



Weskus Regional Trends

WESGRO
cape town & western cape
research

January-June 2021

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1. Methodology

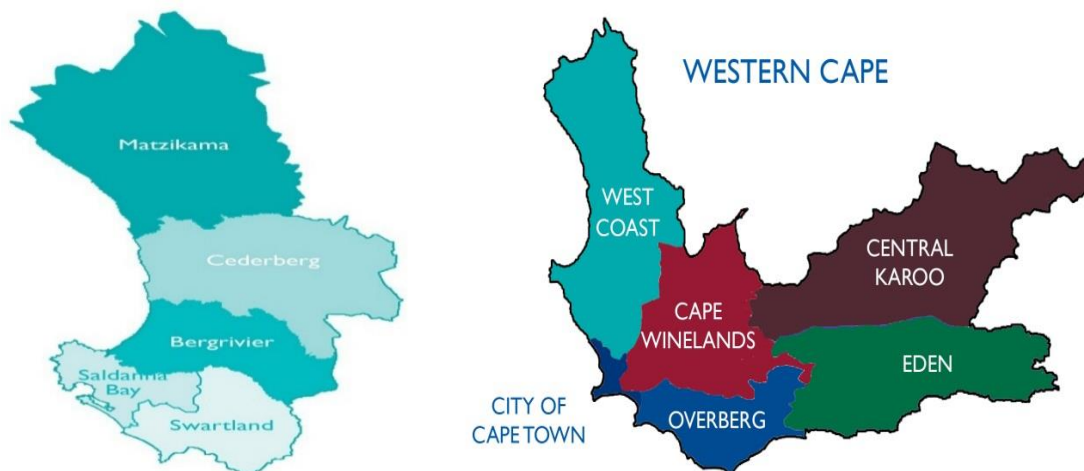
This report provides an overview of the tourism trends and patterns in the Weskus region. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey.

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.

Definition: Tourist: refers to any visitor travelling to a place other than that of his/her own environment for more than one night, but less than 12 months and for whom the main purpose of the trip is other than the exercise of an activity remunerated for from within the place visited.

2. Participation and sample size

Between January and June 2021, a total of **826** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Weskus.



Town	Number of Surveys (Jan-Jun 2021)
Malmesbury	219
Vredenburg	127
vredendal	96
Piketberg	79
Lamberts Bay	62
Velddrif	53
Yzerfontein	49
Porterville	35
Riebeeck Valley	34
Mooreesburg	30
Goedverwacht	23
Vanrhynsdorp	19
Grand Total	826

3. Executive Summary

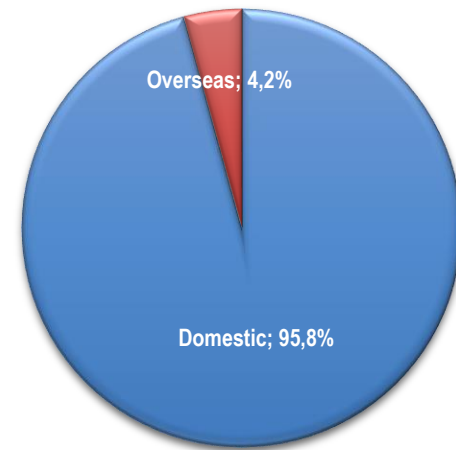
- The COVID-19 pandemic has undoubtedly had a devastating impact on the tourism economy and severely impacted travel from abroad. However, since the reopening of tourism activity, economic recovery is looking promising as tourists gain more confidence in travelling.
- The period highlighted in this report (Jan-Jun 2021) clearly indicates that the largest proportion of travellers to the Weskus originated from the Western Cape (83,1%), this is largely due to many international flights that have not resumed travel to Cape Town as yet.
- The attractions highlighted in this report includes the renowned West Coast National Park, !Khwa ttu and the Old Jail in Vanrhynsdorp. When reflecting back on the first six months of 2021, these attractions collectively welcomed a total of 74,073 visitors between January and June. Although an accurate year-on-year comparison could not be conducted due to the respective closure periods in 2020, the attractions have portrayed strong resilience and recovered very well when compared to 2019 visitor levels.
- The West Coast National Park; a popular icon enjoyed by both nature and flower enthusiasts bursts into colour during the annual flower season (end Jul to start of September). In spite of the significant impact of COVID-19, the park welcomed 67,684 visitors between January and June 2021 and recorded a year-on-year growth of 5% when compared to the same period in 2020 (64,695).
- The Park's recovery into the first six months of 2021 has been progressing very well, reflecting over 50% recovery in visitor levels across each month when compared to 2019 (with the exception of January; 33.7% recovery).
- The Old Jail welcomed 1,314 visitors between January and June 2021. The months February and April performed very well and already recovered to 86,0% and 91,6% of their 2019 visitor levels (respectively).
- !Khwa ttu welcomed slightly over 5,000 visitors between January and June 2021 and has seen a remarkable recovery in visitor numbers during April and May 2021, reaching recovery levels of 85,8% and 95,9% in comparison to 2019.
- In 2021 Wesgro attained the Tourism Sentiment Index (TSI) data package which provides a **Tourism Sentiment Score®** for Cape Town and the Western Cape. One of the Western Cape towns included in the sentiment score is Paternoster.
- The Tourism Sentiment score for Paternoster is considered average at 27, compared to the rest of the world. Around 30% of online conversations were actively recommending or speaking positively about the destination.
- Over the period January to June 2021, the Tourism Sentiment in Paternoster was driven by positive conversations around beaches and architecture, while the negative sentiments revolved around surfing and fishing.
- The top three sentiment categories that emerged for Paternoster was culture/history, outdoor activities and relaxation/wellness. Conversations around all sentiment categories were positive, apart from safety which revealed no emotional tone. "Relaxation/wellness" was the category that achieved the highest score at 52.

