



stats sa

Department:
Statistics South Africa
REPUBLIC OF SOUTH AFRICA

Private Bag X44, Pretoria, 0001, South Africa, ISibalo House, Koch Street, Salvokop, Pretoria, 0002
www.statssa.gov.za, info@statssa.gov.za, Tel +27 12 310 8911

Tourism Satellite Account for South Africa, final 2017 and provisional 2018 and 2019

Embargoed until:
30 November 2021
14:30

Report No. 04-05-07 (2021)

Statistics South Africa

Risenga Maluleke
Statistician-General

Tourism Satellite Account for South Africa, final 2017 and provisional 2018 and 2019 / Statistics South Africa

Published by Statistics South Africa, Private Bag X44, Pretoria 0001

© Statistics South Africa, 2021

Users may apply or process this data provided that Statistics South Africa (Stats SA) is acknowledged as the original source of the data; that it is specified that the application and/or analysis is the result of the user's independent processing of the data; and that neither the basic data nor any reprocessed version or application thereof may be sold or offered for sale in any form whatsoever without prior permission from Stats SA.

Stats SA Library Cataloguing-in-Publication (CIP) Data

Tourism Satellite Account for South Africa, final 2017 and provisional 2018 and 2019 / Statistics South Africa
Pretoria: Statistics South Africa, 2021

Report No. 04-05-07 (2021)

74 pages

ISBN: 978-0-621-49897-4

A complete set of Stats SA publications is available at the Stats SA Library and the following libraries:

National Library of South Africa, Pretoria Division
National Library of South Africa, Cape Town Division
Library of Parliament, Cape Town
Bloemfontein Public Library
Natal Society Library, Pietermaritzburg
Johannesburg Public Library
Eastern Cape Library Services, Qonce
Central Regional Library, Polokwane
Central Reference Library, Mbombela
Central Reference Collection, Kimberley
Central Reference Library, Mmabatho

This report is available on the Stats SA website: www.statssa.gov.za

For technical enquiries, contact Riaan Grobler

Telephone: 012 310 8474 / 082 515 2908

Email: riaang@statssa.gov.za

Preface

The Tourism Satellite Account (TSA), final 2017 and provisional 2018 and 2019 covers updated and new provisional figures for the reference years 2018 and 2019 as well as the final results for 2017. It provides an overview of the role that tourism plays in South Africa and provides information on the contribution of tourism to the South African economy in terms of production, 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 understanding and monitoring the impact of tourism on the South African economy over time. The other elements of the STS for South Africa include surveys of international visitors and domestic visitors, visitor arrival statistics, tourist accommodation, and food and beverages.



Risenga Maluleke
Statistician-General
Pretoria

November 2021

Contents

Preface.....	i
Chapter 1: Introduction.....	9
1.1 The importance of a Tourism Satellite Account.....	9
1.2 Relationships between the Tourism Satellite Account and the System of National Accounts.....	10
Chapter 2: Data sources.....	13
Chapter 3: Tourism Satellite Account for South Africa, final 2017 and provisional 2018 and 2019.....	17
3.1 Tourism expenditure.....	17
3.2 Production accounts.....	29
3.3 Domestic supply and internal tourism consumption by product.....	33
3.4 Employment in the tourism industries.....	44
Chapter 4: The future development of the Tourism Satellite Account for South Africa.....	51
Annexures.....	52
Glossary.....	62
Related Tourism Satellite Account publications.....	66

List of tables

Table A – Comparison of previous and revised GDP estimates.....	4
Table B – Comparison of SAT and Stats SA domestic tourism surveys for annual number of domestic trips and annual total domestic spend, 2013 to 2019.....	7
Table 1: Data sources used for compilation of the Tourism Satellite Account for South Africa at Stats SA.....	13
Table 2: Data sources used for compilation of the Tourism Satellite Account for South Africa at South African Tourism	15
Table 3a: Tourism expenditure by product, 2017.....	18
Table 3b: Tourism expenditure by product, 2018.....	19
Table 3c: Tourism expenditure by product, 2019.....	20
Table 4: The Tourism Balance of Payments for South Africa, 2005–2019.....	22
Table 5: Inbound tourism expenditure by type of product, 2015–2019 (R million).....	24
Table 6: Inbound tourism expenditure by type of product, 2015–2019 (%).....	24
Table 7: Domestic tourism expenditure by type of product, 2015–2019 (R million).....	26
Table 8: Domestic tourism expenditure by type of product, 2015–2019 (%).....	26
Table 9: Internal tourism expenditure by type of product, 2015–2019 (R million).....	28
Table 10: Internal tourism expenditure by type of product, 2015–2019 (%).....	28
Table 11a: Production accounts of the tourism industries and other industries (at basic prices), 2017 (R million).....	30
Table 11b: Production accounts of the tourism industries and other industries (at basic prices), 2018 (R million).....	31
Table 11c: Production accounts of the tourism industries and other industries (at basic prices), 2019 (R million).....	32
Table 12a: Internal tourism consumption by product, 2017 (R million).....	34
Table 12b: Internal tourism consumption by product, 2018 (R million).....	35
Table 12c: Internal tourism consumption by product, 2019 (R million).....	36

Table 13a: Derivation of tourism industry ratios, 2017 (R million).....	37
Table 13b: Derivation of tourism industry ratios, 2018 (R million).....	38
Table 13c: Derivation of tourism industry ratios, 2019 (R million).....	39
Table 14: Relationships between the different economic aggregates that characterise the magnitude of tourism from the point of view of supply.....	40
Table 15: Tourism direct gross value added and tourism direct gross domestic product, 2015–2019 (R million).....	41
Table 16: Tourism direct gross value added, 2015–2019 (R million).....	42
Table 17: Tourism direct gross value added, 2015–2019 (%).....	42
Table 18a: Employment in the tourism industries by population group and gender, 2017 (No. of persons).....	45
Table 18b: Employment in the tourism industries by population group and gender, 2018 (No. of persons).....	47
Table 18c: Employment in the tourism industries by population group and gender, 2019 (No. of persons).....	49
Table A1: List of tourism-characteristic activities.....	56
Table B1: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2017 ('000).....	57
Table B2: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2018 ('000).....	57
Table B3: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2019 ('000).....	58
Table C: TSA Table 10b – Number of trips and overnights by mode of transport.....	59
Table D1: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2017.....	59
Table D2: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2018.....	60
Table D3: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2019.....	60
Table E: TSA Table 10d – Number of establishments in tourism industries classified according to average number of employed persons.....	61

List of figures

Figure A – Real GDP growth rate.....	3
Figure B – Level of GDP at current prices.....	4
Figure C – Components of value added in 2015 base year.....	5
Figure D – Components of expenditure on GDP in 2015 base year.....	5
Figure 1: The 10 tables of a Tourism Satellite Account.....	11
Figure 2: The Tourism Balance of Payments for South Africa, 2005–2019 (R million).....	22
Figure 3: Inbound tourism expenditure: Annual growth rate at current prices, 2015–2019 (%).....	25
Figure 4: Domestic tourism expenditure: Annual growth rate at current prices, 2015–2019 (%).....	27
Figure 5: Internal tourism expenditure: Annual growth rate at current prices, 2015–2019 (%).....	29
Figure 6: Link between gross direct value added of the tourism industries and tourism direct gross value added.....	41
Figure 7: Tourism direct gross value added, 2015–2019 (% contribution).....	43

Abbreviations

AFS	Annual Financial Statistics
BoP	Balance of Payments
CAPI	Computer-Assisted Personal Interviews
CPC	Central Product Classification
DTS	Domestic Tourism Survey
GDP	Gross Domestic Product
GDVATI	Gross Direct Value Added of the Tourism Industries
GVA	Gross Value Added
IES	Income and Expenditure Survey
IRTS	International Recommendations for Tourism Statistics
ISIC	International Standard Industrial Classification of All Economic Activities
LCS	Living Conditions Survey
LSM	Living Standards Measure
LSS	Large Sample Survey
PAPI	Paper-Assisted Personal Interviews
QLFS	Quarterly Labour Force Survey
SARB	South African Reserve Bank
SAT	South African Tourism
SICTA	Standard International Classification of Tourism Activities
SNA 2008	System of National Accounts 2008
Stats SA	Statistics South Africa
STS	System of Tourism Statistics
SUT	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

Key findings

Key findings of the Tourism Satellite Account for South Africa for 2015 to 2019*

	2015(f)	2016(f)	2017(f)	2018(p)	2019(p)
Inbound tourism expenditure (R million)	108 760	121 400	120 979	120 037	121 512
Annual growth in inbound tourism expenditure (%)	1,9	11,6	-0,3	-0,8	1,2
Outbound tourism expenditure (R million)	72 712	78 493	80 838	83 673	84 777
Annual growth in outbound tourism expenditure (%)	6,3	8,0	3,0	3,5	1,3
Tourism trade balance with the rest of the world (R million)	36 048	42 907	40 141	36 364	36 735
Annual growth in the tourism trade balance with the rest of the world (%)	-5,9	19,0	-6,4	-9,4	1,0
Domestic tourism expenditure (R million)	168 468	183 019	163 685	192 959	329 962
Annual growth in domestic tourism expenditure (%)	-15,8	8,6	-10,6	17,9	71,0
Internal tourism expenditure (R million)	277 228	304 419	284 664	312 996	451 474
Annual growth in internal tourism expenditure (%)	-9,6	9,8	-6,5	10,0	44,2
Tourism direct gross value added (TDGVA) (R million)	117 476	129 344	121 680	134 338	196 705
Tourism direct gross value added (TDGVA) (% of GVA)	3,0	3,0	2,6	2,8	3,9
Tourism direct gross domestic product (TDGDP) (R million)	127 135	139 700	132 366	146 158	209 151
Tourism direct gross domestic product (TDGDP) (% of GDP)	2,9	2,9	2,6	2,7	3,7
Persons directly engaged in producing goods and services purchased by visitors (number)	635 544	630 509	575 910	611 737	773 533
Persons directly engaged in producing goods and services purchased by visitors (% of total)	4,0	4,0	3,6	3,7	4,7

(f) Final

(p) Preliminary

*Please note that the 2015 to 2019 Tourism Satellite Account (TSA) data were compiled using the new rebased and benchmarked national accounts data that were published by Statistics South Africa (Stats SA) in August 2021. TSA data for 2013 and 2014 have also been revised and are available electronically in Excel format on the Stats SA website (www.statssa.gov.za).

Tourism direct gross value added (TDGVA) increased from R134 338 million in 2018 to R196 705 million in 2019 (46,4% increase). Tourism direct gross domestic product (TDGDP) increased from R146 158 million in 2018 to R209 151 million in 2019 (43,1% increase).

The tourism sector directly employed 773 533 persons in 2019, an increase of 26,4% or 161 796 employees compared with 2018. The tourism share of total employment increased from 2018 (3,7%) to 2019 (4,7%).

The year 2019 saw 14 797 472 non-resident visitors to South Africa compared with 15 004 384 non-resident visitors in 2018 and 14 975 675 non-resident visitors in 2017. Of the 14 797 472 non-resident visitors in 2019, 4 568 879 (or 30,9%) were same-day visitors and 10 228 593 (or 69,1%) were tourists.

For tourism consumption (expenditure), the trends in 2019 (compared with 2018) were:

- Tourism exports (inbound tourism expenditure) increased by 1,2% to R121 512 million compared with a 0,8% decline in the previous period;
- Tourism imports (outbound tourism expenditure) increased by 1,3% to R84 777 million compared with 3,5% growth in the previous period;
- Domestic tourism expenditure increased by 71,0% to R329 962 million compared with a 17,9% increase in the previous period; and
- Internal tourism expenditure increased by 44,2% to R451 474 million compared with a 10,0% increase in the previous period.

Inbound tourism expenditure totalling R121 512 million was recorded in 2019. The main expenditure items were 'accommodation services for visitors' (17,3%), 'non-specific products' (16,6%), 'connected products' (16,1%) and 'road passenger transportation services' (12,6%). Domestic tourism expenditure totalling R329 962 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2019. The main expenditure items were 'non-specific products' (27,1%), 'road passenger transportation services' (14,3%), 'air passenger transportation services' (13,8%) and 'food- and beverage-serving services' (13,5%).

The total internal tourism consumption in cash for South Africa in 2019 was R451 474 million (inbound tourism consumption R121 512 million [26,9%] and domestic tourism consumption R329 962 million [73,1%]). The main expenditure items for internal tourism were 'non-specific products' (24,3%), 'road passenger transportation services' (13,8%), 'food- and beverage-serving services' (12,9%) and 'air passenger transportation services' (12,1%).

Revisions to time series and preliminary estimates for 2019

Stats SA compiles the Tourism Satellite Account (TSA) from a wide range of source material. Consequently the TSA is highly integrated with the surveys and related data sources on which it depends, including the national accounts. Previously the TSA time series ended in 2018, and 2019 has now been added. There are two issues to highlight regarding the latest TSA estimates.

First, there have been substantial revisions in the TSA source material since the last set of TSA time series was published in November 2019. These revisions have been carried through to the TSA. Second, there are large changes between 2018 and 2019 which should be treated with caution and must be seen in the context of methodological changes in the Statistics South Africa (Stats SA) Domestic Tourism Survey (DTS). The following notes provide detailed information on these two issues.

