

Executive Summary

This destination sector fact sheet provides key trade, investment and tourism related statistics for the West Coast. Specifically, it shows the West Coast's employment, trade and investment trends. The key highlights are provided below:

Economy

The Saldanha Bay Industrial Development Zone (SBIDZ) was officially launched at Saldanha Bay on South Africa's south-western coast on 31 October 2013. The SBIDZ is the first Special Economic Zone (SEZ) to be located within a port and is the only sector-specific SEZ in South Africa catering, specifically, for the oil and gas, maritime fabrication and repair industries and related support services.

The West Coast's real GDP at basic prices was estimated at R19.19 million in 2019. Saldanha Bay, which is a local municipality in the West Coast district with a GVA of R5.88 million in 2019, made the largest contribution to the district's GVA. The top three industries that made the largest contribution to the West Coast's GVA, between 2015 and 2019, were manufacturing; agriculture, fishing and forestry; and wholesale and retail trade, catering and accommodation.

Trade

The trade balance of the West Coast has remained positive over the past decade. The district's trade balance was R3.36 million in 2019. The value of total exports declined by 19.97% between 2018 and 2019. Similarly, total imports decreased from R3.54 million in 2018 to R3.04 million in 2019. Flat-rolled products of iron or non-alloyed steel which is not clad, plated or coated are the district's top exported products.

Investment

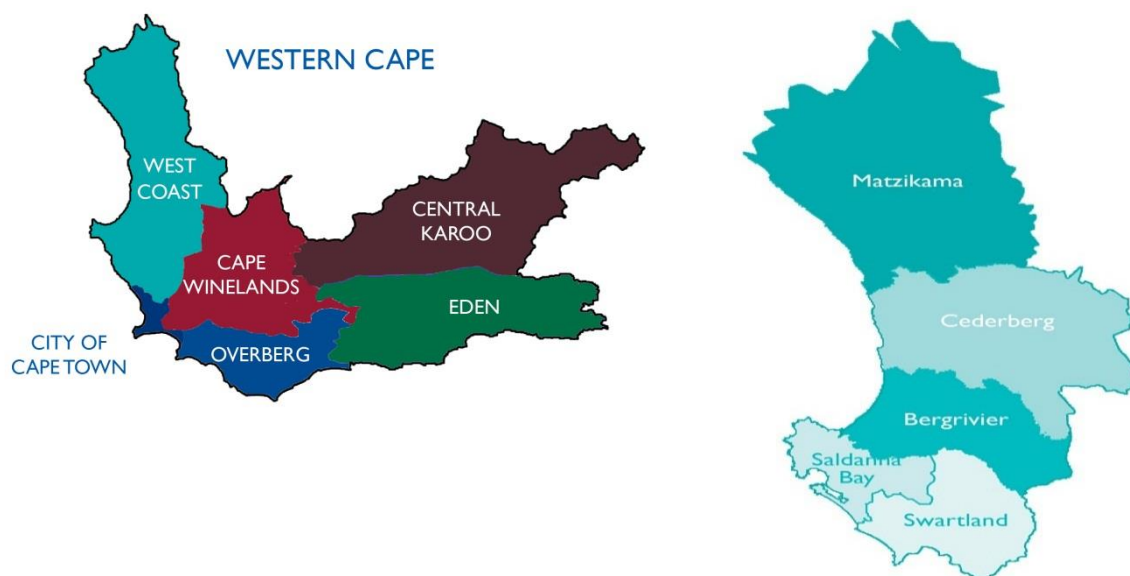
Between January 2003 and December 2019, two FDI projects, with an estimated value of R592.67 million, were recorded in the West Coast district. These two projects, which originated from Germany and Luxembourg, created a total of 1 504 jobs for the district.

Tourism

A majority of international visitors to the West Coast are Europeans. In 2019, Germany, the United Kingdom and the Netherlands ranked as the top three countries whose nationals visited the West Coast. Domestic visitors accounted for about 77.3% of people who visited the region in 2019. The top three domestic markets were the Western Cape, Gauteng and Mpumalanga.

1. Area

The West Coast (Weskus) is a district in the Western Cape that can be found on the western coastline of South Africa along the Atlantic Ocean. It is situated on 31,101km² of land. The district is bordered by the Namakwa District Municipality in the Northern Cape Province to the north and northeast, by the Cape Winelands District Municipality to the southeast, and the City of Cape Town to the south. The district is divided into five local municipalities, namely, Matzikama, Cederberg, Bergrivier, Saldanha Bay and Swartland.



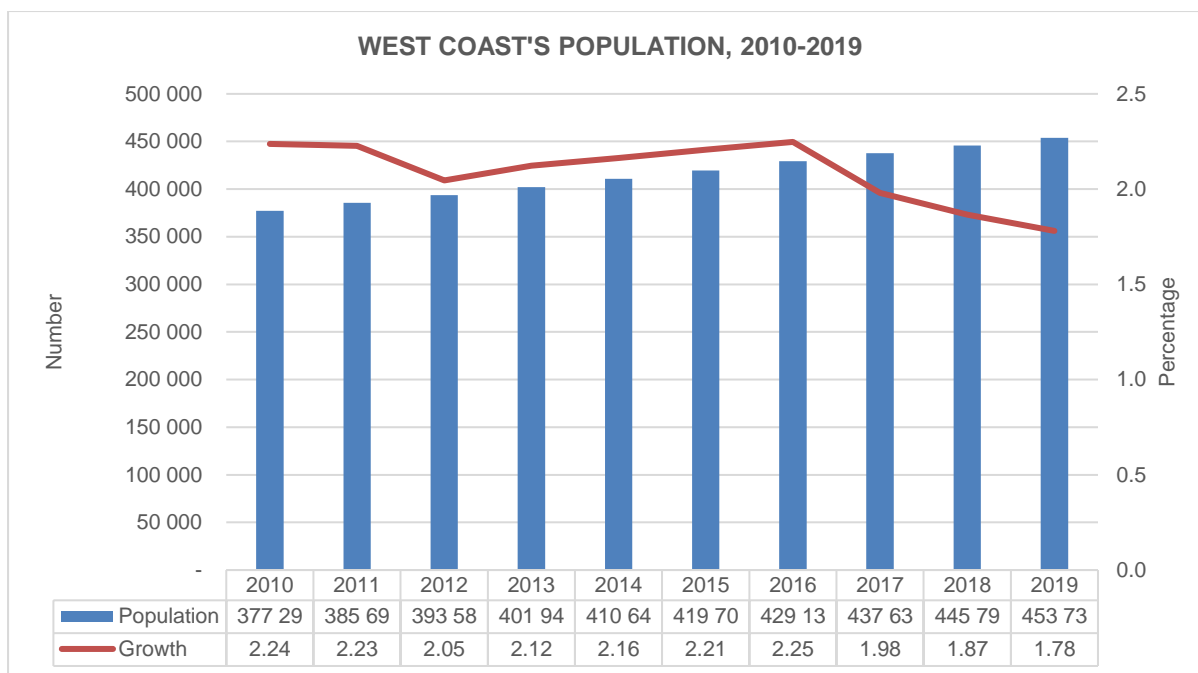
2. General Information

WEST COAST KEY INDICATORS	
Executive Mayor	Alderman JH Cleophas
Population (2019)	453 734
GDP at basic prices (2019)	ZAR19.19bn
Unemployment (2019)	11.89%
Literacy rate [20+ years] (2019)	72.42%
Ethnic groups (2019)	Coloureds (68.75%), African Black (18.53%), Whites (12.19%) and Indian or Asians (0.54%)
Gini Coefficient (2018)	0.59
Human Development Index (2018)	0.78

Source: Quantec, 2020; West Coast District, 2020

2.1 Demographics

The West Coast district is the fourth largest district, by population size, in the Western Cape (accounting for 6.63% of the province's population). The population of the West Coast has been growing at an average growth rate of 2%. The district's population increased from 419 700 in 2015 to 453 734 in 2019. It is estimated that the population of the West Coast will increase to 530 860 by 2024 (West Coast Integrated Development Plan, 2019).



