

# ECONOMIC ANALYSIS

Tourism Satellite Account for South Africa, final 2016 and provisional 2017 and 2018

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# Tourism Satellite Account for South Africa, final 2016 and provisional 2017 and 2018

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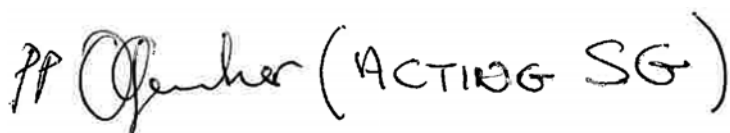
## Abbreviations

BoP	Balance of Payments
CPC	Central Product Classification
GDP	Gross domestic product
GDVATI	Gross direct value added of the tourism industries
GVA	Gross value added
ISIC	International Standard Industrial Classification of all Economic Activities
LSS	Large Sample Survey
QLFS	Quarterly Labour Force Survey
SARB	South African Reserve Bank
SAT	South African Tourism
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
UNWTO	United Nations World Tourism Organization
VA	Value added
VAT	Value added tax

## Preface

The Tourism Satellite Account (TSA), final 2016 and provisional 2017 and 2018 covers updated and new provisional figures for the reference years 2017 and 2018 as well as the final results for 2016. It provides an overview of the role that tourism plays in South Africa and provides information on the contribution by tourism to the South African economy in terms of expenditure and employment.

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

A handwritten signature in black ink, appearing to read 'PP Qenher (ACTING SG)'. The signature is stylized and cursive.

Risenga Maluleke  
Statistician-General  
Pretoria

November 2019

## Key findings

### Key findings of the Tourism Satellite Account for South Africa for 2014 to 2018:

	2014(f)	2015(f)	2016(f)	2017(p)	2018(p)
Inbound tourism expenditure (R million)	106 728	108 760	121 400	120 979	120 037
Annual growth in inbound tourism expenditure (%)	13,3	1,9	11,6	-0,3	-0,8
Outbound tourism expenditure (R million)	68 417	72 712	78 493	80 838	83 673
Annual growth in outbound tourism expenditure (%)	9,3	6,3	7,9	3,0	3,5
Tourism trade balance with the rest of the world (R million)	38 311	36 048	42 907	40 141	36 364
Annual growth in the tourism trade balance with the rest of the world (%)	21,3	-5,9	19,0	-6,4	-9,4
Domestic tourism expenditure (R million)	133 990	122 835	143 816	130 227	153 196
Annual growth in domestic tourism expenditure (%)	7,9	-8,3	17,1	-9,4	17,6
Internal tourism expenditure (R million)	240 718	231 595	265 216	251 206	273 233
Annual growth in internal tourism expenditure (%)	10,3	-3,8	14,5	-5,3	8,8
Tourism direct gross value added (TDGVA) (R million)	104 000	100 137	114 626	108 412	118 446
Tourism direct gross value added (TDGVA) (% of GVA)	3,0	2,8	2,9	2,6	2,7
Tourism direct gross domestic product (TDGDP) (R million)	112 571	109 503	124 911	118 977	130 163
Tourism direct gross domestic product (TDGDP) (% of GDP)	3,0	2,7	2,9	2,6	2,7
Persons directly engaged in producing goods and services purchased by visitors (number)	681 915	669 653	705 871	681 619	739 657
Persons directly engaged in producing goods and services purchased by visitors (% of total)	4,5	4,3	4,5	4,2	4,5

(f) Final

(p) Preliminary

Tourism direct gross value added (TDGVA) increased from R108 412 million in 2017 to R118 446 million in 2018 (9,3% increase). Tourism direct gross domestic product (TDGDP) increased from R118 977 million in 2017 to R130 163 million in 2018 (9,4% increase).

The tourism sector directly employed 739 657 persons in 2018, an increase of 8,5% or 58 038 employees compared with 2017. The tourism share of total employment increased from 2017 (4,2%) to 2018 (4,5%).

The year 2018 saw 15 004 384 non-resident visitors to South Africa compared with 14 975 675 non-resident visitors in 2017 and 15 121 328 non-resident visitors in 2016. Of the 15 004 384 non-resident visitors in 2018, 4 532 279 (or 30,2%) were same-day visitors and 10 472 105 (or 69,8%) were tourists.

For tourism consumption (expenditure), the trends in 2018 (compared with 2017) were:

- Tourism exports (inbound tourism expenditure) decreased by 0,8% to R120 037 million compared with a 0,3% decline in the previous period;
- Tourism imports (outbound tourism expenditure) increased by 3,5% to R83 673 million compared with 3,0% growth in the previous period;
- Domestic tourism expenditure increased by 17,6% to R153 196 million compared with a 9,4% decrease in the previous period; and
- Internal tourism expenditure increased by 8,8% to R273 233 million compared with a 5,3% decrease in the previous period.

Inbound tourism expenditure totalling R120 037 million was recorded in 2018. The main expenditure items were 'non-specific products' (22,5%), 'accommodation for visitors' (15,9%), 'connected products' (14,8%) and 'air passenger transport services' (12,9%). Domestic tourism expenditure totalling R153 196 million (including the domestic portion of outbound tourism expenditure) was recorded in 2018. The main expenditure items were 'road passenger transport services' (28,4%), 'air passenger transport services' (15,9%), 'accommodation for visitors' (15,3%) and 'non-specific products' (12,2%).

The total internal tourism consumption in cash for South Africa in 2018 was R273 233 million (inbound tourism consumption R120 037 million [43,9%] and domestic tourism consumption R153 196 million [56,1%]). The main expenditure items for internal tourism were 'road passenger transport services' (21,3%), 'non-specific products' (16,7%), 'accommodation for visitors' (15,5%) and 'air passenger transport services' (14,6%).

## Chapter 1: Introduction

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

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

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

### 1.1 The importance of a Tourism Satellite Account

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

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

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

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

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

The SNA recommends the development of satellite accounts for the measurement of economic phenomena that are not explicitly shown in the core set of accounts. The TSA was therefore developed for the explicit study of tourism-connected industries and products. A TSA<sup>1</sup> is:

- A statistical instrument used to measure the size of the contribution by the tourism sector 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 activities.<sup>2</sup>

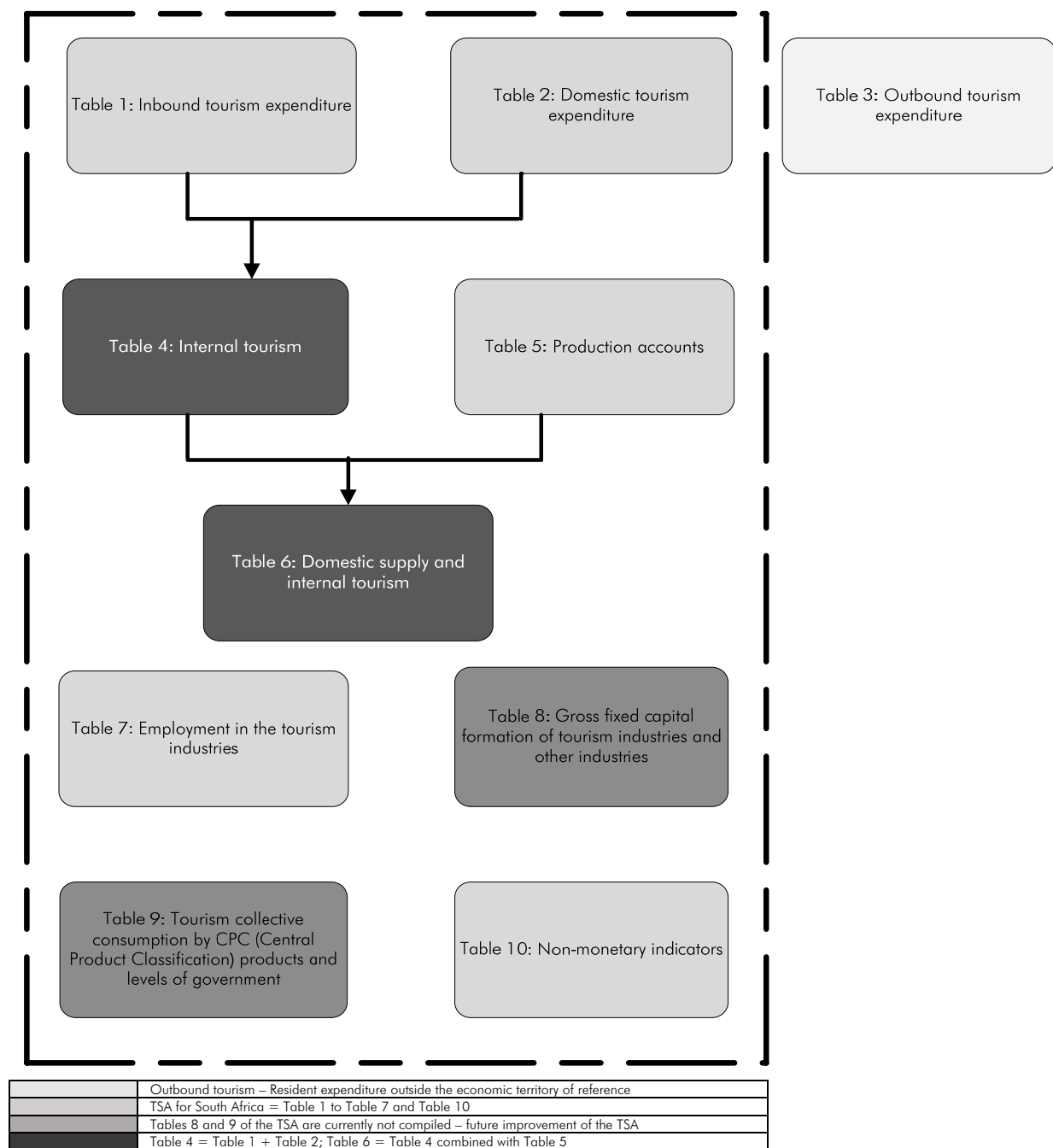
The fundamental structure of a TSA is based on the general relationship existing within an economy between the demand for goods and services generated by tourism on the one hand, and their supply on the other hand, and as such provides a framework for policy analysis of issues related to tourism economics,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

<sup>1</sup> It is important to note that a TSA will only measure the direct impact of tourism on the economy, not the indirect and induced effects.

<sup>2</sup> TSA: RMF, 2008

employment that 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 2016 and provisional 2017 to 2018 provides a coherent framework from within which to integrate and analyse economic statistics related to tourism activity from both the supply and demand side. The South African TSA follows the international guidelines as prescribed by the UNWTO. Figure 1 shows the 10 tables of the TSA.

Figure 1: The 10 tables of a Tourism Satellite Account





A background to the concepts and methodology used in the compilation of the TSA for South Africa can be found in the discussion document 'Draft Tourism Satellite Account for South Africa, 2005 (Discussion document No. D0405.7)' on the Stats SA website ([www.statssa.gov.za](http://www.statssa.gov.za)) as well as from the Reprographics section at Stats SA ([millies@statssa.gov.za](mailto:millies@statssa.gov.za) or 012 310 8619). TSA Tables 1 to 7 for 2016 to 2018, in Microsoft Excel spreadsheets, are released with the November 2019 report on the TSA for South Africa, downloadable from [www.statssa.gov.za](http://www.statssa.gov.za).

