

SUMMARY ANALYSIS OF TOURIST ARRIVALS: MARCH 2020

NOTE: This report provides an analysis of tourist arrivals for the period Jan-March 2020 compared to Jan-March 2019. The quarterly tourism performance report which will be released at the end of June 2020 will provide an analysis of the performance of other tourism related industries for the period Jan-March 2020 compared to Jan-March 2019. Some of the data for the quarterly performance report is still not available and therefore could not be include in this report. Annexure 3 provides a list of other indicators that will be included in the quarterly performance report and the indication of when the data is expected to be released.

Impact of Coronavirus (COVID-19) on tourist arrivals

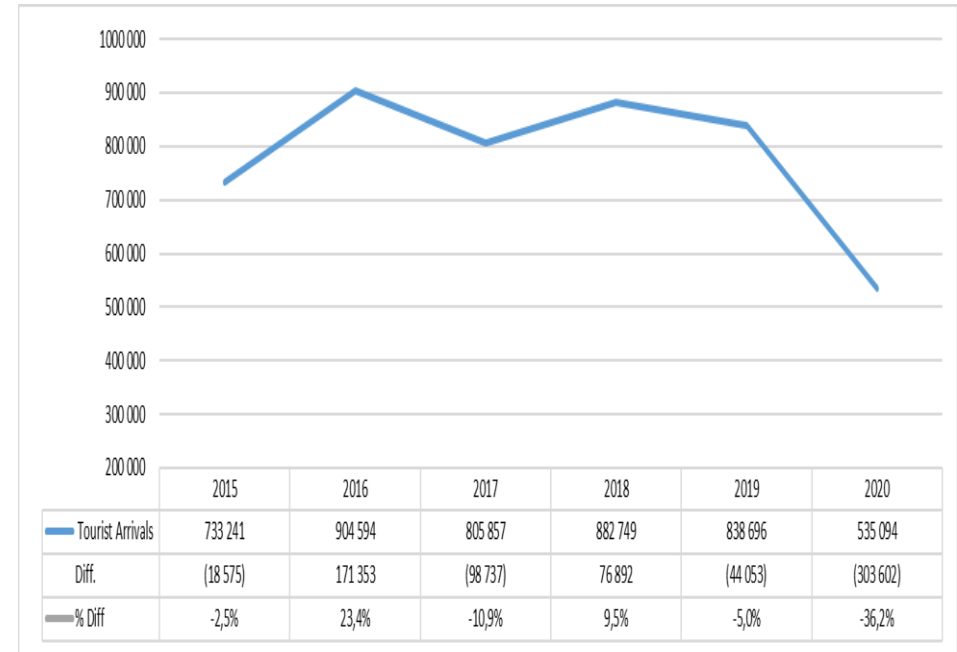
On 11 March 2020, the World Health Organisation (WHO), had declared the coronavirus (COVID-19) outbreak a pandemic (WHO, 2020). In order to limit the spread of COVID-19, many countries had started to introduce lockdown measures which prevented people from leaving their countries. On the 5th March 2020, 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 the 27th March 2020 which was extended by two more weeks. The lockdown prevented movement of people entering and leaving South Africa. The results below should therefore be viewed within the context of the impact of COVID-19 on travel since most tourist were unable to travel due to lockdown measures and the fear of being infected with the virus in other countries.

INTERNATIONAL TOURIST ARRIVALS TREND ANALYSIS: MARCH 2015 - MARCH 2020

A total of 535 094 tourist arrivals was recorded in March 2020, which was a decrease of -36.2% (303 602) compared to the same month in 2019. The decline experienced could be a result of the lockdown in South Africa which prevented people from leaving and entering the country as of 27th March 2020 and lockdown measures implemented in other countries. Furthermore, some countries were already on lockdown during this month.

