

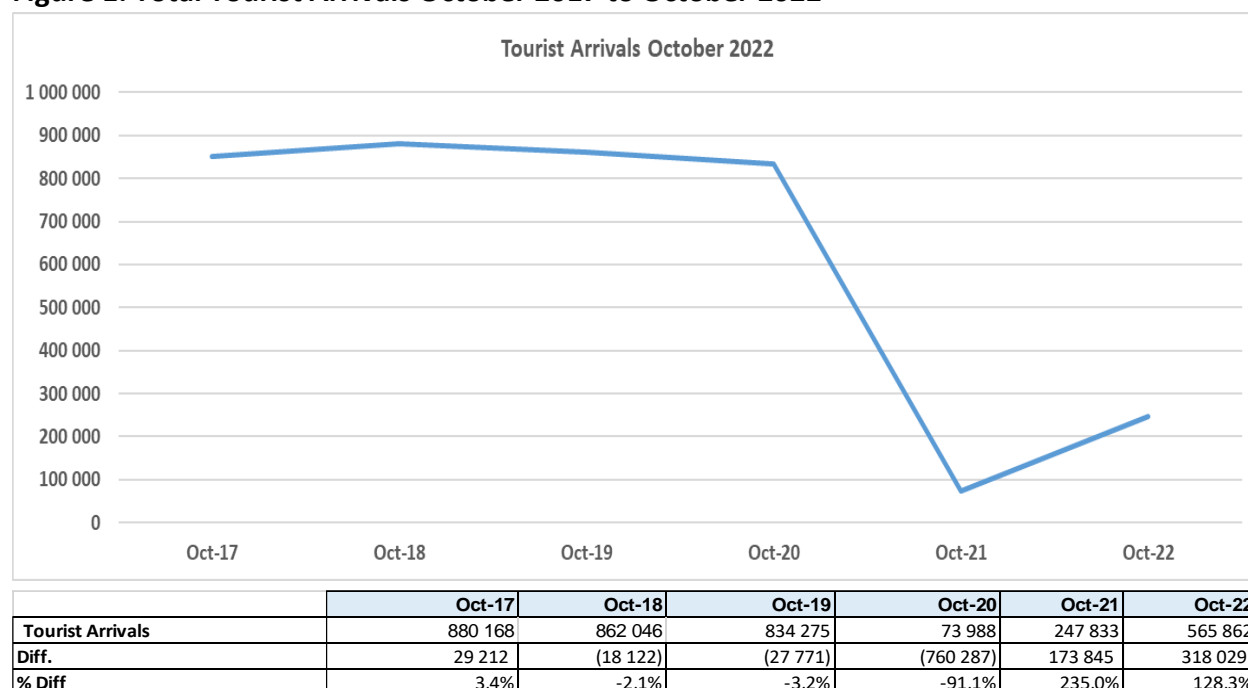
SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR OCTOBER 2022

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

TREND ANALYSIS: OCTOBER 2017 – OCTOBER 2022

A total of 565 862 tourist arrivals was recorded in October 2022, which was an increase of 128,3% (318 029) compared to the same month in 2021. Figure 1 below indicates tourist arrivals for the period October 2017 to October 2022. Tourist arrivals decreased from 880 168 in 2017 to 862 046 in 2018, which was a decline of -2,1% (-18 112). Tourist arrivals further decreased from 862 046 in 2018 to 834 275 in 2019, which was decrease of -3,2% (-27 771). There were 73 988 tourists recorded during October 2020.

Figure 1: Total Tourist Arrivals October 2017 to October 2022



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

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

OCTOBER 2022 COMPARED TO OCTOBER 2021 BY REGION

Table 1 below indicates tourist arrivals by region for October 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 1 020,8% (+5 880) followed by Europe (153,4%; +60 063) and North America (147,8%; +16 056). Africa also recorded an increase of 120,1% (+225 644) and this region remains the main source of tourist arrivals to the country, accounting for 73,1% (413 481) of total tourist arrivals during October 2022.

