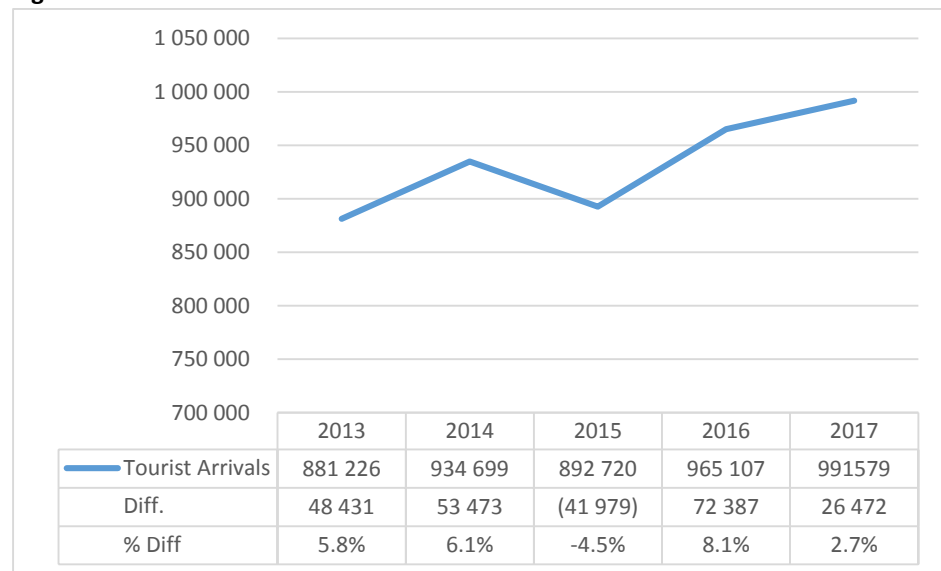


SUMMARY ANALYSIS OF TOURIST ARRIVALS: DECEMBER 2017

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.

Figure 1: Total Tourist Arrivals December 2013 to December 2017



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

Region	December 2016	December 2017	Difference	%Difference
EUROPE	168 611	167 732	-879	-0.5%
NORTH AMERICA	38 148	41 116	2 968	7.8%
CENTRAL & SOUTH AMERICA	9314	11 132	1 818	19.5%
AUSTRALASIA	16021	15 005	-1 016	-6.3%
MIDDLE EAST	3522	3 609	87	2.5%
ASIA	24 108	23134	-974	-4.0%
TOTAL OVERSEAS	259 724	261 728	2 004	0.8%
AFRICA LAND	673 198	696 482	23 284	3.5%
AFRICA AIR	31 099	32 368	1 269	4.1%
TOTAL AFRICA	704 297	728 850	24 553	3.5%
Unspecified	1086	1 001	-85	-7.8%
GRAND TOTAL	965 107	991 579	26 472	2.7%

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. Asia recorded a declining growth of -3,3% which was driven by China which recorded a declining growth of -17% during the same period under review.

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

Region	Jan-Dec 2016	Jan-Dec 2017	Difference	% Difference
EUROPE	1 544 026	1 660 848	116 822	7.6%
NORTH AMERICA	406 192	437 903	31 711	7.8%
CENTRAL & SOUTH AMERICA	67 546	107 582	40 036	59.3%
AUSTRALASIA	131 856	133 713	1 857	1.4%
MIDDLE EAST	53 536	55 906	2 370	4.4%
ASIA	327 890	317 181	-10 709	-3.3%
TOTAL OVERSEAS	2 531 046	2 713 133	182 087	7.2%
AFRICA LAND	7 171 091	7 241 553	70 462	1.0%
AFRICA AIR	330 421	317 789	-12 632	-3.8%
TOTAL AFRICA	7 501 512	7 559 342	57 830	0.8%
Unspecified	11 605	12 722	1 117	9.6%
GRAND TOTAL	10 044 163	10 285 197	241 034	2.4%

Table 3 gives rankings of top ten African source markets for the period January-December 2016 and January-December 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. 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%.

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

Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
Zimbabwe	1	2 039 932	1	2 028 881	0.5
Lesotho	2	1 747 211	2	1 757 058	-0.6
Mozambique	3	1 339 245	3	1 268 258	5.6
Swaziland	4	876 992	4	893 618	-1.9
Botswana	5	681 379	5	679 828	0.2
Namibia	6	208 747	6	214 664	-2.8
Malawi	7	175 014	8	154 017	13.6
Zambia	8	173 033	7	174 767	-1.0
Nigeria	9	50 921	9	65 599	-22.4
Angola	10	49 299	10	43 608	13.1

