

DATA AND INSIGHTS

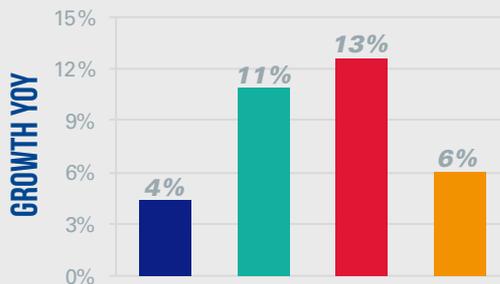
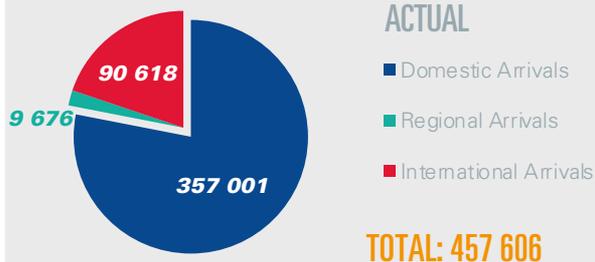
APRIL 2019

Cape
Town
TOURISM

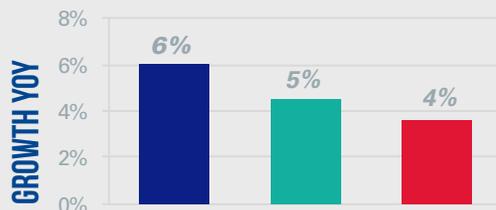
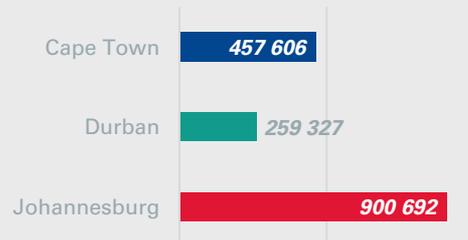
INDUSTRY SNAPSHOT

APRIL 2019

CAPE TOWN INTERNATIONAL AIRPORT ARRIVAL FIGURES:



TOTAL ARRIVALS CITY AIRPORTS:



HIGHLIGHTS:

6% INCREASE IN TOTAL ARRIVALS

Cape Town international arrivals increased by 13% and 4% increase in domestic arrivals.

Arrivals to King Shaka increased by 5% and arrivals to OR Tambo increased by 4%.

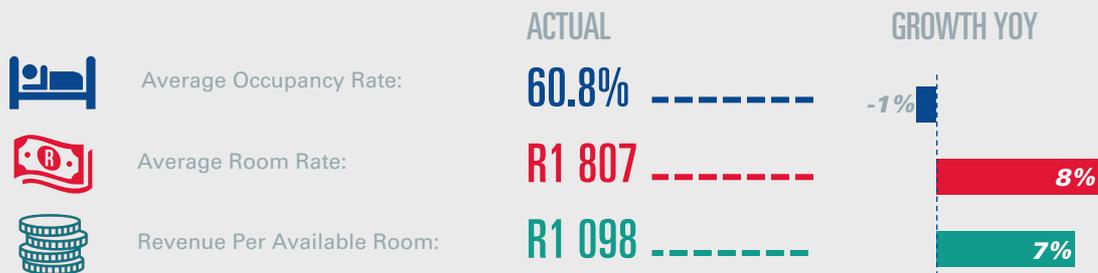
REFERENCE: ACSA, Cape Town International Airport Arrival Figures, April 2019

GLOSSARY: ACSA: Airport Company South Africa. YOY: Year on Year.

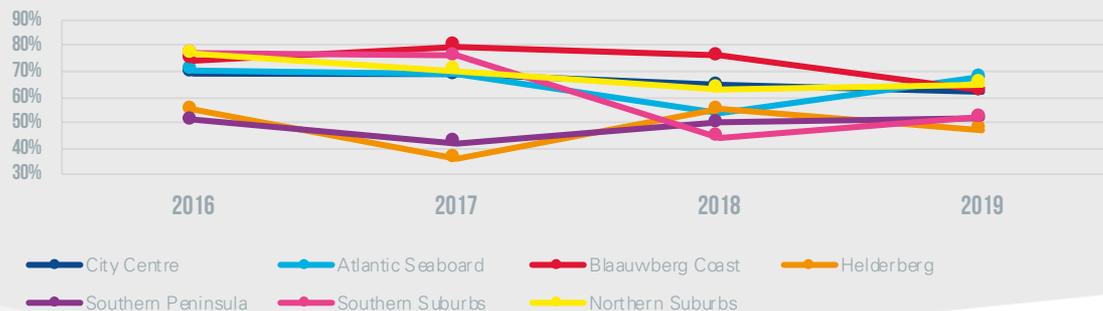
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APRIL 2019

CAPE TOWN ACCOMMODATION SECTOR PERFORMANCE:



OCCUPANCY RATE DESTINATIONS



HIGHLIGHTS:

DECLINE IN OCCUPANCY

The accommodation sector has reported a decline in occupancy of -1%.

The Average Room Rate increased by 8% and RevPar increased by 7%.

