

PROPOSAL AND METHODOLOGY

Approach

We will conduct the project in the following three phases:

Phase 1: Research and analysis

Phase 2: Tourism and Marketing Strategy development

Phase 3: Strategic recommendation on a proposed Tourism Structure

Phase 1: Research and Analysis

Phase 1 entails a national and regional market analysis of the positioning of Swellendam, which must include four surveys and a composite presentation of all the key findings and recommendations from the four surveys. The key elements must then be included in a strategy for Swellendam Tourism for the next 3 to 5 years.

Phase 1 will comprise of 4 separate surveys namely:

1. A survey of individuals, of people who have or will travel domestically in the last 12 months or the next 12 months.
2. A survey of companies/travel agents/tour operators who have or will recommend domestic travel in the last 12 months or the next 12 months.
3. A survey of publications on outdoor adventure, cycling running, etc or such publications and websites as may be deemed appropriate that have written on or commented on Swellendam in the last 12 months. The survey should also select the leading or top 5 travel sites/Facebook sites/Instagram accounts that drives or influences travel and tourism activities in SA.
4. A survey of local companies in travel, tourism or accommodation or business services that operate in Swellendam, Suurbraak and Barrydale and elsewhere. The survey results will be presented in a long format presentation with detailed analysis of what the respondents

As part of this Analysis and Research Phase we will obtain relevant documentation & secondary research, review components of the documentation that are relevant to tourism to ensure alignment between the tourism strategy & other relevant national/provincial/local strategies & plans. The documentation to be reviewed will include, inter alia:

- National strategies, policies & planning documents, e.g. the updated National Tourism Sector Strategy etc.
- SAT “We Do Tourism” marketing campaign
- Provincial strategies, policies & planning documents, e.g. Provincial Growth & Development Strategy • District Tourism and Tourism Strategies

- District & local strategies & plans, e.g. LED, IDP, SDF etc. The review & analysis of the documentation will be at a high level and only those elements that are relevant to Swellendam will be included in the report. Furthermore, we will review the marketing of tourism in the district by:
- Reviewing the marketing resources, strategy and plan & actual activities undertaken by the district
- Number & location of tourism information centres, opening hours etc.
- Review of current information distribution channels such as internet websites, attendance at tourism trade shows etc.
- Review of current promotional material, such as brochures, maps, advertising, etc.
- Review of tourism branding associated with the area • Use of events in tourism marketing

Survey 1: Target Market

The Stellenbosch University will conduct the target market survey and work with Destinate to ensure the best possible methodology and verify the research findings. The survey has to interview persons who have travelled and will travel to some locations in South Africa in the next 6 months. The aim is to determine who of the respondents have had or may be travelling to Swellendam in the next year.

We are approaching peak tourism season in South Africa, which is an ideal opportunity to conduct a market survey amongst domestic and international visitors. Although the Terms of Reference state that a randomly sampled survey has to be conducted among clients/families/individuals at travel and tourism shows in Johannesburg and Cape Town in order to investigate market behaviour, we would like to propose the following sites for interviews:

- a. OR Tambo International Airport and Cape Town International Airport in association with ACSA
- b. V&A Waterfront
- c. Kirstenbosch
- d. Table Mountain National Park
- e. Stellenbosch
- f. Hermanus
- g. Swellendam itself
- h. Getaway Show

Tourism shows, with the exception of the Getaway Show, are not the ideal platforms for target market surveys primarily aiming to attract those working in the tourism industry. Secondly, past experience has shown that conducting interviews at events such as tourism shows generally yield a low response rate. The Terms of Reference also states that “the purpose of the direct questioning of the market is to understand what the key drivers are in the decision making of local domestic tourist” [in general]. We are of the opinion that there is enough existing secondary data to provide insights into domestic tourism travel patterns (for e.g. SA Tourism domestic market surveys as well as Global Insight’s data).

We would target international visitors in South Africa who may or may not be planning a trip down the Garden Route as well as domestic visitors visiting the Western Cape during the December school holidays.

