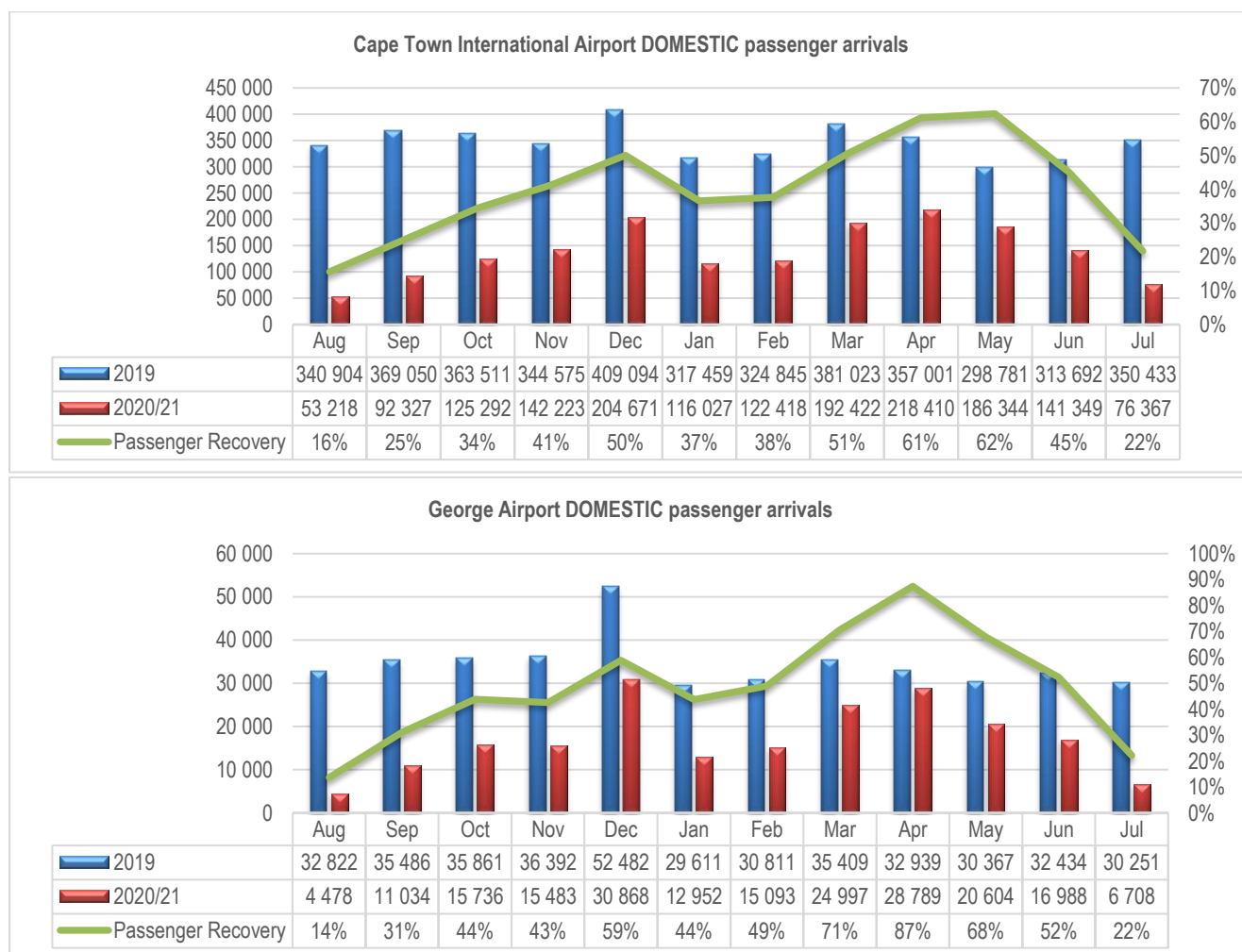


Western Cape Tourism Recovery: August 2021

More than a year and a half 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 August 2020 to July 2021, by comparing it to the 2019 tourism figures.

