





tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM QUARTERLY PERFORMANCE REPORT

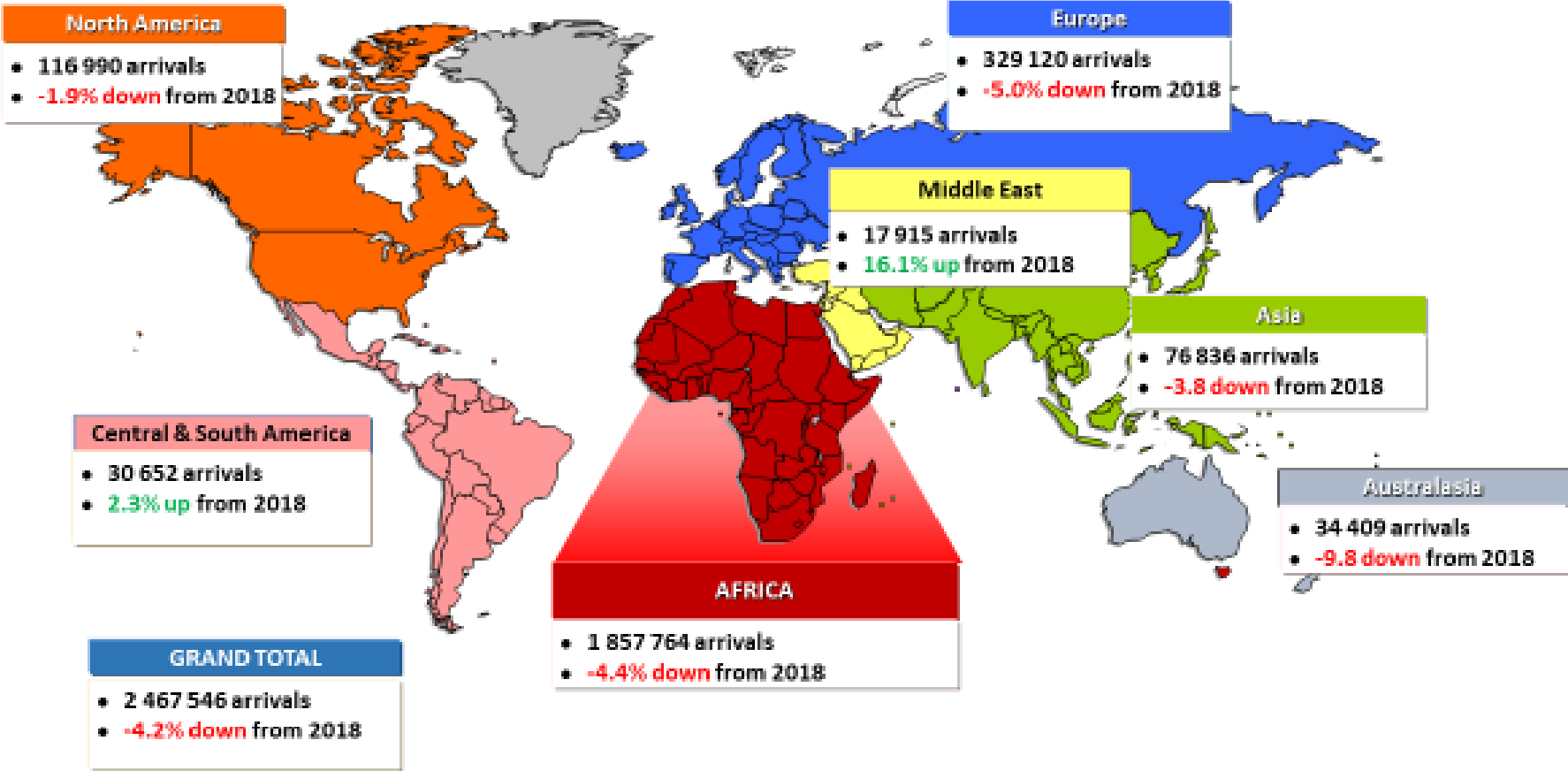
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SECTION 1: SOUTH AFRICAN INBOUND TOURISM PERFORMANCE: JULY-SEPTEMBER 2019 COMPARED TO JULY-SEPTEMBER 2018

