





tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

APRIL-JUNE 2019

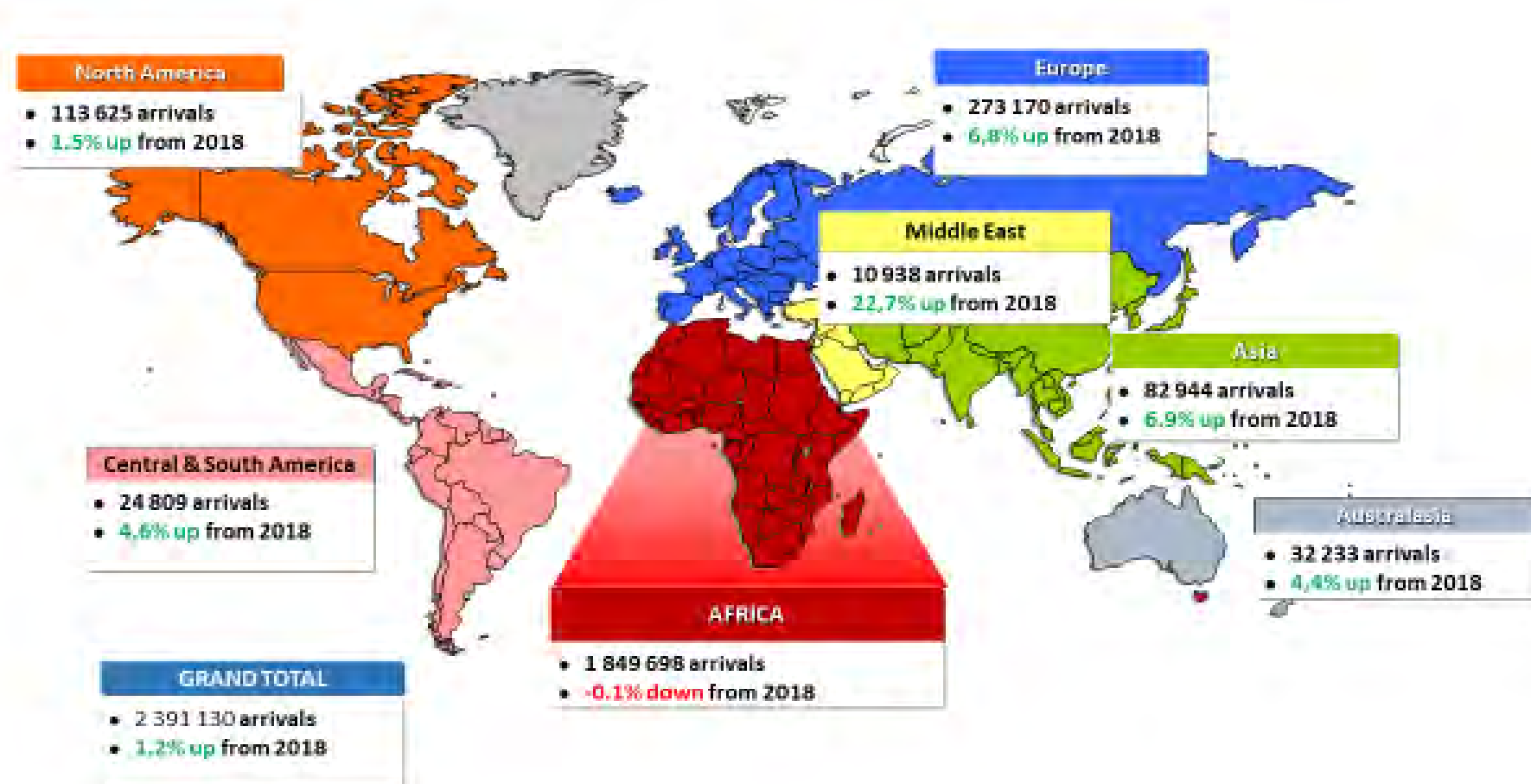
TOURISM QUARTERLY PERFORMANCE REPORT

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SECTION 1: SOUTH AFRICAN INBOUND TOURISM PERFORMANCE: APRIL-JUNE 2019 COMPARED TO APRIL-JUNE 2018

Figure 1: Total Tourist Arrivals by Region Apr-Jun 2019 vs. Apr-Jun 2018



Source: Stats SA, Tourism and Migration, June 2019.

