

# Tourism in South Africa



A statistical overview

# Purpose of presentation

Purpose of the presentation is to present different tourism statistics produced by Stats SA

People like to travel – we are a country and continent on the move...



# Stats SA publishes tourism related information in four reports

## **Tourism satellite account for South Africa**

Provides information on the contribution of tourism to the South African economy

## **Tourism and Migration**

Provides information on the number of international visitors to South Africa

## **Domestic tourism survey**

Provides information on the travel behavior of domestic tourists

## **Tourist accommodation**

Provides information on the income earned in the accommodation industry from various types of accommodation

# Tourism satellite account for South Africa

# Tourism satellite account for South Africa

- A satellite account is aimed at providing additional information to the central framework of the National Accounts
- A satellite account provides the perfect framework for statistical coordination and economic analysis.
- What is special about tourism?
  - Tourists consume products from various other industries
  - A tourist's consumption falls outside their usual environment
  - The TSA can extract the tourism consumption across multiple industries to form the 'tourism sector'.

# Tourism satellite account for South Africa

- Released as an annual report
- Latest data available: 2015
- Can be used to answer the following questions:
  - How much does tourism contribute to the economy?
  - How many jobs has the industry created?
  - How much money do tourists spend?

# Data Sources

- Income and Expenditure Survey
- Annual Financial Survey
- Large Sample Survey
- Tourism Accommodation survey
- Tourism and Migration survey
- Domestic Tourism Survey
- Balance of Payments from the South African Reserve Bank
- Departure Survey (SA Tourism)
- Domestic Survey (SA Tourism)
  
- Supply and Use Tables
  - Core framework of the TSA



# How large is tourism?

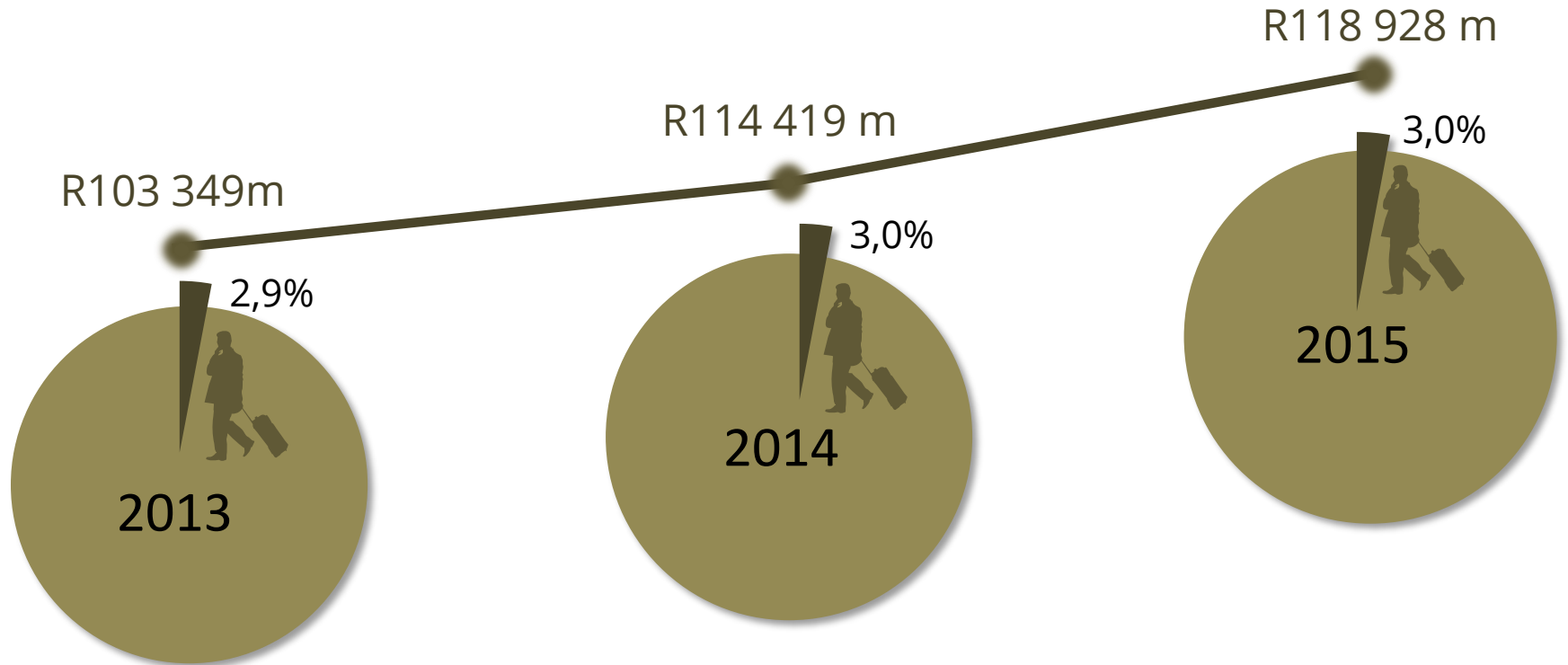


South Africa:  
**3,0%** of the  
GDP in 2015

Total tourism direct  
contribution to GDP, 2015  
**R118 928 million**

# How large is tourism?

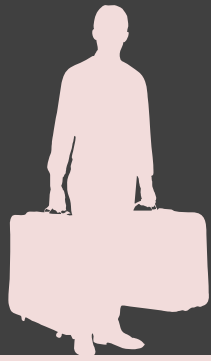
Tourism direct contribution to the GDP: 2013 to 2015



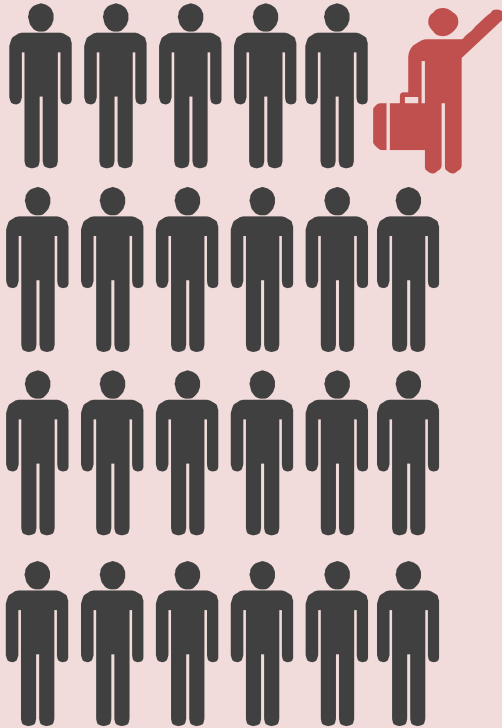
# How large is tourism?



**3,1%** of the  
**GVA in 2015**  
(R109 605 million)



# How many are employed?



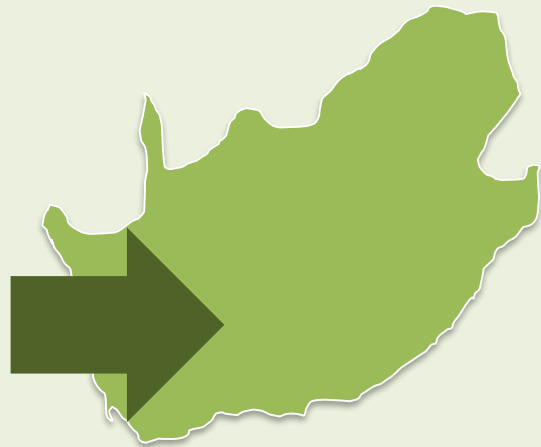
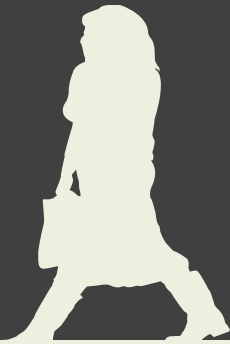
In 2015  
tourism employed  
**1 in 22 people**  
(711 746 individuals)

# The value of outbound tourism



**R72 712m**  
in 2015

# The contribution of inbound tourism



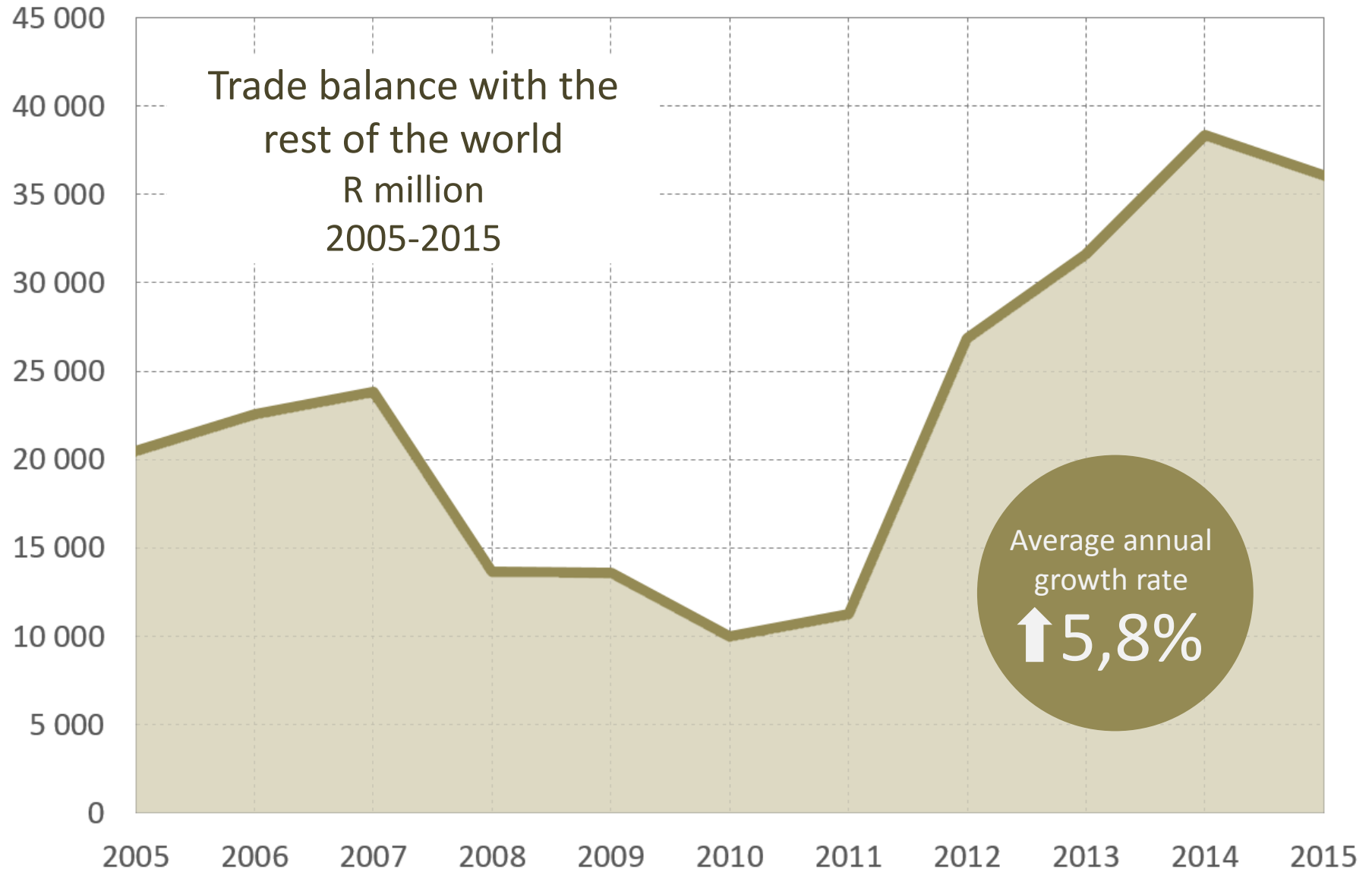
**R108 760m**  
in 2015

# The value of the trade balance

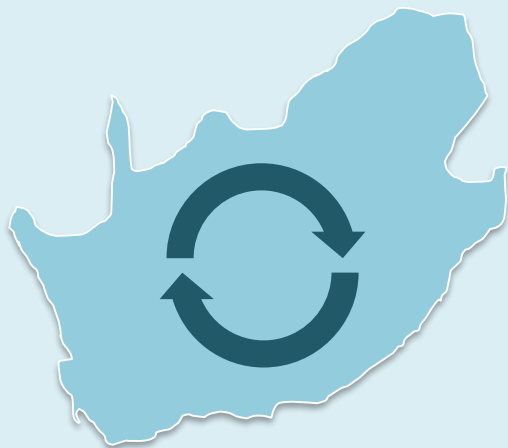
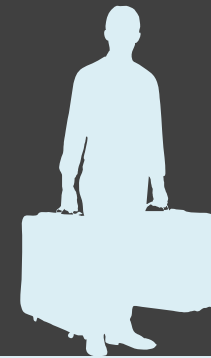


