tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM QUARTERLY PERFORMANCE REPORT

1st EDITION: JANUARY-MARCH 2021

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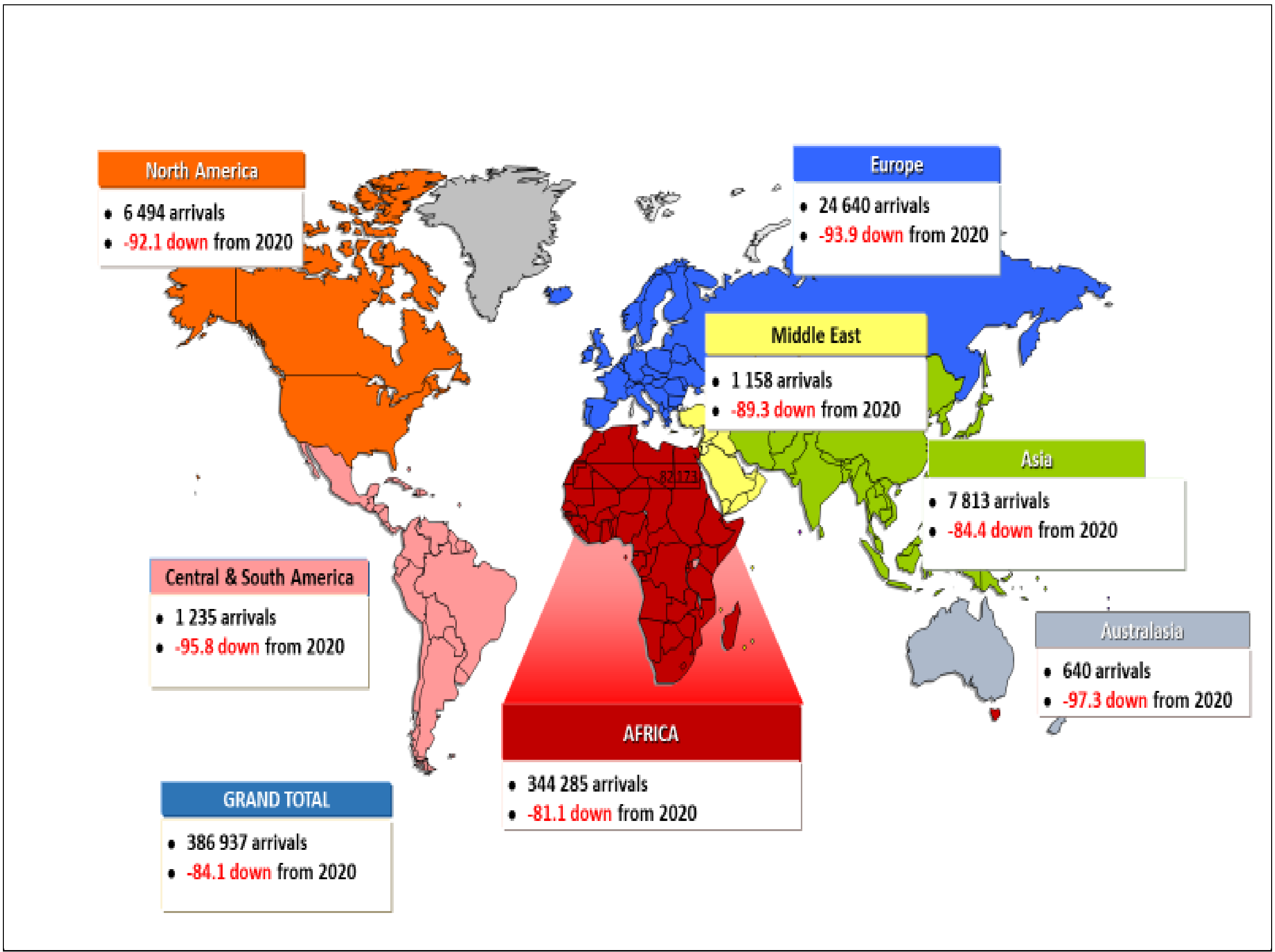
INTRODUCTION

The tourism quarterly performance report provides an analysis of tourist arrivals and tourism related industries for the period January-March 2021 compared to January-March 2020. The report also provides an analysis of the impact of coronavirus (COVID-19) on the tourism sector in the last quarter of 2020/21 financial year based on secondary data sources. 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, government adopted a risk adjustment strategy that aimed at increasing the economic activity while putting measures in place to reduce the transmission of the coronavirus. As part of this strategy, five (5) coronavirus alert levels were introduced, which indicated the different sectors that can operate under these levels. Under levels two-five, the risk adjustment strategy prevented international tourists from entering the borders of South Africa, which included the months of April-September 2020. South Africa was under adjusted level three from 29 December 2020 to 28 February 2021 and moved to adjusted alert level 1 in March 2021. South Africa was therefore under lockdown adjusted alert level three and level one during January –March 2021 period, for which allowed international tourists to travel to the country subject to restrictions put in place. These restrictions stipulated 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 to March 2021. Thus, this report provides an analysis of all tourists during January to March 2021 as well as the performance of key related tourism industries namely; accommodation, food and beverages, and aviation for January-March 2021 period compared to the same period in 2020. Global tourism performance for the period January-March 2021 compared to January-March 2020 is also included in the report.

