

SUMMARY ANALYSIS OF SOUTH AFRICA'S TRAVELLERS (ARRIVALS AND DEPARTURES) DURING JULY 2020

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. The lockdown continued during July 2020 and as a result international tourists were still not allowed to enter South Africa during this month. 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. 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 July 2020, and this report provides an analysis of these travellers. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for July 2020 compared to July 2019 is also provided in this report.

TOTAL TRAVELLERS: JULY 2020 COMPARED JULY 2019

Table 1 indicates that in July 2020 there was a total of 202 937 travellers (arrivals, departures and transits) that passed through South African ports of entry, which was a decline of -93,9% compared to 3 323 714 travellers recorded in July 2019. Further analysis on the total travellers, including South African residents and foreign arrivals, is provided in Table 2 and 3 respectively.

Table 1: Total Arrivals and Departures: July 2020 compared to July 2019

Total Travellers	July-20	July-19	% Change
	202 937	3 323 714	-93,9%

Source: Stats SA Tourism and Migration report, July 2020

SOUTH AFRICAN RESIDENT TRAVELLERS: JULY 2020 COMPARED TO JULY 2019

Table 2 indicates that there was a total of 63 557 of South African resident travellers (arrivals and departure) recorded in July 2020, which was a decrease of -93,4% (-894 551) compared to the same month in 2019. Further analysis indicated that the number of South African arrivals declined by -94,2% while departures decreased by -92,4% in July 2020 when compared to July 2019. There were no South Africans on transit during July 2020.

Table 2: South African resident travellers: July 2020 compared to July 2019

South Africa Residents	July-20	July-19	% Change
Arrivals	30 473	522 117	-94,2%
Departures	33 084	435 202	-92,4%
Transits	0	789	-100,0%
Total	63 557	958 108	-93,4%

Source: Stats SA Tourism and Migration report, July 2020

The decline experienced was as a result of the lockdown in South Africa, which prevented people from leaving and entering the country. More information on these figures 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: JULY 2020 COMPARED TO JULY 2019

Table 3 shows foreign travellers by arrival, departure and transit for July 2020 compared to July 2019. Total foreign travellers decreased from 2 365 606 in 2019 to 139 380 in 2020, which was a decline of -94, 1% (-2 226 226). Further breakdown of the results indicated that the number of foreign arrivals and departures declined by -94,4% and -93,3% respectively during July 2020. There was a total of 53 transit foreign travellers recorded in July 2020.

Table 3: Foreign travellers: July 2020 compared to July 2019

Foreign Travellers	July-20	July-19	% Change
Arrivals	68 914	1 238 165	-94,4%
Departures	70 413	1 048 816	-93,3%
Transits	53	78 625	-99,9%
Total	139 380	2 365 606	-94,1%

Source: Stats SA Tourism and Migration report, July 2020

FOREIGN ARRIVALS BY REGION AND MODE OF TRAVEL: JULY 2020

Table 4 indicates foreign arrivals by region and mode of transport for July 2020. There was a total of 68 914 foreign arrivals recorded in July 2020 as already indicated. There were more foreign arrivals from Africa, a total of 67 988 (99,7% share), compared to 873 (1,3% share) of foreign arrivals from overseas during July 2020. Most of the foreign arrivals from the Africa region used road transport (67 728) while foreign arrivals from overseas used air transport (465).

Table 4: Foreign arrivals by region and mode of transport: July 2020

Region	Total	Air	Road	Sea
Overseas	873	465	283	125
Europe	484	280	110	94
North America	80	24	54	2
Central and South America	71	70	1	
Australasia	11	6	5	
Middle East	18	14	3	1
Asia	209	71	110	28
Africa	67 988	251	67 728	9
Unspecified	53	44	9	
Total	68 914	760	68 020	134

Source: Stats SA Tourism and Migration report, July 2020

SECTION TWO: PERFORMANCE OF SOUTH AFRICA’S TOURISM RELATED INDUSTRIES: JULY 2020 COMPARED TO JULY 2019

The next section of the report is about the performance of tourism related industries during July 2020 compared to July 2019.

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 5 March 2020, the South African government announced the first case of COVID-19 in the country. As a result of the increased levels of infection, the government announced a 21-day lockdown starting from 27 March 2020. 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. In July 2020, South Africa was under level three (3) lockdown restrictions. The results of the tourism related industries presented below should be viewed within the context of South Africa’s level 3 lockdown regulations, which were in place during July 2020.

