tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM QUARTERLY PERFORMANCE REPORT

PERIOD: JULY-SEPTEMBER 2022 COMPARED TO JULY-SEPTEMBER 2021

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

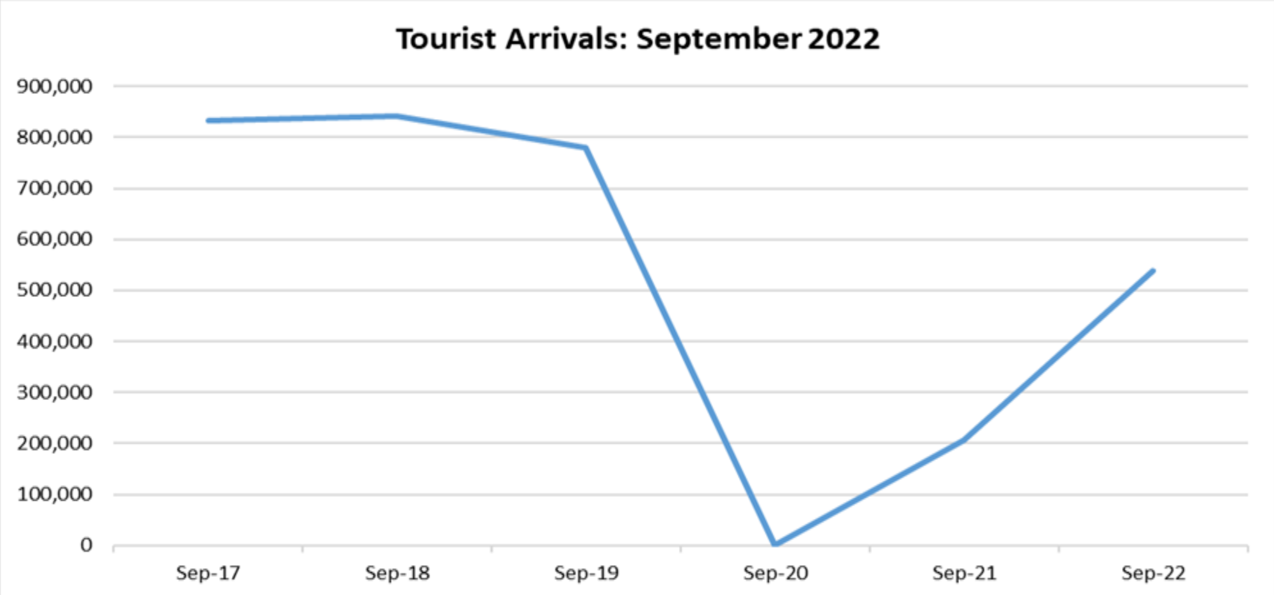
NOTE: To limit the spread of COVID-19 and prepare the health care sector, the South African government announced a national lockdown for the country starting on 27 July 2020, which prevented the movement of people entering and leaving South Africa. The South African government adopted the risk adjustment 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 July-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 5th of June 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 January-September 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-September 2022 compared to July-September 2021 is also provided in this report.

TREND ANALYSIS: SEPTEMBER 2017 – SEPTEMBER 2022

A total of 539 202 tourist arrivals was recorded in September 2022, which was an increase of 161,8% (333 254) compared to the same month in 2021. The increase experienced in September 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 September 2017 to September 2022. Tourist arrivals increased from 833 078 in 2017 to 842 361 in 2018, which was a growth of 1,1% (9 283). However, tourist arrivals decreased from 842 361 in 2018 to 780 381 in 2019, which was a decrease of -7,4% (61 980). There were zero tourists recorded during September 2020 since the country was under lockdown level 4 which prevented tourists from entering the country.

Figure 1: Total Tourist Arrivals September 2017 to September 2022



Tourist Arrivals: September	Sep-17	Sep-18	Sep-19	Sep-20	Sep-21	Sep-22
	833,078	842,361	780,381	0	205,948	539,202
Diff.	39,468	9,283	(61,980)	(780,381)	205,948	333,254
% Diff	5.0%	1.1%	-7.4%	-100.0%	1/*	161.8%

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

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

SEPTEMBER 2022 COMPARED TO SEPTEMBER 2021 BY REGION

Table 1 below indicates tourist arrivals by region for September 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 1 763,9% (+6 897) followed by Europe (315,0%; +53 797) and North America (188,1%; +19 163). Africa also recorded an increase of 141,3% (+241 094) and this region remains the main source of tourist arrivals to the country, accounting for 76,4% (411 724) of total tourist arrivals during September 2022.

