



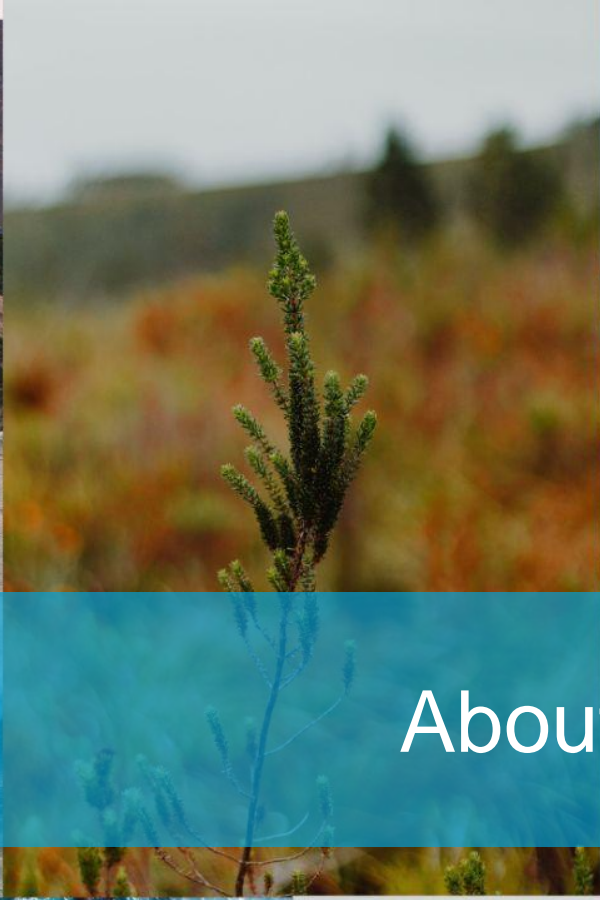
# Collection of Inbound Tourism Statistics at Provincial Level

Eva Marumo, Wesgro  
July 2023

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# About Wesgro





# Wesgro is the Official Tourism, Trade & Investment Promotion Agency for Cape Town and the Western Cape

First point of contact for foreign investors and local companies. Attracts and facilitates national and international investment, works to grow the exports of products and services, and markets the Western Cape as a competitive business and travel destination.

# WESGRO

**Investment Attraction & Facilitation**  
(incl Invest SA One Stop Shop)

**Trade Promotion & Facilitation**  
(incl Film & Media)

**Tourism Promotion & Facilitation**  
(incl Convention Bureau)

**Marketing and Innovation**  
Central Knowledge Hub

**Edu Access**

**Cape Town Air Access**

**Cruise Cape Town**

# Purpose of the Regional Visitor Tracking Survey

- To collect primary tourism research that informs marketing strategy for stakeholders, the tourism industry and Wesgro.
- The data is used as a proxy to indicate key trends within the Western Cape on a regional and local level.
- To track specific trends, patterns and travel behaviour of tourists to the Western Cape.
- To provide an indication of average tourist expenditure patterns in the Western Cape.





# Primary Research Methodology

- **Approach:** Self administered survey questionnaire
- **Survey site:** Collected by Local Tourism Office officials across the six regions of the Western Cape on behalf of Wesgro.
- **Questionnaire:** 13 indicators are measured (Socio-demographics and travel behaviour of international and domestic visitors)
- **Sample:** *It is important to note that the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape and would thus **only represent a sample of total tourists** into the province. Therefore, a percentage share is provided to indicate the key trends and patterns. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.*
- **Data analysis:** Microsoft Excel© and Pivot Table
  - Pivot Table is an excel tool used to assist in automatically sorting and filtering different categories of data for a large dataset to determine significant trends and allows for cross analysis between indicators.
- **Ethical considerations:**
  - Permission and agreement for Local Tourism Offices to assist Wesgro with data collection was granted
  - Consent is obtained by tourists before completion of the survey
  - Voluntary/participative collection approach
  - All data collected is anonymized and does not include any personally identifiable information.

# Primary Research Methodology

- **Limitations and Challenges:**

- Increasing sample size of surveys: Currently only tourists entering the tourism offices are captured.
- Increasing participation of towns across the Western Cape: Not all tourism offices are participating in data collection.
- Looking at a more user-friendly data gathering method: Completing paper-based surveys becomes challenging during the peak season period.
- Wesgro Research's objective is to broaden and extend the survey to attractions and accommodation venues to determine a more accurate count of tourists into the Western Cape.

- **Target Population:** The survey is aimed at all tourists willing to participate and complete a survey when entering a tourism information office.

- **Definitions:** *A "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.*

- **Data Collection Process:**

- Wesgro has developed two survey formats to allow for flexibility and ease of data collection. The paper-based survey is printed and placed at strategic points within the tourism offices to allow for voluntary completion by tourists. Alternatively, an electronic version of the survey was created in excel format which allows for ease of capturing by tourism officials whilst conducting bookings.

# Primary Research Methodology

- **Data capturing and validation:**

- All completed surveys are sent to Wesgro's Research Unit via e-mail on a monthly basis, within the first two weeks of the following month.
- A dedicated data capturer is responsible for capturing all survey data into excel. Once all surveys are captured, a thorough data verification and quality check is conducted to determine accuracy.
- The data analysts will then receive a clean dataset which is analysed through pivot tables and used as a tool to analyse key trends and patterns across all six regions.

- **Stakeholders and data dissemination:**

- Key stakeholders involved in the regional visitor tracking survey includes a partnership between Wesgro and the Regional Tourism Organisations (RTOs), Local Tourism Organisations (LTOs) and regional / local municipalities.
- Survey results are analysed and disseminated in the form of a publication shared on a half-year and annual basis. A total of seven reports are generated covering key trends and patterns for each region as well as trends for the Western Cape.
- Reports are loaded onto the Wesgro Research portal to download and are shared directly with RTOs, LTOs and municipalities to support their marketing strategies.






