

OTHER DATA SOURCES: DATA LICENSES

PROVINCIAL TOURISM STATISTICS WORKSHOP

26 JULY 2023

broadening horizons



tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA



Outline of Presentation

- Introduction and background
- Different data licences accessed by the Department
 - Type of data/information provided
 - Frequency of the data/information
 - Format of the data/information
 - Scope of the data/information
 - User perspective
- Status of subscriptions and conclusion



Introduction and Background

- The Directorate: Statistical Analysis is responsible for monitoring the performance of the Tourism Sector.
- In order to provide a detailed analysis and insight on the performance of the Tourism Sector globally and nationally, the most relevant and updated data is required.
- In addition to official sources of data for example: Statistics South Africa (Stats SA) and United Nations World Tourism Organisation (UNWTO), other key sources of tourism data have been identified to report on tourism performance.
- These data sources are used to complement the official sources of data.



STR GLOBAL HOTEL



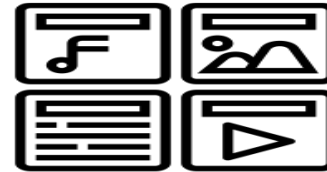
OFFICIAL DATA SOURCE:
Stats SA Accommodation
Survey

DATA/INFORMATION PROVIDED



Hotel performance data for the following indicators; Occupancy rates, Average Daily Rate and Revenue Per Available Room

FORMAT OF THE DATA/INFORMATION



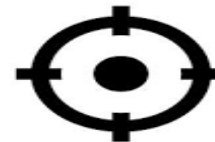
Excel

FREQUENCY OF THE DATA/INFORMATION



Annual and monthly

SCOPE OF THE DATA/INFORMATION



Global, country, provincial and city level

USER PERSPECTIVE

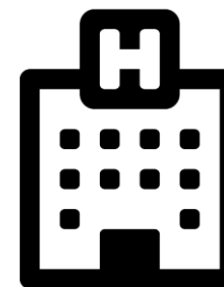


+ Data is also used by the World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC) as a source of data for their reports.

- + Definitions are provided
- Sample sizes are small
- Mostly used for trend analysis



EXAMPLE OF STR HOTEL DATA PROVIDED



Hotel performance 2021 Compared to 2020

Region	Occupancy Rate (%)				Average Daily rate (ADR)				Revenue per available Room (RevPar)			
	2021	% change from 2020	2020	% change from 2019	US\$ 2021	% change from 2020	US\$ 2020	% change from 2019	US\$ 2021	% change from 2020	US\$ 2020	% change from 2019
Asia and the Pacific	48,7	9,4%	44,5%	-35,6%	77,71	4,7%	7 499	-22,2%	37,83	14,5%	3 339	-49,9%
Americas	55,8	30,7%	30,0%	-48,7%	123,63	19,6%	7 875	-10,1%	68,99	56,3%	2 362	-53,9%
Europe	43,3	30,7%	33,1%	-54,2%	127,71	16,4%	9 334	-18,2%	52,69	52,1%	3 086	-62,5%
Africa & Middle East	51	26,9%	45,9%	-30,3%	131,37	17,2%	11 723	-17,3%	67,05	48,7%	5 377	-42,4%
Global Average	49,7	24,4%	38,4%	-42,2%	115,105	14,5%	9 108	-17,0%	56,64	42,9%	3 541	-52,2%

Source str Global Hotel Review: December 2021

EUROMONITOR



OFFICIAL DATA SOURCE:

Stats SA, UNWTO, SA
Tourism

DATA/INFORMATION PROVIDED



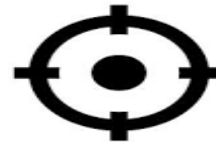
Provides tourism data/information on the key travel and tourism indicators for 205 countries including South Africa. The data can be accessed via a database known as Travel Passport. Euromonitor's Travel Forecast Model also provides forecasted data for international arrivals using latest available data from the United Nations World Tourism Organisation (UNWTO) and further expert adjustments from Euromonitor International's travel research team for future years. The impact of COVID-19 on tourist arrivals under different scenarios was also included in the Travel Forecast Model.

