



# SCFEOT

3 May 2023

Jean Scheltema: Acting Wesgro CEO  
Monika Iuel: Destination Marketing Officer



# Wesgro is the Official Tourism, Trade & Investment Promotion Agency for Cape Town and the Western Cape

First point of contact for foreign investors and local companies. Attracts and facilitates national and international investment, works to grow the exports of products and services, and markets the Western Cape as a competitive business and travel destination.

# WESGRO

**Investment Attraction & Facilitation**  
(incl Invest SA One Stop Shop)

**Trade Promotion & Facilitation**  
(incl Film & Media)

**Tourism Promotion & Facilitation**  
(incl Convention Bureau)

**Marketing and Innovation**  
Central Knowledge Hub

**Edu Access**

**Cape Town Air Access**

**Cruise Cape Town**

# Season performance and recovery: the result of many efforts

## 1. Western Cape Performance

- International tourism: from recovery to growth
- Domestic tourism: recovery underway

## 2. Destination Innovation

- Tourism tech: pioneering new ways to market
- Driving geographic spread through digitisation
- Combatting seasonality through digitisation

## 3. Connectivity

- Air connectivity: exceeds historic levels
- Cruise: bumper season underway





# 1. Western Cape Tourism Performance

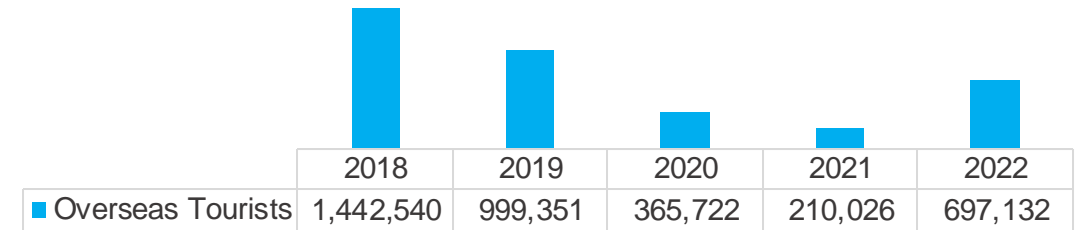


# Tourism Trends Western Cape top province for overseas markets, CY2022

In 2022 the **Western Cape** ranked **top** on following metrics

- Arrivals: 697,132
- Total Foreign Direct Spend: R14.4 billion
- Total bed nights: 9.7 million and
- Total formal bed nights: 2.7 million

Overseas Tourists to the Western Cape, 2018-2022



PROVINCIAL TOURISM PERFORMANCE BY OVERSEAS TOURIST ARRIVALS, 2022						
Province	Overseas Tourist Arrivals	2022/21 % Change in Overseas Tourist Arrivals	2022/19 % Recovery in Overseas Tourist Arrivals	Total Foreign Direct spend (billions)	Total Bed-nights	*Formal Bed Nights
Gauteng	564,022	223%	88%	R9.2	6,579,500	1,291,000
<b>Western Cape</b>	<b>697,132</b>	<b>232%</b>	<b>70%</b>	<b>R14.4</b>	<b>9,674,700</b>	<b>2,727,000</b>
Eastern Cape	153,910	212%	65%	R2.8	1,869,100	650,600
KwaZulu Natal	164,294	214%	78%	R2.6	2,123,100	521,600
Mpumalanga	210,408	210%	70%	R2.9	1,631,000	761,500
Limpopo	101,332	189%	104%	R2.6	1,238,200	401,800
North West	54,366	204%	68%	R0.8	542,600	189,400
Northern Cape	19,414	182%	77%	R0.6	255,400	77,900
Free State	25,026	163%	75%	R0.5	358,000	76,500

\***Formal bed nights**- All paid bed nights, excluding hospital, camping, train and ship accommodation.

