

SUMMARY ANALYSIS OF SOUTH AFRICA'S TRAVELLERS (ARRIVALS AND DEPARTURES) DURING OCTOBER 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. 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.

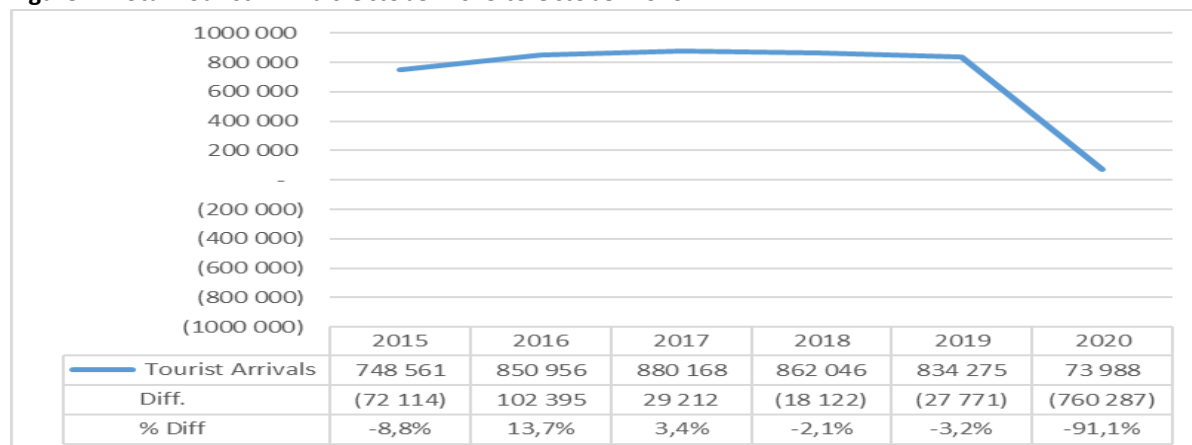
In October 2020, South Africa was under lockdown level one which allowed for international tourists to travel to the country subject. These restrictions included that all travellers visiting the country will be expected to abide by the regulations which include mandatory wearing of masks at all times, 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 October 2020, and this report provides a further analysis of the tourists that travelled to South Africa during October 2020. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for October 2020 compared to October 2019 is also provided in this report.

TREND ANALYSIS: OCTOBER 2015 – OCTOBER 2020

A total of 73 988 tourist arrivals was recorded in October 2020, which was a decrease of -91.1% (-760 287) compared to the same month in 2019. The decline experienced could be as 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.

Figure 1 below also indicates tourist arrivals for the period October 2015 to October 2020. Tourist arrivals increased from 748 561 in 2015 to 850 956 in 2016 which was an increase of 13.7% (102 395). Tourist arrivals further increased from 850 956 in 2016 to 880 168 in 2017, which was an increase of 3.4% (29 212). Tourist arrivals however decreased by -2.1% (-18 122) in October 2018 compared to the same month in 2017. Comparing October 2019 with October 2018, there was a decrease of -3.2% (-27 771) in tourist arrivals during this period.

Figure 1: Total Tourist Arrivals October 2015 to October 2020



Source: Stats SA Tourism and Migration report, October 2020

OCTOBER 2020 COMPARED TO OCTOBER 2019 BY REGION

Table 1 indicates tourist arrivals by region for October 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. Central and South America recorded the highest decrease which was influenced by Brazil having a decline of -99.2% (-6 984) in tourist arrivals during this month. Africa also recorded a decrease of -88.8% (-518 742) and this region remains the main source of tourist arrivals to the country, accounting for 88.5% (65 485) of total tourist arrivals during this month.

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

Region	OCTOBER 2020	OCTOBER 2019	Diff	% Diff.
EUROPE	4 856	158 332	-153 476	-96,9%
NORTH AMERICA	855	34 393	-33 538	-97,5%
CENTRAL & SOUTH AMERICA	120	10 423	-10 303	-98,8%
AUSTRALASIA	212	10 442	-10 230	-98,0%
MIDDLE EAST	253	6 524	-6 271	-96,1%
ASIA	2 029	28 559	-26 530	-92,9%
TOTAL OVERSEAS	8 325	248 673	-240 348	-96,7%
AFRICA	65 485	584 227	-518 742	-88,8%
Unspecified	178	1 375	-1 197	-87,1%
GRAND TOTAL	73 988	834 275	-760 287	-91,1%

Source: Stats SA Tourism and Migration Report, October 2020

Table 1.1: South Africa's Top 10 African Source Markets: October 2020 vs. October 2019

