



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

TOURISM QUARTERLY PERFORMANCE REPORT: 1st EDITION: JAN-MARCH 2020



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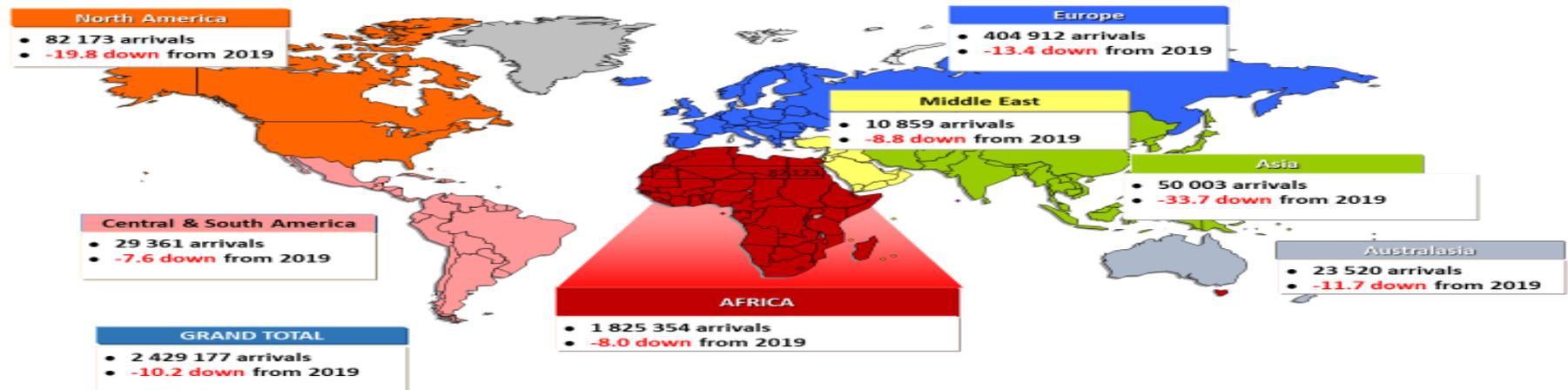
INTRODUCTION

In this report an analysis of tourist arrivals and tourism related industries for the period Jan-March 2020 compared to Jan-March 2019 will be provided at a national and global level. Total employment for tourism related industries is also provided in the report for the quarter (Jan-March 2020) as direct contribution of tourism could not be estimated due to change in trends during 2020. During this period (Jan-March 2020) the Coronavirus (Covid-19) started to spread rapidly from China to other parts of the world. On 11 March 2020, the World Health Organisation (WHO), had declared the COVID-19 outbreak as 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. Furthermore, the lockdown measures led to closures of most tourism related industries. The report will therefore also include some of the impact that the COVID-19 as well as lockdown regulations had on the tourism sector for the period Jan-March 2020 using secondary data sources.

SECTION 1: SOUTH AFRICA TOURIST ARRIVALS PERFORMANCE: 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 figure 1 below. 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%.

Figure 1: Total Tourist Arrivals by Region Jan-March 2020 vs. Jan-March 2019



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

SOUTH AFRICA TOURIST ARRIVALS PERFORMANCE: JANUARY-MARCH 2020 COMPARED TO JANUARY-MARCH 2019 CONTINUED

Further analysis indicate that 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 countries 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%).

The decline in South Africa's tourist arrivals from all regions could be related to the Covid-19 pandemic. 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 effect of the COVID-19 pandemic can also be seen in South Africa's top 10 overseas and Africa markets tourist arrivals which are presented below.

