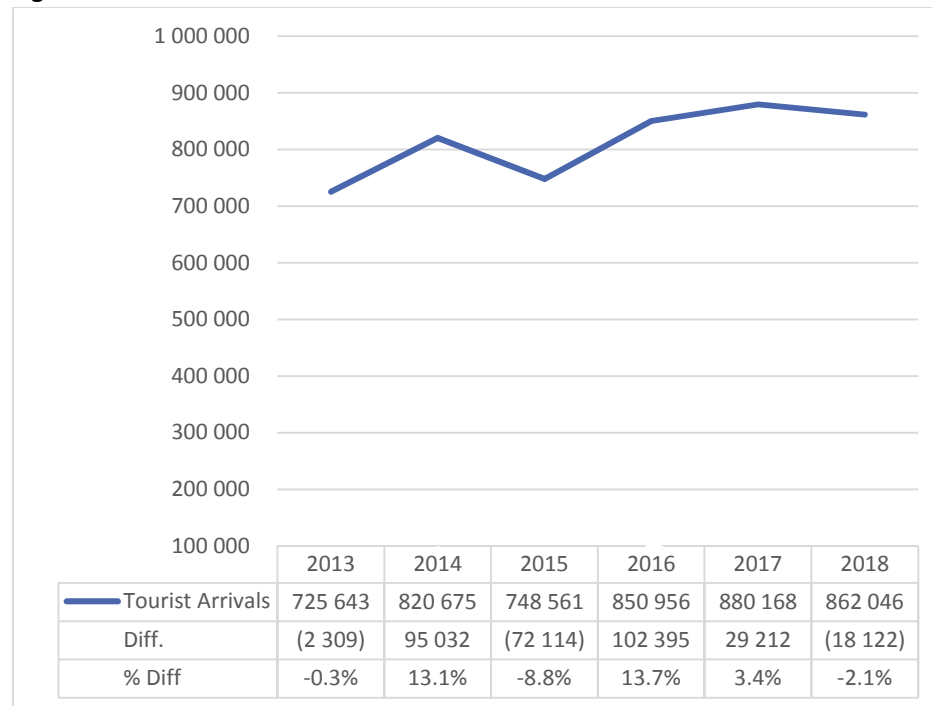


SUMMARY ANALYSIS OF TOURIST ARRIVALS: OCTOBER 2018

TREND ANALYSIS: OCTOBER 2013-OCTOBER 2018

A total of 862 046 tourist arrivals was recorded in October 2018, which was a decrease of 2.1% (-18 122) compared to the same month in 2017. Figure 1 indicates tourist arrivals for the period October 2013 to October 2018. Tourist arrivals increased from 725 643 in 2013 to 820 675 in 2014, which was a double digit increase of about 13.1%. Tourist arrivals decreased by -8.8% (-72 114) in October 2015 compared to the same month in 2014. Comparing October 2016 with October 2015, there was a growth of 13.7% (102 395) in tourist arrivals during this period. In 2017, tourist arrivals increased by 3.4% (29 212) moving from 850 956 in 2016 to 880 168 in 2017.

Figure 1: Total Tourist Arrivals October 2013 to October 2018



OCTOBER 2018 COMPARED TO OCTOBER 2017 BY REGION

Table 1 indicates tourist arrivals by region for October 2018 compared to the same month in 2017. Arrivals from overseas markets decreased by -4.9% (-13 080) during this period. Most of the overseas regions recorded a decline in tourist arrivals during the period under review, and these regions include Middle East (-25.4%), Europe (-5.9%), Australasia (-5.8%) and Asia (-5.3%). Central and South America recorded the highest increase (3.4%), followed by North America (0.6%). Africa recorded a decline of -0.8% (-4 913) and remains the main source of tourist arrivals to the country, accounting for about 70.4% (606 922) of total arrivals during October 2018.

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

| Region | October 2017 | October 2018 | Difference | % Difference |
|-------------------------|--------------|--------------|------------|--------------|
| Europe | 176 969 | 166 610 | -10 359 | -5,9 |
| North America | 36 277 | 36 500 | 223 | 0,6 |
| Central & South America | 9 341 | 9 655 | 314 | 3,4 |
| Australasia | 10 711 | 10 094 | -617 | -5,8 |
| Middle East | 4 214 | 3 142 | -1 072 | -25,4 |
| Asia | 29 513 | 27 944 | -1 569 | -5,3 |
| TOTAL OVERSEAS | 267 025 | 253 945 | -13 080 | -4,9 |
| Africa Land | 586 334 | 580 588 | -5 746 | -1,0 |
| Africa Air | 25 501 | 26 334 | 833 | 3,3 |
| TOTAL AFRICA | 611 835 | 606 922 | -4 913 | -0,8 |
| Unspecified | 1 308 | 1 179 | -129 | -9,9 |
| GRAND TOTAL | 880 168 | 862 046 | -18 122 | -2,1 |

