



nelson mandela bay
T O U R I S M
PORT ELIZABETH | UITENHAGE | DESPATCH

Nelson Mandela Bay Tourism Impact Assessment

**Summer Holiday Season
December 2010 and January 2011**

Nelson Mandela Bay Tourism Impact Assessment

December 2010 and January 2011 Summer Holiday Season

1. Introduction

In the past various methods have been used to count the number of tourists visiting different destinations as they travel through a country. However, it is now widely accepted that headcounts are virtually impossible to estimate unless accurate local data is collected from accommodation providers. More than 70% of domestic tourists stay in private homes mainly visiting friends and relatives. Foreign arrivals are counted accurately when they arrive in a country for immigration and customs purposes mainly because every overseas passenger has to complete an arrival form. However, once the foreign arrivals start traveling within a country their movements are difficult to trace.

For security purposes information about passengers traveling on domestic flights cannot be released and therefore there is no way of separating foreign tourists from domestic travelers. It is only those provinces with international airports that can measure foreign arrivals but only if the overseas tourists fly direct from overseas destination to South African destination. Taking all of the above into consideration it is now widely accepted that the only true measurement of tourism growth is the number of bed nights spent in a country and within its different destinations. Generally, growth can be measured at airports to determine if domestic arrivals and departures have increased. Also growth in tourism facilities can be measured every time a new hotel is built and other accommodation establishments open up for business.

SA Tourism has discontinued providing information on the distribution of foreign tourists to the major cities in each province in the quarterly reports. Hence there is no current secondary data available on the number of foreign tourists visiting cities in the Eastern Cape Province. The table on the next page is an indication of distribution. Based on the SA Tourism Quarterly Reports in 2003 and 2004, before they were discontinued, it is assumed that approximately 70% of all foreign tourists visiting the Eastern Cape Province will visit Port Elizabeth, 25% will visit East London and about 5% will visit Mthatha. This positions Nelson Mandela Bay as the premier destination for foreign tourists in the Eastern Cape.

Cities Visited in the Eastern Cape Province by Foreign Tourists 2003 and 2004

Cities visited in the EC province	Q1 2003	Q2 2003	Q3 2003	Q4 2003
Port Elizabeth	78.2%	73.0%	81.9%	78.0%
East London	22.9%	26.3%	25.1%	17.6%
Mthatha	3.9%	5.7%	3.8%	5.3%
	Q1 2004	Q2 2004	Q3 2004	Q4 2004
Port Elizabeth	79.8%	69.4%	82.4%	87.5%
East London	23.5%	23.6%	26.8%	20.1%
Mthatha	7.9%	4.7%	5.0%	5.1%

(Source: SA Tourism Quarterly Reports Eastern Cape 2003 and 2004)

2. International visitors to Nelson Mandela Bay

Because very little local data is collected from product owners and no information is available on cities and towns in published statistics, it is only possible to estimate the number of international visitor arrivals to NMB. In the 2003 Buffalo City Tourism Master Plan it was estimated that NMB received 390,000 foreign arrivals.

The Monitor Study estimated that 400,702 foreign tourists visited NMB in 2003. The average spend per foreign tourist was estimated at R3159. They used this figure as a baseline to calculate the value i.e. $400,702 \times R3159 = R1.27$ billion total value of foreign tourism to NMB. The foreign tourism projections for the NMBM developed by Kaiser and Associates as part of the Strategic Spatial and Implementation Framework (SSIF) projected that NMB should host about 530,751 foreign tourists in 2009.

According to the SA Annual Tourism Report for 2009, nearly 10 million foreign tourists spent a total of 71 million bed nights in South Africa. This equates to 7.1 million bed nights per arrival. Just over 3 million of these bed nights (4.3%) were spent in the Eastern Cape which equates to about 422,535 foreign arrivals. If 75% of these arrivals visited Port Elizabeth then this would equate to 316,901 foreign arrivals.

The tourism impact assessment for the December 2010/January 2011 peak holiday season is therefore based on ratios, formulae and other methodology to arrive at a reasonable estimate in the absence of any reliable local data. The rationale for the calculations is explained in the commentary. It is recommended that a more comprehensive study is undertaken to develop a baseline for all future projections.