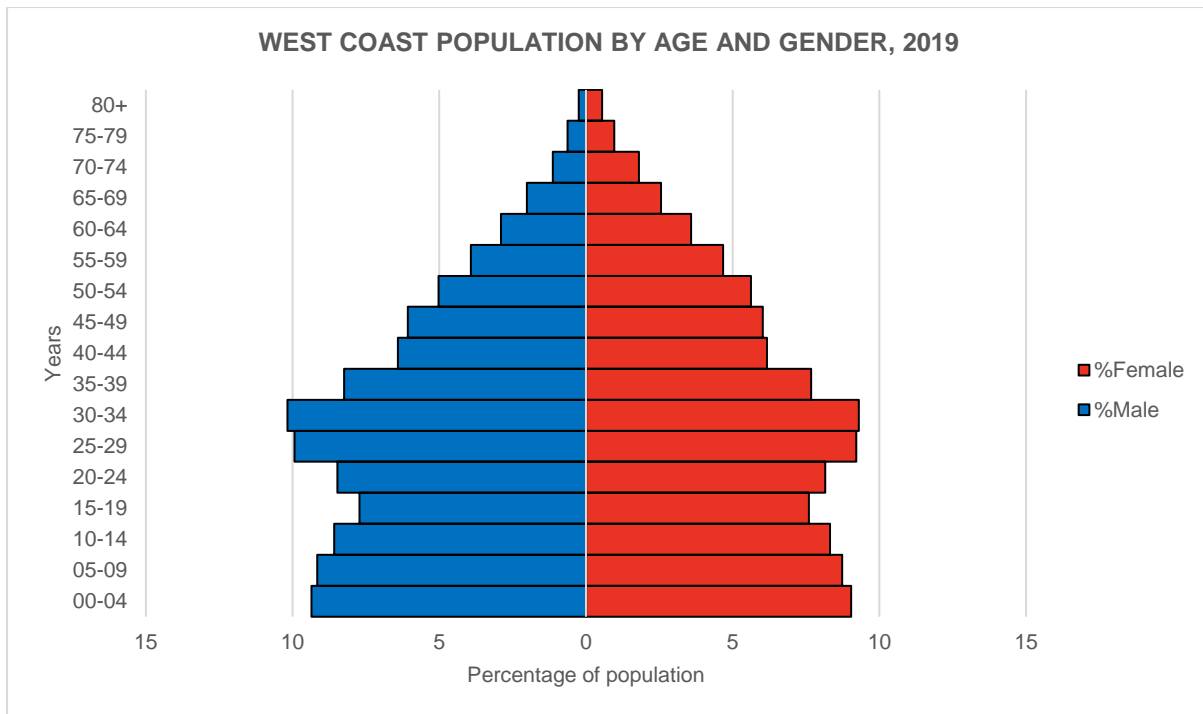
Source: Quantec, 2020

The table below shows the West Coast's population breakdown by ethnic groups. In 2019, the Coloured population constituted the largest ethnic group, accounting for 68.75% of the total population, followed by the Black African and the White population groups, representing 18.53% and 12.19%, respectively.

WEST COAST'S POPULATION BREAKDOWN BY GROUP, 2019				
GROUP	2018	2019	% SHARE 2019	% GROWTH RATE, 2018 -2019
Coloured	306 276	311 950	68.75	1.85
Black African	81 489	84 057	18.53	3.15
White	55 687	55 294	12.19	-0.71
Indian/Asian	2 344	2 433	0.54	3.78
TOTAL	445 796	453 734	100	1.78

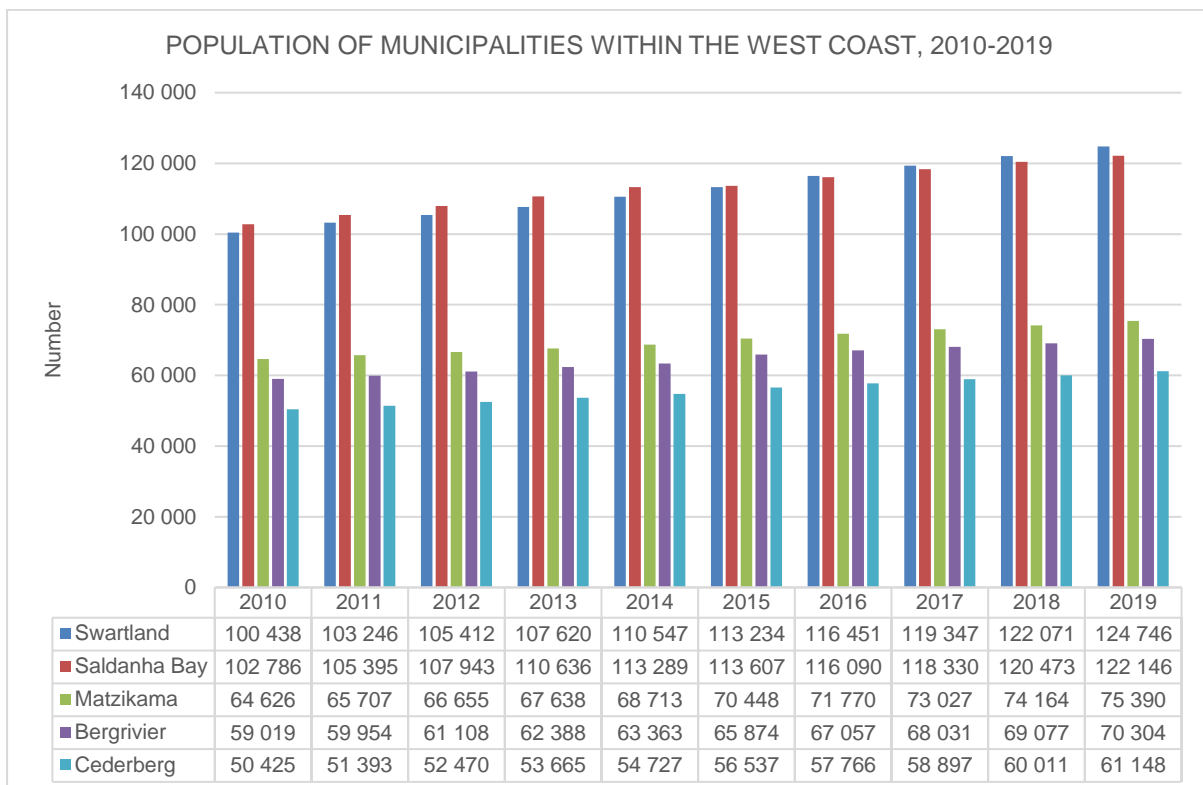
Source: Quantec, 2020

The figure below shows the West Coast's district population distribution for the period 2019. The district is home to 453 734 people of whom 49.5% are male and 50.5% are female. The shape of the pyramid is an indication that the district has a relatively young population. About 26.6% of the population are young dependents (0-14 years). The district has a large economically active group (68.4%), particularly those within the ages of 25 to 34 years.



Source: Quantec, 2020

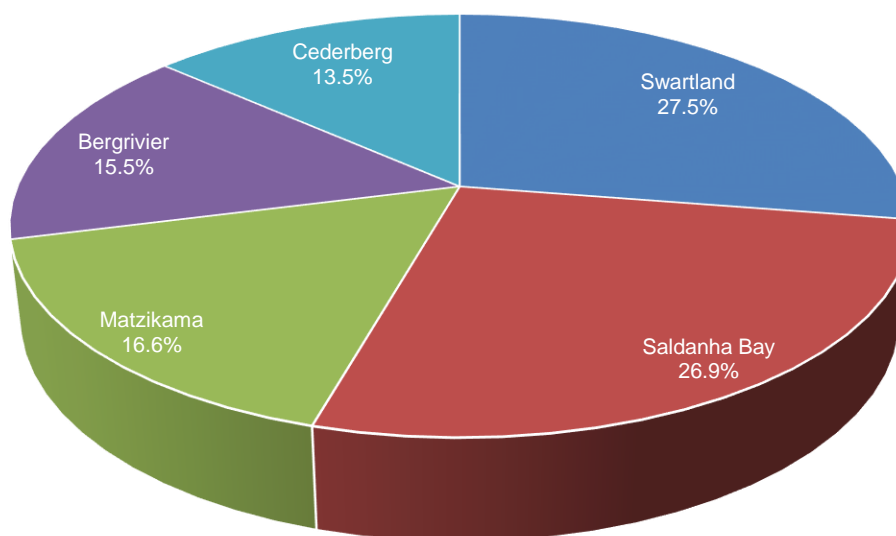
Until 2015, the Saldanha Bay municipality had the highest population in the West Coast district. The Swartland municipality currently has the highest population (124 746 people in 2019) in the West Coast, followed by Saldanha Bay and Matzikama with a population of 122 146 and 75 390, respectively.



Source: Quantec, 2020

As shown in the figure below, the Swartland local municipality accounted for about 27.5% of the population of the West Coast in 2019 whereas Cederberg had the lowest share of approximately 13.5%.

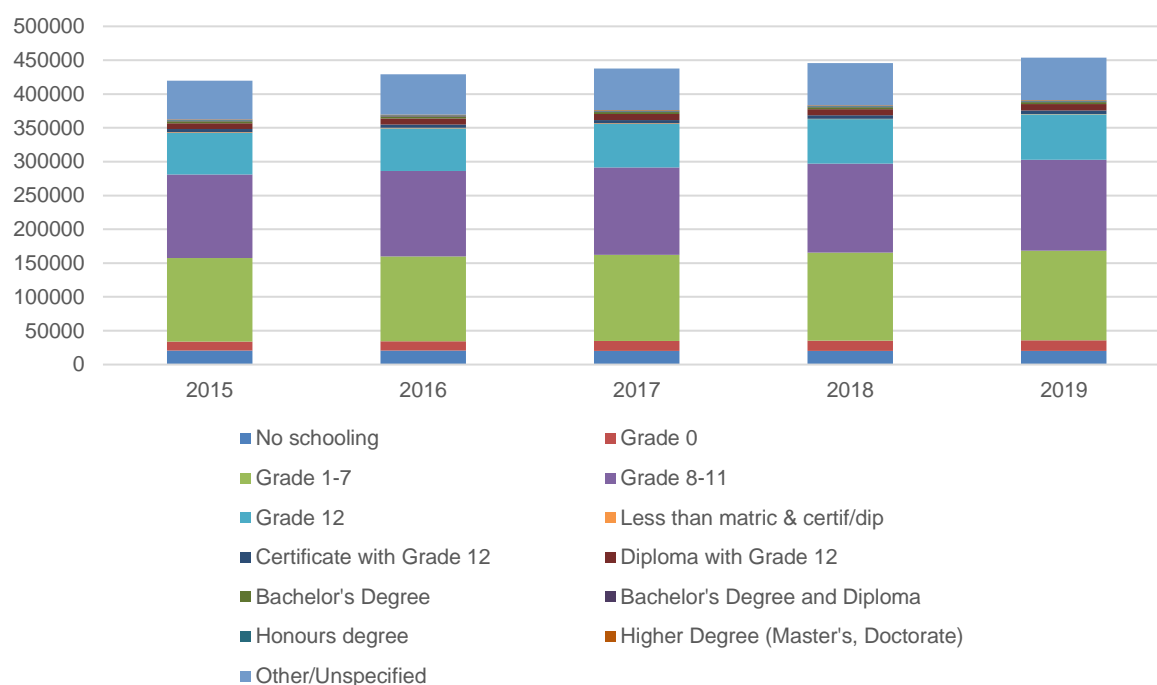
POPULATION BY MUNICIPALITY, 2019



Source: Quantec, 2020

The figure below shows the level of education among the population of the West Coast. The majority of the population have primary and secondary education. Moreover, the number of people with tertiary qualifications has increased between 2015 and 2019. For instance, the number of people in possession of bachelor's degree increased from 2 655 in 2015 to 2 821 in 2019.

