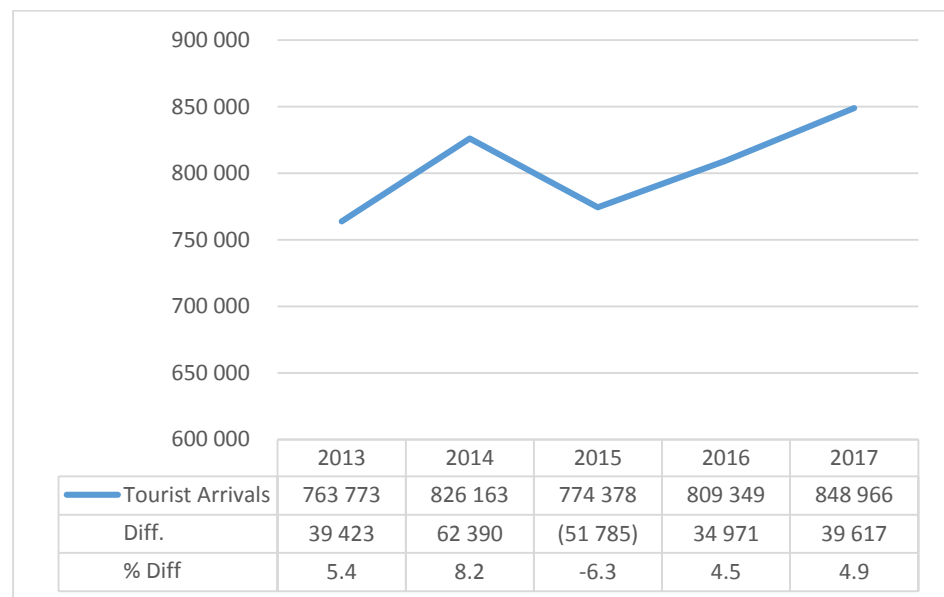


SUMMARY ANALYSIS OF TOURIST ARRIVALS: NOVEMBER 2017

TREND ANALYSIS: NOVEMBER 2013 - NOVEMBER 2017

A total of 848 966 tourist arrivals were recorded in November 2017, which was an increase of 4.9% (39 617) compared to the same month in 2016. Figure 1 below indicates tourist arrivals for the period November 2013 to November 2017. Tourist arrivals increased from 763 773 in 2013 to 826 163 in 2014, which was an increase of about 8.2%. Tourist arrivals however decreased in November 2015 by -6.3% (-51 785) compared to November 2014. Comparing November 2016 with November 2015, there was an increase in tourist arrivals by 4.5% (34 971).

Figure 1: Total Tourist Arrivals November 2013 to November 2017



NOVEMBER 2017 COMPARED TO NOVEMBER 2016 BY REGION

Table 1 below shows tourist arrivals by region for November 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 Australasia and Asia, which recorded declines of 6.1% and 5.1% respectively. Africa had a growth of 5.3% and remains the main source of tourist arrivals to the country, accounting for about 69.3% (587 931) of total arrivals during this month.

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

Region	November 2017	November 2016	Difference	%Difference
EUROPE	180 402	170 081	10 321	6.1
NORTH AMERICA	32 520	32 306	214	0.7
CENTRAL & SOUTH AMERICA	8 281	7 157	1 124	15.7
AUSTRALASIA	8 351	8 893	-542	-6.1
MIDDLE EAST	4 255	4 176	79	1.9
ASIA	25 996	27 404	-1 408	-5.1
TOTAL OVERSEAS	259 805	250 017	9 788	3.9
AFRICA LAND	560 756	529 469	31 287	5.9
AFRICA AIR	27 175	28 724	-1 549	-5.4
TOTAL AFRICA	587 931	558 193	29 738	5.3
Unspecified	1 230	1 139	91	8.0
GRAND TOTAL	848 966	809 349	39 617	4.9

JANUARY - NOVEMBER 2017 COMPARED TO JANUARY - NOVEMBER 2016

Arrivals for the period January-November 2017 compared to the same period in 2016 are indicated in Table 2 below. Total tourist arrivals for the period January to November 2017 (9 293 618) went up by 2.4% compared to arrivals recorded during the same period in 2016 (9 079 056). Total tourist arrivals from overseas grew by 7.9% (180 083) during the same period under review. A slight growth of 0.5% (33 277) in tourist arrivals from Africa was seen in 2017 compared to the same period in 2016; recording a total of 6 830 492. Compared to other sub-regions, the Central and South America region had the highest growth of 65.6% (38 218) for the period under review.

