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**Development of a framework to assess the
economic impact of coastal and marine tourism
in South Africa: Training Manual**

University of KwaZulu-Natal

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Phase 1 (undertaken in 2016/2017) was a desktop study which included a review of the relevant literature which examined national and international perspectives 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 CMT's contribution to South Africa's tourism sector. The desktop study highlighted several themes including:

- 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

Current economic impact studies focused primarily on economic impacts of CMT events in specific locations as well as national and global contexts or product specific contributions (such as whale watching and shark diving). These case studies were limited and fragmented. The main methodological approaches used were survey-based (tourists/ visitors and tourism enterprises), macro-economic analysis drawing on national economic data and use of international datasets.

This Phase also identified appropriate economic indicators and models, specifically Cost Benefit Analysis (CBA), Input-Output (I-O), Tourism Satellite Account (TSA), general equilibrium models and time-series forecasting methods.

Phase 2 of the study which was undertaken in 2017/2018 and focused on developing and piloting data collection surveys and examining which economic modelling approaches were appropriate to assess the economic contribution of CMT to South Africa's tourism sector. An initial critical assessment of the application of the five economic models identified during Phase 1 revealed that the general



equilibrium models (which focuses on the changes in the economic contribution that result from specific events or activities that comprise 'shocks' to tourism demand which generate direct, indirect and induced effects) and time-series forecasting methods (used to predict tourism demand for specific tourism locations) were unlikely to yield results given the lack of relevant data (including baseline information) required for these models in the South African context. Data collection instruments were developed to pilot the following economic models during Phase 2:

- Cost Benefit Analysis (CBA): tool used either to rank projects or to choose the most appropriate option and the ranking or decision is based on expected economic costs and benefits
- Input-Output (I-O) models: used to study the environmental, social and economic repercussions and impacts of human activities – focus is on direct, indirect and induced demand as well as multiplier effects using specific indicators such as Gross Domestic Product (GDP), labour income and employment.
- Tourism Satellite Account (TSA): TSA is the single most important new macro-economic policy analysis tool developed in the last several decades to measure tourism demand and its implications for a national economy. TSA is a method of measuring the direct economic contributions of tourism expenditure to a national economy using the System of National Accounts.

During Phase 2, the following data collection instruments/ surveys were piloted in relation to specific CMT stakeholders identified which was the basis for the overall study conducted in Phase 3:

- Demand-side
 - Clients/ Customers/ Users (Appendix 1)
- Supply-side
 - CMT business owners (Appendix 2)
 - Accommodation (Appendix 3)
 - Tour operators (Appendix 4)
 - Restaurants and retail outlets (Appendix 5A) together with a short customer survey to accompany these surveys to establish whether CMT was the main reason for visiting the location (Appendix 5B)



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In terms of the survey component of the study, the main research questions related to:

- What are the socio-economic profiles of CMT demand-side (tourists/ customers/ users) and supply-side (accommodation, tour operators, retail and restaurant businesses/ establishments, and CMT business owners) stakeholders?
- What are the income and expenditure patterns of the demand and supply-side stakeholders?
- What types of CMT products are being consumed and/or what types of CMT activities are users participating in?
- What types of accommodation are being used and what is the length of stay?
- How do users/ consumers/ tourists perceive the CMT destination/ location?
- In relation to the demand-side stakeholders:
 - How many service providers do they use, what is their profile and how much do they pay for these services?
 - What is the profile (age, gender, racial background and location) of the persons employed in relation to temporary and permanent jobs created?
 - What are the high and low seasons in relation to CMT activities?
 - What are the average number of clients or occupancy rates of establishments?

Phase 2 revealed that demand-side data (from CMT customers/ users/ tourists) were easier to collect than the supply-side data (from the accommodation sector, CMT business owners, tour operators and retail outlets and establishments) with substantially lower response rates linked to the lack of databases or the researcher team's inability to access local and provincial databases with contact details to target the supply-side stakeholders and unwillingness to participate in the research. The surveys were also found to be too lengthy with difficulties experienced in terms of the respondent providing detailed information in relation to income and expenditure data. Phase 2 also concluded that TSA and the I-O models were the more appropriate ones to generate valid and reliable economic impacts rather than CBA approach since the types of data available could not establish all the applicable costs and benefits that are required to be inputted into the model.



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From the fieldwork and economic modelling experiences during Phase 2, the following lessons informed 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.
- Specific survey questions were shortened in the surveys and revised to collect information to cover seasonality in terms of asking questions for each month over the last year period. These questions were revised to collect data on an annual basis.

Phase 3 entailed a full-scale study on the methodological framework developed in Phase 2. This Training Manual provides a guide to undertake research to assess the economic impacts of CMT. It can also be adapted to undertake locational/ provincial/ regional level as well as sector specific or event/ activity tourism economic impacts. The information can support effective decision-making and policy interventions.

While a methodological framework has been developed and is the basis for this Training Manual, it is imperative from the onset that it is acknowledged that assessing the economic impacts of CMT is extremely complex, especially given that there is a lack of a standardised and accepted methodology to measure CMT economic impacts as indicated earlier. Which activities are CMT-related are also important to consider together with what constitutes spatially a CMT 'zone'/ location. Additionally, it is important to underscore that there are several direct and indirect/ induced economic impacts as well as various demand-side stakeholders who benefit from CMT. Furthermore, in South Africa (and globally) there is currently limited data available relating to the economic impacts of CMT. There is therefore inadequate economic information available in relation to CMT (and the oceans economy more generally), although the South African government has plans to accelerate growth and development by unlocking the potential of CMT to create jobs and improve socio-economic conditions of previously disadvantaged communities linked to Operation Phakisa.



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2. OVERALL METHODOLOGICAL ISSUES TO CONSIDER

The survey instruments need to be completed in full. It is imperative that the actual fieldwork (especially in relation to the clients/ customers/ users survey) be undertaken to cover seasonality (Winter and Summer vacations as well as Easter and September vacation periods could be generally regarded as peak seasons and periods in between be regarded as off-peak). Note that for specific events/ activities (for example, whale watching) specific seasonal periods need to be considered.

The sampling approach for survey implementation for both demand and supply-side stakeholders must also ensure that due consideration is given to spatial/ geographical spread across different locations. This is particularly important for the completion of the clients/ customers/ users. For the supply-side stakeholders, if possible, local, national and provincial databases of the supply-side stakeholders (for example, contact details for accommodation establishments and tour operators) should be accessed so that online and email surveys can be an option for survey completion. This research experience indicates that face-to-face interviews do not have a high response rate among supply-side stakeholders. However, follow-up emails and telephonic reminders need to be used to increase the response rate even when online and telephonic interviews are used.

Generally, to ensure robust data collection, training of fieldworkers and specific instructions in the case of online surveys must stress the importance of ensuring high response rates for specific questions, especially in relation to the economic data. Low response rates will undermine the economic modelling exercises. Furthermore, attention needs to be paid to the following aspects:

1. The currency in which the information is provided - it is advised that fieldworkers and field supervisors must ensure that all information is provided in Rands and therefore calculations need to be done in the field. Currency exchange rates can be sources from the internet on the day when the interview is conducted.
2. Ensure that annual amounts (for income and expenditure amounts) are not confused with monthly amounts.
3. Distinguish in terms of capturing responses between 'don't know/ can't recall' and no spend/ zero. This is critically important in calculating averages and overall economic modelling.



SAMPLING

Every stakeholder group will have its own sampling framework and strategy, that is, how to select respondents. For the CMT study, a proportionate sampling distribution by province was used as shown in the Table below.

