tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM PERFORMANCE REPORT
MARCH 2022

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR MARCH 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 March 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 March 2022, and this report provides a further analysis of the tourists that travelled to South Africa during March 2022. The performance of key related tourism industries namely; accommodation, food and beverages, and aviation for March 2022 compared to March 2021 is included in the report. Furthermore, the quarterly tourism performance for the period Jan-March 2022 compared to same period in 2021 is also discussed in the report.

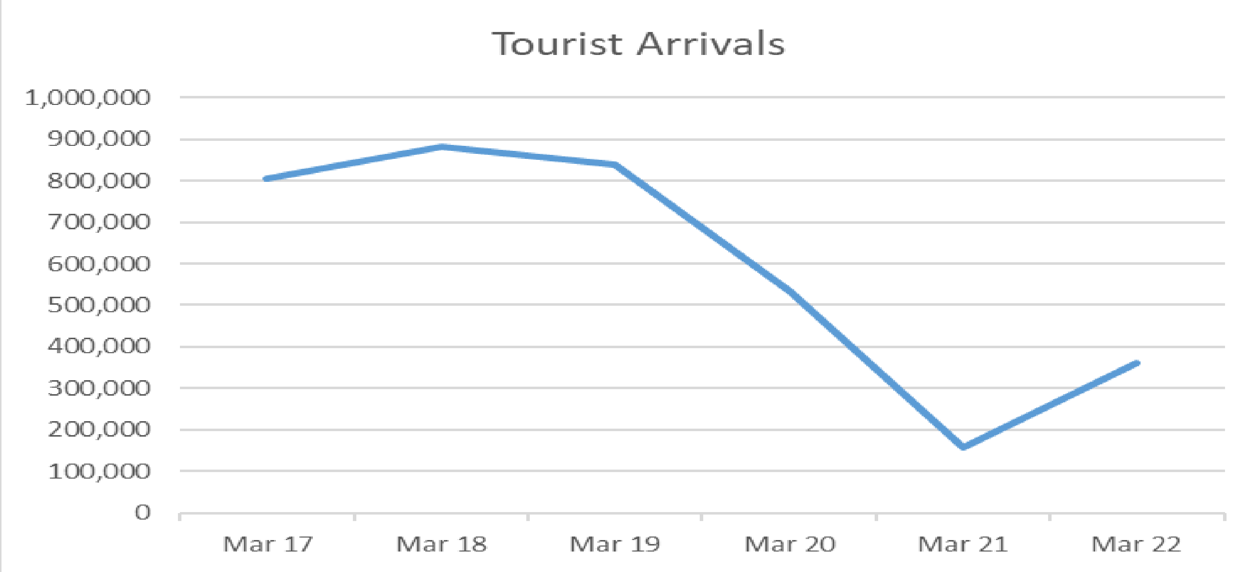
TREND ANALYSIS: MARCH 2017 – MARCH 2022

A total of 359 734 tourist arrivals was recorded in March 2022, which was an increase of 128,2% (202 096) compared to the same month in 2021. The increase experienced in March 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 March 2017 to March 2022. Tourist arrivals increased from 805 857 in 2017 to 882 749 in 2018, which was an increase of 9,5% (76 892). Tourist arrivals decreased from 882 749 in 2018 to 838 696 in 2019, which was a decrease of -5,0% (-44 053). Tourist arrivals further decreased by -36,2% (303 602) in March

2020 compared to the same month in 2019. Comparing March 2021 with March 2020, a decline of -70,5% (377 456) in tourist arrivals was seen.

Figure 1: Total Tourist Arrivals March 2017 to March 2022



	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22
Tourist Arrivals	805 857	882 749	838 696	535 094	157 638	359 734
Difference	(98 737)	76 892	(44 053)	(303 602)	(377 456)	202 096
% Growth	-10,9%	9,5%	-5,0%	-36,2%	-70,5%	128,2%

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

MARCH 2022 COMPARED TO MARCH 2021 BY REGION

Table 1 below indicates tourist arrivals by region for March 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 1 288,4% (+3 234) followed by Europe (672,9%; + 64 292) and North America (575,3%; +16 811). Africa also recorded an increase of 78,9% (+110 319) and this region remains the main source of tourist arrivals to the country, accounting for 69,5% (250 113) of total tourist arrivals during March 2022.