Figure 1: Total Tourist Arrivals by Region Jul-Sept 2019 vs. Jul-Sept 2018



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

SECTION 2: SOUTH AFRICAN INBOUND TOURISM PERFORMANCE: JULY-SEPTEMBER 2019 COMPARED TO JULY-SEPTEMBER 2018

Arrivals for the period Jul-Sept 2019 compared to the same period in 2018 are indicated in Table 1. Total tourist arrivals (2 467 546) went down by -4.2% for the period Jul-Sept 2019 compared to arrivals recorded during the same period in 2018 (2 575 193). Total tourist arrivals from the overseas market decreased by -3.7% (-23 100), which was influenced by a decrease recorded in Australasia (-9.8%), Europe (-5.0%), Asia (-3.8%) and North America (-1.9%). Middle East recorded the highest increase (16.1%) from overseas markets followed by Central and South America (2.3%). Most Middle East countries showed an increase in tourist arrivals and Saudi Arabia recorded the highest increase in volume of 48.2% (1 539). The increase in Central and South America was driven by an increase in tourist arrivals from most countries from this region, with Brazil recording the highest volume growth of 1 356 (7.3%). The negative growth recorded in Europe was influenced by most of the countries, which had shown decrease in tourist arrivals from the region. Germany experienced the highest volume decline of -5 300 (-8.4%). The decrease from Asia was driven by a decline of -10.4% (-2 851) in tourist arrivals from China. Tourist arrivals from Africa declined by -4.4% (-85 090) during the same period under review.

Table 1: Total Tourist Arrivals by Region Jul-Sept 2019 vs. Jul-Sept 2018

REGION	Jul-Sept 2019	Jul-Sept 2018	Diff	% Diff
EUROPE	329 120	346 323	-17 203	-5,0%
NORTH AMERICA	116 990	119 273	-2 283	-1,9%
CENTRAL & SOUTH AMERICA	30 652	29 973	679	2,3%
AUSTRALASIA	34 409	38 131	-3 722	-9,8%
MIDDLE EAST	17 915	15 431	2 484	16,1%
ASIA	76 836	79 891	-3 055	-3,8%
TOTAL OVERSEAS	605 922	629 022	-23 100	-3,7%
TOTAL AFRICA	1 857 764	1 942 854	-85 090	-4,4%
Unspecified	3 860	3 317	543	16,4%
GRAND TOTAL	2 467 546	2 575 193	-107 647	-4,2%

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

Table 2 gives the rankings of the top ten African source markets for the period Jul-Sept 2019 compared to Jul-Sept 2018. All of the top ten African markets remained at the same position for the period under review except for Tanzania, which moved up from 12th position in 2018 to 10th position in 2019, replacing Nigeria. Most countries from the top ten African source markets recorded a decrease in tourist arrivals during this period except for Tanzania (8.0%),

Swaziland (6.5%) and Zimbabwe (0.8%). Tanzania experienced the highest growth of 8.0%, which translated to additional 716 tourist arrivals from this country.

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

COUNTRY	RANK: Jul-Sept 2019	Tourist Arrivals Jul-Sept 2019	RANK: Jul-Sept 2018	Tourist Arrivals Jul-Sept 2018	% Change from Jul-Sept 2018 to Jul-Sept 2019
Zimbabwe	1	542 700	1	538 236	0,8%
Lesotho	2	373 317	2	426 904	-12,6%
Mozambique	3	323 374	3	341 764	-5,4%
Swaziland	4	239 322	4	224 652	6,5%
Botswana	5	163 842	5	176 871	-7,4%
Malawi	6	54 977	6	55 437	-0,8%
Namibia	7	42 479	7	47 531	-10,6%
Zambia	8	37 894	8	43 015	-11,9%
Angola	9	14 181	9	14 895	-4,8%
Tanzania	10	9 680	12	8 964	8,0%

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

Table 3 shows the rankings of the top ten overseas source markets. Comparing Jul-Sept 2019 with Jul-Sept 2018, most top 10 overseas markets recorded a decrease in tourist arrivals except for Brazil (7.3%), Italy (4.6%), India (3.0%) and the Netherlands (0.8%). Despite this decline, all of the top ten overseas markets remained in the same position for the period under review. USA was the main source market from overseas during the period under review. Brazil however experienced the highest growth of 7.3%, which meant an additional 1 356 tourist arrivals from this country.

