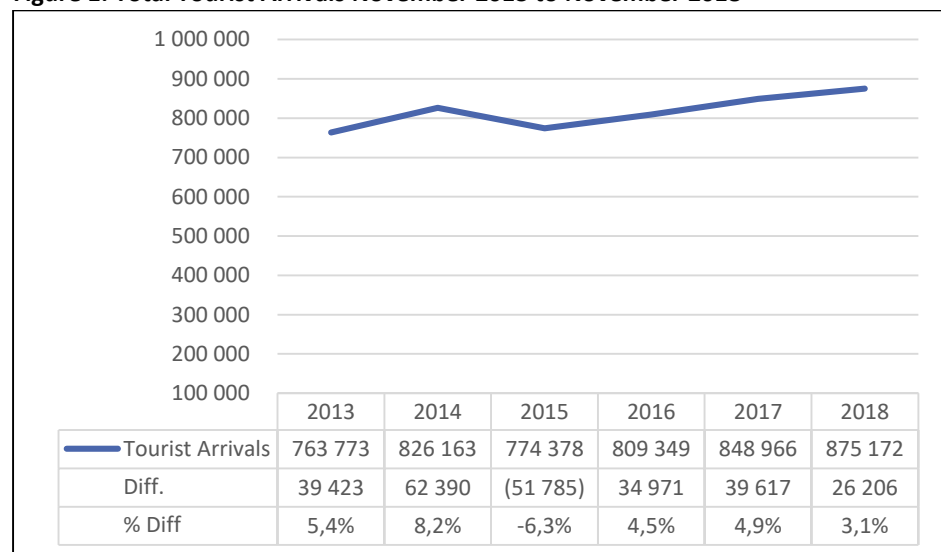


## SUMMARY ANALYSIS OF TOURIST ARRIVALS: NOVEMBER 2018

### TREND ANALYSIS: NOVEMBER 2013-NOVEMBER 2018

A total of 875 172 tourist arrivals was recorded in November 2018, which was an increase of 3.1% (26 206) compared to the same month in 2017. Figure 1 below indicates tourist arrivals for the period November 2013 to November 2018. Tourist arrivals increased from 763 773 in 2013 to 826 163 in 2014, which was an increase of 8,2% (62 390). Tourist arrivals decreased from 826 163 in 2014 to 774 378 in 2015, which was a decrease of about -6.3% (-51 785). Tourist arrivals increased by 4.5% (34 971) in November 2016 compared to the same month in 2015. Comparing November 2017 with November 2016, there was a growth of 4.9% (39 617) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals November 2013 to November 2018



### NOVEMBER 2018 COMPARED TO NOVEMBER 2017 BY REGION

Table 1 below indicates tourist arrivals by region including total overseas markets for November 2018 compared to the same month in 2017. Arrivals from overseas markets decreased by -1.3% (-3 268) during this period. However, most of the overseas regions recorded an increase in tourist arrivals during the period under review, except for Europe and the Middle East. Central and South America recorded the highest increase (15.4%), followed by Australasia (9.4%), Asia (7.6%) and North America (5.3%). Europe (-9.9%) and Middle East (-3.7%) recorded a decline for the period under review. Africa recorded an increase of 5.0% (29 145) and this region remains the main source of tourist arrivals to the country, accounting for about 70.5% (617 076) of total arrivals during November 2018.

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

Region	November 2017	November 2018	Difference	% Difference
EUROPE	180 402	171 540	-8 862	-4.9%
NORTH AMERICA	32 520	34 244	1 724	5.3%
CENTRAL & SOUTH AMERICA	8 281	9 555	1 274	15.4%
AUSTRALASIA	8 351	9 137	786	9.4%
MIDDLE EAST	4 255	4 096	-159	-3.7%
ASIA	25 996	27 965	1 969	7.6%
TOTAL OVERSEAS	259 805	256 537	-3 268	-1.3%
TOTAL AFRICA	587 931	617 076	29 145	5.0%
Unspecified	1 230	1 559	329	26.7%
<b>GRAND TOTAL</b>	<b>848 966</b>	<b>875 172</b>	<b>26 206</b>	<b>3.1%</b>

