



Travel & Tourism

ECONOMIC IMPACT 2013

SOUTH AFRICA

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The Economic Impact of Travel & Tourism 2013

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Foreword

The World Travel & Tourism Council (WTTC) has been investing in economic impact research for over 20 years. This research assesses the Travel & Tourism industry's contribution to GDP and jobs for 184 countries and 24 regions and economic groups in the world. Our ten-year forecasts are unique in the information they provide to assist governments and private companies plan policy and investment decisions for the future.

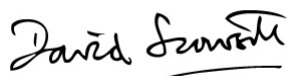
2012 demonstrated again the resilience of the Travel & Tourism industry in the face of continued economic turmoil, as economic growth slowed and was even negative in key global markets. The latest annual research from WTTC and our research partner Oxford Economics, shows that Travel & Tourism's contribution to GDP grew for the third consecutive year in 2012, and created more than 4 million new jobs. The strongest growth in 2012 was evident in international demand as appetite for travel beyond national borders, from leisure and business visitors, remains strong.

Travel & Tourism's importance to the wider economy continued to grow in 2012. Its total contribution comprised 9% of global GDP (US \$6.6 trillion) and generated over 260 million jobs – 1 in 11 of the world's total jobs. The industry outperformed the entire wider economy in 2012, growing faster than other notable industries such as manufacturing, financial services and retail.

With such resilience in demand and an ability to generate high employment, the importance of Travel & Tourism as a tool for economic development and job creation is clear. In total, the industry contributed to over 10% of all new jobs created in 2012. Less restrictive visa regimes and a reduction in punitive taxation levels would help the industry to contribute even more to broader economic development and better fulfil the clear demand for international travel.

While 2013 will present further challenges for the global economy and the Travel & Tourism industry, we remain optimistic that Travel & Tourism will continue to grow, outpace growth of the wider economy and remain a leading generator of jobs.

In the longer-term, demand from and within emerging markets will continue to rise in significance. Destinations need to be willing to invest in infrastructure suitable for new sources of demand to achieve the clear growth potential that exists. For example, we forecast that China will overtake the US by 2023 as the world's largest Travel & Tourism economy, measured in total GDP terms (2012 prices), and the size of the outbound market.



David Scowsill
President & CEO
World Travel & Tourism Council

South Africa

2013 ANNUAL RESEARCH: KEY FACTS

2013
forecast

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was ZAR102.0bn (3.2% of total GDP) in 2012, and is forecast to rise by 1.7% in 2013, and to rise by 4.5% pa, from 2013-2023, to ZAR161.4bn in 2023 (in constant 2012 prices).

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was ZAR315.4bn (9.8% of GDP) in 2012, and is forecast to rise by 1.9% in 2013, and to rise by 4.4% pa to ZAR492.7bn in 2023.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2012 Travel & Tourism directly supported 619,500 jobs (4.6% of total employment). This is expected to rise by 0.5% in 2013 and rise by 2.4% pa to 786,000 jobs (4.9% of total employment) in 2023.

EMPLOYMENT: TOTAL CONTRIBUTION

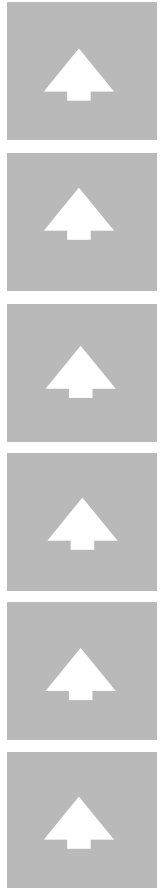
In 2012, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 10.3% of total employment (1,399,500 jobs). This is expected to rise by 1.1% in 2013 to 1,415,500 jobs and rise by 2.1% pa to 1,750,000 jobs in 2023 (10.9% of total).

VISITOR EXPORTS

Visitor exports generated ZAR93.7bn (10.1% of total exports) in 2012. This is forecast to grow by 2.3% in 2013, and grow by 4.6% pa, from 2013-2023, to ZAR150.3bn in 2023 (10.9% of total).

INVESTMENT

Travel & Tourism investment in 2012 was ZAR52.1bn, or 8.3% of total investment. It should rise by 2.0% in 2013, and rise by 3.5% pa over the next ten years to ZAR74.9bn in 2023 (7.6% of total).



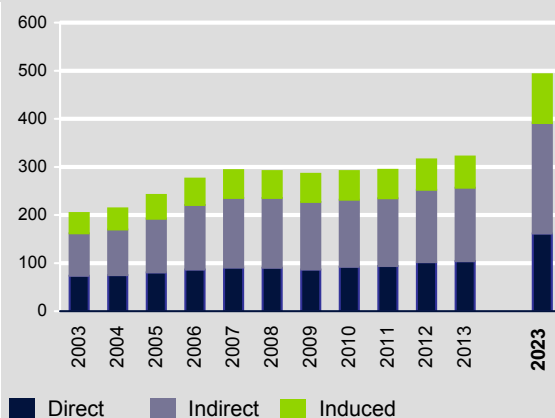
WORLD RANKING (OUT OF 184 COUNTRIES):

Relative importance of Travel & Tourism's total contribution to GDP

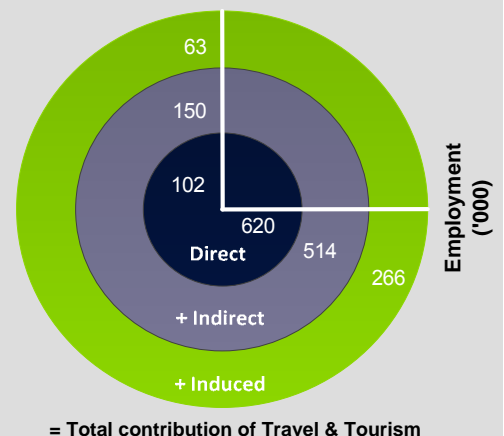
28 ABSOLUTE Size in 2012	85 RELATIVE SIZE Contribution to GDP in 2012	125 GROWTH 2013 forecast	98 LONG-TERM GROWTH Forecast 2013-2023
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Total Contribution of
Travel & Tourism to GDP

2012 ZARbn



Breakdown of Travel & Tourism's Total
Contribution to GDP and Employment 2012
GDP (2012 ZARbn)



Defining the economic contribution of Travel & Tourism

Travel & Tourism is an important economic activity in most countries around the world. As well as its direct economic impact, the industry has significant indirect and induced impacts. The UN Statistics Division-approved Tourism Satellite Accounting methodology (TSA:RMF 2008) quantifies only the direct contribution of Travel & Tourism. But WTTC recognises that Travel & Tourism's total contribution is much greater, and aims to capture its indirect and induced impacts through its annual research.