# Regional Visitor Tracking Tools





# Example of the Visitor Tracking Survey



**regional visitor tracking survey**

## CAPE TOWN & WESTERN CAPE

marketed by **WESGRO**

Please be so kind as to participate in our anonymous visitor survey below. The aim of the survey is to gather key market research trends, which will allow us to enhance and further develop the tourism sector of the Western Cape.

**Country of Origin** ..... **Province of Origin** .....

**1. Your age group:**

≤20    21-35    36-50    51-70    >70

**2. Please indicate your travel group size:**

1    2    3    4    5 & more

**3. Please indicate your length of stay in the Western Cape (number of nights)** .....

**4. Please indicate your length of stay in this town (number of nights)**

1    2    3    4    5-6    7 & more    Day Visitor

**5. Please indicate your main purpose of visit to this town:**

<input type="radio"/> Leisure/holiday <input type="radio"/> Events/festivals <input type="radio"/> Business (meetings, incentives, conferences, exhibitions) <input type="radio"/> Visiting friends and relatives (VFR) <input type="radio"/> Education	<input type="radio"/> Religion <input type="radio"/> Medical/Health (spa, surgery, wellness) <input type="radio"/> Seasonal/migrant worker <input type="radio"/> Sport <input type="radio"/> Honeymoon/weddings <input type="radio"/> Other (please specify): .....
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**6. Main activities participated in during your stay in this town (please select three)**

<input type="radio"/> Meetings/incentives/conventions <input type="radio"/> Expos/exhibitions <input type="radio"/> Events/festivals/concerts/live shows/theatre <input type="radio"/> Gourmet restaurants/cuisine <input type="radio"/> Crafts/food markets/slow markets <input type="radio"/> Culture/heritage/museums/township tours <input type="radio"/> Scenic drives <input type="radio"/> Outdoor activities (Walking/hiking) <input type="radio"/> Beaches <input type="radio"/> Nature Reserves/National Parks <input type="radio"/> Game Reserves (Big 5/game drives) <input type="radio"/> Adventure (mountain biking, diving, rock climbing, bungee jumping, kloofing) <input type="radio"/> Sporting events-participator <input type="radio"/> Sporting events-spectator <input type="radio"/> Cycling	<input type="radio"/> Golf <input type="radio"/> Cruises (Harbour/canal cruises) <input type="radio"/> Whale watching <input type="radio"/> Shark cage diving <input type="radio"/> Fishing <input type="radio"/> Wine tasting <input type="radio"/> Flowers <input type="radio"/> Birding <input type="radio"/> Ostriches <input type="radio"/> Astro-Tourism <input type="radio"/> Karoo Lamb (Farms of the Cape Karoo) <input type="radio"/> Nightlife/clubbing <input type="radio"/> Gambling <input type="radio"/> Shopping <input type="radio"/> Health & wellness/spa <input type="radio"/> Snow
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**7. Type of accommodation used during your stay in this town:**

<input type="radio"/> Day visitor <input type="radio"/> Hotel <input type="radio"/> Guesthouse <input type="radio"/> B&B <input type="radio"/> Self-catering <input type="radio"/> Friends/relatives	<input type="radio"/> Backpackers <input type="radio"/> Camping/Caravan <input type="radio"/> Timeshare <input type="radio"/> Rented house/apartment (Air B&B etc) <input type="radio"/> University Hostel <input type="radio"/> Second home/holiday house <input type="radio"/> Other (please specify).....
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**8. Please indicate where you obtained your information from about the destination:**

<input type="radio"/> Word of mouth <input type="radio"/> Internet/websites <input type="radio"/> Social media <input type="radio"/> Return visit <input type="radio"/> Tourism Information Centre's (VIC's)	<input type="radio"/> Brochures <input type="radio"/> Books/magazines <input type="radio"/> TV/radio <input type="radio"/> Travel agent <input type="radio"/> Newspapers <input type="radio"/> Other.....
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**9. Please indicate main mode of transport:**

<input type="radio"/> Rented car <input type="radio"/> Own motor vehicle <input type="radio"/> Long distance bus <input type="radio"/> Tour bus <input type="radio"/> Mini bus taxi <input type="radio"/> Shuttle service	<input type="radio"/> Metered taxi/taxi service <input type="radio"/> Train <input type="radio"/> Public transport <input type="radio"/> Motorbike <input type="radio"/> Passenger cruise liner <input type="radio"/> Other.....
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**10. Your average daily spend (Excluding accommodation)**

0-R200    R201-R500    R501-R1000    R1001-R2000    More than R2000

**11. Your average daily spend on accommodation during your stay in this town:**

0-R200    R201-R500    R501-R1000    R1001-R2000    R2001-R5000    R5001-R10 000  
 R10 000 and more

Thank you for participating in our survey. This is anonymous information and will be used for research purposes only. Please remember to participate in the next town to make your experience even better the next time you visit the Western Cape.

**Office Use**

Town/City: .....

Month: .....



