

GLOBAL TOURISM PERFORMANCE



Arrivals-Jan-April 2016 (Source: UNWTO July 2016)

↑ 5.3%
(18 million more tourists than the same period last year)

Global tourist arrivals by region-Jan-April 2016 (UNWTO July 2016)

	Europe	Asia & the Pacific	Americas	Africa	Middle East
Jan-April 2016	4.4%	8.7%	5.9%	6.7%	-7.2%
Jan-April 2015	4.7%	5.6%	5.9%	-3.3%	1.7%

Expenditure by top 10 countries-Jan-March 2016 (Source: UNWTO July 2016,)

China	USA	Germany	UK	France	Russian	Canada	Korea	Italy	Australia
20.0%	8.8%	4.5%	-1.4%	-4.1%	-41.6%	-2.6%	3.6%	2.7%	12.7%

Total air passenger market (Source: IATA July 2016)



	RPK	ASK	PLF
Total Market	5.90%	6.00%	83.70%
International	7.10%	7.30%	83.50%
Domestic	3.80%	3.70%	84.00%

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

GLOBAL DEVELOPMENTS

- 2016 Olympics games held in Rio de Janeiro, South Africa won 10 medals in the process (www.rai.com)
- G20 Summit held at West lake in Hangzhou, Zhejiang, China
- International tourist arrivals report for January to June released by UNWTO on 29th September 2016. International tourist arrivals grew by 4% in the process. (www.unwto.org/news)
- World Tourism day celebrated in Bangkok, Thailand by about 500 delegates from 60 countries. The theme for 2016 World Tourism Day was "Accessible Tourism". (www.unwto.org/news)
- Summer Olympics were held in Rio de Janeiro, Brazil from 05 to 21 August 2016 (www.wikipedia.org/wiki/2016_Summer_Olympics)
- UEFA European Cup held in France from 10 June to 10 July 2016 (www.uefa.com/uefaeuro)

INBOUND TOURISM

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

Region	Europe	North America	Central and South America	Australasia	Asia	Middle East	Total Africa
2016	804063	234068	33400	70452	189368	39698	4413946
2015	698667	196677	28239	63067	133625	28978	3883625
%Change	15.1%	19.0%	18.3%	11.7%	41.7%	37.0%	13.7%

ACCOMODATION



Income from accommodation
R4 748.6m- April –June 2016
↑ 10.4% compared to April-June 2015
(Source: StatsSA)

Average occupancy rate
48.2%- April-June 2016 (Unchanged when compared same period last year)
Source: StatsSA

FOOD AND BEVERAGE



Income from Food and Beverages
R 9 674.8m- April-June 2016
↑ 2.1% compared to same period last year
Source: StatsSA

DOMESTIC TOURISM PERFORMANCE



Trips
R7.3m-Q1 2016
↑ 58.7% compared to Q1 2015
Source: SAT



Total domestic direct Spend
R8.8bn-Q1 2016
↑ 91.3% compared to Q1 2015
Source: SAT



Length of stay
3.6 nights- Q1 2016
↓ 2.7% compared to Q1 2015
Source: SAT



Trips by purpose
VRF_ 70%; Business_ 11%
Holiday_ 9%
Source: SAT

PASSENGER & AIRCRAFT MOVEMENT



Air passenger movement (quarter 2_2016)

International **3.4%** ↑
Regional **7.6%** ↑
Domestic **5.8%** ↑
Unscheduled **2.9%** ↑

Aircraft movement (Q2_2016)

International **-0.9%** ↓
Regional **-0.1%** ↓
Domestic **3.4%** ↓
Unscheduled **-2.5%** ↓

(Source: ACSA Q2 2016)

SOUTH AFRICAN DEVELOPMENTS

- World Tourism Day celebrated on the 27th of September 2016 under the theme "Tourism for All-Promoting Universal Accessibility"- (Source: <http://www.tourism.gov.za>)
- Symposium to review tourism policy framework in South Africa held on the 06th of September 2016- (Source: <http://www.tourism.gov.za>)
- National Parks Week celebrated on the week of 12 to 17 September 2016. All South Africans were allowed to enter national parks for free between 9h00 and 17h00. (Source: https://www.sanparks.org/about/events/parks_week/)
- National Tourism Career Expo hosted on the 30th of September to 02 October 2016 in Bloemfontein- (Source: <http://www.tourism.gov.za>)
- World Tourism Day held at Free State on the 27th of September 2016 - (Source: <http://www.tourism.gov.za>)

