

South Africa: Tourism Statistics and the Tourism Satellite Account at a Sub-National Level

Contributed paper

Riaan Grobler¹
Kevin Geddes²

Summary: For South Africa the first draft of the experimental Tourism Satellite Account (TSA) will be disseminated only on a national level in 2009.

This document will examine the current tourism data gaps on a provincial (regional) level. In the South African context sub-national level refer to the country's 9 provinces.

There is expressed interest in South Africa for TSAs at the sub-national level. However, a TSA or any other tourism indicators can not be successful on a national or sub-national level without reliable data of good quality. There are important factors which differentiate national and sub-national data and its availability. Prior to an attempt to compile a sub-national TSA, the statistics collected at a sub-national level must first be audited.

This paper examines the strengths and weaknesses of the current tourism statistics available within South Africa for application at the sub-national level, and ultimately will conclude whether or not sub-national TSAs for South Africa can be attempted in the long term.

Index: South Africa, Sub-National TSA, Provincial Tourism Statistics, Tourism Statistics, Availability of Provincial Tourism Statistics

1 Statistics South Africa – National Accounts – Chief Economist, South Africa

2 Statistics South Africa – National Accounts – Economist, South Africa

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ABBREVIATIONS

AFS	Annual Financial Statistics
BoP	Balance of Payments
BoPT	Balance of Payments for Tourism
CSIR	Council for Scientific and Industrial Research
DHA	Department of Home Affairs
DTS	Domestic Tourism Survey
GDP	Gross Domestic Product
GHS	General Household Survey
GDP	Gross Domestic Product
IO-tables	Input Output tables
LFS	Labour Force Survey
LSS	Large Sample Survey
MCS	Movement Control System
PGTA	Provincial Government Tourism Authority
PTA	Provincial Tourism Authority
QLFS	Quarterly Labour Force Survey
SARB	South African Reserve Bank
SAT	South African Tourism
SIC	Standard Industrial Classification of all Economic Activities
1993 SNA	1993 System of National Accounts
Stats SA	Statistics South Africa
SU-tables	Supply and Use tables
TSA	Tourism Satellite Account
UNWTO	United Nations World Tourism Organisation
VAT	Value Added Tax

INTRODUCTION

In South Africa the first experimental Tourism Satellite Account (TSA) for the reference year 2005 will be published at the end of March 2009 (at a national level). This paper will examine the current available sub-national tourism statistics as well as the requirements for Statistics South Africa (Stats SA) to publish the TSA on a sub-national level. The paper will also propose steps toward publishing a TSA at a sub-national level. In the South African context the sub-national level refers to the 9 provincial administrative areas. A sub-national TSA can provide substantial detail on a provincial level regarding the effects of tourism on the sub-national/provincial economy.

The United Nations World Tourism Organisation (UNWTO) currently does not have a specific conceptual framework for a sub-national or regional TSA. There have been a growing number of requests regarding the scope and contents of a sub-national TSA³. A sub-national TSA offers a more detailed perspective on tourism's influence on the economy per region than a national TSA can offer. Due to the nature of tourism, it is not uniform throughout a country but rather unevenly distributed. A sub-national TSA is the next step in the development of the TSA, and it can examine the distribution of tourism within a country. South Africa's position to begin to compile and subsequently publish a sub-national TSA must therefore be examined.

CURRENT TOURISM STATISTICS AT A SUB-NATIONAL LEVEL FOR SOUTH AFRICA

Tourism covers a wide range of statistics which are important for the monitoring and development of the tourism industry. There are various tourism data sets available nationally, however, national values do not necessarily explain the economic and non-economic indicators on a sub-national level. There has been an increasing demand for sub-national tourism statistics within South Africa (by Provincial Tourism Authorities (PTA's) and Provincial Governmental Tourism Administrations (PGTA's)) and the demand for this data has increased because it provides a localised view of the tourism industry of a given area. Sub-national tourism statistics also provide information to provincial stakeholders in more detail when compared to the national tourism statistics. A sub-national TSA would complement the sub-national tourism statistics and would explain the sub-national tourism economy in more detail than what is currently available in South Africa.

