

National Accounts



Satellite Accounts

Tourism Satellite Account for South Africa, final 2013 and
provisional 2014 and 2015

Report No.: 04-05-07
December 2016

THE SOUTH AFRICA I KNOW, THE HOME I UNDERSTAND

Tourism Satellite Account for South Africa, final 2013 and provisional 2014 and 2015

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Abbreviations

AFS	Annual Financial Statistics
AsgiSA	Accelerated and Shared Growth Initiative for South Africa
BoP	Balance of Payments
CPC	Central Product Classification
EAS	Economic Activity Survey
GDP	Gross domestic product
GHS	General Household Survey
GVA	Gross value added
GDVATI	Gross direct value added of the tourism industries
IES	Income and Expenditure Survey
ISIC	International Standard Industrial Classification of all Economic Activities
LFS	Labour Force Survey
LSS	Large Sample Survey
QLFS	Quarterly Labour Force Survey
SARB	South African Reserve Bank
SAT	South African Tourism
SIC	Standard Industrial Classification of all Economic Activities
SICTA	Standard International Classification of Tourism Activities
SNA	System of National Accounts
Stats SA	Statistics South Africa
STS	System of Tourism Statistics
SU-tables	Supply and Use Tables
TDGDP	Tourism direct gross domestic product
TDGVA	Tourism direct gross value added
TFDS	Tourism foreign direct spend
TSA	Tourism Satellite Account
TSA: RMF	Tourism Satellite Account: Recommended Methodological Framework
UN	United Nations
UNSD	United Nations Statistical Division
UNWTO	United Nations World Tourism Organization
VA	Value added
VAT	Value added tax

Preface

The Tourism Satellite Account (TSA), final 2013 and provisional 2014 and 2015 covers updated and new provisional figures for the reference years 2014 and 2015 as well as the final results for 2013. It provides an overview of the role that tourism plays in South Africa and provides information on tourism's contribution to the South African economy in terms of expenditure and employment.

The TSA for South Africa is compiled and published by Statistics South Africa (Stats SA) according to a framework (Tourism Satellite Account: Recommended Methodological Framework [TSA: RMF]) developed by the United Nations World Tourism Organization (UNWTO). The TSA is one element of a System of Tourism Statistics (STS) that provides information for the understanding and monitoring of the impact of tourism on the South African economy over time. The other elements of the STS for South Africa include the surveys of international tourists and domestic visitors, visitor arrival statistics, tourist accommodation, and food and beverage statistics.

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December 2016

Key findings

Key findings of the Tourism Satellite Account for South Africa for 2011 to 2015:

	2011(f)	2012(f)	2013(f)	2014(p)	2015(p)
Inbound tourism expenditure (R million)	71 747	85 423	94 183	106 728	108 760
Annual growth in inbound tourism expenditure (%)	3,3	19,1	10,3	13,3	1,9
Outbound tourism expenditure (R million)	60 545	58 588	62 596	68 417	72 712
Annual growth in outbound tourism expenditure (%)	1,8	-3,2	6,8	9,3	6,3
Tourism trade balance with the rest of the world (R million)	11 202	26 835	31 587	38 311	36 048
Annual growth in the tourism trade balance with the rest of the world (%)	12,4	139,5	17,7	21,3	-5,9
Domestic tourism expenditure (R million)	102 824	114 511	124 137	134 440	140 931
Annual growth in domestic tourism expenditure (%)	5,1	11,4	8,4	8,3	4,8
Internal tourism expenditure (R million)	174 571	199 934	218 320	241 168	249 691
Annual growth in internal tourism expenditure (%)	4,4	14,5	9,2	10,5	3,5
Tourism direct gross value added (TDGVA) (R million)	77 364	86 646	95 469	105 789	109 605
Tourism direct gross value added (TDGVA) (% of GVA)	2,8	2,9	3,0	3,1	3,1
Tourism direct gross domestic product (TDGDP) (R million)	83 962	93 750	103 349	114 419	118 928
Tourism direct gross domestic product (TDGDP) (% of GDP)	2,8	2,9	2,9	3,0	3,0
Persons directly engaged in producing goods and services purchased by visitors (number)	622 929	646 390	657 766	679 560	711 746
Persons directly engaged in producing goods and services purchased by visitors (% of total)	4,4	4,5	4,4	4,5	4,5

(f) Final

(p) Preliminary

Tourism direct gross value added (TDGVA) increased from R105 789 million in 2014 to R109 605 million in 2015 (3,6%). Tourism direct gross domestic product (TDGDP) increased from R114 419 million in 2014 to R118 928 million in 2015 (3,9%).

The tourism sector directly employed 711 746 persons in 2015, an increase of 4,7% or 32 186 employees compared with 2014. Tourism's share of total employment was unchanged from 2014 (4,5%) to 2015 (4,5%).

The year 2015 saw 13 951 901 non-resident visitors to South Africa compared with 14 529 542 non-resident visitors in 2014 and 14 317 908 non-resident visitors in 2013. Of the 13 951 901 non-resident visitors in 2015, 5 048 128 were same-day visitors and 8 903 773 were tourists.

For tourism consumption (expenditure), the trends in 2015 (compared with 2014) were:

- Tourism exports (inbound tourism expenditure) increased by 1,9 % to R108 760 million compared with the 13,3 % growth in the previous period;
- Tourism imports (outbound tourism expenditure) increased by 6,3% to R72 712 million (9,3% in the previous period);
- Domestic tourism expenditure increased by 4,8% to R140 931 million; and
- Internal tourism expenditure increased by 3,5% to R249 691 million.

Inbound tourism expenditure totalling R108 760 million was recorded in 2015. The main expenditure items were 'non-specific products' (25,3%), 'accommodation for visitors' (15,0%), 'connected products' (14,9%) and 'road passenger transport services' (12,8%). Domestic tourism expenditure totalling R140 931 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2015. The main expenditure items were 'road passenger transport services' (29,3%), 'non-specific products' (18,5%), 'accommodation for visitors' (14,3%) and 'air passenger transport services' (13,4%).

The total internal tourism consumption in cash for South Africa in 2015 was R249 691 million (inbound tourism consumption R108 760 million [43,6%] and domestic tourism consumption R140 931 million [56,4%]). The main expenditure items for internal tourism were 'road passenger transport services' (22,1%), 'non-specific products' (21,5%), 'accommodation for visitors' (14,6%) and 'air passenger transport services' (12,8%).

Chapter 1: Introduction

The United Nations World Tourism Organization (UNWTO) defines tourism as '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'. Tourism has become an important economic and social activity in the national and global economy. However, statistical information on the nature, progress and consequences of tourism in South Africa used to be mainly based on arrivals and overnight stay statistics, Balance of Payments (BoP) information and South African Tourism (SAT) surveys, which did not grasp the whole economic phenomenon of tourism. Consequently, government, businesses and citizens may not have received accurate information that is necessary for effective public policies and efficient business operations. These data limitations are overcome by the development of Tourism Satellite Accounts that combine a variety of data sources and align them within the national accounts framework.

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.

The tourism sector is not measured as a sector in its own right in the national accounts, because 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 tourists. Furthermore, tourism consumption includes both 'tourism-characteristic' goods and services (i.e. accommodation, travel services, cable cars, etc.) and 'non-tourism-connected' goods and services (i.e. retail trade), which are consumed largely by non-tourists. The key factor in measuring tourism is to relate purchases by tourists to the total supply of these goods and services within a country.

1.1 The importance of a Tourism Satellite Account

The Tourism Satellite Account (TSA) is an accounting framework adopted by the United Nations (UN) and designed to measure goods and services associated with tourism according to international standards, concepts, classifications and definitions. The TSA provides stakeholders (governments, entrepreneurs and citizens) with reliable data to assist them in the design of public policies and business strategies for tourism and for the evaluation of their efficiency.

The development of a TSA framework has been fuelled by the recognition that its implementation will serve to:

- Increase and improve knowledge of tourism's importance in relation to overall economic activity in a given country;
- Provide a coherent and credible set of tourism accounts that can also be compared internationally across countries;
- Develop quantitative estimates of tourism value added and, thus, analyse the importance of tourism in the economy;
- Provide an instrument for designing more efficient policies on tourism and its employment aspects;
- Identify employment generation in tourism industries and the role tourism plays in job creation for different types of workers;
- Create awareness among players directly and indirectly involved in tourism of the economic importance of this activity; and
- Extend the role of tourism in all industries involved in producing the goods and services demanded by visitors.

1.2 Relationships between the Tourism Satellite Account and the System of National Accounts

The TSA brings together the diverse aspects of tourism by providing a tourism dimension to the framework of the System of National Accounts (SNA). It makes it possible to separate and examine the demand and supply side of tourism in an integrated system that describes the production and demand aspects of the entire economy.

The SNA recommends the development of satellite accounts for the measurement of economic phenomena that are not explicitly shown in the core set of accounts. The TSA was therefore developed for the explicit study of tourism-connected industries and products. A TSA¹ 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; and
- Used to analyse all aspects of demand for goods and services which can 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 activities².

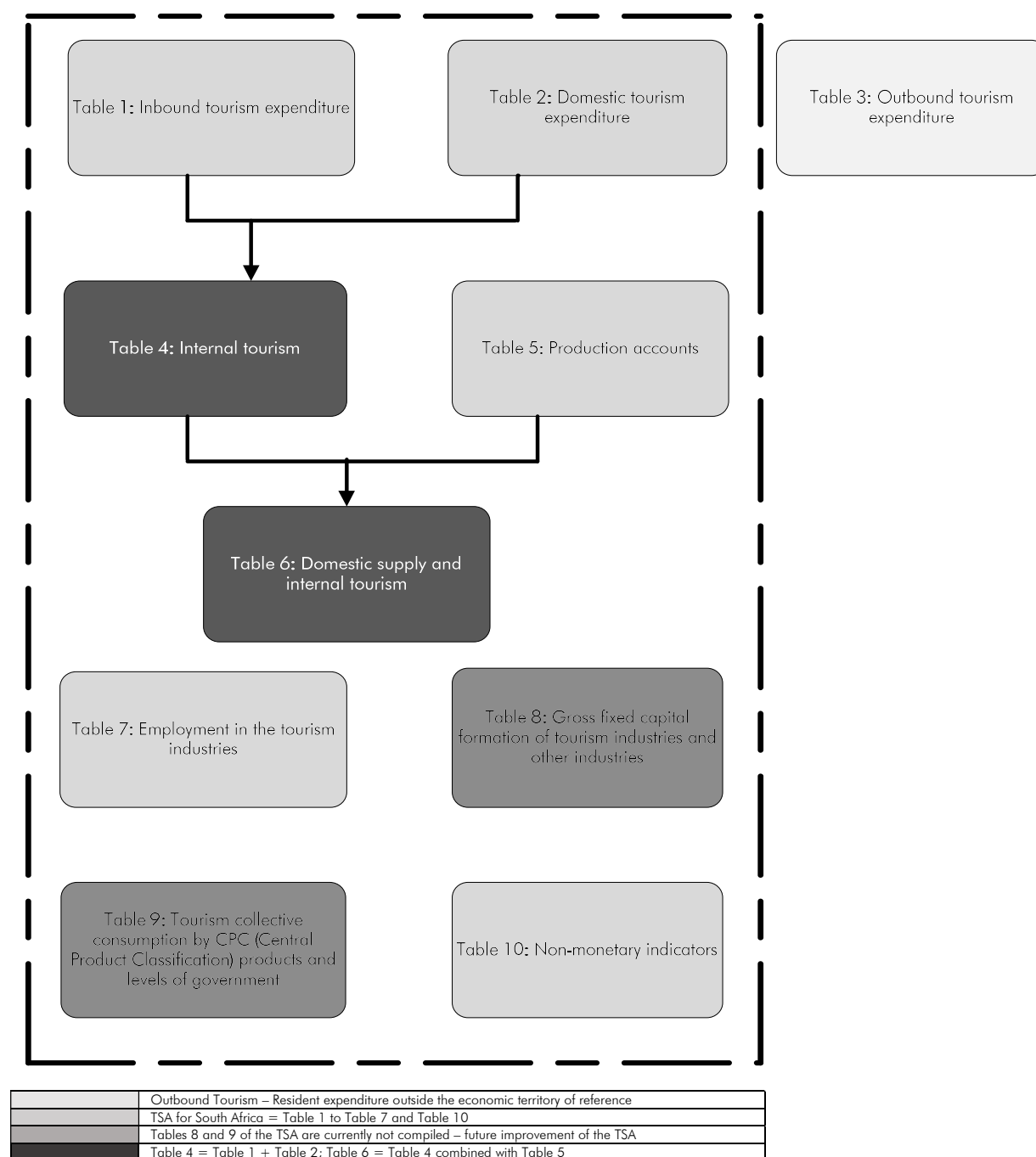
The fundamental structure of a TSA is based on the general relationship existing within an economy between the demand for goods and services generated by tourism on the one hand, and their supply on the other hand, and as such provides a framework for policy analysis of issues related to tourism economics, as well as for model-building, tourism growth analysis and productivity measurements. For South Africa, the TSA will provide a measure of the importance of tourism in terms of gross domestic product (GDP), expenditures and

¹ 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.