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

Region	March 2022	March 2021	Diff	% Diff.
EUROPE	73,847	9,555	64,292	672.9%
NORTH AMERICA	19,733	2,922	16,811	575.3%
CENTRAL & SOUTH AMERICA	2,044	493	1,551	314.6%
AUSTRALASIA	3,485	251	3,234	1,288.4%
MIDDLE EAST	2,563	593	1,970	332.2%
ASIA	7,302	3,734	3,568	95.6%
TOTAL OVERSEAS	108,974	17,548	91,426	521.0%
AFRICA	250,113	139,794	110,319	78.9%
UNSPECIFIED	647	296	351	118.6%
GRAND TOTAL	359,734	157,638	202,096	128.2%

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

JANUARY-MARCH 2022 COMPARED TO JANUARY-MARCH 2021

Tourist arrivals figures by region for the period January-March 2022 compared to the period January-March 2021 are indicated in table 2 below. Total tourist arrivals went up by 170,7% for the period January-March 2022 compared the period January-March 2021. This was a growth from a total of 386 937 tourist arrivals recorded during January-March 2021 to 1 047 558 during the period January-March in 2022. Total tourist arrivals from the overseas market increased by 537,4% (+225 607). Australasia (1 017,5%) recorded the highest positive growth followed by Europe (683,1%), North America (519,9%), Middle East (329,7%), Central and South America (251,7%), and Asia (129,2%).

In Australasia, Australia recorded the highest increase in volume having an increase of 5 765 (1 091,9%) followed by New Zealand (737; 688,80%). The United Kingdom had recorded the highest increase in volume (61 522; 1 386,9%) in the Europe region. In North America, USA has recorded the highest increase in volume (29 139; 507,5%). Israel had recorded the highest increase in volume for the Middle East region with an addition 2 110 tourists compared to January-March 2021. In Central and South America, Brazil had recorded the highest increase in volume (212,9%) for the period under review.

Tourist arrivals from Africa increased by 126,1% (+434 028) during the same period under review. In terms of volume, the increase recorded from the continent was driven Mozambique (+127 117, 137,0%), followed by Lesotho (+109 495; 172,5%) and Zimbabwe (+80 013; 89,9%), refer to table 2.1 below.

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

Region	Jan-Mar 2022	Jan-Mar 2021	Diff	% Diff
EUROPE	192,949	24,640	168,309	683.1%
NORTH AMERICA	40,256	6,494	33,762	519.9%
CENTRAL & SOUTH AMERICA	4,344	1,235	3,109	251.7%
AUSTRALASIA	7,152	640	6,512	1,017.5%
MIDDLE EAST	4,976	1,158	3,818	329.7%
ASIA	17,910	7,813	10,097	129.2%
TOTAL OVERSEAS	267,587	41,980	225,607	537.4%
AFRICA	778,313	344,285	434,028	126.1%
UNSPECIFIED	1,658	672	986	146.7%
GRAND TOTAL	1,047,558	386,937	660,621	170.7%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period Jan-March 2022 compared to Jan-March 2021. Most of the top ten African source markets moved their positions except for Mozambique, Eswatini, Zambia and Malawi which ranked 1st, 4th, 7th and 8th position during both periods. Lesotho and Botswana moved up their positions from 3rd to 2nd and from 6th to 5th respectfully in 2022 when compared to 2021. Angola and Tanzania replaced Nigeria and DRC in the top 10 during this period. All top ten countries recorded a positive growth with Angola recording the highest increase of 663,8% followed by Lesotho (172,5%) and Botswana (159,6%).

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

Country	Rank: Jan-March 2022	Tourist Arrivals Jan-March 2022	Rank: Jan-March 2021	Tourist Arrivals Jan-March 2021	% Change from Jan-Mar 2021 to Jan-Mar 2022
Mozambique	1	219,887	1	92,770	137.0%
Lesotho	2	172,960	3	63,465	172.5%
Zimbabwe	3	169,031	2	89,018	89.9%
Eswatini	4	67,495	4	28,649	135.6%
Botswana	5	38,660	6	14,891	159.6%
Namibia	6	28,498	5	18,179	56.8%
Zambia	7	23,773	7	13,136	81.0%
Malawi	8	21,704	8	8,743	148.2%
Angola	9	5,690	15	745	663.8%
Tanzania	10	5,197	11	2,191	137.2%

Source: Stats SA Tourism and Migration Report, March 2022

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing Jan-March 2022 with Jan-March 2021, all top 10 overseas markets recorded an increase in tourist arrivals. All of the top ten overseas markets moved positions for the period under review. UK replaced USA as the main source market from overseas, recording a growth of 1 386, 9%. China, Pakistan and Russian Federation were replaced by Australia, Belgium and Canada in the top 10 list during Jan-March 2022 compared to Jan-March 2021.

