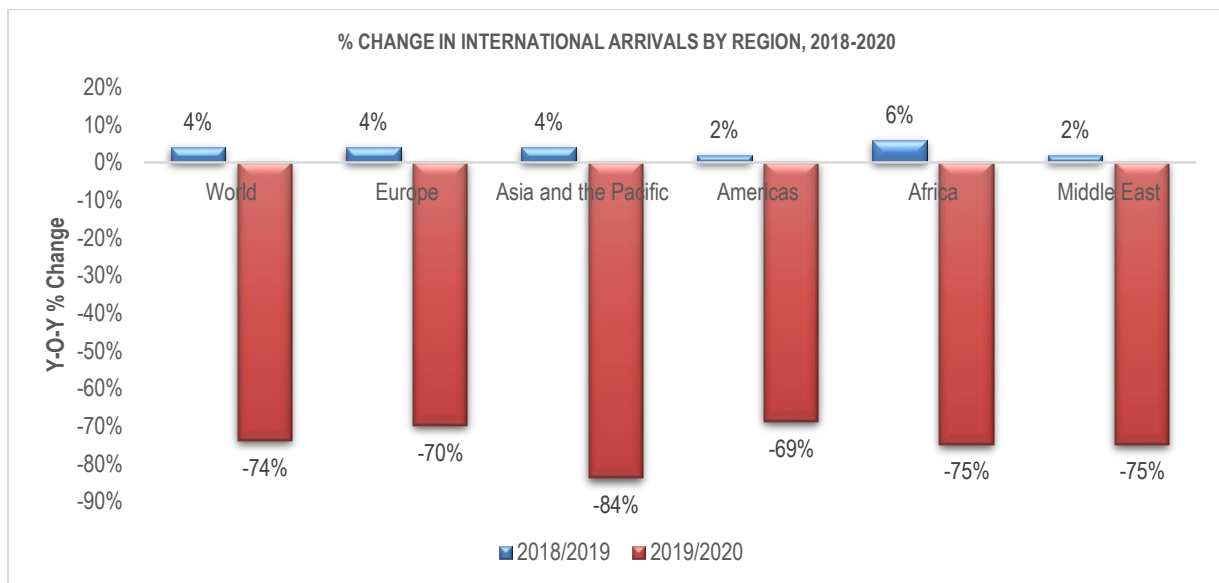


Western Cape Tourism Performance: 2020

1. Global Tourism Performance

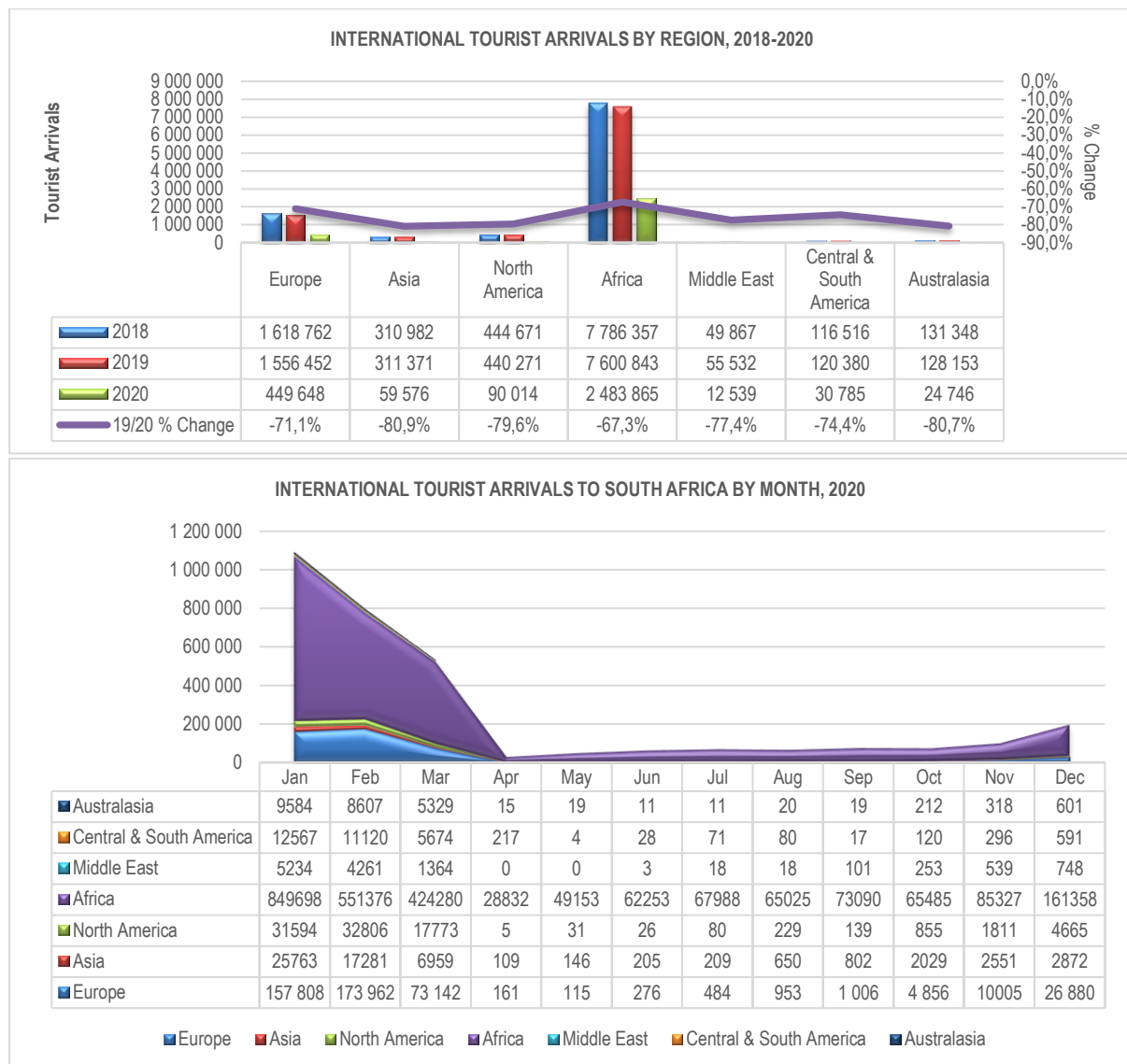
- The COVID-19 pandemic has caused a complete collapse in global travel in 2020, which resulted in an estimated loss of USD 1.3 trillion in export revenue. The United Nations World Tourism Organization (UNWTO) reports that the pandemic has placed at least 100 million direct tourism jobs at risk.
- International tourist arrivals (overnight visitors) declined by 74% over the period January - December 2020 when compared to the same period in 2019. This massive decline comes because of the dramatic fall in demand and worldwide travel restrictions.
- Asia and the Pacific, the first region to experience the impact of the pandemic, saw the biggest decline in arrivals (-84%), followed by the Middle East and Africa (both -75%).
- Stricter travel restrictions, safety concerns associated with travel, and the evolving nature of the pandemic were some of the factors that have caused a disruption in tourism in 2020. The gradual rollout of a COVID-19 vaccine is expected to help rebuild consumer confidence and ease travel restrictions.
- On the domestic front, tourism is gaining increasing interest along with a growing demand for open-air and nature-based tourism.



Source: United Nations World Tourism Organisation, 2021

2. South Africa: National Tourism Performance

- On 15 March 2020, the South African Government declared a national state of disaster in response to the COVID-19 pandemic. A nationwide lockdown came into effect on 26 March 2020, resulting in border closures and a complete standstill in tourism activity until 31 May 2020. In line with governments risk adjusted strategy, limited tourism activity was introduced as of 1 June 2020, and international borders re-opened on 1 October 2020. Since then, recovery has been very slow with international arrivals still 80% less in December than what they were in the same month in 2019.
- Foreign tourist arrivals reached 3.1 million in 2020 and decreased by 69.1% when compared to the previous year. Foreign arrivals in January and February were on an upward trend (+1.5% year-on-year) but plummeted in March due to worldwide travel restrictions brought on by the COVID-19 pandemic. Between October and December 2020, growth from the European and North American regions has been most promising, increasing by 454% and 446% respectively. Tourist arrivals from the rest of Africa have remained the most consistent throughout the year and the figure has doubled from November to December 2020.
- The biggest decline in international arrivals to South Africa came from the Asian market (-80.9%) followed by Australasia (-80.7%) and North America (-79.6%).

