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

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.

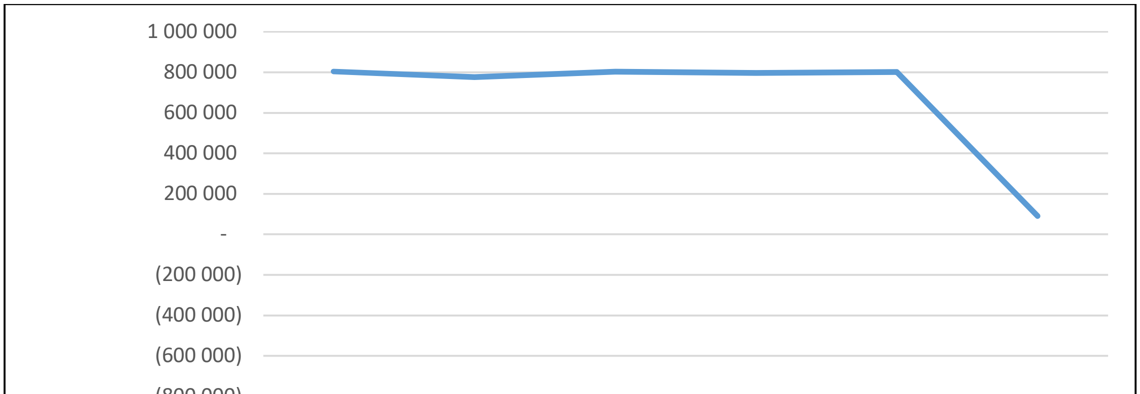
During February 2021, South Africa was under adjusted alert level 3 which allowed for international tourists to travel to the country subject to restrictions. These restrictions included that all travellers visiting the country will be expected to abide by the regulations which include mandatory wearing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

TREND ANALYSIS: FERUARY 2016 – FEBRUARY 2021

A total of 90 165 tourist arrivals was recorded in February 2021, which was a decrease of -88,7% (-710 650) compared to the same month in 2020. The decline experienced could be as a result of the impact of COVID-19 pandemic.

Figure 1 below indicates tourist arrivals for the period February 2016 to February 2021. Tourist arrivals decreased from 803 770 in 2016 to 775 824 in 2017 which was a decrease of -3,5% (-27 946). Tourist arrivals increased from 775 824 in 2017 to 802 252 in 2018, which was an increase of 3,4% (26 428). However, tourist arrivals decrease by -0,6% (-5 071) in February 2019 compared to the same month in 2018. Comparing February 2020 with February 2019, there was an increase of 0,5% (3 634) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals February 2016 to February 2021



	2016	2017	2018	2019	2020	2021
Tourist Arrivals	803 770	775824	802252	797 181	800 815	90 165
Diff.	122 554	(27 946)	26 428	(5 071)	3 634	(710 650)
% Diff	18,0%	-3,5%	3,4%	-0,6%	0,5%	-88,7%

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

FEBRUARY 2021 COMPARED TO FEBRUARY 2020 BY REGION

Table 1 below indicates tourist arrivals by region for February 2021 compared to the same month in 2020. 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 -98,1% (-8 441) followed by Central and South America (-96,9%; -10 779) and Europe (-96,3%; -167 559). Africa also recorded a decrease of -85,6% (-472 110) and this region remains the main source of tourist arrivals to the country, accounting for 87,9% (79 266) of total tourist arrivals during this month.

Table 1: Total Tourist Arrivals by Region: February 2021 vs. February 2020

Region	February 2021	February 2020	Diff	% Diff.
EUROPE	6 403	173 962	-167 559	-96,3%
NORTH AMERICA	1 420	32 806	-31 386	-95,7%
CENTRAL & SOUTH AMERICA	341	11 120	-10 779	-96,9%
AUSTRALASIA	166	8 607	-8 441	-98,1%
MIDDLE EAST	206	4 261	-4 055	-95,2%
ASIA	2 209	17 281	-15 072	-87,2%
TOTAL OVERSEAS	**10 745**	**248 037**	**-237 292**	**-95,7%**
AFRICA	**79 266**	**551 376**	**-472 110**	**-85,6%**
Unspecified	154	1 402	-1 248	-89,0%
GRAND TOTAL	**90 165**	**800 815**	**-710 650**	**-88,7%**

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

JANUARY-FEBRUARY 2021 COMPARED TO JANUARY-FEBRUARY 2020

Tourist arrivals figures by region for the period January-February 2021 compared to the same period in 2020 are indicated in table 2 below. Total tourist arrivals went down by -87.9% (-1 664 784) for the period January-February 2021 compared the same period in 2020 (1 894 083).

