ANNUAL REPORT 2021/22

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FROM THE CHAIRPERSON

BRETT HENDRICKS
Chairperson

The past year has seen encouraging growth in both international and local travel and hospitality in Cape Town. We won several prestigious destination awards which we are extremely proud of. Being recognised as a truly world-class destination shows us all, as an industry, that the hard work behind the scenes, doesn't go unnoticed.

Our focus over the past year was to rebuild visitor confidence in both domestic and international markets, and keep Cape Town top of mind. We also focused on conversion in the domestic market. We continued to be the supportive voice of our local tourism industry and also on World Tourism Day last year, we launched our 'Roll Up Your Sleeve' vaccination campaign, aimed at building visitor confidence, by promoting an increase in local vaccinations.

Our two domestic conversion campaigns aimed to counteract the loss of international travel, including the mass cancellations from the announcement of the Omicron variant in December.

And in March this year, we launched our biggest international marketing programme ever executed by Cape Town Tourism.

It centred around an interactive immersive gaming experience, with many in-and-out-of-destination marketing elements being delivered in unison to drive the 'Big Bang' impact.

To date, Find Your Freedom has been a finalist in the DSTV Content Creator Awards in 2 categories and recently scooped up four awards at the 10th annual Supersonic New Generation Awards. The kind of innovation we have seen from the team with Find Your Freedom is quite remarkable!

And with a strong desire to be bold and ground-breaking, there were a number of strong partnerships formed. By combining expertise, we were able to create a unique experience that has yielded fantastic results for both CTT and partners alike.

We launched our TikTok partnership, creating specific filters and using local content creators to tell our Find Your Freedom story. And we partnered with GoPro Global. They have excellent reach in the US, UK and German millennial audiences, and the fit for travel, exploration and adventure was perfect.

We recently signed a partnership agreement with visitBerlin. Through our global partnerships, we aim to inspire sustainable travel globally.

We also challenged ourselves to focus on a sustainable growth plan to ensure our small businesses in our communities get the same exposure as the main tourist attractions do. We've considerably increased our presence in schools, educating learners about the importance of our sector and we've spent time with SMMEs in our communities, expanding on our Neighbourhood Experience Development Programme to help rebuild tourism.

Every effort has been made to support our tourism and hospitality businesses and provide some financial relief. We were able to carry on offering you a 100% free membership package which we extended until the end of the fiscal year.

We are well onto the road to recovery, and we remain resolute in our mission to help all locals to Love Cape Town, and make our city a better place to live for all our citizens through tourism.

So now it's time for all of us to 'Find Your Freedom' with the 'X' representing our purpose, our striving towards innovation and sustainability – it's about being truly transformative as an organisation, as an industry and as a city.

THE CAPE TOWN TOURISM BOARD

Alison Coughlan

Deidre Davids

Enver Duminy (CEO)

Lance Greyling * (ex-officio)

Brett Hendricks (Chairperson)

Ayanda Mazibuko

Tracy Mkhize

Wahida Parker

Joanne Selby

Leigh Thomas

James Vos * (Alderman: ex-officio)

FROM THE CEO

ENVER DUMINY
CEO

What a rollercoaster ride it has been, there were parts we enjoyed, however, there were times when screaming, was our only option as many **doors closed permanently.**

We delivered innovative campaigns, inspiring initiatives and localised programmes to re-establish our hard-earned position as a top tourism destination.

Our theme this year is **'FIND YOUR FREEDOM X'**. The X is about the **transformative steps** we **must** take as an industry. Over the past year we have seen growth in arrivals, occupancy, and visitor numbers and forward-bookings are looking good. However, there is still a way to go. We must remain brave and take **huge leaps** to overcome the **chasm of challenges**, that plague our communities, our city and our country.

Concerns over safety and security remains the central deterrent for visitors to Cape Town. We will continue to work closely with our partners to address these perceptions head-on.

We will also continue to focus on our **'Future Tourism Leaders Programme'**. We work with high schools where Tourism is a subject. Unfortunately, the current syllabus is outdated, teachers, have never worked in the industry, and scholars, have never been a tourist in their own city. By sharing our vast knowledge and experience, we can play an important role in shaping our future leaders in tourism.

Figures show that 80% of SMEs are using mobile devices as part of their day-to-day operations. While only half of them are using social media for growth. That is what our Ekasi and BDF programmes solve. We identify gaps and opportunities like connectivity, digitisation, and social media marketing to diversify or grow these businesses.

