

Western Cape Destination Performance: Domestic Market Annual 2020

Definitions: *Domestic tourist:* A resident visitor who visits within the economic territory of the country of reference.

Domestic visitor: A visitor whose country of residence is the country visited. They may be nationals of this country or foreigners.

Overview of Domestic Trends:

South Africa

- In 2020, a total of 17.0 million domestic trips were taken to South Africa. When compared to 2019, a 40.1% decline was recorded year-on-year.
- Total Direct Domestic Spend within South Africa reached R53.1 billion, registering an increase of 21.0%.
- The average spend per domestic trip reached R3,118 in 2020 and increased by 102.2%.
- The domestic tourism trips lasted for an average of 3.3 nights in 2020, resulting in a total of 56.8 million bed nights.

Domestic Tourism Indicators: South Africa	2017	2018	2019	2020	19/20 y-o-y % change
Total Domestic Trips	17.2 million	17.7 million	28.5 million	17.0 million	-40.1%
Total Direct Domestic Spend	R22.1 billion	R26.4 billion	R43.9 billion	R53.1 billion	+21.0%
Average Spend per Domestic Trip	R1,280	R1,497	R1,542	R3,118	+102.2%
Average Nights per Domestic Trip	4.1 nights	3.9 nights	3.3 nights	3.3 nights	+0.8%
Total Annual Domestic Bednights	70.1 million	69.3 million	94.1 million	56.8 million	-39.6%

Source: SATourism, 2021

Western Cape

- The Western Cape accounted for 13.1% of all South Africa's domestic trips taken in 2020.
- Domestic trips to the Western Cape reached a total of 2.6 million in 2020 and decreased by 40.4% year-on-year.
- Domestic trips injected R6.9 billion into the Western Cape economy, a decline of 11.2% when compared to the R7.7 billion recorded in 2019.
- In 2020, 6.9 million bed nights were spent by domestic visitors in the Western Cape.
- Overnight domestic trips to the Western Cape translated into an average length of stay of 3.1 nights in 2020, slightly less (-18.2%) in comparison to the 3.8 nights recorded in 2019.
- The main driver for domestic trips to the Western Cape was VFR (visiting friends and relatives), accounting for 1.2 million of all trips taken in 2020, followed by 0.9 million who travelled for holiday and over 40,000 travelled for business.

Domestic Tourism Indicators: Western Cape	2017	2018	2019	2020	19/20 % Change
Domestic trips taken from the Western Cape	1 463 000	1 069 750	3 497 635	2 237 510	-36.0%
Domestic trips taken to the Western Cape	1 587 000	1 288 000	4 431 140	2 642 302	-40.4%
Total domestic spend	R1.6 billion	R1.9 billion	R7.7 billion	R6.9 billion	-11.2%
Length of stay in the Western Cape	3.4 nights	3.8 nights	3.8 nights	3.1 nights	-18.2%
Total bed nights spend	5 270 516	4 885 441	16 647 773	6 879 072	-58.7%
Total number of day trips	7 109 000	12 059 237	34 042 053	18 337 639	-46.1%
Main purpose of visit to the Western Cape	Holiday-538 006	VFR-582 118	VFR-1 548 499	VFR-1 203 393	-
	VFR-531 872	Holiday- 426 699	Holiday-1 280 137	Holiday-923 296	
	Business-139 224	Religion-42 359	Business- 112 026	Business- 44 157	