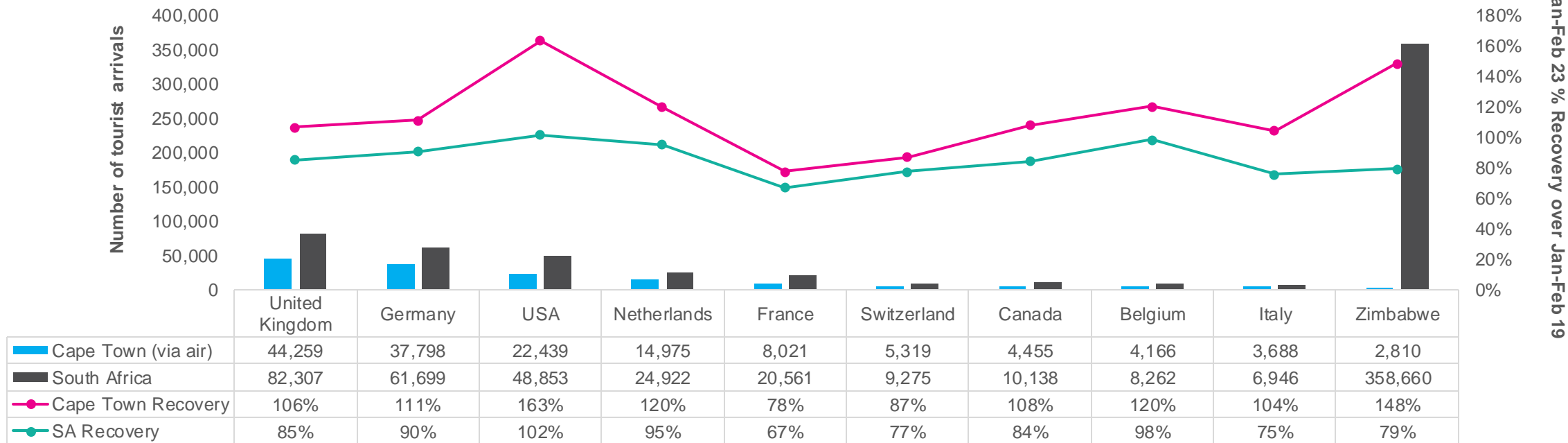
Source: SA Tourism, 2023

\***Overseas Market** represents tourists from Asia, Australasia, Central & South America, Europe, Middle East and North America. **Excludes Africa**

# Tourism Trends Top markets to Cape Town (via air) as at Feb 2023

- United Kingdom top source market to Cape Town (via air), followed by Germany, USA, Netherlands & France
- 7 out of the top 10 source markets to Cape Town originates from Europe.
- 8 out of the top 10 source markets to Cape Town fully recovered between January and February 2023 against the same period in 2019. These markets included the UK (106%), Germany (111%), USA (163%), Netherlands (120%), Canada (108%), Belgium (120%), Italy (104%) and Zimbabwe (148%); France (78% recovery) and Switzerland (87% recovery),

Recovery in Top 10 Source Markets to Cape Town (via air) and South Africa, Jan-Feb 2019/2023



# Wesgro's International Footprint FY23 Over 2400 trade and media engagements



# International trade engagements Season update

- Vakantiebeurs Jan 2023 in Utrecht
- Travelution Destination Event Jan 23, BeNeLux (virtual)
- Porto Wine Week and Travel Show Feb 2023 in Porto
- Africa Showcase South Europe Feb 2023 in Paris, Madrid and Milan
- SATTE and SA Tourism India Roadshow Feb 2023
- ITB March 2023 in Berlin
- WTM Africa April 2023 in Cape Town
- Meetings Africa



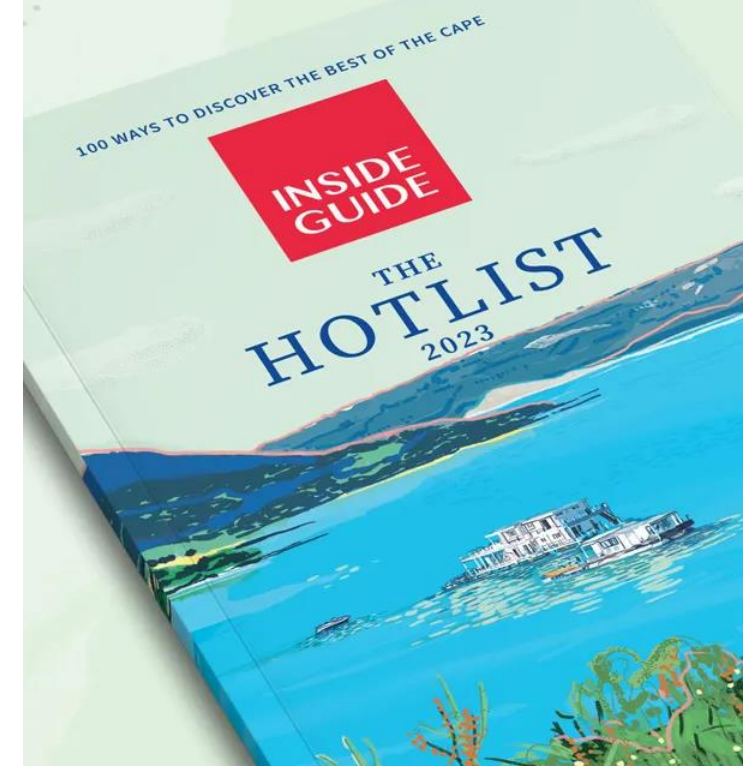


## Domestic trade engagements Season update

- Cape of Great Events Conference (with DEDAT, DCAS and Department of the Premier)
- #HappyBirthdaySAWine - developed a series of assets including videos, maps, wine tourism collateral and white label wine tourism logos for the industry to promote the campaign
- Cape Nature partnership – domestic online / radio marketing campaign ahead of the Easter / school holidays.
- Inside Guide partnership to promote top 100 experiences