Benchmarked and rebased gross domestic product estimates

Because prices and economic structures change over time, the base year for the national accounts must be updated and the gross domestic product (GDP) estimates must be benchmarked using the latest available socio-economic surveys, some of which are only conducted at intervals of several years. Rebasing and

benchmarking, along with the introduction of new sources and methods, are essential activities for maintaining GDP as a reliable measure of economic performance. In August 2021 Stats SA published newly benchmarked real (or volume) GDP measured at constant 2015 prices (replacing the previous GDP measured at constant 2010 prices) as well as revised estimates of nominal GDP measured at current prices, since these were inevitably affected by new methods, data sources and benchmarking. The national accounts benchmarking process, undertaken by Stats SA in collaboration with the South African Reserve Bank (SARB), provides an integrated, coherent set of economic statistics to inform users about the dynamics of the South African economy.

Figure A and Table A show the previous and revised growth rates in real GDP between 2011 and 2020. The growth rates are similar in magnitude and in pattern, with the largest difference occurring in 2018. The growth rate was positive in all years during 2011–2019, averaging 1,6% per annum on the revised series and 1,5% on the previous series.

Figure A – Real GDP growth rate

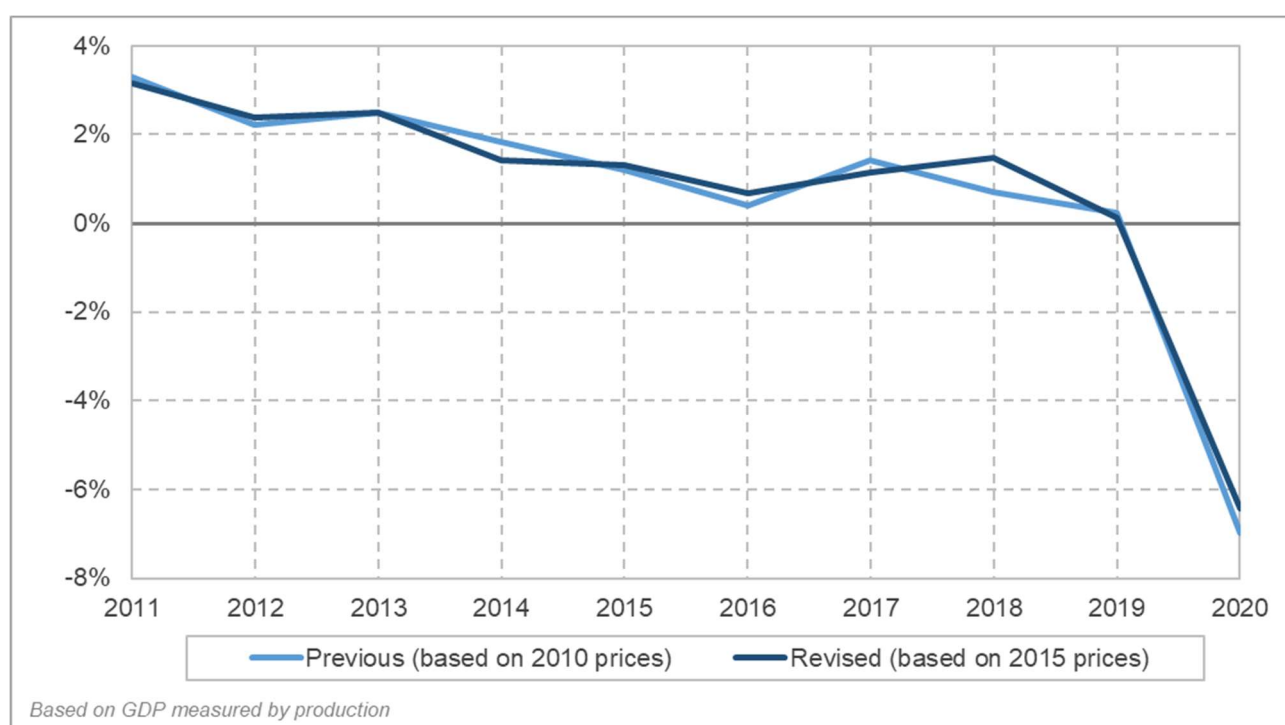


Table A – Comparison of previous and revised GDP estimates

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Real GDP growth rate (% per year)										
Previous (2010 prices)	3,3	2,2	2,5	1,8	1,2	0,4	1,4	0,8	0,2	-7,0
Revised (2015 prices)	3,2	2,4	2,5	1,4	1,3	0,7	1,2	1,5	0,1	-6,4
Difference (% points)	-0,1	0,2	0,0	-0,4	0,1	0,3	-0,2	0,7	-0,1	0,6
Level of GDP at current prices (R billion)										
Previous	3 024	3 254	3 540	3 805	4 050	4 359	4 654	4 874	5 078	4 973
Revised	3 327	3 566	3 869	4 134	4 421	4 760	5 078	5 358	5 605	5 521
Difference	303	313	329	329	371	400	425	484	527	548
Difference (%)	10,0	9,6	9,3	8,6	9,2	9,2	9,1	9,9	10,4	11,0

Historically, benchmarking GDP has resulted in estimates that show an increase in the size of the economy. Over the last two decades, and using the new base year in each case as a measure, these increases have ranged between 1,8% (2005 new base year, published in 2009) and 13,5% (1995 new base year, published in 1999). In the latest benchmark cycle the size of the economy is 9,2% larger in the new base year of 2015, as measured by GDP at current prices (based on the production approach, which is the official measure of GDP). In the 10 years between 2011 and 2020, the percentage difference between the previous and revised levels averaged 9,6%, and ranged between 8,6% in 2014 and 11,0% in 2020 (Table A and Figure B) (all based on current prices).

Figure B – Level of GDP at current prices

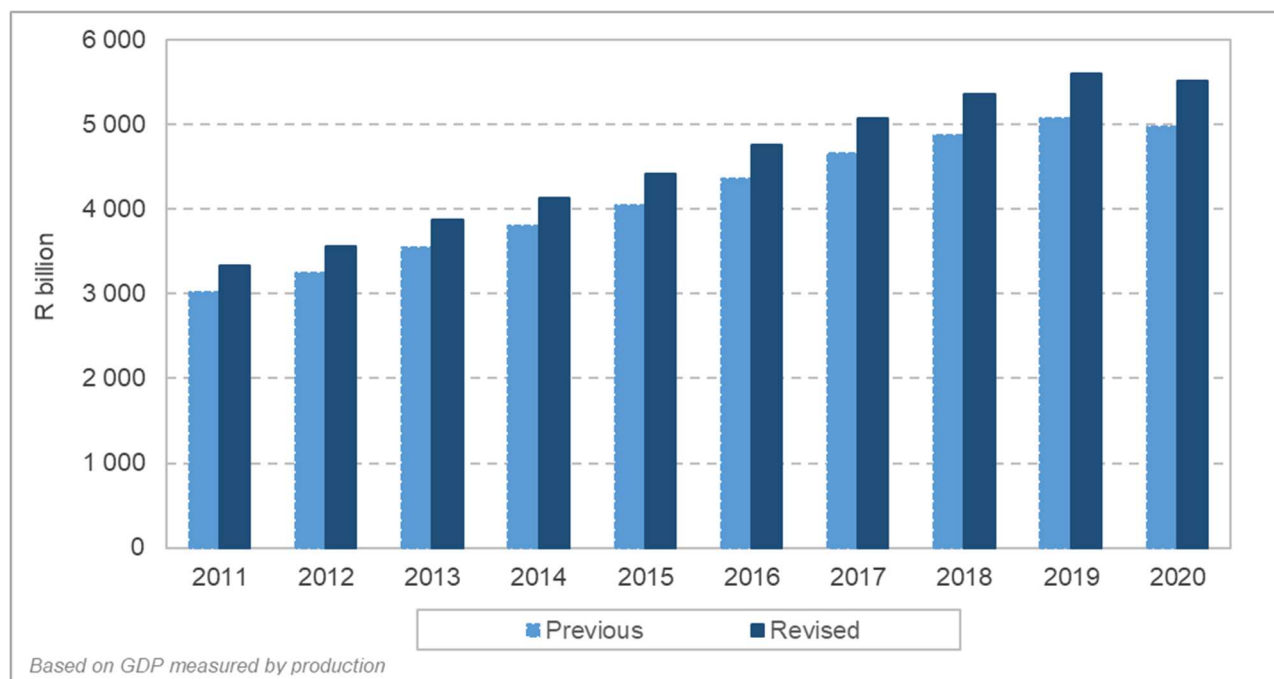


Figure C provides a comparison between the previous and revised levels of value added in the new 2015 base year. The largest changes occurred in finance, real estate and business services (26,0% higher); general

government services (45,0% lower); and personal services (206,0% higher). Further information on the changes in value added is provided in Annexure A of National Accounts: Sources and Methods, Report No. 04-04-04 (August 2021), available on the Stats SA website:

http://www.statssa.gov.za/?page_id=1854&PPN=Report 04-04-04&SCH=72991.

Figure C – Components of value added in 2015 base year

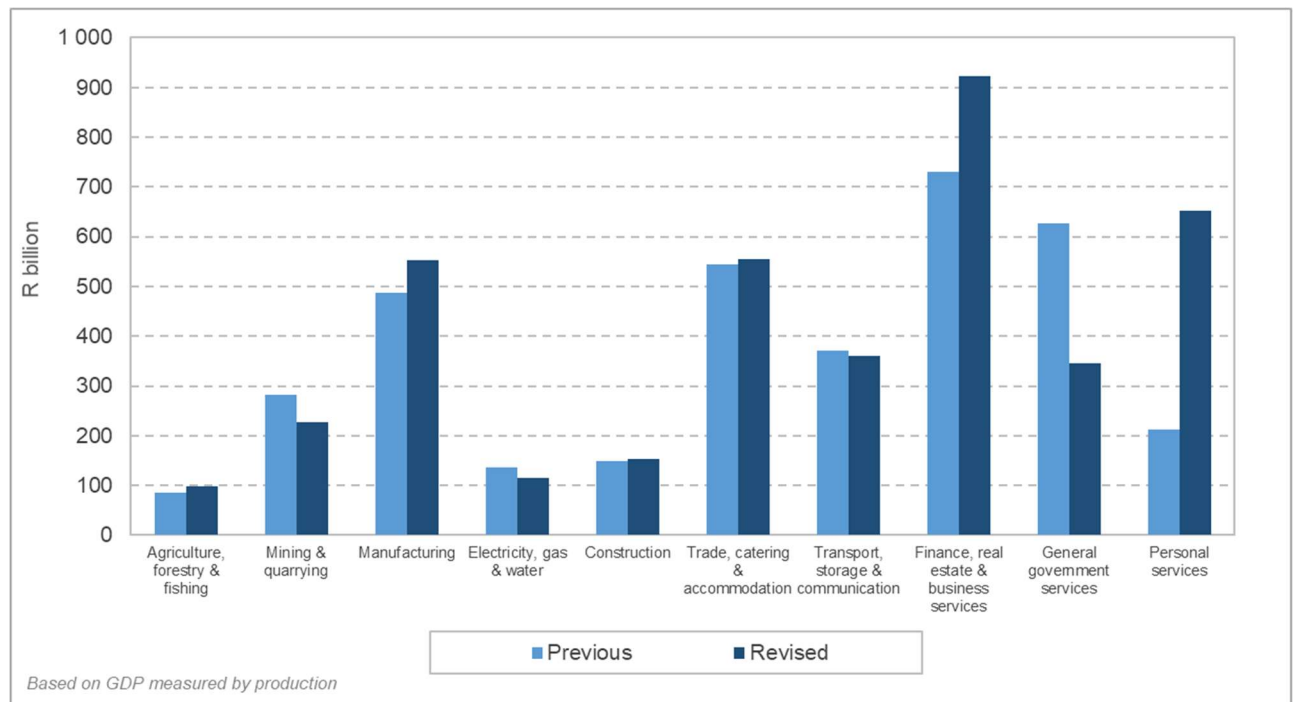
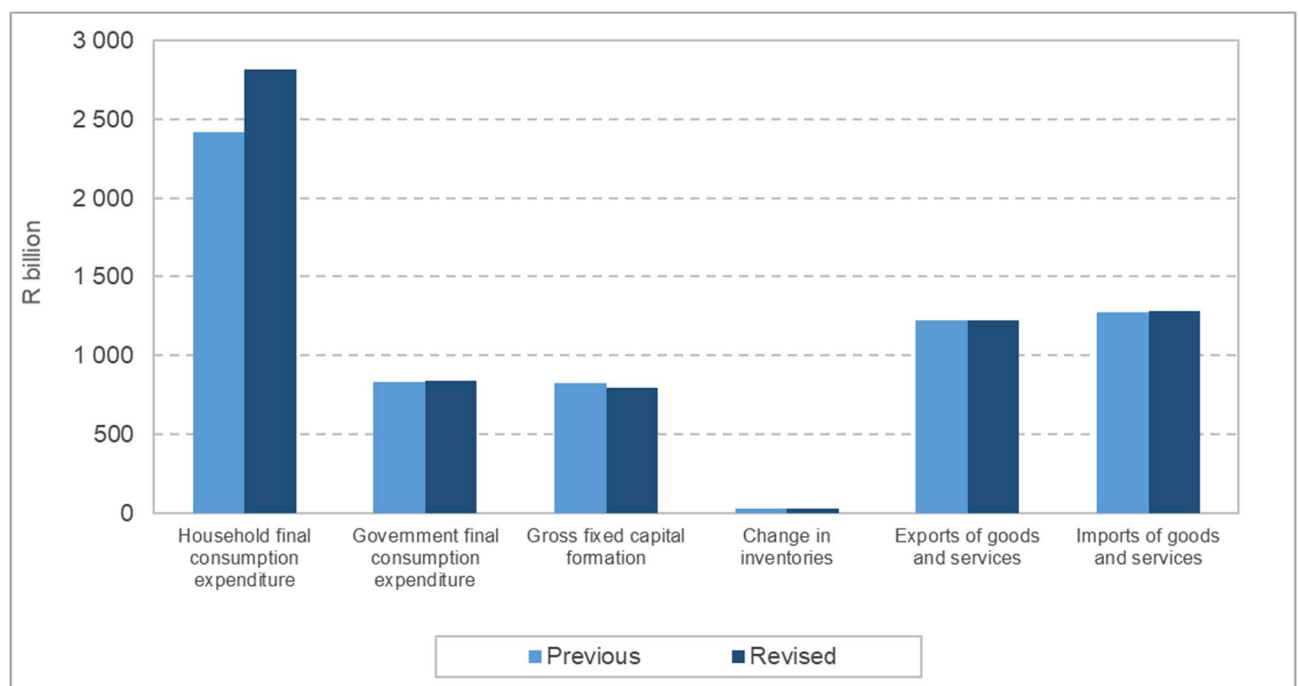


Figure D – Components of expenditure on GDP in 2015 base year



On the expenditure side of the economy, the main difference between the previous and revised GDP levels in 2015 is in household final consumption expenditure (Figure D). The revised value for household consumption is 16,0% higher. The three categories of household expenditure contributing the most to this increase are recreation and culture; restaurants and hotels; and miscellaneous goods and services. There was a decrease in one category, namely food and non-alcoholic beverages. Further information on changes in household final consumption expenditure (and other components of expenditure) is provided in Annexure B of National Accounts: Sources and Methods, Report No. 04-04-04 (August 2021), available on the Stats SA website: [http://www.statssa.gov.za/?page_id=1854&PPN=Report 04-04-04&SCH=72991](http://www.statssa.gov.za/?page_id=1854&PPN=Report%2004-04-04&SCH=72991).

