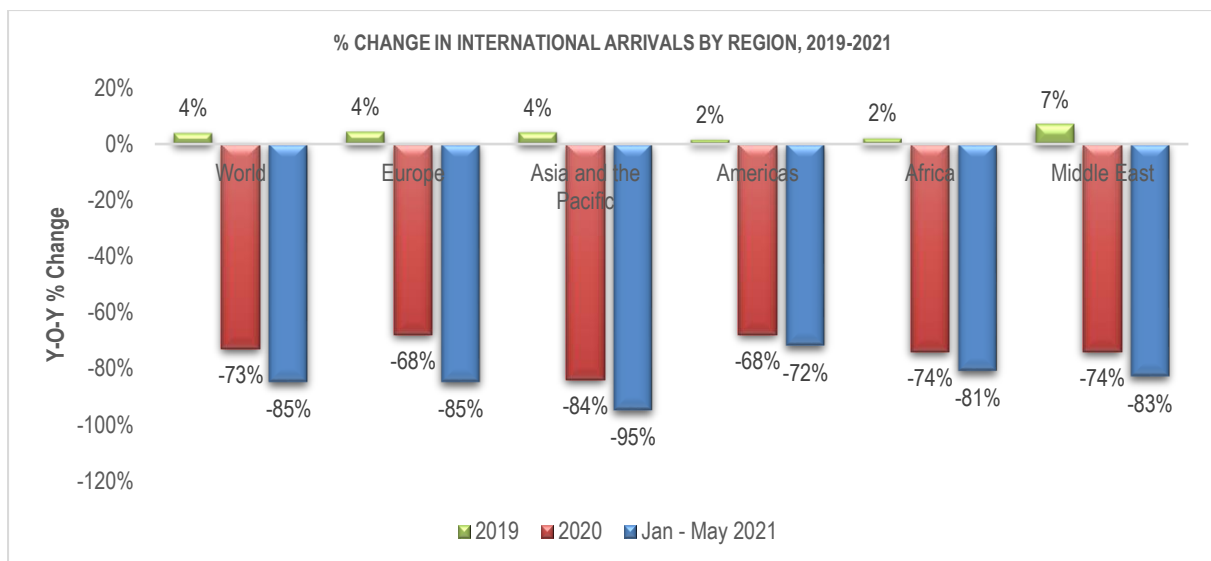


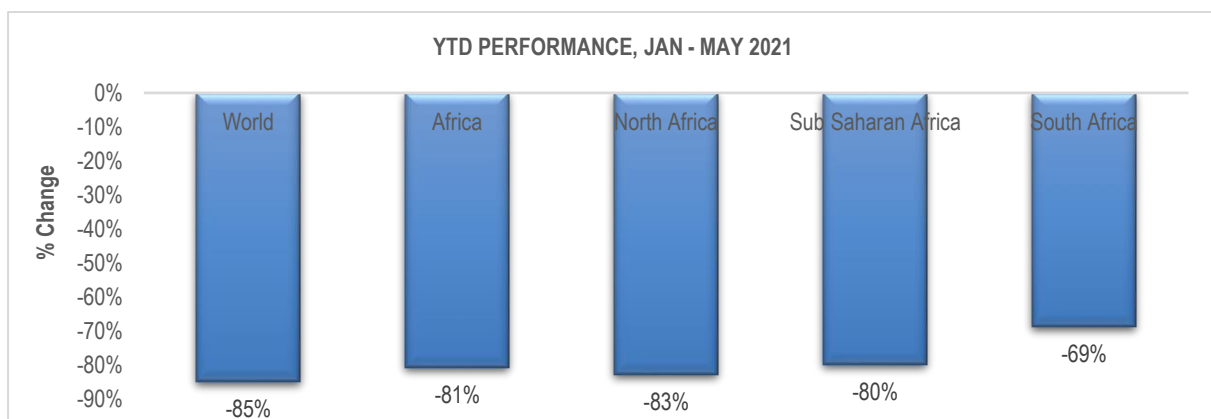
Western Cape Tourism Performance: January – June 2021

