



Western Cape
Government

FOR YOU

Department of Economic Development and Tourism

Western Cape Tourism Strategy

Cruise Tourism – lessons for the Northern Cape

Ilse van Schalkwyk – Acting DDG

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Growth for Jobs (G4J) strategic framework



At its heart, the Growth for Jobs strategy – or simply G4J – is concerned with ensuring that **the Western Cape's growth trajectory breaks loose** from the historical trend of tracking national economy growth rates.

The strategy recognises that **the private sector creates jobs**, and that **the State needs to stimulate market growth and create an enabling environment** in which people and businesses are enabled to create and exploit opportunities.

Growth for Jobs (G4J) strategic framework: Vision & Goal



Our Vision

Break-out economic growth in order to drive sufficient employment and opportunity.

Our Goal

By **2035**, the Western Cape will be a **R1 trillion** inclusive economy, growing at between **4 and 6% per annum**, which will stimulate sufficient employment and opportunity to improve lives.



Growth for Jobs (G4J) strategic framework: Horizon 1 focus areas

Priority Focus Areas for Horizon 1 (up to 2026)



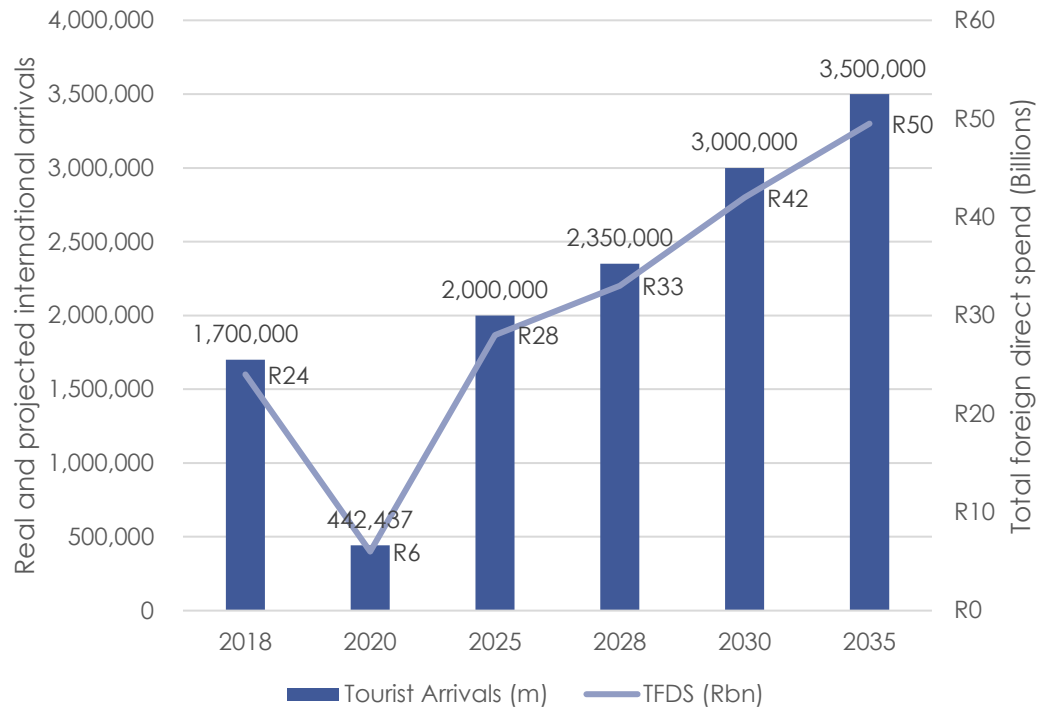
Growth for Jobs Strategy on tourism

“The Western Cape, with a strong domestic market capability, is a leading global export region in a diversified basket of goods and services and **a sought-after tourism destination** known for its quality, reliability and cost-effective goods and service offerings.” - G4J

