

THE DEPARTMENT OF ECONOMIC DEVELOPMENT, ENVIRONMENTAL AFFAIRS AND TOURISM

EASTERN CAPE ANNUAL TOURISM BAROMETER 2015



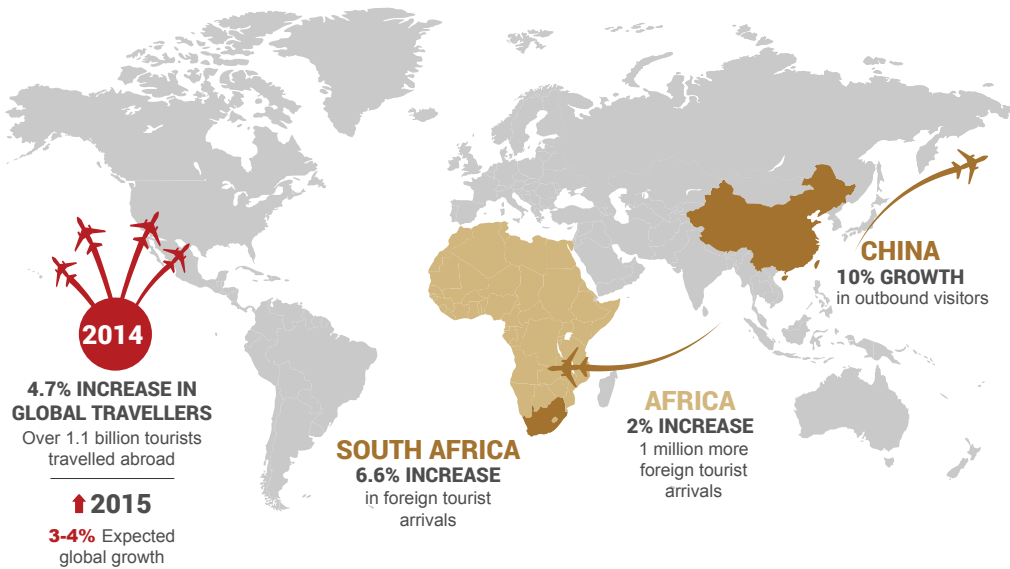
Province of the
EASTERN CAPE

ECONOMIC DEVELOPMENT,
ENVIRONMENTAL AFFAIRS & TOURISM
INNOVATION FOR SUSTAINABLE DEVELOPMENT

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EASTERN CAPE ANNUAL TOURISM BAROMETER 2015

2014's HIGHLIGHTS



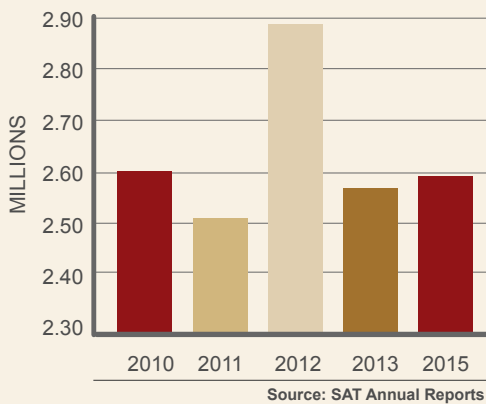
- Over 1.1 billion tourists travelled abroad in 2014, with a recovery noted in the international travel and tourism market, and a 4.7% increase in travellers from 2013.
- African markets grew by 2% and received 1 million more foreign tourist arrivals in 2014.
- UNWTO expects travel and tourism to continue to grow in 2015. With declining oil prices the sector is expected to grow globally by 3-4%.
- SA has experienced consistently good growth performance in the tourism sector. 2014 saw foreign arrivals to SA up but the strong growth trend is expected to have eased off for 2015.
- South Africa saw an increase in foreign tourists by 6.6% in 2014 up from 2013. Tourist numbers from investment markets such as China and Brazil were down in 2014- these changes are attributed to statistical methodology changes as well as impact of visa rules and fears of Ebola.
- Domestic tourism data shows that the key SA Tourism metrics of holiday trips, length of stay and spend per trip all dropped in 2014.
- The low domestic growth environment and the effect of visa regulations are expected to negatively effect growth expectations for 2015.

