



Tourism Niche Study: Culture & Heritage

2019

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1. Methodology

This report provides an overview of the tourism trends and patterns amongst visitors who engaged in culture & heritage activities throughout 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

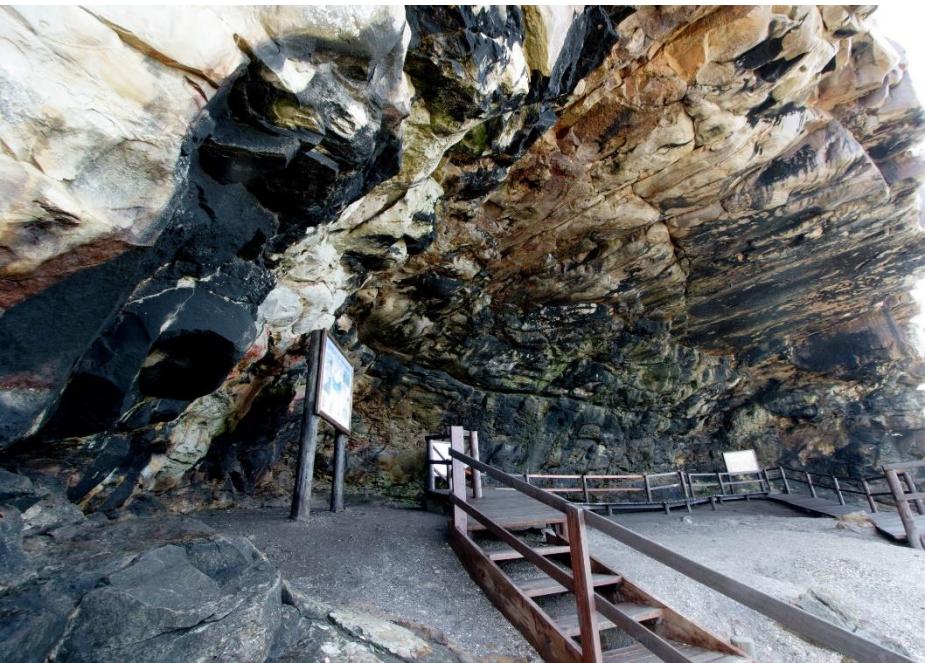
In 2018, a total of **23,307** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. Close to 20% of these respondents listed culture/heritage as an in-destination activity. This report focuses on the **4570** respondents who engaged in culture/heritage activities from the following participating regions:

Cape Garden Route	683
Cape Karoo	710
Cape Overberg	341
Cape Town	171
Weskus	1543
Winelands	1122



3. Overview of Culture & Heritage Tourism

- The growth of cultural tourism as an economic force is undeniable. Tourists looking for unique and authentic experiences are increasingly interested in cultural sites and innovative arts programming, and travel to find these attractions (Creative City Network of Canada, 2009).
- Culture according to the White Paper on Arts, Culture and Heritage (South Africa, 1996a) by the Department of Arts, Culture, Science and Technology is the dynamic totality of distinctive spiritual, material, intellectual and emotional features which characterise a society or social group. It includes the arts and letters, but also modes of life, the fundamental rights of the human being, value systems, traditions, heritage and beliefs developed over time and subject to change.
- An earlier definition of cultural tourism described in the White Paper on Development and Promotion of Tourism (South Africa, 1996b:v) by the Department of Environmental Affairs and Tourism (DEAT) includes cultural aspects which are of interest to the visitor and can be marketed as such. These include customs and traditions of people, their heritage, history and way of life. The definition of cultural tourism in the 2006 White Paper on Tourism is expanded to include culture, heritage and the physical environment.
- It is described as that activity, which enables people to experience the different ways of life of other people, thereby gaining at first hand an understanding of their customs, traditions, the physical environment, the intellectual ideas and those places of architectural, historic, archaeological or other cultural significance which remain from earlier times.
- The UNWTO (1985) defines cultural tourism from two different approaches. The narrow definition includes movement of persons essentially for cultural motivations such as study tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages.