Audit of selected tourism data currently available within Statistics South Africa

An internal audit was performed on various surveys conducted by Statistics South Africa (Stats SA) in order to assess whether or not there was any sub-national tourism data currently available within the various surveys, either unpublished or not. The result of the audit highlighted very limited current sub-national/provincial data for tourism.

General household survey

The General Household Survey (GHS) is an annual household survey conducted by Stats SA. Its purpose is to measure different aspects of living conditions of South African households. This survey covers several areas (it does include a tourism module aimed at supplying domestic tourism data for the compilation of the national TSA).

³ UNWTO – Adapting the National TSA project to sub-national levels

Table 1: Tourism data variables contained within the General Household Survey tourism module

Data variable	Available on sub-national level	Concerns with data
Nights spent in South Africa	Yes	Quality of data available at a provincial level (sampled nationally and not representative on a provincial level)
Purpose of trip by number of nights	No	-
Consumption of expenditure items	Partially	Quality of data available at a provincial level (sampled nationally and not representative on a provincial level)
Consumption of expenditure items included within a package deal.	No	-
Consumption of expenditure items not within a package deal	Yes	Quality of data available at a provincial level (sampled nationally and not representative on a provincial level)-

Source: Stats SA

Large sample surveys

The Large Sample Surveys (LSS's) are periodic⁴ industry surveys that measures economic activity in various industry sectors. The LSS's that were examined are the:

- LSS for the transport industry;
- LSS for personal services;
- LSS for real estate and business services;
- LSS for accommodation; and
- LSS for Food and beverages.

Table 2 contains the LSS's examined and the possibility of extracting sub-national data:

Table 2: Sub-national tourism data within the Large Sample Surveys

LSS Survey	Available on a Sub-national Level	Concerns with the survey at a sub-national level
Transport Industry	Yes, however only through data manipulation	The sub-national dataset is created using the enterprises' addresses; therefore the sub-national data can not be truly representative.
Accommodation Industry	Yes, however only through data manipulation	The sub-national dataset is created using the enterprises' addresses; therefore the sub-national data can not be truly representative.
Personal Services Industry	Yes, however only through data manipulation	The sub-national dataset is created using the enterprises' addresses; therefore the sub-national data can not be truly representative.

⁴ Periodic surveys on a rotational basis of 3 years

Table 2: Sub-national tourism data within the Large Sample Surveys (concluded)

LSS Survey	Available on a Sub-national Level	Concerns with the survey at a sub-national level
Business Services Industry	Yes, however only through data manipulation	The sub-national dataset is created using the enterprises' addresses; therefore the sub-national data can not be truly representative.
Food and Beverages	Yes, however only through data manipulation	The sub-national dataset is created using the enterprises' addresses; therefore the sub-national data can not be truly representative.

Source: Stats SA

There were concerns that were raised by the survey areas regarding the particular method used to re-form the dataset into sub-national variables such as:

- The major problem when creating a sub-national dataset from the current LSS sample is the way in which it is currently drawn. A stratum is used, which is based on the Standard Industrial Classification of all Economic Activities (SIC) and size group, it is drawn on a national level and therefore will not focus on an even distribution within the provinces. The result of this is when the data is disaggregated and reformed into provincial data, the sample will no longer be representative of the provinces. Incorrect reporting would therefore occur, and the quality of the data obtained would be questionable.
- Another concern which was raised, which is particularly relevant to enterprises, is that when re-forming the data into a new sub-national dataset the variable used to determine the enterprise's location is the address of the enterprise. The problems with this are that:
 - Addresses may be outdated;
 - Enterprises might utilise postal addresses, which are outside their place of operation, especially where enterprises are close to provincial borders; and
 - Certain enterprises operate over multiple provincial borders thus determining the contribution to each province is not possible.

With the current sample and collection method, the LSS data is not collected at a sub-national level so any sub-national data has to be created through data manipulation. The variables used in order to perform this manipulation are themselves questionable. The feasibility of conducting the LSS's at a sub-national level will be discussed in 2010 when the surveys are repeated⁵.

