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1. Environmental Analysis

1.1 Global Tourism

The travel & tourism (T&T) industry continues to contribute to the lives of millions of people by driving growth, creating jobs, reducing poverty and fostering development and tolerance. For the sixth consecutive year, industry growth outperforms that of the global economy, showcasing the industry’s resilience in the face of global geopolitical uncertainty and economic volatility. The T&T industry contributed US$7.6 trillion to the global economy (10.2% of global GDP) and generated 292 million jobs (1 in 10 jobs on the planet) in 2016. Research shows that for every 30 new tourists to a destination one new job is created; and already today, the travel and tourism industry has almost twice as many women employers as other sectors. Accounting for 30% of world services exports, and the largest export category in many developing countries, the industry is a tremendous employment generator. Yet research suggests that the industry’s potential could be hindered—and 14 million jobs could be at risk—if governments and the private sector do not address (amongst other things), crime affecting tourists. If properly managed, the T&T sector can continue to be a contributor to inclusive growth, given the relatively low barriers required to provide services and start a business related to tourism.

“There is no doubt that tourism generates almost more jobs than manufacturing. Very, very few of us appreciate the hardcore significance of this. The real potential of the industry, however, remains largely untapped.”

(Source: Iraj Abedian, CEO of Pan-African Capital Holdings, commenting after SAT research presentation, November 2007)

Global Tourism Trends reveal an increase in international tourist arrivals. In addition, Africa is showing an increase in international tourist arrivals compared to the prior year.
1.2 National Tourism

Foreign tourist arrivals reached 10.3 million in 2017 and accounted for 37% of total tourism trips to South Africa. The foreign market to South Africa increased by 2.4% when compared to 2016, driven by positive growth across all regions. The statistics depicted below reveals the importance of the tourism industry’s contribution to South Africa’s economy.

<table>
<thead>
<tr>
<th>International Tourism Indicators</th>
<th>2016</th>
<th>2017</th>
<th>16/17 y-o-y % change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of tourist arrivals</td>
<td>10.0 million</td>
<td>10.3 million</td>
<td>2.4%</td>
</tr>
<tr>
<td>Total foreign direct spend (excl capital expenditure) from tourists</td>
<td>R75.5 billion</td>
<td>R80.7 billion</td>
<td>6.9%</td>
</tr>
<tr>
<td>Total number of bed nights spent by tourists</td>
<td>88.8 million</td>
<td>120.6 million</td>
<td>35.7%</td>
</tr>
<tr>
<td>Average spend in South Africa per foreign tourist</td>
<td>R8,100</td>
<td>R8,400</td>
<td>-</td>
</tr>
<tr>
<td>Average length of stay of tourists visiting South Africa</td>
<td>9.2 nights</td>
<td>12.2 nights</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: SA Tourism, 2018
Speaking during his first State of the Nation address in Parliament in February 2018, South Africa’s newly-elected President Cyril Ramaphosa affirmed his belief that South Africa is a major role player when it comes to global tourism. Ramaphosa is convinced the country is able to more than double the “700 000 people currently employed in the tourism sector”. The sector not only provides an outlet for rapid job creation in the country without much bricks and mortar required, but it already outperforms other growth sectors contributing to South Africa’s economy. The Tourism Industry has accordingly been prioritised as a national priority.¹

1.3 Western Cape Tourism

Tourism has been a significant contributor to both the Western Cape economy and in creating jobs within the Western Cape. The Western Cape’s tourism sector continues to outperform the rest of South Africa. According to SA Tourism, the province had the second highest number of ‘paid bed nights’, which rose to 23.3 million in 2018. The average length of stay per tourist in the Western Cape (12.9 nights per tourist) was the highest amongst all provinces. International arrivals in the Western Cape increased by 0.2% to reach 1.7 million arrivals in 2018. Due to this, foreign spend increased to R27.7 billion in 2018. Estimated GVA rose by 3.5% in 2018.

Of all nine provinces, in 2017 the Western Cape ranked:

- TOP in the number of paid bed nights: 15.2 million
- TOP in the average length of stay: 14.1 nights
- TOP in the share of “First Timer” travelers: 56.7%
- TOP province for “Holiday”: 55.8%
- TOP in the highest average spend: R14,400
- 2nd Highest in Total Foreign Direct Spend: R23.1 billion
- 2nd Highest in total bed nights: 23.3 million
- 3rd Highest in tourist arrivals: 1.7 million

Source: SA Tourism, 2018
The figure below depicts the top 20 attractions visited by tourists in South Africa.