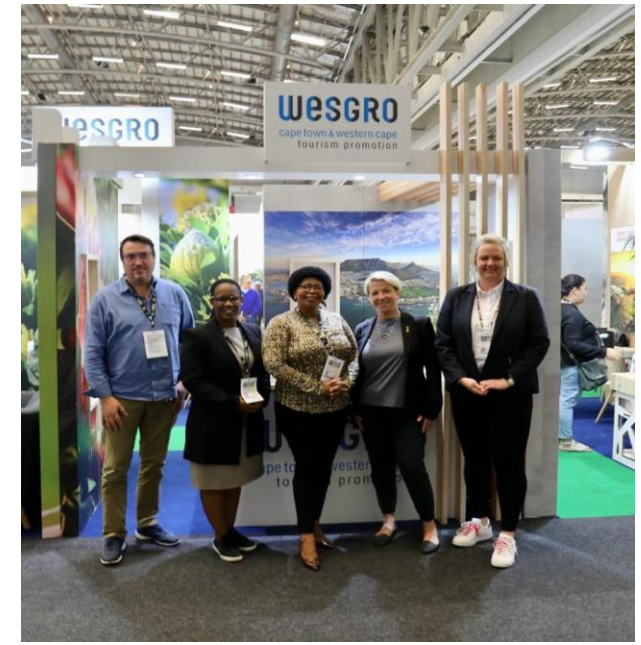
# Discover the Cape's Top 100 Experiences

BUY THE MAGAZINE



# African market reach Season update

- SA Tourism Africa Trade Webinar - (Central, East & Land)
- SA Tourism CEL Africa Mega FAM - hosting 80 agents / buyers in March 2023 for a full day experience in-destination
- ICCA Africa Chapter Meeting (Meetings Africa) - attendance





# Community tourism Multiple integrated initiatives held

21 x Cruise Tourism agents were hosted by Cruise Cape Town in Langa. The tour showcased community tourism, encouraging partners to expand tour options for cruise ships.

## Additional events included:

- Die Hart Van Die Helderberg Arts Festival
- Cape Karoo Cook Off
- Poetry in Kayamandi, Stellenbosch
- Lokxion Foundation Cultural evening
- #US4US Movement
- Cape Town Carnival



# Destination Innovation





International campaign Winner of Gold at CIFFT awards in Japan

*The* Neverending  
**Tourists**



3.3 Million Views on YouTube

# Destination Innovation Climb Table Mountain yielding impressive results

**9 million** impressions

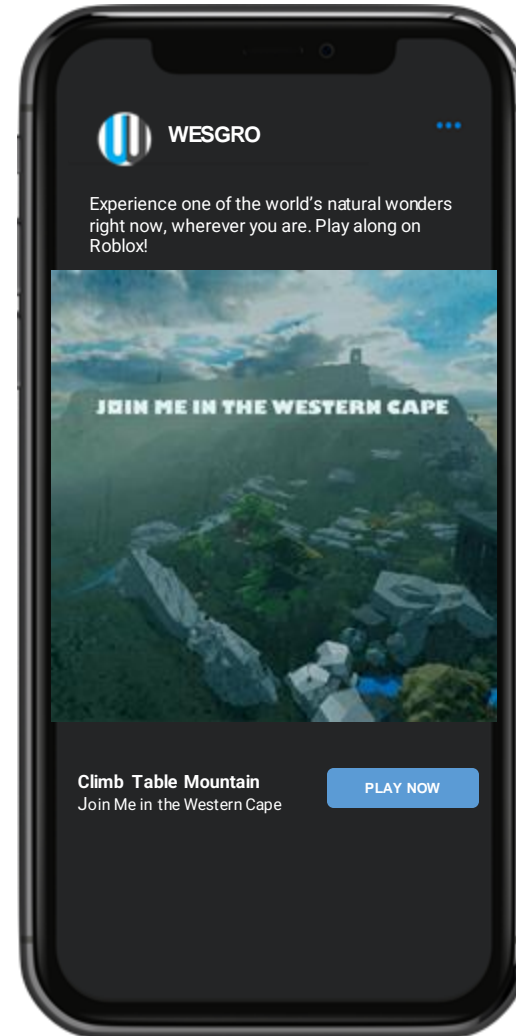
**500 000** views

**45 000** clicks

**3** global awards

- Game time on average is **8 minutes** – with the average player **returning 4 times**
- Game has been favourited nearly **1 000** times