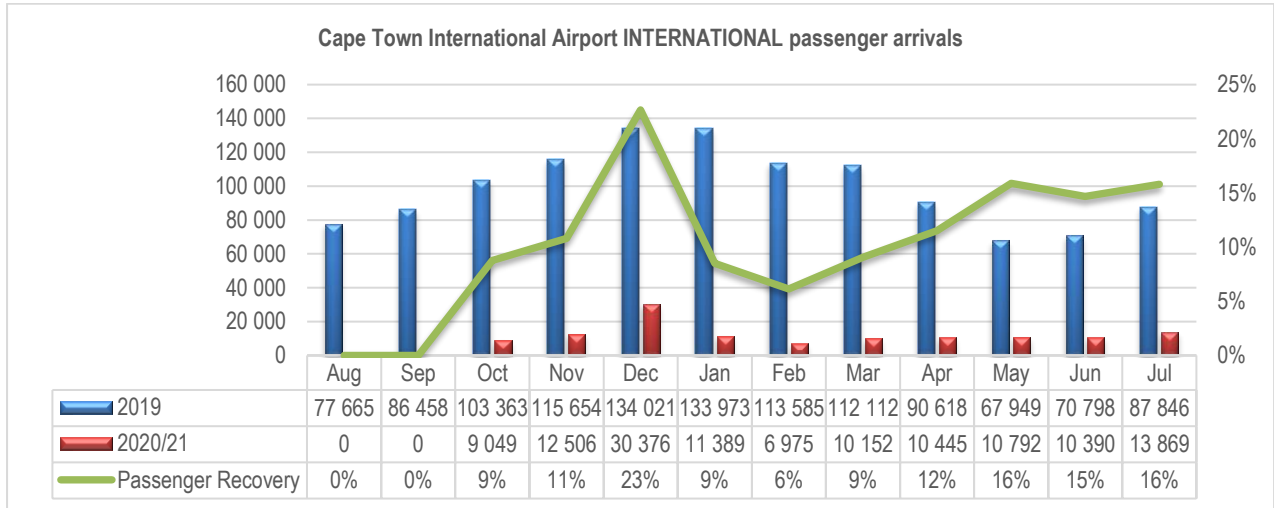
1. Cape Town International Airport (CTIA) Passenger Movement

- Passenger arrivals through Cape Town International Airport domestic terminal were highest in April 2021 with 218 410 passengers, representing a 61% 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.
- George Airport saw domestic arrivals reach 28 789 passengers in April with a recovery rate of 87% when compared to the same month in 2019.



Source: Airports Company South Africa, 2021

- International recovery has been slower, reaching its peak in May 2021 with a 16% recovery rate.
- Germany has remained one of the province's top international source markets, while 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 Jan - Jun figure by more than 50% over the same period in 2019. Turkey, Russia and the Philippines also showed promising recovery in 2020/21 with the latter exceeding 2019 levels by 25%.