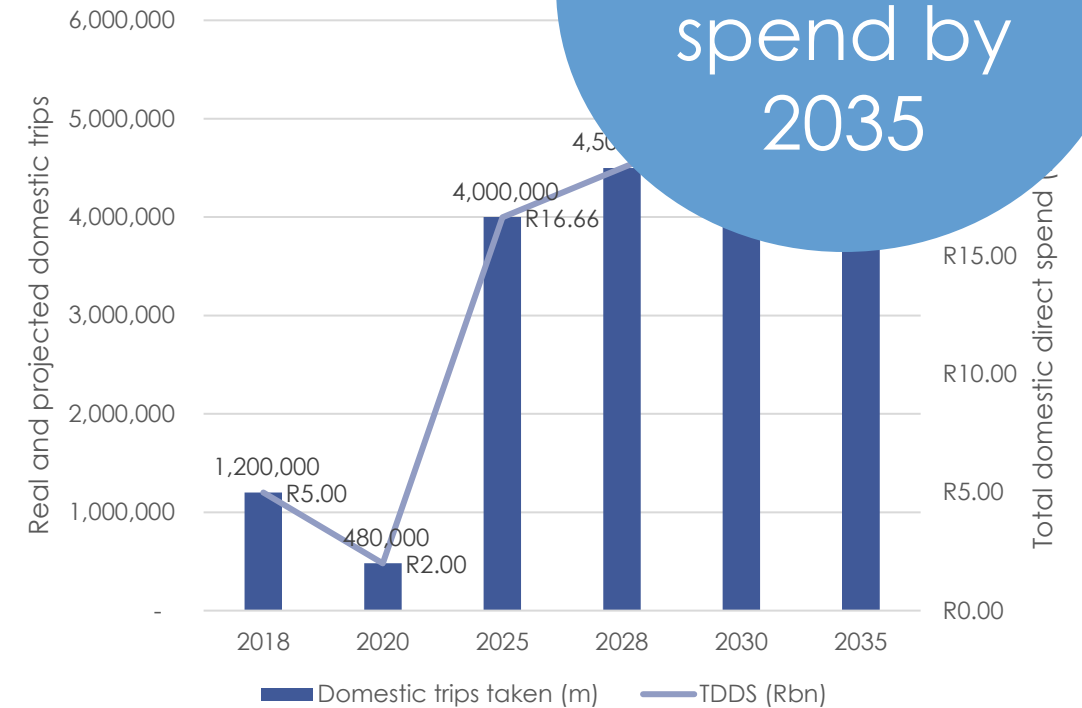
Although G4J is “sector agnostic” it does recognise that tourism plays a significant role in achieving one of the priority focus areas of G4J – achieving break-out export growth.

Western Cape tourism growth targets

Doubling
tourism
spend by
2035



International growth targets for the Western Cape



Domestic growth targets for the Western Cape

Holistic approach to destination management



Coordination & planning

Coordinating the private and public sector efforts and planning for human resource and structural capability to support the growth potential of the visitor economy.



Connectivity & dispersal

Improving physical and digital connectivity and encouraging regional dispersal of visitors throughout the districts.



Experience development

Delivering unique, engaging and quality experiences.



Infrastructure

Creating world class infrastructure to support the needs of our visitors.



Product development and a quality welcome

Expanding the product base and enhancing the quality and delivery of existing products and services.



Sustainability

Ensuring the tourism economy delivers sustainable and desirable economic, environmental and social outcomes to benefit the province.

Tourism Sector Strategy



Tourism Blueprint 2030

Overview of Tourism Blueprint 2030

How does Tourism Blueprint respond to the challenges and opportunities?



Purpose

To provide a roadmap for the region's long-term tourism vision, goals, objectives, policies and potential investment opportunities over the next 10 years.



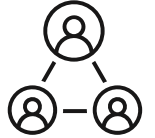
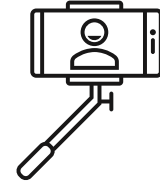
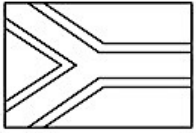
Vision

**Africa's leading destination
for leisure and business
travel.**



Tourism Blueprint 2030

Aims



1

Renew focus on **domestic markets**

2

Improve the **ease of doing business** for tourism businesses

3

Raise the **global profile** of Destination Western Cape

4

Identify and develop tourism **infrastructure**

5

Drive **geographic spread** of tourism benefits throughout the province

6

Grow **visitor numbers** and yield

7

Prioritise tourism **development growth and transformation** within each district across the province

8

Improve **customer experiences** (quality and service excellence)

9

Develop **industry partnership** programmes through action platforms

Tourism Blueprint 2030 challenges the industry to a radical new growth trajectory with ambitious targets that can only be achieved through collaborative action

Tourism Blueprint 2030's objective is to increase international arrivals to **3m** by 2030 with total foreign direct spend (TFDS) to reach **R42bn**.

Tourism Blueprint 2030 also aims to increase domestic trips taken to **5m** with a total domestic direct spend (TDDS) reaching **R20.83bn**.

Key strategic actions

The Western Cape will prioritise five components



TOURISM PRODUCT
DEVELOPMENT



DESTINATION
MARKETING



TOURISM
INFRASTRUCTURE



VISITOR SERVICES



INSTITUTIONAL
ARRANGEMENTS
AND PARTNERSHIPS

Destination
Development

Destination
Marketing

Destination
Management

Key strategic actions

while working to overcome barriers to travel...



