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FINAL REPORT:

**DEVELOPMENT OF A FRAMEWORK TO
ASSESS THE ECONOMIC IMPACT OF
COASTAL AND MARINE TOURISM
(CMT) IN SOUTH AFRICA: PHASE 2**

**UNIVERSITY OF KWAZULU-NATAL
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DEFINITIONS

Cape Peninsula University of Technology (CPUT)

Coastal and Marine Tourism (CMT)

Cost Benefit Analysis (CBA)

Gross Domestic Product (GDP)

Input-Output (I-O)

International Recommendations for Tourism Statistics (IRTS)

National Department of Tourism (NDT)

Supply Use Tables (SUT)

Tourism direct gross value added (TDGVA)

Tourism direct gross domestic product (TDGDP)

Tourism Satellite Account (TSA)

University of KwaZulu-Natal (UKZN)

United Nations Tourism World Organisation (UNTWO)

Visiting Friends and Relatives (VFR)



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1. Introduction

Coastal and Marine Tourism (CMT), as part of the oceans economy, offers significant development opportunities that can contribute to job creation and sustainability. However, that there are limited national and international best practices to assess the economic impacts of CMT. Furthermore, there are no specific accepted methodological approaches to assess the economic impacts of CMT within a country context. During the 2016/2017 financial year, the National Department of Tourism (NDT) in collaboration with the Cape Peninsula University of Technology (CPUT) initiated a research study to develop a framework to assess the economic impact of coastal and marine tourism (CMT) in South Africa. Phase 1 of the project focused on conducting a desktop study to review relevant literature which provides a national and international perspective to identify best practices and current trends with regard to assessing the economic impacts of CMT in order to inform the development of a framework to assess the economic contribution of CMT to South Africa's tourism sector. Phase 2 of the study which was undertaken in 2017/18 focused on developing and piloting data collection surveys and examining which economic modelling approaches are appropriate to assess the economic contribution of CMT to South Africa's tourism sector. Phase 3 of the study will be undertaken in 2018/19 and will involve implementing the framework and conducting a workshop to capacitate stakeholders. The University of KwaZulu-Natal (UKZN) took over the project after the completion of Phase 1 given that Prof Urmilla Bob was involved in the project together with Prof Kamilla Swart who was the lead researcher at CPUT and resigned at the end of 2016.

The report provides a summary of Phase 2 activities, including the broader context. This is followed by a discussion of fieldwork implementation experiences, including recommendations emanating from these experiences and reflections. Section 4 considers the economic modelling experiences for TSA, I-O and CBA. The Phase 3 implementation framework is presented in Section 5. Finally, concluding remarks are forwarded.



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2. Summary/ overview of Phase 2 activities

2.1. Broader context

Phase 2 is contextualised in relation to Phase 1 outcomes which undertook, as a key deliverable, a detailed desktop study that examined how economic impacts of CMT are undertaken and challenges experienced. Furthermore, the desktop study examined the main economic modelling approaches used and their feasibility in the South African context.

The Operation Phakisa context frames the focus of the research and the following key issues underpin Operation Phakisa:

- The focus is on unlocking the economic potential of the country's oceans as part of unlocking the ocean's economy
- Highlights that South Africa's oceans are capable of generating an estimated R129 177 billion contribution to the Gross Domestic Product (GDP) by the year 2033
- Key challenges identified include lack of uptake of coastal and marine assets/ resources for tourism purposes, CMT product portfolio, high levels of unemployment and unskilled resources (especially in rural areas and around marine assets), limited participation of the private sector, insufficient infrastructure and underdeveloped and uncoordinated marine related events and recreation
- Stresses the importance of skills and capacity building as well as research, technology and innovation as enablers
- Integrated ocean governance and protection
- CTM Lab

The complex CMT environment was also noted given the intersection between coastal and marine tourism and leisure activities (Figure 1) and the range of CMT activities (Table 1). Additionally, there remains contestations pertaining to what constitutes spatially a CMT 'zone'/ location. For the purposes of this study it was agreed that the focus will be on oceanic coastal area limited to the four coastal provinces. Furthermore, while the data collection was concentrated in tourist areas close to the shoreline, the main focus was on CMT activities as summarised in Table 1.

Key thematic issues emerging from literature review were:

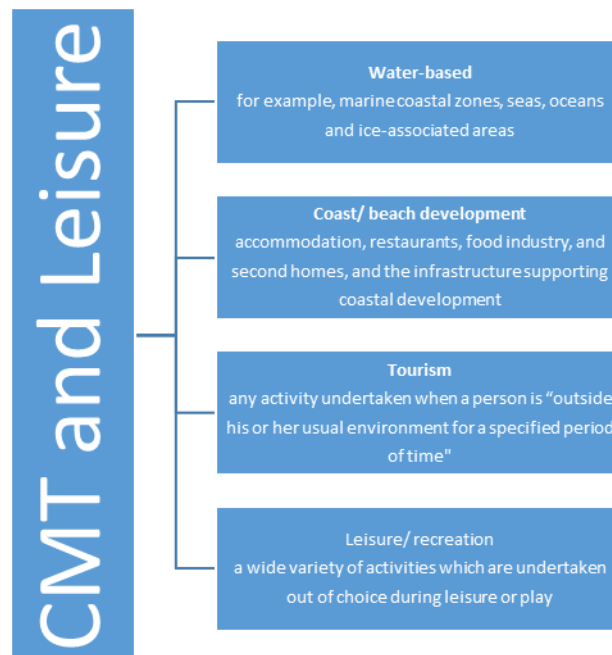


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- Growing importance of CMT globally and nationally
- Growing prominence of water-dependent recreational activities
- CMT is amongst the largest and oldest sectors of the tourism industry
- Range of different types of coastal and marine tourism and recreational activities
- CMT is diverse and covers a range of coastal and marine assets (beyond cruise and beach tourism)
- Socio-economic and environmental/ conservation roles of CTM emphasised
- Importance of Marine Protected Areas (MPAs) foregrounded
- Increasing threats that impact on CTM which includes climate change, economic shifts, security concerns and developmental demands

Figure 1: CMT and leisure activities





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Table 1: Marine tourism and coastal tourism identified by the CMT Lab (NDT, 2016)

Marine Tourism	Coastal tourism
<ul style="list-style-type: none">- Marine wildlife tourism (e.g. seals, dolphins, turtles etc.)- Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions etc.)- Scuba diving/ snorkelling (e.g. shark cage diving)- Water sports (e.g. big wave surfing, yachting, water skiing, water surfing etc.)- Ocean experience (e.g. cruise tourism, marinas, island tourism, under water archaeology etc.)- Events (e.g. marine competitions)	<ul style="list-style-type: none">- Coastal wildlife tourism (e.g. land-based whale watching, marine turtle tours etc.)- Sand/ beach sport (e.g. kite-flying, beach combing, sand dune surfing etc.)- Coastal heritage and events (e.g. local seafood and cultural tourism, cultural history etc.)- Sightseeing (e.g. light house tourism, cycling, marathons etc.)- Educational and scientific excursions (e.g. aquariums etc.)- Spiritual experiences- Pure recreational (e.g. dining out, shopping)

In terms of specifically the economic approaches examined in the literature review (especially assessments of case studies), it was found that numerous studies focused on the economic impacts of tourism (mainly events tourism) with fragmented and limited research on CMT. The focus in the relation to CMT was generally on national and global or product specific (such as whale watching) contributions based primarily on tourism figures. Additionally, the main methodological approaches adopted were:

- Survey based (tourists/ visitors and tourism enterprises)
- Macro-economic analysis drawing on national economic data
- International datasets (for example, the United Nations Tourism World Organisation - UNTWO)

The desktop study also concluded that there were five main approaches to measure the economic impacts of CMT:

- Cost Benefit Analysis (CBA)
- Input-Output (I-O) models
- General equilibrium models
- Tourism Satellite Account (TSA)
- Time-series forecasting methods



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Further issues for consideration were noted. Firstly, addressing secondary benefits and multiplier effects were raised. This led to this research looking at both demand and supply side variables to capture some, but not all, of the secondary benefits or multiplier effects. It was agreed the users/ tourists/ customers of CMT products/ activities as well as various businesses and service providers. Secondly, concern was raised in the literature regarding the types, scope and quality of data/ information required linked to ensuring reliability and validity. The lack of consistent and good quality data prevents aggregation and disaggregation as well as undermines comparative and trend analyses. Issues were also raised in relation to sample sizes which will be critical to resolve in Phase 3 which is the implementation phase.

