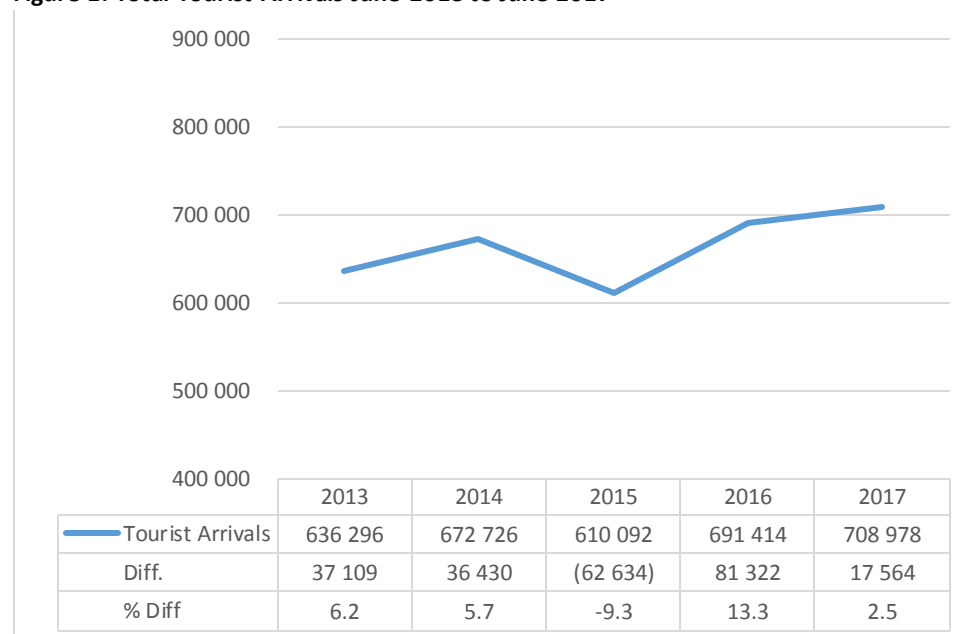


SUMMARY ANALYSIS OF TOURIST ARRIVALS: JUNE 2017

TREND ANALYSIS: JUNE 2013 - JUNE 2017

A total of 708 978 tourist arrivals were recorded in June 2017, which was an increase of 2.5% (17 564) compared to the same month in 2016. Figure 1 below indicates tourist arrivals for the period June 2013 to June 2017. Tourist arrivals increased from 636 296 in 2013 to 672 726 in 2014, which was an increase of about 5.7%. Tourist arrivals however declined in June 2015 by 9.3% (62 634) compared to June 2014. Comparing June 2015 with June 2016, there was an increase in arrivals by 13.3% (81 322). June 2017 recorded the highest number of tourist arrivals (708 978) when compared the same month of previous years under review.

Figure 1: Total Tourist Arrivals June 2013 to June 2017



JUNE 2017 COMPARED TO JUNE 2016 BY REGION

Table 1 below indicates tourist arrivals by region for June 2017 compared to the same month in 2016. Most overseas regions recorded positive growths in tourist arrivals during the period under review except for Asia which recorded a declining growth of 2.2%. The declining growth recorded in Asia was driven by China (including Hong Kong) which recorded a declining growth of 37% during the period under review. Brazil continues to drive the growth in Central and South America, with a growth of 176% recorded during June 2017 compared to the same month in 2016. The decline recorded in China as well as the growth recorded in Brazil will be further investigated. Africa continues to be the main source of tourist arrivals to the country accounting for about 78.5% of total arrivals during this month.

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

Region	June 2017	June 2016	Difference	%Difference
EUROPE	64 316	59 118	5 198	8.8%
NORTH AMERICA	39 648	34 631	5 017	14.5%
CENTRAL & SOUTH AMERICA	8 081	3 661	4 420	120.7%
AUSTRALASIA	11 185	10 314	871	8.4%
ASIA	25 286	25 856	-570	-2.2%
MIDDLE EAST	3 220	2 200	1 020	46.4%
TOTAL OVERSEAS	151 736	135 780	15 956	11.8%
AFRICA AIR	20 613	22 162	-1 549	-7.0%
AFRICA LAND	535 674	532 649	3 025	0.6%
TOTAL AFRICA	556 287	554 811	1 476	0.3%
Unspecified	955	823	132	16.0%
GRAND TOTAL	708 978	691 414	17 564	2.5%

JANUARY - JUNE 2017 COMPARED TO JANUARY - JUNE 2016

Arrivals for the period January-June 2017 compared to the same period in 2016 are indicated in Table 2 below. Tourist arrivals for the first six months of 2017 (5 017 336) recorded an increase of 1.0% compared to arrivals recorded during the same period in 2016 (4 969 087). Tourist arrivals from Africa decreased from 3 793 492 in 2016 to 3 715 681 in 2017, which was a decline of about 2.1% (-77 811). Total tourist arrivals from overseas markets recorded a double digit growth of about 10.7% (125 676) during the same period under review. Compared to other sub-regions, the Central and South America region had the highest growth of 95.3% (26 092) for the period under review. As already indicated, this growth was driven by Brazil.

