

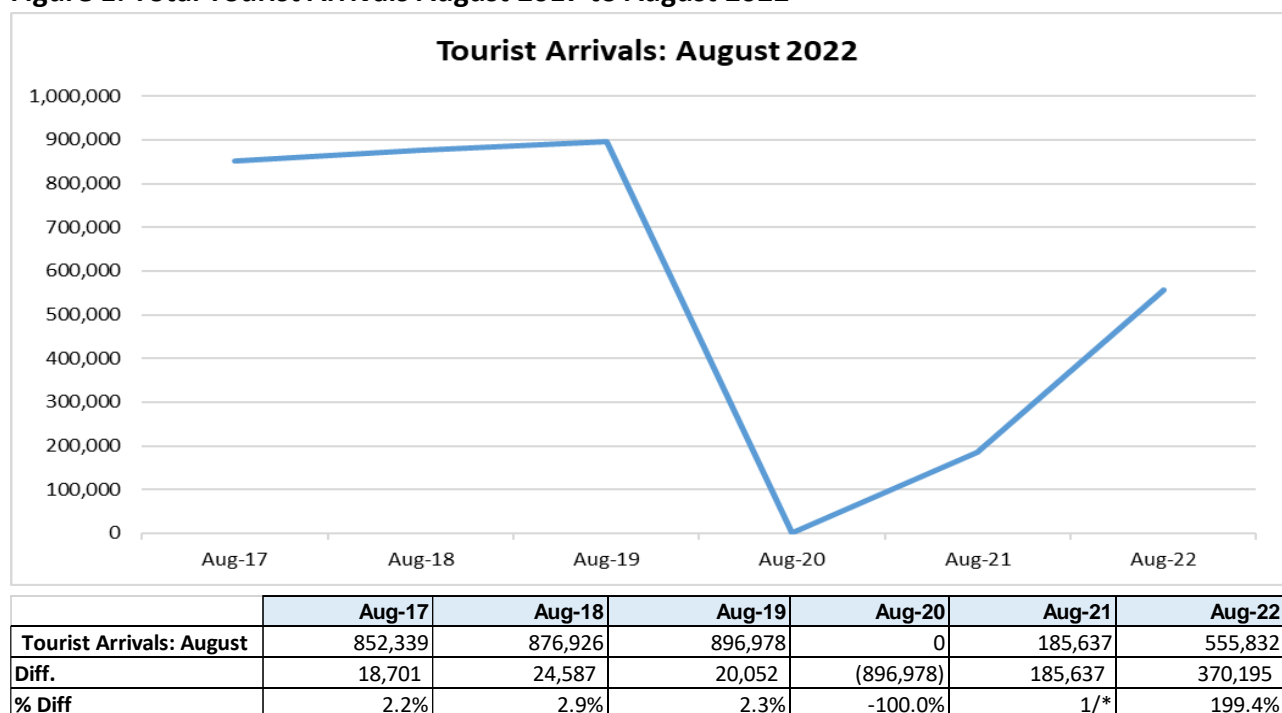
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR AUGUST 2022

To limit the spread of COVID-19 and prepare the health care sector, the South African government announced a national lockdown for the country starting on 27 April 2020, which prevented the movement of people entering and leaving South Africa. International tourists were not allowed to enter South Africa during the months of April-September 2020. On the 05th of April 2022, the National State of Disaster was lifted and most of the government COVID-19 regulations were removed including travel regulations to South Africa. Statistics South Africa (Stats SA) has published data on the number of tourists for August 2022 and this report provides further analysis of the tourists that travelled to South Africa during this period. The performance of tourism-related industries namely; accommodation, food and beverages, and aviation for August 2022 compared to August 2021 is also provided in this report.

TREND ANALYSIS: AUGUST 2017 – AUGUST 2022

A total of 555 832 tourist arrivals was recorded in August 2022, which was an increase of 199,4% (370 195) compared to the same month in 2021. Figure 1 below indicates tourist arrivals for the period August 2017 to August 2022. Tourist arrivals increased from 852 339 in 2017 to 876 926 in 2018, which was a growth of 2,9% (24 587). Tourist arrivals further increased from 876 926 in 2018 to 896 978 in 2019, which was an increase of 2,3% (20 052). There were zero tourists recorded during August 2020 since the country was under lockdown level 4 which prevented tourists from entering the country.

