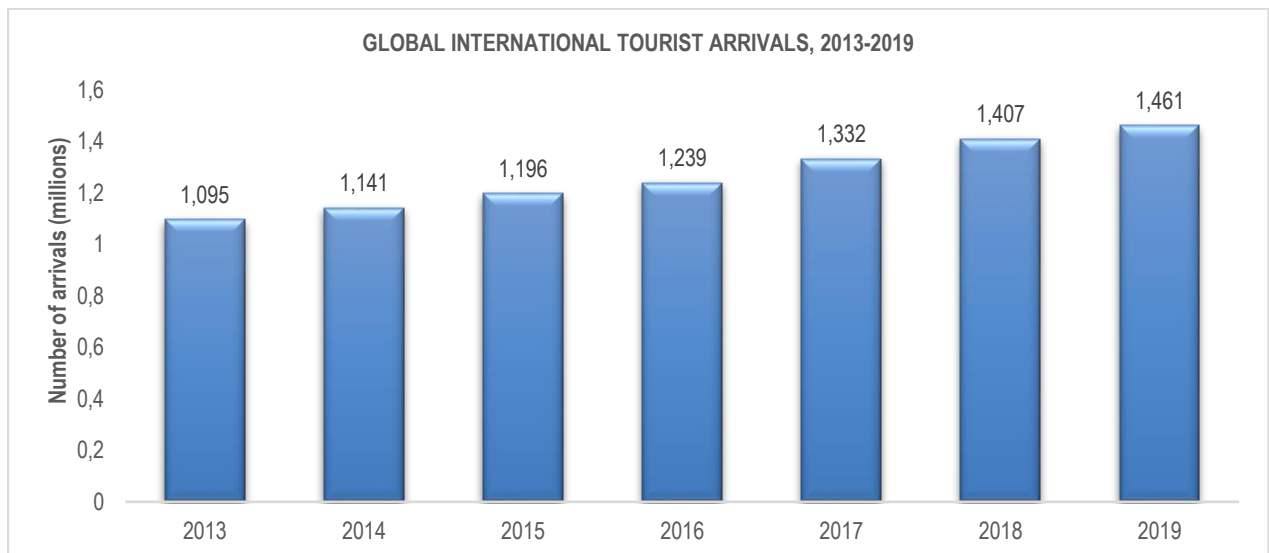


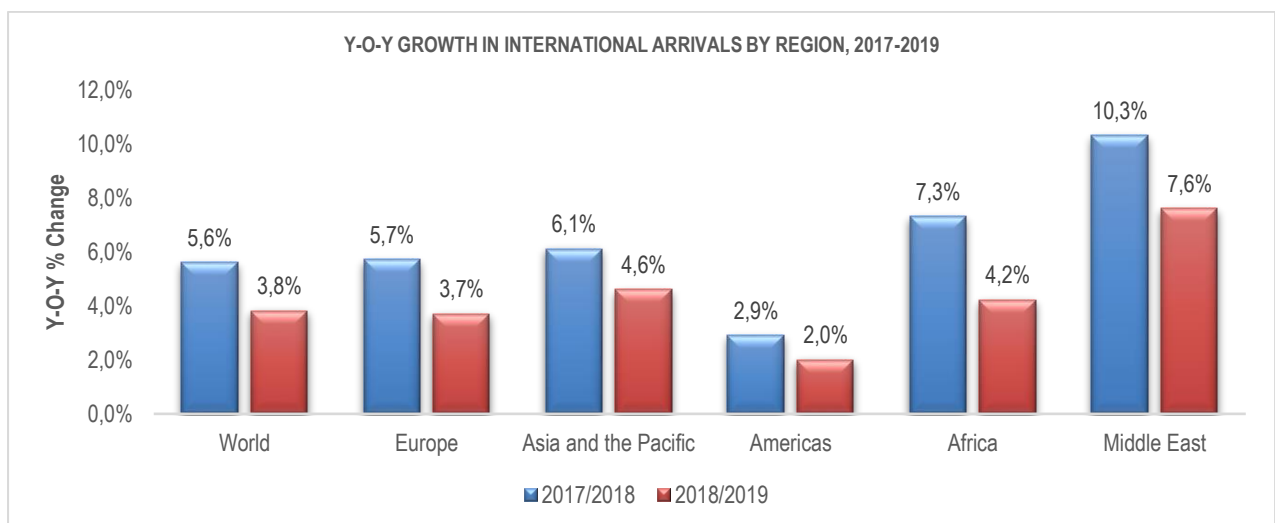
Western Cape Destination Performance Report: Annual 2019