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

Region	September 2022	September 2021	Diff	% Diff.
EUROPE	70 874	17 077	53 797	315.0%
NORTH AMERICA	29 353	10 190	19 163	188.1%
CENTRAL & SOUTH AMERICA	2 990	1 049	1 941	185.0%
AUSTRALASIA	7 288	391	6 897	1 763.9%
MIDDLE EAST	4 598	1 613	2 985	185.1%
ASIA	11 306	4 575	6 731	147.1%
TOTAL OVERSEAS	126 409	34 895	91 514	262.3%
AFRICA	411 724	170 630	241 094	141.3%
UNSPECIFIED	1 069	423	646	152.7%
GRAND TOTAL	539 202	205 948	333 254	161.8%

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

JANUARY-SEPTEMBER 2022 COMPARED TO JANUARY-SEPTEMBER 2021

Tourist arrivals figures by region for the period January-September 2022 compared to the period January-September 2021 are indicated in table 2 below. Total tourist arrivals went up by 164,7% for the period January-September 2022 compared to the period January-September 2021. This was a growth from a total of 1 469 111 tourist arrivals recorded during January-September 2021 to 3 888 604 during the period January-September 2022. Total tourist arrivals from the overseas market increased by 391,4% (+755 910). Australasia (1 490,6%) recorded the highest positive growth followed by Europe (518,5%), Middle East (288,3%), North America (273,7%), Central and South America (243,8%) and Asia (176,8%).

In Australasia, Australia recorded the highest increase in volume having an increase of 30 736 (1 539,9%) followed by New Zealand (+5 854; 1 281,0%). The United Kingdom had recorded the highest increase in volume (+169 856; 1 055,5%) in the Europe region. In North America, the USA has recorded the highest increase in volume (+132 700; 257,0%). Israel had recorded the highest increase in volume for the Middle East region with an additional 10 711 tourists compared to January-September 2021. In Central and South America, Brazil recorded the highest increase in volume (+7 159; 244,9%) for the period under review. In Asia, India recorded the highest increase in volume (+27 160, 241,2%) compared to January-September 2021.

Tourist arrivals from Africa increased by 130,3% (+1 659 522) during the same period under review. In terms of volume, the increase recorded from the continent was driven by Zimbabwe (+533 707; 189,3%) followed by Lesotho (+350 449; 143,9%) and Mozambique (+304 697; 83,8%), refer to table 2.1 below.

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

Region	Jan-September 2022 compared to 2021				Quarter 3 (July-September) 2022 compared to 2021			
	Jan-September 2022	Jan-September 2021	Diff	% Diff	Quarter 3: 2022	Quarter 3: 2021	Diff	% Diff
EUROPE	571 536	92 406	479 130	518.5%	215,184	38,691	176,493	456.2%
NORTH AMERICA	206 555	55 267	151 288	273.7%	88,496	28,494	60,002	210.6%
CENTRAL & SOUTH AMERICA	19 492	5 670	13 822	243.8%	8,560	2,542	6,018	236.7%
AUSTRALASIA	39 193	2 464	36 729	1 490.6%	18,085	906	17,179	1896.1%
MIDDLE EAST	31 130	8 017	23 113	288.3%	18,335	4,132	14,203	343.7%
ASIA	81 138	29 310	51 828	176.8%	33,226	11,164	22,062	197.6%
TOTAL OVERSEAS	949 044	193 134	755 910	391.4%	381,886	85,929	295,957	344.4%
AFRICA	2 932 778	1 273 256	1 659 522	130.3%	1,218,277	455,879	762,398	167.2%
UNSPECIFIED	6 782	2 721	4 061	149.2%	2,695	1,041	1,654	158.9%
GRAND TOTAL	3 888 604	1 469 111	2 419 493	164.7%	1,602,858	542,849	1,060,009	195.3%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period January-September 2022 compared to January-September 2021. Zimbabwe moved up their position from 2nd to 1st and Tanzania moved down their position from 9th to 10th 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 320,6%

followed by Zimbabwe (189,3%) and Botswana (167,9%). Lesotho, Eswatini, Botswana, Namibia and Zambia did not move positions, ranking 4th,5th, 6th, 7th and 8th respectively in 2021 and 2022.

