

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR FEBRUARY 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.

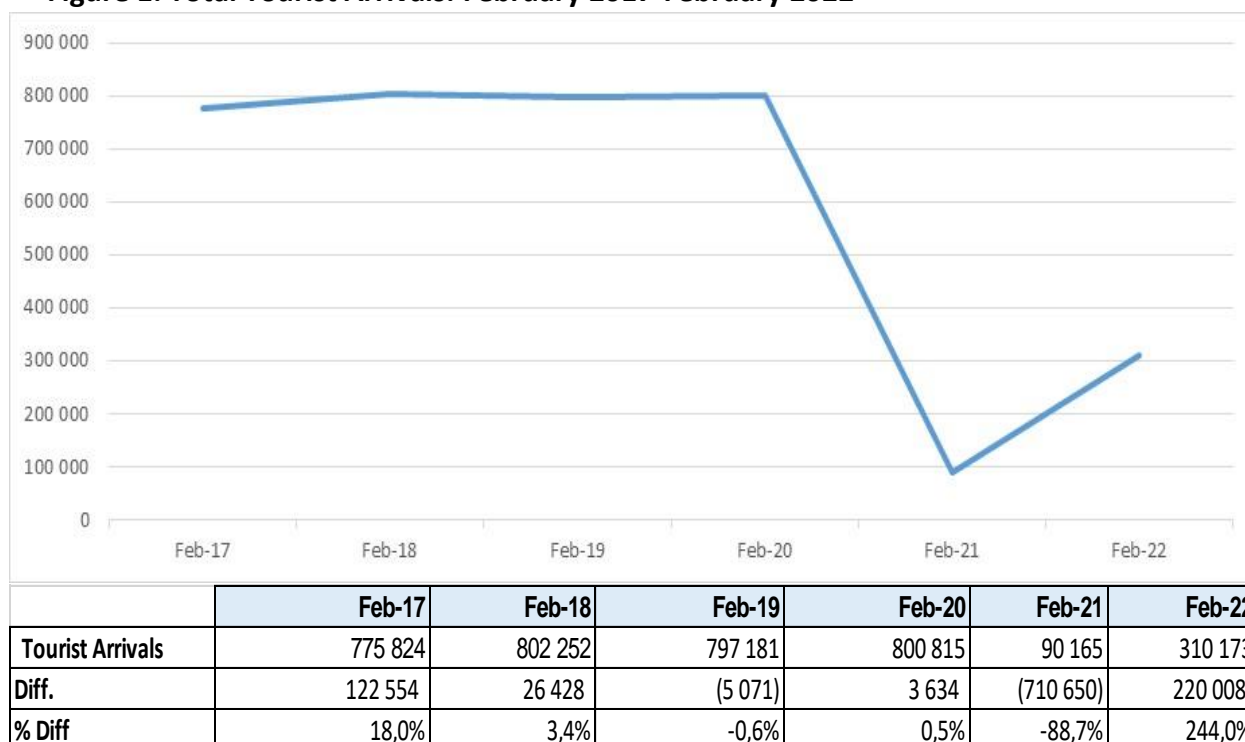
During February 2022, South Africa was under adjusted alert level 1 which allowed for international tourists to travel to the country subject to restrictions. These restrictions included that all travellers visiting the country will be expected to abide by the regulations which include mandatory wearing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

TREND ANALYSIS: FEBRUARY 2017 – FEBRUARY 2022

A total of 310 173 tourist arrivals was recorded in February 2022, which was an increase of 244,0% (220 008) compared to the same month in 2021. The increase experienced in February 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 February 2017 to February 2022. Tourist arrivals increased from 775 824 in 2017 to 802 252 in 2018, which was an increase of 3,4% (26 428). Tourist arrivals decreased from 802 252 in 2018 to 797 181 in 2019, which was a decrease of -0,6% (-5 071). However, tourist arrivals increased by 0,5% (3 634) in February 2020 compared to the same month in 2019. Comparing February 2021 with February 2020, a decline of -88,7% (-710 650) in tourist arrivals was seen.

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



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

FEBRUARY 2022 COMPARED TO FEBRUARY 2021 BY REGION

Table 1 below indicates tourist arrivals by region for February 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 1 132,5% (1 880) followed by Europe (1 017,8,4%; 65 171) and North America (715,8%; 10 164). Africa also recorded an increase of 172,2% (136 494) and this region remains the main source of tourist arrivals to the country, accounting for 69,6% (215 760) of total tourist arrivals during February 2022.