## Chapter 2: Data sources

### 2.1 Data sources used for compilation of the Tourism Satellite Account

The Supply and Use Tables (SU-tables) of the SNA are the main source of data for the compilation of Table 5 and Table 6 of the TSA (the confrontation between supply and internal tourism demand). The recommended valuation principles are the same as those of the SNA, namely production should be valued at basic prices, and consumption and use at purchasers' prices.<sup>3</sup>

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 policymaking in South Africa. These statistics are obtained from various sources – from periodic household surveys to annual, quarterly or monthly industry surveys as well as administrative data from external sources such as the South African Reserve Bank (SARB) and SAT.

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

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

Demand-side data				
Survey/administrative data	Conducted in the past?	Latest publication <sup>4</sup>	Frequency	Coverage
Tourism and migration	Yes	October 2019 (reference period – August 2019)	Monthly and annually	Movement control system from DHA
Income and Expenditure Survey (IES)	Yes	2012 (reference period – 2010/2011)	Every 5 years	31 419 dwelling units
Living Conditions Survey (LCS)	Yes	January 2017 (reference period – 2014/2015)	Every 5 years	30 818 dwelling units
Domestic Tourism Survey (DTS)	Yes	September 2019 (reference period – 2018)	Annually	32 000 households
SU-tables	Yes	Reference period 2018 (64x104) Reference period 2010 (171x104)	Annually Periodically	Entire economy

<sup>3</sup> TSA: RMF

<sup>4</sup> October 2018

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 2018 (reference period – 2017)	Annually	General government
Tourist Accommodation Survey	Yes	October 2019 (reference period – August 2019)	Monthly	1 173 enterprises sampled
Survey of food and beverages	Yes	October 2019 (reference period – August 2019)	Monthly	1 118 enterprises sampled
Large Sample Survey (LSS) on accommodation	Yes	October 2017 (reference period – 2015)	Every 5 years	5 892 enterprises sampled
LSS on personal services	Yes	2010 (reference period – 2008)	Every 5 years	4 277 enterprises sampled
LSS on transport and storage	Yes	September 2018 (reference period – 2016)	Every 5 years	7 448 enterprises sampled
LSS on real estate and business services	Yes	September 2018 (reference period – 2016)	Every 5 years	8 004 enterprises sampled
LSS on wholesale and retail trade	Yes	October 2017 (reference period – 2015)	Every 5 years	Wholesale: 3 000 enterprises sampled Retail: 2 800 enterprises sampled
Annual Financial Statistics (AFS) <sup>5</sup>	Yes	November 2018 (reference period – 2017)	Annually	12 897 enterprises sampled
SU-tables	Yes	Reference period 2018 (64x104) Reference period 2010 (171x104)	Annually Periodically	Entire economy

Source: Statistics South Africa

In addition to the data sources compiled by Stats SA, other data sources used include the SARB BoP<sup>6</sup> for South Africa and the SAT domestic and departure surveys. Table 2 provides a brief description of the SAT domestic and departure surveys.

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

<sup>6</sup> Compiled quarterly with a quarterly lag.

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 <sup>7,8</sup>
Departure Survey	Monthly	2018	57 600 people
Domestic Survey	Monthly	2018	15 600 adults

Source: SAT

### 2.1.1 Supply and Use Tables

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

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

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

<sup>7</sup> Annual coverage

<sup>8</sup> Number of individuals covered

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

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

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

## Chapter 3: Tourism Satellite Account for South Africa, final 2016 and provisional 2017 and 2018

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 income.<sup>9</sup> The importance of tourism to both developing and developed nations has created a need to measure its economic and social impact.

### 3.1 Tourism expenditure

Tourism expenditure refers to the acquisition of goods and services by visitors through a monetary transaction for the direct satisfaction of their wants and needs during their stay at their destination.<sup>10</sup> Tables 3a to 3c show tourism expenditure by product for South Africa, for the reference years 2016 to 2018.

#### *Tourism product ratio*

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

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

1. A *tourism-characteristic product* is a product that will cease to exist in meaningful quantity, or for which the level of consumption would be significantly reduced, in the absence of visitors. A product is classified as a tourism-characteristic product if at least 25 per cent of its production is purchased by visitors (that is, a tourism-characteristic product has a tourism product ratio of greater than or equal to 0,25).
2. A *tourism-connected (or related) product* is distinct from a tourism-characteristic product in that visitors consume a smaller proportion of the total supply of the product. For a product to be classified as a tourism-connected product, visitors must purchase more than 0 per cent and less than 25 per cent of its production (that is, a tourism-connected product has a tourism product ratio that is greater than 0 and less than 0,25).
3. A *non-tourism-connected product* is a product that is a non-tourism-specific<sup>11</sup> product.

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

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

<sup>9</sup> TSA: RMF

<sup>10</sup> TSA: RMF

<sup>11</sup> A tourism-specific product is either a tourism-characteristic product or a tourism-related product.

Table 3a: Tourism expenditure by product, 2016

Product	Domestic visitor demand (1)	Inbound visitor demand (exports) (2)	Internal visitor demand (3) = (1)+(2)	Total domestic supply (4)	Tourism product ratio (5) = (3)/(4)	Tourism spending abroad (imports) (6)
	R million				Percentage	R million
<b>Characteristic products</b>	<b>104 589</b>	<b>70 568</b>	<b>175 157</b>	<b>338 548</b>	<b>51,7</b>	
Accommodation services	20 862	17 589	38 451	40 726	94,4	
Restaurants and similar	6 985	10 684	17 668	46 777	37,8	
Passenger transport services	64 354	30 843	95 197	203 645	46,7	
<i>Railway passenger transportation services</i>	407	199	606	8 644	7,0	
<i>Road passenger transportation services</i>	39 365	14 412	53 777	150 236	35,8	
<i>Water passenger transportation services</i>	12	8	20	39	51,2	
<i>Air passenger transportation services</i>	21 145	14 472	35 618	37 109	96,0	
Transport equipment rental	3 424	1 752	5 176	7 617	68,0	
Travel agencies and similar services	8 600	3 615	12 215	12 464	98,0	
Cultural services	184	217	401	1 747	22,9	
Sports and recreational services	3 603	7 621	11 225	33 189	33,8	
<b>Connected products</b>	<b>13 836</b>	<b>16 401</b>	<b>30 238</b>	<b>348 207</b>	<b>8,7</b>	
Retail sales of food, beverages and tobacco	7 132	8 458	15 589	173 384	9,0	
Retail sales of textiles, clothing, footwear and leather goods	3 165	4 880	8 045	79 255	10,2	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	90	228	318	25 269	1,3	
Retail sales of household furniture, appliances, articles and equipment	424	1 463	1 886	42 798	4,4	
Retail sales of automotive fuel	3 025	1 374	4 399	27 500	16,0	
<b>Non-specific products</b>	<b>25 391</b>	<b>34 430</b>	<b>59 822</b>	<b>7 776 923</b>	<b>0,8</b>	
<b>Total</b>	<b>143 816</b>	<b>121 400</b>	<b>265 216</b>	<b>8 463 677</b>	<b>3,1</b>	<b>78 493</b>

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

Table 3b: Tourism expenditure by product, 2017

Product	Domestic visitor demand (1)	Inbound visitor demand (exports) (2)	Internal visitor demand (3) = (1)+(2)	Total domestic supply (4)	Tourism product ratio (5) = (3)/(4)	Tourism spending abroad (imports) (6)
	R million				Percentage	R million
<b>Characteristic products</b>	<b>102 740</b>	<b>73 386</b>	<b>176 126</b>	<b>357 844</b>	<b>49,2</b>	
Accommodation services	21 343	18 522	39 865	43 152	92,4	
Restaurants and similar	6 356	10 968	17 324	50 616	34,2	
Passenger transport services	62 227	31 858	94 085	213 462	44,1	
Railway passenger transportation services	448	215	663	9 463	7,0	
Road passenger transportation services	35 301	14 579	49 880	155 857	32,0	
Water passenger transportation services	14	9	23	45	51,3	
Air passenger transportation services	22 878	15 181	38 058	39 949	95,3	
Transport equipment rental	3 587	1 874	5 461	8 147	67,0	
Travel agencies and similar services	9 428	3 962	13 390	13 664	98,0	
Cultural services	160	225	385	1 848	20,8	
Sports and recreational services	3 226	7 851	11 077	35 103	31,6	
<b>Connected products</b>	<b>12 434</b>	<b>16 752</b>	<b>29 187</b>	<b>374 502</b>	<b>7,8</b>	
Retail sales of food, beverages and tobacco	5 955	8 579	14 534	187 163	7,8	
Retail sales of textiles, clothing, footwear and leather goods	2 782	4 930	7 712	85 066	9,1	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	83	231	315	27 257	1,2	
Retail sales of household furniture, appliances, articles and equipment	384	1 543	1 927	45 651	4,2	
Retail sales of automotive fuel	3 230	1 468	4 698	29 365	16,0	
<b>Non-specific products</b>	<b>15 052</b>	<b>30 840</b>	<b>45 892</b>	<b>8 232 200</b>	<b>0,6</b>	
<b>Total</b>	<b>130 227</b>	<b>120 979</b>	<b>251 206</b>	<b>8 964 547</b>	<b>2,8</b>	<b>80 838</b>

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



Table 3c: Tourism expenditure by product, 2018

Product	Domestic visitor demand (1)	Inbound visitor demand (exports) (2)	Internal visitor demand (3) = (1)+(2)	Total domestic supply (4)	Tourism product ratio (5) = (3)/(4)	Tourism spending abroad (imports) (6)
	R million				Percentage	R million
<b>Characteristic products</b>	<b>118 398</b>	<b>75 258</b>	<b>193 656</b>	<b>372 733</b>	<b>52,0</b>	
Accommodation services	23 377	19 073	42 450	45 119	94,1	
Restaurants and similar	8 111	11 598	19 709	52 852	37,3	
Passenger transport services	72 142	32 312	104 453	221 666	47,1	
<i>Railway passenger transportation services</i>	468	223	691	9 829	7,0	
<i>Road passenger transportation services</i>	43 435	14 749	58 183	161 879	35,9	
<i>Water passenger transportation services</i>	14	10	24	47	51,6	
<i>Air passenger transportation services</i>	24 387	15 435	39 822	41 493	96,0	
Transport equipment rental	3 838	1 894	5 733	8 419	68,1	
Travel agencies and similar services	9 792	4 116	13 908	14 192	98,0	
Cultural services	209	240	449	1 945	23,1	
Sports and recreational services	4 767	7 920	12 687	36 960	34,3	
<b>Connected products</b>	<b>16 136</b>	<b>17 807</b>	<b>33 944</b>	<b>391 035</b>	<b>8,7</b>	
Retail sales of food, beverages and tobacco	8 916	9 388	18 305	195 426	9,4	
Retail sales of textiles, clothing, footwear and leather goods	3 220	4 970	8 190	88 821	9,2	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	100	258	358	28 460	1,3	
Retail sales of household furniture, appliances, articles and equipment	528	1 657	2 185	47 667	4,6	
Retail sales of automotive fuel	3 373	1 533	4 906	30 661	16,0	
<b>Non-specific products</b>	<b>18 661</b>	<b>26 972</b>	<b>45 633</b>	<b>8 532 173</b>	<b>0,5</b>	
<b>Total</b>	<b>153 196</b>	<b>120 037</b>	<b>273 233</b>	<b>9 295 941</b>	<b>2,9</b>	<b>83 673</b>

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

*Tourism Satellite Account: Recommended Methodological Framework – Retail*

Although the acquisition of goods is part of tourism consumption for their whole value at purchasers' prices, and some goods might even be considered as tourism characteristic, it is only the retail trade activity associated with the goods acquired by visitors that will be considered as serving the visitors. When establishing tourism shares, which are values required for the calculation of tourism direct gross value added, it is the value of the retail trade margin that will be used as the basis of their calculation, as this margin represents the value of the output of the service provider who makes the good available to the visitor.