Until the survey is conducted at a sub-national level the data will have to be manipulated to obtain the sub-national figures. This data manipulation raises certain problems regarding the data quality, primarily caused by an incorrect sample for the sub-national level. One possible interim solution is to use another dataset. The local PTAs could be approached to perform surveys in their respective districts, this bottom up approach could be used instead of the top down LSS data, unfortunately surveys are expensive and it wouldn't be regarded as official statistics.

⁵ Stats SA

Tourism and migration release

The Tourism and Migration release reports on the arrivals and departures of foreign and South African travellers. Travellers include⁶:

- Same-day visitors and tourists; and
- Other travellers such as migrant workers from other countries paid in South Africa.

The latter is not of importance with regards to tourism statistics. The scope of the release covers all data (from the Movement Control System (MCS) received from the Department of Home Affairs (DHA). The arrivals of foreign travellers are more detailed than departures as they are reported by the mode of travel, gender, age and purpose of visit. South African residents are reported by mode of travel only⁷. The Tourism and Migration release currently does not capture provincial migration data as its main focus is only on migration to and from foreign countries. It also does not capture which provinces are involved in the migration i.e. where people are arriving to and departing from provincially.

Survey of tourist accommodation

The survey of Tourist Accommodation is a monthly survey that was introduced by Stats SA starting from April 2004, and covers a sample of private and public enterprises involved in the short-stay accommodation industry⁸ in South Africa. The information is published quarterly.

This survey covers the following tax registered private and public enterprises that are mainly involved in the short-stay accommodation industry:

- 64101⁹ Hotels, motels and inns;
- 64102 Caravan parks and camping sites;
- 64103 Guest houses and guest farms; and
- 64109 Other accommodation.

It collects information on:

- type of establishment;
- relevant grading of establishment;
- number of stay units¹⁰ available on the last night of the month;
- number of stay units sold for the month;
- income from accommodation for the month;
- income from restaurant and bar sales for the month;
- other income for the month;
- total operating expenses excluding capital for the month;
- total number of employees at the end of the month; and
- total gross basic salaries and wages paid at the end of the month.

⁶ Stats SA - Tourism and Migration (P0351) May 2008

⁷ Stats SA – Tourism and Migration (P0351) May 2008

⁸ All surveys explained in this document are industry-based. Investigation work is underway to move away from industry-based surveys to activity-based surveys for the measurement of tourism activities.

⁹ Refers to SIC classification.

¹⁰ A stay unit describes the unit of accommodation that is available to be charged out to guests, for example, a powered site in a caravan park or a room in a hotel.

The results of this survey are used to compile estimates of the national TSA and the gross domestic product (GDP) and its components. However, employment data collected through this survey do not provide sufficient detail for the national TSA. The sample for this survey is not representative on a sub-national level.

Food and beverages survey

The Food and Beverages survey is also a relatively new monthly survey that was introduced by Stats SA starting from April 2004, and covers a sample of private and public enterprises involved mainly in the preparation of meals and drinks for immediate consumption in South Africa. The information is published quarterly.

This survey covers the following tax registered private and public enterprises that are mainly engaged in providing food and beverages for immediate consumption:

- 64201¹¹ Restaurants or tearooms with a liquor licence;
- 64202 Restaurants or tearooms without a liquor licence;
- 64203 Take-away counters;
- 64204 Caterers; and
- 64209 Other catering services.

It collects information on:

- Type of enterprise;
- Income from food sales;
- Income from bar sales;
- Other income;
- Total income; and
- Total number of employees at the end of the month.

One of the uses of the results of this survey is to compile estimates of the TSA and the GDP and its components. Employment data collected through this survey do not provide sufficient detail for the TSA. These statistics are also used in the analysis of comparative business and industry performance. The sample for this survey is not representative on a sub-national level.

Annual financial statistics

The Annual Financial Statistics (AFS) is an economic activity survey aimed at collecting financial statistics in respect of enterprises for the following industries¹²:

- Forestry and fishing;
- Mining and quarrying;
- Manufacturing;
- Electricity;
- Gas and water supply;
- Trade;
- Real estate; and
- Other business services.