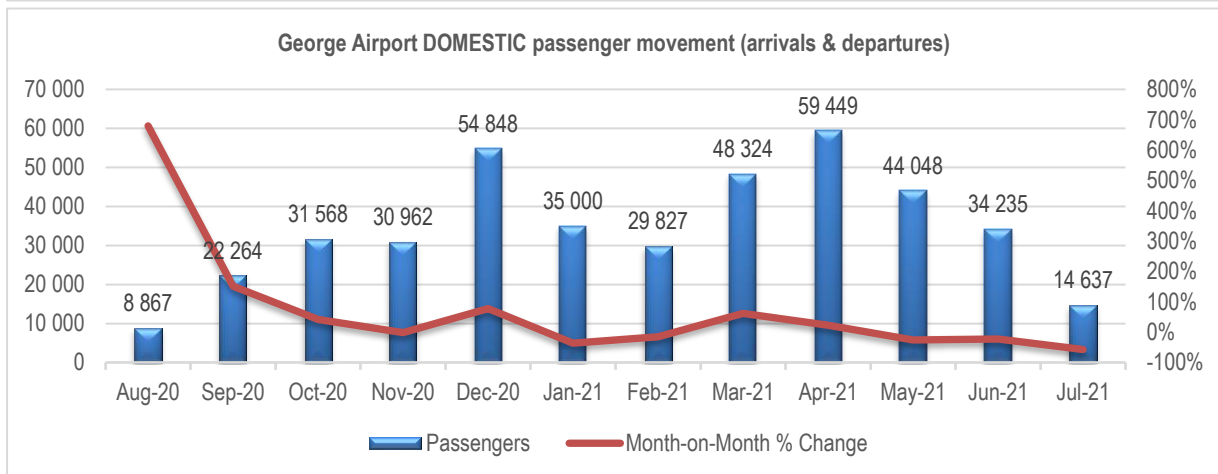
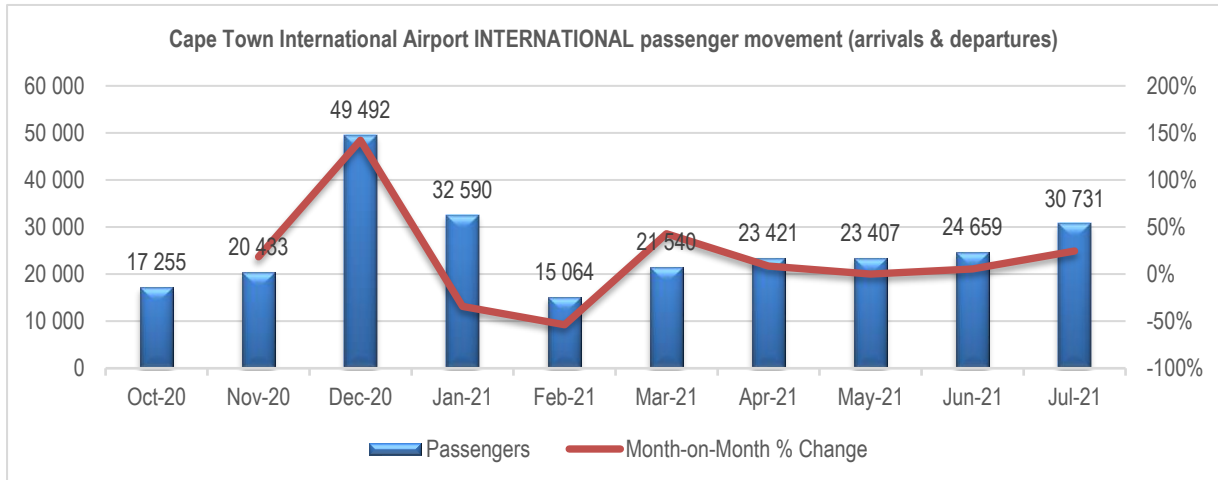
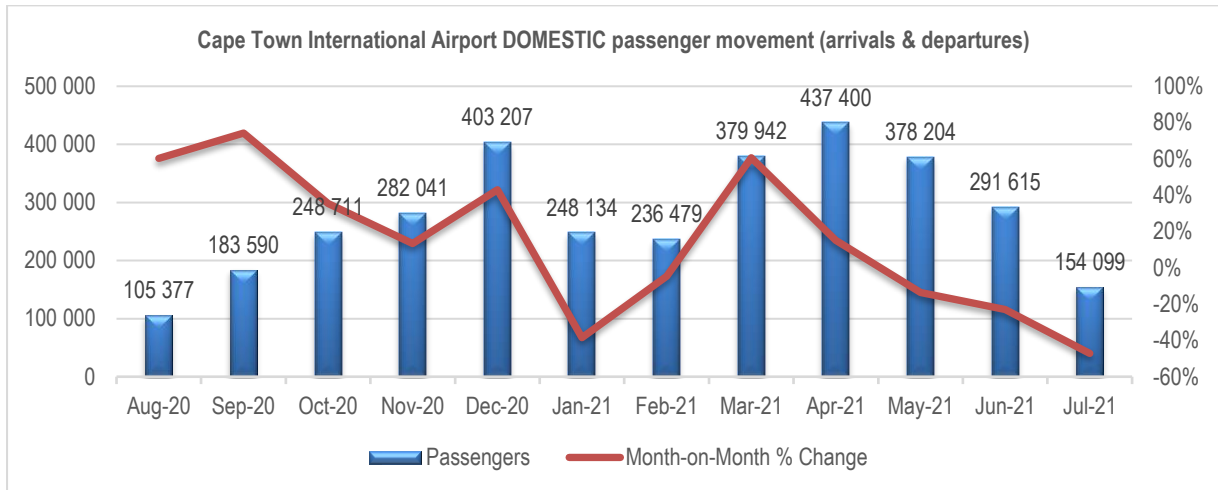


