

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR AUGUST 2021

NOTE: To limit the spread of COVID-19 and prepare the health care sector, the South African government announced a 21-day national lockdown from 27 April 2020, which prevented the movement of people entering and leaving South Africa. 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, between 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 export specific cargo and permitted retail goods to neighbouring countries, which included all goods imported via South African ports of entry.

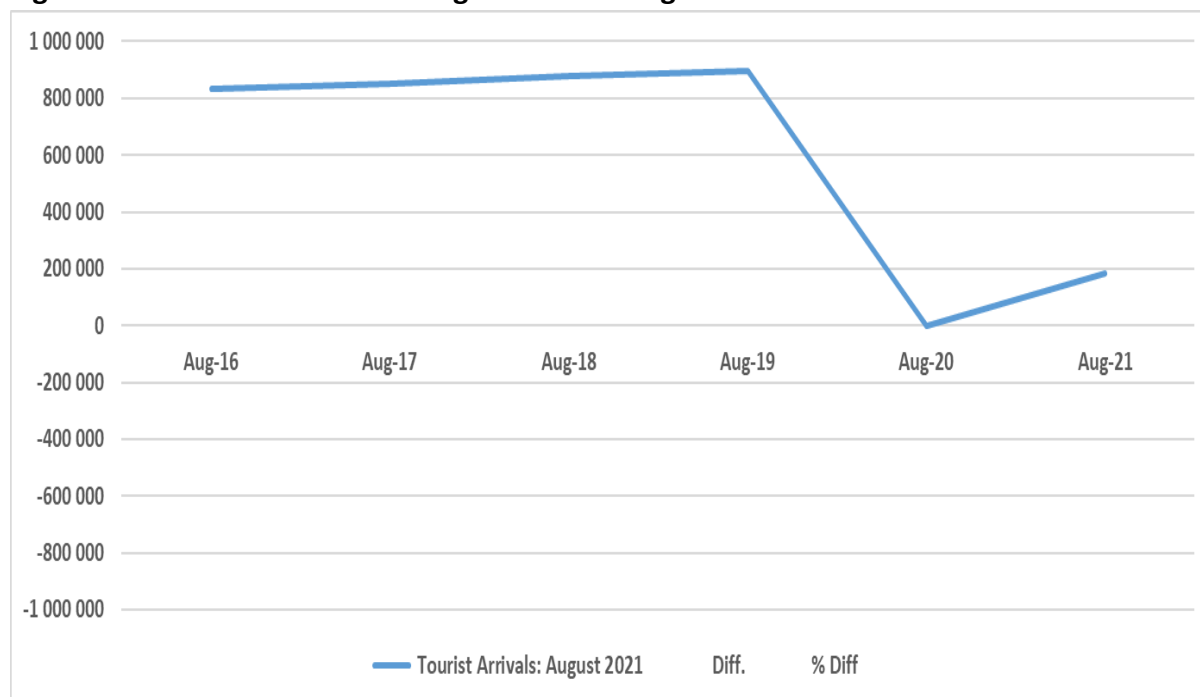
During August 2021, South Africa was under adjusted alert level 3, which allowed for international tourists to travel to the country subject to restrictions. These restrictions stipulated that all travellers visiting the country will be expected to abide by the regulations that include mandatory wearing 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 tourist arrivals during August 2021, and this report provides a further analysis of the tourists that travelled to South Africa during August 2021. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for August 2021 compared to August 2020 is also provided in this report.

TREND ANALYSIS: AUGUST 2016 – AUGUST 2021

A total of 185 637 tourist arrivals was recorded in August 2021. There were zero tourists recorded during August 2020 since the country was under lockdown level 4 which prevented tourists from entering the country.

Figure 1 below indicates tourist arrivals for the period August 2016 to August 2021. Tourist arrivals increased from 833 638 in 2016 to 852 339 in 2017, which was an increase of 2,2% (18 701). Tourist arrivals also increased in 2018 moving from 852 339 in 2017 to 876 926 in 2018, which was an increase of 2,9% (24 587). Tourist arrivals further increased by 2,3% (20 052) in August 2019 compared to the same month in 2018.