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

Region	October 2022	October 2021	Diff	% Diff.
EUROPE	99 207	39 144	60 063	153,4%
NORTH AMERICA	26 922	10 866	16 056	147,8%
CENTRAL & SOUTH AMERICA	2 957	1 633	1 324	81,1%
AUSTRALASIA	6 456	576	5 880	1 020,8%
MIDDLE EAST	3 123	1 726	1 397	80,9%
ASIA	12 524	5 530	6 994	126,5%
TOTAL OVERSEAS	151 189	59 475	91 714	154,2%
AFRICA	413 481	187 837	225 644	120,1%
UNSPECIFIED	1 192	521	671	128,8%
GRAND TOTAL	565 862	247 833	318 029	128,3%

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

JANUARY-OCTOBER 2022 COMPARED TO JANUARY-OCTOBER 2021

Tourist arrivals figures by region for the period January-October 2022 compared to the period January-October 2021 are indicated in table 2 below. Total tourist arrivals went up by 159,4% for the period January-October 2022 compared to the period January-October 2021. This was a growth from a total of 1 716 944 tourist arrivals recorded during January-October 2021 to 4 454 466 during the period January-October 2022. Total tourist arrivals from the overseas market increased by 335,5% (+847 624). Australasia (1 401,6%) recorded the highest positive growth followed by Europe (409,9%), North America (253,0%), Middle East (251,6%), Central and South America (207,4%) and Asia (168,8%).

In Australasia, Australia recorded the highest increase in volume having an increase of 35 454 (+1 429,6%) followed by New Zealand (+7 003; 1 277,9%). The United Kingdom had recorded the highest increase in volume (+190 085; 834,0%) in the Europe region. In North America, the USA has recorded the highest increase in volume (+146 129; 238,8%). Israel had recorded the highest increase in volume for the Middle East region with an additional 11 886 tourists compared to January-October 2021. In Central and South America, Brazil recorded the highest increase in volume (+7 672, 197,0%) for the period under review.

Tourist arrivals from Africa increased by 129,0% (+1 885 166) during the same period under review. In terms of volume, the increase recorded from the continent was driven by Zimbabwe (+624 088; 193,6%) followed by Lesotho (+389 941; 140,6%) and Mozambique (+337 573; 81,4%), refer to table 2.1 below.

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

Region	Jan-October 2022	Jan-October 2021	Diff	% Diff
EUROPE	670 743	131 550	539 193	409,9%
NORTH AMERICA	233 477	66 133	167 344	253,0%
CENTRAL & SOUTH AMERICA	22 449	7 303	15 146	207,4%
AUSTRALASIA	45 649	3 040	42 609	1 401,6%
MIDDLE EAST	34 253	9 743	24 510	251,6%
ASIA	93 662	34 840	58 822	168,8%
TOTAL OVERSEAS	1 100 233	252 609	847 624	335,5%
AFRICA	3 346 259	1 461 093	1 885 166	129,0%
UNSPECIFIED	7 974	3 242	4 732	146,0%
GRAND TOTAL	4 454 466	1 716 944	2 737 522	159,4%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period January-October 2022 compared to January-October 2021. Six of the top ten African source markets moved remained in the same position namely; for 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 274,5% followed by Zimbabwe (193,6%) and Botswana (147,8%).

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

Country	Rank: October 2022	Tourist Arrivals Jan-Aug 2022	Rank: October 2021	Tourist Arrivals Jan-Aug 2021	% Change from October 2021 to October 2022
Zimbabwe	1	946 498	2	322 410	193,6%
Mozambique	2	752 428	1	414 855	81,4%
Lesotho	3	667 336	3	277 395	140,6%
Eswatini	4	339 772	4	137 108	147,8%
Botswana	5	197 587	5	75 942	160,2%
Namibia	6	107 776	6	71 346	51,1%
Zambia	7	93 322	7	54 159	72,3%
Malawi	8	90 963	8	42 915	112,0%
Angola	9	25 717	12	6 867	274,5%
Tanzania	10	20 656	9	10 274	101,1%

Source: Stats SA Tourism and Migration Report, October 2022

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing January-October 2022 with January-October 2021, all top 10 overseas markets recorded an increase in tourist arrivals with Australia recording the highest increase of 1 429.6%. All of the top ten overseas markets moved positions for the period under review. UK replaced the USA as the main source

market from overseas, recording a growth of 834,0%. China, Pakistan and Russian Federation were replaced by Australia, Belgium and Canada in the top 10 list during January-October 2022 compared to January-October 2021.