² TSA: RMF, 2008

employment which will be comparable with similar measures from the SNA for the overall South African economy (it also allows a comparison with other industries in terms of the above-mentioned variables). The TSA for South Africa, final 2013 and provisional 2014 to 2015 provides a coherent framework from within which to integrate and analyse economic statistics related to tourism activity from both the supply and demand side. The South African TSA follows the international guidelines as prescribed by the UNWTO. Figure 1 shows the 10 tables of the TSA.

Figure 1: The 10 tables of a Tourism Satellite Account



A background to the concepts and methodology used in the compilation of the TSA for South Africa can be found in the discussion document 'Draft Tourism Satellite Account for South Africa, 2005 (Discussion document No. D0405.7)' on the Stats SA website (www.statssa.gov.za) as well as from the Printing and Distribution section at Stats SA (distribution@statssa.gov.za or 012 310 8044/8161). TSA Tables 1 to 7 for 2013 to 2015, in Microsoft Excel spreadsheets, are released with the December 2016 report on the TSA for South Africa, downloadable from www.statssa.gov.za.

Chapter 2: Data sources

2.1 Data sources used for compilation of the Tourism Satellite Account

The Supply and Use Tables (SU-tables) of the SNA are the main source of data for the compilation of Table 5 and Table 6 of the TSA (the confrontation between supply and internal tourism demand). The recommended valuation principles are the same as those of the SNA, namely production should be valued at basic prices and consumption and use at purchasers' prices³.

Several main data sources were used for the compilation of the TSA for South Africa. Stats SA is the official provider of statistics used for policy-making in South Africa. These statistics are obtained from various sources – from periodic household surveys to annual, quarterly or monthly industry surveys as well as administrative data from external sources such as the South African Reserve Bank (SARB) and SAT.

The current data collected on tourism are for both the supply side (from industry surveys) and demand side (from household surveys). Table 1 is a list of the datasets that are published by Stats SA, and which were used for the compilation of the TSA for South Africa.

Table 1: Data sources used for compilation of the Tourism Satellite Account for South Africa at Stats SA

Demand-side data				
Survey/administrative data	Conducted in the past?	Latest publication ⁴	Frequency	Coverage
Tourism and migration	Yes	October 2016 (reference period – August 2016)	Monthly and annually	Movement control system from DHA
Income and Expenditure Survey (IES)	Yes	November 2012 (reference period – 2010/2011)	Every 5 years	30 000 households
Domestic Tourism Survey (DTS)	Yes	September 2015 (2014)	Annually	32 000 households
SU-tables	Yes	Reference period 2014 (64x104) Reference period 2010 (171x104)	Annually Periodically	Entire economy

³ TSA: RMF

⁴ November 2016.

Table 1: Data sources used for compilation of the Tourism Satellite Account for South Africa at Stats SA (concluded)

Supply-side data				
Survey/administrative data	Conducted in the past?	Latest publication	Frequency	Coverage
Financial statistics of consolidated general government	Yes	November 2015 (reference period – 2013/2014)	Annually	General government
Tourist accommodation survey	Yes	October 2016 (reference period – August 2016)	Monthly	1 000 enterprises sampled
Survey of food and beverages	Yes	October 2016 (reference period – August 2016)	Monthly	900 enterprises sampled
Large Sample Survey (LSS) on accommodation	Yes	September 2014 (reference period – 2012)	Every 3 years	2 000 enterprises sampled
LSS on personal services	Yes	December 2009 (reference period – 2008)	Every 3 years	4 277 enterprises sampled
LSS on transport and storage	Yes	October 2015 (reference period – 2013)	Every 3 years	8 600 enterprises sampled
LSS on real estate and business services	Yes	November 2011 (reference period – 2010)	Every 3 years	8 000 enterprises sampled
LSS on wholesale and retail trade	Yes	November 2013 (reference period – 2012)	Every 3 years	Wholesale: 3 000 enterprises sampled Retail: 3 009 enterprises sampled
Annual Financial Statistics (AFS) ⁵	Yes	November 2015 (reference period – 2014)	Annually	13 121 enterprises sampled
SU-tables	Yes	Reference period 2014 (64x104) Reference period 2010 (171x104)	Annually Periodically	Entire economy

Source: Statistics South Africa

In addition to the data sources compiled by Stats SA, other data sources used include SARB Balance of Payments (BoP)⁶ for South Africa and the South African Tourism (SAT) domestic and departure surveys. Table 2 provides a brief description of the SAT domestic and departure surveys.

⁵ The title of the EAS changed to Annual Financial Statistics (AFS) as from the 2007/2008 financial year.

⁶ Compiled quarterly with a lag of a quarter.

Table 2: Data sources used for compilation of the Tourism Satellite Account for South Africa at South African Tourism

Survey/administrative data	Frequency	Last reference year	Coverage ^{7,8}
Departure Survey	Monthly	2015	57 600 people
Domestic Survey	Monthly	2015	15 600 adults

Source: SAT

2.1.1 Supply and Use Tables

The SU-tables are a cornerstone of the SNA. These tables have both a statistical and analytical function. The SU-tables provide a coordinating framework for checking both the accuracy and the consistency of the data contained in the national accounts. One of the many other uses of the SU-tables is that they can be extended to satellite accounts (accounts linking the SNA with specific fields of enquiry). The intent of satellite accounts is to make apparent and to describe in more depth aspects that are hidden in the national accounts framework or surface only in a limited number of points, e.g. tourism. Tourism as such is not an industry and cannot be classified separately. However, specific tourism transactions appear separately only in a few cases. In order to measure and describe tourism in a national accounts framework, use must be made of satellite accounting.

The supply table shows the source or the origin of the goods and services produced within the economy for a given year in a matrix format. The supply of goods and services is measured at basic prices, which is the preferred method of valuing output in the SNA. The basic price is the amount receivable by the producer from the purchaser for a unit of a good or service produced as output *minus* any tax payable *plus* any subsidy receivable on that unit as a consequence of its production or sale. Basic prices exclude any transport charges invoiced separately by the producer.

The use table displays the demand for various goods and services, which may be used as intermediate inputs (goods and services that are purchased by an industry from other industries or imported to produce its outputs) or for final consumption by households, government, etc. The SNA recommends that intermediate and final consumption expenditure be valued at purchasers' prices. The purchasers' price is the amount paid by the purchaser, excluding any deductible value added tax (VAT) or similar deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser. The purchasers' price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place.

⁷ Annual coverage

⁸ Number of individuals covered

2.1.2 South African Tourism's tourism foreign direct spend, the Balance of Payments and inbound tourism expenditure in the Tourism Satellite Account

It is important to note that there are conceptual and methodological differences between the tourism foreign direct spend (TFDS) published by SAT, the BoP as compiled by the SARB, and consequently also the total inbound tourism expenditure in the TSA (Table 1 of the TSA).

TFDS includes all expenditure by foreigners in South Africa. From this total, SAT excludes capital expenditure and the shopping expenditure of traders ('shuttle trade') as this is already included elsewhere in BoP statistics. The BoP is inclusive of concepts such as 'travel' receipts and 'international transportation' receipts. 'Travel' receipts include the domestic spending of seasonal and non-resident workers. The total inbound tourism expenditure as reflected in Table 1 of the TSA therefore includes the 'travel' receipts and 'international transportation' receipts from the BoP as provided by the SARB, but excludes the domestic spending of seasonal and non-resident workers.

Chapter 3: Tourism Satellite Account for South Africa, final 2013 and provisional 2014 and 2015

Tourism is a fast-growing industry globally which is recognised by the South African government for the role it can play in economic growth and poverty reduction. Tourism plays a significant role in influencing economies' generation of value added, employment, personal income and government income⁹. The importance of tourism to both developing and developed nations has created a need to measure its economic and social impact.

3.1 Tourism expenditure

Tourism expenditure refers to the acquisition of goods and services by visitors through a monetary transaction for the direct satisfaction of their wants and needs during their stay at their destination¹⁰. Tables 3a to 3c show tourism expenditure by product for South Africa, for the reference years 2013 to 2015.

Tourism product ratio

Tourism consumption of each product is divided by total supply to calculate the tourism product ratio (which measures the proportion of output of a product used by visitors).

The TSA makes a distinction between three categories of products, namely:

1. A *tourism-characteristic product* is a product that will cease to exist in meaningful quantity, or for which the level of consumption would be significantly reduced, in the absence of visitors. A product is classified as a tourism-characteristic product if at least 25 per cent of its production is purchased by visitors (that is, a tourism-characteristic product has a tourism product ratio of greater than or equal to 0,25).
2. A *tourism-connected (or related) product* is distinct from a tourism-characteristic product in that visitors consume a smaller proportion of the total supply of the product. For a product to be classified as a tourism-connected product, visitors must purchase more than 0 per cent and less than 25 per cent of its production (that is, a tourism-connected product has a tourism product ratio that is greater than 0 and less than 0,25).
3. A *non-tourism-connected product* is a product that is a non-tourism-specific¹¹ product.

The following points are important to consider when looking at production classifications:

- The main reason for making a distinction between product categories is for analytical and presentation purposes. It allows for analysis to be specifically focused on the products that make up the majority of tourism expenditure.
- Tourism products are not exclusively consumed by visitors. A non-visitor can consume a tourism-characteristic product.

⁹ TSA: RMF

¹⁰ TSA: RMF

¹¹ A tourism-specific product is either a tourism-characteristic product or a tourism-related product.

Table 3a: Tourism expenditure by product, 2013

Product	Domestic demand (1)	International demand (exports) (2)	Total demand (3) = (1)+(2)	Total domestic supply (4)	Tourism product ratio (5) = (3)/(4)	Tourism spending abroad (imports) (6)
	R million				Percentage	R million
Characteristic products	89 059	55 468	144 527	277 517	52,1	
Accommodation services	18 211	13 457	31 668	32 939	96,1	
Restaurants and similar	5 294	9 054	14 349	38 087	37,7	
Passenger transport services	56 586	24 012	80 597	170 633	47,2	
<i>Railway passenger transportation services</i>	349	139	488	6 952	7,0	
<i>Road passenger transportation services</i>	36 383	11 434	47 817	128 308	37,3	
<i>Water passenger transportation services</i>	9	3	12	23	52,2	
<i>Air passenger transportation services</i>	17 117	11 042	28 159	29 288	96,1	
Transport equipment rental	2 727	1 394	4 121	6 061	68,0	
Travel agencies and similar services	6 093	2 561	8 655	8 831	98,0	
Cultural services	159	172	331	1 351	24,5	
Sports and recreational services	2 716	6 212	8 928	25 676	34,8	
Connected products	12 262	13 761	26 023	278 079	9,4	
Retail sales of food, beverages and tobacco	6 308	7 072	13 380	136 258	9,8	
Retail sales of textiles, clothing, footwear and leather goods	3 050	4 163	7 212	65 456	11,0	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	81	156	237	19 920	1,2	
Retail sales of household furniture, appliances, articles and equipment	331	1 239	1 569	33 790	4,6	
Retail sales of automotive fuel	2 492	1 133	3 625	22 655	16,0	
Non-specific products	22 817	24 954	47 770	6 451 677	0,7	
Services	15 342	6 488	21 830	3 950 776	0,6	
Goods	7 475	18 466	25 941	2 500 901	1,0	
Total tourism expenditures	124 137	94 183	218 320	7 007 273	3,1	62 596

Individual figures may not add up to stated totals due to rounding.

Table 3b: Tourism expenditure by product, 2014

Product	Domestic demand (1)	International demand (exports) (2)	Total demand (3) = (1)+(2)	Total domestic supply (4)	Tourism product ratio (5) = (3)/(4)	Tourism spending abroad (imports) (6)
	R million				Percentage	R million
Characteristic products	96 440	60 432	156 872	301 939	52,0	
Accommodation services	19 710	14 653	34 363	35 745	96,1	
Restaurants and similar	5 645	9 616	15 262	40 588	37,6	
Passenger transport services	60 863	26 577	87 440	186 133	47,0	
Railway passenger transportation services	376	163	539	7 717	7,0	
Road passenger transportation services	39 068	13 153	52 220	140 433	37,2	
Water passenger transportation services	9	4	13	27	50,6	
Air passenger transportation services	18 533	11 825	30 358	31 618	96,0	
Transport equipment rental	2 878	1 433	4 311	6 339	68,0	
Travel agencies and similar services	6 874	2 887	9 761	9 956	98,0	
Cultural services	157	188	345	1 476	23,4	
Sports and recreational services	3 190	6 511	9 701	28 041	34,6	
Connected products	13 085	15 055	28 140	297 248	9,5	
Retail sales of food, beverages and tobacco	6 732	7 645	14 377	145 917	9,9	
Retail sales of textiles, clothing, footwear and leather goods	3 254	4 625	7 879	69 126	11,4	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	82	187	269	21 560	1,2	
Retail sales of household furniture, appliances, articles and equipment	353	1 386	1 739	36 418	4,8	
Retail sales of automotive fuel	2 665	1 211	3 876	24 227	16,0	
Non-specific products	24 914	31 241	56 156	6 907 525	0,8	
Services	16 751	8 123	24 873	4 250 775	0,6	
Goods	8 164	23 118	31 282	2 656 750	1,2	
Total tourism expenditures	134 440	106 728	241 168	7 506 712	3,2	68 417

Individual figures may not add up to stated totals due to rounding.