1. Global Tourism Performance

- According to the United Nations World Tourism Barometer, international tourist arrivals (overnight visitors) declined by 85% over the period January-May 2021 when compared to the same period in 2019. This massive decline comes because of continued travel restrictions globally in an attempt to contain the spread of the COVID-19 pandemic.
- Asia and the Pacific, the first region to experience the impact of the pandemic, saw the biggest decline in arrivals (-95%), followed by Europe (-85%), the Middle East (-83%), Africa (-81%) and the Americas (-72%).
- Though at negative levels, South Africa performed better when compared to the world average as well as North Africa, Sub Saharan Africa and the African continent as a whole.
- As expected, domestic tourism is driving tourism recovery in many destinations. China and Russia have already exceeded pre-COVID levels in domestic air seat capacity
- Tourism recovery relies on countries to communicate effectively on the easing of travel restrictions, harmonizing safety protocols along with ongoing vaccination rollouts.



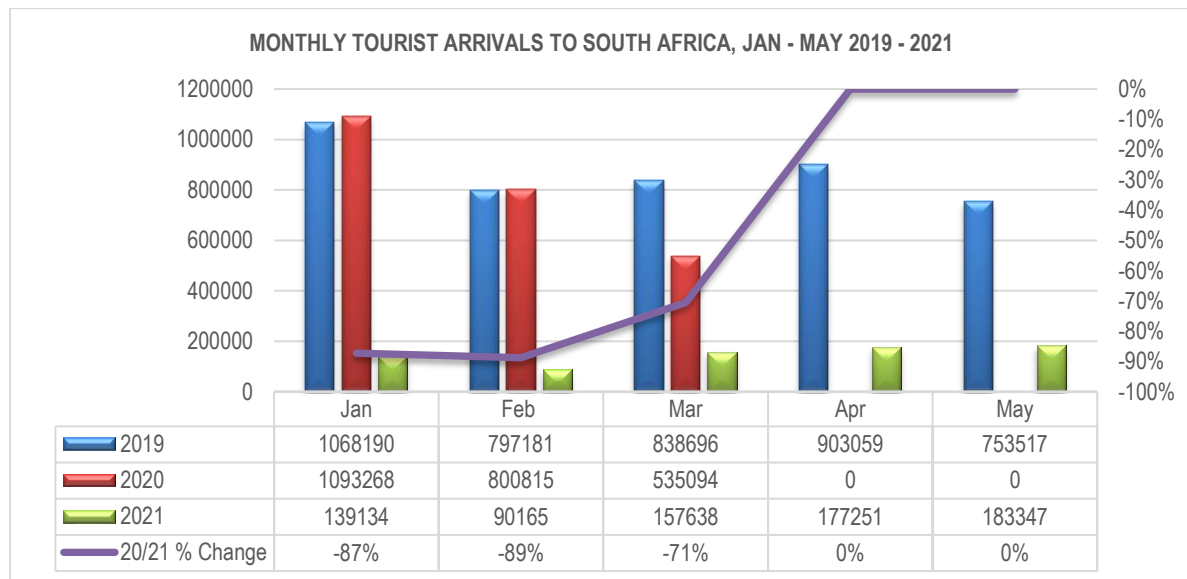
Source: United Nations World Tourism Organisation, 2021



