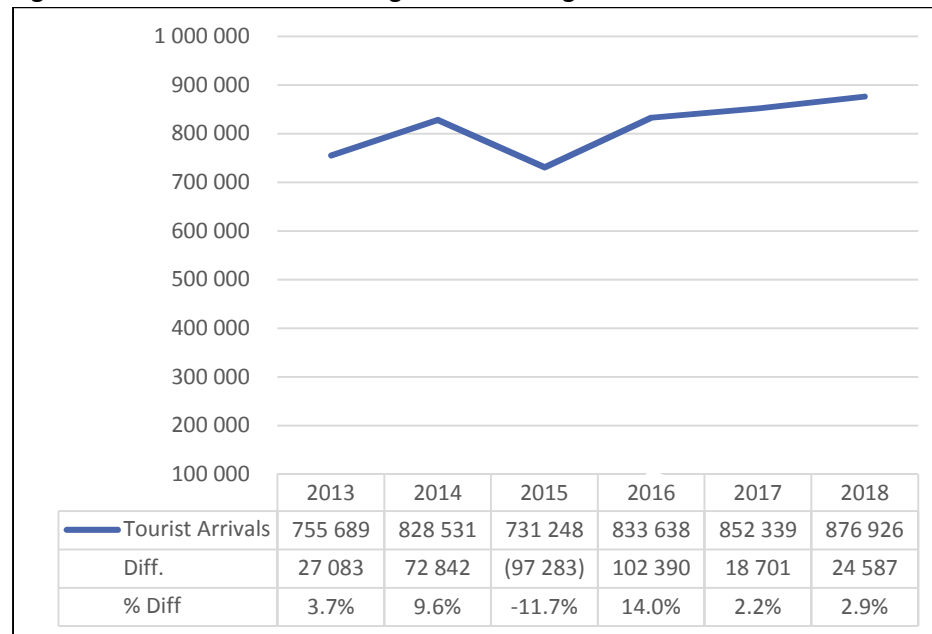


## SUMMARY ANALYSIS OF TOURIST ARRIVALS: AUGUST 2018

### TREND ANALYSIS: AUGUST 2013-AUGUST 2018

A total of 876 926 tourist arrivals was recorded in August 2018; an increase of 2.9% (24 587) compared to the same month in 2017. Figure 1 indicates the tourist arrivals for the period August 2013 to August 2018. Tourist arrivals increased from 755 689 in August 2013 to 828 531 in August 2014; an increase of about 9.6% (72 842). Tourist arrivals decreased by -11.7% (-97 283) in August 2015 compared to the same month in 2014. Comparing August 2016 with August 2015, there was a double digit growth of 14.0% (102 390) in tourist arrivals during this period. In 2017, tourist arrivals grew by 2.2% (18 701), increasing from 833 638 in August 2016 to 852 339 in August 2017.

**Figure 1: Total Tourist Arrivals: August 2013 to August 2018**



### AUGUST 2018 COMPARED TO AUGUST 2017 BY REGION

Table 1 indicates tourist arrivals by region for August 2018 compared to the same month in 2017. Arrivals from the overseas markets increased by 0.2% (467) during this period. Most of the overseas regions recorded a positive growth in tourist arrivals during the period under review. Central and South America recorded the highest increase (30.3%), followed by North America (3.2%), Australasia (2.6%) and Asia (0.5%). Increase in arrivals from Central and South America was driven by a double digit growth of about 65.7% recorded in Argentina. The Middle East and Europe were the only overseas regions that recorded a decline of -23.3%, and -1.3% respectively. The decrease in tourist arrivals from the Middle East was mainly driven by Iran and Saudi Arabia, which recorded a decline of -45.1% and -43.7% respectively. Africa recorded an increase of 3.8% and remained the main source of tourist arrivals to the country, accounting for about 75.5% (662 058) of total arrivals in August 2018.

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

Region	August 2017	August 2018	Difference	% Difference
Europe	123 379	121 751	1 628	-1.3
North America	37 272	38 467	1 195	3.2
Central & South America	6 934	9 034	2 100	30.3
Australasia	12 237	12 557	320	2.6
Middle East	7 044	5 404	1 640	-23.3
Asia	26 428	26 548	120	0.5
TOTAL OVERSEAS	213 294	213 761	467	0.2
Africa Land	610 447	630 672	20 225	3.3
Africa Air	27 553	31 386	3 833	13.9
TOTAL AFRICA	638 000	662 058	24 058	3.8
Unspecified	1 045	1 107	62	5.9
GRAND TOTAL	852 339	876 926	24 587	2.9