Table 1: Survey sampling distribution by province

Surveys	KZN		WC		EC		NC		Total	
	T	C	T	C	T	C	T	C	T	C
Customer/ tourist/ user	1 200	1220	1 100	1110	600	701	100	-	3 000	3 031
Accommodation	50	58	50	45	20	22	5	-	125	125
CMT business owners	50	41	50	39	15	14	5	-	120	94
Retail outlets and establishments (+ 5 customer surveys per site)	50	54	50	50	20	21	5	-	125	125
Tour operators	25	30	25	23	15	13	5	-	70	66

T – Target

C – Number completed

Challenges were encountered in meeting some of the targets, for example, completing surveys in Northern Cape and meeting the target numbers for CMT business owners and tour operators. It is imperative that when challenges are encountered they are addressed. For example, In this study, more surveys were completed in the other coastal provinces.

For the client/ customer/ user surveys, these were conducted at purposively selected locations. Face-to-face interviews were undertaken. Fieldworkers were allocated specific locations during specific days. They were trained to systematically select persons, that is, on completion of a survey choose the next 20th person that passes by. Thus, they were trained to eliminate bias in the selection of respondents. This is a widely accepted sampling approach in tourism studies, especially at open venues when the target population is unknown and changes all the time. A screening question included in the survey was to first establish whether the person approached is at the location to participate in or has participated in CMT activities. If the response was in the negative, the person was not be interviewed.

For the other stakeholder interviews, face-to-face interviews were also conducted at purposively selected accommodation, CMT businesses as well as restaurant and retail establishments where the client/ customer/ user surveys were being conducted. Additionally, tour operators frequenting these



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locations were approached to participate in the study. At each of the restaurant and retail establishments, at least 5 patrons/ customers were interviewed as well. If databases of stakeholders are available (such as lists of accommodation establishments and tour operators), these could be used to use random, systematic or census sampling approaches that will ensure that the results have a higher level of reliability and validity. Specifically, in terms of the census approach, all businesses on the list could be invited to participate. They should be given the option to complete a survey (online or email completed survey) or make arrangements for a face-to-face or telephonic interview to be conducted. Please note that this type of approach requires reminders and follow-ups since there is often a low response rate. Random sampling entails selecting the target sample size from a list using a random table. Systematic sampling entails choosing every n^{th} person/ organisation/ business on a list.

Survey data was inputted into Excel as per the economists' specifications to ensure that the economic modelling can be conducted. Frequency tables were also generated for descriptive statistical analysis. Additionally, the results can be subjected to inferential statistical analyses.

The next section provides a step-by-step guide for the completion of each of the surveys.

3. COMPLETING SURVEY INSTRUMENTS

A step-by-step guide is provided to assist fieldworkers (face-to-face and telephonic) or persons who may deal with queries if online surveys are used to ensure that various sections of the survey is adequately completed and that each question is well understood. The guides are useful for data inputters as well to check data quality. The step-by-step guides for each survey presented in this Training Manual need to be used in conjunction with the respective surveys in Appendixes 1 to 5.

Please remember a blank question means that it has not been asked. Therefore, it is important that fieldworkers are trained to provide a response. Don't know, cannot recall or confidential are all important responses that are critical for robust data analysis and substantially improved data quality and reliability.

The grey shaded areas on the survey is meant to remind the fieldworker that additional information is required, that is, 'specify' information sought.



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3.1 CLIENTS/ CUSTOMERS/ USERS SURVEY GUIDE

DATE AND PLACE OF INTERVIEW

- This information needs to be filled in by the fieldworker prior to the completion of the questionnaire
- Please note that for specific events/ activities, clearly state name of event and year as well as the duration of the event/ activity (THESE NEED TO BE ADDED TO THE SURVEY IN APPENDIX 1)
- Please note that each survey will be allocated a questionnaire number – this will be inserted by the data capturers since each survey must have a unique identification number, specifically for data validation and checking which is critical to improve data quality. For example, if there are no responses or intuitively incorrect information (for example, 1 year for the age of the respondents), then the unique questionnaire number will be the reference to check against the actual information collected. Data inputting errors also occur which can be easily corrected.
- Date – insert the date when the interview is conducted.
- Location – insert the location where the interview is being conducted. Decide on how specific you would like the information to be. For example, V&A Waterfront or Cape Town.
- Cover the introduction and assurance of how confidentiality will be protected which is detailed later in the Training Manual.
- For online surveys include the following instruction (which need to be covered during fieldworker training):
 - Cross (X) appropriate box or boxes (for multiple response questions) for ALL closed-ended questions.



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SCREENING QUESTION

For CMT (as well as open events/ activities generally), it is important to ensure that persons participating in the interview are visiting a specific location linked to participate in CMT activities. Thus, there is a screening question which establishes whether persons being approached to participate in the survey participated in or would be participating in CMT activity/ activities on the specific day and location. If the response is in the negative, the survey should be discontinued. Fieldworkers should be asked to keep a record on the number of such persons approached. Stress that the fieldworker should than the person approached and explain why the interview is being discontinued if need be. If the response is positive, the fieldworker can continue with the survey.

A. PROFILE OF RESPONDENTS

A.1 Overnight visitors are tourists while day-trippers are those who travel from areas outside the local city/ suburb to visit the location where the interview is being conducted and return on the same day to their place of residence. Local residents are persons who live in the city/ suburb as their permanent place of resident. One response only.

A.1.1 This question is only for those who are not local residents. If respondent is visiting from outside South Africa, then specify the name of the country (NOT city/ suburb, region, etc.) where the respondent resides. Please note that this does not necessarily indicate the nationality of the respondent, for example, one can be South African but be living in Germany. If from South Africa, indicate name of province. One response only.

A.2 This question is to establish the best description of the immediate group visiting the location. Note the importance of stressing that the immediate group refers to the respondent and persons who are spending money together as well as those who are participating in CMT activities with the respondent. One (1) is the response if the respondent is alone. If the immediate group size if more than 5, the specific group size needs to be recorded. Train fieldworkers to probe if persons are spending money together if a large number is given, for example, more than 10. Often respondents are in larger tour or church groups and have to be reminded that we are only focusing on the immediate group size of persons spending money together (often as a family or close group of friends when one person is



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taking care of the bills). One response only.

A.3 This question requires the respondent to specify which type/s of CMT activity/ activities the respondent participated in or would participate in during his/ her visit to the beach location. Can be over multiple days for tourists but needs to focus on the one visit when the interview was being conducted. This questions also asks which other type/s of CMT activity/ activities the respondent would be interested in participating in. This will assist in understanding current and future CMT interest. Please note the examples and explanations of the specific types of activities listed. If the response/s are not accommodated in the list provided, the response needs to be written under 'other' and details provided. The field supervisors and data inputters need to be trained to check that the other activities identified do not correspond to those already listed. Multiple responses permitted since a respondent can participate in more than one CMT activity during his/ her visit.

A.4 Cross (X) all the non-CMT activities (multiple responses permitted) that the respondent participated in or intends participating in. Specify other activities not listed. Please note that the activities are besides those that are CMT-related.

A.5 If previously participated in different type/s of CMT activity/ activities during the last year in South Africa, specify number.

A.6 This question provides an indication of CMT satisfaction and intent to participate in different type/s of CMT activity/ activities in South Africa in the future. The reason/s for non-participation in the future should be recorded since it screens whether this is because of dissatisfaction with the CMT activity/ activities or other aspects.

A.6 This question also provides an indication of CMT satisfaction and records whether the respondent would advise friends, relatives or colleagues to participate in CMT activity/ activities in South Africa. One response only.



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B. CONSUMER BEHAVIOUR

This is the most important (and difficult/complex) section for the economic impact assessment. It is imperative that the questions in this section are fully completed and each question has a response,

B.1 This is for spend by the individual and his/ her immediate group in specific categories in relation to participating in CMT activities during the visit at the coastal/ marine location where the interview is being conducted. All respondents should be asked information for each category (except locals for accommodation). Please note "0" if no money spent on the stated category and "X" if respondent cannot recall or guess in the column provided. In all other categories indicate the amount in the first column. Therefore all categories must have a response. Amount to be in Rands (no cents – round off to the nearest Rand). If the respondent is a foreigner and you cannot do the exchange, state the amount and clearly indicate which currency is being used. The calculations can be completed with assistance from the field supervisor. To ensure better recall, spend is divided into 'did' and 'will' to cover actual and projected spend patterns since interviews are often conducted during the time of the visit and not after the visit. Data inputters need to add the 'did' and 'will' response for an overall total per category.