DIRECT Travel & Tourism contribution

COMMODITIES

- Accommodation
- Transportation
- Entertainment
- Attractions

INDUSTRIES

- Accommodation services
- Food & beverage services
- Retail Trade
- Transportation services
- Cultural, sports & recreational services

SOURCES OF SPENDING

- Residents' domestic T&T spending
- Businesses' domestic travel spending
- Visitor exports
- Individual government T&T spending

INDIRECT Travel & Tourism contribution

- T&T investment spending
- Government collective T&T spending
- Impact of purchases from suppliers

INDUCED contribution (spending of direct and indirect employees)

- Food and beverages
- Recreation
- Clothing
- Housing
- Household goods

TOTAL Travel & Tourism contribution

- To GDP
- To employment

DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists. The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism sectors. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

TOTAL CONTRIBUTION

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc;
- Domestic purchases of goods and services by the sectors dealing directly with tourists - including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.

The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry.

PLEASE NOTE THAT DUE TO CHANGES IN METHODOLOGY BETWEEN 2010 AND 2011, IT IS NOT POSSIBLE TO COMPARE FIGURES PUBLISHED BY WTTC FROM 2011 ONWARDS WITH THE SERIES PUBLISHED IN PREVIOUS YEARS.

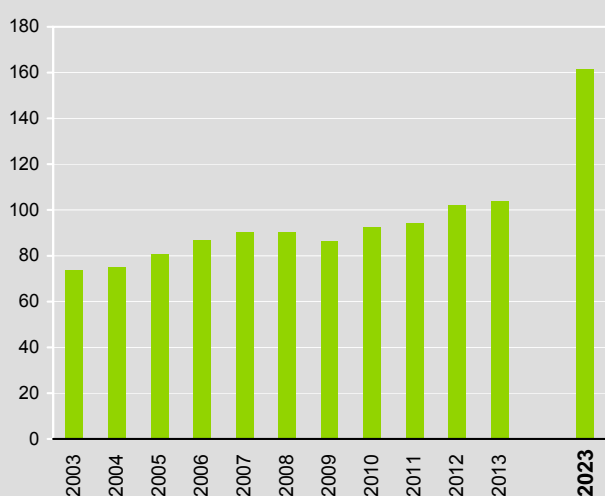
Travel & Tourism's contribution to GDP¹

The direct contribution of Travel & Tourism to GDP in 2012 was ZAR102.0bn (3.2% of GDP). This is forecast to rise by 1.7% to ZAR103.7bn in 2013. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

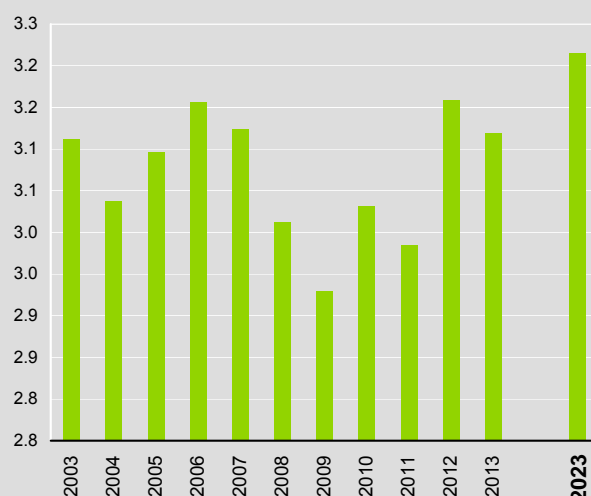
The direct contribution of Travel & Tourism to GDP is expected to grow by 4.5% pa to ZAR161.4bn (3.2% of GDP) by 2023.

SOUTH AFRICA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP

Constant 2012 ZARbn



% of whole economy GDP

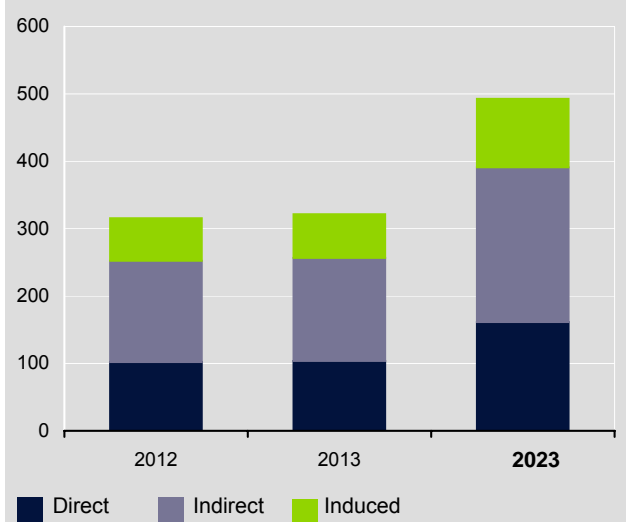


The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was ZAR315.4bn in 2012 (9.8% of GDP) and is expected to grow by 1.9% to ZAR321.5bn (9.7% of GDP) in 2013.

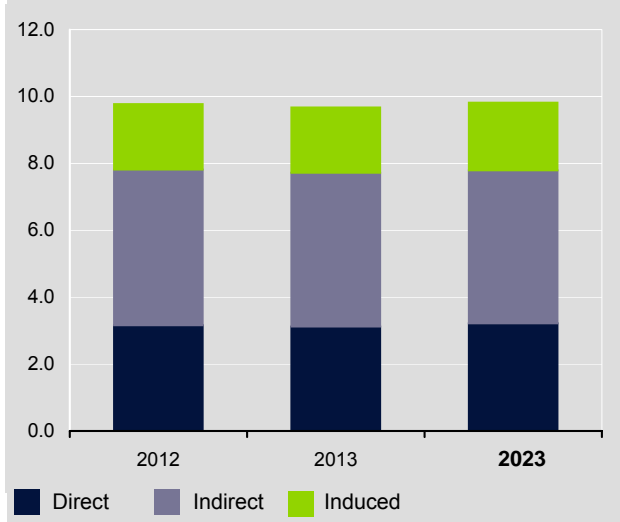
It is forecast to rise by 4.4% pa to ZAR492.7bn by 2023 (9.8% of GDP).