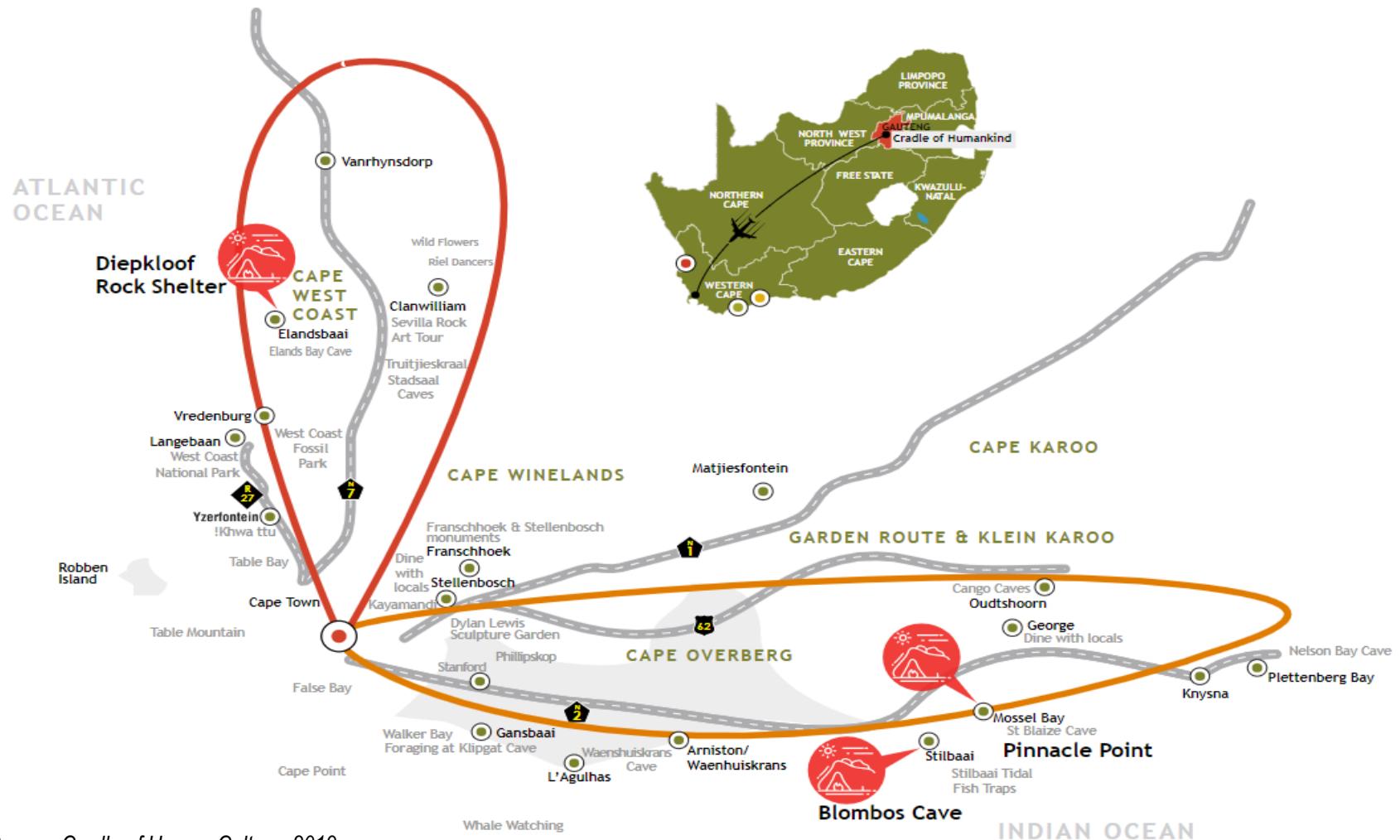


3. Overview of Culture & Heritage Tourism

- The International Council on Monuments and Sites (ICOMOS) Article 3 of the Charter of 1976 defines cultural tourism as that form of tourism whose object is, among other aims, the discovery of monuments and site. It exerts on these a very positive effect insofar as it contributes – to satisfy its own ends – to their maintenance and protection. This form of tourism justifies in fact the efforts which maintenance and protection demand of the human community because of the social cultural and economic benefits that they bestow on all the populations concerned (Ivanovic, 2008).
- Some of the cultural tourism categories have been outlined as heritage tourism, arts tourism, urban cultural tourism, rural cultural tourism, indigenous cultural tourism, and contemporary (popular) cultural tourism.
- The International Council on Monuments and Sitesthrough the 8th Draft of International Cultural Tourism Charter on Managing Tourism at places of Heritage Significance (1999) indicated that there is a dynamic interaction between tourism and cultural heritage.
- It highlights the importance of sustainable tourism practices and the need for the protection and conservation of culture and heritage for future generations.
- The Charter (ICOMOS, 1999) adopted six principles that aim to address the specific circumstances or the requirements of particular organisations and communities pertaining to culture and heritage:
 - Principle 1: Since domestic and international tourism is among the foremost vehicles for cultural exchange, conservation should provide responsible and well managed opportunities for members of the host community and visitors to experience and understand that community's heritage and culture first hand.
 - Principle 2: The relationship between heritage places and tourism is dynamic and may involve conflicting values. It should be managed in a sustainable way for present and future generations.
 - Principle 3: Conservation and tourism planning for heritage places should ensure that the visitor's experience will be worthwhile, satisfying and enjoyable.
 - Principle 4: Host communities and indigenous peoples should be involved in planning for conservation and tourism.
 - Principle 5: Tourism and conservation activities should benefit the host community.
 - Principle 6: Tourism promotion programmes should protect and enhance natural and cultural heritage characteristics.

3. Overview of Culture & Heritage Tourism

- After discovering the earliest origins of humans at the Cradle of Humankind in the north of South Africa, visitors are encouraged to travel south to the Western Cape and find out how tradition and symbolism, human behaviour and technology continued to evolve near the southern tip of Africa over the past 100 000 years.
- If the Cradle of Humankind delves into where we came from, the Cradle of Human Culture, which consists of two main routes, reflects on how we became what we are today.



