Western Cape Regional Trends

WESGRO
cape town & western cape
research

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Contents

1. Methodology

- This report provides an overview of the tourism trends and patterns in the Western Cape. 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 <u>sample</u> 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:*** *<u>Tourist:</u> 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

From January to June 2021, a total of **2,805** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. The participating regions were:

Region	Number of Surveys
Cape Overberg	1 303
Garden Route	204
Weskus	826
Winelands	472
Total	2 805

3. Executive Summary

- The regional spread of visitors across the Western Cape reflected a share of 5.2% from the overseas and 94,8% from the domestic market. The larger share of visitors from the domestic market can largely be attributed to international travel restrictions brought on by COVID-19.

- Top international markets; Germany (37.2%) and the United Kingdom (13,8%) continued to travel to the Western Cape, however, at a much smaller scale due to strict outbound travel regulations. These markets have proven to be the Western Cape's mainstay markets throughout the most challenging periods.

- In addition to COVID-19 related travel restrictions hampering the tourism sector, economic and financial constraints remains one of the leading challenges in domestic travel. Despite the sudden halt in tourism activity since March 2020, visitor trends indicate that the majority of domestic travellers originated from the Western Cape (86,4%); confirming that locals mainly travelled within their own province.

- Outdoor activities (16.9%), scenic drives (14.8%) and cuisine (14.1%) ranked as the top three activities enjoyed by visitors to the Western Cape. Visitors were mainly between the age groups of 36-50 and 51-70 years.

- Slightly over 40% of visitors travelled to the Western Cape on their own while 39,8% travelled in pairs. Own motor vehicles (72,4%) ranked as the top transport choice amongst visitors, followed by rented cars (10.9%) and public transport (3.6%).

- 40,4% of respondents indicated overnight stays in the province, while 59.6% were day visitors. Visitors stayed on average one, two and three nights in the region. Self-catering, Guesthouses, B&Bs and Hotels ranked as the top accommodation choices amongst travellers.

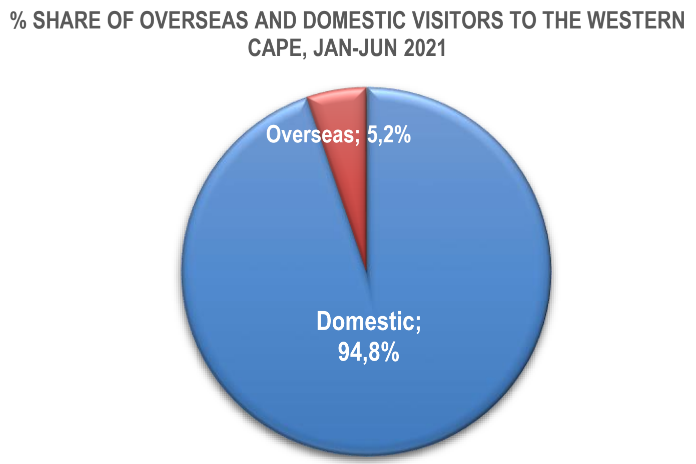
- In 2021 Wesgro attained the Tourism Sentiment Index (TSI) data package which provides a **Tourism Sentiment Score®** for the Western Cape.

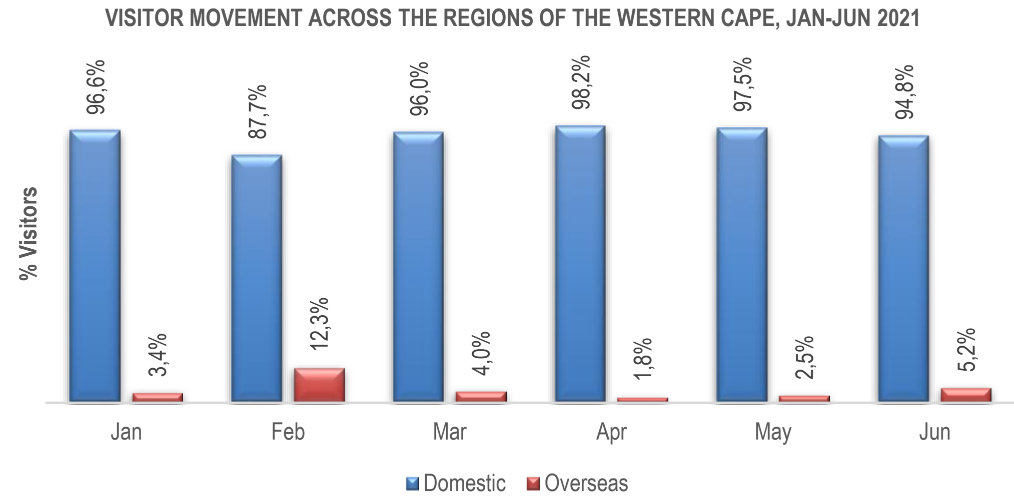
- The Western Cape's Tourism Sentiment score is considered average at 24, compared to the rest of the world. 28% of online conversations were actively recommending or speaking positively about the province and 3% were discouraging or speaking negatively. The remaining (69%) spoke about the Western Cape from an indifferent or passive point of view.