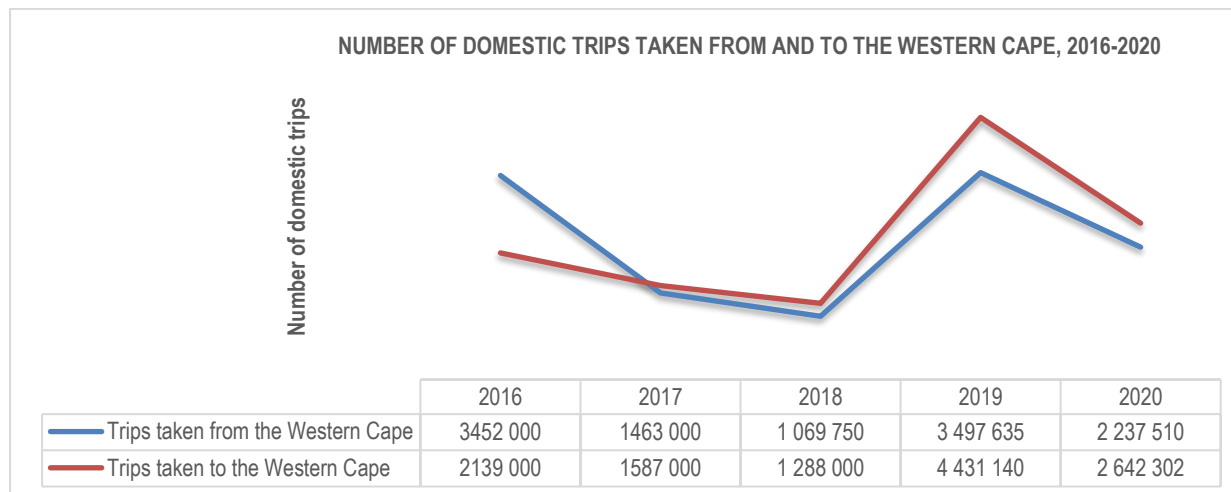
Source: SATourism, 2021

1. Domestic Tourism trends in the Western Cape

1.1 Domestic Trips

In 2020, inward domestic trips to the Western Cape reached 2.6 million and declined by 40.4% year-on-year. Trips taken from the Western Cape portrayed a similar trend, accounting for 2.2 million trips and dropping by 36.0% in 2020.

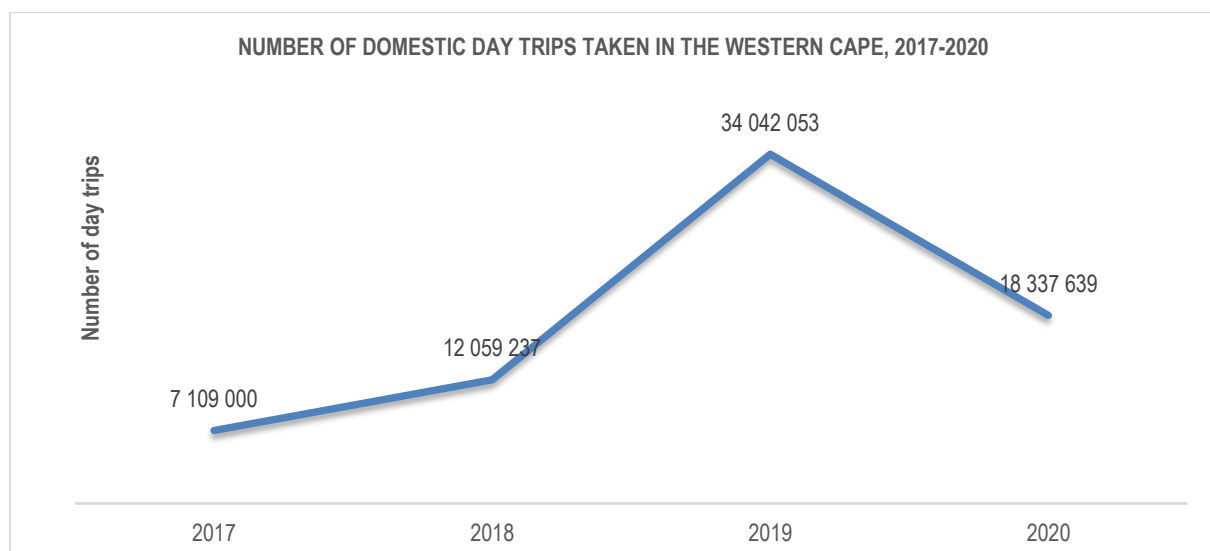
Key findings indicate that South Africans mainly travel to visit their friends and relatives residing in other provinces or in different towns within the same province. However, the year 2020 was hit hard by the outbreak of the global COVID-19 pandemic, the effects of the border closures and economic standstill is evident in the declines experienced in 2020. Given that, the domestic market also played a strong role in kick-starting tourism activity since the gradual reopening of business.



