

GLOBAL TOURISM PERFORMANCE



Arrivals-Oct-Dec 2016 (Source: UNWTO Jan 2017)

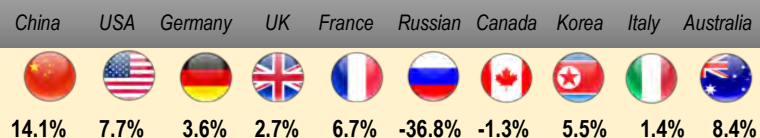
↑ **4.9%**

(Up from 4.1% compared to same period last year)

Global tourist arrivals by region- Oct-Dec 2016 (Source: UNWTO bar. Jan 2017)

	Europe	Asia & the Pacific	Americas	Africa	Middle East
Oct-Dec 2016	3.1%	6.4%	5.4%	11.3%	3.5%
Oct-Dec 2015	3.8%	6.2%	6.2%	-1.8%	-6.7%

Expenditure by top 10 countries- YTD –Jan 2017 (Source: UNWTO bar. Jan 2017)



Total air passenger market ((Source: IATA_Dec 2016) Year on Year



	RPK	ASK	PLF
Total Market	8.80%	6.60%	80.60%
International	9.70%	7.20%	80.20%
Domestic	7.10%	5.80%	81.50%

- RPK-Revenue Passenger Kilometre
- ASK- Available Seat Kilometre
- PLF-Passenger Load Factor

INBOUND TOURISM

ACCOMODATION



Income from accommodation

R6 584.5m- Oct –Dec 2016

↑ **8.8%** compared to Oct. - Dec 2015

(Source: StatsSA)

Average occupancy rate

54.7%- Oct-Dec 2016 (down by 0.3%

when compared same period last year)

Source: StatsSA

FOOD AND BEVERAGE



Income from Food and Beverages

R 11 551.1m- Oct-Dec 2016

↑ **0.3%** compared to same period last year

Source: StatsSA

DOMESTIC TOURISM PERFORMANCE



Trips

R7.1m –Q4 2016

↓ **15%** compared to Q4 2015

Source: SAT



Length of stay

5.6 nights- Q4 2016

↑ **4%** compared to Q4 2015

Source: SAT



Total domestic direct Spend

R7,668bn–Q4 2016

↓ **11%** compared to R8,568bn Q4

of 2015 - Source: SAT



Most visited province

- Limpopo_37%;
- KZN_18%;
- GP_14%

Source: SAT



Spend by purpose

VRF_ 45%; Holiday_ 32%

Business_ 16%

Source: SAT

Trips by purpose

VRF_ 69%; Business_13%

Holiday_ 8%

Source: SAT

PASSENGER & AIRCRAFT MOVEMENT



Air passenger movement (Oct – Dec 2016)

International 7.0% ↑

Regional 1.0% ↑

Domestic -1.0% ↓

Unscheduled -22.0% ↓

Aircraft movement (Oct-Dec 2016)

International 4.0% ↑

Regional 1.0% ↑

Domestic -1.0% ↓

Unscheduled -13.0% ↓

(Source: ACSA Q4 2016)

GLOBAL DEVELOPMENTS

- The UNWTO and the World Travel Market (WTM) organised the Tourism Minister's Summit to discuss safety, security and seamless travel <http://www.traveldailynews.com/post/unwtowtm-ministers-sumit-discusses-safe-and-seamless-travel>.
- The International Sustainable Tourism Symposium titled "advancing sustainable tourism in a changing climate" was held in Morocco in November 2016. <http://www.wtc.org/media-centre/press-release/2016/adressing-climate-change-is-now-a>
- On November 2016, the European Union (EU) published a directive of the EU Parliament and the Commission on the promotion of the use of energy from renewable resources. <http://www.traveldailynews.com/post/eu-renewable-enerfy-directive-must-prioritize-sustainable-aviation-fuels>.

