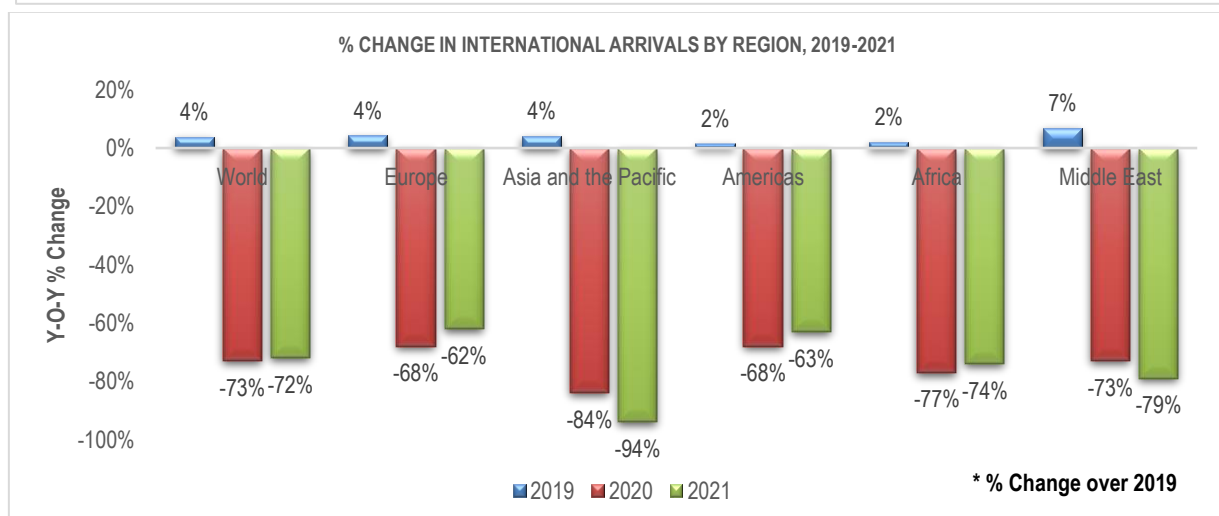
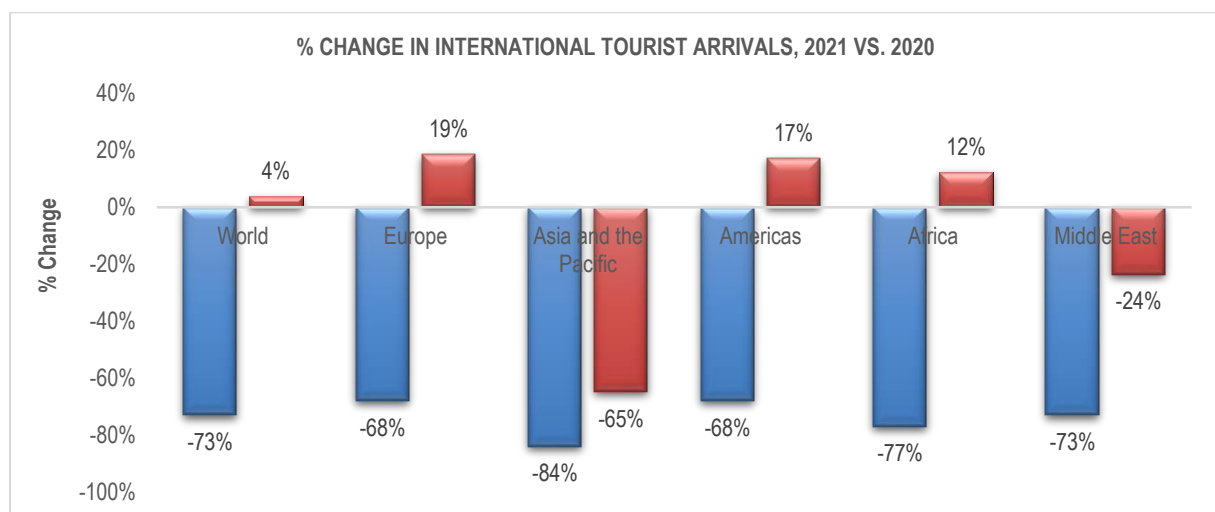


