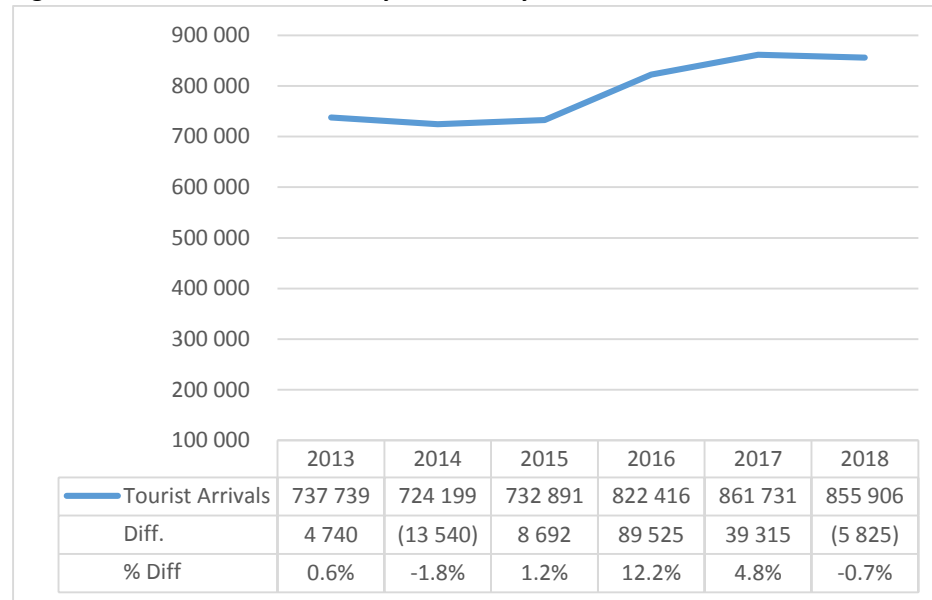


SUMMARY ANALYSIS OF TOURIST ARRIVALS: JULY 2018

TREND ANALYSIS: JULY 2013-JULY 2018

A total of 855 906 tourist arrivals was recorded in July 2018, which was a decrease of -0.7% (-5 825) compared to the same month in 2017. Figure 1 below indicates tourist arrivals for the period July 2013 to July 2018. Tourist arrivals decreased from 737 739 in 2013 to 724 199 in 2014, which was a decrease of about -1.8%. Tourist arrivals increased by 1.2% (8 692) in July 2015 compared to the same month in 2014. Comparing July 2016 with July 2015, there was a double digit growth of 12.2% (89 525) in tourist arrivals during this period. In 2017, tourist arrivals increased by 4.8% (39 315) moving from 822 416 in 2016 to 861 731 in 2017.

Figure 1: Total Tourist Arrivals July 2013 to July 2018



JULY 2018 COMPARED TO JULY 2017 BY REGION

Table 1 below indicates tourist arrivals by region for July 2018 compared to the same month in 2017. Arrivals from the overseas markets decreased by -0.3% (-661) during this period. The decline was driven by a decrease recorded in most of the overseas regions. Middle East recorded the highest decline (-19.8%), followed by Europe (-2.9%) and Australasia (-2.5%). Central and South America, Asia and North America were the only overseas regions that recorded a growth of 9.1%, 8.4% and 2.8% respectively in July 2018 compared to July 2017. Africa recorded a decline of -0.8% and this region remains the main source of tourist arrivals to the country, accounting for about 75.8% (648 805) of total arrivals during this month. Increase in arrivals from Asia was driven by a double digit growth of about 36% recorded in China during this period under review.

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

Region	July 2017	July 2018	Difference	% Difference
EUROPE	113 098	109 834	-3 264	-2.9%
NORTH AMERICA	40 686	41 816	1 130	2.8%
CENTRAL & SOUTH AMERICA	9 866	10 765	899	9.1%
AUSTRALASIA	11 513	11 226	-287	-2.5%
MIDDLE EAST	6 310	5 060	-1 250	-19.8%
ASIA	25 264	27 375	2 111	8.4%
TOTAL OVERSEAS	206 737	206 076	-661	-0.3%
TOTAL AFRICA	653 985	648 805	-5 180	-0.8%
Unspecified	1 009	1 025	16	1.6%
GRAND TOTAL	861 731	855 906	-5 825	-0.7%

