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Tourism Satellite Account for South Africa, provisional 2010

Report No.: 04-05-07

March 2012



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Tourism Satellite Account for South Africa, provisional 2010

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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), provisional 2010 covers provisional figures for the reference year 2010. 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 in terms of expenditure and employment.

The TSA for South Africa is compiled and published by Statistics South Africa (Stats SA) according to the Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF) developed by the United Nations World Tourism Organization (UNWTO). The TSA is one element of a System of Tourism Statistics (STS) that provides information for the understanding and monitoring of the impact of tourism on the South African economy over time. 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.

Key findings

Tourism direct gross domestic product was R80 249 million (or 3,0% of total gross domestic product) for 2010, R68 831 million (or 2,9% of total gross domestic product) for 2009, R67 199 million (or 3,0% of total gross domestic product) in 2008 and R59 781 million (or 3,0% of total gross domestic product) in 2007.

The year 2010 saw 11 303 087 foreign visitors to South Africa compared with 9 531 615 foreign visitors and 9 407 314 foreign visitors in 2009 and 2008 respectively.

There were 567 378 persons (or 4,3% of total employment) directly engaged in producing goods and services purchased by tourists in 2010, 547 934 persons (or 4,1% of total employment) in 2009, 609 021 persons (or 4,4% of total employment) in 2008 and 569 688 (or 4,2% of total employment) in 2007.

Inbound tourism expenditure totalling R69 422 million was recorded in 2010. The main expenditure items were 'non-specific products' (19,6%), 'accommodation for visitors' (17,9%), 'road passenger transport services' (13,7%) and 'tourism connected products' (12,9%). **Inbound tourism expenditure** totalling R67 141 million was recorded in 2009. The main expenditure items were 'non-specific products' (26,4%), 'accommodation for visitors' (15,7%), 'road passenger transport services' (13,1%) and 'connected products' (12,7%).

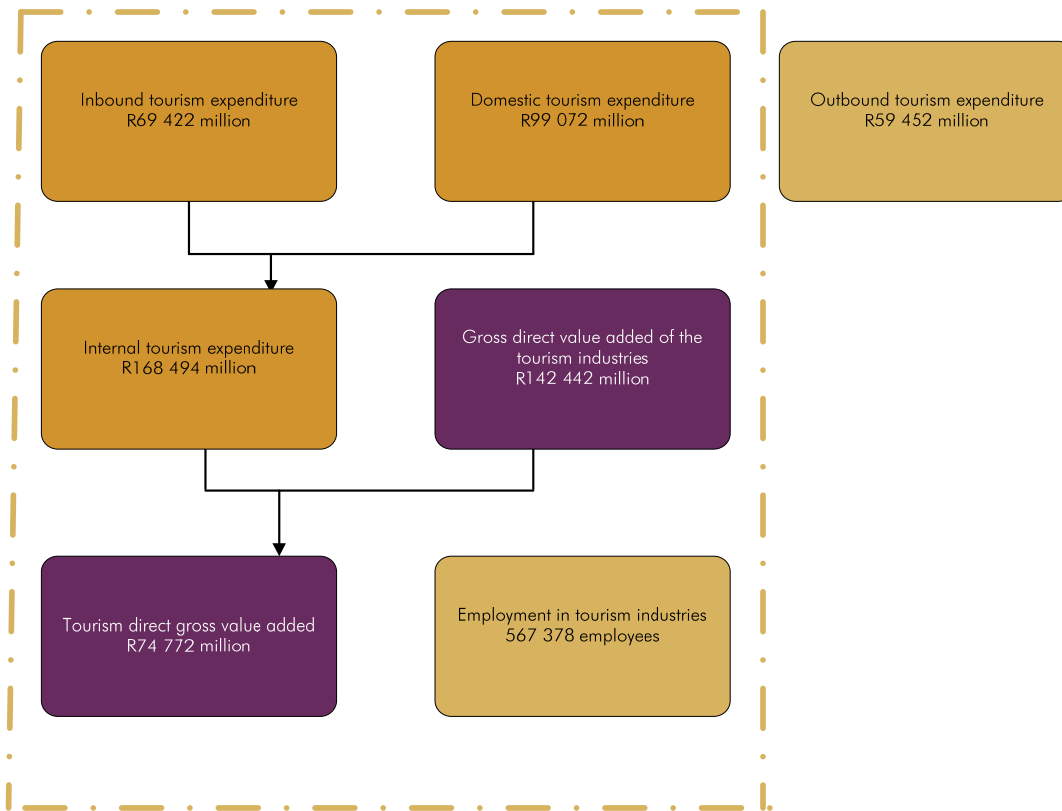
Domestic tourism expenditure totalling R99 072 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2010. The main expenditure items were 'road passenger transport services' (29,9%), 'accommodation for visitors' (22,9%), 'air passenger transport services' (12,9%) and 'non-specific products' (10,3%). **Domestic tourism expenditure** totalling R81 873 million (including the *domestic portion of outbound tourism expenditure*) was recorded in 2009. The main expenditure items were 'road passenger transport services' (32,4%), 'accommodation for visitors' (19,2%), 'air passenger transport services' (13,3%) and 'non-specific products' (11,8%).

The total **internal tourism consumption in cash** for South Africa in 2010 was R168 494 million (inbound tourism consumption R69 422 million (41,2%) and domestic tourism consumption R99 072 million (58,8%)). The main expenditure items for internal tourism were 'road passenger transport services' (23,2%), 'accommodation for visitors' (20,8%), 'non-specific products' (14,2%) and 'tourism connected products' (10,1%).

The total **internal tourism consumption in cash** for South Africa in 2009 was R149 014 million (inbound tourism consumption R67 141 million (45,1%) and domestic tourism consumption R81 873 million (54,9%)). The main expenditure items for internal tourism were 'road passenger transport services' (23,7%), 'non-specific products' (18,4%), 'accommodation for visitors' (17,6%) and 'tourism connected products' (10,8%).

	2007 (final)	2008 (provisional)	2009 (provisional)	2010 (provisional)
Inbound tourism expenditure (R million)	66 655	69 964	67 141	69 422
Domestic tourism expenditure (R million)	67 612	76 545	81 873	99 072
Internal tourism expenditure (R million)	134 267	146 509	149 014	168 494
Tourism direct gross value added (TDGVA) (R million)	54 851	62 155	63 911	74 772
Tourism direct gross value added (TDGVA) (%)	3,1	3,1	2,9	3,1
Tourism direct gross domestic product (TDGDP) (R million)	59 781	67 199	68 831	80 249
Tourism direct gross domestic product (TDGDP) (%)	3,0	3,0	2,9	3,0
Number of persons directly engaged in producing goods and services purchased by tourists	569 688	609 021	547 934	567 378
Persons directly engaged in producing goods and services purchased by tourists (%)	4,2	4,4	4,1	4,3

Figure 1: Flow of tourism expenditure through the South African economy, 2010



The 2010 FIFA World Cup™ in South Africa

South Africa became the first African country to host the 2010 FIFA World Cup™ from 11 June to 11 July 2010. The World Cup took place in eight of South Africa's nine provinces, using 10 stadiums in nine host cities. Johannesburg was the only city with two venues for the 2010 FIFA World Cup™, namely Soccer City and Ellis Park. Other host cities were Cape Town, Pretoria, Durban, Port Elizabeth, Polokwane, Nelspruit, Bloemfontein and Rustenburg.

According to research by Grant Thornton before the 2010 FIFA World Cup™, the firm estimated that some 483 250 tourists will spend around R8 500 million during their stay in South Africa. In a study conducted by South African Tourism (SAT) on the overall impact of the 2010 FIFA World Cup™ in South Africa, it is stated that a total of 309 554 inbound tourists arrived in South Africa for the primary purpose of attending the 2010 FIFA Soccer World Cup. SAT estimated the total expenditure in South Africa by these tourists who came specifically for the 2010 FIFA World Cup at R3 640 million. The majority of these tourist arrivals were from Europe, followed by African Land Markets and Central and South America. 'Shopping' and 'enjoying the nightlife' were the two most common activities which tourists engaged in apart from 'watching the 2010 FIFA World Cup™'. The tourists indicated that of the total money spent in South Africa during their stay for the 2010 FIFA World Cup, the biggest expenditure item was shopping (31%), followed by paid accommodation (20%), food and beverages (19%) and leisure (16%).

According to FIFA, a total of 3 100 000 spectators attended the 64 matches of the 2010 FIFA World Cup™ in South Africa.

Chapter 1: Introduction

The United Nations World Tourism Organization (UNWTO) defines tourism as 'the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited'. During the last decades, tourism has become an important economic and social activity in the national and global economy. However, statistical information on the nature, progress and consequences of tourism in South Africa 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 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 of the economic importance of this activity among players directly and indirectly involved in tourism; 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 1993 System of National Accounts

The TSA brings together the diverse aspects of tourism by providing a tourism dimension to the framework of the 1993 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 is 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:

