

SECTION 4. VISITOR SURVEY

4.1 BACKGROUND

Our methodology for Phase 5 of the Buffalo City Tourism Master Plan required that we conduct a survey of visitors to the study area. We conducted a visitor survey comprising a survey sample of 560 questionnaires from 26 April 2003 to 4 May 2003 (over the Easter Holiday period) and the results are analysed below.

In the following summary of the results where respondents did not complete a specific field in the questionnaire we show it as missing and calculate the percentage including the missing fields (“Percent”) as well as excluding the fields (“Valid Percent”).

In presenting the survey results, the question asked during the survey is included in the table providing the result rather than providing each table with a heading. The full questionnaire is also included as **Annexure B**.

4.2 SURVEY RESULTS

4.2.1 Location

The survey sample is spread geographically through the study area with 82% of respondents being surveyed in East London and 18% in King William’s Town.

Location of Survey	Frequency	Percent	Valid Percent
East London	459	82.0	82.0
King William’s Town	101	18.0	18.0
Total	560	100.0	100.0

4.2.2 Gender

Slightly more males than females were surveyed with 6 respondent not completing this field in the questionnaire.

Gender of Respondents	Frequency	Percent	Valid Percent
Female	239	42.7	43.1
Male	315	56.3	56.9
Total	554	98.9	100.0
Missing	6	1.1	
Total	560	100.0	

4.2.3 Race

The race profile was split between 40% African, 51% White, 5% Coloured and 5% Indian.

Race Profile	Frequency	Percent	Valid Percent
African	221	39.5	40.0
Coloured	28	5.0	5.1
Indian	25	4.5	4.5
White	279	49.8	50.5
Total	553	98.8	100.0
Missing	7	1.3	
Total	560	100.0	

4.2.4 Origin

85% Of the respondents surveyed were South African residents with 15% being foreigners.

Do you live in South Africa?	Frequency	Percent	Valid Percent
No	87	15.5	15.5
Yes	473	84.5	84.5
Total	560	100.0	100.0

The respondents surveyed that did not live in South Africa originate from a variety of countries as shown in the table below.

No one country dominated the survey sample of foreign visitors with the highest share of respondents from one country being Zimbabwe (15%), followed by France (8%) and Italy and the UK (both 7%).

The high share of Zimbabweans in the survey sample may be a result of Buffalo City may having a fair share of illegal immigrants from Zimbabwe living in the study area.

In which country do you live?	Frequency	Percent	Valid Percent
Australia	1	.2	1.2
Belgium	3	.5	3.5
Botswana	1	.2	1.2
Canada	3	.5	3.5
Denmark	1	.2	1.2
France	7	1.3	8.2
Germany	5	.9	5.9
Ghana	4	.7	4.7
India	1	.2	1.2
Italy	6	1.1	7.1
Kenya	3	.5	3.5
Lesotho	5	.9	5.9
Namibia	2	.4	2.4
New Zealand	1	.2	1.2
Nigeria	2	.4	2.4
Portugal	1	.2	1.2
Russia	1	.2	1.2
Spain	3	.5	3.5
Swaziland	1	.2	1.2
Sweden	2	.4	2.4
Switzerland	2	.4	2.4
Tanzania	2	.4	2.4
UK	9	1.6	10.6
Ukraine	1	.2	1.2
USA	3	.6	3.6
Zambia	2	.4	2.4
Zimbabwe	13	2.3	15.3
Total	85	15.2	100.0
Missing	475	84.8	
Total	560	100.0	

The majority of respondents that live in South Africa come from the Eastern Cape (72%), followed by Gauteng (7%) and the Western Cape (6%).

In which province do you live?	Frequency	Percent	Valid Percent
Eastern Cape	337	60.2	71.5
Free State	22	3.9	4.7
Gauteng	31	5.5	6.6
KwaZulu-Natal	23	4.1	4.9
Limpopo	2	.4	.4
Mpumalanga	8	1.4	1.7
Northern Cape	12	2.1	2.5
North West	7	1.3	1.5
Western Cape	29	5.2	6.2
Total	471	84.1	100.0
Missing	89	15.9	
Total	560	100.0	

The majority of the survey sample from the Eastern Cape lives less than 1 hours drive from East London or King William's Town.