SA ANNUAL TOURISM REPORTS SUMMARY OF RESULTS 2008 – 2009				
SOUTH AFRICA	2008	%	2009	%
Foreign Tourists				
Total Foreign Arrivals	9,591,828	100%	9,933,966	100%
Overseas Arrivals	2,136,344	22%	2,050,699	21%
Arrivals from Africa	7,455,484	78%	7,883,267	79%
Domestic Tourists				
Number of Trips	33 million		30 million	
Number of Tourists	14 million		15 million	
EASTERN CAPE				
Foreign Tourists				
Total Foreign Arrivals	498,775	5.2%	427,160	4.3%
Overseas Arrivals	493,787	99.0%	418,310	99.0%
Arrivals from Africa	4,988	1.0%	4,225	1.0%
Average Length of Stay	10 nights		8.9 nights	
Domestic Tourists				
Number of Trips	5.4 million		5.7 million	
Number of Tourists	2.3 million		2.9 million	
Number of Bed Nights	26.4 million		25.7 million	
Average Nights/Trip	5.0 nights		4.5 nights	

(Source: SA Annual Tourism Reports 2008 and 2009)

Commentary:

- The number of foreign arrivals that visited the Eastern Cape is based on a percentage of bed nights spent in the province.
- The Eastern Cape receives on average between 4% and 5% of the foreign arrivals to South Africa.
- On average only about 1% of foreign arrivals that visit the Eastern Cape are from Africa.
- Domestic tourists made 5.7 million trips to the Eastern Cape in 2009 amounting to 25.7 million bed nights spent in the Eastern Cape.

3. Domestic visitors to Nelson Mandela Bay

It is virtually impossible to count how many domestic tourists visit a destination mainly because over 70% stay in private accommodation with friends and relatives. From their market research, the Monitor Group concluded that the NMB captures approximately 25% of all domestic tourism trips taken in the Eastern Cape. This means that there were approximately 1,870,645 million domestic trips taken in the NMB metropolitan city area during 2003 (25% of 7,482,579 taken in the Eastern Cape). An estimated 76% (1,421,690) of these trips were taken by intra-provincial travelers i.e. residents of the Eastern Cape. The Monitor Study estimated that about 1.9 million domestic trips were taken to NMB in 2003 and that the total value of domestic tourism to NMB was calculated at R1.65 billion. The domestic tourism projections for the NMBM developed by Kaiser and Associates as part of the Strategic Spatial and Implementation Framework (SSIF) projected that NMB would host about 2.4 million domestic tourists in 2009.

Domestic Tourism (Inter) and (Intra) Provincial Distribution 2007 – 2009									
Province	Total Trips 2007	% Inter 2007	% Intra 2007	Total Trips 2008	% Inter 2008	% Intra 2008	Total Trips 2009	% Inter 2009	% Intra 2009
KwaZulu-Natal	10.4m	17%	83%	10.4m	14%	86%	8.8m	12%	88%
Eastern Cape	6.2m	30%	70%	5.4m	24%	76%	5.7m	22%	78%
Gauteng	5.1m	77%	23%	4.8m	79%	21%	5.0m	68%	32%
Western Cape	4.5m	27%	73%	4.1m	22%	78%	3.5m	34%	66%
Limpopo	2.7m	42%	58%	2.4m	44%	56%	1.9m	47%	53%
Mpumalanga	2.2m	45%	55%	2.2m	43%	57%	1.7m	38%	62%
Free State	2.2m	34%	66%	1.5m	53%	47%	1.7m	54%	46%
North West	2.0m	61%	39%	1.3m	84%	16%	1.4m	70%	30%
Northern Cape	0.6m	45%	55%	0.9m	35%	65%	0.6m	35%	65%

(Source: SA Tourism Domestic Surveys for 2007 – 2009)

Inter-provincial is travel between provinces and intra-provincial is travel within the province by local residents. The main domestic tourism source markets for the Eastern Cape are: Gauteng, KwaZulu-Natal and Western Cape. The total domestic tourism trips to the Eastern Cape increased from 5.4 million in 2008 to 5.7 million in 2009. This increase of 300,000 trips generated an additional R1.2 billion in total domestic tourism spend.