FREQUENCY OF THE DATA/INFORMATION



Annual

SCOPE OF THE DATA/INFORMATION



Global and country level

FORMAT OF THE DATA/INFORMATION



Excel, PowerPoint and PDF



EUROMONITOR CONT...

USER PERSPECTIVE

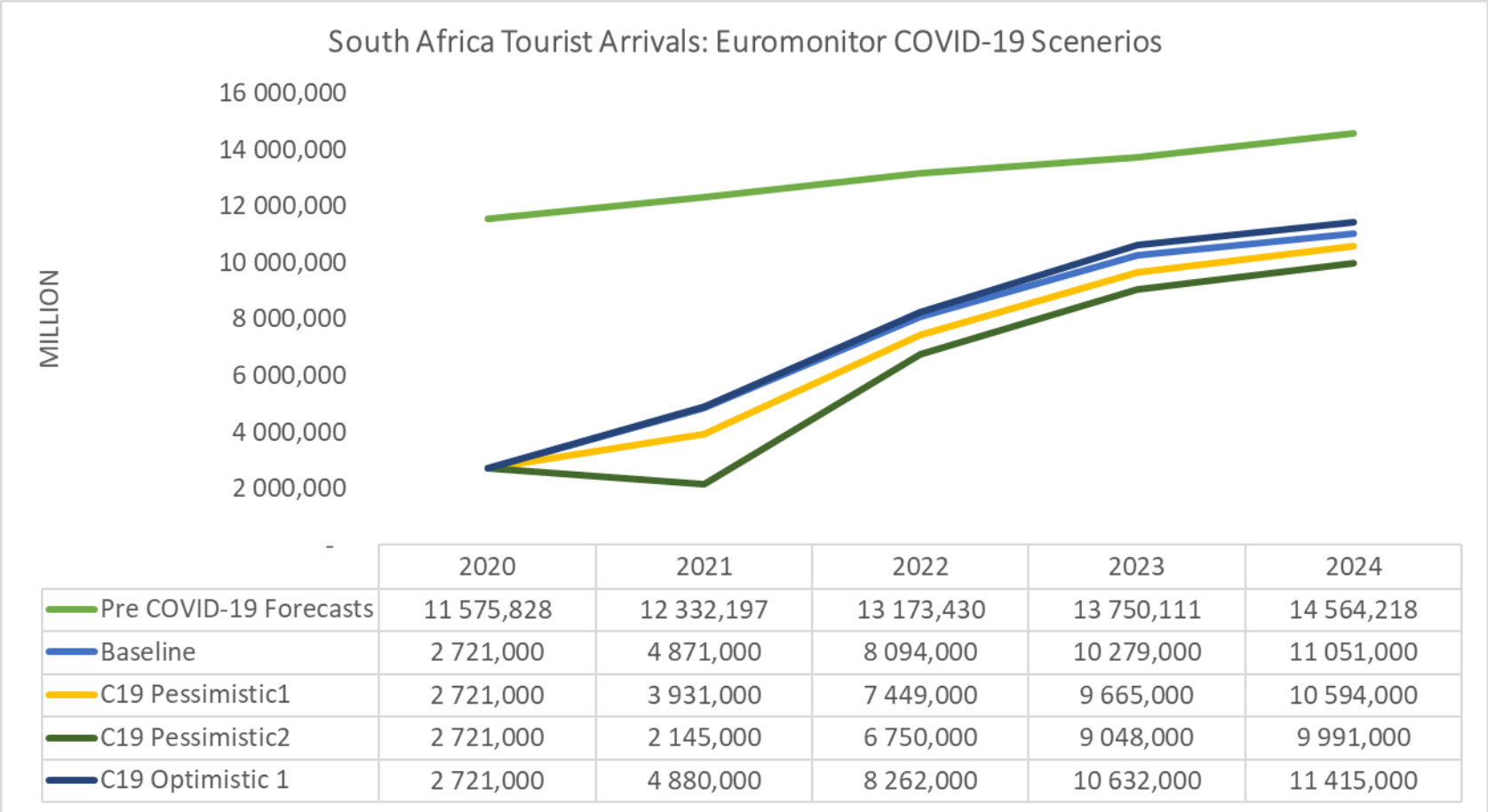


- + The data is sourced from a dashboard which is user friendly.
- + Definitions are provided.
- + The assumptions for forecasted data is provided.
- Data is only provided at a national level and on an annual basis.
- Cost for license is high in the current economic climate.
- Some of the provinces using same licenses which can be duplication of resources



EXAMPLE OF DATA PROVIDED

SA TOURIST ARRIVALS: EUROMINOTOR COVID 19 SCENARIOS



SA TOURIST ARRIVALS ESTIMATES: EUROMINOTOR COVID 19 SCENARIOS

Pre C19 Forecasts	Baseline	C19 Pessimistic 1	C19 Pessimistic 2:	C19 Optimistic 1
<ul style="list-style-type: none"> • This scenario reproduces the last pre-COVID-19 pandemic forecast from January 2020. • Our baseline global GDP growth forecast (as of January 2020) has remained stable since Q4 2019 at around 3% in 2020 (similar to 2019), improving slightly to 3.2% growth in 2021. • Positive factors in the outlook remain above average consumer confidence in key economies, supportive monetary policy and low financial system stress. • Negative factors for the outlook include ongoing geopolitical and trade war risks, declining business confidence, high corporate debt levels in key economies, and uncertainty surrounding the recent coronavirus outbreak in China. 	<ul style="list-style-type: none"> • The baseline forecast assumes 1-2 global pandemic waves in the first half of 2021. • Global real GDP growth is 5.5-6.5% in 2021 and 3.8-5.3% in 2022. • Most social distancing restrictions are lifted in advanced economies in Q2-Q3 2021. Local lockdowns and strict social distancing measures are likely to persist in developing economies into 2022. • Vaccination rates sufficient for approaching herd immunity are attained in advanced economies in Q3-Q4 2021. In developing economies vaccination rates remain too low to approach herd immunity until the end of 2022- first half of 2023. • Global business and consumer confidence levels return to historic averages by Q3 2021. 	