LEVEL OF EDUCATION AMONG WEST COAST'S POPULATION, 2015-2019



Source: Quantec, 2020

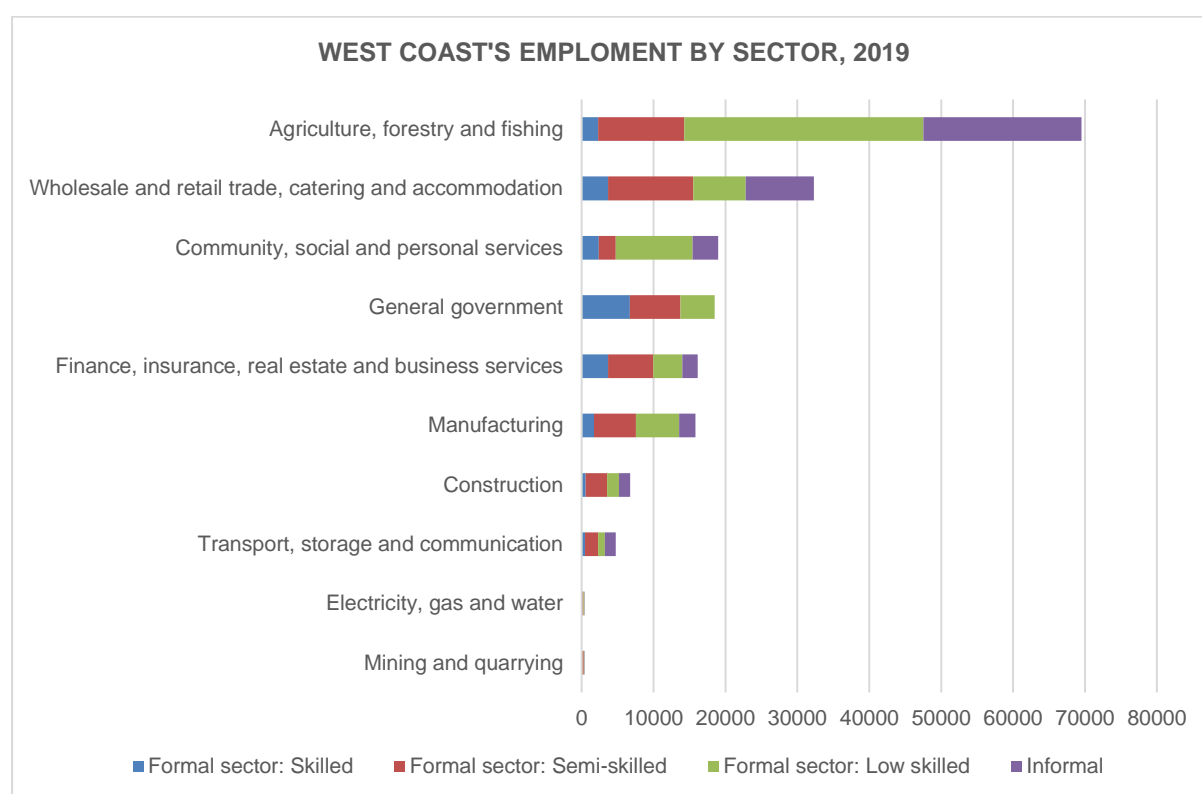
2.2 Employment

The table below provides a snapshot of the 2019 labour market indicators for the West Coast district. Out of a working age population of 310 549 people, 183 580 were employed while 102 188 were not economically active. The labour force participation and absorption rates were 67.09% and 59.11% respectively whereas 11.89% of the population were unemployed.

LABOUR MARKET INDICATORS FOR THE WEST COAST, 2019	
Working age population (Number)	310 549
Employed (Number)	183 580
Unemployed (Number)	24 781
Not economically active (Number)	102 188
Unemployment rate (Percentage)	11.89
Labour force participation rate (Percentage)	67.09
Absorption rate (Percentage)	59.11

Source: Quantec, 2020

The agriculture, forestry and fishing sector was the largest contributor to employment in the West Coast in 2019 as shown in the figure below. The sector accounted for 37.9% of total employment. Furthermore, the wholesale and retail trade, catering and accommodation sector employed the second largest number of people (representing 17.6% of the employed) during the same period whereas the mining and quarry industry made the lowest contribution to employment (0,2%). Also, about 37.5% of the employed were in the low-skilled category and only 11.8% were classified as skilled workers. The contribution of the informal sector to total employment was about 23.3%.



Source: Quantec, 2020

3. Economic Overview

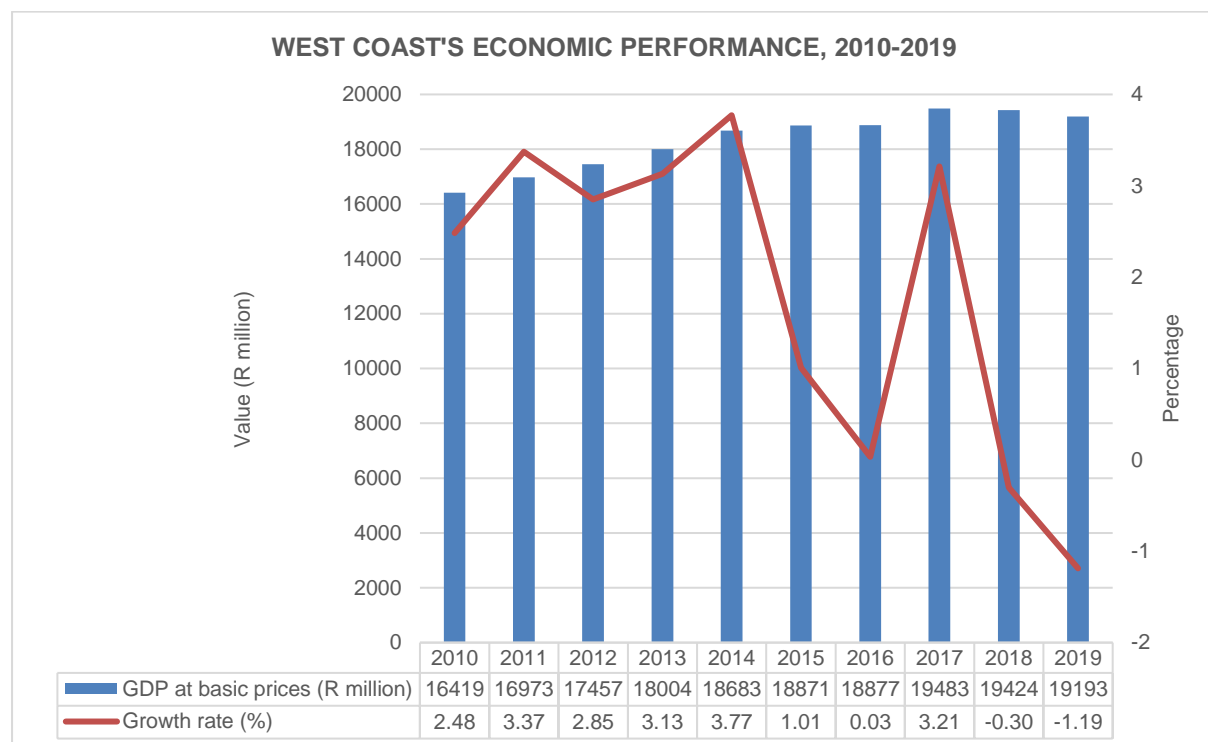
Economic growth at the municipal level is essential for the attainment of economic development, the reduction of poverty and an improved standard of life. Fostering this growth requires an in-depth understanding of the economic landscape within which each respective municipality operates.

The Saldanha Bay municipal area is the largest economy within the West Coast district. The Saldanha Bay Industrial Development Zone (SBIDZ) was officially launched on South Africa's south-western coast on 31 October 2013. Wesgro acted as an administrative partner in the delivery of the Saldanha Bay Industrial Development Zone (SBIDZ) designation. The Saldanha Bay Industrial Development Zone Licencing Company SOC Ltd (SBIDZ-LC) was formally awarded an Operator's Licence for the SBIDZ.

The SBIDZ is the first Special Economic Zone (SEZ) to be located within a port and is the only sector-specific SEZ in South Africa catering specifically to the oil and gas, maritime fabrication and repair industries and related support services.

