





tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

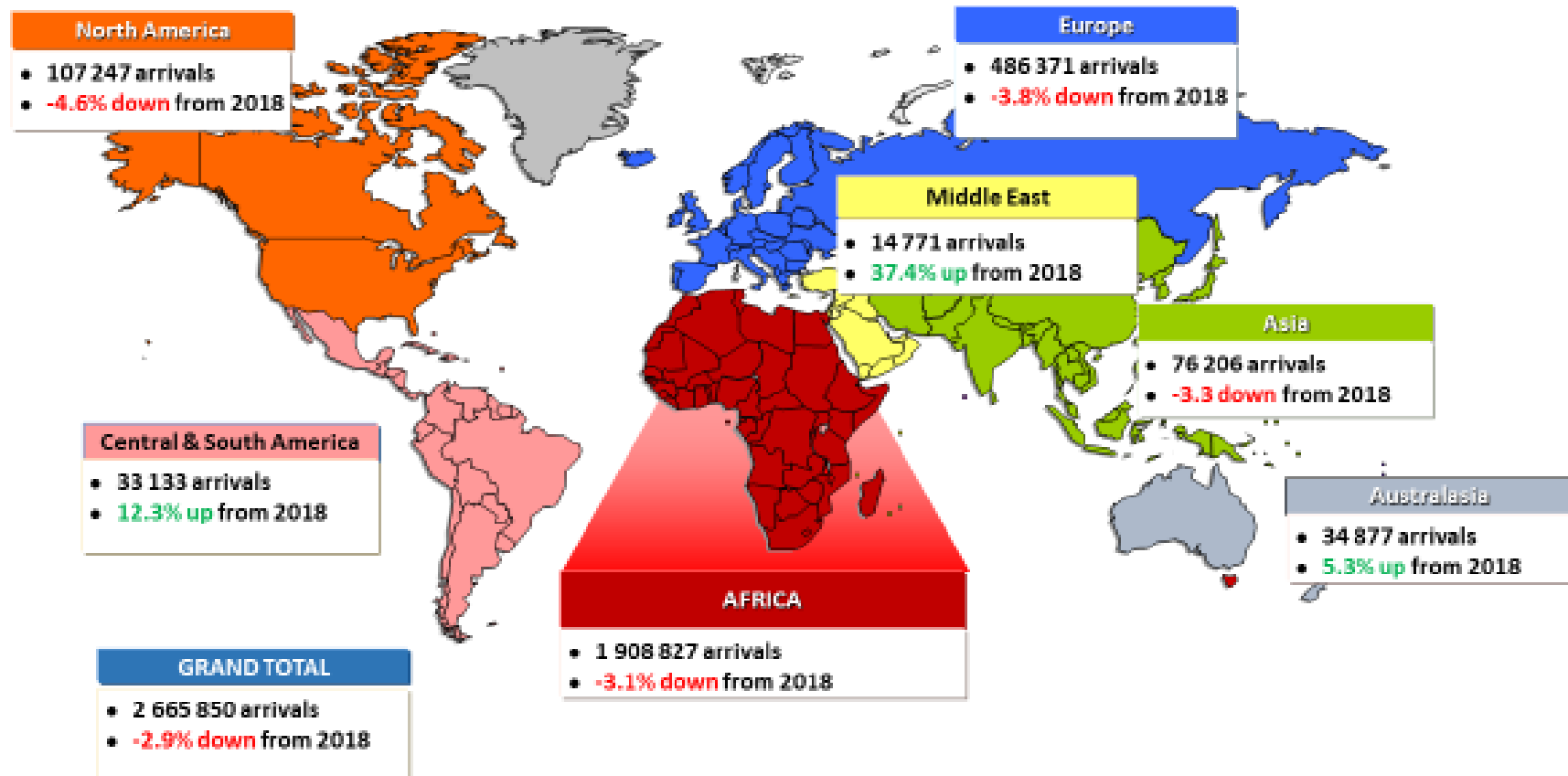
**TOURISM QUARTERLY PERFORMANCE REPORT:
4th EDITION
(OCTOBER -DECEMBER 2019)**

TABLE OF CONTENTS

Key Indicator	Page No.	Key Indicator	Page No.
SECTION ONE		SECTION THREE	
MAP OF SOUTH AFRICAN INBOUND TOURISM PERFORMANCE 	3	SOUTH AFRICA'S RELATED TOURISM INDUSTRIES PERFORMANCE 	5
SECTION: TWO		ACCOMMODATION:-Total Income - Occupancy Rate - Stay Units Available	5
SOUTH AFRICAN INBOUND TOURISM PERFORMANCE 4 Total Tourist Arrivals Tourist Arrivals by Region Top Ten Overseas Markets Top Ten African Markets	4	FOOD AND BEVERAGE:-Total Income	5
		AVIATION:-Passenger Arrival Movements Passenger Departure Movements	6
		SECTION FOUR	
		SOUTH AFRICAN DIRECT TOURISM EMPLOYMENT ESTIMATES	6
		REFERENCES	7
		ANNEXURES: INFOGRAPHICS Annexure 1: Top ten South African overseas and African markets Annexure 2: Global inbound tourism performance	8 9

SECTION 1: SOUTH AFRICAN INBOUND TOURISM PERFORMANCE: OCTOBER-DECEMBER 2019 COMPARED TO OCTOBER-DECEMBER 2018

Figure 1: Total Tourist Arrivals by Region: Oct-Dec 2019 vs. Oct-Dec 2018



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

SOUTH AFRICAN INBOUND TOURISM PERFORMANCE: OCTOBER-DECEMBER2019 COMPARED TO OCTOBER-DECEMBER2018

Arrivals for the period Oct-Dec 2019 compared to the same period in 2018 are indicated in Table 1 below. Total tourist arrivals (2 665 850) went down by -2.9% for the period Oct-Dec 2019 compared to arrivals recorded during the same period in 2018 (2 744 373). Total tourist arrivals from the overseas market decreased by -2.2% (-17 280), which was influenced by a decline from North America (-4.6%), Europe (-3.8%) and Asia (-3.3%). Middle East had the highest increase in overseas markets with a growth of 37.4% followed by Central and South America (12.3%) and Australasia (5.3%). Most countries in the Middle East had an increase in tourist arrivals and Israel recorded the highest increase in volume of 3 222 tourists, equivalent to 52.0% growth. The increase in