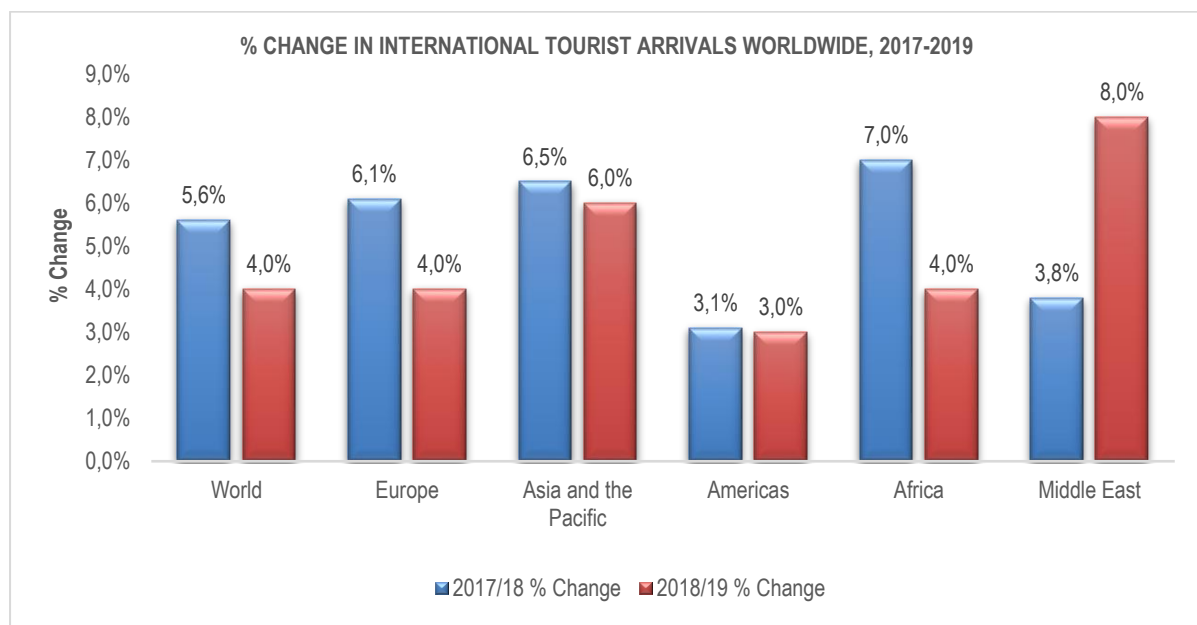


## Western Cape Destination Performance Report: Q1 2019

### 1. Global Tourism Performance

- According to the May 2019 addition of the *United Nations World Tourism Barometer (UNWTO)*, international tourist arrival (overnight visitors) grew by 4% between January and March 2019.
- The period under review represents around 20% of the yearly total and includes the winter season in the northern hemisphere, the summer season in the southern hemisphere and the Chinese New Year, among many other events.
- Growth in arrivals were led by the Middle East (+8.0%) and Asia and the Pacific (+6.0%). Europe, Africa (both grew at 4.0%) and the Americas (+3.0%) also recorded a positive increase in arrivals.
- Across the first three months of 2019 China continued to drive outbound travel. ForwardKeys booking data indicated a 17% increase in air travel bookings from China to the EU across the first three months of 2019, and a 9% increase in bookings to other destinations worldwide.