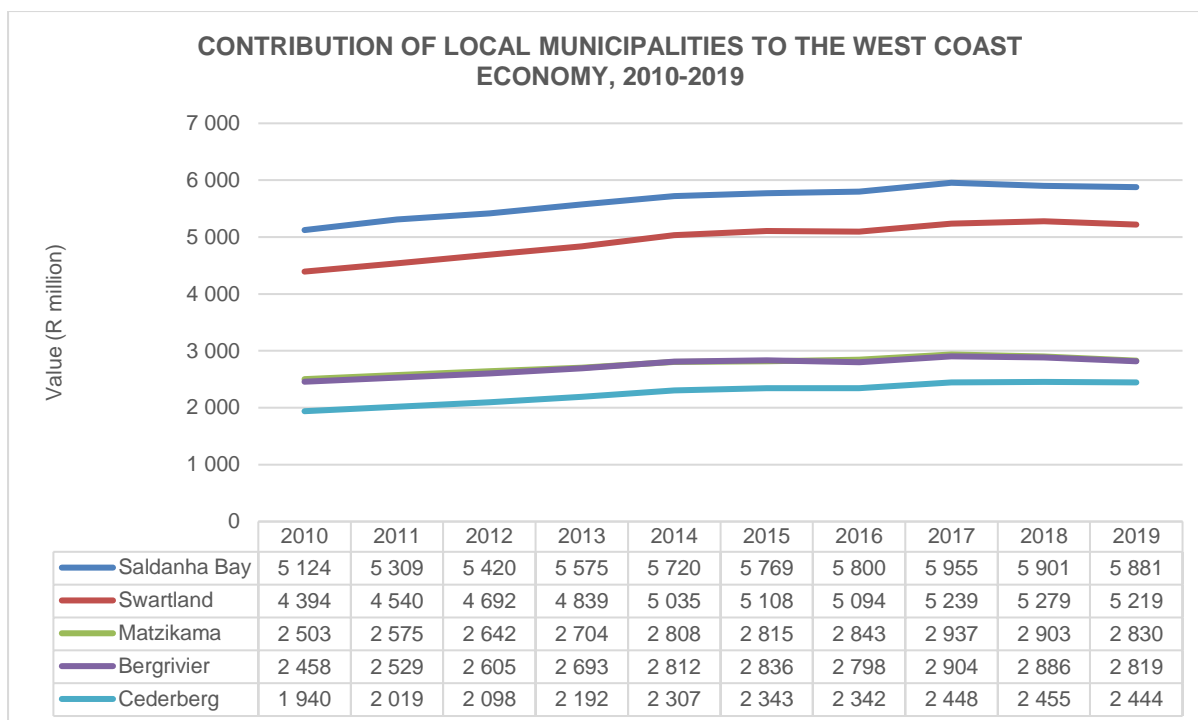
The SBIDZ's location at the southernmost tip of Africa, is the largest and deepest (23m draught) natural port in the southern hemisphere rendering it the perfect place to accommodate and service a wide range of vessels. The SBIDZ's location makes it ideal to service East and West African sea traffic, providing a linkage point for both the African and international market. The SBIDZ will operate as a Freeport with streamlined investor procedures supported by the Ease of Doing Business model.

The figure below shows the West Coast's real GDP at basic prices (real GVA) as well as the growth rate of GDP from 2010 to 2019. In 2019, the real GVA for the West Coast economy was estimated at R19.19 billion. The district's GDP growth declined from 3.2% in 2017 to -1.2% in 2019.



Source: Quantec, 2020

Saldanha Bay is the West Coast's largest municipality in terms of its contribution to economic activity in the district. In 2019, the GVA of Saldanha Bay was R5.88 billion, representing about 30.6% of the real GVA of the West Coast economy. The Swartland and Matzikama municipalities were the second and third largest contributors to the West Coast's GVA, with values of R5.22 billion and R2.83 billion respectively in 2019.



Source: Quantec, 2020

The three largest industries in the West Coast in 2019, in terms of their contribution to GVA, were manufacturing (20.20%); agriculture fishing and forestry (19.25%); and wholesale and retail trade, catering and accommodation (15.42%).

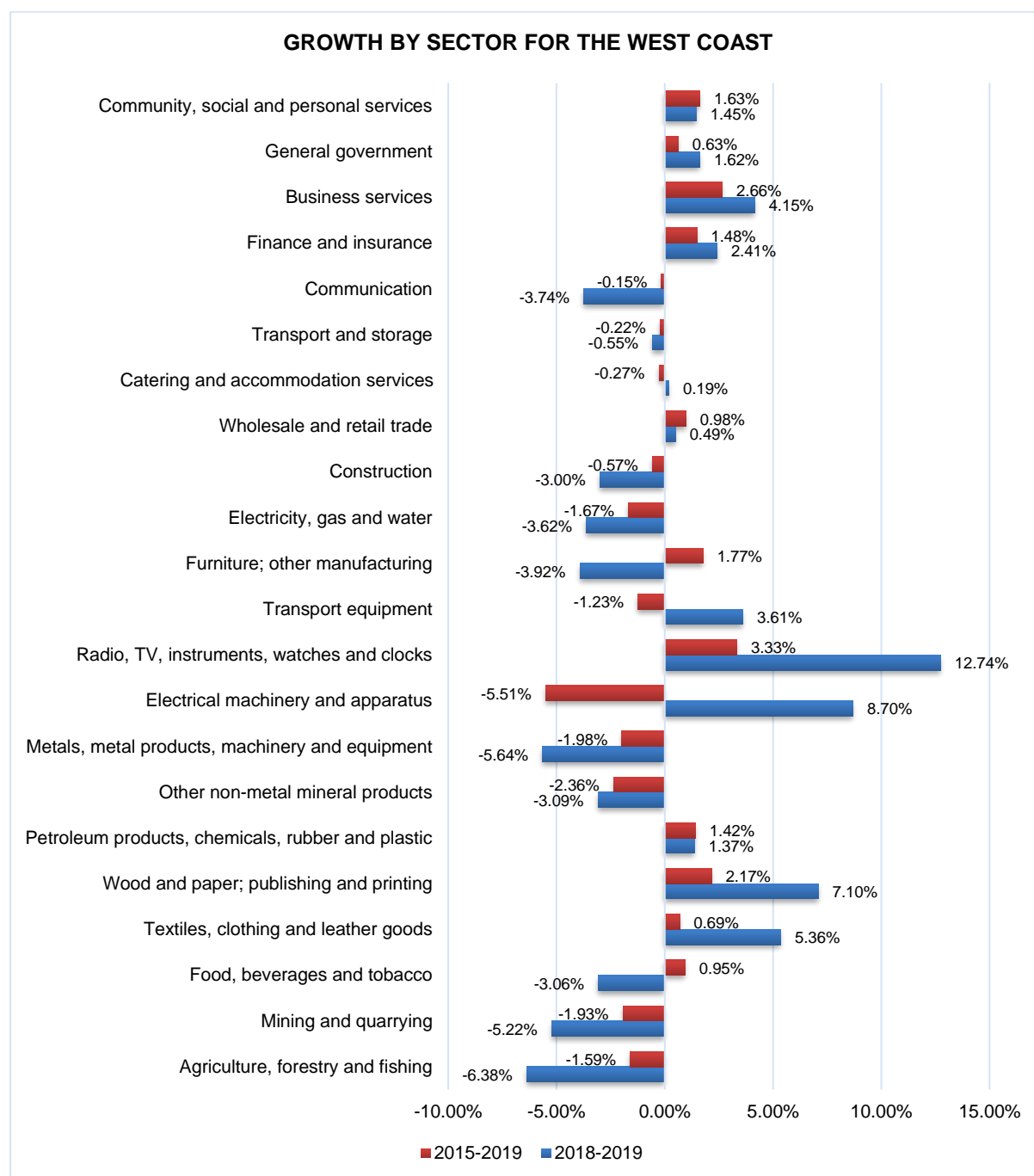
The West Coast's key economic sectors are:

- **Manufacturing** – the district has a strong manufacturing sector. Production activities in the district include agri-processing, cement making, fish processing (along the coast) and mineral processing.
- **Agriculture and fishing** – the district produces various agricultural products including grapes, wines, wheat in Moorreesburg, rooibos tea in Clanwilliam, fruit and forestry in the Cedarberg and citrus farming in Citrusdal. A number of fishing activities such as rock-lobster fishing, line fishing and deep-sea fishing, among other activities take place on the West Coast.
- **Mining** – the district has a sizeable mining sector. Titanium, zirconium, phosphate, limestone, sandstone, salt and diamonds are among the commodities found in the district.
- Other key sectors are the services and construction.