Central and South America was driven by an increase in tourist arrivals from most countries from this region. And these countries included Brazil recording the highest growth in volume moving from 18 810 to 23 304 tourist arrivals resulting in an additional 4 494 tourists from this country for the Oct-Dec 2019 period. The decline recorded in Europe was influenced by most of the countries which experienced a negative growth in the region, with France having the highest decline in volume of -8 802 (-15.4%) tourist arrivals. The decline from Asia was driven by a decrease of -7.5% (-1 813) of tourist arrivals from China. Tourist arrivals from Africa declined by -3.1% (-61 674) during the same period under review.

Table 1: Total Tourist Arrivals by Region Oct-Dec 2019 vs. Oct-Dec 2018

REGION	Oct-Dec2019	Oct-Dec2018	Diff	% Diff
EUROPE	486 371	505 389	-19 018	-3,8%
NORTH AMERICA	107 247	112 367	-5 120	-4,6%
CENTRAL & SOUTH AMERICA	33 133	29 492	3 641	12,3%
AUSTRALASIA	34 877	33 113	1 764	5,3%
MIDDLE EAST	14 771	10 750	4 021	37,4%
ASIA	76 206	78 774	-2 568	-3,3%
TOTAL OVERSEAS	752 605	769 885	-17 280	-2,2%
TOTAL AFRICA	1 908 827	1 970 501	-61 674	-3,1%
Unspecified	4 418	3 987	431	10,8%
GRAND TOTAL	2 665 850	2 744 373	-78 523	-2,9%

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

Table 2 gives the rankings of the top ten African source markets for the period Oct-Dec 2019 compared to Oct-Dec 2018. Most of the top ten African markets remained at the same position for the period under review except for Malawi, which improved its 7th position in 2018 by taking the 6th position in 2019 and Namibia dropped from the 6th to 7th position in 2019. Tanzania moved from the

11th position in 2018 to 10th position in 2019 removing Nigeria from the top 10 list. Most countries from the top ten African source markets experienced a decline in tourist arrivals except for Malawi (3.3%), Tanzania (2.2%) and Swaziland (0.7%). Malawi experienced the highest growth of 3.3%, which translated to additional 1 699 tourist arrivals during Oct-Dec 2019.

