

National Accounts



Satellite Accounts

Tourism Satellite Account for South Africa, final 2010 and provisional 2011 and 2012

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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 Organisation
VA	Value added
VAT	Value added tax

Preface

The Tourism Satellite Account (TSA), final 2010 and provisional 2011 and 2012 covers updated and new provisional figures for the reference years 2011 and 2012 as well as the final results for 2010. 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 both in terms of expenditure and employment.

The TSA for South Africa is compiled and published by Statistics South Africa (Stats SA) according to the framework (Tourism Satellite Account: Recommended Methodological Framework [TSA: RMF]) developed by the United Nations World Tourism Organisation (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 beverages statistics.

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March 2014

Key Findings

The key findings of the Tourism Satellite Account for South Africa for 2008 to 2012 are:

	2008(f)	2009(f)	2010(f)	2011(p)	2012(p)
Inbound tourism expenditure (R million)	69 963	67 141	69 422	71 747	85 423
Outbound tourism expenditure (R million)	56 317	53 553	59 452	60 545	58 588
Tourism trade balance with the rest of the world (R million)	13 646	13 588	9 970	11 202	26 835
Domestic tourism expenditure (R million)	76 553	82 684	92 235	100 715	105 638
Internal tourism expenditure (R million)	146 517	149 825	161 657	172 462	191 061
Tourism direct gross value added (TDGVA) (R million)	62 115	64 271	71 051	76 964	86 282
Tourism direct gross value added (TDGVA) (%)	3,1	3,0	2,9	2,9	3,1
Tourism direct gross domestic product (TDGDP) (R million)	67 147	69 289	76 560	83 514	93 294
Tourism direct gross domestic product (TDGDP) (%)	3,0	2,9	2,9	2,8	3,0
Persons directly engaged in producing goods and services purchased by visitors (nr)	606 934	553 990	567 313	591 785	617 287
Persons directly engaged in producing goods and services purchased by visitors (%)	4,4	4,1	4,3	4,5	4,6

(f) Final

(p) Preliminary

Tourism direct gross domestic product was R67 147 million (or 3,0% of total gross domestic product) for 2008, R69 289 million (or 2,9% of total gross domestic product) for 2009, R76 560 million (or 2,9% of total gross domestic product) in 2010, R83 514 million (or 2,8% of total gross domestic product) in 2011, and R93 294 million (or 3,0% of total gross domestic product) in 2012.

The year 2012 saw 13 069 034 non-resident visitors to South Africa compared with 12 097 490 non-resident visitors for 2011, 11 303 087 non-resident visitors for 2010, 9 531 615 non-resident visitors for 2009 and 9 407 314 non-resident visitors for 2008.

There were 606 934 persons (or 4,4% of total employment) directly engaged in producing goods and services purchased by visitors in 2008, 553 990 persons (or 4,1% of total employment) in 2009, 567 313 persons (or 4,3% of total employment) in 2010, 591 785 (or 4,5% of total employment) in 2011 and 617 287 (or 4,6 % of total employment) in 2012.

Inbound tourism expenditure totalling R69 963 million was recorded in 2008. The main expenditure items were 'non-specific products' (33,2%), 'accommodation for visitors' (13,9%) and 'road passenger transport services' (12,1%). Inbound tourism expenditure totalling R85 423 million was recorded in 2012. The main expenditure items were 'non-specific products' (22,5%), 'connected products' (16,6%), 'accommodation for visitors' (15,7%) and 'road passenger transport services' (12,5%).

Domestic tourism expenditure totalling R76 553 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2008. The main expenditure items were 'road passenger transport services' (33,1%), 'accommodation for visitors' (19,3%) and 'non-specific products' (12,1%). Domestic tourism expenditure totalling R105 638 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2012. The main expenditure items were 'road passenger transport services' (31,5%), 'accommodation for visitors' (17,4%), 'air passenger transport services' (14,5%) and 'non-specific products' (11,9%).

The total internal tourism consumption in cash for South Africa in 2008 was R146 517 million (inbound tourism consumption R69 963 million [48,0%] and domestic tourism consumption R76 553 million [52,0%]). The main expenditure items for internal tourism were 'road passenger transport services' (23,0%), 'non-specific products' (22,2%), 'accommodation for visitors' (16,7%) and 'tourism-connected products' (10,9%).

The total internal tourism consumption in cash for South Africa in 2012 was R191 061 million (inbound tourism consumption R85 423 million [45,0%] and domestic tourism consumption R105 638 million [55,0%]). The main expenditure items for internal tourism were 'road passenger transport services' (23,0%), 'accommodation for visitors' (16,7%) and 'non-specific products' (16,7%).

Chapter 1: Introduction

The United Nations World Tourism Organisation (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 during the last decades. However, statistical information on the nature, progress and consequences of tourism in South Africa is mainly based on arrivals and overnight stay statistics, Balance of Payments (BoP) information and South African Tourism (SAT) surveys, which do not grasp the whole economic phenomenon of tourism. Consequently, government, businesses and citizens may not receive accurate information that is necessary for effective public policies and efficient business operations.

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

The tourism sector is not measured as a sector in its own right in 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 the tourists. Furthermore, tourism consumption includes 'tourism-characteristic' (i.e. accommodation, travel services, cable cars, etc.) and 'non-tourism-related' (i.e. retail trade) goods and services, which deliver their services largely to non-tourists. The key factor, to measure 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 will provide 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 of the Tourism Satellite Account with the 1993 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, which 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.

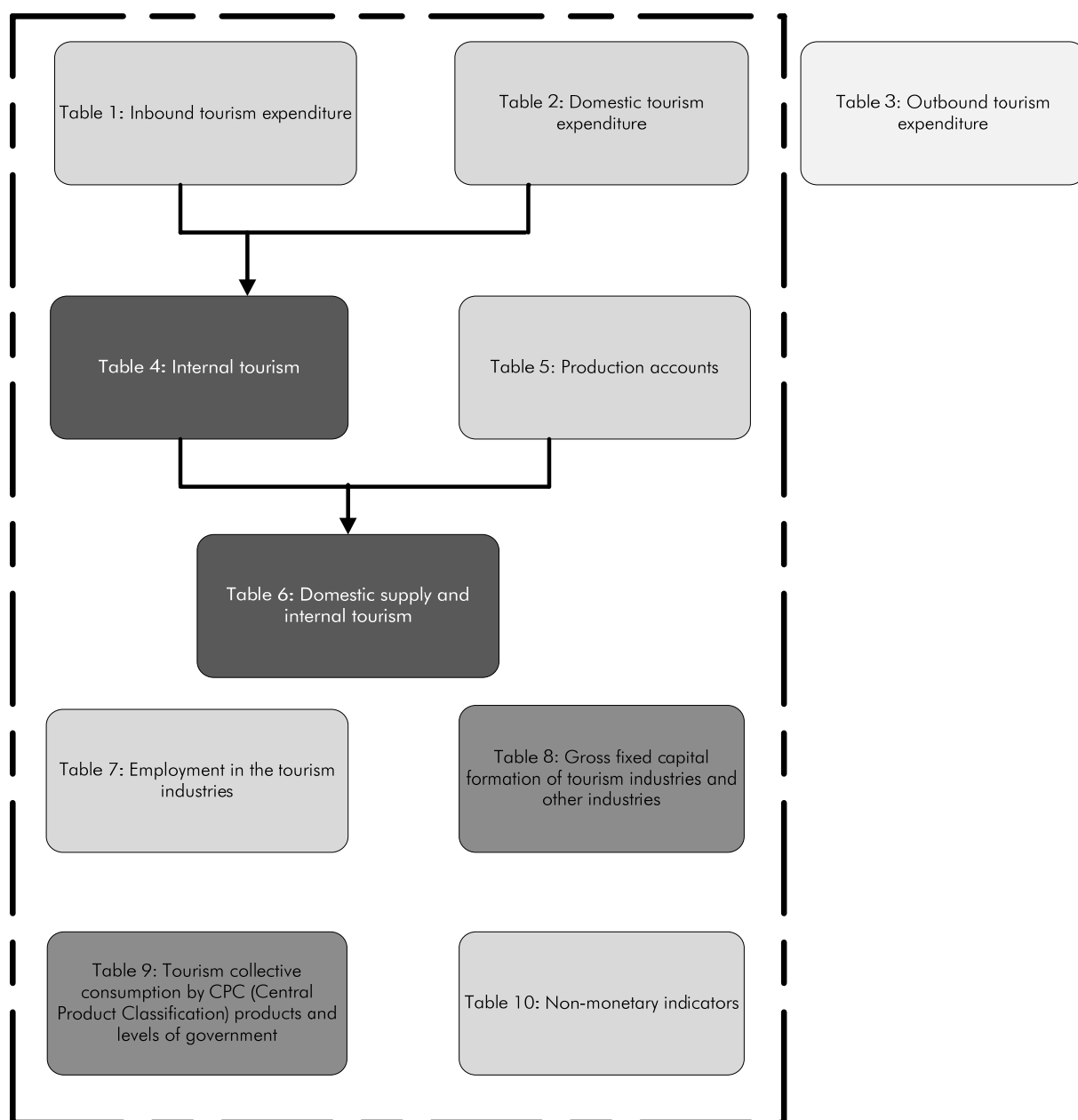
The fundamental structure of a TSA is based on the general relationship existing within an economy between the demand for goods and services generated by tourism on the one hand, and their supply on the other hand, and as such provides a framework for policy analysis of issues related to tourism economics,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

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

provide a measure of the importance of tourism in terms of gross domestic product (GDP), expenditures and 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 2010 and provisional 2011 to 2012 provides a coherent framework from within which to integrate and analyse economic statistics related to tourism activity both from 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 2005 to 2012, in Microsoft Excel spreadsheets, are released with the March 2014 report on the TSA for South Africa, downloadable from www.statssa.gov.za.

