



# RECOVERY DASHBOARD 2020

Cape  
Town  
TOURISM

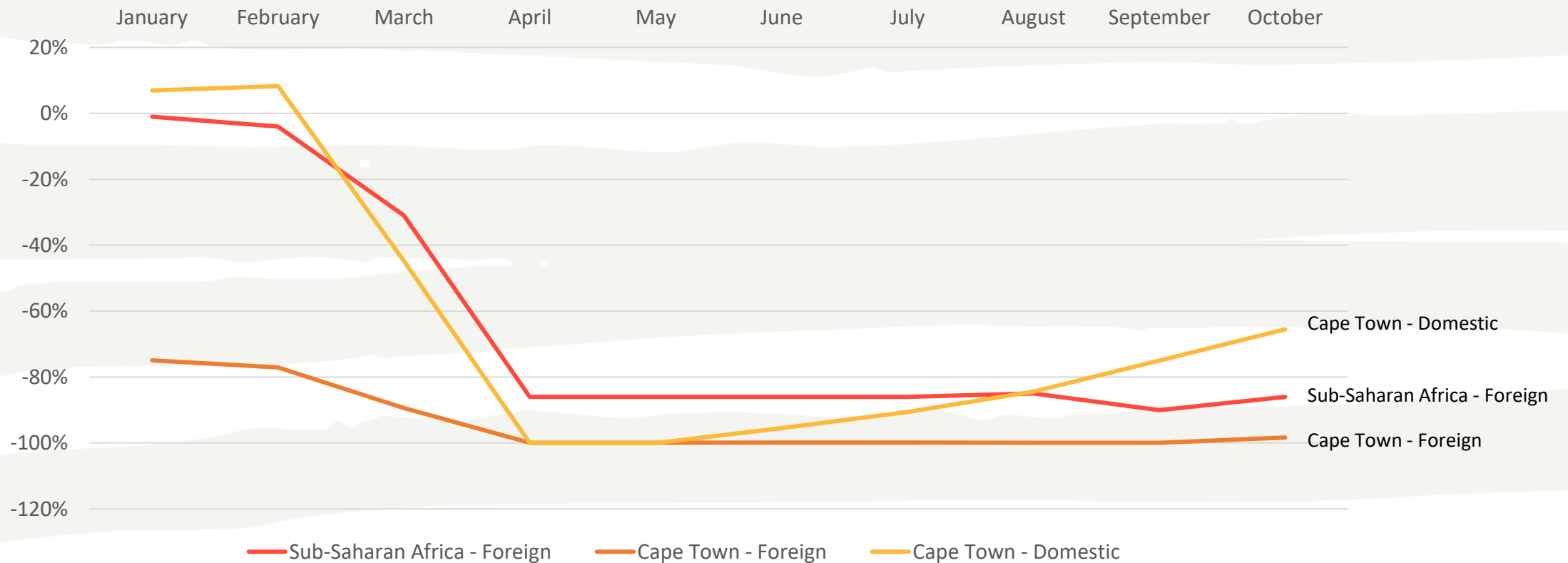
# TOURISM INSIGHTS IN AFRICA AND SOUTH AFRICA

<p>International Arrivals</p>	<p>South Africa is expected to get to pre-Covid-19 levels (over 10 million international arrivals) in 2023. - Euromonitor</p>	<p>In Sub-Saharan Africa, the percentage year-to-date change from 2019 to 2020 has decreased to -69%. - UNWTO  Currently, South Africa is at -68% year-on-year change- UNWTO</p>	<p>In 2021, the most significantly impacted inbound market is Asia Pacific to Sub-Saharan Africa and South Africa. - ForwardKeys</p>
<p>Accommodation – Hotels</p>	<p>Hotel bookings and occupancy are stabilizing since the impact of Covid-19 in Sub-Saharan Africa. – WTTC</p>	<p>Bookings and occupancy rates improved to -37% and -36% respectively since November 2020 in Sub-Saharan Africa - UNWTO</p>	<p>Post-pandemic, over 50% of surveyed travelers are looking to return to hotels in Sub-Saharan Africa. – Expedia Group</p>
<h2>GLOBAL</h2>			
<p>General Insights</p>	<ul style="list-style-type: none"> <li>• Domestic travel search has led travel searches internationally since April 2020. – Expedia Group</li> <li>• Early vaccine news had a positive impact on international travel. – Expedia Group</li> <li>• Middle Eastern and African traveler intent is anticipated to increase in Q3 2021.- Expedia Group</li> </ul>		

