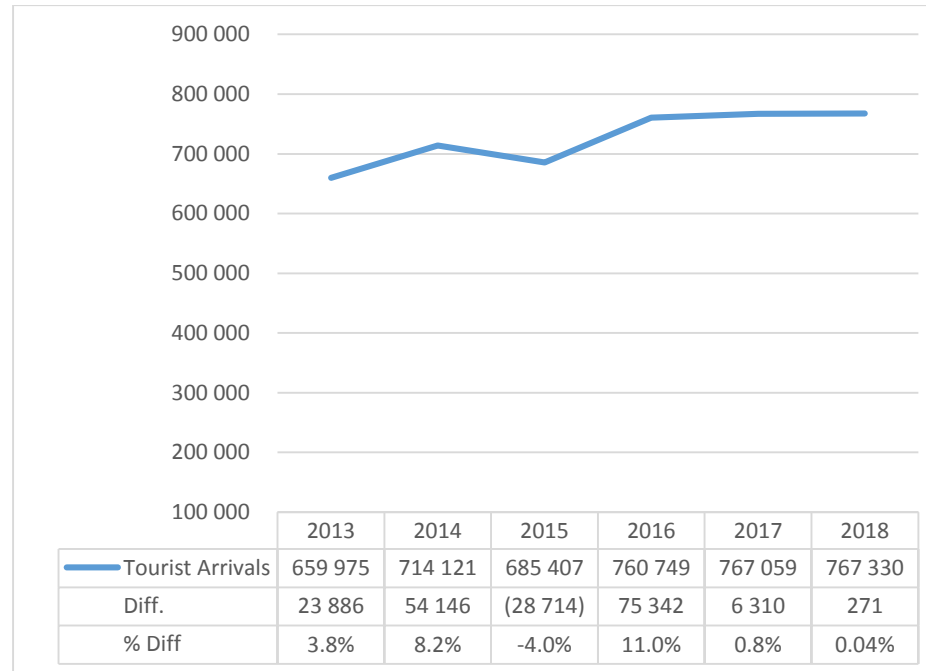


SUMMARY ANALYSIS OF TOURIST ARRIVALS: MAY 2018

TREND ANALYSIS: MAY 2013-MAY 2018

A total of 767 330 tourist arrivals was recorded in May 2018, with a slight increase of 0.04% (271) compared to the same month in 2017. Figure 1 indicates tourist arrivals for the period May 2013 to May 2018. Tourist arrivals increased from 659 975 in 2013 to 714 121 in 2014, which was an increase of 8.2%. Tourist arrivals declined in May 2015 by -4.0% (-28 714) compared to May 2014. Comparing May 2016 with May 2015, there was a double digit growth of 11.0% (75 342) in tourist arrivals. In 2017, tourist arrivals increased by 0.8% (6 310), from 760 749 in 2016 to 767 059 in 2017.

Figure 1: Total Tourist Arrivals May 2013 to May 2018



MAY 2018 COMPARED TO MAY 2017 BY REGION

Table 1 indicates tourist arrivals by region for May 2018 compared to the same month in 2017. Arrivals from the overseas markets decreased by -3.7% (6 280) during this period. The decline was driven by a decrease recorded in most of the overseas regions. The Middle East recorded the highest decline (-12.1%), followed by Asia (-6.3%), Europe (-3.4%), North America (-3.1%) and Australasia (-2.5%). The Central and South America was the only overseas region that recorded a growth of 2.6% in May 2018 when compared to May 2017. Africa recorded a growth of 1.1% and the continent remains the main source of tourist arrivals to the country, accounting for about 78.3% (600 986) of total arrivals during this month.

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

Region	May 2017	May 2018	Difference	% Difference
EUROPE	80 816	78 065	-2 751	-3.4%
NORTH AMERICA	39 821	38 591	-1 230	-3.1%
CENTRAL & SOUTH AMERICA	7 698	7 897	199	2.6%
AUSTRALASIA	9 814	9 569	-245	-2.5%
MIDDLE EAST	2 919	2 567	-352	-12.1%
ASIA	30 349	28 448	-1 901	-6.3%
TOTAL OVERSEAS	171 417	165 137	-6 280	-3.7%
TOTAL AFRICA	594 597	600 986	6 389	1.1%
Unspecified	1 045	1 207	162	15.5%
GRAND TOTAL	767 059	767 330	271	0.0%

