Tourism in South Africa
A statistical overview
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

2013: R103 349m, 2.9%
2014: R114 419 m, 3.0%
2015: R118 928 m, 3.0%
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
Trade balance with the rest of the world
R million
2005-2015

Average annual growth rate 5.8%
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

<table>
<thead>
<tr>
<th>Year</th>
<th>RSA tourism</th>
<th>Domestic</th>
<th>Inbound</th>
<th>Outbound</th>
<th>Trade balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
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<td>2014</td>
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<tr>
<td>2015</td>
<td>R249 691m</td>
<td>R140 931m</td>
<td>R108 760m</td>
<td>R72 712m</td>
<td>R36 048m</td>
</tr>
</tbody>
</table>

Inbound
Non-resident visitors

Domestic
resident visitors
Tourism contribution to value added
Tourism direct gross value added 2015

- Road transport
- Accommodation
- Air transport
- Trade of tourism connected goods
- Travel agencies
- Food and beverages
- Sports and recreation
- Transport equipment rental
- Railway transport
- Cultural industry
- Water transport
- Other non-tourism industries
Industry comparisons
Industry comparison: contributions to value added and employment: 2015

- Community: Value added 22.9%, Employment 30.7%
- Trade: Value added 15.0%, Employment 20.1%
- Finance: Value added 14.0%, Employment 20.6%
- Manufacturing: Value added 13.2%, Employment 11.2%
- Construction: Value added 4.0%, Employment 8.9%
- Transport: Value added 5.7%, Employment 10.3%
- Agriculture: Value added 2.4%, Employment 5.6%
- Tourism: Value added 3.1%, Employment 4.5%
- Mining: Value added 2.9%, Employment 8.0%
- Utilities: Value added 0.8%, Employment 3.7%
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

- **Highest**: December and January
- **Lowest**: June, May, February
- **Exception**: June 2010
How long do tourists stay in the country?
Average number of **days** by month **2015**

<table>
<thead>
<tr>
<th>Month</th>
<th>Average Number of Days</th>
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<tbody>
<tr>
<td>Jan</td>
<td>6</td>
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<td>Feb</td>
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<td>Mar</td>
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<td>Apr</td>
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<td>May</td>
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<td>Jun</td>
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<td>Jul</td>
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<td>Aug</td>
<td>6</td>
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<td>Sep</td>
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<td>Oct</td>
<td>6</td>
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<td>Nov</td>
<td>6</td>
</tr>
<tr>
<td>Dec</td>
<td>6</td>
</tr>
</tbody>
</table>

** Overseas **

Average 6 days
How long do tourists stay in the country?
Average number of **days** by month 2015

- Jan: 5 days
- Feb: 5 days
- Mar: 5 days
- Apr: 5 days
- May: 5 days
- Jun: 4 days
- Jul: 5 days
- Aug: 5 days
- Sep: 5 days
- Oct: 5 days
- Nov: 4 days
- Dec: 5 days

Other African countries

Average: 5 days

Stats SA

The South Africa I know, the home I understand
How long do tourists stay in the country?
Average number of **days** by month **2015**

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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<tbody>
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</tbody>
</table>

SADC

**Average 3 days**
Average number of days tourists spend: 3 days
Where do tourists come from?
Overseas tourists from 7 leading countries: 2015

United Kingdom 407,486
United States 297,226
China 84,691
Australia 99,205
Germany 256,646
France 128,438
The Netherlands 121,883
Where do tourists come from?
Overseas tourists from 7 leading SADC countries: 2015

Tourists from 7 leading other African countries

Nigeria  59 002
Kenya     27 077
Ghana     16 184
Uganda    11 561
Gabon     7 730
Egypt     7 210
Ethiopia  7 210

Source: Statistics South Africa
Main purpose of travel

95.5% of inbound tourists were in South Africa for holidays

- 95.5% Holiday
- 3.7% Business
- 0.8% Study
Main purpose of travel
Overseas tourists main purpose of travel: 2015 - Holiday

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>96.2%</td>
</tr>
<tr>
<td>Central and South America</td>
<td>96.3%</td>
</tr>
<tr>
<td>Europe</td>
<td>95.5%</td>
</tr>
<tr>
<td>Middle East</td>
<td>92.4%</td>
</tr>
<tr>
<td>Asia</td>
<td>91.9%</td>
</tr>
<tr>
<td>Africa</td>
<td>95.6%</td>
</tr>
<tr>
<td>Australasia</td>
<td>97.4%</td>
</tr>
</tbody>
</table>
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

DOMESTIC TOURISM SURVEY 2015
Comparison of Stats SA and SA Tourism

Recall period

Content

Reporting

Monthly

Overnight, day trips and LSM

Final report in 2016/17

Annual

Overnight and day trips

From 2017/18 onwards
A general pattern of **decline** in domestic tourism for both day and overnight trips is observed from 2013 to 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.
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
The main destination for overnight travel was Limpopo followed by Eastern Cape and KwaZulu-Natal.
Tourists travelled to KZN for visiting friends and relatives and leisure.
Mode of transport by most recent overnight trip, 2013 - 2015

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

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

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

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Western Cape</td>
<td>30,4</td>
<td>4,2</td>
<td>16,5</td>
<td>1,3</td>
<td>1,9</td>
</tr>
<tr>
<td>Eastern Cape</td>
<td>19,9</td>
<td>18,4</td>
<td>11,5</td>
<td>13,9</td>
<td>18,2</td>
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<tr>
<td>Northern Cape</td>
<td>1,1</td>
<td>1,0</td>
<td>3,1</td>
<td>1,7</td>
<td>1,6</td>
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<tr>
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<td>4,9</td>
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<td>16,8</td>
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<td>North West</td>
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</tr>
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<td>Mpumalanga</td>
<td>0,2</td>
<td>6,5</td>
<td>9,7</td>
<td>9,6</td>
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<td>Limpopo</td>
<td>1,0</td>
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<td>17,8</td>
<td>18,9</td>
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<td>8,2</td>
<td>10,6</td>
<td>7,7</td>
</tr>
<tr>
<td>South Africa</td>
<td>100,0</td>
<td>100,0</td>
<td>100,0</td>
<td>100,0</td>
<td>100,0</td>
</tr>
</tbody>
</table>

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

- June 2010: 59.3% (Soccer World Cup 2010)
- June 2015: 47.9% (The lowest since January 2012)

Source: Tourist accommodation (P6410), September 2016

Occupancy rate
Hotels
January 2010 – December 2015

STATS SA
STATISTICS SOUTH AFRICA

THE SOUTH AFRICA I KNOW, THE HOME I UNDERSTAND
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!