2.1 ACCOMMODATION

ACCOMMODATION INDUSTRY INCOME: JULY 2020 COMPARED TO JULY 2019

During July 2020, the total income from the accommodation industry showed a decline of -90,5% compared to July 2019, a decrease from R1 964,7 million in July 2019 to R186,7 million in 2020. All categories of accommodation recorded a significant decline in income levels with caravan parks and camping sites recording the highest decline of -97,6%; followed by hotels (-90,5%); other accommodation (-90,3%) and guest houses and guest farms (-89,7%). Other accommodation includes lodges, bed-and-breakfast, self-catering, and ‘other’ establishments not classified. The significant decline in income levels, which were recorded in July 2020 could be attributed to COVID-19 level 3 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 5: Income from accommodation: July 2020 compared to July 2019

Type of Accommodation	July-2020	July 2019	% Change July 2020 compared to July 2019
Hotels (R million)	R118,3	R1 248,8	-90,5%
Caravan parks and camping sites (R million)	R0,5	R21,0	-97,6%
Guest houses and guest farms (R million)	R7,3	R71,0	-89,7%
Other accommodation (R million)	R60,6	R623,9	-90,3%
Total Industry (million)	R186,7	R1 964,7	-90,5%

Source: Stats SA: Accommodation data cuts, 22nd September 2020

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JULY 2020 COMPARED TO JULY 2019

Total industry occupancy rates, for July 2020 compared to July 2019, are provided in the table 6 below. The results show that the total industry occupancy rate for July 2020 recorded a decline, from a rate of 48,1% in July 2019 to 7,7% in July 2020. All categories of accommodation showed a decrease in occupancy rates in July 2020 compared to the same month last year. Occupancy rate for hotels dropped from 49,5% in July 2019 to 9,1% in July 2020. Occupancy rate for caravan parks and camping sites declined to 0,2% in July 2020 compared to 30,4% in July 2019, as well as that of guest houses and guest farms, to 4,2% in July 2020 compared to 34,9% in the same month last year. Other accommodation occupancy rate, including lodges, bed-and-breakfast, self-catering and 'other' establishments not classified, also showed a decline from 51,3% in July 2019 to 5,3% in July 2020.

Table 6: Occupancy rate: July 2020 compared to July 2019

Accommodation Category	July 2020	July 2019
Hotels	9,1	49,5
Caravan parks and camping sites	0,2	30,4
Guest houses and guest farms	4,2	34,9
Other accommodation	5,3	51,3
Total industry	7,7	48,1

Source: Stats SA: Accommodation data cuts, 22nd September 2020

2.2 FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JULY 2020 COMPARED TO JULY 2019

The results in the table 7 indicate that the total income of the food and beverages industry in July 2020 was about R 2 129,4 million, which was a decrease of -52,6% when compared to R4 490,7 million income for July 2019. All categories of food and beverages showed a decline in income with restaurants and coffee shops having the highest decrease of -75,9%, followed by catering services (-61,9%) and take-away and fast food outlets (-12,6%). The decline in income levels could be influenced by the country's level 3 lockdown regulations which were in place in July 2020, during which 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 7: Total income by type of food and beverage industry: July 2020 compared to July 2019

Categories of Food and Beverages	July 2020	July 2019	% Change
Catering services (million)	R255,7	R671	-61,9%
Take-away and fast food outlets (million)	R1 316,6	R1 507	-12,6%
Restaurants and coffee shops (million)	R557,1	R2 312,7	-75,9%
Total Industry (million)	R2 129,4	R4 490,7	-52,6%

Source: Stats SA: Food and beverages data cuts, 22nd September 2020

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: JULY 2020 COMPARED TO JULY 2019

Table 8 gives the total passenger arrivals at Airports Company South Africa (ACSA) airports during July 2020 compared to July 2019. Total passenger arrivals decreased by -93,9%, from 1 814 158 in July 2019 to 111 073 in July 2020. As mentioned previously, South Africa was under lockdown level 3 in the month of July, which prevented the movement of people across the borders.

Annexure A provides a list of flights arriving in South Africa during July 2020 to repatriate South Africans that were in other countries from the Department of International Relations and Cooperation. According to country's Risk Adjusted Strategy there was also limited domestic air travel, with a restriction on the number of flights per day and travel authorisation was mainly based on the reason for travel and subject to the ports of entry arrangements (South Africa government, 2020). The number of domestic passengers recorded in July 2020 were 105 155, which was a decrease of -91,4%, compared to 1 215 906 passengers in July 2019.

Table 8: Arriving Passengers: July 2020 compared to July 2019

Arriving Passengers	July 2020	July 2019	% Change July 2020 compared to July 2019
International	292	542 656	-99,9%
Regional	0	49 439	-100,0%
Domestic	105 155	1 215 906	-91,4%
Unscheduled	5 626	6 157	-8,6%
Total	111 073	1 814 158	-93,9%

Source: Stats SA: ACSAs data cuts, July 2020

PASSENGER DEPARTURE MOVEMENT: JULY 2020 COMPARED TO JULY 2019

Table 9 shows the total passenger departing from Airports Company South Africa (ACSA) airports during July 2020 compared to July 2019. Total departing passengers decreased by -93,1%, from 1 726 718 in July 2019 to 119 622 in July 2020. As mentioned previously South Africa was under lockdown 3 in the month of July, which prevented the movement of people across the borders, including provincial borders. There were no regional passengers departing from ACSA airports and only 60 international passengers departed during July 2020, which was a decline of 99,9% compared to the same month last.

