



# Destination Performance Western Cape

January to December 2023

# About this report:

The data used in this report is sourced from the latest South African Tourism (SAT) Annual Tourism Performance statistics, which analyses and provides an overview of the national and provincial tourism performance over the period January to December 2023.

The data aims to reflect overseas tourist arrival trends, foreign expenditure patterns, accommodation usage, length of stay and an indication of the top international source markets to South Africa and the Western Cape.

# Contents

Sections
1. Definitions and Methodology
2. Executive Summary
3. Tourism Performance in South Africa
4. Tourism Performance: Provincial Distribution
5. Tourism Performance in the Western Cape

# Definitions

**Visitor** – Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for travel is other than the exercise of an activity to be remunerated at the place visited.

**Same day visitor** – Any person who visits a place without staying the night.

**Tourist** – A visitor who stays at least one night in the place visited.

**International tourist** – An international visitor who stays at least one night in collective or private accommodation in the country visited.

**Overnight trip** – A journey undertaken by one or more members of the household for at least one night away from home, where the persons travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.

# Methodology

The tourism data represented in this report is based on findings obtained from South African Tourism's Analytics and Insights Unit and is derived from South African Tourism's Departure Survey.

The survey has been deployed by South African Tourism since 2001 to monitor and measure international tourism behaviour upon departing the country.

The survey aims to track tourist travel behaviour, expenditure, accommodation usage, experiences as well as satisfaction of South Africa as a holiday and business destination.

The survey is conducted monthly and covers South Africa's two main international airports (Oliver Tambo and Cape Town), as well as the 12 main land border posts.

Source: Adopted from South African Tourism (SAT) (2024)

# Executive Summary

- The Western Cape held 15.3% of South Africa's tourist arrivals in 2023, reaching 1.3 million in total tourist arrivals and increasing by 42% year-on-year (y-o-y).
- In 2023, the Western Cape ranked as the leading province for overseas tourist arrivals to South Africa, reaching 995,659 tourists and increasing by 43% year-on-year. In relation to 2019, overseas tourist arrivals to the Western Cape in 2023 reached a recovery of 60%.
- Europe maintained its position as the Western Cape's top region for tourist arrivals, with 7 out of the top 10 source markets originating from the continent in 2023.
- UK, Germany and the USA ranked as the Western Cape's leading overseas markets for tourist arrivals in 2023, closely followed by the Netherlands and France in fourth and fifth positions, respectively.
- Total Foreign Direct Spend (TFDS) in the Western Cape reached R23.7 billion in 2023. Bed nights spent in the province totaled to 16.3 million in 2023, resulting in an average length of stay of 13.0 nights in the Western Cape.
- The largest share of tourists to the Western Cape travelled for holiday, with close to 60% recorded in the year 2023. Across all nine provinces, the Western Cape held the highest share of tourists who travelled for holiday, while the Free State attracted the dominant share of tourists visiting friends and relatives.
- When observing key trends in the number of bed nights spent by accommodation category, an evident shift can be seen when comparing the pre and post Covid trends. Pre-Covid (2019), hotels held the largest number of bed nights, accounting for over 7.4 million, while post-pandemic, the family and friends' segment surpassed hotels from the year 2020 and consecutively remained the top accommodation category over the last four years.
- In 2023, the V&A Waterfront (Victoria and Alfred Waterfront) ranked as the top visited attraction across all overseas regions, with the Middle East tourists accounting for the highest share. Cape Town Central City ranked as the second most prominent attraction visited amongst tourists originating from Asia, Australasia, Europe and the Middle East. Table Mountain National Park: Boulders equally ranked as the second most popular attraction visited by tourists from Central & South America and North America.

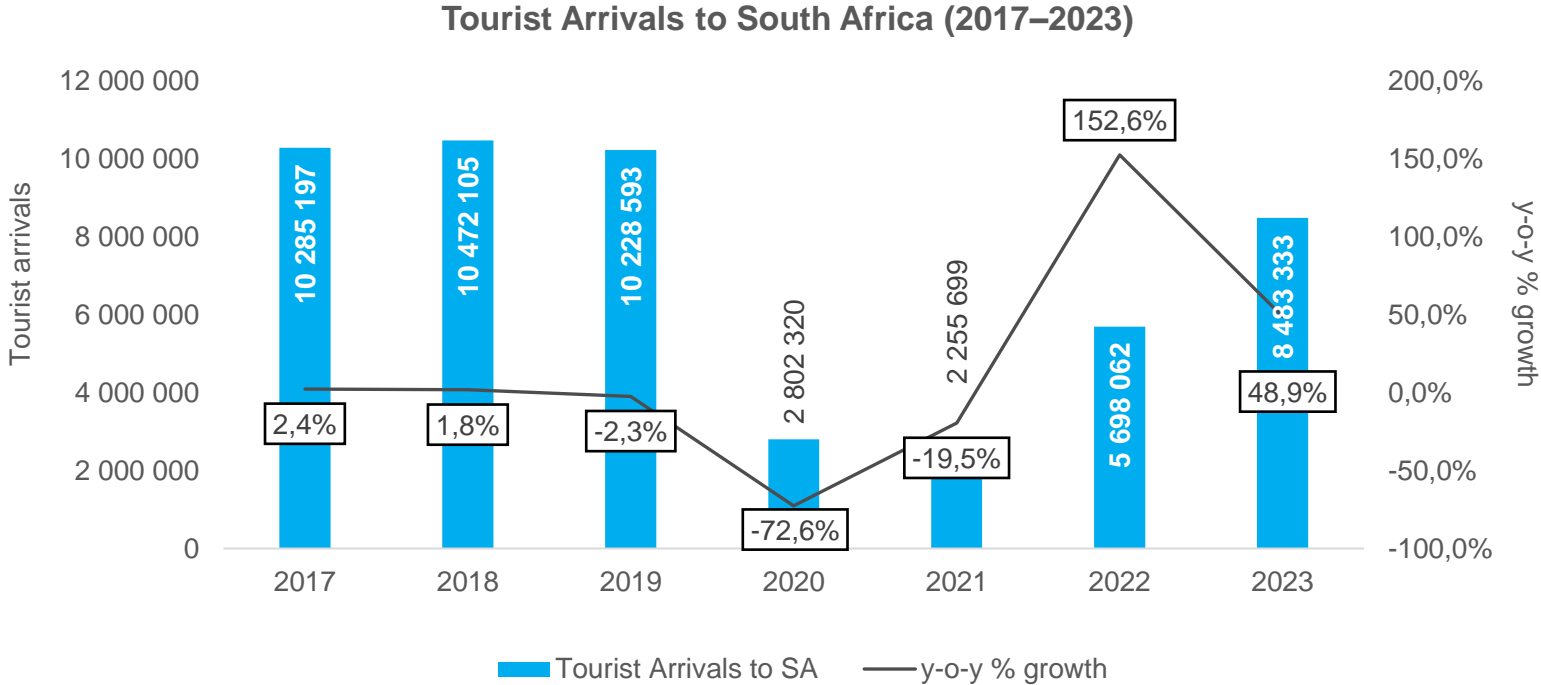
An aerial photograph of a coastal landscape. In the foreground, the ocean is a deep blue with white foam from a boat's wake. The middle ground shows a coastline with a town and a prominent, dark, rocky mountain peak. In the background, a range of mountains stretches across the horizon under a clear, light blue sky.

