

FOREIGN MARKET SHARE

STATISTICS ON INBOUND INTERNATIONAL TOURISM



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WHAT IS FOREIGN MARKET SHARE?

- **Foreign Market** = Total number of international tourist arriving from another country



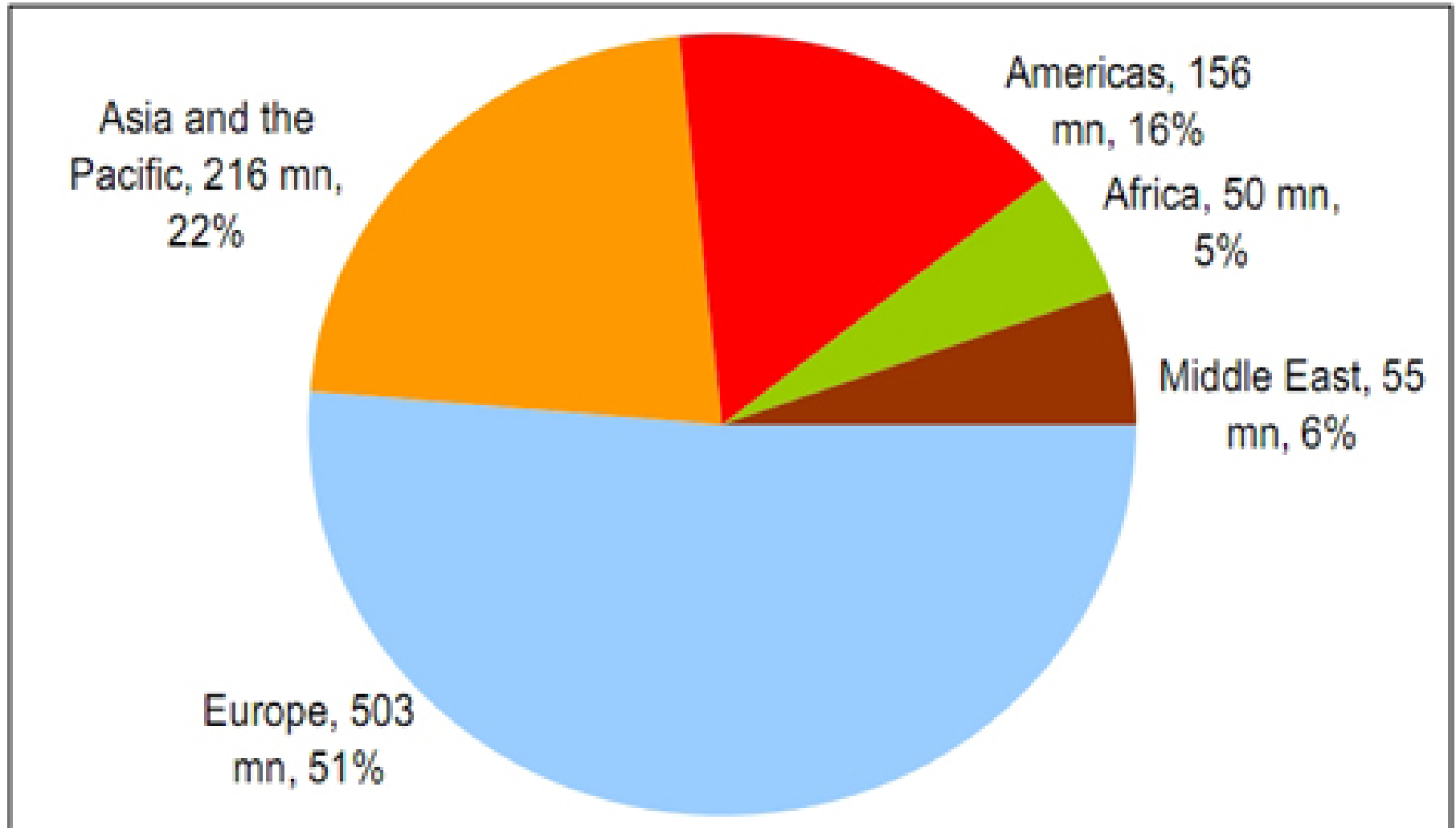
WHAT IS FOREIGN MARKET SHARE?

- **Foreign Market Share = Total number of international tourist arriving in South Africa**



