

Angola & DRC July 2022

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The Growth of Tourism in Africa

The term tourism is defined as a travel related activity. In other words, tourism is the movement of people from one point to another, whether inside or outside a country, for specific purposes, but most often linked to entertainment.

According to the United Nations World Tourism Organisation (UNWTO,2022), Africa is rich in immense natural and cultural resources, and the diversification of the economy through tourism will be key to building resilience against external shocks and so build economic stability and greater food security. Domestic and regional intra and inter tourism are valuable sources of income and can boost infrastructures.

The UNWTO further states that Africa is endowed with 70% of arable land and agriculture is one of the most important economic sectors in the continent. To be sure, there are many challenges in transforming the sector, to make it more sustainable and to secure food access and distribution. But we have good reason to be optimistic about the future.

Africa is home to the fastest growing urban populations on Earth and its growth is being driven by a buoyant youth possessing incredible talent and ingenuity. Moreover, tourism is returning across Africa, and our sector has the power to deliver positive change and inspire transformation.

This report seeks to analyze travel trends between South Africa and two Central African countries namely Angola and the Democratic Republic of Congo (DRC).

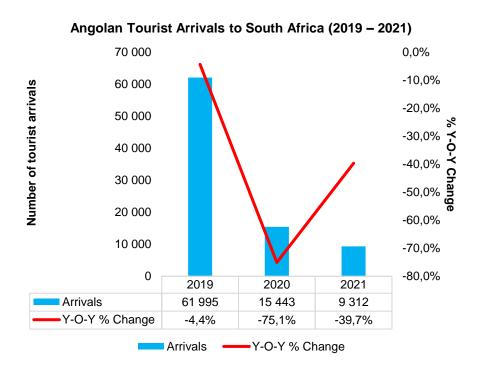




Angolan Travel Trends in South Africa

According to South African Tourism's latest tourism sentiment index report, the emotion attached to South Africa as a tourism destination is that of joy, despite the recent COVID-19 pandemic being a challenging period for the sector. The discovery of the Omicron COVID-19 variant and the subsequent restrictions placed on travel to and from South Africa by source markets presented further challenges for the destination. However, despite it all, South Africa has continued to receive travelers from this market.

The table reflects the Angolan tourist arrivals into South Africa between 2019 to 2021. Over the period under review, the highest number of tourist arrivals was seen in 2019, however fluctuating declines have been seen over the period with 2020 seeing a drop of (-75%) in tourist arrivals.







The Angolan Traveller to South Africa (2019 – 2021)

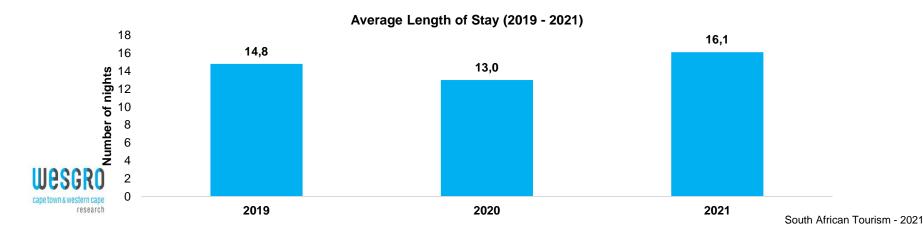
- Over the years under review holiday, visiting friends & relatives (VFR), and medical treatment were the top reasons for Angolan travellers to visit South Africa.
- In terms of accommodation, Angolan travellers preferred staying with friends and family, followed by hotels and guest houses. Over the review period, 2021 held the highest average length of stay in the country with 16,1 nights recorded.

