tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM QUARTERLY PERFORMANCE REPORT

3rd EDITION: JULY-SEPTEMBER 2021

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INTRODUCTION

The tourism quarterly performance report provides an analysis of tourist arrivals and tourism related industries for July-September 2021 period compared to July-September 2020. The report also provides an analysis of the impact of coronavirus (COVID-19) on the tourism related industries for the third quarter of 2021 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. During July-September 2021 period, South Africa was under different restriction levels, and these included adjusted alert level 4 from 1-25 July 2021 and adjusted alert level 3 from 26 July 2021 to 12 September 2021. To further limit the spread of the virus in the country's third wave of infections, South Africa shifted to adjusted alert level 2 restrictions, from 13-30 September 2021. Thus, South Africa was under three different lockdown restrictions, adjusted alert levels two, three and four during the said period, for which allowed international tourists to travel to South Africa subject to restrictions put in place. These restrictions stipulated that all travellers visiting the country will be expected to abide by the regulations that included 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 published data on the number of tourists during January to September 2021. Thus, this report provides an analysis of international tourist arrivals, performance of key related tourism industries namely; accommodation, aviation, food and beverages, and global tourism performance, for July-September 2021 period compared to the same period in 2020.

SECTION 1: SOUTH AFRICA TOURIST ARRIVALS PERFORMANCE: JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020

During July-September 2021 period, a total of 542 849 tourists were recorded. The Africa region had the highest share of tourist arrivals (84,0%) compared to overseas region with 15,8% share. Europe, with a total of 38 691 tourist arrivals, contributed 7,1% to the total tourist arrivals during July-September 2021. The effect of the 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. Due to the lockdown regulations during the same period in 2020, no tourists were allowed to enter South Africa as the country's borders were closed to limit the spread of COVID-19.

Table 1: Total Tourist Arrivals by Region July-September 2021 vs. July-September 2020

REGION	July-September 2021	% Share
EUROPE	38 691	7,1%
NORTH AMERICA	28 494	5,2%
CENTRAL & SOUTH AMERICA	2 542	0,5%
AUSTRALASIA	906	0,2%
MIDDLE EAST	4 132	0,8%
ASIA	11 164	2,1%
TOTAL OVERSEAS	85 929	15,8%
TOTAL AFRICA	455 879	84,0%
Unspecified	1041	0,2%
GRAND TOTAL	542 849	100,0%

Source: Stats SA, Tourism and Migration Reports: July-September 2021 and data cuts.

Table 2 below gives the rankings of the top ten African source markets for the period July-September 2021 compared to Jan-March 2020 as this is the period when tourists were allowed to enter the country before the COVID-19 lockdown restrictions were introduced. Ranking for July-September 2020 could not be done as inbound tourism to the country was not allowed during this period due to lockdown regulations that were in place.

Most of the top ten African source markets moved their positions except for Eswatini and Botswana, which ranked in 4th and 5th positions respectively during Jan-March 2020 and July-September 2021. Mozambique, Namibia, Zambia, Tanzania and DRC all improved their positions in 2021. Mozambique moved from 3rd position in Jan-March 2020 to 1st position in July-September 2021. DRC replaced Angola in the Jan-March 2020 top 10 list, moving from the 12th position in Jan-March 2020 to 10th position in July-September 2021. Zimbabwe moved from 1st to 2nd position and Lesotho from 2nd to 3rd position for the period under review. In 2021, Malawi dropped two levels, from its 6th position to 8th position.

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

Country	Rank: July-September 2021	Tourist Arrivals July-September 2021	Rank: Jan-March 2020 *(Month of July, August and September: 0 tourists recorded)*	Tourist Arrivals Jan-March 2020
Mozambique	1	133 610	3	345 026
Zimbabwe	2	91 390	1	582 694
Lesotho	3	87 470	2	413 724
Eswatini	4	45 042	4	188 948
Botswana	5	25 729	5	117 099
Namibia	6	20 933	7	36 098
Zambia	7	17 081	8	31 659
Malawi	8	14 995	6	43 325
Tanzania	9	3 280	10	8 459
DRC	10	2 777	12	6 352

Source: Stats SA, Tourism and Migration Reports: July-September 2021 and data cuts.