Western Cape Tourism Performance: 2021

1. Global Tourism Performance

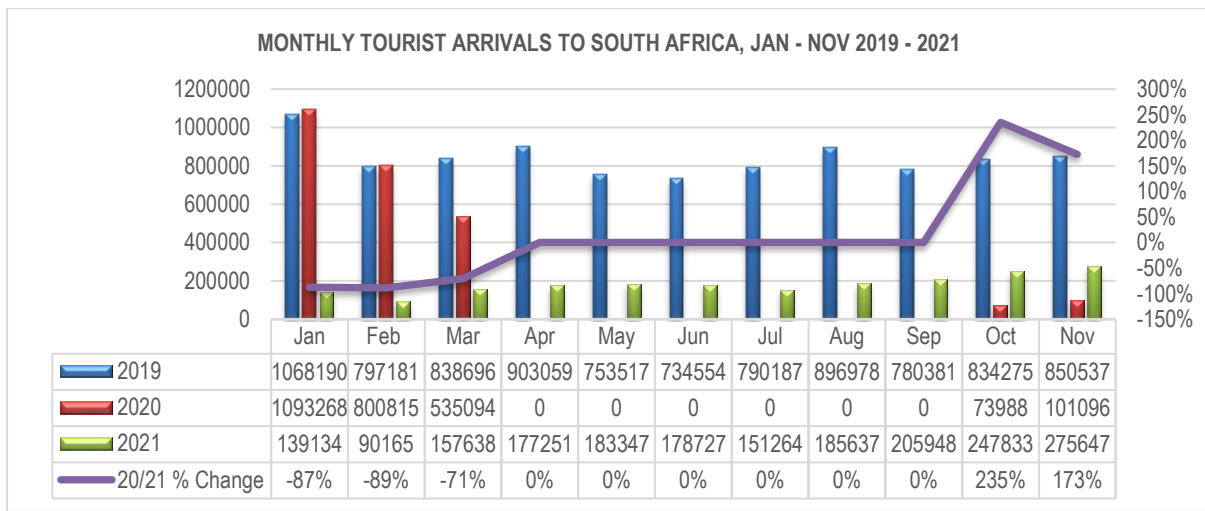
- According to the United Nations World Tourism Barometer, international tourist arrivals (overnight visitors) grew by 4% over the period January – December 2021 when compared to the same period in 2020 but remained 72% below 2019 levels.
- Europe (+19%) and the Americas (+17%) recorded the strongest growth, followed by Africa (+12%), though all three regions remained more than 60% below 2019 levels.
- Arrivals declined in the Middle East (-24%), and Asia and the Pacific (-65%) compared to 2020 and dropped 79% and 94% respectively from 2019 levels.
- The UNWTO credits rising vaccination rates combined with softer travel restrictions due to increased cross-border coordination and protocols, for the ease of pent up demand in 2021.
- Domestic travel will continue to drive recovery and is fuelled by demand for destinations that are closer to home and have low population density, with tourists looking for open-air activities, nature-based products and rural tourism.