# Example of the Electronic Visitor Survey using Excel



**Tourism Office Use**

Name of VIC: \_\_\_\_\_

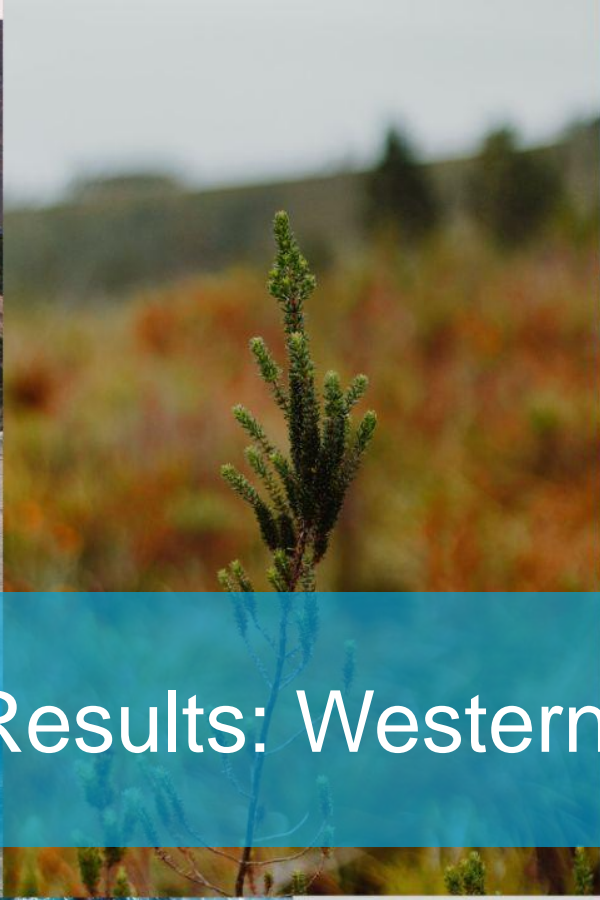
Month: \_\_\_\_\_

- Leisure / Holiday
- Events/festivals
- Business (meetings, incentives, conferences, exhibitions)
- Visiting friends and relatives (VFR)
- Education
- Religion
- Medical / Health (spa, surgery, wellness)
- Seasonal / Migrant Worker
- Sport
- Honeymoon / Weddings
- Other

Date	Age	Country of origin	Province of Origin	Travel Group Size	Length of Stay in this Town	Main Activities in this Town	Type of Accommodation used in this Town	Information Source	Mode of Transport	Average Daily Spend (excl accommodation)	Average Daily Spend on Accommodation

< >
Respondents
Categories
+
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# Latest Results: Western Cape Trends and Patterns





# Western Cape Visitor Trends: Sample Size

Between **January to December 2022**, a total of **10 845** responses to the regional visitor tracking surveys were received from the various tourism offices in the Western Cape. The participating regions are indicated in the table below.

Unfortunately, no surveys are currently collected at the Cape Town Tourism Offices and data collection challenges have been experienced in the Cape Karoo region since Covid-19 in 2020.

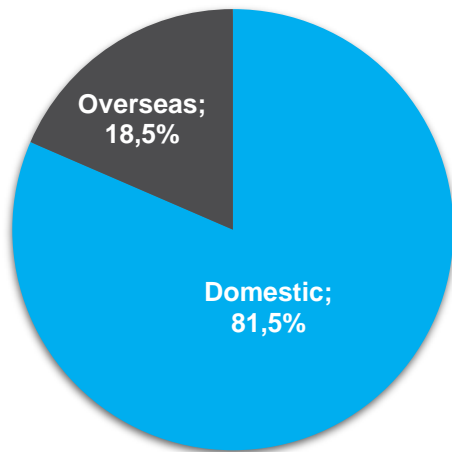
Region	Number of Surveys (Jan-Dec 2022)
Garden Route & Klein Karoo	522
Overberg	4 472
West Coast	2 438
Winelands	3 413

# Visitor Trends & Patterns

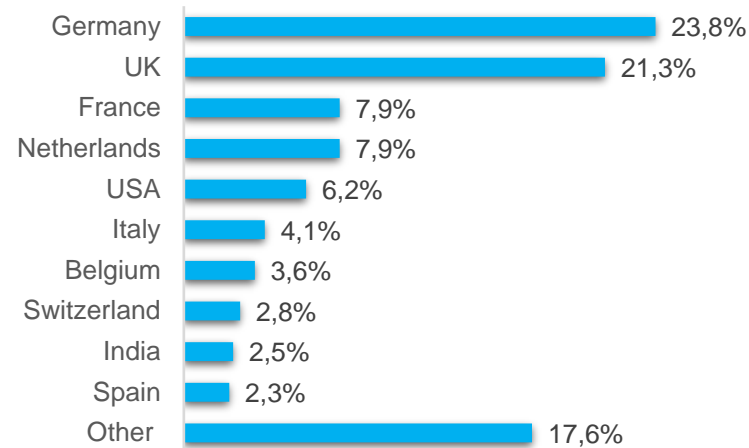
## Origin of Visitors

- The domestic market accounted for the largest share (81.5%) of respondents between January and December 2022 whereas 18.5% of respondents were overseas travellers.
- Most of the international travellers to the Western Cape originated from Germany. This was followed by the UK, with a share of 21.3% of visitors to the region, and France which accounted for 7.9% of the visitors.
- The largest share of domestic travellers (79.0%) were from the Western Cape, which confirms that locals enjoy the diversity of tourism offerings in the province. Gauteng and KwaZulu-Natal ranked as the other leading source provinces for visitors to the Western Cape.