**R36 048m**  
in 2015



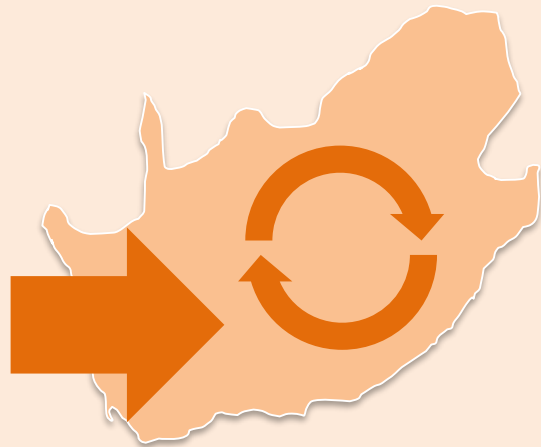


# The value of domestic tourism



**R140 931m**  
in 2015

# The value of internal tourism



**R249 691**  
in 2015

**Inbound + Domestic**

Non-resident visitors

resident visitors

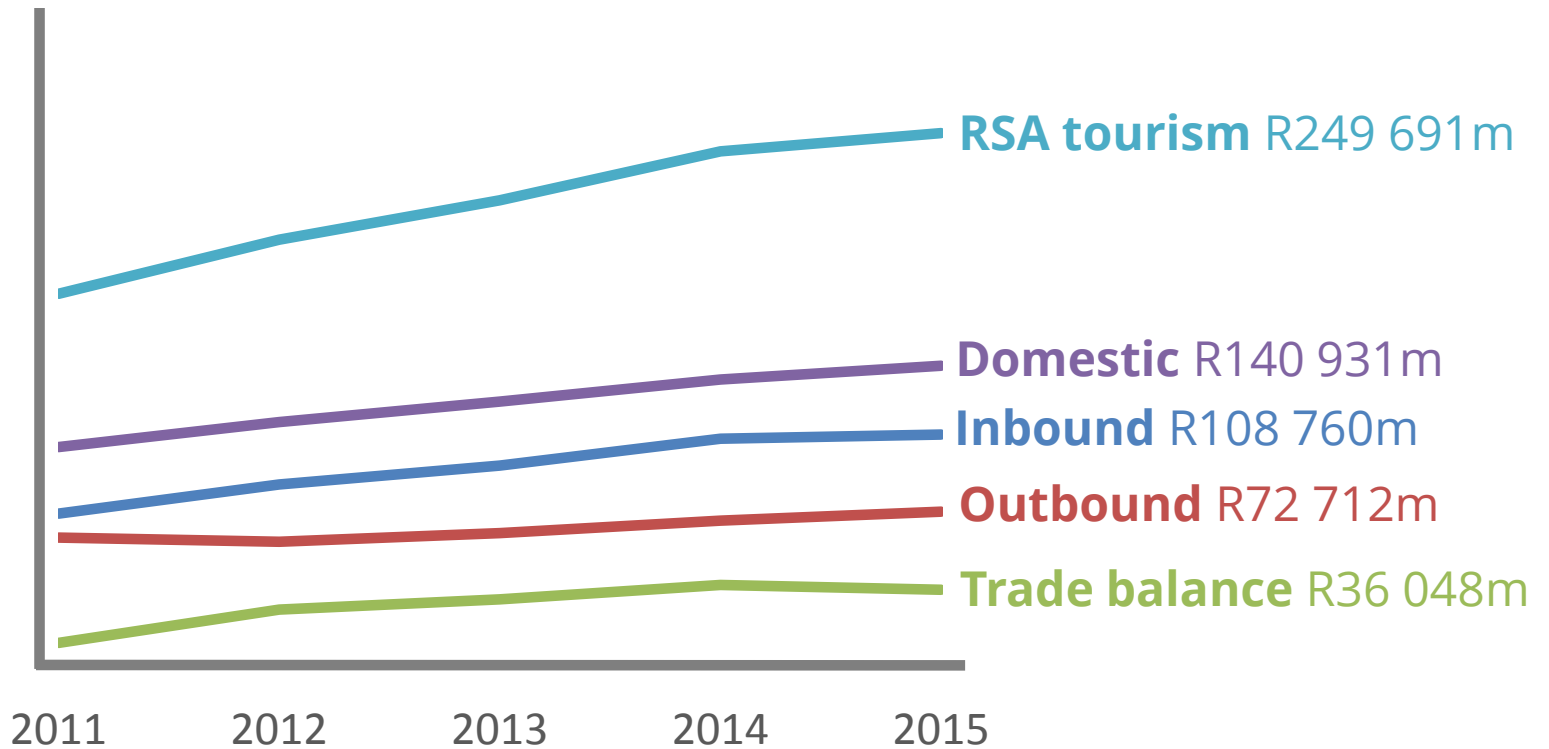
# What is the value of tourism expenditure?