Source: SATourism, 2021

1.2 Domestic Day Trips

Day trips within the Western Cape reached a total of 18.3 million in 2020 and decreased by 46.1%. The dip in day trips can largely be attributed to lockdown restrictions which resulted in locals being unable to travel. The below trend echoes the regional visitor patterns which reflects a strong share of domestic travel originating from the Western Cape. The popularity in day trips can largely be attributed to the close proximity of the Western Cape regions. Most of the Western Cape wine farms are easily accessible and within driving distance of the Cape Metropole, and one of the Western Cape's best land and sea-based whale watching spots is just over an hours' drive from Cape Town, located in the popular town of Hermanus. These tourism offerings amongst many others makes the Western Cape an ideal province for day trips, weekend getaways and domestic travel overall.

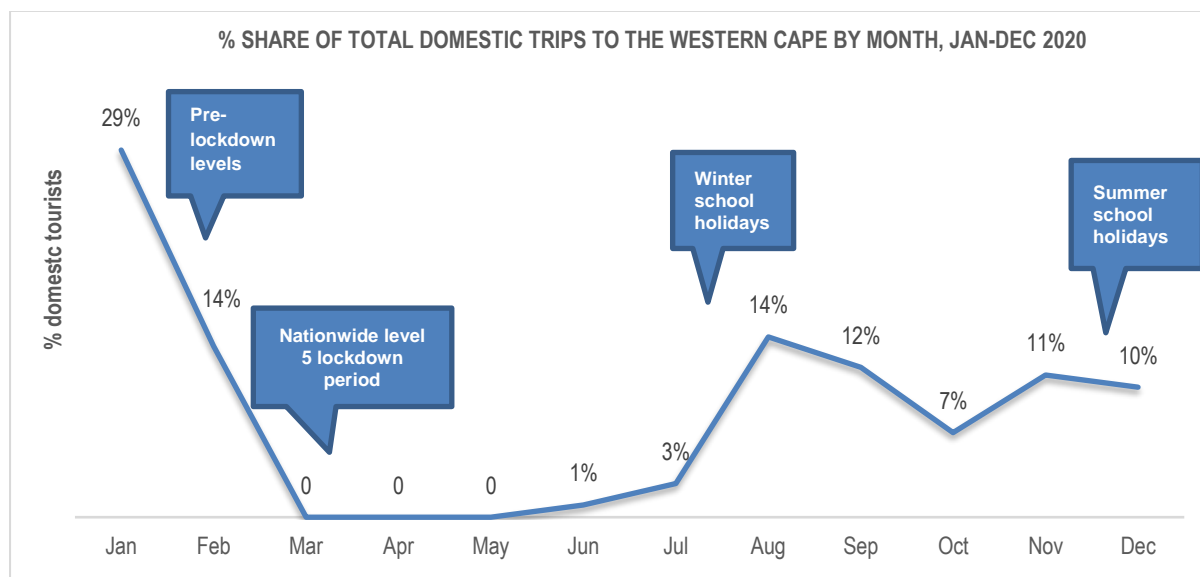


Source: SATourism, 2021

1.3 Domestic Trips to the Western Cape by Month

During 2020, the month of January recorded the highest (29%) share of trips taken to the Western Cape. However, the months January and February depicts the pre-lockdown levels in domestic travel. No domestic trips were recorded between March and May as this period was hit hard by the nationwide lockdown level 5 which commenced on the 26th March 2020.

A gradual uptick can be seen from June as lockdown restrictions started to ease and local travel reopened. The second quarter of the school calendar also ended on the 24th July which could have likely contributed to the peak in domestic trips during August 2020 (14%). Apart from the dip in October, domestic trips to the Western Cape remained steady between 10% and 12% from September to December.