SOUTH AFRICA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP

Constant 2012 ZARbn



% of whole economy GDP



¹ All values are in constant 2012 prices & exchange rates

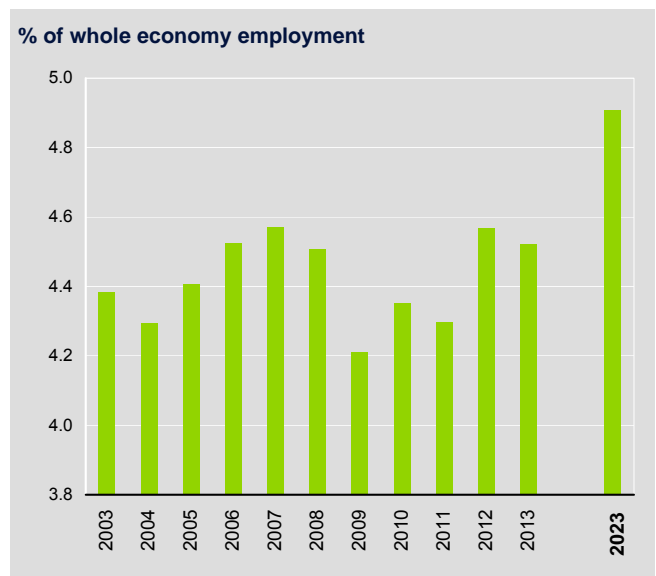
Travel & Tourism's contribution to employment

Travel & Tourism generated 619,500 jobs directly in 2012 (4.6% of total employment) and this is forecast to grow by 0.5% in 2013 to 622,500 (4.5% of total employment).

This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2023, Travel & Tourism will account for 786,000 jobs directly, an increase of 2.4% pa over the next ten years.

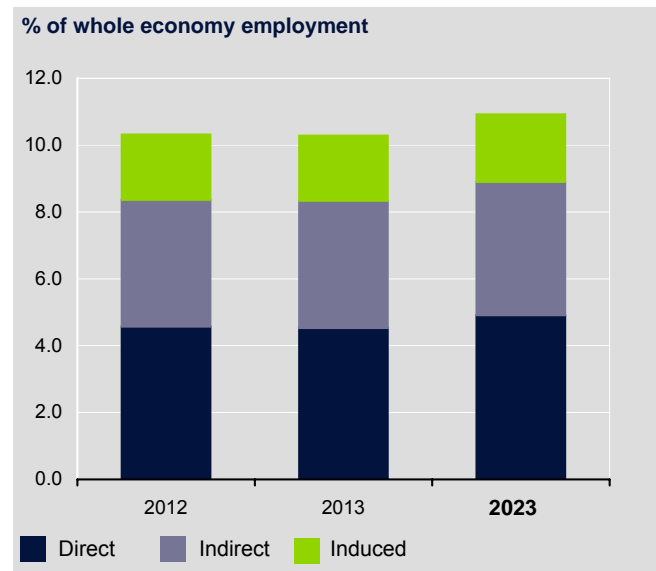
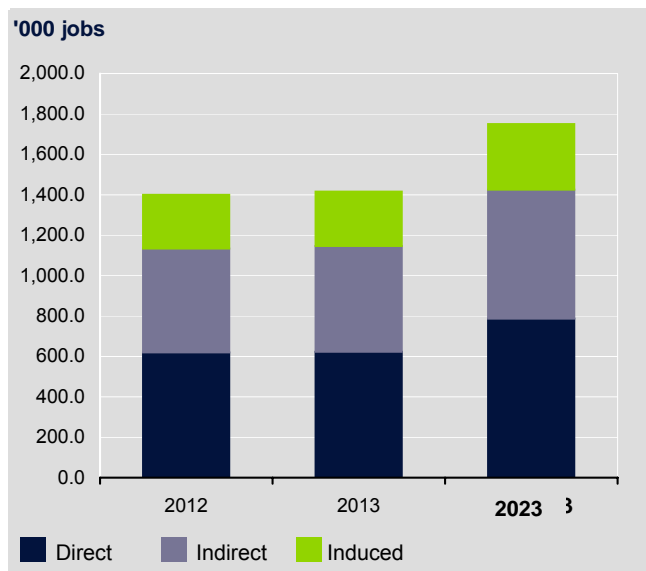
SOUTH AFRICA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 1,399,500 jobs in 2012 (10.3% of total employment). This is forecast to rise by 1.1% in 2013 to 1,415,500 jobs (10.3% of total employment).

By 2023, Travel & Tourism is forecast to support 1,750,000 jobs (10.9% of total employment), an increase of 2.1% pa over the period.

SOUTH AFRICA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



Visitor Exports and Investment¹

VISITOR EXPORTS

Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2012, South Africa generated ZAR93.7bn in visitor exports. In 2013, this is expected to grow by 2.3%, and the country is expected to attract 10,113,000 international tourist arrivals.

By 2023, international tourist arrivals are forecast to total 14,917,000, generating expenditure of ZAR150.3bn, an increase of 4.6% pa.

SOUTH AFRICA: VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS

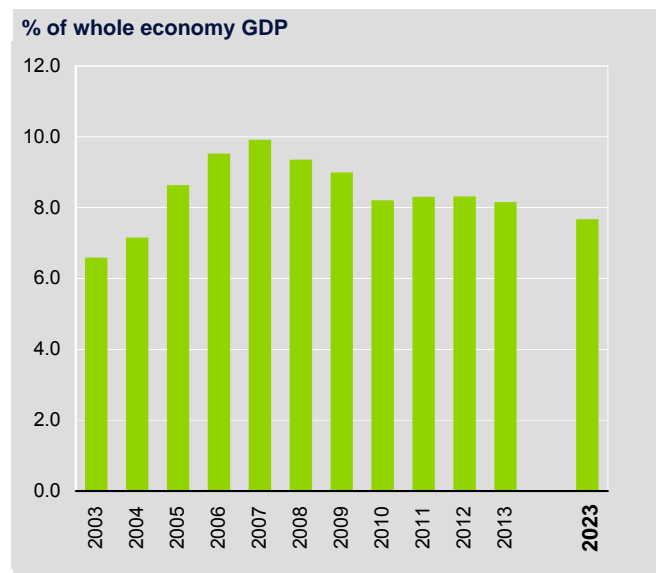


INVESTMENT

Travel & Tourism is expected to have attracted capital investment of ZAR52.1bn in 2012. This is expected to rise by 2.0% in 2013, and rise by 3.5% pa over the next ten years to ZAR74.9bn in 2023.

Travel & Tourism's share of total national investment will fall from 8.1% in 2013 to 7.6% in 2023.