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
---------	-----------	-----------------------	-----------	-----------------------	----------------------------

Zimbabwe	1	18 806	1	170 700	-89,0%
Mozambique	2	14 917	3	105 046	-85,8%
Eswatini	3	7 192	4	75 315	-90,5%
Lesotho	4	6 312	2	115 027	-94,5%
Namibia	5	5 982	7	13 244	-54,8%
Zambia	6	4 142	8	11 979	-65,4%
Botswana	7	3 024	5	51 251	-94,1%
Malawi	8	2 016	6	17 087	-88,2%
Tanzania	9	557	10	3 225	-82,7%
DRC	10	505	11	2 266	-77,7%

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

Table 1.2: South Africa's Top 10 Overseas Source Markets: October 2020 vs. October 2019

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
Germany	1	1 140	1	40 840	-97,2%
UK	2	1 085	2	37 164	-97,1%
Pakistan	3	751	23	1 050	-28,5%
USA	4	614	3	27 354	-97,8%
France	5	345	4	19 412	-98,2%
India	6	293	7	8 509	-96,6%
China	7	248	8	7 969	-96,9%
Canada	8	241	9	7 039	-96,6%
Switzerland	9	228	11	6 877	-96,7%
The Netherlands	10	217	5	15 516	-98,6%

Source: Stats SA Tourism and Migration Report, October 2020

JANUARY-OCTOBER 2020 COMPARED TO JANUARY–OCTOBER 2019

Tourist arrivals figures by region for the period January-October 2020 compared to the same period in 2019 are indicated in Table 2 below. Total tourist arrivals (2 503 165) went down by -70.2% (-5 893 853) for the period January-October 2020 compared the same period in 2019 (8 397 018). The decline is due to the national lockdown which prevented tourists from entering the country during the months of April-September in 2020.

Table 2: Total Tourist Arrivals by month: 2020 compared to 2019

	Jan	Feb	March	April	May	June	July	Aug	Sep	October	Jan-October Total	% Diff
2020	1 093 268	800 815	535 094	0	0	0	0	0	0	73 988	2 503 165	-70,2%
2019	1 068 190	797 181	838 696	903 059	753 517	734 554	790 187	896 978	780 381	834 275	8 397 018	-2,2%

Source: Stats SA Tourism and Migration data January - October 2020.

Total tourist arrivals from the overseas market decreased by -71.1% (-1 499 074). Asia (-80,3%) recorded the highest decrease followed by North America (-77.4%), Australasia (-77.1%), Middle East (-76.5%), Central and South America (-69,8%) and Europe with a decrease of -66.6%. Tourist arrivals from Africa decreased by -69.9% (-4 385 404) during the same period under review.

Table 3: Total Tourist Arrivals by Region Jan-Oct 2020 vs. Jan-Oct 2019

Region	Jan-October 2020	Jan-October 2019	Diff	% Diff
EUROPE	409 768	1 228 413	-818 645	-66,6%
NORTH AMERICA	83 028	367 417	-284 389	-77,4%
CENTRAL & SOUTH AMERICA	29 481	97 670	-68 189	-69,8%
AUSTRALASIA	23 732	103 718	-79 986	-77,1%
MIDDLE EAST	11 112	47 285	-36 173	-76,5%
ASIA	52 032	263 724	-211 692	-80,3%
TOTAL OVERSEAS	609 153	2 108 227	-1 499 074	-71,1%
TOTAL AFRICA	1 890 839	6 276 243	-4 385 404	-69,9%
Unspecified	3 173	12 548	-9 375	-74,7%
GRAND TOTAL	2 503 165	8 397 018	-5 893 853	-70,2%

Source: Stats SA Tourism and Migration data January - October 2020.

Table 4 below gives the rankings of the top ten African source markets for the period January-October 2020 compared to January-October 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. Botswana recorded the highest decline of -77,1% followed by Eswatini (-74.0%), Angola (-73.5%), Malawi (-72.2%), Namibia (-71.5%), Zambia (-71.4%), Tanzania (-70.9%) Lesotho (-68.1%), Zimbabwe (-67.8%) and Mozambique with -67.6%.

