

statistics south africa

# Tourism satellite accounts

Linking Government Strategies and the  
Tourism Satellite Account in South Africa

( • n a t i o n a l • a c c o u n t s • )

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## List of abbreviations

AsgiSA	Accelerated Shared Growth Initiative for South Africa
BEE	Black Economic Empowerment
BoP	Balance of Payment
BPO	Business Process Outsourcing
CPC	Central Product Classification
DEAT	Department of Environmental Affairs and Tourism
DoT	Department of Transport
DTI	Department of Trade and Industry
DTS	Domestic Tourism Survey
EAS	Economic Activity Survey
GDP	Gross Domestic Product
GEAR	Growth, Employment and Redistribution
GHS	General Household Survey
IES	Income and Expenditure Survey
IRTS	International Recommendations on Tourism Statistics
ISIC	International Standard Industrial Classification of all Economic Activities
ITTT	Interim Tourism Task Team
LED	Local Economic Development
LSS	Large Sample Survey
PDCs	Previously Disadvantaged Communities
PoA	Programme of Action
RDP	Reconstruction and Development Programme
SAA	South African Airways
SAACI	Southern African Association for the Conference Industry
SADC	South African Development Countries
SAT	South African Tourism
SDI	Spatial Development Initiative
SMME	Small, Medium and Micro Enterprises
SNA	System of National Accounts
Stats SA	Statistics South Africa
STS	System of Tourism Statistics
SU-tables	Supply and Use tables
TBCSA	Tourism Business Council of South Africa
TEP	Tourism Enterprise Programme
TGS	Tourism Growth Strategy
TLG	Tourism Leadership Group
TSA	Tourism Satellite Account
TSARMF	Tourism Satellite Account Recommended Methodological Framework
TVA	Tourism Value Added
UK	United Kingdom
UN	United Nations
UNWTO	United Nations World Tourism Organisation
USA	United States of America
VFR	Visiting Friends and Relatives

## Chapter 1 Introduction

The World Tourism Organisation (UNWTO) defines tourism as ‘the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited’. Tourism has become an important economic and social activity in the national and global economy during the last decades. Currently, however, statistical information on the nature, progress and consequences of tourism is mainly based on arrivals and overnight stay statistics and Balance of Payment (BoP) information for South Africa, which do not grasp the whole economic phenomenon of tourism. Consequently, government, businesses and citizens may not receive accurate information that is necessary for effective public policies and efficient business operations.

Although tourism is by its nature a demand-driven phenomenon, it is necessary, from a macroeconomic point of view, to observe how the match between demand and supply operates, and how the latter affects the basic macroeconomic variables of the country of reference. Within a context of macroeconomic analysis, the relationship between supply and demand is best studied within the general framework of national accounts.

Tourism plays a significant role in the South African economy, based on the number of inbound arrivals. At the national conference of the Southern African Association for the Conference Industry (SAACI), the Minister of the Department of Environmental Affairs and Tourism (DEAT) alluded that arrival statistics for 2006 show that South Africa received almost 8,4 million inbound arrivals – an increase of more than one million visitors compared to the previous year (2005)<sup>1</sup>.

However, unlike output-defined industries such as agriculture or manufacturing, the primarily demand-defined tourism sector is not measured as a sector in its own right in national accounts. Tourism is not a clearly defined industry in the International Standard Industrial Classification of all Economic Activities (ISIC), but rather an amalgamation of industries such as transportation, accommodation, food and beverage services, recreation and entertainment, travel agencies etc. This is because industries are classified according to the goods and services they produce, while tourism is a consumption-based concept that depends on the status of the consumer. A major reason for the difficulties in measuring the size of tourism is the fact that in the ISIC, industries are created on the basis of their activity or output, rather than on data on their customers, whereas tourism is defined by the characteristics of the consumers – the tourists – at the moment of consumption. Furthermore, tourism consumption includes ‘tourism-characteristic’ (i.e. accommodation, travel services, cable cars, etc.) and ‘non-tourism-related’ (retail trade) goods and services, which deliver their services largely to non-tourists. The key factor, from a measurement standpoint, is to relate purchases by tourists to the total supply of these goods and services within a country.

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<sup>1</sup> <http://www.deat.gov.za/NewsMedia/Speeches/2007Jul23/23072007.doc>

The 1993 System of National Accounts (SNA) recommends the development of Satellite Accounts for the measurement of economic phenomena that is not explicitly shown in the core set of accounts. The Tourism Satellite Account (TSA) was therefore developed for the explicit study of tourism-connected industries and products. A TSA<sup>2</sup> is a statistical instrument used to measure the size of the tourism sector's contribution to the economy of a country according to international standards of concepts, classifications and definitions which will allow for valid comparisons with other industries and, eventually, between individual countries and between groups of countries. A TSA is also used to analyse all aspects of demand for goods and services which might be associated with tourism within the economy, to observe the operational interface with the supply of such goods and services within the same economy of reference, and to describe how this supply interacts with other economic activities<sup>3</sup>. A 'Satellite Account' is a term developed by the United Nations (UN) to measure the size of economic sectors not defined as industries in national accounts.

Given the difficulties of defining and measuring the size of tourism and the need to have accurate information about its size and structure, the UN recommends the development of a TSA. A TSA makes it possible to separate and examine the demand and supply sides of tourism in an integrated system, which describes the production and demand aspects within the context of the entire economy. Its focal point is on monetary values<sup>4</sup> that regularly provide data which are comparable over time on a national as well as international level, and which are largely comparable with other fields of economic activities. TSA data are internally consistent and linkable to the macroeconomic framework.

The fundamental structure of a TSA is based on the general relationship existing within an economy between the demand of goods and services generated by tourism on the one hand, and their supply on the other hand. A TSA thus provides a framework for policy analysis of issues related to tourism economics, as well as for model-building, tourism growth analysis and productivity measurements. TSAs have been designed in such a way that not all of their elements need to be developed from the outset.

On the basis of these concepts, definitions and classifications, which indicate the boundaries of the tourism sector, the Tourism Satellite Account Recommended Methodological Framework (TSARMF) developed by the United Nations World Tourism Organisation (UNWTO) recommends the development of 10 main accounting tables that allow for the analysis of the economic features of tourism, encompassing demand, supply, impact on employment, etc. Table 1 and Figure 1 present the tables of the TSA in a condensed format while Annexures 2–11 present the 10 tables of the TSA in a detailed format. Each table places the focus on a different aspect of the tourism sector, but they are not completely independent as there are obvious links between them, especially when used for analysis.

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<sup>2</sup> It is important to note that a TSA will only measure the direct impact of tourism on the economy, not the indirect and induced effects

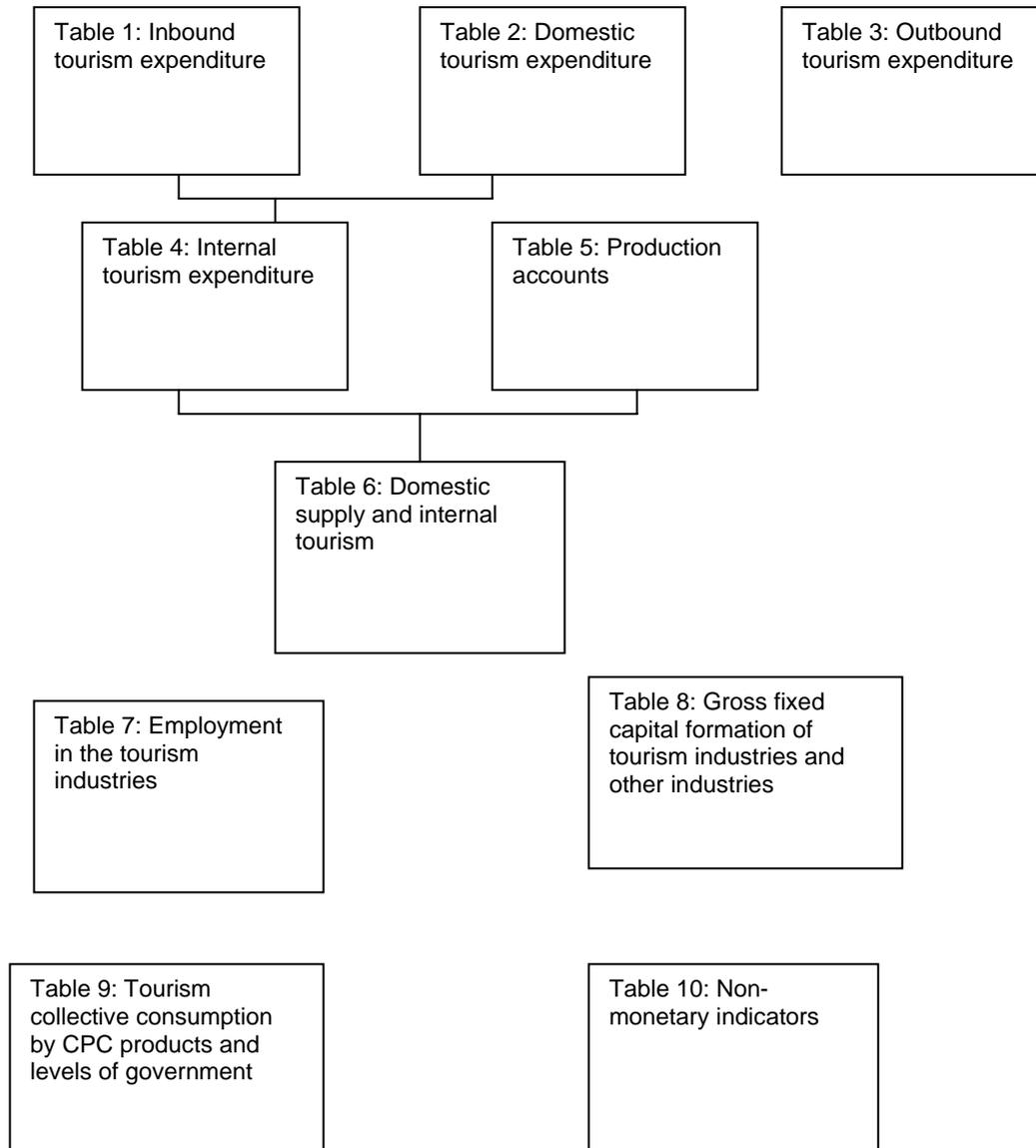
<sup>3</sup> Source: TSARMF – UNWTO

<sup>4</sup> Although non-monetary indicators are provided in table 10 of the TSA

**Table 1: Set of 10 tables constituting the TSA**

<b>Table</b>		<b>Comment</b>
1	Inbound tourism expenditure by products and categories of visitors	Tables 1 to 3 focus on the demand perspective and analyse visitor final consumption expenditure in cash, treating 'inbound', 'domestic' and 'outbound' tourism separately. Although the product breakdown is shared, the aim is to distinguish between the types of visitors.
2	Domestic tourism expenditure by products, by type of trips and categories of visitors	
3	Outbound tourism expenditure by products, by type of trips and categories of visitors	
4	Internal tourism expenditure by products and types of item	Table 4 also focuses on the demand perspective and combines all visitor final consumption expenditure in cash associated with inbound (Table 1) and domestic (Table 2) tourism with other components of visitors' consumption.
5	Production accounts of tourism and other industries	Table 5 focuses on the supply perspective and analyses the production of tourism characteristic industries as well as other industries. The production accounts (output and intermediate consumption by product) are shown in a format similar to the information included in a set of supply and use tables.
6	Domestic supply and internal tourism consumption by products	Table 6, which includes the confrontation between supply and internal tourism consumption, is regarded as the core of the TSA as it allows for the computation of tourism value added/ GDP and its components.
7	Employment in the tourism industries	Table 7 provides a detailed description of employment in the tourism sector, although this will be supplemented by the LAT.
8	Gross fixed capital formation of tourism industries and other industries	The tourism gross fixed capital formation still needs development.
9	Tourism collective consumption by CPC products and levels of government	Focuses on the involvement of government sector needs to be tied more closely with COFOG.
10	Non-monetary indicators	The 1993 SNA provides for physical indicators as part of satellite accounts. Table 10 therefore presents a number of non-monetary (physical) indicators related to tourism such as the number of trips and overnight stays, the number of establishments in tourism-characteristic and connected activities.

