

National Accounts



Satellite Accounts

Tourism Satellite Account for South Africa, final 2011 and
provisional 2012 and 2013

Report No.: 04-05-07
March 2015



**Statistics
South Africa**



The South Africa I know, the home I understand

Tourism Satellite Account for South Africa, final 2011 and provisional 2012 and 2013

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Report number: 04-05-07
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Abbreviations

AFS	Annual Financial Statistics
AsgiSA	Accelerated and Shared Growth Initiative for South Africa
BoP	Balance of Payments
CPC	Central Product Classification
EAS	Economic Activity Survey
GDP	Gross domestic product
GHS	General Household Survey
GVA	Gross value added
GDVATI	Gross direct value added of the tourism industries
IES	Income and Expenditure Survey
ISIC	International Standard Industrial Classification of all Economic Activities
LFS	Labour Force Survey
LSS	Large Sample Survey
QLFS	Quarterly Labour Force Survey
SARB	South African Reserve Bank
SAT	South African Tourism
SIC	Standard Industrial Classification of all Economic Activities
SICTA	Standard International Classification of Tourism Activities
SNA	System of National Accounts
Stats SA	Statistics South Africa
STS	System of Tourism Statistics
SU-tables	Supply and Use Tables
TDGDP	Tourism direct gross domestic product
TDGVA	Tourism direct gross value added
TFDS	Tourism foreign direct spend
TSA	Tourism Satellite Account
TSA: RMF	Tourism Satellite Account: Recommended Methodological Framework
UN	United Nations
UNSD	United Nations Statistical Division
UNWTO	United Nations World Tourism Organisation
VA	Value added
VAT	Value added tax

Preface

The Tourism Satellite Account (TSA), final 2011 and provisional 2012 and 2013 covers updated and new provisional figures for the reference years 2012 and 2013 as well as the final results for 2011. It provides an overview of the role that tourism plays in South Africa and provides information on tourism's contribution to the South African economy both in terms of expenditure and employment. The TSA for 2011, 2012 and 2013 was compiled using the new rebased and benchmarked National Accounts (according to the 2008 System of National Accounts) that was released in November 2014. This constitutes a break in time series from the previously published TSA's (2005 to 2012). Stats SA will compile a new full time series for the TSA (2005 to 2014) to be released in March 2016.

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

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March 2015

Key Findings

Key findings of the Tourism Satellite Account for South Africa for 2011 to 2013 are*:

	2011(f)	2012(p)	2013(p)
Inbound tourism expenditure (R million)	71 747	85 423	94 183
Outbound tourism expenditure (R million)	60 545	58 588	62 596
Tourism trade balance with the rest of the world (R million)	11 202	26 835	31 587
Domestic tourism expenditure (R million)	102 877	114 022	124 687
Internal tourism expenditure (R million)	174 624	199 445	218 870
Tourism direct gross value added (TDGVA) (R million)	77 393	86 361	95 607
Tourism direct gross value added (TDGVA) (%)	2,8	2,9	3,0
Tourism direct gross domestic product (TDGDP) (R million)	83 991	93 465	103 557
Tourism direct gross domestic product (TDGDP) (%)	2,8	2,9	2,9
Persons directly engaged in producing goods and services purchased by visitors (nr)	623 299	645 755	655 609
Persons directly engaged in producing goods and services purchased by visitors (%)	4,4	4,5	4,4

(f) Final

(p) Preliminary

*Please note that 2011, 2012 and 2013 TSA data was compiled using the new rebased and benchmarked National Accounts data that was released in November 2014

Tourism direct gross domestic product was R83 991 million (or 2,8% of total gross domestic product) for 2011, R93 465 million (or 2,9% of total gross domestic product) in 2012, and R103 557 million (or 2,9% of total gross domestic product) for 2013.

The year 2013 saw 14 317 908 non-resident visitors to South Africa compared with 13 069 034 non-resident visitors for 2012 and 12 097 490 non-resident visitors for 2011.

There were 623 299 persons (or 4,4% of total employment) directly engaged in producing goods and services purchased by visitors in 2011, 645 755 (or 4,5% of total employment) in 2012 and 655 609 (or 4,4 % of total employment) in 2013.

Inbound tourism expenditure totalling R71 747 million was recorded in 2011. The main expenditure items were 'non-specific products' (22,4%), 'accommodation for visitors' (15,7%) and 'road passenger transport services' (13,6%). Inbound tourism expenditure totalling R94 183 million was recorded in 2013. The main expenditure items were 'non-specific products' (27,0%), 'connected products' (14,6%), 'accommodation for visitors' (14,2%) and 'road passenger transport services' (11,9%).

Domestic tourism expenditure totalling R102 877 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2011. The main expenditure items were 'road passenger transport services' (30,5%), 'non-specific products' (20,0%), 'accommodation for visitors' (13,5%) and 'air passenger transport services' (12,9%). Domestic tourism expenditure totalling R124 687 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2013. The main expenditure items were 'road passenger transport services' (28,7%), 'non-specific products' (19,4%), 'accommodation for visitors' (14,6%) and 'air passenger transport services' (13,6%).

The total internal tourism consumption in cash for South Africa in 2011 was R174 624 million (inbound tourism consumption R71 747 million [41,1%] and domestic tourism consumption R102 877 million [58,9%]). The main expenditure items for internal tourism were 'road passenger transport services' (23,5%), 'non-specific products' (21,0%), 'accommodation for visitors' (14,4%) and 'air passenger transport services' (12,7%).

The total internal tourism consumption in cash for South Africa in 2013 was R218 870 million (inbound tourism consumption R94 183 million [43,0%] and domestic tourism consumption R124 687 million [57,0%]). The main expenditure items for internal tourism were 'non-specific products' (22,7%), 'road passenger transport services' (21,5%), 'accommodation for visitors' (14,4%) and 'air passenger transport services' (12,8%).

Chapter 1: Introduction

The United Nations World Tourism Organisation (UNWTO) defines tourism as 'the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited'. Tourism has become an important economic and social activity in the national and global economy during the last decades. However, statistical information on the nature, progress and consequences of tourism in South Africa is mainly based on arrivals and overnight stay statistics, Balance of Payments (BoP) information and South African Tourism (SAT) surveys, which do not grasp the whole economic phenomenon of tourism. Consequently, government, businesses and citizens may not receive accurate information that is necessary for effective public policies and efficient business operations.

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

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

1.1 The importance of a Tourism Satellite Account

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

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

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

1.2 Relationships of the Tourism Satellite Account with the System of National Accounts

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

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

- A statistical instrument used to measure the size of the tourism sector's contribution to the economy of a country according to international standards of concepts, classifications and definitions which will allow for valid comparisons with other industries and, eventually, between individual countries and between groups of countries; and
- Used to analyse all aspects of demand for goods and services which can be associated with tourism within the economy, to observe the operational interface with the supply of such goods and services within the same economy of reference, and to describe how this supply interacts with other economic activities².

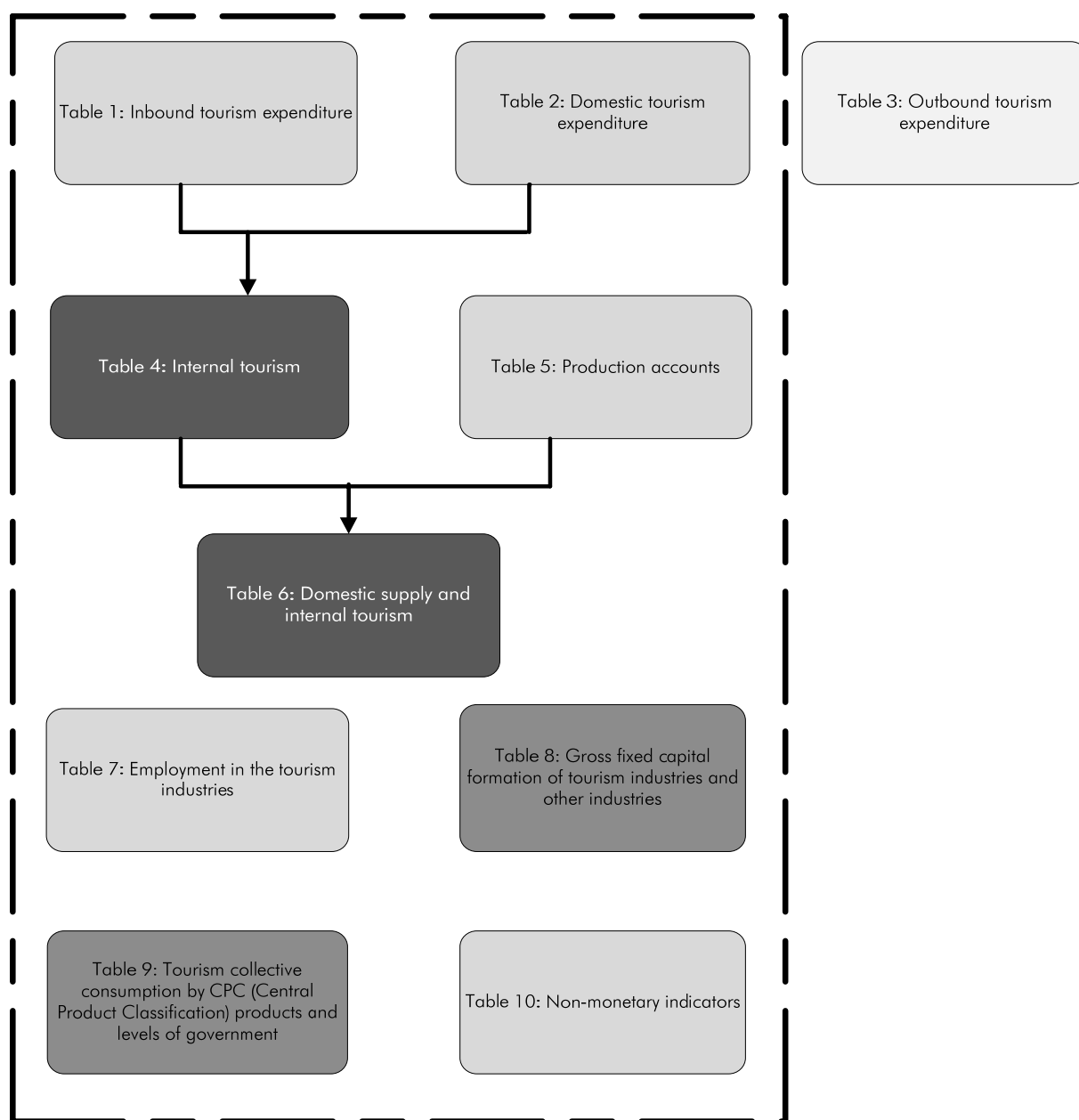
The fundamental structure of a TSA is based on the general relationship existing within an economy between the demand for goods and services generated by tourism on the one hand, and their supply on the other hand, and as such provides a framework for policy analysis of issues related to tourism economics,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

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

² TSA: RMF, 2008

provide a measure of the importance of tourism in terms of gross domestic product (GDP), expenditures and employment which will be comparable with similar measures from the SNA for the overall South African economy (it also allows a comparison with other industries in terms of the above-mentioned variables). The TSA for South Africa, final 2011 and provisional 2012 to 2013 provides a coherent framework from within which to integrate and analyse economic statistics related to tourism activity both from the supply and demand side. The South African TSA follows the international guidelines as prescribed by the UNWTO. Figure 1 shows the 10 tables of the TSA.

