

COLLECTION OF INBOUND EASTERN CAPE TOURISM STATISTICS

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Yours to Explore

26 JULY 2023

TOURISM PROVINCIAL WORKSHOP

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PURPOSE OF THE SURVEYS

Data Collection Methodology slightly differs between provincial and local level:

- Tourism Infrastructure and Supply Side Data – Annual audit and on product registration
- Visitor Interception Surveys – At events, VIC's, activations throughout the year
- Accommodation Occupancy Surveys – Monthly Surveys to Accommodation Providers
- Accommodation Occupancy Subscriptions – STR (Hotel), AirDnA.
- Visitor Numbers/Bednights – Calculated from Occupancy Surveys and Visitor Intercept Surveys
- Air Traffic and Passenger Data – Reports provided by ACSA as part of Airlift Committee
- Economic Impact of Tourism on GDP – Calculated from all indicators (locally collected/obtained from other sources)
- Job creation/sustaining figures – Calculated from GDP Contribution based on SA Tourism Averages
- Bookings and Enquiries – Captured by VIC Staff on booking/enquiry made
- Marketing platform trends and performance – Media Monitoring and Analytics
- Event/Conference Impact Assessments (basic assessments) – Online Survey
- Ad hoc surveys to answer specific needs – Study dependant and in partnership with NMU
- Destination awareness and perception surveys – quarterly and ad hoc



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PURPOSE OF THE SURVEYS

Collect real-time tourism data and insights at local and provincial level in order to:

- Measure and monitor tourism performance
- Seek out trends
- Assist in decision making of various aspects including development and marketing initiatives
- Build Visitor Profiles and Demographics for marketing purposes to attract more visitors.



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LIMITATIONS AND CHALLENGES

- Sample sizes / lack of incentives
- Technology
- Cost and budget
- Geographical spread
- No dedicated research unit
- Different entities run different initiatives
- No standardisation of collection, analytics, presentation of research
- Different system not integrated or compatible
- Stakeholder buy-in and collaboration
- Availability of nationally collected indicators on municipal and provincial level



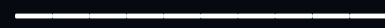
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TARGET POPULATION



Travelers and general population



Accommodation Providers



Tourism products



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TYPES OF SURVEYS



- Accommodation surveys
- Tourism intercept surveys
- Destination awareness & perceptions survey



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DEFINITIONS USED

- Based on the NDT and Stats SA definitions.



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DATA COLLECTION PROCESS & TOOLS USED



PROCESS & TOOLS USED

- Visitors
- Enquiries
- Ad hoc
- Accommodation establishment
- VICs
- Airports
- Attractions



