



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

Nelson Mandela Bay Tourism

2014 Annual

Tourism Research Report

Compiled by Erenei Louw

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NMBT Tourism Research Fact Sheet 2014

Nelson Mandela Bay Tourism Baseline	Units	2013	2014
Foreign Visitors (EC)	Pax	276 611	304 888
Foreign Visitors (NMB)	Pax	192 798	230 889
<i>Excluding FIFA WC</i>	<i>Pax</i>	<i>192 798</i>	<i>230 889</i>
Foreign Bednights / Visitor Days	Bednights	632 281	663 204
- Foreign Bednights Paid		407 885	383 183
- Foreign Bednights VFR		224 396	280 020
- Average Bednights per Visitor (All)	Bednights	3.3	2.9
- Average Bednights per Visitor (Paid)	Bednights	2.1	1.7
Foreign Direct spend	Rand	550 084 887	537 195 080
- Average Spend per Visitor per day	Rand	870	810

Domestic Visitor Profile	Pax	7 380 928	7 367 941
Staying in Formal Accommodation	Pax	678 609	590 613
VFR Overnight Visitors	Pax	1 120 729	1 303 048
Day Visitors to NMB	Pax	5 581 590	5 474 280
Domestic Bednights / Visitor Days	Bednights	7 255 303	8 142 743
- Domestic Bednights Paid	Bednights	2 324 096	2 539 635
- Domestic Bednights VFR	Bednights	4 931 208	5 603 108
Domestic Visitor Days	Days	12 836 893	13 617 023
Domestic Direct spend Overnight Visitors	Rand	2 053 276 234	2 674 235 782
- Average Spend per Overnight Visitor	Rand	1 141	1 412
Day Visitor Spend	Rand	2 471 486 850	2 842 209 878
- Average Spend per Day Visitor / Per Day	Rand	443	519
Domestic Direct spend Overall	Rand	4 524 763 084	5 516 445 660

Overall Direct Spend	Rand	5 074 847 971	6 053 640 740
Average Bednight Occupancy %	%	49.27%	52.51%
Tourism GDP SA	Rand Bn	98.9	104.8
Direct Employment SA Tourism	Jobs	654 335	693 595
Tourism GDP per Employee	Rand	151 143	151 143
Job Creation/Sustainability in NMB	Jobs	33 577	40 052

NMBT Tourism Research Fact Sheet 2014 continued...

Nelson Mandela Bay Tourism Baseline		2013	2014
NMB Visitor / Tourist Summary - Visitor No's			
Foreign Visitors Per Annum	Visitor	192 798	230 889
Domestic Visitors Per Annum	Visitor	1 799 338	1 893 661
Vistors / Tourists Per Annum	Visitor	1 992 136	2 124 550
Day trips - From Hinterland	Visitor	5 581 590	5 474 280
Total Visitors / Tourists Per Annum	Visitor	7 573 726	7 598 830

<u>All Tourists / Visitors to NMB:-</u>	<u>Visitor</u>	<u>7 573 726</u>	<u>7 598 830</u>
- Foreign Visitors	Visitor	192 798	230 889
<u>- Domestic Visitors</u>	<u>Visitor</u>	<u>7 380 928</u>	<u>7 367 941</u>
> Overnight	Visitor	1 799 338	1 893 661
> Day Trip	Visitor	5 581 590	5 474 280
<u>Tourist / Visitor Days in NMB:-</u>	<u>Visitor/Day</u>	<u>13 469 175</u>	<u>14 280 227</u>
- Foreign Bednights	Visitor/Day	632 281	663 204
- Domestic Bednights (Paid & VFR)	Visitor/Day	7 255 303	8 142 743
- Day Trips (Visitor Days)	Visitor/Day	5 581 590	5 474 280

Nelson Mandela Bay Tourism Baseline	Units	2013	2014
All Visitors (Foreign & Domestic)	Pax	7 573 726	7 598 830
All Spend	Rand	5 074 847 971	6 053 640 740
<u>All Bednights - Paid For:</u>	<u>Bednights</u>	<u>2 731 981</u>	<u>2 922 819</u>
- Foreign Bednights - Paid	Bednights	407 885	383 183
- Domestic Bednights - Paid	Bednights	2 324 096	2 539 635
Average Bednights / Month	Bednights	227 665	243 568
Average Bednights / Day	Bednights	7 589	8 119
Bednights Available	Bednights	15 190	15 249
Bednight Occupancy %	%	50%	53%

NMBT Tourism Research Report 2014

1. Introduction

Tourism Research reports are not readily available on a city level in South Africa. In order to obtain credible information, Nelson Mandela Bay Tourism, together with Mr. Peter Myles (Tourism Research Specialist, Tournet Africa), have developed a methodology in order to deliver the research information to the tourism industry and stakeholders on a local level.