Figure 1: The 10 tables of a Tourism Satellite Account



A background to the concepts and methodology used in the compilation of the TSA for South Africa can be found in the discussion document 'Draft Tourism Satellite Account for South Africa, 2005 (Discussion document No. D0405.7)' on the Stats SA website (www.statssa.gov.za) as well as from the Printing and Distribution section at Stats SA (distribution@statssa.gov.za or 012 310 8044/8161). TSA Tables 1 to 7 for 2011 to 2013, in Microsoft Excel spreadsheets, are released with the March 2015 report on the TSA for South Africa, downloadable from www.statssa.gov.za.

Chapter 2: Data sources

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

2.1 Data sources used for compilation of the Tourism Satellite Account

The Supply and Use Tables (SU-tables) of the SNA are the main source of data for the compilation of Table 5 and Table 6 of the TSA (the confrontation between supply and internal tourism demand). The recommended valuation principles are the same as those of the SNA, namely production should be valued at basic prices and consumption and use at purchasers' prices³.

Several main data sources were used for the compilation of the TSA for South Africa. Stats SA is the official provider of statistics used for policy-making in South Africa. These statistics are obtained from various sources – from annual household surveys to annual, quarterly or monthly industry surveys as well as administrative data from external sources such as the South African Reserve Bank (SARB) and SAT.

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

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

Demand-side data				
Survey/administrative data	Conducted in the past?	Latest publication ⁴	Frequency	Coverage
Tourism and migration	Yes	August 2014 (reference period – March 2014)	Monthly and annually	Movement control system from DHA
Income and Expenditure Survey (IES)	Yes	November 2012 (reference period – 2010/2011)	Every 5 years	30 000 households
Domestic Tourism Survey (DTS)	Yes	February 2015 (2013)	Annually	32 000 households
SU-tables	Yes	Reference period 2013 (10x10) Reference period 2013 (64x104) Reference period 2005 (171x104)	Annually Annually Periodically	Entire economy

³ TSA: RMF

⁴ Correct on 20 February 2015.

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 2014 (reference period – 2012/2013)	Annually	General government
Tourist accommodation survey	Yes	January 2015 (reference period – November 2014)	Monthly	1 000 enterprises sampled
Survey of food and beverages	Yes	January 2015 (reference period – November 2014)	Monthly	900 enterprises sampled
Large sample survey (LSS) on accommodation	Yes	November 2014 (reference period – 2012)	Every 3 years	2 000 enterprises sampled
LSS on personal services	Yes	December 2009 (reference period – 2008)	Every 3 years	4 277 enterprises sampled
LSS on the transport industry	Yes	November 2014 (reference period 2013)	Every 3 years	8 600 enterprises sampled
LSS on real estate and business services	Yes	November 2011 (reference period 2010)	Every 3 years	8 000 enterprises sampled
LSS on wholesale and retail trade	Yes	November 2013 (reference period – 2012)	Every 3 years	Wholesale: 3 000 enterprises sampled Retail: 3 009 enterprises sampled
Annual Financial Statistics (AFS) ⁵	Yes	November 2014 (reference period – 2013)	Annually	13 121 enterprises sampled
SU-tables	Yes	Reference period 2013 (10x10) Reference period 2013 (64x104) Reference period 2005 (171x104)	Annually Annually Periodically	Entire economy

Source: Statistics South Africa

In addition to the data sources compiled by Stats SA, other data sources used include SARB Balance of Payments (BoP)⁶ for South Africa and the South African Tourism (SAT) domestic and departure surveys. Table 2 provides a brief description of the SAT domestic and departure surveys.

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

⁶ Compiled quarterly with a lag of a quarter.

Table 2: Data sources used for compilation of the Tourism Satellite Account for South Africa at South African Tourism

Survey/administrative data	Frequency	Last reference year	Coverage ^{7,8}
Departure survey	Monthly	2013	57 600 people
Domestic survey	Monthly	2013	15 600 adults

Source: SAT

2.1.1 Supply and Use Tables

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

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

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

⁷ Annual coverage

⁸ Number of individuals covered

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

It is important to note that there 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 2011 and provisional 2012 and 2013

This chapter reviews the results of the TSA for South Africa for the reference years 2011 (final) as well as 2012 and 2013 (provisional).

Tourism is a fast-growing industry globally which is recognised by the South African government for the role it can play in economic growth and poverty reduction. Tourism plays a significant role in influencing economies' generation of value added, employment, personal income and government income⁹. The importance of tourism to both developing and developed nations has created a need to measure its economic and social impact.

3.1 Tourism expenditure

Tourism expenditure refers to the acquisition of goods and services by visitors or by others for their benefit through a monetary transaction for the direct satisfaction of their wants and needs during their stay at their destination¹⁰. Tables 3a to 3c show tourism expenditure by product for South Africa, for the reference years 2011 to 2013.

Tourism product ratio

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

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

1. A *tourism-characteristic product* is a product that will cease to exist in meaningful quantity, or for which the level of consumption would be significantly reduced, in the absence of visitors. A product is classified as a tourism-characteristic product if at least 25 per cent of its production is purchased by visitors (that is, a tourism-characteristic product has a tourism product ratio of greater than or equal to 0,25).
2. A *tourism-related product* is distinct from a tourism-characteristic product in that visitors consume a smaller proportion of the total supply of the product. For a product to be classified as a tourism-related product, visitors must purchase more than 0 per cent and less than 25 per cent of its production (that is, a tourism-related product has a tourism product ratio that is greater than 0 and less than 0,25).
3. A *non-tourism-related product* is a product that is a non-tourism-specific¹¹ product.

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

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

⁹ TSA: RMF

¹⁰ TSA: RMF

¹¹ A tourism-specific product is either a tourism-characteristic product or a tourism-related product.

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

Product	Domestic demand	International demand (exports)	Total demand	Total domestic supply	Tourism product ratio*	Tourism spending abroad (imports)
	(1)	(2)	(3) = (1)+(2)	(4)	(5) = (3)/(4)	(6)
	R million				Percentage	R million
Characteristic products	71 564	45 901	117 465	231 344	50,8	-
Accommodation services	13 928	11 246	25 174	26 472	95,1	-
Restaurants and similar	4 252	7 752	12 004	31 896	37,6	-
Passenger transport services	46 938	20 088	67 026	143 692	46,6	-
<i>Railway passenger transportation services</i>	242	121	363	5 171	7,0	-
<i>Road passenger transportation services</i>	31 338	9 726	41 064	110 478	37,2	-
<i>Water passenger transportation services</i>	7	2	9	17	56,0	-
<i>Air passenger transportation services</i>	13 247	8 976	22 222	23 074	96,3	-
<i>Transport equipment rental</i>	2 105	1 263	3 367	4 952	68,0	-
Travel agencies and similar services	4 614	1 938	6 553	6 683	98,0	-
Cultural services	118	128	246	1 130	21,8	-
Sports and recreational services	1 712	4 750	6 462	21 471	30,1	-
Connected products	10 731	9 777	20 508	230 773	8,9	-
Retail sales of food, beverages and tobacco	6 040	4 909	10 950	114 071	9,6	-
Retail sales of textiles, clothing, footwear and leather goods	2 462	2 796	5 257	53 186	9,9	-
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	66	112	178	17 157	1,0	-
Retail sales of household furniture, appliances, articles and equipment	242	1 087	1 329	28 949	4,6	-
Retail sales of automotive fuel	1 921	873	2 794	17 464	16,0	-
Non-specific products	20 582	16 069	36 651	5 470 478	0,7	-
Services	14 312	4 178	18 490	3 288 428	0,6	-
Goods	6 270	11 891	18 161	2 182 050	0,8	-
Total tourism expenditures	102 877	71 747	174 624	5 932 595	2,9	60 545

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

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

Product	Domestic demand	International demand (exports)	Total demand	Total domestic supply	Tourism product ratio*	Tourism spending abroad (imports)
	(1)	(2)	(3) = (1)+(2)	(4)	(5) = (3)/(4)	(6)
	R million				Percentage	R million
Characteristic products	80 539	50 404	130 943	253 856	51,6	-
Accommodation services	16 194	12 348	28 543	29 724	96,0	-
Restaurants and similar	4 461	8 622	13 083	35 189	37,2	-
Passenger transport services	52 187	21 806	73 993	156 426	47,3	-
<i>Railway passenger transportation services</i>	302	120	422	6 004	7,0	-
<i>Road passenger transportation services</i>	33 516	10 693	44 209	118 305	37,4	-
<i>Water passenger transportation services</i>	8	2	10	19	50,7	-
<i>Air passenger transportation services</i>	15 757	9 828	25 585	26 561	96,3	-
<i>Transport equipment rental</i>	2 605	1 163	3 767	5 536	68,0	-
Travel agencies and similar services	5 428	2 281	7 709	7 866	98,0	-
Cultural services	130	142	271	1 233	22,0	-
Sports and recreational services	2 139	5 205	7 344	23 418	31,4	-
Connected products	10 869	12 901	23 770	256 787	9,3	-
Retail sales of food, beverages and tobacco	5 276	6 565	11 842	125 056	9,5	-
Retail sales of textiles, clothing, footwear and leather goods	2 939	3 972	6 912	60 629	11,4	-
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	79	124	203	18 783	1,1	-
Retail sales of household furniture, appliances, articles and equipment	267	1 190	1 458	31 344	4,7	-
Retail sales of automotive fuel	2 307	1 049	3 356	20 975	16,0	-
Non-specific products	22 614	22 118	44 732	5 950 441	0,8	-
Services	15 664	5 751	21 415	3 611 053	0,6	-
Goods	6 950	16 368	23 317	2 339 388	1,0	-
Total tourism expenditures	114 022	85 423	199 445	6 461 084	3,1	58 588

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

Table 3c: Tourism expenditure by product, South Africa, 2013

Product	Domestic demand	International demand (exports)	Total demand	Total domestic supply	Tourism product ratio*	Tourism spending abroad (imports)
	(1)	(2)	(3) = (1)+(2)	(4)	(5) = (3)/(4)	(6)
	R million				Percentage	R million
Characteristic products	88 639	55 005	143 644	276 381	52,0	-
Accommodation services	18 195	13 415	31 610	32 901	96,1	-
Restaurants and similar	5 093	9 054	14 148	37 896	37,3	-
Passenger transport services	55 930	23 484	79 414	167 927	47,3	-
<i>Railway passenger transportation services</i>	346	138	484	6 916	7,0	-
<i>Road passenger transportation services</i>	35 841	11 243	47 083	126 245	37,3	-
<i>Water passenger transportation services</i>	9	4	13	22	56,5	-
<i>Air passenger transportation services</i>	17 015	10 893	27 908	28 971	96,3	-
<i>Transport equipment rental</i>	2 720	1 206	3 927	5 773	68,0	-
Travel agencies and similar services	6 087	2 558	8 645	8 822	98,0	-
Cultural services	167	172	339	1 442	23,5	-
Sports and recreational services	3 167	6 321	9 488	27 393	34,6	-
Connected products	11 857	13 782	25 638	276 346	9,3	-
Retail sales of food, beverages and tobacco	5 699	7 061	12 760	134 735	9,5	-
Retail sales of textiles, clothing, footwear and leather goods	3 290	4 157	7 447	65 256	11,4	-
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	86	144	230	20 000	1,1	-
Retail sales of household furniture, appliances, articles and equipment	309	1 295	1 604	33 868	4,7	-
Retail sales of automotive fuel	2 474	1 124	3 598	22 487	16,0	-
Non-specific products	24 191	25 396	49 587	6 424 155	0,8	-
Services	16 843	6 603	23 446	3 901 023	0,6	-
Goods	7 348	18 793	26 141	2 523 132	1,0	-
Total tourism expenditures	124 687	94 183	218 870	6 976 882	3,1	62 596