It is imperative that the overall total estimate is recorded since this is the most important figure to obtain. Please note that the overall total will not necessarily be the sum of the figures already provided since it is possible that a respondent may know the overall amount spent but may not know the exact amounts for the different categories.

B.2 Only 1 response is permitted for this question as we are looking for the main/ primary reason why the respondent is visiting the CMT location where the interview is being conducted. Please specify primary reason if other.

B.3 This question is only for overnight visitors. Establish and insert the number of nights the respondent did/ would be spending during his/ her visit to the coastal town/ city where interview is being conducted) in paid accommodation (excludes visiting friends and relatives). We are interested in the town/ city and not in specific suburbs within a city/ town.

B3.1 This question is only for overnight visitors. Establish and insert the number of nights the



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respondent did/ would be spending during his/ her visit in South Africa excluding the number of nights in the CMT location where the interview is being conducted.

Please note that it is possible that more than one accommodation type could be used in the CMT location and South Africa. We are interested in the total for all types of accommodation in the CMT location and the rest of South Africa, for example, a respondent may stay a few days in a hotel and additional days in a bed and breakfast establishment. Please clarify if need be that each night can only be in one category. Fieldworkers can double check if the sum of the days the people have given is the total length of their trip - quick calculation of all days and asking them "Am I right that your whole trip is 12 days", for example.

B.4 This question establishes the mode/s of transport used to visit the CMT location on the day when the interview is conducted. Please note that this is only for the day when the interview is being conducted and not the entire duration of the visit to the CMT location. Multiple responses per

B.5 Cross (X) only 1 response in the rating scale indicated for each of the statements about the coastal/ marine location (not town/ city as a whole). You will notice that each statement expresses an opinion position and therefore we are establishing the level of agreement with this statement. The statements are structured to be self-explanatory.

C. DEMOGRAPHIC PROFILE

C.1 Cross (X) only 1 response in relation to the category of the age of the respondent or insert number of years in space provided at last birthday. Please indicate clearly if the interviewee did not want to respond and regarded this as confidential. Also, if more than 70 years old the age needs to be specified. You will also notice that the age category starts at 18 years. Only adults should participate in the study since it is not ethically acceptable to interview someone younger than 18 years old without written permission from a parent or legal guardian.

C.2 Cross (X) only 1 response, that is, the highest level of education completed. Note that foreign respondents and some older South Africans may not be familiar with primary and secondary



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completed; hence we included <7 years and >7 years of schooling. If the interviewer is still unclear of the category, note response so that it can be categorized later. Also specify 'other' response.

C.3 Monthly net income refers to income taken home after tax deductions. Cross (X) only 1 response in relation to the category provided or insert income amount in Rands. For this question responses in other currencies are permitted. Again, please specify currency applicable if not in Rands so that the Rand value can be calculated. It is possible that respondents will deem this information to be confidential, indicate this. Please specify if income is more than R50 000.

C.4 The gender (male or female) and historical racial classification of the respondent should be noted rather than asked. Also, the historical racial classification only applies to South Africans.

3.2 CMT BUSINESS OWNERS

DATE AND PLACE OF INTERVIEW

- This information needs to be filled in by the fieldworker prior to the completion of the questionnaire
- Please note that each survey will be allocated a questionnaire number – this will be inserted by the data capturers since each survey must have a unique identification number, specifically for data validation and checking which is critical to improve data quality.
- Date – insert the date when the interview is conducted.
- Location – insert the location where the interview is being conducted.
- Cover the introduction and assurance of how confidentiality will be protected which is detailed later in the Training Manual.
- Stress that if the business has other branches/ enterprises in other parts of the country or internationally, 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.
- For online surveys include the following instruction (which need to be covered during fieldworker training):



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- Cross (X) appropriate box or boxes (for multiple response questions) for ALL closed-ended questions.

A. PROFILE OF BUSINESS

A.1 Indicate the type of organisation/ business. Specify 'other'. One response only.

A.2 This question is to establish the year in which the business started its operations. Data inputters should calculate the number of years the business has been in operation to calculate average number of years. One response only.

A.3 This question requires the respondent to specify how many businesses/ companies/ branches are there in different locations in addition to where the interview is being conducted. Please clarify this is in relation to how many is owned by the organisation or owner, not all the franchises that there are in South Africa. A high figure should alert the fieldworker or the person checking online survey responses to clarify this. Also, reiterate that if other businesses/ companies exist, 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.

A.4 This question is to establish the year in which the business became involved in CMT activities. This year should not be before the company started its overall operations. There is therefore a clear distinction between the number of years that an organisation/ business has been operational and number of years involved in CMT activities. This information is important to establish when an organisation/ business shifts focus. Data inputters should calculate the number of years the business has been involved in CMT activities to calculate average number of years. One response only.

A.5 Cross (X) the business/company's Broad-based Black Economic Empowerment (BBBEE) status. Indicate don't know or not applicable (NA). One response only.

A.6 This question requires the respondent to specify which type/s of CMT activity/ activities the business/ company is involved in. Please note the examples and explanations of the specific types of activities listed. If the response/s are not accommodated in the list provided, the response needs to be written under 'other' and details provided. The field supervisors and data inputters need to be



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trained to check that the other activities identified do not correspond to those already listed. Multiple responses permitted since a business/ company can be involved in more than one CMT activity.

B. EXPENDITURE AND INCOME

This is the most important (and difficult/complex) section for the economic impact assessment. It is imperative that the questions in this section are fully completed and each question has a response,

B.1 Specify the business/company's overall average income (in Rands) for the previous year as an actual amount or select one of the categories provided. Please note that responses in the categories below R200 000 and more than R2 500 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, R500 001 – R1 000 000 will be inputted as R750 000. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

B.2 Specify the business/company's overall average expenditure (in Rands) for the previous year as an actual amount or select one of the categories provided as per B.1.

B.2.1 Specify the average annual expenditure amount for the business/ company for the previous year in each category (capital expenditure, salaries and wages, advertising and marketing, and other costs which need to be specified) in Rands. All other costs can include any expense outside the categories provided. An actual amount can be provided or one of the categories provided can be selected. Please note how amounts need to be inputted if categories are selected. State 0 or none and don't know if applicable for each of the categories.

It is imperative that the overall total estimate is recorded since this is the most important figure to obtain. Please note that the overall total will not necessarily be the sum of the figures already provided since it is possible that a respondent may know the overall amount spent but may not know the exact amounts for the different categories.

B.3 Indicate the average annual income for the previous year for the business/ company derived from



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CMT activities only as an actual amount or select one of the categories provided as per B.1.

C. SUPPLIERS/ SERVICE PROVIDERS

C.1 Indicate the number of service providers the company/ business used in the previous year. If over 5, please specify. Indicate don't know/ can't recall or none if no service providers were used.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were locally-based, that is, from the city/ are where the business is located. If over 5, please specify. Indicate don't know/ can't recall or none if no locally-based service providers were used. The number should not exceed the amount indicated in C.1.

C.1.2 Indicate the number of service providers the company/ business used in the previous year who were black-owned, that is, from historically disadvantaged population groups. If over 5, please specify. Indicate don't know/ can't recall or none if no black-owned service providers were used. The number should not exceed the amount indicated in C.1.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were female. If over 5, please specify. Indicate don't know/ can't recall or none if no locally-based service providers were used. The number should not exceed the amount indicated in C.1.

C.2 Specify the business/company's overall average amount (in Rands) paid to service providers for the previous year as an actual amount or select one of the categories provided. Please note that responses in the categories below R100 000 and more than R1 000 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, R100 000 – R250 000 will be inputted as R175 000. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.



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D. EMPLOYMENT

This is an important section to establish employment trends and patterns.

