Tourism Statistics Availability on Local Municipal Level

By Erenei Louw

12/03/2025

PROBLEM STATEMENT

- Although nationally we have the TSA, in South Africa there are no published tourism statistics for cities and towns. Tourism landscape is sometimes very different.
- Cities and towns therefore have to capture their own data and develop their own research instruments to measure the true economic impact of tourism to their respective cities and towns.
- Unless cities and towns can measure the economic impact they will be unable to express tourism as a percentage contribution to local GDP.
- The methodology and system for capturing data may not be the same in each city and town.

WHY?

- Monitoring destination performance of tourism in terms of visitor numbers, bed nights, seasonality and impact on the economy.
- Providing valuable data for policy development, planning purposes and infrastructure developments.
- Identifying trends and seasons – when is action required i.e. events etc.
- Building Visitor Profiles and Demographics for marketing and strategic purposes in order to attract more visitors.
- Monitoring own performance – VIC Enquiries, Bookings, Marketing etc.

DATA NEEDS

- Tourism Infrastructure and Supply (database)
- Accommodation Occupancies
- Visitor Numbers/Bednights
- Visitor Profiles and Demographics
- Airlift / Attraction Performance
- Economic Impact of Tourism on GDP
- Job creation/sustaining figures
- Bookings and Enquiries
- Marketing platform trends and performance
- Destination Perception / Media monitoring
- Event/Conference Impact Assessments (basic assessments)
- Adhoc Research Studies – Research Agenda

SOLVING THE PROBLEM

- The only real indicator on local level is accommodation occupancy data
- Other supporting indicators include Airport Data, Attractions Data
- Supply Side Audit – continuous updating (live system)
- NMBT started collecting occupancy data monthly from June 2010. Online and automated system linked to supply side database.
- Developed methodology to calculate visitor numbers and spend. There has been minor changes in the methodology so the trends are reliable.
- Reliability of national statistics - required constant analysis – National Tourism Statistics Framework.
- Collection and submission of data does not always meet requirements – good relationships key with tourism products and associations.
- Partnerships with NMU – economics and tourism departments to improve and further develop the framework

IMPROVING TOURISM

- The data collected can now accurately inform our strategies
- The Tourism Master Plan developed – linked to IDP and City's Economic Growth and Development Strategy.
- Identifies the work that has to be done by all stakeholders, internal and external, in order to improve the destinations attractiveness and the visitor experience in the destination.
- The draft Master Plan Report identifies key intervention areas and detailed situational analysis (SWOT) for each area.
- Clear Action Items that can be monitored

TOURISM MASTERPLAN

TMP CLUSTERS:

- Research, Information, Knowledge Management and Governance
- Policy and Legislative Framework
- Collaborative Partnerships
- Prioritizing Tourism at National, Provincial and Local Government Levels
- Marketing and Brand Management
- Business and Events Tourism
- Tourism Growth and Development
- Quality Assurance
- People Development
- Tourism Safety
- Destination Access

TOURISM MASTERPLAN

RESEARCH CLUSTER:

- Develop and enhance institutional capacity to conduct and manage tourism research
- Enhance the current dedicated tourism research capacity and collaborate with Nelson Mandela University to provide credible market intelligence information
- Collaborate and participate on National and Provincial Research Initiatives
- Review and update tourism research agenda
- Promote and share relevant data with investors, developers and relevant stakeholders

NMBTRSC OBJECTIVES

The following objectives are set to address the challenges identified and direct the focus of the NMB Tourism Research and Statistics Committee (NMBTRSC):

- to provide a platform for tourism research, statistics and information-sharing amongst relevant stakeholders;
- to develop, support and influence the Local Tourism Research Agenda and Statistics Plan in line with the **National Tourism Research Agenda** and **National Tourism Statistics Plan**;
- to provide a peer review platform for research outputs from the Tourism Research Agenda conducted by organisations represented;
- to encourage collaboration on research initiatives among organisations to achieve the local Tourism Research Agenda;
- to promote the consistent use of standardised terms and research methodologies.