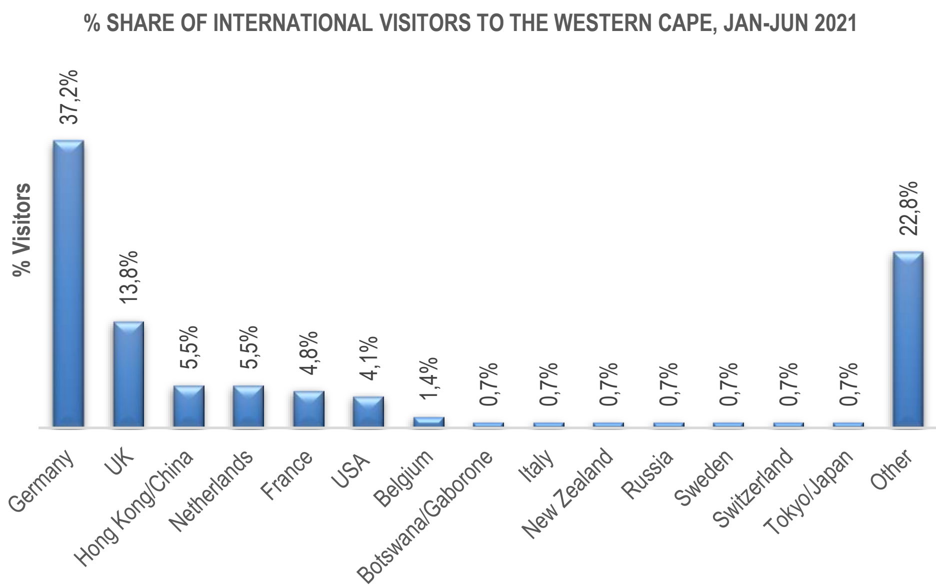
- Over the period January to June 2021, the Tourism Sentiment in the Western Cape was driven by positive conversations around wineries, vineyards and beaches, while the negative sentiments revolved around natural disasters and accommodation.

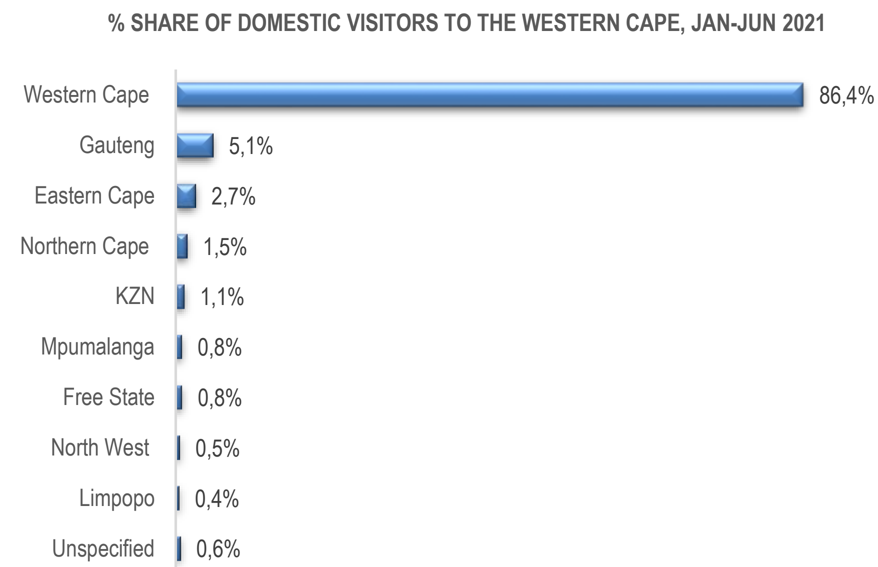
4. Western Cape Visitor Trends & Patterns

