

## **SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR MARCH 2021**

**NOTE:** To limit the spread of COVID-19 and prepare the health care sector, the South African government announced a 21-day national lockdown from 27 March 2020, which prevented the movement of people entering and leaving South Africa. 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, between 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 export specific cargo and permitted retail goods to neighbouring countries, which included all goods imported via South African ports of entry.

During March 2021, South Africa was under adjusted alert level 1, which allowed for international tourists to travel to the country subject to restrictions. These restrictions stipulated that all travellers visiting the country will be expected to abide by the regulations that 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 tourist arrivals during March 2021, and this report provides a further analysis of the tourists that travelled to South Africa during March 2021. A detailed quarterly performance report for Jan-March 2021 will be published at the end of June 2021. Annexure one provides a list of the indicators to be included in the next quarterly performance report.

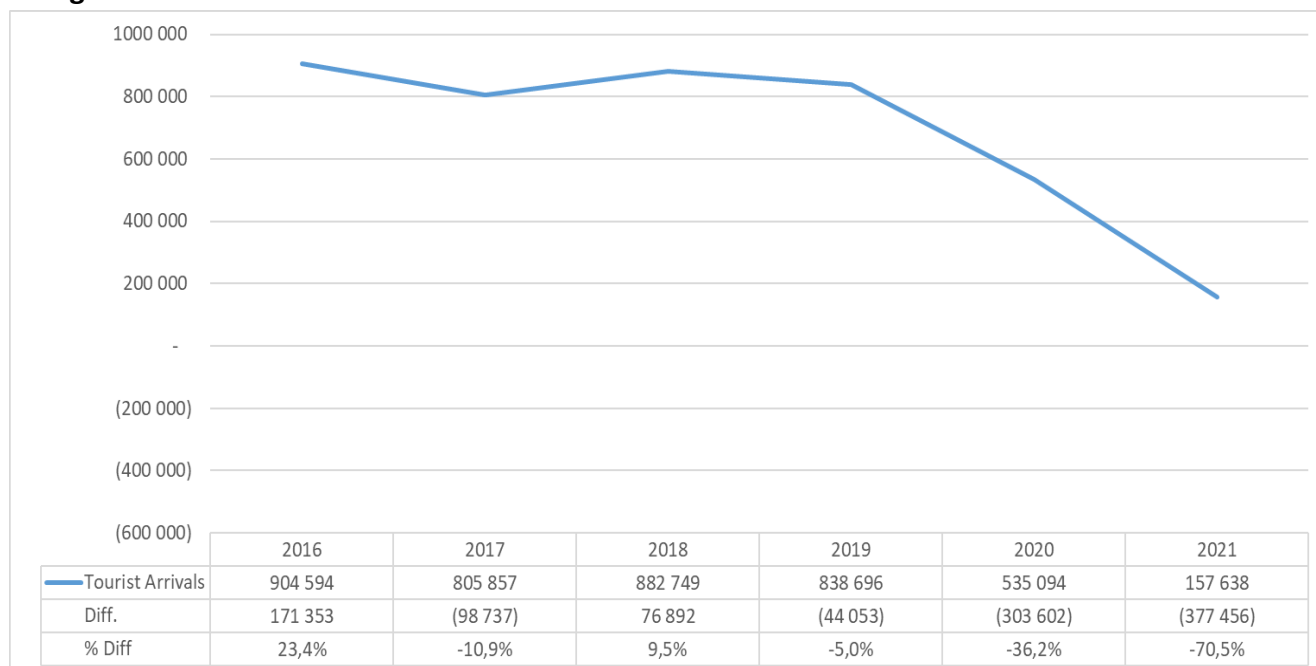
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### **TREND ANALYSIS: MARCH 2016 – MARCH 2021**

A total of 157 638 tourist arrivals was recorded in March 2021, which was a decrease of -70,5% (-377 456) compared to the same month in 2020. The decline experienced could be as a result of the impact of COVID-19 pandemic and the subsequent introduction of travel restrictions at a country level.

Figure 1 below indicates tourist arrivals for the period March 2016 to March 2021. Tourist arrivals decreased from 904 594 in 2016 to 805 857 in 2017, which was a decline of -10,9% (-98 737). Tourist arrivals then increased from 805 857 in 2017 to 882 749 in 2018, which was a positive growth of 9,5% (76 892). However, tourist arrivals decrease by -5,0% (-44 053) in March 2019 compared to the same month in 2018. Comparing March 2020 with March 2019, there was a decline of -36,2% (-303 602) in tourist arrivals during this period.

**Figure 1: Total Tourist Arrivals March 2016 to March 2021**



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

### MARCH 2021 COMPARED TO MARCH 2020 BY REGION

Table 1 below shows tourist arrivals by region for March 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 -95,3% (-5 078) followed by Central and South America (-91,3%; -5 181) and Europe (-86,9%; -63 587). Africa also recorded a decline of -67,1% (-284 486) and this region remains the main source of tourist arrivals to the country, accounting for 88,7% (139 794) of total tourist arrivals during this month.

