



## Western Cape Regional Trends

**WESGRO**  
cape town & western cape  
research

January - December 2021

An inspiring place to know

# Contents

1. Methodology
2. Participation and sample size
3. Western Cape Visitor Trends & Patterns
  - 3.1 Origin of visitors
  - 3.2 Age profile of visitors
  - 3.3 Travel group size
  - 3.4 Mode of transport
  - 3.5 Main purpose of visit
  - 3.6 Top activities undertaken in the Western Cape
  - 3.7 Overnight vs. Day Visitors
  - 3.8 Length of stay
  - 3.9 Accommodation usage
  - 3.10 Average daily spend
  - 3.11 Top Information Sources
4. Tourism Sentiment in the Western Cape (TSI)
5. Acknowledgements

# Executive Summary

- The regional spread of visitors across the Western Cape reflected a share of 20,4% from the overseas and 79,5% from the domestic market.
- Top international markets; Germany (64,8%), United Kingdom (7,9%), Netherlands (3,9%), France (3,3%) and the United States (3,2%) continued to travel to the Western Cape; however, at a much smaller scale due to strict outbound travel regulations.
- In spite of the sudden halt in tourism activity since April 2020, visitor trends indicate that the majority of domestic travellers originated from the Western Cape (84,6%); confirming that locals mainly travelled within their own province. An additional 5,9% of domestic visitors originated from Gauteng.
- Scenic drives (17,1%), outdoor activities (15,6%) and cuisine (13,8%) ranked as the top three activities enjoyed in the Western Cape. Visitors were mainly between the age groups of 36-50 and 51-70 years.
- 35,9% of visitors travelled to the Western Cape on their own while 41,5% travelled in pairs. Own motor vehicles (74,2%) ranked as the top transport choice amongst visitors, followed by rented cars (11,0%) and public transport (2,6%).
- Nearly 40,0% of respondents indicated overnight stays in the province, while 51,0% were day visitors. Visitors stayed on average one or two nights in the respective regions and 17,1% indicated stays of up to a week or more.
- The **Tourism Sentiment Score®** provides a comprehensive look at how destinations are driving positive perceptions about their tourism offerings through online content. Between January and December 2021, the Western Cape's Tourism Sentiment score is considered average at 25.
- 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.
- Tourism Sentiment in the Western Cape was largely driven by positive conversations around beaches and restaurants/dining/takeaway, while the negative sentiments revolved around natural disasters and accommodation.
- The most talked about sentiment categories for the Western Cape included beaches, wildlife viewing and winery + vineyards, while the most appealing categories were beaches, restaurants/dining/takeaway and winery + vineyards.



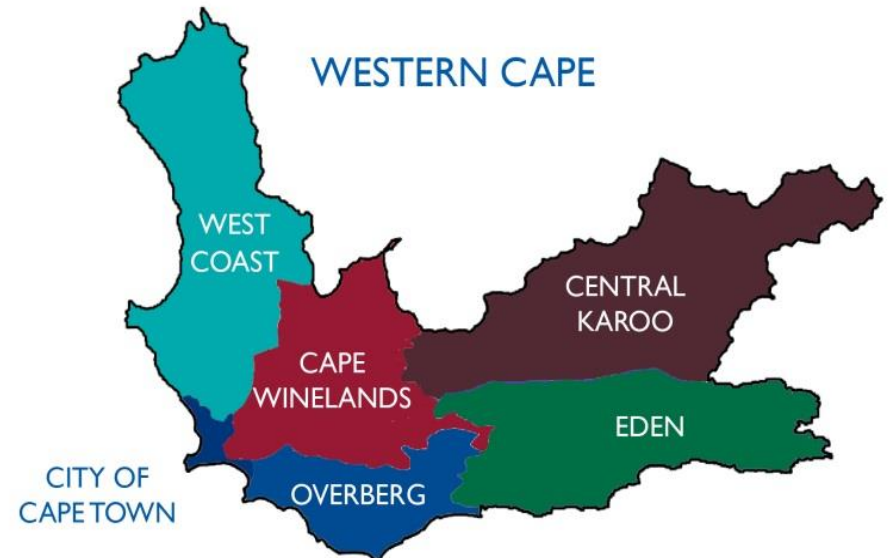
# 1. Methodology

- 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 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

From January to December 2021, a total of **5,666** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. The participating regions were:

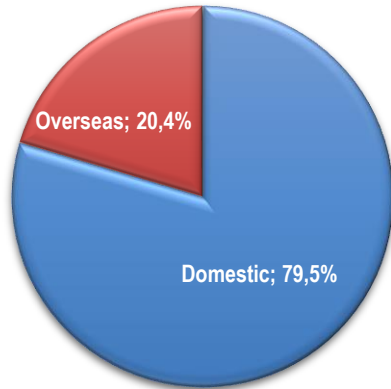
Region	Number of Surveys
Garden Route	332
Overberg	2 506
Weskus	1 729
Winelands	1 099



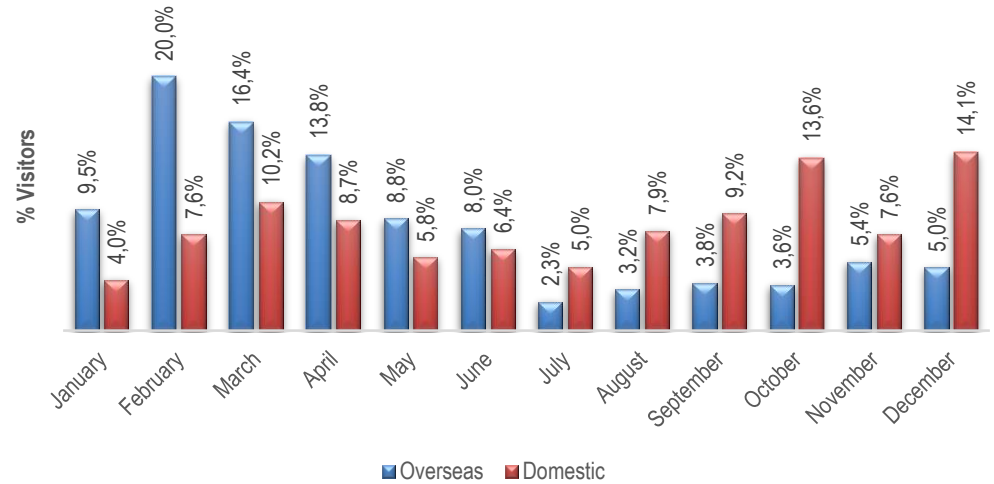
# 3. Western Cape Visitor Trends & Patterns