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

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
Zimbabwe	1	601 500	1	1 867 886	-67,8%
Lesotho	2	420 036	2	1 315 471	-68,1%
Mozambique	3	359 943	3	1 109 950	-67,6%
Eswatini	4	196 140	4	754 300	-74,0%
Botswana	5	120 123	5	524 653	-77,1%

Malawi	6	45 341	6	163 388	-72,2%
Namibia	7	42 080	7	147 816	-71,5%
Zambia	8	35 801	8	125 063	-71,4%
Angola	9	13 846	9	52 160	-73,5%
Tanzania	10	9 016	11	31 018	-70,9%

Source: Stats SA Tourism and Migration data January - October 2020.

Table 5 shows the rankings of the top ten overseas source markets. Comparing January-October 2020 with January-October 2019, all of the top 10 overseas markets recorded a decrease in tourist arrivals. 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 9th position in 2019 to 7th position in 2020. Canada also moved from 10th position in 2019 to 9th position in 2020 and Switzerland moved from 13th position in 2019 to 10th position in 2020. UK remains the main source market from overseas recording a decline in growth of -64.7%.

Table 5: South Africa's Top 10 Overseas Source Markets: Jan-Oct 2020 vs. Jan-Oct 2019

Country	Rank-2020	Tourist Arrivals 2020	Rank-2019	Tourist Arrivals 2019	% Change from 2019 to 2020
UK	1	120 984	1	342 864	-64,7%
Germany	2	99 473	3	247 806	-59,9%
USA	3	66 630	2	313 511	-78,7%
France	4	37 815	4	136 147	-72,2%
The Netherlands	5	32 247	5	116 343	-72,3%
Australia	6	19 997	6	91 165	-78,1%
Brazil	7	18 921	9	60 996	-69,0%
India	8	17 406	7	81 316	-78,6%
Canada	9	16 398	10	53 906	-69,6%
Switzerland	10	13 801	13	42349	-67,4%

Source: Stats SA Tourism and Migration data January - October 2020.

SECTION TWO: PERFORMANCE OF SOUTH AFRICA'S TOURISM RELATED INDUSTRIES: OCTOBER 2020 COMPARED TO OCTOBER 2019

The next section of the report is about the performance of tourism related industries during October 2020 compared to October 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 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. As of 21 September, to date the country has been on level 1 which includes the month of October 2020. Table 5 below provides a summary of the level 1 lockdown regulations for the accommodation, food and beverage and aviation industries. Under level 1 most of the lockdown restrictions were removed for the tourism related 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 6: South Africa COVID-19 level 3, 2 and 1 regulations for the accommodation, food and beverages and aviation industries

Accommodation
Level 1
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
Level 1
Restaurants, fast food outlets and coffee shops all allowed to operate including onsite consumption of alcohol subject to the strict adherence to all health protocols.
Aviation
Level 1
Domestic air travel allowed. International travel allowed as of 01 October 2020.

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

2.1 ACCOMMODATION INDUSTRY: OCTOBER 2020

ACCOMMODATION INDUSTRY INCOME: OCTOBER 2020 COMPARED TO OCTOBER 2019

Table 7 below provides the total income from the accommodation industry including income for restaurants, bar sales and other income for October 2020 compared to October 2019. During October 2020, the total income (current prices) from the accommodation industry recorded a decline of -66,5% compared to October 2019. Total income from restaurants, bar sales and other income was more than the total income from accommodation only in the hotel industry in October 2020 and October 2019. Other categories recorded more income from accommodation as compared to income from restaurants, bar sales and other income. However, total income from all categories recorded a decline with total income from hotels recording the highest decline of about -70.0% moving from R3 275,5 million in October 2019 to R 983,0 million in October 2020.

Table 7: Income from accommodation (current prices: October 2020 compared to October 2019)

Type of Accommodation	Oct-20 Restaurants , bar sales and other income	Oct-20 Accommodation only	Oct-20 Total income	Oct-19 Restaurants, bar sales and other income	Oct-19 Accommodation only	Oct-19 Total income	% Change October 2020 compared to October 2019
Hotels (R million)	R573,9	R409,1	R983,0	R1 820,1	R1 455,4	R3 275,5	-70,0%
Caravan parks and camping sites (R million)	R0,1	R15,8	R15,9	R2,0	R20,6	R22,6	-29,6%
Guest houses and guest farms (R million)	R10,2	R40,7	R50,9	R15,0	R76,1	R91,1	-44,1%
Other accommodation (R million)	R85,0	R305,2	R390,2	R150,7	R755,9	R906,6	-57,0%
Total Industry - (R million)	R669,2	R770,8	R1 440,0	R1 987,8	R2 308,0	R4 295,8	-66,5%

Source: Stats SA: Accommodation data cuts, 7th December 2020

Table 8 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went down by -66,6% during the same period under review. All categories of accommodation recorded a decline in income levels with hotels recording the highest decline of -71,9%; followed by other accommodation (-59,6%), guest houses and guest farms (-46,5%) and caravan parks and camping sites (-23,3%). Other accommodation includes lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified.