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

The Tourism Balance of Payments for South Africa

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

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

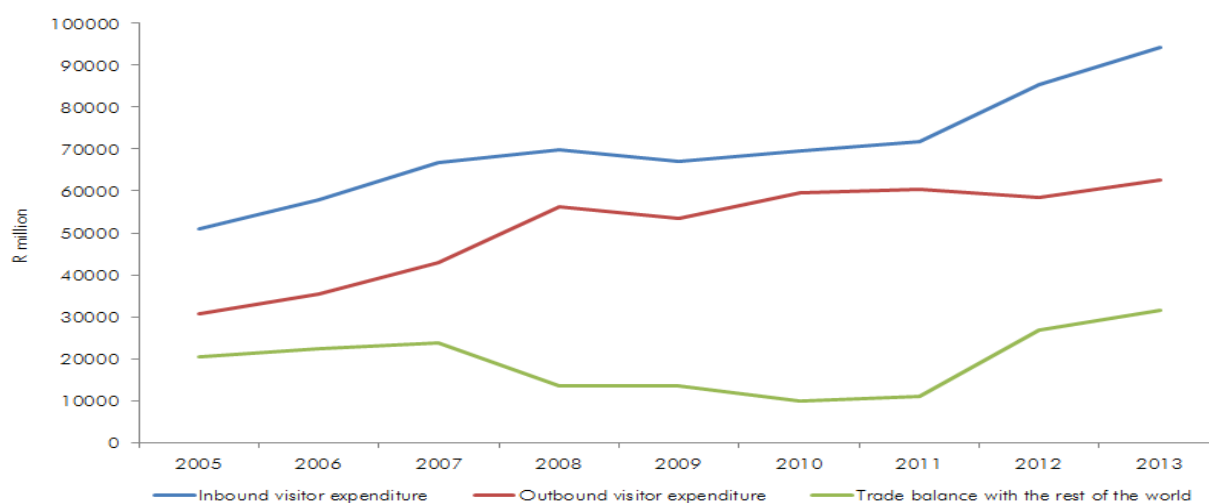
Table 4 and Figure 2 show the Tourism Balance of Payments for South Africa for the reference years 2005 to 2013.

Table 4: The Tourism Balance of Payments for South Africa, 2005 to 2013

Year	Inbound tourism expenditure	Outbound tourism expenditure	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	

Source: South African Reserve Bank

Figure 2: The Tourism Balance of Payments for South Africa, 2005 to 2013 (R million)



3.1.1 Inbound tourism expenditure

Table 5 and Table 6 as well as Figure 3 show inbound tourism expenditure by type of product (R million and percentage contribution), for the reference years 2011 to 2013.

Inbound tourism expenditure totalling R71 747 million was recorded in 2011. The main expenditure items were 'non-specific products' (22,4%), 'accommodation for visitors' (15,7%) and 'road passenger transport services' (13,6%). Inbound tourism expenditure totalling R94 183 million was recorded in 2013. The main expenditure items were 'non-specific products' (27,0%), 'connected products' (14,6%), 'accommodation for visitors' (14,2%) and 'road passenger transport services' (11,9%).

The year 2013 saw 14 317 908 non-resident visitors to South Africa compared with 13 069 034 non-resident visitors for 2012 and 12 097 490 non-resident visitors for 2011.

Table 5: Inbound tourism expenditure by type of product, 2011 to 2013 (R million)

Tourism product	2011	2012	2013
Accommodation for visitors	11 246	12 348	13 415
Restaurants and similar services	7 752	8 622	9 054
Railway passenger transport services	121	120	138
Road passenger transport services	9 726	10 693	11 243
Water passenger transport services	2	2	4
Air passenger transport services	8 976	9 828	10 893
Transport equipment rental	1 263	1 163	1 206
Travel agencies and other reservation services	1 938	2 281	2 558
Cultural services	128	142	172
Sports and recreational services	4 750	5 205	6 321
Tourism-connected products	9 777	12 901	13 782
Non-specific products	16 069	22 118	25 396
Total	71 747	85 423	94 183

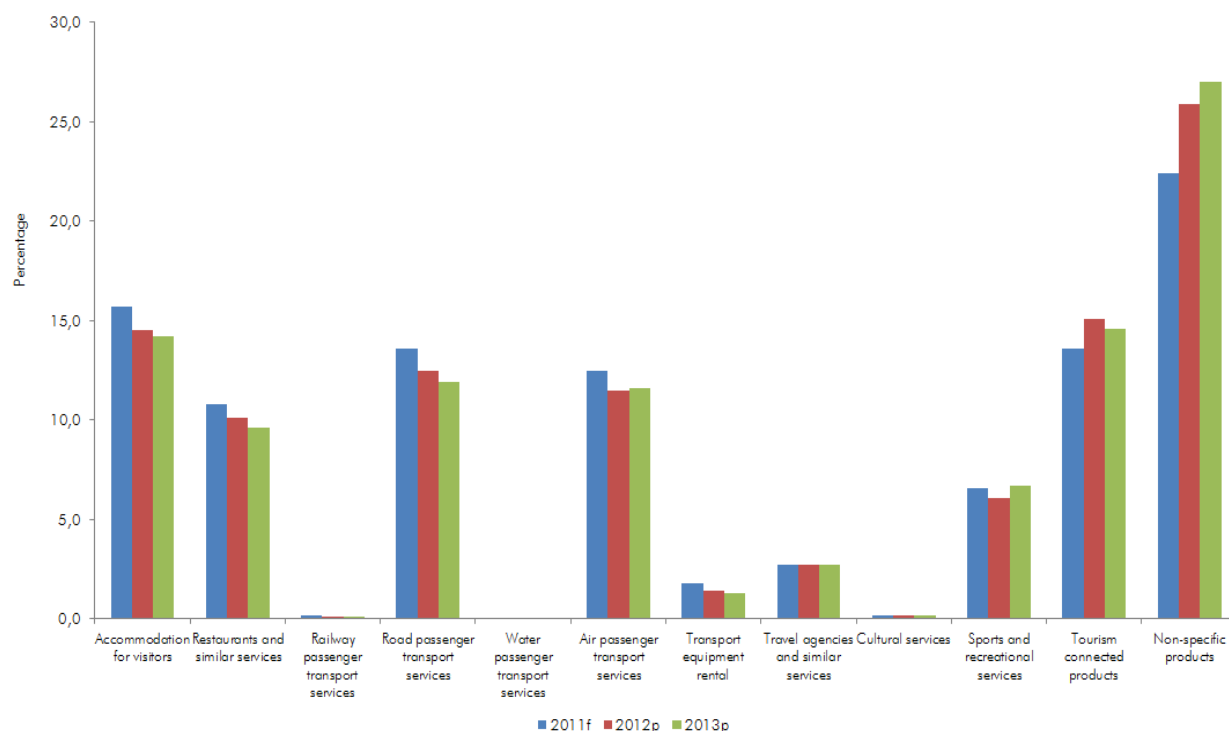
Individual figures may not add up to stated totals due to rounding.

Table 6: Inbound tourism expenditure by type of product, 2011 to 2013 (%)

Tourism product	2011	2012	2013
Accommodation for visitors	15,7	14,5	14,2
Restaurants and similar services	10,8	10,1	9,6
Railway passenger transport services	0,2	0,1	0,1
Road passenger transport services	13,6	12,5	11,9
Water passenger transport services	0,0	0,0	0,0
Air passenger transport services	12,5	11,5	11,6
Transport equipment rental	1,8	1,4	1,3
Travel agencies and other reservation services	2,7	2,7	2,7
Cultural services	0,2	0,2	0,2
Sports and recreational services	6,6	6,1	6,7
Tourism-connected products	13,6	15,1	14,6
Non-specific products	22,4	25,9	27,0
Total	100,0	100,0	100,0

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

Figure 3: Inbound tourism expenditure by type of product, 2011 to 2013 (%)



Source: Statistics South Africa

3.1.2 Domestic tourism expenditure

Table 7 and Table 8 as well as Figure 4 show domestic tourism expenditure by type of product (R million and percentage contribution), for the reference years 2011 to 2013.

Domestic tourism expenditure totalling R102 877 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2011. The main expenditure items were 'road passenger transport services' (30,5%), 'non-specific products' (20,0%), 'accommodation for visitors' (13,5%) and 'air passenger transport services' (12,9%).

Domestic tourism expenditure totalling R124 687 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2013. The main expenditure items were 'road passenger transport services' (28,7%), 'non-specific products' (19,4%), 'accommodation for visitors' (14,6%) and 'air passenger transport services' (13,6%).

Table 7: Domestic tourism expenditure by type of product, 2011 to 2013 (R million)

Tourism product	2011	2012	2013
Accommodation for visitors	13 928	16 194	18 195
Restaurants and similar services	4 252	4 461	5 093
Railway passenger transport services	242	302	346
Road passenger transport services	31 338	33 516	35 841
Water passenger transport services	7	8	9
Air passenger transport services	13 247	15 757	17 015
Transport equipment rental	2 105	2 605	2 720
Travel agencies and other reservation services	4 614	5 428	6 087
Cultural services	118	130	167
Sports and recreational services	1 712	2 139	3 167
Tourism-connected products	10 731	10 869	11 857
Non-specific products	20 582	22 614	24 191
Total	102 877	114 022	124 687