Figure 1: Total Tourist Arrivals August 2016 to August 2021



	Aug-16	Aug-17	Aug-18	Aug-19	Aug-20	Aug-21
Tourist Arrivals: August 2021	833 638	852 339	876 926	896 978	0	185 637
Diff.	102 390	18 701	24 587	20 052	(896 978)	-
% Diff	14,0%	2,2%	2,9%	2,3%	-100,0%	*1/

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

Source: Stats SA Tourism and Migration report, August 2021 and tourist arrivals data cuts

AUGUST 2021 TOURIST ARRIVALS BY REGION

A comparison between the movements in August 2020 and August 2021 have not been included in the table below as the country was under lockdown level 4 and only essential service providers were allowed to travel in August 2020. Table 1 below shows there was a total of 185 637 tourists recorded for August 2021. A total of 28 157 tourist were from the overseas regions. Africa recorded a total of 157 137 tourists for August 2021 and this region remains the main source of tourist arrivals to the country, accounting for 84,6% of total tourist arrivals during this month.

Table 1: Total Tourist Arrivals by Region: August 2021

Region	AUGUST 2021	% Share
EUROPE	12 586	6,8%
NORTH AMERICA	9 387	5,1%
CENTRAL & SOUTH AMERICA	851	0,5%
AUSTRALASIA	261	0,1%
MIDDLE EAST	1 371	0,7%
ASIA	3 701	2,0%
TOTAL OVERSEAS	28 157	15,2%

Region	AUGUST 2021	% Share
AFRICA	157 137	84,6%
Unspecified	343	0,2%
GRAND TOTAL	185 637	100,0%

Source: Stats SA Tourism and Migration Report, August 2021 and tourist arrivals data cuts

JANUARY-AUGUST 2021 COMPARED TO JANUARY-AUGUST 2020

Tourist arrivals figures by region for the period January-August 2021 compared to the period January-August 2020 are indicated in table 2 below. As mentioned above, for the month of August 2020 there were no tourists recorded due to COVID-19 lockdown level 4 regulations which prevented tourists from entering South Africa. Total tourist arrivals went down by -48,0% for the period January-August 2021 compared the period January-August 2020. This was a decline from a total of 2 429 177 tourist arrivals recorded during January-August 2020 to 1 263 163 (-1 166 014) during the period January-August in 2021. Total tourist arrivals from the overseas market decreased by -73,7% (-442 589). Australasia (-91,2%) recorded the highest negative growth followed by Central and South America (-84,3%), Europe (-81,4%), Asia (-50,5%), North America (-45,1%) and Middle East (-41,0%).

In Australasia, Australia had the highest decline in volume of -18 147 (-91,5%) followed by New Zealand (-3 270; -89,8%). In Central and South America, Brazil recorded the highest decline in volume (-16 479; -87,3%) for the period under review. The United Kingdom had the highest decline in volume (-106 401; -88,7%) in the Europe region. Tourist arrivals from Africa region decreased by -39,6% (-722 728) during the same period under review, and this decline in volume was driven by Zimbabwe (-335 782; -57,6%), followed by Lesotho (-200 510; -48,5%) and Eswatini (-87 361; -46,2%), refer to table 3 below.

Table 2: Total Tourist Arrivals by Region January-August 2021 vs. January-August 2020

Region	Jan-August 2021	Jan-August 2020 <i>(Month of April to August: 0 tourists recorded)</i>	Diff	% Diff
EUROPE	75 329	404 912	-329 583	-81,4%
NORTH AMERICA	45 077	82 173	-37 096	-45,1%
CENTRAL & SOUTH AMERICA	4 621	29 361	-24 740	-84,3%
AUSTRALASIA	2 073	23 520	-21 447	-91,2%
MIDDLE EAST	6 404	10 859	-4 455	-41,0%
ASIA	24 735	50 003	-25 268	-50,5%
TOTAL OVERSEAS	158 239	600 828	-442 589	-73,7%
TOTAL AFRICA	1 102 626	1 825 354	-722 728	-39,6%
Unspecified	2 298	2 995	-697	-23,3%
GRAND TOTAL	1 263 163	2 429 177	-1 166 014	-48,0%

