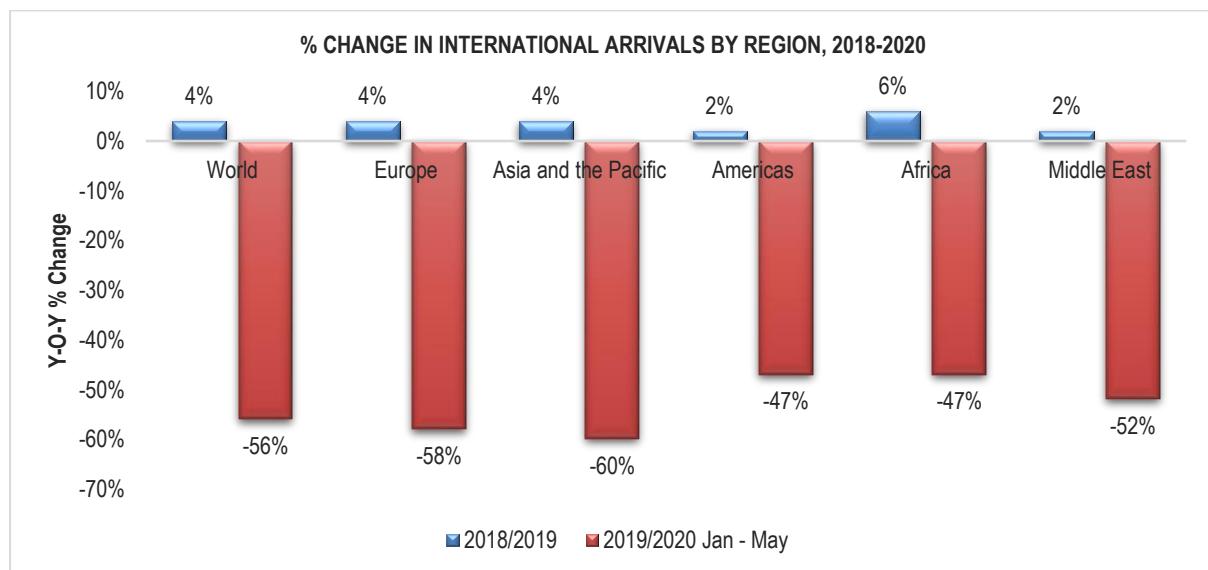


Western Cape Tourism Performance: January – June 2020

1. Global Tourism Performance

- The COVID-19 pandemic has caused a complete collapse in global travel during the first half of 2020. International arrivals declined by 97% in April and 98% in May, due to worldwide travel restrictions. As of 15 June, travel restrictions had started to ease in the Northern Hemisphere with Europe leading the way. The outlook, however, is still highly uncertain as new cases of COVID-19 continue to be reported globally.
- International tourist arrivals (overnight visitors) declined by 56% over the period January-May 2020 when compared to the same period in 2019. This massive decline comes as a result of travel restrictions in nearly all countries 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 (-60%), followed by Europe (-58%), the Middle East (-52%), the Americas and Africa (both -47%).
- Border closures and travel restrictions, safety concerns associated with travel, the resurgence of the virus and risks of new lockdowns or curfews are some of the factors that have weighed heavily on growth in international tourism.
- Domestic tourism is expected to resume faster as changes are seen in consumer behaviour. Many travellers are taking trips closer to home, booking closer to their departure date and prefer to travel by car.



Source: United Nations World Tourism Organisation, 2020

2. South Africa: National Tourism Performance

- Foreign tourist arrivals reached 2.4 million in the first quarter of 2020 and decreased by 10.2% when compared to the same period in 2019. 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.
- The total foreign direct spend in South Africa reached R19.4 billion in Q1 2020 declining by 24.0% year-on-year, and tourists' average spend in South Africa decreased by 14.1% to reach R8,400.
- On 15 March 2020, the South African Government declared a national state of disaster in response to the coronavirus 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, however international borders remain closed until 30 September 2020. No international tourism activity was thus recorded for Q2 2020.
- The biggest decline in international arrivals to South Africa came from the Asian market (-33.7%), followed by North America (-19.8%) and Europe (-13.4%).

