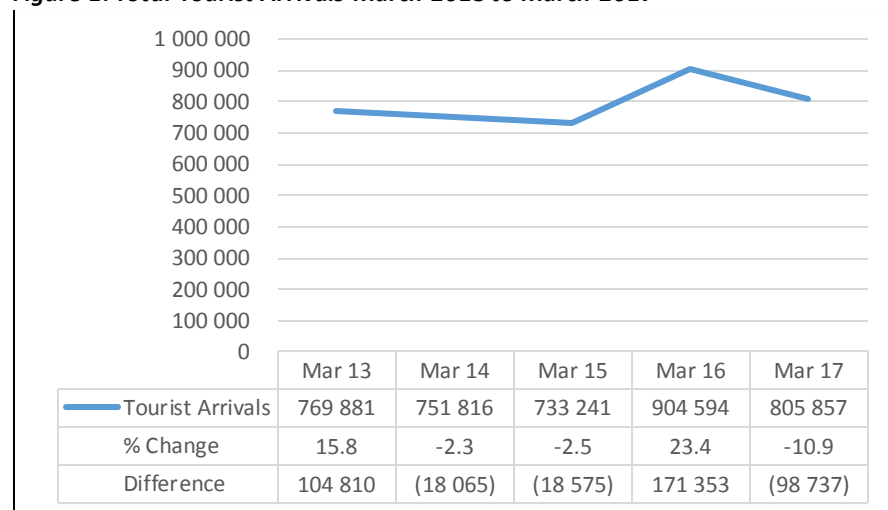


SUMMARY ANALYSIS OF TOURIST ARRIVALS: MARCH 2017

TREND ANALYSIS: MARCH 2013-2017

A total of 805 857 tourist arrivals were recorded in March 2017, which was a decline of 10.9% (98 737) compared to the same month in 2016. The decline could be related to Easter falling in April this year unlike in March last year, and the impact was more on arrivals from the continent. Figure 1 below indicates tourist arrivals for the period March 2013-2017. Tourist arrivals decreased from 769 881 in 2013 to 751 816 in 2014, which was a decline of about 2.3%. Tourist arrivals continued to decline in March 2015 by 2.5% (18 575) when compared to March 2014. March 2016 received the highest number of tourist arrivals (904 595) when compared to all other years under review.

Figure 1: Total Tourist Arrivals March 2013 to March 2017



MARCH 2017 COMPARED TO MARCH 2016 BY REGION

Table 1 below indicates tourist arrivals by region for March 2017 compared to the same month in 2016. All overseas regions recorded positive growths in tourist arrivals during the period under review except for Australasia which recorded a declining growth of 0,9%. The overall growth recorded from overseas markets was 5,9% (14 001) during this period. The total declining growth of tourist arrivals recorded in March 2017 was mainly driven by the declining growth of tourist arrivals from Africa in total, which was about 16,9% (112 807).

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

Region	March 2017	March 2016	% Difference	Diff.
OVERSEAS				
EUROPE	155780	151938	2.5%	3842
NORTH AMERICA	39985	36622	9.2%	3363
CENTRAL & SOUTH AME	9352	4736	97.5%	4616
AUSTRALASIA	10063	10150	-0.9%	-87
ASIA	25906	25484	1.7%	422
MIDDLE EAST	8555	6 710	27.5%	1845
TOTAL OVERSEAS	249641	235 640	5.9%	14001
AFRICA				
AFRICA AIR	23990	23363	2.7%	627
INDIAN OCEANS ISLAND	2612	2352	11.1%	260
AFRICA LAND	528611	642305	-17.7%	-113694
TOTAL AFRICA	555213	668 020	-16.9%	-112807
Unspecified	1003	934	7.4%	69
GRAND TOTAL	805857	904 594	-10.9%	-98737

JANUARY - MARCH 2017 COMPARED TO JANUARY - MARCH 2016

Arrivals for the period January-March 2017 compared to the same period in 2016 are indicated in Table 2 below. Tourist arrivals for the first three months of 2017 (2 622 215) recorded a decline of 3,6% compared to arrivals recorded during the same period in 2016 (2 721 005). All regions recorded positive growths except for Australasia and Africa, which showed declining growths of 0,9% and 8,1% respectively.