How far from East London or King William's Town do you live?	Frequency	Percent	Valid Percent
Between 1 and 2 hours drive from EL/ KWT	29	5.2	7.3
Less than 1 hours drive from EL/ KWT	244	43.6	61.8
More than 2 hours drive from EL/ KWT	122	21.8	30.9
Total	395	70.5	100.0
Missing	165	29.5	
Total	560	100.0	

4.2.5 Age

What is your age group?	Frequency	Percent	Valid Percent
<18yrs	19	3.4	3.6
18-30yrs	184	32.9	34.9
31-44yrs	160	28.6	30.4
45-55yrs	125	22.3	23.7
56-65yrs	29	5.2	5.5
>65yrs	10	1.8	1.9
Total	527	94.1	100.0
Missing	33	5.9	
Total	560	100.0	

The respondents are evenly split between the age categories of 18 – 30 years, 31 – 44 years and 45 – 55 years.

4.2.6 Reason for Visit

The reason for visit is evenly spread between holiday (29%), business (28%) and day visit (28%).

Reason for visiting Buffalo City?	Frequency	Percent	Valid Percent
Business	108	19.3	27.9
Conference	22	3.9	5.7
Day Visit	107	19.1	27.6
Family/ Family	2	.4	.5
Graduation	5	.9	1.3
Holiday	112	20.0	28.9
Sport	5	.9	1.3
Visit Family	26	4.6	6.7
Total	387	69.1	100.0
Missing	173	30.9	
Total	560	100.0	

4.2.7 Income

Half of the respondents fall within two income categories namely a gross annual household income of more than R151 000 and between R25 000 – R50 000.

What is your approximate gross annual household income?	Frequency	Percent	Valid Percent
<R25 000	46	8.2	11.2
R101 000 – R150 000	52	9.3	12.7
R25 000 – R50 000	94	16.8	22.9
R51 000 – R75 000	62	11.1	15.1
R76 000 – R100 000	37	6.6	9.0
>R151 000	120	21.4	29.2
Total	411	73.4	100.0
Missing	149	26.6	
Total	560	100.0	

4.2.8 Household

On average, respondents have 3 adults in their household, with 2 children under the age of 15.

	How many adults in your household?	6. How many children (<15yrs old) in your household?
Valid	501	373
Missing	59	187
Mean	2.92	1.97

4.2.9 Attractions Visited

The attraction that are mentioned the most as being visited by the respondents are the restaurants and bars (77%), followed by the beach (75%), shopping centres (69%) and the cinema (58%).

Attractions Visited	CINEMA	AQUARIUM	Beach/ Beach Activities	THE ZOO	Restaurants & Bars	Craft Markets	Shopping Centres	Historical Sites	E L Museum / Art Gallery	Theatre / Concerts	CASINO	Cultural Village	Water Park	
Valid	387	324	77	421	112	430	58	386	50	121	95	76	24	5
Missing	173	236	483	139	448	130	502	174	510	439	465	484	536	555
Share		58%	14%	75%	20%	77%	10%	69%	9%	22%	17%	14%	4%	1%

4.2.10 Average Spend

It is important to note that the spend relates to the total spend per group per visit to an attraction and not to the spend of a person per visit.

The attractions that attracted the highest spend were shopping centres with R630 per group per visit, followed by restaurants and bars with R238 and the casino with R219 each per visit.

The table below also indicates the minimum and maximum result indicated by respondents. The minimum amount spent at any one attraction is R20, while the maximum is R6 000 at shopping centres.

Average Spend per Attraction	Cinema	Aquarium	Beach/ Beach Activities	The Zoo	Restaurants & Bars	Craft Markets	Shopping Centres	Historical Sites	E. L. Museum / Art Gallery	Theatre / Concerts	Casino	Cultural Village	Water park
Valid	320	75	397	107	422	56	384	43	119	92	73	24	5
Missing	240	485	163	453	138	504	176	517	441	468	487	536	555
Mean	105.47	184.67	112.29	89.35	238.51	135.89	630.96	92.56	80.34	198.15	219.59	84.58	80.00
Minimum	20	50	20	20	30	20	50	20	20	30	50	30	50
Maximum	300	500	400	400	2000	2000	6000	300	500	600	2000	380	200

In terms of other activities and special events, the average spend was R158 on shows and R133 spent on racing events.

The highest amount spend was on shows with R800 being spent by a group on one visit.

	Shows	Racing (Kart, etc)	Sports Events (Soccer, cricket, etc)	Adventure Sports (Mountain biking, etc)	Fishing / Angling	Religious Gatherings
Valid	144	41	230	20	36	24
Missing	416	519	330	540	524	536
Mean	157.92	133.17	122.52	93.00	113.89	60.04
Minimum	30	50	20	30	20	1
Maximum	800	500	500	300	450	100

4.2.11 Factors Influencing Decision to Visit

The main factors influencing respondents to visit Buffalo City is friends and family, advertising and word of mouth.