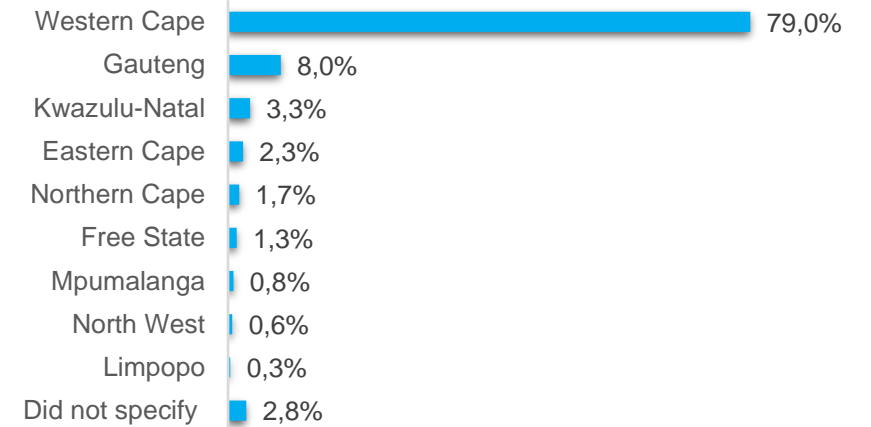
**% SHARE OF OVERSEAS AND DOMESTIC VISITORS TO THE WESTERN CAPE, JAN-DEC 2022**



**TOP INTERNATIONAL MARKETS TO THE WESTERN CAPE, JAN-DEC 2022**



**% SHARE OF DOMESTIC VISITORS TO THE WESTERN CAPE, JAN-DEC 2022**

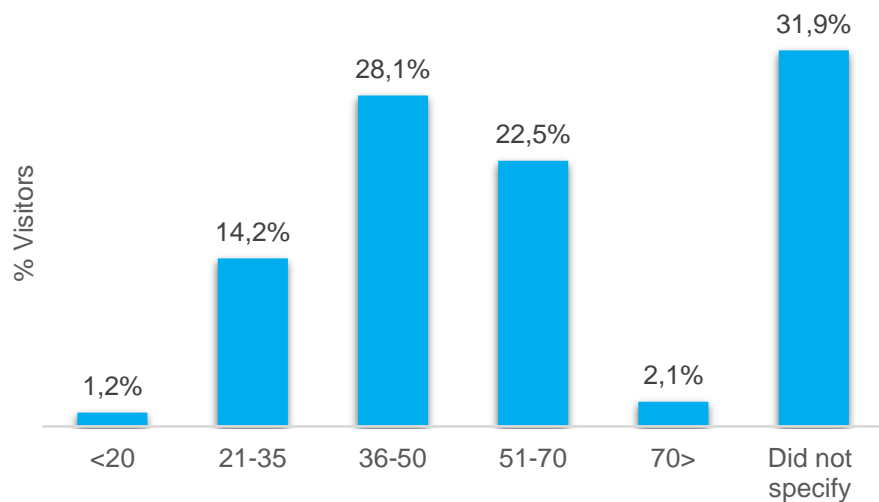




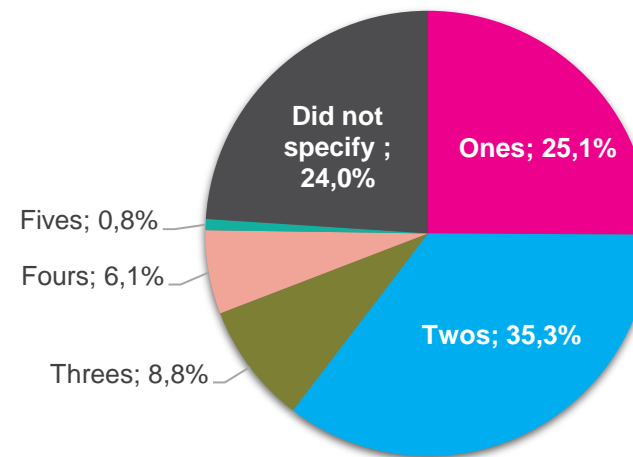
# Visitor Trends & Patterns

- Most visitors to the Western Cape were in the age groups of 36—50 and 51—70 years.
- The largest proportion of respondents (35.3%) travelled to the province in pairs, followed by 25.1% who travelled on their own.
- More than 60% of the visitors travelled to the Western Cape primarily for leisure/holiday and 6.3% visited friends and relatives. Some came for events/festivals (2.6%) and business (3.1%), whereas others visited for purposes of education, medical/health reasons, sports and religion.
- These figures showed that leisure and holiday offerings in the Western Cape were attractive to mostly adults and senior citizens who could be classified as solo travellers or visitors travelling as couples or travelling as friends.