For tourism-characteristic goods, the total sum of these trade and transport margins corresponds to retail trade margins on the one hand, and wholesale trade and transport margins on the other. Only the retail trade margins generate share. The retail trade margins are attributable to the industry identified as Retail trade of country-specific tourism characteristic goods, whereas the wholesale and transport margins are attributable to other industries (no share). For the other goods, all the value of trade and transport margins pertains to other industries, and part of it generates share (the part corresponding to retail trade) whereas the rest of the value does not generate share.

In both cases, the corresponding retail trade margins are assigned back to the industries that have produced these margins (retail trade) following the same procedure as that used in setting up the supply and use tables of the System of National Accounts 2008. The tourism shares will be established only on the margins produced by the retail trade industry, either tourism characteristic or not. The remaining value of goods purchased by visitors is deemed not to generate tourism shares and not to generate tourism direct gross value added, but only indirect effects.

Countries using in their compilation of tourism direct gross value added (TDGVA) or tourism direct gross domestic product (TDGDP) the value added of all activities involved in the supply of goods, instead of limiting their share to the retail trade margin, should provide an estimate of the impact of this method on the result. In particular, the value added associated with the retail trade activity should be separately identified. This would facilitate the international comparability of estimates.

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

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

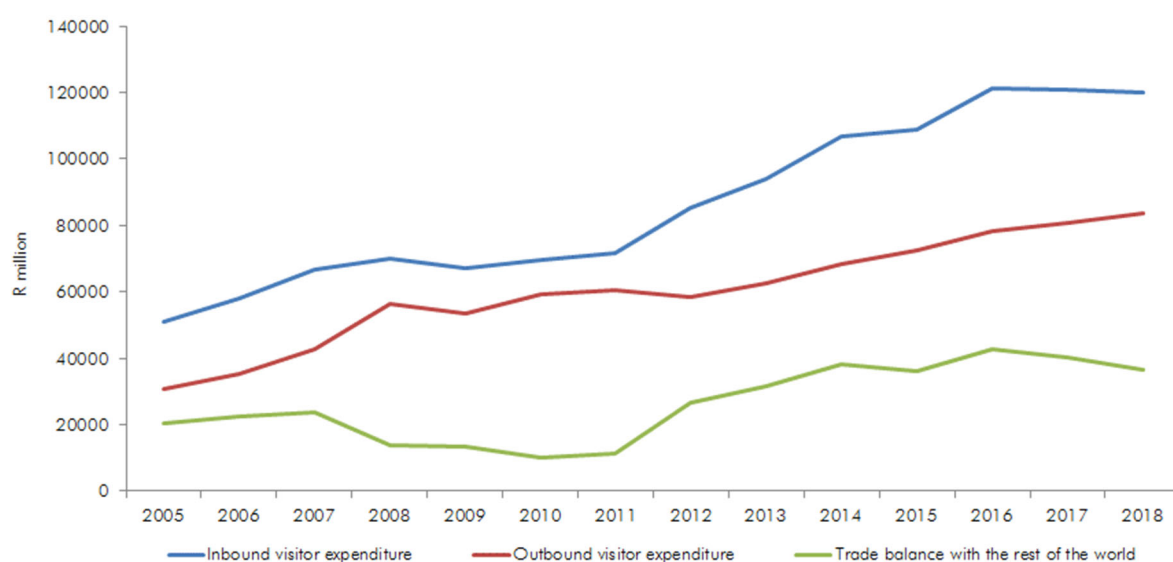
Table 4 and Figure 2 show the Tourism Balance of Payments for South Africa for the reference years 2005 to 2018.

Table 4: The Tourism Balance of Payments for South Africa, 2005–2018

Year	Inbound tourism expenditure	Outbound tourism expenditure	Tourism trade balance with the rest of the world
R million			
2005	51 090	30 631	20 459
2006	57 983	35 413	22 570
2007	66 653	42 875	23 778
2008	69 963	56 317	13 646
2009	67 141	53 553	13 588
2010	69 422	59 452	9 970
2011	71 747	60 545	11 202
2012	85 423	58 588	26 835
2013	94 183	62 596	31 587
2014	106 728	68 417	38 311
2015	108 760	72 712	36 048
2016	121 400	78 493	42 907
2017	120 979	80 838	40 141
2018	120 037	83 673	36 364

Source: South African Reserve Bank

Figure 2: The Tourism Balance of Payments for South Africa, 2005–2018 (R million)



### 3.1.1 Inbound tourism expenditure

Table 5 and Table 6 show inbound tourism expenditure by type of product (R million and percentage contribution) for the reference years 2014 to 2018; Figure 3 shows corresponding growth rates.

Inbound tourism expenditure totalling R106 728 million was recorded in 2014. The main expenditure items were 'non-specific products' (28,5%), 'tourism-connected products' (14,3%), 'accommodation for visitors' (13,8%) and 'road passenger transport services' (12,3%). Inbound tourism expenditure totalling R120 037 million was recorded in 2018. The main expenditure items were 'non-specific products' (22,5%), 'accommodation for visitors' (15,9%), 'connected products' (14,8%) and 'air passenger transport services' (12,9%).

The year 2018 saw 15 004 384 non-resident visitors to South Africa compared with 14 975 675 non-resident visitors in 2017 and 15 121 328 non-resident visitors in 2016. Of the 15 004 384 non-resident visitors in 2018, 4 532 279 (or 30,2%) were same-day visitors and 10 472 105 (or 69,8%) were tourists.

Table 5: Inbound tourism expenditure by type of product, 2014–2018 (R million)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	14 720	16 476	17 589	18 522	19 073
Restaurants and similar services	9 616	9 989	10 684	10 968	11 598
Railway passenger transport services	162	187	199	215	223
Road passenger transport services	13 148	14 142	14 412	14 579	14 749
Water passenger transport services	4	7	8	9	10
Air passenger transport services	11 960	13 275	14 472	15 181	15 435
Transport equipment rental	1 492	1 597	1 752	1 874	1 894
Travel agencies and other reservation services	2 877	3 281	3 615	3 962	4 116
Cultural services	197	201	217	225	240
Sports and recreational services	6 834	7 253	7 621	7 851	7 920
Tourism-connected products	15 251	16 437	16 401	16 752	17 807
Non-specific products	30 467	25 915	34 430	30 840	26 972
<b>Total</b>	<b>106 728</b>	<b>108 760</b>	<b>121 400</b>	<b>120 979</b>	<b>120 037</b>

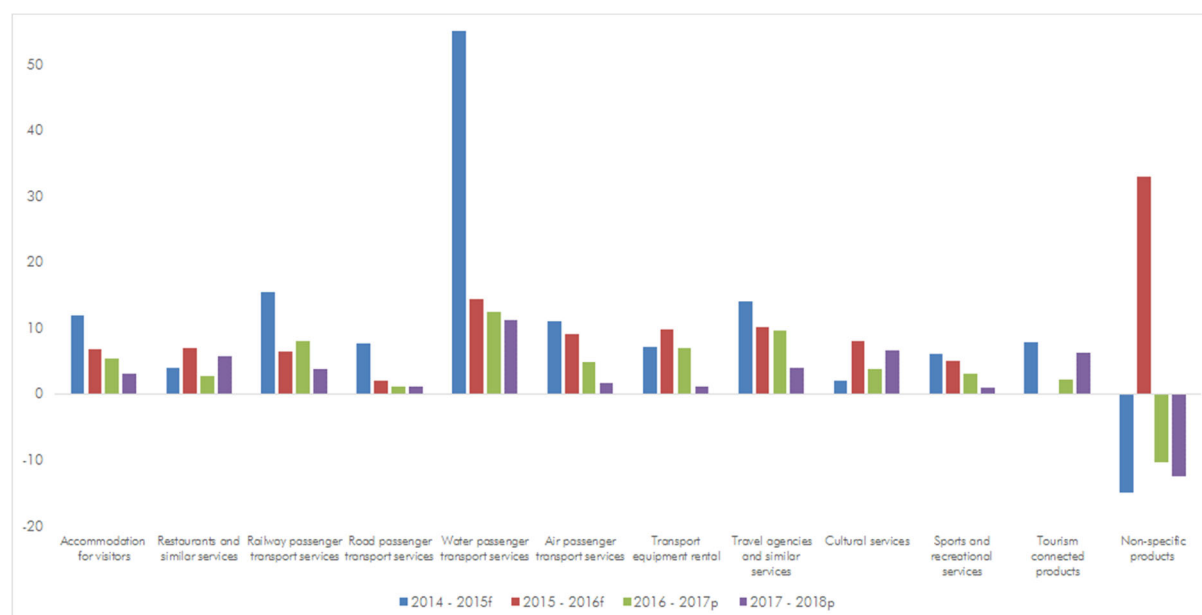
Individual figures may not add up to stated totals due to rounding.

Table 6: Inbound tourism expenditure by type of product, 2014–2018 (%)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	13,8	15,1	14,5	15,3	15,9
Restaurants and similar services	9,0	9,2	8,8	9,1	9,7
Railway passenger transport services	0,2	0,2	0,2	0,2	0,2
Road passenger transport services	12,3	13,0	11,9	12,1	12,3
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	11,2	12,2	11,9	12,5	12,9
Transport equipment rental	1,4	1,5	1,4	1,5	1,6
Travel agencies and other reservation services	2,7	3,0	3,0	3,3	3,4
Cultural services	0,2	0,2	0,2	0,2	0,2
Sports and recreational services	6,4	6,7	6,3	6,5	6,6
Tourism-connected products	14,3	15,1	13,5	13,8	14,8
Non-specific products	28,5	23,8	28,4	25,5	22,5
<b>Total</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>

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

Figure 3: Inbound tourism expenditure: Annual growth by type of product, 2014–2018 (%)



Source: Statistics South Africa

### 3.1.2 Domestic tourism expenditure

Table 7 and Table 8 show domestic tourism expenditure by type of product (R million and percentage contribution) for the reference years 2014 to 2018; Figure 4 shows corresponding growth rates.

Domestic tourism expenditure totalling R133 990 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2014. The main expenditure items were 'road passenger transport services' (29,3%), 'non-specific products' (17,9%), 'accommodation for visitors' (14,6%) and 'air passenger transport services' (13,8%).

Domestic tourism expenditure totalling R153 196 million (including the domestic portion of outbound tourism expenditure) was recorded in 2018. The main expenditure items were 'road passenger transport services' (28,4%), 'air passenger transport services' (15,9%), 'accommodation for visitors' (15,3%) and 'non-specific products' (12,2%).

