

# SOUTHERN AFRICA TRAVEL AND TOURISM BAROMETER REPORT

## 2014



VOL 1



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## **1. Introduction**

Due to resource constraints, RETOSA has introduced this short version of our Annual Tourism Statistics Report. While brief and to the point, we however hope the report provides the basic regional tourism statistical information that our stakeholders demand.

The tourism statistical information provided in this report is mostly historical and covers the period up to December 2013.

We hope all our readers will find this presentation useful. The publication is free to all our members and to order your copy please contact us at [research@retosa.co.za](mailto:research@retosa.co.za)

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## 2. Tourism Trends: Global

### 2.1. Global Tourist Arrivals and % Market Share by Region

**Table 1:** Global Tourist Arrivals (millions) and Market Share (%) by Region 1990-2013

Region	1990		2000		2010		2012		2013	
	(mil)	%	(mil)	%	(mil)	%	(mil)	%	(mil)	%
<b>Europe</b>	265	60.4	386.4	57.4	488.6	51.5	539.1	52	566.3	52.1
<b>Asia&amp; Pacific</b>	56.0	12.8	110.1	16.4	204.9	21.6	233.5	22.5	249.8	23.0
<b>Americas</b>	93.0	21.2	128.2	19	150.6	15.9	162.7	15.7	168.1	15.5
<b>Africa</b>	15.0	3.4	26.2	3.9	49.9	5.3	53.0	5.1	54.7	5.0
<b>Middle East</b>	10.0	2.3	22.4	3.3	54.5	5.7	49.0	4.7	48.2	4.4
<b>Global</b>	<b>439</b>	<b>100</b>	<b>673.3</b>	<b>100</b>	<b>948.5</b>	<b>100</b>	<b>1,037.3</b>	<b>100</b>	<b>1087.1</b>	<b>100</b>

Source: UNWTO World Travel and Tourism Barometer 2014, vol 12, Dec

**Table 2:** Southern Africa Tourist Arrivals (millions) and Market Share (%) Globally and in Africa 1990-2013

Year	World Arrivals (mil)	Africa Tourist Arrivals (mil)	Southern Africa Tourist Arrivals (mil)	Southern Africa (World) Market Share (%)	Southern Africa (Africa ) Market Share (%)
<b>1990</b>	439.0	15.1	2.6	0.5	17.2
<b>2000</b>	673.3	26.2	16.0	2.4	61.1
<b>2010</b>	948.5	49.9	20.3	2.1	40.7
<b>2012</b>	1037.3	53.0	22.4	2.2	42.2
<b>2013</b>	1087.1	55.9	23.3	2.1	41.7

Source: Member States and UNWTO World Travel and Tourism Barometer 2014, vol 12, Dec

According to the UNWTO, International tourist arrivals grew by 5% in 2013. International tourism results were above expectations with an additional 52 million tourists travelling the world in 2013 (UNWTO, 2014). Increase in international tourism was strongest from: Asia and the Pacific (+6%), Africa (+6%) and Europe (+5%). The leading sub-regions were South East Asia

(+10%), Central and Eastern Europe (+7%), Southern and Mediterranean Europe (+6%), and North America (+6%) (UNWTO, 2014).

## 2.2. Global Tourist Receipts and % Market Share by Region

**Table 3:** Global Tourist Receipts (\$US millions) and % Market Share by Region

Region	1990		2000		2010		2012		2013	
	(mil)	%	(mil)	%	(mil)	%	(mil)	%	(mil)	%
Europe	201.7	47.6	231.7	48.7	411.2	42.5	454.1	40.7	491.2	41.0
Asia& Pacific	77.1	18.2	85.3	17.9	255.9	26.5	329.0	29.5	359.8	30.1
Americas	122	28.7	131.4	27.6	215.0	22.2	249.1	22.3	264.4	22.1
Africa	9.0	2.1	10.3	2.1	30.4	3.1	34.4	3.1	35.2	2.9
Middle East	13.7	3.2	16.8	3.5	54.5	5.6	49.0	4.4	46.4	3.9
<b>Global</b>	<b>423.0</b>	<b>100</b>	<b>475.0</b>	<b>100</b>	<b>967</b>	<b>100</b>	<b>1115.6</b>	<b>100</b>	<b>1197</b>	<b>100</b>

