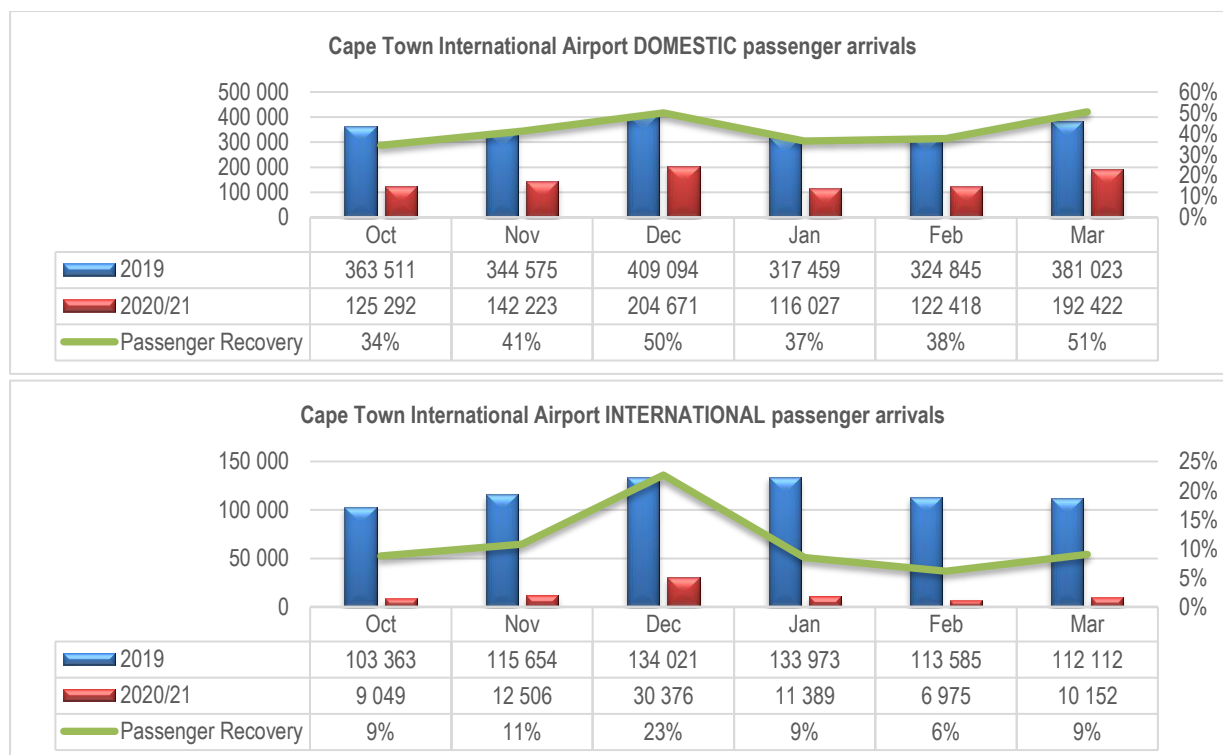


Western Cape Tourism Recovery: 2020/21

The COVID-19 pandemic had a devastating impact on the tourism industry in 2020. The United Nations World Tourism Organisation (UNWTO) estimates that the global travel industry lost an estimated USD 1.3 trillion and placed at least 100 million direct tourism jobs at risk. This report aims to measure tourism recovery in the Western Cape over the period October 2020 to March 2021, by comparing it to the corresponding 2019 tourism figures.

