



# Tourism Niche Study: Events Tourism Visitor Trends Analysis

2019

**WESGRO**  
cape town & western cape  
research

An inspiring place to know

# Contents

1. Methodology
2. Participation and sample size
3. Overview of Events and its role in Tourism
4. Events Tourism Visitor Trends Analysis
  - 4.1 Events tourism in the Western Cape: 3-Year Trends
  - 4.2 Western Cape Event Tourism Visitor Trends
  - 4.3 Event Impact Assessment Overview
5. Event travel: Purchase habits of US leisure travellers
6. Key Findings
7. List of Sources

Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or guarantee 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, 2019.

# 1. Methodology

- This report provides an overview of the tourism trends and patterns amongst visitors who engaged in event 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 4% of these respondents listed events as an in-destination activity. This report focuses on the **914** respondents who engaged in events from the following participating regions:

Cape Garden Route	246
Cape Karoo	24
Cape Overberg	107
Cape Town	3
Weskus	486
Winelands	48





### 3. Overview of Events and its role in Tourism

- Events are an inseparable part of human society, and a significant contributor to the in-destination experience of tourists. In their definition of a special event, Jago and Shaw (1998) assert that it is “A one-time infrequently occurring event of limited duration that provides the consumer with a leisure and social opportunity beyond everyday experience. Such events, which attract or have the potential to attract tourists, are often held to raise the profile, image or awareness of a region”.
- Events and its impact on tourism can be understood to attract more tourists, increase the infrastructure and tourism capacity of a destination, and to create a positive destination image and in doing so create jobs and improve the quality of life of the local population.
- The availability of events creates the opportunity for infrastructure development, increase in hotel occupancy, and profits to local businesses. In addition events play an important role in addressing seasonality in the Western Cape, and attracting visitors during the off-peak periods.
- In a study detailing the means in which destinations can maximize the benefits of Mega Events, the UNWTO asserts that for tourism development it is important to note that a mega event in itself is not a goal but the means to a goal. It “brings more tourists and attention, but without intentional measures, nothing will change after the event”. This can be applied to events of all capacities and destinations are thus encouraged to learn how to take advantage of events as a tool in tourism development .

Sources: UNWTO, 2017. Oklobdžija, S. 2015. *The Role of Events in Tourism Development*. BizInfo Journal



### 3. Overview of Events and its role in Tourism

- In 2011 on the back of the successful delivery of the 2010 FIFA World Cup, the Western Cape Government along with relevant stakeholders, developed an Integrated Events Strategy for 2014 – 2030 to “help realise the vision of Cape Town and the Western Cape as one of the world’s foremost event destinations”.
- Events such as the Design Indaba, Cape Argus Pick n Pay Momentum Cycle Tour, ABSA Cape Epic, Cape Town International Jazz Festival, ABSA Klein Karoo Nasionale Kunstefees and the Old Mutual Two Oceans Marathon were identified as examples of iconic events that collectively make a substantial contribution to the Western Cape’s Regional GDP.
- In addition to bidding for Mega Events and retaining Signature Events, the potential for smaller events that have potential to develop into signature events, as well as leveraging off events that occur in other parts of South Africa to promote tourism, trade and investment form part of the strategy’s events portfolio.
- The strategy provides a guide to decision-making for supporting events and aids the public sector to synergise their efforts to maximise the brand-building potential, as well as economic, social and environmental benefits that can be realised from hosting events.
- The following five strategic focus areas underpin the strategic objectives:
  - Event Insights focus area aims to ensure that decisions to bid for, host and/or support events are based on adequate information, and that events’ economic, social and environmental impacts are properly evaluated prior to and after events.
  - The aim of the Events Portfolio focus area is to create a balanced and sustainable portfolio of events that deliver long term economic, social and environmental benefits for the people of the Western Cape.
  - The Event Facilities and Infrastructure focus area deals with actions that will ensure our suite of event facilities matches the desired events portfolio, and improved management and marketing of existing facilities.
  - The Event Support focus area deals with streamlined approvals processes, joint event planning, improved communication and a strategic approach to providing services to events.
  - The Governance focus area details mechanisms to strengthen co-operation and co-ordination between private and public sector event stakeholders.
- The strategy also recognizes the need for a more rounded assessment of the value of events that goes beyond its economic impact but also takes into account its social, cultural, environmental, infrastructural, and media aspects.
- To this end, the Western Cape Government have developed an Event Impact Assessment Framework in the form of an online tool which allows event organisers to measure their event’s impact, sustainability and growth potential, taking into account economic, people, environmental and governance aspects. This provides a streamlined approach to measuring the impact of events, however, many event organisers still prefer to make use of their own events assessment tools making it difficult to produce standard reporting structures to incorporate all event impact indicators. Measuring the overall impact of events is thus still an area that requires further development.
- The purpose of this niche study is to provide an overview of the key tourism trends and patterns amongst visitors who engaged in event activities throughout the Western Cape. The findings will be based on primary research conducted by Wesgro via the regional tourism offices throughout the region. In addition, the study also provides consumer insights into the purchasing habits of US leisure tourists when travelling specifically for events.