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

Country	Rank: Jan-March 2022	Tourist Arrivals Jan-March 2022	Rank: Jan-March 2021	Tourist Arrivals Jan March 2021	% Change from Jan-Mar 2021 to Jan- Mar 2022
UK	1	65,958	3	4,436	1 386.9%
Germany	2	42,528	2	4,938	761.2%
USA	3	34,881	1	5,742	507.5%
The Netherlands	4	17,363	7	1,700	921.4%
France	5	13,492	5	2,591	420.7%
India	6	7,761	4	3,121	148.7%
Switzerland	7	7,732	10	1,058	630.8%
Australia	8	6,293	18	528	1 091.9%
Belgium	9	5,898	11	875	574.1%
Canada	10	5,375	13	752	614.8%

Source: Stats SA Tourism and Migration Report, March 2022

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

The next section of the report is about the performance of tourism related industries during March 2022 compared to March 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 March 2022, South Africa was under adjusted level 1, which was from 01 October 2021-30 March 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 Jan-March 2022 and Jan-March 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 March 2022 and March 2021

Jan-March 2022
Adjusted Level One

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 and must close at 8pm. Alcohol prohibited.
AVIATION
Domestic air travel allowed. International travel allowed.

Adjusted Level 3 29 December 2021- 28 Feb 2021	Adjusted alert level 1 1 March 2021 to 30 May 2021.
Accommodation	
All accommodation establishments not permitted to operate exceptions only for rendering essential services, quarantaine and isolation.	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 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. Sale of alcohol permitted.
Aviation	
Domestic air travel allowed. International travel allowed as of 01 October 2020	Domestic air travel allowed. International travel allowed as of 01 October 2020.

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

2.1 ACCOMMODATION INDUSTRY: MARCH 2022

ACCOMMODATION INDUSTRY INCOME: MARCH 2022 COMPARED TO MARCH 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 March 2022 compared to March 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During March 2022, the total income (current prices) from the accommodation industry showed an increase of 110,6% compared to March 2021. Total income from all categories recorded an increase and total income from hotels recorded the highest increase of about 129,8% moving from R1 087,0 million in March 2021 to R2 497,9 million in March 2022.

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

Type of Accommodation	Mar 2022				Mar 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Mar 2022 compared to Mar 2021
Hotels (R million)	R467.0	R926.0	R1,104.9	R2,497.9	R233.5	R440.4	R413.1	R1,087.0	129.8%
Caravan parks and camping sites (R million)	R0.4	R23.7	R0.1	R24.2	R0.3	R22.5	R0.6	R23.4	3.4%
Guest houses and guest farms (R million)	R7.2	R84.1	R2.1	R93.4	R5.1	R46.9	R1.4	R53.4	74.9%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R112.1	R642.5	R64.5	R819.1	R54.3	R383.6	R28.8	R466.7	75.5%
Total Industry - (R million)	R586.7	R1,676.3	R1,171.6	R3,434.6	R293.2	R893.4	R443.9	R1,630.5	110.6%

Source: Stats SA: Accommodation data cuts, 06 June 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 87,6% during March 2022. All categories of accommodation showed an increase in income levels with hotels recording the highest increase of 110,3%; followed by guest houses and guest farms (79,3%); other accommodation (67,5%) and caravan parks and camping sites (5,3%). The month on month percentage changes of income from accommodation industry (excluding restaurants, bar sales and other income) for January to March 2022 compared to the same months in 2021 are provided in table 6 below

The quarterly analysis for Jan-Mar 2022 compared to Jan-Mar 2021 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 83,3% during January-March 2022 compared to the same period in 2021. All categories of accommodation recorded an increase in income levels. The highest increase was from the hotel industry with an increase of about 118,0%; followed by guest houses and guest farms (105,1%), other accommodation (48,9%) and caravan parks and camping sites (6,6%).

