

Cape Town & Western Cape

Western Cape Tourism Trends Q2 (April- June) 2012



THE WESTERN CAPE DESTINATION MARKETING,
INVESTMENT AND TRADE PROMOTION AGENCY –
SOUTH AFRICA

I. General Overview

Global

According to the September 2012 issue of the UNWTO World Tourism Barometer, international tourist arrivals increased with 5% in the first half of 2012, recording **467 million** tourists. Globally, international tourist arrivals grew by more than 22 million between January and June 2012, from 445 million in the same period of the previous year.

National

The total tourist arrivals from April to June 2012 to South Africa were **2,148,566**, reflecting 10.5% growth when compared to the same period of the previous year. South Africa received the most visitors from Africa & the Middle East (1,634,212) followed by Europe (245,514).

Regional

The foot count is the number of walk-ins across the Western Cape and is comprised of visitors who came to the regional tourism offices to make bookings and to obtain general information about the destination. There were a total of **119,713** walk-ins in Q2 2012. The recording period was April (48,846), May (42,221) and June (28,646). Cape Town received 55,783 walk-ins, followed by the Cape Winelands (21,500), the Cape Garden Route & Klein Karoo (16,693), the Cape Overberg (16,536), the Cape West Coast (7,266) and the Cape Karoo (1,935).

Of the visitors to the Western Cape, 67.2% were domestic, followed by 30.4% who were from overseas, 1.1% originated from Africa (excluding domestic) and 1.3% did not indicate their country of origin. Of the overseas visitors, 6.6% were from the United Kingdom, followed by Germany (5.7%), United States (3.5%), the Netherlands (2.9%), France and Australia (1.7% respectively). Of the domestic visitors, 44.5% were from the Western Cape, followed by Gauteng (9%), Eastern Cape (2.6%), KwaZulu-Natal (2.4%) and the Free State (1.5%).

Cape Town received the majority of overseas visitors (70.8%), followed by the Cape Winelands (46.4%), the Cape Garden Route & Klein Karoo (31.5%), the Cape Overberg (28.6%), the Cape West Coast (7.5%) and the Cape Karoo received 4.4% overseas visitors. The Cape Karoo welcomed the most domestic visitors (93.8%), followed by the Cape West Coast (91.5%), the Cape Overberg (70.6%), the Cape Garden Route & Klein Karoo (66%), the Cape Winelands (50.8%) and Cape Town (21.3%). Cape Town received 4.2% visitors originating from Africa (excluding domestic), followed by the Cape Winelands (1.1%).

In Q2 2012, the average travel group size to the Western Cape was three and the most common was two. Of the visitors to the Western Cape, 47.1% indicated that they stayed overnight, while 52.9% did not indicate their length of stay. The overall average length of stay of visitors was three nights.

The majority (79%) of visitors to the Western Cape travelled for holiday, followed by 5.8% who travelled for business, 2.4% attended events in and around the Western Cape, 2.3% explored the wine routes, 1.5% visited friends and relatives, 1.2% enjoyed the cuisine, 1.1% travelled to weddings and 2.1% travelled for various other reasons.