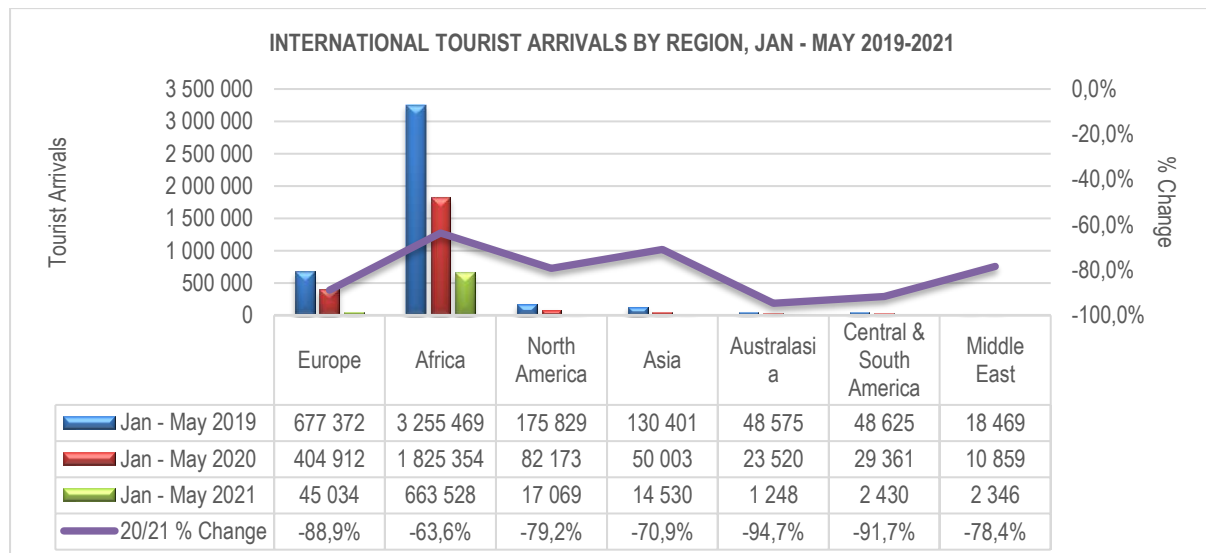
Source: United Nations World Tourism Organisation, 2021

2. South Africa: National Tourism Performance

- Foreign tourist arrivals reached 747 535 million in the first five months of 2021 and decreased by 69.2% when compared to the same period in 2020. Tourist arrivals from overseas markets remain at low levels but have increased steadily since March 2021 and May has been the best performing month for the year thus far (South African Tourism, 2021).
- The biggest decline in international arrivals to South Africa came from the Australasian market (-94.7%), followed by Central & South America (-91.7%) and Europe (-88.9%).
- Travel from African markets (663 528) was the biggest source of tourist arrivals to South Africa in the first five months of 2021 and represented the smallest decline (63.6%).