People and Place have always been the secret ingredient of our destination offering. That is why, our inaugural '**Freedom to Wish'** campaign is a celebration of Cape Town for Capetonians**.** It is our way of thanking locals for making us, the best city in the world**.** Through the generosity of our members and partners, we made over 300 wishes come true in a single month and hope to double or even triple those wishes next year.

We knew that our membership model needed a refresh we conducted in-depth surveys, workshops and global benchmarking. Most of our members were happy with the overall programme, however, price sensitivity remains a challenge. Therefore we are introducing a new entry-level tier, called **Basic** which has minimal benefits that will support businesses as they start up again. We will also be sharing a jam-packed member events calendar soon. We are also officially launching our new website and member portal aimed at giving members greater exposure to a global and domestic audience including product and profile management, data and analytics, and coming soon, online advertising opportunities.

As an evolution of our Neighbourhood Experience Development Programme we will be amplifying our local hoods to drive geographic spread and getting the tourist dollars to where it is needed most. **It's about uplifting our communities**

We are optimistic about the future. We have a strong brand in Cape Town and CTT. We have transformative plans, with some programmes already in motion, and we look forward to a fantastic year ahead.

GLOBAL AWARDS AND ACCOLADES

FOR CAPE TOWN (2021/22)

TRAVEL + LEISURE
Number 1 Destination in the Middle East and Africa

WORLD TRAVEL AWARDS
Africa's Leading City Destination

WORLD TRAVEL AWARDS
World's Leading Festival and Event Destination

HALAL IN TRAVEL AWARDS
Most Promising Muslim-friendly City Destination of the Year (Non-OIC)

THE DAILY TELEGRAPH
Third Greatest City on Earth

FOR CAPE TOWN TOURISM (2021/22)

GOLD AWARD AT THE INTERNATIONAL TOURISM FILM FESTIVAL AWARDS
That Homegrown Feeling

SILVER AWARD AT THE INTERNATIONAL TOURISM FILM FESTIVAL AWARDS
Captivating Cape Town

SILVER AWARD AT THE INTERNATIONAL TOURISM FILM FESTIVAL AWARDS
We Are Worth Waiting For!

ONLINE TRAVEL TRAINING (OTT) COURSE
Rated Top 3 Most Popular Destination Courses in 2021 for the UK and USA Markets

FINALIST IN THE DSTV CONTENT CREATOR AWARDS FOR BEST INFLUENCER CAMPAIGN
Find Your Freedom

FINALIST IN THE DSTV CONTENT CREATOR AWARDS
Best Game/App for Find Your Freedom

Tourism campaigns out of the African continent are getting creative and breaking stereotypes in a way never before seen: Find Your Freedom – Skift

KEY INDUSTRY INDICATORS (1 JULY 2021 - 30 JUNE 2022)

CAPE TOWN INTERNATIONAL AIRPORT ARRIVALS

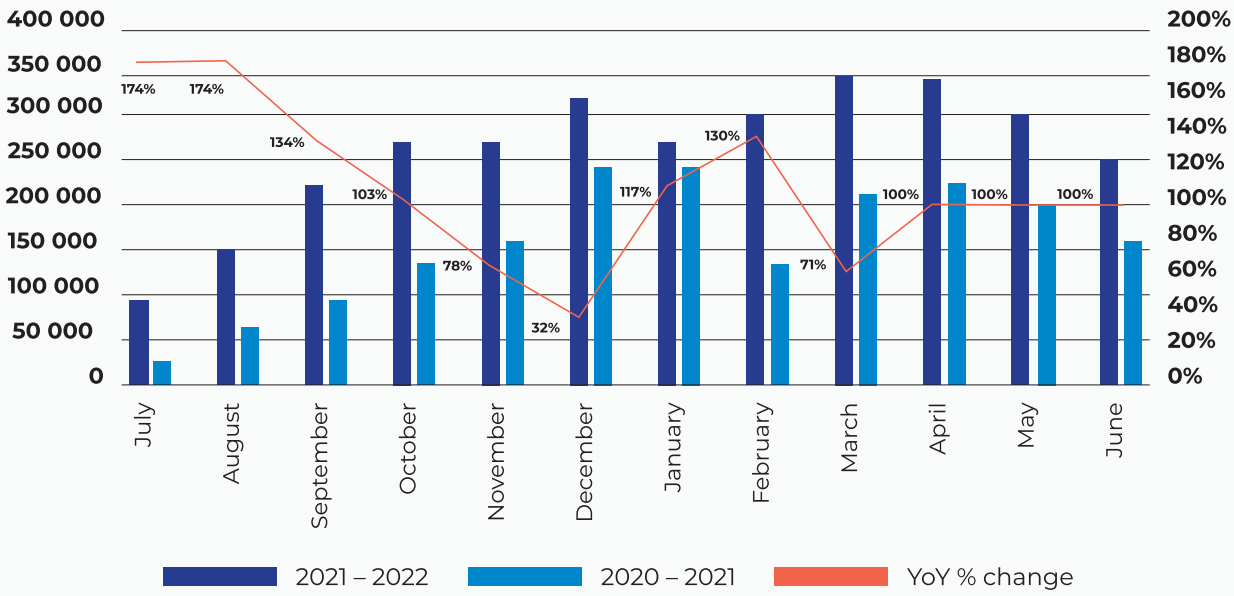
Cape Town International Airport (CTIA) welcomed just over 3.1 million passengers, a recovery of 58% compared to the same period in 2018/19.