Total Domestic Tourism Spend into each Province 2001 - 2009					
	2001	2005	2007	2008	2009
KwaZulu-Natal	R3.1bn	R5.7bn	R4.9bn	R7.8bn	R6.4bn
Western Cape	R2.1bn	R2.8bn	R3.6bn	R3.9bn	R2.6bn
Gauteng	R3.2bn	R5.0bn	R3.0bn	R3.6bn	R3.4bn
Eastern Cape	R2.1bn	R2.3bn	R3.0bn	R3.1bn	R4.3bn
Mpumalanga	R0.9bn	R1.2bn	R1.7bn	R2.6bn	R1.5bn
Limpopo	R2.1bn	R1.2bn	R1.6bn	R2.2bn	R1.2bn
Free State	R1.1bn	R1.1bn	R1.0bn	R1.4bn	R1.4bn
North West	R1.3bn	R1.6bn	R0.7bn	R1.0bn	R1.1bn
Northern Cape	R0.4bn	R0.6bn	R0.5bn	R0.9bn	R0.5bn

(Source: Compiled by Tournet Africa from analysis of SA Annual Tourism Report 2009)

The Eastern Cape was the second biggest earner from domestic tourism in 2009. According to the SA domestic tourism survey, some 1.3 million inter-regional domestic tourism trips were made to the Eastern Cape from the other provinces in 2009 of which 4.4 million trips were intra-regional. Based on the most recent information, and assuming that NMB received 25% of the domestic tourism trips to the province, the indications are that NMB probably received about 1.4 million trips of the 5.7 million domestic tourism trips to the Eastern Cape in 2009.

Average Spend Per Trip by Purpose 2006 - 2009				
Purpose	Average Spend per Trip by Purpose 2006	Average Spend per Trip by Purpose 2007	Average Spend per Trip by Purpose 2008	Average Spend per Trip by Purpose 2009
VFR	R 375	R 360	R 480	R 560
Holiday	R1,092	R1,240	R1,910	R1,330
Religious	R 381	R 240	R 400	R 280
Business	R 759	R1,050	R1,640	R2,340
Medical	R 471	R 160	R 760	R 450

(SAT Domestic Surveys for 2006 – 2009)

Average Spend Per Day by Purpose 2006 - 2009				
Purpose	Average Spend per Day by Purpose 2006	Average Spend per Day by Purpose 2007	Average Spend per Day by Purpose 2008	Average Spend per Day by Purpose 2009
VFR	R 94	R 80	R110	R130
Holiday	R143	R260	R370	R290
Religious	R125	R 80	R140	R110
Business	R190	R230	R220	R490
Medical	R 95	R 50	R120	R 90

(SAT Domestic Surveys for 2006 - 2009)

The average spend per domestic tourist trip in 2009 was R740. Therefore, the value of domestic tourism trips to NMB in 2009 is estimated at R1.04 billion. This is calculated at 1.4 million trips x R740 per trip = R1.04 billion. There is currently no information available for 2010.

4. Potentiality Review

Figures indicate that Nelson Mandela Bay's tourism potential is in excess of 1.4 million domestic tourism trips and 350,000 foreign tourist arrivals by 2011 taking into consideration the expected impact of the 2010 FIFA World Cup.

Visitor type	2009	2010	2011
Foreign tourists	299,250	329,175	362,093
Domestic tourism trips	1,350,000	1,417,500	1,488,375

Nelson Mandela Bay is an 'iconic' visitor destination in South Africa by virtue of its name and heritage links with major supply markets such as the United Kingdom, Germany, Netherlands and Portugal. Despite this, NMB must never rest on its current market position and past successes. NMB must continue to aggressively market itself to an ever increasing and more discerning market.

**Statistics SA Tourist Accommodation Statistical Release P6410
Average Stay Unit Statistics Dec/Jan Summer Holiday Season**

	Dec 2007	Jan 2008	Dec 2008	Jan 2009	Dec 2009	Jan 2010
Hotels						
Occupancy rate	56.6%	54.9%	53.9%	49.0%	48.7%	43.7%
Average income	R672	R672	R729	R810	R826	R814
Caravan Parks & Camping sites						
Occupancy rate	33.7%	13.4%	21.1%	9.9%	25.8%	9.3%
Average income	R363	R367	R408	R205	R269	R132
Guest Houses & Guest Farms						
Occupancy rate	57.6%	44.9%	53.1%	67.8%	54.7%	51.7%
Average income	R611	R611	R689	R375	R327	R349
Other Accommodation						
Occupancy rate	46.6%	42.0%	55.4%	46.0%	63.4%	47.5%
Average income	R419	R426	R482	R520	R514	R524