SOUTH AFRICAN INBOUND TOURISM PERFORMANCE: APRIL-JUNE 2019 COMPARED TO APRIL-JUNE 2018

Arrivals for the period April-June 2019 compared to the same period in 2018 are indicated in Table 1. Total tourist arrivals (2 391 130) went up by 1.2% for the period April-June 2019 compared to arrivals recorded during the same period in 2018 (2 363 598). Total tourist arrivals from the overseas market increased by 5.7% (28 774), which was influenced by an increase recorded in the Middle East (22.7%), Asia (6.9%), Europe (6.8%) and Central and South America (4.6%), Australasia (4.4%) and North America with 1.5%. Most countries in the Middle East had an increase in tourist arrivals and Saudi Arabia recorded the highest increase of 38.6% (763). The increase in the growth recorded in Europe was influenced by most of the countries recording an increase in the region, with Spain experiencing the highest growth of 14.6% (1 189). The increase in Central and South America was driven by an increase recorded in tourist arrivals from most countries from this region with Mexico recording the highest growth of 21.3% (243). Compared to other regions, Australasia and North America had a growth of 4.4% (1 354) and 1.5% (1 636) respectively for the period under review. The growth from Asia was driven by an increase of 75.6% (1 533) of tourist arrivals from Malaysia. Tourist arrivals from Africa declined by -0.1% (-1 631) during the same period under review.

Table 1: Total Tourist Arrivals by Region Apr-Jun 2019 vs. Apr-Jun 2018

REGION	Apr-Jun 2019	Apr-Jun 2018	Diff	% Diff
EUROPE	273 170	255 879	17 291	6,8%
NORTH AMERICA	113 625	111 989	1 636	1,5%
CENTRAL & SOUTH AMERICA	24 809	23 726	1 083	4,6%
AUSTRALASIA	32 233	30 879	1 354	4,4%
MIDDLE EAST	10 938	8 913	2 025	22,7%
ASIA	82 944	77 559	5 385	6,9%
TOTAL OVERSEAS	537 719	508 945	28 774	5,7%
TOTAL AFRICA	1 849 698	1 851 329	-1 631	-0,1%
Unspecified	3 713	3 324	389	11,7%
GRAND TOTAL	2 391 130	2 363 598	27 532	1,2%

Source: Stats SA: Tourism and Migration report: June 2019

Table 2 gives the rankings of the top ten African source markets for the period April-June 2019 compared to April-June 2018. All of the top ten African markets remained at the same position for the period under review. Most countries from the top ten African source markets recorded a decrease in tourist arrivals during this period except for Botswana (22.3%), Swaziland (8.8%) Angola (3.1%) and

Zimbabwe (2.6%). Botswana experienced the highest growth of 22.3%, which translates to additional 32 357 tourist arrivals from this country during the period under review.

Table 2: South Africa's Top 10 African Source Markets: Apr-Jun 2019 vs. Apr-Jun 2018

COUNTRY	RANK: Apr-Jun 2019	Tourist Arrivals Apr-Jun 2019	RANK: Apr-Jun 2018	Tourist Arrivals Apr-Jun 2018	% Change from Apr-Jun 2018 to Apr-Jun 2019
Zimbabwe	1	532 472	1	519 137	2,6%
Lesotho	2	394 371	2	439 488	-10,3%
Mozambique	3	311 546	3	329 106	-5,3%
Swaziland	4	230 270	4	211 663	8,8%
Botswana	5	177 466	5	145 109	22,3%
Namibia	6	47 089	6	47 276	-0,4%
Malawi	7	43 112	7	43 415	-0,7%
Zambia	8	37 482	8	40 683	-7,9%
Angola	9	13 755	9	13 343	3,1%
Nigeria	10	11 190	10	12 328	-9,2%

Source: Stats SA: Tourism and Migration report: June 2019

Table 3 shows the rankings of the top ten overseas source markets. Comparing April-June 2019 with April-June 2018, most top 10 overseas markets recorded an increase in tourist arrivals except for France (-10.1%), Netherlands (-1.9%) and Canada (-0.1%). Despite this decline, all of the top ten overseas markets remained in the same position for the period under review. USA remains the main source market from overseas. UK however experienced the highest growth of 13.2% which translates to additional 9 463 tourist arrivals from this country during the period under review.