Given the above desktop findings, the following guidelines for the economic impact assessment of CMT were formulated:

- Simplify the system and approach
- Develop tools and data collection guidelines to improve data consistency and quality
- Adopt a consultative and collaborative process
- Permit comparative and trend analyses over time
- Research as well as monitoring and evaluation efforts on CTM need to be aligned and consolidated

2.2. Phase 2 activities

Phase 2 was essentially the piloting phase, guided by the following objectives:

- Workshop with key economists and researchers to identify data requirements in relation to methodological approaches to assess the economic impacts of CMT
- Consultation with Provinces and other key stakeholders
- Data audit in relation to macro and micro-economic modelling required
- Develop and pilot methodology (including the drafting of data collection instruments)
- Refinement and finalisation of framework for implementation

Based on the Key Economists Experts Forum Workshop held on the 28 June 2017 in Cape Town, it was agreed that time-series forecasting could not be undertaken at this stage given that this model requires a number of observations collected over time and baseline information on key indicators will be



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generated from the implementation of this project. Furthermore, it was decided that the general equilibrium models were inappropriate given their complexities and the types of information needed. Thus, from the five models that was identified during Phase 1 it was agreed that three will be piloted:

- CBA
- I-O
- TSA

Emanating from the literature review undertaken during Phase 1 and during the Key Economists Experts Forum Workshop, identifying key indicators is deemed to be critical step to inform the development of the surveys. The approach adopted was to delineate supply and demand side variables required for the economic modelling. A range of indicators and sources of specific types of information were identified. Specifically, the following aspects were highlighted:

- Definitions of coastal and CMT (spatial scope as well): it was agreed to limit the scope of CMT to four coastal provinces and oceans shoreline for the purposes of this project as indicated earlier.
- Validity and reliability of methodologies and sampling framework is important to consider. In terms of the sampling framework specifically, it is important to establish the number in relation to target populations for data collection.
- Extent to which impacts can be disaggregated is also important to consider. Specifically, to what extent can the spend by a user/ tourist or job creation be attributed to CMT? Questions in the survey were included to permit this type of analysis to be undertaken.

The CMT stakeholders from an economic perspective included:

- Coastal and marine tourism business owners
- Clients/ Customers/ Users
- Coastal and marine tourism and hospitality businesses
 - Accommodation
 - Tour operators
 - Restaurants and retail outlets (a short customer survey to accompany these surveys to establish whether CMT was the main reason for visiting the location)
- CMT stakeholder associations/ organisations

Surveys were developed for each of these stakeholders as attached in Appendix 1.



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The key indicators identified which was covered in the surveys included:

- Tourism/ visitor information (from visitors – including locals, accommodation sector, businesses, etc.)
 - Room occupancy vs bed occupancy
 - Where are tourists staying and for how long (types of accommodation and agreements)
 - Domestic versus foreign visitors
 - Spend patterns on specific categories (accommodation – tourists only, transport, cost for CMT products, food and beverages, coastal and marine tourism activity merchandise, shopping, other costs)
 - Size of immediate group (spending money together)
 - Motivation and main reasons for travel to location
- Businesses (accommodation, tour operators, restaurants and retailers)
 - Monthly expenditure (capital expenditure, salaries and wages, advertising and marketing, travelling, rates and taxes and other costs)
 - Monthly income (sales of coastal and marine tourism products, sponsorships, income from merchandise sales and other costs)
 - Use of services providers (number and amount paid on a monthly basis)
 - Number of clients/ customers and cost per client/ customer
 - Occupancy rates for accommodation sector
- Job creation (actual and type as well as potential and transformation imperatives)
 - Duration of employment
 - Permanent versus temporary/ casual
 - Disaggregation in relation to gender, historical racial category and location (local, regional or national)

As a result of time and budgetary constraints, engagements with stakeholders were limited to a smaller size of representatives from CMT organisations and service providers. Furthermore, the provincial consultation coincided with national meetings. The provincial consultation was specifically useful to:

- Solicit comments on the surveys and recommendations for revision
- Identify types of data and information at provincial levels (and how to access this information)



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- Identify types of research currently underway on coastal and marine tourism, if any
- Provide information on CMT stakeholder associations/ organisations to ensure that as many are approached for inputs and to participate in completing the survey
- Establish if contact details/ lists are available in relation to groups/ stakeholders that are targeted for survey-based data collection and ascertain how can the information be sourced if they exist
- Underscore the importance of consistency in the chosen methodologies across all provinces to ensure aggregation and comparative analyses

3. Fieldwork implementation

Survey data collection was completed for each of the following stakeholder groups:

- Clients/ customers/ users: 201
- Coastal and marine tourism business owners: 13
- Coastal and marine tourism and hospitality businesses
 - Accommodation: 21
 - Tour operators: 13
 - Restaurants and retail outlets (a short customer survey to accompany these surveys to establish whether CMT was the main reason for visiting the location): 26 (97 customer surveys completed)

Table 2 indicates the sampling distribution framework that was compiled in terms of targeted numbers and the final number of surveys completed per stakeholder group. The Table shows that with the exception of customer/ tourist/ user surveys, none of the other stakeholder targeted sample sizes were achieved. The challenges experienced are detailed later. It is also important to note in terms of data collection; surveys were not completed in the Northern Cape despite attempts to engage with provincial tourism officials to facilitate this. During Phase 3 it is imperative that CMT products and locations (including seasonality) be determined to ensure some level of coverage of Northern Cape. Surveys were mostly completed in KwaZulu-Natal followed by Western Cape and Eastern Cape.

Table 2: Sampling distribution framework and number of surveys completed



Surveys	KZN	WC	EC	NC	Total	Number completed
Customer/ tourist/ user	80	70	30	20	200	201
Accommodation	20	15	10	5	50	21
CMT business owners	25	20	15	10	70	13
Retail outlets and establishments (+ 5 customer surveys per site)	20	15	10	5	50	26 (97 customer surveys completed)
Tour operators	10	10	5	5	30	13

A key challenge experienced relate to the low response rates for all stakeholder categories, with the exception of the customer/ tourist/ user surveys. The main reasons for the low response rates were:

- Unwillingness to participate (especially among the supply side stakeholders such as accommodation and CMT businesses). In many instances, stakeholders refused to participate when approached despite being reassured of confidentiality, the purpose of the research being explained and a letter from the university being provided. This may have been linked to time constraints (although attempts were made to set up appointments for interviews to be conducted at the convenience of the respondent) and being busy. Furthermore, in cases when persons agreed to be interviewed, there did not wish to continue when asked for economic data regarding income and expenditure. Even when interviews where completed, many of these questions were not answered because the respondent did not know the information needed (especially disaggregated for the last 12 months) or considered it confidential. While customers/ users/ tourists were generally willing to participate, there were instances when some people did not want to complete the survey because they felt that it was a disturbing their leisure time.
- Unable to get permission to undertake surveys. Many CMT businesses are located within malls or shopping areas such as the V & A Waterfront in Cape Town and the uShaka Marine are in Durban. The fieldworkers were prevented from undertaking research in these areas.



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- Unable to locate/ access stakeholders (such as CMT businesses and tour operators). In the absence of contact lists for the different types of businesses it was difficult to locate some of the businesses such as tour operators and CMT businesses (for example, whale watching, fishing, boat cruises and shark diving businesses). Attempts were made to interview these groups at the sites of operation. Consumers/ users/ tourists were also interviewed while participating in activities that were more leisurely, for example, the isiMangaliso Estuary and Robben Island cruises.

In terms of issues relating to the data collection instruments specifically, the following general aspects were noted:

- Surveys too lengthy – the level of disaggregated information needed (last 12 months) resulted in surveys being too long which was the feedback received from respondents and fieldworkers. The consumers/ users/ tourists seem to work well. However, there will be a slight increase in the number of questions during Phase 3 given that there will be a greater focus on demand side data collection.
- Quality of data collected (especially self-completion surveys) – as indicated earlier, respondents were often unlikely to recall or chose not to provide income and expenditure information (including information about service providers used by the business. It is important to note that in the few instances when completed email surveys were received, questions were incomplete or there was evidence of the respondent not fully understanding the questions. This again related to the income and expenditure questions as well as the number of persons employed in the business

In terms of specific questions in the survey, the following were noted:

- There was generally poor recollection of monthly information among all stakeholder groups
- Difficulties were experienced in estimating proportions in relation to tour operators indicating proportion of clients interested in different tourism products, proportion of questions who were domestic and international visitors and proportion of clients attracted to location because of CMT products/ activities. In the accommodation survey, the proportionate questions on occupancy rates were also deemed to be difficult to answer. Some respondents even indicated that they were guessing since there was no basis/ information to validate these proportional estimations.



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- Generally, there was poor responses of questions relating to service providers used.
- Confidentiality challenges were experienced in relation to information on the number of employees and income and expenditure information
 - In the customers/ users/ tourists survey, question 1.2 in the screening questions and A6 should be merged into one question since the CMT activities that respondents are participating in are repeated.
- In terms of the CMT business surveys (business owners, accommodation, tour operators and retail outlets), given that this was regarded as being excessively lengthy:
 - The profile of businesses (Section A) requires too much information – essential information that informs the economic assessment should only be included.
 - As indicated earlier, income and expenditure information should not be disaggregated on a monthly basis but should be on an annual basis (for the last 12 months).
 - Information on expenditure and income should also be established for an average over the last 12 months rather than on a monthly basis (fieldworkers need to be trained that when the information is more accessible on a monthly basis, for example, salaries and wages then these need to be multiplied by 12 for an annual average) since in many categories expenditure (such as travelling, capital expenditure and advertising/ marketing) and income (such as sponsorships received) is not per month.
 - The question on the number of service providers used and average monthly spend should also be revised for an overall annual number used and amount paid.
 - Respondents were not prepared enough to answer questions that require information that want, for example, VAT included, because they do not have that information at hand.
- The general comment from the respondents was that the ranges for revenue/ income/ profits given were too small and should be increased.
- In relation to the accommodation and retail surveys, respondents (who were generally managers) did not have the authority or access to the information required. They indicated that the information needs to be sourced from other departments and it is unlikely that the types of information will be provided given that economic and employment information is regarded as sensitive and confidential.



- In relation to the restaurants and retail outlets, owners of the outlets were apprehensive towards data collectors interviewing their customers as they felt that it would be an inconvenience or irritation for them.

