

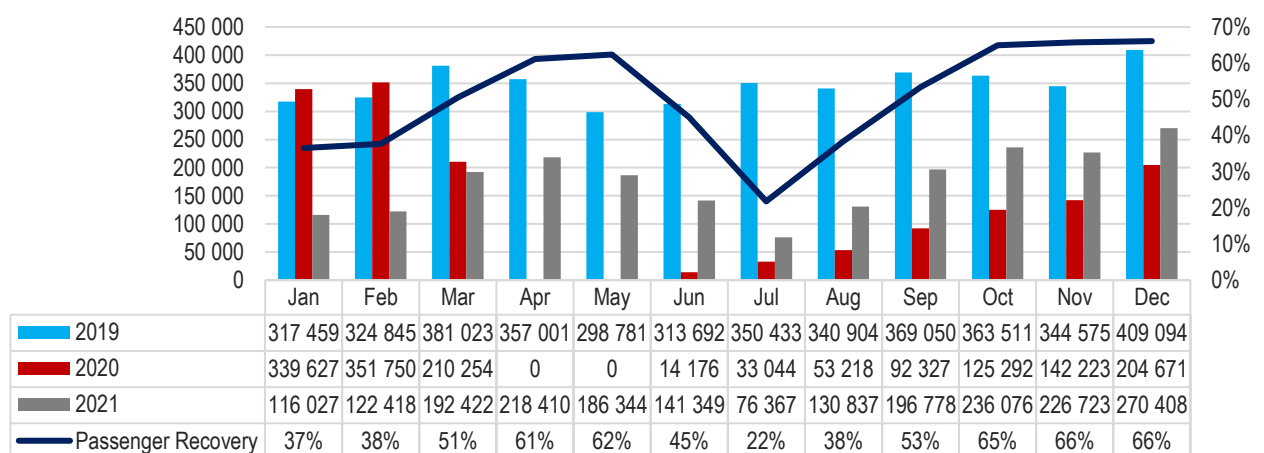
Western Cape Tourism Recovery: Annual 2021

Nearly two years into the COVID-19 pandemic, the tourism industry continues to feel its impact. This report aims to measure tourism recovery in the Western Cape over the period January to December 2021, by comparing it to tourism figures over the same period in 2019.

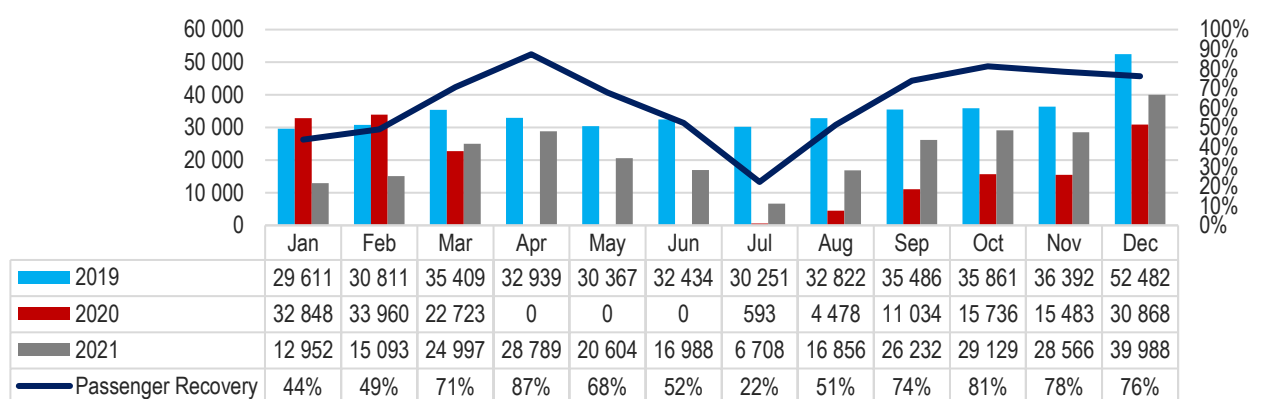
1. Cape Town International Airport (CTIA) Passenger Movement

- Since the beginning of the pandemic, passenger arrivals through Cape Town International Airport **domestic** terminal were highest in December 2021 with 270 408 passengers, representing a 66% recovery rate when compared to the same period in 2019. Recovery was slow at the start of the year and gained traction in March, climbing to 62% recovery in May. However, recovery slowed down in June and continued declining in July as the third wave of COVID-19 infections hit the country. Despite this setback, domestic arrivals recovered quickly with passenger arrivals doubling in August and continuing on an upward trajectory in September through to December.
- George Airport saw its peak of domestic arrivals in December (39 988) but April was the best month in terms of recovery (87%) when compared to the same month in 2019.