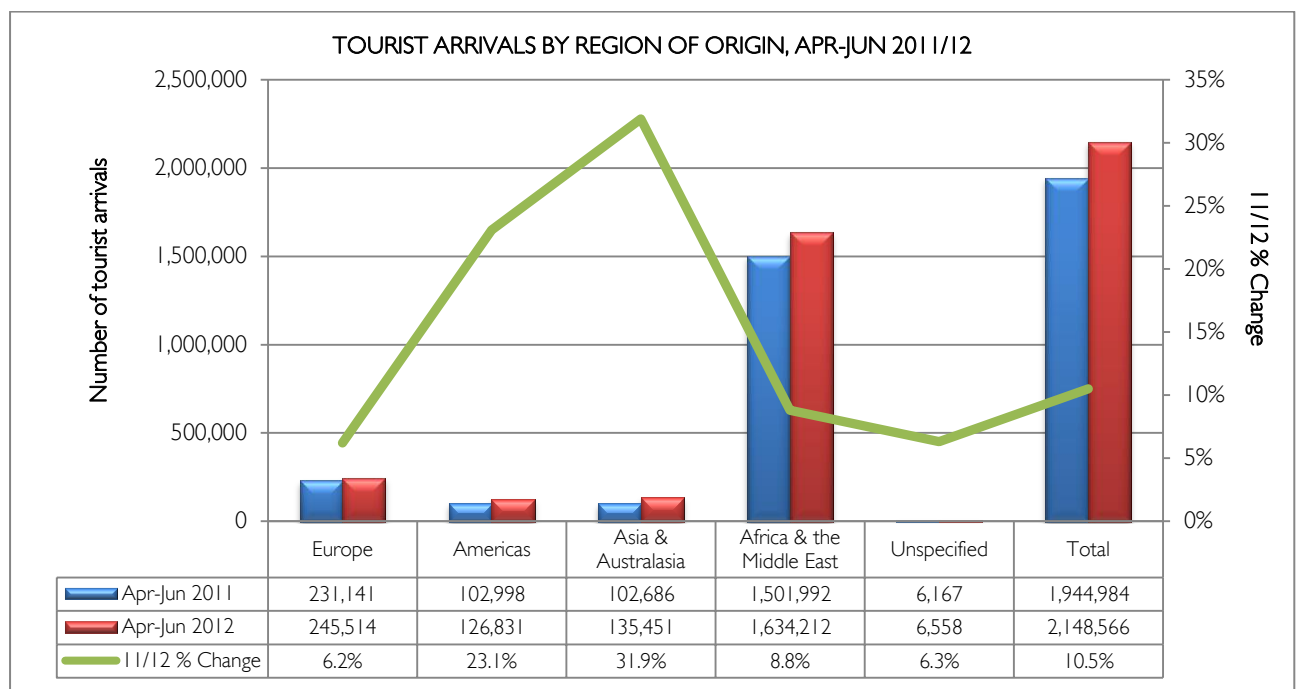
2. Global Trends

Forecasts conducted by UNWTO, indicate that by the end of 2012, it is expected that the total number of international tourists will exceed the one billion mark for the first time, despite the challenging economic environment. Taleb Rifai, UNWTO Secretary-General stated that, "amid the current economic uncertainty, tourism is one of the few economic sectors in the world growing strongly, driving economic progress in developing and developed countries alike and, most importantly, creating much needed jobs".

Between January and June 2012, growth in arrivals was recorded across all the regions of the world, with both advanced and emerging economy markets increasing at a similar pace. Asia and the Pacific achieved the highest growth (8%); this was especially due to the recovery of Japanese inbound and outbound tourism as well as the consistently strong performance of key source markets. Africa followed with an increase of 7%, predominantly driven by the top destination markets; South Africa (11%), Sierra Leone (17%), Cape Verde (15%) and Madagascar (13%), however, the recovery in Egypt (23%) also shifted the Middle East into a healthy growth, and the increase in tourists arrivals into Tunisia (42%) boosted the arrivals recorded for North Africa (11%). The Americas recorded a 5% increase, with the strongest growth across Central America (7%) and South America (6%). Despite the economic instability, Europe saw an increase of 4%, largely due to double digit growth across Central and Eastern Europe destinations; such as Georgia (54%), Kazakhstan (15%), Russia (15%), Poland (13%), Romania (12%) and Lithuania (12%).

