

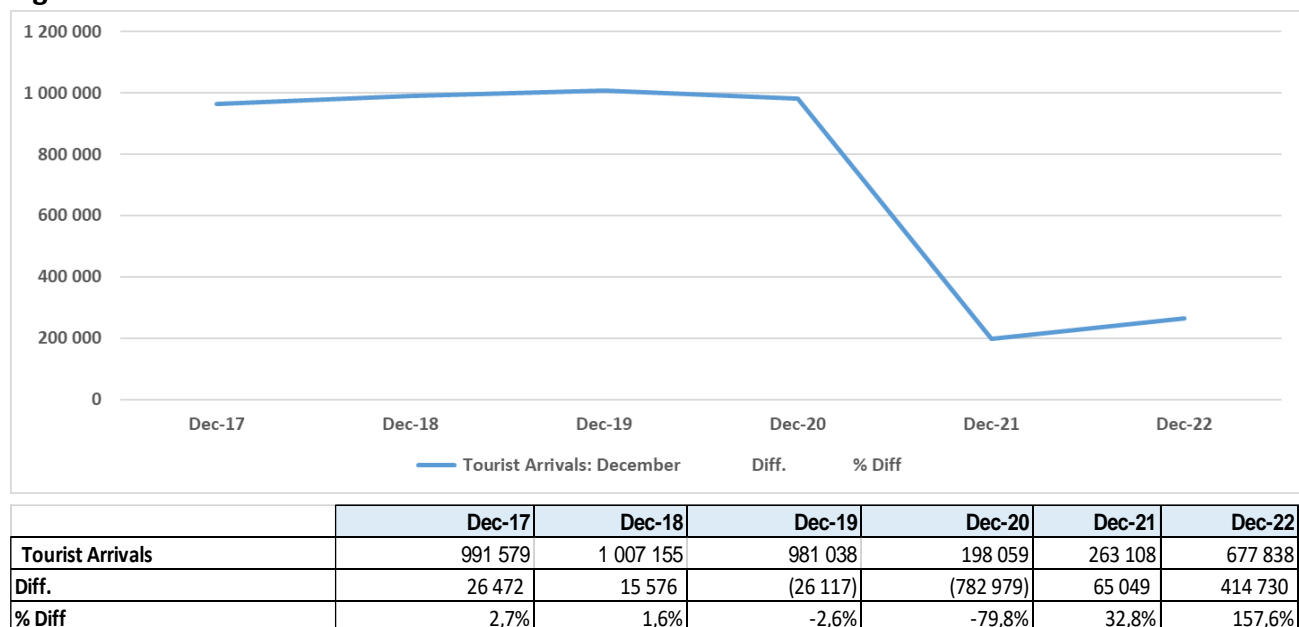
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR DECEMBER 2022

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 December 2022 and this report provides further analysis of the tourists that travelled to South Africa during this period.

TREND ANALYSIS: DECEMBER 2017 – DECEMBER 2022

A total of 677,838 tourist arrivals was recorded in December 2022, which was an increase of 157.6% (414,730) compared to the same month in 2021. Figure 1 below indicates tourist arrivals for the period December 2017 to December 2022. Tourist arrivals increased from 991,579 in 2017 to 1,007,155 in 2018, which was a growth of 1.6% (15,576). Tourist arrivals decreased from 1,007,155 in 2018 to 981,038 in 2019, which was a decrease of -2.6% (-26,117). Tourist arrivals decreased from 981,038 in 2019 to 198 059 in 2020, which was a decrease of -79.8% (-782,979). Tourist arrivals increased by 32,8% (65 049) in 2021 compared to 2020.

Figure 1: Total Tourist Arrivals December 2017 to December 2022



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

DECEMBER 2022 COMPARED TO DECEMBER 2021 BY REGION

Table 1 below indicates tourist arrivals by region for December 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 1,381,4% (+11,521) followed by Middle East (625.0%; +2,550) and Asia (263.4%; +8,784). Africa also recorded an increase of 130.2% (+274,903) and this region remains the main source of tourist arrivals to the country, accounting for 71.7% (486,112) of total tourist arrivals during December 2022.