Source: Cradle of Human Culture, 2019

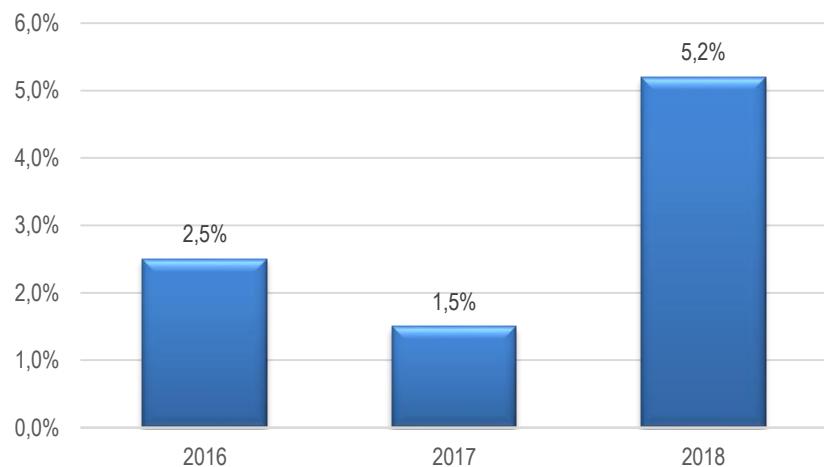


Culture & Heritage Visitor Trends Analysis

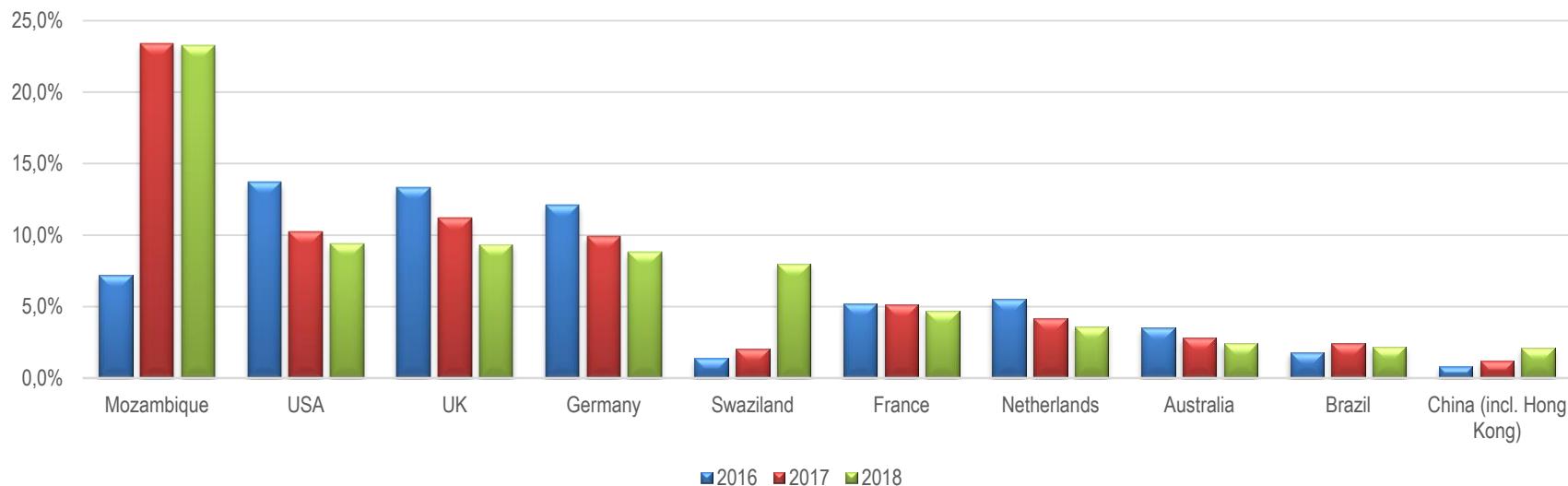
4.1 Culture & Heritage Activities in South Africa

- European countries dominate the list when it comes to experiencing culture & heritage activities in South Africa. However, African countries such as Mozambique and Swaziland have shown a significant increase in culture & heritage activities since 2016.
- Leading source markets, USA, UK, and Germany, still holds substantial interest in culture & heritage activities in South Africa.
- On the domestic front, 2018 saw a massive increase in domestic visitors engaging in culture and heritage activities throughout South Africa.
- After a decline in 2017, domestic visitors opting to engage in culture & heritage activities more than tripled going from 1,5% in 2017 to 5,2% in 2018.

DOMESTIC TOURISTS WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES IN SOUTH AFRICA, 2016 - 2018