D.1 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year. Please note that volunteers (who are defined as individuals who voluntarily assist for a small stipend, in-kind benefit such as a free lunch or without any financial or non-financial remuneration) are not included. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories.

D.2 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to gender (number of males and females). Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

D.3 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to historical racial population groups. The information is divided into South Africans (African, Coloured, White, Indian and Other) and Foreigners. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

D.4 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to location: local (city/ town/ municipality where business is located), regional (province where business is located), national (other provinces in South Africa) and international (outside South Africa). Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.



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3.3 ACCOMMODATION

DATE AND PLACE OF INTERVIEW

- This information needs to be filled in by the fieldworker prior to the completion of the questionnaire
- Please note that each survey will be allocated a questionnaire number – this will be inserted by the data capturers since each survey must have a unique identification number, specifically for data validation and checking which is critical to improve data quality.
- Date – insert the date when the interview is conducted.
- Location – insert the location where the interview is being conducted.
- Cover the introduction and assurance of how confidentiality will be protected which is detailed later in the Training Manual.
- Stress that if the business has other branches/ enterprises in other parts of the country or internationally, 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.
- For online surveys include the following instruction (which need to be covered during fieldworker training):
 - Cross (X) appropriate box or boxes (for multiple response questions) for ALL closed-ended questions.

A. PROFILE OF BUSINESS

A.1 Indicate the type of accommodation where the interview is being conducted. Multiple responses are permitted since one establishment may have, for example, hotel rooms and self-catering units. Specify 'other'.

A.2 This question is to establish the year in which the business started its operations. Data inputters should calculate the number of years the business has been in operation to calculate average number of years. One response only.



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B. EXPENDITURE AND INCOME

This is the most important (and difficult/complex) section for the economic impact assessment. It is imperative that the questions in this section are fully completed and each question has a response,

B.1 indicate the number of rooms in the establishment where the interview is being conducted. If more than one type of accommodation establishment in the same premises as per A.1 above, indicate the numbers of rooms for each type of establishment as well as the number of persons that can be accommodated per room on average for each type.

B.2 Indicate the months that are the accommodation establishments high and low seasons. Also indicate if establishment is closed (C) for a specific month. A month should only have one response.

B.3 Indicate the average room occupancy rates (in percentage) of the establishment where the interview is being conducted for the last year during the low/ off peak and high/ peak seasons. If more than one type of accommodation establishment in the same premises as per A.1 above, indicate the occupancy rates for each type of establishment.

B.3.1 Indicate the establishment's low and high seasons' room rates in Rands, including VAT, for each type of accommodation establishment in the same premises as per A.1 above.

B.4 Indicate the average number of nights guest stay during the low and high seasons for the establishment where the interview is being conducted. If more than one type of accommodation establishment in the same premises as per A.1 above, indicate the average number of nights guest stay during the low and high seasons for each type of establishment.

B.5 Specify the accommodation establishment's total income/ revenue generated (in Rands) for the previous year as an actual amount or select one of the categories provided. Please note that responses in the categories below R100 000 and more than R1 000 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, R100 000 – R250 000 will be inputted as R175 000. This will permit averages



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to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

B.6 Specify the average annual expenditure amount for the accommodation establishment for the previous year in each category (capital expenditure salaries and wages, advertising and marketing, travelling and other costs which need to be specified) in Rands. All other costs can include any expense outside the categories provided. An actual amount can be provided or one of the categories provided can be selected. Please note how amounts need to be inputted if categories are selected. State 0 or none and don't know if applicable for each of the categories.

It is imperative that the overall total estimate is recorded since this is the most important figure to obtain. Please note that the overall total will not necessarily be the sum of the figures already provided since it is possible that a respondent may know the overall amount spent but may not know the exact amounts for the different categories.

C. SUPPLIERS/ SERVICE PROVIDERS

C.1 Indicate the number of service providers the company/ business used in the previous year. If over 5, please specify. Indicate don't know/ can't recall or none if no service providers were used.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were locally-based, that is, from the city/ are where the business is located. If over 5, please specify. Indicate don't know/ can't recall or none if no locally-based service providers were used. The number should not exceed the amount indicated in C.1.

C.1.2 Indicate the number of service providers the company/ business used in the previous year who were black-owned, that is, from historically disadvantaged population groups. If over 5, please specify. Indicate don't know/ can't recall or none if no black-owned service providers were used. The number should not exceed the amount indicated in C.1.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were female. If over 5, please specify. Indicate don't know/ can't recall or none if no locally-based



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service providers were used. The number should not exceed the amount indicated in C.1.

C.2 Specify the business/company's overall average amount (in Rands) paid to service providers for the previous year as an actual amount or select one of the categories provided. Please note that responses in the categories below R100 000 and more than R1 000 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, R100 000 – R250 000 will be inputted as R175 000. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

D. EMPLOYMENT

This is an important section to establish employment trends and patterns.

D.1 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year. Please note that volunteers (who are defined as individuals who voluntarily assist for a small stipend, in-kind benefit such as a free lunch or without any financial or non-financial remuneration) are not included. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories.

D.2 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to gender (number of males and females). Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

D.3 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to historical racial population groups. The information is divided into South Africans (African, Coloured, White, Indian and Other) and Foreigners. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.



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D.4 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to location: local (city/ town/ municipality where business is located), regional (province where business is located), national (other provinces in South Africa) and international (outside South Africa). Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

3.4 TOUR OPERATORS

DATE AND PLACE OF INTERVIEW

- This information needs to be filled in by the fieldworker prior to the completion of the questionnaire
- Please note that each survey will be allocated a questionnaire number – this will be inserted by the data capturers since each survey must have a unique identification number, specifically for data validation and checking which is critical to improve data quality.
- Date – insert the date when the interview is conducted.
- Location – insert the location where the interview is being conducted.
- Cover the introduction and assurance of how confidentiality will be protected which is detailed later in the Training Manual.
- Stress that if the business has other branches/ enterprises in other parts of the country or internationally, 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.
- For online surveys include the following instruction (which need to be covered during fieldworker training):
 - Cross (X) appropriate box or boxes (for multiple response questions) for ALL closed-ended questions.



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A. PROFILE OF BUSINESS

A.1 This question is to establish the number of years the business has been operation in the location where the interview is being conducted. One response only.

A.2 Indicate the type of tour operator services provided by the business. Multiple responses are permitted since the tour operator may offer multiple services. Specify 'other'.

A.3 This question establishes the best product description of the tours/ transport services provided by the company, distinguishing primarily whether coastal and marine related activities or not coastal and marine activities or both. Specify 'other'. One response only.

B. RATES, EXPENDITURE AND INCOME

This is the most important (and difficult/complex) section for the economic impact assessment. It is imperative that the questions in this section are fully completed and each question has a response,

B.1 Indicate the months that are the tour operator regards as high and low seasons. Also indicate if establishment is closed (C) for a specific month. A month should only have one response.

B.2 Indicate the average number of clients/ customers for the tour operator for the last year during the low/ off peak and high/ peak seasons for CMT groups/ activities only as an actual amount or select one of the categories provided. Please note that responses in the categories below 500 and more than 4 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, 500 – 1 000 will be inputted as 750. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

B.3 Indicate the average spend per customer (in Rands), including VAT, for the last year during the low/ off peak and high/ peak seasons for CMT groups/ activities only as an actual amount or select one of the categories provided. Please note that responses in the categories below R100 000 and more than R1 000 000 require the amounts to be specified. Data inputters must note that actual amounts



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need to be inputted for the middle figure for each of the categories, for example, R100 000 – R250 000 will be inputted as R175 000. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

B.4 Specify the company's total income/ revenue generated (in Rands) for the previous year and for CMT groups/ activities only as an actual amount or select one of the categories provided as per B3.

B.5 Specify the company's total profit generated (in Rands) for the previous year and for CMT groups/ activities only as an actual amount or select one of the categories provided as per B3.