Table 8: Income from Accommodation (Excluding restaurants, bar sales and other income: October 2020)

Type of Accommodation	October 2020 Accommodation only	October 2019 Accommodation only	% Change October 2020 compared to October 2019
Hotels (R million)	R409,1	R1 455,4	-71,9%
Caravan parks and camping sites (R million)	R15,8	R20,6	-23,3%
Guest houses and guest farms (R million)	R40,7	R76,1	-46,5%
Other accommodation (R million)	R305,2	R755,9	-59,6%
Total Industry – (R million)	R770,8	R2 308,0	-66,6%

Source: Stats SA: Accommodation data cuts, 7th December 2020

The percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) from January to October 2020 is provided in table 3 below. Income from accommodation recorded an increase of 4,7% and 8,1% during January and February 2020

respectively compared to the same months in 2019. This was an improvement compared to the decline recorded during the same months in 2019 compared to 2018.

Income from accommodation recorded a decline from March to October 2020 compared to the same months in 2019. The highest decline was recorded in May (-98,1%) and April (-98,0%) 2020 compared to the same months in 2019. Although the income from accommodation continued to record a decline in October 2020 compared to the same month in 2019, the decline recorded was the lowest since April 2020 compared to the same months is 2019. This could be due to regulations being relaxed during this period. In October 2020 hotels and other accommodation facilities were reopened for leisure travel between provinces and this might have led to the improvement.

Table 9: Year on Year Change in income from Accommodation

MONTH	2019	2020
January	-3,4%	4,7%
February	-3,2%	8,1%
March	0,2%	-41,7%
April	2,7%	-98,0%
May	3,1%	-98,1%
June	7,2%	-94,2%
July	2,8%	-91,0%
August	4,7%	-82,4%
September	7,4%	-73,2%
October	1,8%	-66,6%

Source: Stats SA: Accommodation data cuts, 7th December 2020

ACCOMMODATION INDUSTRY OCCUPANCY RATE: OCTOBER 2020 COMPARED TO OCTOBER 2019

Table 10 below indicates occupancy rates by accommodation type from Jan to October 2020 compared to the Jan-October 2019. The total accommodation occupancy rate recorded in October 2020 was 22,7% which was a decline compared to 50,6% in October 2019. The occupancy rate of all accommodation establishments was at its lowest from March to October 2020 compared to the same months in 2019. The lowest occupancy rate was recorded May 2020 (1,2%) and in April (1,4%) which could be due to the level five and four COVID-19 lockdown regulations during these months which prevented the accommodations establishments from operating except for quarantine and essential services. However, even if the occupancy rate was still low from June 2020, there was an improvement on month to month occupancy rate between June and October 2020 as indicated in the table below. This could be an indication of improvement when regulations were relaxed especially from June 2020.

Table 10: Occupancy Rate: Jan-October 2020 compared to Jan-October 2019

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jan 2019	45,9%	27,4%	40,9%	45,3%	44,4%
Jan 2020	46,0%	26,3%	39,1%	46,8%	44,7%
Feb 2019	54,4%	26,1%	44,1%	48,3%	50,7%
Feb 2020	53,9%	25,6%	37,9%	48,0%	49,8%
March 2020	30,5%	25,3%	25,1%	32,9%	30,4%
March 2019	51,6%	31,1%	40,5%	51,7%	49,8%
April 2020	1,70%	0,30%	0,80%	1,00%	1,4%
April 2019	48,9%	29,3%	33,0%	48,7%	46,7%
May 2020	1,3%	0,3%	0,3%	1,2%	1,2%

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
May 2019	44,8%	29,9%	30,1%	43.5%	42,6%
June 2020	4,1%	0,3%	1,3%	3,9%	3,6%
June 2019	47,1%	32,8%	32,4%	47.6%	45,5%
July 2020	6,1%	0,2%	3,9%	5,1%	5,4%
July 2019	46,9	29,3%	32,9%	50.0%	45,8%
August 2020	9,2%	4,8%	4,1%	14,3%	9,9%
August 2019	49,2%	29,8%	32,9%	53.2%	48,0%
Sept 2020	17,6%	8,5%	26,2%	18,0%	15,9%
Sept 2019	32,1%	35,0%	55.0%	51,9%	54,2%
October 2020	19,8%	18,4%	16,3%	32,6%	22,7%
October 2019	52,9%	26,5%	33,5%	54,6%	50,6%