# Tourism Performance in South Africa

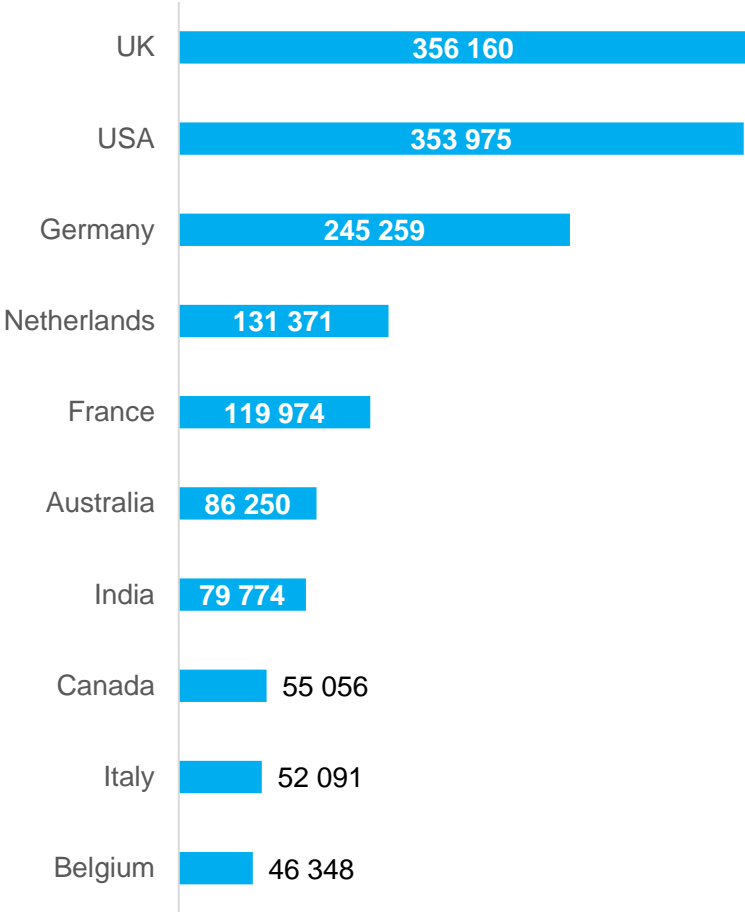


# Tourism Performance in South Africa

- In 2023, South Africa saw a remarkable increase in tourist arrivals, with a total of 8.5 million for the year. This represented an impressive year-on-year (y-o-y) growth of 48.9% from the previous year.
- The UK, USA, Germany, the Netherlands and France ranked as South Africa's top 5 international source markets in 2023.



## Top 10 Overseas Source Markets to South Africa (2023)



Source: SA Tourism (2024)

# Tourism Performance in South Africa

- The 8.5 million tourist arrivals recorded in 2023 translated into a total foreign direct spend of R94.8 billion for the year. Bed nights in South Africa reached 111.8 million in 2023, rising by 61% year-on-year (y-o-y).
- In 2023, tourist arrivals to South Africa spent on average R11,800 per trip and stayed in the country for 13.6 nights.

Tourism Performance in South Africa (2019–2023)						
Tourism Indicator	2019	2020	2021	2022	2023	Y-o-Y % Growth (2023 vs. 2022)
Total number of tourist arrivals	10 228 593	2 802 320	2 255 699	5 698 062	8 483 333	48.9%
Total foreign direct spend (excl. capital expenditure) from tourists	R81.2 billion	R22.3 billion	R20.8 billion	R59.6 billion	R94.8 billion	58.9%
Total number of bed nights spent by tourists	112.3 million	29.8 million	27.5 million	69.5 million	111.8 million	60.9%
Average spend per foreign tourist in SA	R8,300	R8,400	R9,500	R10,900	R11,800	8.3%
Average length of stay in SA	11.4 nights	11.0 nights	12.5 nights	12.6 nights	13.6 nights	8.3%

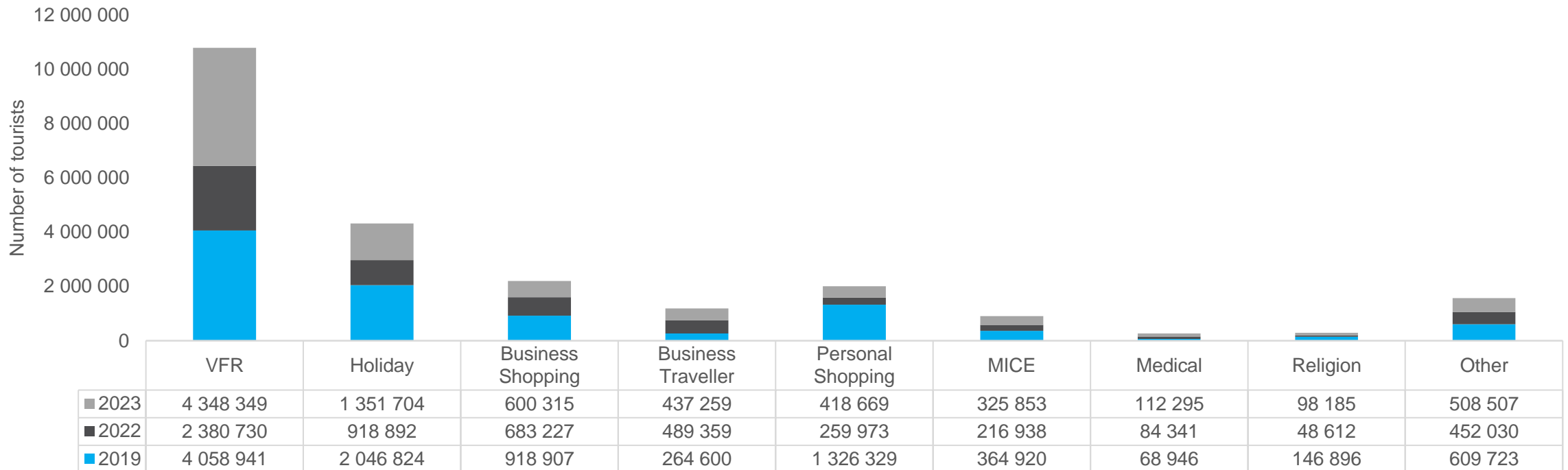
Source: SA Tourism (2024)