TOURISM RESEARCH AGENDA

NATIONAL TOURISM RESEARCH AGENDA

- Travel Facilitation: Challenges in aviation (air service agreements, routing, capacity, pricing, licensing) and visa issues.
- SMME Development and Transformation: SMME funding mechanisms, transformation, and broader SMME development.
- Tourism Sector Demand and Supply: SMME development, funding, pandemic management, and the meetings/events sector.
- Destination Development/Management: Transport infrastructure, finance, governance, safety, route/product development, and enhancement.
- Destination Marketing: Domestic tourism, market trends, competitiveness, and tourist experiences.
- Niche Tourism: Community-based, township, rural, events, eco/adventure, and geo-tourism.
- Responsible Tourism: Universal accessibility, sustainable tourism, and climate change.
- Information Communication and Technology: Digital network infrastructure, AI, robotics, and cybersecurity.

RESEARCH ACTION ITEMS

- Review of National Research Agenda
- Establish/Review Local Research Agenda
- Implementation of Identified Research Studies
- Sharing of findings with Industry – Annual Event, Online Knowledge Portal
- Compile a Tourism Resource Audit / Study and Gap Analysis to identify opportunities of each sub tourism sector (TMP)
- Develop and implement Responsible Tourism Plan (TMP)

STATISTICS ACTION ITEMS

- Implement and review action items identified in the National Tourism Statistical Framework
- Review and Improve current NMB Baseline Methodology in line with the National Tourism Statistical Framework
- Event Economic Impact Assessment Tool
- Improve data collection and reporting efforts

TOURISM STATISTICS

What do we have available now?

TOURISM BASELINE

Nelson Mandela Bay Tourism Baseline	Units	2019	2020	2021	2022	2023
Foreign Visitors (EC)	Pax	421,947	110,231	62,401	189,163	298,088
Foreign Visitors (NMB)	Pax	307,733	87,366	44,401	145,656	226,532
Increase %	%	-7.9%	-71.6%	-49.2%	228.0%	55.5%
Foreign Bednights / Visitor Days	Bednights	761,596	257,612	142,353	308,020	643,960
- Foreign Bednights Paid	Bednights	372,470	123,947	80,161	265,441	406,780
- Foreign Bednights VFR	Bednights	389,126	133,665	62,192	42,579	237,180
- Foreign Bednights VFR Share	%	51.1%	51.9%	43.7%	13.8%	36.8%
- Average Bednights per Visitor (All)	Bednights	2.5	2.9	3.2	2.1	2.8
- Average Bednights per Visitor (Paid)	Bednights	1.2	1.4	1.8	1.8	1.8
Foreign Direct spend	Rand	634,102,668	215,182,320	111,435,308	316,260,161	750,430,515
- Average Spend per Visitor per day	Rand	833	835	783	1,027	1,165
Domestic Visitor Profile	Pax	4,266,384	1,122,158	1,360,920	1,914,459	1,882,960
Increase %		76.3%	-73.7%	21.3%	40.7%	-1.6%
Staying in Formal Accommodation	Pax	847,829	338,138	459,844	551,315	587,566
VFR Overnight Visitors	Pax	1,954,911	371,924	470,619	646,303	592,692
Day Visitors to NMB	Pax	1,463,644	412,096	430,456	716,840	702,702
Domestic Bednights	Bednights	9,308,135	2,367,561	3,209,957	4,191,666	4,130,902
- Domestic Bednights Paid	Bednights	2,815,711	1,127,452	1,586,392	1,929,603	2,056,480
- Domestic Bednights VFR	Bednights	6,492,424	1,240,108	1,623,565	2,262,062	2,074,422
- Domestic VFR Bednight Share	%	69.7%	52.4%	50.6%	54.0%	50.2%
Average Spend per Visitor / Per Day	Rand	725	872	1,024	820	956
Domestic Direct spend Overall	Rand	7,809,391,898	2,422,763,217	3,726,004,890	4,024,048,244	4,620,452,447
Overall Direct Spend	**Rand**	**8,443,494,566**	**2,637,945,537**	**3,837,440,199**	**4,340,308,405**	**5,370,882,963**
Growth	**%**	**65.0%**	**-68.8%**	**45.5%**	**13.1%**	**23.7%**