Source: Stats SA Tourism and Migration Report, August 2021 and tourist arrivals data cuts

Table 3 below gives the rankings of the top ten African source markets for the period January-August 2021 compared to January-August 2020. Most of the top ten African source markets moved their positions except for Eswatini, which ranked in 4th position in Jan-August 2020 and Jan-August 2021. Mozambique, Namibia, Zambia, Tanzania and Nigeria all moved up their positions in 2021. Mozambique moved from the 3rd position during January-August 2020 to 1st position during the same period of the previous year,

Nigeria replaced Tanzania moving from the 11th position in January-August 2020 to 10th position in January-August 2021, whilst Tanzania replaced Angola moving from the 10th position to the 9th position. Zimbabwe moved from 1st position to 2nd position and Lesotho moved from 2nd position to 3rd position for the period under review. All of the top ten countries recorded a decline with Zimbabwe recording the highest negative growth of -57,6%, followed by Botswana (-54,5%) and Lesotho (-48,5%).

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

Country	Rank: Jan-August 2021	Tourist Arrivals Jan-August 2021	Rank: Jan-August 2020 <i>(Month of April to August: 0 tourists recorded)</i>	Tourist Arrivals Jan-August 2020	% Change from Jan-August 2020 to Jan-August 2021
Mozambique	1	314 788	3	345 026	-8,8%
Zimbabwe	2	246 912	1	582 694	-57,6%
Lesotho	3	213 214	2	413 724	-48,5%
Eswatini	4	101 587	4	188 948	-46,2%
Namibia	5	54 289	7	36 098	50,4%
Botswana	6	53 281	5	117 099	-54,5%
Zambia	7	40 363	8	31 659	27,5%
Malawi	8	31 109	6	43 325	-28,2%
Tanzania	9	7 509	10	8 459	-11,2%
Nigeria	10	7 126	11	8183	-12,9%

Source: Stats SA and tourist arrivals data cuts August 2021

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-August 2021 with January-August 2020, most of the top 10 overseas markets recorded a decrease in tourist arrivals except for Russia Federation and Pakistan which increased by 4,5% and 14,5% respectively. Majority of overseas source markets moved their positions except for Switzerland which ranked in 10th position. USA replaced UK as the main overseas source market despite experiencing a decline of -36,0%. In the Jan-August 2021 top ten list, Brazil, Australia and Canada were replaced by Russian Federation, Pakistan and China.

Table 4: South Africa's Top 10 Overseas Source Markets: January-August 2021 vs. January-August 2020

Country	Rank: Jan-August 2021	Tourist Arrivals Jan-August 2021	Rank: Jan-August 2020 <i>(Month of April to August: 0 tourists recorded)</i>	Tourist Arrivals Jan-August 2020	% Change from Jan-August 2020 to Jan-August 2021
USA	1	42 239	3	66 016	-36,0%
UK	2	13 498	1	119 899	-88,7%
Germany	3	12 286	2	98 333	-87,5%
India	4	9 141	8	17 113	-46,6%
France	5	8 143	4	37470	-78,3%
The Netherlands	6	6 597	5	32 030	-79,4%
Russian Federation	7	5 636	20	5392	4,5%
China	8	4 387	12	11516	-61,9%
Pakistan	9	3 844	29	3358	14,5%
Switzerland	10	3 211	10	13573	-76,3%

Source: Stats SA and tourist arrivals data cuts August 2021

PERFORMANCE OF SOUTH AFRICA'S TOURISM RELATED INDUSTRIES: AUGUST 2021 COMPARED TO AUGUST 2020

The next section of the report is about the performance of tourism related industries during August 2021 compared to August 2020.

