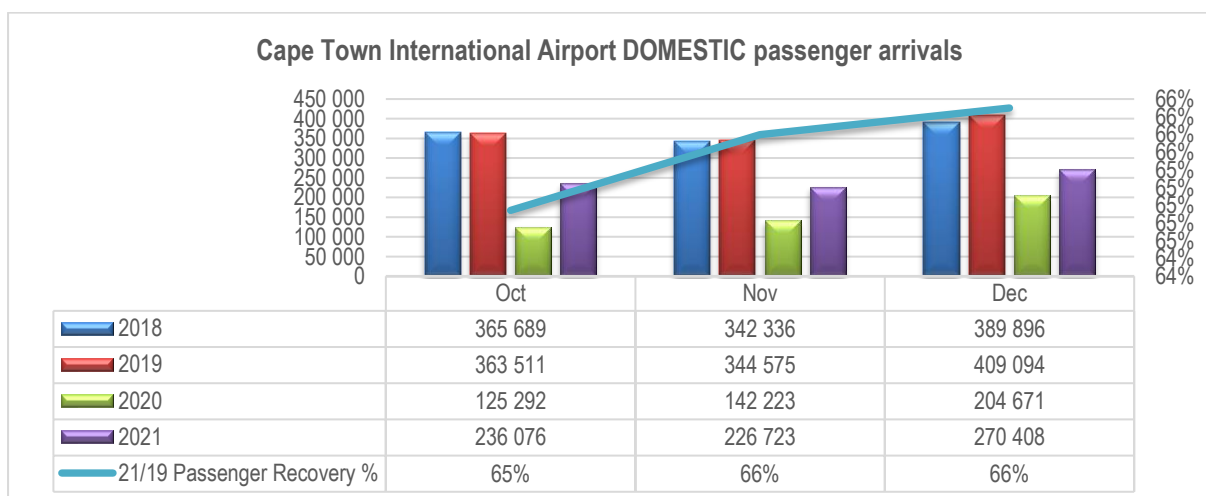
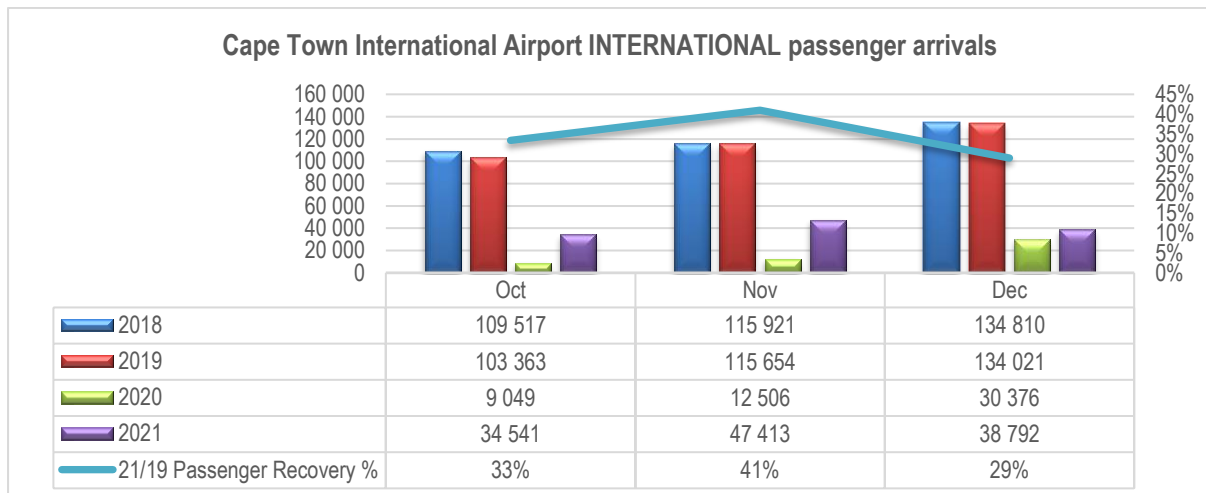