(Comparative tables compiled by Tournet Africa from Stats SA monthly releases)

Commentary:

- Stay unit is a Stats SA definition which refers to the unit of accommodation that is available to be charged out to guests e.g. a powered site in a caravan park or a room in a hotel.
- There are no published releases for the provinces. Provinces have to collect their own accommodation statistics.
- Average income is the average income per stay unit nights sold e.g. hotel room nights sold.
- The problem with the above statistics is that room night data is not comparable with bed night data which is the performance measurement used by SA Tourism in all their reports. Furthermore, the tourism satellite calculations are based on bed night data.
- The Stats SA data is still useful because it does provide a benchmark for measuring local data and it does provide an indication of how the different accommodation categories are performing month on month and year on year.

GROWTH IN NMB TOURIST ACCOMMODATION FACILITIES 2006 – 2010			
Accommodation Type	Number of Facilities 2006	Number of Facilities 2009	Number of Facilities 2010
Hotels	29	29	33
B&B / Guest Houses	141	232	249
Self-Catering	52	96	104
Backpackers	8	10	14
Camping & Caravan	6	5	5
TOTAL	236	372	405

(Source: Nelson Mandela Bay Tourism)

GROWTH IN NMB AVAILABLE ROOMS FOR TOURISTS 2006 – 2010			
Accommodation Type	Number of Rooms 2006	Number of Rooms 2009	Number of Rooms 2010
Hotels	1688	1876	2196
B&B / Guest Houses	910	1540	1659
Self-Catering	476	1477	1536
Backpackers	99	127	175
Camping & Caravan	150	334	334
TOTAL	3323	5354	5900

(Source: Nelson Mandela Bay Tourism)

GROWTH IN NMB AVAILABLE BEDS FOR TOURISTS 2006 – 2010			
Accommodation Type	Number of Beds 2006	Number of Beds 2009	Number of Beds 2010
Hotels	3923	4938	5629
B&B / Guest Houses	2019	3407	3683
Self-Catering	1563	3834	3959
Backpackers	255	478	757
Camping & Caravan	631	1448	1448
TOTAL	8391	14105	15476

(Source: Nelson Mandela Bay Tourism)

NEW HOTELS LAUNCHED IN NMB DURING 2010		
Name of Hotel	Number of Rooms	Number of Beds
The Dondi Lodge	18	20
Town Lodge	203	406
Road Lodge Airport	90	120
Total	311	546

(Source: Tournet Africa survey January 2011)

The tables on the previous page represent accommodation audits undertaken in 2006, 2009 and 2010. Accommodation in universities and other institutions which are not included in SA Tourism statistics have been excluded in the calculations. From the above comparison it would appear that the supply of accommodation facilities in Nelson Mandela Bay has increased by 72% over the four year period between 2006 and 2010 thereby increasing the stock of available beds for visitors by 84% or 7085 additional beds. Some hotels during this period added more rooms.

Growth in hotel accommodation is usually a function of economic activity mainly because approximately 75% of hotel occupancy is directly related to business travel. However, with new hotels such as the five-star Radisson Blu, Port Elizabeth has substantially improved the prospects of attracting more foreign overnight guests. In this regard, and coupled with the new Boardwalk state-of-the-art conference centre, Nelson Mandela Bay should anticipate an increase in bed nights spent in the metropolitan city during 2010 and 2011. Growth in alternative accommodation establishments is in line with the global trend and increasing demand for more affordable or exclusive accommodation especially with respect to the independent traveler. Many business travelers also prefer 'home away from home' accommodation and often adopt a particular establishment if they feel comfortable and welcome in such establishments. At peak periods a shortage of satisfactory accommodation may be experienced; in other periods sufficient accommodation is available. Hotel occupancies usually drop during the December/January holiday period mainly because of a decline in business travel as many businesses close over this period.

Events hosted in NMB during this period usually assist in maintaining acceptable occupancy levels. Generally, NMB can offer a good selection of accommodation for most market segments. Ensuring standards are maintained in the accommodation sector is also considered a critical development issue.

5. Tourism Impact Assessment Baseline Model

The table below illustrates the baseline calculation model for measuring the impact of tourism on Nelson Mandela Bay. The ADR (average daily rate) figures in the table below are a combination of national averages included in the Stats SA tourist accommodation data and NMBT data where there are no national statistics available e.g. self catering and backpacker accommodation.