The newly benchmarked and rebased time series for GDP also included the compilation and publication of new supply and use tables (SUTs) time series for 2013 to 2018. There was a need to change and update the existing SUT framework to fully integrate the GDP expenditure side, which in previous benchmarking and rebasing exercises was compiled by the SARB. The decision was taken to develop a new SUT framework as part of this benchmark process. This was undertaken in order to include all the new changes that had to be implemented to achieve Stats SA's first SUT series, with Stats SA compiling all three GDP approaches (production approach, income approach and expenditure approach). The SUTs are intended to include all transactions taking place in goods and services in an economy during a specific year in a matrix format. The SUTs, often regarded as the cornerstone of the 2008 System of National Accounts (SNA 2008), have both statistical and analytical functions. They form the central framework for the compilation of a single and coherent estimate of GDP; they integrate all the components of the production, income and expenditure approaches to GDP; and they provide key links to other parts of the SNA 2008 framework.

The SUT framework not only constrains the current-value estimates of supply and use to balance exactly, but also provides a way to ensure that the corresponding volume estimates – expressed in the prices of another year – are in balance, and that the series of prices implied by the existence of one table in current prices and one in volume terms are strictly consistent. In general, the best way to ensure mutual consistency is to prepare the SUTs in current values and in volume terms at the same time. Stats SA's SUTs are fully balanced in current prices only.

One of the many other uses of the SUTs is that they can be extended to satellite accounts (accounts linking SNA 2008 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 which surface only in a limited number of points, e.g. tourism. Satellite accounts are linked to, but distinct from, the central system.

2019 domestic tourism surveys

Domestic tourism demand is measured by two surveys in South Africa, namely the South African Tourism (SAT) DTS and the Stats SA DTS. Although these are both household surveys there are important differences between them, e.g. SAT excludes persons younger than 18 – for further details see Table 1 of Stats SA's 2019 DTS (Statistical release P0352.1), available on the Stats SA website: http://www.statssa.gov.za/?page_id=1854&PPN=P0352.1&SCH=72765.

The sample size for the SAT DTS is 15 594 persons (about 1 300 monthly), and for the Stats SA DTS it is approximately 28 000 households divided into four quarters using a continuous data collection (CDC) method. The SAT and Stats SA DTSs show steep increases in domestic trips and domestic tourism expenditure between 2018 and 2019 compared with the rest of the time series from 2013 to 2018. Table B shows the

annual number of trips and total annual spend as well as the annual growth rates from the SAT and Stats SA DTSs for the period 2013 to 2019.

Table B – Comparison of SAT and Stats SA domestic tourism surveys for annual number of domestic trips and annual total domestic spend, 2013 to 2019

	2013	2014	2015	2016	2017	2018	2019
Number of domestic trips (million)							
SAT DTS	25,2	28,0	24,5	24,3	17,2	17,6	28,5
SAT DTS annual growth (%)		11,1	-12,5	-0,8	-29,2	2,3	61,9
Stats SA DTS	105,1	95,3	89,7	82,2	91,9	87,1	152,0
Stats SA annual growth (%)		-9,4	-5,8	-8,4	11,8	-5,2	74,5
Total domestic spend (R billion)							
SAT DTS	24,3	26,8	23,6	26,5	22,1	26,4	43,9
SAT DTS annual growth (%)		10,3	-11,9	12,3	-16,6	19,4	66,3
Stats SA DTS	103,9	109,7	86,7	86,7	86,0	100,6	204,1
Stats SA DTS annual growth (%)		5,6	-21,0	-0,04	-0,8	16,9	103,0

The SAT DTS reported 28,5 million domestic trips in 2019, up by 61,9% from 17,6 million in 2018, but the 2019 level should be seen in the context of previous years as well (well above 20 million annually during 2013–2016). The SAT DTS reported domestic spending of R43,9 billion in 2019, or 66,3% higher than 2018 and substantially higher than all previous years. Note that domestic spending has an inflation component whereas the number of trips does not.

The Stats SA DTS reported 152 million domestic trips in 2019, which is much higher than previous years, e.g. 74,5% higher than 2018 and 65,4% higher than 2017. The Stats SA DTS level of domestic spending was also very high in 2019 compared with previous surveys, namely R204,1 billion, which is more than double the level seen in 2018.

Methodological changes in the Stats SA 2019 DTS: Increased number of trips and total annual spend

Previously the Stats SA DTS questionnaire was divided into two components. Prior to 2019, the paper-assisted personal interviews (PAPI) questionnaire could not cater for each household member to be interviewed and was divided into the following two sections. The first section asked about trips undertaken by the main respondent who travelled alone or with other household members. The second section of the questionnaire asked about trips undertaken by other household members without the main respondent. In contrast, in the 2019 Stats SA DTS, the main respondent and all members of the household who undertook trips were asked to provide information about their own trips.

For the Stats SA 2019 DTS, data collection was conducted using computer-assisted personal interviews (CAPI). All household members were asked about the trips that they had undertaken. Both the main respondent and all members of the household who undertook trips were asked to provide information about their own trips. The CAPI instrument is able to accommodate any number of household members found in a household, and CAPI expects each household member to be present at the time of the interview to answer for him/herself.

There were other changes as well regarding Stats SA's 2019 DTS. The questionnaire was reviewed and options for some questions were reduced or collapsed according to the manual International Recommendations for Tourism Statistics (IRTS, 2008) of the United Nations World Tourism Organization (UNWTO). Since the continuous data collection methodology was accompanied by significant structural changes in the questionnaire, new editing and imputation systems had to be developed. Some sections of the Stats SA 2019 DTS report are based on the analysis of the most recent trip undertaken by the respondent as in previous DTS reports, but instead of presenting only the data of the most recent trip in the report, the data were modelled based on the assumption that the information of the most recent trip is representative of all trips taken during a particular quarter. This assumption was made plausible by the fact that the seasonality bias present in previous surveys was reduced through continuous collection and a revolving three-month recall period.

It is difficult to gauge the full impact of these methodological changes on the results of the 2019 DTS. Improvements in methodology can come at the expense of comparability over time. As stated above, large changes in the TSA time series between 2018 and 2019 should be treated with caution, although it is equally important to note that there is evidence of large increases from the 2019 SAT DTS, as indicated in Table B and as outlined below. In the event of revisions to the 2019 DTSs (Stats SA and SAT), these will be carried through to the TSA estimates in future publications.

Increased number of trips and total annual spend in the SAT 2019 DTS

There were no methodological changes in the 2019 SAT DTS. SAT provided the following comments regarding the increases in domestic trips and spending:

- There were increased levels of domestic tourism in January, February, June and August to December in 2019 compared with 2018.
- Domestic travel increased across all purposes of travel, with notable increases in 'holiday' and 'travel for medical reasons' in 2019 compared with 2018.
- South Africans opted to travel domestically in 2019 instead of internationally; outbound trips decreased in the months that domestic trips increased during 2019.
- There was a shift in the profile of domestic tourists, with more tourists from living standards measure (LSM) 6, 8 and 9 in 2019 compared with 2018. These LSM increases were noted in the same months when domestic tourism increased compared with 2018.
- Domestic tourists may have found more affordable offers to encourage them to travel domestically during 2019. They also are increasingly seeing the benefits of travel as the mentions of 'lack of affordability' and 'no reason to travel' decreased in 2019 compared with 2018.

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. 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 annual Tourism Satellite Accounts (TSA) 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 outcome 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 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 SNA 2008. 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.

SNA 2008 recommends the development of satellite accounts for the measurement of economic phenomena that are not explicitly shown in the core set of accounts. The TSA was therefore developed for the explicit study of tourism-connected industries and products. A TSA¹ is:

- A statistical instrument used to measure the size of the 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.²

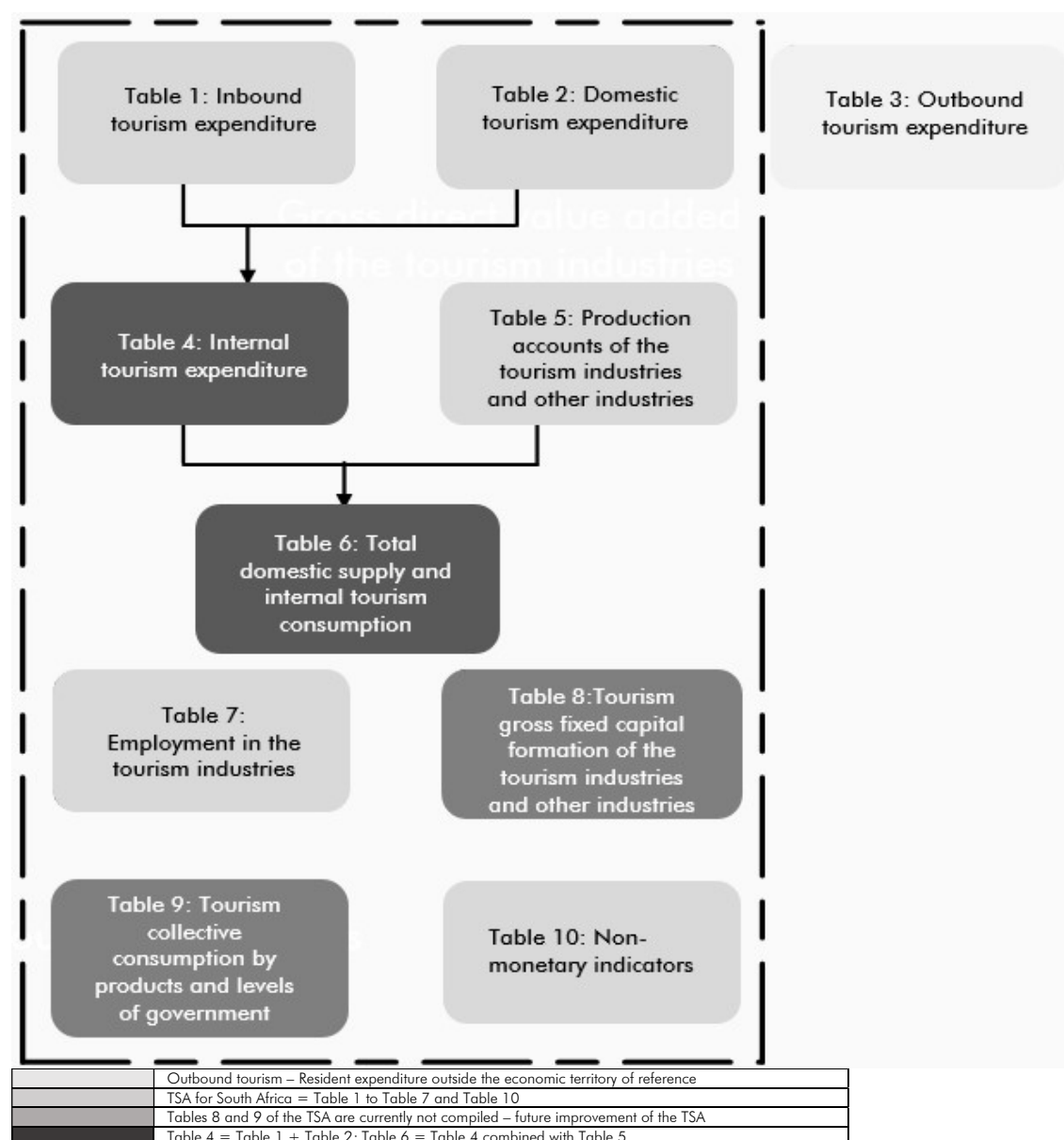
The fundamental structure of a TSA is based on the general relationship existing within an economy between the demand for goods and services generated by tourism on the one hand, and their supply on the other hand, and as such provides a framework for policy analysis of issues related to tourism economics, as well as for model-building, tourism growth analysis and productivity measurements. For South Africa, the TSA provides a measure of the importance of tourism in terms of GDP, expenditure and employment that is comparable with similar measures from SNA 2008 for the overall South African economy (it also allows a comparison with

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

² TSA: RMF

other industries in terms of the above-mentioned variables). The TSA for South Africa, final 2017 and provisional 2018 to 2019 provides a coherent framework from within which to integrate and analyse economic statistics related to tourism activity from both the supply and demand side. The South African TSA follows the international guidelines as prescribed by the UNWTO. Figure 1 shows the 10 tables of the TSA.