4. Economic modelling experiences

4.1. Tourism Satellite Accounts (TSA)

Like any other sector, tourism can be construed from two sides, namely, the demand and supply sides. On the demand side, tourism encompasses activities of tourists and their role in the acquisition of goods and services; and on the supply side, it may be described as the set of productive activities that cater mainly for tourists. Tourism is also a social, cultural and economic phenomenon which subsumes movements of people. The relationship between tourism and most economic activities has fostered interest in measuring its economic impact, and in evaluating the relationship with other social and economic activities. As a result, there has been an intensified quest for developing concepts, frameworks, databases and techniques with which this measurement could be made possible. To ensure cross-country comparability, UNWTO (2007) developed successive sets of international recommendations on tourism statistics (International Recommendations for Tourism Statistics - IRTS, 2008).

The commonly used approach is the TSA. This study, therefore, plans to use the TSA as one of three approaches to quantify the size of CMT in South Africa and assess the impact of CMT on the country's economy. Traditionally, the TSA has been used to measure the size of the tourism sector for the economy as a whole. A complete TSA as recommended by UNWTO provides:

- Macroeconomic aggregates that describe the size and the economic contribution of tourism, such as tourism direct gross value added (TDGVA) and tourism direct gross domestic product (TDGDP), consistent with similar aggregates for the economy, and for other productive economic activities and functional areas of interest.
- Detailed data on tourism consumption, a more extended concept associated with the activity of visitors as consumers, and a description on how this demand is met by domestic supply and



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imports, integrated within tables derived from Supply Use Tables (SUT), that can be compiled both at current and constant prices.

- Detailed production accounts of the tourism industries, including data on employment, linkages with other productive economic activities and gross fixed capital formation.
- A link between economic data and non-monetary information on tourism, such as number of trips (or visits), duration of stay, purpose of trip, modes of transport etc. which are required to specify the characteristics of the economic variables.

Although TSA is widely used, it is mainly descriptive in nature, and does not conclude any measurement of implicit and induced effect of visitor consumption on the economic system as a whole. This implies that tourism's impact on the economy is not fully reflected in the TSA tables and must therefore be measured and analysed using other means.

Given that TSA requires more information than what was compiled during the December 2017 - January 2018 data collection exercise, the original TSA tables were adjusted to suit the CMT project (see Appendix 2 for adjusted TSA tables). The implication of this adjustment is that this TSA cannot be directly compared to the national TSA. Nonetheless, the analysis permits a clearer view of whether or not CMT makes a significant contribution to South Africa's economy.

One of the problems faced during the modelling exercise was that the data that was collected was difficult to analyse and work with. This emanates from the team that collected and compiled the data working independently of the modelling team although information was inputted within Excel spreadsheets which was sent to the economic team for feedback. It was only when working with the complete datasets that challenges were noted. During Phase 3, this part of the study needs to be improved upon. The modelling team will be involved in overseeing the data collection and compilation exercise.

In addition, the data collection team reported difficulties in getting data from the business sector, that is, respondents in the business sector were unwilling to provide information (supply-side data). As a result, difficulties will be experienced to measure spill-over effects.



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Tables in Appendix 3 also make recommendations on the types of data that would be required in order to run robust and reliable analysis.

4.2. Input-Output (I-O)

The I-O analysis is a principal method for estimating recreation and tourism-related spending and the economic impacts of tourism in a country. The method involves collecting and analysing data on tourists and their spending. The assessments of spending can be translated into job creation and income generation in a given area using appropriate economic ratios and multipliers. The direct survey method is more appropriate to estimating impacts of particular actions (in this case tourism) on a local economy, that is, one could assess the impact of a new site encampment or a museum that will attract a given number of visitors to a particular country. These more focused impact studies normally include multiplier effects of tourist spending on the country, as they focus more directly on impacts using a “with versus without framework” to evaluate impacts of that particular action. CMT poses challenges given that the sites and activities are not discrete or venue-based.

Following Stynes (2001), the basic survey I-O approach can be given as:

- Tourist spending = Number of visitors multiplied by average spending per visitor
- Economic impact = Number of visitors multiplied by average spending per visitor multiplied by Regional Multipliers

As highlighted in Hallegatte (2008) and Miller and Blair (2009), in order to effectively estimate the economic impact of tourism on the economy using the above formulae, the following will have to be taken into consideration:

- Economic impacts may be estimated in terms of spending, sales, income, value added, tax revenues and employment.
- Estimating the number of visitors requires a clear definition of what a visitor (tourist) is and in what units tourism activity is measured in (for example, person trips, person nights, party nights or party trips).
- Reliable estimates of tourism activity and spending frequently require that tourists be divided into distinct segments with different spending patterns. Visitation estimates can be made from a variety of sources including surveys and various visitor counting methods.



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- Average spending of tourists on trips can be measured in visitor spending studies, either by sampling trips at destination areas or asking about recent trips in a household survey. Because spending varies widely across types of trips, a segmented approach is often recommended.
- Multipliers (and economic ratios) can be used to convert spending to income and jobs as well as to capture secondary impacts of tourist spending (multiplier effects). There are many distinct kinds of multipliers - ratio and Keynesian, Types I, II and III, sales, income and employment multipliers, aggregate and sector-specific multipliers. However, multipliers will vary with the economic characteristics of the study area and the kinds of spending/ sectors involved. An aggregate "tourism multiplier" must assume a given distribution of tourist spending and will vary from one area to another. When available, visitor spending may be applied to a complete I-O model of the CMT economy.

CMT poses challenges given that the sites and activities are not discrete or venue-based to permit accurate estimations of numbers. Volumes are also a problem since there can be repeat visitors to a site or those participating in activities on the same day or over several days.

4.3. Cost Benefit Analysis (CBA)

CBA is a practical way of assessing the desirability of projects, where it is important to take a long view (in the sense of looking at repercussions in the future) and a wide view (in the sense of allowing for side-effects), that is, it implies the enumeration and evaluation of all the relevant costs and benefits (Prest and Turvey, 1965). This involves drawing on a variety of traditional sections of economic study such as welfare economics, public finance, and resource economics, and trying to weld these components into a coherent whole (Prest and Turvey, 1965). The pilot phase of the CMT study is now at a point where we require coastal and/ or marine projects, hypothetical or otherwise, whose viability should be examined. This information should be provided by the Department of Tourism.

To carry out a CBA for any CMT project, all the applicable benefits and costs (just as the term CBA suggests) need to be identified. What is important to realise at the onset is the fact that for this particular study, a number of items will be known with reasonable accuracy. However, assumptions will



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have to be made for a sizeable amount of items that may not be measurable (Goldman, Nakazawa et al, 1995). The required data may include:

- An inventory of public support services with the present range and capacity of those facilities. Support services include policing, water supply, sewer disposal, rest rooms, streets lights, medical facilities, rescue systems, parks, solid waste arrangements, and camp grounds, among others. If the capacity of these facilities does not meet present and future demands, expansion of the facilities that are in short supply must be taken into account as a cost of tourist development. In doing this one also needs to look at the private support services (such as tour guides, hotel and motel rooms, restaurants and transportation) and check whether they should also be expanded.
- A projection of the number of visitors. This can be obtained with a reasonable degree of accuracy from the data that has been obtained in the survey. The projection is likely to become more accurate with subsequent surveys, especially if they are undertaken at regular intervals and the sample size is increased as well as visitor counts are sourced from relevant stakeholders.
- An estimate of the expenditures tourists will make. A rough estimate can be obtained by multiplying the expected increase in types of tourists (day visitors or overnight visitors) by the expenditures expected for each type, including any changes in expenditure levels expected with the new facilities. Again, this variable can be computed with a reasonable degree of accuracy from the survey data that has been collected with the likelihood that the accuracy will improve with subsequent surveys.
- Impact of visitors' expenditures on local revenues. Benefits that are commonly associated with CMT may increase local incomes and employment. This is a simulation that is based on the available data.
- Changes in taxes. This is a fiscal element. Any changes in taxation will have direct implications on the coastal and marine economy as well as on the fiscus.
- CMT may provide a means of diversifying the existing economy or reducing the seasonal fluctuations, depending on the nature of the seasonalities given that tourism itself is seasonal. In some instances, tourism itself can compound the challenges of seasonal variations in economic activities.
- Local festivals and celebrations are important cultural events and tourist attractions in many communities. Coastal and marine tourists may be significantly affected by these events.



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Any increase in demand for public services (extra police or improved rest rooms) is a cost of tourism development. If time is donated, the value of volunteer time may be calculated by multiplying hours worked by an appropriate wage rate, not lower than the minimum wage. The cost and benefits of tourism can be measured with varying degrees of precision. The items should be indicated with a plus for benefits and a minus for cost. Environmental cost and community resentment attributes are examples of negative items. However, these will not be part of the current CMT study.

After gathering all the relevant costs and benefits, these need to be inputted into a table and then subtracted from the total costs from the total benefits to come up with net measurable benefits. The future benefits and costs will have to be discounted to the present. If the net benefits are positive, this should suggest that the contribution of tourism towards GDP given the project being analysed must be positive (Goldman, Nakazawa et al., 1995). A template of the CBA is presented in Table 1 in Appendix 2.

Overall, development of CMT can be a positive economic step. However, it is imperative to carry out a CBA before investment in any tourism related activity is carried out. Through the application of a CBA, one is able to identify the likely economic impacts, whether directly measurable or extrapolated, of the CMT development. The economic team is awaiting confirmation of specific projects from the NDT, whether hypothetical or real, to carry out a CBA. Otherwise, Phase 3 will focus on the TSA and I-O approaches.