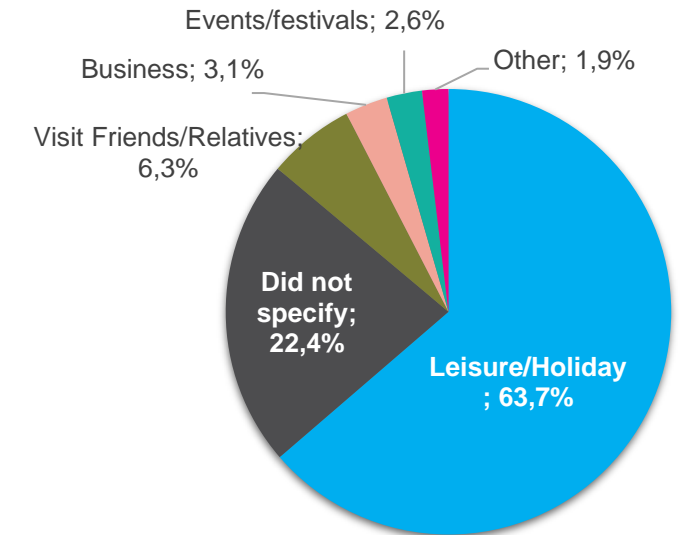
## Age Profile of Visitors



## Travel Group Size



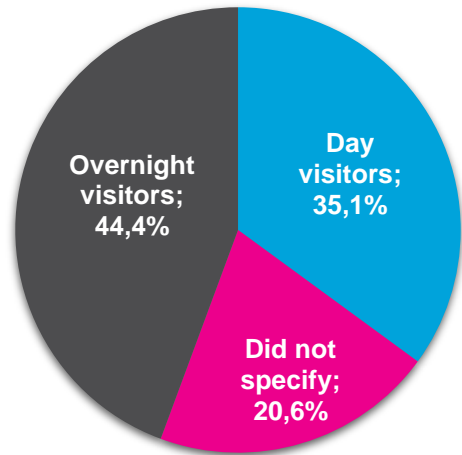
## Purpose of Visit



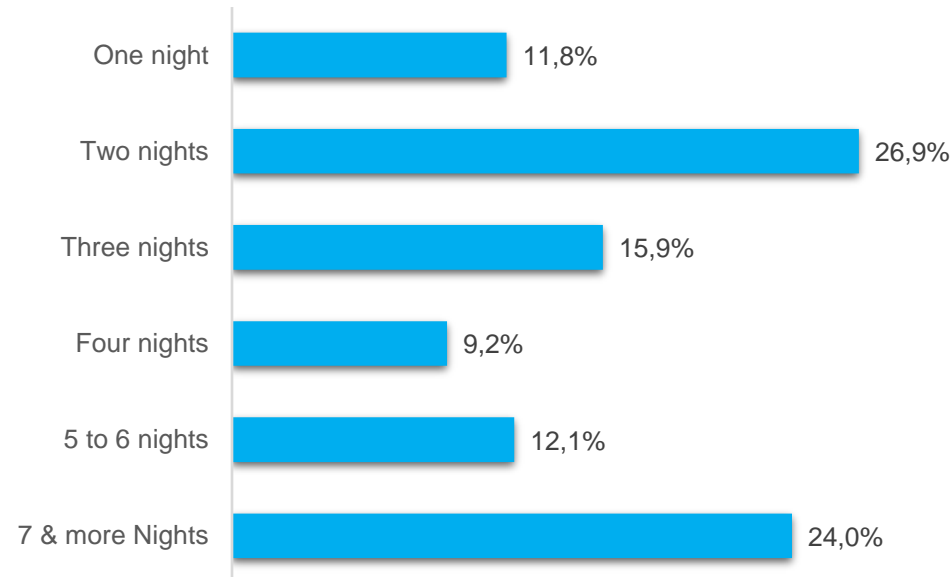
# Visitor Trends & Patterns

- Between January and December 2022, 35.1% of visitors took day trips to the Western Cape regions and 44.4% of visitors stayed overnight. During this period, visitors stayed on average for two, three and seven or more nights in the Western Cape. A relatively high share of respondents (20.6%) did not indicate whether they were day or overnight visitors.
- These figures underline the Western Cape's popularity as a place for weekend getaways. Extended holidays of up to a week and more ranked as the second most popular length of stay among visitors (24.0%).
- Self-catering establishments, guesthouses, bed and breakfast (B&B) and hotels ranked as the top accommodation choices among travellers. This indicates that most visitors preferred accommodation that was affordable, offered flexibility of location and provided them with the freedom to prepare their own meals.