Source: Stats SA, 2021

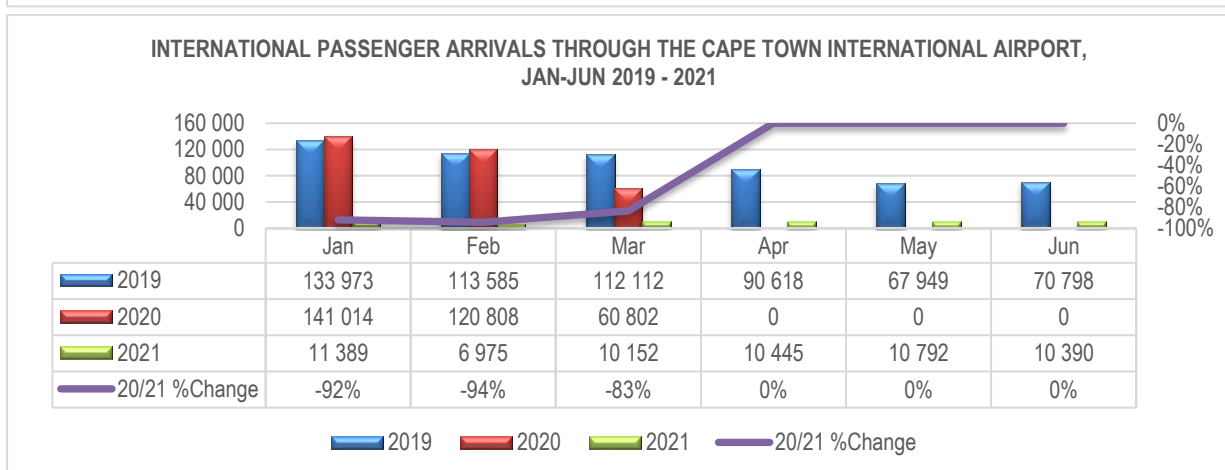
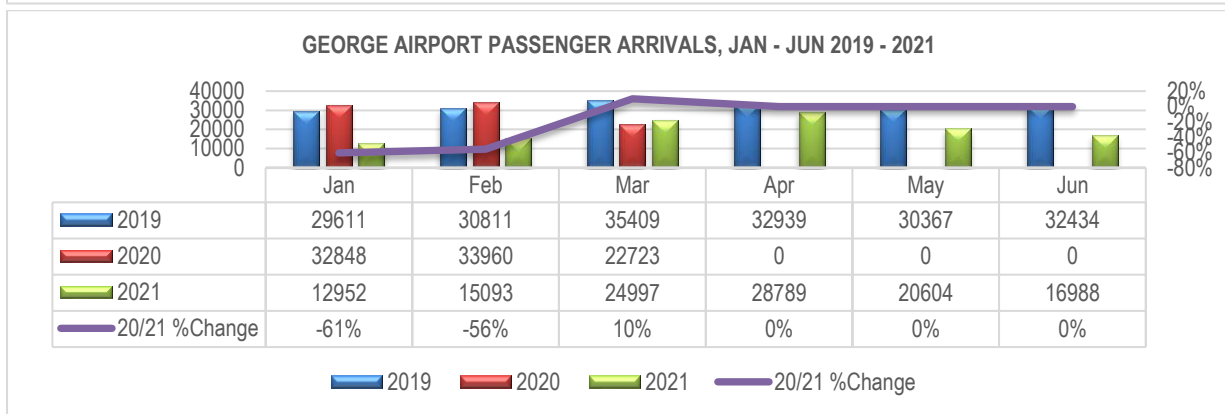
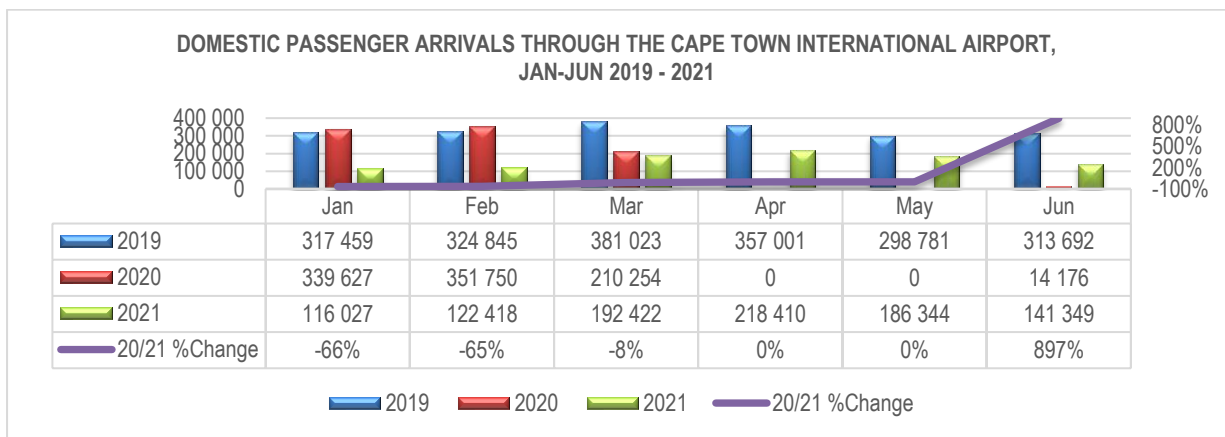