# Tourism Performance in South Africa

- Visiting friends and Relatives (VFR) ranked as the leading motivation for travel to South Africa with over 4.3 million tourists recorded, followed by 1.4 million tourists who travelled mainly for holiday in 2023. The business shopping and business traveller segments followed as the third and fourth most prominent reasons for visiting the country.

Main Purpose of Visit to South Africa (2019–2023)



Source: SA Tourism (2024)

An aerial photograph of a coastal landscape. In the foreground, the ocean is a deep blue with white foam from a boat's wake. The middle ground shows a coastline with a town and a prominent, dark, rocky mountain peak. In the background, a range of mountains stretches across the horizon under a clear, light blue sky.

# Tourism Performance: Provincial Distribution

# Tourism Performance: Provincial Distribution

Provincial Tourism Performance (2023)						
Province	Total Tourist Arrivals (millions)	*Overseas Tourist Arrivals (millions)	Africa Tourist Arrivals (millions)	Total Foreign Direct Spend (billions)	Bed Nights (millions)	Length of Stay (nights)
Gauteng	3 685 947	814 913	2 871 034	R41.2	49.6	14.0
Western Cape	<b>1 297 130</b>	<b>995 659</b>	<b>301 471</b>	<b>R23.7</b>	<b>16.3</b>	<b>13.0</b>
Eastern Cape	308 826	231 407	77 419	R4.9	4.2	14.2
KwaZulu Natal	646 228	232 828	413 399	R6.2	7.2	11.6
Mpumalanga	1 835 468	325 173	1 510 295	R7.5	16.6	9.4
Limpopo	562 321	149 109	413 212	R6.3	3.9	7.2
North West	333 797	82 093	251 703	R2.1	3.2	10.3
Northern Cape	109 772	26 425	83 347	R1.0	1.1	12.3
Free State	893 234	34 590	858 644	R1.8	9.6	11.1

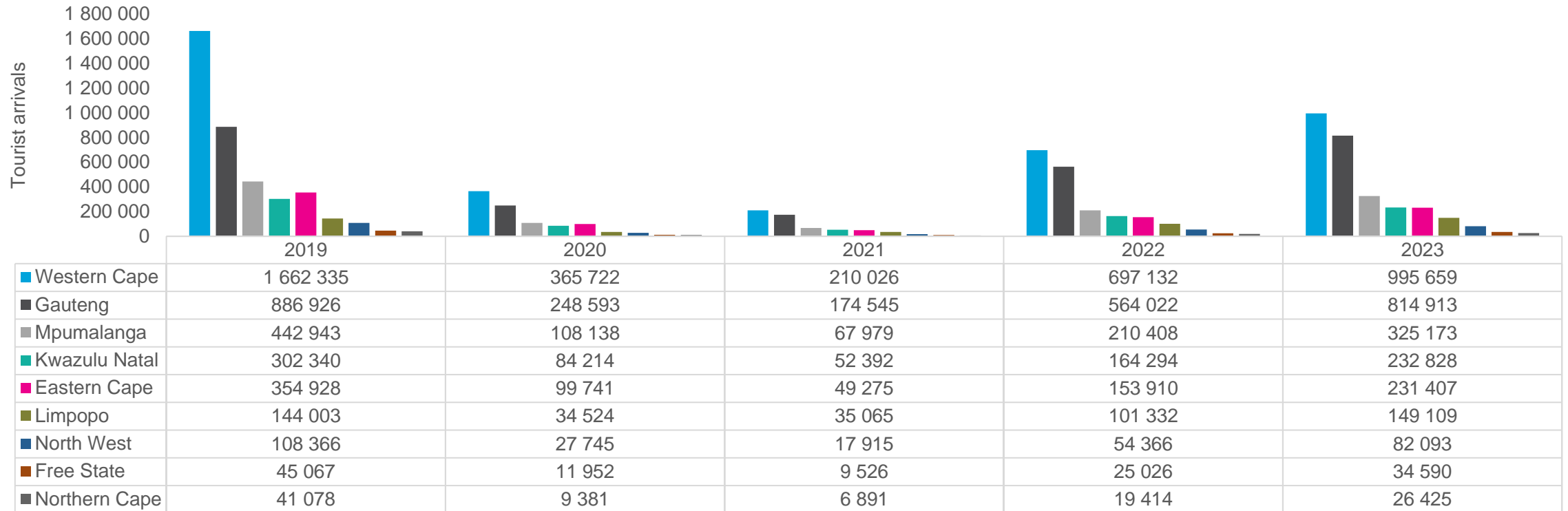
\*Overseas tourists include tourist arrivals from Asia, Australasia, Central & South America, Europe, Middle East and North America.

Source: SA Tourism (2024)

# Tourism Performance: Provincial Distribution

- The Western Cape ranked as the leading province for overseas tourist arrivals to South Africa, reaching 995,659 in 2023, increasing by 42.8% year-on-year and standing at 60% recovery in 2023, in relation to the overseas tourist arrivals recorded in 2019.

