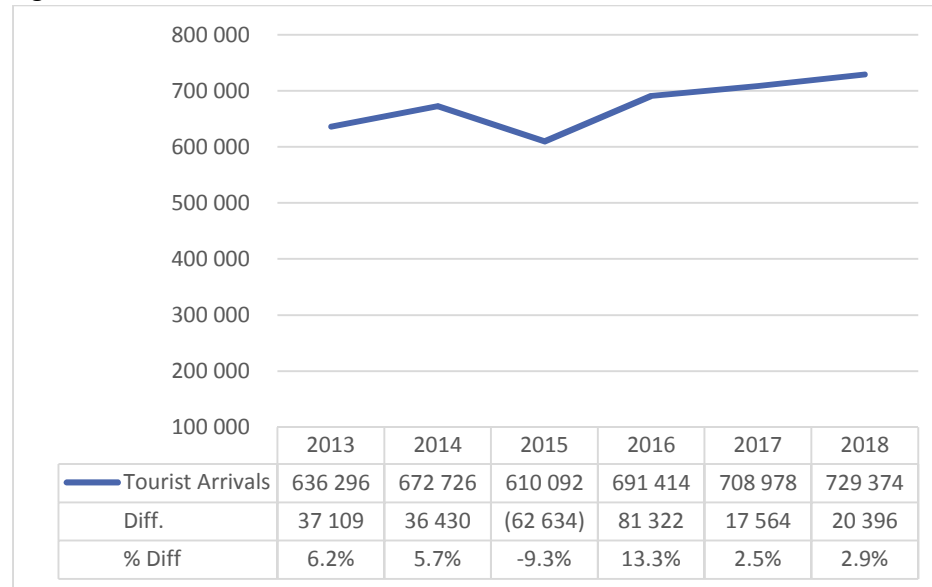


SUMMARY ANALYSIS OF TOURIST ARRIVALS: JUNE 2018

TREND ANALYSIS: JUNE 2013-JUNE 2018

A total of 729 374 tourist arrivals was recorded in June 2018, which was an increase of 2.9% (20 396) compared to the same month in 2017. Figure 1 indicates the number of tourist arrivals for the period June 2013 to June 2018. Tourist arrivals increased from 636 296 in 2013 to 672 726 in 2014, which was an increase of about 5.7%. Tourist arrivals declined by -9.3% (-62 634) in June 2015 compared to the same month in 2014. Comparing June 2016 with June 2015, there was a double digit growth of 13.3% (81 322) in tourist arrivals during this period. In 2017, tourist arrivals increased by 2.5% (17 564) moving from 691 414 in 2016 to 708 978 in 2017.

Figure 1: Total Tourist Arrivals June 2013 to June 2018



JUNE 2018 COMPARED TO JUNE 2017 BY REGION

Table 1 indicates tourist arrivals by region for June 2018 compared to the same month in 2017. Arrivals from the overseas markets decreased by -1.3% (-1 945) during this period. The decline was driven by a decrease recorded in most of the overseas regions. Australasia recorded the highest decline (-9.0%), followed by Central and South America Asia (-7.6%), Asia (-2.4%) and Europe (-0.4%). Middle East and North America were the only two overseas regions that recorded a growth of 3.6% and 1.1% respectively in June 2018 compared to June 2017. Africa recorded a growth of 4.0% and this region remains the main source of tourist arrivals to the country, accounting for about 79.3% (578 509) of total arrivals during this month.

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

Region	June 2017	June 2018	Difference	% Difference
EUROPE	64 316	64 080	-236	-0.4%
NORTH AMERICA	39 648	40 066	418	1.1%
CENTRAL & SOUTH AMERICA	8 081	7 467	-614	-7.6%
AUSTRALASIA	11 185	10 174	-1 011	-9.0%
MIDDLE EAST	3 220	3 337	117	3.6%
ASIA	25 286	24 667	-619	-2.4%
TOTAL OVERSEAS	151 736	149 791	-1 945	-1.3%
TOTAL AFRICA	556 287	578 509	22 222	4.0%
Unspecified	955	1 074	119	12.5%
GRAND TOTAL	708 978	729 374	20 396	2.9%

