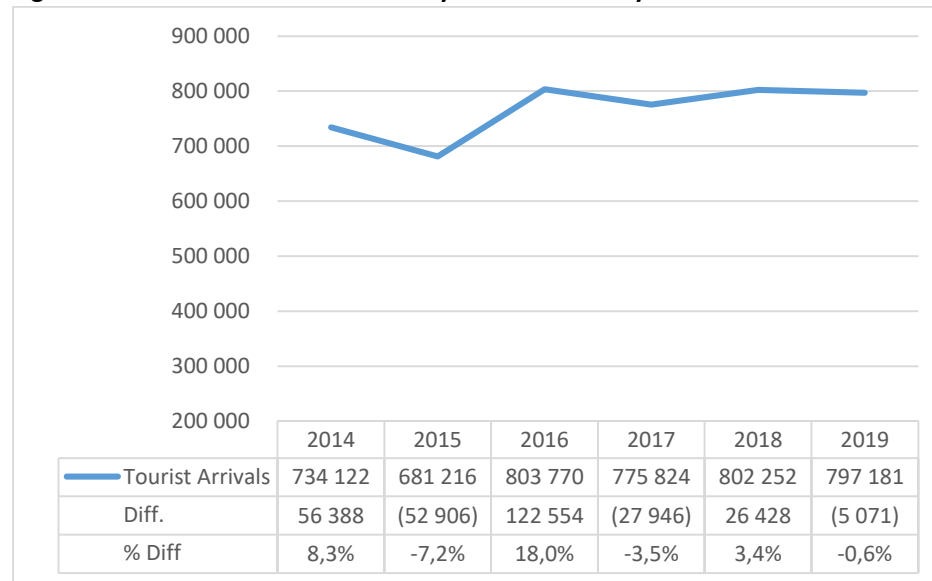


SUMMARY ANALYSIS OF TOURIST ARRIVALS: FEBRUARY 2019

TREND ANALYSIS: FEBRUARY 2014 - FEBRUARY 2019

A total of 797 181 tourist arrivals was recorded in February 2019, which was a decrease of -0.6% (-5 071) compared to the same month in 2018. Figure 1 indicates tourist arrivals for the period February 2014 to February 2019. Tourist arrivals decreased from 734 122 in 2014 to 681 216 in 2015 which was a decline of -7.2% (-52 906). Tourist arrivals increased from 681 216 in 2015 to 803 770 in 2016, which was an increase of about 18.0% (122 554). However, tourist arrivals decreased by -3.5% (-27 946) in February 2017 compared to the same month in 2016. Comparing February 2018 with February 2017, there was a growth of 3.4% (26 482) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals February 2014 to February 2019



FEBRUARY 2019 COMPARED TO FEBRUARY 2018 BY REGION

Table 1 indicates tourist arrivals by region for February 2019 compared to the same month in 2018. Arrivals from overseas markets decreased by -4.9% (-12 729) during this period. All of the overseas regions recorded a decline in tourist arrivals during the period under review. Australasia recorded the highest decline (-6.9%), followed by Asia (-5.9%), North America (-5.2%), Europe (-4.8%), Middle East (-4.4%) and Central and South America (-2.9%). Africa recorded an increase of 1.4% (7 340) and this region remains the main source of tourist arrivals to the country, accounting for about 68.9% (549 445) of total arrivals during this month.

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

REGION	FEBRUARY 2019	FEBRUARY 2018	DIFF.	% DIFF.
Europe	169 025	177 473	-8 448	-4.8%
North America	30 016	31 648	-1 632	-5.2%
Central & South America	9 950	10 245	-295	-2.9%
Australasia	7 447	7 995	-548	-6.9%
Middle East	4 066	4 253	-187	-4.4%
Asia	25 890	27 509	-1 619	-5.9%
TOTAL OVERSEAS	246 394	259 123	-12 729	-4.9%
TOTAL AFRICA	549 445	542 105	7 340	1.4%
Unspecified	1 342	1 024	318	31.1%
GRAND TOTAL	797 181	802 252	-5 071	-0.6%