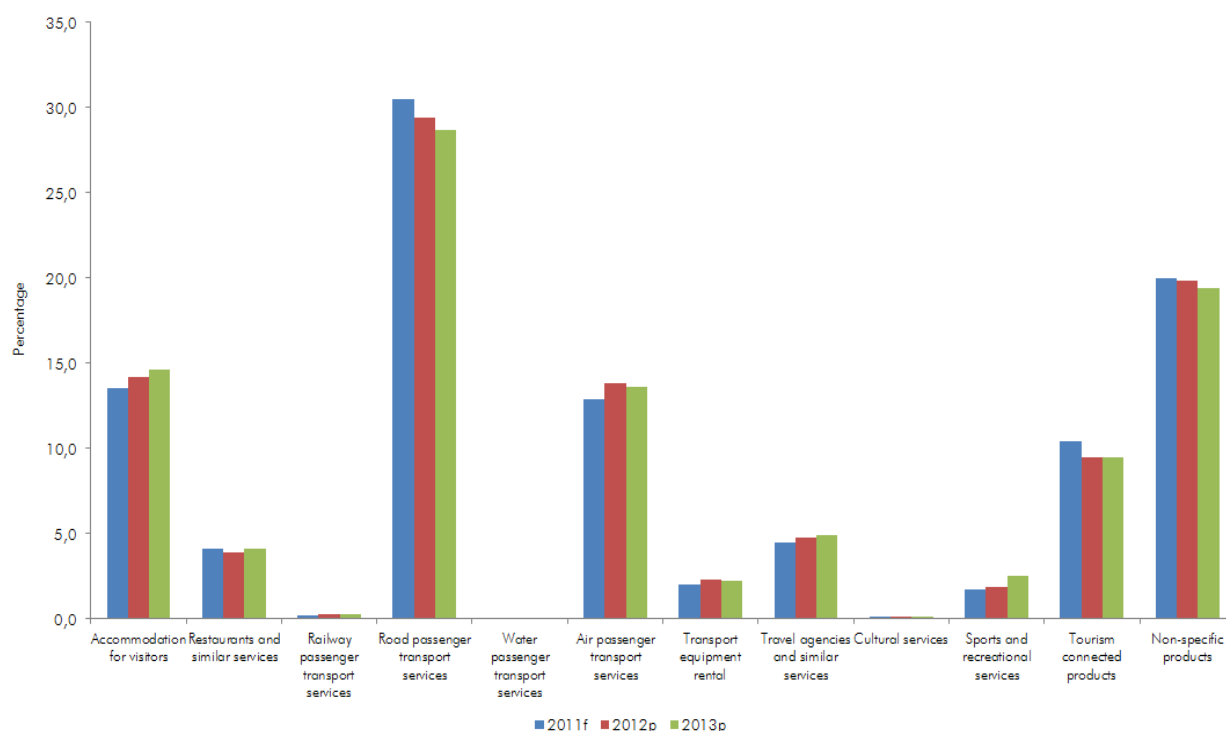
Individual figures may not add up to stated totals due to rounding.

Table 8: Domestic tourism expenditure by type of product, 2011 to 2013 (%)

Tourism product	2011	2012	2013
Accommodation for visitors	13,5	14,2	14,6
Restaurants and similar services	4,1	3,9	4,1
Railway passenger transport services	0,2	0,3	0,3
Road passenger transport services	30,5	29,4	28,7
Water passenger transport services	0,0	0,0	0,0
Air passenger transport services	12,9	13,8	13,6
Transport equipment rental	2,0	2,3	2,2
Travel agencies and other reservation services	4,5	4,8	4,9
Cultural services	0,1	0,1	0,1
Sports and recreational services	1,7	1,9	2,5
Tourism-connected products	10,4	9,5	9,5
Non-specific products	20,0	19,8	19,4
Total	100,0	100,0	100,0

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

Figure 4: Domestic tourism expenditure by type of product, 2011 to 2013 (%)



Source: Statistics South Africa

3.1.3. Internal tourism expenditure

Table 9 and Table 10 as well as Figure 5 show internal tourism expenditure by type of product (goods and services), for the reference years 2011 to 2013.

The total internal tourism consumption in cash for South Africa in 2011 was R174 624 million (inbound tourism consumption R71 747 million [41,1%] and domestic tourism consumption R102 877 million [58,9%]). The main expenditure items for internal tourism were 'road passenger transport services' (23,5%), 'non-specific products' (21,0%), 'accommodation for visitors' (14,4%) and 'air passenger transport services' (12,7%).

The total internal tourism consumption in cash for South Africa in 2013 was R218 870 million (inbound tourism consumption R94 183 million [43,0%] and domestic tourism consumption R124 687 million [57,0%]). The main expenditure items for internal tourism were 'non-specific products' (22,7%), 'road passenger transport services' (21,5%), 'accommodation for visitors' (14,4%) and 'air passenger transport services' (12,8%).

Table 9: Internal tourism expenditure by type of product, 2011 to 2013 (R million)

Tourism product	2011	2012	2013
Accommodation for visitors	25 174	28 543	31 610
Restaurants and similar services	12 004	13 083	14 148
Railway passenger transport services	363	422	484
Road passenger transport services	41 064	44 209	47 083
Water passenger transport services	9	10	13
Air passenger transport services	22 222	25 585	27 908
Transport equipment rental	3 367	3 767	3 927
Travel agencies and other reservation services	6 553	7 709	8 645
Cultural services	246	271	339
Sports and recreational services	6 462	7 344	9 488
Tourism-connected products	20 508	23 770	25 638
Non-specific products	36 651	44 732	49 587
Total	174 624	199 445	218 870

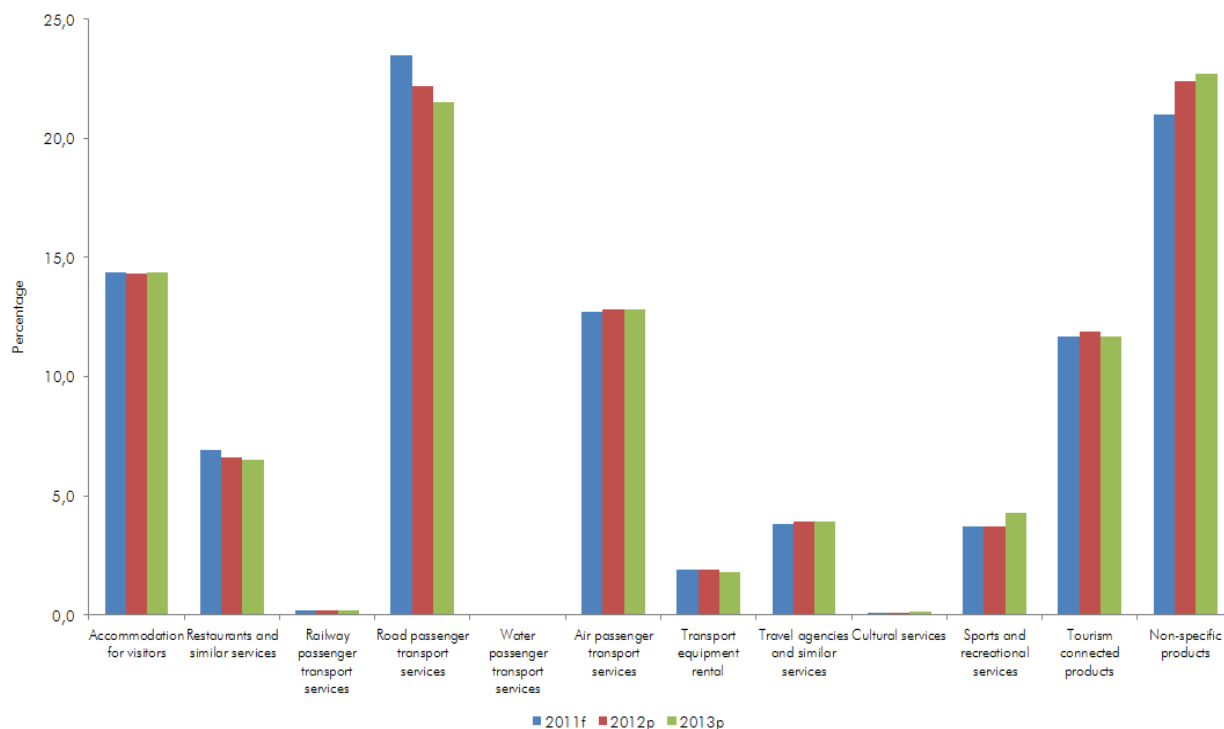
Individual figures may not add up to stated totals due to rounding.

Table 10: Internal tourism expenditure by type of product, 2011 to 2013 (%)

Tourism product	2011	2012	2013
Accommodation for visitors	14,4	14,3	14,4
Restaurants and similar services	6,9	6,6	6,5
Railway passenger transport services	0,2	0,2	0,2
Road passenger transport services	23,5	22,2	21,5
Water passenger transport services	0,0	0,0	0,0
Air passenger transport services	12,7	12,8	12,8
Transport equipment rental	1,9	1,9	1,8
Travel agencies and other reservation services	3,8	3,9	3,9
Cultural services	0,1	0,1	0,2
Sports and recreational services	3,7	3,7	4,3
Tourism-connected products	11,7	11,9	11,7
Non-specific products	21,0	22,4	22,7
Total	100,0	100,0	100,0

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

Figure 5: Internal tourism expenditure by type of product, 2011 to 2013 (%)



Source: Statistics South Africa

3.2 Production accounts

Table 5 of the TSA focuses on the production accounts of tourism industries and other industries (at basic prices). It conforms formally to the format established by the SNA, but the perspective is different from that of the SNA production accounts (a tool for tourism analysis). Because of the application of the principle of recording reservation services separately, output and intermediate consumption of each industry and the corresponding total for the economy that appears in the last column do not necessarily correspond to the corresponding values found in the national accounts of the country¹². For each industry and for the total economy, gross value added (GVA) at basic prices has to equal the GVA of the economy as it appears in the national accounts¹³.

Tables 11a to 11c show the production accounts for the tourism industries and other industries for the reference years 2011 to 2013. 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 R154 535 million (or 5,7% of total GVA generated) in 2011, R166 266 million (or 5,7% of total GVA generated) in 2012 and R179 450 million (or 5,7% of total GVA generated) in 2013.

¹² TSA: RMF

¹³ Adjustments due to the application of the principle of recording reservation services separately have no effect on the VA of any of the industries.

Table 11a: Production accounts of the tourism industries and other industries (at basic prices), 2011 (R million)

Product	Tourism-characteristic industries	Tourism-related industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	213 061	91 210	157 846	462 117
<i>A.1 Characteristic products</i>	213 061		18 283	231 344
1. Accommodation services	22 350		4 121	26 472
1.1 Hotel and other accommodation for visitors other than 1.2			4 121	26 472
1.2 Accommodation services associated with all types of vacation home ownership	22 350			
2. Restaurants and similar services	22 494		9 402	31 896
3. Passenger transport services	138 933		4 760	143 692
3.1 Railway passenger transport services	5 171			5 171
3.2 Road passenger transport services	105 719		4 760	110 478
3.3 Water passenger transport services	17			17
3.4 Air passenger transport services	23 074			23 074
3.5 Passenger transport equipment rental	4 952			4 952
4. Travel agencies and other reservation services	6 683			6 683
5. Cultural industry	1 130			1 130
6. Sports and recreational industry	21 471			21 471
A.2 Connected products		91 210	139 563	230 773
Retail sales of food, beverages and tobacco		35 571	78 446	114 017
Retail sales of textiles, clothing, footwear and leather products		13 297	39 890	53 186
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		11 307	5 850	17 157
Retail sales of household furniture, appliances, articles and equipment		19 983	8 966	28 949
Retail sales of automotive fuel		11 053	6 411	17 464
B. Non-specific products	22 603	1 024	5 446 851	5 470 478
Services	22 603	1 024	3 264 801	3 288 428
Goods			2 182 050	2 182 050
Total output (at basic prices)	235 664	92 234	5 604 697	5 932 595
Total intermediate consumption (at purchasers' price)	132 058	41 305	3 034 209	3 207 572
Total gross value added (at basic prices)	103 607	50 928	2 570 487	2 725 022
Compensation of employees	35 403	27 143	1 295 565	1 358 111
Taxes less subsidies on production	1 298	901	41 602	43 802
Gross operating surplus	66 905	22 884	1 233 320	1 323 109

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), 2012
(R million)