B.6 Specify the average annual expenditure amount for the tour company for the previous year in each category (capital expenditure salaries and wages, advertising and marketing, travelling and other costs which need to be specified) in Rands. All other costs can include any expense outside the categories provided. An actual amount can be provided or one of the categories provided can be selected. Please note how amounts need to be inputted if categories are selected. State 0 or none and don't know if applicable for each of the categories.

It is imperative that the overall total estimate is recorded since this is the most important figure to obtain. Please note that the overall total will not necessarily be the sum of the figures already provided since it is possible that a respondent may know the overall amount spent but may not know the exact amounts for the different categories.

B.7 This question establishes whether the tour operator being interviewed perceives an increase, decrease or no change in the demand for CMT products/ experiences in the last 5 years. Indicate 'don't know' if applicable. One response only.

C. SUPPLIERS/ SERVICE PROVIDERS

C.1 Indicate the number of service providers the company/ business used in the previous year. If over 5, please specify. Indicate don't know/ can't recall or none if no service providers were used.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were locally-based, that is, from the city/ are where the business is located. If over 5, please specify.



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Indicate don't know/ can't recall or none if no locally-based service providers were used. The number should not exceed the amount indicated in C.1.

C.1.2 Indicate the number of service providers the company/ business used in the previous year who were black-owned, that is, from historically disadvantaged population groups. If over 5, please specify. Indicate don't know/ can't recall or none if no black-owned service providers were used. The number should not exceed the amount indicated in C.1.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were female. If over 5, please specify. Indicate don't know/ can't recall or none if no locally-based service providers were used. The number should not exceed the amount indicated in C.1.

C.2 Specify the business/company's overall average amount (in Rands) paid to service providers for the previous year as an actual amount or select one of the categories provided. Please note that responses in the categories below R100 000 and more than R1 000 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, R100 000 – R250 000 will be inputted as R175 000. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

D. EMPLOYMENT

This is an important section to establish employment trends and patterns.

D.1 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year. Please note that volunteers (who are defined as individuals who voluntarily assist for a small stipend, in-kind benefit such as a free lunch or without any financial or non-financial remuneration) are not included. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories.

D.2 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to gender (number of males and females). Please



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indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

D.3 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to historical racial population groups. The information is divided into South Africans (African, Coloured, White, Indian and Other) and Foreigners. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

D.4 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to location: local (city/ town/ municipality where business is located), regional (province where business is located), national (other provinces in South Africa) and international (outside South Africa). Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

3.5 RESTAURANT AND RETAIL OUTLETS

RESTAURANT AND RETAIL SURVEY (APPENDIX 5A)

DATE AND PLACE OF INTERVIEW

- This information needs to be filled in by the fieldworker prior to the completion of the questionnaire
- Please note that each survey will be allocated a questionnaire number – this will be inserted by the data capturers since each survey must have a unique identification number, specifically for data validation and checking which is critical to improve data quality.
- Date – insert the date when the interview is conducted.



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- Location – insert the location where the interview is being conducted.
- Cover the introduction and assurance of how confidentiality will be protected which is detailed later in the Training Manual.
- Stress that if the business has other branches/ enterprises in other parts of the country or internationally, 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.
- For online surveys include the following instruction (which need to be covered during fieldworker training):
 - Cross (X) appropriate box or boxes (for multiple response questions) for ALL closed-ended questions.

A. PROFILE OF BUSINESS

A.1 This question is to establish the number of years the business has been operation in the location where the interview is being conducted. One response only.

A.2 This question requires the respondent to specify how many businesses/ companies/ branches are there in different locations in addition to where the interview is being conducted. Please clarify this is in relation to how many is owned by the organisation or owner, not all the franchises that there are in South Africa. A high figure should alert the fieldworker or the person checking online survey responses to clarify this. Also, reiterate that if other businesses/ companies exist, 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.

A.3 Indicate the type of services provided by the restaurant or retail establishment. Multiple responses are permitted since the business/ company may offer multiple services. Specify 'other'.



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B. RATES, EXPENDITURE AND INCOME

This is the most important (and difficult/complex) section for the economic impact assessment. It is imperative that the questions in this section are fully completed and each question has a response,

B.1 Indicate the months that the restaurant or retail establishment regards as high and low seasons. Also indicate if establishment is closed (C) for a specific month. A month should only have one response.

B.2 Indicate the average number of clients/ customers for the restaurant or retail establishment for the last year during the low/ off peak and high/ peak seasons as an actual amount or select one of the categories provided. Please note that responses in the categories below 500 and more than 4 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, 500 – 1 000 will be inputted as 750. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

B.3 Indicate the average spend per customer (in Rands), including VAT, for the last year during the low/ off peak and high/ peak seasons as an actual amount or select one of the categories provided. Please note that responses in the categories below R100 000 and more than R1 000 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, R100 000 – R250 000 will be inputted as R175 000. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

B.4 Specify the restaurant or retail establishment's total income/ revenue generated (in Rands) for the previous year as an actual amount or select one of the categories provided as per B3.

B.5 Specify the restaurant or retail establishment's total profit generated (in Rands) for the previous year as an actual amount or select one of the categories provided as per B3.

B.6 Specify the average annual expenditure amount for the business/ company for the previous year in each category (capital expenditure salaries and wages, advertising and marketing, travelling and



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other costs which need to be specified) in Rands. All other costs can include any expense outside the categories provided. An actual amount can be provided or one of the categories provided can be selected. Please note how amounts need to be inputted if categories are selected. State 0 or none and don't know if applicable for each of the categories.

It is imperative that the overall total estimate is recorded since this is the most important figure to obtain. Please note that the overall total will not necessarily be the sum of the figures already provided since it is possible that a respondent may know the overall amount spent but may not know the exact amounts for the different categories.

B.7 This question establishes whether the restaurant or retail establishment being interviewed perceives an increase, decrease or no change in the number of customers in the last 5 years. Indicate 'don't know' if applicable. One response only.

C. SUPPLIERS/ SERVICE PROVIDERS

C.1 Indicate the number of service providers the company/ business used in the previous year. If over 5, please specify. Indicate don't know/ can't recall or none if no service providers were used.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were locally-based, that is, from the city/ are where the business is located. If over 5, please specify. Indicate don't know/ can't recall or none if no locally-based service providers were used. The number should not exceed the amount indicated in C.1.

C.1.2 Indicate the number of service providers the company/ business used in the previous year who were black-owned, that is, from historically disadvantaged population groups. If over 5, please specify. Indicate don't know/ can't recall or none if no black-owned service providers were used. The number should not exceed the amount indicated in C.1.

C.1.1 Indicate the number of service providers the company/ business used in the previous year who were female-owned. If over 5, please specify. Indicate don't know/ can't recall or none if no locally-based service providers were used. The number should not exceed the amount indicated in C.1.



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C.2 Specify the business/ company's overall average amount (in Rands) paid to service providers for the previous year as an actual amount or select one of the categories provided. Please note that responses in the categories below R100 000 and more than R1 000 000 require the amounts to be specified. Data inputters must note that actual amounts need to be inputted for the middle figure for each of the categories, for example, R100 000 – R250 000 will be inputted as R175 000. This will permit averages to be calculated and is important for the economic modelling. Please indicate don't know or cannot recall if this is the case.

D. EMPLOYMENT

This is an important section to establish employment trends and patterns.

D.1 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year. Please note that volunteers (who are defined as individuals who voluntarily assist for a small stipend, in-kind benefit such as a free lunch or without any financial or non-financial remuneration) are not included. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories.

D.2 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to gender (number of males and females). Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

D.3 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to historical racial population groups. The information is divided into South Africans (African, Coloured, White, Indian and Other) and foreign nationals. Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.



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D.4 Indicate the number of employees the business/ company employed on a permanent and temporary basis for the previous year in relation to location: local (city/ town/ municipality where business is located), regional (province where business is located), national (other provinces in South Africa) and international (outside South Africa). Please indicate none if no one is employed in the specific category or don't know/ cannot recall. Thus, there should be a response for all categories. The totals should also add up to D.1 if information was provided.