Tourism expenditure

**Inbound**  
Non-resident visitors

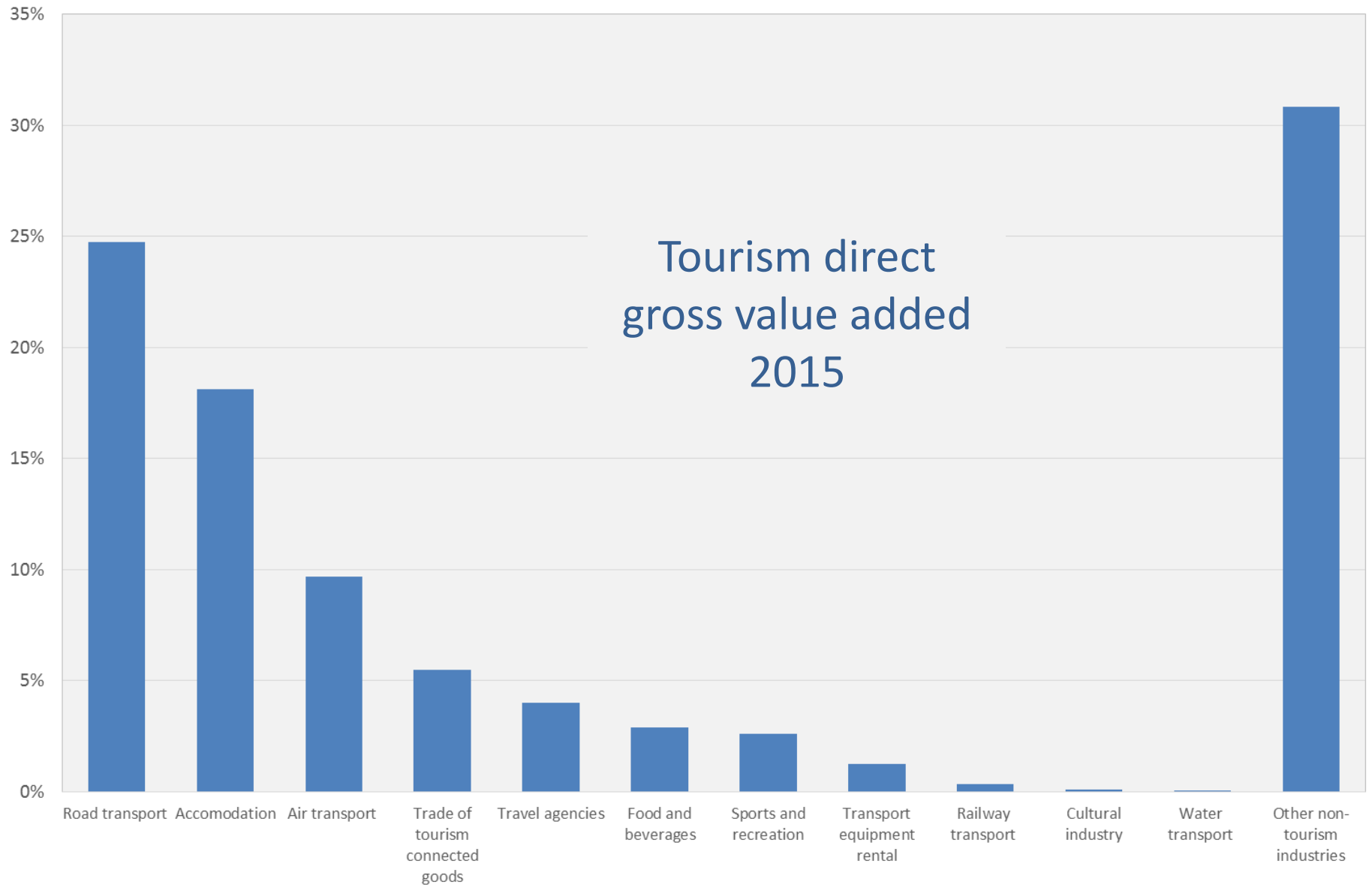


**Domestic**  
resident visitors



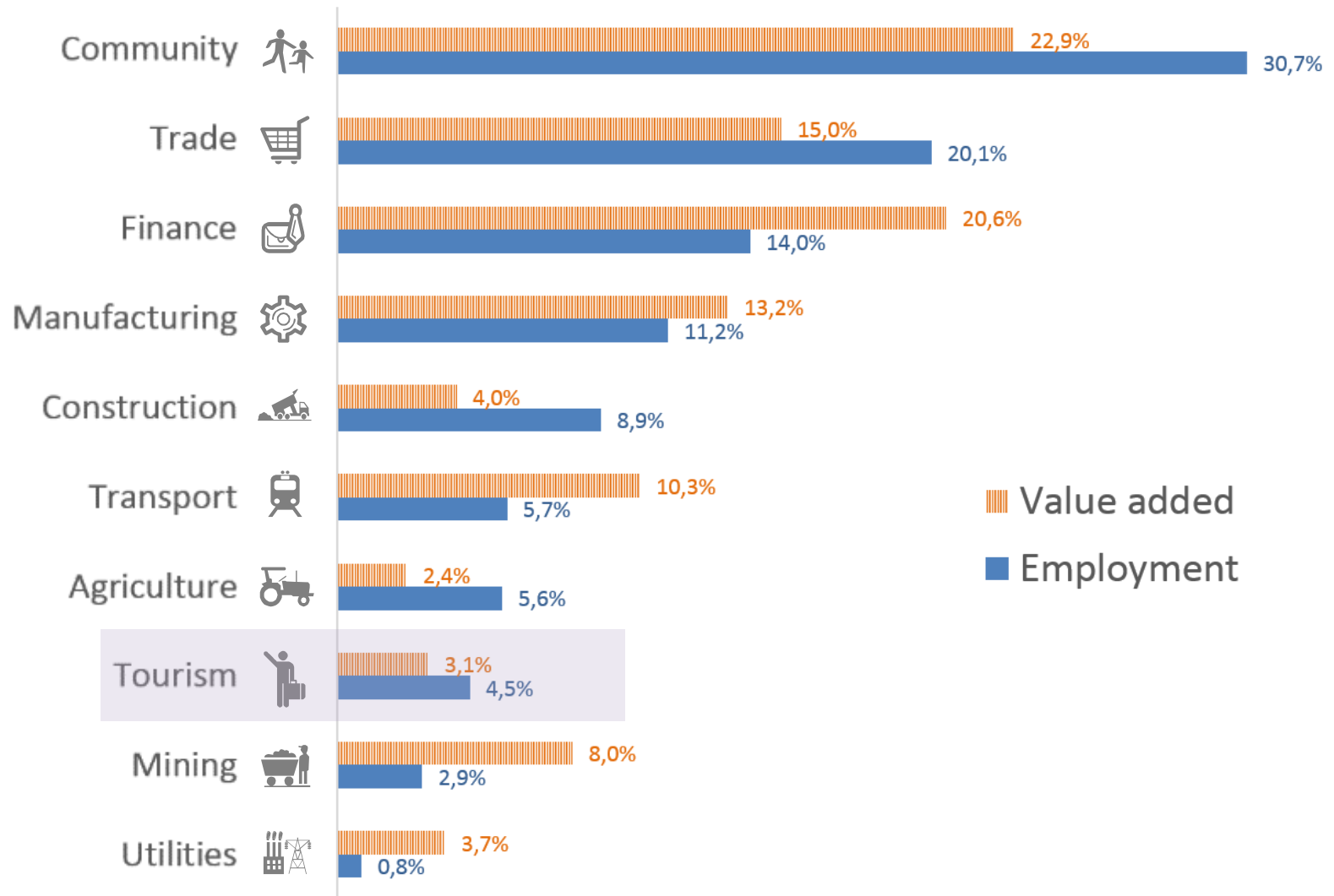
# Tourism contribution to value added

## Tourism direct gross value added 2015



# Industry comparisons

# Industry comparison: contributions to value added and employment: 2015





# Tourism and Migration

# Tourism and Migration

- Provides information on international visitors
- Data are sourced from the Department of Home Affairs, from ports of entry
- Monthly and annual reports
- Can answer the following questions:
  - When do tourists prefer to visit?
  - How long do tourists stay in the country?
  - Where do tourists come from?
  - Main purpose of travel?

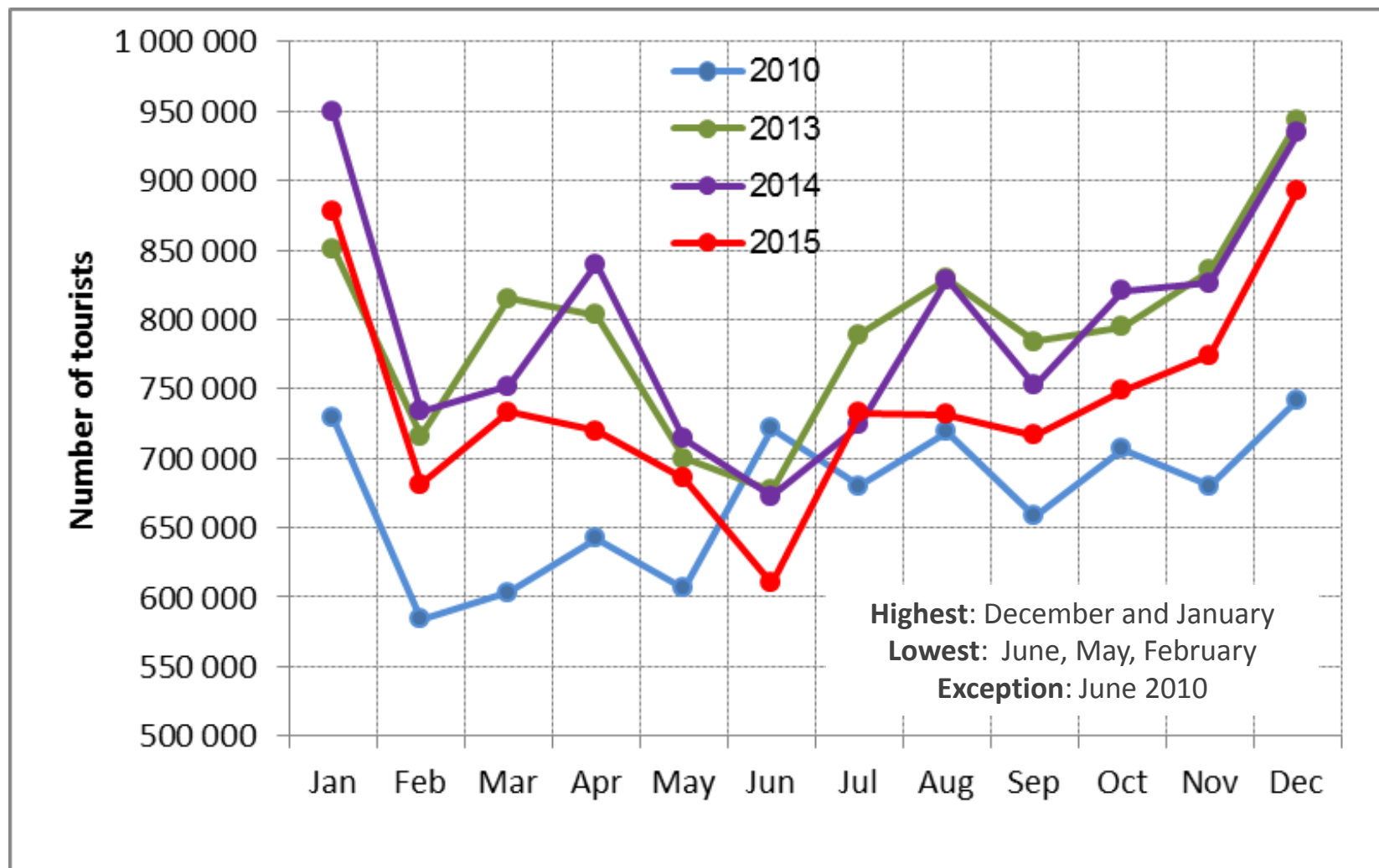
# Data sources and analysis

- Administration data from the Department of Home Affairs
- Check for any new country names
- Create new variables
- Scan for duplicate entries
- Quality controls
  - Consistency in the records
  - Data available at expected ports

**8,9 million**  
tourists visited South Africa  
in 2015

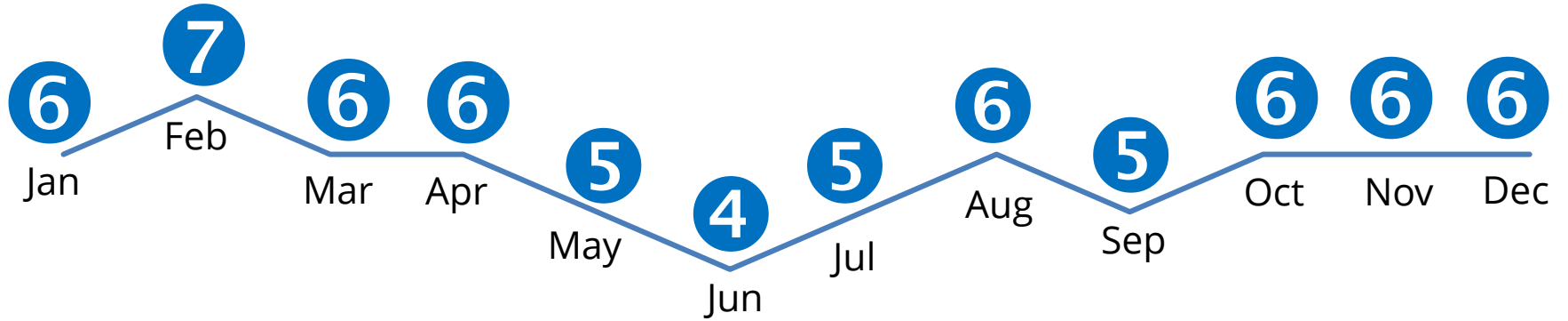
# When do tourists prefer to visit?

Number of tourists by month and year: 2010, 2013, 2014 and 2015



# How long do tourists stay in the country?

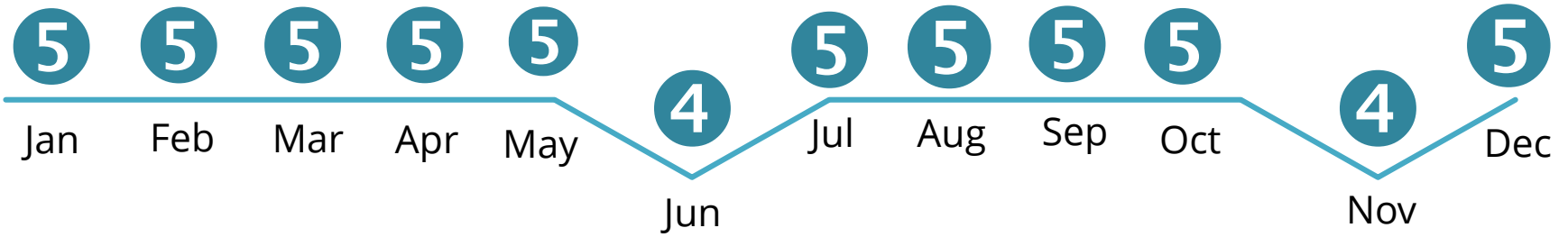
Average number of **days** by month **2015**