JANUARY-FEBRUARY 2019 COMPARED TO JANUARY-FEBRUARY 2018

Arrivals for the period January-February 2019 compared to the same period in 2018 are indicated in Table 2. Total tourist arrivals (1 865 371) went down by -2.1% for the period January to February 2019 compared to arrivals recorded during the same period in 2018 (1 906 192). Total tourist arrivals from the overseas market declined by -4.9% (-24 514), which was influenced by a decline recorded in the Middle East (-9.3%), Europe (-6.6%), Central and South America (-4.2%), Australasia (-3.0%) and North America (-0.6%). Most countries in the Middle East had a decline in tourist arrivals including Saudi Arabia with a decline of -22.6% (-280). The declining growth recorded in Europe was influenced by most of the countries in the region recording a decline except for Austria with a growth of 7.5% (551). The decline in Central and South America was driven by a decrease recorded in tourist arrivals from most countries from this region including Brazil and Argentina with a decline of -7.9% (-977) and -5.1% (-321) respectively for the same period under review. Compared to other regions, only Asia had a growth of 1.9% (954) during this period. The growth from this region was driven by an increase of about 34.7% (1 182) of tourist arrivals from Japan. China also had an increase of 1.5% (259) however India declined by -7.8% (-1 140). Tourist arrivals from Africa declined by -1.2% (-16 764) during the same period under review.

Table 2: Total Tourist Arrivals by Region Jan-Feb 2019 vs. Jan-Feb 2018

REGION	JAN-FEB 2019	JAN-FEB 2018	DIFF.	% DIFF.
Europe	320 958	343 801	-22 843	-6.6%
North America	60 136	60 482	-346	-0.6%
Central & South America	21 911	22 871	-960	-4.2%
Australasia	17 314	17 850	-536	-3.0%
Middle East	7 628	8 411	-783	-9.3%
Asia	51 319	50 365	954	1.9%
TOTAL OVERSEAS	479 266	503 780	-24 514	-4.9%
TOTAL AFRICA	1 383 846	1 400 610	-16 764	-1.2%
Unspecified	2 259	1 802	457	25.4%
GRAND TOTAL	1 865 371	1 906 192	-40 821	-2.1%

Table 3 gives the rankings of the top ten African source markets for the period January-February 2019 compared to January-February 2018. All of the top ten African markets remained at the same position for the period under review. Most countries from the top ten African source markets recorded a decrease in tourist arrivals during this period except for Zimbabwe (8.3%), Mozambique (5.2%) and Malawi (2.3%).

Zimbabwe had experienced the highest growth of 8.3%, which translates to additional 34 793 tourist arrivals to Zimbabwe during the period under review.