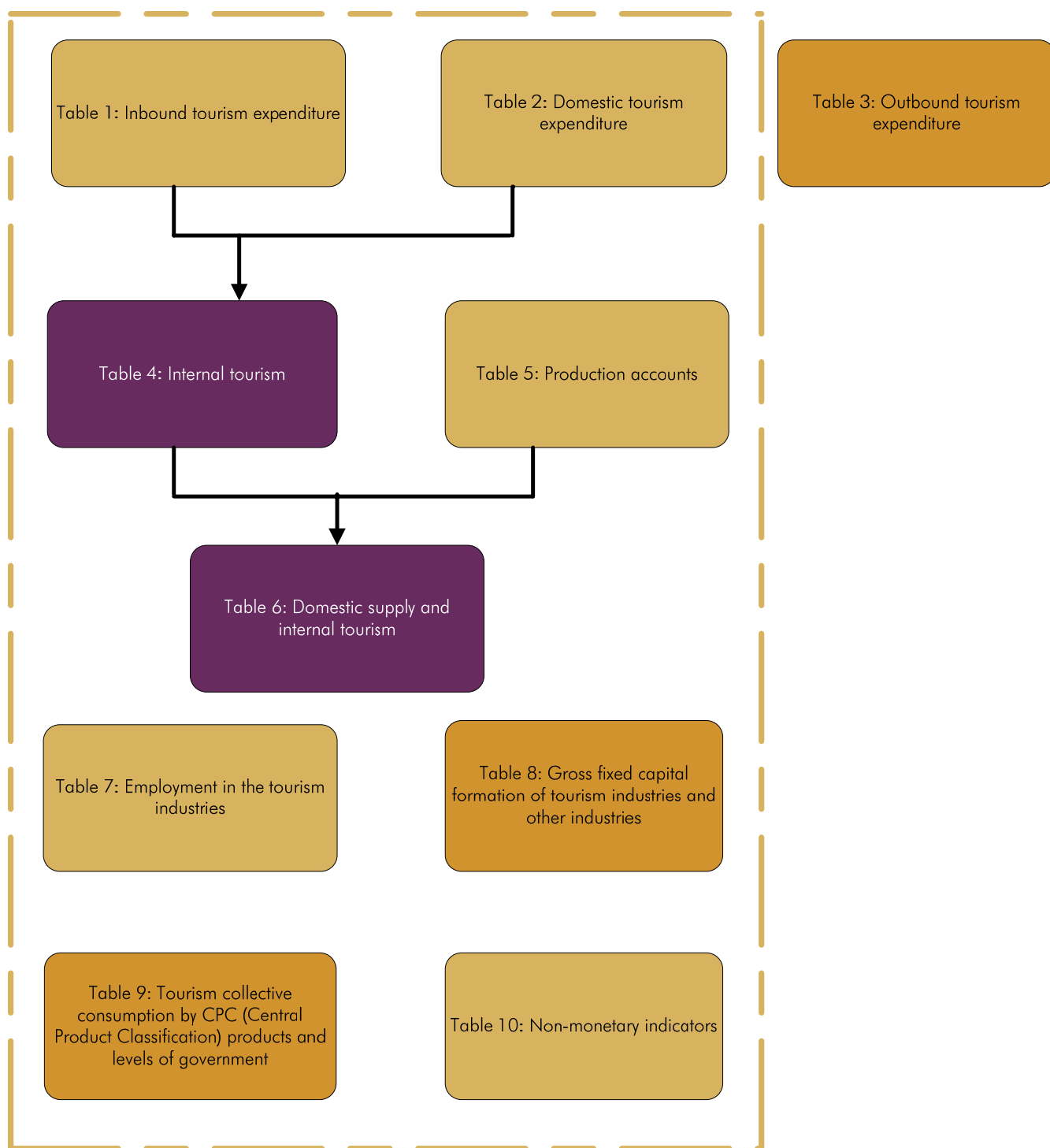
- A statistical instrument used to measure the size of the tourism sector's contribution to the economy of a country according to international standards of concepts, classifications and definitions which will allow for valid comparisons with other industries and, eventually, between individual countries 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 of goods and services generated by tourism on the one hand, and their supply on the other hand, and as such provides a framework for policy analysis of issues related to tourism economics, as well as for model-building, tourism growth analysis and productivity measurements. For South Africa, the TSA will provide a measure of the importance of tourism in terms of gross domestic product (GDP), 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 abovementioned variables). The TSA for South Africa, provisional 2010 provides a coherent framework 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.

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

Figure 2: 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).

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 that '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 household surveys). Table 1 shows a list of the datasets that is published by Stats SA, and which was used for the compilation of the TSA for South Africa.

³ TSA: RMF

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	March 2012 (reference period–December 2011)	Monthly and annually	Movement control system from DHA
General Household Survey (GHS)	Yes	March 2012 (reference period–2011)	Annually	25 653 households
Income and Expenditure Survey (IES)	Yes	March 2008 (reference period–2005)	Every 5 years	30 000 households
Domestic Tourism Survey (DTS)	No	March 2012 (reference period–2010)	Annually	31 027 households
SU-tables	Yes	Reference period 2010 (10x10)	Annually	Entire economy
		Reference period 2010 (64x104)	Annually	
		Reference period 2005 (171x104)	Periodically	
Financial statistics of consolidated general government	Yes	November 2011 (reference period–2009/2010)	Annually	General government
Tourist accommodation survey	Yes	March 2012 (reference period–January 2012)	Monthly	1 000 enterprises sampled

⁴ Correct in March 2012

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
Survey of food and beverages	Yes	March 2012 (reference period–January 2012))	Monthly	900 enterprises sampled
Large sample survey (LSS) on accommodation	Yes	December 2010 (reference period–2009)	Every 3 years	2 000 enterprises sampled
LSS on personal services	Yes	August 2010 (reference period–2008)	Every 3 years	4 277 enterprises sampled
LSS on the transport industry	Yes	November 2011 (reference period–2010)	Every 3 years	2 100 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	September/October 2011 (reference period–2009)	Every 3 years	Wholesale: 3 100 enterprises sampled Retail: 3 000 enterprises sampled
Annual Financial Statistics (AFS) ⁵	Yes	October 2011 (reference period–2010)	Annually	14 372 enterprises sampled
SU-tables	Yes	Reference period 2010 (10x10)	Annually	Entire economy
		Reference period 2010 (64x104)	Annually	
		Reference period 2005 (171x104)	Periodically	

Source: Statistics South Africa

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

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.

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	2011	44 400 people
Domestic survey	Monthly	2011	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 these tables can be extended to satellite accounts (accounts linking the 1993 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, satellite accounting must be used.

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 1993 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 of 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.

⁶ Compiled quarterly with a lag of a quarter

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 conceptual and methodological differences exist between the tourism foreign direct spend (TFDS) published by SAT, the BoP as compiled by 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 SARB, but excludes the domestic spending of seasonal and non-resident workers.

Chapter 3: Tourism Satellite Account for South Africa, provisional 2010⁹

This chapter reviews the results of the TSA for South Africa for the reference year 2010 (provisional).

3.1 Flow of expenditure through the South African economy

Tourism is a fast-growing industry which is recognised by the South African government for the role it plays in economic growth and poverty reduction. Tourism plays a significant role in influencing economies' 'generation of value added, employment, personal income and government income'¹⁰. Tourism is also one of the two sectors which were identified as special priority in the Accelerated and Shared Growth Initiative for South Africa (AsgiSA). The importance of tourism to both developing and developed nations has created a need to measure its economic and social impact.

3.2 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 destination¹¹. Table 3 shows tourism expenditure by product for South Africa for the reference year 2010.

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 tourists).

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 tourists. A product is classified as a tourism-characteristic product if at least 25% of its production is purchased by tourists (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 tourists consume a smaller proportion of the total supply of the product. For a product to be classified as a tourism-related product, tourists must purchase more than 0% and less than 25% 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-specific¹² product.

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

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

⁹ Annexure C shows the prescribed format of Tables 1 to 7 and Table 10 of the TSA

¹⁰ TSA: RMF

¹¹ TSA: RMF

¹² A tourism-specific product is either a tourism-characteristic product or a tourism-related product

Table 3: Tourism expenditure by product, South Africa, 2010

Product	Domestic demand (1)	International demand (exports) (2)	Total demand (3) = (1)+(2)	Total domestic supply (4)	Tourism product ratio* (5) = (3)/(4)	Tourism spending abroad (imports) (6)
	R million				Percentage	R million
Characteristic products	80 765	46 867	127 631	245 927	51,9	-
Accommodation services	22 709	12 421	35 130	36 880	95,3	-
Restaurants and similar	6 561	8 296	14 856	41 344	35,9	-
Passenger transport services	44 561	19 107	63 668	136 038	46,8	
Railway passenger transportation services	226	91	317	4 558	7,0	-
Road passenger transportation services	29 578	9 543	39 121	104 971	37,3	-
Water passenger transportation services	7	2	9	17	53,7	-
Air passenger transportation services	12 791	8 375	21 167	21 925	96,5	-
Transport equipment rental	1 959	1 096	3 055	4 568	66,9	-
Travel agencies and similar	4 361	1 833	6 194	6 320	98,0	-
Cultural services	124	141	265	1 267	20,9	-
Sport and recreational services	2 449	5 069	7 518	24 078	31,2	-
Connected products	8 088	8 931	17 019	186 658	9,1	
Retail sales of food, beverages and tobacco	4 597	4 978	9 576	94 148	10,2	-
Retail sales of textiles, clothing, footwear and leather goods	1 768	2 313	4 080	42 906	9,5	-
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	66	95	161	14 150	1,1	-
Retail sales of household furniture, appliances, articles and equipment	143	856	999	21 681	4,6	-
Retail sales of automotive fuel	1 515	689	2 204	13 772	16,0	-
Non-specific products	10 219	13 625	23 844	5 030 220	0,5	
Services	4 492	3 542	8 034	3 173 882	0,3	-
Goods	5 727	10 082	15 809	1 856 337	0,9	-
Total tourism expenditures	99 072	69 422	168 494	5 462 805	3,1	59 452

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

3.2.1 Inbound tourism expenditure

Table 4 and Table 5 show inbound tourism expenditure by type of product (R million and percentage contribution). The year 2010 saw 11 303 087 foreign visitors to South Africa compared with 9 531 615 foreign visitors and 9 407 314 foreign visitors in 2009 and 2008 respectively.

Inbound tourism expenditure totalling R69 422 million was recorded in 2010. The main expenditure items were 'non-specific products' (19,6%), 'accommodation for visitors' (17,9%), 'road passenger transport services' (13,7%) and 'tourism connected products' (12,9%). Inbound tourism expenditure totalling R67 141 million was recorded in 2009. The main expenditure items were 'non-specific products' (26,4%), 'accommodation for visitors' (15,7%), 'road passenger transport services' (13,1%) and 'connected products' (12,7%).

Table 4: Inbound tourism expenditure by type of product, 2010 (R million)

Tourism product	2010
Accommodation for visitors	12 421
Restaurants and similar services	8 296
Railway passenger transport services	91
Road passenger transport services	9 543
Water passenger transport services	2
Air passenger transport services	8 375
Transport equipment rental	1 096
Travel agencies and other reservation services	1 833
Cultural services	141
Sport and recreational services	5 069
Tourism-connected products	8 931
Non-specific products	13 625
Total	69 422