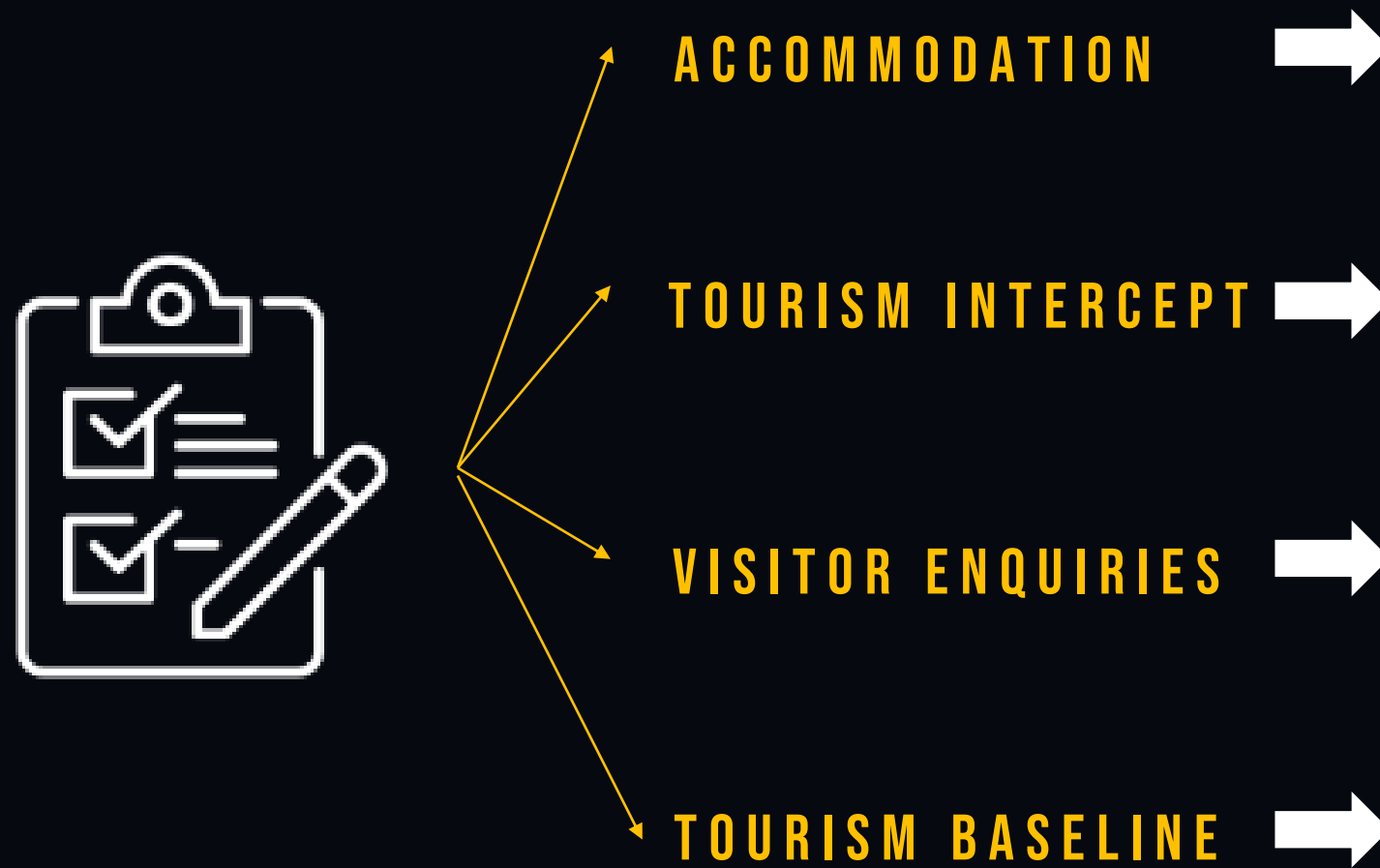
- Online surveys
- Physical surveys
- 3rd party statistics and data
- Other



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DATA CAPTURING, VALIDATION, CLEANING & ANALYSIS PROCESS