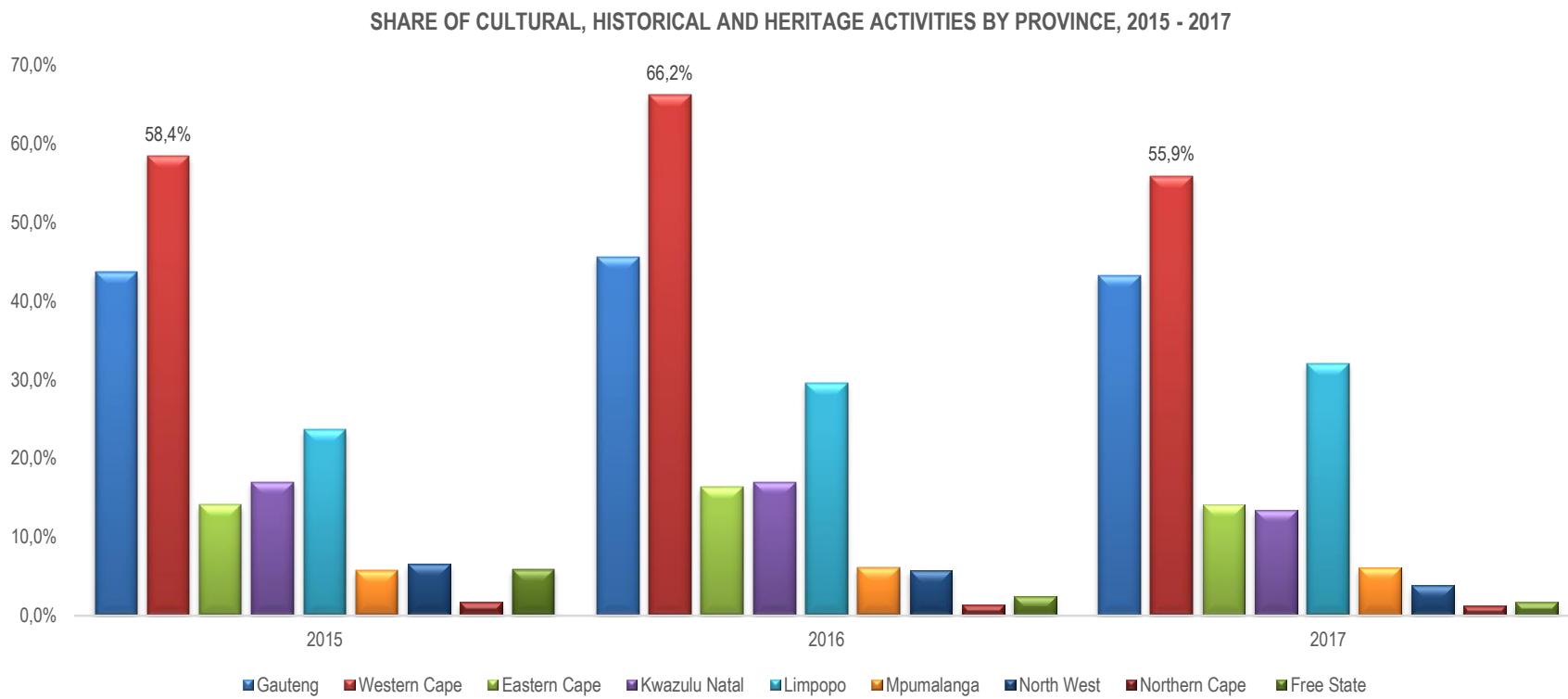
TOP COUNTRIES TO EMBARK ON CULTURE & HERITAGE ACTIVITIES IN SOUTH AFRICA, 2016 - 2018



Source: South African Tourism, 2018

4.2 Culture & Heritage Activities by Province

- The growth of cultural tourism as an economic force is undeniable. Tourists looking for unique and authentic experiences are increasingly interested in cultural sites and innovative arts, and travel to find these attractions.
- By province, the Western Cape consecutively held the strongest share of tourist arrivals who indicated Cultural/Historical/Heritage activities as one of their top activities of choice. As reflected in the figure below, the Western Cape ranked as the top province for cultural activities, and experienced solid growth in the share of tourists recorded in 2016, increasing from 58.4% in 2015 to 66.2% in 2016.
- In addition Robben Island, located near Cape Town has been the top Culture & Heritage Attraction in South Africa throughout the period 2015 to 2017.

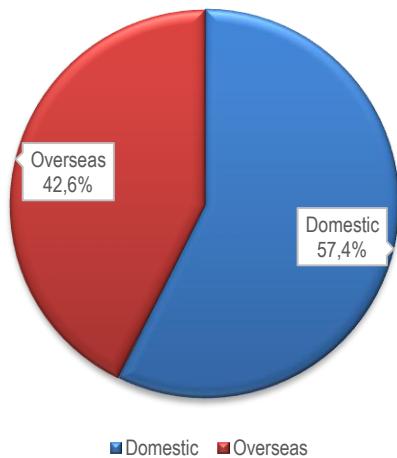


Source: South African Tourism, 2018

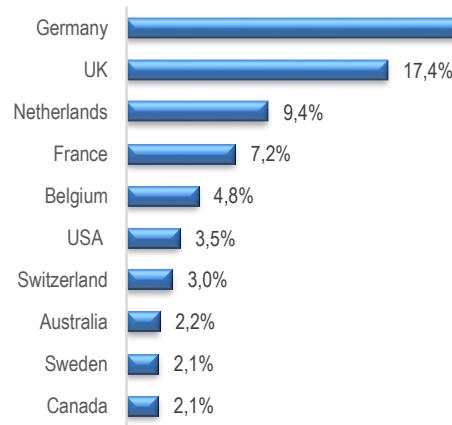
4.3 Culture & Heritage Activities in the Western Cape

- The strength of domestic visitors engaging in culture & heritage activities is evident in the Western Cape, with 57,4% of survey respondents who engaged in culture & heritage activities originating from the domestic market and 42,6% coming from international markets.
- Europe continues to dominate in culture & heritage activity in the Western Cape with 7 out of the top 10 international markets who enjoyed culture/heritage activities in the Western Cape originating from the continent.
- The Western Cape's top North American markets; United States and Canada also ranked in the top 10 markets who enjoyed cultural activities in the province.
- From the domestic market, the Western Cape (55.7%), Gauteng (17.6%) and KwaZulu-Natal (5.5%) ranked as the top three provinces who embarked on culture/heritage activities in the province.
- The high number of Western Cape locals engaging in culture/heritage activities within their province indicates that local tourism also remains a very important market for the tourism sector, particularly due to the many economic challenges the market is facing.

