

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR APRIL 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 National State of Disaster. As part of the National State of Disaster, 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. 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.

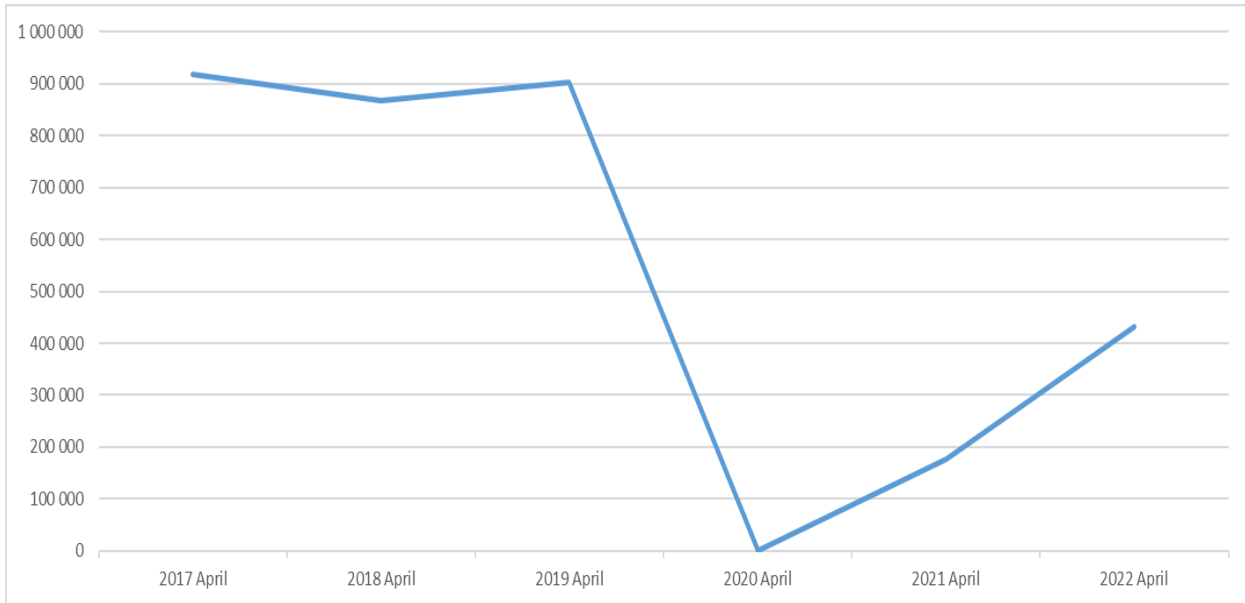
On the 05th April 2022 the National State of Disaster was lifted and most of the government COVID-19 regulations were removed. The regulations for travel to South Africa indicates that all travellers entering South Africa must provide proof of vaccination or a negative PCR test not older than 72 hours upon arrival. Statistics South Africa (Stats SA) has therefore published data on the number of tourists during April 2022, and this report provides a further analysis of the tourists that travelled to South Africa during April 2022. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for April 2022 compared to April 2021 is also provided in this report.

TREND ANALYSIS: APRIL 2017 – APRIL 2022

A total of 431 376 tourist arrivals was recorded in April 2022, which was an increase of 143,4% (254 125) compared to the same month in 2021. The increase experienced in April 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 April 2017 to April 2022. Tourist arrivals decreased from 919 084 in 2017 to 866 894 in 2018, which was a decrease of -5,7% (-52 190). Tourist arrivals increased from 866 894 in 2018 to 903 059 in 2019, which was an increase of 4,2% (36 165). There were zero tourists recorded during April 2020 since the country was under lockdown level 4 which prevented tourists from entering the country.

Figure 1: Total Tourist Arrivals: April 2017-April 2022



	Apr-17	Apr-18	Apr-19	Apr-20	Apr-21	Apr-22
Tourist Arrivals: April	919 084	866 894	903 059	0	177 251	431 376
Diff.	123 165	-52 190	36 165	-903 059	177 251	254 125
% Diff	15,5%	-5,7%	4,2%	-100,0%	*1/	143,4%

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

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

APRIL 2022 COMPARED TO APRIL 2021 BY REGION

Table 1 below indicates tourist arrivals by region for April 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 1 530,2% (4 820) followed by Europe (643,1%; 70 070) and North America (414,6%; 16 838). Africa also recorded an increase of 98,1% (154 061) and this region remains the main source of tourist arrivals to the country, accounting for 72,1% (311 087) of total tourist arrivals during April 2022.

