

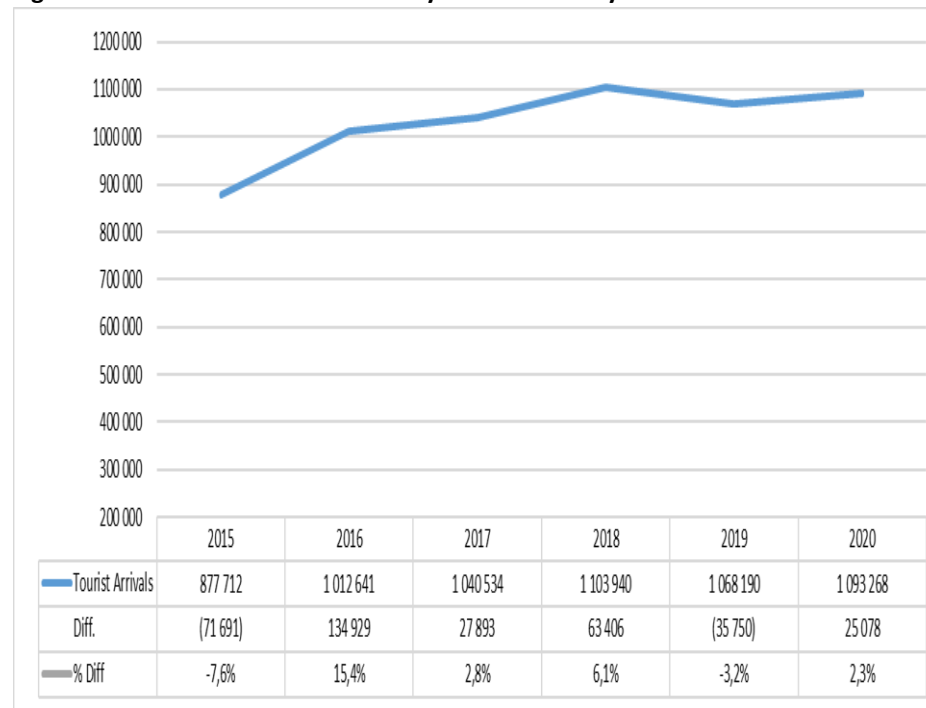
SUMMARY ANALYSIS OF TOURIST ARRIVALS: JANUARY 2020

TREND ANALYSIS: JANUARY 2015 - JANUARY 2020

A total of 1 093 268 tourist arrivals was recorded in January 2020, which was an increase of 2.3% (25 078) compared to the same month in 2019.

Figure 1 indicates tourist arrivals for January 2015 to January 2020 period. Tourist arrivals increased from 877 712 in 2015 to 1 012 641 in 2016, which was an increase of 15.4% (134 929). Tourist arrivals increased from 1 012 641 in 2016 to 1 040 534 in 2017, which was a growth of 2.8% (27 893). Tourist arrivals increased by 6.1% (63 406) in January 2018 compared to the same month in 2017. Comparing January 2019 with January 2018, there was a decrease of -3.2% (-35 750) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals January 2015 to January 2020



Source: Stats SA Tourism and Migration report, January 2020

JANUARY 2020 COMPARED TO JANUARY 2019 BY REGION

Table 1 indicates tourist arrivals by region for January 2020 compared to the same month in 2019. Arrivals from overseas markets went up by 4.2%. All overseas regions recorded a growth with the Middle East recording a double-digit growth of 46.9%, followed by Central and South America (5.1%), North America (4.9%), Europe (3.9%) and Asia (1.3%). The increase from the Middle East was influenced by Saudi Arabia with a growth of 322.0% (1 465) in tourist arrivals during January 2020. Most European markets had an increase in tourist arrivals, with Russian Federation recording the highest increase of 33.3% (631). With regards to volume, the United Kingdom had the highest increase of 2 803 tourist arrivals. Australasia was the only overseas region which recorded a decline of -2.9% (-283) in tourist arrivals in January 2020 compared to January 2019. The decline in Australasia was influenced by Australia, with a decline of -9.3% (-838) during the period under review.

Africa recorded an increase of 1.8% (15 297) and this region remained the main source of tourist arrivals to the country, accounting for 77.7% (849 698) of total tourist arrivals during January 2020.