Total tourist arrivals from the overseas market decreased by -95.0% (-466 155). Australasia (-97.9%) recorded the highest decrease followed by Central and South America (-96.9%), Europe (-95.5%), North America (-94.5%), Middle East (-94,0%) and Asia with a decrease of -90.5%. In Australasia, Australia recorded the highest decline in volume having a decline of -15 059 (-97.9%) followed by New Zealand (-2 717; -97.8%). In Central and South America, Brazil had recorded the highest decline in volume (-15 048: 97,3%) for the period under review. The United Kingdom had recorded the highest decline in volume (-97 356; 97,3%) in the Europe region. Tourist arrivals from Africa decreased by -85.4% (-1 196 583) during the same period under review. In terms of volume, the decrease recorded from the continent was driven by a decrease of (-392 752; 86,9%) from Zimbabwe, followed by Lesotho (-278 495/87.4%) and Mozambique (-215 984/-81,1%).

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

Region	Jan-Feb 2021	Jan-Feb 2020	Diff	% Diff
EUROPE	15 085	331 770	-316 685	-95,5%
NORTH AMERICA	3 572	64 400	-60 828	-94,5%
CENTRAL & SOUTH AMERICA	742	23 687	-22 945	-96,9%
AUSTRALASIA	389	18 191	-17 802	-97,9%
MIDDLE EAST	565	9 495	-8 930	-94,0%
ASIA	4 079	43 044	-38 965	-90,5%
TOTAL OVERSEAS	**24 432**	**490 587**	**-466 155**	**-95,0%**
TOTAL AFRICA	**204 491**	**1 401 074**	**-1 196 583**	**-85,4%**
Unspecified	376	2 422	-2 046	-84,5%
GRAND TOTAL	**229 299**	**1 894 083**	**-1 664 784**	**-87,9%**

Source: Stats SA tourist arrivals data cuts

Table 3 below gives the rankings of the top ten African source markets for the period January-February 2021 compared to January-February 2020. Most of the top ten African source markets moved their positions for the period under review except for Zimbabwe and Eswatini which ranked in 1st and 4th position respectively in January-February 2021 and January-February 2020. Mozambique, Namibia, Zambia and Nigeria all moved up their positions in 2021 when compared to 2020. The Democratic Republic of Congo (DRC) replaced Angola moving from the 12th position in Jan-Feb 2020 to 10th position in Jan-Feb 2021. Lesotho dropped from the 2nd position in 2020 to 3rd position in 2021. Botswana moved down from 5th position in 2020 to 6th position in 2021 during the period under review. Malawi dropped from 6th position in 2020 to 8th position in 2021. All of the top ten countries recorded a decline with Botswana recording the highest decline of -91,1% followed by Eswatini (-89.7%) and Lesotho (-87.4%).

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

Country	Rank-2021	Tourist Arrivals 2021	Rank-2020	Tourist Arrivals 2020	% Change from 2020 to 2021
Zimbabwe	1	59 268	1	452 020	-86,9%
Mozambique	2	50 177	3	266 161	-81,1%
Lesotho	3	40 116	2	318 611	-87,4%
Eswatini	4	14 124	4	137 727	-89,7%
Namibia	5	10 583	7	27 088	-60,9%
Botswana	6	8 107	5	90 591	-91,1%
Zambia	7	7 671	8	23 337	-67,1%
Malawi	8	4 601	6	32 210	-85,7%
Nigeria	9	1 945	10	6 433	-69,8%
DRC	10	1 589	12	5 143	-69,1%

Source: Source: Stats SA tourist arrivals data cuts

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-February 2021 with January-February 2020, all of the top 10 overseas markets recorded a decrease in tourist arrivals. Most of the top ten overseas source markets moved their positions for the period under review except for Germany and France which ranked in 2nd and 4th position respectively in January-February 2021 and January-February 2020. USA replaced UK as the main source market from overseas recording a decline of -94.1%. Brazil, Australia, Canada and Sweden were replaced by Russian Federation, Pakistan, China and Switzerland in the top 10 during January-February 2021 compared to January-February 2020.