Source: Member States and UNWTO World Travel and Tourism Barometer 2014, vol 12, Dec

**Table 4:** Southern Africa Tourism Receipts (US\$ millions) and (%) Market Share Globally and in Africa (%) 1990-2013

Year	World Tourist Receipts (mil)	Africa Tourist Receipts (mil)	Southern Africa Tourist Receipts (mil)	Southern Africa (World) Market Share (%)	Southern Africa (Africa) Market Share (%)
1990	264.0	6.4	2.7	1.0	42.1
2000	475.0	10.3	4.6	0.97	44.7
2010	967.0	30.4	15.3	1.6	50.3
2012	1115.6	34.3	16.5	1.5	48.1
2013	1197	34.7	16.3	1.4	47.0

Source: Member States and UNWTO World Travel and Tourism Barometer, vol 12, Dec

Overall tourism receipts increased by 5% in 2013 to reach a total of \$US1, 4 trillion. With marginal increase of approximately 0.8% in overall tourism receipts

between 2012 and 2013, Africa continues to enjoy the least market share of global tourism receipts. The Middle East has experienced a 0.6% decline in overall tourism receipts whilst Europe (+8%), Asia and Pacific (+9%) and the Americas (+6%) have seen increases in the overall tourism receipts (UNWTO, 2014).

## 2.3. Air Transport by Region

**Table 5:** Passenger Air Transport World Wide by Region, 2013

Region	Total Number of Departing and Arriving Passengers(mil)	Market share of International Travellers by Region (%)	Market Share of Domestic Travellers by Region (%)
<b>Total</b>	<b>3, 104</b>	<b>100</b>	<b>100</b>
North America	815	35.0	65.0
Africa	73	86.3	13.7
Latin America &Caribbean	230	48.3	51.7
Europe	817	88.1	11.8
Asia &Pacific	1,008	55.5	44.5
Middle East	161	94.4	5.6
<b>INTERNATIONAL</b>		-	-
North America	285	-	-
Latin America& Caribbean	111	-	-
Europe	720	-	-
Asia and Pacific	559	-	-
Middle East	152	-	-
Africa	63	-	-
<b>DOMESTIC</b>		-	-
North America	530	-	-
Latin America &Caribbean	119	-	-
Europe	97	-	-
Asia & Pacific	449	-	-
Middle East	9	-	-
Africa	10	-	-

**Source: International Civil Aviation Organisation (ICAO) 2014**

The overall number of passengers carried rose to 3.1 billion in 2013, which is a 4.5 percent increase over 2012, whilst the number of departures reached 32 million globally in 2013, a 1.2 % increase compared to 2012 (ICAO,2014) . Africa experienced a growth of 3.5% in terms of passengers carried increasing to 73 million in 2013(ICAO, 2014).

It is interesting to note that Africa has the third lowest domestic travel market share, with domestic travel accounting for only 13.7% of overall air travel in the region. This is a reflection of the impacts of critical factors like accessibility to and within each region.

## 2.4. Hotel Performance by Region

**Table 6:** Hotel Performance by Region, 2013

Region	Occupancy%	ADR	Rev PAR
Americas	61.7	112(US\$)	69(US\$)
Europe	64.7	101(Euro)	66(Euro)
Asia & Pacific	66.3	122(US\$)	81(US\$)
Africa and Middle East	63.9	164(US\$)	105(US\$)

Source: UNWTO World Tourism Barometer 2014, vol 12, Dec

\*Africa and the Middle East are bundled together.