## JANUARY-AUGUST 2018 COMPARED TO JANUARY–AUGUST 2017

Arrivals for the period January to August 2018 compared to the same period in 2017 are indicated in Table 2. Total tourist arrivals (6 885 371) went up by 2.3% (153 965) for the period January to August 2018 compared to arrivals recorded during the same period in 2017 (6 731 406). Total tourist arrivals from the overseas market declined by -1.3% (-22 779), which was influenced by a decline from the Middle East (-13.5%), Asia (-2.5%) and Europe (-2.2%). The declining growth from Middle East was driven by a decline from Saudi Arabia (-31.2%) and Iran (-29.0%). The negative growth seen in Asia was driven by a decrease in tourist arrivals from most countries from this region including India (-3.6%) and China (-1.8%). Tourist arrivals from Africa increased by 3.5% (176 199) during the period under review. Compared to other regions, the Central and South America region had the highest growth of 9.4% (6 587) during this period that was driven by an increase of 30.1% of tourist arrivals from Argentina. Most countries within the Europe region experienced a decline in tourist arrivals, with Portugal experiencing the highest decline of -20.7% for the period under review.

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

Region	Jan to August 2017	Jan to August 2018	Difference	% Difference
Europe	1 020 597	998 635	-21 962	-2.2
North America	289 455	293 314	3 859	1.3
Central & South America	70 263	76 850	6 587	9.4
Australasia	84 615	83 887	-728	-0.9
Middle East	39 470	34 150	-5 320	-13.5
Asia	211 455	206 240	-5 215	-2.5
<b>TOTAL OVERSEAS</b>	<b>1 715 855</b>	<b>1 693 076</b>	<b>-22 779</b>	<b>-1.3</b>
Africa Land	4 800 531	4 962 943	162 412	3.4
Africa Air	207 135	220 922	13 787	6.7
<b>TOTAL AFRICA</b>	<b>5 007 666</b>	<b>5 183 865</b>	<b>176 199</b>	<b>3.5</b>
Unspecified	7 885	8 430	545	6.9
<b>GRAND TOTAL</b>	<b>6 731 406</b>	<b>6 885 371</b>	<b>153 965</b>	<b>2.3</b>

Table 3 gives the rankings of the top ten African source markets for the period January–August 2018 compared to January–August 2017. Most of the top ten African markets remained at the same position for the period under review. Malawi improved its position from 8<sup>th</sup> to 6<sup>th</sup> position while Namibia dropped from 6<sup>th</sup> to 7<sup>th</sup> position in 2018. Zambia also dropped from 7<sup>th</sup> to 8<sup>th</sup> position. Angola and Nigeria swapped positions,

with Angola moving up to 9<sup>th</sup> position and Nigeria dropping to 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 Namibia (-4.2%), Zambia (-3.6%) and Swaziland (-0.1%). Angola experienced the highest growth of 38.0%, followed by Malawi (13.6%), Zimbabwe (7.4%) and a slight growth of 2.7% from Mozambique. The growth from Angola brought an additional 11 958 tourist arrivals from this country to South Africa during the period under review.

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

Country	Rank 2018	Tourist Arrivals 2018	Rank 2017	Tourist Arrivals 2017	% Change from 2017 to 2018
Zimbabwe	1	1 465 576	1	1 365 027	7.4
Lesotho	2	1 220 739	2	1 203 241	1.5
Mozambique	3	918 654	3	894 107	2.7
Swaziland	4	571 229	4	571 766	-0.1
Botswana	5	423 337	5	408 608	3.6
Malawi	6	127 588	8	112 313	13.6
Namibia	7	127 148	6	132 729	-4.2
Zambia	8	108 672	7	112 740	-3.6
Angola	9	43 461	10	31 503	38.0
Nigeria	10	34 701	9	34 056	1.9