## 3.1 Origin of Visitors

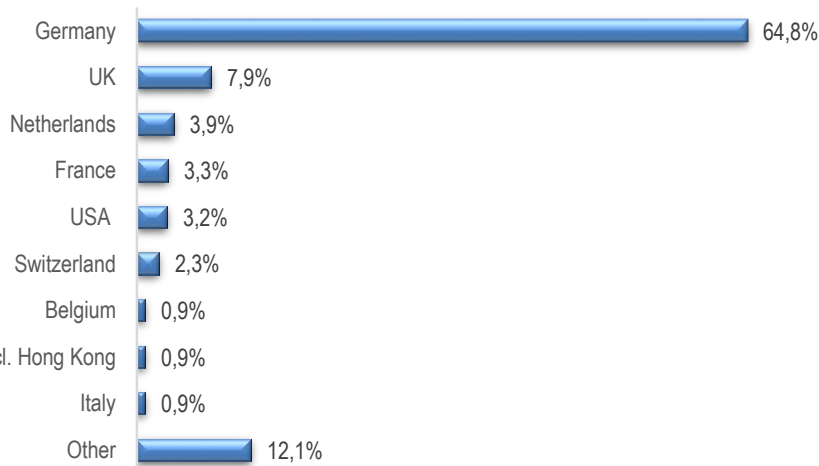
% SHARE OVERSEAS AND DOMESTIC VISITORS TO THE WESTERN CAPE, JAN-DEC 2021



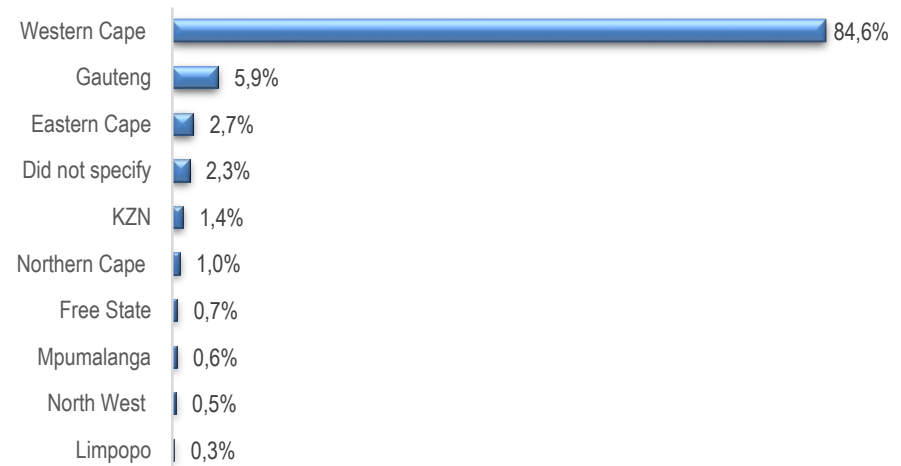
VISITOR MOVEMENT ACROSS THE WESTERN CAPE BY MONTH, JAN-DEC 2021



TOP INTERNATIONAL MARKETS TO THE WESTERN CAPE, JAN-DEC 2021

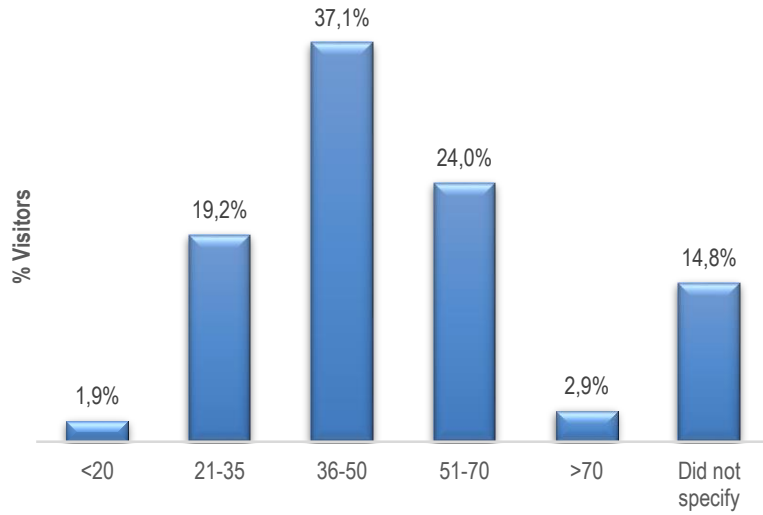


% DOMESTIC VISITORS TO THE WESTERN CAPE, JAN-DEC 2021



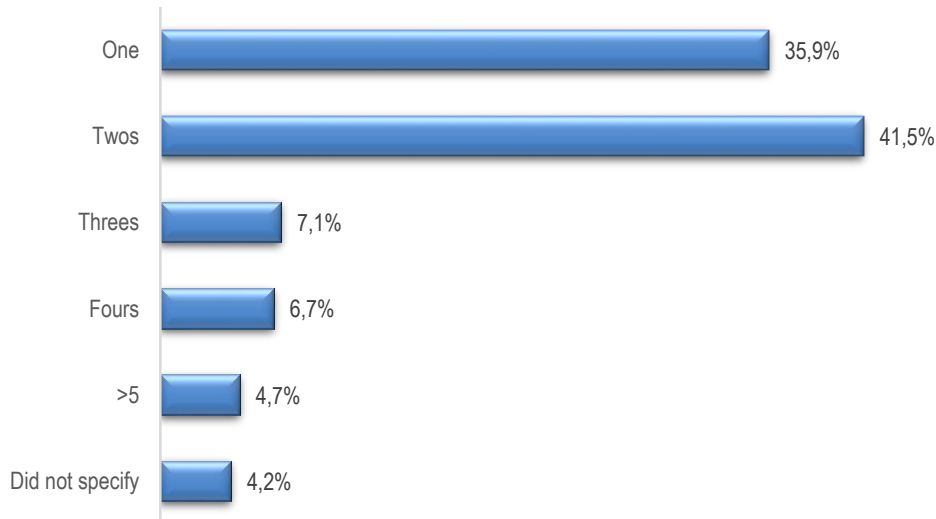
# 3. Western Cape Trends and Patterns

## 3.2 Age Profile of Visitors

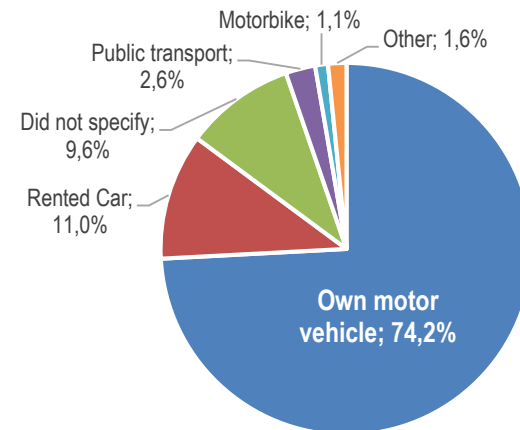


- The age groups 36-50 and 51-70 years emerged as the most common amongst visitors to the Western Cape. 21-35 years followed as the third largest share of respondents.
- Travelling in pairs (41,5%) ranked as the most prominent travel group size, followed by 35,9% who travelled alone.