1. Cape Town International Airport (CTIA) Passenger Movement

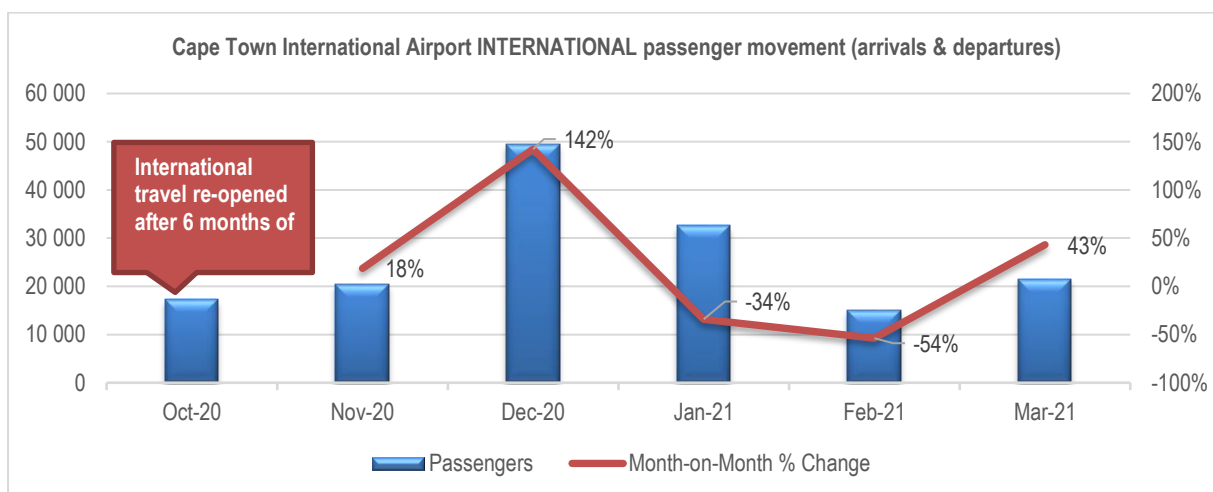
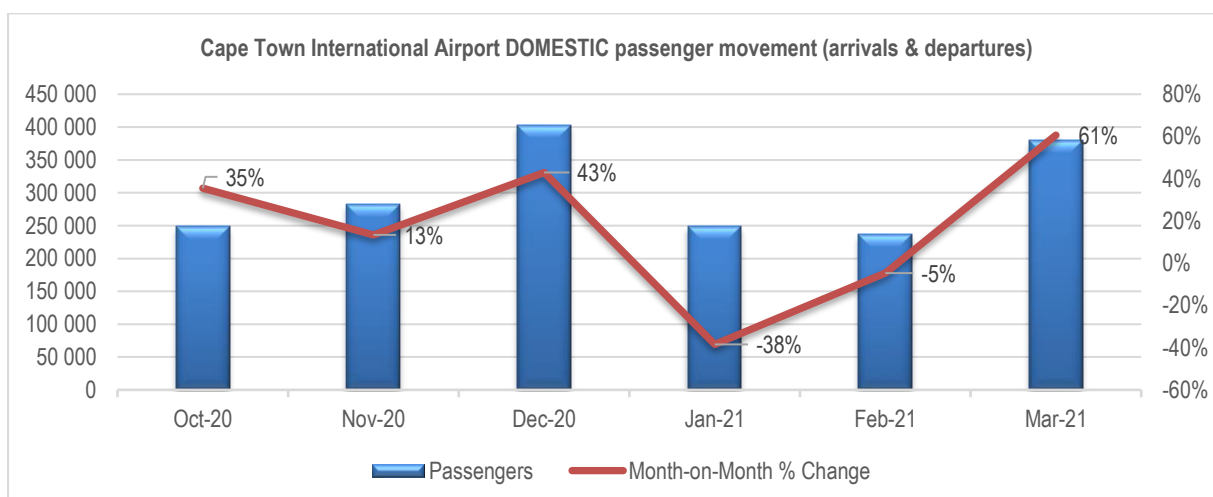
- Passenger arrivals through Cape Town International Airport domestic terminal was highest in December 2020 with 204 671 passengers, representing a 50% recovery rate when compared to the same period in 2019. Recovery was slower in January and February 2021 but picked up in March 2021, with a recovery rate of 51% when compared to March 2019.
- International recovery has been slower with passenger arrivals through the airport's international terminal going from 134 021 in December 2019 to 30 376 over the same period in 2020, a recovery rate of 23%.
- Germany has remained one of the province's top international source markets. However, other European markets have declined significantly. African markets like Namibia, Zimbabwe, Angola, Kenya and Ethiopia have recovered more steadily. Visitor arrivals from Ethiopia, in particular, exceeded their Q1 2019 figure by more than 50% in the first quarter of 2021. Russia and the Philippines also showed promising recovery in 2020/21 with the latter reaching 99% of the 2019 levels.
- Passenger movement (arrivals and departures) increased steadily through both the Domestic and International terminals. A month-to-month comparison reveals a peak in December 2020, likely due to the end of year holidays. Domestic passenger movement was particularly high in March 2021, likely due to school holidays and the lead up to Easter weekend at the beginning of April. International borders re-opened for travel in mid-October after being closed since April 2020.