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

Region	April 2022	April 2021	Diff	% Diff.
EUROPE	80 965	10 895	70 070	643,1%
NORTH AMERICA	20 899	4 061	16 838	414,6%
CENTRAL & SOUTH AMERICA	2 142	587	1 555	264,9%
AUSTRALASIA	5 135	315	4 820	1 530,2%
MIDDLE EAST	2 450	530	1 920	362,3%
ASIA	7 927	3 527	4 400	124,8%
TOTAL OVERSEAS	119 518	19 915	99 603	500,1%
AFRICA	311 087	157 026	154 061	98,1%
Unspecified	771	310	461	148,7%
GRAND TOTAL	431 376	177 251	254 125	143,4%

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

JANUARY-APRIL 2022 COMPARED TO JANUARY-APRIL 2021

Tourist arrivals figures by region for the period January-April 2022 compared to the same period in 2021 are indicated in table 2 below. Total tourist arrivals went up by 162,1% (914 746) for the period January-April 2022 compared the same period in 2021. Total tourist arrivals from the overseas market increased by 525,4% (325 210). Australasia (1 186,6%) recorded the highest increase followed by Europe (670,8%), North America (479,4%), Middle East (339,9%), Central and South America (256,0%) and Asia with an increase of 127,8%.

In Australasia, Australia recorded the highest increase in volume having an increase of 9 879 (1 261,7%) followed by New Zealand (1 440; 872,7%). The United Kingdom had recorded the highest increase in volume (87 772; 1 353,5%) in the Europe region. In North America, USA has recorded the highest increase in volume (43 700; 459,8%). Israel had recorded the highest increase in volume for the Middle East region with an additional 3 550 tourists compared to January-April 2021. In Central and South America, Brazil had recorded the highest increase in volume (2 283; 222,7%) for the period under review.

Tourist arrivals from Africa increased by 117,3% (588 089) during the same period under review. In terms of volume, the increase recorded from the continent was driven by an increase of (145 246; 105,8%) from Mozambique, followed by Lesotho (143 045; 153,6%) and Zimbabwe (136 433; 110,8%), refer to table 2 below.

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

Region	Jan-Apr 2022	Jan-Apr 2021	Diff	% Diff
EUROPE	273 914	35 535	238 379	670,8%
NORTH AMERICA	61 155	10 555	50 600	479,4%
CENTRAL & SOUTH AMERICA	6 486	1 822	4 664	256,0%
AUSTRALASIA	12 287	955	11 332	1 186,6%
MIDDLE EAST	7 426	1 688	5 738	339,9%
ASIA	25 837	11 340	14 497	127,8%
TOTAL OVERSEAS	387 105	61 895	325 210	525,4%
TOTAL AFRICA	1 089 400	501 311	588 089	117,3%
Unspecified	2 429	982	1 447	147,4%
GRAND TOTAL	1 478 934	564 188	914 746	162,1%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period April 2022 compared to April 2021. More than half of the top ten African source markets remained in their positions namely, Mozambique, Zimbabwe, Lesotho, Eswathini, Zambia and Malawi which ranked 1st, 2nd, 3rd, 4th, 7th, and 8th positions respectively during both periods. Botswana, Angola and Tanzania all moved up their positions in 2022 when compared to 2021. Namibia dropped from 5th position in 2021 to 6th position in 2022. Tanzania replaced DRC in the top 10 list in April 2022. All top ten countries recorded a positive growth with Angola recording the highest increase of 528,1% followed by Botswana (156,4%) and Lesotho (153,6%).

Table 2.1: South Africa's Top 10 African Source Markets: Jan-April 2022 compared to Jan-April 2021

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
Mozambique	1	282 537	1	137 291	105,8%
Zimbabwe	2	259 606	2	123 173	110,8%
Lesotho	3	236 189	3	93 144	153,6%
Eswatini	4	98 144	4	43 939	123,4%
Botswana	5	60 214	6	23 484	156,4%
Namibia	6	40 364	5	26 782	50,7%
Zambia	7	32 537	7	18 666	74,3%
Malawi	8	29 033	8	12 740	127,9%
Angola	9	8 530	14	1 358	528,1%
Tanzania	10	7 122	11	3196	122,8%

Source: Stats SA Tourism and Migration Report, April 2022

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing April 2022 with April 2021, all top 10 overseas markets recorded an increase in tourist arrivals. Germany and France were the only countries which ranked in the same positions, 2nd and 5th respectively during both periods. UK replaced USA as the main source market from overseas, recording a growth of 1 353,5%. Russian Federation, China and Pakistan were replaced by Australia, Belgium and Canada during the period under review. Australia moved from 19th position in 2021 to 8th position in 2022 while Canada moved from the 13th position in 2021 to the 10th position in April 2022.

