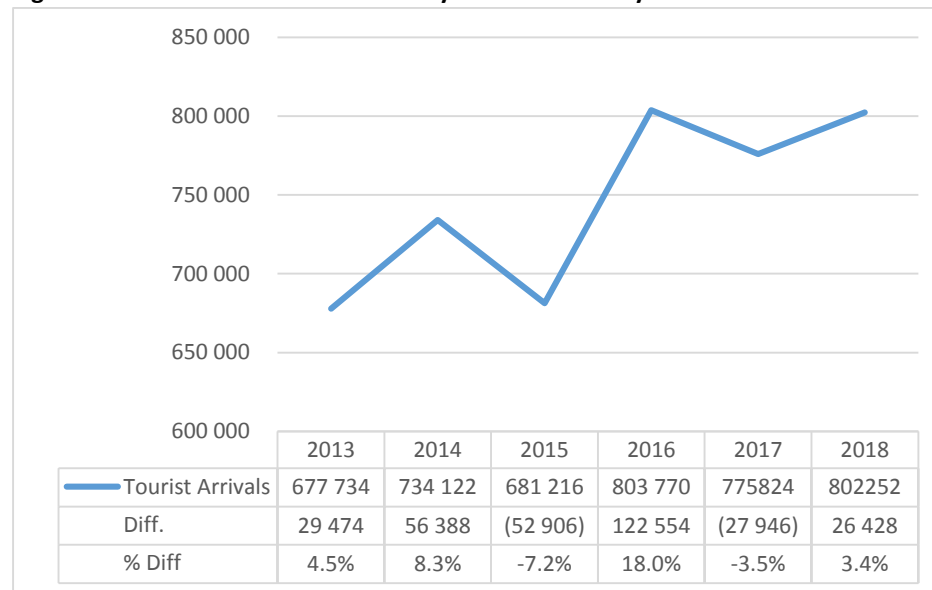


SUMMARY ANALYSIS OF TOURIST ARRIVALS: FEBRUARY 2018

TREND ANALYSIS: FEBRUARY 2013 - FEBRUARY 2018

A total of 802 252 tourist arrivals was recorded in February 2018, which was an increase of 3.4% (26 428) compared to the same month in 2017. Figure 1 below indicates tourist arrivals for the period February 2013 to February 2018. Tourist arrivals increased from 677 734 in 2013 to 734 122 in 2014, which was an increase of about 8.3%. Tourist arrivals however went down by -7.2% (-52 906) in February 2015 compared to February 2014. The highest increase in arrivals was recorded in February 2016 compared to February 2015 with a double digit growth of 18,0% recorded during this period.

Figure 1: Total Tourist Arrivals February 2013 to February 2017



FEBRUARY 2018 COMPARED TO FEBRUARY 2017 BY REGION

Table 1 below indicates tourist arrivals by region for February 2018 compared to the same month in 2017. Arrivals from overseas markets increased by 1.3% while arrivals from the continent went up by 4.5%. The decline from overseas market was recorded in Europe and Middle East with -1.9% and -0.3% respectively. Africa had a growth of 4.5% and the continent remains the main source of tourist arrivals to the country, accounting for about 67.6% (542 105) of total arrivals during this month.

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

Region	February 2017	February 2018	Difference	%Difference
EUROPE	180 867	177 473	-3 394	-1.9%
NORTH AMERICA	29 668	31 648	1 980	6.7%
CENTRAL & SOUTH AMERICA	9 771	10 245	474	4.9%
AUSTRALASIA	7 697	7 995	298	3.9%
MIDDLE EAST	4 265	4 253	-12	-0.3%
ASIA	23 633	27 509	3 876	16.4%
TOTAL OVERSEAS	255 901	259 123	3 222	1.3%
TOTAL AFRICA	518 937	542 105	23 168	4.5%
Unspecified	986	1 024	38	3.9%
GRAND TOTAL	775 824	802 252	26 428	3.4%