Source: SATourism, 2021

1.4 Origin of Domestic Trips to the Western Cape

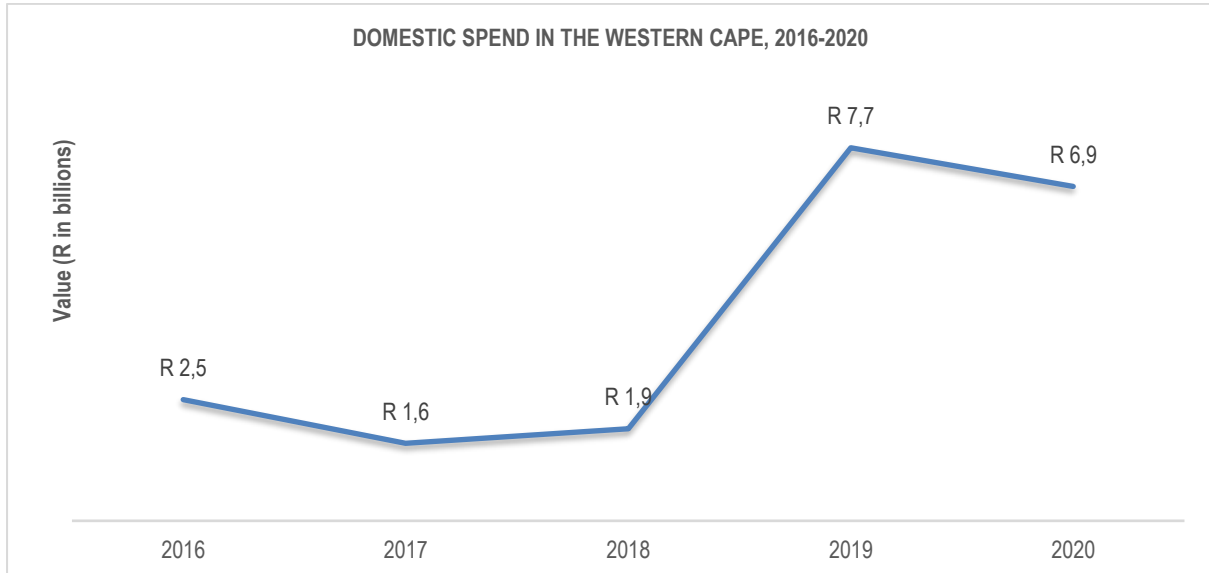
From the figure depicted below, domestic trends indicate that the Western Cape's largest share of domestic trips originated from within the Western Cape (76.5%). The second and third largest share of trips to the Western Cape were taken from the Eastern Cape (10.5%) and Gauteng (6.9%) respectively.

Origin/Destination	Gauteng	KwaZulu Natal	Eastern Cape	Western Cape	North West	Limpopo	Free State	Mpumalanga	Northern Cape
Gauteng	32.2%	14.2%	1.9%	6.9%	34.2%	47.1%	13.7%	41.9%	3.9%
KwaZulu-Natal	11.3%	70.1%	3.2%	2.7%	0.0%	2.1%	9.0%	8.6%	0.0%
Eastern Cape	9.7%	11.6%	85.4%	10.5%	0.0%	0.0%	3.3%	2.4%	0.0%
Western Cape	4.4%	0.0%	9.0%	76.5%	4.2%	0.0%	1.0%	0.0%	28.4%
North West	17.2%	0.8%	0.0%	1.0%	48.3%	15.2%	9.5%	0.7%	7.4%
Limpopo	10.4%	1.4%	0.0%	0.0%	0.0%	24.0%	0.0%	20.7%	0.0%
Free State	5.2%	0.8%	0.6%	0.2%	2.8%	3.2%	51.0%	0.0%	6.8%
Mpumalanga	7.9%	0.0%	0.0%	0.0%	0.0%	6.9%	4.7%	25.6%	0.0%
Northern Cape	1.7%	1.0%	0.0%	2.3%	10.5%	1.6%	7.9%	0.0%	53.5%

*Note: Destination province reads across and origin province reads down. Source: SATourism, 2021

1.5 Domestic spend in the Western Cape

Although there is still a significant share of domestic tourists who indicated that they either cannot afford to travel, are unemployed or see no reason to travel, the Western Cape welcomed over 2.6 million domestic tourists in 2020 which translated into R6.9 billion in domestic revenue. In spite of the impact of COVID-19 on the Western Cape's tourism sector, the trend indicated below confirms the resilience of the domestic market and the solid economic value it holds.