CTIA PASSENGER ARRIVALS PER QUARTER

CTIA (2021/22)	Q1 JUL – SEP	Q2 OCT – DEC	Q3 JAN – MAR	Q4 APR – JUN
Domestic	403 982	733 207	740 544	712 863
Foreign	49 501	120 746	176 648	163 755
Totals	462 841	869 119	931 941	895 887

Note: Totals include unscheduled flight arrivals.

MONTHLY ARRIVALS BREAKDOWN



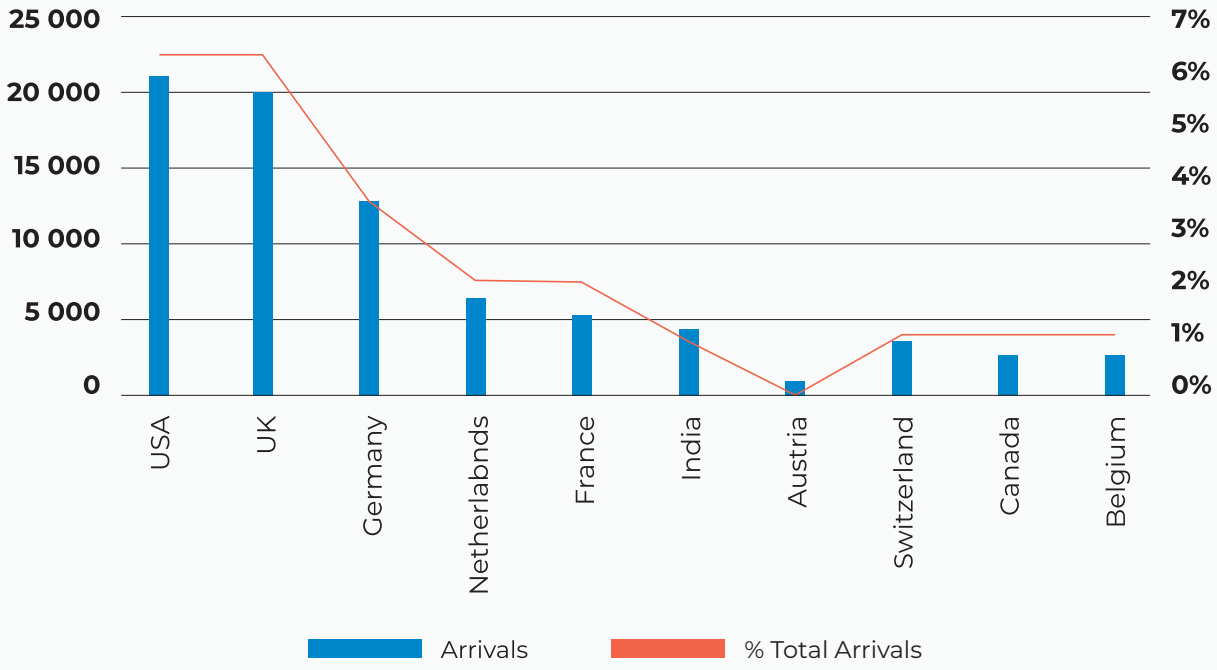
TOTAL ARRIVALS	YOY CHANGE
3 159 788	**79%**