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

Region	December 2022	December 2021	Diff	% Diff.
EUROPE	122 481	34 831	87 650	251,6%
NORTH AMERICA	37 517	11 163	26 354	236,1%
CENTRAL & SOUTH AMERICA	3 237	945	2 292	242,5%
AUSTRALASIA	12 355	834	11 521	1 381,4%
MIDDLE EAST	2 958	408	2 550	625,0%
ASIA	12 119	3 335	8 784	263,4%
TOTAL OVERSEAS	190 667	51 516	139 151	270,1%
AFRICA	486 112	211 209	274 903	130,2%
UNSPECIFIED	1 059	383	676	176,5%
GRAND TOTAL	677 838	263 108	414 730	157,6%

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

JANUARY-DECEMBER 2022 COMPARED TO JANUARY-DECEMBER 2021

Tourist arrivals figures by region for the period January-December 2022 compared to the period January-December 2021 are indicated in table 2 below. Total tourist arrivals went up by 152,6% for the period January-December 2022 compared to the period January-December 2021. This was a growth from a total of 2 255 699 tourist arrivals recorded during January-December 2021 to 5 698 062 during the period January-December 2022. Total tourist arrivals from the overseas market increased by 284,0% (+1 072 867). Australasia (1 223,8%) recorded the highest positive growth followed by Europe (314,6%), North America (232,6%), Middle East (223,1%), Central and South America (188,4%) and Asia (170,0%).

In Australasia, Australia recorded the highest increase in volume having an increase of 49,710 (+1,224.7%) followed by New Zealand (+10,433; 1,217.4%). The United Kingdom had recorded the highest increase in volume (+237,254; 518.3%) in the Europe region. In North America, the USA has recorded the highest increase in volume (+180,163; 219.7%). Israel had recorded the highest increase in volume for the Middle East region with an additional 14,053 tourists compared to January-December 2021. In Central and South America, Brazil recorded the highest increase in volume (+9,361; 174.5%) for the period under review. In Asia, India recorded the highest increase in volume (+37,844; 214.3%) during January-December 2022 compared to January-December 2021.

Tourist arrivals from Africa increased by 126.2% (+2,363,652) during the same period under review. In terms of volume, the increase recorded from the continent was driven by Zimbabwe (+823,060; 200.4%) followed by Lesotho (+480,666; 135.3%) and Mozambique (+421,442; 80.6%), refer to table 2.1 below.

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

Region	Jan-December 2022	Jan-December 2021	Diff	% Diff
EUROPE	900 703	217 241	683 462	314,6%
NORTH AMERICA	297 684	89 514	208 170	232,6%
CENTRAL & SOUTH AMERICA	28 516	9 889	18 627	188,4%
AUSTRALASIA	65 288	4 932	60 356	1 223,8%
MIDDLE EAST	40 628	12 574	28 054	223,1%
ASIA	117 852	43 654	74 198	170,0%
TOTAL OVERSEAS	1 450 671	377 804	1 072 867	284,0%
AFRICA	4 237 261	1 873 609	2 363 652	126,2%
UNSPECIFIED	10 130	4 286	5 844	136,4%
GRAND TOTAL	5 698 062	2 255 699	3 442 363	152,6%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period January-December 2022 compared to January-December 2021. Six of the top ten African source markets remained in the same position namely; Lesotho, Eswatini, Botswana, Namibia, Zambia and Malawi which ranked 3rd, 4th, 5th, 6th, 7th and 8th position during both periods. Zimbabwe, and Angola moved up their positions from 2nd to 1st and from 12th to 9th respectively in 2022 when compared to 2021. Angola replaced DRC in the top 10 during this period. All top ten countries recorded a positive growth with Angola recording the highest increase of 245.7% followed by Zimbabwe (200.4%) and Botswana (154.2%).

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

Country	Rank: December 2022	Tourist Arrivals Jan-Dec 2022	Rank: December 2021	Tourist Arrivals Jan-dec 2021	% Change from December 2021 to December 2022
Zimbabwe	1	1 233 790	2	410 730	200,4%
Mozambique	2	944 308	1	522 866	80,6%
Lesotho	3	835 921	3	355 255	135,3%
Eswatini	4	403 762	4	177 650	127,3%
Botswana	5	262 232	5	103 158	154,2%
Namibia	6	137 388	6	91 471	50,2%
Zambia	7	116 076	7	68 669	69,0%
Malawi	8	114 352	8	56 313	103,1%
Angola	9	32 194	12	9312	245,7%
Tanzania	10	26 268	9	13248	98,3%