4.1 Origin of Visitors



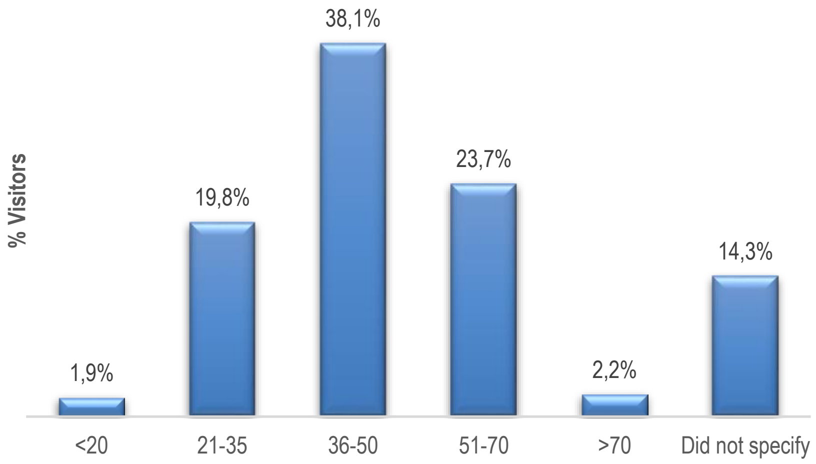






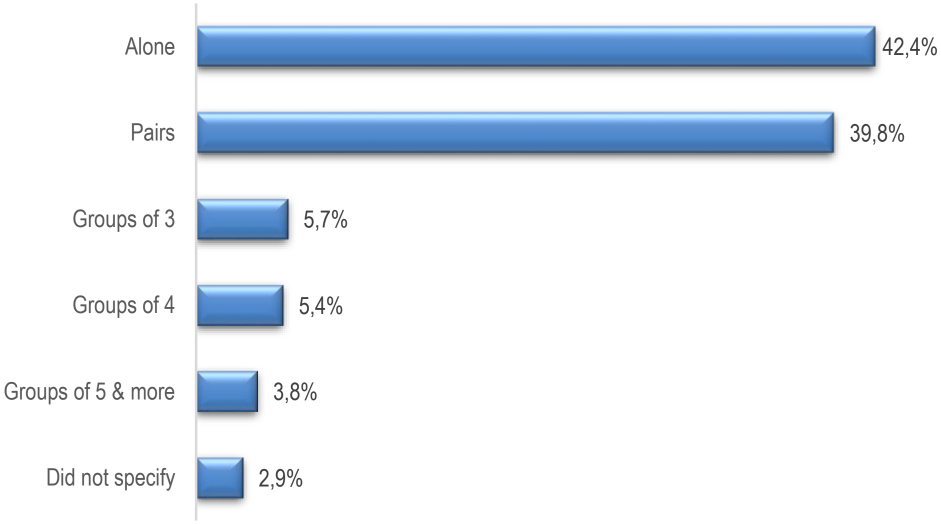
4. Western Cape Trends and Patterns

4.2 Age Profile of Visitors

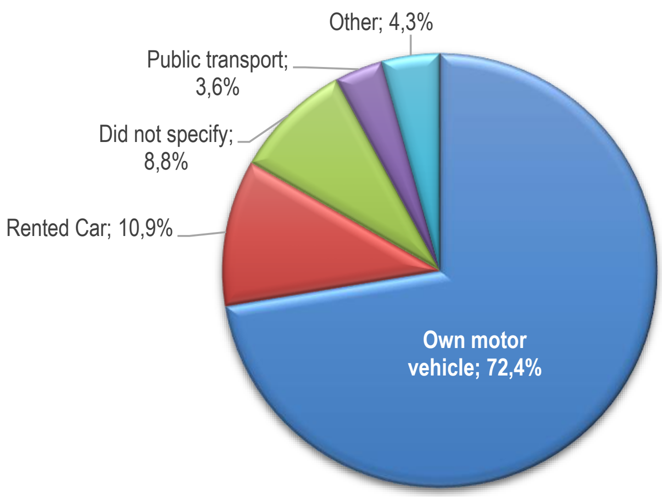


- The age groups 36-50 and 51-70 years emerged as the most common amongst visitors to the Western Cape. 21-35 years followed as the third largest share of respondents.
- Travelling alone (42.4%) ranked as the most prominent travel group, followed by 39,8% who travelled in pairs.
- Own motor vehicles (72,4%) ranked as the top transport choice amongst visitors, followed by rented cars (10,9%) and public transport (3.6%).

