

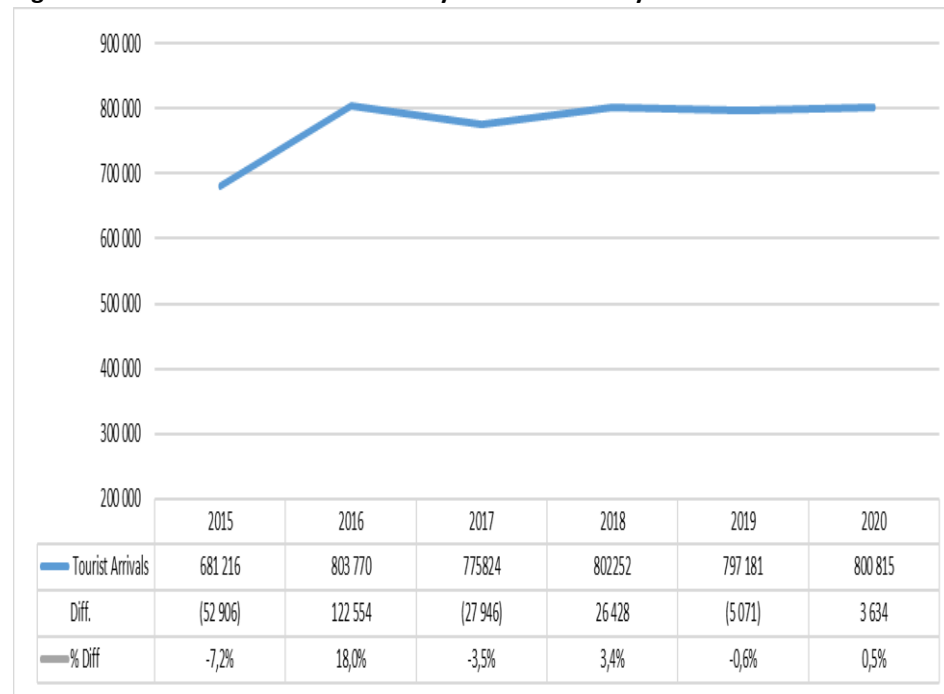
## SUMMARY ANALYSIS OF TOURIST ARRIVALS: FEBRUARY 2020

### TREND ANALYSIS: FEBRUARY 2015 - FEBRUARY 2020

A total of 800 815 tourist arrivals was recorded in February 2020, which was an increase of 0.5% (3 634) compared to the same month in 2019.

Figure 1 below indicates tourist arrivals for the period February 2015 to February 2020. Tourist arrivals increased from 681 216 in 2015 to 803 770 in 2016 which was an increase of 18.0% (122 554). Tourist arrivals decreased from 803 770 in 2016 to 775 824 in 2017, which was a decline of -3.5% (-27 946). Tourist arrivals increased by 3.4% (26 428) in February 2018 compared to the same month in 2017. Comparing February 2019 with February 2018, there was a decrease of -0.6% (-5 071) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals February 2015 to February 2020



Source: Stats SA Tourism and Migration report, February 2020 and Stats SA data set

### FEBRUARY 2020 COMPARED TO FEBRUARY 2019 BY REGION

Table 1 indicates tourist arrivals by region for February 2020 compared to the same month in 2019. Australasia recorded the highest increase with a growth of 15.6%, followed by Central and South America (11.8%), North America (9.3%), Middle East (4.8%) and Europe with 2.9%. The increase recorded in Australasia was influenced by New Zealand having a growth of 84.7% (618) in tourist arrivals during this month. Asia is the only region which recorded a decline of -33.3% (-8 609) during this period. Africa recorded a slight increase of 0.4% (1 931) and this region remains the main source of tourist arrivals to the country, accounting for 68.9% (551 376) of total tourist arrivals during this month.