JANUARY-JULY 2018 COMPARED TO JANUARY-JULY 2017

Arrivals for the period January-July 2018 compared to the same period in 2017 are indicated in Table 2 below. Total tourist arrivals (6 008 445) went up by 2.2% for the period January to July 2018 compared to arrivals recorded during the same period in 2017 (5 879 067). Total tourist arrivals from the overseas market declined by -1.5% (-23 246), which was influenced by a decline recorded in the Middle East (-11.3%), Asia (-2.9%), Europe (-2.3%) and Australasia (-1.4%). Tourist arrivals from Africa increased by 3.5 % (152 141) during the same period under review. Compared to other regions, the Central and South America region had the highest growth of 7.1% (4 487) during this period. The growth from this region was driven by an increase of about 27.6% of tourist arrivals from Argentina. Most countries within the Europe region experienced a decline in tourist arrivals with Portugal experiencing the highest decline of -20.5% for the period under review. The declining growth recorded in the Middle East was driven by Iran and Saudi Arabia with both countries having a decline of -28.0% and -26.6% respectively during the same period under review. The decline in Asia was driven by a decrease in tourist arrivals from most countries from this region including China and India with a decline of -2.2% and -3.3% respectively for the same period under review.

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

Region	Jan-July 2017	Jan-July 2018	Difference	% Difference
EUROPE	897 218	876 884	-20 334	-2.3%
NORTH AMERICA	252 183	254 847	2 664	1.1%
CENTRAL & SOUTH AMERICA	63 329	67 816	4 487	7.1%
AUSTRALASIA	72 378	71 330	-1 048	-1.4%
MIDDLE EAST	32 426	28 746	-3 680	-11.3%
ASIA	185 027	179 692	-5 335	-2.9%
TOTAL OVERSEAS	1 502 561	1 479 315	-23 246	-1.5%
TOTAL AFRICA	4 369 666	4 521 807	152 141	3.5%
Unspecified	6 840	7 323	483	7.1%
GRAND TOTAL	5 879 067	6 008 445	129 378	2.2%

Table 3 gives the rankings of the top ten African source markets for the periods January-July 2018 compared to January-July 2017. Most of the top ten African markets remained at the same position for the period under review except for Malawi and Zambia, which exchanged positions in 2018. Malawi improved its position from 8th to 7th while Zambia dropped from 7th to the 8th position in 2018. Angola and Nigeria also

swapped positions, with Angola moving to the 9th position and Nigeria to the 10th position for the period under review. Most countries from the top ten African source markets recorded an increase in tourist arrivals during this period except for Namibia (-3.8%), Zambia (-3.2%) and Nigeria (-0.6%). Angola had experienced the highest growth of 35.9%, which translates to additional 9 947 tourist arrivals from Angola during the period under review.

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

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	1 266 681	1	1 172 847	8.0%
Lesotho	2	1 093 341	2	1 082 127	1.0%
Mozambique	3	800 688	3	777 875	2.9%
Swaziland	4	494 318	4	492 662	0.3%
Botswana	5	363 240	5	357 067	1.7%
Namibia	6	110 883	6	115 312	-3.8%
Malawi	7	108 943	8	94 918	14.8%
Zambia	8	94 177	7	97 276	-3.2%
Angola	9	37 634	10	27 687	35.9%
Nigeria	10	29 406	9	29 579	-0.6%