Table 3c: Tourism expenditure by product, 2015

Product	Domestic demand (1)	International demand (exports) (2)	Total demand (3) = (1)+(2)	Total domestic supply (4)	Tourism product ratio (5) = (3)/(4)	Tourism spending abroad (imports) (6)
	R million				Percentage	R million
Characteristic products	100 841	65 016	165 856	318 620	52,1	
Accommodation services	20 109	16 354	36 463	37 978	96,0	
Restaurants and similar	6 272	9 946	16 218	43 123	37,6	
Passenger transport services	63 674	28 666	92 340	195 694	47,2	
<i>Railway passenger transportation services</i>	381	186	567	8 108	7,0	
<i>Road passenger transportation services</i>	41 283	13 960	55 243	147 559	37,4	
<i>Water passenger transportation services</i>	10	5	15	28	53,8	
<i>Air passenger transportation services</i>	18 953	12 957	31 909	33 222	96,0	
Transport equipment rental	3 047	1 558	4 606	6 776	68,0	
Travel agencies and similar services	7 223	3 034	10 257	10 461	98,0	
Cultural services	178	192	370	1 568	23,6	
Sports and recreational services	3 384	6 824	10 208	29 796	34,3	
Connected products	14 080	16 187	30 267	315 815	9,6	
Retail sales of food, beverages and tobacco	7 016	8 410	15 426	155 032	10,0	
Retail sales of textiles, clothing, footwear and leather goods	3 728	4 856	8 585	73 444	11,7	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	87	218	305	22 907	1,3	
Retail sales of household furniture, appliances, articles and equipment	417	1 415	1 833	38 693	4,7	
Retail sales of automotive fuel	2 831	1 287	4 118	25 740	16,0	
Non-specific products	26 010	27 557	53 567	7 212 212	0,7	
Services	16 285	7 165	23 449	4 502 268	0,5	
Goods	9 725	20 393	30 118	2 709 944	1,1	
Total tourism expenditures	140 931	108 760	249 691	7 846 647	3,2	72 712

Individual figures may not add up to stated totals due to rounding.

The SNA states that the balance of payments (BoP) summarises transactions between residents and non-residents during a specific time period. For tourism, this relates to the imports and exports of tourism goods and services for a calendar year, i.e.:

- Inbound tourism is the export of tourism goods and services; and
- Outbound tourism is the import of goods and services.

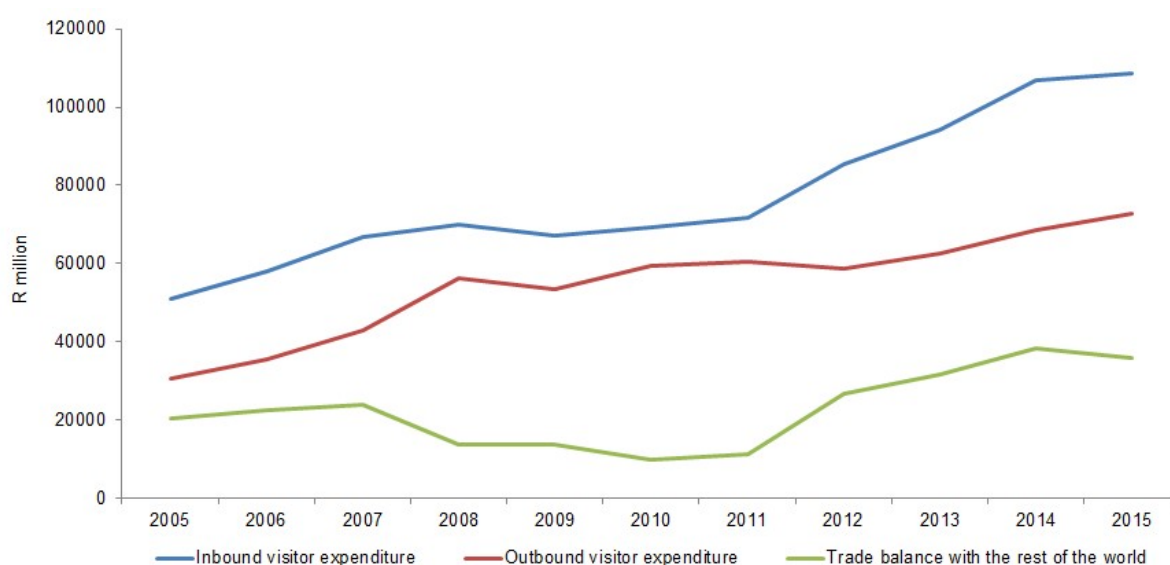
Table 4 and Figure 2 show the Tourism Balance of Payments for South Africa for the reference years 2005 to 2015.

Table 4: The Tourism Balance of Payments for South Africa, 2005–2015

Year	Inbound tourism expenditure	Outbound tourism expenditure	Trade balance with the rest of the world
R million			
2005	51 090	30 631	20 459
2006	57 983	35 413	22 570
2007	66 653	42 875	23 778
2008	69 963	56 317	13 646
2009	67 141	53 553	13 588
2010	69 422	59 452	9 970
2011	71 747	60 545	11 202
2012	85 423	58 588	26 835
2013	94 183	62 596	31 587
2014	106 728	68 417	38 311
2015	108 760	72 712	36 048

Source: South African Reserve Bank

Figure 2: The Tourism Balance of Payments for South Africa, 2005–2015 (R million)



3.1.1 Inbound tourism expenditure

Table 5 and Table 6 show inbound tourism expenditure by type of product (R million and percentage contribution) for the reference years 2011 to 2015; Figure 3 shows corresponding growth rates.

Inbound tourism expenditure totalling R71 747 million was recorded in 2011. The main expenditure items were 'non-specific products' (22,4%), 'accommodation for visitors' (15,7%), 'road passenger transport services' (13,6%) and 'tourism-connected products' (13,6%). Inbound tourism expenditure totalling R108 760 million was recorded in 2015. The main expenditure items were 'non-specific products' (25,3%), 'accommodation for visitors' (15,0%), 'connected products' (14,9%) and 'road passenger transport services' (12,8%).

The year 2015 saw 13 951 901 non-resident visitors to South Africa compared with 14 529 542 non-resident visitors in 2014 and 14 317 908 non-resident visitors in 2013. Of the 13 951 901 non-resident visitors in 2015, 5 048 128 were same-day visitors and 8 903 773 were tourists.

Table 5: Inbound tourism expenditure by type of product, 2011–2015 (R million)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	11 246	12 348	13 457	14 653	16 354
Restaurants and similar services	7 752	8 325	9 054	9 616	9 946
Railway passenger transport services	121	123	139	163	186
Road passenger transport services	9 726	10 693	11 434	13 153	13 960
Water passenger transport services	2	2	3	4	5
Air passenger transport services	8 976	9 828	11 042	11 825	12 957
Transport equipment rental	1 263	1 218	1 394	1 433	1 558
Travel agencies and other reservation services	1 938	2 281	2 561	2 887	3 034
Cultural services	128	142	172	188	192
Sports and recreational services	4 750	5 205	6 212	6 511	6 824
Tourism-connected products	9 777	12 875	13 761	15 055	16 187
Non-specific products	16 069	22 383	24 954	31 241	27 557
Total	71 747	85 423	94 183	106 728	108 760

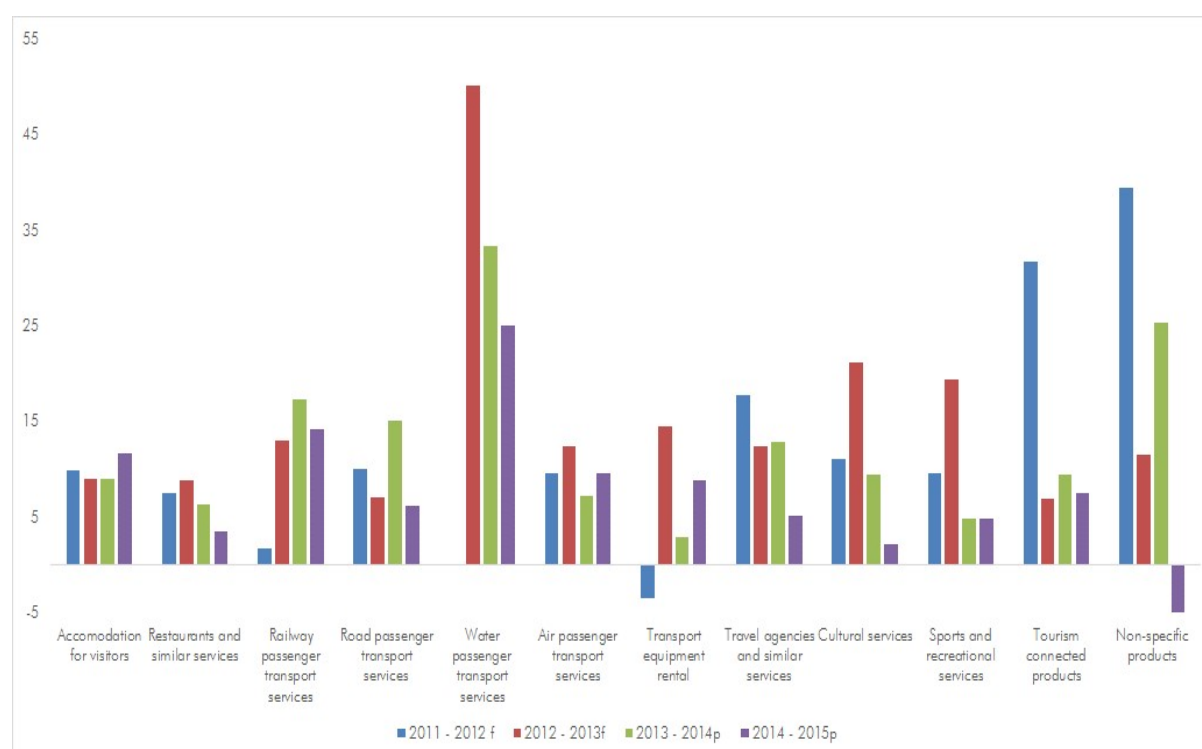
Individual figures may not add up to stated totals due to rounding.

Table 6: Inbound tourism expenditure by type of product, 2011–2015 (%)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	15,7	14,5	14,3	13,7	15,0
Restaurants and similar services	10,8	9,7	9,6	9,0	9,1
Railway passenger transport services	0,2	0,1	0,1	0,2	0,2
Road passenger transport services	13,6	12,5	12,1	12,3	12,8
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	12,5	11,5	11,7	11,1	11,9
Transport equipment rental	1,8	1,4	1,5	1,3	1,4
Travel agencies and other reservation services	2,7	2,7	2,7	2,7	2,8
Cultural services	0,2	0,2	0,2	0,2	0,2
Sports and recreational services	6,6	6,1	6,6	6,1	6,3
Tourism-connected products	13,6	15,1	14,6	14,1	14,9
Non-specific products	22,4	26,2	26,5	29,3	25,3
Total	100,0	100,0	100,0	100,0	100,0

Individual figures may not add up to stated totals due to rounding.

Figure 3: Inbound tourism expenditure: Annual growth by type of product, 2011–2015 (%)



Source: Statistics South Africa

3.1.2 Domestic tourism expenditure

Table 7 and Table 8 show domestic tourism expenditure by type of product (R million and percentage contribution) for the reference years 2011 to 2015; Figure 4 shows corresponding growth rates.

Domestic tourism expenditure totalling R102 824 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2011. The main expenditure items were 'road passenger transport services' (30,4%), 'non-specific products' (20,0%), 'accommodation for visitors' (13,5%) and 'air passenger transport services' (12,9%).

Domestic tourism expenditure totalling R140 931 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2015. The main expenditure items were 'road passenger transport services' (29,3%), 'non-specific products' (18,5%), 'accommodation for visitors' (14,3%) and 'air passenger transport services' (13,4%).