Source: SAT Tourism Review 2015; UNWTO, 2015

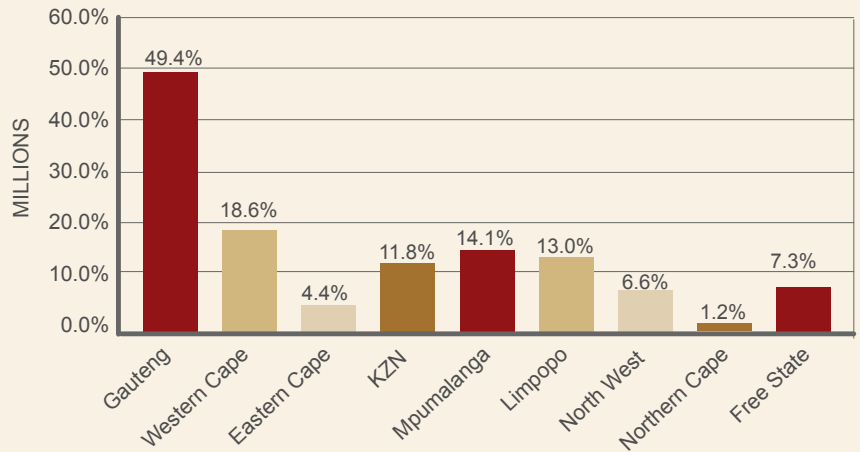
SA TOURISM HIGHLIGHTS 2014



SA VISITORS AIR MARKETS 2010-2014



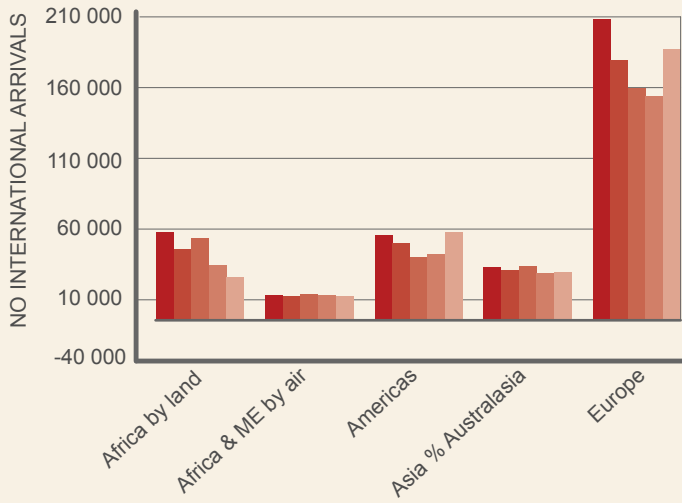
PROVINCIAL SHARE OF SA's TOURIST ARRIVALS