Figure 1: Total Tourist Arrivals August 2017 to August 2022



**Changes from zero in the preceding period cannot be calculated as a percentage*

Source: Stats SA Tourism and Migration report, August 2022 and tourist arrivals data cuts

AUGUST 2022 COMPARED TO AUGUST 2021 BY REGION

Table 1 below indicates tourist arrivals by region for August 2022 compared to the same month in 2021. All regions experienced a growth in tourist arrivals during this month compared to the same month of the previous year. Australasia recorded the highest increase of 2 154,0% (+5 622) followed by Europe (519,6%; +65 402) and Middle East (407,5%; +5 587). Africa also recorded an increase of 168,7% (+265 110) and this region remains the main source of tourist arrivals to the country, accounting for 76,0% (422 247) of total tourist arrivals during August 2022.

Table 1: Total Tourist Arrivals by Region: August 2022 vs. August 2021

Region	August 2022	August 2021	Diff	% Diff.
EUROPE	77 988	12 586	65 402	519.6%
NORTH AMERICA	28 336	9 387	18 949	201.9%
CENTRAL & SOUTH AMERICA	2 475	851	1 624	190.8%
AUSTRALASIA	5 883	261	5 622	2 154.0%
MIDDLE EAST	6 958	1 371	5 587	407.5%
ASIA	11 117	3 701	7 416	200.4%
TOTAL OVERSEAS	132 757	28 157	104 600	371.5%
AFRICA	422 247	157 137	265 110	168.7%
UNSPECIFIED	828	343	485	141.4%
GRAND TOTAL	555 832	185 637	370 195	199.4%

Source: Stats SA Tourism and Migration Report, August 2022 and tourist arrivals data cuts

JANUARY-AUGUST 2022 COMPARED TO JANUARY-AUGUST 2021

Tourist arrivals figures by region for the period January-August 2022 compared to the period January-August 2021 are indicated in table 2 below. Total tourist arrivals went up by 165,2% for the period January-August 2022 compared to the period January-August 2021. This was a growth from a total of 1 263 163 tourist arrivals recorded during January-August 2021 to 3 349 402 during the period January-August 2022. Total tourist arrivals from the overseas market increased by 419,9% (+664 396). Australasia (1 439,1%) recorded the highest positive growth followed by Europe (564,6%), Middle East (314,3%), North America (293,1%), Central and South America (257,1%) and Asia (182,3%).

In Australasia, Australia recorded the highest increase in volume having an increase of 25 184 (1 489,3%) followed by New Zealand (+4 614; 1 240,3%). The United Kingdom had recorded the highest increase in volume (+150 503; 1 115,0%) in the Europe region. In North America, the USA has recorded the highest increase in volume (+116 260; 275,2%). Israel had recorded the highest increase in volume for the Middle East region with an additional 8 488 tourists compared to January-August 2021. In Central and South America, Brazil recorded the highest increase in volume (+6 327, 265,1%) for the period under review.

Tourist arrivals from Africa increased by 128,6% (+1 418 428) during the same period under review. In terms of volume, the increase recorded from the continent was driven by Zimbabwe (+442 947; 179,4%) followed by Lesotho (+309 145; 145,0%) and Mozambique (+266 375; 84,6%), refer to table 2.1 below.

Table 2. Total Tourist Arrivals by Region January-August 2022 vs. January-August 2021

Region	Jan-August 2022	Jan-August 2021	Diff	% Diff
EUROPE	500 662	75 329	425 333	564.6%
NORTH AMERICA	177 202	45 077	132 125	293.1%
CENTRAL & SOUTH AMERICA	16 502	4 621	11 881	257.1%
AUSTRALASIA	31 905	2 073	29 832	1 439.1%
MIDDLE EAST	26 532	6 404	20 128	314.3%
ASIA	69 832	24 735	45 097	182.3%
TOTAL OVERSEAS	822 635	158 239	664 396	419.9%
AFRICA	2 521 054	1 102 626	1 418 428	128.6%
UNSPECIFIED	5 713	2 298	3 415	148.6%
GRAND TOTAL	3 349 402	1 263 163	2 086 239	165.2%

Source: Stats SA Tourism and Migration Report, August 2022 and tourist arrivals data cuts

Table 2.1 below gives the rankings of the top ten African source markets for the period January-August 2022 compared to January-August 2021. Most of the top ten African source markets moved their positions except for Lesotho, Eswatini, Zambia and Malawi which ranked 3rd, 4th, 7th and 8th position during both periods. Zimbabwe, Botswana and Angola moved up their positions from 2nd to 1st, 6th to 5th and from 12th to 9th respectively in 2022 when compared to 2021. Angola replaced Nigeria in the top 10 during this period. All top ten countries recorded a positive growth with Angola recording the highest increase of 345,4% followed by Zimbabwe (179,4%) and Botswana (172,0%).