<ul style="list-style-type: none"> • In the COVID-19 Pessimistic1 scenario there are 2-4 global pandemic waves in 2021-2022. • Global real GDP growth is 4-5% in 2021 and 0.2-1.5% in 2022. • The spread of more infectious and vaccine resistant COVID-19 virus mutations leads to more intense and longer lasting lockdowns and social distancing measures. • Significant COVID-19 related social distancing restrictions/behaviours need to be reinstated in advanced economies in the 2nd half of 2021, continuing into 2022. They continue into 2023 for developing economies. • Vaccination rates sufficient for herd immunity are attained in advanced economies in Q4 2021- Q3 2022. Vaccination rates in developing economies remain insufficient for approaching herd immunity into 2023. 	<ul style="list-style-type: none"> • In the COVID-19 Pessimistic2 scenario there are 3-5 global pandemic waves in 2021-2022. • Global real GDP grows by 3-4% in 2021 and declines by 1.3-2.7% in 2022. • The spread of more infectious and vaccine resistant virus mutations leads to more intense and longer lasting lockdowns and social distancing measures. • Significant COVID-19 related social distancing restrictions/behaviours need to be reinstated in advanced economies in the 2nd half of 2021, continuing into 2022. They continue into 2023 for developing economies. • Logistical complications, significant population resistance to vaccination and lower effectiveness of vaccines against new virus variants delay sufficient vaccination rates for herd immunity in advanced economies to the end of 2022 or first half of 2023. 	<ul style="list-style-type: none"> • The Covid-19 Optimistic1 scenarios assumes 1-2 global pandemic wave in the first half of 2021, with faster than expected vaccination and economic recovery rates. • Global real GDP growth is 6.3-7% in 2021 and 6-7% in 2022. • Significant COVID-19 related social distancing restrictions/behaviours last for another 1-3 quarters in 2021. • Vaccination rates sufficient for herd immunity are attained in advanced economies in Q2-Q3 2021. • Global business and consumer confidence levels return to historic averages by Q2 2021. • Stronger fiscal stimulus effects in advanced economies, high cumulated savings and the faster rebound in consumer confidence speed up the recovery in consumer spending.