**Average  
6 days**

# How long do tourists stay in the country?

Average number of **days** by month **2015**

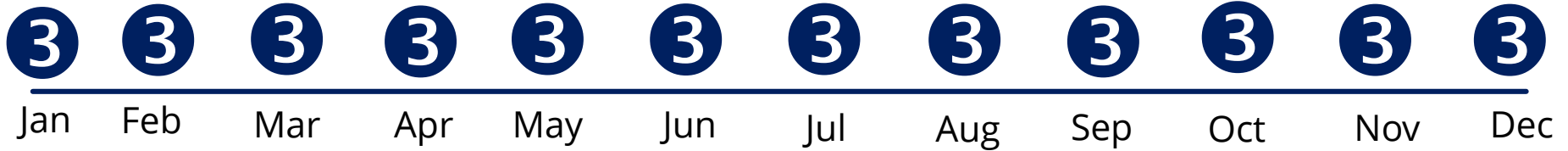


Other African countries



# How long do tourists stay in the country?

Average number of **days** by month **2015**





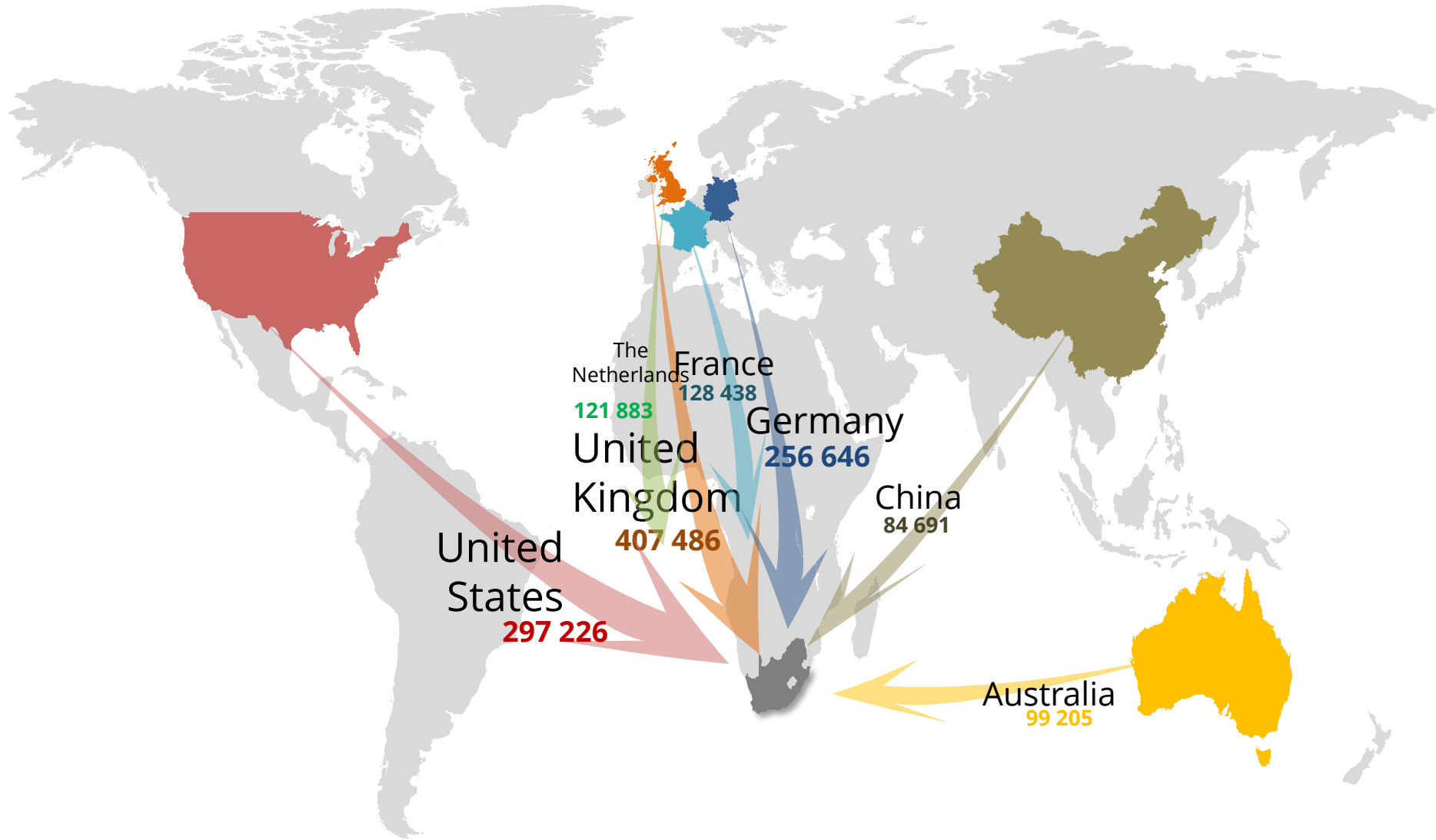


**Average number of days tourists spend:**

**3** days

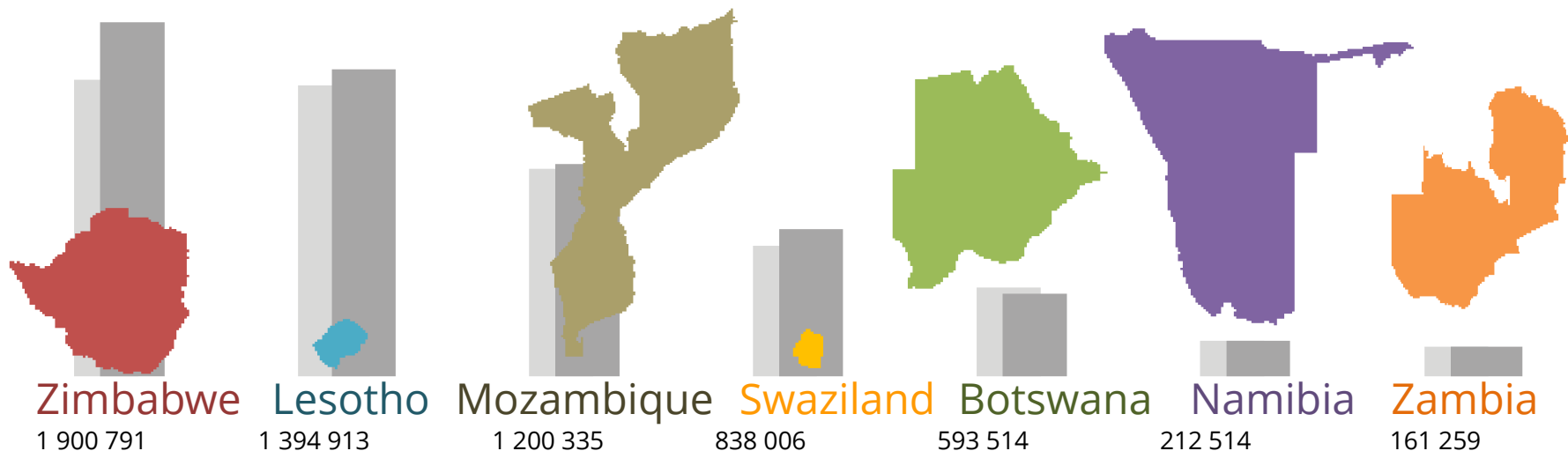
# Where do tourists come from?

Overseas tourists from 7 leading countries : 2015



# Where do tourists come from?

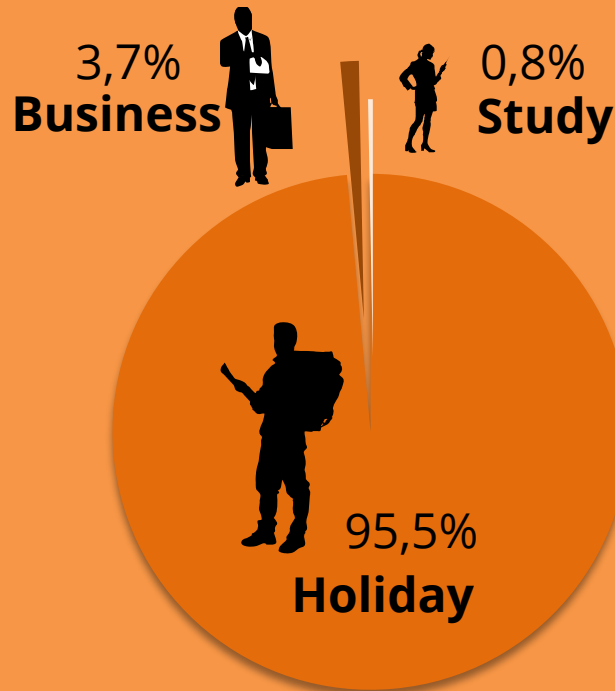
Overseas tourists from 7 leading SADC countries: 2015



## Tourists from 7 leading other African countries



# Main purpose of travel

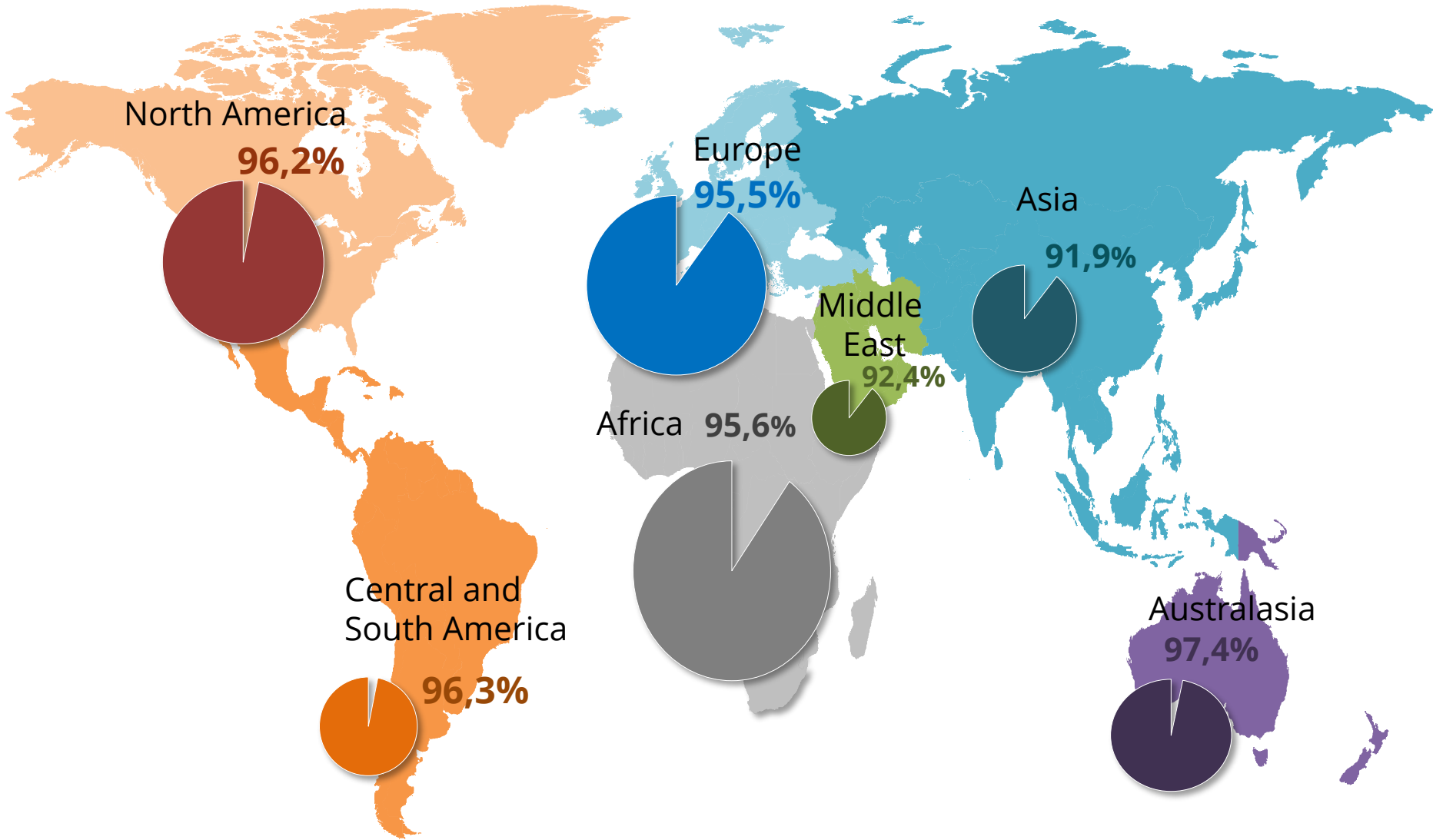


**95,5%** of inbound tourists were in South Africa for holidays

# Main purpose of travel

overseas

## Overseas tourists main purpose of travel: 2015 - Holiday



# Domestic tourism survey



# Domestic tourism survey

- Provides information on domestic tourism
- Annual household survey covering a sample of 32 000 households
- Data are gathered on day and overnight trips
- Latest report available: 2015
- Can be used to answer the following questions:
  - When do domestic tourists travel?
  - Where do domestic tourists travel to?
  - Main reason for travel?
  - Modes of transport used?
  - Types of accommodation used?