Table 9: Departing Passengers: July 2020 compared to July 2019

Departing Passengers	July 2020	July 2019	% Change July 2020 compared to July 2019
International	60	452 520	-99,9%
Regional	0	51 082	-100,0%
Domestic	105 759	1 216 867	-91,3%
Unscheduled	13 803	6 249	120,9%
Total	119 622	1 726 718	-93,1%

Source: Stats SA: ACSAs data cuts, 22nd September 2020

Due to the restrictions of provincial travel, 105 759 domestic passengers departed in July 2020, which was a decline of -91,3% compared to 1 216 867 domestic travellers in July 2019. The number of passengers on unscheduled flights in July 2020 increased by 120, 9%; increasing from 6 249 in July 2019 to 13 803 in July 2020. The increase in unscheduled flights in July 2020 could be due to arranged

flights by the different embassies in South Africa for travellers who were unable to leave South Africa because of the lockdown restrictions put in place. Some of the flights include:

- 18 July 2020 Johannesburg (JNB)- Doha (DOH), Qatar Airways
- 17 July 2020 Johannesburg (JNB)- Frankfurt, Lufthansa Airways
- 19 July 2020 Johannesburg (JNB) -Addis Ababa (ADD), Ethiopian Airlines
- 23 July 2020 Cape Town (CPT)-Istanbul (IST), Turkish Airlines

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

July 2020
A flight from Zambia repatriated 12 South Africans
2 July 2020
A flight from Zambia repatriated nine South Africans
A flight from Malawi repatriated three South Africans
A flight from Zimbabwe repatriated 21 South Africans
4 July 2020
A flight from the Netherlands repatriated 228 South Africans
A flight from Mali, Ghana and Angola repatriated 18 South Africans
A flight from Nairobi repatriated 14 South Africans
A flight from the DRC repatriated 62 South Africans
A flight from Ghana repatriated four South Africans
5 July 2020
A flight from Saudi Arabia repatriated 101 South Africans
A flight from Ethiopia repatriated nine South Africans
6 July 2020
A flight from Cuba repatriated 140 South Africans
7 July 2020
A flight from Maputo repatriated 39 South Africans
A flight from Uganda repatriated 85 South Africans
8 July 2020
A flight from Ethiopia repatriated 26 South Africans
9 July 2020
A flight from the Seychelles repatriated 31 South Africans
A flight from Angola repatriated three South Africans
A flight from Turkey repatriated 17 South Africans
10 July 2020
A flight from the Netherlands repatriated 57 South Africans
A flight from Zimbabwe repatriated 26 South Africans
Two flights from Angola repatriated 40 and 52 South Africans respectively
A flight from Qatar repatriated 167 South Africans
A flight from Mozambique repatriated three South Africans
A flight from Tanzania repatriated three South Africans
11 July 2020
A flight from Tanzania repatriated 29 South Africans
A flight from the DRC repatriated 38 South Africans
12 July 2020
A flight from the Netherlands repatriated 150 South Africans
A flight from Zambia repatriated two South Africans
14 July 2020
A flight from Turkey repatriated eight South Africans
A flight from Mozambique repatriated 25 South Africans
15 July 2020
A flight from Ethiopia repatriated 28 South Africans
16 July 2020
A flight from Ghana and Sierra Leone repatriated 23 South Africans
A flight from Angola repatriated 10 South Africans
A flight from Namibia repatriated 38 South Africans
17 July 2020
A flight from the DRC repatriated six South Africans

A flight from the UAE repatriated 261 South Africans
A flight from the USA repatriated 201 South Africans
A flight from China repatriated 14 South Africans
A flight from Tanzania repatriated four South Africans
18 July 2020
A flight from the UK repatriated 201 South Africans
A flight from the UAE repatriated 49 South Africans
A flight from Qatar repatriated 303 South Africans
Two flights from the Netherlands repatriated 93 and 207 South Africans, respectively
19 July 2020
A flight from Ethiopia repatriated 18 South Africans
21 July 2020
A flight from Ethiopia repatriated two South Africans
A flight from Tanzania repatriated two South Africans
A flight from Malawi and Mozambique repatriated 26 South Africans
22 July 2020
A flight from Mauritius repatriated 62 South Africans
A flight from Zimbabwe repatriated 35 South Africans
A flight from Mozambique repatriated two South Africans
A flight from Austria repatriated four South Africans
A flight from Ethiopia repatriated 48 South Africans
23 July 2020
A flight from Turkey repatriated 24 South Africans
A flight from Zimbabwe repatriated two South Africans
A flight from Malawi repatriated 11 South Africans
A flight from Nigeria repatriated 53 South Africans
A flight from Uganda repatriated 21 South Africans
24 July 2020
A flight from the UAE repatriated 115 South Africans
A flight from Tanzania repatriated two South Africans
A flight from Zambia repatriated 50 South Africans
A flight from Ethiopia repatriated 11 South Africans
A flight from Qatar repatriated 16 South Africans
A flight from Angola repatriated 36 South Africans
A flight from the Netherlands repatriated 107 South Africans
25 July 2020
A flight from Tanzania repatriated 17 South Africans
A flight from Kenya repatriated 18 South Africans
A flight from Angola repatriated 26 South Africans
26 July 2020
A flight from the Netherlands repatriated 114 South Africans.

Source: http://www.dirco.gov.za/repatriation_newsletters/2020/repatriation-newsletter12_27-july-2020.pdf

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