4.3 Travel Group Size



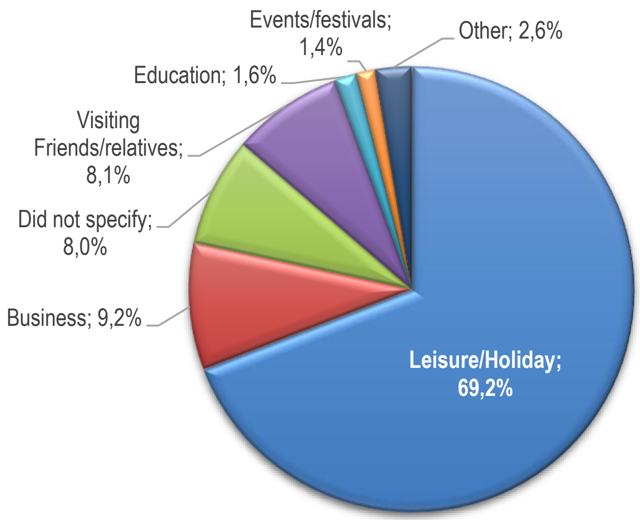
4.4 Mode of Transport



Other: Includes mini bus taxis, shuttle services, long distance buses, passenger cruise liners, motorbikes and tour buses.

4. Western Cape Trends and Patterns

4.5 Main purpose of visit



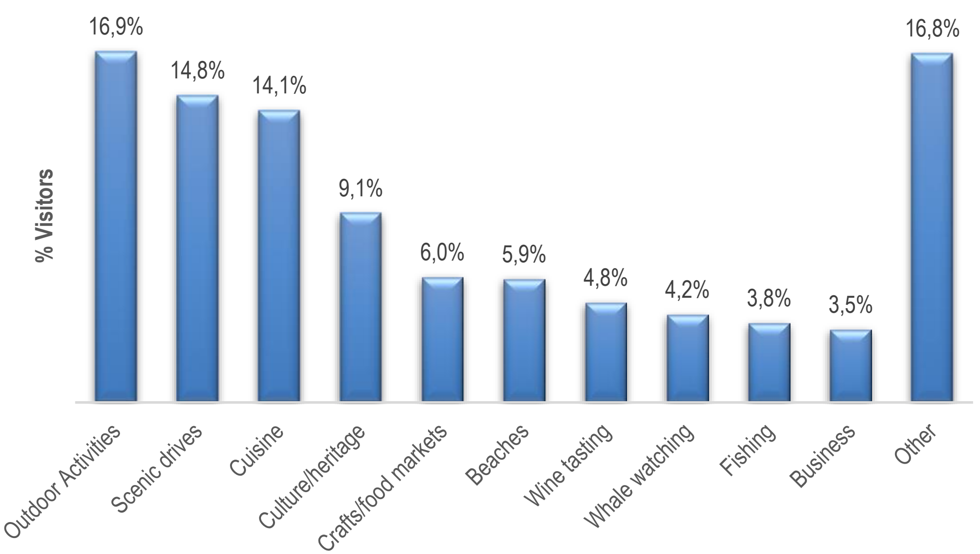
**Other: Includes travel for seasonal/migrant work, Honeymoon/Weddings, Religion, Medical/health (spa, surgery, wellness) and sport.*

- Holiday/leisure (69,2%) led as the top reason for travel to the province, followed by business travel (9.2%), Visiting Friends/Relatives (8,1%), and Education (1.6%).

- Outdoor activities (16.9%), scenic drives (14.8%) and cuisine (14.1%) ranked as the top three activities enjoyed by visitors to the Western Cape.