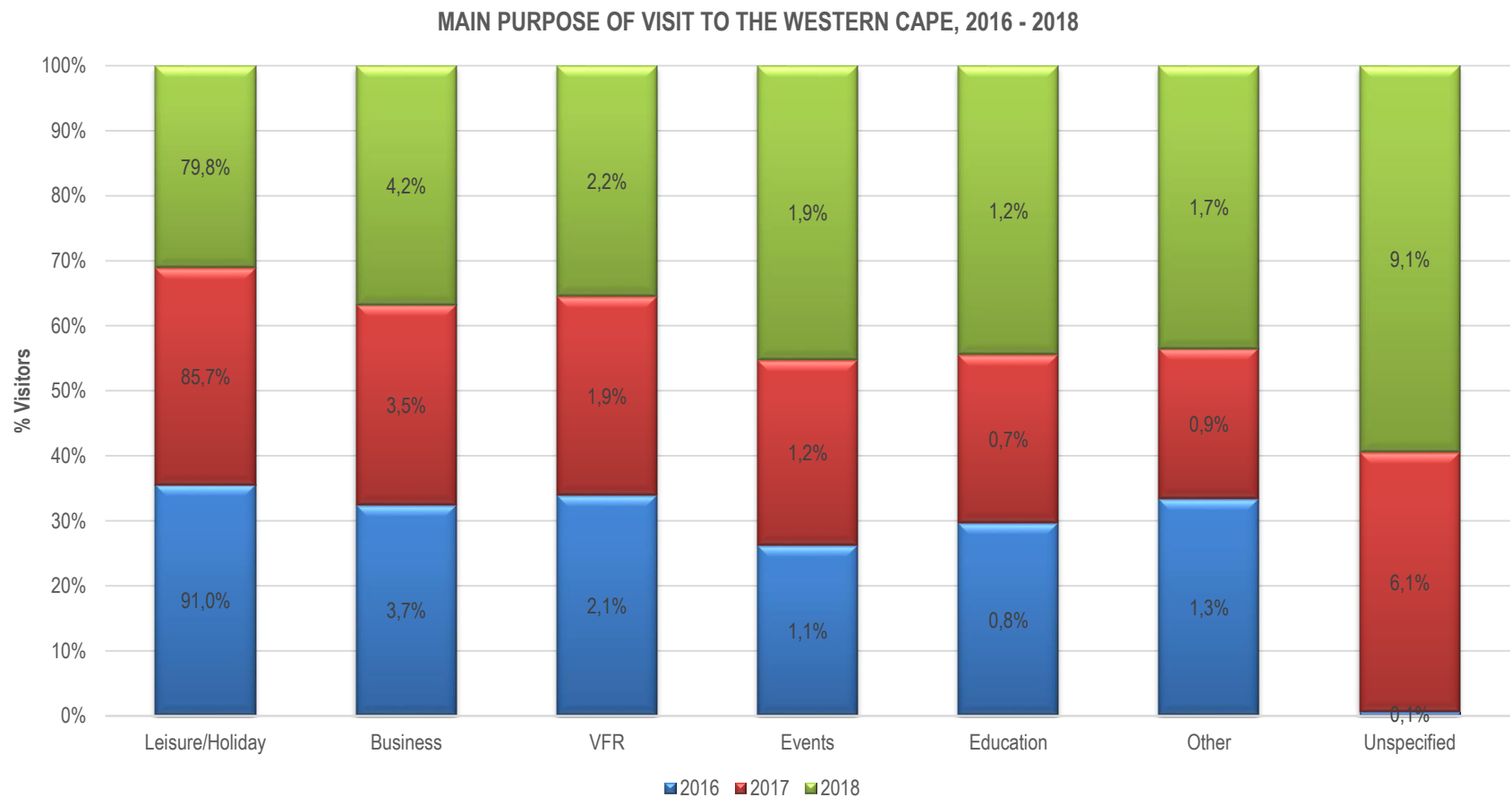




# Event Tourism Visitor Trends Analysis

## 4.1 Events tourism in the Western Cape: 3-Year Trends

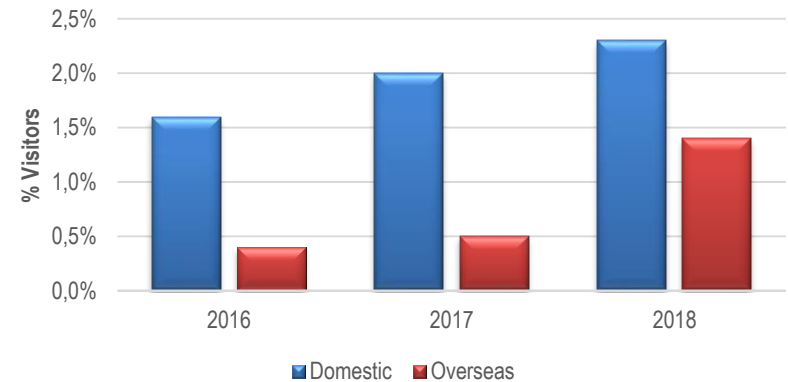
- Western Cape Visitor Trends indicate that travel for the main purpose of attending an event is the 4<sup>th</sup> most popular reason for visiting regions within the province.
- The overwhelming majority of respondents indicated to visit for leisure/holiday consistently across the 3 year period. In 2018, 38,4% of respondents who engaged in event activity, travelled to the destination for the main purpose of holiday/leisure and attended events as a secondary activity.



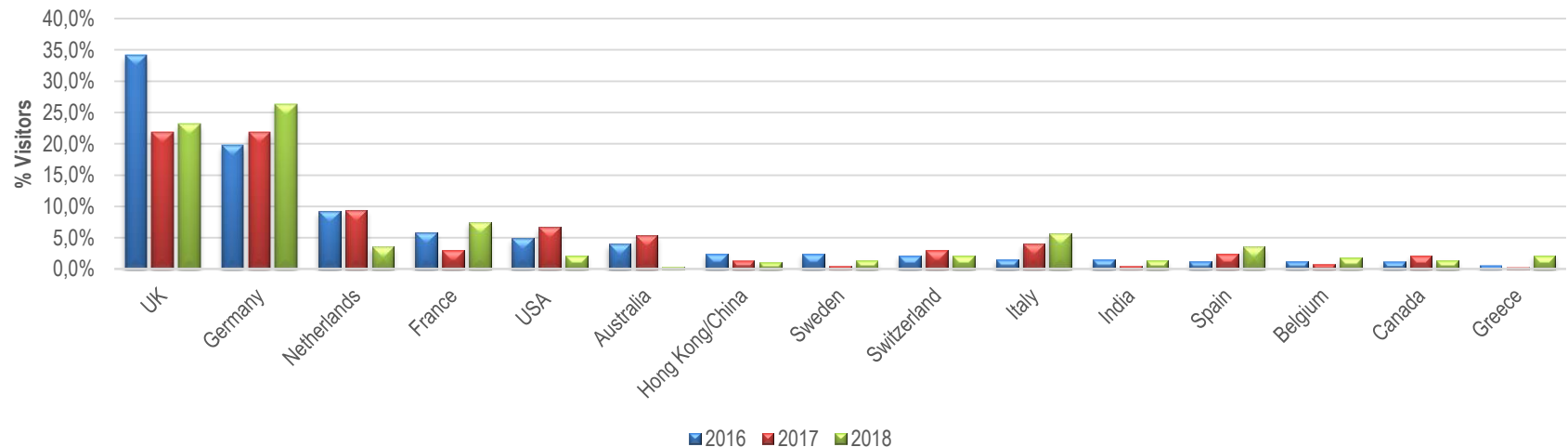
## 4.1 Events tourism in the Western Cape: 3-Year Trends

- Domestic Visitors are more likely to travel to the Western Cape for the main purpose of attending events. In 2018, 2,3% of domestic visitors indicated to have travelled to the Western Cape for the purpose of attending events.
- In addition travelling for events has increased substantially amongst Overseas visitors, going from 0,5% in 2017 to 1,4% in 2018. Although the figure is quite small, it does indicate a rising interest in events in the Western Cape amongst international travellers.
- European countries dominate the list when it comes to engaging in event activities in the Western Cape. Leading source markets, UK, Germany, and Netherlands, continue to hold substantial interest in event activities in the Western Cape. Germany in particular has seen a year-on-year increase of 4.5% from 2017 to 2018.