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

COUNTRY	RANK: Oct-Dec2019	Tourist Arrivals Oct-Dec2019	RANK: Oct-Dec2018	Tourist Arrivals Oct-Dec2018	% Change from Oct-Dec2018 to Oct-Dec2019
Zimbabwe	1	561 608	1	572 204	-1,9%
Lesotho	2	363 004	2	384 421	-5,6%
Mozambique	3	328 291	3	333 301	-1,5%
Swaziland	4	238 646	4	236 898	0,7%
Botswana	5	194 913	5	200 198	-2,6%
Malawi	6	52 778	7	51 079	3,3%
Namibia	7	49 859	6	57 422	-13,2%
Zambia	8	38 980	8	42 986	-9,3%
Angola	9	14 160	9	16 596	-14,7%
Tanzania	10	10 484	11	10 263	2,2%

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

Table 3 shows the rankings of the top ten overseas source markets. Comparing Oct-Dec 2019 with Oct-Dec 2018, most top 10 overseas markets recorded a decrease in tourist arrivals except for Brazil (23.9%), UK (4.2%) and Australia with 1.5% growth. Despite this decline, most of the top ten overseas markets remained in the same position for Oct-Dec 2019 period. However, Brazil improved its position from 12th in 2018 to 7th position in 2019. China moved downwards from 7th position in 2018 to 9th position in 2019. Switzerland moved from 9th position in 2018 to 10th position in 2019. UK remained the main source market from overseas.

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

COUNTRY	RANK: Oct-Dec2019	Tourist Arrivals Oct-Dec2019	RANK: Oct-Dec2018	Tourist Arrivals Oct-Dec2018	% Change from Oct-Dec2018 to Oct-Dec2019
UK	1	130 859	1	125 552	4,2%
Germany	2	115 754	2	118 823	-2,6%
USA	3	87 537	3	91 585	-4,4%
France	4	48 303	4	57 105	-15,4%
Netherlands	5	43 244	5	45 326	-4,6%
Australia	6	29 150	6	28 720	1,5%
Brazil	7	23 304	12	18 810	23,9%
India	8	22 814	8	22 870	-0,2%
China	9	22 350	7	24 163	-7,5%
Switzerland	10	19 960	9	20 989	-4,9%

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

SECTION 2: PERFORMANCE OF OTHER TOURISM RELATED INDUSTRIES (OCT-DEC 2019)

1. ACCOMMODATION:

ACCOMMODATION INDUSTRY INCOME: OCT-DEC 2019 COMPARED TO OCT-DEC 2018

The total income from accommodation went up slightly from R7 017.9 million in Oct-Dec 2018 to R7 072.6 million in Oct-Dec 2019, which was an increase of about 0.8% as indicated in Table 4 below. Compared to the previous quarter, other accommodation establishments had the highest growth of 10.4%. Other category includes lodges, bed-and-breakfast, self-catering and 'other' establishments not classified. Hotel establishments received the highest share (64.7%) of income during this period followed by other accommodation with 30.5%.

Table 4: Income from accommodation: Oct-Dec 2019 compared to Oct-Dec 2018

Type of Accommodation	Oct-Dec2018	Oct-Dec2019	% Change	% share
Hotels (R million)	R4 680,9	R4 573,5	-2,3%	64,7%
Caravan parks and camping sites (R million)	R77,0	R82,7	7,4%	1,2%
Guest houses and guest farms (R million)	R308,1	R261,7	-15,1%	3,7%
Other accommodation (R million)	R1 951,9	R2 154,7	10,4%	30,5%
Total Industry	R7 017,9	R7 072,6	0,8%	100%

Source: Stats SA: Accommodation data cuts, February 2020

ACCOMMODATION INDUSTRY OCCUPANCY RATE: OCT-DEC 2019 COMPARED TO OCT-DEC 2018

The average occupancy rates for Oct-Dec 2019 compared to Oct-Dec 2018 is provided in Table 5. Using seasonally adjusted figures, total industry average occupancy rate for the period Oct-Dec 2019 was 40.8%, which was a decline compared to the same period in 2018 that had 48.3%. Most accommodation types experienced a decline in average occupancy rates except for other accommodation for Oct-Dec 2019 period.