Table 2.2: South Africa's Top 10 Overseas Source Markets: Jan-April 2022 compared to Jan-April 2021

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
UK	1	94 257	3	6 485	1 353,5%
Germany	2	56 779	2	6 710	746,2%
USA	3	53 205	1	9 505	459,8%
The Netherlands	4	25 034	7	2 709	824,1%
France	5	20 442	5	3 679	455,6%
India	6	11 274	4	4 322	160,9%
Switzerland	7	11 165	10	1 493	647,8%
Australia	8	10 662	19	783	1 261,7%
Belgium	9	9 302	11	1346	591,1%
Canada	10	7 950	13	1050	657,1%

source: Stats SA Tourism and Migration Report, April 2022

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

The next section of the report is about the performance of tourism related industries during April 2022 compared to April 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 April 2022, 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 2022 and April 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 accommodation, food and beverages and aviation industries for the period April 2022 and April 2021

APRIL 2022 Adjusted Level One until 5 April The National State of Disaster has been lifted	APRIL 2021 Adjusted Alert Level One
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.	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: APRIL 2022

ACCOMMODATION INDUSTRY INCOME: APRIL 2022 COMPARED TO APRIL 2021

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 April 2022 compared to April 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During April 2022, the total income (current prices) from the accommodation industry showed an increase of 53,4% compared to April 2021. Total income from all categories recorded an increase except caravan parks and camp sites with a decrease of -20,2%. Total income from hotels recorded the highest increase of about 68,4% moving from R1 191,1 million in April 2021 to R2 005,6 million in April 2022.

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

Type of Accommodation	April 2022				April 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Apr 2022 compared to Apr 2021
Hotels (R million)	R379,3	R803,0	R823,3	R2 005,6	R267,3	R505,1	R418,7	R1 191,1	68,4%
Caravan parks and camping sites (R million)	R0,4	R26,7	R1,3	R28,4	R0,8	R34,5	R0,3	R35,6	-20,2%
Guest houses and guest farms (R million)	R7,0	R75,7	R1,8	R84,5	R6,1	R53,9	R2,3	R62,3	35,6%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R72,0	R638,5	R37,7	R748,2	R61,1	R482,5	R36,1	R579,7	29,1%
Total Industry - (R million)	R458,7	R1 543,9	R864,1	R2 866,7	R335,3	R1 076,0	R457,4	R1 868,7	53,4%

Source: Stats SA: Accommodation data cuts, 20 June 2022

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 43,5% during April 2022. Most categories of accommodation showed an increase in income levels with hotels recording the highest increase of 59,0%; followed by guest houses and guest farms (40,4%) and other accommodation (32,3%). Caravan parks and camping sites which declined by -22,6%.

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

Type of Accommodation	April 2022 Accommodation only	April 2021 Accommodation only	% Change Apr 2022 compared to Apr 2021
Hotels (R million)	R803,0	R505,1	59,0%
Caravan parks and camping sites (R million)	R26,7	R34,5	-22,6%
Guest houses and guest farms (R million)	R75,7	R53,9	40,4%
Other accommodation (R million)	R638,5	R482,5	32,3%
Total Industry – (R million)	R1 543,9	R1 076,0	43,5%

Source: Stats SA: Accommodation data cuts, 20 June 2022

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) for January-April for the period 2021-2022 is provided in table 6 below. Income from accommodation showed an increase of 43,5% during April 2022 when compared to the same month in 2021.

Table 6: Year on Year Change in income from Accommodation

MONTH	2021	2022
January	-70,9%	65,5%
February	-75,1%	109,3%
March	-40,6%	76,8%
April	2 291,1%	43,5%

Source: Stats SA: Accommodation data cuts, 20 June 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: APRIL 2022 COMPARED TO APRIL 2021

Table 7 below indicates occupancy rates by accommodation type for April 2022 compared April 2021. The total accommodation occupancy rate in April 2022 was 31,4%, which was an increase compared to 26,6% recorded in April 2021. The occupancy rate for most of the accommodation establishments increased in April 2022 compared to the same month last year except for caravan parks and camping sites, which showed a decline moving from 31,1% in April 2021 to 27,7% in April 2022.