EASTERN CAPE INTERNATIONAL ARRIVALS 2014

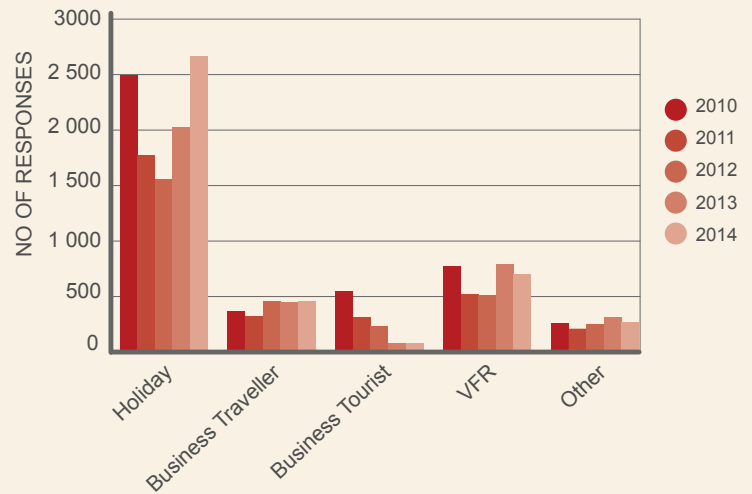


TOURIST ARRIVALS TO EASTERN CAPE BY SOURCE REGION



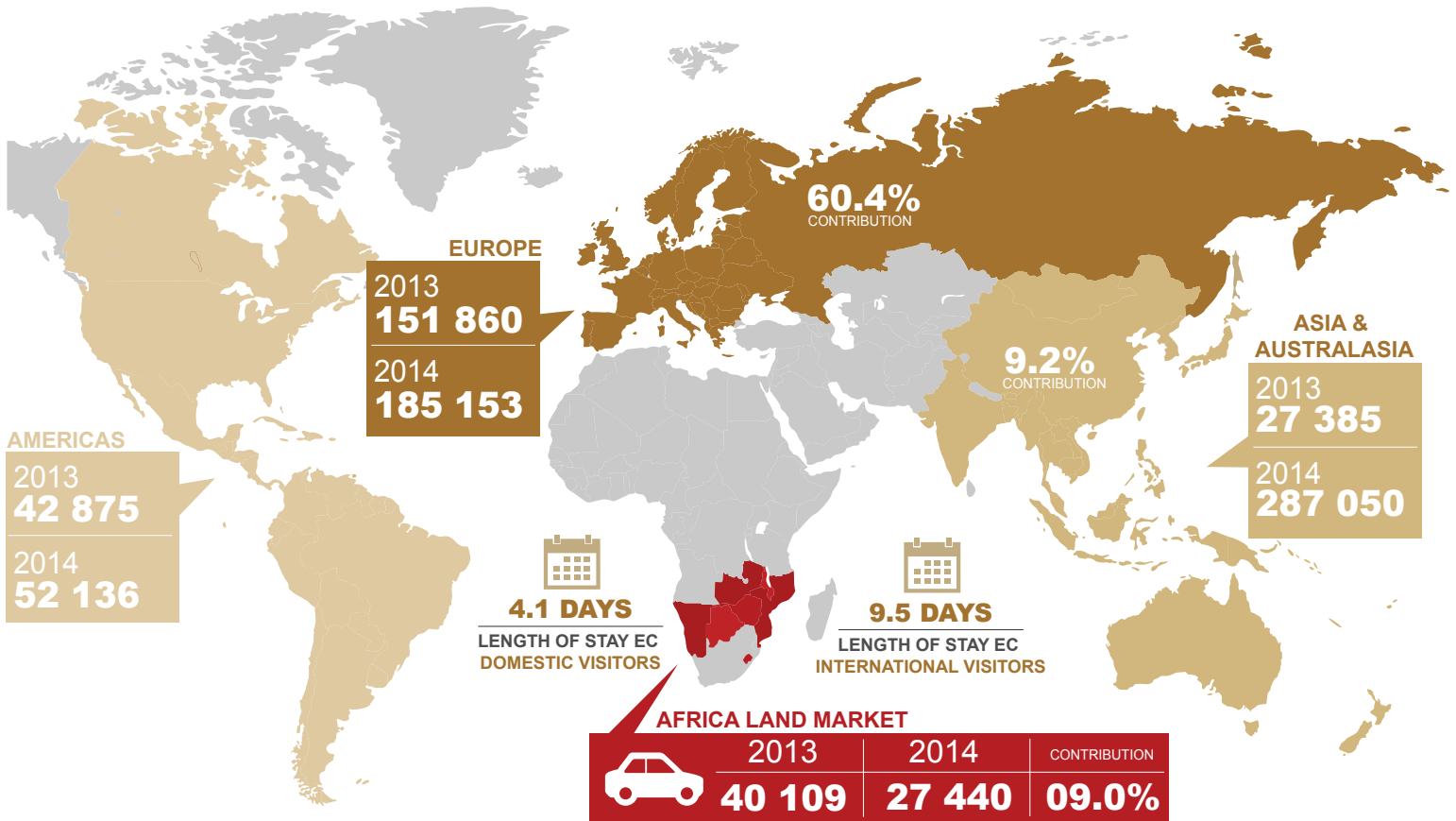
Source: SAT Annual Report 2010-2014

PURPOSE OF INTERNATIONAL VISITORS TO THE EASTERN CAPE



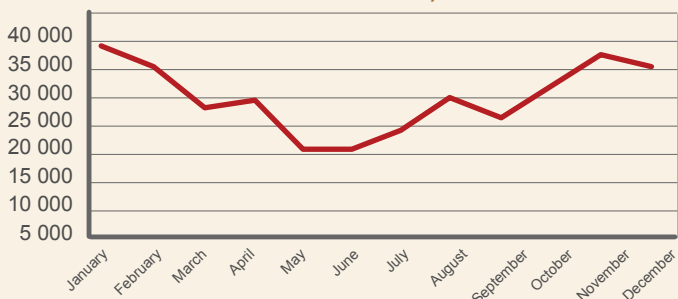
Source: SAT Annual Report 2010-2014

MAIN EASTERN CAPE SOURCE MARKETS



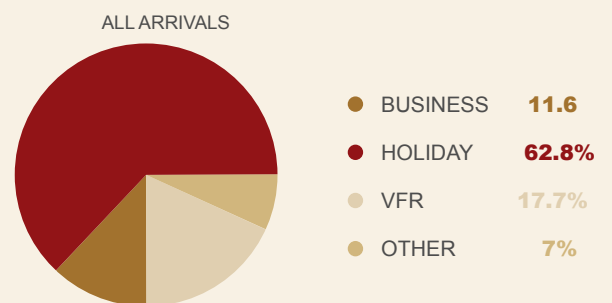
Source: SAT Annual Report 2010-2014