Table 3: South Africa's Top 10 Overseas Source Markets: Apr-Jun 2019 vs. Apr-Jun 2018

COUNTRY	RANK: Apr-Jun 2019	Tourist Arrivals Apr-Jun 2019	RANK: Apr-Jun 2018	Tourist Arrivals Apr-Jun 2018	% Change from Apr-Jun 2018 to Apr-Jun 2019
USA	1	99 949	1	98 299	1,7%
UK	2	81 300	2	71 837	13,2%
Germany	3	47 398	3	42 751	10,9%
France	4	31 936	4	35 527	-10,1%
India	5	31 087	5	28 587	8,7%
Australia	6	28 504	6	27 235	4,7%
Netherlands	7	21 914	7	22 346	-1,9%
China	8	20 692	8	20 681	0,1%
Brazil	9	16 328	9	15 539	5,1%
Canada	10	13 676	10	13 690	-0,1%

Source: Stats SA: Tourism and Migration report: June 2019

SECTION 2: PERFORMANCE OF OTHER SOUTH AFRICAN TOURISM RELATED INDUSTRIES (APR-JUN 2019)

1. ACCOMMODATION INDUSTRY

ACCOMMODATION INDUSTRY INCOME: APR-JUN 2019 COMPARED TO APR-JUN 2018

The total income from accommodation went up from R5 297.7 million in Apr-Jun 2018 to R5 593.7 million in Apr-Jun 2019 which was an increase of about 5.6% as indicated in Table 4 below. Compared to the previous quarter, Caravan parks and Camping sites had the highest increase of about 29.8% in income followed by Hotels (3.6%). The other accommodation establishments also had a significant increase of 9.5%. Other category includes lodges, bed-and-breakfast establishments, self-catering establishments and 'other' establishments not classified. Hotel establishments received the highest share (63.9%) of income received during this period.

Table 4: Income from accommodation: Apr-Jun 2019 compared to Apr-Jun 2018

Type of Accommodation	Apr-Jun 2018	Apr-Jun 2019	% Change	% share
Hotels (R million)	R3 451,5	R3 575,9	3,6%	63,9%
Caravan parks and camping sites (R million)	R67,4	R87,5	29,8%	1,6%
Guest houses and guest farms (R million)	R266,1	R274,2	3,0%	4,9%
Other accommodation (R million)	R1 512,7	R1 656,1	9,5%	29,6%
Total Industry	R5 297,7	R5 593,7	5,6%	100%

Source: Stats SA: Accommodation data cuts, September 2019

ACCOMMODATION INDUSTRY OCCUPANCY RATE: APR-JUN 2019 COMPARED TO APR-JUN 2018

The average occupancy rates for Apr-Jun 2019 compared to Apr-Jun 2018 is provided in Table 5 below. Using seasonally adjusted figures, total industry average occupancy rate for the period Apr-Jun 2019 was 51.6% which was a slight decline compared to the same period in 2018 (51.7%). Hotels, Caravan parks and camping sites and other accommodation types experienced a decline in average occupancy rates except for guest houses and guest farms for the period under review.

Table 5: Occupancy rate of accommodation industry: Apr-Jun 2019 compared to Apr-Jun 2018 (Seasonally adjusted figures)

Seasonally Adjusted			
Occupancy Rate:	Apr-Jun 2018	Apr-Jun 2019	Change
Hotels	51,5	51,1	↓
Caravan parks and camping sites	35,6	35,3	↓
Guest houses and guest farms	35,7	40,4	↑
Other accommodation	61,2	61,1	↓
Total Industry	51,7	51,6	↓

