

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

NOTE: To limit the spread of COVID-19 and prepare the health care sector, the South African government announced a national lockdown for the country starting from 27 March 2020, which prevented the movement of people entering and leaving South Africa. As a result of the increased levels of infection, the government announced a 21-day lockdown starting from 27 March 2020. 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.

During January 2022, South Africa was under adjusted alert level 1 which allowed for international tourists to travel to the country subject to restrictions. These restrictions included that all travellers visiting the country will be expected to abide by the regulations which 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 tourists during January 2022, and this report provides a further analysis of the tourists that travelled to South Africa during January 2022. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for January 2022 compared to January 2021 is also provided in this report.

TREND ANALYSIS: JANUARY 2017 – JANUARY 2022

A total of 377 651 tourist arrivals was recorded in January 2022, which was an increase of 171,4% (238 517) compared to the same month in 2021. The increase experienced in January 2022 compared to the same month in 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 January 2017 to January 2022. Tourist arrivals increased from 1 040 534 in 2017 to 1 103 940 in 2018, which was an increase of 6,1% (63 406). Tourist arrivals decreased from 1 130 940 in 2018 to 1 068 190 in 2019, which was a decrease of -3,2% (-35 750). However, tourist arrivals increased by 2,3% (25 078) in January 2020 compared to the same month in 2019. Comparing January 2021 with January 2020, a decline of -87,3% (954 134) in tourist arrivals was seen.

Figure 1: Total Tourist Arrivals January 2017 to January 2022



	Jan-17	Jan-18	Jan-19	Jan-20	Jan-21	Jan-22
Tourist Arrivals	1,040,534	1,103,940	1,068,190	1,093,268	139,134	377,651
Difference	27,893	63,406	(35,750)	25,078	(954,134)	238,517
% Growth	2.8%	6.1%	-3.2%	2.3%	-87.3%	171.4%

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

JANUARY 2022 COMPARED TO JANUARY 2021 BY REGION

Table 1 below indicates tourist arrivals by region for January 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 626,9% (1 398) followed by Europe (447,4%; 38 846) and North America (315,4%; 6 787). Africa also recorded an increase of 149,5% (187 215) and this region remains the main source of tourist arrivals to the country, accounting for 82,7% (312 440) of total tourist arrivals during January 2022.

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

Region	JANUARY 2022	JANUARY 2021	Diff	% Diff.
EUROPE	47,528	8,682	38,846	447.4%
NORTH AMERICA	8,939	2,152	6,787	315.4%
CENTRAL & SOUTH AMERICA	1,065	401	664	165.6%
AUSTRALASIA	1,621	223	1,398	626.9%
MIDDLE EAST	823	359	464	129.2%
ASIA	4,738	1870	2,868	153.4%
TOTAL OVERSEAS	64,714	13,687	51,027	372.8%
AFRICA	312,440	125,225	187,215	149.5%
Unspecified	497	222	275	123.9%
GRAND TOTAL	377,651	139,134	238,517	171.4%

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

Table 1.1 below gives the rankings of the top ten African source markets for the period January 2022 compared to January 2021. All of the top ten African source markets moved their positions except for Eswatini, which ranked 4th position during both periods. Mozambique, Lesotho, Malawi, Botswana and Tanzania all moved up their positions in 2022 when compared to 2021. Zimbabwe dropped from 1st position in 2021 to 3rd position in 2022. Namibia also dropped from

5th to 6th position, Zambia from 7th to 8th position and Nigeria from 9th to 10th position in 2022. Tanzania replaced DRC in the top 10 list in January 2022. All top ten countries recorded a positive growth with Malawi recording the highest increase of 244,3% followed by Mozambique (235,4%) and Eswatini (214,4%).

Table 1.1: South Africa's Top 10 African Source Markets: January 2022 vs. January 2021

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
Mozambique	1	96,511	2	28,771	235.4%
Lesotho	2	84,960	3	27,628	207.5%
Zimbabwe	3	62,809	1	40,579	54.8%
Eswatini	4	21,854	4	6,951	214.4%
Botswana	5	11,834	6	4,425	167.4%
Namibia	6	8,376	5	4,998	67.6%
Malawi	7	8,216	8	2,386	244.3%
Zambia	8	7,638	7	4,167	83.3%
Tanzania	9	1,556	11	722	115.5%
Nigeria	10	1,548	9	1,147	35.0%

Source: Stats SA Tourism and Migration Report, January 2022

Table 1.2 shows the rankings of the top ten overseas source markets. Comparing January 2022 with January 2021, all top 10 overseas markets recorded an increase in tourist arrivals. None of the top ten overseas markets remained in the same position for the period under review. UK replaced USA as the main source market from overseas, recording a growth of 853,0%. Russian Federation and China were replaced by Australia and Ireland in the top 10 list during January 2022 compared to January 2021.

