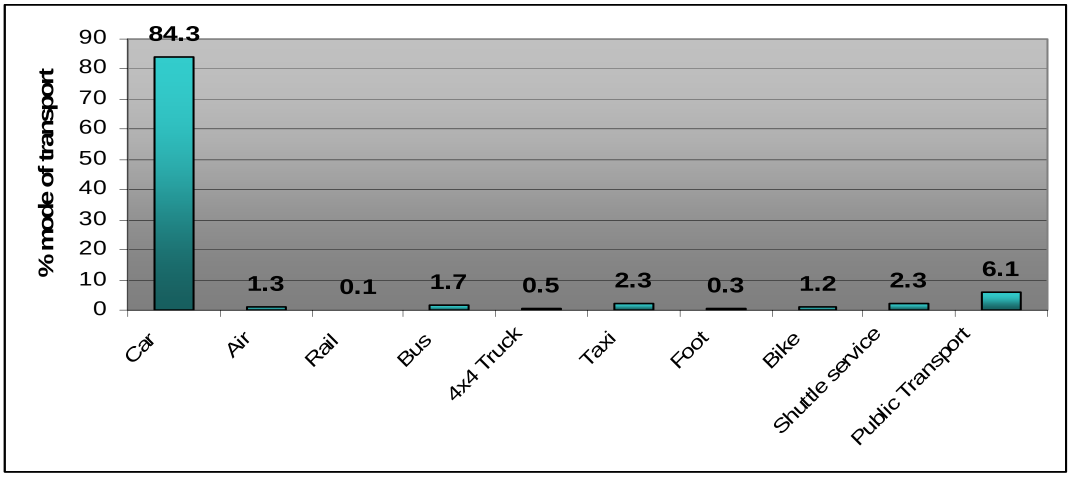
Region	Average length of stay (nights)			
	Overseas	Africa(excluding domestic)	Domestic	All
Cape Town (n=1011)	6.9	5.7	3.2	6.3
Cape Garden Route (n=381)	1.9	-	3.4	2.5
Cape Winelands (n=679)	3.6	-	2.9	3.3
Cape Overberg (n=236)	2	-	2.9	2.3

Blank spaces indicate inadequate responses from that group to make conclusions

Main purpose of visit and mode of transport

Most (94%) of visitors to the Western Cape indicated that their main purpose for visiting was holiday, followed by business (3.6%), honeymoon (0.9%), visiting friends and relatives (0.7%) and others. Most visitors (84.3%) made use of cars as their mode of transport, followed by public transport with 6.1%.

Figure 21: Q4 2007 Mode of transport



Q4 2007 CAPE TOWN REGIONAL TRENDS

There were a total of 1171 responses obtained from the Cape Town Region in Q4 2007 from the following visitor information centres (VIC's): Cape Town Burg Street, Waterfront Gateway, Somerset West, Muizenberg/Simonstown, Cape Town International Airport (CTIA) international and domestic terminals, Blaauwberg, Willowbridge, Kirstenbosch, Hout Bay, Tygervalley and Table Mountain.

Origin of visitors

The majority (82.9%) of visitors were from overseas, followed by domestic (14.7%) and Africa (excluding domestic) (2.4%) (refer to Figure 22). UK was the largest (25.4%) source market, followed by Germany (16.2%), and South Africa accounting for 14.6%. Other top source countries included the Netherlands (5.5%), Sweden (5.2%) and USA with 3.8%. Of the domestic visitors, most were from Guateng (50%). The Western Cape followed with 16.7%, a further 15.2% were from KwaZulu-Natal, 8% from Eastern Cape and others (refer to Figure 23).

Figure 22: Origin region of visitors

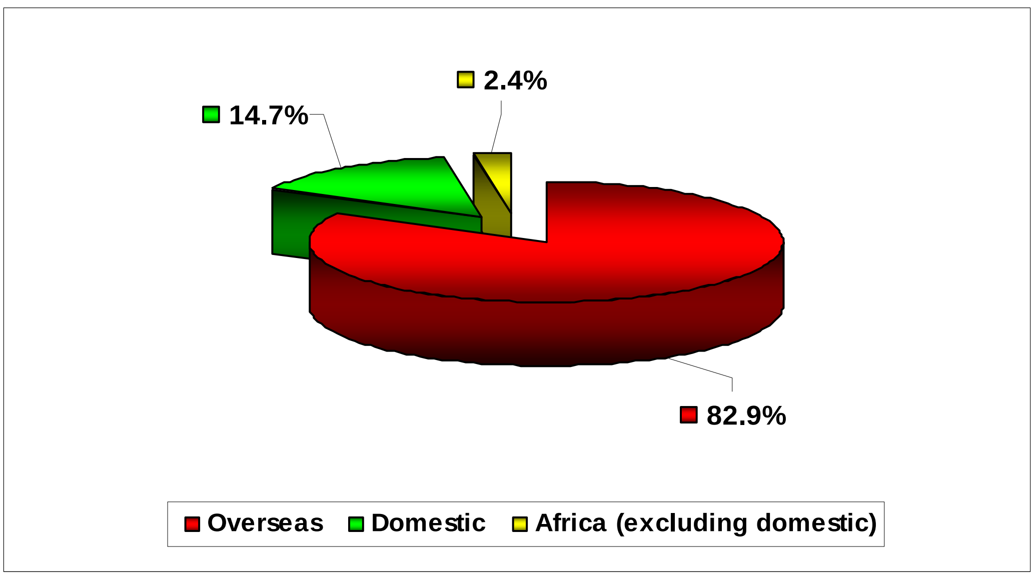
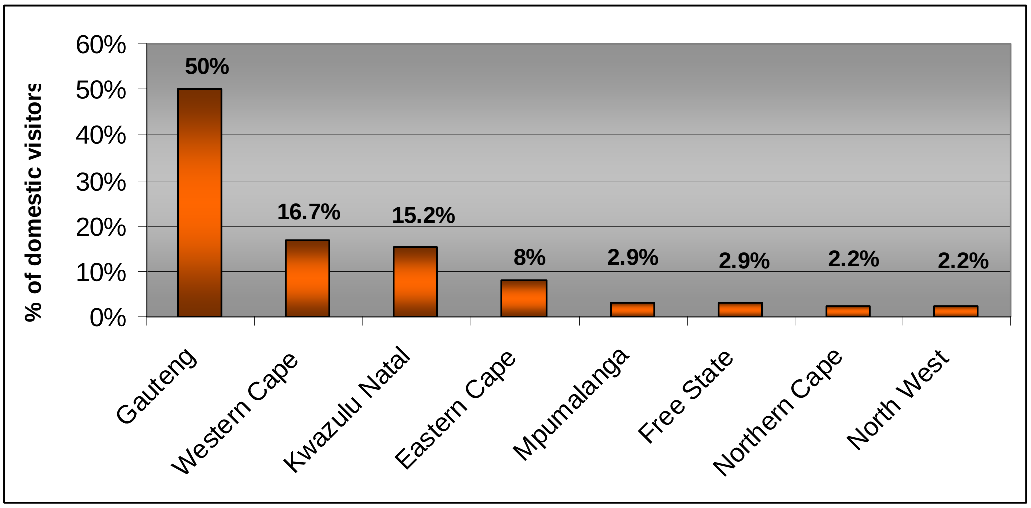


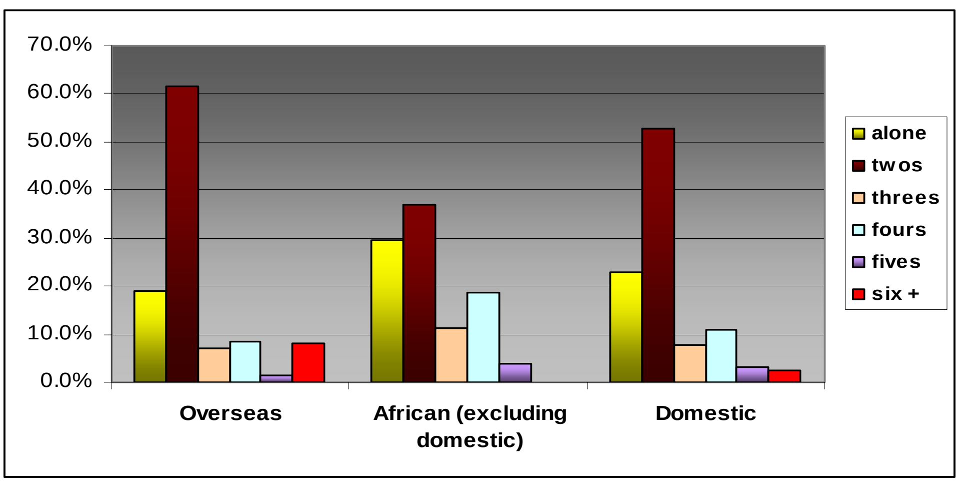
Figure 23: Q4 2007 Domestic visitors' province of origin



Travel Group size and length of stay

The average as well as the most common travel group size for Cape Town was two. 59.6% travelled in pairs, 19.9% alone, 8.9% in fours and 7.4% in three's. Of the overseas visitors, majority (61.4%) travelled in pairs and 19.1% travelled alone. 52.6% of domestic visitors travelled in pairs and 22.7% alone. Of the African (excluding domestic) visitors, 37% travelled in pairs and 29.6% alone (Figure 24).

Figure 24: Travel group size by origin region



The majority (86.3%) of visitors stayed overnight. Of the overseas visitors, 86.6% stayed overnight and 13.4% were day visitors. The majority (86.1%) of domestic visitors stayed overnight and 13.9% visited for the day. Almost all (92.6%) African (excluding domestic) visitors stayed overnight, with only 7.4% day visitors.

12% of the visitors stayed for one night, 11.7% for two nights, 16.7% for three nights and 12.4% for four nights. Of the overseas visitors, 15.6% stayed for three nights, 13.2% for four nights, 11.2% for seven nights and 9.5% stayed for one night. 26.6% of domestic visitors stayed for one night, 25.2% for two nights and 21% for three nights. 24% of African (excluding domestic) visitors stayed for three nights, 16% for two nights and 12% for four nights (Figure 25).

The average length of stay was six nights and the most common was three nights. The findings show that overseas visitors tend to stay longer than both domestic and African (excluding domestic) visitors. .However, the travel group size didn't vary much with origin region of visitor. (Table 4).