¹¹ Refers to SIC classification.

¹² StatsSA – Annual Financial Statistics (P0021)

The AFS is a survey used to derive a measure of industry performance based on information available from the financial accounts of enterprises. These results are used to compile estimates of the annual GDP¹³. Currently the AFS does not collect any sub-national data for its publication. There is no provision in the survey providing a split between the provinces, and as a result disaggregation of the results into sub-national data is currently not possible.

Labour force survey

The Labour Force Survey (LFS) is a bi-annual household survey designed to measure the labour market. It provides insight into a variety of issues related to the labour market, including the level and pattern of unemployment, and the occupational structure of the economy¹⁴. The LFS has (as of 28 August 2008) been replaced by the Quarterly Labour Force Survey (QLFS). The QLFS will provide labour market data on a quarterly basis as opposed to bi-annually.

The LFS data is primarily used to populate Table 7 of the national TSA. Table 7 shows the number of people employed per tourism related industries. The LFS data can be formatted to a sub-national level. The provincial data can also include:

- Population groups; and
- Gender.

The LFS can provide employment data at a sub-national level for the various tourism related industries. The LFS can provide the physical number of people employed in a particular industry by province; unfortunately it is unable to provide how much of that employment is directly contributed to tourism and how much of the employment is not related to tourism. This will not affect tourism characteristic industries, such as hotels and restaurants, however tourism related industries that contribute to tourism but are not entirely dependant on it i.e. products used by tourism and non-related sectors will be affected. This is more pronounced on a sub-national level because within a country different industries are concentrated at varying levels in different provinces. There is also cross-provincial supply of tourism products, for example transport which may be purchased or rented in one province but used in another. This may be particularly prevalent when near provincial borders.

Supply and use tables

The Supply and Use tables (SU-tables) are a cornerstone of the 1993 System of National Accounts (1993 SNA). These tables have both a statistical and analytical function. The SU-tables provide a coordinating framework for checking both the accuracy and the consistency of the data contained in national accounts. One of the many other uses of the SU-tables is that these tables can be extended to satellite accounts (accounts linking the 1993 SNA with specific fields of enquiry). The intent of satellite accounts is to make apparent and to describe in more depth aspects that are hidden in the national accounts framework or surface only in a limited number of points, e.g. tourism. Tourism as such is not an industry and cannot be classified separately. However, specific tourism transactions appear separately only in a few cases. In order to measure and describe tourism in a national accounts framework, use must be made of satellite accounting

¹³ StatsSA – Annual Financial Statistics (P0021)

¹⁴ StatsSA – Labour Force Survey (P0210)

The supply table shows the source or the origin of the goods and services produced within the economy for a given year in a matrix format. The supply of goods and services is measured at basic prices, which is the preferred method of valuing output in the 1993 SNA. The basic price is the amount receivable by the producer from the purchaser for a unit of a good or service produced as output minus any tax payable plus any subsidy receivable on that unit as a consequence of its production or sale. Basic prices exclude any transport charges invoiced separately by the producer.

The use table displays the demand of various goods and services, which may be used as intermediate inputs (goods and services that are purchased by an industry from other industries or imported to produce its outputs) or for final consumption by households, government, etc. The 1993 SNA recommends that intermediate and final consumption expenditure be valued at purchasers' prices. The purchasers' price is the amount paid by the purchaser, excluding any deductible value added tax (VAT) or similar deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser. The purchasers' price of a good includes any transport charges paid separately by the purchasers' to take delivery at the required time and place.

The SU- tables for 2005 were used as the basis for the development of the first experimental TSA for South Africa. The SU-tables for 2005 were compiled for 95 industries and 27 goods and services. Stats SA does not however currently compile SU-tables on a regional or provincial level and there are no plans in the long term to start developing regional/provincial SU-tables¹⁵.

South African Tourism

South African Tourism (SAT) conducts two major surveys used in the compilation of the national TSA:

- The Departure Survey; and
- The Domestic Survey.