Table 7: Domestic tourism expenditure by type of product, 2011–2015 (R million)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	13 928	16 194	18 211	19 710	20 109
Restaurants and similar services	4 252	4 684	5 294	5 645	6 272
Railway passenger transport services	240	297	349	376	381
Road passenger transport services	31 272	33 560	36 383	39 068	41 283
Water passenger transport services	7	8	9	9	10
Air passenger transport services	13 264	15 760	17 117	18 533	18 953
Transport equipment rental	2 102	2 545	2 727	2 878	3 047
Travel agencies and other reservation services	4 614	5 431	6 093	6 874	7 223
Cultural services	118	129	159	157	178
Sports and recreational services	1 712	1 872	2 716	3 190	3 384
Tourism-connected products	10 731	11 261	12 262	13 085	14 080
Non-specific products	20 582	22 769	22 817	24 914	26 010
Total	102 824	114 511	124 137	134 440	140 931

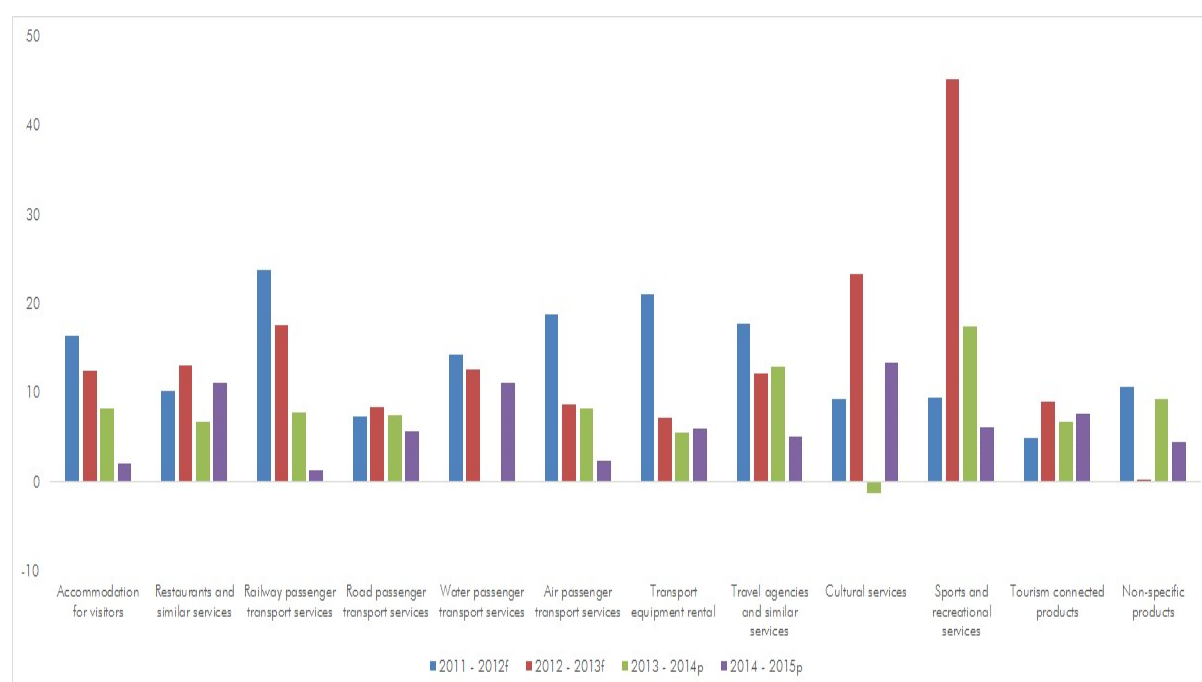
Individual figures may not add up to stated totals due to rounding.

Table 8: Domestic tourism expenditure by type of product, 2011–2015 (%)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	13,5	14,1	14,7	14,7	14,3
Restaurants and similar services	4,1	4,1	4,3	4,2	4,5
Railway passenger transport services	0,2	0,3	0,3	0,3	0,3
Road passenger transport services	30,4	29,3	29,3	29,1	29,3
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	12,9	13,8	13,8	13,8	13,4
Transport equipment rental	2,0	2,2	2,2	2,1	2,2
Travel agencies and other reservation services	4,5	4,7	4,9	5,1	5,1
Cultural services	0,1	0,1	0,1	0,1	0,1
Sports and recreational services	1,7	1,6	2,2	2,4	2,4
Tourism-connected products	10,4	9,8	9,9	9,7	10,0
Non-specific products	20,0	19,9	18,4	18,5	18,5
Total	100,0	100,0	100,0	100,0	100,0

Individual figures may not add up to stated totals due to rounding.

Figure 4: Domestic tourism expenditure: Annual growth by type of product, 2011–2015 (%)



Source: Statistics South Africa

3.1.3. Internal tourism expenditure

Table 9 and Table 10 show internal tourism expenditure by type of product (goods and services) (R million and percentage contribution) for the reference years 2011 to 2015; Figure 5 shows corresponding growth rates.

The total internal tourism consumption in cash for South Africa in 2011 was R174 571 million (inbound tourism consumption R71 747 million [41,1%] and domestic tourism consumption R102 824 million [58,9%]). The main expenditure items for internal tourism were 'road passenger transport services' (23,5%), 'non-specific products' (21,0%), 'accommodation for visitors' (14,4%) and 'air passenger transport services' (12,7%).

The total internal tourism consumption in cash for South Africa in 2015 was R249 691 million (inbound tourism consumption R108 760 million [43,6%] and domestic tourism consumption R140 931 million [56,4%]). The main expenditure items for internal tourism were 'road passenger transport services' (22,1%), 'non-specific products' (21,5%), 'accommodation for visitors' (14,6%) and 'air passenger transport services' (12,8%).

Table 9: Internal tourism expenditure by type of product, 2011–2015 (R million)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	25 174	28 543	31 668	34 363	36 463
Restaurants and similar services	12 004	13 009	14 349	15 262	16 218
Railway passenger transport services	361	420	488	539	567
Road passenger transport services	40 998	44 253	47 817	52 220	55 243
Water passenger transport services	9	10	12	13	15
Air passenger transport services	22 240	25 588	28 159	30 358	31 909
Transport equipment rental	3 365	3 763	4 121	4 311	4 606
Travel agencies and other reservation services	6 553	7 712	8 655	9 761	10 257
Cultural services	246	271	331	345	370
Sports and recreational services	6 462	7 077	8 928	9 701	10 208
Tourism-connected products	20 508	24 135	26 023	28 140	30 267
Non-specific products	36 651	45 152	47 770	56 156	53 567
Total	174 571	199 934	218 320	241 168	249 691

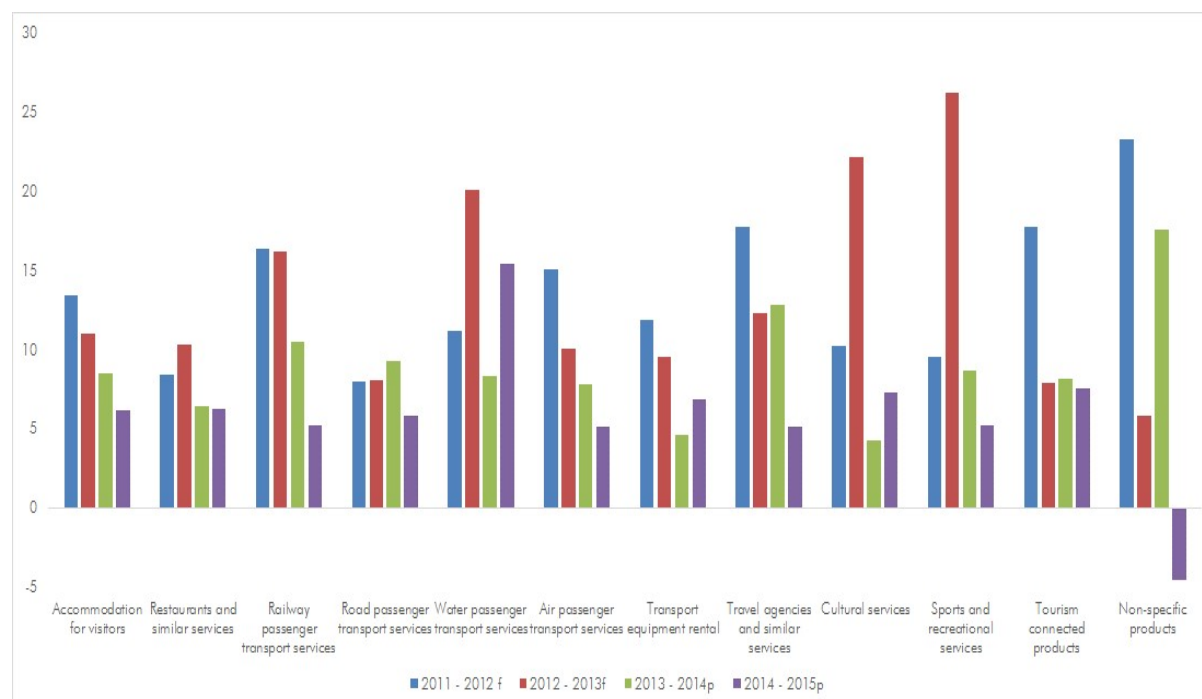
Individual figures may not add up to stated totals due to rounding.

Table 10: Internal tourism expenditure by type of product, 2011–2015 (%)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	14,4	14,3	14,5	14,2	14,6
Restaurants and similar services	6,9	6,5	6,6	6,3	6,5
Railway passenger transport services	0,2	0,2	0,2	0,2	0,2
Road passenger transport services	23,5	22,1	21,9	21,7	22,1
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	12,7	12,8	12,9	12,6	12,8
Transport equipment rental	1,9	1,9	1,9	1,8	1,8
Travel agencies and other reservation services	3,8	3,9	4,0	4,0	4,1
Cultural services	0,1	0,1	0,2	0,1	0,1
Sports and recreational services	3,7	3,5	4,1	4,0	4,1
Tourism-connected products	11,7	12,1	11,9	11,7	12,1
Non-specific products	21,0	22,6	21,9	23,3	21,5
Total	100,0	100,0	100,0	100,0	100,0

Individual figures may not add up to stated totals due to rounding.

Figure 5: Internal tourism expenditure: Annual growth by type of product, 2011–2015 (%)



Source: Statistics South Africa

3.2 Production accounts

Table 5 of the TSA (see Figure 1) focuses on the production accounts of tourism industries and other industries (at basic prices). It conforms formally to the format established by the SNA, but the perspective is different from that of the SNA production accounts (a tool for tourism analysis). Because of the application of the principle of recording reservation services separately, output and intermediate consumption of each industry and the corresponding total for the economy that appears in the last column do not necessarily correspond to the corresponding values found in the national accounts of the country¹². For each industry and for the total economy, gross value added (GVA) at basic prices has to equal the GVA of the economy as it appears in the national accounts¹³.

Tables 11a to 11c show the production accounts for the tourism industries and other industries for the reference years 2013 to 2015. The gross direct value added of the tourism industries (GDVATI) is the major economic aggregate derived in the production accounts of the tourism industries and other industries (Table 5 of the TSA). The GDVATI for South Africa amounted to R182 835 million (or 5,7% of total GVA generated) in 2013, R198 712 million (or 5,8% of total GVA generated) in 2014 and R210 053 million (or 5,9% of total GVA generated) in 2015.

¹² TSA: RMF

¹³ Adjustments due to the application of the principle of recording reservation services separately have no effect on the VA of any of the industries.

Table 11a: Production accounts of the tourism industries and other industries (at basic prices), 2013
(R million)

Product	Tourism-characteristic industries	Tourism-connected industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	254 852	108 090	192 654	555 596
A.1 Characteristic products	254 852		22 665	277 517
1. Accommodation services	27 793		5 146	32 939
1.1 Hotel and other accommodation for visitors other than 1.2	27 793		5 146	32 939
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	27 239		10 848	38 087
3. Passenger transport services	163 961		6 671	170 633
3.1 Railway passenger transport services	6 952			6 952
3.2 Road passenger transport services	121 637		6 671	128 308
3.3 Water passenger transport services	23			23
3.4 Air passenger transport services	29 288			29 288
3.5 Passenger transport equipment rental	6 061			6 061
4. Travel agencies and other reservation services	8 831			8 831
5. Cultural industry	1 351			1 351
6. Sports and recreational industry	25 676			25 676
A.2 Connected products		108 090	169 989	278 079
Retail sales of food, beverages and tobacco		41 191	95 067	136 258
Retail sales of textiles, clothing, footwear and leather products		16 364	49 092	65 456
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		12 720	7 200	19 920
Retail sales of household furniture, appliances, articles and equipment		23 018	10 772	33 790
Retail sales of automotive fuel		14 796	7 859	22 655
B. Non-specific products	26 912	1 183	6 423 583	6 451 677
Services	26 912	1 183	3 922 682	3 950 776
Goods			2 500 901	2 500 901
Total output (at basic prices)	281 763	109 272	6 616 237	7 007 273
Total intermediate consumption (at purchasers' prices)	158 166	50 035	3 608 113	3 816 313
Total gross value added (at basic prices)	123 598	59 238	3 008 124	3 190 960
Compensation of employees	44 594	33 504	1 547 020	1 625 118
Taxes less subsidies on production	1 329	1 125	50 427	52 881
Gross operating surplus	77 676	24 609	1 410 676	1 512 961

Individual figures may not add up to stated totals due to rounding.

