

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR SEPTEMBER 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 April 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. 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.

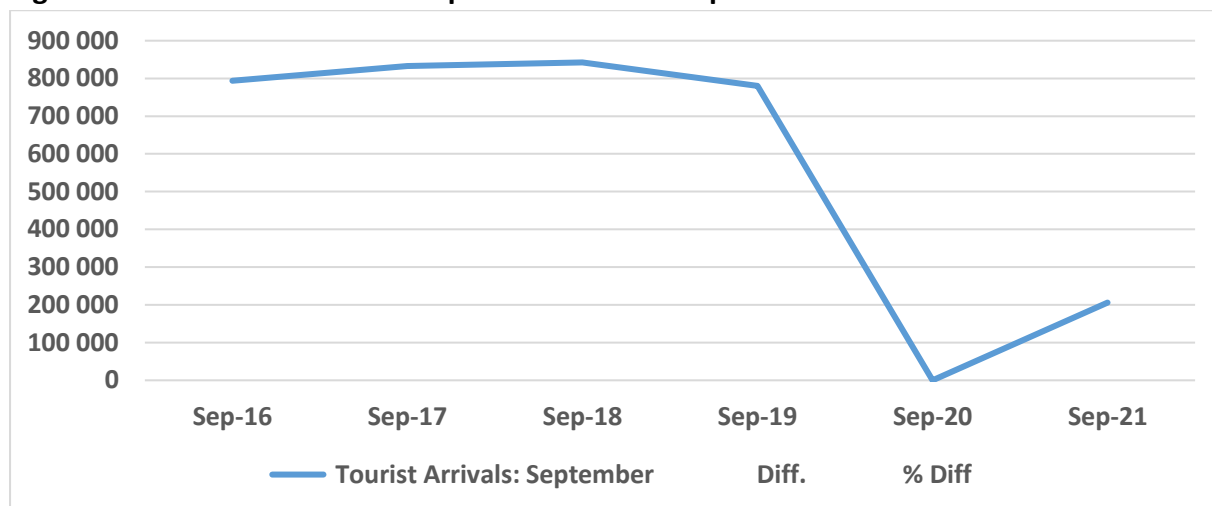
During September 2021, South Africa was under adjusted alert level 3 and 2, which allowed for international tourists to travel to the country subject to restrictions. These restrictions stipulated that all travellers visiting the country will be expected to abide by the regulations that include mandatory 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 September 2021 period, and this report provides a further analysis of the tourists that travelled to South Africa during this period.

TREND ANALYSIS: SEPTEMBER 2016 – SEPTEMBER 2021

A total of 205 948 tourist arrivals was recorded in September 2021. There were zero tourists recorded during September 2020 since the country was under lockdown level 4 restrictions, which prevented tourists from entering the country.

Figure 1 below indicates tourist arrivals for the period September 2016 to September 2021. Tourist arrivals increased from 793 610 in 2016 to 833 078 in 2017, which was a positive growth of 5,0% (39 468). Tourist arrivals increased slightly in 2018, from 833 078 in 2017 to 842 361 in 2018, which was an increase of 1,1% (9 283). However, tourist arrivals declined by -7,4% (-61 980) in September 2019 compared to the same month in 2018.

Figure 1: Total Tourist Arrivals September 2016 to September 2021



| | Sep-16 | Sep-17 | Sep-18 | Sep-19 | Sep-20 | Sep-21 |
|-------------------------|---------|---------|---------|----------|-----------|---------|
| Tourist Arrivals | 793 610 | 833 078 | 842 361 | 780 381 | 0 | 205 948 |
| Diff. | 76 860 | 39 468 | 9 283 | (61 980) | (780 381) | - |
| % Diff | 10,7% | 5,0% | 1,1% | -7,4% | -100,0% | *1/ |

*1/ Changes from zero in the preceding period cannot be calculated as a percentage

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

SEPTEMBER 2021 TOURIST ARRIVALS BY REGION

A comparison between September 2020 and September 2021 movement of people have not been included in the table below as the country was under lockdown level 4 restrictions in September 2020, and only essential services' providers were allowed to travel. Table 1 below shows there was a total of 205 948 tourists recorded for September 2021, and out of this total only 34 895 tourists were from the overseas regions. Africa region recorded a total of 170 630 tourists for September 2021 and this region remained the main source of tourist arrivals to South Africa, accounting for 82,9% of the total international arrivals during this month.

Table 1: Total Tourist Arrivals by Region: September 2021

| Region | September 2021 | % Share |
|-------------------------|----------------|---------------|
| EUROPE | 17 077 | 8,3% |
| NORTH AMERICA | 10 190 | 4,9% |
| CENTRAL & SOUTH AMERICA | 1 049 | 0,5% |
| AUSTRALASIA | 391 | 0,2% |
| MIDDLE EAST | 1 613 | 0,8% |
| ASIA | 4 575 | 2,2% |
| TOTAL OVERSEAS | 34 895 | 16,9% |
| AFRICA | 170 630 | 82,9% |
| Unspecified | 423 | 0,2% |
| GRAND TOTAL | 205 948 | 100,0% |

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

JANUARY-SEPTEMBER 2021 COMPARED TO JANUARY-SEPTEMBER 2020

Tourist arrival figures by region for January-September 2021 period compared to the same period in 2020 are indicated in table 2 below. It is important to note that for the month of September 2020 there were no tourists recorded due to COVID-19 lockdown level 4 regulations which prevented tourists from entering South Africa.

Total tourist arrivals went down by -39,5% (-960 066) during January-September 2021 period when compared to the same period last year, when 2 429 177 total arrivals were recorded. This means only 1 469 111 tourist arrivals were recorded during January-September 2021 period. Total tourist arrivals from the overseas markets decreased by -67,9% (-407 694), and this decline by driven by Australasia (-89,5%) with the highest negative growth, followed by Central and South America (-80,7%), Europe (-77,2%), Asia (-41,4%), North America (-32,7%) and Middle East (-26,2%).

