



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA





TOURISM FACTSHEET

SOUTH AFRICAN TOURISM PERFORMANCE

VOLUME 2: 2018/19

DECEMBER 2018

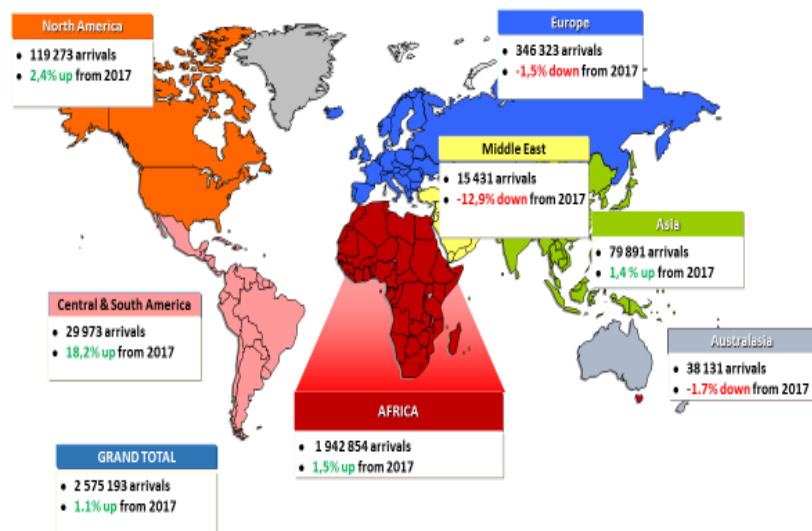
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INBOUND TOURISM PERFORMANCE

TOURIST ARRIVALS BY REGION (JUL-SEPT 2018)

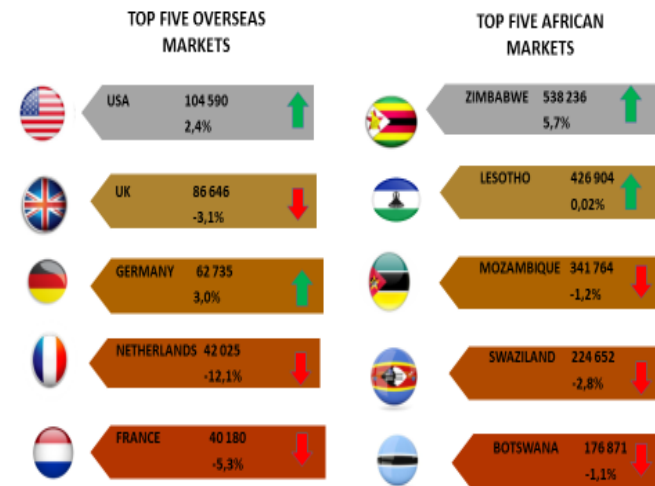
A total of 2 575 193 tourist arrivals was recorded for the period Jul-Sept 2018, which was an increase of 1.1% compared to the same period in 2017. Most regions recorded an increase in tourist arrivals during this period. Central and South America recorded the highest increase (18.2%), followed by North America (2.4%), Africa (1.5%) and Asia (1.4%). Regions that recorded a decline were Middle East (-12.9%), Australasia (-1.7%) and Europe (-1.5%).



Source: Stats SA: Tourism and Migration report: September 2018

TOP 5 OVERSEAS AND AFRICAN SOURCE MARKETS (JUL-SEPT 2018)

Most of the top five overseas source markets recorded a decline during the period Jul-Sept 2018 compared to same period in 2017. Germany and USA recorded an increase of 3.0% and 2.4% respectively. Overseas markets that recorded a decline were the Netherlands (-12.1%), France (-5.3%) and UK (-3.1%). Most of the top five African source markets also recorded a decline in tourist arrivals during the same period under review. Zimbabwe and Lesotho had an increase of 5.7% and 0.02% respectively, whilst Swaziland had the highest decline of -2.8% followed by Mozambique (-1.2%) and Botswana (-1.1%).



Source: Stats SA: Tourism and Migration report: September 2018

QUARTER TWO PERFORMANCE OF KEY INBOUND TOURISM INDICATORS (APRIL - JUNE 2018)

Information available for the following indicators is for the period April-June 2018. Information for July-September 2018 period is not yet available for reporting.