Product	Tourism-characteristic industries	Tourism-related industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	233 315	100 865	176 463	510 643
<i>A.1 Characteristic products</i>	233 315		20 541	253 856
1. Accommodation services	25 085		4 638	29 724
1.1 Hotel and other accommodation for visitors other than 1.2				
1.2 Accommodation services associated with all types of vacation home ownership	25 085		4 638	29 724
2. Restaurants and similar services	25 034		10 155	35 189
3. Passenger transport services	150 678		5 748	156 426
3.1 Railway passenger transport services	6 004			6 004
3.2 Road passenger transport services	112 557		5 748	118 305
3.3 Water passenger transport services	19			19
3.4 Air passenger transport services	26 561			26 561
3.5 Passenger transport equipment rental	5 536			5 536
4. Travel agencies and other reservation services	7 886			7 886
5. Cultural industry	1 233			1 233
6. Sports and recreational industry	23 418			23 418
A.2 Connected products		100 865	155 922	256 787
Retail sales of food, beverages and tobacco		38 400	86 656	125 056
Retail sales of textiles, clothing, footwear and leather products		15 157	45 472	60 629
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		12 114	6 669	18 783
Retail sales of household furniture, appliances, articles and equipment		21 313	10 031	31 344
Retail sales of automotive fuel		13 882	7 094	20 975
B. Non-specific products	24 737	1 135	5 924 569	5 950 441
Services	24 737	1 135	3 585 181	3 611 053
Goods			2 339 388	2 339 388
Total output (at basic prices)	258 052	102 000	6 101 032	6 461 084
Total intermediate consumption (at purchasers' price)	146 549	47 237	3 327 658	3 521 443
Total gross value added (at basic prices)	111 503	54 764	2 773 374	2 939 640
Compensation of employees	38 221	29 607	1 406 024	1 473 852
Taxes less subsidies on production	1 212	983	43 883	46 078
Gross operating surplus	72 072	24 174	1 323 465	1 419 710

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), 2013
(R million)

Product	Tourism-characteristic industries	Tourism-related industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	253 614	107 436	191 677	552 727
<i>A.1 Characteristic products</i>	253 614		22 767	276 381
1. Accommodation services	27 612		5 289	32 901
1.1 Hotel and other accommodation for visitors other than 1.2			5 289	32 901
1.2 Accommodation services associated with all types of vacation home ownership	27 612			
2. Restaurants and similar services	27 058		10 838	37 896
3. Passenger transport services	161 287		6 640	167 927
3.1 Railway passenger transport services	6 916			6 916
3.2 Road passenger transport services	119 605		6 640	126 245
3.3 Water passenger transport services	22			22
3.4 Air passenger transport services	28 971			28 971
3.5 Passenger transport equipment rental	5 773			5 773
4. Travel agencies and other reservation services	8 822			8 822
5. Cultural industry	1 442			1 442
6. Sports and recreational industry	27 393			27 393
A.2 Connected products		107 436	168 910	276 346
Retail sales of food, beverages and tobacco		40 528	94 207	134 735
Retail sales of textiles, clothing, footwear and leather products		16 314	48 942	65 256
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		12 822	7 178	20 000
Retail sales of household furniture, appliances, articles and equipment		23 026	10 842	33 868
Retail sales of automotive fuel		14 747	7 740	22 487
B. Non-specific products	27 227	1 126	6 395 803	6 424 155
Services	27 227	1 126	3 872 671	3 901 023
Goods			2 523 132	2 523 132
Total output (at basic prices)	280 840	108 562	6 587 480	6 976 882
Total intermediate consumption (at purchasers' price)	160 033	49 919	3 593 969	3 803 921
Total gross value added (at basic prices)	120 807	58 643	2 993 510	3 172 961
Compensation of employees	42 257	33 019	1 535 371	1 610 647
Taxes less subsidies on production	1 787	1 139	53 323	56 249
Gross operating surplus	76 766	24 485	1 404 814	1 506 065

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

3.3 Domestic supply and internal tourism consumption by product

Table 6 is the core of the TSA and focuses on total domestic supply and internal tourism consumption (at purchasers' prices). The confrontation and reconciliation between supply and demand (inclusive of internal tourism consumption) takes place within this table. It is derived from the SU-tables in the SNA¹⁴. Tables 12a to 12c show the domestic supply and internal tourism consumption by product (Table 6 of the TSA), for the reference years 2011 to 2013. The tourism direct gross value added (TDGVA) for South Africa amounted to R77 393 million (or 2,8% of total GVA generated) in 2011, R86 361 million (or 2,9% of total GVA generated) in 2012 and R95 607 million (or 3,0% of total GVA generated) in 2013.

Tables 13a to 13c show the compilation of tourism industry ratios for the reference years 2011 to 2013.

Tourism industry ratio

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

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

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

- 3 A *non-tourism-related industry* is any industry that is not a tourism-characteristic or tourism-related industry. A non-tourism industry may still sell some of its products to visitors.

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

¹⁴ TSA: RMF

Table 12a: Domestic supply and internal tourism consumption by product, 2011 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total output of domestic producers at basic prices	Taxes less subsidies
	Accommodation for visitors	Food and beverage serving industry	Passenger transport industry	Transport equipment rental	Travel agencies and other reservation services industry	Cultural and sport and recreational industry		Trade of tourism-connected goods			
A. Specific products	23 660	6 060	61 889	3 367	6 553	6 708	108 238	7 533	22 201	137 973	
A.1 Characteristic products	23 660	6 060	61 889	3 367	6 553	6 708	108 238		9 227	117 465	
1. Accommodation services	21 255						21 255		3 919	25 174	
1.1 Hotel and other accommodation for visitors other than 1.2	21 255						21 255		3 919	25 174	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 405	6 060					8 465		3 538	12 004	
3. Passenger transport services			61 889	3 367			65 257		1 769	67 026	
3.1 Railway passenger transport services			363				363			363	
3.2 Road passenger transport services			39 295				39 295		1 769	41 064	
3.3 Water passenger transport services			9				9			9	
3.4 Air passenger transport services			22 222				22 222			22 222	
3.5 Passenger transport equipment rental				3 367			3 367			3 367	
4. Travel agencies and other reservation services					6 553		6 553			6 553	
5. Cultural industry						246	246			246	
6. Sports and recreational industry						6 462	6 462			6 462	
A.2 Connected products								7 533	12 975	20 508	
Retail sales of food, beverages and tobacco								3 416	7 533	10 950	
Retail sales of textiles, clothing, footwear and leather products								1 314	3 943	5 257	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								117	61	178	
Retail sales of household furniture, appliances, articles and equipment								917	412	1 329	
Retail sales of automotive fuel								1 768	1 026	2 794	
B. Non-specific products	9 131	1	7	1		18	9 158	3	27 490	36 651	
Services	9 131	1	7	1		18	9 158	3	9 329	18 490	
Goods									18 161	18 161	
Total output (at basic prices)	32 791	6 061	61 897	3 368	6 553	6 726	117 396	7 536	49 691	174 623	6 598
Total intermediate consumption (at purchasers' price)	18 095	3 925	34 529	2 117	3 636	4 652	66 954	3 375	26 901	97 230	
Total gross value added (at basic prices)	14 696	2 136	27 367	1 251	2 916	2 074	50 442	4 161	22 790	77 393	

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

Table 12b: Domestic supply and internal tourism consumption by product, 2012 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total output of domestic producers at basic prices	Taxes less subsidies
	Accommodation for visitors	Food and beverage serving industry	Passenger transport industry	Transport equipment rental	Travel agencies and other reservation services industry	Cultural and sport and recreational industry		Trade of tourism-connected goods			
A. Specific products	26 699	6 697	68 078	3 767	7 709	7 615	120 565	8 707	25 440	154 713	
A.1 Characteristic products	26 699	6 697	68 078	3 767	7 709	7 615	120 565		10 377	130 943	
1. Accommodation services	24 089						24 089		4 454	28 543	
1.1 Hotel and other accommodation for visitors other than 1.2	24 089						24 089		4 454	28 543	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 610	6 697					9 307		3 775	13 083	
3. Passenger transport services			68 078	3 767			71 845		2 148	73 993	
3.1 Railway passenger transport services			422				422			422	
3.2 Road passenger transport services			42 061				42 061		2 148	44 209	
3.3 Water passenger transport services			10				10			10	
3.4 Air passenger transport services			25 585				25 585			25 585	
3.5 Passenger transport equipment rental				3 767			3 767			3 767	
4. Travel agencies and other reservation services					7 709		7 709			7 709	
5. Cultural industry						271	271			271	
6. Sports and recreational industry						7 344	7 344			7 344	
A.2 Connected products								8 707	15 063	23 770	
Retail sales of food, beverages and tobacco								3 636	8 206	11 842	
Retail sales of textiles, clothing, footwear and leather products								1 728	5 184	6 912	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								131	72	203	
Retail sales of household furniture, appliances, articles and equipment								991	466	1 458	
Retail sales of automotive fuel								2 221	1 135	3 356	
B. Non-specific products	9 942	1	8	1	5	20	9 977	3	34 753	44 733	
Services	9 942	1	8	1	5	20	9 977	3	11 436	21 415	
Goods									23 317	23 317	
Total output (at basic prices)	36 641	6 698	68 087	3 768	7 714	7 634	130 542	8 710	60 193	199 445	7 104
Total intermediate consumption (at purchasers' price)	21 518	4 254	37 985	2 675	4 367	5 421	76 219	4 034	32 831	113 084	
Total gross value added (at basic prices)	15 123	2 445	30 101	1 093	3 347	2 214	54 323	4 677	27 362	86 361	

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

Table 12c: Domestic supply and internal tourism consumption by product, 2013 (R million)

Product	Tourism-characteristic industries						Total tourism-characteristic industries	Tourism-connected industry	Other industries	Total output of domestic producers at basic prices	Taxes less subsidies
	Accommodation for visitors	Food and beverage serving industry	Passenger transport industry	Transport equipment rental	Travel agencies and other reservation services industry	Cultural and sport and recreational industry		Trade of tourism-connected goods			
A. Specific products	29 362	7 268	73 012	3 927	8 645	9 827	132 040	9 297	27 946	169 283	
A.1 Characteristic products	29 362	7 268	73 012	3 927	8 645	9 827	132 040		11 604	143 644	
1. Accommodation services	26 529						26 529		5 082	31 610	
1.1 Hotel and other accommodation for visitors other than 1.2	26 529						26 529		5 082	31 610	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 834	7 268					10 102		4 046	14 148	
3. Passenger transport services			73 012	3 927			76 938		2 476	79 414	
3.1 Railway passenger transport services			484				484			484	
3.2 Road passenger transport services			44 607				44 607		2 476	47 083	
3.3 Water passenger transport services			13				13			13	
3.4 Air passenger transport services			27 908				27 908			27 908	
3.5 Passenger transport equipment rental				3 927			3 927			3 927	
4. Travel agencies and other reservation services					8 645		8 645			8 645	
5. Cultural industry						339	339			339	
6. Sports and recreational industry						9 488	9 488			9 488	
A.2 Connected products								9 297	16 341	25 638	
Retail sales of food, beverages and tobacco								3 838	8 922	12 760	
Retail sales of textiles, clothing, footwear and leather products								1 862	5 585	7 447	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								147	82	230	
Retail sales of household furniture, appliances, articles and equipment								1 090	513	1 604	
Retail sales of automotive fuel								2 359	1 238	3 598	
B. Non-specific products	10 660	1	11	1	5	26	10 704	4	38 879	49 588	
Services	10 660	1	11	1	5	26	10 704	4	12 738	23 446	
Goods									26 141	26 141	
Total output (at basic prices)	40 022	7 269	73 023	3 927	8 650	9 852	142 744	9 301	66 825	218 870	7 950
Total intermediate consumption (at purchasers' price)	23 360	4 546	39 135	2 784	4 982	7 720	82 529	4 277	36 458	123 264	
Total gross value added (at basic prices)	16 662	2 724	33 887	1 143	3 668	2 131	60 216	5 024	30 367	95 607	

