tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

STATE OF TOURISM REPORT 2017/18

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LIST OF ABBREVIATIONS

ACSA	Airports Company South Africa
ADR	Average Daily Rate
ARR	Average Room Rate
ASK	Available Seat Kilometre
CPI	Consumer Price Inflation
EC	Eastern Cape
FS	Free State
DHA	Department of Home Affairs
EPWP	Expanded Public Works Programme
EUR	EURO
GDP	Gross Domestic Product
GP	Gauteng
GBP	Great British Pound
IATA	International Air Transport Association
ICCA	International Congress and Convention Association
KZN	KwaZulu-Natal
LP	Limpopo
MICE	Meetings, Incentives, Conferences and Exhibitions
MP	Mpumalanga
MCS	Movement Control System
NC	Northern Cape
NDP	National Development Plan
NW	North West
PLF	Passenger Load Factor
RPK	Revenue Passenger Kilometres
RevPAR	Revenue Per Available Room
SA	South Africa
SADC	Southern African Development Community
SA Tourism	South African Tourism
Stats SA	Statistics South Africa
TSA: RMF	Tourism Satellite Account: Recommended Methodological Framework
TSA	Tourism Satellite Account

VFR	Visiting friends and relatives
UAE	United Arab Emirates
UNWTO	World Tourism Organisation
WTTC	World Travel and Tourism Council

LIST OF DEFINITIONS

ADR (Average Daily Rate)	Room revenue/rooms sold: i.e., a measure of the average rate paid for rooms sold is calculated by dividing room revenue by rooms sold.
Available Seat-Kilometres (ASK)	The number of seats carriers have available multiplied by the number of kilometres flown. The ratio of revenue passenger kilometres.
Country of Residence	The country of residence of a household is determined according to the centre of predominant economic interest of its members. If a person resides (or intends to reside) for more than one year in a given country and has there his/her centre of economic interest (for example, where the predominant amount of time is spent), he/she is considered as a resident of this country.
Destination (main destination of a trip)	The main destination of a tourism trip is defined as the place visited that is central to the decision to take the trip.
Domestic Day Trips	A trip outside of the respondent's usual environment, where they leave and return within the same day (i.e., do not stay overnight).
Domestic Overnights	A visitor/tourist who stays at least one night in collective or private accommodation in the place visited.
Domestic Tourism	The tourism of resident visitors within the economic territory of the country of reference.
Inbound Tourism	Which comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.
Industry	Group of establishments engaged in the same or similar kinds of activity.
International Tourism	The combination of inbound tourism and outbound tourism.
Occupancy	Rooms sold/rooms available: the percentage of available rooms that were sold during a specified period of time. Occupancy is calculated by dividing the number of rooms sold by the number of rooms available.
Outbound Tourism	Comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip.
Passenger Load Factor	The ratio of revenue passenger kilometres (RPK) to available seat-kilometres (ASK) is called passenger load factor: i.e., the percentage of capacity used.
Purpose of Visit	The major groups that are recommended for classifying the main purpose of visit (or trip) are: leisure, recreation and holidays; visiting friends and relatives; business and professional reasons; health treatment; religion/pilgrimages and other.
Region	An area, especially part of a country or the world, having definable characteristics but not always fixed boundaries.
Revenue Passenger-Kilometres (RPK)	RPK represents one paying passenger transported over one kilometre, so the number of passengers is multiplied by the distance flown. This means that each long-haul passenger contributes more to total traffic measured in RPKs than each short-haul passenger does.
RevPAR (Revenue per available room)	Room revenue/rooms available (or = occupancy x ADR): the total guest room revenue divided by the total number of available rooms.
Total foreign direct spend in South Africa (TFDS)	The total amount spent directly in South Africa by all foreign tourists including amounts spent on goods for resale and capital investments.

Tourism Demand	Is the sum of tourism consumption, tourism collective consumption and tourism gross fixed capital formation.
Tourism Employment	An activity in which a person performs work for pay, profit or family gain. Such a person can be self-employed, an employer, an employee or a working family member.
Tourism Gross Domestic Product	Tourism GDP is the GDP generated in the economy by the tourism industries and other industries in response to tourism internal consumption.
Tourism Sector	The tourism sector consists of the set of institutional units whose principal economic activity is a tourism-characteristic activity. These units might belong to the following institutional sectors: households; non-financial corporations (private, foreign owned, publicly owned); financial corporations; general government or non-profit institutions serving households.
Tourist	A visitor who stays at least one night in the place visited.
Traveller	A traveller is any person on a trip between two or more countries, or between two or more localities within his/her country of usual residence.
Usual Environment	To be outside the 'usual environment' the person should travel more than 40 kilometres from his/her place of residence (one way) AND the place should NOT be visited more than once a week. This includes place of work and place of study. Leisure and recreational trips are included irrespective of frequency.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months, and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited.

Note: The definitions were sourced from UNWTO and Statistics South Africa

INTRODUCTION AND BACKGROUND

Tourism is an important driver for economic growth and development in South Africa. During the President's 2019 state of the State of the Nation Address in June 2019, tourism was identified as one of the key areas that contributes towards South Africa's economy and has the potential to have a more significant impact in the coming years for job creation (State of the Nation Address, June 2019). Preliminary data for 2017 from the Tourism Satellite Account (TSA) indicated that the tourism sector in South Africa directly employed 722 013 persons in 2017, an increase of 4,6% (31 752) employees compared to 690 261 in 2016. South Africa's tourist arrivals also continued to increase since 2016. Most recent statistics from Stats SA indicated that South Africa's tourist arrivals increased from 10.2 million in 2017 to 10.5 million in 2018 which was a growth of 1.8%. This growth however was lower than the global growth rate which was reported at about 6% by World Tourism Organisation (UNWTO) (UNWTO Barometer, May 2019). To access the growing pool of tourists travelling globally and increase tourist arrivals to the country, South Africa's strategies in growing tourism needs to be innovative and focused to target potential tourists from the growing markets for example India and Chinese.

In 2011, the Department of Tourism together with key tourism stakeholders developed the National Tourism Sector Strategy (NTSS). The NTSS is a detailed plan that is meant to assist in accelerating the contribution of the tourism sector to the economic development of the country (NTSS, 2011). The NTSS further identifies priority actions for implementation in the short, medium and long term. The strategy has been reviewed with targets covering the period 2015 to 2026.

To monitor the performance of the sector, the Department of Tourism produces an Annual State of Tourism Report which serves as a strategic tool to inform decision-makers and businesses on the sector's performance and developmental aspects.

STATE OF TOURISM 2017/18 REPORT STRUCTURE AND THEMES

The 2017/18 STR used secondary data to report on the performance of the tourism sector. This secondary data was sourced from different institutions such as the UNWTO, the World Travel and Tourism Council (WTTC), the International Air Transport Association (IATA) and Euromonitor. These data sources were used to report on the performance of the industry globally. In addition, and specifically for the analysis of the South Africa tourism sector performance, secondary data was sourced from organisations such as SA Tourism, Statistics South Africa (Stats SA), the Airports Company of South Africa (ACSA). In addition, the 2017/18 STR provides a detailed description of a government owned related tourism establishments namely; SanParks.

As outlined above, reporting follows the STR 2017/18 Framework and this includes the analysis of key tourism indicators similar to those used in the previous 2016/17 STR, to ensure consistency and continuity. This report includes the analysis of key indicators such as, but not limited to:

- Chapter One: South Africa's Tourism Economic Value
- Chapter Two: Performance of South Africa's Tourism Related Industries
- Chapter Three: South Africa's Inbound Tourism Performance
- Chapter Four: South Africa's Domestic Tourism Performance
- Chapter Five: Government owned tourism related establishments: Case Study: SanParks
- Chapter Six: Global Tourism Economic Impact
- Chapter Seven: Global Tourism Performance
- Chapter Eight: Global Tourism Related Industries Performance

CHAPTER ONE: THE ECONOMIC VALUE OF TOURISM IN SOUTH AFRICA

The tourism sector has made a significant impact on the country's economic and job creation over the years. Usually industries are classified according to their production, however the tourism sector output is determined by consumption spending of tourists and other visitors within the country. Measuring tourism spending therefore requires identifying visitors and their related expenditure patterns. In order to measure the economic impact of the tourism sector, the UNWTO has developed the Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF) which is used as a guide to measure the direct contribution of tourism to the economy. The Tourism Satellite Account (TSA) for South Africa is compiled by Statistics South Africa (Stats SA) and it measures the direct contribution of tourism to the economy by calculating the output of each industry that is consumed by visitors (Hooper and van Zyl, 2011).

This section of the report analyses key indicators which include tourism's contribution to South Africa's Gross Domestic Product (GDP) and employment.

1.1 Contribution of Tourism to GDP in South Africa

1.1.1 Total contribution of tourism to GDP in South Africa: 2013-2019 and forecasts for 2029

Stats SA's TSA does not produce results for the tourism sector's total contribution (direct and indirect) to GDP and employment as there is no framework or methodology to guide this measure. This data was therefore sourced from the WTTC country report for South Africa: 2019.Figure 1 below shows that for the period 2017-2018, it was estimated that the total (direct and indirect) contribution of tourism to GDP went down from R432,9 billion in 2017 (8.8% of GDP) to R425.5 billion in 2018 (8.6% of GDP) which was a decline of -1.7%. WTTC estimated that the sector's total contribution in 2019 will increase by about 3.7% compare to 2018 which will go up to R441,1 billion (8.7% of GDP). Forecasted data for 2029 indicates that South Africa's travel and tourism industry will be about R612,2 billion resulting in a 9.6% share of total GDP.

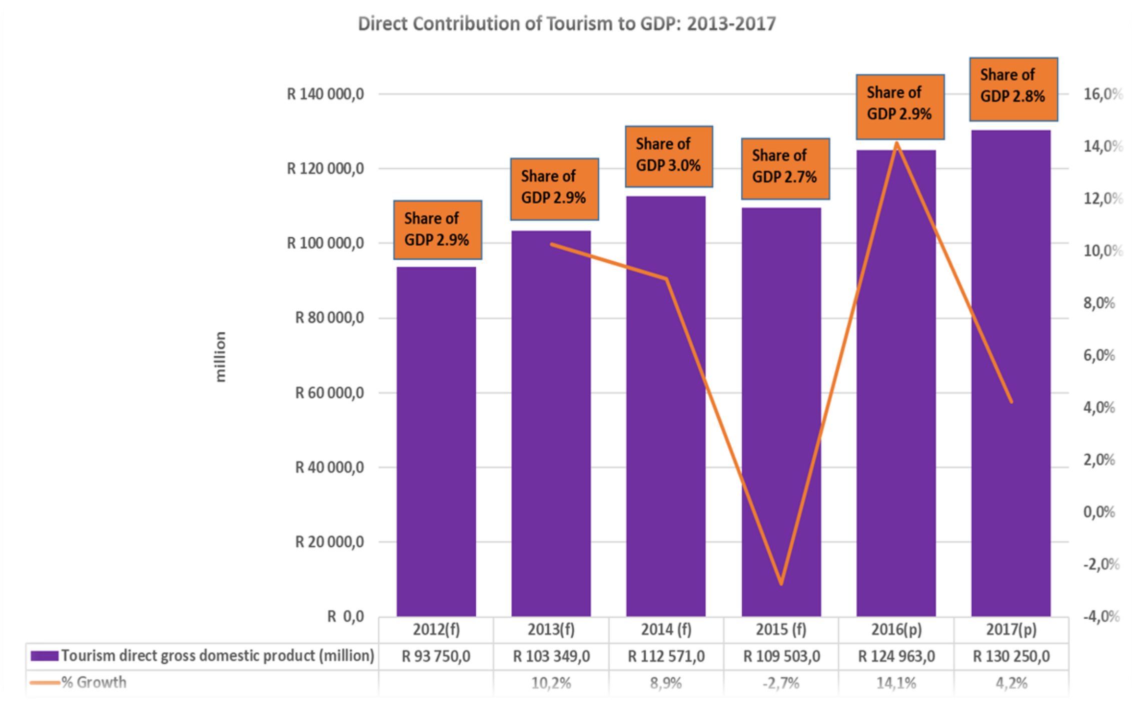
Figure 1: Total contribution of Travel and Tourism to GDP in South Africa: 2013-2019 and forecast for 2029

Note: Real 2018 prices *Source: WTTC, South Africa Report, 2019*

1.1.2 Direct contribution of tourism to GDP in South Africa: 2013-2017

Figure below indicates the provisional results for 2016 and 2017 as per the TSA. The direct contribution of tourism towards the country's GDP increased from R124,963 million in 2016 (2.9% of GDP) to R130, 250 million in 2017 (2.8% of GDP) which was a growth of 4.2% compared to 2016.

Figure 2: Direct contribution of tourism to GDP: 2013-2017



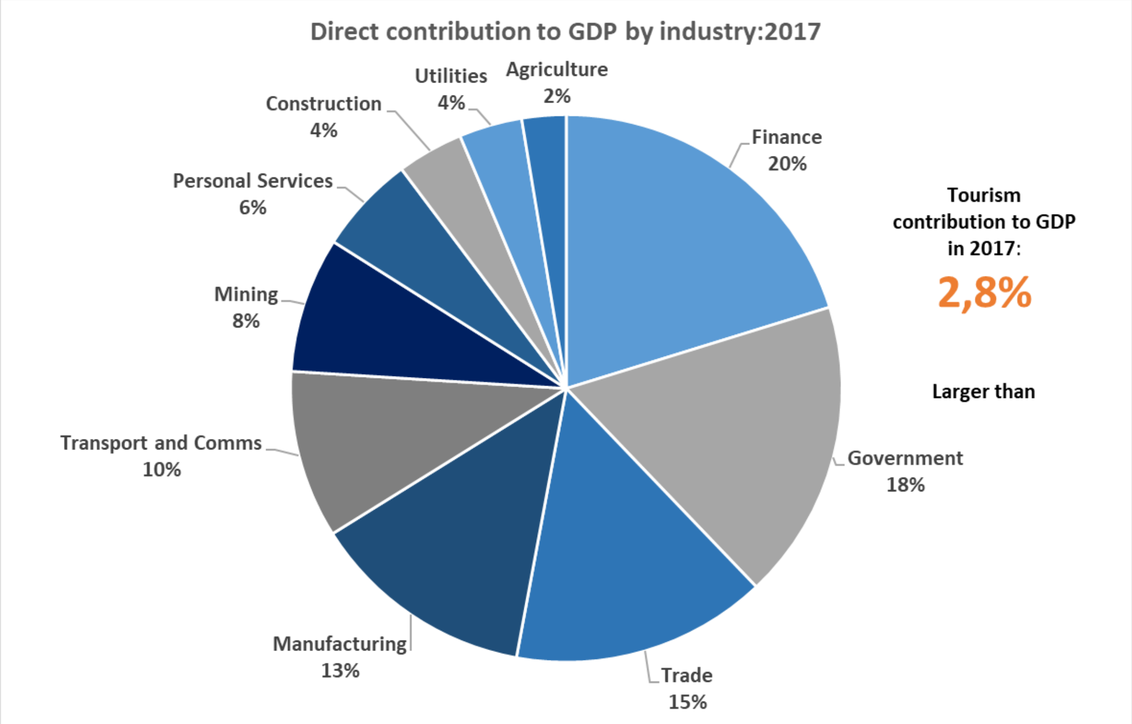
**Note: (f)=Final and (p)=preliminary*

Source: Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

1.1.3 Direct contribution of tourism to GDP compared to other industries in South Africa: 2017

Figure below indicates the direct percentage contribution of industries towards South Africa's total GDP in 2017 as reported by Stats SA. As mentioned in the TSA, "the tourism sector is not measured as a sector in its own right in the national accounts, because tourism is not a clearly defined industry in the International Standard Industrial Classification of all Economic Activities (ISIC), but rather an amalgamation of industries such as transportation, accommodation, food and beverage services, recreation and entertainment, travel 35 agencies, etc.'' (Stats SA, 2017). It is for this reason that the tourism sector does not feature as a separate industry in the graph below. The results show that the finance sector (20.2%), the government sector (17.7%), Trade sector (15.0%) and the manufacturing sector (13.2%) are the leading contributors towards the country's GDP. The tourism sector's direct percentage contribution to GDP in 2017 was 2.8% which is larger than the agriculture sector (2.6%) but smaller than mining (8.0%).

Figure 3: Direct contribution to GDP by industry: 2017

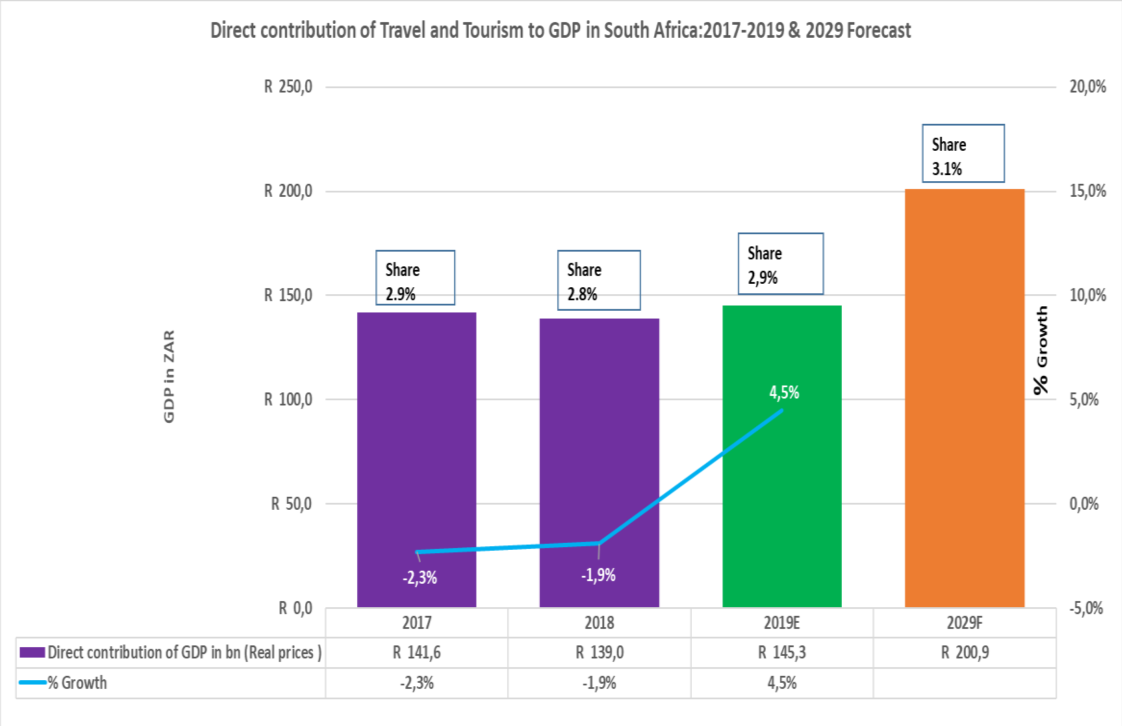


Source: Media Presentation for the Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

1.1.4 Estimates of direct contribution of tourism to GDP in South Africa: 2013-2019 and forecasts for 2029

The figure below provides estimates from WTTC on the direct contribution of travel and tourism for the period 2017 and forecasts for 2029. The estimates are different from the figures provided in the TSA however the trend is the same. According to WTTC, it was estimated that the direct contribution of tourism to GDP went down from R141,6 billion in 2017 (2.9% of GDP) to R139,0 billion in 2018 (2.8% of GDP) which was a decline of -1.9%. WTTC estimated that the sector's total contribution in 2019 will increase by about 4.5% compare to 2018 which will go up to R145,3 billion (2.9% of GDP). Forecasted data for 2029 indicates that South Africa's travel and tourism industry will be about R200,9 billion resulting in a 3.1% share of GDP in South Africa.

Figure 4: Direct contribution of Travel and Tourism to GDP in South Africa: 2017-2019 and forecasts for 2029



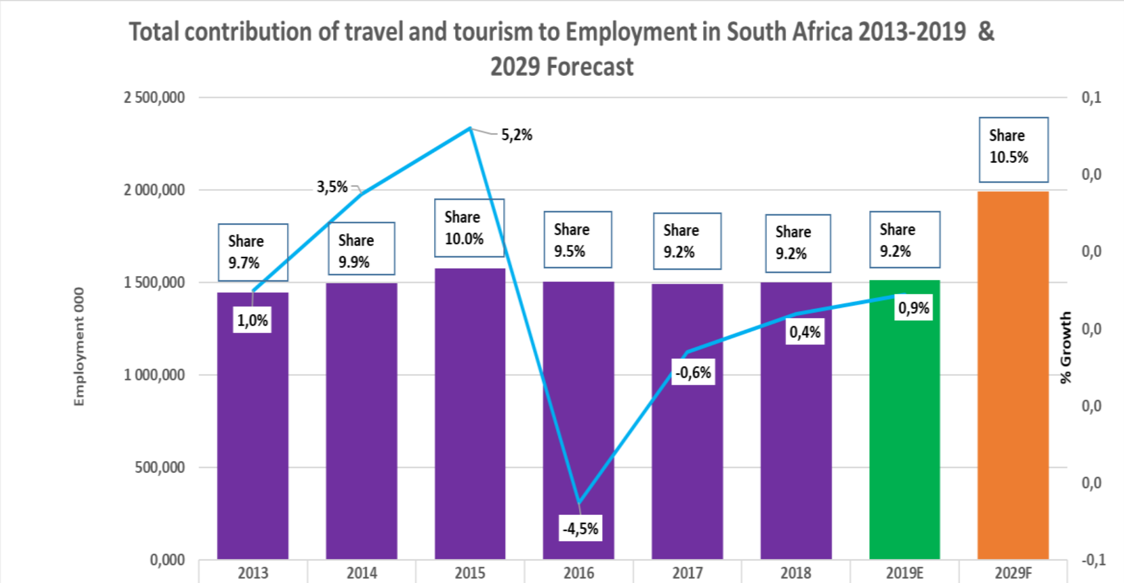
Note: Real 2018 prices *Source: WTTC, South Africa report, 2019*

1.2 Contribution of tourism to employment in South Africa

1.2.1 Total contribution of tourism to employment in South Africa: 2013-2019 and forecasts for 2029

Data on the total contribution of the travel and tourism sector to employment for South Africa was sourced from WTTC and is provided in the figure below.

Figure 5: Total contribution of travel and tourism to Employment in South Africa 2013-2019 and forecasts for 2029



	2013	2014	2015	2016	2017	2018	2019E	2029F
Thousands of jobs	1446,36	1497,15	1575,28	1503,72	1494,23	1499,67	1513,62	1991,32
Year on year growth	1,0%	3,5%	5,2%	-4,5%	-0,6%	0,4%	0,9%	

Source: WTTC South Africa report, 2019.

According to WTTC estimates, in 2018 the travel and tourism sector contributed about 1 499 670 jobs (contributing 9.2% to total employment) which was an increase of 0.4% compared to 1 494 230 workers (9.2 share % to the country's total employment) in 2017. In 2019, WTTC further estimated that the travel and tourism sector will contribute about 1 513 620 jobs (9.2% to the country's total employment) and this was a growth of 0.9% compared to 2018. Forecasts data for 2029 indicated that South Africa's travel and tourism sector will contribute total of 1 991 320 jobs with a 10.2% share of total employment.

1.2.2 Direct Contribution of tourism to employment: 2012-2017

Direct tourism employment figures were sourced from the TSA which provides final figures for the period 2012-2015 and preliminary figures for 2016 and 2017. In 2012, there was a total of 646 390 direct jobs which increased to 722 013 direct jobs in 2017 that was created by the tourism sector which resulted in an addition 75 623 jobs created between the period 2012-2017. Preliminary results for 2016 and 2017 indicate that there were 722 013 workers directly employed within the sector in 2017, contributing about 4.5% to the country's total employment. This was an increase of 4.6% in the number of jobs created by the tourism sector in 2017 compared to 2016.

Figure 6: Direct Tourism Employment: 2013-2017

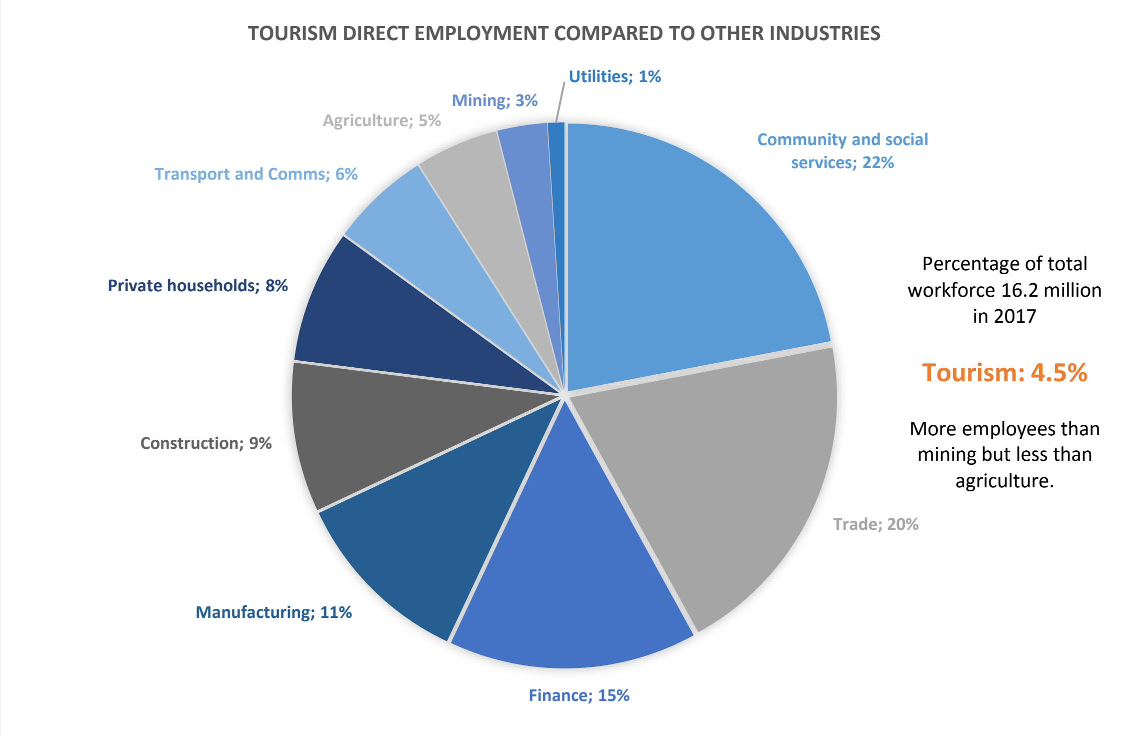
Indicator	2013(f)	2014 (f)	2015 (f)	2016(p)	2017(p)
% of total employment in South Africa	4,4	4,5	4,3	4,4	4,5
% Growth	1,8%	3,7%	-1,8%	3,1%	4,6%

Source: Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

1.2.3 Direct contribution of tourism to employment compared to other industries in South Africa: 2017

Figure below indicates the direct contribution of South African industries towards the country's total employment in 2017. The results provided indicate that the community and social services industry (22%), the trade industry (20%) and the finance industry (15%) are the leading industries contributing more towards the country's total employment. The tourism sector's direct e contribution to total employment in 2017 was 4.5% which was larger than the mining sector (3%) but smaller than the agriculture sector (5%). The trade industry and finance industry also featured as the two industries that contributed the most towards the country's GDP in 2017.