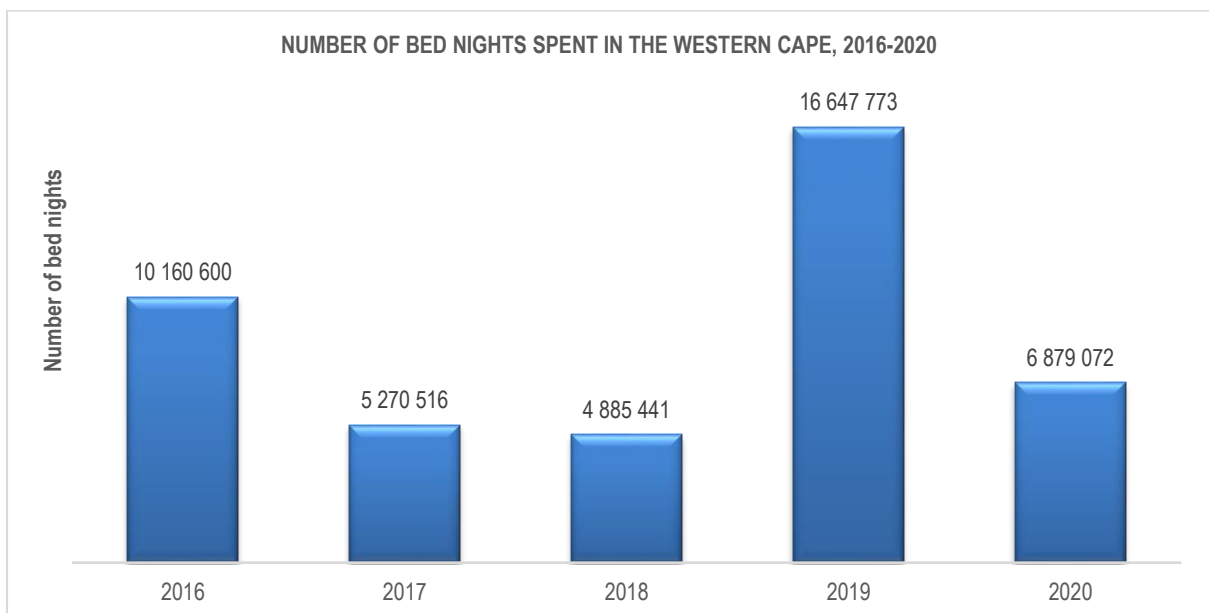


Source: SATourism, 2021

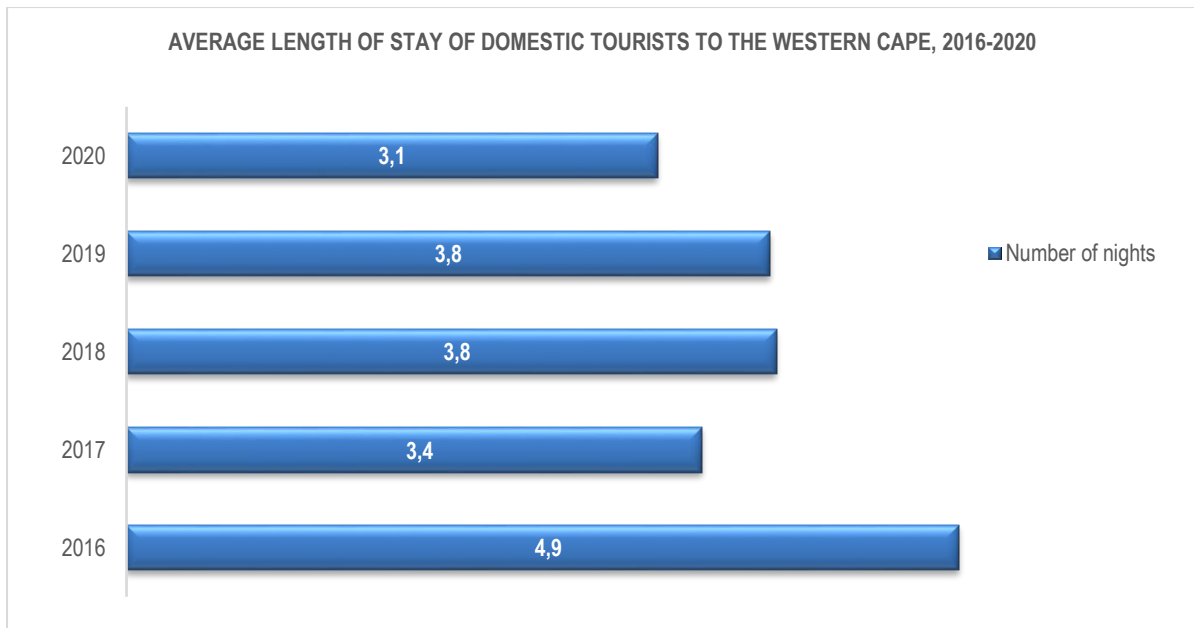
1.6 Bed nights and average length of stay

