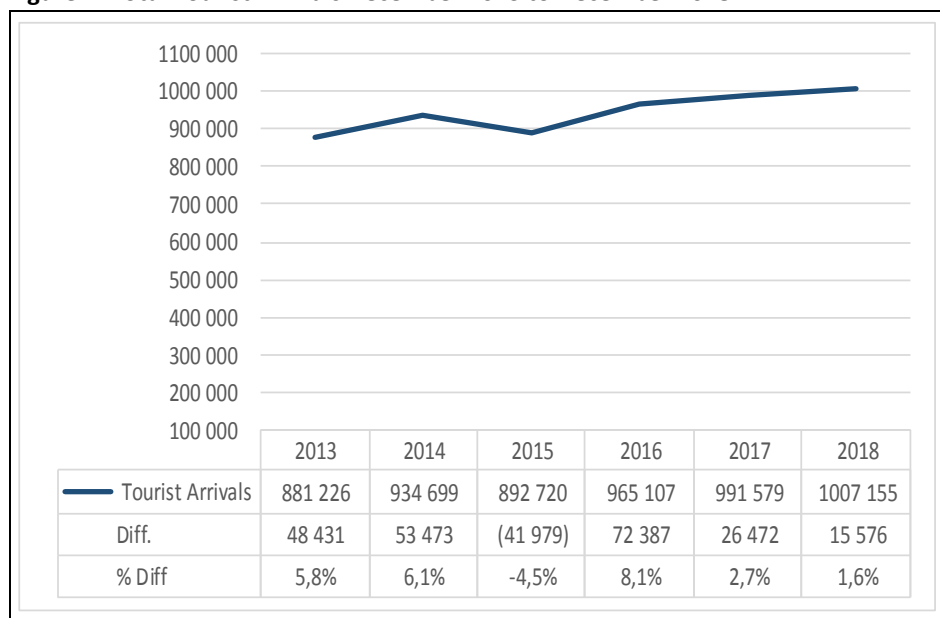


## SUMMARY OF TOURIST ARRIVALS: DECEMBER 2018

### TREND ANALYSIS: DECEMBER 2013-DECEMBER 2018

A total of 1 007 155 tourist arrivals was recorded in December 2018, which was an increase of 1.6% (15 576) compared to the same month in 2017. Figure 1 indicates tourist arrivals for the period December 2013 to December 2018. Tourism arrivals increased from 881 226 in 2013 to 934 699 in 2014, which was an increase of 6.1% (53 473). Tourist arrivals decreased from 934 699 in 2014 to 892 720 in 2015, which was a decrease of about -4.5% (-41 979). In December 2016 tourist arrivals increased by 8.1% (72 387) when compared to the same month in 2015. Comparing December 2017 with December 2016, there was a growth of 2.7% (26 472) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals December 2013 to December 2018



### DECEMBER 2018 COMPARED TO DECEMBER 2017 BY REGION

Table 1 indicates tourist arrivals by region for December 2018 compared to the same month in 2017. Arrivals from overseas markets decreased by -0.9% (-2 325) during this period. Most of the overseas regions recorded a decrease in tourist arrivals during the period under review except for North America. Central and South America recorded the highest decrease (-7.6%), followed by Australasia (-7.5%), Middle East (-2.7%), Asia (-1.2%) and Europe (-0.3%). North America recorded an increase of 1.2% for the period under review. Africa recorded an increase of 2.4% (17 653) and this region remains the main source of tourist arrivals to the country, accounting for about 74.1% (746 503) of total arrivals during this month.

Table 1: Total Tourist Arrivals by Region: December 2018 vs. December 2017

REGION	December 2017	December 2018	Diff	% Diff.
EUROPE	167 732	167 239	-493	-0,3%
NORTH AMERICA	41 116	41 623	507	1,2%
CENTRAL & SOUTH AMERICA	11 132	10 282	-850	-7,6%
AUSTRALASIA	15 005	13 882	-1 123	-7,5%
MIDDLE EAST	3 609	3 512	-97	-2,7%
ASIA	23134	22865	-269	-1,2%
TOTAL OVERSEAS	261 728	259 403	-2 325	-0,9%
TOTAL AFRICA	728 850	746 503	17 653	2,4%
Unspecified	1 001	1 249	248	24,8%
GRAND TOTAL	991 579	1 007 155	15 576	1,6%