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

Region	FEBRUARY 2020	FEBRUARY 2019	Diff	% Diff.
EUROPE	173 962	169 025	4 937	2,9%
NORTH AMERICA	32 806	30 016	2 790	9,3%
CENTRAL & SOUTH AMERICA	11 120	9 950	1 170	11,8%
AUSTRALASIA	8 607	7 447	1 160	15,6%
MIDDLE EAST	4 261	4 066	195	4,8%
ASIA	17 281	25 890	-8 609	-33,3%
TOTAL OVERSEAS	248 037	246 394	1 643	0,7%
AFRICA	551 376	549 445	1 931	0,4%
Unspecified	1 402	1 342	60	4,5%
GRAND TOTAL	800 815	797 181	3 634	0,5%

Source: Stats SA Tourism and Migration Report, February 2020

## JANUARY-FEBRUARY 2020 COMPARED TO JANUARY-FEBRUARY 2019

Tourist arrivals figures by region for the period January-February 2020 compared to the same period in 2019 are indicated in Table 2 below. Total tourist arrivals (1 894 083) went up by 1.5% (28 712) for the period January to February 2020 compared the same period in 2019 (1 865 371). Total tourist arrivals from the overseas market increased by 2.4% (11 321). Middle East (24.5%) recorded the highest increase followed by Central and South America (8.1%), North America (7.1%), Australasia (5.1%) and Europe with an increase of 3.4%. Tourist arrivals from Asia went down by -16.1%. The highest declining growth recorded in Asia was from China with a decline of -39.7% (-7 119) followed by South Korea (-29,3%). As already indicated, Middle East recorded the highest growth in tourist arrivals during this period under review. With regards to volume, the growth from Middle East was driven by an increase of 1 857 tourist arrivals from Saudi Arabia (194,0%) moving from a total of 957 to 2 814 for the period under review. Tourist arrivals from Africa increased by 1.2% (17 228) during the same period under review. In terms of volume, the increase recorded from the continent was driven by an increase of 4.9% (15 014) from Lesotho, followed by Botswana (10 445/13%) and Eswatini (5 462/4,1%).

**Table 2: Total Tourist Arrivals by Region Jan-Feb 2020 vs. Jan-Feb 2019**

Region	Jan-Feb 2020	Jan-Feb 2019	Diff	% Diff
EUROPE	331 770	320 958	10 812	3,4%
NORTH AMERICA	64 400	60 136	4 264	7,1%
CENTRAL & SOUTH AMERICA	23 687	21 911	1 776	8,1%
AUSTRALASIA	18 191	17 314	877	5,1%
MIDDLE EAST	9 495	7 628	1 867	24,5%
ASIA	43 044	51 319	-8 275	-16,1%
TOTAL OVERSEAS	490 587	479 266	11 321	2,4%
TOTAL AFRICA	1 401 074	1 383 846	17 228	1,2%
Unspecified	2 422	2 259	163	7,2%
GRAND TOTAL	1 894 083	1 865 371	28 712	1,5%

Source: Stats SA Tourism and Migration Report, February 2020.

Table 3 gives the rankings of the top ten African source markets for the period January-February 2020 compared to January-February 2019. All of the top ten African source markets remained at the same position for the period under review. Most of the top ten countries recorded a decline except for Botswana (13.0%), Lesotho (4.9%), Eswatini (4.1%) and Malawi with 0.2%. Angola recorded the highest decline (-21,0%) followed by Nigeria (-19,3%) and Zambia (-7,3%).

**Table 3: South Africa's Top 10 African Source Markets: Jan-Feb 2020 vs. Jan-Feb 2019**

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
Zimbabwe	1	452 020	1	453 897	-0,4%
Lesotho	2	318 611	2	303 597	4,9%
Mozambique	3	266 161	3	268 874	-1,0%
Eswatini	4	137 727	4	132 265	4,1%
Botswana	5	90 591	5	80 146	13,0%
Malawi	6	32 210	6	32 138	0,2%
Namibia	7	27 088	7	27 864	-2,8%
Zambia	8	23 337	8	25 185	-7,3%
Angola	9	11 296	9	14 291	-21,0%
Nigeria	10	6 433	10	7 974	-19,3%

Source: Stats SA Tourism and Migration Report, February 2020.