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

| Region | Jan-Sept 2021 | Jan-Sept 2020 <i>(Month of April to September: 0 tourists recorded)</i> | Diff | % Diff |
|-------------------------|---------------|--|----------|--------|
| EUROPE | 92 406 | 404 912 | -312 506 | -77,2% |
| NORTH AMERICA | 55 267 | 82 173 | -26 906 | -32,7% |
| CENTRAL & SOUTH AMERICA | 5 670 | 29 361 | -23 691 | -80,7% |
| AUSTRALASIA | 2 464 | 23 520 | -21 056 | -89,5% |
| MIDDLE EAST | 8 017 | 10 859 | -2 842 | -26,2% |
| ASIA | 29 310 | 50 003 | -20 693 | -41,4% |
| TOTAL OVERSEAS | 193 134 | 600 828 | -407 694 | -67,9% |
| TOTAL AFRICA | 1 273 256 | 1 825 354 | -552 098 | -30,2% |
| Unspecified | 2 721 | 2 995 | -274 | -9,1% |
| GRAND TOTAL | 1 469 111 | 2 429 177 | -960 066 | -39,5% |

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

Table 3 below gives the rankings of the top ten African source markets for the period January-September 2021 compared to January-September 2020. Most of the top ten African source markets moved their positions except for Eswatini and Botswana, which ranked 4th and 5th position respectively during both periods in 2020 and 2021. Mozambique, Namibia, Zambia, Tanzania and DRC all moved up their positions in 2021. Mozambique moved from 3rd position in January-September 2020 to 1st position in January-September 2021, while the DRC replaced Angola in the top ten, by taking the 10th position in 2021 period. Tanzania moved from 10th to 9th position, Zimbabwe lost its 1st position to 2nd position and Lesotho dropped from 2nd to 3rd position for the period under review. Half of the top ten countries recorded a decline with Zimbabwe recording the highest negative growth of -51,6%, followed by Botswana (-44,9%),

and Lesotho (-41,1%). Namibia recorded the highest growth of 72,4% followed by Zambia (48,0%) and DRC (28,3%).

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

| Country | Rank: Jan-Sept 2021 | Tourist Arrivals Jan-Sept 2021 | Rank: Jan-Sept 2020 <i>(Month of April to September: 0 tourists recorded)</i> | Tourist Arrivals Jan-Sept 2020 | % Change from Jan-Sept 2020 to Jan-Sept 2021 |
|------------|---------------------|--------------------------------|--|--------------------------------|--|
| Mozambique | 1 | 363 659 | 3 | 345 026 | 5,4% |
| Zimbabwe | 2 | 281 909 | 1 | 582 694 | -51,6% |
| Lesotho | 3 | 243 530 | 2 | 413 724 | -41,1% |
| Eswatini | 4 | 119 157 | 4 | 188 948 | -36,9% |
| Botswana | 5 | 64 495 | 5 | 117 099 | -44,9% |
| Namibia | 6 | 62 240 | 7 | 36 098 | 72,4% |
| Zambia | 7 | 46 850 | 8 | 31 659 | 48,0% |
| Malawi | 8 | 36 586 | 6 | 43 325 | -15,6% |
| Tanzania | 9 | 8 777 | 10 | 8 459 | 3,8% |
| DRC | 10 | 8 148 | 12 | 6 352 | 28,3% |

Source: Stats SA and tourist arrivals data cuts September 2021

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-September 2021 with January-September 2020, most of the top 10 overseas markets recorded a decline in tourist arrivals; with positive growth only seen from the Russian Federation (16.8%) and Pakistan (32%). All overseas source markets moved their positions, either by improving or dropping their positions in the top ten list. USA replaced UK as the main overseas source market despite experiencing a decline of -21,8%. In the January-September 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-September 2021 vs. January-September 2020

| Country | Rank: Jan-Sept 2021 | Tourist Arrivals Jan-Sept 2021 | Rank: Jan-Sept 2020 <i>(Month of April to September: 0 tourists recorded)</i> | Tourist Arrivals Jan-Sept 2020 | % Change from Jan-Sept 2020 to Jan-Sept 2021 |
|-----------------|---------------------|--------------------------------|--|--------------------------------|--|
| USA | 1 | 51 630 | 3 | 66 016 | -21,8% |
| UK | 2 | 16 093 | 1 | 119 899 | -86,6% |
| Germany | 3 | 15 900 | 2 | 98 333 | -83,8% |
| India | 4 | 11 259 | 8 | 17 113 | -34,2% |
| France | 5 | 9 915 | 4 | 37 470 | -73,5% |
| The Netherlands | 6 | 8 320 | 5 | 32 030 | -74,0% |

| Country | Rank: Jan-Sept 2021 | Tourist Arrivals Jan-Sept 2021 | Rank: Jan-Sept 2020 <i>(Month of April to September: 0 tourists recorded)</i> | Tourist Arrivals Jan-Sept 2020 | % Change from Jan-Sept 2020 to Jan-Sept 2021 |
|--------------------|---------------------|--------------------------------|--|--------------------------------|--|
| Russian Federation | 7 | 6 299 | 20 | 5392 | 16,8% |
| China | 8 | 4 930 | 12 | 11516 | -57,2% |
| Pakistan | 9 | 4 431 | 29 | 3358 | 32,0% |
| Switzerland | 10 | 4 142 | 10 | 13 573 | -69,5% |

Source: Stats SA and tourist arrivals data cuts, September 2021

References:

1. Statistics South Africa November 30th 2021, September Tourism and Migration report.