EVENTS AS THE MAIN PURPOSE OF VISIT: DOMESTIC VS. OVERSEAS VISITORS, 2016 - 2018



TOP COUNTRIES TO ENGAGE IN EVENT ACTIVITIES IN THE WESTERN CAPE, 2016 - 2018

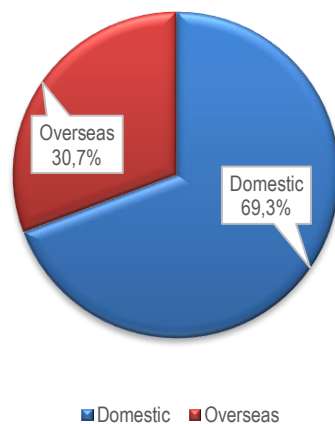




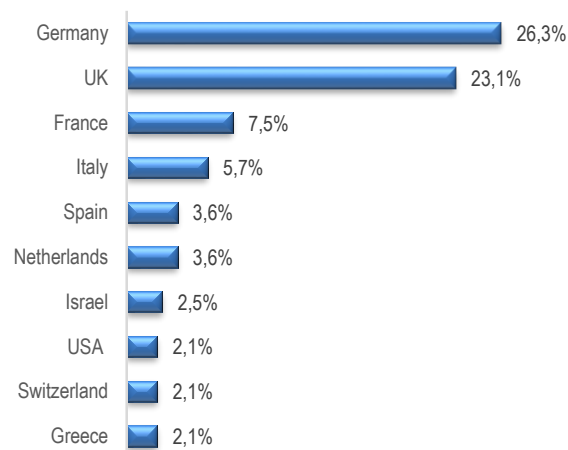
## 4.2 Western Cape Events Tourism Visitor Trends

- The strength of domestic visitors engaging in event activities is evident in the Western Cape, with 69,3% of survey respondents who engaged in event activities originating from the domestic market and 30,7% coming from international markets. It is important to note that a large share of domestic visitors travel directly to the event venues and might not travel via a VIC. The survey respondents indicated here is thus a representative sample of the market.
- Europe dominates in event activity in the Western Cape with 8 out of the top 10 international markets who enjoyed event activities in the Western Cape originating from the continent.
- Israel and USA also ranked in the top 10 markets who enjoyed event activities in the province.
- From the domestic market, the Western Cape (69.0%), Gauteng (9.5%) and KwaZulu-Natal (4.9%) ranked as the top three provinces who embarked on event activities in the province.
- The high number of Western Cape locals engaging in event 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.

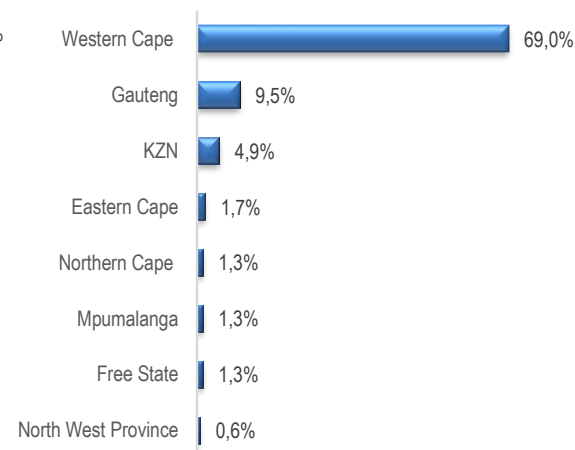
ORIGIN OF VISITORS TO THE WESTERN CAPE WHO ENGAGED IN EVENT ACTIVITIES, 2018



TOP INTERNATIONAL MARKETS TO THE WESTERN CAPE TO ENGAGE IN EVENT ACTIVITIES, 2018



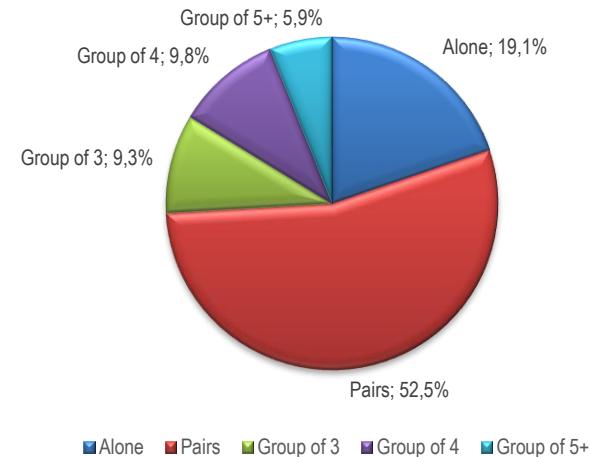
SHARE OF DOMESTIC MARKETS TO THE WESTERN CAPE TO ENGAGE IN EVENT ACTIVITIES, 2018