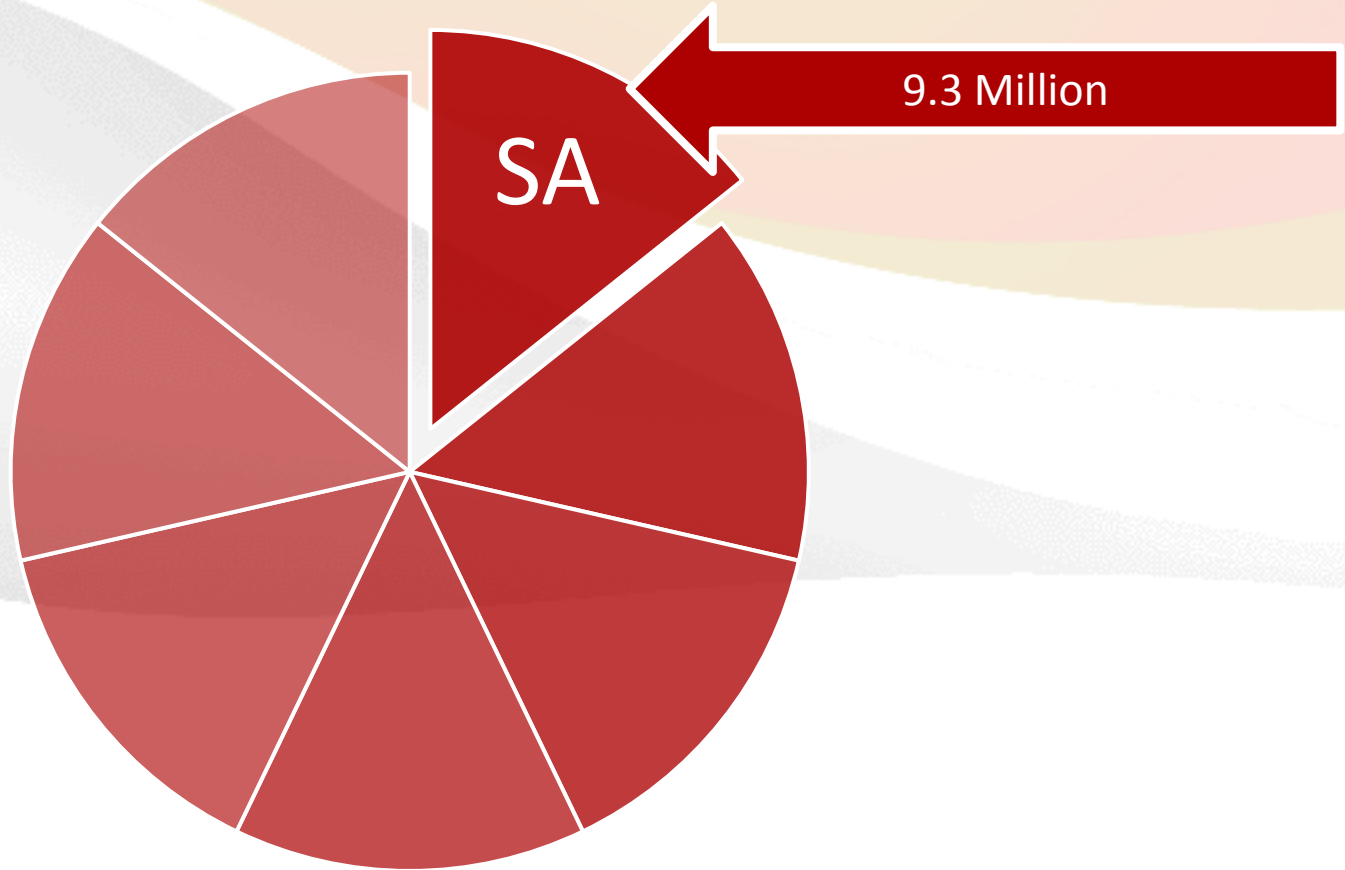
Total Tourism Market

World Inbound Tourism: International Tourist Arrivals, 2011* (million)



Source: World Tourism Organization (UNWTO) ©

SOUTH AFRICA'S FOREIGN MARKET SHARE



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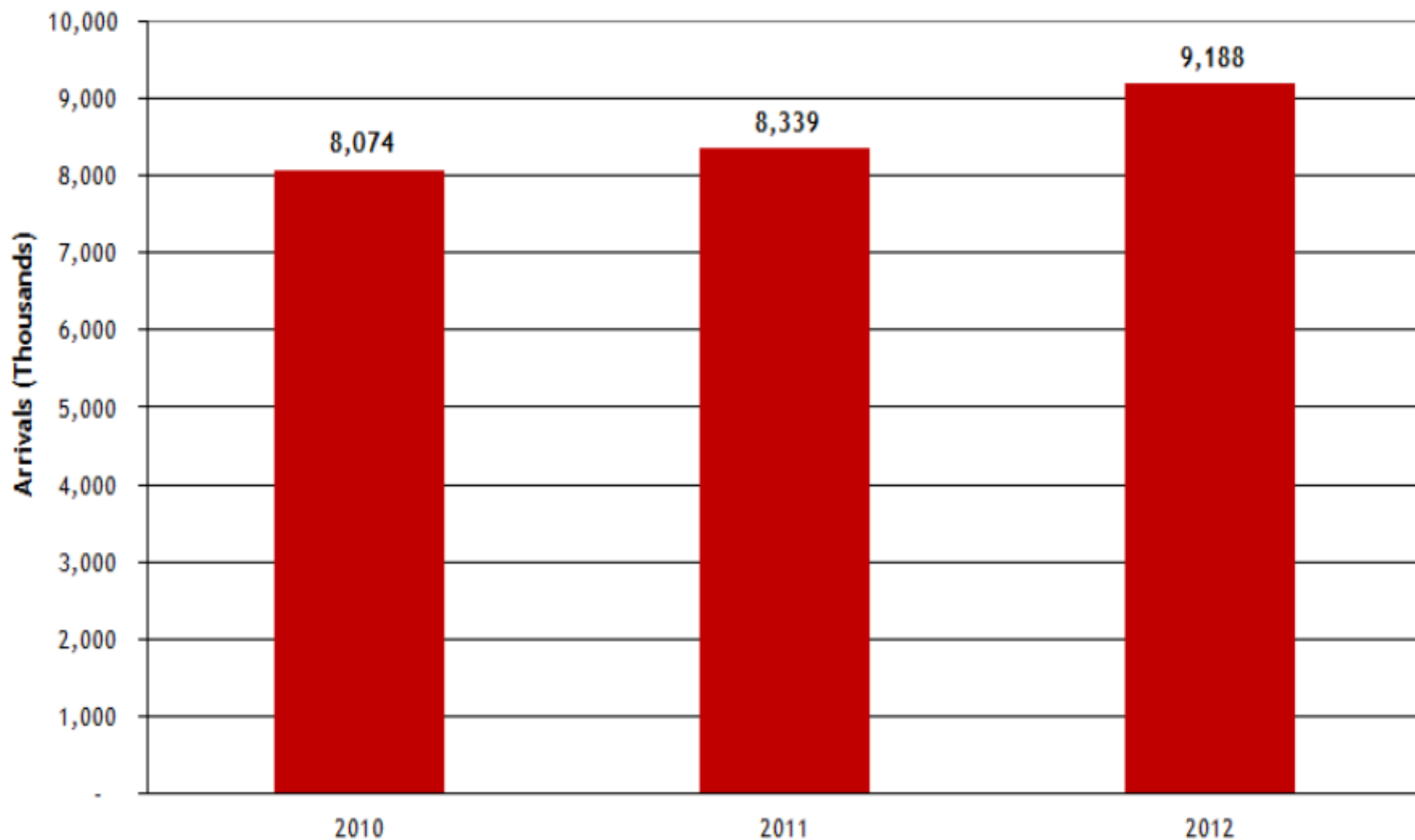
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TOURIST ARRIVALS

Total Tourists Arrivals to South Africa: 2010 - 2012

CAGR
2011 - 2012: 10.2%



- Worldwide, international tourist arrivals grew by **3.9%** in 2012 to reach **1,1 billion**. France remained the top international destination with an impressive **83 million** visitors in 2012, a growth of **0.9%** from 2011.



