

SECTION ONE: SUMMARY ANALYSIS OF SOUTH AFRICA'S TRAVELLERS (ARRIVALS AND DEPARTURES):

APRIL AND MAY 2020

NOTE: To limit the spread of COVID-19 and to prepare the healthcare sector in dealing with the outbreak of the corona virus optimally, the South African government announced a 21-day lockdown starting from 27 March 2020. The lockdown prevented movement of people entering and leaving South Africa. The lockdown continued in April and May 2020 and as a result tourists were not allowed to enter the country during this period. However, exceptions were made for South Africans and travellers from other countries to return to their country of residence during this period. Statistics South Africa (Stats SA) has therefore published data on the number of arrivals, departures and transit travellers of South African residents and foreign travellers during April and May 2020. It should be noted that purpose of visit for arrivals to the country during these two months was not included in the reports. This report provides an analysis all travellers for April and May 2020, including the performance of other tourism related industries for April and May 2020 compared to the same months last year.

TOTAL TRAVELLERS: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

Total travellers which include South African residents and foreign arrivals are provided in Table 1 below. In April 2020 there was a total of 97 425 travellers (arrivals, departures and transits) that passed through South African ports of entry, which was a decline of -97,3% compared to 3 632 618 travellers recorded in April 2019. In May 2020, total travellers declined by -95,3%; from 3 285 819 in May 2019 to 153 450 in May 2020.

Table 1: Total Arrivals and Departures: April and May 2020 compared to April and May 2019

	Apr-20	Apr-19	% Change	May-20	May-19	% Change
Total Travellers	97 425	3 632 618	-97,3%	153 450	3 285 819	-95,3%

Source: Stats SA Tourism and Migration report, April and May 2020.

SOUTH AFRICAN RESIDENT TRAVELLERS: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

Table 2 shows that a total of 31 014 of South African resident travellers (arrivals and departure) were recorded in April 2020, which was a decrease of -96, 9% (-969 762) compared to the same month in 2019. Further analysis of the South African resident travellers data showed high declines of -96,8% and -97,0% for

South African arrivals and departures respectively during April 2020. Data revealed no South Africans on transit during April 2020. For May 2020 period, there was a total of 49 414 South African resident travellers, which was a decline of -94, 5%, compared to 896 563 in May 2019. South African arrivals and departures also experienced high declines over the two months period.

Table 2: South Africa resident travellers: April and May 2020 compared to April and May 2019

South Africa Residents	Apr-20	Apr-19	% Change	May-20	May-19	% Change
Arrivals	15 716	493 734	-96,8%	25 915	442 436	-94,1%
Departures	15 298	506 224	-97,0%	23 499	453 266	-94,8%
Transits		818	-100,0%		861	-100,0%
Total	31 014	1 000 776	-96,9%	49 414	896 563	-94,5%

Source: Stats SA Tourism and Migration report, April and May 2020.

The high decline was as a result of the lockdown in South Africa which prevented people from leaving and entering the country.

Note: More information on the released figures for April and May 2020, including data by country and purpose of visit, was requested from Stats SA and it was indicated that the information could not be provided due to the Data Policy Guidelines published by Stats SA in 2015.

FOREIGN TRAVELLERS: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

Table 3 indicates foreign travellers by arrivals, departures and transits for April and May 2020 compared to April and May 2019. Total foreign travellers decreased from 2 631 842 in 2019 to 66 411 in 2020, which was a decrease of -97, 5%. Further analysis of data indicates that the number of foreign arrivals and departures declined by -97, 8% and -97, 0% respectively during April 2020. There were only two and four transit foreign travellers recorded for April and May 2020 respectively. In May 2020, there was a total of 104 036 foreign travellers recorded, which was a decline of -95,6%, compared to 2 389 256 recorded in May 2019. A decrease in numbers of foreign arrivals (-95, 9%) and departures (-95,1%) was reported in May 2020 compared to May 2019.

Table 3: Foreign travellers: April and May 2020 compared to April and May 2019

Foreign Travellers	Apr-20	Apr-19	% Change	May-20	May-19	% Change
Arrivals	29 341	1 350 167	-97,8%	49 481	1 213 675	-95,9%
Departures	37 068	1 217 493	-97,0%	54 551	1 106 649	-95,1%
Transits	2	64 182	-100,0%	4	68 932	-100,0%
Total	66 411	2 631 842	-97,5%	104 036	2 389 256	-95,6%

Source: Stats SA Tourism and Migration report, April and May 2020

FOREIGN ARRIVALS BY REGION AND MODE OF TRAVEL: APRIL AND MAY 2020

Table 4 shows foreign arrivals by region and mode of transport for April 2020. There was a total of 29 341 foreign arrivals recorded in April 2020 as already indicated above. Most (28 832; 98,3% share) of these foreign arrivals were from Africa, compared to 507 (1,7% share) foreign arrivals from overseas during April 2020. Majority of foreign arrivals (28 812) from Africa travelled to South Africa by road transport, while most overseas travellers (254) used air transport.

