

SUMMARY ANALYSIS OF SOUTH AFRICA'S TOURIST ARRIVALS FOR NOVEMBER 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.

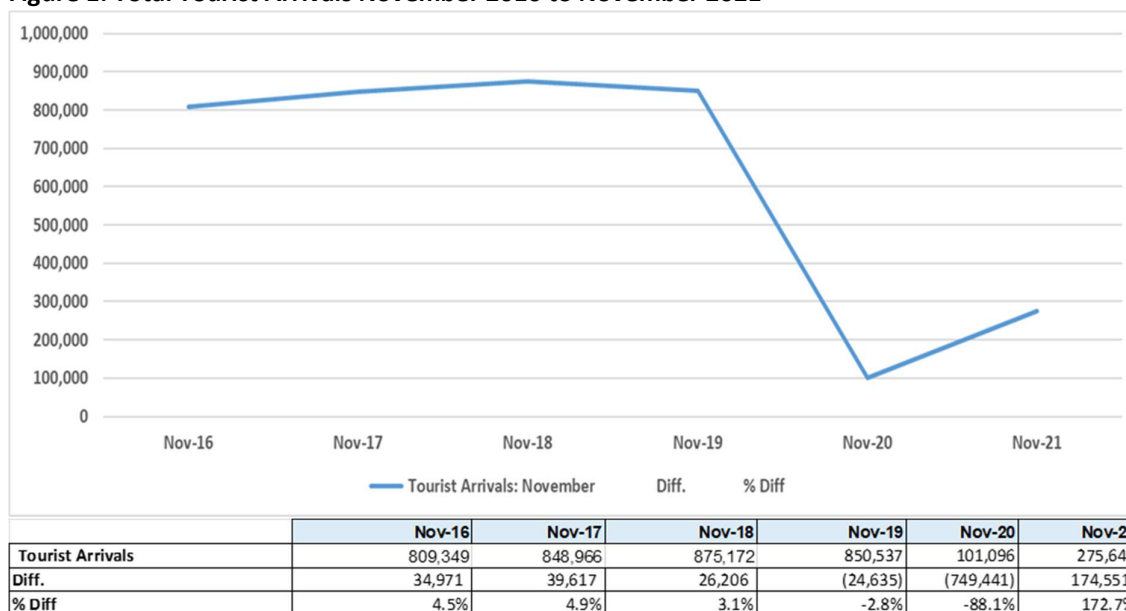
During November 2021, South Africa was under adjusted alert level 1, which allowed for international tourists to travel to the country subject to restrictions. These restrictions stipulated that all travellers visiting the country will be expected to abide by the regulations that include mandatory wearing 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 November 2021, and this report provides a further analysis of the tourists that travelled to South Africa during last November. The performance of tourism related industries namely; accommodation, food and beverages, and aviation for November 2021 compared to November 2020 is also provided in this report.

TREND ANALYSIS: NOVEMBER 2016 – NOVEMBER 2021

A total of 275 647 tourist arrivals was recorded in November 2021, which was an increase of 172.7% (174 551) compared to the same month in 2020.

Figure 1 below indicates tourist arrivals for the period November 2016 to November 2021. Tourist arrivals increased from 809 349 in 2016 to 848 966 in 2017, which was an increase of 4.9% (39 617). Tourist arrivals further increased in 2018, from 848 966 in 2017 to 875 172 in 2018, which was an increase of 3,1% (26 206). Tourist arrivals decreased by -2.8% (-24,635) in November 2019 compared to the same month in 2018, and further decreased in 2020 by -88,1%; from 850 537 tourist arrivals in November 2019 to 101 096 in November 2020.

Figure 1: Total Tourist Arrivals November 2016 to November 2021



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

NOVEMBER 2021 TOURIST ARRIVALS BY REGION

Table 1 below indicates tourist arrivals by region for November 2021 compared to the same month in 2020. All regions experienced an increase in tourist arrivals during this month compared to the same month of the previous year. North America recorded the highest increase of 574,7% (10 407) followed by Central and South America (454,4%; 1 345) and Europe (408,3%; 40 855). Africa also recorded an increase of 135,9% (115 980) and this region remained the main source of tourist arrivals to the country, accounting for 73,0% (201 307) of total tourist arrivals during November 2021.