Western Cape Festive Season (Nov – Dec 2021) Performance

1. Cape Town International Airport Passenger Arrivals

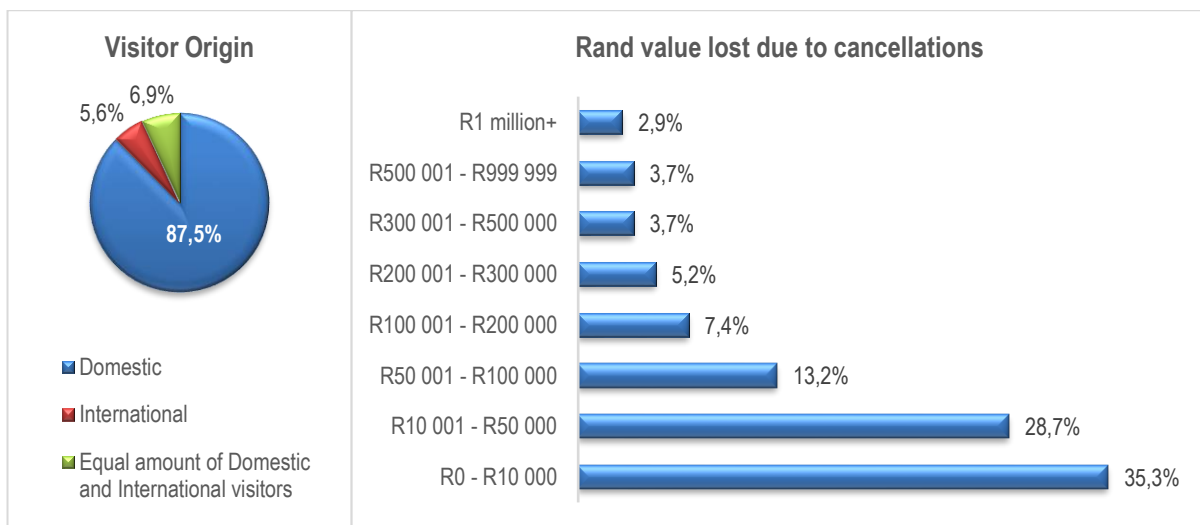
- **International arrivals** through the Airport performed well in October and reached its peak in November 2021 with a 41% recovery but decreased in December due to the emergence of the Omicron variant and the travel bans that ensued as a result.
- In December 2021 **international passenger arrivals** were less than a third of what they were in the same month in 2019 but grew by 28% from its 2020 figure.
- Since COVID, 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.
- In November, domestic passenger arrivals grew by 59% from 142 223 in 2020 to 226 723 in 2021, and 204 671 in December 2020 to 270 408 in the same month in 2021, a 32% increase.