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

COUNTRY	RANK: Jul-Sept 2019	Tourist Arrivals Jul-Sept 2019	RANK: Jul-Sept 2018	Tourist Arrivals Jul-Sept 2018	% Change from Jul-Sept 2018 to Jul-Sept 2019
USA	1	103 023	1	104 590	-1,5%
UK	2	84 870	2	86 646	-2,0%
Germany	3	57 435	3	62 735	-8,4%
The Netherlands	4	42 364	4	42 025	0,8%
France	5	36 507	5	40 180	-9,1%
Australia	6	30 010	6	33 917	-11,5%
China	7	24 540	7	27 391	-10,4%
Italy	8	23 352	8	22 324	4,6%
India	9	21 158	9	20 543	3,0%
Brazil	10	19 845	10	18 489	7,3%

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

SECTION 3: PERFORMANCE OF OTHER SOUTH AFRICAN TOURISM RELATED INDUSTRIES (JUL-SEPT 2019)

1. ACCOMMODATION:

ACCOMMODATION INDUSTRY INCOME: JUL-SEPT 2019 COMPARED TO JUL-SEPT 2018

The total income from accommodation went up from R5 938.3 million in Jul-Sept 2018 to R6 236.1 million in Jul-Sept 2019 which was a fair increase of about 5.0% as indicated in Table 4 below. Compared to the previous quarter, Caravan parks and camping sites had the highest increase of about 9.7% in income followed by Hotels (3.4%). The other accommodation establishments also had a significant increase of 9.9%. Other accommodation includes lodges, bed-and-breakfast establishments, self-catering establishments and 'other' establishments not classified. Hotel establishments received the highest share (64.0%) of income received during Jul-Sept 2019 period.

Table 4: Income from accommodation: Jul-Sept 2019 compared to Jul-Sept 2018

Type of Accommodation	Jul-Sept 2018	Jul-Sept 2019	% Change	% share
Hotels (R million)	R3 860,1	R3 990,0	3,4%	64,0%
Caravan parks and camping sites (R million)	R60,0	R65,8	9,7%	1,1%
Guest houses and guest farms (R million)	R230,1	R215,4	-6,4%	3,5%
Other accommodation (R million)	R1 788,1	R1 964,9	9,9%	31,5%
Total Industry	R5 938,3	R6 236,1	5,0%	100%

Source: Stats SA: Accommodation data cuts, November 2019

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JUL-SEPT 2019 COMPARED TO JUL-SEPT 2018

The average occupancy rates for Jul-Sept 2019 compared to Jul-Sept 2018 is provided in the Table 5 below. Using seasonally adjusted figures, total industry average occupancy rate for the period Jul-Sept 2019 was 49,5% which was an increase compared to the same period in 2018 (48.7%). Hotels were the only accommodation category that experienced a slight decline in average occupancy rates for the period under review.

