



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM QUARTERLY PERFORMANCE REPORT

**PERIOD: APRIL-JUNE 2022 COMPARED TO APRIL-
JUNE 2021**

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR JUNE 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 on 27 April 2020, which prevented the movement of people entering and leaving South Africa. 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. As part of this approach, 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 April-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 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 during Jan-June 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 April-June 2022 compared to April-June 2021 is also provided in this report.

TREND ANALYSIS: JUNE 2017 – JUNE 2022

A total of 399 550 tourist arrivals was recorded in June 2022, which was an increase of 123,6% (220 823) compared to the same month in 2021. The increase experienced in June 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 June 2017 to June 2022. Tourist arrivals increased from 708 978 in 2017 to 729 374 in 2018, which was an increase of 2,9% (20 396). Tourist arrivals further increased from 729 374 in 2018 to 734 554 in 2019, which was an increase of 0,7% (5 180). There were zero tourists recorded during June 2020 since the country was under lockdown level 4 which prevented tourists from entering the country.

Figure 1: Total Tourist Arrivals June 2017 to June 2022

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

JUNE 2022 COMPARED TO JUNE 2021 BY REGION

Table 1 below indicates tourist arrivals by region for June 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 1 336,1% (+4 142) followed by Europe (329,8%; +28 626) and North America (213,1%; +20 684). Africa also recorded an increase of 102,2% (+157 182) and this region remains the main source of tourist arrivals to the country, accounting for 77,8% (311 031) of total tourist arrivals during June 2022.

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

Region	June 2022	June 2021	Diff	% Diff.
EUROPE	37 307	8 681	28 626	329,8%
NORTH AMERICA	30 388	9 704	20 684	213,1%
CENTRAL & SOUTH AMERICA	2 070	698	1 372	196,6%
AUSTRALASIA	4 452	310	4 142	1 336,1%
MIDDLE EAST	2 861	1 539	1 322	85,9%
ASIA	10 607	3 616	6 991	193,3%
TOTAL OVERSEAS	87 685	24 548	63 137	257,2%
AFRICA	311 031	153 849	157 182	102,2%
UNSPECIFIED	834	330	504	152,7%
GRAND TOTAL	399 550	178 727	220 823	123,6%

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

JANUARY-JUNE 2022 COMPARED TO JANUARY-JUNE 2021

Tourist arrivals figures by region for the period January-June 2022 compared to the period January-June 2021 are indicated in table 2 below. Total tourist arrivals went up by 146,8% for

the period January-June 2022 compared to the period January-June 2021. This was a growth from a total of 926 262 tourist arrivals recorded during January-June 2021 to 2 285 746 during the period January-June 2022. Total tourist arrivals from the overseas market increased by 429,0% (+459 953). Australasia (1 254,8%) recorded the highest positive growth followed by Europe (563,4%), North America (341,0%), Central and South America (249,5%), Middle East (229,3%), and Asia (164,0%).

In Australasia, Australia recorded the highest increase in volume having an increase of 16 926 (1334,9%) followed by New Zealand (2 601; 919,1%). The United Kingdom had recorded the highest increase in volume (111 689; 1 118,7%) in the Europe region. In North America, the USA has recorded the highest increase in volume (80 215; 321,0%). Israel had recorded the highest increase in volume for the Middle East region with an additional 4 895 tourists compared to January-June 2021. In Central and South America, Brazil recorded the highest increase in volume (237,4%) for the period under review.

Tourist arrivals from Africa increased by 109,8% (+897 124) during the same period under review. In terms of volume, the increase recorded from the continent was driven Zimbabwe (+245 674; 128,9%) followed by Lesotho (+207 504, 133,0%) and Mozambique (+185 250; 80,5%), refer to table 2.1 below.