Source: Stats SA Tourism and Migration Report, December 2022

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing January-December 2022 with January-December 2021, all top 10 overseas markets recorded an increase in tourist arrivals with Australia recording the highest increase of 1,224.7%. Half of the top ten overseas markets moved positions except for Germany, The Netherlands, France, India and Belgium which remained 3rd, 4th, 5th, 6th and 9th position respectively for the period under review. UK replaced the USA as the main source market from overseas, recording a growth of 518.3%. Russian Federation was replaced by Australia in the top 10 list during January-December 2022 compared to January-December 2021.

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

Country	Rank: December 2022	Tourist Arrivals Jan-Dec 2022	Rank: December 2021	Tourist Arrivals Jan-Dec 2021	% Change from December 2021 to December 2022
UK	1	283 031	2	45 777	518,3%
USA	2	262 183	1	82 020	219,7%
Germany	3	173 146	3	44 388	290,1%
The Netherlands	4	90 289	4	21 757	315,0%
France	5	76 077	5	19 761	285,0%
India	6	55 506	6	17 662	214,3%
Australia	7	53 769	19	4059	1,224,7%
Canada	8	35 501	10	7 494	373,7%
Belgium	9	34 826	9	9 106	282,5%
Switzerland	10	33 257	7	11 375	192,4%

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

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

November 2022
National State of Disaster lifted

ACCOMMODATION
No restrictions/regulations.
FOOD AND BEVERAGES
No restrictions/regulations.
AVIATION
No restrictions/regulations.

November 2021
Adjusted Alert Level One

ACCOMMODATION
All accommodation establishments and tour operators permitted to operate, subject to a restriction on the number of persons allowed in such establishments to not be more than 50 percent of the available floor space.
FOOD AND BEVERAGES
Restaurants all allowed to operate but subject to the strict adherence to all health protocols
AVIATION
Domestic air travel allowed.
International travel allowed.

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

2.1 ACCOMMODATION INDUSTRY: DECEMBER 2022

ACCOMMODATION INDUSTRY INCOME: DECEMBER 2022 COMPARED TO DECEMBER 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 December 2022 compared to December 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. In December 2022, the total income (current prices) from the accommodation industry showed an increase of 28.0% compared to December 2021. Total income from all of the different accommodation categories recorded an increase when compared to 2021. Total income from Caravan parks and camping sites recorded the highest increase of about 49.0% moving from R40.4 million in December 2021 to R60.2 million in December 2022.

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

Type of Accommodation	DECEMBER 2022				DECEMBER 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	December 2022 compared to December 2021
Hotels (R million)									
Caravan parks and camping sites (R million)									
Guest houses and guest farms (R million)									
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)									
Total Industry - (R million)									

Source: Stats SA: December Accommodation data cuts, 23 January 2023

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 44.6% during December 2022. All categories of accommodation showed an increase in income levels when compared to 2021. Total income from Caravan parks and camping sites recorded the highest increase of 62.4%; followed by Hotels (55.0%) and other accommodation (34.8%).

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

Type of Accommodation	DECEMBER 2022 Accommodation only	DECEMBER 2021 Accommodation only	% Change December 2022 compared to December 2021
Hotels (R million)			
Caravan parks and camping sites (R million)			
Guest houses and guest farms (R million)			
Other accommodation (R million)			

Type of Accommodation	DECEMBER 2022 Accommodation only	DECEMBER 2021 Accommodation only	% Change December 2022 compared to December 2021
Total Industry – (R million)			

Source: Stats SA: December Accommodation data cuts, 23 January 2023

The monthly percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) for January-December for the period 2021-2022 is provided in table 6 below. Income from accommodation showed an increase of 44.6% during December 2022 when compared to the same month in 2021.

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	2432.8%	31.3%
May	1735.5%	56.0%
June	671.8%	61.4%
July	274.9%	137.5%
August	126.1%	80.0%
September	72.7%	56.7%
October	52.5%	53.6%
November	66.4%	44.6%
December		

Source: Stats SA: December Accommodation data cuts, 23 January 2023

ACCOMMODATION INDUSTRY OCCUPANCY RATE: DECEMBER 2022 COMPARED TO DECEMBER 2021

Table 7 below indicates occupancy rates by accommodation type for December 2022 compared to December 2021. The total accommodation occupancy rate in December 2022 was 36.7%, which was an increase compared to 30.7% recorded in December 2021. The occupancy rate for all of the accommodation establishments increased in December 2022 compared to the same month in 2022.

