

DRAFT NATIONAL TOURISM STATISTICS PLAN

2024-2030

broadening horizons



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



For consultation purposes only

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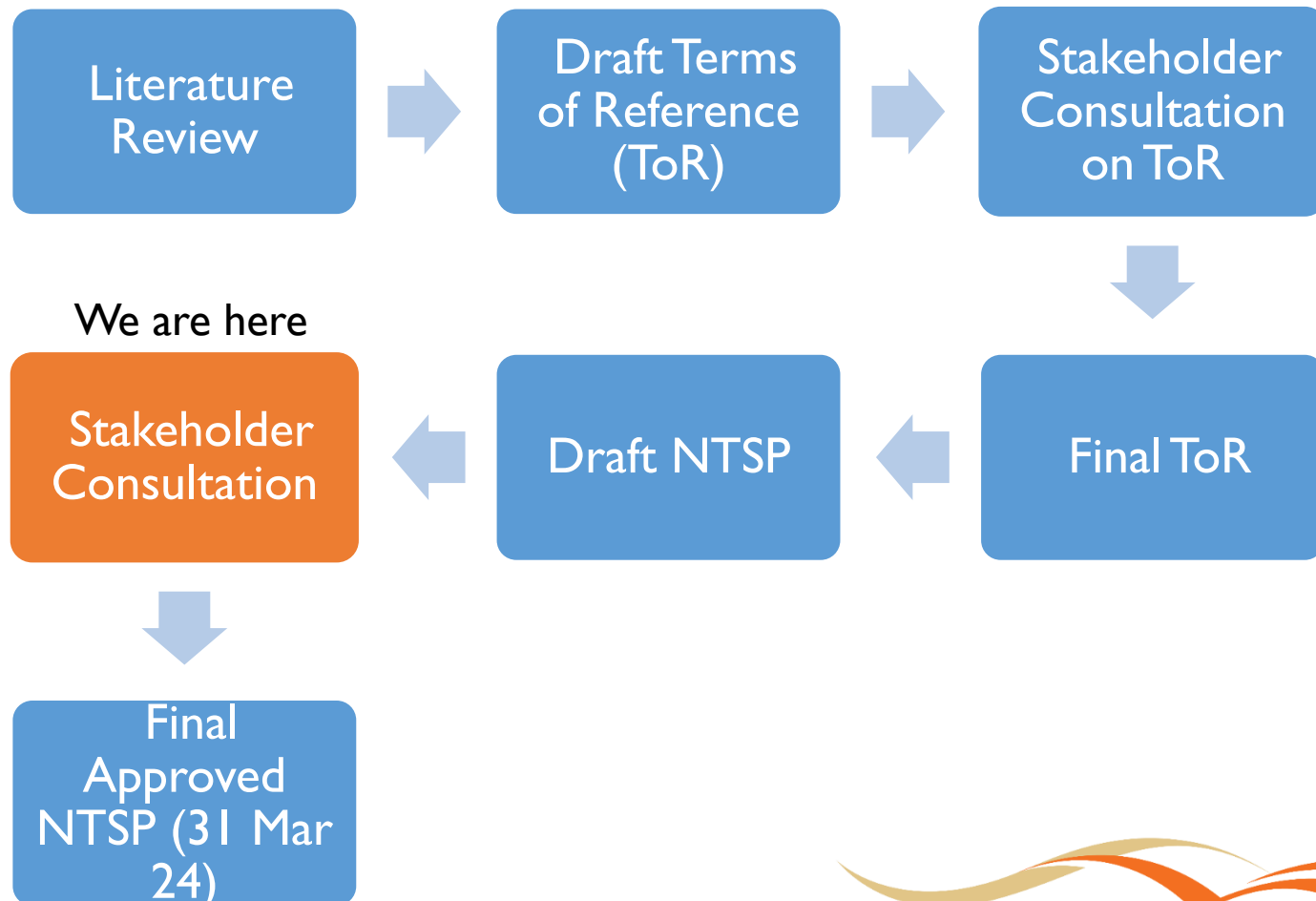