SOUTH AFRICA: CAPITAL INVESTMENT IN TRAVEL & TOURISM



¹ All values are in constant 2012 prices & exchange rates

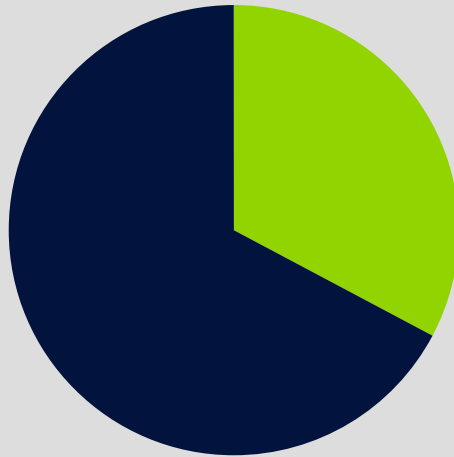
Different components of Travel & Tourism¹

South Africa

Travel & Tourism's Contribution to GDP:
Business vs Leisure, 2012

Leisure spending **67.2%**

Business spending **32.8%**



Leisure travel spending (inbound and domestic) generated 67.2% of direct Travel & Tourism GDP in 2012 (ZAR148.8bn) compared with 32.8% for business travel spending (ZAR72.5bn).

Leisure travel spending is expected to grow by 2.0% in 2013 to ZAR151.8bn, and rise by 4.6% pa to ZAR238.1bn in 2023.

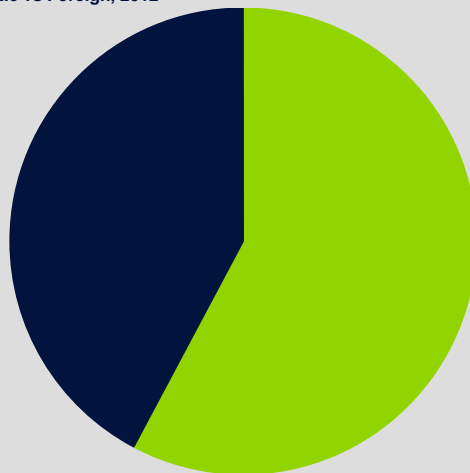
Business travel spending is expected to grow by 0.5% in 2013 to ZAR72.8bn, and rise by 4.2% pa to ZAR109.9bn in 2023.

South Africa

Travel & Tourism's Contribution to GDP:
Domestic vs Foreign, 2012

Foreign visitor spending **42.4%**

Domestic spending **57.6%**



Domestic travel spending generated 57.6% of direct Travel & Tourism GDP in 2012 compared with 42.4% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 0.9% in 2013 to ZAR128.7bn, and rise by 4.4% pa to ZAR197.7bn in 2023.

Visitor exports are expected to grow by 2.3% in 2013 to ZAR95.9bn, and rise by 4.6% pa to ZAR150.3bn in 2023.

South Africa

Breakdown of Travel & Tourism's Total Contribution to GDP, 2012

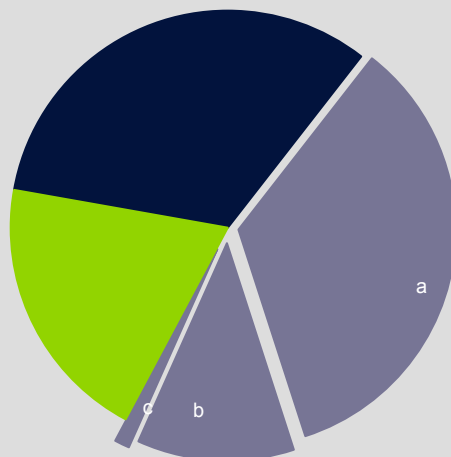
Direct **32.7%**

Induced **19.9%**

Indirect **47.3%**

Indirect is the sum of:

- (a) Supply chain **34.5%**
- (b) Investment **11.8%**
- (c) Government collective **1.1%**



The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 2.

The total contribution of Travel & Tourism to GDP is three times greater than its direct contribution.

¹ All values are in constant 2012 prices & exchange rates

Country rankings: Absolute contribution, 2012

Travel & Tourism's Direct Contribution to GDP		2012 (US\$bn)
	World Average	17.2
34	South Africa	12.2
73	Kenya	2.1
86	Tanzania	1.5
116	Botswana	0.6
120	Madagascar	0.6
127	Zambia	0.5
135	Zimbabwe	0.4
137	Namibia	0.3
167	Lesotho	0.1
169	Swaziland	0.1

Travel & Tourism's Total Contribution to GDP		2012 (US\$bn)
	World Average	52.3
29	South Africa	37.7
74	Kenya	5.3
87	Tanzania	4.1
117	Namibia	1.6
118	Botswana	1.6
119	Madagascar	1.6
134	Zambia	1.1
145	Zimbabwe	0.8
167	Lesotho	0.2
169	Swaziland	0.2

Travel & Tourism's Direct Contribution to Employment		2012 '000 jobs
	World Average	793.7
25	South Africa	619.6
33	Tanzania	422.1
49	Kenya	232.3
53	Madagascar	212.2
117	Zimbabwe	40.6
126	Botswana	31.6
137	Zambia	25.1
141	Namibia	22.6
145	Lesotho	20.3
165	Swaziland	6.2

Travel & Tourism's Total Contribution to Employment		2012 '000 jobs
	World Average	1975.7
29	South Africa	1399.6
32	Tanzania	1199.3
46	Madagascar	618.3
49	Kenya	594.7
120	Namibia	97.1
123	Zimbabwe	86.4
136	Zambia	66.8
139	Botswana	61.2
146	Lesotho	46.3
169	Swaziland	13.8

Travel & Tourism Capital Investment		2012 (US\$bn)
22	South Africa	6.2
	World Average	4.2
66	Tanzania	0.9
77	Kenya	0.6
91	Namibia	0.3
96	Madagascar	0.3
118	Botswana	0.2
151	Zimbabwe	0.1
152	Zambia	0.1
156	Lesotho	0.1
170	Swaziland	0.0

Visitor Exports		2012 (US\$bn)
31	South Africa	11.2
	World Average	6.8
75	Kenya	2.0
81	Tanzania	1.7
99	Botswana	1.0
109	Madagascar	0.8
114	Namibia	0.7
125	Zimbabwe	0.4
150	Zambia	0.2
173	Swaziland	0.0
176	Lesotho	0.0

The tables on pages 7-10 provide brief extracts from the full WTTC Country League Table Rankings, highlighting comparisons with competing destinations as well as with the world average. The competing destinations selected are those that offer a similar tourism product and compete for tourists from the same set of origin markets. These tend to be, but are not exclusively, geographical neighbours.