International Tourism Indicators	Q1 2017	Q1 2018	Q1 2019	Q1 2020	19/20 y-o-y % change
Total number of tourist arrivals	2.6 million	2.8 million	2.7 million	2.4 million	-10.2%
Total foreign direct spend (excl capital expenditure) from tourists	R19.0 billion	R20.7 billion	R25.7 billion	R19.4 billion	-24.0%
Average spend in South Africa per foreign tourist	R7,800	R7,900	R9,900	R8,400	-14.1%

Source: South African Tourism, 2020

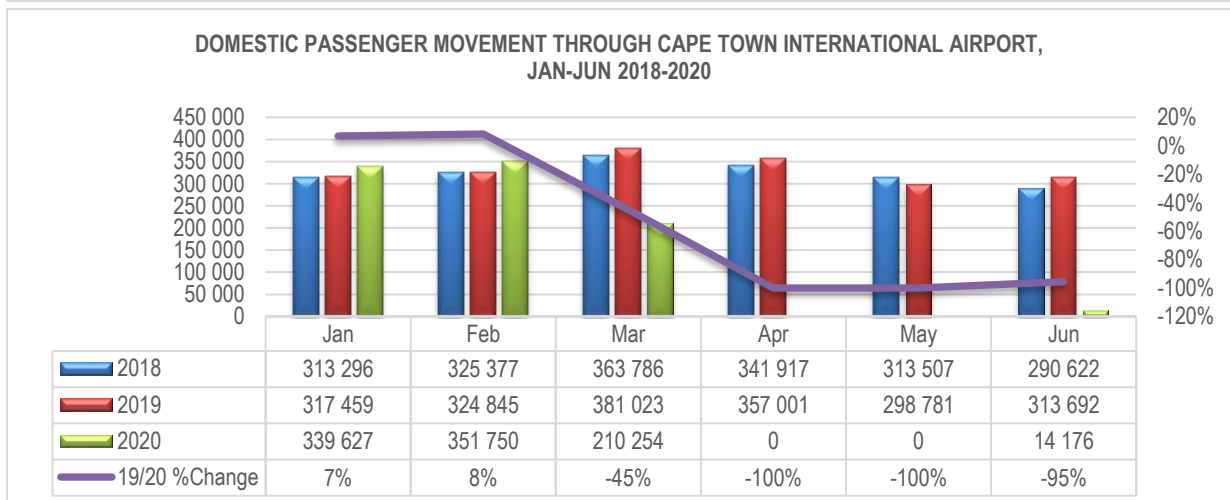
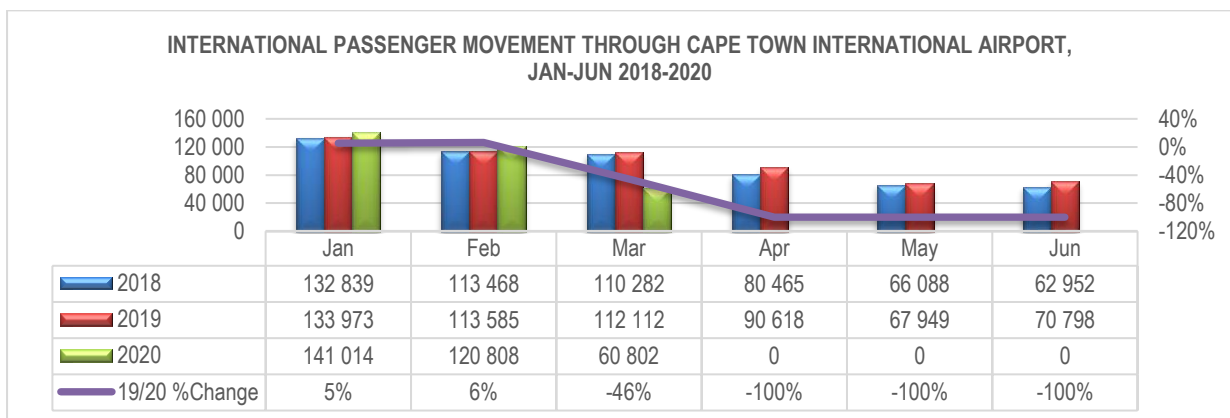