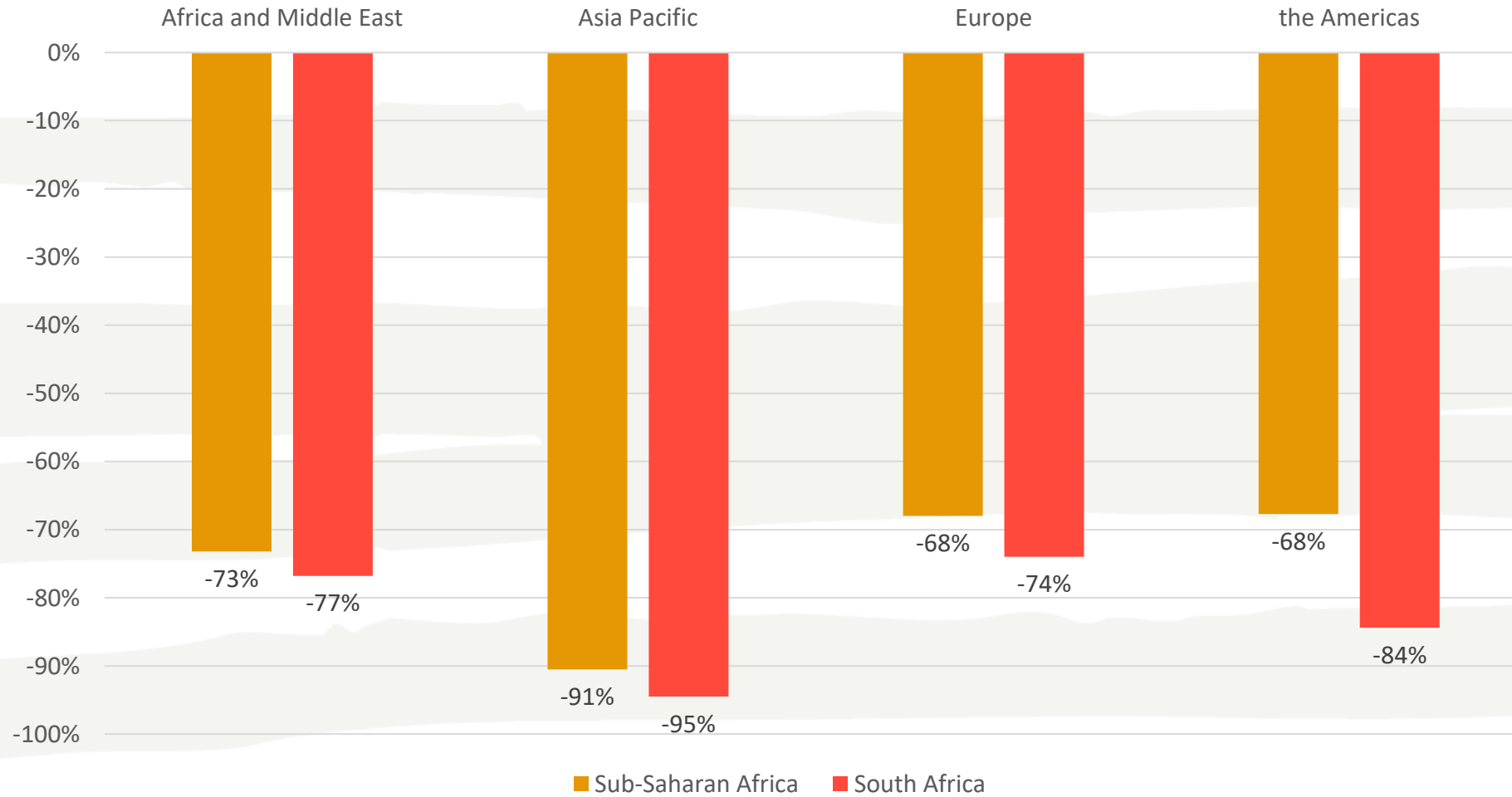
\*Insights reported as at 22 December 2020.