3. National Trends

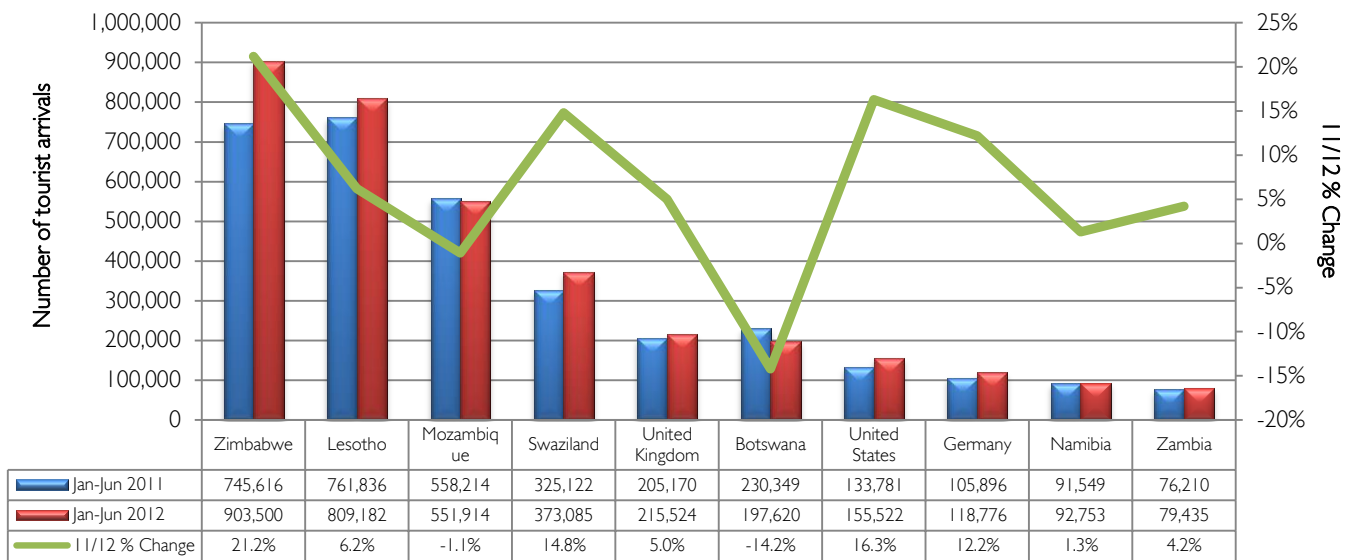
A total of 2,148,566 tourist arrivals travelled to South Africa for the period April-June 2012, achieving a year-on-year growth of 10.5%. Africa & the Middle East (1,634,212) remain consistent in being South Africa's largest source market, followed by Europe (245,514). Growth was achieved across all the regions, with the largest increase from the Asia & Australasia (31.9%), followed by the Americas (23.1%).



Source: SATourism, 2012

In the figure below, the top ten source markets from January-June 2011/12 to South Africa is illustrated. Zimbabwe was the largest source market, followed by Lesotho, Mozambique and Swaziland. Growth was recorded across all source countries, apart from Mozambique (-1.1%) and Botswana (-14.2%). The overseas source markets in the top ten are the United Kingdom (in 5th position), United States (7th) and Germany (8th).