4. Weskus Visitor Trends & Patterns

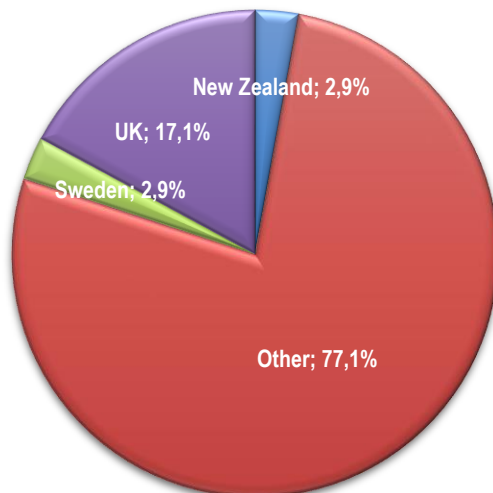
4.1 Origin of Visitors

- The domestic market accounted for the largest (95,8%) share of visitors to the Weskus between January and June 2021 while the overseas market made up 4,2% over the same period.
- In spite of the strict outbound travel regulations, particularly from Europe, a share of 17,1% of overseas travellers originated from the United Kingdom. Additional markets to the region included Sweden (2,9%) and New Zealand (2,9%). However, the dominant share (77,1%) of the overseas market did not indicate their country of origin.
- Visitor trends further showed that the domestic market continued to travel once COVID-19 restrictions had eased.
- The largest share of domestic travellers to the region originated from within the Western Cape (83,1%), confirming that the Weskus is a popular destination among locals. Gauteng, Northern Cape and Mpumalanga followed as the other leading source provinces to the region.

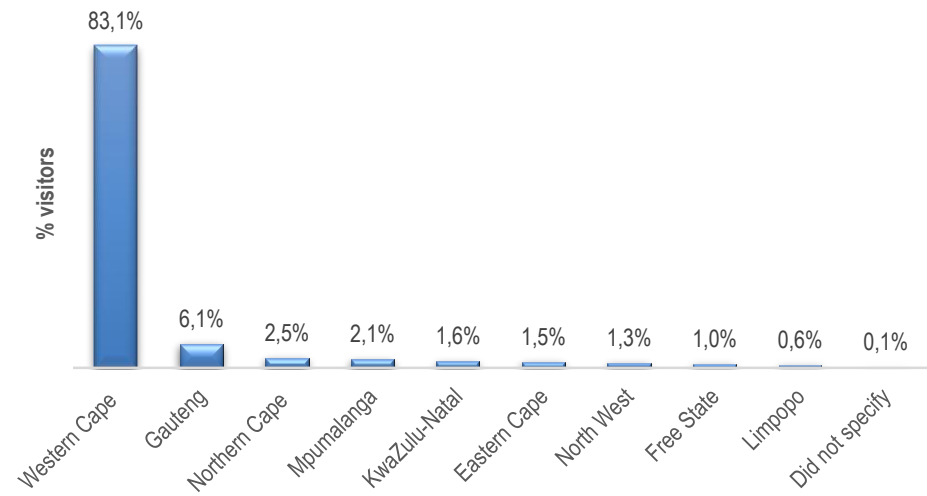
% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE WESKUS, JAN-JUN 2021