In order to successfully promote Nelson Mandela Bay as a destination of choice, Nelson Mandela Bay Tourism has identified key information required to make informed decisions. These include:

- Visitor Numbers/Bednights
- Visitor Profiles and Demographics
- Accommodation Occupancies
- Economic Impact of Tourism in Nelson Mandela Bay
- Job creation/sustaining figures
- Economic Impact of Events/Conferences

To obtain the relevant and required information, NMBT has identified and developed the following information sources:

- Accommodation Occupancy Surveys: These captures the number of bednights sold, average rate per person, duration of stay and where visitors are from. These surveys are completed on a monthly basis.
- NMBT Visitor Information Centre Surveys: Captures the date and time, number, method, origin and nature of enquiries to NMBT Visitor Information Centers.
- NMBT Visitor Surveys: Visitors are asked questions in order to provide insights into where they stayed, length of stay, purpose of visit, visitor interest patterns etc.
- Event Impact System: Event and Conference information is collected and then analysed in terms of its economic impact on the city.
- Other Sources of information include SAT Annual Reports and data cuts, TBCSA Business Index, StatSA Tourism Report and the WTTC Report on Tourism in South Africa.

In 2014, Statistics SA made changes to the release of its Tourism & Migration reports and now no longer report on transit arrivals. As a result of this change, the weighting methodology has been revised and the results in the SA Tourism Annual report are now not comparable to reports prior to 2013. This did not have a significant impact on our methodologies as most of our data that is collected for the economic impact assessment is sourced locally.

2. International Visitors

2.1 International Arrivals to SA and EC

	2013	%	2014	%
Total Arrivals to Country	8 961 565		9 549 236	6.56%
		Share		Share
Gauteng	3 712 144	41.42%	3 804 125	39.84%
Western Cape	1 330 520	14.85%	1 386 100	14.52%
Mpumalanga	1 132 444	12.64%	1 144 021	11.98%
Limpopo	1 422 556	15.87%	1 639 766	17.17%
KwaZulu-Natal	772 372	8.62%	768 228	8.04%
Free State	796 706	8.89%	960 147	10.05%
North West	493 197	5.50%	508 537	5.33%
Eastern Cape	276 611	3.09%	304 888	3.19%
Northern Cape	156 588	1.75%	166 657	1.75%

Table 2.1.1 Foreign Arrivals To South Africa and Provincial Share of Foreign Visitors

The number of Foreign visitors to South Africa grew by 6.56% from 8 961 565 in 2013 to 9 549 236 in 2014. On a provincial level the number of visitors grew by more than 10% from 276 611 to 304 888 in 2014 with the Eastern Cape increasing its market share to 3.19% of all arrivals.

The tables below provide a summary of the spend per province, bednights spend in each office, total paid bednights per province, and average length of stay (Source: SA Tourism 2014 Data Cut):

2.2 Foreign Spend per province

Total spend per province	2013		2014	
		Sum		Sum
Gauteng	R	25 594 853 357.79	R	26 101 897 943.17
Western Cape	R	13 139 964 054.40	R	14 486 080 681.01
Eastern Cape	R	1 978 445 560.19	R	2 393 898 765.26
Kwazulu Natal	R	4 356 403 477.85	R	3 795 891 017.60
Mpumalanga	R	5 181 461 932.37	R	4 650 340 194.82
Limpopo	R	9 398 282 833.07	R	9 446 994 097.74
North West	R	1 683 035 849.77	R	1 408 789 059.07
Northern Cape	R	654 314 716.25	R	681 168 427.84
Free State	R	1 949 995 677.33	R	1 206 003 373.55
Total spend in SA excl. Capital	R	63 936 757 459.02	R	64 171 063 560.07

2.3 Foreign bednights per province

Total bednights spend in each province	2013	2014
	Sum	Sum
Gauteng	25 405 424	27 505 360
Western Cape	16 296 340	16 483 252
Eastern Cape	2 690 305	2 795 853
Kwazulu Natal	6 288 556	6 645 153
Mpumalanga	7 606 432	8 483 241
Limpopo	3 732 589	4 483 465
North West	2 839 130	2 660 439
Northern Cape	872 630	885 427
Free State	7 698 163	8 910 529
Total bednights in SA	73 429 569	78 852 721