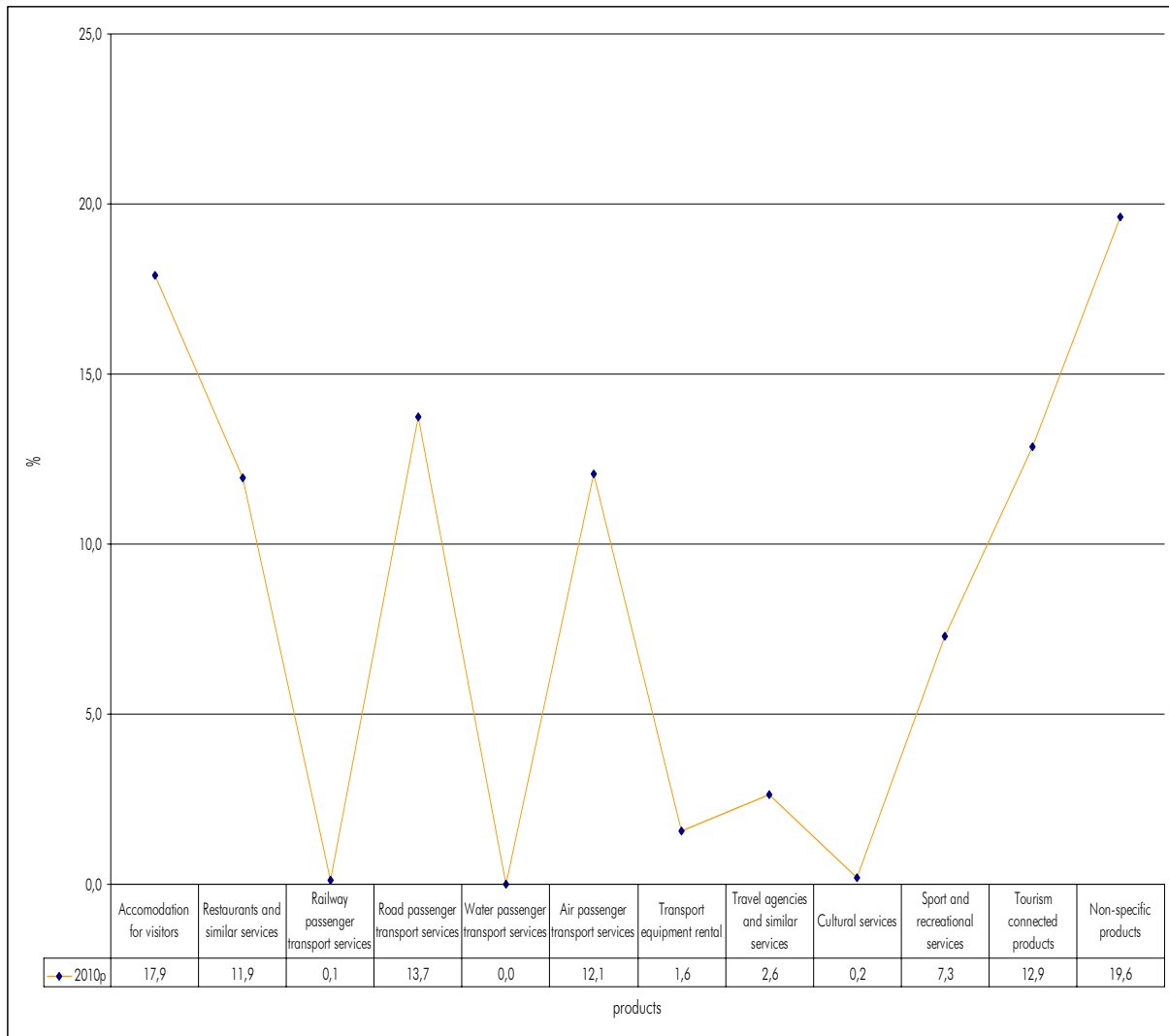
**Individual figures may not add up to stated totals due to rounding

Table 5: Inbound tourism expenditure by type of product, 2010 (%)

Tourism product	2010
Accommodation for visitors	17,9
Restaurants and similar services	11,9
Railway passenger transport services	0,1
Road passenger transport services	13,7
Water passenger transport services	0,0
Air passenger transport services	12,1
Transport equipment rental	1,6
Travel agencies and other reservation services	2,6
Cultural services	0,2
Sport and recreational services	7,3
Tourism-connected products	12,9
Non-specific products	19,6
Total	100,0

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

Figure 3: Inbound tourism expenditure by type of product, 2010 (%)



Source: Statistics South Africa

3.2.2 Domestic tourism expenditure

Table 6 and Table 7 show domestic tourism expenditure by type of product (R million and percentage contribution).

Domestic tourism expenditure totalling R99 072 million (including the domestic portion of outbound tourism expenditure) was recorded in 2010. The main expenditure items were 'road passenger transport services' (29,9%), 'accommodation for visitors' (22,9%), 'air passenger transport services' (12,9%) and 'non-specific products' (10,3%). Domestic tourism expenditure totalling R81 873 million (including the domestic portion of outbound tourism expenditure) was recorded in 2009. The main expenditure items were 'road passenger transport services' (32,4%), 'accommodation for visitors' (19,2%), 'air passenger transport services' (13,3%) and 'non-specific products' (11,8%).

Table 6: Domestic tourism expenditure by type of product, 2010 (R million)

Tourism product	2010
Accommodation for visitors	22 709
Restaurants and similar services	6 561
Railway passenger transport services	226
Road passenger transport services	29 578
Water passenger transport services	7
Air passenger transport services	12 791
Transport equipment rental	1 959
Travel agencies and other reservation services	4 361
Cultural services	124
Sport and recreational services	2 449
Tourism-connected products	8 088
Non-specific products	10 219
Total	99 072

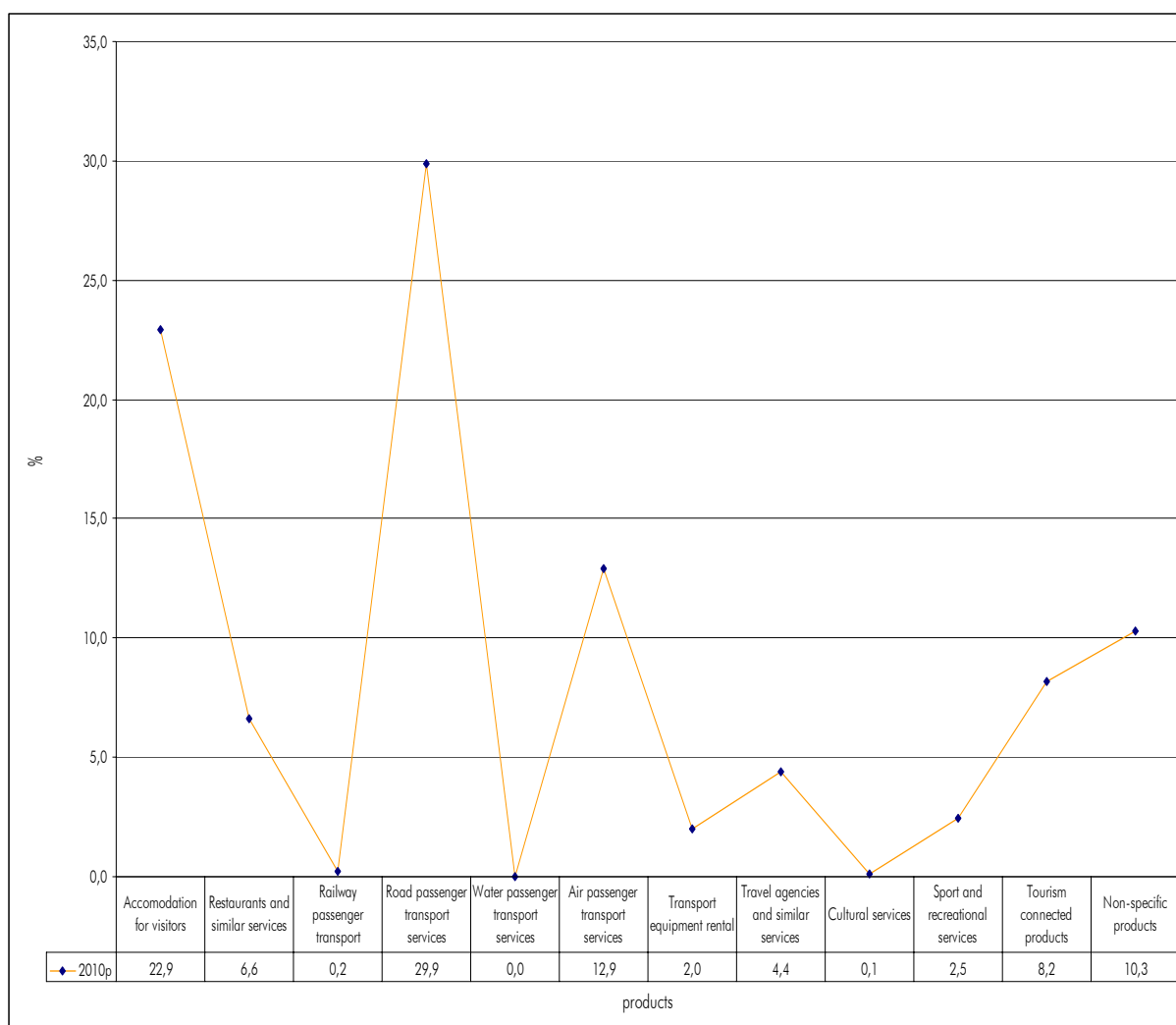
**Individual figures may not add up to stated totals due to rounding

Table 7: Domestic tourism expenditure by type of product, 2010 (%)

Tourism product	2010
Accommodation for visitors	22,9
Restaurants and similar services	6,6
Railway passenger transport services	0,2
Road passenger transport services	29,9
Water passenger transport services	0,0
Air passenger transport services	12,9
Transport equipment rental	2,0
Travel agencies and other reservation services	4,4
Cultural services	0,1
Sport and recreational services	2,5
Tourism-connected products	8,2
Non-specific products	10,3
Total	100,0

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

Figure 4: Domestic tourism expenditure by type of product, 2010 (%)



Source: Statistics South Africa

3.2.3. Internal tourism expenditure

Table 8 and Table 9 show internal tourism expenditure by type of product (goods and services).

The total internal tourism consumption in cash for South Africa in 2010 was R168 494 million (inbound tourism consumption R69 422 million (41,2%) and domestic tourism consumption R99 072 million (58,8%)). The main expenditure items for internal tourism were 'road passenger transport services' (23,2%), 'accommodation for visitors' (20,8%), 'non-specific products' (14,2%) and 'tourism connected products' (10,1%).

The total internal tourism consumption in cash for South Africa in 2009 was R149 014 million (inbound tourism consumption R67 141 million (45,1%) and domestic tourism consumption R81 873 million (54,9%)). The main expenditure items for internal tourism were 'road passenger transport services' (23,7%), 'non-specific products' (18,4%), 'accommodation for visitors' (17,6%) and 'tourism connected products' (10,8%).