\*ADR=Average Daily Room Rate

\*Rev PAR= Revenue per available room



## 2.5. International Tourism Expenditure (US\$ Billions)

**Table 7:** Top 50 Tourist Spending Markets (US\$ Billions) 2000, 2010 and 2012, 2013

Rank 2012	International Tourism Expenditure (US\$ billions)			
	2000	2010	2012	2013
<b>World</b>	<b>475</b>	<b>930</b>	<b>1075</b>	<b>1195</b>
<b>1 China</b>	13.1	54.9	102.0	128.6
<b>2 United States</b>	65.8	86.6	100.3	104.7
<b>3 Germany</b>	53.0	78.1	81.3	91.4
<b>4 Russian Federation</b>	8.8	26.7	42.8	53.5
<b>5 United Kingdom</b>	38.4	50.0	51.3	52.6
<b>6 France</b>	22.6	38.5	40.0	42.9
<b>7 Canada</b>	12.4	29.7	35.0	35.2
<b>8 Australia</b>	6.4	22.5	28.0	28.4
<b>9 Italy</b>	15.7	27.1	26.4	27.0
<b>10 Brazil</b>	3.9	16.4	22.2	25.1
<b>11 Singapore</b>	4.5	18.7	23.6	24.6
<b>12 Japan</b>	31.9	27.9	27.9	21.8
<b>13 Korea, Republic of</b>	7.1	18.8	20.6	21.7
<b>14 Belgium</b>	9.4	18.9	20.2	21.7
<b>15 Hong Kong (China)</b>	12.5	17.4	20.1	21.2
<b>16 Netherlands</b>	12.2	19.6	20.2	20.5
<b>17 Norway</b>	4.6	13.5	16.5	18.4
<b>18 Untd Arab Emirates</b>	3.0	11.8	15.1	17.7
<b>19 Saudi Arabia</b>	....	21.1	17.0	17.7
<b>20 Sweden</b>	8.0	13.1	15.8	17.6
<b>21 Spain</b>	6.0	16.8	15.3	16.3
<b>22 Switzerland</b>	5.4	11.2	13.8	14.9
<b>23 Taiwan (pr. Of China)</b>	8.1	9.4	10.6	12.3
<b>24 Malaysia</b>	2.1	8.3	12.2	12.2
<b>25 India</b>	2.7	10.5	12.3	11.6
<b>26 Kuwait</b>	2.5	6.4	9.0	10.4
<b>27 Austria</b>	6.3	10.2	10.1	10.3
<b>28 Denmark</b>	4.7	9.0	9.6	10.2
<b>29 Mexico</b>	5.5	7.3	8.4	9.1
<b>30 Poland</b>	3.3	8.6	8.7	8.7

<b>31 Indonesia</b>	3.2	6.4	6.8	7.7
<b>32 Thailand</b>	2.8	5.6	6.2	6.7
<b>33 Qatar</b>	0.3	0.5	5.6	6.6
<b>34 Iran</b>	0.7	9.7	6.6	...
<b>35 Philippines</b>	1.6	3.4	6.5	6.5
<b>36 Ireland</b>	2.5	7.1	5.9	6.2
<b>37 Nigeria</b>	0.6	5.6	6.2	5.9
<b>38 Ukraine</b>	0.5	3.7	5.1	5.8
<b>39 Argentina</b>	4.4	4.9	5.9	5.6
<b>40 Finland</b>	1.9	4.3	4.9	5.3
<b>41 Turkey</b>	1.7	5.2	4.1	4.8
<b>42 Czech Rep</b>	1.3	4.1	4.3	4.6
<b>43 Lebanon</b>	...	4.9	4.2	...
<b>44 Portugal</b>	2.2	3.9	3.8	4.1
<b>45 Israel</b>	2.8	3.7	3.8	4.0
<b>46 Colombia</b>	1.1	2.6	3.6	3.9
<b>47 New Zealand</b>	1.2	3.0	3.7	3.9
<b>48 Luxembourg</b>	1.3	3.6	3.6	3.8
<b>49 South Africa</b>	2.1	5.6	4.1	3.4
<b>50 Egypt</b>	1.1	2.2	2.6	3.0

