

Cape Town Regional Trends



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1. Executive Summary

- Since the activation of economic activity and the gradual reopening of tourism offerings, recovery has been slow. However, with the implementation of strict safety measures across the tourism industry, and a stronger reassurance from our key role-players, the sector is set to tackle the challenges that comes with the 'new normal'.
- The attractions highlighted in this report collectively welcomed a total of 937,200 visitors between January and June 2021. Based on visitor levels in 2019, the overall monthly recovery rate has been between 22% and 32% across the 6-month period.
- By individual attraction, Kirstenbosch National Botanical Garden reflected the strongest (54.8%) recovery in visitor numbers when compared to the same period in 2019.
- Hotel Occupancy in Cape Town reached it's peak at 38,4% in April 2021, with a recovery rate of 62,5% when compared to 2019. March 2021 ranked second with 29,1% occupancy and a recovery rate of 39.0%.
- International arrivals decreased by 81.4% in the first half of 2021, reaching a total of 60 143 passengers compared to 322 624 over the same period in 2020. Based on 2019 passenger levels, the highest monthly recovery was seen in May (16%) and June (15%).
- Passengers through the domestic terminal was highest in April 2021 with 218 410, representing a 61% recovery rate when compared to the same period in 2019.
- This report includes an overview of the Tourism Sentiment Index (TSI) recorded between January and June 2021, with specific reference to COVID-19 Crisis Management.
- Over the 6-month period, more than 7,000 online conversations were analysed for the Western Cape and 3,611 specifically related to Cape Town.
- The overall emotional tone of online conversations for both the Western Cape and Cape Town was sadness in relation to the COVID-19 Crisis Index. The positive sentiments were specifically centered around medicine, treatments and technology, while the negative sentiments were driven by conversations around infections, mortality rate and regulations.
- The highest volume of conversations were centered around Health Services in Cape Town (60%) as
 well as in the Western Cape (64%). Travel was the second most common online conversation and
 ranked as the only category that revealed a more positive emotion (Joy) while sadness dominated
 amongst the remaining categories.





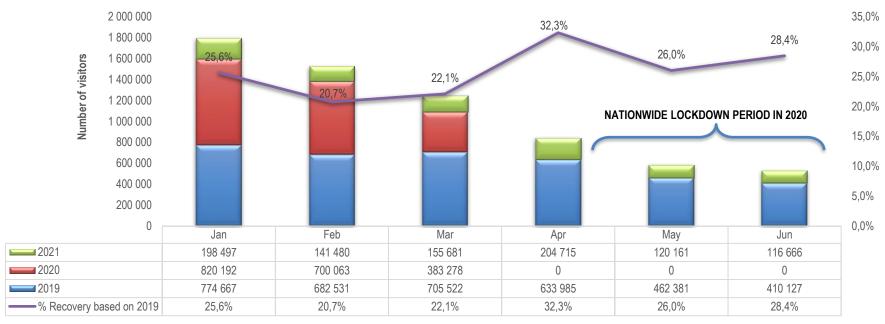
Attraction	Total Visitors Jan-Jun 2021	% Recovery based on 2019
Kirstenbosch National Botanical Garden	252 485	54,8%
Table Mountain Aerial Cableway	111 619	19,8%
Table Mountain National Park	370 342	23,8%
Table Mountain National Park: Boulders	58 471	14,5%
Table Mountain National Park: Cape of Good Hope	126 854	23,8%
Robben Island	17 429	11,5%

Sources: Table Mountain National Park, SANParks, Table Mountain Aerial Cableway, Robben Island, and Kirstenbosch National Botanical Garden, 2021

