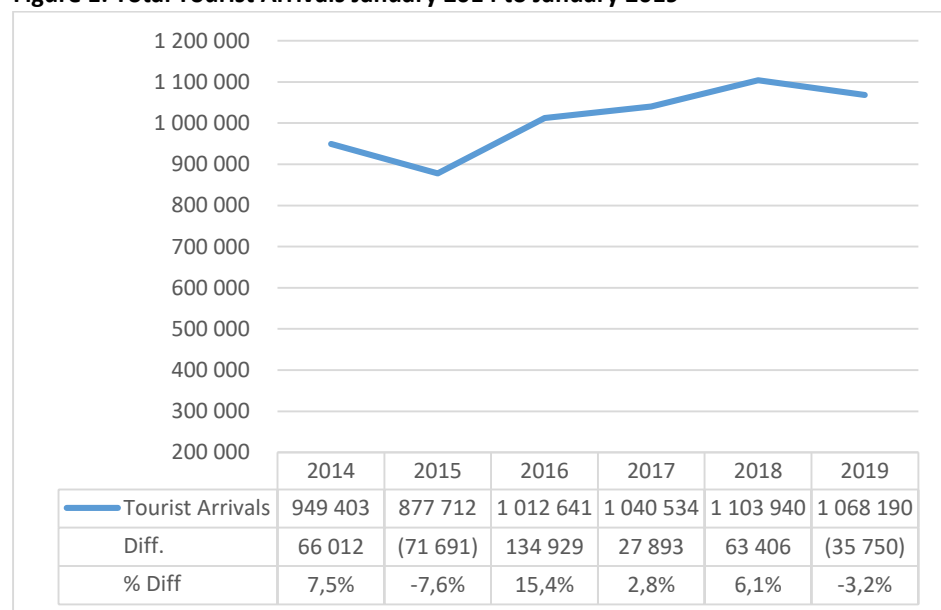


SUMMARY ANALYSIS OF TOURIST ARRIVALS: JANUARY 2019

TREND ANALYSIS: JANUARY 2014 - JANUARY 2019

A total of 1 068 190 tourist arrivals was recorded in January 2019, which was a decrease of -3.2% (-35 750) compared to the same month in 2018. Figure 1 below indicates tourist arrivals for the period January 2014 to January 2019. Tourist arrivals decreased from 949 403 in January 2014 to 877 712 in January 2015, which was a decrease of -7.6% (71 691). The highest increase in arrivals, with a double digit growth of 15,4% (134 929), was recorded in January 2016 when compared to January 2015. Comparing January 2017 with January 2016, there was a growth of 2.8% (27 893) in tourist arrivals during this period. A 6.1% growth (63 406) in tourist arrivals was seen, which was an increase from 1 040 534 tourist arrivals in January 2017 to 1 103 940 in January 2018.

Figure 1: Total Tourist Arrivals January 2014 to January 2019



JANUARY 2019 COMPARED TO JANUARY 2018 BY REGION

Table 1 below indicates tourist arrivals by region for January 2019 compared to the same month in 2018. Arrivals from overseas markets went down by -4.8%. The negative growth from overseas market was mainly driven by a double digit decline of -14.3% from Middle East followed by a decline of -8,7% in Europe and -5,3% in South America. All European markets recorded a decrease in tourist arrivals except for Austria, where a growth of 5,4% (173) was seen. United Kingdom, which is the top source market, recorded a decline of -4,2%. Asia improved from a decline of -20,3 %, recorded in January 2018 when compared to January 2017, to a growth of 11,3% in January 2019 compared the same month last year. The growth from this region was driven by tourist arrivals from Japan (65,3%), Taiwan (65,1) and China (22,4%). Africa remained the main source of arrivals to the country, however, overall it recorded a decline of -2,8%.

Table 1: Total Tourist Arrivals by Region January 2019 vs. January 2018

Region	Jan 2019	Jan 2018	Difference	% Difference
EUROPE	151 933	166 328	-14 395	-8.7%
NORTH AMERICA	30 120	28 834	1 286	4.5%
CENTRAL & SOUTH AMERICA	11 961	12 626	-665	-5.3%
AUSTRALASIA	9 867	9 855	12	0.1%
MIDDLE EAST	3 562	4 158	-596	-14.3%
ASIA	25 429	22856	2 573	11.3%
TOTAL OVERSEAS	232 872	244 657	-11 785	-4.8%
TOTAL AFRICA	834 401	858 505	-24 104	-2.8%
Unspecified	917	778	139	17.9%
GRAND TOTAL	1 068 190	1 103 940	-35 750	-3.2%

Table 2 gives the rankings of the top ten African source markets for the period January 2019 compared to January 2018. All top ten African markets remained at the same position for the period under review. Most countries recorded a decrease in tourist arrivals. Notably, Lesotho had a decline of -18.4% followed by Botswana (-8.6%), Namibia (-3.7%), Angola (-3.7%), Swaziland (-2.1%) and Zambia (-0.04%). Nigeria had experienced the highest growth of 6.9% followed by Zimbabwe (6.3%), Mozambique (4.2%) and Malawi (2.7%).

Table 3: South Africa's Top 10 African Source Markets: Jan 2019 vs. Jan 2018

Country 2019	RANK-2019	TOURIST ARRIVALS 2019	RANK-2018	TOURIST ARRIVALS 2018	% Change from 2018 to 2019
Zimbabwe	1	291 293	1	274 008	6.3%
Lesotho	2	195 516	2	239 647	-18.4%
Mozambique	3	162 393	3	155 819	4.2%
Swaziland	4	69 643	4	71 113	-2.1%
Botswana	5	39 709	5	43 427	-8.6%
Malawi	6	17 415	6	16 961	2.7%
Namibia	7	14 483	7	15 039	-3.7%
Zambia	8	13 056	8	13 061	-0.04%
Angola	9	8 355	9	8 680	-3.7%
Nigeria	10	4 374	10	4 093	6.9%

Table 4 shows rankings of top ten overseas source markets. Comparing January 2019 with January 2018, most top 10 overseas markets recorded a decline in tourist arrivals except for China (22.4%), USA (3.2%) and Australia (1.2%). Despite this decline, all of the top ten overseas markets remained in the same position except for China, which improved from 11th to 7th position, and India from 9th to 8th position in 2019. During the period under review, Sweden and Brazil dropped from 7th to 10th and 8th to 9th position respectively. UK remained the main source market from overseas despite this country's negative growth of -4.2%.

Table 4: South Africa's Top 10 Overseas Source Markets: Jan 2019 vs. Jan 2018

Country 2019	RANK-2019	TOURIST ARRIVALS 2019	RANK-2018	TOURIST ARRIVALS 2018	% Change from 2018 to 2019
UK	1	46 633	1	48 663	-4.2%
Germany	2	31 501	2	35 434	-11.1%
USA	3	24 193	3	23 454	3.2%
France	4	13 595	4	15 681	-13.3%
The Netherlands	5	12 888	5	13 665	-5.7%
Australia	6	8 980	6	8 871	1.2%
China	7	7 962	11	6 506	22.4%
India	8	6 900	9	7 115	-3.0%
Brazil	9	6 523	8	7 558	-13.7%
Sweden	10	6 128	7	7 898	-22.4%

Figure below indicates a snap view of tourist arrivals to South Africa by regions for the period January 2019 compared to January 2018.