Country rankings: Relative contribution, 2012

Travel & Tourism's Direct Contribution to GDP		2012 % share
46	Madagascar	5.7
	World Average	5.2
54	Zimbabwe	5.2
56	Kenya	5.0
61	Tanzania	4.8
67	Lesotho	4.6
91	South Africa	3.2
97	Namibia	3.0
100	Botswana	3.0
119	Zambia	2.5
120	Swaziland	2.5

Travel & Tourism's Total Contribution to GDP		2012 % share
45	Madagascar	15.5
50	Namibia	15.1
	World Average	14.1
58	Tanzania	13.2
64	Kenya	12.5
76	Zimbabwe	10.6
80	Lesotho	10.2
85	South Africa	9.8
112	Botswana	7.7
143	Zambia	5.7
148	Swaziland	5.4

Travel & Tourism's Direct Contribution to Employment		2012 % share
	World Average	5.4
59	Botswana	4.7
61	Namibia	4.6
62	South Africa	4.6
65	Madagascar	4.5
71	Kenya	4.3
76	Tanzania	4.0
83	Lesotho	3.9
86	Zimbabwe	3.7
139	Swaziland	2.2
165	Zambia	1.6

Travel & Tourism's Total Contribution to Employment		2012 % share
32	Namibia	19.9
	World Average	13.9
56	Madagascar	13.1
66	Tanzania	11.5
72	Kenya	10.9
75	South Africa	10.3
88	Botswana	9.1
92	Lesotho	8.8
105	Zimbabwe	7.8
155	Swaziland	4.8
165	Zambia	4.2

Travel & Tourism Investment Contribution to Total Capital Investment		2012 % share
19	Madagascar	17.5
37	Namibia	11.2
45	Tanzania	10.4
61	Lesotho	8.3
64	South Africa	8.3
	World Average	8.1
69	Kenya	7.4
72	Zimbabwe	7.1
80	Botswana	6.3
103	Swaziland	4.9
173	Zambia	1.8

Visitor Exports Contribution to Total Exports		2012 % share
40	Tanzania	24.8
44	Madagascar	23.4
51	Kenya	19.1
	World Average	16.6
78	Botswana	10.4
80	South Africa	10.1
85	Zimbabwe	8.9
87	Namibia	8.8
152	Zambia	2.7
160	Lesotho	2.2
161	Swaziland	2.1

Country rankings: Real growth, 2013

Travel & Tourism's Direct Contribution to GDP	2013 % growth
4 Namibia	10.9
22 Zambia	7.6
36 Botswana	6.6
37 Lesotho	6.3
54 Madagascar	5.4
World Average	3.0
104 Tanzania	2.8
121 Zimbabwe	2.1
128 South Africa	1.7
129 Kenya	1.7
164 Swaziland	0.3

Travel & Tourism's Total Contribution to GDP	2013 % growth
6 Namibia	9.0
9 Botswana	8.7
14 Zambia	8.1
37 Lesotho	6.1
64 Madagascar	5.0
90 Tanzania	3.6
World Average	3.0
115 Zimbabwe	2.4
119 Kenya	2.2
125 South Africa	1.9
165 Swaziland	0.3

Travel & Tourism's Direct Contribution to Employment	2013 % growth
2 Namibia	12.6
71 Botswana	3.7
80 Madagascar	3.6
39 Lesotho	3.5
131 Swaziland	2.9
109 Zambia	2.0
14 Zimbabwe	1.4
World Average	1.3
82 South Africa	0.5
89 Kenya	-1.4
106 Tanzania	-1.6

Travel & Tourism's Total Contribution to Employment	2013 % growth
4 Namibia	12.0
13 Botswana	6.9
56 Lesotho	3.3
58 Madagascar	3.1
64 Swaziland	3.0
76 Zimbabwe	2.6
83 Zambia	2.2
World Average	1.7
111 South Africa	1.1
149 Tanzania	-0.8
151 Kenya	-0.9

Travel & Tourism Investment	2013 % growth
2 Botswana	16.6
42 Namibia	7.4
56 Zambia	6.0
87 Kenya	4.7
94 Madagascar	4.2
World Average	3.9
109 Zimbabwe	3.2
127 Lesotho	2.2
128 Tanzania	2.2
129 South Africa	2.0
160 Swaziland	-0.4

Visitor Exports	2013 % growth
11 Namibia	10.2
33 Botswana	6.9
44 Madagascar	6.1
85 Swaziland	3.3
89 Lesotho	3.1
World Average	2.8
103 South Africa	2.3
117 Zimbabwe	1.5
122 Tanzania	1.3
137 Kenya	0.5
172 Zambia	-2.7

Country rankings: Long term growth, 2013 - 2023

Travel & Tourism's Direct Contribution to GDP	2013 - 2023 % growth pa
1 Namibia	9.7
7 Zambia	7.3
16 Lesotho	6.3
24 Tanzania	5.9
26 Zimbabwe	5.8
56 Botswana	5.0
78 Kenya	4.6
83 South Africa	4.5
World Average	4.2
110 Madagascar	3.9
182 Swaziland	1.3

Travel & Tourism's Total Contribution to GDP	2013 - 2023 % growth pa
4 Namibia	7.9
5 Zambia	7.8
14 Lesotho	6.4
15 Tanzania	6.4
27 Zimbabwe	5.9
39 Botswana	5.5
82 Kenya	4.5
98 South Africa	4.4
World Average	4.2
116 Madagascar	3.9
182 Swaziland	1.1

Travel & Tourism's Direct Contribution to Employment	2013 - 2023 % growth pa
2 Namibia	7.6
14 Zimbabwe	4.2
39 Lesotho	3.1
71 Botswana	2.6
80 Madagascar	2.4
82 South Africa	2.4
89 Kenya	2.2
World Average	2.0
106 Tanzania	1.9
109 Zambia	1.9
131 Swaziland	1.4

Travel & Tourism's Total Contribution to Employment	2013 - 2023 % growth pa
2 Namibia	6.4
34 Lesotho	3.3
62 Zambia	2.6
World Average	2.5
67 Zimbabwe	2.5
71 Botswana	2.4
73 Tanzania	2.4
75 Madagascar	2.3
90 Kenya	2.2
91 South Africa	2.1
131 Swaziland	1.2