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

Region	NOVEMBER 2021	NOVEMBER 2020	Diff	% Diff.
EUROPE	50 860	10 005	40 855	408.3%
NORTH AMERICA	12 218	1 811	10 407	574.7%
CENTRAL & SOUTH AMERICA	1 641	296	1 345	454.4%
AUSTRALASIA	1 058	318	740	232.7%
MIDDLE EAST	2 423	539	1 884	349.5%
ASIA	5 479	2 551	2 928	114.8%
TOTAL OVERSEAS	73 679	15 520	58 159	374.7%
AFRICA	201 307	85 327	115 980	135.9%
Unspecified	661	249	412	165.5%
GRAND TOTAL	275 647	101 096	174 551	172.7%

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

JANUARY-NOVEMBER 2021 COMPARED TO JANUARY-NOVEMBER 2020

Tourist arrivals figures by region for January-November 2021 period compared to January-November 2020 period are indicated in table 2 below. Total tourist arrivals went down by -23,5% during January-November 2021 compared to January- November 2020 period, and this was a decline from a total of 2 604 261 tourist arrivals to 1 992 591 (-611 670). Total tourist arrivals from the overseas market decreased by -47,8% (-298 385). Australasia (-83,0%) recorded the highest negative growth followed by Central and South America (-70,0%), Europe (-56,5%), Asia (-26,1%), and North America (-7,6%). Middle East was the only region that recorded a positive growth of 4,4% during the period under review.

In Australasia, Australia had the highest decline in volume of -16 874 (-83,4%) followed by New Zealand (-3 053; -80,9%); in Central and South America, Brazil recorded the highest decline in volume (-14 223; -74,6%); and the United Kingdom had the highest decline in volume (-89 685; -72,4%) in the Europe region. Tourist arrivals from Africa region decreased by -15,9% (-313 766) during the same period under review, and this decline in volume was driven by Zimbabwe (-260 799; -41,8%), followed by Lesotho (-117 676; -27,4%) and Eswatini (-44 563; -22,1%), refer to table 3 below.

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

Region	Jan- November 2021	Jan- November 2020 <i>(Month of April to September: 0 tourists recorded)</i>	Diff	% Diff
EUROPE	182 410	419 773	-237 363	-56.5%
NORTH AMERICA	78 351	84 839	-6 488	-7.6%
CENTRAL & SOUTH AMERICA	8 944	29 777	-20 833	-70.0%
AUSTRALASIA	4 098	24 050	-19 952	-83.0%
MIDDLE EAST	12 166	11 651	515	4.4%
ASIA	40 319	54 583	-14 264	-26.1%
TOTAL OVERSEAS	326 288	624 673	-298 385	-47.8%
TOTAL AFRICA	1 662 400	1 976 166	-313 766	-15.9%
Unspecified	3 903	3 422	481	14.1%
GRAND TOTAL	1 992 591	2 604 261	-611 670	-23.5%

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

Table 3 below gives the rankings of the top ten African source markets for the period January-November 2021 compared to January-November 2020 period. Most of the top ten African source markets moved their positions except for Eswatini and Botswana which ranked in 4th and 5th positions respectively during both periods. Mozambique, Namibia, Zambia, Tanzania and DRC all moved up their positions in 2021. Mozambique was 3rd position during January-November 2020 and moved to 1st position during the same period in 2021, whilst the DRC improved its 12th position during January-November 2020 by occupying the 10th position in January-November 2021, replacing Angola in the top ten African country rankings. Tanzania moved from 10th position to 9th position. Zimbabwe lost its 1st position and took the 2nd position; and Lesotho dropped from 2nd position to 3rd position for the period under review. More than half of the top ten countries recorded an increase, with Namibia recording

the highest positive growth of 72.2%, followed by Zambia (51,1%), DRC (43,1%), Mozambique (21,4%), Tanzania (20,6%) and Malawi (3,2%).

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

Country	Rank: Jan-Nov 2021	Tourist Arrivals Jan-Nov 2021	Rank: Jan-Nov 2020 <i>(Month of April to September: 0 tourists recorded)</i>	Tourist Arrivals Jan-Nov 2020	% Change from Jan-Nov 2020 to Jan-Nov 2021
Mozambique	1	469 441	3	386 681	21.4%
Zimbabwe	2	363 796	1	624 595	-41.8%
Lesotho	3	312 477	2	430 153	-27.4%
Eswatini	4	157 124	4	201 687	-22.1%
Botswana	5	89 376	5	121 974	-26.7%
Namibia	6	80 485	7	46 742	72.2%
Zambia	7	61 601	8	40 778	51.1%
Malawi	8	49 908	6	48 379	3.2%
Tanzania	9	11 853	10	9 830	20.6%
DRC	10	10 898	12	7 613	43.1%

Source: Stats SA and tourist arrivals data cuts November 2021

Table 4 shows the rankings of the top ten overseas source markets. Comparing January-November 2021 with January-November 2020, all of the top 10 overseas markets recorded a decrease in tourist arrivals except for Russia Federation and the USA, which increased by 67.6% and 5,5% respectively. Majority of overseas source markets moved their positions except for Germany and France, which ranked in 2nd and 4th positions respectively during the period under review. USA replaced UK as the main overseas source market. In the January-November 2021 top ten list, Brazil and Australia were replaced by Russian Federation and Belgium.