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

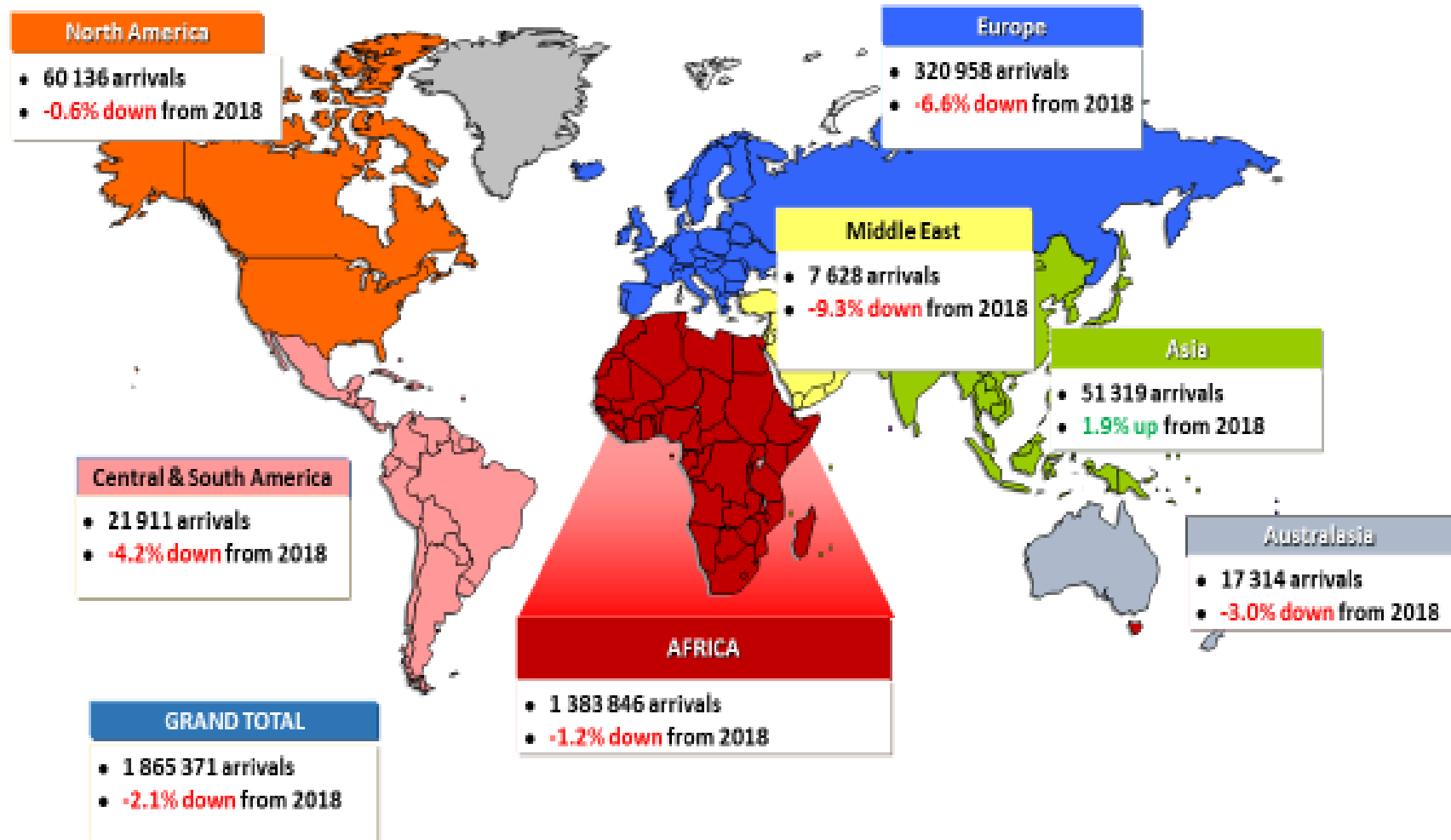
COUNTRY	RANK-2019	TOURIST ARRIVALS 2019	RANK-2018	TOURIST ARRIVALS 2018	% Change from 2018 to 2019
Zimbabwe	1	453 897	1	419 104	8.3%
Lesotho	2	303 597	2	361 958	-16.1%
Mozambique	3	268 874	3	255 592	5.2%
Swaziland	4	132 265	4	133 192	-0.7%
Botswana	5	80 146	5	86 941	-7.8%
Malawi	6	32 138	6	31 407	2.3%
Namibia	7	27 864	7	28 505	-2.2%
Zambia	8	25 185	8	26 037	-3.3%
Angola	9	14 291	9	14 598	-2.1%
Nigeria	10	7 974	10	8 314	-4.1%

Table 4 shows rankings of top ten overseas source markets. Comparing January-February 2019 with January-February 2018, most top 10 overseas markets recorded a decline in tourist arrivals except for Canada (4.2%) and China (1.5%). Despite this decline, most of the top ten overseas markets remained in the same position except for India which improved its position moving from 9th to 8th position and Sweden dropping from 8th to 9th position replacing Switzerland. Sweden however dropped from 8th to 9th position in 2019. Canada also replaced Switzerland as the 10th source market for the period under review. UK remains the main source market from overseas even though this country recorded a declining growth of -2.7%. Estimates on passenger movement and bookings from ForwardKeys for March and April 2019 are attached as Annexure 3.