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

REGION	Jan-Mar2019	Jan-Mar2020	Diff	% Diff
EUROPE	467 791	404 912	-62 879	-13,4%
NORTH AMERICA	102 409	82 173	-20 236	-19,8%
CENTRAL & SOUTH AMERICA	31 786	29 361	-2 425	-7,6%
AUSTRALASIA	26 634	23 520	-3 114	-11,7%
MIDDLE EAST	11 908	10 859	-1 049	-8,8%
ASIA	75 385	50 003	-25 382	-33,7%
TOTAL OVERSEAS	715 913	600 828	-115 085	-16,1%
TOTAL AFRICA	1 984 554	1 825 354	-159 200	-8,0%
Unspecified	3 600	2 995	-605	-16,8%
GRAND TOTAL	2 704 067	2 429 177	-274 890	-10,2%

Source: Stats SA: Tourism and Migration report: March 2020

Table 2 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 2: South Africa's Top 10 African Source Markets: Jan-March 2020 vs. Jan-March 2019

COUNTRY	RANK: Jan-Mar2020	Tourist Arrivals Jan-Mar2020	RANK: Jan-Mar2019	Tourist Arrivals Jan-Mar2019	% Change from Jan-Mar2019 to Jan-Mar2020
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 3 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 3: South Africa's Top 10 Overseas Source Markets: Jan-Mar2020 vs. Jan-Mar2019

COUNTRY	RANK: Jan-Mar2020	Tourist Arrivals Jan-Mar2020	RANK: Jan-Mar2019	Tourist Arrivals Jan-Mar2019	% Change from Jan-Mar2019 to Jan-Mar2020
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

SECTION 2: PERFORMANCE OF SOUTH AFRICA'S TOURISM RELATED INDUSTRIES (JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019)

2.1 ACCOMMODATION:

ACCOMMODATION INDUSTRY INCOME: JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019

The total income from the accommodation industry recorded a decline of -10,4% moving from an amount R6 435,7million in Jan-March 2019 to R 5 767,3 million in Jan-March 2020 as indicated in table 4 below. Compared to the previous quarter, all categories of accommodation had a decline in income except for Caravan parks and camping sites which had an increase of 3, 1%. Guest houses and guest farms had the highest decline (-35.1%) followed by hotels (-11,8%) and other accommodation (-2,1%). Other category includes lodges, bed-and-breakfast establishments, self-catering establishments and 'other' establishments not classified. Further analysis was done to indicate which months influenced the total decline in income received during the period Jan-March 2020 compared to Jan-March 2019 which can be seen in table 5.

Table 4: Income from accommodation: Jan-March 2020 compared to Jan-March 2019

Type of Accommodation	Jan-March 2019	Jan-March 2020	% Change	% share
Hotels (R million)	R4 369,4	R3 853,1	-11,8%	66,8%
Caravan parks and camping sites (R million)	R55,6	R57,3	3,1%	1,0%
Guest houses and guest farms (R million)	R330,4	R211,8	-35,9%	3,7%
Other accommodation (R million)	R1 680,3	R1 645,1	-2,1%	28,5%
Total Industry	R6 435,7	R5 767,3	-10,4%	100%

Source: Stats SA: Accommodation data cuts, June 2020

Table 5 shows the growth in total income for the different accommodation types by month. Total industry income recorded an increase in Jan 2020 and Feb 2020 when compared to the same months in 2019. Guest houses and guest farms were the only accommodation type that had a decline in Jan 2020 (-34, 2%) and Feb 2020 (-26.0%) compared to Jan and Feb 2019. For March 2020, there was a decline of -41, 6% in total income compared to March 2019. All accommodation types also had experienced a decline in total income compared to March 2019. The results indicate that the decline in March 2020 had influenced the total income received during Jan-March 2020 compared to Jan-March 2019 in most accommodation types. The poor performance of the accommodation industry in March 2020 could be related to the start of the spread of COVID-19 globally which resulted in travellers either changing or cancelling their accommodation bookings.

Furthermore, lockdown in South Africa announcement and implementation as of 27 March 2020 might have led to the decline as well.