Figure 25: Common length of stay by origin region

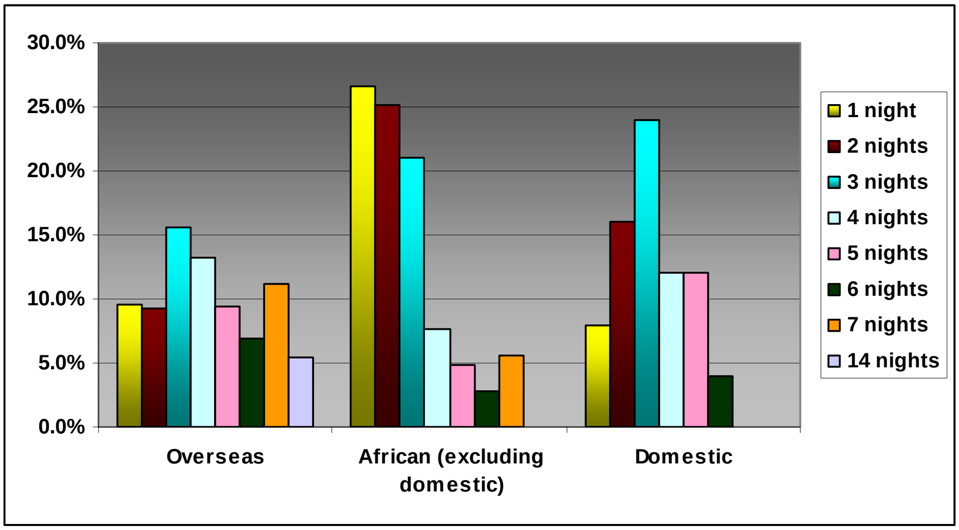


Table 4: Average length of stay and travel group size by origin

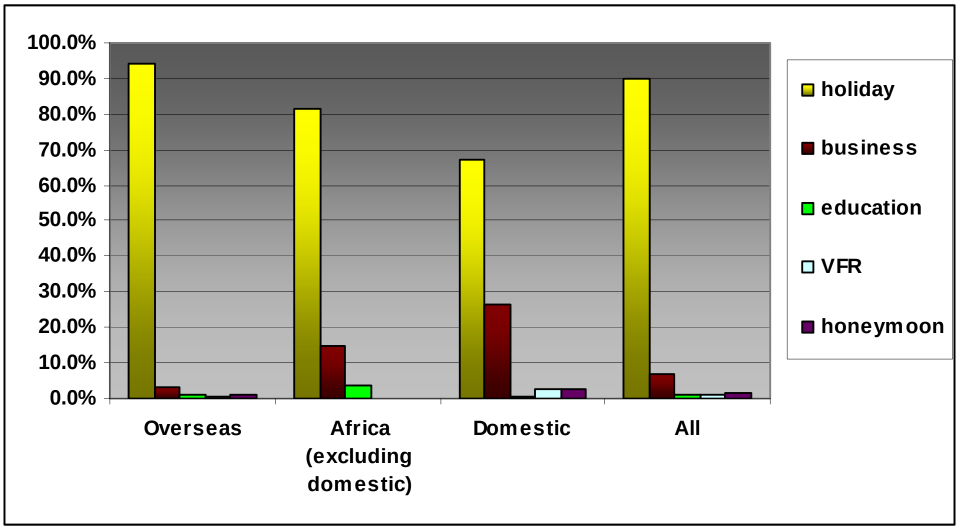
Origin of visitor	Average Length of stay (nights)	Travel group size
Overseas	6.9	2.4
Africa (excluding domestic)	5.7	2.3
Domestic	3.2	2.3
All	**6.3**	**2.4**

Purpose of visit and mode of transport

The main purpose of visit to Cape Town was holiday (89.9%). 6.7% travelled for business, 1.4% for wedding and honeymoon purposes. Of the overseas visitors, almost all (94.4%) visited for holiday and 2.7% for business. Of domestic visitors, 67.4% travelled for holiday, 26.4% for business, 2.8% visited friends and relatives (VFR) and 2.8% were on honeymoon. 81.5% of African (excluding domestic) visitors travelled for holiday, 14.8% for business and 3.7% for education (Figure 26).

The majority (63%) of visitors used cars as their mode of transport, followed by public transport (17.5%), taxi services (6.8%) and shuttle services (6.5%). 61.7% of overseas visitors travelled by car and 20.7% utilised public transport and shuttle services (5.5%). Of the domestic visitors, 77.6% used cars, 11.9% taxis and 8.2% shuttle service. African visitors mostly used cars and shuttle service (26.1% each) and 21.7% used public transport.

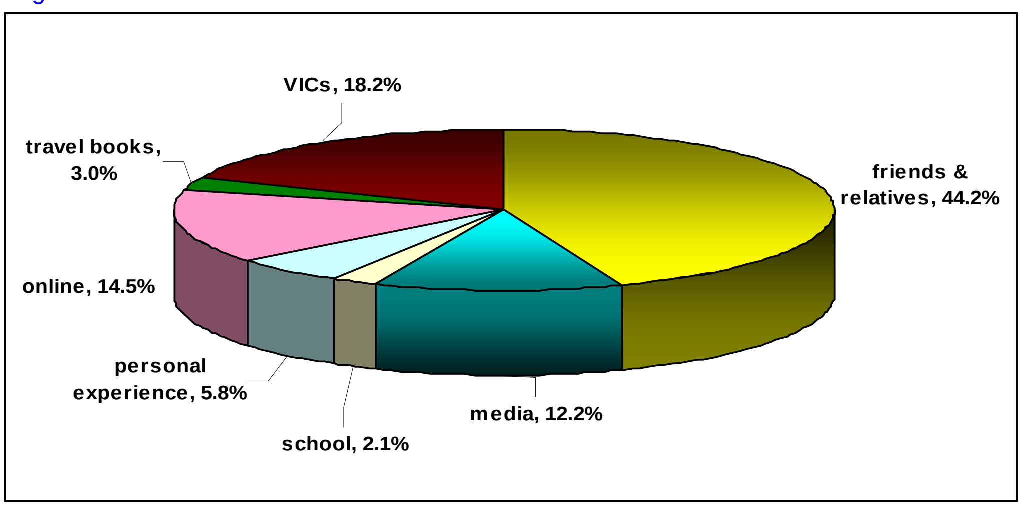
Figure 26: Purpose of visit



Information Sources

Friends and relatives (44.2%) continue to rank top on "how the visitors hear of the destination" and the trend didn't vary much with origin of visitor. 18.2% indicated that visitor information centres (VICs) were their source of information followed by online sources (14.5%), media (12.2%), personal experience (5.8%), travel books (3%) and schools (2.1%) (Figure 27).

Figure 27: Main source of information



46.3% of overseas visitors heard of the destination from their friends and relatives, 16.9% from online sources, 13% from VIC's, 12.4% from the media and 5.4% from personal experience. Of the domestic visitors, 39.3% heard of the destination from friends and relatives, 37.5% from VIC's, 12.5% from the media and 6.3% from personal experience. 36.4% of African visitors heard of the destination from their friends and relatives. A further 22.7% obtained information from VIC's, 13.6% from online sources and personal experience, 9.1% from school and 4.5% from the media. The consistent appearance of personal experience as source of information indicates that the destination enjoys substantial repeat business.

Daily Budget

The average daily budget for this quarter was R742.43. However, the most common daily budget was R500.00. The most common daily budget for overseas visitors was R500.00, R400.00 for domestic visitors and R300.00 for African visitors (Table 5).

Table 5: Daily budget by orign

Origin	Daily budget (Rands)	
	Average	Most common
Overseas	771.73	500
Africa (excluding domestic)	685.38	300
Domestic	677.2	400
All	**742.50**	**500**

Repeat visits

Asked if they would visit again, 60.8% said they would, 38.2% said they might and 1.0% said they would not. The majority across all source markets indicated they would definitely visit Cape Town again. Of the overseas visitors, 55.3% said they would visit again, 43.5% said they might and 1.2% said they would not visit again. Almost all (91.3%) domestic visitors said they would visit again, 8.7% said they might. 84% of African visitors said they would visit again, 16% said they might.

Q4 2007 CAPE TOWN LODGING STATISTICS

A total of 237 responses were received in Q4 2007, equally distributed among the three Q4 months of October, November and December. All the four Cape Town regions were represented as follows: Cape Town Central, 24.1% and 25.3% each for the other three regions (East, North and South). Four lodging categories were represented including: Hotels (25.7%), Guest Houses (23%), Self Catering (27%) and B&Bs (24.3%). Star rating of the participating establishments is presented in figure 28.

The summary for Q4 2007 lodging statistics is presented below:

Average Occupancy: 70.8%

Average room rate: R895.54

RevPAR: R633.59

Forward booking January (as reported in December): 66.5%

Forward booking February (as reported in December): 62.3%

Forward booking March (as reported in December): 60.6%

Figure 28: Star Grading of participating lodging establishments

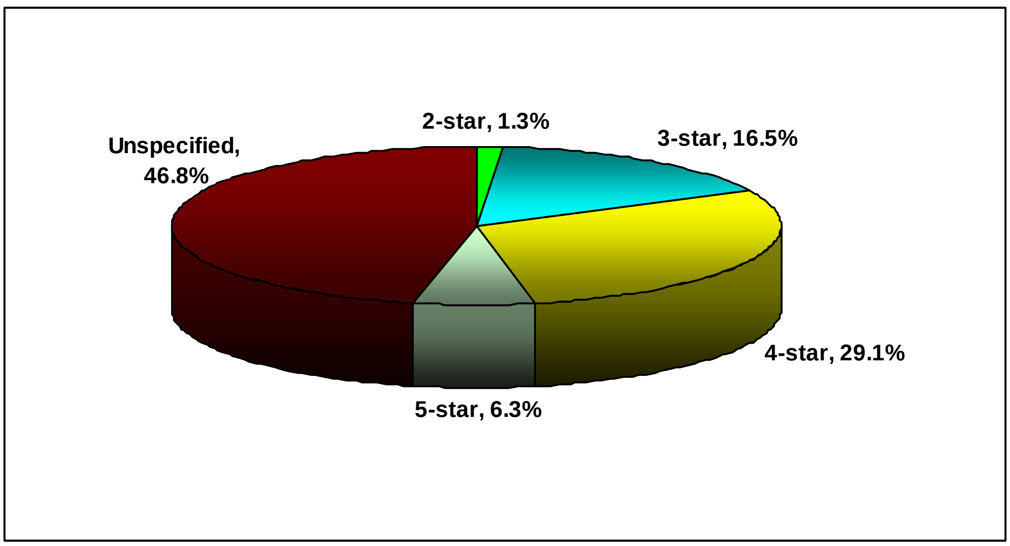


Table 6: Q4 2007 Cape Town lodging statistics by month

Month	Occupancy (%)	Average Room Rate (R)
October	64.6	859.93
November	69.1	891.08
December	78	936.58
All	**70.8**	**895.54**

The month of December achieved both the highest occupancy and average room rates as shown in Table 6. Analysis of the data by Cape Town region showed that Cape Town Central achieved both the highest average room rate (R1,400.63) and occupancy rate (82.91%). Cape Town South had the second highest average room rate (R930.98) while Cape Town East had the second highest occupancy rate (72.68%) (Table 7). However, Cape Town East had the highest percentage forward bookings for the three months following December, followed by Cape Town Central.