FOREIGN TOURISM
QUARTER 3 - 2024

REGION	VISITORS		SHARE SA/EC	BEDNIGHTS		SPEND		LENGTH OF STAY
SOUTH AFRICA	2,084,792	0.02%		24,297,470	-25.2%	R20,544,203,202	-4.4%	11.7
EASTERN CAPE	55,019	-19.0%	2.6%	622,139	-29.2%	R1,181,847,960	19.2%	11.0
NMB	42,915	-13.4%	2.1%/78.0%	59,876	-40.9%	R81,523,249	45.9%	1.4

2024: NMB 19,695 passengers / Arriving 11,092 / Departing 8,567 - **Down 1.2%**
2023: NMB 19,939 passengers / Arriving 11,128 / Departing 8,811

2024: Main Purpose: **EC:** Holiday 45.6%, VFR 35.6%, Business 7.7%
2023: Main Purpose: **EC:** Holiday 48.6%, VFR 36.4%, Business 6.2%

Source: NMBT Baseline Methodology

FOREIGN TOURISM
QUARTER 3 - 2024

INTERNATIONAL ARRIVALS EC

ZIMBABWE	7350	12.95%
USA	6603	11.64%
UK	6178	10.89%
GERMANY	4043	7.12%
NETHERLANDS	3935	6.93%
FRANCE	2329	4.10%
ITALY	2239	3.95%
AUSTRALIA	2020	3.56%
BOTSWANA	1589	2.80%
BELGIUM	1446	2.55%

INTERNATIONAL ARRIVALS CDSI

UK	1699	15.3%
GERMANY	1500	13.5%
USA	811	7.3%
NETHERLANDS	482	4.3%
AUSTRALIA	392	3.5%
KENYA	355	3.2%
SWITZERLAND	299	2.7%
ITALY	288	2.6%
ZIMBABWE	286	2.6%
PHILIPPINES	279	2.5%

Source: SAT and ACSA

DOMESTIC TOURISM
QUARTER 3 - 2024

REGION	OVERNIGHT TRIPS		SHARE SA/EC	BEDNIGHTS		SPEND			LENGTH OF STAY
South Africa	11,522,814	27.8%		39,154,389	18.8%	R	33,333,651,892	10.1%	3.4
Eastern Cape	1,313,342	-5.4%	11.4%	6,279,510	26.0%	R	4,848,026,272	-7.0%	4.8
NMB	355,097	-3.8%	3.1%/27.0%	1,119,071	-6.9%	R	1,310,791,494	-5.4%	3.2

2024: NMB 334,293 passengers / Arriving 167,050 / Departing 167,243 - **Up 8.6%**
2023: NMB 307,935 passengers / Arriving 153,594 / Departing 154,341

2024: Main Purpose: **EC:** VFR 55.0%, Business 23.2%, Holiday 17.2%,
2023: Main Purpose: **EC:** VFR 55.5%, Holiday 32.7%, Business 3.0%

2024: EC Day Trips: 1,640,842, 5% share of SA, **Down 25%**

Source: NMBT Baseline Methodology

TOURISM PERFORMANCE DECEMBER 2024

SOURCE *	BEDNIGHTS SOLD	VISITING FRIENDS AND RELATIVES BEDNIGHTS	VISITOR DAYS	SPEND
Foreign	16,667	9,718	26,385	R30,747,442
Domestic	210,963	389,626	600,589	R490,820,574
Total 2024	**227,631**	**399,344**	**626,974**	**R521,568,016**
Total 2023	252,493	280,428	532,920	**R440,276,387**
Growth	**-24,862 (-9.8%)**	**+118 916 (42.4%)**	**+94 055 (17.6%)**	**+ R81 291 629 (18.5%)**