1. Global Tourism Performance

- According to the January 2020 addition of the *United Nations World Tourism Barometer (UNWTO)*, global tourist arrivals grew by 4% in 2019. International tourist arrivals (overnight visitors) worldwide totalled 1.5 billion in that year.
- Although below the annual average of 5% growth over the last 10 years, tourism still outpaced global economic growth (+4% vs. +3%). By region, Middle East (+8%) and Asia and the Pacific (+5%) led growth, while arrivals to Africa and Europe both increased by 4%, in line with the world average growth. The Americas increased by 2% year-on-year.
- Environmental and economic challenges, trade tensions, rising geopolitical concerns, uncertainty about Brexit and the downfall of major travel group Thomas Cook and other low-cost airlines in Europe have weighed heavily on growth in international tourism.
- The World Travel & Tourism Council (WTTTC) reported that Travel & Tourism's direct, indirect and induced impact accounted for US\$ 8.9 trillion contribution to the world's GDP, which translates to 10.3% of global GDP.



Source: United Nations World Tourism Organisation, 2020



Source: United Nations World Tourism Organisation, 2020

2. South Africa: National Tourism Performance

2.1 International Trends

- Foreign tourist arrivals to South Africa reached 10.2 million in 2019, a decrease of -2.3% when compared to 2018. Visitor arrivals from all regions declined except for Middle East, Asia and South America.
- More than 70% of international trips to South Africa were taken from the rest of Africa. Visitor arrivals from this region declined by -2.4% compared to 2018. The attacks on foreign nationals that were prevalent in 2019 is cited as the main reason for the decline.
- The leading purpose of visiting South Africa was to visit friends and relatives. Other reasons for travelling to South Africa was for holiday and shopping. International tourists were particularly attracted by South Africa's good value for money, business investment interests, and safari and wildlife experience.
- 17.8% of the international market that visited South Africa were first time visitors, while 82.2% were repeat visitors. Around 57.4% of tourists are between the ages of 18 and 35 years (Millennials).

International Tourism Indicators	2017	2018	2019	18/19 y-o-y % change
Total number of tourist arrivals	10.3 million	10.5 million	10.2 million	-2.3%
Total foreign direct spend (excl capital expenditure) from tourists	R80.7 billion	R82.5 billion	R81.2 billion	-1.6%
Total number of bed nights spent by tourists	120.6 million	118.1 million	112.3 million	-5.0%
Average spend in South Africa per foreign tourist	R8,400	R8,300	R8,300	0.6%
Average length of stay of tourists visiting South Africa	12.2 nights	11.7 nights	11.4 nights	-2.2%

Source: SA Tourism, 2020

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2.2 Domestic Trends

- Despite unfavourable economic conditions, travel within the country's borders reached a total of 28.5 million trips in 2019. South African Tourism's marketing strategy which aims to build a culture of travel amongst South Africans as well as deal driven campaigns by the industry and SA Tourism are cited as the reasons behind the significant growth in domestic tourism.
- Visiting friends and relatives (VFR) ranked as the top reason for domestic travel to South Africa and accounted for 15 million of total domestic trips. Gauteng, Kwazulu-Natal and the Western Cape ranked as the top source provinces in 2019, with Gauteng leading as the most preferred province to visit amongst domestic travellers.
- The duration of domestic trips were on average 3.3 nights in 2019, resulting in a total of 94.1 million bed nights. The total revenue generated by the domestic market reached R43.9 billion in 2019. Domestic tourists average spend also increased to R1,542, compared to the R1,497 spent in 2018.