Chapter 2: Data sources

This section looks at the data sources used in the compilation of the TSA for South Africa.

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 annual 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 the 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	January 2013 (reference period – October 2012)	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	January 2013 (2012)	Annually	31 027 households
SU-tables	Yes	Reference period 2012 (10x10) Reference period 2012 (64x104) Reference period 2005 (171x104)	Annually Annually Periodically	Entire economy

³ TSA: RMF

⁴ Correct on 4 February 2014.

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 2013 (reference period – 2011/2012)	Annually	General government
Tourist accommodation survey	Yes	January 2014 (reference period – November 2013)	Monthly	1 000 enterprises sampled
Survey of food and beverages	Yes	January 2014 (reference period – November 2013)	Monthly	900 enterprises sampled
Large sample survey (LSS) on accommodation	Yes	November 2013 (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 the transport industry	Yes	November 2011 (reference period 2010)	Every 3 years	2 162 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	December 2013 (reference period – 2012)	Every 3 years	Wholesale: 3 000 enterprises sampled Retail: 3 009 enterprises sampled
Annual Financial Statistics (AFS) ⁵	Yes	November 2013 (reference period – 2012)	Annually	13 121 enterprises sampled
SU-tables	Yes	Reference period 2012 (10x10) Reference period 2012 (64x104) Reference period 2005 (171x104)	Annually 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	2012	44 400 people
Domestic survey	Monthly	2012	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 national accounts. One of the many other uses of the SU-tables is that they can be extended to satellite accounts (accounts linking the 1993 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 exist 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 2010 and provisional 2011 and 2012

This chapter reviews the results of the TSA for South Africa for the reference years 2010 (final) as well as 2011 and 2012 (provisional).

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. Tourism is also one of the two sectors identified as special priority in the Accelerated and Shared Growth Initiative for South Africa (AsgiSA). 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 or by others for their benefit 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 2010 to 2012.

*Tourism product ratio**

Tourism consumption for 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-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-related product, visitors must purchase more than 0 per cent and less than 25 per cent of its production (that is, a tourism-related product has a tourism product ratio that is greater than 0 and less than 0,25).
3. A *non-tourism-related 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 purpose 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, South Africa, 2010

Product	Domestic demand	International demand (exports)	Total demand	Total domestic supply	Tourism product ratio*	Tourism spending abroad (imports)
	(1)	(2)	(3) = (1)+(2)	(4)	(5) = (3)/(4)	(6)
	R million				Percentage	R million
Characteristic products	73 077	44 441	117 517	231 380	50,8	-
Accommodation services	17 364	11 331	28 694	30 079	95,4	-
Restaurants and similar	5 265	7 478	12 742	35 582	35,8	-
Passenger transport services	44 019	18 893	62 911	134 883	46,6	-
<i>Railway passenger transportation services</i>	232	92	324	4 607	7,0	-
<i>Road passenger transportation services</i>	29 188	9 457	38 644	104 203	37,1	-
<i>Water passenger transportation services</i>	7	2	9	15	59,3	-
<i>Air passenger transportation services</i>	12 622	8 310	20 932	21 753	96,2	-
<i>Transport equipment rental</i>	1 969	1 033	3 002	4 304	69,7	-
Travel agencies and similar services	3 788	1 592	5 380	5 491	98,0	-
Cultural services	131	138	269	1 267	21,2	-
Sports and recreational services	2 511	5 010	7 521	24 078	31,2	-
Connected products	8 799	9 376	18 175	199 015	9,1	-
Retail sales of food, beverages and tobacco	4 994	5 270	10 265	100 279	10,2	-
Retail sales of textiles, clothing, footwear and leather goods	2 058	2 473	4 531	47 099	9,6	-
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	67	90	157	15 382	1,0	-
Retail sales of household furniture, appliances, articles and equipment	200	870	1 070	22 800	4,7	-
Retail sales of automotive fuel	1 480	673	2 153	13 454	16,0	-
Non-specific products	10 359	15 606	25 964	5 026 154	0,5	-
Services	4 516	4 057	8 573	3 127 346	0,3	-
Goods	5 843	11 548	17 391	1 898 809	0,9	-
Total tourism expenditures	92 235	69 422	161 657	5 456 548	3,0	59 452

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

Table 3b: Tourism expenditure by product, South Africa, 2011

Product	Domestic demand	International demand (exports)	Total demand	Total domestic supply	Tourism product ratio*	Tourism spending abroad (imports)
	(1)	(2)	(3) = (1)+(2)	(4)	(5) = (3)/(4)	(6)
	R million				Percentage	R million
Characteristic products	79 948	45 625	125 572	247 240	50,9	-
Accommodation services	17 876	11 496	29 372	30 789	95,4	-
Restaurants and similar	6 637	7 752	14 389	38 449	37,4	-
Passenger transport services	48 404	19 776	68 180	145 741	46,8	-
<i>Railway passenger transportation services</i>	255	102	357	5 106	7,0	-
<i>Road passenger transportation services</i>	32 001	9 632	41 632	112 122	37,1	-
<i>Water passenger transportation services</i>	8	2	10	18	53,2	-
<i>Air passenger transportation services</i>	14 148	8 953	23 101	23 963	96,4	-
<i>Transport equipment rental</i>	1 992	1 088	3 079	4 531	68,0	-
Travel agencies and similar services	4 101	1 724	5 825	5 944	98,0	-
Cultural services	160	128	288	1 316	21,9	-
Sports and recreational services	2 769	4 750	7 519	25 001	30,1	-
Connected products	9 507	10 028	19 535	220 460	8,9	-
Retail sales of food, beverages and tobacco	5 092	5 533	10 625	110 105	9,6	-
Retail sales of textiles, clothing, footwear and leather goods	2 484	2 620	5 103	52 976	9,6	-
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	64	104	168	16 940	1,0	-
Retail sales of household furniture, appliances, articles and equipment	159	995	1 154	24 912	4,6	-
Retail sales of automotive fuel	1 708	776	2 484	15 527	16,0	-
Non-specific products	11 261	16 095	27 355	5 441 250	0,5	-
Services	4 943	4 185	9 128	3 410 343	0,3	-
Goods	6 318	11 910	18 228	2 030 936	0,9	-
Total tourism expenditures	100 715	71 474	172 462	5 908 950	2,9	60 545

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

Table 3c: Tourism expenditure by product, South Africa, 2012

Product	Domestic demand	International demand (exports)	Total demand	Total domestic supply	Tourism product ratio*	Tourism spending abroad (imports)
	(1)	(2)	(3) = (1)+(2)	(4)	(5) = (3)/(4)	(6)
	R million				Percentage	R million
Characteristic products	83 181	52 009	135 189	264 060	51,2	-
Accommodation services	18 430	13 389	31 820	33 117	96,1	-
Restaurants and similar	6 177	9 229	15 407	41 304	37,3	-
Passenger transport services	51 003	21 800	72 802	154 309	47,2	-
<i>Railway passenger transportation services</i>	273	110	383	5 510	7,0	-
<i>Road passenger transportation services</i>	33 239	10 678	43 916	117 757	37,3	-
<i>Water passenger transportation services</i>	9	2	11	20	53,4	-
<i>Air passenger transportation services</i>	15 362	9 854	25 217	26 208	96,2	-
<i>Transport equipment rental</i>	2 120	1 155	3 276	4 814	68,0	-
Travel agencies and similar services	4 390	1 845	6 235	6 362	98,0	-
Cultural services	159	154	313	1 448	21,6	-
Sports and recreational services	3 021	5 592	8 613	27 519	31,3	-
Connected products	9 856	14 181	24 037	242 572	9,9	-
Retail sales of food, beverages and tobacco	4 882	8 996	13 877	119 184	11,6	-
Retail sales of textiles, clothing, footwear and leather goods	2 758	3 000	5 758	59 254	9,7	-
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	71	127	198	18 851	1,1	-
Retail sales of household furniture, appliances, articles and equipment	158	1 155	1 313	27 219	4,8	-
Retail sales of automotive fuel	1 987	903	2 890	18 064	16,0	-
Non-specific products	12 601	19 234	31 835	5 837 681	0,5	-
Services	5 405	5 001	10 405	3 701 532	0,3	-
Goods	7 197	14 233	21 430	2 136 149	1,0	-
Total tourism expenditures	105 638	85 423	191 061	6 344 313	3,0	58 588

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

The Tourism Balance of Payments for South Africa

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 back to the imports and exports of tourism goods and services for a calendar year, i.e.:

- Inbound tourism is the exports of tourism goods and services; and
- Outbound tourism is the imports of goods and services.