Figure 1: The 10 tables of a Tourism Satellite Account



A background to the concepts and methodology used in the compilation of the TSA for South Africa can be found in the discussion document 'Draft Tourism Satellite Account for South Africa, 2005 (Discussion document No. D0405.7)' on the Stats SA website (www.statssa.gov.za) as well as from the Reprographics section at Stats SA (millies@statssa.gov.za or 012 310 8619). TSA Tables 1 to 7 for 2013 to 2019, in Microsoft Excel spreadsheets, are released with the November 2021 report on the TSA for South Africa, downloadable from www.statssa.gov.za.

Chapter 2: Data sources

2.1 Data sources used for compilation of the Tourism Satellite Account

The SUTs of SNA 2008 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 SNA 2008, namely production should be valued at basic prices, and consumption and use at purchasers' prices.³

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 SARB and SAT.

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

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

Demand-side data				
Survey/administrative data	Conducted in the past?	Latest publication ⁴	Frequency	Coverage
Tourism and migration	Yes	October 2021 (reference period – August 2021)	Monthly and annually	Movement control system from Department of Home Affairs (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	October 2020 (reference period – 2019)	Annually	28 000 households
SU-tables	Yes	Reference period 2018 (124x108)	Annually	Entire economy

³ TSA: RMF

⁴ November 2021

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 2020 (reference period – 2019)	Annually	General government
Tourist Accommodation Survey	Yes	October 2021 (reference period – August 2021)	Monthly	1 012 enterprises sampled
Survey of food and beverages	Yes	October 2021 (reference period – August 2021)	Monthly	920 enterprises sampled
Large Sample Survey (LSS) on accommodation	Yes	September 2020 (reference period – 2018)	Every 5 years	1 000 enterprises sampled
LSS on personal services	Yes	September 2020 (reference period – 2018)	Every 5 years	3 000 enterprises sampled
LSS on transport and storage	Yes	September 2021 (reference period – 2019)	Every 5 years	3 000 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	September 2020 (reference period – 2018)	Every 5 years	Wholesale: 3 000 enterprises sampled Retail: 3 000 enterprises sampled
Annual Financial Statistics (AFS)	Yes	December 2020 (reference period – 2019)	Annually	12 867 enterprises sampled
SU-tables	Yes	Reference period 2018 (124x108)	Annually	Entire economy

Source: Statistics South Africa

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

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 ⁵⁶
Departure Survey	Monthly	2019	57 600 people
Domestic Survey	Monthly	2019	15 600 adults

Source: SAT

2.1.1 Supply and Use Tables

The SUTs are a cornerstone of SNA 2008. 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 SUTs is that they can be extended to satellite accounts (accounts linking SNA 2008 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 SNA 2008. 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. SNA 2008 recommends that intermediate and final consumption expenditure be valued at purchasers' prices, which 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.

⁵ Annual coverage

⁶ 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 2017 and provisional 2018 and 2019

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.⁷ 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.⁸ Tables 3a to 3c show tourism expenditure by product for South Africa, for the reference years 2017 to 2019.

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-specific⁹ 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.

⁷ TSA: RMF

⁸ TSA: RMF

⁹ A tourism-specific product is either a tourism-characteristic product or a tourism-related product.

Table 3a: 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
Characteristic products	140 895	81 728	222 624	572 578	38,9	
Accommodation services for visitors	20 434	20 099	40 533	43 660	92,8	
Food- and beverage- serving services	18 764	14 029	32 792	134 356	24,4	
Passenger transport services	75 881	26 621	102 502	238 282	43,0	
Railway passenger transportation services	269	211	480	6 906	7,0	
Road passenger transportation services	23 761	14 459	38 221	157 649	24,2	
Water passenger transportation services	2 201	479	2 680	3 357	79,8	
Air passenger transportation services	39 151	11 238	50 389	52 511	96,0	
Transport equipment rental services	10 498	233	10 732	17 858	60,1	
Travel agencies and other reservation services	14 327	6 021	20 348	20 763	98,0	
Cultural services	2 597	4 797	7 393	44 073	16,8	
Sports and recreational services	8 894	10 161	19 055	91 443	20,8	
Connected products	9 692	17 623	27 315	301 430	9,1	
Retail sales of food, beverages and tobacco	4 860	9 785	14 645	154 579	9,5	
Retail sales of textiles, clothing, footwear and leather goods	2 223	4 726	6 949	55 463	12,5	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	82	228	310	35 548	0,9	
Retail sales of household furniture, appliances, articles and equipment	317	1 451	1 768	32 543	5,4	
Retail sales of automotive fuel	2 210	1 433	3 644	23 296	15,6	
Non-specific products	13 097	21 627	34 724	9 046 708	0,04	
Total	163 685	120 979	284 664	9 920 716	2,9	80 838

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

Table 3b: 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
Characteristic products	162 393	80 781	243 174	603 760	40,3	
Accommodation services for visitors	25 460	19 918	45 378	47 456	95,6	
Food- and beverage- serving services	23 108	13 325	36 433	143 429	25,4	
Passenger transport services	84 993	25 796	110 788	248 562	44,6	
Railway passenger transportation services	282	237	519	7 447	7,0	
Road passenger transportation services	28 600	14 836	43 435	164 005	26,5	
Water passenger transportation services	1 946	406	2 352	2 917	80,6	
Air passenger transportation services	43 419	10 079	53 498	55 707	96,0	
Transport equipment rental services	10 745	238	10 984	18 486	59,4	
Travel agencies and other reservation services	15 251	6 410	21 661	22 103	98,0	
Cultural services	3 090	4 851	7 942	44 998	17,6	
Sports and recreational services	10 491	10 481	20 972	97 213	21,6	
Connected products	13 319	17 927	31 246	322 820	9,7	
Retail sales of food, beverages and tobacco	7 443	9 440	16 883	165 440	10,2	
Retail sales of textiles, clothing, footwear and leather goods	2 616	4 984	7 599	57 828	13,1	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	90	275	365	39 646	0,9	
Retail sales of household furniture, appliances, articles and equipment	511	1 661	2 172	35 725	6,1	
Retail sales of automotive fuel	2 660	1 567	4 227	24 180	17,5	
Non-specific products	17 247	21 329	38 576	9 593 736	0,4	
Total	192 959	120 037	312 996	10 520 316	3,0	83 673

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

Table 3c: Tourism expenditure by product, 2019

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
Characteristic products	217 938	81 678	299 616	626 088	47,9	
Accommodation services for visitors	26 456	21 011	47 467	49 458	96,0	
Food- and beverage- serving services	44 508	13 778	58 286	150 712	38,7	
Passenger transport services	108 271	25 372	133 643	255 244	52,4	
Railway passenger transportation services	475	216	691	7 629	9,1	
Road passenger transportation services	47 084	15 269	62 352	168 020	37,1	
Water passenger transportation services	1 977	422	2 400	2 988	80,3	
Air passenger transportation services	45 586	9 220	54 806	57 071	96,0	
Transport equipment rental services	13 148	246	13 394	19 535	68,6	
Travel agencies and other reservation services	15 624	6 567	22 191	22 644	98,0	
Cultural services	5 558	4 266	9 824	46 821	21,0	
Sports and recreational services	17 521	10 683	28 204	101 209	27,9	
Connected products	22 732	19 620	42 352	339 213	12,5	
Retail sales of food, beverages and tobacco	15 065	10 823	25 888	173 842	14,9	
Retail sales of textiles, clothing, footwear and leather goods	3 052	5 186	8 238	60 765	13,6	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	227	287	513	41 660	1,2	
Retail sales of household furniture, appliances, articles and equipment	696	1 678	2 374	37 539	6,3	
Retail sales of automotive fuel	3 692	1 646	5 338	25 408	21,0	
Non-specific products	89 292	20 215	109 506	9 992 182	1,1	
Total	329 962	121 512	451 474	10 957 483	4,1	84 777

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.

SNA 2008 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.

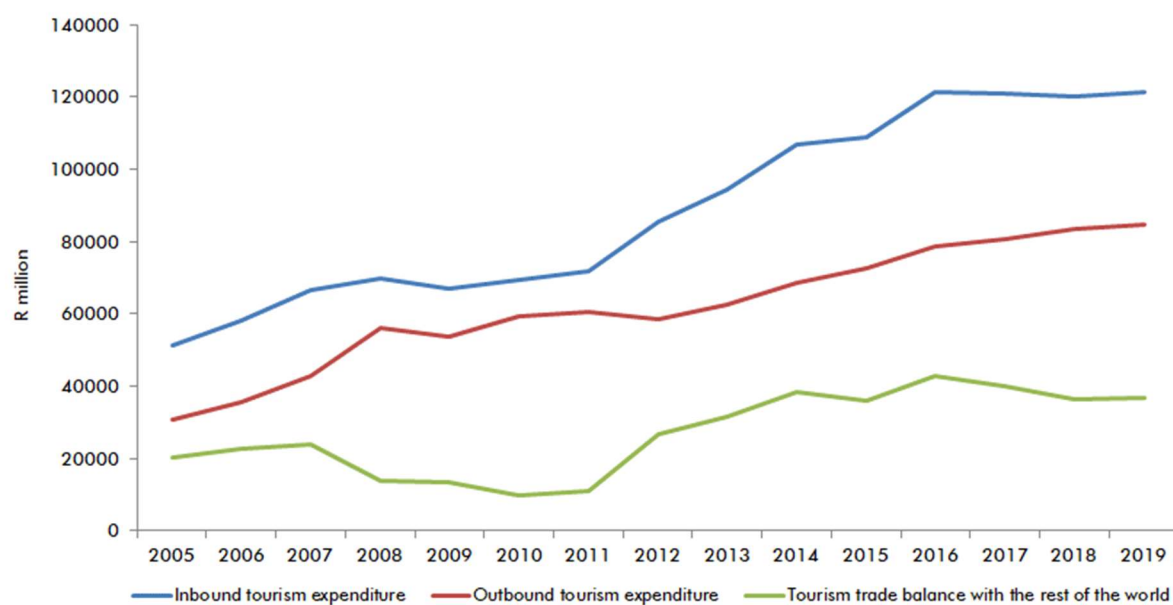
Table 4 and Figure 2 show the Tourism BoP for South Africa for the reference years 2005 to 2019.

Table 4: The Tourism Balance of Payments for South Africa, 2005–2019

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
2019	121 512	84 777	36 735

Source: South African Reserve Bank

Figure 2: The Tourism Balance of Payments for South Africa, 2005–2019 (R million)



Source: Statistics South Africa

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 2015 to 2019. Figure 3 shows the annual inbound tourism expenditure growth rates for the previous TSA time-series 2015 to 2018 and the new TSA time-series from 2015 to 2019.

Inbound tourism expenditure totalling R108 760 million was recorded in 2015. The main expenditure items were 'non-specific products' (22,8%), 'tourism-connected products' (15,1%), 'accommodation services for visitors' (15,1%) and 'road passenger transportation services' (13,0%). Inbound tourism expenditure totalling R121 512 million was recorded in 2019. The main expenditure items were 'accommodation services for visitors' (17,3%), 'non-specific products' (16,6%), 'connected products' (16,1%) and 'road passenger transportation services' (12,6%).

The year 2019 saw 14 797 472 non-resident visitors to South Africa compared with 15 004 384 non-resident visitors in 2018 and 14 975 675 non-resident visitors in 2017. Of the 14 797 472 non-resident visitors in 2019, 4 568 879 (or 30,9%) were same-day visitors and 10 228 593 (or 69,1%) were tourists.