Table 11b: Production accounts of the tourism industries and other industries (at basic prices), 2014
(R million)

Product	Tourism- characteristic industries	Tourism- connected industries	Other non- tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	277 105	116 265	205 817	599 187
A.1 Characteristic products	277 105		24 834	301 939
1. Accommodation services	30 051		5 694	35 745
1.1 Hotel and other accommodation for visitors other than 1.2	30 051		5 694	35 745
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	29 027		11 561	40 588
3. Passenger transport services	178 554		7 579	186 133
3.1 Railway passenger transport services	7 717			7 717
3.2 Road passenger transport services	132 854		7 579	140 433
3.3 Water passenger transport services	27			27
3.4 Air passenger transport services	31 618			31 618
3.5 Passenger transport equipment rental	6 339			6 339
4. Travel agencies and other reservation services	9 956			9 956
5. Cultural industry	1 476			1 476
6. Sports and recreational industry	28 041			28 041
A.2 Connected products		116 265	180 983	297 248
Retail sales of food, beverages and tobacco		43 863	102 055	145 917
Retail sales of textiles, clothing, footwear and leather products		17 282	51 845	69 126
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		13 956	7 604	21 560
Retail sales of household furniture, appliances, articles and equipment		25 061	11 357	36 418
Retail sales of automotive fuel		16 104	8 123	24 227
B. Non-specific products	28 947	1 271	6 877 307	6 907 525
Services	28 947	1 271	4 220 557	4 250 775
Goods			2 656 750	2 656 750
Total output (at basic prices)	306 053	117 536	7 083 124	7 506 712
Total intermediate consumption (at purchasers' prices)	171 785	53 092	3 861 519	4 086 396
Total gross value added (at basic prices)	134 268	64 444	3 221 604	3 420 316
Compensation of employees	48 342	36 440	1 669 613	1 754 395
Taxes less subsidies on production	1 893	1 294	60 439	63 626
Gross operating surplus	84 035	26 711	1 491 550	1 602 296

Individual figures may not add up to stated totals due to rounding.

Table 11c: Production accounts of the tourism industries and other industries (at basic prices), 2015
(R million)

Product	Tourism-characteristic industries	Tourism-connected industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	292 323	123 528	218 585	634 435
A.1 Characteristic products	292 323		26 297	318 620
1. Accommodation services	31 928		6 050	37 978
1.1 Hotel and other accommodation for visitors other than 1.2	31 928		6 050	37 978
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	30 840		12 283	43 123
3. Passenger transport services	187 730		7 964	195 694
3.1 Railway passenger transport services	8 108			8 108
3.2 Road passenger transport services	139 595		7 964	147 559
3.3 Water passenger transport services	28			28
3.4 Air passenger transport services	33 222			33 222
3.5 Passenger transport equipment rental	6 776			6 776
4. Travel agencies and other reservation services	10 461			10 461
5. Cultural industry	1 568			1 568
6. Sports and recreational industry	29 796			29 796
A.2 Connected products		123 528	192 287	315 815
Retail sales of food, beverages and tobacco		46 602	108 429	155 032
Retail sales of textiles, clothing, footwear and leather products		18 361	55 083	73 444
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		14 828	8 079	22 907
Retail sales of household furniture, appliances, articles and equipment		26 627	12 066	38 693
Retail sales of automotive fuel		17 109	8 631	25 740
B. Non-specific products	31 081	1 350	7 179 781	7 212 212
Services	31 081	1 350	4 469 837	4 502 268
Goods			2 709 944	2 709 944
Total output (at basic prices)	323 404	124 878	7 398 365	7 846 647
Total intermediate consumption (at purchasers' prices)	181 792	56 437	4 018 606	4 256 835
Total gross value added (at basic prices)	141 612	68 441	3 379 759	3 589 812
Compensation of employees	51 035	38 716	1 753 673	1 843 424
Taxes less subsidies on production	2 009	1 375	64 000	67 384
Gross operating surplus	88 569	28 349	1 562 087	1 679 004

Individual figures may not add up to stated totals due to rounding.

3.3 Domestic supply and internal tourism consumption by product

Table 6 (see Figure 1) is the core of the TSA and focuses on total domestic supply and internal tourism consumption (at purchasers' prices). The confrontation and reconciliation between supply and demand (inclusive of internal tourism consumption) takes place within this table. It is derived from the SU-tables in the SNA¹⁴. Tables 12a to 12c show the domestic supply and internal tourism consumption by product (Table 6 of the TSA) for the reference years 2013 to 2015. The tourism direct gross value added (TDGVA) for South Africa amounted to R95 469 million (or 3,0% of total GVA generated) in 2013, R105 789 million (or 3,1% of total GVA generated) in 2014 and R109 605 million (or 3,1% of total GVA generated) in 2015.

Tables 13a to 13c show the compilation of tourism industry ratios for the reference years 2013 to 2015.

Tourism industry ratio

The tourism industry ratio is the proportion of an industry's output that is consumed by visitors.

The TSA makes a distinction between three categories of industries, namely:

- 1 A *tourism-characteristic* industry is one where either:
 - At least 25 per cent of the industry's output is purchased by visitors (that is, the tourism industry ratio is greater than or equal to 0,25); or
 - The industry's characteristic output includes a tourism-characteristic product. For example, less than 25 per cent of the railway transport industry's output is consumed by visitors, but its characteristic outputs are railway freight transport and railway passenger transport. Railway passenger transport is a tourism-characteristic product so the railway transport industry is classified as a tourism-characteristic industry and a direct physical contact occurs between the industry and the tourist buying the product.
- 2 A *tourism-connected (or related) industry* is one where:
 - The industry is not a tourism-characteristic industry;
 - Between 5 per cent and 25 per cent of the industry's output is purchased by visitors (that is, the tourism industry ratio is greater than 0,05 and less than 0,25); and
 - A direct physical contact occurs between the industry and the visitor buying its product.

In practice the retail trade industry is the only tourism-connected industry.

- 3 A *non-tourism-connected industry* is any industry that is not a tourism-characteristic or tourism-connected industry. A non-tourism industry may still sell some of its products to visitors.

The classification of industries has no effect on the value of direct tourism VA, as this is determined by the scope of total tourism direct demand.

¹⁴ TSA: RMF

Table 12a: Domestic supply and internal tourism consumption by product, 2013 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total output of domestic producers at basic prices	Taxes less subsidies
	Accommodation for visitors	Food and beverage serving industry	Passenger transport industry	Transport equipment rental	Travel agencies and other reservation services industry	Cultural and sport and recreational industry		Trade of tourism-connected goods			
A. Specific products	29 597	7 386	73 990	4 121	8 655	9 259	133 007	9 345	28 108	170 550	
A.1 Characteristic products	29 597	7 386	73 990	4 121	8 655	9 259	133 007		11 520	144 527	
1. Accommodation services	26 721						26 271		4 947	31 668	
1.1 Hotel and other accommodation for visitors other than 1.2	26 721						26 271		4 947	31 668	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 877	7 386					10 262		4 087	14 349	
3. Passenger transport services			73 990	4 121			78 111		2 486	80 597	
3.1 Railway passenger transport services			488				488			488	
3.2 Road passenger transport services			45 331				45 331		2 486	47 817	
3.3 Water passenger transport services			12				12			12	
3.4 Air passenger transport services			28 159				28 159			28 159	
3.5 Passenger transport equipment rental				4 121			4 121			4 121	
4. Travel agencies and other reservation services					8 655		8 655			8 655	
5. Cultural industry						331	331			331	
6. Sports and recreational industry						8 928	8 928			8 928	
A.2 Connected products								9 435	16 588	26 023	
Retail sales of food, beverages and tobacco								4 045	9 335	13 380	
Retail sales of textiles, clothing, footwear and leather products								1 803	5 409	7 212	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								151	86	237	
Retail sales of household furniture, appliances, articles and equipment								1 069	500	1 569	
Retail sales of automotive fuel								2 367	1 257	3 625	
B. Non-specific products	10 733	1	8	1	5	22	10 771	3	36 995	47 770	
Services	10 733	1	8	1	5	22	10 771	3	11 055	21 829	
Goods									25 941	25 941	
Total output (at basic prices)	40 330	7 387	73 998	4 122	8 660	9 280	143 778	9 439	65 103	218 320	7 880
Total intermediate consumption (at purchasers' prices)	23 417	4 611	40 752	2 760	4 884	6 600	83 025	4 322	35 504	122 850	
Total gross value added (at basic prices)	16 914	2 775	33 247	1 362	3 775	2 679	60 753	5 117	29 600	95 469	

Individual figures may not add up to stated totals due to rounding.

Table 12b: Domestic supply and internal tourism consumption by product, 2014 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total output of domestic producers at basic prices	Taxes less subsidies
	Accommodation for visitors	Food and beverage serving industry	Passenger transport industry	Transport equipment rental	Travel agencies and other reservation services industry	Cultural and sport and recreational industry		Trade of tourism-connected goods			
A. Specific products	31 968	7 836	80 312	4 311	9 761	10 046	144 233	10 239	30 541	185 012	
A.1 Characteristic products	31 968	7 836	80 312	4 311	9 761	10 046	144 233		12 639	156 872	
1. Accommodation services	28 889						28 889		5 474	34 363	
1.1 Hotel and other accommodation for visitors other than 1.2	28 889						28 889		5 474	34 363	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 079	7 836					10 915		4 347	15 262	
3. Passenger transport services			80 312	4 311			84 622		2 818	87 440	
3.1 Railway passenger transport services			539				539			539	
3.2 Road passenger transport services			49 402				49 402		2 818	52 220	
3.3 Water passenger transport services			13				13			13	
3.4 Air passenger transport services			30 358				30 358			30 358	
3.5 Passenger transport equipment rental				4 311			4 311			4 311	
4. Travel agencies and other reservation services					9 761		9 761			9 761	
5. Cultural industry						345	345			345	
6. Sports and recreational industry						9 701	9 701			9 701	
A.2 Connected products								10 239	17 901	28 140	
Retail sales of food, beverages and tobacco								4 322	10 055	14 377	
Retail sales of textiles, clothing, footwear and leather products								1 970	5 909	7 879	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								174	95	269	
Retail sales of household furniture, appliances, articles and equipment								1 196	542	1 739	
Retail sales of automotive fuel								2 577	1 300	3 876	
B. Non-specific products	11 503	1	9	1	7	24	11 545	4	44 607	56 156	
Services	11 503	1	9	1	7	24	11 545	4	13 325	24 873	
Goods									31 282	31 282	
Total output (at basic prices)	43 471	7 837	80 321	4 311	9 768	10 069	155 778	10 242	75 148	241 168	8 630
Total intermediate consumption (at purchasers' prices)	24 781	4 881	44 219	3 053	5 596	7 251	89 782	4 627	40 971	135 379	
Total gross value added (at basic prices)	18 690	2 955	36 102	1 258	4 172	2 817	65 996	5 616	34 177	105 789	

Individual figures may not add up to stated totals due to rounding.

Table 12c: Domestic supply and internal tourism consumption by product, 2015 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total output of domestic producers at basic prices	Taxes less subsidies
	Accommodation for visitors	Food and beverage serving industry	Passenger transport industry	Transport equipment rental	Travel agencies and other reservation services industry	Cultural and sport and recreational industry		Trade of tourism-connected goods			
A. Specific products	33 926	8 327	84 752	4 606	10 257	10 578	152 446	10 980	32 697	196 123	
A.1 Characteristic products	33 926	8 327	84 752	4 606	10 257	10 578	152 446		13 410	165 856	
1. Accommodation services	30 654						30 654		5 809	36 463	
1.1 Hotel and other accommodation for visitors other than 1.2	30 654						30 654		5 809	36 463	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 272	8 327					11 599		4 619	16 218	
3. Passenger transport services			84 752	4 606			89 359		2 981	92 340	
3.1 Railway passenger transport services			567				567			567	
3.2 Road passenger transport services			52 261				52 261		2 981	55 243	
3.3 Water passenger transport services			15				15			15	
3.4 Air passenger transport services			31 909				31 909			31 909	
3.5 Passenger transport equipment rental				4 606			4 606			4 606	
4. Travel agencies and other reservation services					10 257		10 257			10 257	
5. Cultural industry						370	370			370	
6. Sports and recreational industry						10 208	10 208			10 208	
A.2 Connected products								10 980	19 288	30 267	
Retail sales of food, beverages and tobacco								4 637	10 789	15 426	
Retail sales of textiles, clothing, footwear and leather products								2 146	6 439	8 585	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								198	108	305	
Retail sales of household furniture, appliances, articles and equipment								1 261	572	1 833	
Retail sales of automotive fuel								2 738	1 381	4 118	
B. Non-specific products	12 219	1	12	1	7	25	12 266	4	41 297	53 567	
Services	12 219	1	12	1	7	25	12 266	4	11 180	23 449	
Goods									30 118	30 118	
Total output (at basic prices)	46 146	8 328	84 765	4 607	10 264	10 602	164 712	10 983	73 995	249 690	9 323
Total intermediate consumption (at purchasers' prices)	26 305	5 187	46 655	3 262	5 880	7 638	94 929	4 964	40 192	140 085	
Total gross value added (at basic prices)	19 840	3 141	38 110	1 344	4 384	2 964	69 783	6 020	33 802	109 605	

Individual figures may not add up to stated totals due to rounding.