Table 5: Jan, Feb, March 2020 compared to Jan, Feb, March 2019 change in income (%)

Type of Accommodation	Jan 2020 vs Jan 2019	Feb 2020 vs Feb 2019	March 2020vs March 2019
Hotels	3,6%	5,5%	-42,9%
Caravan parks and camping sites	18,1%	25,4%	-24,6%
Guest houses and guest farms	-34,2%	-26,0%	-55,8%
Other accommodation	10,9%	22,4%	-36,4%
Total Industry	4,5%	8,1%	-41,6%

Source: Stats SA: Accommodation data cuts, June 2020

ACCOMMODATION INDUSTRY OCCUPANCY RATE: JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019

Total industry occupancy rates for Jan, Feb and March 2020 and for the same months in 2019 are provided in table 6 below. The results show that the occupancy rates for January and February 2020 were almost the same with occupancy rates recorded during the same months in 2019. However in March 2020, total occupancy dropped to 29,4% from 49,2% in March 2019.

Table 6: Occupancy rate for Jan, Feb, March 2020 compared to Jan. Feb and March 2019

Occupancy Rate	Jan-20	Jan-19	Feb-20	Feb-19	Mar-20	Mar-19
Total Industry	50,6	50,7	50,1	50,2	29,4	49,2

Source: Stats SA: Accommodation data cuts, June 2020

Table 7 indicates average occupancy rates for all accommodation types for the period Jan-March 2020 compared to Jan-Feb 2019. Using seasonally adjusted figures, total industry average occupancy rate for the period Jan-March 2020 was 41,5% which was a decrease compared to the same period in 2019 (47,8%). All accommodation types experienced a decrease in average occupancy rates for the period under review. As indicated above, the decline in March 2020 influenced the total average occupancy rate reported for the period Jan-March 2020.

Table 7: Average occupancy rate by accommodation type: Jan-March 2020 compared to Jan-March 2019 (Seasonally adjusted figures)

Seasonally Adjusted			
Average occupancy Rate:	Jan-March 2019	Jan-March 2020	Change
Hotels	50,0	43,4	↓
Caravan parks and camping sites	31,5	28,1	↓
Guest houses and guest farms	38,9	31,7	↓
Other accommodation	48,7	43,2	↓
Total Industry	47,8	41,5	↓

Source: Stats SA: Accommodation data cuts, June 2020

SOUTH AFRICA'S HOTEL PERFORMANCE, JAN-MAR 2020 COMPARED TO JAN-MAR 2019.

In addition to the Stats SA's accommodation report, the Department also subscribes to STR Global which collects information from a sample of hotels on a monthly basis. The analysis in this section will be based on the reports received from STR for the period Jan-March 2020 compared to Jan-March 2019.

Data reported for Jan-March 2020 compared to Jan-March 2019 was collected from 376 hotels from a population of 451 hotels in South Africa. It is estimated that the occupancy rate for South Africa's hotel industry declined from 62,6% during the first three months of 2019 to 53.6% during the same period in 2020, this was a decline of about -14.4%. The Average Daily Rate (ADR) increased by 3.0% moving from R1 370, 95 to R1 411, 86 during the period under review. Revenue per available room (RevPar) for Jan-Mar 2020 was R756.96 which was a decline of -11.8% compared to R858, 41 in Jan-March 2019. The decline in occupancy rate and RevPAR follows the same trend as Stats SA's accommodation results.

Table 8: Hotel performance Jan-March 2020 compared to Jan-March 2019

Occupancy rate (%)			Average Daily Rate (ADR) (Rand)			Revenue per available room (RevPAR) (Rand)		
2019 Jan-Mar	2020 Jan-Mar	% Change	US\$ 2019 Jan-Mar	2020 Jan-Mar	% change	2019 Jan-Mar	2020 Jan-Mar	% Change
62,6	53,6	-14,4%	1 370,95	1 411,86	3,0%	858,41	756,96	-11,8%

Source: STR Global Hotel Data March 2020

Month to Month analysis of the hotel industry shows that for Jan and Feb 2020 compared to Jan and Feb 2019, all indicators reported an increase in occupancy rate, ADR and RevPar. However, in March 2020 there was a decline of -45,0% in occupancy rate, -4,2 in ADR and -47,3 in RevPar compared to March 2019. These results show how the Jan-March 2020 results above have been influenced by March 2020 performance.