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

Country	Rank: Jan-September 2022	Tourist Arrivals Jan-September 2022	Rank: Jan-September 2021	Tourist Arrivals Jan-September 2021	% Change from Jan-September 2021 to Jan-September 2022
Zimbabwe	1	815 616	2	281 909	189.3%
Mozambique	2	668 356	1	363 659	83.8%
Lesotho	3	593 979	3	243 530	143.9%
Eswatini	4	295 642	4	119 157	148.1%
Botswana	5	172 753	5	64 495	167.9%
Namibia	6	95 763	6	62 240	53.9%
Zambia	7	82 608	7	46 850	76.3%
Malawi	8	77 043	8	36 586	110.6%
Angola	9	22 715	12	5 400	320.6%
Tanzania	10	18 100	9	8 777	106.2%

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

Table 2.2 shows the rankings of the top ten Overseas source markets. Comparing January-September 2022 with January-September 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 1 055,5%. China, Pakistan, Russian Federation and Switzerland were replaced by Australia, Belgium, Canada and Italy in the top 10 list during January-September 2022 compared to January-September 2021.

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

Country	Rank: Jan-September 2022	Tourist Arrivals Jan-September 2022	Rank: Jan-September 2021	Tourist Arrivals Jan -September 2021	% Change from Jan-September 2021 to Jan-September 2022
UK	1	185 949	2	16 093	1 055.5%
USA	2	184 330	1	51 630	257.0%
Germany	3	99 986	3	15 900	528.8%
The Netherlands	4	59 314	6	8 320	612.9%
France	5	49 879	5	9 915	403.1%
India	6	38 419	4	11 259	241.2%
Australia	7	32 732	19	1 996	1 539.9%
Belgium	8	22 687	12	3 835	491.6%
Italy	9	22 476	13	3 748	499.7%
Canada	10	22 225	14	3 637	511.1%

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

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

The next section of the report is about the performance of tourism-related industries during July-September 2022 compared to July-September 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 05 June 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-September 2022 and July-September 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-September 2022 and July-September 2021

	July-September 2022 National State of Disaster lifted	01 -31 July 2021 Adjusted Alert Level 3 & 4	01-30 August 2021 Adjusted Alert Level 3	01-31 September 2021 Adjusted Alert Level 3 & 2
ACCOMMODATION	No restrictions/regulations.	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.	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.	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	No restrictions/regulations.	Restaurants and bars need to close by 9 pm. No onsite consumption of alcohol after 9pm with a maximum of 50 persons or less for indoor venues and 100 persons or less for outdoor.	Restaurants and bars need to close by 9 pm. No onsite consumption of alcohol after 9pm with a maximum of 50 persons or less for indoor venues and 100 persons or less for outdoor.	Restaurants and bars need 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	No restrictions/regulations.	Domestic air travel allowed. International travel allowed.	Domestic air travel allowed. International travel allowed.	Domestic air travel allowed. International travel allowed.

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

2.1 ACCOMMODATION INDUSTRY: SEPTEMBER 2022

ACCOMMODATION INDUSTRY INCOME: SEPTEMBER 2022 COMPARED TO SEPTEMBER 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 September 2022 compared to September 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. In September 2022, the total income (current prices) from the accommodation industry showed an increase of 79,3% compared to September 2021. Total income from most categories recorded an increase except for caravan parks and camping sites which decreased by -18.5%. Total income from hotels recorded the highest increase of about 118,6% moving from R1 228,3 million in September 2021 to R2 685,2 million in September 2022.