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 June 2020, the South African government adopted the risk adjusted strategy, which aimed to increase economic activity while putting measures in place to reduce the transmission of the virus. As part of this approach, five (5) Coronavirus alert levels were introduced, mainly indicating the different sectors that can operate under these levels. For the month of August 2021, South Africa was under adjusted level 3 which was from 01 August- August 2021. During August 2020, South Africa was under lockdown level 3 and 2. The table below provides a summary of the lockdown regulations of the different levels 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 for the different lockdown restriction levels.

More information on the regulations can be sourced from the website: www.gov.za/coronavirus.

Table 5: South Africa COVID-19 level 3 and adjusted level 4 regulations for the accommodation, food and beverages and aviation industries

Accommodation	
Levels	Adjusted alert level 3
<p>Level 3: Accommodation establishments permitted only for remaining tourists, work purposes and Quarantine/ isolation purposes. Advanced Level 3 as of 17 June 2020: 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.</p> <p>Level 2: Accommodation permitted to operate for intra-provincial leisure travel</p>	<p>Adjusted Alert 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 is permitted.</p>
Food and Beverages	
Levels	Adjusted alert level 3
<p>Level 3: Restaurants may open for delivery, collection and drive through but may not serve food on the premises. Advanced Level 3 as of 17 June 2020: Restaurants are allowed to operate for sit-down meals and delivery services but subject to the strict adherence to all health protocols. Alcohol prohibited.</p> <p>Level 2: Restaurants all allowed to operate but subject to the strict adherence to all health protocols.</p>	<p>Adjusted Alert level 3: Restaurants all allowed to operate but subject to the strict adherence to all health protocols. Curfew was from 9pm-4am. Sale of alcohol is prohibited for on-site or off-site consumption.</p>
Aviation	
Levels	Adjusted alert level 3
<p>Level 3 and 2: Domestic air travel for business only. International flights not permitted</p>	<p>Adjusted alert level 3: International and domestic air travel allowed.</p>

Source: www.gov.za/coronavirus

2.1 ACCOMMODATION INDUSTRY: AUGUST 2021

ACCOMMODATION INDUSTRY INCOME: AUGUST 2021 COMPARED TO AUGUST 2020

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 August 2021 compared to August 2020. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During August 2021, the total income (current prices) from the accommodation industry recorded an increase of 83,3% compared to August 2020. Total income from all categories recorded an increase with total income from caravan parks and camping sites recording the highest increase of about 272,1% moving from R6,8 million in August 2020 to R25,3 million in August 2021. The increases recorded in all categories of accommodation in August 2021 could be related to the lockdown level 3 and 2 regulations in August 2020 which prevented the accommodation industry from operating in order to limit the spread of COVID-19.

Table 6: Income from accommodation (current prices: August 2021 compared to August 2020)

Type of Accommodation	August 2021				August 2020				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	August 2021 compared to August 2020
Hotels (R million)	R202,4	R405,1	R378,9	R986,4	R73,5	R161,7	R304,0	R539,2	82,9%
Caravan parks and camping sites (R million)	R0,5	R24,7	R0,1	R25,3	R0,0	R6,8	R0,0	R6,8	272,1%
Guest houses and guest farms (R million)	R4,3	R47,6	R1,5	R53,4	R1,3	R13,3	R0,5	R15,1	253,6%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R47,9	R411,9	R26,9	R486,7	R22,6	R224,2	R16,4	R263,2	84,9%
Total Industry - (R million)	R255,1	R889,3	R407,4	R1 551,8	R97,4	R406,0	R320,9	R824,3	88,3%

Source: Stats SA: August Accommodation data cuts and report, 19 October 2021

Table 7 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 119,0% during the same period under review. All categories of accommodation recorded an increase in income levels with caravan parks and camping sites recording the highest increase of 263,2%; followed by guest houses and guest farms (257,9%), hotels (150,5) and other accommodation (83,7%).