<table>
<thead>
<tr>
<th>LANDMARK</th>
<th>2016</th>
<th>2017</th>
<th>16/17 % change</th>
</tr>
</thead>
<tbody>
<tr>
<td>V&amp;A Waterfront</td>
<td>1101000</td>
<td>1162000</td>
<td>5.5%</td>
</tr>
<tr>
<td>Cape Town Central City</td>
<td>1088000</td>
<td>1080000</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Cape Point</td>
<td>862000</td>
<td>943000</td>
<td>9.4%</td>
</tr>
<tr>
<td>Table Mountain Aerial Cableway</td>
<td>786000</td>
<td>799000</td>
<td>1.7%</td>
</tr>
<tr>
<td>Camp’s Bay</td>
<td>511000</td>
<td>779000</td>
<td>52.4%</td>
</tr>
<tr>
<td>The Winelands</td>
<td>669000</td>
<td>730000</td>
<td>9.1%</td>
</tr>
<tr>
<td>Sandton City</td>
<td>818000</td>
<td>688000</td>
<td>-15.9%</td>
</tr>
<tr>
<td>Table Mountain (Excluding Cableway)</td>
<td>352000</td>
<td>494000</td>
<td>40.3%</td>
</tr>
<tr>
<td>Kirstenbosch National Botanical Gardens</td>
<td>447000</td>
<td>490000</td>
<td>9.6%</td>
</tr>
<tr>
<td>The Garden Route</td>
<td>402000</td>
<td>478000</td>
<td>18.9%</td>
</tr>
<tr>
<td>Clifton Beach</td>
<td>374000</td>
<td>418000</td>
<td>11.8%</td>
</tr>
<tr>
<td>Kruger Park</td>
<td>294000</td>
<td>391000</td>
<td>33.0%</td>
</tr>
<tr>
<td>Robben Island</td>
<td>337000</td>
<td>331000</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Apartheid Museum</td>
<td>262000</td>
<td>301000</td>
<td>14.9%</td>
</tr>
<tr>
<td>Tsitsikamma National Park</td>
<td>250000</td>
<td>296000</td>
<td>18.4%</td>
</tr>
<tr>
<td>Mandela House (Soweto)</td>
<td>227000</td>
<td>234000</td>
<td>3.1%</td>
</tr>
<tr>
<td>Eastgate Mall</td>
<td>233000</td>
<td>219000</td>
<td>-6.0%</td>
</tr>
<tr>
<td>Tour of Soweto</td>
<td>212000</td>
<td>217000</td>
<td>2.4%</td>
</tr>
<tr>
<td>Addo Elephant Park</td>
<td>170000</td>
<td>217000</td>
<td>27.6%</td>
</tr>
<tr>
<td>Blyde River Canyon</td>
<td>161000</td>
<td>194000</td>
<td>20.5%</td>
</tr>
</tbody>
</table>

Source: SA Tourism, 2018

The 2017 tourism statistics (SA Tourism, 2018) reveal that:

- 12 out of the TOP 20 attractions and landmarks visited in South Africa were based in the Western Cape
- 13 out of the TOP 25 natural scenery and game attractions visited in South Africa were based in the Western Cape
- The V&A Waterfront ranked as the TOP mall in the TOP 20 malls and urban attractions visited in South Africa
- Robben Island ranked as the TOP landmark in the TOP 10 culture and heritage attractions visited in South Africa
• Camp’s Bay and Clifton ranked as the TOP two beaches in the TOP 10 beach front attractions visited in South Africa, followed by Mossel Bay in 10th position.

Adventure ranked as the top activity enjoyed by tourists to the Western Cape, followed by natural attractions, beaches, wildlife and theme parks. While Cape Town maintains its standing as Africa’s top city for business, the Western Cape continues to hold a strong demand from the leisure market.

![Graph of TOP ACTIVITIES ENJOYED IN THE WESTERN CAPE, 2017](image)

*Source: SA Tourism, 2018*

Whilst Tourism is a significant contributor to the Western Cape (and indeed South Africa as a whole)’s economy, the impact of crime on tourists threatens to negatively affect this sector. In recent years Cape Town and the broader Western Cape region has gained an international reputation for high levels of crime and social instability. Crime, violence and social unrest remain the most immediate and challenging threat confronting the Western Cape’s aspiration to become a globally competitive tourist destination.