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2012 GLOBAL RANKINGS – TOP 5

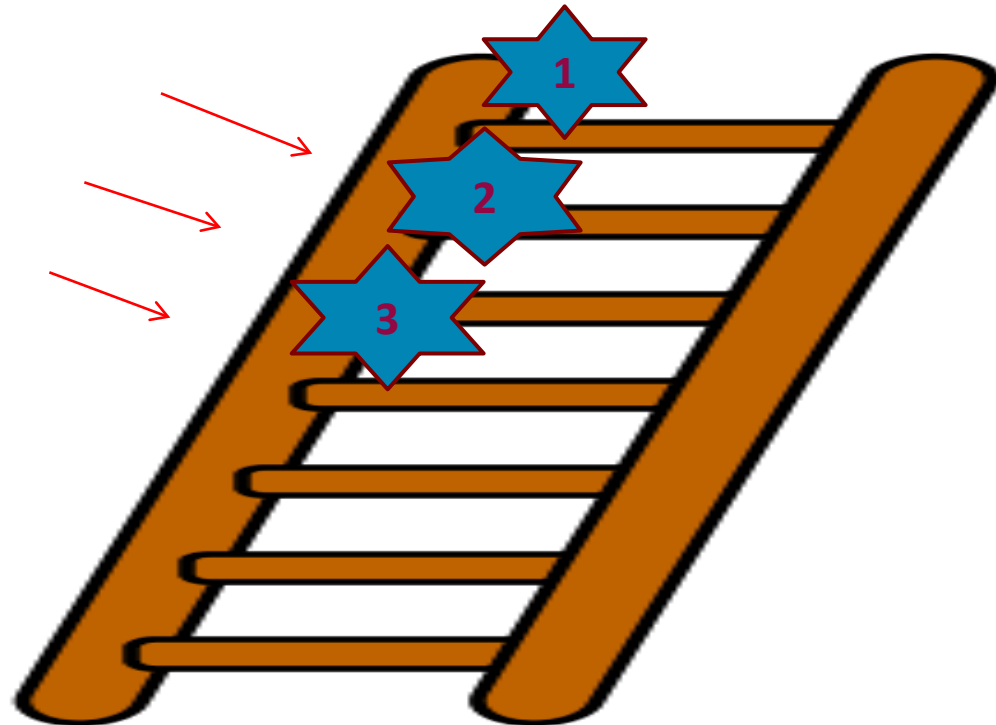
FRANCE

USA

SPAIN

CHINA

ITALY



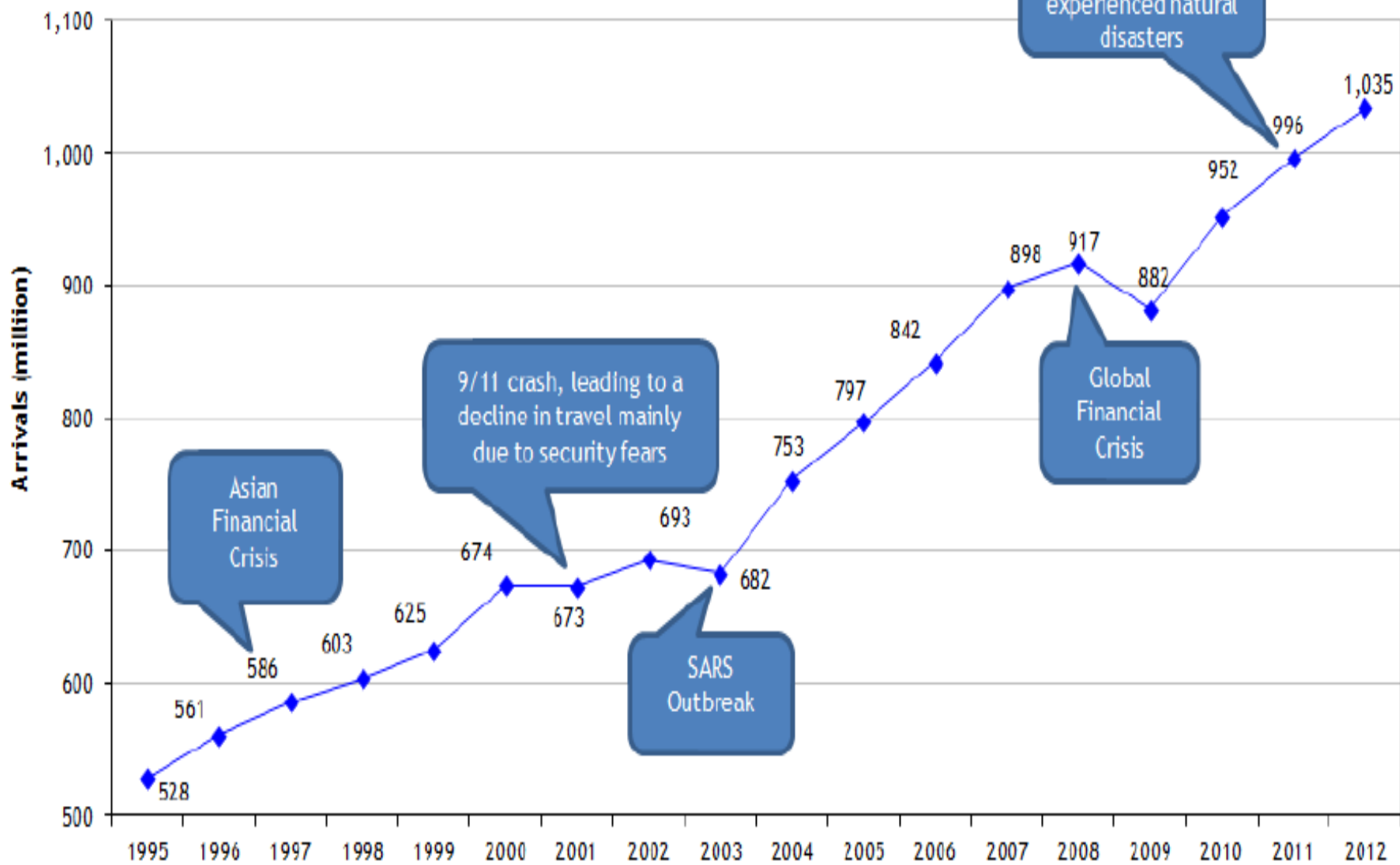
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THE AFRICAN PICTURE



International Arrivals: 1995 - 2012



- Foreign tourist arrivals to South Africa grew by **10.2% (849,014)** in 2012 to reach **9,188,368** million tourists.
- This performance is far above the global average which saw a **3.9%** increase in tourist arrivals.