**Figure 1: Set of 10 tables constituting the TSA**



The UNWTO is currently focused on:

- The revision of the International Recommendations on Tourism Statistics (IRTS); and
- An update of the TSARMF.

Both documents were discussed at the eighth meeting of the Committee on Statistics and Macroeconomic Analysis of Tourism held in Lisbon, Portugal in March 2007, and subsequently the provisional draft documents (both the IRTS and the TSARMF), as discussed in various working groups, were reviewed by the UN Expert Group on Tourism Statistics at the UN in New York in June 2007<sup>5</sup>.

Improvements were suggested to the IRTS before its submission to the UN Statistics Commission during the first quarter of 2008 for adoption as an international standard. Importantly, it was decided that specific and practical compilation guides need to be developed to assist countries to implement these two manuals.

The aim of this discussion document is to show how government tourism strategies in South Africa can be complemented and informed by the use of information from the compilation of a TSA for South Africa. It examines government tourism strategies in the context of the information that the TSA can provide in order to monitor the impact and the progress of the policies.

A study of the South African Tourism Cluster by the Tourism Leadership Group (TLG) has shown that the South African tourism sector possesses a strong group of inter-related and supporting businesses to build future successes and develop the tourism sector. However, the tourism distribution system (travel agents and tour operators) and component providers (accommodation, attractions, transportation, etc.) require further development and integration to achieve either satisfactory or optimal levels, particularly as they relate to product development, delivery and marketing<sup>6</sup>.

An inter-institutional committee for the TSA was established because the development of the TSA is dependent on data from a number of different sources. This has been a successful achievement in South Africa, with Statistics South Africa (Stats SA), South African Tourism (SAT), DEAT, the South African Reserve Bank (SARB), the Department of Home Affairs (DHA), and the Department of Trade and Industry (DTI) all actively participating<sup>7</sup>. The inter-institutional committee works on two levels. The first (higher) level committee is the TSA Steering Committee, consisting of the Heads of Departments, so that recommendations from the working group can be put into practice without undue delay. The committee is chaired by the Statistician-General (SG) of Stats SA. The second-level committee is the TSA working group, which allows members who are actively involved in tourism and tourism data to exchange ideas, work on methodological issues around TSA compilation, etc.

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<sup>5</sup> <http://www.unwto.org/index.php>

<sup>6</sup> Source: National Collaborative Planning Action Initiative, South African Tourism Cluster (1999)

<sup>7</sup> National Treasury also represented since 2007

## Chapter 2 Government's role in tourism

Government plays a crucial part in the tourism sector through a range of functions that include:

- Regulatory controls (licensing laws for businesses, vehicles, companies and boats; business registration, taxation, foreign investment, building codes);
- Provision of national services for visitors (customs, immigration);
- Policy formulation (economics, tourism, transport, foreign affairs, sport and recreation, telecommunications, etc.);
- Planning (regional and provincial development, zoning system for land use);
- National issues and interests (e.g. environmental issues – legislation for conservation, protection and preservation of endangered species, threatened habitats, fragile ecosystems, coastal erosion, salinity; establishment of national parks and biosphere reserves, world heritage sites, etc.); and
- Infrastructure (roads, railways, airports, ports, communications systems, power, water, public transport, etc.).

Government should thus<sup>8</sup>:

- Provide legislation and regulation regarding the way visitors should be received and served;
- Provide the rules to which visitors should abide;
- Act for the general promotion of tourism to the country;
- Develop the instruments that make the evaluation of the tourism policies possible; and
- Maintain order and security so that tourism can occur.

Government is also expected to provide support through different incentives, either through<sup>9</sup>:

- The direct provisioning of services;
- Using instruments to make the intervention of the private sector profitable such as development funds aimed at promoting specific tourism-oriented investments;
- Tax incentive-oriented investments towards specific geographic areas or domains of activity;
- Direct physical investments in infrastructure; or
- Development of public enterprises in certain domains of activities such as transport, accommodation, recreation facilities, etc.

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<sup>8</sup> TSARMF, UNWTO

<sup>9</sup> TSARMF, UNWTO

Government provides the policy framework within which tourism exists<sup>10</sup>. These policies must incorporate economic, social, and environmental objectives. It is important that national and regional tourism planning by government be based on IRTS<sup>11</sup> designed to measure the many aspects of the contribution of tourism to the national economy. Government should be in a position to examine the effects of its tourism policy, the effects that other policies have on tourism, or examine the economic effects of existing policies on tourism, or of proposed alternatives. For example, government can show the net effective taxation of tourism that exists or provide a quantitative assessment of policy alternatives.

### **Enhancing the role of tourism in socio-economic development and poverty reduction (planning and policy formulation)**

The South African government encourages the private sector and other stakeholders to take collaborative action to develop enterprise and employment opportunities for the poor. Such actions would include improvement of the quality of work, capacity and skills of poor people through training and upgrading the skills related to tourism services, including improved access to market and resource information. An awareness should also be established regarding business firms – which comprise the mainstream tourism sectors – that have already been helping poor people, for example, through employment in certain categories of work. This awareness should lead to the recognition that it is possible to do more in their role as stakeholders who can create opportunities for tourism to contribute more to poverty reduction.

### **The role of the Tourism Satellite Account in socio-economic development and poverty reduction**

The TSA will assist government, the private sector and other stakeholders in measuring the development of enterprise and employment opportunities created for the poor.

- Table 7 of the TSA will provide government, the private sector and other stakeholders with information on employment in the tourism industries (see Annexure 8). This information will assist government, the private sector and other stakeholders to measure the number of jobs created in the identified tourism industries, the gender of the employed person, number of establishments and the status of employment in the tourism industries. Government can use this information to monitor and assess the impact of training to promote skills development and employment in the identified tourism industries.

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<sup>10</sup> In South Africa, DEAT is responsible for providing the policy framework within which tourism exists, but this differs from one country to another

<sup>11</sup> The compilation of the tourism statistical database must be based on the IRTS developed by the UNWTO

## Chapter 3 Government strategies for tourism development

Tourism development is subject to policies and priorities from government ministries or departments such as the DTI and DEAT. In 1996 the government launched the White Paper<sup>12</sup> on the Development and Promotion of Tourism in South Africa<sup>13</sup>. Subsequent to that, the Tourism Growth Strategy (TGS) was passed by Cabinet in 2002 with the aim of ensuring that tourism contributes more towards the GDP and creates more jobs. The purpose of the tourism strategies is to provide a vision for the sustainable development of tourism over the next ten years<sup>14</sup>. These strategies provide a vision, clear goals and actions for completion by government and industry, to meet the challenges and to capitalise on the opportunities for the industry, while reflecting government, industry and community priorities. DEAT, in collaboration with SAT, monitors the progress of the tourism strategies in South Africa through the formation of steering committees and task teams.

The South African government is faced with the challenge of credibly measuring the current situation in the tourism sector within the national and provincial economies. Tourism, as one of the largest global industries and employers, has a significant role to play in the economies of developed and developing countries<sup>15</sup>. It is increasingly an important development strategy for unemployment reduction, economic growth, infrastructure development, etc. in most countries. Tourism continues to be an ongoing social, economic and environmental challenge and very few countries around the world have developed any comprehensive strategies to maximise the benefits of tourism, or to manage the field proactively for the purpose of generating desirable investment and tourism flows<sup>16</sup>.

The following key government strategic initiatives relating to tourism were identified for reference years 1996 to 2006:

### 3.1 1996 White Paper on the Development and Promotion of Tourism in South Africa<sup>17</sup>

The DEAT appointed the Interim Tourism Task Team (ITTT) to monitor the progress of the 1996 White Paper. The ITTT held 10 workshops countrywide to obtain inputs for the 1996 White Paper, and more than 100 written submissions were received and reviewed. During 2001, SAT launched the TGS and Domestic TGS as follow-up strategies to the 1996 White Paper.

The key vision of the 1996 White Paper was to develop the tourism sector as a national priority in a sustainable and acceptable manner, so that it would contribute significantly to the improvement of the quality of life of every South African. As a leading sector within the national economic strategy, a globally competitive tourism sector will be a major force in the reconstruction and development efforts of government.

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<sup>12</sup> Source: 1996 White Paper on the Development and Promotion of Tourism in South Africa – DEAT

<sup>13</sup> Hereinafter referred to as 'the 1996 White Paper'

<sup>14</sup> From 2002 to 2012

<sup>15</sup> Source: A consensus building approach for optimising tourism as a sustainable development strategy

<sup>16</sup> Source: Satellite and resources accounting as tool for tourism planning in Southern Africa, DEAT

<sup>17</sup> <http://www.environment.gov.za/PolLeg/WhitePapers/tourism96.htm>

Domestic tourism plays an important role in the South African tourism sector<sup>18</sup>. This market continues to grow as people were previously neglected to become tourists and travellers themselves. Inbound tourism is also a vital element of the South African tourism sector since they spent an average of R14 000 (including airfares) in 1996<sup>19</sup>.

The main economic objectives of the 1996 White Paper on the Development and Promotion of Tourism in South Africa are as follows:

- To generate economic growth and foreign exchange, by aggressively developing and promoting tourism;
- To establish tourism as a national priority;
- To create sustainable employment opportunities and contribute to the well-being of all the people of South Africa;
- To optimise opportunities for Small, Medium and Micro Enterprises (SMMEs) – specifically with regard to emerging entrepreneurs;
- To use tourism to aid the development of rural communities;
- To promote domestic tourism among all South Africans;
- To encourage tourism growth and cooperation in Southern Africa;
- To create a climate conducive to tourism investment;
- To encourage linkages between tourism and other industries in order to curb leakages and stimulate the multiplier effect; and
- To lengthen the tourism season in order to minimise the negative effects of seasonality on the industry.

The following were used as guiding principles for the development of responsible tourism:

- Tourism will be private sector driven;
- Government will provide an enabling framework for the industry to flourish;
- Effective community involvement will form the basis for tourism growth;
- Tourism development will be underpinned by sustainable environmental practices;
- Tourism development is dependent on and the establishment of cooperation and close partnerships among key stakeholders;
- Tourism will be used as a developmental tool for the empowerment of previously neglected communities and should partly focus on women empowerment in such communities;
- Tourism development will take place in the context of close cooperation with other states within Southern Africa; and
- Tourism development will support economic, social and environmental goals and policies of government.

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<sup>18</sup> Source: 1996 White Paper on the Development and Promotion of Tourism in South Africa – DEAT

<sup>19</sup> Source: 1996 White Paper on the Development and Promotion of Tourism in South Africa – DEAT

### 3.1.1 The role of the Tourism Satellite Account in informing the 1996 White Paper on the Development and Promotion of Tourism in South Africa

The TSA will assist government in measuring four of the ten objectives of the 1996 White Paper, namely, to generate economic growth, to promote domestic tourism, to create linkages between tourism and other industries, and to create sustainable employment opportunities (see section 3.1).

- Table 1 of the TSA will provide information on inbound tourism expenditure by products and categories of visitors (see Annexure 2). Inbound tourism expenditure for tourists (same-day visitor information is not available at present) will be presented according to the following products and services:
  - accommodation services for visitors;
  - restaurants and similar
  - passenger transport services;
  - travel agencies and similar;
  - cultural services;
  - sports and recreational services;
  - tourism-characteristic goods;
  - other country-specific tourism-characteristics services;
  - tourism-connected products; and
  - non-tourism-specific products.
- Table 1 will also provide government with information on the total number of inbound trips and the number of overnights stayed within the country by inbound tourists. Since inbound tourism is a vital element (due to the spending patterns of inbound tourists) in the South African tourism sector, this information will help government to measure the total value of inbound tourism consumption expenditure on the above-mentioned products and services and their duration of stay within the country.
- Table 2 of the TSA will present information on domestic tourism expenditure by products, by types of trips and categories of visitors (see Annexure 3). This table will thus provide information on domestic tourism expenditure as well as the domestic part of expenditure on outbound trips. Domestic tourism expenditure for tourists (same-day visitor information is not available at present) will supply government with information on domestic expenditure as well as the domestic part of outbound expenditure on the following products and services:
  - accommodation services for visitors;
  - restaurants and similar;
  - passenger transport services;
  - travel agencies and similar;
  - cultural services;
  - sports and recreational services;
  - tourism-characteristic goods;
  - other country-specific tourism-characteristics services;
  - tourism-connected products; and
  - non-tourism-specific products.

