



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM QUARTERLY PERFORMANCE REPORT

**4th EDITION: OCTOBER-DECEMBER
2020**



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INTRODUCTION

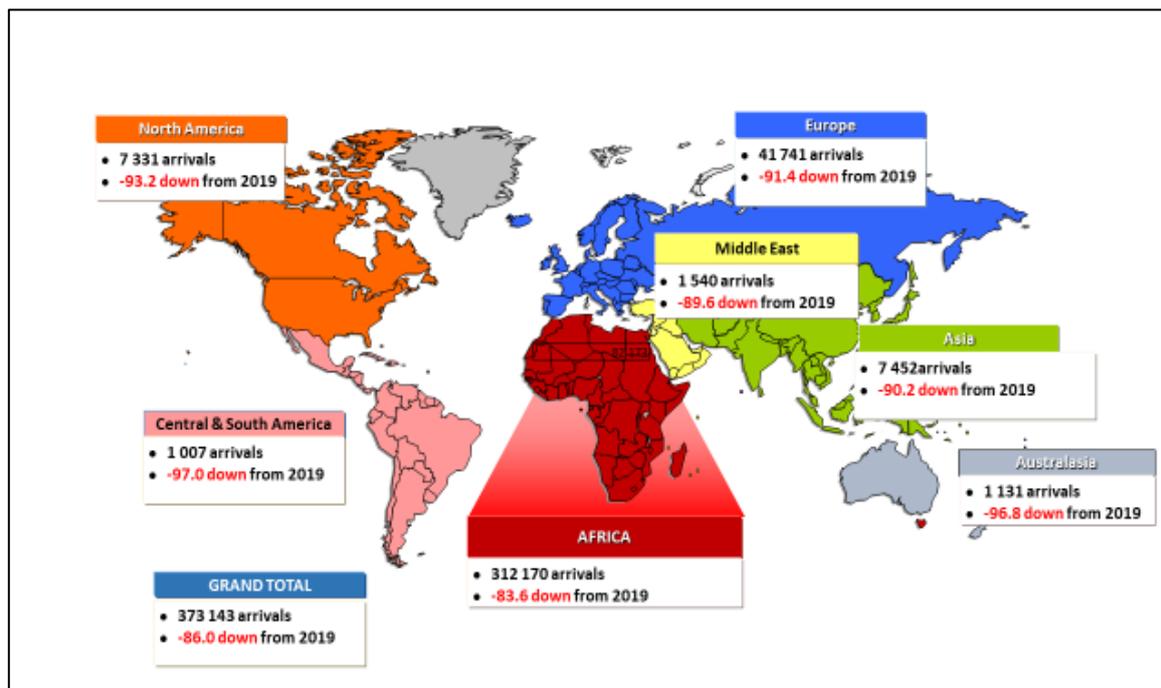
The tourism quarterly performance report provides an analysis of tourist arrivals and tourism related industries for the period October-December 2020 compared to October-December 2019. The report also provides an analysis of the impact of coronavirus (COVID-19) on the tourism sector in the last quarter of 2020 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 corona virus. 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. From 21 September to 28 December 2020, South Africa was under lockdown level one; and moved to adjusted level three from 29 December 2020 to 28 February 2021. South Africa was therefore under lockdown level one and adjusted alert level three during October –December 2020 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 October to December 2020. Thus, this report provides an analysis of all tourists during October to December 2020 as well as the performance of key related tourism industries namely; accommodation, food and beverages, and aviation for October-December 2020 period compared to the same period in 2019.

Annexure 1-attached- is the December 2020 monthly report which provides an analysis of total tourists for the period Jan-Dec 2020 compared to same period last year. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for January-December 2020 compared to January-December 2019 is also provided in this Annexure 1.

SECTION 1: SOUTH AFRICA TOURIST ARRIVALS PERFORMANCE: OCTOBER-DECEMBER 2020 COMPARED TO OCTOBER-DECEMBER 2019

Tourist arrivals figures by region for the period October-December 2020 compared to the same period in 2019 are indicated in figure 1 below. Total tourist arrivals (373 143) went down by -86.0% (-2 292 707) for the period October-December 2020 compared to the same period in 2019 (2 665 850). Central and South America (-97.0%) recorded the highest decrease followed by Australasia (-96.8%), North America (-93.2%), Europe (-91.4%), Asia (-90.2%) and Middle East with a decrease of -89.6%. Tourist arrivals from Africa decreased by -83.6% (-1 596 657) during the same period under review.

Figure 1: Total Tourist Arrivals by Region October-December 2020 vs. October-December 2019



Source: Stats SA, Tourism and Migration: December 2020 and data cuts.

SOUTH AFRICA TOURIST ARRIVALS

PERFORMANCE: OCTOBER-DECEMBER 2020 COMPARED TO OCTOBER-DECEMBER 2019 CONTINUED

Further analysis indicates that the declining growth recorded in Central and South America (-97.0%) was driven by Brazil with a decline of -97.8% (-22 782) followed by Argentina with -95.9% (-2 646). All countries in the Europe region had a decline in tourist arrivals. Similarly, countries from all other regions had experienced a decline in tourist arrivals during the period under review. The decline in Australasia was driven by a decrease of -97.0% (-28 268) from Australia, followed by New Zealand with -95.6% growth rate. In the Middle East region, Israel experienced the highest drop in volume of -8 714 (-92.5%), followed by Saudi Arabia with -1 990 (-93.5%). Tourist arrivals from Africa decreased by -83.6% (-1 596 657) 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 -459 756 (-81.9%) from Zimbabwe, followed by Lesotho (-327 983/-90.4%) and Mozambique (-250 780/-76.4%). 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 OCTOBER-DECEMBER 2020 vs. OCTOBER-DECEMBER 2019

REGION	OCTOBER-DECEMBER 2019	OCTOBER-DECEMBER 2020	Diff	% Diff
EUROPE	486 371	41 741	-444 630	-91.4%
NORTH AMERICA	107 247	7 331	-99 916	-93.2%
CENTRAL & SOUTH AMERICA	33 133	1 007	-32 126	-97.0%
AUSTRALASIA	34 877	1 131	-33 746	-96.8%
MIDDLE EAST	14 771	1 540	-13 231	-89.6%
ASIA	76 206	7 452	-68 754	-90.2%
TOTAL OVERSEAS	752 605	60 202	-692 403	-92.0%
TOTAL AFRICA	1 908 827	312 170	-1 596 657	-83.6%
Unspecified	4 418	771	-3 647	-82.5%
GRAND TOTAL	2 665 850	373 143	-2 292 707	-86.0%

Source: Stats SA: Tourism and Migration report: December 2020 and data cuts

Table 2 gives the rankings of the top ten African source markets for the period October-December 2020 compared to same months in 2019. Only three of the top ten African source markets remained in the same position, and these include Zimbabwe (maintaining 1st position), Eswatini (maintaining 4th position) and Tanzania (maintaining 10th position). Some countries improved their position in the top ten list; Mozambique moved up from 3rd position in 2019 to 2nd position in 2020, Namibia from 7th position in 2019 to 5th position in 2020 and Zambia from 8th position in 2019 to 6th position in 2020. Other countries lose their positions; Lesotho dropped from the 2nd position in 2019 to 3rd position in 2020, Botswana from 5th position in 2019 to 7th position in 2020 and Malawi from 6th position in 2019 to 8th position in 2020. The Democratic Republic of Congo (DRC) entered the top 10 markets in 2020 in the 9th position replacing Angola, which dropped to the 12th position in 2020. All of the top ten countries recorded a negative growth rate in tourist arrivals, with the highest decline of arrivals recorded from Lesotho (-109.6%), followed by Botswana (-93.7%), Eswatini (-89.1%), Zimbabwe (-81.9%), Malawi (-81.0%), Mozambique (-76.4%), Tanzania (-76.0%), DRC (67,2%), Namibia (-63.1%) and Zambia with (-62.0%).