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

Region	Jan-June 2022 compared to Jan-June 2021				Quarter 2 (April-June): 2022 compared to Quarter 2 (April-June 2021)			
	Jan-June 2022	Jan-June 2021	Diff	% Diff	Quarter 2: 2022	Quarter 2: 2021	Diff	% Diff
EUROPE	356 352	53 715	302 637	563,4%	163 403	29 075	134 328	462,0%
NORTH AMERICA	118 059	26 773	91 286	341,0%	77 803	20 279	57 524	283,7%
CENTRAL & SOUTH AMERICA	10 932	3 128	7 804	249,5%	6 588	1 893	4 695	248,0%
AUSTRALASIA	21 108	1 558	19 550	1 254,8%	13 956	918	13 038	1420,3%
MIDDLE EAST	12 795	3 885	8 910	229,3%	7 819	2 727	5 092	186,7%
ASIA	47 912	18 146	29 766	164,0%	30 002	10 333	19 669	190,4%
TOTAL OVERSEAS	567 158	107 205	459 953	429,0%	299 571	65 225	234 346	359,3%
AFRICA	1 714 501	817 377	897 124	109,8%	936 188	473 092	-463 096	97,9%
UNSPECIFIED	4 087	1 680	2 407	143,3%	2 429	1 008	1 421	141,0%
GRAND TOTAL	2 285 746	926 262	1 359 484	146,8%	1 238 188	539 325	698 863	129,6%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period January-June 2022 compared to January-June 2021. Most of the top ten African source markets moved their positions except for Lesotho, Eswatini and Zambia which ranked 3rd, 4th and 7th position during both periods. Zimbabwe, Botswana and Angola moved up their positions from 2nd to 1st, 6th to 5th and from 14th 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 388,4% followed by Botswana (155,6%) and Lesotho (133,0%).

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

Country	Rank: Jan-June 2022	Tourist Arrivals Jan-June 2022	Rank: Jan-June 2021	Tourist Arrivals Jan-June 2021	% Change from Jan-June 2021 to Jan-June 2022
Zimbabwe	1	436 193	2	190 519	128,9%
Mozambique	2	415 299	1	230 049	80,5%
Lesotho	3	363 564	3	156 060	133,0%
Eswatini	4	161 561	4	74 115	118,0%
Botswana	5	99 070	6	38 766	155,6%
Namibia	6	61 173	5	41 307	48,1%
Zambia	7	51 359	7	29 769	72,5%
Malawi	8	46 025	8	21 591	113,2%
Angola	9	13 437	14	2 751	388,4%
Tanzania	10	11 307	10	5 497	105,7%

Source: Stats SA Tourism and Migration Report, June 2022

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing January-June 2022 with January-June 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 1 118, 7%. China, Pakistan and Russian Federation were replaced by Australia, Belgium and Canada in the top 10 list during January-June 2022 compared to January-June 2021.

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

Country	Rank: Jan-June 2022	Tourist Arrivals Jan-June 2022	Rank: Jan-June 2021	Tourist Arrivals Jan - June 2021	% Change from Jan-June 2021 to Jan-June 2022
UK	1	121 673	2	9 984	1 118,7%
USA	2	105 201	1	24 986	321,0%
Germany	3	68 433	3	9 074	654,2%
The Netherlands	4	31 779	7	4 290	640,8%
France	5	29 504	5	5 553	431,3%
India	6	22 835	4	6 287	263,2%
Australia	7	18 194	19	1 268	1 334,9%
Switzerland	8	13 617	10	2 158	531,0%
Canada	9	12 858	14	1 787	619,5%
Belgium	10	11 896	12	2 034	484,9%

Source: Stats SA Tourism and Migration Report, June 2022

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

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

APRIL-JUNE 2022	APRIL-JUNE 2021																										
The National State of Disaster has been lifted	Adjusted level 1 1 April – 30 May	Adjusted level 2 31 May – 15 June	Adjusted level 3 16 June – 28 June																								
<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.	<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. Interprovincial travel permitted.</td></tr><tr><th>FOOD AND BEVERAGES</th></tr><tr><td>Restaurants and bars needed to close by 10 pm. No onsite consumption of alcohol after 9pm, with a maximum of 250 persons or less for indoor venues and 500 persons or less for outdoor.</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. Interprovincial travel permitted.	FOOD AND BEVERAGES	Restaurants and bars needed to close by 10 pm. No onsite consumption of alcohol after 9pm, with a maximum of 250 persons or less for indoor venues and 500 persons or less for outdoor.	AVIATION	Domestic air travel allowed. International travel allowed.	<table><tr><th>ACCOMMODATION</th></tr><tr><td>All accommodation establishments not permitted to operate, exceptions only for rendering essential services, quarantine and isolations</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 ad must close at 8pm, alcohol prohibited</td></tr><tr><th>AVIATION</th></tr><tr><td>Domestic air travel allowed. International travel allowed.</td></tr></table>	ACCOMMODATION	All accommodation establishments not permitted to operate, exceptions only for rendering essential services, quarantine and isolations	FOOD AND BEVERAGES	Restaurants all allowed to operate but subject to the strict adherence to all health protocols ad must close at 8pm, alcohol prohibited	AVIATION	Domestic air travel allowed. International travel allowed.
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Source: <https://www.gov.za/coronavirus>