This information will assist government to measure the total value of domestic tourism consumption on the above-mentioned products and services within the country of residence. Table 2 will also provide government with information on the total number of trips undertaken by domestic visitors as well as the number of overnights stayed by domestic visitors. This information will help government to determine the length of stay of domestic visitors.

- Table 4 of the TSA will supply government with information on the total internal tourism consumption by products and types of items (see Annexure 5). Table 4 is the sum of domestic tourism consumption and inbound tourism consumption (Table 1 and Table 2)<sup>20</sup>. Table 4 will provide government with information on internal tourism consumption on the following products and services:
  - accommodation services for visitors;
  - restaurants and similar;
  - passenger transport services;
  - travel agencies and similar;
  - cultural services;
  - sports and recreational services;
  - tourism-characteristic goods;
  - other country-specific tourism-characteristics services;
  - tourism-connected products; and
  - non-tourism specific products.

Table 4 will assist government to measure the value of total internal tourism consumption within the country.

- Table 5 of the TSA will present government with information on the production account of tourism industries and other non-tourism industries (see Annexure 6). This information will assist government to create a linkage between tourism industries and other non-tourism industries such as agriculture, manufacturing, construction, etc.
- Table 6 of the TSA will provide information on the domestic supply and internal tourism consumption by products from which tourism value added (TVA) and the gross domestic product (GDP) generated by internal tourism consumption can be derived (see Annexure 7). Table 6 draws on data from Tables 4 and 5 of the TSA with the objective being to establish how much of the value of each element of domestic supply is attributable to tourism consumption. Table 6 will assist government to measure tourism's contribution to the GDP of South Africa.
- Table 7 of the TSA will supply a detailed description of employment in the different tourism industries, number of jobs created in tourism industries and the gender of employed persons. This information will help government to measure employment created in the identified tourism industries.
- Table 10 of the TSA will provide government with information on non-monetary indicators (see Annexure 11). Table 10 includes the number of trips by type of tourism, categories of visitors and duration of stay, as well as other indicators such as accommodation, mode of transport used by non-resident visitors travelling to the economic territory of the country of reference, and the number and size of the establishments belonging to tourism-characteristics and tourism-connected activities.
- The TSA will not be able to provide government with information on the other six objectives (to create opportunities for the SMMEs, to use tourism to aid the development of rural communities, to create a conducive tourism invest climate, to lengthen the tourism season, to use tourism as national priority and to encourage tourism growth and cooperation in Southern Africa) of the 10 objectives of the 1996 White Paper, since the South African TSA will initially only focus on national tourism information.

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<sup>20</sup> TSARMF, UNWTO

- The TSA will not be able to assist government with information on short-term policies, since the TSA will be compiled annually.

### 3.2 Accelerated and Shared Growth Initiative for South Africa<sup>21</sup>

The President of South Africa has set out the government agenda for the second decade of the country's democracy<sup>22</sup>. This agenda is driven and will be achieved through the Accelerated and Shared Growth Initiative for South Africa (AsgiSA) launched in 2005. This initiative consists of a set of interventions that are intended to serve as catalysts to accelerated and shared growth and development for South Africa.

The main objectives of AsgiSA are to:

- Reduce poverty and unemployment by 50,0% by the year 2014<sup>23</sup>; and
- Enable South Africa to achieve and sustain average economic growth rates of 4,5% between 2005 and 2009, and 6,0% between 2010 and 2014<sup>24</sup>.

These objectives build on the achievements of the country during the first decade of democracy. One of the key constraints that have been identified is a shortage of suitably skilled human resources. Government has thus developed decisive interventions that are intended as responses to counter the identified constraints, thereby enabling the government to achieve set objectives. These interventions have been presented in six broad categories, namely:

- Macroeconomic issues;
- Infrastructure programmes;
- Sector investment strategies (industrial strategies);
- Skills and education initiatives;
- Second economy interventions; and
- Public administration issues.

Under sector investment strategies, two sectors were identified as special priority, namely business process outsourcing (BPO) and tourism. The reason for giving more attention to these sectors is that they are labour intensive and are rapidly growing sectors within the South African economy. Government expects tourism growth to increase its contribution to the GDP from 8,0%<sup>25</sup> in 2005 to 12,0% in 2010 and to increase employment to 400 000 people in 2010<sup>26</sup>. Key issues to be addressed in tourism are marketing, air access, safety and skills development and fostering government/private-sector partnerships.

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<sup>21</sup> <http://www.info.gov.za/asgisa/>

<sup>22</sup> 2004 – 2009.

<sup>23</sup> Source: Accelerated and Shared Growth Initiative for South Africa

<sup>24</sup> Economic growth rate is measured by the GDP

<sup>25</sup> The GDP growth of 8,0% and 12,0% were not published by Stats SA but were proposed by AsgiSA as one of the economic objective

<sup>26</sup> Source: Accelerated and Shared Growth Initiative for South Africa (Discussion document)

### 3.2.1 The role of the Tourism Satellite Account in informing AsgiSA

The TSA will assist government in measuring the objectives of AsgiSA, namely, to halve unemployment (through employment creation) by 50,0% and to achieve a sustainable economic growth. The TSA will also assist government in measuring three of the six intervention strategies, namely, macroeconomic issues, infrastructure programmes, and skills development (see section 3.2).

- Table 1 of the TSA: see section 3.1.1;
- Table 2 of the TSA: see section 3.1.1;
- Table 4 of the TSA: see section 3.1.1. The information from Table 1 will assist government in implementing its objective of sustaining economic growth and its intervention of macroeconomic issues;
- Table 5 of the TSA: see section 3.1.1. The information will give guidance on the change in TVA as a result of the implementation of AsgiSA;
- Table 6 of the TSA: see section 3.1.1;
- Table 7 of the TSA: see section 3.1.1. This information can also be used to assess the impact of training as one of the approaches to promoting skills development and employment in the tourism sector;
- Table 10 of the TSA: section 3.1.1. Government can use information from Table 10 to plan investment on tourism infrastructure based on tourists demand (volume indicators); and
- The TSA will not be able to provide government with information on poverty reduction, public administration issues, sector investment strategies and the intervention of the second economy.

### 3.3 Tourism Growth Strategy<sup>27</sup>

The TGS was launched by SAT in 2001 to market South Africa more effectively in the increasingly competitive global tourism and travel market. SAT has since updated the 2001 TGS to the 2005–2007 TGS. The updated version does not change the tourism vision, but updates and consolidates the strategy with the knowledge and experience gained over the four past years.

The SAT mandate under the Tourism Act<sup>28</sup> is to increase tourism contribution towards GDP growth, job creation and improving the redistribution and transformation of the South African economy. In order to do this, SAT needs to contribute towards attaining six key objectives of the TGS, namely:

- Increase tourist volume;
- Improve geographic spread;
- Increase tourist spend;
- Improve seasonality patterns;
- Increase length of stay; and
- Promote transformation.

<sup>27</sup> <http://www.southafrica.net/satourism/research/viewResearchDocument>

<sup>28</sup> Tourism Act (Act No. 72 of 1993)

In order to achieve the above objectives, SAT has identified the following eight challenges that need to be dealt with:

- **Volume:** According to TGS 2005–07, tourism arrivals have increased by 15,0% from 1990 to 2005, but further growth is essential if tourism is to make an impact on job creation and GDP growth;
- **Value:** SAT has identified two challenges around increasing the value of tourism:
  - Maximise the spend of current travellers to increase revenue; and
  - Maximise the relationship between volume and value in chosen markets in order to maximise return on marketing efforts;
- **Transformation:** South Africa is faced with the challenge of ensuring direct participation by the previously disadvantaged majority in the tourism sector. Tourism is still predominantly white owned and white managed. Transformation is a key opportunity for future growth in tourism;
- **Distribution:** The challenge for TGS is to extend access to market tourism in less developed provinces such as Northern Cape, North West and Free State. According to TSG 2005–07, Gauteng and Western Cape are the two areas most frequently visited by foreign tourists;
- **Seasonality:** South Africa is faced with the challenge of seasonality in domestic and foreign tourism;
- **Risk management:** TGS 2005–07 indicates that tourism industries<sup>29</sup>, particularly those which are heavily dependent on foreign source markets, are vulnerable to unpredictable events outside of their spheres of direct influence;
- **Sustainability:** The future growth of tourism must be sustained in the long run; and
- **Competitiveness:** In order for South Africa to achieve sustained growth, it must be able to differentiate itself from its competitors for the present and for future growth.

SAT will address the above challenges in a way that recognises the realities of a dynamic and difficult global market. SAT will focus their resources and efforts on countries such as Kenya, Nigeria, the United States of America (USA), the United Kingdom (UK), Australia, France, Germany, the Netherlands, and customer segments which are most valuable to South Africa<sup>30</sup>.

The updated TGS focuses on three areas of the tourism marketing strategy development which covers leisure, business tourism and opportunities that allow for a favourable position to South Africa, e.g. 2010 Soccer World Cup, Cricket World Cup, etc.

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<sup>29</sup> Tourism industries which depend heavily on foreign markets are passenger transport airline services, accommodation services, car rental services, etc.

<sup>30</sup> SAT reviews the countries every 3 years.

### 3.3.1 The role of the Tourism Satellite Account in informing the Tourism Growth Strategy

The TSA will assist SAT in measuring three of the six objectives of the TGS, namely, increasing tourist volume, increasing tourist spend, and increasing length of stay. The TSA will also assist SAT in measuring GDP growth and job creation in the tourism industries (see section 3.3).

- Table 1 of the TSA: see section 3.1.1;
- Table 2 of the TSA: see section 3.1.1;
- Table 4 of the TSA: see section 3.1.1;
- Table 5 of the TSA: see section 3.1.1;
- Table 6 of the TSA: see section 3.1.1;
- Table 7 of the TSA: see section 3.1.1;
- Table 10 of the TSA: see section 3.1.1; and
- The TSA will not be able to provide SAT with information on the other three objectives of the TGS, namely, improve seasonality patterns, transformation, and geographic distribution, due to the South African TSA's focus on national tourism.

### 3.4 Domestic Tourism Growth Strategy<sup>31</sup>

The Domestic TGS sets out a plan for how SAT and DEAT, together with the nine provincial tourism authorities, can grow the domestic tourism market in South Africa over the next three years (from the year 2003) in terms of value, volume and distribution<sup>32</sup>.

- **Volume:** the purpose of visit is broken down into visiting friends and relatives (VFR), holiday, business, medical, and religious trips. VFR dominates domestic travel as the main purpose of visit and as a result of higher volume<sup>33</sup>. In 2005, VFR contributed 69,0% to the domestic volume followed by holiday trips (12,0%) and business, medical, and religious trips contributed only 19,0% of total domestic trips<sup>34</sup>.

SAT aims to increase domestic holiday trips through the development of a holiday travel culture among South Africans that promotes short breaks and extended vacation and converts non-holiday travellers to holiday travellers. This requires understanding the needs of holiday travellers, which will facilitate the tailoring of product packages and product development;

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<sup>31</sup> <http://www.southafrica.net/satourism/research/viewResearchDocument>

<sup>32</sup> Source: Domestic Tourism Growth Strategy (2006)

<sup>33</sup> Source: Domestic Tourism Growth Strategy (2006)

<sup>34</sup> Source: Domestic Tourism Growth Strategy (2006)

- **Value:** The total value of the domestic tourism market in 2005 was R21,2 billion<sup>35</sup> with room for growth in the holiday travel segment. VFR contributed 40,0% to domestic spending followed by holiday trips (32,0%), business (12,0%), religious (9,0%) while medical trips comprised only 1,4% of the total domestic tourism expenditure. However, the highest spending per purpose was medical (R2 755) and the lowest was VFR (R339)<sup>36</sup>. The highest spending per item was transport (33,0%), followed by food and beverages (19,0%) and accommodation (16,0%) services<sup>37</sup>;
- **Geographic distribution:** domestic travel (in terms of source and destination) is largely dominated by three provinces, namely KwaZulu-Natal, Gauteng and Western Cape. These three provinces captured 63,0% of the domestic revenue in 2005<sup>38</sup>. SAT aims to increase the number of holiday trips being taken inter-provincially by 2,0% by encouraging holiday travel to non-traditional destinations in the province, i.e. visits to various nature reserves; and
- **Seasonality and consumption patterns:** SAT aims to create year-round trips. Domestic visitors will be encouraged to travel not only during school holidays and December, but to take trips throughout the year.