** Excluding Day Visitors*

2024: 46 Cruise Liners / R155 Million Revenue / 66,894 Passengers (mostly Foreign)
2023: 34 Cruise Liners / R75 Million Revenue / 50,000 Passengers

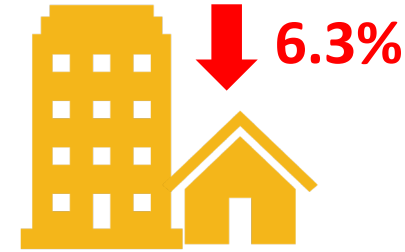
2024: 151 074 passengers / Arriving 80 339 / Departing 70 735 - **Up 4.2%**
2023: 145 017 passengers / Arriving 77 192 / Departing 67 825

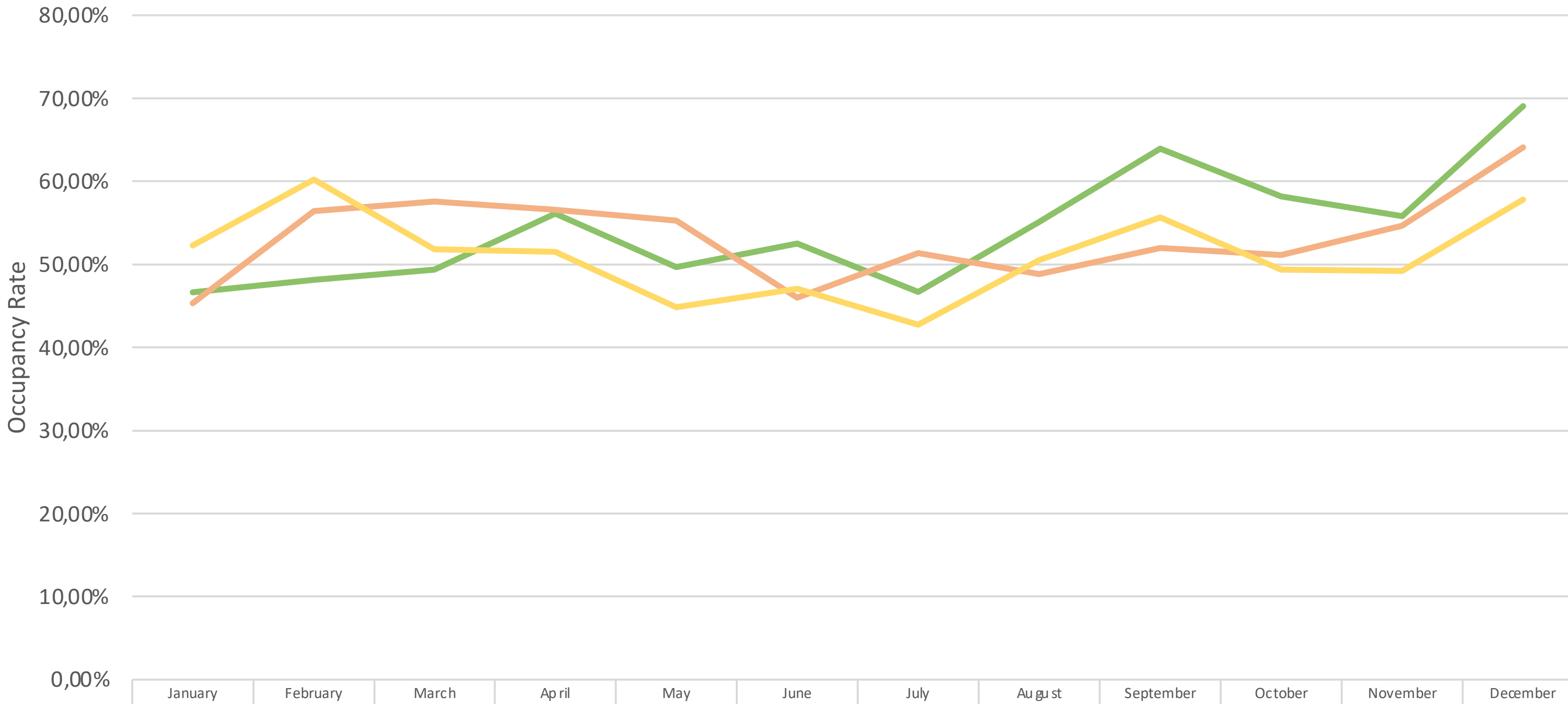
Key Out Take: Overall season performance was up but decline in bednights sold can be attributed to economic reasons – higher cost of living. Leisure visitors seem to prefer cheaper alternatives such as AirBnB and Staying with Friends and Relatives.