Top Reasons For Travel

2019	2020	2021
Holiday - 39,2%	Holiday - 25,6%	Holiday - 30,2%
VFR - 21,4%	VFR - 21,3%	VFR - 28,7%
Medical - 8,7%	Medical - 10,6%	Medical - 8,4%

Accommodation Usage

2019	2020	2021
Friends & Family - 332 034	Friends & Family - 71 463	Friends & Family - 67 351
Self Catering - 148 188	Hotels - 42 345	Hotels - 21 332
Hotels - 143 219	Guest House - 25 046	Guest House - 14 864



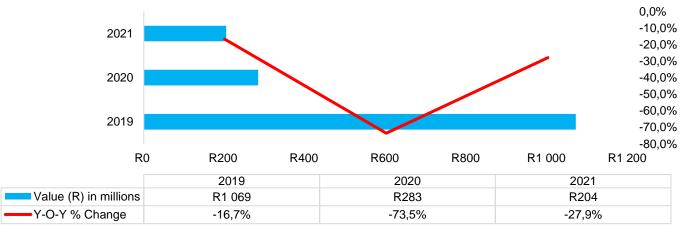
The Angolan Traveller to South Africa (2019 – 2021)

- Angolan tourists are typically between the ages of 25 30 and 35 40 years as tabled below. Since 2021, the numbers have since changed a bit with travelers aged 41–50-years held the highest travel share with (21,9%).
- Over the period (2019 2021), the highest Total Foreign Direct Spend (TFDS) was recorded in 2019 (R1 069 million) a slight decline of -16,7% as compared to 2018's value of R1 283 million.

Age of Respondents

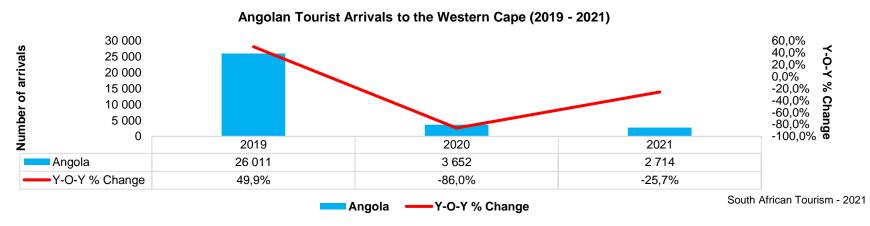
2019	2020	2021
35 - 40 = 25,2%	25 - 30 = 19,5%	41 - 50 = 21,9%
25 - 30 = 17,1%	35 - 40 = 18,3%	35 - 40 = 20,5%
31 - 34 = 16,0%	31 - 34 = 13,3%	25 - 34 = 17,2%

Angolan Tourists Total Foreign Direct Spend in South Africa (2019 - 2021)





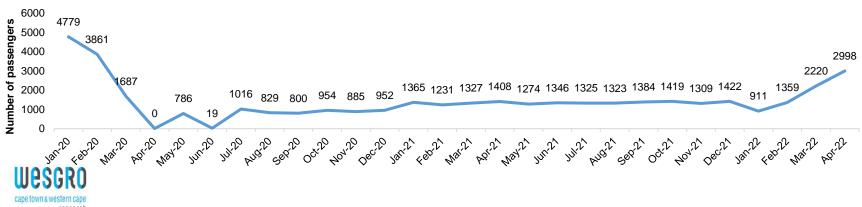
The Angolan Tourist to the Western Cape (2019-2021)



During the challenging nationwide lockdown which commenced on the 27th March 2020, the tourism and hospitality sectors have been the hardest hit throughout Africa. However, the announcement of business continuity and ease in travel restrictions brought much hope for the Western Cape economy. The graph above reflects Angolan tourist arrivals while the second graph is based on all passengers who travelled from Angola irrespective of the country of residence.

Angolan passenger movement plummeted to zero in April 2020 and then started picking up in May 2020 with 786 passengers travelling via Cape Town International Airport. When observing the graph below there has been a steady upward trend between December 2021 and April 2022.