2.1 ACCOMMODATION INDUSTRY: JUNE 2022

ACCOMMODATION INDUSTRY INCOME: JUNE 2022 COMPARED TO JUNE 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 June 2022 compared to June 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. In June 2022, the total income (current prices) from the accommodation industry showed an increase of 50,1% compared to June 2021. Total income from most categories recorded an increase except for caravan parks and camping sites which decreased by -2.3%. Total income from guest houses and guest farms recorded the highest increase of about 58,9% moving from R54,2 million in June 2021 to R86,1 million in June 2022.

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

Type of Accommodation	June 2022				June 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	June 2022 compared to June 2021
Hotels (R million)	R425,3	R826,7	R1 076,6	R2 328,6	R190,3	R381,9	R919,8	R1 492,0	56,1%
Caravan parks and camping sites (R million)	R0,5	R24,4	R0,3	R25,2	R0,1	R25,6	R0,1	R25,8	-2,3%
Guest houses and guest farms (R million)	R11,4	R72,6	R2,1	R86,1	R4,4	R48,3	R1,5	R54,2	58,9%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R66,1	R498,8	R55,7	R620,6	R45,5	R395,6	R26,1	R467,2	32,8%
Total Industry - (R million)	R503,3	R1 422,5	R1 134,7	R3 060,5	R240,3	R851,4	R947,5	R2 039,2	50,1%

Source: Stats SA: Accommodation data cuts, 22 August 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 67,1% during June 2022. Most categories of accommodation showed an increase in income levels except caravan parks and camping sites which decreased by -4.7%. Hotels recorded the highest increase of 116,5%; followed by guest houses and guest farms (50,3%) and other accommodation (26,1%). The month-on-month percentage changes of income from the accommodation industry (excluding restaurants, bar sales and other income) for April-June 2022 compared to the same months in 2021 are provided in table 6 below

The quarterly analysis for April-June 2022 compared to April-June 2021 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 56,7% during April-June 2022 compared to the same period in 2021. Most categories of

accommodation recorded an increase in income levels except caravan parks and camping sites which decreased by -12.9%. The highest increase was from the hotel industry with an increase of about 90,9%; followed by guest houses and guest farms (51,0%) and other accommodation (26,7%).

Table 5: Income from Accommodation only (Excluding restaurants, bar sales and other income): June 2022 compared to June 2021 and April to June 2022 compared to April to June 2021 (Current Prices)

Type of Accommodation	June 2022	June 2021	% Change June 2022 compared to June 2021	April-June 2022	April-June 2021	% Change April-June 2022 compared to April-June 2021
Hotels (R million)	R826,7	R381,9	116,5%	R2 531,0	R1 325,8	90,9%
Caravan parks and camping sites (R million)	R24,4	R25,6	-4,7%	R73,2	R84,0	-12,9%
Guest houses and guest farms (R million)	R72,6	R48,3	50,3%	R229,8	R152,2	51,0%
Other accommodation (R million)	R498,8	R395,6	26,1%	R1 628,0	R1 285,0	26,7%
Total Industry – (R million)	R1 422,5	R851,4	67,1%	R4 462,0	R2 847,0	56,7%

Source: Stats SA: Accommodation data cuts, 22 August 2022

Table 6: Year- on-Year Change in income from Accommodation

MONTH	2019	2020	2021	2022
April	3,6%	-98,0%	2291,1%	42,5%
May	2,6%	-97,5%	1724,6%	63,8%
April	7,0%	-94,5%	653,5%	67,1%