Source: NMBT Baseline Methodology

nelson mandela bay MUNICIPALITY

ACCOMMODATION (FORMAL OCCUPANCY)





	January	February	March	April	May	June	July	August	September	October	November	December
2019	46,64%	48,16%	49,36%	56,14%	49,70%	52,48%	46,66%	55,11%	63,95%	58,15%	55,78%	69,06%
2023	45,32%	56,40%	57,57%	56,55%	55,25%	46,02%	51,36%	48,83%	51,96%	51,14%	54,65%	64,09%
2024	52,25%	60,21%	51,79%	51,51%	44,81%	47,04%	42,74%	50,52%	55,65%	49,36%	49,22%	57,78%

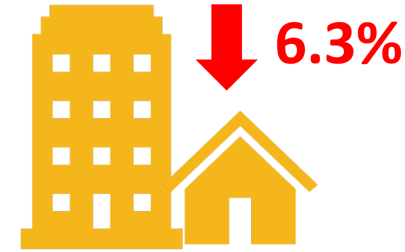
Key Out Take: Across the entire year of 2024, there is a decline in occupancy rates compared to 2023 reflecting the current cost of living / economic climate affecting travel bookings specifically to traditional / more expensive accommodation.

Source: NMBT Occupancy Surveys

nelson mandela bay MUNICIPALITY

Public

ACCOMMODATION (FORMAL OCCUPANCY)



- **Occupancy Rate:** The overall average occupancy rate across all accommodation types was 57.78%, a decrease of 6.31% from the previous year.

- **Occupancy Peaks:** Occupancy was much higher towards the last week of December, rising between Christmas and reaching its peak on New Years Eve.

- **Average Bed Rate:** The average bed rate in December 2024 was R 754.68, reflecting a slight decrease of R 76.71 compared to 2023.

- **Total Income:** Total income generated from all types of FORMAL accommodation was R171,788,289, showing a decrease of R 38,132,614 from the previous year.

- **Foreign vs. Domestic Guests:** Domestic guests remained the dominant market segment, making up 92.68% of total guests, with foreign guests at 7.32%.

Source: NMBT Occupancy Surveys

NMB OCCUPANCIES

	Facilities NMB	Beds Available per night	Beds Sold per month	Ave Occupancy	Average Bed Rate	Total Income generated
Hotel	27	3965	71426	58.11%	R 1,153.12	R 82,362,363
Self-Catering	91	3293	65241	63.91%	R 454.86	R 29,675,561
B&B	81	1202	18053	48.45%	R 682.35	R 12,318,786
Guest House	160	2466	35417	46.33%	R 872.23	R 30,892,030
Budget	17	1782	37493	67.87%	R 441.14	R 16,539,550
TOTAL	376	12708	227631	57.78%	R 754.68	R 171,788,289
Difference	0	0	-24 862	-6.31%	-R 76.71	R -38,132,614

Key Out Take: Budget and Self-Catering occupancies was higher compared to the other sectors, further highlighting the market looking at more affordable options for leisure holiday. More business travel and national/international events can boost the sector especially during the beginning of December where demand is lower currently.

