

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR DECEMBER 2021

NOTE: To limit the spread of COVID-19 and prepare the health care sector, the South African government announced a 21-day national lockdown from 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, between 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 export specific cargo and permitted retail goods to neighbouring countries, which included all goods imported via South African ports of entry.

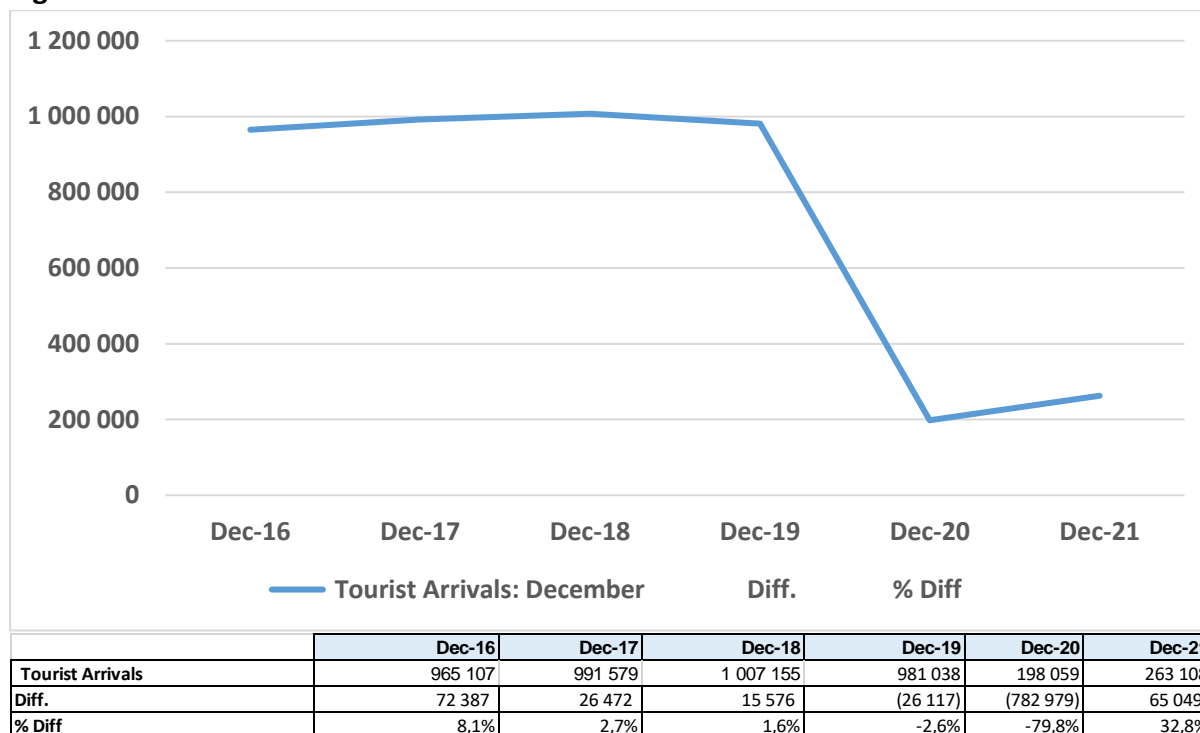
During December 2021, South Africa was under adjusted alert level 1, which allowed for international tourists to travel to the country subject to restrictions. These restrictions stipulated that all travellers visiting the country will be expected to abide by the regulations that include mandatory wearing of masks at all times, practising social distancing in public spaces, regular washing or sanitizing of hands and presenting a negative COVID-19 test result not older than 72 hours from the time of departure (<https://www.gov.za/covid-19/about/coronavirus-covid-19-alert-level-1>). Statistics South Africa (Stats SA) has therefore published data on the number of tourist arrivals during December 2021, and this report provides a further analysis of the tourists that travelled to South Africa during December 2021. The performance of tourist arrivals for the January-December 2021 period compared to January-December 2020 period are also provided in the report.

TREND ANALYSIS: DECEMBER 2016 – DECEMBER 2021

A total of 263 108 tourist arrivals was recorded in December 2021, which was an increase of 32.8% (65 049) compared to the same month in 2020.