Table 1.2: South Africa's Top 10 Overseas Source Markets: January 2022 vs. January 2021

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
UK	1	16,086	2	1,688	853.0%
Germany	2	10,136	3	1,557	551.0%
USA	3	7,861	1	1,844	326.3%
The Netherlands	4	5,608	6	620	804.5%
France	5	2,314	4	1,128	105.1%
Switzerland	6	2,289	9	320	615.3%
India	7	1,863	5	710	162.4%
Australia	8	1,459	18	180	710.6%
Belgium	9	1,393	8	380	266.6%
Ireland	10	1,080	24	135	700.0%

Source: Stats SA Tourism and Migration Report, January 2022

PERFORMANCE OF SOUTH AFRICA’S TOURISM RELATED INDUSTRIES: JANUARY 2022 COMPARED TO JANUARY 2021

The next section of the report is about the performance of tourism related industries during January 2022 compared to January 2021.

Impact of Coronavirus (COVID-19) on tourism related industries performance

On 11 March 2020, the World Health Organisation (WHO) had declared the Coronavirus (COVID-19) outbreak a pandemic (WHO, 2020). In order 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. For the month of January 2022, South Africa was under adjusted level 1, which was from 01 October 2021-30 January 2022. The table below provides a summary of the lockdown regulations of the different levels for the accommodation, food and beverage and aviation industries for January 2022 and January 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 2: South Africa COVID-19 regulations for accommodation, food and beverages and aviation industries for the period January 2022 and January 2021

Jan 2022 Adjusted Level One	Jan 2021 Adjusted Alert Level Three
ACCOMMODATION	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.	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	FOOD AND BEVERAGES
Restaurants all allowed to operate but subject to the strict adherence to all health protocols and must close at 8pm. Alcohol prohibited. Regulations changed on 01 Feb 2020: Restaurants all allowed to operate but subject to the strict adherence to all health protocols and must close at 10pm. Alcohol is prohibited.	Restaurants all allowed to operate but subject to the strict adherence to all health protocols
AVIATION	AVIATION
Domestic air travel allowed. International travel allowed.	Domestic air travel allowed. International travel allowed.

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

2.1 ACCOMMODATION INDUSTRY: JANUARY 2022

ACCOMMODATION INDUSTRY INCOME: JANUARY 2022 COMPARED TO JANUARY 2021

Table 3 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 January 2022 compared to January 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During January 2022, the total income (current prices) from the accommodation industry showed an increase of 120,6% compared to January 2021. Total income from all categories recorded an increase, with total income from hotels recording the highest increase of about 179.8% moving from R720,1 million in January 2021 to R2 015,0 million in January 2022.

Table 3: Income from accommodation (current prices: January 2022 compared to January 2021)

Type of Accommodation	Jan 2022				Jan 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Jan 2022 compared to Jan 2021
Hotels (R million)	R326,6	R652,8	R1 035,6	R2 015,0	R119,4	R307,6	R293,1	R720,1	179,8%
Caravan parks and camping sites (R million)	R0,7	R27,2	R0,1	R28,0	R0,3	R23,0	R0,3	R23,6	18,6%
Guest houses and guest farms (R million)	R6,4	R82,4	R2,8	R91,6	R4,4	R46,2	R1,8	R52,4	74,8%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified)	R64,5	R452,2	R34,2	R550,9	R38,6	R357,7	R24,7	R421,0	30,9%

Type of Accommodation	Jan 2022				Jan 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Jan 2022 compared to Jan 2021
(R million)									
Total Industry - (R million)	R398,2	R1 214,6	R1 072,7	R2 685,5	R162,7	R734,5	R319,9	R1 217,1	120,6%

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

Table 4 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 65,4% during January 2022. All categories of accommodation showed an increase in income levels with hotels recording the highest increase of 112,2%; followed by guest houses and guest farms (78,4%), other accommodation (26,4%) and caravan parks and camping sites (18,3%).

Table 4: Income from Accommodation (Excluding restaurants, bar sales and other income): Jan 2022 compared to Jan 2021

Type of Accommodation	Jan 2022 Accommodation only	Jan 2021 Accommodation only	% Change Jan 2022 compared to Jan 2021
Hotels (R million)	R652,8	R307,6	112,2%
Caravan parks and camping sites (R million)	R27,2	R23,0	18,3%
Guest houses and guest farms (R million)	R82,4	R46,2	78,4%
Other accommodation (R million)	R452,2	R357,7	26,4%
Total Industry – (R million)	R1 214,6	R734,5	65,4%

Source: Stats SA: Accommodation data cuts, 22 March 2021

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) for January 2022 compared to January 2021 is provided in table 5 below. Income from accommodation only showed an increase of 65,4% during January 2022 compared to the same month in 2021 as already indicated.