## JANUARY-DECEMBER 2018 COMPARED TO JANUARY-DECEMBER 2017

Arrivals for the period January-December 2018 compared to the same period in 2017 are indicated in Table 2. Total tourist arrivals (10 472 105) went up by 1.8% for the period January to December 2018 compared to arrivals recorded during the same period in 2017 (10 285 197). Total tourist arrivals from the overseas market declined by -1.5% (-40 987), which was influenced by a decrease in tourist arrivals from the Middle East (-10.8%), Europe (-2.5%), Asia (-2.0%), and Australasia (-1.8%). The negative growth recorded in the Middle East was driven by Iran and Saudi Arabia with a decline in tourist arrivals of -37.5% (-1 992) and -27.0% (-3 015) respectively. Most countries within the Europe region recorded a decline in tourist arrivals with Portugal having the highest negative growth rate of -17.3% (-6 655) for the period under review. The decline in Asia was driven by a decrease in tourist arrivals from most countries from this region including India and China with a decline of -4.6% (-4 493) and -0.2% (-154) respectively. Compared to other regions, the Central and South America region had the highest growth of 8.3% (8 934) during this period, which was driven by an increase of 30.7% (4 565) of tourist arrivals from Argentina. North America recorded an increase of 1.5%; and Africa has seen an increased growth of 3.0% (227 015) during the same period under review.

**Table 2: Total Tourist Arrivals by Region Jan-Dec 2018 vs. Jan-Dec 2017**

REGION	Jan-Dec 2017	Jan-Dec 2018	Diff	% Diff
EUROPE	1 660 848	1 618 762	-42 086	-2,5%
NORTH AMERICA	437 903	444 671	6 768	1,5%
CENTRAL & SOUTH AMERICA	107 582	116 516	8 934	8,3%
AUSTRALASIA	133 713	131 348	-2 365	-1,8%
MIDDLE EAST	55 906	49 867	-6 039	-10,8%
ASIA	317 181	310 982	-6 199	-2,0%
TOTAL OVERSEAS	2 713 133	2 672 146	-40 987	-1,5%
TOTAL AFRICA	7 559 342	7 786 357	227 015	3,0%
Unspecified	12 722	13 602	880	6,9%
GRAND TOTAL	10 285 197	10 472 105	186 908	1,8%

Table 3 gives the rankings of the top ten African source markets for the period January-December 2018 compared to January-December 2017. Most of the top ten African markets remained at the same position for the period under review except for Angola and Nigeria which swapped positions, with Angola moving to the 9<sup>th</sup> position and Nigeria to the 10<sup>th</sup> position. Most countries from the top ten African source markets recorded an increase in tourist arrivals during this period except for Zambia (-4.1%), Namibia (-4.0%), and Lesotho (-0.5%). Angola had experienced the highest

growth of 31.6%, which translates to additional 15 560 tourist arrivals, followed by Malawi (12.7%), Zimbabwe (8.3%) and Nigeria (5.6%) during the period under review.

The growth of 8.3% from Zimbabwe as a top African source market translates to

**Table 3: South Africa's Top 10 African Source Markets: Jan-Dec 2018 vs. Jan-Dec 2017**

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	2 208 930	1	2 039 932	8,3%
Lesotho	2	1 739 188	2	1 747 211	-0,5%
Mozambique	3	1 360 896	3	1 339 245	1,6%
Swaziland	4	883 735	4	876 992	0,8%
Botswana	5	688 566	5	681 379	1,1%
Namibia	6	200 367	6	208 747	-4,0%
Malawi	7	197 317	7	175 014	12,7%
Zambia	8	165 968	8	173 033	-4,1%
Angola	9	64 859	10	49 299	31,6%
Nigeria	10	53 769	9	50 921	5,6%

