

## **SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR MAY 2022**

**NOTE:** 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 from 27 March 2020, which prevented the movement of people entering and leaving South Africa. As a result of the increased levels of infection, the government announced the National State of Disaster. As part of the National State of Disaster, the South African government adopted the risk adjustment strategy that aimed to increase economic activity while putting measures in place to reduce the transmission of the virus. Five (5) Coronavirus alert levels were introduced, which indicated the different sectors that can operate under these levels. Under levels 2-5, the risk adjustment strategy prevented international tourists from entering the borders of South Africa which included the months of May-September 2020. However, exceptions were made for other South Africans and travellers from other countries to return to their country of residence. Furthermore, permission was also given to people transporting specific cargo and permitted retail goods to neighbouring countries, which included all goods imported via South African ports of entry, for re-export to neighbouring countries.

On the 05<sup>th</sup> 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 therefore published data on the number of tourists during May 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 May 2022 compared to May 2021 is also provided in this report.

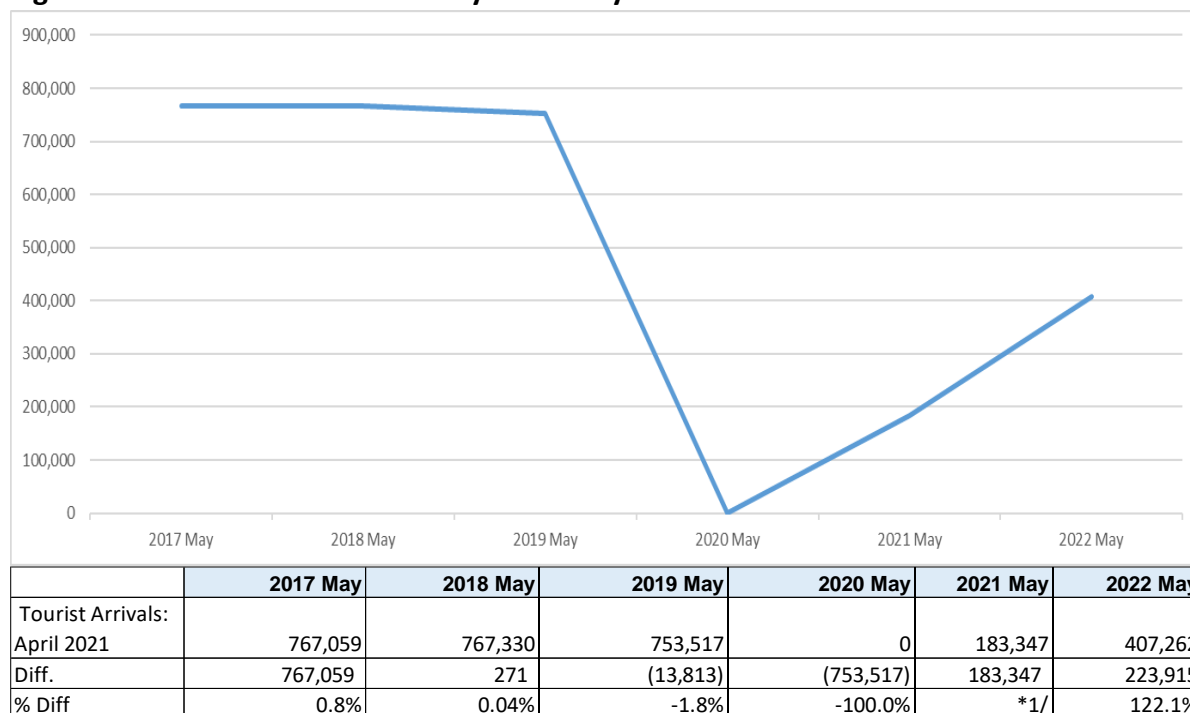
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### **TREND ANALYSIS: MAY 2017 – MAY 2022**

A total of 407 262 tourist arrivals was recorded in May 2022, which was an increase of 122,1% (223 915) compared to the same month in 2021. The increase experienced in May 2022 compared to the same month in the previous year could be a result of the easing of COVID-19 travel regulations and the availability of COVID-19 vaccines in many countries across the globe.

