



DATA AND INSIGHTS | APRIL 2018

HIGHLIGHTS

MONTHLY DASHBOARDS

- Industry Snapshot
- ForwardKeys Report

HIGHLIGHTS

APRIL 2018

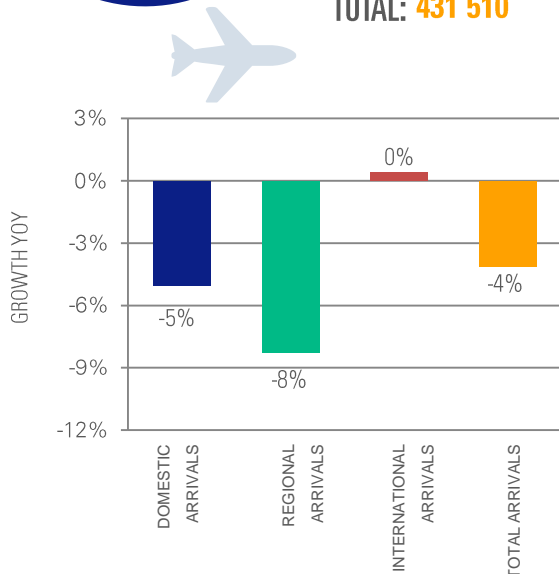
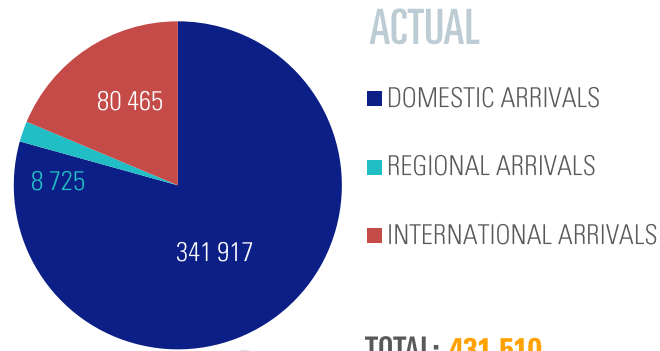
- The result of the **decrease in bookings since January** has emerged significantly this month across all sectors with a decrease in arrivals, occupancy and feet through attractions when compared to the same period last year.
- Cape Town International Airport experienced a **total decrease of -4% in 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

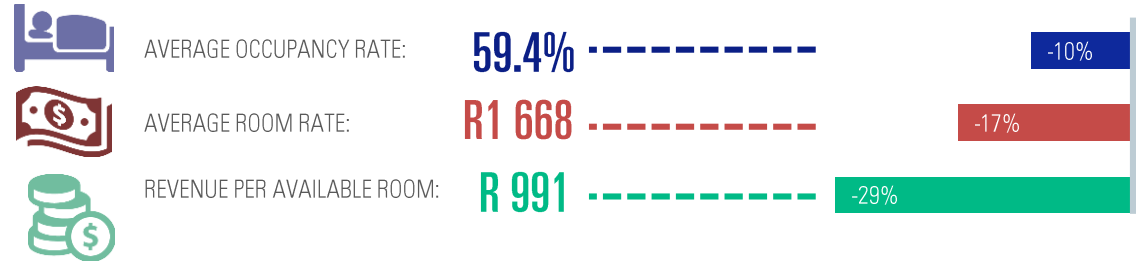
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TOURISM INDUSTRY SNAPSHOT