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

| Region                  | MARCH 2021     | MARCH 2020     | Diff            | % Diff.       |
|-------------------------|----------------|----------------|-----------------|---------------|
| EUROPE                  | 9 555          | 73 142         | -63 587         | -86,9%        |
| NORTH AMERICA           | 2 922          | 17 773         | -14 851         | -83,6%        |
| CENTRAL & SOUTH AMERICA | 493            | 5 674          | -5 181          | -91,3%        |
| AUSTRALASIA             | 251            | 5 329          | -5 078          | -95,3%        |
| MIDDLE EAST             | 593            | 1 364          | -771            | -56,5%        |
| ASIA                    | 3 734          | 6 959          | -3 225          | -46,3%        |
| <b>TOTAL OVERSEAS</b>   | <b>17 548</b>  | <b>110 241</b> | <b>-92 693</b>  | <b>-84,1%</b> |
| <b>AFRICA</b>           | <b>139 794</b> | <b>424 280</b> | <b>-284 486</b> | <b>-67,1%</b> |
| Unspecified             | 296            | 573            | -277            | -48,3%        |
| <b>GRAND TOTAL</b>      | <b>157 638</b> | <b>535 094</b> | <b>-377 456</b> | <b>-70,5%</b> |

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

## JANUARY-MARCH 2021 COMPARED TO JANUARY-MARCH 2020

Tourist arrivals figures by region for the period January-March 2021 compared to the same period in 2020 are indicated in table 2 below. Total tourist arrivals went down by -84,1% for the period January-March 2021 compared the same period in 2020. This was a decline from a total of 2 429 177 tourist arrivals during the first three months of 2020 to 386 937 (-2 042 240) during the same period in 2021. Total tourist arrivals from the overseas market decreased by -93,0% (-558 848). Australasia (-97,3%) recorded the highest negative growth followed by Central and South America (-95,8%), Europe (-93,9%), North America (-92,1%), Middle East (-89,3%) and Asia (-84,4%). In Australasia, Australia had the highest decline in volume of -19 310 (-97,3%) followed by New Zealand (-3 535; -97,1%). In Central and South America, Brazil recorded the highest decline in volume (-18 159; -96,3%) for the period under review. The United Kingdom had the highest decline in volume (-115 463; -96,3%) in the Europe region. Tourist arrivals from Africa region decreased by -81,1% (-1 481 069) during the same period under review, and this decline in volume was driven by Zimbabwe (-493 676; -84,7%), followed by Lesotho (-350 259; -84,7%) and Mozambique (-252 256; -73,1%), refer to table 3 below.

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

| Region                  | Jan-Mar 2021   | Jan-Mar 2020     | Diff              | % Diff        |
|-------------------------|----------------|------------------|-------------------|---------------|
| EUROPE                  | 24 640         | 404 912          | -380 272          | -93,9%        |
| NORTH AMERICA           | 6 494          | 82 173           | -75 679           | -92,1%        |
| CENTRAL & SOUTH AMERICA | 1 235          | 29 361           | -28 126           | -95,8%        |
| AUSTRALASIA             | 640            | 23 520           | -22 880           | -97,3%        |
| MIDDLE EAST             | 1 158          | 10 859           | -9 701            | -89,3%        |
| ASIA                    | 7 813          | 50 003           | -42 190           | -84,4%        |
| <b>TOTAL OVERSEAS</b>   | <b>41 980</b>  | <b>600 828</b>   | <b>-558 848</b>   | <b>-93,0%</b> |
| <b>TOTAL AFRICA</b>     | <b>344 285</b> | <b>1 825 354</b> | <b>-1 481 069</b> | <b>-81,1%</b> |
| Unspecified             | 672            | 2 995            | -2 323            | -77,6%        |
| <b>GRAND TOTAL</b>      | <b>386 937</b> | <b>2 429 177</b> | <b>-2 042 240</b> | <b>-84,1%</b> |

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

Table 3 below gives the rankings of the top ten African source markets for the period January-March 2021 compared to January-March 2020. Most of the top ten African source markets moved their positions except for Eswatini, which ranked in 4th position in Jan-Mar 2020 & 2021. Mozambique, Namibia, Zambia, Nigeria and the Democratic Republic of Congo (DRC) all moved up their positions in 2021. Nigeria replaced Angola moving from the 11<sup>th</sup> position in Jan-Mar 2020 to 9<sup>th</sup> position in Jan-Mar 2021, whilst the DRC replaced Tanzania moving from the 12<sup>th</sup> position to the 10<sup>th</sup> position. Zimbabwe and Lesotho dropped their positions, from 1<sup>st</sup> position to 2<sup>nd</sup> position and from 2<sup>nd</sup> position to 3<sup>rd</sup> position respectively during the period under review. In 2021, Botswana also moved down one position, from 5<sup>th</sup> position to 6<sup>th</sup> position, whilst Malawi dropped two positions to be in the 8<sup>th</sup> position. All of the top ten countries recorded a decline with Botswana recording the highest negative growth of -87,3%, followed by Eswatini (-84,8%), Lesotho (-84,7%) and Zimbabwe (-84,7%).