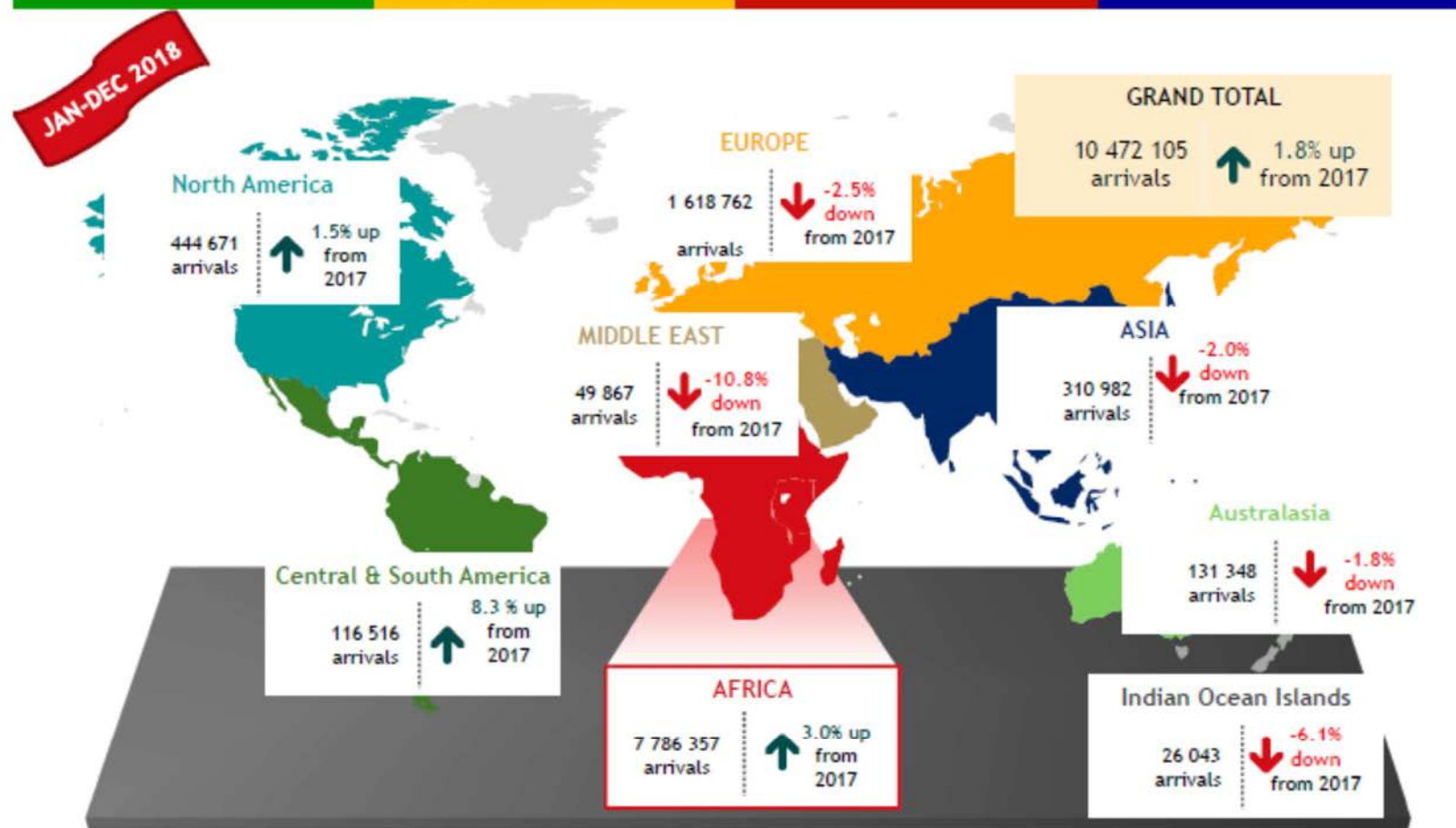
Table 4 shows the rankings of top ten overseas source markets. Comparing Jan-Dec 2018 with Jan-Dec 2017, most top 10 overseas markets recorded a decline in tourist arrivals except for Brazil (4.0%), USA (1.7%) and Canada (0.9%). Despite this decline, all top ten overseas markets remained in the same position except for China, which improved its position from 8<sup>th</sup> to 7<sup>th</sup> position replacing India. UK remains the main source market from overseas even though this country recorded a declining growth of -3.8%.

**Table 4: South Africa's Top 10 Overseas Source Markets: Jan-Dec 2018 vs. Jan-Dec 2017**

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	430 708	1	447 901	-3,8%
USA	2	376 892	2	370 747	1,7%
Germany	3	343 229	3	349 211	-1,7%
France	4	186 251	4	196 165	-5,1%
The Netherlands	5	146 925	5	159 621	-8,0%
Australia	6	115 846	6	116 257	-0,4%
China	7	96 915	8	97 069	-0,2%
India	8	93 428	7	97 921	-4,6%
Brazil	9	70 539	9	67 797	4,0%
Canada	10	67 779	10	67 156	0,9%

**TOP TEN OVERSEAS AND AFRICA MARKETS TOTAL TOURIST ARRIVALS: JANUARY-DECEMBER 2018 COMPARED TO JANUARY-DECEMBER 2017**

International tourist arrivals to South Africa grew by 1.8% in 2018 compared to the same period in 2017. Growth was recorded from Africa-land markets and Central & South America, with a small increase from North America. The rest of the regions recorded declines in tourist arrivals



Note : Tourist Arrivals figures shown above for Jan - Dec 2018  
 Source: Statssa Tourism & Migration release SA Tourism analysis