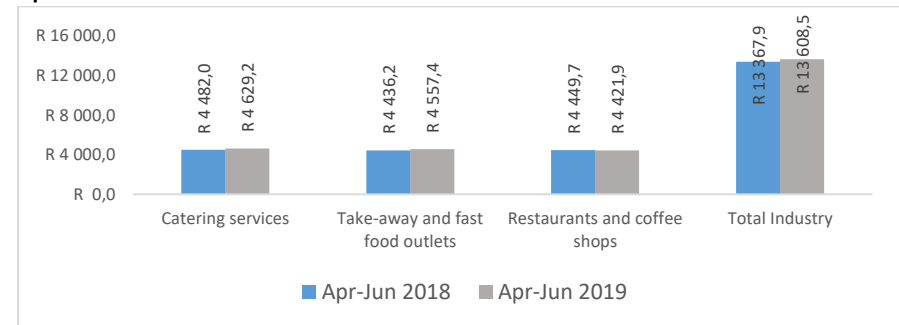
Source: Stats SA: Accommodation data cuts, September 2019

2. FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: APR-JUN 2019 COMPARED TO APR-JUN 2018

The results in Figure 2 below indicate that the total income of the food and beverages industry was about R 13 608.5 million in Apr-Jun 2019 which was an increase of 1.8% when compared to income of about R 13 367.9 million for Apr-Jun 2018. Catering services contributed about 33.5% to total income during Apr-Jun 2018 and 34.0% during Apr-Jun 2019. Restaurants and coffee shops contribution was about 33.3% in Apr-Jun 2018 which remained almost flat in Apr-Jun 2019 (32.5%).

Figure 2: Total income by type of food and beverage industry: Apr-Jun 2019 compared to Apr-Jun 2018



Type of food and beverage industry	% Change	Apr-Jun 2018 % Share	Apr-Jun 2019 % Share
Restaurants and coffee shops	-0.6%	33,3%	32,5%
Take-away and fast food outlets	2.7%	33,2%	33,5%
Catering services	3.3%	33,5%	34,0%
Total industry	1.8%	100%	100%

Source: Stats SA: Food & Beverage data cuts, September 2019

SECTION 3: SOUTH AFRICAN RELATED INDUSTRIES TOURISM PERFORMANCE CONT... (APR-JUN 2019)

3. AVIATION

PASSENGER ARRIVALS MOVEMENT: APR-JUN 2019 COMPARED TO APR-JUN 2018

Table 6 below indicates the total passenger arrivals in Airports Company South Africa (ACSA) airports during Apr-Jun 2019 compared to Apr-Jun 2018. Total passenger arrivals increased by 3.6% moving from 4 869 714 in Apr-Jun 2018 to 5 045 719 in Apr-Jun 2019. International passenger arrivals increased by 3.9% during the same period under review. Passengers arriving on unscheduled flights had a decrease of about -13.9% (-2 171) during the period under review.

Table 6: Arriving passengers to South Africa by region: Apr-Jun 2019 compared to Apr-Jun 18

Arriving Passengers	Apr-Jun 2018	Apr-Jun 2019	Difference	% Change
International	1 283 775	1 333 469	49 694	3,9%
Regional	133 668	135 838	2 170	1,6%
Domestic	3 436 671	3 562 983	126 312	3,7%
Unscheduled	15 600	13 429	-2 171	-13,9%
Total	4 869 714	5 045 719	176 005	3,6%

Source: ACSA data, September 2019

PASSENGER DEPARTURE MOVEMENTS: APR-JUN 2019 COMPARED TO APR-JUN 2018

Table 7 below shows the total passengers departing from ACSA airports during the period Apr-Jun 2019 compared to Apr-Jun 2018. Total passengers departing increased by 3.0% in Apr-Jun 2019 compared to Apr-Jun 2018. Domestic, international and regional passengers departing from different ACSA airports recorded an increase in Apr-Jun 2019 compared to same period last year. Passengers departing on unscheduled flights had a decrease of about -18.5% (-3 005) during the period under review.