These reasons are consistent with the main profile of visitors to Buffalo City, namely domestic visitors to friends and family.

Which of the following Factors influenced your decision to visit or stay in Buffalo City area	Frequency	Percent	Valid Percent
Activities	21	3.8	6.1
Advertising	71	12.7	20.6
Attractions	50	8.9	14.5
Business	21	3.8	6.1
Climate	26	4.6	7.5
Conference	2	0.4	0.6
Family/ Friends	72	12.9	20.9
Special Event : Graduation	3	0.5	0.9
Special Event : School Function	3	0.5	0.9
Special Event : Wedding	1	0.2	0.3
Sport	10	1.8	2.9
Word of Mouth	65	11.6	18.8
No reason given	215	38.4	100
Total	560	100	

4.2.12 Travel Arrangements

The majority of travellers made their own travel arrangements, which is again consistent with domestic visitors to friends and family.

How did you make your travel arrangements?	Frequency	Percent	Valid Percent
Family/ Friends	29	4.6	7.4
Internet	12	2.1	3.0
Made own arrangements	306	54.6	77.7
Travel Agent	47	8.4	11.9
No reason given	166	29.6	100.0
Total	560	100	

4.2.13 Rating of Visit

The general rating of the respondents visit to Buffalo City was “good” (60%) with 21% of respondents rating the experience as “very good” and 5% as “excellent”.

How would you rate your stay/ visit to Buffalo City?	Frequency	Percent	Valid Percent
Excellent	26	4.6	4.9
Very Good	110	18.9	20.9
Good	316	56.4	60.1
Fair	70	12.5	13.3
Poor	4	0.7	0.8
No rating given	34	6.1	100
Total	560	100	

4.2.14 Problems Encountered

Of the respondents that answered the question, 19% encountered some kind of problem during their visit to Buffalo City. The most common problem encountered was related to safety and security.

It is encouraging to see that 81% of the respondents that did answer the question did not experience any problems during their stay in Buffalo City.

Have you encountered any problems during your stay/ visit to Buffalo City?	Frequency	Percent	Valid Percent
No problems encountered	265	47.3	81.0
Safety and Security	55	9.8	16.8
Racism	2	0.4	0.6
No jobs	2	0.4	0.6
Transport	3	0.5	0.9
Missing	233	41.6	100
Total	560	100	

4.2.15 What is Lacking in Buffalo City

When asked what was lacking in the Buffalo City area, the most frequent answer by respondents was related to activities, events, attractions and sport facilities.

What do you feel is lacking in the Buffalo City area?	Frequency	Percent	Valid Percent
Accommodation	14	2.5	2.7
Activities	125	22.3	23.9
Affordability	4	0.7	0.8
Amusement Park	19	3.4	3.6
Attractions	91	16.3	17.4
Casino	4	0.7	0.8
Eating out facilities	11	2.0	2.1
Event facilities	22	3.9	4.2
Events	118	21.1	22.6
Marketing	8	1.4	1.5
Others : Improve the beach front	7	1.3	1.3
Others : Transportation	5	0.9	1.0
Others: Miscellaneous	5	0.9	1.0
Please List : Improve the beach front	6	1.1	1.1
Safety & Security	4	0.7	0.8
Services (bus tours, car rental)	16	2.9	3.1
Sport	6	1.1	1.1
Sports Facilities	58	10.4	11.1
Missing	37	6.6	100
Total	560	100	

4.3 MARKET SEGMENTS

In order to assist with our market segmentation we have analysed the 560 respondents based within the two broad criteria of origin i.e. foreign or domestic.

It should be note that a survey sample of less than 30 is considered to be too small to draw valid conclusion and we have highlighted the small survey samples below.

4.3.1 Domestic Market Segments

473 Of the respondents live in South Africa. Of these 337 who originated from within the Eastern Cape are analysed below.

Breakdown of Visitors to Buffalo City from the Eastern Cape

	African	Coloured	Indian	White
Number	132	17*	14*	174
Sex	Male (60%)	Male (65%)	Male (57%)	Male (54%)
Age	18 – 30 (39%)	18 – 30 (64%)	18 – 30 (69%)	18 – 30 (43%)
Income	R25 – R50 000 (31%)	R25 – R50 000 (60%)	>R151 000 (50%)	R25 – R50 000 (30%) >R151 000 (20%)
Reason for Visit	Day Visit (70%)	Day Visit (100%)	Day Visit (71%)	Business (51%)
Attractions	Shopping 104 Beach 101 Restaurants 94 Cinema 66	Restaurants 14 Beach 14 Cinema 14 Shopping 13	Beach 14 Restaurants 11 Cinema 9 Shopping 8	Shopping 132 Restaurants 128 Cinema 116 Beach 112
Activities	Sport 85 Shows 35 Religious 26	Sport 12 Shows 9	Sport 9 Shows 8	Sport 94 Shows 45 Racing 34 Fishing 30
Accommodation	VFR 13 Hotel 9	VFR 3 Hotel 3	Hotel 1	VFR 23 Hotel 20