CTIA PASSENGER ARRIVALS PER CATEGORY

YOY CHANGE	59%	274%	356%

SOURCE MARKET ARRIVALS

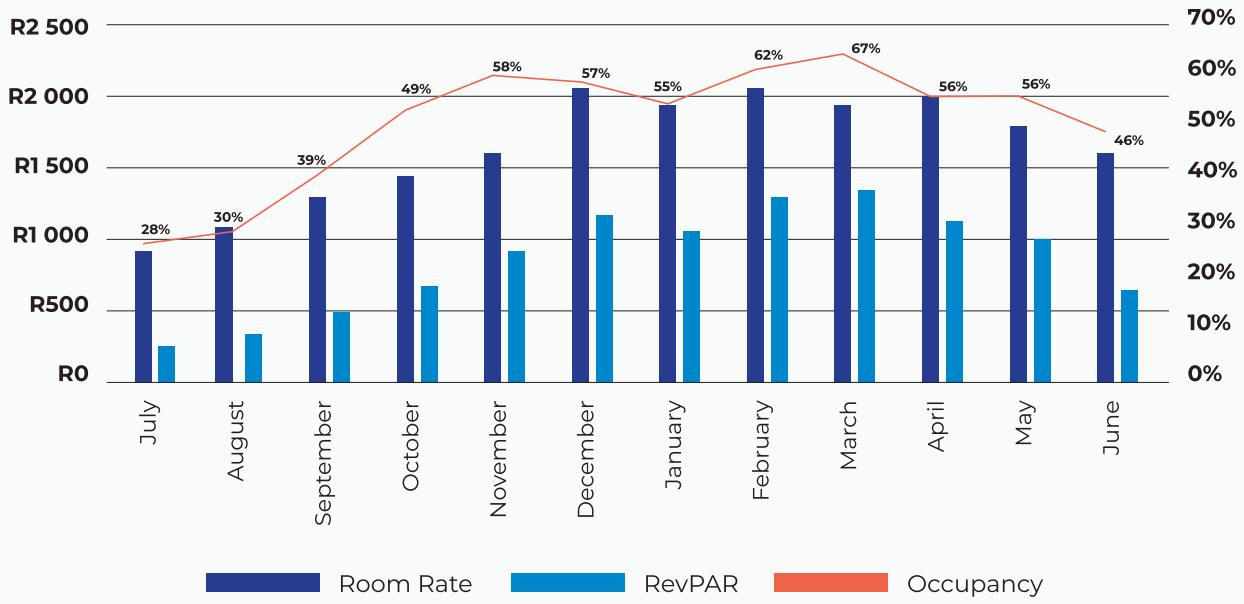
Top international key source markets, such as the USA, the UK and Germany, make up 16% of our total international arrivals and have recovered to pre-pandemic figures.



Source: South African Tourism Research Dashboard

ACCOMMODATION SECTOR

Occupancy has steadily increased, regularly exceeding 50% since November 2021 and 60% over the period February – March 2022.