- The Western Cape government together with Wesgro have been mandated to develop key strategies for identifying niche markets. Plans are well advanced for establishing the Cape as the Cycling Capital of Africa. Culture/heritage has recently also emerged as a priority niche tourism market for the province, with the launch of the Cradle of Human Culture Route with three anchor sites in the Western Cape.

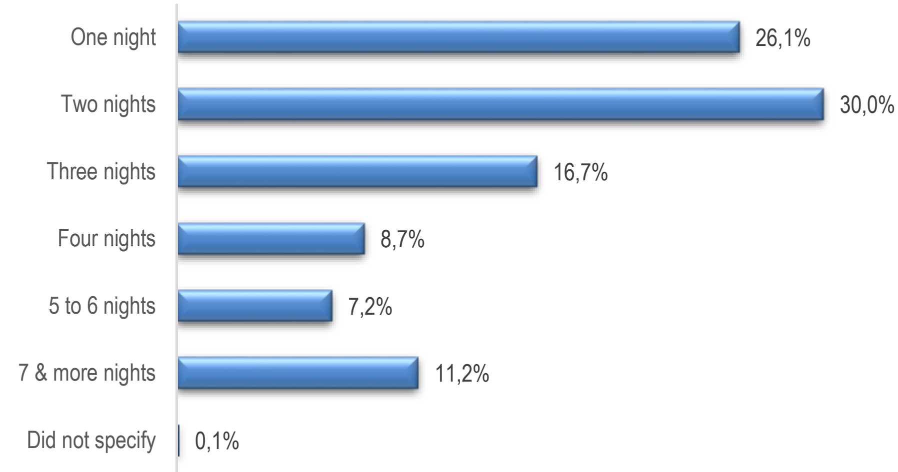
4.6 Top activities undertaken in the Western Cape