- Own motor vehicles (74,2%) ranked as the top transport choice amongst visitors, followed by rented cars (11,0%) and public transport (2,6%). Close to 10% of respondents did not indicate their mode of transport.

## 3.3 Travel Group Size



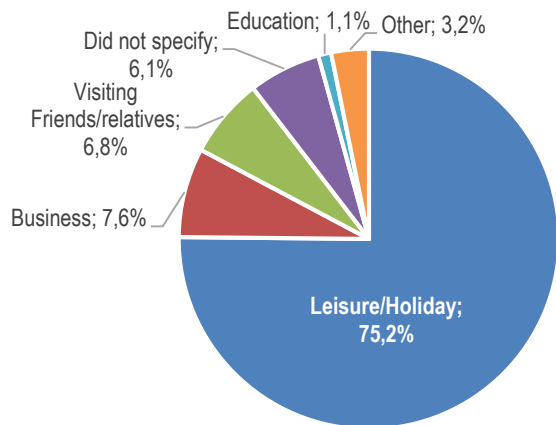
## 3.4 Mode of Transport



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

### 3. Western Cape Trends and Patterns

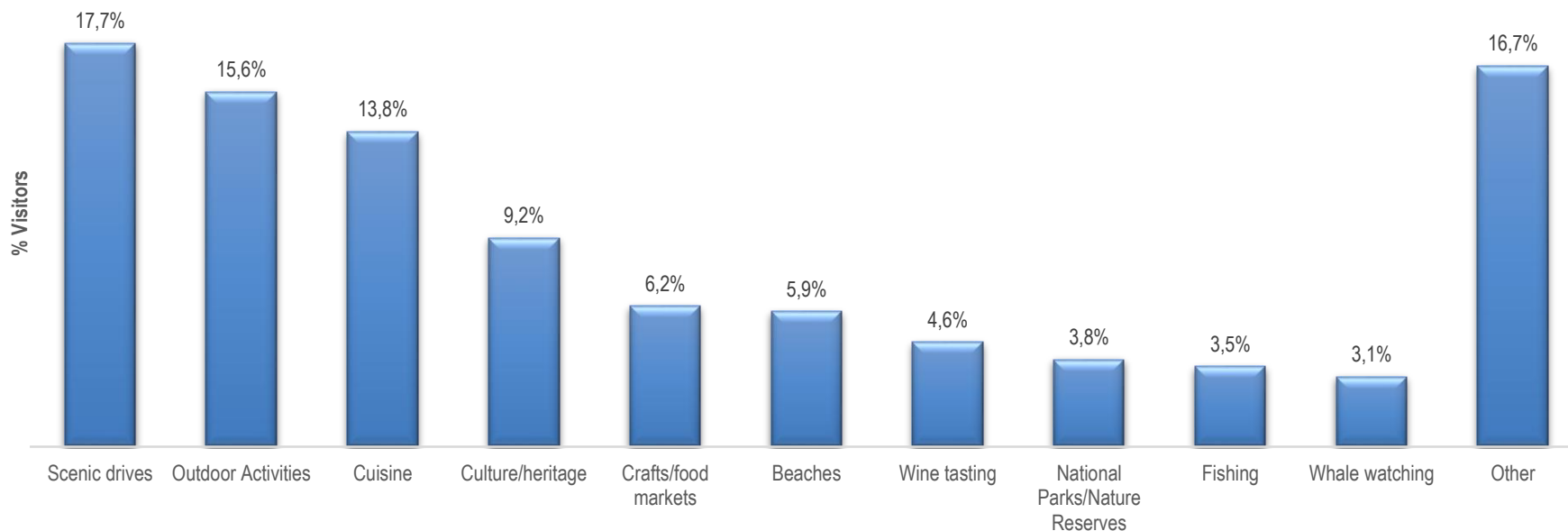
#### 3.5 Main purpose of visit



- Holiday/leisure (75,2%) led as the top reason for travel to the province, followed by business travel (7,6%) and visiting friends/relatives (6,8%).
- Scenic drives (17,7%), outdoor activities (15,6%) and cuisine (13,8%) ranked as the top three activities enjoyed by visitors to the Western Cape.
- Culture/heritage has recently also emerged as a priority niche tourism market for the province. The launch of the Cradle of Human Culture Route resulted in the development of three anchor sites in the Western Cape.