Source: Stats SA: Accommodation data cuts, 7th December 2020

SUMMARY

- Total income (current prices) from accommodation industry including income for restaurants, bar sales and other income went down by -66,5% while income from accommodation only declined by -66,6% in October 2020 compared to the same month in 2019.
- Although income from hotels (accommodation only) went down by -71,9% during October 2020 compared to October 2019, most income continues to come from this category.
- Hotels recorded the highest income from restaurants, bar sales and other income rather than income from accommodation only. Other categories recorded the highest income from accommodation as compared to income from restaurants, bar sales and other income.
- Even though income from accommodation recorded a decline of -66,6% during October 2020 compared to October 2019, this was an improvement since April 2020. Improvement was recorded from June 2020.
- Occupancy rate also started improving from June 2020 with the highest occupancy rate of 22,7% recorded in October 2020. This could be an indication of improvement when regulations were relaxed especially from June 2020.

2.2 FOOD AND BEVERAGE INDUSTRY

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

The results in table 11 indicates that the total income of the food and beverages industry in October 2020 was about R 3142,7 million, which was a decrease of -32,0% when compared to R 4623,8 million in October 2019. Most categories of food and beverages showed a decline in income with catering services having the highest decrease of -54,9% followed by restaurants and coffee shops with -51,3%. However, take-away and fast food outlets were the only category of food & beverage that recoded an increase of 9,5%.

Table 11: Total income by type of food and beverage industry: October 2020 compared to October 2019

Categories of Food and Beverages	Oct-20	Oct-19	% Change
Catering services (R million)	331,3	734,9	-54,9%
Take-away and fast food outlets (R million)	1 652,1	1 508,3	9,5%
Restaurants and coffee shops (R million)	1 159,3	2 380,6	-51,3%
Total Industry (R million)	3 142,7	4 623,8	-32,0%

Source: Stats SA: Food and beverages data cuts, 7th December 2020

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: OCTOBER 2020 COMPARED TO OCTOBER 2019

Table 12 gives the total passenger arrivals at Airports Company South Africa (ACSA) airports during October 2020 compared to October 2019. Total passenger arrivals decreased by -72,5%, from 1 874 521 in October 2019 to 515 223 in October 2020. The number of domestic passengers recorded in October 2020 were 466 213, which was a decrease of -64,0%, compared to 1 295 499 passengers in October 2019.

Table 12: Arriving Passengers: October 2020 compared to October 2019

Arriving Passengers	OCTOBER 2020	OCTOBER 2019	% Change October 2020 compared to October 2019
International	44 137	526 361	-91,6%
Regional	1 170	47 523	-97,5%
Domestic	466 213	1 295 499	-64,0%
Unscheduled	3 703	5 138	-27,9%
Total	515 223	1 874 521	-72,5%

Source: ACSAs data cuts, October 2020

PASSENGER DEPARTURE MOVEMENT: OCTOBER 2020 COMPARED TO OCTOBER 2019

Table 13 shows the total passenger departing from Airports Company South Africa (ACSA) airports during October 2020 compared to October 2019. Total departing passengers decreased by -71,7%, from 1 831 000 in October 2019 to 518 019 in October 2020. There were only 1211 regional passengers departing from ACSA airports and 44 238 international passengers departed during October 2020.

Table 13: Departing Passengers: October 2020 compared to October 2019

Departing Passengers	OCTOBER 2020	OCTOBER 2019	% Change October 2020 compared to October 2019
International	44 238	485 891	-90,9%
Regional	1 211	46 484	-97,4%
Domestic	468 849	1 293 941	-63,8%
Unscheduled	3 721	4 684	-20,6%
Total	518 019	1 831 000	-71,7%

Source: ACSAs data cuts October 2020

The table indicates that there was 518 019 domestic passengers departed in October 2020, which was a decline of -71,7% compared to 1 831 000 domestic travellers in October 2019. The number of passengers on unscheduled flights in October 2020 decreased by -20,6%; decreasing from 4 684 in October 2019 to 3 721 in October 2020.

REFERENCES

1. Airports Company South Africa. October 2020 Data cuts.
2. Statistics South Africa. October. 2020. Accommodation data cuts
3. Statistics South Africa. October. Food and Beverages data cuts.
4. Statistics South Africa. October 2020. Monthly Tourism and Migration report.