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

COUNTRY	RANK-2018	TOURIST ARRIVALS 2019	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	96 758	1	99 435	-2.7%
Germany	2	68 193	2	76 164	-10.5%
USA	3	48 060	3	48 889	-1.7%
France	4	30 841	4	34 381	-10.3%
The Netherlands	5	26 185	5	27 447	-4.6%
China	6	17 910	6	17 651	1.5%
Australia	7	15 676	7	16 025	-2.2%
India	8	13 519	9	14 659	-7.8%
Sweden	9	12 816	8	15 046	-14.8%
Canada	10	12 076	12	11593	4.2%

ANNEXURE 1: TOTAL TOURIST ARRIVALS TOP TEN OVERSEAS AND AFRICA MARKETS: JANUARY-FEBRUARY 2019 COMPARED TO JANUARY-FEBRUARY 2018.



ANNEXURE 2: TOTAL TOURIST ARRIVALS BY REGION JANUARY-FEBRUARY 2019 COMPARED TO JANUARY-FEBRUARY 2018

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Arrivals
UK 	96 758 -2.7% down from 2018 
Germany 	68 193 -10.5% down from 2018 
USA 	48 060 -1.7% down from 2018 
France 	30 841 -10.3% down from 2018 
Netherlands 	26 185 -4.6% down from 2018 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	453 897 8.3% up from 2018 
Lesotho 	303 597 -16.1% down from 2018 
Mozambique 	268 874 5.2% up from 2018 
Swaziland 	132 265 -0.7% down from 2018 
Botswana 	80 146 -7.8% down from 2018 

ANNEXURE 3: ESTIMATES OF PASSENGER MOVEMENTS AND BOOKINGS FROM FORWARDKEYS

The Department of Tourism has subscribed to ForwardKeys to monitor bookings of air passengers in order to estimate the number of air arrivals to the country. This could provide trend analysis of growth expected in the coming months. However, it should be noted that these 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 this can be used for trend analysis, it should be noted that passengers per route does not necessarily mean that they are from the country of departure whereas actual tourist arrivals figures released by Statistics South Africa is based on the country of residence. Table 5 indicates the percentage growth of tourist arrivals for March for the period 2015-2018. This is to indicate the difference in the growth of tourist arrivals and passengers as per ForwardKeys data. The percentage growth from ForwardKeys could be an indication to show whether there will be a growth or decline in March 2019. However, further analysis is still underway to compare ForwardKeys data with only air arrivals as that could be a better comparison than comparing it with total tourist arrivals to the country noting that most of our tourist arrivals are land African markets.

Table 5: Percentage growth of tourist arrivals and air passengers for March,2015-2019

Indicator	Total Air Passengers March				
	2015	2016	2017	2018	2019
% Difference of Tourist arrivals as per Stats SA Report	-2,5%	23,4%	-10,9%	9,5%	
Total Air passengers (% Growth)	-2,2%	4,4%	10,8%	9,2%	-15,8%

Source: ForwardKeys, data as of 15 April 2019 and Stats SA, Tourism and Migration data

Although the figures of tourist arrivals and passenger arrivals are different, one might expect these indicators to follow the same pattern. The data for tourist arrivals (including land and air) do follow almost the same pattern as passenger arrivals except for 2016 and 2017 figures (see Table 5). For 2017 figures compared to 2016, it was noted that the decline in tourist arrivals recorded was driven by land arrivals which recorded a decline of -17.0% whereas arrivals from overseas and Africa air (excluding Indian Ocean Islands) went up by 5.9% and 2.7% respectively which is in-line with the trend recorded for passenger movement of +10.8%. According to ForwardKeys passenger data it is expected that air passengers to South Africa will decline by -15.8% in March 2019 compared to March 2018. If all things remain the same with no impact on land arrivals, total tourist arrivals for March 2019 could follow the same pattern. However, it should be noted that the data for March and April is sometimes effected by the Easter holidays. If Easter Holidays were in March the previous year this might lead to a decline when the Easter holidays are in April the following year.