Table 13a: Derivation of tourism industry ratios, 2013 (R million)

Product	Tourism-characteristic industries										Tourism-connected industries
	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	29 597	7 386	488	45 331	12	28 159	4 121	8 655	331	8 928	9 435
A.1 Characteristic products	29 597	7 386	488	45 331	12	28 159	4 121	8 655	331	8 928	
1. Accommodation services	26 721										
1.1 Hotel and other accommodation for visitors other than 1.2	26 721										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 877	7 386									
3. Passenger transport services			488	45 331	12	28 159	4 121				
3.1 Railway passenger transport services			488								
3.2 Road passenger transport services				45 331							
3.3 Water passenger transport services					12						
3.4 Air passenger transport services						28 159					
3.5 Passenger transport equipment rental							4 121				
4. Travel agencies and other reservation services								8 655			
5. Cultural industry									331		
6. Sports and recreational industry										8 928	
A.2 Connected products											9 435
Retail sales of food, beverages and tobacco											4 045
Retail sales of textiles, clothing, footwear and leather products											1 803
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											151
Retail sales of household furniture, appliances, articles and equipment											1 069
Retail sales of automotive fuel											2 367
B. Non-specific products	10 733	1		2		6	1	5	1	21	3
Services	10 733	1		2		6	1	5	1	21	3
Goods											
Total purchased by tourists	40 330	7 387	488	45 333	12	28 165	4 122	8 660	331	8 949	9 439
Total industry output	50 762	20 016	6 970	122 434	26	31 592	6 308	8 837	1 741	33 077	109 272
Tourism industry ratio (%)	79,0	37,0	7,0	37,0	46,0	89,0	65,0	98,0	19,0	27,0	9,0

Individual figures may not add up to stated totals due to rounding.

Table 13b: Derivation of tourism industry ratios, 2014 (R million)

Product	Tourism-characteristic industries										Tourism-connected industries
	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	31 968	7 836	539	49 402	13	30 358	4 311	9 761	345	9 701	10 239
A.1 Characteristic products	31 968	7 836	539	49 402	13	30 358	4 311	9 761	345	9 701	
1. Accommodation services	28 889										
1.1 Hotel and other accommodation for visitors other than 1.2	21 889										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 079	7 836									
3. Passenger transport services			539	49 402	13	30 358	4 311				
3.1 Railway passenger transport services			539								
3.2 Road passenger transport services				49 402							
3.3 Water passenger transport services					13						
3.4 Air passenger transport services						30 358					
3.5 Passenger transport equipment rental							4 311				
4. Travel agencies and other reservation services								9 761			
5. Cultural industry									345		
6. Sports and recreational industry										9 701	
A.2 Connected products											10 239
Retail sales of food, beverages and tobacco											4 322
Retail sales of textiles, clothing, footwear and leather products											1 970
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											174
Retail sales of household furniture, appliances, articles and equipment											1 196
Retail sales of automotive fuel											2 577
B. Non-specific products	11 503	1		2		7	1	7	1	23	4
Services	11 503	1		2		7	1	7	1	23	4
Goods											
Total purchased by tourists	43 471	7 837	539	49 404	13	30 365	4 311	9 768	345	9 724	10 242
Total industry output	54 620	21 252	7 739	133 720	30	34 131	6 597	9 963	1 900	36 100	117 536
Tourism industry ratio (%)	80,0	37,0	7,0	37,0	44,0	89,0	65,0	98,0	18,0	27,0	9,0

Individual figures may not add up to stated totals due to rounding.

Table 13c: Derivation of tourism industry ratios, 2015 (R million)

Product	Tourism-characteristic industries										Tourism-connected industries
	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	33 926	8 327	567	52 261	15	31 909	4 606	10 257	370	10 208	10 980
A.1 Characteristic products	33 926	8 327	567	52 261	15	31 909	4 606	10 257	370	10 208	
1. Accommodation services	30 654										
1.1 Hotel and other accommodation for visitors other than 1.2	30 654										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 272	8 327									
3. Passenger transport services			567	52 261	15	31 909	4 606				
3.1 Railway passenger transport services			567								
3.2 Road passenger transport services				52 261							
3.3 Water passenger transport services					15						
3.4 Air passenger transport services						31 909					
3.5 Passenger transport equipment rental							4 606				
4. Travel agencies and other reservation services								10 257			
5. Cultural industry									370		
6. Sports and recreational industry										10 208	
A.2 Connected products											10 980
Retail sales of food, beverages and tobacco											4 637
Retail sales of textiles, clothing, footwear and leather products											2 146
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											198
Retail sales of household furniture, appliances, articles and equipment											1 261
Retail sales of automotive fuel											2 738
B. Non-specific products	12 219	1		3		7	1	7	1	24	4
Services	12 219	1		3		7	1	7	1	24	4
Goods											
Total purchased by tourists	46 146	8 328	567	52 264	15	31 917	4 607	10 264	370	10 232	10 983
Total industry output	58 032	22 579	8 463	140 506	32	35 863	7 052	10 468	2 020	38 389	124 878
Tourism industry ratio (%)	80,0	37,0	7,0	37,0	47,0	89,0	65,0	98,0	18,0	27,0	9,0

Individual figures may not add up to stated totals due to rounding.

Table 6¹⁵ of the TSA (see Figure 1) presents the reconciliation between internal tourism consumption and domestic supply, and it is from this table that TDGVA and tourism direct gross domestic product (TDGDP) can be derived. Part of the aggregate TDGVA can be generated by tourism industries and part of it may also be generated by other industries. Not all GVATI is part of the TDGVA as these industries may also serve non-visitors; in the same way the non-tourism industries may serve visitors and thus generate part of TDGVA¹⁶. The estimates of TDGVA and TDGDP rely on a number of assumptions and implicit modelling procedures, and thus special care must be taken when using or interpreting these aggregates¹⁷. Figure 6 explains schematically the link between GDVATI and TDGVA.

Figure 6: Link between gross direct value added of the tourism industries and tourism direct gross value added

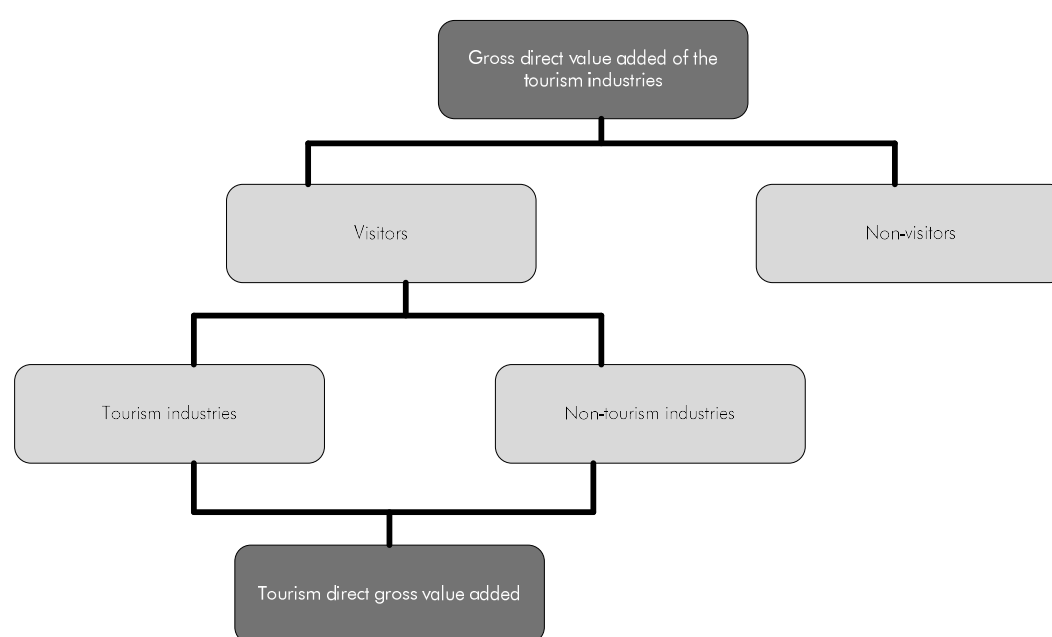


Table 14 shows the calculation of TDGVA and TDGDP for South Africa for 2011 to 2015. TDGDP was R118 928 million (or 3,0% of total GDP) in 2015.

¹⁵ This table is the core of the TSA.

¹⁶ TSA: RMF

¹⁷ TSA: RMF

Table 14: Tourism direct gross value added and tourism direct gross domestic product, 2011–2015 (R million)

	2011	2012	2013	2014	2015
Total supply of goods and services	7 127 205	7 795 799	8 543 232	9 153 541	9 543 920
Less imports of goods and services	894 678	1 011 810	1 177 766	1 254 539	1 273 493
Less net taxes (taxes less subsidies) on products	299 928	322 902	358 193	392 290	423 780
Equals total domestic supply of goods and services (output)	5 932 595	6 461 084	7 007 273	7 506 712	7 846 647
Less intermediate consumption	3 207 572	3 521 443	3 816 313	4 086 396	4 256 835
Gross value added of the economy	2 725 022	2 939 640	3 190 960	3 420 316	3 589 812
Total tourism output	174 571	199 934	218 320	241 168	249 691
Less total tourism intermediate consumption	97 208	113 288	122 850	135 379	140 085
Equals tourism direct gross value added (TDGVA)	77 364	86 646	95 469	105 789	109 605
TDGVA (% of GVA)	2,8	2,9	3,0	3,1	3,1
Tourism direct gross value added	77 364	86 646	95 469	105 789	109 605
Plus tourism share of net taxes on products	6 598	7 104	7 880	8 630	9 323
Equals tourism direct gross domestic product (TDGDP)	83 962	93 750	103 349	114 419	118 928
TDGDP¹⁸ (% of GDP)	2,8	2,9	2,9	3,0	3,0

Table 15 and Table 16 as well as Figure 7 show TDGVA for 2011 to 2015 (R million and percentage contribution).

Table 15: Tourism direct gross value added, 2011–2015 (R million)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	14 696	15 117	16 914	18 690	19 840
Food and beverage serving industry	2 136	2 431	2 775	2 955	3 141
Railway passenger transport	236	281	325	360	366
Road passenger transport	19 777	21 608	23 577	25 653	27 138
Water passenger transport	3	4	6	7	8
Air passenger transport	7 324	8 228	9 339	10 082	10 598
Transport equipment rental	1 250	1 091	1 362	1 258	1 344
Travel agencies and other reservation services industry	2 916	3 347	3 775	4 172	4 384
Cultural industry	76	79	96	96	103
Sports and recreational industry	1 998	2 057	2 583	2 721	2 861
Retail trade of tourism-connected goods	4 161	4 746	5 117	5 616	6 020
Other non-tourism industries	22 789	27 654	29 600	34 177	33 802
Total	77 364	86 646	95 469	105 789	109 605

Individual figures may not add up to stated totals due to rounding.