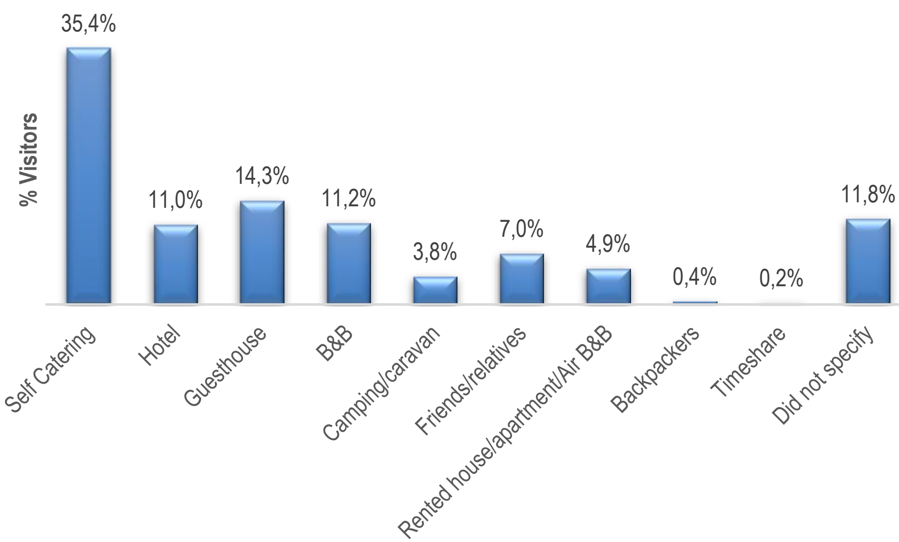
4. Western Cape Trends and Patterns

4.7 Overnight vs. Day Visitors

4.8 Average length of stay



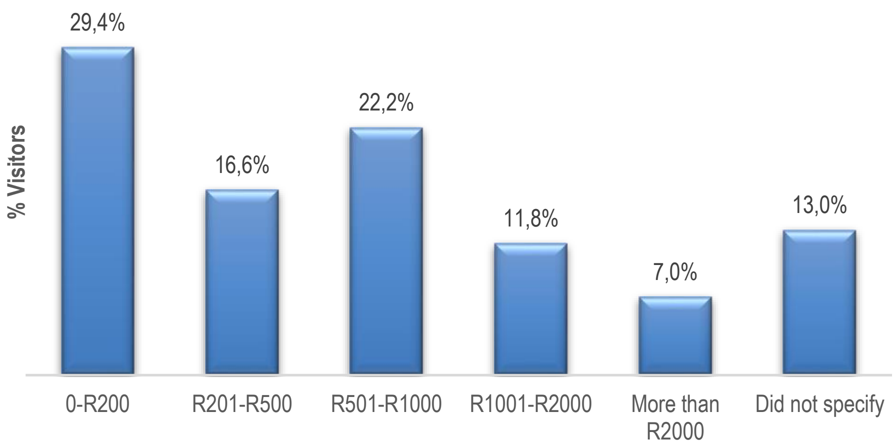
4.9 Accommodation Usage



- Between January and June 2021, 40,4% of respondents indicated overnight stays in the province, while a share of 59.6% were day visitors. When taking a closer look at the trend in length of stay, visitors stayed on average one, two and three nights in the region.
- This trend underlines the Western Cape's popularity in weekend getaways, as well as extended leisure holidays for up to a week and more (11,2%).
- Self-catering, Guesthouses, B&Bs and Hotels ranked as the top accommodation choices amongst travellers. Of the respondents who indicated overnight stays, a share of 11,8% did not indicate their type of accommodation in the survey.

4. Western Cape Trends and Patterns

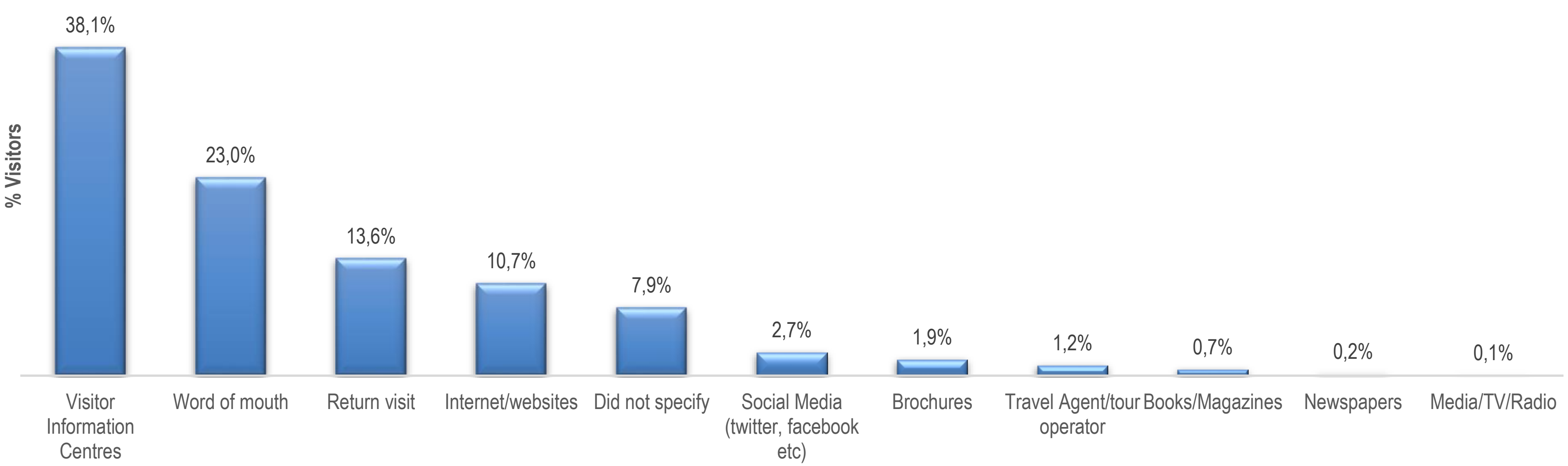
4.10 Average daily spend



- Tourism is one of the Western Cape's strongest economic drivers. On average, visitors spent between 0-R200 (29.4%) per day in the Western Cape. R501-R1000 (22,2%) followed as the second most common expenditure range, and 16.6% of respondents spent on average R201-R500 per day. 13% of respondents did not indicate their average daily spend in the Western Cape.

- Visitor Information Centres (38,1%) and word of mouth (23,0%) ranked as the top sources for obtaining information on the province. 13.6% of respondents were return visitors, a trend which indicates much success in the tourism sector's marketing efforts.

4.11 Top Information Sources



5. Tourism Sentiment in the Western Cape

- 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 data package also provides specific insight into a **COVID-19 Crisis Index**.

- 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.