5. Phase 3 implementation framework

From the fieldwork and economic modelling experiences, the following lessons inform the Phase 3 implementation:

- Need to focus on demand side data collection (customer/ user/ tourist surveys) given the challenges experienced in relation to collecting primary data from other stakeholders.
- Revise specific survey questions to shorten the surveys and rethink approach to collecting information to cover seasonality in terms of asking questions for each month over the last year period. These questions will be revised to collect data on an annual basis. The actual fieldwork will be undertaken to cover seasonal periods (Winter and Summer vacations as well as the September vacation period as the peak seasons and periods in between will be regarded as



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off-peak. The revision of the surveys, especially the depth and scope of questions included in the customer/ user/ tourist survey, will be Step 1 of Phase 3 given the focus on demand side data collection. The other surveys will also be revised and streamlined to encourage higher response rates for all questions.

- Rethink sampling approach – in this regard it is imperative that national and provincial databases of the supply side stakeholders (for example, accommodation establishments and tour operators) can be accessed so that online and email surveys can be an option for survey completion. The piloting experience indicates that face-to-face interviews do not have a high response rate.

The following steps guide the implementation of Phase 3:

STEP 1: Revision of survey instruments

- Survey instruments will be revised based on Phase 2 experiences.
- A key economists and stakeholder workshop will be held in May 2018 to finalise survey revisions and Phase 3 implementation approach.

STEP 2: Preparation for fieldwork/ data collection

- Development of sampling framework, including target sample sizes for customers/ tourists/ users and other stakeholder groups depending on the availability databases with relevant contact details as well as a geographical/ spatial spread across the four coastal provinces on a proportionate basis given differences in CMT attractions and visitors.
- Training of field assistants in preparation for data collection.
- Generation of a data collection work plan to ensure peak and off-peak seasons are covered during the course of the year.

STEP 3: Fieldwork/ data collection and data inputting

- Data collection as per the sampling framework and work plan developed.
- Data inputting into Excel as required by and in consultation with the economists. This will be a continuous process as data is collected.
- Sourcing of available regional and national data.



STEP 4: Data analysis and compilation of report

This will have two components:

- Undertake economic modelling based on data collected.
- Develop a framework for future implementation.

STEP 5: Workshop to capacitate stakeholders on the framework

- Conduct a workshop in consultation with NDT to capacitate stakeholders on the framework.
- Revise and finalise the framework for future implementation based on workshop and other stakeholder inputs.

6. Conclusion

This report provides an overview of the piloting processes undertaken during Phase 2 of the project and reflects on the challenges and opportunities to assess the economic impacts of CMT. The methodological approach adopted was the implementation of stakeholder survey-based data collection tools. The key stakeholders identified were coastal and marine tourists/ users/ customers and CMT business (including the accommodation sector, CMT business owners, retail outlets and tour operators). The challenges in terms of data collection included ensuring a geographical and representative spread across all four coastal provinces, willingness to participate, quality of data collected (especially in relation to self-completion surveys) and the length of the surveys. Access to stakeholder contact details also emerged as a challenge. Finally, key recommendations in terms of developing the framework are in relation to revising the surveys piloted and data collection approach to be adopted during Phase 3. The piloting also revealed the need to revise some of the questions and rethink the number and types of stakeholders from whom primary data needs to be sourced. Addressing these issues will be Step 1 of Phase 3.

Phase 3 of the project is underway. The two key objectives of Phase 3 is:

- Implementation of the framework
- Conduct a workshop to capacitate stakeholders on the framework

As the implementation framework in the previous section indicates, key processes include revising the survey instruments, especially in the context of a more detailed focus on demand side data than supply



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side information given the challenges encountered. The importance of developing a standardised framework to measure, monitor and manage the economic impacts of CMT in South Africa remains. This research will inform the development of a framework to establish the economic impacts of CMT in South Africa.

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Appendix 1: Surveys piloted



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CLIENTS/ CUSTOMERS/ USERS/ TOURISTS

Date of interview: _____

Place of interview: _____

SCREENING QUESTIONS

1. Have you participated or will you participate in (specify type of coastal and marine tourism activity _____) today?

Yes	No
-----	----

1.1. If no, keep a record of the number of these persons encountered during the fieldwork period.

1.2. If yes, continue with survey and indicate which coastal and marine tourism activity you are participating in today.

Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)	
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)	
Scuba diving/snorkelling (e.g. shark cage diving)	
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding (SUP), yachting, water skiing, water surfing)	
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	
Coastal wildlife tourism (e.g. land-based whale watching, marine turtle tours)	
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)	
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)	
Sightseeing (e.g. light house tourism, cycling, marathons)	
Educational and scientific excursions (e.g. aquariums)	
Spiritual experiences	
Pure recreational (e.g. dining out, shopping)	
Other (specify)	

A. PROFILE OF RESPONDENTS

1. Are you an overnight visitor from out of town, a day visitor from out of town, or a local resident?

Overnight visitor from out of town	Day visitor from out of town	Local resident (from within town/city municipality)
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1.1 If you are a tourist (overnight out of town visitor) or day visitor, where are you from?

Outside South Africa	Country: _____
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South Africa	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
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2.1 How many persons are accompanying you who you are paying for or spending money as a group who are also participating in the coastal and marine tourism activity?

1	2	3	4	5	>5 (specify)
---	---	---	---	---	--------------

3. How many times previously have you participated in this type of coastal and marine tourism activity?

None	1	2	3	4	5	>5 (specify)
------	---	---	---	---	---	--------------

4. Would you participate in this type of coastal and marine tourism activity again?

Yes	No (provide a reason)
-----	-----------------------

5. Would you advise friends, relatives or colleagues to participate in this type of coastal and marine tourism activity again?

Yes, definitely	Possibly	No, definitely not
-----------------	----------	--------------------

6. What other types of coastal and marine tourism activities have or will you be participating in during this visit to this beach location? What other types of coastal and marine tourism activities are you, in the future, interested in participating in? (Mark all that apply)

	THIS VISIT		FUTURE
	Did	Will do	Future interest
Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)			
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)			
Scuba diving/snorkelling (e.g. shark cage diving)			
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding (SUP), yachting, water skiing, water surfing)			
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)			
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)			
Coastal wildlife tourism (e.g. land-based whale watching, marine turtle tours)			
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)			
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)			
Sightseeing (e.g. light house tourism, cycling, marathons)			
Educational and scientific excursions (e.g. aquariums)			
Spiritual experiences			
Pure recreational (e.g. dining out, shopping)			
Other (specify)			

B. CONSUMER EXPENDITURE BEHAVIOUR

1. Approximately how much money did or will you spend (inclusive of the immediate group you are spending money for) in relation to participating in coastal and marine tourism activities



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during this visit? (ALL including locals except for accommodation) (Please write: "0" if no expenditure or "x" = I cannot recall).

Item	Amount in Rands		None (O) or Cannot recall (X)
	Did	Will	
Coastal and marine tourism products/ activities (e.g. whale watching, shark diving, turtle tours, boat-based fishing)			
Food and drinks			
Coastal and marine tourism activity merchandise			
Shopping			
Transportation at the destination, including airfares and travel within South Africa only			
Accommodation (for tourists only)			
Other (e.g. entertainment, visits to attractions)			
Overall total estimate (most important figure to obtain)			

2. What was your primary/main reason for visiting this location where the coastal or marine activity you are participating in is taking place?

Participation in coastal and marine tourism activity	This beach/coastal location	Holiday	Business	Visiting friends and relatives (VFR)	Shopping	Other (specify)

3. If an overnight visitor from out of town, how many nights did/will you spend during your visit to X town (specify name of town where interview is being conducted) in paid accommodation (excludes VFR)?

None	1	2	3	4	5	Other (specify)

4. How did you travel from your place of residence/accommodation to this location today?

Private vehicle	Rental vehicle	Metered taxi (eg. Uber)	Minibus taxi	Bus	Other (specify)

D. DEMOGRAPHIC PROFILE

1. What is your age or can you provide with an age range? _____ years

18-20	21-30	31-40	41-50	51-60	61-70	70+ (specify)

2. Highest level of education completed.

No formal education	Primary completed (7 years of schooling)	Matric/secondary completed (> 7 years of schooling)	Certificate/diploma
Undergraduate degree	Postgraduate degree	Other (specify)	



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3. What is your monthly net income (after deduction of taxes) or can you provide us with a monthly income range?

None	R1 – R8000	R8 001 – R10 000	R10 001 – R20 000	R20 001 – R30 000	R30 001 – R40 000	R40 001 – R50 000	>R50 000 (specify)	Confidential
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4. INTERVIEWER TO NOTE

Gender of respondent		Historical racial category (South Africans only)					
Male	Female	African	White	Coloured	Indian	Don't know	Other (specify)

THANK YOU FOR YOUR PARTICIPATION! For queries contact:
Prof Urmilla Bob (UKZN)
bobu@ukzn.ac.za or 031 260 2501

COASTAL AND MARINE TOURISM BUSINESS OWNERS

Date of interview: _____

Place of interview: _____

A. PROFILE OF BUSINESS

1. Type of organisation/business

Non-Profit Organisation (NPO)	
Section 21	
Closed Corporation (CC)	
Sole Proprietor	
Proprietary Limited (PTY LTD)	
Other (specify)	



2. In which year did the business start its operations?

Year when business started its operations	
---	--

3. How many businesses/companies/branches are there in different locations in addition to where the interview is being conducted? _____

If other businesses/companies exist, please note that the responses for this survey should only focus on the business/company/branch where the interview is being conducted and not the company in its entirety.