The strategy sets out ways of unlocking the potential of domestic visitors from the perspective of destination marketing strategies by improving the geographic spread of tourism as well as segment-specific marketing strategies by grouping people with similar characteristics so that the target message and product can be relevant to their needs. This is based on the following conclusions from the market segmentation investigations:

- Targeting and understanding these market segments, to ensure that the desired levels of growth can be achieved;
- Implementing destination marketing initiatives in order to provide a platform upon which to leverage segment-specific growth strategies; and
- Aligning investment in product development with market segment requirements.

#### 3.4.1 The role of the Tourism Satellite Account in informing the domestic Tourism Growth Strategy

The TSA will assist SAT in measuring two of the four objectives of the domestic TGS; namely, increased domestic tourism value and volume (see section 3.4).

- Table 2 compiles the final consumption expenditure in cash of resident visitors in the domestic economy, which means that it also includes the consumption of residents whose trips will take them outside the economic territory of the country of residence and thus will include the corresponding consumption in the country of reference before leaving it or after return<sup>39</sup> (see section 3.1.1);
- Table 10 of the TSA,(see section 3.1.1); and
- The TSA will not be able to provide information on the seasonality and consumption patterns as well as geographic spread, due to the South African TSA's focus on national tourism.

<sup>35</sup> Source: Domestic Tourism Growth Strategy (2006)

<sup>36</sup> Source: Domestic Tourism Growth Strategy (2006)

<sup>37</sup> Source: Domestic Tourism Growth Strategy (2006)

<sup>38</sup> Source: Domestic Tourism Growth Strategy (2006)

<sup>39</sup> Source: TSARMF, UNWTO

### 3.5 Spatial Development Initiatives<sup>40 / 41</sup>

Government, through DEAT, launched a major programme of Spatial Development Initiatives (SDI) in partnerships with the private sector and communities aimed at unlocking the inherent and under-utilised economic potential in areas such as the Wild Coast and Lubombo. For each of these areas government has identified specific priority sectors where investment efforts are to be concentrated.

Tourism is identified as a key national sector for economic growth by means of government's Growth, Employment and Redistribution (GEAR) framework, and in particular through the SDI programme, which specifically includes the Wild Coast and Lubombo SDIs<sup>42</sup>.

The programme objectives alluded to below are relevant to the socio-economic parameters of the areas where job creation and increased levels of income are of paramount, and this has been the most relevant aspect of the programme. These programmes are local economic development (LED) initiatives that are supported by business skills and environmental management training. The programme has been set up to deliver specific programme objectives. These are:

- To generate sustainable economic growth and development in the Wild Coast and Lubombo areas;
- To generate long-term and sustainable employment for local inhabitants;
- To maximise the mobilisation of private investment, especially in the context of community tourism development and to lessen demands on government funds for development projects;
- To broaden ownership patterns in the regional economy;
- To exploit spin-off opportunities from tourism investments for the development of SMMEs and for the development of local communities; and
- To exploit the under-utilised location and economic advantages of SDI areas for export-oriented growth.

#### 3.5.1 The role of the Tourism Satellite Account in informing the Spatial Development Initiative project

The TSA will assist DEAT in measuring two of the six objectives of the SDI, namely, to generate sustainable economic growth and to generate long-term and sustainable employment for local inhabitants (see section 3.5).

- Table 1 of the TSA: see section 3.1.1;
- Table 2 of the TSA: see section 3.1.1;
- Table 4 of the TSA: see section 3.1.1;
- Table 5 of the TSA: see section 3.1.1. This information can be used to create the linkage between tourism industries and other non-tourism industries (non-tourism SMMEs industries);
- Table 6 of the TSA: see section 3.1.1;
- Table 7 of the TSA: see section 3.1.1;

<sup>40</sup> [http://www.environment.gov.za/ProjProg/SDIs/SDI\\_contents.htm](http://www.environment.gov.za/ProjProg/SDIs/SDI_contents.htm)

<sup>41</sup> <http://www.sarpn.org.za>

<sup>42</sup> Source: Spatial Development Initiative Programme: Project 6.7

- Table 10 of the TSA: see section 3.1.1. This will provide an important link between volume and value and will enable DEAT to inspect whether the amount spent correlates with the number of visitors recorded; and
- Currently information for developing TSAs regionally in South Africa is not available and will not be available in the long term. The TSA will not be able to provide DEAT with information on the other four of the six objectives of the SDI, namely, under-utilised location and economic advantages of SDI areas, broadening ownership patterns in the regional economy, pinpointing opportunities from tourism investment for the SMMEs, and the maximisation of the private investment.

### 3.6 Tourism Enterprise Programme<sup>43</sup>

The Tourism Enterprise Programme (TEP) is a joint DEAT and Business Trust initiative established in July 2002. At the beginning of each financial year both DEAT and Business Trust set targets for the TEP and meet on a quarterly basis (during the steering committee meetings) to monitor whether the TEP has achieved the set targets. The responsibility of the programme is to undertake tourism development planning, investment promotion and small business support and development. The programme encourages and facilitates the growth and expansion of the SMMEs for the creation of employment and income-generating opportunities.

The programme aims to assist tourism SMMEs in the following ways:

- Marketing assistance for events;
- Development of business and marketing plans;
- Preparation and submission of tenders and proposals to become a supplier;
- Training;
- Attending exhibitions and conferences;
- Certification and licensing of businesses; and
- Identification of service.

The TEP's strategic initiatives are divided into two categories of activities, both of which are aimed at maximising growth opportunities for SMMEs. They are as follows:

#### 3.6.1 National events

National events (such as the Tourism Indaba and World Cup 2010) provide multiple direct and indirect tourism opportunities for SMMEs. The challenge is to integrate the SMMEs into the process in a systematic way that allows them to benefit equitably from such events.

The TEP will participate through:

- Working with key stakeholders to procure SMMEs and outsource an explicit objective of the event; and
- Introducing appropriate SMMEs to deliver the services, and concluding transactions through a range of assistances to these SMMEs.

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<sup>43</sup> [www.tep.co.za](http://www.tep.co.za)

### **3.6.2 Sector strategies (market development)**

The South African tourism sector comprises a large number of subsectors. Some sectors are growing whereas others are not fully developed. These underdeveloped sectors represent opportunities for growth and for SMME participation. A TEP attempts to understand the dynamics, leverage points, weaknesses and opportunities in each sector and then designs its SMME intervention strategies accordingly. This approach has been highly successful in the TEP's craft-sector work. It has led to the creation of the One-of-a-Kind craft exhibition which now provides a platform for South Africa's best crafters to offer their products to national and international markets.

### **3.6.3 The role of the Tourism Satellite Account in informing the Tourism Enterprise Programme**

The TSA will assist DEAT and Business Trust in measuring only one of the seven objectives of the TEP, namely, the identification of services (see section 3.6).

- Table 5 of the TSA (see section 3.1.1): this information will assist DEAT and Business Trust to identify tourism products and services that need to be supplied by tourism SMMEs; and
- The TSA will not be able to provide information on the preparation and submission of tenders and proposals to become a supplier; compiling business and marketing plans, training, attending exhibitions and conferences, and certification and licensing of businesses.

## **3.7 Facilitation of travel and development of transport and other tourism-related infrastructure**

Government needs to improve various modes of transport, particularly air, land and water, in combination with upgraded tourism-related infrastructure to facilitate access to tourist sites. It is possible to develop guidelines for barrier-free tourism practices within African countries for services and facilities involved with transport, accommodation, tourism sites and tour programmes that can be made more accessible for tourists. Efforts to facilitate travel must be strengthened by considering the costs and benefits of greater liberalisation of visa policies and cross-border formalities.

### **3.7.1 Transportation**

The successful development of any tourism destination is dependent on reliable and, in many cases, affordable forms of transportation. Air access is of critical importance to South Africa. Of particular importance is the ability to attract the high-yield overseas markets and to develop a wide range of secondary tourist attractions throughout the country.

The majority of overseas travellers access the country by air, and the availability and cost of flights have a major influence over their travel choices and itineraries. According to SAT, South African Airways (SAA) and Nationwide Airline (UK) are the designated scheduled airlines into South Africa. The skies over South Africa are managed through a series of bilateral agreements with countries that receive SAA flights or whose airlines provide flights to South Africa. SAA has joined with other airline companies in the interest of further growth and development of the airline industry, which has led to an increase in new and more options for visiting travellers.

There are also more air transport operators leading to a rise in the frequency with which visitors come to South Africa. To continue to build strategic alliances with other global players, SAA has become a member of Star Alliance – an internationally recognised group of airlines. This cooperation adds the routes of seventeen other global carriers and offers passengers access to a network of vastly superior proportions. SAA forms part of passenger transport services under tourism-characteristic products in the tables of the TSA.

### 3.7.2 Transport Lekgotla<sup>44</sup>

The Transport Lekgotla attended by the Minister of the Department of Transport (DoT) and other government officials on 18 August 2006, introduced the Transport Programme of Action (PoA), which aims to speed up service delivery in transport. The role that the PoA will play in the tourism sector is to improve the flexibility of the transport system in terms of providing differentiated services to tourists through upgrading intermodal transport. Because the 2010 Soccer World Cup is the biggest tourism event that South Africa will host, this PoA will be aligned around the needs of national and international tourists. Improved public transport will increase the volume of tourism. The PoA will impact the tourism sector in the following two ways:

- Firstly, through opening new flows of people and goods, thus affecting the revenues of different tourism destination; and
- Secondly, through increasing accessibility within cities and towns.

The strategy aims to achieve these benefits through the following objectives:<sup>45</sup>

- **Taxi recapitalisation:** The introduction of new taxi vehicles (minibuses and midibuses) in September 2006;
- **2010 transport strategy:** The Lekgotla reviewed the progress regarding transport preparations for the 2010 Soccer World Cup, and R3,8 billion was approved for the public transport infrastructure programme to leverage other funds available to develop transport infrastructure;
- **Passenger rail plan:** The Lekgotla approved the upgrading of train stations and providing rolling stock of trains to meet 2010 requirements; and
- **Public transport:** The Lekgotla developed a public transport system that integrates all modes of transport including buses, taxis, metered taxis, and rail.

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<sup>44</sup> [www.transport.gov.za](http://www.transport.gov.za)

<sup>45</sup> Source: <http://www.transport.gov.za/search/index.html>

### 3.7.2.1 The role of the Tourism Satellite Account in the Transport Lekgotla

The TSA will assist DoT in measuring three of the four objectives of the Transport Lekgotla, namely, 2010 transport strategy, passenger rail plan and public transport (see section 3.7).

- Table 1 of the TSA (see section 3.1.1) will provide DoT with information on the inbound tourism expenditure for tourists on the following passenger transport services:
  - air transport services (scheduled and non-scheduled air transport services, rental aircraft, etc.);
  - water transport services (cruise ship, coastal and transoceanic water transport services, etc.); and
  - land transport services (train, taxi, minibus, buses, etc.).
- Table 2 of the TSA (see section 3.1.1) will present DoT with information on the domestic tourism expenditure for visitors on the following passenger transport services:
  - air passenger transport services (scheduled and non-scheduled air passenger transport services, rental aircraft, etc.);
  - water passenger transport services (cruise ship, coastal and transoceanic water passenger transport services, etc.); and
  - land passenger transport services (train, taxi, minibus, buses, etc.).
- Table 4 of the TSA (see section 3.1.1) will provide DoT with information on internal tourism consumption on the following passenger transport services:
  - air passenger transport services (scheduled and non-scheduled air transport services, rental aircraft, etc.);
  - water passenger transport services (cruise ship, coastal and transoceanic water passenger transport services, etc.); and
  - land passenger transport services (train, taxi, minibus, buses, rental services of passenger cars with operators, etc.).
- Table 5 of the TSA will provide DoT with information on the production account of the passenger transport industries and other non-tourism industries (see section 3.1.1).
- Table 6 of the TSA (see section 3.1.1) will provide information that will help DoT to measure the total passenger transport services contribution to the tourism GDP of South Africa.
- Table 7 of the TSA (see section 3.1.1) contains information that DoT can use to measure the total number of employment created in the identified passenger transport industries.
- Table 10 of the TSA (see section 3.1.1) provides information from non-monetary indicators that will assist DoT to assess the current state of transport in the tourism sector, to analyse the development of transportation in tourism and to use the information as a supporting tool for implementing this strategy on infrastructure development. The information can also help to measure the extent to which transport infrastructure (especially land, e.g. railways (Gautrain)) can meet the tourist demand during the 2010 Soccer World Cup.
- The TSA will not be able to provide information on taxi recapitalisation.