Source: TSI, 2021

5. Tourism Sentiment in the Western Cape

- The Western Cape's Tourism Sentiment score is considered average at 24, compared to the rest of the world. 28% of online conversations were actively recommending or speaking positively about the province and 3% were discouraging or speaking negatively. The remaining (69%) spoke about the Western Cape from an indifferent or passive point of view.
- Over the period January to June 2021, the Tourism Sentiment in the Western Cape was driven by positive conversations around wineries, vineyards and beaches, while the negative sentiments revolved around natural disasters and accommodation.
- The top three sentiment categories that emerged for the Western Cape were outdoor activities, food/culinary and safety. As depicted in the figure below, conversations around all sentiment categories were positive, apart from safety which brought on a sad tone.

WESTERN CAPE SENTIMENT SCORE

24 (-100 to 100)

Promoter	28	▼ 1%
Passive	69	▲ 0%
Detractor	3	▲ 1%

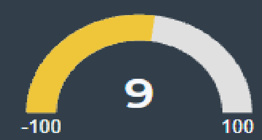
KEY PERFORMANCE INDICATORS	WESTERN CAPE
Tourism Sentiment Score®	24 (-100 to 100); ▲ 13%; 50622 Conversations Analyzed
Global Tourism Sentiment Comparison	AVERAGE
Emotional Tone of Conversation	Joy
Topics Driving Positive Sentiment	Winery + Vineyards Beaches
Topics Driving Negative Sentiment	Natural Disaster Accommodation

CATEGORIES	VOLUME COMPARISON	WESTERN CAPE Volume	WESTERN CAPE Emotion	WESTERN CAPE Sentiment
Outdoor Activities		29% ▲ 0%	Joy	23 Average
Food + Culinary		16% ▲ 2%	Joy	30 Average
Safety		13% ▲ 8%	Sadness	-16 Average
Relaxation + Wellness		11% ▼ 3%	Joy	30 Average
Destination Services		11% ▼ 4%	Joy	27 Average
Culture + History		8% ▲ 1%	Joy	22 Average
Amenities + Entertainment		7% ▼ 1%	Joy	32 Average
Access + Transportation		5% ▼ 3%	Joy	12 Average

Source: TSI, 2021

6. Tourism Sentiment Index: COVID-19 Crisis Index

- At a glance, the below summary provides an indication of the current state of the Western Cape as it relates to the COVID-19 crisis.
- Over 7,000 online conversations were analysed for the Western Cape and the global crisis sentiment comparison was considered average at 9. Of all online conversations, 17% actively promoted the Western Cape, 8% of conversations were negative and 75% held a passive tone.
- The overall emotional tone of conversations for the Western Cape was sadness. The positive sentiments were specifically centered around medicine, treatments, technology and tourists, while the negative sentiments were driven by conversations around infections, mortality rate and regulations.

KEY PERFORMANCE INDICATORS	WESTERN CAPE
Crisis Sentiment Score	 9 -100 100 -67% 7332 Conversations Analyzed
Global Crisis Sentiment Comparison	AVERAGE
Emotional Tone of Conversation	Sadness
Topics Driving Positive Sentiment	Medicine / Treatment / Technology Tourists
Topics Driving Negative Sentiment	Infection / Mortality Rate Regulations

Source: TSI, 2021

6. Tourism Sentiment Index: COVID-19 Crisis Index

- By understanding what drives the conversations around COVID-19, tourism marketers in the Western Cape can learn which perceptions is top of mind amongst their audiences.

- The figure depicted below indicates the current strengths of the Western Cape and where it faces challenges as a tourism destination.

- The highest volume of conversations were centered around Health Services in the Western Cape (64%). Travel was the second most common online conversation and revealed a positive emotion (Joy) amongst audiences.

		WESTERN CAPE		
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment
Health Services		64% ▲ 10%	Sadness	1 Average
Travel		10% ▼ 6%	Joy	20 Average
Businesses		8% ▲ 0%	Sadness	12 Average
Government / Politics		7% ▼ 3%	Sadness	5 Average
Society		7% ▲ 0%	Sadness	22 Average
Finance / Economics		4% ▼ 1%	Sadness	11 Average

Source: TSI, 2021

7. 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 Garden Route & Klein Karoo
Cape Karoo
Cape Overberg
Cape Town
Weskus
Cape Winelands

Tourism Sentiment Index (TSI)