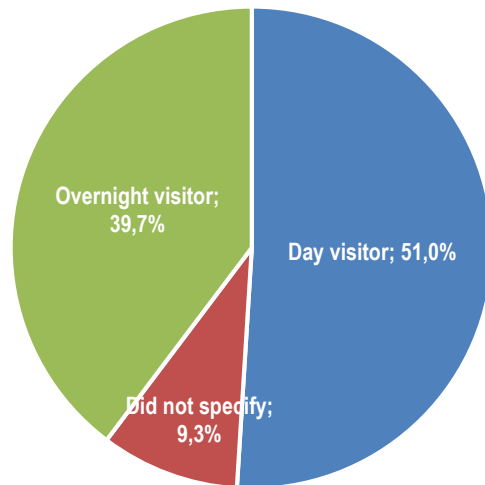
\*Other: Includes travel for events/festivals, medical/health (spa, surgery, wellness), honeymoon/weddings, religion, sport and seasonal/migrant worker.

#### 3.6 Top activities undertaken in the Western Cape



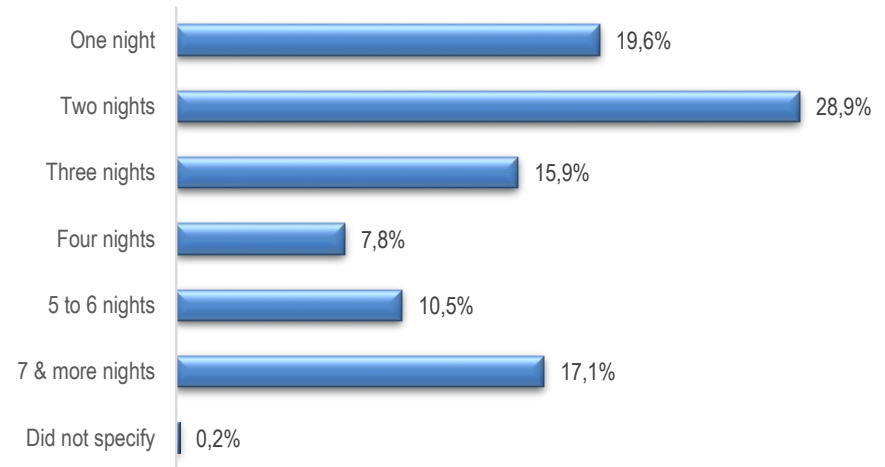
### 3. Western Cape Trends and Patterns

#### 3.7 Overnight vs. Day Visitors

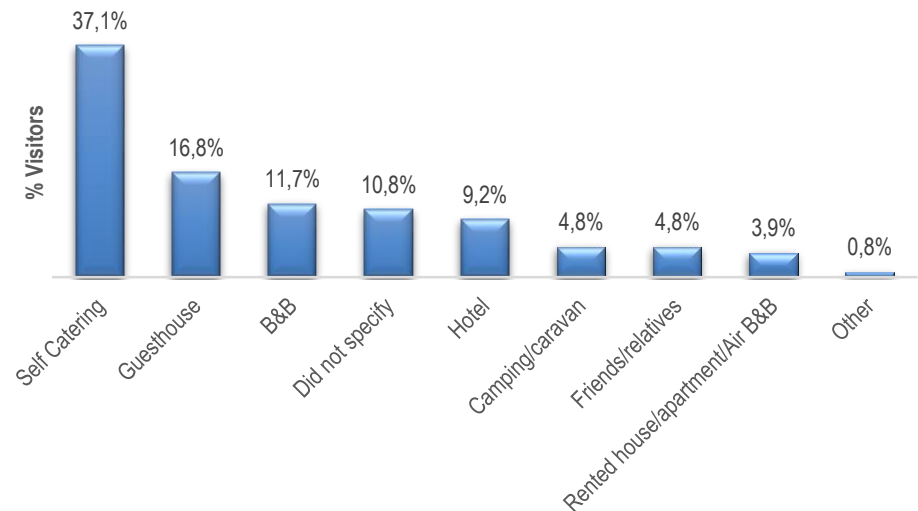


- Between January and December 2021, 39,7% of respondents indicated overnight stays in the province, while a share of 51,0% were day visitors. over the period under review, visitors stayed on average one, two and three nights in the Western Cape.
- This trend underlines the Western Cape's popularity in weekend getaways. Extended holidays of up to a week and more ranked as the 3<sup>rd</sup> most prominent length of stay among visitors (17,1%).
- 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 10,8% did not indicate their type of accommodation in the survey.