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

Region	February 2022	February 2021	Diff	% Diff.
EUROPE	71 574	6 403	65 171	1 017,8%
NORTH AMERICA	11 584	1 420	10 164	715,8%
CENTRAL & SOUTH AMERICA	1 235	341	894	262,2%
AUSTRALASIA	2 046	166	1 880	1 132,5%
MIDDLE EAST	1 590	206	1 384	671,8%
ASIA	5 870	2 209	3 661	165,7%
TOTAL OVERSEAS	93 899	10 745	83 154	773,9%
AFRICA	215 760	79 266	136 494	172,2%
Unspecified	514	154	360	233,8%
GRAND TOTAL	310 173	90 165	220 008	244,0%

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

JANUARY-FEBRUARY 2022 COMPARED TO JANUARY-FEBRUARY 2021

Tourist arrivals figures by region for the period January-February 2022 compared to the same period in 2021 are indicated in table 2 below. Total tourist arrivals went up by 200,0% (458 525) for the period January-February 2022 compared the same period in 2021. Total tourist arrivals from the overseas market increased by 549,2% (134 181). Australasia (842,7%) recorded the highest increase followed by Europe (689,5%), North America (474,6%), Middle East (327,1%), Central and South America (210,0%) and Asia with an increase of 160,1%.

In Australasia, Australia recorded the highest increase in volume having an increase of 2 951 (916,5%) followed by New Zealand (328; 529.0%). The United Kingdom had recorded the highest increase in volume (37 449; 1 374,8%) in the Europe region. In North America, USA has recorded the highest increase in volume (14 704; 476,6%). Israel had recorded the highest increase in volume for the Middle East region with an addition 1 198 tourists compared to January-February 2021. In Central and South America, Brazil had recorded the highest increase in volume (859: 207,5%) for the period under review.

Tourist arrivals from Africa increased by 158,3% (323 709) during the same period under review. In terms of volume, the increase recorded from the continent was driven by an increase of (106 727; 212,7%) from Mozambique, followed by Lesotho (86 611;215,9%) and Zimbabwe (49 911; 84,2%), refer to table 2.1 below.

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

Region	Jan-Feb 2022	Jan-Feb 2021	Diff	% Diff
EUROPE	119 102	15 085	104 017	689,5%
NORTH AMERICA	20 523	3 572	16 951	474,6%
CENTRAL & SOUTH AMERICA	2 300	742	1 558	210,0%
AUSTRALASIA	3 667	389	3 278	842,7%
MIDDLE EAST	2 413	565	1 848	327,1%
ASIA	10 608	4 079	6 529	160,1%
TOTAL OVERSEAS	158 613	24 432	134 181	549,2%
TOTAL AFRICA	528 200	204 491	323 709	158,3%
Unspecified	1 011	376	635	168,9%
GRAND TOTAL	687 824	229 299	458 525	200,0%

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

Table 2.1 below gives the rankings of the top ten African source markets for the period February 2022 compared to February 2021. All of the top ten African source markets moved their positions except for Eswatini, Zambia, Malawi and Nigeria which ranked 4th, 7th, 8th and 9th positions respectively during both periods. Mozambique, Lesotho, 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. Tanzania replaced DRC in the top 10 list in February 2022. All top ten countries recorded a positive growth with Malawi

recording the highest increase of 217,1% followed by Lesotho (215,9%) and Mozambique (212,7%).

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

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
Mozambique	1	156 904	2	50 177	212,7%
Lesotho	2	126 727	3	40 116	215,9%
Zimbabwe	3	109 179	1	59 268	84,2%
Eswatini	4	43 085	4	14 124	205,0%
Botswana	5	23 655	6	8 107	191,8%
Namibia	6	17 219	5	10 583	62,7%
Zambia	7	14 953	7	7 671	94,9%
Malawi	8	14 589	8	4 601	217,1%
Nigeria	9	3 116	9	1 945	60,2%
Tanzania	10	3 110	11	1309	137,6%

Source: Stats SA Tourism and Migration Report, February 2022

Table 2.2 shows the rankings of the top ten overseas source markets. Comparing February 2022 with February 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 except for Germany which ranked 2nd position during both periods. UK replaced USA as the main source market from overseas, recording a growth of 1374,8%. Russian Federation, China and Pakistan were replaced by Australia, Belgium and Canada during the period under review. Canada moved from the 13th position in 2021 to the 10th position in February 2022.