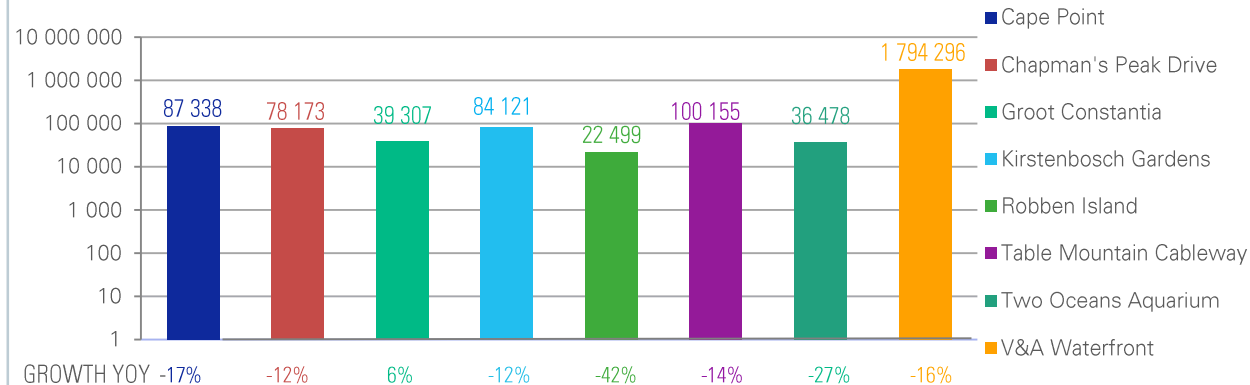
01 CAPE TOWN INTERNATIONAL AIRPORT ARRIVAL FIGURES: ¹



02 CAPE TOWN ACCOMMODATION SECTOR PERFORMANCE: ²



03 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

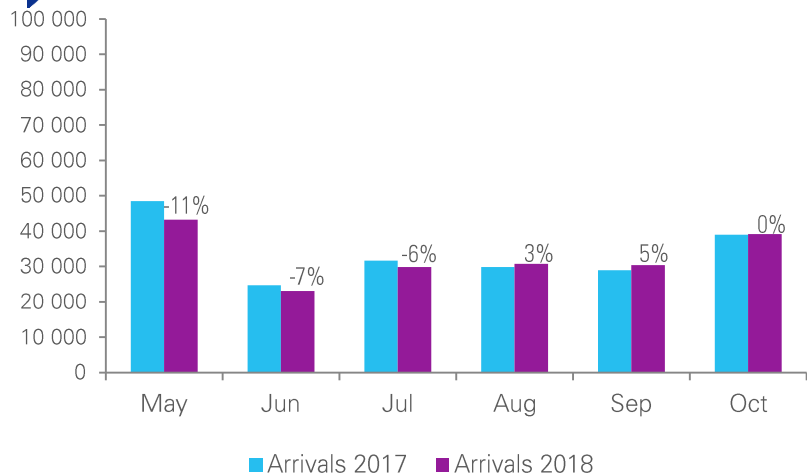


CAPE TOWN FORWARDKEYS

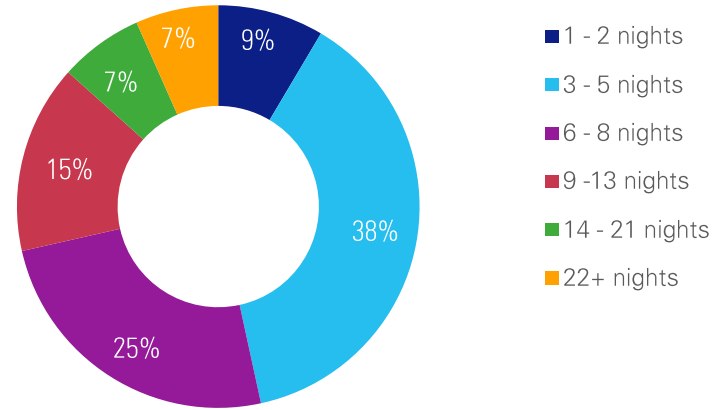
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01 6 MONTH FUTURE ARRIVALS TO CAPE TOWN



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

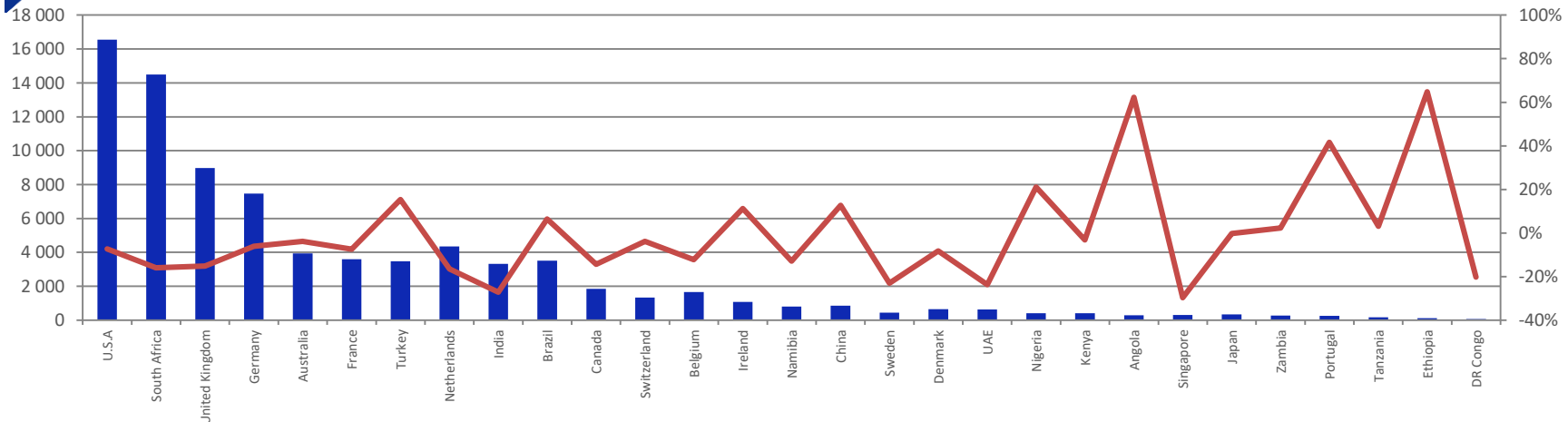


02 3 MONTH FUTURE ARRIVALS: MAY – JUL 2018

TOTAL BOOKINGS = 96 122

↑ YOY -8%

TOTAL YOY GROWTH



REFERENCE:

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