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

Region	Jan-Nov 2017	Jan-Nov 2016	Difference	% Difference
EUROPE	1 493 116	1 375 415	117 701	8.6
NORTH AMERICA	396 787	368 044	28 743	7.8
CENTRAL & SOUTH AMERICA	96 450	58 232	38 218	65.6
AUSTRALASIA	118 708	115 835	2 873	2.5
MIDDLE EAST	52 297	50 014	2 283	4.6
ASIA	294 047	303 782	-9 735	-3.2
TOTAL OVERSEAS	2 451 405	2 271 322	180 083	7.9
AFRICA LAND	6 545 071	6 497 893	47 178	0.7
AFRICA AIR	285 421	299 322	-13 901	-4.6
TOTAL AFRICA	6 830 492	6 797 215	33 277	0.5
Unspecified	11 721	10 519	1 202	11.4
GRAND TOTAL	9 293 618	9 079 056	214 562	2.4

Table 3 gives rankings of top ten African source markets for the period January-November 2016 and January-November 2017. Most of the top ten African markets remained at the same position for the period January-November 2017 except for Malawi and Zambia, which exchanged positions. Most of the top ten countries recorded a declining growth in tourist arrivals except for Zimbabwe, Mozambique, Malawi and Angola for the period under review.

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

Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
Zimbabwe	1	1 830 453	1	1 821 127	0.5
Lesotho	2	1 609 457	2	1 621 137	-0.7
Mozambique	3	1 226 919	3	1 166 838	5.1
Swaziland	4	792 703	4	81 3425	-2.5
Botswana	5	587 185	5	59 0921	-0.6
Namibia	6	182 196	6	187 265	-2.7
Malawi	7	159 982	8	139 837	14.4
Zambia	8	156 176	7	157 343	-0.7
Nigeria	9	46 842	9	60 827	-23.0
Angola	10	42 006	10	38 885	8.0