Source: ACSA, 2022

2. Festive Season 2021 Performance Survey

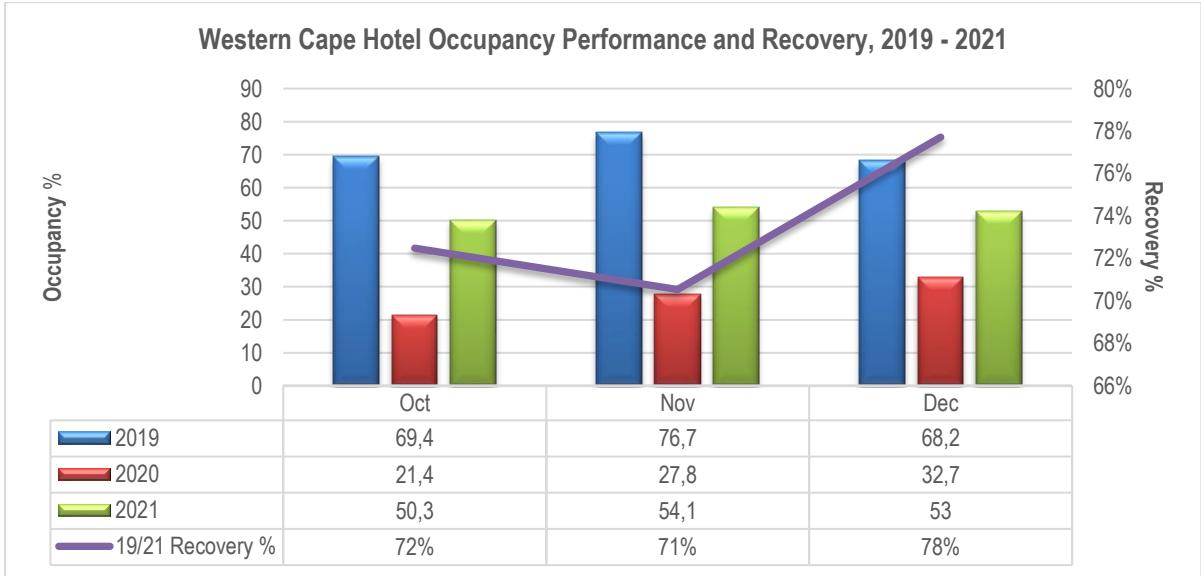
- Feedback obtained from 163 tourism businesses across the Western Cape revealed that visitors recorded over the 2021 festive season mainly originated from the local and domestic markets. Nearly 90% of respondents said that the majority of their visitors were domestic and 6% said that they had mostly international visitors, while a further 7% said that they had an equal amount of domestic and international visitors. This correlates with passenger movement through Cape Town International Airport, which saw 83% domestic and 17% international arrivals in November and 87% domestic and 13% international passenger arrivals in December.
- Based on feedback from respondents, the number of visitors nearly tripled from November to December. Many last-minute bookings were done, and far fewer internationals were seen over the festive season, compared to pre-pandemic periods. Staycations were popular, with many visitors opting to spend their time at accommodation spaces only. Many visitors just wanted a break but had limited cash to spend on local attractions and activities.
- There were many cancellations due to South Africa being placed on travel bans globally in late 2021, but some businesses were able to recover much of their losses as domestic bookings picked up with the easing of lockdown restrictions.
- For businesses that had cancellations, just over a third of them said that they lost up to R10 000 in monetary terms and close to 30% lost between R10 000 and R50 000. A further 13% lost between R50 000 and R100 000, and a fifth of respondents lost more than R100 000 in cancellations. Nearly half of respondents said that their revenue has increased compared to the same period in 2020, but close to a quarter of respondents said that their revenue has decreased significantly.
- The biggest concern among respondents is getting international tourists back to the region and uncertainty about the future.

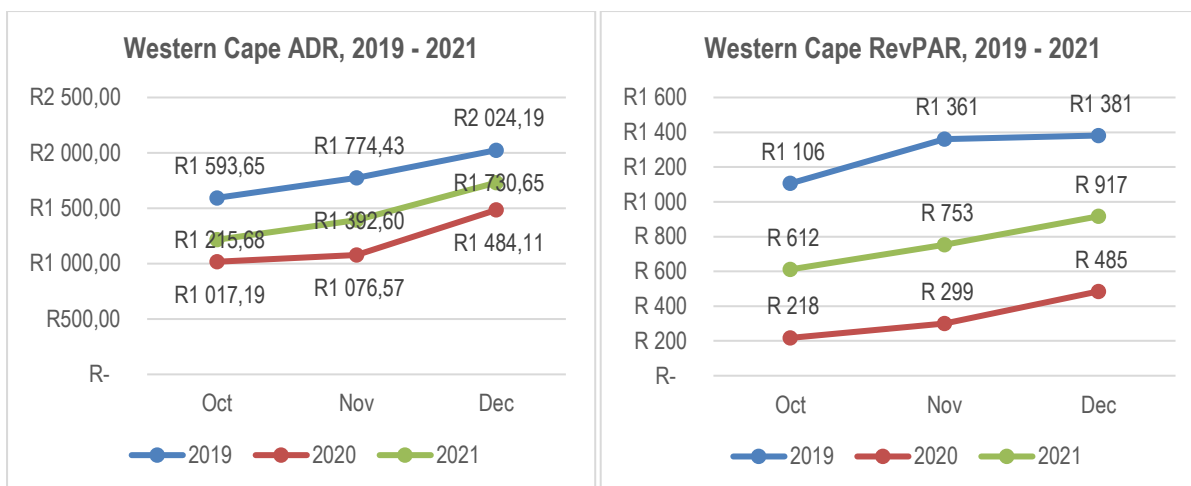




3. Hotel Occupancy

- Occupancy percentage in the Western Cape reached 54.1% in November 2021 compared to 27.8% in the same month in 2020 and reached a recovery rate of 71% when compared to the 76.7% occupancy in November 2019.
- December 2021 saw a similar trend with 53% occupancy compared to 32.7% in the same month in 2020, and 68.2% occupancy in December 2019 (78% recovery rate).
- The Average Daily Rate (ADR) for the Western Cape grew to R1,392.60 in November and R1,730.65 in December 2021 with recovery rates of 78% and 85% of their 2019 figures, respectively.
- RevPAR (Revenue Per Average Room) doubled from November to December 2021 compared to the same months in 2020 and recovered to 55% and 66% of their respective 2019 figures.