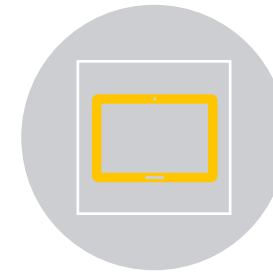
AIR ACCESS



VISA REGIME



SAFETY AND
SECURITY



DIGITAL
DISRUPTION

Strategic actions

Strategic actions to respond to challenges and opportunities



DECARBONISATION OF
TRAVEL



CLIMATE CHANGE
ADAPTATION AND
RESILIENCE



EMPHASIS ON
SUSTAINABLE, RESPONSIBLE
AND REGENERATIVE
TRAVEL



FOCUS ON WELLBEING
AND TRANSFORMATIONAL
TOURISM



TREND MONITORING AND
KNOWLEDGE SHARING

Section 6: Latent forms of tourism - Spotlight



CRUISE
TOURISM



HALAL
TOURISM



SPORT AND
EVENTS



6

Rationale

Why cruise, Halal and events?



Pre-Covid-19 cruise tourism was the fastest-growing sector in the tourism industry, with an annual growth of 7.4%.

As it stands, forward bookings for the 2022/23 Western Cape cruise season is already back at pre-pandemic levels.



There were an estimated 140 million Muslim international travellers in 2018; this is projected to grow to 230 million by 2026.

South Africa is regarded as a top Halal friendly travel destination and the Western Cape has a proud Muslim heritage.



Sport, events and tourism have a natural synergy and well-hosted events amplified by a clear tourism strategy can have a positive impact on the economy, the destination's image and the lives of the citizens of the Western Cape.