#### 3.8 Average length of stay



#### 3.9 Accommodation Usage



\*Other: Includes timeshare, backpackers and university hostels.



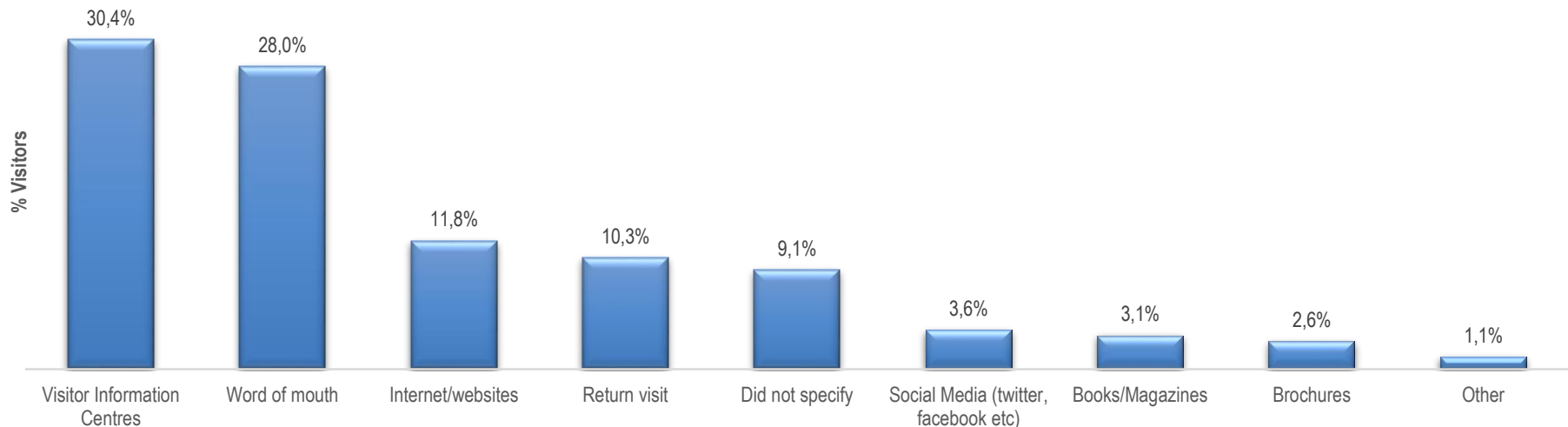
## 3. Western Cape Trends and Patterns

### 3.10 Average daily spend



- Tourism is one of the Western Cape's strongest economic drivers. On average, visitors spent between 0-R200 (26,2%) per day in the Western Cape. R501-R1000 (20,4%) followed as the second most common expenditure range, and 17,7% of respondents spent on average R201-R500 per day.
- 12,5% of respondents did not indicate their average daily spend in the Western Cape.
- Visitor Information Centres (30,4%) and word of mouth (28,0%) ranked as the top sources for obtaining information on the province.
- Internet/websites (11,8%) accounted for the 3<sup>rd</sup> largest share of respondents and 10,3% were return visitors, a finding which indicates much success in the tourism sector's marketing efforts.