Figure 1 indicates tourist arrivals for the period March 2015 to March 2020. Tourist arrivals increased from 733 241 in 2015 to 904 594 in 2016 which was an increase of 23.4% (171 353). Tourist arrivals decreased from 904 594 in 2016 to 805 857 in 2017, which was a decline of -10.5% (-98 737). Tourist arrivals increased by 9.5% (76 892) in March 2018 compared to the same month in 2017. Comparing March 2019 with March 2018, there was a decrease of -5.0% (-44 053) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals March 2015 to March 2020



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

MARCH 2020 COMPARED TO MARCH 2019 BY REGION

Table 1 indicates tourist arrivals by region for March 2020 compared to the same month in 2019. All regions experienced a decline in tourist arrivals during this month compared to the same month of the previous year. Asia recorded the highest decrease which was influenced by China having a decline of -90.6% (-6 954) in tourist arrivals during this month. Africa also recorded a decrease of -29.4% (-176 428) and this region

remains the main source of tourist arrivals to the country, accounting for 79.3% (424 280) of total tourist arrivals during this month.

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

Region	MARCH 2020	MARCH 2019	Diff	% Diff.
EUROPE	73 142	146 833	-73 691	-50,2%
NORTH AMERICA	17 773	42 273	-24 500	-58,0%
CENTRAL & SOUTH AMERICA	5 674	9 875	-4 201	-42,5%
AUSTRALASIA	5 329	9 320	-3 991	-42,8%
MIDDLE EAST	1 364	4 280	-2 916	-68,1%
ASIA	6 959	24 066	-17 107	-71,1%
TOTAL OVERSEAS	110 241	236 647	-126 406	-53,4%
AFRICA	424 280	600 708	-176 428	-29,4%
Unspecified	573	1 341	-768	-57,3%
GRAND TOTAL	535 094	838 696	-303 602	-36,2%

Source: Stats SA Tourism and Migration Report, March 2020

JANUARY-MARCH 2020 COMPARED TO JANUARY-MARCH 2019

Tourist arrivals figures by region for the period January-March 2020 compared to the same period in 2019 are indicated in Table 2. Total tourist arrivals (2 429 177) went down by -10.2% (-274 890) for the period January-March 2020 compared the same period in 2019 (2 704 067). Total tourist arrivals from the overseas market decreased by -16.1% (-115 085). Asia (-33.7%) recorded the highest decrease followed by North America (-19.8%), Europe (-13.4%), Australasia (-11.7%), Middle East (-8.8%) and Central and South America with a decrease of -7.6%. The highest declining growth recorded in Asia was from China with a decline of -55.0% (-14 073) followed by South Korea (-42.8%). Most counties in the Europe region had a decline in tourist arrivals except for Russian Federation which had an increase of 6.9% moving from 5 043 tourist arrival in Jan-March 2019 to 5 393 in Jan-March 2020. Similarly Brazil was the only country in the Central and South America which had experienced an increase of 6.1% (1 082) in tourist arrivals during the period under review. Most regions in the Middle East had also experienced a decline in tourist arrivals except for Saudi Arabia which doubled in growth (115,7%) moving from 1 431 during Jan-March 2019 to 3 087 during Jan-March 2020. Tourist arrivals from Africa decreased by -8.0% (-159 200) during the same period under review. In terms of volume, the decrease recorded from the continent was driven by a decrease of -6.3% (-39 320) from Zimbabwe, followed by Mozambique (-24 958/-6.7%) and Eswatini (-20 445/-9, 8%).

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

Region	Jan-Mar 2020	Jan-Mar 2019	Diff	% Diff
EUROPE	404 912	467 791	-62 879	-13,4%
NORTH AMERICA	82 173	102 409	-20 236	-19,8%
CENTRAL & SOUTH AMERICA	29 361	31 786	-2 425	-7,6%
AUSTRALASIA	23 520	26 634	-3 114	-11,7%
MIDDLE EAST	10 859	11 908	-1 049	-8,8%
ASIA	50 003	75 385	-25 382	-33,7%
TOTAL OVERSEAS	600 828	715 913	-115 085	-16,1%
TOTAL AFRICA	1 825 354	1 984 554	-159 200	-8,0%
Unspecified	2 995	3 600	-605	-16,8%
GRAND TOTAL	2 429 177	2 704 067	-274 890	-10,2%

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

Table 3 gives the rankings of the top ten African source markets for the period January-March 2020 compared to January-March 2019. Most of the top ten African source markets remained at the same position for the period under review except for Tanzania moving up from 11th position in 2019 to 10th position in 2020 removing Nigeria from the top 10. All of the top ten countries recorded a decline. Angola recorded the highest decline of -31,9% followed by Namibia (-19.8%), Zambia (-16.0%), Botswana (-11.4%), Malawi (-10.1%), Eswatini (-9.8%), Tanzania (-7.8%) Mozambique (-6.7%), Zimbabwe (-6.3%) and Lesotho with -4.4%.