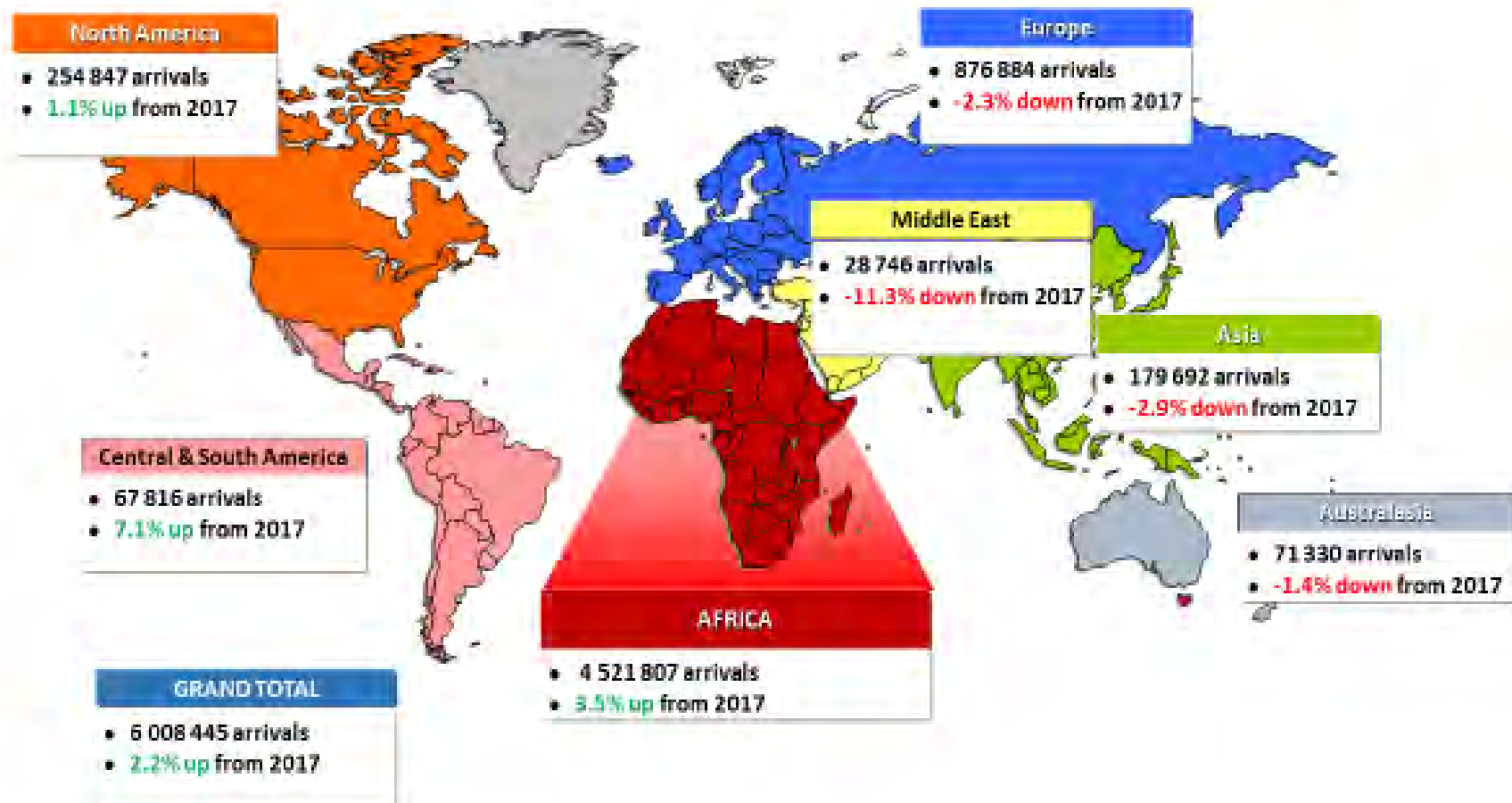
Table 4 shows rankings of top ten overseas source markets. Comparing Jan-July 2018 with Jan-July 2017, most top 10 overseas markets recorded a decline except for Brazil (4.3%), USA (1.2%) and Canada with (0.2%) respectively. Despite this decline, the top ten overseas markets remained the same in Jan-July 2017 and 2018 periods. UK remains the main source market from overseas even though this country recorded a declining growth of -5.0%.

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

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	246 063	1	259 039	-5.0
USA	2	218 277	2	215 680	1.2
Germany	3	176 740	3	178 328	-0.9
France	4	101 936	4	105 494	-3.4
The Netherlands	5	77 198	5	82 989	-7.0
Australia	6	63 130	6	63 105	0.0
India	7	57 219	7	59 157	-3.3
China	8	55 058	8	56 310	-2.2
Brazil	9	40 120	9	38 460	4.3
Canada	10	36 570	10	36 503	0.2

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

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



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

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Arrivals
UK 	264 063 -5.0% down from 2017 
USA 	218 277 1.2% up from 2017 
Germany 	176 740 -0.9% down from 2017 
France 	101 936 -3.4% down from 2017 
Netherlands 	77 198 -7.0% down from 2017 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	1 266 681 8.0% up from 2017 
Lesotho 	1 093 341 1.0% up from 2017 
Mozambique 	800 688 2.9% up from 2017 
Swaziland 	494 318 0.3% up from 2017 
Botswana 	363 240 1.7% up from 2017 