SAT is also responsible for the Annual Tourism Report and the Annual Domestic Tourism Report. These two reports include a number of statistics relevant to the compilation of a TSA.

The 2007 Annual Tourism Report contains some indicators relating to provincial distribution of tourism. The distribution is viewed from three perspectives¹⁶:

1. How many provinces are visited by foreign tourists;
2. The distribution of bed-nights; and
3. The distribution of value across the nine provinces of South Africa.

Unfortunately this data refers only to foreign tourists' expenditure and travel distribution. It does not include any domestic tourism distributions. The data is not at a sufficiently detailed level to be used in the compilation of a sub-national TSA. Although foreign tourist expenditure is useful (especially for a national TSA) at a sub-national level, both foreign and domestic tourism are both viewed as equally important at a sub-national level.

¹⁵ Due to limitations within current data sources used for the compilation of the SU-tables

¹⁶ SAT – 2007 Annual Tourism Report

South African Reserve Bank

The South African Reserve Bank (SARB) compiles and publishes the Balance of Payments (BoP) for South Africa on the national level only. The compilation of the Balance of Payments for Tourism (BoPT) has, however, not started yet. Work has already started in 2006 to harmonise the BoP with the required concepts for the national TSA.

Alternative sub-national tourism statistics

Due to the lack of official statistics providing sub-national tourism data, an option that was investigated was to use external data. Two particular external data sources investigated are the KwaZulu-Natal Domestic Tourism Market report and the Council for Scientific and Industrial Research (CSIR) Annual State of Logistics report. Both provide an insight on sub-national tourism and while they are not official statistics they could be used as a secondary data source in the compilation of the sub-national TSA.

KwaZulu-Natal domestic tourism market

The KwaZulu-Natal Tourism authority released a report featuring data on the KwaZulu-Natal Domestic Tourism market. The report entitled “Towards an effective Segmentation Approach for the KwaZulu-Natal Domestic Tourism Market” contained various models and focused on the measurement of the living standards of travellers travelling to the province. However there was certain data regarding inbound and outbound sub-national tourism¹⁷.

Some of the data contain within the report included:

- Source of South African Domestic Tourists (by province);
- Major metropolitan origins of South Africa’s long term holidaymakers;
- Nature of domestic trips split between inter-provincial and intra-provincial; and
- Nature of South Africa’s key domestic tourism segments.

CSIR annual state of logistics

The CSIR began a logistics survey in 2004. It has become a premier support for decision makers in the logistics industry¹⁸. The survey is the collaboration between the University of Stellenbosch and the CSIR.

The data obtained from this survey (some unpublished) does contain provincial transport data¹⁹. The data has yet to be explored within this audit however the University of Stellenbosch is willing to assist in determining what data from this survey will be usable for a sub-national TSA.

¹⁷ KwaZulu-Natal Tourism – Towards an effective Segmentation Approach for the KwaZulu-Natal Domestic Tourism Market

¹⁸ CSIR

¹⁹ University of Stellenbosch

THE TOURISM SATELLITE ACCOUNT AT THE SUB-NATIONAL LEVEL

The TSA is descriptive and provides the position of tourism in the country. It observes the interaction between the various components of the economy, including tourism and non-related tourism industries. The result is that the TSA provides a basis on which future decisions can be based like:

- The future development of tourism;
- The future growth of the industry; and
- The measurement of other industries in the economy.

The sub-national TSA offers a new scope into the economic analysis of regions or provinces within a country. It uses the same basic (with exceptions) conceptual framework as the national TSA. A consequence of this is that it is extremely difficult and expensive to compile. Many countries will not be able to publish one²⁰.

The sub-national Tourism Satellite Account and conceptual framework

The 1993 SNA does not define a specific framework for regional accounting and the statistical systems of South Africa are not updated for a sub-national purpose. Currently it is not possible to make a strict identification of tourism activities in the terms of the scheme used to design the 1993 SNA and TSA. The major reasons for this are²¹:

- Not all the tourism variables are additive or easily transportable from the national environment to a sub-national level, the same applies to other variables including the export and import of goods;
- Some activities can not be regionalized for example auxiliary activities of multiregional units and central government services relating to tourism. Others including interregional transport of passengers and tour operators pose an extremely difficult sub-national measurement task; and
- The enormous amount of statistical information required. There are administrative boundaries separating regions however there is free movement of people, goods, services and capital. Thus there are no instruments in place to measure this accurately.