Travel & Tourism Investment Contribution to Capital Investment	2013 - 2023 % growth pa
3 Zambia	9.0
35 Tanzania	6.1
60 Botswana	5.4
World Average	5.0
80 Namibia	4.7
81 Kenya	4.7
89 Zimbabwe	4.6
128 South Africa	3.5
133 Madagascar	3.4
143 Lesotho	3.0
182 Swaziland	0.8

Visitor Exports Contribution to Exports	2013 - 2023 % growth pa
4 Namibia	8.4
19 Zimbabwe	6.6
36 Tanzania	5.6
72 Kenya	4.6
74 South Africa	4.6
75 Botswana	4.6
World Average	4.0
97 Madagascar	3.9
142 Swaziland	2.8
163 Zambia	2.2
170 Lesotho	1.6

Summary tables: Estimates & Forecasts

South Africa	2012 ZARbn ¹	2012 % of total	2013 Growth ²	ZARbn ¹	2023 % of total	Growth ³
Direct contribution to GDP	102.0	3.2	1.7	161.4	3.2	4.5
Total contribution to GDP	315.4	9.8	1.9	492.7	9.8	4.4
Direct contribution to employment ⁴	620	4.6	0.5	786	4.9	2.4
Total contribution to employment ⁴	1,400	10.3	1.1	1,750	10.9	2.1
Visitor exports	93.7	10.1	2.3	150.3	10.9	4.6
Domestic spending	127.5	4.0	0.9	197.7	3.9	4.4
Leisure spending	148.8	2.1	2.0	238.1	2.2	4.6
Business spending	72.5	1.0	0.5	109.9	1.0	4.2
Capital investment	52.1	8.3	2.0	74.9	7.6	3.5

¹2012 constant prices & exchange rates; ²2013 real growth adjusted for inflation (%); ³2013-2023 annualised real growth adjusted for inflation (%); ⁴'000 jobs

Africa	2012 US\$bn ¹	2012 % of total	2013 Growth ²	US\$bn ¹	2023 % of total	Growth ³
Direct contribution to GDP	72.8	3.8	3.5	123.3	3.7	5.0
Total contribution to GDP	173.1	9.0	3.4	293.6	8.8	5.1
Direct contribution to employment ⁴	8,250	3.0	2.2	10,591	3.0	2.3
Total contribution to employment ⁴	19,252	7.1	2.2	24,848	7.0	2.4
Visitor exports	52.4	7.7	3.4	87.2	8.7	4.9
Domestic spending	69.3	3.6	3.7	117.9	3.6	5.1
Leisure spending	86.9	2.7	4.0	148.7	2.7	5.1
Business spending	34.8	1.0	2.3	56.5	1.0	4.7
Capital investment	25.6	6.5	3.0	42.2	6.1	4.8

¹2012 constant prices & exchange rates; ²2013 real growth adjusted for inflation (%); ³2013-2023 annualised real growth adjusted for inflation (%); ⁴'000 jobs

Worldwide	2012 US\$bn ¹	2012 % of total	2013 Growth ²	US\$bn ¹	2023 % of total	Growth ³
Direct contribution to GDP	2,056.6	2.9	3.1	3,249.2	3.1	4.4
Total contribution to GDP	6,630.4	9.3	3.2	10,507.1	10.0	4.4
Direct contribution to employment ⁴	101,118	3.4	1.2	125,288	3.7	2.0
Total contribution to employment ⁴	261,394	8.7	1.7	337,819	9.9	2.4
Visitor exports	1,243.0	5.4	3.1	1,934.8	4.8	4.2
Domestic spending	2,996.3	4.2	3.2	4,831.2	4.7	4.6
Leisure spending	3,222.1	2.2	3.2	5,196.0	2.3	4.6
Business spending	1,017.4	0.7	3.1	1,572.8	0.7	4.1
Capital investment	764.7	4.7	4.2	1,341.4	4.9	5.3

¹2012 constant prices & exchange rates; ²2013 real growth adjusted for inflation (%); ³2013-2023 annualised real growth adjusted for inflation (%); ⁴'000 jobs

% of total refers to each indicator's share of the relevant whole economy indicator such as GDP and employment. Visitor exports is shown relative to total exports of goods and services. Domestic spending is expressed relative to whole economy GDP. For leisure and business spending, their direct contribution to Travel & Tourism GDP is calculated as a share of whole economy GDP (the sum of these shares equals the direct contribution). Investment is relative to whole economy investment

The economic contribution of Travel & Tourism: Real 2012 prices

South Africa (ZARbn, real 2012 prices)	2007	2008	2009	2010	2011	2012	2013E	2023F
1. Visitor exports	101.7	98.6	88.2	84.9	82.5	93.7	95.9	150.3
2. Domestic expenditure (includes government individual spending)	97.0	101.4	100.8	113.8	121.3	127.5	128.7	197.7
3. Internal tourism consumption (= 1 + 2)	198.7	200.1	189.0	198.7	203.8	221.3	224.6	348.0
4. Purchases by tourism providers, including imported goods (supply chain)	-108.3	-109.7	-102.5	-106.4	-109.9	-119.3	-120.9	-186.6
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	90.4	90.3	86.5	92.3	94.0	102.0	103.7	161.4
Other final impacts (indirect & induced)	98.4	98.3	94.1	100.4	102.3	111.0	112.8	175.7
6. Domestic supply chain								
7. Capital investment	57.7	64.3	57.2	48.3	49.6	52.1	53.1	74.9
8. Government collective spending	2.6	2.6	2.9	3.2	3.3	3.5	3.6	5.2
9. Imported goods from indirect spending	-13.6	-20.3	-13.7	-12.6	-14.7	-16.3	-16.7	-26.2
10. Induced	57.9	55.8	58.3	59.8	59.5	63.3	64.9	101.7
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	293.2	291.1	285.4	291.3	294.0	315.4	321.5	492.7
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	600.2	617.8	559.2	568.1	569.9	619.6	622.5	786.5
13. Total contribution of Travel & Tourism to employment	1407.5	1423.7	1344.8	1315.1	1298.9	1399.6	1415.3	1749.7
Other indicators								
14. Expenditure on outbound travel	61.2	75.0	65.9	67.6	65.3	62.8	65.7	105.8