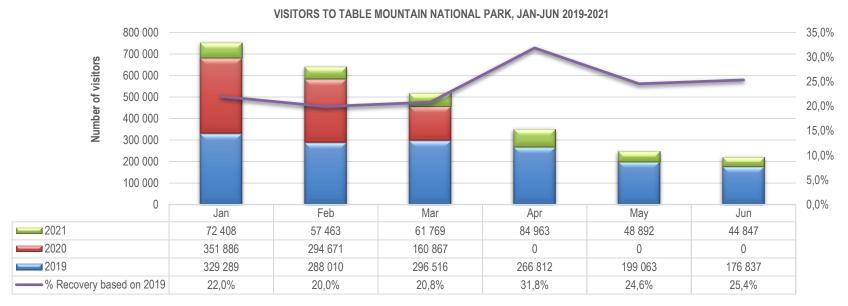
- For this section, visitor movement to Cape Town's top attractions were reviewed. These include the city's most iconic attractions for which visitor statistics were available.
- Over the Jan-Jun 2021 period the Cape Town attractions included in this report reached a total of 937,200 visitors.
- Unfortunately a year-on-year comparison could not be conducted due to the closure period between April and June 2020 (nationwide lockdown period).
- Based on visitor movement in 2019, the overall monthly recovery rate has been between 22% and 32% across the 6-month period.
- By individual attraction, Kirstenbosch National Botanical Garden reflected the strongest (54.8%) recovery in visitor numbers when compared to the same period in 2019.

% Recovery based on 2019

VISITORS TO CAPE TOWN ATTRACTIONS, JAN-JUN 2019-2021



Sources: Table Mountain National Park, SANParks, Table Mountain Aerial Cableway, Kirstenbosch National Botanical Garden and Robben Island, 2021



Source: SANParks, 2021

% Recovery based on 2019

Y-O-Y % CHANGE IN FOOTFALL TO THE V&A WATERFRONT, JAN-JUN 2021

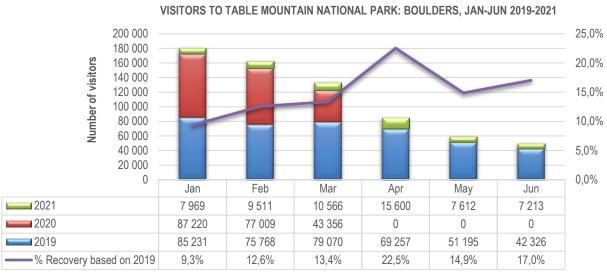


Source: V&A Waterfront, 2021

- In spite of the significant impact of COVID-19 on tourism businesses, the Table Mountain National Park welcomed over 370,000 visitors between January and June 2021. Based on 2019 visitor levels, the park recorded a recovery rate of between 20% and 32% across the first six months of 2021.
- When observing the year-on-year growth in footfall to the V&A Waterfront, the shopping centre also felt the effects associated with COVID-19. A decline of slightly over 50% was experienced in January and February 2021 respectively.
- The more positive performance experienced in April 2021 for the V&A was driven by the Easter weekend in the first part of the month, as well as Freedom Day falling on a mid-week day.
- In addition, government schools were also on holiday for the last week of the month and the shopping centre generally benefits when kids are not at school and looking for activities.

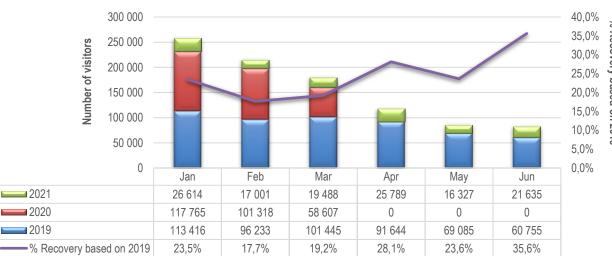
- The African Penguins can be found from southern Namibia all the way around the South African coast to Port Elizabeth; however, few places offer as remarkable a viewing point as Boulders beach.
- Between January and June 2021 Boulders attracted over 58,000 visitors, recording the highest number in April (15,600). The maximum recovery in visitor levels was also experienced in April (22.5%).

