

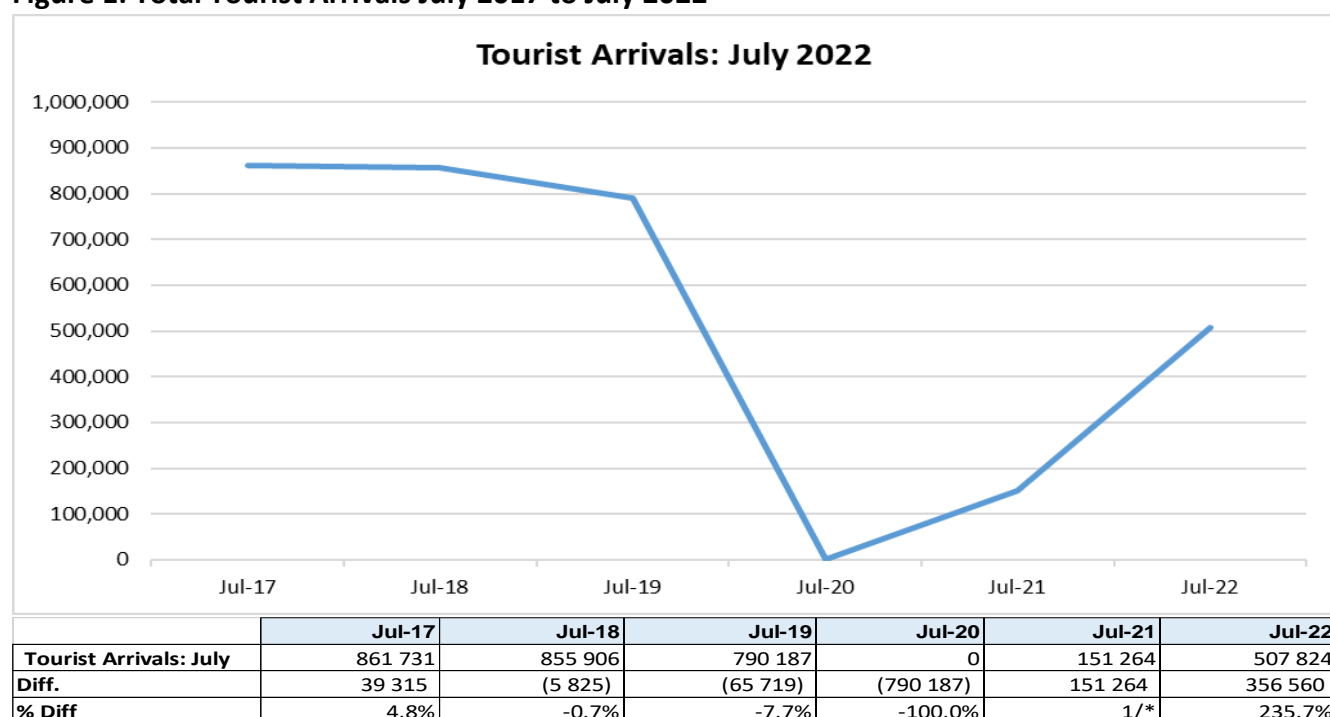
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR JULY 2022

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 July 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 July 2022 compared to July 2021 is also provided in this report.

TREND ANALYSIS: JULY 2017 – JULY 2022

A total of 507 824 tourist arrivals was recorded in July 2022, which was an increase of 235,7% (356 560) compared to the same month in 2021. Figure 1 below indicates tourist arrivals for the period July 2017 to July 2022. Tourist arrivals decreased from 861 731 in 2017 to 855 906 in 2018, which was a decline of -0,7% (5 825). Tourist arrivals further decreased from 855 906 in 2018 to 790 187 in 2019, which was a decrease of -7,7% (65 719). There were zero tourists recorded during July 2020 since the country was under lockdown level 4 which prevented tourists from entering the country.

Figure 1: Total Tourist Arrivals July 2017 to July 2022



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

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

JULY 2022 COMPARED TO JULY 2021 BY REGION

Table 1 below indicates tourist arrivals by region for July 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 1 834,6% (+4 660) followed by Europe (634,6%; +57 294) and Middle East (490,5%; +5 631). Africa also recorded an increase of 200,0% (+256 194) and this region remains the main source of tourist arrivals to the country, accounting for 75,7% (384 306) of total tourist arrivals during July 2022.