Source: NMBT Occupancy Surveys

HOTEL OCCUPANCIES

	2024	2023	GROWTH
SOUTH AFRICA+	61.2	62.4	**-1.2**
INLAND PROVINCES			**UP**
FREE STATE+	55.6	50.8	**4.8**
LIMPOPO+	63.4	59.7	**3.7**
NORTH WEST+	76.1	73.6	**2.5**
MPUMALANGA+	45.4	50.9	**-5.5**
GAUTENG+	52.2	51.9	**0.3**
JOHANNESBURG+	41.9	39.1	**2.8**
COASTAL PROVINCES			**DOWN**
EASTERN CAPE+	61.8	62.6	**-0.8**
NELSON MANDELA BAY	59.1	65.6	**-6.6**
KWAZULU NATAL+	66.8	69.2	**-2.5**
DURBAN+	65.8	67.0	**-1.2**
WESTERN CAPE+	69.5	73.4	**-3.9**
CAPE TOWN+	69.7	73.9	**-4.2**
GARDEN ROUTE+	72.4	72.4	0.0

Key Out Take: Although the coastal regions outperform the inland regions, the national decline was mainly driven by the decline of the coastal provinces of around 3.3%. The performance variation can be attributed to several factors, including regional disparities in infrastructure, marketing efforts, the economic climate and an increase in VFR travel.

Source: STR Report

OCCUPANCY

Revenue	Average Daily Rate	RevPAR
27M	1,292	813
↑ 6.7% vs December '23	↓ 6.5% vs December '23	↓ 9.7% vs December '23

Available Listings	Booked Listings	Occupancy Rate
1,515	1,488	63%
↑ 18.1% vs December '23	↑ 18.3% vs December '23	↓ 3.4% vs December '23

	Occupancy	Growth	Revenue	Growth	Rooms Sold	Growth
South Africa	**64.49%**	**0.6%**	**2,376,612,992**	**12.4%**	**2,056,567**	**15.9%**
Western Cape	**71.13%**	**0.1%**	**1,546,357,399**	**12.4%**	**1,107,340**	**15.0%**
Cape Town	71.28%	-0.8%	878,031,245	14.5%	532,998	15.3%
Knysna	73.01%	0.6%	69,691,608	-6.3%	54,772	9.6%
KwaZulu-Natal	**67.17%**	**2.0%**	**336,535,250**	**10.6%**	**353,812**	**16.8%**
Durban	65.21%	1.6%	11,285,516	14.2%	10,603	12.4%
Eastern Cape	**64.38%**	**-0.3%**	**127,421,780**	**-0.8%**	**158,239**	**10.6%**
Nelson Mandela Bay	62.95%	-3.4%	26,709,001	6.7%	37,196	10.8%
Kouga	74.03%	0.7%	48,003,433	-5.4%	46,430	11.0%
Buffalo City	61.14%	2.8%	13,009,455	13.9%	20,511	19.3%

Key Out Take: Although the occupancy rates and Revenue Per Available Room declined, there was a marked increase in supply and booked listings/room nights sold which contributed to an increase in Revenue. This sectors performance coupled with an increase in the VFR market could explain the decline experienced by the formal accommodation sector.

Source: AirDnA Report

VISITOR FEEDBACK SURVEYS

- EDTA conducts monthly visitor surveys
- The surveys include residents
- Some of the results showed varied responses for example in terms of cleanliness there were respondents that enjoyed the clean beaches while others felt that there was more that needed to be done.
- Overall visitors seemed to have a more positive perception of the destination
- Some of these feedback is also driven by perceptions
- By addressing all of these identified issues, whether they are just perceptions or not, the destination’s attractiveness would improve.