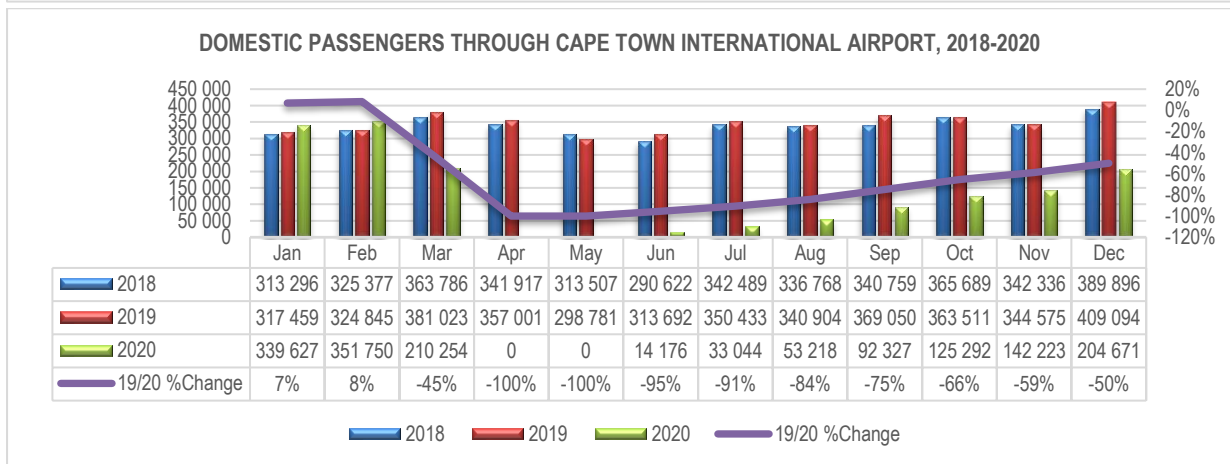
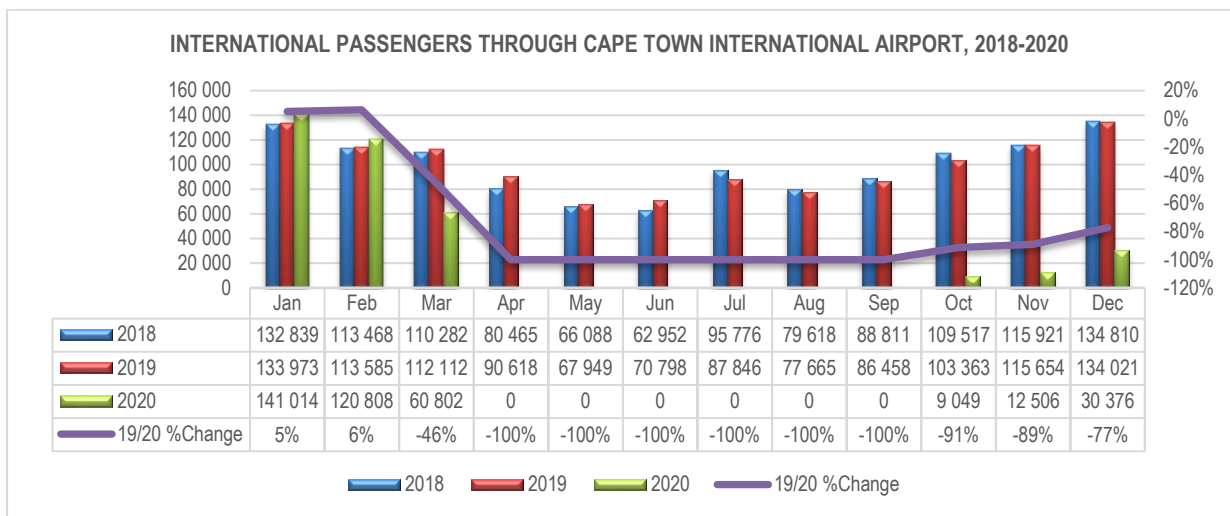