Hotels achieved the highest average room rate (R1,480.84) and occupancy rate (79.86%) followed by self-catering establishments. Hotels also had the highest forward booking rates for the three months following December 2007 (Table 8). First quarter 2008 outlook was good as lodging establishments were already over 60% booked for January, February and March 2008 by December 2007.

Table 7: Q4 2007 Lodging statistics by Cape Town Region

Cape Town Region	% Occupancy	Average Room Rate (R)	RevPAR (R)	*%Forward booking 1 month	*%Forward booking 2 months	*%Forward booking 3 months
Central	82.9	1400.63	1161.26	75.2	65.6	57.2
East	72.7	583.83	424.33	76.5	80	79.3
South	59.0	930.98	549.46	57.8	45.4	48.1
North	67.2	617.93	425.31	54.2	50.4	46.6
All	**70.8**	**895.54**	**633.59**	**66.5**	**62.3**	**60.7**

*December as benchmark month

Table 8: Q4 2007 lodging statistics by category of establishment

Category	Average Room Rate (R)	% Occupancy	RevPAR (R)	*% Forward booking 1month	*% Forward booking 2months	*% Forward booking 3months
Hotel	1480.84	79.9	1182.60	76.4	74.5	72.1
Guest House	745.60	67.3	501.86	62.2	48.4	432
B&B	592.15	69.1	409.23	65.1	60.3	62.6
Self Catering	757.48	69.7	527.89	62.4	68.7	68.1

*December as benchmark month

Analysis of different lodging category performance in each region shows that Cape Town Central's performance as indicated by both average room rates and occupancy rates was generally very high. Lodging performance statistics for Cape Town East and North were overall lower than those for Central and South (refer to Table 9 below).

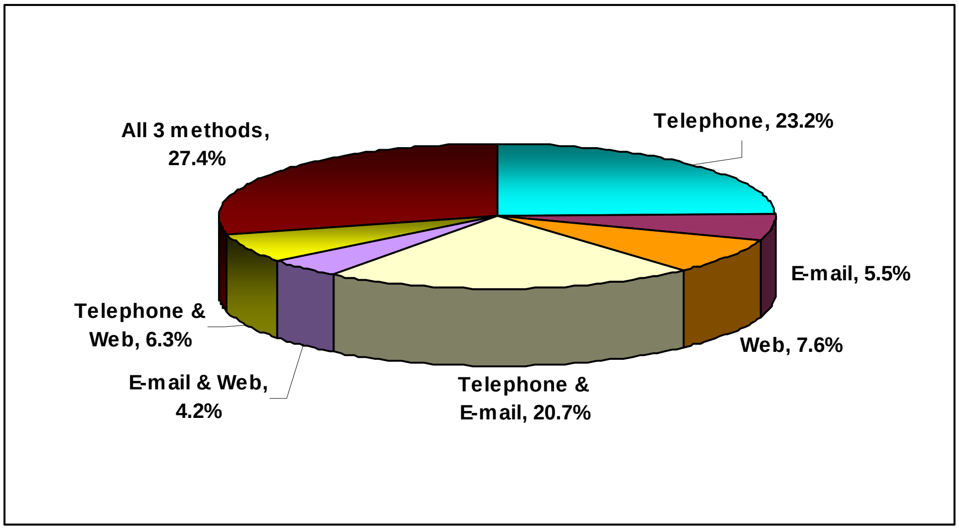
Booking Method

Telephone was the single most common booking method through which the participating establishments received the bulk of their bookings. 27.4% of the establishments received the bulk of their bookings via all three methods while 20.7% received their bookings through both telephone and e-mail (refer to Figure 29).

Table 9: Lodging statistics by Cape Town region and category of establishment

Category/ Region	Cape Town Central		Cape Town East		Cape Town South		Cape Town North	
	Ave. Room Rate (R)	%Occu-pancy	Ave. Room Rate (R)	%Occu-pancy	Ave. Room Rate (R)	%Occu-pancy	Ave. Room Rate (R)	%Occu-pancy
Hotel	2298.79	89.4	836.00	77.4	1879.00	75.4	884.62	77.1
Guest House	1091.67	78.9	444.67	67.3	717.50	70.3	547.50	44.7
B&B	1220.57	82.2	373.33	71.7	354.00	48.6	396.25	68.1
Self Catering	1013.57	81.5	681.33	74.3	714.27	48.8	607.92	70.8
All	1400.63	82.9	583.83	72.7	992.28	61.2	610.00	67.2

Figure 29: Method through which bulk of bookings were received



Q4 2007 CAPE OVERBERG REGIONAL TRENDS

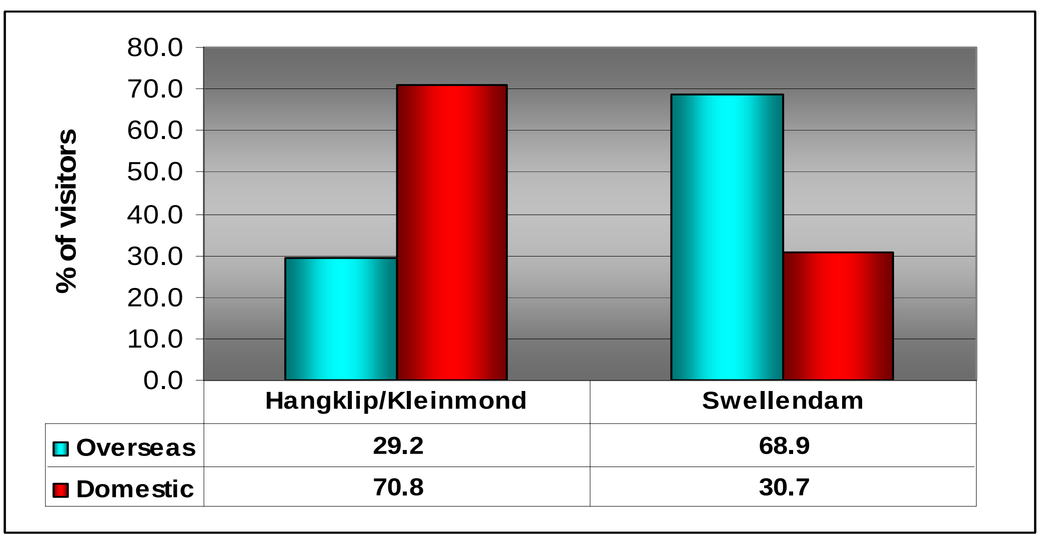
There were a total of 304 responses obtained from the Overberg Region in Q4 2007, distributed across the towns of Hangklip/Kleinmond (8.6%) and Swellendam (91.4%).

Origin of visitors

65.6% of the respondents were overseas and 34% domestic. Among the overseas visitors, the top source countries were the UK (22.6%), Germany (16%), Netherlands (10.1%), Switzerland (3.5%) and 2.8% each for France and Belgium.

70.8% of the respondents from Hangklip/Kleinmond were domestic visitors and 29.2% were from overseas. The overseas visitors were from the UK (12.5%), 8.3% from France, 4.2% from Netherlands and Norway (4.2%). Findings show the complete opposite for the town of Swellendam, with the majority (68.9%) originating from overseas and 30.7% domestic. Of the overseas visitors, most (23.5%) were from the UK, followed by 17.4% from Germany, 10.6% from Netherlands and 3.8% from Switzerland.

Figure 30: Visitor origin region



Of the domestic visitors, the majority (52.2%) were from the Western Cape Province, followed by 36.7% from Gauteng, KwaZulu-Natal and Mpumalanga (refer to Figure 31). The main domestic source provinces for each of the participating towns were the Western Cape, Gauteng, Mpumalanga and Free State.

Figure 31: Domestic visitors' province of origin

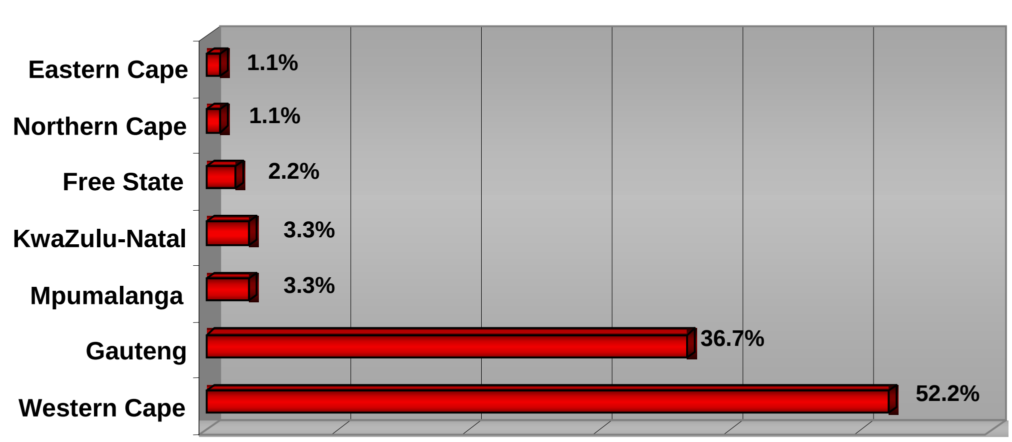
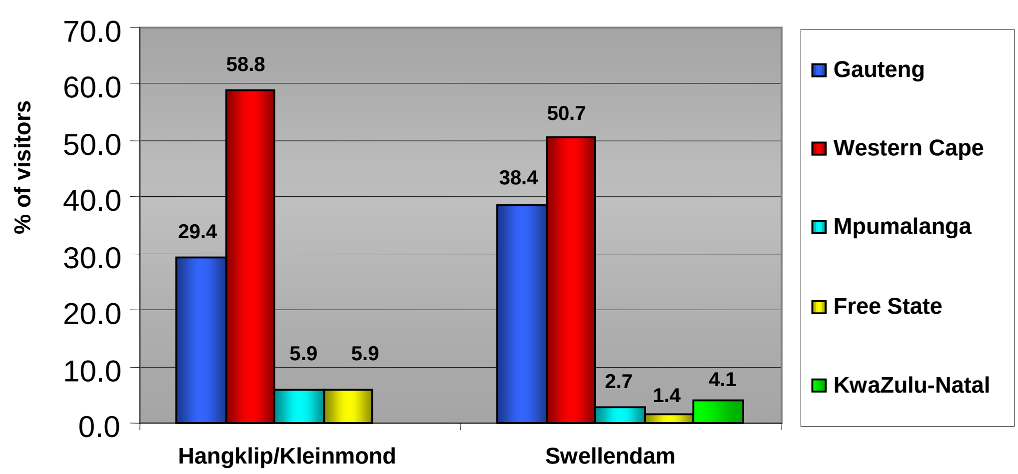


Figure 32: Origin of domestic visitors by participating Overberg Towns



Travel group size and length of stay

The overall average and most common travel group size was two. The majority (68.4%) of visitors travelled in pairs, 11.2% travelled in fours, 9.2% in threes, 5.1% travelled alone, 2% in fives and 2.4% in sixes (refer to Figure 33). Of the overseas visitors, 75.8% travelled in pairs, 11.8% in fours, 5.4% in threes and 2.2% alone. Most (52.2%) domestic visitors travelled in pairs, 16.3% in threes, 12% alone and 10.9% in groups of four.