TOP 10 SOURCE MARKETS VISITING SOUTH AFRICA, JAN-JUN 2011/12



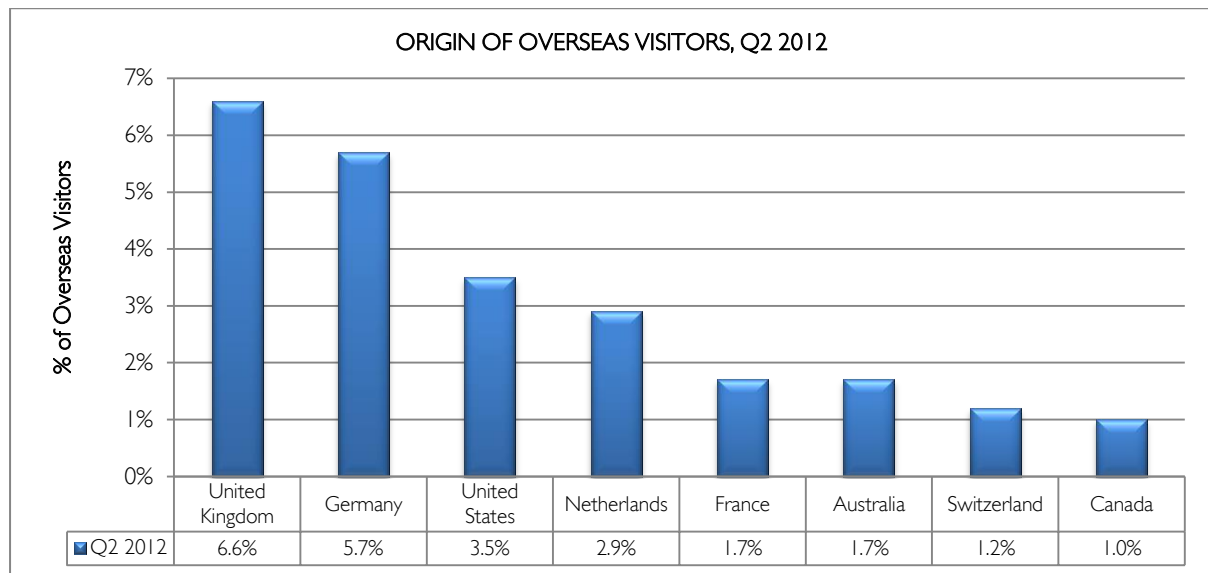
Source: SATourism, 2012

4. Western Cape Trends

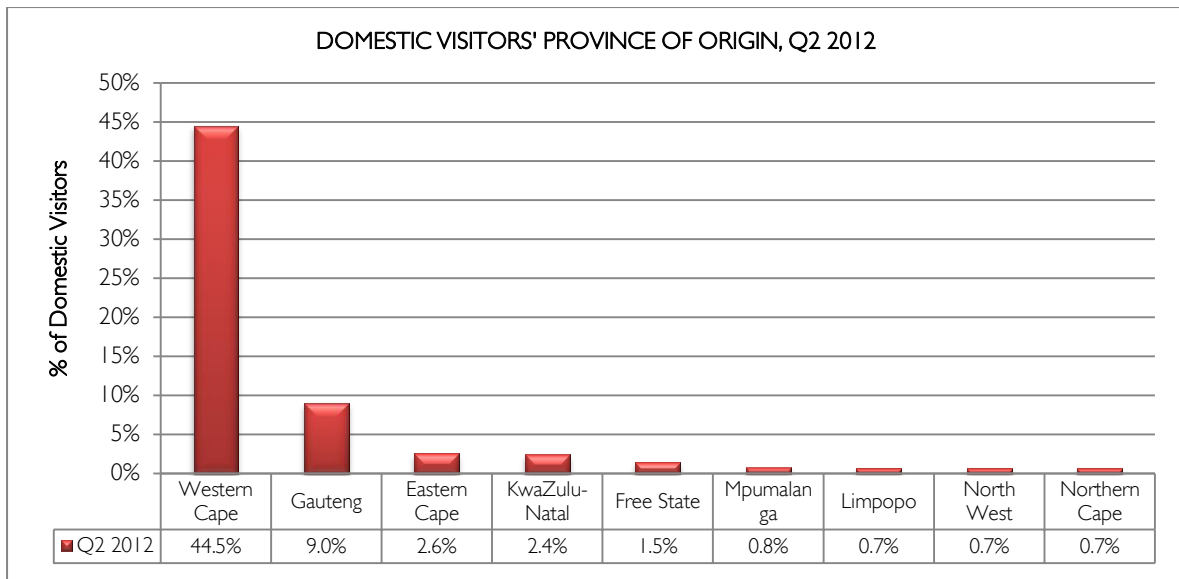
In Q2 2012, a total of **3,889** responses to the regional visitor tracking survey were received from the six regions, across the months of April (44.5%), May (31.9%) and June (23.5%).