Table 2: South Africa's Top 10 African Source Markets: October-December 2020 vs. October-December 2019

COUNTRY	Rank: October-December2020	Tourist arrivals October-December2020	Rank: October-December2019	Tourist arrivals October-December2019	% Diff
Zimbabwe	1	101 852	1	561 608	-81.9%
Mozambique	2	77 511	3	328 291	-76.4%
Lesotho	3	35 021	2	363 004	-109.6%
Eswatini	4	25 999	4	238 646	-89.1%
Namibia	5	18 413	7	49 859	-63.1%
Zambia	6	14 827	8	38 980	-62.0%
Botswana	7	12 368	5	194 913	-93.7%
Malawi	8	10 040	6	52 778	-81.0%
DRC	9	2 710	11	8 269	-67.2%
Tanzania	10	2 518	10	10 484	-76.0%

Source: Stats SA: Tourism and Migration report: December 2020 and data cuts.

Table 3 below shows the rankings of the top ten overseas source markets. Comparing October-December 2020 with October-December 2019, all of the top 10 overseas markets recorded a decrease in tourist arrivals. Despite this decline, half of the top ten overseas markets remained in the same position namely; UK, Germany, USA, France and Netherlands for the period under review. Belgium, Pakistan and Canada moved into the top 10 ranking in 2020 replacing Australia, Brazil and China, which were in the top 10 during the last three months of 2019. Switzerland moved from 10th position in 2019 to 6th position in 2020. India improved its position from the 8th in 2019 to the 7th position in 2020. Belgium moved from 12th position in 2019 to 8th position and Pakistan experienced the highest improvement, moving up from 29th position in 2019 to 9th position in 2020. Canada moved from the 11th position in 2019 to the 10th position in 2020. The effects of corona virus on tourist arrivals have been seen in different countries, and yet the UK remained the main source market from overseas, despite a decline in growth of -90.5%.

Table 3: South Africa's Top 10 Overseas Source Markets: October-December 2020 vs. October-December 2019

COUNTRY	Rank: October-December 2020	Tourist arrivals October-December 2020	Rank: October-December 2019	Tourist arrivals October-December 2019	% Diff
UK	1	12 485	1	130 859	-90.5%
Germany	2	7 759	2	115 754	-93.3%
USA	3	5 943	3	87 537	-93.2%
France	4	3 553	4	48 303	-92.6%
Netherlands	5	2 996	5	43 244	-93.1%
Switzerland	6	2 124	10	19 960	-89.4%
India	7	1 779	8	22 814	-92.2%
Belgium	8	1 718	12	16 319	-89.5%
Pakistan	9	1 489	29	3 225	-53.8%
Canada	10	1 388	11	19 710	-93.0%

Source: Stats SA: Tourism and Migration report: December 2020

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

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

On 11 March 2020, the World Health Organisation (WHO) declared the corona virus (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) corona virus alert levels were introduced, which indicated the different restrictions put in place and sectors that can operate under these levels. During October-December 2020, the country was under lockdown level one and adjusted level three lockdown restrictions. Figure 2 below provides a summary of the different levels of the lockdown regulations during October-December 2020 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

Level 1 21 September-28 December		Adjusted Level 3 29 December 2020-28 Feb 2021	
Accommodation			
Level 1		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.		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			
Level 1		Adjusted Level 3	
Restaurants all allowed to operate but subject to the strict adherence to all health protocols.		Restaurants all allowed to operate but subject to the strict adherence to all health protocols 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.	
Aviation			
Level 1		Adjusted Level 3	
Domestic air travel allowed. International travel allowed as of 01 October 2020.		Domestic air travel allowed. International travel allowed.	

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

2.1 ACCOMMODATION INDUSTRY

2.1.1 ACCOMMODATION INDUSTRY INCOME: OCTOBER-DECEMBER 2020 COMPARED TO OCTOBER-DECEMBER 2019

The total income from the accommodation industry is provided in table 4 below. Total income from the accommodation industry showed a decline of -62.7%; declining from an amount of R13 428,9 million in Oct-Dec 2019 to R5 005,30 million in Oct-Dec 2020. Compared to the previous quarter in 2019, all categories of accommodation experienced a decline in income. Hotels had the highest decline (-65.4%), followed by other accommodation (-54.8%), guest houses and guest farms (-45.9%), and caravan parks and camping sites (-40.1%). Other category includes lodges, bed-and-breakfast, self-catering and 'other' establishments not classified.

Table 4: Income from accommodation (current prices: October-December 2020 compared to October-December 2019)

Type of Accommodation	Oct-Dec 20				Oct-Dec 2019				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other income	Total income	Oct-Dec 2020 compared to Oct-Dec 2019
Hotels (R million)	R802.6	R1 602.7	R1 185.8	R3 591.10	R1 869.5	R4 575.9	R3 945.0	R10 390.4	-65.4%
Caravan parks and camping sites (R million)	R0.7	R52.7	R0.1	R53.50	R3.2	R83.3	R2.8	R89.3	-40.1%
Guest houses and guest farms (R million)	R22.7	R139.3	R8.3	R170.30	R34.6	R262.2	R17.8	R314.6	-45.9%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R146.9	R957.1	R86.4	R1 190.40	R304.0	R2 147.8	R182.8	R2 634.6	-54.8%
Total Industry - (R million)	R972.9	R2 751.8	R1 280.6	R5 005.30	R2 211.3	R7 069.2	R4 148.4	R13 428.9	-62.7%

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

2.1.2 Income from Accommodation (excluding restaurants, bar sales and other income): October-December 2020 compared to October-December 2019

Table 5 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went down by -61.1% during the same period under review. All categories of accommodation recorded a decline in income levels with hotels recording the highest decline of -65,0%; followed by other accommodation (-55,4%); guest houses and guest farms (-46,9%) and caravan parks and camping sites (-36,7%).