Industry	WEST COAST'S GVA BY INDUSTRY					
	2015 (R million)	2016 (R million)	2017 (R million)	2018 (R million)	2019 (R million)	% Share of GVA 2019
Manufacturing	3 775	3 786	3 821	3 964	3 877	20,20
Agriculture, forestry and fishing	4 003	3 819	4 277	3 946	3 694	19,25
Wholesale and retail trade, catering and accommodation	2 829	2 905	2 907	2 945	2 959	15,42
Finance, insurance, real estate and business services	2 602	2 668	2 743	2 815	2 918	15,21
General government	1 894	1 903	1 904	1 923	1 954	10,18
Transport, storage and communication	1 368	1 361	1 366	1 370	1 354	7,05
Community, social and personal services	1 169	1 200	1 228	1 249	1 267	6,60
Construction	758	775	778	759	737	3,84
Electricity, gas and water	263	252	251	250	241	1,26
Mining and quarrying	211	208	209	201	191	0,99
Total	18 871	18 877	19 483	19 424	19 193	

Source: Quantec, 2020

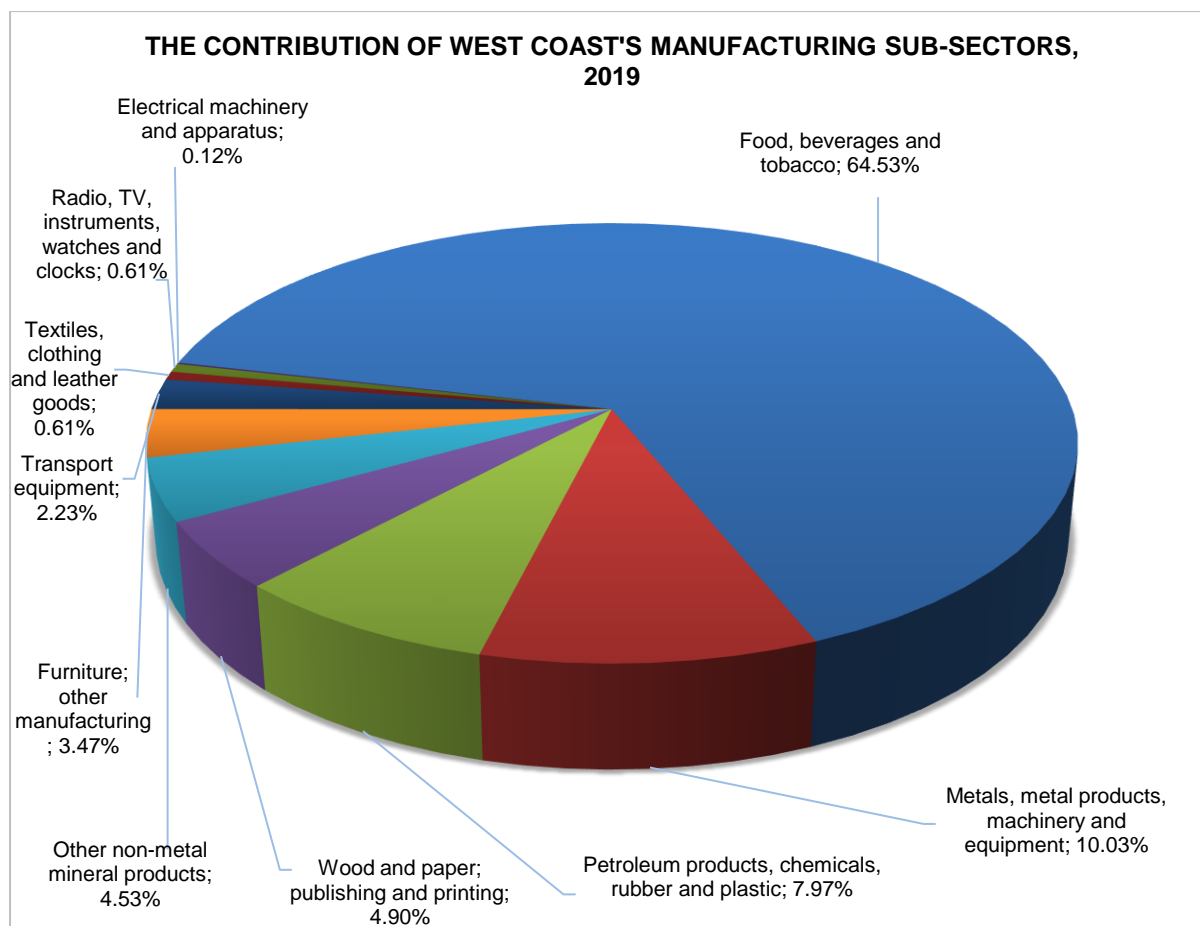
The radio, TV, instruments, watches and clocks sub-sector experienced the fastest growth over the period 2014 – 2018, with an average annual growth rate of 3.33%. This was followed by business services, with an average annual growth of 2.66%. The radio, TV, instruments, watches and clocks sub-sector also experienced the highest growth of 12.74% from 2018 to 2019 whereas the agriculture, forestry and fishing industry declined by 6.38% over the same period.



Source: Quantec, 2020

(Note: 2015-2019, calculated using compound annual growth rate)

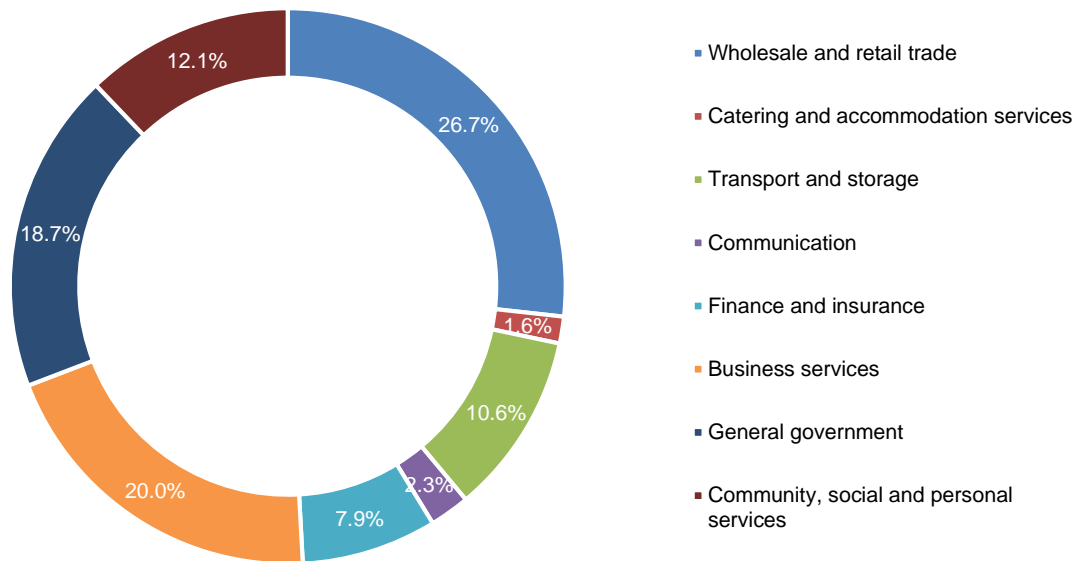
The graph below shows the share of the West Coast's manufacturing sub-sectors in 2019. Food, beverages and tobacco is the largest manufacturing sub-sector. This sub-sector accounted for 64.53% of the manufacturing industry's GVA in 2019. The second largest manufacturing sub-sector was the metals, metal products, machinery and equipment sub-sector, with a share of 10.03% of manufacturing GVA in 2019. Petroleum products, chemicals, rubber and plastics, the third largest manufacturing sub-sector in 2019, contributed 7.97% to the industry's GVA.



Source: Quantec, 2020

The share of West Coast's services sub-sectors in 2019 is presented in the figure below. Wholesale and retail trade was the largest contributor to district's services sector, accounting for 26.7%. Business services (20%) and general government (18.7%) had the second and third largest share respectively.

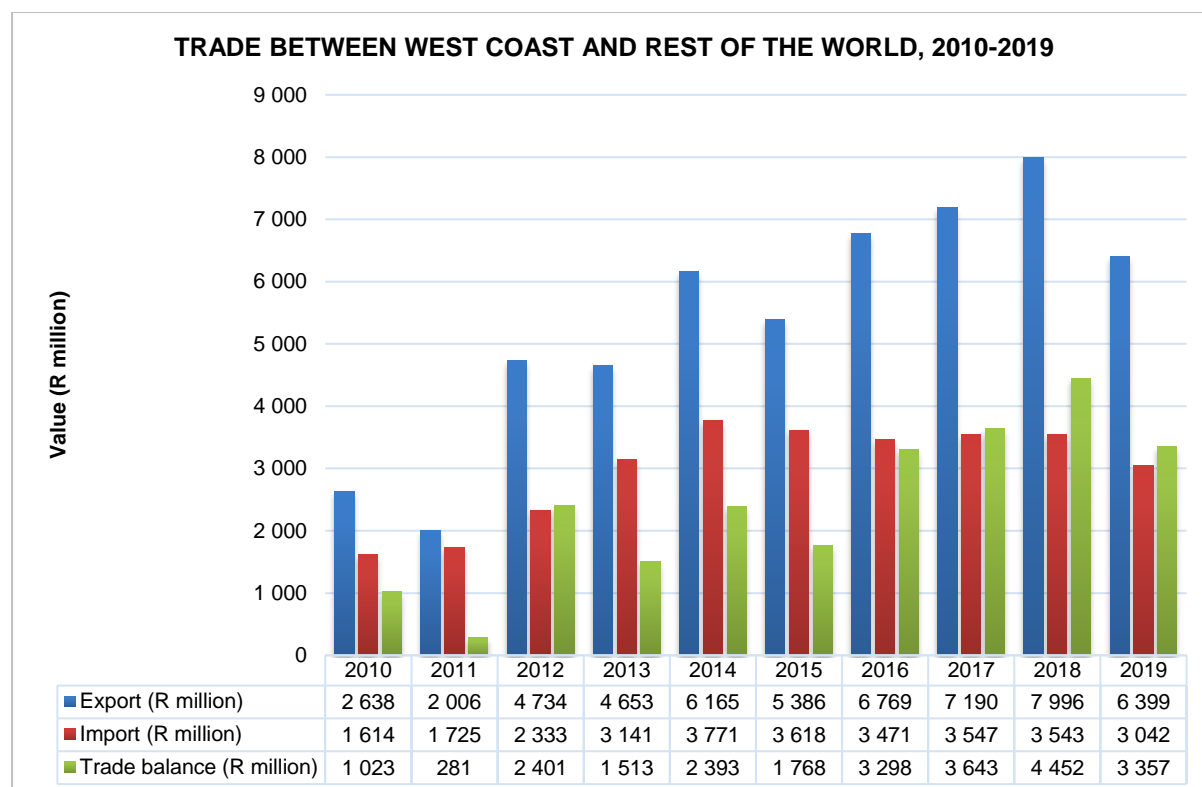
THE CONTRIBUTION OF SERVICES SUB-SECTORS OF THE WEST COAST
ECONOMY, 2019



Source: Quantec, 2020

4. Trade

Between 2010 and 2019, the West Coast consistently maintained a positive trade balance. For instance, in 2019, the district had a positive trade balance of R3.36 million. The value of total exports for the West Coast was about R6.4 billion in 2019, which represented a 19.97% decline compared to the previous year's value. Similarly, total imports decreased from R3.54 million in 2018 to R3.04 million in 2019.