Figure 1 below indicates tourist arrivals for the period May 2017 to May 2022. Tourist arrivals increased from 767 059 in 2017 to 767 330 in 2018, which was a slight increase of 0,04% (271). Tourist arrivals decreased from 767 330 in 2018 to 753 517 in 2019, which was a decrease of -1,8% (-13 813). There were zero tourists recorded during May 2020 since the country was under lockdown level 4 which prevented tourists from entering the country.

**Figure 1: Total Tourist Arrivals: May 2017-May 2022**



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

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

## MAY 2022 COMPARED TO MAY 2021 BY REGION

Table 1 below indicates tourist arrivals by region for May 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 1 391,1% (4 076) followed by Europe (375,1%; 35 632) and North America (307,1%; 20 002). Africa also recorded an increase of 93,6% (151 853) and this region remains the main source of tourist arrivals to the country, accounting for 77,1% (314 070) of total tourist arrivals during May 2022.

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

Region	May 2022	May 2021	Diff	% Diff.
EUROPE	45,131	9,499	35,632	375.1%
NORTH AMERICA	26,516	6,514	20,002	307.1%
CENTRAL & SOUTH AMERICA	2,376	608	1,768	290.8%
AUSTRALASIA	4,369	293	4,076	1 391.1%
MIDDLE EAST	2,508	658	1,850	281.2%
ASIA	11,468	3,190	8,278	259.5%
TOTAL OVERSEAS	92,368	20,762	71,606	344.9%
AFRICA	314,070	162,217	151,853	93.6%
Unspecified	824	368	456	123.9%
GRAND TOTAL	407,262	183,347	223,915	122.1%

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

## JANUARY-MAY 2022 COMPARED TO JANUARY-MAY 2021

Tourist arrivals figures by region for the period January-May 2022 compared to the same period in 2021 are indicated in table 2 below. Total tourist arrivals went up by 152,3% (1 138 661) for the period January-May 2022 compared to the same period in 2021. Total tourist arrivals from the overseas market increased by 480,1% (396 816). Australasia (1 234,6%) recorded the highest increase followed by Europe (608,5%), North America (413,6%), Middle East (323,4%), Central and South America (264,7%) and Asia with an increase of 156,7%.

In Australasia, Australia recorded the highest increase in volume having an increase of 13 377 (1 303,8%) followed by New Zealand (2 010; 934,9%). The United Kingdom had recorded the highest increase in volume (101 178; 1 234,8%) in the Europe region. In North America, the USA has recorded the highest increase in volume (61 314; 391,0%). Israel had recorded the highest increase in volume for the Middle East region with an additional 4 233 tourists compared to January-May 2021. In Central and South America, Brazil recorded the highest increase in volume (3 258; 245,3%) for the period under review.

Tourist arrivals from Africa increased by 111,5% (739 942) during the same period under review and this region remains the main source of tourist arrivals to the country, accounting for 88,8% (1,403,470) of total tourist arrivals during Jan-May 2022. In terms of volume, the increase recorded from the continent was driven by an increase of (191 921; 122,6%) from Zimbabwe, followed by Lesotho (173 173; 137,6%) and Mozambique (164 984; 89,7%), refer to table 2 below.

**Table 2: Total Tourist Arrivals by Region January-May 2022 vs. January-May 2021**

Region	Jan-May 2022	Jan-May 2021	Diff	% Diff
EUROPE	319,045	45,034	274,011	608.5%
NORTH AMERICA	87,671	17,069	70,602	413.6%
CENTRAL & SOUTH AMERICA	8,862	2,430	6,432	264.7%
AUSTRALASIA	16,656	1,248	15,408	1 234.6%
MIDDLE EAST	9,934	2,346	7,588	323.4%
ASIA	37,305	14,530	22,775	156.7%
<b>TOTAL OVERSEAS</b>	<b>479,473</b>	<b>82,657</b>	<b>396,816</b>	<b>480.1%</b>
<b>TOTAL AFRICA</b>	<b>1,403,470</b>	<b>663,528</b>	<b>739,942</b>	<b>111.5%</b>
Unspecified	3,253	1,350	1,903	141.0%
<b>GRAND TOTAL</b>	<b>1,886,196</b>	<b>747,535</b>	<b>1,138,661</b>	<b>152.3%</b>