Source: Stats SA, 2021

3 Western Cape Tourism Performance

3.1 Airport Arrivals

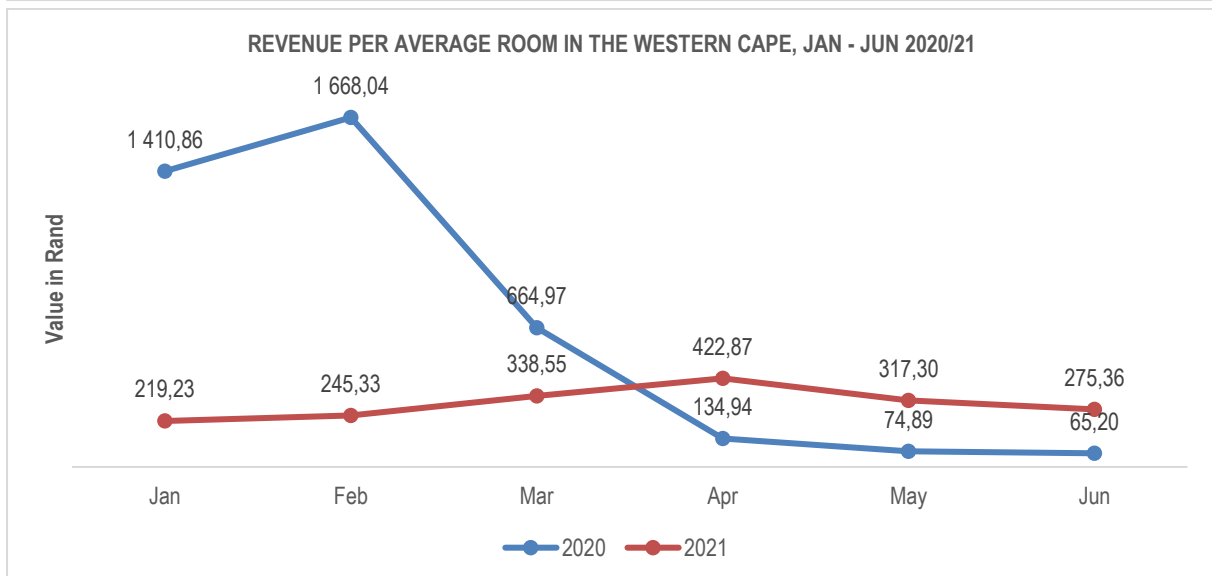
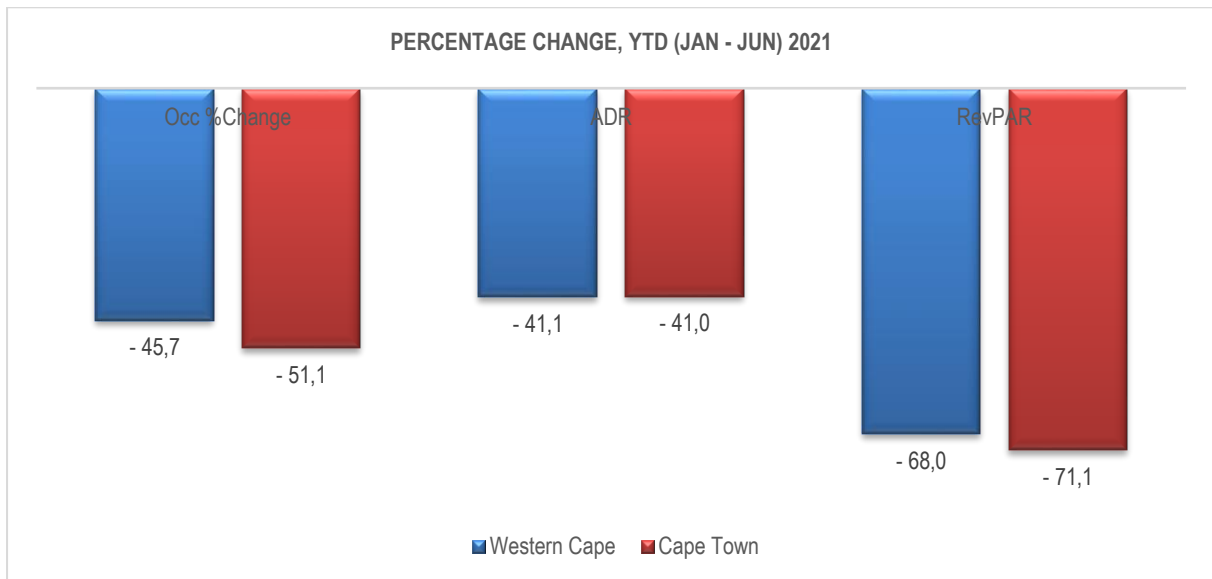
- Domestic arrivals through Cape Town International Airport grew by 6.7% y-o-y in the first half of 2021 compared to the same period in 2020 and reached its peak at 218 410 passengers in April 2021. Y-o-y growth of 897% in June is because of hard lockdown measures having only eased since June 2020.
- Domestic arrivals at George Airport grew by 33.4% y-o-y in the first half of 2021 compared to the same period in 2020 and reached its peak at 28 789 passengers in April 2021.
- 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. This heavy decline can be attributed to hard lockdown regulations which caused restrictions on international arrivals between April and October 2020.