Table 8: Internal tourism expenditure by type of product, 2010 (R million)

Tourism product	2010
Accommodation for visitors	35 130
Restaurants and similar services	14 856
Railway passenger transport services	317
Road passenger transport services	39 121
Water passenger transport services	9
Air passenger transport services	21 167
Transport equipment rental	3 055
Travel agencies and other reservation services	6 194
Cultural services	265
Sports and recreational services	7 518
Tourism-connected products	17 019
Non-specific products	23 844
Total	168 494

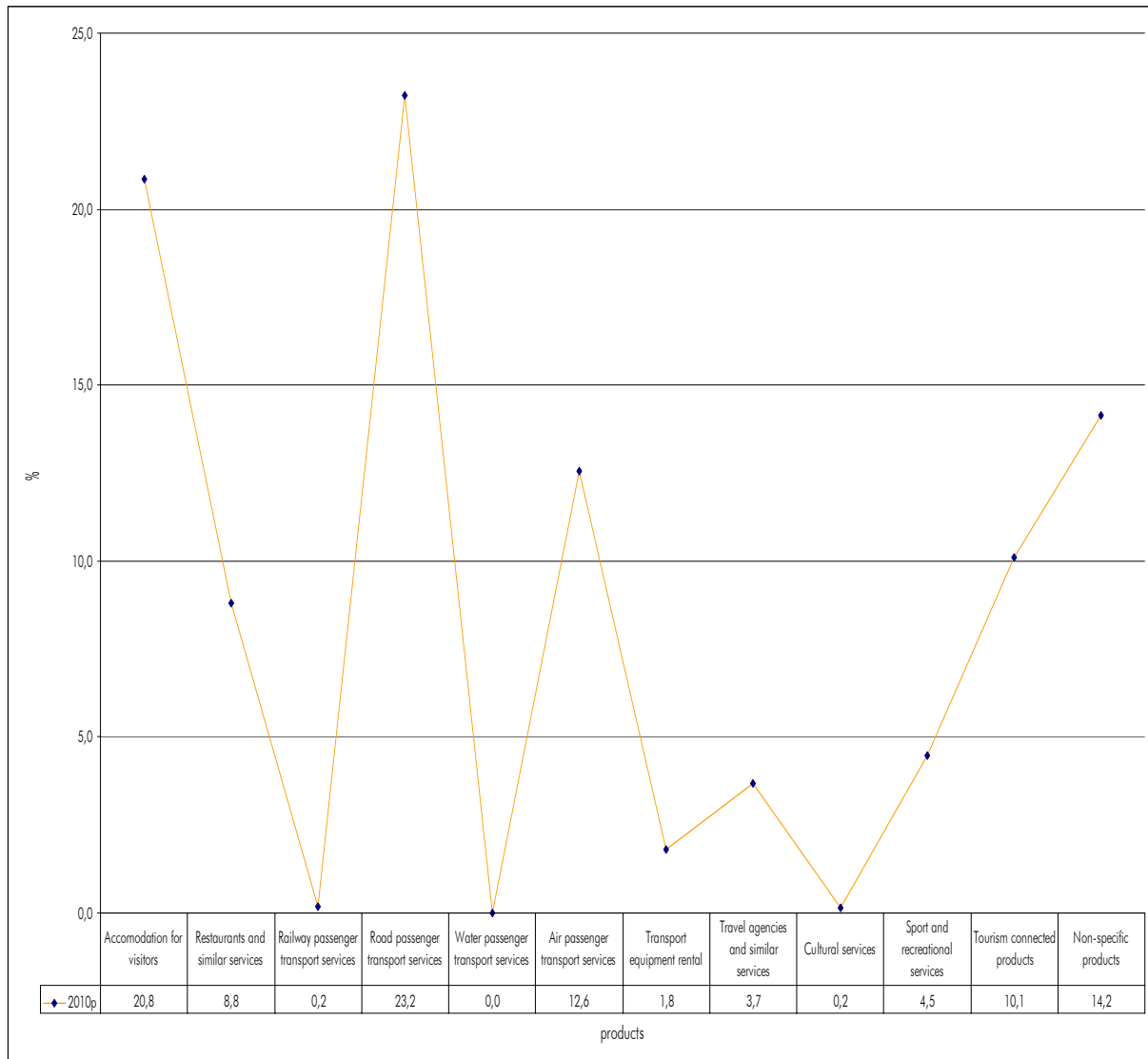
**Individual figures may not add up to stated totals due to rounding

Table 9: Internal tourism expenditure by type of product, 2010 (%)

Tourism product	2010
Accommodation for visitors	20,8
Restaurants and similar services	8,8
Railway passenger transport services	0,2
Road passenger transport services	23,2
Water passenger transport services	0,0
Air passenger transport services	12,6
Transport equipment rental	1,8
Travel agencies and other reservation services	3,7
Cultural services	0,2
Sports and recreational services	4,5
Tourism-connected products	10,1
Non-specific products	14,2
Total	100,0

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

Figure 5: Internal tourism expenditure by type of product, 2010 (%)



Source: Statistics South Africa

3.3 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 1993 SNA, but the perspective is different from that of the 1993 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 correspond necessarily to the corresponding values found in the national accounts of the country¹³. 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 accounts¹⁴.

Table 10 shows the production accounts for the tourism industries and other for 2010. 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 R142 443 (or 5,9% of total GVA generated) in 2010.

Table 10: Production accounts of the tourism industries and other industries (at basic prices), 2010 (R million)

Product	Tourism-characteristic industries	Tourism-related industries	Other non-tourism industries	Total output of domestic producers (at basic prices)
A. Specific products	232 620	70 317	129 649	432 585
A.1 Characteristic products	232 620		13 308	245 927
1. Accommodation services	36 880			36 880
1.1 Hotel and other accommodation for visitors other than 1.2	36 880			36 880
1.2 Accommodation services associated with all types of vacation home ownership	-		-	
2. Restaurants and similar services	31 490		9 854	41 344
3. Passenger transport services	132 584		3 454	136 038
3.1 Railway passenger transport services	4 558			4 558
3.2 Road passenger transport services	101 517		3 454	104 971
3.3 Water passenger transport services	17			17
3.4 Air passenger transport services	21 925			21 925
3.5 Passenger transport equipment rental	4 568			4 568
4. Travel agencies and other reservation services	6 320			6 320
5. Cultural industry	1 267			1 267
6. Sport and recreational industry	24 078			24 078
A.2 Connected products		70 317	116 341	186 658
Retail sales of food, beverages and tobacco		27 110	67 038	94 148
Retail sales of textiles, clothing, footwear and leather products		10 727	32 180	42 906
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles		9 732	4 418	14 150
Retail sales of household furniture, appliances, articles and equipment		14 372	7 309	21 681
Retail sales of automotive fuel		8 376	5 396	13 772
B. Non-specific products	3 101	6 646	5 020 473	5 030 220
Services	1 597	6 646	3 165 639	3 173 882
Goods	1 503		1 854 834	1 856 337
Total output (at basic prices)	235 720	76 963	5 150 122	5 462 805
Total intermediate consumption (at purchasers' price)	131 427	38 813	2 880 073	3 050 314
Total gross value added (at basic prices)	104 293	38 150	2 270 049	2 412 491
Compensation of employees	30 773	24 007	1 147 212	1 201 992
Taxes less subsidies on production	798	825	36 112	37 735
Gross operating surplus	72 723	13 318	1 086 723	1 172 764

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

¹³ TSA: RMF

¹⁴ Adjustments due to the application of the principle of recording reservation services separately have no effect on the VA of any of the industries

3.4 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). This is the table where the confrontation and reconciliation between supply and demand (inclusive of internal tourism consumption) takes place. It is derived from the SU-tables in the 1993 SNA¹⁵. Table 11 shows the domestic supply and internal tourism consumption by product (Table 6 of the TSA). The tourism direct gross value added (TDGVA) for South Africa amounted to R74 772 million (or 3,1% of total GVA generated) for 2010, compared with R63 911 million (or 2,9% of total GVA generated) in 2009 and R62 155 million (or 3,1% of total GVA generated) in 2008.

Tourism industry ratio*

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

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

- 1 A **tourism-characteristic industry** is one where:
 - At least 25 percent of the industry's output is purchased by tourists (i.e. the tourism industry ratio is greater or equal to 0,25);
 - The industry's characteristic output includes a tourism-characteristic product. For example, less than 25% of railway transport industry's output is consumed by tourists, 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% and 25% of the industry's output is purchased by tourists (i.e. the tourism industry ratio is greater than 0,05 and 0,25);
 - A direct physical contact occurs between the industry and the tourist 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 tourists.

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.

¹⁵ TSA: RMF

Table 11: Domestic supply and internal tourism consumption by product, 2010 (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	40 172	6 273	59 327	3 055	6 194	7 783	122 803	5 890	15 957	144 651	
A.1 Characteristic products	40 172	6 273	59 327	3 055	6 194	7 783	122 803		4 828	127 631	
1. Accommodation services	35 130						35 130			35 130	
1.1 Hotel and other accommodation for visitors other than 1.2	35 130						35 130			35 130	
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	5 042	6 273					11 316		3 541	14 856	
3. Passenger transport services			59 327	3 055			62 381		1 287	63 668	
3.1 Railway passenger transport services			317				317			317	
3.2 Road passenger transport services			37 834				37 834		1 287	39 121	
3.3 Water passenger transport services			9				9			9	
3.4 Air passenger transport services			21 167				21 167			21 167	
3.5 Passenger transport equipment rental				3 055			3 055			3 055	
4. Travel agencies and other reservation services					6 194		6 194			6 194	
5. Cultural industry						265	265			265	
6. Sports and recreational industry						7 518	7 518			7 518	
A.2 Connected products								5 890	11 129	17 019	
Retail sales of food, beverages and tobacco								2 757	6 818	9 576	
Retail sales of textiles, clothing, footwear and leather products								1 020	3 060	4 080	
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								111	50	161	
Retail sales of household furniture, appliances, articles and equipment								662	337	999	
Retail sales of automotive fuel								1 340	863	2 204	
B. Non-specific products	1	1	14		1		18	17	23 810	23 845	
Services	1	1	1		1		5	17	8 014	8 035	
Goods			13				13		15 797	15 809	
Total output (at basic prices)	40 173	6 274	59 341	3 056	6 195	7 783	122 821	5 907	39 767	168 494	5 477
Total intermediate consumption (at purchasers' price)	18 684	3 722	35 252	1 739	3 408	5 699	68 506	2 979	22 239	93 724	
Total gross value added (at basic prices)	21 489	2 552	24 086	1 317	2 786	2 084	54 315	2 928	17 528	74 772	

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

Table 12: Derivation of tourism industry ratios, 2010

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	Sport and recreational industry	Retail trade of tourism-connected goods
A. Specific products	40 172	6 273	317	37 834	9	21 167	3 055	6 194	265	7 518	5 890
A.1 Characteristic products	40 172	6 273	317	37 834	9	21 167	3 055	6 194	265	7 518	
1. Accommodation services	35 130										
1.1 Hotel and other accommodation for visitors other than 1.2	35 130										
1.2 Accommodation services associated with all types of vacation home ownership											
2. Restaurants and similar services	5 042	6 273									
3. Passenger transport services			317	37 834	9	21 167	3 055				
3.1 Railway passenger transport services			317								
3.2 Road passenger transport services				37 834							
3.3 Water passenger transport services					9						
3.4 Air passenger transport services						21 167					
3.5 Passenger transport equipment rental							3 055				
4. Travel agencies and other reservation services								6 194			
5. Cultural industry									265		
6. Sports and recreational industry										7 518	
A.2 Connected products											5 890
Retail sales of food, beverages and tobacco											2 757
Retail sales of textiles, clothing, footwear and leather products											1 020
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											111
Retail sales of household furniture, appliances, articles and equipment											662
Retail sales of automotive fuel											1 340
B. Non-specific products	1	1		12		2					17
Services	1	1		0		1					17
Goods				12		1					
Total purchased by tourists	40 173	6 274	317	37 846	9	21 169	3 055	6 194	265	7 518	5 907
Total industry output	51 250	17 870	4 558	103 031	17	22 431	4 754	6 321	1 274	24 214	76 963
Tourism industry ratio	0,78	0,35	0,07	0,37	0,53	0,94	0,64	0,98	0,21	0,31	0,08

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

Tourism direct gross value added and tourism direct gross domestic product

Table 6¹⁶ 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 can also be generated by other industries. Not all GVATI is part of the TDGVA, since these industries may also serve non-visitors in the same way the non-tourism industries may serve visitors, and thus generate part of TDGVA¹⁷. 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 aggregates¹⁸. Figure 9 explains schematically the link between GVATI and TDGVA.