Figure 33: Travel group size

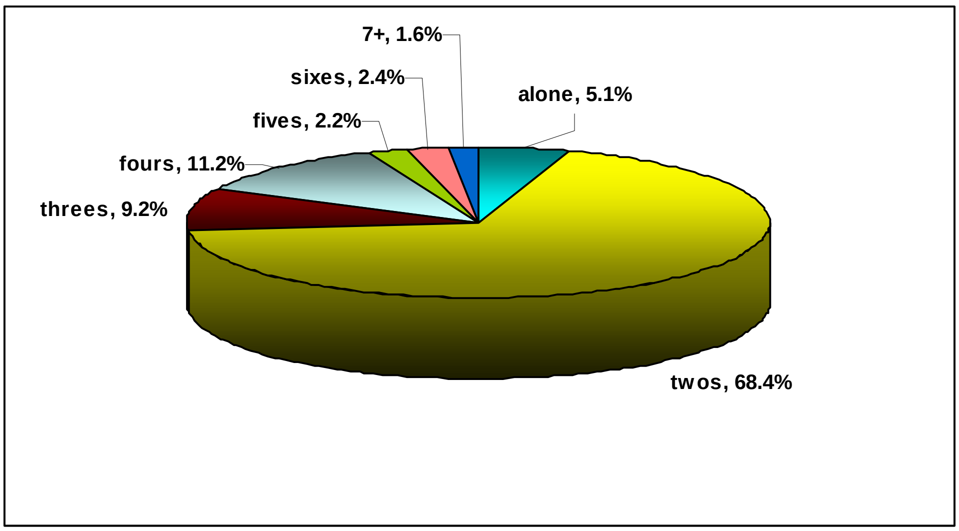
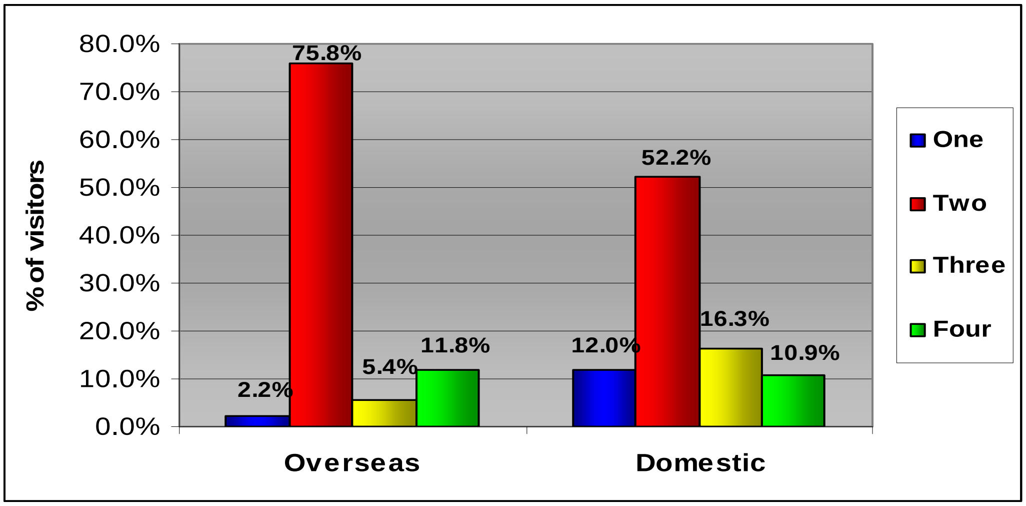
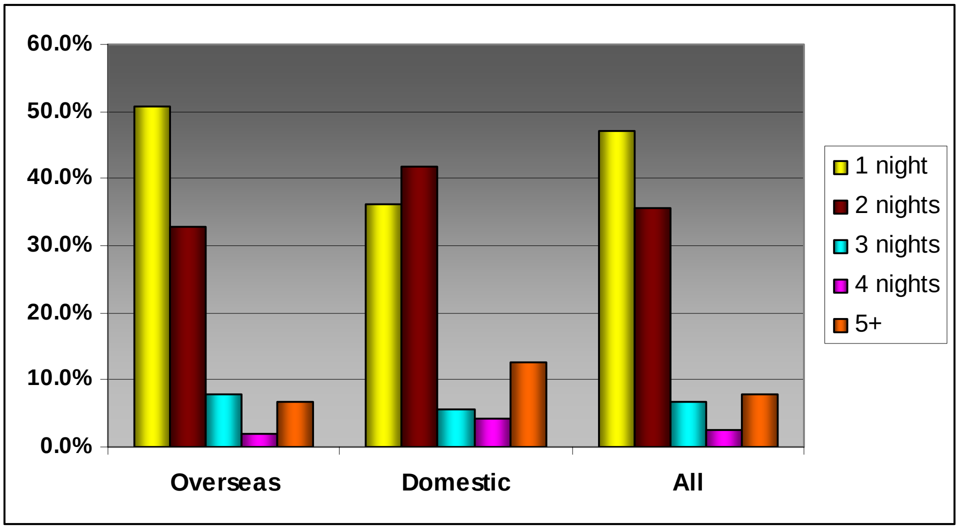


Figure 34: Travel group size by origin region of visitor



The overall average length of stay was two nights, however, the most common length of stay was one night. 77.6% of the visitors stayed overnight and 22.4% were day visitors. 47% stayed for one night, 35.6% for two nights, 6.8% for three nights and 2.5% for four nights. 80.4% of overseas visitors stayed overnight, with the majority (50.7%) staying for one night, 32.9% for two nights, 7.9% for three nights and 2% for four nights. However, the majority (41.7%) of domestic visitors stayed for two nights, followed by 36.1% staying for one night (refer to Figure 35).

Figure 35: Length of Stay by origin



Main purpose of visit & mode of transport

The majority (98.7%) of visitors visited for holiday. Of the overseas visitors, almost all (99.5%) visited for holiday. 97.9% of domestic visitors were in the destination for holiday and 2.1% for business.

88.9% of visitors travelled by car, 8.2% by bike and 2.5% by bus. Of the overseas visitors, 95.1% travelled by car, 3.3% by bus and 1.6% by bycicle. Of the domestic visitors, 73.2% travelled by car, 24.4% by bicycle and 1.2% by bus.

General comments about the Overberg

All the comments for the destination were positive. There were no negative comments on the destination from both overseas and domestic visitors. Visitors to both Hangklip/Kleinmond and Swellendam provided good feedback on the customer service received at the respective tourism offices.

Q4 2007 CAPE GARDEN ROUTE REGIONAL TRENDS

There were a total of 555 responses from the Cape Garden Route region in Q4 2007, from five towns including Uniondale (5.2%), De Rust (3.1%), George (15.9%), Oudtshoorn (53.9%) and Mossel Bay (2%). The responses were distributed across the three Q4 months as follows: October, 15.1%; November, 33.3% and 51.5% in December.

Origin of Visitors

52.7% of the respondents were from overseas, 46.7% domestic and 0.5% from Africa (excluding domestic) (refer to Figure 36). South Africa with 46.7% was the single highest source market followed by Germany (13.9%), UK (12.8%) and the Netherlands (8.4%).

Of the domestic visitors 40.5% were from the Western Cape, 31.7% from Gauteng, 8.8% from the Eastern Cape and smaller percentages from the other provinces (refer to Figure 37).

Figure 36: Origin region of visitors

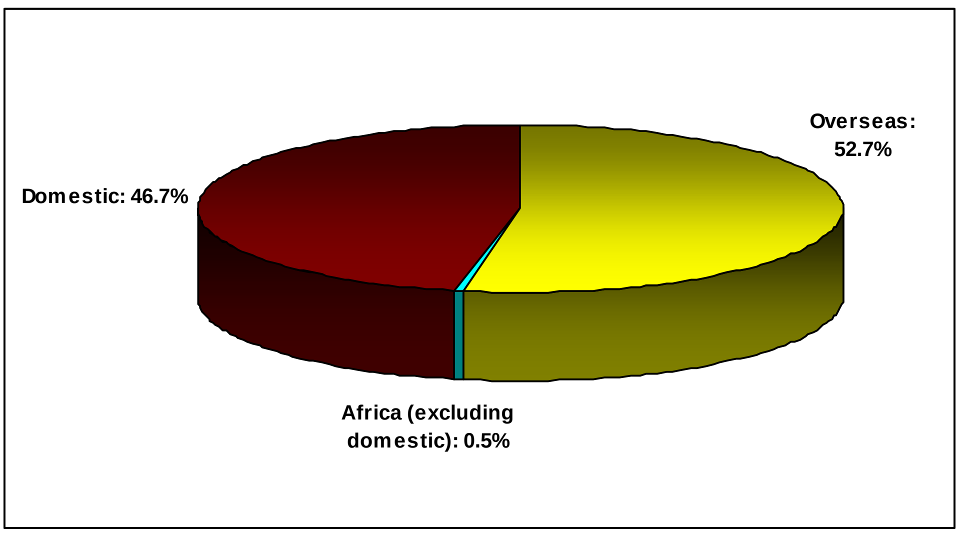
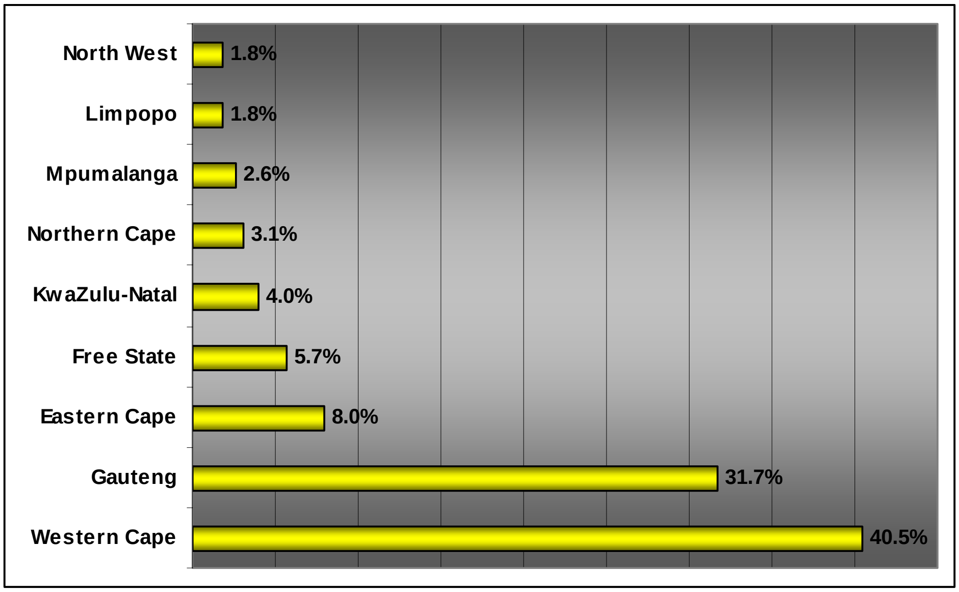
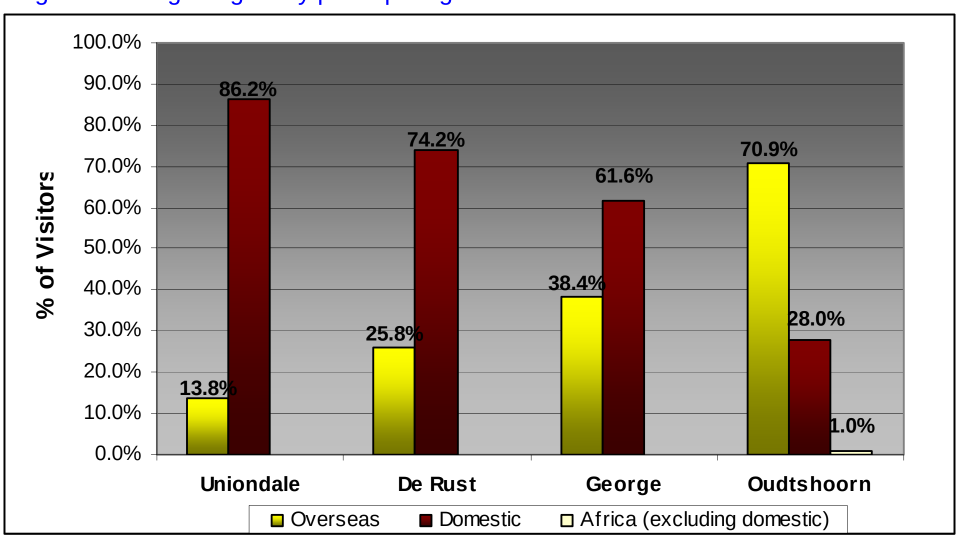