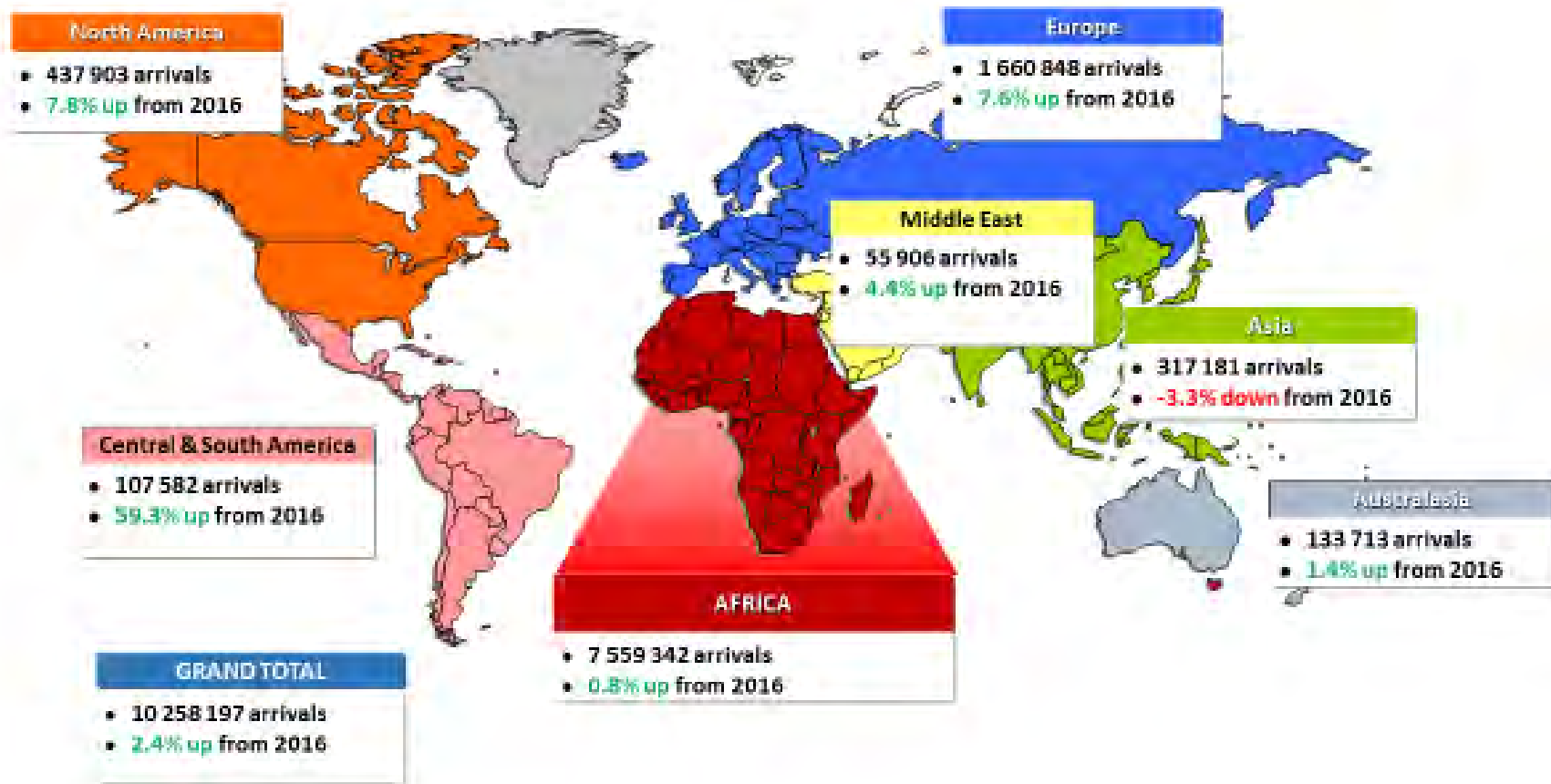
Table 4 below shows rankings of top ten overseas source markets for the same period under review. Comparing Jan-Dec 2017 with Jan-Dec 2016, Brazil recorded a significant growth of 74.7% and moved up from 15th position in 2016 to the 9th position in 2017. This country overtook Italy which fell off the top ten and Canada which moved from position 9 to 10. Australia moved from 7th position in 2016 to the 6th position in 2017 overtaking China which moved from the 6th position to the 8th position during the same period under review. It should be noted that India became the main source market from Asia overtaking China as well by taking the 7th position. The poor performance of China was due to the declining growth of -17,0% recorded during the period under review. More analysis would be done to understand the abnormal growth from Brazil and the decline recorded in China, however, SAT indicated that the decline in China is related to the perception on safety and security issues as Chinese tourists were once robbed when leaving the OR Tambo Airport.

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

Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
UK	1	447 901	1	447 840	0.01
USA	2	370 747	2	345 013	7.5
Germany	3	349 211	3	311 832	12.0
France	4	196 165	4	154 226	27.2
Netherlands	5	159 621	5	147 973	7.9
Australia	6	116 257	7	109 146	6.5
India	7	97 921	8	95 377	2.7
China	8	97 069	6	116 946	-17.0
Brazil	9	67 797	15	38814	74.7
Canada	10	67 156	9	61 179	9.8











TOTAL TOURIST ARRIVALS TOP TEN OVERSEAS AND AFRICA MARKETS: JANUARY-DECEMBER 2017 COMPARED TO JANUARY-DECEMBER 2016.

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 JANANUARY-DECEMBER 2016

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Arrivals
UK 	447 901 0.0% up from 2016 
USA 	370 747 7.5% up from 2016 
Germany 	349 211 12.0% up from 2016 
France 	196 165 27.2% up from 2016 
Netherlands 	159 621 7.9% up from 2016 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	2 039 932 0.5% up from 2016 
Lesotho 	1 747 211 0.6% down from 2016 
Mozambique 	1 339 245 5.6% up from 2016 
Swaziland 	876 992 1.9% down from 2016 
Botswana 	681 379 0.2% up from 2016 