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

Country	Rank-2021	Tourist Arrivals 2021	Rank-2020	Tourist Arrivals 2020	% Change from 2020 to 2021
USA	1	3 085	3	51 982	-94,1%
Germany	2	2 856	2	77 369	-96,3%
UK	3	2 724	1	100 080	-97,3%
France	4	1 698	4	28 994	-94,1%
India	5	1 693	8	14 437	-88,3%
Russian Federation	6	1 304	21	4420	-70,5%
The Netherlands	7	1 015	5	26 319	-96,1%
Pakistan	8	710	30	2 536	-72,0%
China	9	652	12	10 791	-94,0%
Switzerland	10	627	11	11 400	-94,5%

Source: Stats SA tourist arrivals data cuts

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

The next section of the report is about the performance of tourism related industries during February 2021 compared to February 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 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. For the month of February 2021, South Africa was under adjusted level 3 which was from 29 January 2021-28 February 2021. Under adjusted level 3, there were more strict measures put in place to prevent the spread of COVID-19. The country was experiencing a second wave of COVID-19 in January 20201 which included high levels of COVID-19 infections and an increase in the number of deaths. The table below provides a summary of the adjusted level 3 lockdown regulations 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 Adjusted level 3 regulations for the accommodation, food and beverages and aviation industries

ACCOMMODATION
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
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
Domestic air travel allowed. International travel allowed.

Source: https://www.gov.za/coronavirus

2.1 ACCOMMODATION INDUSTRY: JANUARY-FEBRUARY 2021

ACCOMMODATION INDUSTRY INCOME: FEBRUARY 2021 COMPARED TO FEBRUARY 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 February 2021 compared to February 2020. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During February 2021, the total income (current prices) from the accommodation industry recorded a decline of -72.7% compared to February 2020. Total income from all categories recorded a decline with total income from hotels recording the highest decline of about-74.6% moving from R3 297.3 million in February 2020 to R837.6 million in January-February 2021.

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

Type of Accom-modation	Feb 2021				Feb 2020				% Change Total Income
	Res-taurants, bar sales	Accommo-dation only	Other income	Total income	Res-taurants, bar sales	Accom-modation only	Other Income	Total income	Jan-Feb 2021 compared to Jan-Feb 2020
Hotels (R million)	R177,0	R340,7	R319,9	**R837,6**	R615,9	R1 554,9	R1 126,5	**R3 297,3**	**-74,6%**
Caravan parks and camping sites (R million)	R0,0	R8,3	R0,0	**R8,3**	R0,4	R16,8	R0,5	**R17,7**	**-53,1%**
Guest houses and guest farms (R million)	R4,7	R37,9	R2,4	**R45,0**	R10,4	R77,5	R4,5	**R92,4**	**-51,3%**
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R31,5	R191,1	R23,9	**R246,5**	R85,6	R613,1	R63,5	**R762,2**	**-67,7%**
Total Industry (R million)	**R213,2**	**R578,0**	**R346,2**	**R1 137,4**	**R712,3**	**R2 262,3**	**R1 195,0**	**R4 169,6**	**-72,7%**

Source: Stats SA: Accommodation data cuts, 19 April 2021

Table 7 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went down by -74,5% during the same period under review. All categories of accommodation recorded a decline in income levels with hotels recording the highest decline of -78,1%; followed by other accommodation (-68,8%), guest houses and guest farms (-51,1%) and caravan parks and camping sites (-50,6%).

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

Type of Accommodation	Feb 2021 Accommodation only	Feb 2020 Accommodation only	% Change Feb 2021 compared to Feb 2020
Hotels (R million)	R340,7	R1 554,9	-78,1%
Caravan parks and camping sites (R million)	R8,3	R16,8	-50,6%
Guest houses and guest farms (R million)	R37,9	R77,5	-51,1%
Other accommodation (R million)	R191,1	R613,1	-68,8%
Total Industry (R million)	R578,0	R2 262,3	-74,5%

Source: Stats SA: Accommodation data cuts, 19 April 2021

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) for January and February 2021 compared to January and February 2020 is provided in table 8 below. Income from accommodation recorded an increase of 8,1% during February 2020 compared to the same month in 2019. As already indicated, income from accommodation declined by -74,5% in February 2021 compared to February 2020.

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

MONTH	2020	2021
January	4,7%	-71,2%
February	8,1%	-74,5%

Source: Stats SA: Accommodation data cuts, 19 April 2021

ACCOMMODATION INDUSTRY OCCUPANCY RATE: FEBRUARY 2021 COMPARED TO - FEBRUARY 2020

Table 9 below indicates occupancy rates by accommodation type for the months of January and February 2021 compared same months in 2020. The total accommodation occupancy rate recorded in February 2021 was 20.4% which was a decline compared to 49.8% in February 2020. The occupancy rate of all accommodation establishments declined in February 2021 compared to same month of the previous year. There was a slight improvement in occupancy rate for the total accommodation industry in February 2020 (20.4%) recorded compared to January 2020 performance (18.5%).

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

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jan-20	46,0%	26,3%	39,1%	46,8%	44,7%
Jan-21	14,8%	19,4%	15,1%	28,7%	18,5%
Feb-20	53,9%	25,6%	37,9%	48,0%	49,8%
Feb-21	17,8%	19,6%	15,8%	28,2%	20,4%

Source: Stats SA: Accommodation data cuts, 19 April 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 February 2021 compared to February 2020 is provided in table 10 below. It is important to note that the STR hotel data information for February 2021 and February 2020 is from a sample of 208 hotels that is drawn from a census/population of 362 hotels.