Table 5: Income from accommodation only: October-December 2020 compared to October-December 2019

Type of Accommodation	October-December 2020 Accommodation only	October-December 2019 Accommodation only	% Change October-December 2020 compared to October-December 2019
Hotels (R million)	R1 602,7	R4 575,9	-65.0%
Caravan parks and camping sites (R million)	R52,7	R83,3	-36.7%
Guest houses and guest farms (R million)	R139,3	R262,2	-46.9%
Other accommodation (R million)	R957,1	R2 147,8	-55.4%
Total Industry (R million)	R2 751,8	R7 069,2	-61.1%

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

The percentage change of income from the accommodation industry (excluding restaurants, bar sales and other income) from October to December 2020 is provided in table 6 below. Income from accommodation decreased by -66.4%, -66.2% and -51.5% during October, November and December 2020 respectively compared to the same months in 2019. Although the income from accommodation continued to decrease over the months, the December 2020 decline was the lowest and this could be attributed to the easing of lockdown regulations, which saw South Africa introducing level one lockdown restrictions from 21 September to 28 December 2020. And, the December month is the summer holiday month, when some South Africans travel to other tourism destinations for vacation/holiday purposes.

Table 6: Year on Year Change in income from Accommodation

MONTH	2019	2020
Oct	1.8%	-66.4%
November	-0.6%	-66.2%
December	1.0%	-51.5%

Source: Stats SA: Tourist Accommodation Report (Preliminary) December 2020

2.1.3 ACCOMMODATION INDUSTRY OCCUPANCY RATE: OCTOBER-DECEMBER 2020 COMPARED TO OCTOBER-DECEMBER 2019

Table 7 shows occupancy rates by accommodation type from October-December 2020 compared to October-December 2019. The occupancy rate of all accommodation establishments declined during the months of October, November and December 2020 compared to the same months in 2019. However, despite low occupancy rate over the months, there was an improvement recorded in December 2020 (30.2%) occupancy rate compared to November (24.2%) and October 2020 (23.1%).

Table 7: Occupancy Rate: OCTOBER-DECEMBER 2020 compared to OCTOBER-DECEMBER 2019

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Oct-20	20.5%	18.4%	15.7%	32.7%	23.1%
Oct-19	52.9%	26.5%	33.5%	54.6%	50.6%
Nov-20	23.4%	15.4%	18.5%	29.7%	24.2%
Nov-19	56.4%	23.5%	37.0%	50.4%	51.8%
Dec-20	26.1%	21.5%	27.7%	43.0%	30.2%
Dec-19	51.1%	39.2%	41.6%	56.9%	51.3%

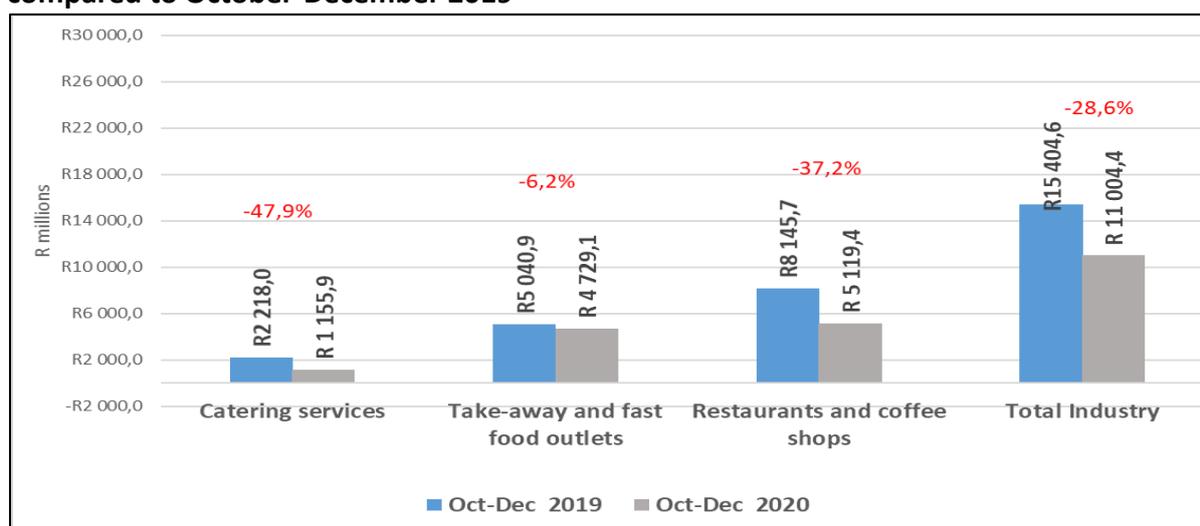
Source: Stats SA: Tourist Accommodation data cuts, 22nd February 2021

2.2 FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: OCTOBER-DECEMBER 2020 COMPARED TO OCTOBER-DECEMBER 2019

The total income of the food and beverages industry for the period October-December 2020 compared to same period of the previous year is shown in figure 3 below. The total income of the food and beverages industry was about R 11 004,4 million in October-December 2020, recording a decrease of -28.6% when compared to income of about R15 404,6 million during the same period in 2019. All categories of food and beverages industry experienced a decline, with the highest negative growth seen in catering services (-47.9%), followed by restaurants and coffee shops (-37.2%) and take-away and fast food outlets (-6.2%).

Figure 3: Total income by type of food and beverages industry: October-December 2020 compared to October-December 2019



Source: Stats SA: Food and Beverages data cuts, 22nd February 2020

Table 8 provides growth in total income for the different categories of the food and beverages industry. Comparing month on month performance of 2020 with that of 2019, 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 November and December 2020 were also recorded, however, there was a slight improvement in October 2020 when compared to the same month in 2019.

Table 8: Change in income by food and beverage type for October, November and December 2020 over 2019

Food and Beverages categories	Oct 2020 vs Oct 2019	Nov 2020 vs Nov 2019	Dec 2020 vs Dec2019
Catering services	-50.4%	-48.6%	-44.2%
Take-away and fast food outlets	9.3%	-15.5%	-10.4%
Restaurants and coffee shops	-50.3%	-27.1%	-35.3%
Total	-30.9%	-26.8%	-28.2%

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

2.3 AIRLINE INDUSTRY: PASSENGERS MOVEMENT

2.3.1 PASSENGER ARRIVALS MOVEMENT: OCTOBER-DECEMBER 2020 COMPARED TO OCTOBER-DECEMBER 2019

Table 9 shows the total passenger arrivals in Airports Company South Africa (ACSA) airports during October-December 2020 compared to October-December 2019. Total passenger arrivals decreased by -64.5%, from 5 688 763 in October-December 2019 to 2 018 598 during the same months in 2020. International passengers arriving during October-December 2020 declined by -85.4% compared to the same period in 2019. The number of domestic passengers also decreased by -55.6%, from 3 967 389 in October-December 2019 to 1 763 019 in October-December 2020. Passengers arriving on unscheduled flights recorded a decrease of -25.4%. Table 9.1 also provides the percentage growth by month for Oct-Dec 2020 compared to the same period in 2019 for the different categories of arriving passengers (international, regional, domestic and unscheduled) to South Africa.