Table 5: Inbound tourism expenditure by type of product, 2015–2019 (R million)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	16 462	16 405	20 099	19 918	21 011
Food- and beverage-serving services	9 910	13 482	14 029	13 325	13 778
Railway passenger transportation services	177	170	211	237	216
Road passenger transportation services	14 119	14 310	14 459	14 836	15 269
Water passenger transportation services	398	462	479	406	422
Air passenger transportation services	10 660	12 415	11 238	10 079	9 220
Transport equipment rental services	255	246	233	238	246
Travel agencies and other reservation services	4 691	5 547	6 021	6 410	6 567
Cultural services	3 101	3 845	4 797	4 851	4 266
Sports and recreational services	7 800	9 552	10 161	10 481	10 683
Tourism-connected products	16 440	16 905	17 263	17 927	19 620
Non-specific products	24 746	28 060	21 627	21 329	20 215
Total	108 760	121 400	120 979	120 037	121 512

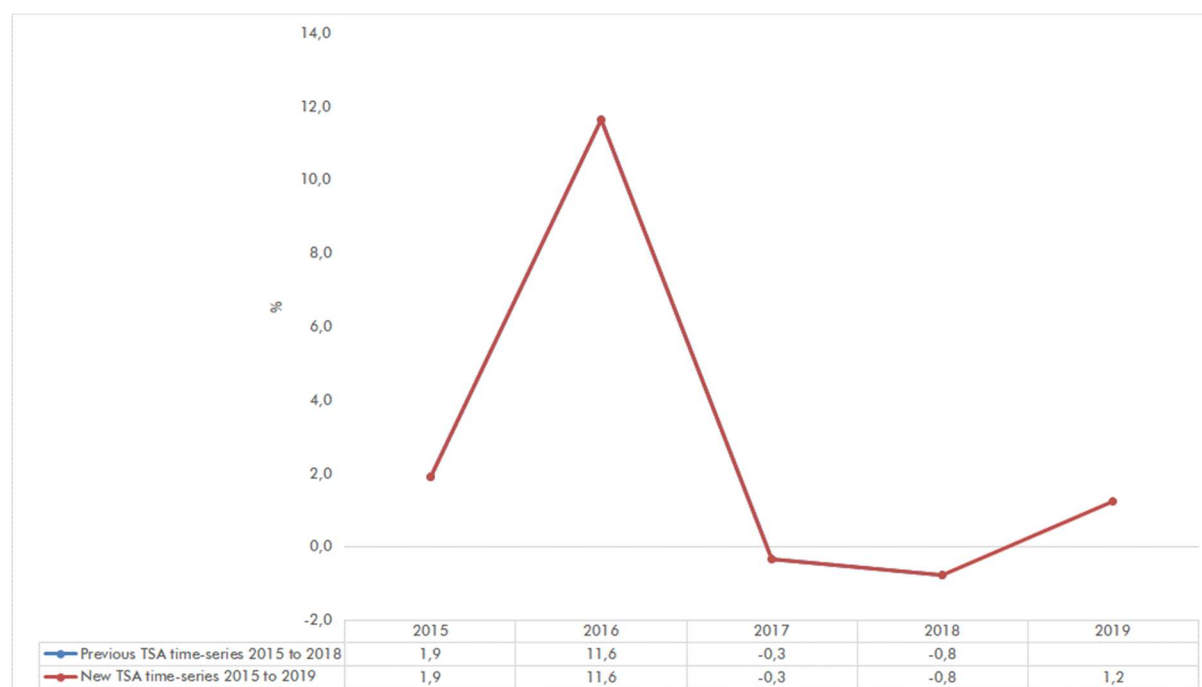
Individual figures may not add up to stated totals due to rounding.

Table 6: Inbound tourism expenditure by type of product, 2015–2019 (%)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	15,1	13,5	16,6	16,6	17,3
Food- and beverage-serving services	9,1	11,1	11,6	11,1	11,3
Railway passenger transportation services	0,2	0,1	0,2	0,2	0,2
Road passenger transportation services	13,0	11,8	12,0	12,4	12,6
Water passenger transportation services	0,4	0,4	0,4	0,3	0,3
Air passenger transportation services	9,8	10,2	9,3	8,4	7,6
Transport equipment rental services	0,2	0,2	0,2	0,2	0,2
Travel agencies and other reservation services	4,3	4,6	5,0	5,3	5,4
Cultural services	2,9	3,2	4,0	4,0	3,5
Sports and recreational services	7,2	7,9	8,4	8,7	8,8
Tourism-connected products	15,1	13,9	14,6	14,9	16,1
Non-specific products	22,8	23,1	17,9	17,8	16,6
Total	100,0	100,0	100,0	100,0	100,0

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

Figure 3: Inbound tourism expenditure: Annual growth rate at current prices, 2015–2019 (%)



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 2015 to 2019. Figure 4 shows the annual domestic tourism expenditure growth rates for the previous TSA time-series 2015 to 2018 and the new TSA time-series from 2015 to 2019.

Domestic tourism expenditure totalling R168 468 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2015. The main expenditure items were 'air passenger transportation services' (20,4%), 'road passenger transportation services' (17,1%), 'food- and beverage-serving services' (14,3%) and 'accommodation services for visitors' (11,8%).

Domestic tourism expenditure totalling R329 962 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2019. The main expenditure items were 'non-specific products' (27,1%), 'road passenger transportation services' (14,3%), 'air passenger transportation services' (13,8%) and 'food- and beverage-serving services' (13,5%).

Table 7: Domestic tourism expenditure by type of product, 2015–2019 (R million)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	19 905	22 860	20 434	25 460	26 456
Food- and beverage-serving services	24 130	25 038	18 764	23 108	44 508
Railway passenger transportation services	248	278	269	282	475
Road passenger transportation services	28 773	28 621	23 761	28 600	47 084
Water passenger transportation services	1 720	1 921	2 201	1 946	1 977
Air passenger transportation services	34 289	35 116	39 151	43 419	45 586
Transport equipment rental services	9 028	10 174	10 498	10 745	13 148
Travel agencies and other reservation services	11 161	13 198	14 327	15 251	15 624
Cultural services	4 279	4 327	2 597	3 090	5 558
Sports and recreational services	11 882	12 573	8 894	10 491	17 521
Tourism-connected products	8 498	11 069	9 692	13 319	22 732
Non-specific products	14 555	17 844	13 097	17 247	89 292
Total	168 468	183 019	163 685	192 959	329 962

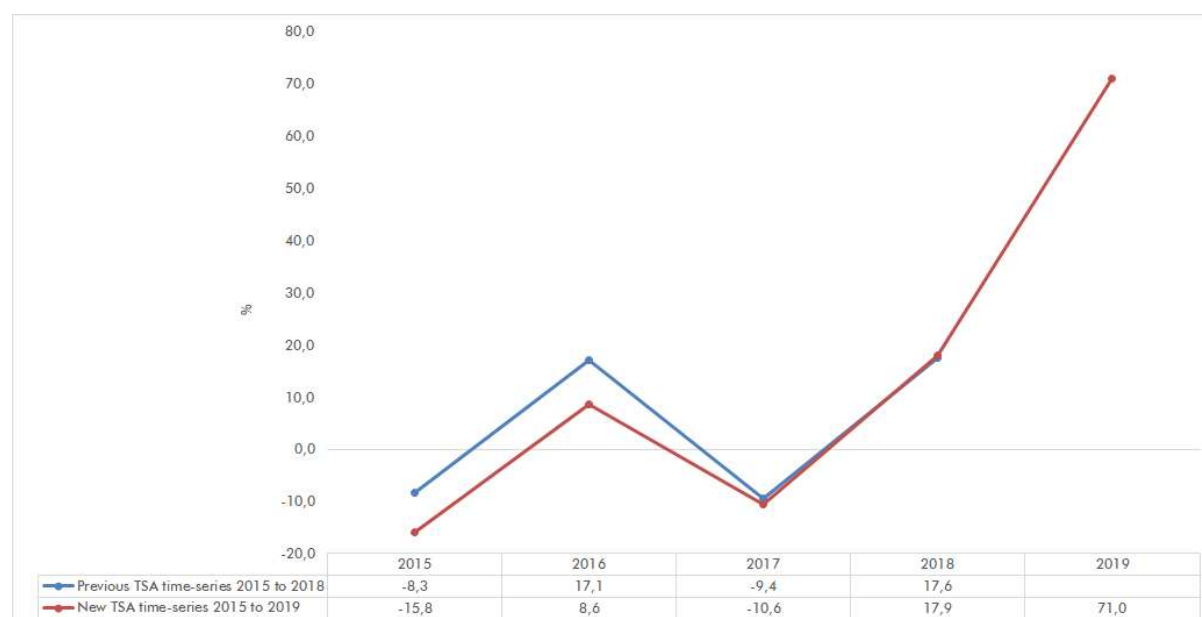
Individual figures may not add up to stated totals due to rounding.

Table 8: Domestic tourism expenditure by type of product, 2015–2019 (%)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	11,8	12,5	12,5	13,2	8,0
Food- and beverage-serving services	14,3	13,7	11,5	12,0	13,5
Railway passenger transportation services	0,1	0,2	0,2	0,1	0,1
Road passenger transportation services	17,1	15,6	14,5	14,8	14,3
Water passenger transportation services	1,0	1,0	1,3	1,0	0,6
Air passenger transportation services	20,4	19,2	23,9	22,5	13,8
Transport equipment rental services	5,4	5,6	6,4	5,6	4,0
Travel agencies and other reservation services	6,6	7,2	8,8	7,9	4,7
Cultural services	2,5	2,4	1,6	1,6	1,7
Sports and recreational services	7,1	6,9	5,4	5,4	5,3
Tourism-connected products	5,0	6,0	5,9	6,9	6,9
Non-specific products	8,6	9,7	8,0	8,9	27,1
Total	100,0	100,0	100,0	100,0	100,0

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

Figure 4: Domestic tourism expenditure: Annual growth rate at current prices, 2015–2019 (%)



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 2015 to 2019. Figure 5 shows the annual internal tourism expenditure growth rates for the previous TSA time-series 2015 to 2018 and the new TSA time-series from 2015 to 2019.

The total internal tourism consumption in cash for South Africa in 2015 was R277 228 million (inbound tourism consumption R108 760 million [39,2%] and domestic tourism consumption R168 468 million [60,8%]). The main expenditure items for internal tourism were 'air passenger transportation services' (16,2%), 'road passenger transportation services' (15,5%), 'non-specific products' (14,2%) and 'accommodation services for visitors' (13,1%).

The total internal tourism consumption in cash for South Africa in 2019 was R451 474 million (inbound tourism consumption R121 512 million [26,9%] and domestic tourism consumption R329 962 million [73,1%]). The main expenditure items for internal tourism were 'non-specific products' (24,3%), 'road passenger transportation services' (13,8%), 'food- and beverage-serving services' (12,9%) and 'air passenger transportation services' (12,1%).

Table 9: Internal tourism expenditure by type of product, 2015–2019 (R million)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	36 367	39 265	40 533	45 378	47 467
Food- and beverage-serving services	34 040	38 520	32 792	36 433	58 286
Railway passenger transportation services	425	448	480	519	691
Road passenger transportation services	42 892	42 931	38 221	43 435	62 352
Water passenger transportation services	2 118	2 384	2 680	2 352	2 400
Air passenger transportation services	44 949	47 531	50 389	53 498	54 806
Transport equipment rental services	9 283	10 420	10 732	10 984	13 394
Travel agencies and other reservation services	15 852	18 745	20 348	21 661	22 191
Cultural services	7 380	8 173	7 393	7 942	9 824
Sports and recreational services	19 683	22 124	19 055	20 972	28 204
Tourism-connected products	24 938	27 974	27 315	31 246	42 352
Non-specific products	39 301	45 904	34 724	38 576	109 506
Total	277 228	304 419	284 664	312 996	451 474

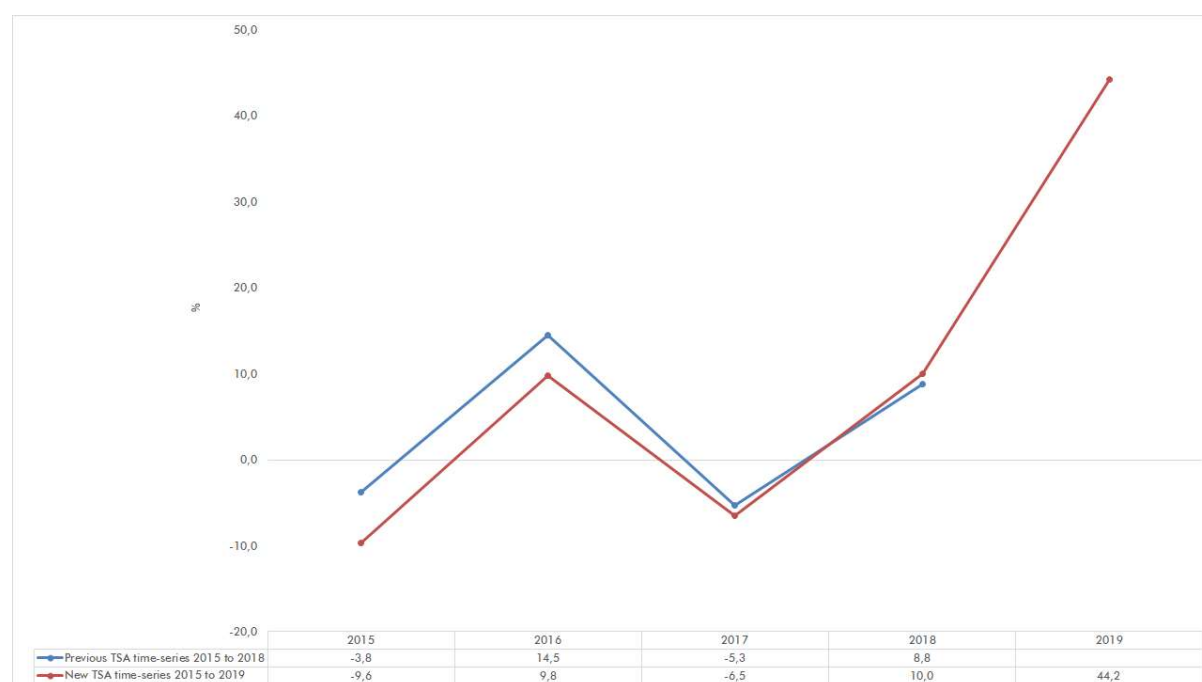
Individual figures may not add up to stated totals due to rounding.