Source: UNWTO World Travel and Tourism Barometer 2014, vol 12, Dec

### 3. Southern Africa against Other Developing Regions of the World

**Table 8:** Southern Africa against Other Developing Regions of the World 2013

Region	Arrivals		Receipts	
	(million)	%	(US\$ billions)	%
<b>South East Asia</b>	94.3	46.2	107.8	<i>43.0</i>
<b>Oceania</b>	12.5	6.1	42.8	<i>17.0</i>
<b>South Asia</b>	16.1	7.9	24.5	<i>9.8</i>
<b>Central America</b>	9.1	4.5	9.3	<i>3.7</i>
<b>Caribbean</b>	21.2	10.4	25.3	<i>10.1</i>
<b>South America</b>	27.5	13.5	24.9	<i>9.9</i>
<b>Southern Africa</b>	23.3	11.4	16.3	<i>6.5</i>
<b>TOTAL</b>	<b>204.0</b>	<b>100.0</b>	<b>250.9</b>	<b>100.0</b>

Source: Member States and UNWTO World Tourism Barometer 2014, vol 12, Dec

## 4. Tourism Trends: Southern Africa

### 4.1 Tourist Arrivals and % Market Share

**Table 9:** RETOSA Member States Tourist Arrivals and % Market share of total Arrivals into Southern Africa, 2000-2013

Country	2000	%	2010	%	2012	%	2013	%
Angola	51,000	0.4	430,000	2.1	512,000*	2.3	650,000	2.8
Botswana	1,104,000	8.8	2,145,000	7.9	2,039,000*	9.0	2,012,000*	8.6
DRC	103,000	0.8	81,000	2.7	198,000*	0.8	191,000	0.8
Lesotho	302,000	2.4	414,000	2.1	423,000	1.9	432,966	1.9
Malawi	228,000	1.8	746,000	3.8	816,000*	3.6	856,800	3.7
Mauritius	656,000	5.2	935,000	4.6	965,000	4.3	993,106	4.3
Mozambique	55,000	0.4	1,718,000	9.0	2,205,000	9.8	1,969,000	8.5
Namibia	861,000	6.8	984,099	4.9	1,078,937	4.9	1,176,042	5.1
Seychelles	130,000	1.0	175,000	0.9	208,000	0.9	230,272	1.0
South Africa	5,872,000	46.8	8,074,000	41.0	9,188,000	41	9,617,000	41.3
Swaziland	281,000	2.2	868,000	6.5	1,279,000	5.7	1,299,000	5.6
Tanzania	501,699	3.7	782,699	3.8	1,077,058	4.6	1,095,884	4.7
Zambia	457,000	3.6	815,000	4.0	726,000	3.2	914,576	3.9
Zimbabwe	1,967,000	15.7	2,239,000	10.9	1,794,000	8.0	1,833,000	7.9
<b>SADC(million)</b>	<b>12.600</b>	<b>100</b>	<b>20.000</b>	<b>100</b>	<b>22.408</b>	<b>100</b>	<b>23.271</b>	<b>100</b>

Source: Member States and UNWTO World Travel Barometer 2014, vol 12, Dec

\*Estimated figures based on 5% UNWTO projected growth rate

## 4.2 Tourism Receipts and %Market Share

**Table 10:** RETOSA Member States Tourism Receipts (millions) and % Market Share of Total Tourism Receipts of Southern Africa, 2000-2013