The economic contribution of Travel & Tourism: Nominal prices

South Africa (ZARbn, nominal prices)	2007	2008	2009	2010	2011	2012	2013E	2023F
1. Visitor exports	70.8	74.4	71.7	73.9	76.2	91.9	101.1	252.5
2. Domestic expenditure (includes government individual spending)	67.6	76.5	81.9	99.1	112.1	125.1	135.8	332.1
3. Internal tourism consumption (= 1 + 2)	138.5	151.0	153.5	173.0	188.3	217.1	0.5	584.7
4. Purchases by tourism providers, including imported goods (supply chain)	-75.5	-82.8	-83.3	-92.7	-101.5	-117.0	108.8	-313.5
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	63.0	68.2	70.3	80.3	86.8	100.0	109.4	271.2
Other final impacts (indirect & induced)	68.6	74.2	76.5	87.5	94.5	108.9	119.0	295.2
6. Domestic supply chain								
7. Capital investment	40.2	48.6	46.5	42.0	45.8	51.1	56.0	125.9
8. Government collective spending	1.8	2.0	2.4	2.7	3.0	3.4	3.8	8.8
9. Imported goods from indirect spending	-9.5	-15.3	-11.1	-11.0	-13.6	-16.0	-17.6	-44.0
10. Induced	40.3	42.1	47.4	52.1	55.0	62.1	68.4	170.8
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	204.3	219.7	231.8	253.7	271.5	309.4	339.1	827.8
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	600.2	617.8	559.2	568.1	569.9	619.6	622.5	786.5
13. Total contribution of Travel & Tourism to employment	1407.5	1423.7	1344.8	1315.1	1298.9	1399.6	1415.3	1749.7
Other indicators								
14. Expenditure on outbound travel	42.6	56.6	53.6	58.8	60.3	61.6	69.4	177.8

*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO).

Historical data for concepts has been benchmarked to match reported TSA data where available.

The economic contribution of Travel & Tourism: Growth

South Africa Growth ¹ (%)	2007	2008	2009	2010	2011	2012	2013E	2023F ²
1. Visitor exports	7.1	-3.0	-10.6	-3.8	-2.8	13.6	2.3	4.6
2. Domestic expenditure (includes government individual spending)	2.2	4.5	-0.6	12.9	6.6	5.1	0.9	4.4
3. Internal tourism consumption (= 1 + 2)	4.6	0.7	-5.5	5.1	2.6	8.5	1.5	4.5
4. Purchases by tourism providers, including imported goods (supply chain)	4.8	1.3	-6.6	3.8	3.2	8.6	1.4	4.4
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	4.5	-0.1	-4.3	6.7	1.9	8.5	1.7	4.5
Other final impacts (indirect & induced)	4.5	-0.1	-4.3	6.7	1.9	8.5	1.7	4.5
6. Domestic supply chain								
7. Capital investment	20.7	11.6	-11.1	-15.7	2.7	5.0	2.0	3.5
8. Government collective spending	0.7	2.5	12.5	7.1	3.5	6.5	3.0	3.9
9. Imported goods from indirect spending	11.9	15.8	-15.7	1.8	6.2	9.4	1.8	4.6
10. Induced	5.1	-3.6	4.6	2.5	-0.5	6.3	2.5	4.6
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	6.4	-0.7	-2.0	2.1	0.9	7.3	1.9	4.4
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	1.9	2.9	-9.5	1.6	0.3	8.7	0.5	2.4
13. Total contribution of Travel & Tourism to employment	2.3	1.2	-5.5	-2.2	-1.2	7.8	1.1	2.1
Other indicators								
14. Expenditure on outbound travel	12.5	22.5	-12.0	2.5	-3.4	-3.8	4.7	4.9

¹2007-2012 real annual growth adjusted for inflation (%); ²2013-2023 annualised real growth adjusted for inflation (%)

Glossary

KEY DEFINITIONS

Travel & Tourism – relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

Direct contribution to GDP – GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Travel & Tourism spending (see below) within a country less the purchases made by those industries (including imports). In terms of the UN's Tourism Satellite Account methodology it is consistent with total GDP calculated in table 6 of the TSA: RMF 2008.

Direct contribution to employment – the number of direct jobs within the Travel & Tourism industry. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

Total contribution to GDP – GDP generated directly by the Travel & Tourism industry plus its indirect and induced impacts (see below).

Total contribution to employment – the number of jobs generated directly in the Travel & Tourism industry plus the indirect and induced contributions (see below).

DIRECT SPENDING IMPACTS

Visitor exports – spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education. This is consistent with total inbound tourism expenditure in table 1 of the TSA: RMF 2008.

Domestic Travel & Tourism spending – spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes. This is consistent with total domestic tourism expenditure in table 2 of the TSA: RMF 2008. Outbound spending by residents abroad is not included here, but is separately identified according to the TSA: RMF 2008 (see below).

Government individual spending – spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

Internal tourism consumption – total revenue generated within a country by industries that deal directly with tourists including visitor exports, domestic spending and government individual spending. This does not include spending abroad by residents. This is consistent with total internal tourism expenditure in table 4 of the TSA: RMF 2008.

Business Travel & Tourism spending – spending on business travel within a country by residents and international visitors.

Leisure Travel & Tourism spending – spending on leisure travel within a country by residents and international visitors.

INDIRECT AND INDUCED IMPACTS

Indirect contribution – the contribution to GDP and jobs of the following three factors:

- **Capital investment** – includes capital investment spending by all sectors directly involved in the Travel & Tourism industry. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use. This is consistent with total tourism gross fixed capital formation in table 8 of the TSA: RMF 2008.
- **Government collective spending** – general government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services. This is consistent with total collective tourism consumption in table 9 of TSA: RMF 2008.
- **Supply-chain effects** – purchases of domestic goods and services directly by different sectors of the Travel & Tourism industry as inputs to their final tourism output.

Induced contribution – the broader contribution to GDP and employment of spending by those who are directly or indirectly employed by Travel & Tourism.

OTHER INDICATORS

Outbound expenditure – spending outside the country by residents on all trips abroad. This is fully aligned with total outbound tourism expenditure in table 3 of the TSA: RMF 2008.

Foreign visitor arrivals – the number of arrivals of foreign visitors, including same-day and overnight visitors (tourists) to the country.

Methodological note

WTTC has an on-going commitment to align its economic impact research with the UN Statistics Division-approved 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008) and has made small revisions to the research both this year and in 2012, following a full refinement in 2011. This has involved further benchmarking of country reports to official, published TSAs, including for countries which are reporting data for the first time, as well as existing countries reporting an additional year's data. New country TSAs incorporated this year were Jordan, Italy and Sweden. As part of the alignment process in 2012, international travel expenditure inflows and outflows related to education were excluded from the data. Three new countries have been added in 2013 (Georgia, Iraq and Uzbekistan), bringing the total countries covered to 184 country reports. Additionally, we also produce a world report and reports on 17 world regions and sub-regions. This year there are 7 reports for special economic and geographic groups, including, for the first time, the Organization of American States (OAS) and the Commonwealth.