3. In which year did the company's involvement in coastal and marine tourism activities start?

Year involvement started	
--------------------------	--

4. What is this business/company's Broad-based Black Economic Empowerment (BBBEE) status?

Don't know/NA	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8	Non-Compliant
---------------	---------	---------	---------	---------	---------	---------	---------	---------	---------------

5. What types of coastal and marine activities is the business/company involved in? (Mark all that apply)

Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)	
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)	
Scuba diving/snorkelling (e.g. shark cage diving)	
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding (SUP), yachting, water skiing, water surfing)	
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	
Coastal wildlife tourism (e.g. land-based whale watching, marine turtle tours)	
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)	
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)	
Sightseeing (e.g. light house tourism, cycling, marathons)	
Educational and scientific excursions (e.g. aquariums)	
Spiritual experiences	
Pure recreational (e.g. dining out, shopping)	
Other (specify)	
B. EXPENDITURE AND INCOME	

1. Which months were you open for business in the last 12 months?

Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec 17

2. What was this business/company's overall average monthly income for the last 12 months? Please indicate for each month actual amount or amount within categories below for each month.



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1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec 17

3. What was this business/company's overall average monthly expenditure for the last 12 months? Please indicate for each month actual amount or amount within categories below for each month.

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec 17

3.1. What is the average monthly expenditure (in Rands) for this business/company in the categories below? Please indicate 0, if not applicable. Please use the categories provided in the table below as an option to providing the actual amount.

EXPENDITURE ITEM	AMOUNT
Capital expenditure (eg. facilities, equipment, infrastructure)	
Salaries and wages	
Advertising and marketing (include media and broadcasting costs)	
Travelling	
Rates and taxes	
Other costs (specify)	
TOTAL EXPENDITURE	

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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2. What is the average monthly income for this business/company for coastal and marine tourism activities? Please use the categories provided in the table below as an option to providing the actual amount.

INCOME	AMOUNT
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Income from sales of coastal and marine tourism products	
Sponsorships received	
Income from merchandise sales	
Other (specify)	
TOTAL INCOME	

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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3. How many service providers did this company/business use in the different categories below during the last 12 months, and what were the average monthly amounts paid per category for the services provided? Provide multiple responses for monthly income and location of service provider, if there was more than one service provider for each category.

Type of Service Provider	Number of service providers	Average monthly amount paid for all service providers in the specific category (in Rands) (see codes below)	Where service provider/s is located? (see codes below)
Administration and management			
Hospitality and catering			
Transport logistics			
Safety and security			
Education and training			
Operations in relation to physical infrastructure (e.g. equipment, vehicles)			
Marketing, advertising, media and branding			
Cleaning			
Signage			
Other (specify)			
Total			



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Codes for average monthly income

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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Codes for location of service provider

1. Local (city/ town/ municipality where business/ company is located)	2. Regional (province where business/company is located)	3. National (in South Africa in other provinces)	4. International (outside South Africa)
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4. How many clients/customers does this business/company have on a monthly basis? Please indicate for each month average number or actual number within categories below.

1. > 5	2. 5-10	3. 11-20	4. 21-50	5. 50-100	6. > 100 (specify)
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Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec 17

4.1. On average, what is the amount spent by a client/customer (in Rands) on a monthly basis? Please indicate for each month actual amount or amount within categories below.

1. < R10 000	2. R10 001 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec 17

C. EMPLOYMENT

1. How many people did this business/company employ during the last 12 months on a permanent or temporary/casual basis as indicated below, excluding volunteers? Note: A volunteer is defined as an individual who voluntarily assists with the event for a small stipend, in-kind benefit (e.g. a free lunch) or without any financial or non-financial remuneration.

Duration	Number of employees
Permanent	
Temporary/Casual - 1 day	



Temporary/Casual - more than 1 day to a week	
Temporary/Casual - more than a week to a month	
Temporary/Casual - > month	
Fixed period Interns	
Other (specify)	

2. How many employees were male or female? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of employees	
	Male	Female
Permanent		
Temporary/Casual - 1 day		
Temporary/Casual - more than 1 day to a week		
Temporary/Casual - more than a week to a month		
Temporary/Casual - > month		
Fixed period interns		
Other (specify)		

3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of additional employees for the event					
	South Africans					Foreigners
	African	Coloured	White	Indian	Other	Foreigners
Permanent						
Temporary/Casual - 1 day						
Temporary/Casual - more than 1 day to a week						
Temporary/Casual - more than a week to a month						
Temporary/Casual - > Month						
Fixed period interns						
Other (specify)						

4. How many of these persons employed for were local (i.e. from the city or town where the business operates), regional (from the province from which the business operates) or national (South African)? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or NA.

Duration	Number of employees – local (city/town/municipality where business is located)	Number of employees – regional (province where business is located)	Number of employees – national (other provinces in South Africa)	Number of employees – international (outsider South Africa)



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Permanent				
Temporary/Casual - 1 day				
Temporary/Casual - more than 1 day to a week				
Temporary/Casual - more than a week to a month				
Temporary/Casual - > month				
Fixed period interns				
Other (specify)				

THANK YOU FOR YOUR PARTICIPATION! For queries contact:

Prof Urmilla Bob (UKZN)

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COASTAL TOURISM AND HOSPITALITY BUSINESSES: TOUR OPERATORS

Date of interview: _____

Place of interview: _____

Description type of tour operator: _____

A. PROFILE OF BUSINESS

1. How many years has the tour operator been in operation in this location? _____

2. What type of tour operator services do you provide?

Transport services	
Guided tours	
Other (specify)	

3. The tours/transport services provided by the company is best described by the following product descriptions. Please indicate the proportion/percentage of clients interested in the different products. The totals should add up to 100%.

	Tick if applicable	%
Primary coastal and marine related activity and interest groups		
Primary activity and interest groups not related to coastal and marine activities		
Both activities and interest groups related to and not related to coastal and marine activities (first two options above combined)		
Other (specify)		

B. RATES

1. How many clients/customers does this business/company have on a monthly basis for the different types of services provided and, on average, what is the amount spent per client/customer (in Rands)?

	Number of clients/customers	Spend per customer/client
Transport services		
Guided tours		
Other (specify)		

2. Which months were you open for business during the last 12 months?

Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec17



2.1. Please estimate the monthly number of clients/customers for the last 12 months for coastal and marine tourism groups only, and the average amount for each month spent per group. If closed for the month, insert a C. Please use the categories below for number of clients/customers and amount spent as an option to the actual figures.

	Jan1 7	Feb1 7	Mar1 7	Apr1 7	May1 7	Jun1 7	Jul1 7	Aug1 7	Sept1 7	Oct1 7	Nov1 7	Dec1 7
No.												
Am t												

Number of customers/clients

1. < 5	2. 5-10	3. 11-20	4. 21-50	5. 50-100	6. > 100 (specify)
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Amount spent

1. < R5 000	3. R5 000 – R10 000	2. R10 001 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	8. > R75 000 (Specify)
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3. Please indicate which months are regarded as your low (L) season and which are regarded as your high (H) season for coastal and marine tourism groups only? If closed for the month, insert a C.

M	Jan1 7	Feb1 7	Mar1 7	Apr1 7	May1 7	Jun1 7	Jul1 7	Aug1 7	Sept1 7	Oct1 7	Nov1 7	Dec1 7
L												
H												

3.1. Please indicate your high season rates including VAT in Rands per customer for coastal and marine tourism groups only. _____

3.2. Please indicate your low season rates including VAT in Rands per customer for coastal and marine tourism groups only. _____

3.3. Do you offer special group rates?

Yes	No
-----	----

3.3.1. If yes, please provide details of the special rates provided.

4. What is the total income/revenue generated by this business for the last 12 months for coastal and marine tourism groups only. Please indicate actual amount or amount within categories below. _____



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1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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5. Please estimate the total profit generated by the business for this last 12 months for coastal and marine tourism groups only. Please indicate actual amount or amount within categories below. _____

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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6. What is the average monthly expenditure (in Rands) for this business/company in the categories below? Please indicate 0, if not applicable. Please use the categories provided in the Table below as an option to providing the actual amount.

EXPENDITURE ITEM	AMOUNT
Capital expenditure (eg. facilities, equipment, infrastructure)	
Salaries and wages	
Advertising and marketing (include media and broadcasting costs)	
Travelling	
Rates and taxes	
Other costs (specify)	
TOTAL EXPENDITURE	

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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7. Has a change demand

Increase	Decrease	No change	Don't know
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there been in the for coastal and marine tourism products/experiences in the last 5 years?

C. SUPPLIERS

1. How many service providers does this company/business use in the different categories below, and what are the average monthly amounts paid per category for the services provided? Provide multiple responses if more than one service provider for each category for monthly income and location of service provider.