Source: Airports Company South Africa, 2021

TOP INTERNATIONAL SOURCE COUNTRIES TO THE WESTERN CAPE					
RANK	SOURCE COUNTRY	JAN - MAR 2019	JAN - MAR 2020	JAN - MAR 2021	RECOVERY %
1	Namibia	23 440	18 930	7 215	31%
2	Germany	84 543	86 654	3 935	5%
3	Zimbabwe	9 692	9 350	3 822	39%
4	Angola	13 080	10 324	3 549	27%
5	United Kingdom	102 324	105 044	3 288	3%
6	USA	38 588	40 486	2 684	7%
7	Kenya	8 983	6 454	2 506	28%
8	Netherlands	27 168	25 622	2 347	9%
9	Ethiopia	1 471	1 325	2 268	154%
10	Philippines	1 773	1 685	1 763	99%
11	Russian Federation	3 385	3 942	1 546	46%
12	France	24 640	19 475	1 435	6%
13	Switzerland	16 800	14 854	1 050	6%
14	Brazil	12 928	13 923	465	4%
15	Australia	13 937	14 363	80	1%

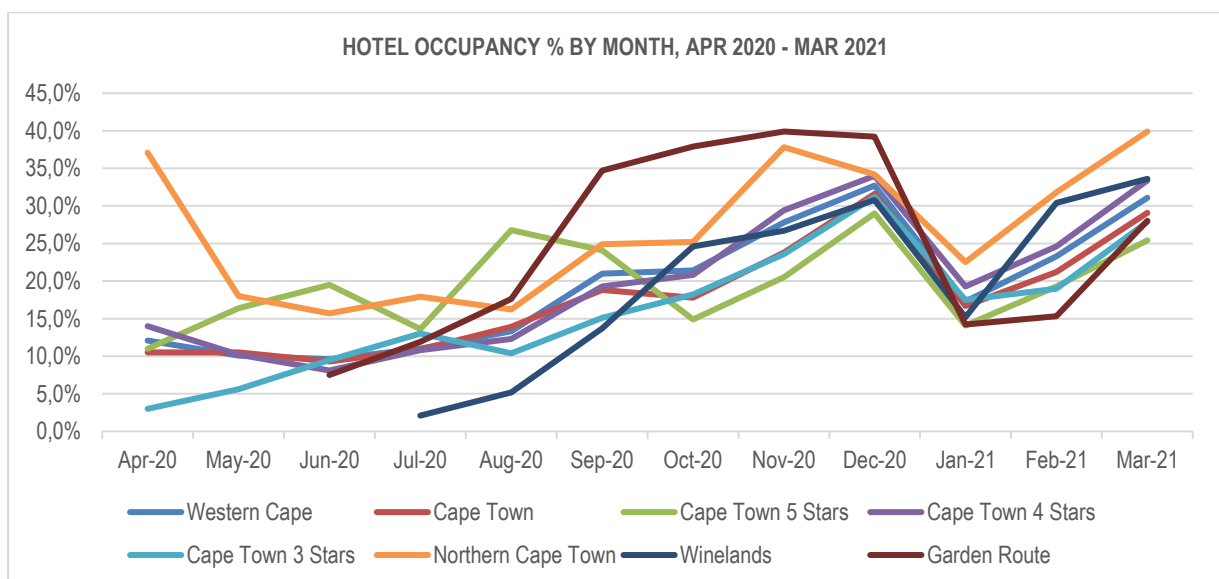
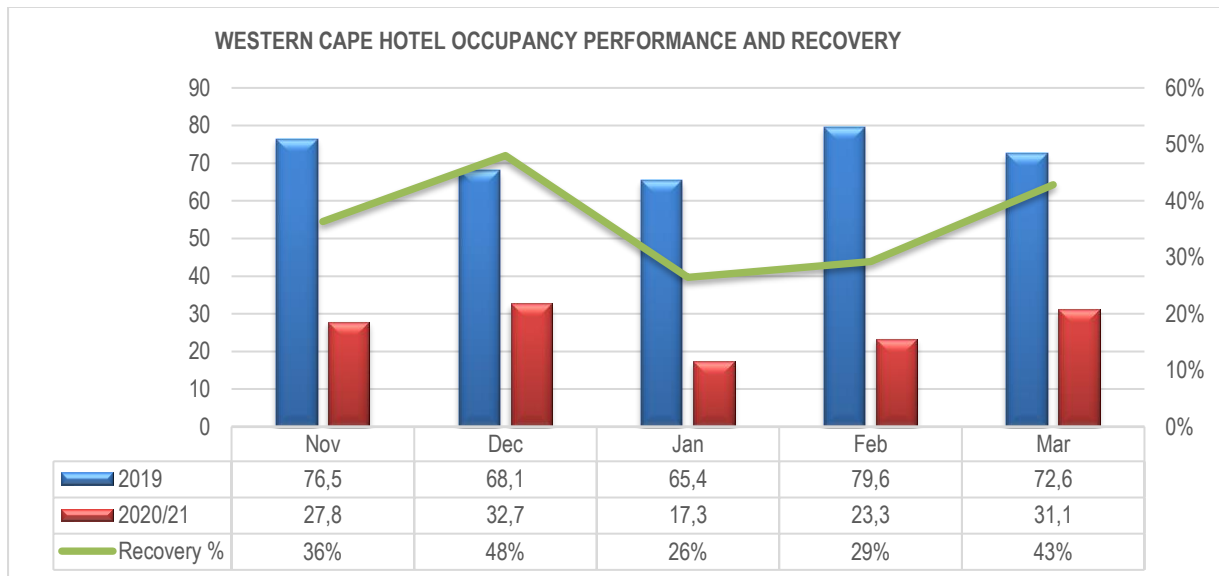
Source: OAG Traffic Analyser, 2021



