SUMMARY ANALYSIS OF TOURIST ARRIVALS: JULY 2017

TREND ANALYSIS: JULY 2013 - JULY 2017

A total of 861,731 tourist arrivals were recorded in July 2017, which was an increase of 4.8% (39,315) compared to the same month in 2016. Figure 1 below indicates tourist arrivals for the period July 2013 to July 2017. Tourist arrivals decreased from 737,739 in 2013 to 724,199 in 2014, which was a decrease of about 1.8%. Tourist arrivals however increased in July 2015 by 1.2% (8,692) compared to July 2014. Comparing July 2016 with July 2015, there was a significant increase in tourist arrivals by 12.2% (89,525), while July 2017 also increased by 4.8% (39,315) when compared with the same month of previous year.

Figure 1: Total Tourist Arrivals July 2013 to July 2017

JULY 2017 COMPARED TO JULY 2016 BY REGION

Table 1 below indicates tourist arrivals by region for July 2017 compared to the same month in 2016. Most overseas regions recorded a negative growth in tourist arrivals during the period under review except for Europe, Central & South America. Africa recorded a growth of 5.4% and is the main source of tourist arrivals to the country accounting for about 76% (635,985) of total arrivals during this month.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>July 2017</th>
<th>July 2016</th>
<th>Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUROPE</td>
<td>113,098</td>
<td>107,971</td>
<td>5,127</td>
<td>4.7</td>
</tr>
<tr>
<td>NORTH AMERICA</td>
<td>40,686</td>
<td>41,069</td>
<td>-383</td>
<td>-0.9</td>
</tr>
<tr>
<td>CENTRAL &amp; SOUTH AMERICA</td>
<td>9,866</td>
<td>6,029</td>
<td>3,837</td>
<td>63.6</td>
</tr>
<tr>
<td>AUSTRALASIA</td>
<td>11,513</td>
<td>11,757</td>
<td>-244</td>
<td>-2.1</td>
</tr>
<tr>
<td>ASIA</td>
<td>25,264</td>
<td>27,691</td>
<td>-2,427</td>
<td>-8.8</td>
</tr>
<tr>
<td>MIDDLE EAST</td>
<td>6,310</td>
<td>6,384</td>
<td>-74</td>
<td>-1.2</td>
</tr>
<tr>
<td>TOTAL OVERSEAS</td>
<td>206,737</td>
<td>200,901</td>
<td>5,836</td>
<td>2.9</td>
</tr>
<tr>
<td>AFRICA AIR</td>
<td>25,816</td>
<td>28,334</td>
<td>-2,518</td>
<td>-8.9</td>
</tr>
<tr>
<td>AFRICA LAND</td>
<td>628,169</td>
<td>592,120</td>
<td>36,049</td>
<td>6.1</td>
</tr>
<tr>
<td>TOTAL AFRICA</td>
<td>653,985</td>
<td>620,454</td>
<td>33,531</td>
<td>5.4</td>
</tr>
<tr>
<td>Unspecified</td>
<td>1,009</td>
<td>1,061</td>
<td>-52</td>
<td>-4.9</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>861,731</td>
<td>822,416</td>
<td>39,315</td>
<td>4.8</td>
</tr>
</tbody>
</table>
Arrivals for the period January-July 2017 compared to the same period in 2016 are indicated in Table 2 below. Tourist arrivals for the first seven months of 2017 (5 879 067) recorded an increase of 1.5% compared to arrivals recorded during the same period in 2016 (5 791 503). Tourist arrivals from Africa decreased from 4 413 946 in 2016 to 4 369 666 in 2017, which was a decline of about 1.0% (44 280). Total tourist arrivals from overseas grew by 9.6%(131 512) during the same period under review. Compared to other sub-regions, the Central and South America region had the highest growth of 89.6% (29 929) for the period under review.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Jan-July 2017</th>
<th>Jan-July 2016</th>
<th>Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUROPE</td>
<td>897 218</td>
<td>814 463</td>
<td>82 755</td>
<td>10.2</td>
</tr>
<tr>
<td>NORTH AMERICA</td>
<td>252 183</td>
<td>234 068</td>
<td>18 115</td>
<td>7.7</td>
</tr>
<tr>
<td>CENTRAL &amp; SOUTH AMERICA</td>
<td>63 329</td>
<td>33 400</td>
<td>29 929</td>
<td>89.6</td>
</tr>
<tr>
<td>AUSTRALASIA</td>
<td>72 378</td>
<td>70 408</td>
<td>1 970</td>
<td>2.8</td>
</tr>
<tr>
<td>ASIA</td>
<td>185 027</td>
<td>189 306</td>
<td>-4 279</td>
<td>-2.3</td>
</tr>
<tr>
<td>MIDDLE EAST</td>
<td>32 426</td>
<td>29 404</td>
<td>3 022</td>
<td>10.3</td>
</tr>
<tr>
<td>TOTAL OVERSEAS</td>
<td>1 502 561</td>
<td>1 371 049</td>
<td>131 512</td>
<td>9.6</td>
</tr>
<tr>
<td>AFRICA AIR</td>
<td>179 582</td>
<td>186 240</td>
<td>-6 658</td>
<td>-3.6</td>
</tr>
<tr>
<td>AFRICA LAND</td>
<td>4 190 084</td>
<td>4 227 706</td>
<td>-37 622</td>
<td>-0.9</td>
</tr>
<tr>
<td>TOTAL AFRICA</td>
<td>4 369 666</td>
<td>4 413 946</td>
<td>-44 280</td>
<td>-1.0</td>
</tr>
<tr>
<td>Unspecified</td>
<td>6 840</td>
<td>6 508</td>
<td>332</td>
<td>5.1</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>5 879 067</td>
<td>5 791 503</td>
<td>87 564</td>
<td>1.5</td>
</tr>
</tbody>
</table>