Table 7: Domestic tourism expenditure by type of product, 2014–2018 (R million)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	19 530	20 083	20 862	21 343	23 377
Restaurants and similar services	5 641	6 348	6 985	6 356	8 111
Railway passenger transport services	376	383	407	448	468
Road passenger transport services	39 286	33 914	39 365	35 301	43 435
Water passenger transport services	9	11	12	14	14
Air passenger transport services	18 489	20 040	21 145	22 878	24 387
Transport equipment rental	2 921	3 310	3 424	3 587	3 838
Travel agencies and other reservation services	6 844	7 807	8 600	9 428	9 792
Cultural services	165	141	184	160	209
Sports and recreational services	3 480	2 982	3 603	3 226	4 767
Tourism-connected products	13 206	10 063	13 836	12 434	16 136
Non-specific products	24 044	17 753	25 391	15 052	18 661
<b>Total</b>	<b>133 990</b>	<b>122 835</b>	<b>143 816</b>	<b>130 227</b>	<b>153 196</b>

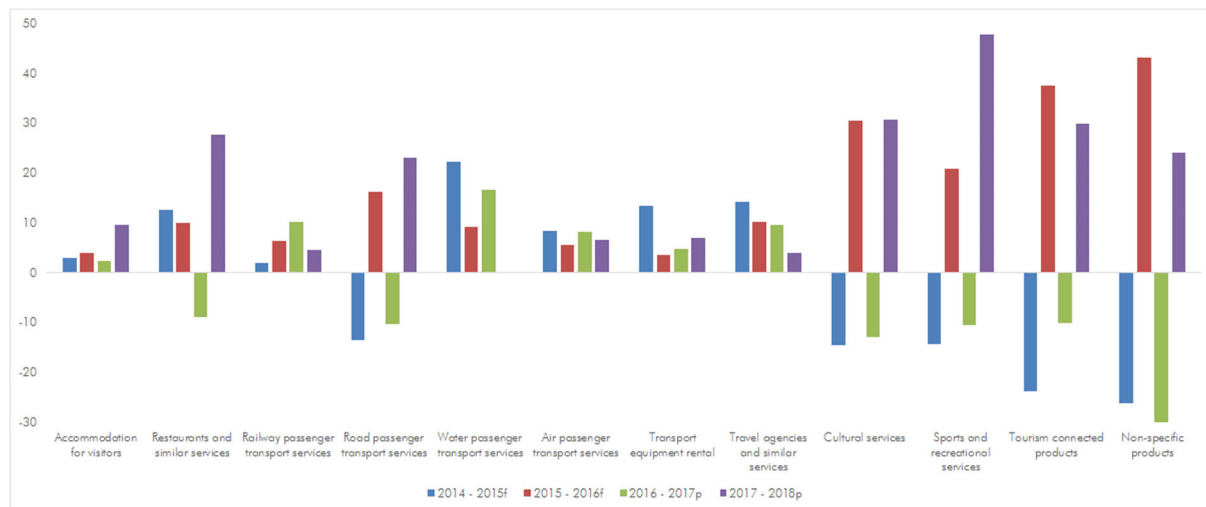
Individual figures may not add up to stated totals due to rounding.

Table 8: Domestic tourism expenditure by type of product, 2014–2018 (%)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	14,6	16,3	14,5	16,4	15,3
Restaurants and similar services	4,2	5,2	4,9	4,9	5,3
Railway passenger transport services	0,3	0,3	0,3	0,3	0,3
Road passenger transport services	29,3	27,6	27,4	27,1	28,4
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	13,8	16,3	14,7	17,6	15,9
Transport equipment rental	2,2	2,7	2,4	2,8	2,5
Travel agencies and other reservation services	5,1	6,4	6,0	7,2	6,4
Cultural services	0,1	0,1	0,1	0,1	0,1
Sports and recreational services	2,6	2,4	2,5	2,5	3,1
Tourism-connected products	9,9	8,2	9,6	9,5	10,5
Non-specific products	17,9	14,5	17,7	11,6	12,2
<b>Total</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>

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

Figure 4: Domestic tourism expenditure: Annual growth by type of product, 2014–2018 (%)



Source: Statistics South Africa

### 3.1.3. Internal tourism expenditure

Table 9 and Table 10 show internal tourism expenditure by type of product (goods and services) (R million and percentage contribution) for the reference years 2014 to 2018; Figure 5 shows corresponding growth rates.

The total internal tourism consumption in cash for South Africa in 2014 was R240 718 million (inbound tourism consumption R106 728 million [44,3%] and domestic tourism consumption R133 990 million [55,7%]). The main expenditure items for internal tourism were 'non-specific products' (22,6%), 'road passenger transport services' (21,8%), 'accommodation for visitors' (14,2%) and 'air passenger transport services' (12,6%).

The total internal tourism consumption in cash for South Africa in 2018 was R273 233 million (inbound tourism consumption R120 037 million [43,9%] and domestic tourism consumption R153 196 million [56,1%]). The main expenditure items for internal tourism were 'road passenger transport services' (21,3%), 'non-specific products' (16,7%), 'accommodation for visitors' (15,5%) and 'air passenger transport services' (14,6%).



Table 9: Internal tourism expenditure by type of product, 2014–2018 (R million)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	34 250	36 559	38 451	39 865	42 450
Restaurants and similar services	15 257	16 337	17 668	17 324	19 709
Railway passenger transport services	537	570	606	663	691
Road passenger transport services	52 434	48 056	53 777	49 880	58 183
Water passenger transport services	13	18	20	23	24
Air passenger transport services	30 449	33 315	35 618	38 058	39 822
Transport equipment rental	4 413	4 907	5 176	5 461	5 733
Travel agencies and other reservation services	9 721	11 088	12 215	13 390	13 908
Cultural services	362	342	401	385	449
Sports and recreational services	10 314	10 236	11 225	11 077	12 687
Tourism-connected products	28 458	26 500	30 238	29 187	33 944
Non-specific products	54 510	43 668	59 822	45 892	45 633
<b>Total</b>	<b>240 718</b>	<b>231 595</b>	<b>265 216</b>	<b>251 206</b>	<b>273 233</b>

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

Table 10: Internal tourism expenditure by type of product, 2014–2018 (%)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	14,2	15,8	14,5	15,9	15,5
Restaurants and similar services	6,3	7,1	6,7	6,9	7,2
Railway passenger transport services	0,2	0,2	0,2	0,3	0,3
Road passenger transport services	21,8	20,7	20,3	19,9	21,3
Water passenger transport services	0,0	0,0	0,0	0,0	0,0
Air passenger transport services	12,6	14,4	13,4	15,2	14,6
Transport equipment rental	1,8	2,1	2,0	2,2	2,1
Travel agencies and other reservation services	4,0	4,8	4,6	5,3	5,1
Cultural services	0,2	0,1	0,2	0,2	0,2
Sports and recreational services	4,3	4,4	4,2	4,4	4,6
Tourism-connected products	11,8	11,4	11,4	11,6	12,4
Non-specific products	22,6	18,9	22,6	18,3	16,7
<b>Total</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>

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

Figure 5: Internal tourism expenditure: Annual growth by type of product, 2014–2018 (%)



Source: Statistics South Africa

### 3.2 Production accounts

Table 5 of the TSA (see Figure 1) focuses on the production accounts of tourism industries and other industries (at basic prices). It conforms formally to the format established by the SNA, but the perspective is different from that of the SNA production accounts (a tool for tourism analysis). Because of the application of the principle of recording reservation services separately, output and intermediate consumption of each industry and the corresponding total for the economy that appears in the last column do not necessarily correspond to the corresponding values found in the national accounts of the country.<sup>12</sup> 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 accounts.<sup>13</sup>

Tables 11a to 11c show the production accounts for the tourism industries and other industries for the reference years 2016 to 2018. 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 R221 696 million (or 5,7% of total GVA generated) in 2016, R237 713 million (or 5,7% of total GVA generated) in 2017 and R247 717 million (or 5,7% of total GVA generated) in 2018.

<sup>12</sup> TSA: RMF

<sup>13</sup> 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), 2016  
(R million)

Product	Tourism- characteristic industries	Tourism- connected industries	Other non- tourism industries	Total output of domestic producers (at basic prices)
<b>A. Specific products</b>	<b>310 214</b>	<b>137 946</b>	<b>238 594</b>	<b>686 754</b>
<b>A.1 Characteristic products</b>	<b>310 214</b>		<b>28 333</b>	<b>338 548</b>
1. Accommodation services	34 942		5 784	40 726
1.1 Hotel and other accommodation for visitors other than 1.2	34 942		5 784	40 726
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	33 168		13 608	46 777
3. Passenger transport services	194 704		8 941	203 645
3.1 Railway passenger transport services	8 644			8 644
3.2 Road passenger transport services	141 296		8 941	150 236
3.3 Water passenger transport services	39			39
3.4 Air passenger transport services	37 109			37 109
3.5 Passenger transport equipment rental	7 617			7 617
4. Travel agencies and other reservation services	12 464			12 464
5. Cultural industry	1 747			1 747
6. Sports and recreational industry	33 189			33 189
<b>A.2 Connected products</b>		<b>137 946</b>	<b>210 261</b>	<b>348 207</b>
Retail sales of food, beverages and tobacco		53 752	119 633	173 384
Retail sales of textiles, clothing, footwear and leather products		19 814	59 441	79 255
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		16 551	8 718	25 269
Retail sales of household furniture, appliances, articles and equipment		29 414	13 384	42 798
Retail sales of automotive fuel		18 416	9 084	27 500
<b>B. Non-specific products</b>	<b>33 522</b>	<b>1 603</b>	<b>7 742 798</b>	<b>7 776 923</b>
<b>Total output (at basic prices)</b>	<b>342 736</b>	<b>139 549</b>	<b>7 981 391</b>	<b>8 463 677</b>
<b>Total intermediate consumption (at purchasers' prices)</b>	<b>195 800</b>	<b>64 790</b>	<b>4 311 532</b>	<b>4 572 122</b>
<b>Total gross value added (at basic prices)</b>	<b>146 936</b>	<b>74 760</b>	<b>3 669 860</b>	<b>3 891 555</b>
Compensation of employees	57 021	42 338	1 973 502	2 072 861
Taxes less subsidies on production	2 429	1 527	73 207	77 163
Gross operating surplus	87 486	30 894	1 623 152	1 741 531

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), 2017  
(R million)