Domestic Tourism Indicators	2017	2018	2019	18/19 y-o-y % change
Total Domestic Trips	17.2 million	17.7 million	28.5 million	61.3%
Total Direct Domestic Spend	R22.1 billion	R26.4 billion	R43.9 billion	66.3%
Average Spend per Domestic Trip	R1,280	R1,497	R1,542	3.0%
Average Nights per Domestic Trip	4.1 nights	3.9 nights	3.3 nights	-15.7%
Total Annual Domestic Bednights	70.1 million	69.3 million	94.1 million	35.9%

Source: SA Tourism, 2020

3 Provincial Tourism Performance

Of all nine provinces, the Western Cape ranked:

- **TOP** in Total Foreign Direct Spend: R24.2 billion
- **TOP** in the average length of stay: 13.4 nights
- **2nd Highest** in total bed nights: 25.7 million
- **3rd Highest** in tourist arrivals: 2.0 million

PROVINCIAL TOURISM PERFORMANCE, 2019				
Province	International Tourist Arrivals (millions)	Total Foreign Direct Spend (billions)	Bed nights (millions)	Length of stay (nights)
Gauteng	3.5	R23.7	34.5	11.0
Limpopo	2.3	R7.5	7.7	3.6
Western Cape	2.0	R24.2	25.7	13.4
Mpumalanga	1.7	R7.4	16.7	10.2
Free State	1.1	R3.1	11.4	11.4
KwaZulu-Natal	0.8	R6.4	7.5	9.7
North West	0.6	R2.9	3.7	6.3
Eastern Cape	0.4	R5.2	4.2	10.5
Northern Cape	0.1	R0.8	0.8	7.0

Source: SA Tourism, 2020

4 Western Cape Tourism Performance

The Western Cape accounted for 19.6% of all international tourist arrivals to South Africa and received 22.9% of South Africa's tourist's spend. In addition, the Western Cape held 22.9% of South Africa's bed nights recorded during the period.

The Western Cape held the following share of South African tourists during 2019:

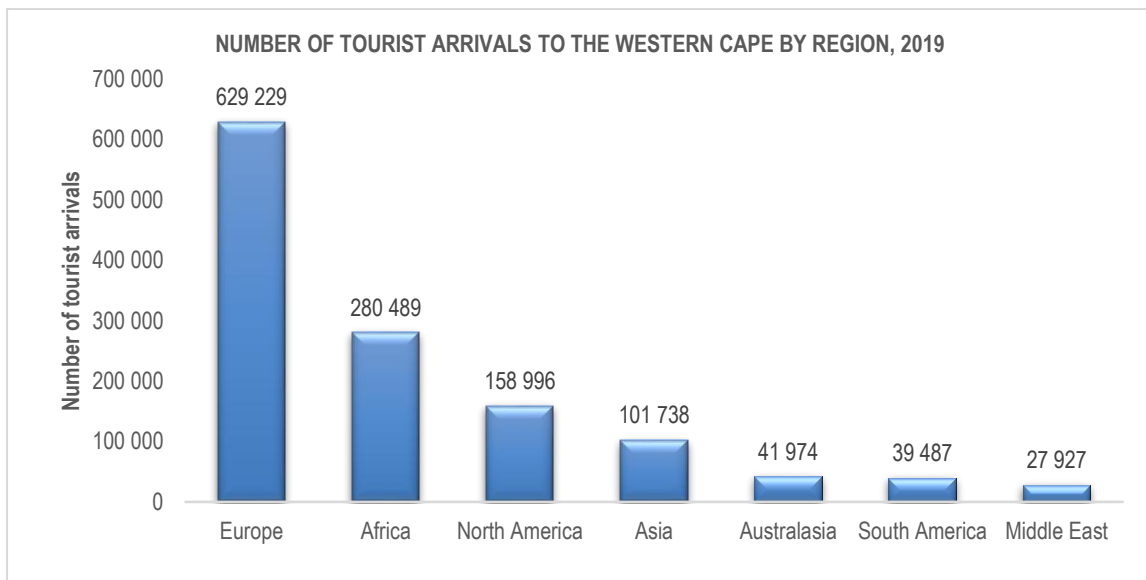
- Western Cape's share of **Africa** tourists visiting South Africa 3.7%
- Western Cape's share of **Middle East** tourists visiting South Africa 39.3%
- Western Cape's share of **South America** tourists visiting South Africa 32.8%
- Western Cape's share of **North America** tourists visiting South Africa 36.1%
- Western Cape's share of **Asia** tourists visiting South Africa 32.7%
- Western Cape's share of **Australasia** tourists visiting South Africa 32.8%
- Western Cape's share of **European** tourists visiting South Africa 40.4%