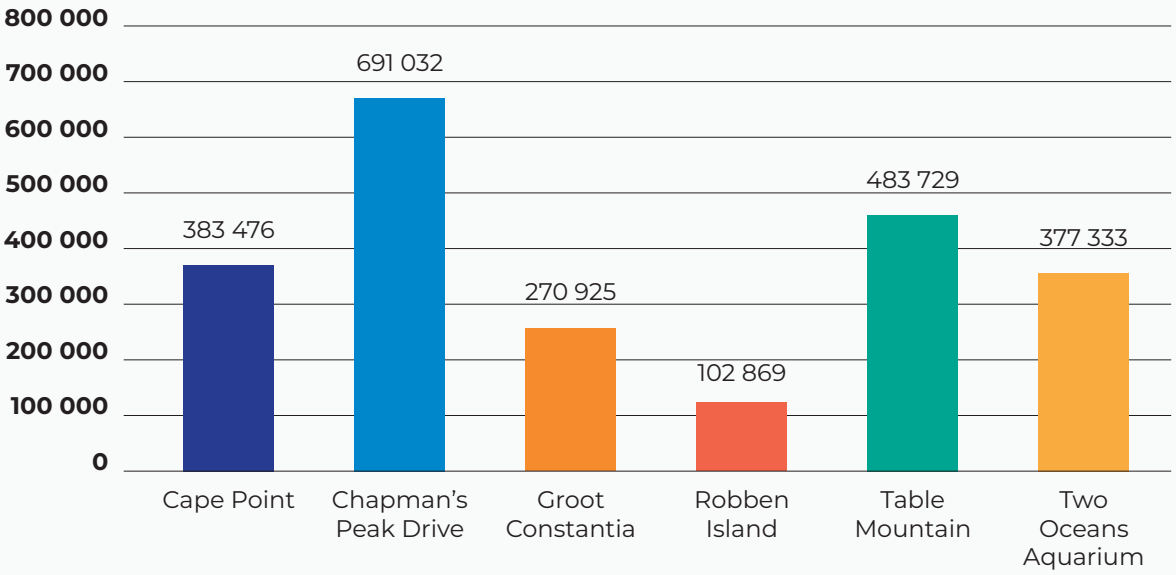


ACCOMMODATION METRICS 2021/22	ROOM RATE	ROOM RATE	OCCUPANCY
July	R893	R252	28%
August	R1 117	R330	30%
September	R1 298	R504	39%
October	R1 428	R706	49%
November	R1 585	R922	58%
December	R2 019	R1 155	57%
January	R1 929	R1 069	55%
February	R2 056	R1 275	62%
March	R1 972	R1 313	67%
April	R2 000	R1 123	56%
May	R1 806	R1 004	56%
June	R1 601	R728	46%

Source: Cape Town Tourism Accommodation Review and Forecast Report

TOURIST ATTRACTIONS

Despite varying recovery rates, all attractions reported a steady year-on-year improvement, post-pandemic.



YOY CHANGE	85%	17%	41%	259%	117%	63%

ATTRACTION FIGURES	LAST FISCAL YEAR 2020/21	THIS FISCAL YEAR 2021/22	YOY % CHANGE	RECOVERY %
Cape Point	207 224	383 476	85%	34%
Chapman's Peak Drive	589 290	691 032	17%	76%
Groot Constantia	192 554	270 925	41%	66%
Robben Island	28 653	102 869	259%	32%
Table Mountain	223 312	483 729	117%	42%
Two Ocean Aquarium	254 032	377 333	63%	77%

Note: The V&A Waterfront figures have been excluded. Since 2020, the V&A only shares the % change in footfall, replacing actual foot count.

Source: Attractions

CORPORATE SERVICES HIGHLIGHTS (1 JULY 2021 – 30 JUNE 2022)

FINANCE

BUDGET

The total expenditure incurred for the year amounts to R65.6 million, which is R970k or 1% lower than the R66.5 million budgeted.

FINANCIAL AUDIT

Our Annual Financial Statements ending 30 June 2022, will be signed off and we will receive an unqualified audit once again.

LIQUIDITY

We achieved a stronger liquidity ratio of 2.84:1, which was slightly higher than the previous year (2.42:1).

REPRIORITISING

To ensure budgeted targets were met, CTT effectively reprioritised income received from the City of Cape Town in line with the Service Agreement.

HUMAN RESOURCES

HEALTH AND SAFETY

During the COVID-19 pandemic, most of the OHS committee's time was spent keeping CTT teams safe while staff were at the office. Mandatory Occupational Health and Safety training was maintained throughout this period.

WORKFORCE MOVEMENTS

The headcount at the end of the financial year was 74 employees, which is higher than last financial year's headcount. During the 2021/22 financial year, we had 26 engagements and 15 terminations.

EMPLOYER BRANDING PROJECT

The Employer Branding task team rolled out several initiatives to attract job applicants, both internally and externally, to position Cape Town Tourism as the employer of choice.

EMPLOYMENT EQUITY

Following an EE survey which was sent to the CTT team, The Employment Equity report was submitted to the Department of Labour in December, achieving a 95% participation rate.

WORK-BASED LEARNING

We funded the stipends for two undergraduate TVET students and partially funded three students on a Discretionary Grant from False Bay College.

CULTURE SURVEY

A Culture Survey was conducted to monitor the organisation's internal climate and measure employee engagement.
The outcomes were positive compared to results from a comparative survey conducted two years ago.

B-BBEE CERTIFICATION

The two preferential elements on the BEE scorecard are Skills Development and Enterprise Supplier Development. We achieved a level 3 B-BBEE certification in line with our target set for 2021, by focusing our Training and Development spend on higher-level training for learnerships and students, and choosing service providers with higher compliance levels i.e., level 4 and up.

E-BUSINESS

CYBERSECURITY

A big focus over the past year was developing a Security and Compliance Centre designed to monitor our Cybersecurity. This initiative has been tremendously valuable, resulting in zero breaches for the year.

POPIA COMPLIANCE

We've adapted the POPIA Compliance requirements for monitoring dashboards. This supports our Data Classification and Management activities outlined in the Protection of Personal Information Act.