- The Cape of Good Hope nature reserve within Table Mountain National Park forms part of the Cape Floral Region, a World Heritage Site. It includes the majestic Table Mountain chain, which stretches from Signal Hill to Cape Point, coupled with the coastlines of the Cape Peninsula.
- This narrow stretch of land contains a mix of extraordinarily diverse and unique fauna and flora.
- The Cape of Good Hope welcomed 126,854 visitors between January and June 2021 and reflected the highest recovery in visitor levels (compared to 2019) during June 2021 (35.6%).



Source: Table Mountain National Park. 2021

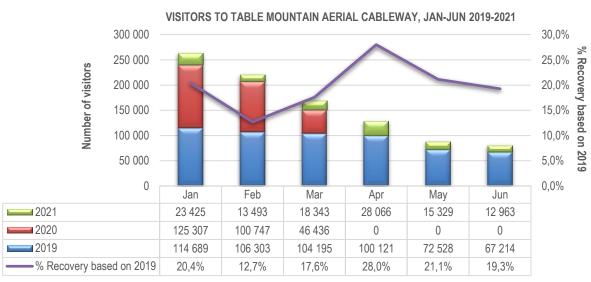
VISITORS TO TABLE MOUNTAIN NATIONAL PARK: CAPE OF GOOD HOPE. JAN-JUN 2019-2021



Source: Table Mountain National Park 2021

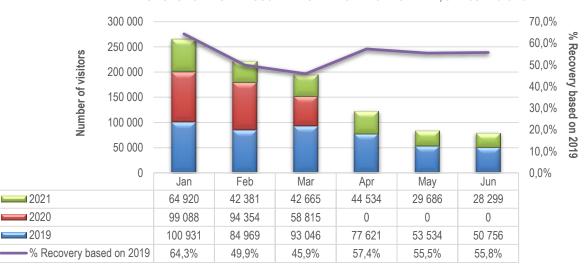
- The Table Mountain Aerial Cableway welcomed a total of 111,619 visitors into the first six months of 2021. While a yearon-year growth could not be determined due to the closure period between April and June 2020, the Cableway is seeing good recovery when compared to 2019 visitor levels.
- April ranked as the strongest month with respect to visitor numbers (28,066) as well as recovery (28,0%).

- In 2004 the Cape Floristic Region, including Kirstenbosch, was declared a UNESCO World Heritage Site. Kirstenbosch is the first botanical garden in the world to be included within a natural World Heritage Site.
- It is important to note that the visitor numbers illustrated in the figure excludes concerts. Events such as the summer sunset concerts amongst others therefore serves as additional volume and economic contribution to the garden.
- Across the period under review, Kirstenbosch recorded over 250,000 visitors between January and June 2021. By month, January (64,920) saw the highest number in visitors and also reached close to 65% 2019 visitor numbers.
- Kirstenbosch was closed between April and July 2020 due to the impact of COVID-19 and reopened in August 2020. The visitor count in December 2020 more than doubled since the reopening in August. The first six months of 2021 has also shown strong recovery rates of between 50% and 64% when compared to 2019.



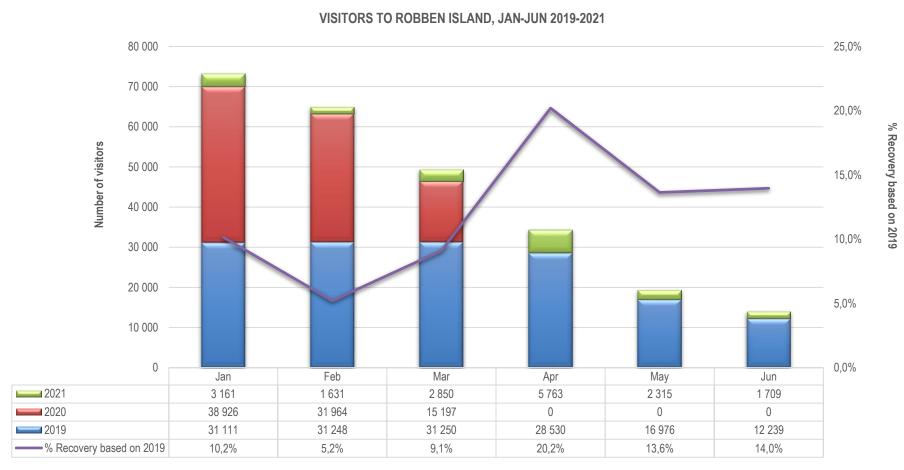
Source: Table Mountain Aerial Cableway, 2021

