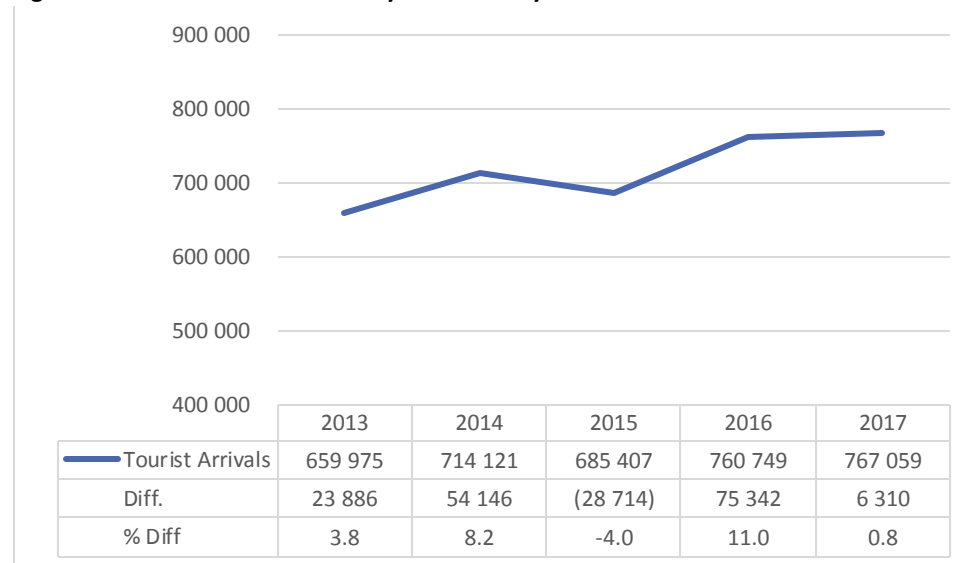


SUMMARY ANALYSIS OF TOURIST ARRIVALS: MAY 2017

TREND ANALYSIS: May 2013 - May 2017

A total of 767 059 tourist arrivals were recorded in May 2017, which was an increase of 0.8% (6 310) compared to the same month in 2016. Figure 1 below indicates tourist arrivals for the period May 2013 to May 2017. Tourist arrivals increased from 659 975 in 2013 to 714 121 in 2014, which was an increase of about 8.2%. Tourist arrivals however declined in May 2015 by 4.0% (28 714) compared to May 2014. Comparing May 2015 with May 2016, there was an increase in arrivals by 11.0% (75 342). May 2017 also recorded the highest number of tourist arrivals (767 059) when compared the same month of previous years under review.

Figure 1: Total Tourist Arrivals May 2013 to May 2017



May 2017 COMPARED TO MAY 2016 BY REGION

Table 1 below indicates tourist arrivals by region for May 2017 compared to the same month in 2016. Most overseas regions recorded positive growths in tourist arrivals during the period under review except for Asia and Middle East which recorded declining growths of 4.1% and 20.0% respectively. Africa region recorded a decline of 0.7% during the same period. However Africa continues to be the main source of tourist arrivals to the country accounting for about 78% of total arrivals during this month.

Table 1: Total Tourist Arrivals by Region May 2017 vs. May 2016

Region	May 2017	May 2016	Difference	% Difference
EUROPE	80 816	75 706	5 110	6.7%
NORTH AMERICA	39 821	35 872	3 949	11.0%
CENTRAL & SOUTH AMERICA	7 698	4 445	3 253	73.2%
AUSTRALASIA	9 814	9 319	495	5.3%
ASIA	30 349	31 635	-1 286	-4.1%
MIDDLE EAST	2 919	3 650	-731	-20.0%
TOTAL OVERSEAS	17 1417	16 0627	10 790	6.7%
TOTAL AFRICA	594 597	598 997	-4 400	-0.7%
Unspecified	1 045	1 125	-80	-7.1%
GRAND TOTAL	767 059	760 749	6 310	0.8%

JANUARY - MAY 2017 COMPARED TO JANUARY - MAY 2016

Arrivals for the period January-May 2017 compared to the same period in 2016 are indicated in Table 2 below. Tourist arrivals for the first five months of 2017 (4 308 358) recorded an increase of 0.7% compared to arrivals recorded during the same period in 2016 (4 277 673). Tourist arrivals from Africa decreased from 3 238 681 in 2016 to 3 159 394 in 2017, which was a decline of about 2.4%. Total tourist arrivals from overseas markets recorded a growth of 10.6% (109 720) during the same period under review.