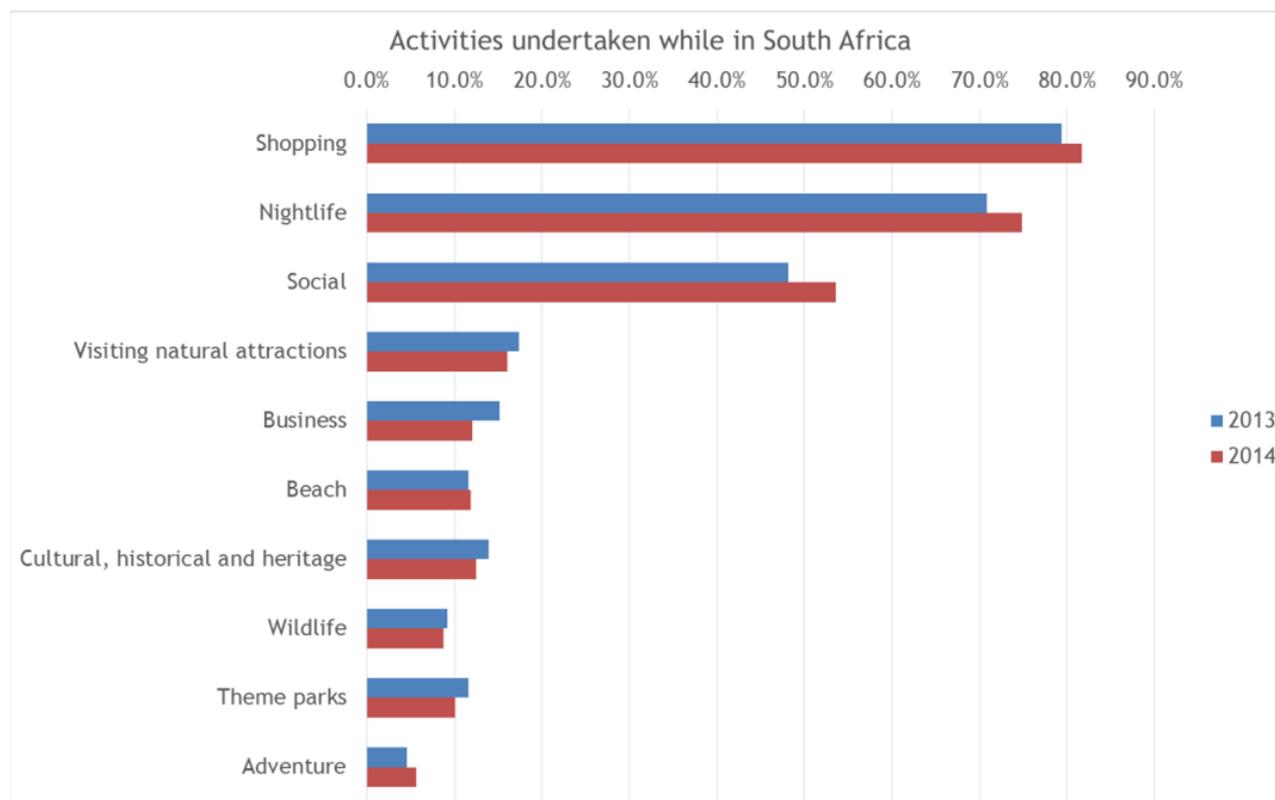
2.4 Total paid foreign bednights in each province

Total paid bednights spend in each province	2013	2014
	Sum	Sum
Gauteng	7 733 288	6 796 797
Western Cape	9 319 411	8 553 820
Eastern Cape	1 583 151	1 615 378
Kwazulu Natal	2 284 728	2 270 669
Mpumalanga	1 859 262	1 961 963
Limpopo	1 234 924	1 317 270
North West	527 109	471 522
Northern Cape	307 899	247 780
Free State	285 312	409 863
Total paid bednights in SA	25 135 085	23 645 061