VISITORS TO KIRSTENBOSCH NATIONAL BOTANICAL GARDEN. JAN-JUN 2019-2021



Source: Kirstenbosch National Botanical Garden, 2021

Between January and June 2021, Robben Island welcomed a total of 17,429 visitors and reached the highest recovery rate in April (20.2%). The iconic attraction was closed during the nationwide lockdown period and recorded no visitors between April and August 2020. When observing 2019 visitor levels, recovery has been slower than anticipated, however, it should also be noted that Robben Island is a weather permitting attraction and the period under review in this report includes the start of the winter season.

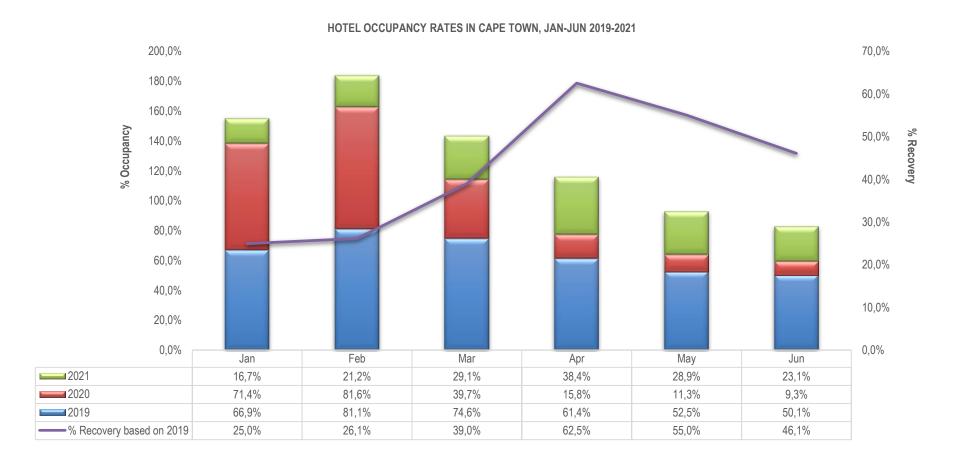


Source: Robben Island, 2021



3. Performance of Cape Town's Hotel Sector

• Hotel Occupancy in Cape Town reached it's peak at 38,4% in April 2021, with a recovery rate of 62,5% when compared to 2019. March 2021 ranked second with 29,1% occupancy and a recovery rate of 39,0%.



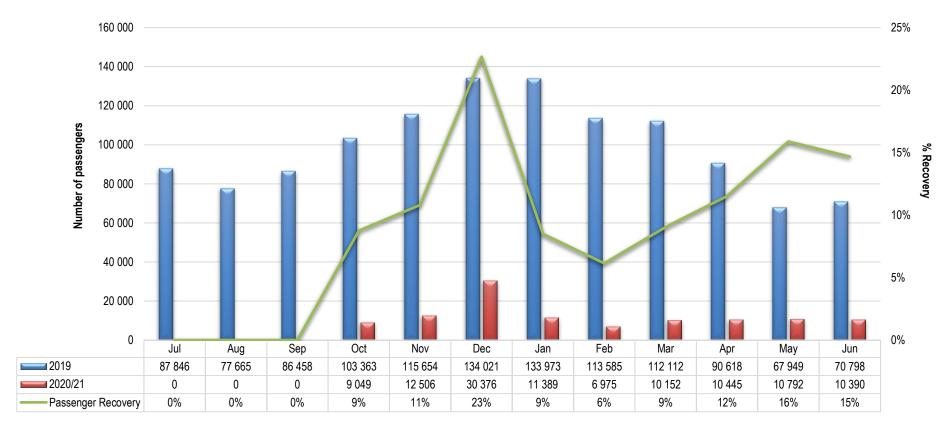
Notes: STR Global Hotel data provides a high-level overview of occupancy (OCC), average daily rate (ADR) and revenue per available room (RevPAR) for key geographical areas within SA. Source: STR Global, 2021



4. ACSA: Cape Town International Airport Arrivals: International Arrivals

• International arrivals decreased by 81.4% in the first half of 2021, reaching a total of 60 143 passengers compared to 322 624 over the same period in 2020. Based on 2019 passenger levels, the highest monthly recovery was seen in May (16%) and June (15%).