As Western Cape tourism faces the realities of emerging markets and global demand trends, it is of utmost importance that visitors feel safe and protected.
In the recently released 2018 crime stats by South African Police Service and Stats SA, it can be noted that the national murder rates increased during the year quite significantly, shooting up 7% to over 20,000 cases recorded in 2017/18. This gives South Africa rather alarming 57 murders a day and at a rate of 35.7 people murdered per 100,000 population. Shockingly, the number of reported rapes in South Africa has also increased to 40,035 cases in the year. High levels of murder and rape statistics is particularly damaging to the Western Cape’s perceived image as an attractive tourist destination. Such high levels of murder and rape discourages tourists from travelling to South Africa and thus the Western Cape.

2. Problem Analysis

An analysis of crime trends in the top 12 tourist attractions in the Western Cape reflects an increasing trend as evidenced in the table below.

<table>
<thead>
<tr>
<th>CRIME TRENDS AT WESTERN CAPES 12 MOST VISITED ATTRACTIONS OR LANDMARKS</th>
<th>16/17 % change</th>
<th>Crime incidents % change</th>
<th>SAPS Stations</th>
</tr>
</thead>
<tbody>
<tr>
<td>V&amp;A Waterfront</td>
<td>5,5%</td>
<td>3,6%</td>
<td>Table Bay Harbour SAPS Station</td>
</tr>
<tr>
<td>Cape Town Central City</td>
<td>-0,7%</td>
<td>8,1%</td>
<td>Cape Town Central SAPS</td>
</tr>
<tr>
<td>Cape Point</td>
<td>9,4%</td>
<td>-0,6%</td>
<td>Simonstown and Fish Hoek SAPS Stations</td>
</tr>
<tr>
<td>Table Mountain Aerial Cableway</td>
<td>1,7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Camp’s Bay</td>
<td>52,4%</td>
<td>37,9%</td>
<td>Camps Bay SAPS Station</td>
</tr>
<tr>
<td>The Winelands</td>
<td>9,1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Table Mountain (Excluding Cableway)</td>
<td>40,3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kirstenbosch National Botanical Gardens</td>
<td>9,6%</td>
<td>-6,0%</td>
<td>Wynberg and Claremont SAPS Stations</td>
</tr>
<tr>
<td>The Garden Route</td>
<td>18,9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clifton Beach</td>
<td>11,8%</td>
<td>37,9%</td>
<td>Camps Bay SAPS Station</td>
</tr>
<tr>
<td>Robben Island</td>
<td>-1,8%</td>
<td>3,6%</td>
<td>Table Bay Harbour SAPS Station</td>
</tr>
<tr>
<td>Tsitsikamma National Park</td>
<td>18,4%</td>
<td>26,5%</td>
<td>Storms River SAPS Station</td>
</tr>
</tbody>
</table>

It must be noted that tourists are more vulnerable to crime than citizens. Although theft is the most common crime against tourists, they are vulnerable to other crimes as well, including physical and sexual assault, credit card fraud, and scams. In areas with many adult entertainment venues, tourists tend to congregate and be disproportionately targeted by offenders. Crimes against tourists tend to occur in areas with higher overall crime rates. Tourists may unwittingly contribute to the problem through excesses and dangerous practices in sport and leisure activities, driving, gaming, and drinking. They may also contribute to their victimization by carrying and flashing large sums of money; visiting dangerous locations or walking in isolated areas or dark alleys; leaving valuable items in public view and simply looking like a tourist.
Tourists cluster in particular locations. Hotels, motels, downtown centers, shopping malls, bars, restaurants, tourist attractions, beaches, and airports are all potential points of encounter for victims and offenders. Venues such as bars and nightclubs can encourage heavy drinking and a sense of freedom from normal constraints. Because tourists often are obvious by their dress, carry items easily disposed of once stolen, and are temporary visitors (and thus unable to put much pressure on police to act against criminals, or unlikely to appear as a prosecution witness), tourist zones allow pickpockets, swindlers, thieves, gang members, and robbers to commit crimes they might not otherwise attempt or be able to accomplish.

Crime against tourists can impede tourism by significantly damaging a location’s image. Therefore, the most important prerequisite for a successful tourist industry is a reputation for having crime under control and communicating tourism safety.

The 2017 edition of the World Economic Forum Travel & Tourism Competitiveness Report features the latest iteration of the Travel & Tourism Competitiveness Index (TTCI) and defines its framework as follows:

**The T&T Competitiveness Index 2017 framework**

![Diagram of Travel & Tourism Competitiveness Index]

The TTCI Index shows that South Africa lost 5 places in the 2017 rankings compared to 2015.

South Africa’s tourism competitiveness has deteriorated on two elements—safety and security (down to 120th out of 136 countries) and environmental sustainability (down to 117th). Fears of terrorism and an increased sense of insecurity related to crime make tourists less light-hearted about
travelling in the country. With 35.7 homicides per 100,000 people, South Africa has one of the worst homicide rates in the index, ranking 131st out of 136 countries.