Table 9: Arriving passengers to South Africa by region October-December 2020 compared to October-December 2020

Arriving Passengers	OCT-DEC 2019	OCT-DEC 2020	Difference	% Change
International	1 569 871	228 527	-1 341 344	-85.4%
Regional	135 860	15 375	-120 485	-88.7%
Domestic	3 967 389	1 763 019	-2 204 370	-55.6%
Unscheduled	15 643	11 677	-3 966	-25.4%
Total	5 688 763	2 018 598	-3 670 165	-64.5%

Source: ACSA data, December 2020

Table 9.1: Year on year % Change by month for arriving passengers: 2020 compared to 2019

MONTH	International	Regional	Domestic	Unscheduled	Total
October	-91.6%	-97.5%	-64.0%	-27.9%	-72.5%
November	-86.0%	-87.9%	-57.0%	-18.7%	-65.4%
December	-79.2%	-79.5%	-46.6%	-29.0%	-56.3%

Source: ACSA data, December 2020

2.3.2 PASSENGER DEPARTURE MOVEMENTS: OCT-DEC 2020 COMPARED TO OCT-DEC 2019

Table 10 below shows the total passengers departing from ACSA airports during the period October-December 2020 compared to October-December 2019. Total passengers departing from the country decreased by -64.8% in October-December 2020 compared to same period in 2019. The number of regional, international 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 -86.9% and -87.9% respectively during the period under review. Departing domestic passengers declined by -55.3%, from 3 952 126 during October-December 2019 to 1 766 101 in October-December 2020. The number of passengers on unscheduled flights during this period decreased by -26.2%. Table 10.1 also provides the percentage growth by month for 2020 compared to 2019 for the different categories of departing passengers (international, regional, domestic and unscheduled) in South Africa.

Table 10: Departing passengers from South Africa by region: October-December 2020 compared to October-December 2020

Departing Passengers	OCT-DEC 2019	OCT-DEC 2020	Difference	% Change
International	1 588 512	207 997	-1 380 515	-86.9%
Regional	132 706	16 109	-116 597	-87.9%
Domestic	3 952 126	1 766 101	-2 186 025	-55.3%
Unscheduled	14 851	10 966	-3 885	-26.2%
Total	5 688 195	2 001 173	-3 687 022	-64.8%

Source: ACSA data cuts, December 2020

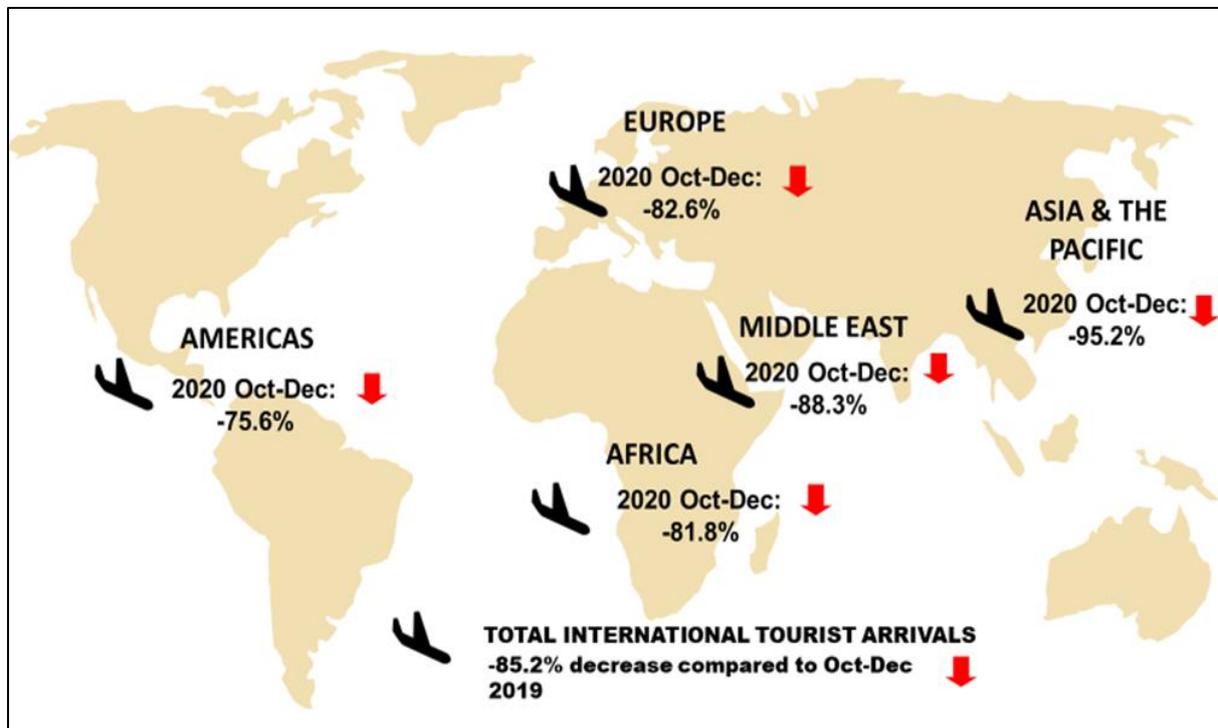
Table 10.1: Year % Change by month for departing passengers: 2020 compared to 2019

MONTH	International	Regional	Domestic	Unscheduled	Total
October	-90.9%	-97.4%	-63.8%	-20.6%	-71.7%
November	-88.4%	-87.2%	-57.1%	-32.6%	-66.5%
December	-82.4%	-77.9%	-45.9%	-25.4%	-57.2%

Source: ACSA data cuts, December 2020

SECTION 3 GLOBAL TOURISM PERFORMANCE: INTERNATIONAL TOURIST ARRIVALS BY REGION

Figure 4: percentage growth of global tourist arrivals by region: October-December 2020 compared to October-December 2019



Source: UNWTO Barometer January 2021 Volume 19: Issue 1

The UNWTO has only released percentage growth by region for October-December 2020 compared to October-December 2019 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 October-December 2020. Globally, total international tourist arrivals declined by -85.2% compared to the same period last year. Asia and the Pacific had the highest decrease (-95.2%) followed by Middle East (-88.3%), Europe (-82.6%), Africa (-81.8%) and Americas (-75.6%).

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ANNEXURE 1: ANALYSIS OF TOURIST ARRIVALS AND TOURISM RELATED INDUSTRIES FOR JANUARY-DECEMBER 2020 COMPARED TO JANUARY-DECEMBER 2019

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR DECEMBER 2020

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 December 2020, South Africa was still under lockdown level one from the 01st December to the 28th December 2021 and moved to adjusted alert level three from 29th December 2021 to date. Adjusted alert level 3 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 December 2020, and this report provides a further analysis of total tourists for the period Jan-December 2020. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for Jan-December 2020 compared to Jan-December 2019 is also provided in this report.