Source: United Nations World Tourism Organisation, 2019

### 2. South Africa: National Tourism Performance

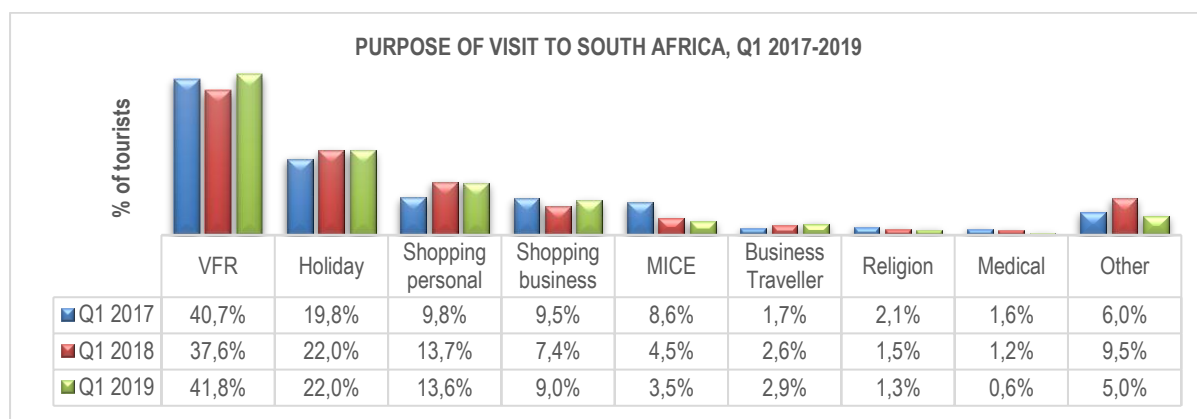
#### 2.1 International Trends

- Foreign tourist arrivals reached 2.7 million in the first quarter of 2019 and accounted for 36% of total tourism trips to South Africa. The foreign market to South Africa decreased by 3.0% when compared to the same period of 2018.
- Over 2 million tourism trips to South Africa were taken from Africa. Zimbabwe (7.4%), Mozambique (3.7%) and Malawi (1.7%) were the only land markets from this region reflecting a positive increase in tourist arrivals.
- The leading purpose of visiting South Africa was to visit friends and relatives and this market increased to 41.8% during Q1 2019. Other reasons for travelling to South Africa was for holiday and shopping. The key reason for holiday travel was to experience a different country, diversity of attractions and a warm climate.
- 16.4% of the international market that visited South Africa were first time visitors, while 83.6% were repeat visitors. Around 59.6% of international tourists that visited South Africa during Q1 2019 were younger than 35 years old (Millennials).

International Tourism Indicators	Q1 2016	Q1 2017	Q1 2018	Q1 2019	18/19 y-o-y % change
Total number of tourist arrivals	2.7 million	2.6 million	2.8 million	2.7 million	-3.0%
Total foreign direct spend (excl capital expenditure) from tourists	R22.5 billion	R19.0 billion	R20.7 billion	25.7 billion	24.1%
Total number of bed nights spent by tourists	26.2 million	25.8 million	29.4 million	29.2 million	-0.5%
Average spend in South Africa per foreign tourist	R9,000	R7,800	R7,900	R9,900	25.3%
Average length of stay of tourists visiting South Africa	10.0 nights	10.2 nights	10.9 nights	11.2 nights	2.5%

Source: SA Tourism, 2019

### 2.1.1 International Tourist Arrivals: Purpose of visit



Source: SA Tourism, 2019

## 2.2 Domestic Trends

- During Q1 2019, the domestic tourism market continued to drive tourism volume to South Africa, reaching a total of 4.8 million trips and growing by 27.2% year-on-year.
- Visiting friends and relatives (VFR) ranked as the top reason for domestic travel to South Africa and accounted for 64% of total domestic trips taken in Q1 2019. Gauteng ranked as the top source province from where domestic trips were taken from, this can largely be attributed to the population distribution as Gauteng is the most populous province in South Africa. Over 1.2 million trips taken during the period were to Limpopo, ranking as the most preferred province for domestic travel. Domestic trips to the Western Cape reached 504,811 during Q1 2019 and grew by 113% year-on-year.
- The duration of domestic trips were on average 3.8 nights, resulting in a total of 18.5 million bed nights. The total revenue generated by the domestic market reached R8.2 billion and grew by 64.0% year-on-year. Domestic tourists average spend also increased to R1,690, compared to the R1,310 spent during the same period in 2018.

Domestic Tourism Indicators	Q1 2016	Q1 2017	Q1 2018	Q1 2019	18/19 y-o-y % change
Total Domestic Trips	7.3 million	4.4 million	3.8 million	4.8 million	27.2%
Total Domestic Spend	R8.8 billion	R5.4 billion	R5.0 billion	R8.2 billion	64.0%
Average Spend per Domestic Tourist	R1,210	R1,220	R1,310	R1,690	29.0%
Average Nights per Domestic Trip	3.6 nights	3.4 nights	3.3 nights	3.8 nights	16.0%
Total Annual Domestic Bednights	26.0 million	14.9 million	12.4 million	18.5 million	49.2%

Source: SA Tourism, 2019

### 3 Provincial Tourism Performance

PROVINCIAL TOURISM PERFORMANCE, Q1 2019				
Province	International Tourist Arrivals (000)	Total Foreign Direct Spend (R billions)	Bed nights (millions)	Length of stay (nights)
Gauteng	939,100	R7.6	11.9	13.2
Limpopo	602,800	R1.8	2.8	4.9
Western Cape	487,666	R5.3	8.3	17.7
Mpumalanga	442,700	R3.6	5.6	13.2
Free State	280,800	R2.1	3.3	12.4
KwaZulu-Natal	207,300	R2.2	3.3	17.0
North West	151,700	R1.2	1.8	12.7
Eastern Cape	112,800	R1.6	2.4	22.5
Northern Cape	19,900	R0.2	0.3	18.3