Another aspect that has contributed to a lower performance for South Africa this year is the reduced efforts made by the government to support the sector (down to 59th).

The negative perception of crime and lack of safety for tourists has caught the attention of international media, as depicted by the following recent international news report headlines:

**Tourism Safety**

When one tries to define Tourism Safety one realises that there is no definition written down whereby one can grasp the scope of Tourism Safety.

What is clearly stated is that “safety and security are vital to providing quality in tourism. More than any other economic activity, the success or failure of a tourism destination depends on being able to provide a safe and secure environment for visitors”.

- “Tourist Safety and Security: Practical Measures for Destinations” by UNWTO

The factors contributing to the high levels of crime against tourists in the Western Cape and low levels of safety preparedness pertaining to tourist’s safety are:
1. Crime affecting tourists is often neglected by SAPS as they focus on high priority incidents such as unrests, gang warfare etc. Common instances of crime affecting tourists such as theft, muggings, fraud etc. are not a top priority for SAPS and other law enforcement agencies.

2. Lack in centralised emergency and preparedness hotline similar to the USA’s 911 leads to delayed response time during emergencies. Western Cape does not have a central hotline that locals and tourists can call in times of emergency. Different numbers for SAPS, fire brigade, ambulance etc. exist.

3. Lack in coordinated support to visitors in distress. There is a fragmented approach and lack in clarity regarding which entity should be dealing with what kind of emergency.

4. Lack of coordinated and shared approach by stakeholders in relation to safety within the tourism value chain.

5. Lack of collaboration between government and private sector (including foreign embassies). No central meeting point exists between authorities (government, law enforcement), foreign consulates, embassies and private sector stakeholders e.g. tour operators, banks, hotel groups, B&Bs etc. where intelligence can be shared, trends observed, and alerts can be issued.

6. Lack in a communication protocol or strategy resulting in too few good news stories going out from the Western Cape. There is no joint government & private sector communication strategy related to tourist’s safety that can be initiated.

7. High levels of inequality and unemployment in South Africa makes tourists a "soft target". Local communities do not see themselves as stakeholders in the broader tourism ecosystem.

8. Lack in access to government for technology solution providers to present latest safety enabling technological offerings.

9. Significant lack of data pertaining to incidents affecting tourists leading to a gap in meaningful data intelligence.

10. No platform exists where government can engage with local communities to raise awareness around tourism related concerns and develop strategic partnerships that is mutually beneficial to government, the local communities and tourists.

11.
3. Tourism Safety Strategy

Tourism significantly contributes to the Western Cape economy both in terms of GVA and job creation and as such addressing the factors affecting tourism safety needs to be championed by DEDAT. National Department of Tourism has made tourism and tourism safety a priority thus providing DEDAT the perfect fertile ground to play a leadership role by bringing in safety & security, social development, and environmental issues all under the umbrella of Tourism Safety.

The White Paper on the Development and Promotion of Tourism in South Africa (1996) stipulates that “Tourism is Government led, Private Sector driven, and Community based”. Keeping to this pronouncement a Tourism Safety strategy has been developed to address the fundamental risks from a safety perspective affecting tourists visiting the Western Cape by seeking to build partnerships with private organisations and leveraging off untapped potential in local communities affected by social ills and crime thereby uplifting them.

Having a dedicated Tourism Safety strategy has the advantage of this niche part of the Western Cape’s economy getting the priority and focused attention it deserves.

The objectives of the Tourism Safety strategy are:

1. Reduction in crime affecting tourists within the Western Cape
2. Improvement in the brand image of Cape Town and the Western Cape from a safety/security/crime perspective
3. Development of a multi stakeholder and collaborative working solution which brings public sector and private players together
4. Building a sense of confidence in role of government to make a difference on key issues affecting our economy and society
5. Creating a best practice model for crime reduction which could be implemented elsewhere to reduce crime for all South Africans
6. Improvement in the level of safety and security readiness and preparedness within the tourism industry – attractions and tourism businesses (such as tour operators, venues, guides)
The six-lever Tourism Safety strategy is depicted in figure below:

3.1 Lever 1 - Tourism Safety Forum

A proactive response to tourist crime prevention is imperative in order to protect tourists, and positively impact the Western Cape economy at large.

A formally structured, multi-stakeholder and collaborative safety forum will be formed where all stakeholders in the tourism safety ecosystem will be represented. Further sub-forums addressing specific risks will be formed.