**\*Overseas Tourist Arrivals by Province (2019-2023)**



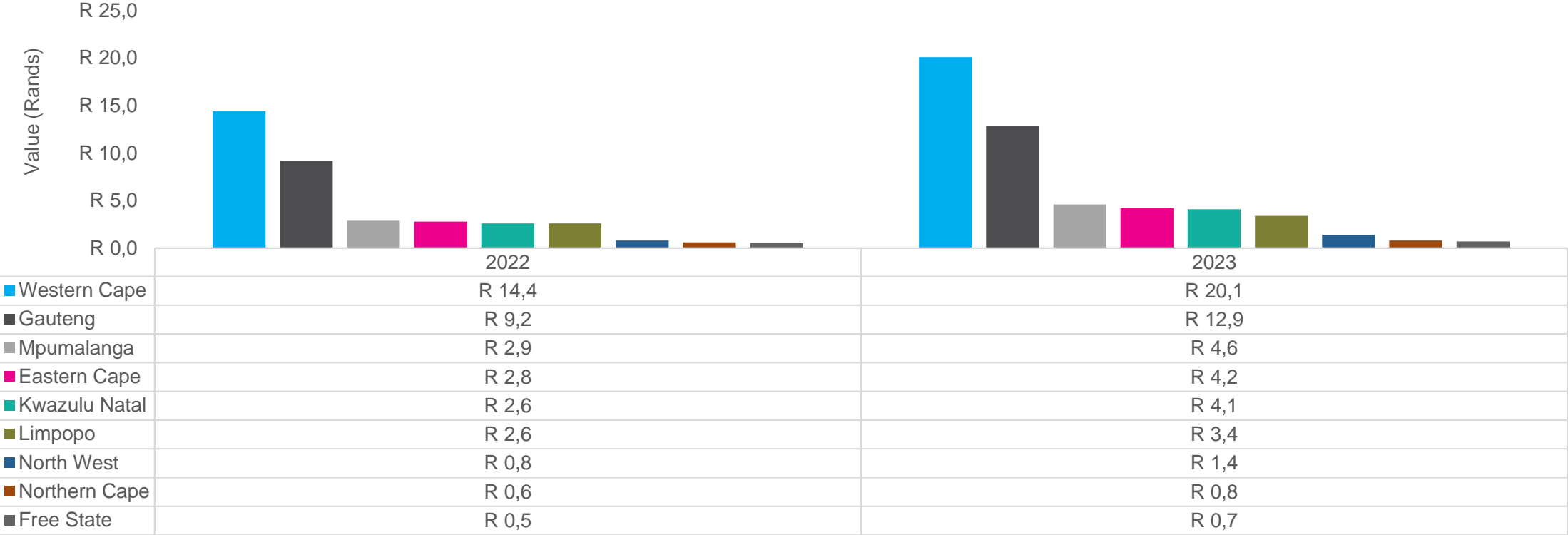
\*Overseas tourists include tourist arrivals from Asia, Australasia, Central & South America, Europe, Middle East and North America.

Source: SA Tourism (2024)

# Tourism Performance: Provincial Distribution

- The Western Cape consecutively ranked as the top province for total foreign direct spend (TFDS) from the overseas market in 2022 and 2023. The Western Cape's TFDS from the overseas market reached a significant R20.1 billion in 2023, increasing by 39.6% year-on-year.

**\*Overseas Tourists Total Foreign Direct Spend (TFDS) by Province (2022/2023)**

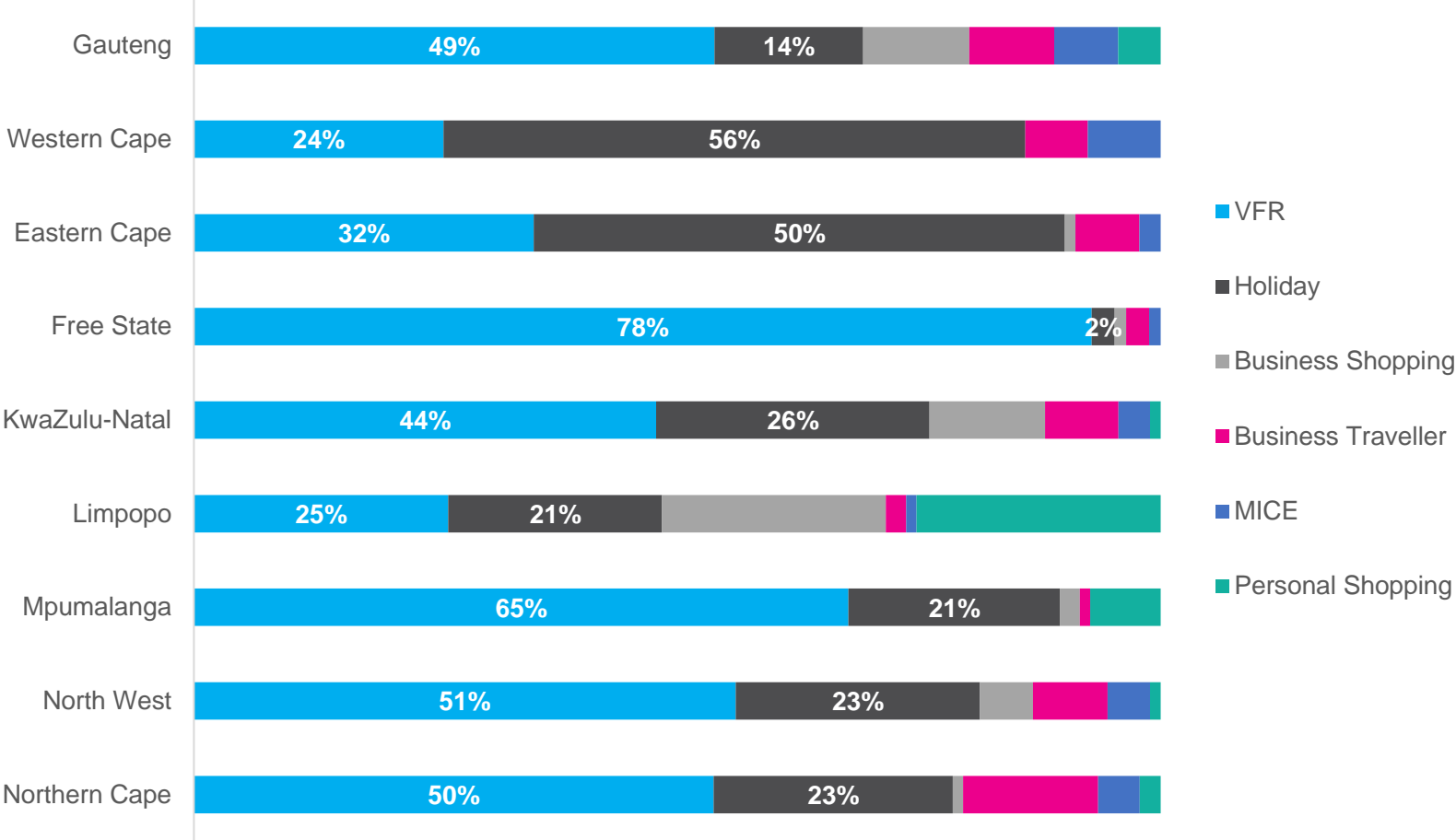


\*Overseas tourists include tourist arrivals from Asia, Australasia, Central & South America, Europe, Middle East and North America.