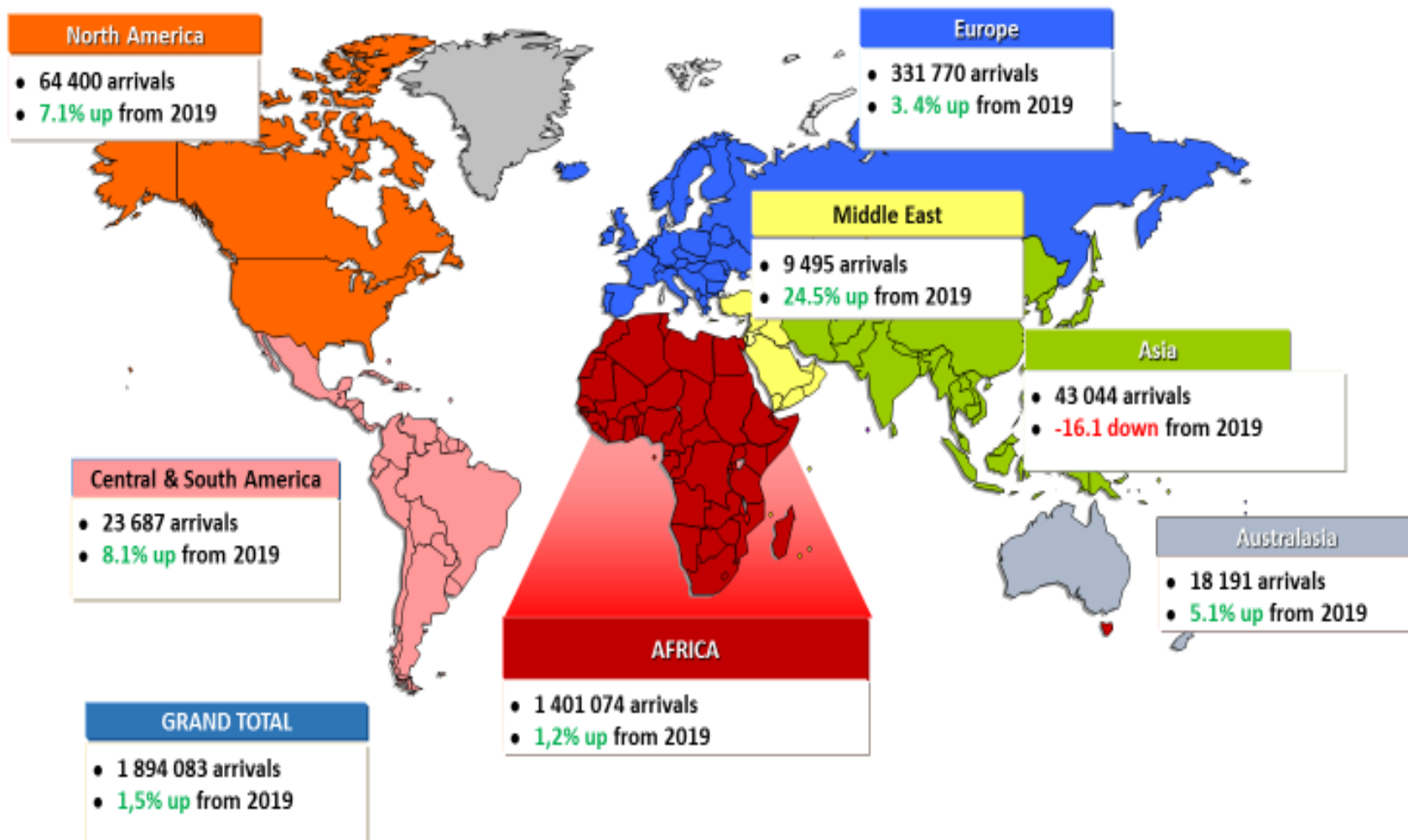
Table 4 shows the rankings of the top ten overseas source markets. Comparing January-February 2020 with January-February 2019, most of the top 10 overseas markets recorded an increase in tourist arrivals except for Sweden (-10.5%), France (-6.0%) and Australia with -1.9%. Despite this decline, most of the top ten overseas markets remained in the same position for the period under review except for Brazil moving up from 12<sup>th</sup> position in 2019 to 6<sup>th</sup> position in 2020 removing China from the top 10. Canada and Sweden exchanged position with Canada moving up from 10<sup>th</sup> position in 2019 to 9<sup>th</sup> position in 2020 while Sweden moved down from 9<sup>th</sup> position in 2019 to 10<sup>th</sup> position in 2020. UK remains the main source market from overseas recording a growth of 3.4%.