Table 4 show the Tourism Balance of Payments for South Africa for the reference years 2005 to 2012.

Table 4: The Tourism Balance of Payments for South Africa, 2005 to 2012

Year	Inbound tourism expenditure	R million		Trade balance with the rest of the world
		Outbound tourism expenditure		
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

Source: South African Reserve Bank

3.1.1 Inbound tourism expenditure

Table 5 and Table 6 show inbound tourism expenditure by type of product (R million and percentage contribution).

Inbound tourism expenditure totalling R69 963 million was recorded in 2008. The main expenditure items were 'non-specific products' (33,2%), 'accommodation for visitors' (13,9%) and 'road passenger transport services' (12,1%). Inbound tourism expenditure totalling R85 423 million was recorded in 2012. The main expenditure items were 'non-specific products' (22,5%), 'connected products' (16,6%), 'accommodation for visitors' (15,7%) and 'road passenger transport services' (12,5%).

The year 2012 saw 13 069 034 non-resident visitors to South Africa compared with 12 097 490 non-resident visitors for 2011, 11 303 087 non-resident visitors for 2010, 9 531 615 non-resident visitors for 2009 and 9 407 314 non-resident visitors for 2008.

Table 5: Inbound tourism expenditure by type of product, 2008 to 2012 (R million)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	9 713	11 270	11 331	11 496	13 389
Restaurants and similar services	7 640	7 803	7 478	7 752	9 229
Railway passenger transport services	78	83	92	101	110
Road passenger transport services	8 439	9 846	9 457	9 632	10 678
Water passenger transport services	1	1	2	2	2
Air passenger transport services	6 328	7 539	8 310	8 953	9 854
Transport equipment rental	973	1 004	1 033	1 088	1 155
Travel agencies and other reservation services	1 307	1 453	1 592	1 724	1 845
Cultural services	129	137	138	128	154
Sports and recreational services	3 755	4 153	5 010	4 750	5 592
Tourism-connected products	8 377	8 843	9 376	10 028	14 181
Non-specific products	23 222	15 010	15 606	16 095	19 234
Total	69 963	67 141	69 422	71 747	85 423

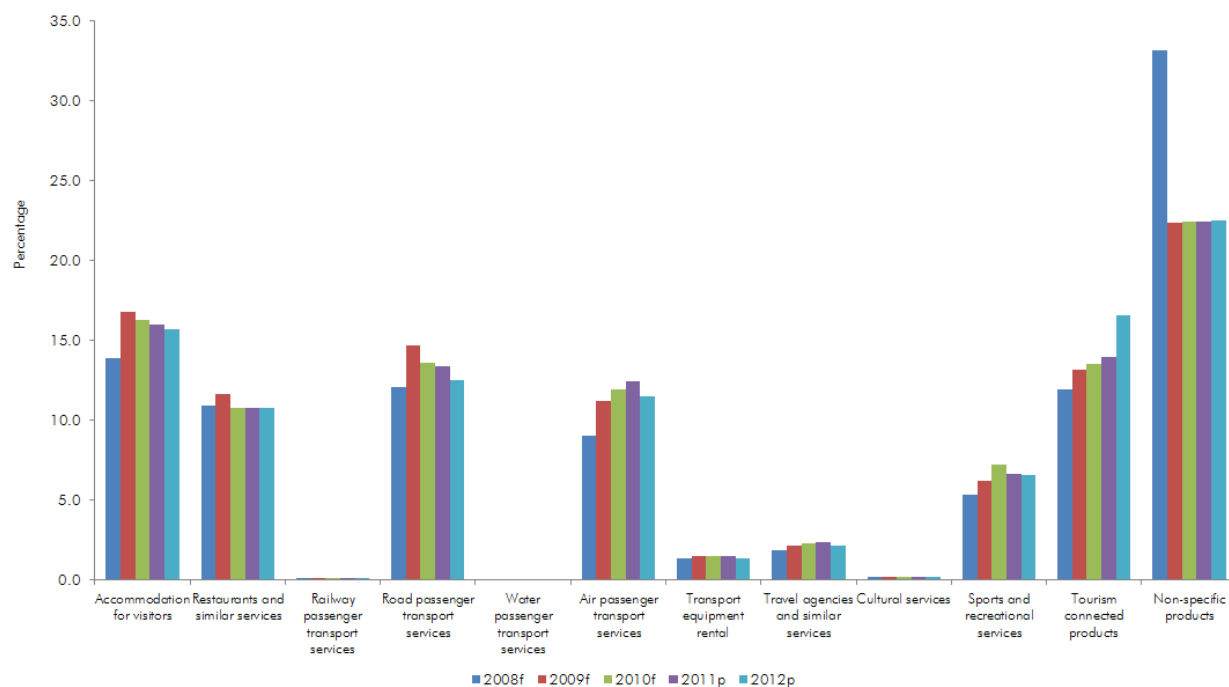
** Individual figures may not add up to stated totals due to rounding.

Table 6: Inbound tourism expenditure by type of product, 2008 to 2012 (%)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	13,9	16,8	16,3	16,0	15,7
Restaurants and similar services	10,9	11,6	10,8	10,8	10,8
Railway passenger transport services	0,1	0,1	0,1	0,1	0,1
Road passenger transport services	12,1	14,7	13,6	13,4	12,5
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	9,0	11,2	12,0	12,5	11,5
Transport equipment rental	1,4	1,5	1,5	1,5	1,4
Travel agencies and other reservation services	1,9	2,2	2,3	2,4	2,2
Cultural services	0,2	0,2	0,2	0,2	0,2
Sports and recreational services	5,4	6,2	7,2	6,6	6,5
Tourism-connected products	12,0	13,2	13,5	14,0	16,6
Non-specific products	33,2	22,4	22,5	22,4	22,5
Total	100,0	100,0	100,0	100,0	100,0

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

Figure 2: Inbound tourism expenditure by type of product (%), 2008 to 2012



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).

Domestic tourism expenditure totalling R76 553 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2008. The main expenditure items were 'road passenger transport services' (33,1%), 'accommodation for visitors' (19,3%) and 'non-specific products' (12,1%). Domestic tourism expenditure totalling R105 638 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2012. The main expenditure items were 'road passenger transport services' (31,5%), 'accommodation for visitors' (17,4%), 'air passenger transport services' (14,5%) and 'non-specific products' (11,9%).

Table 7: Domestic tourism expenditure by type of product, 2008 to 2012 (R million)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	14 779	15 496	17 364	17 876	18 430
Restaurants and similar services	3 470	4 003	5 265	6 637	6 177
Railway passenger transport services	196	207	232	255	273
Road passenger transport services	25 318	26 255	29 188	32 001	33 239
Water passenger transport services	6	6	7	8	9
Air passenger transport services	9 202	10 866	12 622	14 148	15 362
Transport equipment rental	1 713	1 807	1 969	1 992	2 120
Travel agencies and other reservation services	3 109	3 458	3 788	4 101	4 390
Cultural services	76	96	131	160	159
Sports and recreational services	1 809	2 133	2 511	2 769	3 021
Tourism-connected products	7 582	8 396	8 799	9 507	9 856
Non-specific products	9 295	9 961	10 359	11 261	12 601
Total	76 553	82 684	92 235	100 715	105 638