Table 2: Total Tourist Arrivals by Region Jan-May 2017 vs. Jan-May 2016

Region	Jan-May 2017	Jan-May 2016	Difference	% Difference
EUROPE	719 804	647 374	72 430	11.2%
NORTH AMERICA	171 849	158 368	13 481	8.5%
CENTRAL & SOUTH AMERICA	45 382	23 710	21 672	91.4%
AUSTRALASIA	49 680	48 337	1 343	2.8%
ASIA	134 477	135 759	-1 282	-0.9%
MIDDLE EAST	22 896	20 820	2 076	10.0%
TOTAL OVERSEAS	1 144 088	1 034 368	109 720	10.6%
TOTAL AFRICA	3 159 394	3 238 681	-79 287	-2.4%
Unspecified	4 876	4 624	252	5.4%
GRAND TOTAL	4 308 358	4 277 673	30 685	0.7%

Table 3 gives rankings of top ten African source markets for the period January –May 2016 and January-May 2017. All of the top ten African markets remained at the same position for the period under review. Most of the top ten countries recorded a declining growth in tourist arrivals except for Lesotho, Malawi and Angola.

Table 3: South Africa's Top 10 African Source Markets: Jan-May 2017 vs. Jan-May 2016

Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
Zimbabwe	1	866 399	1	891578	-2.8%
Lesotho	2	777 870	2	772170	0.7%
Mozambique	3	554 903	3	589524	-5.9%
Swaziland	4	351 535	4	366751	-4.1%
Botswana	5	255 046	5	265488	-3.9%
Namibia	6	85 782	6	89645	-4.3%
Zambia	7	69 086	7	70413	-1.9%
Malawi	8	65 620	8	57368	14.4%
Nigeria	9	22 239	9	27902	-20.3%
Angola	10	21 400	10	19185	11.5%

Table 4 below shows rankings of top ten overseas source markets for the same period under review. Comparing Jan-May 2017 with Jan to May 2016, most of the top ten overseas source markets remained at the same position except for Australia (moved higher from 8th to 6th position), China (dropped from 6th to 7th position) and India (dropped from 7th to 8th position). During this period, most of the top 10 overseas markets recorded an increase in tourist arrivals except for China which declined by 13.4% (6 695).

Table 4: South Africa's Top 10 Overseas Source Markets: Jan-May 2017 compared to Jan-May 2016

Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
UK	1	20 9891	1	204 709	2.5%
Germany	2	153 232	2	133 467	14.8%
USA	3	142 847	3	131 971	8.2%
France	4	84 316	4	62 261	35.4%
Netherlands	5	58 163	5	51 217	13.6%
Australia	6	43 627	8	40 237	8.4%
China	7	43 154	6	49 849	-13.4%
India	8	42 968	7	41 792	2.8%
Canada	9	29 002	9	26 397	9.9%
Switzerland	10	25 899	10	22 669	14.2%

Understanding the growth of Central and South America for the period Jan-May 2017

Figure 2 and 3 below show that tourist arrivals from Central and South America increased from 23 710 during Jan-May 2016 to 45 382 during the same period in 2017, this was an increase of 91.4%. Month-to-month analysis of this region shows that the growth has been consistent from Jan-May 2017 with an average growth rate of 91.2% during this period. It has been noted that Central and South America is now growing faster than other regions, however it is still the 5th source region from overseas markets. Looking at the 2017 trends, arrivals from this region has almost doubled and is now closer to Australasia which is the 4th source region from the overseas markets.

Figure 2: Tourist arrivals from Central and South America and Australasia: Jan-May 2016

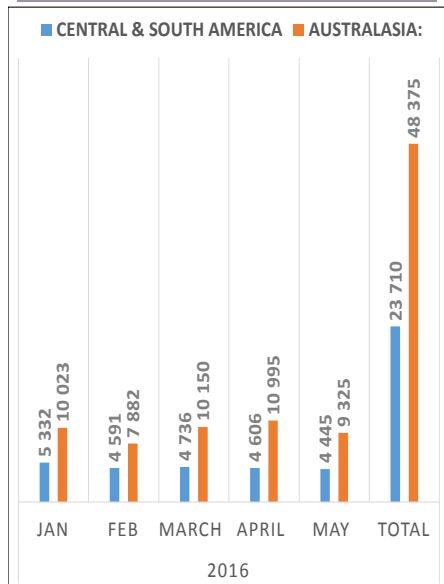
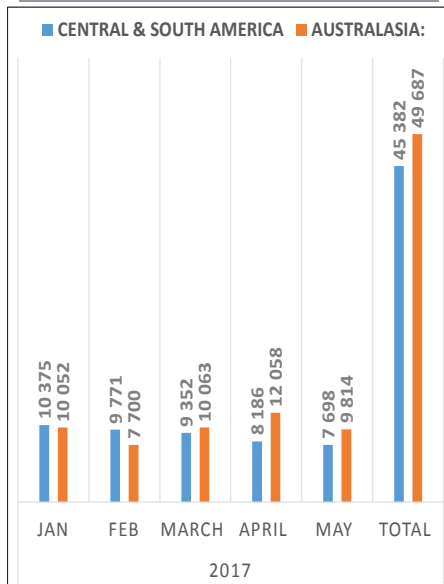