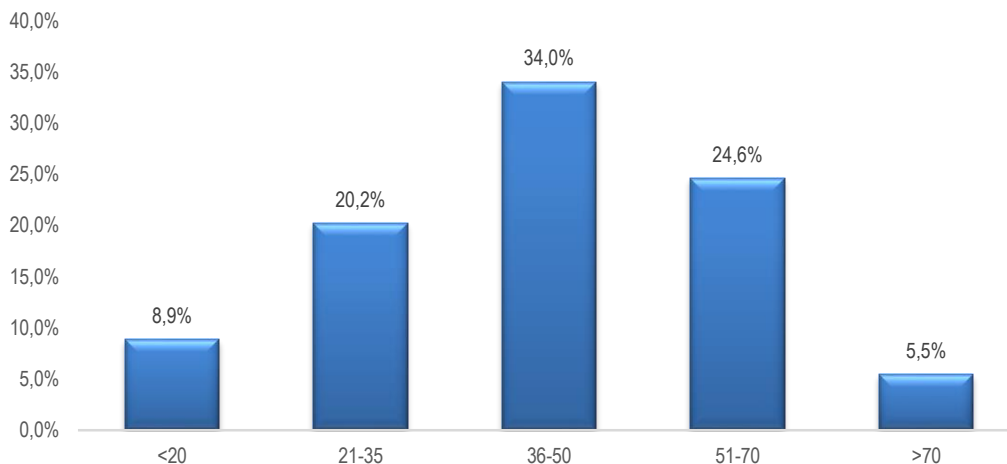
## 4.2 Western Cape Events Tourism Visitor Trends

- The majority of respondents who engaged in event activities indicated to have travelled in pairs (52,5%) or in groups of 3 or more (25,0%).
- In addition, 48,5% of respondents cited their main purpose of travel to be for the purpose of events and 38,4% travelled to the destination for holiday/leisure.

GROUP SIZE OF VISITORS TO THE WESTERN CAPE WHO ENGAGED IN EVENT ACTIVITIES, 2018



AGE CATEGORY OF VISITORS TO THE WESTERN CAPE WHO ENGAGED IN EVENT ACTIVITIES, 2018

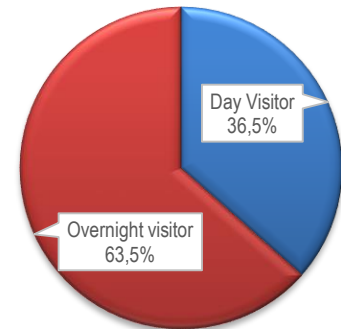


- The vast majority of respondents who engaged in event activities indicated to be between the ages of 36 – 50 years (34,0%), and 51 – 70 years (24,6%).
- This is consistent with the general age categories of visitors to the Western Cape.
- In addition, the proportion of visitors aged 21 – 35 years (20,2%) who engaged in event activities is significantly higher than the 14,5% general visitors in this age category.

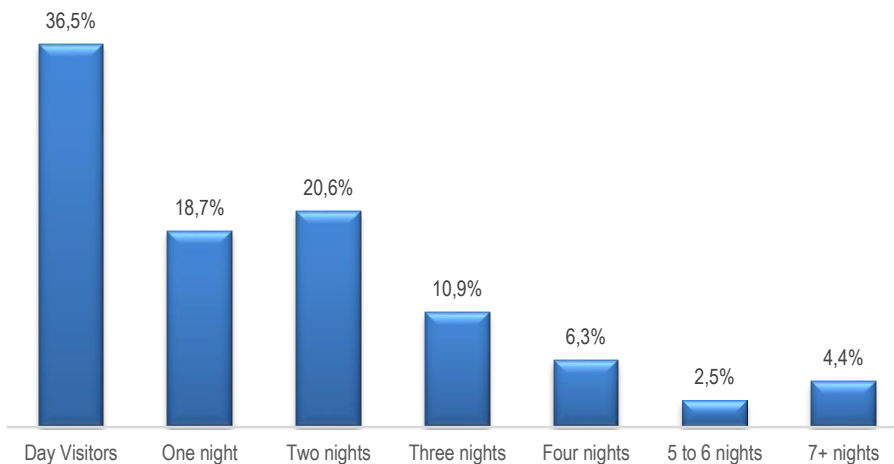
## 4.2 Western Cape Events Tourism Visitor Trends

- Overall visitors to the Western Cape indicated to be majority overnight visitors (51,8%), and keeping with this trend, 63,5% of respondents who engaged in event activities indicated to be overnight visitors and 36,5% were day visitors. This suggests that visitors who engaged in event activities were more likely to stay overnight. This could be attributed to the popularity of events which run over the course of a few days.
- Those who stayed overnight spent a longer time in the destination with respondents who engaged in event activities indicating to spend an average of two nights (20,6%), or 3 or more nights (24,1%) in the province.
- This trend underlines the Western Cape's desirability for weekend getaways and the popularity of day excursions for locals.
- B&B, Self Catering, and Guesthouse, were amongst the top accommodation choices for respondents who engaged in event activities in the Western Cape.