Figure 37: Q4 2007 Domestic visitor province of origin



Analysis of origin by participating location showed that most of the visitors in the participating towns were domestic except for Oudtshoorn that had more overseas than domestic visitors.

Figure 38: Origin region by participating Garden Route town



Travel group size

The overall average travel group size was three and the most common was two. 61.9% of the respondents travelled in twos, 14.8% in fours, 8.7% in threes and 5.5% alone (refer to Figure 39). Average travel group size didn't vary much with origin region of visitor. The average group size for overseas was 2.8 while that for domestics was 2.9. While there wasn't much origin region variation in travel group size there was a substantial proportion of domestic visitors travelling in fives and sixes than there were overseas visitors. However, there was also a substantial proportion (3.1%) of overseas visitors travelling in groups of seven and more probably in arranged tour groups (refer to figure 40). There were not enough African (excluding domestic) visitors to include in comparisons.

Figure 39: Travel group size

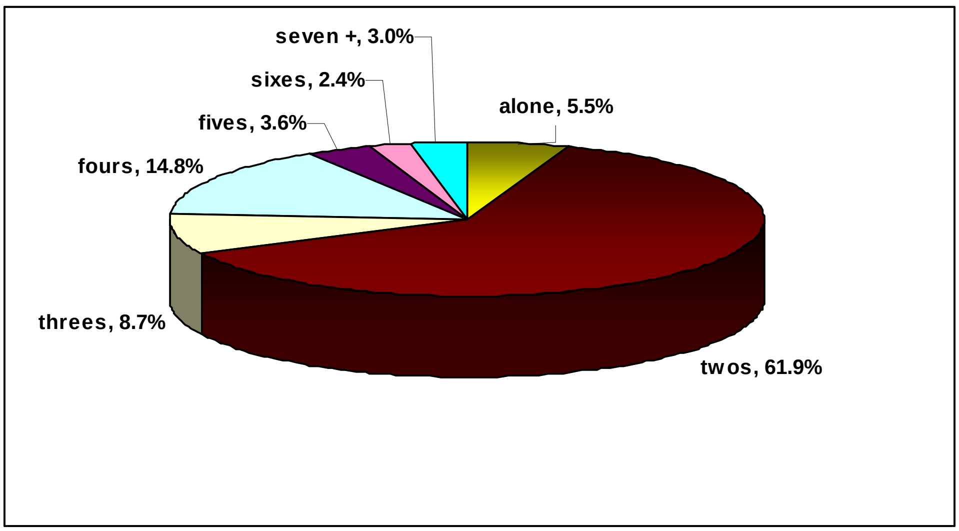
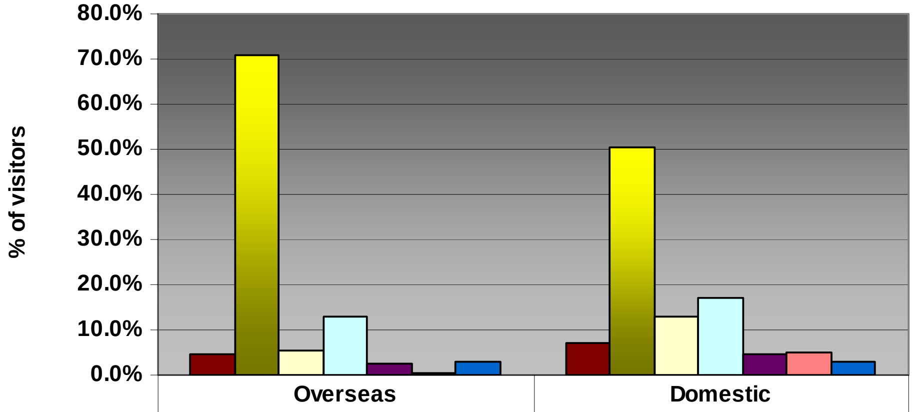


Figure 40: Travel group size by origin region of visitor

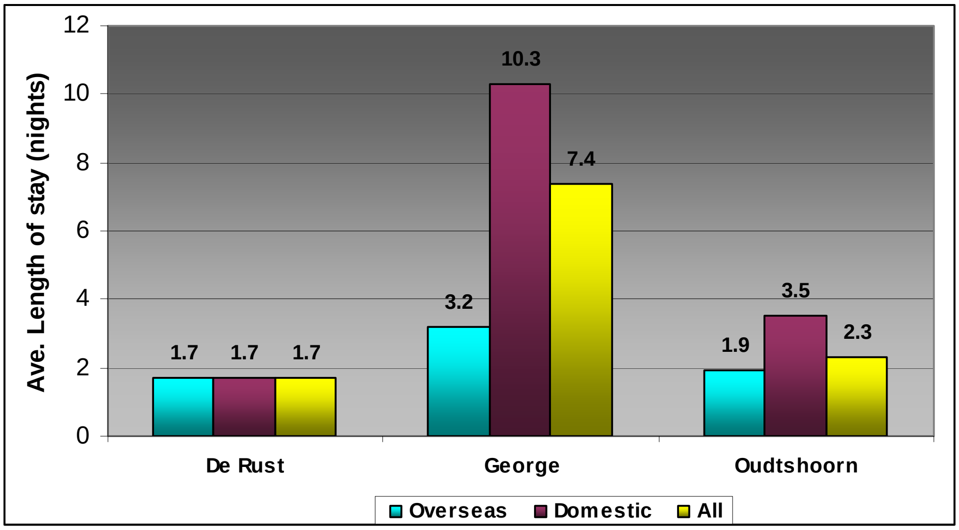


	Overseas	Domestic
alone	4.5%	6.9%
twos	70.9%	50.5%
threes	5.6%	13.0%
fours	13.1%	17.1%
fives	2.6%	4.6%
sixes	0.4%	5.1%
Seven+	3.1%	2.8%

Length of Stay

The overall average length of stay in the participating Cape Garden Route Towns was 2.5 nights but the most common was one night. Average length of stay for overseas visitors was two nights and that for domestic visitors was 3.4 nights. 54.9% stayed for one night and 25.7% for two nights. However, average length of stay varied with town and origin region of visitor (Figure 41). George had the highest overall average length of stay of seven nights, 10 nights for domestic visitors and 3.2 nights for overseas visitors. Overall average length of stay for the whole trip was 16.3 nights, 24 nights for overseas visitors and 11 nights for domestic visitors. This finding shows that overseas visitors spend about a sixth of their entire trip time in the Cape Garden Route towns suggesting that they visit multiple destinations in one trip.

Figure 41: Average length of stay by origin region and participating town.



Mode of transport and purpose of visit

Almost all (95.7%) of the visitors used car as their mode of transport in the destination followed by bus (3.3%). 97% of the visitors were in the destination on holiday and 2.1% on business. The pattern didn't vary much with origin of visitor.

Q4 2007 CAPE KAROO REGIONAL TRENDS

There were only 28 responses received from the Cape Karoo region in Q4 2007 from the Laingsburg visitor information centre. Because of the low response rate, not much analysis could be done for the region in this quarter. Only a few general descriptives are, therefore, presented below.

Origin of Visitor

92.9% (26 of the 28) of the visitors were domestic. The domestic visitors were from the Western Cape (75%), Gauteng (20%) and 5% from the Free State as seen in the figure 42 below.

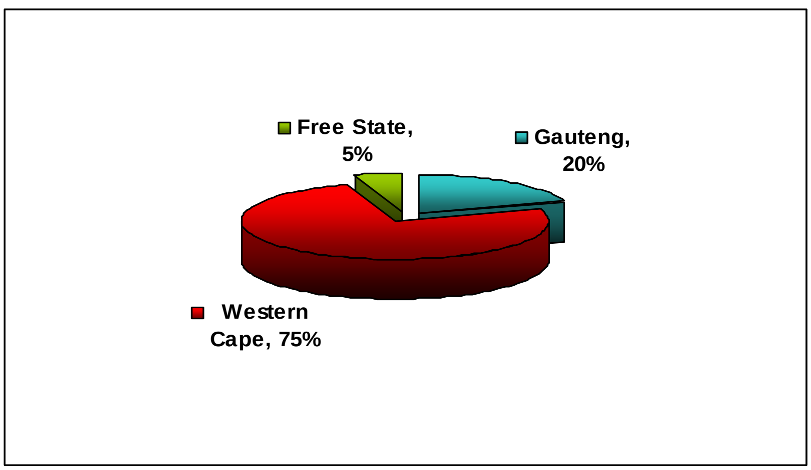
Group size, length of stay and purpose of visit

Most visitors (35.7%) of the respondents travelled in pairs, followed by groups of four (25%). The average group size was three. 89.3% of the respondents indicated that their main purpose of visit was holiday.