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

Country	Rank: October 2022	Tourist Arrivals Jan-Aug 2022	Rank: October 2021	Tourist Arrivals Jan-Aug 2021	% Change from October 2021 to October 2022
UK	1	212 877	3	22 792	834,0%
USA	2	207 420	1	61 291	238,4%
Germany	3	122 738	2	25 683	377,9%
The Netherlands	4	69 115	6	11 999	476,0%
France	5	59 314	4	13 861	327,9%
India	6	44 539	5	13 770	223,4%
Australia	7	37 934	20	2 480	1 429,6%
Belgium	8	27 141	9	5 754	371,7%
Canada	9	26 057	13	4 842	538,1%
Italy	10	25 399	14	4 690	541,6%

Source: Stats SA Tourism and Migration Report, October 2022

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

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

OCTOBER 2022	OCTOBER 2021												
The National State of Disaster has been lifted	Adjusted level 1												
<table><tr><th>ACCOMMODATION</th></tr><tr><td>No restrictions</td></tr><tr><th>FOOD AND BEVERAGES</th></tr><tr><td>No restrictions</td></tr><tr><th>AVIATION</th></tr><tr><td>. No restrictions</td></tr></table>	ACCOMMODATION	No restrictions	FOOD AND BEVERAGES	No restrictions	AVIATION	. No restrictions	<table><tr><th>ACCOMMODATION</th></tr><tr><td>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.</td></tr><tr><th>FOOD AND BEVERAGES</th></tr><tr><td>Restaurants all allowed to operate but subject to the strict adherence to all health protocols</td></tr><tr><th>AVIATION</th></tr><tr><td>Domestic air travel allowed. International travel allowed.</td></tr></table>	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.
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Source: <https://www.gov.za/coronavirus>

2.1 ACCOMMODATION INDUSTRY: OCTOBER 2022

ACCOMMODATION INDUSTRY INCOME: OCTOBER 2022 COMPARED TO OCTOBER 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 October 2022 compared to October 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. In October 2022, the total income (current prices) from the accommodation industry showed an increase of 35,0% compared to October 2021. Total income from most of the different accommodation categories recorded an increase except for Caravans and camping sites which decreased by -15,1% when compared to 2021. Total income from Guest houses and guest farms recorded the highest increase of about 49,9% moving from R100,8 million in October 2021 to R151,1 million in October 2022.

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

Type of Accommodation	OCTOBER 2022				OCTOBER 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	October 2022 compared to October 2021
Hotels (R million)	R546,1	R1 155,3	R1 216,6	R2 918,0	R329,4	R669,2	R1 142,3	R2 140,9	36,3%
Caravan parks and camping sites (R million)	R5,7	R43,2	R11,4	R60,3	R12,3	R52,8	R5,9	R71,0	-15,1%
Guest houses and guest farms (R million)	R18,7	R125,9	R6,5	R151,1	R14,6	R79,0	R7,2	R100,8	49,9%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R112,7	R946,4	R43,0	R1 102,1	R117,1	R673,4	R32,3	R822,8	33,9%
Total Industry - (R million)	R683,2	R2 270,8	R1 277,5	R4 231,5	R473,4	R1 474,4	R1 187,7	R3 135,5	35,0%

Source: Stats SA: October Accommodation data cuts, 12 December 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 54,0% during October 2022. All categories of accommodation showed an increase in income levels except for Caravan parks and camping sites which decreased by -18,2% when compared to 2021. Total income from Hotels recorded the highest

increase of 72,6%; followed by Guest houses and guest farms (59,4%) and other accommodation (40,5%).

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

Type of Accommodation	OCTOBER 2022 Accommodation only	OCTOBER 2021 Accommodation only	% Change October 2022 compared to October 2021
Hotels (R million)	R1 155,3	R669,2	72,6%
Caravan parks and camping sites (R million)	R43,2	R52,8	-18,2%
Guest houses and guest farms (R million)	R125,9	R79,0	59,4%
Other accommodation (R million)	R946,4	R673,4	40,5%
Total Industry – (R million)	R2 270,8	R1 474,4	54,0%

Source: Stats SA: October Accommodation data cuts, 12 December 2022

The monthly percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) for January-October for the period 2021-2022 is provided in table 6 below. Income from accommodation showed an increase of 54,0% during October 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	2 432,8%	31,3%
May	1 735,5%	56,0%
June	671,8%	61,4%
July	274,9%	137,5%
August	126,1%	80,0%
September	72,7%	56,7%
October	52,5%	54,0%

Source: Stats SA: October Accommodation data cuts, 12 December 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: OCTOBER 2022 COMPARED TO OCTOBER 2021

Table 7 below indicates occupancy rates by accommodation type for October 2022 compared to October 2021. The total accommodation occupancy rate in October 2022 was 40,2%, which was an increase compared to 31,5% recorded in October 2021. The occupancy rate for most of the accommodation establishments increased in October 2022 compared to the same month last year except for Caravan parks and camping sites which decreased from 42,4% in 2021 to 37,2% in 2022.