## JANUARY-NOVEMBER 2018 COMPARED TO JANUARY-NOVEMBER 2017

Arrivals for the period January-November 2018 compared to the same period in 2017 are indicated in Table 2 below. Total tourist arrivals (9 464 950) went up by 1.8% for the period January to November 2018 compared to arrivals recorded during the same period in 2017 (9 293 618). Total tourist arrivals from the overseas market declined by -1.6% (-38 662), which was influenced by a decline recorded in the Middle East (-11.4%), Europe (-2.8%), Asia (-2.0%), and Australasia (-1.0%). The Middle East declining growth was driven by Iran's and Saudi Arabia's negative growth of -38.2% (-1 943) and -29.5% (-3 177) respectively. Most countries within the Europe region recorded a decline in tourist arrivals with Portugal having the highest decline of -18.4% (-6 441) 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 -3.9% (-3 477) and -0.6% (-563) respectively. Compared to other regions, the Central and South America region had the highest growth of 10.1% (9 784) during this period, which was driven by an increase of about 29.6% (4 125) of tourist arrivals from Argentina. North America recorded an increase of 1.6%, and tourist arrivals from Africa increased by 3.1% (209 362) during the same period under review.

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

Region	Jan to Nov 2017	Jan to Nov 2018	Difference	% Difference
EUROPE	1 493 116	1 451 523	-41 593	-2.8%
NORTH AMERICA	396 787	403 048	6 261	1.6%
CENTRAL & SOUTH AMERICA	96 450	106 234	9 784	10.1%
AUSTRALASIA	118 708	117 466	-1 242	-1.0%
MIDDLE EAST	52 297	46 355	-5 942	-11.4%
ASIA	294 047	288 117	-5 930	-2.0%
TOTAL OVERSEAS	2 451 405	2 412 743	-38 662	-1.6%
TOTAL AFRICA	6 830 492	7 039 854	209 362	3.1%
Unspecified	11 721	12 353	632	5.4%
<b>GRAND TOTAL</b>	<b>9 293 618</b>	<b>9 464 950</b>	<b>171 332</b>	<b>1.8%</b>

Table 3 gives the rankings of the top ten African source markets for the period January-November 2018 compared to January-November 2017. Most of the top ten African markets remained at the same position for the period under review. Malawi improved its position from 7<sup>th</sup> to 6<sup>th</sup> position while Namibia dropped from 6<sup>th</sup> to the 7<sup>th</sup> position in 2018. Angola and Nigeria swapped positions, with Angola moving up to the 9<sup>th</sup> position and Nigeria dropping 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 (-4.0%), Namibia (-3.8%), and Lesotho (-0.2%). Angola experienced the highest growth of 38.2%, which translates to additional 16 062 tourist arrivals from this country during the period under review.

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

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	1 981 768	1	1 830 453	8.3%
Lesotho	2	1 606 663	2	1 609 457	-0.2%
Mozambique	3	1 244 228	3	1 226 919	1.4%
Swaziland	4	795 036	4	792 703	0.3%
Botswana	5	598 399	5	587 185	1.9%
Malawi	6	181 803	7	159 982	13.6%
Namibia	7	175 204	6	182 196	-3.8%
Zambia	8	149 881	8	156 176	-4.0%
Angola	9	58 068	10	42 006	38.2%
Nigeria	10	49 039	9	46 842	4.7%