### 3.8 Tourism Black Economic Empowerment Charter<sup>46</sup>

The Tourism Black Economic Empowerment Charter<sup>47</sup> was launched by DEAT in July 2004. The target period of the Charter is 10 years starting from 2004 to 2014. The main aim of the Charter is to ensure that Tourism Black Economic Empowerment is implemented and monitored effectively during the proposed period. A Charter Council was appointed and they report directly to the Minister of DEAT as well as to the BEE Advisory Council and the DTI.

The main goals of the Charter is:

- To become more globally competitive; and
- To include black African people in the tourism sector.

Government uses the scorecard to align its procurement spending, to set and monitor measurable targets, and to inform government's approach to regulate tourism contributions in South Africa. All companies that met BEE status will benefit from:

- Preferential procurement (companies seek to procure services etc. from suppliers with the best BEE credentials as possible);
- Enterprise development (black owned and empowered SMMEs are eligible);
- Access to government incentives and business support;
- Development of the local tourist market;
- Ownership and partnership opportunities;
- New business linkages;
- Additional skills for the sector;
- New products and opportunities;
- Increased innovation in enterprises and in the industry; and
- Access to international markets that require integrated experience.

#### 3.8.1 The role of Tourism Satellite Account in informing the Tourism Black Economic Empowerment Charter

The TSA will not be able to assist DEAT and DTI in measuring the main goals of the Charter, which is to become globally more competitive and to include black African people in the tourism industries. The information from TSA tables may, however, be useful in implementing this strategy. For example, the TSA will provide information on employment created in identified tourism industries and the contribution of tourism to the GDP of South Africa.

The following information may inform the implementation of the Charter (see section 3.8).

- Table 1 of the TSA: see section 3.1.1;
- Table 2 of the TSA: see section 3.1.1;

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<sup>46</sup> [www.tourismbeecharter.co.za](http://www.tourismbeecharter.co.za)

<sup>47</sup> Hereinafter referred to as 'the Charter'

- Table 4 of the TSA: see section 3.1.1;
- Table 5 of the TSA: see section 3.1.1;
- Table 6 of the TSA: see section 3.1.1;
- Table 7 of the TSA: see section 3.1.1; and
- Table 10 of the TSA: see section 3.1.1.

## Chapter 4 Linking government strategies and the Tourism Satellite Account

The TSA will inform government economic strategies (specifically relating to tourism and the development of tourism in South Africa) in the following ways:

- Central government will be provided with tangible results of the impacts of their investment in tourism. This will help to justify budget allocations by linking budgets to clear strategies, plans and envisaged outcomes<sup>48</sup>;
- It will support strong economic arguments for government support and government investment in tourism. This will contribute towards employment data are important components of the projected growth in tourism-related employment in both absolute terms and as a percentage of total employment in the country;
- It can provide detailed data on visitor consumption and how this consumption is met by domestic supply and imports, integrated within tables derived from supply and use tables<sup>49</sup> (SU-tables) of the national accounts. The information will be used for the development of economic impact of tourism at all levels, also for conducting market-oriented tourism analysis;
- Government will be able to prioritise budgets and focus on aspects of tourism with the greatest potential. It will also help to apply the tourism multiplier model<sup>50</sup> to measure the secondary impact of tourism expenditure on the whole economy. These are important tools to analyse the impact of tourism because gross expenditure figures on tourism-related activities are meaningless for development analysis unless the impact of tourism expenditure on the local economy can be determined;
- The availability of accurate spending figures for the different market segments in tourism would make it easier to calculate the impact of these segments elsewhere in the economy. By basing plans on figures, that were developed in a coherent framework, marketers and strategists could concentrate on those market segments which bring the most benefit to the economy; and
- It is important to note that the TSA forms part of a larger system of tourism statistics (STS). The focus must still remain on the compilation of basic tourism statistics, especially to monitor the impact of policies in the shorter term.

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<sup>48</sup> Source: A consensus building approach for optimising tourism as a sustainable development strategy

<sup>49</sup> SU-tables are one of the outputs of the TSA process. SU-tables which are associated with tourism will feed into the modelling work done at the National Treasury on the potential impact of hosting the 2010 FIFA Soccer World Cup

<sup>50</sup> Computable-General Equilibrium model

Table 2 gives a summary of government strategies and how the TSA can inform those strategies.

**Table 2: Linking government strategies and the Tourism Satellite Account**

Strategy	Goals/objectives	TSA informing government strategies		
		What the TSA can do	What government can do	What the TSA cannot do
1996 White Paper on the Development and Promotion of Tourism in South Africa	<p>Objectives of the 1996 White Paper:</p> <ul style="list-style-type: none"> <li>To generate economic growth and foreign exchange;</li> <li>To create sustainable employment opportunities;</li> <li>To optimise opportunities for SMMEs;</li> <li>To use tourism to aid rural communities;</li> <li>To promote domestic tourism;</li> <li>To encourage tourism growth in Southern Africa;</li> <li>To create conducive tourism investment;</li> <li>To encourage linkages between tourism and other industries; and</li> <li>To lengthen the tourism season.</li> </ul>	<p>The TSA will provide government with the following information (for detailed information see section 3.1.1):</p> <ul style="list-style-type: none"> <li>Table 1: inbound tourism expenditure, by products and categories of visitors;</li> <li>Table 2: domestic tourism expenditure by products, by types of trips and categories of visitors;</li> <li>Table 4: internal tourism consumption by products and types of items;</li> <li>Table 5: production account of tourism industries and other industries;</li> <li>Table 6: domestic supply and internal tourism consumption by products;</li> <li>Table 7: employment in the tourism industries; and</li> <li>Table 10: number of non-monetary indicators.</li> </ul>	<p>Government will be able to:</p> <ul style="list-style-type: none"> <li>Measure the total value of the inbound tourism expenditure, domestic tourism expenditure and internal tourism consumption on the tourism characteristic products, tourism-connected and non-tourism-specific products. It will also measure the length of stay by tourists and visitors within the country;</li> <li>Create a linkage between the tourism sector and other non-tourism industries such as agriculture, manufacturing, construction, etc.;</li> <li>Create opportunities for small entrepreneurs in the tourism sector;</li> <li>Measure tourism contribution to the GDP of South Africa;</li> <li>Measure employment in identified tourism industries; and</li> <li>Measure volume indicators in different establishments.</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>Saving the environment;</li> <li>Promoting awareness and understanding among different cultures;</li> <li>Lighting manufacturing and curios; and</li> <li>Small entrepreneurs.</li> </ul>

**Table 2: Linking government strategies and the Tourism Satellite Account (continued)**

Strategy	Goals/objectives	TSA informing government strategy		
		What the TSA can do	What government can do	What the TSA cannot do
AsgiSA	<p>Objectives of AsgiSA:</p> <ul style="list-style-type: none"> <li>To achieve and sustain an average economic growth rate of 4,5% between 2005 and 2009, and 6,0% between 2010 and 2014; and</li> <li>To reduce poverty and unemployment by 50,0% by the year 2014.</li> </ul> <p>Six broad intervention strategies:</p> <ul style="list-style-type: none"> <li>Macroeconomic issues;</li> <li>Infrastructure programme;</li> <li>Skills and educational initiatives;</li> <li>Second economy; and</li> <li>Public administration.</li> </ul>	<p>The TSA will provide government with information (for detailed information see section 3.2.1) on the following:</p> <ul style="list-style-type: none"> <li>Table 1: inbound tourism expenditure, by products and categories of visitors;</li> <li>Table 2: domestic tourism expenditure by products, by types of trips and categories of visitors;</li> <li>Table 4: internal tourism consumption by products and types of items;</li> <li>Table 5: production account of tourism industries and other industries;</li> <li>Table 6: domestic supply and internal tourism consumption by products;</li> <li>Table 7: employment in the tourism industries; and</li> <li>Table 10: number of non-monetary indicators.</li> </ul>	<p>Government will be able to:</p> <ul style="list-style-type: none"> <li>Measure the total value of the inbound tourism expenditure, domestic tourism expenditure and internal tourism consumption on tourism-characteristic products, tourism-connected and non-tourism-specific products. It will also measure the length of stay by tourists and visitors within the country;</li> <li>Use the production account as a reference for deriving tourism GDP;</li> <li>Measure economic growth and tourism contribution to the GDP;</li> <li>Measure employment created in different tourism industries and training as an approach to skills development; and</li> <li>Implement an infrastructure programme and plan investment on tourism infrastructure based on tourist demand (volume indicator).</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>Poverty reduction;</li> <li>Public administration issues;</li> <li>Education initiatives; and</li> <li>Intervention on second economy.</li> </ul>

**Table 2: Linking government strategies and the Tourism Satellite Account (continued)**

Strategy	Goals/objectives	TSA informing government strategy		
		What the TSA can do	What government can do	What the TSA cannot do
Tourism growth strategy	<p>The main aims of TGS are:</p> <ul style="list-style-type: none"> <li>• Increase GDP growth;</li> <li>• Increase job creation; and</li> <li>• Promote redistribution and transformation.</li> </ul> <p>The objectives of TGS are:</p> <ul style="list-style-type: none"> <li>• Increase tourist volume;</li> <li>• Improve geographic spread;</li> <li>• Increase tourist spend;</li> <li>• Improve seasonality patterns;</li> <li>• Increase length of stay; and</li> <li>• Promote transformation.</li> </ul>	<p>The TSA will provide SAT with information (for detailed information see section 3.3.1) on the following:</p> <ul style="list-style-type: none"> <li>• Table 1: inbound tourism expenditure, by products and categories of visitors;</li> <li>• Table 2: domestic tourism expenditure by products, by types of trips and categories of visitors;</li> <li>• Table 4: internal tourism consumption by products and types of items;</li> <li>• Table 5: production account of tourism industries and other industries;</li> <li>• Table 6: domestic supply and internal tourism consumption by products;</li> <li>• Table 7: employment in the tourism industries; and</li> <li>• Table 10: number of non-monetary indicators.</li> </ul>	<p>SAT will be able to:</p> <ul style="list-style-type: none"> <li>• Measure the total value of the inbound tourism expenditure, domestic tourism expenditure and internal tourism consumption on tourism-characteristic products, tourism-connected and non-tourism-specific products. It will also measure the length of stay by tourists and visitors within the country;</li> <li>• Use the production account as a reference for deriving tourism GDP;</li> <li>• Measure tourism contribution to the GDP;</li> <li>• Measure employment created in different tourism industries; and</li> <li>• Measure the tourist volume indicators.</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>• Redistribution and transformation; and</li> <li>• Improving seasonality patterns.</li> </ul>

**Table 2: Linking government strategies and the Tourism Satellite Account (continued)**

Strategy	Goals/objectives	TSA informing government strategy		What the TSA cannot do
		What the TSA can do	What government can do	
Domestic Tourism Growth Strategy	<p>Objectives of domestic TGS is to increase growth in terms of:</p> <ul style="list-style-type: none"> <li>• Value;</li> <li>• Volume;</li> <li>• Geographic distribution; and</li> <li>• Seasonality and consumption patterns.</li> </ul>	<p>The TSA will provide SAT with information (for detailed information see section 3.4.1) on the following:</p> <ul style="list-style-type: none"> <li>• Table 2: domestic tourism expenditure by products, by types of trips and categories of visitors; and</li> <li>• Table 10: number of non-monetary indicators.</li> </ul>	<p>SAT will be able to:</p> <ul style="list-style-type: none"> <li>• Measure the total value of domestic tourism expenditure on tourism-characteristic products, tourism-connected and non-tourism-specific products; and</li> <li>• To measure the domestic visitor volume indicators.</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>• Regional tourism: TSA only focuses on national tourism and therefore information on geographic distribution and seasonality and consumption patterns will not be included in the TSA.</li> </ul>
TEP	<p>Objectives of the TEP are:</p> <ul style="list-style-type: none"> <li>• Development of business and marketing plans;</li> <li>• Preparation and submission of tenders and proposals to become a supplier;</li> <li>• Training;</li> <li>• Certification and licensing of business; and</li> <li>• Identification of service.</li> </ul>	<p>The TSA will provide DEAT and Business Trust initiatives with information (for detailed information see section 3.6.3) on the following:</p> <ul style="list-style-type: none"> <li>• Table 5: production account of tourism industries and other industries.</li> </ul>	<p>DEAT and Business Trust initiatives will be able to:</p> <ul style="list-style-type: none"> <li>• Identify tourism products and services that need to be supplied by tourism SMMEs.</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>• The certification and licensing of business and information on submission of tenders, developing business and marketing plans, and training.</li> </ul>