SECTION 1: SOUTH AFRICA TOURIST ARRIVALS PERFORMANCE: JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

Total tourist arrivals went down by -84,1% for the period January-March 2021 compared the same period in 2020. This was a decline from a total of 2 429 177 tourist arrivals during the first three months of 2020 to 386 937(-2 042 240) during the same period in 2021. Australasia (-97.3%) recorded the highest decrease followed by Central and South America (-95.8%), Europe (-93.9%), North America (-92.1%), Middle East (-89.3%) and Asia with a decrease of -84.4%. Tourist arrivals from Africa decreased by -81.1%, from a total of 1 825 354 during January-March 2020 to a total of 344 288 during January-March 2021.

Figure 1: Total Tourist Arrivals by Region January-March 2021 vs. January-March 2020



Source: Stats SA, Tourism and Migration: March 2021 and data cuts.

SOUTH AFRICA TOURIST ARRIVALS

PERFORMANCE: JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020 CONTINUED

Further analysis indicates that the declining growth recorded in Australasia (-97.3%) was driven by Australia with a decline of -97.3% (-19 310) followed by New Zealand with -97.1% (-3 535). All countries in the Europe region had experienced a decline in tourist arrivals. The decline in Central and South America was driven by a decrease of -98.4% (-4 704) from Argentina, followed by Brazil with a decline of -96.3% in tourist arrivals. In the Middle East region, Israel experienced the highest drop in volume of -4 781 (-90.4 %), followed by Saudi Arabia with -2 966 (-96.1%). Tourist arrivals from Africa decreased by -81.1% (-1 481 069) during the same period under review. In terms of volume, the decrease recorded from the African continent was driven by a drop-in number of tourists of -493 676 (-84.7%) from Zimbabwe, followed by Lesotho (-350 259/ -84.7%) and Mozambique (-252 256/ -73.1%). The decline in South Africa's tourist arrivals from all regions was due to, amongst others, the impact of COVID-19 pandemic. The effect of this pandemic can also be seen in South Africa's top 10 overseas and African markets tourist arrivals, which are presented in tables 2 and 3 below.

Table 1: Total Tourist Arrivals by Region January-March 2021 vs. January-March 2020

REGION	JANUARY-MARCH 2020	JANUARY-MARCH 2021	Diff	% Diff
EUROPE	404 912	24 640	-380 272	-93,9%
NORTH AMERICA	82 173	6 494	-75 679	-92,1%
CENTRAL & SOUTH AMERICA	29 361	1 235	-28 126	-95,8%
AUSTRALASIA	23 520	640	-22 880	-97,3%
MIDDLE EAST	10 859	1 158	-9 701	-89,3%
ASIA	50 003	7 813	-42 190	-84,4%
TOTAL OVERSEAS	600 828	41 980	-558 848	-93,0%
TOTAL AFRICA	1 825 354	344 285	-1 481 069	-81,1%
Unspecified	2 995	672	-2 323	-77,6%
GRAND TOTAL	2 429 177	386 937	-2 042 240	-84,1%

Source: Stats SA: Tourism and Migration report: March 2021 and data cuts

Table 2 below gives the rankings of the top ten African source markets for the period January-March 2021 compared to January-March 2020. Most of the top ten African source markets moved their positions during the period under review except for Eswatini, which ranked in 4th position during both periods. Mozambique, Namibia, Zambia, Nigeria and the Democratic Republic of Congo (DRC) all moved up their positions in 2021. Nigeria replaced Angola moving from the 11th position to 9th position in Jan-March 2021, and the DRC replaced Tanzania improving its 12th position by moving to 10th position in 2021. Zimbabwe dropped from the 1st position in 2020 to 2nd position in 2021, and Lesotho moved down from 2nd position to 3rd position. Botswana dropped from 5th position in 2020 to 6th position as well as Malawi from 6th position to 8th position. All of the top ten countries recorded a decline, with Botswana experiencing the highest decrease of -87,3% followed by Eswatini (-84.8%), Lesotho (-84,7%) and Zimbabwe (-84,7%).