Source: South African Tourism, 2020

3 Western Cape Tourism Performance

3.1 CTIA Passenger Arrivals

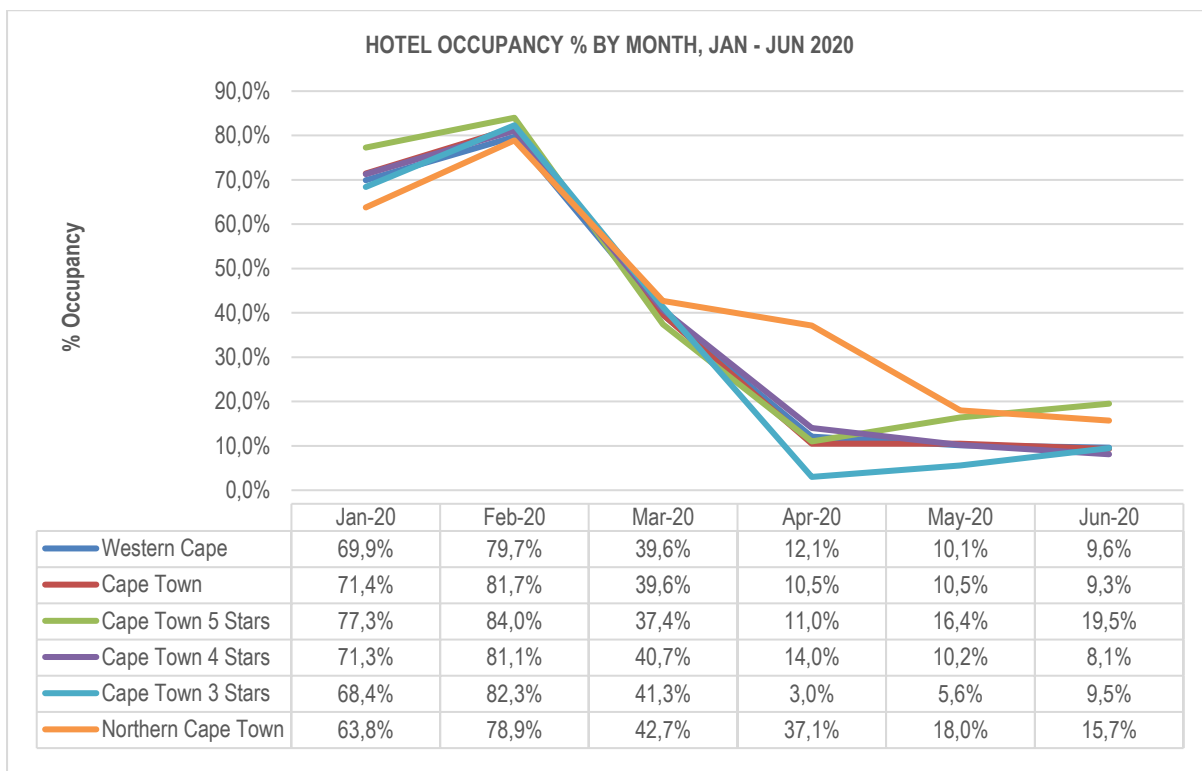
- International arrivals through Cape Town International Airport (CTIA) decreased by 10.3% in Q1 2020, reaching a total of 322 624 passengers compared to 359 670 over the same period in 2019. No international arrivals were seen throughout Q2 2020, due to border closures and travel restrictions.
- Domestic arrivals declined by 11.9% y-o-y in Q1 2020 and decreased further by 98.5% in Q2 2020 compared to the same period in 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 14 176 in June 2020, a 95% decline when compared to the same period in 2019.
- For the period January to June, international arrivals decreased by 45.2% and domestic arrivals declined by 54.0%. The nationwide lockdown and travel restrictions are the main factors which contributed to the massive declines in visitor arrivals during this period.



Source: Airports Company South Africa, 2020

3.2 Hotel Occupancy

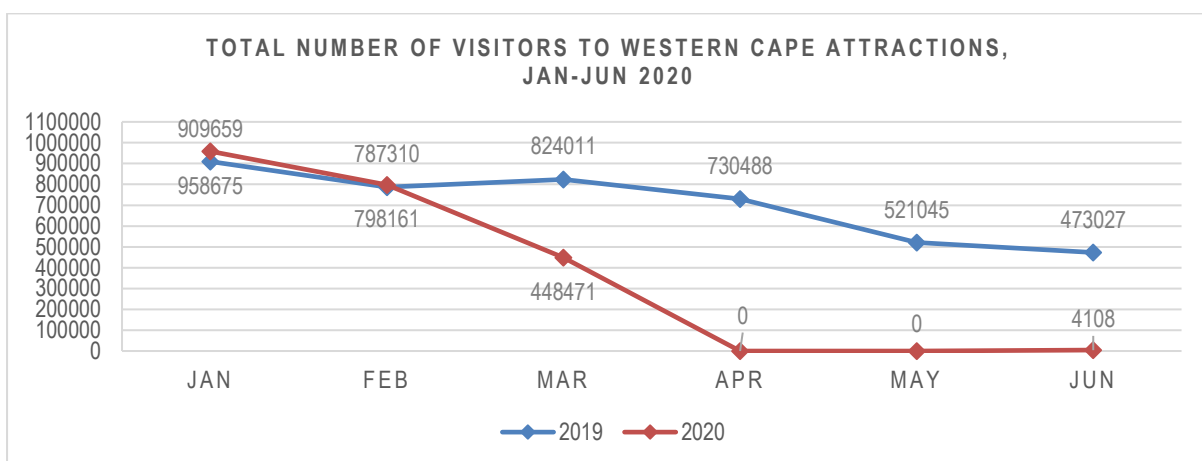
- The first two months of 2020 showed promising growth for the Western Cape, with 70% and 80% occupancy in January and February respectively.
- Since March, however, as a result of travel restrictions implemented to contain the COVID-19 pandemic, occupancy levels decreased to around 40% in March and continued on a downward spiral into June (9.6% occupancy).
- As at June 2020, the year to date occupancy percentage in the Western Cape reached 48.2% compared to 63.2% over the same period in 2019. Revenue per average room was R916.89, compared to R1053.30 in 2019.