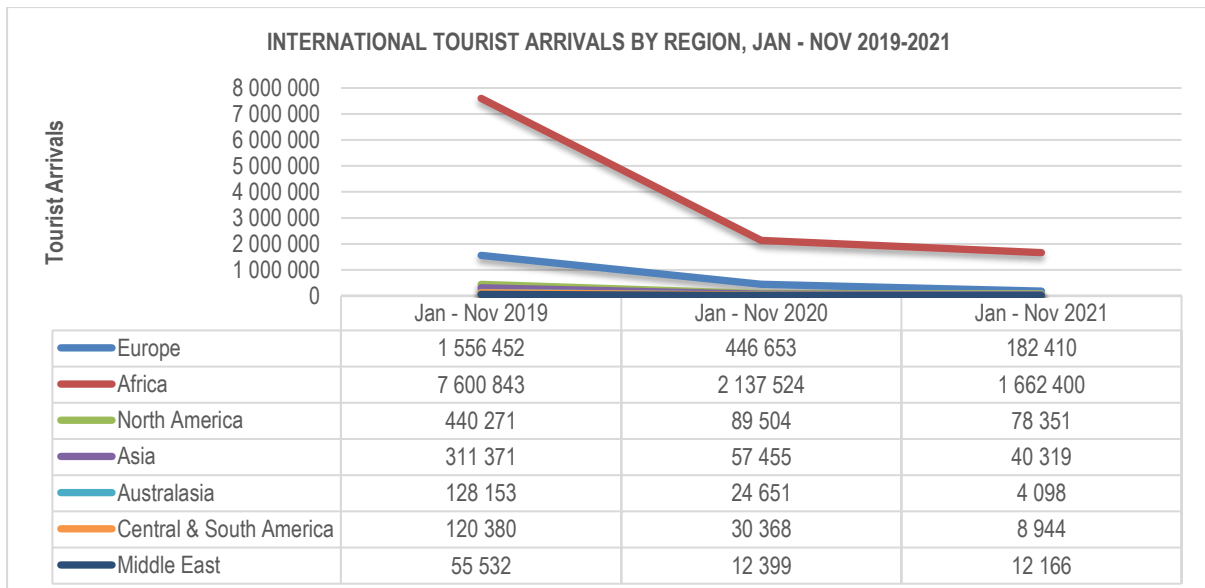
Source: United Nations World Tourism Organisation, 2022

2. South Africa: National Tourism Performance

- Foreign tourist arrivals reached close to 2 million between January and November 2021, decreasing by -23% 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 November has been the best performing month for the year thus far (StatsSA, 2022).
- The biggest decline in international arrivals to South Africa came from the Australasian market (-83.4%), followed by Central & South America (-70.5%) and Europe (-59.2%).
- Travel from African markets (1 662 400) was the biggest source of tourist arrivals to South Africa in 2021 and the Middle East represented the smallest decline (-1.9%).