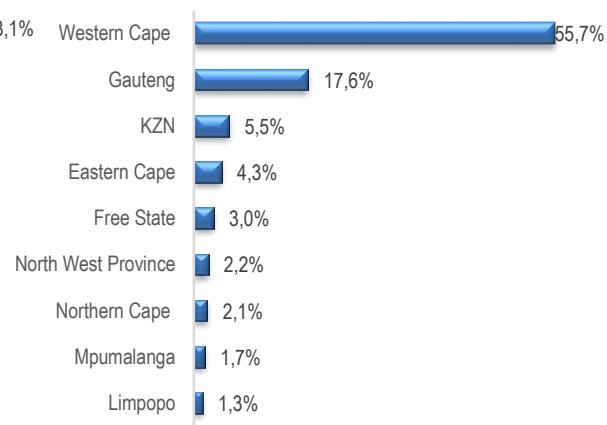
ORIGIN OF VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018



TOP INTERNATIONAL MARKETS TO THE WESTERN CAPE TO ENGAGE IN CULTURE & HERITAGE ACTIVITIES, 2018



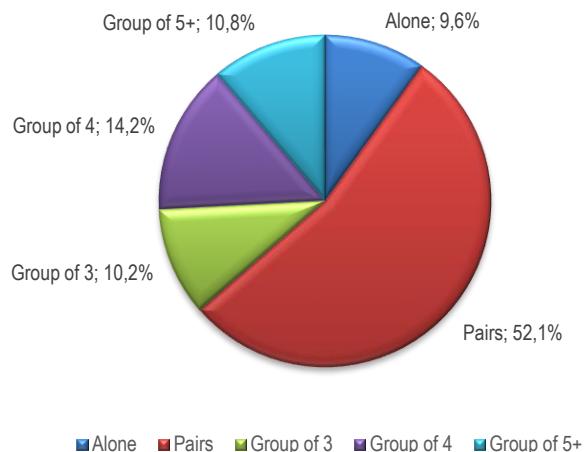
SHARE OF DOMESTIC MARKETS TO THE WESTERN CAPE TO ENGAGE IN CULTURE & HERITAGE ACTIVITIES, 2018



4.4 Western Cape Culture & Heritage Visitor Trends

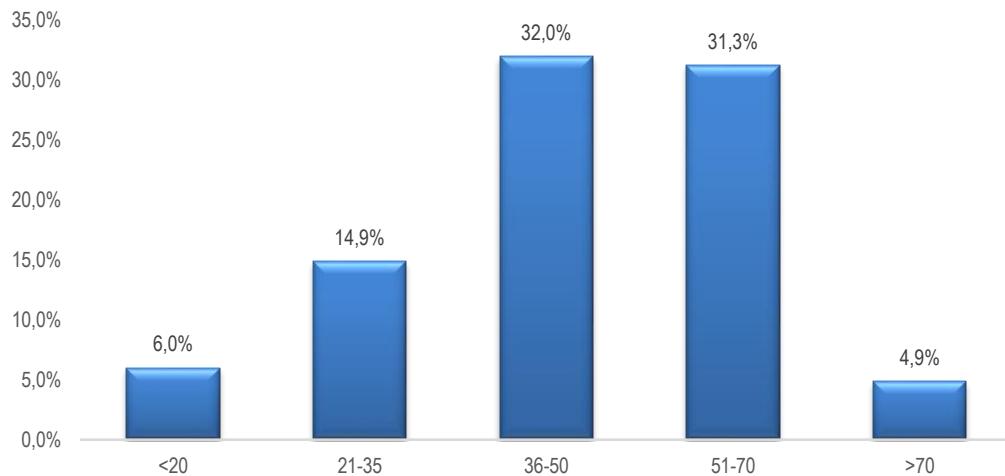
- The majority of respondents who engaged in culture & heritage activities indicated to have travelled in pairs (52,1%) or in groups of 3 or more (35,2%).
- This is not surprising given the fact that 86,8% of respondents cited their main purpose of travel to be for the purpose of holiday/leisure.
- Of those who travelled alone, 7,5% were business travellers which may present an opportunity to expand the Leisure Travel market in the Western Cape.

GROUP SIZE OF VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018



■ Alone ■ Pairs ■ Group of 3 ■ Group of 4 ■ Group of 5+

AGE CATEGORY OF VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018

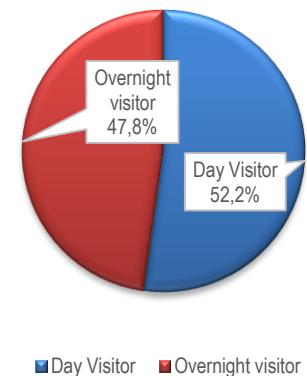


- The vast majority of respondents who engaged in culture & heritage activities indicated to be between the ages of 36 – 50 years (32,0%), and 51 – 70 years (31,3%).
- This is consistent with the general age categories of visitors to the Western Cape.
- However, the proportion of visitors aged 51 – 70 years who engaged in culture & heritage activities is significantly higher than the 24,0% general visitors in this age category.