Of the visitors to the Western Cape, 67.2% were domestic, followed by 30.4% who were from overseas, 1.1% originated from Africa (excluding domestic) and 1.3% did not indicate their country of origin.

Of the overseas visitors, 6.6% were from the United Kingdom, followed by Germany (5.7%), United States (3.5%), Netherlands (2.9%) and 1.7% (respectively) originated from France and Australia.



Of the domestic visitors, 44.5% were from the Western Cape, followed by Gauteng (9%), Eastern Cape (2.6%), KwaZulu-Natal (2.4%) and the Free State (1.5%).



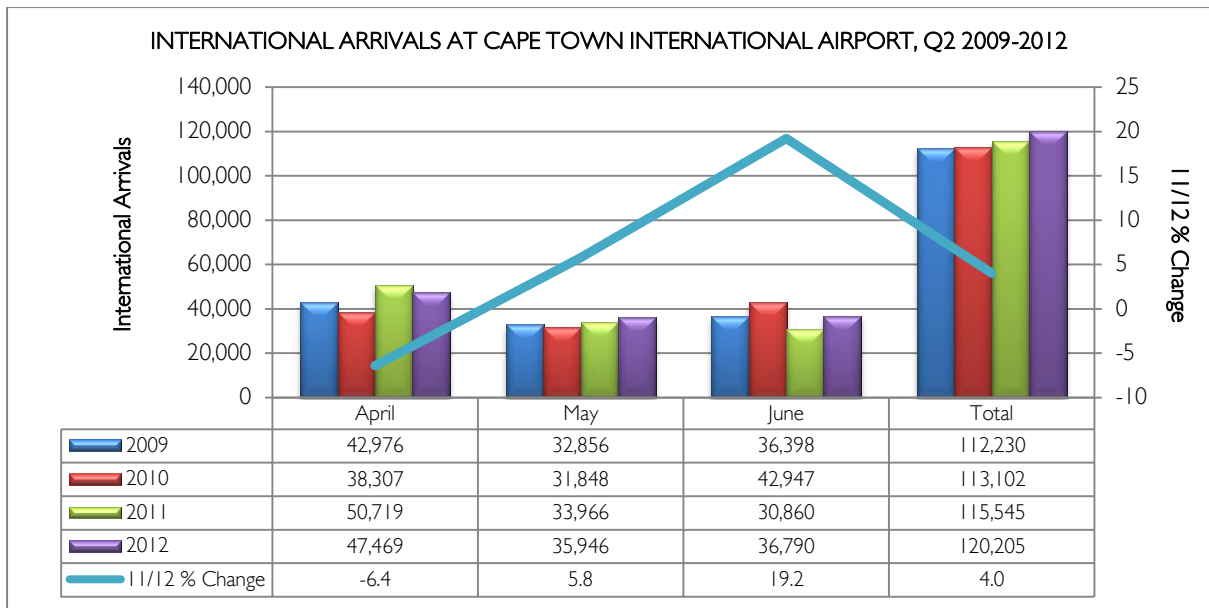
5. Attraction Visitation Trends

ATTRACTION VISITATION BY NUMBER OF VISITORS, Q2 2012					
VISITOR INFORMATION	APRIL	MAY	JUNE	TOTAL	11/12 % CHANGE
Kirstenbosch Botanical Gardens	48,164	36,883	26,407	111,454	-5.8%
V&A Waterfront Shopping Centre	1,869,548	1,428,975	1,362,419	4,660,942	-3.3%
Table Mountain National Park	198,677	130,177	96,056	424,910	6.1%
Table Mountain National Park: Boulders	48,509	29,725	21,956	100,190	19.3%
Table Mountain National Park: Cape of Good Hope	69,524	44,712	33,129	147,365	6.3%
Cango Caves	17,410	9,985	8,149	35,544	-6.5%
Wilderness National Park	5,321	1,439	1,067	7,827	-20.5%
Tsitsikamma National Park	17,023	7,615	4,595	29,233	-4.8%
De Hoop Nature Reserve	1,412	347	419	2,178	-40.1%
De Mond Nature Reserve	612	155	210	977	80.9%
Agulhas Lighthouse	3,125	747	888	4,760	-13.2%
Agulhas National Park	3,386	863	1,046	5,295	-16.5%
Bontebok National Park	1,475	614	450	2,539	-3.3%
Karoo National Park	3,130	1,687	1,835	6,652	-13.6%
West Coast National Park	11,015	8,031	7,278	26,324	-21.6%