General comments

All the comments were positive and the visitors only had good things to say about their experience in Cape Karoo. 42.9% indicated that the people are very friendly and helpful and 33.3% indicated that the destination was excellent and that they had a wonderful experience in the destination.

Figure 42: Q4 2007 Domestic visitor's province of origin



Q4 2007 CAPE WINELANDS REGIONAL TRENDS

There were a total of 1,006 responses from the Winelands region in Q4 2007. These were from Robertson (11.3%), Tulbagh (52.4%), Ceres (27.3%) and Montagu (8.9%). The responses were distributed across the three Q4 months as follows: October, 19.9% November, 21.2% and 58.9% in December.

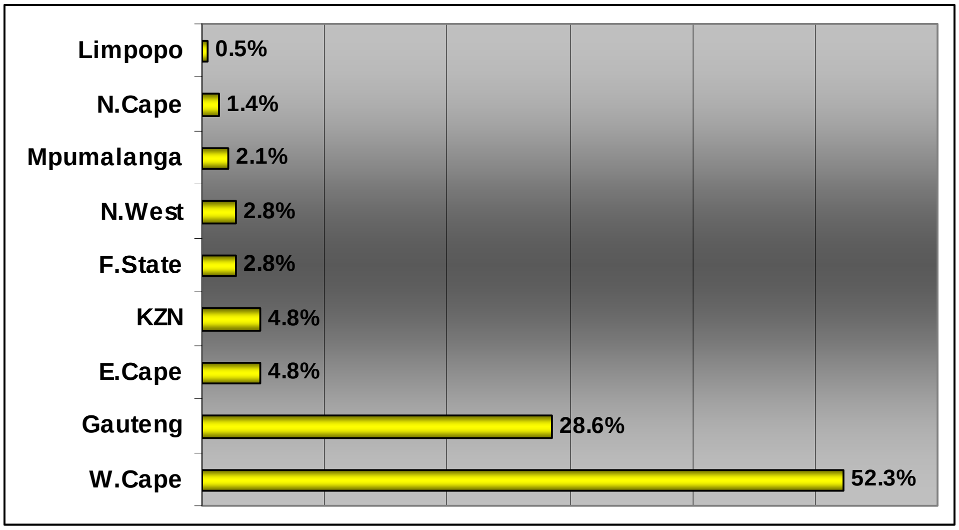
Origin of visitors

50.8% of the visitors were from overseas, 0.9% from Africa and 48.6% domestic. South Africa with 48.6% was the single largest source of visitors followed by Germany (16.2%), UK (11.8%) and Netherlands (7.1%). The composition of visitors in each participating town varied slightly but the major source markets pretty much dominated across all towns (refer to Table 10).

Table 10: Top three source countries in each participating Cape Winelands town

Rank/Town	Robertson	Tulbagh	Ceres	Montagu
1	South Africa, UK, Germany (18.9% each)	South Africa (47.2%)	South Africa (63%)	South Africa (49.4%)
2	Netherlands (8.1%)	Germany (18.1%)	Germany (11.9%)	Germany (14.9%)
3	USA (7.2%)	UK (14.1%)	UK (6.7%)	UK & Netherlands (5.7% each)

Figure 43: Domestic visitors province of origin



Of the domestic visitors 52.3% were from the Western Cape, 28% from Gauteng and a few from the other provinces (Figure 43). Western Cape and Gauteng dominated as the major sources of domestic visitors in all the participating Cape Winelands towns (Table 11).

Table 11: Top four domestic visitors' province of origin by participating Cape Winelands town

Rank /Town	Robertson	Tulbagh	Ceres	Montagu
1	W. Cape (68.4%)	W. Cape (53.2%)	W. Cape (50.6%)	W. Cape (45.9%)
2	E. Cape & F. State (10.5% each)	Gauteng (28.2%)	Gauteng (31.5%)	Gauteng (29.7%)
3	Gauteng (5.3%)	KZN (5.1%)	KZN (6.2%)	E. Cape (10.8%)
4	N. West (5%)	E. Cape (3.7%)	E. Cape (4.3%)	F. State (8.1%)

Travel group size

The average travel group size was three, but the most common group size was two. 58.5% of the visitors travelled in pairs, 14.2% in fours and 9.7% in threes (Figure 44). 70.4% of overseas visitors travelled in pairs, 9.6% in fours and 6.7% in threes. 46.2% of domestic visitors travelled in pairs, 19.2% in fours and 12.8% in threes (refer to Figure 45).

Figure 44: Travel group size

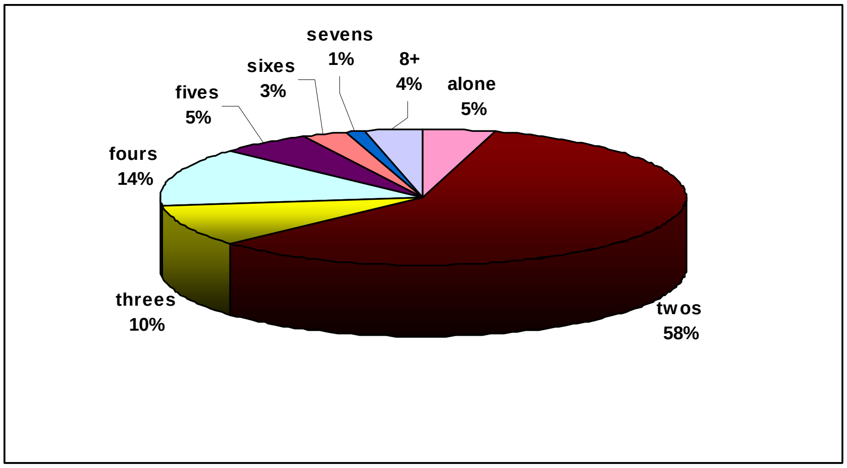
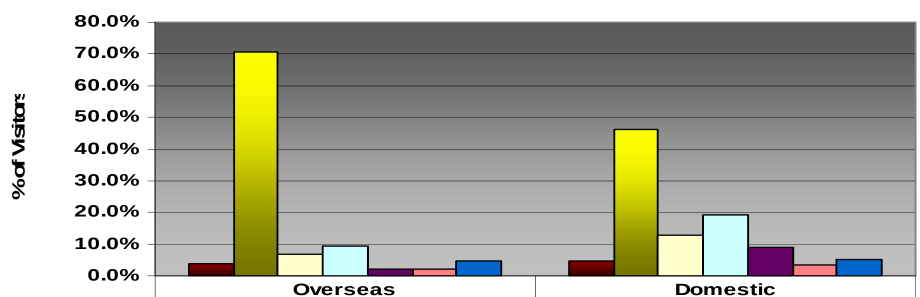


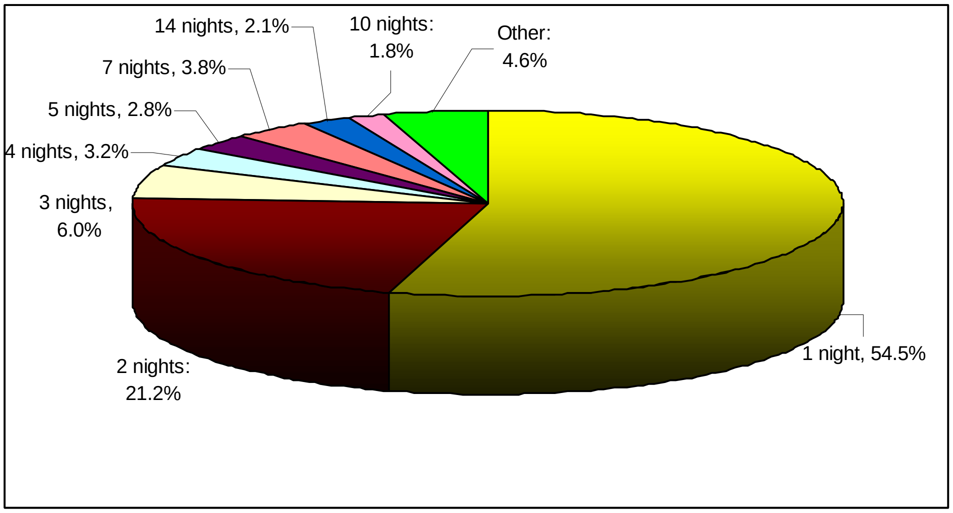
Figure 45: Travel group size by origin region



	Overseas	Domestic
alone	3.9%	4.7%
twos	70.4%	46.2%
threes	6.7%	12.8%
fours	9.5%	19.2%
fives	2.2%	8.8%
sixes	2.2%	3.4%
7+	4.8%	5.0%

Length of stay

Figure 46: Most common length of stay



The overall average length of stay of visitors in the participating Winelands towns was three nights but the most common length of stay was one night. Average length of stay for overseas visitors was two nights and that for domestic visitors was three. 54.5% of the visitors stayed for one night, 21.2% for two nights, 6% for three nights and the rest for four nights and longer (Figure 46).

Comparing average length of stay among the participating Cape Winelands region towns showed that Montagu enjoyed the highest (4.5 nights) length of stay followed by Ceres. However, Ceres enjoyed the highest (5.6 nights) length of stay from overseas visitors while Montagu enjoyed the highest length of stay from domestic visitors (refer to Table 12).