Table 2.1: South Africa's Top 10 African Source Markets: January-August 2022 vs. January-August 2021

Country	Rank: August 2022	Tourist Arrivals Jan-Aug 2022	Rank: August 2021	Tourist Arrivals Jan-Aug 2021	% Change from August 2021 to August 2022
Zimbabwe	1	689 859	2	246 912	179.4%
Mozambique	2	581 163	1	314 788	84.6%
Lesotho	3	522 359	3	213 214	145.0%
Eswatini	4	247 145	4	101 587	143.3%
Botswana	5	144 901	6	53 281	172.0%
Namibia	6	83 906	5	54 289	54.6%
Zambia	7	72 227	7	40 363	78.9%
Malawi	8	65 710	8	31 109	111.2%
Angola	9	19 653	12	4 412	345.4%
Tanzania	10	15 867	9	7 509	111.3%

Source: Stats SA Tourism and Migration Report, August 2022

Table 2.2 shows the rankings of the top ten Overseas source markets. Comparing January-August 2022 with January-August 2021, all top 10 overseas markets recorded an increase in tourist arrivals. Most of the top ten overseas markets moved positions for the period under review except for Germany and France which ranked 3rd and 5th position during both periods. UK replaced the USA as the main source market from overseas, recording a growth of 1 115,0%. China, Pakistan

and Russian Federation were replaced by Australia, Belgium and Canada in the top 10 list during January-August 2022 compared to January-August 2021.

Table 2.2: South Africa's Top 10 Overseas Source Markets: January-August 2022 vs. January-August 2021

Country	Rank: August 2022	Tourist Arrivals Jan-Aug 2022	Rank: August 2021	Tourist Arrivals Jan-Aug 2021	% Change from August 2021 to August 2022
UK	1	164 001	2	13 498	1 115.0%
USA	2	158 499	1	42 239	275.2%
Germany	3	86 868	3	12 286	607.0%
The Netherlands	4	51 532	6	6 597	681.1%
France	5	44 588	5	8 143	447.6%
India	6	33 198	4	9 141	263.2%
Australia	7	26 875	19	1 691	1 489.3%
Belgium	8	19 511	13	3 024	545.2%
Italy	9	19 431	11	3 161	514.7%
Canada	10	18 703	15	2 838	559.0%

Source: Stats SA Tourism and Migration Report, August 2022

PERFORMANCE OF SOUTH AFRICA'S TOURISM-RELATED INDUSTRIES: AUGUST 2022 COMPARED TO AUGUST 2021

The next section of the report is about the performance of tourism-related industries during August 2022 compared to August 2021.

Impact of Coronavirus (COVID-19) on tourism-related industries' performance

On 11 March 2020, the World Health Organisation (WHO) declared the Coronavirus (COVID-19) outbreak a pandemic (WHO, 2020). To limit the spread of COVID-19, many countries had started to introduce lockdown measures, which prevented people from leaving their countries. On 1 May 2020, the South African government adopted the risk-adjusted strategy, which aimed to increase economic activity while putting measures in place to reduce the transmission of the virus. As part of this approach, five (5) Coronavirus alert levels were introduced, mainly indicating the different sectors that can operate under these levels. The national state of disaster was lifted as of 5 April 2022 which resulted in most of the COVID-19 regulations being removed. The table below provides a summary of the lockdown regulations of the different levels for the accommodation, food and beverage and aviation industries for August 2022 and August 2021. The performance of the tourism-related industries therefore should be viewed within the context of South Africa's COVID-19 lockdown regulations for the different lockdown restriction levels. More information on the regulations can be sourced from the website: www.gov.za/coronavirus.

Table 3: South Africa COVID-19 regulations for accommodation, food and beverages and aviation industries for the period August 2022 and August 2021

AUGUST 2022 The National State of Disaster has been lifted	AUGUST 2021 Adjusted level 3
ACCOMMODATION No restrictions.	ACCOMMODATION All accommodation establishments allowed full capacity of the available rooms for accommodation.
FOOD AND BEVERAGES No restrictions.	FOOD AND BEVERAGES Restaurants all allowed to operate but subject to the strict adherence to all health protocols and must close at 8pm, alcohol prohibited.
AVIATION No restrictions.	AVIATION Domestic and International air travel allowed. International travel allowed.