Key strategic actions and interventions

Exploiting latent forms of tourism through targeted strategies and programmes



CRUISE CAPE TOWN



HALAL TOURISM
PLAN

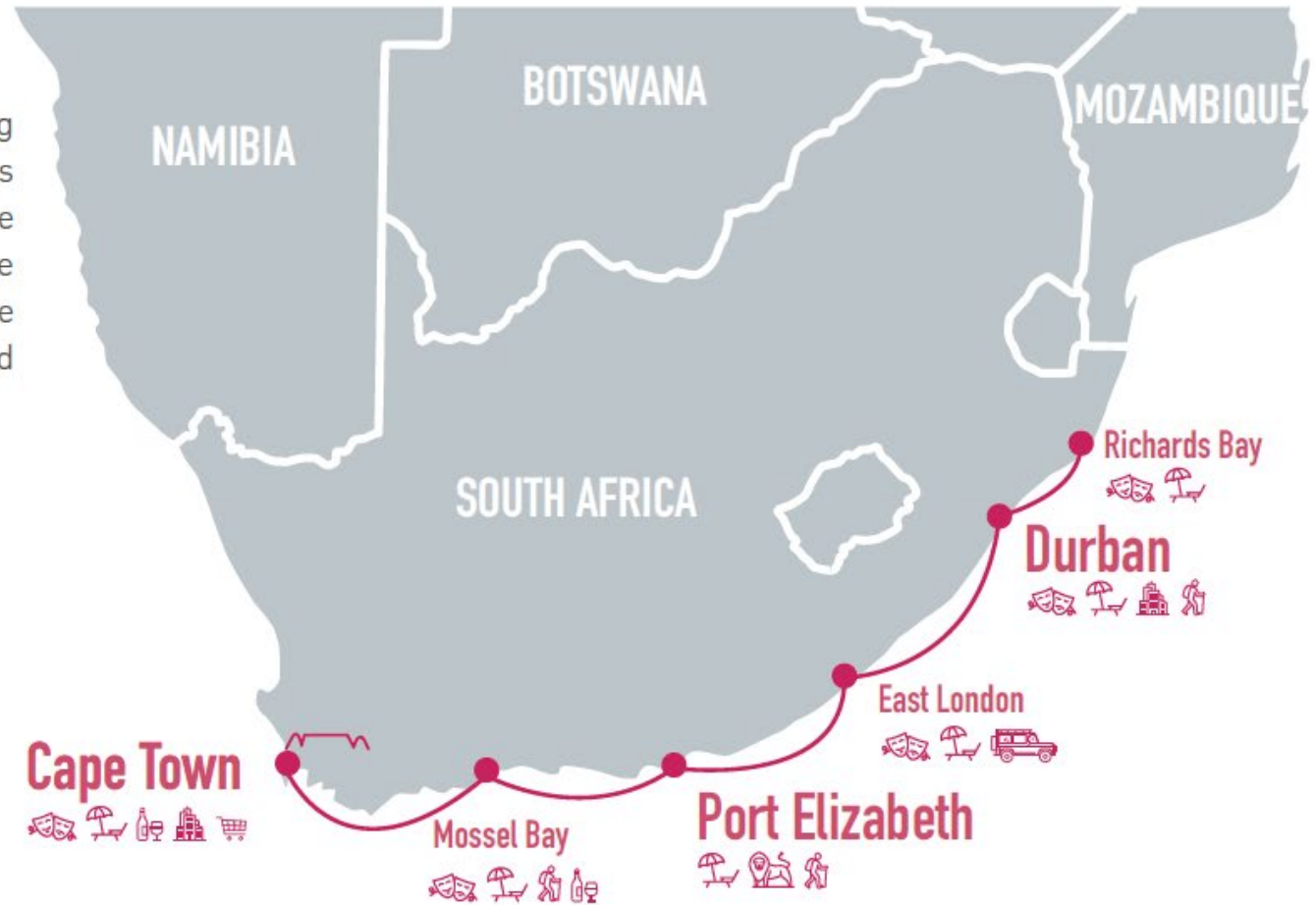


CAPE OF GREAT
EVENTS STRATEGY

Cruise Cape Town Port Map

The cruise industry is the fastest growing tourism sector in the world and has tremendous economic spin-offs for the country. In South Africa, Durban and Cape Town are positioned as home ports, while Mossel Bay Port Elizabeth, East London and Richards Bay are ports of call.

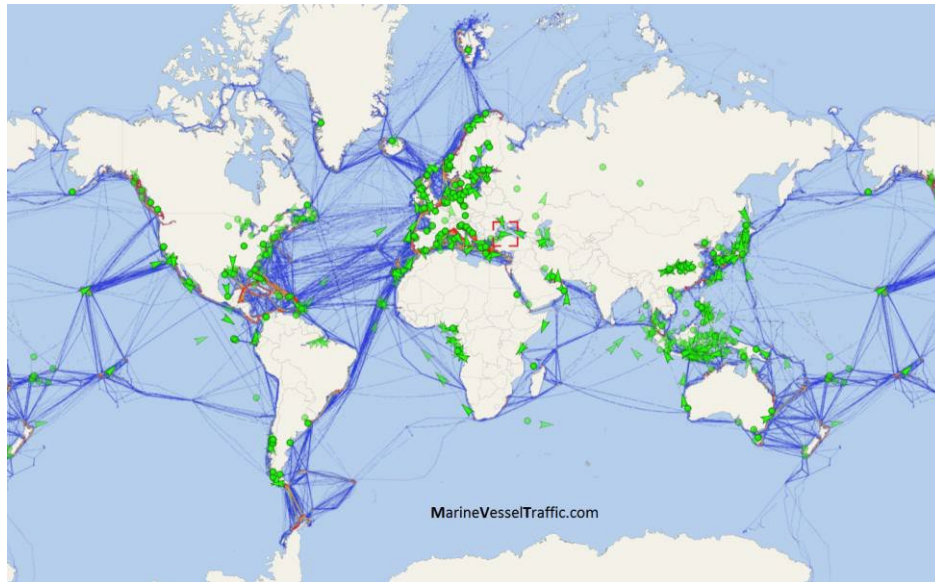
-  Culture & heritage
-  Beaches
-  Shopping
-  Food & wine
-  Metropolitan
-  Adventure
-  Safari
-  Game Drives



Importance of consistency in visitor experience along the SA coastline, planning for the Northern Cape link...

Impact & business case of cruise tourism

What are we solving?



Attracting more cruise liners to **Africa**

Why?

Every **30** cruise passengers visiting the destination generates **1 local job**. The latest economic impact study indicates that the cruise industry in 22/23 season in Cape Town contributed **R1.2 billion** to the **South African GDP**.

How?