Table 2: South Africa's Top 10 African Source Markets: January-March 2021 vs. January-March 2020

COUNTRY	Rank: JANUARY-MARCH2021	Tourist arrivals JANUARY-MARCH2021	Rank: JANUARY-MARCH2020	Tourist arrivals JANUARY-MARCH2020	% Diff
Mozambique	1	92 770	3	345 026	-73,1%
Zimbabwe	2	89 018	1	582 694	-84,7%
Lesotho	3	63 465	2	413 724	-84,7%
Eswatini	4	28 649	4	188 948	-84,8%
Namibia	5	18 179	7	36 098	-49,6%
Botswana	6	14 891	5	117 099	-87,3%
Zambia	7	13 136	8	31 659	-58,5%

COUNTRY	Rank: JANUARY-MARCH2021	Tourist arrivals JANUARY-MARCH2021	Rank: JANUARY-MARCH2020	Tourist arrivals JANUARY-MARCH2020	% Diff
Malawi	8	8 743	6	43 325	-79,8%
Nigeria	9	2 785	11	8183	-66,0%
DRC	10	2 525	12	6352	-60,2%

Source: Stats SA: Tourism and Migration report: June 2021 and data cuts.

Table 3 shows the rankings of the top ten overseas source markets. Comparing January-March 2021 with January-March 2020, all of the top 10 overseas markets recorded a decrease in tourist arrivals. Most of the top ten overseas source markets moved their positions for the period under review, except for Germany and Switzerland, which maintained their original positions, i.e. 2nd and 10th positions respectively. USA with a decline of -91,3% replaced UK as the main source market from overseas. During January-March 2021 period, Brazil, Australia and Canada were replaced by Russian Federation, Pakistan and China in the top 10 list.

Table 3: South Africa's Top 10 Overseas Source Markets: January-March 2021 vs. January-March 2020

COUNTRY	Rank: JANUARY-MARCH 2021	Tourist arrivals JANUARY-MARCH 2021	Rank: JANUARY-MARCH 2020	Tourist arrivals JANUARY-MARCH 2020	% Diff
USA	1	5 742	3	66 016	-91,3%
Germany	2	4 938	2	98 333	-95,0%
UK	3	4 436	1	119 899	-96,3%
India	4	3 121	8	17 113	-81,8%
France	5	2 591	4	37 470	-93,1%
Russian Federation	6	2 083	20	5392	-61,4%
The Netherlands	7	1 700	5	32 030	-94,7%
China	8	1 388	12	11 516	-87,9%
Pakistan	9	1 341	29	3358	-60,1%
Switzerland	10	1 058	10	13 573	-92,2%

Source: Stats SA: Tourism and Migration report: March 2021 and data cuts

SECTION 2: PERFORMANCE OF SOUTH AFRICA'S TOURISM RELATED INDUSTRIES

IMPACT OF CORONAVIRUS (COVID-19) ON THE PERFORMANCE OF TOURISM RELATED INDUSTRIES

On 11 March 2020, the World Health Organisation (WHO) 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. 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 strategy, five (5) coronavirus alert levels were introduced, which indicated the different restrictions put in place and sectors that can operate under these levels. During January-March

2021, the country was under lockdown adjusted level three and level one lockdown restrictions. Figure 2 below provides a summary of the different levels of the lockdown regulations during January-March 2021 for the accommodation, food and beverage and aviation industries. The performance of the tourism related industries therefore should be viewed within the context of South Africa's COVID-19 lockdown regulations that were effective for the different lockdown restriction levels. ***Note***: *More information on the regulations can be sourced from the website: www.gov.za/coronavirus.*

Figure 2: South Africa COVID-19 regulations for the accommodation, food and beverages and aviation industries

Adjusted Level 3 29 December 2020-28 Feb 2021	Adjusted alert level 1 1 March 2021 to 30 May 2021.
Accommodation	
Adjusted Level 3	**Level 1**
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	
Adjusted Level 3	**Level 1**
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	
Adjusted Level 3	**Level 1**
Domestic air travel allowed. International travel allowed.	Domestic air travel allowed. International travel allowed as of 01 October 2020.

Source: Infographic created using information from https://www.gov.za/coronavirus

2.1 ACCOMMODATION INDUSTRY

2.1.1 ACCOMMODATION INDUSTRY INCOME: JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

The total income from the accommodation industry is provided in table 4 below. The total income from the accommodation industry showed a decline of -65,5%, from an amount of R11 151,5 million in Jan-Mar 2020 to R3 842,20 million in Jan-Mar 2021. Compared to the same quarter in 2020, all categories of accommodation experienced a decline in income. Hotels had the highest decline (-68,6%), followed by other accommodation (-55,9%), guest houses and guest farms (-42.2%) and caravan parks and camping sites (-37,6%). Other category includes lodges, bed-and-breakfast, self-catering and 'other' establishments not classified.

