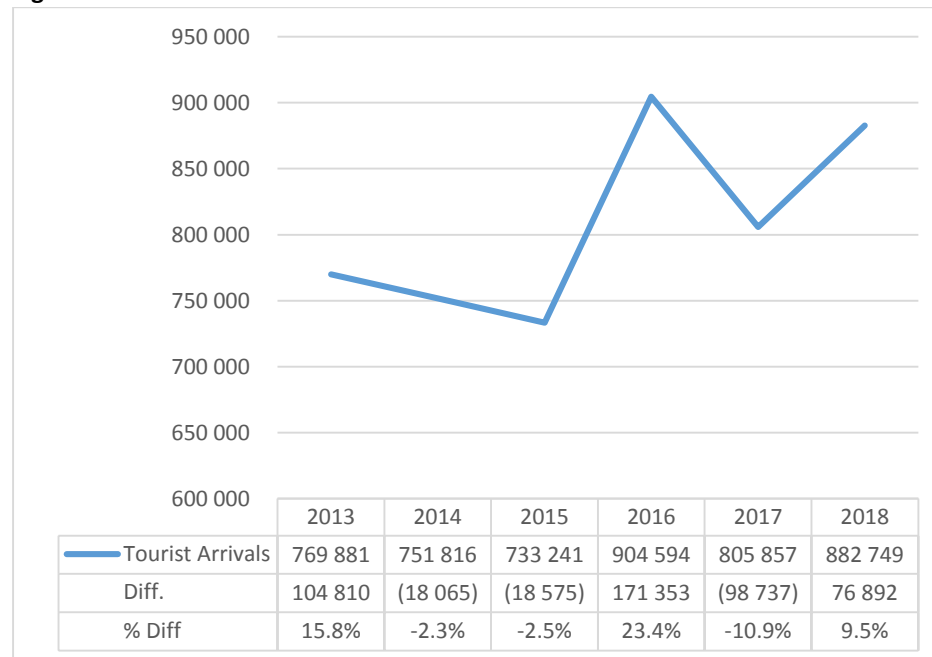


SUMMARY ANALYSIS OF TOURIST ARRIVALS: MARCH 2018

TREND ANALYSIS: MARCH 2013 - MARCH 2018

A total of 882 749 tourist arrivals was recorded in March 2018, which was an increase of 9.5% (76 892) compared to the same month in 2017. Figure 1 below indicates tourist arrivals for the period March 2013 to March 2018. Tourist arrivals decreased from 769 881 in 2013 to 751 816 in 2014, which was a decrease of about -2.3%. Tourist arrivals continued to decline in March 2015 by -2.5% (-18 575) compared to March 2014. The highest increase in arrivals was recorded in March 2016 compared to March 2015 with a double digit growth of 23,4% recorded during this period. The fluctuation of percentage change of tourist arrivals during this month might be affected by whether Easter holidays fall within the month of March or April. In 2018, Easter holidays fell end of March while in 2017 they were in the middle of April.

Figure 1: Total Tourist Arrivals March 2013 to March 2018



MARCH 2018 COMPARED TO MARCH 2017 BY REGION

Table 1 below indicates tourist arrivals by region for March 2018 compared to the same month in 2017. Arrivals from overseas markets increased by 4.4% during this period. The decline from overseas markets was recorded in Middle East and Asia with -11.6% and -5.7% respectively. Major markets from Asia are China and India and both recorded a declining growth of -16,2% and -7,6% respectively. Africa had a growth of 11.9% and the continent remains the main source of tourist arrivals to the country, accounting for about 70.4% (621 063) of total arrivals during this month.

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

| Region | March 2017 | March 2018 | Difference | %Difference |
|-------------------------|------------|------------|------------|-------------|
| EUROPE | 157 174 | 167 370 | 10 196 | 6.5% |
| NORTH AMERICA | 39 985 | 40 560 | 575 | 1.4% |
| CENTRAL & SOUTH AMERICA | 9 352 | 10 454 | 1 102 | 11.8% |
| AUSTRALASIA | 10 063 | 11 375 | 1 312 | 13.0% |
| MIDDLE EAST | 7 197 | 6 362 | -835 | -11.6% |
| ASIA | 25 870 | 24 393 | -1 477 | -5.7% |
| TOTAL OVERSEAS | 249 641 | 260 514 | 10 873 | 4.4% |
| TOTAL AFRICA | 555 213 | 621 063 | 65 850 | 11.9% |
| Unspecified | 1 003 | 1 172 | 169 | 16.8% |
| GRAND TOTAL | 805 857 | 882 749 | 76 892 | 9.5% |