Source: Stats SA: Accommodation data cuts, 22 August 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: APRIL-JUNE 2022 COMPARED TO APRIL-JUNE 2021

Table 7 below indicates occupancy rates by accommodation type for April-June 2022 compared April-June 2021. The total accommodation occupancy rate in June 2022 was 31,1%, which was an increase compared to 21,8% recorded in June 2021. The occupancy rate of most accommodation establishments increased in June 2022 compared to the same month last year, except for caravan parks and camping sites with a decline from 35,8% during June 2021

to 27,6% during the same month in 2022. Most categories of accommodation occupancy rates also increased in April and May 2022 except for caravan parks and camping sites.

Table 7: Occupancy Rate: April to June 2022 compared to April to June 2021

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Apr-21	24,6	31,1	15,4	32,4	26,6
Apr-22	33,8	27,7	16,3	33,5	31,5
May-21	22,5	35,9	14,5	25,9	23,8
May-22	34,5	28,5	17,7	30,4	31,2
Jun-21	19,4	35,8	14,6	24,5	21,8
Jun-22	34,1	27,6	17,6	31,2	31,1

Source: Stats SA: Accommodation data cuts, 22 August 2022

In addition to Stats SA's monthly accommodation report, the Department also subscribes to STR Global, which collects information from hotels every month. The performance of the South African hotel industry for June 2022 compared to June 2021 is provided in table 8 below. It is important to note that the STR hotel data information for June 2022 and June 2021 is from a sample of 324 hotels that were drawn from a census/population of 428 hotels. There was an increase recorded in all hotel performance indicators in June 2022 compared to June 2021. Hotel occupancy rate increased by 67,5% in June 2022 compared to June 2021, moving from an occupancy rate of 29,1% in June 2021 to 48,7% in June 2022. The Average Daily Rate (ADR) for June 2022 was R1 152,9 which was an increase of 12,6% compared to R1 023,9 recorded in June 2021. The Revenue Per available room also increased by 88,6%; moving from R297,5 in June 2021 compared to R561,2 in June 2022.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
22-June	48,7	67,5	R1 152,9	12,6	R561,2	88,6	428	324
21-June	29,1		R1 023,9		R297,5			

Source: STR Hotel Data June 2022

The performance of the South African hotel industry for April, May and June 2022 compared to the same months of the previous year (2021) is provided in table 8.1 below. The sample size and population for each month are also provided in the table. Comparing the occupancy rates for the months of April, May and June 2022 to the same months in 2021 there has been an increase in occupancy rates, with June 2022 having the highest percentage change of

67,5% compared to June 2021. The Average Daily Rate (ADR) for April, May and June 2022 also increased compared to the same months in the previous year. The Revenue Per available room during April, May and June 2022 also increased compared to the same months in 2021 with June 2022 having the highest increase (88,6%) compared to June 2021.

Table 8.1: South Africa Hotel Performance: April-June 2022 compared to April-June 2021

Indicators	Size		Occ %		ADR		RevPAR		Percent Change		
	Census	Sample	2022	2021	2022	2021	2022	2021	Occ	ADR	RevPAR
April	427	319	49,0	39,0	R1 264,6	R1 078,1	R611,4	R420,1	25,8%	15,6%	45,5%
May	429	320	50,6	34,6	R1 231,3	R1 009,0	R622,7	R349,2	46,1%	22,0%	78,3%
June	428	324	48,7	29,1	R1 152,9	R1 023,9	R561,2	R297,5	67,5%	12,6%	88,6%

Source: STR Hotel Data April, May and June 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JUNE 2022 COMPARED TO JUNE 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 June 2022 was about R4 893,2 million, which was an increase of 20,8% compared to R4 051,4 million in June 2021. All food and beverages industry categories showed an increase in income, with catering services having the highest increase of 40,8% followed by and restaurants and coffee shops (18,6%) and take away and fast food with 15,8%.