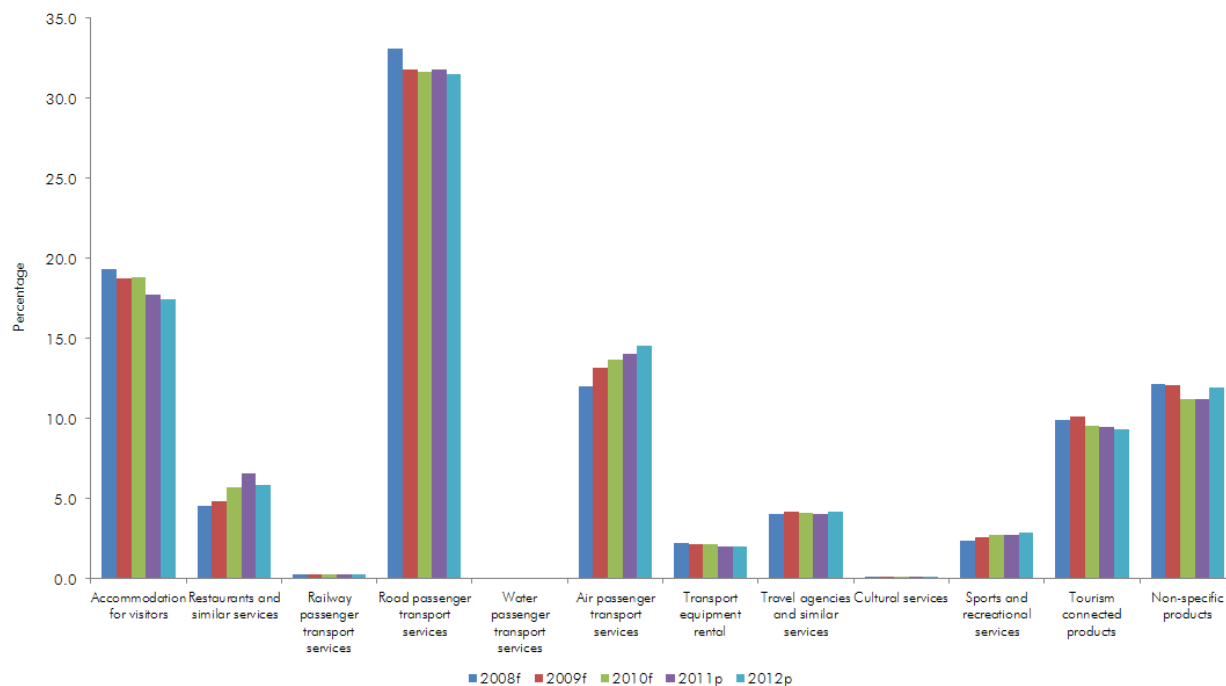
** Individual figures may not add up to stated totals due to rounding.

Table 8: Domestic tourism expenditure by type of product, 2008 to 2012 (%)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	19,3	18,7	18,8	17,7	17,4
Restaurants and similar services	4,5	4,8	5,7	6,6	5,8
Railway passenger transport services	0,3	0,3	0,3	0,3	0,3
Road passenger transport services	33,1	31,8	31,6	31,8	31,5
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	12,0	13,1	13,7	14,0	14,5
Transport equipment rental	2,2	2,2	2,1	2,0	2,0
Travel agencies and other reservation services	4,1	4,2	4,1	4,1	4,2
Cultural services	0,1	0,1	0,1	0,2	0,2
Sports and recreational services	2,4	2,6	2,7	2,7	2,9
Tourism-connected products	9,9	10,2	9,5	9,4	9,3
Non-specific products	12,1	12,0	11,2	11,2	11,9
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: Domestic tourism expenditure by type of product (%), 2008 to 2012



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).

The total internal tourism consumption in cash for South Africa in 2008 was R146 517 million (inbound tourism consumption R69 963 million [48,0%] and domestic tourism consumption R76 553 million [52,0%]). The main expenditure items for internal tourism were 'road passenger transport services' (23,0%), 'non-specific products' (22,2%), 'accommodation for visitors' (16,7%) and 'tourism-connected products' (10,9%).

The total internal tourism consumption in cash for South Africa in 2012 was R191 061 million (inbound tourism consumption R85 423 million [45,0%] and domestic tourism consumption R105 638 million [55,0%]). The main expenditure items for internal tourism were 'road passenger transport services' (23,0%), 'accommodation for visitors' (16,7%) and 'non-specific products' (16,7%).

Table 9: Internal tourism expenditure by type of product, 2008 to 2012 (R million)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	24 491	26 766	28 694	29 372	31 820
Restaurants and similar services	11 110	11 806	12 742	14 389	15 407
Railway passenger transport services	274	290	324	357	383
Road passenger transport services	33 757	36 100	38 644	41 632	43 916
Water passenger transport services	7	7	9	10	11
Air passenger transport services	15 530	18 404	20 932	23 101	25 217
Transport equipment rental	2 686	2 811	3 002	3 079	3 276
Travel agencies and other reservation services	4 416	4 911	5 380	5 825	6 235
Cultural services	206	232	269	288	313
Sports and recreational services	5 564	6 286	7 521	7 519	8 613
Tourism-connected products	15 958	17 239	18 175	19 535	24 037
Non-specific products	32 518	24 971	25 964	27 355	31 835
Total	146 517	149 825	161 657	172 462	191 061

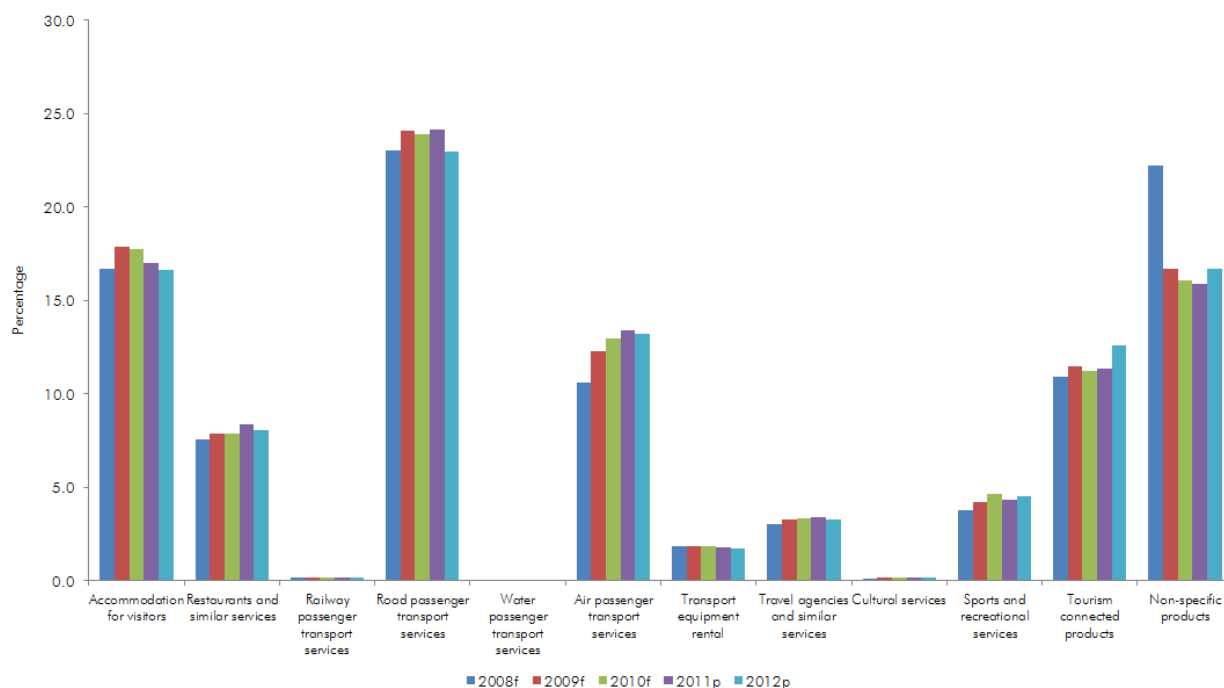
** Individual figures may not add up to stated totals due to rounding.

Table 10: Internal tourism expenditure by type of product, 2008 to 2012 (%)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	16,7	17,9	17,8	17,0	16,7
Restaurants and similar services	7,6	7,9	7,9	8,3	8,1
Railway passenger transport services	0,2	0,2	0,2	0,2	0,2
Road passenger transport services	23,0	24,1	23,9	24,1	23,0
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	10,6	12,3	12,9	13,4	13,2
Transport equipment rental	1,8	1,9	1,9	1,8	1,7
Travel agencies and other reservation services	3,0	3,3	3,3	3,4	3,3
Cultural services	0,1	0,2	0,2	0,2	0,2
Sports and recreational services	3,8	4,2	4,7	4,4	4,5
Tourism-connected products	10,9	11,5	11,2	11,3	12,6
Non-specific products	22,2	16,7	16,1	15,9	16,7
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: Internal tourism expenditure by type of product (%), 2008 to 2012



Source: Statistics South Africa

3.2 Production accounts

Table 5 of the TSA 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 correspond necessarily 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 for 2010 to 2012. 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 R141 672 million (or 5,8% of total GVA generated) in 2010, R155 041 million (or 5,9% of total GVA generated) in 2011 and R169 313 million (or 6,0% of total GVA generated) in 2012.