Table 3 shows the rankings of the top ten overseas source markets. Comparing July-September 2021 with Jan-March 2020, all of the top 10 moved their positions except for Germany, which remained at position 2. During Jul-Sept 2021, USA replaced UK as the main overseas source market, taking the 1st position whilst the UK dropped to 3rd position. And, Brazil and Australia entered the top 10 list, replacing Spain and Saudi Arabia respectively during the 2021 period.

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

Country	Rank: July-September 2021	Tourist Arrivals July-September 2021	Rank: Jan-March 2020 *(Month of July, August and September: 0 tourists recorded)*	Tourist Arrivals Jan-March 2020
USA	1	26 644	3	66016
Germany	2	6 826	2	98333
UK	3	6 109	1	119899
India	4	4 972	8	17113
France	5	4 362	4	37470
The Netherlands	6	4 030	5	32030
Spain	7	2 260	19	5668
Saudi Arabia	8	1 993	30	3087
Switzerland	9	1 984	10	13573
Canada	10	1 850	9	16157

Source: Stats SA, Tourism and Migration Reports: July-September 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 July-September 2021, the country was under lockdown adjusted level two, three and four restrictions. During July-September 2020, the country was under lockdown levels 3, 2 and 1. Table 4 below provides a summary of the different levels of the lockdown regulations during July-September 2021 and July-September 2020 for the accommodation, food and beverages 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.*

Table 4: South Africa COVID-19 regulations for the accommodation, food and beverages and aviation industries

01 July to 30 September 2020 **Lockdown levels 3, 2 and 1**	**01 July to 30 September 2021** **Adjusted alert levels 2, 3 and 4**
Accommodation	
Level 3-Commercially licensed accommodation establishments (except for home sharing) allowed to operate but 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. **Level 2**- 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. Interprovincial travel is permitted. **Level 1**-Hotels, lodges, bed and breakfasts, timeshare facilities, resorts and guest houses allowed full capacity of the available rooms for accommodation, with patrons observing a distance of at least one and a half metres from each other when in common spaces.	**Adjusted Level 4**-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. Travel into Gauteng is permitted only for work, for the transport of goods, for funerals or to return home. Travel between other provinces allowed. **Adjusted level 3**-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. Interprovincial travel permitted. **Adjusted level 2**-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. Interprovincial travel permitted.
Food and Beverages	
Level 3- Restaurants may open for delivery, collection and drive through but may not serve food on the premises.	**Adjusted Level 4**-Restuarants and bars were closed except for sale for off-site consumption of food and non-alcohol beverages.

01 July to 30 September 2020 Lockdown levels 3, 2 and 1	01 July to 30 September 2021 Adjusted alert levels 2, 3 and 4
Level 2-Restaurants all allowed to operate but subject to the strict adherence to all health protocols. **Level 1-** Restaurants all allowed to operate but subject to the strict adherence to all health protocols.	**Adjusted level 3-**Restuarants and bars needed to close by 9 pm. No onsite consumption of alcohol after 9pm, with a maximum of 50 persons or less for indoor venues and 100 persons or less for outdoor **Adjusted level 2**-Restuarants and bars needed to close by 10 pm. No onsite consumption of alcohol after 9pm, with a maximum of 250 persons or less for indoor venues and 500 persons or less for outdoor.
Aviation	
Level 3-Air passenger transport services prohibited **Level 2-**Ocean and air transport permitted only for the shipment of cargo **Level 1-**Domestic air travel for business only International flights not permitted	International travel allowed as of 01 October 2020.