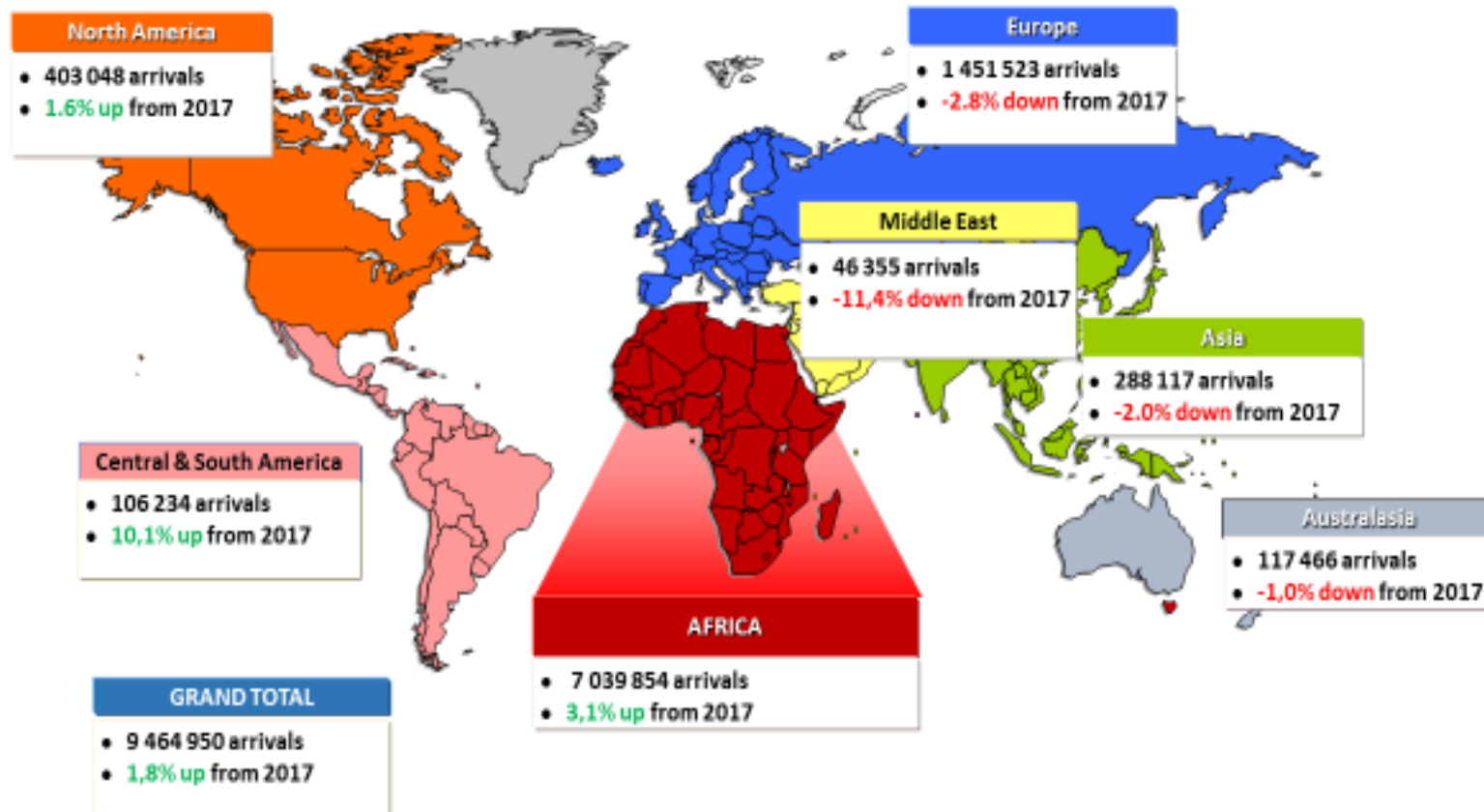
Table 4 shows rankings of top ten overseas source markets. Comparing Jan-November 2018 with Jan-November 2017, most top 10 overseas markets recorded a decline in tourist arrivals except for Brazil (6.9%), USA (1.7%), Canada (1.2%) and Australia (0.5%). Despite this decline, all of the top ten overseas markets remained in the same position except for Brazil which improved its position moving from 10<sup>th</sup> to 9<sup>th</sup> position while Canada dropped from 9<sup>th</sup> to 10<sup>th</sup> position in 2018. UK remains the main source market from overseas even though this country recorded a decline of -4.2%.

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

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	380 692	1	397 265	-4.2%
USA	2	342 331	2	336 763	1.7%
Germany	3	309 901	3	316 651	-2.1%
France	4	172 561	4	181 801	-5.1%
The Netherlands	5	132 371	5	144 558	-8.4%
Australia	6	104 027	6	103 499	0.5%
China	7	91 230	7	91 793	-0.6%
India	8	86 405	8	89 882	-3.9%
Brazil	9	63 816	10	59 701	6.9%
Canada	10	60 717	9	60 024	1.2%




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

Figure below gives a snap view of tourist arrivals to South Africa by regions for the period January-November 2018.



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

### TOP FIVE OVERSEAS SOURCE MARKETS

Country	Arrivals
UK 	380 692 -4,2% down from 2017 
USA 	342 331 1,7% up from 2017 
Germany 	309 901 -2,1% down from 2017 
France 	172 561 -5,1% down from 2017 
Netherlands 	132 371 -8,4% down from 2017 

### TOP FIVE AFRICA SOURCE MARKETS

Country	Arrivals
Zimbabwe 	1 981 768 8,3% up from 2017 
Lesotho 	1 606 663 -0,2% down from 2017 
Mozambique 	1 244 228 1,4% up from 2017 
Swaziland 	795 036 0,3% up from 2017 
Botswana 	598 399 1,9% up from 2017 