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), 2010
(R million)

Product	Tourism-characteristic industries	Tourism-related industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	217 723	75 949	136 722	430 394
<i>A.1 Characteristic products</i>	217 723		13 657	231 380
1. Accommodation services	30 079			30 079
1.1 Hotel and other accommodation for visitors other than 1.2	30 079			30 079
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	25 527		10 055	35 582
3. Passenger transport services	131 281		3 602	134 883
3.1 Railway passenger transport services	4 607			4 607
3.2 Road passenger transport services	100 602		3 602	104 203
3.3 Water passenger transport services	15			15
3.4 Air passenger transport services	21 753			21 753
3.5 Passenger transport equipment rental	4 304			4 304
4. Travel agencies and other reservation services	5 491			5 491
5. Cultural industry	1 267			1 267
6. Sports and recreational industry	24 078			24 078
A.2 Connected products		75 949	123 065	199 015
Retail sales of food, beverages and tobacco		31 091	69 188	100 279
Retail sales of textiles, clothing, footwear and leather products		11 775	35 325	47 099
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		10 201	5 181	15 382
Retail sales of household furniture, appliances, articles and equipment		15 081	7 718	22 800
Retail sales of automotive fuel		7 801	5 653	13 454
B. Non-specific products	2 933	6 979	5 016 241	5 026 153
Services	1 453	6 979	3 118 913	3 127 345
Goods	1 480		1 897 328	1 898 809
Total output (at basic prices)	220 656	82 929	5 152 964	5 456 548
Total intermediate consumption (at purchasers' price)	123 506	38 407	2 871 277	3 033 189
Total gross value added (at basic prices)	97 150	44 522	2 281 686	2 423 358
Compensation of employees	30 685	23 974	1 156 703	1 211 361
Taxes less subsidies on production	228	794	31 205	32 227
Gross operating surplus	66 239	19 755	1 093 777	1 179 770

** 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), 2011
(R million)

Product	Tourism-characteristic industries	Tourism-related industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	232 014	83 033	152 652	467 700
<i>A.1 Characteristic products</i>	232 014		15 225	247 240
1. Accommodation services	30 789			30 789
1.1 Hotel and other accommodation for visitors other than 1.2	30 789			30 789
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	27 123		11 326	38 449
3. Passenger transport services	141 842		3 900	145 741
3.1 Railway passenger transport services	5 106			5 106
3.2 Road passenger transport services	108 223		3 900	112 122
3.3 Water passenger transport services	18			18
3.4 Air passenger transport services	23 963			23 963
3.5 Passenger transport equipment rental	4 531			4 531
4. Travel agencies and other reservation services	5 944			5 944
5. Cultural industry	1 316			1 316
6. Sports and recreational industry	25 001			25 001
A.2 Connected products		83 033	137 427	220 460
Retail sales of food, beverages and tobacco		33 288	76 817	110 105
Retail sales of textiles, clothing, footwear and leather products		13 244	39 732	52 976
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		11 113	5 827	16 940
Retail sales of household furniture, appliances, articles and equipment		16 326	8 586	24 912
Retail sales of automotive fuel		9 063	6 464	15 527
B. Non-specific products	3 159	7 650	5 430 441	5 441 250
Services	1 555	7 650	3 401 108	3 410 313
Goods	1 603		2 029 333	2 030 936
Total output (at basic prices)	235 173	90 683	5 583 094	5 908 950
Total intermediate consumption (at purchasers' price)	129 669	41 146	3 103 103	3 273 918
Total gross value added (at basic prices)	105 504	49 537	2 479 991	2 635 032
Compensation of employees	34 217	26 693	1 271 971	1 332 882
Taxes less subsidies on production	830	896	38 969	40 696
Gross operating surplus	70 458	21 948	1 169 048	1 261 454

** 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), 2012
(R million)

Product	Tourism-characteristic industries	Tourism-related industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	247 577	90 369	168 686	506 632
<i>A.1 Characteristic products</i>	247 577		16 483	264 060
1. Accommodation services	33 117			33 117
1.1 Hotel and other accommodation for visitors other than 1.2	33 117			33 117
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	28 984		12 320	41 304
3. Passenger transport services	150 146		4 163	154 309
3.1 Railway passenger transport services	5 510			5 510
3.2 Road passenger transport services	113 594		4 163	117 757
3.3 Water passenger transport services	20			20
3.4 Air passenger transport services	26 208			26 208
3.5 Passenger transport equipment rental	4 814			4 814
4. Travel agencies and other reservation services	6 362			6 362
5. Cultural industry	1 448			1 448
6. Sports and recreational industry	27 519			27 519
A.2 Connected products		90 369	152 203	242 572
Retail sales of food, beverages and tobacco		34 885	84 299	119 184
Retail sales of textiles, clothing, footwear and leather products		14 814	44 441	59 254
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		12 333	6 518	18 851
Retail sales of household furniture, appliances, articles and equipment		17 638	9 580	27 219
Retail sales of automotive fuel		10 699	7 365	18 064
B. Non-specific products	3 356	8 366	5 825 958	5 837 681
Services	1 680	8 366	3 691 486	3 701 532
Goods	1 676		2 134 473	2 136 149
Total output (at basic prices)	250 933	98 735	5 994 645	6 344 313
Total intermediate consumption (at purchasers' price)	136 392	43 964	3 343 696	3 524 052
Total gross value added (at basic prices)	114 542	54 771	2 650 948	2 820 261
Compensation of employees	37 197	28 168	1 389 386	1 454 751
Taxes less subsidies on production	291	1 010	39 688	40 989
Gross operating surplus	77 055	25 594	1 221 872	1 324 521

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

3.3 Domestic supply and internal tourism consumption by product

Table 6 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). The tourism direct gross value added (TDGVA) for South Africa amounted to R71 051 million (or 2,9% of total GVA generated) in 2010, R76 964 million (or 2,9% of total GVA generated) in 2011 and R86 282 million (or 3,1% of total GVA generated) in 2012.

Tables 13a to 13c show the compilation of tourism industry ratios for 2010 to 2012.

*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 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-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 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-related industry.

- 3 A *non-tourism-related industry* is any industry that is not a tourism-characteristic or tourism-related 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, 2010 (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	32 792	5 044	58 574	3 002	5 380	7 790	112 581	6 375	16 736	135 692	
A.1 Characteristic products	32 792	5 044	58 574	3 002	5 380	7 790	112 581		4 937	117 517	
1. Accommodation services	28 694						28 694			28 694	
1.1 Hotel and other accommodation for visitors other than 1.2	28 694										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	4 098	5 044					9 141		3 601	12 742	
3. Passenger transport services			58 574	3 002			61 576		1 336	62 911	
3.1 Railway passenger transport services			324				324			324	
3.2 Road passenger transport services			37 309				37 309		1 336	38 644	
3.3 Water passenger transport services			9				9			9	
3.4 Air passenger transport services			20 932				20 932			20 932	
3.5 Passenger transport equipment rental				3 002			3 002			3 002	
4. Travel agencies and other reservation services					5 380		5 380			5 380	
5. Cultural industry						269	269			269	
6. Sports and recreational industry						7 521	7 521			7 521	
A.2 Connected products								6 375	11 800	18 175	
Retail sales of food, beverages and tobacco								3 182	7 082	10 265	
Retail sales of textiles, clothing, footwear and leather products								1 133	3 398	4 531	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								104	53	157	
Retail sales of household furniture, appliances, articles and equipment								708	362	1 070	
Retail sales of automotive fuel								1 248	905	2 153	
B. Non-specific products	1	1	15		1		18	19	25 928	25 965	
Services	1	1	1		1		5	19	8 550	8 574	
Goods			14				14		17 378	17 391	
Total output (at basic prices)	32 793	5 045	58 588	3 003	5 381	7 790	112 599	6 394	42 664	162 657	5 509
Total intermediate consumption (at purchasers' price)	17 229	3 398	32 539	1 766	3 237	5 704	63 872	2 961	23 773	90 606	
Total gross value added (at basic prices)	15 564	1 647	26 049	1 236	2 143	2 086	48 727	3 433	18 891	71 051	