Source: Quantec, 2020

The table below shows the top ten destination markets for products exported from the West Coast between 2015 and 2019. Four of the top ten destination countries are from the African continent. Over the past 5 years, Kenya has been the top destination market for exported products from the West Coast, with a share of 30.27% of total exports over the period under review. The United States (25.42%) and Tanzania (7.49%) ranked second and third respectively.

TOP 10 EXPORT MARKETS FOR THE WEST COAST, 2015-2019			
RANK	DESTINATION COUNTRY	VALUE (R MILLION) 2015-2019	% SHARE 2015-2019
1	Kenya	10 212	30,27%
2	United States	8 576	25,42%
3	United Republic of Tanzania	2 526	7,49%
4	United Kingdom	1 823	5,40%
5	Netherlands	1 777	5,27%
6	Nigeria	1 208	3,58%
7	Germany	1 027	3,04%
8	Namibia	860	2,55%
9	Japan	535	1,59%
10	Canada	471	1,40%
	Others	4 725	14,00%
	Total	33 741	100%

Source: Quantec, 2020

The leading source market for products imported into the West Coast during the 2015-2019 period was China, with a share of 18.05% of total imports. The second and third countries that imported the most products into the West Coast between 2015 and 2019 are Brazil (16.05%) and Thailand (14.02%). Namibia, ranked 7th, was the only African country in the top ten source markets for imported products into the West Coast.

TOP 10 IMPORT MARKETS FOR THE WEST COAST, 2015-2019			
RANK	SOURCE COUNTRY	VALUE (R MILLION) 2015-2019	% SHARE 2015-2019
1	China	3 109	18,05%
2	Brazil	2 764	16,05%
3	Thailand	2 415	14,02%
4	Poland	1 671	9,70%
5	India	898	5,22%
6	Peru	809	4,70%
7	Namibia	746	4,33%
8	Venezuela	533	3,10%
9	Canada	464	2,69%
10	Vietnam	463	2,69%
	Others	3 349	19,45%
	Total	17 222	100%

Source: Quantec, 2020

The top ten exported products from the West Coast accounted for 93.21% of the district's total exports during the 2015-2019 period. As shown in the table below, flat-rolled products of iron or non-alloyed steel which is not clad, plated or coated (with a share of 44.79%) were the leading product exported from the West Coast during the period under consideration. Moreover, flat-rolled iron or non-alloyed steel, which is clad, plated or coated, constituted the second largest exported products (17.16%), followed by citrus fruit (12.89%).

For the 2015-2019 period, the West Coast's top ten imported products accounted for 79.91% of the district's total imports. The top three products that were imported into the West Coast during the 2015-2019 period were iron ores and concentrates (19.21%); rice (17.51%); and flat-rolled products of other alloy steel (11.78%).

TOP 10 EXPORTED PRODUCTS FOR WEST COAST				TOP 10 IMPORTED PRODUCTS FOR WEST COAST			
RANK	PRODUCT	VALUE (RM) 2015-2019	% SHARE 2015- 2019	RANK	PRODUCT	VALUE (RM) 2015-2019	% SHARE 2015- 2019
1	Flat-rolled products of iron or non-alloy steel, of a width of 600 mm or more, hot-rolled, not clad, plated or coated	15 114	44,79%	1	Iron ores and concentrates, including roasted iron pyrites	3 308	19,21%
2	Flat-rolled products of iron or non-alloy steel, of a width of 600 mm or more, clad, plated or coated	5 789	17,16%	2	Rice	3 016	17,51%
3	Citrus fruit, fresh or dried	4 348	12,89%	3	Flat-rolled products of other alloy steel, of a width of 600 mm or more	2 029	11,78%
4	Wine of fresh grapes, including fortified wines; grape must other than that of heading 20.09	2 275	6,74%	4	Unwrought zinc	1 740	10,10%
5	Locust beans, seaweeds and other algae, sugar beet and sugar cane, fresh, chilled, frozen or dried, whether or not ground; fruit stones and kernels and other vegetable products (including unroasted chicory roots of the variety <i>Cichorium intybus sativum</i>)	2 172	6,44%	5	Coke and semi-coke of coal, of lignite or of peat, whether or not agglomerated; retort carbon	1 554	9,02%
6	Flat-rolled products of iron or non-alloy steel, of a width of 600 mm or more, cold-rolled (cold-reduced), not clad, plated or coated	837	2,48%	6	Carbon electrodes, carbon brushes, lamp carbons, battery carbons and other articles of graphite or other carbon, with or without metal, of a kind used for electrical purposes	675	3,92%
7	Semi-finished products of iron or non-alloy steel	332	0,98%	7	Cane or beet sugar and chemically pure sucrose, in solid form	453	2,63%
8	Fish, frozen, excluding fish fillets and other fish meat of heading 03.04	230	0,68%	8	Dried leguminous vegetables, shelled, whether or not skinned or split	351	2,04%
9	Cereal groats, meal and pellets	177	0,53%	9	Metal-rolling mills and rolls therefor	333	1,93%
10	Molluscs, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine; smoked molluscs, whether in shell or not, whether or not cooked before or during the smoking process; flours, meals and pellets of molluscs, fit for human consumption	176	0,52%	10	Fish, frozen, excluding fish fillets and other fish meat of heading 03.04	304	1,76%
	Others	2 291	6,79%		Others	3 459	20,09%
	Total	33 741	100		Total	17 222	100

Source: Quantec, 2020

5. Investment

Between January 2003 and December 2019, two FDI projects were recorded in the West Coast. The two projects had a combined value of R592.67 million and created a total of 1 504 jobs for the district. The source markets were Germany and Luxembourg.

FDI INTO THE WEST COAST							
DATE	INVESTING COMPANY	SOURCE COUNTRY	DESTINATION CITY	SECTOR	SUB-SECTOR	CAPEX (R MILLION)	JOBS
2005	MAN Ferrostaal	Germany	Saldanha	Industrial equipment	Agriculture, construction, & mining machinery	575,41	1500
2008	ArcelorMittal South Africa	Luxembourg	Saldanha	Metals	Steel products	17,26	4
Total						592,67	1504

Source: FDI Intelligence, 2020

6. Companies

Some of the main companies in the West Coast are shown in the table below:

MAJOR BUSINESSES IN THE WEST COAST			
COMPANY	LOCATION	SECTOR	ACTIVITY / INDUSTRY
Sea Harvest	Saldanha Bay	Agriculture	Fish-processing
Saldanha Steel Pty Ltd	Saldanha Bay	Iron & Steel	Steel
Duferco Steel Processing (Pty) Ltd	Saldanha Bay	Iron & Steel	Steel
Pioneer Fishing (West Coast) Pty Ltd	St Helena Bay	Food & Beverages	Ocean & Coastal Fishing
Oceana	Lamberts Bay	Agriculture	Fish-processing
Everseason (Pty) Ltd	Citrusdal	Food & Beverages	Wholesale Trade in Foodstuffs
Rooibos Ltd	Clanwilliam	Food & Beverages	Manufacture of Coffee, Coffee Substitutes and Tea
Saldanha Bay IDZ Licencing Company SOC Ltd	Saldanha Bay	Oil & Gas, Maritime Fabrication & Repair Industries & Related Support Services	Special Economic Zone (SEZ)
Tallie Marine (Pty) Ltd	St Helena Bay	Manufacturing	Building and Repairing of Ships and Boats
Carmien Tea (Pty) Ltd	Citrusdal	Food & Beverage	Manufacture of Coffee, Coffee Substitutes and Tea
Goede Hoop Sitrus (Pty) Ltd	Citrusdal	Agriculture	Agricultural and Animal Husbandry Services, Except Veterinary Activities
Mouton Citrus (Pty) Ltd	Citrusdal	Agriculture	Growing of Fruit, Nuts, Beverage and Spice Crops
Saldanha Pilchards (Fishing & Canning Pty Ltd)	St Helena Bay	Agriculture	Fish-processing
Lusitania	Laaiplek	Agriculture	Fish-processing
Spoornet	Saldanha Bay	Transport	-
National Ports Authority	Saldanha Bay	Transport	-
Namakwa Sands	Vredenburg	Mining	Mineral
Club Mykonos Resort	Langebaan	Tourism	Accommodation
Clanwilliam Dam Resort	Clanwilliam	Tourism	Accommodation
Shelly Point Hotel	St Helena Bay	Tourism	Accommodation
West Coast National Park	Saldanha Bay	Tourism	Accommodation

Source: Who Owns Whom, 2019, Wesgro's Top 100 Exporters, West Coast District Municipality, 2018

7. Incentives

Selected initiatives in the West Coast are shown in the table below.