Source: Stats SA, 2022

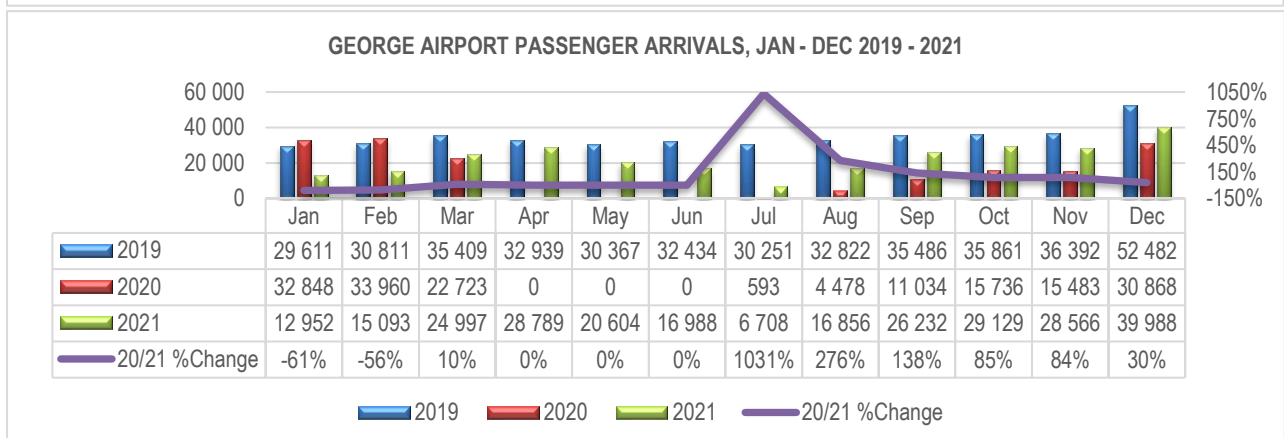
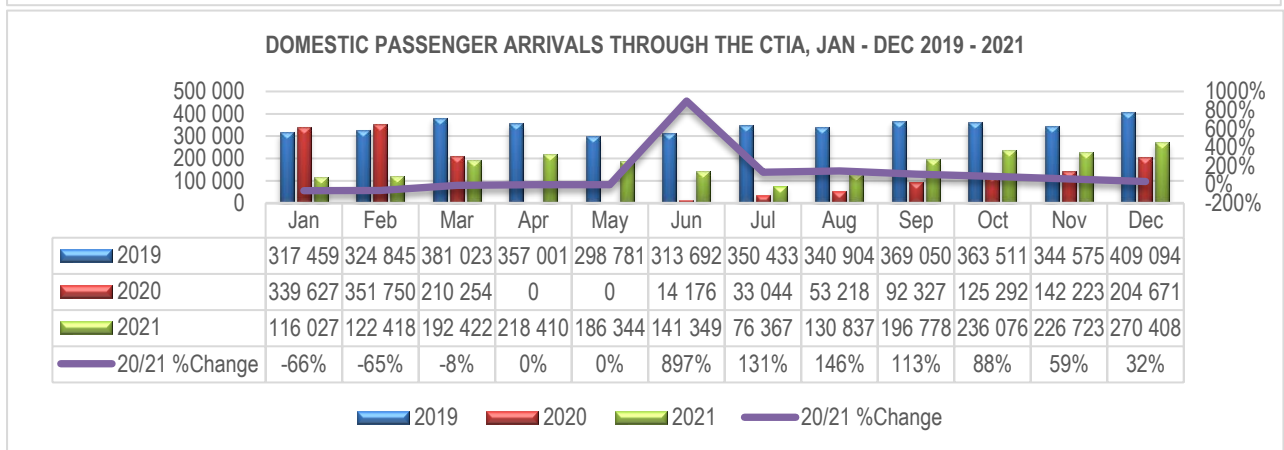
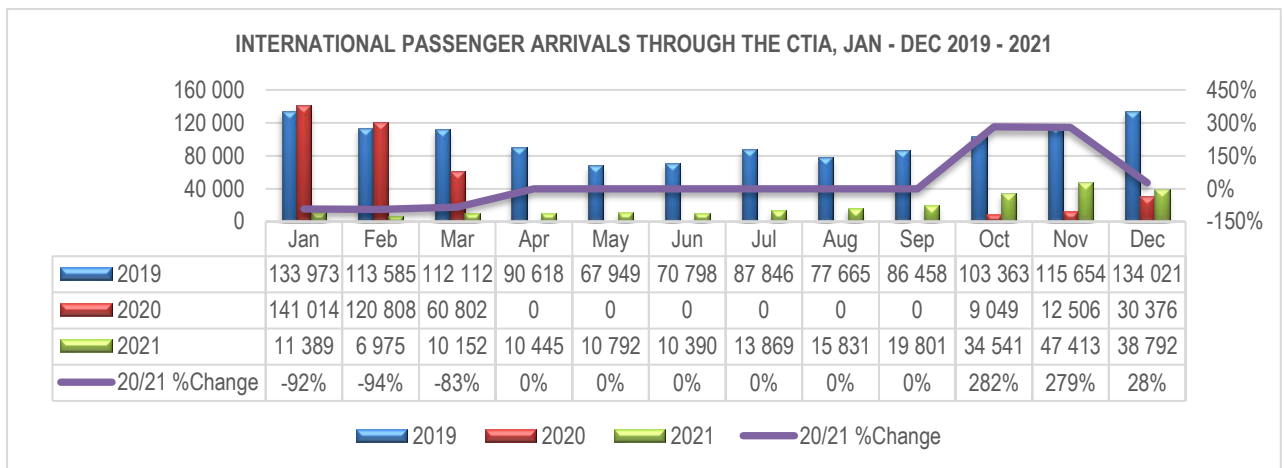