Product	Tourism-characteristic industries	Tourism-connected industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
<b>A. Specific products</b>	<b>327 486</b>	<b>148 538</b>	<b>256 322</b>	<b>732 346</b>
<b>A.1 Characteristic products</b>	<b>327 486</b>		<b>30 357</b>	<b>357 844</b>
1. Accommodation services	36 968		6 184	43 152
1.1 Hotel and other accommodation for visitors other than 1.2				
1.2 Accommodation services associated with all types of vacation home ownership	36 968		6 184	43 152
2. Restaurants and similar services	35 897		14 718	50 616
3. Passenger transport services	204 007		9 455	213 462
3.1 Railway passenger transport services	9 463			9 463
3.2 Road passenger transport services	146 403		9 455	155 857
3.3 Water passenger transport services	45			45
3.4 Air passenger transport services	39 949			39 949
3.5 Passenger transport equipment rental	8 147			8 147
4. Travel agencies and other reservation services	13 664			13 664
5. Cultural industry	1 848			1 848
6. Sports and recreational industry	35 103			35 103
<b>A.2 Connected products</b>		<b>148 538</b>	<b>225 964</b>	<b>374 502</b>
Retail sales of food, beverages and tobacco		58 160	129 003	187 163
Retail sales of textiles, clothing, footwear and leather products		21 266	63 799	85 066
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		17 900	9 357	27 257
Retail sales of household furniture, appliances, articles and equipment		31 308	14 343	45 651
Retail sales of automotive fuel		19 903	9 461	29 365
<b>B. Non-specific products</b>	<b>34 339</b>	<b>1 580</b>	<b>8 196 281</b>	<b>8 232 200</b>
<b>Total output (at basic prices)</b>	<b>361 825</b>	<b>150 118</b>	<b>8 452 603</b>	<b>8 964 547</b>
<b>Total intermediate consumption (at purchasers' prices)</b>	<b>205 958</b>	<b>68 272</b>	<b>4 516 991</b>	<b>4 791 222</b>
<b>Total gross value added (at basic prices)</b>	<b>155 867</b>	<b>81 846</b>	<b>3 935 612</b>	<b>4 173 325</b>
Compensation of employees	61 496	45 381	2 118 918	2 225 796
Taxes less subsidies on production	2 527	1 644	78 250	82 421
Gross operating surplus	91 843	34 820	1 738 445	1 865 108

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), 2018  
(R million)

Product	Tourism- characteristic industries	Tourism- connected industries	Other non- tourism industries	Total output of domestic producers (at basic prices)
<b>A. Specific products</b>	<b>341 034</b>	<b>155 095</b>	<b>267 639</b>	<b>763 768</b>
<b>A.1 Characteristic products</b>	<b>341 034</b>		<b>31 699</b>	<b>372 733</b>
1. Accommodation services	38 608		6 511	45 119
1.1 Hotel and other accommodation for visitors other than 1.2	38 608		6 511	45 119
1.2 Accommodation services associated with all types of vacation home ownership				
2. Restaurants and similar services	37 484		15 368	52 852
3. Passenger transport services	211 846		9 820	221 666
3.1 Railway passenger transport services	9 829			9 829
3.2 Road passenger transport services	152 059		9 820	161 879
3.3 Water passenger transport services	47			47
3.4 Air passenger transport services	41 493			41 493
3.5 Passenger transport equipment rental	8 419			8 419
4. Travel agencies and other reservation services	14 192			14 192
5. Cultural industry	1 945			1 945
6. Sports and recreational industry	36 960			36 960
<b>A.2 Connected products</b>		<b>155 095</b>	<b>235 940</b>	<b>391 035</b>
Retail sales of food, beverages and tobacco		60 728	134 698	195 426
Retail sales of textiles, clothing, footwear and leather products		22 205	66 616	88 821
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		18 690	9 770	28 460
Retail sales of household furniture, appliances, articles and equipment		32 690	14 976	47 667
Retail sales of automotive fuel		20 782	9 879	30 661
<b>B. Non-specific products</b>	<b>35 937</b>	<b>1 650</b>	<b>8 494 586</b>	<b>8 532 173</b>
<b>Total output (at basic prices)</b>	<b>376 971</b>	<b>156 745</b>	<b>8 762 225</b>	<b>9 295 941</b>
<b>Total intermediate consumption (at purchasers' prices)</b>	<b>214 713</b>	<b>71 286</b>	<b>4 668 650</b>	<b>4 954 649</b>
<b>Total gross value added (at basic prices)</b>	<b>162 258</b>	<b>85 459</b>	<b>4 093 575</b>	<b>4 341 292</b>
Compensation of employees	64 058	47 385	2 213 451	2 324 894
Taxes less subsidies on production	2 646	1 717	81 277	85 640
Gross operating surplus	95 554	36 357	1 798 847	1 930 759

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

### 3.3 Domestic supply and internal tourism consumption by product

Table 6 (see Figure 1) is the core of the TSA and focuses on total domestic supply and internal tourism consumption (at purchasers' prices). The confrontation and reconciliation between supply and demand (inclusive of internal tourism consumption) takes place within this table. It is derived from the SU-tables in the SNA.<sup>14</sup> Tables 12a to 12c show the domestic supply and internal tourism consumption by product (Table 6 of the TSA) for the reference years 2016 to 2018. The tourism direct gross value added (TDGVA) for South Africa amounted to R114 626 million (or 2,9% of total GVA generated) in 2016, R108 412 million (or 2,6% of total GVA generated) in 2017 and R118 446 million (or 2,7% of total GVA generated) in 2018.

Tables 13a to 13c show the compilation of tourism industry ratios for the reference years 2016 to 2018.

#### *Tourism industry ratio*

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

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

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

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

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

<sup>14</sup> TSA: RMF

Table 12a: Internal tourism consumption by product, 2016 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total internal tourism consumption	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			
<b>A. Specific products</b>	35 619	8 998	86 820	5 176	12 215	12 526	161 356	11 295	32 744	205 395	
<b>A.1 Characteristic products</b>	35 619	8 998	86 820	5 176	12 215	12 526	161 356		13 801	175 157	
1. Accommodation services	32 147					844	32 990		5 461	38 451	
1.1 Hotel and other accommodation for visitors other than 1.2	32 147					844	32 990		5 461	38 451	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 473	8 998				58	12 528		5 140	17 668	
3. Passenger transport services			86 820	5 176			91 997		3 200	95 197	
3.1 Railway passenger transport services			606				606			606	
3.2 Road passenger transport services			50 576				50 576		3 200	53 777	
3.3 Water passenger transport services			20				20			20	
3.4 Air passenger transport services			35 618				35 618			35 618	
3.5 Passenger transport equipment rental				5 176			5 176			5 176	
4. Travel agencies and other reservation services					12 215		12 215			12 215	
5. Cultural industry						401	401			401	
6. Sports and recreational industry						11 225	11 225			11 225	
<b>A.2 Connected products</b>								11 295	18 943	30 238	
Retail sales of food, beverages and tobacco								4 833	10 756	15 589	
Retail sales of textiles, clothing, footwear and leather products								2 011	6 034	8 045	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								208	110	318	
Retail sales of household furniture, appliances, articles and equipment								1 296	590	1 886	
Retail sales of automotive fuel								2 946	1 453	4 399	
<b>B. Non-specific products</b>	12 870	1	13	1	9	25	12 920	5	46 897	59 822	
<b>Total output (at basic prices)</b>	48 489	9 000	86 833	5 177	12 224	12 551	174 275	11 299	79 642	265 216	10 285
<b>Total intermediate consumption (at purchasers' prices)</b>	28 646	5 722	47 891	3 692	7 176	9 196	102 322	5 246	43 022	150 591	
<b>Total gross value added (at basic prices)</b>	19 843	3 278	38 943	1 485	5 048	3 355	71 953	6 053	36 619	114 626	

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

Table 12b: Internal tourism consumption by product, 2017 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total internal tourism consumption	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			
<b>A. Specific products</b>	36 595	8 915	85 598	5 461	13 390	12 391	162 350	11 157	31 806	205 313	
<b>A.1 Characteristic products</b>	36 595	8 915	85 598	5 461	13 390	12 391	162 350		13 777	176 126	
1. Accommodation services	33 279					874	34 152		5 713	39 865	
1.1 Hotel and other accommodation for visitors other than 1.2	33 279					874	34 152		5 713	39 865	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 316	8 915				55	12 286		5 038	17 324	
3. Passenger transport services			85 598	5 461			91 059		3 026	94 085	
3.1 Railway passenger transport services			663				663			663	
3.2 Road passenger transport services			46 854				46 854		3 026	49 880	
3.3 Water passenger transport services			23				23			23	
3.4 Air passenger transport services			38 058				38 058			38 058	
3.5 Passenger transport equipment rental				5 461			5 461			5 461	
4. Travel agencies and other reservation services					13 390		13 390			13 390	
5. Cultural industry						385	385			385	
6. Sports and recreational industry						11 077	11 077			11 077	
<b>A.2 Connected products</b>								11 157	18 030	29 187	
Retail sales of food, beverages and tobacco								4 517	10 018	14 534	
Retail sales of textiles, clothing, footwear and leather products								1 928	5 784	7 712	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								207	108	315	
Retail sales of household furniture, appliances, articles and equipment								1 321	605	1 927	
Retail sales of automotive fuel								3 185	1 514	4 698	
<b>B. Non-specific products</b>	13 505	1	13	1	10	27	13 557	4	32 331	45 892	
<b>Total output (at basic prices)</b>	50 100	8 916	85 612	5 461	13 400	12 418	175 907	11 162	64 137	251 206	10 566
<b>Total intermediate consumption (at purchasers' prices)</b>	29 546	5 628	47 431	3 855	7 887	9 097	103 444	5 076	34 274	142 794	
<b>Total gross value added (at basic prices)</b>	20 554	3 289	38 180	1 607	5 514	3 320	72 464	6 085	29 863	108 412	

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



Table 12c: Internal tourism consumption by product, 2018 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total internal tourism consumption	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			
<b>A. Specific products</b>	<b>39 161</b>	<b>10 142</b>	<b>95 191</b>	<b>5 733</b>	<b>13 908</b>	<b>14 135</b>	<b>178 269</b>	<b>12 794</b>	<b>36 536</b>	<b>227 599</b>	
<b>A.1 Characteristic products</b>	<b>39 161</b>	<b>10 142</b>	<b>95 191</b>	<b>5 733</b>	<b>13 908</b>	<b>14 135</b>	<b>178 269</b>		<b>15 387</b>	<b>193 656</b>	
1. Accommodation services	35 388					936	36 324		6 126	42 450	
1.1 Hotel and other accommodation for visitors other than 1.2	35 388					936	36 324		6 126	42 450	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 773	10 142				63	13 978		5 731	19 709	
3. Passenger transport services			95 191	5 733			100 924		3 530	104 453	
3.1 Railway passenger transport services			691				691			691	
3.2 Road passenger transport services			54 654				54 654		3 530	58 183	
3.3 Water passenger transport services			24				24			24	
3.4 Air passenger transport services			39 822				39 822			39 822	
3.5 Passenger transport equipment rental				5 733			5 733			5 733	
4. Travel agencies and other reservation services					13 908		13 908			13 908	
5. Cultural industry						449	449			449	
6. Sports and recreational industry						12 687	12 687			12 687	
<b>A.2 Connected products</b>								<b>12 794</b>	<b>21 149</b>	<b>33 944</b>	
Retail sales of food, beverages and tobacco								5 688	12 617	18 305	
Retail sales of textiles, clothing, footwear and leather products								2 047	6 142	8 190	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								235	123	358	
Retail sales of household furniture, appliances, articles and equipment								1 499	687	2 185	
Retail sales of automotive fuel								3 325	1 581	4 906	
<b>B. Non-specific products</b>	<b>14 101</b>	<b>2</b>	<b>13</b>	<b>1</b>	<b>10</b>	<b>28</b>	<b>14 156</b>	<b>5</b>	<b>31 473</b>	<b>45 633</b>	
<b>Total output (at basic prices)</b>	<b>53 262</b>	<b>10 143</b>	<b>95 205</b>	<b>5 734</b>	<b>13 918</b>	<b>14 164</b>	<b>192 425</b>	<b>12 799</b>	<b>68 008</b>	<b>273 233</b>	<b>11 717</b>
<b>Total intermediate consumption (at purchasers' prices)</b>	<b>31 411</b>	<b>6 402</b>	<b>52 303</b>	<b>4 047</b>	<b>8 191</b>	<b>10 376</b>	<b>112 730</b>	<b>5 821</b>	<b>36 236</b>	<b>154 787</b>	
<b>Total gross value added (at basic prices)</b>	<b>21 851</b>	<b>3 741</b>	<b>42 900</b>	<b>1 687</b>	<b>5 727</b>	<b>3 787</b>	<b>79 695</b>	<b>6 978</b>	<b>31 772</b>	<b>118 446</b>	