JANUARY - FEBRUARY 2018 COMPARED TO JANUARY - FEBRUARY 2017

Arrivals for the period January-February 2018 compared to the same period in 2017 are indicated in Table 2 below. Total tourist arrivals for the period January to February 2018 (1 906 192) went up by 4.9% compared to arrivals recorded during the same period in 2017 (1 816 358). Total tourist arrivals from overseas grew by 0.6% (2 805) while arrivals from Africa increased by 6.6% (86 996) during the first two months of 2018 compared to the same period in 2017. Compared to other sub-regions, the Central and South America region had the highest growth of 13.5% (2 725) for the period under review. Asia and the Middle East recorded a declining growth of -3,7% and -1,7% respectively during the same period under review.

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

Region	Jan-Feb 2017	Jan-Feb 2018	Difference	% Difference
EUROPE	343 826	343 801	-25	0.0%
NORTH AMERICA	58 402	60 482	2 080	3.6%
CENTRAL & SOUTH AMERICA	20 146	22 871	2 725	13.5%
AUSTRALASIA	17 745	17 850	105	0.6%
MIDDLE EAST	8 560	8 411	-149	-1.7%
ASIA	52 296	50 365	-1 931	-3.7%
TOTAL OVERSEAS	500 975	503 780	2 805	0.6%
AFRICA LAND	1 257 762	1 342 736	84 974	6.8%
AFRICA AIR	55 852	57 874	2 022	3.6%
TOTAL AFRICA	1 313 614	1 400 610	86 996	6.6%
Unspecified	1 769	1 802	33	1.9%
GRAND TOTAL	1 816 358	1 906 192	89 834	4.9%

Table 3 gives rankings of top ten African source markets for the period January-February 2017 and January-February 2018. Most of the top ten African markets remained at the same position for the period under review except for Malawi and Namibia which exchanged positions. Some of the top ten countries recorded a declining growth and Nigeria recorded the highest declining growth of -10,7%. Zimbabwe, Lesotho and Mozambique remain the top source markets from the continent.

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

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	419 104	1	381 989	9.7
Lesotho	2	361 958	2	346 472	4.5
Mozambique	3	255 592	3	235 934	8.3
Swaziland	4	133 192	4	132 389	0.6
Botswana	5	86 941	5	78 401	10.9
Malawi	6	31 407	7	27 096	15.9
Namibia	7	28 505	6	29 311	-2.7
Zambia	8	26 037	8	26 170	-0.5
Angola	9	14 598	9	10 179	43.4
Nigeria	10	8 314	10	9 305	-10.7