TOURISM MARKETING HIGHLIGHTS (1 JULY 2021 – 30 JUNE 2022)

LOCAL PROGRAMME HIGHLIGHTS

VACCINATION CAMPAIGN

On World Tourism Day we launched our 'Roll Up Your Sleeve' vaccination campaign, aimed at building visitor confidence, by promoting an increase in local vaccinations. We partnered with 15 local influencers/celebs who provided us with videos, giving reasons why they chose to vaccinate and encouraging the public to do so too. Vodacom came on board with 1GB of data and 60 minutes call time free to further incentivize vaccinations.

Cape Town Tourism throws weight behind vaccination drive

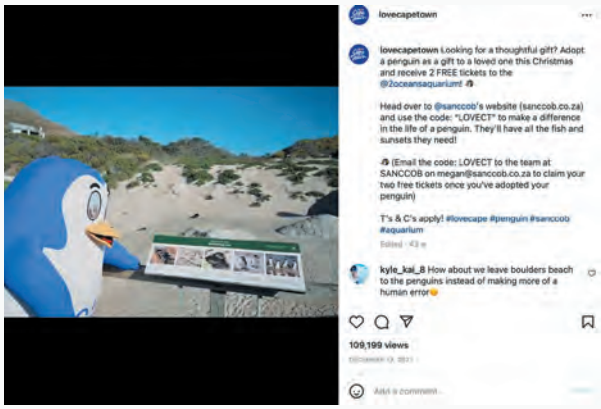
27 SEP 2021 SAVE | EMAIL | PRINT | PDF

In a bid to help drive up vaccination numbers so that other countries see the Mother City as safe and open for travel, Cape Town Tourism is partnering with a number of organisations to offer vaccinated individuals access to local attractions at reduced prices.

Results	AVEs: R8.5 million	Reach: 44.6 million people

FAMILY-FRIENDLY CAMPAIGN

Our partnership with SANCCOB and the Two Oceans Aquarium, saw the promotion of the #lovecapetown campaign in a fun and family-friendly way, showing our penguin mascots on a Netflix series called Penguin Town. The call to action was, if anyone adopted a Penguin from SANCCOB, as a gift for a loved one during the festive season, they received two free tickets to the Two Oceans Aquarium.



Results	Video Views: 67.8k	Social Reach: 94.8k

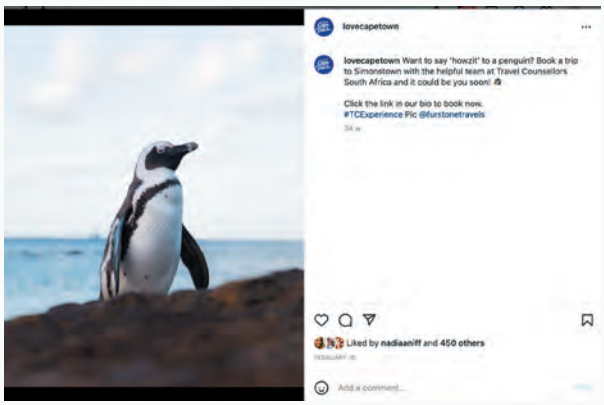
NEIGHBOURHOOD EXPERIENCE DEVELOPMENT TRAINING MANUAL

To support transformational tourism, we developed this manual to empower SMMEs to grow their business and increase market access. The in-person training also brought products in the same area together, packaging experiences in a way for neighbourhoods to become more viable as tourism destinations. The programme was developed and endorsed in partnership with Cape Peninsula University of Technology. After a successful pilot in Langa, the training manual was enhanced, updated, and formally launched in September 2022.

DOMESTIC PROGRAMME HIGHLIGHTS

DOMESTIC CONVERSION CAMPAIGNS

Our two domestic conversion campaigns concluded at the end of February 2022. Our partnership with Travel Counsellors ran from September 2021, and our other campaign in partnership with Travelstart, ran from December 2021 to offset the international travel bans over the festive season.