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

Table 13a: Derivation of tourism industry ratios, 2016 (R million)

Product	Tourism-characteristic industries										Tourism-connected industries
	Accommodation for visitors	Food and beverage-serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
<b>A. Specific products</b>	<b>35 619</b>	<b>8 998</b>	<b>606</b>	<b>50 576</b>	<b>20</b>	<b>35 618</b>	<b>5 176</b>	<b>12 215</b>	<b>1 078</b>	<b>11 448</b>	<b>11 295</b>
<b>A.1 Characteristic products</b>	<b>35 619</b>	<b>8 998</b>	<b>606</b>	<b>50 576</b>	<b>20</b>	<b>35 618</b>	<b>5 176</b>	<b>12 215</b>	<b>1 078</b>	<b>11 448</b>	
1. Accommodation services	32 147								675	169	
1.1 Hotel and other accommodation for visitors other than 1.2	32 147								675	169	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 473	8 998							3	55	
3. Passenger transport services			606	50 576	20	35 618	5 176				
3.1 Railway passenger transport services			606								
3.2 Road passenger transport services				50 576							
3.3 Water passenger transport services					20						
3.4 Air passenger transport services						35 618					
3.5 Passenger transport equipment rental							5 176				
4. Travel agencies and other reservation services								12 215			
5. Cultural industry									401		
6. Sports and recreational industry										11 225	
<b>A.2 Connected products</b>											<b>11 295</b>
Retail sales of food, beverages and tobacco											4 833
Retail sales of textiles, clothing, footwear and leather products											2 011
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											208
Retail sales of household furniture, appliances, articles and equipment											1 296
Retail sales of automotive fuel											2 946
<b>B. Non-specific products</b>	<b>12 870</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>-</b>	<b>8</b>	<b>1</b>	<b>9</b>	<b>1</b>	<b>24</b>	<b>5</b>
<b>Total purchased by visitors</b>	<b>48 489</b>	<b>9 000</b>	<b>608</b>	<b>50 579</b>	<b>20</b>	<b>35 626</b>	<b>5 177</b>	<b>12 224</b>	<b>1 078</b>	<b>11 473</b>	<b>11 299</b>
<b>Total industry output</b>	<b>61 575</b>	<b>24 297</b>	<b>9 038</b>	<b>142 220</b>	<b>41</b>	<b>40 066</b>	<b>7 926</b>	<b>12 474</b>	<b>2 925</b>	<b>42 175</b>	<b>139 549</b>
<b>Tourism industry ratio (%)</b>	<b>79</b>	<b>37</b>	<b>7</b>	<b>36</b>	<b>49</b>	<b>89</b>	<b>65</b>	<b>98</b>	<b>37</b>	<b>27</b>	<b>8</b>

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

Table 13b: Derivation of tourism industry ratios, 2017 (R million)

Product	Tourism-characteristic industries										Tourism-connected industries
	Accommodation for visitors	Food and beverage-serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
<b>A. Specific products</b>	36 595	8 915	663	46 854	23	38 058	5 461	13 390	1 087	11 304	11 157
<b>A.1 Characteristic products</b>	36 595	8 915	663	46 854	23	38 058	5 461	13 390	1 087	11 304	
1. Accommodation services	33 279								699	175	
1.1 Hotel and other accommodation for visitors other than 1.2	33 279								699	175	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 316	8 915							3	52	
3. Passenger transport services			663	46 854	23	38 058	5 461				
3.1 Railway passenger transport services			663								
3.2 Road passenger transport services				46 854							
3.3 Water passenger transport services					23						
3.4 Air passenger transport services						38 058					
3.5 Passenger transport equipment rental							5 461				
4. Travel agencies and other reservation services								13 390			
5. Cultural industry									385		
6. Sports and recreational industry										11 077	
<b>A.2 Connected products</b>											11 157
Retail sales of food, beverages and tobacco											4 517
Retail sales of textiles, clothing, footwear and leather products											1 928
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											207
Retail sales of household furniture, appliances, articles and equipment											1 321
Retail sales of automotive fuel											3 185
<b>B. Non-specific products</b>	13 505	1	1	3	0	9	1	10	1	26	4
<b>Total purchased by visitors</b>	50 100	8 916	665	46 857	23	38 067	5 461	13 400	1 088	11 330	11 162
<b>Total industry output</b>	65 005	26 565	9 891	147 360	51	43 106	8 478	13 674	3 094	44 600	150 118
<b>Tourism industry ratio (%)</b>	77	34	7	32	45	88	64	98	35	25	7

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

Table 13c: Derivation of tourism industry ratios, 2018 (R million)

Product	Tourism-characteristic industries										Tourism-connected industries
	Accommodation for visitors	Food and beverage-serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
<b>A. Specific products</b>	39 161	10 142	691	54 654	24	39 822	5 733	13 908	1 201	12 934	12 794
<b>A.1 Characteristic products</b>	39 161	10 142	691	54 654	24	39 822	5 733	13 908	1 201	12 934	
1. Accommodation services	35 388								749	187	
1.1 Hotel and other accommodation for visitors other than 1.2	35 388								749	187	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	3 773	10 142							3	60	
3. Passenger transport services			691	54 654	24	39 822	5 733				
3.1 Railway passenger transport services			691								
3.2 Road passenger transport services				54 654							
3.3 Water passenger transport services					24						
3.4 Air passenger transport services						39 822					
3.5 Passenger transport equipment rental							5 733				
4. Travel agencies and other reservation services								13 908			
5. Cultural industry									449		
6. Sports and recreational industry										12 687	
<b>A.2 Connected products</b>											12 794
Retail sales of food, beverages and tobacco											5 688
Retail sales of textiles, clothing, footwear and leather products											2 047
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											235
Retail sales of household furniture, appliances, articles and equipment											1 499
Retail sales of automotive fuel											3 325
<b>B. Non-specific products</b>	14 101	2	1	3	0	9	1	10	1	27	5
<b>Total purchased by visitors</b>	53 262	10 143	693	54 657	24	39 831	5 734	13 918	1 203	12 961	12 799
<b>Total industry output</b>	67 875	27 738	10 273	153 053	53	44 799	8 762	14 202	3 257	46 960	156 745
<b>Tourism industry ratio (%)</b>	78	37	7	36	45	89	65	98	37	28	8

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

Table 6<sup>15</sup> of the TSA (see Figure 1) presents the reconciliation between internal tourism consumption and domestic supply, and it is from this table that TDGVA and 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 GDVATI 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 TDGVA.<sup>16</sup> 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 aggregates.<sup>17</sup> Table 14 shows the relationship between the different economic aggregates that characterise the magnitude of tourism from the point of view of supply. Figure 6 explains schematically the link between GDVATI and TDGVA.

**Table 14: Relationship between the different economic aggregates that characterise the magnitude of tourism from the point of view of supply**

	Gross value added of the tourism industries	Tourism direct gross value added	Tourism direct gross domestic product
Gross value added (at basic prices) generated by the supply to visitors by the tourism industries	Yes	Yes	Yes
Gross value added (at basic prices) generated by the supply to non-visitors by the tourism industries	Yes	No	No
Gross value added (at basic prices) generated by the supply to visitors by other industries	No	Yes	Yes
Gross value added (at basic prices) generated by the supply to non-visitors by other industries	No	No	No
Net taxes on products and imports included in the value of internal tourism consumption (at purchasers' prices)	No	No	Yes

Source: Tourism Satellite Account: Recommended Methodological Framework.

<sup>15</sup> This table is the core of the TSA.

<sup>16</sup> TSA: RMF

<sup>17</sup> TSA: RMF

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

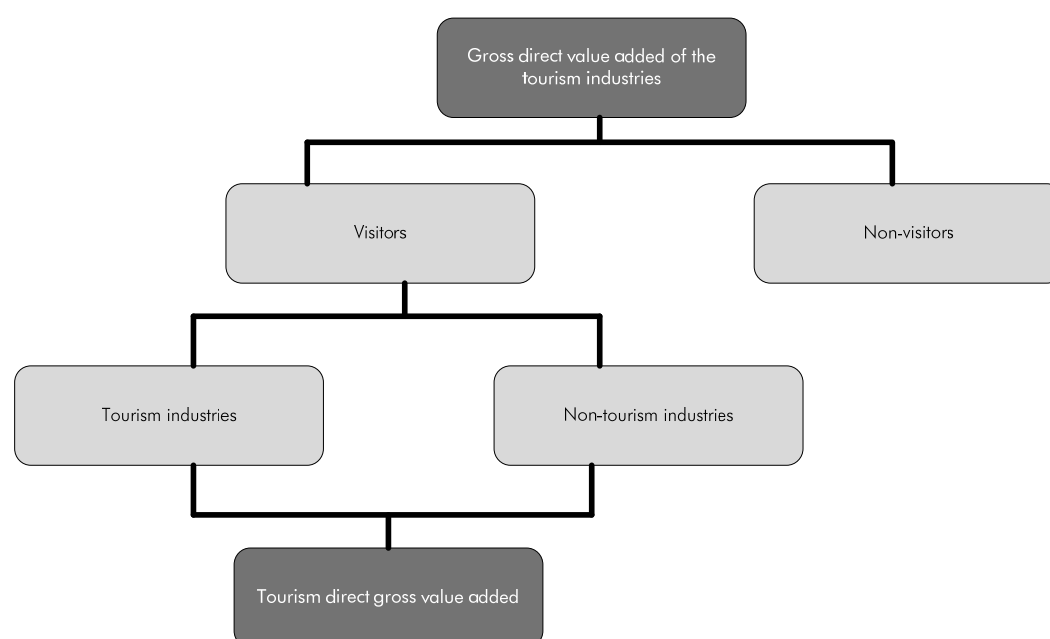


Table 15 shows the calculation of TDGVA and TDGDP for South Africa for 2014 to 2018. TDGDP was R130 163 million (or 2,7% of total GDP) in 2018.