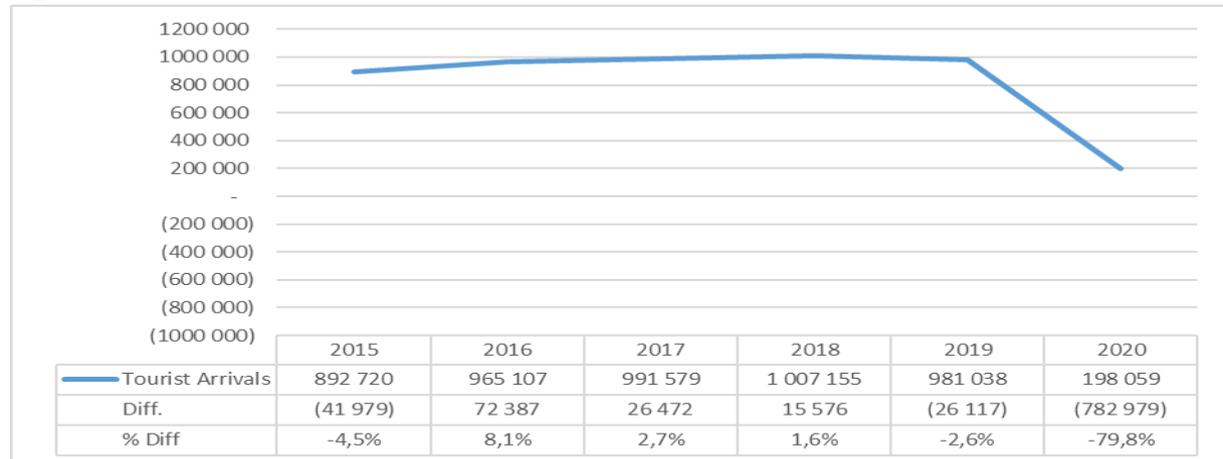
TREND ANALYSIS: DECEMBER 2015 – DECEMBER 2020

A total of 198 059 tourist arrivals was recorded in December 2020, which was a decrease of -79,8% (-782 979) compared to the same month in 2019. The decline experienced could be as a result of the lockdown in South Africa.

Figure 1 below also indicates tourist arrivals for the period December 2015 to December 2020. Tourist arrivals increased from 892 720 in 2015 to 965 107 in 2016 which was an increase of

8,1% (72 387). Tourist arrivals further increased from 965 107 in 2016 to 991 579 in 2017, which was an increase of 2,7% (26 472). Tourist arrivals continued to increase by 1,6% (15 576) in December 2018 compared to the same month in 2017. Comparing December 2019 with December 2018, there was a decrease of -2,6% (-26 117) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals December 2015 to December 2020



Source: Stats SA Tourism and Migration report, December 2020 and tourist arrivals data cuts

DECEMBER 2020 COMPARED TO DECEMBER 2019 BY REGION

Table 1 below indicates tourist arrivals by region for December 2020 compared to the same month in 2019. All regions experienced a decline in tourist arrivals during this month compared to the same month of the previous year. Australasia recorded the highest decrease of -95,8% (-13 641) which was influenced by Australia having a decline of -95,8% (-11 065) in tourist arrivals during this month. Africa also recorded a decrease of -77,7% (-561 587) and this region remains the main source of tourist arrivals to the country, accounting for 81,5% (161 358) of total tourist arrivals during this month.

Table 1: Total Tourist Arrivals by Region: December 2020 vs. December 2019

Region	DECEMBER 2020	DECEMBER 2019	Diff	% Diff.
EUROPE	26 880	163 335	-136 455	-83,5%
NORTH AMERICA	4 665	39 434	-34 769	-88,2%
CENTRAL & SOUTH AMERICA	591	12 706	-12 115	-95,3%
AUSTRALASIA	601	14 242	-13 641	-95,8%
MIDDLE EAST	748	3 822	-3 074	-80,4%
ASIA	2 872	23 257	-20 385	-87,7%
TOTAL OVERSEAS	36 357	256 796	-220 439	-85,8%
AFRICA	161 358	722 945	-561 587	-77,7%
Unspecified	344	1 297	-953	-73,5%
GRAND TOTAL	198 059	981 038	-782 979	-79,8%

Source: Stats SA Tourism and Migration Report, December 2020 and tourist arrivals data cuts

Table 1.1: South Africa's Top 10 African Source Markets: December 2020 vs. December 2019

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
Zimbabwe	1	59 951	1	218 236	-72,5%
Mozambique	2	35 856	3	112 846	-68,2%
Lesotho	3	18 592	2	133 133	-86,0%
Eswatini	4	13 260	5	87 227	-84,8%
Namibia	5	7 769	6	21 993	-64,7%
Botswana	6	7 493	4	87 374	-91,4%
Zambia	7	5 708	8	14 815	-61,5%
Malawi	8	4 986	7	19 229	-74,1%
DRC	9	1 449	11	3 755	-61,4%
Tanzania	19	1 147	10	3 937	-70,9%

Source: Stats SA Tourism and Migration Report, December 2020

Table 1.2: South Africa's Top 10 Overseas Source Markets: December 2020 vs. December 2019

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
UK	1	8 567	1	52 631	-83,7%
Germany	2	4 909	2	33 795	-85,5%
USA	3	3 871	3	32 895	-88,2%
France	4	2 443	5	12 218	-80,0%
The Netherlands	5	2 031	4	13 311	-84,7%
Switzerland	6	1 299	13	5 686	-77,2%
Belgium	7	1 261	14	4 732	-73,4%
India	8	939	9	7 058	-86,7%
Canada	9	794	10	6 539	-87,9%
Russian Federation	10	758	23	2 013	-62,3%

Source: Stats SA Tourism and Migration Report, December 2020

JANUARY-DECEMBER 2020 COMPARED TO JANUARY-DECEMBER 2019

Tourist arrivals figures by region for the period January-December 2020 compared to the same period in 2019 are indicated in Table 2 below. Total tourist arrivals (2 802 320) went down by - 72.6% (--7 426 273) for the period January-December 2020 compared the same period in 2019 (10 228 593). The decline is due to the national lockdown which prevented tourists from entering the country during the months of April-September in 2020.

Table 2: Total Tourist Arrivals by month: 2020 compared to 2019

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan-Dec Total	% Diff
2020	1 093 268	800 815	535 094	0	0	0	0	0	0	73 988	101 096	198 059	2 802 320	- 72,6%
2019	1 068 190	797 181	838 696	903 059	753 517	734 554	790 187	896 978	780 381	834 275	850537	981 038	10 228 593	

Source: Stats SA Tourism and Migration data January – December 2020

Total tourist arrivals from the overseas market decreased by -74,7% (-1 951 129). Asia (-81,5%) recorded the highest decrease followed by Australasia (-80.8%), North America (-79.7%), Middle East (-77.7%), Central and South America (-74,8%) and Europe with a decrease of -71.3%. Tourist arrivals from Africa decreased by -71.9% (-5 463 319) during the same period under review.