Figure 7: Tourism Direct Employment compared to other industries: 2017

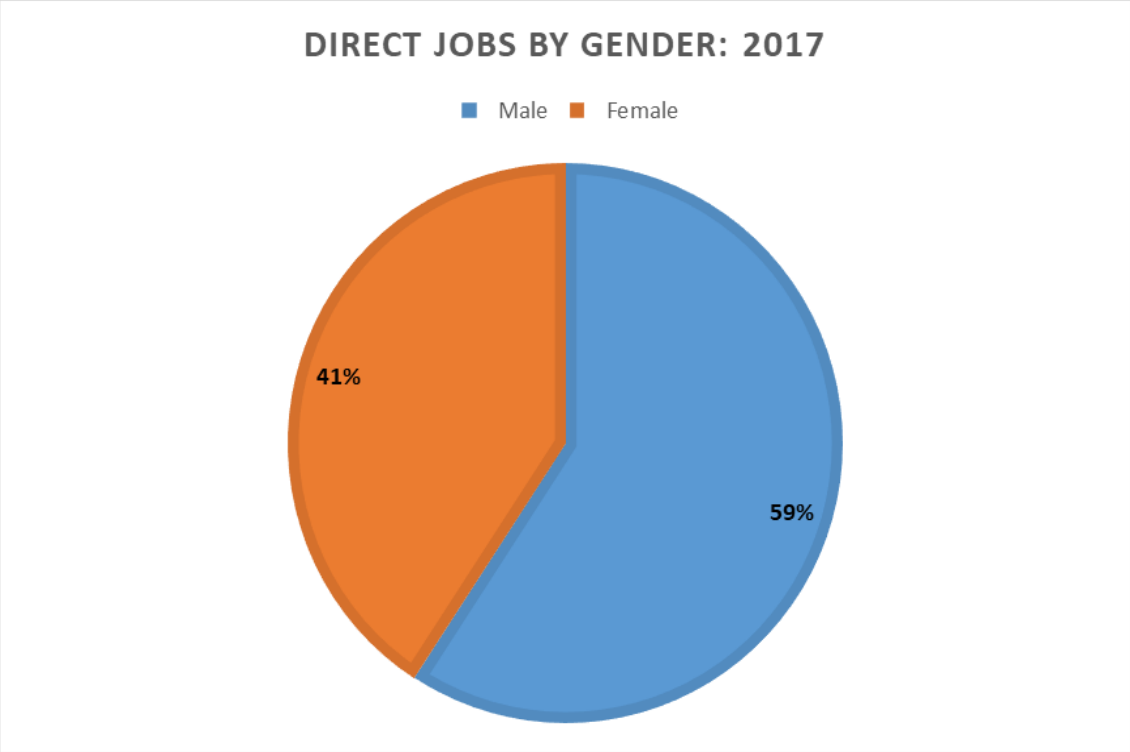


Source: Media Presentation for the Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

1.2.4 Demographic characteristics of people directly employed in the tourism sector: 2017 (Preliminary)

Tourism has become one of the major employers for South Africa. The figure below indicates the gender and race of persons directly employed in the tourism sector during 2017. More than half of the people directly employed in the tourism sector were male (59%) while there was 41% of women employed in the sector.

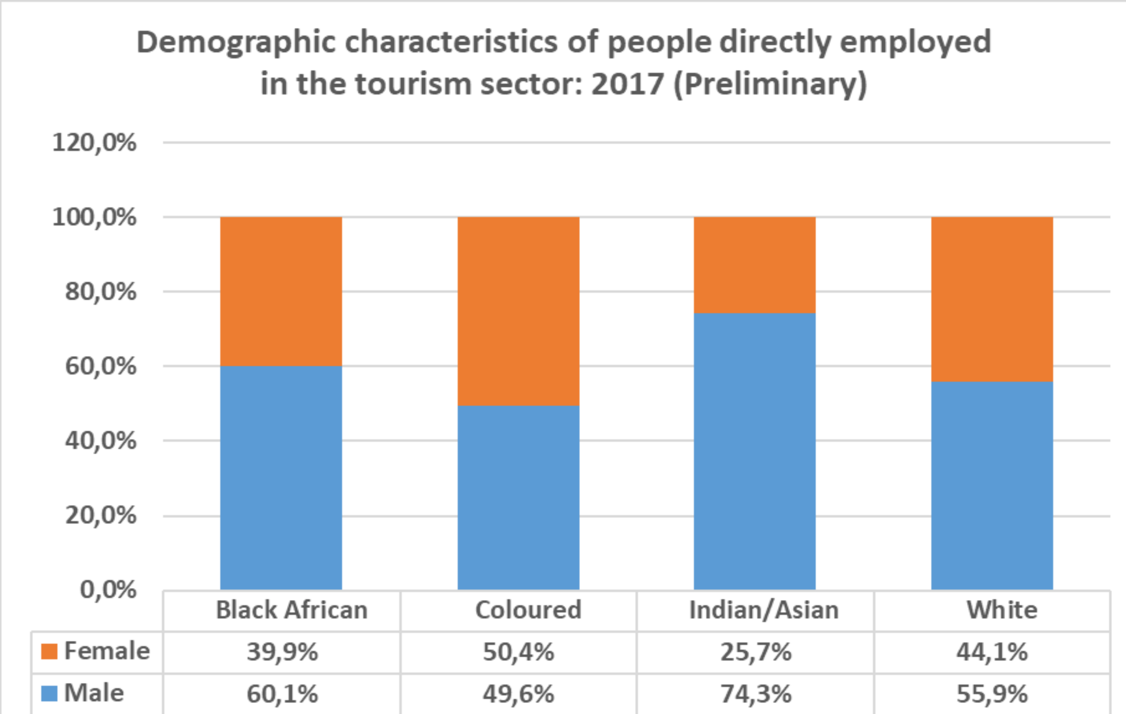
Figure 8: Direct tourism jobs by gender: 2017



Source: Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

Figure below also indicates that in 2017 there were more males working in the tourism sector for most race groups except for the Coloureds which had slight more females compared to males. In order to assess the progress that the sector has made in the area of transformation it is recommended that there should be further research conducted to investigate the skill levels and positions of the different gender and race groups employed in the tourism sector.

Figure 9: Demographic characteristics of people directly employed in the tourism sector: 2017 (Preliminary)



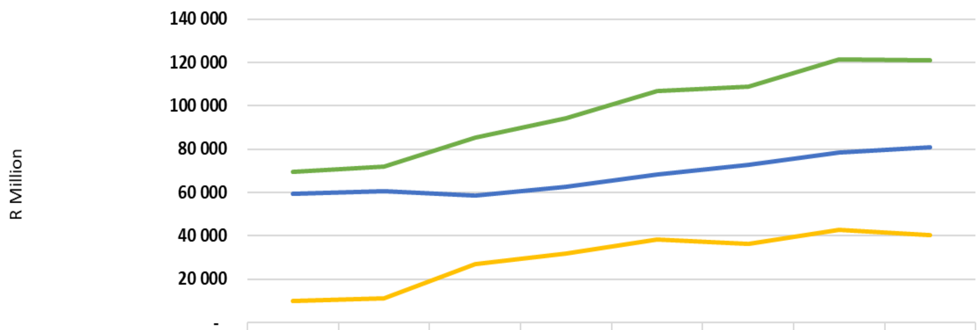
Source: Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

1.3 Tourism Balance of Payments for South Africa: 2010-2017

The TSA measure the total spend of international visitors which includes same-day and overnight visitors. The figure below indicates that total spend by international visitors contributes to South Africa's export earnings and the total spend of South Africans travelling overseas contributes towards total imports. Figure below shows that in 2017 the total international visitor spend was R120 979 million which was a decline of -0.3% compared to 2016 (R121 400 million). In 2017, the value of outbound tourism was R80 838 million which was a 3.0% growth compared to 2016 (R78 493 million). Therefore, the value of exports (inbound tourism expenditure) was higher than the value of imports (outbound tourism expenditure) which resulted in South Africa having a positive trade balance for 2017. The figures also indicate that the outbound tourism expenditure is growing at a faster rate than inbound tourism expenditure. These results indicate that there is a potential to grow domestic tourism expenditure if the outbound expenditure could be diverted towards domestic tourism.

Figure 10: Tourism exports, imports and net trade, 2010 to 2017

Figure 10: Tourism exports, imports and net trade, 2010 to 2017



	2010	2011	2012	2013	2014	2015	2016	2017
Inbound tourism expenditure	69 422	71 747	85 423	94 183	106 728	108 760	121 400	120 979
Outbound tourism expenditure	59 452	60 545	58 588	62 596	68 417	72 712	78 493	80 838
Tourism trade balance with the rest of the world	9 970	11 202	26 835	31 587	38 311	36 048	42 907	40 141

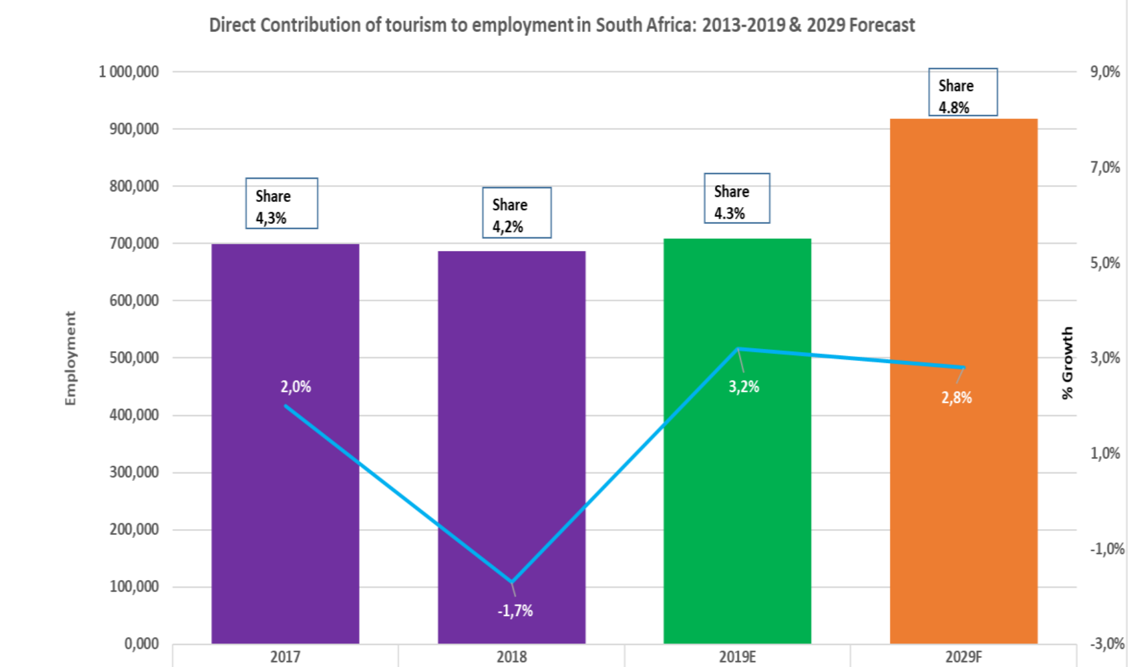
% Change	2011	2012	2013	2014	2015	2016	2017
Exports: Inbound expenditure	3,3%	19,1%	10,3%	13,3%	1,9%	11,6%	-0,3%
Imports: Outbound expenditure	1,8%	-3,2%	6,8%	9,3%	6,3%	8,0%	3,0%

Source: Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

1.4 Direct Contribution of tourism to employment in South Africa: 2013-2019 and forecasts for 2029

According to WTTC, it was estimated that the direct contribution of tourism to employment went down from 698,905 in 2017 (4.3% of GDP) to 687, 296 in 2018 (4.2% of GDP) which was a decline of -1.7%. In 2019, the sector's direct contribution to employment will increase by about 3.2% compare to 2018 which will go up to 709,211 (4.3% of GDP). Forecasted data for 2029 indicates that South Africa's travel and tourism will contribute 917,933 direct jobs (4.8% share of total employment).

Figure 11: Direct Contribution of tourism to employment in South Africa: 2013-2019 and forecasts for 2029



	2017	2018	2019E	2029F
Thousands of jobs	698,905	687,296	709,211	917,933
Percentage growth	2,0%	-1,7%	3,2%	2,8%

Source: WTTC South Africa report, 2019

CHAPTER TWO: PERFORMANCE OF TOURISM RELATED INDUSTRIES IN SOUTH AFRICA

There are many industries whom are economically dependent on the tourism sector. Industries that are directly affected by the tourism sector include amongst others; accommodation, restaurants, transportation, amusements, and retail trade. As previously indicated industry ratios are calculated for each of the different tourism industries based on the proportion that is consumed by visitors. These tourism industry ratios assist in developing the TSA.

The next section focuses on the performance of some of the tourism related industries in South Africa. The performance of these industries is key for the tourism sector's contribution to the country's Gross Domestic Product (GDP) and total employment. The data for this section is mainly sourced from Statistics South Africa (Stats SA) and Airports Company South Africa (ACSA). In addition, the 2019 travel and tourism competitiveness index for South Africa is also reported in this chapter.

2.1 Tourism industries ratios: 2017

The TSA defines tourism industry ratios as the proportion of an industry's output that is consumed by visitors (TSA, 2018). These ratios are used to calculate employment for the tourism sector. For the table below, travel agencies and other reservations services industry have the highest industry ratio of 98% since visitors are often the biggest consumers of their services. The table also indicates that 89% of expenditure from air passenger transport is from visitors unlike rail passenger transport which indicated that only 7% of the expenditure is from visitors. These rations show the importance of the different industries that are related to tourism.

Table 1: Tourism ratios by industry: 2017 (Preliminary)

Industry	Tourism Industry Ratios (%)
Accommodation	80
Food and Beverage	37
Railway passenger transport	7
Road passenger transport	36
Water passenger transport	47
Air passenger transport	89
Transport equipment rental	65
Travel agencies and other reservations services industry	98
Cultural industry	18

Industry	Tourism Industry Ratios (%)
Sports and recreation industry	26
Retail trade of tourism connected products	8

Source: Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017, 2018

2.2 Accommodation industry performance: 2017-2018

The following sub-section of the report focuses on the performance of the accommodation industry by analysing key indicators such as number of stay unit's available, total income from accommodation and occupancy rate. The data was sourced from Stats SA based on the finding from the accommodation survey.

2.2.1 Stay units available: 2017-2018

There was a total of approximately 1 516 200 stay units available in 2018 which showed a slight increase of 0.2% compared to 2017. Table below indicates that the increase in stay units in the industry during the period under review was mainly in the hotel industry (0.4%). According to the Hotel Outlook, a report done by Price Waterhouse and Cooper (PWC), there were eight additional hotels that opened in 2018, including a Sun International (Time Square Hotel and Conferencing opened in March 2018), and an Onomo hotel (Located in Masinga and opened in March, 2018). These additional hotels could be responsible for the increase in the hotel industry in 2018. The other accommodation types showed little or no increase in availability of stay units during the period under review.

Table 2: Number of stay units: 2017-2018

Stay units available (000)	2017	2018	% Change
Stay units available – Hotels	992,1	996,0	0,4%
Stay units available - Caravan parks and camping sites	93,6	93,1	-0,5%
Stay units available - Guest houses and guest farms	100,8	100,8	0,0%
Stay units available - Other accommodation *(Lodges, bed and breakfast establishments, self-catering establishments and 'other' establishments not classified elsewhere recorded)*	326,4	326,3	-0,03%
Stay units available - Total industry	1 512,9	1 516,2	0,2%

Source: Stats SA: Accommodation data cuts, May 2019

2.2.2 Income from accommodation: 2017- 2018

The total income from accommodation was almost flat in 2018 moving from R24 971.2 million in 2017 to R24 938.8 million in 2018. Other accommodation establishments had an increase of 5,8% in income during 2018 compare to 2017. This could be an indication that small establishments within the accommodation sector had a good year in 2018 compared to 2017 even though that the number of stay units for this category of accommodation declined in 2018.

Table 3: Accommodation Industry Total Income (million): 2017-2018

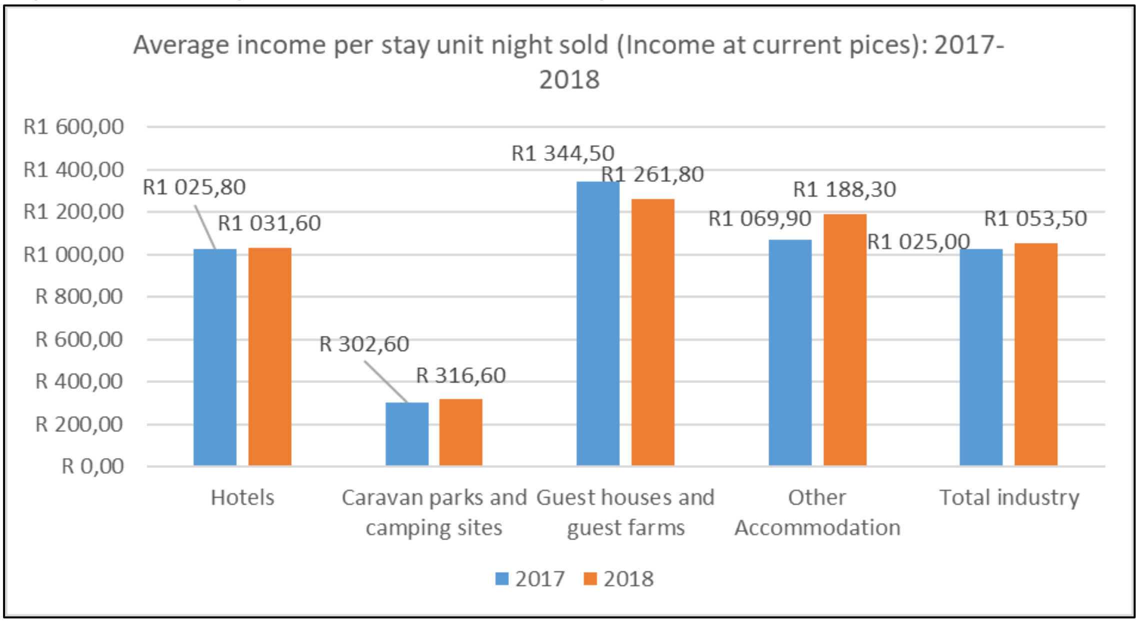
Accommodation categories	2017 (million)	2018 (million)	% Change
Hotels	R16 199,1	R16 095,2	-0,6%
Caravan parks and camping sites	R307,9	R307,3	-0,2%
Guest houses and guest farms	R1 778,6	R1 460,6	-17,9%
Other accommodation *(Lodges, bed and breakfast establishments, self-catering establishments and 'other' establishments not classified elsewhere recorded)*	R6 685,6	R7 075,7	5,8%
Total Industry	R24 971,2	R24 938,8	-0,1%

Source: Stats SA: Accommodation data cuts, May 2019

2.2.3 Average income per stay unit night sold

The figure below indicates the average income per night for stay unit sold for 2018 compared to 2017. The total accommodation industry had a 2.8% increase in the average income per stay unit night sold moving from R1 025 in 2017 to R1 053 in 2018. Other accommodation establishments had the highest increase of 11.1% in the average income per night for stay unit sold for 2018 compared to 2017. This results are similar to the total income received from accommodation establishments which also indicated that other accommodation establishments had a 5.8% increase in income for 2018 compared to 2017. Guest houses and guest farms had a declining growth of -6.2% moving from R1 344.50 in 2017 to R1 261.80 in 2018.

Figure 12: Average income per stay unit night sold: 2017-2018



Accommodation Category	Hotels	Caravan parks and camping sites	Guest houses and guest farms	Other Accommodation	Total industry
% change 2018 compared to 2017	0,6%	4,6%	-6,2%	11,1%	2,8%

Source: Stats SA: Accommodation data cuts, May 2019

2.2.4 Industry occupancy rate: 2017-2018

The fluctuation in tourist numbers, seasonality, and economic impacts on tourists' travel and spending behaviour are some of the indicators that could influence the level of occupancy and revenue generated in the accommodation industry. The average seasonally adjusted occupancy rate for 2018 was 55.7%, which was an increase from to 52.9% in 2017.

Table 4: Occupancy rate: 2017-2018

Accommodation categories	Seasonally Adjusted		
	2017	2018	% Change
Occupancy rate – Hotels	52,3	55,8	6,7%
Occupancy rate - Caravan parks and camping sites	35,1	37,2	6,1%
Occupancy rate - Guest houses and guest farms	42,8	41,2	-3,7%
Occupancy rate: Other Accommodation	62,8	59,9	-4,6
Occupancy rate - Total industry	52,9	55,7	5,3%

Source: Stats SA: Accommodation data cuts, May 2019

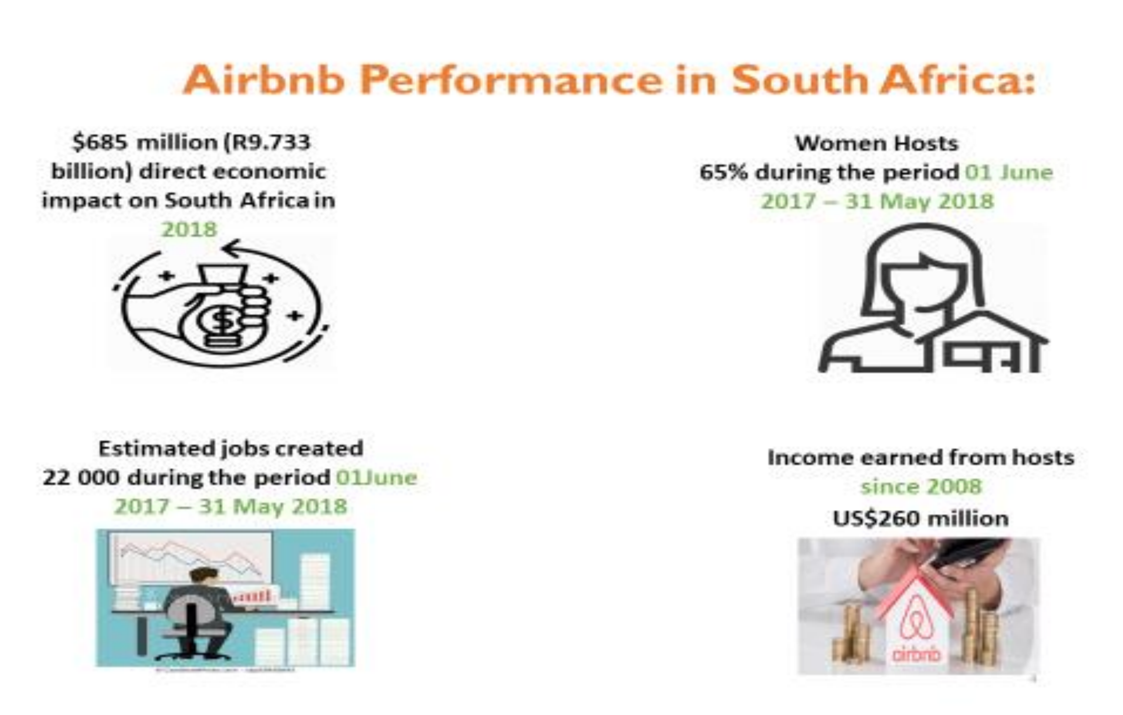
2.3 Airbnb Performance in South Africa

Over the years, the tourism sector has seen a number of new accommodation platforms being used by tourists namely coach surfing, rent a home and Airbnb. This section will focus on the performance of Airbnb in South Africa since the performance reports for the other platforms are not available.

Airbnb is an online marketplace that connects people who want to rent out their homes or accommodation establishment with people who are looking for accommodation in a destination for different purpose of visit including tourism. It currently covers more than 81,000 cities and 191 countries worldwide (Investopedia, 2019). Airbnb was introduced in 2008 in South Africa. The figure below indicates the performance of Airbnb in South Africa.

Airbnb reported that there was an estimated $685 million (R9.733 billion) direct economic impact on South Africa in 2018. The total income earned from hosting and guest activities was US$678 million. Airbnb has indicated that a total of 22 000 jobs were created by Airbnb and 65% of women were hosts for the same period under review. Since 2008, a total of US$260 million was earned by hosts in South Africa (Airbnb, 2018). Tourists are therefore using accommodation establishments that are different from the formal accommodation such as hotels and guest houses. Further research should be conducted to get an understanding why other visitors prefer to use Airbnb rather than booking the formal accommodation establishments. This can assist formal accommodation establishments to understand different traveller’s needs in line with the current trends.

Figure 13: Airbnb Performance in South Africa



Source: Airbnb, 2018, [Direct economic impact]() and [other indicators]()

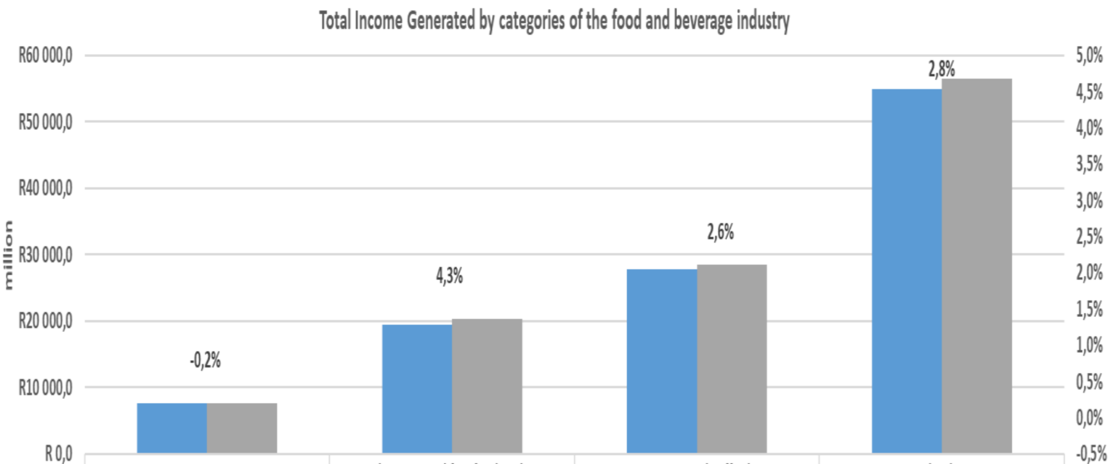
2.4 Food and Beverages industry: 2017-2018

Food and beverage industry includes amongst others restaurants from fast food services to fine dining as well as pubs, bars, nightclubs and lounges. This sub-section provides a summary of the performance of the food and beverages industry focusing mainly on income generated as an indicator. This section also provides summary of top five fast food franchises in South Africa based on their income.

2.4.1 Food and Beverages industry income: 2017-2018

Measured in constant prices, the average monthly income of the food and beverages industry was about R 4 701 million in 2018 which led to a total annual income of about R 56 418 million. This was an increase from an average monthly income of R4 573 million in 2017 and an increase of 2.8% of annual income from R54 877 in 2017. Figure below indicates the total annual income generated by the food and beverages industry by category.