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

Seasonally Adjusted			
Occupancy Rate:	Oct-Dec2018	Oct-Dec2019	Change
Hotels	51,2	49,6	↓
Caravan parks and camping sites	29,5	28,4	↓
Guest houses and guest farms	34,9	34,2	↓
Other accommodation	48,9	50,9	↑

Seasonally Adjusted			
Occupancy Rate:	Oct-Dec2018	Oct-Dec2019	Change
Total Industry	48,3	40,8	↓

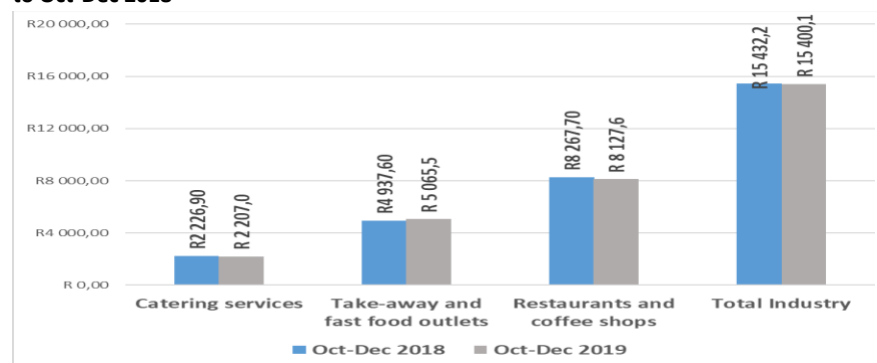
Source: Stats SA: Accommodation data cuts, February 2020

2. FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: OCT-DEC2019 COMPARED TO OCT-DEC2018

The results in Figure 2 below indicate that the total income of the food and beverages industry was about R 15 400.1 million in Oct-Dec 2019, which was an increase of 0.2% when compared to income of about R 15 432.2 million for Oct-Dec 2018. Restaurants and coffee shops contributed about 53.6% to total income during Oct-Dec 2018 and 52.8% during Oct-Dec 2019. Take-away and fast food outlets contribution was about 32.0% in Oct-Dec 2018 and 32.9% during Oct-Dec 2019. Catering services showed no significant changes, remaining almost flat in Oct-Dec 2019 (14.3%) compared to same period in 2018 (14.4%).

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



Type of food and beverage industry	% Change	Oct-Dec2018 % Share	Oct-Dec2019 % Share
Restaurants and coffee shops	-0.9%	53,6%	52,8%
Take-away and fast food outlets	2.6%	32,0%	32,9%
Catering services	-1.7%	14,4%	14,3%
Total industry	0.2%	50,1%	49,9,4%

Source: Stats SA: Food & Beverages data cuts February 2020

SECTION 3: SOUTH AFRICAN RELATED INDUSTRIES TOURISM PERFORMANCE CONT... (OCT-DEC 2019)

3. AVIATION

PASSENGER ARRIVALS MOVEMENT: OCT-DEC 2019 COMPARED TO OCT-DEC 2018

Table 6 below indicates the total passenger arrivals in Airports Company South Africa (ACSA) airports during Oct-Dec 2019 compared to Oct-Dec 2018. Total passenger arrivals increased by 2.2% moving from 5 563 747 in Oct-Dec 2018 to 5 688 763 in Oct-Dec 2019. Regional and International passenger arrivals decreased by -8.1% and -1.7% respectively, and passengers arriving on unscheduled flights had an increase of about 3.7% (557) during the period under review.

Table 6: Arriving passengers to South Africa by region Oct-Dec2019 compared to Oct-Dec18

Arriving Passengers	Oct-Dec 2018	Oct-Dec 2019	Difference	% Change
International	1 597 181	1 569 871	-27 310	-1,7%
Regional	147 820	135 860	-11 960	-8,1%
Domestic	3 803 660	3 967 389	163 729	4,3%
Unscheduled	15 086	15 643	557	3,7%
Total	5 563 747	5 688 763	125 016	2,2%

Source: ACSA data, January 2019

PASSENGER DEPARTURE MOVEMENTS: OCT-DEC 2019 COMPARED TO OCT-DEC2018

Table 7 below shows the total passengers departing from ACSA airports during the period Oct-Dec 2019 compared to Oct-Dec 2018. Total passengers departing increased by 2.2% in Oct-Dec 2019 compared to Oct-Dec 2018. International and regional passengers departing from different ACSA airports recorded a decrease in Oct-Dec 2019 compared to the same period last year while domestic passengers recorded an increase of 3.7%. Passengers departing on unscheduled flights also had a decrease of about -6.0% (-946) during the period under review.