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

2.1 ACCOMMODATION INDUSTRY

2.1.1 ACCOMMODATION INDUSTRY INCOME (*INCLUDING RESTUARANTS AND BAR SALES, AND OTHER INCOME)*: JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020

The total income from the accommodation industry including restaurants and bar sales, and other income is provided in table 5 below. Total income from the accommodation industry showed an increase of 89,9%, increasing from an amount of R2 511,1 million in Jul-Sept 2020 to R4 541,60 million in Jul-Sept 2021. Compared to Jul-Sept 2020, all categories of accommodation experienced an increase in income during the same period in 2021, and this could be attributed to the easing of the lockdown regulations, which allowed accommodation businesses to operate during adjusted levels 4, 3 and 2 that were in place during this period. It should be noted that during Jul-Sept 2020 most of the accommodation establishments were prevented from operating. Guest houses and guest farms had the highest increase (238,4%), followed by caravan parks and camping sites (140,3%), other accommodation (93,8%) and Hotels (69,1%). Other category includes lodges, bed-and-breakfast, self-catering and 'other' establishments not classified.

Table 5: Income from accommodation including restaurants and bar sales (current prices: July-September 2021 compared to July-September 2020

Type of Accommo-dation	July-September 2021				July-September 2020				% Change Total Income
	Restaurants, bar sales	Accom-modation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Jul-Sept 2021 compared to Jul-Sept 2020
Hotels (R million)	R581,7	R1 215,6	R1 026,2	R2 823,50	R261,9	R536,5	R871,2	R1 669,6	69,1%
Caravan parks and camping sites (R million)	R1,9	R73,3	R0,5	R75,70	R0,8	R29,8	R0,9	R31,5	140,3%
Guest houses and guest farms (R million)	R12,4	R153,9	R3,6	R169,90	R4,8	R43,8	R1,6	R50,2	238,4%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified)	R142,9	R1 236,3	R93,3	R1 472,50	R74,0	R631,8	R54,0	R759,8	93,8%

Type of Accommo-dation	July-September 2021				July-September 2020				% Change Total Income
	Restaurants, bar sales	Accom-modation only	Other income	Total income	Restaura nts, bar sales	Accommo dation only	Other Income	Total income	Jul-Sept 2021 compared to Jul-Sept 2020
(R million)									
Total Industry - (R million)	R738,9	R2 679,1	R1 123,6	R4 541,60	R341,5	R1 241,9	R927,7	R2 511,1	80,9%

Source: Stats SA: Accommodation data cuts, 22nd November 2021

2.1.2 INCOME FROM ACCOMMODATION (*EXCLUDING RESTAURANTS, BAR SALES AND OTHER INCOME)*: JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020

Table 6 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 115,7% during Jul-Sept 2021 period. All categories of accommodation recorded an increase in income levels with guest houses and guest farms experiencing the highest increase of 251,4%; followed by caravan parks and camping sites (146,0%); hotels (126,6%) and other accommodation (95,7%).

Table 6: Income from accommodation only: July-September 2021 compared to July-September 2020

Type of Accommodation	July-September 2021 Accommodation only	July-September 2020 Accommodation only	% Change July-September 2021 compared to July-September 2020
Hotels (R million)	R1 215,6	R536,5	126,6%
Caravan parks and camping sites (R million)	R73,3	R29,8	146,0%
Guest houses and guest farms (R million)	R153,9	R43,8	251,4%
Other accommodation (R million)	R1 236,3	R631,8	95,7%
Total Industry (R million)	R2 679,1	R1 241,9	115,7%

Source: Stats SA: Accommodation data cuts, 22nd November 2021

The percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) from July-September 2021 is provided in table 7 below. Income from accommodation increased by 241,5%, 125,4% and 74,4% during July, August and September 2021 respectively compared to the same months in 2020.

