DATA AND INSIGHTS | APRIL 2018

HIGHLIGHTS

MONTHLY DASHBOARDS

- Industry Snapshot
- ForwardKeys Report
The result of the **decrease in bookings since January** has emerged significantly this month across all sectors with a decrease in arrivals, occupancy and feet through attractions when compared to the same period last year.

- Cape Town International Airport experienced a **total decrease of -4% in arrivals**, a **0% increase in international arrivals** and a **-5% decrease in domestic arrivals**.

- The accommodation sector has reported a decline in occupancy, experiencing a **decline in occupancy of -10%**. The **average room rate** has also **decreased this month by -17%** and **RevPar has decreased by -29%**.

- Most attractions experienced a **year-on-year decline** for the month of April, with only Groot Constantia reporting an increase year-on-year.

- **Looking forward**, total arrivals is forecast to decline by -8% year-on-year for the next three months based on arrivals currently on the book in ForwardKeys. International arrivals are forecast to decrease by -7%, whereas domestic arrivals are forecast to decrease by -16%.

- The **Visitor Profile Snapshot** will be issued as a quarterly dashboard for April to June 2018. Lower foot traffic in our Visitor Information Centre (VIC) network during winter months occasionally necessitates publishing a quarterly rather than monthly report to work with a more robust sample.
CAPE TOWN INDUSTRY SNAPSHOT
APRIL 2018

TOURISM INDUSTRY SNAPSHOT

01 CAPE TOWN INTERNATIONAL AIRPORT ARRIVAL FIGURES: ¹

ACTUAL
- DOMESTIC ARRIVALS
- REGIONAL ARRIVALS
- INTERNATIONAL ARRIVALS

TOTAL: 431,510

CAPE TOWN ACCOMMODATION SECTOR PERFORMANCE: ²

- AVERAGE OCCUPANCY RATE: 59.4% -10%
- AVERAGE ROOM RATE: R1,668 -17%
- REVENUE PER AVAILABLE ROOM: R991 -29%

TOP TOURISM ATTRACTIONS’ PERFORMANCE: ³

REFERENCE: ¹ ACSA, Cape Town International Airport Arrival Figures, April 2018
² Horwath HTL, Accommodation Performance Review & Forecast Report, April 2018
³ Cape Town Tourism, Tourism Attraction Performance Survey, April 2018

NOTE: As of November 2017, Kirstenbosch Gardens has included concert attendance in reported visitor figures

GLOSSARY: ACSA: AIRPORTS COMPANY SOUTH AFRICA • YOY: YEAR ON YEAR
CAPE TOWN FORWARDKEYS
APRIL 2018

01 6 MONTH FUTURE ARRIVALS TO CAPE TOWN

02 3 MONTH FUTURE ARRIVALS: MAY – JUL 2018
TOTAL BOOKINGS = 96 122  ▲ YOY -8%

03 LENGTH OF STAY
3 MONTH FUTURE ARRIVALS: MAY – JUL 2018

REFERENCE: Forward Keys: Aggregated future flight reservation data. The information is correct as of the date of publication and is subject to change.