**Table 2: Linking government strategies and the Tourism Satellite Account (continued)**

Strategy	Goals/objectives	TSA informing government strategy		What the TSA cannot do
		What the TSA can do	What government can do	
SDI	<p>Objectives of SDI are:</p> <ul style="list-style-type: none"> <li>• To generate sustainable economic growth;</li> <li>• To generate long-term and sustainable employment in the Wild Coast and Lubombo areas;</li> <li>• To maximise the mobilisation of private investment;</li> <li>• To exploit spin-off opportunities from tourism investments (SMMEs); and</li> <li>• To exploit the under-utilised location and economic advantages.</li> </ul>	<p>The TSA will provide DEAT with information (for detailed information see section 3.5.1) on the following:</p> <ul style="list-style-type: none"> <li>• Table 1: inbound tourism expenditure, by products and categories of visitors;</li> <li>• Table 2: domestic tourism expenditure by products, by types of trips and categories of visitors;</li> <li>• Table 4: internal tourism consumption by products and types of items;</li> <li>• Table 5: production account of tourism industries and other industries;</li> <li>• Table 6: domestic supply and internal tourism consumption by products;</li> <li>• Table 7: employment in the tourism industries; and</li> <li>• Table 10: number of non-monetary indicators.</li> </ul>	<p>DEAT will be able to:</p> <ul style="list-style-type: none"> <li>• Measure the total value of inbound tourism expenditure, domestic tourism expenditure and internal tourism consumption on tourism-characteristic products, tourism-connected and non-tourism-specific products. It will also measure the length of stay by tourists and visitors within the country;</li> <li>• Use the production account as a reference for deriving tourism GDP;</li> <li>• Measure tourism contribution to the GDP;</li> <li>• Measure employment created in different tourism industries; and</li> <li>• Measure the tourist volume indicators, especially tourism investment.</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>• Regional tourism due to its focus on national tourism;</li> <li>• Maximising the mobilisation of private investment; and</li> <li>• Exploiting the under-utilised location and economic advantages.</li> </ul>

**Table 2: Linking government strategies and the Tourism Satellite Account (continued)**

Strategy	Goals/objectives	TSA informing government strategy		
		What the TSA can do	What government can do	What the TSA cannot do
Transport Lekgotla	<p>Objectives of Transport Lekgotla are:</p> <ul style="list-style-type: none"> <li>• Taxi recapitalisation;</li> <li>• 2010 transport strategy: transport preparations for the 2010 Soccer World Cup;</li> <li>• Passenger rail plan: The Lekgotla approved the upgrading of train stations; and</li> <li>• Public transport: The Lekgotla developed a public transport system that integrates all modes of transport.</li> </ul>	<p>The TSA will provide the Department of Transport with information (for detailed information see section 3.7.3) on the following:</p> <ul style="list-style-type: none"> <li>• Table 1: inbound tourism expenditure, by products and categories of visitors;</li> <li>• Table 2: domestic tourism expenditure by products, by types of trips and categories of visitors;</li> <li>• Table 4: internal tourism consumption by products and types of items;</li> <li>• Table 5: production account of tourism industries and other industries;</li> <li>• Table 6: domestic supply and internal tourism consumption by products;</li> <li>• Table 7: employment in the tourism industries; and</li> <li>• Table 10: number of non-monetary indicators.</li> </ul>	<p>Government can be able to:</p> <ul style="list-style-type: none"> <li>• Measure the total value of inbound tourism expenditure, domestic tourism expenditure and internal tourism consumption on passenger transport services;</li> <li>• Use the production account as a reference for deriving passenger transport GDP;</li> <li>• Measure passenger transport services contribution to the GDP of South Africa;</li> <li>• Measure the number of jobs created by passenger transport services; and</li> <li>• Measure the extent to which transport infrastructure (especially railways (Gautrain) and public transport system) can meet the tourist demand, (volume indicator).</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>• Taxi recapitalisation (due to the TSA structure and its focus on national tourism).</li> </ul>

**Table 2: Linking government strategies and the Tourism Satellite Account (concluded)**

Strategy	Goals/objectives	TSA informing government strategy		
		What the TSA can do	What government can do	What the TSA cannot do
Tourism BEE Charter	<p>The main goals of Tourism BEE charter are:</p> <ul style="list-style-type: none"> <li>• To become globally competitive; and</li> <li>• To include black people in the tourism industries.</li> </ul>	<p>The TSA may be useful in implementing Tourism BEE Charter. TSA will provide DEAT and the DTI with information on:</p> <ul style="list-style-type: none"> <li>• Table 1: inbound tourism expenditure, by products and categories of visitors;</li> <li>• Table 2: domestic tourism expenditure by products, by types of trips and categories of visitors;</li> <li>• Table 4: internal tourism consumption by products and types of items;</li> <li>• Table 5: production account of tourism industries and other industries;</li> <li>• Table 6: domestic supply and internal tourism consumption by products;</li> <li>• Table 7: employment in the tourism industries; and</li> <li>• Table 10: number of non-monetary indicators.</li> </ul>	<p>Information from TSA will assist DEAT and the DTI to:</p> <ul style="list-style-type: none"> <li>• Measure the total value of inbound tourism expenditure, domestic tourism expenditure and internal tourism consumption on tourism-characteristic products, tourism-connected and non-tourism-specific products. It will also measure the length of stay by tourists and visitors within the country;</li> <li>• Use the production account as a reference for deriving tourism GDP;</li> <li>• Measure tourism contribution to the GDP;</li> <li>• Measure employment created in different tourism industries; and</li> <li>• Measure the tourist volume indicators.</li> </ul>	<p>The TSA will not be able to provide information on:</p> <ul style="list-style-type: none"> <li>• Global competitiveness of tourism; and</li> <li>• Black ownership in tourism industries (since TSA is focusing on the national tourism and not on the population group).</li> </ul>

## Chapter 5 Conclusion

The information from the TSA will provide specific, measurable indicators of the achievements of tourism in South Africa. Government can address some of the fundamental barriers to tourism growth by looking at how to expand and modernise infrastructure, apply taxes fairly and invest in human resource development.

TSA's can be used to monitor shifts in tourism demand, identifying evolving preferences as well as the distribution of these preferences across types of tourists, their characteristics, and locations. The analysis of tourism provided by the TSA will provide vital information required to assist government in policy-formulation, decision-making and strategic planning to boost tourism in the country. It will also provide the means for measuring growth in tourism, because it collects and inter-relates statistics describing all significant statistical aspects of tourism. The information produced from the TSA will ensure that tourism development in the country takes place in a sustainable manner.

The overall mission of the government tourism development strategy included in the new tourism strategies will be achieved through the following key objectives<sup>51</sup>:

- Positioning tourism as a national priority;
- Enhancing South Africa's competitiveness as a tourist destination;
- Improving and expanding product development;
- Creating a world-class tourism infrastructure; and
- Implementing effective marketing plans and programmes.

In conclusion:

- A TSA should be integrated at both policy and action levels among the various levels of government departments involved in tourism;
- The Domestic Tourism Survey (DTS), General Household Survey (GHS), upcoming Tourism Specific Household Survey, Income and Expenditure Survey (IES), Economic Activity Survey (EAS) and Large Sample Survey (LSS) of accommodation, SU-tables, conducted by SAT and Stats SA are major data sources for the compilation of the South African TSA. These surveys are conducted annually (and some periodically) and their coverage is only on national and not on regional basis. The regional TSA in South Africa cannot be conducted any time soon due to a lack of regional data. In order for South Africa to conduct the regional TSA, the above-mentioned data need to be compiled on a regional level as well. This imply that detailed SU-tables need to be compiled at a regional level;

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<sup>51</sup> Tourism Growth Strategy 2002

- Information on tourism industries forms a vital part of SMMEs. The compilation of such information in the TSA tables will help to determine how much value each aspect of tourism SMMEs is contributing to tourism consumption<sup>52</sup>. It is important to recognise the potential that SMMEs have in creating an entry point for people setting up small business for the first time, which will promote employment. Data on SMMEs can be sourced from statutory bodies such as the Tourism Business Council of South Africa (TBCSA) and the TEP. With the soon-to-come seminar on tourism accommodation hosted by SAT in preparation for 2010 Soccer World Cup, this will pave the way for SMME participation;
- Data from the TSA can be used by government to provide quantitative estimates for measuring the effects of policies or of social developments in tourism, e.g. trade liberalisation, exchange rates (change in visitor spending patterns), changes in leisure and travel behaviour, etc.;
- By applying a number of economic tools such as the TSA, government is able to obtain a large array of economic information on tourism, which can be used to make informed decisions. In assessing this information, policy-makers have to determine not just whether jobs and wealth are created, but also how the benefits are distributed, what costs result from the development process, and whether the benefits of tourism outweigh economic, social and cultural costs;
- Continued buy-in from all the key stakeholders must be secured and user educational roadshows can be conducted. The promotion of the TSA can be in the form of seminars involving both public and private institutions. This will enhance public-private sector collaboration; and
- The TSA will not be able to inform the policy-maker on tourism transformation and redistribution. The discussion document 'Country experience in the compilation of Tourism Satellite Accounts' (D0405.4) shows that no country has collected information on population groups to compile a TSA (for more information visit the Stats SA website on: [www.statssa.gov.za](http://www.statssa.gov.za)). Information on population groups, transformation and redistribution will not be available in the near future.

It is important to note that while the TSA would be very useful in informing, monitoring and evaluating government policies and strategies, it should not be looked at in isolation, as the TSA must form part of a broader STS. Any comments or suggestions may be forwarded by 30 November 2007 to Membrey Mashiane at:

[MembreyM@statssa.gov.za](mailto:MembreyM@statssa.gov.za) by 30 November 2007.

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<sup>52</sup> TEP, as the institution dealing with SMMEs in tourism, has been requested to provide information. TEP stated that no information will be made available unless a formal letter to that effect is written

## Glossary

<b>Country of residence</b>	If a person resides (or intends to reside) for more than one year in a given country and has there his/her centre of economic interest (e.g. his/her major source of income), he/she is considered a resident of that country.
<b>Domestic tourism</b>	The tourism of resident visitors within the economic territory of the country of reference.
<b>Domestic tourism consumption</b>	Comprises the consumption of resident visitors within the economic territory of the country of reference.
<b>Domestic tourist</b>	A resident visitor who visits within the economic territory of the country of reference.
<b>Domestic visitor</b>	Visitors, whose country of residence is the country visited. They may be nationals of this country or foreigners.
<b>Expenditure</b>	The value of the amounts that buyers pay or agree to pay to sellers in exchange for the goods or services that sellers provide to them or to other institutional units designated by the buyers.
<b>Establishment</b>	An enterprise or part of an enterprise, which is situated in one location and engaged in mainly one type of productive activity, which is the principal activity.
<b>Gross Domestic Product</b>	The total value of goods and services produced within the geographic boundaries of a country for a specified period of time.
<b>Gross fixed capital formation</b>	The total value of a producer's acquisitions, less disposals, of fixed assets during the accounting period plus certain additions to the value of non-produced assets realised by the productive activity of institutional units. Fixed assets are tangible or intangible assets produced as outputs from processes of production that are themselves used repeatedly or continuously in other processes of production for more than one year.
<b>Household final consumption expenditure</b>	Includes all consumption expenditure made by households from their own cash resources (including all income in cash received), as well as all the counterpart of income in kind (except social transfers in kind) that those households might have received, such as remuneration in kind and other transfers in kind. It also includes the value of all consumption of output for own final use, such as those provided by second homes on own account used for tourism purposes or what it can have received through barter transactions.
<b>Inbound tourism consumption</b>	Comprises the consumption of non-resident visitors within the economic territory of the country of reference and/or that provided by residents.
<b>Inbound tourist</b>	A non-resident visitor who visits within the economic territory of the country of reference.