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

Country	Rank-2022	Tourist Arrivals 2022	Rank-2021	Tourist Arrivals 2021	% Change from 2021 to 2022
UK	1	40 173	3	2 724	1 374,8%
Germany	2	26 166	2	2 856	816,2%
USA	3	17 789	1	3 085	476,6%
The Netherlands	4	12 091	7	1 015	1 091,2%
France	5	7 813	4	1 698	360,1%
Switzerland	6	5 277	10	627	741,6%
India	7	4 653	5	1 693	174,8%
Belgium	8	3 771	11	576	554,7%
Australia	9	3 273	18	322	916,5%
Canada	10	2 734	13	487	461,4%

source: Stats SA Tourism and Migration Report, February 2022

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

The next section of the report is about the performance of tourism related industries during February 2022 compared to February 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 February 2022, South Africa was under adjusted level 1, which was from 01 October 2021-28 February 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 February 2022 and February 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 February 2022 and February 2021

Feb 2022 Adjusted Level One	Feb 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.	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 was prohibited.
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: FEBRUARY 2022

ACCOMMODATION INDUSTRY INCOME: FEBRUARY 2022 COMPARED TO FEBRUARY 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 February 2022 compared to February 2021. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During February 2022, the total income (current prices) from the accommodation industry showed an increase of 139,5% compared to February 2021. Total income from all categories recorded an increase except caravan parks and camp sites with a decrease of -7,2%. Total income from hotels recorded the highest increase of about 175.0% moving from R798,8 million in February 2021 to R2 196,8 million in February 2022.

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

Type of Accommodation	Feb 2022				Feb 2021				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Feb 2022 compared to Feb 2021
Hotels (R million)	R363,8	R729,3	R1 103,7	R2 196,8	R164,5	R306,3	R328,0	R798,8	175,0%
Caravan parks and camping sites (R million)	R0,3	R12,6	R0,0	R12,9	R0,0	R13,9	R0,0	R13,9	-7,2%
Guest houses and guest farms (R million)	R4,8	R103,1	R0,4	R108,3	R3,3	R43,2	R1,5	R48,0	125,6%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R75,5	R426,2	R45,9	R547,6	R37,8	R277,5	R20,4	R335,7	63,1%
Total Industry - (R million)	R444,4	R1 271,2	R1 150,0	R2 865,6	R205,6	R640,9	R349,9	R1 196,4	139,5%

Source: Stats SA: Accommodation data cuts, 19 April 2022

Table 4 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 98,3% during February 2022. All categories of accommodation showed an increase in income levels with guest houses and guest farms recording the highest increase of 138,7%; followed by hotels (138,1%) and other accommodation (53,6%) except for caravan parks and camping sites which declined by -9,4%.

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

Type of Accommodation	Feb 2022 Accommodation only	Feb 2021 Accommodation only	% Change Feb 2022 compared to Feb 2021
Hotels (R million)	R729,3	R306,3	138,1%
Caravan parks and camping sites (R million)	R12,6	R13,9	-9,4%
Guest houses and guest farms (R million)	R103,1	R43,2	138,7%
Other accommodation (R million)	R426,2	R277,5	53,6%
Total Industry – (R million)	R1 271,2	R640,9	98,3%

Source: Stats SA: Accommodation data cuts, 19 April 2022

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) for January-February for the period 2021-2022 is provided in table 5 below. Income from accommodation showed an increase of 98,3% during February 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%
February	-75,1%	98,3%

Source: Stats SA: Accommodation data cuts, 19 April 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: FEBRUARY 2022 COMPARED TO FEBRUARY 2021

Table 6 below indicates occupancy rates by accommodation type for February 2022 compared February 2021. The total accommodation occupancy rate in February 2022 was 30,9%, which was an increase compared to 19,4% recorded in February 2021. The occupancy rate for most of the accommodation establishments increased in February 2022 compared to the same month last year except for caravan parks and camping sites, which showed a decline moving from 25,6% in February 2021 to 20,1% in February 2022.