BACKGROUND & CONTEXT

- Tourism is a key contributor to economic growth and job creation but is under-resourced
- Accurate and reliable statistics are required by public and private sector at national, provincial and local level for planning and decision-making
- Inter-departmental Tourism Statistics Technical Committee; and Provincial Tourism Statistics Technical Committee; established to address various tourism statistics challenges
- National Tourism Analytics System Framework (NTASF) developed in 2021 to serve as a guideline to develop the National Tourism Analytics System (NTAS)
- The NTASF provides the key indicators, sub-indicators, data sources and the process of accessing available tourism statistics and information at global and national level
- A 2022/23 study undertaken by the Department of Tourism focused on challenges at provincial level - recommended the development of a National Tourism Statistics Plan (NTSP)



APPROACH TO DEVELOPING THE NTSP



KEY STAKEHOLDER CONSULTATION

➤ Inter-departmental Tourism Statistics Technical Committee:

- Department of Home Affairs
- Statistics South Africa
- Department of Tourism and South African Tourism
- Tourism Business Council of SA (TBCSA)

➤ Provincial Tourism Statistics Technical Committee:

- Provincial Departments and Tourism Marketing Authorities (DMOs)

➤ District and Local Municipalities - various

➤ Tourism Industry Associations – see below

➤ LTOs / CTOs

➤ Other

- SATSA
- SAACI
- FEDHASA
- ASATA
- ACSA
- Sustainable Tourism Partnership Programme
- CSIR
- PHASA



SWOT ANALYSIS

STRENGTHS

- South Africa is one of the most advanced countries in Africa in terms of its collection and production of tourism statistics.
- Strong national statistical authority in South Africa that adheres to international best practice and standard concepts and definitions.
- Regular reporting on international and domestic tourism statistics is provided with good historical data available to track trends.
- NTASF is in place to act as a guideline that will be used to develop the NTAS.
- Institutional structures focussed on tourism statistics are in place at national and provincial levels .

WEAKNESSES

- Fragmented approach to data collection, analysis, storing and dissemination of tourism statistics.
- Recognition of the importance of tourism and tourism statistics is not universal across all spheres of government and private sector, leading to inadequate resource allocation.
- Inadequate skills across various government spheres to produce, analyse and disseminate tourism statistics.
- Relevance and comprehensiveness of tourism statistics to data user needs is inconsistent.
- Data sharing/transparency within government and between government and private sector is low.
- Lack of understanding and adherence to standard concepts and definitions for tourism statistics, leading to inconsistent approaches to data collection and incorrect interpretation of tourism statistics.
- Standard approach to domestic tourism statistics is lacking, leading to poor data comparability and interpretation challenges.
- Low levels of agility to adjust methodologies, find new sources of data, use new technologies, and provide timely tourism statistics to stakeholders.



SWOT ANALYSIS

OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• Improved data collection methodologies. There is an opportunity to harmonise methodologies for collecting tourism data, ensuring consistency and comparability across different jurisdictions and organisations. Exploring new data collection methods, such as big data analysis and credit card spend data, can enhance the accuracy and timeliness of tourism statistics.• Enhanced partnerships. Strengthening partnerships with government and private sector stakeholders providing tourism statistics can improve the availability and quality of tourism statistics. Collaboration within government and between government and private sector can lead to more comprehensive and standardised tourism statistics.• Technology utilisation. Embracing technological advancements can enhance data collection, analysis, and reporting processes.• Statistical literacy and standardisation. Improving statistical literacy among stakeholders and standardising tourism definitions and methodologies across all levels of data collection can address challenges related to data interpretation and comparability.	<ul style="list-style-type: none">• Lack of prioritisation of tourism and tourism statistics, leading to continued inadequate resource allocation to tourism statistics.• Insufficient resource allocation to tourism statistics (human, financial and technology), leading to continuation and worsening of the weaknesses above.• Lack of stakeholder collaboration and partnerships, leading to continued fragmentation in availability of tourism statistics and inefficient resource use.• Failure to address user needs for tourism statistics, leading to continued issues with data accuracy and relevance.• Fragmented approach to implementation of the NTSP, leading to weaknesses with tourism statistics worsening.• Poor accountability for NTSP implementation activities, leading to fragmentation and inadequate resource allocation for tourism statistics.



PURPOSE AND OBJECTIVES OF THE NTSP

Main purpose: Provide strategic direction for the improvement of quality assured tourism statistics that will be used to inform decision-making across all government spheres (national, provincial and local) and private sector.