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

Table 13a: Derivation of tourism industry ratios, 2011 (R million)

Product	Tourism-characteristic industries										Tourism-related industries
	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	23 660	6 060	363	39 295	9	22 222	3 367	6 553	246	6 462	7 533
A.1 Characteristic products	23 660	6 060	363	39 295	9	22 222	3 367	6 553	246	6 462	
1. Accommodation services	21 255										
1.1 Hotel and other accommodation for visitors other than 1.2	21 255										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 405	6 060									
3. Passenger transport services			363	39 295	9	22 222	3 367				
3.1 Railway passenger transport services			363								
3.2 Road passenger transport services				39 295							
3.3 Water passenger transport services					9						
3.4 Air passenger transport services						22 222					
3.5 Passenger transport equipment rental							3 367				
4. Travel agencies and other reservation services								6 553			
5. Cultural industry									246		
6. Sports and recreational industry										6 462	
A.2 Connected products											7 533
Retail sales of food, beverages and tobacco											3 416
Retail sales of textiles, clothing, footwear and leather products											1 314
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											117
Retail sales of household furniture, appliances, articles and equipment											917
Retail sales of automotive fuel											1768
B. Non-specific products	9 131	1		2		5	1				3
Services	9 131	1		2		5	1				3
Goods											
Total purchased by tourists	32 791	6 061	363	39 297	9	22 228	3 368	6 553	246	6 462	7 536
Total industry output	41 786	16 425	5 171	106 426	17	24 905	5 153	6 683	1 455	27 642	92 234
Tourism industry ratio	78,0	37,0	7,0	37,0	56,0	89,0	65,0	98,0	17,0	23,0	8,0

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

Table 13b: Derivation of tourism industry ratios, 2012 (R million)

Product	Tourism-characteristic industries										Tourism-related industries
	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	26 699	6 697	422	42 061	10	25 585	3 767	7 709	271	7 344	8 707
A.1 Characteristic products	26 699	6 697	422	42 061	10	25 585	3 767	7 709	271	7 344	
1. Accommodation services	24 089										
1.1 Hotel and other accommodation for visitors other than 1.2	24 089										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 610	6 697									
3. Passenger transport services			422	42 061	10	25 585	3 767				
3.1 Railway passenger transport services			422								
3.2 Road passenger transport services				42 061							
3.3 Water passenger transport services					10						
3.4 Air passenger transport services						25 585					
3.5 Passenger transport equipment rental							3 767				
4. Travel agencies and other reservation services								7 709			
5. Cultural industry									271		
6. Sports and recreational industry										7 344	
A.2 Connected products											8 707
Retail sales of food, beverages and tobacco											3 636
Retail sales of textiles, clothing, footwear and leather products											1 728
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											131
Retail sales of household furniture, appliances, articles and equipment											991
Retail sales of automotive fuel											2 221
B. Non-specific products	9 942	1		2		6		5			3
Services	9 942	1		2		6		5			3
Goods											
Total purchased by tourists	36 641	6 698	422	42 064	10	25 591	3 767	7 714	271	7 344	8 710
Total industry output	46 308	18 378	6 004	113 304	19	28 668	5 764	7 871	1 587	30 149	102 000
Tourism industry ratio	79,0	36,0	7,0	37,0	51,0	89,0	65,0	98,0	17,0	24,0	9,0

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

Table 13c: Derivation of tourism industry ratios, 2013 (R million)

Product	Tourism-characteristic industries										Tourism-related industries
	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade of tourism-connected goods
A. Specific products	29 362	7 268	484	44 607	13	27 908	3 927	8 645	339	9 488	9 297
A.1 Characteristic products	29 362	7 268	484	44 607	13	27 908	3 927	8 645	339	9 488	
1. Accommodation services	26 529										
1.1 Hotel and other accommodation for visitors other than 1.2	26 529										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	2 834	7 268									
3. Passenger transport services			484	44 607	13	27 908	3 927				
3.1 Railway passenger transport services			484								
3.2 Road passenger transport services				44 607							
3.3 Water passenger transport services					13						
3.4 Air passenger transport services						27 908					
3.5 Passenger transport equipment rental							3 927				
4. Travel agencies and other reservation services								8 645			
5. Cultural industry									339		
6. Sports and recreational industry										9 488	
A.2 Connected products											9 297
Retail sales of food, beverages and tobacco											3 838
Retail sales of textiles, clothing, footwear and leather products											1 862
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											147
Retail sales of household furniture, appliances, articles and equipment											1 090
Retail sales of automotive fuel											2 539
B. Non-specific products	10 660	1		3		8		5			4
Services	10 660	1		3		8		5			4
Goods											
Total purchased by tourists	40 022	7 269	484	44 610	13	27 916	3 927	8 650	339	9 488	9 301
Total industry output	50 430	19 852	6 916	120 394	22	31 269	6 008	8 827	1 856	35 266	108 562
Tourism industry ratio	79,0	37,0	7,0	37,0	57,0	89,0	65,0	98,0	18,0	27,0	9,0

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

Tourism direct gross value added and tourism direct gross domestic product

Table 6¹⁵ of the TSA presents the reconciliation between internal tourism consumption and domestic supply, and it is from this table that TDGVA and tourism direct gross domestic product (TDGDP) can be derived. Part of the aggregate TDGVA can be generated by tourism industries and part of it may also be generated by other industries. Not all GVATI is part of the TDGVA as these industries may also serve non-visitors, in the same way the non-tourism industries may serve visitors and thus generate part of TDGVA¹⁶. The estimates of TDGVA and TDGDP rely on a number of assumptions and implicit modelling procedures, and thus special care must be taken when using or interpreting these aggregates¹⁷. Figure 6 explains schematically the link between GDVATI and TDGVA.

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

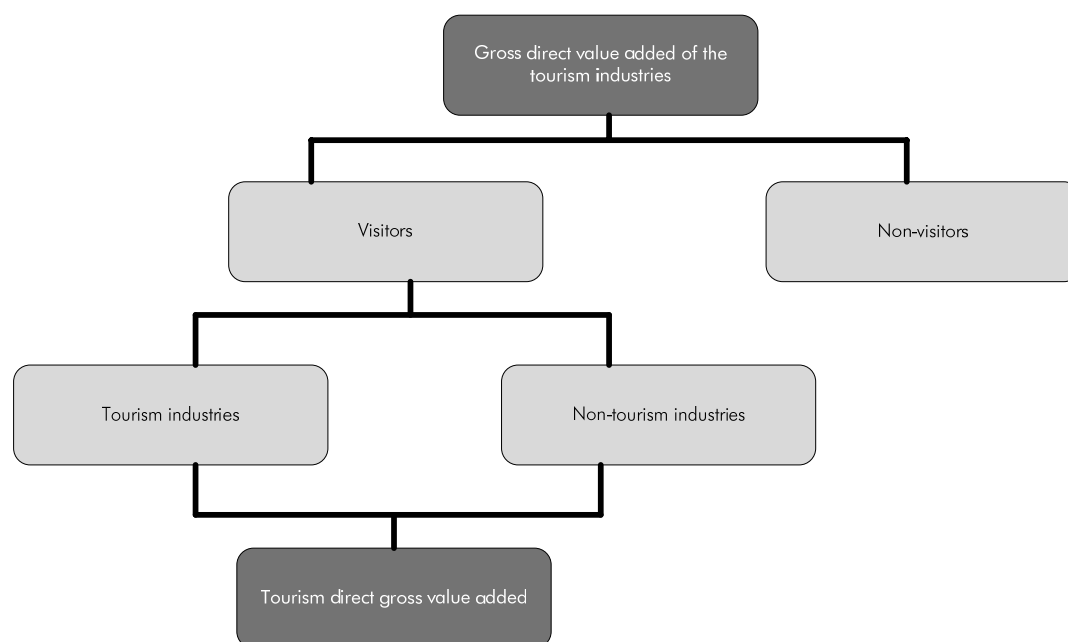


Table 14 shows the calculation of TDGVA and TDGDP for South Africa for 2011 to 2013. TDGDP was R83 991 million (or 2,8% of total GDP) for 2011, R93 465 million (or 2,9% of total GDP) in 2012 and R103 557 million (or 2,9% of total GDP) for 2013.

¹⁵ This table is the core of the TSA.

¹⁶ TSA: RMF

¹⁷ TSA: RMF

Table 14: Tourism direct gross value added and tourism direct gross domestic product, 2011 to 2013 (R million)

	2011	2012	2013
Total supply of goods and services	7 127 205	7 795 799	8 513 339
Less imports of goods and services	894 678	1 011 810	1 175 090
Less net taxes (taxes less subsidies) on products	299 928	322 902	361 365
Equals total domestic supply of goods and services (output)	5 932 595	6 461 084	6 976 882
Less intermediate consumption	3 207 572	3 521 443	3 803 921
Gross value added of the economy	2 725 022	2 939 640	3 172 961
Total tourism output	174 624	199 445	218 870
Less total tourism intermediate consumption	97 230	113 084	123 264
Equals tourism direct gross value added (TDGVA)	77 393	86 361	95 607
TDGVA (%)	2,8	2,9	3,0
Tourism direct gross value added	77 393	86 361	95 607
Plus tourism share of net taxes on products	6 598	7 104	7 950
Equals tourism direct gross domestic product (TDGDP)	83 991	93 465	103 557
TDGDP¹⁸ (%)	2,8	2,9	2,9

Table 15 and Table 16 as well as Figure 7 show TDGVA for 2011 to 2013 (R million and percentage contribution).