Source: SA Tourism, 2019

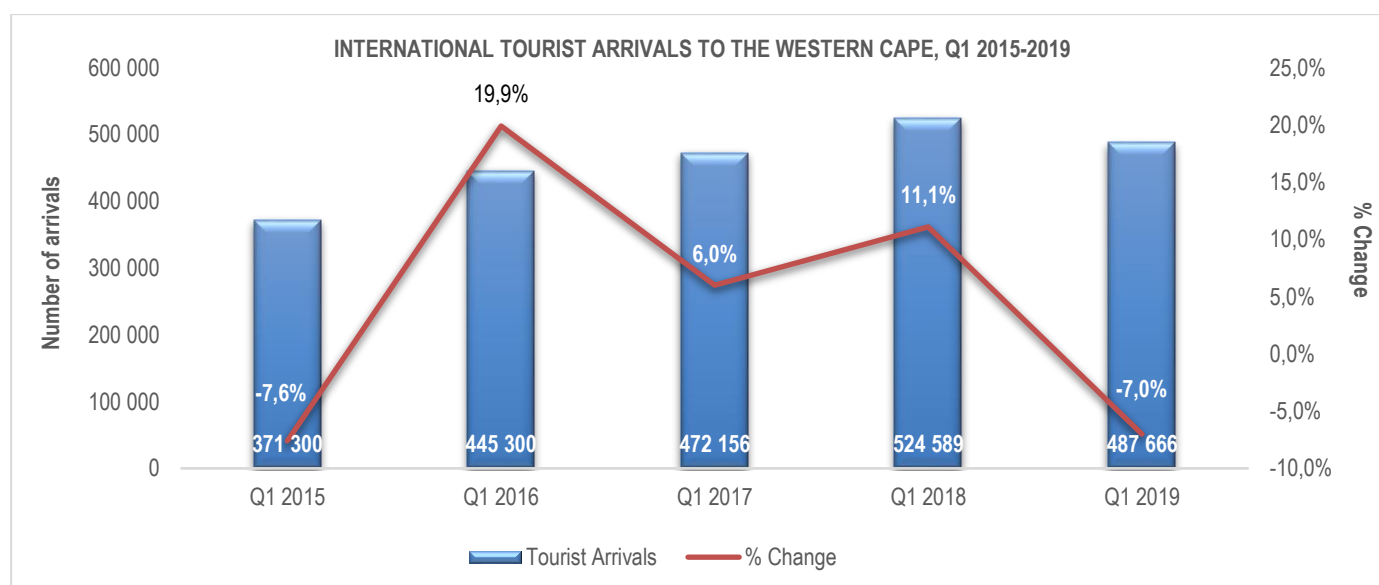
### 4 Western Cape Tourism Performance

The Western Cape accounted for 18.0% of all international tourist arrivals to South Africa and received 20.6% of South Africa's tourist's spend. In addition, the Western Cape held 28.4% of South Africa's bed nights recorded during the period.

The Western Cape held the following share of South African tourists during Q1 2019:

- Western Cape's share of **Africa** tourists visiting South Africa 3.4%
- Western Cape's share of **Middle East** tourists visiting South Africa 46.4%
- Western Cape's share of **Central & South America** tourists visiting South Africa 67.8%
- Western Cape's share of **North America** tourists visiting South Africa 55.8%
- Western Cape's share of **Asia** tourists visiting South Africa 39.7%
- Western Cape's share of **Australasia** tourists visiting South Africa 47.2%
- Western Cape's share of **European** tourists visiting South Africa 62.7%

3



Source: SA Tourism, 2019

## 4.1 Tourist Arrivals

- Europe maintained its position as the Western Cape's top region with respect to tourism volume, reaching a total of 293,520 tourists during Q1 2019. Five out of the top ten source markets to the Western Cape originated from Europe. The United Kingdom and Germany consecutively ranked as the top source markets across the last five years. The highest growth in tourist arrivals also originated from Europe; with double digit growth rates from Sweden (36.8%), the United Kingdom (32.6%) and Germany (24.9%).
- Africa ranked as the second largest contributor to tourism volume in the Western Cape. Namibia led as the top source market from the African region, ranking in 6<sup>th</sup> position amongst the top 10 source markets to the Western Cape.
- The United States led travel from North America, accounting for over 45,000 tourists and ranking as the Western Cape's third largest international market. The largest (60.0%) proportion of South American tourists originated from Brazil.



Source: SA Tourism, 2019

## 4.2 Top 10 Source Markets

TOP 10 SOURCE MARKETS TO THE WESTERN CAPE, Q1 2017-2019				
Ranking	Markets	Q1 2018	Q1 2019	Q1 18/19 % Change
1	United Kingdom	67,000	88,000	32.6%
2	Germany	57,000	71,000	24.9%
3	United States	51,000	45,000	-12.0%
4	France	27,000	28,000	4.3%
5	Netherlands	21,000	22,000	6.1%
6	Namibia	28,000	21,000	-23.9%
7	Brazil	12,000	13,000	5.1%
8	Canada	10,000	12,000	18.9%
9	China Incl. Hong Kong	15,000	12,000	-22.7%
10	Sweden	8,000	12,000	36.8%

Source: SA Tourism, 2019