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

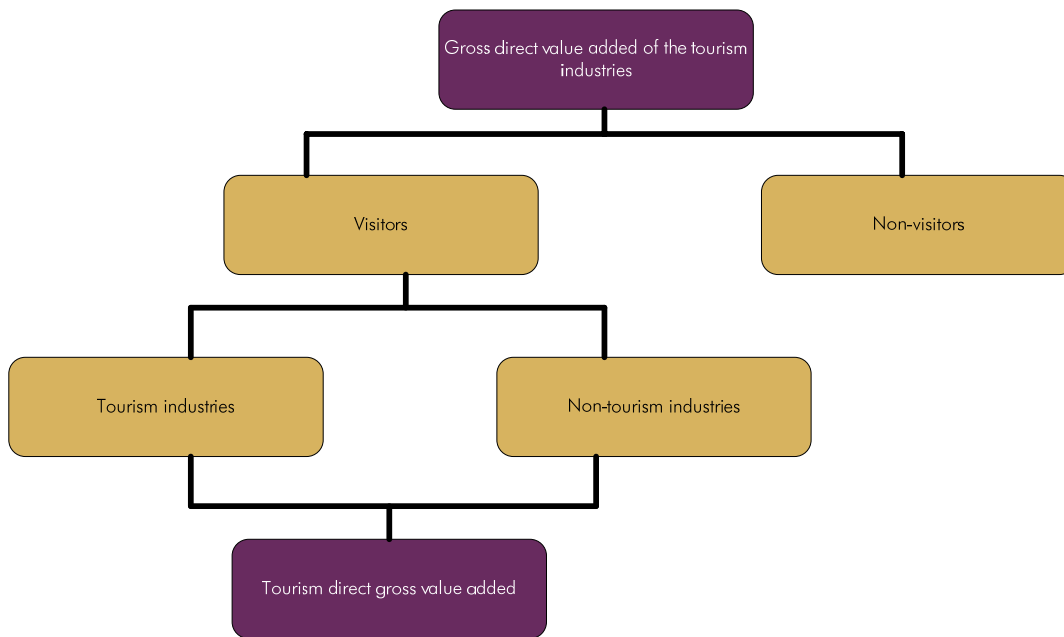


Table 13 shows the calculation of TDGVA and TDGDP for South Africa for 2010. TDGDP was R80 249 million (or 3,0% of total gross domestic product) for 2010, R68 831 million (or 2,9% of total gross domestic product) for 2009, R67 199 million (or 3,0% of total gross domestic product) for 2008 and R59 781 million (or 3,0% of total gross domestic product) for 2007.

¹⁶ This table is the core of the TSA

¹⁷ TSA: RMF

¹⁸ TSA: RMF

Table 13: Tourism direct gross value added and tourism direct gross domestic product, 2010

	2010
Total supply of goods and services	6 444 743
Less imports of goods and services	732 994
Less net taxes (taxes less subsidies) on products	248 944
Equals total domestic supply of goods and services (output)	5 462 805
Less intermediate consumption	3 050 314
Gross value added of the economy	2 412 491
Total tourism output	168 494
Less total tourism intermediate consumption	93 724
Equals tourism direct gross value added (TDGVA)	74 772
TDGVA (%)	3,1
Tourism direct gross value added	74 772
Plus tourism share of net taxes on products	5 477
Equals tourism direct gross domestic product (TDGDP)	80 249
TDGDP¹⁹ (%)	3,0

Table 14 and Table 15 show TDGVA for 2010 (R million and percentage contribution).

Table 14: Tourism direct gross value added, 2010 (R million)

Tourism product	2006
Accommodation for visitors	21 489
Food and beverages serving industry	2 552
Railway passenger transport	192
Road passenger transport	17 923
Water passenger transport	3
Air passenger transport	5 968
Transport equipment rental	1 317
Travel agencies and other reservation services industry	2 786
Cultural industry	71
Sport and recreational industry	2 013
Retail trade of tourism-connected goods	2 928
Other non-tourism industries	17 528
Total	74 772

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

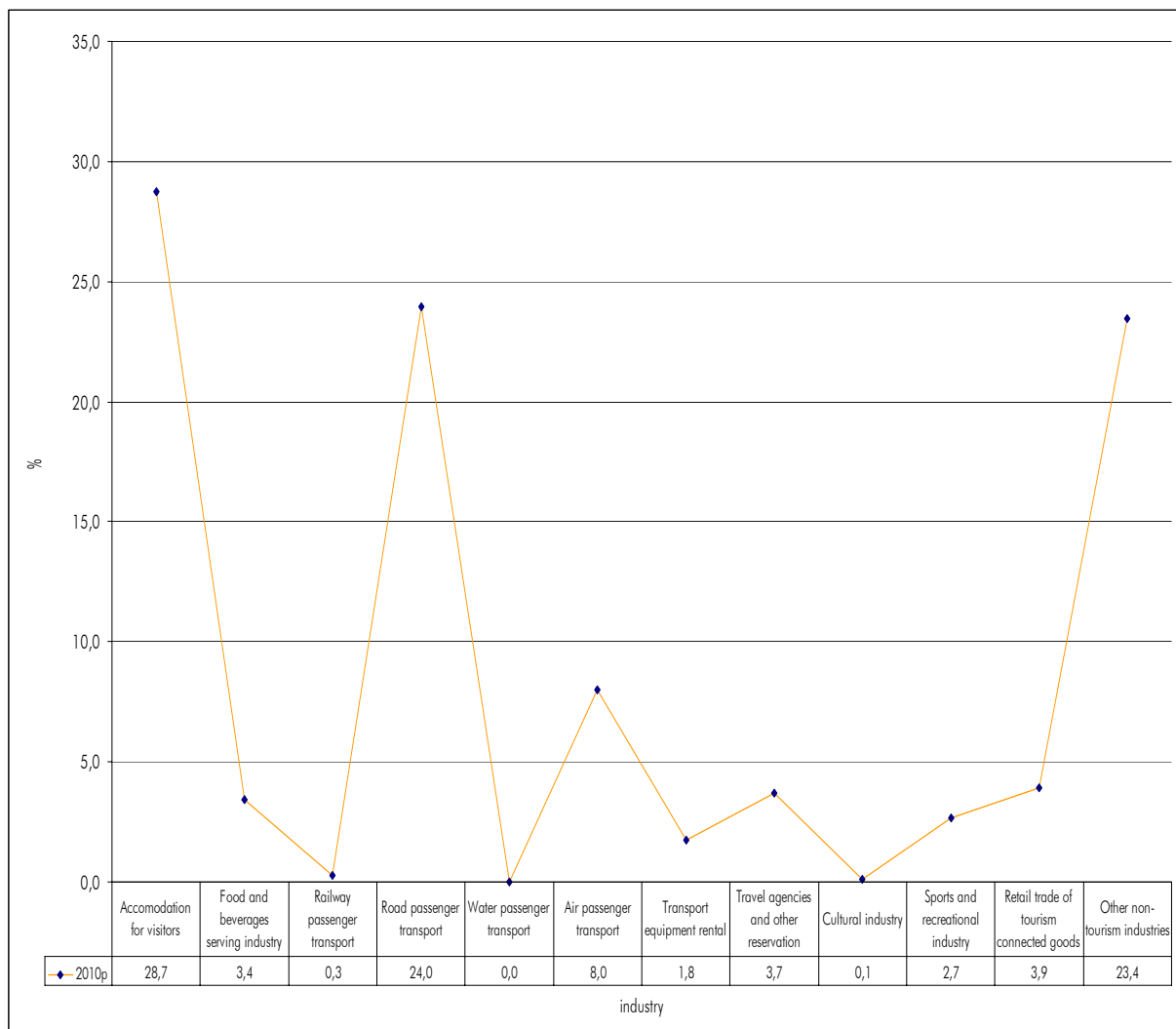
¹⁹ Gross domestic product is equal to gross value added plus net taxes on products
Tourism Satellite Account for South Africa, provisional 2010

Table 15: Tourism direct gross value added, 2010 (%)

Tourism product	2006
Accommodation for visitors	28,7
Food and beverages serving industry	3,4
Railway passenger transport	0,3
Road passenger transport	24,0
Water passenger transport	0,0
Air passenger transport	8,0
Transport equipment rental	1,8
Travel agencies and other reservation services industry	3,7
Cultural industry	0,1
Sport and recreational industry	2,7
Retail trade of tourism-connected goods	3,9
Other non-tourism industries	23,4
Total	100,0

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

Figure 7: Tourism direct gross value added, 2010 (%)



Source: Statistics South Africa

3.5 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 observed²⁰. 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.

Table 16 shows employment in the tourism industries by population group for 2010. There were 567 378 persons (or 4,3 % of total employment) directly engaged in producing goods and services purchased by tourists in 2010.

Tourism industry ratios have been used to allocate employment numbers (by industry) to tourism²¹.

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 example 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. 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.

²⁰ TSA: RMF

²¹ 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 16: Number of persons employment in the tourism industries by population group, 2010

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	Sport and recreational industry	Retail trade (of tourism-connected goods)	Total
Total employment												
Black African	99 038	236 090	28 949	368 805	166	9 972	6 607	11 804	34 742	28 429	796 975	1 621 578
Coloured	15 459	33 371	6 686	35 602	382	1 780	1 532	2 330	8 466	8 345	155 787	269 740
Indian/Asian	2 962	6 997	454	15 596	1 839	656	1 953	2 322	2 698	2 277	87 988	125 743
White	26 129	32 041	8 925	44 173	1 022	9 052	1 319	6 192	25 426	10 725	144 458	309 463
Total	143 588	308 500	45 014	464 177	3 408	21 461	11 411	22 648	71 333	49 776	1 185 208	2 326 524
Tourism industry ratio	0,78	0,35	0,07	0,37	0,53	0,94	0,64	0,98	0,21	0,31	0,08	
Tourism employment												
Black African	77 631	82 893	2 013	135 470	89	9 411	4 246	11 566	7 229	8 827	61 171	400 548
Coloured	12 117	11 717	465	13 078	205	1 680	984	2 283	1 762	2 591	11 957	58 839
Indian/Asian	2 322	2 457	32	5 729	987	619	1 255	2 275	561	707	6 753	23 698
White	20 482	11 250	621	16 226	549	8 543	847	6 067	5 291	3 330	11 088	84 293
Total	112 553	108 317	3 130	170 503	1 830	20 253	7 333	22 192	14 843	15 455	90 970	567 378

**Individual figures may not add up to stated totals due to rounding
 Source: Statistics South Africa, *Quarterly Labour Force Survey, 2010*

Chapter 4: The future development of TSA for South Africa

In accordance with the recommendations set out by the 2008 TSA: RMF, the South African TSA for 2010 focused on the compilation of Tables 1–7 and Table 10. A number of future developments are being considered. These are articulated below:

- Separate the same-day visitors consumption expenditure from the tourists (overnight visitors) for consumption expenditure for inbound and domestic tourism;
- Investigate the possibility of compiling Table 3 of the TSA (outbound tourism). Currently, the main constraint with the compilation of Table 3 for South Africa is the availability of data;
- Further research the treatment of the service charges paid to travel agents, tour operators and other reservation services;
- Research the treatment of housing services provided by second homes on own account or for free. This imputed rent should be included in the TSA for the calculation of GDVATI, TDGVA and TDGDP. The current constraint is the availability of data and the appropriate instrument to collect the data;
- Measure the fulltime employees (FTE) who are directly engaged in producing goods and services purchased by tourists in South African economy; and
- Investigate the possibility of collecting data on tourism single-purpose consumer durables as a long-term goal by SAT.