JANUARY-JUNE 2018 COMPARED TO JANUARY-JUNE 2017

Arrivals for the period January-June 2018 compared to the same period in 2017 are indicated in Table 2. Total tourist arrivals (5 152 539) went up by 2.7% for the period January to June 2018 compared to arrivals recorded during the same period in 2017 (5 017 336). Total tourist arrivals from the overseas market declined by -1.7% (-22 585), which was influenced by a decline recorded in the Middle East (-9.3%), Asia (-4.7%) and Europe (-2.2%). Tourist arrivals from Africa increased by 4.2 % (157 321) during the same period under review. Compared to other regions, the Central and South America region had the highest growth of 6.7% (3 588) during this period. The growth from this region was driven by an increase of about 29.6% of tourist arrivals from Argentina. Most countries within the Europe region experienced a decline in tourist arrivals with Portugal experiencing the highest decline of -21.6% 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 -26.5% and -16.8% 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 -7.8% and -3.5% respectively for the same period under review.

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

Region	Jan-June 2017	Jan-June 2018	Difference	% Difference
EUROPE	784 120	767 050	-17 070	-2.2%
NORTH AMERICA	211 497	213 031	1 534	0.7%
CENTRAL & SOUTH AMERICA	53 463	57 051	3 588	6.7%
AUSTRALASIA	60 865	60 104	-761	-1.3%
MIDDLE EAST	26 116	23 686	-2 430	-9.3%
ASIA	159 763	152 317	-7 446	-4.7%
TOTAL OVERSEAS	1 295 824	1 273 239	-22 585	-1.7%
TOTAL AFRICA	3 715 681	3 873 002	157 321	4.2%
Unspecified	5 831	6 298	467	8.0%
GRAND TOTAL	5 017 336	5 152 539	135 203	2.7%

Table 3 gives the ranking of the top ten African source markets for the periods January-June 2018 compared to January-June 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 (-4.1%), Zambia (-3.3%) and Nigeria (-2.4%). Angola had experienced the highest growth of 37.8%, which translates to additional 9 155 tourist arrivals from Angola during the period under review.

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

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	1 098 490	1	1 011 355	8.6%
Lesotho	2	927 863	2	913 047	1.6%
Mozambique	3	685 831	3	658 186	4.2%
Swaziland	4	422 185	4	417 946	1.0%
Botswana	5	311 497	5	300 700	3.6%
Namibia	6	95 414	6	99 479	-4.1%
Malawi	7	90 801	8	78 495	15.7%
Zambia	8	79 967	7	82 707	-3.3%
Angola	9	33 368	10	24 213	37.8%
Nigeria	10	24 991	9	25 606	-2.4%

