

Western Cape Tourism Recovery: November 2021

Twenty months into the COVID-19 pandemic, the tourism industry continues to feel its impact. As vaccine rollouts gain traction and travel restrictions continue to ease, this report aims to measure tourism recovery in the Western Cape over the period November 2020 to October 2021, by comparing it to the 2019 tourism figures.

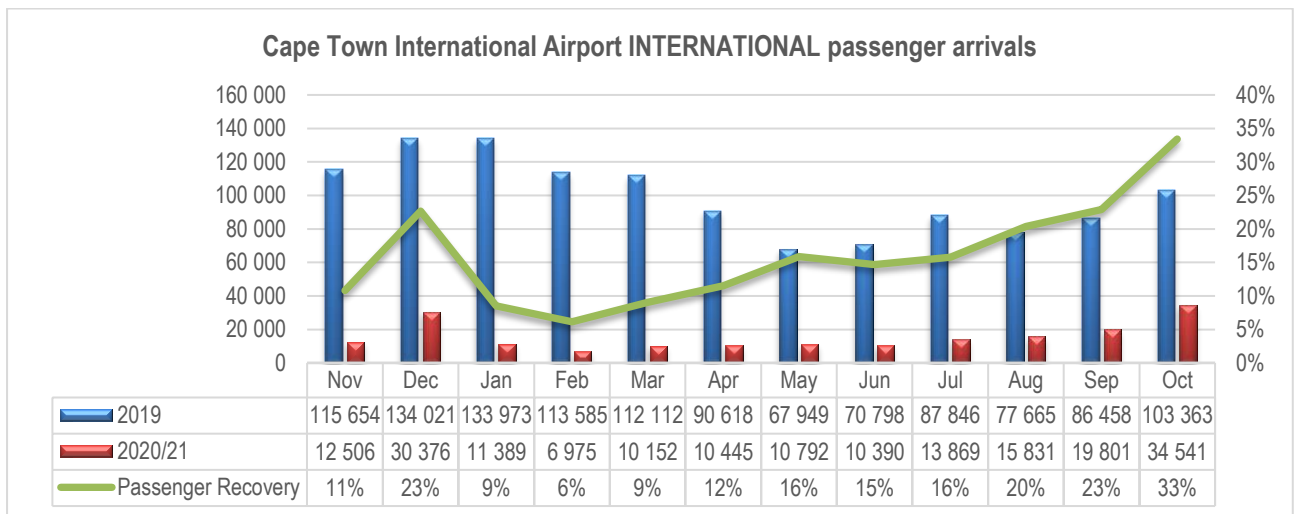
1. Cape Town International Airport (CTIA) Passenger Movement

- Passenger arrivals through Cape Town International Airport domestic terminal were highest in October 2021 with 236 076 passengers, representing a 65% recovery rate when compared to the same period in 2019. Recovery slowed down in June and continued declining in July as the third wave of COVID-19 infections hit the country but recovered, doubling in August and continuing on an upward trajectory in September and October.
- George Airport saw 29 129 domestic arrivals in October with a recovery rate of 81% when compared to the same month in 2019.



Source: Airports Company South Africa, 2021

- International recovery has been slower, reaching its peak in October 2021 with a 33% recovery rate after an influx of arrivals last seen in December 2020.
- Germany has remained one of the province's top international source markets, while other European markets have declined significantly. The UK and Germany saw sharp declines in February and remained low until August likely due to travel bans. In September, however, Germany and the UK ranked 4th and 7th in terms of arrivals from international markets.
- African markets like Namibia, Zimbabwe, Angola, Kenya, Ethiopia, Nigeria and Botswana have recovered more steadily, although the numbers are smaller. Visitor arrivals from Ethiopia, in particular, exceeded their Jan - Sep figure by more than 50% over the same period in 2019.
- Arrivals from the USA had a slow start to 2021 but rose significantly since June and became the top international market through CTIA in September.