Table 7: Departing passengers from South Africa by region: Oct-Dec 2019 compared to Oct-Dec18

Departing Passengers	Oct-Dec 2018	Oct-Dec2019	Difference	% Change
International	1 599 386	1 588 512	-10 874	-0,7%
Regional	141 705	132 706	-8 999	-6,4%
Domestic	3 809 758	3 952 126	142 368	3,7%
Unscheduled	15 797	14 851	-946	-6,0%
Total	5 566 646	5 688 195	121 549	2,2%

Source: ACSA data, January 2019

4. DIRECT TOURISM EMPLOYMENT ESTIMATES

Direct Contribution of Tourism to South Africa's employment

The data presented in this section uses Stats SA's Tourism Satellite Account 2018 preliminary tourism employment ratios to estimate direct contribution of tourism to employment for the period Oct-Dec 2019. For Oct-Dec 2019, an estimated 4.4% of South African jobs were directly created through tourism activities. Table 8 below gives data comparison between two periods: Oct-Dec 2019 and Oct-Dec 2018. The table indicates an estimated increase of 2.4% in total direct jobs created by the tourism sector, which resulted in more jobs (16 663) created between the period Oct-Dec 2019 compared to Oct-Dec 2018.

Table 8: Direct Tourism employment: Oct-Dec2019 compared to Oct-Dec2018

	2018 Q4	2019 Q4	Difference	% Growth
Tourism Employment	699 928	716 590	16 663	2,4%

Source: Calculated from the Q4 2019 Labour Force Survey data and Provisional 2018

TSA Ratios.

Share of Tourism employment by gender

Estimates of tourism employment by gender for the period Oct-Dec 2019 compared to Oct-Dec 2018 are indicated in Table 9 below. For the previous quarter, there were more males directly employed in the tourism sector than females. For Oct-Dec 2019 period, the share of women directly employed in the tourism sector declined from 37.9% to 36.4%, while the share of males increased from 62.1% to 63.6%.

Table 9: Direct Tourism employment by Gender: Oct-Dec2019 compared to Oct-Dec2018

Period	Male (% Share)	Female (% Share)
Oct-Dec2018	62,1%	37,9%
Oct-Dec2019	63,6%	36,4%

Source: Calculated from the Q4 2019 Labour Force Survey data and Provisional 2018

TSA Ratios

Table 10: Share of tourism employment by type of industry: Oct-Dec 2019

Tourism Industry	% Share
Road Passenger transport	33,9%
Food and Beverage	19,8%
Accommodation	15,2%
Retail trade	15,4%
Other industries (railway passenger transport, water passenger transport, air passenger transport, transport equipment rental, travel agencies, cultural services, sporting and other recreation services)	15,7%

The figures in Table 10 indicate that more than a third of tourism jobs for the period Oct-Dec 2019 were in the road passenger transport industry (33.9%), followed by the food and beverage industry (19.8%).

Source: Calculated from the Q4 2019 Labour Force Survey data and 2018 TSA Ratios






REFERENCES

1. Statistics South Africa, December 2019. Monthly Tourism and Migration report.
2. Statistics South Africa, OCTOBER-DECEMBER 2019. Food and Beverages data cuts.
3. Statistics South Africa, OCTOBER-DECEMBER 2019. Accommodation data cuts
4. Statistics South Africa, Quarterly Labour Force Survey, December 2019.
5. Airports Company South Africa, January 2020 data cuts.

TOP FIVE OVERSEAS SOURCE MARKETS

Country		Arrivals	
UK		130 859 4.2% up from 2018	↑
Germany		115 754 -2.6% down from 2018	↓
USA		87 537 -4.4% down from 2018	↓
France		48 303 -15.4% down from 2018	↓
Netherlands		43 244 -4.6% down from 2018	↓