Key objectives for tourism statistics at national, provincial and local level:

- Indicate the state (needs and challenges) of tourism statistics at national, provincial and local level.
- Identify and prioritise short, medium and long-term programmes and projects for the improvement of tourism statistics across all levels (national, provincial and local). These should address the collection, production, storage and dissemination of tourism statistics, including the harmonisation of tourism statistics, application of standards and quality control mechanisms in line with national and international standards.
- Set out the key responsibilities for the collection, production, storage and dissemination of tourism statistics, and outline existing and new partnerships between users and producers of tourism statistics at national, provincial and local level (both within government and private sector spheres).
- Encourage participation and cooperation between role players in respect of tourism statistics.
- Contribute to the National System of Tourism Statistics produced by Stats SA.
- Identify the resources needed to improve the availability, collection and analysis of tourism statistics (financial, human and technology).



NTSP STRATEGIC DIRECTION

Vision

Rapidly and inclusively growing tourism economy informed by a fit-for-purpose tourism statistics ecosystem that is accurate, reliable and accessible to all.

Mission

To measure the performance, economic contribution and sustainability of tourism through a credible statistical system that is underpinned by stakeholder partnerships for planning and decision-making.

Guiding Principles

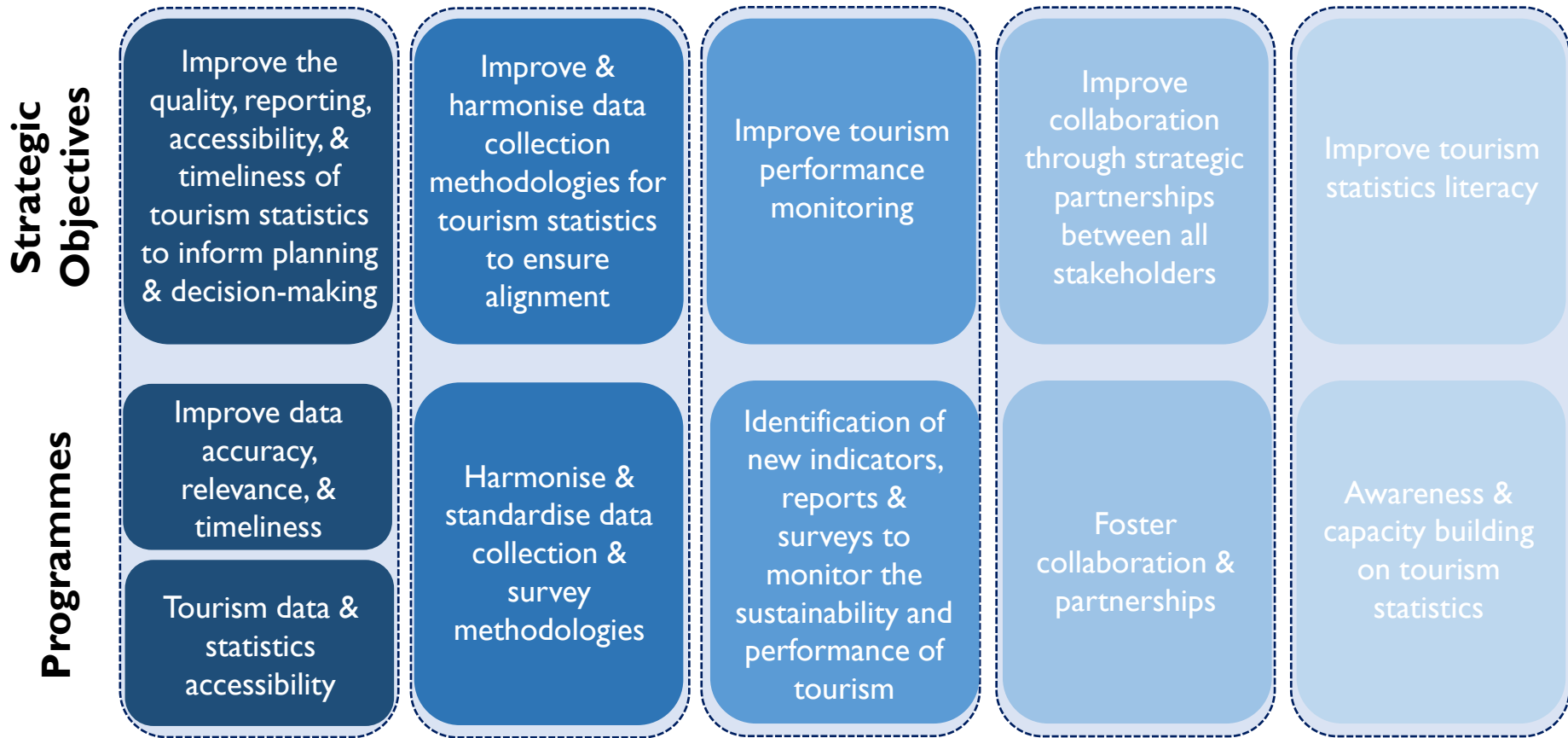
Quality tourism statistics -
Adherence to best practice, standards, concepts and methods for tourism statistics

