

SUMMARY ANALYSIS OF SOUTH AFRICA’S TOURIST ARRIVALS FOR JANUARY 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.

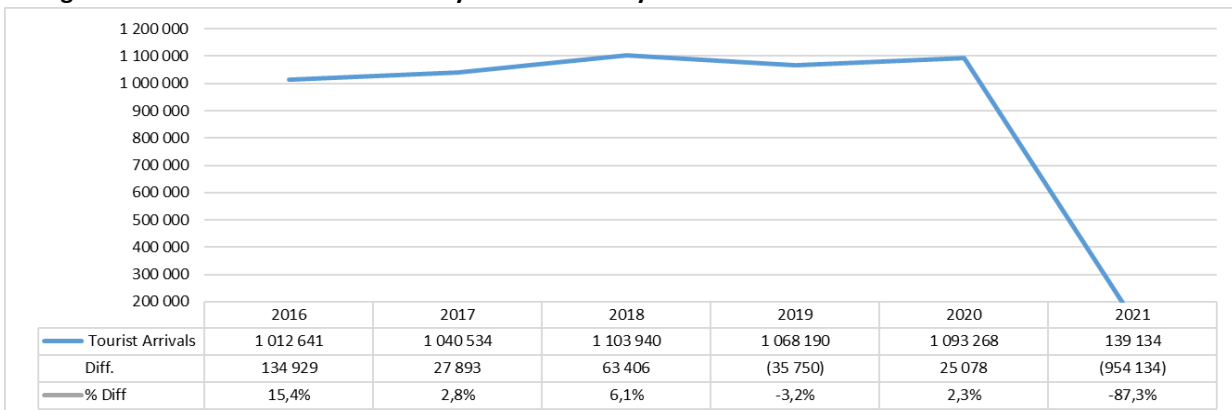
During January 2021, South Africa was under adjusted alert level 3 which allowed for international tourists to travel to the country subject to restrictions. These restrictions included that all travellers visiting the country will be expected to abide by the regulations which include mandatory wearing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

TREND ANALYSIS: JANUARY 2016 – JANUARY 2021

A total of 139 134 tourist arrivals was recorded in January 2021, which was a decrease of -87,3% (-954 134) 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 January 2016 to January 2021. Tourist arrivals increased from 1 012 641 in 2016 to 1 040 534 in 2017 which was an increase of 2,8% (27 893). Tourist arrivals further increased from 1 040 534 in 2017 to 1 103 940 in 2018, which was an increase of 6,1% (63 406). However, tourist arrivals decrease by -3,2% (-35 750) in January 2019 compared to the same month in 2018. Comparing January 2020 with January 2019, there was an increase of 2,3% (25 078) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals January 2016 to January 2021



JANUARY 2021 COMPARED TO JANUARY 2020 BY REGION

Table 1 below indicates tourist arrivals by region for January 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 -97,7% (-9 361) followed by Central and South America (-96,8%; -12 166) and Europe (-94,5%; -149 126). Africa also recorded a decrease of -85,3% (-724 473) and this region remains the main source of tourist arrivals to the country, accounting for 90,0% (125 225) of total tourist arrivals during this month.

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

Region	JANUARY 2021	JANUARY 2020	Diff	% Diff.
EUROPE	8 682	157 808	-149 126	-94,5%
NORTH AMERICA	2 152	31 594	-29 442	-93,2%
CENTRAL & SOUTH AMERICA	401	12 567	-12 166	-96,8%
AUSTRALASIA	223	9 584	-9 361	-97,7%
MIDDLE EAST	359	5 234	-4 875	-93,1%
ASIA	1 870	25763	-23 893	-92,7%
TOTAL OVERSEAS	13 687	242 550	-228 863	-94,4%
AFRICA	125 225	849 698	-724 473	-85,3%
Unspecified	222	1 020	-798	-78,2%
GRAND TOTAL	139 134	1 093 268	-954 134	-87,3%

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

Table 1.1 below gives the rankings of the top ten African source markets for the period January 2021 compared to January 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 2021 and January 2020. Mozambique, Namibia, Zambia, Nigeria and Democratic Republic of Congo (DRC) all moved up their positions in 2021 when compared to 2020. Lesotho dropped from the 2nd position in 2020 to 3rd position in 2021. Botswana also dropped from 5th position in 2020 to 6th position in 2021 during the period under review. Angola and Tanzania were replaced by Nigeria and DRC in the top 10 during January 2021 compared to January 2020. All of the top ten countries recorded a decline with Eswatini recording the highest decline of -90,7% followed by Botswana (-90,0%) and Angola (-75,1%).