Figure 14: Total income generated by categories of the food and beverages industry: 2017-2018



	Catering services	Take away and fast food outlets	Restaurants and coffe shops	Total Industry
2017	R7 573,6	R19 529,5	R27 774,3	R54 877,4
2018	R7 556,8	R20 371,2	R28 489,9	R56 417,9
% Growth	-0,2%	4,3%	2,6%	2,8%

Source: Stats SA: Accommodation data cuts, May 2019

As indicated in the table below, the contribution of income to food and beverages industry is mainly from the restaurants and coffee shops which contributed more than 50% during 2017 and 2018. Take-away and fast food outlets contribution was 35.6% in 2017 which remained almost flat in 2018 (36.1%).

Table 5: Share of income by food and beverage industry: 2017-2018

Type of food and beverage industry	2017	2018
Restaurants and coffee shops	50.6%	50.5%
Take-away and fast food outlets	35.6%	36.1%
Catering services	13.8%	13.4%

Source: Stats SA: Food & Beverage data cuts, May 2018

2.4.2 Top Five Fast Food Brands in South Africa

As already indicated take-away and fast food outlets contributed more than 35% to income generated by food and beverages industry during 2017 and 2018. This can be an indication of the importance of this sub-industry which is dominated by businesses that are fast food franchises. According to the 2017 report on the food and beverages industry landscape in South Africa published by Insight Survey (a company of B2B market research) findings from the study indicated that that Kentucky Fried Chicken (KFC) was ranked as the number one fast food take away in South Africa leading with a revenue of R8.7 billion followed by McDonalds with R4.3 billion and Nando's (R2.3

billion). Although it may look like some brands are not performing well compared to others this might also depend on the number outlets they have within the country. According to Business tech, there was a total 840 KFC outlets in 2017 while McDonalds had 241 outlets.

Figure 15: Top Fast Food Franchises in South Africa: 2017

Source: [B2B Market Research, 2018]

2.5 Airline Industry Performance: 2017-2018

South Africa has three main international airports namely; O.R. Tambo International, Cape Town International and King Shaka International Airports. There are also regional airports in which are either privately owned or owned by the government. Information relating to the performance of privately owned airports in South Africa could not be sourced therefore the performance of ACSA airports will be reported in this section of the report. ACSA is responsible for managing nine of the stated-owned airports which are:

- O.R. Tambo International Airport
- Cape Town International Airport
- King Shaka International Airport
- Bram Fischer International Airport

- ❖ Upington Airport
- ❖ Port Elizabeth Airport
- ❖ East London Airport
- ❖ George Airport
- ❖ Kimberley Airport

This section of the report provides the performance of aircraft and passenger movements in ACSA airports within South Africa.

2.5.1 Aircrafts arriving to South Africa: 2017-2018

The table below indicates the total number aircrafts arriving in ACSA airports for 2017 and 2018. There has been a decline of -2.3% in the total number of aircraft arriving in 2018 (260 321) compared to 2017 (266 365). The decline was mainly due to the number of unscheduled and domestic aircraft arriving which declined by -1.3% and -3.1% respectively. The decline in domestic aircrafts arriving in ACSA airports could be due to amongst the grounding of one of the domestic airlines during 2018 namely SA Express (Finance24, July 2018).

Table 6: Arriving Aircraft to South Africa: 2017-2018

Arriving Aircrafts	2017	2018	Difference	% Change
Domestic	141 028	136679	-4349	-3.1%
Regional	13 212	12 348	-864	-6.5%
International	38 566	38 713	147	0.4%
Unscheduled	73 559	72 581	-978	-1.3%
Total	266 365	260 321	-6 044	-2.3%

Source: ACSA data, 2018

2.5.2 Passenger arrivals movements: 2017-2018

Table below shows the total passengers arriving in 2018 compared to 2017. Total international passenger arrivals increased by 1.7% in 2018 to 12 451 402 passengers, compared to 12 237 602 in 2017. Regional arrivals decreased by -2.1% in 2018 compared to 2017. Domestic passenger arrivals experienced an increase of 2.0% in 2018 compared to 2017. Total passenger arrivals increased by 1.7% in 2018 compared to 2017.Unscheduled had the highest decline of -10.5% in 2018 compared to 2017.

Table 7: Arriving passengers to South Africa by region: 2017-2018

Arriving Passengers	2017	2018	Difference	% Change
International	5 802 754	5 921 173	118 419	2.0%
Regional	564 296	552 374	-11 922	-2.1%
Domestic	5 802 754	5 917 172	114 418	2.0%
Unscheduled	67 798	60 683	-7 115	-10.5%
Total	12 237 602	12 451 402	213 800	1.7%

Source: ACSA data, 2018

2.5.3 Passenger departure movements: 2017-2018

Table below shows the total passengers departing in 2018 compared to 2017. Total passengers departing decreased by -2.5% in 2018 which was a total of 20 188 393 passengers in 2018 compared to 20 706 590 in 2017.

Total international passengers departing decreased by -4.0% moving from 14 150 989 in 2017 to 13 582 760 in 2018. Regional arrivals also decreased by -2.8% in 2018 compared to 2017. In 2018, unscheduled and domestic departing passengers had an increase of 9.6% and 1.0% respectively.

Table 8: Departing passengers from South Africa by region: 2017-2018

Departing Passengers	2017	2018	Difference	% Change
International	14 150 989	13 582 760	-568 229	-4.0%
Regional	562 324	546 534	-15 790	-2.8%
Domestic	5 940 667	6 001 413	60 746	1.0%
Unscheduled	52 610	57 686	5 076	9.6%
Total	20 706 590	20 188 393	-518 197	-2.5%

Source: ACSA data, 2017

2.6 Car Rental Performance in South Africa: 2017-2018

Car rental is an important industry for the tourism sector since tourists often use car rentals to travel within the country. Recent data from Euromonitor indicates that the rental value sales in South Africa for 2017 was R6.8 billion which grew by 7.7% to reach R7.3 billion in 2018. The figures below indicate that bookings from business tourism continue to drive the growth of car rental in 2017 and 2018. The Travel & Tourism Competitiveness Index (TTCI) for indicates that South Africa was ranked 43 out of 140 countries for the presence of major car rental companies in the country (WEF, 2019).

Table 9: Car rental sales in South Africa

	**2017 R million**	**2018 R million**	**% Change**
Business Car rental	3 663.8	3 968.5	8,3%
Leisure Car rental	2 256.6	2 370.1	5,0%
Insurance replacement	922.6	968.6	5,0%
Total Car rental value sales	6 843.1	7 370.2	7,7%

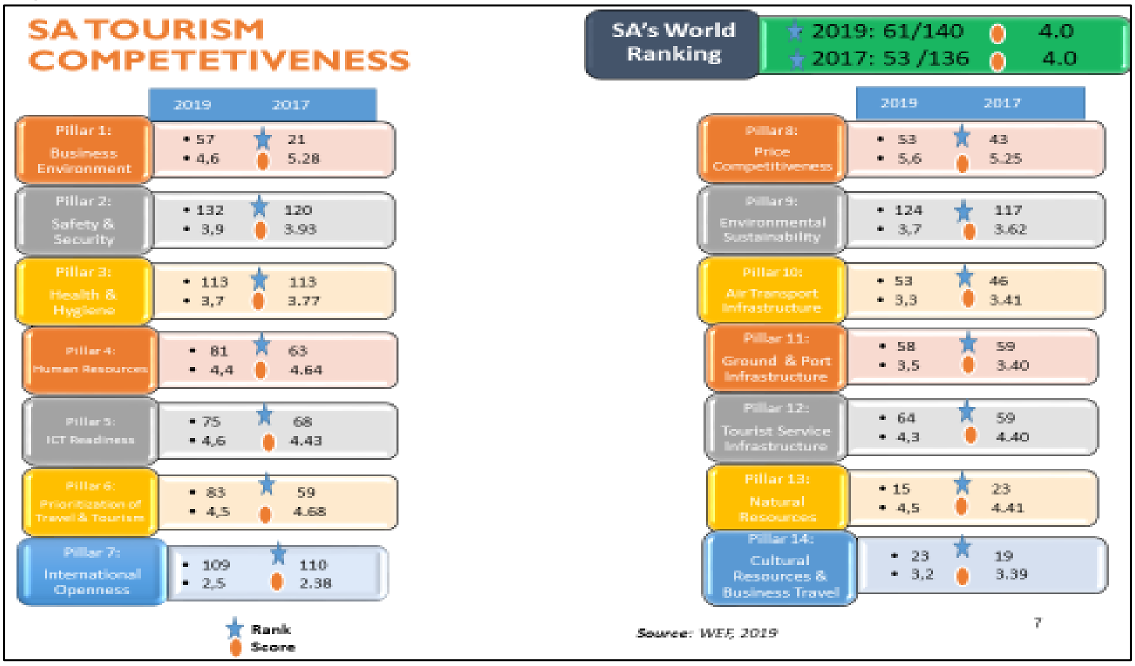
Source: Euromonitor, 2019

2.7 The Travel & Tourism Competitiveness Index (TTCI) for South Africa: 2019

The World Economic Forum (WEF) is responsible for developing the Travel and Tourism Competitiveness Index (TTCI). The main aim of the TTCI is to measure a set of factors and policies of country that enable the sustainable development of the tourism sector. This section of the report indicates the TTCI results for South Africa for 2019 compared to 2017 since the report is published biennially (every two years).

Out of 140 countries, South Africa was ranked 61st position in 2019 compared to 53rd position out of 136 countries in 2017. In the sub-Saharan region, South Africa was the top scorer for cultural resources and business travel pillars which was due to the country's stadiums and total number of international association meetings hosted for 2019. South Africa also ranked high in natural (15th) and cultural resources (23rd).

Figure 16: Tourism Competitiveness Index for South Africa: 2019



Source: WEF, 2019

CHAPTER THREE: SOUTH AFRICAN INBOUND TOURISM PERFORMANCE

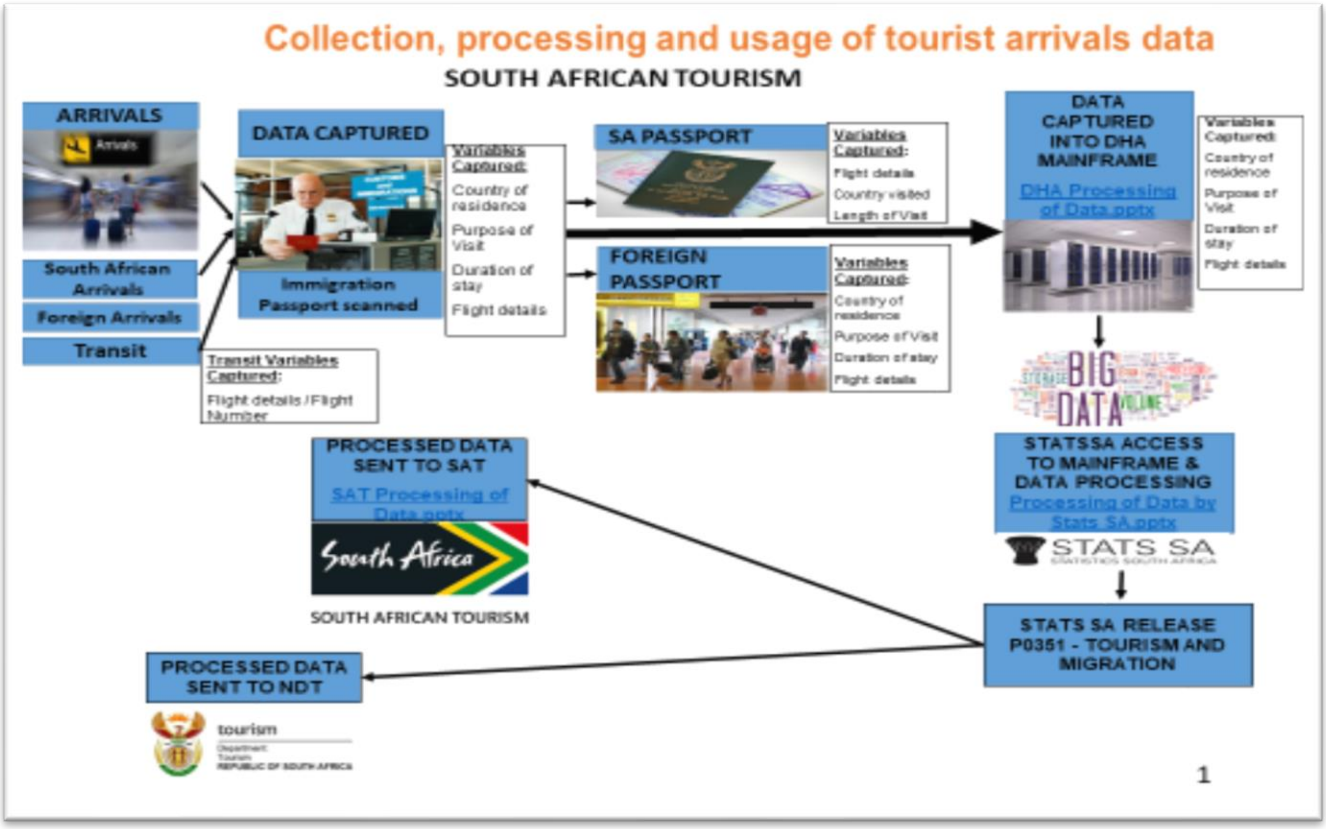
Tourism is regarded as an export industry as tourist arrivals from other countries spend on tourism products and services such as accommodation, transport and other related products within the country. By generating tourist exports through receipts, countries increase their foreign currency earnings and contribution to the economy's growth.

This section provides an analysis of South African tourism inbound performance focusing on key indicators such as total tourist arrivals and spend.

3.1 Collection, processing of tourist arrivals in South Africa

In South Africa, the Department of Home Affairs (DHA) is responsible for collecting information of all migration data. The figure below aims to indicate the collection and processing of foreign arrivals data which includes people travelling for tourism purposes.

Figure 17: Data collection and processing of foreign arrivals (including tourists)



As seen in the figure above, travel information is firstly collected by immigration officers at all land, air and sea ports of entry on all travellers arriving into or departing from South Africa. The information is sourced directly from travel documents either by scanning them or by capturing information from the travel documents onto the port's electronic database. Some of the information not indicated in the traveller's document is sometimes requested verbally and captured in the system accordingly. Individual ports regularly transmit the data to the national database i.e. DHA's population Movement Control System (MCS). Statistics South Africa (Stats SA) then downloads the migration data covering a particular calendar month from the system. The processing of the data to produce amongst others data on tourist arrivals may be time-consuming therefore there is a two-month lag in the release of the monthly data by Stats SA.

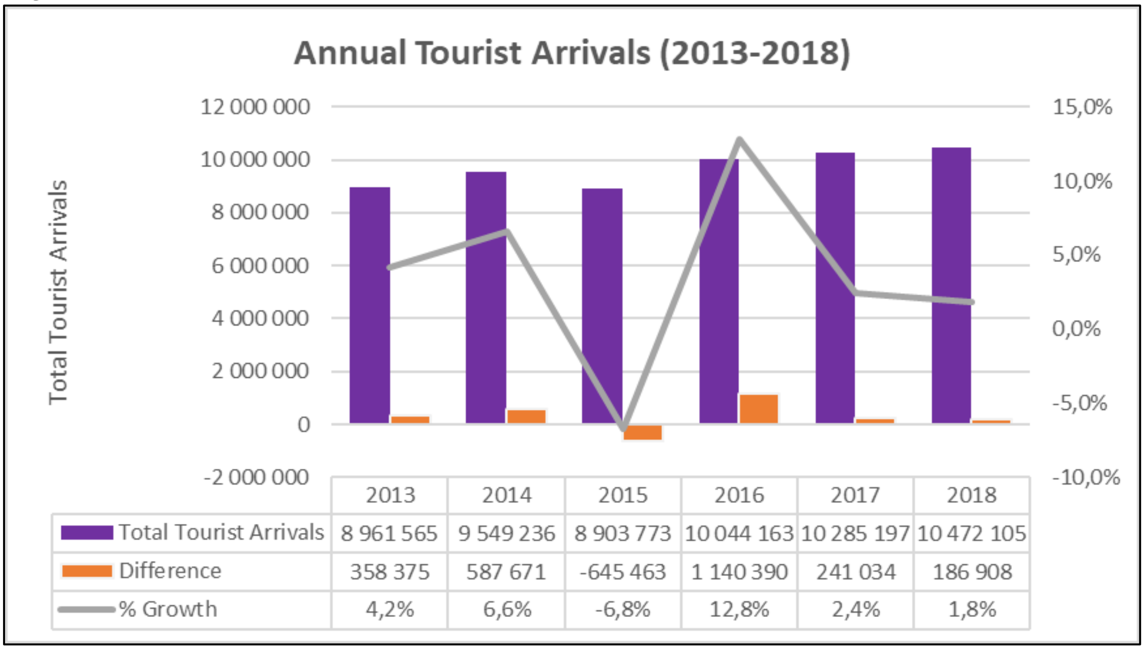
According to the UNWTO and definitions published by Stats SA, a tourist is any visitor travelling to a place other than that of his/her usual environment for more than one night but less than twelve months, and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited. By applying the definition of a tourist and the purpose of visit relating to tourism activities as defined by UNWTO, Stats SA is able to separate the number of tourists from the total travellers to South Africa using the purpose of visit and the length of stay (more than 24 hours). The data is published in the monthly Tourism and Migration report with a two-month lag.

Stats SA can only provide data on tourist arrivals and SA Tourism conducts a Tourism Departure Survey on a monthly basis to collect information on other key tourism indicators such as spend, geographic spread and seasonality index of tourist visiting the country The methodology used for this survey can be sourced from SA Tourism's Annual Tourism Performance Reports.

3.2 Tourists Arrivals to South Africa: 2018

South Africa is considered the largest destination in the Sub-Saharan region reaching a record breaking of more than 10 million international tourist arrivals annually from 2016-2018. In 2018. a total of 10 472 105 tourist arrivals was recorded which was a growth of 1.8% (186 908) compared to 2017. Figure below indicates tourist arrivals for the period 2013 to 2018. Tourist arrivals to the country have been increasing from 2013 except for a decline of -6,8% recorded in 2015 compared to 2014. The performance recovered in 2016 with a double digit growth of 12,8% compared to 2015. Tourist arrivals continued to grow in 2017 and 2018, however the growth was slower during these two years.

Figure 18: Number of International tourist arrivals: 2013-2018



	2013	2014	2015	2016	2017	2018
Total Tourist Arrivals	8 961 565	9 549 236	8 903 773	10 044 163	10 285 197	10 472 105
Difference	358 375	587 671	-645 463	1 140 390	241 034	186 908
% Growth	4,2%	6,6%	-6,8%	12,8%	2,4%	1,8%

Source: Stats SA Tourism & Migration data

Although the growth in tourist arrivals has been growing at a slower rate lately, the potential of this sector to accelerate the economic growth within the country did not go unnoticed by government hence it has been identified as one of the sectors that could assist in accelerating the economic growth within the country.

It is on this basis that the Department of Tourism together with its stakeholders has developed and revised the National Tourism Sector Strategy (NTSS) which sets out an agenda towards the contribution of the tourism sector to amongst others GDP and employment. It is further indicated in the NTSS that to accelerate the growth of inbound tourism, key tourism stakeholders could enhance the international marketing efforts that could attract tourists from prioritised markets and segments, as well as enhanced brand management (NTSS, 2016-2026).

Table below indicates the total tourist arrivals to South Africa by region for the period 2018 compared to 2017. African region remains the main source of tourist arrivals to South Africa contributing almost 74.1% to the total tourist arrivals in 2018. The remaining

25.4% of South Africa's International tourist markets are from long-haul overseas markets. The majority of these overseas markets consisted of travel from regions such as Europe (15.5%), North America (4.2%) and Asia (3.0%) in 2018.

Arrivals from the long haul markets did not perform very well in 2018 compared to 2017. Total tourist arrivals from the overseas market declined by -1.5% (-40 987) during 2018 compared to 2017 and this decline was influenced by a decline recorded in most of the overseas markets. Tourist arrivals from the Middle East recorded the highest decline of -10.8% followed by Europe (-2.5%), Asia (-2.0%), and Australasia (-1.8%) during this period.

The declining growth recorded in the Middle East was driven by Iran and Saudi Arabia with both countries recording a decline of -37.5% (-1 992) and -27.0% (-3 015) respectively. Most countries within the Europe region recorded a decline in tourist arrivals with Portugal having the highest decline of -17.3% (-6 655) for the period under review. The decline in Asia was driven by a decrease recorded in tourist arrivals from most countries from this region including India and China with a decline of -4.6% (-4 493) and -0.2% (-154) respectively for the same period under review. Compared to other regions, the Central and South America region had the highest growth of 8.3% (8 934) during this period. The growth from this region was driven by an increase of about 30.7% (4 565) of tourist arrivals from Argentina. North America recorded an increase of 1.5% for the period under review. Tourist arrivals from Africa increased by 3.0% (223 286) during the same period under review.

Table 10: International tourist arrivals by region: 2017-2018

Region	2017	2018	Difference	% Difference
EUROPE	1 660 848	1 618 762	-42 086	-2.5%
NORTH AMERICA	437 903	444 671	6 768	1.5%
CENTRAL & SOUTH AMERICA	107 582	116 516	8 934	8.3%
AUSTRALASIA	133 713	131 348	-2 365	-1.8%
MIDDLE EAST	55 906	49 867	-6 039	-10.8%
ASIA	317 181	310 982	-6 199	-2.0%
TOTAL OVERSEAS	2 713 133	2 672 146	-40 987	-1.5%
TOTAL AFRICA	7 559 342	7 786 357	227 015	3.0%
Unspecified	12 722	13 602	880	6.9%
GRAND TOTAL	10 285 197	10 472 105	186 908	1.8%

Source: Stats SA Tourism & Migration report December 2018

3.3 Top international overseas and African tourist source markets: 2018 compared to 2017

Table below shows rankings of top ten overseas source markets. Comparing Jan-December 2018 with Jan-December 2017, most top 10 overseas markets recorded a decline in tourist arrivals except for Brazil (4.0%), USA (1.7%) and Canada (0.9%). Despite this decline, all of the top ten overseas markets remained in the same position except for China which improved its position moving from 8th to 7th position and India dropped from 7th to 8th position in 2018 compared to 2017. UK remains the main source market from overseas even though this country recorded a declining of -3.8%.

Table 11: Top ten overseas international tourist markets: 2018 compared to 2017

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	430 708	1	447 901	-3,8%
USA	2	376 892	2	370 747	1,7%
Germany	3	343 229	3	349 211	-1,7%
France	4	186 251	4	196 165	-5,1%
The Netherlands	5	146 925	5	159 621	-8,0%
Australia	6	115 846	6	116 257	-0,4%
China	7	96 915	8	97 069	-0,2%
India	8	93 428	7	97 921	-4,6%
Brazil	9	70 539	9	67 797	4,0%
Canada	10	67 779	10	67 156	0,9%

Source: Stats SA Tourism & Migration report December 2018

Table below ranks the top ten African source markets for the period 2017and 2018. Most of the top ten African markets remained at the same position for the period under review except for Angola and Nigeria which swapped positions, Angola moved to the 9th position and Nigeria moved to the 10th position. Most countries from the top ten African source markets recorded an increase in tourist arrivals during this period except for Zambia (-4.1%), Namibia (-4.0%), and Lesotho (-0.5%). Angola had experienced the highest growth of 31.6%, which translates to additional 15 560 tourist arrivals from Angola during the period under review. Zimbabwe remains the main source of tourist arrivals from the continent and this country recorded a growth of 8,3% during the period under review. Although Nigeria is one of the few countries from Africa that requires a visa to visit the country, it recorded a growth of 5,6% in tourist arrivals during 2018 compared to 2017.

Table 12: Top ten African tourist source markets: 2018 compared to 2017

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	2 208 930	1	2 039 932	8,3%
Lesotho	2	1 739 188	2	1 747 211	-0,5%
Mozambique	3	1 360 896	3	1 339 245	1,6%
Swaziland	4	883 735	4	876 992	0,8%
Botswana	5	688 566	5	681 379	1,1%
Namibia	6	200 367	6	208 747	-4,0%
Malawi	7	197 317	7	175 014	12,7%
Zambia	8	165 968	8	173 033	-4,1%
Angola	9	64 859	10	49 299	31,6%
Nigeria	10	53 769	9	50 921	5,6%

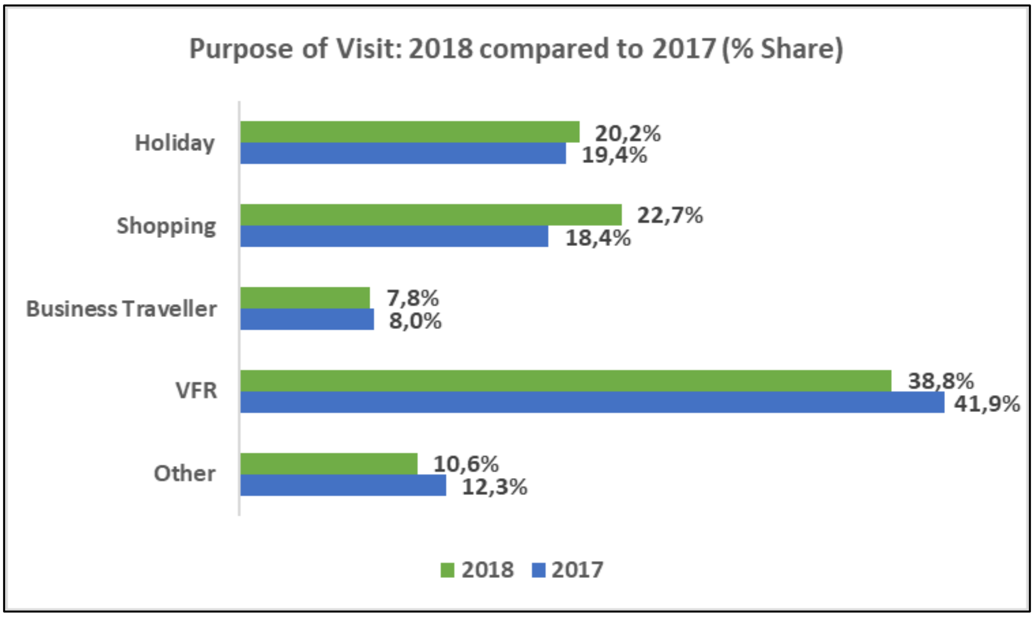
Source: Stats SA Tourism & Migration report December 2018

As already indicated, data for indicators such as purpose of visit, spend and provincial share of tourist arrivals is collected by SA Tourism through the monthly Tourism Departure Survey conducted at main borders of entry to the country including some international airports. The data is collected from tourists when leaving the country to get more understanding of their experience while travelling within the country. Sections below provide an analysis of purpose of visit, geographic spread and total spend by international tourists for the period 2018 compared to 2017.

3.4 Main purpose of visit for International tourist arrivals: 2018

Tourists often travel to different destinations for different purposes. Understanding the different purpose of visit categories that influence tourists' travel is important when it comes to marketing a destination. The purpose of visit for tourism includes amongst others travelling to visit friends and relatives, holiday, shopping and business in line with definition of a tourist. The business category includes tourists travelling for business and MICE purposes, the shopping category includes tourists who are shopping for personal and shopping for business reasons. The main reasons for international tourists to visit South Africa in 2018 were to visiting friends and relatives (VFR) (38.8%); holiday (20.2%); and shopping (22.7%), as indicated in the figure below. The share of tourists travelling for holiday purposes went up in 2018 compared to 2017 while those whom were travelling to VFR went down from 42% in 2017 to 39% in 2018.