# Information Gathered



Demographic information

Day trips taken inside South Africa

Overnight trips taken inside South Africa

Main destinations

Reason for travelling

Mode of transport used

Living Standard Measure

# Comparison of Stats SA and SA Tourism



**Recall period**



Monthly



Annual

**Content**

Overnight, day trips  
and LSM

Overnight and  
day trips

**Reporting**

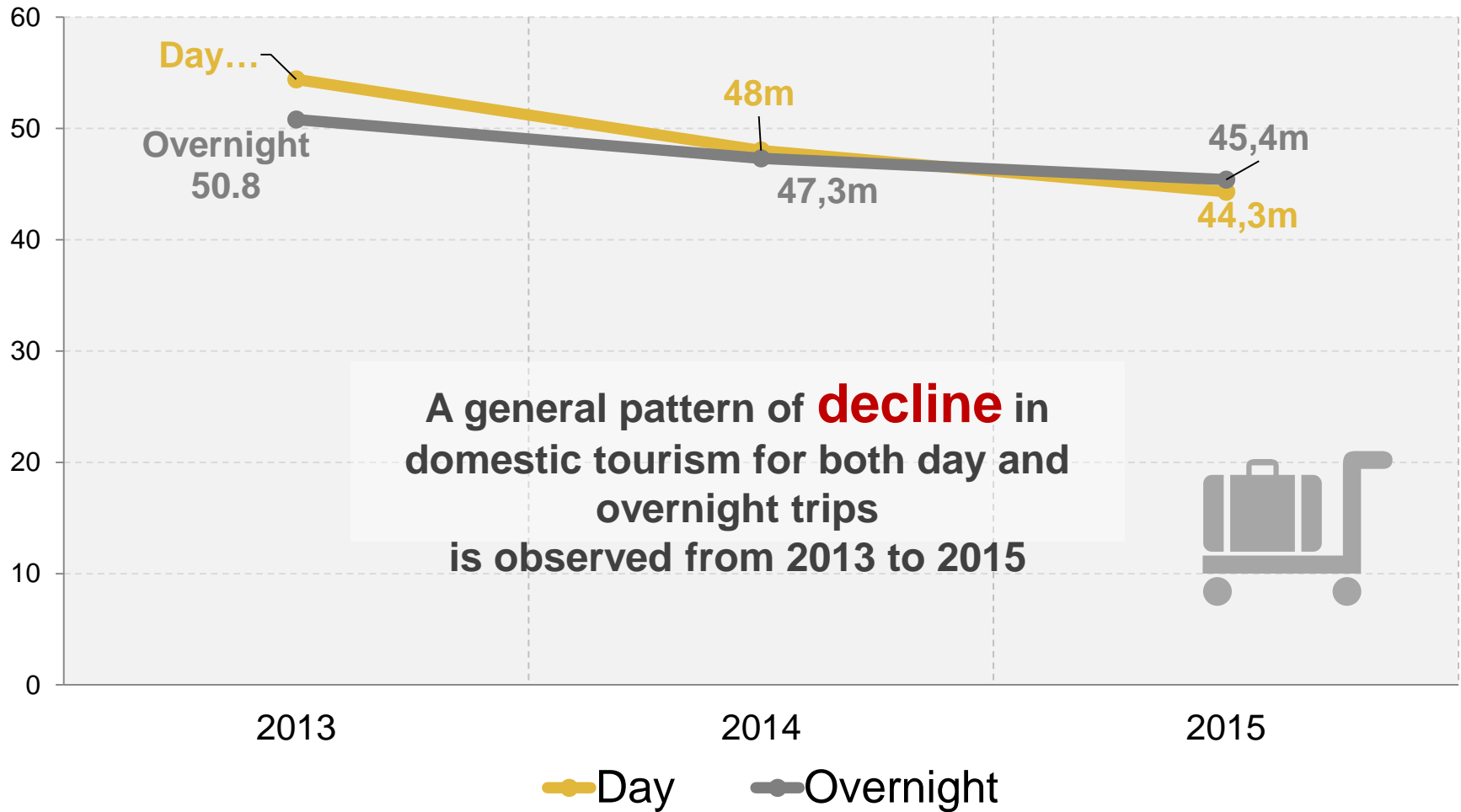


Final report  
in 2016/17



From 2017/18  
onwards

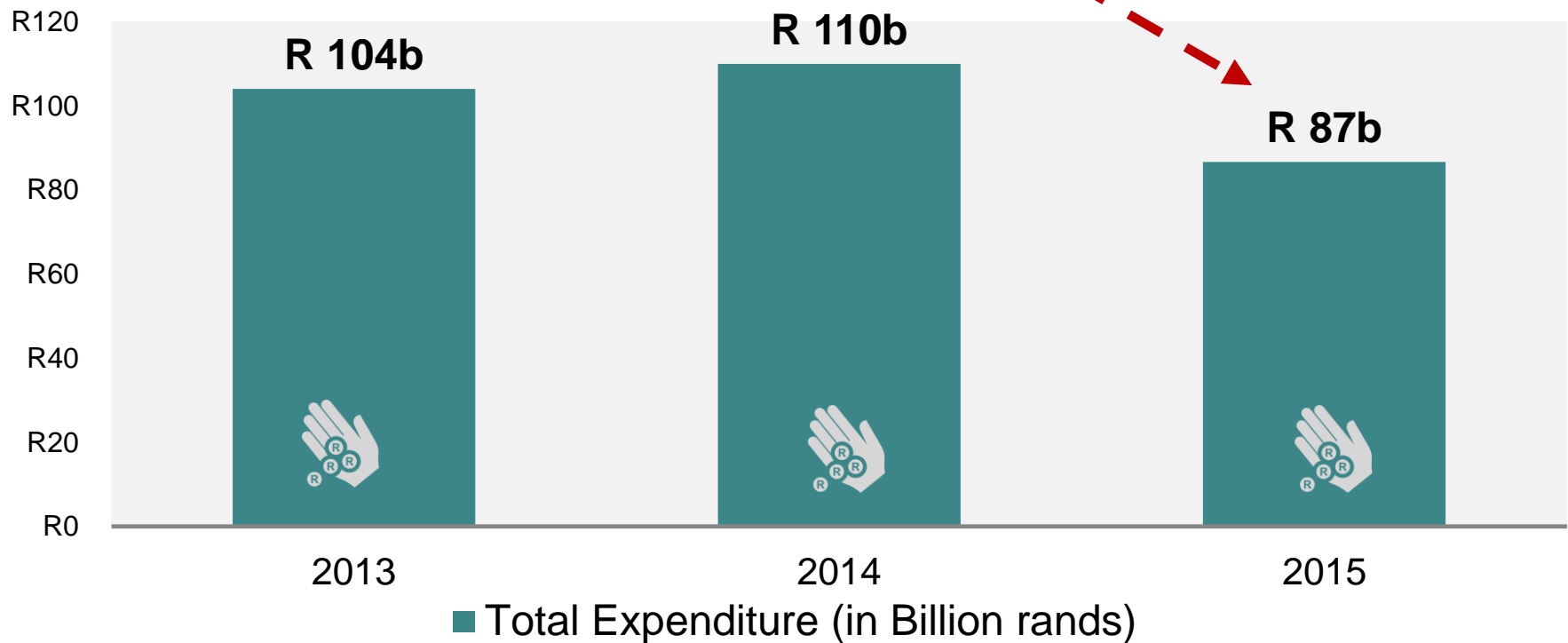
# Total number of trips (million), 2013 – 2015



# Total expenditure (in Billion rand), 2013 - 2015

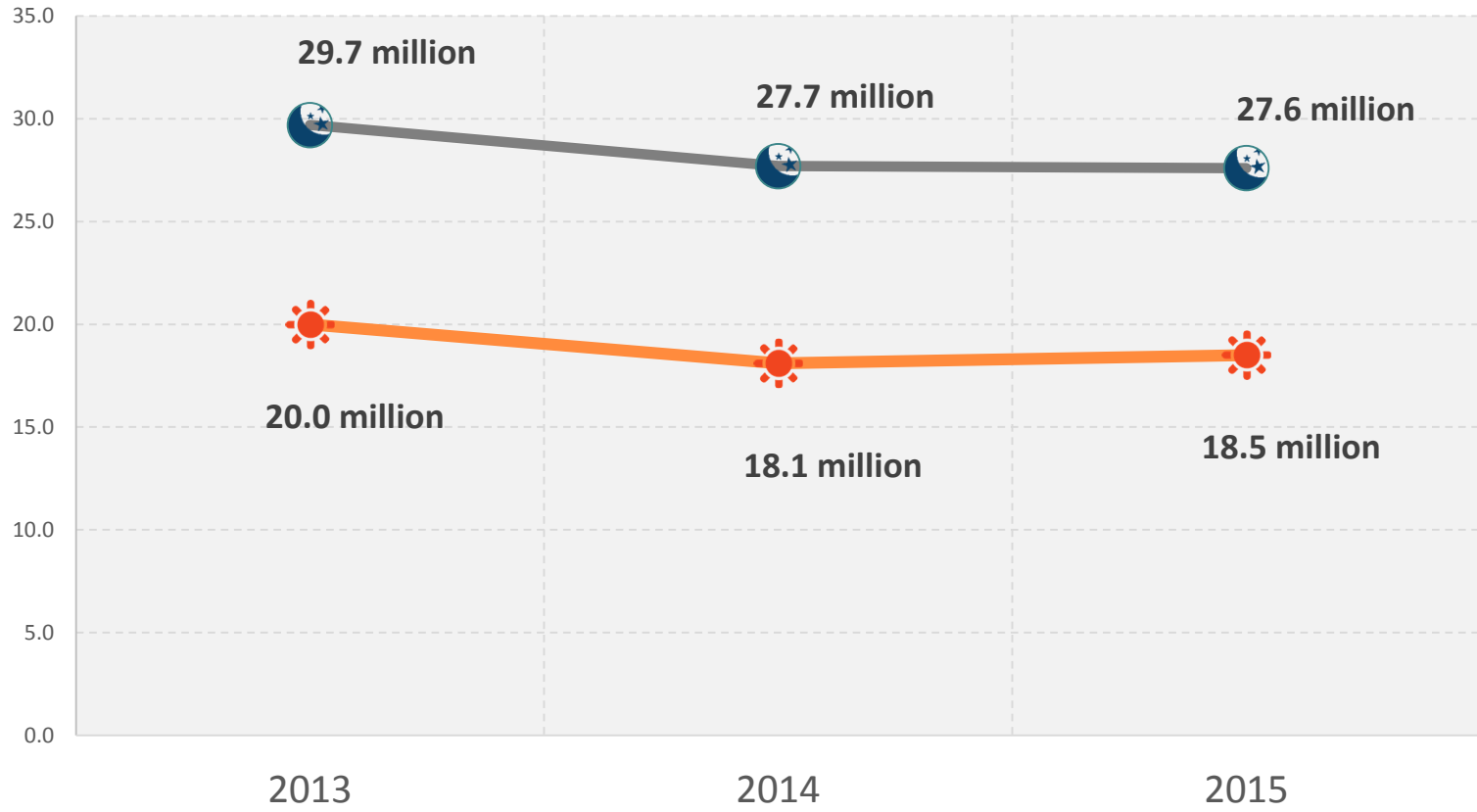
Total expenditure on domestic day and overnight trips shows a decline of