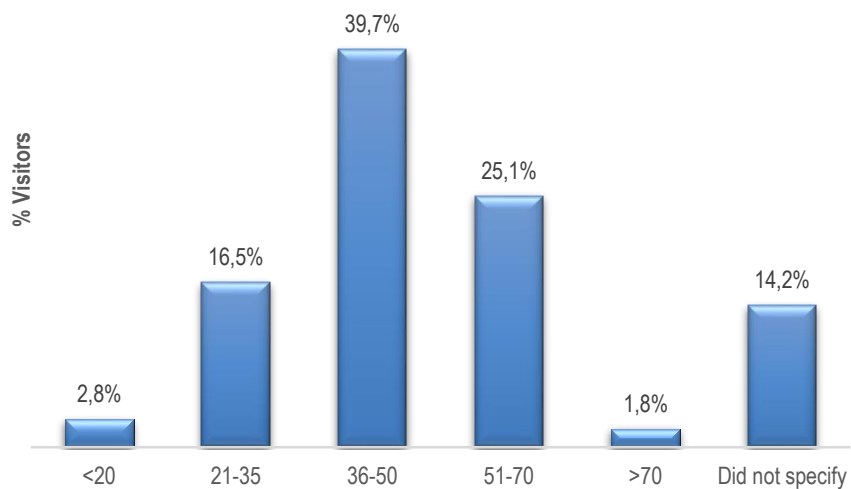
% SHARE INTERNATIONAL VISITORS TO THE WESKUS, JAN-JUN 2021



% SHARE DOMESTIC VISITORS TO THE WESKUS, JAN-JUN 2021

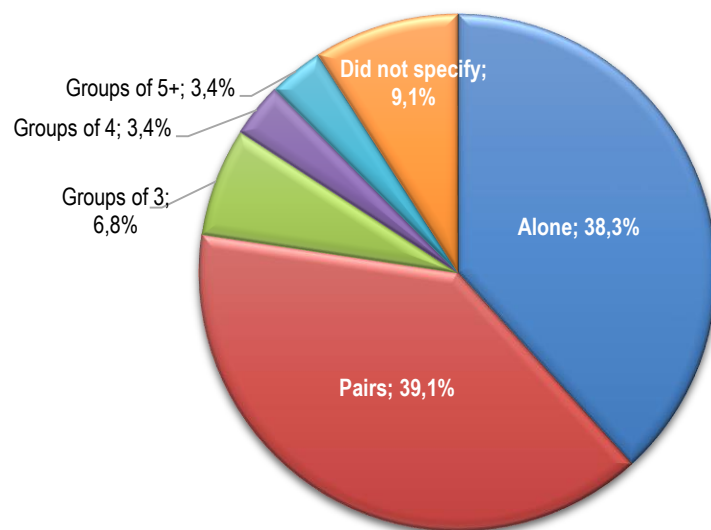


4.2 Age profile of visitors

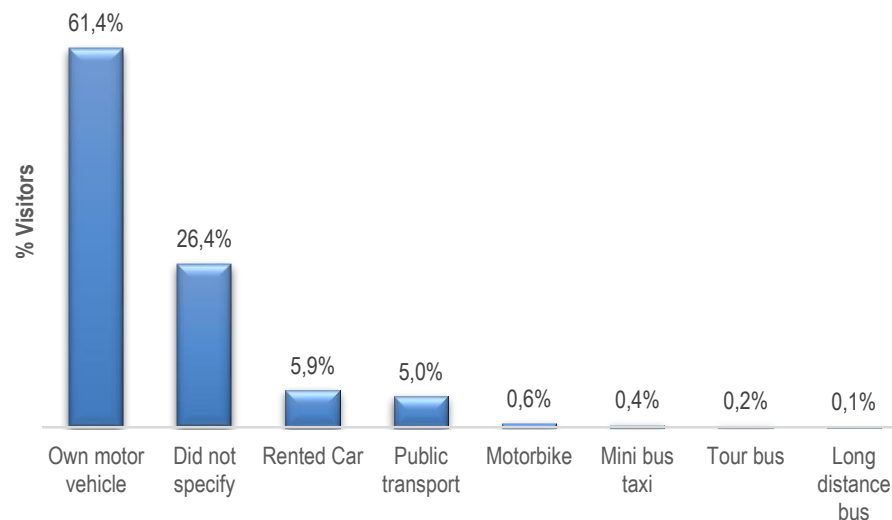


- The age groups 36-50 and 51-70 years ranked as the most popular amongst visitors to the Weskus.
- Own motor vehicles were the preferred mode of transport over the period, this is largely due to the dominant share of locals (83,1%) to the region.
- The largest proportion of respondents travelled to the region in pairs or on their own, followed by 6,8% who travelled in groups of three.