Source: Airports Company South Africa, 2021

2. Hotel Occupancy

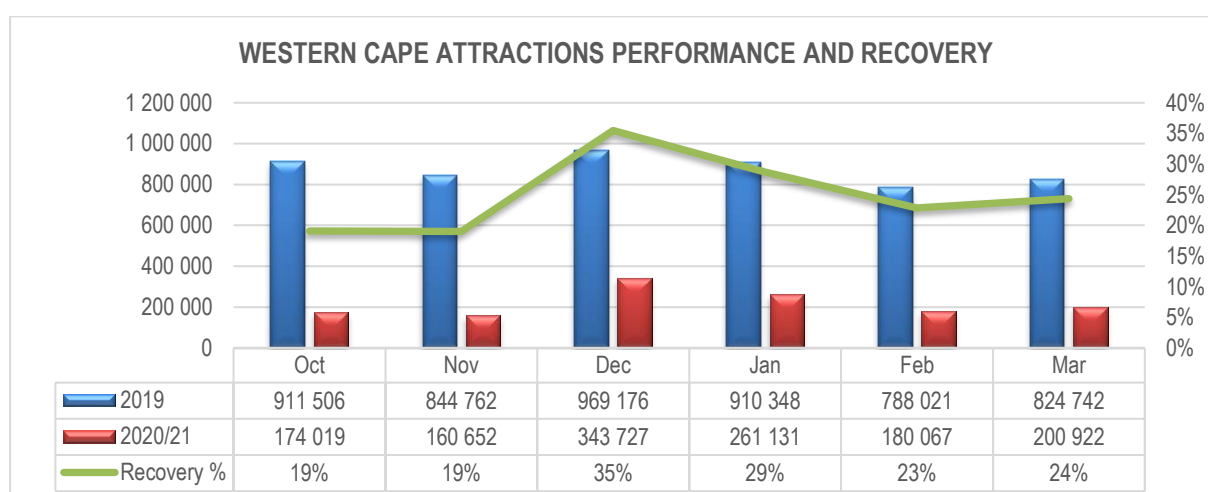
- Hotel Occupancy in the Western Cape reached its peak at 32,7% in December 2020, with a recovery rate of 48% when compared to 2019.
- As at March 2021, the year to date occupancy percentage in the Western Cape reached 23.9% compared to 72.3% over the same period in 2019 and 62.5% in 2020. For the period January to March 2021, revenue per average room was R269.52, compared to R 1357.76 in 2019 and R1234,38 in 2020.