6. Provincial Trends

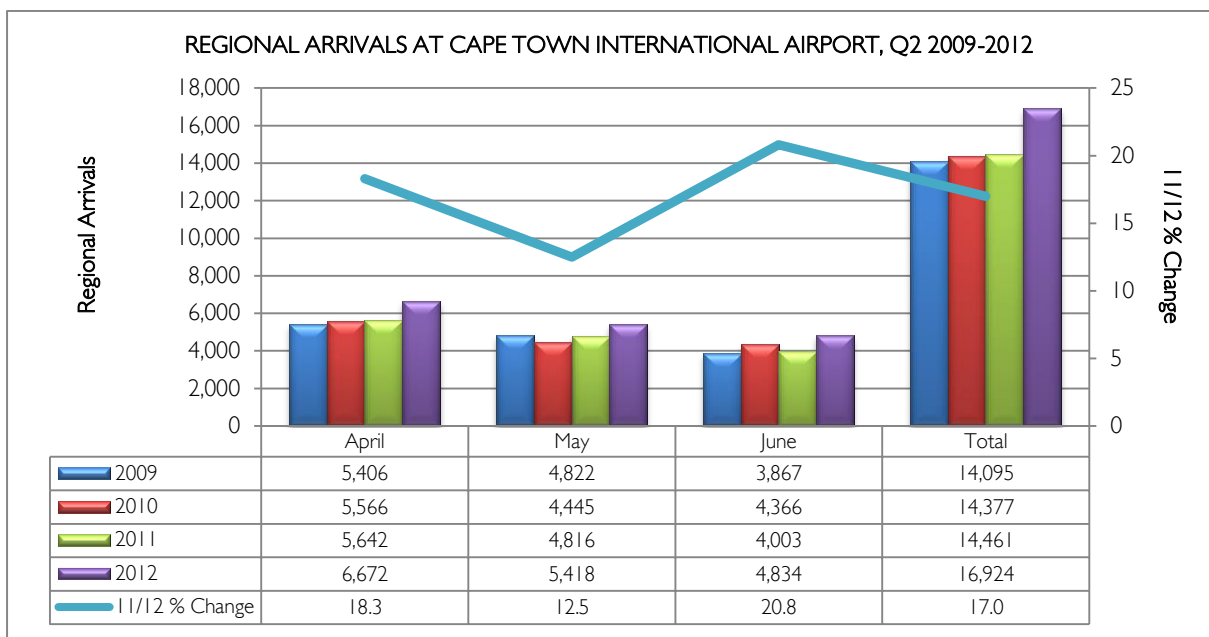
6.1 ACSA Cape Town International Airport Arrivals

In Q2 2012, a total of 120,205 international arrivals came through the Cape Town International Airport. An overall increase of 4% was achieved when compared to the previous year. A decline of 6.4% was experienced in April, following growth in arrivals across May (5.8%) and June (19.2%).