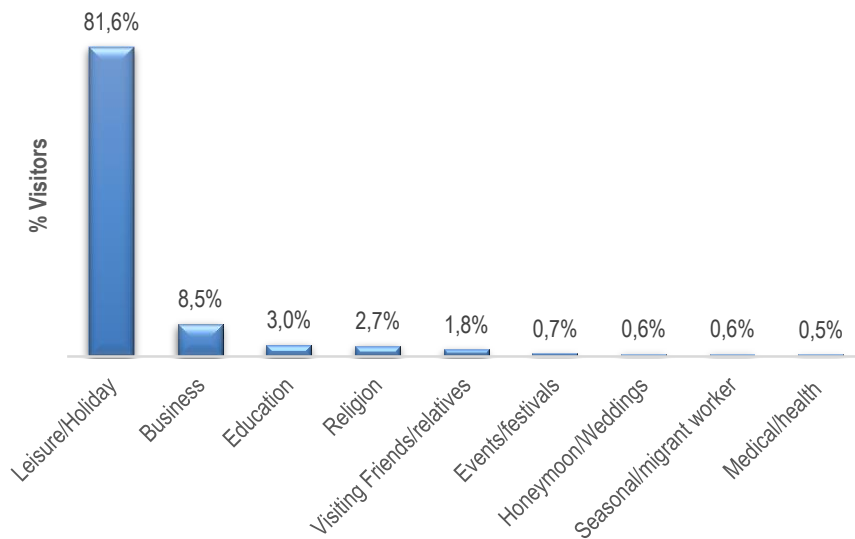
4.3 Group size



4.4 Mode of transport



4.5 Purpose of visit

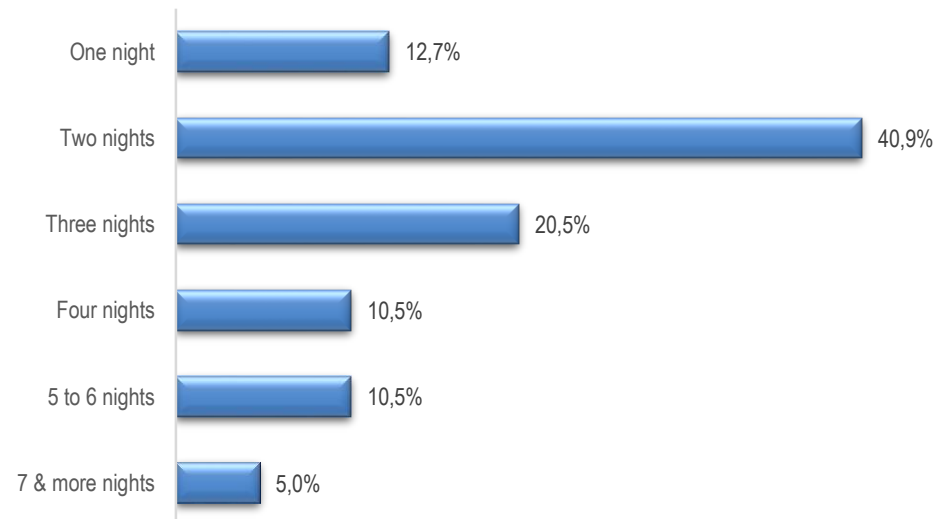


- Over 80% of visitors travelled to the Weskus for holiday and close to 9% for business. While visitor movement was dominated by the domestic market, trends indicated that the overseas market specifically travelled to the region for leisure or for medical/health/wellness purposes.
- 73,4% of visitors took day trips to the Weskus and overnight stays accounted for 26,6%. Of those who indicated overnight stays, one, two and three nights were amongst the most popular across the period.