Source: SA Tourism (2024)

# Tourism Performance: Provincial Distribution

Main Purpose of Visit by Province (2023)



- In 2023, visiting friends and relatives (VFR) and holiday ranked as the leading drivers for travel to South Africa.
- The largest share of tourists to the Western Cape travelled for holiday, with close to 60% recorded in the year 2023.
- Across all nine provinces, the Western Cape held the highest share of tourists who travelled for holiday, while the Free State attracted the dominant share of tourists visiting friends and relatives.

An aerial photograph of the Western Cape coastline, showing the ocean in the foreground, a city nestled at the base of the mountains, and several prominent mountain peaks under a clear sky. The text 'Tourism Performance in the Western Cape' is overlaid in the center.

# Tourism Performance in the Western Cape



# Western Cape Tourism: Tourist Arrival Trends

- The Western Cape held a 15.3% share of South Africa's total tourist arrivals in 2023, attracting 1.3 million tourists in 2023 and increasing by 42.3% when compared to 2022.

Western Cape Tourism Performance Indicators	2019	2020	2021	2022	2023
Total number of tourist arrivals	2 005 095	442 437	299 910	911 745	1 297 130
Overseas tourist arrivals	1 662 335	365 722	210 026	697 132	995 659
Africa tourist arrivals	342 762	76 715	89 885	214 613	301 471
% Share of South Africa's tourist arrivals	19.6%	15.8%	13.3%	16.0%	15.3%

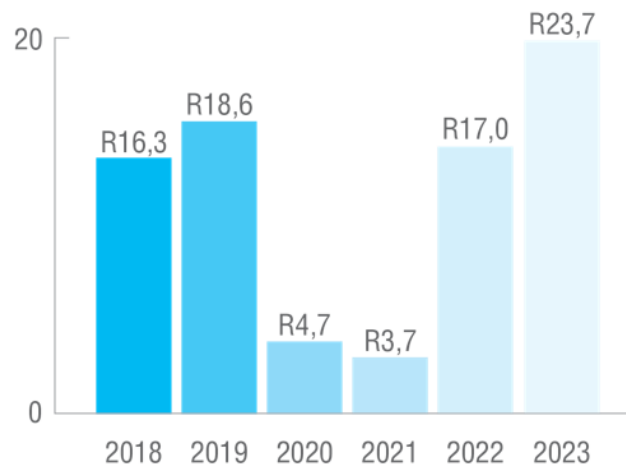
Source: SA Tourism (2024)

# Western Cape Tourism Performance

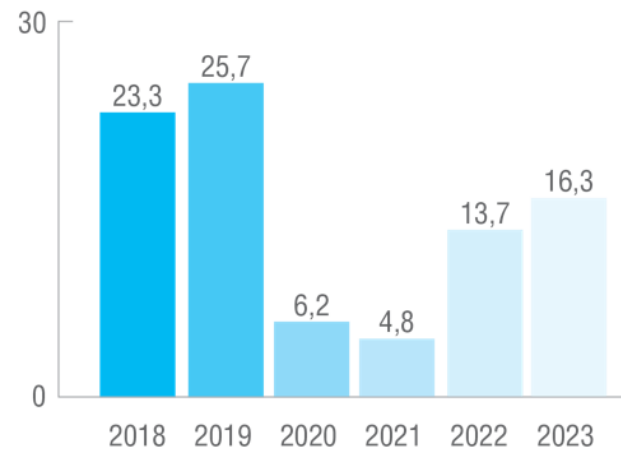
- Total Foreign Direct Spend in the Western Cape reached R23.7 billion in 2023. In addition, bed nights spent by tourists in the province totaled to 16.3 million in 2023, resulting in an average length of stay of 13.0 nights in the Western Cape.



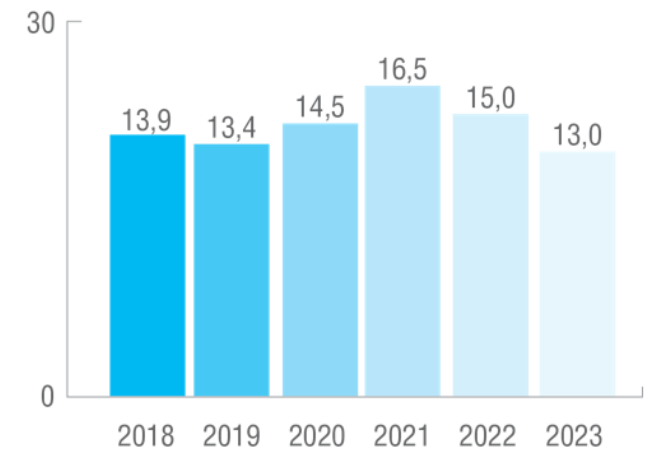
Total Foreign Direct Spend (R billions) in the Western Cape



Total bed nights in the Western Cape (millions)