Source: <https://www.gov.za/coronavirus>

2.1 ACCOMMODATION INDUSTRY: AUGUST 2022

ACCOMMODATION INDUSTRY INCOME: AUGUST 2022 COMPARED TO AUGUST 2021 (CURRENT PRICES)

Table 4 below provides the total income from the accommodation industry which comprises of income from restaurants, bar sales, income from accommodation only and other income for August 2022 compared to August 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. In August 2022, the total income (current prices) from the accommodation industry showed an increase of 55,4% compared to August 2021. Total income from all of the categories recorded an increase except for Caravans and camping sites which decreased by -20,2% when compared to 2021. Total income from Guest houses and guest farms recorded the highest increase of about 77,0% moving from R74,5 million in August 2021 to R131,9 million in August 2022.

Table 4: Income from accommodation (current prices): August 2022 compared to August 2021

Type of Accommodation	AUGUST 2022				AUGUST 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	August 2022 compared to August 2021
Hotels (R million)	R445,5	R913,1	R1 150,0	R2 508,6	R197,7	R418,9	R967,1	R1 583,7	58,4%
Caravan parks and camping sites (R million)	R8,6	R35,1	R5,3	R49,0	R9,2	R46,3	R5,9	R61,4	-20,2%
Guest houses and guest farms (R million)	R14,6	R113,1	R4,2	R131,9	R8,6	R59,9	R6,0	R74,5	77,0%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R98,8	R857,3	R40,5	R996,6	R89,3	R538,9	R24,8	R653,0	52,6%
Total Industry - (R million)	R567,5	R1 918,6	R1 200,0	R3 686,1	R304,8	R1 064,0	R1 003,8	R2 372,6	55,4%

Source: Stats SA: August Accommodation data cuts, 24 October 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 80,3% during August 2022. All categories of accommodation showed an increase in income levels except for Caravan parks and camping sites which decreased by -24,2% when compared to 2021. Total income from Hotels recorded the highest

increase of 118,0%; followed by Guest houses and guest farms (88,8%) and other accommodation (59,1%).

Table 5: Income from Accommodation (Current prices: Excluding restaurants, bar sales and other income): August 2022 compared to August 2021

Type of Accommodation	AUGUST 2022 Accommodation only	AUGUST 2021 Accommodation only	% Change August 2022 compared to August 2021
Hotels (R million)	R913,1	R418,9	118,0%
Caravan parks and camping sites (R million)	R35,1	R46,3	-24,2%
Guest houses and guest farms (R million)	R113,1	R59,9	88,8%
Other accommodation (R million)	R857,3	R538,9	59,1%
Total Industry – (R million)	R1 918,6	R1 064,0	80,3%

Source: Stats SA: August Accommodation data cuts, 24 October 2022

The monthly percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) for January-August for the period 2021-2022 is provided in table 6 below. Income from accommodation showed an increase of 80,3% during August 2022 when compared to the same month in 2021 and this was the second highest increase recorded compared to the previous months of the year as seen in table below.

Table 6: Year on Year Change in Income from Accommodation at current prices

MONTH	2021	2022
January	-69,4%	64,0%
February	-74,1%	92,4%
March	-39,0%	69,7%
April	2 432,8%	31,3%
May	1 735,5%	56,0%
June	671,8%	61,4%
July	274,9%	137,5%
August	126,1%	80,3%

Source: Stats SA: August Accommodation data cuts, 24 October 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: AUGUST 2022 COMPARED TO AUGUST 2021

Table 7 below indicates occupancy rates by accommodation type for August 2022 compared to August 2021. The total accommodation occupancy rate in August 2022 was 35,1%, which was an increase compared to 22,9% recorded in August 2021. The occupancy rate for all of the accommodation establishments increased in August 2022 compared to the same month last year except for Caravan parks and camping sites which decreased from 39,6% in 2021 to 36,3% in 2022.

Table 7: Occupancy Rate: August 2022 compared to August 2021

Category	AUGUST	
	2021	2022
Hotel	20,3%	35,4%
Caravan Parks and Camping Sites	39,6%	36,3%
Guest-Houses and Guest Farms	17,3%	21,5%
Other Accommodation	27,1%	38,9%
Total Accommodation	22,9%	35,1%

Source: Stats SA: August Accommodation data cuts, 24 October 2022

In addition to Stats SA's accommodation report, the Department also subscribes to STR Global, which collects information from hotels on a monthly basis. The performance of the South African hotel industry for August 2022 compared to August 2021 is provided in table 8 below. It is important to note that the STR hotel data information for August 2022 and August 2021 is from a sample of 322 hotels that are drawn from a census/population of 429 hotels.