Source: Airports Company South Africa, 2021

TOP INTERNATIONAL SOURCE COUNTRIES TO THE WESTERN CAPE					
RANK	SOURCE COUNTRY	JAN - JUN 2019	JAN - JUN 2020	JAN - JUN 2021	RECOVERY %
1	Namibia	43 732	21 278	18 864	43%
2	Zimbabwe	22 181	10 153	11 726	53%
3	Angola	22 338	11 132	7 951	36%
4	Germany	119 610	87 060	7 140	6%
5	USA	76 040	40 772	6 908	9%
6	United Kingdom	148 796	105 669	5 155	3%
7	Netherlands	39 699	26 156	4 999	13%
8	Kenya	16 578	6 972	4 866	29%
9	Ethiopia	2 673	1 332	4 162	156%
10	Philippines	3 247	1 696	4 062	125%
11	United Arab Emirates	11 428	5 556	4 011	35%
12	Turkey	6 212	4 113	3 697	60%
13	Russian Federation	5 871	4 103	2 890	49%
14	Nigeria	11 140	4 447	2 861	26%
15	France	37 958	19 731	2 827	7%

Source: OAG Traffic Analyser, 2021

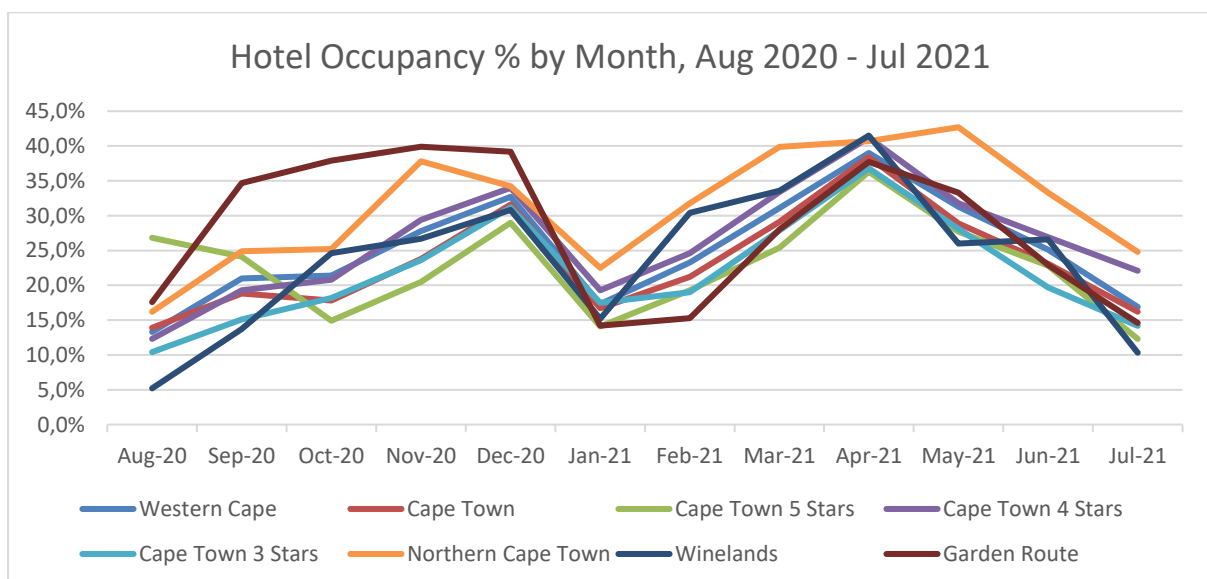
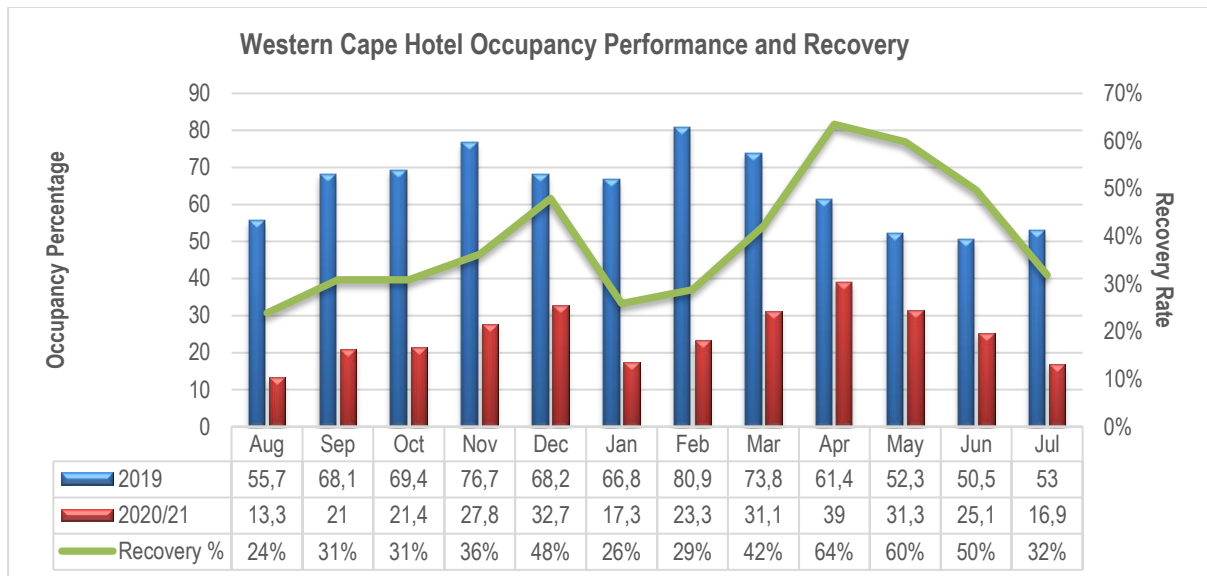
- Passenger movement (arrivals and departures) increased steadily through both the Domestic and International terminals. A month-to-month comparison reveals a peak in December 2020 and again in March 2021, likely due to school holidays, the festive season in December and the lead up to Easter weekend at the beginning of April.
- 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. Passenger movement through CTIA's international airport nearly tripled from October to December 2020 and grew by 78% from October to July 2021.