RESTAURANT AND RETAIL CUSTOMER SURVEY (APPENDIX 5B)

The customer survey accompanies the restaurant and retail surveys, and establishes whether CMT was the main reason for customers visiting the location where the establishment is located. For each restaurant or retail establishment surveyed, at least 5 customer surveys should be completed.

- This information needs to be filled in by the fieldworker prior to the completion of the questionnaire
- Please note that each survey will be allocated a questionnaire number – this will be inserted by the data capturers since each survey must have a unique identification number, specifically for data validation and checking which is critical to improve data quality.
- Date – insert the date when the interview is conducted.
- Location – insert the location where the interview is being conducted.
- Cover the introduction and assurance of how confidentiality will be protected which is detailed later in the Training Manual.
- Include a description of the restaurant or retail outlet/ establishment.

1 Indicate the primary reason for the restaurant or retail establishment customer visiting the location where the interview is being conducted. One response only. Specify other activities not listed.

2 This question requires the respondent to specify which type/s of CMT activity/ activities he/ she did or would participated in during his/ her visit to the beach location where the interview is being conducted. Please note the examples and explanations of the specific types of activities listed. If the response/s are not accommodated in the list provided, the response needs to be written under 'other'



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and details provided. The field supervisors and data inputters need to be trained to check that the other activities identified do not correspond to those already listed. Multiple responses permitted since a respondent can participate in more than one CMT activity during his/ her visit.

PLEASE NOTE:

- Fieldworkers need to conduct themselves professionally at all times.
- Write clearly and legibly.
- Use a pencil.
- If no response or unclear, indicate this. A blank question (no response) will be interpreted as a question not asked and therefore an incomplete questionnaire which will have a bearing on the quality of the research.

4. FIELDWORKER TRAINING

All data collectors must undergo a training session using this Training Manual since it is essential that the core economic data is collected consistently and accurately. The surveys are not simple and the training will ensure that data quality is maintained. The clarity of the survey questions (especially for online/ email surveys) and level of understanding of the questions among fieldworkers is extremely important because the quality of the research and the subsequent economic modelling depend on the accuracy of the information collected.

The main aspects to consider when undertaking an interview are:

- Interviewing eligible adults at designated locations or with specific organisations/ businesses
- Introducing the research to the potential respondent and covering ethical aspects discussed later
- Obtaining complete and accurate answers as required and recording it properly on the survey
- The questions in the survey need to be exactly as they appear in the questionnaire. The guidelines in the Training Manual presented earlier help on how to probe to get answers if need be. Probe and prompt only when needed. Note that **probing** refers to asking questions like “is that all?” or “anything else?” in trying to help the respondent to remember all the relevant information while **prompting** is mentioning the possible answers to the respondent.



Prompting can often influence the response and therefore undermine data quality. Some tips to assist when probing is:

- Pause and wait if the respondent is trying to remember difficult items (which can occur when numerical/ spend data is being collected)
- Ask the respondent to clarify his/ her answer if necessary (you may be misunderstanding the respondent), especially if responses are provided that may need to be clarified
- Check for consistency between answers a respondent gives. For example, the respondent is a local resident but is indicating spend on accommodation. Be polite in trying to solve inconsistencies and establishing the correct information
- The fieldworkers must handle the surveys carefully and take care of them when in their possession. Destruction, defacing and loss of surveys will have serious implications for the project
- Approach the respondent cheerfully and with proper greetings and protocols as outlined in the ethics section
- Surveys should be checked by the fieldworker, supervisor and data inputter

It is very important that all interviews follow the same procedures. In order to assure this uniformity, fieldworkers are required to follow all of the instructions contained in this Training Manual. The supervisor should be informed of any problems encountered in the field and, if in doubt, fieldworkers should ask supervisor/s what to do.

Research logistics can be time consuming and should be adequately addressed. Often prior arrangements need to be made to interview stakeholders or undertake research at specific CMT locations. Due consideration should also be given to select fieldworkers who have experience and can understand the requirements of collecting economic data. It is essential that fieldworkers are trained prior to the research being undertaken.

During the training, each survey and specific questions must be discussed in detail. Role playing during training assists to expose fieldworkers to different contexts and different scenarios that may arise. Role playing also assists to make the fieldworkers more familiar with the surveys which improves their confidence levels.



4.1 ETHICAL CONSIDERATIONS

Every respondent needs to understand their rights and feel free to exercise them during the data collection process. Supervisors and fieldworkers need to be familiar with research ethical considerations which include:

- **Survey information is confidential and anonymity of respondents must be maintained:** A fieldworker should not under any circumstances divulge the identity of a respondent and specific information collected. In fact, a fieldworker should not interview someone he/ she knows. Furthermore, information not required (such as the name or contact details of the attendee) should not be asked or recorded under any circumstances.
- **Informed consent:** For research that is used for academic purposes, it is important that all respondents need to be informed about the scope and purpose of the study (including who the study is being conducted for), how the data will be used, the approximate duration of the interview, as well as their rights which include declining to participate and discontinuing their participation at any time. The attendee must give permission to be interviewed.
- **Ethical considerations during the interview**
 - o Make a good first impression and be professional (this includes dressing appropriately)
 - o Ensure that each respondent understands the individual question being asked
 - o If face-to-face interviews are required, do not leave the survey with the respondent for self-completion
 - o Try to conduct the interview in a private environment
 - o NEVER raise your voice or appear frustrated - be very patient
 - o Do not express an opinion for any of the responses – be neutral throughout the interview
 - o Never suggest answers to the respondent
 - o Do not pressure any individual to answer a question they do not wish to – clearly indicate that they did not want to respond (No response or NR)



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- o Do not engage in self or product promotion, religious or political propaganda, etc.
- o Respect the time and schedules of attendees at the events
- o Thank each respondent for their time
- **Further questions:** If you have any concerns or questions while undertaking the fieldwork bring it to the attention of the research supervisor

5. CALCULATING ECONOMIC IMPACT

Calculating economic impact – a user-friendly, basic approach primarily for events (step-by-step guide) in a separate document

Input-Output model and TSA (to be included by economists)

6. CONCLUSION

The Training Manual provides step-by-step guide on how to collect demand and supply-side stakeholder survey to establish the economic impacts of CMT in South Africa. It can be adapted to ascertain locality, city-specific and regional/ provincial impacts as well. Furthermore, it can be used to conduct research on specific events/ activities.



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Appendixes

APPENDIX 1: CLIENTS/ CUSTOMERS/ USERS/ TOURISTS

Date of interview: _____

Place of interview: _____

We are conducting a survey to assist us to better understand the economic impacts of Coastal and Marine Tourism in South Africa. This is a National Department of Tourism (NDT) funded project that is being undertaken by the University of KwaZulu-Natal. Please note that all answers will be kept confidential and presented anonymously to the NDT and in academic publications.

Thank you for your participation!

SCREENING QUESTION

1. Have you participated or will you participate in any coastal and marine tourism activity at this location today?

Yes	No
-----	----

IF NO, KEEP A RECORD OF THE NUMBER OF THESE PERSONS ENCOUNTERED DURING THE FIELDWORK PERIOD AND DO NOT CONTINUE WITH THE INTERVIEW. IF YES, CONTINUE WITH THE SURVEY.

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)
------------------------------------	------------------------------	---

1.1. If you are a tourist (overnight out of town visitor) or day visitor, where are you from?

Outside South Africa	Country:								
South Africa	Eastern Cape	Free State	Gauteng	KwaZulu-Natal	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape

2. How many persons are accompanying you who you are paying for or spending money together as a group (that is, your immediate group size) who are also participating in the coastal and marine tourism activity?