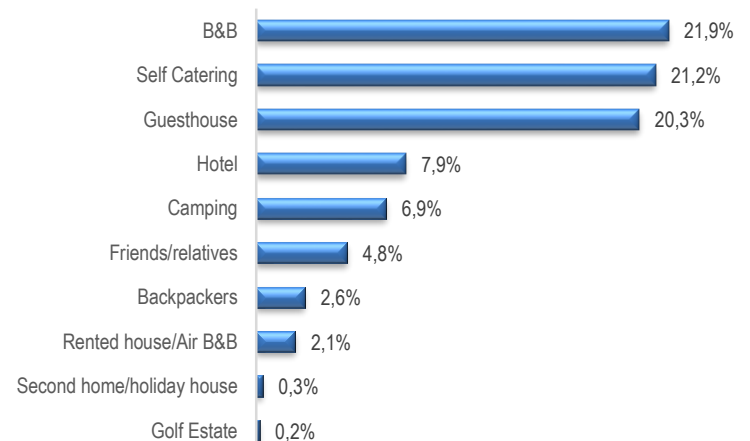
OVERNIGHT & DAY VISITORS TO THE WESTERN CAPE WHO ENGAGED IN EVENT ACTIVITIES, 2018



AVERAGE LENGTH OF STAY VISITORS TO THE WESTERN CAPE WHO ENGAGED IN EVENT ACTIVITIES, 2018



TYPE OF ACCOMMODATION USED BY OVERNIGHT VISITORS TO THE WESTERN CAPE WHO ENGAGED IN EVENT ACTIVITIES, 2018

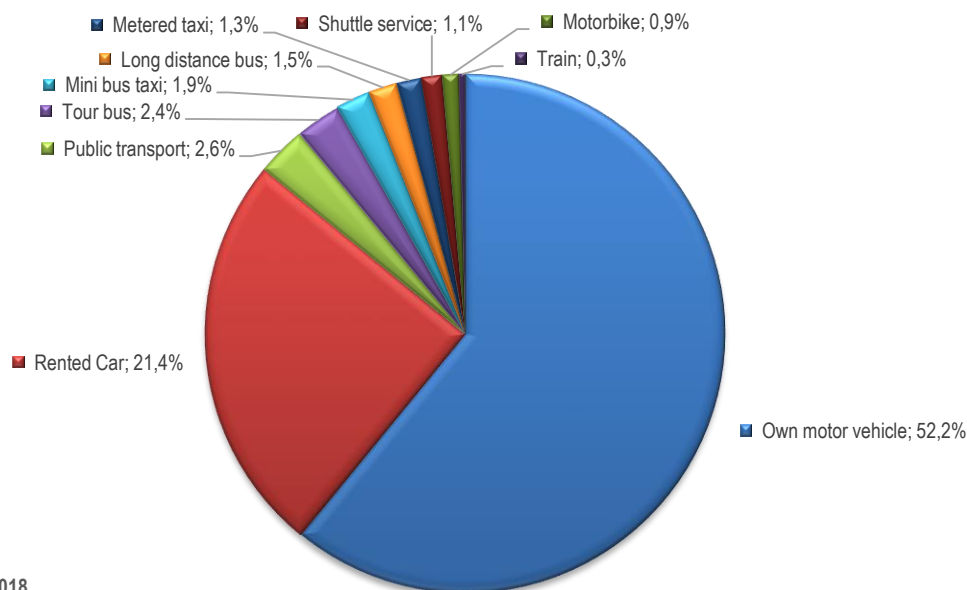




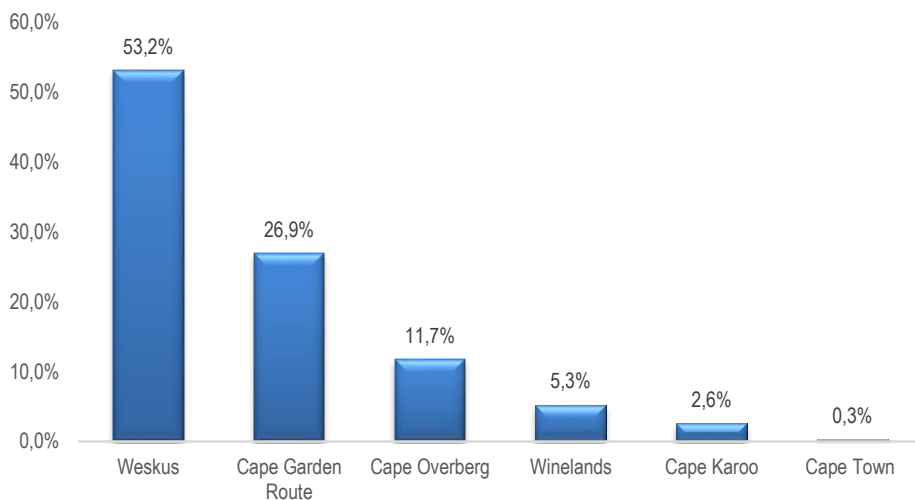
## 4.2 Western Cape Events Tourism Visitor Trends

- The vast majority of respondents who engaged in event activities indicated to have travelled via their own motor vehicles (52,2%) or by rented car (21,4%).
- This indicates that visitors who engage in event activities prefer to explore on their own rather than with a tour guide.
- The high number of Western Cape locals engaging in event activities within their province is a major contributor to these figures.