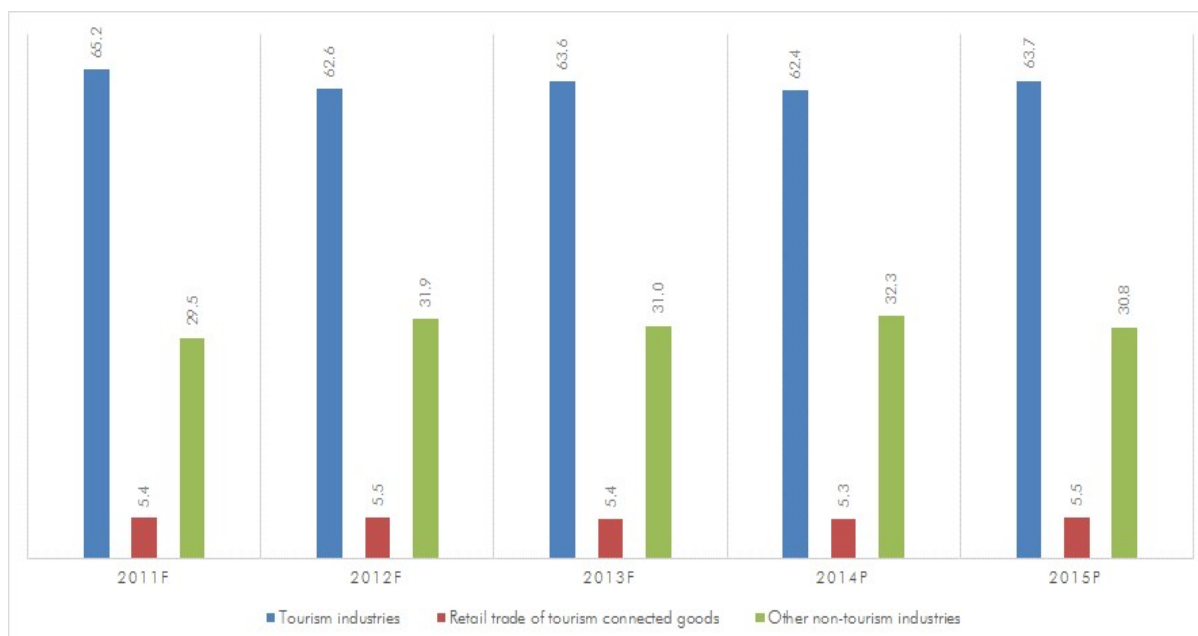
¹⁸ Gross domestic product is equal to gross value added plus net taxes on products.

Table 16: Tourism direct gross value added, 2011–2015 (%)

Tourism product	2011	2012	2013	2014	2015
Accommodation for visitors	19,0	17,4	17,7	17,7	18,1
Food and beverage serving industry	2,8	2,8	2,9	2,8	2,9
Railway passenger transport	0,3	0,3	0,3	0,3	0,3
Road passenger transport	25,6	24,9	24,7	24,2	24,8
Water passenger transport	0,0	0,0	0,0	0,0	0,0
Air passenger transport	9,5	9,5	9,8	9,5	9,7
Transport equipment rental	1,6	1,3	1,4	1,2	1,2
Travel agencies and other reservation services industry	3,8	3,9	4,0	3,9	4,0
Cultural industry	0,1	0,1	0,1	0,1	0,1
Sports and recreational industry	2,6	2,4	2,7	2,6	2,6
Retail trade of tourism-connected goods	5,4	5,5	5,4	5,3	5,5
Other non-tourism industries	29,5	31,9	31,0	32,3	30,8
Total	100,0	100,0	100,0	100,0	100,0

Individual figures may not add up to stated totals due to rounding

Figure 7: Tourism direct gross value added, 2011–2015 (% contribution)



Source: Statistics South Africa

3.4 Employment in the tourism industries

Tourism employment is the employment strictly related to the goods and services (tourism-connected and non-tourism-connected) acquired by visitors and produced either by tourism industries or other industries that cannot be directly observed¹⁹. South Africa does not have a direct measure of tourism employment. Therefore, employment in the tourism industries includes employment that is directly and/or indirectly related to the goods and services acquired by tourists and non-tourists.

Tables 17a to 17c show employment in the tourism industries by population group for the reference years 2013 to 2015. There were 657 766 persons (or 4,4% of total employment) directly engaged in producing goods and services purchased by visitors in 2013, 679 560 persons (or 4,5% of total employment) in 2014 and 711 746 (or 4,5% of total employment) in 2015. Tourism industry ratios have been used to allocate employment numbers (by industry) to tourism²⁰.

¹⁹ TSA: RMF

²⁰ This treatment assumes that, for each industry, a given rand value of output will require a fixed quantity of labour input, regardless of whether the products are purchased by tourists or non-tourists.

Table 17a: Employment in the tourism industries by population group, 2013 (No. of persons)

Population group	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	90 216	258 169	75 286	432 852	1 185	18 438	9 299	15 198	46 978	38 144	975 580	1 961 345
Coloured	15 846	36 746	8 225	36 166	165	3 842	3 489	4 552	11 935	6 727	163 754	291 447
Indian/Asian	1 350	11 124	508	21 002	1 021	1 461	3 208	1 197	1 292	3 158	76 584	121 904
White	22 686	41 897	12 638	37 904	1 906	11 996	4 130	4 302	24 208	15 012	161 234	337 914
Total	130 097	347 936	96 656	527 924	4 277	35 737	20 127	25 249	84 412	63 041	1 377 152	2 712 610
Tourism industry ratio (%)	79,0	37,0	7,0	37,0	46,0	89,0	65,0	98,0	19,0	27,0	9,0	
Tourism employment												
Black African	71 677	95 273	5 270	160 270	541	16 438	6 076	14 894	8 929	10 319	84 269	473 957
Coloured	12 589	13 560	576	13 391	75	3 426	2 280	4 461	2 268	1 820	14 145	68 592
Indian/Asian	1 072	4 105	36	7 776	466	1 303	2 096	1 173	246	854	6 615	25 742
White	18 024	15 462	885	14 035	870	10 695	2 699	4 216	4 601	4 061	13 927	89 474
Total	103 363	128 401	6 766	195 472	1 953	31 861	13 151	24 744	16 045	17 055	118 956	657 766

Individual figures may not add up to stated totals due to rounding.
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2013*

Table 17b: Employment in the tourism industries by population group, 2014 (No. of persons)

Population group	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	114 508	291 449	62 869	434 203	729	24 037	5 085	18 471	50 038	40 415	952 859	1 994 664
Coloured	12 183	34 961	9 330	41 764	438	4 105	5 088	3 753	9 665	5 735	175 990	303 012
Indian/Asian	2 264	12 819	1 460	15 564	-	-	943	2 352	4 454	1 735	90 280	131 871
White	16 073	33 590	14 436	30 940	886	10 918	772	6 170	23 454	14 246	172 586	324 071
Total	145 027	372 819	88 095	522 471	2 053	39 061	11 888	30 747	87 611	62 131	1 391 715	2 753 618
Tourism industry ratio (%)												
	80,0	37,0	7,0	37,0	44,0	89,0	65,0	98,0	18,0	27,0	9,0	
Tourism employment												
Black African	91 134	107 476	4 375	160 421	322	21 385	3 323	18 110	9 084	10 886	83 034	509 550
Coloured	9 696	12 892	649	15 430	194	3 652	3 325	3 680	1 755	1 545	15 336	68 154
Indian/Asian	1 802	4 727	102	5 750	-	-	617	2 306	808	467	7 867	24 447
White	12 792	12 387	1 005	11 431	392	9 713	504	6 050	4 258	3 837	15 040	77 409
Total	115 424	137 483	6 131	193 032	909	34 750	7 768	30 146	15 904	16 735	121 277	679 560

Individual figures may not add up to stated totals due to rounding.

Source: Statistics South Africa, *Quarterly Labour Force Survey, 2014*

Table 17c: Employment in the tourism industries by population group, 2015 (No. of persons)

Population group	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	121 470	305 175	60 293	450 832	1 235	20 872	12 016	17 890	47 252	48 602	931 283	2 016 920
Coloured	21 606	27 695	4 674	40 537	873	3 922	1 039	4 306	14 956	9 452	152 007	281 066
Indian/Asian	5 250	12 318	1 754	16 861	964	1 981	1 219	2 170	4 948	3 016	72 989	123 472
White	22 376	38 264	10 829	38 525	1 231	8 885	1 486	5 349	26 330	18 174	146 364	317 811
Total	170 701	383 452	77 549	546 755	4 303	35 661	15 760	29 715	93 486	79 243	1 302 644	2 739 268
Tourism industry ratio (%)	80,0	37,0	7,0	37,0	47,0	89,0	65,0	98,0	18,0	27,0	9,0	
Tourism employment												
Black African	96 590	112 559	4 041	167 696	581	18 576	7 849	17 540	8 654	12 954	81 909	528 950
Coloured	17 181	10 215	313	15 078	410	3 491	679	4 222	2 739	2 519	13 369	70 217
Indian/Asian	4 174	4 543	118	6 272	453	1 763	797	2 128	906	804	6 420	28 378
White	17 793	14 113	726	14 330	579	7 907	971	5 244	4 822	4 844	12 873	85 202
Total	135 737	141 431	5 198	203 376	2 024	31 737	10 295	29 134	17 122	21 121	114 571	711 746

Individual figures may not add up to stated totals due to rounding.
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2015*

Chapter 4: The future development of the Tourism Satellite Account for South Africa

In accordance with the recommendations set out by the 2008 TSA: RMF, the South African TSA for the reference years 2013 to 2015 focused on the compilation of Tables 1–7 and Table 10.

The next TSA report for South Africa will be the result for the reference years 2014 to 2016, and is scheduled to be published by the end of March 2018. To ensure that future TSAs in South Africa are responsive to user needs and provide an accurate reflection of the tourism industry as well as its role in the economy, all stakeholders are invited to send comments to Kevin Geddes: KevinG@statssa.gov.za.

Annexures

Annexure A: Tourism-characteristic products

The list of tourism-characteristic products (goods and services) corresponds with products (goods and services) considered characteristic for purposes of the international comparability of results. Consequently, it is meant to serve as a proposal of how, in future, the various international organisations could present, in a comparable way, the results of countries that have developed a TSA.

In coding the various items, six-digit codes, with a point between the fifth and sixth digits, were used. The first five digits correspond to the Central Product Classification (CPC), Version 2.0 code, and the sixth digit is used exclusively for the present list. If the sixth digit is a zero, it means that this item is the same as the one presented in the CPC, Version 2.0 and has been drawn from it, but if the sixth digit is not a zero, the item corresponds only partly to the CPC code. For example, code 63110.0, 'Hotel and motel lodging services', is identical to CPC code 63110, whereas code 63199.1, 'Sleeping-car....', corresponds only in part to CPC code 63199.

1. Accommodation services

1.1 Hotels and other lodging services

63110.0	Hotel and motel lodging services
63191.0	Holiday centre and holiday home services
63192.0	Letting services of furnished accommodation
63193.0	Youth hostel services
63194.0	Children's training and holiday camp services
63195.0	Camping and caravanning site services
63199.1	Sleeping-car and similar services in other transport media; residence of students

1.2 Second-home services on own account or for free

This subclass includes the imputed rent on owned second homes or for-free and time-share apartments. There is no code in CPC with this information.

72211.1	Support services to time-share activities
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2. Food and beverage-serving services

63210.0	Meal-serving services with full restaurant services
63220.0	Meal-serving services in self-service facilities
63290.0	Other food-serving services
63300.0	Beverage-serving services for consumption on the premises

3. Passenger transport services

3.1 Inter-urban railway transport services

64111.1	Scheduled rail services of passengers
64111.2	Non-scheduled rail services of passengers

3.2 Road transport services

64213.0	Inter-urban scheduled road transport services of passengers
64214.0	Inter-urban special-purpose scheduled road transport services of passengers
64219.1	Scheduled ski-hills services
64219.2	Teleferic-funicular services
64221.0	Taxi services
64222.0	Rental services of passenger cars with operator
64223.0	Rental services of buses and coaches with operator

3.3 Water transport services

65111.0	Coastal and trans-oceanic water transport services of passengers by ferry
65119.1	Scheduled transport services of passengers
65119.2	Non-scheduled transport services of passengers
65119.3	Cruise ship services
65130.1	Personal passenger vessel services
65211.0	Inland water transport services of passengers by ferries
65219.1	Other scheduled inland water transport services of passengers
65219.2	Sightseeing excursion services
65219.3	Cruise services
65230.0	Rental services of inland water vessels with operator

3.4 Air transport services

66110.0	Scheduled air transport services of passengers
66120.1	Non-scheduled air services of passengers
66120.2	Sightseeing services, aircraft or helicopter
66400.0	Rental services of aircraft with operator

3.5 Supporting passenger transport services

67300.0	Navigational aid services
67400.0	Supporting services for railway transport
67510.0	Bus station services
67530.1	Parking of passenger terminal transport
67610.0	Port and waterway services (excluding cargo handling)
67690.1	Vessel fuelling services
67690.2	Maintenance and upkeep services to private recreation passenger services
67710.0	Airport operation services (excluding cargo handling)
67790.0	Other supporting services for air or space transport

3.6 Passenger transport equipment rental

73111.0	Leasing or rental services concerning cars and light vans without operator
73114.1	Leasing or rental services concerning campers/motor without operator
73115.1	Leasing or rental services concerning passenger vessels without operator
73116.1	Leasing or rental services concerning passenger aircraft without operator

3.7 Maintenance and repair services of passenger transport equipment

87143.0	Maintenance and repair services of trailers, semi-trailers and other motor vehicles not elsewhere classified
87149.1	Maintenance and repair services of leisure vessel for own use
87149.2	Maintenance and repair services of leisure aircraft for own use