Table 1: Total Tourist Arrivals by Region: January 2020 vs. January 2019

| Region | JANUARY 2020 | JANUARY 2019 | Diff | % Diff. |
|-------------------------|--------------|--------------|--------|---------|
| EUROPE | 157 808 | 151 933 | 5 875 | 3,9% |
| NORTH AMERICA | 31 594 | 30 120 | 1 474 | 4,9% |
| CENTRAL & SOUTH AMERICA | 12 567 | 11 961 | 606 | 5,1% |
| AUSTRALASIA | 9 584 | 9 867 | -283 | -2,9% |
| MIDDLE EAST | 5 234 | 3 562 | 1 672 | 46,9% |
| ASIA | 25 763 | 25 429 | 334 | 1,3% |
| TOTAL OVERSEAS | 242 550 | 232 872 | 9 678 | 4,2% |
| AFRICA | 849 698 | 834 401 | 15 297 | 1,8% |
| Unspecified | 1 020 | 917 | 103 | 11,2% |
| GRAND TOTAL | 1 093 268 | 1 068 190 | 25 078 | 2,3% |

Source: Stats SA Tourism and Migration Report, January 2020

Table 3 gives the rankings of the top ten African source markets for January 2020 compared to January 2019. Majority of the top ten African source markets remained at the same position for the period under review except for Tanzania, which moved up from 11th position in 2019 to 10th position in 2020, replacing Nigeria. Most of the top ten countries showed an increase except for Angola (-25.0%), Zambia (-6.1%) and Mozambique with -0.5% growth. Botswana recorded the highest growth (11.1%) followed by Tanzania (8.3%), Malawi (7.8%), Swaziland (6.8%), Lesotho (4.7%), Namibia (0.4%) and Zimbabwe (0.2%). In terms of volume, Lesotho's growth got translated to an additional 9 275 tourist arrivals from this country during January 2020.

Table 3: South Africa's Top 10 African Source Markets: Jan 2020 vs. Jan 2019

| Country | Rank-2020 | Tourist Arrivals 2020 | Rank-2019 | Tourist Arrivals 2019 | % Change from 2019 to 2020 |
|------------|-----------|-----------------------|-----------|-----------------------|----------------------------|
| Zimbabwe | 1 | 291 982 | 1 | 291 293 | 0,2% |
| Lesotho | 2 | 204 791 | 2 | 195 516 | 4,7% |
| Mozambique | 3 | 161 574 | 3 | 162 393 | -0,5% |
| Swaziland | 4 | 74 370 | 4 | 69 643 | 6,8% |
| Botswana | 5 | 44 122 | 5 | 39 709 | 11,1% |
| Malawi | 6 | 18 766 | 6 | 17 415 | 7,8% |
| Namibia | 7 | 14 545 | 7 | 14 483 | 0,4% |
| Zambia | 8 | 12 256 | 8 | 13 056 | -6,1% |
| Angola | 9 | 6 270 | 9 | 8 355 | -25,0% |
| Tanzania | 10 | 3 273 | 11 | 3 021 | 8,3% |

Source: Stats SA Tourism and Migration Report, January 2020.