SELECTED ON-GOING AND APPROVED INITIATIVES IN THE WEST COAST		
INITIATIVE	OVERVIEW	PROJECT PHASE
Upgrades of the Saldanha Bay port	The Saldanha port has been a centre of activity in the past couple of years which has seen the extensive development and upgrading of facilities (for example the upgrade of the bulk iron-ore handling facility). The port is directed to support the growing gas and oil industry on the west coast of Africa.	Ongoing
Saldanha Industrial Development Zone (SEZ)	The Saldanha Industrial Development Zone (SBIDZ) is the first Special Economic Zone (SEZ) to be located within a port and is the only sector-specific SEZ in South Africa catering specifically to the oil and gas, maritime fabrication and repair industries and related support services.	Approved
Support in the aquaculture sector	There is increasing activity in aquaculture in municipalities along the coastal regions. The Matzikama municipality is assisting with the development and promotion in cob farming, and abalone cultivation and ranching in Doring Bay.	Ongoing.

Source: Invest in Western Cape, 2018

Selected Investment Opportunities in West Coast district are shown in the figure below:

WIND ENERGY <ul style="list-style-type: none"> • With Wind Speed of 6m/s - have attracted the development of Wind Farms in the Area • Manufacturing of Wind Generation Plants is a possibility • Manufacturing of wind components 	WAVE ENERGY <ul style="list-style-type: none"> • Rough Seas and high waves can be used to generate large amounts of renewable wave energy • Resources along West Coast are well suited and supported by adjacent infrastructure development . 	SOLAR ENERGY <ul style="list-style-type: none"> • Improved technologies are making remote areas that are sun-drenched suitable for solar energy generation • Opportunities exist to supply plants in the area with Solar energy
AQUACULTURE PROJECTS <ul style="list-style-type: none"> • Fish farming opportunities exist in the area • Opportunities exist in Abalone, Finfish, Atlantic Salmon and Seaweed Farming 	OIL & GAS <ul style="list-style-type: none"> • Saldanha Bay IDZ is a focal point for the attraction of industries within the Oil & Gas sector • Drilling, exploration, production and support services are all potential sub-sectors offering investment. 	MANUFACTURING <ul style="list-style-type: none"> • Small scale processing of dairy products • Commercial production of petroleum refineries & products • Commercial production of fabricated metals, special industry machinery • Commercial and small scale production of downstream iron and steel, jewellery.

Source: West Coast Municipality, 2018

8. Tourism

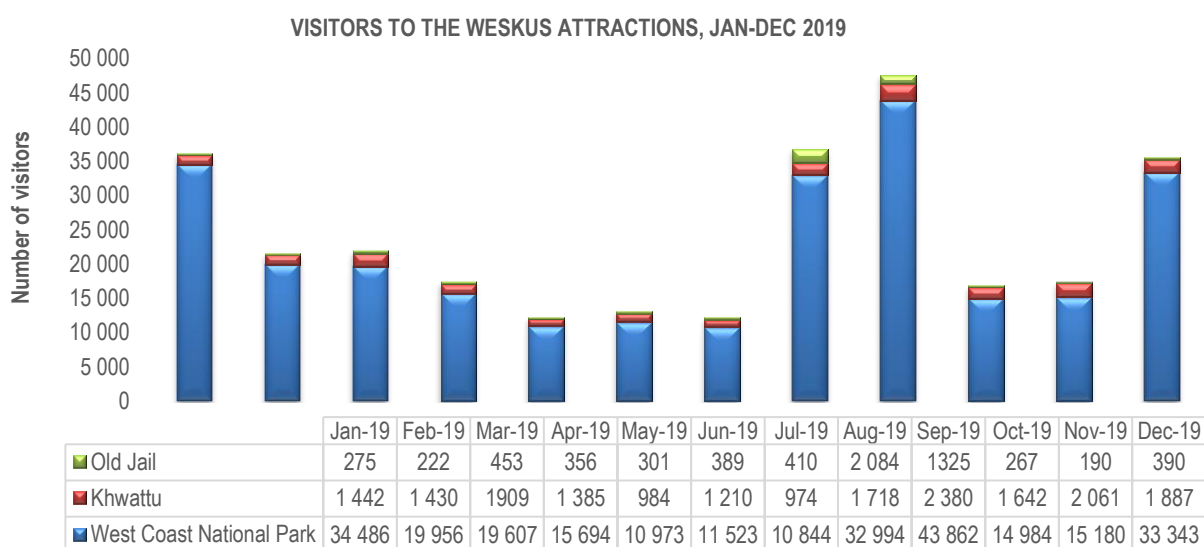
Participating tourism offices in the West Coast district received a total of 6,191 responses to the regional visitor tracking survey in 2019. The tourism offices included Clanwilliam, Darling, Goedverwacht, Lamberts Bay, Langebaan, Malmesbury, Moorreesburg, Paternoster, Piketberg, Porterville, Riebeeck Valley, Vanrhynsdorp, Velddrif, Vredenburg, Vredendal and Yzerfontein.

The West Coast region stretches from the border of Cape Town Metropole to the border of the Northern Cape. Due to the close proximity to Cape Town, self-drives emerged as an extremely popular activity undertaken in the region. The West Coast is also home to the prominent West Coast National Park, a popular icon enjoyed by both nature and flower enthusiasts. The park bursts into colour during the annual flower season (1st August to 30th September), and during September 2019 the park recorded a significant 18.9% year-on-year increase in visitors.

The *Cradle of Human Culture* route, launched in April 2019, is a partnership with the Cradle of Humankind, a UNESCO World Heritage Site located in the Gauteng province, and captures the archaeological and paleontological heritage routes with three anchor sites in the Western Cape. The “Artist’s Journey” along the *Cradle of Human Culture* route includes a total of seven archaeological and cultural sites on the West Coast: !Kwa ttu (Yzerfontein), West Coast Fossil Park (Langebaan), Elands Bay Cave (Elands Bay), Diepkloof Rock Shelter (Piketberg), Riel dancers site, Sevilla Rock Art Trail (Clanwilliam) and Truitjieskraal at the Matjiesrivier Reserve. The route offers an opportunity for the destination to appeal to a wider travel audience as well as job creation in the industry.

8.1 Performance of Attractions

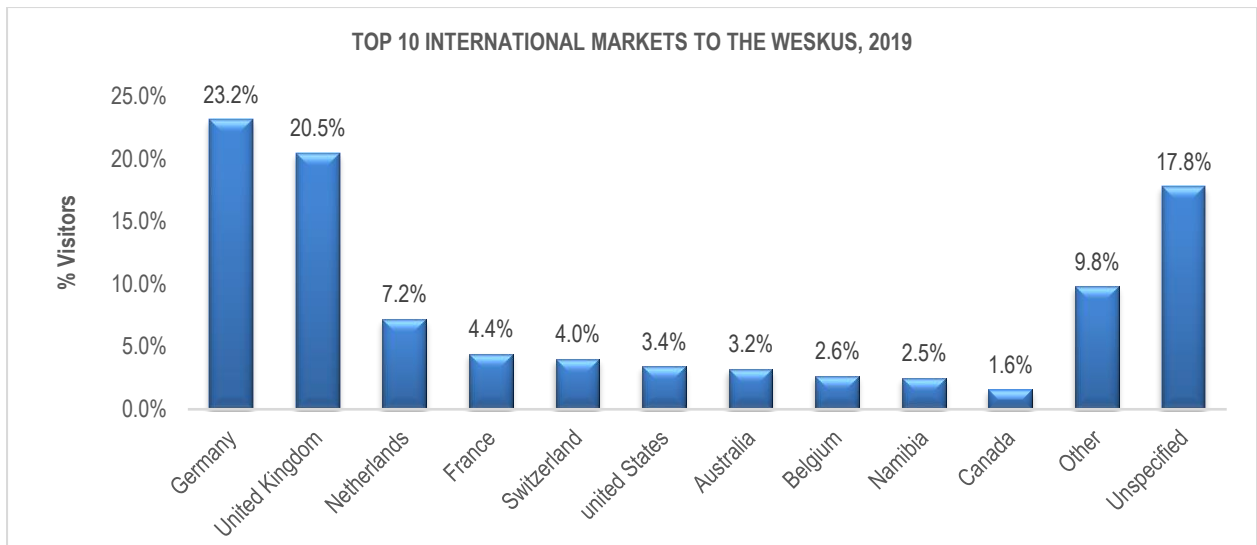
The Weskus attractions illustrated in the figure below recorded an accumulated total of 289 130 visitors in 2019. Overall, visitor arrivals to these attractions decreased by -9.4% when compared to 2018 (319 019). Individually, Khwattu recorded a year-on-year increase of 2.4% in visitors, while the Old Jail and West Coast National Park experienced year-on-year declines. In spite of the annual decline in visitors to the West Coast National Park, nearly 265 000 tourists visited the park in 2019, with August, September and December ranking as the most popular travel months.