Table 4: Foreign travellers by region and mode of transport: April 2020

Region	Total	Air	Road	Sea
Overseas	507	254	158	95
Europe	161	32	108	21
North America	5	2		3
Central and South America	217	217		

Australasia	15		14	1
Asia	109	3	36	70
Africa	28 832	20	28 812	
Unspecified	2		2	
Total	29 341	274	28 972	95

Source: Stats SA Tourism and Migration report, April 2020

Table 5 below indicates foreign arrivals by region and mode of transport for May 2020. A total of 49 481 foreign arrivals were recorded in May 2020. There were more foreign arrivals from Africa region (49 153; 99,3% share) compared to 315 (0,6% share) of foreign arrivals from overseas. Most of the foreign arrivals from Africa region used road transport (49 105), and some (86) foreign arrivals from overseas used air transport.

Table 5: Foreign travellers by region and mode of transport: May 2020

Region	Total	Air	Road	Sea
Overseas	315	86	195	34
Europe	115	27	76	12
North America	31	15	16	
Central and South America	4	4		
Australasia	19	1	16	2
Asia	146	39	87	20
Africa	49 153	46	49 105	2
Unspecified	13	7	6	
Total	49 481	139	49 306	36

Source: Stats SA Tourism and Migration report, May 2020

SECTION TWO: PERFORMANCE OF SOUTH AFRICA'S TOURISM RELATED INDUSTRIES: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

The next section of the report provides performance of tourism related industries for April and May 2020 compared to the same months last year.

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. On the 5th March 2020, the South African government announced the first case of COVID-19 in the country. As a way of managing the possible increasing levels of infection, the government announced a 21-day lockdown starting from the 27th March 2020. During April and May 2020 the country continued to be under lockdown with limited sectors permitted to operate. On 1st May 2020, the South African government adopted the risk adjusted strategy that aimed at increasing the 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 together with different sectors that can operate under these levels. For April 2020, South Africa was under level five (5), which prevented the operations of most industries in the tourism sector. On 1st May 2020, South Africa moved to level four (4) allowing some of the tourism related industries to operate under strict conditions. The results below, for the tourism related industries, should therefore be viewed within the context of the different lockdown levels implemented due to COVID-19 outbreak during April and May 2020.

2.1 ACCOMMODATION:

ACCOMMODATION INDUSTRY INCOME: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

During April 2020, the total income from the accommodation industry recorded a decline of -98,1% compared to April 2019, a decrease from R1 988,80 million in April 2019 to R37,90 million in April 2020. All categories of accommodation recorded a significant decline in income levels. In May 2020, there was also a decline of -98, 5% in income generated compared to the same month last year. The significant decline in income levels during April and May 2020 could be attributed to COVID-19 level four and five lockdown regulations, which prevented the accommodation industry from operating except for quarantine and essential services (<https://sacoronavirus.co.za/covid-19-risk-adjusted-strategy/>)

Table 6: Income from Accommodation: Jan-March 2020 compared to Jan-March 2019

Type of Accommodation	Apr-20	Apr-19	% Change April 2020 compared to April 2019	May-20	May-19	% Change May 2020 compared to May 2019
Hotels (R million)	R27,10	R1 274,90	-97,9%	R20,60	R1 174,70	-98,2%
Caravan parks and camping sites (R million)	R0,00	R22,60	-100,0%	R0,00	R21,90	-100,0%
Guest houses and guest farms (R million)	R1,00	R81,10	-98,8%	R0,20	R68,30	-99,7%
Other accommodation (R million)	R9,80	R610,20	-98,4%	R6,00	R485,60	-98,8%
Total Industry (million)	R37,90	R1 988,80	-98,1%	R26,80	R1 750,50	-98,5%

ACCOMMODATION INDUSTRY OCCUPANCY RATE: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

Total industry occupancy rates for April and May 2020 and for the same months in 2019 are provided in table 7 below. The results show that the occupancy rate for April 2020 decreased to 2,1% from an April 2019 occupancy rate of 47, 8%. Similarly, in May 2020 the occupancy rate declined to 5,5% from 47,2% in May 2019. All categories of accommodation recorded declines in April 2020 compared to April 2019. Occupancy rate for hotels decreased from 50,7% in April 2019 to 3,2% in April 2020. Caravan parks and camping sites declined to zero occupancy in April 2020 compared to 28,4% in April 2019. Occupancy rate for guest houses and guest farms declined to 1,1% in April 2020 compared to 34,2% in the same month last year. Other accommodation which includes lodges, bed-and-breakfast establishments, self-catering establishments and 'other' establishments not classified, dropped from 47,6% in April 2019 to 0,6% in April 2020.