Table 5: Year on Year Change in income from Accommodation

MONTH	2021	2022
January	-70,9%	65,4%

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

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JANUARY 2022 COMPARED TO JANUARY 2021

Table 6 below indicates occupancy rates by accommodation type for January 2022 compared January 2021. The total accommodation occupancy rate showed in January 2022 was 26,3%, which was an increase compared to 18,2% recorded in January 2021. The occupancy rate of all accommodation establishments increased in January 2022 compared to the same month last year except for caravan parks and camping sites, which showed a decline of 24,5% in January 2022 from 24,8% seen in January 2021.

Table 6: Occupancy Rate: Jan 2022 compared to Jan 2021

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jan-21	14,3	24,8	12,8	25,2	18,2
Jan-22	27,2	24,5	17,4	28,2	26,3

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

In addition to the 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 January 2022 compared to January 2021 is provided in table 7 below. It is important to note that the STR hotel data information for January 2022 and January 2021 is from a sample of 234 hotels that is drawn from a census/population of 420 hotels. There was an increase recorded in all hotel performance indicators in January 2022 compared to January 2021. Hotel occupancy rate increased by 97,4% in January 2022 compared to January 2021, from an occupancy rate of 20,5% in January 2021 to 40,5% in January 2022. The Average Daily Rate (ADR) for January 2022 was R1 346,8 which was an increase of 19,6% compared to R1 127,4 seen in January 2021. The Revenue Per available room also increased by 136,2%; from R231,5 in January 2021 compared to R564,9 in January 2022.

Table 7: South Africa Hotel Performance: November 2021 compared to November 2020

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
22-Jan	40,5	97,4%	1 348,8	19,6%	564,9	136,2%	420	234
21-Jan	20,5		1 127,4		231,5			

Source: STR Hotel Data January 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JANUARY 2022 COMPARED TO JANUARY 2021

The results in table 8 indicates that the total income for the food and beverages industry in January 2022 was about R5 288,8 million, which was an increase of 58,4% compared to R3 338,2 million in January 2021. All food and beverages industry categories showed an increase in income, with restaurant and coffee shops having the highest increase of 84,1% followed by take-away and fast food outlets (43,0%) and catering services (22,7%).

Table 8: Total income by type of food and beverage industry: January 2022 compared to January 2021

Categories of Food and Beverages	Jan-22	Jan-21	% Change
Catering services (R million)	R635,4	R517,9	22,7%
Take-away and fast food outlets (R million)	R1 878,3	R1 313,1	43,0%
Restaurants and coffee shops (R million)	R2 775,1	R1 507,2	84,1%
Total Industry (R million)	R5 288,8	R3 338,2	58,4%

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

The monthly percentage change of income from the food and beverages industry for January 2022 compared to January 2021 is provided in table 12 below. Income from food and beverages industry recorded an increase of 58,4% during January 2022 compared to the same month in 2021.

Table 9: Year on Year Change in income from food and beverage industry: January 2022 compared to January 2021

MONTH	2021	2022
January	-46,5%	58,4%

Source: Stats SA: January Food and beverages data cuts and report, 22 March 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: JANUARY 2022 COMPARED TO JANUARY 2021

Table 10 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during January 2022 compared to January 2021. Total passenger arrivals increased by 91,0%; from 520 435 in January 2021 to 993 852 in January 2022. International passengers showed the highest increase of 156,5% followed by regional (124,1%), unscheduled (92,7%) and domestic passengers (81,1%).

Table 10: Arriving Passengers: January 2022 compared to January 2021

Arriving Passengers	Jan-22	Jan-21	% Change
International	163 707	63 822	156,5%
Regional	15 460	6 900	124,1%
Domestic	809 975	447 269	81,1%
Unscheduled	4 710	2 444	92,7%
Total	993 852	520 435	91,0%

Source: ACSAs data cuts, January 2022

PASSENGER DEPARTURE MOVEMENT: JANUARY 2022 COMPARED TO JANUARY 2021

Table 11 provides the total passenger departing from Airports Company South Africa (ACSA) airports during January 2022 compared to January 2021. Total departing passengers increased by 85,6%; from 542 929 in January 2021 to 1 007 570 in January 2022. The table further indicates that regional passengers departing had the highest increase of 140,9% followed by international (98,7%), domestic (82,3%) and unscheduled passengers (73,0%).

Table 11: Departing Passengers: January 2022 compared to January 2021

Departing Passengers	Jan-22	Jan-21	% Change
International	173 157	87 125	98,7%
Regional	14 750	6 124	140,9%
Domestic	815 270	447 140	82,3%
Unscheduled	4 393	2 540	73,0%
Total	1 007 570	542 929	85,6%

Source: ACSAs data cuts, January 2022

References:

1. Statistics South Africa March 29th 2021, Tourism and Migration report.
2. Statistics South Africa, January 2022, Accommodation data cuts.
3. Statistics South Africa, January 2022, Food and Beverage data cuts.
4. Airports Company South Africa, January 2022 data cuts.
5. STR Global RSA Hotel review data January 2022