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

Type of Accommodation	Mar 2022	Mar 2021	% Change Mar 2022 compared to Mar 2021	Jan-March 2022	Jan-March 2021	% Change Mar 2022 compared to Mar 2021
Hotels (R million)	R926.0	R440.4	110.3%	R2 297,9	R1 054,3	118,0%
Caravan parks and camping sites (R million)	R23.7	R22.5	5.3%	R63,3	R59,4	6,6%
Guest houses and guest farms (R million)	R84.1	R46.9	79.3%	R279,6	R136,3	105,1%
Other accommodation (R million)	R642.5	R383.6	67.5%	R1 516,8	R1 018,8	48,9%
Total Industry – (R million)	R1,676.3	R893.4	87.6%	R4 157,6	R2 268,8	83,3%

Source: Stats SA: Accommodation data cuts, 06 June 2022

Table 6: Year on Year Change in income from Accommodation

MONTH	2019	2020	2021	2022
January	-4,2%	5,3%	-70,9%	65,5%
February	-3,5%	9,4%	-75,1%	97,5%
March	-0,1%	-41,1%	-40,6%	87,6%

Source: Stats SA: Accommodation data cuts, 06 June 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JAN-MARCH 2022 COMPARED TO JAN-MARCH 2021

Table 7 below indicates occupancy rates by accommodation type for Jan-March 2022 compared Jan-March 2021. The total accommodation occupancy rate in March 2022 was 35%, which was an increase compared to 23,5% recorded in March 2021. The occupancy rate of all accommodation establishments increased in March 2022 compared to the same month last year, except for Caravan Parks and Camping Site with a slight decline from 29,1% during March 2021 to 28.2% during the same month in 2022.

Table 7: Occupancy Rate: January to March 2022 compared to January to March 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%
Feb-21	16,3%	25,6%	13,3%	25%	19,4%
Feb-22	35,5%	20,1%	22,5%	28,6%	30,9%
Mar-21	21.6%	29.1%	13.8%	28.4%	23.5%
Mar-22	38.8%	28.2%	18.7%	35.5%	35.0%

Source: Stats SA: Accommodation data cuts, 06 May 2022

In addition to the Stats SA's monthly 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 March 2022 compared to March 2021 is provided in table 8 below. It is important to note that the STR hotel data information for March 2022 and March 2021 is from a sample of 237 hotels that was drawn from a census/population of 423 hotels. There was an increase recorded in all hotel performance indicators in March 2022 compared to March 2021. Hotel occupancy rate increased by 69,2% in March 2022 compared to March 2021, moving from an occupancy rate of 35,2% in March 2021 to 59,5% in March 2022. The Average Daily Rate (ADR) for March 2022 was R1 278,0 which was an increase of 22,5% compared to R1 043,3 recorded in March 2021. The Revenue Per available room also increased by 107,3%; moving from R366,8 in March 2021 compared to R760,3 in March 2022.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
22-Mar	59.5	69.2%	R1,278.0	22.5%	R760.3	107.3%	423	237
21-Mar	35.2		R1,043.3		R366.8			

Source: STR Hotel Data MARCH 2022

The performance of the South African hotel industry for January, February and March 2022 compared to same months of the previous year (2021) is provided in table 8.1 below. The sample size and population for each month is also provided in the table. Comparing the occupancy rates for the months of January, February and March 2022 to same months in 2021 there has been an increase in occupancy rates, with January 2022 having the highest percentage change of 97,4% compared to January 2021. The Average Daily Rate (ADR) for January, February and March 2022 also increased compared to the same months in the previous year. The Revenue Per available room during January, February and March 2022 also increased compared to same months in 2020.