JANUARY-OCTOBER 2018 COMPARED TO JANUARY-OCTOBER 2017

Tourist arrivals for the period January-October 2018 compared to the same period in 2017 are indicated in Table 2. Total tourist arrivals (8 589 778) went up by 1.7% for the period January to October 2018 compared to tourist arrivals recorded during the same period in 2017 (8 444 652). Total tourist arrivals from the overseas market declined by -1.6% (-35 394), which was influenced by a decrease in tourist arrivals from the Middle East (-12.0%), Asia (-2.9%), Europe (-2.5%) and Australasia (-1.8%). The declining growth recorded in the Middle East was driven by Iran and Saudi Arabia with both countries showing a decrease of -35.3% (-1 664) and -30.1% (-3 090) respectively. The decline in Asia was driven by a decrease in tourist arrivals from most countries from this region including India and China with a decline of -6.5% (-5 374) and -1.0% (-837) respectively. Compared to other regions, the Central and South America region had the highest growth of 9.7% (8 510) during this period. The growth from this region was driven by an increase of about 27.3% (3 569) of tourist arrivals from Argentina. North America recorded an increase of 1.2% for the period under review. Tourist arrivals from Africa increased by 2.9% (180 217) during the same period under review. Most countries within the Europe region recorded a decline in tourist arrivals with Portugal having the highest negative growth rate of -18.5% (-5 798).

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

| Region | Jan to Oct 2017 | Jan to Oct 2018 | Difference | % Difference |
|-------------------------|------------------|------------------|----------------|--------------|
| Europe | 1 312 714 | 1 279 983 | -32 731 | -2,5 |
| North America | 364 267 | 368 804 | 4 537 | 1,2 |
| Central & South America | 88 169 | 96 679 | 8 510 | 9,7 |
| Australasia | 110 357 | 108 329 | -2 028 | -1,8 |
| Middle East | 48 042 | 42 259 | -5 783 | -12,0 |
| Asia | 268 051 | 260 152 | -7 899 | -2,9 |
| TOTAL OVERSEAS | 2 191 600 | 2 156 206 | -35 394 | -1,6 |
| TOTAL AFRICA | 5 984 315 | 6 147 046 | 162 731 | 2,7 |
| Unspecified | 258 246 | 275 732 | 17 486 | 6,8 |
| GRAND TOTAL | 6 242 561 | 6 422 778 | 180 217 | 2,9 |

Table 3 gives the rankings of the top ten African source markets for the period January-October 2018 compared to January-October 2017. Most of the top ten African markets remained at the same position for the period under review. Malawi improved its position from 7th to 6th position while Namibia dropped from 6th to 7th position in 2018. Angola and Nigeria also swapped positions, with Angola moving to

the 9th position and Nigeria to the 10th position. Most countries from the top ten African source markets recorded an increase in tourist arrivals during this period except for Namibia (-4.4%), Zambia (-4.0%) and Swaziland (-0.3%). Angola had experienced the highest growth of 38.0%, which translates to additional 14 578 tourist arrivals from Angola during the period under review.

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

| Country | Rank - 2018 | Tourist Arrivals 2018 | Rank- 2017 | Tourist Arrivals 2017 | % Change from 2017 to 2018 |
|------------|-------------|-----------------------|------------|-----------------------|----------------------------|
| Zimbabwe | 1 | 1 806 042 | 1 | 1 676 751 | 7,7 |
| Lesotho | 2 | 1 484 941 | 2 | 1 484 030 | 0,1 |
| Mozambique | 3 | 1 134 559 | 3 | 1 114 087 | 1,8 |
| Swaziland | 4 | 720 496 | 4 | 722 536 | -0,3 |
| Botswana | 5 | 541 395 | 5 | 533 563 | 1,5 |
| Malawi | 6 | 163 892 | 7 | 144 601 | 13,3 |
| Namibia | 7 | 159 478 | 6 | 166 786 | -4,4 |
| Zambia | 8 | 136 243 | 8 | 141 961 | -4,0 |
| Angola | 9 | 52 917 | 10 | 42 551 | 38,0 |
| Nigeria | 10 | 43 686 | 9 | 38 339 | 2,7 |