Source: Stats SA, 2021

3 Western Cape Tourism Performance

3.1 CTIA Passenger Arrivals

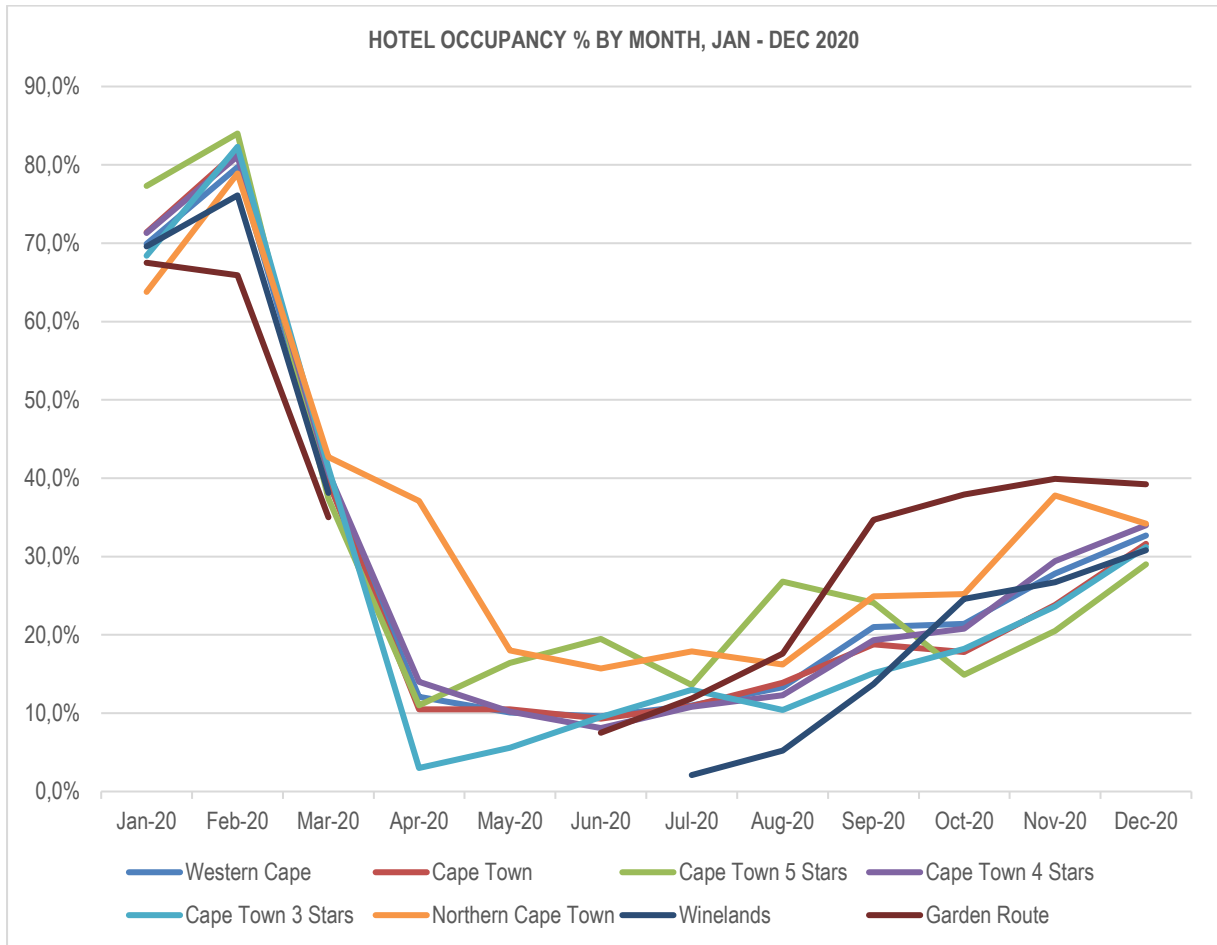
- International arrivals through Cape Town International Airport (CTIA) decreased by 68.6% in 2020, reaching a total of 374 555 passengers compared to 1 194 042 over the same period in 2019. Due to border closures and travel restrictions, there were no international arrivals from April to September 2020.
- Domestic arrivals declined by 62.4% year-on-year in 2020 compared to 2019. Limited domestic air travel was introduced in a phased approach at lockdown Level 3, which came into effect on 1 June 2020. Domestic arrivals reached 204 671 in December 2020, a 50% decline when compared to the same period in 2019.