Table 6 indicates the percentage growth of tourist arrivals for April for the period 2015-2018 as well as the percentage growth of forward bookings for April 2019 compared to April 2018. It should be noted that bookings might change closer to the time of travel and this data should be used with caution. According to the data below, bookings for April 2019 will go up by 16.7% compared to April 2018 bookings. As already indicated the trend for this month is sometimes skewed by amongst others, Easter holidays.

Table 6: Percentage growth of tourist arrivals and bookings for April, 2015-2019

	2015	2016	2017	2018	2019
% Difference of Tourist arrivals as per Stats SA Report	-14,3%	10,6%	15,5%	-5,7%	
Total Bookings (% Growth)	-20,4%	12,7%	23,1%	-13,4%	16,7%

Source: ForwardKeys, data as of 15 April 2019 and Stats SA, Tourism and Migration data

Table 7 indicates the expected growth for air passengers for the period March 2016-March 2019 as well as bookings for April 2019 compared to April 2018 bookings for the top overseas markets excluding USA as the data is not available from ForwardKeys. The data indicates that passenger movement for UK, Germany, France, Netherlands and Australia went down during March 2019 compared to the same month in 2018. Germany recorded the highest decline of -29,3% while Brazil recorded the highest growth of 15,8% during the same month. Using data for bookings, it is estimated that air passenger arrivals to the country from most of the top 10 countries will go up during April 2019 compared to the same month in 2018 except for China with the highest decline of -27,1% followed by Brazil (-2,1%) and Canada (-6,7%). It should be noted the bookings might change closer to the time of travel as the data from ForwardKeys is updated weekly. However, it is unlikely that the data will have a significant change noting that we are already in mid-April 2019.

Table 7: Total Air Passenger and Bookings

Top Overseas Markets	% Change of passengers during March				April 2019 Bookings
	2016	2017	2018	2019	
UK	13,7%	-2,8%	5,2%	-17,8%	32,0%
Germany	17,3%	-0,4%	16,3%	-29,3%	24,6%
France	-16,8%	102,6%	-4,7%	-18,4%	4,1%
The Netherlands	10,9%	20,0%	-1,5%	-2,7%	21,4%
Australia	16,3%	0,2%	22,6%	-26,5%	9,5%
China	7,5%	-10,9%	-0,1%	6,2%	-27,1%

Top Overseas Markets	% Change of passengers during March				April 2019 Bookings
	2016	2017	2018	2019	
India	-9,7%	33,5%	-13,7%	8,4%	49,0%
Brazil	9,4%	120,4%	-3,8%	15,8%	-2,1%
Canada	-5,3%	20,8%	3,1%	7,8%	-6,7%

Source: ForwardKeys, data as of 15 April 2019

Table 8 indicates the expected growth for air passenger for the period March 2016-March 2019 as well as bookings for April 2019 compared to April 2018 for the top African air markets. The data indicates that passenger movement from the most of the top African air markets will go down except for Kenya which will go up by 9,4% in March 2019 compared to the same month in 2018. However, bookings for April 2019 indicates that Angola and Ghana are expected to grow while DRC and Nigeria will continue to decline during April 2019 compared to April 2018 bookings.

Table 8: Total Air Passenger and Bookings

Top African Air Markets	% Change of passengers during March				April 2019 Bookings
	2016	2017	2018	2019	
Angola	-21,5%	-3,5%	30,9%	-9,4%	15,2%
DRC	21,1%	-6,1%	58,8%	-14,8%	-21,5%
Kenya	-8,0%	7,6%	-1,8%	9,4%	33,3%
Nigeria	-9,2%	-20,1%	18,6%	-31,7%	-6,7%
Ghana	-37,5%	20,5%	34,6%	-19,7%	10,7%

Source: ForwardKeys, data as of 15 April 2019