Table 3 gives rankings of top ten African source markets for the period January-July 2016 and January-July 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 for the period under review.

### Table 3: South Africa’s Top 10 African Source Markets: Jan-July 2017 vs. Jan-July 2016

<table>
<thead>
<tr>
<th>Country</th>
<th>RANK-2017</th>
<th>Tourist Arrivals 2017</th>
<th>RANK-2016</th>
<th>Tourist Arrivals 2016</th>
<th>% Change from 2016 to 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zimbabwe</td>
<td>1</td>
<td>1172847</td>
<td>1</td>
<td>1182219</td>
<td>-0.8</td>
</tr>
<tr>
<td>Lesotho</td>
<td>2</td>
<td>1082127</td>
<td>2</td>
<td>1076964</td>
<td>0.5</td>
</tr>
<tr>
<td>Mozambique</td>
<td>3</td>
<td>777875</td>
<td>3</td>
<td>779008</td>
<td>-0.1</td>
</tr>
<tr>
<td>Swaziland</td>
<td>4</td>
<td>492662</td>
<td>4</td>
<td>513563</td>
<td>-4.1</td>
</tr>
<tr>
<td>Botswana</td>
<td>5</td>
<td>357067</td>
<td>5</td>
<td>374352</td>
<td>-4.6</td>
</tr>
<tr>
<td>Namibia</td>
<td>6</td>
<td>115312</td>
<td>6</td>
<td>120067</td>
<td>-4.0</td>
</tr>
<tr>
<td>Zambia</td>
<td>7</td>
<td>97276</td>
<td>7</td>
<td>99329</td>
<td>-2.1</td>
</tr>
<tr>
<td>Malawi</td>
<td>8</td>
<td>94918</td>
<td>8</td>
<td>82204</td>
<td>15.5</td>
</tr>
<tr>
<td>Nigeria</td>
<td>9</td>
<td>29579</td>
<td>9</td>
<td>38942</td>
<td>-24.0</td>
</tr>
<tr>
<td>Angola</td>
<td>10</td>
<td>27687</td>
<td>10</td>
<td>24628</td>
<td>12.4</td>
</tr>
</tbody>
</table>

Table 4 below shows rankings of top ten overseas source markets for the same period under review. Comparing Jan-July 2017 with Jan-July 2016, Brazil recorded a significant growth of 119.5%(20 936) and moved from 15th position in 2016 to the 9th position in 2017. Australia moved higher as well from 8th position in 2016 to 6th position in 2017 recording a growth of 8%(4 660). China however dropped from the 6th position in 2016 to 8th position in 2017 with a declining growth of 15.9%(10 613).