The May 2020 occupancy rates for the different accommodation categories also recorded a decline when compared to May 2019. Hotels' occupancy rate was 49,2% in May 2019, which declined to 5,6% in May 2020. Caravan parks and camping sites declined to zero occupancy in both April and May 2020 compared to 28,9% and 30,0% in April and May 2019 respectively. The occupancy rate for guest houses and guest farms declined to 0,2% in May 2020 compared to 35,7% in 2019. Other accommodation occupancy rate dropped from 49,6% in May 2019 to 0,6% in May 2020.

Table 7: Occupancy Rate: April and May 2020 compared to April and May 2019

Accommodation Category	Apr-20	Apr-19	May-20	May-19
Hotels	3,2	50,7	5,6	49,2
Caravan parks and camping sites	0,0	28,4	0,0	30
Guest houses and guest farms	1,1	34,2	0,2	35,7
Occupancy rate - Other accommodation	0,6	47,6	0,6	49,6
Total industry	2,1	47,8	5,5	47,2

Source: Stats SA: Accommodation data cuts, 01 August 2020

SOUTH AFRICA'S HOTEL PERFORMANCE: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

In addition to the Stats SA's accommodation report, the Department subscribes to STR Global which collects information from a sample of hotels on a monthly basis. The analysis in this section will be based on the reports received from STR Global for the months April and May 2020 compared to April and May 2019. Data reported for April 2020, which was compared to April 2019, was collected from 49 hotels out of a population of 115 hotels in South Africa. Data reported for May 2020 that was compared to May 2019 was collected from 70 hotels out of a population of 167 hotels in South Africa.

A decline in occupancy rate of -65,9% was recorded in April 2020 compared to April 2019. The Average Daily Rate (ADR) in April 2020 also decreased by -32,0%, dropping from R1 227, 8 to R834,5 during the period under review. Revenue per available room (RevPAR) for April 2020 was R162,3, which was a decline of -76,8%, compared to R700,3 in April 2019.

There was also a -69,9% decline recorded in occupancy rate for May 2020 compared to May 2019. Comparing May 2020 to May 2019, the ADR and RevPAR also experienced a decline of -28,9% and -78,6% respectively.

Table 8: South Africa Hotel Performance: April and May 2020 compared to April and May 2019

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change
Apr-20	19,5	-65,9%	834,5	-32,0%	162,3	-76,8%
Apr-19	57,0		1227,8		700,3	
May-20	16,81	-69,9%	824,1	-28,9%	138,5	-78,6%
May-19	55,76		1158,5		645,9	

Source: STR Global Hotel Data April and May 2020

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

The results in table 9 below show that the total income of food and beverages industry was about R 241, 10 million in April 2020, which was a decrease of -94,6% when compared to income of about R 4 486,9 million for April 2019. All categories of food and beverages had declined together with take-away and fast food outlets. In addition, restaurants and coffee shops reported a zero income generated for the month of April 2020. In April 2020, South Africa was under lockdown level 5, which prevented the take-away and fast food outlets, restaurants and coffee shops from operating.

Table 9 below also provides the total income of the food and beverages industry for May 2020 compared to May 2019. Comparing May 2020 to May 2019, there was a decline of -87,9% in total income received by the food and beverages industry. All categories of food and beverages industry also recorded declines in total income, with restaurants and coffee shops having the highest decline of -98,0 %. On 1st May 2020, South Africa moved to level 4 of the Coronavirus Risk Adjusted Strategy. Under level 4 the food and beverages industry were allowed to operate under the following conditions:

- Sale of any food product, including non-alcoholic beverages and animal food;
- The sale of hot cooked food, only for home delivery;
- Restaurants only for food delivery services (9am-8pm) and subject to curfew (no sit down or pick-up allowed)

(Source: <https://sacoronavirus.co.za/covid-19-risk-adjusted-strategy/>)

Table 9: Total income by type of food and beverages industry: April 2020 compared to April 2019