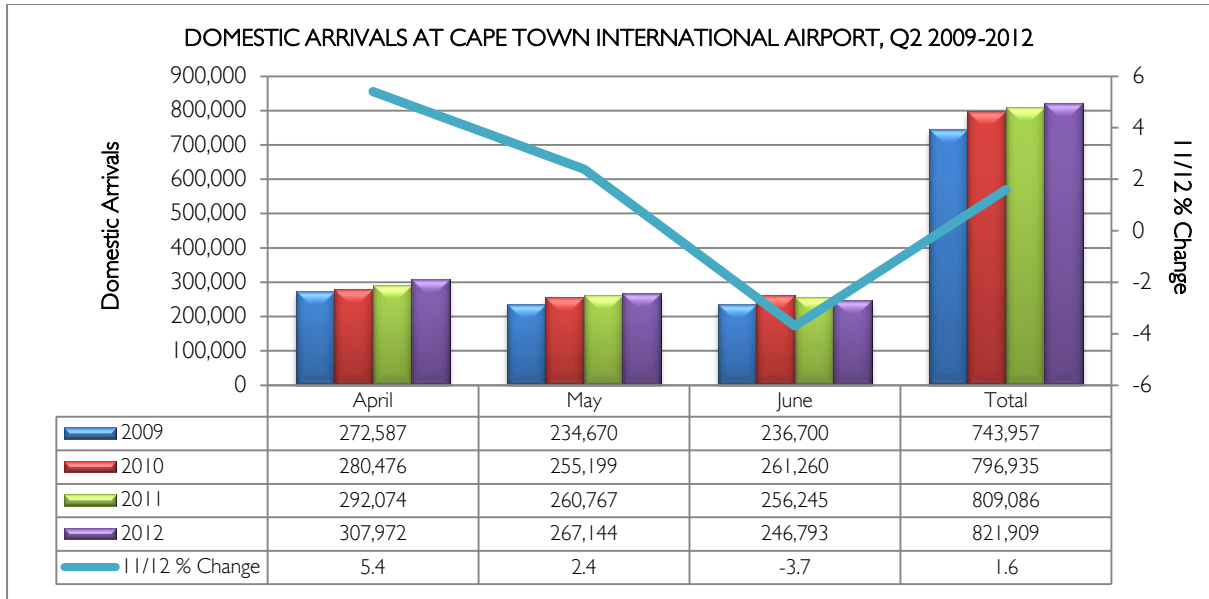
Source: ACSA, 2012

The Cape Town International Airport received a total of 16,924 regional arrivals between April and June 2012, achieving a 17% year-on-year increase. The highest increase in regional arrivals was experienced in June (20.8%), followed by April (18.3%) and May (12.5%).



Source: ACSA, 2012

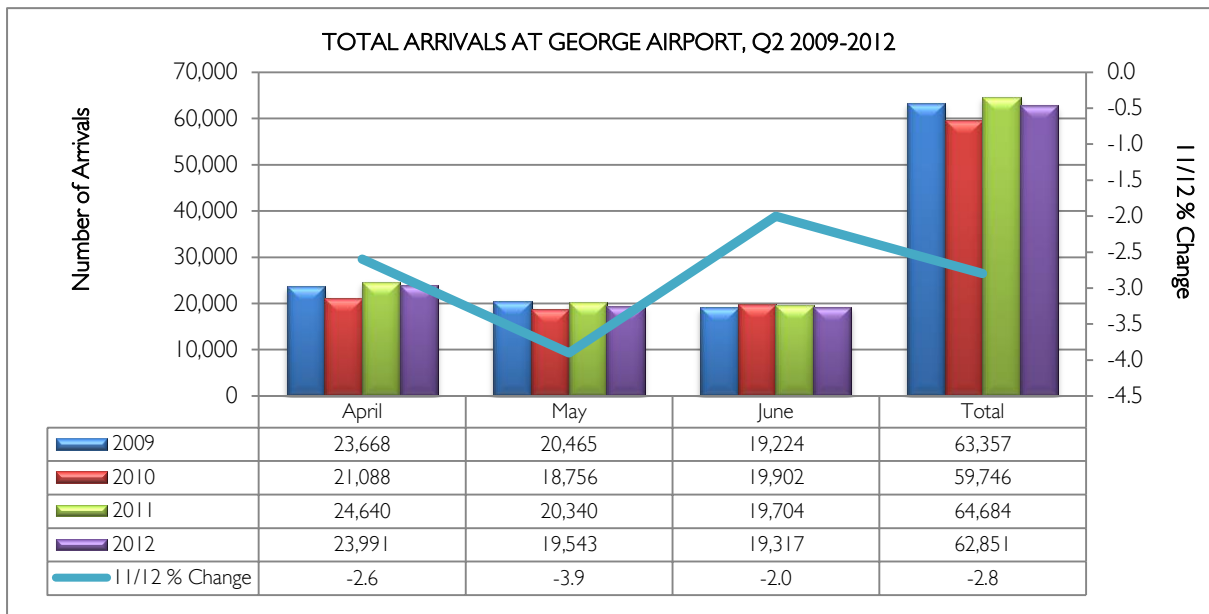
In Q2 2012, a total of 821,909 domestic arrivals entered the Cape Town International Airport, achieving an overall increase of 1.6% when compared to the same period of the previous year. Growth was recorded across April (5.4%) and May (2.4%), following a decrease of 3.7% in June.