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

Table 12b: Domestic supply and internal tourism consumption by product, 2011 (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	33 776	5 747	63 652	3 079	5 825	7 807	119 886	6 805	18 417	145 107	
A.1 Characteristic products	33 776	5 747	63 652	3 079	5 825	7 807	119 886		5 687	125 572	
1. Accommodation services	29 372						29 372			29 372	
1.1 Hotel and other accommodation for visitors other than 1.2	29 372						29 372			29 372	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	4 404	5 747					10 151		4 239	14 389	
3. Passenger transport services			63 652	3 079			66 732		1 448	68 180	
3.1 Railway passenger transport services			357				357			357	
3.2 Road passenger transport services			40 184				40 184		1 448	41 632	
3.3 Water passenger transport services			10				10			10	
3.4 Air passenger transport services			23 101				23 101			23 101	
3.5 Passenger transport equipment rental				3 079			3 079			3 079	
4. Travel agencies and other reservation services					5 825		5 825			5 825	
5. Cultural industry						288	288			288	
6. Sports and recreational industry						7 519	7 519			7 519	
A.2 Connected products								6 805	12 730	19 535	
Retail sales of food, beverages and tobacco								3 212	7 413	10 625	
Retail sales of textiles, clothing, footwear and leather products								1 276	3 827	5 103	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								110	58	168	
Retail sales of household furniture, appliances, articles and equipment								756	398	1 154	
Retail sales of automotive fuel								1 450	1 034	2 484	
B. Non-specific products	1	1	16		1		19	20	27 316	27 356	
Services	1	1	1		1		5	20	9 103	9 128	
Goods			14				14		18 213	18 228	
Total output (at basic prices)	33 776	5 748	63 668	3 080	5 826	7 807	119 905	6 825	45 733	172 463	6 549
Total intermediate consumption (at purchasers' price)	18 157	3 758	33 905	1 830	3 492	5 841	66 984	3 097	25 419	95 499	
Total gross value added (at basic prices)	15 619	1 990	29 763	1 250	2 334	1 966	52 922	3 728	20 314	76 964	

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

Table 12c: Domestic supply and internal tourism consumption by product, 2012 (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	36 560	6 071	67 975	3 276	6 235	8 926	129 041	8 194	21 991	159 226	
A.1 Characteristic products	36 560	6 071	67 975	3 276	6 235	8 926	129 041		6 148	135 189	
1. Accommodation services	31 820						31 820			31 820	
1.1 Hotel and other accommodation for visitors other than 1.2	31 820						31 820			31 820	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	4 740	6 071					10 811		4 596	15 407	
3. Passenger transport services			67 975	3 276			71 250		1 553	72 802	
3.1 Railway passenger transport services			383				383			383	
3.2 Road passenger transport services			42 634				42 364		1 553	43 916	
3.3 Water passenger transport services			11				11			11	
3.4 Air passenger transport services			25 217				25 217			25 217	
3.5 Passenger transport equipment rental				3 276			3 276			3 276	
4. Travel agencies and other reservation services					6 235		6 235			6 235	
5. Cultural industry						313	313			313	
6. Sports and recreational industry						8 613	8 613			8 613	
A.2 Connected products								8 194	15 843	24 037	
Retail sales of food, beverages and tobacco								4 062	9 815	13 877	
Retail sales of textiles, clothing, footwear and leather products								1 439	4 318	5 758	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								130	68	198	
Retail sales of household furniture, appliances, articles and equipment								851	462	1 313	
Retail sales of automotive fuel								1 712	1 178	2 890	
B. Non-specific products	1	1	19	1	1		22	24	31 790	31 836	
Services	1	1	2	1	1		6	24	10 377	10 406	
Goods			17				17		21 413	21 430	
Total output (at basic prices)	36 560	6 072	67 993	3 276	6 236	8 926	129 064	8 217	53 781	191 062	7 012
Total intermediate consumption (at purchasers' price)	19 050	3 902	36 019	1 938	3 707	6 508	71 123	3 659	29 998	104 780	
Total gross value added (at basic prices)	17 510	2 171	31 975	1 339	2 528	2 418	57 940	4 558	23 783	86 282	

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

Table 13a: Derivation of tourism industry ratios, 2010

Product	Tourism-characteristic industries										Tourism-related 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	32 792	5 044	324	37 309	9	20 932	3 002	5 380	269	7 521	6 375
A.1 Characteristic products	32 792	5 044	324	37 309	9	20 932	3 002	5 380	269	7 521	
1. Accommodation services	28 694										
1.1 Hotel and other accommodation for visitors other than 1.2	28 694										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	4 098	5 044									
3. Passenger transport services			324	37 309	9	20 932	3 002				
3.1 Railway passenger transport services			324								
3.2 Road passenger transport services				37 309							
3.3 Water passenger transport services					9						
3.4 Air passenger transport services						20 932					
3.5 Passenger transport equipment rental							3 002				
4. Travel agencies and other reservation services								5 380			
5. Cultural industry									269		
6. Sports and recreational industry										7 521	
A.2 Connected products											6 375
Retail sales of food, beverages and tobacco											3 182
Retail sales of textiles, clothing, footwear and leather products											1 133
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											104
Retail sales of household furniture, appliances, articles and equipment											708
Retail sales of automotive fuel											1 248
B. Non-specific products	1	1		13		2					19
Services	1	1		0		1					19
Goods				12		1					
Total purchased by tourists	32 793	5 045	324	37 321	9	20 934	3 002	5 380	269	7 521	6 394
Total industry output	41 801	14 427	4 607	102 091	15	22 255	4 480	5 491	1 274	24 214	82 929
Tourism industry ratio	0,78	0,35	0,07	0,37	0,59	0,94	0,67	0,98	0,21	0,31	0,08

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

Table 13b: Derivation of tourism industry ratios, 2011

Product	Tourism-characteristic industries										Tourism-related 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	33 776	5 747	357	40 184	10	23 101	3 079	5 825	288	7 519	6 805
A.1 <i>Characteristic products</i>	33 776	5 747	357	40 184	10	23 101	3 079	5 825	288	7 519	
1. Accommodation services	29 372										
1.1 Hotel and other accommodation for visitors other than 1.2	29 372										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	4 404	5 747									
3. Passenger transport services			357	40 184	10	23 101	3 079				
3.1 Railway passenger transport services			357								
3.2 Road passenger transport services				40 184							
3.3 Water passenger transport services					10						
3.4 Air passenger transport services						23 101					
3.5 Passenger transport equipment rental							3 079				
4. Travel agencies and other reservation services								5 825			
5. Cultural industry									288		
6. Sports and recreational industry										7 519	
A.2 Connected products											6 805
Retail sales of food, beverages and tobacco											3 212
Retail sales of textiles, clothing, footwear and leather products											1 276
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											110
Retail sales of household furniture, appliances, articles and equipment											756
Retail sales of automotive fuel											1 450
B. Non-specific products	1	1		13			3				20
Services	1	1					1				20
Goods				13			1				
Total purchased by tourists	33 776	5 748	357	40 198	10	23 103	3 079	5 825	288	7 519	6 825
Total industry output	42 848	15 725	5 106	109 832	18	24 516	4 716	5 945	1 323	25 142	90 683
Tourism industry ratio	0,79	0,37	0,07	0,37	0,53	0,94	0,65	0,98	0,22	0,30	0,08

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

Table 13c: Derivation of tourism industry ratios, 2012

Product	Tourism-characteristic industries										Tourism-related 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	36 560	6 071	383	42 364	11	25 217	3 276	6 235	313	8 613	8 194
A.1 <i>Characteristic products</i>	36 560	6 071	383	42 364	11	25 217	3 276	6 235	313	8 613	
1. Accommodation services	31 820										
1.1 Hotel and other accommodation for visitors other than 1.2	31 820										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	4 740	6 071									
3. Passenger transport services			383	42 364	11	25 217	3 276				
3.1 Railway passenger transport services			383								
3.2 Road passenger transport services				42 364							
3.3 Water passenger transport services					11						
3.4 Air passenger transport services						25 217					
3.5 Passenger transport equipment rental							3 276				
4. Travel agencies and other reservation services								6 235			
5. Cultural industry									313		
6. Sports and recreational industry										8 613	
A.2 Connected products											8 194
Retail sales of food, beverages and tobacco											4 062
Retail sales of textiles, clothing, footwear and leather products											1 439
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											130
Retail sales of household furniture, appliances, articles and equipment											851
Retail sales of automotive fuel											1 712
B. Non-specific products	1	1		16			3				24
Services	1	1		1			1				24
Goods				15			2				
Total purchased by tourists	36 560	6 072	383	42 379	11	25 220	3 276	6 235	313	8 613	8 217
Total industry output	46 143	16 674	5 510	115 268	20	26 813	5 010	6 363	1 457	27 675	98 735
Tourism industry ratio	0,79	0,36	0,07	0,37	0,53	0,94	0,65	0,98	0,21	0,31	0,08

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

Tourism direct gross value added and tourism direct gross domestic product

Table 6¹⁵ of the TSA 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 5 explains schematically the link between GDVATI and TDGVA.