Upcoming events

- 2016/17 National Blue Flag Season launched on the 07th of October 2016

SOUTH AFRICAN ECONOMIC INDICATORS

Petrol price_ (As at 07 Sep 2016)

	Inland	Coastal
Unleaded 93	R11.90	R11.52
Unleaded 95	R12.17	R11.69
Diesel (0.05%)	R10.49	R10.10



Consumer Price Index
5.9% - August 2016
(Source: StatsSA)



Rand/Dollar exchange
R13.80 (As at 06/10/2016)
Source: News24



Gross Domestic Product
↑ 3.3% -Q2 2016
(Source: StatsSA)

ANNUAL INDICATORS: 2015 TOURISM PERFORMANCE

2015 ANNUAL GLOBAL STANDING ITEMS



Arrivals (2015)

1,186 million

↑ 4.6% compared to 2014

(Source: UNWTO Highlights 2016)

- Annual Global tourist arrivals increased by 52 million to reach 1,184 millions in 2015

Top 10 Countries tourist arrivals (Million) (Source: UNWTO Highlights 2016)

France	USA	Spain	China	Italy	Turkey	Germany	UK	Mexico	Russian Fed
84.5	77.5	68.2	56.9	50.7	39.5	35.0	34.4	32.1	31.3



Spend

US\$ 1,232bn - 2015

(Source: UNWTO May 2016)



Air passenger Market

Revenue Passenger Kilometer **6.5%**;

Passenger Load Factor **80.4%**

(Source: IATA)

Hotel occupancy by region (Source: UNWTO_March 2016)

	Europe	Asia & the Pacific	Americas	Africa & Middle East
2015	70.10%	68.20%	65.30%	62.90%
2014	68.60%	68.20%	64.30%	63.40%

ANNUAL SOUTH AFRICAN STANDING ITEMS

Domestic

Domestic tourist trips

24.5 million

↓ -12.5% compared to 2014

Total Direct Domestic Spend

R 23.6 billion

↓ -11.9% compared to 2014

Length of stay by domestic tourists

4.2 nights

↑ 5.0% compared to 2014

Geographical spread

2% visited more than 1 province

Source: SAT Annual report, 2015



International

Foreign tourist arrivals

8.9 million

↓ -6.8% compared to 2014

Arrivals by market

Land_ 6.4m; Air_ 362 860

Total Foreign Direct Spend

R 68.2 billion

↑ 6.2% compared to 2014

Length of stay by foreign tourists

9.5 nights

↑ 10.5% compared to 2014

Geographical spread

13% visited more than 1 province



Air passenger market

International – **10 644 432**

Regional – **1 085 562**

Domestic – **26 637 310**

Unscheduled – **146 440**

(Source: ACSA), 2015

GLOBAL AND SOUTH AFRICAN ECONOMIC INDICATORS

Indicators	Global		South African		
	2015	2016 Estimates	TSA 2014 Provisional	2015	2016 Estimated
Direct contribution to GDP (bn)	USD2,230	USD2,304	R111 560	R 118 638	R123 294
% Contribution	3%	3%	2.9%	3.0%	3.0%
Total contribution to GDP (bn)	USD7,170	USD7,421	-	R375,5	R 386,8
% Contribution	9,8%	9,8%	-	9,4%	9,5%
Direct contribution to employment (million)	107.833	109 864	680 817	703 000	729 600
% Contribution	3,6%	3,6%	4,5%	4,5%	4,6%
Total contribution to employment (million)	283 578	289 756	-	1 554 000	1 557 000
% Contribution	9,5%	9,6%	-	9,9%	9,8%
Visitor exports (bn)	USD1,309	USD1,348	-	R115,0	R120,8
Domestic spending (bn)	USD3,420	USD3,534	-	R141,2	R145,3
Capital investment (bn)	USD 775	USD 811	-	R63,7	R66,2

Source: - World Travel and Tourism Council: Travel & Tourism Economic Impact 2016;

- Stats SA. Tourism satellite Account for South Africa. Final 2012 and provisional 2013 and 2014;

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

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