Table 8.1: South Africa Hotel Performance: January-March 2022 compared to January-March 2021

Indicators	Size		Occ %		ADR		RevPAR		Percent Change		
Months	**Census**	**Sample**	**2022**	**2021**	**2022**	**2021**	**2022**	**2021**	**Occ**	**ADR**	**RevPAR**
January	420	234	40,5	20,5	R1,348,8	R1,127,4	R547	R231,5	97,4%	19,6%	136,2%
February	422	240	52,6	28,0	R1,269,6	R1,017,1	R667,6	R284,5	88,0%	24,8%	134,7%
March	423	237	59,5	35,2	R1,278.0	R1,043.3	R760.3	R366.8	69.2%	22.5%	107.3%

Source: STR Hotel Data January, February and MARCH 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: MARCH 2022 COMPARED TO MARCH 2021 AT CONSTANT 2015 PRICES (R MILLION)

The results in table 9 indicates that the total income (constant price) for the food and beverages industry in March 2022 was about R4 061,0 million, which was an increase of 13,6% compared to R3 574,8 million in March 2021. All food and beverages industry categories showed an increase in income, with take-away and fast food outlets having the highest increase of 21,8% followed by catering services (12,4%) and restaurant and coffee shops (8,9%).

The total income of the food and beverages industry for the period January-March 2022 compared to same period of the previous year is also shown in the figure below. The total income of the food and beverages industry was about R 11 430 million in January-March 2022, recording an increase of 23,9% when compared to income of about R9 224,5 million during the same period in 2021. All categories of food and beverages industry experienced an increase, with the highest positive growth seen in take-away and fast food outlets (25,2%), followed by catering services (23,4%) and restaurants and coffee shops (23,2%).

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: March 2022 compared to March 2021 and January-March 2022 compared to January to March 2021

Categories of Food and Beverages	Mar-22	Mar-21	% Change	Jan-March 2022	Jan-March 2021	% Change
Catering services (R million)	R614.8	R546.8	12.4%	R1 670,0	R1 353,2	23,4%
Take-away and fast food outlets (R million)	R1,407.3	R1,155.6	21.8%	R4 011,6	R3 203,7	25,2%
Restaurants and coffee shops (R million)	R2,038.9	R1,872.4	8.9%	R5 748,4	R4 667,6	23,2%
Total Industry (R million)	R4,061.0	R3,574.8	13.6%	R11 430,0	R9 224,5	23,9%

Source: Stats SA: Food and beverages data cuts, 23 May 2022

The monthly percentage change of income from the food and beverages industry for March 2022 compared to March 2021 is provided in table 10 below. Income from food and beverages industry recorded an increase of 13,6% during March 2022 compared to the same month in 2021. This was an improvement from a decline -4,6% of recorded during March 2021 compared to the same month in 2020.

Table 10: Monthly change in Income from food and beverage industry: March 2022 compared to March 2021 at constant 2015 prices (R million)

MONTH	2021	2022
January	47,2%	46,8%
February	-35,5%	16,9%
March	-4,6%	13.6%

Source: Stats SA: March Food and beverages data cuts and report, 23 May 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: MARCH 2022 COMPARED TO MARCH 2021 and JANUARY-MARCH 2022 COMPARED TO JANUARY TO MARCH 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during March 2022 compared to March 2021. Total passenger arrivals increased by 64,1%; from 776 075 in March 2021 to 1 273 643 in March 2022. International passengers showed the highest increase of 305,0% followed by regional (170,9%), unscheduled passengers (72,8%) and domestic (40,6%).

The table below also shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during January-March 2022 compared to January-March 2021. Total passenger arrivals increased by 85,5%, moving from 1 784 120 in January-March 2021 to 3 309 931 during the same months in 2022.

International passengers had the highest increase of 262,5% in January-March 2022 compared to January-March 2021. Regional passengers arriving during January-March 2022 increased by 159,5% compared to the same period in 2021. The number of domestic passengers also increased by 65,3%, from 1 580 829 in January-March 2021 to 2 612 754 in January-March 2022. Passengers arriving on unscheduled flights also recorded an increase of 73,7%.