Table 4: Income from accommodation (current prices: January-March 2021 compared to January-March 2020

Type of Accommodation	Jan-Mar 21				Jan-Mar 2020				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Jan-Mar 2021 compared to Jan-Mar 2020
Hotels (R million)	R562,1	R1 194,7	R1 004,2	R2 761,0	R1 506,4	R3 847,8	R3 449,2	R8 803,4	-68,6%
Caravan parks and camping sites (R million)	R0,2	R37,4	R0,3	R37,9	R1,7	R57,3	R1,7	R60,7	-37,6%
Guest houses and guest farms (R million)	R18,2	R119,6	R7,8	R145,6	R26,6	R212,3	R13,2	R252,1	-42,2%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R106,4	R705,0	R86,3	R897,7	R223,0	R1 648,1	R164,2	R2 035,3	-55,9%
Total Industry - (R million)	R686,9	R2 056,7	R1 098,6	R3 842,2	R1 757,7	R5 765,5	R3 628,3	R11 151,5	-65,5%

Source: Stats SA: Accommodation data cuts, 24th May 2021

2.1.2 Income from Accommodation (excluding restaurants, bar sales and other income): January-March 2021 compared to January-March 2020

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went down by -64.3% during the same period under review. All categories of accommodation recorded a decline in income levels with hotels recording the highest decline of -69,0%; followed by other accommodation (-57,2%); guest houses and guest farms (-43,7%) and caravan parks and camping sites (-34,7%).

Table 5: Income from accommodation only: January-March 2021 compared to January-March 2020

Type of Accommodation	JANUARY-MARCH 2021 Accommodation only	JANUARY-MARCH 2020 Accommodation only	% Change JANUARY-MARCH 2021 compared to JANUARY-MARCH 2020
Hotels (R million)	R1 194,7	R3 847,8	-69,0%
Caravan parks and camping sites (R million)	R37,4	R57,3	-34,7%
Guest houses and guest farms (R million)	R119,6	R212,3	-43,7%
Other accommodation (R million)	R705,0	R1 648,1	-57,2%
Total Industry (R million)	R2 056,7	R5 765,5	-64,3%

Source: Stats SA: Accommodation data cuts, 24th May 2021

The percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) from January-March 2021 is provided in table 6 below. Income from accommodation decreased by -71,2%, -74.1% and -35.9% during January, February and March 2021 respectively compared to the same months in 2020. Although the income from accommodation continued to decrease over the months, the March 2021 decline was the lowest and this could be attributed to the easing of lockdown regulations, whereby South Africa moved to level one lockdown restrictions from 01st March 2021.

Table 6: Year on Year Change in income from Accommodation

MONTH	2020	2021
January	4,7%	-71,2%
February	8,1%	-74,1%
March	-41,7%	-35,9%

Source: Stats SA: Accommodation data cuts, 24th May 2021

2.1.3 ACCOMMODATION INDUSTRY OCCUPANCY RATE: JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

Table 7 shows occupancy rates by accommodation type from January-March 2021 compared to January-March 2020. The occupancy rate of all accommodation establishments declined during the months of January, February and March 2021 compared to the same months in 2020 with an exception of a slight increase in other accommodation category during March 2021 as occupancy rate slightly improved from 32,9% in March 2020 to 33,0% in March 2021. Despite low occupancy rate over the months, there was an improvement recorded in March 2021 (25.5%) occupancy rate compared to February (20.6%) and January 2021 (18.5%).

Table 7: Occupancy Rate (%): January-March 2021 compared to January-March 2020

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jan-21	14,8%	19,4%	15,1%	28,7%	18,5%
Jan-20	46,0%	26,3%	39,1%	46,8%	44,7%
Feb-21	17,9%	19,6%	15,8%	28,6%	20,6%
Feb-20	53,9%	25,6%	37,9%	48,0%	49,8%
Mar-21	23,5%	25,1%	16,3%	33,0%	25,5%
Mar-20	30,5%	25,3%	25,1%	32,9%	30,4%

Source: Stats SA: Tourist Accommodation data cuts, 24th May 2021

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 Jan-March 2021 compared to Jan-March 2020 is provided in table 8 below. It is important to note that the STR hotel data and information for the period Jan-March 2021 and Jan-March 2020 is from a sample of 210 hotels that is drawn from a census/population of 363 hotels.