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

	<i>Jan-Mar 2017 compared to Jan-Mar 2016</i>			Diff.
Region	Jan-Mar 2017	Jan-Mar 2016	Jan-Mar 2016/17 % Diff	
OVERSEAS				
EUROPE	496114	455703	8.9%	40411
NORTH AMERICA	98387	91831	7.1%	6556
CENTRAL & SOUTH AMERICA	29498	14659	101.2%	14839
AUSTRALASIA	27815	28055	-0.9%	-240
ASIA	78225	77364	1.1%	861
MIDDLE EAST	20577	17638	16.7%	2939
TOTAL OVERSEAS	750616	685250	9.5%	65366
AFRICA				
AFRICA AIR	74985	74400	0.8%	585
INDIAN OCEANS ISLANDS	7469	7656	-2.4%	-187
AFRICA LAND	1786373	1951176	-8.4%	-164803
TOTAL AFRICA	1868827	2033232	-8.1%	-164405
Unspecified	2772	2523	9.9%	249
GRAND TOTAL	2622215	2721005	-3.6%	-98790

Table 3 gives rankings of top ten African source markets for the period January – March 2016 and January – March 2017. Most of the top ten African markets remained at the same position for the period under review except for the last two markets as indicated in the table below. During this period, Zambia and Angola

improved their positions from 8th to 7th and 10th to 9th respectively, whilst Malawi and Nigeria dropped one position in the top ten list. This might change during the year as the difference is not significant.

Table 3: South Africa's Top 10 African Source Markets: Jan-Mar 2017 compared to Jan-Mar 2016






COUNTRY	RANK-2017	TOURIST ARRIVALS 2017	RANK-2016	TOURIST ARRIVALS 2016
Zimbabwe	1	522 647	1	567 318
Lesotho	2	476 879	2	492 832
Mozambique	3	336 474	3	379 134
Swaziland	4	197 032	4	220 578
Botswana	5	127 553	5	164 388
Namibia	6	45 965	6	51 638
Zambia	 7	39 964	8	40 851
Malawi	 8	39 859	7	34 437
Angola	 9	14 186	10	16 247
Nigeria	 10	13 235	9	12 951