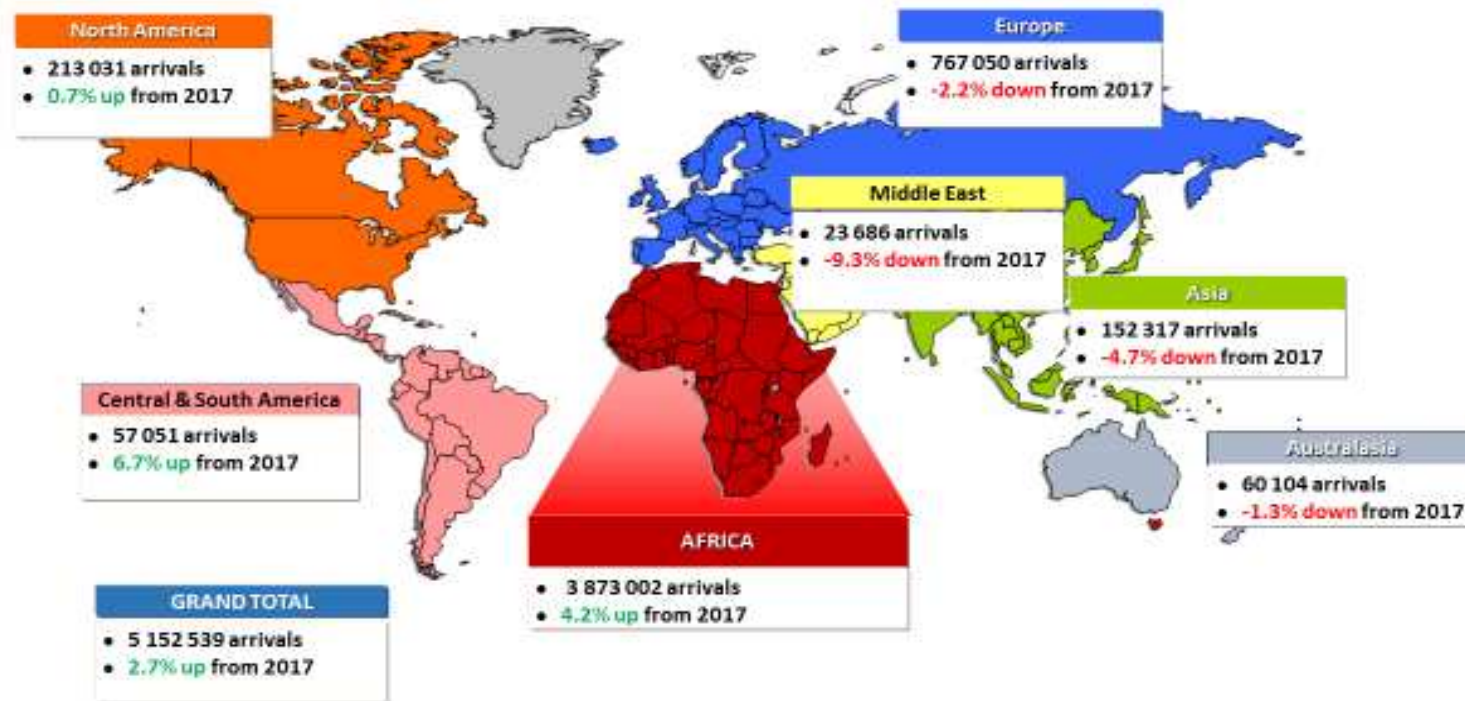
Table 4 shows the ranking of the top ten overseas source markets. Comparing Jan-June 2018 with Jan-June 2017, most top 10 overseas markets recorded a decline except for the USA (1.0%) and Brazil (2.7%). Despite this decline, the top eight overseas markets remained the same in Jan-June 2017 and 2018 periods. Canada dropped from 9th position in 2017 to 10th position in 2018. Brazil improved its position from 10th in Jan-June 2017 to 9th position during the same period in 2018. UK remains the main source market from overseas even though this country recorded a declining growth of -4.6%. The Department will be in contact with SA Tourism Insight Unit for further discussion to understand the decline in some of these key markets.

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

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	218 510	1	228 963	-4.6%
USA	2	180 717	2	179 002	1.0%
Germany	3	161 671	3	163 909	-1.4%
France	4	88 966	4	91 807	-3.1%
The Netherlands	5	59 574	5	63 157	-5.7%
Australia	6	53 209	6	53 514	-0.6%
India	7	50 015	7	51 842	-3.5%
China	8	45 361	8	49 173	-7.8%
Brazil	9	33 240	10	32 368	2.7%
Canada	10	32 314	9	32 495	-0.6%

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

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



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

TOP FIVE OVERSEAS
SOURCE MARKETS

Country	Arrivals
UK 	218 510 -4.6% down from 2017 
USA 	180 717 1.0% up from 2017 
Germany 	161 671 -1.4% down from 2017 
France 	88 966 -3.1% down from 2017 
Netherlands 	59 574 -5.7% down from 2017 

TOP FIVE AFRICA
SOURCE MARKETS

Country	Arrivals
Zimbabwe 	1 098 490 8.6% up from 2017 
Lesotho 	927 863 1.6% up from 2017 
Mozambique 	685 831 4.2% up from 2017 
Swaziland 	422 185 1.0% up from 2017 
Botswana 	311 497 3.6% up from 2017 