From a local market perspective, the target population would be travellers (residents from Greater Cape Town region which includes Wellington, Paarl, Stellenbosch, Hermanus and Franschhoek) to and within the Western Cape over peak season in 2018/2019. In addition, we suggest that a component of those surveyed to be visitors who are actually staying over in Swellendam during peak season. In this way one can gain knowledge on what has actually brought them to the town and not only on what they know about and if they intend travelling there in the future.

Sample Size

Sample size determination is the act of choosing the number of observations to include in a statistical sample. The sample size is an important feature of any empirical study in which the goal is to make inferences about a population from a sample. The key is to sample just enough people to assure confidence in the results, but no more. (Why waste money surveying more people than you need?). Above a certain sample size, the margin of error decreases only slightly, regardless of the size of the population. You can achieve the “95% sure that the margin of error is less than 5 percent” standard with a sample as small as 367 respondents from a population of 8 000 or 800 000 or even 8 000 000. Doubling the size of the sample (to 770 respondents) only reduces the margin of error by 1.38 percentage points. But, decreasing the margin of error, and increasing the level of confidence both require drawing a larger sample.

The ideal form of sampling, namely probability sampling (PS), generally uses a simple random or stratified sample approach. In PS every primary sampling unit (PSU) in the target population has a stated and equal chance of selection. If you want to make inferences about the whole population from which your sample is drawn it has to be by means of PS. I.e. PS means that the probability of each PSU in the population being chosen in the sample is known. However, in the absence of a pre-defined list of potential respondents such as surveys conducted at fairs, at airports, in the street, at malls or petrol stations are considered non-probability sampling (NPS). In NPS bias in selection occurs – NPS do not permit us to collect sample data from which to make inferences and statements about the total population from which the sample is drawn. In PS, a simple random sample means that each member of the population has an equal and known chance of being selected. On the contrary, the most commonly used NPS method is convenience sampling. This method is used in exploratory research where the researcher is interested in getting an inexpensive approximation of the truth. The sample participants are selected because they are convenient and easy to access, such as at airport lounges, petrol stations, etc. However, and especially in tourism related studies it is more often than not that a pseudo random sample (i.e. a pseudo PS method) be designed to yield statistically significant information that can within the context of survey sampling be justified as truly representative. This will have to be designed for the project.

Outcome

If your target population at a 95% confidence level with a margin of error of less than 5% - according to the sample size calculator (<https://www.surveysystem.com/sscalc.htm>) - is unknown¹, then the sample size has to be 384 interviews. The project therefore intends to complete 384 interviews among international visitors to the province and 384 among visitors from domestic visitors over the peak season of 2018/19. A concise secondary data summary on general domestic and international tourism patterns will also be provided in the report.

As part of the target market analysis, we will obtain, review and analyse the latest tourism research from agencies such as Stats SA, SAT, Wesgro etc on tourism in the Western Cape and specifically tourism in Swellendam, to determine the propensity of domestic and foreign tourists to visit the district and any changes in guest characteristics, visitation trends, information sources etc. We will also review and analyse available statistics and other pertinent data from studies in order to ascertain the trends in the tourism industry, especially regarding booking channels and information distribution in the district.

Survey 2: Travel Trade

The second survey focuses on the travel trade who is likely to recommend or have recommended Swellendam. We will create a database of South Africa's leading travel and trade agents, ensuring a good mix of established and niche operators and different size organisations, including independent operators. We have a good network of travel trade and will work with local and regional tourism organisations like Cape Town Tourism, Wesgro, Gauteng Tourism, Joburg Tourism and South African Tourism to ensure the database is comprehensive and a good reflection of the South African travel trade industry.

We will then design an online survey using Google forms and distribute the survey to all the trade on the database with a brief summary on the purpose of the survey as background. The survey will be designed in such a way that it is simple and quick to complete, encouraging a higher response rate. Destinate will conduct personalised follow-ups after two weeks and then again after a month with the trade who did not respond. E-surveys generally yield low responses, but we are confident that with the support of the relevant tourism authorities, with whom we all have very positive relationships, we will receive an adequate response from which to draw conclusions.

Survey 3: Print and Digital Media

The third survey will target print and digital publications including the leading outdoor adventure, cycling running, lifestyle and travel publications as well as websites and blog sites that are deemed appropriate and have perhaps written on or commented on Swellendam in the last 12 months.