According to the STR Global data, there was a decline recorded in all hotel performance indicators during Jan-March 2021 compared to Jan-March 2020. The hotel occupancy rate declined by -48,1%, from an occupancy rate of 53,4% in Jan-March 2020 to 27,7% in Jan-March 2021. The Average Daily Rate (ADR) for Jan-March 2021 was R1 045,7 which was a decline of -25,8% compared to R1 408,4 recorded in Jan-March 2020. The Revenue Per available room also decreased by -61,5%, dropping from R752,0 in Jan-March 2020 to R289,9 in Jan-March 2021.

Table 8: South Africa Hotel Performance: Jan-March 2021 compared to Jan-March 2020

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
Jan-Marc-21	27,7%	-48,1%	R1 045,7	-25,8%	R289,9	-61,5%	363	210
Jan-March-20	53,4%		R1 408,4		R752,0			

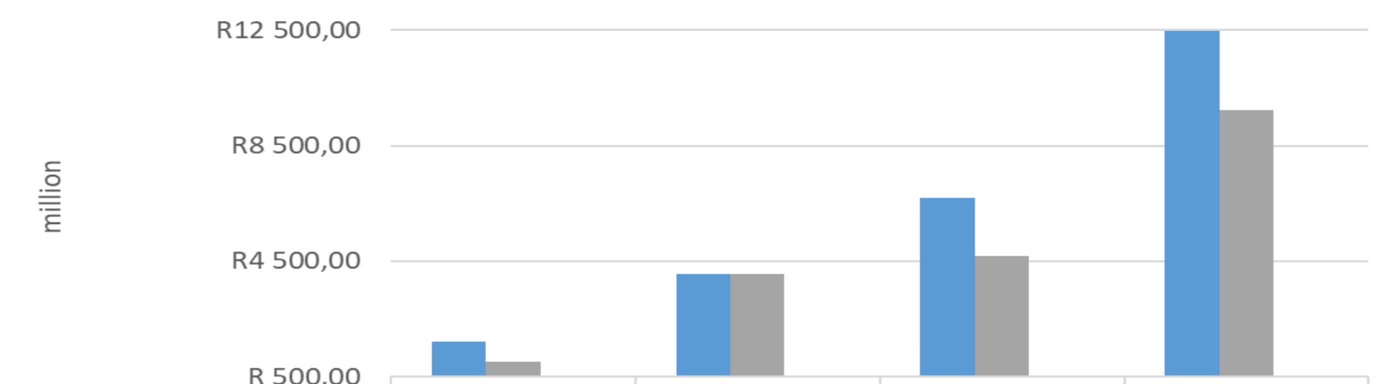
Source: STR Hotel Data February 2021

2.2 FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020: (INCOME AT CONSTANT 2015 PRICES FOR THE LATEST THREE MONTHS BY TYPE OF ENTERPRISE)

The total income of the food and beverages industry for the period January-March 2021 compared to same period last year is shown in figure 3 below. The total income of the food and beverages industry was about R 9 741,4 million in January-March 2021, recording a decrease of -21.9% when compared to income of about R12 466,4 million during the same period in 2020. All categories of food and beverages industry experienced a decline, with the highest negative growth seen in catering services (-41.1%), followed by restaurants and coffee shops (-30.2%) and take-away and fast food outlets (-0.1%).

Figure 3: Total income by type of food and beverages industry: January-March 2021 compared to January-March 2020 - Income at constant 2015 prices for the latest three months by type of enterprise



	Catering services	Take-away and fast food outlets	Restaurants and coffee shops	Total Industry
Jan-Mar 2020	R1 698,00	R4 065,70	R6 702,70	R 12 466,4
Jan-Mar 2021	R 999,6	R 4 062,3	R 4 679,5	R 9 741,4
Year on Year % Change	-41,1%	-0,1%	-30,2%	-21,9%

Source: Stats SA: Food and Beverages data cuts, 24th May 2021

Table 9 provides growth in total income for the different categories of the food and beverages industry. Comparing month on month performance of 2021 with that of 2020, there were highest declines in income from restaurants and coffee shops, followed by the catering services. For the take-aways and food outlets, declines in income during January and February 2021 were also recorded, however, there was a significant improvement in March 2021 when compared to the same month in 2020.

