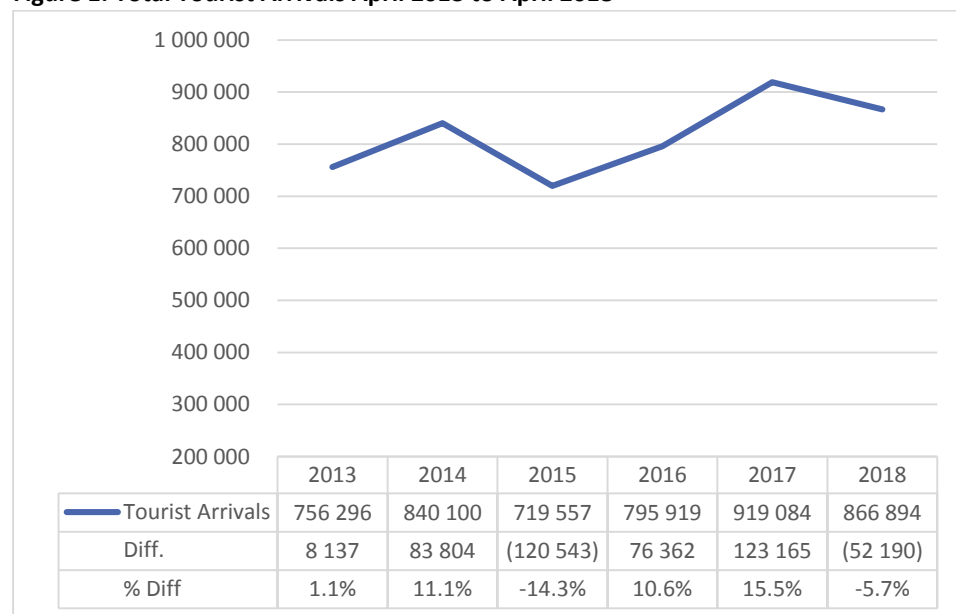


SUMMARY ANALYSIS OF TOURIST ARRIVALS: APRIL 2018

TREND ANALYSIS: APRIL 2013 APRIL 2018

A total of 866 894 tourist arrivals was recorded in April 2018, which was a decrease of about -5.7% (52 190) compared to the same month in 2017. Figure 1 below indicates tourist arrivals for the period April 2013 to April 2018. Tourist arrivals increased from 756 296 in 2013 to 840 100 in 2014, which was an increase of about 11.1%. Tourist arrivals declined in April 2015 by -14.3% (-120 543) compared to April 2014. Comparing April 2016 with April 2015, there was an increase in tourist arrivals by 10.6% (76 362). The highest increase in arrivals, which was a double digit growth of 15.5%, was recorded in April 2017 compared to April 2016. The percentage change fluctuation in tourist arrivals during March and April each year is affected by the timing of the Easter holiday, which falls within March or April. In 2017, the Easter holiday was in the middle of April, while in 2018 it was from end of March, which might have contributed to the drop (-5.7%) in tourist arrivals seen in April this year.

Figure 1: Total Tourist Arrivals April 2013 to April 2018



APRIL 2018 COMPARED TO APRIL 2017 BY REGION

Table 1 below indicates tourist arrivals by region for April 2018 compared to the same month in 2017. Arrivals from the overseas markets decreased by -12.6% (28 038) during this period. The decline was driven by a decrease experienced in most of the overseas regions. The Middle East recorded the highest decline (-28.7%), followed by Europe (-17.6%), Australasia (-7.6%) and Asia (-5.8%). The Central and South America was the only overseas region that recorded a growth of 2.2% in April 2018 compared to April 2017. Africa also recorded a decline of -3.5%, however the continent remains the main source of tourist arrivals to the country, accounting for about 77.54% (671 834) of total arrivals during this month.