Attracted global players from US, UK, Germany, Brazil, Mexico and Japan



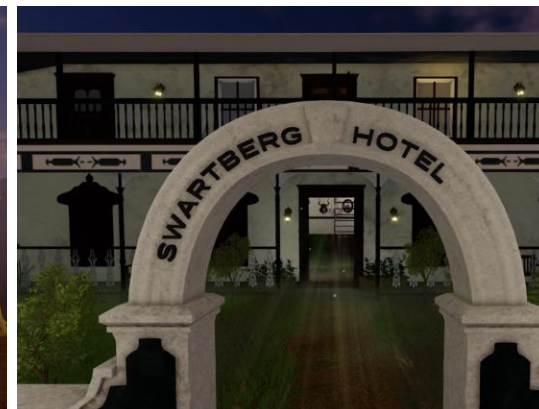




Starlight Adventures in  
**THE CAPE KAROO**

## Destination Innovation: Stargazing in the Cape Karoo upcoming

- May launch to encourage regional spread in the June/ July winter school holidays
- Wimpy brand partnership – capturing roadtrip market
- Soft launch on the Roblox platform to get up game play and irradiate any technical glitches before official launch in May
- Game characters based on real life individuals in Prince Albert: museum built in the metaverse





An aerial view from a high altitude, looking out from an airplane window. The wing of the aircraft is visible in the foreground, extending from the bottom right towards the center. Below the wing, a vast expanse of white, fluffy clouds stretches across the horizon. In the background, the sun is setting or rising, creating a bright, golden glow that illuminates the clouds and the sky. The sky transitions from a deep blue at the top to a lighter, hazy blue near the horizon. A semi-transparent blue rectangular box is overlaid on the image, containing the word "Connectivity" in white text.

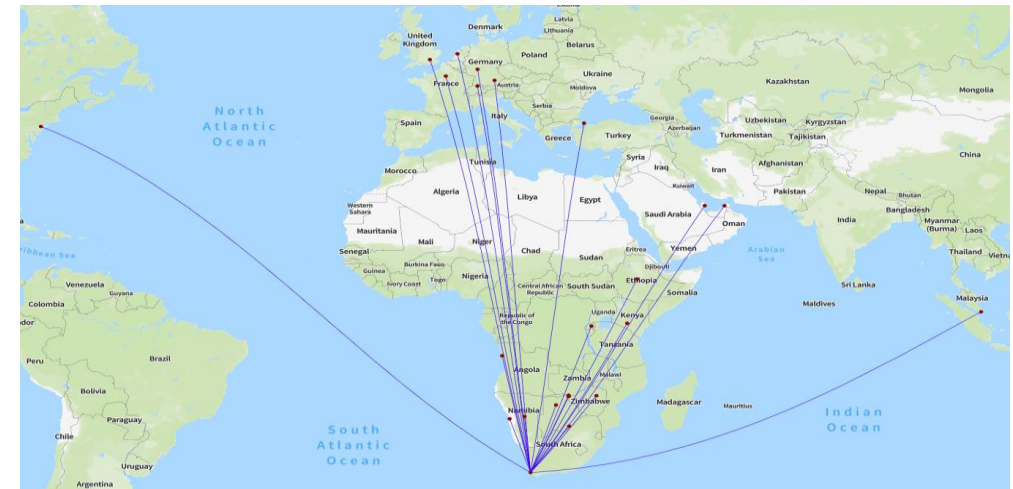
# Connectivity

# Air Connectivity Cape Town Airport International passengers at full recovery, Mar 2023

- International two-way passengers through CTIA reached 1.89 million over the period Jan – Dec 2022
- 73% recovery in 2022 (full year) vs 2019
- Full recovery in February and March 2023

Year/Month	2019	2020	2021	2022	2022 month			2023 month		
					Oct	Nov	Dec	Jan	Feb	Mar
Two-way passengers	2 606 398	810 811	525 441	1 895 975	175 648	211 944	270 433	280 430	258 970	272 955
Passenger recovery*	100%	31%	20%	73%	83%	84%	96%	101%	107%	103%

## Operating carriers





# Air Connectivity Cape Town Airport: Domestic passengers at 75% recovery in Mar 2023

- Domestic two-way passengers through CTIA reached 5.96 million over the period Jan – Dec 2022
- 71% recovery in 2022 (full year) vs. 2019
- +75% recovery January - Mar 2023.