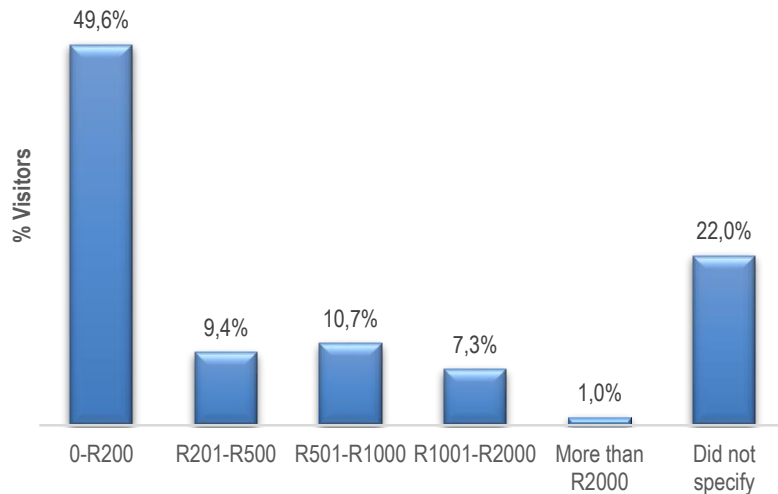
4.6 Overnight stay



4.7 Average Length of Stay

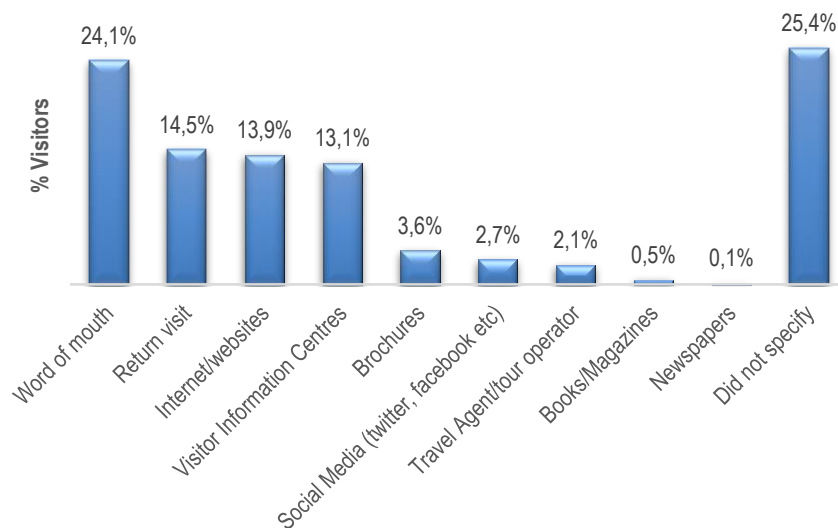


4.8 Average Daily Spend

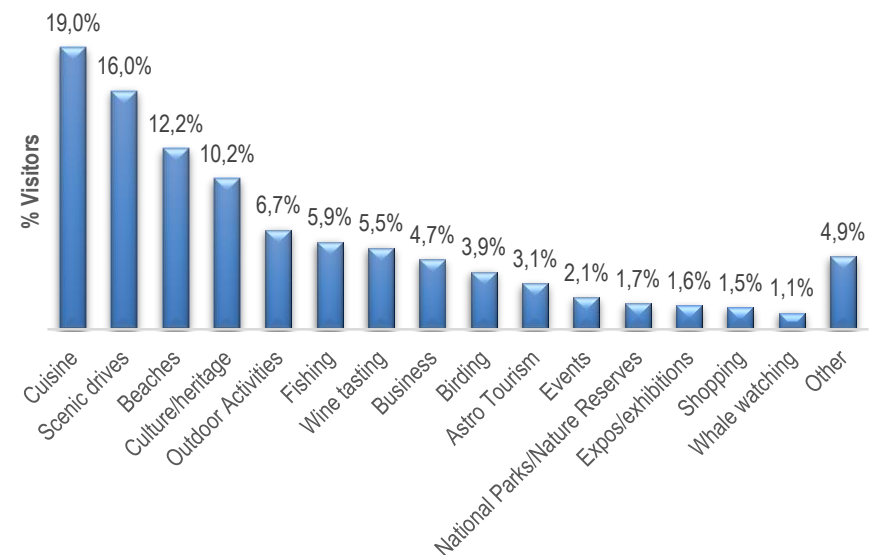


- Close to 50% of visitors to the Weskus spent between 0-R200 per day in the region, followed by 10,7% who indicated an average expenditure of R501-R1000.
- Word of mouth ranked as the top information source utilised across the period and 14,5% were return visitors to the region.
- The internet/websites also continued to be a strong tool for obtaining information, ranking as the 3rd most popular source.
- Cuisine ranked as the top tourism activity enjoyed in the region, followed by scenic drives, beaches, culture/heritage and outdoor activities.