INTERNATIONAL TOURIST ARRIVALS BY MONTH TO EASTERN CAPE, 2014



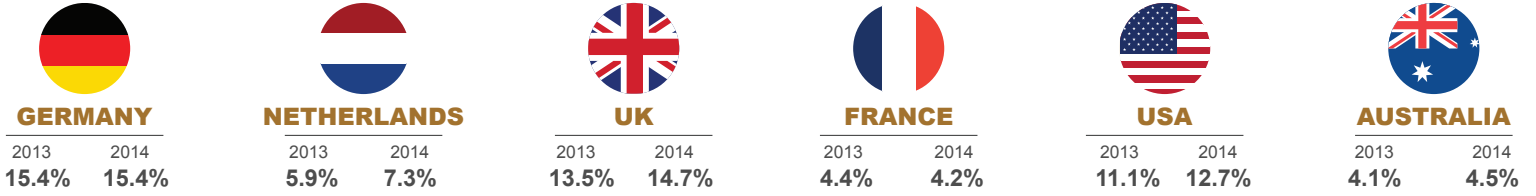
Source: SAT Annual Report 2014

PURPOSE OF VISIT INTERNATIONAL ARRIVALS, 2014



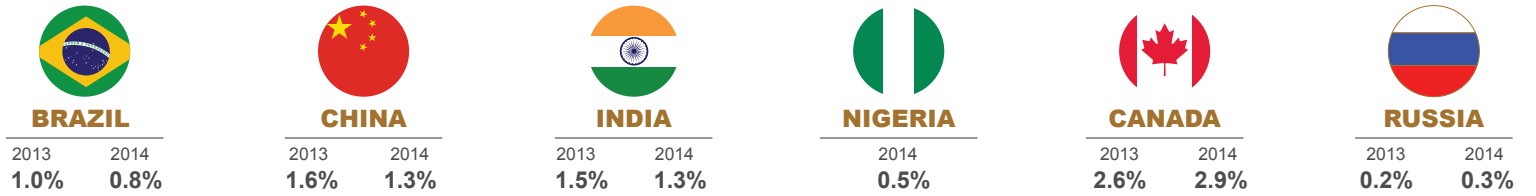
Source: SAT Annual Report 2014

PERCENTAGE OF TOTAL INTERNATIONAL TOURIST ARRIVALS TO EC BY MAIN AIR SOURCE MARKETS



Source: SAT Annual Report 2014

PERCENTAGE OF TOTAL INTERNATIONAL TOURIST ARRIVALS TO EC BY SA'S CORE & INVESTMENT SOURCE MARKETS



Source: SAT Annual Report 2014

DOMESTIC TOURISM