Table 9: Hotel performance for Jan, Feb and March 2020 compared to Jan, Feb and March 2019

	Jan 2020 compared to Jan 2019 (%)			Feb 2020 compared to Feb 2019 (%)			March 2020 compared to March 2019 (%)		
	Occ	ADR	RevPAR	Occ	ADR	RevPAR	Occ	ADR	RevPAR
South Africa+	6,6	5,4	12,4	1,8	4,2	6,1	-45,0	-4,2	-47,3

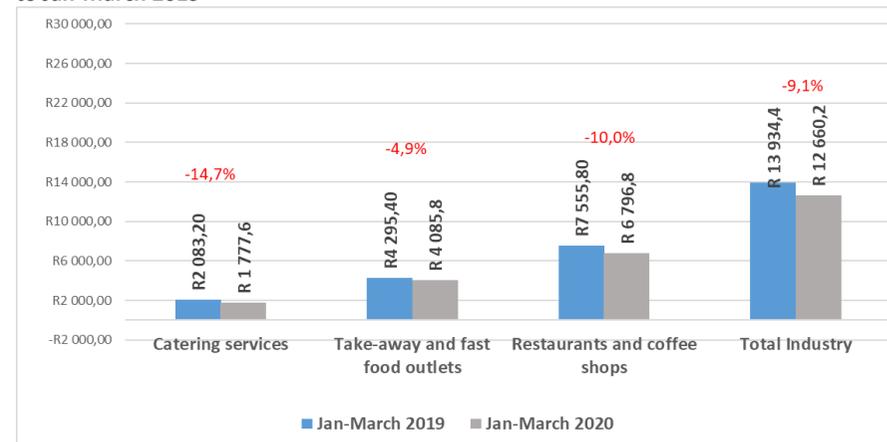
Source: STR Global Hotel Data March 2020

2.2 FOOD AND BEVERAGE INDUSTRY

FOOD AND BEVERAGES INDUSTRY INCOME: JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019

The results in figure 2 below indicate that the total income of the food and beverages industry was about R 12 660,2 million in Jan-March 2020 which was a decrease of -9,1% when compared to income of about R 13 934,4 million for Jan-March 2019. All categories of food and beverage had a decline with catering service having the highest decline (-14,7%), followed by restaurants and coffee shops (-10,0%) and take-away and fast food outlets (-4,9%) during the period under review.

Figure 2: Total income by type of food and beverage industry: Jan-March 2020 compared to Jan-March 2019



Source: Stats SA: Food and Beverages data cuts, June 2020

Table 10 indicates that growth in total income for different food and beverages categories. When comparing month to month performance, the results show that there was a steep decline in income for most food and beverages types in March 2020 compared to March 2019 with the exception of catering services which also experienced declines in January and February 2020 compared to same months in 2019. The decline in the income received by the food and beverage industry could be due to Covid-19 lockdown measures which was implemented on March 27th 2020 whereby trade with all food and beverage services were closed by the government to limit the spread of COVID-19.

Table 10: Change in income by food and beverage type for Jan, Feb and March

Food and Beverages categories	Jan 2020vs Jan2019	Feb2020vs Feb 2019	March 2020vs March 2019
Catering services	-14,9%	-6,6%	-31,3%
Take-away and fast food outlets	7,0%	4,0%	-30,8%
Restaurants and coffee shops	4,0%	4,3%	-51,6%
Total	2,5%	2,7%	-41,5%

Source: Stats SA: Food & Beverage data cuts May 2020

2.3 AVIATION

PASSENGER ARRIVALS MOVEMENT: JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019

Table 11 below indicates the total passenger arrivals in Airports Company South Africa (ACSA) airports during Jan-March 2020 compared to Jan-March 2019. Total passenger arrivals decreased by -12.7% moving from 5 231 201 in Jan-Mar 2019 to 4 569 312 in Jan-Mar 2020. Regional, international and domestic passenger arrivals decreased by -23,5%, -16,0% and -11,0% respectively during the same period under review.