Table 10: Internal tourism expenditure by type of product, 2015–2019 (%)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	13,1	12,9	14,2	14,5	10,5
Food- and beverage-serving services	12,3	12,7	11,5	11,6	12,9
Railway passenger transportation services	0,2	0,1	0,2	0,2	0,2
Road passenger transportation services	15,5	14,1	13,4	13,9	13,8
Water passenger transportation services	0,8	0,8	0,9	0,8	0,5
Air passenger transportation services	16,2	15,6	17,7	17,1	12,1
Transport equipment rental services	3,3	3,4	3,8	3,5	3,0
Travel agencies and other reservation services	5,7	6,2	7,1	6,9	4,9
Cultural services	2,7	2,7	2,6	2,5	2,2
Sports and recreational services	7,1	7,3	6,7	6,7	6,2
Tourism-connected products	9,0	9,2	9,6	10,0	9,4
Non-specific products	14,2	15,1	12,2	12,3	24,3
Total	100,0	100,0	100,0	100,0	100,0

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

Figure 5: Internal tourism expenditure: Annual growth rate at current prices, 2015–2019 (%)



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 SNA 2008, but the perspective is different from that of the SNA 2008 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.¹⁰ 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.¹¹

Tables 11a to 11c show the production accounts for the tourism industries and other industries for the reference years 2017 to 2019. 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 R255 362 million (or 5,6% of total GVA generated) in 2017, R270 644 million (or 5,6% of total GVA generated) in 2018 and R282 666 million (or 5,6% of total GVA generated) in 2019.

¹⁰ TSA: RMF

¹¹ 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), 2017
(R million)

Product	Tourism- characteristic industries	Tourism- connected industries	Other non- tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	376 975	138 228	358 804	874 008
A.1 Characteristic products	376 975		195 602	572 578
1. Accommodation services for visitors	31 421		12 239	43 660
1.1 Hotel and other accommodation for visitors other than 1.2	31 421		12 239	43 660
1.2 Accommodation services associated with all types of vacation home ownership				
2. Food- and beverage-serving services	78 217		56 139	134 356
3. Passenger transportation services	141 801		96 482	238 282
3.1 Railway passenger transportation services	6 906			6 906
3.2 Road passenger transportation services	61 168		96 482	157 649
3.3 Water passenger transportation services	3 357			3 357
3.4 Air passenger transportation services	52 511			52 511
3.5 Transport equipment rental services	17 858			17 858
4. Travel agencies and other reservation services	20 763			20 763
5. Cultural services	28 269		15 804	44 073
6. Sports and recreational services	76 504		14 938	91 443
A.2 Connected products		138 228	163 202	301 430
Retail sales of food, beverages and tobacco		71 707	82 872	154 579
Retail sales of textiles, clothing, footwear and leather products		13 866	41 597	55 463
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		18 069	17 479	35 548
Retail sales of household furniture, appliances, articles and equipment		14 495	18 048	32 543
Retail sales of automotive fuel		20 091	3 205	23 296
B. Non-specific products	10 094	27 434	9 009 181	9 046 708
Total output (at basic prices)	387 069	165 662	9 367 985	9 920 716
Total intermediate consumption (at purchasers' prices)	227 824	69 545	5 030 897	5 328 266
Total gross value added (at basic prices)	159 245	96 116	4 337 088	4 592 450
Compensation of employees	85 386	63 332	2 351 404	2 500 121
Taxes less subsidies on production	4 893	1 450	80 509	86 852
Gross operating surplus	68 968	31 335	1 905 174	2 005 477

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), 2018 (R million)

Product	Tourism-characteristic industries	Tourism-connected industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	399 784	151 272	375 524	926 580
A.1 Characteristic products	399 784		203 976	603 760
1. Accommodation services for visitors	34 258		13 198	47 456
1.1 Hotel and other accommodation for visitors other than 1.2				
1.2 Accommodation services associated with all types of vacation home ownership	34 258		13 198	47 456
2. Food- and beverage-serving services	84 772		58 657	143 429
3. Passenger transportation services	148 872		99 690	248 562
3.1 Railway passenger transportation services	7 447			7 447
3.2 Road passenger transportation services	64 315		99 690	164 005
3.3 Water passenger transportation services	2 917			2 917
3.4 Air passenger transportation services	55 707			55 707
3.5 Transport equipment rental services	18 486			18 486
4. Travel agencies and other reservation services	22 103			22 103
5. Cultural services	28 548		16 450	44 998
6. Sports and recreational services	81 233		15 980	97 213
A.2 Connected products		151 272	171 548	322 820
Retail sales of food, beverages and tobacco		77 208	88 232	165 440
Retail sales of textiles, clothing, footwear and leather products		14 457	43 371	57 828
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		21 086	18 560	39 646
Retail sales of household furniture, appliances, articles and equipment		16 561	19 164	35 725
Retail sales of automotive fuel		21 959	2 221	24 180
B. Non-specific products	10 305	26 251	9 557 179	9 593 736
Total output (at basic prices)	410 089	177 523	9 932 704	10 520 316
Total intermediate consumption (at purchasers' prices)	242 404	74 564	5 382 982	5 699 951
Total gross value added (at basic prices)	167 685	102 959	4 549 721	4 820 365
Compensation of employees	88 292	63 076	2 467 054	2 618 422
Taxes less subsidies on production	6 468	1 682	94 043	102 192
Gross operating surplus	72 926	38 201	1 988 624	2 099 751

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), 2019 (R million)

Product	Tourism-characteristic industries	Tourism-connected industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	415 957	158 954	390 390	965 301
A.1 Characteristic products	415 957		210 131	626 088
1. Accommodation services for visitors	35 994		13 464	49 458
1.1 Hotel and other accommodation for visitors other than 1.2	35 994		13 464	49 458
1.2 Accommodation services associated with all types of vacation home ownership				
2. Food- and beverage-serving services	89 076		61 636	150 712
3. Passenger transportation services	153 113		102 131	255 244
3.1 Railway passenger transportation services	7 629			7 629
3.2 Road passenger transportation services	65 889		102 131	168 020
3.3 Water passenger transportation services	2 988			2 988
3.4 Air passenger transportation services	57 071			57 071
3.5 Transport equipment rental services	19 535			19 535
4. Travel agencies and other reservation services	22 644			22 644
5. Cultural services	29 926		16 895	46 821
6. Sports and recreational services	85 204		16 005	101 209
A.2 Connected products		158 954	180 259	339 213
Retail sales of food, beverages and tobacco		81 129	92 712	173 842
Retail sales of textiles, clothing, footwear and leather products		15 191	45 574	60 765
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		22 157	19 503	41 660
Retail sales of household furniture, appliances, articles and equipment		17 402	20 137	37 539
Retail sales of automotive fuel		23 074	2 334	25 408
B. Non-specific products	10 646	27 584	9 953 951	9 992 182
Total output (at basic prices)	426 604	186 538	10 344 341	10 957 483
Total intermediate consumption (at purchasers' prices)	252 125	78 350	5 587 720	5 918 196
Total gross value added (at basic prices)	174 478	108 188	4 756 621	5 039 287
Compensation of employees	91 745	66 279	2 581 388	2 739 413
Taxes less subsidies on production	6 750	1 767	98 796	107 313
Gross operating surplus	75 984	41 141	2 076 437	2 192 561

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.¹² Tables 12a to 12c show the domestic supply and internal tourism consumption by product (Table 6 of the TSA) for the reference years 2017 to 2019. The tourism direct gross value added (TDGVA) for South Africa amounted to R121 680 million (or 2,6% of total GVA generated) in 2017, R134 338 million (or 2,8% of total GVA generated) in 2018 and R196 705 million (or 3,9% of total GVA generated) in 2019.

Tables 13a to 13c show the compilation of tourism industry ratios for the reference years 2017 to 2019.

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.

¹² TSA: RMF

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

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industries	Other industries	Total internal tourism consumption	Taxes less subsidies
	Accommodation for visitors	Food- and beverage-serving industry	Passenger transport industries	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural and sport and recreational industries		Retail trade of tourism-connected goods			
A. Specific products	41 934	17 075	68 379	10 732	20 348	12 176	170 644	12 618	66 677	249 939	
A.1 Characteristic products	41 934	17 075	68 379	10 732	20 348	12 176	170 644		51 980	222 624	
1. Accommodation services for visitors	28 001					1 170	29 170		11 363	40 533	
1.1 Hotel and other accommodation for visitors other than 1.2	28 001					1 170	29 170		11 363	40 533	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Food- and beverage-serving services	1 973	17 075				43	19 090		13 702	32 792	
3. Passenger transportation services			68 379	10 732			79 111		23 391	102 502	
3.1 Railway passenger transportation services			480				480			480	
3.2 Road passenger transportation services			14 830				14 830		23 391	38 221	
3.3 Water passenger transportation services			2 680				2 680			2 680	
3.4 Air passenger transportation services			50 389				50 389			50 389	
3.5 Transport equipment rental services				10 732			10 732			10 732	
4. Travel agencies and other reservation services					20 348		20 348			20 348	
5. Cultural services						4 742	4 742		2 651	7 393	
6. Sports and recreational services	11 960					6 222	18 182		873	19 055	
A.2 Connected products								12 618	14 697	27 315	
Retail sales of food, beverages and tobacco								6 794	7 852	14 645	
Retail sales of textiles, clothing, footwear and leather products								1 737	5 211	6 949	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								157	152	310	
Retail sales of household furniture, appliances, articles and equipment								787	980	1 768	
Retail sales of automotive fuel								3 142	501	3 644	
B. Non-specific products	1 295		1 493			3	2 790	61	31 874	34 724	
Total output (at basic prices)	43 229	17 075	69 871	10 732	20 348	12 180	173 434	12 679	98 551	284 664	10 686
Total intermediate consumption (at purchasers' prices)	17 844	12 575	47 031	6 550	13 981	6 755	104 736	5 323	52 925	162 983	
Total gross value added (at basic prices)	25 384	4 500	22 840	4 183	6 367	5 425	68 698	7 356	45 626	121 680	

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

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

Product	Tourism-characteristic industries						Tourism-connected industries	Other industries	Total internal tourism consumption	Taxes less subsidies
	Accommodation for visitors	Food- and beverage-serving industry	Passenger transport industries	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural and sport and recreational industries	Total tourism-characteristic industries	Retail trade of tourism-connected goods		
A. Specific products	47 456	19 241	73 402	10 984	21 661	12 657	185 401	14 818	74 201	274 420
A.1 Characteristic products	47 456	19 241	73 402	10 984	21 661	12 657	185 401		57 773	243 174
1. Accommodation services for visitors	31 544					1 214	32 758		12 620	45 378
1.1 Hotel and other accommodation for visitors other than 1.2	31 544					1 214	32 758		12 620	45 378
1.2 Accommodation services associated with all types of vacation home ownership										
2. Food- and beverage-serving services	2 246	19 241				47	21 533		14 900	36 433
3. Passenger transportation services			73 402	10 984			84 386		26 402	110 788
3.1 Railway passenger transportation services			519				519			519
3.2 Road passenger transportation services			17 033				17 033		26 402	43 435
3.3 Water passenger transportation services			2 352				2 352			2 352
3.4 Air passenger transportation services			53 498				53 498			53 498
3.5 Transport equipment rental services				10 984			10 984			10 984
4. Travel agencies and other reservation services					21 661		21 661			21 661
5. Cultural services						5 038	5 038		2 903	7 942
6. Sports and recreational services	13 667					6 358	20 024		948	20 972
A.2 Connected products								14 818	16 428	31 246
Retail sales of food, beverages and tobacco								7 879	9 004	16 883
Retail sales of textiles, clothing, footwear and leather products								1 900	5 699	7 599
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								194	171	365
Retail sales of household furniture, appliances, articles and equipment								1 007	1 165	2 172
Retail sales of automotive fuel								3 838	388	4 227
B. Non-specific products	1 416		1 701	1		5	3 121	113	35 341	38 576
Total output (at basic prices)	48 872	19 241	75 103	10 985	21 661	12 662	188 522	14 932	109 542	312 996
Total intermediate consumption (at purchasers' prices)	20 456	14 405	49 370	6 592	14 861	7 337	113 020	6 272	59 366	178 658
Total gross value added (at basic prices)	28 416	4 836	25 733	4 393	6 800	5 325	75 502	8 660	50 176	134 338

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

Table 12c: Internal tourism consumption by product, 2019 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industries	Other industries	Total internal tourism consumption	Taxes less subsidies
	Accommodation for visitors	Food- and beverage-serving industry	Passenger transport industries	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural and sport and recreational industries		Retail trade of tourism-connected goods			
A. Specific products	51 221	30 782	82 349	13 394	22 191	20 014	219 951	20 363	101 654	341 967	
A.1 Characteristic products	51 221	30 782	82 349	13 394	22 191	20 014	219 951		79 665	299 615	
1. Accommodation services for visitors	33 268					1 277	34 546		12 922	47 467	
1.1 Hotel and other accommodation for visitors other than 1.2	33 268					1 277	34 546		12 922	47 467	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Food- and beverage-serving services	3 593	30 782				75	34 449		23 837	58 286	
3. Passenger transportation services			82 349	13 394			95 742		37 901	133 643	
3.1 Railway passenger transportation services			691				691			691	
3.2 Road passenger transportation services			24 452				24 452		37 901	62 352	
3.3 Water passenger transportation services			2 400				2 400			2 400	
3.4 Air passenger transportation services			54 806				54 806			54 806	
3.5 Transport equipment rental services				13 394			13 394			13 394	
4. Travel agencies and other reservation services					22 191		22 191			22 191	
5. Cultural services						6 279	6 279		3 545	9 824	
6. Sports and recreational services	14 361					12 383	26 743		1 460	28 204	
A.2 Connected products								20 363	21 989	42 352	
Retail sales of food, beverages and tobacco								12 082	13 807	25 888	
Retail sales of textiles, clothing, footwear and leather products								2 059	6 178	8 238	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								273	240	513	
Retail sales of household furniture, appliances, articles and equipment								1 101	1 274	2 374	
Retail sales of automotive fuel								4 848	490	5 338	
B. Non-specific products	1 488		2 238	2		13	3 736	279	105 491	109 506	
Total output (at basic prices)	52 710	30 782	84 586	13 397	22 191	20 027	223 687	20 641	207 145	451 474	12 446
Total intermediate consumption (at purchasers' prices)	22 062	23 046	54 547	8 038	15 225	11 286	134 205	8 670	111 894	254 769	
Total gross value added (at basic prices)	30 647	7 736	30 038	5 358	6 966	8 741	89 482	11 971	95 251	196 705	