We have a longstanding working relationship with BrandsEye, the world's leading opinion-data analysts. BrandsEye was founded by a group of data and computer scientists in 2007 to discover new and better ways to connect the voice of the public to decision makers. Today it combines artificial intelligence and crowd-sourced human intelligence to accurately mine social media for public opinion. In 2016, BrandsEye made international headlines when it found that the social media conversations they had mined pointed towards a Brexit victory for the Leave campaign and a Donald Trump victory in the US presidential elections. Their technology identifies the topics driving public sentiment, helping clients to understand not just how people feel, but what's making them feel that way.

BrandsEye also monitors traditional media channels like print, radio and television, offering clients a comprehensive across the line media monitoring service. The survey will select the leading or top 5 travel sites/Facebook sites/Instagram accounts that drives or influences travel and tourism activities in SA.

By understanding what is driving the sentiment, opinion data can be used to expose critical areas of strength and weakness. BrandsEye intends to mine all the online conversation relevant to Swellendam, and analyse that data to supply SM with business intelligence, used to empower decision-makers with an accurate understanding of the drivers behind public or consumer behaviour. Understanding customer sentiment is important, but understanding what issues and topics are driving a particular sentiment is crucial to making informed customer-centric changes. BrandsEye provides brands with the voice of the customer at a scale and accuracy that has previously remained unreachable.

Using its crowd capability, BrandsEye segment the conversation data into neutral, positive and negative data. The sentimentbearing (non-neutral) data will then be verified and tagged by the BrandsEye Crowd to surface relevant topics within the conversation.

Using this verified data, we will be able to

- build unlimited and real-time dashboards based on sentiment, volume, engagement, specific key words, organic and unique content (and many other metrics); and
- monitor and gain actionable opinion data from which to analyse and understand the challenges and opportunities that face Swellendam.
- understand the consumer sentiment towards Swellendam, and even deeper, understand the drivers behind why people feel the way they do.

Analyst report

Using the verified data, BrandsEye's analysts will compile a Retrospective Sentiment Report, in order to understand what the online conversation is about, and the messaging being sent out about Swellendam. In addition, the analyst will analyse sentiment over time to understand how positive or negative the conversation is, and what the drivers of that sentiment might have been.

Brandseye will also be able to bucket conversations into specific segments to understand how people speak about topics like biking, trail running, kayaking, or any other tourist-related activity that stems from the online conversation. Through the use of our metrics and features, we will also be able to surface the most influential authors about Swellendam as a tourist destination. Whether it be a local newspaper, a well-known travel website etc., we are able identify the authors that post most frequently, have the highest reach etc.

Stages of Delivery

1) PHASE 1 – ACCOUNT SETUP Define and load search terms Define and load online pages and profiles of interest (authorisation). Define final outcome and research questions Retrieve Historic data and verification process Create account infrastructure and wireframe OUTPUT: Basic account structure set up Confirmed project timeline and plan

2) PHASE 2 – INITIALISE CROWD VERIFICATION Run dataset through agreed crowd for sentiment verification Test and optimize based on output Review with client Run historic data through crowd structure

OUTPUT: Confirmed sentiment -verified data

3) DASHBOARD DESIGN & DEPLOYMENT BrandsEye analyst to set up initial dashboards Review dashboards Optimise and adapt data retrieval as per client feedback Setup notifications and alerts

OUTPUT: Usable dashboards matched to each stakeholder’s requirements.

4) REPORTING: Reporting brief kick-off with the analyst Define and scope the reporting output and data requirements Analyst to create a framework for 1. The Retrospective Sentiment Report, and 2. The Monthly Report. Client signoff on the agreed-upon reporting framework Analyst to complete and send report before the agreed-upon deadline

OUTPUT: The Retrospective Sentiment Report Monthly Reporting for the remainder of the contract.

Survey 4: Local Industry & Stakeholders

The fourth and final survey will focus on local companies in travel, tourism, accommodation and business services that operate in Swellendam, Suurbraak and Barrydale and a number of relevant tourism companies outside of Swellendam.

A comprehensive database will be developed in association with the Swellendam Municipality and a communication developed that provides the relevant background to the survey. The survey will test industry and business’ perception on Swellendam as a destination and brand.