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



3. What types of coastal and marine tourism activities have or will you be participating in during this visit to this beach location (including activities participated in today)? 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)			
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)			

4. What are/were the main activities you intend participating in/have participated in during your visit to this location other than coastal and marine activities? (Mark all that apply)

Shopping	Business	Adventure	Medical/health	Nightlife	Sport	Visited a casino
Business	Social (VFR)	Food and wine	Theme Parks	Cultural/heritage	Conference	Shows performances
Visiting natural attractions/ wildlife that were not coastal/ marine			Other (specify)			

5. How many times previously have you participated in this/ these type/s of coastal and marine tourism activity/ activities in South Africa in the last year?

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

6. Would you participate in this/ these types of coastal and marine tourism activity/ activities again in South Africa?

Yes	No (provide a reason)
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7. Would you advise friends, relatives or colleagues to participate in this/ these type/s of coastal and marine tourism activity/ activities in South Africa?

Yes, definitely	Possibly	No, definitely not
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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 during this visit at this coastal/ marine location? (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	
Payment for 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 within coastal/ marine location			
Transportation during visit, including airfares and travel within South Africa only (for tourists only)			
Accommodation at coastal/ marine locations only (for tourists only)			
Accommodation outside coastal/ marine locations (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 in this beach/ coastal location	Holiday	Business	Visiting friends and relatives (VFR)	Shopping	Other (specify)
--	---------	----------	--------------------------------------	----------	-----------------

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

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

3.1. If you are an overnight visitor, how many nights will you be spending during this visit outside this town/ city but within South Africa?

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

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

Private	Rental	Metered taxi	Minibus	Bus	Walked	Other (specify)
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vehicle	vehicle	(eg. Uber)	taxi			
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5. Please indicate the level of agreement with the following statements about this coastal/ marine location (not town/ city as a whole) (select one option for each variable).

KEY: 1 - strongly disagree 2 - disagree 3 - neutral 4 - agree 5 - strongly agree

STATEMENT	1	2	3	4	5
Well maintained location					
Parking is adequate					
Sufficient facilities and amenities (e.g. toilets)					
Good refreshment areas/ food variety					
This is a green location that encourages responsible environmental practices (e.g. recycling)					
Signage to location was clear					
Safe location					
Entertainment opportunities available in the location					
Location is too crowded					

C. 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)
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2. Highest level of education completed.

No formal education	Primary completed (7 years of schooling)	Partial secondary completed (8-11 years of schooling)	Matric/ secondary completed	Certificate/ diploma
Undergraduate degree	Postgraduate degree	Other (specify)		

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

None	R 1 – R 8000	R 8001 – R 10 000	R 10 001 – R 20 000	R 20 001 – R 30 000	R 30 001 – R 40 000	R 40 001 – R 50 000	>R 50 000 (specify)	Confidential
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4. INTERVIEWER TO NOTE

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

THANK YOU FOR YOUR PARTICIPATION! For queries contact:



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Prof Urmilla Bob (UKZN)
bobu@ukzn.ac.za or 031 260 2501

APPENDIX 2: COASTAL AND MARINE TOURISM BUSINESS OWNERS

Date of interview: _____

Place of interview: _____

We are conducting a survey to assist us to better understand the economic impacts of Coastal and Marine Tourism in South Africa. This is a National Department of Tourism (NDT) funded project that is being undertaken by the University of KwaZulu-Natal. Please note that all answers will be kept confidential and presented anonymously to the NDT and in academic publications.

Thank you for your participation!

IF BUSINESS HAS OTHER BRANCHES/ ENTERPRISES IN OTHER PARTS OF THE COUNTRY OR INTERNATIONALLY, 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.

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.

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

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

5. 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
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6. 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)	
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. What was this business/company's overall average income for the last year? Please indicate actual amount or amount within categories below. _____

1. < R200 000 (specify)	2. R200 000 – R500 000	3. R500 001 – R1 000 000	4. R1 000 001 – R1 500 000	5. R1 500 001 – R2 000 000	6. R2 000 001 – R2 500 000	8. > R2 500 000 (Specify)
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2. What was this business/company's overall average expenditure for the last year? Please indicate actual amount or amount within categories below. _____

1. < R200 000 (specify)	2. R200 000 – R500 000	3. R500 001 – R1 000 000	4. R1 000 001 – R1 500 000	5. R1 500 001 – R2 000 000	6. R2 000 001 – R2 500 000	8. > R2 500 000 (Specify)
-------------------------	------------------------	--------------------------	----------------------------	----------------------------	----------------------------	---------------------------

2.1. What was the average annual expenditure for the last year (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	



Other costs (specify)	
TOTAL EXPENDITURE	

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
----------------------------	---------------------------	---------------------------	---------------------------	-----------------------------	------------------------------

3. What was the average annual income for the last year for this business/company for coastal and marine tourism activities only? Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
----------------------------	---------------------------	---------------------------	---------------------------	-----------------------------	------------------------------

C. SUPPLIERS

1. How many service providers did this company/business use in the last year?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.1. How many of the service providers were locally-based, that is, in the city/ area that your business is located in?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.2. How many of the service providers were black-owned?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.3. How many of the service providers were female?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

2. What was this business/company's overall average amount paid to the service providers for the last year? Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
----------------------------	---------------------------	---------------------------	---------------------------	-----------------------------	------------------------------

D. EMPLOYMENT

1. How many people did this business/company employ for the last 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. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees
Permanent	
Temporary/Casual	

2. How many employees were male or female? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees	
	Male	Female



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Permanent		
Temporary/Casual		

3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of additional employees for the event					
	South Africans					Foreign Nationals
	African	Coloured	White	Indian	Other	Foreign Nationals
Permanent						
Temporary/Casual						

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 indicate none if no one is employed in the specific category or don't know/ cannot recall.

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 (outside South Africa)
Permanent				
Temporary/Casual				

THANK YOU FOR YOUR PARTICIPATION! For queries contact:

Prof Urmilla Bob (UKZN)

bobu@ukzn.ac.za or 031 260 2501



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APPENDIX 3: COASTAL TOURISM AND HOSPITALITY BUSINESSES: ACCOMMODATION

Date of interview: _____

Place of interview: _____

We are conducting a survey to assist us to better understand the economic impacts of Coastal and Marine Tourism in South Africa. This is a National Department of Tourism (NDT) funded project that is being undertaken by the University of KwaZulu-Natal. Please note that all answers will be kept confidential and presented anonymously to the NDT and in academic publications.

Thank you for your participation!

IF BUSINESS HAS OTHER BRANCHES/ ESTABLISHMENTS IN OTHER PARTS OF THE COUNTRY OR INTERNATIONALLY, 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.

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 (excluding private rentals)	
Private rentals (e.g. Air B&B)	
Resorts	
Lodges	
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

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	Number of persons that can be accommodated per room on average
Type 1			
Type 2			
Type 3			



2. 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	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
L												
H												

3. Please estimate the average room occupancy rate of this establishment for the last year during the low/ off-peak season and during the high/ peak season.

	a. Specify type linked to Question A1	b. Average room occupancy during low season	c. Average room occupancy during high season
Type 1 (%)			
Type 2 (%)			
Type 3 (%)			

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

	a. Specify type linked to Question A1	b. Low season room rates	c. Low season room rates
Type 1			
Type 2			
Type 3			

4. Please indicate the average number of nights guests stay during the low and high season for each type of accommodation in this facility.

	a. Specify type linked to Question A1	b. Average number of nights during low season	c. Average number of nights during high season
Type 1			
Type 2			
Type 3			

5. What is the total income/revenue generated by this accommodation establishment during the last year? Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	6. > R1 000 000 (Specify)
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6. What was the average expenditure (in Rands) for this accommodation establishment in the categories below for the last year? Please indicate 0, if not applicable. Please indicate actual amount or amount within categories below.

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

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	6. > R1 000 000 (Specify)
-------------------------	------------------------	------------------------	------------------------	--------------------------	---------------------------

C. SUPPLIERS



1. How many service providers did this company/business use in the last year?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.1. How many of the service providers were locally-based, that is, in the city/ area that your business is located in?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.2. How many of the service providers were black-owned?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.3. How many of the service providers were female?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

2. What was this business/company's overall average amount paid to the service providers for the last year? Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
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D. EMPLOYMENT

PLEASE NOTE THAT INFORMATION IS ONLY FOR THE SPECIFIC ESTABLISHMENT WHERE THE SURVEY IS BEING COMPLETED.