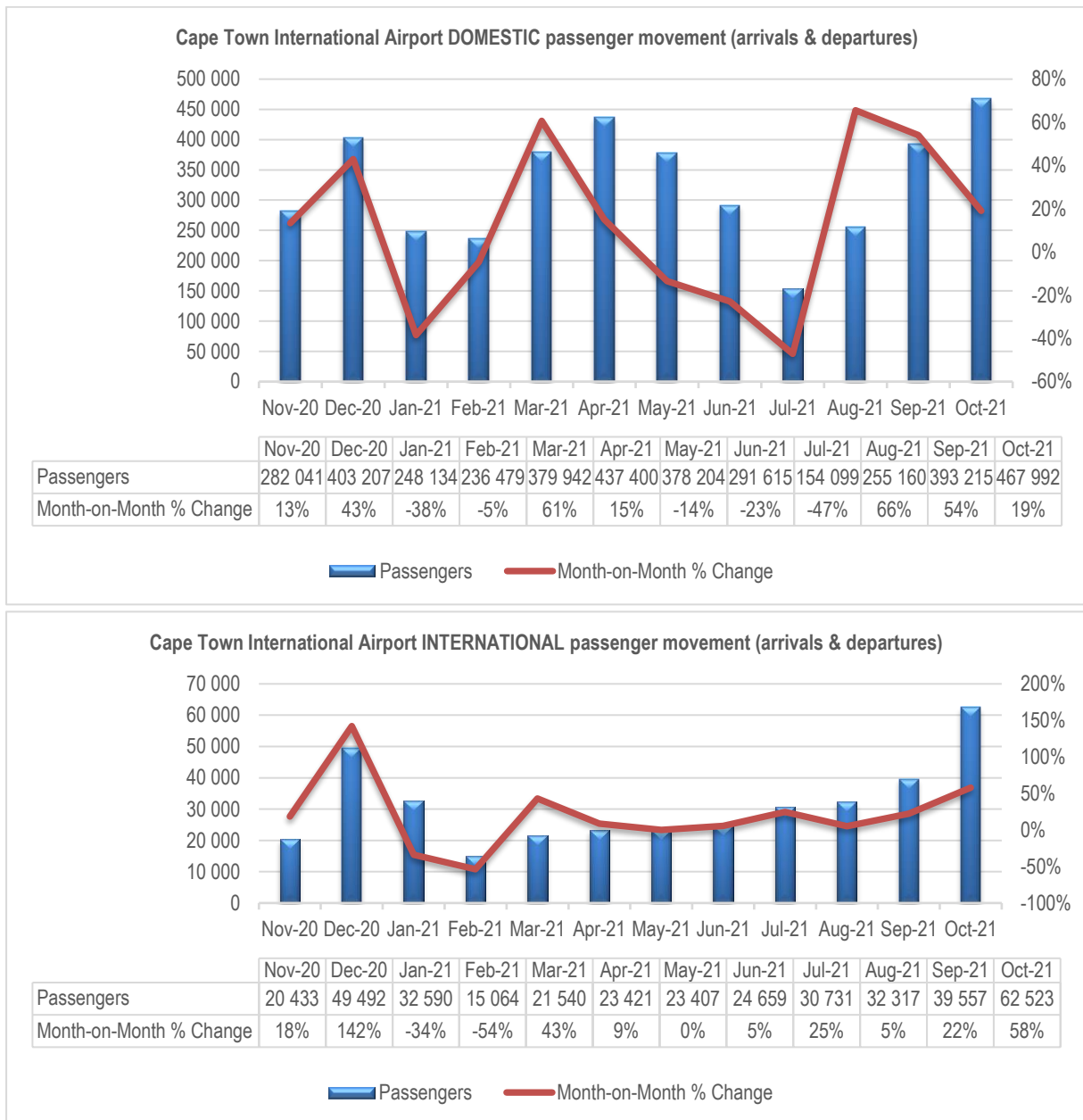


Source: Airports Company South Africa, 2021

TOP INTERNATIONAL SOURCE COUNTRIES TO THE WESTERN THROUGH CTIA					
RANK	SOURCE COUNTRY	JAN - SEP 2019	JAN - SEP 2020	JAN - SEP 2021	RECOVERY %
1	Namibia	62370	22960	26246	42%
2	Zimbabwe	32294	11199	16711	52%
3	USA	113573	41051	13002	11%
4	Angola	33513	13777	11978	36%
5	Germany	151839	87702	11104	7%
6	United Kingdom	189524	106436	7944	4%
7	Netherlands	57441	28323	7538	13%
8	United Arab Emirates	17720	5816	7040	40%
9	Ethiopia	4278	1657	6745	158%
10	Kenya	24681	7266	6424	26%
11	Philippines	4890	1714	5930	121%
12	Nigeria	16519	4638	4990	30%
13	France	52799	20425	4869	9%
14	Turkey	9223	4159	4850	53%
15	Botswana	15941	5728	4815	30%