Table 6: Occupancy Rate: February 2022 compared to February 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	27,6	24,5	17,3	28,4	26,6
Feb-21	16,3%	25,6%	13,3%	25%	19,4%
Feb-22	35,5%	20,1%	22,5%	28,6%	30,9%

Source: Stats SA: Accommodation data cuts, 19 April 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 February 2022 compared to February 2021 is provided in table 7 below. It is important to note that the STR hotel data information for February 2022 and February 2021 is from a sample of 240 hotels that is drawn from a census/population of 422 hotels. There was an increase recorded in all hotel performance indicators in February 2022 compared to February 2021. Hotel occupancy rate increased by 88,0% in February 2022 compared to February 2021, moving from an occupancy rate of 28,0% in February 2021 to 52,6% in February 2022. The Average Daily Rate (ADR) for February 2022 was R1 269,6 which was an increase of 24,8% compared to R1 017,1 seen in February 2021. The Revenue Per available room also increased by 134,7%; from R284,5 in February 2021 compared to R667,6 in February 2022.

Table 7: South Africa Hotel Performance: February 2021 compared to February 2022

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
February 2022	52,6	88,0%	1 269,6	24,8%	667,6	134,7%	422	240
February 2021	28,0		1 017,1		284,5			

Source: STR Hotel Data FEBRUARY 2022

2.2 FOOD AND BEVERAGES INDUSTRY

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

The results in table 8 indicates that the total income for the food and beverages industry at current prices in February 2022 was about R4 995,7 million, which was an increase of 24,3% compared to R4 018,3 million in February 2021. All food and beverages industry categories showed an increase in income, with catering services having the highest increase of 57,0% followed by take-away and fast food outlets (27,6%) and restaurant and coffee shops (14,0%).

Table 8: Total income by type of food and beverage industry: February 2022 compared to February 2021 at current prices

Categories of Food and Beverages	February-22	February-21	% Change
Catering services (R million)	R836,7	R532,9	57,0%
Take-away and fast food outlets (R million)	R1 743,4	R1 366,5	27,6%
Restaurants and coffee shops (R million)	R2 415,6	R2 118,9	14,0%
Total Industry (R million)	R4 995,7	R4 018,3	24,3%

Source: Stats SA: Food and beverages data cuts, 19 April 2022

The monthly percentage change of income from the food and beverages industry for January-February 2022 compared to the same months in 2021 at current prices is provided in table 9 below. Income from food and beverages industry recorded an increase of 24,3% during February 2022 compared to the same month in 2021.

Table 9: Year on Year Change in income from food and beverage industry: February 2022 compared to February 2021 at current prices

MONTH	2021	2022
January	-46,5%	54,7%
February	-35,1%	24,3%

Source: Stats SA: February Food and beverages data cuts and report, 19 April 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: FEBRUARY 2022 COMPARED TO FEBRUARY 2021

Table 10 shows the total passenger arrivals at Airports Company South Africa (ACSA) airports during February 2022 compared to February 2021. Total passenger arrivals increased by 113,8%; from 487 610 in February 2021 to 1 042 436 in February 2022. International passengers showed the highest increase of 353,6% followed by regional (182,8%), domestic (88,6%) and unscheduled passengers (57,8%).

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

Arriving Passengers	Feb-22	Feb-21	% Change
International	201 303	44 376	353,6%
Regional	17 498	6 187	182,8%
Domestic	819 323	434 315	88,6%
Unscheduled	4 312	2,732	57,8%
Total	1 042 436	487,610	113,8%

Source: ACSAs data cuts, February 2022

PASSENGER DEPARTURE MOVEMENT: FEBRUARY 2022 COMPARED TO FEBRUARY 2021

Table 11 provides the total passenger departing from Airports Company South Africa (ACSA) airports during February 2022 compared to February 2021. Total departing passengers increased by 111,1%; from 491 803 in February 2021 to 1 038 332 in February 2022. The table further indicates that international passengers departing had the highest increase of 314,5% followed by regional (205,8%), domestic (88,0%) and unscheduled passengers (42,4%).

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

Departing Passengers	Feb-22	Feb-21	% Change
International	198 158	47 811	314,5%
Regional	17 349	5 673	205,8%
Domestic	818 483	435 270	88,0%
Unscheduled	4 342	3 049	42,4%
Total	1 038 332	491 803	111,1%

Source: ACSAs data cuts, February 2022

References:

1. Statistics South Africa April 26th 2021, Tourism and Migration report.
2. Statistics South Africa, February 2022, Accommodation data cuts.
3. Statistics South Africa, February 2022, Food and Beverage data cuts.
4. Airports Company South Africa, February 2022 data cuts.
5. STR Global RSA Hotel review data February 2022