The Average Room Rate increased from R1 669 reported last year. *

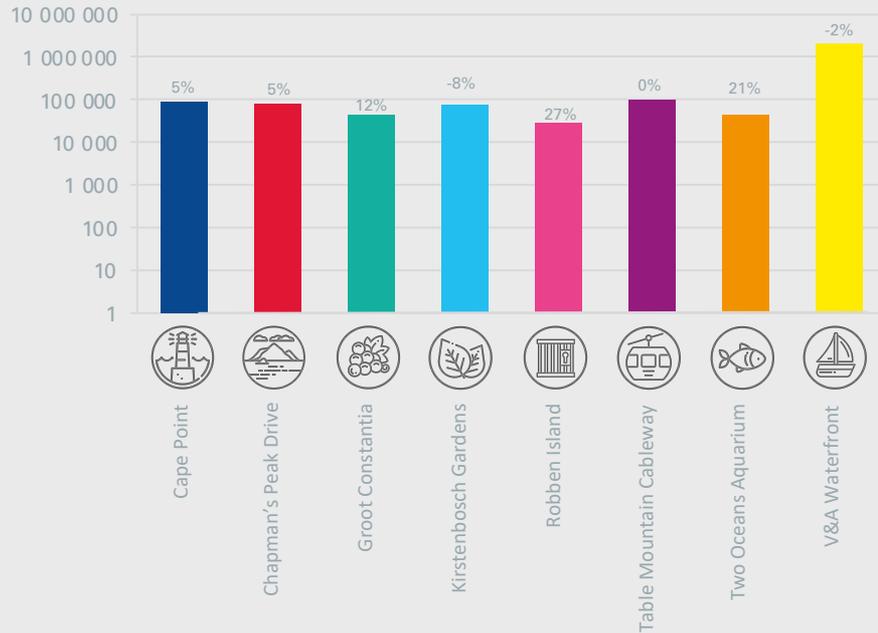
The Atlantic Seaboard is the only area that has experienced a double digit year-on-year increase in occupancy.

* This sample represents 91 230 available room nights

INDUSTRY SNAPSHOT

APRIL 2019

TOURISM ATTRACTIONS' PERFORMANCE:



HIGHLIGHTS:

With the exception of Kirstenbosch Gardens and V&A Waterfront, attractions reported a year-on-year increase in visitors.

Those with year-on-year decrease is due to the timing of the school holidays and economic pressure influencing the domestic market.

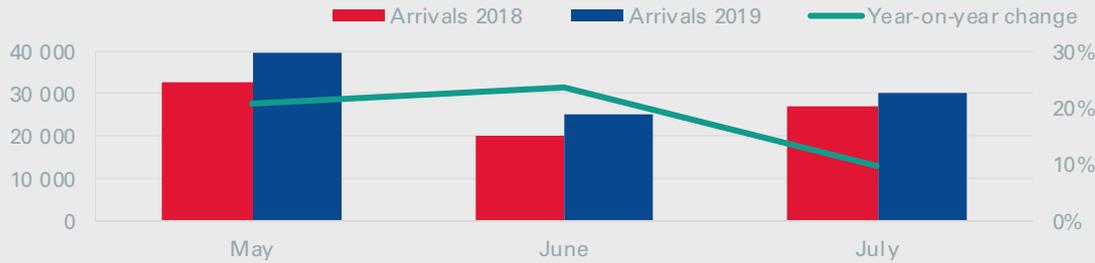
Those with year-on-year increase cited that it was largely due to the recovery of the impact of the drought.

FORWARDKEYS

APRIL 2019

INTERNATIONAL 3 MONTH FORECAST ARRIVALS MAY-JUL 2019

TOTAL BOOKINGS = 95 086  YOY 18%



TOP 10 SOURCE MARKETS 3 MONTH FORECAST ARRIVALS MAY-JUL 2019

TOTAL BOOKINGS = 66 901  YOY 17%



HIGHLIGHTS:

LOOKING FORWARD

Total international arrivals is forecast to increase by 18% over the next three months based on arrivals currently on the book in ForwardKeys.

The top 10 international arrivals are forecast to increase by 17% over the next three months.

India is a new entrant into the top 10 international source with massive forecasted year-on-year growth.

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

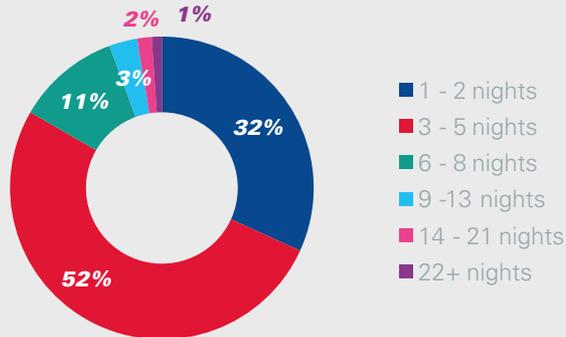
FORWARDKEYS APRIL 2019

DOMESTIC 3 MONTH FORECAST ARRIVALS MAY-JUL 2019

TOTAL BOOKINGS = 14 479  YOY 1%



DOMESTIC LENGTH OF STAY AT MAIN POINT OF INTEREST: 3 MONTH FUTURE ARRIVALS MAY-JUL 2019



HIGHLIGHTS:

LOOKING FORWARD

Total domestic arrivals is forecast to increase by 1% over the next three months based on arrivals currently on the book in ForwardKeys.

52% of domestic travellers will spend between 3-5 nights at their main point of interest, Cape Town.

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