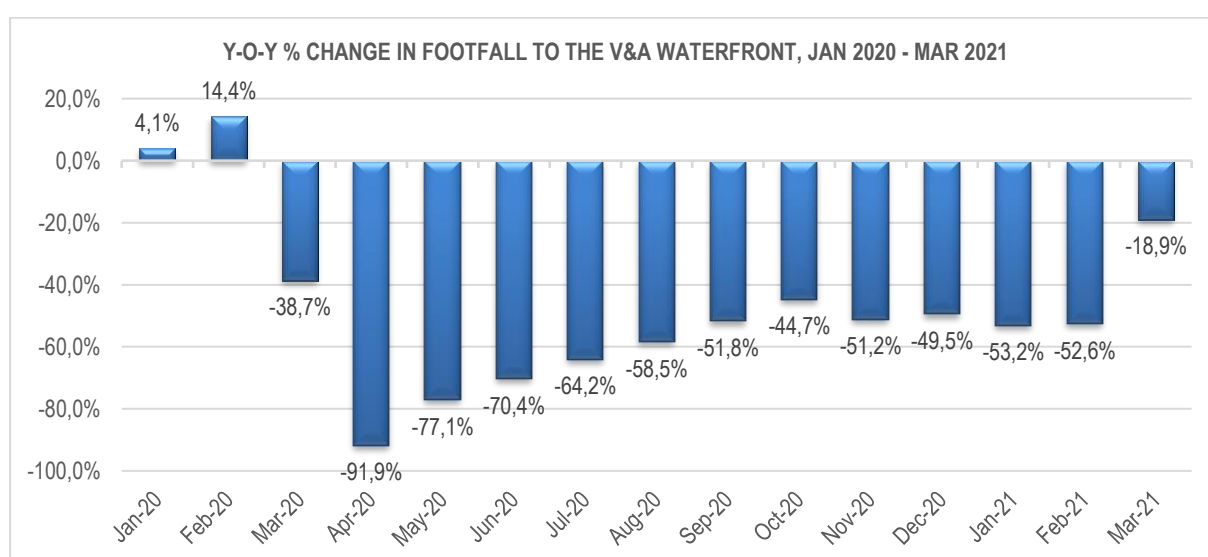
Source: STR Global, 2021

3. Western Cape Attractions

- Visitors to the participating Western Cape Attractions reached 343 727 in December 2020, a 35% recovery rate when compared to December 2019.
- Outdoor attractions such as Harold Porter Botanical Gardens, De Mond Nature Reserve, Koggelberg Nature Reserve, Knysna National Park, and Karoo National Park were popular with many having already exceeded 2019 visitor numbers over November 2020 to March 2021 period. In January 2021, Harold Porter Botanical Gardens saw twice the number of visitors and Koggelberg Nature Reserve saw close to 4 times the amount of visitors when compared to the same month in 2019.
- The increased number of visitors to outdoor attractions can be attributed to warmer weather in the summer months as well as the desire among locals for open spaces that facilitates physical distancing.
- Visitor numbers to the V&A Waterfront recovered slowly since the Level 5 Lockdown in April 2020. October 2020 was its best month with a year-on-year decline of 44.7%, likely due to school holidays. The smaller year-on-year decrease in March 2021 is because March 2020 had already seen some negative impact on the footfall, as people were encouraged to stay away from busy places around mid-month. The V&A Waterfront remains impacted by the lack of international tourists as well as the absence of large annual events like Mining Indaba and Design Indaba.



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



Source: V&A Waterfront, 2021

PARTICIPATING REGIONAL ATTRACTIONS - MONTHLY RECOVERY PERCENTAGE						
ATTRACTIONS	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21
Cape Town						
Kirstenbosch Botanical Gardens	58%	50%	71%	64%	50%	46%
Robben Island	6%	6%	16%	10%	5%	9%
Table Mountain National Park	9%	12%	25%	22%	20%	21%
Table Mountain National Park: Boulders	7%	8%	26%	9%	13%	13%
Table Mountain National Park: Cape of Good Hope	12%	15%	31%	23%	18%	19%
Table Mountain Aerial Cableway	18%	15%	34%	20%	13%	18%
Cape Overberg						
Agulhas National Park	7%	9%	9%	7%	8%	8%
Bontebok National Park	67%	94%	61%	84%	59%	66%
De Hoop Nature Reserve	13%	8%	32%	59%	55%	47%
De Mond Nature Reserve	156%	0%	94%	51%	101%	52%
Harold Porter National Botanical Gardens	89%	64%	76%	200%	97%	85%
Kogelberg Nature Reserve	132%	141%	93%	379%	101%	75%
Stony Point	3%	1%	1%	8%	10%	18%
Shipwreck Museum	0%	23%	81%	20%	13%	30%
Garden Route						
Cango Caves	15%	8%	21%	21%	7%	13%
Wilderness National Park	69%	62%	71%	75%	56%	59%
Tsitsikamma National Park	22%	19%	40%	41%	22%	28%
Knysna National Park	104%	105%	114%	170%	61%	76%
WESKUS						
!Khwattu	44%	31%	43%	-	-	-
Old Jail	273%	104%	77%	79%	86%	52%
West Coast National Park	96%	97%	64%	34%	79%	70%
Cape Karoo						
Karoo National Park	103%	101%	77%	75%	62%	74%

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

DISCLAIMER: Wesgro has taken every effort to ensure that the information in this publication is accurate. We provide said information without representation or guarantee whatsoever, whether expressed or implied. It is the responsibility of users of this publication to satisfy themselves of the accuracy of information contained herein. Wesgro cannot be held responsible for the contents of the publication in any way.

© Wesgro, 2021.