2012 Annual Tourism Report_v1_07062013



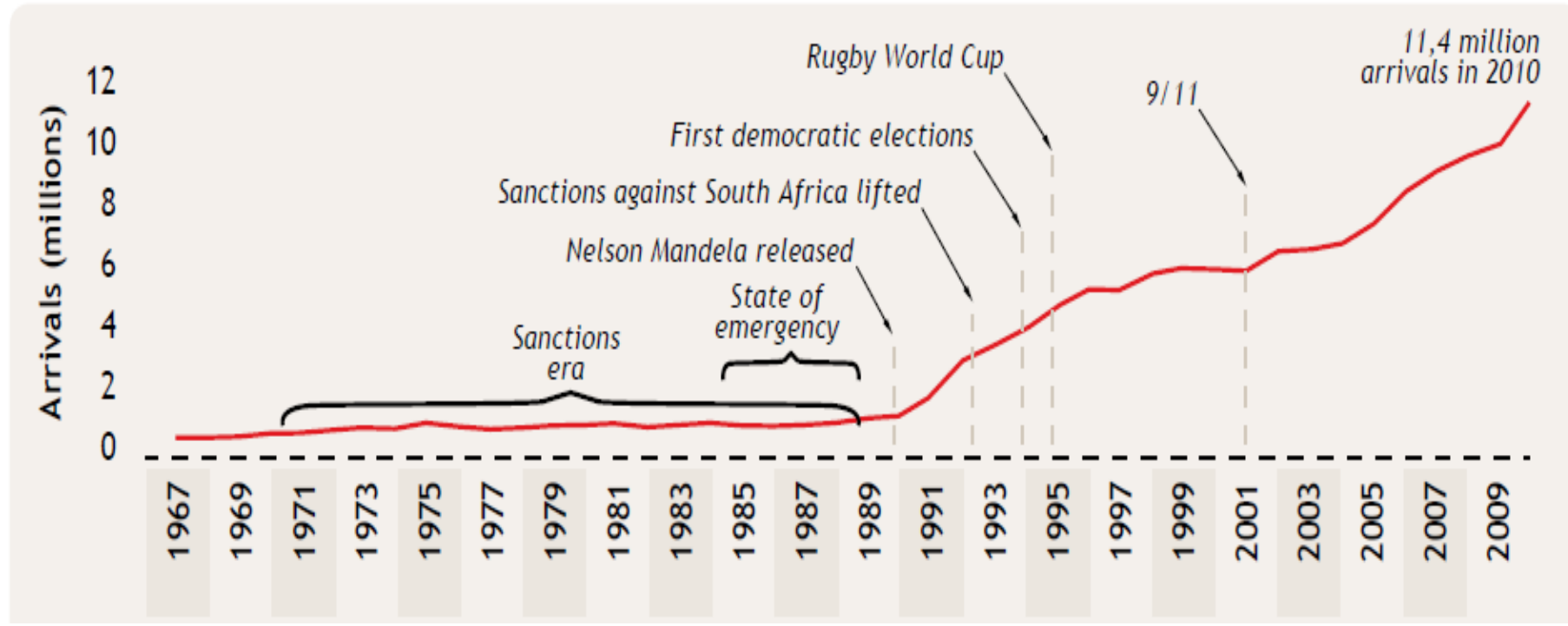
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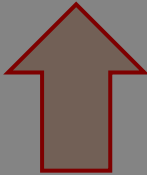


Foreign arrivals to South Africa, 1967 to 2010

Arrivals to South Africa continue their upward climb, reaching 11,4 million arrivals in 2010



FOREIGN ARRIVALS

SOURCE MARKETS

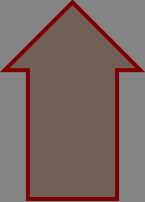
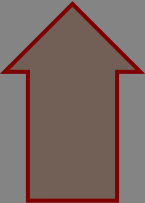
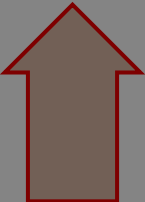
TOTAL TOURIST ARRIVALS	9,188,368	 10.2%
AFRICA LAND MARKETS	6,303,945	 8.2%
AFRICA AIR MARKETS	406,685	 14.2%



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ARRIVALS CONT.

AMERICAS	513,359	 18.6%
ASIA & AUSTRALIA	541,253	 28.7%
EUROPE	1,396,978	 9.5%



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AFRICA LAND MARKETS

Land markets: Those countries where at least 60% of arrivals from the country arrive by **land**.

Zimbabwe, Lesotho, Mozambique, Swaziland, Botswana



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AFRICA AIR MARKETS

Those countries where at least 60% of arrivals from the country arrive by **air**
e.g. **Nigeria, Angola and Tanzania.**