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

Country	Rank: Jan-Nov 2021	Tourist Arrivals Jan-Nov 2021	Rank: Jan-Nov 2020 (Month of April to September: 0 tourists recorded)	Tourist Arrivals Jan-Nov 2020	% Change from Jan-Nov 2020 to Jan-Nov 2021
USA	1	71 863	3	68 088	5.5%
Germany	2	38 580	2	101 183	-61.9%
UK	3	34 132	1	123 817	-72.4%
France	4	18 340	4	38 580	-52.5%
The Netherlands	5	16 785	5	32 995	-49.1%
India	6	16 162	8	17 953	-10.0%
Russian Federation	7	9 614	20	5 736	67.6%
Switzerland	8	9 400	10	14 398	-34.7%
Belgium	9	7 684	13	11 465	-33.0%
Canada	10	6 488	9	16 751	-61.3%

Source: Stats SA and tourist arrivals data cuts November 2021

PERFORMANCE OF SOUTH AFRICA'S TOURISM RELATED INDUSTRIES: NOVEMBER 2021 COMPARED TO NOVEMBER 2020

The next section of the report gives the performance of tourism related industries during November 2021 compared to November 2020.

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 June 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. For the month of November 2021, South Africa was under adjusted level 1, which started on 01 October 2021. During November 2020, South Africa was also under lockdown level 1. The table below provides a summary of the lockdown regulations of the different levels for the accommodation, food and beverages and aviation 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 5: South Africa COVID-19 level 1 regulations for the accommodation, food and beverages and aviation industries

Level 1 1-30 November 2020	Level 1 1 - 30 November 2021
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 all allowed to operate but subject to the strict adherence to all health protocols. Sale of alcohol permitted.	
Aviation	
Level 1	
Domestic and International air travel allowed. International travel allowed.	

Source: www.gov.za/coronavirus

2.1 ACCOMMODATION INDUSTRY: NOVEMBER 2021

ACCOMMODATION INDUSTRY INCOME: NOVEMBER 2021 COMPARED TO NOVEMBER 2020

Table 6 below provides the total income from the accommodation industry, which comprises of income from restaurants, bar sales, income from accommodation only and other income, mainly when comparing November 2021 to November 2020. Other income includes income from casino gambling, laundry and telephone services, rentals and fees received for transport services, offices, shops, garages, etc. During November 2021, the total income (current prices) from the accommodation industry recorded an increase of 83,6% compared to November 2020. Total income from all categories recorded an increase except for caravan parks and camping sites, which experienced a decrease of -4,9% during November 2021. Hotels recorded the highest positive growth of 95,4%, their income increased from R1,114.7 million in November 2020 to R2,177.9 million in November 2021.

Table 6: Income from accommodation (current prices: November 2021 compared to November 2020)

Type of Accommodation	November 2021				November 2020				% Change Total Income
	Restaurants, bar sales	Accommodation only	Other income	Total income	Restaurants, bar sales	Accommodation only	Other Income	Total income	November 2021 compared to November 2020
Hotels (R million)	R351.1	R727.3	R1,099.5	R2,177.9	R226.4	R419.3	R469.0	R1,114.7	95.4%
Caravan parks and camping sites (R million)	R0.6	R14.7	R0.1	R15.4	R0.3	R15.9	R0.0	R16.2	-4.9%
Guest houses and guest farms (R million)	R5.2	R70.4	R2.3	R77.9	R4.7	R45.8	R1.6	R52.1	49.5%
Other accommodation (lodges, bed-and-breakfast, self-catering, and 'other' establishments not classified) (R million)	R82.2	R485.2	R60.4	R627.8	R49.2	R327.5	R19.3	R396.0	58.5%
Total Industry - (R million)	R439.1	R1,297.6	R1,162.3	R2,899.0	R280.6	R808.5	R489.9	R1,579.0	83.6%

Source: Stats SA: November Accommodation data cuts and report, 24 January 2022

Table 7 below indicates that income from accommodation (excluding restaurants, bar sales and other income) went up by 60,5% during November 2021 compared to the same month in 2020. Most categories of accommodation recorded an increase in income levels except for caravan parks and camping sites, which saw a -7,5% decrease in income. Hotels had the highest increase of 73,5%; followed by guest houses and guest farms (53,7%) and other accommodation (48,2%).