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

Table 2.1 below gives the rankings of the top ten African source markets for the period May 2022 compared to May 2021. More than half of the top ten African source markets remained in their positions namely, Mozambique, Zimbabwe, Eswatini, Zambia and Malawi which ranked 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> positions respectively during both periods. Botswana, Angola and Tanzania all moved up their positions in 2022 when compared to 2021. Namibia dropped from 5<sup>th</sup> position in 2021 to 6<sup>th</sup> position in 2022. Tanzania and Angola replaced Nigeria and DRC in the top 10 list

for May 2022. All top ten countries recorded a positive growth with Angola recording the highest increase of 459,8% followed by Botswana (155,0%) and Lesotho (137,6%).

**Table 2.1: South Africa's Top 10 African Source Markets: Jan-May 2022 compared to Jan-May 2021**

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
Mozambique	1	348,928	1	183,944	89.7%
Zimbabwe	2	348,437	2	156,516	122.6%
Lesotho	3	299,019	3	125,846	137.6%
Eswatini	4	129,345	4	60,164	115.0%
Botswana	5	80,479	6	31,559	155.0%
Namibia	6	50,743	5	35,271	43.9%
Zambia	7	42,111	7	24,380	72.7%
Malawi	8	37,416	8	16,862	121.9%
Angola	9	11,363	14	2,030	459.8%
Tanzania	10	9,313	11	4,327	115.2%

*Source: Stats SA Tourism and Migration Report, May 2022*

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing May 2022 with May 2021, all top 10 overseas markets recorded an increase in tourist arrivals. Germany is the only country which remained in 3<sup>rd</sup> position during both periods. UK replaced the USA as the main source market from overseas, recording a growth of 1 234,8%. Russian Federation, China and Pakistan were replaced by Australia, Belgium and Canada during the period under review. Australia moved from 18<sup>th</sup> position in 2021 to 7<sup>th</sup> position in 2022 while Canada moved from the 14<sup>th</sup> position in 2021 to the 10<sup>th</sup> position in May 2022.

**Table 2.2: South Africa's Top 10 Overseas Source Markets: Jan-May 2022 compared to Jan-May 2021**

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
UK	1	109,372	2	8,194	1 234.8%
USA	2	76,994	1	15,680	391.0%
Germany	3	63,048	3	8,014	686.7%
The Netherlands	4	28,823	7	3,557	710.3%
France	5	25,901	5	4,832	436.0%
India	6	17,267	4	5,308	225.3%
Australia	7	14,403	18	1,026	1 303.8%
Switzerland	8	12,574	10	1,847	580.8%
Belgium	9	10,719	11	1,735	517.8%
Canada	10	10,677	14	1,389	668.7%

*source: Stats SA Tourism and Migration Report, May 2022*

## PERFORMANCE OF SOUTH ATOURISM-RELATED RELATED INDUSTRIES: MAY 2022 COMPARED TO MAY 2021

The next section of the report is about the performance of tourism-related related industries during May 2022 compared to May 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 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 May 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](http://www.gov.za/coronavirus).

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

May 2022 National State of Disaster lifted	May 2021 Adjusted Alert Level One
<b>ACCOMMODATION</b>	<b>ACCOMMODATION</b>
No restrictions.	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.
<b>FOOD AND BEVERAGES</b>	<b>FOOD AND BEVERAGES</b>
No restrictions.	Restaurants all allowed to operate but subject to the strict adherence to all health protocols
<b>AVIATION</b>	<b>AVIATION</b>
No restrictions.	Domestic air travel allowed. International travel allowed.

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

## 2.1 ACCOMMODATION INDUSTRY: MAY 2022

### ACCOMMODATION INDUSTRY INCOME: MAY 2022 COMPARED TO MAY 2021

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 May 2022 compared to May 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During May 2022, the total income (current prices) from the accommodation industry showed an increase of 86,6% compared to May 2021. Total income from most categories of accommodation recorded an increase except caravan parks and camp sites with a decrease of -3,3%. Total income from hotels recorded the highest increase of about 114,9% moving from R1 081,5 million in May 2021 to R2 324,0 million in May 2022.