JANUARY-MAY 2018 COMPARED TO JANUARY-MAY 2017

Arrivals for the period January-May 2018 compared to the same period in 2017 are indicated in Table 2. Total tourist arrivals (4 423 165) went up by 2.7% for the period January to May 2018 compared to arrivals recorded during the same period in 2017 (4 308 358). Total tourist arrivals from overseas declined by -1.8% (-20 640), which was influenced by a decline recorded in the Middle East (-11.1%), Asia (-5.1%) and Europe (-2.3%). Tourist arrivals from Africa increased by 4.3 % (135 099) during the same period under review. Compared to other regions, the Central and South America region had the highest growth of 9.3% (4 202) during this period. The growth from this region was driven by an increase of 30.5% of tourist arrivals from Argentina. Most countries within the Europe region experienced a decline in tourist arrivals with Norway experiencing the highest decline of -22.4% for the period under review. The declining growth recorded in the Middle East was driven by Iran and Saudi Arabia with both countries having a decline of -27.9% during the same period under review. Asia's regional decline was driven by a decrease in tourist arrivals from most countries from this region including China with -10,1% decline.

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

Region	Jan-May 2017	Jan-May 2018	Difference	% Difference
EUROPE	719 804	702 970	-16 834	-2.3%
NORTH AMERICA	171 849	172 965	1 116	0.6%
CENTRAL & SOUTH AMERICA	45 382	49 584	4 202	9.3%
AUSTRALASIA	49 680	49 930	250	0.5%
MIDDLE EAST	22 896	20 349	-2 547	-11.1%
ASIA	134 477	127 650	-6 827	-5.1%
TOTAL OVERSEAS	1 144 088	1 123 448	-20 640	-1.8%
TOTAL AFRICA	3 159 394	3 294 493	135 099	4.3%
Unspecified	4 876	5 224	348	7.1%
GRAND TOTAL	4 308 358	4 423 165	114 807	2.7%

Table 3 gives the ranking of the top ten African source markets for both January-May 2018 and January-May 2017 periods. 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 from 7th to 8th position in 2018. Angola and Nigeria swapped

positions, with Angola moving to 9th position and Nigeria to 10th position for the period under review. Most countries from the top ten African source markets recorded an increase in tourist arrivals except for Namibia (-3.9%), Zambia (-3.3%) and Nigeria (-4.2%). Angola had experienced the highest growth of 39.8%, which translates to additional 8 518 tourist arrivals from this country during the period under review.

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

Country	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
Zimbabwe	1	942 895	1	866 399	8.8%
Lesotho	2	790 692	2	777 870	1.6%
Mozambique	3	580 993	3	554 903	4.7%
Swaziland	4	353 058	4	351 535	0.4%
Botswana	5	261 764	5	255 046	2.6%
Namibia	6	82 458	6	85 782	-3.9%
Malawi	7	76 637	8	65 620	16.8%
Zambia	8	66 838	7	69 086	-3.3%
Angola	9	29 918	10	21 400	39.8%
Nigeria	10	21 309	9	22 239	-4.2%