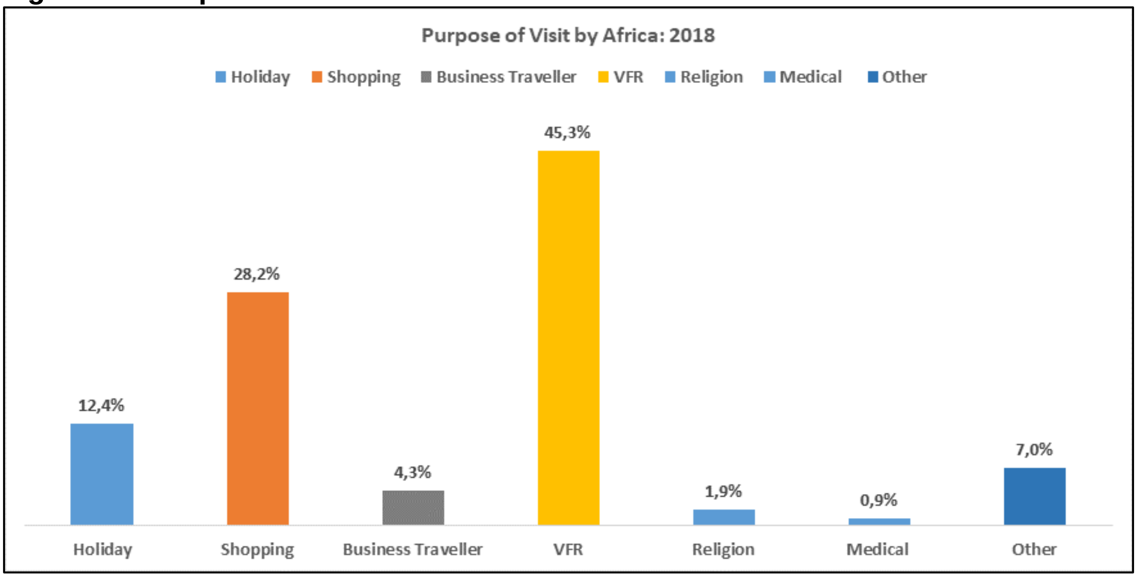
Figure 19: Main purpose of visit for international tourist arrivals: 2018



Source: SA Tourism Performance Report: January-December 2018, 2019

The results in the figure below indicate the main purpose of visit for tourist travelling from Africa to the country for the period 2018 compared t0 2017.

Figure 20: Purpose of Visit for tourist arrivals from Africa: 2018

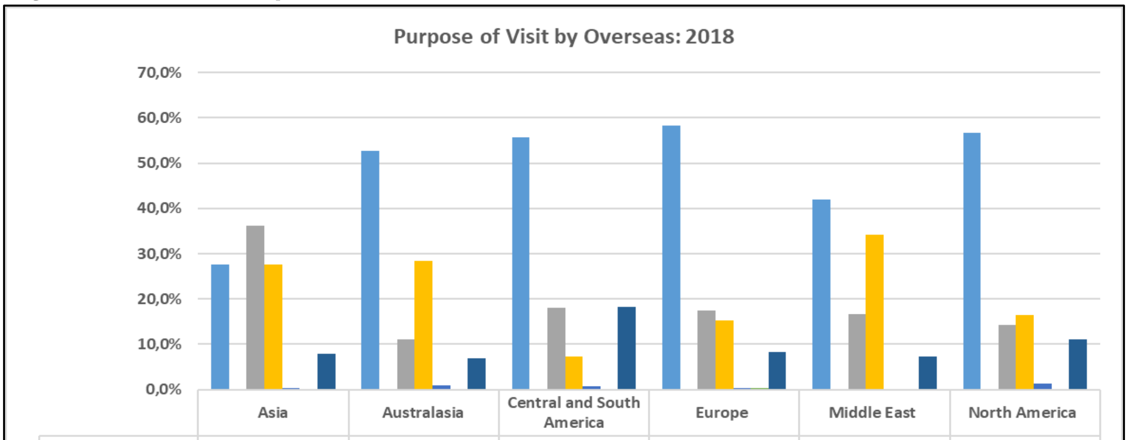


Source: SA Tourism Performance Report: January-December 2018, 2019

Tourists from the African region predominantly visited South Africa for VFR purposes (45.3%) followed by shopping purposes (28.2%) and holiday (12.4%) in 2018. Less than 10% of tourists from the Africa region visited South Africa for business (4.3%), religion (1.9%) and medical (0.9%).

Figure below indicates the main purpose of visit results for tourist from overseas regions namely; Asia, Australasia, Central and South America, Europe, Middle East and North America.

Figure 21: Main Purpose of Visit for Overseas Markets: 2018



	Asia	Australasia	Central and South America	Europe	Middle East	North America
Holiday	27,7%	52,7%	55,7%	58,3%	41,9%	56,6%
Shopping	0,2%	0,0%	0,0%	0,0%	0,0%	0,1%
Business Traveller	36,1%	11,0%	18,0%	17,4%	16,7%	14,3%
VFR	27,7%	28,3%	7,2%	15,2%	34,1%	16,4%
Religion	0,3%	1,0%	0,7%	0,4%	0,0%	1,4%
Medical	0,1%	0,2%	0,0%	0,4%	0,1%	0,2%
Other	7,9%	6,8%	18,3%	8,3%	7,2%	11,0%

Source: SA Tourism Performance Report: January-December 2018, 2019

The results for the regions within the overseas markets indicated that more than half of tourists from Europe (58.3%), Central and South America (55.7%) and Australasia (52.7%) main purpose for visiting South Africa was for holiday purposes. Compared to other regions, most tourist from Asia travelled for business purposes to South Africa, accounting for about 36.1% of tourists arriving from this region. The Middle East was leading with tourists visit South Africa for VFR purposes (34.1%). This analysis highlights the importance of market agencies catering to the different purposes of travel for international markets.

3.5 Length of stay for international tourist arrivals 2018 compared to 2017

Averagely, the length of stay for international tourists was shorter in 2018 compared to 2017. The length of stay results for 2018 indicate that the number of nights spent by international tourists went down from 12.2 nights in 2017 to 11.7 nights in 2018. Increasing the length of stay of tourist arrivals could be one of the key targets to increase the contribution of tourism to the economy of any country as the longer tourists stay in a country, the more they are likely to spend.

3.6 Total Foreign Direct Spend (excluding capital expenditure): 2018 compared to 2017

One of the indicators that is used to measure the importance of tourism for the economy is how much tourists spend while they are travelling within the country, given that their expenditure contributes to the country's economy as well as job creation. Table below indicates that the total foreign direct spend was R82.5 billion in 2018, which was an increase of 2.2% from R80.7 billion in 2017.

Table 13: Spend by region: 2018 compared to 2017

Region	2017	2018	%Change	% share 2017
Africa	R 34 962 101 570	R 35 424 473 536	1,3	42,9
Americas	R 10 716 441 856	R 10 979 456 867	2,5	13,3
Asia & Australasia	R 6 612 875 472	R 7 646 588 875	15,6	9,3
Europe	R 27 401 440 175	R 27 445 715 268	0,2	33,3
Middle East	R 1 032 155 440	R 1 032 393 717	0,0	1,3
Total Foreign Direct Spend	R 80 725 014 513	R 82 528 628 263	2,2	100,0

Source: SA Tourism 2018 data cuts

The importance of arrivals from Africa could be seen by their contribution to total foreign direct spend which was about 42.9% and the rest of the contribution was from overseas markets. The contribution from Africa is driven by volume. It should be noted that tourists from the continent spend averagely less than tourists from overseas markets per trip. Air-bound markets show a much higher average spend per trip, with the Americas spending an average of R22 911, Europe R19 803 and Australia R19 288 while the Africa market only spend R4 686 per trip on average. The average expenditure for international tourist arrivals in South Africa was R8 200 per trip during 2018 which was a decline from R8 400 in 2017.

3.6.1 Total Foreign Direct Spend by top five African Source Markets

The top five African markets by total foreign direct spend are provided in the table below. Most of the total spend from African markets was from Zimbabwe with a total spend of R12.3 billion followed by Mozambique (R3.6 billion) and Lesotho (R3 billion) in 2018. However, it should be noted that the total spend from Zimbabwe was driven by volume and according to SA Tourism data, top spenders from the African market were from the

Democratic Republic of Congo with an average spend of R25 768 per trip in 2018 which was up from an average spend of R24 606 per trip in 2017. Nigeria overtook Angola as top spender in 2018 with an average spend of R22 633 per while Angolans spend R21 382 per trip during 2018.

Table 14: Total Foreign Direct Spend by top five African Markets: 2018

Rank	Country	Total Foreign Direct Spend 2017	Total Foreign Direct Spend 2018
1	Zimbabwe	R 10 709 010 578	R12 295 567 710
2	Mozambique	R 4 579 821 815	R3 618 520 675
3	Lesotho	R 3 421 816 737	R2 923 226 893
4	Malawi	R 2 205 925 494	R 2 887 019 478
5	Zambia	R 3 375 601 275	R 2 666 235 802

Source: SA Tourism Performance Report: January-December 2018, 2019

3.6.2 Total Foreign Direct Spend by top five overseas Markets: 2018

The top five overseas markets by total foreign direct spend are provided in table below. Most of the total spend from overseas markets was from USA with a total spend of R8 billion followed by the UK (R7.8 billion) and Germany (R5.9 billion). On average tourists from the USA spent about R23 471 per trip during 2018 which was a decline from average spend of R24 963 per trip in 2017. Although tourists from China spend lesser than tourists from the USA during the period under review their total average spend per trip went up by 18,7% in 2018 from an average spend of R15 881 per trip in 2017 to R18 858 per trip in 2018. Finland reordered the highest growth (24,9%) in average spend during 2018 compared 2017, growing from an average spend of R17 627 per trip in 2017 to R22 013 per trip in 2018.

Table 15: Total Foreign Direct Spend by top five overseas Markets: 2018

Rank	Country	Total foreign Direct Spend - 2017	Total Foreign Direct Spend 2018
1	USA	R 8 022 515 265	R7 939 353 793
2	UK	R 7 769 928 423	R7 808 956 698
3	Germany	R 5 747 830 921	R5 864 414 900
4	France	R 2 764 800 480	R2 713 954 655
5	Netherlands	R 2 488 649 285	R2 516 677 077

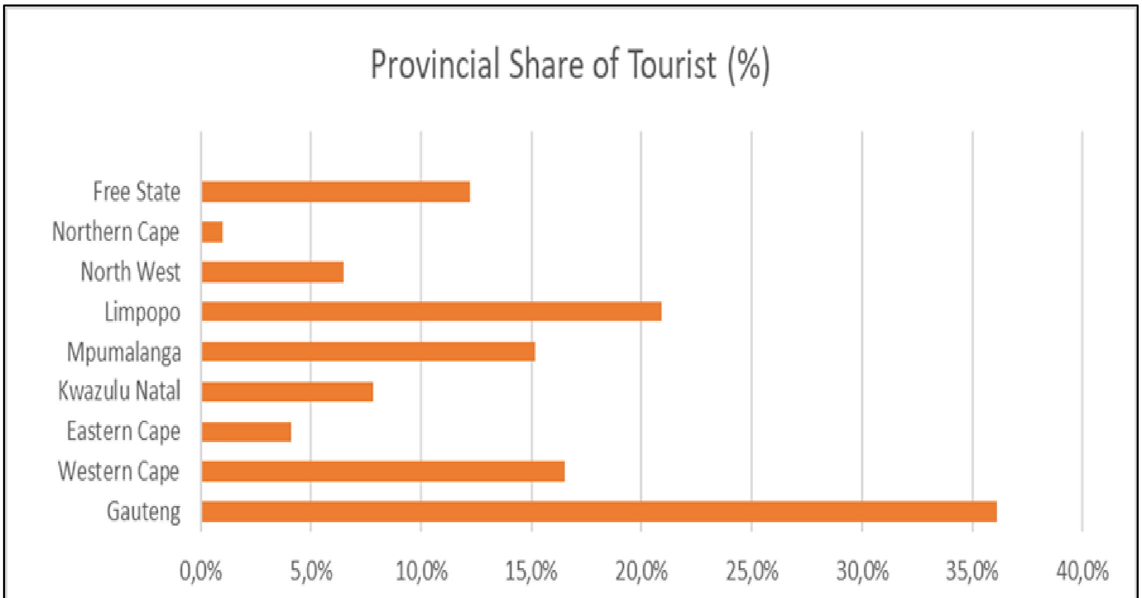
Source: SA Tourism Performance Report: January-December 2018, 2019

3.7 Provincial share of tourist arrivals: 2018

The table below shows the provincial share of total foreign tourist trips. Provincial tourist arrivals are counted by the number of trips taken by a foreign tourist e.g. the number of trips for a tourist from the UK who visits three (3) provinces in South Africa will be counted as three (3) to correctly report on trips for each province. It is for this reason that the total number of tourists visiting provinces are higher than those reflected in the total tourist arrivals from Stats SA which captures the actual number of foreign tourists into the country which captures one trip when they enter and leave the borders.

Figure below indicates that, in 2018, most international tourists visited Gauteng (36.1%), followed by Limpopo (20.9%) and the Western Cape (16.5%). The three least visited provinces include North West (6.5%), the Eastern Cape (4.1%) and the Northern Cape (1.0%). To increase the impact and benefit of international tourism, provincial marketing agencies should continue to encourage tourists to visit their respective provinces. Tourism planners should also consider developing tourism products that would attract international tourist to the less visited provinces.

Figure 22: Provincial share of tourist arrivals: 2018



	Gauteng	Western Cape	Eastern Cape	Kwazulu Natal	Mpumalanga	Limpopo	North West	Northern Cape	Free State
Share of Tourist	36,1%	16,5%	4,1%	7,8%	15,2%	20,9%	6,5%	1,0%	12,2%

Source: SA Tourism Performance Report: January-December 2018, 2019

CHAPTER FOUR: SOUTH AFRICA'S DOMESTIC TOURISM PERFORMANCE

Domestic tourism plays a critical role in the success of any tourism destination and it also forms the backbone of the sector. According to the Tourism Satellite Account (TSA) released by Statistics South Africa (Stats SA), domestic tourism plays a critical role in the tourism sector as it generates more than half the internal tourism revenue. South Africa aims to increase the impact and spread of domestic tourism through multiple marketing strategies, product development and packaging, and niche market creation. The NTSS key pillars include key elements that will drive the development and growth of the domestic market.

The Department of Tourism has also developed a Domestic Tourism Strategy to increase domestic tourism expenditure (revenue), domestic tourism volume, enhance measures and efforts aimed at addressing seasonality and equitable geographical spread, and enhance the level of the culture of tourism/travel among South Africans (Domestic Tourism Strategy, 2012). Data reported in this section is sourced from SA Tourism's Domestic Tourism Survey.

4.1 Analysis of South African Economy: 2017-2018

Table 17 below aims to describe the performance of the South African economy by focusing on the following indicators such as real GDP, Consumer Price Inflation and employment. The South African economy weakened in 2018 with real GDP having a slight increase of 0.8% which is a decline from 1.4% in 2017. Consumer Price Inflation (CPI) measures the average change in prices over time that consumers pay for a basket of goods and services. In 2018, South Africa's CPI decreased from 5.3% in 2017 to 4.7% in 2018. Unemployment rate was 27.3% in 2017 which remained almost flat in 2018 (27%).

The labour force participation rate measures an economy's active labour force and is the sum of all employed workers divided by the working age population. It refers to the number of people who are either employed or are actively looking for work. The labour force participation rate in 2018 was 55.2% which was a decline compared to 55.4% in 2017.

Table 17: South Africa's Economic Performance

Economic Indicator	2017	2018
South Africa Real GDP	1.4%	0.8%
South Africa Consumer Price inflations	5.3%	4.7%
Unemployment rate	27.3%	27%
Labor force participation rate, total (% of total population ages 15+) (national estimate)	55.4%	55.2%

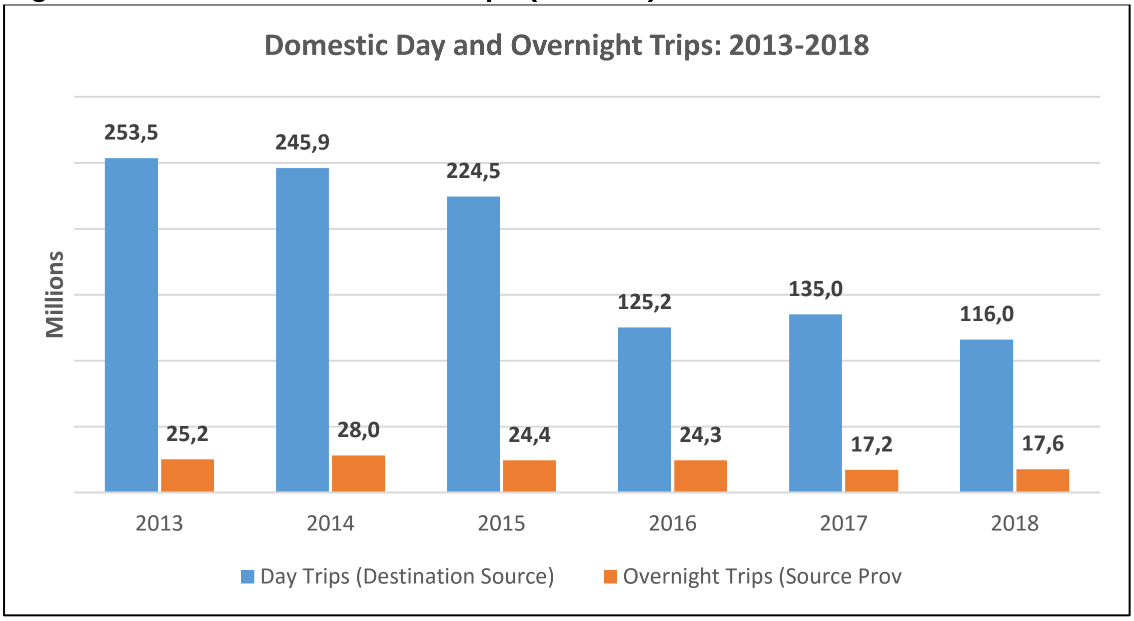
Source: https://data.worldbank.org/indicator/SL.TLF.CACT.NE.ZS

The above analysis is critical to get and understanding of other factors that could affect South Africans in taking a decision when they travel within the country.

4.2 Domestic Day and Overnight Trips: 2013-2018

Figure below shows the number of domestic day and overnight trips taken during the period 2013-2018. In 2013, overnight trips were 25.2 million which was a decline of 0.8% compared to 2012. In 2014, the total overnight domestic trips recorded was 28 million which was an 11% increase compared to 2013. Comparing 2015 with 2014, total overnight domestic trips declined by -12.5% resulting in a total of 24.5 million overnight domestic trips recorded in 2015. In 2016, overnight domestic trips decreased by -0.8% compared to 2015. The possible reasons for the decline in domestic day and overnight trips experienced in South Africa could be linked to the performance of the South African economy over the years. In 2017, total domestic trips recorded was about 17.2 million which was a decline of -29.3% compared to 2016. In 2018, there was a total of 17.6 million total domestic overnight trips recorded which was an increase of 2.9%. Domestic day trips also follow the same trend with a decline from a total of 253,5 million trips in 2013 to 116,0 million trips in 2018.

Figure 23: Number of Domestic Trips (millions):2013-2018



Source: SAT Tourism Provincial data cuts 2018

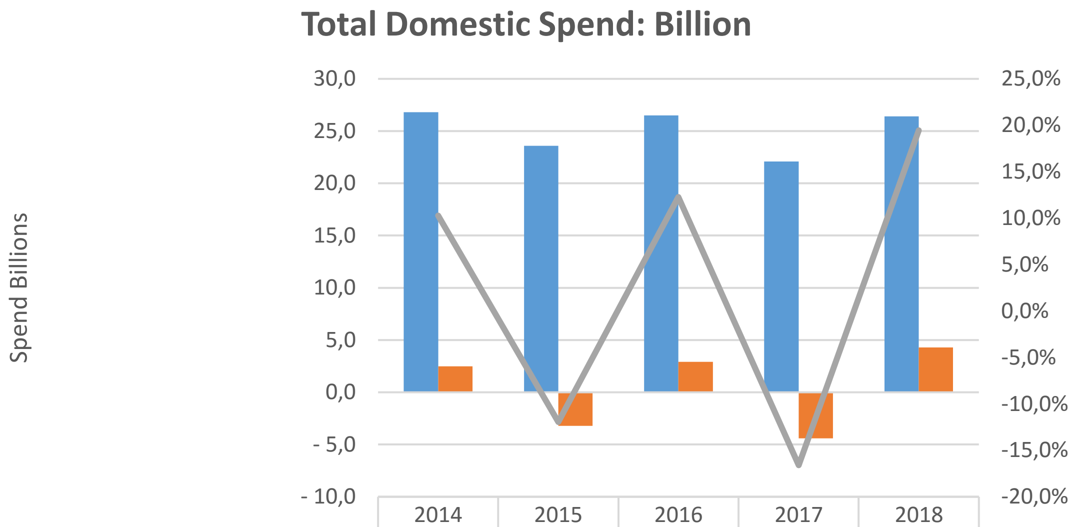
4.3 Domestic Tourism Purpose of Visit and length of Stay

In 2018, the majority of domestic tourists travelled for the main purpose of visiting friends and relatives (VFR) (41%) followed by holiday (31%), business (8%) and religious (3%). In 2018, domestic tourists spent an average of 3.9 nights during their trips which was a slight decline compared to 4.1 nights in 2017.

4.4 Domestic Spend: 2018

Figure below indicates domestic tourism spend for the period 2014 to 2018. Domestic tourism spends decreased from about R26.8 billion in 2014 to R23.6 billion in 2015, indicating a decline of about 11.9%. Domestic tourism spends increased in 2016 by 12.3% (R2.9 billion) compared to 2015. Comparing 2017 with 2016, total domestic spend was R22.1 billion which was a decline of 16.6% (R4.4 billion). In 2018, domestic tourism spends increased by 4.3% moving from R22.1 billion in 2017 to R26.4 billion in 2018.

Figure 24: Total Domestic Spend: 2014-2018

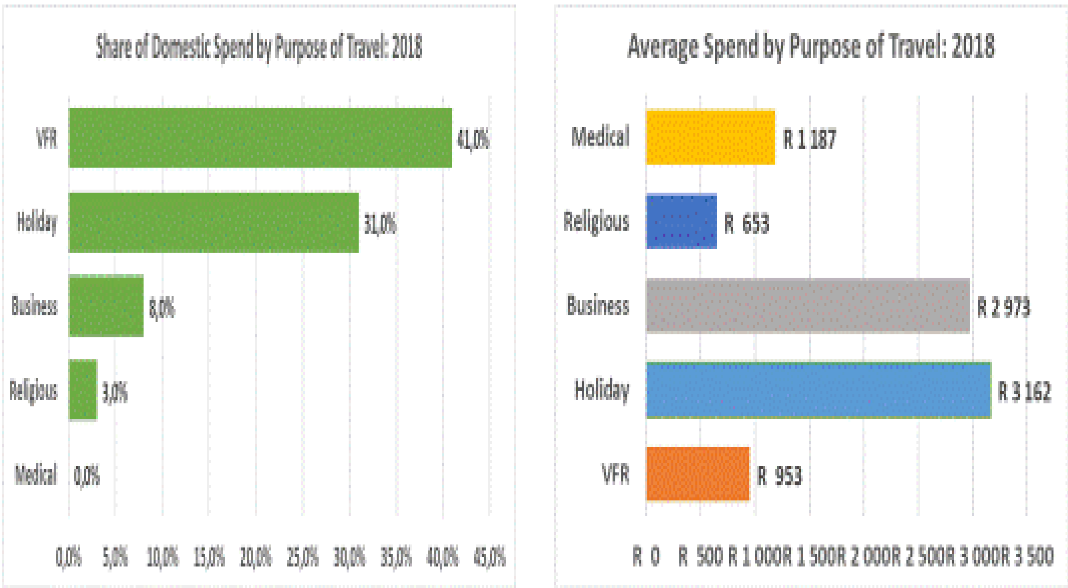


	2014	2015	2016	2017	2018
Total Domestic Spend (billion)	26,8	23,6	26,5	22,1	26,4
Difference (billion)	2,5	- 3,2	2,9	- 4,4	4,3
% Growth	10,3%	-11,9%	12,3%	-16,6%	19,5%

Source: SAT Tourism Provincial data cuts 2018

Figure below indicates the share of domestic spend an average spend by domestic tourists' purpose of visit for the period 2018. The results indicate that domestic tourists who travel for VFR purposes contributed 41.0% of the total domestic spend, followed by holiday (31.0%), business (8%) and religious (4%). The average spend by purpose results indicates that domestic tourists travelling for holiday spend on average more (R3 162), followed by business (R2 973) and medical (R1 187). The least average spend per trip are for VFR (R953) and religious (R653) purposes, as illustrated in figure below. These results indicate the potential of generating greater revenue through holiday and business travel as domestic tourists traveling for these purposes tend to spend more. However, potential lies within the VFR market as this category contributes more to the volume of domestic trips. This could be done by encouraging increased spending and tourist activity during the visitation period from this market or encourage then to take holiday trips.

Figure 25: Share of domestic spend by purpose of visit and average spend by purpose: 2018



Source: SA Tourism Performance Report: January-December 2018, 2019

4.5 Provincial share of domestic trips: 2018

The provincial distribution of domestic tourism trips for 2018 is indicated below in table 18. Domestic tourists travelled more to Limpopo (17.2%), Gauteng (16.6%) and KZN (15.3%) in 2018. Provinces that received less than 10% of domestic trips were the North West (8.4%), Western Cape (6.7%) and Free State (6.1%). These results indicate that domestic tourism campaigns should focus largely on marketing the less visited provinces in order for equal geographical spread.

Table 18: Provincial distribution of domestic trips: 2018

Province	2018	% share
Eastern Cape	2 322 600	12,1%
Free State	1 168 000	6,1%
Gauteng	3 185 200	16,6%
KwaZulu Natal	2 923 900	15,3%
Limpopo	3 295 200	17,2%
Mpumalanga	2 911 400	15,2%
Northern Cape	441 400	2,3%
North West	1 598 600	8,4%
Western Cape	1 288 000	6,7%

Source: SAT Tourism Provincial data cuts 2018

4.6 Top 3 spenders by destination province: 2018

The table below shows the top 3 provincial spenders in the nine provinces. Gauteng was the top spender in most provinces except for the Northern Cape and the Western Cape. The results also show that the destination province is also one of the top three spenders in a province.