Table 7: Income from Accommodation (excluding restaurants, bar sales and other income): November 2021 compared to November 2020

Type of Accommodation	November 2021 Accommodation only	November 2020 Accommodation only	% Change November 2021 compared to November 2020
Hotels (R million)	R727.3	R419.3	73.5%
Caravan parks and camping sites (R million)	R14.7	R15.9	-7.5%
Guest houses and guest farms (R million)	R70.4	R45.8	53.7%
Other accommodation (R million)	R485.2	R327.5	48.2%
Total Industry – (R million)	R1,297.6	R808.5	60.5%

Source: Stats SA: November Accommodation data cuts and report, 24 January 2022

The monthly percentage change of income from accommodation industry (excluding restaurants, bar sales and other income) for January to November 2021 compared to January to November 2020 is provided in table 8 below. Income from accommodation recorded an increase of 60,5% during November 2021 compared to the same month in 2020. For April to November 2021 period, the results show an increase in income compared to the same months of 2020.

Table 8: Year on Year Change in income from Accommodation January-November 2021 compared to January-November 2020

MONTH	2020	2021
January	5,3%	-70,9%
February	9,4%	-75,1%
March	-41,1%	-40,6%
April	-98,0%	2291,1%
May	-97,5%	1724,6%
June	-94,5%	653,5%
July	-92,0%	241,5%
August	-83,2%	125,4%
September	-74,4%	74,2%
October	-68,7%	51,9%
November	-68,6%	60,5%

Source: Stats SA: November Accommodation Report, 24 January 2022

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JANUARY -NOVEMBER 2021 COMPARED TO JANUARY - NOVEMBER 2020

Table 9 below provides occupancy rates by accommodation type for the months of January-November 2021 compared same months in 2020. The total accommodation occupancy rate recorded in November 2021 was 29,3%; which was an increase compared to 21,8% seen in November 2020. The occupancy rate of all accommodation establishments increased in November 2021 compared to November 2020.

Table 9: Occupancy Rate by Month: January-November 2021 vs. January-November 2020

Month	Hotel	Caravan Parks and Camping Sites	Guest-Houses and Guest Farms	Other Accommodation	Total Accommodation
Jan-20	46%	30,7%	35,8%	44,6%	43,3%
Jan-21	14,3%	24,8%	12,8%	25,2%	18,2%
Feb-20	53,9%	29,9%	34,7%	45,7%	47,6%
Feb-21	16,3%	25,6%	13,3%	25%	19,4%
Mar-20	30,4%	29,5%	23%	31,3%	29,9%
Mar-21	21,6%	29,1%	13,8%	28,4%	23,5%
Apr-20	1,6%	0,4%	0,8%	0,9%	1,2%
Apr-21	24,6%	31,1%	15,4%	32,4%	26,6%
May-20	1,5%	0,3%	0,3%	1,4%	1,3%
May-21	22,5%	35,9%	14,5%	25,9%	23,8%
Jun-20	3,9%	0,3%	1,2%	3,4%	3,2%
Jun-21	19,4%	35,8%	14,6%	24,5%	21,8%
Jul-20	5,8%	0,6%	3,3%	5,1%	4,9%
Jul-21	12,4%	33,7%	8,2%	19,3%	15,9%
Aug-20	9%	6,4%	3,4%	12,3%	9,2%
Aug-21	20%	30,6%	13,4%	24,5%	21,9%
Sept-20	15,2%	21,1%	7,2%	21,5%	16,8%
Sept-21	26,4%	33,3%	19,1%	28,8%	27,0%
Oct-20	18,8%	30,6%	13,8%	27,3%	21,8%
Oct-21	31,6%	31,5%	19,3%	30,4%	30,0%
Nov-20	21.2%	18.4%	15.6%	25.7%	21.8%
Nov-21	33.2%	22.1%	19.7%	27.6%	29.3%

Source: Stats SA: November Accommodation data cuts, 24 January 2022

In addition to Stats SA's accommodation report, the Department also subscribes to STR Global, which collects information from hotels on a monthly basis. The performance of the South African hotel industry for November 2021 compared to November 2020 is provided in table 10 below. It is important to note that the STR hotel data for November 2021 and November 2020 is from a sample of 230 hotels that is drawn from a census/population of 420 hotels. An increase was seen in all hotel performance indicators in November 2021 when compared to November 2020, with the hotel occupancy rate increasing by 57,0% in November 2021 compared to the same month in 2020. The occupancy rate improved from 33,7% in November 2020 to 52,9% in November 2021. The Average Daily Rate (ADR) for November 2021 was R1 162,0; which was an increase of 15,1% compared to R1 009,5 seen in November 2020. The Revenue Per Available Room also increased by 80,8%; from R339,8 in November 2020 to R614,2 in November 2021.