**R22 billion** between 2014 and 2015



# Most recent day and overnight trips, 2013 – 2015

Most recent trips has seen a decline in overnight trips between 2014 and 2015



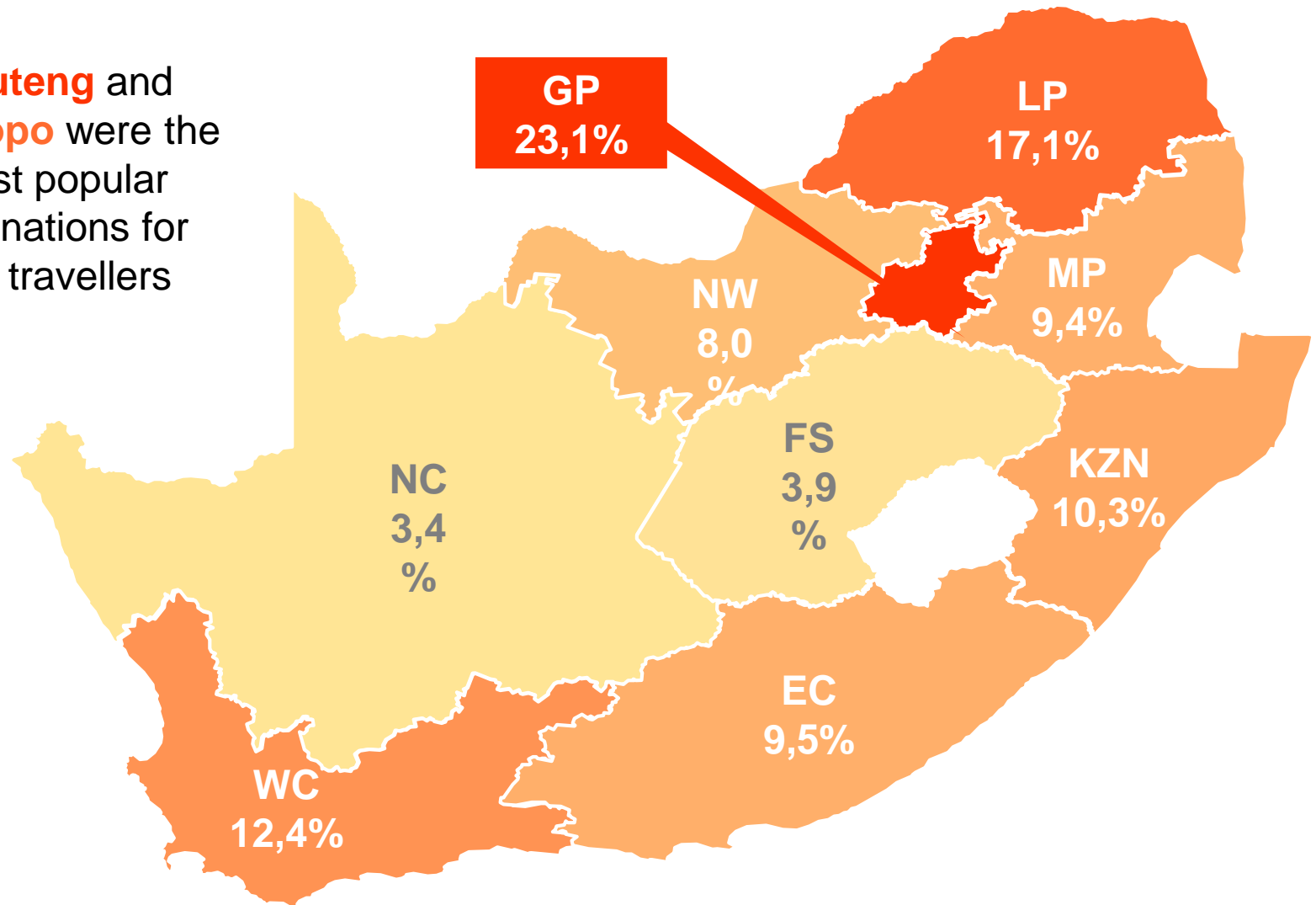
**Day trip**  
A trip outside of the usual environment, where one leaves and returns within the same day (i.e. do not stay overnight).



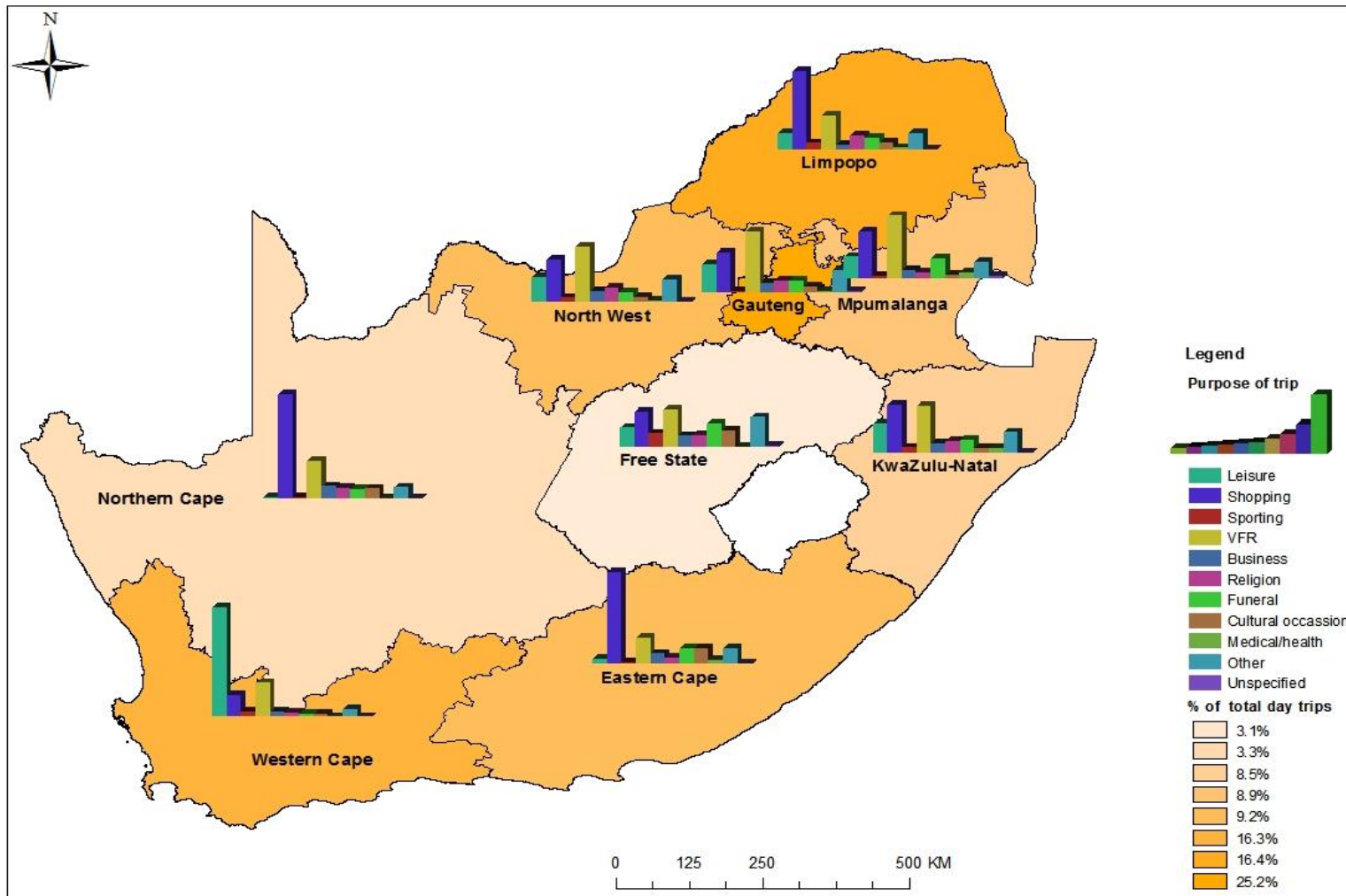
**Overnight trip**  
A trip outside of one's usual environment where one night or more is spent away from the usual environment.