# INTERNATIONAL ARRIVALS VOLUMES

YOY % change in international arrivals in Sub-Saharan Africa as per UNWTO and Cape Town International Airport as per ACSA

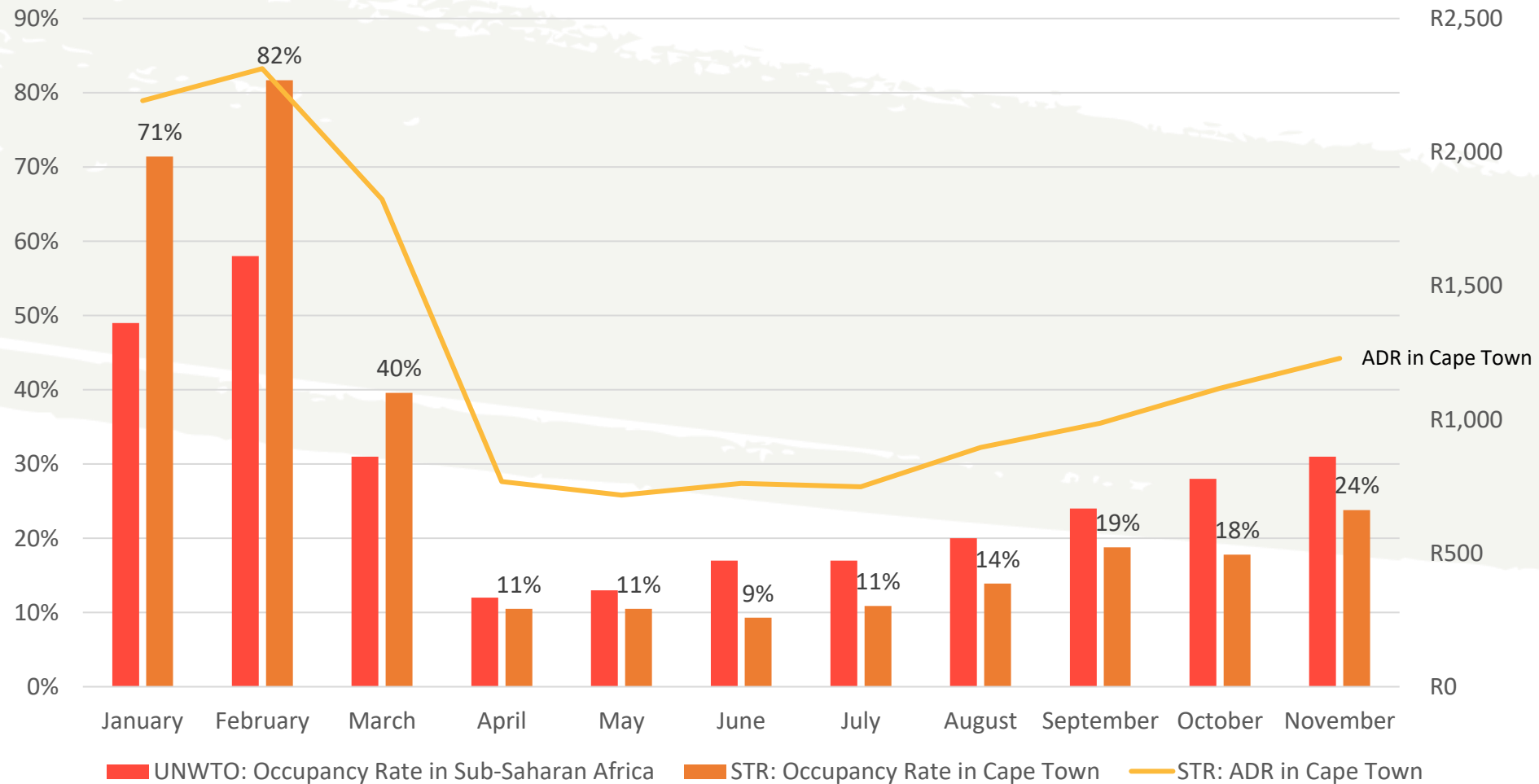


# Forward Keys PAX arrivals forecast in Sub-Saharan Africa and South Africa for the period 01 December 2020 – 31 December 2021