Table 5: Occupancy rate accommodation industry: Jul-Sept 2019 compared to Jul-Sept 2018 (Seasonally adjusted figures)

Seasonally Adjusted			
Occupancy Rate:	Jul-Sept 2018	Jul-Sept 2019	Change
Hotels	51,1	51,0	↓
Caravan parks and camping sites	27,6	30,6	↑
Guest houses and guest farms	35,1	35,2	↑
Other accommodation	50,6	53,0	↑
Total Industry	48,7	49,5	↑

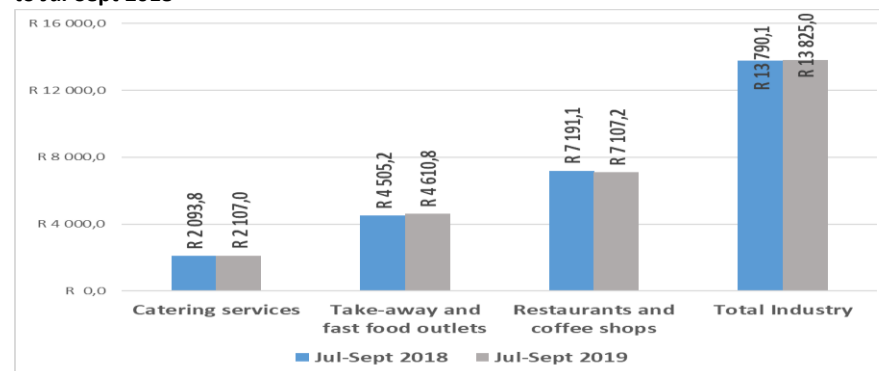
Source: Stats SA: Accommodation data cuts, November 2019

2. FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JUL-SEPT 2019 COMPARED TO JUL-SEPT 2018

The results in Figure 2 below indicate that the total income of the food and beverages industry was about R 13 825.0 million in Jul-Sept 2019 which was an increase of 0.3% when compared to income of about R 13 790.1 million for Jul-Sept 2018. Restaurant's and coffee shops contributed about 52.1% to total income during Jul-Sept 2018 and 51.4% during Jul-Sept 2019. Take-away and fast food outlets contribution was about 32.7% in Jul-Sept 2018 and 33.4% during Jul-Sept 2019. Catering services remained flat in Jul-Sept 2019 (15.2%).

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



Type of food and beverage industry	% Change	Jul-Sept 2018 % Share	Jul-Sept 2019 % Share
Restaurants and coffee shops	0.6%	52,1%	51,4%
Take-away and fast food outlets	2.3%	32,7%	33,4%
Catering services	-1.2%	15,2%	15,2%
Total industry	0.3%	52,1%	51,4%

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

3. AVIATION

AIR PASSENGER ARRIVALS: JUL-SEPT 2019 COMPARED TO JUL-SEPT 2018

Table 6 below indicates the total passenger arrivals in Airports Company South Africa (ACSA) airports during Jul-Sept 2019 compared to Jul-Sept 2018. Total passenger arrivals increased by 3.2% moving from 5 292 573 in Jul-Sept 2018 to 5 464 134 in Jul-Sept 2019. Passengers arriving on regional, domestic and unscheduled flights had an increase of about 3, 9%, 4, 6% and 1, 0% respectively. And, international passenger arrivals decreased by -0.1% during the same period under review.

Table 6: Arriving passengers to South Africa by region Jul-Sept 2019 compared to Jul-Sept 18

Arriving Passengers	Jul-Sept 2018	Jul-Sept 2019	Difference	% Change
International	1 537 700	1 536 419	-1 281	-0,1%
Regional	151 283	157 197	5 914	3,9%
Domestic	3 587 821	3 754 591	166 770	4,6%
Unscheduled	15 769	15 927	158	1,0%
Total	5 292 573	5 464 134	171 561	3,2%

Source: ACSA data, September 2019

PASSENGER DEPARTURE MOVEMENTS: JUL-SEPT 2019 COMPARED TO JUL-SEPT 2018

Table 7 below shows the total passengers departing from ACSA airports during the period Jul-Sept 2019 compared to Jul-Sept 2018. Total passengers departing increased by 3.3% in Jul-Sept 2019 compared to Jul-Sept 2018. Passengers departing on unscheduled flights also had the highest increase of about 8, 1% (1 281), followed by regional (5, 4%) and domestic (4, 6%) during the period under review.