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. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees
Permanent	
Temporary/Casual	

2. How many employees were male or female? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees	
	Male	Female
Permanent		
Temporary/Casual		

3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of additional employees for the event					
	South Africans					Foreign Nationals
	African	Coloured	White	Indian	Other	Foreign Nationals
Permanent						
Temporary/Casual						



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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 indicate none if no one is employed in the specific category or don't know/ cannot recall.

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 (outside South Africa)
Permanent				
Temporary/Casual				

THANK YOU FOR YOUR PARTICIPATION! For queries contact:

Prof Urmilla Bob (UKZN)

bobu@ukzn.ac.za or 031 260 2501



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APPENDIX 4: COASTAL TOURISM AND HOSPITALITY BUSINESSES: TOUR OPERATORS

Date of interview: _____

Place of interview: _____

We are conducting a survey to assist us to better understand the economic impacts of Coastal and Marine Tourism in South Africa. This is a National Department of Tourism (NDT) funded project that is being undertaken by the University of KwaZulu-Natal. Please note that all answers will be kept confidential and presented anonymously to the NDT and in academic publications.

Thank you for your participation!

Description of type of tour operator: _____

IF BUSINESS OPERATES IN OTHER PARTS OF THE COUNTRY OR INTERNATIONALLY, 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.

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? Tick all that apply

Transport services	
Guided tours	
Other (specify)	

3. The tours/transport services provided by the company is best described by the following product descriptions. Tick only one

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, EXPENDITURE AND INCOME

1. Please indicate which months are regarded as your low (L) season and which are regarded as your high (H) season in relation to coastal and marine tourism groups/ activities? If closed for the month, insert a C.

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



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2. Please estimate the average number of clients/customers for the last year during the low/ off-peak season and during the high/ peak season for coastal and marine tourism groups/ activities only.

Average number of clients/customers during low season	Average number of clients/customers during high season

1. > 500 (Specify)	2. 500 - 1 000	3. 1 001 - 1 500	4. 1 501 - 2 000	5. 2 001 - 2 500	6. 2 501 - 3 000	6. 3 001 - 3 500	6. 3 501 - 4 000	6. > 4 000 (specify)
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3. Please indicate the average spend per customer (for coastal and marine tourism groups/ activities only) in Rands during the low season and during the high season, including VAT?

Average spend during low season	Average spend during high season

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

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
-------------------------	------------------------	------------------------	------------------------	--------------------------	---------------------------

5. Please estimate the total profit generated by the business for the last year for coastal and marine tourism groups/ activities only. Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
-------------------------	------------------------	------------------------	------------------------	--------------------------	---------------------------

6. What is the average annual expenditure (in Rands) for this business/company in the categories below? Please indicate 0, if not applicable. Please indicate actual amount or amount within categories below.

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

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
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7. Has there been a change in the demand for coastal and marine tourism products/experiences in the last 5 years?

Increase	Decrease	No change	Don't know
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C. SUPPLIERS

1. How many service providers did this company/business use in the last year?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
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1.1. How many of the service providers were locally-based, that is, in the city/ area that your business is located in?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.2. How many of the service providers were black-owned?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

1.3. How many of the service providers were female?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

2. What was this business/company's overall average amount paid to the service providers for the last year? Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
----------------------------	---------------------------	---------------------------	---------------------------	-----------------------------	------------------------------

D. 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. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees
Permanent	
Temporary/Casual	

2. How many employees were male or female? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees	
	Male	Female
Permanent		
Temporary/Casual		

3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of additional employees for the event	
	South Africans	Foreign Nationals



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	African	Coloured	White	Indian	Other	Foreign Nationals
Permanent						
Temporary/Casual						

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 indicate none if no one is employed in the specific category or don't know/ cannot recall.

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 (outside South Africa)
Permanent				
Temporary/Casual				

THANK YOU FOR YOUR PARTICIPATION! For queries contact:

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APPENDIX 5A: COASTAL TOURISM AND HOSPITALITY BUSINESSES: RESTAURANT AND RETAIL OUTLETS

Date of interview: _____

Place of interview: _____

We are conducting a survey to assist us to better understand the economic impacts of Coastal and Marine Tourism in South Africa. This is a National Department of Tourism (NDT) funded project that is being undertaken by the University of KwaZulu-Natal. Please note that all answers will be kept confidential and presented anonymously to the NDT and in academic publications.

Thank you for your participation!

Description type of outlet/ establishment: _____

IF BUSINESS HAS OTHER BRANCHES/ OUTLETS IN OTHER PARTS OF THE COUNTRY OR INTERNATIONALLY, 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.

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? _____

3. What type of services do you provide? Tick all that apply

Restaurant (food and beverages)	
Clothing apparel	
Arts and crafts	
Other (specify)	

B. RATES, EXPENDITURE AND INCOME

1. 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	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
L												
H												

2. Please estimate the average number of clients/customers for the last year during the low/ off-peak season and during the high/ peak season.

Average number of clients/customers during low	Average number of clients/customers during high
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season	season

1. > 500 (Specify)	2. 500 - 1 000	3. 1 001 - 1 500	4. 1 501 - 2 000	5. 2 001 - 2 500	6. 2 501 - 3 000	6. 3 001 - 3 500	6. 3 501 - 4 000	6. > 4 000 (specify)
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3. Please indicate the average spend per customer in Rands during the low season and during the high season, including VAT?

Average spend during low season	Average spend during high season

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

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
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5. Please estimate the total profit generated by this business for the last year? Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
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6. What is the average annual expenditure (in Rands) for this business/company in the categories below? Please indicate 0, if not applicable. Please indicate actual amount or amount within categories below.

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

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
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7. 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 did this company/business use in the last year?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
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1.1. How many of the service providers were locally-based, that is, in the city/ area that your business is located in?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
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1.2. How many of the service providers were black-owned?



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Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
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1.3. How many of the service providers were female?

Don't know/ can't recall	None	1	2	3	4	5	>5 (specify)
--------------------------	------	---	---	---	---	---	--------------

2. What was this business/company's overall average amount paid to the service providers for the last year? Please indicate actual amount or amount within categories below.

1. < R100 000 (Specify)	2. R100 000 – R250 000	3. R250 001 – R500 000	4. R500 001 – R750 000	5. R750 001 – R1 000 000	8. > R1 000 000 (Specify)
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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. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees
Permanent	
Temporary/Casual	

2. How many employees were male and female? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of employees	
	Male	Female
Permanent		
Temporary/Casual		

3. How many employees were from different historical racial groups? Please make sure totals add up to the totals in Table 1 above. Please indicate none if no one is employed in the specific category or don't know/ cannot recall.

Duration	Number of additional employees for the event					
	South Africans					Foreign Nationals
	African	Coloured	White	Indian	Other	Foreign Nationals
Permanent						
Temporary/Casual						

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 indicate none if no one is employed in the specific category or don't know/ cannot recall.

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 (outside South Africa)
Permanent				
Temporary/Casual				



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APPENDIX 5B: COASTAL TOURISM AND HOSPITALITY BUSINESSES: RESTAURANT AND RETAIL CUSTOMER SURVEY

Date of interview: _____

Place of interview: _____

We are conducting a survey to assist us to better understand the economic impacts of Coastal and Marine Tourism in South Africa. This is a National Department of Tourism (NDT) funded project that is being undertaken by the University of KwaZulu-Natal. Please note that all answers will be kept confidential and presented anonymously to the NDT and in academic publications.

Thank you for your participation!

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. water, big wave and kite surfing, stand up paddle boarding, yachting, water skiing)	
Ocean experience (e.g. cruise tourism, marinas, island tourism, shipwreck diving)	
Events (e.g. marine festivals and competitions such as yacht races or regattas, fishing competitions)	
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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