### Table 4: South Africa’s Top 10 Overseas Source Markets: Jan-July 2017 compared to Jan-July 2016

<table>
<thead>
<tr>
<th>Country</th>
<th>RANK-2017</th>
<th>Tourist Arrivals 2017</th>
<th>RANK-2016</th>
<th>Tourist Arrivals 2016</th>
<th>% Change from 2016 to 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>1</td>
<td>259039</td>
<td>1</td>
<td>253879</td>
<td>2.0</td>
</tr>
<tr>
<td>USA</td>
<td>2</td>
<td>215680</td>
<td>2</td>
<td>199853</td>
<td>7.9</td>
</tr>
<tr>
<td>Germany</td>
<td>3</td>
<td>178328</td>
<td>3</td>
<td>155371</td>
<td>14.8</td>
</tr>
<tr>
<td>France</td>
<td>4</td>
<td>105494</td>
<td>4</td>
<td>80368</td>
<td>31.3</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>5</td>
<td>82989</td>
<td>5</td>
<td>73796</td>
<td>12.5</td>
</tr>
<tr>
<td>Australia</td>
<td>6</td>
<td>63105</td>
<td>8</td>
<td>58445</td>
<td>8.0</td>
</tr>
<tr>
<td>India</td>
<td>7</td>
<td>59157</td>
<td>7</td>
<td>58876</td>
<td>0.5</td>
</tr>
<tr>
<td>China</td>
<td>8</td>
<td>56310</td>
<td>6</td>
<td>66923</td>
<td>-15.9</td>
</tr>
<tr>
<td>Brazil</td>
<td>9</td>
<td>38460</td>
<td>15</td>
<td>17524</td>
<td>119.5</td>
</tr>
<tr>
<td>Canada</td>
<td>10</td>
<td>36503</td>
<td>9</td>
<td>34215</td>
<td>6.7</td>
</tr>
</tbody>
</table>
TOTAL TOURIST ARRIVALS TOP TEN OVERSEAS AND AFRICA MARKETS: JANUARY-JULY 17 COMPARED TO JANUARY-JULY 2016.

### Top Five Overseas Source Markets

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>259,039</td>
<td>2% up from 2016</td>
</tr>
<tr>
<td>USA</td>
<td>215,680</td>
<td>7.9% up from 2016</td>
</tr>
<tr>
<td>Germany</td>
<td>178,328</td>
<td>14.8% up from 2016</td>
</tr>
<tr>
<td>France</td>
<td>105,494</td>
<td>31.3% up from 2016</td>
</tr>
<tr>
<td>Netherlands</td>
<td>82,989</td>
<td>12.5% up from 2016</td>
</tr>
</tbody>
</table>

### Top Five Africa Source Markets

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Zimbabwe</td>
<td>1,172,847</td>
<td>-0.8% down from 2016</td>
</tr>
<tr>
<td>Lesotho</td>
<td>1,082,127</td>
<td>0.5% up from 2016</td>
</tr>
<tr>
<td>Mozambique</td>
<td>777,875</td>
<td>-0.1% down from 2016</td>
</tr>
<tr>
<td>Swaziland</td>
<td>492,662</td>
<td>-4.1% down from 2016</td>
</tr>
<tr>
<td>Botswana</td>
<td>357,067</td>
<td>-4.6% down from 2016</td>
</tr>
</tbody>
</table>
TOTAL TOURIST ARRIVALS BY REGION JANUARY-JULY 2017 COMPARED TO JANUARY-JULY 2016.

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