There was a decline recorded in all hotel performance indicators in February 2021 compared to February 2020. The hotel occupancy rate declined by -58.5% in February 2021 compared to February 2020 moving from an occupancy rate of 67,6% in February 2020 to 28,0% in February 2021. The Average Daily Rate (ADR) for February 2021 was R1 002,20 which was a decline of -31,2% compared to R1 456, 86 in February 2020. The Revenue Per available room also decreased by -71,5% moving from R985,13 in February 2020 compared to R280,95.

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

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
Feb-21	28,0%	-58,5%	R1 002,20	-31,2%	R280,95	-71,5%	362	208
Feb-20	67,6%		R1 456,86		R985,13			

Source: STR Hotel Data February 2021

2.2 FOOD AND BEVERAGE INDUSTRY

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

The results in table 11 indicates that the total income for the food and beverages industry for February 2021 was about R3 332,2 million, which was a decrease of -24,6% compared to R4 416,9 million in January-February 2020. All of the food and beverages industries showed a decline in income except for take-away and fast outlets industry. The catering services industry recorded the highest decline of -50,3% followed by restaurant and coffee shops with -32,4%. Take-away and fast food outlets industry growth was almost flat with a slight growth of 0,1% during the period under review.

Table 11: Total income by type of food and beverage industry: February 2021 compared to February 2020

Categories of Food and Beverages	Feb 21	Feb 20	% Change
Catering services (R million)	R305,6	R614,6	-50,3%
Take-away and fast food outlets (R million)	R1 405,8	R1 404,1	0,1%
Restaurants and coffee shops (R million)	R1 620,8	R2 398,2	-32,4%
Total Industry (R million)	**R3 332,2**	**R4 416,9**	**-24,6%**

Source: Stats SA: Food and beverages data cuts, 19 April 2021

The monthly percentage change of income from the food and beverage industry for January and February 2021 compared to January and February 2020 is provided in table 12 below. Income from food and beverage industry recorded an increase of 0,4% during February 2020 compared to the same month in 2019. As already indicated, income from food and beverages industry declined by -24,6% in February 2021 compared to February 2020. Although the income from the food and beverage industry recorded a decline February 2021 compared to the same month in 2020, the decline recorded during this month was lower than the decline recorded in January 2021.

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

MONTH	2020	2021
January	2,6%	-37,6%
February	0,4%	-24,6%

Source: Stats SA: Food and beverages data cuts, 19 April 2021

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: FEBRUARY 2021 COMPARED TO FEBRUARY 2020

Table 13 gives the total passenger arrivals at Airports Company South Africa (ACSA) airports during February 2021 compared to February 2020. Total passenger arrivals decreased by -71,1 % moving from 1 689 805 in February 2020 to 488 020 in February 2021. International passengers recorded the highest decline of -90.0% followed by regional (-82.2%), domestic (-64.1%) and unscheduled (-14.5%).

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

Arriving Passengers	Feb 21	Feb 20	% Change
International	44 376	442 555	-90,0%
Regional	6 187	34 802	-82,2%
Domestic	434 315	1 208 772	-64,1%
Unscheduled	3 142	3 676	-14,5%
Total	**488 020**	**1 689 805**	**-71,1%**

Source: ACSAs data cuts, March 2021

PASSENGER DEPARTURE MOVEMENT: FEBRUARY 2021 COMPARED TO FEBRUARY 2020

Table 14 shows the total passenger departing from Airports Company South Africa (ACSA) airports during February 2021 compared to February 2020. Total departing passengers decreased by -71.0%, from 1 693 935 in February 2020 to 491 803 in February 2021. The table further indicates that international passengers departing had the highest decline of -89.3% followed by regional (-83.8%), domestic (-64.0%) and unscheduled (-24.4%).

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

Departing Passengers	Feb 21	Feb 20	% Change
International	47 811	444 758	-89,3%
Regional	5 673	34 918	-83,8%
Domestic	435 270	1 210 226	-64,0%
Unscheduled	3 049	4 033	-24,4%
Total	**491 803**	**1 693 935**	**-71,0%**

Source: ACSAs data cuts, March 2021

References:

1. Statistics South Africa April 20th 2021, Tourism and Migration report.
2. Statistics South Africa, April 19th 2021, Accommodation data cuts.
3. Statistics South Africa, April 19th 2021, Food and Beverage data cuts.
4. Airports Company South Africa, February 2021. Data cuts.
5. str RSA Hotel review data February 2021