The Western Cape held 6.9 million domestic bed nights in 2020 and declined by 58.7% year-on-year. In ranking order, the Western Cape held the 4th largest number of bed nights amongst all provinces in 2020.

The domestic overnight traveller spent on average 3.1 nights in the Western Cape, indicating that domestic tourists continued to enjoy weekend getaways to the Western Cape in spite of strict travel regulations. Domestic trends also revealed that the largest proportion of domestic tourists specifically travelled to visit friends and relatives.



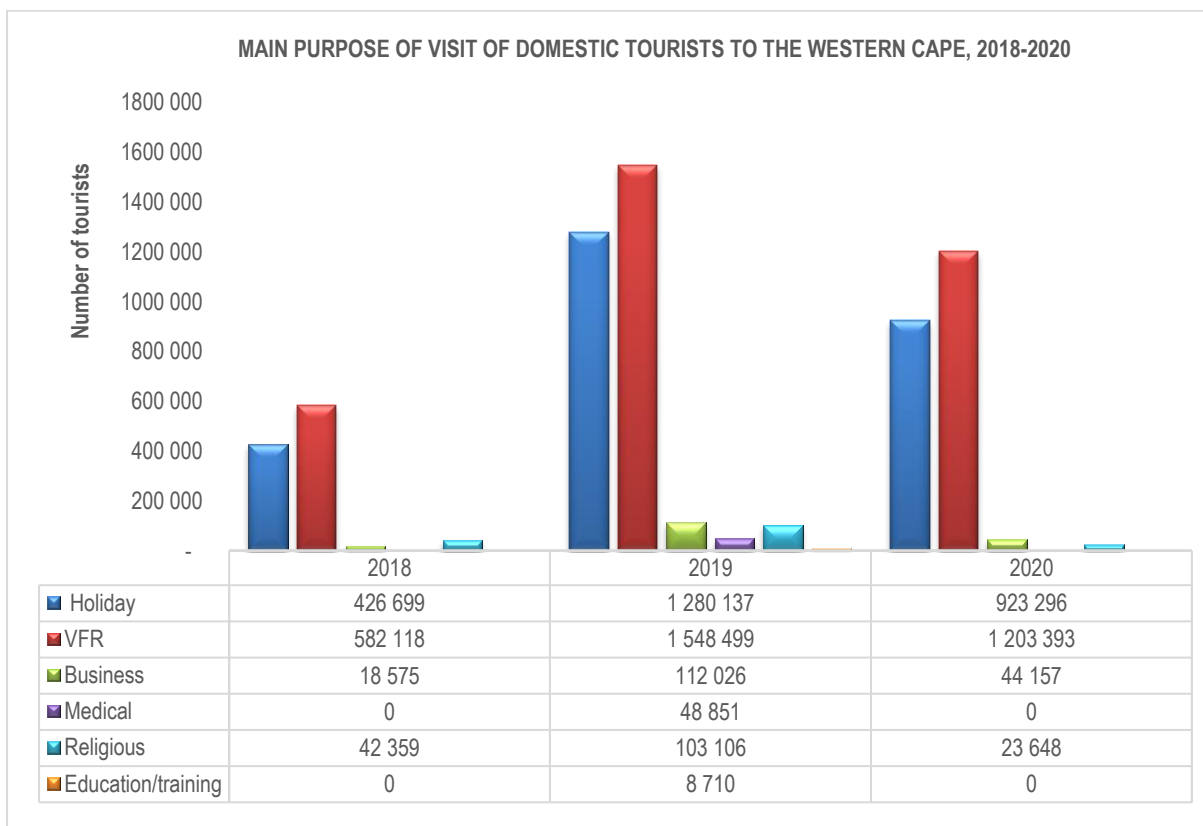
Source: SATourism, 2021



Source: SATourism, 2021

1.7 Main purpose of visit

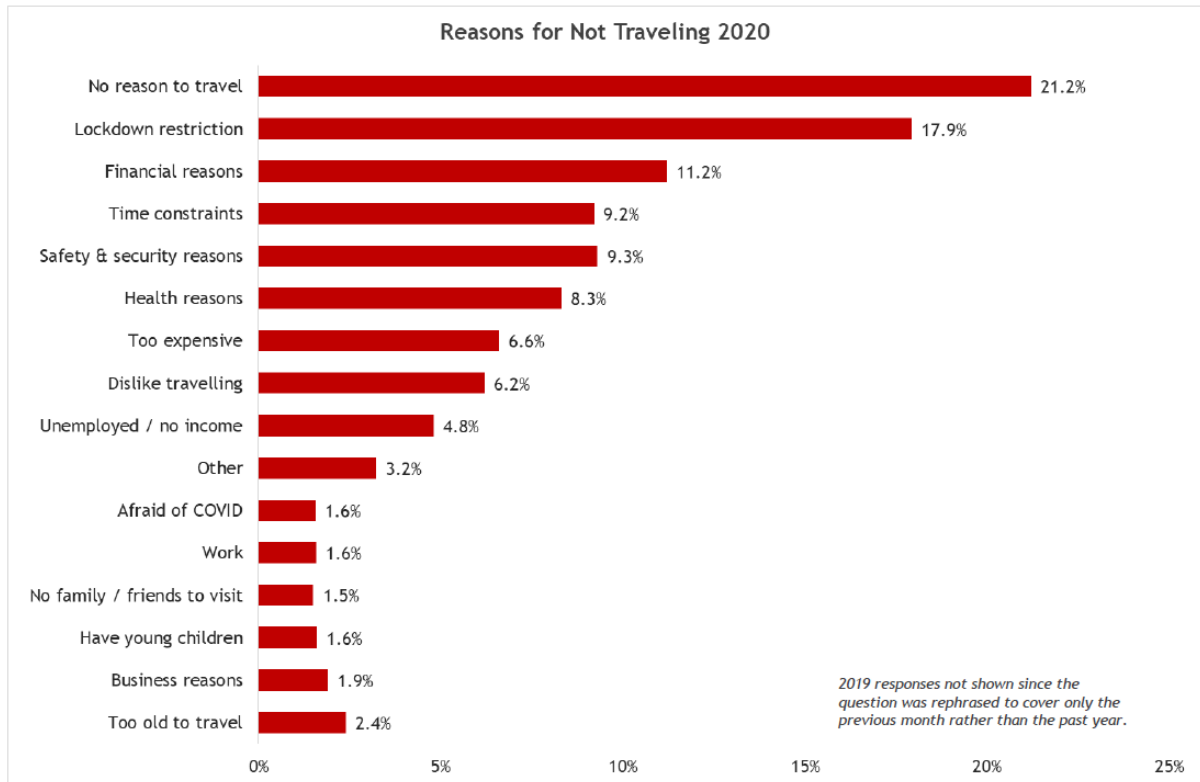
Visiting friends and relatives (VFR) dominated as the main driver for domestic travel across the last three years. Holiday ranked as the second most popular reason for domestic travel to the Western Cape, indicating that tourists continued to travel for leisure purposes once restrictions have eased in the province.



Source: SATourism, 2021

1.8 Main reasons for not taking a Domestic Trip

The most prominent reason why South Africans did not take a domestic overnight trip in 2020 was “no reason to travel” (21.2%), followed by lockdown restrictions (17.9%) and financial reasons (11.2%). Explicit fear of COVID-19 was hardly indicated (1.6%), however, general health reasons emerged amongst 8.3% of tourists.



Source: SATourism, 2021

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