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

Table 13a: 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 industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	41 934	17 075	480	14 830	2 680	50 389	10 732	20 348	5 399	6 777	12 618
A.1 Characteristic products	41 934	17 075	480	14 830	2 680	50 389	10 732	20 348	5 399	6 777	
1. Accommodation services for visitors	28 001								654	516	
1.1 Hotel and other accommodation for visitors other than 1.2	28 001								654	516	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Food- and beverage-serving services	1 973	17 075							4	39	
3. Passenger transportation services			480	14 830	2 680	50 389	10 732				
3.1 Railway passenger transportation services			480								
3.2 Road passenger transportation services				14 830							
3.3 Water passenger transportation services					2 680						
3.4 Air passenger transportation services						50 389					
3.5 Transport equipment rental services							10 732				
4. Travel agencies and other reservation services								20 348			
5. Cultural services									4 742		
6. Sports and recreational services	11 960									6 222	
A.2 Connected products											12 618
Retail sales of food, beverages and tobacco											6 794
Retail sales of textiles, clothing, footwear and leather products											1 737
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											157
Retail sales of household furniture, appliances, articles and equipment											787
Retail sales of automotive fuel											3 142
B. Non-specific products	1 295			1 492	1					3	61
Total purchased by visitors	43 229	17 075	480	16 321	2 681	50 389	10 732	20 348	5 400	6 780	12 679
Total industry output	57 945	69 959	6 906	67 331	3 876	52 511	18 079	20 763	29 140	60 560	165 662
Tourism industry ratio (%)	75	24	7	24	69	96	59	98	19	11	8

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

Table 13b: 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 industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	47 456	19 241	519	17 033	2 352	53 498	10 984	21 661	5 694	6 963	14 818
A.1 Characteristic products	47 456	19 241	519	17 033	2 352	53 498	10 984	21 661	5 694	6 963	
1. Accommodation services for visitors	31 544								652	562	
1.1 Hotel and other accommodation for visitors other than 1.2	31 544								652	562	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Food- and beverage-serving services	2 246	19 241							4	43	
3. Passenger transportation services			519	17 033	2 352	53 498	10 984				
3.1 Railway passenger transportation services			519								
3.2 Road passenger transportation services				17 033							
3.3 Water passenger transportation services					2 352						
3.4 Air passenger transportation services						53 498					
3.5 Transport equipment rental services							10 984				
4. Travel agencies and other reservation services								21 661			
5. Cultural services									5 038		
6. Sports and recreational services	13 667									6 358	
A.2 Connected products											14 818
Retail sales of food, beverages and tobacco											7 879
Retail sales of textiles, clothing, footwear and leather products											1 900
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											194
Retail sales of household furniture, appliances, articles and equipment											1 007
Retail sales of automotive fuel											3 838
B. Non-specific products	1 416			1 699	2		1		1	4	113
Total purchased by visitors	48 872	19 241	519	18 732	2 354	53 498	10 985	21 661	5 695	6 967	14 932
Total industry output	63 375	75 747	7 447	70 725	3 367	55 707	18 714	22 103	29 396	63 507	177 523
Tourism industry ratio (%)	77	25	7	26	70	96	59	98	19	11	8

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

Table 13c: Derivation of tourism industry ratios, 2019 (R million)

Product	Tourism-characteristic industries										Tourism-connected industries
	Accommodation for visitors	Food- and beverage-serving industry	Railway passenger transport industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	51 221	30 782	691	24 452	2 400	54 806	13 394	22 191	6 971	13 043	20 363
A.1 Characteristic products	51 221	30 782	691	24 452	2 400	54 806	13 394	22 191	6 971	13 043	
1. Accommodation services for visitors	33 268								686	591	
1.1 Hotel and other accommodation for visitors other than 1.2	33 268								686	591	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Food- and beverage-serving services	3 593	30 782							6	69	
3. Passenger transportation services			691	24 452	2 400	54 806	13 394				
3.1 Railway passenger transportation services			691								
3.2 Road passenger transportation services				24 452							
3.3 Water passenger transportation services					2 400						
3.4 Air passenger transportation services						54 806					
3.5 Transport equipment rental services							13 394				
4. Travel agencies and other reservation services								22 191			
5. Cultural services									6 279		
6. Sports and recreational services	14 361									12 383	
A.2 Connected products											20 363
Retail sales of food, beverages and tobacco											12 082
Retail sales of textiles, clothing, footwear and leather products											2 059
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											273
Retail sales of household furniture, appliances, articles and equipment											1 101
Retail sales of automotive fuel											4 848
B. Non-specific products	1 488			2 233	5		2		2	11	279
Total purchased by visitors	52 710	30 782	691	26 685	2 404	54 806	13 397	22 191	6 973	13 054	20 641
Total industry output	66 594	79 594	7 629	72 457	3 450	57 071	19 776	22 644	30 815	66 573	186 538
Tourism industry ratio (%)	79	39	9	37	70	96	68	98	23	20	11

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

Table 6¹³ 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.¹⁴ 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.¹⁵ 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: Relationships 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.

¹³ This table is the core of the TSA.

¹⁴ TSA: RMF

¹⁵ TSA: RMF

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

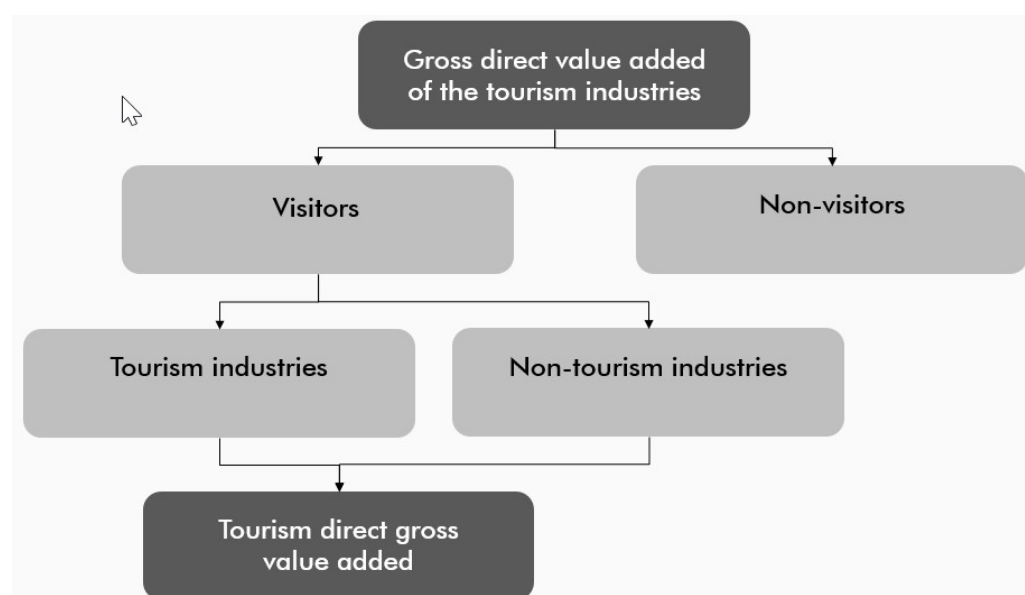


Table 15 shows the calculation of TDGVA and TDGDP for South Africa for 2015 to 2019. TDGDP was R209 151 million (or 3,7% of total GDP) in 2019.

Table 15: Tourism direct gross value added and tourism direct gross domestic product, 2015–2019 (R million)

	2015	2016	2017	2018	2019
Total supply of goods and services	10 488 258	11 161 678	11 736 731	12 505 171	13 025 831
Less imports of goods and services	1 282 606	1 318 643	1 330 275	1 447 581	1 502 601
Less net taxes (taxes less subsidies) on products	439 035	470 714	485 740	537 275	565 747
Equals total domestic supply of goods and services (output)	8 766 617	9 372 322	9 920 716	10 520 316	10 957 483
Less intermediate consumption	4 784 859	5 083 483	5 328 266	5 699 951	5 918 196
Gross value added of the economy	3 981 758	4 288 839	4 592 450	4 820 365	5 039 287
Total tourism output	277 228	304 419	284 664	312 996	451 474
Less					
Total tourism intermediate consumption	159 751	175 074	162 983	178 658	254 769
Equals tourism direct gross value added (TDGVA)	117 476	129 344	121 680	134 338	196 705
TDGVA (% of GVA)	3,0	3,0	2,6	2,8	3,9
Tourism direct gross value added	117 476	129 344	121 680	134 338	196 705
Plus					
Tourism share of net taxes on products	9 659	10 356	10 686	11 820	12 446
Equals tourism direct gross domestic product (TDGDP)	127 135	139 700	132 366	146 158	209 151
TDGDP¹⁶ (% of GDP)	2,9	2,9	2,6	2,7	3,7

Table 16 and Table 17 as well as Figure 7 show TDGVA for 2015 to 2019 (R million and percentage contribution).

¹⁶ Gross domestic product is equal to gross value added plus net taxes on products.

Table 16: Tourism direct gross value added, 2015–2019 (R million)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	23 825	25 500	25 384	28 416	30 647
Food- and beverage-serving industry	5 181	5 572	4 500	4 836	7 736
Railway passenger transportation industry	290	305	328	350	465
Road passenger transportation industry	7 719	8 070	7 515	8 929	12 720
Water passenger transportation industry	978	1 088	1 222	1 300	1 328
Air passenger transportation industry	10 694	11 880	13 775	15 154	15 525
Transport equipment rental industry	3 998	4 052	4 183	4 393	5 358
Travel agencies and similar services industry	4 962	5 740	6 367	6 800	6 966
Cultural industry	1 893	2 117	1 997	1 906	2 334
Sports and recreational industry	4 297	4 905	3 428	3 419	6 407
Retail trade of tourism-connected goods	7 265	7 461	7 356	8 660	11 971
Other non-tourism industries	46 377	52 655	45 626	50 176	95 251
Total	117 476	129 344	121 680	134 338	196 705

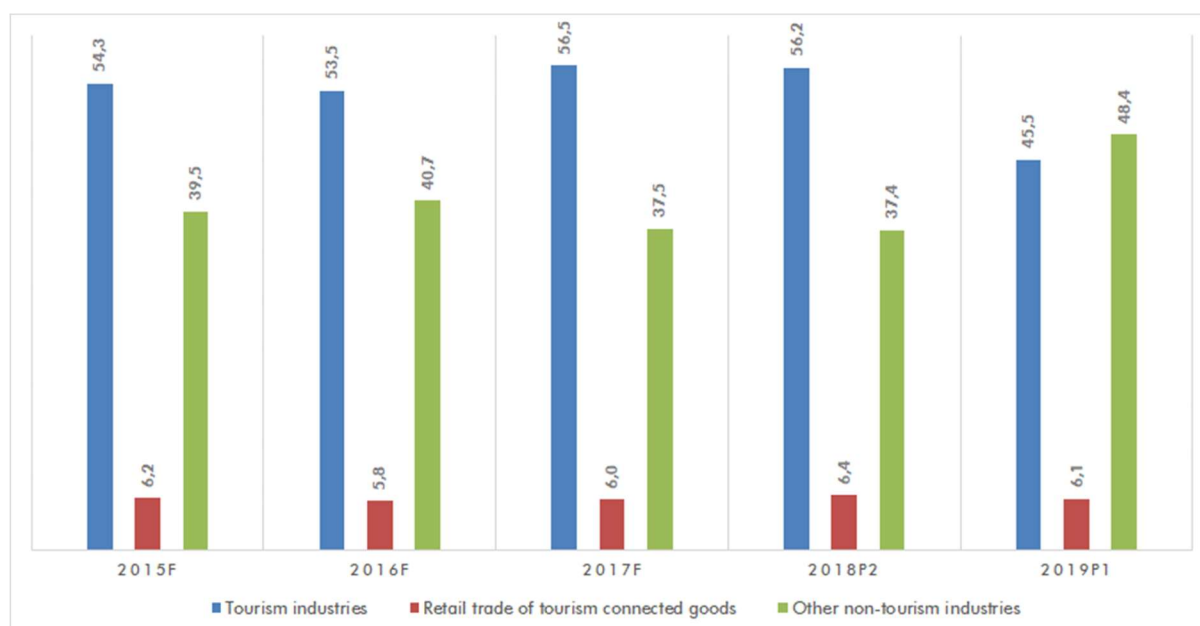
Individual figures may not add up to stated totals due to rounding.