* Caution: Small Survey Sample

Of the visitors to Buffalo City that originate from within the Eastern Cape, most are male across the racial groups. The visitors also tend to be between the ages of 18 and 30 years.

The White and Indian visitors are more likely to be in the upper income groups with black visitors originating from household with a monthly income of between R25 000 to R50 000.

The main reason for visit is day visitors, except for the white visitors who stated business as their reason for visit. No significant difference exists between the attractions and activities visited by the various racial groups.

The respondents that originated from other provinces are analysed below.

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	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Number	337	22*	31	23*	2*	8*	12*	7*	29
Race	White (52%) African (39%)	White (55%) Coloured (45%)	White (45%) African (48%)	White (61%) African (35%)	African (100%)	White (50%) African (38%)	White (33%) African (67%)	White (29%) African (71%)	White (41%) African (24%)
Sex	Male (57%)	Male (59%)	Female (55%)	Female (57%)	Male (100%)	Male (75%)	Male (67%)	Male (57%)	Male (59%)
Age	18 – 30 (43%)	31 – 44 (32%)	31 – 44 (45%)	31 – 44 (38%) 45 – 55 (38%)	31 – 44 (100%)	18 – 30 (43%) 31 – 44 (43%)	31 – 44 (83%)	45 – 55 (57%)	18 – 30 (62%)
Income	R25 – R50 000 (32%)	>R151 000 (53%)	>R151 000 (54%)	>R151 000 (60%)	R76 – R100 000 (50%) R101 – R150 000 (50%)	R51 – R75 000 (86%)	R101 – R150 000 (36%)	>R151 000 (57%)	R25 – R50 000 (32%)
Reason for Visit	Day Visit (54%)	Holiday (55%)	Holiday (58%)	Holiday (48%)	Business (50%) Holiday (50%)	Sport (63%)	Holiday (42%)	Business (50%)	Business (32%) Holiday (32%)
Attractions	Shopping 257 Beach 241 Restaurants 247 Cinema 205	Beach 19 Shopping 15 Restaurants 13 Cinema 12	Beach 29 Restaurants 27 Shopping 20	Beach 22 Restaurants 19 Shopping 16	Beach 2 Restaurants 2	Beach 8 Restaurants 8	Restaurants 11 Beach 11	Restaurants 7 Beach 7 Cinema 7	Beach 28 Restaurants 23 Cinema 22 Shopping 21
Activities	Sport 200 Shows 97	Sport Events 10 Shows 6	Sport Events 12 Shows 12	Shows 8	Sport Events 1	Sport Events 7	Sport Event 2 Shows 1 Racing 1	Sport Event 3	Sport Events 13 Shows 9
Accommodation	VFR 39 Hotel 33	Hotel 14	Hotel 22	Hotel 18	B& B 2	Hotel 7	Hotel 5	Hotel 4 VFR 2	Hotel 8 VFR 6 B&B 5

Visitors to Buffalo City that originated from provinces other than the Eastern Cape were more likely to be holiday visitors than day visitors as with visitors from within the Eastern Cape.

More of these visitors from outside the Eastern Cape fell into the 31 – 44 age group rather than the 18 – 30 age group as with visitors from within the Eastern Cape.

The income levels of the visitors from outside the Eastern Cape was higher than those originating in the Eastern Cape, but both groups utilised the same attractions and activities.

4.3.2 Foreign Market Segments

The analysis of the foreign market segments is based on 85 foreign respondents and the survey sample for any particular country was all below 30 i.e. statistically to small.