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

Category	DECEMBER	
	2021	2022
Hotel		
Caravan Parks and Camping Sites		
Guest-Houses and Guest Farms		
Other Accommodation		
Total Accommodation		

Source: Stats SA: December Accommodation data cuts, 23 January 2023

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 December 2022 compared to December 2021 is provided in table 8 below. It is important to note that the STR hotel data information for December 2022 and December 2021 is from a sample of 311 hotels that are drawn from a census/population of 433 hotels.

There was an increase recorded in all hotel performance indicators in December 2022 compared to December 2021. Hotel occupancy rate increased by 21.8% in December 2022 compared to December 2021, moving from an occupancy rate of 52.2% in December 2021 to 63.5% in December 2022. The Average Daily Rate (ADR) for December 2022 was R1,415.2 which was an increase of 19.1% compared to R1,188.2 seen in December 2021. The Revenue Per available room also increased by 45.1%; from R619.7 in December 2021 compared to R899.1 in December 2022.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
December 2022								
December 2021								

Source: STR Hotel Data December 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: DECEMBER 2022 COMPARED TO DECEMBER 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 December 2022 was about R5,908.1 million, which was an increase of 15.6% compared to R5,110.9 million in December 2021. All food and beverages industry categories

showed an increase in income, with catering services having the highest increase of 26.1% followed by restaurants and coffee shops with (17.8%) and take away and fast food (9.0%).

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: December 2022 compared to December 2021 (Constant 2019 prices)

Categories of Food and Beverages	DECEMBER-2022	DECEMBER-2021	% Change
Catering services (R million)			
Take-away and fast food outlets (R million)			
Restaurants and coffee shops (R million)			
Total Industry (R million)			

Source: Stats SA: December Food and beverages data cuts, 23 January 2023

The monthly percentage change of income from the food and beverages industry for December 2022 compared to December 2021 is provided in table 10 below. Income from the food and beverages industry recorded an increase of 15.6% during December 2022 compared to the same month in 2021.

Table 10: Monthly Change in Income from Food and Beverage Industry: December 2022 compared to December 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	1393.0%	13.2%
May	545.9%	7.7%
June	93.4%	21.3%
July	36.7%	55.8%
August	43.4%	24.3%
September	26.8%	18.9%
October	26.7%	11.0%
November	12.6%	15.6%
December		

Source: Stats SA: December Food and beverages data cuts and report, 23 January 2023

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: DECEMBER 2022 COMPARED TO DECEMBER 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during December 2022 compared to December 2021. Total passenger arrivals increased by 29.6%; from 1,021,537 in December 2021 to 1,323,711 in December 2022. International passengers showed the highest increase of 82.2%, followed by regional (60.9%), % and domestic passengers (16.3%). Unscheduled passengers recorded the only decrease of -5.0% in 2022 when compared to 2021.

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

Arriving Passengers	DECEMBER-2022	DECEMBER-2021	% Change
International			
Regional			
Domestic			
Unscheduled			
Total			

Source: ACSAs data cuts, December 2022

PASSENGER DEPARTURE MOVEMENT: DECEMBER 2022 COMPARED TO DECEMBER 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during December 2022 compared to December 2021. Total departing passengers increased by 32.1% from 1,010,830 in December 2021 to 1,334,921 in December 2022. The table further indicates that international passengers departing had the highest increase of 98.3% followed by regional (50.3%), domestic passengers (16.9%) and unscheduled (0.4%).

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

Departing Passengers	DECEMBER-2022	DECEMBER-2021	% Change
International			
Regional			
Domestic			
Unscheduled			
Total			

Source: ACSAs data cuts, December 2022

References:

1. Statistics South Africa 1 January 2023, December Tourism and Migration report.
2. Statistics South Africa 23 January 2023, December 2022 Accommodation data cuts.
3. Statistics South Africa 23 January 2023, December 2022 Food and Beverage data cuts.
4. Airports Company South Africa December 2022 data cuts.
5. STR Global RSA Hotel review data December 2022.