Table 1.1: South Africa's Top 10 African Source Markets: January 2021 vs. January 2020

Country	Rank-2021	Tourist Arrivals 2021	Rank-2020	Tourist Arrivals 2020	% Change from 2020 to 2021
Zimbabwe	1	40 579	1	291 982	-86,1%
Mozambique	2	28 771	3	161 574	-82,2%
Lesotho	3	27 628	2	204 791	-86,5%
Eswatini	4	6 951	4	74 370	-90,7%
Namibia	5	4 998	7	14 545	-65,6%
Botswana	6	4 425	5	44 122	-90,0%
Zambia	7	4 167	8	12 256	-66,0%
Malawi	8	2 386	6	18 766	-87,3%
Nigeria	9	1 147	11	3 180	-63,9%
DRC	10	794	12	2 702	-70,6%

Source: Stats SA Tourism and Migration Report, January 2021

Table 1.2 shows the rankings of the top ten overseas source markets. Comparing January 2021 with January 2020, all of the top 10 overseas markets recorded a decrease in tourist arrivals. None of the top ten overseas markets remained

in the same position for the period under review. USA replaced UK as the main source market from overseas recording a decline of -92.8%. Brazil, Australia and Canada were replaced by Russian Federation, Belgium and Switzerland in the top 10 during January 2021 compared to January 2020.

Table 1.2: South Africa's Top 10 Overseas Source Markets: January 2021 vs. January 2020

Country	Rank-2021	Tourist Arrivals 2021	Rank-2020	Tourist Arrivals 2020	% Change from 2020 to 2021
USA	1	1 844	3	25 664	-92,8%
UK	2	1 688	1	49 436	-96,6%
Germany	3	1 557	2	35 067	-95,6%
France	4	1 128	5	12 509	-91,0%
India	5	710	9	7 452	-90,5%
The Netherlands	6	620	4	12 776	-95,1%
Russian Federation	7	612	19	2 524	-124,2%
Belgium	8	380	14	3 799	-90,0%
Switzerland	9	320	12	5 371	-94,0%
China	10	317	6	8 799	-96,4%

Source: Stats SA Tourism and Migration Report, January 2021

PERFORMANCE OF SOUTH AFRICA’S TOURISM RELATED INDUSTRIES: JANUARY 2021 COMPARED TO JANUARY 2020

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

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

Table 2: 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 2021

ACCOMMODATION INDUSTRY INCOME: JANUARY 2021 COMPARED TO JANUARY 2020

Table 3 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 2021 compared to January 2020. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During January 2021, the total income (current prices) from the accommodation industry recorded a decline of -72,9% compared to January 2020. Total income from all categories recorded a decline with total income from hotels recording the highest decline of about-76.9% moving from R3 154,10 million in January 2020 to R729,40 million in January 2021.

Table 3: Income from accommodation (current prices: January 2021 compared to January 2020)

Type of Accommodation	Jan 2021				Jan 2020				% Change Total Income Jan-Dec 2021 compared to Jan-Dec 2020
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	
Hotels (R million)	R125,50	R325,40	R278,50	R729,40	R511,60	R1 432,10	R1 210,40	R3 154,10	-76,9%
Caravan parks and camping sites (R million)	R0,10	R15,00	R0,10	R15,20	R1,00	R22,70	R0,80	R24,50	-38,0%
Guest houses and guest farms (R million)	R6,20	R40,20	R3,00	R49,40	R9,00	R84,90	R5,20	R99,10	-50,2%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R32,00	R251,00	R27,40	R310,40	R83,10	R651,80	R60,30	R795,20	-61,0%
Total Industry - (R million)	R163,80	R631,60	R309,00	R1 104,40	R604,70	R2 191,50	R1 276,70	R4 072,90	-72,9%

Source: Stats SA: Accommodation data cuts, 23 March 2021

Table 4 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went down by -71,2% during the same period under review. All categories of accommodation recorded a decline in income levels with hotels recording the highest decline of -77,3%; followed by other accommodation (-61,5%), guest houses and guest farms (-52,7%) and caravan parks and camping sites (-33,9%).