<b>Industry</b>	A group of establishments engaged in the same, or similar, kinds of economic activity.
<b>Internal tourism</b>	The tourism of visitors, both resident and non-resident, within the economic territory of the country of residence. It is a combination of domestic and inbound tourism.
<b>Internal tourism consumption</b>	The consumption of both resident and non-resident visitors within the economic territory of the country of reference and/or that provided by residents.
<b>International tourist</b>	An international visitor who stays at least one night in collective or private accommodation in the country visited.
<b>International traveller</b>	Any person on a trip between two or more localities in different countries.
<b>International visitor</b>	Any person who travels to a country other than that in which he/she has his/her residence but outside his/her usual environment for a period that is less than 12 months and whose main purpose of the visit is other than the exercise of an activity remunerated from within the country visited.
<b>National tourism</b>	National tourism is the combination of domestic and outbound tourism.
<b>National tourism consumption</b>	The consumption of both resident visitors within and outside the economic territory of the country of reference.
<b>Occupancy rate</b>	The number of stay unit nights sold, divided by the product of the number of stay units nights available and the number of days in the survey period, expressed as a percentage.
<b>Outbound tourism</b>	The tourism of resident visitors outside the economic territory of the country of reference.
<b>Outbound tourism consumption</b>	Comprises the consumption of resident visitors outside the economic territory of the country of reference and provided by non-residents.
<b>Overseas traveller (tourism and migration)</b>	A foreign traveller visiting South Africa (SA), excluding travellers from mainland Africa and from 'unspecified' countries.
<b>Residence</b>	An institutional unit's residence is the location where its centre of principal economic interest can be found. The residence of a household is that of all its members.
<b>Same-day visitor</b>	A visitor who visits a place for less than one night.
<b>Tourism</b>	The activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.

<b>Tourism-characteristic activity</b>	Those productive activities that have tourism-characteristic products as their principal output.
<b>Tourism-characteristic industry</b>	A group of establishments whose principal productive activity is a tourism-characteristic activity.
<b>Tourism-characteristic products</b>	Products which, in the absence of visitors, in most countries would probably cease to exist in meaningful quantity of for which the level of consumption would be significantly reduced and for which it seems possible to obtain statistical information.
<b>Tourism consumption</b>	The total consumption expenditure made by a visitor or on behalf of a visitor for and during his/her trip and stay at a destination.
<b>Tourism-connected activities</b>	Those productive activities that have tourism-connected products as their principal output.
<b>Tourism gross domestic product</b>	The gross domestic product generated in the economy by the tourism industries and other industries in response to tourism internal consumption.
<b>Tourism gross fixed capital formation</b>	Is the sum of the gross fixed capital formation in specific tourism fixed produced assets by all economic productive activities and the gross fixed capital formation of tourism industries in non-specific tourism fixed assets.
<b>Tourism sector</b>	All establishments whose principal productive activity is a tourism-characteristic activity, i.e. the sum of all tourism-characteristic activities.
<b>Tourist</b>	A visitor who stays at least one night in the place visited.
<b>Value added of the tourism industries</b>	Sums the value added of all characteristic producers regardless of the buyers of their output; it excludes non-characteristic producers.
<b>Visitor</b>	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
<b>Visitor consumption</b>	The total consumption expenditure made by a visitor or on behalf of a visitor for or during his/her trip and stay at the destination.
<b>Visitors' expenditures</b>	Are traditionally used in the analysis of the tourism economy. They include expenditures on goods and services consumed by visitors for and during their trips and stay at destination. It corresponds with the monetary transactions component of tourism consumption.

## Annexures

### Annexure 1: List of tourism characteristic products and grouping by main categories according to CPC version 2<sup>53</sup>

#### 1. Accommodation services

63111	Room or unit accommodation for visitors, with daily housekeeping services
63112	Room or unit accommodation for visitors, without daily housekeeping services
63113	Room or unit accommodation for visitors in timeshare properties
63114	Accommodation services for visitors, in rooms with multiple occupancy
63120	Campsite services
63130	Recreational vacation camp services
63210	Room or unit accommodation services for students in student residences
63290	All other room or unit accommodation services
72111	Renting or leasing services involving own or leased residential property
72123	Trade services of timeshare property
72211	Residential property management services on a fee or contract basis except of timeshare ownership properties
72213	Timeshare (ownership type) property management services on a fee or contract basis
72221	Residential building sales on a fee or contract basis except of timeshare ownership properties
72223	Sale of timeshare properties on a fee or contract basis

#### 2. Food and beverage serving services

63310	Meal-serving services with full restaurant services
63320	Meal-serving services with limited services
63399	Other food-serving services
63400	Beverage-serving services

#### 3. Railway passenger transport services

64131	Sightseeing services by rail
64210	Interurban railway transport services of passengers

<sup>53</sup> Provisional list (IRTS provisional draft).

#### 4. Road passenger transport services

64115	Taxi services
64116	Rental services of passenger cars with operator
64117	Road transport services of passengers by man- or animal – drawn vehicles
64118	Non – scheduled local bus and coach services
64119	Other land transportation services of passengers, n.e.c.
64132	Sightseeing services by land, except rail
64221	Interurban scheduled road transport services of passengers
64222	Interurban special – purpose scheduled road transport services of passengers
64223	Non – scheduled long distance bus and coach services

#### 5. Water passenger transport services

64121	Inland water transport services of passengers by ferries
64122	Inland water transport services of passengers on cruises
64129	All other inland water transport services of passengers
64133	Sightseeing services by water
64231	Coastal and transoceanic water transport services of passengers by ferries
64232	Coastal and transoceanic water transport services of passengers on cruise ships
64239	All other coastal and transoceanic water transport services of passengers

#### 6. Air passenger transport services

64134	Sightseeing services by air
64241	Domestic scheduled air transport services of passengers
64242	Domestic non - scheduled air transport services of passengers
64243	International scheduled air transport services of passengers
64244	International non - scheduled air transport services of passengers
64250	Space transport services of passengers

#### 7. Transport equipment rental

73111	Leasing or rental services concerning cars and light vans without operator
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## 8. Travel agencies and other reservation services

85511	Reservation services for air transport
85512	Reservation services for rail transport
85513	Reservation services for bus transport
85514	Reservation services for vehicle rental
85519	Other transportation arrangement and reservation services, n.e.c.
85521	Reservation services for accommodation
85522	Timeshare exchange services
85523	Reservation services for cruises
85524	Reservation services for package tours
85539	Reservation services for event tickets and other entertainment and recreational services
85540	Tour operator services
85550	Tourist guide services
85562	Visitor information services

## 5. Cultural services

96220	Performing arts event production and presentation services
96310	Services of performing artists
96411	Museum services except for historical sites and buildings
96412	Preservation services of historical sites and buildings
96421	Botanical and zoological garden services
96422	Nature reserve services including wildlife preservation services

## 6. Recreation and other entertainment services

96520	Sports and recreational sports facility operations services
96590	Other sports and recreational sports services
96910	Amusement park and similar attraction services
96929	Other gambling and betting services
96930	Coin-operated amusement machine services
96990	Other recreation and amusement services, n.e.c.

### 11. Tourism characteristics goods

	Tourism single-purpose consumer durables
	Souvenirs
	Handicrafts
	Other tourism goods

Annexures 2–11 show the 10 tables of the TSA.

**Annexure 2: Table 1 – Inbound tourism expenditure, by products and categories of visitors (net valuation)**

Products	Total inbound tourism expenditure		
	Tourists (1,1)	Same - day visitors (1,2)	Total visitors (1,3) = (1,1) + (1,2)
<b>A. Specific products</b>			
<b>A.1 Characteristic products</b>			
<b>1 - Accommodation services</b>			
1.1 - Hotels and other accommodation services for visitors other than 1.2		x	
1.2 - Accommodation services associated with all forms of vacation home ownership		x	
<b>2 - Restaurant and similar</b>		x	
<b>3 - Passenger transport services</b>			
3.1 - Railway passenger transportation services			
3.2 - Road passenger transportation services			
3.3 - Water passenger transportation services			
3.4 - Air passenger transportation services			
3.5 - Transport equipment rental			
<b>4 - Travel agencies and similar</b>			
4.1 - Reservation services provided by travel agencies (1)			
4.2 - Reservation services provided by tour operators (2)			
4.3 - Other reservation services			
<b>5 - Cultural services</b>			
<b>6 - Sports and recreational services</b>			
<b>7 - Tourism-characteristic goods (3)</b>			
<b>8 - Other country-specific tourism-characteristic services</b>			
<b>A.2 Connected products</b>			
Services			
<b>B. Non-specific products</b>			
Services			
Goods			
<b>Total</b>			
	number of trips		
	number of overnights		

X does not apply

- (1) Corresponds to the services charged of the travel agencies
- (2) Corresponds to the services charged of the tour operators
- (3) Excluded valuable and tourism single purpose consumer durables goods which value exceeds the custom threshold, and that Balance of Payment statistics and National Accounts include as imports or exports of goods under general merchandise trade

**Annexure 3: Table 2 – Domestic tourism expenditure by products, by types of trips and categories of visitors (net valuation)**

Products	Resident visitors						Total domestic tourism expenditure		
	on a domestic trip			on an international trip (expenditure prior to leaving the country of reference)			Tourists (2.7) = (2.1) + (2.4)	Same-day visitors (2.8) = (2.2) + (2.5)	Total visitors (2.9) = (2.3) + (2.6)
	Tourists (2.1)	Same-day visitors (2.2)	Total visitors (2.3) = (2.1) + (2.2)	Tourists (2.4)	Same-day visitors (2.5)	Total visitors (2.6) = (2.4) + (2.5)			
<b>A. Specific products</b>									
<b>A.1 Characteristic products</b>									
<b>1 - Accommodation services</b>		x			x		x		
1.1 - Hotels and other accommodation services for visitors other than 1.2		x			x		x		
1.2 - Accommodation services associated with all forms of vacation home ownership		x			x		x		
<b>2 - Restaurant and similar</b>									
<b>3 - Passenger transport services</b>									
3.1 - Railway passenger transportation services									
3.2 - Road passenger transportation services									
3.3 - Water passenger transportation services									
3.4 - Air passenger transportation services									
3.5 - Transport equipment rental									
<b>4 - Travel agencies and similar</b>									
4.1 - Reservation services provided by travel agencies (1)									
4.2 - Reservation services provided by tour operators (2)									
4.3 - Other reservation services									
<b>5 - Cultural services</b>									
<b>6 - Sports and recreational services</b>									
<b>7 - Tourism-characteristic goods (3)</b>									
<b>8 - Other country-specific tourism-characteristic services</b>									
<b>A.2 Connected products</b>									
Services									
<b>B. Non-specific products</b>									
Services									
Goods									
<b>Total</b>									
number of trips									
number of overnights									

X does not apply

- (1) Corresponds to the services charged of the travel agencies
- (2) Corresponds to the services charged of the tour operators
- (3) Excluded valuable and tourism single purpose consumer durables goods which value exceeds the custom threshold, and that Balance of Payment statistics and National Accounts include as imports or exports of goods under general merchandise trade

**Annexure 4: Table 3 – Outbound tourism expenditure by products, by types of trips and categories of visitors (net valuation)**