Table 7: Year on Year Change in income from Accommodation

MONTH	2020	2021
July	-92,0%	241,5%
August	-83,2%	125,4%
September	-74,4%	74,4%

Source: Stats SA: Accommodation data cuts, 22nd November 2021

2.1.3 ACCOMMODATION INDUSTRY OCCUPANCY RATE: JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020

Table 8 shows occupancy rates by accommodation type from July-September 2021 compared to July-September 2020. The occupancy rate of all accommodation establishments increased during the months of July, August and September 2021 compared to the same months in 2020. Despite low occupancy rate over the months, there was a slight increase in occupancy rate in September 2021 (27.2%) compared to August (21.9%) and July 2021 (15.9%) occupancy rates.

Table 8: Occupancy Rate (%): July-September 2021 compared to July-September 2020

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jul-21	12,4	33,7	8,2	19,3	15,9
Jul-20	5,8	0,6	3,3	5,1	4,9
Aug-21	20,3	30,6	15,3	24,4	21,9
Aug-20	9	6,4	3,4	12,3	9,2
Sept-21	26,7	33,3	19,1	28,9	27,2
Sept-20	15,2	21,1	7,2	21,5	16,8

Source: Stats SA: Tourist Accommodation data cuts, 22nd November 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 July, August and September 2021 compared to same months of the previous year is provided in table 9 below. The sample size and population for each month are also included in the table.

Comparing the STR hotel occupancy rates for the months of July, August and September 2021 to the same months in 2020, an increase in occupancy rates for all months was seen, with September 2021 having the most improved occupancy rate compared to September 2020. The Average Daily Rate (ADR) for July, August and September 2021 also increased compared to the same months in 2020. During July, August and September 2021, the Revenue Per available room also increased compared to the same months last year. These figures follow the same trend reported by Stats SA for the accommodation industry.

Table 9: South Africa Hotel Performance: July-September 2021 compared to July-September 2020

Indicators	Size		Occ %		ADR		RevPAR		Percent Change		
Months	**Sample**	**Pop**	**2021**	**2020**	**2021**	**2020**	**2021**	**2020**	**Occ**	**ADR**	**RevPAR**
July	213	373	17,9	18,5	R984,6	R785,4	R176,1	R145,7	-3,6	25,4	20,9
August	217	415	31,6	23	R1 019,7	R839,5	R322,7	R193,0	37,6	21,5	67,2
September	217	416	41,5	26,7	R1 051,3	R999,8	R435,9	R267,1	55,2	5,1	63,2

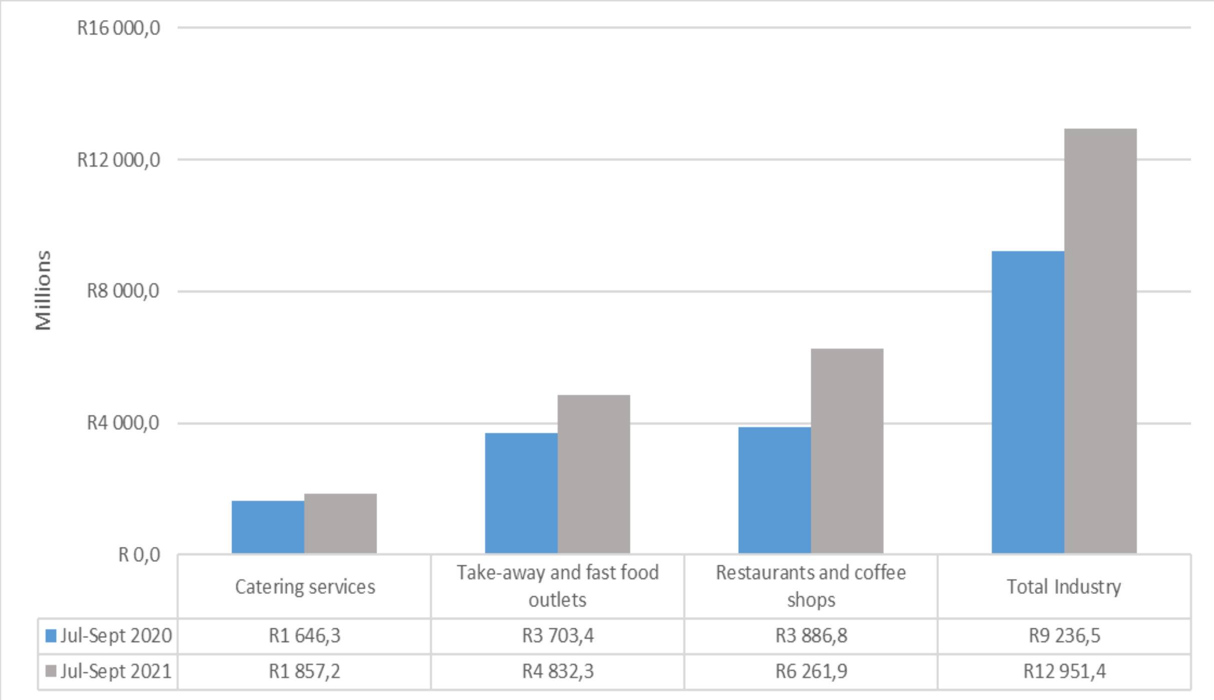
Source: STR Hotel Data July, August and September 2021