Source: STR Global, 2022

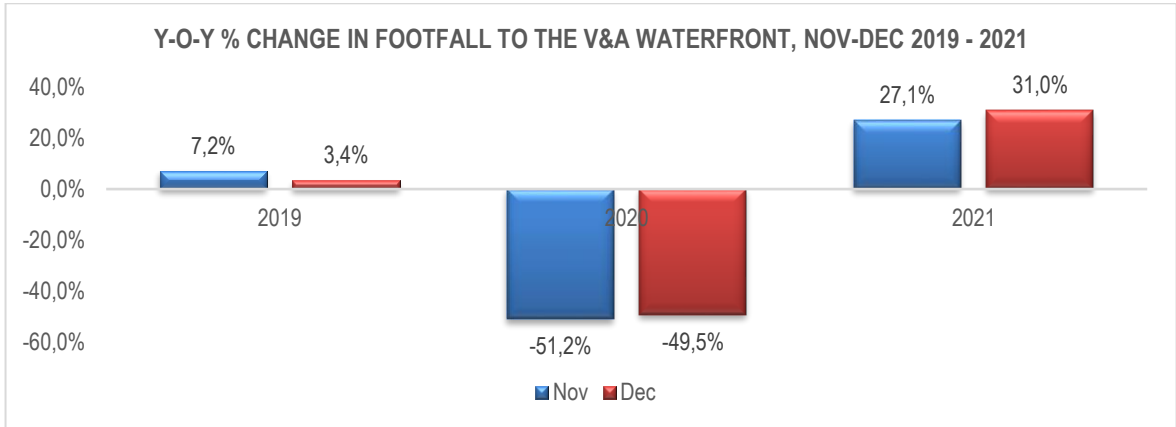
4. Performance of Cape Town Major Attractions

- All the attractions listed below experienced growth in visitor numbers in both November and December 2021, except for Kirstenbosch National Botanical Gardens who recorded a -16% decline in visitors when compared to December 2020.
- However, Kirstenbosch Gardens has recovered to half of its 2019 figures in both months. Table Mountain, despite high year-on-year growth, has recovered to around a third of its 2019 figures. Robben Island showed recovery rates of 21% and 46% in November and December, respectively.
- The V&A Waterfront reported that they were starting to see some optimism creep in as international traveller numbers returned but that was quickly taken away with the discovery of the Omicron variant and subsequent flight bans. According to the iconic attraction, December figures highlight the traditional festive season and holiday increase in volumes and showed an enhanced level of growth in 2020. This is mainly due to an influx of domestic travellers and the easing of lockdown restrictions.

Attraction	Nov 2020/2021 % Change	Nov 2019/2021 Recovery %
Table Mountain National Park	+85%	31%
Table Mountain Aerial Cableway	+102%	29%
Table Mountain National Park: Cape of Good Hope	+59%	24%
Kirstenbosch National Botanical Garden	+6%	53%
Table Mountain National Park: Boulders	+274%	29%
Robben Island	+261%	20%

Attraction	Dec 2020/2021 % Change	Dec 2019/2021 Recovery %
Table Mountain National Park	+35%	47%
Table Mountain Aerial Cableway	+69%	57%
Table Mountain National Park: Cape of Good Hope	+7%	33%
Kirstenbosch National Botanical Garden	-16%	49%
Table Mountain National Park: Boulders	+52%	40%
Robben Island	+179%	46%

Sources: Table Mountain National Park, SANParks, Table Mountain Aerial Cableway, Robben Island, and Kirstenbosch National Botanical Garden, 2022



Source: V&A Waterfront, 2022

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