Year/Month	2019	2020	2021	2022	2022 month			2023 month		
					Oct	Nov	Dec	Jan	Feb	Mar
Two-way passengers	8 363 307	3 167 542	4 221 365	5 960 826	528 817	510 108	569 693	515 017	507 787	577 855
Passenger recovery*	100%	38%	50%	71%	73%	73%	72%	79%	78%	75%

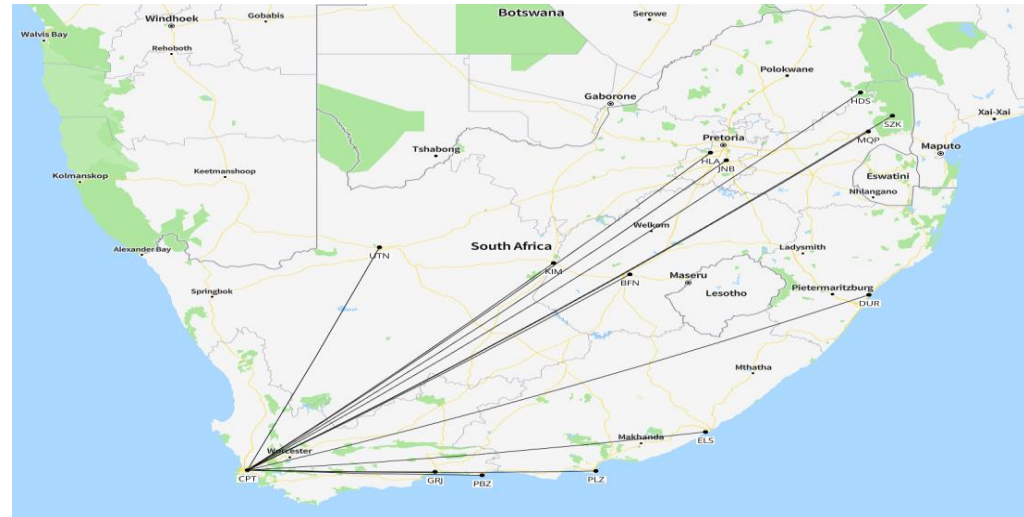
## Operating carriers



SOUTH AFRICAN AIRWAYS



AIRLINK



# Cruise Cape Town Update

- Relatively new industry, with great potential
- Cruise Terminal Capacity 300 000 arriving pax per annum
- **2022/23 Performance (Oct 2022 - May 2023)**
  - 75 Ship visits & 41 Turnaround calls in Cape Town during the season.
    - 19 World Cruises (Around the world); 27 International Coastal; 29 Domestic Coastal
    - Mossel Bay received 14 cruise ships this season.
  - 135 000 pax and 40 000 crew arrived through the Cape Town Cruise Terminal from Oct 2022 until mid April 2023.
  - First season to welcome 3 ships into port simultaneously, all doing turnaround visits on the same day. Estimating approximately 8000 arriving passengers on the same day per visit. This season had 5 of these occasions.
- **2023/24 Plans (Oct 2023 until May 2024)**
  - 58 Ship visits & 33 Turnaround calls in Cape Town during the season
    - 21 World Cruises (Around the world); 33 International Coastal Cruises; 4 Domestic Coastal Cruises
  - 7 new ships: Coral Geographer, Silver Spirit, Swan Hellenic Diana, Ambience, MSC Splendida, MSC Poesia, Norwegian Dawn
- **Industry Trends:** Size: deeper, wider, broader; Shoreside power; Carbon nett zero by 2050; Access to sustainable fuels



# Cruise Cape Town Cruise Lines Season 2023/2024

## Domestic Coastal



## International Coastal



## World Cruises



# Port of Mossel Bay Cruise tourism development underway

## Cruise Development progress in collaboration with Wesgro, TNPA and Mossel Bay Tourism.

- 2022/23 Season expected 22 ships visits & 14 were successful (cancellations due to weather)
- 2 ships in port the same day.
- Improve & update cruise tour offerings.
- Improve current constraints.
- Port of Entry status 1 Nov 2022, immigration & custom services





A scenic landscape of a mountain range at sunset or sunrise. The sky is a mix of blue, orange, and yellow, with soft clouds. The mountains are rugged and layered, with some peaks shrouded in mist. A semi-transparent blue banner is overlaid across the middle of the image, containing the text "THANK YOU" in white, uppercase letters.

THANK YOU