

# SA tourism market analyses for June 2019

By  [Martin Jansen van Vuuren](#)

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This is a monthly series of articles to provide market intelligence on the tourism industry in South Africa. It provides the latest available tourism data and historical data can be found in previous articles.



Gerrie van der Walt via [Unsplash](#)

## Arrivals

The latest available data from Statistics South Africa is for January and March 2019.

Country	Current period	Change over same period last year
UK	139 530	-4.90%
Germany	102 133	-14.10%
USA	83 185	0.90%
India	20 562	-4.00%
China	25 589	3.70%
Overseas Tourists	715 913	-6.30%
African Tourists	1 984 554	-1.80%
Total Foreign Tourists	2 704 067	-3.00%

Please note that African Tourists plus Overseas Tourists do not add to Total Foreign Tourists due to the exclusion of unspecified tourists which could not be allocated to either African or Overseas.

The latest available data from Statistics South Africa highlights the continued decline in the main source markets for foreign tourist to South Africa. The impact of Brexit on the UK market led to a decline of 4.9% during the first three months of 2019 as UK tourists either cancelled or delayed their travel plans due to the uncertainty.

There was a significant decline of 14.1% in the German market as Germans tightened their belts as the German economy declined in the third and fourth quarter of 2018.

Following tempered growth in the USA market during 2018, tourists from the US grew slightly during the first three months of 2019. It is not apparent why this market has declined with some speculating that the US market is looking at other destinations such as East Africa for their wildlife experiences.

The Indian market continues to struggle with problems in obtaining visas and limited direct flights. Some Indian tourists also delayed their travel due to the elections being held in India.

Overseas tourists declined by 6.3% during the first three months of 2019. During this period, the only overseas region that showed growth were Asia at 0.8% and North America at 1.4%. In Africa, the East and Central Africa region recorded growth of 4.0% of a low base while North Africa grew by 12.6%, also from a low base. New air connectivity provided by airlines such as Ethiopian Airways are contributing to the growth in African air arrivals to South Africa.

## Hotel statistics

The hotel statistics are supplied by [STR](#) which has analysed and reported on data from 63 000 hotels, representing 8.4 million rooms in 180 countries.

The latest available data from STR is for January to April 2019:

Current period	Average room occupancy (ARO)	Average room rate (ARR)	Revenue per Available room (RevPAR)
All Hotels in SA	61.30%	1 339	821
All 5-star hotels in SA	66.60%	2 487	1 657
All 4-star hotels in SA	63.00%	1 233	777
All 3-star hotels in SA	59.40%	981	582
Change over same period last year			
All Hotels in SA	-0.90%	1.80%	0.80%
All 5-star hotels in SA	-0.70%	0.90%	0.20%
All 4-star hotels in SA	-0.70%	1.20%	0.50%
All 3-star hotels in SA	-0.20%	2.00%	1.80%

Source: [STR](#)

The latest available data from STR shows that the decline recorded during 2018 has been slowed during the first four months of 2019. Hotels continue to suffer from the decline in foreign tourism and the pressure that the sluggish South African economy is putting on domestic tourism.

All hotels have experienced a marginal decline in their average room occupancy and a small increase in their average room rate, resulting in a small increase in revenue per available room.

## Airport arrival data

ACSA has not issued new data since the last article and the latest available data from ACSA is for January to May 2019:

Change over same period last year	Passengers arriving on International Flights	Passengers arriving on Regional Flights	Passengers arriving on Domestic Flights
OR Tambo International	-1.00%	3.30%	4.30%
Cape Town International	3.00%	-1.10%	1.30%
King Shaka International	6.00%	-15.60%	5.40%

Please note that passengers arriving on international flights may be South African's returning from an international trip. Similarly, passengers arriving on a domestic flight might be foreign tourists travelling on a domestic airline between domestic destinations.

Passengers arriving on international flights to Cape Town International and King Shaka International have been boosted by additional flights to these airports, while the decline by OR Tambo International is reflective of the decline in foreign tourism.

The continued growth in passengers arriving on domestic flights to all three airports are encouraging and indicates that the domestic tourism industry is still travelling although it might be mainly business tourists rather than leisure tourists.

## Conclusion

The data for the first four to five months of 2019 continues the declining trend of 2018. There are, however, encouraging signs for domestic tourism as indicated by the ACSA data.

As stated in previous articles, in my humble opinion, growth in foreign tourism will be sedated for the next couple of months while Brexit are being sorted and growth in the source market economies slowly recover. I do not believe we should be expecting much, if any, growth in foreign tourism from our key source markets. I am hopeful that the economy will begin its slow recovery after the elections and that domestic tourism will track this recovery.

## ABOUT MARTIN JANSEN VAN VUUREN

Martin Jansen van Vuuren is co-founder and director of I and M Futureneer Advisors Pty Ltd. He is a number cruncher, provider of market intelligence, strategist, economist, futureneer and advisor.

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