Table 19: Top spenders by destination province: 2018

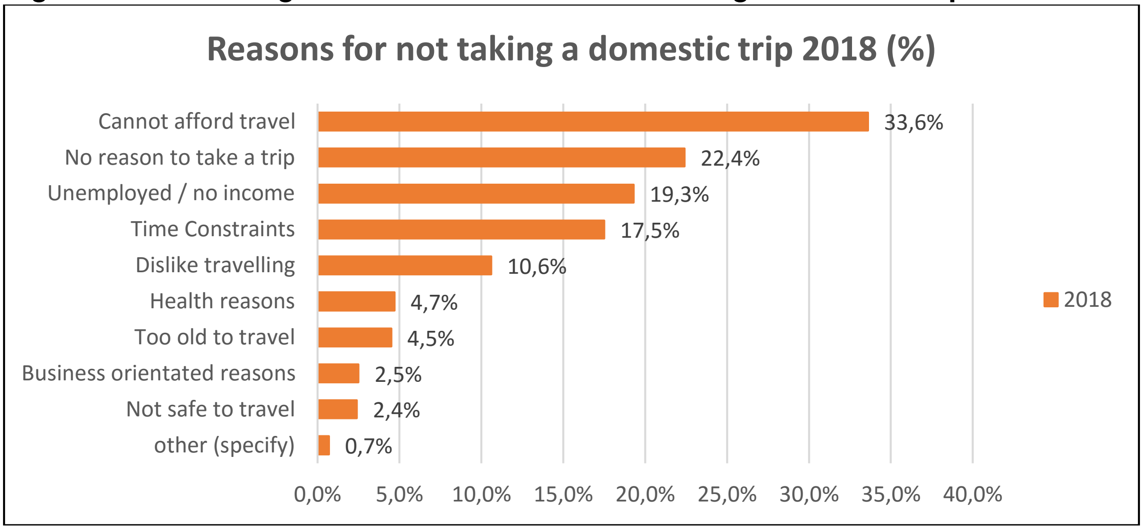
Destination	Top Spender
Eastern Cape	Gauteng Eastern Cape Western Cape
Free State	Gauteng Free State North west
Gauteng	Gauteng Limpopo North west
Kwazulu-Natal	Gauteng Kwazulu-Natal Mpumalanga
Limpopo	Gauteng Limpopo Mpumalanga
Mpumalanga	Gauteng Mpumalanga Limpopo
Northern Cape	Northern Cape Gauteng Free State
North west	Gauteng North west Limpopo
Western Cape	Eastern Cape Western Cape Gauteng

Source: SAT Tourism Provincial data cuts 2018

4.7 Reasons for not traveling: 2018

Figure below provides reasons as to why fewer domestic trips were taken in 2018. As observed, 36.6% could not afford to travel, 22.4% had no reason to travel, 19.3% indicated that they were unemployed or had no income, 17.5% indicated time constraints and about 9% disliked traveling. According to the latest TSA results released by Stats SA (2018), preliminary figures for 2016 show that domestic tourism (R144 358 million) contributed 54% to total tourism expenditure (R265 758 million) which was more than inbound tourism (R121 400 million). An improvement in the performance of domestic tourism in South Africa could therefore lead to a possible increase in the contribution of tourism to the country's GDP and an increase in the number of jobs created by the sector. Locally-based service providers could therefore encourage cost-effective travelling packages for those who cannot afford to travel based on the prices of current packages available.

Figure 26: Percentage share of reasons for not taking a domestic trip: 2018



Source: SAT Tourism Provincial data cuts 2018

4.8 Integration of Domestic Tourism Surveys in the Country

There are two main sources for domestic tourism performance statistics, namely the SA Tourism Domestic Tourism Survey and the Stats SA Domestic Tourism Survey. The two separate surveys are conducted for different purposes and use different methodologies which can be seen in table 20 below. This caused considerable confusion amongst the users of domestic tourism statistics. To remedy this situation, it was agreed that the two surveys would be aligned and integrated into a single DTS that would serve both Stats SA, SA Tourism and other key stakeholders within the tourism sector. The harmonisation of the two surveys is still underway and it is envisaged that SA Tourism will then discontinue with the DTS going forward once the harmonisation process is completed. Table below indicates the difference between these two surveys. Most of the work done by the department with regards to domestic tourism uses results from SA Tourism hence the analysis above is based on SA Tourism data.

Table 20: Summary of primary differences between Stats SA and SA Tourism Domestic Tourism Surveys

Characteristic	SA Tourism	Stats SA
Type of Survey	Household	Household
Sample	15 594 persons/Adults (about 1300 per month)	28 000 households (continuous data collection and the 28 000 is divided into four quarters)
Respondents	Adults: 18 years and above, respond to individual trips only	All ages and respondents can respond for other household members of all the age groups.
Recall Period	One-month recall period. (Respondent is asked about the trips taken in the previous month)	Up to three-month recall period but data collected monthly.
Characteristics of trips	SA Tourism collect detailed information for each trip undertaken (day/night)	Stats SA only collect detailed information for the most recent trip taken in three months under review when data is collected.
Reporting	Annual Report Quarterly reports	Annual report Bi-annual report

CHAPTER FIVE: GOVERNMENT OWNED TOURISM RELATED ESTABLISHMENTS – CASE STUDY SANPARKS

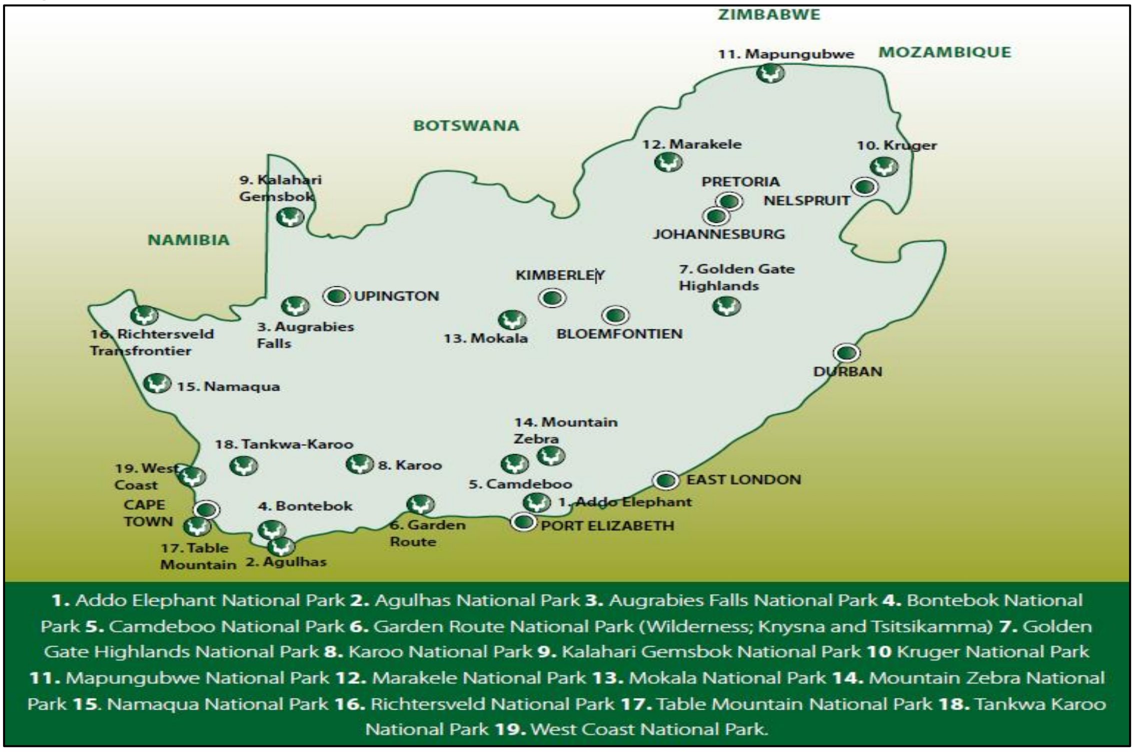
SANParks is a public entity under the jurisdiction of the Department of Environmental SANParks manages a system of 19 functional national parks in seven of the nine provinces of South Africa with a total area of just over 4 million hectares comprising 67% of the protected areas under state management. SANParks main objective is to protect wildlands, wildlife and biological life forms and promoting socio-economic development, eco-tourism and connecting citizens (SANParks, 2018) In addition, SANParks has also developed a Socio-Economic Development Strategy to assist with the development of communities neighbouring the parks. The strategy recognises that the parks should be used as a tool to promote local economic development in areas that the parks are located within. Two of the SANParks parks have been recognised as world heritage sites by the United Nations Educational, Scientific and Cultural Organization (UNESCO) these include the Mapungubwe Cultural landscape which is part of Mapungubwe National Park; and the Khomani Cultural Landscape which is part of the Kgalagadi Transfrontier Park (SanParks. 2018).

SANParks plays a key role in promoting and developing tourism in South Africa as the organisation targets both international and domestic tourism markets. Many tourists visit South Africa for purpose of visiting the wildlife which is located in most of the national parks that are managed by SANParks. SANParks has also recognised the role that tourism can play in improving the revenue generated in the parks. SANParks through public-private partnerships (PPPs), has enabled the organisation to expand its range of tourism products and to generate additional revenue to fund conservation and socio-economic development. There are currently 50 active PPPs involving the management of five-star accommodation in parks, retail outlets and restaurants. In 2017/18, these agreements generated income of R133 million, an increase of 14% from the previous year (SANParks, 2018).

5.1 Parks Managed by SANParks

The map below shows the location of the nineteen parks managed by SANParks that are located within South Africa.

Figure 27: Map of SA National Parks



Source: SANParks Annual report, 2017/18

5.2 SANParks Performance 2017/18

SANParks provide a variety of services such as accommodation, conference facilities, etc. The table below shows the revenue earned by SANParks through the different services offered by the entity. Revenue earned from conservation fees had the highest increase of 17.8% moving from R648 327 million in 2016/17 to R718 724 million in 2017/18. Total tourism revenue increased by 12.6% in 2017-18 moving from R1 424 billion in 2016/17 to R1 604 billion in 2017/18. Revenue from Accommodation (including camping) also increased from R648 327 million in 2016/17 to R718 724 million in 2017/18.

Table 21: Revenue Indicators for 2017/18

Revenue Indicators	2016/17	2017/18	% Growth
Tourism Revenue	R1 424 bn	R1 604 bn	12,6%
Revenue from Accommodation (including camping)	R648 327 ml	R718 724 ml	10,9%
Revenue from Conservation Fees	R491 764 ml	R579 114 ml	17,8%
Revenue from Activities	R90 964 ml	R100 986 ml	11,0%
Revenue from Concession Fees	R76 275 ml	R83 468 ml	9,4%
Revenue from Facilities Rental	R40 575 ml	R42 283 ml	4,2%

Revenue Indicators	2016/17	2017/18	% Growth
Revenue from Other Tourism Income	R35 851 ml	R40 601 ml	13,3%

Source: SANParks Annual report, 2017/18

SANParks has also reported that the organisation is an implementing agent of the Expanded Public Works Programme (EPWP) which was established by the government to create jobs. The table below shows that SANParks EPWP projects has created more than 7 000 Full time equivalent jobs through employing 16 900 beneficiaries on projects More than 730 SMMEs were supported through the programme. In addition, 70% of the participants were young people between the ages 16-35 and more than half were women (55%) and 2% were people with disabilities.

Table 22: Social Economic Indicators for 2017/18

Social economic indicators	2017/18
Full time equivalent jobs (FTE)	+7 000
No. of beneficiaries employed on projects (land rehabilitation and restorations)	16 900
No. of SMME supported through the programme	+730
Age group of participants (16-35 years)	70%
Gender of participants (women)	55%
Participants with disability	2%

Source: SANParks Annual report, 2017/18

Annexure A provides a list of all the parks managed by SANParks including a brief description of each of the parks, attractions offered, accommodation available, activities and the costs to visit the parks. More details on the performance of SANParks can be found in the 2017/18 SANParks Annual Report: https://www.sanparks.org/assets/docs/general/annual-report-2018.pdf

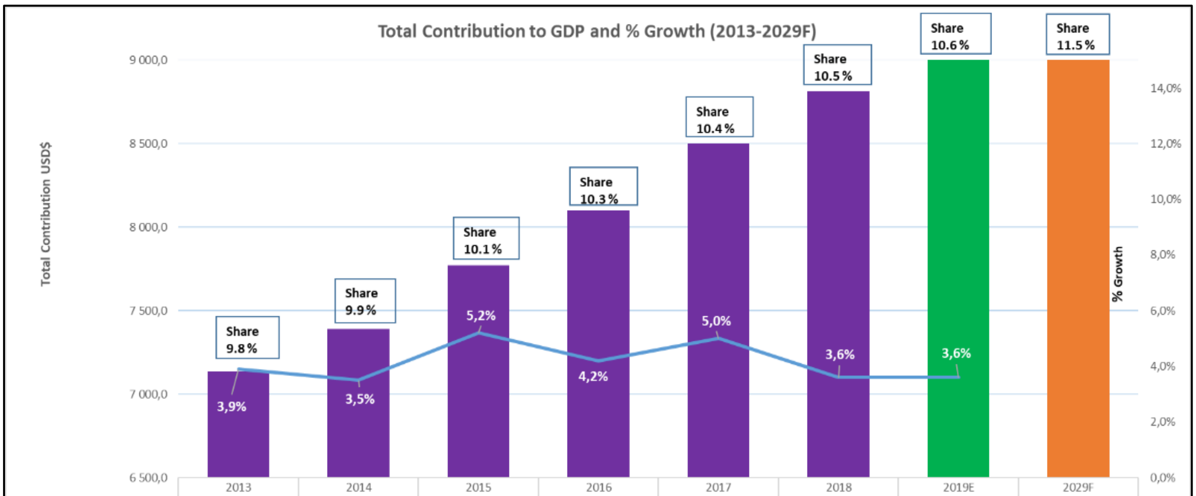
CHAPTER SIX: GOBAL TOURISM ECONOMIC IMPACT

The tourism sector has made a significant contribution to the world economy over the years by contributing towards economic development and job creation. Countries across the world have become dependent on the tourism sector for improving their economies including South Africa. This section of the report details the value of the tourism sector to the global economy by analysing key indicators which include the contribution of tourism to the global Gross Domestic Product (GDP) and global total employment for the period 2013-2018. The figures reported in this section are primarily sourced from the World Travel and Tourism Council (WTTC). Forecasted data from the WTTC for 2019 has also been included in the analysis.

6.1 Travel and Tourism's Total Contribution to Gross Domestic Product: 2013- 2019

According to the World Travel and Tourism Council (WTTC, 2019), the total contribution of the travel and tourism sector to the global economy was about US$8,502,2 billion in 2017 (10.4% of global GDP) and it went up to US$8, 811.0 billion in 2018 as indicated in figure one below. It is estimated that in 2019. It is estimated that the travel and tourism sector's total contribution to GDP will increase by 3.6% which will be US$9,126.7 billion (10.6% of total GDP) in 2019. Forecasted data for 2029 from WTTC indicates that travel and tourism's total contribution to GDP will be US$13 085,7 billion (11.5% of global GDP).

Figure 28: Travel and Tourism sector total contribution to GDP 2013-2019 and forecast for 2029



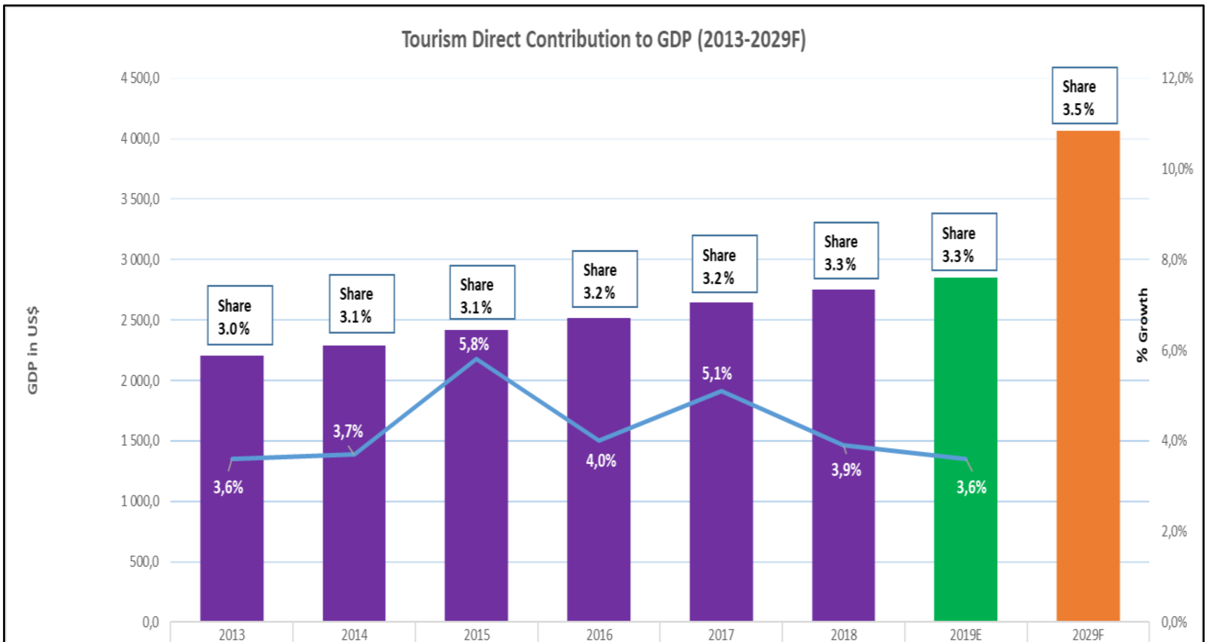
	2013	2014	2015	2016	2017	2018	2019E	2029F
US$ in bn (real prices)	7 136,6	7 389,9	7 772,4	8 100,3	8 502,2	8 811,0	9 126,7	13 085,7
Percentage growth	3,9%	3,5%	5,2%	4,2%	5,0%	3,6%	3,6%	

Note: Real prices Source: WTTC World Report 2019 and excel data sheet, downloaded June2019

6.2 Travel and Tourism's Direct Contribution to Gross Domestic Product: 2013-2019 and forecasted data for 2029

Figure below indicates the travel and tourism sector's direct contribution to GDP was about US$2,646.8 billion (3.2% of global GDP) in 2017 and increased to US$2,750.7 billion (3.9% of GDP) in 2018. The direct contribution of the Travel and Tourism sector is estimated to grow by 3.6% from 2018 to 2019 globally. In 2029, WTTC forecasts that the travel and tourism sector's direct contribution to GDP will be US$4 065,0 billion (3,5% of GDP). These results indicate that the travel and tourism sector will continue to play a significant role in the global economy. According to the WTTC, "the travel and tourism sector has become a critical engine of economic development for many countries and can also be used as a vehicle for sharing cultures and building mutual understandings" (WTTC, 2019).

Figure 29: Travel and Tourism Sector's Direct Contribution to GDP 2013-2019 and forecasts for 2029



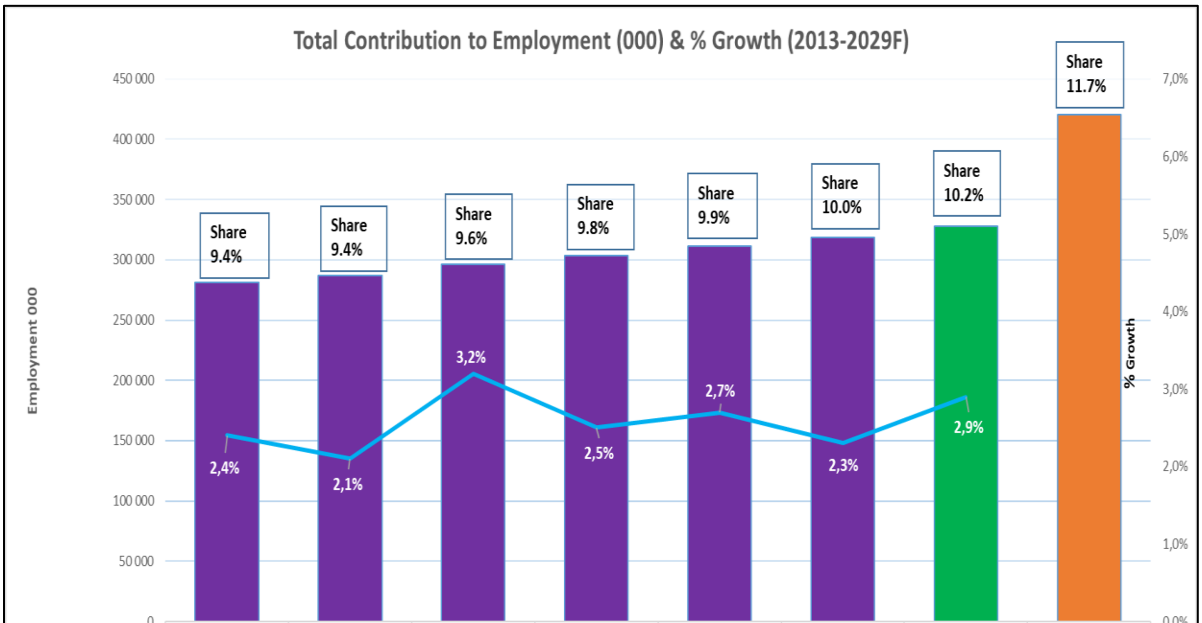
	2013	2014	2015	2016	2017	2018	2019E	2029F
USDbn, (real prices)	2 205,6	2 287,7	2 420,6	2 517,8	2 646,8	2 750,7	2 849,2	4 065,0
World Growth (%)	3,6%	3,7%	5,8%	4,0%	5,1%	3,9%	3,6%	

Note: Real prices Source: WTTC World Report 2019 and excel data sheet, downloaded June2019

6.3 Total Contribution of Travel & Tourism to employment: 2013-2019 and forecasts for 2019

According to the WTTC, the travel and tourism sector's growth in GDP has enabled job creation (WTTC, 2019). Figure below indicates that the total contribution of the travel and tourism sector to employment was about 313,703,000 jobs (9.9% of total employment) in 2017 globally and went up to 318,811,000 jobs in 2018 (10.0% of total employment). The Travels and Tourism sector's total contribution to employment is estimated to increase by 2.9% resulting in about 328,208,000 jobs in 2019 (10.2% of total employment). In 2029. The travel and tourism sector's total contribution to employment is expected to provide a total of 420,669,000 jobs which will contribute 11.7% towards total employment.

Figure 30: Travel and Tourism Sector total contribution to employment 2013-2019 and forecasts for 2029



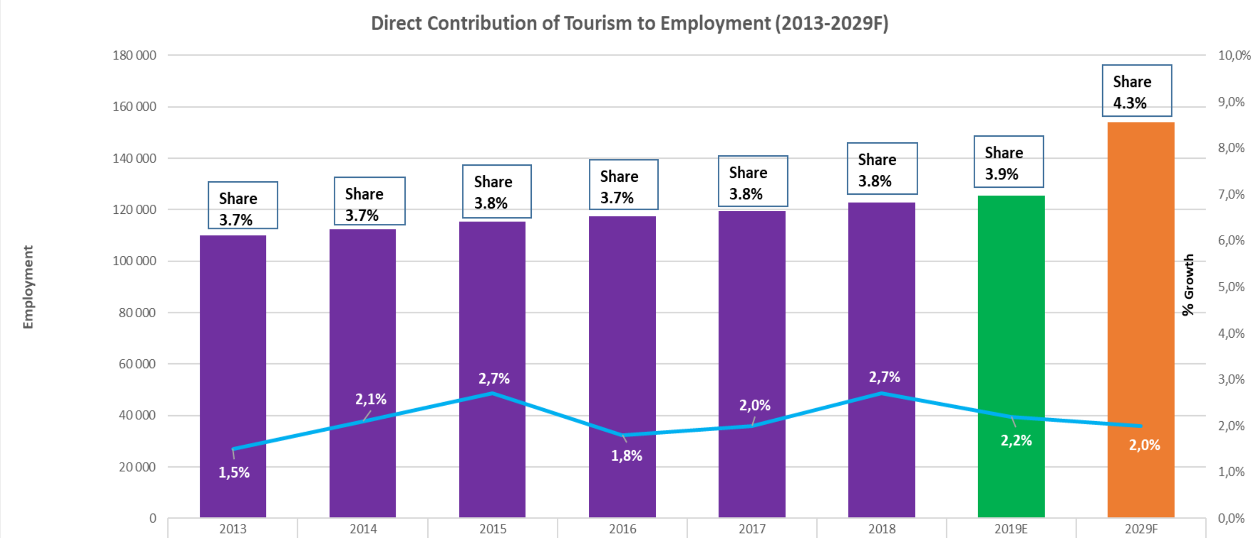
	2013	2014	2015	2016	2017	2018	2019E	2029F
Thousand of jobs	281 112	287 040	296 101	303 431	311 703	318 811	328 208	420 659
Percentage growth	2,4%	2,1%	3,2%	2,5%	2,7%	2,3%	2,9%	

Note: WTTC World Report 2019 and excel data sheet, downloaded June 2019

6.4 Travel and Tourism Direct Employment Contribution: 2013-2018

Figure below indicates that the Travel and Tourism sector directly generated about 119, 895, 000 jobs in 2017 contributing about 3.7% of total employment, and these jobs increased to 122,891,000 jobs (3.8% of total employment) in 2018. In 2029, WTTC forecasts that the travel and tourism sector will contribute 154,060, 000 jobs which will result in a 3.4% share of total employment. The WTTC has also reported that the travel and tourism sector often provides jobs to women, youth and other marginalised communities (WTTC, 2019).

Figure 31: Travel and Tourism Sector's Direct Contribution to Employment 2013-2019 and forecasts for 2029



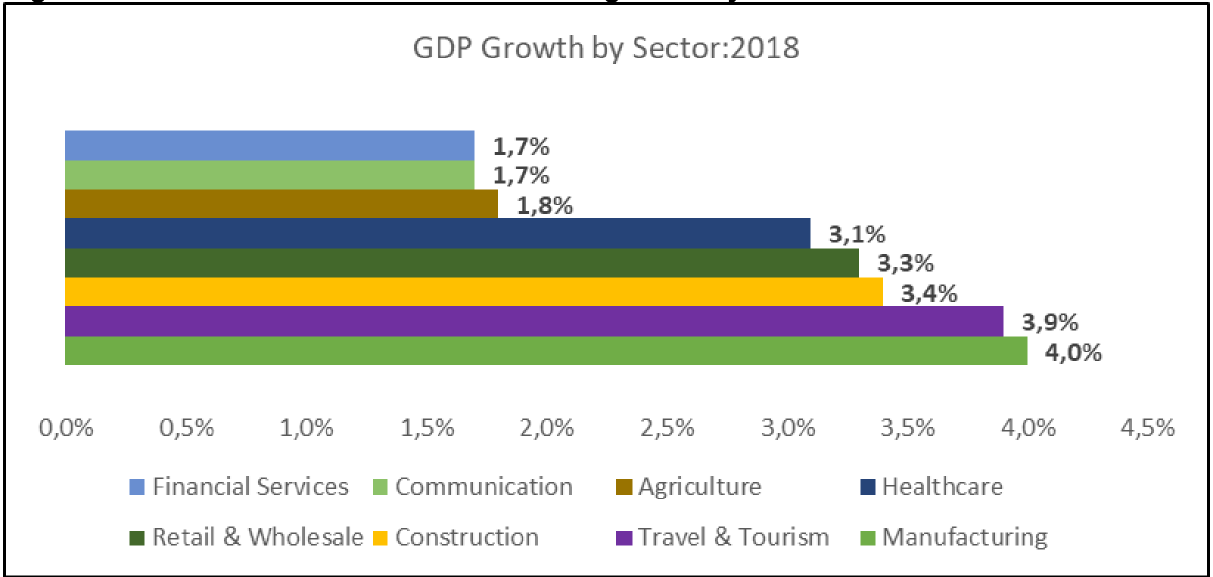
	2013	2014	2015	2016	2017	2018	2019E	2029F
Thousands of jobs	109 985	112 291	115 297	117 336	119 627	122 891	125 595	154 060
Percentage growth	1,5%	2,1%	2,7%	1,8%	2,0%	2,7%	2,2%	2,0%

Source: Note: Real prices Source: WTTC World Report 2019 and excel data sheet, downloaded June2019

6.5 Travel and Tourism performance compared to other sectors: GDP growth

The figure below indicates the global GDP growth of the different sectors for the period 2018. Data from the World Travel and Tourism Council indicates that the manufacturing sector led GDP growth with an increase of 4.0%. Travel and Tourism's growth was 3.9% which was higher than the construction sector (3.4%) and the retail and wholesale sector (3.3%).