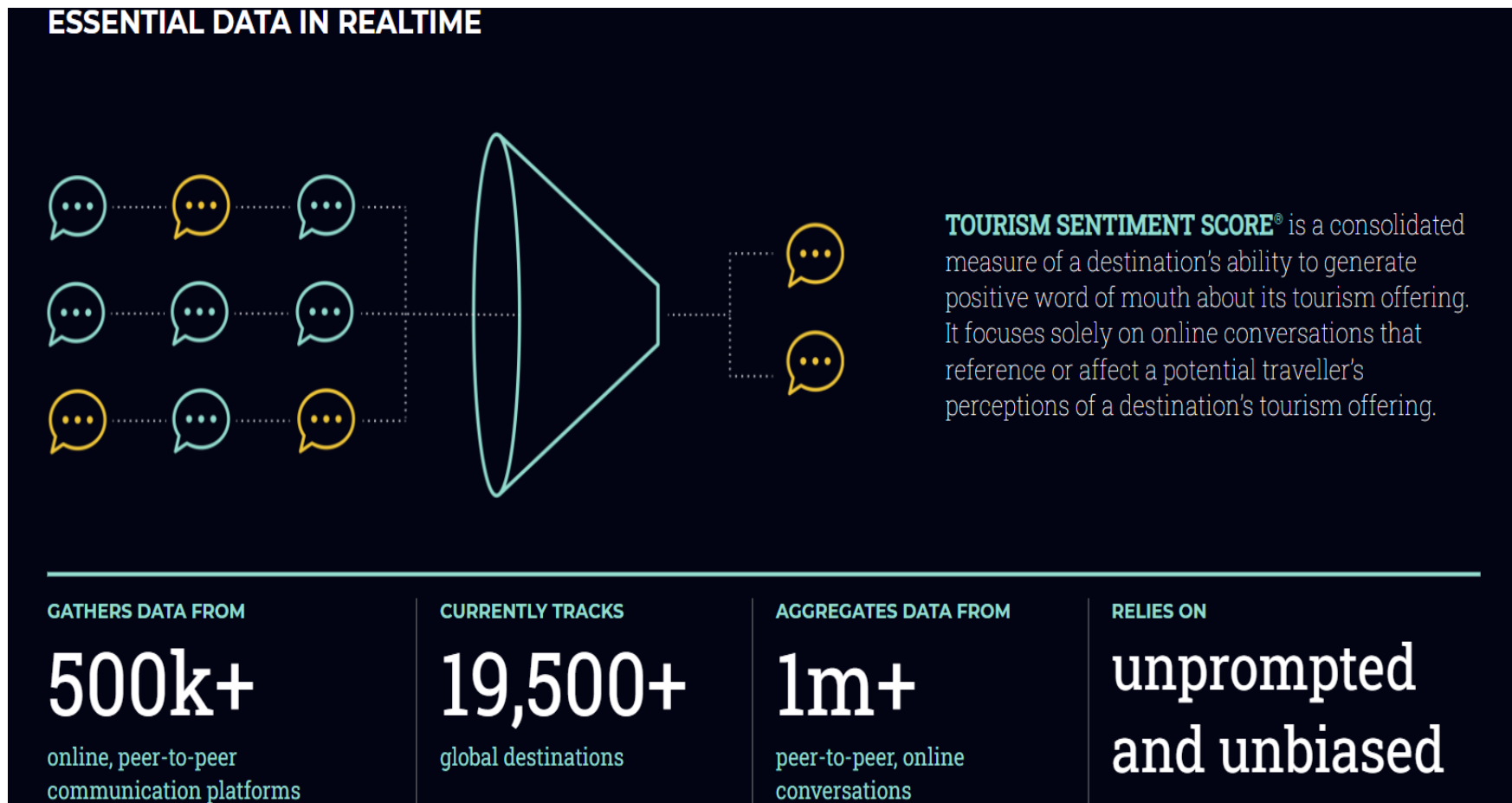
### 3.11 Top Information Sources



\*Other: Includes Travel Agent/Tour Operator, Newspapers and TV/Media/Radio.