Source: Airports Company South Africa, 2021

3.2 Hotel Occupancy

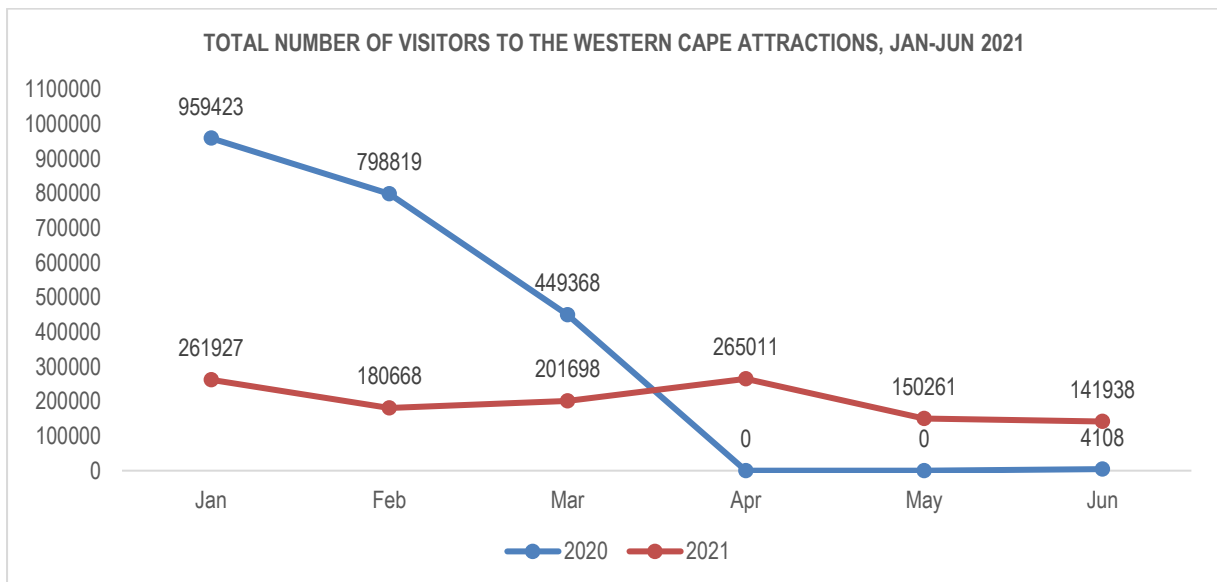
- As at June 2021, the year to date occupancy percentage in the Western Cape reached 27.7% compared to 51% over the same period in 2020 (a decline of 45.7%). Revenue per average room (RevPAR) declined by 68% going from R977.36 to R312.93.
- For Cape Town, the year to date occupancy percentage was 26.1% compared to 53.3% in 2020 (51.1% decline) and revenue per average room was R324.15 compared to R1,121.58 in 2020 (71.1% decline).
- The Average Daily Rate (ADR) for both the Western Cape and Cape Town declined by 41%, going from R1,915.91 to R1,128.79 and R2,103.72 to R1,242.20 respectively.
- RevPAR was slightly higher from April to June 2021 compared to the same time in 2020, given that the country was in Lockdown Level 5 over that period the previous year.