Table 4: Income from Accommodation (Excluding restaurants, bar sales and other income): Jan 2021 compared to Jan 2020

Type of Accommodation	Jan 2021 Accommodation only	Jan 2019 Accommodation only	% Change Jan 2021 compared to Jan 2020
Hotels (R million)	R325,4	R1 432,1	-77,3%
Caravan parks and camping sites (R million)	R15,0	R22,7	-33,9%
Guest houses and guest farms (R million)	R40,2	R84,9	-52,7%
Other accommodation (R million)	R251,0	R651,8	-61,5%
Total Industry – (R million)	R631,6	R2 191,5	-71,2%

Source: Stats SA: Accommodation data cuts, 18th January 2021

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) for January 2021 compared to January 2020 is provided in table 5 below. Income from accommodation recorded an increase of 4,7% during January 2020 compared to the same month in 2019. As already indicated, income from accommodation declined by -71,2% in January 2021 compared to January 2020.

Table 5: Year on Year Change in income from Accommodation

MONTH	2021	2020
January	-71,2%	4,7%

Source: Stats SA: Accommodation data cuts, 23 March 2021

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JANUARY 2021 COMPARED TO JANUARY 2020

Table 6 below indicates occupancy rates by accommodation type for January 2021 compared January 2020. The total accommodation occupancy rate recorded in January 2021 was 18,8% which was a decline compared to 44,7% in January 2020. The occupancy rate of all accommodation establishments declined in January 2021 compared to same month of the previous year.

Table 6: Occupancy Rate: Jan 2021 compared to Jan 2020

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-21	14,8%	19,7%	15,2%	29,6%	18,8%

Source: Stats SA: Accommodation data cuts, 23 March 2021

2.2 FOOD AND BEVERAGE INDUSTRY

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

The results in table 7 indicates that the total income for the food and beverages industry in January 2022 was about R2 878,9 million, which was a decrease of -36,1% compared to R4 503,2 million in January 2020. All of the food and beverages industry's showed a decline in income with catering services having the highest decrease of -50,1% followed by restaurant and coffee shops with -49,5% and take-away and fast food outlets with -8,0%.

Table 7: Total income by type of food and beverage industry: January 2021 compared to January 2020

Categories of Food and Beverages	Jan-21	Jan-20	% Change
Catering services (R million)	R288,3	R577,3	-50,1%
Take-away and fast food outlets (R million)	R1 346,3	R1 463,7	-8,0%
Restaurants and coffee shops (R million)	R1 244,3	R2 462,2	-49,5%
Total Industry (R million)	R2 878,9	R4 503,2	-36,1%

Source: Stats SA: Food and beverages data cuts, 23 March 2021

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: JANUARY 2021 COMPARED TO JANUARY 2020

Table 8 gives the total passenger arrivals at Airports Company South Africa (ACSA) airports during January 2021 compared to January 2020. Total passenger arrivals decreased by -71,5% moving from 1 829 188 in January 2020 to 520 435 in January 2021. International passengers recorded the highest decline of -88,8% followed by regional (-80,7%), domestic (-63,4%) and unscheduled (-48,4%).

Table 8: Arriving Passengers: January 2021 compared to January 2020

Arriving Passengers	Jan-21	Jan-20	% Change
International	63 822	567 329	-88,8%
Regional	6 900	35 816	-80,7%
Domestic	447 269	1 221 302	-63,4%
Unscheduled	2 444	4 741	-48,4%
Total	520 435	1 829 188	-71,5%

Source: ACSAs data cuts, March 2021

PASSENGER DEPARTURE MOVEMENT: JANUARY 2021 COMPARED TO JANUARY 2020

Table 9 shows the total passenger departing from Airports Company South Africa (ACSA) airports during January 2021 compared to January 2020. Total departing passengers decreased by -69,6%, from 1 784 527 in January 2021 to 542 929 in January 2020. The table further indicates that international passengers departing had the highest decline of -83,1% followed by regional (-82,3%), domestic (-63,6%) and unscheduled (-45,4%).

Table 9: Departing Passengers: January 2021 compared to January 2020

Departing Passengers	Jan-21	Jan-20	% Change
International	87 125	516 015	-83,1%
Regional	6 124	34 600	-82,3%

Domestic	447 140	1 229 256	-63,6%
Unscheduled	2 540	4 656	-45,4%
Total	542 929	1 784 527	-69,6%

Source: ACSAs data cuts, March 2021

References:

1. Statistics South Africa March 30th 2021, Tourism and Migration report.
2. Statistics South Africa, March 23rd 2021, Accommodation data cuts.
3. Statistics South Africa, March 23rd 2021, Food and Beverage data cuts.
4. Airports Company South Africa, February 2021. Data cuts.