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

Type of Accommodation	September 2022				September 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	September 2022 compared to September 2021
Hotels (R million)	R500,3	R1 038,8	R1 146,1	R2 685,2	R268,0	R544,1	R416,2	R1 228,3	118,6%
Caravan parks and camping sites (R million)	R11,9	R36,1	R4,6	R52,6	R12,3	R46,0	R5,9	R64,2	-18,1%
Guest houses and guest farms (R million)	R15,7	R139,8	R8,0	R163,5	R10,9	R81,3	R5,6	R97,8	67,2%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R102,8	R828,6	R42,2	R973,6	R104,8	R636,8	R29,4	R771,0	26,3%
Total Industry - (R million)	R630,7	R2 043,3	R1 200,9	R3 874,9	R396,0	R1 308,2	R457,1	R2 161,3	79,3%

Source: Stats SA: Accommodation data cuts, 21 November 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 56,2% during September 2022. Most categories of accommodation showed an increase in income levels except for caravan parks and camping sites which decreased by -21.5%. Hotels recorded the highest increase of 90,9%; followed by guest houses and guest farms (72,0%) and other accommodation (30,1%). The month-on-month percentage changes of income from the accommodation industry (excluding restaurants, bar sales and other income) for July-September 2022 compared to the same months in 2021 are provided in table 6 below

The quarterly analysis for July-September 2022 compared to July-September 2021 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 83,9% during July-September 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 -17.6%. The highest increase was from the hotel industry with an increase of about 134,8%; followed by guest houses and guest farms (105,0%) and other accommodation (52,4%).

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

Type of Accommodation	September 2022	September 2021	% Change September 2022 compared to September 2021	July-September 2022	July-September 2021	% Change July-September 2022 compared to July-September 2021
Hotels (R million)	R1 038,8	R544,1	90,9%	R2 827,8	R1 204,4	134,8%
Caravan parks and camping sites (R million)	R36,1	R46,0	-21,5%	R114,8	R139,4	-17,6%
Guest houses and guest farms (R million)	R139,8	R81,3	72,0%	R351,9	R171,7	105,0%
Other accommodation (R million)	R828,6	R636,8	30,1%	R2 455,9	R1 611,0	52,4%
Total Industry – (R million)	R2 043,3	R1 308,2	56,2%	R5 750,4	R3 126,5	83,9%

Source: Stats SA: Accommodation data cuts, 21 November 2022

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

MONTH	2019	2020	2021	2022
July	3,9%	-92,0%	274,9%	137,5%
August	5,8%	-82,3%	126,1%	80,0%
September	8,7%	-73,0%	72,7%	56,2%

Source: Stats SA: Accommodation data cuts, 21 November 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JULY-SEPTEMBER 2022 COMPARED TO JULY-SEPTEMBER 2021

Table 7 below indicates occupancy rates by accommodation type for July-September 2022 compared July-September 2021. The total accommodation occupancy rate in September 2022 was 38,2%, which was an increase compared to 28,4% recorded in September 2021. The occupancy rate of most accommodation establishments increased in September 2022 compared to the same month last year, except for caravan parks and camping sites with a decline from 43,2% during September 2021 to 37,3% during the same month in 2022. Most categories of accommodation occupancy rates also increased in July and August 2022 except for caravan parks and camping sites.

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

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jul-21	12,8	43,7	9,3	21,6	16,4
Jul-22	34,7	40,2	22,2	38,2	34,7
Aug-21	20,3	39,6	17,3	27,1	22,9
Aug-22	35,4	36,3	21,6	38,9	35,1
Sep-21	26,3	43,2	21,7	32,3	28,4
Sep-22	38,9	37,3	25,0	41,5	38,2

Source: Stats SA: Accommodation data cuts, 21 November 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 September 2022 compared to September 2021 is provided in table 8 below. It is important to note that the STR hotel data information for September 2022 and September 2021 is from a sample of 324 hotels that were drawn from a census/population of 432 hotels. There was an increase recorded in all hotel performance indicators in September 2022 compared to September 2021. Hotel occupancy rate increased by 45,9% in September 2022 compared to September 2021, moving from an occupancy rate of 41,3% in September 2021 to 60,3% in September 2022. The Average Daily Rate (ADR) for September 2022 was R1 291,7 which was an increase of 21,6% compared to R1 062,6 recorded in September 2021. The Revenue Per available room also increased by 77,3%; moving from R439,3 in September 2021 compared to R779,1 in September 2022.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
22-September	60.3%	45.9%	R1,291.7	21.6%	R779.1	77.3%	432	324
21-September	41.3%		R1,062.6		R439.3			

Source: STR Hotel Data September 2022

The performance of the South African hotel industry for July, August and September 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 July, August and September 2022 to the same months in 2021 there has been an increase in occupancy rates, with September 2022 having the highest percentage change of 60,3% compared to September 2021. The Average Daily Rate (ADR) for July, August and September 2022 also increased compared to the same months in the previous year. The Revenue Per available room during July, August and September 2022 also increased compared to the same months in 2021 with July 2022 having the highest increase (262,2%) compared to July 2021.