Table 7: Departing passengers from South Africa by region: Jul-Sept 2019 compared to Jul-Sept 18

Departing Passengers	Jul-Sept 2018	Jul-Sept 2019	Difference	% Change
International	1 504 396	1 505 463	1 067	0,1%
Regional	146 393	154 260	7 867	5,4%
Domestic	3 595 084	3 759 172	164 088	4,6%
Unscheduled	15 849	17 130	1 281	8,1%
Total	5 261 722	5 436 025	174 303	3,3%

Source: ACSA data, September 2019

SECTION 4: DIRECT TOURISM EMPLOYMENT ESTIMATES

Direct Contribution of Tourism to South Africa's employment

The data presented in this section uses Stats SA's Tourism Satellite Account 2018 preliminary tourism employment ratios to estimate direct contribution of tourism to employment for the period July to September 2019. For Jul-Sept 2019, an estimated 4.5% of South African jobs were directly created through tourism activities. Table 8 below gives data comparison between two periods: Jul-Sept 2019 and Jul-Sept 2018. The table indicates an estimated increase of 0.9% in total direct jobs created by the tourism sector, which resulted in more jobs (6 646) created between the period Jul-Sept 2019 compared to Jul-Sept 2018.

Table 8: Direct Tourism employment: Jul-Sept 2019 compared to Jul-Sept 2018

	2018 Q3	2019 Q3	Difference	% Growth
Tourism Employment	734 181	740 827	6 646	0,9%

Source: Calculated from the Q3 2019 Labour Force Survey data and 2018 TSA Ratios.

Share of Tourism employment by gender

Estimates of tourism employment by gender for the period Jul-Sept 2019 compared to Jul-Sept 2018 is indicated in Table 9 below. For the previous quarter, there were more females directly employed in the tourism sector than males. The share of women directly employed in the tourism sector for the period Jul-Sept 2019 declined from 51.5% to 40.4%, while the share of males increased from 48.5% to 59.6%.

Table 9: Direct Tourism employment by Gender: Jul-Sept 2019 compared to Jul-Sept 2018

Period	Male (% Share)	Female (% Share)
Jul-Sept 2018	48,5%	51,5%
Jul-Sept 2019	59,6%	40,4%

Source: Calculated from the Q3 2019 Labour Force Survey data and 2018 TSA Ratios

Table 10: Share of tourism employment by type of industry: Jul-Sept 2019

Tourism Industry	% Share
Road Passenger transport	30,6%
Food and Beverage	19,0%
Accommodation	17,4%
Retail trade	15,4%
Other industries (railway passenger transport, water passenger transport, air passenger transport, transport equipment rental, travel agencies, cultural services, sporting and other recreation services)	17,4%

The figures in Table 10 indicate that almost a third of tourism jobs for the period Jul-Sept 2019 were in the road passenger transport industry (30,6%), followed by the food and beverage industry (19,0%).






Source: Calculated from the Q3 2019 Labour Force Survey data and 2018 TSA Ratios

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1. Statistics South Africa. September 2019. Monthly Tourism and Migration report.
2. Statistics South Africa. July-September 2019. Food and Beverages data cuts.
3. Statistics South Africa. July-September 2019. Accommodation data cuts
4. Statistics South Africa. Quarterly Labour Force Survey, September 2019.
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ANNEXURE 1: TOTAL TOURIST ARRIVALS TOP TEN OVERSEAS AND AFRICA MARKETS: JULY-SEPTEMBER 2019 COMPARED TO JULY-SEPTEMBER 2018

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country		Arrivals	
USA		103023 -1.5% down from 2018	↓
UK		84870 -2.0% down from 2018	↓
Germany		57 435 -8,4% down from 2018	↓
Netherlands		42 365 0,8% up from 2018	↑
France		36 507 -9,1% down from 2018	↓

**TOP FIVE AFRICA
SOURCE MARKETS**

Country		Arrivals	
Zimbabwe		542 700 0.8% up from 2018	↑
Lesotho		373 317 -12.6% down from 2018	↓
Mozambique		323 374 -5.4% down from 2018	↓
Swaziland		239 322 6.5% up from 2018	↑
Botswana		163 842 -7.4% down from 2018	↓