TOTAL TOURIST ARRIVALS BY REGION JANUARY-DECEMBER 2018 COMPARED TO JANUARY-DECEMBER 2017

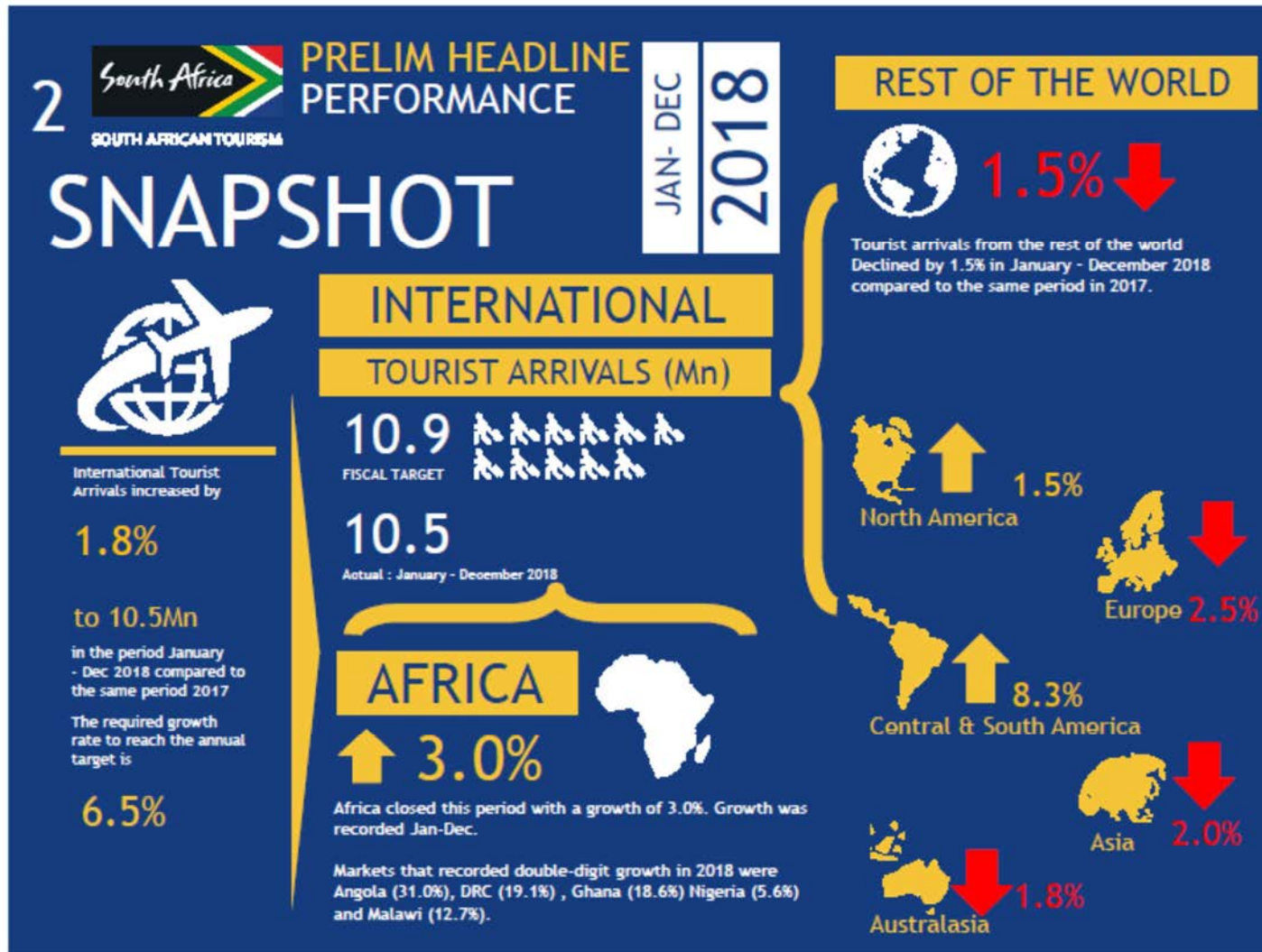
TOP FIVE OVERSEAS  
SOURCE MARKETS

Country	Arrivals
UK 	430 708 -3,8% down from 2017 
USA 	376 892 1,7% up from 2017 
Germany 	343 229 -1,7% down from 2017 
France 	186 251 -5,1% down from 2017 
Netherlands 	146 925 -8,0% down from 2017 

TOP FIVE AFRICA  
SOURCE MARKETS

Country	Arrivals
Zimbabwe 	2 208 930 8,3% up from 2017 
Lesotho 	1 739 188 -0,5% down from 2017 
Mozambique 	1 360 896 1,6% up from 2017 
Swaziland 	883 735 0,8% up from 2017 
Botswana 	688 566 1,1% up from 2017 

HEADLINE PERFORMANCE: JANUARY TO DECEMBER 2018  
INTERNATIONAL



HEADLINE PERFORMANCE: JANUARY TO DECEMBER 2018  
DOMESTIC