Source: ACSA, 2012

6.2 ACSA George Airport Arrivals

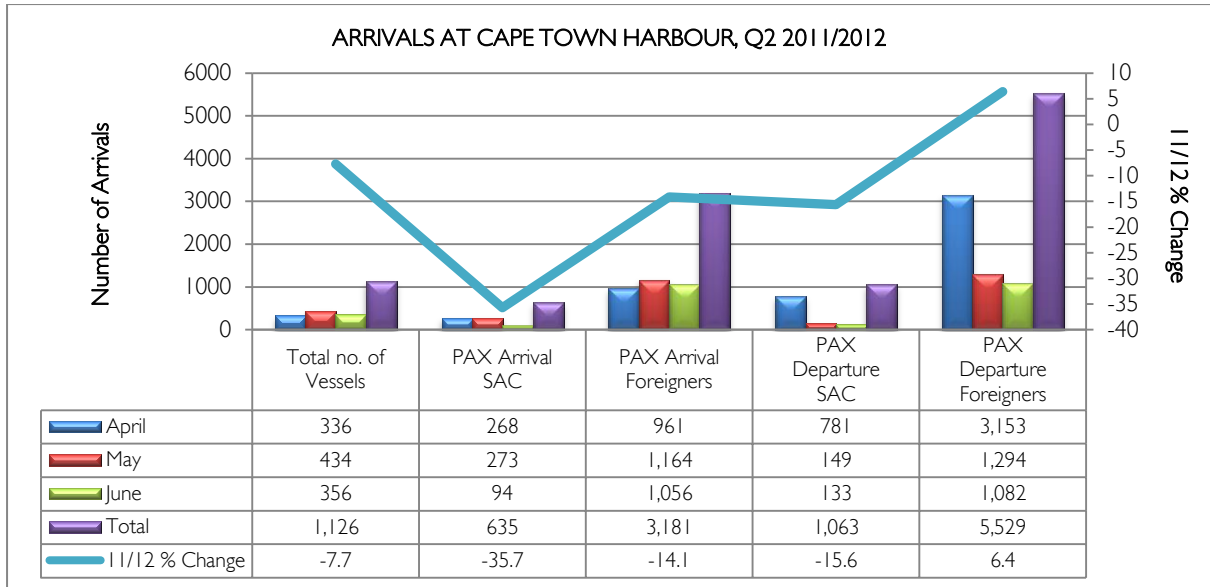
George Airport received a total of 62,851 arrivals in Q2 2012, and experienced an overall year-on-year decrease of 2.8%. A decline in arrivals was recorded across all three months of the quarter, with the highest in May (-3.9%).



Source: ACSA, 2012

6.3 Cape Town Harbour

In Q2 2012, a total of 1,126 vessels entered the Cape Town Harbour, with a total of 635 South African Citizens (SAC) and 3,181 foreign arrivals aboard. Upon departure, a total of 1,063 South African Citizens and 5,529 foreigners embarked on the vessels again.



Source: DHA, 2012