Table 9: Change in income by food and beverage type for January, February and March 2021 over 2020- Income at constant 2015 prices for the latest three months by type of enterprise

Food and Beverages categories	Jan 2021 vs Jan 2020	Feb 2021 vs Feb 2020	Mar 2021 vs Mar 2020
Catering services	-45,9%	-50,2%	-24,7%
Take-away and fast food outlets	-12,5%	-6,7%	22,8%
Restaurants and coffee shops	-50,6%	-32,1%	-0,4%
Total	-41,1%	-0,1%	-30,2%

Source: Stats SA: Food & Beverage data cuts 24th May 2021

2.3 AIRLINE INDUSTRY: PASSENGERS MOVEMENT

2.3.1 PASSENGER ARRIVALS MOVEMENT: JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

Table 10 shows the total passenger arrivals in Airports Company South Africa (ACSA) airports during January-March 2021 compared to January-March 2020. Total passenger arrivals decreased by -61.0%, from 4 569 312 in January-March 2020 to 1 784 120 during the same months in 2021. International passengers arriving during January-March 2021 declined by -86.2% compared to the same period in 2020. Regional passengers declined by 76,5% during the period under review. The number of domestic passengers also decreased by -50.8%, from 3 216 273 in January-March 2020 to 1 580 829 in January-March 2021. Passengers arriving on unscheduled flights also recorded a decrease of -20.8%.

Table 10.1 also provides the percentage growth by month for January-March 2021 compared to the same period in 2020 for the different categories of arriving passengers (international, regional, domestic and unscheduled) to South Africa.

Table 10: Arriving passengers to South Africa by region January-March 2021 compared to January-March 2021

Arriving Passengers	JAN-MAR 2020	JAN-MAR 2021	Difference	% Change
International	1 248 091	172 224	-1 075 867	-86,2%
Regional	93 491	21 989	-71 502	-76,5%
Domestic	3 216 273	1 580 829	-1 635 444	-50,8%
Unscheduled	11 457	9 078	-2 379	-20,8%
Total	4 569 312	1 784 120	-2 785 192	-61,0%

Source: ACSA data, April 2021

Table 10.1: Year on year % Change by month for arriving passengers: 2021 compared to 2020

MONTH	International	Regional	Domestic	Unscheduled
January	-88,8%	-80,7%	-63,4%	-48,4%
February	-90,0%	-82,2%	-64,1%	-25,7%
March	-73,1%	-61,1%	-11,1%	28,4%

Source: ACSA data, April 2021

2.3.2 PASSENGER DEPARTURE MOVEMENTS: JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

Table 11 below shows the total passengers departing from ACSA airports during the period January-March 2021 compared to January-March 2020. Total passengers departing from the country decreased by -60.7% in January-March 2021 compared to same period in 2020. The number of international, regional and domestic passengers departing from different ACSA airports also showed a decline. For passengers departing on international and regional flights, there was a decrease of -84.2% and -76.9% respectively. Departing domestic passengers declined by -51.0%, declining from 3 233 653 during January-March 2020 to 1 583 243 in January-March

2021. The number of passengers on unscheduled flights during this period decreased by -24.9%. Table 11.1 also provides the percentage growth by month for 2021 compared to 2020 for the different categories of departing passengers (international, regional, domestic and unscheduled) in South Africa.

Table 11: Departing passengers from South Africa by region: January-March 2021 compared to January-March 2021

Departing Passengers	JAN-MAR 2020	JAN-MAR 2021	Difference	% Change
International	1 281 738	202 286	-1 079 452	-84,2%
Regional	91 007	21 053	-69 954	-76,9%
Domestic	3 233 653	1 583 243	-1 650 410	-51,0%
Unscheduled	12 382	9 296	-3 086	-24,9%
Total	4 618 780	1 815 878	-2 802 902	-60,7%

Source: ACSA data cuts, April 2021

Table 11.1: Year % Change by month for departing passengers: 2021 compared to 2020

MONTH	International	Regional	Domestic	Unscheduled
January	-83,1%	-82,3%	-63,6%	-45,4%
February	-89,3%	-83,8%	-64,0%	-24,4%
March	-79,0%	-56,9%	-11,8%	0,4%

Source: ACSA data cuts, April 2021

2.4 TOURISM RELATED INDUSTRY EMPLOYMENT JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

EMPLOYMENT OF TOURISM RELATED INDUSTRIES JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

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 collecting QLFS data changed to Computer-assisted Telephone Interviewing (CATI). To facilitate CATI, the sample that was used for QLFS Q1: 2020 was also used in Q2: 2020, Q3: 2020, Q4: 2020 and Q1: 2021. However, not all dwelling units on the sample had contact numbers, and as a result the data was only collected from the part of the sample for which contact numbers were available for QLFS Q1: 2021. Considering the changes in the survey mode of collection and the fact that Q1: 2021 estimates are not based on a full sample, 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 12 indicates that an estimated 17,8% of South African jobs were created by tourism related industries during January-March 2021 which was a decrease of -9,8% (-285 842) in total jobs created by these tourism related industries when compared to January-March 2020 period.