The total income of the food and beverages industry for the period April-June 2022 compared to the same period of the previous year is also shown in the figure below. The total income of the food and beverages industry was about R14 992,6 million in April-June 2022, recording an increase of 13,3% when compared to income of about R13 231,1 million during the same period in 2021. All categories of the food and beverages industry experienced an increase, with the highest positive growth seen in catering services (26,4%), followed by take-away and fast food outlets (12,4%) and restaurants and coffee shops (10,2%).

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: June 2022 compared to June 2021 and April to June 2022 compared to April to June 2021

Categories of Food and Beverages	Jun-22	Jun-21	% Change	April-June 2022	April-June 2021	% Change
Catering services (R million)	R831,4	R590,5	40,8%	R2 418,6	R1 913,6	26,4%

Categories of Food and Beverages	Jun-22	Jun-21	% Change	April-June 2022	April-June 2021	% Change
Take-away and fast food outlets (R million)	R1 728,7	R1 493,2	15,8%	R5 281,4	R4 700,2	12,4%
Restaurants and coffee shops (R million)	R2 333,1	R1 967,7	18,6%	R7 292,6	R6 617,3	10,2%
Total Industry (R million)	R4 893,2	R4 051,4	20,8%	R14 992,6	R13 231,1	13,3%

Source: Stats SA: Food and beverages data cuts, 22 August 2022

The monthly percentage change of income from the food and beverages industry for June 2022 compared to June 2021 is provided in table 10 below. Income from the food and beverages industry recorded an increase of 20,8% during June 2022 compared to the same month in 2021. There was also an increase recorded in April and May compared to the same months of the previous year.

Table 10: Monthly change in Income from food and beverage industry: June 2022 compared to June 2021 at constant 2019 prices (R million)

MONTH	2021	2022
April	1 292,5%	13,1%
May	526,5%	7,1%
June	99,9%	20,8%

Source: Stats SA: April Food and beverages data cuts and report, 22 August 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: JUNE 2022 COMPARED TO JUNE 2021 and APRIL TO JUNE 2022 COMPARED TO APRIL TO JUNE 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during June 2022 compared to June 2021. Total passenger arrivals increased by 68,6%; from 632 473 in June 2021 to 1 066 360 in June 2022. International passengers showed the highest increase of 209,4% followed by regional (177,3%), unscheduled passengers (79,3%) and domestic (45,0%).

The table below also shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during April-June 2022 compared to April-June 2021. Total passenger arrivals increased by 55,0%, moving from 2 300 721 in April-June 2021 to 3 565 057 during the same months in 2022.

International passengers had the highest increase of 246,8% in April-June 2022 compared to April-June 2021. Regional passengers arriving during April-June 2022 increased by 157,4% compared to the same period in 2021. The number of domestic passengers also increased by 30,9%, from 2 023 013 in April-June 2021 to 2 648 574 in April-June 2022. Passengers arriving on unscheduled flights also recorded an increase of 82,3%.

Table 11: Arriving Passengers: June 2022 compared to June 2021 and April to June 2022 compared to April to June 2021

Arriving Passengers	Jun-22	Jun-21	% Change	April-June 2022	April-June 2021	% Change
International	254 175	82 141	209,4%	812 838	234 416	246,8%
Regional	27 513	9 920	177,3%	84 778	32 941	157,4%
Domestic	778 605	537 028	45,0%	2 648 574	2 023 013	30,9%
Unscheduled	6 067	3 384	79,3%	18 867	10 351	82,3%
Total	1 066 360	632 473	68,6%	3 565 057	2 300 721	55,0%

Source: ACSAs data cuts, June 2022

PASSENGER DEPARTURE MOVEMENT: JUNE 2022 COMPARED TO JUNE 2021 AND APRIL TO JUNE 2022 COMPARED TO APRIL TO JUNE 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during June 2022 compared to June 2021. Total departing passengers increased by 73,4%; from 643 585 in June 2021 to 1 116 106 in June 2022. The table further indicates that international passengers departing had the highest increase of 234,2% followed by regional (157,6%), unscheduled passengers (87,0%) and domestic (44,7%).

The table below shows the total number of passengers departing from ACSA airports during the period April-June 2022 compared to April-June 2021. Total passengers departing from the country increased by 58,1% in April-June 2022 compared to the same period in 2021. All categories of passengers departing from different ACSA airports showed an increase and the highest growth was recorded for International passengers departing, which was an increase of 267,4% from 248 721 in April-June 2021 to 913 721 that was recorded during April-June 2022.