2.2 FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020: (INCOME AT CURRENT PRICES FOR THE LATEST THREE MONTHS BY TYPE OF ENTERPRISE)

The total income of the food and beverages industry for the period July-September 2021 compared to the same period of the previous year is shown in figure 3 and table 10 below. The total income of the food and beverages industry was about R 12 951,4 million in July-September 2021, recording an increase of 40,2% when compared to income of about R 9 236,5 million during the same period in 2020. All categories of food and beverages industry experienced an increase, with the highest positive growth seen in restaurants and coffee shops (61,1%), followed by take-away and fast food outlets (30,5%) and catering services (12,8%).

Figure 3: Total income by type of food and beverages industry: July-September 2021 compared to July-September 2020 - Income at current prices for the latest three months by type of enterprise



Source: Stats SA: Food and Beverages data cuts, 22nd November 2021

Table 10 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, the highest total increase in income was from restaurants and coffee shops (61,1%), followed by take-aways and food outlets (30,5%) and the catering services (12,8%).

Table 10: Change in income by food and beverage type for July, August and September 2021 over 2020- Income at current prices for the latest three months by type of enterprise

Food and Beverages categories	July 2021 vs Jul 2020	Aug 2021 vs Aug 2020	Sept 2021 vs Sept 2020	Total
Catering services	6,2%	21,9%	10,8%	12,8%
Take-away and fast food outlets	28,4%	29,5%	33,4%	30,5%
Restaurants and coffee shops	84,2%	87,0%	32,0%	61,1%

Source: Stats SA: Food & Beverage data cuts, 22nd November 2021

2.3 AIRLINE INDUSTRY: PASSENGERS MOVEMENT

2.3.1 PASSENGER ARRIVALS MOVEMENT: JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020

Table 11 shows the total passenger arrivals in Airports Company South Africa (ACSA) airports during July-September 2021 compared to July-September 2020. Total passenger arrivals increased by 172,8%, from 654 093 in July-September 2020 to 1 784 261 during the same months in 2021. International passengers arriving during July-September 2021 increased by 49 684,0% compared to the same period in 2020. The number of domestic passengers also increased by 129,2%, from 630 845 in July-September 2020 to 1 445 885 in July-September 2021. These results could be attributed to the lockdown restrictions that were eased to allow international travel as from 01 October 20201. Strict lockdown regulations were in place during July, August and September 2020 and these regulations prevented people from travelling internationally and domestically. International airlines where only allowed to operate in South Africa as of 01 October 2020. Overall, passengers arriving on unscheduled flights recorded a decrease of -52,9%.