Source: Stats SA, 2022

3 Western Cape Tourism Performance

3.1 Airport Arrivals

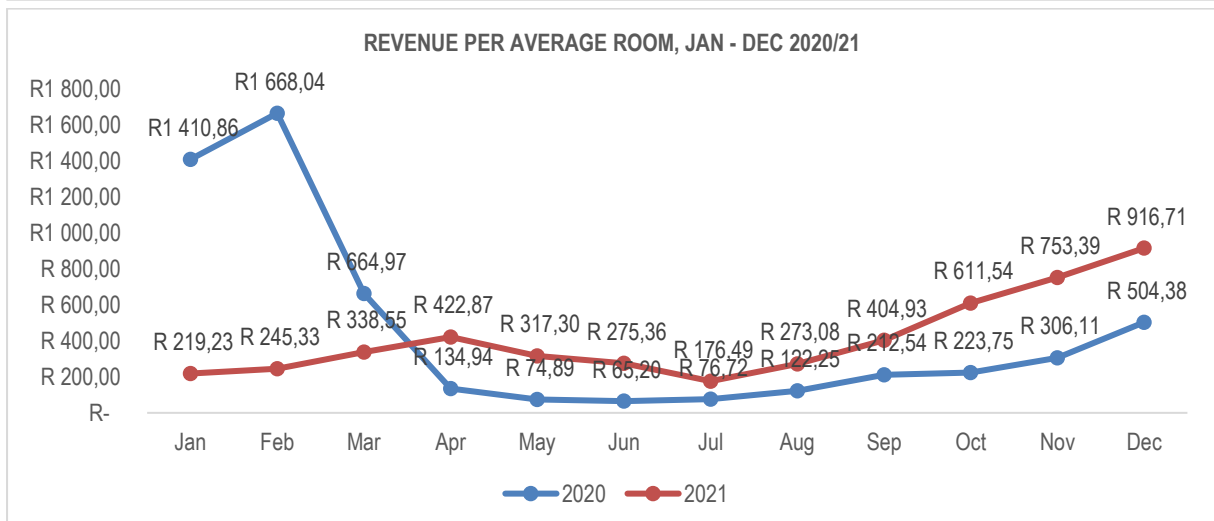
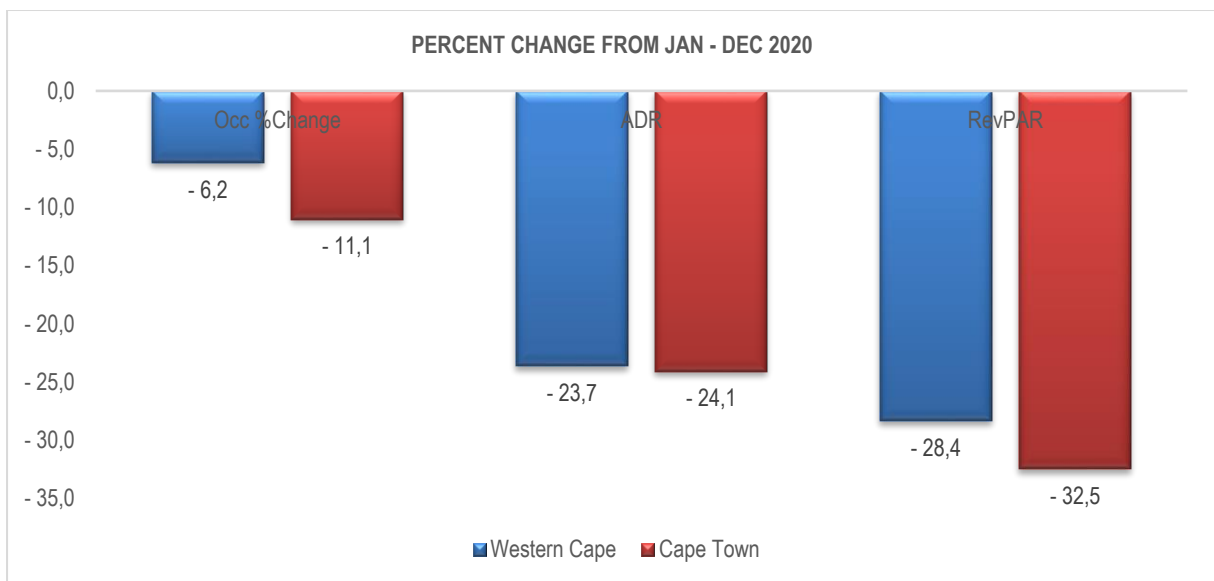
- Domestic arrivals through Cape Town International Airport grew by 35% y-o-y in 2021 compared to 2020 and reached its peak at 270 408 passengers in December 2021. Y-o-y growth of 897% in June is because of hard lockdown measures having only eased since June 2020.
- Domestic arrivals at George Airport grew by 59% y-o-y in 2021 compared to 2020 and reached its peak at 39 988 passengers in December 2021.
- International arrivals declined by 38.5% in 2021, reaching a total of 230 390 passengers compared to 374 555 in 2020. This decline can be attributed to travel restrictions from key source markets.