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



WESTERN CAPE REGIONS VISITED FOR EVENT ACTIVITIES, 2018

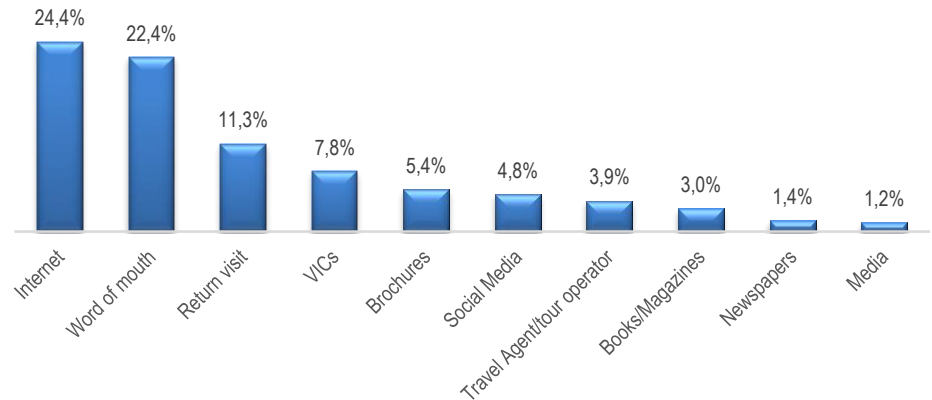


- The most visited region for event activities in 2018 was Weskus (53,2%).
- This is not surprising as events and festivals held in the Weskus throughout 2018 attracted 164,520 visitors to the region. Of the event numbers which was received by tourism representatives, the top star performing events which attracted the highest number in visitors included the Wildflower/flower shows in Darling, Mooresburg and Malmesbury (27,600) in September, the Kyknet Ekspo (19,000) in February and Rocking the Daisies in October (15,000). These events collectively served as a strong catalyst for economic growth in the respective towns along the region.
- The Garden Route and Cape Overberg are also popular destinations for event activities.

## 4.2 Western Cape Event Tourism Visitor Trends

- According to respondents, the internet (24,4%) and word of mouth (22,4%) holds the greatest return on investment as effective marketing tools.
- These trends indicate that when it comes to events, word of mouth, whether via personal engagement or online platforms, plays a key role in visitor participation.
- Return visits is the 3<sup>rd</sup> most popular source of information which suggests that visitors tend to return to an event annually.

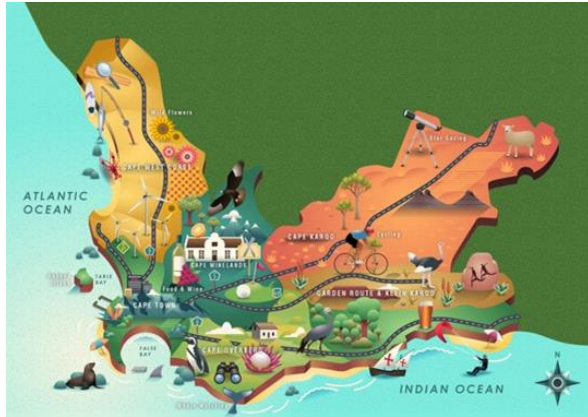
SOURCE OF INFORMATION USED BY VISITORS TO THE WESTERN CAPE WHO ENGAGED IN EVENT ACTIVITIES, 2018