Cape Town International Airport INTERNATIONAL passenger arrivals

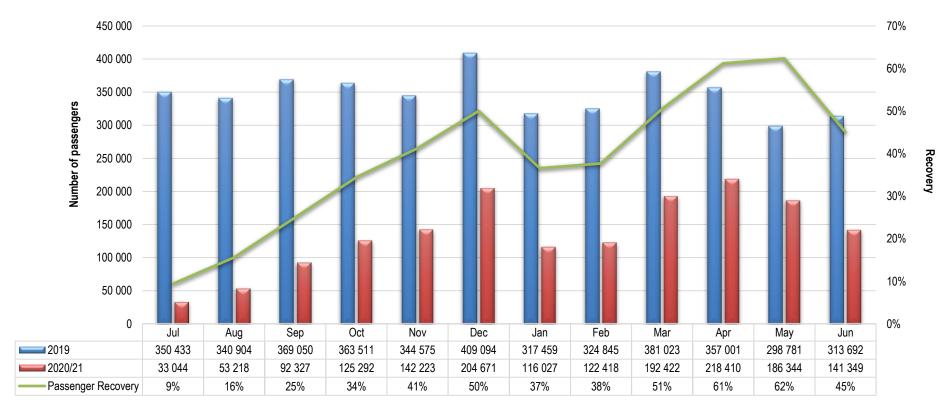


2019 2020/21 ——Passenger Recovery

4. ACSA: Cape Town International Airport Arrivals: Domestic Arrivals

• Passenger arrivals through Cape Town International Airport's domestic terminal was highest in April 2021 with 218 410 passengers, representing a 61% recovery rate when compared to the same period in 2019. Recovery was slower in January and February 2021 and retracted again in June, likely due to the second and third wave of COVID-19 cases.

Cape Town International Airport DOMESTIC passenger arrivals



2020/21

Passenger Recovery



5. Tourism Sentiment in Cape Town

- In 2021 Wesgro attained the Tourism Sentiment Index (TSI) data package which provides a Tourism Sentiment Score® for Cape and the Western Cape. The data package also provides specific insight into a COVID-19 Crisis Index.
- The sentiment score is a consolidated measure of a destination's ability to generate positive word of mouth about its tourism offering in real time. It focuses solely on online conversations that reference or affect a potential traveller's perceptions.



5. Tourism Sentiment in Cape Town

- Cape Town's Tourism Sentiment score is considered average at 25, compared to the rest of the world. Close to 30% of online conversations were actively recommending or speaking positively about the destination and 3% were discouraging or speaking negatively about Cape Town. The remaining (68%) spoke about the destination from an indifferent or passive point of view.
- Over the period January to June 2021, the Tourism Sentiment in Cape Town was driven by positive conversations around beaches, restaurants and dining experiences, while the negative sentiments revolved around natural disasters and accommodation.
- The top three sentiment categories that emerged for Cape Town was outdoor activities, safety and destination services. As depicted in the figure below, conversations around all sentiment categories were positive, apart from safety which brought on a more negative tone. "Amenities + entertainment" was the category that achieved the highest score at 34.