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GRAPH INTERPRETATION

Read any other information

Heading

Length of stay

Y-Axis

1

0

X-Axis

Months



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Heading

South Africa's Market Share by country

Key

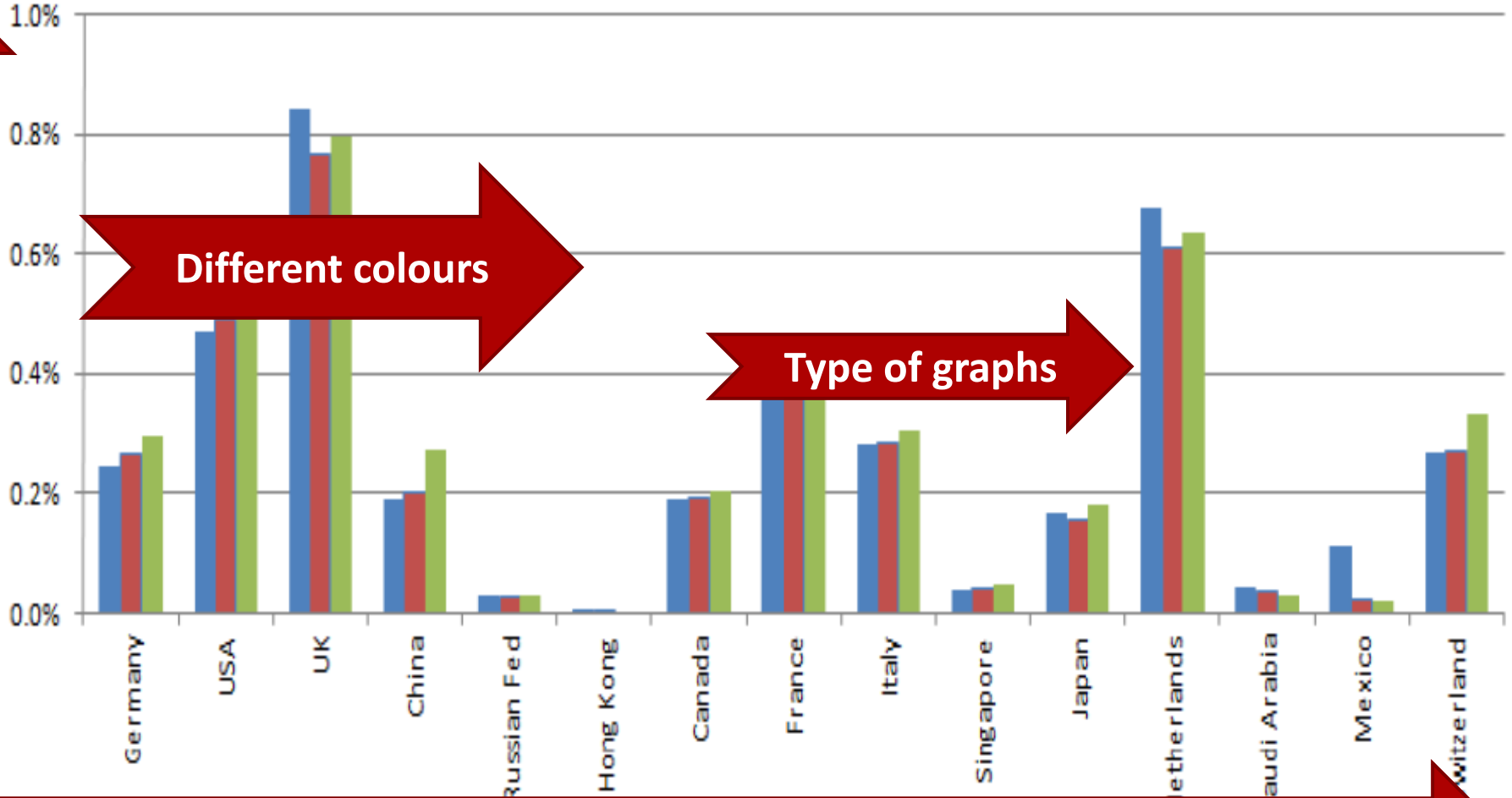
Market share - 10 Market share - 11 Market share - 12

Different colours

Type of graphs

Percentages

Countries



Source: © Euromonitor International 2012 and SA Tourism Table A December 2012

Note: * China excluding Hong Kong

Activity

Study the graph titled **South Africa's Market Share By Country**

- Write a paragraph to explain your observations



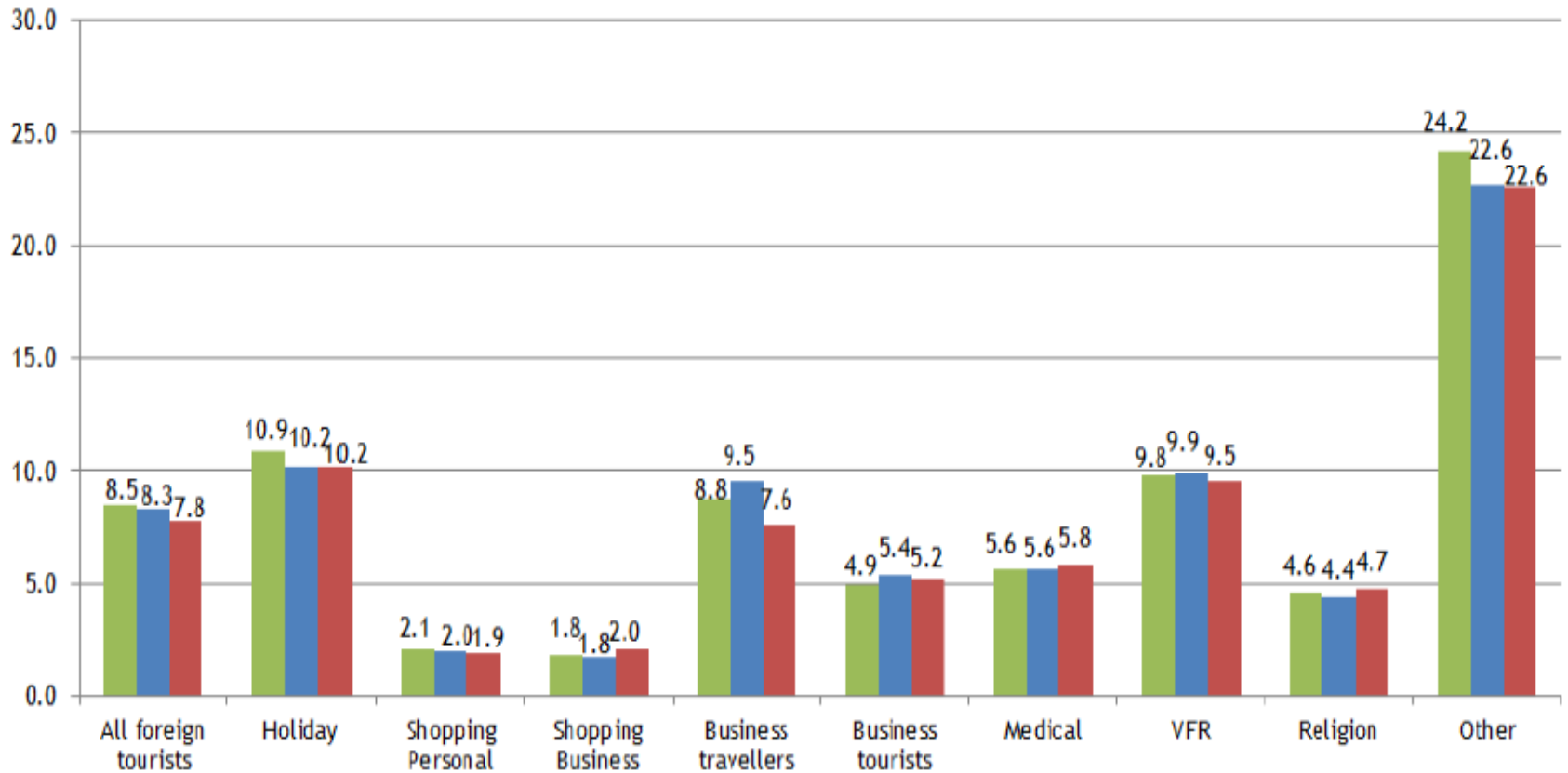
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Average Length of stay