Tourism Portal-----Online / Excell-----Online & PDF



Google Forms ----- Google Data Studio

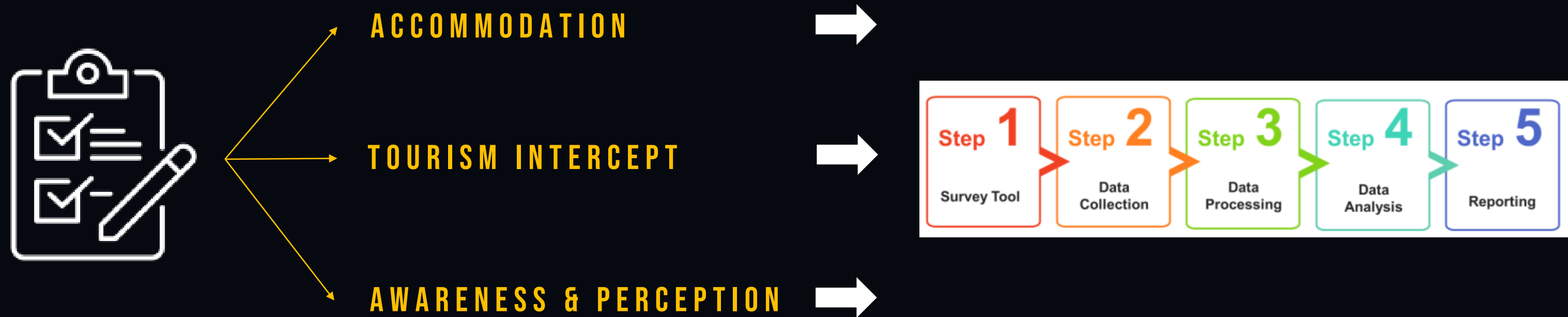
Indicators collected from various sources SAT /
STATSA / Subscriptions / Own Surveys and
Analyzed