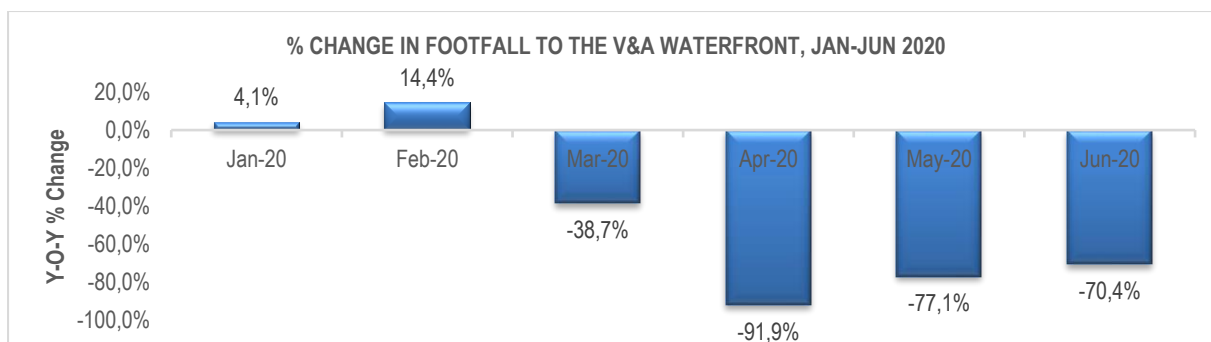
Source: STR Global, 2020

3.3 Western Cape Attractions

- All attractions 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 2 200 504 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.
- Despite year-on-year growth in January (+5.2%) and February (+1.1%), visitor numbers to attractions from January to June 2020 show an overall decline of -48.0% 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 seem to be recovering slowly in May (-77.1%) and June (-70.4%).



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



TOTAL NUMBER OF VISITORS BY PARTICIPATING REGIONAL ATTRACTION			
ATTRACTIONS	JAN - JUN 2019	JAN - JUN 2020	Y-O-Y % Change
Cape Town			
Kirstenbosch Botanical Gardens	460 857	252 257	-45,3%
Robben Island	151 354	86 087	-43,1%
Table Mountain National Park	1 556 527	803 170	-48,4%
Table Mountain National Park: Boulders	402 847	207 585	-48,5%
Table Mountain National Park: Cape of Good Hope	532 578	277 690	-47,9%
Table Mountain Aerial Cableway	565 050	272 490	-51,8%
Cape Overberg			
Agulhas National Park	17 957	8 773	-51,1%
Bontebok National Park	9 822	5 444	-44,6%
De Hoop Nature Reserve	7 382	5 003	-32,2%
De Mond Nature Reserve	4012	2 395	-40,3%
Harold Porter National Botanical Gardens	20 162	11 422	-43,3%
Kogelberg Nature Reserve	2920	1 779	-39,1%
Stony Point	32 352	17076	-47,2%
Garden Route			
Cango Caves	107 045	47 621	-55,5%
Wilderness National Park	56 096	33 911	-39,5%
Tsitsikamma National Park	150 575	85 414	-43,3%
Knysna National Park	15 705	7 546	-52,0%
WESKUS			
!Khwattu	8 360	4 367	-47,8%
Old Jail	1 996	587	-70,6%
West Coast National Park	112 239	64 695	-42,4%
Cape Karoo			
Karoo National Park	14 090	6 598	-53,2%

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

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