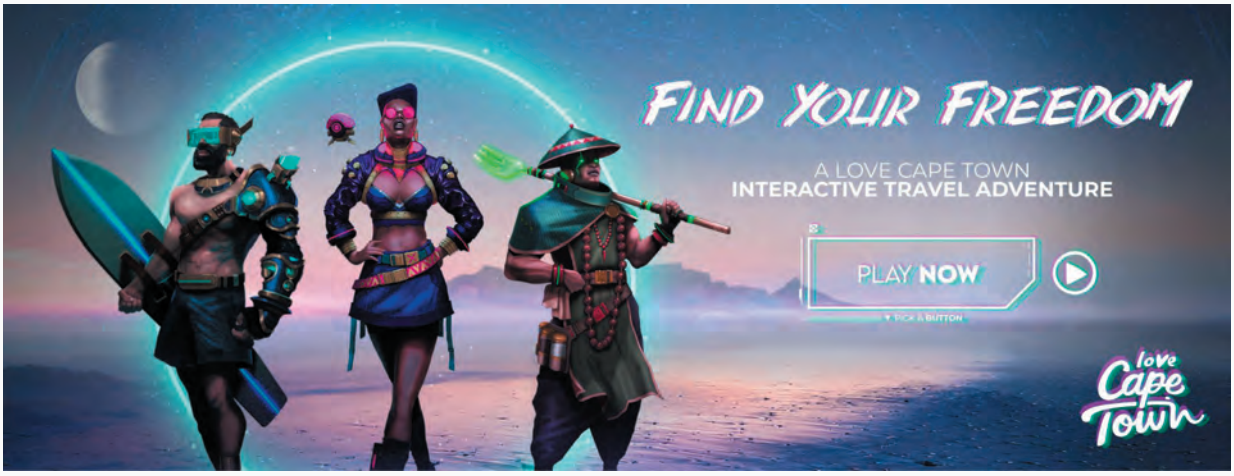
Travel Counsellors promoted domestic bookings to Cape Town through an incentive campaign with their independent travel agents, called Captivating Cape Town. Travelstart, Club Travel and SafariNow provided discounts, vouchers and subsidies across flight and accommodation bookings, which delivered pocket-friendly offerings for our domestic travellers.

Results	**Bookings: 38 030**	**Sales Value: R30.8 million**	**ROI: 24:1**

TACTICAL EASTER RADIO CAMPAIGN

We promoted our Pocket-Friendly offering through Jacaranda FM, East Coast Radio, and Heart 104.9 to drive domestic visitation over the Easter holiday period. The awareness campaign resulted in a potential reach of 5.8 million people.

INTERNATIONAL PROGRAMME HIGHLIGHTS



FIND YOUR FREEDOM INTERNATIONAL CAMPAIGN

Find Your Freedom (FYF) was the biggest international marketing programme we've executed in the history of CTT. It's centred around an interactive immersive gaming experience, with different in-and-out-of-destination marketing elements delivering a 'Big Bang' impact.

We rolled out our international PR plans in the SA, German, UK, and US markets generating over R90 million AVEs over the past 3 months, with a potential reach of over 900 million people.

Social media channels included Instagram, Facebook, Twitter, YouTube, and TikTok which were launched specifically for the Find Your Freedom campaign. Expedia was onboarded as our conversion partner, and targeted bookings from Germany, the UK, and the US for 6 months, ending in September 2022.

Brand partnerships included GoPro Global and Cape Union Mart, with shared content creation and product. We conducted extensive in-destination hosting, including 80 people across top-tier trade, media, and influencers. We also launched our FYF interactive airport activation to encourage travellers to engage with FYF, book member experiences and download itineraries from our website. Member deals were launched on our website as part of FYF, with a total of 2,271 vouchers downloaded at the end of June.

Results	**Media AVEs: R90 million**	**Campaign Value: R104 million**	**ROI: 8:1**

NEW AND UNIQUE PARTNERSHIPS

GOPRO PARTNERSHIP

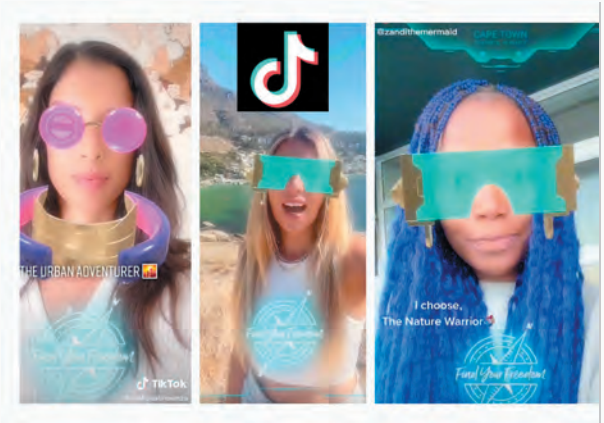
As part of our FYF campaign, we partnered with GoPro Global and hosted 6 of their most influential global ambassadors on a full itinerary for 8 days, where they were given the opportunity to tell our stories through their lens. The GoPro hosting week saw a 34.7% increase in engagement across our visitor-facing social media channels which in turn saw an increase in our reach by 168.7%. During their time in Cape Town, the GoPro ambassadors posted a collective total of 140 social clippings resulting in a potential combined reach of 875k across both Instagram and TikTok, in the UK, Germany and the US.