Figure 5: Link between gross direct value added of the tourism industries and tourism direct gross value added

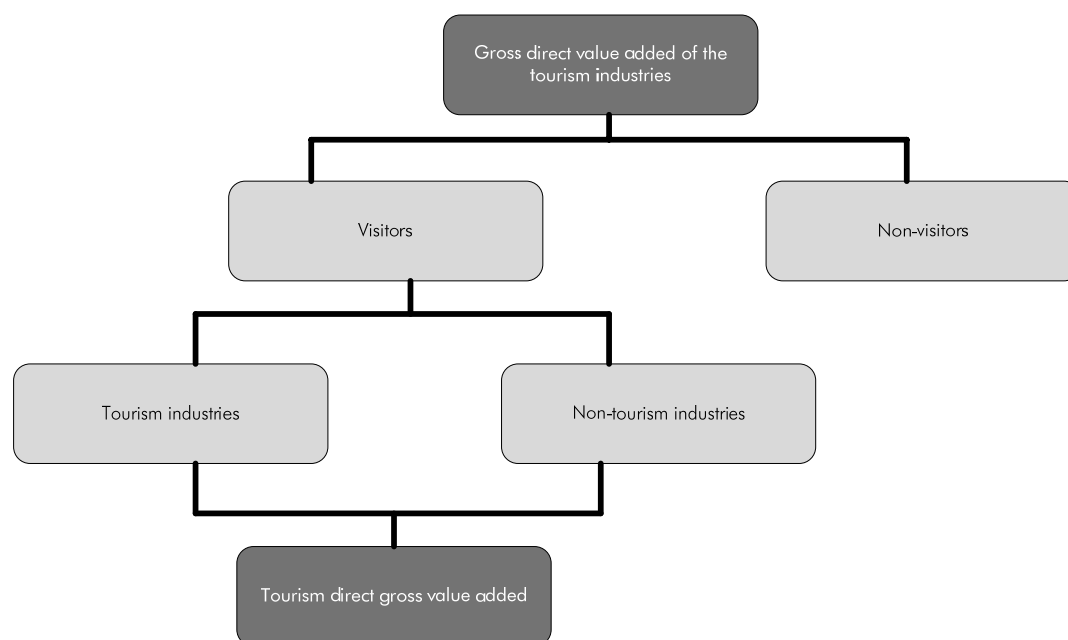


Table 14 shows the calculation of TDGVA and TDGDP for South Africa for 2008 to 2012. TDGDP was R67 147 million (or 3,0% of total GDP) for 2008, R69 289 million (or 2,9% of total GDP) for 2009, R76 560 million (or 2,9% of total GDP) in 2010, R83 514 million (or 2,8% of total GDP) in 2011 and R93 294 million (or 3,0% of total GDP) in 2012.

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, 2008 to 2012

	2008	2009	2010	2011	2012
Total supply of goods and services	5 857 495	5 924 896	6 448 845	7 091 555	7 662 476
Less imports of goods and services	878 737	678 308	741 887	884 908	999 444
Less net taxes (taxes less subsidies) on products	228 733	228 081	250 410	297 697	318 719
Equals total domestic supply of goods and services (output)	4 750 025	5 018 507	5 456 548	5 908 950	6 344 313
Less intermediate consumption	2 722 274	2 840 186	3 033 189	3 273 918	3 524 052
Gross value added of the economy	2 027 751	2 178 321	2 423 358	2 635 032	2 820 261
Total tourism output	146 517	149 825	161 657	172 462	191 061
Less total tourism intermediate consumption	84 403	85 554	90 606	95 499	104 780
Equals tourism direct gross value added (TDGVA)	62 115	64 271	71 051	76 964	86 282
TDGVA (%)	3,1	3,0	2,9	2,9	3,1
Tourism direct gross value added	62 115	64 271	71 051	76 964	86 282
Plus tourism share of net taxes on products	5 032	5 018	5 509	6 549	7 012
Equals tourism direct gross domestic product (TDGDP)	67 147	69 289	76 560	83 514	93 294
TDGDP¹⁸ (%)	3,0	2,9	2,9	2,8	3,0

Table 15 and Table 16 show TDGVA for 2008 to 2012 (R million and percentage contribution).

Table 15: Tourism direct gross value added, 2008 to 2012 (R million)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	13 724	14 785	15 564	15 619	17 510
Food and beverages serving industry	1 490	1 672	1 647	1 990	2 171
Railway passenger transport	167	175	204	230	246
Road passenger transport	16 083	16 877	18 752	20 737	22 150
Water passenger transport	3	3	3	4	5
Air passenger transport	3 945	5 669	7 090	8 792	9 574
Transport equipment rental	1 140	1 158	1 236	1 250	1 339
Travel agencies and other reservation services industry	1 612	1 933	2 143	2 334	2 528
Cultural industry	39	51	72	73	85
Sports and recreational industry	1 052	1 377	2 014	1 893	2 333
Retail trade of tourism-connected goods	2 832	2 976	3 433	3 728	4 558
Other non-tourism industries	20 026	17 595	18 891	20 314	23 783
Total	62 115	64 271	71 051	76 964	86 282

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

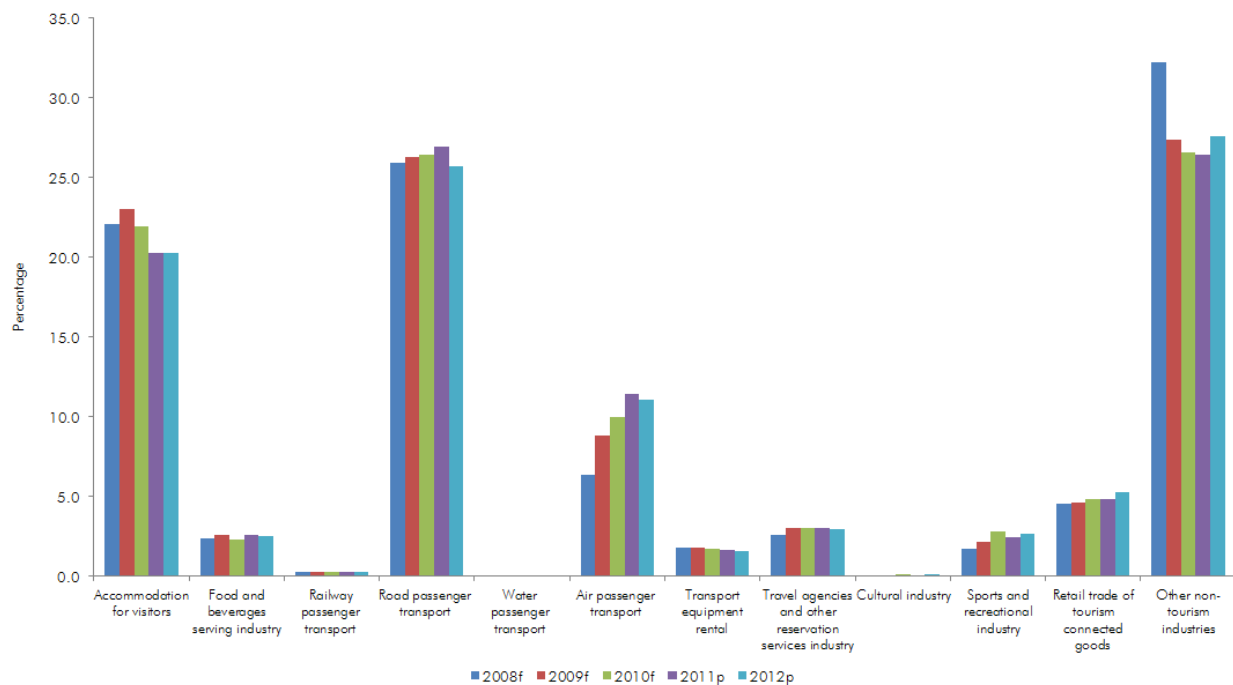
¹⁸ Gross domestic product is equal to gross value added plus net taxes on products.

Table 16: Tourism direct gross value added, 2008 to 2012 (%)

Tourism product	2008	2009	2010	2011	2012
Accommodation for visitors	22,1	23,0	21,9	20,3	20,3
Food and beverages serving industry	2,4	2,6	2,3	2,6	2,5
Railway passenger transport	0,3	0,3	0,3	0,3	0,3
Road passenger transport	25,9	26,3	26,4	26,9	25,7
Water passenger transport	0,0	0,0	0,0	0,0	0,0
Air passenger transport	6,4	8,8	10,0	11,4	11,1
Transport equipment rental	1,8	1,8	1,7	1,6	1,6
Travel agencies and other reservation services industry	2,6	3,0	3,0	3,0	2,9
Cultural industry	0,1	0,1	0,1	0,1	0,1
Sports and recreational industry	1,7	2,1	2,8	2,5	2,7
Retail trade of tourism-connected goods	4,6	4,6	4,8	4,8	5,3
Other non-tourism industries	32,2	27,4	26,6	26,4	27,6
Total	100,0	100,0	100,0	100,0	100,0

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

Figure 6: Tourism direct gross value added (%), 2008 to 2012



Source: Statistics South Africa

3.4 Employment in the tourism industries

Tourism employment is a measure of the number of jobs in tourism and non-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 2010 to 2012. There were 567 313 persons (or 4,3% of total employment) in 2010 directly engaged in producing goods and services purchased by visitors in 2010, 591 785 persons (or 4,5% of total employment) in 2011 and 617 287 (or 4,6% of total employment) in 2012. Tourism industry ratios have been used to allocate employment numbers (by industry) to tourism²⁰.