JANUARY - MARCH 2018 COMPARED TO JANUARY – MARCH 2017

Arrivals for the period January-March 2018 compared to the same period in 2017 are indicated in Table 2 below. Total tourist arrivals for the period January to March 2018 (2 788 941) went up by 6.4% compared to arrivals recorded during the same period in 2017 (2 622 215). Total tourist arrivals from overseas grew by 1.8% (13 678) while arrivals from Africa increased by 8.2% (152 846) during the first three months of 2018 compared to the same period in 2017. Compared to other regions, the Central and South America region had the highest growth of 13.0% (3 827) for the period under review. The growth from this region was driven by a growth of about 43,3% recorded from Argentina. Middle East and Asia recorded a declining growth of -6.2% and -4.4% respectively during the same period under review. The declining growth recorded in Asia was driven by China with the highest declining growth of -16,3% recorded from this country.

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

| Region | Jan -Mar 2017 | Jan -Mar 2018 | Difference | % Difference |
|-------------------------|---------------|---------------|------------|--------------|
| EUROPE | 501 000 | 511 171 | 10 171 | 2.0% |
| NORTH AMERICA | 98 387 | 101 042 | 2 655 | 2.7% |
| CENTRAL & SOUTH AMERICA | 29 498 | 33 325 | 3 827 | 13.0% |
| AUSTRALASIA | 27 808 | 29 225 | 1 417 | 5.1% |
| MIDDLE EAST | 15 757 | 14 773 | -984 | -6.2% |
| ASIA | 78 166 | 74 758 | -3 408 | -4.4% |
| TOTAL OVERSEAS | 750 616 | 764 294 | 13 678 | 1.8% |
| TOTAL AFRICA | 1 868 827 | 2 021 673 | 152 846 | 8.2% |
| Unspecified | 2 772 | 2 974 | 202 | 7.3% |
| GRAND TOTAL | 2 622 215 | 2 788 941 | 166 726 | 6.4% |

Table 3 gives rankings of top ten African source markets for the period January-March 2018 and January-March 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 moved up to the 7th position and Zambia moved down to the 8th position in 2018. Most countries from the top ten recorded an increase in tourist arrivals during this period except for Nigeria and Zambia, which declined by -4.3% and -1.7% respectively.

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

| Country 2018 | RANK-2018 | Tourist Arrivals 2018 | RANK-2017 | TOURIST ARRIVALS 2017 | % Change from 2017 to 2018 |
|--------------|-----------|-----------------------|-----------|-----------------------|----------------------------|
| Zimbabwe | 1 | 579 353 | 1 | 522 647 | 10.8% |
| Lesotho | 2 | 488 375 | 2 | 476 879 | 2.4% |
| Mozambique | 3 | 356 725 | 3 | 336 474 | 6.0% |
| Swaziland | 4 | 210 522 | 4 | 197 032 | 6.8% |
| Botswana | 5 | 166 388 | 5 | 127 553 | 30.4% |
| Namibia | 6 | 48 138 | 6 | 45 965 | 4.7% |
| Malawi | 7 | 47 386 | 8 | 39 859 | 18.9% |
| Zambia | 8 | 39 284 | 7 | 39 964 | -1.7% |
| Angola | 9 | 20 025 | 9 | 14 186 | 41.2% |
| Nigeria | 10 | 12 663 | 10 | 13 235 | -4.3% |