Cape Town International Airport DOMESTIC passenger arrivals, JAN - DEC 2019 - 2021

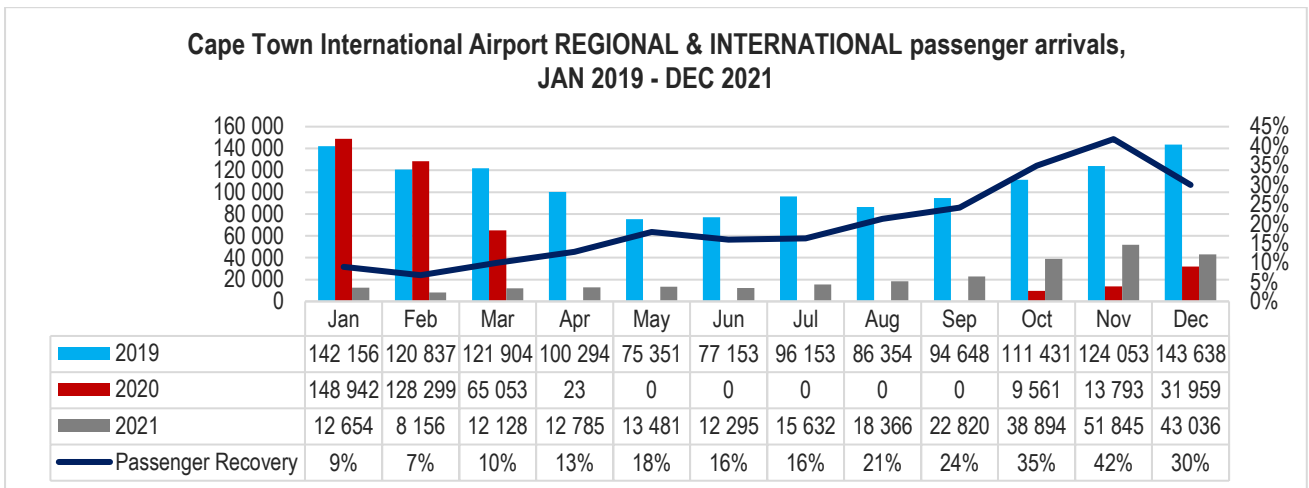


George Airport DOMESTIC passenger arrivals, JAN - DEC 2019 - 2021

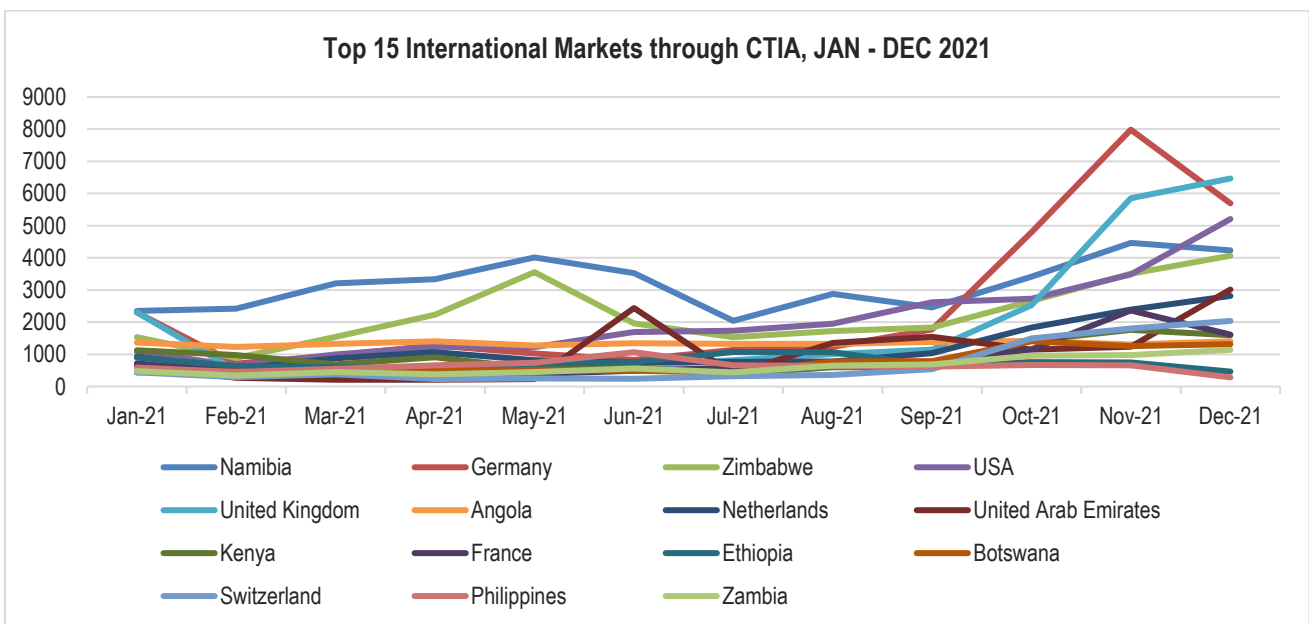


Source: Airports Company South Africa, 2022

- International and regional passenger arrivals, reached its peak in November (51 845) with a 42% recovery rate but growth halted as travel bans ensued due to the emergence of the Omicron variant.
- Germany has remained one of the province's top international source markets, while other European markets have declined significantly. The UK and Germany saw sharp declines since the start of the pandemic and remained low until August 2021 except for high volumes over the November 2020 to January 2021 festive period. September 2021, however, brought a glimmer of hope as Germany and the UK ranked 4th and 7th in terms of arrivals from international markets after the removal of their respective travel bans, and in October and November these two countries were the top international source