TOTAL FOREIGN DIRECT SPEND



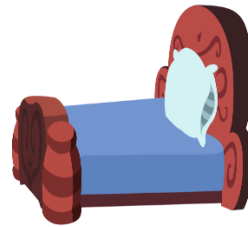
R17.9 billion
compared to **R17.6 billion** in
Quarter 2: 2017

LENGTH OF STAY



12 nights
compared to **12.5 nights** in
Quarter 2: 2017

BEDNIGHTS



27.0 million
Compared to **28.9 million** in
Quarter 2: 2017

GEOGRAPHIC SPREAD



12% Tourists visited more than
one Province compared to **14%** in
Quarter 2: 2017

Source: South African Tourism: Quarter Two Report, 2018.

QUARTER TWO PERFORMANCE OF KEY DOMESTIC TOURISM INDICATORS (APRIL–JUNE 2018)

Information available for the following indicators is for the period April-June 2018. Information for July-September 2018 period is not yet available for reporting.





DOMESTIC TRIPS Q2: 2018



4.1 million trips

-14.9% decrease from Q2: 2017

KEY DOMESTIC INDICATORS' PERFORMANCE: APRIL-JUNE 2018 COMPARE TO APRIL-JUNE 2017

LENGTH OF STAY 	3 nights compared to 3.7 in Q2:2017
BEDNIGHTS 	13.5 million compared to 17.5 million in Q2:2017
TOTAL DOMESTIC DIRECT SPEND 	R5.5 billion compared to R6.4 billion in Q2: 2017
PURPOSE OF VISIT: HOLIDAY 	0.6 million trips compared to 0.7 million trips in Q2: 2017

South African Tourism: Quarter Two Report, 2018.

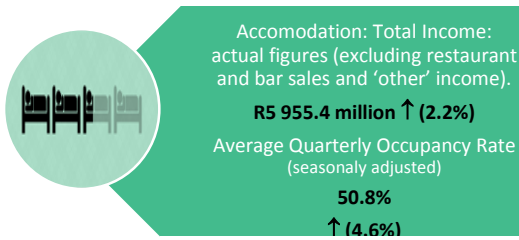
KEY RELATED TOURISM INDUSTRIES' PERFORMANCE (JUL-SEPT 2018)

Aviation Industry



For the period Jul-Sept 2018, total passenger movements recorded an increase of 1.1% compared to the same period in 2017. Both domestic and international passenger movements recorded an increase of 0.6% and 2.7% respectively for the same period.

Accommodation Industry



The accommodation industry recorded a total income of R5.955.4 million for the period Jul-Sept 2018, which was an increase of 2.2% compared to the same period of the previous year.

Food & Beverage Industry



The food and beverages industry recorded a positive growth of 1.3% on income for the period July-Sept 2018 compared to Jul-Sept 2017.

Sources: Airports Company South Africa September 2018 data; Stats SA Accommodation data cuts and Food and Beverages report: September 2018

SOUTH AFRICAN TOURISM EMPLOYMENT ESTIMATES (JUL-SEPT 2018)

For the period Jul-Sept 2018 there was an estimated total of 786 964 workers directly employed within the tourism sector. The tourism sector contributed about 4.5% to the country's total employment, which was an increase of 7.8% compared to the same period in 2017.

Total Direct Tourism Employment (Estimates)



Q3 2017	Q3 2018	Difference	% Growth
729 990	786 964	56 973	7.8%

Source: Stats SA: Quarterly Labour Force Survey Q3 Data (Jul-Sept: 2018)

NOTE: Stats SA TSA was used to calculate estimate using the 2017 tourism employment ratios

REFERENCES:

- Tourism and Migration Report, September 2018, Stats SA.
- Tourism performance highlights Q2 2018, SA Tourism.
- Food and beverages (Preliminary) September 2018, Stats SA.
- Tourist accommodation (Preliminary), September 2018, Stats SA.
- Airports Company South Africa consolidated passenger traffic September 2018, ACSA.
- Quarterly Labour Force Survey (QLFS) data cut, quarter three of 2018, Stats SA.