The next TSA report for South Africa will be the final results for 2008 and 2009, and the provisional results for 2010 and 2011. This report is scheduled to be published on 29 March 2013. 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: tsa@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 the various international organisations could present the results of countries that have developed a TSA in a comparable way in the future.

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 1.0 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 CPC, Version 1.0 and has been drawn from it. If the sixth digit is however 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	Sport and recreational sport 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 sport equipment leasing or rental services
73240.3	Non-motorised air transport equipment leasing or rental services
73240.4	Water sport 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 1993 SNA definition, the TSA defines tourism industries as all establishments whose principal productive activity is a tourism-characteristic activity.

Table A reveals the similarity 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 Accounts tables of South Africa

Annexure C provides the TSA tables for South Africa for the reference year 2010.

Table 1 of the TSA focuses on inbound tourism expenditure by product and class of visitor²². The main source of data for the compilation of Table 1 of the TSA is the BoP from SARB and the SAT departure survey. Table B shows inbound tourism expenditure by product and class of visitor.

²² Tourists and same-day visitors

Table B: TSA Table 1 – Inbound tourism expenditure, by product and class of visitor, 2010 (R million)

Product	Tourists (1.1)	Same-day visitors (1.2)	Total visitors (1.3)=(1.1)+(1.2)
A. Specific products			55 797
A.1 Tourism-characteristic products			46 867
1 – Accommodation services for visitors (*)		X	12 421
1.a – Accommodation services for visitors other than 1.b (*)		X	12 421
1.b – Accommodation services associated with all types of vacation home ownership (*)		X	
2 – Food and beverage serving services (*)			8 296
Total passenger transport services (*)			19 107
3 – Railway passenger transport services (*)			91
4 – Road passenger transport services (*)			9 543
5 – Water passenger transport services (*)			2
6 – Air passenger transport services (*)			8 375
7 – Transport equipment rental services (*)			1 096
8 – Travel agencies and other reservation services (**)			1 833
9 – Cultural services (*)			141
10 – Sport and recreational services (*)			5 069
A.2 Tourism-connected products (*) (a)			8 931
Retail sales of food, beverages and tobacco			4 978
Retail sales of textiles, clothing, footwear and leather goods			2 313
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles			95
Retail sales of household furniture, appliances, articles and equipment			856
Retail sales of automotive fuels			689
B. Non-specific products			13 625
Services			3 542
Goods			10 082
Total inbound tourism expenditure			69 422
Number of trips			11 303 087 ²³
Number of overnights		X	8 073 552

X does not apply

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

²³ Inbound visitors

Table 2 of the TSA focuses on domestic tourism expenditure by product, class of visitor and type of trip. The main source of data for the compilation of Table 2 of the TSA is the SU-tables, the SAT domestic survey and the tourism module in the GHS. Table C shows domestic tourism expenditure by product, class of visitor and type of trip for 2010.

Table C: TSA Table 2 – Domestic tourism expenditure, by product, class of visitor and type of trip, 2010 (R million)

Product	Resident visitors on a domestic trip			Resident visitors on an international trip			Total domestic tourism expenditure		
	Tourists (2.1)	Same-day visitors (2.2)	Total visitors (2.3)=(2.1)+(2.2)	Tourists (2.4)	Same-day visitors (2.5)	Total visitors (2.6)=(2.4)+(2.5)	Tourists (2.7)=(2.1)+ (2.4)	Same-day visitors (2.8)=(2.2)+ (2.5)	Total visitors (2.9)=(2.3)+ (2.6)
A. Specific products									88 853
A.1 Tourism-characteristic products									80 765
1 – Accommodation services for visitors (*)		X			X			X	22 709
1.a – Accommodation services for visitors other than 1.b (*)		X			X			X	22 709
1.b – Accommodation services associated with all types of vacation home ownership (*)		X			X			X	
2 – Food and beverage serving services (*)									6 561
Total passenger transport services (*)									44 561
3 – Railway passenger transport services (*)									226
4 – Road passenger transport services (*)									29 578
5 – Water passenger transport services (*)									7
6 – Air passenger transport services (*)									12 791
7 – Transport equipment rental services (*)									1 959
8 – Travel agencies and other reservation services (**)									4 361
9 – Cultural services (*)									124
10 – Sport and recreational services (*)									2 449
A.2 Tourism-connected products (*) (a)									8 088
Retail sales of food, beverages and tobacco									4 597
Retail sales of textiles, clothing, footwear and leather goods									1 768
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles									66
Retail sales of household furniture, appliances, articles and equipment									143
Retail sales of automotive fuels									1 515
B. Non-specific products									10 219
Services									4 492
Goods									5 727
Total domestic tourism expenditure									99 072
	Number of day trips								12 200 000
	Number of overnights		X			X		X	29 700 000

Figures might not add up due to rounding
X does not apply

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table 3 of the TSA shows the outbound tourism expenditure of South African residents by product and class of visitor.

There is currently limited data on the expenditure of South Africans outside the borders of the country (only the total expenditure of South African residents outside the borders of the country from the BoP from SARB).

Table D shows outbound tourism expenditure by product and class of visitor for 2010.

Table D: TSA Table 3 – Outbound tourism expenditure, by product and class of visitor, 2010 (R million)

Product	Tourism expenditure of outbound visitors in other economies			Acquisition from non-residents by visitors on domestic trips			Total outbound expenditure		
	Tourists (3.1)	Same-day visitors (3.2)	Total visitors (3.3)=(3.1)+(3.2)	Tourists (3.4)	Same-day visitors (3.5)	Total visitors (3.6)=(3.4)+(3.5)	Tourists (3.7)=(3.1)+ (3.4)	Same-day visitors (3.8)=(3.2)+ (3.5)	Total visitors (3.9)=(3.3)+ (3.6)
A. Specific products									
A.1 Tourism-characteristic products									
1 – Accommodation services for visitors (*)		X			X			X	
1.a – Accommodation services for visitors other than 1.b (*)		X			X			X	
1.b – Accommodation services associated with all types of vacation home ownership (*)		X			X			X	
2 – Food and beverage serving services (*)									
Total passenger transport services (*)									
3 – Railway passenger transport services (*)									
4 – Road passenger transport services (*)									
5 – Water passenger transport services (*)									
6 – Air passenger transport services (*)									
7 – Transport equipment rental services (*)									
8 – Travel agencies and other reservation services (**)									
9 – Cultural services (*)									
10 – Sport and recreational services (*)									
A.2 Tourism-connected products (*) (a)									
Retail sales of food, beverages and tobacco									
Retail sales of textiles, clothing, footwear and leather goods									
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles									
Retail sales of household furniture, appliances, articles and equipment									
Retail sales of automotive fuels									
B. Non-specific products									
Services									
Goods									
Total outbound tourism expenditure									59 452

X does not apply

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table 4 of the TSA focuses on internal tourism consumption by product.

Table 4 of the TSA combines internal tourism expenditure (Table 1 of the TSA) and domestic tourism expenditure (Table 2 of the TSA) with the other components of tourism consumption. There are four categories²⁴ of 'other components of tourism consumption', and they are:

- **Services associated to vacation accommodation on own account** – includes all imputed accommodation services related to accommodation units on own account and to all other types of vacation-home ownership;
- **Tourism social transfers in kind (except refunds)** – includes the value of individual non-market services provided by governments and non-profit institutions serving households (NPISH) that benefit visitors and exceed the values paid by the visitors themselves;
- **Other imputed consumption** – all other imputed items not previously included; and
- **Tourism single-purpose consumer durables purchased outside the context of a trip or for a trip.**

Internal tourism consumption is the key aggregate derived from Table 4. The production process by which internal tourism consumption (except imports) is provided will be the basis for the compilation of TDGVA and TDGDP²⁵.

Table 4 of the TSA uses the information from Tables 1 and 2 of the TSA, so no additional surveys are used in its compilation. The totals, therefore, have their origins in the SU-tables, SAT inbound and domestic survey, the tourism module of the GHS and the BoP (as in Tables 1 and 2 of the TSA).

Table E shows Table 4 of the TSA: Internal tourism consumption by product for 2010.

²⁴ Additional to Table 1 and Table 2 of the TSA

²⁵ TSA: RMF

Table E: TSA Table 4 – Internal tourism consumption by product, 2010 (R million)

Product	Internal tourism expenditure			Other components of tourist consumption (b) (4.2)	Internal tourism consumption (4.3) = (4.1) + (4.2)
	Inbound tourism consumption (1.3)	Domestic tourism consumption (2.9)	Internal tourism consumption in cash (4.1) = (1.3) + (2.9)		
A. Specific products	55 797	88 853	144 651		144 651
A.1 Tourism-characteristic products	46 867	80 765	127 631		127 631
1 – Accommodation services for visitors (*)	12 421	22 709	35 130		35 130
1.a – Accommodation services for visitors other than 1.b (*)	12 421	22 709	35 130		35 130
1.b – Accommodation services associated with all types of vacation home ownership (*)					
2 – Food and beverage serving services (*)	8 296	6 561	14 856		14 856
Total passenger transport services (*)	19 107	44 561	63 668		63 668
3 – Railway passenger transport services (*)	91	226	317		317
4 – Road passenger transport services (*)	9 543	29 578	39 121		39 121
5 – Water passenger transport services (*)	2	7	9		9
6 – Air passenger transport services (*)	8 375	12 791	21 167		21 167
7 – Transport equipment rental services (*)	1 096	1 959	3 055		3 055
8 – Travel agencies and other reservation services (**)	1 833	4 361	6 194		6 194
9 – Cultural services (*)	141	124	265		265
10 – Sport and recreational services (*)	5 069	2 449	7 518		7 518
A.2 Tourism-connected products (*) (a)	8 931	8 088	17 019		17 019
Retail sales of food, beverages and tobacco	4 978	4 597	9 576		9 576
Retail sales of textiles, clothing, footwear and leather goods	2 313	1 768	4 080		4 080
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	95	66	161		161
Retail sales of household furniture, appliances, articles and equipment	856	143	999		999
Retail sales of automotive fuels	689	1 515	2 204		2 204
B. Non-specific products	13 625	10 219	23 844		23 844
Services	3 542	4 492	8 034		8 034
Goods	10 082	5 727	15 809		15 809
Total internal tourism consumption	69 422	99 072	168 494		168 494

Figures might not add up due to rounding

X does not apply

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table F shows the prescribed format of Table 5 of the TSA. This table focuses on the production accounts of tourism industries and other industries (at basic prices).