6. Work in Progress

The table below using the tourism impact assessment model provides a preliminary estimate of the value of tourism to Nelson Mandela Bay. However, a methodology still has to be developed for calculating the revenue spent by domestic tourists visiting friends and relatives (VFR) staying in unpaid accommodation (private homes).

NMB TOURISM IMPACT ASSESSMENT BASELINE MODEL CALCULATION NMBT ACCOMMODATION STATISTICS AND SA AVERAGE STAY UNIT STATISTICS PRELIMINARY ASSESSMENT 2010					
Facility	No of Beds A	ADR B	Occupancy C	Bed Nights D	Revenue B x D
Hotels	5 629	R964	51%	1,047,838	R1 012 million
B&B/Guesthouses	3 683	R380	50%	672,148	R 255 million
Self-Catering	3 959	R475	68%	982,624	R 467 million
Backpackers	757	R115	47%	129,863	R 15 million
Camping/Caravan	1 448	R136	16%	84,563	R 12 million
TOTAL	15 476			2,917,036	R1 761 million

(Source: NMBT Accommodation Statistics and Stats SA Tourist Accommodation Release P6410)

The baseline model is based on 365 days occupation multiplied by the assessed number of bed nights sold (number of available beds x average occupancies) multiplied by the average daily rate. The figures calculated in the baseline model indicate that the value of direct spend by tourists in Nelson Mandela Bay was R1.8 billion in 2010.

The tourism satellite account multiplier can only be applied to total foreign direct spend (TFDS) and at this stage of developing a baseline model for Nelson Mandela Bay, bed nights spent by foreign tourists in the different categories of accommodation cannot be separated from bed nights spent by domestic tourists staying in the same accommodation.

7. Baseline Calculation for Dec/Jan 2010 and Dec/Jan 2011 Tourism Impact Assessment (Bed Nights)

NMB TOURISM IMPACT ASSESSMENT BASELINE CALCULATION NMBT ACCOMMODATION STATISTICS AND SA AVERAGE STAY UNIT STATISTICS December 2009 and January 2010 at national average stay unit occupancies					
Facility	No of Beds A	ADR B	Occupancy C	Bed Nights D	Revenue B x D
Hotels	4 938	R733	46%	136,289	R100 million
B&B/Guesthouses	3 407	R338	53%	108,343	R 37 million
Self-Catering	3 834	R475	68%	156,427	R 74 million
Backpackers	478	R115	70%	20,076	R 2 million
Camping/Caravan	1 448	R200	18%	15,638	R 3 million
TOTAL	14 105			436,773	R216 million

(Source: NMBT Accommodation Statistics and Stats SA Tourist Accommodation Release P6410)

The calculation in the table above is based on 60 days occupation over the December/January peak summer holiday season. Some 436,773 bed nights were sold in the December/January 2010 holiday season which generated R216 million in tourist revenue. The R216 million does not include revenue spent by domestic tourists staying with friends and relatives in private homes. Although visiting friends and relatives do not pay for accommodation they do spend money on food, entertainment and gifts. A methodology for this calculation still has to be developed.

**NMB TOURISM IMPACT ASSESSMENT BASELINE CALCULATION
NMBT ACCOMMODATION STATISTICS AND SA AVERAGE STAY UNIT STATISTICS
December 2010 and January 2011 at national average stay unit occupancies**

Facility	No of Beds A	ADR B	Occupancy C	Bed Nights D	Revenue B x D
Hotels	5 629	R964	51%	172,247	R166 million
B&B/Guesthouses	3 683	R380	50%	110,490	R 42 million
Self-Catering	3 959	R475	68%	161,527	R 77 million
Backpackers	757	R115	70%	31,794	R 4 million
Camping/Caravan	1 448	R136	16%	13,901	R 2 million
TOTAL	15 476			489,959	R291 million

(Source: NMBT Accommodation Statistics and Stats SA Tourist Accommodation Release P6410)

8. Summary and Conclusion

It must be stated that a tourism impact assessment with limited local data is a difficult task. It is possible to obtain accommodation rates by contacting the accommodation provider receptionists but almost impossible to obtain occupancy rates without the full cooperation of the owners and managers. This leaves no option but to use national averages in some cases for the calculations where such information is available. NMBT is to be commended for attempting to develop a local database but at this stage the sample needs to be increased substantially for reliability and accuracy.