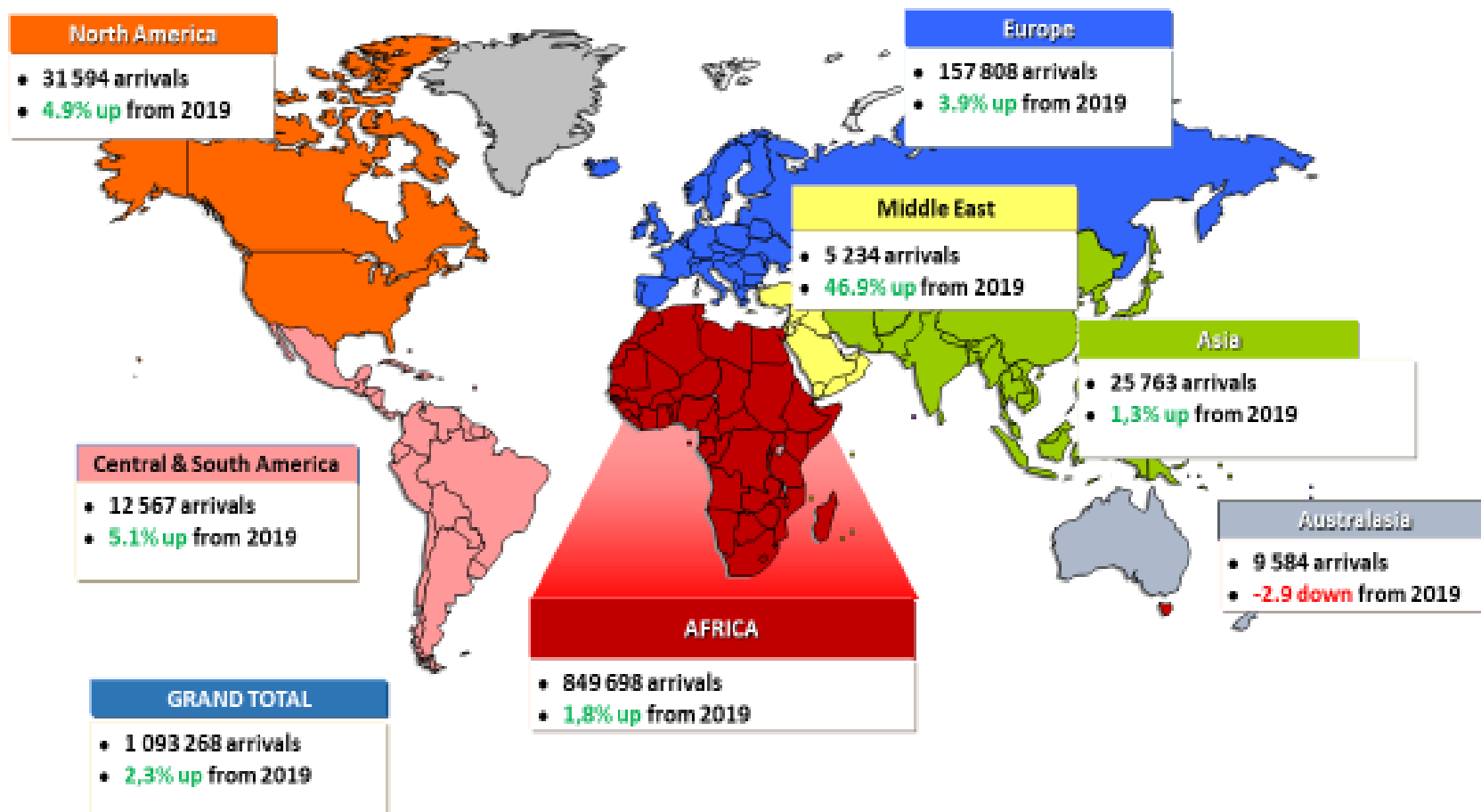
Table 4 shows the rankings of the top ten overseas source markets. Comparing January 2020 with January 2019, most of the top 10 overseas markets had an increase in tourist arrivals except for Australia (-9.3%), France (-8.0%) and the Netherlands (-0.9%). Most of the top ten overseas markets changed positions by moving up in 2020 from lower positions in 2019. These overseas markets include the Netherlands, which moved up from 5th position in 2019 to 4th position in 2020, China improved its 7th position in 2019 to 6th position in 2020, Brazil moved to 7th position in 2020 from 9th position in 2019. Canada also improved its 11th position in 2019 by moving up to 10th position in 2020, removing Sweden in the top ten list of overseas markets. Some markets lost their key positions, including France, plummeting from 4th position in 2019 to 5th position in 2020, Australia from 6th position in 2019 to 8th position in 2020 and India moved from 8th position in 2019 to 9th position in 2020. UK remained the main source market from overseas, recording a growth of 6.0%.

Table 4: South Africa's Top 10 Overseas Source Markets: Jan 2020 vs. Jan 2019

| Country | Rank-2020 | Tourist Arrivals 2020 | Rank-2019 | Tourist Arrivals 2019 | % Change from 2019 to 2020 |
|-----------------|-----------|-----------------------|-----------|-----------------------|----------------------------|
| UK | 1 | 49 436 | 1 | 46 633 | 6,0% |
| Germany | 2 | 35 067 | 2 | 31 501 | 11,3% |
| USA | 3 | 25 664 | 3 | 24 193 | 6,1% |
| The Netherlands | 4 | 12 776 | 5 | 12 888 | -0,9% |
| France | 5 | 12 509 | 4 | 13 595 | -8,0% |
| China | 6 | 8 799 | 7 | 7 962 | 10,5% |
| Brazil | 7 | 8 540 | 9 | 6 523 | 30,9% |
| Australia | 8 | 8 142 | 6 | 8 980 | -9,3% |
| India | 9 | 7 452 | 8 | 6 900 | 8,0% |
| Canada | 10 | 5 930 | 11 | 5 927 | 0,1% |






Source: Stats SA Tourism and Migration Report, January 2020.