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

Region	July 2022	July 2021	Diff	% Diff.
EUROPE	66 322	9 028	57 294	634.6%
NORTH AMERICA	30 807	8 917	21 890	245.5%
CENTRAL & SOUTH AMERICA	3 095	642	2 453	382.1%
AUSTRALASIA	4 914	254	4 660	1 834.6%
MIDDLE EAST	6 779	1 148	5 631	490.5%
ASIA	10 803	2 888	7 915	274.1%
TOTAL OVERSEAS	122 720	22 877	99 843	436.4%
AFRICA	384 306	128 112	256 194	200.0%
UNSPECIFIED	798	275	523	190.2%
GRAND TOTAL	507 824	151 264	356 560	235.7%

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

JANUARY-JULY 2022 COMPARED TO JANUARY-JULY 2021

Tourist arrivals figures by region for the period January-July 2022 compared to the period January-July 2021 are indicated in table 2 below. Total tourist arrivals went up by 159,3% for the period January-July 2022 compared to the period January-July 2021. This was a growth from a total of 1 077 526 tourist arrivals recorded during January-July 2021 to 2 793 570 during the period January-July 2022. Total tourist arrivals from the overseas market increased by 430,3% (+559 796). Australasia (1 336,1%) recorded the highest positive growth followed by Europe (573,7%), North America (317,1%), Middle East (288,9%), Central and South America (272,1%) and Asia (179,1%).

In Australasia, Australia recorded the highest increase in volume having an increase of 20 681 (1 399,3%) followed by New Zealand (+3 499; 1 073,3%). The United Kingdom had recorded the highest increase in volume (+129 167; 1 125,8%) in the Europe region. In North America, the USA has recorded the highest increase in volume (+99 906; 298,8%). Israel had recorded the highest increase in volume for the Middle East region with an additional 6 339 tourists compared to January-July 2021. In Central and South America, Brazil recorded the highest increase in volume (+5 354, 272,6%) for the period under review.

Tourist arrivals from Africa increased by 122,9% (+1 153 318) during the same period under review. In terms of volume, the increase recorded from the continent was driven by Zimbabwe (+333 293; 154,4%) followed by Lesotho (+264 366; 143,8%) and Mozambique (+225 352; 84,0%), refer to table 2.1 below.

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

Region	Jan-July 2022	Jan-July 2021	Diff	% Diff
EUROPE	422 674	62 743	359 931	573.7%
NORTH AMERICA	148 866	35 690	113 176	317.1%
CENTRAL & SOUTH AMERICA	14 027	3 770	10 257	272.1%
AUSTRALASIA	26 022	1 812	24 210	1 336.1%
MIDDLE EAST	19 574	5 033	14 541	288.9%
ASIA	58 715	21 034	37 681	179.1%
TOTAL OVERSEAS	689 878	130 082	559 796	430.3%
AFRICA	2 098 807	945 489	1 153 318	122.0%
UNSPECIFIED	4 885	1 955	2 930	149.9%
GRAND TOTAL	2 793 570	1 077 526	1 716 044	159.3%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period January-July 2022 compared to January-July 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 354,0% followed by Botswana (172,5%) and Zimbabwe (154,4%).

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

Country	Rank: July 2022	Tourist Arrivals Jan-July 2022	Rank: July 2021	Tourist Arrivals Jan-July 2021	% Change from July 2021 to July 2022
Zimbabwe	1	549 224	2	215 931	154.4%
Mozambique	2	493 572	1	268 220	84.0%
Lesotho	3	448 192	3	183 826	143.8%
Eswatini	4	201 042	4	85 222	135.9%
Botswana	5	121 079	6	44 437	172.5%
Namibia	6	72 895	5	46 728	56.0%
Zambia	7	61 379	7	34 538	77.7%
Malawi	8	55 682	8	26 123	113.2%
Angola	9	16 211	12	3 571	354.0%
Tanzania	10	13 401	9	6 371	110.3%

Source: Stats SA Tourism and Migration Report, July 2022

Table 2.2 shows the rankings of the top ten Overseas source markets. Comparing January-July 2022 with January-July 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 1 125,8%. China, Pakistan and