VISITOR FEEDBACK ENJOYED

nelson mandela bay MUNICIPALITY

Public

VISITOR FEEDBACK ENJOYED

- **Beaches & Coastal Activities:** Many respondents mentioned enjoying the wide variety of beaches (e.g., Hobie Beach, Summerstrand), beach walks, and beach activities. Terms like "beaches," "beach vibes," "clean beaches," and "beachfront" were repeated numerous times.

- **Friendly People & Atmosphere:** The friendliness of locals is a consistent highlight ("friendly people," "friendly vibes," "warm people"). The general "vibe" of the city, including its peaceful and welcoming environment, was appreciated.

- **Events & Entertainment:** Several references were made to entertainment options, including festivals (e.g., Ebubeleni Music Festival), sports events, fireworks, and general public celebrations ("events," "entertainment," "festivals"). "Music" and "vibrant atmosphere" were also prominent.

- **Nature & Wildlife:** Nature reserves and wildlife experiences, especially at Addo Elephant Park and other game parks, stood out ("wildlife," "game drive," "Addo Elephant Park"). "Natural beauty" and "scenery" were also commonly noted.

VISITOR FEEDBACK ENJOYED

- **Shopping & Dining:** Respondents appreciated the shopping malls, restaurants, and food markets ("shopping," "restaurants," "food").
- **Weather & Scenery:** The favourable weather and beautiful scenery were frequently mentioned ("weather," "scenery," "ocean view").
- **Cultural and Historical Attractions:** Locations like the Donkin / Route 67 and references to the city's culture and history were also highlighted.

VISITOR FEEDBACK DISLIKED

VISITOR FEEDBACK DISLIKED

- **Crime & Safety Concerns:** A significant number of respondents expressed concerns about crime levels, especially on beaches and in public areas ("crime," "safety," "police visibility," "crime prevention"). Calls for more police presence and security measures at events, beaches, and in the city were frequent.

- **Cleanliness & Maintenance Issues:** The cleanliness of the city, particularly around beaches and public spaces, was a major concern ("cleanliness," "litter," "beachfront cleanliness," "dirty buildings"). Respondents mentioned the need for more frequent cleaning, better waste management, and improved maintenance of public areas and infrastructure.

- **Infrastructure & Roads:** Poor infrastructure, particularly potholes, road maintenance, and broken streetlights, were common complaints ("potholes," "roads," "infrastructure," "streetlights"). Several respondents mentioned the need for renovation of old or abandoned buildings.

- **Traffic & Parking Issues:** Traffic congestion, especially during peak periods, and limited parking at malls were frequently noted ("traffic," "traffic lights," "parking," "congestion"). Issues with traffic management and road safety, particularly during festivals, were highlighted.

VISITOR FEEDBACK DISLIKED

- **Beach Facilities & Regulations:** Concerns about the condition of beach facilities, including toilets and showers, as well as alcohol-related issues, were mentioned ("toilets," "beach facilities," "alcohol abuse," "drinking on beaches"). Calls for better regulation of public spaces and more facilities for beachgoers were made.

- **Lack of Family-Oriented Activities:** Many respondents expressed a desire for more family-friendly activities, particularly for children and the underprivileged ("family-oriented activities," "children's activities," "family events").

- **Event Organization & Entertainment:** Some dissatisfaction with event organization, particularly regarding the lineup of artists and availability of food stalls, was voiced ("event organization," "lack of entertainment," "food trucks," "artist lineup"). Calls for more diverse and engaging events were also noted including the late marketing of events.

- **Public Services & Governance:** Several respondents expressed frustration with the state of public services and local governance, including concerns over the cleanliness of the city and the effectiveness of the municipality ("service delivery," "government," "cleaning services").

RECOMMENDATIONS

- Establish relevant Research / Stats committees
- Establish and Implement Research Agenda
- Establish and Implement a Tourism Statistics Framework – Methodology
- Collaborate and partner with Industry and Academics

THANK YOU