Table 7: Income from Accommodation (Excluding restaurants, bar sales and other income): August 2021 compared to August 2020

Type of Accommodation	August 2021 Accommodation only	August 2020 Accommodation only	% Change August 2021 compared to August 2020
Hotels (R million)	R405,1	R161,7	150,5%
Caravan parks and camping sites (R million)	R24,7	R6,8	263,2%
Guest houses and guest farms (R million)	R47,6	R13,3	257,9%
Other accommodation (R million)	R411,9	R224,2	83,7%
Total Industry – (R million)	R889,3	R406,0	119,0%

Source: Stats SA: August Accommodation data cuts and report, 19 October 2021

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) for January to August 2021 compared to January to August 2020 is provided in table 8 below. Income from accommodation recorded an increase of 119,0% during August 2021 compared to the same month in 2020. For April to July 2021, the results show an increase in income compared to the same months of the previous year.

Table 8: Year on Year Change in income from Accommodation January-August 2021 compared to January-August 2020

MONTH	2020	2021
January	5,3%	-70,9%
February	9,4%	-75,1%
March	-41,1%	-40,6%
April	-98,0%	2291,1%
May	-97,5%	1724,6%
June	-94,5%	653,5%
July	-92,0%	241,5%
August	-83,2%	119,0%

Source: Stats SA: August Accommodation Report, 18 October 2021

ACCOMMODATION INDUSTRY OCCUPANCY RATE: AUGUST 2021 COMPARED TO AUGUST 2020

Table 9 below indicates occupancy rates by accommodation type for the months of January and August 2021 compared same months in 2020. The total accommodation occupancy rate recorded in August 2021 was 21,6% which was an increase compared to 9,2% in August 2020. The occupancy rate of all accommodation establishments increased in August 2021 compared to same month of the previous year.

Table 9: Occupancy Rate by Month: January-August 2021 vs. January-August 2020

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jan-20	46%	30,7%	35,8%	44,6%	43,3%
Jan-21	14,3%	24,8%	12,8%	25,2%	18,2%
Feb-20	53,9%	29,9%	34,7%	45,7%	47,6%
Feb-21	16,3%	25,6%	13,3%	25%	19,4%
Mar-20	30,4%	29,5%	23%	31,3%	29,9%
Mar-21	21,6%	29,1%	13,8%	28,4%	23,5%
Apr-20	1,6%	0,4%	0,8%	0,9%	1,2%
Apr-21	24,6%	31,1%	15,4%	32,4%	26,6%
May-20	1,5%	0,3%	0,3%	1,4%	1,3%
May-21	22,5%	35,9%	14,5%	25,9%	23,8%
Jun-20	3,9%	0,3%	1,2%	3,4%	3,2%
Jun-21	19,4%	35,8%	14,6%	24,5%	21,8%
Jul-20	5,8%	0,6%	3,3%	5,1%	4,9%

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%
Aug-20	9%	6,4%	3,4%	12,3%	9,2%
Aug-21	20%	30,6%	13,4%	24,5%	21,6%

Source: Stats SA: August Accommodation data cuts, 18 October 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 August 2021 compared to August 2020 is provided in table 10 below. It is important to note that the STR hotel data information for August 2021 and August 2020 is from a sample of 217 hotels that is drawn from a census/population of 415 hotels.

There was an increase recorded in all hotel performance indicators in August 2021 compared to August 2020 with hotel occupancy rate increased by 37,4% in August 2021 compared to August 2020 moving from an occupancy rate of 23,0% in August 2020 to 31,6% in August 2021. The Average Daily Rate (ADR) for August 2021 was R1 019,70 which was an increase of 21,5% compared to R839,51 in August 2020. The Revenue Per available room also increased by 67,2% moving from R193,01 in August 2020 compared to R322,69 in August 2021.