Table 15: Tourism direct gross value added, 2011 to 2013 (R million)

Tourism product	2011	2012	2013
Accommodation for visitors	14 696	15 123	16 662
Food and beverages serving industry	2 136	2 445	2 724
Railway passenger transport	237	282	321
Road passenger transport	19 809	21 587	23 227
Water passenger transport	3	4	5
Air passenger transport	7 318	8 228	10 334
Transport equipment rental	1 251	1 093	1 143
Travel agencies and other reservation services industry	2 916	3 347	3 668
Cultural industry	76	79	73
Sports and recreational industry	1 998	2 135	2 058
Retail trade of tourism-connected goods	4 161	4 677	5 024
Other non-tourism industries	22 790	27 362	30 367
Total	77 393	86 361	95 607

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

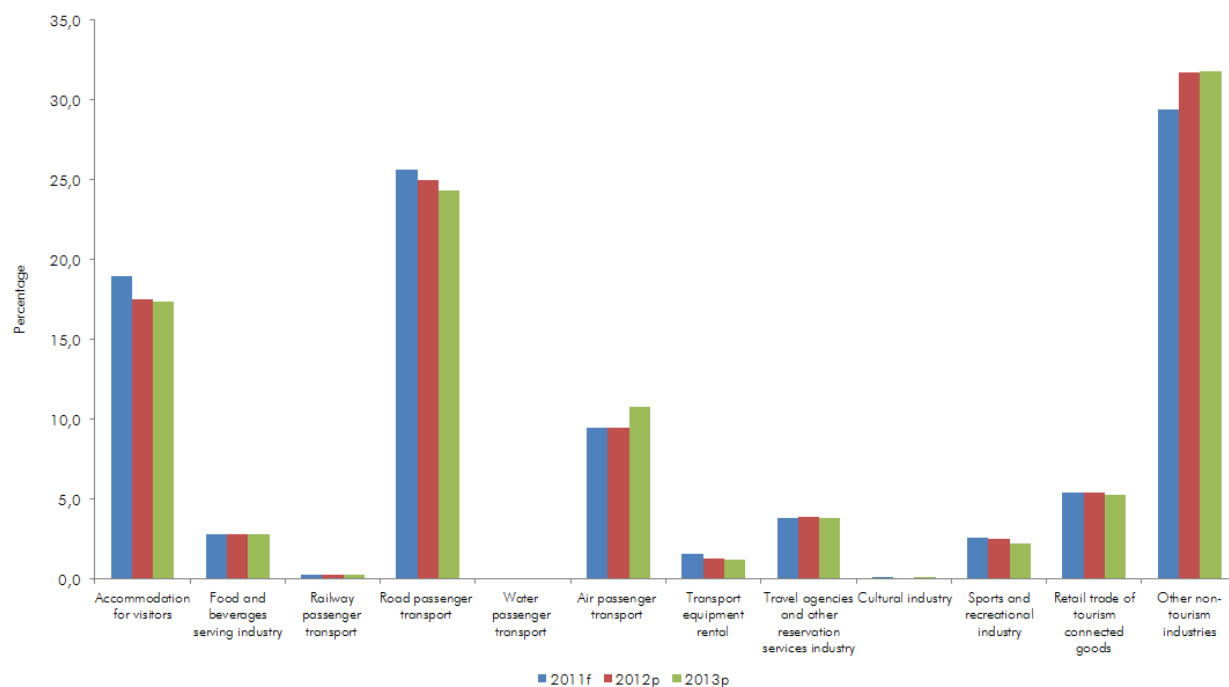
¹⁸ Gross domestic product is equal to gross value added plus net taxes on products.

Table 16: Tourism direct gross value added, 2011 to 2013 (%)

Tourism product	2011	2012	2013
Accommodation for visitors	19,0	17,5	17,4
Food and beverages serving industry	2,8	2,8	2,8
Railway passenger transport	0,3	0,3	0,3
Road passenger transport	25,6	25,0	24,3
Water passenger transport	0,0	0,0	0,0
Air passenger transport	9,5	9,5	10,8
Transport equipment rental	1,6	1,3	1,2
Travel agencies and other reservation services industry	3,8	3,9	3,8
Cultural industry	0,1	0,1	0,1
Sports and recreational industry	2,6	2,5	2,2
Retail trade of tourism-connected goods	5,4	5,4	5,3
Other non-tourism industries	29,4	31,7	31,8
Total	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, 2011 to 2013 (%)



Source: Statistics South Africa

3.4 Employment in the tourism industries

Tourism employment is a measure of the number of jobs in tourism and non-tourism industries. Tourism employment is the employment strictly related to the goods and services (tourism-connected and non-tourism-connected) acquired by visitors and produced either by tourism industries or other industries that cannot be directly observed¹⁹. South Africa does not have a direct measure of tourism employment. Therefore, employment in the tourism industries includes employment that is directly and/or indirectly related to the goods and services acquired by tourists and non-tourists.

Tables 17a to 17c show employment in the tourism industries by population group for the reference years 2011 to 2013. There were 623 299 persons (or 4,4% of total employment) directly engaged in producing goods and services purchased by visitors in 2011, 645 755 persons (or 4,5% of total employment) in 2012 and 655 609 (or 4,4% of total employment) in 2013. Tourism industry ratios have been used to allocate employment numbers (by industry) to tourism²⁰.

Cautionary note on employment in the tourism industries

Revision of the old Labour Force Survey

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

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

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

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

¹⁹ TSA: RMF

²⁰ This treatment assumes that, for each industry, a given rand value of output will require a fixed quantity of labour input, regardless of whether the products are purchased by tourists or non-tourists.

Table 17a: Employment in the tourism industries by population group, 2011 (No. of persons)

Population group	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	108 747	257 211	51 575	375 077	791	14 079	9 148	9 960	41 363	33 268	870 198	1 771 417
Coloured	17 370	30 291	14 079	41 378	491	2 802	2 059	3 689	6 959	8 315	164 989	292 421
Indian/Asian	7 552	12 659	2 220	19 406	111	1 895	471	1 196	7 619	1 172	88 994	143 295
White	26 071	35 072	13 437	42 874	1 071	10 306	8 205	4 778	19 346	12 220	180 389	353 769
Total	159 471	335 232	81 311	478 735	2 464	29 081	19 883	19 623	76 287	54 975	1 304 571	2 560 901
Tourism industry ratio	78,0	37,0	7,0	37,0	56,0	89,0	65,0	98,0	17,0	23,0	8,0	
Tourism employment												
Black African	85 338	94 918	3 619	138 495	443	12 565	5 978	9 765	7 001	7 778	71 103	437 004
Coloured	13 631	11 178	988	15 279	275	2 501	1 346	3 617	1 178	1 944	13 481	65 416
Indian/Asian	5 926	4 671	156	7 165	62	1 691	308	1 173	1 290	274	7 272	29 989
White	20 459	12 942	943	15 831	600	9 198	5 362	4 684	3 275	2 857	14 739	90 891
Total	125 354	123 710	5 705	176 770	1 381	25 955	12 994	19 239	12 744	12 852	106 596	623 299

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

Table 17b: Employment in the tourism industries by population group, 2012 (No. of persons)

Population group	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	107 001	243 432	63 455	408 822	963	18 306	16 521	10 236	36 309	44 232	924 242	1 873 520
Coloured	18 455	35 152	9 185	29 979	490	5 821	2 202	3 257	11 608	7 350	164 548	288 046
Indian/Asian	1 570	12 994	2 294	18 846	249	2 758	1 809	1 708	4 115	2 782	79 970	129 097
White	23 978	42 838	11 528	28 278	3 626	13 712	7 435	2 938	21 635	14 413	161 246	331 625
Total	151 005	334 415	86 462	485 925	5 328	40 596	27 968	18 139	73 666	68 777	1 330 006	2 622 288
Tourism industry ratio	79,0	36,0	7,0	37,0	51,0	89,0	65,0	98,0	17,0	24,0	9,0	
Tourism employment												
Black African	84 663	88 727	4 456	151 773	488	16 341	10 799	10 032	6 206	10 775	78 925	463 185
Coloured	14 603	12 812	645	11 130	248	5 196	1 439	3 192	1 984	1 790	14 051	67 091
Indian/Asian	1 243	4 736	161	6 997	126	2 462	1 183	1 674	703	678	6 829	26 791
White	18 972	15 614	809	10 498	1 839	12 240	4 860	2 879	3 698	3 511	13 769	88 688
Total	119 480	121 889	6 071	180 398	2 701	36 238	18 281	17 777	12 591	16 754	113 575	645 755

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

Table 17c: Employment in the tourism industries by population group, 2013 (No. of persons)

Population group	Accommodation for visitors	Food and beverage serving industry	Railway passenger transport	Road passenger transport	Water passenger transport	Air passenger transport	Transport equipment rental	Travel agencies and other reservation services industry	Cultural industry	Sports and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	90 216	258 169	75 286	432 852	1 185	18 438	9 299	15 198	46 978	38 144	975 580	1 961 345
Coloured	15 846	36 746	8 225	36 166	165	3 842	3 489	4 552	11 935	6 727	163 754	291 447
Indian/Asian	1 350	11 124	508	21 002	1 021	1 461	3 208	1 197	1 292	3 158	76 584	121 904
White	22 686	41 897	12 638	37 904	1 906	11 996	4 130	4 302	24 208	15 012	161 234	337 914
Total	130 097	347 936	96 656	527 924	4 277	35 737	20 127	25 249	84 412	63 041	1 377 152	2 712 610
Tourism industry ratio	79,0	37,0	7,0	37,0	57,0	89,0	65,0	98,0	18,0	27,0	9,0	
Tourism employment												
Black African	71 597	94 537	5 268	160 387	670	16 461	6 078	14 894	8 574	10 262	83 585	472 311
Coloured	12 575	13 456	575	13 401	93	3 430	2 281	4 461	2 178	1 810	14 030	68 290
Indian/Asian	1 071	4 074	36	7 782	577	1 305	2 097	1 173	236	850	6 561	25 760
White	18 004	15 342	884	14 045	1 077	10 709	2 700	4 216	4 418	4 039	13 814	89 248
Total	103 247	127 408	6 763	195 614	2 417	31 905	13 155	24 743	15 406	16 960	117 990	655 609

Individual figures may not add up to stated totals due to rounding.
 Source: Statistics South Africa, *Quarterly Labour Force Survey, 2013*

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

In accordance with the recommendations set out by the 2008 TSA: RMF, the South African TSA for the reference years 2011 to 2013 focused on the compilation of Tables 1–7 and Table 10. Improvements have been made in the collection of tourism data during the last financial year. These are articulated below.

- The Stats SA domestic tourism survey (DTS) now provides a breakdown of total domestic tourism expenditure between same day visitors and tourists (2013 DTS). Previously the DTS only provided this breakdown for expenditure on the last trip.

The next TSA report for South Africa will be the final result for the reference year 2012 and the preliminary results for the reference years 2013 and 2014, and is scheduled to be published by the end of March 2016. To ensure that future TSAs in South Africa are responsive to user needs and provide an accurate reflection of the tourism industry as well as its role in the economy, all stakeholders are invited to send comments to: RiaanG@statssa.gov.za.

Annexures

Annexure A: Tourism-characteristic products

The list of tourism-characteristic products (goods and services) corresponds with products (goods and services) considered characteristic for purposes of the international comparability of results. Consequently, it is meant to serve as a proposal of how, in future, the various international organisations could present, in a comparable way, the results of countries that have developed a TSA.

In coding the various items, six-digit codes, with a point between the fifth and sixth digits, were used. The first five digits correspond to the Central Product Classification (CPC), Version 2.0 code, and the sixth digit is used exclusively for the present list. If the sixth digit is a zero, it means that this item is the same as the one presented in the CPC, Version 2.0 and has been drawn from it, but if the sixth digit is not a zero, the item corresponds only partly to the CPC code. For example, code 63110.0, 'Hotel and motel lodging services', is identical to CPC code 63110, whereas code 63199.1, 'Sleeping-car....', corresponds only in part to CPC code 63199.