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

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
Zimbabwe	1	582 694	1	622 014	-6,3%
Lesotho	2	413 724	2	432 756	-4,4%
Mozambique	3	345 026	3	369 984	-6,7%
Eswatini	4	188 948	4	209 393	-9,8%
Botswana	5	117 099	5	132 094	-11,4%
Malawi	6	43 325	6	48 212	-10,1%
Namibia	7	36 098	7	45 004	-19,8%
Zambia	8	31 659	8	37 708	-16,0%
Angola	9	13 558	9	19 899	-31,9%
Tanzania	10	8 459	11	9 176	-7,8%

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

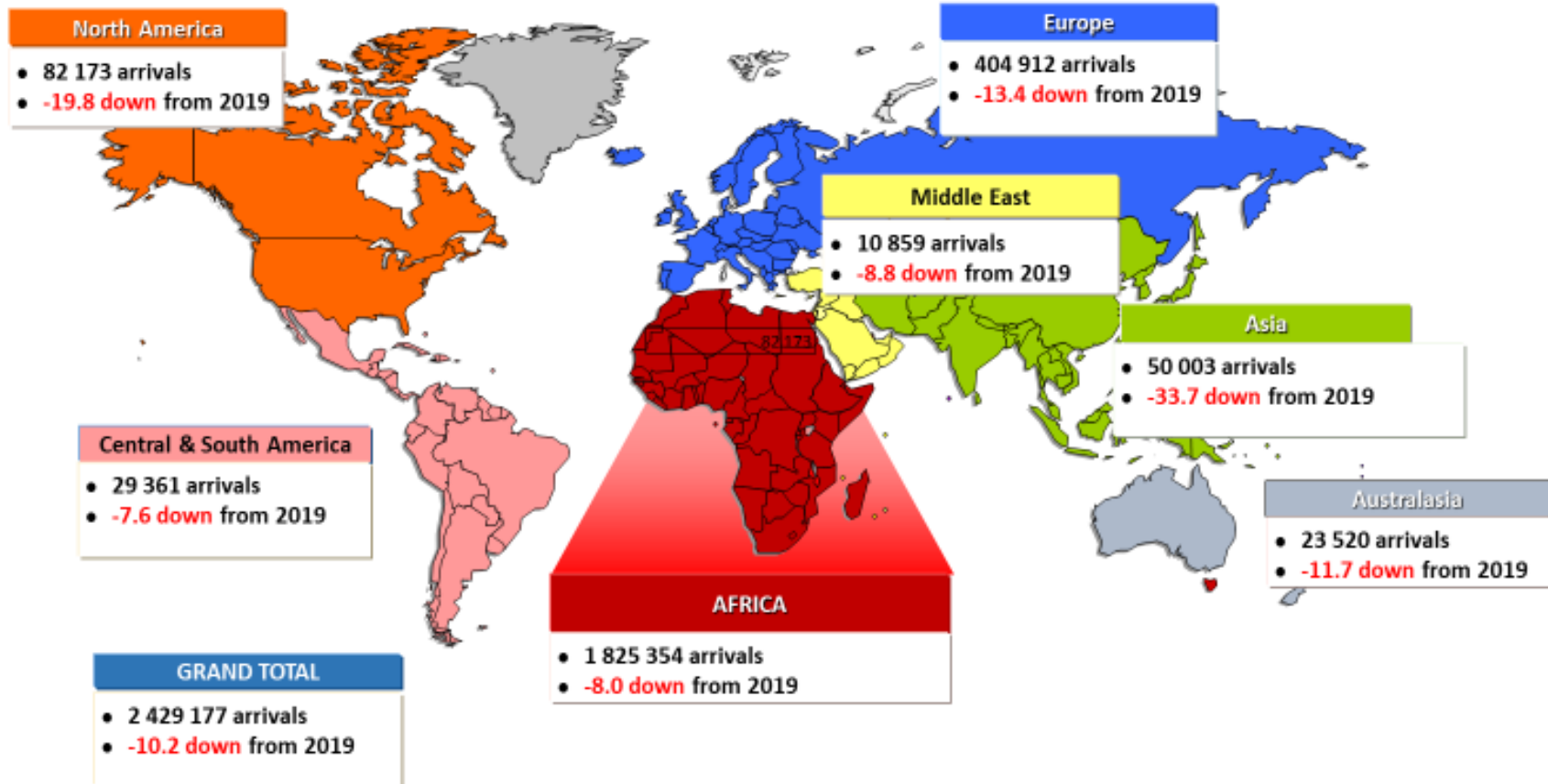
Table 4 shows the rankings of the top ten overseas source markets. Comparing January-March 2020 with January-March 2019, most of the top 10 overseas markets recorded a decrease in tourist arrivals except for Brazil (6.1%). Despite this decline, most of the top ten overseas markets remained in the same position for the period under review except for Brazil moving up from 10th position in 2019 to 7th position in 2020. Australia also moved from 7th position in 2019 to 6th position in 2020 and Switzerland moved from 11th position in 2019 to 10th position in 2020. China which was in the 6th position in 2019, moved out of the top 10 to the 11th position in 2020. UK remains the main source market from overseas recording a decline in growth of -14.1%.