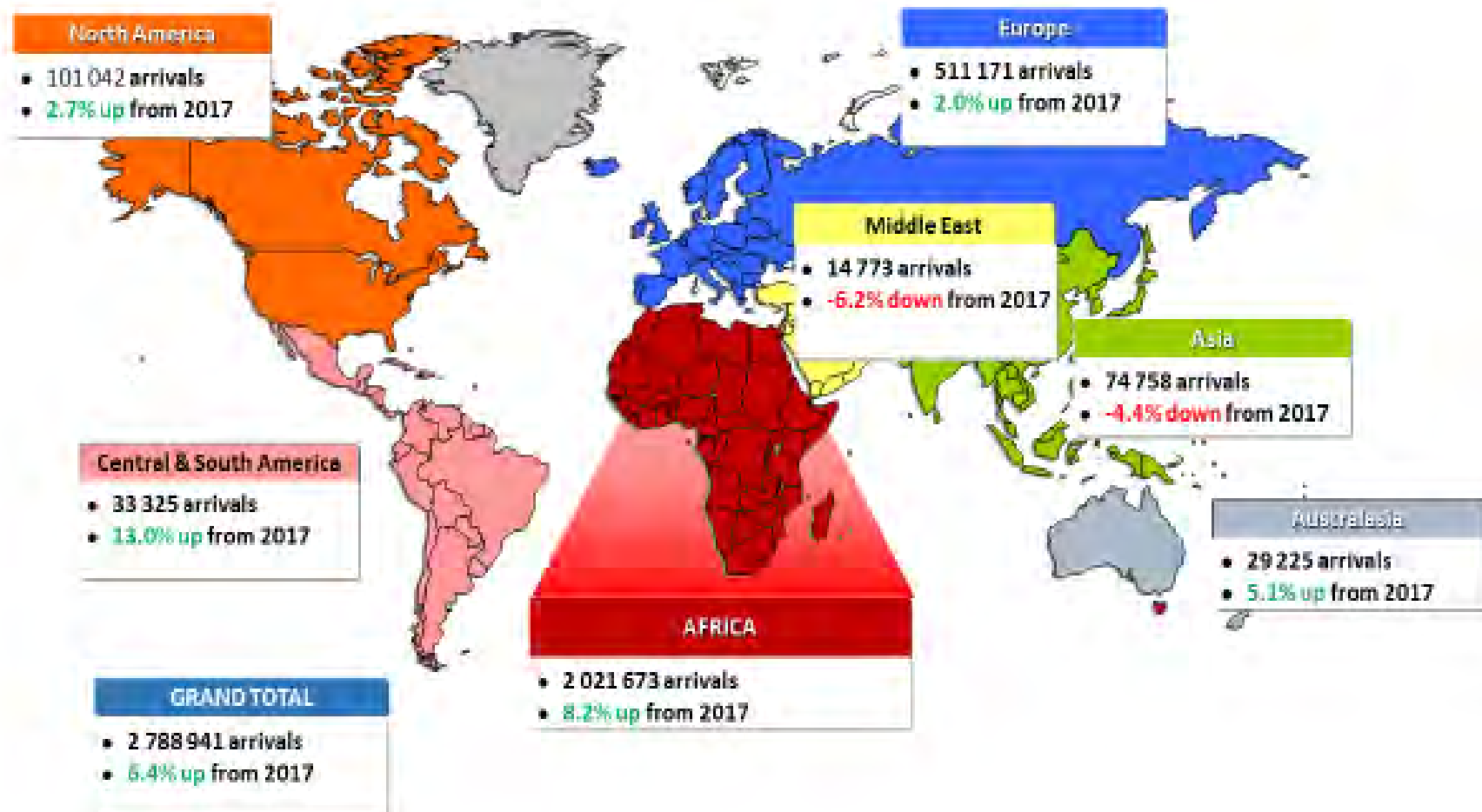
Table 4 below indicates rankings of top ten overseas source markets for the same period under review. Comparing Jan-Mar 2018 with Jan-Mar 2017, India recorded the highest growth of 9.0% however remained in the same 8th position. China moved down from 6th position in 2017 to the 7th position in 2018 with a decline of -16.3% (29 479) during this period. UK remains the main source market from overseas despite this country recording a slight declining growth of -0,5%.

Table 4: South Africa's Top 10 Overseas Source Markets: Jan- Mar 2018 compared to Jan- Mar 2017

| Country 2018 | RANK-2018 | Tourist Arrivals 2018 | RANK-2017 | TOURIST ARRIVALS 2017 | % Change from 2017 to 2018 |
|--------------|-----------|-----------------------|-----------|-----------------------|----------------------------|
| UK | 1 | 146 673 | 1 | 147 358 | -0.5% |
| Germany | 2 | 118 920 | 2 | 111 256 | 6.9% |
| USA | 3 | 82 418 | 3 | 79 764 | 3.3% |
| France | 4 | 53 439 | 4 | 55 437 | -3.6% |
| Netherlands | 5 | 37 228 | 5 | 39 183 | -5.0% |
| Australia | 6 | 25 974 | 7 | 24 663 | 5.3% |
| China | 7 | 24 680 | 6 | 29 479 | -16.3% |
| India | 8 | 21 428 | 8 | 19 651 | 9.0% |
| Sweden | 9 | 20 056 | 9 | 18 879 | 6.2% |
| Canada | 10 | 18 624 | 10 | 18 623 | 0.0% |











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

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



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

**TOP FIVE OVERSEAS
SOURCE MARKETS**

| Country | Arrivals |
|---|--|
| UK  | 146 673 -0.5% down from 2017  |
| Germany  | 118 920 6.9% up from 2017  |
| USA  | 82 418 3.3% up from 2017  |
| France  | 53 439 -3.6% down from 2017  |
| Netherlands  | 37 228 -5.0% down from 2017  |

**TOP FIVE AFRICA
SOURCE MARKETS**

| Country | Arrivals |
|--|--|
| Zimbabwe  | 579 353 10.8% up from 2017  |
| Lesotho  | 488 375 2.4% up from 2017  |
| Mozambique  | 356 725 6.0% up from 2017  |
| Swaziland  | 210 522 6.8% up from 2017  |
| Botswana  | 166 388 30.4% up from 2017  |