Type of Service Provider	Number of service	Average monthly amount paid for all service providers in	Where service provider is located? (see



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	providers	the specific category (in Rands) (see codes below)	codes below)
Administration and management			
Hospitality and catering			
Transport logistics			
Safety and security			
Education and training			
Operations in relation to physical infrastructure (e.g. equipment, vehicles)			
Marketing, advertising, media and branding			
Cleaning			
Signage			
Other (specify)			
Total			

Codes for average monthly income

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
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Codes for location of service provider

1. Local (city/town/ municipality where business/ company is located)	2. Regional (province where business/company is located)	3. National (in South Africa in other provinces)	4. International (outside South Africa)
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C. EMPLOYMENT

1. How many people does the tour operator business employ during the course of the year on a permanent or temporary/casual basis as indicated below, excluding volunteers? Note: A volunteer is defined as an individual who voluntarily assists with the event for a small stipend, in-kind benefit (e.g. a free lunch) or without any financial or non-financial remuneration.

Duration	Number of employees
Permanent	
Temporary/Casual - 1 day	
Temporary/Casual - more than 1 day to a week	
Temporary/Casual - more than a week to a month	
Temporary/Casual - > month	
Fixed period Interns	
Other (specify)	

2. How many employees were male or female? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of employees	
	Male	Female
Permanent		
Temporary/Casual - 1 day		
Temporary/Casual - more than 1 day to a week		
Temporary/Casual - more than a week to a month		
Temporary/Casual - > month		
Fixed period interns		
Other (specify)		

3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of additional employees for the event					
	South Africans					Foreigners
	African	Coloured	White	Indian	Other	Foreigners
Permanent						
Temporary/Casual - 1 day						
Temporary/Casual - more than 1 day to a week						
Temporary/Casual - more than a week to a month						
Temporary/Casual - > Month						
Fixed period interns						
Other (specify)						



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4. How many of these persons employed were local (i.e. from the city or town in which the business operates), regional (from the province in which the business operates) or national (South African)? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of employees – local (city/town/municipality where business is located)	Number of employees – regional (province where business is located)	Number of employees – national (other provinces in South Africa)	Number of employees – international (outsider South Africa)
Permanent				
Temporary/Casual - 1 day				
Temporary/Casual - 1 week				
Temporary/Casual - more than 1 day to a week				
Temporary/Casual - more than a week to a month				
Fixed period interns				
Other (specify)				

D. PROFILE OF CUSTOMERS

1. Please indicate the proportion/percentage of your quests who were domestic visitors and international/foreign visitors?

Domestic	%	Foreign	%
----------	---	---------	---

2. In your opinion, what proportion of your customers is attracted to the area because of coastal and marine tourism products/activities? _____

THANK YOU FOR YOUR PARTICIPATION! For queries contact:

Prof Urmilla Bob (UKZN)

bobu@ukzn.ac.za or 031 260 2501



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COASTAL TOURISM AND HOSPITALITY BUSINESSES: ACCOMMODATION

Date of interview: _____

Place of interview: _____

A. PROFILE OF BUSINESS

1. Type of accommodation establishment (multiple responses permitted)

1-3 Star Hotel	
4-5 Star Hotel	
Bed and breakfast (not Air B&B)	
Guesthouse	
Self-catering	
Resorts	
Lodges	
Private rentals (e.g. Air B&B)	
Caravan or camping	
Other (specify)	

2. In which year did the establishment start its operations?

Year when business started its operations	
---	--

B. OCCUPANCY RATES AND INCOME



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1. Number of rooms in the accommodation establishment (please indicate separate numbers if different types identified as per Table in A1)?

	Specify type linked to Question A1	Number of rooms
Type 1		
Type 2		
Type 3		

2. Which months were you open for business during the last 12 months?

	Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec17
Type 1												
Type 2												
Type 3												

2.1. Please estimate the monthly room occupancy rate of this establishment for the last 12 months. If closed for the month, insert a C.

	Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec17
Type 1 (%)												
Type 2 (%)												
Type 3 (%)												

3. Please indicate which months are regarded as your low (L) season and which are regarded as your high (H) season. If closed for the month, insert a C.

M	Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec17
L												
H												

3.1. Please indicate your high season room rates in Rands, including VAT, for each type of accommodation in this facility.

Type 1	
Type 2	
Type 3	

3.2. Please indicate your low season room rates in Rands, including VAT, for each type of accommodation in this facility.

Type 1	
--------	--



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Type 2	
Type 3	

4. How many nights do your guests stay for on average in percentage (please indicate separate percentages if different types of accommodation facilities identified as per Table above)? Total should add to 100%.

Nights	1	2	3	4	5	6	7	> 7 (specify)
Type 1 (%)								
Type 2 (%)								
Type 3 (%)								

5. How many persons occupy a room on average in percentage who are charged for (do not include if children stay for free, for example). (Please indicate separate percentages if different types of accommodation facilities were identified as per the table above)?

Number	1	2	3	4	> 4 (specify)
Type 1 (%)					
Type 2 (%)					
Type 3 (%)					

6. What is the total income/revenue generated by this accommodation establishment during the last 12 months? Please use the categories provided in the table below as an option to providing the actual amount.

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
--------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	--------------------------------	----------------------------

6.1. Please indicate the approximate percentage of the income/revenue generated in the different categories over the last 12 months. They should add up to 100%.

Room rentals	
Food and drink sales	
Gift shop/retail sales	
Other (specify)	

7. Please estimate the total profit generated by the accommodation establishment for the last 12 months. Please use the categories provided in the table below as an option to providing the actual amount.

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
--------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	--------------------------------	----------------------------



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	000	000	000	000	000	000	
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8. What was the average expenditure (in Rands) for this accommodation establishment in the categories below during the last 12 months? Please indicate 0, if not applicable. Please use the categories provided in the table below as an option to providing the actual amount.

EXPENDITURE ITEM	AMOUNT
Capital expenditure (eg. facilities, equipment, infrastructure, etc.)	
Salaries and wages	
Advertising and marketing (include media and broadcasting costs)	
Travelling	
Rates and taxes	
Other costs (specify)	

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)

C. EMPLOYMENT

1. How many people does this accommodation establishment employ during the course of a year on a permanent or temporary/casual basis as indicated below, excluding volunteers? Note: A volunteer is defined as an individual who voluntarily assists with the event for a small stipend, in-kind benefit (e.g. a free lunch) or without any financial or non-financial remuneration.

Duration	Number of employees
Permanent	
Temporary/Casual - 1 day	
Temporary/Casual - more than 1 day to a week	
Temporary/Casual - more than a week to a month	
Temporary/Casual - > month	
Fixed period Interns	
Other (specify)	

2. How many employees were male or female? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of employees	
	Male	Female
Permanent		
Temporary/Casual - 1 day		
Temporary/Casual - more than 1 day to a week		



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Temporary/Casual - more than a week to a month		
Temporary/Casual - > month		
Fixed period interns		
Other (specify)		

3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of additional employees for the event					
	South Africans					Foreigners
	African	Coloured	White	Indian	Other	Foreigners
Permanent						
Temporary/Casual - 1 day						
Temporary/Casual - more than 1 day to a week						
Temporary/Casual - more than a week to a month						
Temporary/Casual - > Month						
Fixed period interns						
Other (specify)						

4. How many of these persons employed were local (i.e. from the city or town in which the business operates), regional (from the province in which the business operates) or national (South African)? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of employees – local (city/town/municipality where business is located)	Number of employees – regional (province where business is located)	Number of employees – national (other provinces in South Africa)	Number of employees – international (outsider South Africa)
Permanent				
Temporary/Casual - 1 day				
Temporary/Casual - more than 1 day to a week				



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Temporary/Casual - more than a week to a month				
Temporary/Casual - > month				
Fixed period interns				
Other (specify)				

D. PROFILE OF GUESTS

1. Please indicate the proportion/percentage of your guests who were domestic visitors and international/foreign visitors?

Domestic	%	Foreign	%
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2. In your opinion, what proportion of your guests are attracted to the area primarily because of coastal and marine tourism products/activities? _____

THANK YOU FOR YOUR PARTICIPATION! For queries contact:
Prof Urmilla Bob (UKZN)
bobu@ukzn.ac.za or 031 260 2501

COASTAL TOURISM AND HOSPITALITY BUSINESSES: RESTAURANTS AND RETAIL OUTLETS

Date of interview: _____

Place of interview: _____

Description type of outlet/ establishment: _____

A. PROFILE OF BUSINESS

1. In which year did the business start its operations? _____

2. How many other businesses/ branches are there in different locations in addition to where the interview is being conducted? _____

If other businesses exist, please note that the responses for this survey should only focus on the business where the interview is being conducted and not the company in its entirety.

3. What type of services do you provide? Multiple responses

Restaurant (food and beverages)	
---------------------------------	--



Clothing apparel	
Arts and crafts	
Other (specify)	

B. RATES

1. Which months where you open for business in the last 12 months?

Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jul 17	Aug 17	Sept 17	Oct 17	Nov 17	Dec17

2. Please estimate the number of clients/customers for the last 12 months. If closed for the month, insert a C. Please indicate for each month average number or actual number within categories below.

M	Jan1 7	Feb1 7	Mar1 7	Apr1 7	May1 7	Jun1 7	Jul1 7	Aug1 7	Sept1 7	Oct1 7	Nov1 7	Dec1 7
No												

1. > 5 2. 5-10 3. 11-20 4. 21-50 5. 50-100 6. > 100 (specify)

3. Please indicate which months are regarded as your low (L) season and which are regarded as your high (H) season? If closed for the month, insert a C.