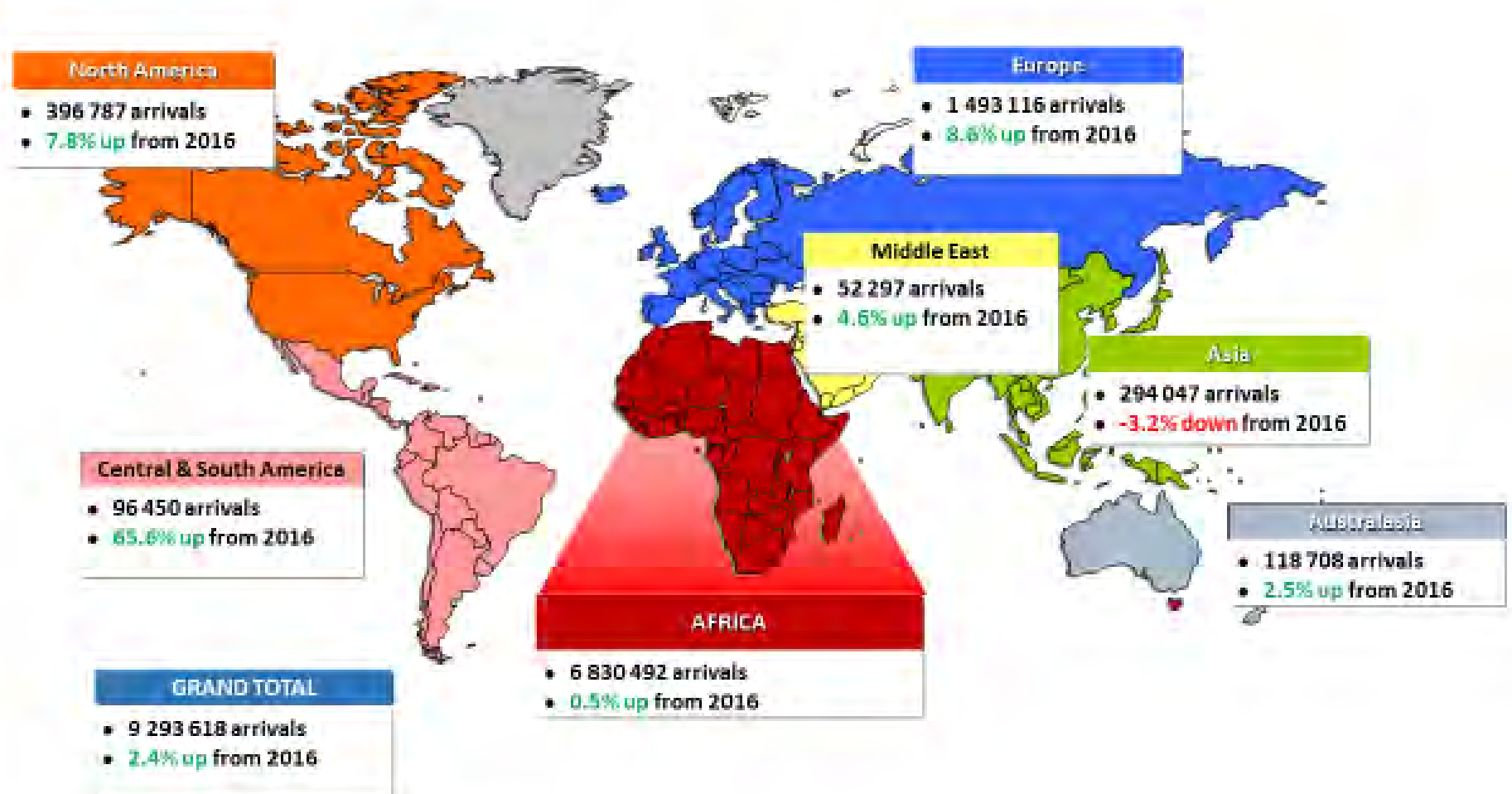
Table 4 below shows rankings of top ten overseas source markets for the January-November 2016 and January-November 2017. Comparing January-November 2017 with January-November 2016, Brazil recorded a significant growth of 84.6% and moved from 16th position in 2016 to the 10th position in 2017. Australia moved from 7th position in 2016 to 6th position in 2017 recording a growth of 7.5%. China, however, dropped from the 6th position in 2016 to 7th position in 2017 with a declining growth of -16.2%.

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

Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
UK	1	397 265	1	394 378	0.7
USA	2	336 763	2	313 704	7.4
Germany	3	316 651	3	280 229	13.0
France	4	181 801	4	140 274	29.6
The Netherlands	5	144 558	5	132 987	8.7
Australia	6	103 499	7	96 317	7.5
China	7	91 793	6	109 521	-16.2
India	8	89 882	8	88 796	1.2
Canada	9	60 024	10	54 340	10.5
Brazil	10	59 701	16	32 341	84.6







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

Figure below indicates a snap view of tourist arrivals to South Africa by regions for the period January to November 2017.



TOTAL TOURIST ARRIVALS BY REGION JANUARY-NOVEMBER 17 COMPARED TO JANUARY-NOVEMBER 2016

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Arrivals
UK 	397 265 0.7% up from 2016 
USA 	336 763 7.4% up from 2016 
Germany 	316 651 13.0% up from 2016 
France 	181 801 29.6% up from 2016 
Netherlands 	144 558 8.7% up from 2016 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	1 830 453 0.5% down from 2016 
Lesotho 	1 609 457 0.7% down from 2016 
Mozambique 	1 226 919 5.1% up from 2016 
Swaziland 	792 703 2.5% down from 2016 
Botswana 	587 185 0.6% down from 2016 