Business Development and promotional activities (e.g. trade shows, sales visits)



Removing constraints and solving for flexibility

10 reasons why WC is driving cruise tourism

<p>1 Accessibility & market access: It is the 'turn-around' port for both inbound and outbound international arrivals and departures.</p> 	<p>2 Dedicated cruise terminal: Following a R59 million redevelopment, the Port of Cape Town now has a dedicated Cruise terminal at the V&A Waterfront.</p> 
<p>A food destination: Makers Landing, a food destination established by the V&A Waterfront to nurture small businesses & showcase local talent, is the arrival and departure point for Cruise Cape Town. The influx of foot traffic created by cruise visitors will positively impact the small businesses stationed at the landing.</p> 	<p>3 Three ship repair facilities: Cape Town Port boasts 3 ship repair facilities, one of which includes the largest dry dock in Southern Africa. The Port also provides comprehensive marine services: navigation, towage, pilotage, berthing, and pollution control.</p> 
<p>4 The Cruise Port of Mossel Bay: The Cruise Port of Mossel Bay, situated on the Garden Route halfway between Cape Town and Port Elizabeth, is the only South African port that operates two off-shore mooring points within port limits.</p> 	<p>5 Demand for cruising globally: Globally, demand for cruising reflected a 20.5% growth in the last five years.</p> 
<p>6 Younger generations embracing cruise travel: Younger generations, including Millennials and Generation Z, are embracing cruise travel, with two-thirds of Millennials saying that cruising is their favorite vacation.</p> 	<p>7 Catering to "remote workers": Combining work and leisure is a trend on the rise. "Digital Nomads" are opting for trips where they can work remotely, cutting down on time-off and lost income. Cruise liners are catering to this market with Wi-Fi, desks and work-friendly cafes to ensure that passengers can still do business, while enjoying a cruise vacation.</p> 
<p>8 Increase in bookings for 2021: Multiple reports have said that there has been an increase in bookings for 2021, despite uncertainty over when sailing will resume. According to a poll by CruiseCritic.com, 75% of people plan to book cruises at the same rate as before, once the COVID outbreak is contained.</p> 	<p>9 Economic significance: Vessels which docked at the Cape Town Cruise Terminal during the Nov 2018-April 2019 cruise season collectively contributed over R2 million in spend relating to ship crew members. The highest spend was linked to hotels, handling processing, transport and meals for crew members. The sector holds a strong economic significance for Cape Town and the Western Cape.</p> 

Objective & Governance

Special purpose vehicle – PMU within Wesgro

**CRUISE
CAPE TOWN**
marketed by **WESGRO**

01

The purpose of the Project is to increase the cruise economy in the Western Cape to improve the Western Cape's **competitiveness** in the cruise industry and to support tourism to stimulate economic growth and job creation in particular for the youth.

02

The 'Cruise Cape Town' project was initiated in line with the mandates of the City of Cape Town, WESGRO and DEDAT to ensure economic and tourism development in Cape Town and the Western Cape. A **brand** was developed.

03

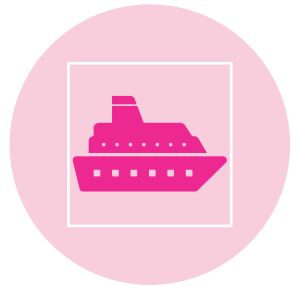
Relevant parties have recognized the need for a coordinated approach to rolling out the 'Cruise Cape Town' project and to this end have committed themselves to a **MoA** as a written embodiment of their commitment to the Project.

04

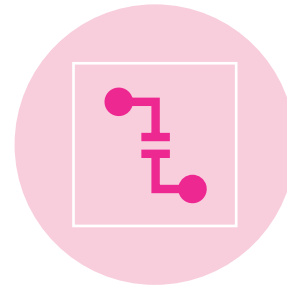
The parties have agreed that the Project will be undertaken under the auspices of Wesgro, with the assistance of the Project Team who will report every quarter to the **Steering Committee** comprising the parties. Private sector partners.

Cruise Cape Town Priorities

The Cruise Cape Town project has been broken up into four components, as follows:



1. Retention of cruise visits



2. Removing constraints



3. Solving for flexibility



4. Promote regional spread

WESGRO
cape town & western cape
tourism, trade & investment

 **Western Cape
Government**
FOR YOU
Economic Development
and Tourism


SAMSA
SOUTH AFRICAN
MARITIME SAFETY AUTHORITY

**CRUISE
CAPE TOWN**
powered by **WESGRO**




CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

TRANSNET


Closing comments

Reflection

- You need a well-functioning port/harbours – impact of upgraded V&A cruise terminal
- Collaborate with private & public sector
- The 2023/24 season was forecast to receive 48 ships, however, due to unrest in the Middle East and the Red Sea, the port of Cape Town received 67 ship visits, of which 30 were turnaround calls and 33 were in-transit calls. Global events impact us!
- Good governance structures – MOU needs to be in place between partners
- PMU capability is key – small team but dedicated capacity – Cruise Cape Town housed in Wesgro
- Data-led approach – annual impact assessment & survey
- Political buy-in
- Partnership with other Provinces, NDT & SAT

Thank You