markets for the province. This upward trend was briefly disrupted with the emergence of the Omicron variant, however, the UK and Germany remained the top two source markets in December as well.
- African markets like Namibia, Zimbabwe, Kenya Angola, Botswana, Ethiopia, and Zambia have recovered more steadily, although the numbers are smaller. Visitor arrivals from Ethiopia, in particular, exceeded their Jan - Dec figure by more than 50% over the same period in 2019 (albeit off a low base).
- Arrivals from the USA had a slow start to 2021 but rose significantly since June and became the top international market through CTIA in September – their traditional travel season to Southern Africa. As with the European markets, the USA has lifted travel restrictions to South Africa due to the Omicron variant, which will certainly aid recovery in this market.



Source: Airports Company South Africa, 2022



Source: OAG Traffic Analyser, 2022

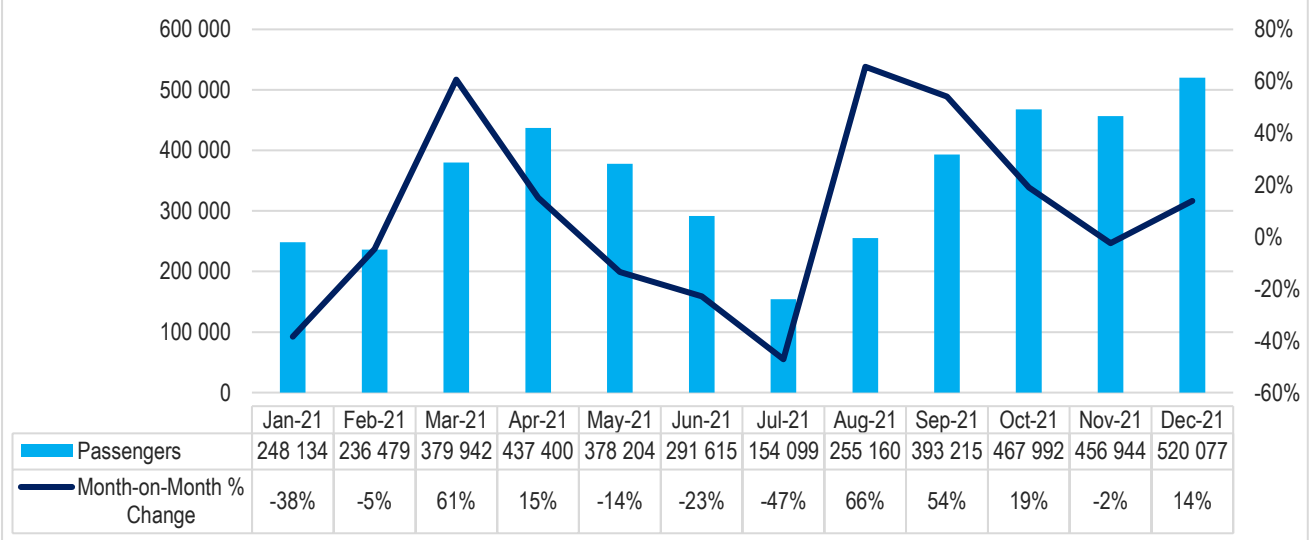
TOP INTERNATIONAL SOURCE COUNTRIES TO THE WESTERN CAPE THROUGH CTIA: 2019 - 2021