Table 11.1 also provides the percentage growth by month for July-September 2021 compared to the same period in 2020 for the different categories of arriving passengers (international, regional, domestic and unscheduled) to South Africa.

Table 11: Arriving passengers to South Africa by region July-September 2021 compared to July-September 2021

Arriving Passengers	July-Sept 2020	July-Sept 2021	Difference	% Change
International	582	289 743	289 161	49 684,0%
Regional	0	37 965	37 965	*1/
Domestic	630 845	1 445 885	815 040	129,2%
Unscheduled	22 666	10 668	-11 998	-52,9%
Total	654 093	1 784 261	1 130 168	172,8%

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

Source: ACSA data cuts, September 2021

Table 11.1: Year on year % Change by month for arriving passengers: 2021 compared to 2020

MONTH	International	Regional	Domestic	Unscheduled
July	26 950,7%	*1/	155,6%	-50,3%
August	32 670,3%	*1/	155,4%	-55,4%
September	100,0%	*1/	106,7%	-52,4%

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

Source: ACSA data, September 2021

2.3.2 PASSENGER DEPARTURE MOVEMENTS: JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 2020

Table 12 below shows the total passengers departing from ACSA airports during the period July-September 2021 compared to July-September 2020. Total passengers departing from the country increased by 166,0% in July-September 2021 compared to same period in 2020. The number of international and domestic passengers departing from different ACSA airports also showed an increase. For passengers departing on international flights there was an increase of 229 594,8% during the period under review. Departing domestic passengers also increased by 128,6% moving from 634 428 during July-September 2020 to 1 450 296 in July-September 2021. The number of passengers on unscheduled flights during this period decreased by -76,4%.

Table 12.1 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 12: Departing passengers from South Africa by region: July-September 2021 compared to July-September 2021

Departing Passengers	Jul-Sept 2020	Jul-Sept 2021	Difference	% Change
International	134	307 791	307 657	229 594,8%
Regional	0	37 278	37 278	*1/
Domestic	634 428	1 450 296	815 868	128,6%
Unscheduled	44 433	10 475	-33 958	-76,4%
Total	678 995	1 805 840	1 126 845	166,0%

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

Source: ACSA data cuts, September 2021

Table 12.1: Year % Change by month for departing passengers: 2021 compared to 2020

MONTH	International	Regional	Domestic	Unscheduled
July	147 091,7%	*1/	156,1%	-78,8%
August	674 586,7%	*1/	154,2%	-80,1%
September	200 362,7%	*1/	106,1%	-69,5%

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

Source: ACSA data cuts, September 2021

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

EMPLOYMENT OF TOURISM RELATED INDUSTRIES JULY-SEPTEMBER 2021 COMPARED TO JULY-SEPTEMBER 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 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 17,1% of South African jobs were created by tourism related industries during July-September 2021, and that was a decrease of -5,7% (-147 599) in total jobs created by the tourism related industries when compared to July-September 2020. Total employment also declined by -2,8% during July-September 2021 compared to July-September 2020.

Table 13: Tourism related industries employment: July-September 2021 compared to July-September 2020

Employment	JULY-SEPTEMBER 2021	JULY-SEPTEMBER 2020	Difference	% Growth
Total Tourism Related Industries Employment	2 448 009	2 595 608	-147 599	-5,7%
Total Employment	14 282 007	14 690 869	-408 862	-2,8%
Share of tourism related industries to total employment	17,1%	17,7%		

Source: Stats SA, Q3 2021 Labour Force Survey data cuts

Table 14 provides the share of the total jobs created by the different tourism related industries for the period July-September 2021 compared to July-September 2020. When tourism ratios are not applied, more than half of tourism related jobs are created by the retail industry (51,6%) followed by road passenger transport industry (23,2%) and food and beverages (12,0%) during July-September 2021.