Report
saved in
PDF



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DATA CAPTURING, VALIDATION, CLEANING & ANALYSIS PROCESS



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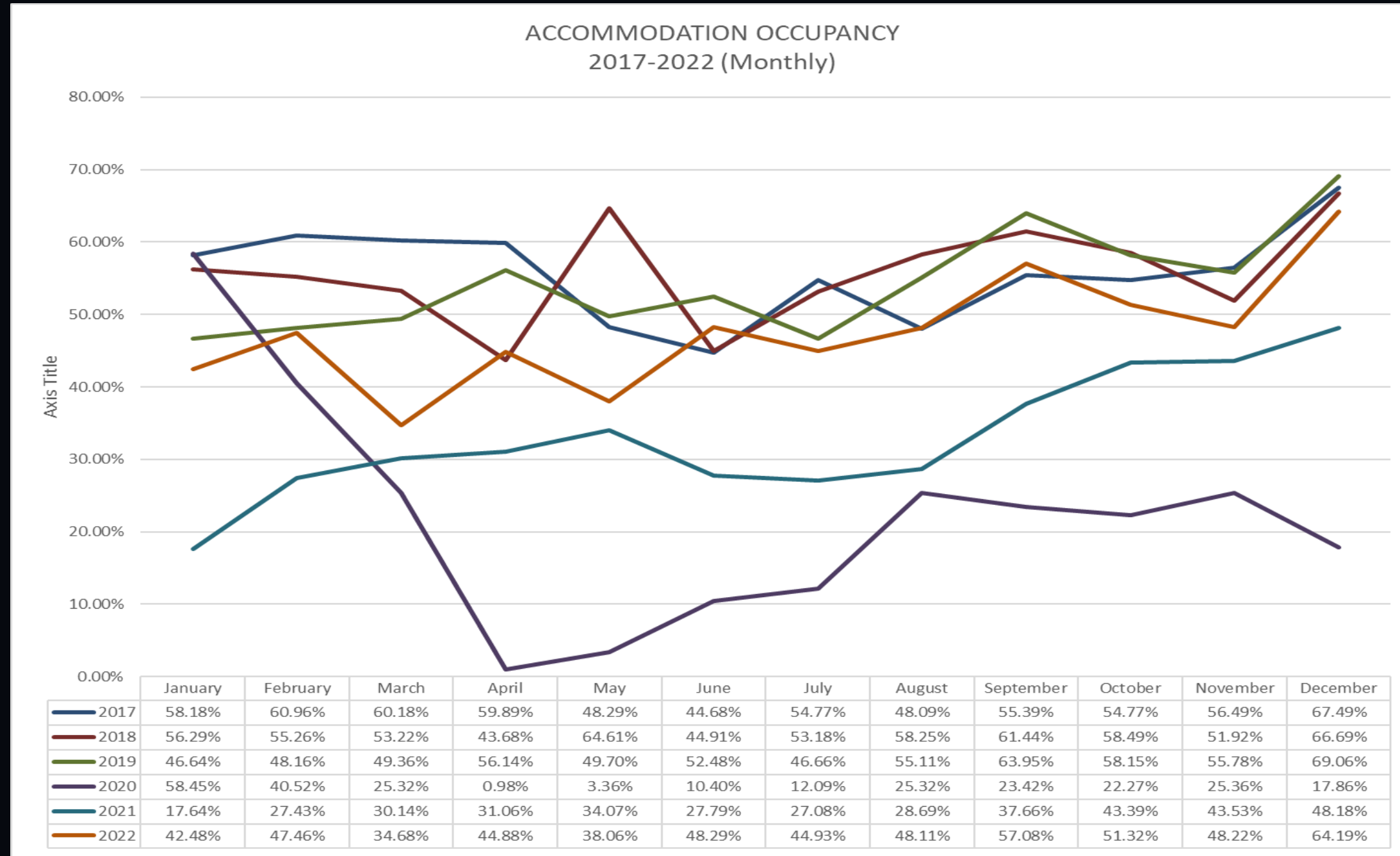
LATEST RESULTS PRODUCED