Table 3: Total Tourist Arrivals by Region Jan-Dec 2020 vs. Jan-Dec 2019

Region	Jan-December 2020	Jan-December 2019	Diff	% Diff
EUROPE	446 653	1 556 452	-1 109 799	-71,3%
NORTH AMERICA	89 504	440 271	-350 767	-79,7%
CENTRAL & SOUTH AMERICA	30 368	120 380	-90 012	-74,8%
AUSTRALASIA	24 651	128 153	-103 502	-80,8%
MIDDLE EAST	12 399	55 532	-43 133	-77,7%
ASIA	57 455	311 371	-253 916	-81,5%
TOTAL OVERSEAS	661 030	2 612 159	-1 951 129	-74,7%
TOTAL AFRICA	2 137 524	7 600 843	-5 463 319	-71,9%
Unspecified	3 766	15 591	-11 825	-75,8%
GRAND TOTAL	2 802 320	10 228 593	-7 426 273	-72,6%

Source: Stats SA Tourism and Migration data January – December 2020

Table 4 below gives the rankings of the top ten African source markets for the period January to December 2020 compared to January to December 2019. Most of the top ten African source markets remained at the same position for the period under review except for Tanzania moving up from 11th position in 2019 to 10th position in 2020 removing Nigeria from the top 10. All of the top ten countries recorded a decline. Botswana recorded the highest decline of -80,6% followed by Eswatini (-76.6%), Angola (-75.1%), Malawi (-73.2%), Lesotho (-71.3%), Tanzania (71.3%), Namibia (70,4%), Zimbabwe (-69.7%), Zambia (-69.4%) and Mozambique with -68.3%.

Table 4: South Africa's Top 10 African Source Markets: Jan-Dec 2020 vs. Jan-Dec 2019

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
Zimbabwe	1	684 546	1	2 258 794	-69,7%
Lesotho	2	448 745	2	1 563 448	-71,3%
Mozambique	3	422 537	3	1 333 195	-68,3%
Eswatini	4	214 947	4	917 631	-76,6%
Botswana	5	129 467	5	668 315	-80,6%
Malawi	6	53 365	6	199 079	-73,2%
Namibia	7	54 511	7	184 431	-70,4%
Zambia	8	46 486	8	152 064	-69,4%
Angola	9	15 443	9	61 995	-75,1%
Tanzania	10	10 977	11	38277	-71,3%

Source: Stats SA Tourism and Migration data January – December 2020

Table 5 shows the rankings of the top ten overseas source markets. Comparing January to December 2020 with January to December 2019, all of the top 10 overseas markets recorded a decrease in tourist arrivals. Despite this decline, fewer of the top ten overseas markets remained in the same position for the period under review except for Brazil moving up from 9th position in 2019 to 7th position in 2020. Canada also moved from 10th position in 2019 to 9th position in 2020 and Switzerland moved from 12th position in 2019 to 10th position in 2020, Germany moved from 3rd position in 2019 to 2nd position in 2020. However, USA moved down from 2nd position in 2019 to 3rd position in 2020. As well as India moved down from 7th position in 2019 to 8th position in 2020. UK remains the main source market from overseas recording a decline in growth of -69.7%.

Table 5: South Africa's Top 10 Overseas Source Markets: Jan-Dec 2020 vs. Jan-Dec 2019

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
UK	1	132 384	1	436 559	-69,7%
Germany	2	106 092	3	322 720	-67,1%
USA	3	71 959	2	373 694	-80,7%
France	4	41 023	4	165 038	-75,1%
The Netherlands	5	35 026	5	144 071	-75,7%
Australia	6	20 720	6	111 439	-81,4%
Brazil	7	19 388	9	77 261	-74,9%
India	8	18 892	7	95 621	-80,2%
Canada	9	17 545	10	66 577	-73,6%
Switzerland	10	15 697	12	55432	-71,7%

Source: Stats SA Tourism and Migration data January – December 2020

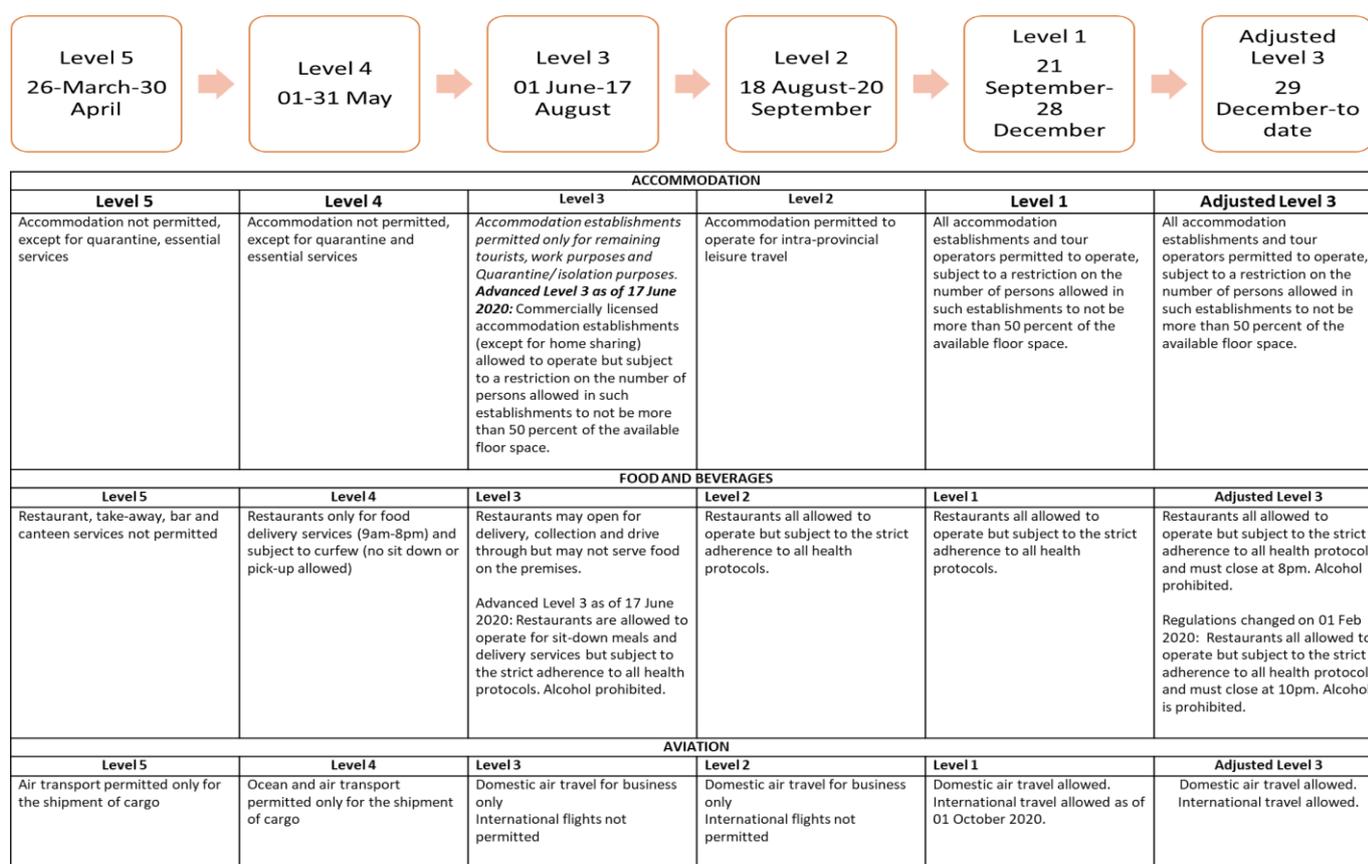
SECTION TWO: PERFORMANCE OF SOUTH AFRICA’S TOURISM RELATED INDUSTRIES: DECEMBER 2020 COMPARED TO DECEMBER 2019

The next section of the report is about the performance of tourism related industries during December 2020 compared to December 2019.