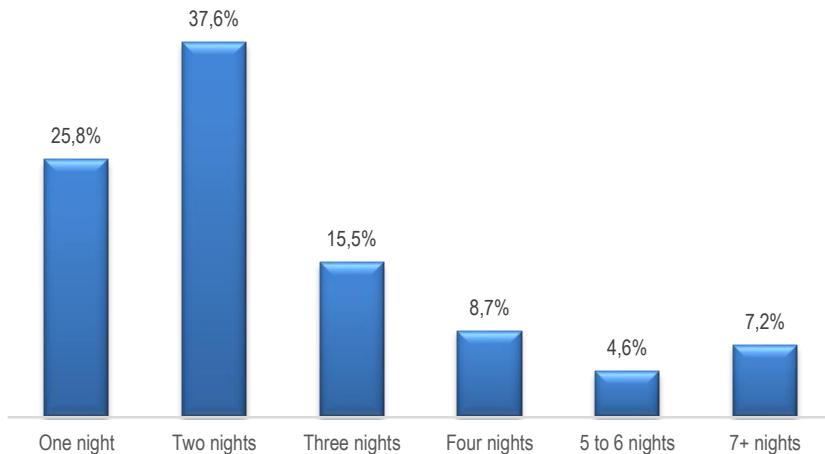
4.4 Western Cape Culture & Heritage Visitor Trends

- Overall visitors to the Western Cape indicated to be majority overnight visitors (51,8%), but 52,2% of respondents who engaged in culture & heritage activities indicated to be day visitors and 48% were overnight visitors. This suggests that visitors who engaged in culture & heritage activities were more likely to visit for the day.
- Those who stayed overnight spent a longer time in the destination with respondents who engaged in culture & heritage activities indicating to spend an average of one night (25,8%), or two nights (37,6%) in the province.
- This trend underlines the Western Cape's desirability for weekend getaways and the popularity of day excursions for locals.
- Self Catering, Guesthouse, and B&B were amongst the top accommodation choices for respondents who engaged in culture & heritage activities in the Western Cape.

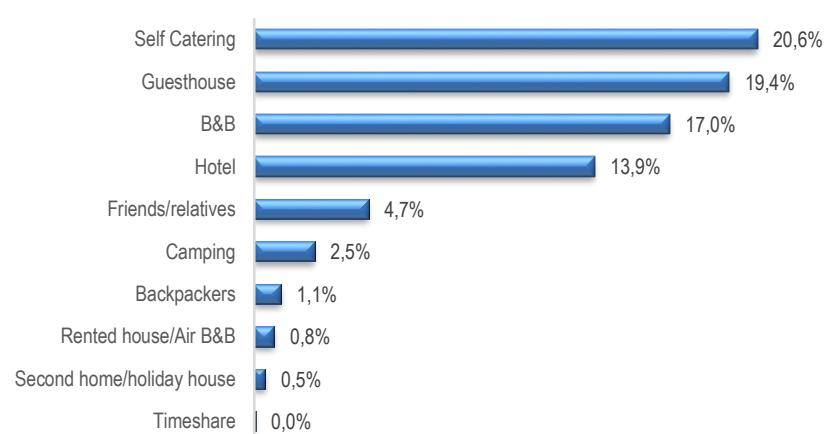
OVERNIGHT & DAY VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018



AVERAGE LENGTH OF STAY OF OVERNIGHT VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018



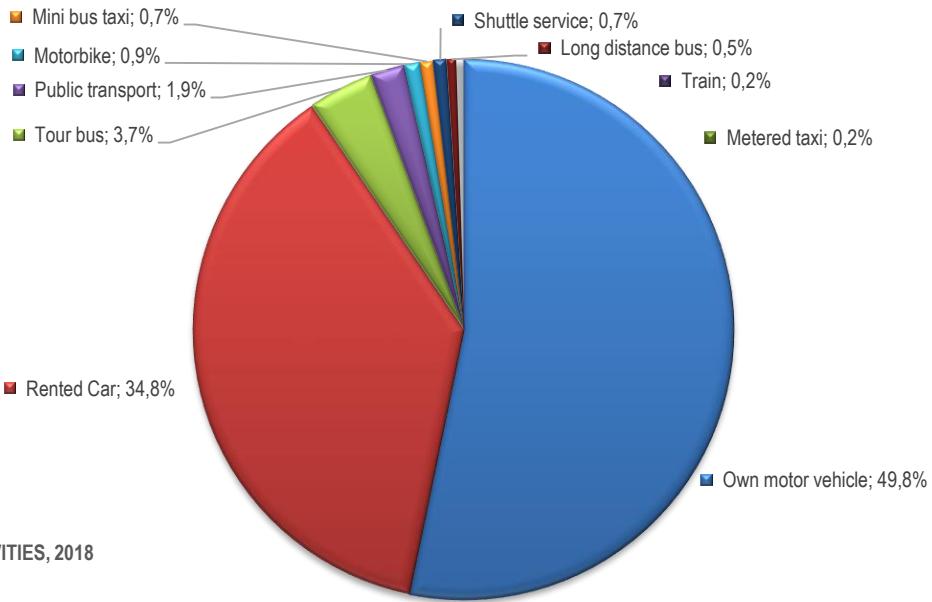
TYPE OF ACCOMMODATION USED BY VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018