There was an increase recorded in all hotel performance indicators in August 2022 compared to August 2021. Hotel occupancy rate increased by 66,7% in August 2022 compared to August 2021, moving from an occupancy rate of 31,8% in August 2021 to 53,0% in August 2022. The Average Daily Rate (ADR) for August 2022 was R1 219,77 which was an increase of 18,9% compared to R1 025,53 seen in August 2021. The Revenue Per available room also increased by 98,3%; from R325,84 in August 2021 compared to R646,17 in August 2022.

Table 8: South Africa Hotel Performance: August 2021 compared to August 2022

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
August 2022	53,0%	66,7%	R1 219,77	18,9%	R646,17	98,3%	429	322
August 2021	31,8%		R1 025,53		R325,84			

Source: STR Hotel Data August 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: AUGUST 2022 COMPARED TO AUGUST 2021 AT CONSTANT 2019 PRICES (R MILLION)

The results in table 9 indicate that the total income (constant prices) for the food and beverages industry in August 2022 was about R5 584.0 million, which was an increase of 25,0% compared to R4 467.4 million in August 2021. All food and beverages industry categories showed an increase in income, with catering services having the highest increase of 43,9% followed by restaurants and coffee shops (29,6%) and take away and fast food with (13,3%).

Note: Food and beverages income at constant prices by type of enterprise and by type of income is estimated by deflating income at current prices using the relevant components of the consumer price index for restaurants.

Table 9: Total Income by type of Food and Beverage Industry: August 2022 compared to August 2021

Categories of Food and Beverages	AUGUST-22	AUGUST-21	% Change
Catering services (R million)	R882,9	R613,4	43,9%
Take-away and fast food outlets (R million)	R2 046,6	R1 806,5	13,3%
Restaurants and coffee shops (R million)	R2 654,5	R2 047,5	29,6%
Total Industry (R million)	R5 584,0	R4 467,4	25,0%

Source: Stats SA: August Food and beverages data cuts, 24 October 2022

The monthly percentage change of income from the food and beverages industry for August 2022 compared to August 2021 is provided in table 10 below. Income from the food and beverages industry recorded an increase of 25,0% during August 2022 compared to the same month in 2021. Comparing other months, the second highest increase has been recorded in August 2022 as seen in the table below.

Table 10: Monthly Change in Income from Food and Beverage Industry: August 2022 compared to August 2021 at constant 2019 prices (R million)

MONTH	2021	2022
January	-46,4%	45,6%
February	-35,3%	18,0%
March	-5,4%	15,2%
April	1 393,0%	13,2%
May	545,9%	7,7%
June	93,4%	21,3%
July	36,7%	55,8%
August	43,4%	25,0%

Source: Stats SA: August Food and beverages data cuts and report, 24 October 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: AUGUST 2022 COMPARED TO AUGUST 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during August 2022 compared to August 2021. Total passenger arrivals increased by 110,0%; from 586 947 in August 2021 to 1 232 833 in August 2022. International passengers showed the highest increase of 243,9 followed by regional (153,4%), domestic (82,3%) and unscheduled passengers (70,2%).

Table 11: Arriving Passengers: August 2022 compared to August 2021

Arriving Passengers	AUGUST-22	AUGUST-21	% Change
International	326 800	95 034	243,9%
Regional	34 431	13 590	153,4%
Domestic	865 448	474 708	82,3%
Unscheduled	6 154	3 615	70,2%
Total	1 232 833	586 947	110,0%

Source: ACSAs data cuts, August 2022

PASSENGER DEPARTURE MOVEMENT: AUGUST 2022 COMPARED TO AUGUST 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during August 2022 compared to August 2021. Total departing passengers increased by 112,2%; from 592 082 in August 2021 to 1 256 532 in August 2022. The table further indicates that international passengers departing had the highest increase of 250,2% followed by regional (160,2%), domestic (81,9%) and unscheduled passengers (61,0%).

Table 12: Departing Passengers: August 2022 compared to August 2021

Departing Passengers	AUGUST-22	AUGUST-21	% Change
International	354 428	101 203	250,2%
Regional	32 156	12 359	160,2%
Domestic	864 547	475 165	81,9%
Unscheduled	5 401	3 355	61,0%
Total	1 256 532	592 082	112,2%

Source: ACSAs data cuts, August 2022

References:

1. Statistics South Africa 25 October 2022, August Tourism and Migration report.
2. Statistics South Africa, August 2022, Accommodation data cuts.
3. Statistics South Africa, August 2022, Food and Beverage data cuts.
4. Airports Company South Africa, August 2022 data cuts.
5. STR Global RSA Hotel review data August 2022