4.9 Top information sources



4.10 Main Activities undertaken in the Weskus



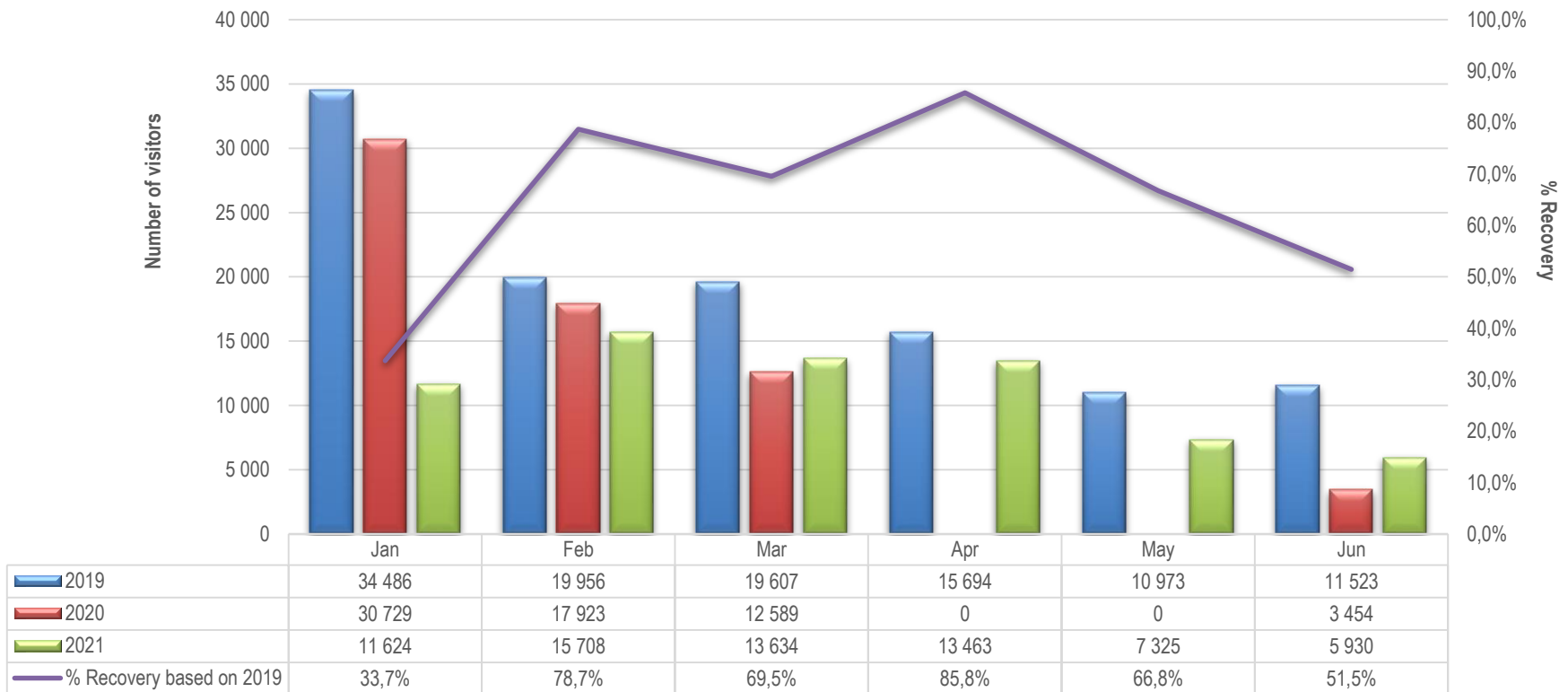


**Performance of Weskus Attractions:
January-June 2021**

5. Performance of Weskus Attractions

- Over the last 18 months the tourism industry was one of the hardest hit by the global COVID-19 pandemic. In spite of the significant impact, the West Coast National Park welcomed over 67,000 visitors between January and June 2021. The park recorded a year-on-year growth of 5% when compared to the number of visitors recorded across the same period in 2020 (64,695).
- By month, a positive year-on-year increase was achieved during March (8.3%) and during June the park experienced an increase of 71.7% when compared to June 2020. Unfortunately no comparison could be conducted between April and May due to the closure period in 2020.
- The Park's recovery into the first six months of 2021 has been progressing very well, reflecting over 50% recovery in visitor levels across each month when compared to 2019 (with the exception of January; 33.7% recovery).

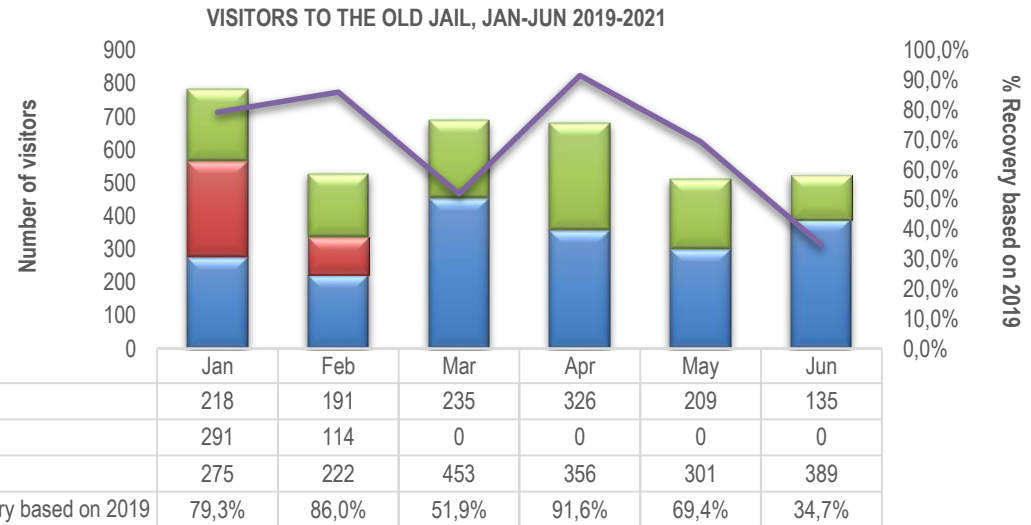
VISITORS TO THE WEST COAST NATIONAL PARK, JAN-JUN 2019-2021



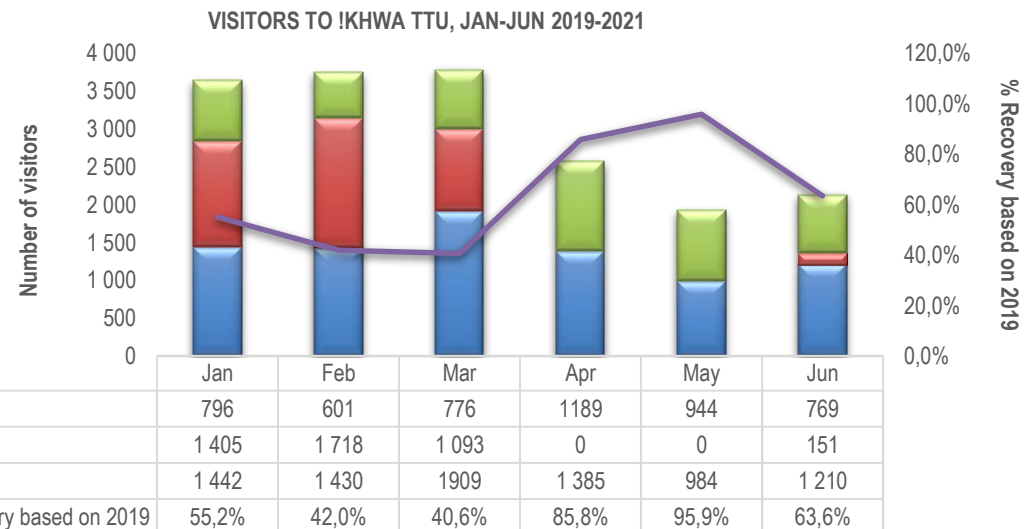
Source: SANParks, 2021

5. Performance of Weskus Attractions

- The Old Jail welcomed 1,314 visitors between January and June 2021, welcoming the highest number in April (326) and March (235).
- In spite of the Old Jail being closed between March and June 2020, the attraction has shown strong resilience and is recovering well based on 2019 visitor levels.
- February and April performed very well and recorded a % recovery of 86,0% and 91,6% respectively.