**Table 4: South Africa's Top 10 Overseas Source Markets: Jan-Feb 2020 vs. Jan-Feb 2019**

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
UK	1	100 080	1	96 758	3,4%
Germany	2	77 369	2	68 193	13,5%
USA	3	51 982	3	48 060	8,2%
France	4	28 994	4	30 841	-6,0%
The Netherlands	5	26 319	5	26 185	0,5%
Brazil	6	15 462	12	11 361	36,1%
Australia	7	15 381	7	15 676	-1,9%
India	8	14 437	8	13 519	6,8%
Canada	9	12 418	10	12 076	2,8%
Sweden	10	11 466	9	12 816	-10,5%











Source: Stats SA Tourism and Migration Report, February 2020.

ANNEXURE 1: TOTAL TOURIST ARRIVALS BY REGION FOR THE PERIOD JANUARY-FEBRUARY 2020 COMPARED TO JANUARY-FEBRUARY 2019













ANNEXURE 2: TOTAL TOURIST ARRIVALS BY REGION JANUARY-FEBRUARY 2020 COMPARED TO JANUARY-FEBRUARY 2019

**TOP FIVE OVERSEAS  
SOURCE MARKETS**

Country	Arrivals
UK 	100 080 3.4% up from 2019 
Germany 	77 369 13.5% up from 2019 
USA 	51 982 8.2% up from 2019 
France 	28 994 -6.0% down from 2019 
Netherlands 	26 319 0.5% Up from 2019 

**TOP FIVE AFRICA  
SOURCE MARKETS**

Country	Arrivals
Zimbabwe 	452 020 -0.4% down from 2019 
Lesotho 	318 611 4.9% up from 2019 
Mozambique 	266 161 -1.0% down from 2019 
Eswatini 	137 727 4.1% up from 2019 
Botswana 	90 591 13.0% up from 2019 

## ANNEXURE 3: AVIATION AND HOTEL DATA

### A. AIRPORTS COMPANY SOUTH AFRICA (ACSA): PASSENGER AND AIRCRAFT MOVEMENT

International passenger movement in ACSA airports slightly went down by -0,3% for the period February 2020 compared to the same month in 2019. However international aircraft movement went up by 3, 9% during the same month. Regional passenger and aircraft movement recorded a decline during January and February 2020 compared to same months in 2019. It should be noted that South African Airways cancelled some of the routes due to the restructuring programme during this period.