2.5 Average length of stay for foreign arrivals

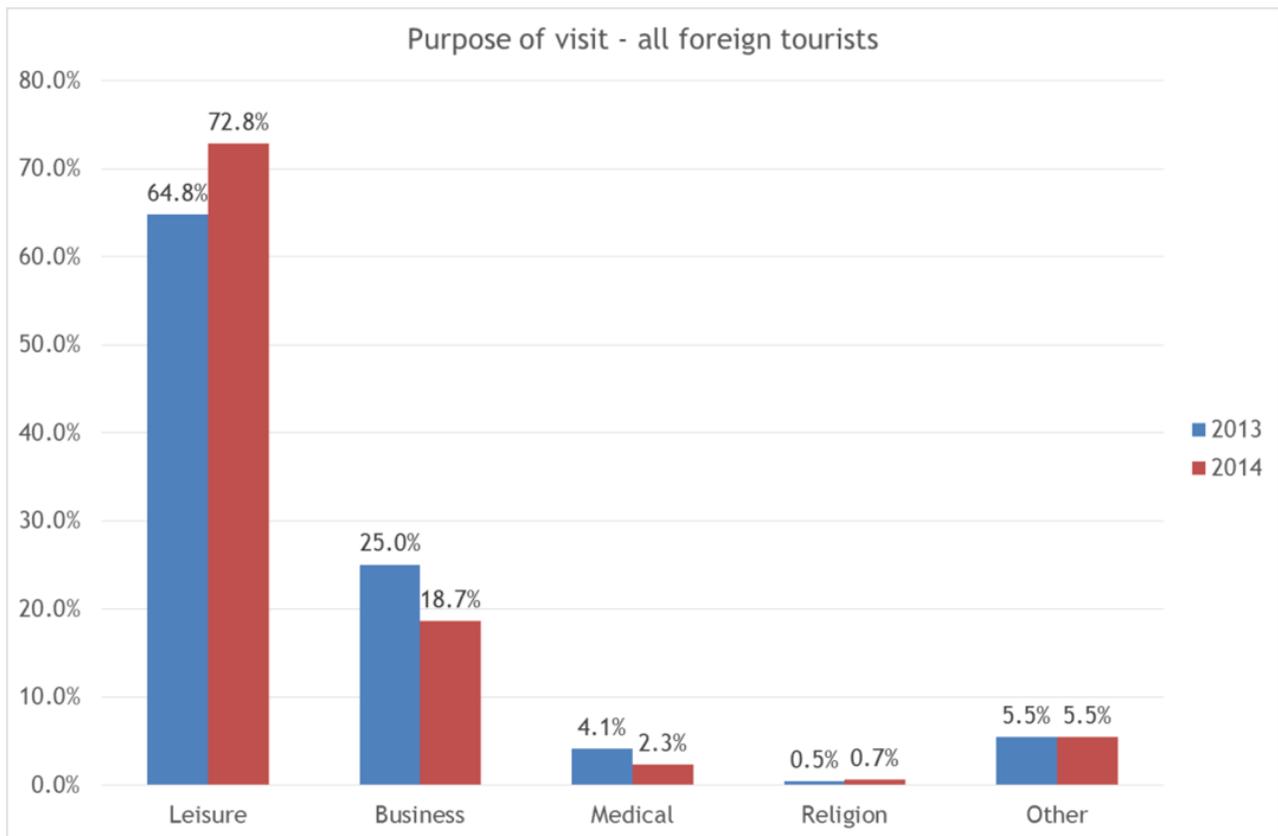
	2013	2014
	Mean	Mean
Gauteng	7.1	7.5
Western Cape	12.7	12.4
Eastern Cape	10.1	9.5
Kwazulu Natal	8.4	9.0
Mpumalanga	7.0	7.7
Limpopo	2.7	2.8
North West	6.0	5.4
Northern Cape	5.8	5.5
Free State	10.0	9.6
Average length of stay in SA	8.5	8.6

2.6 Activities undertaken in South Africa



Graph 2.6 Activities undertaken by International Visitors to South Africa (SA Tourism 2014 Annual Report)

2.7 Purpose of travel to South Africa



Graph 2.7 Purpose of Travel by International Visitors to South Africa (SA Tourism 2014 Annual Report)

2.8 International Visitors to Nelson Mandela Bay

Nelson Mandela Bay (Port Elizabeth, Uitenhage, Despatch and Colchester) was visited by 230 889 foreign visitors in 2014 up by 38 091 (19.8%) when compared to the 192 798 in 2013. This was about 75.7% share of the foreign visitors to the province.

The 230 889 foreign visitors spend 663 204 bednights in NMB in 2014. 383 183 of these bednights were in paid accommodation and 280 020 were in unpaid accommodation (Visiting Friends and Relatives) with an average length of stay of 2.9 days.