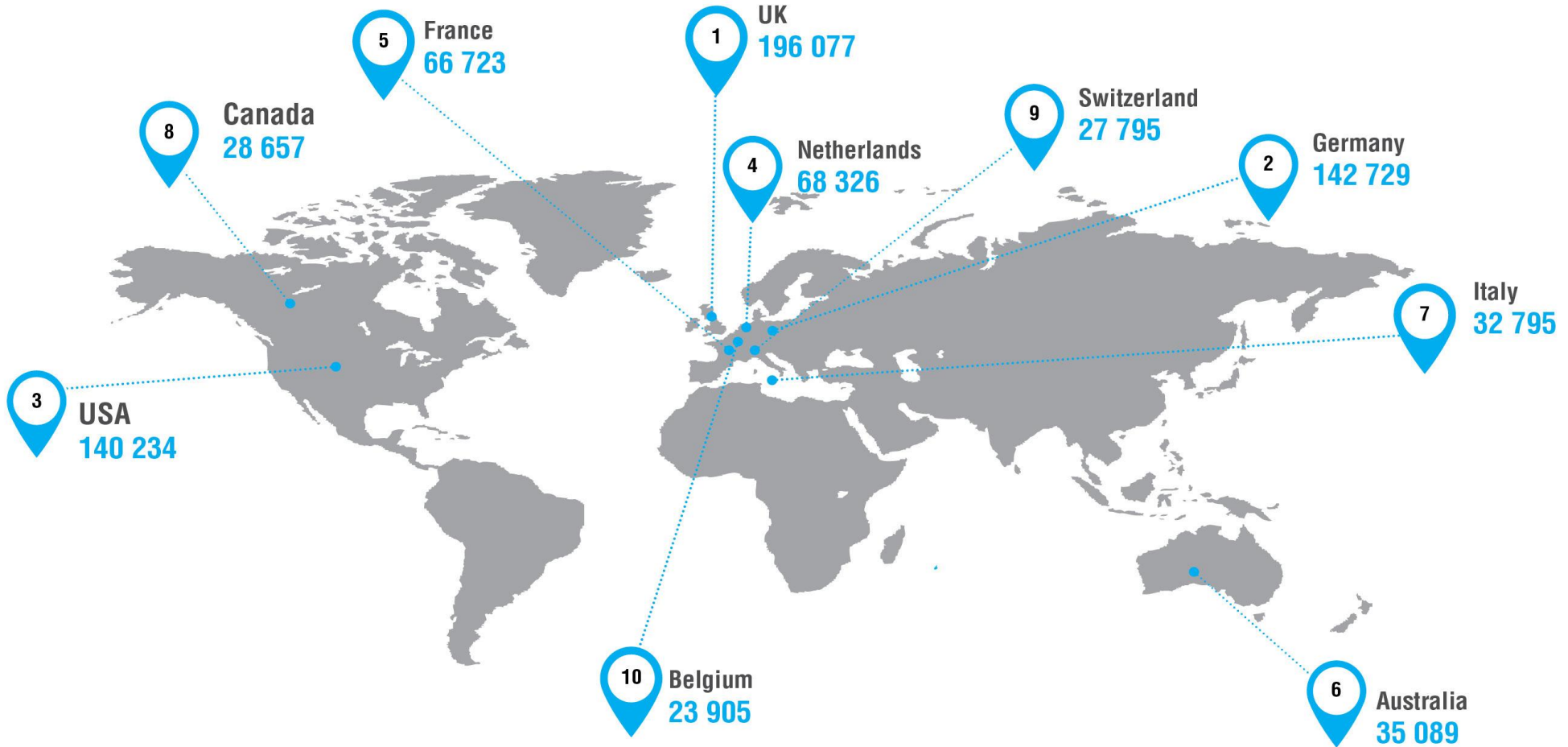


Length of stay in the Western Cape



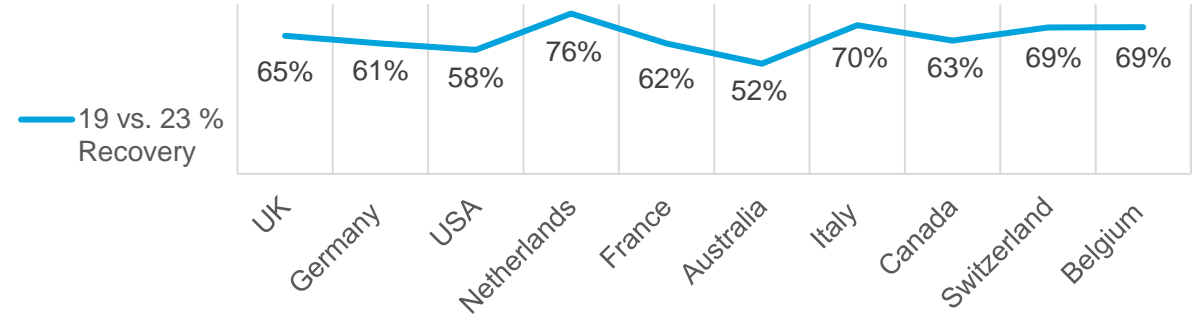
Source: SA Tourism (2024)

# Western Cape Tourism: UK, Germany and USA top overseas markets for tourist arrivals in 2023



# Top Overseas Markets to WC

- The European region maintained its position as the Western Cape's top region for overseas tourists, with 7 out of the top 10 source markets originating from the continent.
- In 2023, two out of the 10 source markets recovered by over 70%, and 6 source markets recovered by over 60% in relation to tourist arrivals recorded in 2019.



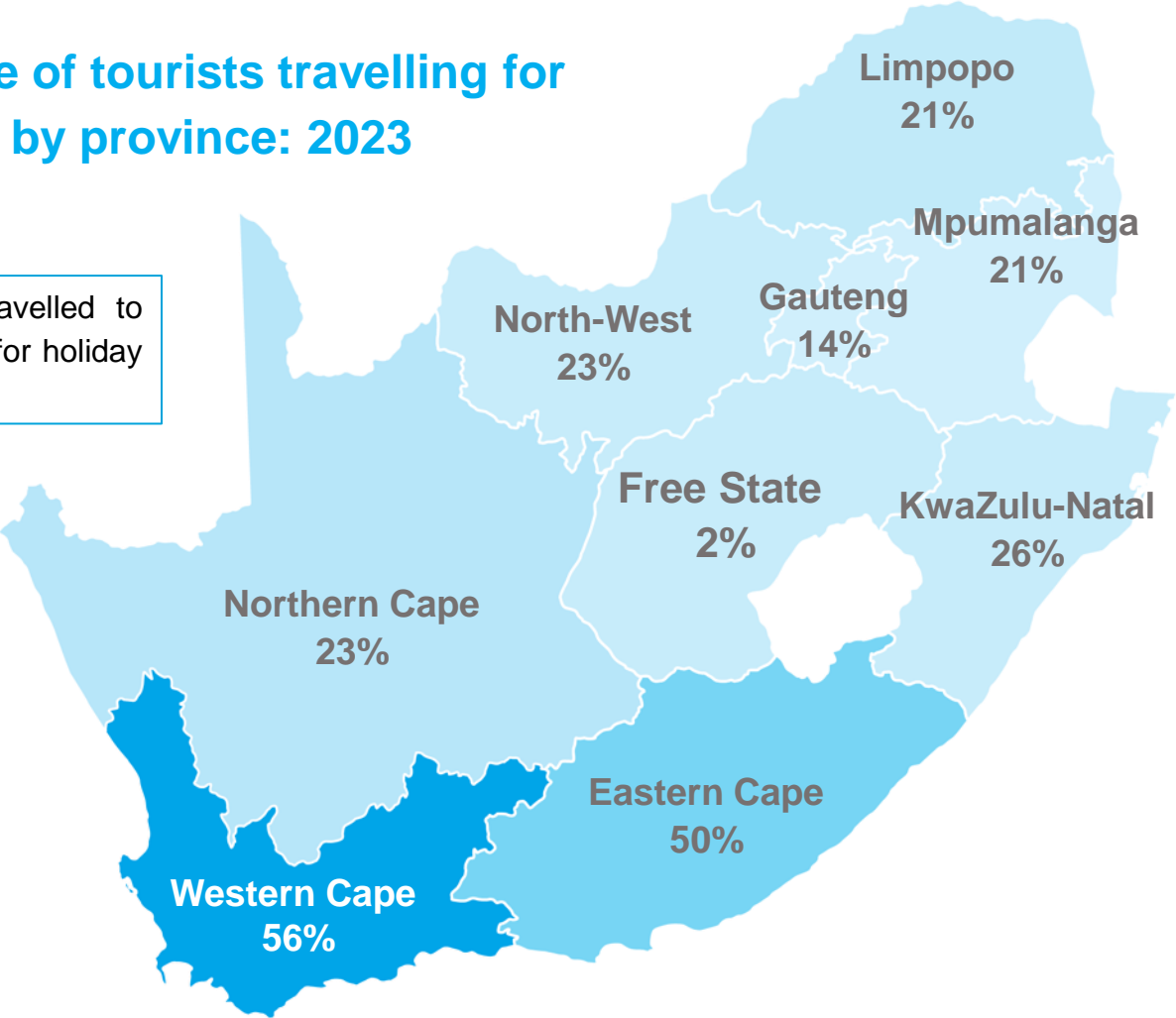
Top 10 Overseas Markets to the Western Cape (2019–2023)