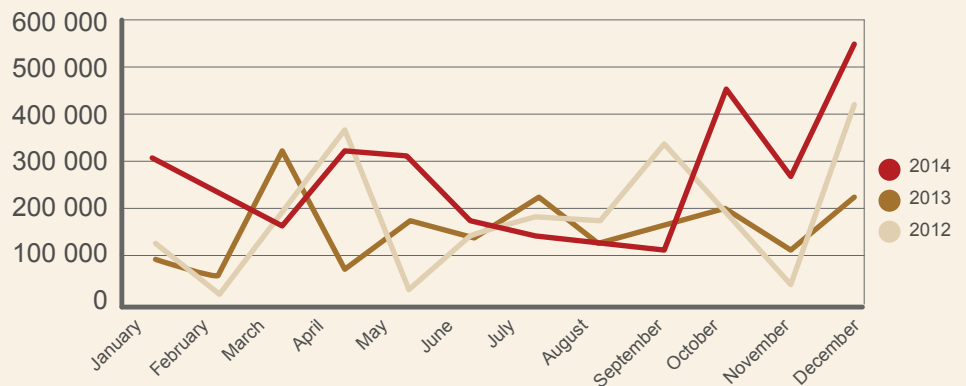
EASTERN CAPE DOMESTIC TOURISM PICTURE 2014



DOMESTIC TRIPS TO THE EASTERN CAPE

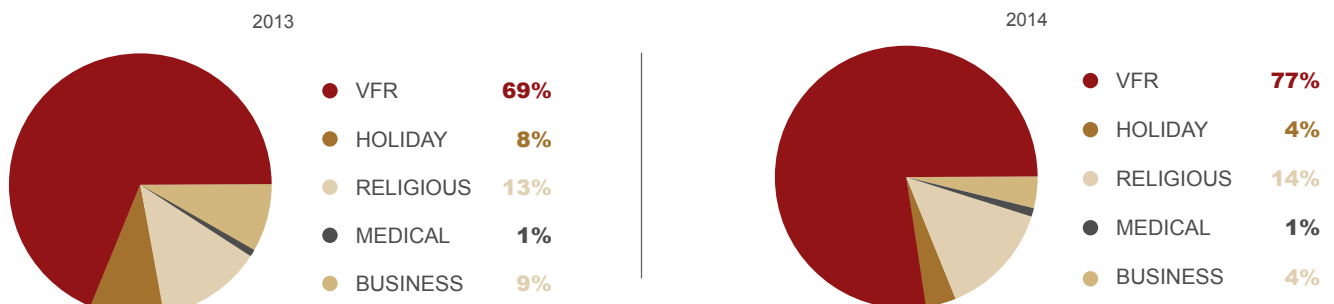
2014	3 224 000
2013	1 993 000
2012	2 314 000

EASTERN CAPE DOMESTIC ARRIVALS PER MONTH



Source: SAT Annual Report 2010-2014

EASTERN CAPE PURPOSE OF DOMESTIC TRIPS



Source: SAT Annual Report 2013-2014

BEDNIGHTS SOLD IN EASTERN CAPE, 2014



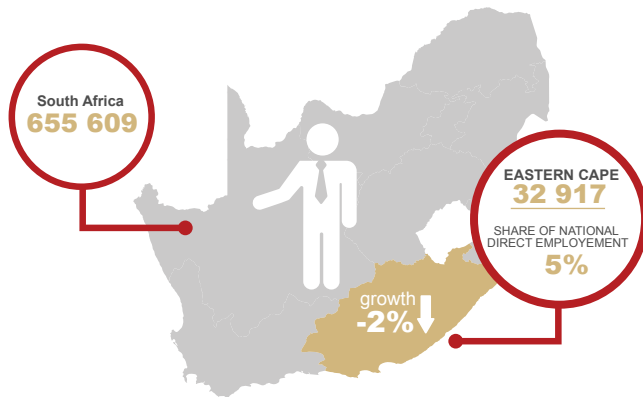
2.6 million (2013)
Growth 2013/2014 3.9%