RANK	SOURCE COUNTRY	JAN - DEC 2019	JAN - DEC 2020	JAN - DEC 2021	RECOVERY %
1	Namibia	81 477	28 515	38 364	47%
2	Germany	232 832	93 649	29 761	13%
3	Zimbabwe	43 491	15 030	27 051	62%
4	USA	151 799	44 744	24 618	16%
5	United Kingdom	270 856	116 290	22 857	8%
6	Angola	45 343	16 568	16 122	36%
7	Netherlands	82 672	31 813	14 636	18%
8	United Arab Emirates	23 467	8 594	12 708	54%
9	Kenya	32 846	9 340	11 231	34%
10	France	75 736	22 356	10 045	13%
11	Ethiopia	5 871	4 076	8 929	152%
12	Botswana	21 853	6 576	8 795	40%
13	Switzerland	47 706	16 770	8 401	18%
14	Philippines	6 481	3 770	7 596	117%
15	Zambia	18 601	7 237	7 523	40%

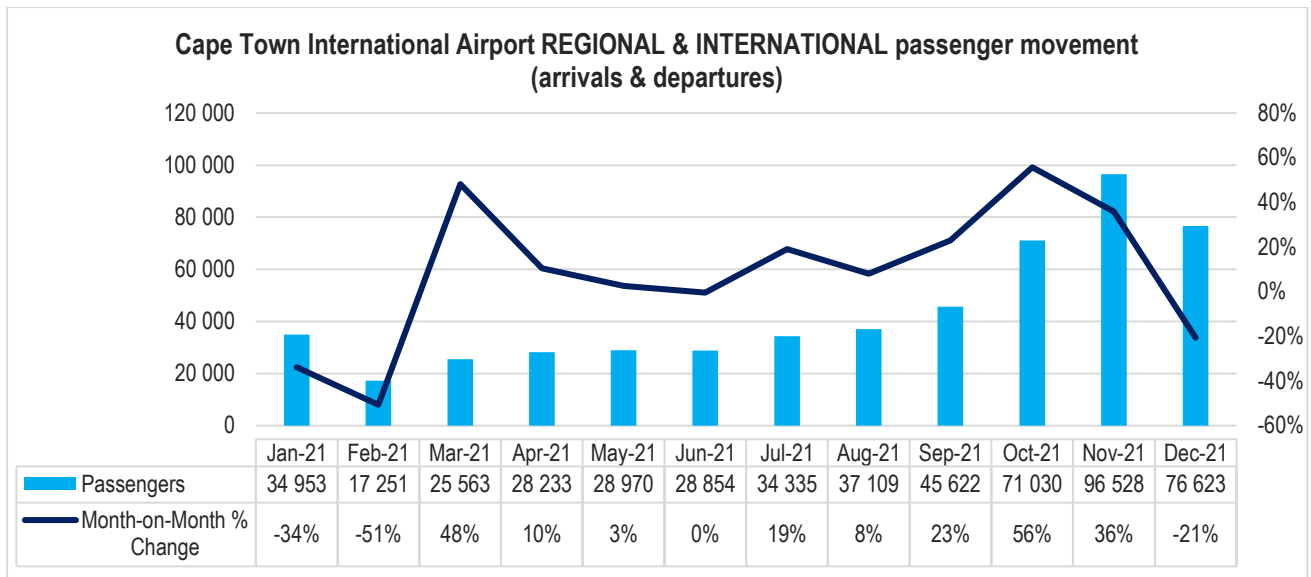
Source: OAG Traffic Analyser, 2021