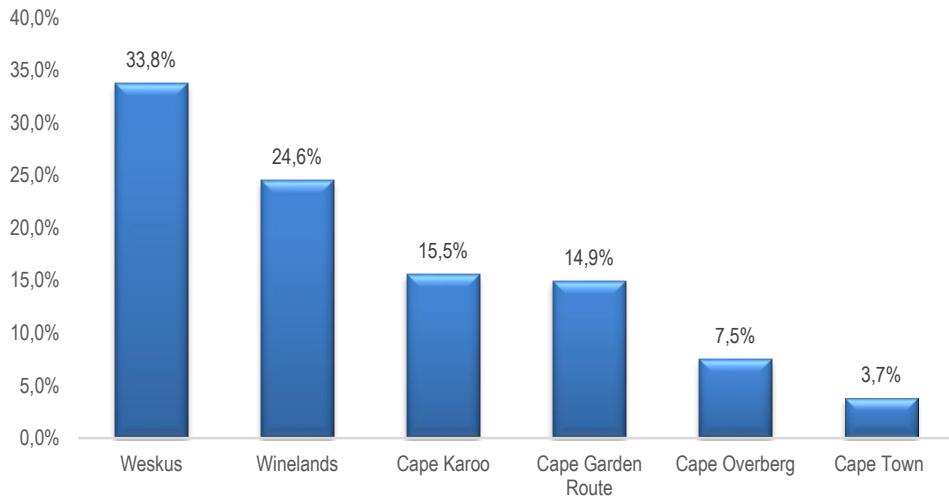
4.4 Western Cape Culture & Heritage Visitor Trends

- The vast majority of respondents who engaged in culture & heritage activities indicated to have travelled via their own motor vehicles (49,8%) or by rented car (34,8%).
- This indicates that visitors who engage in culture & heritage activities prefer to explore on their own rather than with a tour guide.
- The high number of Western Cape locals engaging in culture/heritage activities within their province is a major contributor to these figures.

MODE OF TRANSPORT USED BY VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018



WESTERN CAPE REGIONS VISITED FOR CULTURE & HERITAGE ACTIVITIES, 2018

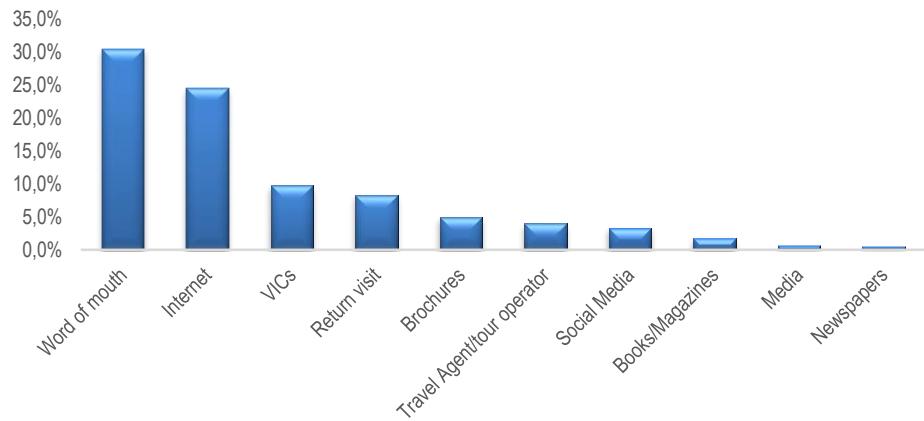


- The most visited region for culture & heritage activities in 2018 was Weskus (33,8%).
- This is not surprising as the Weskus is home to many heritage sites and forms part of the Cradle of Human Culture Routes. The Weskus Culture and Heritage Experience depicts the life and history of the Weskus People from thousands of years ago and allows the visitor to experience the spirit of the “First People” of Southern Africa and kick up dust by dancing the “Riel” in the Cederberg mountains.
- The Cape Winelands and the Cape Karoo are also popular destinations for culture & heritage activities.

4.4 Western Cape Culture & Heritage Visitor Trends

SOURCE OF INFORMATION USED BY VISITORS TO THE WESTERN CAPE WHO ENGAGED IN CULTURE & HERITAGE ACTIVITIES, 2018

- According to respondents, word of mouth (30,5%) and the internet (24,5%) holds the greatest return on investment as effective marketing tools.
- From these trends an evident shift can be seen from marketing collateral to online platforms.