Source: Airports Company South Africa, 2020

3.2 Hotel Occupancy

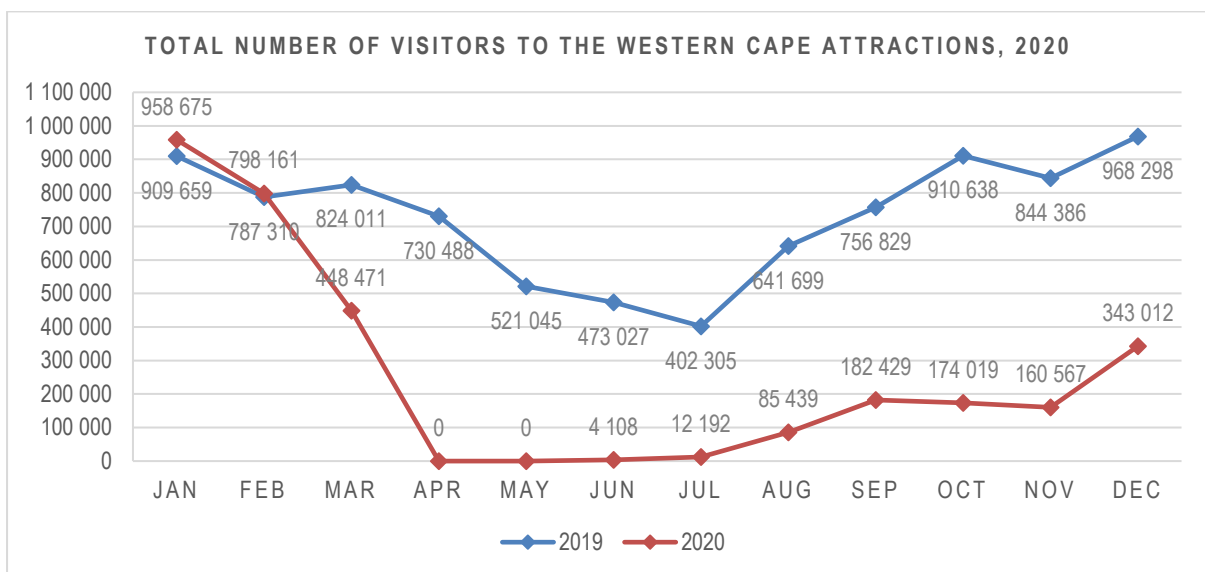
- The first two months of 2020 showed promising growth for the Western Cape, with 70% and 80% occupancy in January and February respectively.
- Since March, however, as a result of travel restrictions implemented to contain the COVID-19 pandemic, occupancy levels decreased to around 40% in March and continued on a downward spiral into June (9.6% occupancy). Recovery was slow over the remaining months reaching 32.7% occupancy in December.
- As at December 2020, the year to date occupancy percentage in the Western Cape reached 34.9% compared to 64.1% over the same period in 2019. Revenue per average room was R573.56, compared to R1046 in 2019.