Table 5: Airports Company South Africa passenger and aircraft movement

<b>Passenger Movement</b>	Jan-19	Jan-20	%Change	Feb-19	Feb-20	% Change
International	1 064 106	1 083 344	1,8%	889 859	887 313	-0,3%
Regional	74 528	70 416	-5,5%	75185	69720	-7,3%
<b>Aircraft Movement</b>						
International	6 764	6 883	1,8%	6 086	6 321	3,9%
Regional	2 149	2 001	-6,9%	2127	1888	-11,2%

Source: ACSA, data as of 19 March 2020

### B. ESTIMATES OF PASSENGER MOVEMENTS AND BOOKINGS FROM FORWARDKEYS

The Department of Tourism has subscribed with ForwardKeys to monitor bookings of air passengers in order to do a trend analysis of air arrivals to the country. Estimates does not include land markets and it should be noted that different trends might be observed from countries that a driven by land arrivals when actual tourist arrivals to the country are released by Statistics South Africa. The data analysed in this section aims to compare the trend for the period January to February 2020 as well as to provide trend analysis of growth expected for March 2020 compared to the same month in 2019. It should be noted that these figures are based on actual passengers that have already travelled in the previous months but for the coming months, the estimates are based on bookings at the time when the data was downloaded. Although this can be used for trend analysis, it should be noted that passengers per route does not necessarily mean that they are from the country of departure whereas actual tourist arrivals figures released by Statistics South Africa is based on the country of residence. This analysis is based on the data downloaded on 4 April 2020 and it should be noted that latest data could not be downloaded as the license has expired. The Department has a sub-license under SA Tourism's agreement and it is awaiting SA Tourism to renew the main license.

#### South Africa's Top Ten Overseas Markets by Forwardkeys Passenger Movement

Table 6 below indicates that some overseas markets have been recording a decline in passenger movement to the country since the beginning of 2020. Passengers from China recorded a decline of -5.9% in January 2020 and a decline of -81,2% and -94,4% for February 2020 and March 2020 respectively. All markets recorded a decline in passenger movement to the country during March 2020.

**Table 6: SA's Top ten overseas market by Forwardkeys passenger Movement**

Top 10 countries 2019	Passenger Movement			Y-Y% Change		Passenger Movement			Y-Y% Change		Passenger Movement			Y-Y% Change	
	Jan-18	Jan-19	Jan-20	Jan-19	Jan-20	Feb-18	Feb-19	Feb-20	Feb-19	Feb-20	Mar-18	Mar-19	Mar-20	Mar-19	Mar-20
UK	25124	22444	25 485	-10,7%	13,5%	31078	28403	28203	-8,6%	-0,7%	30475	25120	9834	-17,6%	-60,9%
USA	12237	11642	12 416	-4,9%	6,6%	14789	12723	13159	-14,0%	3,4%	19583	18205	6563	-7,0%	-63,9%
Germany	21620	17340	17 048	-19,8%	-1,7%	26467	21211	22897	-19,9%	7,9%	28595	20283	9631	-29,1%	-52,5%
France	7998	6896	4 268	-13,8%	-38,1%	10298	8695	6513	-15,6%	-25,1%	12530	10245	4846	-18,2%	-52,7%
The Netherlands	6574	5974	5 150	-9,1%	-13,8%	7168	7205	6588	0,5%	-8,6%	5690	5576	2395	-2,0%	-57,0%
Australia	7321	5873	6 079	-19,8%	3,5%	5485	4903	5605	-10,6%	14,3%	7996	5879	2865	-26,5%	-51,3%
India	4244	4202	3 701	-1,0%	-11,9%	4964	4102	4300	-17,4%	4,8%	4049	4364	1188	7,8%	-72,8%
China	3104	4095	3 854	31,9%	-5,9%	4748	4149	781	-12,6%	-81,2%	3365	4229	236	25,7%	-94,4%
Brazil	6871	5964	7 687	-13,2%	28,9%	3588	3309	5397	-7,8%	63,1%	3637	4238	2617	16,5%	-38,2%
Italy	3531	2826	2 997	-20,0%	6,1%	3445	2949	2462	-14,4%	-16,5%	3151	2408	354	-23,6%	-85,3%

Source: ForwardKeys, data as of 04 April 2020

### South Africa's top ten overseas markets by Forwardkeys bookings

According to the table below, all overseas top ten markets indicates a decline in bookings for the coming six months compared to the bookings for the same period in 2019. China indicates the highest decline during the period under review. It should be noted that bookings might change closer to the time of travel and this data should be used with caution.