Figure 3: Tourist arrivals from Central and South America and Australasia: Jan-May 2017



The growth in Central and South America for the period Jan-May 2017 compared to Jan-May 2016 was largely driven by Argentina, Brazil and Chile which can be seen in figure 4 and 5. During the first five months of 2017, tourist arrivals from Chile increased from 1 238 to 3 044 recording the highest growth of 145.9%. Brazil arrivals reordered (26 658) was more than twice as much in 2016 (12 095) which was a growth of 120.4% for the period under review. Argentina increased from 4 376 (Jan-May 2016) to 8 501 (Jan-May 2017) with a growth of 94.3%.

Figure 4: Growth in Tourist arrivals for key markets within the Central and South American region: Jan-May 2017 vs. Jan-May 2016 (%)

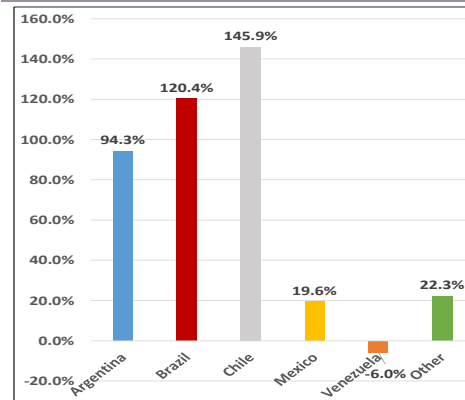
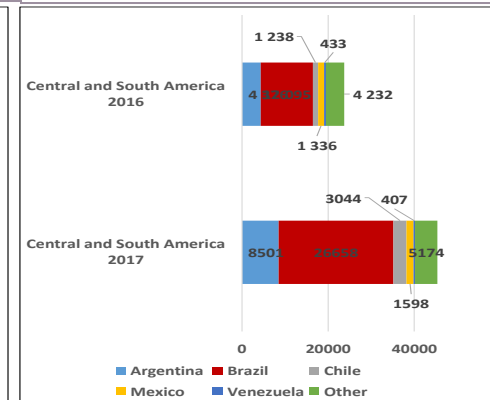


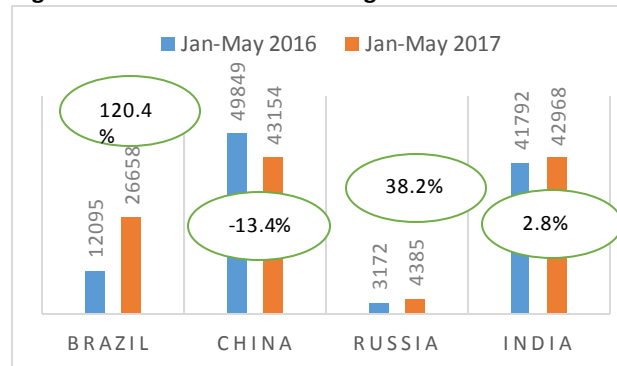
Figure 5: Tourist arrivals for key markets within the Central and South American region: Jan-May 2017 vs. Jan-May 2016 (volume)



Tourist arrivals from BRICS region: Jan-May 2017 compared to Jan-May 2016

When tourist arrivals from BRICS countries are analysed, it was noted that Brazil is now growing much faster than other BRICS countries. In 2016, China was growing faster however from Feb-May 2017, China has been declining with an average double digit growth of 22.7% during these months. Brazil recorded a growth of 120.4% during the first five months of 2017 followed by Russia with a growth of 38.2% while China is the only country recording a declining growth of 13.4% for the same period under review. However, China continues to be the main source market from the BRICS.

Figure 5: Tourist Arrivals and % growth from BRICS countries for Jan-May 2017












TOTAL TOURIST ARRIVALS TOP TEN OVERSEAS AND AFRICA MARKETS: JAN-May 17 COMPARED TO JAN-May 2016.

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Jan –May 2017 Arrivals
UK 	209 891 2,5% up from 2016 
Germany 	153 232 14,8% up from 2016 
USA 	142 847 8,2% up from 2016 
France 	84 316 35,4% up from 2016 
Netherlands 	58 163 13,6% up from 2016 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Jan –May 2017 Arrivals
Zimbabwe 	866 399 2,8% down from 2016 
Lesotho 	777 870 0,7% up from 2016 
Mozambique 	554 930 5,9% down from 2016 
Swaziland 	351 535 4,1% down from 2016 
Botswana 	255 046 3,9% down from 2016 

TOTAL TOURIST ARRIVALS BY REGION JAN-May 17 COMPARED TO JAN-May 2016.

Figure below indicates a snap view of tourist arrivals to South Africa by regions for the period January to May 2017.