Products	Resident visitors						Total outbound tourism expenditure		
	in other economy			on an international trip (expenditure prior to leaving the country of reference) (4)			Tourists (3.4) = (3.1) + (2.4)	Same-day visitors (3.5) = (3.2) + (2.5)	Total visitors (3.6) = (3.4) + (3.5)
	Tourists (3.1)	Same-day visitors (3.2)	Total visitors (3.3) = (3.1) + (3.2)	Tourists (2.4)	Same-day visitors (2.5)	Total visitors (2.6) = (2.4) + (2.5)			
<b>A. Specific products</b>									
<b>A.1 Characteristic products</b>									
<b>1 - Accommodation services</b>		X			X			X	
1.1 - Hotels and other accommodation services for visitors other than 1.2		X			X			X	
1.2 - Accommodation services associated with all forms of vacation home ownership		X			X			X	
<b>2 - Restaurant and similar</b>									
<b>3 - Passenger transport services</b>									
3.1 - Railway passenger transportation services									
3.2 - Road passenger transportation services									
3.3 - Water passenger transportation services									
3.4 - Air passenger transportation services									
3.5 - Transport equipment rental									
<b>4 - Travel agencies and similar</b>									
4.1 - Reservation services provided by travel agencies (1)									
4.2 - Reservation services provided by tour operators (2)									
4.3 - Other reservation services									
<b>5 - Cultural services</b>									
<b>6 - Sports and recreational services</b>									
<b>7 - Tourism-characteristic goods (3)</b>									
<b>8 - Other country-specific tourism-characteristic services</b>									
<b>A.2 Connected products</b>									
Services									
<b>B. Non-specific products</b>									
Services									
Goods									
<b>Total</b>									
number of trips									
number of overnights									

X does not apply

- (1) Corresponds to the services charged of the travel agencies
- (2) Corresponds to the services charged of the tour operators
- (3) Excluded valuable and tourism single purpose consumer durables goods which value exceeds the custom threshold, and that Balance of Payment statistics and National Accounts include as imports or exports of goods under general merchandise trade
- (4) These columns are identical to those of Table 2

**Annexure 5: Table 4 – Internal tourism consumption by products and types of items (net valuation)**

	Internal tourism expenditure			Other components of tourism consumption				Internal tourism consumption	
	Inbound tourism expenditure	Domestic tourism expenditure	Internal tourism expenditure	Services associated to vacation accommodation on own account	Social transfers in kind	Other imputations	Tourism single purpose consumer durables purchased outside the context of a trip or before a trip		Total
Products	(1.3)	(2.9)	(4.1) = (1.3) + (2.9)	(4.2)	(4.3)	(4.4)	(4.5)	(4.6) = (4.2) + (4.3) + (4.4) + (4.5)	(4.7) = (4.1) + (4.6)
<b>A. Specific products</b>									
<b>A.1 Characteristic products</b>									
<b>1 - Accommodation services</b>									
1.1 - Hotels and other accommodation services for visitors other than 1.2									
1.2 - Accommodation services associated with all forms of vacation home ownership									
1.3 - Other accommodation services on own account									
<b>2 - Restaurant and similar</b>									
<b>3 - Passenger transport services</b>									
3.1 - Railway passenger transportation services									
3.2 - Road passenger transportation services									
3.3 - Water passengers transportation services									
3.4 - Air passenger transportation services									
3.5 - Transport equipment rental									
<b>4 - Travel agencies and similar</b>									
4.1 - Reservation services provided by travel agencies (1)									
4.2 - Reservation services provided by tour operators (2)									
4.3 - Other reservation services									
<b>5 - Cultural services</b>									
<b>6 - Sports and recreational services</b>									
<b>7 - Tourism-characteristic goods (3)</b>									
<b>8 - Other country-specific tourism-characteristic services</b>									
<b>A.2 Connected products</b>									
Services									
<b>B. Non-specific products</b>									
Services									
Goods									
<b>Total</b>									

- (1) Corresponds to the services charged of the travel agencies
- (2) Corresponds to the services charged of the tour operators
- (3) Excluded valuable and tourism single purpose consumer durables goods which value exceeds the custom threshold, and that Balance of Payment statistics and National Accounts include as imports or exports of goods under general merchandise trade

**Annexure 6: Table 5 – Production accounts of tourism industries and other industries (net valuation)**

	Tourism industries												12 - Other country-specific tourism-characteristic goods	Total tourism industries	Other non-tourism industries	Total output of domestic producers (at basic prices)	
	1 - a. Accommodation services in 55 (5.1a)	1 - b. Accommodation services in 68 (5.1b)	2 - Restaurants and similar (5.2)	3 - Railway passenger transport (5.3)	4 - Road passenger transport (5.4)	5 - Water passenger transport (5.5)	6 - Air passenger transport (5.6)	7 - Transport equipment rental (5.7)	8 - Travel agencies and similar (5.8)	9 - Cultural services (5.9)	10 - Sports and recreational services (5.10)	11 - Trade of tourism-characteristic goods (5.11)					
<b>Products</b>																	
<b>A. Specific products</b>																	
<b>A.1 Characteristic products</b>																	
<b>1 - Accommodation services</b>																	
1.1 - Hotels and other accommodation services for visitors other than 1.2																	
1.2 - Accommodation services associated with all forms of vacation home ownership																	
1.3 - Other accommodation services on own account																	
<b>2 - Restaurant and similar</b>																	
<b>3 - Passenger transport services</b>																	
3.1 - Railway passenger transportation services																	
3.2 - Road passenger transportation services																	
3.3 - Water passenger transportation services																	
3.4 - Air passenger transportation services																	
3.5 - Transport equipment rental																	
<b>4 - Travel agencies and similar</b>																	
4.1 - Reservation services provided by travel agencies (1)																	
4.2 - Reservation services provided by tour operators (2)																	
4.3 - Other reservation services																	
<b>5 - Cultural services</b>																	
<b>6 - Sports and recreational services</b>																	
<b>7 - Tourism-characteristic goods (3)</b>																	
<b>8 - Other country-specific tourism-characteristic services</b>																	
<b>A.2 Connected products</b>																	
Services																	
<b>B. Nonspecific products</b>																	
Services																	
Goods																	
<b>TOTAL output (at basic prices)</b>																	
1. Agriculture, forestry and fishery products																X	X
2. Ores and minerals; electricity, gas and water																X	X
3. Food products; beverage and tobacco; textiles; apparel and leather products																X	X
4. Metal products; machinery and equipment																X	X
5. Construction and construction services																X	X
6. Distributive trade services; lodging; food and beverage services; transport services and utilities distribution services																X	X
7. Financial and related services; real estate services; and rental and leasing services																X	X
8. Business and production services																X	X
9. Community, social and personal services																X	X
<b>Total intermediate consumption (at purchasers prices)</b>																	
<b>Total gross value added of industries (at basic prices)</b>																	
Compensation of employees																	
Other taxes less subsidies on production																	
Gross mixed income																	
Gross operating surplus																	

X does not apply

- (1) Corresponds to the services charged of the travel agencies
- (2) Corresponds to the services charged of the tour operators
- (3) Excluded valuable and tourism single purpose consumer durables goods which value exceeds the custom threshold, and that Balance of Payment statistics and National Accounts include as imports or exports of goods under general merchandise trade



**Annexure 8: Table 7 – Employment in the tourism industries**

Tourism industries	Number of establishments	Number of jobs			Status in employment						Number of hours worked		
		Total			Employees			Other			Total		
		Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
1 - a. Accommodation services in 55													
1 - b. Accommodation services in 68													
2 - Restaurant and similar		x	x	x	x	x	x	x	x	x	x	x	x
3 - Railway passenger transport													
4 - Road passenger transport													
5 - Water passenger transport													
6 - Air passenger transport													
7 - Transport equipment rental													
8 - Travel agencies and similar													
9 - Cultural services													
10 - Sports and recreational services													
11 - Retail trade of tourism-characteristic goods													
12 - Other country-specific tourism-characteristic activities													
<b>Total</b>													

X does not apply

**Annexure 9: Table 8 – Tourism gross fixed capital formation of tourism industries and other industries**

	Tourism industries												Total tourism industries	Other industries			Total tourism gross fixed capital formation of tourism industries and others	
	1 - a. Accommodation services in 55	1 - b. Accommodation services in 68	2 - Restaurant and similar	3 - Railway passenger transport	4 - Road passenger transport	5 - Water passenger transport	6 - Air passenger transport	7 - Transport equipment rental	8 - Travel agencies and similar	9 - Cultural services	10 - Sports and recreational services	11 - Trade of tourism-characteristic goods		12 - Other country specific characteristic activities	Public administration	Others		Total
<b>A. Produced non-financial assets</b>																		
<b>A1. Tangible fixed assets</b>																		
1. Tourism accommodation		x																
1.1 Short accommodation for visitors		x																
1.2 Vacation homes (full property)																		
1.3 Other forms of vacation home property																		
2. Other buildings and structures		x																
2.1 Restaurants and similar buildings		x																
2.2 Construction of infrastructure for passenger transport by road, rail, water and air		x																
2.3 Buildings for cultural services and similar		x																
2.4 Construction for sport, recreation and entertainment		x																
2.5 Other construction and structures		x																
3. Passenger transport equipment		x																
3.1 Road and rail		x																
3.2 Water		x																
3.3 Air		x																
4. Machinery and equipment		x															(1)	(1)
<b>A.2 Intangible fixed assets</b>		x															(1)	(1)
<b>B. Improvement of land used for tourism purposes</b>																		
<b>Total</b>																		
Memorandum items:																		
<b>C. Non-produced non-financial assets</b>		x																
1. Tangible non-produced assets		x																
2. Intangible non-produced assets		x																
<b>Total</b>		x																

X does not apply

(1) Only that which is for tourism purposes.

**Annexure 10: Table 9 – Tourism collective consumption by CPC products and levels of government**

Products	National level	Regional (state) level	Local level	Total tourism collective consumption	Memo (*) Intermediate consumption by the tourism industries
	(9.1)	(9.2)	(9.3)	.4) = (9.1)+(9.2)+(9.3)	
85561 Tourism promotion services;					
85562 Visitor information services;					
83700 Market research and public opinion polling services;					
91135 Administrative services related to the distributive and catering trade, hotels and restaurants;					
91136** Administrative services related to tourism affairs;					
91260** Police and fire protection services;					
92219** Other education and training;					
92920** Educational support services					
Other services					
<b>Total</b>					

X does not apply

(\*) This column reflects the expenditure by the tourism industries promotion or other services related to the products described, when relevant.

\*\* Corresponds only partly to CPC code.

### Annexure 11: Table 10 – Non-monetary indicators

a. Number of trips and overnights by type of tourism and categories of visitors

	Inbound tourism (*)			Domestic tourism			Outbound tourism		
	Same-day visitors	Tourists	Total visitors	Same-day visitors	Tourists	Total visitors	Same-day visitors	Tourists	Total visitors
Number of trips or visits (*)									
Number of overnights									

\* For trips involving visits to the economy and outside, count the visits. Otherwise, use the trip as a unit

b. Inbound tourism: number of arrivals and overnights by modes of transport

	Number of arrivals	Number of overnights
1. Air		
1.1 Scheduled flights		
1.2 Unscheduled flights		
1.3 Private aircraft		
1.4 Other services		
2. Waterway		
2.1 Passenger lines and ferries		
2.2 Cruise ships		
2.3 Yacht		
2.4 Other		
3. Land		
3.1 Railway		
3.2 Motor coach or bus and other public road transportation		
3.3 Vehicle rental with driver		
(i) taxis, limousines and rental private vehicle with driver		
(ii) rental or man or animal drawn vehicle		
3.4 Owned private vehicle		
3.5 Vehicle rental without operator (up to 8 pers.)		
3.6 Other modes of land transport (horseback, bicycle, motorcycles, etc.)		
3.7 On foot		
<b>Total</b>		

(\*) in the case of inbound tourism, the variable would be “arrivals”

**Annexure 11: Table 10 – Non-monetary indicators (concluded)**

*c. Number of establishments and capacity by forms of accommodation*

	Accommodation services in 55		Accommodation services in 68	
	Hotels and similar	Others	Hotels and similar	Others
Number of establishments				
Capacity (rooms)				
Capacity utilisation (rooms)				
Capacity utilisation (beds)				

*d. Number of establishments in tourism industries classified to average number of employed persons*

	1 - 4	5 - 9	10 - 19	20 - 49	50 - 99	100 - 249	250 - 499	500 - 999	> 1000	Total
<b>Tourism-characteristic activities</b>										
1 - a. Accommodation services in 55										
1 - b. Accommodation services in 68										
2 - Restaurant and similar										
3 - Railway passenger transport										
4 - Road passenger transport										
5 - Water passenger transport										
6 - Air passenger transport										
7 - Transport equipment rental										
8 - Travel agencies and similar										
9 - Cultural services										
10 - Sports and recreational services										
11 - Retail trade of tourism-characteristic goods										
12 - Other country-specific tourism-characteristic activities										
<b>Total</b>										

(8) In the case of inbound tourism, the variable would be 'arrivals'

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