Source: OAG Traffic Analyser, 2021

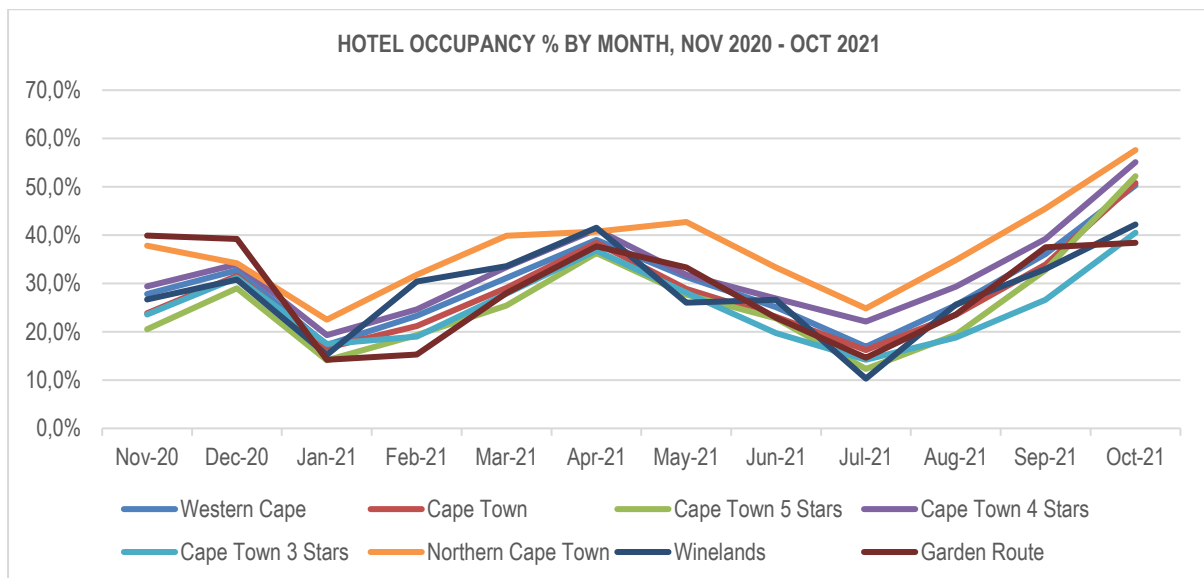
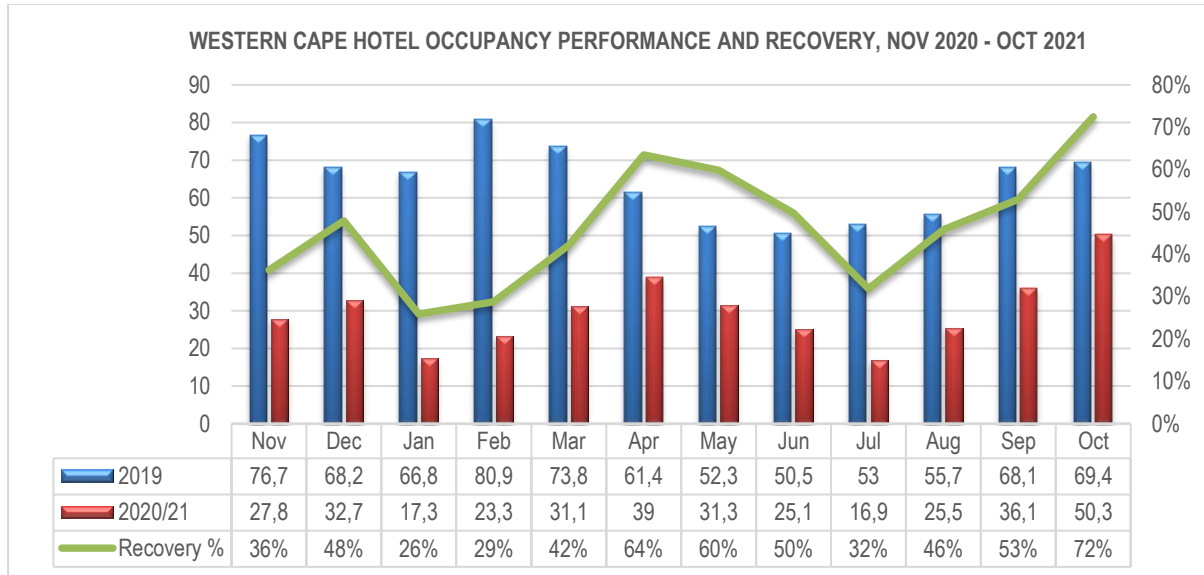
- Passenger movement (arrivals and departures) increased sporadically through the Domestic terminal. A month-to-month comparison reveals a peak in March, August and September 2021, which coincides with the easing of lockdown restrictions after the third wave. Domestic arrivals and departures has seen quicker recovery than international passenger movement.
- However, unlike domestic arrivals and departures, international passenger movement has remained steady despite the third wave of COVID-19 infections between May and July 2021, increasing by 5% from May to June and 25% from June to July. In addition, a further 58% increase was recorded from September to October. Passenger movement through CTIA's international airport nearly tripled from October 2020 to December 2020 and grew by 262% from 17 255 passengers in October 2020 to 62 523 passengers in October 2021.