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

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

Country	Rank: July 2022	Tourist Arrivals Jan-July 2022	Rank: July 2021	Tourist Arrivals Jan-July 2021	% Change from July 2021 to July 2022
UK	1	140 640	2	11 473	1 125.8%
USA	2	133 337	1	33 431	298.8%
Germany	3	76 327	3	10 278	642.6%
The Netherlands	4	42 890	6	5 366	699.3%
France	5	36 109	5	6 414	463.0%
India	6	28 084	4	7 528	273.1%
Australia	7	22 159	19	1 478	1 399.3%
Belgium	8	16 563	12	2 523	556.5%
Switzerland	9	15 846	10	2 661	495.5%
Canada	10	15 529	14	2 259	-100.0%

Source: Stats SA Tourism and Migration Report, July 2022

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

The next section of the report is about the performance of tourism-related industries during July 2022 compared to July 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 July 2022 and July 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 food and beverages and aviation industries for the period July 2022 and July 2021

July 2022 National State of Disaster lifted	July 2021 Adjusted Alert Level Four & Three
ACCOMMODATION No restrictions/regulations.	ACCOMMODATION Adjusted Alert Level 4 & 3 - 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. Interprovincial travel is permitted.
FOOD AND BEVERAGES No restrictions/regulations.	FOOD AND BEVERAGES Adjusted Alert Level 4 - Restaurants and bars are closed except for sale for off-site consumption of food and non-alcohol beverages. Adjusted Alert Level 3 - Restaurants all allowed to operate but subject to the strict adherence to all health protocols and curfew. Sale of alcohol permitted.
AVIATION No restrictions/regulations.	AVIATION Adjusted Alert Level 3 - Domestic and International air travel allowed. Adjusted Alert Level 4 - Domestic air travel for business only. International air travel not permitted.

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

2.1 ACCOMMODATION INDUSTRY: JULY 2022

ACCOMMODATION INDUSTRY INCOME: JULY 2022 COMPARED TO JULY 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 July 2022 compared to July 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. In July 2022, the total income (current prices) from the accommodation industry showed an increase of 191,6% compared to July 2021. Total income from all of the categories recorded an increase and total income from hotels recorded the highest increase of about 305,9% moving from R622,8 million in July 2021 to R2 528,1 million in July 2022.

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

Type of Accommodation	JULY 2022				JULY 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	July 2022 compared to July 2021
Hotels (R million)	R449.6	R883.0	R1,195.5	R2,528.1	R86.2	R241.4	R295.2	R622.8	305.9%
Caravan parks and camping sites (R million)	R11.8	R50.3	R4.9	R67.0	R4.1	R47.1	R3.0	R54.2	23.6%
Guest houses and guest farms (R million)	R14.2	R103.0	R5.1	R122.3	R4.9	R30.5	R2.8	R38.2	220.2%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R88.6	R774.3	R37.5	R900.4	R72.1	R435.3	R18.1	R525.5	71.3%
Total Industry - (R million)	R564.2	R1,810.6	R1,243.0	R3,617.8	R167.3	R754.3	R319.1	R1,240.7	191.6%

Source: Stats SA: July Accommodation data cuts, 28 September 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 140,0% during July 2022. All categories of accommodation showed an increase in income levels with hotels recording the highest increase of 265,8%; followed by guest houses and guest farms (237,7%), other accommodation (77,9%) and caravan parks and camping sites (6,8%).

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

Type of Accommodation	July 2022 Accommodation only	July 2021 Accommodation only	% Change July 2022 compared to July 2021
Hotels (R million)	R883.0	R241.4	265.8%
Caravan parks and camping sites (R million)	R50.3	R47.1	6.8%
Guest houses and guest farms (R million)	R103.0	R30.5	237.7%
Other accommodation (R million)	R774.3	R435.3	77.9%
Total Industry – (R million)	R1,810.6	R754.3	140.0%

Source: Stats SA: July Accommodation data cuts, 28 September 2022

The monthly percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) for January-July for the period 2021-2022 is provided in table 6 below. Income from accommodation showed an increase of 140,0% during July 2022 when compared to the same month in 2021 and this was the 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	2432.8%	31.3%
May	1735.5%	56.0%
June	671.8%	61.4%
July	274.9%	140.0%

Source: Stats SA: July Accommodation data cuts, 28 September 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JULY 2022 COMPARED TO JULY 2021

Table 7 below indicates occupancy rates by accommodation type for July 2022 compared to July 2021. The total accommodation occupancy rate in July 2022 was 35,5%, which was an increase compared to 16,4% recorded in July 2021. The occupancy rate for all of the accommodation establishments increased in July 2022 compared to the same month last year.