M	Jan1 7	Feb1 7	Mar1 7	Apr1 7	May1 7	Jun1 7	Jul1 7	Aug1 7	Sept1 7	Oct1 7	Nov1 7	Dec1 7
L												
H												

3.1. Please indicate the average spend per customer in Rands during the high season, including VAT? _____

3.2. Please indicate the average spend per customer in Rands during the low season, including VAT? _____

4. What is the total income/revenue generated by this business during the last 12 months? Please indicate actual amount or amount within categories below.

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
--------------	----------------------	----------------------	----------------------	----------------------	----------------------	-----------------------	-------------------------

5. Please estimate the total profit generated by this business for the last 12 months? Please indicate actual amount or amount within categories below. _____



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1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
--------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	--------------------------------	----------------------------

6. What is the average monthly expenditure (in Rands) for this business/company in the categories below? Please indicate 0, if not applicable. Please use the categories provided in the table below as an option to providing the actual amount.

EXPENDITURE ITEM	AMOUNT
Capital expenditure (eg. facilities, equipment, infrastructure)	
Salaries and wages	
Advertising and marketing (include media and broadcasting costs)	
Travelling	
Rates and taxes	
Other costs (specify)	

1. < R10 000	2. R10 000 – R20 000	3. R20 001 – R30 000	4. R30 001 – R40 000	5. R40 001 – R50 000	6. R50 001 – R75 000	7. R75 001 – R100 000	8. > R100 000 (Specify)
--------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	-------------------------------	--------------------------------	----------------------------

6. In the last 5 years has there been an increase, decrease or no change in the number of customers?

Increase	Decrease	No change	Don't know
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C. SUPPLIERS

1. How many service providers does the company/business use in the different categories below, and what are the average monthly amounts paid per category for the services provided? Provide multiple responses if more than one service provider for each category for monthly income and location of service provider.

Type of Service Provider	Number of service providers	Average monthly amount paid for all service providers in the specific category (in Rands) (see codes below)	Where service provider is located? (see codes below)
Administration and management			
Hospitality and catering			
Transport logistics			
Safety and security			
Education and training			
Operations in relation to physical infrastructure (e.g. equipment, vehicles)			
Marketing, advertising, media and branding			
Cleaning			
Signage			
Other (specify)			
Total			

Codes for average monthly income

1. < R10	2. R10 000	3. R20 001	4. R30 001	5. R40 001	6. R50 001	7. R75 001	8. > R100 000 (Specify)
----------	------------	------------	------------	------------	------------	------------	-------------------------



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000	- R20 000	- R30 000	- R40 000	- R50 000	- R75 000	- R100 000	
-----	--------------	--------------	--------------	--------------	--------------	---------------	--

Codes for location of service provider

1. Local (city/town/ municipality where business/ company is located)	2. Regional (province where business/company is located)	3. National (in South Africa in other provinces)	4. International (outside South Africa)
--	--	--	---

D. EMPLOYMENT

1. How many people does this business employ during the course of the year on a permanent or temporary/ casual basis as indicated below, excluding volunteers? Note: A volunteer is defined as an individual who voluntarily assists with the event for a small stipend, in-kind benefit (e.g. a free lunch) or without any financial or non-financial remuneration.

Duration	Number of employees
Permanent	
Temporary/Casual - 1 day	
Temporary/Casual - more than 1 day to a week	
Temporary/Casual - more than a week to a month	
Temporary/Casual - > month	
Fixed period Interns	
Other (specify)	

2. How many employees were male and female? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of employees	
	Male	Female
Permanent		
Temporary/Casual - 1 day		
Temporary/Casual - more than 1 day to a week		
Temporary/Casual - more than a week to a month		
Temporary/Casual - > month		
Fixed period interns		
Other (specify)		



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3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of additional employees for the event					
	South Africans					Foreigners
	African	Coloured	White	Indian	Other	Foreigners
Permanent						
Temporary/Casual - 1 day						
Temporary/Casual - more than 1 day to a week						
Temporary/Casual - more than a week to a month						
Temporary/Casual - > Month						
Fixed period interns						
Other (specify)						

4. How many of these persons employed were local (i.e. from the city or town in which the business operates), regional (from the province in which the business operates) or national (South African)? Please make sure totals add up to the totals in Table 1 above. Please leave blank if none or N/A.

Duration	Number of employees – local (city/town/municipality where business is located)	Number of employees – regional (province where business is located)	Number of employees – national (other provinces in South Africa)	Number of employees – international (outsider South Africa)
Permanent				
Temporary/Casual - 1 day				
Temporary/Casual - more than 1 day to a week				
Temporary/Casual - more than a week to a month				
Temporary/Casual - > month				



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Fixed period interns				
Other (specify)				

E. PROFILE OF GUESTS

1. Please indicate the proportion/percentage of your clients who were domestic visitors and international/foreign visitors?

Domestic	%	Foreign	%
----------	---	---------	---

2. In your opinion, what proportion of your customers is attracted to the area because of coastal and marine products/activities? _____

THANK YOU FOR YOUR PARTICIPATION! For queries contact:

Prof Urmilla Bob (UKZN)

bobu@ukzn.ac.za or 031 260 2501

COASTAL TOURISM AND HOSPITALITY BUSINESSES: RESTAURANTS AND RETAIL CUSTOMER SURVEY

Date of interview: _____

Place of interview: _____



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Description type of outlet/ establishment: _____

1. What was your primary/main reason for visiting this location? (One response only)

The coastal and marine activities and facilities in the area	
Vacation at a beach destination	
Vacation but not because of beach destination	
Business	
Visiting friends and relatives (VFR)	
Shopping	
Other (specify)	

2. Did or will you be participating in any coastal and marine activities during this visit to this beach location? (Mark all that apply)

No/not applicable	
Wildlife tourism (e.g. whale watching, turtle tours, seals, dolphins)	
Recreational fishing (e.g. boat-based fishing, spear fishing, fishing competitions)	
Scuba diving/snorkelling (e.g. shark cage diving)	
Water sports (e.g. big wave surfing, kite surfing, stand up paddle boarding (SUP), yachting, water skiing, water surfing)	
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	
Events (e.g. marine festivals and marine competitions such as yacht races or regattas, fishing competitions)	
Coastal wildlife tourism (e.g. land-based whale watching, marine turtle tours)	
Sand/beach recreational activities (e.g. swimming, walking or running, kite-flying, beach combing, sand dune surfing)	
Coastal heritage activities (e.g. local seafood and cultural tourism, cultural history)	
Sightseeing (e.g. light house tourism, cycling, marathons)	
Educational and scientific excursions (e.g. aquariums)	
Spiritual experiences	
Pure recreational (e.g. dining out, shopping)	
Other (specify)	



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CMT STAKEHOLDER ASSOCIATIONS/ ORGANISATIONS

Key Informant Interviews

The interview will cover the following aspects:

1. Overview of association and stakeholders/groups represented, including when formed and why
2. Process to become members and membership fees, if any
3. If membership has increased or decreased and why? How are members recruited?
4. If contact details/lists if members are available (if available, process to access information and willingness to assist to provide contacts for appointments when interviewing members)
5. Types of data available and if the association/membership undertakes research
6. How does the association/organisation source resources?
7. What are the benefits (e.g. insurance, suppliers) of being affiliated/a member of the organisation/ association?
8. What marketing approaches are used?
9. What types of standards, if any, within the sector are in place and what is the role of the association/ organisation in relation to maintaining standards?
10. What are the opportunities linked to CMT in South Africa, especially in relation to activity/aspect that the association/organisation is involved in?
11. What are the challenges linked to CMT in South Africa, especially in relation to activity/aspect that the association/organisation is involved in?



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Appendix 2: Estimated costs and benefits of tourism

	BENEFITS PER YEAR (R)	COSTS PER YEAR (R)
1. Local Income Wages, Business profits, interest and rents SUB TOTAL	R R <hr/> R	R R <hr/> R
2. Local Tax Revenues Bed Tax Property Tax SUB TOTAL	R R <hr/> R	R R <hr/> R
3. Support Services -Parking lot expansion -Rest rooms (amortized construction and operation) -Petrol car (amortized purchase and operation) -Police officer (benefit and salary) -Street repair (measure cost usually local govt) SUB TOTAL	R R R R <hr/> R	R R R R <hr/> R



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4. Environmental Impact		
Solid waste collection and disposal	-/+	-/+
Sewer	-/+	-/+
Water	-/+	-/+
SUB TOTAL	-/+	-/+
5. Congestions at local parks	-/+	-/+
TOTALS		
Net benefits = Benefits per year – costs per year		
Benefits costs ratio		

Unmeasurable. Check the appropriate box

Pluses outweigh the minuses

Too close to call

Minuses outweigh the pluses

Additional tax revenues

R

Additional public costs

R

Net public sector impact

R



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Appendix 3

Figure 1. List of categories of tourism characteristic consumption products and tourism characteristic activities	
Products	Activities
1. Accommodation services for visitors	1. Accommodation for visitors
2. Food and beverage serving services	2. Food and beverage serving activities
3. Railway passenger transport services	3. Railway passenger transport
4. Road passenger transport services	4. Road passenger transport
5. Water passenger transport services	5. Water passenger transport
6. Air passenger transport services	6. Air passenger transport
7. Transport equipment rental services	7. Transport equipment rental
8. Travel agencies and other reservation services	8. Travel agencies and other reservation services activities
9. Cultural services	9. Cultural activities
10. Sports and recreational services	10. Sports and recreational activities
11. Country-specific tourism characteristic goods	11. Retail trade of country-specific tourism characteristic goods
12. Country-specific tourism characteristic Services	12. Country-specific tourism characteristic activities