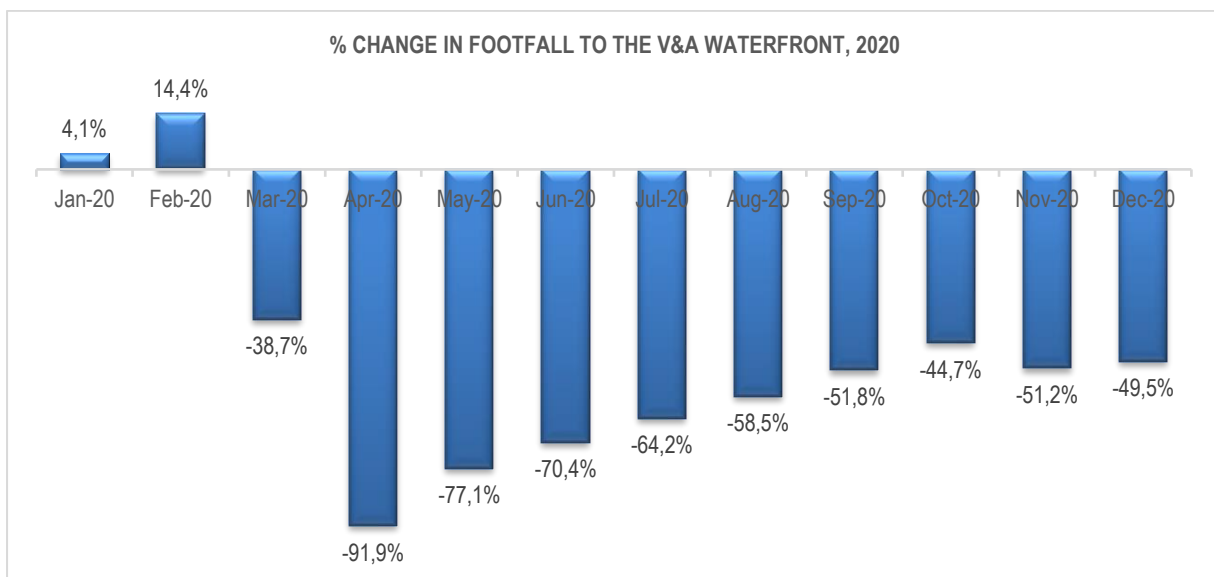
Source: STR Global, 2020

3.3 Western Cape Attractions

- All major tourist attractions in the province were closed from mid-March to the end of May 2020, due to COVID-19 lockdown restrictions, resulting in sharp declines in visitor numbers when compared to 2019.
- The participating Western Cape Attractions received 2 205 307 visitors over the period January to March 2020, and 4 108 visitors were recorded for the second quarter of 2020 due to the nationwide lockdown. Visitors to participating attractions continued to increase during the third (280 060 visitors) and fourth (677 598 visitors) quarters of 2020.
- However, despite year-on-year growth in January (+5.4%) and February (+1.4%), visitor numbers to attractions from January to December 2020 showed an overall decline of -63.9% when compared to the same period in 2019.
- In addition, the V&A Waterfront, recorded year-on-year growth of 4.1% in January and 14.4% in February before falling to -38.7% in March and -91.9% in April 2020. With the ease of lockdown restrictions, visitor numbers recovered slowly over the remaining months ending with a year-on-year decline of 49.5% in December.



Source: SANParks, LTO's, and Attractions, 2020



TOTAL NUMBER OF VISITORS BY PARTICIPATING REGIONAL ATTRACTION			
ATTRACTIONS	2019	2020	Y-O-Y % Change
Cape Town			
Kirstenbosch Botanical Gardens	921 421	489 367	-46,9%
Robben Island	315 821	97 034	-43,1%
Table Mountain National Park	3 164 464	977 862	-48,4%
Table Mountain National Park: Boulders	820 351	243 410	-48,5%
Table Mountain National Park: Cape of Good Hope	1 135 894	363 647	-47,9%
Table Mountain Aerial Cableway	1 099 615	384 183	-51,8%
Cape Overberg			
Agulhas National Park	40 550	10 330	-74,5%
Bontebok National Park	22 466	12 654	-43,7%
De Hoop Nature Reserve	21 751	7 665	-64,8%
De Mond Nature Reserve	7 170	5 079	-29,2%
Harold Porter National Botanical Gardens	43 394	27 021	-37,7%
Kogelberg Nature Reserve	6 858	6 798	-0,9%
Stony Point	85 694	18 053	-78,9%
Cape Agulhas Lighthouse	34 562	7 505	-78,3%
Garden Route			
Cango Caves	237 129	61 481	-74,1%
Wilderness National Park	113 933	66 200	-41,9%
Tsitsikamma National Park	345 098	129 287	-62,5%
Knysna National Park	32 968	21 094	-36,0%
WESKUS			
!Khwattu	19 022	9 741	-48,8%
Old Jail	6 662	4 798	-28,0%
West Coast National Park	263 446	205 326	-22,1%
Cape Karoo			
Karoo National Park	31 426	18 538	-41,0%

Sources: SANParks, LTO's, and Attractions, 2020

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