Source: Euromonitor, 24 August 2021

OAG: AVIATION DATA



OFFICIAL DATA SOURCE:

ACSA Data Cuts

DATA/INFORMATION PROVIDED



Data for the following indicators can also be sourced from OAG analytics:

- passengers by airline, alliance, departure/arrival airports, city, country, region;
- aviation equipment type;
- airfare data;
- air-route by frequency and capacity; and
- bookings.

The data source for OAG flight data is a combination of proprietary and publicly available data. OAG (Official Airline Guide) collects data from airlines, airports, global distribution systems (GDS), and other industry sources.

FREQUENCY OF THE DATA/INFORMATION



Weekly, monthly, annually

FORMAT OF THE DATA/INFORMATION

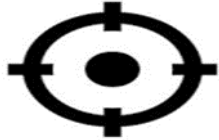


Excel and PDF



OAG Cont....

SCOPE OF THE DATA/INFORMATION



Airports in the country

USER PERSEPECTIVE



- + The data is updated weekly.
- + Definitions are provided.
- + Comprehensive data source (GDS) Global Distribution Systems.
- The data tool is difficult to navigate but training can be provided.
- Cost for license is high in the current economic climate.
- Forward Bookings are based only on capacity and not actual bookings.



EXAMPLE OF OAG DATA PROVIDED



Publish	Flight N	Origin	Destina	Depart	Arrival	Frequency	Seats	Time series		
	033	LHR	JNB	1845	0735		2	582	201402	Feb
	033	LHR	JNB	1845	0735		9	2683	201402	Feb
	033	LHR	JNB	1845	0735		1	299	201403	March
	043	LHR	CPT	1735	0700		2	598	201402	Feb
	043	LHR	CPT	1735	0700		5	1495	201402	Feb
	043	LHR	CPT	1735	0700		6	2022	201403	March
	043	LHR	CPT	1735	0700		21	7077	201402	Feb
	043	LHR	CPT	1735	0700		23	7751	201403	March
	055	LHR	JNB	1800	0655		8	3752	201402	Feb
	055	LHR	JNB	1800	0655		4	1876	201403	March
	055	LHR	JNB	1800	0655		2	598	201403	March
	055	LHR	JNB	1800	0655		5	2345	201403	March
	055	LHR	JNB	1800	0655		11	5159	201403	March
	055	LHR	JNB	1800	0655		2	598	201403	March
	055	LHR	JNB	1800	0655		11	3707	201402	Feb
	055	LHR	JNB	1800	0655		5	1685	201403	March
	055	LHR	JNB	1800	0655		9	2691	201402	Feb
	055	LHR	JNB	1910	0710		5	1463	201404	April

Source : OAG Data

FORWARDKEYS



OFFICIAL DATA SOURCE:

ACSA Data Cuts

DATA/INFORMATION PROVIDED



Data for the following indicators can also be sourced from ForwardKeys:

- Total passengers;
- Seat capacity; and
- Actual Air Reservations – On the book.

The source for ForwardKeys aviation data is their proprietary database, which collects and analyzes air travel booking information from multiple sources, including airlines, travel agencies, tour operators, and online booking platforms.

FREQUENCY OF THE DATA/INFORMATION



Weekly, monthly, annually

SCOPE OF THE DATA/INFORMATION



Airports in the country



FORWARD KEYS Cont....