■ 2010 ■ 2011 ■ 2012



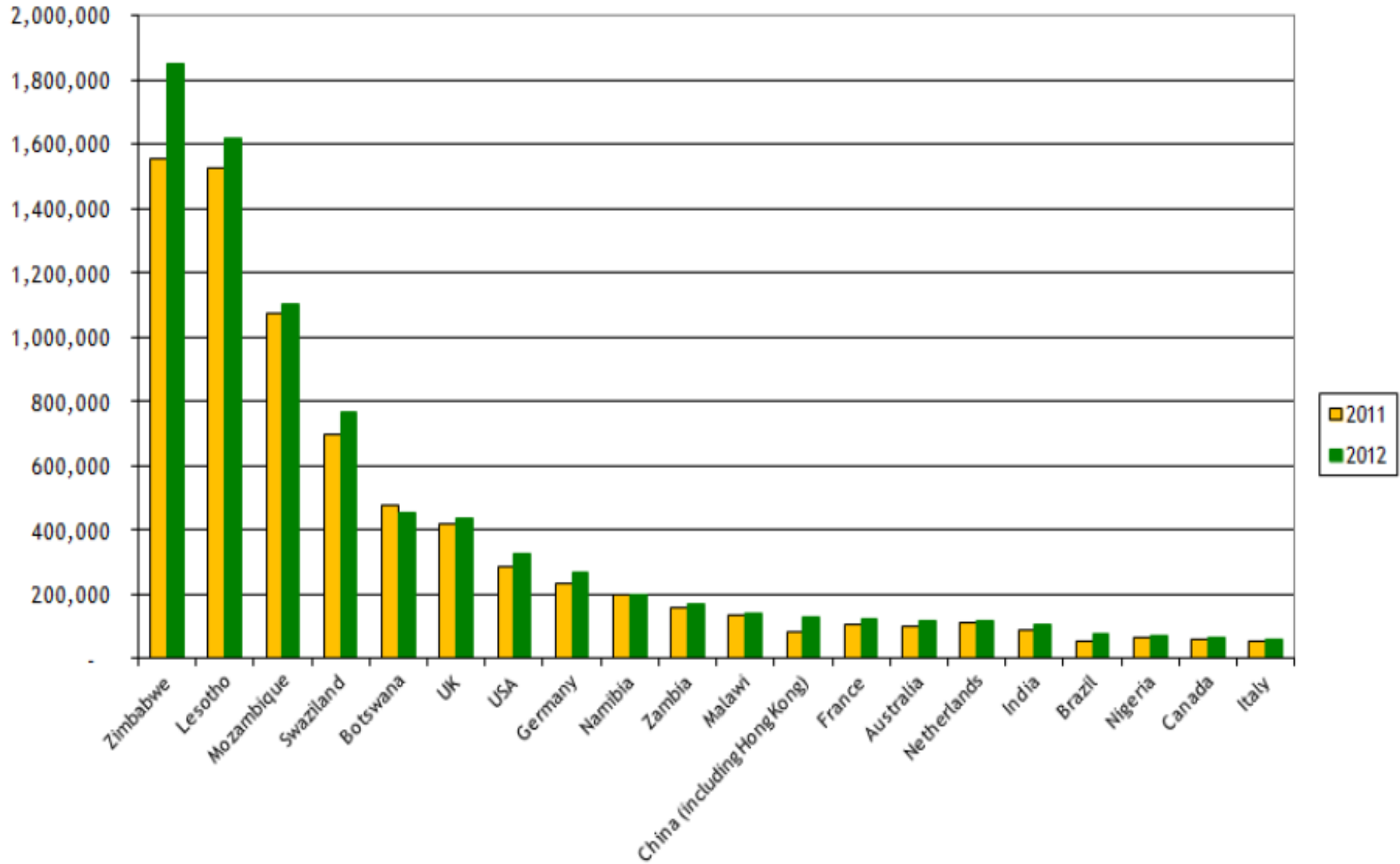
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SOURCE MARKETS-ARRIVALS

Top 20 Source Markets



Activity

1. Identify South Africa's biggest source market.
2. Suggest a reason for this phenomenon
3. List , in descending order, the top three source markets outside Africa