Source: Airports Company South Africa, 2022

3.2 Hotel Occupancy

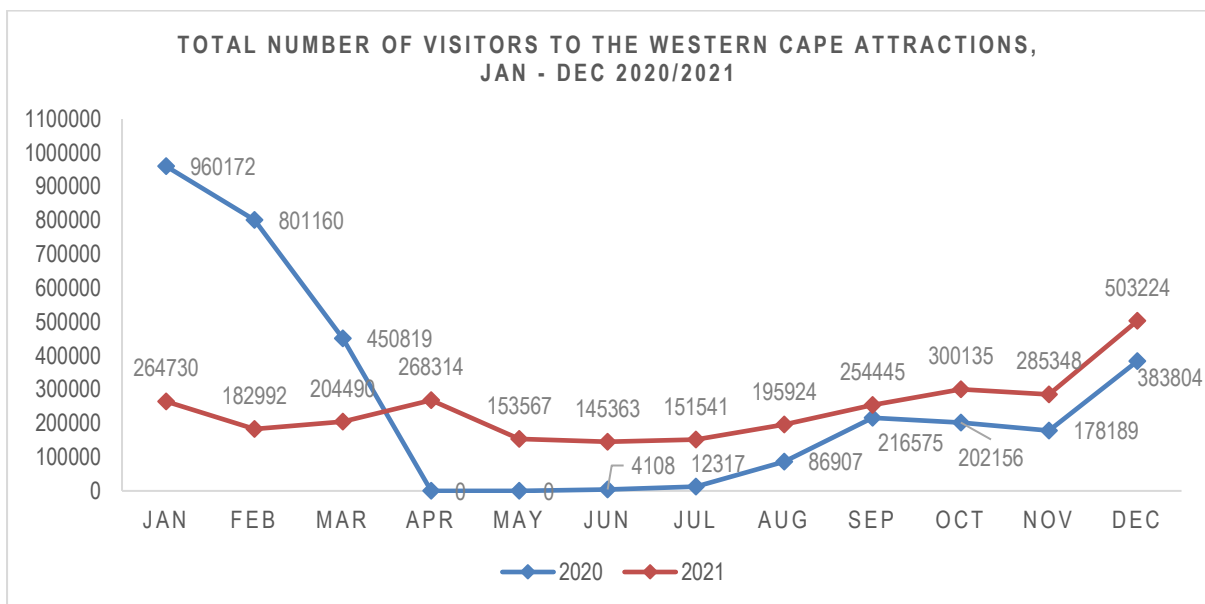
- As at December 2021, the year to date occupancy percentage in the Western Cape reached 33.5% compared to 35.7% over the same period in 2020 (a decline of 6.2%). Revenue per average room (RevPAR) declined by 28.4% going from R591.89 in 2020 to R423.81 in 2021.
- For Cape Town, the year to date occupancy percentage was 31.9% compared to 35.9% in 2020 (11.1% decline) and revenue per average room was R446.60 compared to R661.94 in 2020 (32.5% decline).
- The Average Daily Rate (ADR) for both the Western Cape and Cape Town declined by close to 25%, going from R1,655.84 to R1,264.02 and R1,844.85 to R1,399.81 respectively.
- RevPAR between April and December 2021 doubled when compared to the same time in 2020, but the fallout from pre-pandemic figures between Jan and March 2020 puts the overall annual change in a decline.