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

Region	Jan-June 2017	Jan-June 2016	Difference	% Difference
EUROPE	784 120	706 492	77 628	11.0%
NORTH AMERICA	211 497	192 999	18 498	9.6%
CENTRAL & SOUTH AMERICA	53 463	27 371	26 092	95.3%
AUSTRALASIA	60 865	58 651	2 214	3.8%
ASIA	159 763	161 615	-1 852	-1.1%
MIDDLE EAST	26 116	23 020	3 096	13.4%
TOTAL OVERSEAS	1 295 824	1 170 148	125 676	10.7%
AFRICA AIR	20 613	22 162	-1 549	-7.0%
AFRICA LAND	535 674	532 649	3 025	0.6%
TOTAL AFRICA	3 715 681	3 793 492	-77 811	-2.1%
Unspecified	5 831	5 447	384	7.0%
GRAND TOTAL	5 017 336	4 969 087	48 249	1.0%

Table 3 gives rankings of top ten African source markets for the period January –June 2016 and January-June 2017. All top ten African markets remained at the same position for the period under review. Most of the top ten countries recorded a declining growth in tourist arrivals except for Malawi and Angola for the period under review.

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

Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
Zimbabwe	1	1 011 355	1	1 036 443	-2.4%
Lesotho	2	913 047	2	914 572	-0.2%
Mozambique	3	658 186	3	681 098	-3.4%
Swaziland	4	417 946	4	433 210	-3.5%
Botswana	5	300 700	5	313 564	-4.1%
Namibia	6	99 479	6	103 681	-4.1%
Zambia	7	82 707	7	84 228	-1.8%
Malawi	8	78 495	8	68 790	14.1%
Nigeria	9	25 606	9	33 073	-22.6%
Angola	10	24 213	10	21 659	11.8%











Table 4 below shows rankings of top ten overseas source markets for the same period under review. Comparing Jan-June 2017 with Jan-June 2016, Brazil recorded the highest growth and this country moved from 17th position in 2016 to the 10th position in 2017 with a growth of about 128.5% (18 202). Australia moved higher from 8th position in 2016 to 6th position in 2017 recording a 9.5% increase (4 651) while the Netherlands also moved one position up from 6th place in 2016 to 5th position in 2017. China however dropped from 5th position in 2016 to 8th position in 2017 with a declining growth of 15.4% (-8 923). Switzerland fell out of the top ten countries during this period.

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











Country 2017	RANK-2017	Tourist Arrivals 2017	RANK-2016	TOURIST ARRIVALS 2016	% Change from 2016 to 2017
UK	1	228 963	1	222 942	2.7%
USA	2	179 002	2	163 257	9.6%
Germany	3	163 909	3	142 092	15.4%
France	4	91 807	4	68 053	34.9%
The Netherlands	5	63 157	6	56 293	12.2%
Australia	6	53 514	8	48 863	9.5%
India	7	51 842	7	51 020	1.6%
China	8	49 173	5	58 096	-15.4%
Canada	9	32 495	9	29 742	9.3%
Brazil	10	32 368	17	14 166	128.5%

TOTAL TOURIST ARRIVALS TOP TEN OVERSEAS AND AFRICA MARKETS: JAN-JUNE 17 COMPARED TO JAN-JUNE 2016.

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Jan –June 2017 Arrivals
UK 	228 963 2,7% up from 2016 
USA 	179 002 9,6% up from 2016 
Germany 	163 909 15,4% up from 2016 
France 	91 807 34,9% up from 2016 
Netherlands 	63 157 12,2% up from 2016 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Jan –June 2017 Arrivals
Zimbabwe 	1 011 355 2,4% down from 2016 
Lesotho 	913 047 0,2% down from 2016 
Mozambique 	658 186 3,4% down from 2016 
Swaziland 	417 946 3,5% down from 2016 
Botswana 	300 700 4,1% down from 2016 

TOTAL TOURIST ARRIVALS BY REGION JAN-JUNE 17 COMPARED TO JAN-JUNE 2016.

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