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

Category	OCTOBER	
	2021	2022
Hotel	31,2%	40,7%
Caravan Parks and Camping Sites	42,4%	37,2%
Guest-Houses and Guest Farms	21,8%	25,4%
Other Accommodation	34%	44,4%
Total Accommodation	31,5%	40,2%

Source: Stats SA: October Accommodation data cuts, 12 December 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 October 2022 compared to October 2021 is provided in table 8 below. It is important to note that the STR hotel data information for October 2022 and October 2021 is from a sample of 319 hotels that are drawn from a census/population of 433 hotels.

There was an increase recorded in all hotel performance indicators in October 2022 compared to October 2021. Hotel occupancy rate increased by 28,0% in October 2022 compared to October 2021, moving from an occupancy rate of 50,0% in October 2021 to 64,0% in October 2022. The Average Daily Rate (ADR) for October 2022 was R1 375,8 which was an increase of 25,0% compared to R1 100,8 seen in October 2021. The Revenue Per available room also increased by 59,9%; from R550,6 in October 2021 compared to R880,7 in October 2022.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
October 2022	64,0%	28,0%	R1 375,8	25,0%	R880,7	59,9%	433	319
October 2021	50,0%		R1 100,8		R550,6			

Source: STR Hotel Data October 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: OCTOBER 2022 COMPARED TO OCTOBER 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 October 2022 was about R5 795,3 million, which was an increase of 10,9% compared to R5 228,0 million in October 2021. All food and beverages industry categories showed an increase in income, with catering services having the highest increase

of 35,4% followed by take away and fast food (9,8%) and restaurants and coffee shops with (4,8%).

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

Categories of Food and Beverages	OCTOBER-22	OCTOBER-21	% Change
Catering services (R million)	R966,1	R713,6	35,4%
Take-away and fast food outlets (R million)	R2 166,4	R1 973,3	9,8%
Restaurants and coffee shops (R million)	R2 662,8	R2 541,1	4,8%
Total Industry (R million)	R5 795,3	R5 228,0	10,9%

Source: Stats SA: October Food and beverages data cuts, 12 December 2022

The monthly percentage change of income from the food and beverages industry for October 2022 compared to October 2021 is provided in table 10 below. Income from the food and beverages industry recorded an increase of 10,9% during October 2022 compared to the same month in 2021. Comparing other months, the second last highest increase has been recorded in October 2022 as seen in the table below.

Table 10: Monthly Change in Income from Food and Beverage Industry: October 2022 compared to October 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%	24,3%
September	26,8%	18,9%
October	26,7%	10,9%

Source: Stats SA: October Food and beverages data cuts and report, 12 December 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: OCTOBER 2022 COMPARED TO OCTOBER 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during October 2022 compared to October 2021. Total passenger arrivals increased by 35,3%; from 1 021 041 in October 2021 to 1 381 257 in October 2022. International passengers

showed the highest increase of 119,3% followed by regional (69,5%), unscheduled (20,4%) and domestic passengers (17,2%).

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

Arriving Passengers	OCTOBER-22	OCTOBER-21	% Change
International	374 844	170 961	119,3%
Regional	32 886	19 403	69,5%
Domestic	966 968	825 231	17,2%
Unscheduled	6 559	5 446	20,4%
Total	1 381 257	1 021 041	35,3%

Source: ACSAs data cuts, October 2022

PASSENGER DEPARTURE MOVEMENT: OCTOBER 2022 COMPARED TO OCTOBER 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during October 2022 compared to October 2021. Total departing passengers increased by 34,6% from 1 004 570 in October 2021 to 1 352 364 in October 2022. The table further indicates that international passengers departing had the highest increase of 123,3% followed by regional (64,1%), unscheduled (30,5%) and domestic passengers (17,3%).

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

Departing Passengers	OCTOBER-22	OCTOBER-21	% Change
International	345 063	154 558	123,3%
Regional	32 217	19 634	64,1%
Domestic	968 458	825 301	17,3%
Unscheduled	6 626	5 077	30,5%
Total	1 352 364	1 004 570	34,6%

Source: ACSAs data cuts, October 2022

References:

1. Statistics South Africa 29 November 2022, October Tourism and Migration report.
2. Statistics South Africa, October 2022, Accommodation data cuts.
3. Statistics South Africa, October 2022, Food and Beverage data cuts.
4. Airports Company South Africa, October 2022 data cuts.
5. STR Global RSA Hotel review data October 2022