Table 10: South Africa Hotel Performance: November 2021 compared to November 2020

Month	Occupancy rate	% Change	Average Daily Rate (Rand)	% Change	Revenue per available room (Rand)	% Change	Census	Sample
21-Nov	52.9	57.0%	1,162.0	15.1%	R614.2	80.8%	420	230
20-Nov	33.7		1,009.5		R339.8			

Source: STR Hotel Data November 2021

2.2 FOOD AND BEVERAGES INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: NOVEMBER 2021 COMPARED TO NOVEMBER 2020

The results in table 11 indicates that the total income for the food and beverages industry for November 2021 was about R5 443,2 million, which was an increase of 21,6% compared to R4 476,8 million in November 2020. All of the food and beverages industries showed an increase in income during the period under review.

Table 11: Total income at current prices by type of enterprise (R million): November 2021 compared to November 2020

Categories of Food and Beverages	November 21	November 20	% Change
Catering services (R million)	R868,2	R714,7	21,5%
Take-away and fast food outlets (R million)	R1 935,3	R1 418,3	36,5%
Restaurants and coffee shops (R million)	R2 639,7	R2 343,8	12,6%
Total Industry (R million)	R5 443,2	R4 476,8	21,6%

Source: Stats SA: November food and beverages data cuts and reports, 24 January 2022

The monthly percentage change of income from the food and beverages industry for January-November 2021 compared to January-November 2020 is provided in table 12 below. Income from food and beverages industry recorded an increase of 21,6% during November 2021 compared to the same month in 2020. Figures show that there was also an increase recorded during April-November 2021 period compared to April-November 2020 period.

Table 12: Year on Year Change in income from food and beverages industry: January-November 2021 compared to January-November 2020

MONTH	2020	2021
January	5,2%	-46,5%
February	4,0%	-35,1%
March	-30,3%	-4,0%
April	-94,5%	1 321,9%
May	-87,4%	545,7%
June	-65,8%	106,9%
July	-57,2%	43,1%
August	-52,3%	51,3%
September	-42,4%	32,5%
October	-36,3%	36,3%
November	-35,2%	21,6%

Source: Stats SA: November Food and beverages data cuts and report, 24 January 2022

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: NOVEMBER 2021 COMPARED TO NOVEMBER 2020

Table 13 gives the total passenger arrivals at Airports Company South Africa (ACSA) airports during November 2021 compared to November 2020. Total passenger arrivals grew by 65,6%; from 616 703 in November 2020 to 1 021 537 in November 2021. All types of arriving passengers recorded an increase during November 2021 compared to November 2020.

Table 13: Arriving Passengers: November 2021 compared to November 2020

Arriving Passengers	November 21	November 20	% Change
International	193,527	66,777	189.8%
Regional	20,711	5,671	265.2%
Domestic	801,129	540,172	48.3%
Unscheduled	6,170	4,083	51.1%
Total	1,021,537	616,703	65.6%

Source: ACSAs data cuts, November 2021

PASSENGER DEPARTURE MOVEMENT: NOVEMBER 2021 COMPARED TO NOVEMBER 2020

Table 14 shows the total passenger departing from Airports Company South Africa (ACSA) airports during November 2021 compared to November 2020. Total departing passengers increased by 66,6%; from 606 664 in November 2020 to 1 010 830 in November 2021. All types of departing passengers recorded an increase during November 2021 compared to November 2020.

Table 14: Departing Passengers: November 2021 compared to November 2020

Departing Passengers	November 21	November 20	% Change
International	180,889	58,733	208.0%
Regional	20,622	5,774	257.2%
Domestic	803,441	538,966	49.1%
Unscheduled	5,878	3,191	84.2%
Total	1,010,830	606,664	66.6%

Source: ACSAs data cuts, November 2021

References:

1. Statistics South Africa January 26th 2022, November Tourism and Migration report.
2. Statistics South Africa, January 24th 2022, November Accommodation data cuts.
3. Statistics South Africa, January 24th 2022, November Food and Beverage data cuts.
4. Airports Company South Africa, November 2021. Data cuts.
5. STR Global RSA Hotel review data November 2021