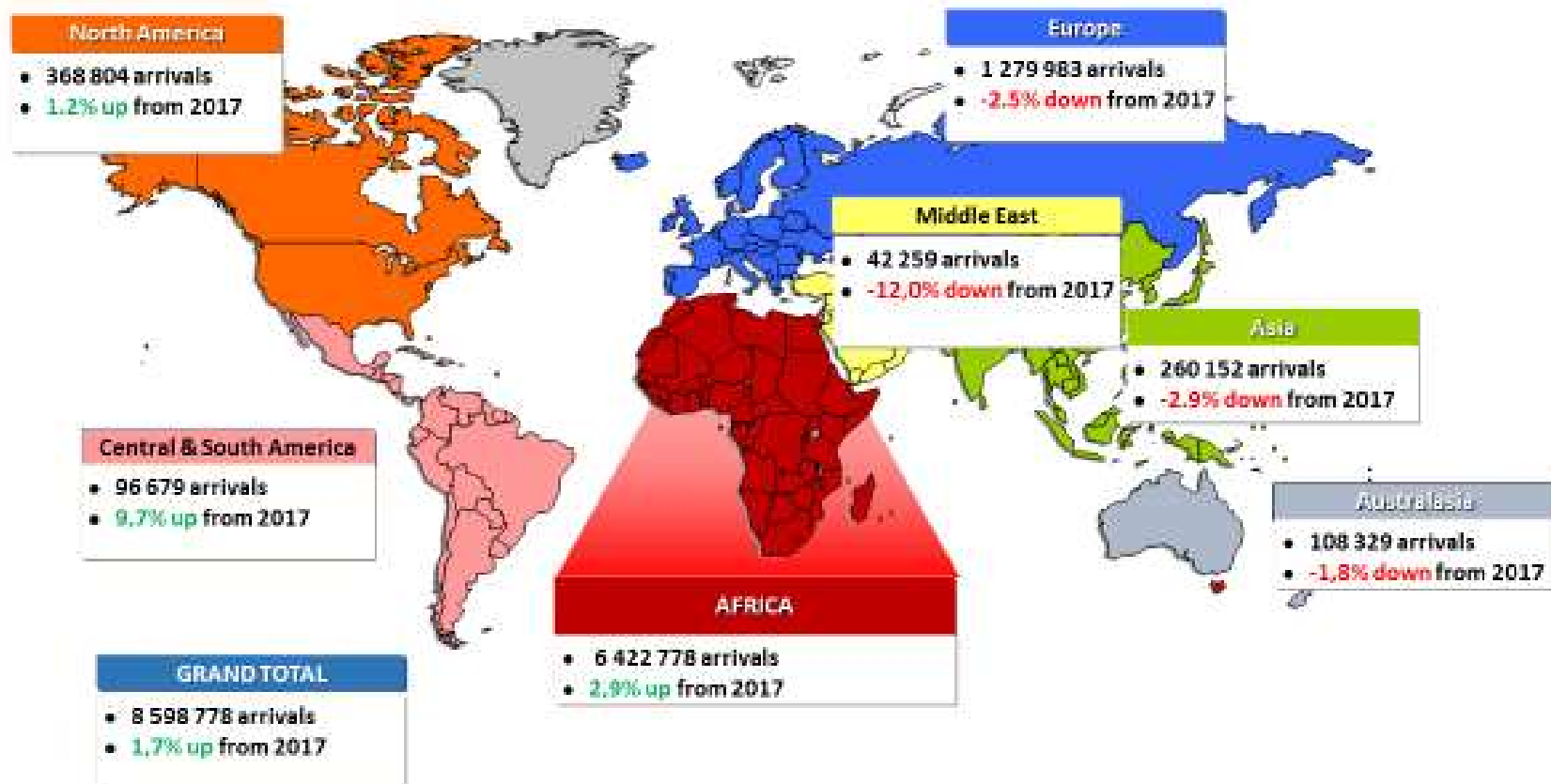
Table 4 shows the rankings of top ten overseas source markets. Comparing January-October 2018 with January-October 2017, most top 10 overseas markets recorded a decline except for Brazil (6.7%), USA (1.4%) and Canada (0.1%). The highest decline in tourist arrivals was from the Netherlands (-8.6%) followed by India (-6.5%) and France and the UK (-4.4% each). Despite this decline, all of the top ten overseas markets remained in their same position. UK remained the main source market from overseas even though this country recorded a declining growth of -4.4%.

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

| Country 2018 | Rank- 2018 | Tourist Arrivals 2018 | Rank- 2017 | Tourist Arrivals 2017 | % Change from 2017 to 2018 |
|-----------------|------------|-----------------------|------------|-----------------------|----------------------------|
| UK | 1 | 341 020 | 1 | 356 776 | -4,4 |
| USA | 2 | 314 957 | 2 | 310 458 | 1,4 |
| Germany | 3 | 267 050 | 3 | 271 093 | -1,5 |
| France | 4 | 152 498 | 4 | 159 447 | -4,4 |
| The Netherlands | 5 | 117 124 | 5 | 128 187 | -8,6 |
| Australia | 6 | 95 884 | 6 | 96 215 | -0,3 |
| China | 7 | 81 956 | 7 | 82 793 | -1,0 |
| India | 8 | 77 090 | 8 | 82 464 | -6,5 |
| Brazil | 9 | 57 837 | 9 | 54 219 | 6,7 |
| Canada | 10 | 53 847 | 10 | 53 809 | 0,1 |

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

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



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

TOP FIVE OVERSEAS
SOURCE MARKETS

| Country | Arrivals |
|---|--|
| UK  | 341 020 -4,4% down from 2017  |
| USA  | 314 957 1,4% up from 2017  |
| Germany  | 267 050 -1,5% down from 2017  |
| France  | 152 498 -4,4% down from 2017  |
| Netherlands  | 117 124 -8,6% down from 2017  |

TOP FIVE AFRICA
SOURCE MARKETS

| Country | Arrivals |
|--|---|
| Zimbabwe  | 1 806 042 7,7% up from 2017  |
| Lesotho  | 1 484 941 0,1% up from 2017  |
| Mozambique  | 1 134 559 1,8% up from 2017  |
| Swaziland  | 720 496 -0,3% down from 2017  |
| Botswana  | 541 395 1,5% up from 2017  |