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. The figure below provides a summary of the different lockdown regulations for the accommodation, food and beverage and aviation industries under level 5-1 which was implemented during the months of March-December 2020. The performance of the tourism related industries therefore should be viewed within the context of South Africa’s COVID-19 lockdown regulations.

Figure 2: South Africa COVID-19 regulation for the key tourism related industries



Source: infographic was developed using information from <https://www.gov.za/coronavirus>

2.1 ACCOMMODATION INDUSTRY: 2020 compared to 2019

ACCOMMODATION INDUSTRY INCOME: JAN-DEC 2020 COMPARED TO JAN-DEC 2019

Table 6 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 January to December 2020 compared to January to December 2019. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During January to December 2020, the total income (current prices) from the accommodation industry recorded a decline of -61,3% compared to January to December 2019. Total income from all categories recorded a decline with total income from hotels recording the highest decline of about -62.4% moving from R38 099,2 million in January to December 2019 to R14 338,4 million in January to December 2020.

Table 6: Income from accommodation (current prices): Jan-Dec 2020 compared to Jan-Dec 2019

Type of Accommodation	Jan-Dec 20				Jan-Dec 2019				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other income	Total income	Jan-Dec 2020 compared to Jan-Dec 2019
Hotels (R million)	R2 632,70	R6 173,9	R5 531,80	R14 338,4	R6 645,4	R16 574,8	R14 879,0	R38 099,2	-62,4%
Caravan parks and camping sites (R million)	R2,7	R130,2	R2,1	R135,0	R11,2	R277,2	R11,3	R299,7	-55,0%
Guest houses and guest farms (R million)	R59,8	R393,7	R24,1	R477,6	R118,0	R1 025,9	R59,5	R1 203,4	-60,3%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R446,3	R3 129,6	R334,4	R3 910,3	R1 045,1	R7 407,2	R623,2	R9 075,5	-56,9%

Type of Accommodation	Jan-Dec 20				Jan-Dec 2019				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	Jan-Dec 2020 compared to Jan-Dec 2019
Total Industry - (R million)	R3 141,50	R9 827,4	R5 892,4	R18 861,3	R7 819,7	R25 285,1	R15 573,0	R48 677,8	-61,3%

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

Table 7 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went down by -61,1% during the same period under review. All categories of accommodation recorded a decline in income levels with hotels recording the highest decline of -62,8%; followed by guest houses and guest farms (-61,6%), other accommodation (-57,7%) and caravan parks and camping sites (-53,0%).

Table 7: Income from Accommodation (Excluding restaurants, bar sales and other income Jan-Dec 2020 compared to Jan-Dec 2019

Type of Accommodation	Jan-Dec 2020 Accommodation only	Jan-Dec 2019 Accommodation only	% Change Jan-Dec 2020 compared to Jan-December 2019
Hotels (R million)	R6 173,9	R16 574,8	-62,8%
Caravan parks and camping sites (R million)	R130,2	R277,2	-53,0%
Guest houses and guest farms (R million)	R393,7	R1 025,9	-61,6%
Other accommodation (R million)	R3 129,6	R7 407,2	-57,7%
Total Industry – (R million)	R9 827,4	R25 285,1	-61,1%

Source: Stats SA: Accommodation data cuts, 22th February 2021

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) from January to December 2020 is provided in table 8 below. Income from accommodation recorded an increase of 4,7% and 8,1% during January and February 2020 respectively compared to the same months in 2019. This was an improvement compared to the decline recorded during the same months in 2019 compared to 2018.

Income from accommodation recorded a decline from March to December 2020 compared to the same months in 2019. The highest decline was recorded in May (-98,1%) and April (-98,0%) 2020 compared to the same months in 2019. Although the income from accommodation continued to record a decline in December 2020 compared to the same month in 2019, the declines recorded have been decreasing since April 2020 except in November 2020 where the decline recorded was -66,2% which was less than the decline recorded in October 2020 (-66,4%). The improvement in the declines recorded could be due to regulations being relaxed during this period.

Table 8: Year on Year Change in income from Accommodation

MONTH	2019	2020
January	-3,4%	4,7%
February	-3,2%	8,1%
March	0,2%	-41,7%
April	2,7%	-98,0%
May	3,1%	-98,1%
June	7,2%	-94,2%
July	2,8%	-91,0%
August	4,7%	-82,5%
September	7,4%	-73,2%
October	1,8%	-66,4%
November	-0,6%	-66,2%
December	1,0%	-51,5%

Source: Stats SA: Accommodation Report December 2020

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JAN-DECEMBER 2020 COMPARED TO JAN-DECEMBER 2019

Table 9 below indicates occupancy rates by accommodation type from January to December 2020 compared to the January to December 2019. The total accommodation occupancy rate recorded in January to December 2020 was 20,1% which was a decline compared to 48,3% in January to December 2019. The occupancy rate of all accommodation establishments was at its lowest from March to December 2020 compared to the same months in 2019. The lowest occupancy rate was recorded May 2020 (1,2%) and in April (1,4%) which could be due to the level five and four COVID-19 lockdown regulations during these months which prevented the accommodations establishments from operating except for quarantine and essential services. However, even if the occupancy rate was still low from June 2020, there was an improvement on month to month occupancy rate between June and December 2020 as indicated in the table below. This could be an indication of improvement when regulations were relaxed especially from June 2020.

Table 9: Occupancy Rate: Jan-December 2020 compared to Jan-December 2019 (Average % Rate)

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jan-20	46	26,3	39,1	46,8	44,7
Jan-19	45,9	27,4	40,9	45,3	44,4
Feb-20	53,9	25,6	37,9	48	49,8
Feb-19	54,4	26,1	44,1	48,3	50,7
Mar-20	30,5	25,3	25,1	32,9	30,4
Mar-19	51,6	31,1	40,5	51,7	49,8
Apr-20	1,7	0,3	0,8	1	1,4
Apr-19	48,9	29,3	33	48,7	46,7
May-20	1,3	0,3	0,3	1,2	1,2
May-19	44,8	29,9	30,1	43,5	42,6
Jun-20	4,1	0,3	1,3	3,9	3,6
Jun-19	47,1	32,8	32,4	47,6	45,5
Jul-20	6,1	0,2	3,9	5,1	5,4
Jul-19	46,9	29,3	32,9	50	45,8
Aug-20	9,3	5,3	3,9	13,8	9,8
Aug-19	49,2	29,8	32,9	53,2	48
Sep-20	15,6	17,6	8,8	25,4	17,7
Sep-19	54,2	32,1	35	55	51,9
Oct-20	20,5	18,4	15,7	32,7	23,1
Oct-19	52,9	26,5	33,5	54,6	50,6
Nov-20	23,4	15,4	18,5	29,7	24,2
Nov-19	56,4	23,5	37	50,4	51,8
Dec-20	26,1	21,5	27,7	43	30,2
Dec-19	51,1	39,2	41,6	56,9	51,3
Jan-Dec 20	19,9	13,0	15,3	23,6	20,1
Jan-Dec 19	50,3	29,8	36,2	50,4	48,3

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

2.2 FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JAN-DEC 2020 COMPARED TO JAN-DEC 2019

The results in Table 10 indicates that the total income of the food and beverages industry in January to December 2020 was about R 33 706,6 million, which was a decrease of -40,5% when compared to R 56 626,6 million in January to December 2019. All of the food and beverages industries showed a decline in income with restaurants and coffee shops having the highest decrease of -50,2% followed by catering services with -47,8% and take-away and fast food outlets with -21,4%.