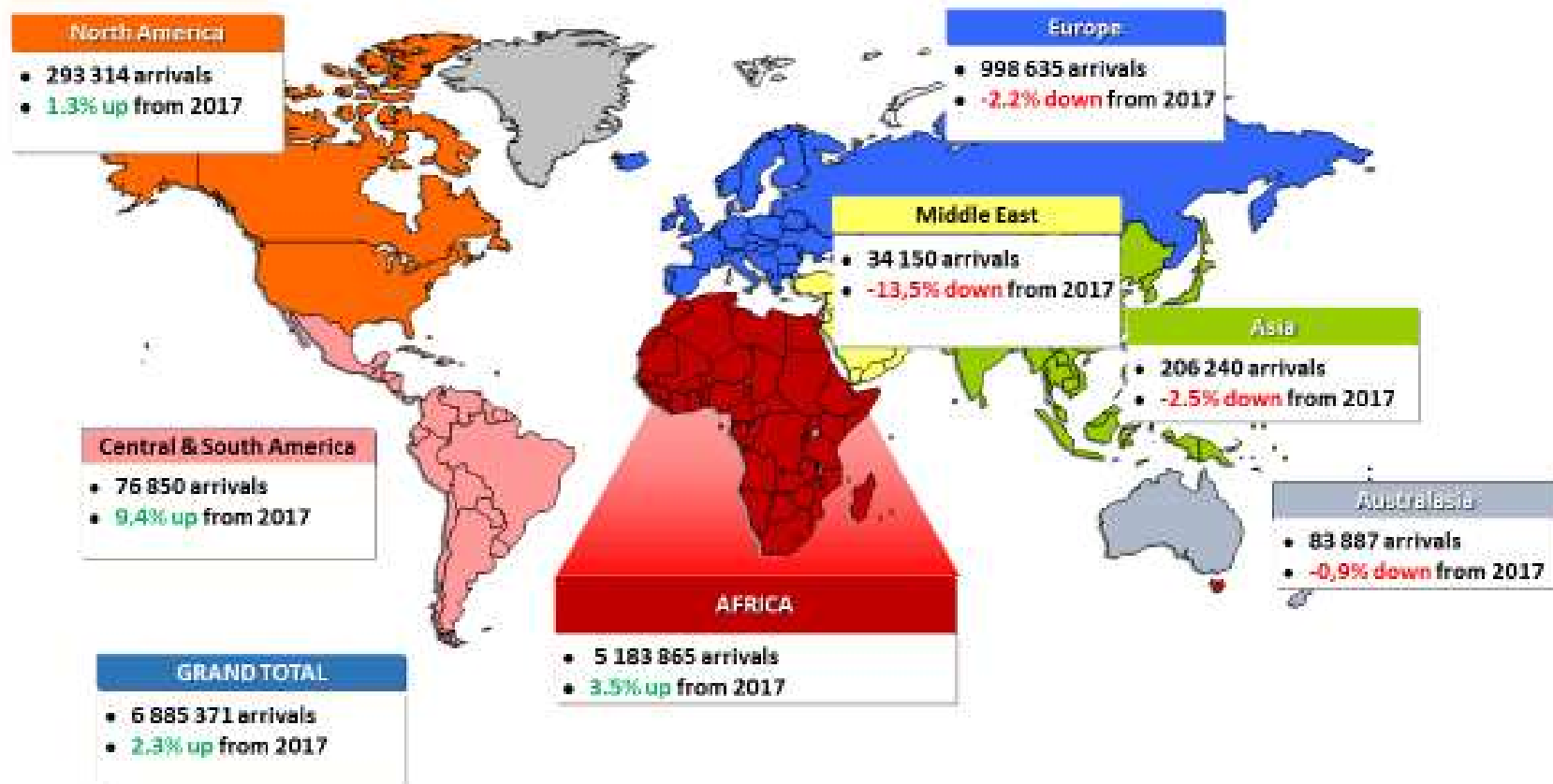
Table 4 shows the rankings of the top ten overseas source markets. Comparing January–August 2018 with January–August 2017, most top 10 overseas markets recorded a declining growth except for Brazil (6.1%), Italy (3.6%), USA (1.4%) and Australia (0.7%). Despite this decline, most of the top ten overseas markets remained in the same position in January–August 2018 compared to the same period in 2017, except for Italy which replaced Canada as the 10<sup>th</sup> source market. The Netherlands had the highest declining growth (-8.3%) but this country maintained its 5<sup>th</sup> position despite this decline. UK remained the main source market from overseas even though this country recorded a declining growth of -4.3%.

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

Country 2018	Rank 2018	Tourist Arrivals 2018	Rank 2017	Tourist Arrivals 2017	% Change from 2017 to 2018
UK	1	277 030	1	289 522	-4.3
USA	2	252 050	2	248 579	1.4
Germany	3	196 870	3	198 521	-0.8
France	4	116 464	4	121 124	-3.8
The Netherlands	5	90 513	5	98 730	-8.3
Australia	6	74 356	6	73 859	0.7
India	7	64 115	7	66 482	-3.6
China	8	63 405	8	64 575	-1.8
Brazil	9	45 352	9	42 750	6.1
Italy	10	41 733	11	40 266	3.6

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

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



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

**TOP FIVE OVERSEAS  
SOURCE MARKETS**

Country	Arrivals
UK 	277 030 -4.3% down from 2017 
USA 	252 050 1.4% up from 2017 
Germany 	196 870 -0.8% down from 2017 
France 	116 464 -3.8% down from 2017 
Netherlands 	90 413 -8.3% down from 2017 

**TOP FIVE AFRICA  
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	1 465 576 7.4% up from 2017 
Lesotho 	1 220 739 1.5% up from 2017 
Mozambique 	918 654 2.7% up from 2017 
Swaziland 	571 229 -0.1% up from 2017 
Botswana 	423 337 3.6% up from 2017 