3.2 Lever 2 - Enforcement Task Force

A multi-stakeholder enforcement task team is to be established which is:

- Professionally managed 24/7
- Formally endorsed by SAPS
- Partnership with Neighbourhood Watches and other community policing initiatives
- Partnering with National Prosecuting Authority to enforce prosecution

Operational models are to be replicated to address specific risk areas such as Table Mountain or CBD.

3.3 Lever 3 Tourist Safety Response
Assisting and supporting a tourist in distress leaves a positive impression on the tourist and has the potential of eradicating any negative impact they have experienced.

DEDAT’s Tourism Safety and Support Programme (TSSP) provides assistance to tourists in distress.

Objectives of TSSP are:

- Practical and emotional support for tourists in need.
- 24-hour response capability, 7-days a week.
- Facilitation and liaison with all key role-players and tourism stakeholders.
- Awareness and lobbying.
- Intervention or representation at different levels

This lever’s mandate includes assessing and developing the safety and security preparedness of all tourist attractions within the Western Cape.

In addition, synergistic partnerships with consulates and embassies are being developed.

### 3.4 Lever 4 - Tourist Safety and Security Tech

This lever’s mandate is to identify innovative technologies that can act as an enabler to help address and solve core tourist safety risks and match the solution providers to the custodians of the law enforcement initiatives.

### 3.5 Lever 5 - Tourism Safety Communication

A comprehensive communication strategy is to be developed integrating all important stakeholders – government, businesses, tourism associations, industries and communities across the tourism value chain.

The Communication objectives are:

- Build awareness of Tourism Safety among all stakeholders
- Secure the commitment and buy-in from all stakeholders.
- Influence specific policies or policymakers around key aspects of Tourism Safety for Cape Town and the Western Cape as a Tourism Destination.
- Encourage participation among researchers or partner bodies.
- Assess the brand image of Western Cape as a tourist destination by developing a tool to measure the perception of safety and security affecting tourists and monitoring it periodically.

### 3.6 Lever 6 - Tourism Safety Interventions and Partnerships
Synergies to enable funding of cross-platform initiatives and skills developments are to be identified.

This lever further includes collaboration with and leveraging National Department of Tourism’s support for the Tourism Safety Monitors Programme.

3.7 Pillar underpinning the Levers: Effective Data Tracking & Measurement System

A data intelligence hub shall be established to gather data on all tourist safety incidents and encourage accurate reporting.

4. Strategic Fit to Provincial Strategic Plan (PSP)

The Vision Inspired Priority (VIP 1) of the Provincial Strategic Plan (PSP) captures the Provincial target of 350,000 jobs over the next five years. Three apex goals that are supported and driven by the Department of Economic Development and Tourism were identified to realise the impact of increasing employment in the Western Cape Economy. The three apex goals are:

- Grow exports by 50%
- 80% placements of Chrysalis graduates
- Establish tourism safety task force in order improve perceptions of tourism safety by 25%

Safety Aligned Apex Priority

Tourism is a major part of the Western Cape economy and employs more than 200,000 residents and therefore we need to ensure that we maintain the Western Cape and Cape Town’s reputation as a
sought after, quality destination. As DEDAT, it is important to manage the negative perceptions around safety of the destination and create a positive and caring atmosphere for tourists in distress. DEDAT has a dedicated Tourism Safety and Support Unit which provides both pro-active and re-active responses to tourists in distress. It has now gone a step further by developing a Tourism Safety Strategy to address the fundamental safety related risks affecting tourists visiting the Western Cape. This is done by building partnerships with private organisations and leveraging off the untapped potential in local communities affected by social ills and crime thereby uplifting these communities at the same time.

Aligned to the VIP 1 of creating 350 000 jobs are safety apex priorities, which are particularly important if the Province wants to grow the tourism sector. Crime against tourists in the CBD and in the Table Mountain precinct specifically has severely impacted tourism growth because of the growing perception that the Western Cape is not a safe tourism destination.

Furthermore, there are not many opportunities to modify the behaviour of at-risk youth and provide them with the skills required to be absorbed into the labour market. Chrysalis is an academy funded by the Department of Community and Safety that intervenes in the lives of a cohort of at-risk youth that have a matric or below level of education. The organisation works to develop these youths and pivot them onto a path that will allow them to be productive members of society.

The aims of the department’s two safety aligned priorities are to (i) abate crime against tourists and arrest the growing negative perception that the region is an unsafe tourism destination, and (ii) improve the uptake of at-risk youth into further education and/or employment opportunities.

**Improve tourism safety**

The department aims to improve overall tourism safety by the establishment and operationalization of a tourism safety taskforce to improve tourism safety and undertake measures to address the perception of safety risks in the CBD and in the Table Mountain precinct.