Table 11: Arriving Passengers: March 2022 compared to March 2021 and January-March 2022 compared to January to March 2021

Arriving Passengers	Mar-22	Mar-21	% Change	Jan-March 2022	Jan-March 2021	% Change
International	259,331	64,026	305.0%	624 341	172 224	262,5%
Regional	24,112	8,902	170.9%	57 070	21 989	159,5%
Domestic	983,456	699,245	40.6%	2 612 754	1 580 829	65,3%
Unscheduled	6,744	3,902	72.8%	15 766	9 078	73,7%
Total	1,273,643	776,075	64.1%	3 309 931	1 784 120	85,5%

Source: ACSAs data cuts, March 2022

PASSENGER DEPARTURE MOVEMENT: MARCH 2022 COMPARED TO MARCH 2021 AND JANUARY-MARCH 2022 COMPARED TO JANUARY TO MARCH 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during March 2022 compared to March 2021. Total departing passengers increased by 67,1%; from 781 146 in March 2021 to 1 305 356 in March 2022. The table further indicates that international passengers departing had the highest increase of 328,9% followed by regional (176,3%), unscheduled passengers (67,1%) and domestic (40,5%).

The table below shows the total passengers departing from ACSA airports during the period January-March 2022 compared to January-March 2021. Total passengers departing from the country increased by 84,6% in January-March 2022 compared to 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 226,3% (660 146) from 202 286 that was recorded during January-March 2022.

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

Departing Passengers	Mar-22	Mar-21	% Change	Jan-March 2022	Jan-March 2021	% Change
International	288,831	67,350	328.9%	660 146	202 286	226,3%
Regional	25,574	9,256	176.3%	57 673	21 053	173,9%
Domestic	984,583	700,833	40.5%	2 618 336	1 583 243	65,4%
Unscheduled	6,368	3,707	71.8%	15 103	9 296	62,5%
Total	1,305,356	781,146	67.1%	3 351 258	1 815 878	84,6%

Source: ACSAs data cuts, March 2022

2.4 TOURISM RELATED INDUSTRY EMPLOYMENT JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020

EMPLOYMENT OF TOURISM RELATED INDUSTRIES JANUARY-MARCH 2022 COMPARED TO JANUARY-MARCH 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 for tourism related industries which are identified in the Tourism Satellite Account. It is important to also note that as a result of COVID-19, Stats SA has suspended face-to-face data collection for all its surveys since March 2020. As a result, the mode of collection for collecting QLFS data changed to Computer-assisted Telephone Interviewing (CATI). Considering the changes in the survey mode of collection, comparisons with previous quarters should be made with caution. In addition, the QLFS is also designed to provide estimates at 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 1-digit level.

Table 13 indicates that an estimated 18,7% of South African jobs were created by tourism related industries during January-March 2022, and that was an increase of 6,3% (166 081) in total jobs created by the tourism related industries when compared to January-March 2021. Total employment however declined by -0.5% during January-March 2022 compared to January-March 2021.

Table 13: Tourism related industries employment: January-March 2022 compared to January-March 2021

Employment	JANUARY-MARCH 2022	JANUARY-MARCH 2021	Difference	% Growth
Total Tourism Related Industries Employment	2 791 190	2 625 109	166 081	6,3%
Total Employment	14 914 207	14 995 345	-81 137	-0,5%
Share of tourism related industries to total employment	18,7%	17,5%		

Source: Stats SA, Q1 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 January-March 2022 compared to January-March 2021. When tourism ratios are not applied, almost half of tourism related jobs are created by the retail industry (44,9%) followed by road passenger transport industry (24,1%) and food and beverages (13,1%) during January-March 2022.

Table 14: Tourism related industries share of employment: January-March 2022 compared to January-March 2021

Tourism Related Industries	JANUARY-MARCH 2022	JANUARY-MARCH 2021
Retail trade	44,9%	49,8%
Road Passenger transport	24,1%	23,8%

Food and Beverages	13,1%	13,0%
Accommodation for tourists	5,8%	4,0%
Cultural Services	4,4%	3,3%
Sporting and other recreation services	3,2%	2,1%
Railway passenger transport	2,4%	1,9%
Other (Water passenger transport services, Air Passenger Transport, Transport Equipment Rental and Travel agencies)	2,0%	2,1%
Total Tourism Related Industries Employment	100,0%	100,0%

Source: Stats SA, Q1 2022 Labour Force Survey data cuts

References:

1. Statistics South Africa May 31st 2022, Tourism and Migration report.
2. Statistics South Africa, 06 June 2022, Accommodation data cuts.
3. Statistics South Africa, March 2022, Food and Beverage data cuts.
4. Airports Company South Africa, March 2022 data cuts.
5. STR Global RSA Hotel review data March 2022
6. Statistics South Africa, March 2022, Quarterly Labour force Survey data