# Percentage of most recent day trips by province of destination, 2015

**Gauteng** and **Limpopo** were the most popular destinations for day travellers



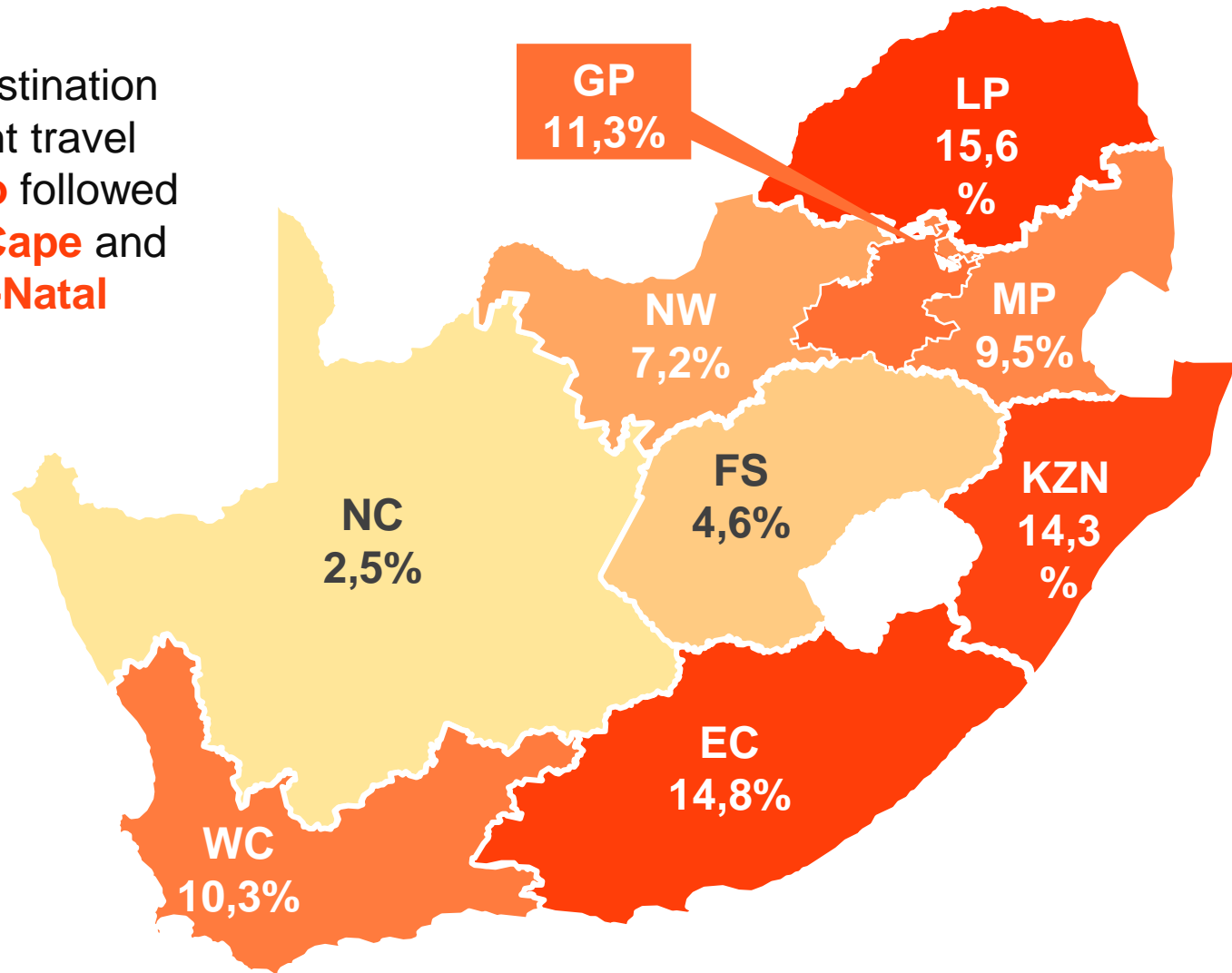
# Percentage distribution of main purpose of most recent day trips by province of destination, January–December, 2015



Day  
travellers  
visited  
KZN to  
visit  
friend  
and  
relatives

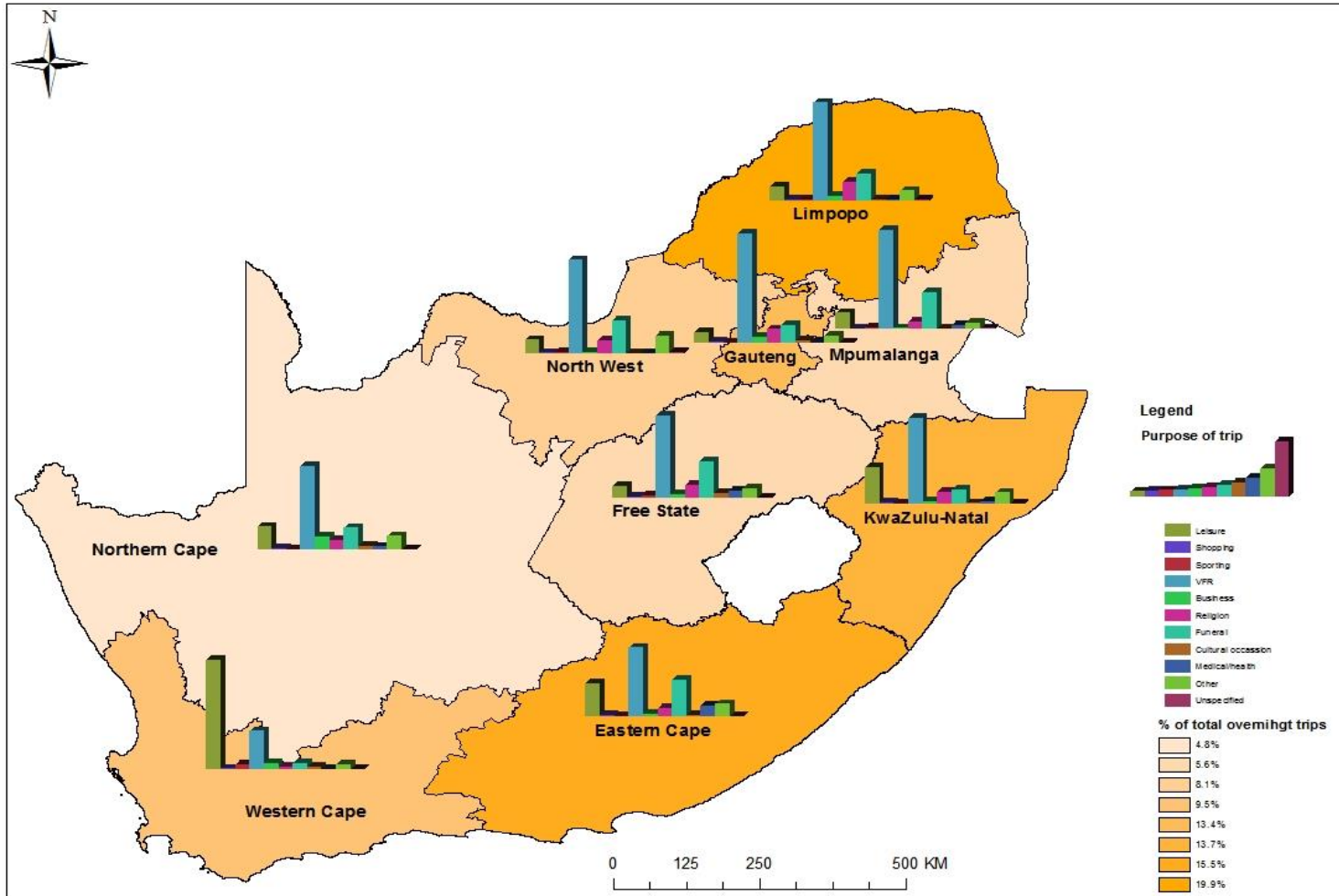
# Percentage of most recent overnight trip by province of destination, 2015

The main destination for overnight travel was **Limpopo** followed by **Eastern Cape** and **KwaZulu-Natal**





# Percentage distribution of main purpose of most recent overnight trips by province of destination, January–December, 2015



Tourists travelled to KZN for visiting friends and relatives and leisure



# Mode of Transport

# Mode of transport by most recent **overnight trip**, 2013 - 2015



CAR



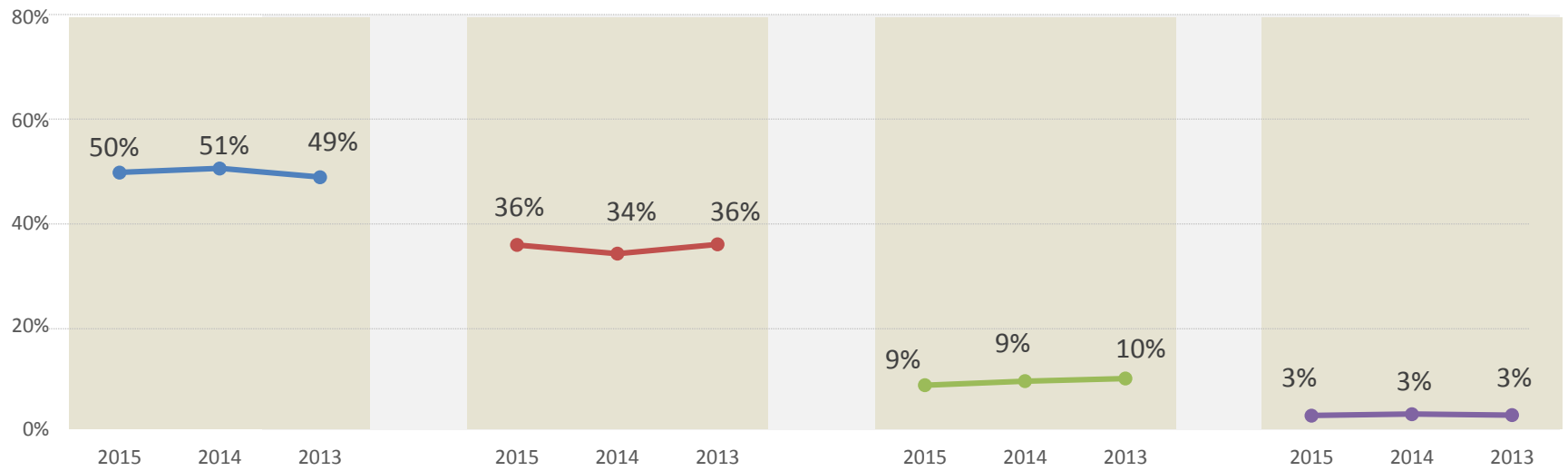
TAXI



BUS



AIRPLANE



Cars remain the main mode of transport used for overnight trips. Taxis were the second most used mode of transport for overnight trips.

## Percentage distribution of main mode of transport used on most recent person day trips, January–December, 2015

Province of destination	Air	Bus	Car	Taxi
Western Cape	65,0	12,8	17,8	1,5
Eastern Cape	3,5	7,8	6,5	15,7
Northern Cape	-	0,5	3,5	3,4
Free State	7,7	5,4	4,2	2,8
KwaZulu-Natal	12,5	11,4	10,3	10,2
North West	-	4,9	8,4	7,7
Gauteng	11,3	22,9	24,0	21,7
Mpumalanga	-	9,1	10,4	7,9
Limpopo	-	24,0	12,1	26,5
Unspecified	-	1,2	2,8	2,6
<b>South Africa</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>

Day travellers used aircrafts, buses, cars and taxis to reach KZN

## Percentage distribution of main mode of transport used on most recent person overnight trips, January–December, 2015

Province of destination	Air	Bus	Car	Taxi	
	2015	2015	2015	2013	2015
Western Cape	30,4	4,2	16,5	1,3	1,9
Eastern Cape	19,9	18,4	11,5	13,9	18,2
Northern Cape	1,1	1,0	3,1	1,7	1,6
Free State	0,5	3,5	4,9	5,2	4,7
KwaZulu-Natal	9,3	13,7	13,0	18,8	16,8
North West	1,3	3,5	7,3	8,1	8,0
Gauteng	18,6	12,7	10	13,0	12,4
Mpumalanga	0,2	6,5	9,7	9,6	9,6
Limpopo	1,0	24,8	15,8	17,8	18,9
Unspecified	17,7	11,7	8,2	10,6	7,7
<b>South Africa</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>	<b>100,0</b>

Cars, buses and taxis were mostly used by tourists to travel to Limpopo, KwaZulu-Natal, Western Cape and Gauteng.