- !Khwa ttu welcomed slightly over 5,000 visitors between January and June 2021 and has portrayed a positive recovery when compared to 2019 visitor movement.
- Across the period under review, !Khwa ttu recorded over a 1,000 visitors during the month of April 2021. Unfortunately April and May could not be compared to 2020 due to the closure period.
- However, when compared to 2019 visitor levels, !Khwa ttu has showed a remarkable recovery during April and May 2021, reaching levels of 85,8% and 95,9% respectively.

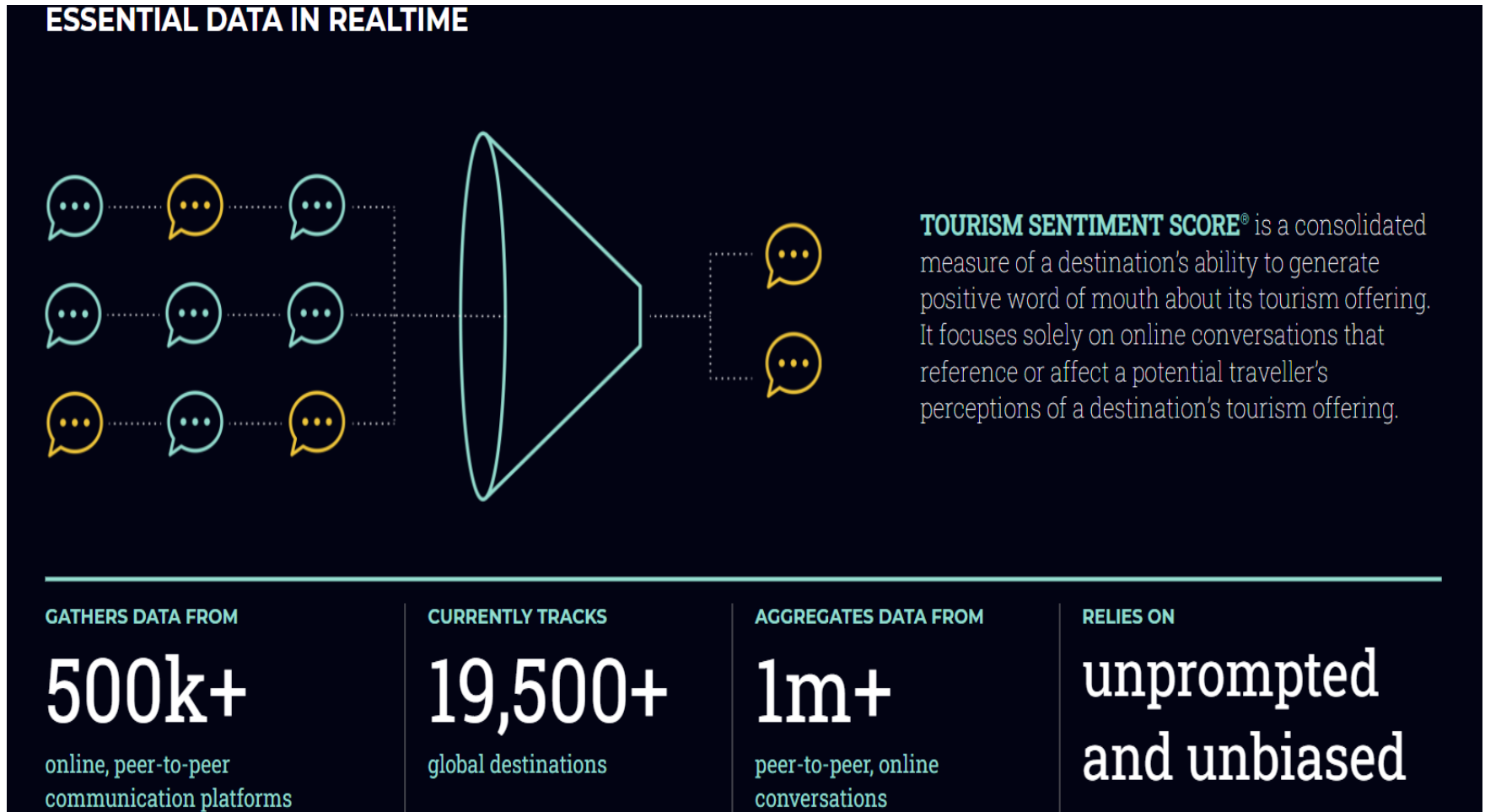




**Tourism Sentiment in Paternoster:
January-June 2021**

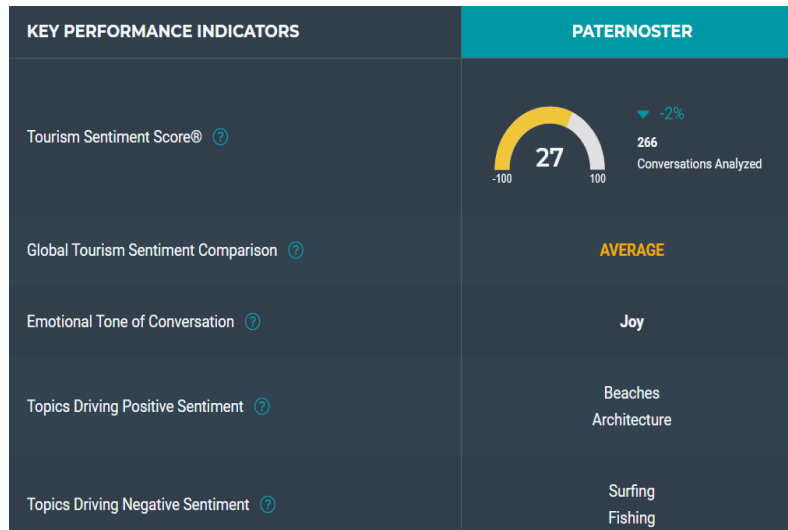
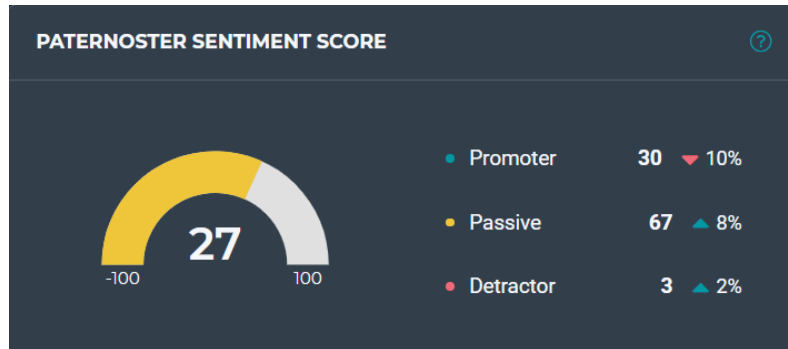
6. Tourism Sentiment in Paternoster

- In 2021 Wesgro attained the Tourism Sentiment Index (TSI) data package which provides a **Tourism Sentiment Score®** for Cape Town and the Western Cape.
- The sentiment score is a consolidated measure of a destination's ability to generate positive word of mouth about its tourism offering in real time. It focuses solely on online conversations that reference or affect a potential traveller's perceptions.



6. Tourism Sentiment in Paternoster

- Paternoster's Tourism Sentiment score is considered average at 27, compared to the rest of the world. Around 30% of online conversations were actively recommending or speaking positively about the destination and 3% were discouraging or speaking negatively about Paternoster. The remaining (67%) spoke about the destination from an indifferent or passive point of view.
- Over the period January to June 2021, the Tourism Sentiment in Paternoster was driven by positive conversations around beaches and architecture, while the negative sentiments revolved around surfing and fishing.