Economic and Geographic Groups

APEC (ASIA-PACIFIC ECONOMIC COOPERATION)

Australia, Brunei, Canada, Chile, China, Hong Kong, Indonesia, Japan, South Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Taiwan, Thailand, USA, Vietnam.

G20

Argentina, Australia, Brazil, Canada, China, European Union, France*, Germany*, India, Indonesia, Italy*, Japan, Mexico, Russian Federation, Saudi Arabia, South Africa, South Korea, Turkey, UK*, USA.

MEDITERRANEAN

Albania, Algeria, Bosnia Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Montenegro, Morocco, Serbia, Slovenia, Spain, Syria, Tunisia, Turkey, Jordan, Macedonia, Portugal.

OAS (ORGANIZATION OF AMERICAN STATES)

Argentina, Antigua and Barbuda, Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Dominica, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, St Kitts and Nevis, Nicaragua, Panama, Paraguay, Peru, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago, USA, Uruguay.

OECD (ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT)

Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, South Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, USA.

OTHER OCEANIA

American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa, Tuvalu.

SADC (SOUTHERN AFRICAN DEVELOPMENT COMMUNITY)

Angola, Botswana, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe.

THE COMMONWEALTH

Anguilla, Antigua and Barbuda, Australia, Bahamas, Bangladesh, Barbados, Belize, Bermuda, Botswana, Brunei, Cameroon, Canada, Cayman Islands, Cyprus, Dominica, Gambia, Ghana, Grenada, Guyana, India, Jamaica, Kenya, Kiribati, Lesotho, Malawi, Malaysia, Maldives, Malta, Mauritius, Mozambique, Namibia, Nigeria, New Zealand, Pakistan, Papua New Guinea, Rwanda, South Africa, Seychelles, Sierra Leone, Singapore, Solomon Islands, Sri Lanka, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Swaziland, Tanzania, Tonga, Trinidad and Tobago, Uganda, UK, British Virgin Islands, Vanuatu, Zambia.

*included in European Union

Economic impact reports:

Regions, sub-regions and countries

WORLD											
REGION	SUB-REGION	COUNTRY	REGION	SUB-REGION	COUNTRY	REGION	SUB-REGION	COUNTRY	REGION	SUB-REGION	COUNTRY
AFRICA	NORTH AFRICA	Algeria	AMERICAS	CARIBBEAN	Anguilla	ASIA-PACIFIC	NORTHEAST ASIA	Japan	EUROPE	EUROPEAN UNION	Lithuania
		Egypt			Antigua & Barbuda			China			Luxembourg
		Libya			Aruba			Hong Kong			Malta
		Morocco			Bahamas			South Korea			Netherlands
		Tunisia			Barbados			Macau			Poland
	SUB-SAHARAN	Angola			Bermuda		OCEANIA	Taiwan			Portugal
		Benin			Cayman Islands			Mongolia			Romania
		Botswana			Cuba			Australia			Slovakia
		Burkina Faso			Former Netherlands Antilles			New Zealand			Slovenia
		Burundi			Dominica			Fiji			Spain
		Cameroon			Dominican Republic			Kiribati			Sweden
		Cape Verde			Grenada		SOUTH ASIA	Other Oceania			UK
		Central African Republic			Guadeloupe			Papua New Guinea		OTHER EUROPE	Albania
		Chad			Haiti			Solomon Islands			Armenia
		Comoros			Jamaica			Tonga			Azerbaijan
		Democratic Republic of Congo			Martinique			Vanuatu			Belarus
		Ethiopia			Puerto Rico		SOUTHEAST ASIA	Bangladesh			Bosnia Herzegovina
		Gabon			St Kitts & Nevis			India			Croatia
		Gambia			St Lucia			Maldives			Georgia
		Ghana			St Vincent & the Grenadines			Nepal			Iceland
		Guinea			Trinidad & Tobago			Pakistan			Kazakhstan
		Ivory Coast			UK Virgin Islands			Sri Lanka			Kyrgyzstan
		Kenya			US Virgin Islands			Brunei			Macedonia
		Lesotho		LATIN AMERICA	Cambodia	Moldova					
		Madagascar			Indonesia	Montenegro					
		Malawi			Laos	Norway					
		Mali			Malaysia	Russian Federation					
		Mauritius			Myanmar	Serbia					
		Mozambique			Philippines	Switzerland					
		Namibia			Singapore	Turkey					
		Niger			Thailand	Ukraine					
		Nigeria			Vietnam	Uzbekistan					
		Republic of Congo			EUROPEAN UNION	MIDDLE EAST		Bahrain			
		Reunion						Austria		Iran	
		Rwanda						Belgium		Iraq	
		Sao Tome & Principe						Bulgaria		Israel	
		Senegal						Cyprus		Jordan	
		Seychelles						Czech Republic		Kuwait	
		Sierra Leone						Denmark		Lebanon	
		South Africa						Estonia		Oman	
		Sudan						Finland		Qatar	
		Swaziland		France				Saudi Arabia			
		Tanzania		Germany				Syria			
		Togo		Greece				UAE			
		Uganda		Hungary				Yemen			
		Zambia		Ireland							
		Zimbabwe		Italy							
	Latvia										

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Jim Compton
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Deep Kalra
Founder & Chief Executive

NORTHERN CAUCACUS RESORTS
Alexey Anatolyevich
Director General

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Selim El Zyr
President & CEO

SHKP HOTELS
Ricco De Blank
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General Partner
WTTC Chairman (1990-1994)

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ABERCROMBIE & KENT
Geoffrey J W Kent
Founder, Chairman & CEO
WTTC Chairman (2007-2012)

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Chairman

WTTC Chairman (2004-2007)
INTERCONTINENTAL HOTELS GROUP
Sir Ian Prosser
Retired Chairman
WTTC Chairman (2001-2003)

AMERICAN EXPRESS
Harvey Golub
Retired Chairman & CEO
WTTC Chairman (1996-2001)

ROBERT H BURNS HOLDINGS
Robert H Burns
Chairman
WTTC Chairman (1994-1996)

IMMEDIATE PAST PRESIDENT

CREWE ASSOCIATES
Jean-Claude Baumgarten
Chairman & MD

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal grey lines across the entire width of the page, typical of notebook or legal stationery. There are no margins, text, or other markings present.

Notes

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