**Table 7: SA's Top ten overseas markets by Forwardkeys bookings**

No.	Top 10 Overseas Markets	Next Month		Next 3 Months		Next 6 Months	
		April 2020	Var%	Apr-Jun 20	Var%	Apr-Sept 20	Var%
1	United Kingdom	2 313	-90,5%	10 315	-73,3%	35 379	-48,2%
2	U.S.A.	2 871	-78,9%	20 443	-52,5%	44 338	-40,1%
3	Germany	1 385	-90,9%	5 911	-73,9%	25 667	-45,4%
4	France	689	-90,8%	2 818	-82,5%	9 771	-68,9%
5	Netherlands	1 126	-81,7%	3 768	-60,2%	20 539	-31,6%
6	Australia	952	-88,1%	5 016	-69,8%	5 016	-51,9%
7	India	293	-94,2%	3 395	-78,9%	3 712	-78,3%
8	China	86	-96,8%	347	-94,5%	612	-93,3%
9	Brazil	883	-73,0%	4 246	-42,1%	7 560	-36,7%
10	Italy	234	-93,8%	2 391	-69,5%	11 097	-51,7%

Source: ForwardKeys, data as of 04 April 2020

### South Africa's Top Ten African Markets by Forwardkeys Passengers

According to the table below, most of the top ten African source markets have been recording a decline in passenger movement to the country since the beginning of 2020. All countries recorded a decline in passenger movement for March 2020 compared to the same month in 2019. For February 2020 compared to the same month in 2019, Mozambique, Swaziland, Botswana and Angola recorded an increase in passengers.

**Table 8: South Africa's Top ten African markets by Forwardkeys passengers**

Top 10 countries 2019	Passenger Movement			Y-Y% Change		Passenger Movement			Y-Y% Change		Passenger Movement			Y-Y% Change	
	Jan-18	Jan-19	Jan-20	Jan-19	Jan-20	Feb-18	Feb-19	Feb-20	Feb-19	Feb-20	Mar-18	Mar-19	Mar-20	Mar-19	Mar-20
Zimbabwe	3834	5240	3 255	36,7%	-37,9%	4562	6272	3979	37,5%	-36,6%	5600	4388	1720	-21,6%	-60,8%
Lesotho	181	147	134	-18,8%	-8,8%	289	263	253	-9,0%	-3,8%	322	296	133	-8,1%	-55,1%
Mozambique	1660	1670	1 909	0,6%	14,3%	1708	1751	1895	2,5%	8,2%	1787	1951	823	9,2%	-57,8%
Swaziland	137	125	164	-8,8%	31,2%	236	225	236	-4,7%	4,9%	288	354	169	22,9%	-52,3%
Botswana	1239	1469	1 204	18,6%	-18,0%	1603	1795	1828	12,0%	1,8%	2112	2197	703	4,0%	-68,0%
Malawi	1126	1103	1 079	-2,0%	-2,2%	1303	1338	1312	2,7%	-1,9%	1570	1439	718	-8,3%	-50,1%
Namibia	2305	2051	1 850	-11,0%	-9,8%	2847	2847	2501	0,0%	-12,2%	3525	3859	1365	9,5%	-64,6%
Zambia	2240	2521	2 139	12,5%	-15,2%	2959	2928	2452	-1,0%	-16,3%	3365	3126	1241	-7,1%	-60,3%
Angola	1654	1321	1 178	-20,1%	-10,8%	1732	1431	1535	-17,4%	7,3%	1818	1655	597	-9,0%	-63,9%
Nigeria	2483	2441	1 628	-1,7%	-33,3%	3173	2612	2224	-17,7%	-14,9%	3972	2745	1037	-30,9%	-62,2%

Source: ForwardKeys, data as of 04 April 2020

### South Africa's top ten Africa markets by Forwardkeys bookings

According to Forwardkeys data, all African top ten markets indicates a decline in bookings for the coming six months compared to the bookings for the same period in 2019. It should be noted that bookings might change closer to the time of travel and this data should be used with caution.