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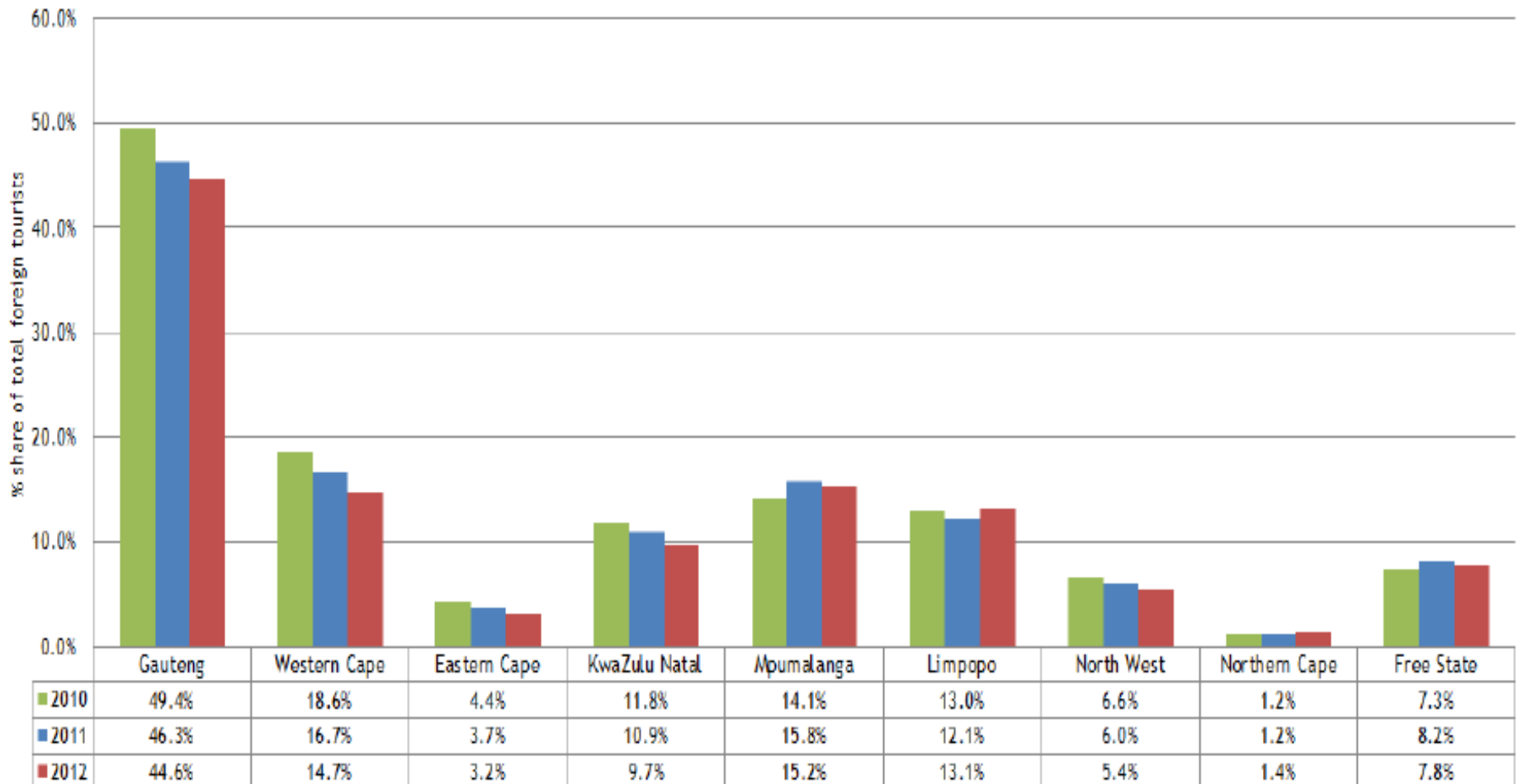
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MOST VISITED PROVINCES IN SA

Study the graph below. List five observations from the graph.

Provincial distribution - Share of foreign tourists



OBSERVATIONS

- Gauteng remained the most visited province with 44.6% of tourist arrivals visiting the province.
- Despite being the most visited province in 2012, the percentage of foreign tourists to Gauteng has declined by approximately two percentage points.



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- Mpumalanga moved to second most visited province
- Western Cape slipped to the third place with
- The Limpopo and the Northern Cape were the only provinces which shows an increase in the percentage of tourist arrivals.



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LENGTH OF STAY-PROVINCES

PROVINCE	AVERAGE LENGTH OF STAY
LIMPOPO	13
WESTERN CAPE	12.9
KWAZULU-NATAL	10.1
EASTERN CAPE	9.2
GAUTENG	9.1
NORTHERN CAPE	7.3
FREE STATE	6.9
MPUMALANGA	5.5
NORTH WEST	2.3

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PER DAY EXPENDITURE: 2011 vs. 2012

	2011	2012
Average spend in SA per foreign tourist per day	R1,080	R1,130
Land Markets	R1,640	R1,280
Air Markets	R630	R970



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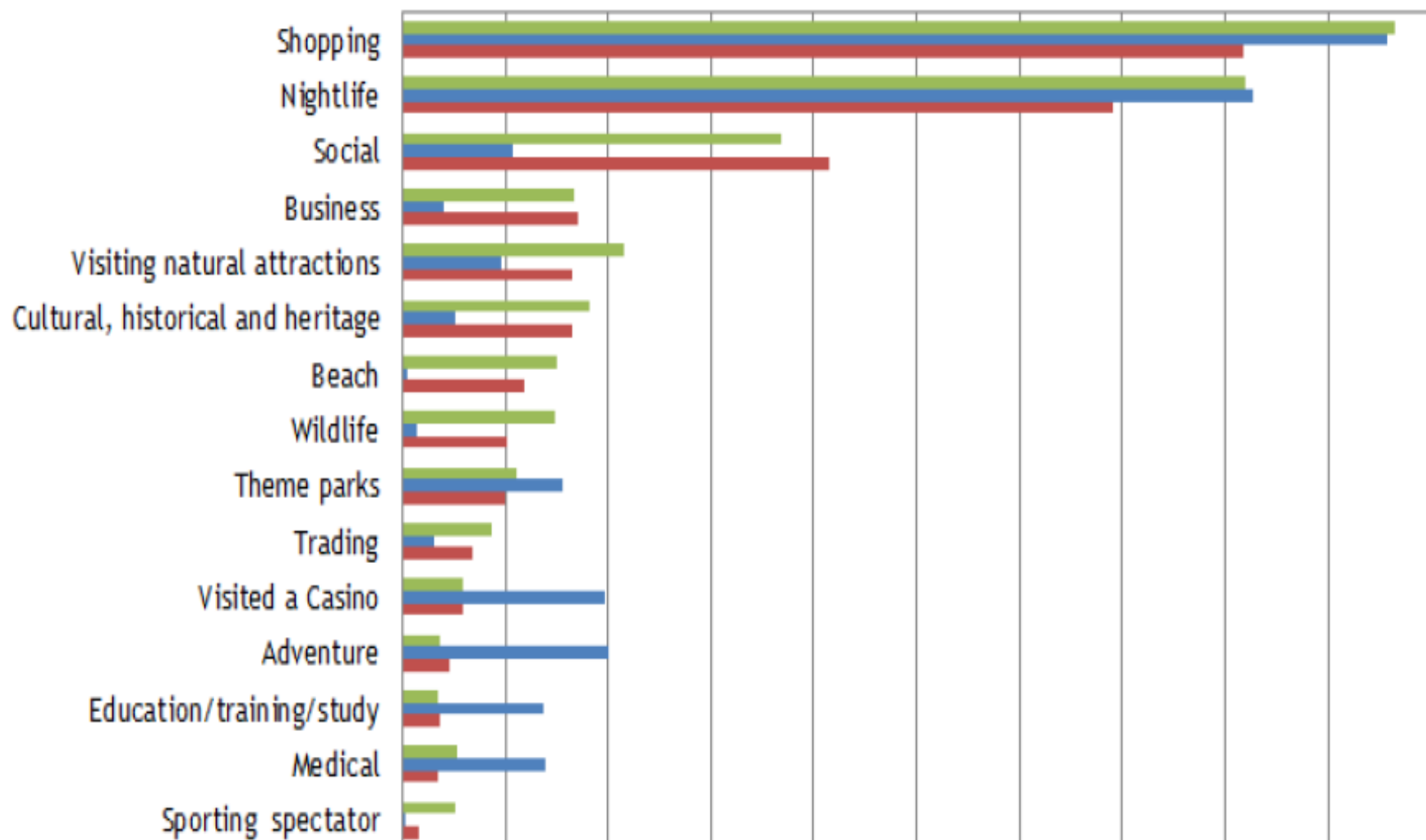
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Activities undertaken while in South Africa