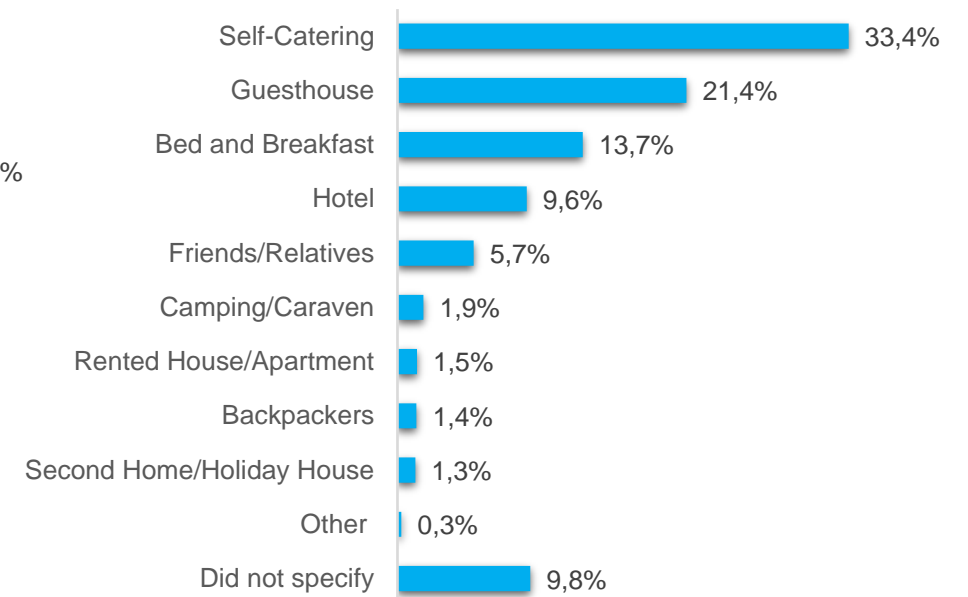
## Overnight & Day Visitors



## Average Length of Stay



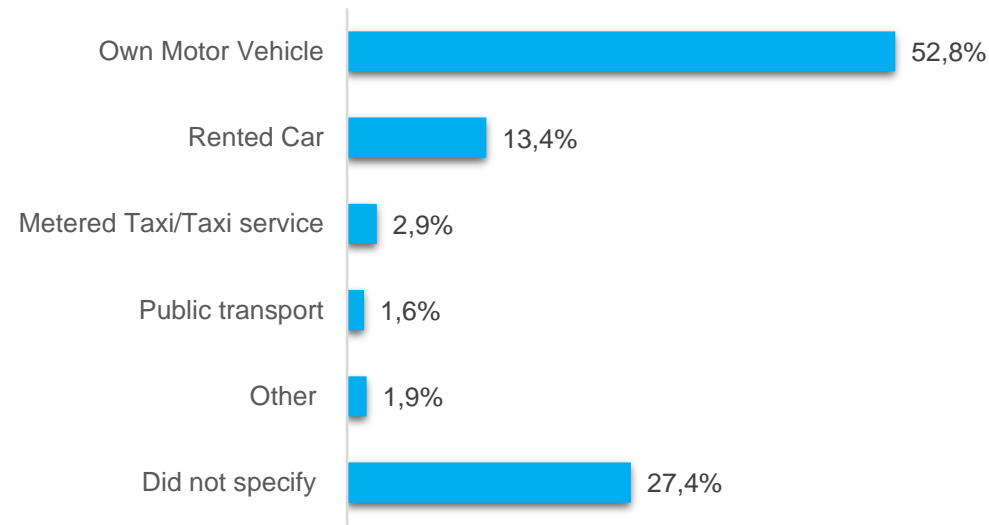
## Accommodation Usage



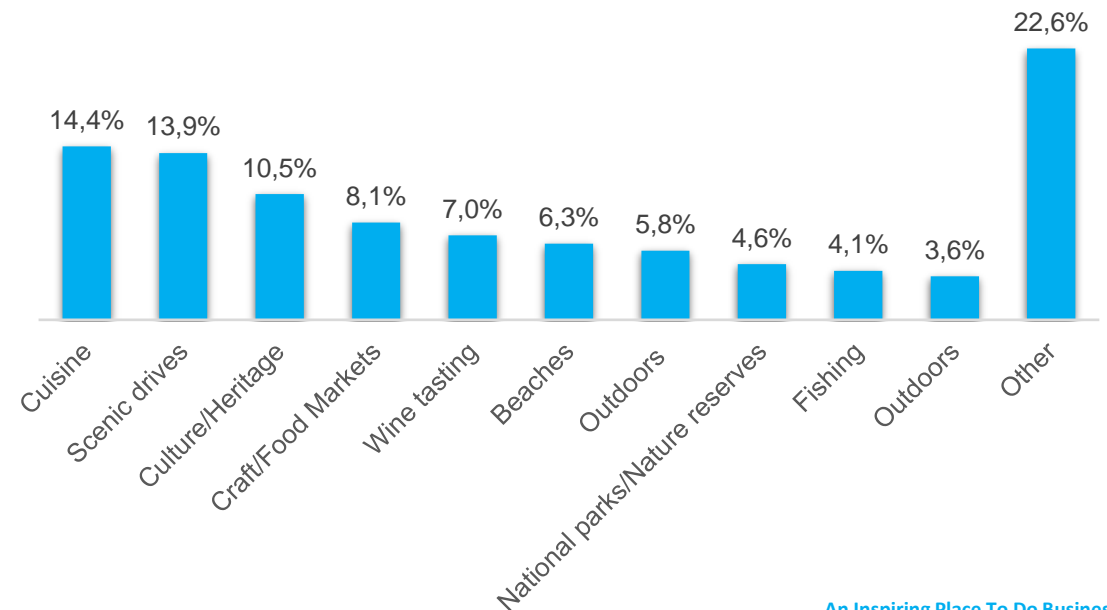
# Visitor Trends & Patterns

- Some 52.8% of visitors to the Western Cape preferred to use their own vehicles. This was largely due to the fact that most visitors who travelled in the region were from the Western Cape. Rented cars (used by 13.4% of visitors) ranked as the second most popular type of transport choice.
- The top three activities enjoyed by visitors to the Western Cape were cuisine (enjoyed by 14.4% of visitors), scenic drives (13.9%) and cultural / heritage activities (10.5%). These activities were followed by crafts/food markets, wine tasting, visits to beaches, and outdoor activities. Other activities include whale watching, adventure, shopping, exhibitions and flowers.
- According to an article published in *Daily Maverick* (2023,14 April) visitors want to experience the “real” connection that comes with cuisine or craft/food markets, cultural/heritage experiences and scenic drives connected a destination. Making these activities unique tourism offerings that played a role in drawing visitors to the various regions in 2022.