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

Region	April 2017	April 2018	Difference	% Difference
EUROPE	137 988	113 734	24 254	-17.6%
NORTH AMERICA	33 641	33 332	309	-0.9%
CENTRAL & SOUTH AMERICA	8 186	8 362	176	2.2%
AUSTRALASIA	12 058	11 136	922	-7.6%
MIDDLE EAST	4 220	3 009	1 211	-28.7%
ASIA	25 962	24 444	1 518	-5.8%
TOTAL OVERSEAS	222 055	194 017	28 038	-12.6%
TOTAL AFRICA	695 970	671 834	24 136	-3.5%
Unspecified	1 059	1 043	16	-1.5%
GRAND TOTAL	919 084	866 894	-52 190	-5.7%

JANUARY-APRIL 2018 COMPARED TO JANUARY-APRIL 2017

Arrivals for the period January-April 2018 compared to the same period in 2017 are indicated in Table 2 below. Total tourist arrivals (3 655 835) went up by 3.2% for the period January to April 2018 compared to arrivals recorded during the same period in 2017 (3 541 299). Total tourist arrivals from overseas declined by -1.5% (-14 360), which was influenced by Europe (-2.2%), Middle East (-11.0%) and Asia (-4.7%). Tourist arrivals from Africa increased by 5.0% (128 710) during the same period under review. Compared to other regions, the Central and South America region had the highest growth of 10.6% (4 003) during this period. The growth from this region was driven by an increase of about 36.1% recorded from Argentina. The declining growth recorded in Middle East was driven by Iran with the highest decline of -27.8% in this region. Asia's regional decline was driven by China with the highest declining growth of -12,7%.

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

Region	Jan-April 2017	Jan-April 2018	Difference	% Difference
EUROPE	638 988	624 905	-14 083	-2.2%
NORTH AMERICA	132 028	134 374	2 346	1.8%
CENTRAL & SOUTH AMERICA	37 684	41 687	4 003	10.6%
AUSTRALASIA	39 866	40 361	495	1.2%
MIDDLE EAST	19 977	17 782	-2 195	-11.0%
ASIA	104 128	99 202	-4 926	-4.7%
TOTAL OVERSEAS	972 671	958 311	-14 360	-1.5%
TOTAL AFRICA	2 564 797	2 693 507	128 710	5.0%
Unspecified	3 831	4 017	186	4.9%
GRAND TOTAL	3 541 299	3 655 835	114 536	3.2%

Table 3 gives rankings of top ten African source markets for the periods January-April 2018 and January-April 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 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 (-1.8%), Zambia (-3.0%) and Nigeria (-6.4%). Angola had experienced the highest growth of 39.9%, which translates to additional 7 098 tourist arrivals from Angola during the period under review.

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

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	778 920	1	711 390	9.5%
Lesotho	2	652 364	2	636 054	2.6%
Mozambique	3	466 208	3	444 071	5.0%
Swaziland	4	284 881	4	281 068	1.4%
Botswana	5	216 924	5	209 123	3.7%
Namibia	6	65 352	6	66 573	-1.8%
Malawi	7	62 160	8	52 716	17.9%
Zambia	8	53 152	7	54 802	-3.0%
Angola	9	24 874	10	17 776	39.9%
Nigeria	10	17 143	9	18 308	-6.4%