Source: Airports Company South Africa, 2021

2. Hotel Occupancy

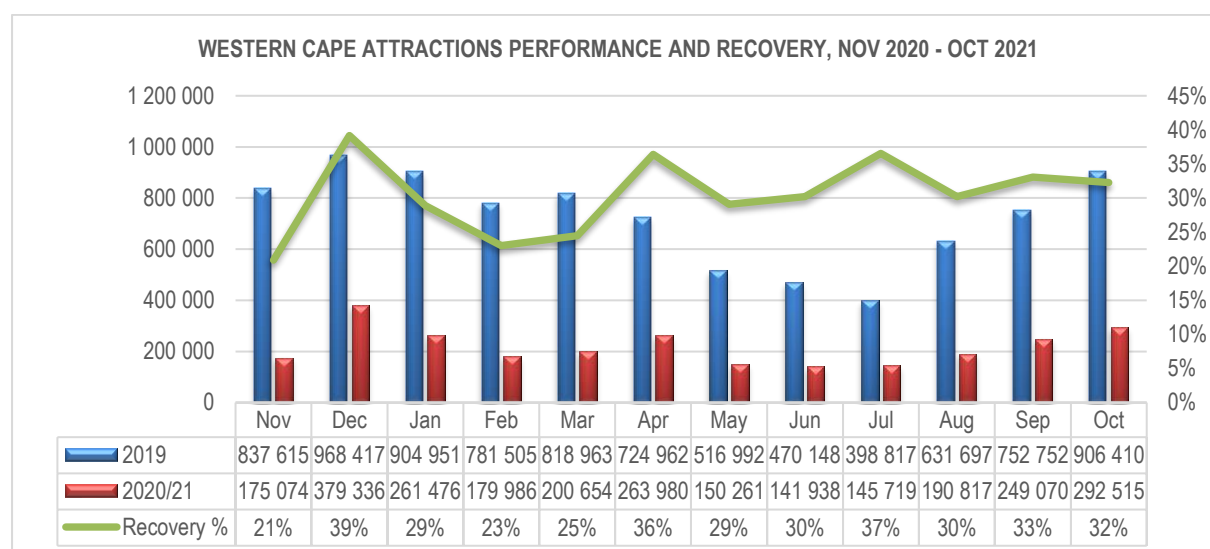
- Hotel Occupancy in the Western Cape reached its peak at 50% in October 2021, with a recovery rate of 72% when compared to 2019.
- As at October 2021, the year to date occupancy percentage in the Western Cape reached 29,6% compared to 62,5% over the same period in 2019 and 37% in 2020. For the period January to October 2021, revenue per average room was R337.64, compared to R 981.99 in 2019 and R639.55 in 2020.