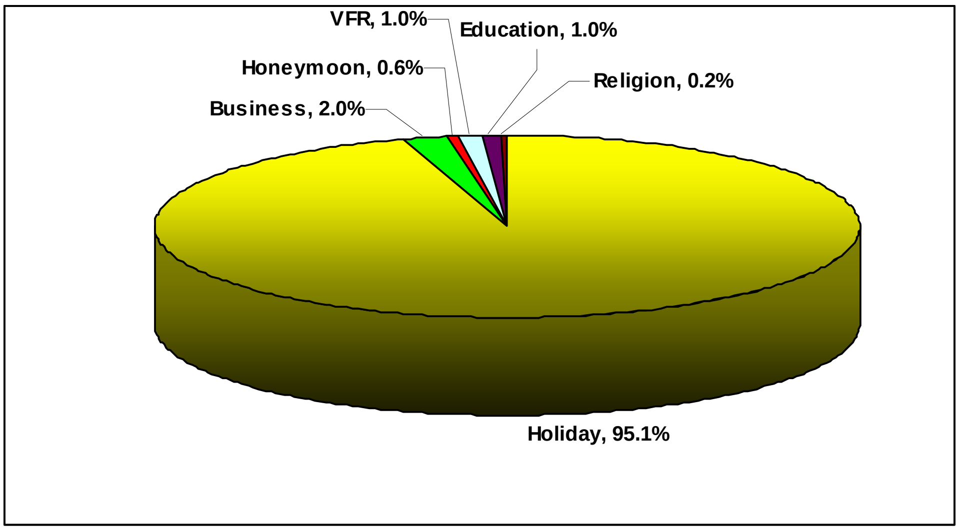
Table 12: Average length of stay by participating Cape Winelands town and region of origin

Participating Cape Winelands town	Average length of stay (nights)		
	Overseas	Domestic	All
Robertson	3.9	2.6	3.6
Tulbagh	2.9	2	2.4
Ceres	5.6	3.1	4.2
Montagu	3	5.6	4.5
All	**3.6**	**2.9**	**3.3**

Main purpose of visit and mode of transport

The most common purpose of visit among almost all (95.1%) of the respondents was holiday followed by business (2%). A few were in the destination visiting friends and relatives (1%) and for educational purposes (1%) (Figure 47). The main mode of transport was car (98.4%) and only 0.1% made use of public transportation.

Figure 47: Main purpose of visit to the Winelands



Destination Brand Awareness: Domestic Market Study 2007

A brand awareness study was conducted in June 2007 across South Africa to assess the level of awareness of brand Cape Town & Western Cape along with the destination's sub-brands. A probability sample of 2,464 was selected from the population 16 and over across South Africa. Data collection was conducted by AC Nielsen through face-to-face questionnaire administration. 50.1% of respondents were male, and 49.9% were female. 52.6% were Black, 25.7% were White 11.9% were Coloured, and 9.7% were Indian.

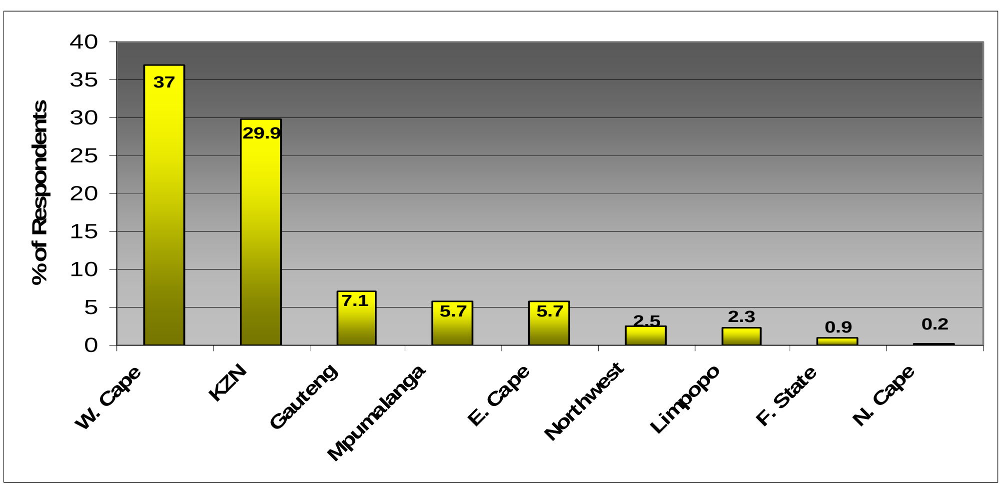
Top of Mind (TOM) Destination Awareness

Respondents were asked to name any destination that immediately comes to mind when thinking of taking a pleasure trip in South Africa. Several destinations were mentioned, but the top five top of mind (TOM) domestic destinations were:

- Cape Town (28.5%)
- Durban (24%)
- Johannesburg (5.2%)
- Mpumalanga (4.9%)
- Port Elizabeth (2.4%).

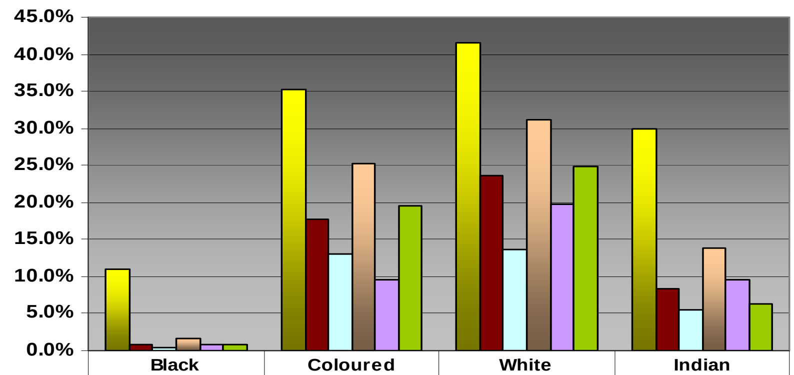
Analysis of the top of mind destinations by province showed that Western Cape destinations were at the top followed by KwaZulu-Natal (Figure 48). This implies that Western Cape's destinations come to mind when people are thinking of taking a domestic pleasure trip more often than do destinations in other provinces.

Figure 48: TOM Destination awareness by province



Cape Town was the most visited region by all races and the Overberg the least visited

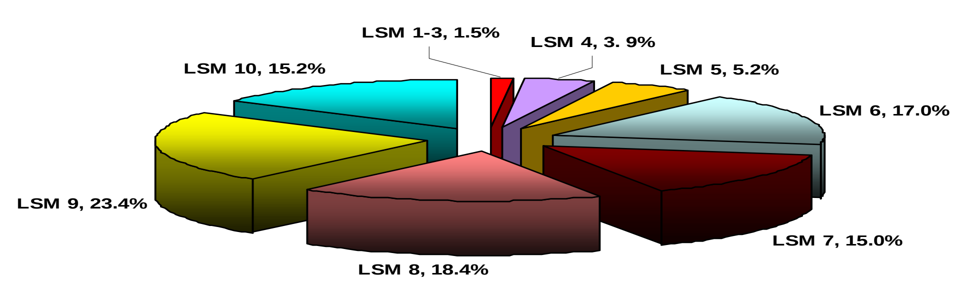
Figure 49: "Have visited the regions" by race



	Black	Coloured	White	Indian
Cape Town	11.0%	35.2%	41.6%	30.0%
Cape Winelands	0.8%	17.7%	23.7%	8.3%
Cape Overberg	0.4%	13.0%	13.7%	5.4%
Cape Garden Route & Klein Karoo	1.7%	25.3%	31.2%	13.8%
Cape Karoo	0.9%	9.6%	19.7%	9.6%
Cape West Coast	0.8%	19.5%	24.9%	6.3%

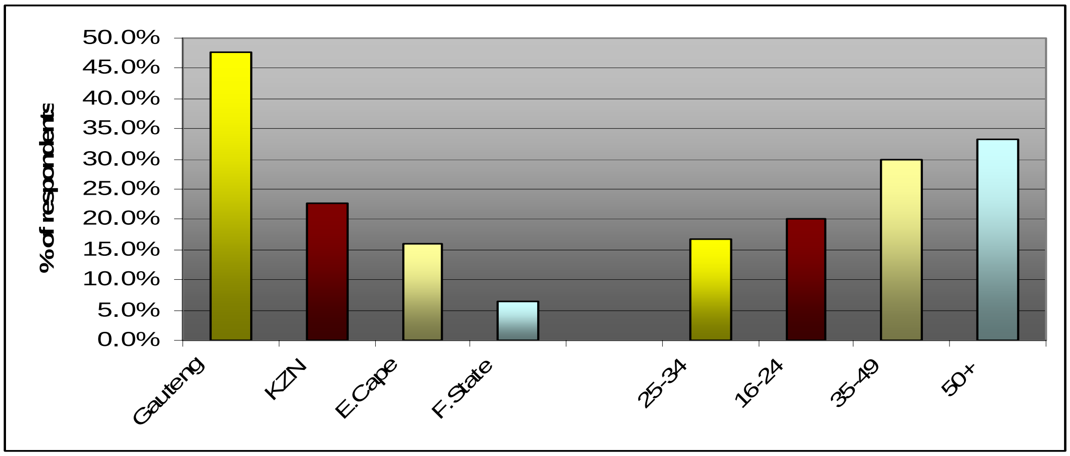
Visitation by Living Standard Measure (LSM)

Figure 50: "Have visited the destination" by Living Standard Measurement (LSM)



LSM 9 and 10 accounted for 28.6% of those who indicated that they had visited Cape Town & the Western Cape. LSM 1-5 accounted for only 10.6%. Most of those who had visited were from Gauteng followed by KwaZulu-Natal, Eastern Cape and Free State. Over 60% of those that had visited the province were 35 years old and over (Figure 51). Findings of this study, therefore, show that visitors to the province are likely to be: white and secondly coloured; come from Gauteng, KwaZulu-Natal and Eastern Cape; 35 years and over and belong to LSM 6 and above.

Figure 51: "Have visited the destination" by residence province and age



Brand Recognition

Respondents were presented with the different Cape Town & Western destination brand logos and asked if they recognised any of them and what they thought the brand logos meant or represented. The most recognised destination brand logo was that for Cape Town, followed by Cape Town & Western Cape, Cape Garden Route & Klein Karoo and others (refer to Table 13). 33.4% of the respondents did not recognise any of the destination brands.