Angolan Passenger Movement Through Cape Town International Airport

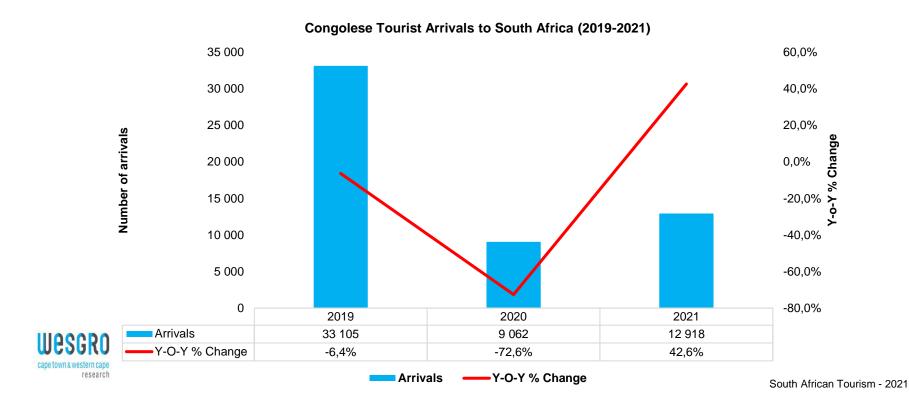




Democratic Republic of Congo (DRC) Travel Trends in South Africa

As the second-largest country on the African continent, the Democratic Republic of the Congo (DRC) is emerging as a stable and promising leader in Africa, with improved security, a growing economy, and a commitment to democratic governance.

Africa accounted for 83,1% of all international tourism into SA in 2021 and is South Africa's largest tourism market. The table below shows the Congolese (DRC) tourist arrivals into South Africa for the period 2019 –2021.



The DRC Traveller to South Africa (2019 – 2021)

- Congolese travellers to South Africa predominantly visit their friends and relatives (VFR), and for holiday purposes. A big
 part of traveling includes accommodation and among all the different types such as hotels, guest houses, backpackers and
 all other formal accommodation, Congolese travelers prefer staying with their friends and family as tabled below.
- Over the period under review the average length of stay has been on a decline with 2021 seeing an average of 23,3 nights recorded as compared to 31,2 nights recorded in 2019.

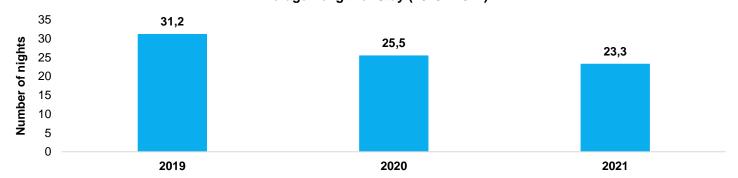
Top Reasons For Travel

2019	2020	2021
VFR - 35,4%	VFR - 34,1%	VFR - 47,0%
Holiday - 16,4%	Holiday - 18,3%	Holiday - 19,4%
Business - 9,1%	MICE - 11,6%	MICE - 7,1%

Accommodation Usage

2019	2020	2021
Friends & Family - 433 167	Friends & Family - 102 913	Friends & Family - 127 951
Backpacker - 138 798	Self Catering - 35 170	Self Catering - 21 311
Hotels - 60 208	Guest House - 19 503	Hotels - 16 500

Average Length of Stay (2019 - 2021)





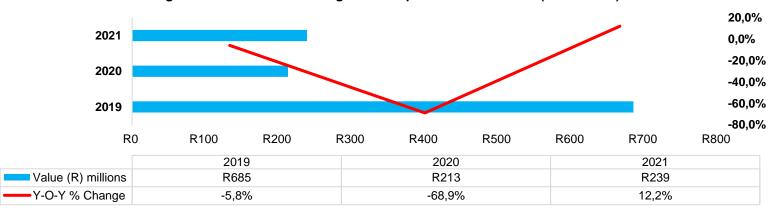
The DRC Traveller to South Africa (2019 – 2021)

- Travellers from the DRC to South Africa are generally aged between 25 –50 years. In 2021 the highest share of travelers was from the 41 50 age group.
- The Foreign Direct Spend (TFDS) value reached over R680 million in 2019 and a decline of -68,9% was seen in 2020. However, in 2021 numbers have since changed with a 12,2% increase in value being spent by Congolese travelers to South Africa.