Table 8.1: South Africa Hotel Performance: July-September 2022 compared to July-September 2021

Indicators	Size		Occ %		ADR		RevPAR		Percent Change		
Months	**Census**	**Sample**	**2022**	**2021**	**2022**	**2021**	**2022**	**2021**	**Occ**	**ADR**	**RevPAR**
July	426	324	53.3	17.9	1,196.42	986.23	638.07	176.17	198.6%	21.3%	262.2%
August	429	322	53.0	31.8	R1,219.8	R1,025.5	R646.2	R325.8	66.7%	18.9%	98.3%
September	432	324	60.3	41.3	1,291.69	1,062.55	779.11	439.34	45.9%	21.6%	77.3%

Source: STR Hotel Data July, August and September 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: SEPTEMBER 2022 COMPARED TO SEPTEMBER 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 September 2022 was about R5 571,0 million, which was an increase of 18,6% compared to R4 699,0 million in September 2021. All food and beverages industry categories showed an increase in income, with catering services having the highest increase of 35,5% followed by and restaurants and coffee shops (18,6%) and take away and fast food with 12,4%.

The total income of the food and beverages industry for the period July-September 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 R16 869,0 million in July-September 2022, recording an increase of 31,2% when compared to income of about R12 854,1 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 (42,0%), followed by restaurants and coffee shops (39,1%) and take-away and fast food outlets (18,9%).

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: September 2022 compared to September 2021 and July to September 2022 compared to July to September 2021

Categories of Food and Beverages	Sept-22	Sept-21	% Change	July-September 2022	July-September 2021	% Change
Catering services (R million)	R887,5	R655,1	35,5%	R2 563,0	R1 805,0	42,0%
Take-away and fast food outlets (R million)	R2 032,3	R1 808,7	12,4%	R6 236,2	R5 246,8	18,9%

Categories of Food and Beverages	Sept-22	Sept-21	% Change	July-September 2022	July-September 2021	% Change
Restaurants and coffee shops (R million)	R2 651,2	R2 235,2	18,6%	R8 069,8	R5 802,3	39,1%
Total Industry (R million)	R5 571,0	R4 699,0	18,6%	R16 869,0	R12 854,1	31,2%

Source: Stats SA: Food and beverages data cuts, 21 November 2022

The monthly percentage change of income from the food and beverages industry for September 2022 compared to September 2021 is provided in table 10 below. Compared to September 2022, income from the food and beverages industry recorded a lower percentage growth of 18,6% during September 2022 compared to the same month in 2021. There was also a lower percentage growth recorded in August compared to the same months of the previous year.

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

MONTH	2021	2022
July	36,7%	55,8%
August	43,4%	24,3%
September	26,8%	18,6%

Source: Stats SA: Food and beverages data cuts, 21 November 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: SEPTEMBER 2022 COMPARED TO SEPTEMBER 2021 and JULY TO SEPTEMBER 2022 COMPARED TO JULY TO SEPTEMBER 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during September 2022 compared to September 2021. Total passenger arrivals increased by 51,6%; from 837 533 in September 2021 to 1 269 416 in September 2022. International passengers showed the highest increase of 183,9% followed by regional (120,5%), unscheduled passengers (32,9%) and domestic (28,4%).

The table below also shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during July-September 2022 compared to July-September 2021. Total passenger arrivals increased by 111,2%, moving from 1 784 261 in July-September 2021 to 3 767 625 during the same months in 2022.

International passengers had the highest increase of 249,6 % in July-September 2022 compared to July-September 2021. Regional passengers arriving during July-September 2022 increased by 165,0% compared to the same period in 2021. The number of domestic passengers also increased by 82,2%, from 1 445 885 in July-September 2021 to 2 634 963 in July-September 2022. Passengers arriving on unscheduled flights also recorded an increase of 78,1%.