Source: Wesgro Primary Research, 2019





Opportunities for cultural tourism from European Markets

5. Opportunities for cultural tourism from European Markets

- Based on the findings from visitor trends surveys, Europeans are the dominant international source market for culture & heritage activity in the Western Cape. This section aims to provide insights into the opportunities for cultural tourism from Europe from reports published by the Centre for the Promotion of Imports from developing countries in October 2018.
- The European market is one of the largest source markets for long-haul destinations such as the Western Cape, and Europeans are increasingly choosing to travel to new and authentic destinations. Developing countries in Asia hold a 52% share of European travel, mainly due to good air connectivity and affordable ticket prices. African destinations hold a 22% market share, mainly due to easy access between Europe and North African countries. Asian destinations like Turkey, Thailand, and China, as well as Egypt, Morocco, and Tunisia in Africa, are amongst the most popular for Europeans.
- New tourism destinations showing the highest growth in European arrivals between 2012 and 2016 were further away places like Tajikistan, Myanmar, and Iran, confirming the trend that European travellers are increasingly seeking new and authentic destinations to experience its culture and nature.
- The WEF Travel and Tourism Competitiveness Index takes into account ‘Cultural Resources and Business Travel’ and is a good indicator of the cultural attractiveness of a destination. Based on the 2017 Report, developing countries with the highest score in this category were China, Brazil, India, and Mexico. Developing countries with the highest increase in scores between 2015 and 2017 were Azerbaijan, Tajikistan, Vietnam, and Algeria.
- The CBI report findings indicate that there are two types of cultural tourist from Europe:
 - The Motivated cultural tourist – characterized by a higher education background, medium to high income, and a considerable interest in culture, social and environmental issues.
 - The Incidental cultural tourist – Their primary reason for travel is not for the purpose of culture but they enjoy adding cultural activities to their holiday if it fits in with their plans.
- European tourists who engage in cultural activities fall within four age categories:
 - Young and hip (20 – 39 years) – they generally travel as couples or groups of friends and prefer sun and beach holidays but are open to incorporate cultural activities into their trip. Women are generally more interested in cultural elements than men and about a third of this segment are interested in holidays with an emphasis on culture.
 - Middle-aged (40- 54 years) – they make up the majority of European motivated cultural tourists, who travel for the purpose of culture and heritage.
 - Older generation (55 – 70 years) – they generally have more time and money available for travel and have a desire for cultural holidays. They are experienced travellers and are keen to visit ‘bucket list’ destinations. Quality and comfort are important to them.
 - Families with children (25 – 50 years) – they are keen to expose their children to different cultures and often combine a relaxing holiday with cultural activities. Convenience, and health and safety are key considerations for this segment.

5. Opportunities for cultural tourism from European Markets

- European cultural tourists are interested in actively experiencing the culture in a destination by interacting with locals and gaining insights into their daily lives.
- Authenticity is a major factor for European cultural tourists. They enjoy cultural aspects that are supported by locals and are keen to make use of tour groups.
- Their predominant interest is in historical and heritage sites, and they have an interest in sightseeing tours, visiting religious venues, museums, exhibitions, castles and palaces.
- There is a growing market for study tours which are lead by scholars and teachers who have good background knowledge of the destination. The main purpose of the trip is to expand the students cultural knowledge of the destination.
- European cultural tourists are well versed with internet searches on cultural activities in potential destinations. They make use of sites like TripAdvisor, Zoover, Lonely Planet, Thorn Tree Forum, Instagram, Facebook, Twitter, and YouTube. Personal recommendations from family and friends are also valued.
- European cultural tourists increasingly book directly with service providers and commonly use websites like GoNOMAD, The Culture Trip and Wanderlust.
- With many options to choose from, the price of a long-haul trip is determined by factors such as currency exchange rates, the cost of transport for a return trip, and the cost of goods and services in the destination.

6. Key Findings

- European countries dominate the list when it comes to experiencing culture & heritage activities in South Africa. However, African countries such as Mozambique and Swaziland have shown a significant increase in culture & heritage activities since 2016. Leading source markets, USA, UK, and Germany, still holds substantial interest in culture & heritage activities in South Africa.
- On the domestic front, 2018 saw a massive increase in domestic visitors engaging in culture and heritage activities throughout South Africa. After a decline in 2017, domestic visitors opting to engage in culture & heritage activities more than tripled going from 1,5% in 2017 to 5,2% in 2018.
- By province, the Western Cape consecutively held the strongest share of tourist arrivals who indicated Cultural/Historical/Heritage activities as one of their top activities of choice. The Western Cape ranked as the top province for cultural activities, and experienced solid growth in the share of tourists recorded in 2016, increasing from 58,4% in 2015 to 66,2% in 2016.
- The high number of Western Cape locals engaging in culture/heritage activities within their province indicates that local tourism also remains a very important market for the tourism sector, particularly due to the many economic challenges the market is facing.
- The majority of respondents who engaged in culture & heritage activities indicated to have travelled in pairs (52,1%) or in groups of 3 or more (35,2%). Of those who travelled alone, 7,5% were business travellers which may present an opportunity to expand the Bleisure Travel market in the Western Cape.
- The most visited region for culture & heritage activities in 2018 was Weskus (33,8%). This is not surprising as the Weskus is home to many heritage sites and forms part of the Cradle of Human Culture Routes.
- Europeans are the dominant international source market for culture & heritage activity in the Western Cape with 7 out of the top 10 international markets who enjoyed culture/heritage activities in the Western Cape originating from Europe.
- European cultural tourists are interested in actively experiencing the culture in a destination by interacting with locals and gaining insights into their daily lives.
- Authenticity is a major factor for European cultural tourists. They enjoy cultural aspects that are supported by locals and are keen to make use of tour groups.
- Their predominant interest is in historical and heritage sites, and they have an interest in sightseeing tours, visiting religious venues, museums, exhibitions, castles and palaces.
- With many options to choose from, the price of a long-haul trip is determined by factors such as currency exchange rates, the cost of transport for a return trip, and the cost of goods and services in the destination.

7. List of Sources

- South African Tourism
- Wesgro Primary Research
- CBI (Centre for the Promotion of Imports from developing countries)
- UNWTO
- WEF Travel and Tourism Competitiveness Report 2017

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