It conforms formally to the format established by the 1993 SNA, but the perspective is different from 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 country²⁶. For each industry and for the total economy, GVA at basic prices has to equal to GVA of the economy as it appears in the national accounts²⁷.

The first block in Table 5 of the TSA disaggregates output into product types (goods and services) and is valued at basic prices. The second block contains intermediate consumption or input disaggregated into categories based on the CPC classification²⁸ and is valued at purchasers' prices. The difference between the total output (at basic prices) from the first block and total intermediate consumption (at purchasers' prices) in the second block equals total gross value added of industries (at basic prices). The value added refers to industries as a whole and is disaggregated further in the third block to represent specific components of remuneration of employees, net taxes on production, operating surplus and mixed income²⁹.

Table 5 of the TSA is compiled from the SU-tables. Several other surveys like the AFS³⁰ and LSSs are also used to compile this table. Recently, the level of detail that samples are drawn for the AFS has increased³¹ based on the needs from the tourism industry and more specifically the TSA. This survey collects financial data from enterprises in industries that represent different SIC groups.

Several of the LSSs (i.e. accommodation, food and beverages, transport and personal services) are also used to compile this table. Unfortunately, there are several different industries that will need to be covered in the LSS series. This will make it difficult to collect all the required information for one specific year because of the rotation of LSS collection. Adjustments must be done in instances where surveys refer to different years to ensure that the distributions used from the surveys are representative of the same time period³².

Stats SA conducts several monthly surveys which are used in the compilation of Table 5 of the TSA. The survey of tourist accommodation was first introduced in April 2004. It is a monthly survey and its results are published on a quarterly basis. The monthly food and beverage survey was also introduced in April 2004 and the results are published on a quarterly basis.

In order to compile Table 5 of the TSA, South Africa needs to identify the specific goods and services, as well as industries that are unique to their individual situation. Each country needs to determine industries that they wish to include under 'Country-specific tourism industries'. For goods and services, each country needs to determine 'Other country-specific tourism-characteristic goods', 'Other country-specific tourism-characteristic services', 'Tourism-connected products' and 'Non-consumption products'.

²⁶ TSA: RMF

²⁷ Adjustments due to the application of the principle of recording reservation services separately have no effect on the VA of any of the industries

²⁸ In the SU-tables, products are currently linked to SIC (and ISIC). In future products will be linked to CPC codes (research work underway)

²⁹ TSA: RMF

³⁰ The EAS has been renamed to AFS from the reference year 2006 (first published as the AFS on 31 October 2007)

³¹ From 2006. Level of detail changed from 3 digit SIC to 4 digit SIC

³² Use for distributions, not levels

Table F: TSA Table 5 – Production accounts of tourism industries and other industries, 2010 (R million)

Product	Tourism-characteristic industries							
	1a. Accommodation services in 55	1b. Accommodation services in 68	2 Restaurants and similar	3 Railway passenger transport	4 Road passenger transport	5 Water passenger transport	6 Air passenger transport	7 Transport equipment rental
A. Specific products	50 912		17 458	4 558	101 517	17	21 925	4 568
A.1 Tourism-characteristic products	50 912		17 458	4 558	101 517	17	21 925	4 568
1 – Accommodation services for visitors (*)	36 880							
1.a – Accommodation services for visitors other than 1.b (*)	36 880							
1.b – Accommodation services associated with all types of vacation home ownership (*)								
2 – Food and beverage serving services (*)	14 032		17 458					
Total passenger transport services (*)				4 558	101 517	17	21 925	4 568
3 – Railway passenger transport services (*)				4 558				
4 – Road passenger transport services (*)					101 517			
5 – Water passenger transport services (*)						17		
6 – Air passenger transport services (*)							21 925	
7 – Transport equipment rental services (*)								4 568
8 – Travel agencies and other reservation services (**)								
9 – Cultural services (*)								
10 – Sport and recreational services (*)								
A.2 Tourism-connected products (*) (a)								
Retail sales of food, beverages and tobacco								
Retail sales of textiles, clothing, footwear and leather goods								
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles								
Retail sales of household furniture, appliances, articles and equipment								
Retail sales of automotive fuels								
B. Non-specific products	388		412		1 514		508	186
Services	388		412		161		355	186
Goods					1 352		151	
I. Total output (at basic prices)	51 250		17 870	4 558	103 031	17	22 431	4 754
II. Total intermediate consumption (at purchasers' prices) (b)	23 836		10 601	1 790	54 236	10	16 108	2 706
(I-II). Total gross value added (at basic prices)	27 414		7 269	2 768	48 795	6	6 323	2 049
Compensation of employees	6 364		2 285	1 007	13 567	1	1 601	331
Other taxes less subsidies	504		55	-	-212	-	103	4
Gross mixed income								
Gross operating surplus	20 546		4 929	1 761	35 441	6	4 619	1 715

Figures might not add up due to rounding
X does not apply

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table F: TSA Table 5 – Production accounts of tourism industries and other industries, 2010 (R million) (concluded)

Product	Tourism-characteristic industries			Total tourism-characteristic industries	Tourism-related industries	Total non-tourism industries	Total output of domestic producers (at basic prices)
	8 Travel agencies and similar	9 Cultural services	10 Sport and recreational services		Retail trade of tourism-connected goods		
A. Specific products	6 320	1 267	24 078	232 620	70 317	129 649	432 585
A.1 Tourism-characteristic products	6 320	1 267	24 078	232 620		13 308	245 927
1 – Accommodation services for visitors (*)				36 880			36 880
1.a – Accommodation services for visitors other than 1.b (*)				36 880			36 880
1.b – Accommodation services associated with all types of vacation home ownership (*)							
2 – Food and beverage serving services (*)				31 490		9 854	41 344
Total passenger transport services (*)				132 584		3 454	136 038
3 – Railway passenger transport services (*)				4 558			4 558
4 – Road passenger transport services (*)				101 517		3 454	104 971
5 – Water passenger transport services (*)				17			17
6 – Air passenger transport services (*)				21 925			21 925
7 – Transport equipment rental services (*)				4 568			4 568
8 – Travel agencies and other reservation services (**)	6 320			6 320			6 320
9 – Cultural services (*)		1 267		1 267			1 267
10 – Sport and recreational services (*)			24 078	24 078			24 078
A.2 Tourism-connected products (*) (a)					70 317	116 341	186 658
Retail sales of food, beverages and tobacco					27 110	67 038	94 148
Retail sales of textiles, clothing, footwear and leather goods					10 727	32 180	42 906
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles					9 732	4 418	14 150
Retail sales of household furniture, appliances, articles and equipment					14 372	7 309	21 681
Retail sales of automotive fuels					8 376	5 396	13 772
B. Non-specific products	1	7	136	3 101	6 646	5 020 473	5 030 220
Services	1	7	136	1 597	6 646	3 165 639	3 173 882
Goods				1 503		1 854 834	1 856 337
I. Total output (at basic prices)	6 321	1 274	24 214	235 720	76 963	5 150 122	5 462 805
II. Total intermediate consumption (at purchasers' prices) (b)	3 478	933	17 730	131 427	38 813	2 880 073	3 050 314
(I-II). Total gross value added (at basic prices)	2 843	341	6 485	104 293	38 150	2 270 049	2 412 491
Compensation of employees	2 179	172	3 267	30 773	24 007	1 147 212	1 201 992
Other taxes less subsidies	1	17	326	798	825	36 112	37 735
Gross mixed income							
Gross operating surplus	663	152	2 892	72 723	13 318	1 086 723	1 172 764

Figures might not add up due to rounding

X does not apply

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table 6 of the TSA is the core of the TSA and focuses on total domestic supply and internal tourism consumption (at purchasers' prices). This is the table where the confrontation and reconciliation between supply and internal tourism consumption takes place. It is derived from the SU-tables in the 1993 SNA³³.

The tourism ratios (in %) allow for the estimate of the two main aggregates, namely TDGVA and TDGDP. It is important to bear in mind that because a series of assumptions³⁴ is used to relate inputs to particular outputs of the production processes of industries, the results have a modelled component and thus cannot be considered to be directly observed or reconciled with statistical data³⁵.

The identification of inconsistencies between supply and demand allows for an extensive analysis of previous data used. Any inconsistencies identified need to be studied to determine their origin and a method to rectify and improve them.

Table 6 of the TSA focuses on the total domestic supply and internal tourism consumption (at purchasers' prices) for 2010. Table G shows the prescribed format of Table 6 of the TSA.

Table 7 of the TSA focuses on employment in the tourism industries. Countries are encouraged to measure employment at least twice a year, at peak and low tourism season³⁶. The IRTS describes in detail 'concepts and definitions of employment in the tourism industries, its basic categories, major classifications, as well as statistical measures'³⁷. Chapter 7 in the IRTS should be considered when compiling Table 7 in the TSA framework as it provides details on the specifics involved when measuring employment in the tourism industry.

Table H shows the prescribed³⁸ format of Table 7. Currently, it is not possible to populate the table as prescribed, and an alternative format³⁹ is presented earlier in this document.

³³ TSA: RMF

³⁴ The more refined and accurate the assumptions on how tourism consumption affects each industry, the more precise the measurement

³⁵ TSA: RMF

³⁶ TSA: RMF

³⁷ TSA: RMF

³⁸ TSA: RMF

³⁹ For the interim

Table G: TSA Table 6 – Total domestic supply and internal tourism consumption (at purchasers' prices), 2010 (R million)

Product	Tourism-characteristic industries											
	1.a Accommodation services in 55		2 Restaurants and similar		3 Railway passenger transport		4 Road passenger transport		5 Water passenger transport		6 Air passenger transport	
	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)
A. Specific products	50 912	40 172	17 458	6 273	4 558	317	101 517	37 834	17	9	21 925	21 167
A.1 Tourism-characteristic products	50 912	40 172	17 458	6 273	4 558	317	101 517	37 834	17	9	21 925	21 167
1 – Accommodation services for visitors (*)	36 880	35 130										
1.a – Accommodation services for visitors other than 1.b (*)	36 880	35 130										
1.b – Accommodation services associated with all types of vacation home ownership (*)												
2 – Food and beverage serving services (*)	14 032	5 042	17 458	6 273								
Total passenger transport services (**)					4 558	317	101 517	37 834	17	9	21 925	21 167
3 – Railway passenger transport services (*)					4 558	317						
4 – Road passenger transport services (*)							101 507	37 834				
5 – Water passenger transport services (*)									17	9		
6 – Air passenger transport services (*)											21 925	21 167
7 – Transport equipment rental services (*)												
8 – Travel agencies and other reservation services (**)												
9 – Cultural services (*)												
10 – Sport and recreational services (*)												
A.2 Tourism-connected products (*) (a)												
Retail sales of food, beverages and tobacco												
Retail sales of textiles, clothing, footwear and leather goods												
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles												
Retail sales of household furniture, appliances, articles and equipment												
Retail sales of automotive fuels												
B. Non-specific products	338	1	412	1			1 514	12			506	2
Services	338	1	412	1			161	0			355	1
Goods							1 352	12			151	1
I. Total output (at basic prices)	51 250	40 173	17 870	6 274	4 558	317	103 031	37 846	17	9	22 431	21 169
II. Total intermediate consumption (at purchasers' prices) (b)	23 836	18 684	10 601	3 722	1 790	124	54 236	19 922	10	5	16 108	15 201
(I-II). Total gross value added (at basic prices)	27 414	21 489	7 269	2 552	2 768	192	48 795	17 923	6	3	6 323	5 968