Nelson Mandela Bay Tourism Baseline	Units	2018	2019	2020	2021
Foreign Visitors (EC)	Pax	432,058	421,947	110,231	62,401
Foreign Visitors (NMB)	Pax	334,071	307,733	87,366	44,401
Increase %	%	4.0%	-7.9%	-71.6%	-49.2%
Foreign Bednights / Visitor Days	Bednights	1,514,731	728,998	238,882	241,830
- Foreign Bednights Paid		778,271	372,470	123,947	125,476
- Foreign Bednights VFR		736,459	356,527	114,935	116,354
- Average Bednights per Visitor (All)	Bednights	4.5	2.4	2.7	5.4
- Average Bednights per Visitor (Paid)	Bednights	2.3	1.2	1.4	2.8
Foreign Direct spend	Rand	1,058,091,336	606,961,157	199,537,503	189,307,137
- Average Spend per Visitor per day	Rand	699	833	835	783
Domestic Visitor Profile	Pax	2,420,321	4,266,384	1,122,158	1,258,558
Increase %		-0.2%	76.3%	-73.7%	12.2%
Staying in Formal Accommodation	Pax	627,808	847,829	338,138	448,872
VFR Overnight Visitors	Pax	1,093,062	1,954,911	371,924	379,229
Day Visitors to NMB	Pax	699,451	1,463,644	412,096	430,456
Domestic Bednights / Visitor Days	Bednights	6,761,592	9,308,135	2,367,561	2,856,823
- Domestic Bednights Paid	Bednights	2,466,765	2,815,711	1,127,452	1,548,541
- Domestic Bednights VFR	Bednights	4,294,828	6,492,424	1,240,108	1,308,283
Average Spend per Visitor / Per Day	Rand	536	718	872	1,055
Domestic Direct spend Overall	Rand	3,998,337,385	7,728,933,071	2,422,763,218	3,467,569,884
Overall Direct Spend	Rand	5,056,428,720	8,335,894,228	2,622,300,721	3,656,877,021



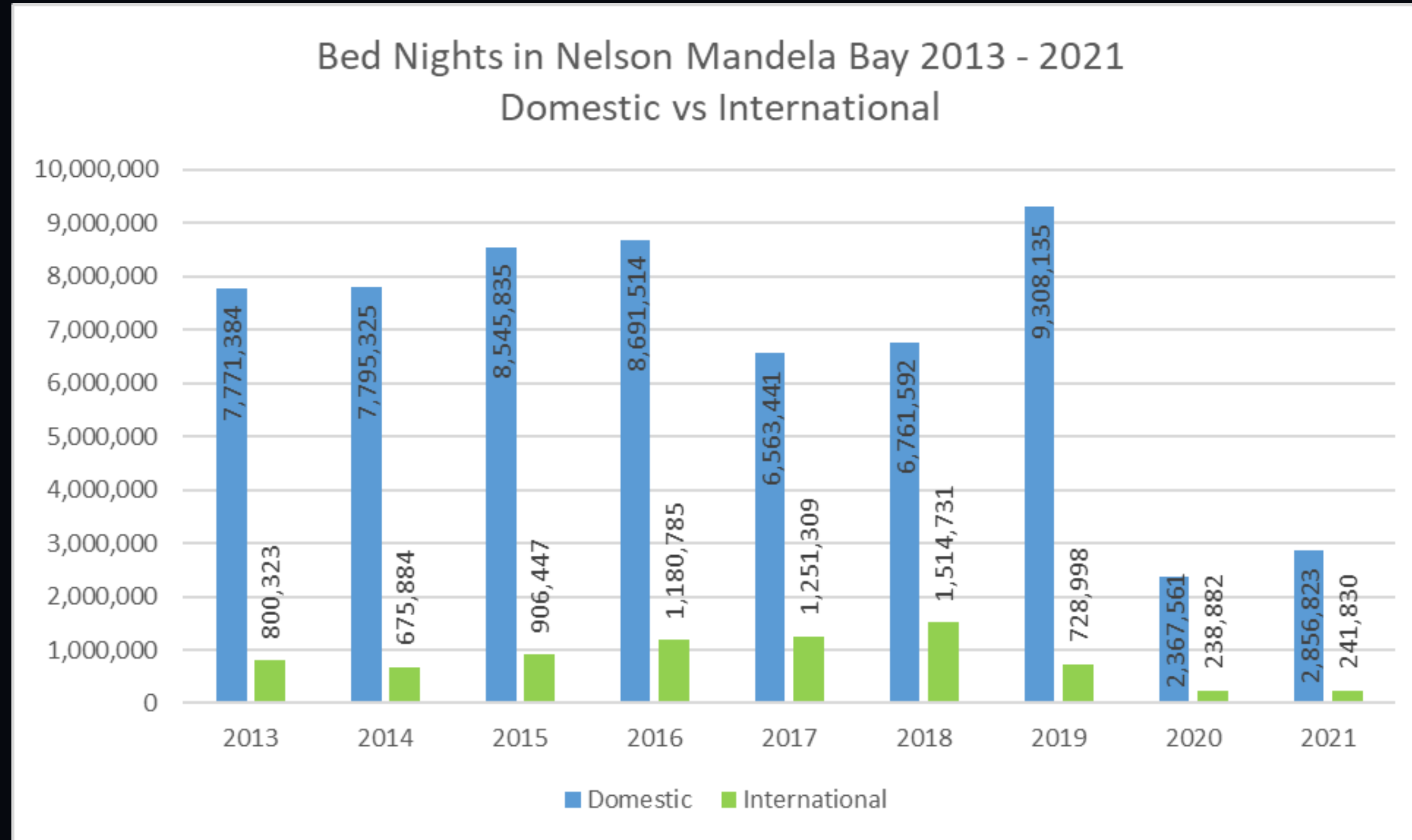
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LATEST RESULTS PRODUCED