- The top three sentiment categories that emerged for Paternoster was culture/history, outdoor activities and relaxation/wellness. As depicted in the figure below, conversations around all sentiment categories were positive, apart from safety which revealed no emotional tone. "Relaxation/wellness" was the category that achieved the highest score at 52.



		PATERNOSTER		
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment
▲ Culture + History	<div><div></div></div>	39% ▲ 37%	Joy	32 Average
▲ Outdoor Activities	<div><div></div></div>	34% ▼ 14%	Joy	5 Average
▲ Relaxation + Wellness	<div><div></div></div>	16% ▼ 4%	Joy	52 High
▲ Safety	<div><div></div></div>	4% ▲ 4%	N/A	3 Average
▲ Food + Culinary	<div><div></div></div>	4% ▼ 15%	Joy	28 Average
▲ Destination Services	<div><div></div></div>	4% ▼ 7%	Joy	33 Average
▲ Amenities + Entertainment	<div><div></div></div>	1% ▲ 1%	Joy	0 N/A

7. Acknowledgements

Acknowledgements and many thanks go to the West Coast District Municipality and the following tourism offices 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 Weskus:

- *Clanwilliam Tourism*
- *Darling Tourism*
- *Hopefield Tourism*
- *Langebaan Tourism*
- *Paternoster Tourism*
- *Piketberg Tourism*
- *Porterville Tourism*
- *Vanrhynsdorp Tourism*
- *Velddrif Tourism*
- *Vredenburg Tourism*
- *Vredendal Tourism*
- *Yzerfontein Tourism*
- *Goedverwacht Tourism*
- *Lamberts Bay Tourism*
- *Riebeeck Valley*
- *Mooreesburg and*
- *Malmesbury Tourism.*

The participating attractions in the Weskus:

- *West Coast National Park*
- *!Khwa ttu and*
- *The Old Jail.*

Tourism Sentiment Index (TSI)

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