Table 11: Arriving passengers to South Africa by region Jan-March 2020 compared to Jan-March 2020

Arriving Passengers	Jan-Mar 2019	Jan-Mar 2020	Difference	% Change
International	1 485 648	1 248 091	-237 557	-16,0%
Regional	122 198	93 491	-28 707	-23,5%
Domestic	3 611 896	3 216 273	-395 623	-11,0%
Unscheduled	11 459	11 457	-2	-0,02%
Total	5 231 201	4 569 312	-661 889	-12,7%

Source: ACSA data, March 2020

Table 12 indicates the growth in total arriving passengers for Jan, Feb and March 2020 compared to Jan, Feb and March 2019. Total passengers experienced an increase in Jan and Feb 2020 compared to Jan and Feb 2019. In March 2020 there was a decline of -44,5% in total passengers arriving compared to March 2019. The decline experienced in March 2020 passenger arrivals could be due to the lockdown measures implemented by most countries resulting in the closing of borders.

Table 12: Total passengers arriving for Jan, Feb and March 2020 compared to Jan, Feb and March 2019

Total passengers arriving	2020	2019	% Change
Jan	1 829 188	1 718 657	6,4%
Feb	1 702 335	1 618 490	5,2%
Mar	1 050 319	1 894 054	-44,5%

Source: ACSA data, March 2020

PASSENGER DEPARTURE MOVEMENTS: JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019

Table 13 below shows the total passengers departing from ACSA airports during the period Jan-Mar 2020 compared to Jan-Mar 2019. Total passengers departing decreased by -12.2% in Jan-Mar 2020 compared to Jan-Mar 2019. Regional, international and domestic passengers departing from different ACSA airports recorded a decrease in Jan-Mar 2020 compared to same period last year.

Table 13: Departing passengers from South Africa by region: Jan-Mar 2020 compared to Jan-March 2020

Departing Passengers	Jan-Mar 2019	Jan-Mar2020	Difference	% Change
International	1 498 301	1 281 738	-216 563	-14,5%
Regional	124 291	91 007	-33 284	-26,8%
Domestic	3 626 383	3 233 653	-392 730	-10,8%
Unscheduled	12 779	12 382	-397	-3,1%
Total	5 261 754	4 618 780	-642 974	-12,2%

Source: ACSA data, March 2020

Table 14 below shows total passengers departing for Jan, Feb and March 2020 compared to Jan, Feb and March 2019. Total passengers departed recorded an increase Jan and Feb 2020 compared to Jan and Feb 2019. In March 2020 there was a decline of -71, 3% in total passengers departing compared to March 2019. Similar to the passengers arriving, as of March 27th 2020, passengers could also not leave the country because of COVID-19 lockdown regulations. Repatriation flights had to be arranged in order for travellers to leave South Africa during lockdown.

Table 14: Total passengers departing for Jan, Feb and March 2020 compared to Jan, Feb and March 2019

Total passengers departing	2020	2019	% Change
Jan	1 784 527	1 686 290	5,5%
Feb	1 693 935	1 621 667	4,3%
March	1 140 318	1 953 797	-71,3%

Source: ACSA data, March 2020

3. TOURISM RELATED INDUSTRY EMPLOYMENT JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019

EMPLOYMENT OF TOURISM RELATED INDUSTRIES JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019

NOTE: Previous quarterly performance reports provided estimates on the number of direct jobs created by the tourism sector in South Africa by applying ratios to the different tourism related industries. The ratios are sourced from the latest Tourism Satellite Account. However due to the uncertainty related to covid-19, tourism ratios will not be applied therefore this section reports on the total number of jobs created by the tourism related industries of which some could be due to the direct contribution of tourism.