Source: Airports Company South Africa, 2021

2. Hotel Occupancy

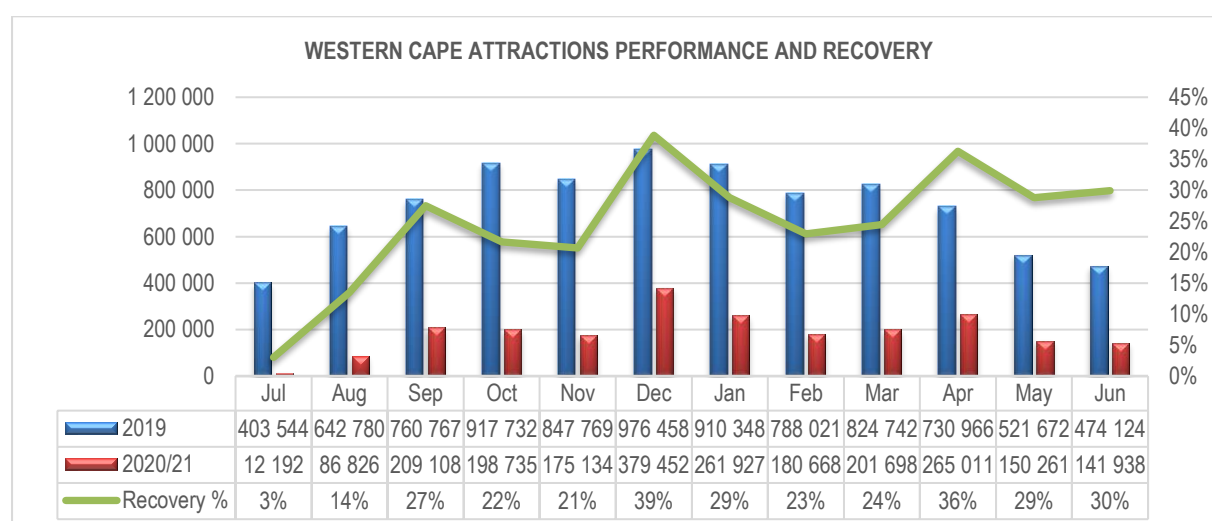
- Hotel Occupancy in the Western Cape reached its peak at 39% in April 2021, with a recovery rate of 64% when compared to 2019.
- As at July 2021, the year to date occupancy percentage in the Western Cape reached 25,9% compared to 61,7% over the same period in 2019 and 45,7% in 2020. For the period January to July 2021, revenue per average room was R291.24, compared to R 1 000.02 in 2019 and R858.80 in 2020.