Western Cape Performance Indicators	2016	2017	2018	2019	18/19 % Change
International					
Total number of tourist arrivals	1,6 million	1,7 million	1,7 million	2,0 million	16.0%
% Share of South Africa's arrivals	15.6%	16.8%	16.5%	19.6%	-
Total foreign direct spend (excl capital expenditure)	R18.1 billion	R23.1 billion	R16.3 billion	R18.6 billion	14.1%
% Share of South Africa's spend	23.9%	28.6%	19.8%	22.9%	-
Total number of bed nights spent by tourists	16,7 million	23,3 million	23,3 million	25,7 million	10.2%
% Share of South Africa's bed nights	18.9%	19.3%	19.7%	22.9%	-
Length of stay	11.1 nights	14.1 nights	13.9 nights	13.4 nights	3.9%
Domestic					
Total domestic trips	2,139,000	1,587,000	1,288,000	4,431,140	244%
Total direct domestic spend	R2.5 billion	R1.6 billion	R1.9 billion	R7.7 billion	315%
Total annual domestic bed nights	10,160,600	5,270,516	4,885,441	16,647,773	241%
Length of stay	4.9 nights	3.4 nights	3.8 nights	3.8 nights	-

Source: SA Tourism, 2020

4.1 Tourist Arrivals

- Europe maintained its position as the Western Cape's top region with respect to tourism volume, accounting for nearly 50% of tourists to the region in 2019. Four out of the top ten source markets to the Western Cape originated from Europe. The United Kingdom and Germany consecutively ranked as the top European source markets across the last three years.
- The rest of Africa (22%) ranked as the second largest contributor to tourism volume in the Western Cape. Namibia led as the top source market from the African region, recording over 70,000 tourists in 2019.
- The United States led travel from North America and accounted for 84.6% of tourists from the region. The largest (65.4%) proportion of South American tourists originated from Brazil.
- In 2019, China (incl. Hong Kong) ranked as the Western Cape's seventh largest source market and recorded the highest (47.3%) year-on-year growth in tourist arrivals. The Western Cape welcomed a share of 46.8% of South Africa's Chinese travellers, ranking as the most popular province amongst the Chinese.



Source: SA Tourism, 2020

4.2 Top 10 Source Markets

According to South African Tourism latest annual 2019 data, all source markets to the Western Cape increased in 2019, with the exception of Germany (-0.3%), Namibia (-17.0%), and France (-2.9%).

TOP 10 SOURCE MARKETS TO THE WESTERN CAPE, 2017-2019					
Ranking	Markets	2017	2018	2019	18/19 % Change
1	United Kingdom	259 188	173,847	194,900	12.1%
2	United States	192 465	122,579	134,561	9.8%
3	Germany	210 699	129,630	129,248	-0.3%
4	Namibia	120 477	90,070	74,734	-17.0%
5	France	98 978	64,258	62,404	-2.9%
6	Netherlands	86,527	50,401	51,480	2.1%
7	China (Incl Hong Kong)	36 710	29,729	43,778	47.3%
8	Zimbabwe	44 945	33,705	39,166	16.2%
9	Australia	54 791	34,233	36,490	6.6%
10	Lesotho	23 876	28,987	32,077	10.7%

Source: SA Tourism, 2020

4.3 International Traveller Trends: Tourist Arrivals to the Western Cape

International Traveller Trends of Tourists to Western Cape: 2019	% of Tourists
Top 3 Reasons for Visiting	Holiday 61.5% VFR 16.8% MICE 8.4%
Repeat Travel	First time 57.8% 2-3 times 15.3% 10 times or more 12.2%
Top Age Groups	25-34 years 33.0% 35-44 years 16.6% 18-24 years 15.6%
Travel Party	Alone 39.1% Spouse/partner 33.9% Family/children over 18 11.1%

Source: SA Tourism, 2020

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