- Passenger movement (arrivals and departures) increased sporadically through the domestic terminal at CTIA. A month-to-month comparison reveals a peak in growth in March, and again in August and September 2021, which coincides with the easing of lockdown restrictions after the second and third waves. Domestic arrivals and departures has seen quicker recovery than international passenger movement.
- However, unlike domestic arrivals and departures, international passenger movement was not heavily impacted by the second and third waves of COVID-19 infections. Passenger movement through CTIA's international airport grew steadily between August and November, but declined in December due to Omicron related travel bans.

Cape Town International Airport DOMESTIC passenger movement (arrivals & departures)



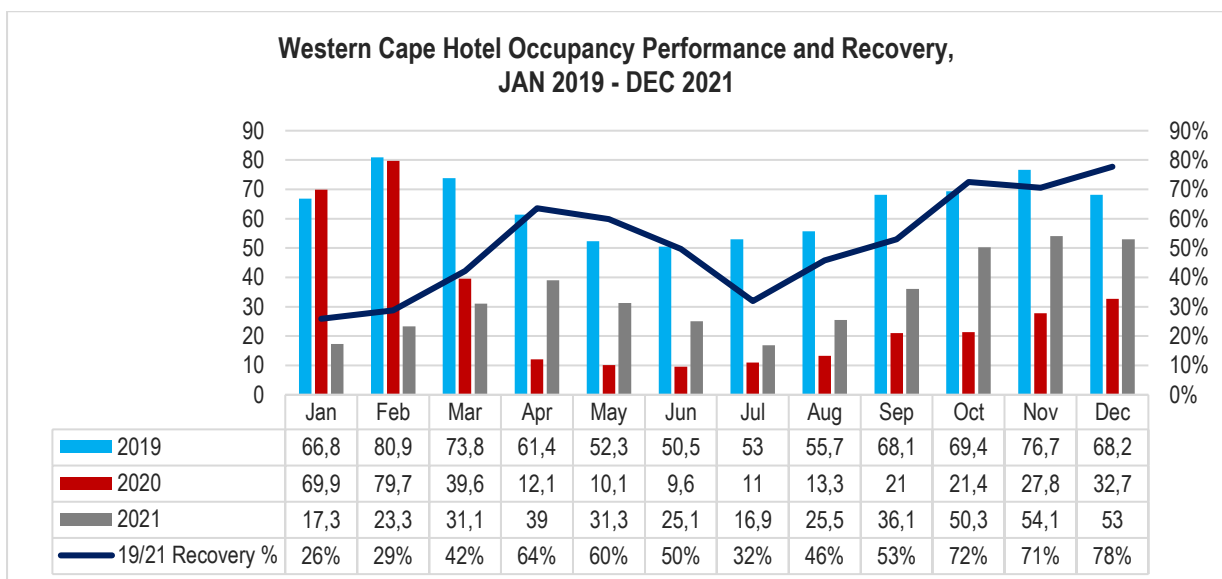
Source: Airports Company South Africa, 2022