Country	2000		2010		2012		2013	
	(mil)	%	(mil)	%	(mil)	%	(mil)	%
Angola	143	2.9	719	4.7	658*	3.9	1 170	7.2
Botswana	222	4.5	223	1.5	235*	1.4	246.8*	1.5
DRC	-	0.0	11	0.1	7	0.0	7.35*	0.0
Lesotho	24	0.5	32	0.2	602	3.6	37.8*	0.2
Malawi	25	0.5	34	0.2	36*	0.2	37.8*	0.2
Mauritius	542	10.9	1 488	9.7	1 477	8.8	1 350	8.3
Mozambique	74	1.5	231	1.5	250	1.5	236.2	1.5
Namibia	160	3.2	517	3.4	485	2.9	409	2.5
Seychelles	139	2.8	291	1.9	310	1.9	343.6	2.1
South Africa	2 675	53.8	9 547	62.4	9 994	59.8	9 537	58.6
Swaziland	37	0.7	46	0.3	48*	0.3	31.5*	0.2
Tanzania	739	14.9	1 353	8.8	1 713	10.2	1 854	11.4
Zambia	67	1.3	146	1.0	154*	0.9	161.7*	1.0
Zimbabwe	125	2.5	662	4.3	749	4.5	851	5.2
<b>SADC(million)</b>	<b>4.972</b>	<b>100</b>	<b>15.300</b>	<b>100</b>	<b>16.718</b>	<b>100</b>	<b>16.274</b>	<b>100</b>

Source: Member States and UNWTO World Travel Barometer 2014, vol 12, Dec

\*Estimated figures based on UNWTO 5% projected growth rate

### 4.3 Tourism Expenditure

**Table 11:** RETOSA Member States Tourism Expenditures, 2005-2013

Country	2005	2008	2009	2010	2012	2013
Angola	135	447	270	-	-	-
Botswana	301	490	-	-	-	-
D R C	-	-	-	-	-	-
Lesotho	36	19	22	-	-	-
Malawi	75	-	-	-	-	-
Mauritius	295	489	384	-	-	-
Mozambique	187	241	249	241	158	-
Namibia	123	92	-	-	-	-
Seychelles	-	-	-	-	-	-
South Africa	8,620	9,178	8,683	-	-	-
Swaziland	60	59	98	-	-	-
Tanzania	-	-	-	-	-	-
Zambia	88	107	83	-	-	-
Zimbabwe	-	-	-	5,330	-	-

Source: Member States

Tourism Expenditures measures the amount spent by Member States nationals when visiting abroad. This figure is important in determining the BOP contribution of tourism to the region. There are significant gaps in table11 due to economic constraints and limited statistical capacity in the different Member States to collect the information required.

#### 4.4 Tourism Departures

**Table 12:** RETOSA Member States Tourist Departures 2013

Country	2005	2008	2010	2012	2013
<b>Angola</b>	-	-	-	-	-
<b>Botswana</b>	1,024	1005	1,045	-	-
<b>D R C</b>	-	-	-	-	-
<b>Lesotho</b>	-	-	-	-	-
<b>Malawi</b>	-	-	-	-	-
<b>Mauritius</b>	183	226	196	-	-
<b>Mozambique</b>	-	-	-	2,101	-
<b>Namibia</b>	254	290	296	-	-
<b>Seychelles</b>	-	-	-	-	-
<b>South Africa</b>	8,920,258	12,904,062	15,073,447	16,524,601	18,365,779
<b>Swaziland</b>	1,082,000	1,177,000	1,245,000	1,402,000	1,445,286
<b>Tanzania</b>	-	-	-	-	-
<b>Zambia</b>	445	722	558	-	-
<b>Zimbabwe</b>	474	593	631	-	-

**Source: Member States**

Information pertaining to where citizens from RETOSA Member States travel to is important for the establishment of strategies to grow and develop intra-regional tourism. Again due to economic constraints and limited statistical capacity limited information was collected from Member States.