Sources: Vanrhynsdorp Tourism Office, Khwattu and SANParks, 2020

8.2 Origin of Visitors

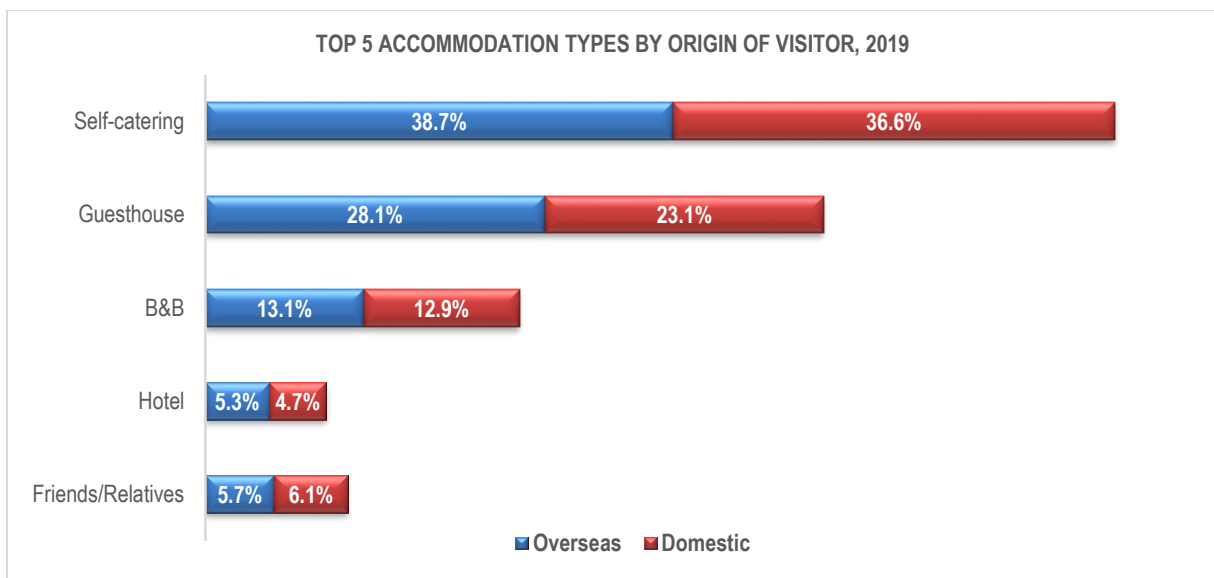
The top five international markets who responded to the regional tracking surveys at the respective the West Coast Visitor Information Centres (VICs) included Germany (23.2%), the United Kingdom (20.5%), Netherlands (7.2%), France (4.4%) and 4.0% from Switzerland. Domestic visitors made up 77.3% (4,783) of visitors surveyed at the West Coast VICs. The top three domestic markets were Western Cape (73.3%), Gauteng (11.7%) and Mpumalanga (3.4%).



Source: Wesgro Weskus Tourism Trends, 2020

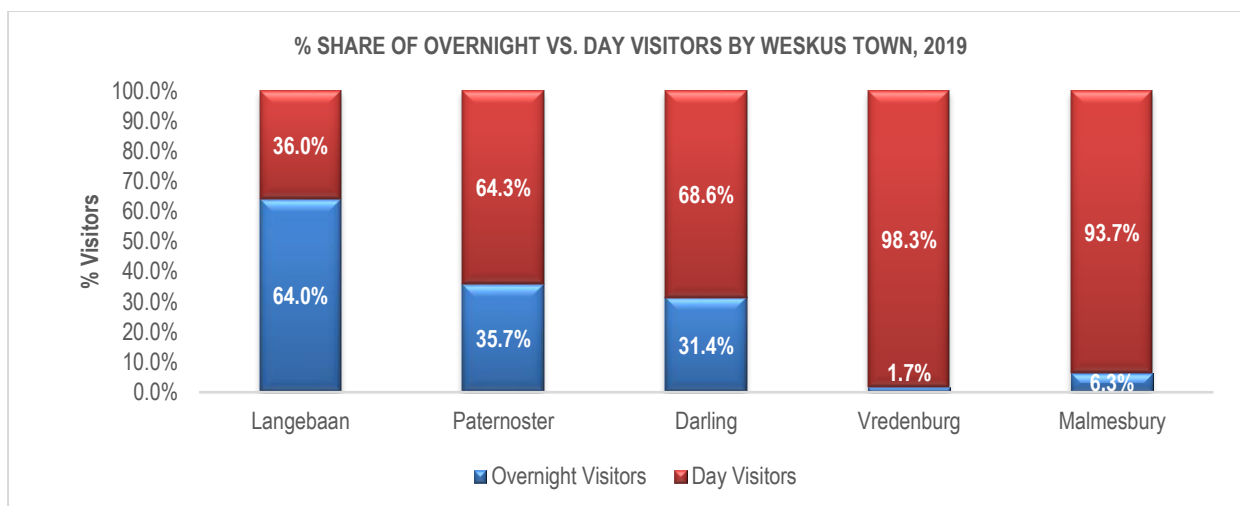
8.3 Overnight Stays

61.7% of visitors to the West Coast VICs stayed overnight and of these, 31.6% stayed for two nights while 23.7% indicated a stay of three nights in the region. Overall, self-catering (37.4%), guesthouse (24.5%) and B&Bs (13.3%) were the most common types of accommodation used by visitors. These accommodation types also ranked as the top three preferences amongst both overseas and domestic visitors as indicated below.



Source: Wesgro Weskus Tourism Trends, 2020

By town, Langebaan recorded the largest (64.0%) share of overnight visitors in 2019, followed by Paternoster (35.7%) and Darling (31.4%). All towns illustrated in the figure below, with the exception of Langebaan, received a larger proportion of day visitors, a trend which is anticipated due to the overall significant share of visitors who have cited scenic/self-drives (24.4%) as their top activity undertaken in the region.



Source: Wesgro Weskus Tourism Trends, 2020

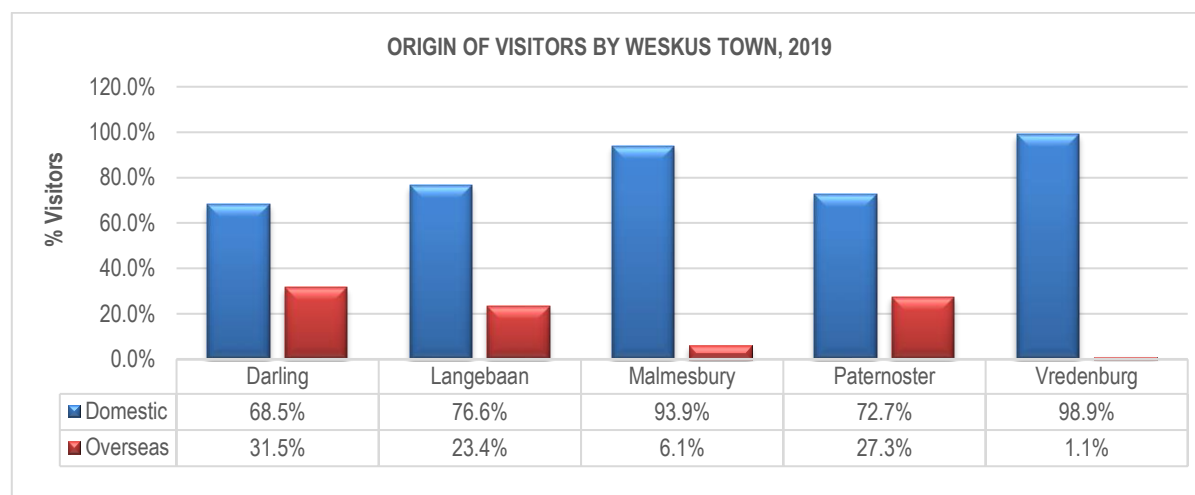
8.4 Visitor Trends by Town

This section provides key trends for towns which recorded a strong sample of responses for the purpose of analysis by Weskus town.

Trends by town underlines the strength of the domestic market to the region, particularly Vredenburg and Malmesbury. Over 90% of visitors to these two towns originated from the domestic market.

Scenic drives, culture/heritage and cuisine were amongst the top activities for nearly all towns. Visitors to Langebaan, however, cited national parks/nature reserves as a top activity. This is largely attributed to the influx of visitors to the West Coast National Park. Since the inception of the *Cradle of Human Culture route*, culture and heritage activities and sites gained even more popularity in the West Coast.

Holiday/leisure was the main purpose of visit to all participating towns, while an additional 12.0% of visitors to Riebeeck Valley cited events/festivals as their main purpose of visit. Although the overall sample of respondents for events/festivals is at a small base (2,2%), it is important to note that the majority of visitors attending events and festivals travel directly to the event locations and are therefore not captured at the tourism offices where the surveys are conducted. During the annual flower season, the respective towns host a number of flower shows and these events are well attended, particularly by the domestic market.



Source: Wesgro Weskus Tourism Trends, 2020

9. Film

Comprising of Swartland, Makzikama, Saldanha, Bergrivier, and Cederberg, the Cape West Coast region is an emerging location for filming. Filmmakers are spoilt for choice, as the region contains wild flowers, quaint seaside towns, wine farms and cellars, culture and heritage attractions, such as the West Coast National Park and the Fossil Park. The Cederberg and Makzikama mountain ranges feature ancient rock paintings while the windiest sections of beaches are ideal for shoots that feature adventure sports, such as kite surfing and paragliding. The vast, unspoilt beaches and charming wine and olive routes provide a unique canvas for filmmakers.

Municipal properties will require a permit available at the local town council. Rates are dependent on the size of the crew and duration of the shoot. For road closures, the traffic department needs to be involved. Filming in nature reserves and on beaches requires an ECO guide and environmental impact study with your application. When filming on private property or in an estate, you will need landowners' permission as well as permission from the governing body.

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Films Shot on Location:

Films: Young Ones

Commercials: Lipton Tea, Timotei Shampoo

Stills: Playboy, Top Billing, Bushmills

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