Table 10: South Africa Hotel Performance: August 2021 compared to August 2020

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
21-Aug	31,6%	37,4%	R1 019,70	21,5%	R322,69	67,2%	415	217
20-Aug	23,0%		R839,51		R193,01			

Source: STR Hotel Data August 2021

2.2 FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: AUGUST 2021 COMPARED TO AUGUST 2020

The results in table 11 indicates that the total income for the food and beverages industry for August 2021 was about R4 540,2 million, which was an increase of 50,4% compared to R3 018,7 million in August 2020. All of the food and beverages industries showed an increase in income during the period under review.

Table 11: Total income at current prices by type of enterprise (R million): August 2021 compared to August 2020

Categories of Food and Beverages	August 21	August 20	% Change
Catering services (R million)	R627,1	R516,5	21,4%
Take-away and fast food outlets (R million)	R1 665,6	R1 289,3	29,2%
Restaurants and coffee shops (R million)	R2 247,5	R1 212,9	85,3%
Total Industry (R million)	R4 540,2	R3 018,7	50,4%

Source: Stats SA: August Food and beverages data cuts and reports, 18 October 2021

The monthly percentage change of income from the food and beverage industry for January and August 2021 compared to January and August 2020 is provided in table 12 below. Income from food and beverage industry recorded an increase of 50,4% during August 2021 compared to the same month in 2020. The table further indicates that there was also an increase recorded in April to August 2021 compared to April to August 2020.

Table 12: Year on Year Change in income from food and beverage industry: January-August 2021 compared to January-August 2020

MONTH	2020	2021
January	5,2%	-46,5%
February	4,0%	-35,1%
March	-30,3%	-4,0%
April	-94,5%	1 321,9%
May	-87,4%	545,7%
June	-65,8%	106,9%
July	-57,2%	43,1%
August	-52,3%	50,4%

Source: Stats SA: August Food and beverages data cuts and report, 18 October 2021

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: AUGUST 2021 COMPARED TO AUGUST 2020

Table 13 gives the total passenger arrivals at Airports Company South Africa (ACSA) airports during August 2021 compared to August 2020. Total passenger arrivals increased by 202,1% moving from 194 290 in August 2020 to 586 947 in August 2021. The increases recorded in most types of arriving passengers (international, regional, domestic except unscheduled) in August 2021 could be related to the lockdown 3 and 2 regulations which was implemented during August 2020 whereby South African borders were closed for travel and only returning South Africans from other countries were allowed entry into the country.

Table 13: Arriving Passengers: August 2021 compared to August 2020

Arriving Passengers	August 21	August 20	% Change
International	95 034	290	32670,3%
Regional	13 590	0	1/
Domestic	474 708	185 902	155,4%
Unscheduled	3 615	8 098	-55,4%
Total	586 947	194 290	202,1%

*1/ Changes from 0 in the preceding period cannot be calculated as a percentage

Source: ACSAs data cuts, August 2021

PASSENGER DEPARTURE MOVEMENT: AUGUST 2021 COMPARED TO AUGUST 2020

Table 14 shows the total passenger departing from Airports Company South Africa (ACSA) airports during August 2021 compared to August 2020. Total departing passengers increased by 190,5% from 203 820 in August 2020 to 592 082 in August 2021. All types of departing passengers recorded an increase during August 2021 compared to August 2020 except for Unscheduled passengers which decreased by -80,1%.

Table 14: Departing Passengers: August 2021 compared to August 2020

Departing Passengers	August 21	August 20	% Change
International	101 203	15	674586,7%
Regional	12 359	0	1/
Domestic	475 165	186 911	154,2%
Unscheduled	3 355	16 894	-80,1%
Total	592 082	203 820	190,5%

*1/ Changes from 0 in the preceding period cannot be calculated as a percentage

Source: ACSAs data cuts, August 2021

References:

1. Statistics South Africa October 26th 2021, August Tourism and Migration report.
2. Statistics South Africa, October 18th 2021, August Accommodation data cuts.
3. Statistics South Africa, October 18th 2021, August Food and Beverage data cuts.
4. Airports Company South Africa, August 2021. Data cuts.
5. STR Global RSA Hotel review data August 2021