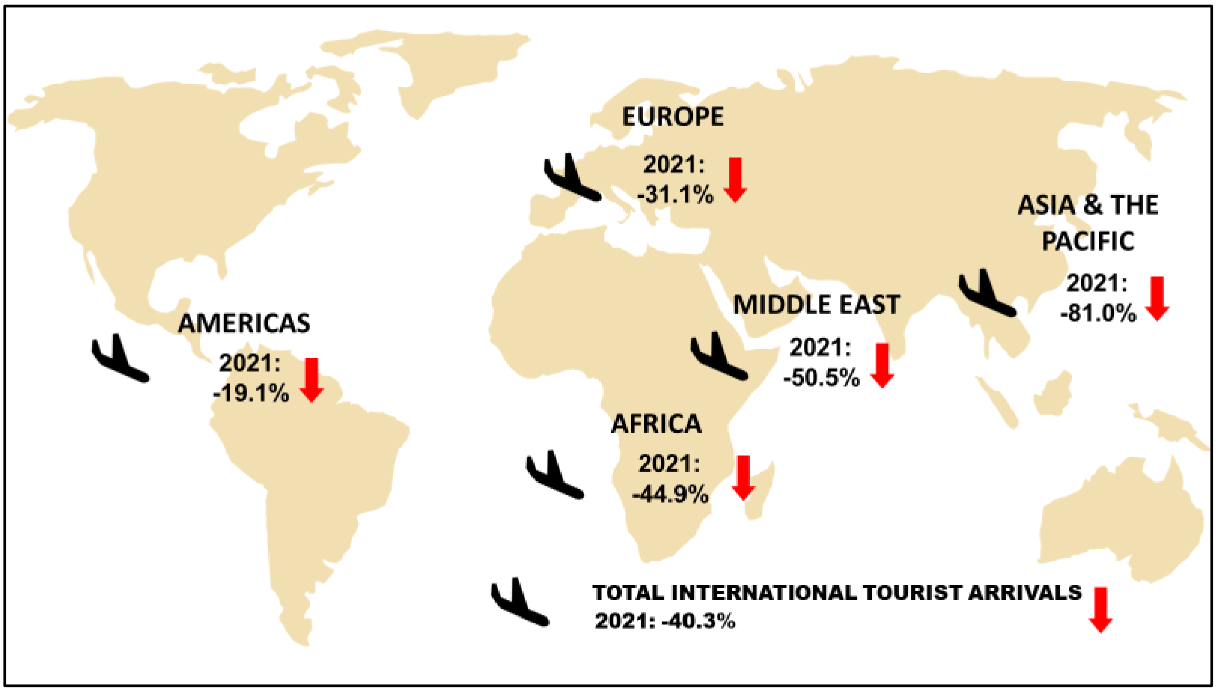
Table 14: Tourism related industries share of employment: July-September 2021 compared to July-September 2020

Tourism Related Industries	JULY-SEPTEMBER 2021	JULY-SEPTEMBER 2020
Retail trade	51,6%	47,5%
Road Passenger transport	23,2%	26,3%
Food and Beverages	12,0%	11,9%
Accommodation for tourists	3,5%	4,3%
Cultural Services	2,9%	3,5%
Sporting and other recreation services	2,6%	2,4%
Railway passenger transport	2,1%	2,5%
Other (Water passenger transport services, Air Passenger Transport, Transport Equipment Rental and Travel agencies)	1,6%	2,2%
Total Tourism Related Industries Employment	100,0%	100,0%

Source: Stats SA, Q3 2021 Labour Force Survey data cuts

SECTION 3 GLOBAL TOURISM PERFORMANCE: INTERNATIONAL TOURIST ARRIVALS BY REGION

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



Source: UNWTO Barometer September 2021 Volume 19: Issue 5

The UNWTO has only released percentage growth by region for Jan-July 2021 compared to Jan-July 2020 and absolute figures have not yet been released. Globally, total international tourist arrivals declined by -40.3% compared to the same period last year. Asia and the Pacific had the highest decrease (-81.0%) followed by Middle East (-50.5%), Africa (-44.9%), Europe (-31.1%) and Americas (-19.1%).