## Mode of Transport



## Top Activities Undertaken in Western Cape

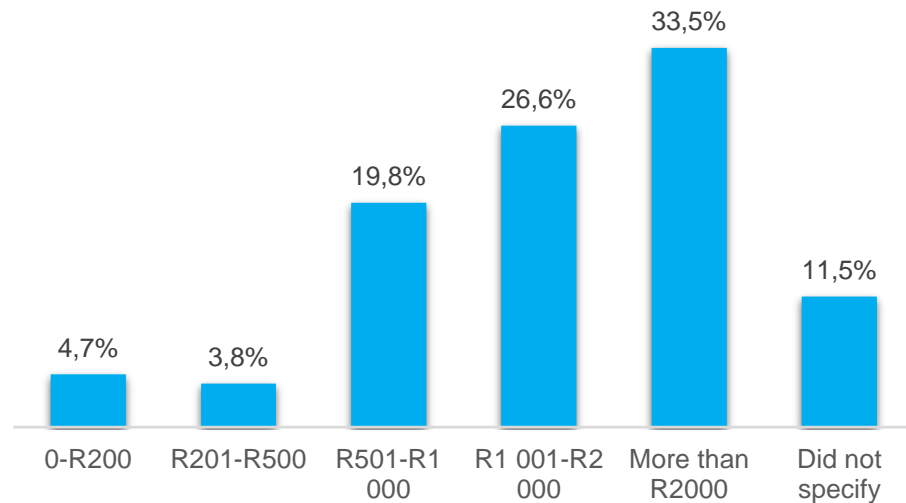




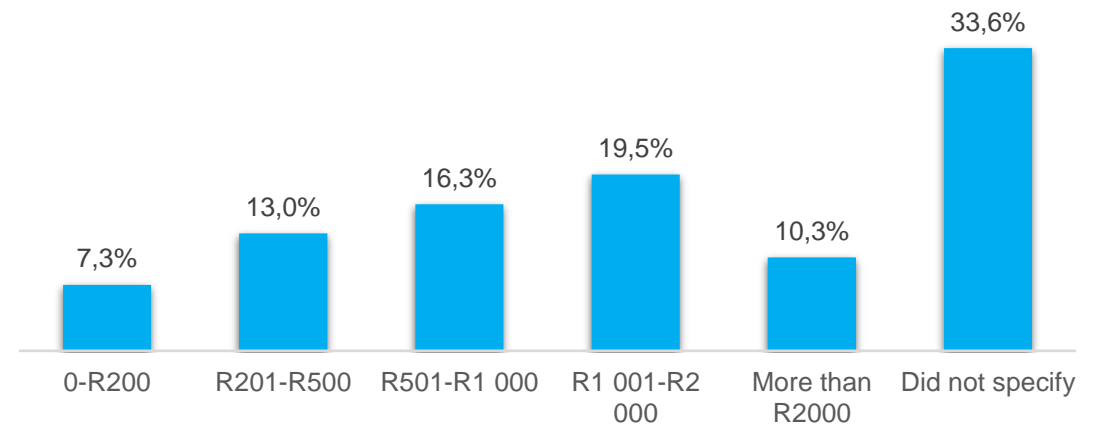
# Visitor Trends & Patterns

- Aspects such as country of origin, age, size of travel group, reasons for visit, choice of accommodation, type of transport used, the type and number of activities taken, length of stay, month/season for trips and information sources play an important role in influencing visitors' spending behaviour.
- More than 30% of visitors spent more than R2000 on accommodation during their overnight stays in the Western Cape, followed by 26.6% who indicated an average expenditure of R1 001-R2 000, and 19.8% who spent an average of R500-R1 000 daily.
- Regarding average daily spend, 19.5% of visitors spent R1 001-R2 000, followed by 16.3% who indicated an average expenditure of R501-R1 000.
- Although most respondents (33.6%) did not specify their average daily spend, visitors can be classified as medium spenders. This is based on the average amounts they spent on accommodation. This is something that could be used in effective targeting and promotion of accommodation establishments and activities in the Western Cape.

## Average Spend on Accommodation



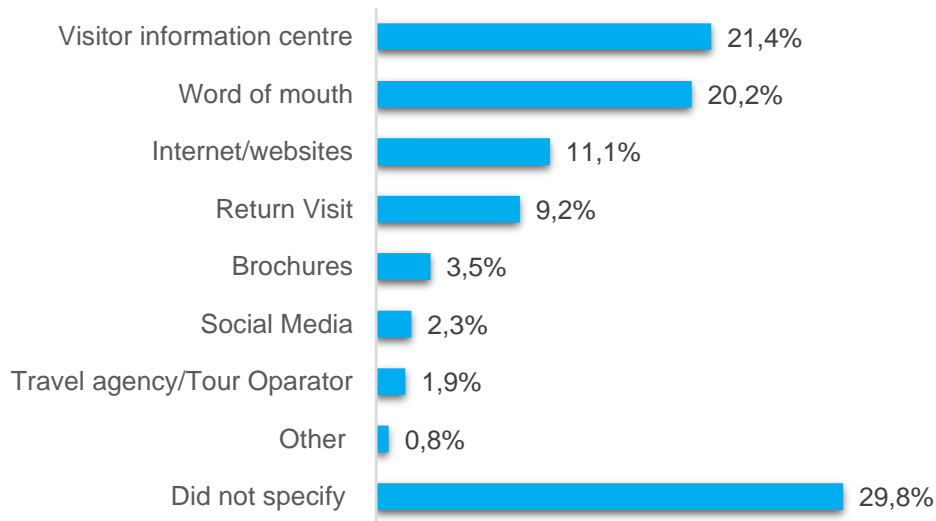
## Average Daily Spend



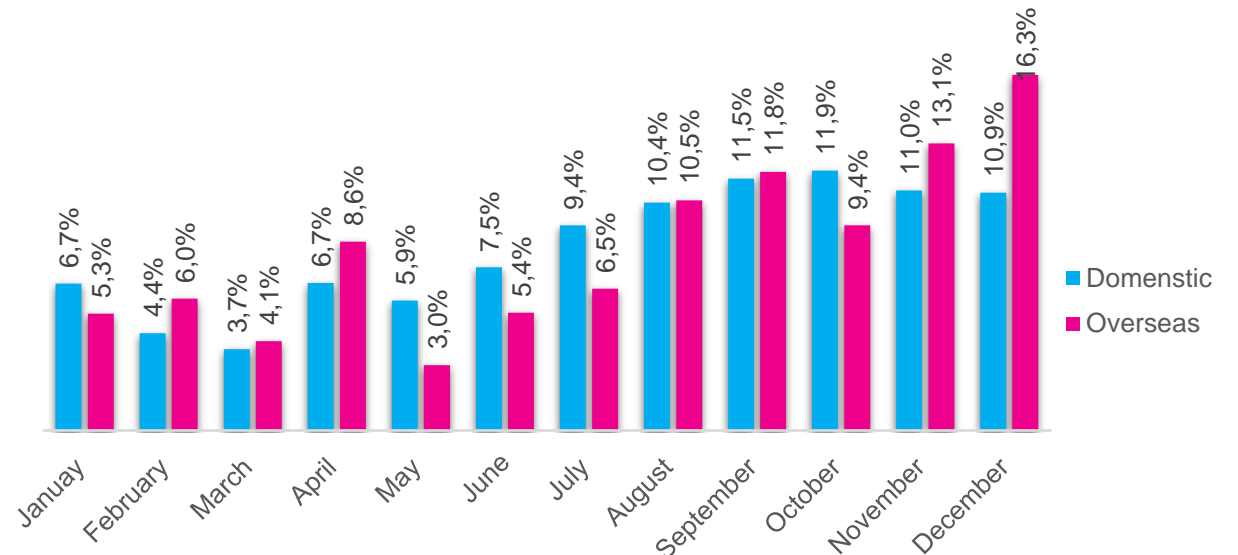
# Visitor Trends & Patterns

- Consumer studies report that information sources can influence an individual’s decision-making process when preparing for a trip, choosing a destination and the type of experiences/activities and accommodation establishments.
- Visitor information centres ranked as the top information sources with some 21.4% of visitors making use of them between January and December 2022, while 20.2% of visitors relied on word of mouth and 11.1% on the internet/websites. This indicates that local visitor information centres and information from relatives/friends/co-workers were effective in promoting the different regions in the Western Cape.
- Most domestic visitors travelled to the Western Cape between July to December 2022, while April and August to December 2022 were the preferred months for overseas visitors. These were preferred months for domestic visitors because of lower prices before peak season and the overseas market visited when they did because of the enviable weather.