Rank	Markets	2019	2020	2021	2022	2023	y-o-y % change (2023 vs. 2022)
1	UK	301 321	79 017	36 800	150 143	196 077	30.6%
2	Germany	232 353	66 431	32 166	101 197	142 729	41.0%
3	USA	239 989	38 619	34 700	113 300	140 234	23.8%
4	Netherlands	90 431	19 011	13 934	48 572	68 326	40.7%
5	France	108 485	24 154	13 409	42 611	66 723	56.6%
6	Australia	67 571	8 738	5 427	20 790	35 089	68.8%
7	Italy	46 784	6 222	4 342	18 366	32 795	78.6%
8	Canada	45 656	10 386	5 530	17 957	28 657	59.6%
9	Switzerland	40 323	10 373	8 289	21 660	27 795	28.3%
10	Belgium	34 602	7 136	5 018	18 674	23 905	28.0%

# Western Cape Tourism: Tourists to WC mainly travelled for holiday in 2023

## % Share of tourists travelling for holiday by province: 2023

56% of tourists travelled to the Western Cape for holiday in 2023.



Source: SA Tourism (2024)



### Top 5 cities visited in 2023

- Cape Town
- Stellenbosch
- Simon’s Town
- Knysna
- Hermanus



### Top 5 activities undertaken

- Eating out
- Shopping
- Visiting Natural Attractions
- Beaches
- Adventure



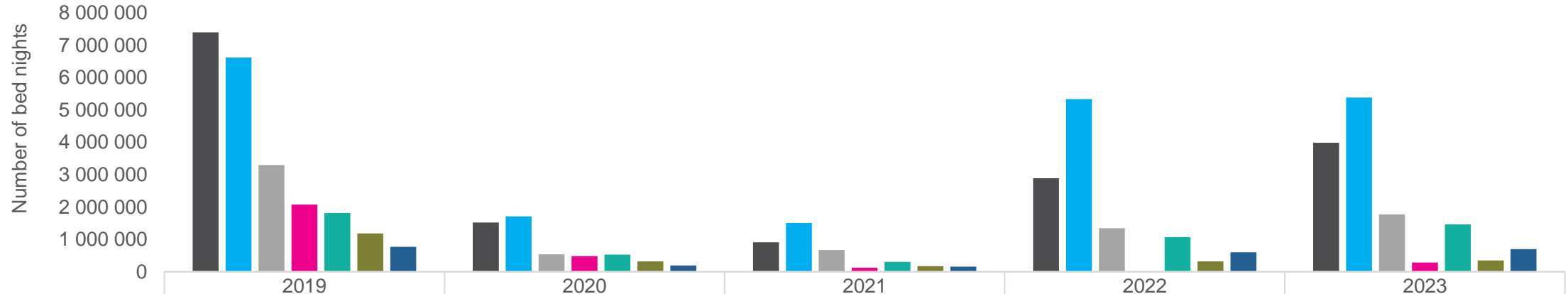
### Top 5 attractions visited

- V&A Waterfront
- Cape Town City Centre
- Table Mountain National Park: Boulders
- Camps Bay
- Cape Point

# WC Bed Nights by Accommodation Category

- When observing key trends in the number of bed nights spent by accommodation category, an evident shift can be seen when comparing the pre and post Covid trends. Pre-Covid (2019), hotels held the largest number of bed nights, accounting for over 7.4 million, while post-Covid, the family and friends' segment surpassed hotels from the year 2020 and consecutively remained the top accommodation category over the last four years.

Western Cape Bed Nights by Accommodation Category (2019–2023)