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

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
UK	1	119 899	1	139 530	-14,1%
Germany	2	98 333	2	102 133	-3,7%
USA	3	66 016	3	83 185	-20,6%
France	4	37 470	4	48 292	-22,4%
The Netherlands	5	32 030	5	36 549	-12,4%
Australia	6	19 838	7	23 775	-16,6%
Brazil	7	18 866	10	17 784	6,1%
India	8	17 113	8	20 562	-16,8%
Canada	9	16 157	9	19 224	-16,0%
Switzerland	10	13 573	11	16 658	-18,5%











Source: Stats SA Tourism and Migration Report, March 2020

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













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

**TOP FIVE OVERSEAS
SOURCE MARKETS**

Country		Arrivals	
UK		119 899 -14.1% down from 2019	
Germany		98 333 -3.7% down from 2019	
USA		66 016 -20.6% down from 2019	
France		37 470 -22.4% down from 2019	
Netherlands		32 030 -12.4% down from 2019	

**TOP FIVE AFRICA
SOURCE MARKETS**

Country		Arrivals	
Zimbabwe		582 694 -6.3% down from 2019	
Lesotho		413 724 -4.4% down from 2019	
Mozambique		345 026 -6.7% down from 2019	
Eswatini		188 948 -9.8% down from 2019	
Botswana		117 099 -11.4% down from 2019	

ANNEXURE 3: DATA COLLECTION STATUS OF INDICATORS REPORTED TO BE INCLUDED IN THE QUARTERLY TOURISM PERFORMANCE REPORT: Q1 2020

Indicators	Data Source	Data collected to date	Data outstanding
South Africa Tourist Arrivals Performance			
South Africa Tourist Arrivals	Statistics South Africa: Tourism and Migration report	Quarter one (Jan-March) 2020 data has been collected	None
South Africa related tourism industries performance			
Total income from Accommodation, total stay units available and occupancy rates by type of accommodation	Statistics South Africa: Accommodation Report	Jan and Feb 2020 data has been released by Stats SA	March 2020 is expected to be released on the 22 June 2020
	STR Global Hotel: South Africa	Jan-April 2020 data has been released	None
Total Income from Food and Beverages by type	Statistics South Africa: Food and Beverages report	Jan and Feb 2020 data has been released by Stats SA	March 2020 is expected to be released on the 22 June 2020
Aviation (Total passengers and total aircraft movements)	Airports Company South Africa	Jan-March 2020 data has been released. April 2020 data has also been released.	None
South Africa direct tourism employment estimates			
Tourism Employment	Statistics South Africa: Quarterly Labour Force Survey (QLFS), quarter one: 2020	None	The results of the QLFS is expected to be released on the 23 rd June 2020
Global inbound tourism performance			
Global Tourist arrivals	UNWTO Barometer	Jan-March 2020 tourist arrivals by region has been released	None
Global related tourism industries performance			
Aviation	IATA: Air Passenger Market Analysis	Jan-March 2020 performance has been released	None
Accommodation	STR Global Hotel: Global	Jan-March 2020 performance by region has been released	None