Responsible and sustainable tourism -
Acknowledging the importance of responsible and sustainable tourism through its measurement and reporting

Stakeholder participation -
Ensuring cooperation and collaboration between stakeholders

Transparency of tourism statistics -
Ensuring accessibility for stakeholders

STRATEGIC OBJECTIVES & PROGRAMMES



Strategic Objective I: Improve the quality, reporting, accessibility, & timeliness of tourism statistics to inform planning & decision-making

Programme I: Improve data accuracy, relevance, & timeliness

Sub-programmes:

- Improve inbound and domestic tourism data through reviewing existing data sources & surveys, & creating partnerships for data provision
- Review indicators in the accommodation and food and beverages surveys & expand to sub-national level
- Publishing of tourism sub-sector employment data included in the labour force survey report
- Produce standardised tourism reports at national and sub-national levels
- Develop a framework to guide the process of reporting and communication of key tourism statistics
- Simplify the reporting structure of the Tourism Satellite Account (TSA)



Strategic Objective 1: Improve the quality, reporting, accessibility, & timeliness of tourism statistics to inform planning & decision-making

Programme 2: Tourism data & statistics accessibility

Sub-programmes:

- Develop guidelines for data sharing within government & between government & private sector
- Coordinate access to data licences for government stakeholders
- Development of the National Tourism Analytics System (Centralised Tourism Database with demand & supply statistics)



Strategic Objective 2: Improve and harmonise data collection methodologies for tourism statistics to ensure alignment

Programme 3: Harmonise & standardise data collection & survey methodologies

Sub-programmes:

- Standardise tourism concepts and definitions to ensure alignment with international standards
- Standardise methodologies for tourism surveys conducted to measure the performance of the tourism sector, e.g. rationalise the domestic tourism survey



Strategic Objective 3: Improve tourism performance monitoring

Programme 4: Identification of new indicators, reports and surveys to monitor the sustainability and performance of the tourism sector

Sub-programmes:

- Development of timely marketing intelligence reports
- Identify new indicators and reliable sources to monitor the sustainability and performance of the tourism sector at national and sub-national levels
- Identify real-time data to be used to monitor the performance of the tourism sector
- Establish a pre-arrival data collection system at different ports of entry
- Develop standard model to calculate/estimate the contribution of tourism to the economy in the absence of provincial TSA
- Collaborate with UN Tourism to develop provincial TSAs
- Develop standardised forecasting models for tourism key indicators



Strategic Objective 5: Improve collaboration through strategic partnerships between all stakeholders

Programme 5: Foster collaboration and partnerships

Sub-programmes:

- Develop guidelines for data collaboration, elevate the status of the national tourism stakeholder forum to improve the quality of participation and outcomes, and identify key stakeholders to collaborate with and form partnerships for tourism statistics



Strategic Objective 6: Improve tourism statistics literacy

Programme 6: Awareness and capacity building on tourism statistics

Sub-programmes:

- Conduct workshops to capacitate producers and users of tourism statistics
- Identify training/courses for upskilling producers and users of tourism statistics and new tools and software
- Develop a manual on key tourism statistics and sources, and concepts and definitions



THANK YOU

Any additional inputs to be provided in writing by Friday 23 February 2024 to JLL

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