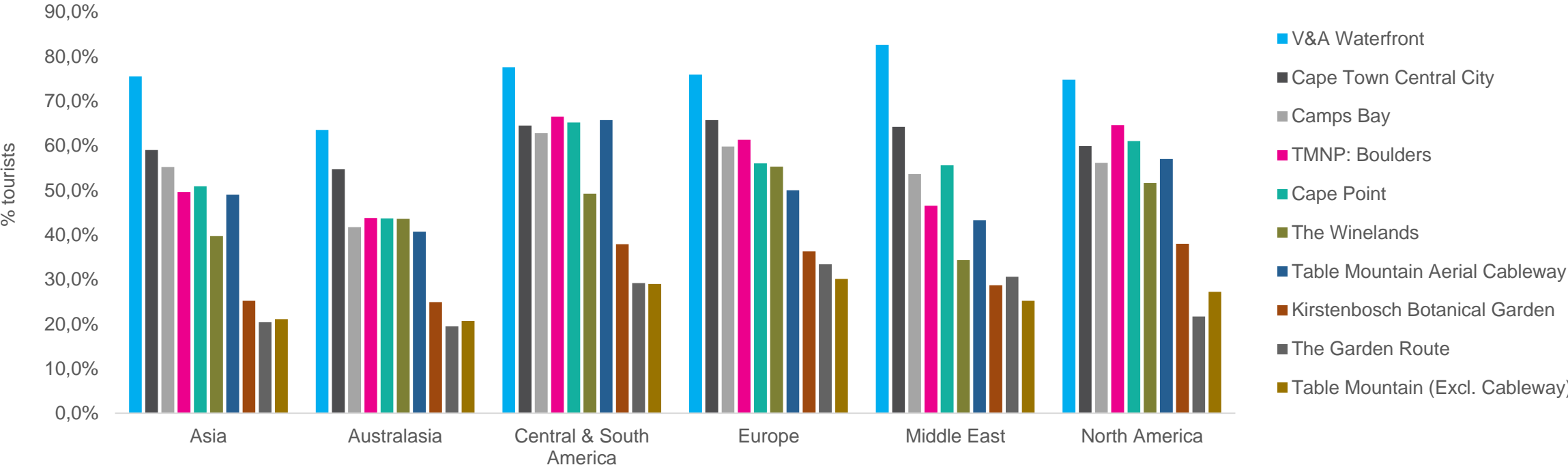


	2019	2020	2021	2022	2023
■ Hotel	7 402 061	1 523 510	909 141	2 891 835	3 989 108
■ Family and Friends	6 619 136	1 713 143	1 505 710	5 335 246	5 384 774
■ Self-Catering	3 299 436	537 285	670 901	1 343 101	1 776 731
■ AirBnB	2 073 856	480 005	124 617	0	288 608
■ Guest House	1 818 438	528 012	303 981	1 072 086	1 462 664
■ Backpacker / Hostels	1 184 377	322 728	175 789	317 963	347 972
■ Bed and Breakfast	772 922	191 380	156 375	599 899	697 684

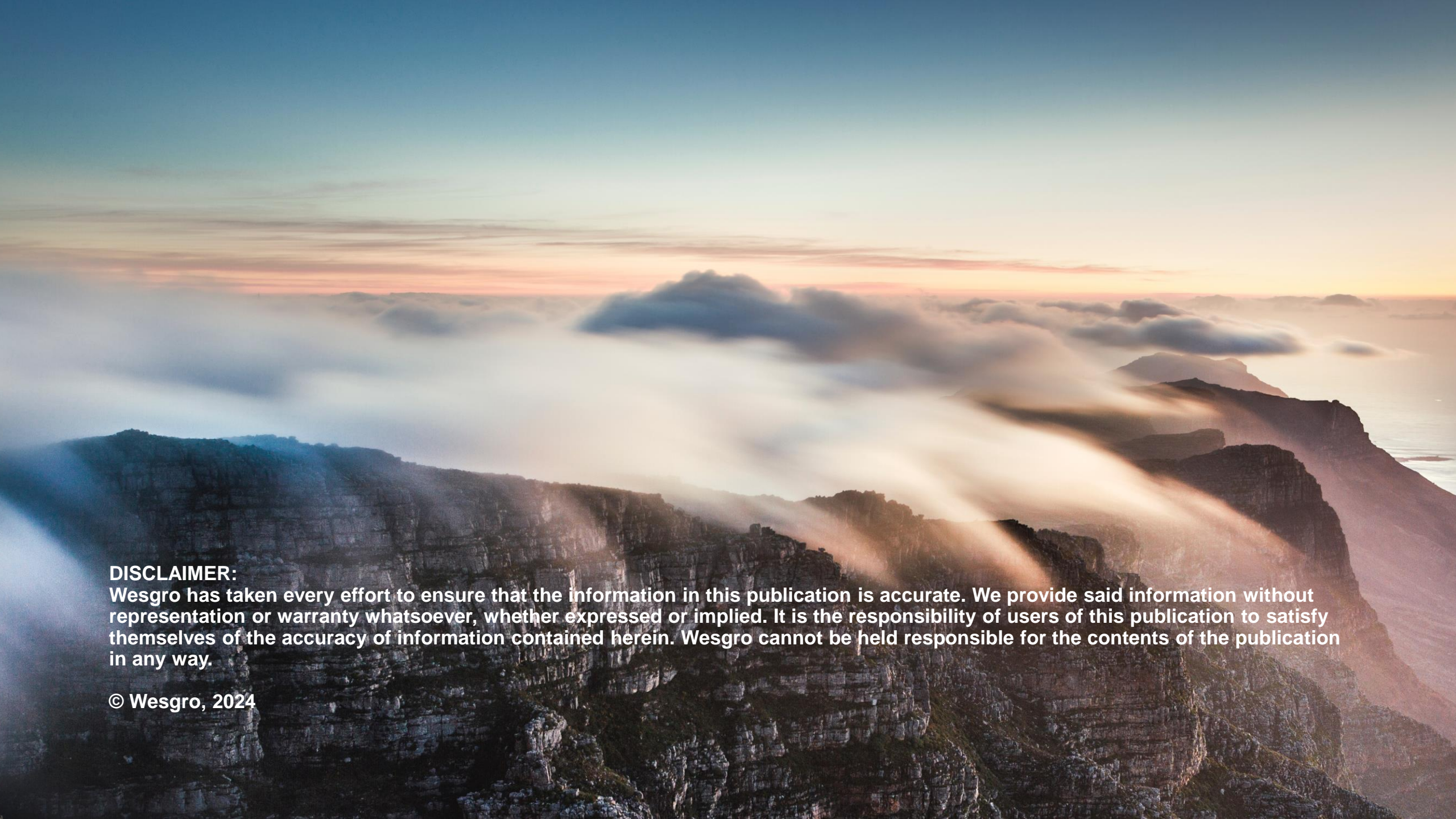
# Top 10 Attractions Visited in the Western Cape by Region

- In 2023, the V&A Waterfront ranked as the top visited attraction across all overseas regions indicated below, with the Middle East tourists accounting for the highest share.
- Cape Town Central City ranked as the second most prominent attraction visited amongst tourists originating from Asia, Australasia, Europe and the Middle East. Table Mountain National Park: Boulders equally ranked as the second most popular attraction visited by tourists from Central & South America and North America.

Top 10 Attractions Visited in the Western Cape (2023)







**DISCLAIMER:**

Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or warranty whatsoever, whether expressed or implied. It is the responsibility of users of this publication to satisfy themselves of the accuracy of information contained herein. Wesgro cannot be held responsible for the contents of the publication in any way.

© Wesgro, 2024