Yours to Explore

LATEST RESULTS PRODUCED

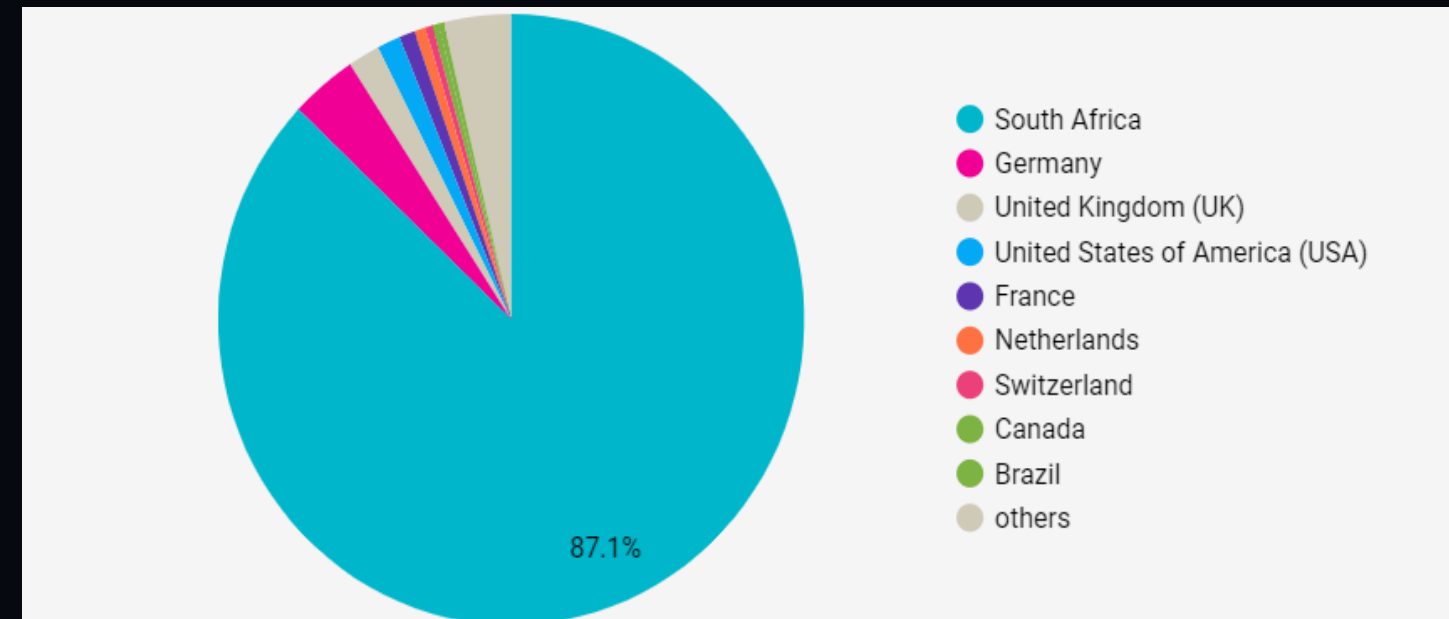
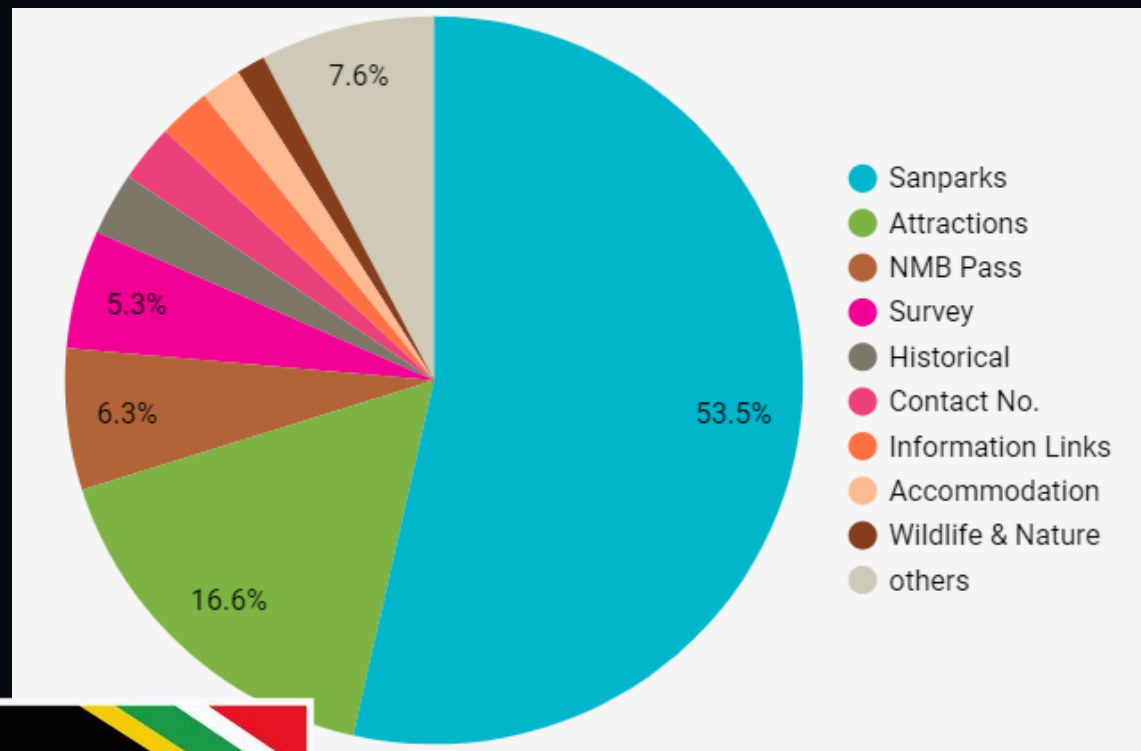