Table 13: Destination Brand recognition

Brand logo	% of respondents recognising the brand logo
CAPE TOWN	56.7%
CAPE TOWN & Western Cape	34%
CAPE GARDEN ROUTE & KLEIN KAROO	26.7%
CAPE WINELANDS	23.7%
CAPE WEST COAST	23%
CAPE KAROO	22.2%
CAPE OVERBERG	14.4%

Figure 52: What brand Cape Town & Western Cape represents to the domestic market

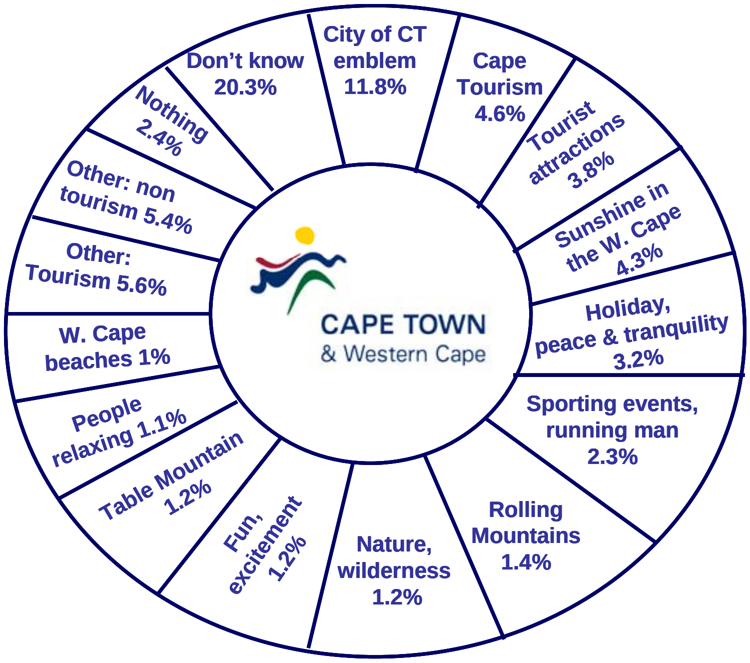


Figure 53: What Cape Town Routes Unlimited represents to the domestic market

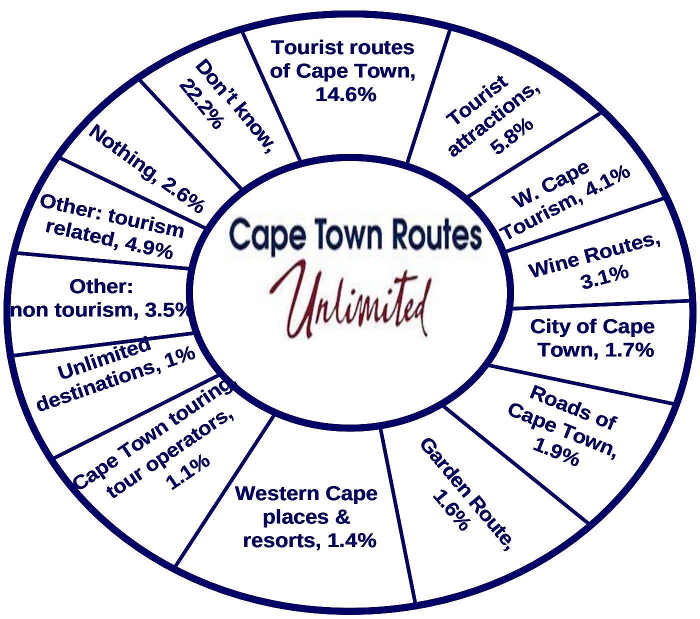


Figure 54: CTT-What the brand represents to the domestic market

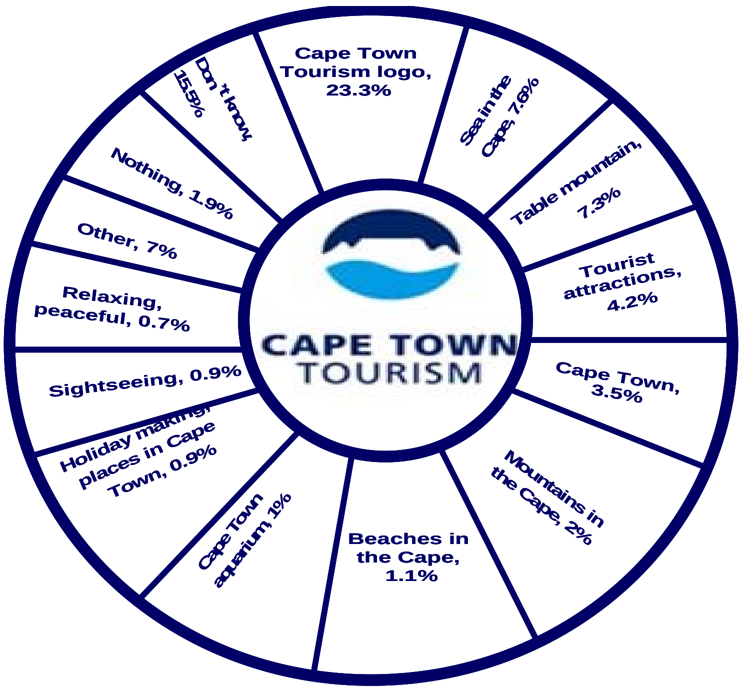


Figure 55: This city works for you-What the brand represents to the domestic market

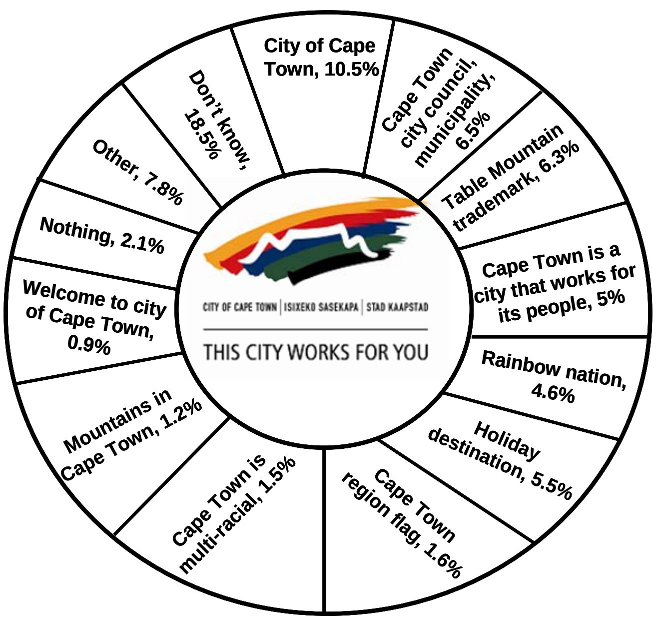
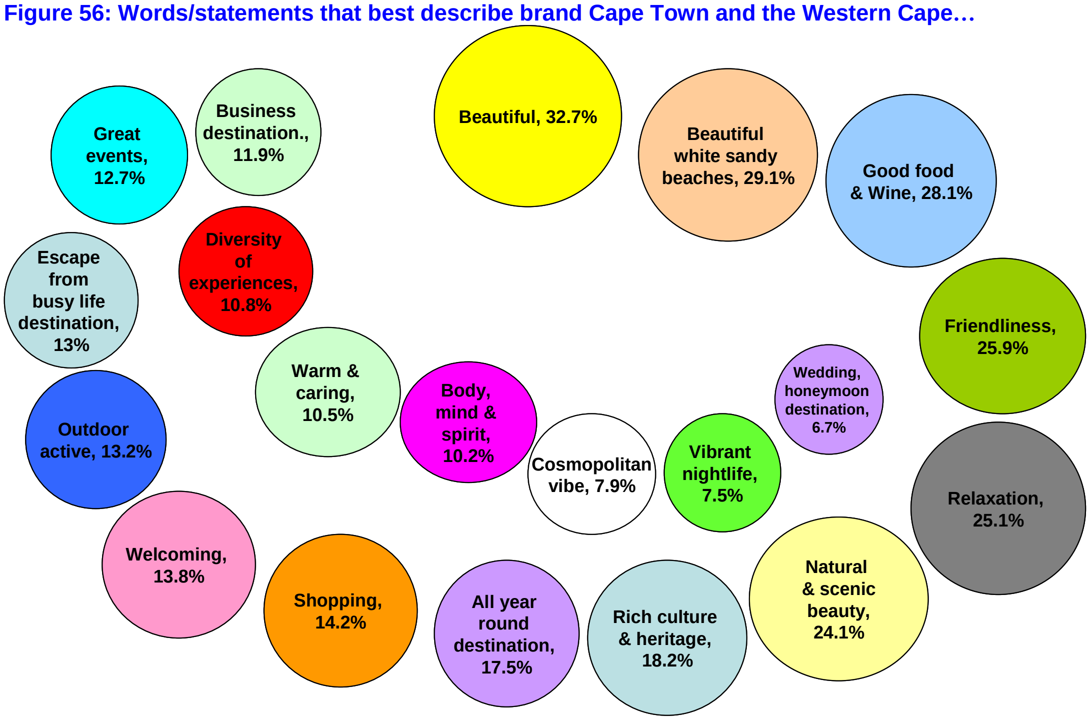


Figure 56: Words/statements that best describe brand Cape Town and the Western Cape…



Respondents were asked to state five statements that, in their view, best described brand Cape Town & Western Cape. Figure 56 above shows in descending order how the brand is viewed in the domestic market. Figure 57 shows how the brand is perceived by those who have visited and those who have not visited the province. Those who have visited mostly describe brand Cape Town and the Western Cape as a "Good food and wine," destination while those who have not visited mostly perceive the destination as just "beautiful" and "relaxing". Bordered in green are the destination brand strengths.

Figure 57: What brand Cape Town & Western Cape represents by whether or not one has visited the destination

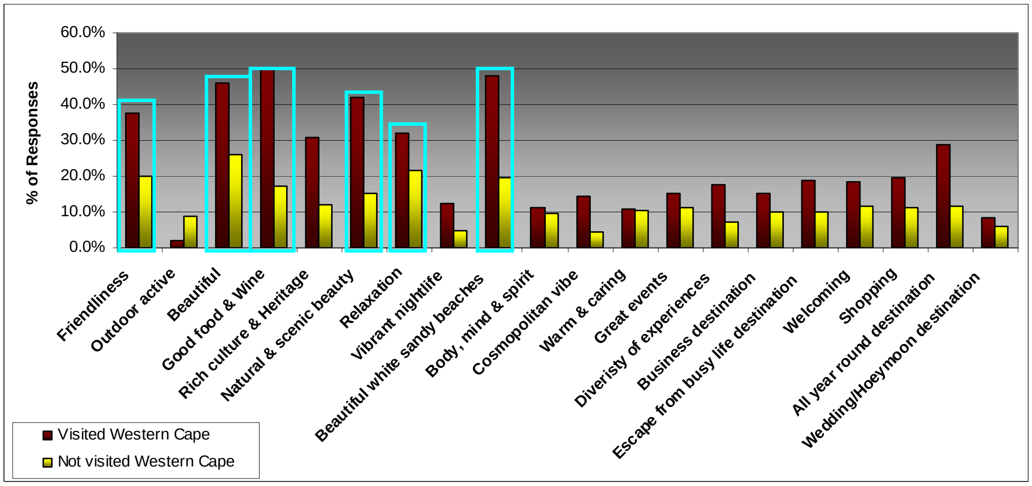


Figure 58 below shows what brand Cape Town and Western Cape represents in the three major domestic source markets for Western Cape including Gauteng, KZN and Eastern Cape. “Just beautiful” is how the domestic market mostly views brand Cape Town & Western Cape regardless of source province. ‘Friendly’ and ‘relaxing’ also rank top among those from KwaZulu-Natal. To those from Gauteng the brand represents “beautiful sandy beaches,” “good food & wine” and also “relaxation.” Bordered in red are the current Cape Town & Western Cape marketing themes.

Figure 58: What brand ‘Cape Town & Western Cape’ represents by domestic source market