**Table 9: SA's top ten Africa market bookings**

No.	Top 10 African Markets	Next Month		Next 3 Months		Next 6 Months	
		April 2020	Var%	Apr-Jun 20	Var%	Apr-Sept 20	Var%
1	Zimbabwe	204	-94,9%	754	-84,8%	1 649	-72,7%
2	Lesotho	15	-85,8%	44	-65,1%	48	-63,4%
3	Mozambique	59	-92,7%	176	-81,3%	234	-76,8%
4	Swaziland	24	-81,4%	48	-68,6%	53	-67,1%
5	Botswana	58	-94,7%	402	-72,5%	637	-62,0%
6	Malawi	42	-95,4%	164	-85,2%	244	-81,7%
7	Namibia	115	-94,5%	493	-83,8%	836	-75,3%
8	Zambia	76	-95,8%	494	-78,2%	865	-66,9%
9	Angola	219	-80,2%	402	-69,7%	489	-64,9%
10	Nigeria	214	-89,3%	445	-84,0%	548	-81,5%

Source: ForwardKeys, data as of 04 April 2020

## HOTEL PERFORMANCE: FEBRUARY 2020

The only latest official data available from Statistics South Africa on the performance of the accommodation industry is for January 2020. The analysis in this section will be based on the reports received from STR Global on estimates for the performance of the hotel industry which covers February and March 2020. According to STR, it is estimated that the occupancy rate for South African hotels went up by 1.8% moving from 66, 9% in 2019 to 68, 1% in 2020.

**Table 10: Hotel Performance data for February 2020**

	Current Month - February 2020 vs February 2019											
	Occ %		ADR		RevPAR		Percent Change from February 2019					
	2020	2019	2020	2019	2020	2019	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold
South Africa+	68,1	66,9	1 465,48	1 406,18	997,74	940,81	1,8	4,2	6,1	5,8	-0,3	1,5
South Africa 5 Stars+	74,9	73,7	2 806,84	2 658,21	2 103,25	1 960,22	1,6	5,6	7,3	8,0	0,6	2,3
South Africa 4 Stars+	70,1	68,4	1 348,99	1 308,88	945,85	894,70	2,6	3,1	5,7	5,6	-0,1	2,5
South Africa 3 Stars+	66,5	65,3	1 017,80	995,09	676,52	649,76	1,8	2,3	4,1	3,3	-0,8	1,0

Source: STR Global February 2020 Report

Data from STR Global also estimates that the hotel occupancy rate went down from 67,6% in March 2019 to 37,2% during the same month in 2020. Revenue Per Available Room (RevPAR) and Average Daily Rate (ADR) also went down during this period.

**Table 11: Hotel Performance data for March 2020**

	Current Month - March 2020 vs March 2019											
	Occ %		ADR		RevPAR		Percent Change from March 2019					
	2020	2019	2020	2019	2020	2019	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold
South Africa+	37,2	67,6	1 264,86	1 320,43	470,62	893,13	-45,0	-4,2	-47,3	-47,5	-0,3	-45,2
South Africa 5 Stars+	36,8	72,9	2 331,21	2 475,84	858,97	1 805,01	-49,5	-5,8	-52,4	-52,1	0,6	-49,2
South Africa 4 Stars+	37,9	68,1	1 192,61	1 227,87	452,56	835,78	-44,3	-2,9	-45,9	-45,9	-0,2	-44,3
South Africa 3 Stars+	37,3	67,3	980,42	973,35	366,00	655,20	-44,5	0,7	-44,1	-44,6	-0,8	-45,0

Source: STR Global February 2020 Report