Demand side data is also severely restricted. The two major reasons given for demand side restriction are²²:

- The requirement to adapt the conceptual framework of the TSA including the definitions of concepts like usual environment, residence, forms of tourism, trips and purpose of trip; and
- The extreme difficulty and cost in capturing this data.

At present there are no sub-national guidelines to the conceptual framework. The conceptual framework must be adapted to sub-national levels because the national definitions and concepts may not be applicable at a sub-national level, a good example being the usual environment. Therefore any resident travelling within this threshold would not be

²⁰ UNWTO – Adapting the National TSA project to sub-national levels

²¹ 2008 Tourism Satellite Account: Recommended Methodological Framework

²² 2008 Tourism Satellite Account: Recommended Methodological Framework

regarded as a tourist, however at a sub-national level it would be necessary to adapt the usual environment so that it would regard people travelling within their provincial district as domestic tourists. It is also important to understand the different forms of tourism and the purpose of trips at a sub-national level, as this differs in nature when compared to the national TSA.

In order to begin developing a sub-national conceptual framework, it is important to fill the information gaps. Tourism authorities would have to supply information regarding the whole region as well as any sub-regional data. Various different measures can be used and taken, however the UNWTO recommends performing supplementary surveys, using administrative data and applying modeling techniques²³. The type of additional data required varies considerably depending mainly on the tourism activities in particular areas. In areas where holiday homes predominate for example many coastal regions, second homes for own tourism use, the letting of homes by residents are two activities that do not necessarily receive prioritised attention at the national level however feature predominantly at a regional level. In cases such as these it is important to conduct a survey to attempt to measure this segment. Information obtained should include maintenance costs and rental paid²⁴.

RECOMMENDATIONS AND WAY FORWARD

There is currently no specific conceptual framework providing guidance on the collection of sub-national tourism statistics as well as the development of sub-national TSA's. National TSA' concepts and definitions can not be directly applied to the sub-national level. Due to differences between the national and sub-national TSAs; and because of the experimental nature of a sub-national TSA, it is important that the conceptual framework be very flexible in its design. They should share certain concepts, definitions and statistical information between them²⁵.

The sub-national TSA's should firstly be compiled as a highly experimental satellite account. This does not mean the accounts and subsequently the development of them should not take priority on the UNWTO agenda, it merely implies that there may be a lot of adjustment to current frameworks needed and it may take a longer time until the sub-national data sources are of a sufficient quality to develop sub-national TSA's. Another consideration of a sub-national TSA is that unlike the national TSA, there should be an increased focus on²⁶:

- Same day travel;
- The concepts of 'inbound', 'outbound' and 'domestic' tourism (to reflect both intra and inter-regional travel);
- The linkage between UNWTO guidelines and the BoP ('travel' and 'transportation' item);and
- Linkages between National and Sub-National Authorities.

One of the first steps in the development of a sub-national TSA would be the auditing of existing national tourism data (both surveys and administrative records from both national and regional sources). This first step would assist in determining the feasibility of attempting a sub-national TSA for a country and what actions plans needs to be put in place. It is already certain that the information available is not complete however ascertaining exactly what information is incomplete will help greatly in moving forward²⁷.

²³ UNWTO – Adapting the National TSA project to sub-national levels

²⁴ UNWTO – Adapting the National TSA project to sub-national levels

²⁵ UNWTO – Adapting the National TSA project to sub-national levels

²⁶ UNWTO – Adapting the National TSA project to sub-national levels

²⁷ UNWTO – Adapting the National TSA project to sub-national levels

Various PTA's in South Africa (such as Gauteng Tourism) have expressed interest in compiling their own TSA for internal use. This is still in the very early stages of development (and will be compiled by consultants) but the PTA's have shown interest in working together with Stats SA to share knowledge on the process followed. It must be noted that they are provincial tourism authorities and that they would focus on a bottom up approach, which differs when compared to the Stats SA's top down approach. The other concern when a PTA undertakes the compilation of a sub-national TSA is the extensive use of modeling and a resulting simulated sub-national TSA. While a simulated account can assist with data shortfalls, the result is a sub-national TSA that bears the label of the TSA but is of a significantly lower standard and contains 'guesstimates' rather than officially validated data (as compared to a national TSA).