11.6 million (2013)
Growth 2013/2014 13%

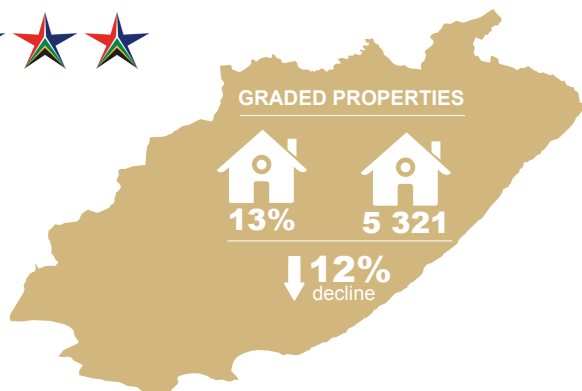
Source: SAT Annual Reports

TOTAL DIRECT EMPLOYMENT IN TOURISM, 2013



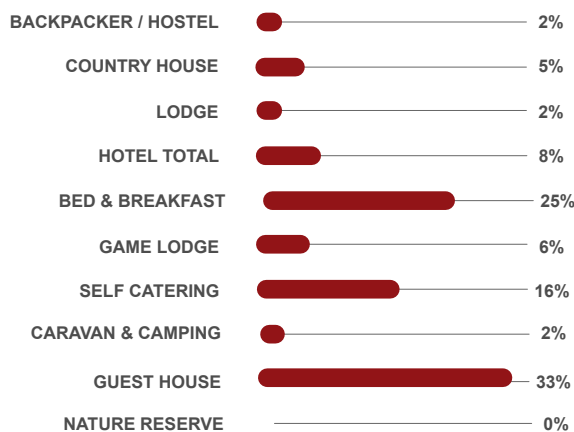
Source: EC figures based on estimation from national data: StatsSA, 2014

TOURISM PRODUCT SUPPLY



- 13% Of all graded properties nationally are located in the Eastern Cape
- 5 321 Graded properties are located in the Eastern Cape
- 12% Decline in numbers of graded properties between March 2013 and July 2015

EASTERN CAPE TGCSA GRADED PROPERTIES, JULY 2015



Source: TGCSA, 2015

EASTERN CAPE EVENTS AND ATTRACTIONS VISITOR NUMBERS

BAVIAANSKLOOF NATURE RESERVE THE EASTERN CAPE'S ONLY WORLD HERITAGE SITE

2014 / 2015	DAY VISITORS	OVERNIGHT	PERMITS SOLD
COCKSCOMB SECTION	5 257	3 181	4 418
WESTERN SECTION	4 293	0	3 610

Source: ECPTA for year ending March 2015

SANPARKS VISITOR NUMBERS

(2014 / 2015)	PARK VISITORS	ANNUAL GROWTH
ADDO ELEPHANT PARK	204 881	10.1%
CAMDEBOO NATIONAL PARK	37 326	15%
GARDEN ROUTE (INL WESTERN CAPE)	376 458	13.5%
MOUNTAIN ZEBRA	24 426	4.0%

Source: SANParks Annual Report 2014, 2013; for year ending March 2015

AIRPORT ARRIVALS, 2014



Throughput 658 363, 2013



Throughput 1 263 896, 2013

Source: ACSA data, 2015



2015	TOTAL GUESTS	PARTICIPANTS	% INTERNATIONAL PARTICIPATION	BED NIGHTS SOLD	DIRECT SPEND
IRONMAN SA HOSTED BY NMBM	7 641	2 041	30%	40 267	R52 347 258
IRONMAN 70.3 HOSTED BY BUFFALO CITY	10 965	2 929	5%	36 187	R47 043 100
EASTERN CAPE TOTAL	18 606	4 970	15%	76 454	R99 390 358



CHANGE 2014-2015	TOTAL GUESTS	PARTICIPANTS	% INTERNATIONAL PARTICIPATION	BED NIGHTS SOLD	DIRECT SPEND
IRONMAN SA HOSTED BY NMBM	-13.8%	-13.9%	17.3%	-13.8%	-13.8%
IRONMAN 70.3 HOSTED BY BUFFALO CITY	-4.3%	-1.6%	-4.1%	-4.3%	-4.3%
EASTERN CAPE TOTAL	-8.5%	-7.1%	12.7%	-9.6%	-9.6%

Source: World Endurance Africa Holdings, 2015

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