Source: Wesgro Primary Research, 2019



## 4.3 Event Impact Assessment Overview



**5 937** temporary  
jobs created

Over **236 356**  
visitors to the regions

**April –  
September** 2018  
(time events took place)

**43 events took  
place in the 5**  
regions outside the city

Wesgro funding  
investment  
**R1.9m**

Estimated economic  
impact over  
**R215m**

An inspiring place to discover





**Event travel: Purchase habits of US leisure travellers**

## 5. Event travel: Purchase habits of US leisure travellers

- A consumer trends survey conducted by Arival in 2018, reveals that nearly half of all US leisure travellers attend events during their trip. The report which measures the role of events in travel, is based on an online survey conducted with 1000 US adult travellers (18+) who took a trip 100+ miles from home, which included an overnight stay, and engaged with a qualifying in-destination experience.
- When researching the events they plan to attend, US leisure travellers predominantly use online resources via computers, tablets and mobile devices and are heavily influenced by recommendations from friends and family both in person and on social media.
- When booking their event tickets, US leisure travellers use online booking channels at a higher rate than other in-destination experiences. They tend to book via laptops, computers or tablets and mobile phone, but a significant number of event attendees still make use of the ticket window at the venue. Some respondents (8%) indicated to have booked via the hotel concierge and a small portion booked via a travel agent (6%) or part of a tour package (4%).
- Nearly a quarter of travellers booked their event tickets directly through the organizers website, and the vast majority of respondents (64%) purchased their tickets via third-party ticketing sites. Despite having used online resources in the research process, only 3% of respondents indicated to have booked their event tickets via travel websites such as TripAdvisor or Expedia.
- One of the key findings noted by Arival's study is that lack of awareness is a major impeding factor to event attendance and online travel sites have a natural advantage in knowing the travel dates and location of their customers. This creates an opportunity for the online travel industry to deliver personalized booking options that could enhance the destination offering to both leisure and business travellers.
- Because events happen at a specific time and have capacity limitations, travellers tend to book their tickets in advance. However, the decision for advance purchase is motivated by the importance of the event within the overall trip decision.
- Respondents who did not book event tickets in advance cited a desire for more flexibility as the primary reason. The other notable reason was a lack of awareness with 18% of respondents indicating that they only found out about the event at the last minute, and 15% and 14% citing that they did not think about it and did not know what they wanted to do, respectively.
- This presents an opportunity for travel brands to capitalize on the knowledge of their guests' travel itineraries and provide value added services which incorporates event and other in-destination experiences.

## 6. Key Findings

- Western Cape Visitor Trends indicate that travel for the main purpose of attending an event is the 4<sup>th</sup> most popular reason for visiting regions within the province. In addition 2018 trends reveal that more than a third of respondents who engaged in event activity, travelled to the destination for the main purpose of holiday/leisure and attended events as a secondary activity.
- Domestic Visitors are more likely to travel to the Western Cape for the main purpose of attending events. In 2018, 2,3% of domestic visitors indicated to have travelled to the Western Cape for the purpose of attending events.
- In addition travelling for events has increased substantially amongst overseas visitors, going from 0,5% in 2017 to 1,4% in 2018. Although the figure is quite small, it does indicate a rising interest in events in the Western Cape amongst international travellers.
- Visitors who engaged in event activities were more likely to stay overnight and spend a longer time in the destination. This trend underlines the Western Cape's desirability for weekend getaways and the popularity of day excursions for locals.
- The most visited region for event activities in 2018 was Weskus (53,2%). This is not surprising as events and festivals held in the Weskus throughout 2018 attracted 164,520 visitors to the region.
- When booking their event tickets, US leisure travellers tend to book via laptops, computers or tablets and mobile phone, but a significant number of event attendees still make use of the ticket window at the venue. Some respondents (8%) indicated to have booked via the hotel concierge and a small portion booked via a travel agent (6%) or part of a tour package (4%). Nearly a quarter of travellers booked their event tickets directly through the organizers website, and the vast majority of respondents (64%) purchased their tickets via third-party ticketing sites. Despite having used online resources in the research process, only 3% of respondents indicated to have booked their event tickets via travel websites such as TripAdvisor or Expedia.
- One of the key findings noted by Arival's study is that lack of awareness is a major impeding factor to event attendance and online travel sites have a natural advantage in knowing the travel dates and location of their customers. This creates an opportunity for the online travel industry to deliver personalized booking options that could enhance the destination offering to both leisure and business travellers.
- Respondents who did not book event tickets in advance cited a desire for more flexibility as the primary reason. The other notable reason was a lack of awareness with 18% of respondents indicating that they only found out about the event at the last minute, and 15% and 14% citing that they did not think about it and did not know what they wanted to do, respectively.
- This presents an opportunity for travel brands to capitalize on the knowledge of their guests' travel itineraries and provide value added services which incorporates event and other in-destination experiences.



## 5. List of Sources

- South African Tourism
- Wesgro Primary Research
- CBI (Centre for the Promotion of Imports from developing countries)
- UNWTO, *Maximizing the Benefits of Mega Events for Tourism Development*, 2017
- WEF Travel and Tourism Competitiveness Report 2017
- Western Cape Government, *The Cape of Great Events: Strategy Summary for 2014 – 2030*.
- Oklobdžija, S. 2015. *The Role of Events in Tourism Development*. BizInfo Journal



**WesGRO**  
cape town & western cape  
research

An inspiring place to know