The information presented in this section uses Stats SA's Quarterly Labour Force Survey (QLFS) data cuts to provide employment for tourism related industries which are identified in the Tourism Satellite Account. Table 14 indicates that about 17,7% of South African jobs were created by tourism related industries during Jan-March 2020 which was an increase of 1.7% (49 017) in total jobs created by the tourism related industries when compared to Jan-March 2019.

Table 14: Tourism related industries employment: Jan-March 2020 compared to Jan-March 2019

Employment	Jan-March 2020	Jan-March 2019	Difference	% Growth
Total Tourism Related Industries Employment	2 906 779	2 857 708	49 071	1.7%
Total Employment	16 382 555	16 291 436	91 119	0,6%
& share of tourism related industries to total employment	17,7%	17,5%		

Source: Stats SA, Q1 2020 Quarterly Labour Force Survey data cuts

Table 15 provides the share of the total jobs created by the different tourism related industries for the period Jan-March 2010 compared to Jan-March 2019. When tourism ratios are not applied, almost a half of tourism related jobs are created by the retail industry

(47,0%) for the period Jan-Mar 2020 followed by road passenger transport industry (22,9%) and food and beverages (13,6%). Considering that South Africa's lockdown was implemented towards the end of March (27th March 2020), these figures could change in the next quarter (April-June 2020) as most of the tourism related industries were closed in order to prevent the spread of COVID-19.

Table 15: Tourism related industries share of employment: Jan-March 2020 compared to Jan-March 2019

Tourism Related Industries	Jan-March 2020	Jan-March 2019
	% Share	
Accommodation	5,3%	5,2%
Food and Beverages	13,6%	12,9%
Railway passenger transport	2,3%	2,3%
Road Passenger transport	22,9%	23,3%
Water passenger transport services	0,0%	0,0%
Air Passenger Transport	0,9%	0,9%
Transport Equipment Rental	0,5%	0,6%
Travel agencies	1,0%	1,2%
Cultural Services	3,7%	3,2%
Sporting and other recreation services	2,8%	3,1%
Retail trade	47,0%	47,3%
Total Tourism Related Industries Employment	100,0%	100,0%

SECTION 3: GLOBAL INTERNATIONAL TOURIST ARRIVALS BY REGION

FIGURE 1: PERCENTAGE GROWTH OF GLOBAL TOURIST ARRIVALS BY REGION: JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019



UNWTO has only released percentage growth by region for January-March 2020 compared to January-March 2019 and absolute figures have not yet been released. The tourism sector has been one of the most affected sectors by COVID-19 with most airlines being grounded, hotels closed and travel restrictions implemented in most countries around the world (UNWTO, 2020). The effect of the pandemic can be seen in the tourist arrival figures for the period Jan-March 2020 compared to the same period in 2019. Total international tourist arrivals declined by -22.4% compared to the same period last year. Asia & the Pacific had the highest decrease (-34.6%) followed by Europe (-19.1%), Americas (-15.2%), Africa (-12.5%) and Middle East (-10.8%). For the period Jan-March 2020, UNWTO has estimated a loss of USD\$ 80 billion in tourism receipts for the period under review. Further estimates from UNWTO also indicate that in 2020 international tourist arrivals could decrease by about 850 million to 1.1 billion (UNWTO, 2020).