Table 15: Tourism direct gross value added and tourism direct gross domestic product, 2014–2018 (R million)

	2014	2015	2016	2017	2018
Total supply of goods and services	9 163 298	9 623 644	10 241 394	10 763 912	11 269 431
Less imports of goods and services	1 254 466	1 273 933	1 310 214	1 319 114	1 440 883
Less net taxes (taxes less subsidies) on products	389 616	425 707	467 502	480 251	532 607
<b>Equals total domestic supply of goods and services (output)</b>	<b>7 519 216</b>	<b>7 924 004</b>	<b>8 463 677</b>	<b>8 964 547</b>	<b>9 295 941</b>
Less intermediate consumption	4 101 156	4 298 289	4 572 122	4 791 222	4 954 649
Gross value added of the economy	3 418 061	3 625 714	3 891 555	4 173 325	4 341 292
Total tourism output	240 718	231 595	265 216	251 206	273 233
Less					
Total tourism intermediate consumption	136 718	131 458	150 591	142 794	154 787
<b>Equals tourism direct gross value added (TDGVA)</b>	<b>104 000</b>	<b>100 137</b>	<b>114 626</b>	<b>108 412</b>	<b>118 446</b>
<b>TDGVA (% of GVA)</b>	<b>3,0</b>	<b>2,8</b>	<b>2,9</b>	<b>2,6</b>	<b>2,7</b>
Tourism direct gross value added	104 000	100 137	114 626	108 412	118 446
Plus					
Tourism share of net taxes on products	8 572	9 366	10 285	10 566	11 717
<b>Equals tourism direct gross domestic product (TDGDP)</b>	<b>112 571</b>	<b>109 503</b>	<b>124 911</b>	<b>118 977</b>	<b>130 163</b>
<b>TDGDP<sup>18</sup> (% of GDP)</b>	<b>3,0</b>	<b>2,7</b>	<b>2,9</b>	<b>2,6</b>	<b>2,7</b>

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

Table 16 and Table 17 as well as Figure 7 show TDGVA for 2014 to 2018 (R million and percentage contribution).

Table 16: Tourism direct gross value added, 2014–2018 (R million)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	17 565	18 714	19 843	20 554	21 851
Food and beverage-serving industry	2 849	2 981	3 278	3 289	3 741
Railway passenger transport	357	355	373	411	428
Road passenger transport	25 595	23 684	26 367	24 659	28 763
Water passenger transport	6	8	10	10	10
Air passenger transport	10 065	11 275	12 193	13 100	13 699
Transport equipment rental	1 366	1 477	1 485	1 607	1 687
Travel agencies and other reservation services industry	4 118	4 622	5 048	5 514	5 727
Cultural industry	100	94	289	291	322
Sports and recreational industry	2 842	2 815	3 067	3 029	3 465
Retail trade of tourism-connected goods	5 625	5 620	6 053	6 085	6 978
Other non-tourism industries	33 511	28 492	36 619	29 863	31 772
<b>Total</b>	<b>104 000</b>	<b>100 137</b>	<b>114 626</b>	<b>108 412</b>	<b>118 446</b>

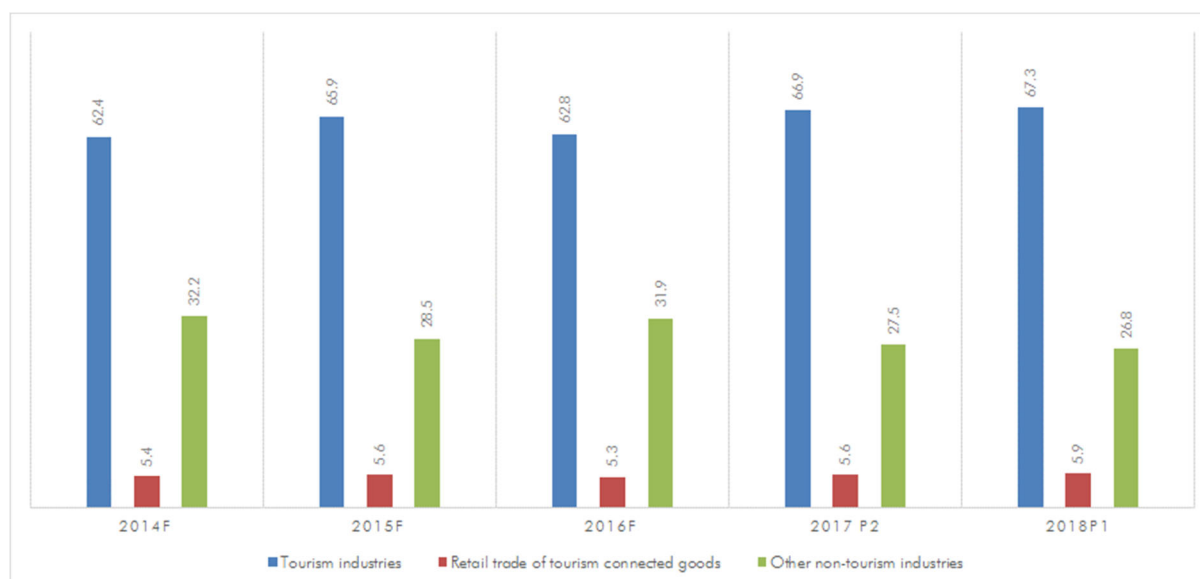
Individual figures may not add up to stated totals due to rounding.

Table 17: Tourism direct gross value added, 2014–2018 (%)

Tourism product	2014	2015	2016	2017	2018
Accommodation for visitors	16,9	18,7	17,3	19,0	18,4
Food and beverage-serving industry	2,7	3,0	2,9	3,0	3,2
Railway passenger transport	0,3	0,4	0,3	0,4	0,4
Road passenger transport	24,6	23,7	23,0	22,7	24,3
Water passenger transport	0,0	0,0	0,0	0,0	0,0
Air passenger transport	9,7	11,3	10,6	12,1	11,6
Transport equipment rental	1,3	1,5	1,3	1,5	1,4
Travel agencies and other reservation services industry	4,0	4,6	4,4	5,1	4,8
Cultural industry	0,1	0,1	0,3	0,3	0,3
Sports and recreational industry	2,7	2,8	2,7	2,8	2,9
Retail trade of tourism-connected goods	5,4	5,6	5,3	5,6	5,9
Other non-tourism industries	32,2	28,5	31,9	27,5	26,8
<b>Total</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>

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

Figure 7: Tourism direct gross value added, 2014–2018 (% contribution)



Source: Statistics South Africa



### 3.4 Employment in the tourism industries

Tourism employment is the employment strictly related to the goods and services (tourism-connected and non-tourism-connected) acquired by visitors and produced either by tourism industries or other industries that cannot be directly observed.<sup>19</sup> 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 visitors and non-visitors.

Tables 18a to 18c show employment in the tourism industries by population group and gender for the reference years 2016 to 2018. There were 705 871 persons (or 4,5% of total employment) directly engaged in producing goods and services purchased by visitors in 2016, 681 619 persons (or 4,2% of total employment) in 2017 and 739 657 (or 4,5% of total employment) in 2018. Tourism industry ratios have been used to allocate employment numbers (by industry) to tourism.<sup>20</sup>

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<sup>19</sup> TSA: RMF

<sup>20</sup> 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 visitors or non-visitors.

Table 18a: Employment in the tourism industries by population group and gender, 2016 (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
<b>Total employment</b>												
Black African	125 497	317 499	57 742	470 405	205	15 566	10 246	17 902	57 776	42 722	972 226	2 087 785
Male	58 589	102 354	37 637	436 279	205	8 084	7 562	12 383	40 707	23 376	478 572	1 205 748
Female	66 908	215 145	20 105	34 126	0	7 482	2 685	5 519	17 069	19 345	493 654	882 037
Coloured	20 240	43 817	5 778	44 510	346	3 771	844	4 384	15 314	6 949	154 464	300 417
Male	4 591	14 116	5 460	37 304	346	1 751	540	3 137	9 016	4 642	60 438	141 341
Female	15 649	29 701	318	7 206	0	2 020	305	1 247	6 298	2 307	94 026	159 076
Indian/Asian	5 909	7 380	3 416	19 606	670	1 372	0	2 621	2 155	1 291	84 712	129 132
Male	2 254	5 777	3 008	15 888	462	1 372	0	2 118	1 024	1 087	60 256	93 246
Female	3 655	1 602	409	3 718	207	0	0	503	1 131	204	24 456	35 886
White	11 867	25 699	10 220	33 619	310	5 440	1 256	6 469	21 616	11 762	124 846	253 104
Male	6 810	11 591	7 636	21 287	310	3 959	967	3 579	12 102	6 519	67 755	142 515
Female	5 057	14 108	2 584	12 331	0	1 481	289	2 891	9 514	5 243	57 091	110 589
<b>Total</b>	<b>163 514</b>	<b>394 394</b>	<b>77 156</b>	<b>568 140</b>	<b>1 530</b>	<b>26 148</b>	<b>12 347</b>	<b>31 376</b>	<b>96 861</b>	<b>62 724</b>	<b>1 336 249</b>	<b>2 770 439</b>

Individual figures may not add up to stated totals due to rounding.  
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2016*

Table 18a: Employment in the tourism industries by population group and gender, 2016 (No. of persons) (concluded)

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
<b>Tourism industry ratio (%)</b>	<b>79</b>	<b>37</b>	<b>7</b>	<b>36</b>	<b>49</b>	<b>89</b>	<b>65</b>	<b>98</b>	<b>37</b>	<b>27</b>	<b>8</b>	
<b>Tourism employment</b>												
Black African	98 825	117 600	3 887	167 295	100	13 841	6 692	17 544	21 299	11 621	78 720	537 425
Male	46 137	37 911	2 534	155 159	100	7 188	4 939	12 135	15 006	6 359	38 749	326 218
Female	52 688	79 689	1 353	12 137	0	6 653	1 754	5 409	6 293	5 262	39 971	211 207
Coloured	15 938	16 230	389	15 830	169	3 353	552	4 297	5 646	1 890	12 507	76 800
Male	3 615	5 229	368	13 267	169	1 557	352	3 074	3 324	1 263	4 894	37 112
Female	12 323	11 001	21	2 563	0	1 796	199	1 222	2 322	628	7 613	39 688
Indian/Asian	4 653	2 733	230	6 973	328	1 220	0	2 569	794	351	6 859	26 711
Male	1 775	2 140	202	5 650	227	1 220	0	2 076	377	296	4 879	18 842
Female	2 878	594	28	1 322	102	0	0	493	417	56	1 980	7 869
White	9 345	9 519	688	11 956	152	4 837	821	6 340	7 969	3 200	10 109	64 934
Male	5 363	4 293	514	7 571	152	3 520	632	3 507	4 462	1 773	5 486	37 272
Female	3 982	5 225	174	4 385	0	1 317	189	2 833	3 507	1 426	4 623	27 662
<b>Total</b>	<b>128 763</b>	<b>146 082</b>	<b>5 194</b>	<b>202 054</b>	<b>750</b>	<b>23 251</b>	<b>8 065</b>	<b>30 749</b>	<b>35 708</b>	<b>17 062</b>	<b>108 194</b>	<b>705 871</b>

Individual figures may not add up to stated totals due to rounding.  
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2016*

Table 18b: Employment in the tourism industries by population group and gender, 2017 (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
<b>Total employment</b>												
Black African	130 082	309 082	59 647	511 878	1 506	15 340	10 859	18 102	58 901	52 879	983 709	2 151 984
Male	51 767	111 795	42 526	467 725	964	7 721	9 332	12 253	40 020	23 284	471 324	1 238 712
Female	78 314	197 287	17 121	44 153	541	7 619	1 527	5 849	18 881	29 595	512 386	913 272
Coloured	20 937	34 310	3 688	44 892	2 015	1 947	2 060	4 221	8 367	7 180	160 727	290 343
Male	6 751	10 280	3 335	38 821	870	910	0	3 154	4 024	4 641	65 917	138 703
Female	14 186	24 030	353	6 071	1 145	1 037	2 060	1 067	4 343	2 538	94 810	151 641
Indian/Asian	2 929	8 716	1 158	27 850	1 670	2 148	0	1 997	2 365	3 178	76 480	128 493
Male	1 070	7 080	871	21 857	1 670	2 148	0	1 330	405	2 670	55 096	94 199
Female	1 859	1 636	287	5 993	0	0	0	667	1 960	508	21 384	34 294
White	16 593	34 652	9 388	29 110	1 376	10 308	1 981	7 272	22 593	11 104	112 825	257 202
Male	7 825	14 717	9 248	20 623	402	7 107	948	4 130	12 541	5 825	65 300	148 667
Female	8 768	19 935	140	8 487	973	3 201	1 034	3 143	10 052	5 278	47 525	108 536
<b>Total</b>	<b>170 540</b>	<b>386 760</b>	<b>73 881</b>	<b>613 731</b>	<b>6 567</b>	<b>29 742</b>	<b>14 900</b>	<b>31 592</b>	<b>92 227</b>	<b>74 340</b>	<b>1 333 742</b>	<b>2 828 023</b>