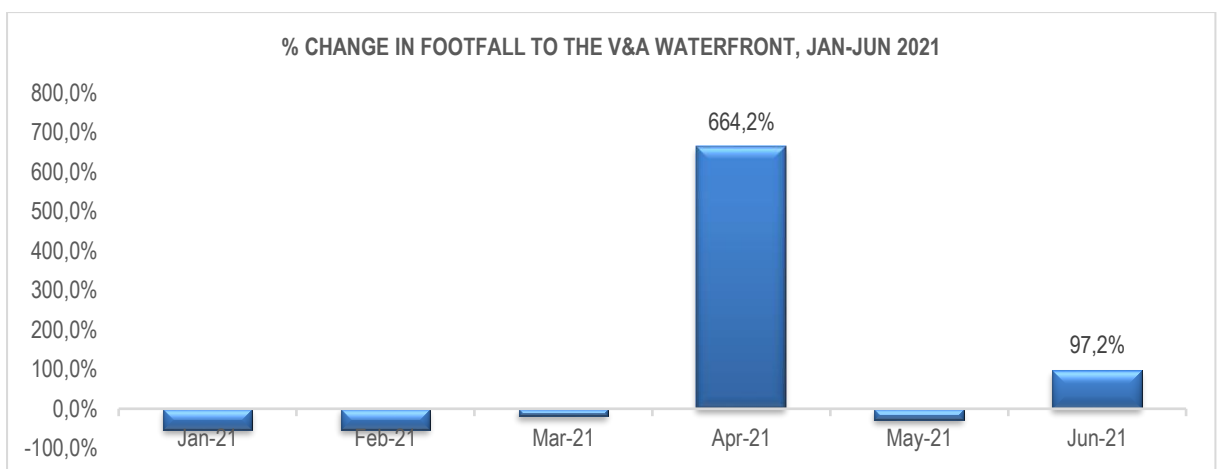
Source: STR Global, 2021

3.3 Western Cape Attractions

- The participating Western Cape Attractions received 1 201 503 visitors over the period January to June 2021, a 45.7% decline when compared to the same period in 2020.
- Visitor numbers were significantly higher in the second quarter, due to the Level 5 Lockdown restriction over that period in 2020 which saw all attractions closed in April and May and slowly re-opening in June 2020.
- In addition, the V&A Waterfront, recorded year-on-year growth of 664.2% in April and 97.2% in June 2021. The more positive performance experienced in April was driven by the Easter weekend, public and school holidays. 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 due to the reduction in trading hours, rainy weather, and lack of school holidays (V&A Waterfront, 2021).
- Knysna National Park (128.4%), Old Jail (123.9%), Harold Porter National Botanical Gardens (76.3%) and Karoo National Park recorded the highest growth in visitor numbers when compared to the previous year.



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



Source: V&A Waterfront, 2021

TOTAL NUMBER OF VISITORS BY PARTICIPATING REGIONAL ATTRACTION			
ATTRACTIONS	JAN - JUN 2020	JAN - JUN 2021	Y-O-Y % Change
Cape Town			
Kirstenbosch Botanical Gardens	252 257	252 485	0,1%
Robben Island	86 087	17 429	-79,8%
Table Mountain National Park	803 170	370 342	-53,9%
Table Mountain National Park: Boulders	207 585	58 471	-71,8%
Table Mountain National Park: Cape of Good Hope	277 690	126 854	-54,3%
Table Mountain Aerial Cableway	272 490	111 619	-59,0%
Cape Overberg			
Cape Agulhas Lighthouse	7 505	1 279	-83,0%
Agulhas National Park	8 773	2 752	-68,6%
Bontebok National Park	5 444	7 236	32,9%
De Hoop Nature Reserve	5 003	5 513	10,2%
De Mond Nature Reserve	2395	2 962	23,7%
Harold Porter National Botanical Gardens	11 422	20 139	76,3%
Kogelberg Nature Reserve	2354	2 889	22,7%
Stony Point	17 076	*3208	-81,2%
Shipwreck Museum	1728	886	-48,7%
Garden Route			
Cango Caves	47 621	17 809	-62,6%
Wilderness National Park	33 911	41 399	22,1%
Tsitsikamma National Park	85 414	55 365	-35,2%
Knysna National Park	7 546	17 232	128,4%
WESKUS			
!Khwattu	4 367	5 075	16,2%
Old Jail	587	1 314	123,9%
West Coast National Park	64 695	67 684	4,6%
Cape Karoo			
Karoo National Park	6 598	11 561	75,2%

* Available Data for Stony Point up to April 2021 only
Sources: SANParks, LTO's, and Attractions, 2021

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