Figures might not add up due to rounding

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table G: TSA Table 6 – Total domestic supply and internal tourism consumption (at purchasers' prices), 2010 (R million) (continued)

Product	Tourism-characteristic industries								Tourism-related industries			
	7 Transport equipment rental		8 Travel agencies and similar		9 Cultural services		10 Sport and recreational services		Total tourism-characteristic industries		Retail trade of tourism-connected goods	
	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)
A. Specific products	4 568	3 055	6 320	6 194	1 267	265	24 078	7 518	232 620	122 803	70 317	5 890
A.1 Tourism-characteristic products	4 568	3 055	6 320	6 194	1 267	265	24 078	7 518	232 620	122 803	70 317	5 890
1 – Accommodation services for visitors (*)									36 880	35 130		
1.a – Accommodation services for visitors other than 1.b (*)									36 880	35 130		
1.b – Accommodation services associated with all types of vacation home ownership (*)												
2 – Food and beverage serving services (*)									31 490	11 316		
Total passenger transport services (*)	4 568	3 055							132 584	62 381		
3 – Railway passenger transport services (*)									4 558	317		
4 – Road passenger transport services (*)									101 517	37 834		
5 – Water passenger transport services (*)									17	9		
6 – Air passenger transport services (*)									21 925	21 167		
7 – Transport equipment rental services (*)	4 568	3 055							4 568	3 055		
8 – Travel agencies and other reservation services (**)			6 320	6 194					6 320	6 194		
9 – Cultural services (*)					1 267	265			1 267	265		
10 – Sport and recreational services (*)							24 078	7 518	24 078	7 518		
A.2 Tourism-connected products (*) (a)											70 317	5 890
Retail sales of food, beverages and tobacco											27 110	2 757
Retail sales of textiles, clothing, footwear and leather goods											10 727	1 020
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles											9 732	111
Retail sales of household furniture, appliances, articles and equipment											14 372	662
Retail sales of automotive fuels											8 376	1 340
B. Non-specific products	186	-	1	1	7	-	136	-	3 101	18	6 646	17
Services	186	-	1	1	7	-	136	-	1 597	5	6 646	17
Goods									1 503	13		
I. Total output (at basic prices)	4 754	3 056	6 321	6 195	1 274	265	24 214	7 518	235 720	122 821	76 963	5 907
II. Total intermediate consumption (at purchasers' prices) (b)	2 706	1 739	3 478	3 408	933	194	17 730	5 505	131 427	68 506	38 813	2 979
(I-II). Total gross value added (at basic prices)	2 049	1 317	2 843	2 786	341	71	6 485	2 013	104 293	54 315	38 150	2 928

Figures might not add up due to rounding

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table G: TSA Table 6 – Total domestic supply and internal tourism consumption (at purchasers' prices), 2010 (R million) (concluded)

Product	Other industries		Total output of domestic producers (at basic prices)		Taxes less subsidies on products nationally produced and imported	
	Output	Tourism share (in value)	Output	Tourism share (in value)	Output	Tourism share (in value)
A. Specific products	129 649	15 957	432 585	144 651		
A.1 Tourism-characteristic products	13 308	4 828	245 927	127 631		
1 – Accommodation services for visitors (*)			36 880	35 130		
1.a – Accommodation services for visitors other than 1.b (*)						
1.b – Accommodation services associated with all types of vacation home ownership (*)			36 880	35 130		
2 – Food and beverage serving services (*)	9 854	3 541	41 344	14 856		
Total passenger transport services (*)	3 454	1 287	136 038	63 668		
3 – Railway passenger transport services (*)			4 558	317		
4 – Road passenger transport services (*)	3 454	1 287	104 971	39 121		
5 – Water passenger transport services (*)			17	9		
6 – Air passenger transport services (*)			21 925	21 167		
7 – Transport equipment rental services (*)			4 568	3 055		
8 – Travel agencies and other reservation services (**)			6 320	6 194		
9 – Cultural services (*)			1 267	265		
10 – Sport and recreational services (*)			24 078	7 518		
A.2 Tourism-connected products (*) (a)	116 341	11 129	186 658	17 019		
Retail sales of food, beverages and tobacco	67 038	6 818	94 158	9 576		
Retail sales of textiles, clothing, footwear and leather goods	32 180	3 060	42 906	4 080		
Retail sales of pharmaceutical and medical goods, cosmetic and toiletry articles	4 418	50	14 150	161		
Retail sales of household furniture, appliances, articles and equipment	7 309	337	21 681	999		
Retail sales of automotive fuels	5 396	863	13 772	2 204		
B. Non-specific products	5 020 473	23 810	5 030 220	23 845		
Services	3 165 639	8 014	3 173 882	8 035		
Goods	1 854 834	15 797	1 856 337	15 809		
I. Total output (at basic prices)	5 150 122	39 767	5 462 805	168 494	248 944	5 477
II. Total intermediate consumption (at purchasers' prices) (b)	2 880 073	22 239	3 050 314	93 724		
(I-II). Total gross value added (at basic prices)	2 270 049	17 528	2 412 491	74 772		

Figures might not add up due to rounding

(*) The value is net of the gross service charges paid to travel agencies, tour operators and other reservation services

(**) Corresponds to the gross service charge of the travel agencies, tour operators and other reservation services and value of other services provided

Table H: TSA Table 7 – Employment in the tourism industries (TSA: RMF, 2008)

Tourism Industry	Number of establishments	Number of jobs by status in employment						Number of hours worked by status in employment						Full-time equivalent by status in employment					
		Employees			Self-employed			Employees			Self-employed			Employees			Self-employed		
		Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	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 – Railways 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 – Sport and recreational industry																			
11 – Retail trade of country-specific tourism-characteristic goods																			
12 – Country-specific tourism industries																			
Total																			

Table I: TSA Table 8 – Tourism gross fixed capital formation of tourism industries and other industries (TSA: RMF, 2008)

Product	Tourism industries												Total tourism industries	Other industries			Total tourism gross fixed capital formation of tourism industries and others	
	1	2	3	4	5	6	7	8	9	10	11	12		Public administration	Others	Total		
A. Produced non-financial assets																		
A1. Tangible fixed assets																		
1. Tourism accommodation																		
1.1 Hotels and other collective accommodation		x																
1.2 Dwellings for tourism purposes																		
2. Other buildings and structures		x																
2.1 Restaurant and similar buildings		x																
2.2 Construction of infrastructure for passenger transport by road, rail, water and air		x											(1)					
2.3 Buildings for cultural services and similar		x																
2.4 Constructions for sport, recreation and entertainment		x																
2.5 Other construction and structures		x											(1)	(1)				
3. Passenger transport equipment		x																
3.1 Road and rail		x																
3.2 Water		x																
3.3 Air		x																
4. Machinery and equipment		x											(1)	(1)				
A2. Intangible fixed assets		x											(1)	(1)				
B. Improvement of land used for tourism purposes																		
Total																		

Memo:

C. Non-produced non-financial assets		x																
1. Tangible non-produced assets		x																
2. Intangible non-produced assets		x																
TOTAL		x																

x does not apply

Key to tourism industries columns

(1) Only that which is used for tourism purpose

- 1 – Hotels and similar services
- 2 – Second home ownership (imputed)
- 3 – Restaurants and similar
- 4 – Railway passenger transport
- 5 – Road passenger transport
- 6 – Water passenger transport
- 7 – Air passenger transport
- 8 – Passenger transport supporting services
- 9 – Passenger transport equipment rental
- 10 – Travel agencies and similar
- 11 – Cultural services
- 12 – Sport and other recreation services

Table J: TSA Table 9 – Tourism collective consumption by product and level of government (TSA: RMF, 2008)

Function	National level (9.1)	Regional (state) level (9.2)	Local level (9.3)	Total tourism collective consumption (9.4)=(9.1)+(9.2)+(9.3)	Intermediate consumption by the tourism industries*
Tourism promotion					
General planning and coordination related to tourism affairs					x
Generation of statistics and of basic information on tourism					x
Administration of information bureaus					
Control and regulation of establishments in contract with visitors					x
Specific control to resident and non-resident visitors					x
Special civil defence services related with the protection of visitors					
Other services					
Total					

x does not apply

* This column reflects the expenditure by the tourism industries in tourism promotion or other services related to the functions described, when relevant

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 TSA⁴⁰. 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. Tables K to N show Table 10 of the TSA.

Table K: TSA Table 10a – Number of trips and overnights by form of tourism and class of visitor, 2010 ('000)

	Inbound tourism			Domestic tourism			Outbound tourism		
	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors	Tourists	Same-day visitors	Total visitors
Number of trips or visits (*)	8 074	3 229	11 303	29 700	12 200	41 900	-	-	-
Number of bednights	-	-	-	-	-	-	-	-	-

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

⁴⁰ TSA: RMF

Table L: TSA Table 10b – Number of 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 M: TSA Table 10c – Number of establishments and capacity by type of accommodation, 2010

	Accommodation services in ISIC 55		Accommodation services in ISIC 68	
	Hotels and similar	Others	Vacation homes	Other forms of vacation ownership
Number of establishments	2 808	7 349	-	-
Capacity (stay units)	62 500	51 800	-	-
Stay unit nights sold	11 598 000	7 587 300	-	-
Capacity (beds)	-	-	-	-
Capacity utilisation (stay units)	50,8%	40,2%	-	-
Capacity utilisation (beds)	-	-	-	-

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

	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	>1000	Total
1 – Accommodation for visitors										
1.a – Accommodation services for visitors other than 1.b										
1.b – Accommodation services associated with all types of vacation home ownership										
2 – Food and beverage serving industry										
3 – Railways 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 – Sport 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 counterparts of income in kind (except social transfers in kind) that household 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 with tourism-connected products as their principal output.
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 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 his usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.

Visitors' expenditure

Visitors' expenditure are traditionally used in the analysis of tourism economy. They include expenditure on goods and services consumed by visitors for and during their trips and stay at destination. It corresponds with the monetary transactions component of tourism consumption.

Related Tourism Satellite Account publications

Statistics South Africa, 2005. *Status of the tourism satellite account in South Africa*. Discussion document (D0405.3). Pretoria: Statistics South Africa.

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

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