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

Category	July	
	2021	2022
Hotel	12.8%	35.6%
Caravan Parks and Camping Sites	43.7%	49.0%
Guest-Houses and Guest Farms	9.3%	22.7%
Other Accommodation	21.6%	38.0%
Total Accommodation	16.4%	35.5%

Source: Stats SA: July Accommodation data cuts, 28 September 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 July 2022 compared to July 2021 is provided in table 8 below. It is important to note that the STR hotel data information for July 2022 and July 2021 is from a sample of 324 hotels that are drawn from a census/population of 426 hotels.

There was an increase recorded in all hotel performance indicators in July 2022 compared to July 2021. Hotel occupancy rate increased by 198,6% in July 2022 compared to July 2021, moving from an occupancy rate of 17,9% in July 2021 to 53,3% in July 2022. The Average Daily Rate (ADR) for July 2022 was R1 196.4 which was an increase of 21,3% compared to R986.2 seen in July 2021. The Revenue Per available room also increased by 262,2%; from R176.2 in July 2021 compared to R638.1 in July 2022.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
JULY 2022	53.3	198.6	R1,196.4	21.3	R638.1	262.2	426	324
JULY 2021	17.9		R986.2		R176.2			

Source: STR Hotel Data July 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JULY 2022 COMPARED TO JULY 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 July 2022 was about R5 745.1 million, which was an increase of 55,8% compared to R3 687.7 million in July 2021. All food and beverages industry categories showed an increase in income, with restaurants and coffee shops having the highest increase of 82,6% followed by catering services (52,3%) and take away and fast food with (32,0%).

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: July 2022 compared to July 2021

Categories of Food and Beverages	July-22	July-21	% Change
Catering services (R million)	R817.0	R536.5	52.3%
Take-away and fast food outlets (R million)	R2,153.4	R1,631.6	32.0%
Restaurants and coffee shops (R million)	R2,774.7	R1,519.6	82.6%
Total Industry (R million)	R5,745.1	R3,687.7	55.8%

Source: Stats SA: Food and beverages data cuts, 19 September 2022

The monthly percentage change of income from the food and beverages industry for July 2022 compared to July 2021 is provided in table 10 below. Income from the food and beverages industry recorded an increase of 55,8% during July 2022 compared to the same month in 2021. Comparing other months, the highest increase has been recorded in July 2022 as seen in the table below.

Table 10: Monthly change in Income from food and beverage industry: July 2022 compared to July 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%

Source: Stats SA: July Food and beverages data cuts and report, 19 September 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: JULY 2022 COMPARED TO JULY 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during July 2022 compared to July 2021. Total passenger arrivals increased by 251,7%; from 359 781 in July 2021 to 1 265 359 in July 2022. International passengers showed the highest increase of 352,8% followed by regional (255,7%), domestic (222,8%) and unscheduled passengers (157,1%).

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

Arriving Passengers	July-22	July-21	% Change
International	357 653	78 988	352.8%
Regional	32 727	9 200	255.7%
Domestic	867 786	268 795	222.8%
Unscheduled	7 193	2 798	157.1%
Total	1 265 359	359 781	251.7%

PASSENGER DEPARTURE MOVEMENT: JULY 2022 COMPARED TO JULY 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during July 2022 compared to July 2021. Total departing passengers increased by 225,5%; from 371 838 in July 2021 to 1 210 338 in July 2022. The table further indicates that international passengers departing had the highest increase of 246,8% followed by regional (226,9%), domestic (219,6%) and unscheduled passengers (127,2%).

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

Departing Passengers	July-22	July-21	% Change
International	306 269	88 315	246.8%
Regional	31 705	9 698	226.9%
Domestic	865 713	270 897	219.6%
Unscheduled	6 651	2 928	127.2%
Total	1 210 338	371 838	225.5%

Source: ACSAs data cuts, July 2022

References:

1. Statistics South Africa 27 September 2022, Tourism and Migration report.
2. Statistics South Africa, July 2022, Accommodation data cuts.
3. Statistics South Africa, July 2022, Food and Beverage data cuts.
4. Airports Company South Africa, July 2022 data cuts.
5. STR Global RSA Hotel review data July 2022