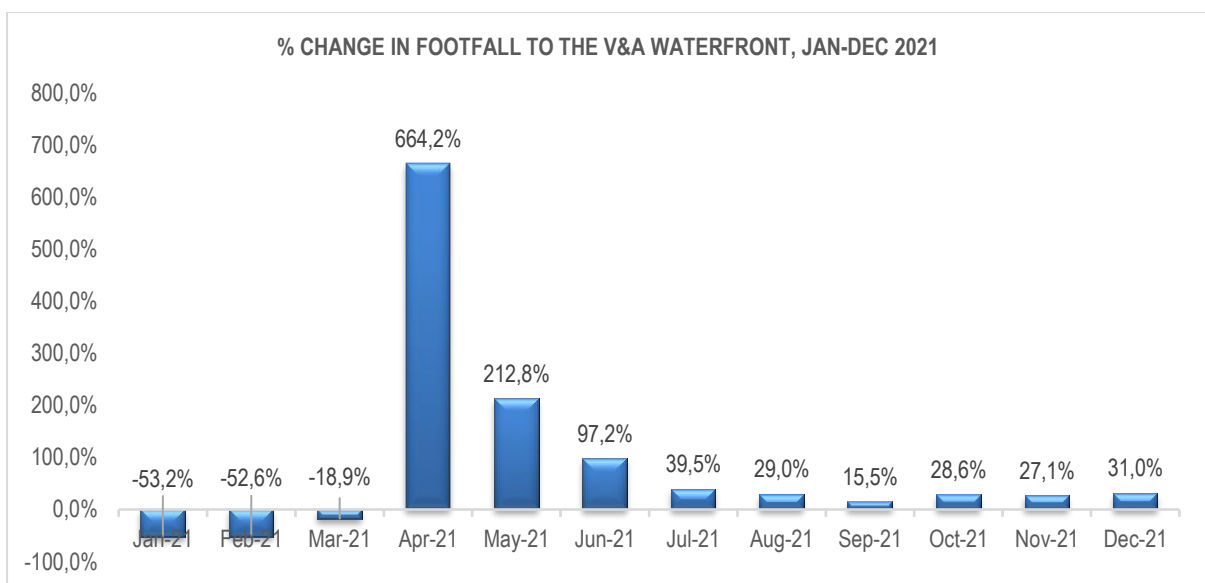
Source: STR Global, 2022

3.3 Western Cape Attractions

- The participating Western Cape Attractions received 2 910 073 visitors over the period January to December 2021, an 11.7% 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. Year on year growth continued at a more stable rate over the third and fourth quarters.
- Visitor numbers to the V&A Waterfront recovered slowly since the Level 5 Lockdown in April 2020. School holidays and significantly wetter weather during winter prompted visitors to look for indoor entertainment. The change in Lockdown Levels and its regulations, impacted visitor numbers to the attraction throughout the pandemic.
- Arniston Hotel & Spa (111.9%), De Hoop Nature Reserve (104.6%), Knysna National Park (69.8%) and Stony Point (66.9%) 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	2020	2021	Y-O-Y % Change
Cape Town			
Kirstenbosch Botanical Gardens	489 367	506 639	3,5%
Robben Island	97 034	56 281	-42,0%
Table Mountain National Park	1 089 555	888 860	-18,4%
Table Mountain National Park: Boulders	243 410	166 537	-31,6%
Table Mountain National Park: Cape of Good Hope	363 647	275 433	-24,3%
Table Mountain Aerial Cableway	384 183	292 968	-23,7%
Cape Overberg			
Cape Agulhas Lighthouse	7 505	11 961	59,4%
Agulhas National Park	10 330	15 113	46,3%
Bontebok National Park	12 654	14 877	17,6%
De Hoop Nature Reserve	7 665	15 684	104,6%
De Mond Nature Reserve	5079	6 074	19,6%
Harold Porter National Botanical Gardens	27 021	40 016	48,1%
Kogelberg Nature Reserve	7373	8 071	9,5%
Stony Point	18 053	30134	66,9%
Shipwreck Museum	2528	2 254	-10,8%
Arniston Hotel & Spa	14 239	30170	111,9%
Garden Route			
Cango Caves	61 481	46 820	-23,8%
Wilderness National Park	66 200	85 072	28,5%
Tsitsikamma National Park	129 287	137 126	6,1%
Knysna National Park	21 094	35 808	69,8%
WESKUS			
West Coast National Park	205 425	196 024	-4,6%
!Khwattu	9 741	12 870	32,1%
Old Jail	4 798	6 738	40,4%
Cape Karoo			
Karoo National Park	18 538	28 543	54,0%

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

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