KEY PERFORMANCE INDICATORS	CAPE TOWN		
Tourism Sentiment Score® ⑦	25 27978 Conversations Analyzed		
Global Tourism Sentiment Comparison ③	AVERAGE		
Emotional Tone of Conversation ③	Joy		
Topics Driving Positive Sentiment ③	Beaches Restaurant / Dining / Takeaway		
Topics Driving Negative Sentiment ⑦	Natural Disaster Accommodation		

		CAPE TOWN		
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment
▲ Outdoor Activities	=	25% • 1%	Joy	26 Average
▲ Safety	=	14% • 10%	Sadness	-12 Average
 Destination Services 	=	14% ▼ 2%	Joy	26 Average
▲ Food + Culinary	=	12% • 1%	Joy	31 Average
▲ Relaxation + Wellness	=	11% • 4%	Joy	32 Average
▲ Amenities + Entertainment	=	8% • 1%	Joy	<mark>34</mark> High
▲ Culture + History	=	8% <u>~</u> 1%	Joy	22 Average
▲ Access + Transportation	Ξ	8% ▼ 2%	Joy	11 Average

Source: TSI, 2021

6. Tourism Sentiment Index: COVID-19 Crisis Index

- At a glance, the below summary provides an indication of the current state of Cape Town as it relates to the COVID-19 crisis and in comparison to the Western Cape.
- Over 7,000 online conversations were analysed for the Western Cape and 3,611 specifically related to Cape Town.
- The overall emotional tone of conversations for both the Western Cape and Cape Town was sadness. The positive sentiments were specifically centered around medicine, treatments and technology, while the negative sentiments were driven by conversations around infections, mortality rate and regulations.

KEY PERFORMANCE INDICATORS	CAPE TOWN	WESTERN CAPE			
Crisis Sentiment Score ⑦	-103% 3611 Conversations Analyzed	9 7332 Conversations Analyzed			
Global Crisis Sentiment Comparison ②	AVERAGE	AVERAGE			
Emotional Tone of Conversation ②	Sadness	Sadness			
Topics Driving Positive Sentiment ⑦	Medicine / Treatment / Technology Tourists	Medicine / Treatment / Technology Tourists			
Topics Driving Negative Sentiment ②	Infection / Mortality Rate Regulations	Infection / Mortality Rate Regulations			

Source: TSI, 2021

6. Tourism Sentiment Index: COVID-19 Crisis Index

- By understanding what drives the conversations around COVID-19, tourism marketers in Cape Town can learn which perceptions is top of mind amongst their audiences.
- The figure depicted below indicates the current strengths of Cape Town and where it faces challenges as a tourism destination.
- The highest volume of conversations were centered around Health Services in Cape Town (60%) as well as in the Western Cape (64%). Travel was the second most common online conversation and ranked as the only category that revealed a more positive emotion (Joy) while sadness dominated amongst the remaining categories.

		CAPE TOWN		WESTERN CAPE			
CATEGORIES	VOLUME COMPARISON	Volume	Emotion	Sentiment	Volume	Emotion	Sentiment
▲ Health Services		60% <u>~</u> 15%	Sadness	1 Average	64% <u>~</u> 10%	Sadness	1 Average
▲ Travel	=	14% ▼ 7%	Joy	20 Average	10% ▼ 6%	Joy	20 Average
▲ Businesses	=	8% • 1%	Sadness	9 Average	8% ~ 0%	Sadness	12 Average
▲ Government / Politics	=	7% ▼ 4%	Sadness	6 Average	7% ▼ 3%	Sadness	5 Average
▲ Society	=	6% ▼ 2%	Sadness	16 Average	7% • 0%	Sadness	22 Average
▲ Finance / Economics	Ξ	5% ▼ 1%	Sadness	13 Average	4% ▼ 1%	Sadness	11 Average

Source: TSI, 2021

7. Acknowledgements

Acknowledgements and many thanks go to the following for supplying the data which made this publication possible and whose continued and unwavering support will sustain the forthcoming issues.

The participating indicators and attractions in Cape Town:

- · Kirstenbosch National Botanical Garden
- Table Mountain Aerial Cableway
- Robben Island
- · South African National Parks Board
- Table Mountain National Park
- V&A Waterfront
- · ACSA: Cape Town International Airport
- STR Global
- Tourism Sentiment Index (STI)

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