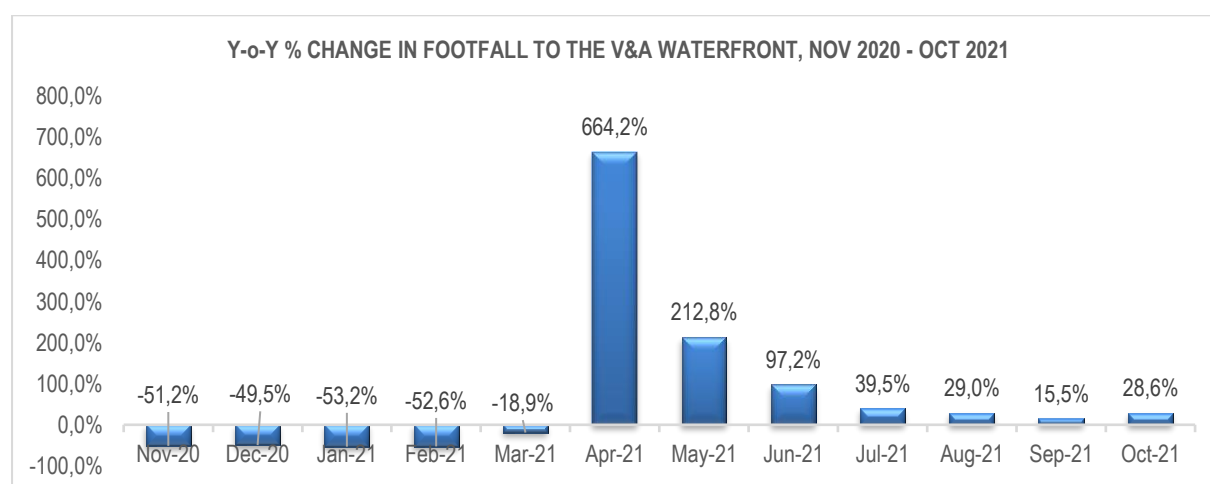
Source: STR Global, 2021

3. Western Cape Attractions

- Visitors to the participating Western Cape Attractions reached 292 515 in October 2021, a 32% recovery rate when compared to October 2019.
- Outdoor attractions in the Cape Overberg, Weskus, Garden Route and Karoo regions remain popular with many still exceeding 2019 visitor numbers, in some months, since July 2020.
- Visitor numbers to the V&A Waterfront recovered slowly since the Level 5 Lockdown in April 2020. April and May figures showed a substantial improvement as they are compared to Level 5 lockdown over that period in 2020. School holidays and significantly wetter weather during winter also prompted visitors to look for indoor entertainment. The change in Lockdown Levels, from two to one, in October reduced the curfew, increased the amount of patrons allowed in restaurants and increased the days on which alcohol could be sold.



Source: SANParks, LTO's, and Attractions, 2021



Source: V&A Waterfront, 2021

PARTICIPATING REGIONAL ATTRACTIONS - MONTHLY RECOVERY PERCENTAGE												
ATTRACTIONS	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21
Cape Town												
Kirstenbosch Botanical Gardens	50%	71%	64%	50%	46%	57%	55%	56%	58%	52%	55%	53%
Robben Island	6%	16%	10%	5%	9%	20%	14%	14%	3%	5%	14%	27%
Table Mountain National Park	17%	35%	22%	20%	21%	32%	25%	25%	33%	23%	26%	27%
Table Mountain National Park: Boulders	8%	26%	9%	13%	13%	23%	15%	17%	17%	15%	22%	26%
Table Mountain National Park: Cape of Good Hope	15%	31%	23%	18%	19%	28%	24%	36%	24%	18%	21%	25%
Table Mountain Aerial Cableway	15%	34%	20%	13%	18%	28%	21%	19%	79%	24%	26%	25%
Cape Overberg												
Cape Agulhas Lighthouse	0%	0%	0%	0%	0%	0%	42%	36%	74%	44%	50%	57%
Agulhas National Park	9%	9%	7%	8%	8%	12%	47%	37%	72%	44%	44%	52%
Bontebok National Park	94%	61%	84%	59%	66%	106%	76%	53%	88%	59%	39%	61%
De Hoop Nature Reserve	8%	32%	59%	55%	47%	106%	113%	172%	138%	46%	81%	69%
De Mond Nature Reserve	0%	94%	51%	101%	52%	167%	66%	56%	136%	70%	106%	166%
Harold Porter National Botanical Gardens	64%	76%	200%	97%	85%	75%	110%	63%	145%	86%	67%	92%
Kogelberg Nature Reserve	141%	93%	379%	101%	75%	38%	80%	81%	207%	111%	121%	102%
Shipwreck Museum	23%	81%	20%	13%	30%	57%	20%	4%	0%	31%	9%	54%
Garden Route												
Cango Caves	8%	21%	21%	7%	13%	31%	16%	14%	2%	15%	19%	29%
Wilderness National Park	62%	71%	75%	56%	59%	103%	97%	70%	130%	68%	56%	88%
Tsitsikamma National Park	19%	40%	41%	22%	28%	54%	46%	42%	43%	26%	34%	38%
Knysna National Park	105%	114%	170%	61%	76%	146%	128%	54%	139%	103%	61%	128%
WESKUS												
West Coast National Park	97%	64%	34%	79%	70%	86%	67%	51%	60%	111%	93%	69%
!Khwattu	31%	43%	55%	42%	41%	86%	96%	64%	58%	75%	75%	74%
Old Jail	104%	77%	79%	86%	52%	92%	69%	35%	73%	119%	130%	124%
Cape Karoo												
Karoo National Park	101%	77%	75%	62%	74%	121%	115%	58%	124%	99%	71%	123%

Sources: SANParks, LTO's, and Attractions, 2021

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