FORMAT OF THE DATA/INFORMATION



Excel and PDF

USER PERSEPECTIVE



- + The data is updated weekly.
- + Definitions are provided.
- + The data tool is easy to navigate.
- Cost for license is high in the current economic climate.
- Some of the provinces using same licenses which can be duplication of resources



EXAMPLE OF FORWARD KEYS DATA PROVIDED



	Last Month			Year-to-Date			Moving Year		
	Jun 23	Var.%	Share	Jan-Jun 23	Var.%	Share	Jul 22-Jun 23	Var.%	Share
TOTAL INTERNATIONAL	115 211	37,6%	100,0%	852 776	51,9%	100,0%	1 653 246	84,3%	100,0%
SELECTED SM	87 628	42,0%	76,1%	676 967	54,3%	79,4%	1 304 318	89,0%	78,9%
Germany	4 462	14,6%	3,9%	80 139	41,4%	9,4%	151 804	64,6%	9,2%
U.S.A.	28 944	38,2%	25,1%	127 887	65,6%	15,0%	235 228	78,6%	14,2%
India	4 649	39,7%	4,0%	22 469	105,4%	2,6%	39 302	167,6%	2,4%
Japan	519	79,6%	0,5%	2 411	166,7%	0,3%	4 116	252,1%	0,2%
China	1 276	#####	1,1%	4 776	#####	0,6%	5 652	#####	0,3%
New Zealand	952	76,0%	0,8%	6 953	183,8%	0,8%	15 349	476,8%	0,9%
Australia	3 107	34,9%	2,7%	20 437	94,2%	2,4%	39 713	241,7%	2,4%
Brazil	637	-22,2%	0,6%	4 626	37,0%	0,5%	9 594	55,1%	0,6%
Argentina	179	225,5%	0,2%	1 037	145,2%	0,1%	1 874	233,5%	0,1%
Switzerland	1 409	41,0%	1,2%	19 312	33,1%	2,3%	39 304	48,4%	2,4%
Austria	535	39,3%	0,5%	7 983	78,1%	0,9%	15 001	94,8%	0,9%
United Kingdom	15 132	39,4%	13,1%	166 626	34,6%	19,5%	320 953	81,5%	19,4%
United Arab Emirates	6 504	127,5%	5,6%	26 496	54,3%	3,1%	55 007	120,1%	3,3%
Ireland	1 776	41,9%	1,5%	11 197	50,1%	1,3%	21 322	89,3%	1,3%

Source : Forward Keys Data



DATA/INFORMATION PROVIDED



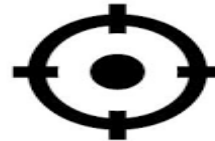
Access to a dataset which includes travel and economic activity data for 185 countries. Indicators such as traveler origins, destinations, purpose of trip, visitor spending, and mode of travel is accessible using the database. Forecasted economic data for a period of ten years is also available.

FREQUENCY OF THE DATA/INFORMATION



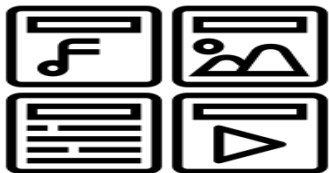
Quarterly and annual

SCOPE OF THE DATA/INFORMATION



Global and Country level

FORMAT OF THE DATA/INFORMATION



Excel, PowerPoint and PDF



OXFORD ECONOMICS

USER PERSPECTIVE



- + Has all travel indicators for travel in one data source.
- + The data tool is easy to navigate.
- The assumptions for forecasted data is not clearly outlined in the tool but can be provided on request.



STATUS OF SUBSCRIPTIONS AND CONCLUSION

STR Global Hotel

- Process of being renewed
- Discussions are underway to check if provinces can partner is accessing the license at a discounted rate.

Euromonitor

- Due to limited budget, have not been able to renew for the calendar year.
- Checking possibility of renewing for remaining months of the year.
- Discussions was underway for the possibility to include provinces in the subscription.

OAG

- Due to limited budget, have not been able to renew for the calendar year.

FowardKeys

- SA Tourism

Oxford Economics

- SA Tourism



THANK YOU