Figure 2. Classification of products and tourism industries	
Products	Tourism industries
A. Consumption products	
A.1 Tourism characteristic products	
1. Accommodation services for visitors	1. Accommodation for visitors
1.a – Accommodation services for visitors other than 1.b	1.a. Accommodation for visitors other than 1.b
1.b – Accommodation services associated with all types of vacation home ownership	1.b Accommodation associated with all types of vacation home ownership
2. Food and beverage serving services	2. Food and beverage serving industry
3. Railway passenger transport services	3. Railway passenger transport
4. Road passenger transport services	4. Road passenger transport
5. Water passenger transport services	5. Water passenger transport
6. Air passenger transport services	6. Air passenger transport
7. Transport equipment rental services	7. Transport equipment rental
8. Travel agencies and other reservation services	8. Travel agencies and other reservation services industry
9. Cultural services	9. Cultural industry
10. Sports and recreational services	10. Sports and recreational industry
11. Country-specific tourism characteristic goods	11. Retail trade of country-specific tourism characteristic goods
12. Country-specific tourism characteristic Services	12. Country-specific tourism characteristic Industries
A.2 Tourism connected products	



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A.3 Non tourism related consumption products	
B. Non consumption products	
B.1 Valuables	
B.2 Other non consumption products	



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Coastal and Marine Tourism expenditure by products and classes of visitors

Products	Tourism expenditure
	Visitors (1.3) = (1.1) + (1.2)
<p>A. Consumption products (*)</p> <p>A.1 Tourism characteristic products</p> <p>1 – Accommodation services for visitors</p> <p>1.a – Accommodation services for visitors other than 1.b</p> <p>1.b – Accommodation services associated with all types of vacation home ownership</p> <p>2 – Food and beverage serving services 3</p> <p>– Railway passenger transport services 4</p> <p>– Road passenger transport services</p> <p>5 – Water passenger transport services</p> <p>6 – Air passenger transport services</p> <p>7 – Transport equipment rental services</p> <p>8 – Travel agencies and other reservation services</p> <p>9 – Cultural services</p> <p>10 – Sports and recreational services</p> <p>11 – Country-specific tourism characteristic goods</p> <p>12 – Country-specific tourism characteristic services</p>	



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A.2 Other consumption products (a) B.1 Valuables	
TOTAL	

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

(a) If relevant and feasible, countries should separately identify both components ("tourism connected products" and "non-tourism related consumption products"). In both cases, goods and services should be separately identified, if possible (see para. 4.15.).



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Production accounts of tourism industries and other industries (at basic prices)

Prod ucts	TOURISM I NDUSTRIES															Oth er indu strie s	Output of domesti c produc es (at basic prices)
	1 - Accom modati on for visitors	1 - a. accom modati on service s for visitors except in 1-b	1 - b. accom modati on service s associ ated with all types of vacatio n home owners hip	2 - Food and bever age servi ng indu stry	3- Rail way pass enge r tran spor t	4 - Roa d pass enge r tran spor t	5 - Wat er pass enge r tran spor t	6 - Air pass enge r tran spor t	7 - Tran spor t equi pme nt rent al	8- Travel agenc ies and other reser vation servic es indu stry	9- Cult ural indu stry	10- Sport s and recre ation al indu stry	11 - Retail trade of count ry- specif ic touris m chara cterist ic goods	12- Countr y specifi c touris m industr ies	TOT AL		
	(5.1)	(5.1a)	(5.1b)	(5.2)	(5.3)	(5.4)	(5.5)	(5.6)	(5.7)	(5.8)	(5.9)	(5.10)	(5.11)	(5.12)	(5.13)	(5.14)	(5.15) ±



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<p>A. Consumption products (*)</p> <p>A.1 Tourism characteristic products</p> <p>1 – Accommodation services for visitors</p> <p>1.a – Accommodation services for visitors other than 1.b</p> <p>1.b – Accommodation services associated with all types of vacation home ownership</p> <p>2 – Food and beverage serving services</p> <p>3 – Railway passenger transport services</p> <p>4 – Road passenger transport services</p> <p>5 – Water passenger transport services</p> <p>6 – Air passenger transport services</p>														
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services 7 – Transport equipment rental services 8 – Travel agencies and other reservation services 9 – Cultural services 10 – Sports and recreational services 11 – Country-specific tourism characteristic goods 12 – Country-specific tourism characteristic services A.2 Other consumption products (a) B. Non consumption products B.1 Valuables B.2 Other non consumption products (**) (b)																		
I. TOTAL OUTPUT (at basic prices)																		
II. TOTAL INTERMEDIATE CONSUMPTION (at																		



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purchasers price) (c)																	
(I - II) TOTAL GROSS VALUE ADDED (at basic prices)																	
Compensation of employees																	
Other taxes less subsidies on production																	
Gross mixed income																	
Gross operating surplus																	

Total domestic supply and internal tourism consumption (at purchasers' prices)

(*)

Products	TOURISM INDUSTRIES						Other industries	Output of domestic producers (at basic prices)	Imports*	Taxes less subsidies on products nationally produced and imported	Trade and transport margins	Domestic supply (at purchasers' prices)	Internal tourism consumption	Tourism ratio (s)
	1 - Accommodation for visitors	1 - a. accommodation services for visitors except in 1-b	1 - b. accommodation services associated with all types of vacation home	...	12- Country specific tourism industries	TOTAL								



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			ownership																					
	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)	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)	output	tourism share (in value)				
	(5.1)	(5.1 a)	(5.1 b)	(5.1 b)	(5.1 c)	(5.1 d)	(5.1 e)	(5.1 f)	(5.1 g)	(5.1 h)	(5.1 i)	(5.1 j)	(5.1 k)	(5.1 l)	(5.1 m)	(5.1 n)	(5.1 o)	(5.1 p)	(5.1 q)	(5.1 r)	(6.4) = (5.15) + (6.1) + (6.2) + (6.3)	(4.3)	(6.5) (4.3) x 100 (6.4)	
A. Consumption products (*)																								
A.1 Tourism characteristic products (d)																					X	X		
1 – Accommodation services for visitors																				X	X			
1.a – Accommodation services for visitors other than 1.b																				^	^			
1.b – Accommodation services associated with all types of vacation home																				^	^			



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Employment in the tourism industries

Tourism industries	Number of establishments	Number of jobs by status in employment (*)						Number of hours worked by status in employment (*)						Number of full-time equivalent jobs 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																			



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8 – Travel agencies and other reservation services industry																			
9 – Cultural industry																			
10 – Sports and recreational industry																			
11 – Retail trade of country-specific tourism characteristic goods																			
12 – Country specific tourism industries																			
TOTAL																			



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Tourism gross fixed capital formation of tourism industries and other industries

Products	TOURISM INDUSTRIES															14 – Other industries	15 – Tourism gross fixed capital formation
	1 – Accommodation for visitors	1 – a. accommodation services for visitors except in 1-b	1 – b. accommodation services associated with all types of vacation home ownership	2 – Food and beverage serving industry	3 – Railway passenger transport	4 – Road passenger transport	5 – Water passenger transport	6 – Air passenger transport	7 – Transport equipment rental	8 – Travel agencies and other reservation services industry	9 – Cultural industry	10 – Sports and Recreational industry	11 – Retail trade of country-specific tourism characteristic goods	12 – County specific tourism industries	13 – TOTAL		
	(8.1)	(8.1a)	(8.1b)	(8.2)	(8.3)	(8.4)	(8.5)	(8.6)	(8.7)	(8.8)	(8.9)	(8.10)	(8.11)	(8.12)	(8.13)	(8.14)	(8.15) = (8.13) + (8.14)



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<p>i. Tourism specific fixed assets</p> <p>1. Accommodation for visitors</p> <p>1.1. Hotels and other accommodation facilities for visitors</p> <p>1.2. Vacation homes under full ownership</p> <p>1.3. Vacation homes under other forms of ownership</p> <p>2. Other non residential buildings and structures proper to tourism industries</p> <p>2.1. Restaurants and similar buildings for food and beverage serving services</p> <p>2.2. Buildings and infrastructure for the long distance transport of passengers</p> <p>2.3. Buildings for cultural and similar services mainly for use by visitors</p> <p>2.4. Facilities for sport, recreation and entertainment</p>																	
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x



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2.5. Other facilities and structures																		
3. Passenger transport equipment for tourism purposes																		
3.1. Land (including road and rail)																		
3.2. Sea																		
3.3. Air																		
4. Other machinery and equipment specialized for the production of tourism characteristic products																		
5. Improvements of land used for tourism purposes																		
ii. Investment by the tourism industries in other non tourism-specific produced assets																		
TOTAL																		
Memorandum item:																		



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III. Other non-financial assets (*)															
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Tourism collective consumption by products and levels of government

Products (*)	Levels of government			Tourism collective consumption (9.4)= (9.1)+(9.2)+(9.3)	Memorandum item (**) Intermediate consumption by the tourism industries
	National (9.1)	Regional (9.2)	Local (9.3)		



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85561	Tourism promotion services					
85562	Visitor information services					X
91135	Administrative services related to the distributive and catering trade, hotels and restaurants					
91136	Administrative services related to tourism affairs					X
Part of:						
83700	Market research and public opinion polling services					X
91260	Police and fire protection services					
92219	Other education and training					
92920	Educational support services					X
TOTAL						