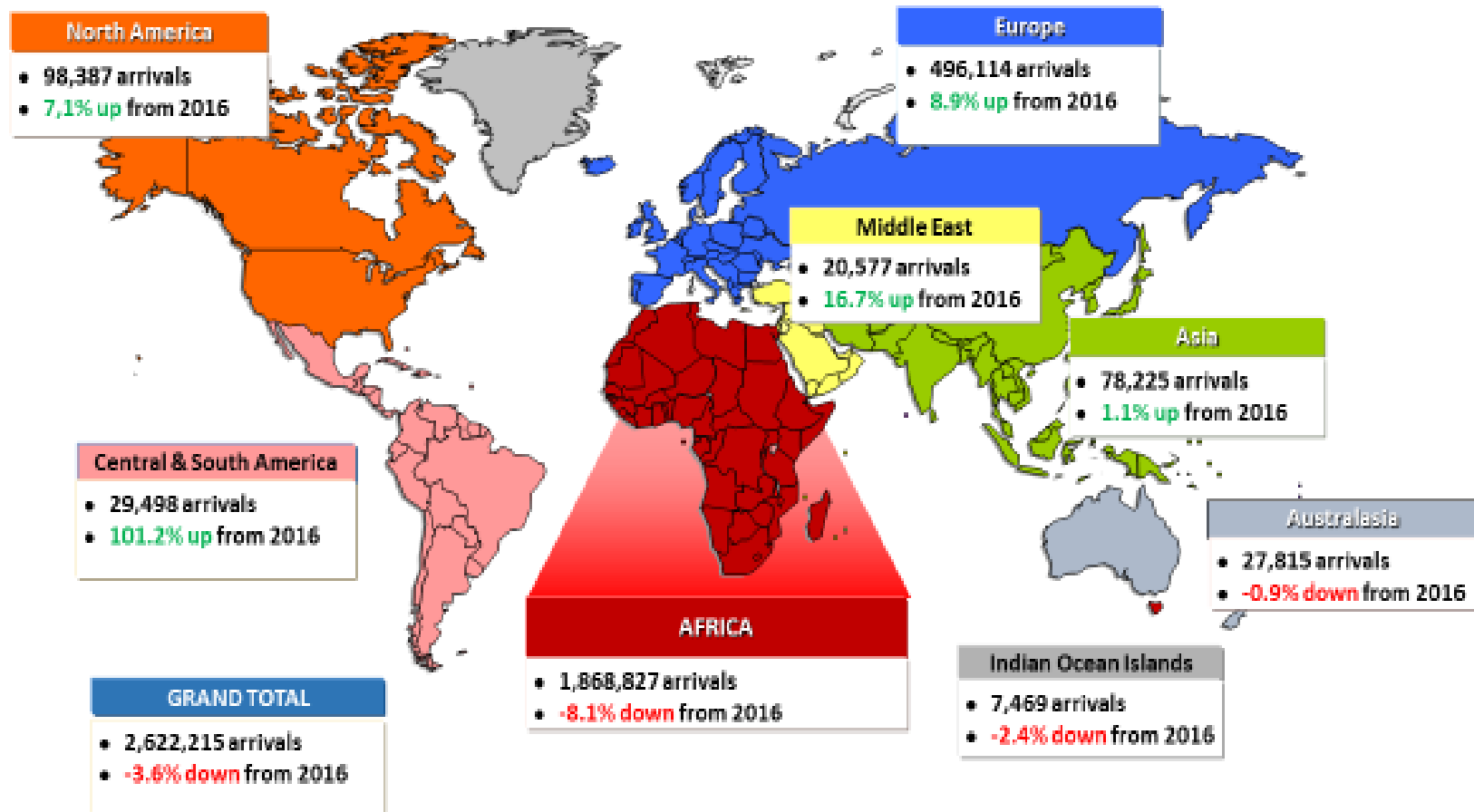
Table 4 below shows rankings of top ten overseas source markets for the same period under review. Canada went down from a ranking of 9th position to the 10th position. Switzerland which was in the top 10 in Jan-March 2016 moved out of the top ten and Sweden moved from 11th position to 9th position.

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

COUNTRY	RANK-2017	TOURIST ARRIVALS 2017	RANK-2016	TOURIST ARRIVALS 2016
UK	1	147 358	1	147 639
Germany	2	111 256	2	101 482
USA	3	79 764	3	75 067
France	4	55 437	4	40 121
Netherlands	5	39 183	5	33 674
China (HK)	6	29 549	6	31 610
Australia	7	24 663	7	23 449
India	8	19 651	8	19 960
Sweden	 9	18 879	11	15715
Canada	 10	18 623	9	16 764

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











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












Top Five Source Markets for South Africa Jan-March 2017

Figure below indicates a snap view of the top five source Overseas and African markets to South Africa for the period January to March 2017.

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country	Jan –March 2017 Arrivals
UK 	147 358 0,2% down from 2016 
Germany 	111 256 9,6% up from 2016 
USA 	76 764 6,3% up from 2016 
France 	55 437 38,2% up from 2016 
Netherlands 	39 183 16,4% up from 2016 

**TOP FIVE AFRICA
SOURCE MARKETS**

Country	Jan –March 2017 Arrivals
Zimbabwe 	522 647 7,9% down from 2016 
Lesotho 	476 879 3,2% down from 2016 
Mozambique 	336 474 11,3% down from 2016 
Swaziland 	197 032 10,7% down from 2016 
Botswana 	127 553 22,4% down from 2016 