GERMAN AND UK PR AGENCY PARTNERS

We partnered with boutique agencies in Frankfurt and London to execute our FYF messaging on a project basis. All content was created locally and executed in our source markets by the local agency, resulting in excellent international reach during the campaign.

TIKTOK PARTNERSHIP

The Love Cape Town TikTok account launched on 27 April, aligned to FYF using a Branded Effect page and FYF Filter to engage users. We had 31.2 million 6 sec+ video views, 33k total engagement and 452 pieces of user-generated content during the two-month campaign. We had over 2,000 organic website referrals from the TikTok organic page.



VISITBERLIN PARTNERSHIP

At IMEX 2022 in Frankfurt, we signed our partnership agreement with visitBerlin which will see mutually beneficial activities rolled out during the next fiscal year.

TOURISM SERVICES FACTS AND FIGURES (1 JULY 2021 – 30 JUNE 2022)

NEW MEMBERS

We acquired a total of **157 new members** this financial year.

BUSINESS SUPPORT

The team launched the **Preferred Service Provider Programme** or PSP where 83 service providers and members were brought together to support members by creating cost-saving opportunities through economies of scale.

The team used every opportunity to engage with members one-on-one. A total of 26 **Workshops and Networking Sessions** were hosted for members with 1,377 participants in attendance. There were 2 Ekasi sessions hosted in Langa and Phillipi Village Precinct attended by a total of 66 people. These sessions included high-profile speakers from SA Tourism, Nedbank, Hollard Insurance and SEDA.

MEMBER SUPPORT

The **'Free' or Ubuntu offering**, provided tourism products with the opportunity to keep their accreditation with CTT, while receiving limited benefits. The opportunity ran from May 2021 to June 2022, with 362 products taking up the offer.

Our membership model is regarded as world-class when compared to other member organisations globally. We realise, however, that budgets remain tight for most members who are very price-sensitive when it comes to membership fees at this stage. The team, therefore, undertook the development of a **New Membership Structure** which recognises the current financial position of members. This new structure will be launched in October 2022 and aims to 'Simplify and Amplify' engagement with members from the start of the onboarding process, throughout the utilisation of services.

Mzansi Restaurant in Langa was identified as the new **Board Development Fund (BDF)** recipient and was recognised at our AGM in October 2021. The owner received R75,000 in funding and mentorship from one of our board members. We also successfully facilitated access for Mzansi Restaurant and Khayelitsha Tours to the Netherlands PUM 8-week International Virtual Mentorship Programme. The value of the programme is estimated at R65,000 but was free to the members.

VISITOR EXPERIENCE

VISITOR SERVICES

The Visitor Experience team interacted with 127,235 visitors, compared to 45,778 the previous year. The **Bookings Conversion** rate also increased from 37% to 71%.

The team provided assistance and support to hundreds of visitors who were stranded at Cape Town International Airport at very short notice due to the announcement of the Omicron variant, which saw immediate travel lockdown for certain countries. Special assistance was provided to visitors from 26 November until 2 December 2021, with VEC opening hours extended to 23h00.

The easing of lockdown restrictions and travel regulations allowed the mobile team to attend more and larger events. The team attended 39 events, 17 more than the previous year. These included the Two Oceans Marathon, ABSA Run Your City Expo and Race, Africa Travel Indaba and the Bo-Kaap Open Air Dining Experience amongst others.

Our Contact Centre dealt with 5,498 enquiries, most of which were related to COVID regulations and protocols, testing and vaccination sites, airline operations, and attraction and activity rates.

YOUTH X / COMMUNITY

The Youth and School's Programme focused on the theme **'Igniting Your Passion'.** In partnership with members, we visited 6 disadvantaged schools with 677 Grade 10, 11 and 12 learners raising awareness of the opportunities in the tourism industry.

In addition, 39 teachers participated in a **Lesson Plan Development Think Tank** supported by selected tourism product owners and stakeholders. The Think Tank saw teachers engage directly with experts in the tourism industry and from this lesson plans were developed in line with the following quarter's curriculum to make the subject matter more realistic and relevant.

PARTNERSHIPS

STRATEGIC PARTNER

vodacom

EXECUTIVE PARTNER: PLATINUM

AQUILA PRIVATE GAME RESERVE SAFARI & SPA

EXECUTIVE PARTNERS: GOLD

V&A WATERFRONT CAPE TOWN

TABLE MOUNTAIN AERIAL CABLEWAY

EXECUTIVE PARTNERS: SILVER

GROOT CONSTANTIA

Southern Sun

msc