Figure 1 below indicates tourist arrivals for the period December 2016 to December 2021. Tourist arrivals increased by 2.7% (26 472), from 965 107 in 2016 to 991 579 in 2017. Tourist arrivals further increased by 1.6% (15 576) in 2018, from 991 579 in 2017 to 1 007 155 in 2018. Then in December 2019, tourist arrivals decreased by -2.6% (-26,117) when compared to the same month in 2018. A further negative growth of -79.8% was seen in tourist arrivals in 2020, when tourist arrivals moved from 981 038 in December 2019 to 198 059 in December 2020.

Figure 1: Total Tourist Arrivals December 2016 to December 2021



Source: Stats SA Tourism and Migration report, December 2021 and tourist arrivals data cuts

TOURIST ARRIVALS BY REGION: DECEMBER 2021 COMPARED TO DECEMBER 2020

Table 1 below indicates tourist arrivals by region for December 2021 compared to the same month in 2020. All regions experienced an increase in tourist arrivals during December 2021 when compared to the same month in 2020, except for Middle East, which shown a decrease of -45,5% (-340). North America recorded the highest increase of 139,3% (6 498) followed by Central and South America (59,9%; 354), Australasia (38,8%; 233), Europe (29,6%; 7 951) and Asia with 16,1% (463) increase. Africa region also recorded an increase of 30,9% (49 851) and this region remained the main source of tourist arrivals to the country, accounting for 80,3% (211 209) of total tourist arrivals during December 2021.

Table 1: Total Tourist Arrivals by Region: December 2021 vs. December 2020

Region	DECEMBER 2021	DECEMBER 2020	Diff	% Diff.
EUROPE	34 831	26 880	7 951	29,6%
NORTH AMERICA	11 163	4 665	6 498	139,3%
CENTRAL & SOUTH AMERICA	945	591	354	59,9%
AUSTRALASIA	834	601	233	38,8%
MIDDLE EAST	408	748	-340	-45,5%
ASIA	3 335	2 872	463	16,1%
TOTAL OVERSEAS	51 516	36 357	15 159	41,7%
AFRICA	211 209	161 358	49 851	30,9%
Unspecified	383	344	39	11,3%
GRAND TOTAL	263 108	198 059	65 049	32,8%

Source: Stats SA Tourism and Migration Report, December 2021 and tourist arrivals data cuts

TOURIST ARRIVALS BY REGION: JANUARY-DECEMBER 2021 COMPARED TO JANUARY-DECEMBER 2020

Tourist arrivals figures by region for the January-December 2021 period compared to the same period in 2020 are indicated in table 2 below. Total tourist arrivals went down by -19,5% during January-December 2021 compared to January-December 2020. This was a decline from a total of 2 802 320 tourist arrivals seen during January-December 2020 to 2 255 699 (-546 621) total arrivals during January-December in 2021. Total tourist arrivals from the overseas market decreased by -42,8% (-283 226). Australasia (-80,0%) recorded the highest negative growth followed by Central and South America (-67,4%), Europe (-51,4%), and Asia (-24,0%). Middle East recorded a growth of 1,4% and North America had a slight increase of 0,01% during the period under review.

In Australasia, Australia had the highest decline in volume of -16 661 (-80,4%) followed by New Zealand (-3 033; -78,0%). In Central and South America, Brazil recorded the highest decline in volume (-14 022; -72,3%), and the United Kingdom had the highest decline in volume (-86 607; -65,4%) in the Europe region. Total tourist arrivals from Africa region decreased by -12,3% (-263 915), and this decline in volume was driven by Zimbabwe (-273 816; -40,0%), followed by Lesotho (-93 490; -20,8%) and Eswatini (-37 297; -17,4%), refer to table 3 below.