SECTION 4: GLOBAL TOURISM RELATED INDUSTRIES PERFORMANCE

4.1 GLOBAL HOTEL PERFORMANCE, JAN-MARCH 2020 COMPARED TO JAN-MARCH 2019.

Table 16 indicates the global hotel performance for the period Jan-March 2020 compared to Jan-March 2019 and the source for the information is STR Global. Comparing Jan-March 2020 to Jan-March 2019, global hotel industry occupancy rates have declined for all regions with Asia and the Pacific having the highest decline (-37,3%), followed by Europe (-23,4%), Africa and the Middle East (-17,1%) and the Americas (-16,1%). Another key indicator used to measure hotel performance is the Average Daily Rate (ADR) which provides the average rate paid for rooms sold and is calculated by dividing room revenue by rooms sold. Most regions also recorded a decline in ADR during Jan-March 2020 compared to the previous quarter. The Middle East and Africa recorded the highest decline (-5,0%) followed by Americas (-3,7%), Europe (-1,9%) and Asia and the Pacific (-1,7%) during the period under review. The Revenue per available room (RevPar) also declined for all regions with Asia and the Pacific recording the highest decline -38,4%. The results indicate that the Covid-19 pandemic has had a significant impact on the hotel industry therefore many countries have started to provide financial assistance to the hotels and other accommodation types (WTTC, 2020).

Table 16: Hotel performance Jan-March 2020 compared to Jan-March 2019

Region	Occupancy rate (%)			Average Daily Rate (ADR)			Revenue per available room (RevPAR) US\$		
	2019 Jan-Mar	2020 Jan-Mar	% Change	US\$ 2019 Jan-Mar	US\$ 2020 Jan-Mar	% change	US\$ 2019 Jan-Mar	US\$ 2020 Jan-Mar	% Change
Asia and the Pacific	67,1%	42,1%	-37,3%	100,81	99,07	-1,7%	67,6	41,7	-38,4%
Americas	61,4%	51,5%	-16,1%	128,87	124,12	-3,7%	79,2	64,0	-19,2%
Europe	63,7%	48,8%	-23,4%	112,67	110,58	-1,9%	71,8	54,0	-24,7%
Africa & Middle East	66,5%	55,1%	-17,1%	134,85	128,13	-5,0%	89,7	70,7	-21,3%

Source str Global Hotel Review: March 2020

4.2 AIR TRANSPORT PERFORMANCE INDICATORS JAN-MARCH 2019 COMPARED TO JAN-MARCH 2020

The airline industry has also been negatively affected by the COVID-19 lockdown regulations. Table 17 below indicates the performance of the airline industry during the period Jan-March 2020 compared to Jan-March 2019. Revenue passenger kilometres (RPKs) for the total industry declined by -22.2% which was influenced by both the international and domestic markets RPK declining by -21,7% and -23,1% respectively during the period Jan-March 2020 compared to Jan-March 2019. Available Seat per Kilometre also recorded a -14.7% decline with the international market having highest decline (-16, 1%) followed by the domestic market (-12, 2%) in ASK during the period under review. Passenger load factor also declined by -7, 1% for the total market. Considering the impact that COVID-19 has had on the airline industry, the International Airport Transport Association (IATA) has made a call for government's in Europe, Africa and the Middle East to provide emergency interventions as many airlines are facing a financial crisis due to the collapse in air travel as a result of the Covid-19

pandemic. Taking into account the travel restrictions and the expected global economic recession, IATA estimates that airlines are expected to lose \$84.3 billion in 2020. Revenues are also expected to drop by about 50% to \$419 billion in 2020 compared to \$838 billion in 2019 (IATA, 2020).

Table 17: Airline performance Jan-March 2020 compared to Jan-March 2019

Total Market	RPK		ASK		PLF	
	Year on year % Change		Year on year % Change		Year on year % Change	
	2020	2019	2020	2019	2020	2019
International	-21,7%	4,3%	-16,1	5,0%	-5,4%	--0,5%
Domestic	-23,1%	5,6%	-12,2%	5,7%	-10,2%	0,0%
Total Market	-22,2%	4,8%	-14,7%	5,2%	-7,1%	-0,4%

Source: IATA, Air Passenger Market Analysis, March 2020

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