Figure 32: Global Gross Domestic Product growth by Sector: 2018



Source: WTTC World Report 2019

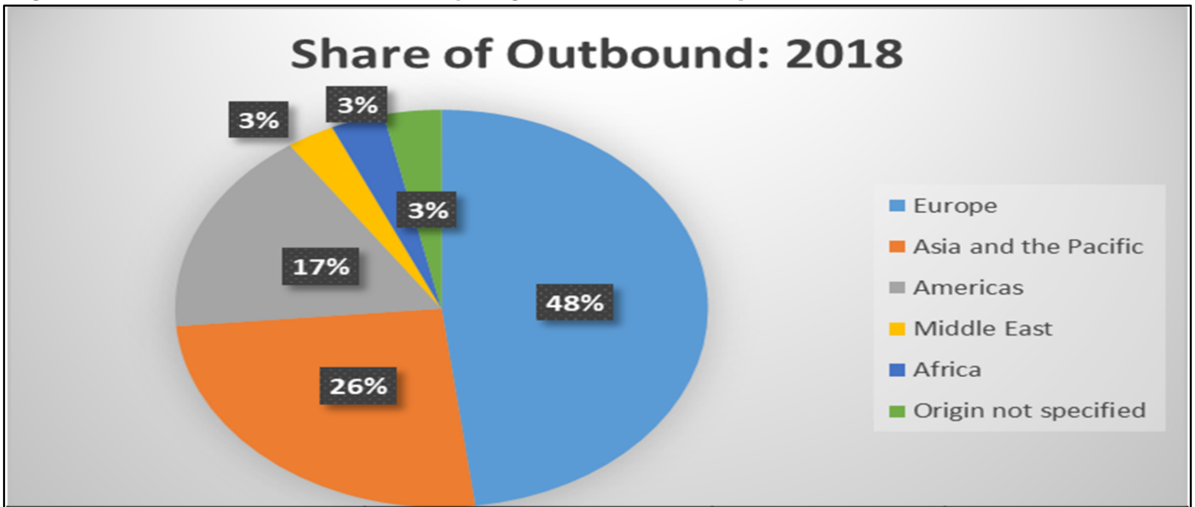
CHAPTER SEVEN: GLOBAL TOURISM PERFORMANCE

This section of the report describes the global performance of the tourism sector by analysing key indicators such as tourist arrivals tourism receipts, tourism expenditure and key tourism outbound markets. The data was mainly sourced from the United Nations World Tourism Organisation (UNWTO).

7.1 GLOBAL OUTBOUND: 2017-2018

This section analyses outbound travellers by region as report by UNWTO

Figure 33: Outbound travellers by regions: 2018 compared to 2017



Outbound	2018	2017	% Change
Europe	672,3	636,6	5,6%
Asia and the Pacific	358,7	337,6	6,2%
Americas	235	227,3	3,4%
Middle East	40,6	36,8	10,3%
Africa	45,5	42,5	7,1%
Origin not specified	49	47,7	2,7%
Total	**1 401**	**1 329**	**5,4%**

Source: UNWTO Tourism Highlights, 2019

The above figure indicates the total number of outbound tourists by regions for 2018 compared to 2017. Globally, there was a total of 1,401 million outbound tourists in 2018 which was an increase of 5.4% compared to 1,328 million in 2017. Europe (672.3 million) continued to be the world's largest source region of tourists globally, generating almost half of the world's international tourists in 2018 (48%). It was followed by Asia and the Pacific (358.7 million), which generated 26% of tourists and the Americas (235 million) which generated about 17% of total outbound tourists. Both regions, Middle East and Africa contributed a share of 3% to total outbound tourists during the same period under review. Although Europe continues to be the largest source region for tourist arrivals; European tourists often travel within their own region, which is known as intra-regional tourism. UNWTO research indicated Europe accounts for almost one in two trips in the world (UNWTO, 2019).

7.2 GLOBAL TOURIST'S ARRIVALS: 2015-2018

The following section compares the trends of global tourist arrivals for the period 2015 to 2018, as reported by the UNWTO. The figure below indicates that there was a total of 1.4 billion global tourist arrivals recorded in 2018, which was an increase of 5.4% (72 million) compared to 2017 (1.3 billion). According to UNWTO, this figure was reached two years ahead of UNWTO forecast (UNWTO, 2019). The highest growth of 7.1% was in 2017 were tourist arrivals increased from 1.2 billion in 2016 to 1.3 billion in 2017.

Figure 34: Global Tourist Arrivals: 2015-2018

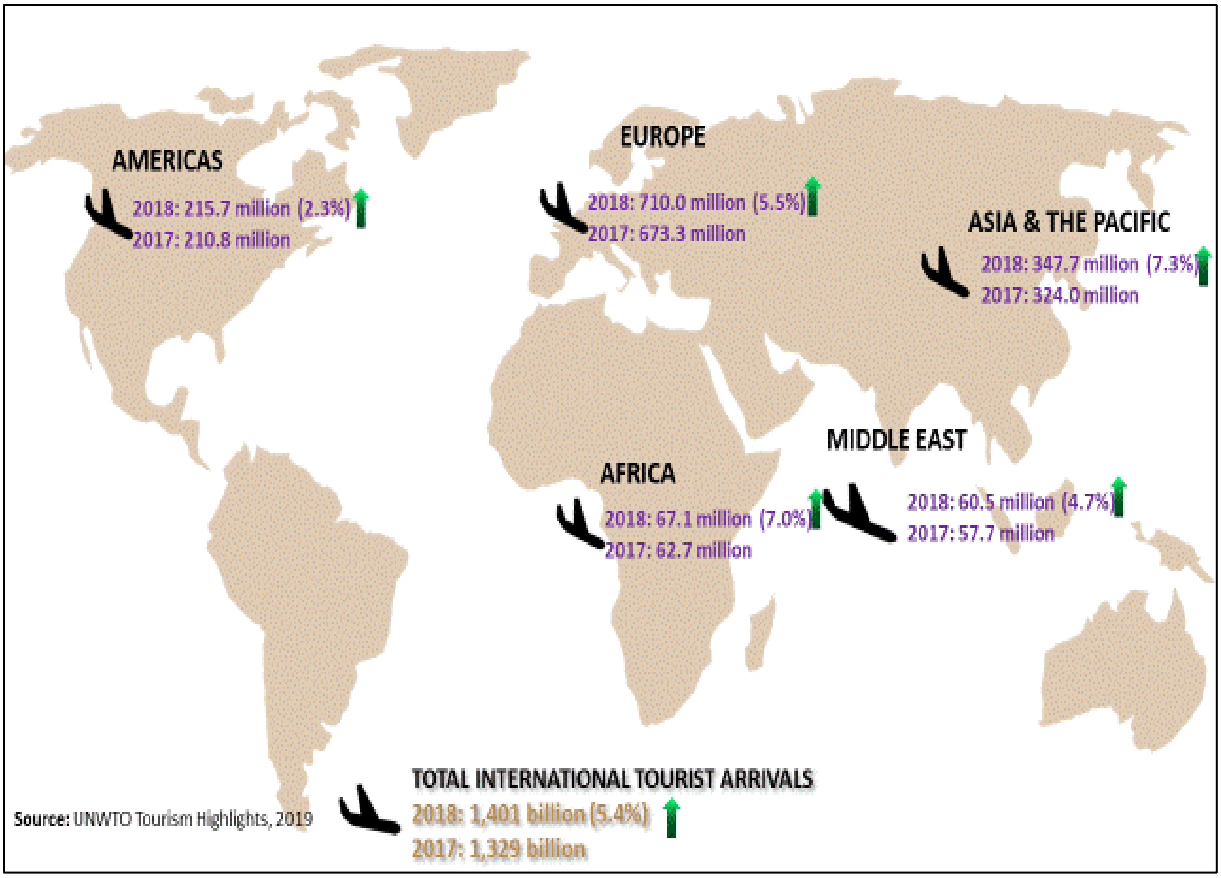
	2015	2016	2017	2018
Global Arrivals (millions)	1 196	1 241	1 329	1 401
Difference	62	45	88	72
% Growth	5,5%	3,8%	7,1%	5,4%

Source: UNWTO Highlights 2019 edition

7.3 Global Tourist Arrivals by Region: 2017-2018

Figure below indicates tourist arrivals by region for the period to 2017-2018. All regions had an increase in international arrivals. Asia and the Pacific had the highest growth (7.3%), followed by Africa (7.0%), Europe (5.5%%), Middle East (4.7%) and the Americas (2.3%). The statistics indicate that in 2018, tourist arrivals in Europe exceeded the 700 million mark with a share of 50.7% of the total global tourist arrivals (UNWTO, 2019). Preliminary data from UNWTO indicates that Africa's growth was mainly driven by countries in North African region such as Tunisia which had a double digit growth in tourist arrivals for 2018.

Figure 35: Global arrivals by region 2018 compared to 2017



Source: UNWTO Highlights 2019 edition

7.4 Top five destinations by regions: 2017

The figure below shows the top five destinations for international tourist by region for the period 2017 since the data for 2018 is incomplete from UNWTO.

Figure 36: Top global destinations by region: 2017

TOP FIVE DESTINATIONS FOR THE DIFFERENT REGIONS: 2017

WORLD	COUNTRY
1	France
2	Spain
3	USA
4	China
5	Italy

Europe	COUNTRY
1	France
2	Spain
3	Italy
4	Turkey
5	Germany

Asia and the Pacific	COUNTRY
1	China
2	Thailand
3	Japan
4	Hong Kong
5	Malaysia

AMERICAS	COUNTRY
1	United States
2	Mexico
3	Canada
4	Argentina
5	Brazil

AFRICA	COUNTRY
1	Morocco
2	South Africa
3	Tunisia
4	Zimbabwe
5	Cote d'Ivoire

MIDDLE EAST	COUNTRY
1	Saudi Arabi
2	UAE
3	Bahrain
4	Egypt
5	Jordan

Source: UNWTO Barometer, May 2019 edition

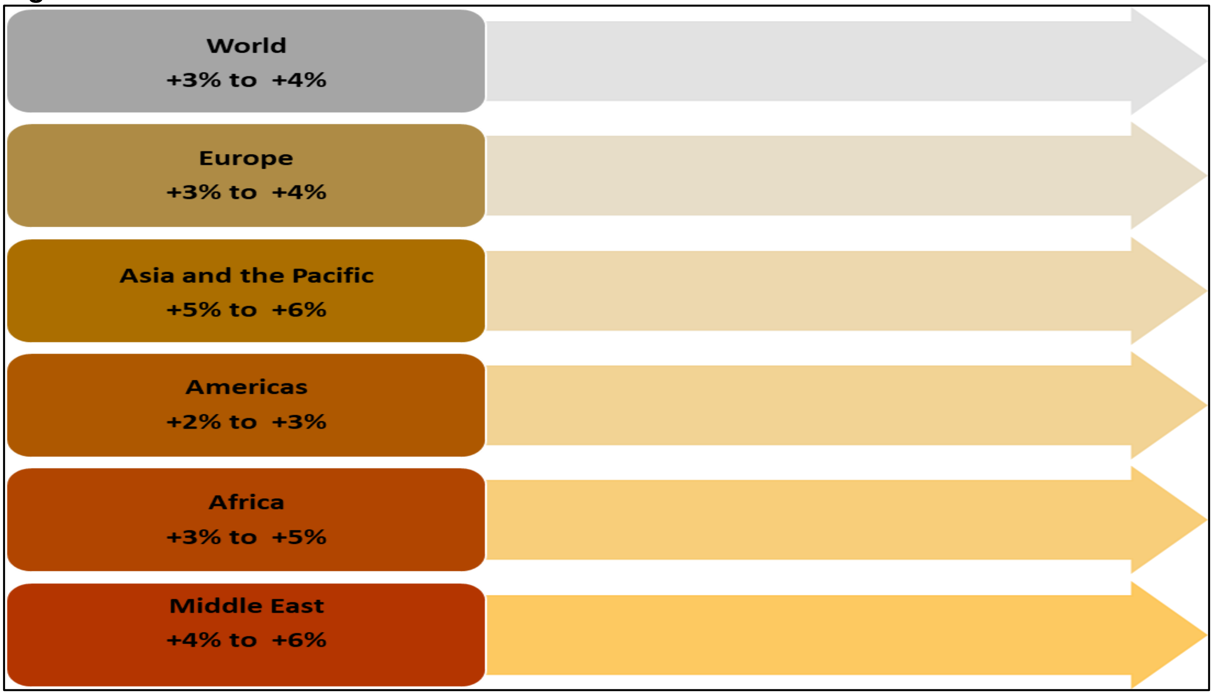
The top destinations in the world for 2017 was France followed by Spain and the USA. France was also the top destination to travel to in the Europe region in 2017. In the Asia and Pacific region, China was the top destination, followed by Thailand and Japan. In Africa, the top destination for global tourists was Morocco followed by South Africa. The top destination in the Middle East region was Saudi Arabia, followed by the UAE (United Arab Emirates). According to UNWTO (2019), destinations across the globe should be able to manage tourism in a sustainable manner for the benefit of all. Destinations need to remain competitive but at the same time be able to meet the Sustainable Development Goals (SDGs) that aim for a better future for all (UNWTO, 2019).

7.5 GLOBAL TOURIST ARRIVALS OUTLOOK: 2019

UNWTO projected figures for the performance of tourist arrivals in 2019 are provided in the figure below. Based on previous performance, UNWTO has estimated that the growth of tourist arrivals for the world will grow between 3% to 4%. Asia and the Pacific is expected to have the higest growth (5% to 6%) followed by the Middle East (4% to 6%). Growth for the

African regions is estimated to also grow between 3% to 5% while the Americas is expected to have a growth between 2% to 3%.

Figure 37: Global Tourist Arrivals Outlook-2019



Source: UNWTO Barometer May 2019 edition

7.6 Most expensive world currencies: 2018

The figure below shows the most expensive world currencies for the period 2018. The value of a currency could be an indication of the country's economy. The Kuwaiti Dinar which is the currency of Kuwait was ranked as the most expensive currency in the world. The British Pound was ranked as the fifth most expensive currency and the Euro was ranked as the eight most expensive currency in the world for the period 2018. The US Dollar was ranked as the tenth most expensive currency and is the currency of the United States. The US dollar is also considered the world's business currency, therefore, it has been considered the most powerful and popular currency (bookmyforex, 2019). The figure below shows the top tourism spenders by country for the period 2018. Countries which were also ranked as having the most expensive currencies in the world for 2018 are also in the list of top ten tourism spenders namely; USA (US dollar), Britian (Great British Pound (GBP)), France and Italy which uses the Euro (EUR).

Figure 38: World's most expensive currencies: 2018

Rank	Currency	Country
1	Kuwait Dinar (KWD)	Kuwait
2	Bahraini Dinar (BHD)	Bahrain
3	Omani Rial (OMR)	Oman
4	Jordan Dinar (JOD)	Jordan
5	Great British Pound (GBP)	Britain
6	Gibraltar Pound	Gibraltar
7	Caymanian Dollar	(KYD)
8	Euro (EUR)	European countries
9	Swiss Franc (CHF)	Switzerland
10	US Dollar	USA

Source: bookmyforex, 2019

7.7 International tourism expenditure by top ten countries and the period 2018 compared to 2017

Table below indicates the top ten (10) source markets by expenditure for the period 2017-2018.

Table 23: Top ten (10) source markets by expenditure for the period 2017-2018

Position 2018	Position 2017	Countries	USD$ billion 2017	USD$ billion 2018	Percent Change Real terms	Percent Change Actual
1	1	China	258	277	5%	7,4%
2	2	United States	135	144	7%	6,7%
3	3	Germany	90	94	1%	4,6%
4	4	United Kingdom	71	76	3%	7,5%
5	5	France	41	48	11%	15,9%
6	6	Australia	34	37	10%	7,6%
7	9	Russian Federation	31	35	11%	12,5%
8	7	Canada	32	33	4%	3,8%
9	8	Korea (ROK)	32	32	1%	0,9%
10	10	Italy	28	30	4%	8,3%
		Total Receipts	***1,346***	***1,451***	4.4%	7.8%

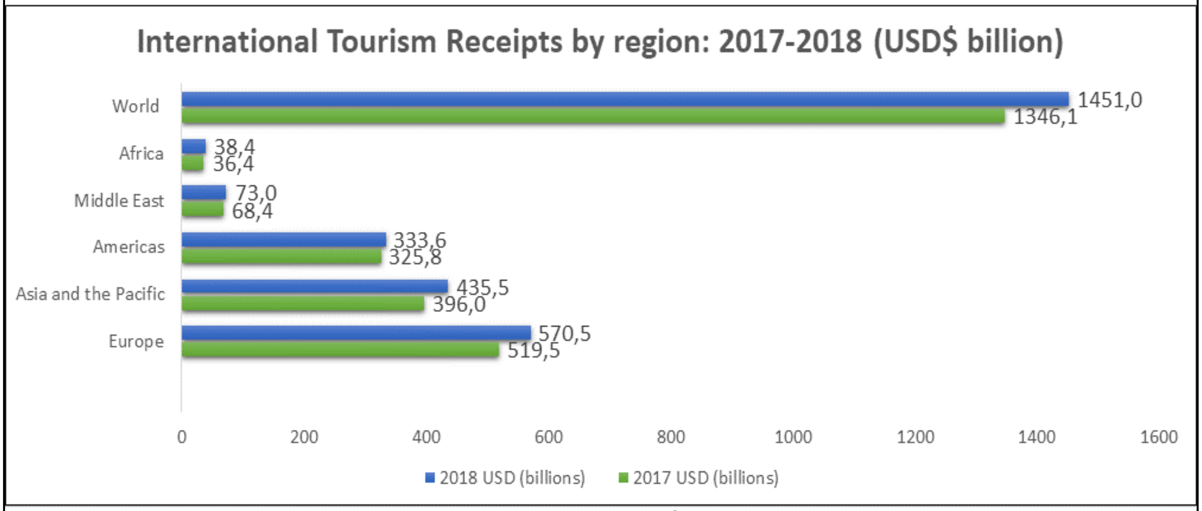
Note: Real terms are calculated in local currencies, at constant prices *Source: UNWTO Barometer May 2019 edition*

According to the UNWTO, China was the top spender globally in 2018 and 2017 with a total spend of US$277 billion in 2018 which was almost one fifth of the total tourism spending. In real terms, France and the Russian Federation had the highest growth of 11% for expenditure. The Russian Federation moved from 9th position in 2017 to the 7th position in 2018 with a total spend of US$35 and Canada dropped from 7th position in 2017 to 8th position in 2018. Korea also dropped from 8th position in 2017 to 9th position in 2018. The growth in international tourism expenditure reported by countries for the period 2018 reflect an increasing demand from major source markets, which is consistent with the 5.4% growth in international arrivals recorded for the same period under review (UNWTO, 2019).

7.8 International tourism receipts: 2017 to 2018

International tourism receipts are defined as the amount that a country earns from tourists visiting a region (UNWTO, 2018). Total international tourist receipts by region for 2018 compared to 2017 are indicated in the figure below.

Figure 39: International tourism receipts by region: 2018 compared to 2017



Region	% Change Real terms	% Change Actual numbers	2018 % Share
Europe	4,9%	9,8%	39,3%
Asia and the Pacific	7,4%	10,0%	30,0%
Americas	0,3%	2,4%	23,0%
Middle East	4,2%	6,7%	5,0%
Africa	1,6%	5,5%	2,6%
World	4,2%	7,8%	100,0%

Note: Real terms are calculated in local currencies, at constant prices *Source: UNWTO Tourism Highlights 2019 edition*

The total international tourism receipts generated in 2018 went up by 4.2% in real terms (local currencies) and this was an amount of about US$ 1 451 billion in 2018 compared to US$ 1 346 billion in 2017. Europe received US$570.5 billion receipts with an increase of 4.9% (in real terms) in 2018 compared to 2017, followed by Asia and the Pacific with (US$435.5 billion) with the highest increase of 7.4% (in real terms). the Americas had a slight increase of 0.3% (in real terms) which amounts to US$333.6 billion in 2018 compared to 2017. The Middle East received US$73.0 billion having an increase of about 4.2% (in real terms), Africa received US$38.4 billion with an increase of 1.6% (in real terms). The growth in tourism receipts has outpaced the world economy and most countries are benefiting from rising tourist income (UNWTO, 2019). According to UNWTO Secretary-General, Zurab Pololikashvili, "Revenues from international tourism translate into jobs, entrepreneurship and a better situation for people and local economies, while reducing trade deficits in many countries" (UNWTO, 2019).

7.9 Top 10 countries by international tourist receipts and international tourist arrivals: 2017-2018

Table 24: Top 10 countries by international tourist receipts and international tourist arrivals: 2017-2018

Rank		County	US$ (billion)		2018 – Inbound Arrivals (millions)
2018	2017		2017	2018	
1	1	United States	211	214	79,6
2	2	Spain	68	74	82,8
3	3	France	61	67	89,4
4	4	Thailand	57	63	38,3
5	5	United Kingdom	49	52	36,3
6	6	Italy	44	49	62,1
7	7	Australia	42	45	9,2
8	8	Germany	40	43	38,9
9	11	Japan	34	41	31,2
10	9	China	39	40	62,9

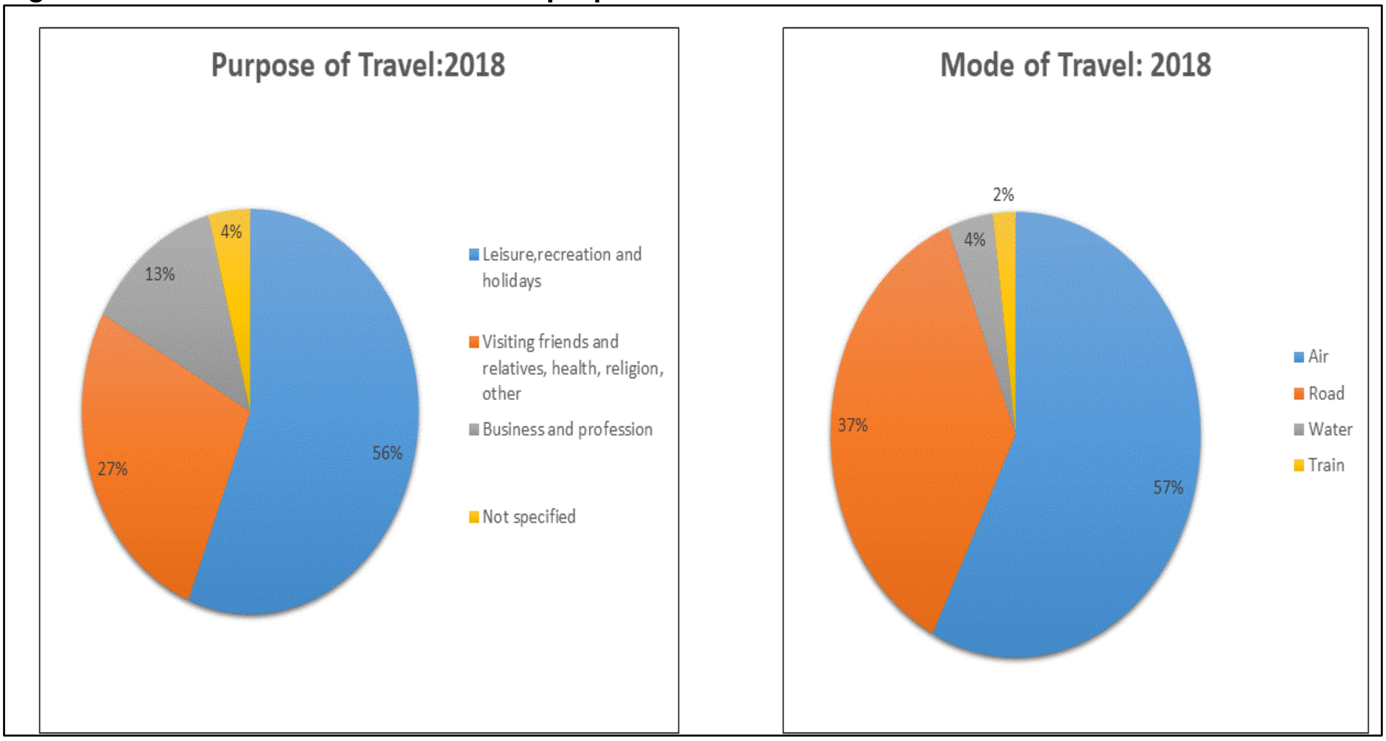
Source: UNWTO Tourism Highlights, 2019 edition

Table above indicates the top 10 earners for 2017 and 2018. In 2018, the four (4) best performing countries in relation to tourism receipts were the USA (US$214 billion), Spain (US$74 billion), France (US$67 billion) and Thailand (US$63 billion). Japan moved from the 11th position in 2017 to the 9th position in 2018 and China dropped from 9th position in 2017 to 10 position in 2018. Macao (China), which was in the 10th position in 2017 was replaced by Japan. UNWTO has also reported that the top ten tourism earners for 2018 account for almost 50% of total tourism receipts (UNWTO, 2019). The table also aims to indicate whether there is a relationship between tourist arrivals and tourism receipts. When comparing countries that were the highest earners for international tourism receipts to the top 10 inbound destinations, the results indicate that there might be no relationship between international receipts earned and inbound arrivals to a destination. In 2018, Thailand was ranked 4th and Italy 6th for total international tourists' receipts earned. However, Italy received more tourist arrivals than Thailand for the period. Similarly, China received more tourist arrivals in comparison to Thailand, Italy, Germany and Japan but is ranked lower than these countries in terms of the total international tourism receipts earned in 2018.

7.10 Purpose of visit and mode of transport: 2018

As seen in the figure below, the majority of international tourists travelled for leisure, recreation and holiday purposes (56%), followed by those who travelled to visit friends and relatives (VFR). Others travelled for health, religious and other reasons ((27%), and for business and professional reasons (13%). With regards to mode, most of international tourists travelled by air 57% followed by road (37%).

Figure 40: International tourist arrivals purpose and mode of travel: 2018



Source: UNWTO Tourism Highlights 2019 edition

CHAPTER EIGHT: GLOBAL TOURISM RELATED INDUSTRIES PERFORMANCE

This section provides an overview of the global tourism-related industries performance, focusing mainly on the global hotels, passengers and aircrafts movements and the meetings industry. Data for this section was sourced from the UNWTO Barometer March/April 2018, the International Airports Transport Association (IATA), International Congress and Convention Association (ICCA) and the Hotel News.

8.1 Global hotel industry performance: 2017-2018

The data for the performance of the hotel industry was sourced from Hotel News. The performance of the hotel industry globally by region for 2017 and 2018 is indicated in the table below.