Age of Respondents

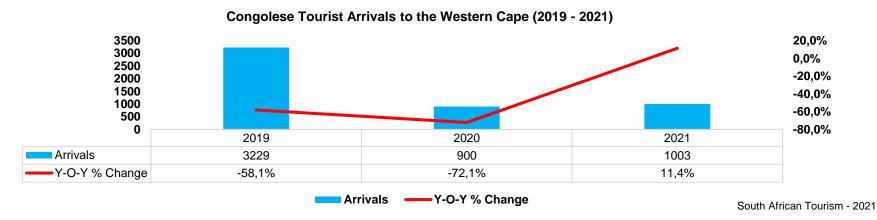
2019	2020	2021
35 - 40 = 19,8%	41 - 50 = 19,3%	41 - 50 = 24,3%
41 - 50 = 19,7%	35 - 40 = 11,4%	35 - 40 = 15,2%
25 - 30 = 14,4%	51 - 60 = 11,1%	25 - 30 = 14,7%

Congolese Tourists Total Foreign Direct Spend in South Africa (2019 - 2021)



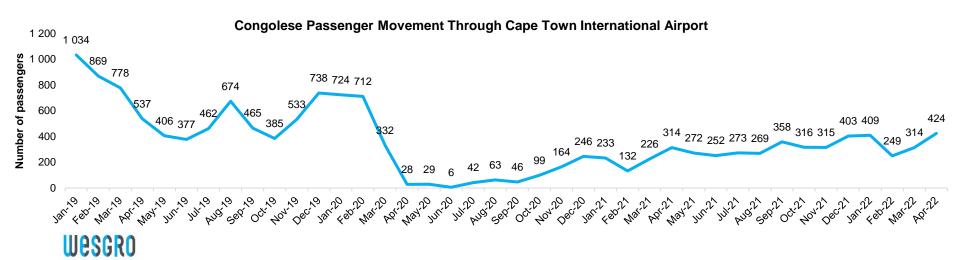


The DRC Tourist to the Western Cape (2019-2021)



Both international and domestic tourism in South Africa were extremely affected by the travel restrictions imposed due to the Covid- 19 regulations in 2020. The first graph as previously mentioned reflects Congolese tourist arrivals while the second graph is based on all passengers who travelled from Congo irrespective of the country of residence.

Passenger movement from the DRC dropped substantially between January – April 2020. A slow growth and recovery has since been seen moving from only 6 passengers in June 2020 to 252 in June 2021. An upward steady growth can be seen into 2022, reflecting a consistent month-to-month increase in Congolese passengers between February and April.



Key Findings

Tourism was one of the sectors most affected by the COVID-19 pandemic, impacting economies, livelihoods, public services and opportunities on all continents.

After the unprecedented drop in 2020 and 2021, international tourism is expected to continue its gradual recovery in 2022 both in South Africa and specifically in the Western Cape. According to the tourism sentiment index (2022), Knysna (19th) was among the Top 20 destinations in the world; followed by Stellenbosch (23rd), Hermanus (41st), Cape Town (54th) and Pretoria (73rd).

The trends seen in the report show that Angola had a higher share of arrivals coming into South Africa over the three-year period 2019 – 2021 than the DRC. In total there were (86 750) arrivals from Angola as compared to 55 085 that were from the DRC. It was the same for the Western Cape with total arrivals from Angola being (32 377) and (5 132) from the DRC.

Between the two countries (Angola & DRC) – holiday, visiting friends & relatives (VFR), meetings, incentives, conferences and events (MICE), and medical were the top reasons for travel. The age group of Angolan tourists who arrived in the country were typically between 25 - 30 and 35 - 40 years whereas Congolese were generally aged between 35 - 50 years.

International tourism is experiencing a positive start to 2022 with an increased number of destinations around the world easing travel restrictions. International tourist arrivals have more than doubled compared to last year and Africa has registered a growth of 51% in early 2022 compared to 2021, though numbers are still way below pre-pandemic levels of 2019 according data released by the UNWTO.



References

- 1. South African Tourism
- 2. OAG Airline Traffic Analyzer
- 3. Organisation for Economic Co-operation and Development (OECD)
- 4. United Nations World Tourism Organisation (UNWTO)