Study area visit: We will visit the entire district to familiarise ourselves with the area’s overall appeal & attractiveness from a tourism perspective, including:

- Availability of existing and potential natural attractions
- Availability of existing and potential cultural & heritage resources
- Availability & standard of tourism packaging, tourism routes, and tourism information provision (tourism info offices).
- Availability & standard of existing and potential tourism products and services;
- High level assessment of the availability and standard of/lack of basic infrastructure (signage etc.), that may support or constrain tourism marketing and the development of tourism in the district

We will also conduct various stakeholder interviews during the study area visit

Key stakeholder interviews: During the study area visit, we will conduct interviews with selected stakeholders & key tourism industry businesses. This may include:

- District & local tourism officials & tourism organisations
- Key tourism industry operators in the district, e.g. accommodation establishments, tour operators, activity operators, conference venues, tourism attractions etc

Stakeholders will be questioned about:

- the existence of tourism marketing-related strategies, plans, policies & programmes
- the issues affecting tourism for the destination
- key trends in tourism markets coming to the destination
- the nature of any existing organisational structures and their roles, operating and reporting structures etc.
- linkages, both formal and informal between destination marketing organisations/stakeholder groupings
- their expectations in respect of destination marketing and the proposed tourism strategy
- their inputs in respect of possible key tourism marketing campaigns or programs for the area.
- Any other relevant issues that may assist in developing the tourism strategy

As part of this survey we will conduct two industry workshops or inspiration sessions, one in Swellendam and one in Barrydale. Facilitated by Destinate, we will use these sessions as an opportunity to engage the industry and business community face to face to get their direct input on the strategic direction for Swellendam and Brand Swellendam. As part of these sessions, we will ascertain perceptions on:

- branding and vision,
- effectiveness of current marketing initiatives,
- information channels,
- awareness of tourism products and experiences, and
- marketing focus and collaboration

The aim is to reach at least one hundred tourism and other local businesses in the region and engage face to face with a minimum of fifty stakeholders.

Presenting the Findings

The survey results will be evaluated in association with the University of Stellenbosch and a report with detailed analysis of the research findings along with strategic recommendations that will inform the strategy development will be presented in a long format presentation to the Swellendam Municipality.

Once the research findings have been presented to the Swellendam Municipality and the final report is concluded, it is proposed to facilitate an industry and stakeholder session where highlights of the research will be shared with stakeholders and their input obtained.

Consultation is an important part of the project deliverables and we propose at least three different opportunities to engage stakeholders during the project. It will ensure involvement, buy-in and transparency.

The research findings and input received from Swellendam Municipality and key stakeholders, which will include tourism, business and community representatives, will inform the Tourism Strategy development.

Phase 2: Tourism Strategy Development

A new Tourism Strategy for Swellendam is required to give strategic guidance to the Swellendam Municipality and the tourism sector to ensure that Swellendam's full tourism potential can be achieved, whilst adding to its appeal as a place to live for all its citizens. It is important that all relevant roleplayers, including the community, be consulted and recognised in the development and execution of the tourism strategy. A clear vision with mutually agreed strategic objectives and measurable targets will be defined to facilitate the sustainable and inclusive growth of tourism in the region.

The strategy will identify the region's key target markets that are aligned with the region's strongest assets to ensure a higher return on investment and targeted tourism growth that will achieve the best results for Swellendam and its people.

A three year business plan with a twelve-month action plan will provide guidance in terms of implementation and identify the short term deliverables that will achieve the maximum impact and ultimately convert greater awareness into tangible tourism growth for the region. The strategy will include a destination development plan, which will identify products and services that do not yet form part of the tourism value chain and will add to Swellendam's appeal as a destination.

In order to facilitate a destination development plan, a high-level review of existing tourism supply in the district, including accommodation establishments, attractions (e.g. nature, wildlife, heritage & culture), tour operators, trip/activity operators, conference & function venues, activities & tourism routes must be conducted. We will identify the broad product elements that comprise the destination & provide a high-level review of major attractions, products, facilities & activities in the district.