SECTION 4: GLOBAL TOURISM RELATED INDUSTRIES PERFORMANCE

4.1 GLOBAL HOTEL PERFORMANCE, JANUARY-SEPTEMBER 2021 COMPARED TO JANUARY-SEPTEMBER 2020.

STR hotel does not produce quarterly reports therefore, Table 15 indicates the global hotel performance for the period January-September 2021 compared to January-September 2020, from STR Global. Comparing January-September 2021 to January-September 2020, global hotel industry occupancy rates increased for all regions. Americas had the highest increase (27,1%), followed by Africa and Middle East (19,1%), Asia and the Pacific (13,1%) and Europe with 10,5% increase.

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 an increase in ADR during January-September

2021 compared to the previous quarter with Americas having the highest increase (13,7%), followed by Europe (11,1%), Africa and Middle East (5,9,1%) and Asia and the Pacific with 5,4% increase. The Revenue per available room (RevPar) increased for all regions. Americas had the highest increase (44,5%), followed by Africa and Middle East (26,1%), Europe (22,8%) and Asia and the Pacific (19,2%).

Table 15: Hotel performance January-September 2021 compared to January-September 2020

Region	Occupancy rate (%)			Average Daily Rate (ADR)			Revenue per available room (RevPAR) US$		
	2020 Jan-Sept	2021 Jan-Sept	% Change	US$ 2020 Jan-Sept	US$ 2021 Jan-Sept	% change	US$ 2020 Jan-Sept	US$ 202 Jan-Sept	% Change
Asia and the Pacific	41,5%	46,9%	13,1%	US$74,85	US$78,9	5,4%	US$31,05	US$37,03	19,2%
Americas	43,5%	55,4%	27,1%	US$106,3	US$120,8	13,7%	US$46,29	US$66,9	44,5%
Europe	35,8%	39,6%	10,5%	US$107,7	US$119,7	11,1%	US$38,59	US$47,4	22,8%
Africa & Middle East	39,9%	47,5%	19,1%	US$111,3	US$117,8	5,9%	US$44,36	US$55,9	26,1%

Source STR Global Hotel Review: September 2021

4.2 AIR TRANSPORT PERFORMANCE JULY, AUGUST AND SEPTEMBER 2021 COMPARED TO JULY, AUGUST AND SEPTEMBER 2020.

The International Air Transport Association (IATA) produces monthly air passenger market analysis reports. The data is not released on a quarterly basis therefore, the information provided in the table below indicates the percentage change for July, August and September 2021 compared to the same months in 2020. Comparing total market Revenue Passenger Kilometre (RPK), for July, August and September 2021 to the same months of previous year, July 2021 experienced the highest increase (123,9%) compared to July 2020. Available Seat Kilometres (ASK) for total market showed an increase in July, August and September 2021 compared to same months in 2020. For July, August and September 2021, the Passenger Load Factor (PLF) also experienced an increase compared to the same months in 2020.

Table 16: Air passenger market overview: July, August and September 2021 (% year on year)

	International			Domestic			Total Market		
% Change	**RPK**	**ASK**	**PLF**	**RPK**	**ASK**	**PLF**	**RPK**	**ASK**	**PLF**
July 2021 compared to July 2020	197.6%	133.8%	13.3%	96.1%	53.5%	17.7%	123.9%	80.0%	14.3%
August 2021 compared to August 2020	145.8%	91.7%	14.4%	37.8%	19.4%	10.0%	72.9%	46.9%	10.5%
September 2021 compared to September 2022	150.9%	88.6%	15.3%	33.8%	28.3%	3.0%	67.3%	51.1%	6.6%

Source: IATA, Air Passenger Market Analysis, July, August and September 2021

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