Table 2: Total Tourist Arrivals by Region January-December 2021 vs. January-December 2020

Region	Jan- Dec 2021	Jan- Dec 2020 <i>(Month of April to September: 0 tourists recorded)</i>	Diff	% Diff
EUROPE	217 241	446 653	-229 412	-51,4%
NORTH AMERICA	89 514	89 504	10	0,01%
CENTRAL & SOUTH AMERICA	9 889	30 368	-20 479	-67,4%
AUSTRALASIA	4 932	24 651	-19 719	-80,0%
MIDDLE EAST	12 574	12 399	175	1,4%
ASIA	43 654	57 455	-13 801	-24,0%
TOTAL OVERSEAS	377 804	661 030	-283 226	-42,8%
TOTAL AFRICA	1 873 609	2 137 524	-263 915	-12,3%
Unspecified	4 286	3 766	520	13,8%
GRAND TOTAL	2 255 699	2 802 320	-546 621	-19,5%

Source: Stats SA Tourism and Migration Report, December 2021 and tourist arrivals data cuts

Table 3 below gives the rankings of the top ten African source markets for the period January-December 2021 compared to January-December 2020. Most of the top ten African source markets moved their positions except for Eswatini, Botswana and Namibia which ranked in 4th, 5th and 6th positions respectively during both periods. Mozambique, Zambia, Tanzania and

DRC all moved up their positions in 2021. Mozambique was 3rd position during January-December 2020 and moved to 1st position during the same period in 2021; Zambia moved from 8th to 7th position and Tanzania improved its 10th position by moving to 9th position. During January-December 2020 period, the DRC entered the top ten list and removed Angola from the top ten African country rankings; moving up from the 12th position to 10th position during January-December 2021 period. Zimbabwe dropped from its 1st position to 2nd position and Lesotho moved from 2nd position to 3rd position. More than half of the top ten countries recorded a positive growth in international arrivals, with Namibia recording the highest positive growth of 67.8%, followed by Zambia (47,7%), DRC (42,6%), Mozambique (23,7%), Tanzania (20,7%) and Malawi (5,5%).

Table 3: South Africa's Top 10 African Source Markets: January-December 2021 vs. January-December 2020

Country	Rank: Jan-Dec 2021	Tourist Arrivals Jan-Dec 2021	Rank: Jan-Dec 2020 <i>(Month of April to September: 0 tourists recorded)</i>	Tourist Arrivals Jan-Dec 2020	% Change from Jan-Dec 2020 to Jan-Dec 2021
Mozambique	1	522 866	3	422 537	23,7%
Zimbabwe	2	410 730	1	684 546	-40,0%
Lesotho	3	355 255	2	448 745	-20,8%
Eswatini	4	177 650	4	214 947	-17,4%
Botswana	5	103 158	5	129 467	-20,3%
Namibia	6	91 471	6	54 511	67,8%
Zambia	7	68 669	8	46 486	47,7%
Malawi	8	56 313	7	53 365	5,5%
Tanzania	9	13 248	10	10 977	20,7%
DRC	10	12 918	12	9 062	42,6%

Source: Stats SA and tourist arrivals data cuts December 2021

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-December 2021 with January-December 2020, most of the top 10 overseas markets recorded a decrease in tourist arrivals except for Russia Federation and the USA, which increased by 63,3% and 14,0% respectively. All overseas source markets moved their positions during the period under review, with USA replacing UK as the main overseas source market. In the January-December 2021 top ten overseas source market list, Brazil and Australia were replaced by Russian Federation and Belgium.

Table 4: South Africa's Top 10 Overseas Source Markets: January-December 2021 vs. January-December 2020

Country	Rank: Jan-Dec 2021	Tourist Arrivals Jan-Dec 2021	Rank: Jan-Dec 2020 <i>(Month of April to September: 0 tourists recorded)</i>	Tourist Arrivals Jan-Dec 2020	% Change from Jan-Dec 2020 to Jan-Dec 2021
USA	1	82 020	3	71 959	14,0%
UK	2	45 777	1	132 384	-65,4%
Germany	3	44 388	2	106 092	-58,2%
The Netherlands	4	21 757	5	35 026	-37,9%
France	5	19 761	4	41 023	-51,8%
India	6	17 662	8	18 892	-6,5%
Switzerland	7	11 375	10	15 697	-27,5%
Russian Federation	8	10 625	19	6 494	63,6%
Belgium	9	9 106	12	12 726	-28,4%
Canada	10	7 494	9	17 545	-57,3%

Source: Stats SA and tourist arrivals data cuts December 2021

References:

1. Statistics South Africa February 22nd 2022, December Tourism and Migration report.