This will be based on the study area visit, a review of existing tourism information databases, relevant studies, websites, marketing material & any other secondary sources of information on tourism supply. Through this process we will identify events that take place or are proposed for the district (where relevant to the tourism sector) and identify planned tourism developments/investments in the district based on key stakeholder interactions.

The aim is for Swellendam to become a leading tourism destination in South Africa and for tourism to have a tangible and positive impact on the economic prosperity of the region.

Essentially the strategic process will:

- Allow for a strategic review.
- Establish a vision, growth targets and policy principles for future sustained tourism development in Swellendam.
- Identify a clear strategy for Swellendam to develop a competitive advantage and increase tourism growth in the medium to long term.
- Allow for engagement with key stakeholders including the tourism sector, business and community representatives for input and comment on the proposed strategy.
- Identify institutional and private sector financing arrangements to give effect to the strategy and the marketing plan in particular.
- Formulate a practical implementation plan with short-term interventions that will guide Swellendam Municipality and the tourism entity in the implementation of the strategy.

The strategy and the implementation plan will be informed by the research findings, the National and Provincial policy documents and strategies, and where possible, it will incorporate the LED Strategy. Adequate time will be allowed for face-to-face and electronic consultation with representatives from the Swellendam Municipality, the tourism sector, the business community and the community. It is crucial to allow for an inclusive process without allowing it to derail and delay the process; it will ensure local buy-in, ownership and accountability. Essentially, the new tourism strategy must be a strategy for and by Swellendam, but informed and guided by international best practice, global travel trends and strategic insight.

The tourism strategy will address four strategic areas namely:

1. Destination Marketing
2. Visitor Services and Information Management
3. Industry Relations and Membership
4. Local Tourism Development

The strategy and proposed business plan will be developed to achieve tangible and visible results in the short term with a solid foundation laid for long-term tourism marketing and development in Swellendam. The draft tourism strategy will be presented to the Swellendam Municipality to allow for input and comments before the final draft is presented for approval.

Phase 3: A Proposed Tourism Structure

A new tourism structure or delivery mechanism, capable of implementing the tourism strategy in an impactful and inclusive way needs to be created for Swellendam. It is important for structure to follow strategy, informed by key findings from the research, guided by international best practice and representative of the local tourism and business communities.

Without local buy-in and relevance the tourism structure will not be in a position to implement the strategy or take Swellendam's tourism sector forward.

The process will:

- Allow for a strategic review of the current and past structures against international best practice and latest developments in the tourism management arena. At least three case studies will be used in the assessment.
- Review alignment requirements related to the National Tourism Sector Strategy and Wesgro's tourism and marketing strategies
- Allow for engagement with key stakeholders including the tourism sector, business and community representatives. Allowance is made for a total of four industry/business/community engagement sessions of which at least one will be in Barrydale.
- Allow for a review of the most suitable entity type and structure with the appropriate governance and oversight mechanisms that will ensure delivery against the strategy, operational targets and budget.
- Propose a new inclusive industry programme with a proposed membership and participation structure as well as a commercial partnership model.
- Assess and propose an improved visitor services delivery mechanism including recommendations on the optimal use of technology and digital communications in the delivery of visitor information.
- Include a review of the region's tourism inclusivity to enable market readiness and market demand for the services or products. This will allow for a transitional period to create platforms for new and emerging products to participate.
- Present a recommended entity structure with an organisational design that includes the board, management and staffing structure as well as an implementation plan with proposed timelines.

The draft tourism entity structure will be presented to the Swellendam Municipality to allow for input and comments before the final draft is presented for approval.

Close out: Presenting the Strategy

Once Phase 3 has been successfully concluded we will present the final Tourism Strategy within the context of the research findings and international best practice case studies and trends to Swellendam Municipality. A comprehensive research paper with findings will be provided along with a proposal on the proposed new Tourism Entity for Swellendam.

Destinate will make ourselves available for a Council meeting or the required engagement to present the new Strategy to Council and its accountable representatives. Once Swellendam Municipality has approved the Strategy Destinate will avail us for a public presentation on the strategy during an industry event, providing strategic input on the way forward and how the industry can align with and benefit from the new strategy. This will ensure closure of the project and buy-in from the local tourism industry and business sector, setting the scene for a successful transition.

Ends