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LATEST RESULTS PRODUCED

Type of Enquiry	Enquiries	% Δ
Telephone Call	2,472	59.3% ↑
Walk In	1,402	406.1% ↑
E-mail/Online	637	1,079.6% ↑
Grand total	4,511	139.6% ↑



Country From	Enquiries	%	Province From	Enquiries	%
1. South Africa	3,930	87.1%	1. Eastern Cape	2,556	65.0%
2. Germany	165	3.7%	2. Gauteng	351	8.9%
3. United Kingdom (UK)	79	1.8%	3. Western Cape	639	16.3%
4. United States of Ameri...	58	1.3%	4. KwaZulu-Natal	96	2.4%
5. France	39	0.9%	5. Free State	82	2.1%
6. Netherlands	28	0.6%	6. Limpopo	44	1.1%
7. Switzerland	18	0.4%	7. North West	39	1.0%
8. Canada	16	0.4%	8. Northern Cape	76	1.9%



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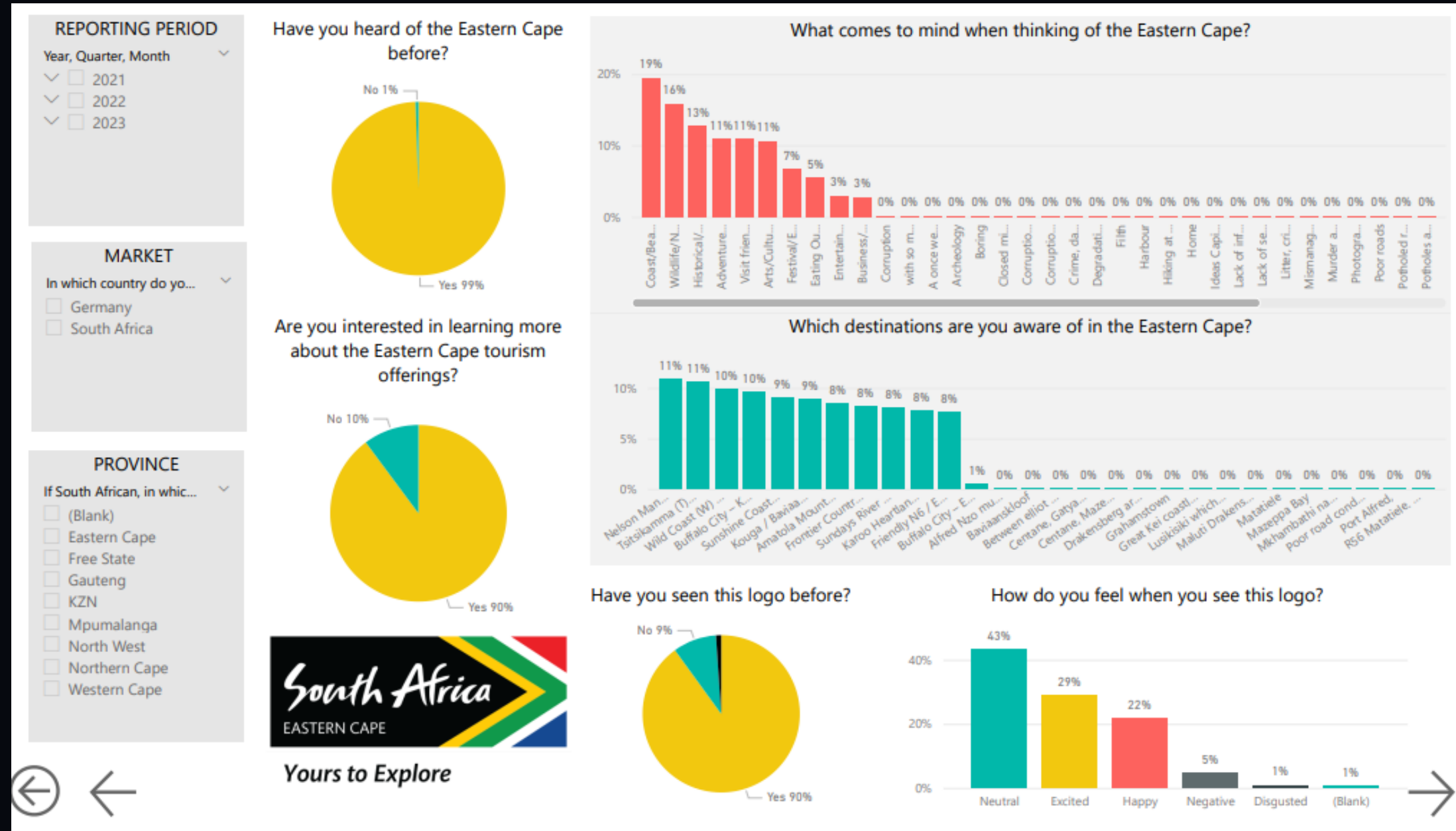
LATEST RESULTS PRODUCED



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LATEST RESULTS PRODUCED



Yours to Explore

LATEST RESULTS PRODUCED

REPORTING PERIOD
Year, Quarter, Month

- 2021
- 2022
- 2023

MARKET
In which country do yo...

- Germany
- South Africa

PROVINCE
If South African, in whic...

- (Blank)
- Eastern Cape
- Free State
- Gauteng
- KZN
- Mpumalanga
- North West
- Northern Cape
- Western Cape

Have you visited the Eastern Cape before?

No 1%
Yes 99%

Why have you not visited the Eastern Cape yet?

Will you consider travelling to the Eastern Cape in the future?

No 5%
Yes 95%

Which activities do you participate in when visiting the Eastern Cape?