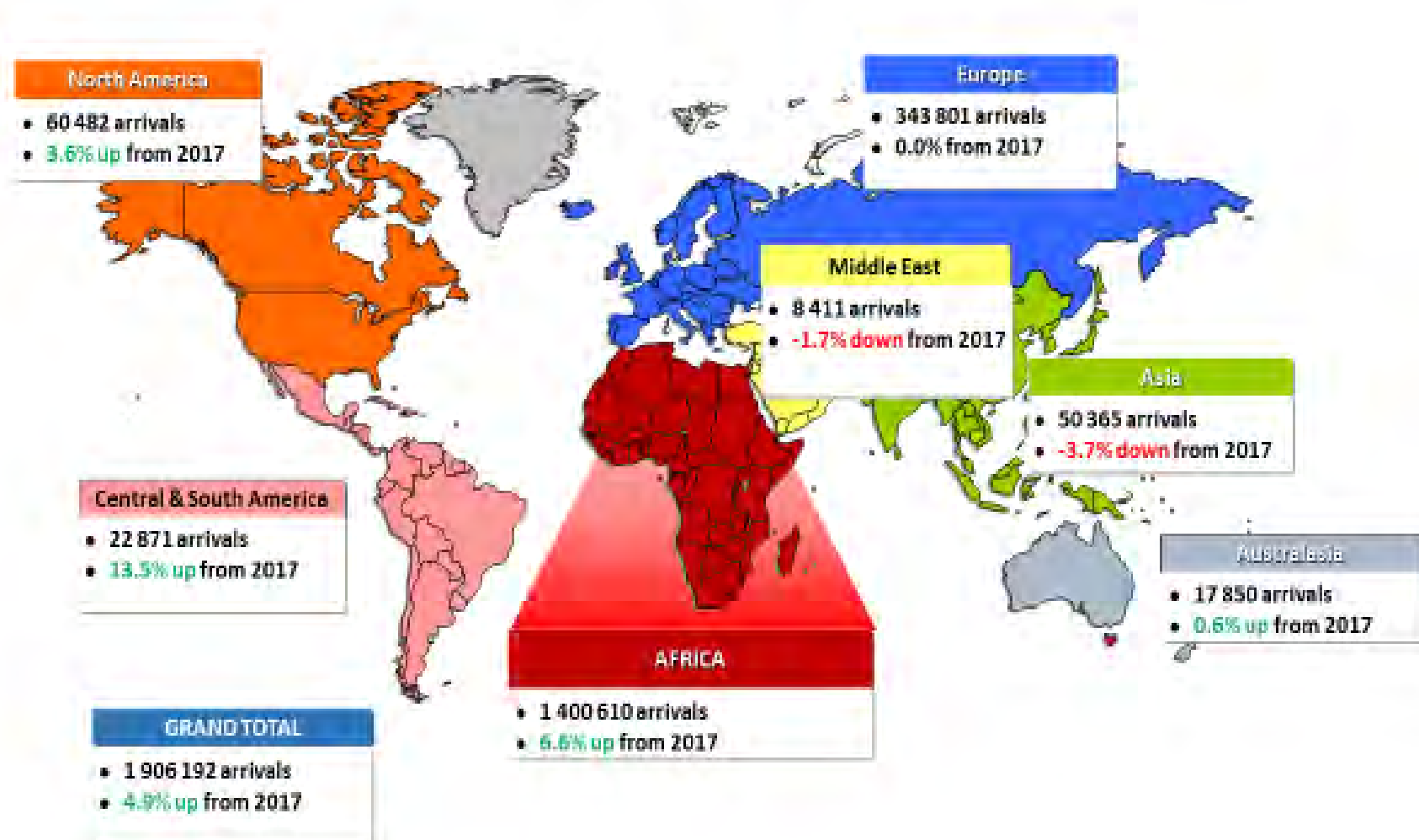
Table 4 below indicates rankings of top ten overseas source markets for the same period under review. Comparing Jan-Feb 2018 with Jan-Feb 2017, India recorded a significant growth of 18.9% and moved up from 10th position in 2017 to the 9th position in 2018. Switzerland moved down from 9th position in 2017 to the 10th position in 2018. China remained in the 6th position for both years even if arrivals from this country went down by -16,3% during this period. More analysis would be done to understand the decline recorded in China

Table 4: South Africa's Top 10 Overseas Source Markets: Jan-Feb 2018 compared to Jan-Feb 2017

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	99 435	1	102 155	-2.7
Germany	2	76 164	2	73 497	3.6
USA	3	48 889	3	46 770	4.5
France	4	34 381	4	35 043	-1.9
Netherlands	5	27 447	5	28 385	-3.3
China	6	17 651	6	21 093	-16.3
Australia	7	16 025	7	15 803	1.4
Sweden	8	15 046	8	14 713	2.3
India	9	14 659	10	12 328	18.9
Switzerland	10	13 290	9	13 315	-0.2

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

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



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

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Arrivals
UK 	99 435 -2.7% down from 2017 
Germany 	76 164 3.6% up from 2017 
USA 	48 889 4.5% up from 2017 
France 	34 381 -1.9% down from 2017 
Netherlands 	27 447 -3.3% down from 2017 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	419 104 9.7% up from 2017 
Lesotho 	361 958 4.5% up from 2017 
Mozambique 	255 592 8.3% up from 2017 
Swaziland 	133 192 0.6% up from 2017 
Botswana 	86 941 10.9% up from 2017 