Table: 25 Hotel performance indicators, 2018 compared to 2017

Region	Occupancy rate (%)			Average Daily Rate (ADR)			Revenue per available room (RevPAR) US$		
	2018	2017	% Change	2018 US$	2017 US$	% change 2018	2018 US$	2017 US$	% over 2018
Asia and the Pacific	70,6	70,4	0,2	86,3	85,4	1,0	60,9	60,2	1,2
Americas	65,8	65,5	0,5	105,2	102,3	2,9	69,3	67,0	3,4
Europe	72,4	71,5	1,2	112,5	108,3	3,9	81,4	77,4	5,2
Africa & Middle East	63,0	62,0	1,6	113,8	115,2	-1,3	71,7	71,4	0,3
Global Average	68,0	67,4	0,9	104,5	102,8	1,6	70,8	69,0	2,6

Source: Hotel News, 2019

Occupancy rate is one of the key indicators used to monitor the performance of a hotel, since the indicator measures the percentage of available rooms in a hotel that was sold during a specified period of time. The results in the table above indicate that the global hotel industry average occupancy rate was about 68.0% in 2018 which was a growth of 0.9% compared to the global hotel occupancy rate of 67.4% in 2017. Therefore, there were more available rooms sold globally in 2018 compared to 2017.

All regions recorded an increase in occupancy rate, with Africa and the Middle East having the highest increase (1.6%) followed by Europe (1.2%), then Americas with 0.5% and Asia and the Pacific 0.2% increases, respectively, during this period. Another key indicator used to measure hotel performance is the Average Daily Rate (ADR) which provides the average rate paid for rooms sold and is calculated by dividing room revenue by rooms sold. The global ADR in 2018 was US$104.5. Most regions recorded an increase in their ADR, except for Africa and the Middle East region which experienced a decrease of -1.3%.

Finally, the Revenue per available room (RevPar) is a measure that the hotel industry uses to determine the revenue generation capability of a hotel. The RevPar is calculated by dividing the total room revenue with the total number of available rooms in a hotel. RevPar differs from the ADR in that the RevPAR is affected by the share of unoccupied available rooms, while ADR shows only the average rate of rooms actually sold (UNWTO, 2019). The global RevPar for 2018 was US$70,8 which showed an increase of 2.6%. All regions also recorded as increase in RevPar during 2018.

8.2 Top five global hotel chains: 2018

The table below indicates the top five global hotel chains for 2018. Hilton was ranked number one with an income of US$6,3 billion followed by the Marriott with an income of US$5,5 billion. The Hyatt was ranked in third position with an income of US$3,5 billion. All of the five top hotels in 2018 were a US branded company.

Figure 41: Top Five Global Hotel Chains: 2018

Top Five Hotel Chains: 2018

POSITIONS	NAME	COUNTRY	INCOME IN US$ 000'
1	Hilton	US Brand	6,330
2	MARRIOTT	US Brand	5,464
3	HYATT	US Brand	3,512
4	Holiday Inn	US Brand	3,292
5	COURTYARD	US Brand	3,018

Source: https://brandirectory.com/rankings/hotels-50-2018

8.3 Global Meetings Industry: 2017-2018

The meetings and events industry also plays a key role in the performance of the tourism sector. Travellers that attend meetings/events/conferences that are hosted in other destinations are classified as business tourists. These business tourists often spend on food, drinks, shopping, entertainment, transport and accommodation in the destinations in which the meetings/events/conferences are hosted. The success of the tourism sector is therefore also dependent on the performance of the meetings and events industry.

The data for the performance of the meetings industry was sourced from the International Congress and Convention Association (ICCA).

Table 26: Number of meetings per region: 2016-2017

	2017	**2018**	**% Change**
Total Meetings	**12 558**	**12 937**	**3.0%**

Europe Ranking: Number of Meetings per Country							
Rank		**Country**	**2017**		**2018**		**2018 vs 2017 % change**
2018	**2017**		**Number**	**%share**	**Number**	**%share**	
		TOTAL EUROPE	6731		6798		
1	1	Germany	682	10,1%	642	9,4%	-5,9%
4	2	UK	592	8,8%	574	8,4%	-3,0%
2	3	Spain	564	8,4%	595	8,8%	5,5%
5	4	Italy	515	7,7%	522	7,7%	1,4%
3	5	France	506	7,5%	579	8,5%	14,4%
		OTHER	**3872**	57,5%	**4465**	**65,7%**	15,3%
Asia Pacific & Middle East Ranking: Number of Meetings per Country							
Rank		**Country**	**2017**		**2018**		**2018 vs 2017 % change**
2018	**2017**		**Number**	**%share**	**Number**	**%share**	
		TOTAL Asia Pacific & Middle East	2690		2940		
1	1	Japan	414	15,4%	492	16,7%	18,8%
2	2	China-PR	376	14,0%	449	15,3%	19,4%
3	3	Republic of Korea	279	10,4%	273	9,3%	-2,2%
4	4	Australia	258	9,6%	265	9,0%	2,7%
5	6	Thailand	163	6,1%	193	6,6%	18,4%
		OTHER	**1188**	**44,2**	**1268**	**43,1%**	6,7%
Latin & North America Ranking: Number of Meetings per Country							
Rank		Country	2017		2018		**2018 vs 2017 % change**
2018	2017		Number	%share	Number	%share	
		TOTAL Latin & North America	2659		2655		

1	1	USA	941	35,4%	947	35,7%	0,6%
2	2	Canada	360	13,5%	315	11,9%	-12,5%
3	3	Brazil	237	8,9%	233	8,8%	-1,7%
4	4	Argentina	199	7,5%	232	8,7%	16,6%
5	5	Mexico	198	7,4%	172	6,5%	-13,1%
		OTHER	**724**	27,2%	**756**	28,5%	4,4%

Africa Ranking: Number of Meetings per Country

Rank		**Country**	**2017**		**2018**		**2018 vs 2017 % change**
2018	**2017**		**Number**	**%share**	**Number**	**%share**	
		TOTAL AFRICA	359		414		
1	1	South Africa	122	34,0%	100	24,2%	-18%
2	2	Morocco	33	9,2%	45	10,9%	36%
3	4	Egypt	17	4,7%	31	7,5%	82%
3	4	Kenya	17	4,7%	31	7,5%	82%
5	3	Rwanda	21	5,8%	26	6,3%	24%
		OTHER	**149**	41,5%			

Source: 2018 & 2017 ICCA Statistics Report Country & City Rankings

ICCA recorded a total of 12,937 meetings in 2018 which was an increase of about 2.9%, this was an additional of 379 meetings compared to 2017 (12,558). The table above indicates the number of ICCA recorded meetings hosted per region worldwide, also showcasing the top five (5) countries where meetings are hosted in these regions. In 2018, Europe was the strongest competing region, hosting (6 798) meetings (52.5% share), followed by Asia and the Pacific, with a total of 2 940 meetings (22.7% share), Latin and North America with 2 655 meetings (20.5% share). During this period, Africa hosted 414 meetings (3.2% share), which was lower than the other regions.

Within Africa, South Africa is ranked as the number one country for hosting ICCA recorded meetings. In a recent document published by the OECD, hosting events and international meetings in a country has proven over the years to expand the host country's visitor economy, provide media exposure and promote regional development. The countries within the Africa region, including South Africa, should therefore consider hosting more events and international meetings in the region.

8.4 Air Transport: 2017-2018

Transportation has been identified as one of the key industries related to tourism since tourists require transportation to their destination. Air transportation has allowed tourists to travel to many destinations across the world. Over the years, statistics have often shown that when the aviation industry performs better the tourism sector also experiences an increase.

8.5 Top 20 international Mega-hubs: 2018

OAG, whom is a provider of digital flight information, intelligence and analytics for airports, airlines have developed a connectivity index which measures the ratio of scheduled seat capacity to the number of destinations served (OAG, 2019). Table below indicates the top 20 international mega-hub airports for 2018 with the highest connectivity index. The most internationally connected airport in the world in 2018 was London Heathrow (LHR) with a connectivity index of 333 followed by Chicago O'Hare (ORD) which was ranked in 2nd place, Frankfurt Airport (FRA) and Amsterdam Airport (AMS) were ranked as the 3rd and 4th most connected airports respectively for the period 2018. The largest Mega-hubs in Asia Pacific were all located in South East Asia namely Singapore Changi Airport (SIN), Jakarta Airport (CGK), Kuala Lumpur Airport (KUL), Hong Kong Airport (HKG) and Bangkok Airport (BKK).

Table 27 Top 20 International Mega-hubs: 2018

Rank	Airport	Country	Connectivity Index	Dominant carrier	Share of flight at Hub
1	LHR	United Kingdom	333	British Airways	52%
2	ORD	USA	306	United Airlines	48%
3	FRA	Germany	302	Lufthansa	63%
4	AMS	Netherlands	286	KLM	51%
5	YYZ	Canada	271	Air Canada	60%
6	LAX	USA	257	American Airlines	21%
7	ATL	USA	256	Delta Air Lines	79%
8	SIN	Singapore	253	Singapore Airlines	23%
9	CDG	France	250	Air France	51%
10	CGK	Indonesia	249	Garuda Indonesia	28%
11	MUC	Germany	237	Lufthansa	59%
12	KUL	Malaysia	233	AirAsia	40%
13	HKG	Hong Kong (SAR) China	230	Cathay Pacific Airways	26%
14	BKK	Thailand	230	Thai Airways International	21%
15	ICN	South Korea	216	Korean Air	23%
16	JFK	USA	207	Delta Air Lines	34%

Rank	Airport	Country	Connectivity Index	Dominant carrier	Share of flight at Hub
17	IST	Turkey	205	Turkish Airlines	80%
18	DXB	UAE	194	Emirates	45%
19	MIA	USA	192	American Airlines	75%
20	MEX	Mexico	181	Aeromexico	46%

Source: OAG Mega Hub International Index 2018

8.6 Air transport performance: 2018 compared to 2017

According to IATA data, the total market Revenue Passenger Kilometre (RPK), which is calculated by the total number of revenue passengers multiplied by the total distance travelled, indicates that there was a 6.5% increase in 2018 compared to 2017. The increase in RPK indicates that there was a higher growth in longer distance flights in 2018 compared to 2017. RPK also increased for international and domestic markets in 2018.

The total market results for the Available Seat Kilometres (ASK: number of seat carriers have available multiplied by the number of kilometres flown) indicated that there was a 6.1% growth in 2018 compared to 2017. An increased in ASK was also experienced in the international and domestic markets.

Passenger Load Factor (PLF) is an airline industry indicator that measures how much of an airline's passenger carrying capacity is used (UNWTO, 2018). The PLF for the total market increased slightly from 81.4% in 2017 to 81.9% in 2018. In 2018 the international market had a PLF of 81.2% and the domestic market had a PLF of 83.0% which indicates that there were slightly more seats filled with paying passengers on domestic flights compared to international flights in 2018.

Table 48: Air transport performance indicators 2018 compared to 2017

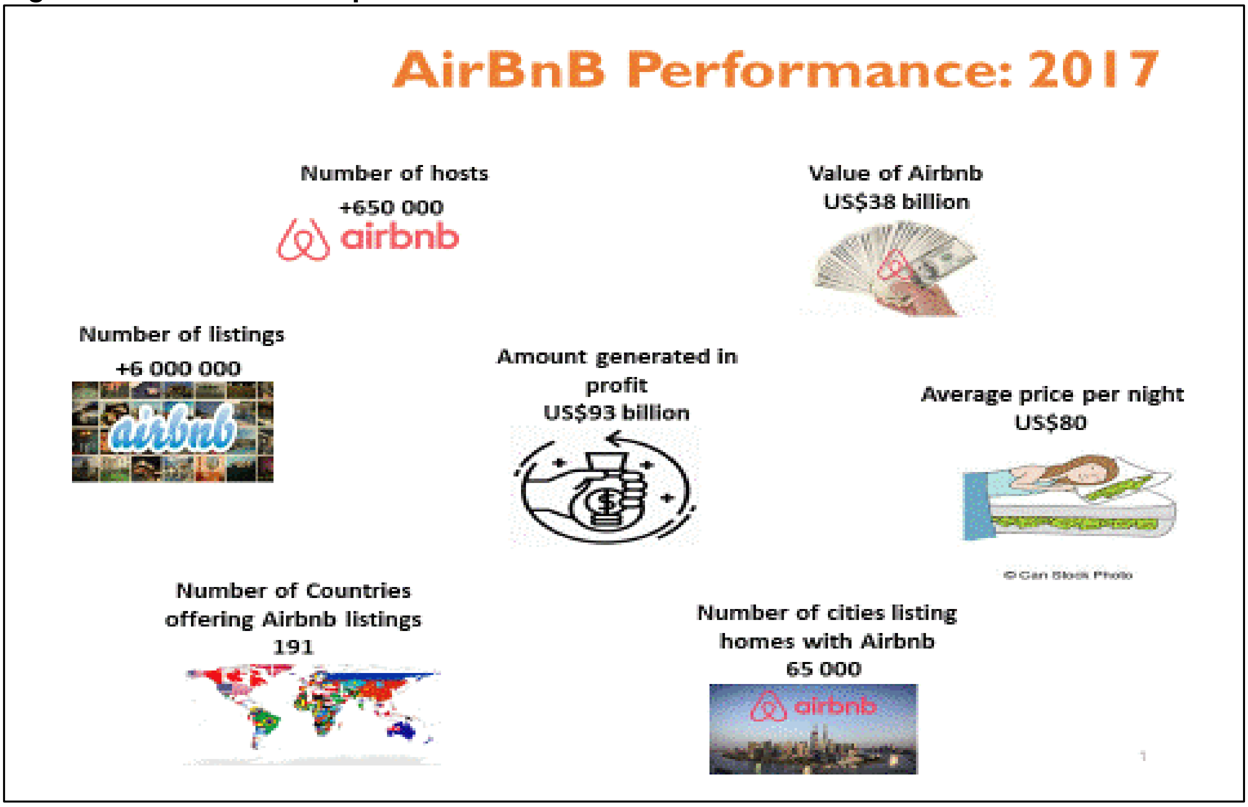
Total Market	RPK		ASK		PLF	
	Year on year % Change		Year on year % Change		Year on year% Change	
	2018 Compared to 2017	2017 Compared to 2016	2018 Compared to 2017	2017 Compared to 2016	2018 Compared to 2017	2017 Compared to 2016
International	6.3%	7.9%	5.7%	6.4%	81.2%	80.6%
Domestic	7.0%	7.0%	6.8%	6.2%	83.0%	83.0%
Total Market	**6.5%**	**7.6%**	**6.1%**	**6.3%**	**81.9%**	**81.4%**

Source: IATA, Air Passenger Market Analysis, 2018.RPK – Revenue Passenger Kilometres, ASK – Available Seats Kilometres, PLF – Passenger Load Factor

8.7 Airbnb Performance: 2017

The table below indicates the global performance of Airbnb in 2017. In 2017, there was a total of 191 countries and 65 000 cities that were offering Airbnb listings. There were an estimated 650 000 hosts globally and more than 6 million listings across the globe for the same period under review. For 2017, AirBnB reported a total amount of US$93 million that was generated in profit.

Figure 42: Global Airbnb performance: 2017

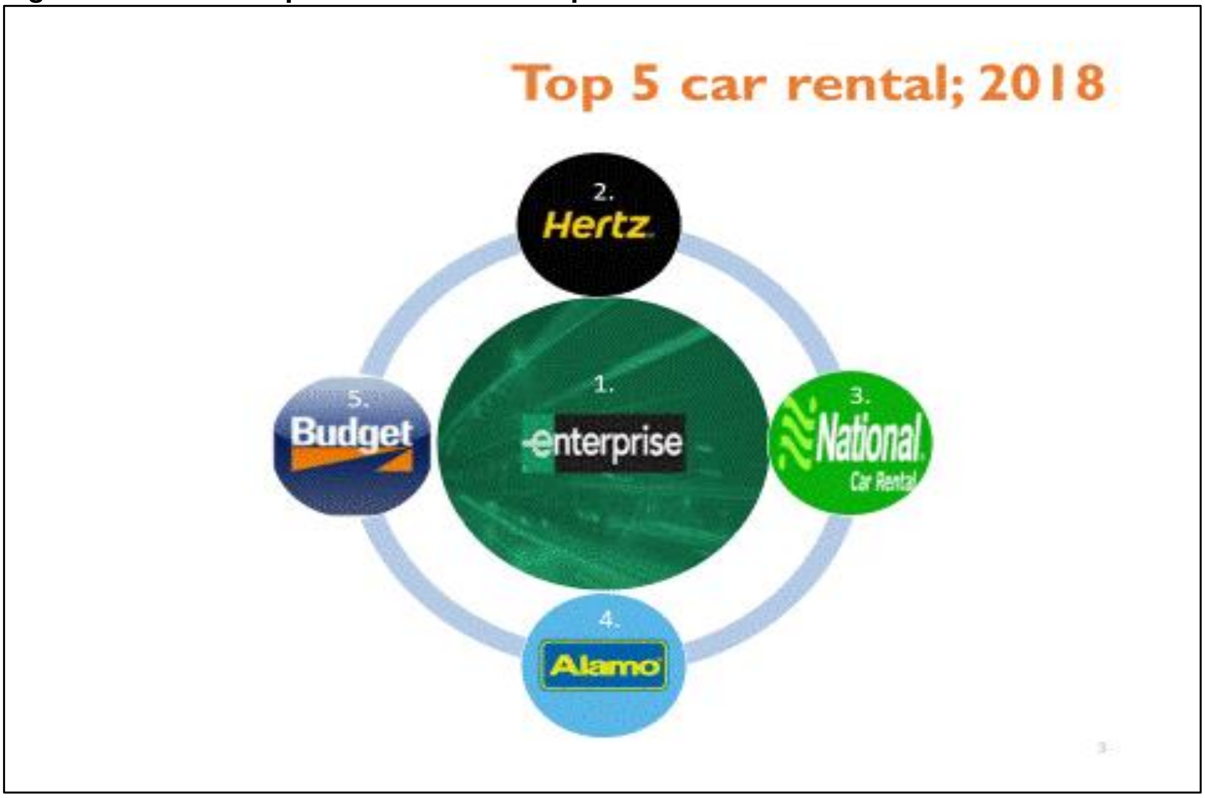


Source: Property Management Statistics, 2019

8.8 Car Rental Performance: 2018

The top five car rentals globally are presented in the table below. For 2018, Enterprise was ranked as number one followed by Hertz and National in second and third place respectively.

Figure 43: Global Top five car rental companies: 2018



Source: https://www.carbibles.com/best-car-rental-company/

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Annexure A: List of SANParks in South Africa

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
1.	Addo elephant national park.	Eastern Cape: Port Elizabeth .	The Park was proclaimed in 1931 to protect the last remaining Eastern Cape elephants. The Park was then only 2230 ha in size. Today it covers 180 000 ha and protects five diverse biomes. The park provides some of the best viewing in the country.	• The park is home to one of the densest African elephant populations on earth. • The unique flightless dung beetle. • The largest coastal dune field in the southern hemisphere. • The only Park in the world to be home to the Big 7, namely elephants, buffalo, rhino, lions, leopard. The great white shark and Southern right whale in the marine section complete the Big 7. • Over 400 birds species occur across the park.	Addo main rest camp. Narina bush camp. Matyholweni rest camp. Spekboom tented camp.	• Guided game drives. • Self-drives in the wildlife area. • Day trails and the Alexandria Hiking Trail. • Wheelchair friendly. PPC Discovery Trail. • Guided horseback trails • Birding. • 4x4 trail for owners of off-road vehicles.	South African Citizens and Residents (with ID): Adult Rate / Day=R68 Child rate=R34. SADC Nationals (with passport) Adult Rate / Day=R136 Child rate=R68. Standard Conservation Fee: Adult Rate / Day=R272 Child rate=R136. ***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
2	Agulhas national park.	Western Cape.	Agulhas National Park at the southernmost tip of Arica, official meeting place of the Atlantic and Indian oceans, is a place of rugged beauty with rich cultural and natural heritage. Many national monuments are found in the area, such as the historic Cape Agulhas Lighthouse, which has been in operation since 1849.	The Southernmost Tip of Africa – Where the Atlantic and Indian Oceans meet! • The Cape Agulhas Lighthouse – Designed on the model of the Pharaohs of ancient Egypt, this is the oldest working lighthouse erected on the African Continent's coastline • Soetendalsvlei – It is second largest lacustrine wetlands system and the largest freshwater lake in Southern Africa with access to the sea. • Graveyard of ships – The	Agulhas rest camp Lagoon house Rhenosterkop guest cottages Bergplaas guest house	• Visit the southernmost tip of Africa, the official position being S34°K49'58" E20°00'12". • Visit the unique Lighthouse Museum, the only one on the African continent. View the ship wreck and fish traps. See the remains of the tuna trawler, the Meisho Maru 38, and visit the Shipwreck Museum in Bredasdorp. Enquire about the fish traps at Rasperpunt. • Explore the fynbos on the Agulhas Plain with its great diversity of indigenous flora and unique vegetation such as limestone fynbos • Swimming and angling. Fishing permits can be purchased from the Struisbaai Post Office at the Struisbaai Mall.	South African Citizens and Residents (with ID): Adult Rate / Day=R40 Child rate=R20 SADC Nationals (with passport) Adult Rate / Day=R80 Child rate=R40 Standard Conservation Fee: Adult Rate / Day=R160 Child rate=R80 ***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
				Zoetendal, the Gentoo and the Doncaster are some of the many shipwrecks found along the Agulhas coastline. Artefacts from these shipwrecks are on display at the Bredasdorp Shipwreck Museum.		• Go bird watching; the Park has exceptional birdlife, including endangered avifauna such as the African Black Oystercatcher and the vulnerable Stanley's Bustard. • Bird lovers will also enjoy congregate in large flocks on wetlands and in salpans. • Follow trails to experience the beautiful view, interesting birds, and our unique floral heritage. • Enquire about the Rasperpunt hiking trail just to the west of Cape Agulhas.	
3	|Ai-|ais/ Richtersveld National Park.	Northern Cape.	An international treaty, signed on 1 August 2003, incorporated the |Ai|Ais Hot Springs Game Park in Namibia	• Rock Hyrax • Ground Squirrel • Jackal Buzzard • 'Half-mens' plants (Half Human)	Sendelingsdrift rest camp Tatasberg wilderness camp Gannakouriep wilderness camp Campsites	• Bird watching • Guided Trails • Fly fishing (catch and release) • Camping	South African Citizens and Residents (with ID): Adult Rate / Day=R70 Child rate=R35

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			and |Ai-|Ais/Richtersveld National Park in South Africa, resulting in the establishment of the |Ai |Ais/Richtersveld Trans frontier Park. This is the largest mountain desert park of South Africa, and natures 30% of all South Africa's succulent plant species. One of the main features of the combined park is the world's second largest canyon - the Fish River Canyon. At Sendelingsdrift, on the South African side, a pontoon has been established to ferry people and vehicles across the Orange River.	• Hartmann's Mountain Zebra	Hiking trails bush camp		SADC Nationals (with passport) Adult Rate / Day=R140 Child rate=R70 Standard Conservation Fee: Adult Rate / Day=R230 Child rate=R115 ***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			Sendelingsdrift is a border post and entry to Namibian side of the park (weather permitted phone park).				
4	Augrabies falls national park	Northern Cape	The park was initially proclaimed to conserve a small area of geological interest around the Augrabies Falls. It is the world's 6th largest waterfall, measuring 56m in height, and its downstream gorge, which stretches over 20km, offers breathtaking views. The Khoi people called it 'Aukoerebis', or place of Great Noise, as this powerful flow of water is unleashed from	• Moon Rock - Augrabies Falls' prominent landmark, which is a giant exfoliation dome or "whaleback". Hiking to the peak, the visitor will see one of the best views of the park surroundings. • Oranjekom & Ararat -Essential viewpoints to observe the massive gorge areas as well as the wildlife. Principle fauna to spot include the nesting Verreaux's (Black) Eagles, which prey on the	Main rest camp Camp site	• Klip spinger hiking trail (3day, closed 15 October to 31 March). • Garib 3 in 1 adventure – canoeing in the gorge, hiking out of it and a mountain bike trip back to the camp. • Bird Watching. • Game viewing in own vehicle • Dassie Nature Trails • Night drives	South African Citizens and Residents (with ID): Adult Rate / Day=R48 Child rate=R24 SADC Nationals (with passport) Adult Rate / Day=R96 Child rate=R48 Standard Conservation Fee: Adult Rate / Day=R192 Child rate=R96 ***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			rocky surroundings characterized by the 18 abyss of the Orange River Gorge. The 57 000 ha park lies mainly south of the Orange River A new boardwalk offers the visitor a safe view of the falls; different platforms give fascinating views on the falls magnificent gorge (wheel chair friendly).	abundant rock hyrax populations, and the Cape clawless otter.			
5	Bontebok national park	Western Cape	Bontebok National Park, just outside the historic town of Swellendam, lies at the foot of the majestic	• Picnics and braai facilities on the banks of the Breede River. • Dedicated mountain biking trails.	Lang elsie's kraal rest camp.	• Game viewing from your own vehicle along a circular route (dirt roads) which includes three viewpoints with	South African Citizens and Residents (with ID): Adult Rate / Day=R40 Child rate=R20

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			Langeberg Mountains and is bordered by the winding Breede River. The Park is home to over 200 Bontebok and many other animals including the Red Hartebees and Grey Rhebok. Although the smallest of SA's 22 National Parks, it is by no means less diverse.	• Hiking – there are 3 short trails which start near the rest camp. • Die Stroom Function and Braai Facility on the banks of the Breede; equipped to cater for up to 50 people. • Denham's Bustard. • Cheese tasting in Swellendam. • The wine routes and historic buildings of Swellendam, Robertson, Montagu, Aston and Bonnievale. • Sulina, the magical Fairy Garden in Swellendam. • The hot springs in Montague.	L bontebok riverside campang elsie's kraal rest camp	wonderful views of the Breede. • Birding • Nature-hiking trails • Angling (licence available from reception) • Canoeing / kayaking (own equipment) • Mountain biking	SADC Nationals (with passport) Adult Rate / Day=R56 Child rate=R28 Standard Conservation Fee: Adult Rate / Day=R112 Child rate=R56 ***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
6	Camdeboo national park	Eastern Cape	Camdeboo National Park was proclaimed as South Africa's 22nd National Park under the management of South African National Parks on the 30th of October 2005, following an extensive process of negotiation and discussion between government, conservation groups, and concerned stakeholders. Elevation to national park status was made possible by the World Wide Fund for Nature in South Africa (WWF-SA), which donated the 14500 hectare Karoo Nature	• The Valley of Desolation, sometimes referred to as the "Cathedral of the Mountains", provides visitors with an experience ranging from spiritual contact to one of profound awareness of the surroundings majestic beauty. • Magnificent dolerite pillars rise up to heights of 90 -120 meters, providing visitors with awesome panoramic views and an unforgettable experience. • The Game Viewing Area is home to buffalo and a variety of antelope species such as gemsbok	Lakeview tented camp La nqweba campsitekeview tented camp	• Hiking Trails • Fishing and Water Sports (permits Required) • Game viewing • 4x4 Trail, 4x4's needed • Picnic sites • Bird watching • Self-drive Game Viewing • Booking is essential	South African Citizens and Residents (with ID): Adult Rate / Day=R38 Child rate=R19 SADC Nationals (with passport) Adult Rate / Day=R76 Child rate=R38 Standard Conservation Fee: Adult Rate / Day=R112 Child rate=R56 ***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			Reserve to be the centrepiece of the project. The park now covers over 19 000 hectares.	and wildebeest. Birdlife flourishes around the Nqweba Dam and water sports such as fishing are permitted here. • The Camdeboo Education Centre provides facilities for school groups on overnight educational programmes and can also be used for team – building.			
7	Garden route national park - wilderness	Eastern Cape	The park was proclaimed in 1983, with more additions made after that, adding in, among others, state islands in the Wilderness National Lake Area, Rondevlei and lands between Rondevlei and lands between	• Pansy Shell • Pied Kingfisher • Grey Heron • Little Egret	Ebb and flow rest camp – north and south	• Bathing, canoeing fi shing at wilderness Beach, Touw River and some of the lakes • Hiking – The park boat of six trails ranging from fairy easy to difficult • Boating at Island Lake • Mountain Biking • Abseiling • Birding	South African Citizens and Residents (with ID): Adult Rate / Day=R38 Child rate=R19 SADC Nationals (with passport) Adult Rate / Day=R64 Child rate=R 22 Standard Conservation Fee:

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			Rondevlei and Swartvlei Lake.				Adult Rate / Day=R128 Child rate=R64 ***For accommodation rates: please go to link:*** [Accommodation Pricing]()
8	Garden route national park - knysna	Western Cape	Knysna National Lake Area was proclaimed in December 1985 in order to protect the Knysna lagoon and salt marshes and activities on the Knysna lagoon. The Knysna estuary is the second largest rich estuary in South Africa. The Knysna River has its origin in the Outeniqua Mountains. The estuary where the Knysna River meets the Indian Ocean is	• The Knysna Forest Camping Decks: These timber decks give the visitor an opportunity to feel at one with nature. Situated in the Diepwalle Forest area, sleep over and enjoy some of the best day walks, mountains biking, picnic and enjoy scenic viewpoints. • Garden of Eden in Harkerville Forest offers the visitor the tree species of the moister forest	Diepwalle camping decks Tree top forest chalet	• Outeniqua Hiking Trail Forest walks • Fishing • Water skiing • Mountain biking • Birding • Sailing • Angling • Boardsailing • Power boating	South African Citizens and Residents (with ID): Adult Rate / Day=R32 Child rate=R16 SADC Nationals (with passport) Adult Rate / Day=R64 Child rate=R32 Standard Conservation Fee: Adult Rate / Day=R128 Child rate=R64 ***For accommodation rates: please go to link:***

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			permanently open. The estuary is 19 km long and gradually widens and deepens to form a lagoon approximately 3 km wide 5m deep.	types. Picnic and enjoy the short circular walk and an 800-meter trail for those in wheelchairs is route –marked. • Kranshoek Viewpoint and Picnic Sites, the best lookout point in the Southern Cape Coast, it offers the visitors cliff-top of the coast and a warm sheltered picnic site.			Accommodation Pricing
9	Garden route national park - tsitsikamma	Western Cape	Tsitsikamma National Park protects a wonderland of inter-tidal and marine life. This is one of the largest single unit' no take' (including fishing) Marine Protected Area (MPA) in the world, conserving 11% of South	• Dolphins and porpoises • African Black Oystercatcher • Knysna Lourie • Cape Clawless Otter • Blue Duiker	Storms river mouth rest camp Storms river mouth - backpackers Natures' valley rest camp	• The Otter Trail • The Dolphin Trail • Soft Nature Trails • Tree Top Canopy Tours • Abseiling • 4x4 Trails • Boat Rides • Snorkelling • Bungee Jumping – the world' highest • Scuba Diving • Sea Kayaking	South African Citizens and Residents (with ID): Adult Rate / Day=R54 Child rate=R27 SADC Nationals (with passport) Adult Rate / Day=R108 Child rate=R54 Standard Conservation Fee:

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			Africa's Temperate South Coast rocky shoreline and provides a 'laboratory' for fisheries baseline research on endangered line fish species. It was proclaimed in 1964 as the Marine National Park in Africa.			• Swimming Pool for overnight visitors in Storms River Mouth	Adult Rate / Day=R216 Child rate=R108 ***For accommodation rates: please go to link:*** Accommodation Pricing
10	Golden gate highlands national park.	Free State	An initial core area of 1792 ha, which included the farms Glen Reenen, Wodehouse and Melsetter, was proclaimed in 1962 as the Golden Gate Highlands National Park on 13 September 1963. That same year the Glen Reenen rest camp was developed by	• The van Reenen family graveyard. • Vulture Restaurant. • Cathedral Cave (Guided Walk). • Spectacular lookout points and viewpoints such as Zuluhoek lookout point. • Generaalskop viewpoint, the third highest point in the park; Oribi basin and Drekensberg view.	Glen reenen rest camp Golden gate hotel and chalets Highlands mountain retreat Basotho cultural village Noord brabant farmhouse Wilgenhof environmental education centre	• Rhebok Hiking Trail • Short nature trails • Guided Horse Trails • Canoeing • Swimming pool • Abseiling • Holiday programmes are conducted during the April and December holidays • Tennis • Cultural tour at Basotho Cultural Village	South African Citizens and Residents (with ID): Adult Rate / Day=R48 Child rate=R24 SADC Nationals (with passport) Adult Rate / Day=R96 Child rate=R48 Standard Conservation Fee: Adult Rate / Day=R192 Child rate=R96

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			utilising an old farm building as tourist accommodation.				***For accommodation rates: please go to link:*** [Accommodation Pricing]
11	Karoo national park	Western Cape	In the 1970s South African National Parks proposed the establishment of a National Park that would be representative of the Nama Karoo Biome. After considering a number of possible suitable areas it was decided to establish this new park in the vicinity of Beaufort West. In a gesture of support, the Town	• The Karoo National Park has welcomed the arrival of lions in 2010 for the first time after an absence of 170 years. These lions became the first wild, free ranging lions in the Great Karoo. • Verraux's (Black) Eagle breeding pairs occur in the Park. • The dramatic landscapes and utter tranquillity of the Karoo.	Camping site Camping site Camping site	• Guided game drives. • Self-drive game viewing. • Guided walks. • Fossil Trail (wheelchair friendly). • Two 4x4 trails, with an overnight option in Embizweni Cottage. • Interpretive Center.	South African Citizens and Residents (with ID): Adult Rate / Day=R48 Child rate=R24 SADC Nationals (with passport) Adult Rate / Day=R96 Child rate=R48 Standard Conservation Fee: Adult Rate / Day=R192 Child rate=R96 ***For accommodation rates: please go***

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			Council of Beaufort West donated 7209 ha of communal and north- west of the town to the South African National Park, proclaimed in 1979. The Park now covers approximately 90 000 hectares.	• Tortoises – the park hosts 5 different species, the highest density of species per equivalent area anywhere in the world. • Cape Mountain Zebra – this species came close to extinction early in the 20th Century. It is now well established with the largest herd in SA resident in the Park. Burchell's Zebra also occurs in the Park • Springbok are protected in the Park and are a reminder of the once massive herds that crossed the Karoo on annual migration that could stretch for			***to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
				several kilometres. • The Klipspringer Mountain Pass not only provides a visitor with spectacular views and is a testament to civil engineering toil and precision.			
12	Kgalagadi transfrontier park		On 7 April 1999 a treaty was signed that would link the Gemsbok National Park and the Kalahari Gemsbok National Park under one unifying name– The Kgalagadi Transfrontier Park. It was officially opened on 12 May 2000 as the first formally declared transfrontier park in Africa. The Kalahari Gemsbok National Park was	• Gemsbok – these large striking desert antelopes are the emblem of the park. • Suricate (Meerkat) – these hyperactive little omnivores have wonderfully intricate structures. • Black-maned Kalahari Lions – Physically impressive, they are the kings of the Kalahari Desert.	**TRADITIONAL CAMPS x 3** TWEE RIVIEREN Mata mata Nossob **WILDERNESS CAMPS:** Kalahari tented camp Kieliekrankie Urikaruus Bitterpan Gharagab Grootkolk !Xaus lodge On Botswana side of the park	• Lectures, slide shows and holidays programmes are organised from the information centre at Twee Rivieren (inquire at reception) • Game drives at Nasob and Twee Rivieren • 4x4 Trails (self-guided Botswana from South Africa tel: 09 2673180774 • Guided 3 –nights 4x4 Eco-Trail (Nossob trail, book at reception)! Xerry Wilderness Hiking Trail depart from Nossob book at reception. It is self-	South African Citizens and Residents (with ID): Adult Rate / Day=R82 Child rate=R41 SADC Nationals (with passport) Adult Rate / Day=R164 Child rate=R82 Standard Conservation Fee: Adult Rate / Day=R328 Child rate=R164 ***For accommodation rates: please go to link:***

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			subsequently named the Kgalagadi Transfrontier Park.			catering; self-guided experience where hikers enjoy the Kalahari. • A short self-guided 4x4 trail Leeuwdril • ! Xerry Wilderness Hiking Trail named after the diminutive steenbok. It departs from Nossob every Wednesday from April to October, returning on Friday. The trail is self-catered guided experience where the hikers provide their own food, tents and water. This trail is bookable from the camps' reception (Twee Rivieren and Nossob) An armed and experienced guide will be in attendance to unlock the secrets of the Kalahari.	[Accommodation Pricing]()

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
13	Kruger national park	Mpumalanga	A wildlife paradise teaming up with wildlife, the Kruger National Park is the ultimate destination for the tourist seeking indigenous flora, fertile valleys, subtropical Lowveld vegetation and a diversity of habitat and wildlife. Kruger was established in 1898 as the Sabie Game reserve and proclaimed a national park in 1926, making it the oldest national park in South Africa. Rich in biodiversity, the park stretches for 350 km from	• Kruger conserves not only natural, but also cultural heritage. There are almost 254 known cultural heritage sites in the Kruger National Park, including nearly 130 recorded rock art sites. • Cultural artefacts of Stone Age man have been found for the period 100 000 to 300 000 years ago and more than 300 archaeological sites, with significant archaeological ruins at Thulamela and Masorini, have been found to date.	Bungalow Bush lodge Camping Cottage Family cottage Guest cottage Guest house Hut Safari tents Sleep over Hides	**WILDERNESS TRAILS** The wilderness trails provide accommodation, meals and guided bush walk experience. The trails start on either Wednesday or Sunday afternoon and last for 3 nights, with 2 days in between spent walking from one overnight hut camp to another. Overnight Wilderness Trails allow adventurous visitors a close, personal encounter with nature by traversing large areas of unspoiled wilderness on foot to share the ground with game like lion, elephant, zebra, giraffe etc. The wilderness trails are Wolhurter, Bushman, Metsi-Metsi, Napi, Nyalaland, Olifants and Sweni, all are bookable at Central Reservations. **BACK PACK TRAILS**	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			south to north along the Mozambican border to where South Africa, Mozambique and Zimbabwe meet at the infamous Crooks Corner. Together with Mozambique's Limpopo National Park and Zimbabwe's Gonarezhou, Kruger now also forms part of the Great Limpopo Transfrontier Park - a unique political innovation that created a colossal wilderness area. Over 1 million visitors per year flock to Kruger to experience close encounters with the wildlife in a natural unfenced environment. Some visitors go	• The Big Five - Buffalo, Elephant, Leopard, Lion and Rhino. • Birding Big Six - Ground Hornbill, Kori Bustard, Lappet-faced Vulture, Martial Eagle, Pel's Fishing Owl and Saddle-bill Stork. • Five Trees - Baobab, Fever Tree, knob Thorn, Marula, Mopane. • Natural/Cultural Features - Letaba Elephant Museum, Jock of the Bushveld Route, Albasani Ruins, Masorini Ruins, Stevenson Hamilton Memorial Library, Thulamela.		The backpacking trails stretches over 4 days and 3 nights with departures every Wednesday and Sunday covering about +/- 42km. The trails have no overnight huts and no prescribed route is followed. The hikers must be self-sufficient – bring and carry own tents, sleeping bags, food, gas stoves etc. A reasonable level of fitness is required. The Olifants Back Pack Trail runs from April to end of October and commences at Olifants Camp and is conducted mainly in the wilderness area in the banks of Olifants River. The Mphongolo Back Pack Trail runs from February to end November and commences at Shingwedzi camp and is conducted in the large wilderness area	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			there to relax while others want to experience nature in a more spiritual way. This jewel in the crown of SANParks is truly all things to all people and the natural heritage of all South Africans.			between the Shingwedzi and Mphongolo rivers. **The Lonely Bull Back Pack Trail** runs from February to end October and it starts from Shimuwini Camp and is conducted in the large wilderness area between the Letaba low water bridge and the Mingerhout dam along the Letaba River. **4X4 ECO TRAILS** The Lacombe Eco Trail is a guided +/- 500km overland trail that follows the eastern boundary of Kruger National Park along the Lebombo Hills, it commences at Crocodile Bridge in the south to end at Pafuri in the north. The trails operate from April to October and starts on a Sunday and ends on Thursday, a maximum of 5 vehicles and four passengers per vehicle	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
						are allowed. All vehicles must be self-sufficient and fully equipped with own camping and cooking equipment. It is bookable at Central Reservations. The Malopeni Eco Trail is a one-night guided adventure trail that runs throughout the year with access to remote areas, it starts at Phalaborwa gate to end at Letaba River. A maximum of 5 vehicles and four passengers per vehicle are allowed. All vehicles must be self-suffi cient and fully equipped with own camping and cooking equipment. It is bookable at Central Reservations. The Madlabantu 4x4 Adventure Trail, is a self-drive 42km, non-guided day trail that begins at Pretoriuskop – Fayi loop and winds southwards and along Nsikazi River through	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
						the big 5 countries. It is only bookable at Pretoriuskop reception desk. The Mananga 4x4 Adventure Trail, is a self-drive 48km, non-guided day trail that starts from Satara and takes you deep into the knob thorn/marula savannah where you will encounter the big 5. It is only bookable at Satara reception desk. **OTHER ACTIVITIES** Olifants Mountain Bike Trail is a guided 3 to 4 hours, morning and afternoon trail offered from Olifants camp. The mountain bike, helmet, backpacks, snacks and juice are supplied. Full day trails for maximum 6 participants can be arranged and a reasonable level of fitness is required. Bush Braai and Breakfast are available in most main rest camps – enquire at reception desk. The	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
						experience combines game viewing to and from a special site in the bush with a dining experience with cash bar. **Guided Bush Walks** are guided by two armed field guides and are offered from most Kruger camps. The morning and afternoon walks last 3 to 4 hours. Up to 8 guests are taken out of the camp's boundaries to explore surrounding wilderness areas on foot. Game Drives are available from all main Kruger camps and some entrance gates. The guided drives last up to 3 hours and are offered in the Morning, Sunset and at Night. An all- day game drive can also bear Golf – The Skukuza Golf Course dares you to play a round on an	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
						unfenced 9-hole (18 tee) in the heart of Big 5 country where uninvited spectators includes impala, warthog, hippo to mention a few. For Golf enquiries contact the Club at +27 13 735 5543. Picnic Spots - Most main rest camps have an area set aside for picnics and day visitors. There are also numerous picnic sites along main roads from the south to the north of Kruger. Some picnic sites have a small snack/curio shop and gas skottels (mobile frying pans on stands) can be hired for a nominal fee. ranged at selected camps. **DAY VISITORS** • All main rest camps have day visitor's area inside or nearby the rest camp. At the picnic spots visitors can (for a nominal	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
						fee) hire skottels (outdoor elevated frying pans) to cook meals on. • Camps with day visitor's areas located inside: Berg-en-Dal, Crocodile Bridge, Lower Sabie, Mopani, Olifants, Pretoriuskop, Punda Maria and Shingwedzi. • Camps with day visitor's areas located outside: Letaba, Orpen, Satara and Skukuza. • There is a maximum threshold of vehicles that can enter the park daily. If this threshold is reached, only visitors with pre-booked overnight accommodation will be permitted access. Such situations tend only to arise in extreme cases such as public holidays and long weekends.	

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
14	Mapungubwe national park and world heritage site	Limpopo	The wealth of Mapungubwe was realized in the 1930s when valuable artifacts were found on the sacred hill. Further archaeological work revealed the extensive historical importance of the wider region. The Mapungubwe cultural Landscape was declared a national heritage site in December 2001, and listed as a World Heritage Site in July 2003.	The Lost City Visitors must experience Mapungubwe Hill, where a far developed African civilization prospered between 1200 and 1270 AD. A growing Iron Age community already inhabited this area since 900 AD, and became rich by means of trade with foreign civilizations like Egypt, India and China. It's here where archaeologists unearthed the famous golden rhino and other evidence of a wealthy African kingdom.	Vhembe wilderness trails camp Leokwe rest camp Limpopo forest tented camp Tshugulu lodge Mazhou camping site	• Restaurant • Retail • Picnic Facilities • Swimming Pool (overnight only) • Treetop Boardwalk • Rides • Interpretation Centre • Lookout Point	South African Citizens and Residents (with ID): Adult Rate / Day=R48 Child rate=R24 SADC Nationals (with passport) Adult Rate / Day=R96 Child rate=R48 Standard Conservation Fee: Adult Rate / Day=R192 Child rate=R96 ***For accommodation rates: please go to link:*** Accommodation Pricing
15	Marakele national park	Limpopo	One of the younger national parks in South Africa, Marakele was initiated in	• A narrow tar road takes visitor up to the top of the Waterberg massif. The	Bontle camping site Tlopi tented camp Motswere guest house	• Bird watching • Sunset drives and morning drives • Game viewing	South African Citizens and Residents (with South African Citizens and

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			1986 when the State purchased a nucleus of five farms totalling about 15 000 ha. The park was initially proclaimed in 1994 as the Kranberg National Park, and has since grown to about 90 000 ha. It is still in a phase of considerable expansion.	views and scenery is spectacular. • One is also in the proximity of the vulture colony and these large birds will soar at close quarters. • Explore the Waterberg Mountain's untrammeled land. The Marakele 4x4 Eco Trail is a 3-day (2 nights) outdoor adventure spanning the wilderness, primitive zone of Marakele National Park which is the core of the Waterberg Biosphere Reserve. Called the "wilderness experience on wheels", the Trail follows the management	Thutong environmental learning centre Luxury accommodation (concession)	• Morning Bush walks • Mountain pass up to an incredible view and proximity to the vulture colony • 4x4 Eco Trail	Residents (with ID): Adult Rate / Day=R48 Child rate=R24 SADC Nationals (with passport) Adult Rate / Day=R96 Child rate=R48 Standard Conservation Fee: Adult Rate / Day=R192 Child rate=R96 ***For accommodation rates: please go to link:*** [Accommodation Pricing]

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
				tracks on the eastern boundary of the Marakele National Park on top of the Waterberg Mountains. Experienced, professional guides act as trail leaders and will interpret the various eco-zones the trail crosses, at regular intervals.			
16	Mokala national park	Northern Cape	This new National Park replaces the Vaalbos National Park, which was deproclaimed. 19 June 2007 was the official proclamation, naming and launch of Mokala National Park by the Minister of Environmental Affairs and Tourism.	• Black Rhino, white Rhino • Black Wildebeest • Cape Buffalo • Indigenous plant species	Mosu lodge Mofele lodge Lilydale lodge Haak-en-steek Motswedi camp site	• A brand new park presents brand new opportunities for a lot of outdoor adventure. A number of exciting activities such as day walks, sunset and night drives and bush braais and bush breakfast will be available. • Because of the perfect night skies, Mokala plans to incorporate star-gazing as a night time activity, along with	South African Citizens and Residents (with ID): Adult Rate / Day=R40 Child rate=R20 SADC Nationals (with passport) Adult Rate / Day=R80 Child rate=R40 Standard Conservation Fee: Adult Rate / Day=R160 Child rate=R80

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			Mokala is the Setswana name for "camel thorn tree"			wildlife documentary DVD shows. • Rock art painting and engraving excursions, along with guided horse trails will also be introduced.	***For accommodation rates: please go to link:*** [Accommodation Pricing]()
17	Mountain zebra national park	Western Cape	The Mountain Zebra National Park, located near Cradock in the Eastern Cape, was proclaimed in 1937 for the purpose of protecting a remnant population of the Cape mountain zebra, Equus zebra. The species was almost on the verge of extinction, with as few as 100 of these	• Visitors often spot some of the rarer wildlife species such as aardwolf and the bat eared fox. • You can get up close to the cheetahs with cheetah tracking. • Visit the chessboard that the British soldiers created on the top of Salpeterskop o the Salpeterskop hike. • Take a guided trip to see ancient	Mountain zebra main rest camp Doornhoek guest house Mountain cottages	• Self-drive Game Viewing • Salpeterkop Hike • Guided game drives • Picnic sites • Guided Walks • Impofu 3-day hike • Guided visit to San cave painting • Three 4x4 trails • Cheetah Tracking • Conference room for small groups	South African Citizens and Residents (with ID): Adult Rate / Day=R40 Child rate=R20 SADC Nationals (with passport) Adult Rate / Day=R80 Child rate=R40 Standard Conservation Fee: Adult Rate / Day=R160 Child rate=R80 ***For accommodation rates: please go***

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			animals in existence in 1940. By 1981 the Cape mountain zebra population in the MZNP had grown to 200. Recent expansion to over 28 000 hectares has allowed the zebra population to increase to over 750 animals. Cheetah were introduced in 2007, becoming the first large predators to roam the Park in over 100 years and lions were introduced in 2013 fulfilling an important role of mega-predator in the ecosystem.	Bushmen paintings.			***to link:*** Accommodation Pricing
18	Namaqua national park	Northern Cape	The park was established in 1998 when SANParks took	• Wild flowers (in season) • Quiver trees	Skilpad rest camp Luiperdskloof guest cottage	• Picnic sites • Circular drive (5 km) with viewpoints	South African Citizens and Residents (with

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			over management of the 900 ha Skilpad Wildflower Reserve. Since then the park has expanded to 120 000 ha, with more land to be added in the next few years. The park will eventually stretch from the Kamiesberg mountains to the sea. This range of habitats will include a wide array of very rare animals and plants into the national Park.	• Klipspringer • Black Harrier • Quartz Patches	Namaqua coastal camping	during the spring flowering season • Several short nature trails • Caracal 4x4 Eco route • 153 km, takes visitors to the most spectacular scenery from the Kamisberg to the breath taking West coast	ID): Adult Rate / Day=R40 Child rate=R20 SADC Nationals (with passport) Adult Rate / Day=R80 Child rate=R40 Standard Conservation Fee: Adult Rate / Day=R80 Child rate=R40 ***For accommodation rates: please go to link:*** Accommodation Pricing
19	Table mountain national park	Western Cape	Table Mountain National Park was established in 1998 to protect the environment of the Table Mountain chain on the incredibly	• The Cape of Good Hope (Cape Point) • Boulders Penguin Colony • Silvermine • Table Mountain • Signal Hill and Lion's Head	Olifantsbos cottage Eland & duiker Wood owl cottage (tokai) Platteklip wash house Overseers cottage	• Hiking • Surfing / Wind Surfing • Overnight Trails (including the epic Hoerikwaggo Trail) • Rock / Sport Climbing • Dog Walking • Hang / Paragliding	***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			scenic Cape Peninsula. The park stretches from Signal Hill in the north to Cape Point in the south and also encompasses the dramatic seas and rugged coastline of the peninsula. It is home to incredible fauna and flora and a whole host of spots to explore.	• Oudekraal	Luxury accommodation (concessions) Hoerikwaggo tented camps Orange kloof tented camp – sleep within an ancient forest Silvermine tented camp – explore the fynbos covered mountain Slangkop tented camp – unwind by the sea Smitswinkel tented camp – get to the 'point'	• Scuba Diving • Fishing / Extractive Diving • Mountain Biking • Picnic / braai	
20	Tankwa national park	Northern Cape	Just a four-hour drive from Cape Town brings you to the ideal destination for those seeking the brightest stars in Africa, a once in a lifetime glimpse of a rare endemic	• Situated within an internationally recognized Biodiversity Hotspot, Tankwa will speak to the mind of everyone serious about conserving our heritage for future generations.	Elandsberg wilderness camp Farm cottages Tankwa guesthouse Camping	• Self-drives on demarcated roads • Hiking • Bird watching • Mountain biking • Swimming • Canoeing • 4x4 –trail • Picnic	South African Citizens and Residents (with ID): Adult Rate / Day=R40 Child rate=R20 SADC Nationals (with passport) Adult Rate / Day=R80 Child rate=R40

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			bird, or perhaps nothing more than a silence that reached deep into the soul. Named after the Tankwa River that runs through it as the main provider in an otherwise semi-desert area, the Park was proclaimed in 1986. Since then high biodiversity land was added by SANParks to increase the conservation area from the original 26 000 ha to nearly 138 000 ha. The true meaning of the word “Tankwa” is unknown, but is said to be “Turbid Water”, “Place of the San” or Thirstland”, all	Unique features vegetation is combined with mind-blowing landscapes; from the sheer cliffs of the Tankwa Desert, you will experience nature in its ever-changing state! • The 1,000 ha Oudebaaskraal Dam adds another perspective to the word ‘desert’. Magnificent sunrises with various bird species will make your early morning an experience to remember…… • For birders the above average chance to spot the notorious Burchell’s Courser as well as other Karoo endemics makes			Standard Conservation Fee: Adult Rate / Day=R160 Child rate=R80 ***For accommodation rates: please go to link:*** [Accommodation Pricing]

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
			of which fits this spectacular park.	a visit well worth it.			
21	West coast national park	Western Cape	The unique and diverse habitats of the Langebaan Lagoon and its salt marshes and wetlands, the granitic islands of Saldanha Bay with its large breeding populations of seabirds, the varied rocky and sandy shores of the coastal strip, the parabolic coastal dune fields and the terrestrial lowland fynbos communities on calcareous soils form the current extent – some 32 000 ha – of the West Coast National Park.	• Wildflower viewing (August and September) • Geelbek Information Centre with a replica of Eve's footprints • The bird hides at Geelbek and Seeberg • Viewing points • Cape Gannet • Preekstoel Information Spot • Flamingos • The Langebaan Lagoon • Waders • Kraalbaai picnic and braai spot • Black Harrier • Tsaarsbank picnic spot • Eland • The houseboats	Abrahamskraal cottage Joanne's beach cottage Geelbek stables Houseboats Duinepos	• Game viewing from own vehicle • Flower Trail – Postberg section in August and September • Hiking Trails - Overnight & Day Trails • Picnic, barbeque and ablution facilities for day visitors • Dining at the Geelbek Restaurant • Bird watching • Whale watching (September/October) • Mountain Biking Trail • Cycling • Kayaking • Swimming • Kite surfing & kite boarding	**OUTSIDE FLOWER SEASON** South African Citizens and Residents (with ID): Adult Rate / Day=R54 Child rate=R27 SADC Nationals (with passport) Adult Rate / Day=R80 Child rate=R40 Standard Conservation Fee: Adult Rate / Day=R80 Child rate=R40 ***For accommodation rates: please go to link:*** Accommodation Pricing

No.	Name of Park	City and province	Brief description	Attractions in the park	Accommodation available	Activities	Tariffs
				• Geelbek Restaurant and wedding venue			