Activity	Percentage
Coast/Beach...	18%
Wildlife/Nature	14%
Visit Friends/Family	14%
Eating Out/Restaurant	10%
Historical/Heritage	9%
Adventure/Sports	8%
Arts/Culture	7%
Entertainment/Shopping	7%
Business/Conference	6%
Adventure/Sport	4%
Business/Culture	1%
I live here	1%
Tourism attractions	1%
Holidays	0%
Inspections	0%
Live here	0%
Looking for employment	0%
Photography	0%
Resident	0%
Scenery	0%
School I studied there	0%
We live in PE	0%
Work and school	0%

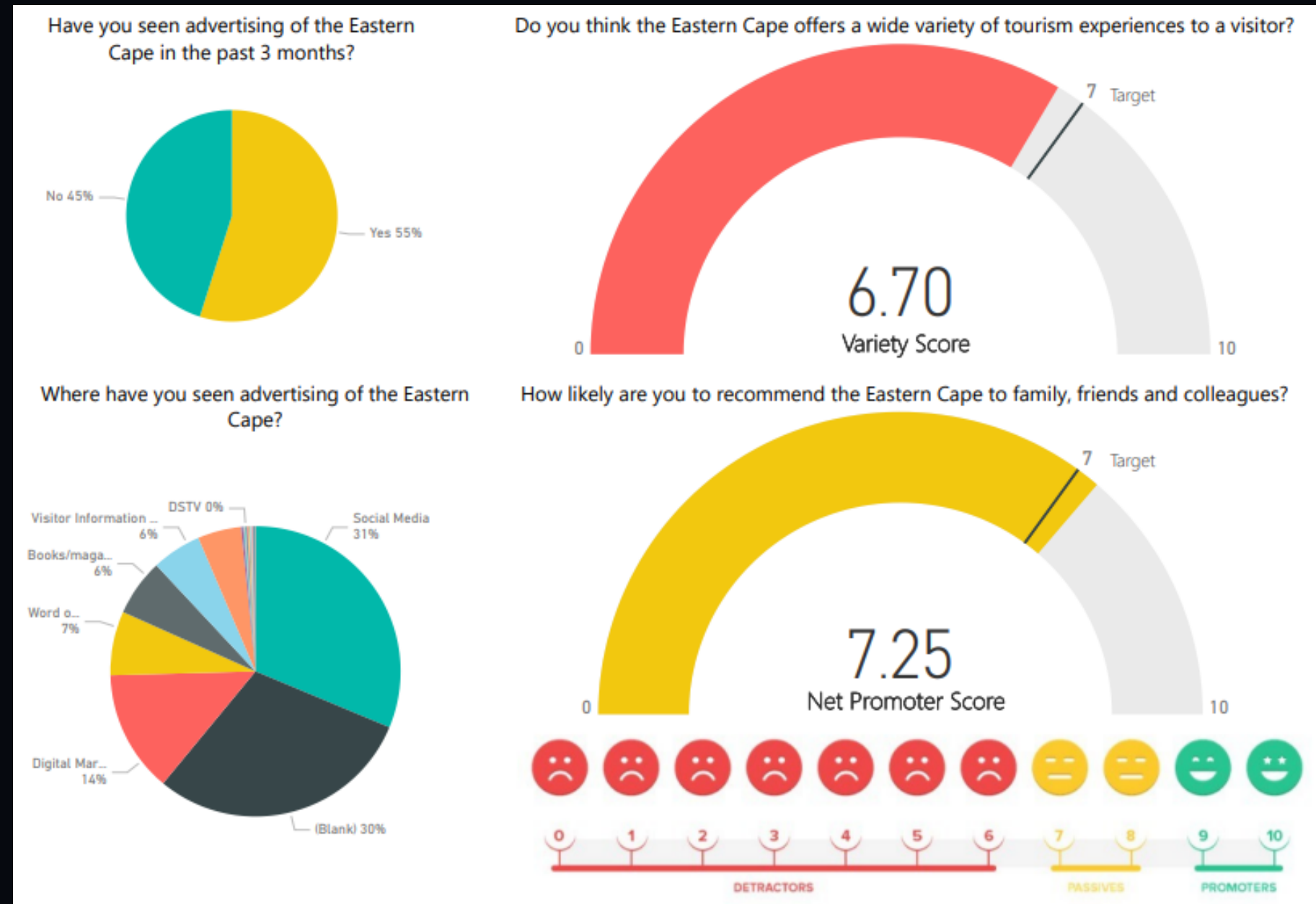
Why won't you consider the Eastern Cape as a travel destination in the future?



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LATEST RESULTS PRODUCED



Yours to Explore

STAKEHOLDER ENGAGEMENT & SHARING OF INFORMATION

- Share information on research and trends on various platforms
- Physical stakeholder engagements, workshops and industry platforms
- Online platforms e.g. website and e-newsletters



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EASTERN CAPE REPRESENTATION



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THANK YOU

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