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

Type of Accommodation	May 2022				May 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	May 2022 compared to May 2021
Hotels (R million)	R429.4	R847.6	R1,047.0	R2,324.0	R240.6	R438.8	R402.1	R1,081.5	114.9%
Caravan parks and camping sites (R million)	R0.4	R22.9	R0.4	R23.7	R0.4	R23.9	R0.2	R24.5	-3.3%
Guest houses and guest farms (R million)	R6.4	R78.0	R1.9	R86.3	R5.3	R50.0	R1.6	R56.9	51.7%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R71.8	R537.2	R43.8	R652.8	R57.0	R406.9	R27.1	R491.0	33.0%
<b>Total Industry - (R million)</b>	<b>R508.0</b>	<b>R1,485.7</b>	<b>R1,093.1</b>	<b>R3,086.8</b>	<b>R303.3</b>	<b>R919.6</b>	<b>R431.0</b>	<b>R1,653.9</b>	<b>86.6%</b>

Source: Stats SA: May Accommodation data cuts, 18 July 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 61,6% during May 2022. Most categories of accommodation showed an increase in income levels with hotels recording the highest increase of 93,2%; followed by guest houses and guest farms (56,0%) and other accommodation (32,0%). However, Caravan parks and camping sites declined by -4,2%.

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

Type of Accommodation	May 2022 Accommodation only	May 2021 Accommodation only	% Change MAY 2022 compared to May 2021
Hotels (R million)	R847.6	R438.8	93.2%
Caravan parks and camping sites (R million)	R22.9	R23.9	-4.2%
Guest houses and guest farms (R million)	R78.0	R50.0	56.0%
Other accommodation (R million)	R537.2	R406.9	32.0%
<b>Total Industry – (R million)</b>	<b>R1,485.7</b>	<b>R919.6</b>	<b>61.6%</b>

Source: Stats SA: May Accommodation data cuts, 18 July 2022

The monthly percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) for January-May for the period 2021-2022 is provided in table 6 below. Income from accommodation showed an increase of 61,6% during May 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	-70.9%	65.5%
February	-75.1%	109.3%
March	-40.6%	76.8%
April	2291.1%	42.5%
May	1724.6%	61.6%

Source: Stats SA: May Accommodation data cuts, 18 July 2022

## **ACCOMMODATION INDUSTRY OCCUPANCY RATE: MAY 2022 COMPARED TO MAY 2021**

Table 7 below indicates occupancy rates by accommodation type for May 2022 compared to May 2021. The total accommodation occupancy rate in May 2022 was 31,5%, which was an increase compared to 23,8% recorded in May 2021. The occupancy rate for most of the accommodation establishments increased in May 2022 compared to the same month last year except for caravan parks and camping sites, which showed a decline moving from 35,9% in May 2021 to 29,4% in May 2022.

**Table 7: Occupancy Rate: May 2022 compared to May 2021**

Category	May	
	2021	2022
Hotel	22,5%	34,7%
Caravan Parks and Camping Sites	35,9%	29,4%
Guest-Houses and Guest Farms	14,5%	17,9%
Other Accommodation	25,9%	30,8%
Total Accommodation	23,8%	31,5%

Source: Stats SA: May Accommodation data cuts, 18 July 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 May 2022 compared to May 2021 is provided in table 8 below. It is important to note that the STR hotel data information for May 2022 and May 2021 is from a sample of 320 hotels that are drawn from a census/population of 429 hotels. There was an increase recorded in all hotel performance indicators in May 2022 compared to May 2021. Hotel occupancy rate increased by 46,1% in May 2022 compared to May 2021, moving from an occupancy rate of 34,6% in May 2021 to 50,6% in May 2022. The Average Daily Rate (ADR) for May 2022 was R1 231,3 which was an increase of 22,0% compared to R1 009.0 seen in May 2021. The Revenue Per available room also increased by 78,3%; from R349,2 in May 2021 compared to R622,7 in May 2022.