Table 17: Tourism direct gross value added, 2015–2019 (%)

Tourism product	2015	2016	2017	2018	2019
Accommodation services for visitors	20,3	19,7	20,9	21,2	15,6
Food- and beverage-serving industry	4,4	4,3	3,7	3,6	3,9
Railway passenger transportation industry	0,2	0,2	0,3	0,3	0,2
Road passenger transportation industry	6,6	6,2	6,2	6,6	6,5
Water passenger transportation industry	0,8	0,8	1,0	1,0	0,7
Air passenger transportation industry	9,1	9,2	11,3	11,3	7,9
Transport equipment rental industry	3,4	3,1	3,4	3,3	2,7
Travel agencies and similar services industry	4,2	4,4	5,2	5,1	3,5
Cultural industry	1,6	1,6	1,6	1,4	1,2
Sports and recreational industry	3,7	3,8	2,8	2,5	3,3
Retail trade of tourism-connected goods	6,2	5,8	6,0	6,4	6,1
Other non-tourism industries	39,5	40,7	37,5	37,4	48,4
Total	100,0	100,0	100,0	100,0	100,0

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

Figure 7: Tourism direct gross value added, 2015–2019 (% 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.¹⁷ 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 2017 to 2019. There were 575 910 persons (or 3,6% of total employment) directly engaged in producing goods and services purchased by visitors in 2017, 611 737 persons (or 3,7% of total employment) in 2018 and 773 533 (or 4,7% of total employment) in 2019. Tourism industry ratios have been used to allocate employment numbers (by industry) to tourism.¹⁸

¹⁷ TSA: RMF

¹⁸ 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, 2017 (No. of persons)

Population group	Accommodation for visitors	Food- and beverage-serving industry	Railway passenger transport industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
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
Total	170 540	386 760	73 881	613 731	6 567	29 742	14 900	31 592	92 227	74 340	1 333 742	2 828 023

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

Table 18a: 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 industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Tourism industry ratio (%)	75	24	7	24	69	96	59	98	19	11	8	
Tourism employment												
Black African	97 045	75 438	4 148	124 080	1 042	14 720	6 446	17 740	10 914	5 920	75 287	432 780
Male	38 620	27 286	2 957	113 377	667	7 409	5 540	12 008	7 416	2 607	36 072	235 959
Female	58 425	48 152	1 190	10 703	375	7 311	906	5 732	3 499	3 313	39 215	178 821
Coloured	15 620	8 374	256	10 882	1 394	1 868	1 223	4 136	1 550	804	12 301	58 409
Male	5 037	2 509	232	9 410	602	873	0	3 091	746	520	5 045	28 064
Female	10 583	5 865	25	1 472	792	995	1 223	1 046	805	284	7 256	30 345
Indian/Asian	2 185	2 127	81	6 751	1 156	2 061	0	1 957	438	356	5 853	22 965
Male	798	1 728	61	5 298	1 156	2 061	0	1 304	75	299	4 217	16 996
Female	1 387	399	20	1 453	0	0	0	653	363	57	1 637	5 969
White	12 379	8 458	653	7 056	952	9 891	1 176	7 127	4 186	1 243	8 635	61 756
Male	5 838	3 592	643	4 999	278	6 820	563	4 047	2 324	652	4 998	34 753
Female	6 541	4 866	10	2 057	673	3 071	614	3 080	1 863	591	3 637	27 003
Total	127 228	94 397	5 137	148 769	4 543	28 541	8 845	30 960	17 089	8 323	102 077	575 910

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, 2018 (No. of persons)

Population group	Accommodation for visitors	Food- and beverage-serving industry	Railway passenger transport industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
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
Total	163 157	380 788	68 545	623 521	3 892	30 250	19 424	31 957	95 427	85 957	1 389 385	2 892 303

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

Table 18b: 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 industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Tourism industry ratio (%)	77	25	7	26	70	96	59	98	19	11	8	
Tourism employment												
Black African	96 206	75 145	3 409	137 295	802	17 600	8 150	19 725	10 843	6 481	84 862	460 517
Male	40 090	25 915	2 509	124 464	276	7 155	6 810	13 651	6 291	3 678	41 518	272 357
Female	56 117	49 229	900	12 832	526	10 445	1 340	6 074	4 551	2 803	43 343	186 161
Coloured	14 557	8 907	502	12 121	378	3 739	1 803	4 530	1 863	1 039	14 676	64 115
Male	5 125	3 146	382	10 326	143	2 308	913	2 592	1 222	529	6 551	33 237
Female	9 433	5 761	120	1 795	235	1 431	890	1 937	641	510	8 125	30 878
Indian/Asian	230	2 448	163	5 847	1 288	168	0	1 938	325	249	6 721	19 378
Male	106	1 510	163	4 817	784	168	0	1 257	251	154	4 495	13 704
Female	124	939	0	1 030	504	0	0	681	74	95	2 227	5 674
White	14 826	10 225	705	9 879	253	7 543	1 449	5 125	5 457	1 661	10 603	67 726
Male	6 472	5 590	647	7 565	0	5 552	1 449	2 404	3 165	996	5 449	39 290
Female	8 353	4 635	58	2 315	253	1 990	0	2 721	2 292	665	5 154	28 437
Total	125 819	96 725	4 779	165 144	2 721	29 050	11 402	31 318	18 487	9 430	116 862	611 737

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, 2019 (No. of persons)

Population group	Accommodation for visitors	Food- and beverage-serving industry	Railway passenger transport industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	113 548	296 487	53 606	549 165	0	16 065	10 636	19 775	57 752	62 999	981 617	2 161 649
Male	48 572	114 763	36 605	509 188	0	6 696	6 414	12 188	37 254	33 869	480 305	1 285 854
Female	64 975	181 723	17 001	39 978	0	9 369	4 221	7 587	20 498	29 130	501 312	875 794
Coloured	20 635	37 428	3 966	39 850	402	6 115	1 326	4 399	9 671	11 562	164 939	300 293
Male	6 145	10 580	3 274	35 307	257	3 314	916	1 586	4 635	8 591	72 826	147 431
Female	14 490	26 848	693	4 542	144	2 801	410	2 813	5 036	2 972	92 113	152 862
Indian/Asian	776	13 980	4 251	21 512	0	310	284	1 859	1 674	3 678	86 345	134 669
Male	577	8 074	4 251	19 019	0	310	284	611	1 114	3 050	63 042	100 332
Female	199	5 906	0	2 493	0	0	0	1 248	560	628	23 303	34 337
White	14 560	34 359	7 955	44 285	143	7 231	2 466	7 168	17 367	9 833	137 353	282 719
Male	7 033	21 640	6 372	27 225	143	6 167	1 288	3 919	7 866	6 110	74 240	162 003
Female	7 527	12 719	1 583	17 059	0	1 064	1 178	3 249	9 501	3 722	63 113	120 716
Total	149 519	382 254	69 779	654 812	544	29 720	14 711	33 200	86 463	88 072	1 370 254	2 879 330

Individual figures may not add up to stated totals due to rounding.
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2019*

Table 18c: Employment in the tourism industries by population group and gender, 2019 (No. of persons) (concluded)

Population group	Accommodation for visitors	Food- and beverage-serving industry	Railway passenger transport industry	Road passenger transport industry	Water passenger transport industry	Air passenger transport industry	Transport equipment rental industry	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Tourism industry ratio (%)	79	39	9	37	70	96	68	98	23	20	11	
Tourism employment												
Black African	89 874	114 663	4 854	202 247	0	15 427	7 205	19 379	13 068	12 353	108 621	587 691
Male	38 445	44 384	3 314	187 524	0	6 430	4 345	11 944	8 430	6 641	53 148	364 606
Female	51 429	70 280	1 539	14 723	0	8 997	2 860	7 435	4 638	5 712	55 473	223 085
Coloured	16 333	14 475	359	14 676	280	5 872	898	4 311	2 188	2 267	18 251	79 911
Male	4 864	4 092	296	13 003	179	3 182	620	1 554	1 049	1 685	8 059	38 583
Female	11 469	10 383	63	1 673	101	2 690	278	2 757	1 139	583	10 193	41 328
Indian/Asian	614	5 407	385	7 922	0	298	192	1 822	379	721	9 555	27 294
Male	457	3 123	385	7 004	0	298	192	598	252	598	6 976	19 883
Female	157	2 284	0	918	0	0	0	1 223	127	123	2 579	7 411
White	11 525	13 288	720	16 309	99	6 944	1 670	7 024	3 930	1 928	15 199	78 637
Male	5 567	8 369	577	10 027	99	5 922	873	3 841	1 780	1 198	8 215	46 467
Female	5 958	4 919	143	6 283	0	1 022	798	3 184	2 150	730	6 984	32 169
Total	118 346	147 833	6 318	241 155	379	28 541	9 966	32 536	19 564	17 269	151 625	773 533

Individual figures may not add up to stated totals due to rounding.
Source: Statistics South Africa, *Quarterly Labour Force Survey, 2019*

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

In accordance with the recommendations set out by the TSA: RMF 2008, the South African TSA for the reference years 2017 to 2019 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 2018 to 2020, and is scheduled to be published by the end of March 2023. 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.

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
---------	---

2. Food and beverage-serving services

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

3. Passenger transport services

3.1 Inter-urban railway transport services

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

3.2 Road transport services

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

3.3 Water transport services

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

3.4 Air transport services

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

3.5 Supporting passenger transport services

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

3.6 Passenger transport equipment rental

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

3.7 Maintenance and repair services of passenger transport equipment

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

4. Travel agency, tour operator and tourist guide services

4.1 Travel agency services

67811.0	Travel agency services
---------	------------------------

4.2 Tour operator services

67812.0	Tour operator services
---------	------------------------

4.3 Tourist information and tourist guide services

67813.0	Tourist information services
67820.0	Tourist guide services

5. Cultural services

5.1 Performing arts

96230.0	Performing arts facility operation services
96310.0	Services of performing artists

5.2 Museum and other cultural services

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

6. Recreation and other entertainment services

6.1 Sports and recreational services

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

6.2 Other amusement and recreational services

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

7. Miscellaneous tourism services

7.1 Financial and insurance services

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

7.2 Other rental services

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

7.3 Other tourism services

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

Annexure B: List of tourism-characteristic activities

Tourism-characteristic activities can be identified as those productive activities whose principal output is characteristic of tourism. As the set of these activities does not comprise a single industry conforming to the SNA 2008 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 A1: 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. SNA 2008 states explicitly that physical indicators are an important component of satellite accounts and therefore should be viewed as a secondary part of the TSA.¹⁹ 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, 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	-	-	-	70 100 000	-	-	-	-	-

(*) 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, 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	-	-	-	69 300 000	-	-	-	-	-

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

¹⁹ TSA: RMF

Table B3: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2019 ('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 (*)	10 228 593	4 568 879	14 797 472	69 033 000	82 973 000	152 006 000	-	-	-
Number of bed nights	-	-	-	94 100 000	-	-	-	-	-

(*) 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		
Total		

Table D1: 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)	79 400	47 500	-	-
Stay unit nights sold	15 024 600	8 100 400	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	51,8%	44,5%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D2: 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)	79 800	47 500	-	-
Stay unit nights sold	14 828 400	7 644 800	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	50,9%	43,3%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D3: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2019

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	3 023	7 443	-	-
Capacity (stay units)	79 700	47 500	-	-
Stay unit nights sold	14 618 000	7 769 500	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	50,2%	44,1%	-	-
Capacity utilisation (beds)	-	-	-	-

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

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

Glossary

Domestic tourism	The tourism of resident visitors within the economic territory of the country of reference.
Domestic tourism consumption	Domestic tourism consumption is the consumption of domestic tourism; that is, the consumption incurred as a direct result of resident visitors travelling within their country of residence. These purchases might include goods or even services produced abroad or by non-residents but sold within the domestic economy (imported goods and services).
Household final consumption expenditure	Household final consumption expenditure includes all consumption expenditure made by households from their own cash resources (including all income in cash received), as well as all the counterpart of income in kind (except social transfers in kind) that households might have received, such as remuneration in kind and other transfers in kind. It also includes the value of all consumption of output for own final use, such as that provided by second homes on own account used for tourism purposes or what was 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 whose 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 visitors or on behalf of visitors for and during their 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.

Related Tourism Satellite Account publications

Statistics South Africa, 2005. *Status of the Tourism Satellite Account in South Africa*. Discussion document (D0405.3). Pretoria: Statistics South Africa.

Statistics South Africa, 2007. *Country experience in the compilation of Tourism Satellite Accounts*. Discussion document (D0405.4). Pretoria: Statistics South Africa.

Statistics South Africa, 2007. *Statistics of the Tourism Satellite Account and assessment of data sources related to tourism in South Africa*. Discussion document (D0405.5). Pretoria: Statistics South Africa.

Statistics South Africa, 2007. *Linking Government Strategies and the Tourism Satellite Account in South Africa*. Discussion document (D0405.6). Pretoria: Statistics South Africa.

Statistics South Africa, 2009. *Draft Tourism Satellite Account for South Africa, 2005*. Discussion document (D0405.7). Pretoria: Statistics South Africa.

Statistics South Africa, 2010. *Tourism Satellite Account for South Africa, final 2005 and provisional 2006 and 2008*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2011. *Tourism Satellite Account for South Africa, final 2006 and 2007 and provisional 2008 and 2009*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2012. *Tourism Satellite Account for South Africa, provisional 2010*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2013. *Tourism Satellite Account for South Africa, final 2008 and 2009 and provisional 2010 and 2011*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2014. *Tourism Satellite Account for South Africa, final 2009 and 2010 and provisional 2011 and 2012*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2015. *Tourism Satellite Account for South Africa, final 2011 and provisional 2012 and 2013*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2016. *Tourism Satellite Account for South Africa, final 2012 and provisional 2013 and 2014*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2016. *Tourism Satellite Account for South Africa, final 2013 and provisional 2014 and 2015*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2018. *Tourism Satellite Account for South Africa, final 2014 and provisional 2015 and 2016*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2018. *Tourism Satellite Account for South Africa, final 2015 and provisional 2016 and 2017*. Report No: 04-05-07. Pretoria: Statistics South Africa.

Statistics South Africa, 2019. *Tourism Satellite Account for South Africa, final 2016 and provisional 2017 and 2018*. Report No: 04-05-07. Pretoria: Statistics South Africa.