■ 2010 ■ 2011 ■ 2012

.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0% 80.0% 90.0% 100.0%



ACTIVITY

- Refer to the table below based on the Percentage Distribution of Tourists from overseas countries on business, 2011.

COUNTRY OF ORIGIN	% DISTRIBUTION
UK	20.1
USA	10.3
GERMANY	9.3
INDIA	9.0
CHINA	6.7
FRANCE	4.6
NETHERLANDS	4.2
AUSTRALIA	2.6
OTHER	33.3



ACTIVITY CONT.

1. Determine which category of countries have contributed to the highest overall business trips to SA in 2011?
2. State which country has been ranked the lowest in their business arrivals to SA in 2011?
3. Provide a possible reason as to why Australia's figures are down in comparison to the UK and USA in 2011.



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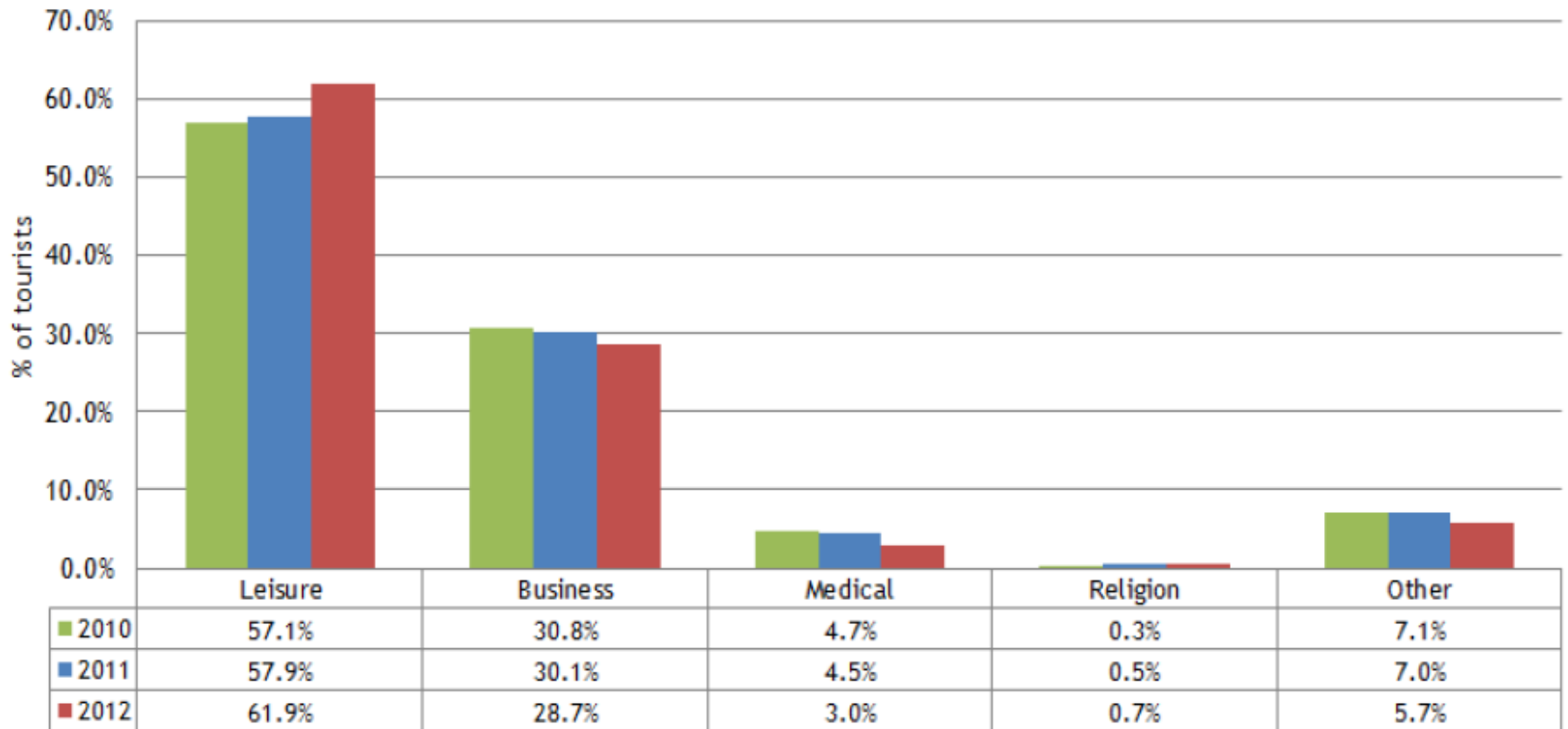
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ACTIVITY

Refer to the graph below and complete the activity that follows.

Purpose of visit for all foreign tourists



Note: Leisure includes holiday, VFR and shopping-personal goods; Business includes shopping - business goods, business travellers and business tourists.

CONT.

1. With reference to the graph depicted on purpose of visit to South Africa for foreign tourists, formulate THREE questions on different cognitive levels



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Teaching Tips - Methodology

- Explain key concepts such as **inbound tourists/ foreign market share/ core markets/ source markets/ tourist arrivals/ emerging markets**
- Teach learners the skill to analyse /interpret graph.
- Teach background content to assist learners to interpret graphs
- Teach in context – link to real life value
- Use relevant recent statistics

THANK YOU
Cheryl Weston



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