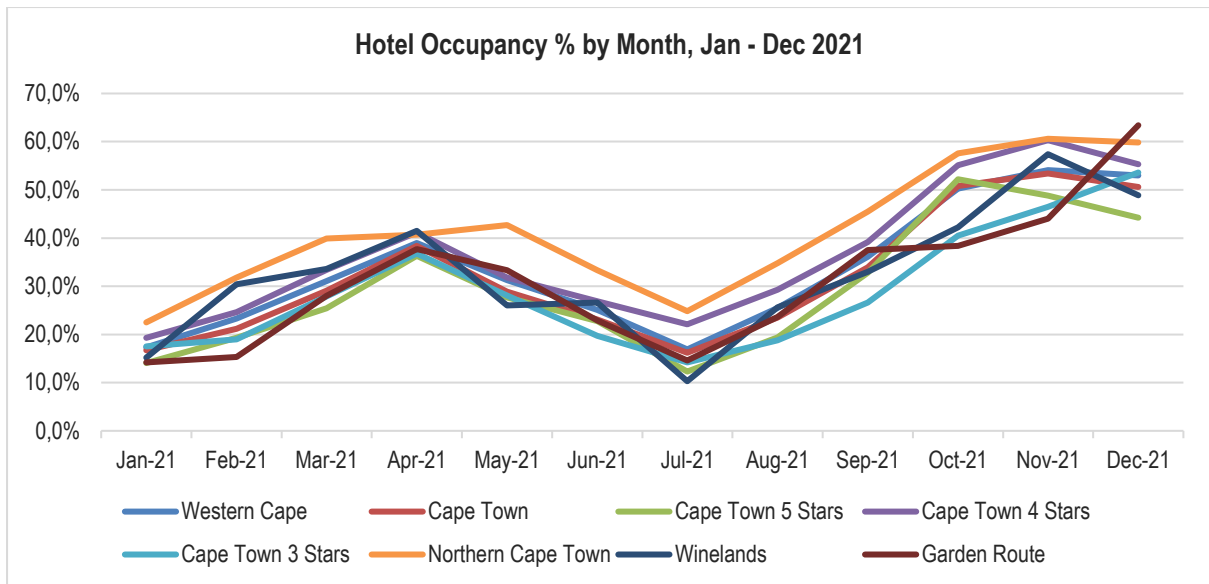
Source: Airports Company South Africa, 2022

2. Hotel Occupancy

- Hotel occupancy in the Western Cape reached its peak at 54% in November 2021, with a recovery rate of 71% when compared to the same month in 2019. December 2021 ranked second with 53% occupancy and a recovery rate of 78%.
- Similar to the domestic arrivals trend, hotel occupancy fluctuated between January and July 2021, as lockdown regulations changed due to the second and third waves of COVID-19 infections. October 2021 recorded the third highest occupancy percentage, at 50%, since the start of the pandemic
- As at December 2021, the year to date occupancy percentage in the Western Cape reached 33,5% compared to 64,1% over the same period in 2019 and 35,7% in 2020. For the period January to December 2021, revenue per average room was R423.81, compared to R 1 046.72 in 2019 and R591.89 in 2020.