## 4.5 Accommodation

**Table 13:** RETOSA Member States Number of Rooms Available in 2013

Country	No of Rooms
Angola	20 842
Botswana	8362
D R C	-
Lesotho	2,627
Malawi	-
Mauritius	12, 376
Mozambique	22,339
Namibia	129,798
Seychelles	1,156,752
South Africa	115,700
Swaziland	592,102
Tanzania	-
Zambia	-
Zimbabwe	6427

Source: Member States

**Table 14:** RETOSA Member States Room Occupancy Rate (%) in 2013

Country	%
Angola	86.0
Botswana	47.1
D R C	-
Lesotho	-
Malawi	-
Mauritius	63.0
Mozambique	25.6
Namibia	40.0
Seychelles	65.0
South Africa	58.9
Swaziland	46.8
Tanzania	-
Zambia	-
Zimbabwe	48.0

Source: Member States



**Table 15:** RETOSA Member States Number of beds available in 2013

Country	No of Beds
Angola	28 227
Botswana	-
D R C	15,804
Lesotho	5,004
Malawi	-
Mauritius	25,105
Mozambique	45,403
Namibia	254,032
Seychelles	2,368,599
South Africa	-
Swaziland	1,062,183
Tanzania	-
Zambia	-
Zimbabwe	12,081

Source: Member States

**Table 16:** RETOSA Member States Bed Occupancy Rate (%) 2013

Country	%
Angola	79.0
Botswana	38.6
D R C	-
Lesotho	21.6
Malawi	-
Mauritius	55.0
Mozambique	-
Namibia	37.0
Seychelles	64.0
South Africa	-
Swaziland	35.2
Tanzania	-
Zambia	-
Zimbabwe	37.0

Source: Member States

#### 4.6 Average Length of Stay in RETOSA Member States

**Table 17:** RETOSA Member States Average Length of Stay (days) 2013

COUNTRY	No. of DAYS
Angola	3
Botswana	-
DR Congo	-
Lesotho	12
Malawi	-
Mauritius	11
Mozambique	7
Namibia	-
Seychelles	10
South Africa	9
Swaziland	1
Tanzania	-
Zambia	-
Zimbabwe	4

Source: Member States

#### 4.7 Tourism Employment in RETOSA Member States

**Table 18:** RETOSA Member States Tourism Employment 2013

Country	Direct Employment
Angola	63,500
Botswana	25,000
D R C	122,500
Lesotho	25,000
Malawi	135,500
Mauritius	28,419
Mozambique	45,350
Namibia	24,000
Seychelles	9,700
South Africa	617,287
Swaziland	5,600
Tanzania	402,500
Zambia	23,300
Zimbabwe	43,500

Source: World Travel and Tourism Council 2014

#### 4.8 Socio Economic indicators from RETOSA Member States

**Table 19:** RETOSA Member States Socio Economic Indicators, 2013

Country	Pop. (US mil)	% of Total SADC Pop.	GDP (US\$ bil)	% of Total SADC GDP	GDP per capita US\$	Tourism Receipts (US\$ mil)	Tourism Receipts as % of GDP	Exports (US\$ bil)
Angola	18.6	6.5	115.253	17.6	6 204	1 170	1.0	71,949
Botswana	2.1	0.7	14.447	2.2	7 003	246.8*	1.7	6,470
D R C	73.4	25.9	18.795	2.9	256	7.35*	0.04	10,109
Lesotho	1.9	0.7	2.450	0.4	1287	37.8*	1.5	1,024
Malawi	14.8	5.2	5.653	0.9	381	37.8*	0.7	1,582
Mauritius	1.3	0.5	11.497	1.8	8905	1 350	11.7	6,294
Mozambique	23.7	8.4	15.100	2.3	637	236.2	1.6	4,243
Namibia	2.1	0.8	12.823	2.0	6003	409	3.2	5,458
Seychelles	0.09	0.0	1.033	0.2	11 701	343.6	33.3	1,089
South Africa	51.2	18.1	384.780	58.7	7509	9 537	2.4	108,727
Swaziland	1.1	0.4	4.017	0.6	3719	31.5*	0.8	2,136
Tanzania	44.9	15.8	28.101	4.3	625	1 854	6.6	8,241
Zambia	14.1	5.0	21.511	3.3	1521	161.7*	0.6	9,368
Zimbabwe	13.0	4.6	11.551	1.5	755	851	7.4	4,200
<b>SADC</b>		<b>100</b>	<b>647.0</b>	<b>100</b>		<b>16.3</b>		<b>240.890</b>

Source: Member States

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