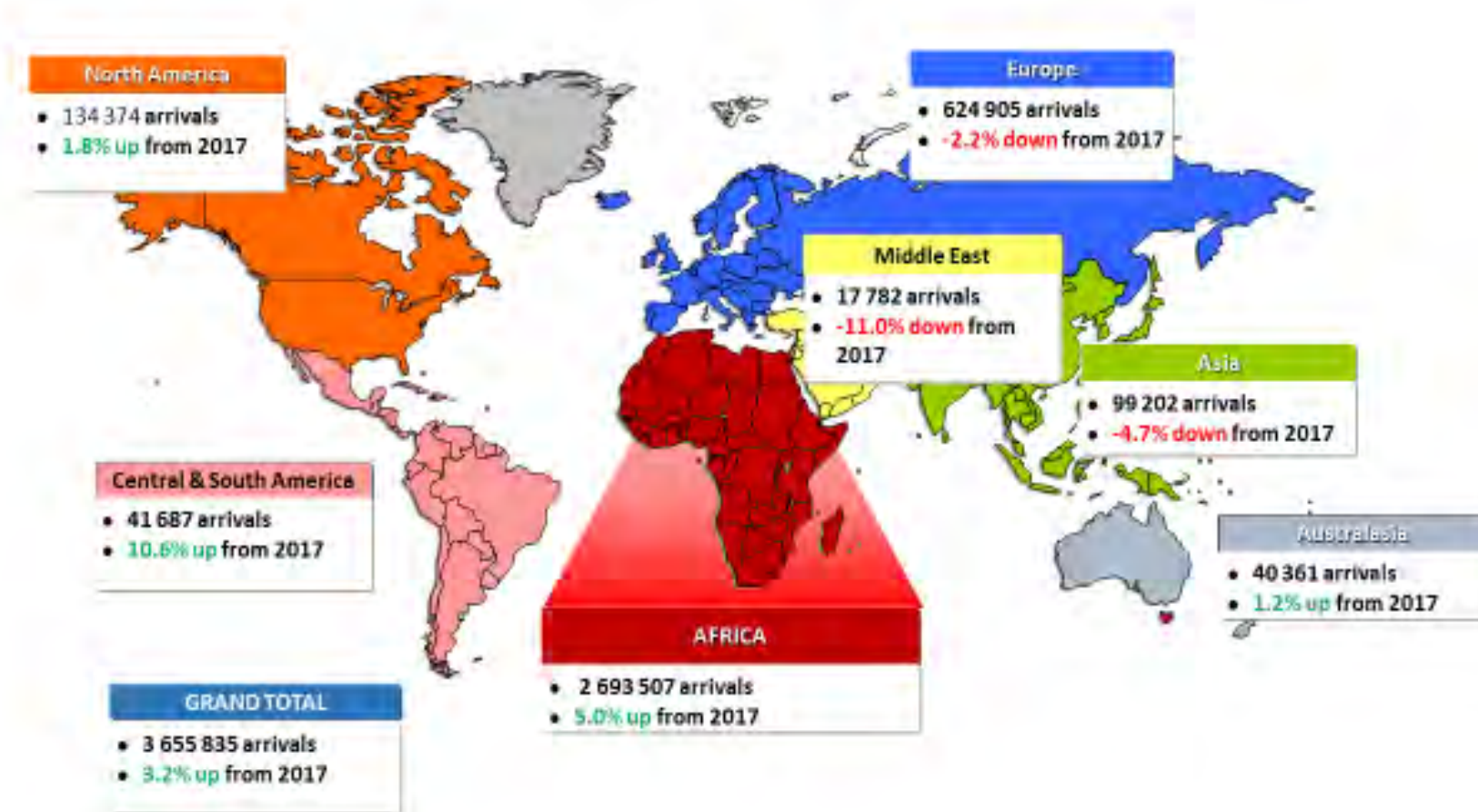
Table 4 below shows rankings of top ten overseas source markets. Comparing Jan-April 2018 with Jan-April 2017, most top 10 overseas markets recorded a decline except for the USA (2.1%), Australia (2.1%), India (2.6%) and Canada (0.1%). Despite this decline, the top five overseas markets remained the same in Jan-April 2017 and 2018 periods. China dropped from 6th position in 2017 to 7th position in 2018, with a decline of -12.7% (-4 670) during this period. Australia improved its position from 7th in Jan-April 2017 to 6th position in the same period in 2018. UK remains the main source market from overseas even though this country recorded a declining growth of -4.9%.

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

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	178 314	1	187 569	-4.9%
Germany	2	138 747	2	13 8976	-0.2%
USA	3	110 193	3	107 882	2.1%
France	4	69 300	4	72 223	-4.0%
Netherlands	5	48 120	5	51 413	-6.4%
Australia	6	35 714	7	34 972	2.1%
China	7	31 960	6	36 630	-12.7%
India	8	29 080	8	28 340	2.6%
Canada	9	24 181	9	24 146	0.1%
Switzerland	10	22 966	10	23 648	-2.9%











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

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



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

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Arrivals
UK 	178 314 -4.9% down from 2017 
Germany 	138 747 -0.2% down from 2017 
USA 	110 193 2.1% up from 2017 
France 	69 300 -4.0% down from 2017 
Netherlands 	48 120 -6.4% down from 2017 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	778 920 9.5% up from 2017 
Lesotho 	652 364 2.6% up from 2017 
Mozambique 	466 208 5.0% up from 2017 
Swaziland 	284 881 1.4% up from 2017 
Botswana 	216 924 3.7% up from 2017 