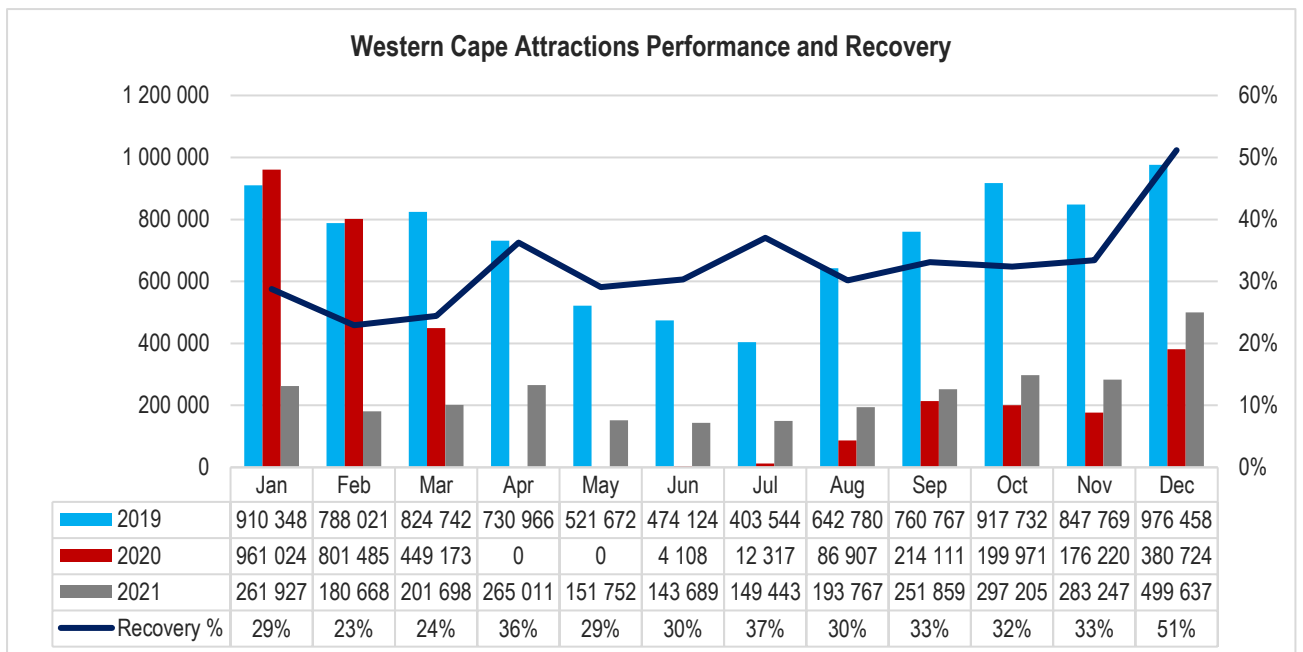
Source: STR Global, 2022



Source: STR Global, 2022

Western Cape Attractions

- Visitors to the participating Western Cape Attractions reached a total of 2,8 million between January and December 2021, compared to 8,8 million over the same period in 2019, a 33% recovery rate.
- Outdoor attractions in the Cape Overberg, Weskus, Garden Route and Karoo regions remain popular with many having exceeded 2019 visitor numbers, in some months throughout 2021.



Source: SANParks, LTO's, and Attractions, 2022

PARTICIPATING REGIONAL ATTRACTIONS - MONTHLY RECOVERY PERCENTAGE												
ATTRACTIONS	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
Cape Town												
Kirstenbosch Botanical Gardens	64%	50%	46%	57%	55%	56%	58%	52%	55%	53%	53%	60%
Robben Island	10%	5%	9%	20%	14%	14%	3%	5%	14%	27%	21%	46%
Table Mountain National Park	22%	20%	21%	32%	25%	25%	33%	23%	26%	27%	31%	47%
Table Mountain National Park: Boulders	9%	13%	13%	23%	15%	17%	17%	15%	22%	26%	29%	40%
Table Mountain National Park: Cape of Good Hope	23%	18%	19%	28%	24%	36%	24%	18%	21%	25%	24%	33%
Table Mountain Aerial Cableway	20%	13%	18%	28%	21%	19%	79%	24%	26%	25%	29%	57%
Cape Overberg												
Cape Agulhas Lighthouse	0%	0%	0%	0%	42%	36%	74%	44%	50%	57%	48%	63%
Agulhas National Park	7%	8%	8%	12%	47%	37%	72%	44%	44%	52%	51%	64%
Bontebok National Park	84%	59%	66%	106%	76%	53%	88%	59%	39%	61%	80%	63%
De Hoop Nature Reserve	59%	55%	47%	106%	113%	172%	138%	46%	81%	69%	54%	93%
De Mond Nature Reserve	51%	101%	52%	167%	66%	56%	136%	70%	106%	166%	70%	91%
Harold Porter National Botanical Gardens	200%	97%	85%	75%	110%	63%	145%	86%	67%	92%	76%	82%
Kogelberg Nature Reserve	379%	101%	75%	38%	80%	81%	207%	111%	121%	102%	111%	142%
Stony Point											47%	59%
Shipwreck Museum	20%	13%	30%	57%	20%	4%	0%	31%	9%	54%	52%	57%
Garden Route												
Cango Caves	21%	7%	13%	31%	16%	14%	2%	15%	19%	29%	21%	35%
Wilderness National Park	75%	56%	59%	103%	97%	70%	130%	68%	56%	88%	61%	77%
Tsitsikamma National Park	41%	22%	28%	54%	46%	42%	43%	26%	34%	38%	31%	67%
Knysna National Park	170%	61%	76%	146%	128%	54%	139%	103%	61%	128%	107%	124%
WESKUS												
West Coast National Park	34%	79%	70%	86%	67%	51%	60%	111%	93%	69%	58%	76%
!Khwattu	55%	42%	41%	86%	96%	64%	58%	75%	75%	74%	65%	85%
Old Jail	79%	86%	52%	92%	69%	35%	73%	119%	130%	124%	100%	102%
Cape Karoo												
Karoo National Park	75%	62%	74%	121%	115%	58%	124%	99%	71%	123%	121%	87%

Sources: SANParks, LTO's, and Attractions, 2022

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