## Top Information Sources



## Movement Across the WC by Month







# Regional Performance in the Western Cape





# Regional Performance in the Western Cape

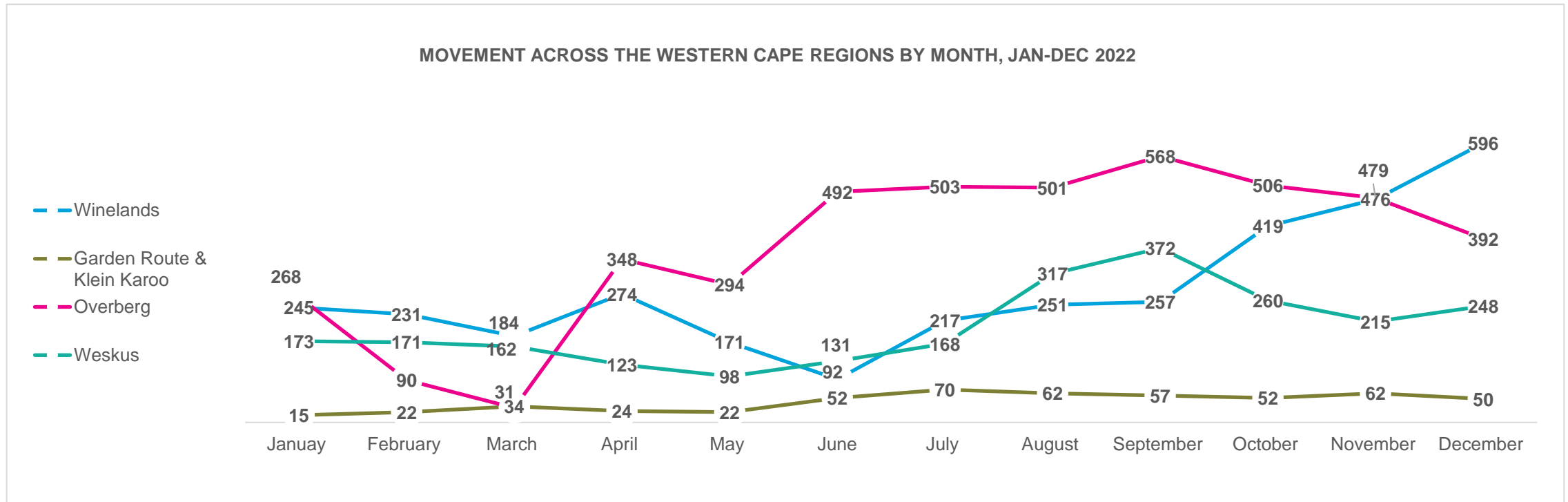
## OVERVIEW OF REGIONAL VISITOR TRENDS AND PATTERNS BY REGION, JAN – DEC 2022

Tourism indicator	Winelands	Garden Route & Klein Karoo	Overberg	Weskus
% Share overseas	14.3%	64.8%	78.5%	15.3%
% Share domestic	85.7%	35.2%	21.5%	84.7%
% Share of overnight visitors	20.7%	81.4%	61.3%	38.5%
% Share of day visitors	15.8%	5.9%	38.7%	61.5%
Top international markets	UK (27.8%)	Germany (26.6%)	Germany (25.9%)	UK (22.8%)
	Germany (25.8%)	UK (15.2%)	UK (18.5%)	Germany (14.5%)
	Netherlands (9.6%)	USA (12.0%)	France (11.9%)	Netherland (10.8%)
	Western Cape (64.2%)	Western Cape (50%)	Western Cape (89.2%)	Western Cape (72.1%)
Top domestic markets	Gauteng (7.2%)	Gauteng (13.6%)	Gauteng (5.2%)	Gauteng (11.2%)
	KZN (2.8%)	Eastern Cape (14,2%)	KZN (2.4%)	KZN & Eastern Cape (4.2%)
Main purpose of visit	Leisure/Holiday (35.5%)	Leisure/Holiday (75.1%)	Leisure/Holiday (74.0%)	Leisure/Holiday (81.7%)
Age profile of visitors	51—70 (13.2%)	36—50 (24.9%)	30—50 (41.7%)	36—50 (30.0%)
Group Size	Pairs (16.2%)	Pairs (42.7%)	Pairs (48.8%)	One person (38.6%)
		Groups of four (18.4%)	One person (30.9%)	Group of two (35.7%)
Length of stay	Two nights (9.1%)	Two nights (21.1%)	Seven & more nights (21.4%)	Two nights (15.3%)
		Seven & more nights (17.6%)	Two nights (11.2%)	One night (12.3%)
Mode of transport	Own motor vehicle (23.1%)	Own motor vehicle (54.8%)	Own motor vehicle (69.2%)	Own motor vehicle (63.9%)
	Rented car (8.7%)	Rented car (33.1%)	Rented car (17.2%)	Rented car (8.7%)
Top information sources	Internet/website (10.8%)	Internet/website (32.2%)	Visitor information centre (41.0%)	Word of Mouth (22.7%)
	Word of Mouth (9.3%)	Word of Mouth (24.3%)	Word of Mouth (26.6%)	Visitor information centre (15.0%)
		Return visits (21.1%)	Return visits (13.5%)	Internet/website (13.4%)
Average daily spend	-	R1 001-R2 000 (27.8%)	R1 001-R2 000 (32.2%)	R502-R1 000 (23.7%)
Type of accommodation	-	Guesthouse (29.1%)	Self-Catering (19.4%)	Self-Catering (24.7%)
Top three activities undertaken	Cultural/Heritage (40.9%)	Beaches (17.4%)	Cuisine (16.3%)	Scenic Drives (22.8%)
	Cuisine (26.6%)	Scenic Drives (12.8%)	Crafts/food markets (10.2%)	Wine Tasting (13.5)

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

# Regional Performance in the Western Cape

- Based on the number of respondents for this primary research, Overberg performed very well with regard to the increase in visitor numbers in comparison with the Winelands, Garden Route, Klein Karoo and Weskus
- Between January to December 2022, visitors were drawn to the Overberg from between June to November, while the Winelands visitor numbers fluctuated in the months of January, February and April, with numbers picking up again from July to December. West Coast had high levels of visitors between August and December, and in Garden Route and Klein Karoo, visitor numbers were slightly high in July and August.





Thank you