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

Category	January		February		March		April	
	2021	2022	2021	2022	2021	2022	2021	2022
Hotel	14,3%	27,6%	16,3%	34,1%	21,6%	37,5%	24,6%	33,8%
Caravan Parks and Camping Sites	24,8%	24,5%	25,6%	19,5%	29,1%	28,6%	31,1%	27,7%
Guest-Houses and Guest Farms	12,8%	17,3%	13,3%	25,5%	13,8%	18,8%	15,4%	15,8%
Other Accommodation	25,2%	28,4%	25%	29,3%	28,4%	35,7%	32,4%	33,4%
Total Accommodation	18,2%	26,6%	19,4%	30,6%	23,5%	34,4%	26,6%	31,4%

Source: Stats SA: Accommodation data cuts, 20 June 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 April 2022 compared to April 2021 is provided in table 8 below. It is important to note that the STR hotel data information for April 2022 and April 2021 is from a sample of 319 hotels that is drawn from a census/population of 427 hotels. There was an increase recorded in all hotel performance indicators in April 2022 compared to April 2021. Hotel occupancy rate increased by 25,8% in April 2022 compared to April 2021, moving from an occupancy rate of 39,0% in April 2021 to 49,0% in April 2022. The Average Daily Rate (ADR) for April 2022 was R1 264,6 which was an increase of 15,6% compared to R1 078,1 seen in April 2021. The Revenue Per available room also increased by 45,5%; from R420,1 in April 2021 compared to R611,4 in April 2022.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
April 2022	49,0%	25,8%	R1 264,6	15,6%	R611,4	45,5%	427	319
April 2021	39,0%		R1 078,1		R420,1			

Source: STR Hotel Data April 2022

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: APRIL 2022 COMPARED TO APRIL 2021 AT CONSTANT 2015 PRICES

The results in table 9 indicates that the total income for the food and beverages industry in April 2022 was about R4 025,4 million, which was an increase of 12,7% compared to R3 570,8 million in April 2021. All food and beverages industry categories showed an increase in income, with catering services having the highest increase of 21,6% followed by take-away and fast food outlets (13,0%) and restaurant and coffee shops (10,2%). *Please note food and beverages at constant prices 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: April 2022 compared to April 2021 at constant prices

Categories of Food and Beverages	April-22	April-21	% Change
Catering services (R million)	R593,9	R488,4	21,6%
Take-away and fast food outlets (R million)	R1 401,8	R1 240,0	13,0%
Restaurants and coffee shops (R million)	R2 029,7	R1 842,4	10,2%
Total Industry (R million)	R4 025,4	R3 570,8	12,7%

Source: Stats SA: Food and beverages data cuts, 20 June 2022

The monthly percentage change of income from the food and beverages industry for January-April 2022 compared to the same months in 2021 is provided in table 10 below. Income from food and beverages industry recorded an increase of 12,7% during April 2022 compared to the same month in 2021.

Table 10: Year on Year Change in income from food and beverage industry: April 2022 compared to April 2021

MONTH	2021	2022
January	-47,2%	46,8%
February	-35,5%	16,9%
March	-4,6%	14,4%
April	1 304,7%	12,7%

Source: Stats SA: April Food and beverages data cuts and report, 20 June 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: APRIL 2022 COMPARED TO APRIL 2021

Table 11 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during April 2022 compared to April 2021. Total passenger arrivals increased by 45,9%; from 883 259 in April 2021 to 1 288 354 in April 2022. International passengers showed the highest increase of 293,9% followed by regional (150,9%), unscheduled passengers (92,9%) and domestic (20,9%).

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

Arriving Passengers	Apr-22	Apr-21	% Change
International	293 227	74 440	293,9%
Regional	28 203	11 240	150,9%
Domestic	959 559	793 761	20,9%
Unscheduled	7 365	3 818	92,9%
Total	1 288 354	883 259	45,9%

Source: ACSAs data cuts, April 2022

PASSENGER DEPARTURE MOVEMENT: APRIL 2022 COMPARED TO APRIL 2021

Table 12 provides the total passenger departing from Airports Company South Africa (ACSA) airports during April 2022 compared to April 2021. Total departing passengers increased by 47,7%; from 886 617 in April 2021 to 1 309 522 in April 2022. The table further indicates that international passengers departing had the highest increase of 309,2% followed by regional (142,4%), unscheduled passengers (85,8%) and domestic (20,6%).

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

Departing Passengers	Apr-22	Apr-21	% Change
International	317 281	77 542	309,2%
Regional	28 097	11 592	142,4%
Domestic	956 892	793 579	20,6%
Unscheduled	7 252	3 904	85,8%
Total	1 309 522	886 617	47,7%

Source: ACSAs data cuts, April

2022

References:

1. Statistics South Africa June 28th 2021, 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, April 2022 data cuts.
5. STR Global RSA Hotel review data April 2022