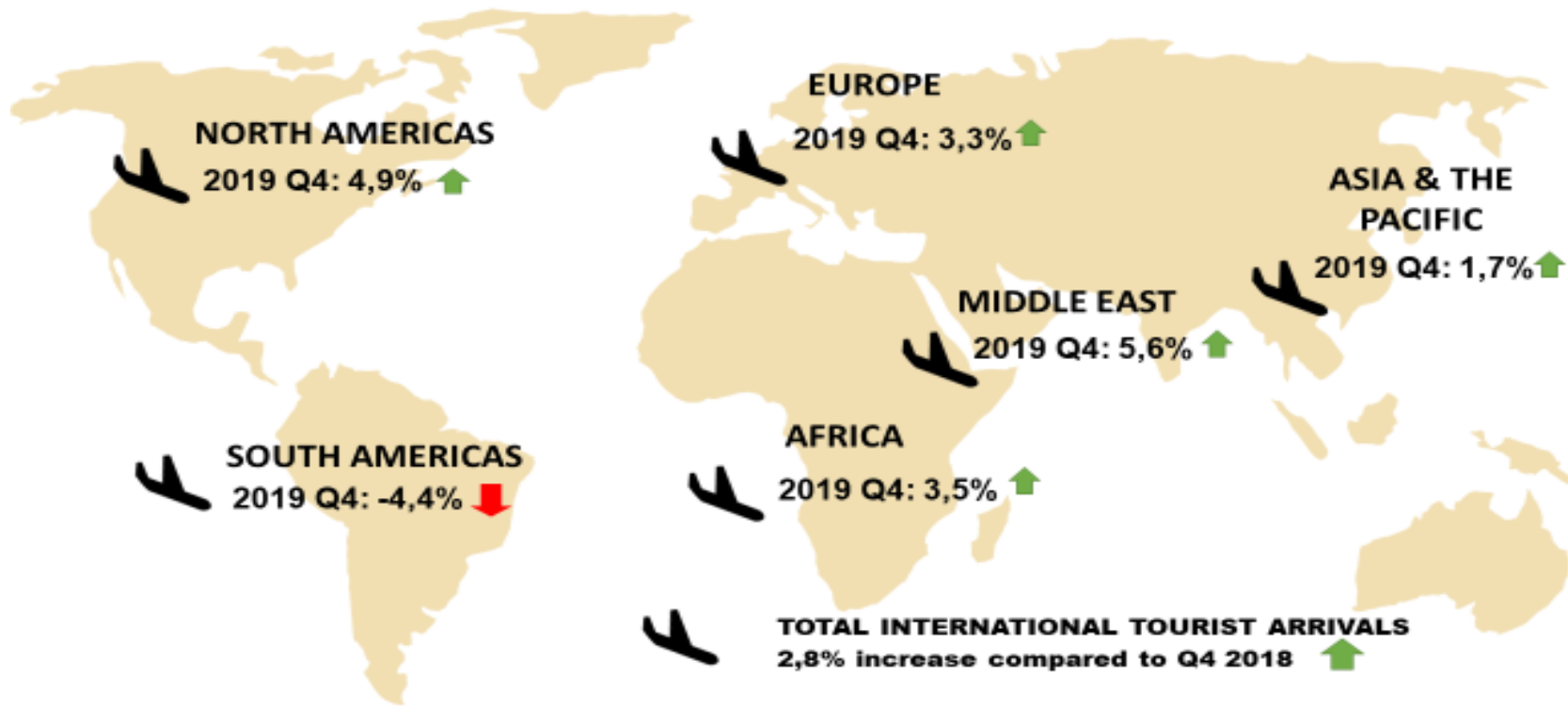
TOP FIVE AFRICA SOURCE MARKETS

Country		Arrivals	
Zimbabwe		561 608 -1.9% down from 2018	↓
Lesotho		363 004 -5.6% down from 2018	↓
Mozambique		328 291 -1.5% down from 2018	↓
Swaziland		238 646 0.7% up from 2018	↑
Botswana		194 913 -2.6% down from 2018	↓

ANNEXURE 2: GLOBAL INBOUND TOURISM PERFORMANCE: OCTOBER-DECEMBER 2019 COMPARED TO OCTOBER-DECEMBER 2018

GLOBAL INTERNATIONAL TOURIST ARRIVALS BY REGIONS

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



UNWTO has only released percentage growth by region for the quarter October-December 2019, which is compared to October-December 2018 and absolute figures have not yet been released. International tourist arrivals growth of 2.8% was recorded during Oct-Dec 2019 compared to the same period last year. Comparing Oct-Dec 2019 to Oct-Dec 2018, Middle East had the highest increase (5.6%) followed by North America (4.9%), Africa (3.5%), Europe (3.3%), and Asia & the Pacific (1.7%). South America however recorded a decline of -4.4%.