ANNEXURE 1: TOTAL TOURIST ARRIVALS BY REGION JANUARY 2020 COMPARED TO JANUARY 2019








ANNEXURE 2: TOTAL TOURIST ARRIVALS FOR TOP TEN OVERSEAS AND AFRICA MARKETS: JANUARY 2020 COMPARED TO JANUARY 2019

**TOP FIVE OVERSEAS
SOURCE MARKETS**

| Country | | Arrivals | |
|-------------|--|-----------------------------------|---|
| UK |  | 49 436 6.0% up from 2019 | ↑ |
| Germany |  | 35 067 11.3% up from 2019 | ↑ |
| USA |  | 25 664 6.1% up from 2019 | ↑ |
| Netherlands |  | 12 776 -0.9% down from 2019 | ↓ |
| France |  | 12 509 -8.0% down from 2019 | ↓ |

**TOP FIVE AFRICA
SOURCE MARKETS**

| Country | | Arrivals | |
|------------|--|------------------------------------|---|
| Zimbabwe |  | 291 982 0.2% up from 2019 | ↑ |
| Lesotho |  | 204 791 4.7% up from 2019 | ↑ |
| Mozambique |  | 161 574 -0.5% down from 2019 | ↓ |
| Swaziland |  | 74 370 6.8% up from 2019 | ↑ |
| Botswana |  | 44 122 11.1% up from 2019 | ↑ |

ANNEXURE 3: ESTIMATES OF PASSENGER MOVEMENTS AND BOOKINGS FROM FORWARDKEYS

The Department of Tourism has subscribed with ForwardKeys to monitor bookings of air passengers in order to estimate the number of air arrivals to the country. Estimates do not include land markets as trends from these markets tend to follow a different pattern. The analysis from ForwardKeys provides trend analysis of growth expected in the coming months. However, it should be noted that the analysis or figures are based on actual passengers that have already travelled in the previous months but for the coming months, the estimates are based on bookings at the time when the data was downloaded.

Although the data can be used for trend analysis, it should be noted that passengers per route do not necessarily mean that they are from the country of departure whereas actual tourist arrivals figures released by Statistics South Africa are based on the country of residence.

ESTIMATES FOR FEBRUARY: 2015-2020

Table 5 indicates the percentage growth of air tourist arrivals for February 2015-2020. This is to indicate the difference in the growth of tourist air arrivals and air passengers as per ForwardKeys data.

Table 5: Percentage growth of air tourist arrivals and air passengers for February 2015-2020

| Indicator | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|--------|-------|------|------|-------|--------------------|
| % Difference of Tourist Air arrivals as per Stats SA Report | -6,3% | 13,8% | 8,6% | 1,7% | -2,4% | Data not Available |
| Total Air passengers (% Growth) | -11,4% | 11,6% | 9,5% | 4,7% | -9,5% | -5,7% |

Source: ForwardKeys, data as of 23 March 2020 and Stats SA, Tourism and Migration data

Although the figures of air tourist arrivals and passenger arrivals are different, both indicators followed the same pattern. According to ForwardKeys passenger data, there was a decrease of about -5.7% in passenger arrivals to South Africa for February 2020 compared to the same month in 2019.

PASSENGER BOOKINGS FOR MARCH: 2015-2020

Table 6 indicates the percentage change of air tourist arrivals for March 2015-2019 period as per Stats SA dataset as well as the percentage growth of forward bookings for March 2015-2020 period as per Forwardkeys data. It should be noted that bookings might change closer to the time of travel therefore, data should be used with caution. According to table 6 below, bookings for March 2020 might go down by -12.9% compared to March 2019 bookings.

Table 6: Percentage growth of air tourist arrivals and bookings for February 2015-2020

| Indicator | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|-------|-------|------|-------|--------|--------------------|
| % Difference of Tourist Air arrivals as per Stats SA Report | 4,0% | 8,6% | 5,4% | 5,5% | -7,3% | Data not Available |
| Total Bookings (% Growth) | -3,6% | 12,5% | 8,1% | 11,0% | -18,5% | -12,9% |

Source: ForwardKeys, data as of 23 March 2020 and Stats SA, Tourism and Migration data