Table 10: Total income by type of food and beverage industry: January-December 2020 compared to January-December 2019

Categories of Food and Beverages	Jan-Dec 20	Jan-Dec 19	% Change
Catering services (R million)	4 426,4	8 473,5	-47,8%
Take-away and fast food outlets (R million)	14 477,9	18 411,1	-21,4%
Restaurants and coffee shops (R million)	14 802,3	29 742	-50,2%
Total Industry (R million)	33 706,6	56 626,6	-40,5%

Source: Stats SA: Food and beverages data cuts, 22th February 2021

Table 11: Year on Year Change in income total food and beverage industry income

MONTH	2019	2020
January	9,9%	6,9%
February	10,5%	5,2%
March	14,8%	-27,9%
April	5,2%	-95,6%
May	10,5%	-86,3%
June	8,8%	-58,5%
July	1,5%	-49,6%
August	5,1%	-42,8%
September	4,1%	-38,1%
October	2,4%	-30,0%
December	4,9%	-26,3%
December	5,8%	-27,5%

Source: Stats SA: Food and Beverage Report December 2020

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: JAN-DEC 2020 COMPARED TO JAN-DEC 2019

Table 12 gives the total passenger arrivals at Airports Company South Africa (ACSA) airports during January-December 2020 compared to January- December 2019. Total passenger arrivals decreased by -66,0%, from 21 429 817 in January-December 2019 to 7 296 351 in January-December 2020. The number of domestic passengers recorded in January-December 2020 were 5 649 023, which was a decrease of -62,1%, compared to 14 896 859 passengers in January-December 2019. Table 13 further provides the percentage growth by month for 2020 compared to 2019 for the different categories of passenger arrivals (international, regional, domestic and unscheduled) to South Africa.

Table 12: Arriving Passengers: Jan-Dec 2020 compared to Jan-Dec 2019

Arriving Passengers	Jan-Dec 2020	Jan-Dec 2019	% Change Jan-Dec 2020 compared to Jan-Dec 2019
International	1 478 090	5 925 407	-75,1%
Regional	108 902	551 093	-80,2%
Domestic	5 649 023	14 896 859	-62,1%
Unscheduled	60 336	56 458	6,9%
Total	7 296 351	21 429 817	-66,0%

Source: ACSAs data cuts, December 2020

Table 13: Year on Year % Change by month for arriving passengers: 2020 compared to 2019

MONTH	International	Regional	Domestic	Unscheduled	Total
January	2,6%	-5,2%	8,6%	29,1%	6,4%
February	-0,5%	-6,4%	6,8%	-7,8%	4,4%
March	-51,1%	-51,6%	-42,0%	-20,0%	-44,5%
April	-99,9%	-99,9%	-100,0%	-9,4%	-99,7%
May	-99,9%	-100,0%	-100,0%	-8,2%	-99,7%
June	-100,0%	-100,0%	-96,7%	50,0%	-97,3%
July	-99,9%	-100,0%	-91,4%	-8,6%	-93,9%
August	-99,9%	-100,0%	-85,0%	45,1%	-89,2%
September	-100,0%	-100,0%	-73,9%	113,5%	-81,2%
October	-91,6%	-97,5%	-64,0%	-27,9%	-72,5%
November	-86,0%	-87,9%	-57,0%	-18,7%	-65,4%
December	-79,2%	-79,5%	-46,6%	-29,0%	-56,3%

Source: ACSAs data cuts, December 2020

PASSENGER DEPARTURE MOVEMENT: JAN-DEC 2020 COMPARED TO JAN-DEC 2019

Table 14 shows the total passenger departing from Airports Company South Africa (ACSA) airports during the period January to December 2020 compared to January to December 2019. Total departing passengers decreased by -65,8%, from 21 567 439 in January to December 2019 to 7 372 639 in January to December 2020. There were only 107 176 regional passengers departing from ACSA airports and 1 491 364 international passengers departed during January to December 2020. The table indicates that there were 5 673 768 domestic passengers departed in January to December 2020, which was a decline of -62,0% compared to 14 919 116 domestic travellers in January to December 2019. The number of passengers on unscheduled flights in December 2020 increased by 73,1%; increasing from 57 972 in January-December 2019 to 100 331 in January to December 2020. Table 13.1 also provides the percentage growth by month for 2020 compared to 2019 for the different categories of departing passengers (international, regional, domestic and unscheduled) to South Africa.

Table 14: Departing Passengers: Jan-Dec 2020 compared to Jan-Dec 2019

Departing Passengers	Jan-Dec 2020	Jan-Dec 2019	% Change Jan-Dec 2020 compared to Jan-Dec 2019
International	1 491 364	6 039 107	-75,3%
Regional	107 176	551 244	-80,6%
Domestic	5 673 768	14 919 116	-62,0%
Unscheduled	100 331	57 972	73,1%
Total	7 372 639	21 567 439	-65,8%

Source: ACSAs data cuts December 2020

Table 13.1: Year % Change by month for departing passengers: 2020 compared to 2019

MONTH	International	Regional	Domestic	Unscheduled	Total
January	1,0%	-5,8%	8,3%	17,9%	5,8%
February	0,0%	-8,1%	6,7%	-10,6%	4,5%
March	-40,8%	-56,6%	-41,5%	-14,6%	-41,6%
April	-99,9%	-99,9%	-100,0%	216,9%	-99,2%
May	-99,9%	-100,0%	-100,0%	20,0%	-99,6%
June	-99,9%	-100,0%	-96,7%	212,0%	-97,0%
July	-100,0%	-100,0%	-91,3%	120,9%	-93,1%
August	-100,0%	-100,0%	-84,9%	186,0%	-88,9%
September	-100,0%	-100,0%	-73,7%	176,2%	-80,9%
October	-90,9%	-97,4%	-63,8%	-20,6%	-71,7%
November	-88,4%	-87,2%	-57,1%	-32,6%	-66,5%
December	-82,4%	-77,9%	-45,9%	-25,4%	-57,2%

Source: ACSAs data cuts, December 2020

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