Individual figures may not add up to stated totals due to rounding.  
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2017*

Table 18b: Employment in the tourism industries by population group and gender, 2017 (No. of persons) (concluded)

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
<b>Tourism industry ratio (%)</b>	<b>77</b>	<b>34</b>	<b>7</b>	<b>32</b>	<b>45</b>	<b>88</b>	<b>64</b>	<b>98</b>	<b>35</b>	<b>25</b>	<b>7</b>	
<b>Tourism employment</b>												
Black African	100 255	103 741	4 009	162 764	676	13 547	6 995	17 740	20 713	13 433	73 141	517 012
Male	39 898	37 523	2 858	148 724	433	6 818	6 011	12 008	14 073	5 915	35 044	309 305
Female	60 358	66 217	1 151	14 039	243	6 728	984	5 732	6 640	7 518	38 097	207 706
Coloured	16 137	11 516	248	14 275	904	1 719	1 327	4 136	2 942	1 824	11 950	66 978
Male	5 203	3 450	224	12 344	390	804	0	3 091	1 415	1 179	4 901	33 002
Female	10 933	8 065	24	1 931	514	915	1 327	1 046	1 527	645	7 049	33 977
Indian/Asian	2 257	2 925	78	8 856	750	1 897	0	1 957	832	807	5 686	26 045
Male	824	2 376	59	6 950	750	1 897	0	1 304	142	678	4 097	19 077
Female	1 433	549	19	1 906	0	0	0	653	689	129	1 590	6 969
White	12 788	11 631	631	9 256	617	9 103	1 276	7 127	7 945	2 821	8 389	71 584
Male	6 031	4 940	622	6 558	181	6 276	610	4 047	4 410	1 480	4 855	40 009
Female	6 757	6 691	9	2 699	437	2 827	666	3 080	3 535	1 341	3 534	31 575
<b>Total</b>	<b>131 437</b>	<b>129 812</b>	<b>4 965</b>	<b>195 150</b>	<b>2 947</b>	<b>26 265</b>	<b>9 598</b>	<b>30 960</b>	<b>32 432</b>	<b>18 884</b>	<b>99 167</b>	<b>681 619</b>

Individual figures may not add up to stated totals due to rounding.  
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2017*

Table 18c: Employment in the tourism industries by population group and gender, 2018 (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
<b>Total employment</b>												
Black African	124 756	295 831	48 891	518 376	1 148	18 327	13 884	20 127	55 967	59 073	1 008 927	2 165 307
Male	51 986	102 024	35 984	469 928	395	7 451	11 601	13 929	32 473	33 524	493 616	1 252 913
Female	72 770	193 807	12 907	48 449	752	10 877	2 283	6 198	23 493	25 549	515 311	912 394
Coloured	18 877	35 064	7 195	45 766	540	3 894	3 071	4 622	9 616	9 472	174 487	312 605
Male	6 646	12 383	5 475	38 988	204	2 403	1 556	2 645	6 307	4 822	77 890	159 320
Female	12 232	22 680	1 720	6 778	336	1 491	1 516	1 977	3 309	4 650	96 597	153 286
Indian/Asian	298	9 638	2 342	22 077	1 842	175	0	1 978	1 678	2 269	79 909	122 207
Male	137	5 943	2 342	18 189	1 121	175	0	1 283	1 296	1 402	53 437	85 324
Female	161	3 695	0	3 888	721	0	0	695	382	867	26 473	36 882
White	19 225	40 255	10 117	37 301	362	7 854	2 469	5 229	28 167	15 144	126 062	292 184
Male	8 393	22 006	9 287	28 562	0	5 782	2 469	2 453	16 337	9 079	64 784	169 151
Female	10 832	18 249	830	8 739	362	2 073	0	2 777	11 829	6 065	61 277	123 033
<b>Total</b>	<b>163 157</b>	<b>380 788</b>	<b>68 545</b>	<b>623 521</b>	<b>3 892</b>	<b>30 250</b>	<b>19 424</b>	<b>31 957</b>	<b>95 427</b>	<b>85 957</b>	<b>1 389 385</b>	<b>2 892 303</b>

Individual figures may not add up to stated totals due to rounding.  
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2018*

Table 18c: Employment in the tourism industries by population group and gender, 2018 (No. of persons) (concluded)

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
<b>Tourism industry ratio (%)</b>	<b>78</b>	<b>37</b>	<b>7</b>	<b>36</b>	<b>45</b>	<b>89</b>	<b>65</b>	<b>98</b>	<b>37</b>	<b>28</b>	<b>8</b>	
<b>Tourism employment</b>												
Black African	97 897	108 182	3 296	185 118	517	16 295	9 085	19 275	20 666	16 305	82 384	559 470
Male	40 794	37 309	2 426	167 816	178	6 624	7 591	13 651	11 991	9 253	40 307	337 940
Female	57 103	70 873	870	17 301	339	9 671	1 494	6 074	8 675	7 052	42 078	221 530
Coloured	14 813	12 822	485	16 344	244	3 462	2 010	4 530	3 551	2 614	14 248	75 122
Male	5 215	4 528	369	13 923	92	2 137	1 018	2 592	2 329	1 331	6 360	39 895
Female	9 598	8 294	116	2 421	152	1 325	992	1 937	1 222	1 283	7 888	35 228
Indian/Asian	234	3 525	158	7 884	830	155	0	1 938	619	626	6 525	22 495
Male	108	2 173	158	6 495	505	155	0	1 257	478	387	4 363	16 081
Female	126	1 351	0	1 389	325	0	0	681	141	239	2 162	6 414
White	15 086	14 721	682	13 321	163	6 983	1 616	5 125	10 400	4 180	10 294	82 570
Male	6 586	8 047	626	10 200	0	5 141	1 616	2 404	6 033	2 506	5 290	48 447
Female	8 500	6 673	56	3 121	163	1 843	0	2 721	4 368	1 674	5 004	34 123
<b>Total</b>	<b>128 031</b>	<b>139 250</b>	<b>4 621</b>	<b>222 666</b>	<b>1 754</b>	<b>26 896</b>	<b>12 711</b>	<b>31 318</b>	<b>35 236</b>	<b>23 725</b>	<b>113 451</b>	<b>739 657</b>

Individual figures may not add up to stated totals due to rounding.  
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2018*

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

In accordance with the recommendations set out by the 2008 TSA: RMF, the South African TSA for the reference years 2016 to 2018 focused on the compilation of Tables 1–7 and Table 10.

The next TSA report for South Africa will be the result for the reference years 2017 to 2019, and is scheduled to be published by the end of November 2020. 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 Riaan Grobler: [RiaanG@statssa.gov.za](mailto: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 the CPC, Version 2.0 and has been drawn from it, but if the sixth digit is not a zero, the item corresponds only partly to the CPC code. For example, code 63110.0, 'Hotel and motel lodging services', is identical to CPC code 63110, whereas code 63199.1, 'Sleeping-car....', corresponds only in part to CPC code 63199.

#### 1. Accommodation services

##### 1.1 Hotels and other lodging services

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

##### 1.2 Second-home services on own account or for free

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

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

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

#### 3. Passenger transport services

##### 3.1 Inter-urban railway transport services

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

## 3.2 Road transport services

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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

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## 3.3 Water transport services

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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

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## 3.4 Air transport services

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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

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## 3.5 Supporting passenger transport services

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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

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## 3.6 Passenger transport equipment rental

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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

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## 3.7 Maintenance and repair services of passenger transport equipment

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

## 4. Travel agency, tour operator and tourist guide services

## 4.1 Travel agency services

67811.0	Travel agency services
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## 4.2 Tour operator services

67812.0	Tour operator services
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## 4.3 Tourist information and tourist guide services

67813.0	Tourist information services
67820.0	Tourist guide services

## 5. Cultural services

## 5.1 Performing arts

96230.0	Performing arts facility operation services
96310.0	Services of performing artists

## 5.2 Museum and other cultural services

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

## 6. Recreation and other entertainment services

## 6.1 Sports and recreational services

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

## 6.2 Other amusement and recreational services

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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

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## 7. Miscellaneous tourism services

### 7.1 Financial and insurance services

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

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### 7.2 Other rental services

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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

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### 7.3 Other tourism services

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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

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## 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 Standard Industrial Classification of Tourism Activities (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 TSA.<sup>21</sup> 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, 2016 ('000)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors
Number of trips or visits (*)	10 044 163	5 077 165	15 121 328	42 802 000	39 389 000	82 191 000	-	-	-
Number of bed nights	-	-	-	14 763 000	-	-	-	-	-

(\*) 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, 2017 ('000)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors
Number of trips or visits (*)	10 285 197	4 690 478	14 975 675	44 380 000	47 540 000	91 920 000	-	-	-
Number of bed nights	-	-	-	15 810 000	-	-	-	-	-

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

<sup>21</sup> TSA: RMF

Table B3: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2018 ('000)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors
Number of trips or visits (*)	10 472 105	4 532 279	15 004 384	45 466 000	41 634 000	87 100 000	-	-	-
Number of bed nights	-	-	-	22 350 000	-	-	-	-	-

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

Table C: TSA Table 10b – Number of trips and overnights by mode of transport

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

Table D1: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2016

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 855	7 254	-	-
Capacity (stay units)	82 400	43 400	-	-
Stay unit nights sold	16 001 200	8 699 900	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	53,1%	44,3%	-	-
Capacity utilisation (beds)	-	-	-	-



Table D2: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2017

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	3 005	7 472	-	-
Capacity (stay units)	82 700	43 400	-	-
Stay unit nights sold	15 763 500	8 543 900	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	52,2%	44,3%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D3: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2018

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	3 003	7 486	-	-
Capacity (stay units)	83 000	43 400	-	-
Stay unit nights sold	15 556 700	8 077 700	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	51,4%	43,2%	-	-
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	50-99	100-249	250-499	500-999	>1000	Total
1 – Accommodation for visitors										
1.a – Accommodation services for visitors other than 1.b										
1.b – Accommodation services associated with all types of vacation home ownership										
2 – Food and beverage-serving industry										
3 – Railway passenger transport										
4 – Road passenger transport										
5 – Water passenger transport										
6 – Air passenger transport										
7 – Transport equipment rental										
8 – Travel agencies and other reservation services										
9 – Cultural industry										
10 – Sports and recreational industry										
11 – Retail trade of country-specific tourism characteristic goods										
12 – Country-specific tourism industries										
<b>Total establishments</b>										

## 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/her 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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