4. Travel agency, tour operator and tourist guide services

4.1 Travel agency services

67811.0	Travel agency services
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4.2 Tour operator services

67812.0	Tour operator services
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4.3 Tourist information and tourist guide services

67813.0	Tourist information services
67820.0	Tourist guide services

5. Cultural services

5.1 Performing arts

96230.0	Performing arts facility operation services
96310.0	Services of performing artists

5.2 Museum and other cultural services

96411.0	Museum services except for historical sites and buildings
96412.0	Preservation services of historical sites and buildings
96421.0	Botanical and zoological garden services
96422.0	Nature reserve services including wildlife preservation services

6. Recreation and other entertainment services

6.1 Sports and recreational services

96510.0	Sports and recreational sports event promotion and organisation services
96520.1	Golf course services
96520.2	Ski fields
96520.3	Race circuit
96520.5	Recreation park and beach services
96590.1	Risk sport and adventure

6.2 Other amusement and recreational services

96910.1	Theme park services
96910.2	Amusement park services
96910.3	Fair and carnival services
96920.1	Casino services
96920.2	Slot machine services

7. Miscellaneous tourism services

7.1 Financial and insurance services

71100.1	Travel card services
71100.2	Travel loan services
71311.1	Travel life insurance services
71320.1	Travel accident insurance services
71320.2	Travel health insurance services
71334.1	Passengers' aircraft for own use insurance services
71334.2	Passengers' vessel for own use insurance services
71339.1	Travel insurance services
71552.0	Foreign exchange services

7.2 Other rental services

73240.1	Non-motorised land transport equipment leasing or rental services
73240.2	Winter sports equipment leasing or rental services
73240.3	Non-motorised air transport equipment leasing or rental services
73240.4	Water sports and beach equipment leasing or rental services
73240.5	Camping equipment leasing or rental services
73240.6	Saddle-horse leasing or rental services
73290.1	Photographic camera rental services

7.3 Other tourism services

85970.0	Trade fair and exhibition organisation services
97230.4	Spa services
91131.1	Fishing licence services
91131.2	Hunting licence services
91210.1	Passport issuing services
91210.2	Visa issuing services
96620.2	Guide services (mountain, hunting and fishing)
97910.0	Escort services

Annexure B: List of tourism-characteristic activities

Tourism-characteristic activities can be identified as those productive activities whose principal output is characteristic of tourism. As the set of these activities does not comprise a single industry conforming to the SNA definition, the TSA defines tourism industries as all establishments whose principal productive activity is a tourism-characteristic activity.

Table A reveals similarities between the 12 items of the list used in the TSA tables and their corresponding codes in the International Standard Industrial Classification of all Economic Activities (ISIC), Rev. 3 and SICTA.

Table A: List of tourism-characteristic activities

Activity description	ISIC, Rev. 3	SICTA
1. Hotels and similar	5510	5510
2. Second-home ownership (imputed)	Part of 7010	Part of 7010
3. Restaurants and similar	5520	5520
4. Railway passenger transport services	Part of 6010	6010-1, 6010-2
5. Road passenger transport services	Part of (6021 and 6022)	6021-1, 6021-2, 6021-3, 6022-1, 6022-2, 6022-3, 6022-4
6. Water passenger transport services	Part of (6110 and 6120)	6110-1, 6110-2, Part of 6110, 6120-1, 6120-2, 6120-3, Part of 6120
7. Air passenger transport services	Part of (6210 and 6220)	6210-1, 6220-1, 6220-2
8. Transport supporting services	Part of 6303	6303-1, 6303-2, 6303-3
9. Transport equipment rental	Part of (7111, 7112 and 7113)	7111-1, 7111-2, 7111-3 Part of 7112, 7113-1
10. Travel agencies and similar	6304	6304
11. Cultural services	9232, 9233	9232-1, 9232-2, 9233-1, 9233-2
12. Sporting and other recreational services	Part of 9214 Part of 9241 Part of 9219 Part of 9249	Part of 9214 Part of 9241 9219-1 Part of 9249

Annexure C: Tourism Satellite Account non-monetary indicators

Table 10 of the TSA presents a few quantitative non-monetary indicators, which are important for the interpretation of the monetary information presented. The 1993 SNA states explicitly that physical indicators are an important component of satellite accounts and therefore should be viewed as a secondary part of the TSA²¹. The UNWTO, however, states that further work would be required to improve the link between the provisional list of non-monetary indicators and the monetary tables.

Table B1: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2013 ('000)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Same-day		Total visitors	Same-day		Total visitors	Same-day		Total visitors
	Tourists	visitors		Tourists	visitors		Tourists	visitors	
Number of trips or visits (*)	-	-	-	25 175	253 467	278 642	-	-	-
Number of bednights	-	-	-	-	-	-	-	-	-

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

Table B2: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2014 ('000)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Same-day		Total visitors	Same-day		Total visitors	Same-day		Total visitors
	Tourists	visitors		Tourists	visitors		Tourists	visitors	
Number of trips or visits (*)	-	-	-	28 014	258 253	286 267	-	-	-
Number of bednights	-	-	-	-	-	-	-	-	-

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

Table B3: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2015 ('000)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Same-day		Total visitors	Same-day		Total visitors	Same-day		Total visitors
	Tourists	visitors		Tourists	visitors		Tourists	visitors	
Number of trips or visits (*)	-	-	-	24 451	224 452	248 903	-	-	-
Number of bednights	-	-	-	-	-	-	-	-	-

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

²¹ TSA: RMF

Table C: TSA Table 10b – Number of trips and overnights by mode 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 modes of air transport		
2. Waterway		
2.1 Passenger line and ferry		
2.2 Cruise ship		
2.3 Yacht		
2.4 Other modes of water transport		
3. Land		
3.1 Railway		
3.2 Motor coach or bus and other public road transportation		
(i) taxis, limousines and rental of private motor vehicle with driver		
(ii) rental of main or animal-drawn vehicle		
3.3 Owned private vehicle (with capacity up to 8 persons)		
3.4 Vehicle rental without operator (up to 8 persons)		
3.5 Other modes of land transport (horseback, bicycle, motorcycle, etc.)		
3.6 On foot		
Total		

Table D1: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2013

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 651	7 032	-	-
Capacity (stay units)	62 500	55 500	-	-
Stay unit nights sold	12 892 300	8 970 400	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	56,5%	48,4%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D2: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2014

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 679	7 047	-	-
Capacity (stay units)	62 800	56 000	-	-
Stay unit nights sold	13 141 000	9 617 500	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	57,3%	50,2%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D3: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2015

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 725	7 105	-	-
Capacity (stay units)	63 100	57 000	-	-
Stay unit nights sold	13 034 400	9 402 500	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	56,6%	50,3%	-	-
Capacity utilisation (beds)	-	-	-	-

Table E: TSA Table 10d – Number of establishments in tourism industries classified according to average number of employed persons

	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	>1000	Total
1 – Accommodation for visitors										
1.a – Accommodation services for visitors other than 1.b										
1.b – Accommodation services associated with all types of vacation home ownership										
2 – Food and beverage serving industry										
3 – Railway passenger transport										
4 – Road passenger transport										
5 – Water passenger transport										
6 – Air passenger transport										
7 – Transport equipment rental										
8 – Travel agencies and other reservation services										
9 – Cultural industry										
10 – Sports and recreational industry										
11 – Retail trade of country-specific tourism characteristic goods										
12 – Country-specific tourism industries										
Total establishments										

Glossary

Domestic tourism	The tourism of resident visitors within the economic territory of the country of reference.
Domestic tourism consumption	Domestic tourism consumption is the consumption of domestic tourism; that is, the consumption incurred as a direct result of resident visitors travelling within their country of residence. These purchases might include goods or even services produced abroad or by non-residents but sold within the domestic economy (imported goods and services).
Household final consumption expenditure	Household final consumption expenditure 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 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.
Inbound tourism	Inbound tourism comprises the tourism of non-resident visitors within the economic territory of the country of reference.
Inbound tourism consumption	Inbound tourism consumption is the consumption of inbound tourism; that is, the consumption incurred as a direct result of non-resident visitors travelling to and within the given country. It is limited to purchases from providers resident in the given country. The goods purchased within the given country might have been imported by the given country.
Internal tourism	Internal tourism comprises the tourism of visitors, both resident and non-resident, within the economic territory of the country of reference. Internal tourism comprises domestic tourism and inbound tourism.
Internal tourism consumption	Internal tourism consumption is the consumption of internal tourism; that is, it comprises all consumption expenditure of visitors both resident and non-resident visiting the given country (compiling economy). It is the sum of domestic tourism consumption and inbound tourism consumption. It might include goods and services imported into the country and domestically sold to visitors.
International tourism	International tourism comprises inbound tourism and outbound tourism.

International tourism consumption	International tourism consumption comprises inbound tourism consumption and outbound tourism consumption.
National tourism	National tourism comprises the tourism of resident visitors, within and outside the economic territory of the country of reference. National tourism is the tourism by residents; that is, it comprises domestic tourism and outbound tourism.
National tourism consumption	National tourism consumption comprises all tourism consumption by resident visitors regardless of where it occurs. It includes all domestic tourism consumption and outbound tourism consumption by residents of the given country (compiling economy). These purchases may include nationally produced goods and services, imported goods purchased from resident providers, and goods and services purchased from non-resident providers, such as in countries visited.
Outbound tourism	Outbound tourism comprises the tourism of resident visitors outside the economic territory of the country of reference.
Outbound tourism consumption	Outbound tourism consumption is the consumption of outbound tourism; that is, the consumption incurred as a direct result of residents travelling to countries other than the one in which they reside. While most of this consumption happens outside the given country (compiling economy), such purchases might include goods and services produced in the visitor's country of residence and acquired for the trip. Purchases of international transportation are included in their entirety regardless of the residence of the carrier.
Tourism	Tourism comprises 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.
Tourism-characteristic activities	Tourism-characteristic activities are those productive activities that have tourism-characteristic products as their principal output. The sum of all tourism-characteristic activities comprises the tourism industries.
Tourism-characteristic products	Tourism-characteristic products are those which, in most countries, would cease to exist in meaningful quantity or those of which the consumption would be significantly reduced in the absence of tourism, and for which statistical information seems possible to obtain.
Tourism-connected products	Tourism-connected products are those products which are consumed by visitors in volumes which are significant for the visitor and/or the provider but which are not included in the list of tourism-characteristic products.
Tourism-connected activities	Tourism-connected activities are those productive activities having as their principal output tourism-connected products.

Tourism consumption	Tourism consumption is the total consumption expenditure made by a visitor or on behalf of a visitor for and during his/her trip and stay at their destination.
Tourism demand	Tourism demand is the sum of the tourism consumption, the tourism collective consumption and tourism gross fixed capital formation.
Tourism expenditure	Tourism expenditure is the acquisition of goods and services by visitors or by others for their benefit through a monetary transaction for the direct satisfaction of their wants and needs for and during their stay at their destination.
Tourism gross domestic product	Tourism GDP is the GDP generated in the economy by the tourism industries and other industries in response to tourism internal consumption.
Tourism industry	A tourism industry consists of a set of establishments whose principal productive activity is a tourism-characteristic activity.
Tourism internal consumption	Tourism internal consumption comprises all tourism consumption expenditure that takes place within the given country (compiling economy). It includes all domestic tourism consumption, inbound tourism consumption, and the part of outbound tourism consumption which corresponds to goods and services provided by residents. It might include goods and services imported into the economy and domestically sold to visitors. It differs from internal tourism consumption by the part of outbound tourism consumption which corresponds to goods and services provided by residents.
Tourism non-specific products	Tourism non-specific products are all other products which are not tourism-specific.
Tourism sector	The tourism sector consists of the set of institutional units whose principal economic activity is a tourism-characteristic activity. These units might belong to the following institutional sectors: households, non-financial corporations (private, foreign owned, publicly owned), financial corporations, general government or non-profit institutions serving households.
Tourism-specific products	Tourism-specific products consist of the set of tourism-characteristic products and tourism-connected products.
Tourism value added	Tourism value added is defined as the value added generated in the economy by the tourism industries and other industries in response to tourism internal consumption.

Traveller	A traveller is any person on a trip between two or more countries, or between two or more localities within his/her country of usual residence.
Usual environment	To be outside the 'usual environment' the person should travel more than 40 kilometres from his/her place of residence (one way) AND the place should NOT be visited more than once a week. This includes place of work and place of study. Leisure and recreational trips are included irrespective of frequency.
Visitor	A visitor is any person travelling to a place other than that of his usual environment for less than 12 months and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited.
Visitors' expenditures	Visitors' expenditures are traditionally used in the analysis of tourism economy. They include expenditures on goods and services consumed by visitors for and during their trips and stay at destinations. It corresponds with the monetary transactions component of tourism consumption.

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