The UNWTO Secretariat states that consultants using input-output tables (IO-tables) and general equilibrium or econometric models refer to these models as a TSA. These models are not a TSA and it is unlikely that they even use the same concepts and definitions. This abuse of the term 'TSA' has been seen at a national and sub-national level. This abuse of the concept is probable at sub-national levels especially with consultants claiming they can create a TSA. This is spurred on by the fact that little is known about the TSA by potential stakeholders.²⁸

An important difference between a simulated or modelled indicator and a satellite account such as the national or sub-national TSA is that a satellite account describes the economy from a National Accounts perspective. An economic model or simulated account uses a set of assumptions to describe tourism based on what data is available (and how that data is applied). It must be stressed that this is useful as a guideline for observing the contribution of tourism toward the economy, however when compared against a solid statistical observation the superficial observations of the economic model or simulated account fall well short of the standard²⁹.

At present in South Africa the availability of sub-national tourism data is very limited. A major limiting factor for a sub-national TSA in South Africa is the lack of sub-national SU-tables and the BoP 'travel' and 'transport' items. The SU-tables are of utmost importance in the compilation of the TSA (confrontation of supply and demand). Another concern is that the qualities of the existing limited sub-national data from the various provinces are also questionable.

With the LSS's Stats SA can start motivating for provincial data collection, or at very best a sample that can be stratified over the 9 provincial areas of South Africa. This should provide data that could assist in formulating a supply side data source. Unfortunately though even with provincial LSS data, as long as the SU-tables are only available nationally the compilation of a sub-national TSA problematic. There is a possibility of modelling the SU-tables data into 9 provincial areas, unfortunately the quality of a TSA using modelled data must be called into question.

The GHS supplies some domestic tourism demand side data on a provincial level. The upcoming Domestic Tourism Survey (DTS) will assist to provide sub-national domestic tourism data which would complement the GHS data (the results of this survey will be available in 2009).

The improvement of the statistical systems to where the provincial data required for a sub-national TSA is available will take time, especially considering that SU-tables are not going to be available sub-nationally for considerable time. It is recommended that in this

²⁸ UNWTO – Adapting the National TSA project to sub-national levels

²⁹ UNWTO – Adapting the National TSA project to sub-national levels

interim, Tourism indicators should be formed at a sub-national level. This will at least provide the PTAs, PGTAs and other interested parties in useful information that can be used for planning, policies and gauging the performance of the tourism economy within the 9 provinces. While tourism indicators certainly can not give the detail that a TSA could be able to supply, it is a beginning point.

If sub-national provincial indicators are to be developed, it must be important to establish comparability between the provinces, as well as which indicators must be developed. A way forward would be to develop the indicators based on certain tables of the TSA, capturing the most crucial figures to the provincial economies. Although different provinces will have different indicators they feel is important, there will be a few that would be regarded as important to all, namely:

- Employment;
- Number of trips;
- Number of beds;
- Numbers of overnight stays;
- Number of establishments;
- Number of visitors; and
- Tourism expenditure.

In conclusion the sub-national TSA for South Africa has many obstacles to overcome, however with the upcoming release of the first experimental national TSA focus should move toward compilation of experimental sub-national TSA's and to the development of interim tourism indicators. A systematic approach focussing on the compilation of a sub-national TSA for provinces with highly developed statistical systems, such as Gauteng and KwaZulu-Natal and then focus on the other provinces as the quality of data improves would be the best approach. It is also paramount that the various PGTAs and PTAs agree to uniform definitions and concepts, allowing a certain amount of comparability between the provinces.

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