1. Accommodation services

1.1 Hotels and other lodging services

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

1.2 Second-home services on own account or for free

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

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

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

3. Passenger transport services

3.1 Inter-urban railway transport services

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

3.2 Road transport services

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

3.3 Water transport services

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

3.4 Air transport services

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

3.5 Supporting passenger transport services

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

3.6 Passenger transport equipment rental

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

3.7 Maintenance and repair services of passenger transport equipment

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

4. Travel agency, tour operator and tourist guide services

4.1 Travel agency services

67811.0	Travel agency services
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4.2 Tour operator services

67812.0	Tour operator services
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4.3 Tourist information and tourist guide services

67813.0	Tourist information services
67820.0	Tourist guide services

5. Cultural services

5.1 Performing arts

96230.0	Performing arts facility operation services
96310.0	Services of performing artists

5.2 Museum and other cultural services

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

6. Recreation and other entertainment services

6.1 Sports and recreational services

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

6.2 Other amusement and recreational services

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

7. Miscellaneous tourism services

7.1 Financial and insurance services

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

7.2 Other rental services

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

7.3 Other tourism services

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

Annexure B: List of tourism-characteristic activities

Tourism-characteristic activities can be identified as those productive activities whose principal output is characteristic of tourism. As the set of these activities does not comprise a single industry conforming to the SNA definition, the TSA defines tourism industries as all establishments whose principal productive activity is a tourism-characteristic activity.

Table A reveals similarities between the 12 items of the list used in the TSA tables and their corresponding codes in the International Standard Industrial Classification of all Economic Activities (ISIC), Rev. 3 and SICTA.

Table A: List of tourism-characteristic activities

Activity description	ISIC, Rev. 3	SICTA
1. Hotels and similar	5510	5510
2. Second - home ownership (imputed)	Part of 7010	Part of 7010
3. Restaurants and similar	5520	5520
4. Railway passenger transport services	Part of 6010	6010-1, 6010-2
5. Road passenger transport services	Part of (6021 and 6022)	6021-1, 6021-2, 6021-3, 6022-1, 6022-2, 6022-3, 6022-4
6. Water passenger transport services	Part of (6110 and 6120)	6110-1, 6110-2, Part of 6110, 6120-1, 6120-2, 6120-3, Part of 6120
7. Air passenger transport services	Part of (6210 and 6220)	6210-1, 6220-1, 6220-2
8. Transport supporting services	Part of 6303	6303-1, 6303-2, 6303-3
9. Transport equipment rental	Part of (7111, 7112 and 7113)	7111-1, 7111-2, 7111-3 Part of 7112, 7113-1
10. Travel agencies and similar	6304	6304
11. Cultural services	9232, 9233	9232-1, 9232-2, 9233-1, 9233-2
12. Sporting and other recreational services	Part of 9214 Part of 9241 Part of 9219 Part of 9249	Part of 9214 Part of 9241 9219-1 Part of 9249

Annexure C: Tourism Satellite Account non-monetary indicators

Table 10 of the TSA presents a few quantitative non-monetary indicators, which are important for the interpretation of the monetary information presented. The 1993 SNA states explicitly that physical indicators are an important component of satellite accounts and therefore should be viewed as a secondary part of the TSA²¹. The UNWTO, however, states that further work would be required to improve the link between the provisional list of non-monetary indicators and the monetary tables.

Table B1: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2011 (million)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Same-day		Total visitors	Same-day		Total visitors	Same-day		Total visitors
	Tourists	visitors		Tourists	visitors		Tourists	visitors	
Number of trips or visits (*)	-	-	-	26 405	274 522	300 927	-	-	-
Number of bednights	-	-	-	-	-	-	-	-	-

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

Table B2: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2012 (million)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Same-day		Total visitors	Same-day		Total visitors	Same-day		Total visitors
	Tourists	visitors		Tourists	visitors		Tourists	visitors	
Number of trips or visits (*)	-	-	-	25 438	324 750	350 188	-	-	-
Number of bednights	-	-	-	-	-	-	-	-	-

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

Table B3: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2013 (million)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Same-day		Total visitors	Same-day		Total visitors	Same-day		Total visitors
	Tourists	visitors		Tourists	visitors		Tourists	visitors	
Number of trips or visits (*)	-	-	-	25 175	253 466	278 641	-	-	-
Number of bednights	-	-	-	-	-	-	-	-	-

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

²¹ TSA: RMF

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

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

Table D1: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2011

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 670	7 161	-	-
Capacity (stay units)	59 400	56 400	-	-
Stay unit nights sold	11 080 200	8 056 900	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	51,1%	48,8%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D2: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2012

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 657	7 103	-	-
Capacity (stay units)	59 700	58 000	-	-
Stay unit nights sold	11 711 600	8 785 800	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	53,6%	50,4%	-	-
Capacity utilisation (beds)	-	-	-	-

Table D3: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2013

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 651	7 032	-	-
Capacity (stay units)	60 000	58 600	-	-
Stay unit nights sold	12 204 200	9 359 500	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	55,8%	51,5%	-	-
Capacity utilisation (beds)	-	-	-	-

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

	1-4	5-9	10-19	20-49	59-99	100-249	250-499	500-999	>1000	Total
1 – Accommodation for visitors										
1.a – Accommodation services for visitors other than 1.b										
1.b – Accommodation services associated with all types of vacation home ownership										
2 – Food and beverage serving industry										
3 – Railway passenger transport										
4 – Road passenger transport										
5 – Water passenger transport										
6 – Air passenger transport										
7 – Transport equipment rental										
8 – Travel agencies and other reservation services										
9 – Cultural industry										
10 – Sports and recreational industry										
11 – Retail trade of country-specific tourism characteristic goods										
12 – Country-specific tourism industries										
Total establishments										

Glossary

Domestic tourism	The tourism of resident visitors within the economic territory of the country of reference.
Domestic tourism consumption	Domestic tourism consumption is the consumption of domestic tourism; that is, the consumption incurred as a direct result of resident visitors travelling within their country of residence. These purchases might include goods or even services produced abroad or by non-residents but sold within the domestic economy (imported goods and services).
Household final consumption expenditure	Household final consumption expenditure includes all consumption expenditure made by households from their own cash resources (including all income in cash received), as well as all the counterpart of income in kind (except social transfers in kind) that households might have received, such as remuneration in kind and other transfers in kind. It also includes the value of all consumption of output for own final use, such as those provided by second homes on own account used for tourism purposes or what it can have received through barter transactions.
Inbound tourism	Inbound tourism comprises the tourism of non-resident visitors within the economic territory of the country of reference.
Inbound tourism consumption	Inbound tourism consumption is the consumption of inbound tourism; that is, the consumption incurred as a direct result of non-resident visitors travelling to and within the given country. It is limited to purchases from providers resident in the given country. The goods purchased within the given country might have been imported by the given country.
Internal tourism	Internal tourism comprises the tourism of visitors, both resident and non-resident, within the economic territory of the country of reference. Internal tourism comprises domestic tourism and inbound tourism.
Internal tourism consumption	Internal tourism consumption is the consumption of internal tourism; that is, it comprises all consumption expenditure of visitors both resident and non-resident visiting the given country (compiling economy). It is the sum of domestic tourism consumption and inbound tourism consumption. It might include goods and services imported into the country and domestically sold to visitors.
International tourism	International tourism comprises inbound tourism and outbound tourism.

International tourism consumption	International tourism consumption comprises inbound tourism consumption and outbound tourism consumption.
National tourism	National tourism comprises the tourism of resident visitors, within and outside the economic territory of the country of reference. National tourism is the tourism by residents; that is, it comprises domestic tourism and outbound tourism.
National tourism consumption	National tourism consumption comprises all tourism consumption by resident visitors regardless of where it occurs. It includes all domestic tourism consumption and outbound tourism consumption by residents of the given country (compiling economy). These purchases may include nationally produced goods and services, imported goods purchased from resident providers, and goods and services purchased from non-resident providers, such as in countries visited.
Outbound tourism	Outbound tourism comprises the tourism of resident visitors outside the economic territory of the country of reference.
Outbound tourism consumption	Outbound tourism consumption is the consumption of outbound tourism; that is, the consumption incurred as a direct result of residents travelling to countries other than the one in which they reside. While most of this consumption happens outside the given country (compiling economy), such purchases might include goods and services produced in the visitor's country of residence and acquired for the trip. Purchases of international transportation are included in their entirety regardless of the residence of the carrier.
Tourism	Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.
Tourism-characteristic activities	Tourism-characteristic activities are those productive activities that have tourism-characteristic products as their principal output. The sum of all tourism-characteristic activities comprises the tourism industries.
Tourism-characteristic products	Tourism-characteristic products are those which, in most countries, would cease to exist in meaningful quantity or those of which the consumption would be significantly reduced in the absence of tourism, and for which statistical information seems possible to obtain.
Tourism-connected products	Tourism-connected products are those products which are consumed by visitors in volumes which are significant for the visitor and/or the provider but which are not included in the list of tourism-characteristic products.
Tourism-connected activities	Tourism-connected activities are those productive activities having as their principal output tourism-connected products.

Tourism consumption	Tourism consumption is the total consumption expenditure made by a visitor or on behalf of a visitor for and during his/her trip and stay at their destination.
Tourism demand	Tourism demand is the sum of the tourism consumption, the tourism collective consumption and tourism gross fixed capital formation.
Tourism expenditure	Tourism expenditure is the acquisition of goods and services by visitors or by others for their benefit through a monetary transaction for the direct satisfaction of their wants and needs for and during their stay at their destination.
Tourism gross domestic product	Tourism GDP is the GDP generated in the economy by the tourism industries and other industries in response to tourism internal consumption.
Tourism industry	A tourism industry consists of a set of establishments whose principal productive activity is a tourism-characteristic activity.
Tourism internal consumption	Tourism internal consumption comprises all tourism consumption expenditure that takes place within the given country (compiling economy). It includes all domestic tourism consumption, inbound tourism consumption, and the part of outbound tourism consumption which corresponds to goods and services provided by residents. It might include goods and services imported into the economy and domestically sold to visitors. It differs from internal tourism consumption by the part of outbound tourism consumption which corresponds to goods and services provided by residents.
Tourism non-specific products	Tourism non-specific products are all other products which are not tourism-specific.
Tourism sector	The tourism sector consists of the set of institutional units whose principal economic activity is a tourism-characteristic activity. These units might belong to the following institutional sectors: households, non-financial corporations (private, foreign owned, publicly owned), financial corporations, general government or non-profit institutions serving households.
Tourism-specific products	Tourism-specific products consist of the set of tourism-characteristic products and tourism-connected products.
Tourism value added	Tourism value added is defined as the value added generated in the economy by the tourism industries and other industries in response to tourism internal consumption.

Traveller	A traveller is any person on a trip between two or more countries, or between two or more localities within his/her country of usual residence.
Usual environment	To be outside the 'usual environment' the person should travel more than 40 kilometres from his/her place of residence (one way) AND the place should NOT be visited more than once a week. This includes place of work and place of study. Leisure and recreational trips are included irrespective of frequency.
Visitor	A visitor is any person travelling to a place other than that of his usual environment for less than 12 months and whose main purpose of the trip is other than the exercise of an activity remunerated from within the place visited.
Visitors' expenditures	Visitors' expenditures are traditionally used in the analysis of tourism economy. They include expenditures on goods and services consumed by visitors for and during their trips and stay at destinations. It corresponds with the monetary transactions component of tourism consumption.

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