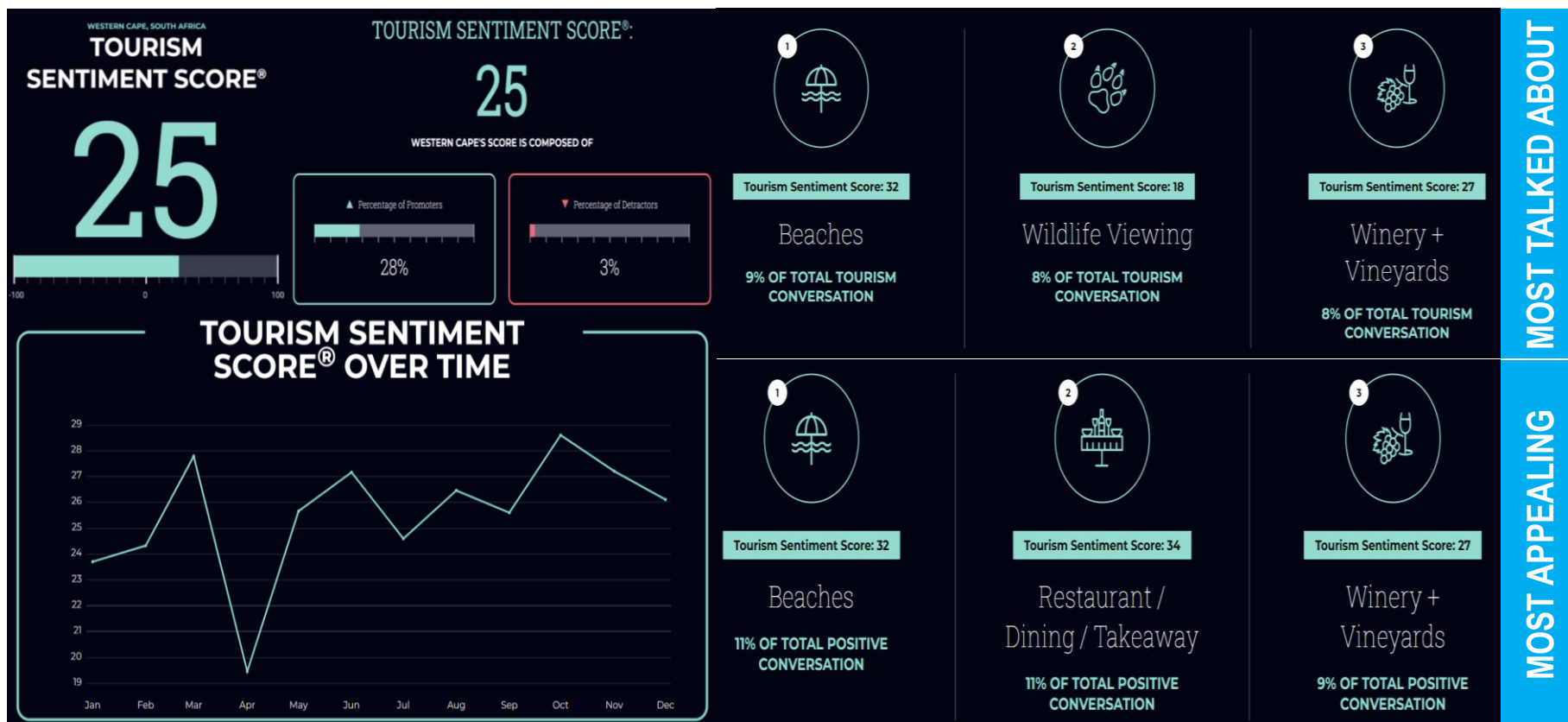
## 4. Tourism Sentiment in the Western Cape

- 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.



## 4. Tourism Sentiment in the Western Cape

- The Western Cape's Tourism Sentiment score is considered average at 25, 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 December 2021, the Tourism Sentiment in the Western Cape was driven by positive conversations around beaches and restaurants/dining/takeaway, while the negative sentiments revolved around safety and accommodation.
- The most talked about sentiment categories for the Western Cape included beaches, wildlife viewing and winery + vineyards, while the most appealing categories were beaches, restaurants/dining/takeaway and winery + vineyards.



## 4. Tourism Sentiment in the Western Cape

- The biggest volume of conversations was around **outdoor activities**.
- Highest sentiment was driven by **Amenities + Entertainment** (32). The leading volume of conversations around this category was about **festivals + events + concerts**. **Attractions** and **Nightlife** drove the highest sentiment under this category.
- High sentiment was also in **Relaxation and Wellness** (31).
- Spa and Wellness** (37), though smaller in volume, had a particularly high sentiment.
- Safety** drove the lowest sentiment (-11).

		WESTERN CAPE		
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment
▲ Outdoor Activities		32% ▲ 0%	Joy	<b>24</b> Average
▲ Food + Culinary		17% ▲ 1%	Joy	<b>30</b> Average
▲ Relaxation + Wellness		11% ▼ 1%	Joy	<b>31</b> Average
▲ Destination Services		9% ▼ 1%	Joy	<b>29</b> Average
▲ Amenities + Entertainment		9% ▲ 0%	Joy	<b>32</b> Average
▲ Access + Transportation		8% ▲ 1%	Joy	<b>11</b> Average
▲ Safety		7% ▲ 0%	Sadness	<b>-11</b> Average
▲ Culture + History		7% ▲ 0%	Joy	<b>23</b> Average

## 5. 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 Overberg*

*Weskus and*

*Cape Winelands*

*Tourism Sentiment Index (TSI)*

*Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or warranty whatsoever, whether expressed or implied. It is the responsibility of users of this publication to satisfy themselves of the accuracy of information contained herein. Wesgro cannot be held responsible for the contents of the publication in any way.*

© Wesgro, 2022.