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

| Country    | Rank-2021 | Tourist Arrivals 2021 | Rank-2020 | Tourist Arrivals 2020 | % Change from 2020 to 2021 |
|------------|-----------|-----------------------|-----------|-----------------------|----------------------------|
| Mozambique | 1         | 92 770                | 3         | 345 026               | -73,1%                     |
| Zimbabwe   | 2         | 89 018                | 1         | 582 694               | -84,7%                     |
| Lesotho    | 3         | 63 465                | 2         | 413 724               | -84,7%                     |
| Eswatini   | 4         | 28 649                | 4         | 188 948               | -84,8%                     |
| Namibia    | 5         | 18 179                | 7         | 36 098                | -49,6%                     |
| Botswana   | 6         | 14 891                | 5         | 117 099               | -87,3%                     |
| Zambia     | 7         | 13 136                | 8         | 13 136                | -58,5%                     |
| Malawi     | 8         | 8 743                 | 6         | 43 325                | -79,8%                     |
| Nigeria    | 9         | 2 785                 | 11        | 8183                  | -66,0%                     |
| DRC        | 10        | 2 525                 | 12        | 6352                  | -60,2%                     |

Source: Stats SA and tourist arrivals data cuts

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-March 2021 with January-March 2020, all of the top 10 overseas markets recorded a decrease in tourist arrivals and a majority of overseas source markets moved their positions except for Germany and Switzerland which ranked in 2<sup>nd</sup> and 10<sup>th</sup> position respectively. USA replaced UK as the main overseas source market despite experiencing a decline of -91,3%. In the 2021 top ten list, Brazil, Australia and Canada were replaced by Russian Federation, Pakistan and China.

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

| Country            | Rank-2021 | Tourist Arrivals 2021 | Rank-2020 | Tourist Arrivals 2020 | % Change from 2020 to 2021 |
|--------------------|-----------|-----------------------|-----------|-----------------------|----------------------------|
| USA                | 1         | 5 742                 | 3         | 66 016                | -91,3%                     |
| Germany            | 2         | 4 938                 | 2         | 98 333                | -95,0%                     |
| UK                 | 3         | 4 436                 | 1         | 119 899               | -96,3%                     |
| India              | 4         | 3 121                 | 8         | 17 113                | -81,8%                     |
| France             | 5         | 2 591                 | 4         | 37 470                | -93,1%                     |
| Russian Federation | 6         | 2 083                 | 20        | 5392                  | -61,4%                     |
| The Netherlands    | 7         | 1 700                 | 5         | 11 516                | -94,7%                     |
| China              | 8         | 1 388                 | 12        | 32 030                | -87,9%                     |
| Pakistan           | 9         | 1 341                 | 29        | 3358                  | -60,1%                     |
| Switzerland        | 10        | 1 058                 | 10        | 13 573                | -92,2%                     |

Source: Stats SA and tourist arrivals data cuts

**References:**

1. Statistics South Africa May 25<sup>th</sup> 2021, Tourism and Migration report.

**ANNEXURE 1: INDICATORS TO BE REPORTED TO BE IN THE QUARTERLY TOURISM PERFORMANCE REPORT:  
JAN-MARCH 2020**

| <b>Indicators</b>   | <b>Data Source</b>   |
|---|--|
| <b>South Africa Tourist Arrivals Performance</b>  |  |
| South Africa Foreign Arrivals (Jan-March 2021)  | Statistics South Africa: Tourism and Migration report                              |
| <b>South Africa related tourism industries performance</b>  |  |
| Total income from Accommodation, total stay units available and occupancy rates by type of accommodation                | Statistics South Africa: Accommodation Report                                      |
| South Africa Hotel Performance<br>-Occupancy Rate<br>- Average Daily Rate (Rand)<br>- Revenue per available room (Rand) | STR Hotel data   |
| Total Income from Food and Beverages by type  | Statistics South Africa: Food and Beverages report                                 |
| Aviation (Total passengers and total aircraft movements)  | Airports Company South Africa  |
| <b>South Africa direct tourism employment estimates</b>   |  |
| Employment in the tourism related industries  | Statistics South Africa: Quarterly Labour Force Survey (QLFS), quarter three: 2020 |
| <b>Global inbound tourism performance</b>   |  |
| Global Tourist arrivals   | UNWTO Barometer  |
| <b>Global related tourism industries performance</b>  |  |
| Aviation<br>-Revenue passenger kilometres<br>- Available Seat per Kilometre<br>- Passenger load factor                  | IATA: Air Passenger Market Analysis  |