Table 7: Departing passengers from South Africa by region: Apr-Jun 2019 compared to Apr-Jun 18

Departing Passengers	Apr-Jun 2018	Apr-Jun 2019	Difference	% Change
International	1 424 431	1 446 831	22 400	1,6%
Regional	135 658	139 987	4 329	3,2%
Domestic	3 451 836	3 581 435	129 599	3,8%
Unscheduled	16 217	13 212	-3 005	-18,5%
Total	5 028 142	5 181 465	153 323	3,0%

Source: ACSA data, September 2019

4. DIRECT TOURISM EMPLOYMENT ESTIMATES

Direct Contribution of Tourism to Employment

The data presented in this section uses Stats SA's Tourism Satellite Account 2017 preliminary tourism employment ratios to estimate direct contribution of tourism to employment for the period April to June 2019 using the Quarterly Labour Force Survey data. An estimated 4.4% of South African jobs were directly created through tourism activities during April to June 2019. Table 8 below gives data comparison between two periods: Apr-Jun 2019 and Apr-Jun 2018. The table indicates an estimated decline of -3.2% in total direct jobs created by the tourism sector, which resulted in lesser jobs (-23 937) created between the period Apr-Jun 2019 compared to Apr-Jun 2018.

Table 8: Direct Tourism employment: Apr-Jun 2019 compared to Apr-Jun 2018

	2018 Q2	2019 Q2	Difference	% Growth
Tourism Employment	745 399	721 462	-23 937	-3,2%

Source: Calculated from the Q2 2019 Labour Force Survey data and 2017 TSA Ratios.

Share of Tourism employment by gender

Estimates of tourism employment by gender for the period Apr-Jun 2019 compared to Apr-Jun 2018 is indicated in Table 9 below. For both quarters, there were more males directly employed in the tourism sector than females. The share of women directly employed in the tourism sector for the period Apr-Jun 2019 declined from 40.2% to 38.5% during the period under review.

Table 9: Direct Tourism employment by Gender: Apr-Jun 2019 compared to Apr-Jun 2018

Period	Male	Female (% Share)
Apr-Jun 2018		40,2%
Apr-Jun 2019		38,5%

Source: Calculated from the Q2 2019 Labour Force Survey data and 2017 TSA Ratios

Table 10: Share of tourism employment by type of industry: Apr-Jun 2019

Tourism Industry	% Share
Road Passenger transport	31.8%
Food and Beverage	20.3%
Accommodation	16.4%
Retail trade	16.1%
Other industries (railway passenger transport, water passenger transport, air passenger transport, transport equipment rental, travel agencies, cultural services, sporting and other recreation services)	15.5%

The figures in Table 10 indicate that almost a third of tourism jobs for the period Apr-Jun 2019 were in the road passenger transport industry (31.82%), followed by the food and beverage industry (20.3%).

Source: Calculated from the Q2 2019 Labour Force Survey data and 2017 TSA Ratios









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TOP FIVE OVERSEAS SOURCE MARKETS

Country	Arrivals
USA 	99 949 1.7% up from 2018 
UK 	81 300 13.2% up from 2018 
Germany 	47 398 10.9% up from 2018 
France 	31 936 -10.9% down from 2018 
Netherlands 	31 087 8.7% up from 2018 

TOP FIVE AFRICA SOURCE MARKETS

Country	Arrivals
Zimbabwe 	532 472 2.6% up from 2018 
Lesotho 	394 371 -10.3% down from 2018 
Mozambique 	311 546 -5.3% down from 2018 
Swaziland 	230 270 8.8% up from 2018 
Botswana 	177 466 22.3% up from 2018 

ANNEXURE 2: GLOBAL INBOUND TOURISM PERFORMANCE: APRIL-JUNE 2019 COMPARED TO APRIL-JUNE 2018

GLOBAL INTERNATIONAL TOURIST ARRIVALS BY REGIONS

Figure 1: Percentage growth of global tourist arrivals by region: APR-JUN 2019 COMPARED TO APR-JUN 2018



UNWTO has only released percentage growth by region for the quarter: Apr-Jun 2019 compared to Apr-Jun 2018 and absolute figures have not yet been released. International tourist arrivals had a growth of 5.3% during Apr-Jun 2019 compared to the same period last year. Comparing Apr-Jun 2019 to Apr-Jun 2018, Middle East had the highest increase (8.8%) followed by Asia & the Pacific (6.4%), Europe (5.0%), Africa (4.7%), North America (3.9%) and South America with 0.9%.