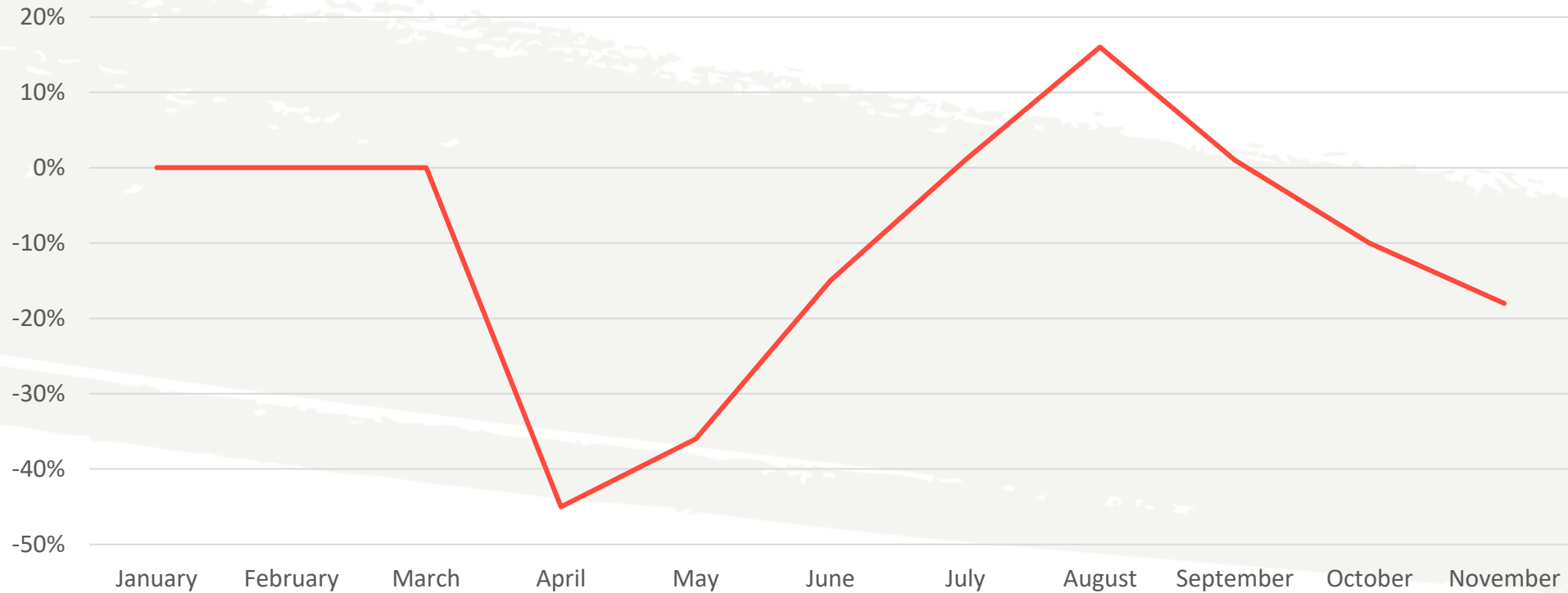
# ACCOMMODATION - HOTELS

Occupancy Rate and Average Daily Room Rate in Sub-Saharan Africa and Cape Town for the period January 2020 – December 2020



# RECREATIONAL ACTIVITY TRACKER

Local recreational activity was the most popular amongst travelers however, in the second wave of Covid-19, it has declined. - WTTC



\*Google Covid-19 Community Mobility for Retail and Recreation captures trends for restaurants, cafes, shopping centers, theme parks, museums, libraries and movie theaters. 0% is considered a baseline for the corresponding day of the week of 2019.