# Accommodation

# Accommodation used on most recent **overnight trip**, 2015

■ Stayed with friends and relatives

■ Self Catering

■ Other

■ Hotel

■ Caravan Park

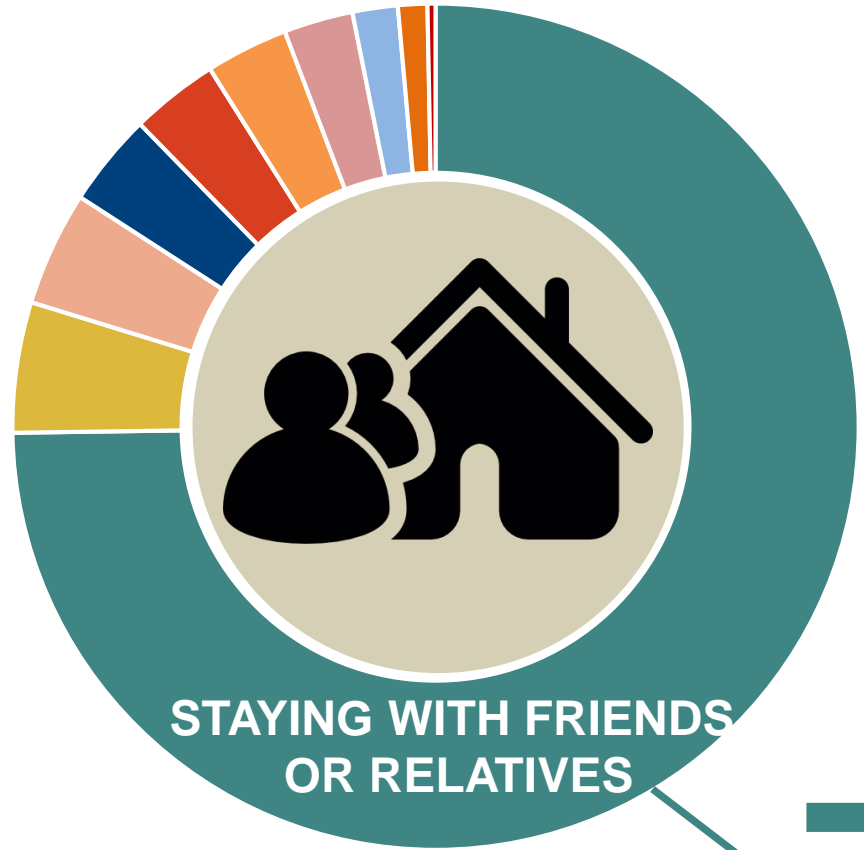
■ Holiday Home

■ Guest House

■ Lodge

■ Bed and Breakfast

■ Hostel/Back Packers



**STAYING WITH FRIENDS  
OR RELATIVES**

**74%**

Most tourists made use of **unpaid** accommodation when undertaking an overnight trip by **staying with friends or relatives**

# Tourist accommodation

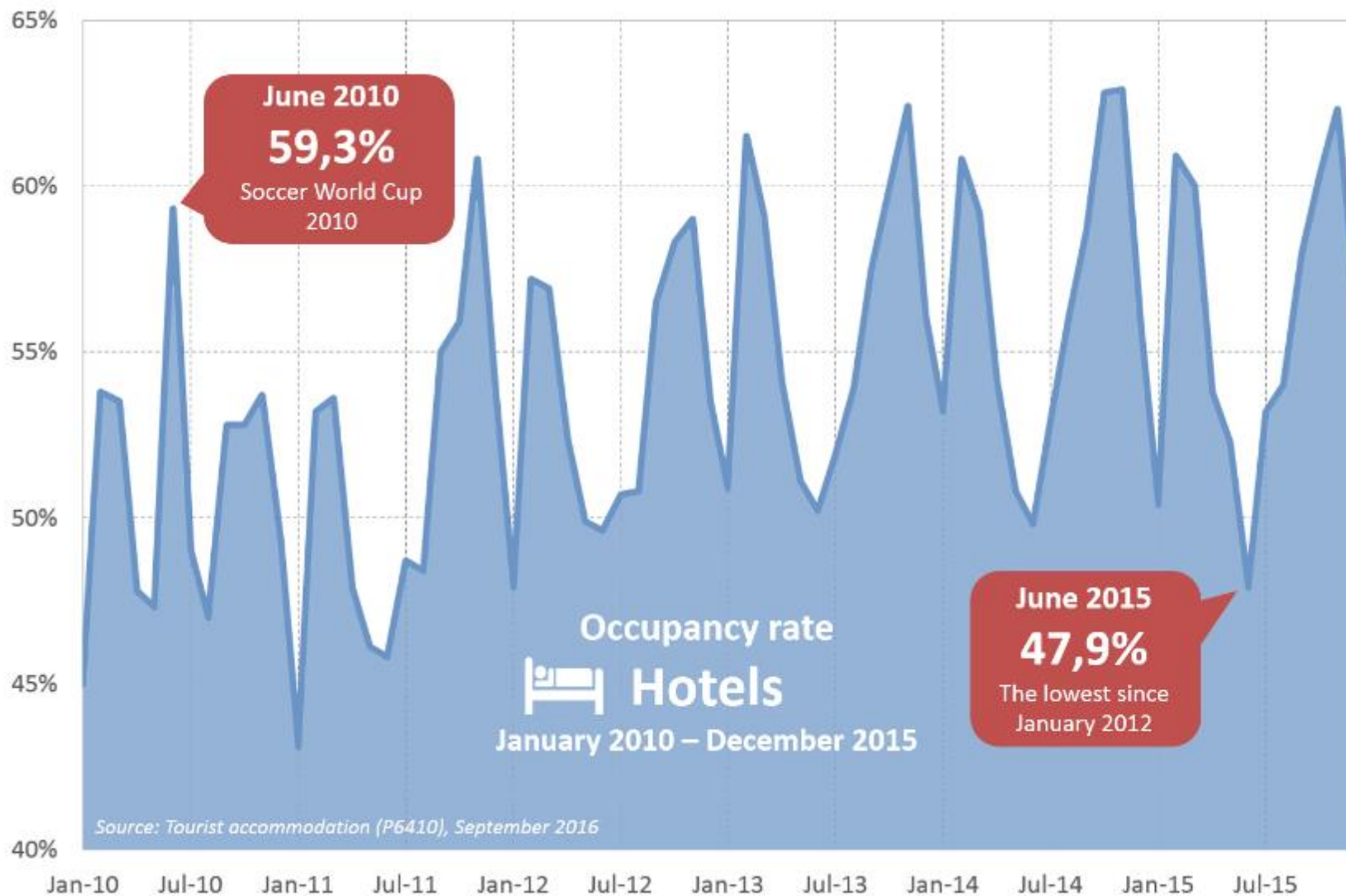




# Tourist accommodation

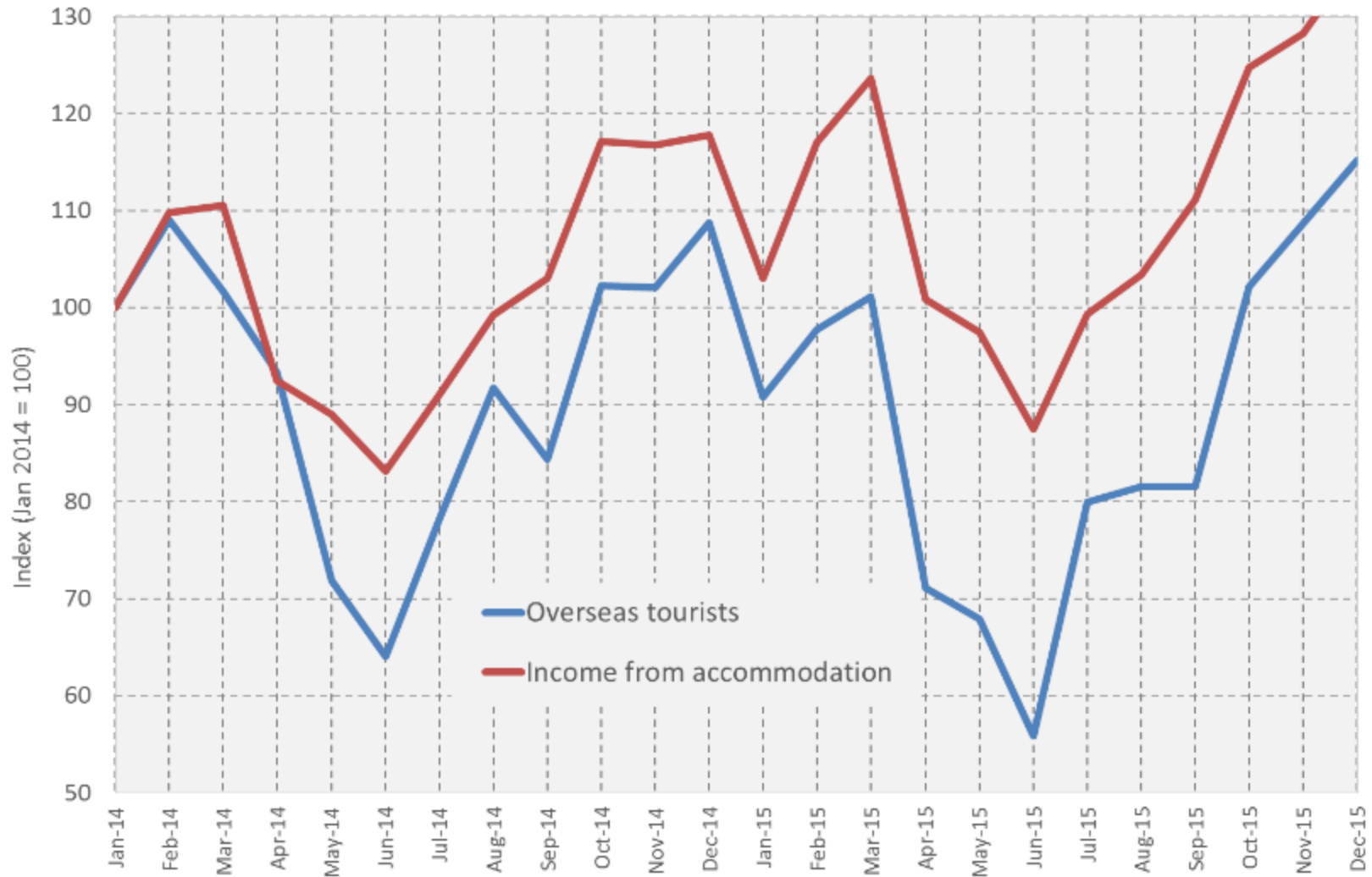
- Provides information on the number of stay units available, stay unit nights sold, and income earned in the short-stay accommodation industry
- Monthly survey covering a sample of public and private enterprises
- Sample obtained from the Business Frame
- Released approximately 8 weeks after the reference month
- Can be used to answer the following questions:
  - How much income does the industry earn?
  - How do occupancy rates, for various types of accommodation, change during the year?

# Hotel occupancy rate over time



# Accommodation income and overseas tourists

Indices for volume of overseas tourists vs income earned by hotels from accommodation



Sources: (1) Overseas tourists: Tourism and Migration (P0351) (2) Income from accommodation: Tourist accommodation (P6410)

# Provincial Data

# Current limitations

- The data requirements for a provincial TSA differ when compared to a national TSA.
- Tourism is not uniform throughout the country (unevenly distributed)
- Lack of a strong tourism statistics at a provincial level
- TSA data sources only available at a national level
- No Balance of Payments data at a provincial level
- No provincial Supply and Use tables!



Thank  
you!