Categories of Food and Beverages	Apr-20	Apr-19	% Change	May-20	May-19	% Change
Catering services (million)	R241,10	R 686,8	-64,9%	R283,3	R704,9	-59,8%
Take-away and fast food outlets (million)	R0,00	R 1 437,2	-100,0%	R218,4	R1 531,2	-85,7%
Restaurants and coffee shops (million)	R0,00	R 2 362,9	-100,0%	R45,9	R2 308,2	-98,0%
Total Industry (million)	R241,10	R 4 486,9	-94,6%	R547,6	R4 544,3	-87,9%

Source: Stats SA: Food and beverages data cuts, 01 August 2020

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

Table 10 below shows the total passenger arrivals in Airports Company South Africa (ACSA) airports during April and May 2020 compared to April and May 2019. Total passenger arrivals decreased by -99,7%, dropping from 1 788 318 in April 2019 to 5 181 in April 2020. As mentioned previously, South Africa was under lockdown level five (5) in the month of April, which prevented the movement of people across the international borders including provincial borders. The passengers who arrived in April 2020 on international, regional and unscheduled flights could be correlated to the South Africans who were repatriated from other countries during this period.

Annexure A below from the Department of International Relations and Cooperation (DIRCO), provides a list of flights arriving in South Africa during April 2020 mainly repatriating South Africans who were in other countries.

In May 2020 compared to May 2019, there was a decline of -99, 7% in total passengers arriving in South Africa. On the 01st May 2020, South Africa moved from level five (5) to level four (4) of the lockdown, which still prevented the movement of people across borders. As mentioned above, passengers arriving on international and unscheduled flights in May 2020 could also be South Africans who were repatriated from other countries. According to DIRCO, the following flights were planned for May 2020 for repatriating South Africans during the COVID-19 outbreak:

- 8 May 2020: From Bangkok, Thailand, repatriating approximately 275 South Africans
- 8 May 2020: From Bali and Jakarta, repatriating approximately 275 South Africans
- 9 May 2020: From Washington, USA, repatriating approximately 275 South Africans.

Source: http://www.dirco.gov.za/repatriation_newsletters/2020/repatriation-newsletter03a_04-may-2020.pdf

Table 10: Arriving Passengers: April 2020 compared to April 2019

Arriving Passengers	Apr-20	Apr-19	% Change April 2020 compared to April 2019	May-20	May-19	% Change May 2020 compared to May 2019
International	490	480 285	-99,9%	288	419 630	-99,9%
Regional	36	46 842	-99,9%	0	46 378	-100,0%
Domestic	0	1 256 053	-100,0%	0	1 112 811	-100,0%
Unscheduled	4 655	5 138	-9,4%	4 033	4 392	-8,2%
Total	5 181	1 788 318	-99,7%	4 321	1 583 211	-99,7%

Source: Stats SA: ACSAs data cuts, July 2020

PASSENGER DEPARTURE MOVEMENT: APRIL AND MAY 2020 COMPARED TO APRIL AND MAY 2019

Table 11 below indicates the total passengers departing in Airports Company South Africa (ACSA) airports during April and May 2020 compared to April and May 2019. Total passengers departing decreased by -99,2%, from 1 812 061 passengers in April 2019 to 14 910 in April 2020. As mentioned above, South Africa was under lockdown level five (5) in the month of April, which prevented the movement of people across international and provincial borders. For passengers departing on both international and regional flights there was a decrease of -99, 9% during the period under review. Due the restrictions of provincial travel, domestic passengers were also unable to travel, which is reflected in April 2020 results as there were zero domestic passengers recorded.

Table 11: Departing Passengers: April 2020 compared to April 2019

Departing Passengers	Apr-20	Apr-19	% Change April 2020 compared to April 2019	May-20	May-19	% Change May 2020 compared to May 2019
International	529	498 956	-99,9%	302	447 258	-99,9%
Regional	60	47 838	-99,9%	-	46 383	-100,0%
Domestic	-	1 260 748	-100,0%	-	1 119 124	-100,0%
Unscheduled	14 321	4 519	216,9%	5 556	4 631	20,0%
Total	14 910	1 812 061	-99,2%	5 858	1 617 396	-99,6%

Source: Stats SA: ACSAs data cuts, July 2020

The number of passengers on unscheduled flights in April 2020 increased by 216, 9%, growing from 4 519 in April 2019 to 14 321 in April 2020. Further analysis on unscheduled flights also indicates that passengers departing on unscheduled flights had been declining over the years, that is, from April 2016 to April 2019 (refer to table 12 below). The increase in unscheduled flights in April 2020 could be due to flights arrangements by different embassies in South Africa for travellers who were unable to leave South Africa because of the lockdown restrictions. Some of the arranged flights include:

- US Embassy: Thursday, April 9 2020, departures from Johannesburg, Cape Town, and Durban. On Friday, April 10, an additional flight from Cape Town arranged for US citizens.
- UK embassy: Thursday, April 9 2020, the British government in partnership with Virgin Atlantic Airlines arranged repatriation flights from Johannesburg and Cape Town for British travellers currently stranded in South Africa as a result of the outbreak of coronavirus (COVID-19) pandemic
- German embassy; April 23 2020, The German government has brought home more than 5,600 travellers from South Africa. German repatriation flights operated by South African Airways started on April 3 and ended with a last flight out of Cape Town on April 23 2020.

In May 2020, there was -99, 6% decline in total passengers departing from South Africa compared to May 2019. On 1 May 2020, South Africa moved from level five (5) to level four (4) lockdown restrictions, which still prevented the movement of people across borders and intra- & inter provincially. As indicated above, passengers departing on international and unscheduled flights in May 2020 could also include travellers from other countries who were in South Africa and had to be repatriated.

Table 12: Departing Passengers on unscheduled flights: April 2016-2020

Passengers departing	Apr-16	Apr-17	Apr-18	Apr-19	Apr-20
Unscheduled	5 950	5 230	4 991	4 519	14 321
% Change	-10,8%	-12,1%	-4,6%	-9,5%	216,9%

Source: Stats SA: ACSAs data cuts, July 2020

Annexure A: Arriving Flights with repatriated South Africans; April 2020

8 April 2020	19 April 2020
A SAA flight from São Paulo repatriated 66 South Africans from Brazil	A SAA flight from Frankfurt repatriated 206 South Africans
A SAA flight from Frankfurt repatriated 54 South Africans from Germany	A private charter flight repatriated 36 South Africans from Luanda, Angola
9 April 2020	A private charter flight from Cameroon via Luanda, Angola, repatriated 29 South Africans
A Turkish Air cargo flight repatriated two South Africans accompanying mortal remains of the deceased father	
10 April 2020	21 April 2020
A private charter repatriated four South Africans from Afghanistan	A Saudi Air flight repatriated 93 South Africans from Saudi Arabia
A private charter repatriated 49 South Africans from Namibia	A private charter repatriated 83 South Africans from Pakistan
11 April 2020	23 April 2020
A SAA flight from Brussels to Johannesburg, with a stop-over in Lagos, repatriated 119 South Africans	A SAA flight re-routed through Cairo, Egypt, repatriated 25 South Africans
A private charter repatriated 41 South Africans from the Maldives	A Saudi Air flight repatriated 60 South Africans
12 April 2020	A special charter flight from the Democratic Republic of Congo (DRC) repatriated 11 South Africans
A SAA flight from London to Cape Town repatriated 200 South Africans	24 April 2020
A private charter repatriated four South Africans from Madagascar	A special charter flight repatriated 23 South Africans from Zambia
13 April 2020	A special charter flight repatriated two South Africans from Zambia
A SAA flight from Ghana repatriated 62 South Africans	25 April 2020
	The last SAA flight from Frankfurt, chartered by the German Government, returned to South Africa with 160 people on board
14 April 2020	An Emirates Air flight repatriated 165 South Africans on a special charter flight from Dubai
A private charter repatriated three South Africans from Zambia	A special charter flight repatriated nine South Africans from Guinea Conakry
15 April 2020	A special charter flight repatriated 23 South Africans from the Seychelles
A SAA flight chartered by Workaways International in the USA repatriated 305 South African workers	28 April 2020
16 April 2020	A Qantas Air flight, chartered by the Australian Government, repatriated 185 South Africans
An Ethiopian Airlines cargo flight from Addis Ababa repatriated 13 South Africans	29 April 2020
17 April 2020	A charter flight from Tanzania repatriated 26 South Africans
A charter flight from Egypt repatriated 13 South Africans	
A SAA flight from Frankfurt via Luanda repatriated 84 South Africans	A charter flight from the DRC repatriated 51 South Africans
18 April 2020	30 April 2020
A SAA flight from Frankfurt via Rome repatriated 80 South Africans from Italy	A Namibian Air Charter repatriated 23 South Africans
A private charter repatriated six South African crew members from Haiti	

Source: http://www.dirco.gov.za/repatriation_newsletters/2020/repatriation-newsletter04_13-may-2020.pdf

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