Table 12: Departing Passengers: June 2022 compared to June 2021 and April-June 2022 compared to January to April 2021

Departing Passengers	Jun-22	Jun-21	% Change	Apr-June 2022	Apr-June 2021	% Change
International	301 552	90 243	234,2%	913 721	248 721	267,4%
Regional	28 766	11 165	157,6%	86 208	35 621	142,0%
Domestic	779 508	538 819	44,7%	2 649 137	2 026 123	30,7%
Unscheduled	6 280	3 358	87,0%	19 571	10 454	87,2%
Total	1 116 106	643 585	73,4%	3 668 637	2 320 919	58,1%

Source: ACSAs data cuts, June 2022

2.4 TOURISM-RELATED INDUSTRY EMPLOYMENT APRIL-JUNE 2022 COMPARED TO APRIL-JUNE 2021

EMPLOYMENT OF TOURISM-RELATED INDUSTRIES APRIL-JUNE 2022 COMPARED TO APRIL-JUNE 2021

NOTE: Previous quarterly performance reports provided estimates on the number of direct jobs created by the tourism sector in South Africa by applying ratios to the different tourism-related industries. The ratios are sourced from the latest Tourism Satellite Account however, due to the uncertainty related to covid-19, tourism ratios will not be applied therefore this section reports on the total number of jobs created by the tourism-related industries.

The information presented in this section uses Stats SA's Quarterly Labour Force Survey (QLFS) to provide employment estimates for tourism-related industries which are identified in the Tourism Satellite Account. It is important to note that the QLFS is designed to provide estimates at the 1-digit level of the Standard Industrial Classification, therefore estimates below this level should be used with caution considering that the sample is not designed to provide estimates at levels lower than the 1-digit level.

Table 13 indicates that an estimated 17,6% of South African jobs were created by tourism-related industries during April-June 2022, and that was an increase of 2,8% (75 511) in total jobs created by the tourism related-industries when compared to April-June 2021. Total employment increased by 4,2% during April-June 2022 compared to April-June 2021.

Table 13: Tourism-related industries employment: April-June 2022 compared to April-June 2021

Employment	APRIL-JUNE 2022	APRIL-JUNE 2021	Difference	% Growth
Total Tourism Related Industries Employment	2 736 601	2 661 090	75 511	2,8%
Total Employment	15 561 858	14 941 573	620 285	4,2%
Share of tourism related-industries to total employment	17,6%	17,8%		

Source: Stats SA, Q2 2022 Labour Force Survey data cuts

Table 14 provides the share of the total jobs created by the different tourism-related industries for the period April-June 2022 compared to April-June 2021. When tourism ratios are not applied, almost half of tourism-related jobs are created by the retail industry (46,6%) followed by the road passenger transport industry (23,6%) and food and beverages (12,3%) during April-June 2022.

Table 14: Tourism-related industries share of employment: April-June 2022 compared to April-June 2021

Tourism-Related Industries	APRIL-JUNE 2022	APRIL-JUNE 2021
Retail trade	46,6%	49,5%
Road Passenger transport	23,6%	25,5%
Food and Beverages	12,3%	12,0%
Accommodation for tourists	6,1%	4,3%
Cultural Services	4,4%	3,0%
Sporting and other recreation services	2,7%	2,4%
Railway passenger transport	2,2%	1,9%
Other (Water passenger transport services, Air Passenger Transport, Transport Equipment Rental and Travel agencies)	2,1%	1,4%
Total Tourism Related Industries Employment	100%	100%

Source: Stats SA, Q2 2022 Labour Force Survey data cuts

References:

1. Statistics South Africa 24 August 2022, Tourism and Migration report.
2. Statistics South Africa, June 2022, Accommodation data cuts.
3. Statistics South Africa, June 2022, Food and Beverage data cuts.
4. Airports Company South Africa, June 2022 data cuts.
5. STR Global RSA Hotel review data June 2022
6. Statistics South Africa, June 2022, Quarterly Labour force Survey data