Table 12: Tourism related industries employment: January-March 2021 compared to January-March 2020

Employment	JANUARY-MARCH 2021	JANUARY-MARCH 2020	Difference	% Growth
Total Tourism Related Industries Employment	2 623 995	2 909 837	-285 842	-9,8%
Total Employment	14 995 345	16 382 555	-1 387 211	-8,5%
& share of tourism related industries to total employment	17,5%	17,8%		

Source: Stats SA, Q1 2021 Labour Force Survey

Table 13 provides the share of the total jobs created by the different tourism related industries for the period January-March 2021 compared to January-March 2020. When tourism ratios are not applied, almost a half of tourism related jobs are created by the retail industry (49,8%) for the period January-March 2021 followed by road passenger transport industry (23,8%) and food and beverages (13,1%).

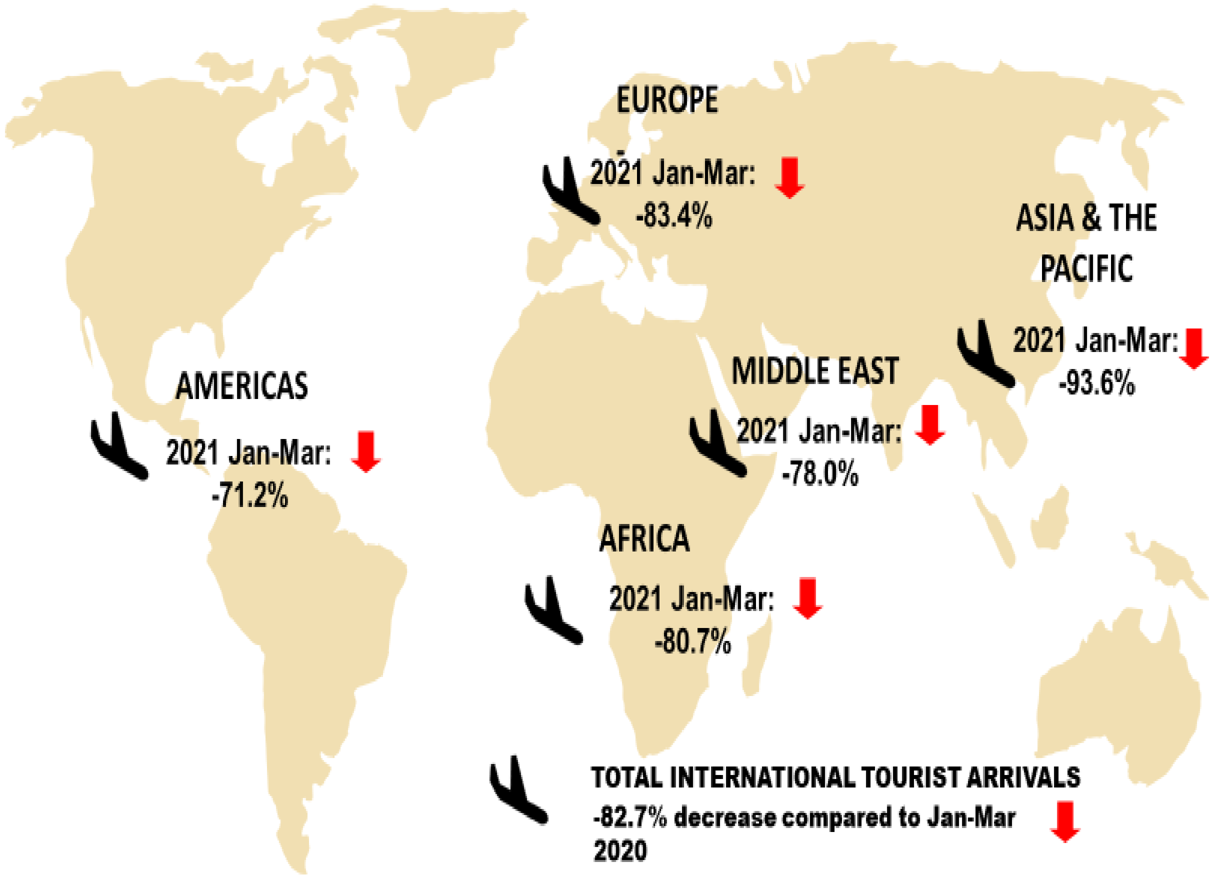
Table 13: Tourism related industries share of employment: January-March 2021 compared to January-March 2020

Tourism Related Industries	JANUARY-MARCH 2021	JANUARY-MARCH 2020
Retail trade	49,8%	47,1%
Road Passenger transport	23,8%	22,9%
Food and Beverage	13,1%	13,6%
Accommodation for tourists	4,0%	5,3%
Cultural Services	3,3%	3,7%
Sporting and other recreation services	2,1%	2,8%
Railway passenger transport	1,9%	2,3%
Other (Water passenger transport services, Air Passenger Transport, Transport Equipment Rental and Travel agencies)	2,0%	2,5%
Total Tourism Related Industries Employment	100,0%	100,0%