Cautionary note on employment in the tourism industries

Revision of the old Labour Force Survey

The first Labour Force Survey (LFS) was conducted in 2000 and since then it was undertaken on a six-monthly basis in March and September each year. Starting in 2005, Stats SA undertook a major revision of the LFS. This revision resulted in changes to the survey methodology, the survey questionnaire, the frequency of data collection and data releases and processing systems. The redesigned labour force survey is the Quarterly Labour Force Survey (QLFS) which is now the principal vehicle for collecting labour market information on a quarterly basis. The QLFS was first released in 2008.

To allow for historical comparability of the old series (LFS) with the new QLFS, the old series was revised. Revising historical LFS means that the revised data for, say, September 2002 represent Stats SA's best estimate of what QLFS would have shown had it been conducted in the third quarter of 2002.

The revision was based on link factors computed on the basis of two overlap surveys which were conducted between the old LFS and the new QLFS. The first overlap was between LFS March 2008 and QLFS January–March 2008 and the second overlap was between LFS September 2008 and QLFS July–September 2008.

It should be noted that for the revised estimates, the cut-off age for inclusion in the working age population is now set at 15–64 years to improve international comparability.

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, 2010 (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	99 038	236 090	28 949	368 805	166	9 927	6 607	11 804	34 742	28 429	796 975	1 621 578
Coloured	15 459	33 371	6 686	35 602	382	1 780	1 532	2 330	8 466	8 345	155 787	269 740
Indian/Asian	2 962	6 997	454	15 596	1 839	656	1 953	2 322	2 698	2 277	87 988	125 743
White	26 129	32 041	8 925	44 173	1 022	9 052	1 319	6 192	25 426	10 725	144 458	309 463
Total	143 588	308 500	45 014	464 177	3 408	21 461	11 411	22 648	71 333	49 776	1 185 208	2 326 524
Tourism industry ratio	0,78	0,35	0,07	0,37	0,59	0,94	0,67	0,98	0,21	0,31	0,08	
Tourism employment												
Black African	77 695	82 552	2 035	134 824	98	9 381	4 428	11 565	7 330	8 830	61 452	400 190
Coloured	12 127	11 669	470	13 015	227	1 675	1 026	2 282	1 786	2 592	12 012	58 882
Indian/Asian	2 324	2 447	32	5 701	1 091	617	1 309	2 275	569	707	6 784	23 857
White	20 499	11 204	627	16 148	606	8 515	884	6 067	5 365	3 331	11 139	84 384
Total	112 645	107 871	3 164	169 689	2 022	20 187	7 648	22 189	15 050	15 460	91 388	567 313

** Individual figures may not add up to stated totals due to rounding.
 Source: Statistics South Africa, *Quarterly Labour Force Survey, 2010*

Table 17b: Employment in the tourism industries by population group, 2011 (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	102 765	246 056	47 600	350 782	747	12 986	7 948	9 254	38 751	30 174	824 017	1 671 081
Coloured	15 940	29 581	12 538	38 942	740	2 580	2 111	3 438	6 307	7 987	161 216	281 379
Indian/Asian	7 858	12 254	2 327	18 591	121	1 706	478	1 118	6 141	1 045	88 244	139 881
White	25 746	34 196	12 792	41 664	1 072	9 850	7 880	4 519	30 554	11 855	175 561	355 689
Total	152 309	322 087	75 258	449 979	2 679	27 121	18 417	18 329	81 753	51 060	1 249 038	2 448 030
Tourism industry ratio	0,79	0,37	0,07	0,37	0,53	0,94	0,65	0,98	0,22	0,30	0,08	
Tourism employment												
Black African	81 008	89 938	3 328	128 383	397	12 237	5 190	9 068	8 437	9 023	62 018	409 028
Coloured	12 565	10 812	877	14 253	394	2 431	1 378	3 368	1 373	2 388	12 134	61 973
Indian/Asian	6 194	4 479	163	6 804	64	1 607	312	1 095	1 337	312	6 641	29 010
White	20 295	12 499	894	15 249	570	9 282	5 145	4 428	6 652	3 545	13 213	91 774
Total	120 063	117 728	5 262	164 689	1 426	25 558	12 025	17 960	17 799	15 269	94 006	591 785

** Individual figures may not add up to stated totals due to rounding.
 Source: Statistics South Africa, *Quarterly Labour Force Survey, 2011*

Table 17c: Employment in the tourism industries by population group, 2012 (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	99 164	234 142	61 396	382 652	996	16 028	13 375	9 369	32 393	41 788	868 361	1 759 664
Coloured	16 683	34 041	8 794	28 233	551	5 358	2 327	3 108	11 102	6 824	161 627	278 649
Indian/Asian	1 715	12 411	2 297	19 626	240	2 369	1 835	1 644	3 713	2 781	79 718	128 348
White	23 906	42 166	11 423	27 558	3 562	13 551	7 058	2 828	33 413	13 462	155 246	334 172
Total	141 467	322 759	83 911	458 070	5 348	37 306	24 594	16 949	80 621	64 855	1 264 951	2 500 834
Tourism industry ratio	0,79	0,36	0,07	0,37	0,53	0,94	0,65	0,98	0,21	0,31	0,08	
Tourism employment												
Black African	78 571	85 269	4 271	140 685	531	15 075	8 744	9 180	6 958	13 005	72 269	434 559
Coloured	13 218	12 397	612	10 380	294	5 040	1 521	3 046	2 385	2 124	13 451	64 468
Indian/Asian	1 359	4 520	160	7 216	128	2 228	1 200	1 611	797	866	6 634	26 718
White	18 941	15 356	795	10 132	1 901	12 746	4 614	2 771	7 177	4 190	12 920	91 542
Total	112 089	117 542	5 837	168 413	2 854	35 089	16 079	16 608	17 316	20 184	105 276	617 287

** Individual figures may not add up to stated totals due to rounding.
 Source: Statistics South Africa, *Quarterly Labour Force Survey, 2012*

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 2010 to 2012 focused on the compilation of Tables 1–7 and Table 10. A number of future developments are being considered. These are articulated below.

- Separate the same-day visitors from the tourists (overnight visitors) for inbound and domestic tourism;
- Investigate the possibility of compiling Table 3 of the TSA (outbound tourism). The main constraint currently with the compilation of Table 3 for South Africa is the availability of data;
- Further research the treatment of the service charges paid to travel agents, tour operators and other reservation services;
- Research the treatment of housing services provided by second homes on own account or for free. This imputed rent should be included in the TSA for the calculation of GDVATI, TDGVA and TDGDP. The current constraint is the availability of data and the appropriate instrument to collect the data;
- Measure the full-time employees (FTE) who are directly engaged in producing goods and services purchased by tourists in the South African economy; and
- Investigate the possibility of collecting data on tourism single-purpose consumer durables as a longer-term goal by SAT.

The next TSA report for South Africa will be the results for 2011 to 2013, and is scheduled to be published by the end of March 2015. 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: RiaanG@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 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 of own use
87149.2	Maintenance and repair services of leisure aircraft of 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 of own use insurance services
71334.2	Passengers' vessel of 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, 2010 ('000 000)

	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 (*)	-	-	-	29 727	227 714	257 441	-	-	-
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, 2011 ('000 000)

	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 (*)	-	-	-	26 404	274 522	300 926	-	-	-
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, 2012 ('000 000)

	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 (*)	-	-	-	25 437	324 750	350 187	-	-	-
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 modes of transport

	Number of arrivals	Number of overnights
1. Air		
1.1 Scheduled flights		
1.2 Unscheduled flights		
1.3 Private aircraft		
1.4 Other 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 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, 2010

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 808	7 349	-	-
Capacity (stay units)	65 200	53 800	-	-
Stay unit nights sold	11 514 000	7 357 400	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	48,4%	46,4%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D2: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2011

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 670	7 161	-	-
Capacity (stay units)	65 000	51 200	-	-
Stay unit nights sold	11 490 300	6 918 900	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	48,5%	43,7%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D3: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2012

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 657	7 103	-	-
Capacity (stay units)	65 300	52 700	-	-
Stay unit nights sold	12 145 400	7 542 900	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	50,8%	45,2%	-	-
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	59-99	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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