SUMMARY ANALYSIS OF TOURIST ARRIVALS: DECEMBER 2017

TREND ANALYSIS: DECEMBER 2013 - DECEMBER 2017
A total of 991,579 tourist arrivals were recorded in December 2017, which was an increase of 2.7% (26,472) compared to the same month in 2016. Figure 1 below indicates tourist arrivals for the period December 2013 to December 2017. Tourist arrivals increased from 881,226 in 2013 to 934,699 in 2014, which was an increase of about 6.1%. Tourist arrivals however decreased in December 2015 by -4.5% (-41,979) compared to December 2014. Comparing December 2016 with December 2015, there was an increase in tourist arrivals by 8.1% (72,387), while December 2017 increased slightly by 2.7% (26,472) when compared with the same month of the previous year.

DECEMBER 2017 COMPARED TO DECEMBER 2016 BY REGION
Table 1 below indicates tourist arrivals by region for December 2017 compared to the same month in 2016. Most overseas regions recorded a positive growth in tourist arrivals during the period under review except for Europe, Australasia and Asia which recorded decline of -0.5%, -6.3% and -4.0% respectively. Africa had a growth of 3.5% and remains the main source of tourist arrivals to the country, accounting for about 73.5% (728,850) of total arrivals during this month.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>December 2016</th>
<th>December 2017</th>
<th>Difference</th>
<th>%Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUROPE</td>
<td>168,611</td>
<td>167,732</td>
<td>-879</td>
<td>-0.5%</td>
</tr>
<tr>
<td>NORTH AMERICA</td>
<td>38,148</td>
<td>41,116</td>
<td>2,968</td>
<td>7.8%</td>
</tr>
<tr>
<td>CENTRAL &amp; SOUTH AMERICA</td>
<td>9,314</td>
<td>11,132</td>
<td>1,818</td>
<td>19.5%</td>
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<tr>
<td>AUSTRALASIA</td>
<td>160,21</td>
<td>15,005</td>
<td>-1,016</td>
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<tr>
<td>MIDDLE EAST</td>
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<td>TOTAL OVERSEAS</td>
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<td>261,728</td>
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<td>0.8%</td>
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<tr>
<td>AFRICA LAND</td>
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<tr>
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Figure 1: Total Tourist Arrivals December 2013 to December 2017

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JANUARY - DECEMBER 2017 COMPARED TO JANUARY - DECEMBER 2016

Arrivals for the period January-December 2017 compared to the same period in 2016 are indicated in Table 2 below. Total tourist arrivals for the period January to December 2017 (10 285 197) went up by 2.4% compared to arrivals recorded during the same period in 2016 (10 044 163). Total tourist arrivals from overseas grew by 7.2% (182 087) while arrivals from Africa increased by a slight growth of 0.8% (57 830) in 2017 compared to 2016. Compared to other sub-regions, the Central and South America region had the highest growth of 59.3% (40 036) for the period under review. The growth in this region was mainly driven by Argentina (56.3%), Chile (77.5%) and Brazil (74.7%). However, Brazil was leading with regards to volume with about 67 797 more tourists arriving in 2017 compared to 2016.

Table 1 gives rankings of top ten overseas source markets for the period January-December 2017 compared to January-December 2016. Most of the top ten overseas markets remained at the same position for the period under review except for Malawi and Zambia which exchanged positions. Some of the top ten countries recorded a declining growth and Nigeria recorded the highest declining growth of -22.4%. Zimbabwe, Lesotho and Mozambique remain the top source markets from the continent although Lesotho recorded a declining growth of -0.6%.

Figure below indicates a snap view of tourist arrivals to South Africa by regions for the period January to December 2017.
TOTAL TOURIST ARRIVALS BY REGION JANUARY-DECEMBER 17 COMPARED TO JANUARY-DECEMBER 2016

### TOP FIVE OVERSEAS SOURCE MARKETS

<table>
<thead>
<tr>
<th>Country</th>
<th>Arrivals</th>
<th>Percentage</th>
<th>Change 2017 vs 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>447,901</td>
<td>0.0%</td>
<td>up from 2016</td>
</tr>
<tr>
<td>USA</td>
<td>370,747</td>
<td>7.5%</td>
<td>up from 2016</td>
</tr>
<tr>
<td>Germany</td>
<td>349,211</td>
<td>12.0%</td>
<td>up from 2016</td>
</tr>
<tr>
<td>France</td>
<td>196,165</td>
<td>27.2%</td>
<td>up from 2016</td>
</tr>
<tr>
<td>Netherlands</td>
<td>159,621</td>
<td>7.9%</td>
<td>up from 2016</td>
</tr>
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<td>Zimbabwe</td>
<td>2,039,932</td>
<td>0.5%</td>
<td>up from 2016</td>
</tr>
<tr>
<td>Lesotho</td>
<td>1,747,211</td>
<td>0.6%</td>
<td>down from 2016</td>
</tr>
<tr>
<td>Mozambique</td>
<td>1,339,245</td>
<td>5.6%</td>
<td>up from 2016</td>
</tr>
<tr>
<td>Swaziland</td>
<td>876,992</td>
<td>1.9%</td>
<td>down from 2016</td>
</tr>
<tr>
<td>Botswana</td>
<td>681,379</td>
<td>0.2%</td>
<td>up from 2016</td>
</tr>
</tbody>
</table>