Source: Stats SA, Q1 2021 Labour Force Survey

SECTION 3 GLOBAL TOURISM PERFORMANCE: INTERNATIONAL TOURIST ARRIVALS BY REGION

Figure 4: percentage growth of global tourist arrivals by region: JANUARY-MARCH 2021 compared to JANUARY-MARCH 2020



Source: UNWTO Barometer May 2021Volume 19: Issue 3

The UNWTO has only released percentage growth by region for January-March 2021 compared to January-March 2020 and absolute figures have not yet been released. The tourism sector has been one of the most negatively impacted sectors by COVID-19 with most airlines being grounded, hotels closed and travel restrictions implemented in most countries around the world (UNWTO, 2020). The effect of the pandemic can be seen in the global tourist arrival figures for the period January-March 2021. Globally, total international tourist arrivals declined by -82.7% compared to the same period last year. Asia and the Pacific had the highest decrease (-93.6%) followed by Europe (-83.4%), Africa (-80.7%), Middle East (78,0%) and Americas (-71.2%).

SECTION 4: GLOBAL TOURISM RELATED INDUSTRIES PERFORMANCE

4.1 GLOBAL HOTEL PERFORMANCE, JAN-MARCH 2021 COMPARED TO JAN-MARCH 2020.

Table 14 indicates the global hotel performance for the period Jan-March 2021 compared to Jan-March 2020 and the source for the information is STR Global. The global hotel industry occupancy rates have declined for all regions except Asia and the Pacifica with a growth of 2,6%. Europe had the highest decline (-51,7%), followed by Africa and Middle East (-18,7%) and America (-13,6%).

Another key indicator used to measure hotel performance is the Average Daily Rate (ADR), which provides the average rate paid for rooms sold and is calculated by dividing room revenue by rooms sold. All regions recorded a decline in ADR during Jan-March 2021 compared to the same period last year. Europe recorded the highest decline (-22,5%) followed by Asia and the Pacific (-19,97), Americas (-19,6%) and the Middle East and Africa with -5,5% during the period under review. The Revenue per available room (RevPar) also declined for all regions with Europe recording the highest decline -62,7% followed by Americas (-30,4%), Africa and the Middle East (-23,2%) and Asia and the Pacific (-17,6%).

Table 14: Hotel performance January-March 2021 compared to January-March 2020

Region	Occupancy rate (%)			Average Daily Rate (ADR)			Revenue per available room (RevPAR) US$		
	2020 Jan-Mar	2021 Jan-Mar	% Change	US$ 2020 Jan-Mar	US$ 2021 Jan-Mar	% change	US$ 2020 Jan-Mar	US$ 2021 Jan-Mar	% Change
Asia and the Pacific	41,6%	42,7%	**2,6%**	97,17	78,04	**-19,7%**	40,4	33,3	**-17,6%**
Americas	51,4%	44,4%	**-13,6%**	123,79	99,55	**-19,6%**	63,6	44,2	**-30,4%**
Europe	48,7%	23,5%	**-51,7%**	109,43	84,8	**-22,5%**	53,3	19,9	**-62,7%**
Africa & Middle East	55,0%	44,7%	**-18,7%**	125,6	118,7	**-5,5%**	69,1	53,1	**-23,2%**

Source str Global Hotel Review: March 2021

4.2 AIR TRANSPORT PERFORMANCE JAN-MARCH 2021 COMPARED TO JAN-MARCH 2020.

Table 15 below provides an overview of the global performance of air passengers for period Jan-March 2021 compared to Jan-March 2020. The total market Revenue Passenger Kilometre (RPK) indicates that there was a declined of -26,3% during Jan-Mar 2021 compared to the same period last year. The Available Seat Kilometres (ASK) also showed a decline of -29.7%. Passenger Load Factor (PLF) for the total market increased to 62,3 in Jan-Mar 2021. In Jan-Mar 2021 the international and domestic markets had a PLF of 43,7% and 71.6% respectively, which means that there were slightly more seats filled with paying passengers on domestic flights compared to international flights in Jan-Mar 2021.

Table 15: Air passenger market overview January-March 2021 compared to January-March 2020

Total Market	RPK		ASK		PLF	
	Year on year % Change					
	2021	2020	2021	2020	2021	2020
International	-70,7%	-21,7%	-58,7%	-16,1%	43,7%	74,8%
Domestic	36,9%	-23,1%	8,3%	-12,2%	71,6%	71,9%
Total Market	**-26,3%**	-22,2%	**-29,7%**	-14,7%	**62,3%**	73,7%

Source: IATA, Air Passenger Market Analysis, May 2021

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