However, based on the complete survey sample the typical foreign respondent can be described as:

- sex – male (62%)
- age – 45 – 55 (40%);
- income – >R151 000 (33/ 42)
- reason for visit – holiday (50/ 77)
- attractions – Restaurants (81%), beach (62%), cinema (51%) & Shopping Centres (49%)
- activities – Shows (14%) & Sport Events (11%)
- accommodation – Hotels (52%) and B&B (19%)

	UK	North America	Neighbouring Countries	Germany	France	Italy	Rest of Europe	Rest of Africa	Other Countries
Number	9	6	23	5	7	6	12	11	5
Sex	Female (88%)	Male (50%) Female (50%)	Male (70%)	Male (80%)	Male (100%)	Male (50%) Female (50%)	Male (66%)	Male (72%)	Female (60%)
Age	31 – 44 (56%)	31 – 44 (50%) 45 – 55 (50%)	18 – 30 (39%) 45 – 55 (30%)	45 – 55 (80%)	31 – 44 (43%)	45 – 55 (66%)	45 – 55 (66%)	18 – 30 (36%) 45 – 55 (27%)	31 – 44 (60%)
Income	>R151 000 (44%)	>R151 000 (66%)	>R151 000 (34%)	>R151 000 (60%)	>R151 000 (43%)	N/ A	>R151 000 (25%)	>R151 000 (55%)	>R151 000 (40%)
Reason for Visit	Holiday (88%)	Holiday (100%)	Holiday (39%)	Business (40%)	Holiday (86%)	Holiday (100%)	Holiday (42%)	Holiday (45%) Business (45%)	Holiday (80%)
Attractions	Beach Shopping Centres	Beach Restaurants	Cinema Restaurants Shopping Centres	Beach	Restaurants Cinema	Beach Restaurants	Restaurants Beach Shopping Centres	Restaurants Beach Shopping Centres	Restaurants Beach Cinema
Activities	None	Shows	Shows Sport Events	None	None	Fishing	Sport Events	Sport Events	Racing
Accommodation	Hotel (66%)	B & B (66%)	Hotel (52%)	Hotel (50%) B & B (50%)	Hotel (57%)	Hotel (83%)	Hotel (33%) B & B (25%)	Hotels (54%) VFR (36%)	Hotel (60%) B & B (40%)

4.3.3 Other Market Segments

Activities and Attractions

In order to aid in our analysis we have also segmented the survey results by activity or attraction visited in Buffalo City.

	Beach	EL Museum	Shopping Centres
Number	421	121	386
Origin	Eastern Cape (58%)	Eastern Cape (55%)	Eastern Cape (67%)
Race	White (48%) African (41%)	White (55%) African (39%)	White (49%) African (41%)
Sex	Male (54%)	Male (53%)	Male (56%)
Age	18 – 30 (33%) 31 – 44 (32%)	18 – 30 (33%)	18 – 30 (34%)
Income	>R151 000 (32%)	>R151 000 (41%)	>R151 000 (31%)
Reason for Visit	Holiday (36%)	Holiday (53%)	Day Visit (33%)

Based on the survey sample, most of the people that utilised the beach, the East London Museum and shopping centres originated from within the Eastern Cape. They were in the age group of 18 – 30 and in the upper income groups.

Reason for Visit

We have also analysed the results by reason for visit as shown in the table below and the most prominent point are highlighted.

- Except for holiday visitors, most visitors visiting for any other reason originate from within the Eastern Cape.
- The majority of conference visitors are between the ages of 31 and 44.
- As expected utilisation of hotels are higher amongst holiday visitors than any other type of visitor.

	Business	Holiday	VFR	Conference	Day Visit
Number	108	112	28	22	107
Origin	Eastern Cape (53%)	Foreign (45%)	Eastern Cape (57%)	Eastern Cape (27%) KwaZulu-Natal (27%)	Eastern Cape (92%)
Race	White (63%) African (32%)	White (52%) African (37%)	White (57%) African (39%)	White (41%) African (50%)	White (32%) African (53%)
Sex	Male (60%)	Male (56%)	Male (57%)	Male (55%)	Female (51%)
Age	18 – 30 (39%)	31 – 44 (34%)	18 – 30 (41%)	31 – 44 (68%)	18 – 30 (31%) 31 – 44 (30%)
Income	R25 – R50 000 (29%) >R151 000 (26%)	>R151 000 (53%)	<R25 000 (23%) R25 – R50 000 (23%) >R151 000 (23%)	R51 – R75 000 (47%)	R25 – R50 000 (20%)
Attractions	Restaurants 89 Cinema 64 Shopping 64	Beach 97 Restaurants 96 Cinema 77 Shopping 66	Shopping 21 Cinema 19 Restaurants 18	Beach 22 Restaurants 17 Shopping 11	Shopping 82 Beach 79 Restaurants 78 Cinema 63
Activities	Sport 39 Shows 28 Racing 25	Sport 33 Shows 33	Sport 14	Sport 5	Sport 62 Shows 29
Accommodation	Hotel 39	Hotel 70 B&B 25 VFR 14	VFR 10	Hotel 12	VFR 29 Hotel 20