**Table 8: South Africa Hotel Performance: May 2021 compared to May 2022**

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
MAY 2022	50.6%	46.1%	R1,231.3	22.0%	R622.7	78.3%	429	320
MAY 2021	34.6%		R1,009.0		R349.2			

Source: STR Hotel Data May 2022

## 2.2 FOOD AND BEVERAGES INDUSTRY

### FOOD AND BEVERAGES INDUSTRY INCOME: MAY 2022 COMPARED TO MAY 2021 AT CONSTANT 2015 PRICES

The results in table 9 indicates that the total income for the food and beverages industry in May 2022 was about R5 093,9 million, which was an increase of 8,3% compared to R4 702,8 million in May 2021. All food and beverages industry categories showed an increase in income, with catering services having the highest increase of 17,4%% followed by take-away and fast food outlets (9,0%) and restaurant and coffee shops (5,1%). *Please note food and beverages at constant prices are 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: May 2022 compared to May 2021 at constant prices**

Categories of Food and Beverages	May-22	May-21	% Change
Catering services (R million)	R830.7	R707.8	17.4%
Take-away and fast food outlets (R million)	R1,784.2	R1,637.2	9.0%
Restaurants and coffee shops (R million)	R2,479.0	R2,357.8	5.1%
<b>Total Industry (R million)</b>	<b>R5,093.9</b>	<b>R4,702.8</b>	<b>8.3%</b>

*Source: Stats SA: Food and beverages data cuts, 18 July 2022*

The monthly percentage change of income from the food and beverages industry for January-May 2022 compared to the same months in 2021 is provided in table 10 below. Income from the food and beverages industry recorded an increase of 8,3% during May 2022 compared to the same month in 2021.

**Table 10: Year on Year Change in income from food and beverage industry: May 2022 compared to May 2021**

MONTH	2021	2022
January	-46.9%	46.8%
February	-35.4%	16.9%
March	-4.6%	14.4%
April	1292.5%	13.1%
<b>May</b>	<b>526.5%</b>	<b>8.3%</b>

*Source: Stats SA: May Food and beverages data cuts and report, 18 July 2022*

## 2.3 AVIATION

### PASSENGER ARRIVALS MOVEMENT: MAY 2022 COMPARED TO MAY 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during May 2022 compared to May 2021. Total passenger arrivals increased by 54,2%; from 784 989 in May 2021 to 1 210 343 in May 2022. International passengers showed the highest increase of 241,0% followed by regional (146,7%), unscheduled passengers (54,2%) and domestic (31,5%).

**Table 11: Arriving Passengers: May 2022 compared to May 2021**

Arriving Passengers	May-22	May-21	% Change
International	265,436	77,835	241.0%
Regional	29,062	11,781	146.7%
Domestic	910,410	692,224	31.5%
Unscheduled	5,435	3,149	72.6%
<b>Total</b>	<b>1,210,343</b>	<b>784,989</b>	<b>54.2%</b>

*Source: ACSAs data cuts, May 2022*

### PASSENGER DEPARTURE MOVEMENT: MAY 2022 COMPARED TO MAY 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during May 2022 compared to May 2021. Total departing passengers increased by

57,2%; from 790 717 in May 2021 to 1 243 009 in May 2022. The table further indicates that international passengers departing had the highest increase of 264,3% followed by regional (128,1%), unscheduled passengers (8,9,2%) and domestic (31,6%).

**Table 12: Departing Passengers: May 2022 compared to May 2021**

<b>Departing Passengers</b>	<b>May-22</b>	<b>May-21</b>	<b>% Change</b>
International	294,888	80,936	264.3%
Regional	29,345	12,864	128.1%
Domestic	912,737	693,725	31.6%
Unscheduled	6,039	3,192	89.2%
<b>Total</b>	<b>1,243,009</b>	<b>790,717</b>	<b>57.2%</b>

*Source: ACSAs data cuts, May 2022*

#### **References:**

1. Statistics South Africa July 26<sup>th</sup> 2022, Tourism and Migration report.
2. Statistics South Africa, 18 July 2022, May 2022 Accommodation data cuts.
3. Statistics South Africa, 18 July 2022, May 2022 Food and Beverage data cuts.
4. Airports Company South Africa, May 2022 data cuts.
5. STR Global RSA Hotel review data May 2022.