SOUTH AFRICAN DEVELOPMENTS

- Minister of Tourism launched the tourism facilities at Komjekejeke Heritage Site in Wallmansthal, Pretoria."- (Source: <http://www.tourism.gov.za>)
- Minister of Tourism launched the Tourism Enterprise Development Incubator on the 28th of October 2016- (Source: <http://www.tourism.gov.za>)
- Gauteng and Western Cape Lilizela Tourism Provincial Awards Ceremony took place on the 29th -30th of September 2016 respectively. ."-(Source: <http://www.tourism.gov.za>)
- International Tourist Guiding Celebrations took place on the 2nd-3rd of March 2017 at Robben Island-(Source: <http://www.tourism.gov.za>)

Upcoming events

- 2017 Tourism Indaba to be launch from 16-18 May 2017, Durban
- 2017 Local Government Tourism Conference to be held on the 3rd-4th of April 2017, Emperors Palace, Johannesburg

SOUTH AFRICAN ECONOMIC INDICATORS

Petrol price_ (As at 01 Mar 2017)

	Inland	Coastal
Unleaded 93	R13.30	R12.92
Unleaded 95	R13.54	R13.06
Diesel (0.05%)	R11.64	R11.24

Source: The AA fuel pricing 2017



Consumer Price Index

↑ **6.3%** - February 2017

(Source: StatsSA)



Rand/Dollar exchange

R12.94

(As at 28/03/2017)

Source: News 24



Gross Domestic Product

↓ **0.3%** -Q4 2016

(Source: StatsSA)

ANNUAL STANDING ITEMS_2016

Global International arrivals (million)

	2016	2015	% Change
Europe	617.9	607.5	2.0%
Asia and pacific	302.9	279.3	8.4%
Americas	200.9	192.7	4.3%
Africa	58.2	53.8	8.1%
Middle east	53.6	55.9	-4.1%
World(Total)	1,235	1,189	3.9%



Global Air passenger Market

Revenue Passenger Kilometer_ **6.3%**;Passenger Load Factor_ **80.5%**

(Source: IATA_Jan-Dec 2016)

South African tourist arrivals

Tourist arrivals by region- Jan-Dec 2016 (SAT Table B-Dec 2016)

Region	Europe	North America	Central and South America	Australasia	Asia	Middle East	Africa mainland
2016	1525836	406192	67546	131910	328030	71532	7472494
2015	1317291	353450	50304	118923	251682	53338	6722800
%Change	15.8%	14.9%	34.3%	10.9%	30.3%	34.1%	11.2%



Air passenger market (Jan –Dec 2016)

International – **11 080 996**Regional – **1 132 956**Domestic – **27 398 218**Unscheduled – **135 136**

(Source: ACSA), Jan- Dec 2016

REFERENCES

- <http://www.statssa.gov.za/publications/P6410/P6410December2016.pdf>
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GLOBAL AND SOUTH AFRICAN ECONOMIC INDICATORS

Indicators	Global		South African		
	2015 ¹	2016 ²	TSA 2015 ⁵ Provisional	2015 ⁴	2016 ³
Direct contribution to GDP (bn)	USD2,229.8	USD2,306	R118 928	R 118 638	R127.9bn
% Contribution	3.0%	3.1%	3.0%	3.0%	3.0%
Total contribution to GDP (bn)	USD7,170.3	USD7,613.3	-	R375,5	R402.2bn
% Contribution	9.8%	10.2%	-	9.4%	9.3
Direct contribution to employment ('000 jobs)	107,833	108,741	711 746	703 000	716 500
% Contribution	3.6%	3.6%	4.5%	4.5%	4.6
Total contribution to employment (000 jobs)	283,578	292, 220	-	1 554 000	R1 553 000
% Contribution	9.5%	9.6%	-	9.9%	9.8%
Visitor exports (bn)	1,308.9	USD1,401.5	-	R115,0	R128.3bn
Domestic spending (bn)	9,419.9	USD3,574.6	-	R141,2	R10.2bn
Capital investment (bn)	774.6	USD 806.5	-	R63,7	R4.7bn

- Source:** - 1. World Travel and Tourism Council: Travel & Tourism Economic Impact 2016
 2. World Travel and Tourism Council: Travel & Tourism Economic Impact 2017;
 3. World Travel and Tourism Council: Travel & Tourism Economic Impact 2017 South Africa
 4. World Travel and Tourism Council: Travel & Tourism Economic Impact 2016 South Africa
 5. Stats SA. Tourism satellite Account for South Africa. Final 2013 and provisional 2014 and 2015;

NB: Data used is based on different periods, based on availability.

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