At the time of writing, the November and December 2010, and January 2011 monthly tourist accommodation statistics have not been released by Statistics SA. For the purpose of completing the tourism impact assessment by 31st January 2011, averages for the 10 month period January to October 2010 were used for the calculations. Once these missing releases are available for analysis then the assessment for the Dec/Jan 2011 season will be revised and adjusted.

The tourism impact assessment included hotel accommodation, bed & breakfast establishments, guest houses, self-catering apartments, backpacker lodges and camping/caravan sites.

Although there appears to be very little increase in the overall occupancy levels at a national and local level for the year 2010, nevertheless growth in the tourism facilities appears to have generated additional tourist revenue in Nelson Mandela Bay as indicated in the assessment. It would appear that the 2010 FIFA World Cup boosted occupancies over the June/July 2010 period of the event mainly due to the increase in foreign arrivals. The longer school holiday period boosted domestic tourism as many families decided to take advantage of a combined holiday to attend the SWC matches. A comparison of tourism statistics for the year 2010 must take into consideration that the recession impacted negatively on accommodation occupancies in 2009. Generally, most accommodation providers experienced a decline of -20% in 2009.

The tourism impact assessment for the 60 day summer holiday season, comparing December/January 2010 with December/January 2011, indicates that the cumulative effect of more available beds in 2010 (1371 more beds) and an increase in the average daily rate (ADR), amounted to 53,186 additional bed nights being sold at a higher rate during the 2010/2011 season compared to the 2009/2010 summer holiday season. This growth generated an assessed increase of R75 million in tourist revenue.

9. Bed Nights is the True Measurement of Tourism Performance

The 2.9 million assessed bed nights spent in paid accommodation at Nelson Mandela Bay in 2010 is a combination of domestic and foreign tourists. At this stage of developing a baseline model it is impossible to assess how many bed nights were sold to domestic tourists and how many were sold to foreign tourists.

SA Tourism Quarterly Reports Eastern Cape Provincial Distribution 2009		
Quarter	Bed Nights %	Bed Nights
Q1 2009	4.8%	874,950
Q2 2009	4.2%	687,767
Q3 2009	4.3%	751,475
Q4 2009	4.0%	776,223
	4.3%	3,090,415

(Comparative tables compiled by Tournet Africa from SA Tourism reports)

The above table indicates that foreign tourists spent a total of just over 3 million bed nights in the Eastern Cape in 2009. Figures are not yet available for 2010.

The SA Domestic Tourism Report indicates that domestic tourists made 5.7 million trips to the Eastern Cape in 2009 amounting to 26 million bed nights spent in the province. However, 72% of these bed nights were spent in unpaid accommodation i.e. with friends and relatives.

10. Work in Progress

The table below using the tourism impact assessment baseline model provides a preliminary estimate of the value of tourism to Nelson Mandela Bay.

NMB TOURISM IMPACT ASSESSMENT BASELINE CALCULATION NMBT ACCOMMODATION STATISTICS AND SA AVERAGE STAY UNIT STATISTICS PRELIMINARY ASSESSMENT 2010					
Facility	No of Beds A	ADR B	Occupancy C	Bed Nights D	Revenue B x D
Hotels	5 629	R964	51%	1,047,838	R1 012 million
B&B/Guesthouses	3 683	R380	50%	672,148	R 255 million
Self-Catering	3 959	R475	68%	982,624	R 467 million
Backpackers	757	R115	47%	129,863	R 15 million
Camping/Caravan	1 448	R136	16%	84,563	R 12 million
TOTAL	15 476			2,917,036	R1 761 million

(Source: NMBT Accommodation Statistics and Stats SA Tourist Accommodation Release P6410)

The model above is based on 365 days occupation multiplied by the assessed number of bed nights sold (number of available beds x average occupancies) multiplied by the average daily rate. The figures above indicate that the value of direct spend by tourists in Nelson Mandela Bay was R1.8 billion in 2010. The tourism satellite account multiplier can only be applied to total foreign direct spend (TFDS) and at this stage of developing a model for Nelson Mandela Bay, foreign tourist bed nights cannot be separated from domestic tourist bed nights staying in the different categories of accommodation.