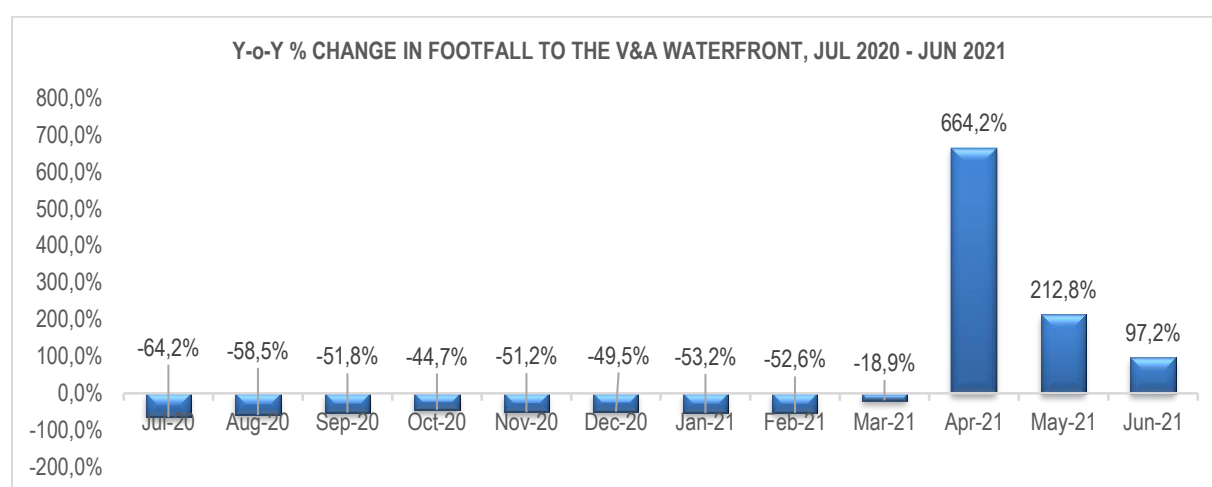
Source: STR Global, 2021

3. Western Cape Attractions

- Visitors to the participating Western Cape Attractions reached 343 727 in December 2020, a 39% recovery rate when compared to December 2019, followed by 265 011 visitors in April with a recovery rate of 36%.
- Outdoor attractions such as Harold Porter Botanical Gardens, De Mond Nature Reserve, Koggelberg Nature Reserve, Bontenok National Park, De Hoop Nature Reserve, Knysna National Park, Wilderness National Park, West Coast National Park and Karoo National Park were popular with many having already exceeded 2019 visitor numbers in some months since July 2020.
- 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. 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. A big improvement from April 2021 as the figures are being compared against level 4 hard lockdown in 2020. The traditional winter drop off was visible in June but the differential from May to June was worse than it has been in the recent past. Other than the broader COVID implications, this can be ascribed to the reduction in trading hours, rainy weather, and lack of school holidays.



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



Source: V&A Waterfront, 2021

PARTICIPATING REGIONAL ATTRACTIONS - MONTHLY RECOVERY PERCENTAGE												
ATTRACTIONS	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21
Cape Town												
Kirstenbosch Botanical Gardens	0%	46%	58%	58%	50%	71%	64%	50%	46%	57%	55%	56%
Robben Island	0%	0%	2%	6%	6%	16%	10%	5%	9%	20%	14%	14%
Table Mountain National Park	2%	3%	16%	16%	17%	35%	22%	20%	21%	32%	25%	25%
Table Mountain National Park: Boulders	0%	0%	2%	7%	8%	26%	9%	13%	13%	23%	15%	17%
Table Mountain National Park: Cape of Good Hope	3%	7%	12%	12%	15%	31%	23%	18%	19%	28%	24%	36%
Table Mountain Aerial Cableway	1%	2%	33%	18%	15%	34%	20%	13%	18%	28%	21%	19%
Cape Overberg												
Cape Agulhas Lighthouse	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	42%	36%
Agulhas National Park	0%	3%	7%	7%	9%	9%	7%	8%	8%	12%	47%	37%
Bontebok National Park	35%	47%	36%	67%	94%	61%	84%	59%	66%	106%	76%	53%
De Hoop Nature Reserve	39%	16%	23%	13%	8%	32%	59%	55%	47%	106%	113%	172%
De Mond Nature Reserve	46%	53%	141%	156%	0%	94%	51%	101%	52%	167%	66%	56%
Harold Porter National Botanical Gardens	0%	78%	57%	89%	64%	76%	200%	97%	85%	75%	110%	63%
Kogelberg Nature Reserve	165%	124%	193%	132%	141%	93%	379%	101%	75%	38%	80%	81%
Stony Point	0%	0%	6%	3%	1%	1%	8%	10%	18%	17%	-	-
Shipwreck Museum	0%	0%	0%	0%	23%	81%	20%	13%	30%	57%	20%	4%
Garden Route												
Cango Caves	0%	0%	11%	15%	8%	21%	21%	7%	13%	31%	16%	14%
Wilderness National Park	0%	19%	48%	69%	62%	71%	75%	56%	59%	103%	97%	70%
Tsitsikamma National Park	0%	6%	25%	22%	19%	40%	41%	22%	28%	54%	46%	42%
Knysna National Park	0%	30%	57%	104%	105%	114%	170%	61%	76%	146%	128%	54%
WESKUS												
West Coast National Park	51%	102%	117%	96%	97%	64%	34%	79%	70%	86%	67%	51%
!Khwattu	58%	64%	64%	44%	31%	43%	55%	42%	41%	86%	96%	64%
Old Jail	0%	22%	190%	273%	104%	77%	79%	86%	52%	92%	69%	35%
Cape Karoo												
Karoo National Park	17%	41%	58%	103%	101%	77%	75%	62%	74%	121%	115%	58%

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

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