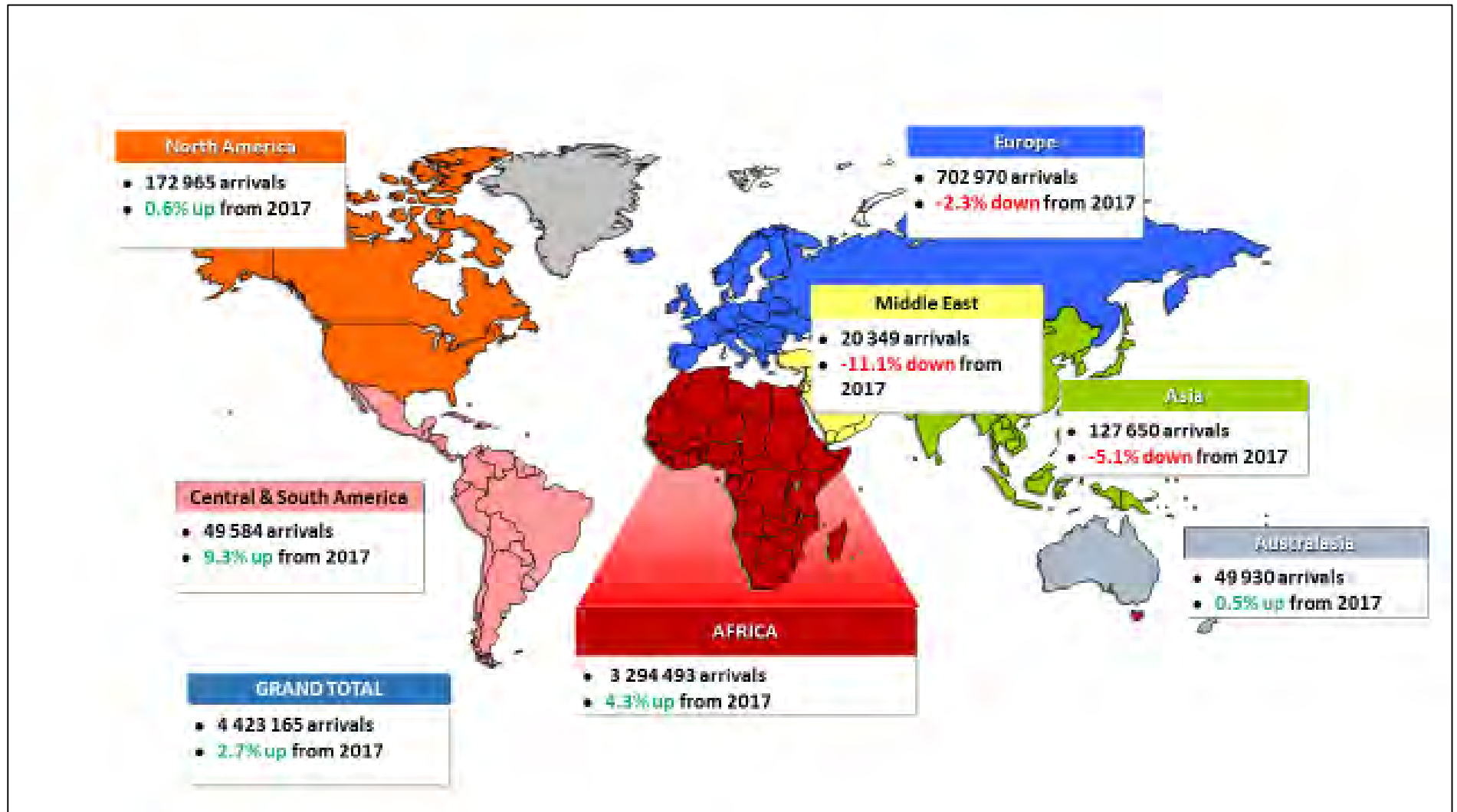
Table 4 shows the rankings of the top ten overseas source markets. Comparing Jan-May 2018 with Jan-May 2017, most top 10 overseas markets recorded a decline except for the USA (0.9%), Australia (1.4%), and Brazil (5.5%). Despite this decline, the top six overseas markets remained the same in Jan-May 2017 and 2018 periods. When comparing the two periods, China dropped from 7th to 8th position whilst India improved its position from 8th to 7th in 2018. UK remained the main source market from overseas even though this country recorded a declining growth of -5.3%.

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

Country 2018	RANK-2018	Tourist Arrivals 2018	RANK-2017	TOURIST ARRIVALS 2017	% Change from 2017 to 2018
UK	1	198 816	1	209 891	-5.3%
Germany	2	152 365	2	153 232	-0.6%
USA	3	144 118	3	142 847	0.9%
France	4	82 133	4	84 316	-2.6%
The Netherlands	5	54 629	5	58 163	-6.1%
Australia	6	44 224	6	43 627	1.4%
India	7	41 896	8	42 968	-2.5%
China	8	38 789	7	43 154	-10.1%
Canada	9	28 847	9	29 002	-0.5%
Brazil	10	28 137	10	26 658	5.5%











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

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



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

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Arrivals
UK 	198 816 -5.3% down from 2017 
Germany 	152 365 -0.6% down from 2017 
USA 	144 118 0.9% up from 2017 
France 	82 133 -2.6% down from 2017 
Netherlands 	54 629 -6.1% down from 2017 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	942 895 8.8% up from 2017 
Lesotho 	790 692 1.6% up from 2017 
Mozambique 	580 998 4.7% up from 2017 
Swaziland 	353 058 0.4% up from 2017 
Botswana 	261 764 2.6% up from 2017 