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

Arriving Passengers	Sept-22	Sept-21	% Change	July-September 2022	July-September 2021	% Change
International	328 574	115 721	183.9%	1 013 044	289 743	249.6%
Regional	33 459	15 175	120.5%	100 617	37 965	165.0%
Domestic	901 729	702 382	28.4%	2 634 963	1 445 885	82.2%
Unscheduled	5 654	4 255	32.9%	19 001	10 668	78.1%
Total	1 269 416	837 533	51.6%	3 767 625	1 784 261	111.2%

Source: ACSAs data cuts, September 2022

PASSENGER DEPARTURE MOVEMENT: SEPTEMBER 2022 COMPARED TO SEPTEMBER 2021 AND JULY TO SEPTEMBER 2022 COMPARED TO JULY TO SEPTEMBER 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during September 2022 compared to September 2021. Total departing passengers increased by 51,8%; from 841 920 in September 2021 to 1 278 437 in September 2022. The table further indicates that international passengers departing had the highest increase of 188,6% followed by regional (105,2%), domestic (27,9%) and unscheduled passengers (16,7%).

The table below shows the total number of passengers departing from ACSA airports during the period July-September 2022 compared to July-September 2021. Total passengers departing from the country increased by 107,4% in July-September 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 225,5% from 307 791 in July-September 2021 to 1 001 994 that was recorded during July-September 2022.

Table 12: Departing Passengers: September 2022 compared to September 2021 and July-September 2022 compared to July-September 2021

Departing Passengers	Sept-22	Sept-21	% Change	July-September 2022	July-September 2021	% Change
International	341 297	118 273	188.6%	1 001 994	307 791	225.5%
Regional	31 234	15 221	105.2%	95 095	37 278	155.1%
Domestic	901 012	704 234	27.9%	2 631 272	1 450 296	81.4%
Unscheduled	4 894	4 192	16.7%	16 946	10 475	61.8%
Total	1 278 437	841 920	51.8%	3 745 307	1 805 840	107.4%

Source: ACSAs data cuts, September 2022

2.4 TOURISM-RELATED INDUSTRY EMPLOYMENT JULY-SEPTEMBER 2022 COMPARED TO JULY-SEPTEMBER 2021

EMPLOYMENT OF TOURISM-RELATED INDUSTRIES JULY-SEPTEMBER 2022 COMPARED TO JULY-SEPTEMBER 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 17,7% of South African jobs were created by tourism-related industries during July-September 2022 and that was an increase of 13,9% (341 185) in total jobs created by the tourism related-industries when compared to July-September 2021. Total employment increased by 10,4% during July-September 2022 compared to July-September 2021.

Table 13: Tourism-related industries employment: July-September 2022 compared to July-September 2021

Employment	JULY-SEPTEMBER 2022	JULY-SEPTEMBER 2021	Difference	% Growth
Total Tourism Related Industries Employment	2 789 194	2 448 009	341 185	13.9%
Total Employment	15 765 404	14 282 007	1 483 396	10.4%
Share of tourism related-industries to total employment	17.7%	17.1%		

Source: Stats SA, Q3 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 July-September 2022 compared to July-September 2021. When tourism ratios are not applied, almost half of tourism-related jobs are created by the retail industry (47,3%) followed by the road passenger transport industry (22,8%) and food and beverages (13,7%) during July-September 2022.

Table 14: Tourism-related industries share of employment: July-September 2022 compared to July-September 2021

Tourism-Related Industries	JULY-SEPTEMBER 2022	JULY-SEPTEMBER 2021
Retail trade	47.3%	47.5%
Road Passenger transport	22.8%	26.3%
Food and Beverages	13.7%	11.9%
Accommodation for tourists	4.4%	4.3%
Cultural Services	4.2%	3.5%
Sporting and other recreation services	2.8%	2.4%
Railway passenger transport	2.4%	2.5%
Other (Water passenger transport services, Air Passenger Transport, Transport Equipment Rental and Travel agencies)	2.5%	1.6%
Total Tourism Related Industries Employment	100%	100%

Source: Stats SA, Q3 2022 Labour Force Survey data cuts

References:

1. Statistics South Africa 15 November 2022, September Tourism and Migration report.
2. Statistics South Africa, September 2022, Accommodation data cuts.
3. Statistics South Africa, September 2022, Food and Beverage data cuts.
4. Airports Company South Africa, September 2022 data cuts.
5. STR Global RSA Hotel review data September 2022
6. Statistics South Africa, 30 November 2022, Q3 Quarterly Labour Force Survey data