2.8.1 International Visitors Country From

Table 2.8.1 below shows a breakdown of the countries of origin of international visitors to Nelson Mandela Bay as supplied by SA Tourism for 2014.

Country	2013	2014
Germany	17.67%	17.64%
UK	14.94%	15.23%
USA	10.83%	12.61%
Netherlands	7.26%	8.70%
Other Europe	4.68%	5.33%
Australia	3.94%	4.55%
France	5.33%	4.46%
Italy	2.59%	3.40%
Switzerland	2.54%	3.29%
Canada	2.88%	3.08%
Denmark	0.99%	2.19%
Other Africa and Middle East	1.40%	1.71%
Sweden	1.55%	1.69%
Belgium	2.39%	1.68%
Spain	0.65%	1.46%
India	1.29%	1.32%
Lesotho	0.78%	1.30%
China including Hong Kong	1.69%	1.28%
Zimbabwe	5.41%	0.93%
Austria	1.42%	0.81%
Brazil	0.89%	0.78%
Other Asia and Australasia	1.18%	0.76%
New Zealand	0.72%	0.60%
Zambia	0.27%	0.60%
Swaziland	0.08%	0.54%
Other Americas	0.35%	0.48%
Nigeria	0.42%	0.47%
Botswana	0.54%	0.40%
Namibia	0.37%	0.34%
Japan	0.34%	0.32%
Kenya	0.39%	0.30%
Malawi	0.36%	0.29%
Russian Fed	0.27%	0.27%
South Korea	0.33%	0.26%
Argentina	0.39%	0.20%
Tanzania	0.16%	0.16%
Ghana	0.74%	0.15%

Uganda	0.27%	0.14%
Mozambique	0.49%	0.10%
Democratic Republic of Congo	0.54%	0.08%
Angola	0.57%	0.06%
Ethiopia	0.09%	0.05%

Table 2.8.1 Countries of Residence of International visitors to Nelson Mandela Bay (Source SA Tourism Data cut)

2.8.2 International Visitors Age Groups

Age Group	2013	2014
18 - 24	12.2%	11.0%
25 - 34	26.1%	29.0%
35 - 44	23.7%	22.5%
45 - 54	17.6%	17.5%
55 - 64	11.5%	11.4%
65 - 99	8.9%	8.6%

Table 2.8.2 International Visitor Age Groups to Nelson Mandela Bay (Source SA Tourism Data cut)

2.8.3 Foreign Bednights and Visitors Per Month

Below is a breakdown of international bednights spend in paid and unpaid (VFR) accommodation on a monthly basis and the number of visitors on a monthly basis.

	Foreign Paid	Foreign Unpaid	Total Bednights	Foreign Visitors
January	35935	26260	62196	21653
February	30600	22362	52962	18438
March	26686	19501	46187	16080
April	27546	20130	47676	16598
May	15530	11349	26878	9358
June	18016	13166	31182	10856
July	23879	17450	41329	14388
August	30778	22491	53269	18545
September	55362	40457	95820	33359
October	41797	30544	72342	25185
November	32569	23801	56370	19625
December	44485	32508	76993	26804
Grand Total	383183	280020	663204	230889

Table 2.8.3 International Visitors and bednights per month

2.8.4 Foreign Direct Spend

The foreign direct spend in Nelson Mandela Bay for 2014 declined by 2.34% from R 550 084 887 in 2013 to R 537 195 080 in 2014 even though there was an increase in both foreign bednights and number of visitors. This is due to the national average daily spend declining from R 870 to R 810 per foreign visitor.

NMBT is not in a position to calculate the average spend per foreign visitor to the city thus has to rely on the national average as supplied by SA Tourism.

Due to the nature of foreign tourists to Nelson Mandela Bay, the spend per foreign visitor to Nelson Mandela Bay is expected to be higher than the national average thus it is believed that we are under reporting on the foreign direct spend in the city. This will however be the case until a reliable and permanent solution is found on how to calculate the average daily spend of foreign visitors to the city.

2.8.5 Foreign Enquiries at Visitor Information Centers

In 2014 the top 10 number of foreign enquiries came from: Germany, United Kingdom, United States, Australia, France, Switzerland, Netherlands, India, Brazil, and Italy. There were a total of 5 876 foreign enquiries and 10 470 foreign visitors walked into the various offices to make enquiries. The top 5 most African enquiries came from in order: Zimbabwe, Nigeria, Namibia, Lesotho, and Zambia.

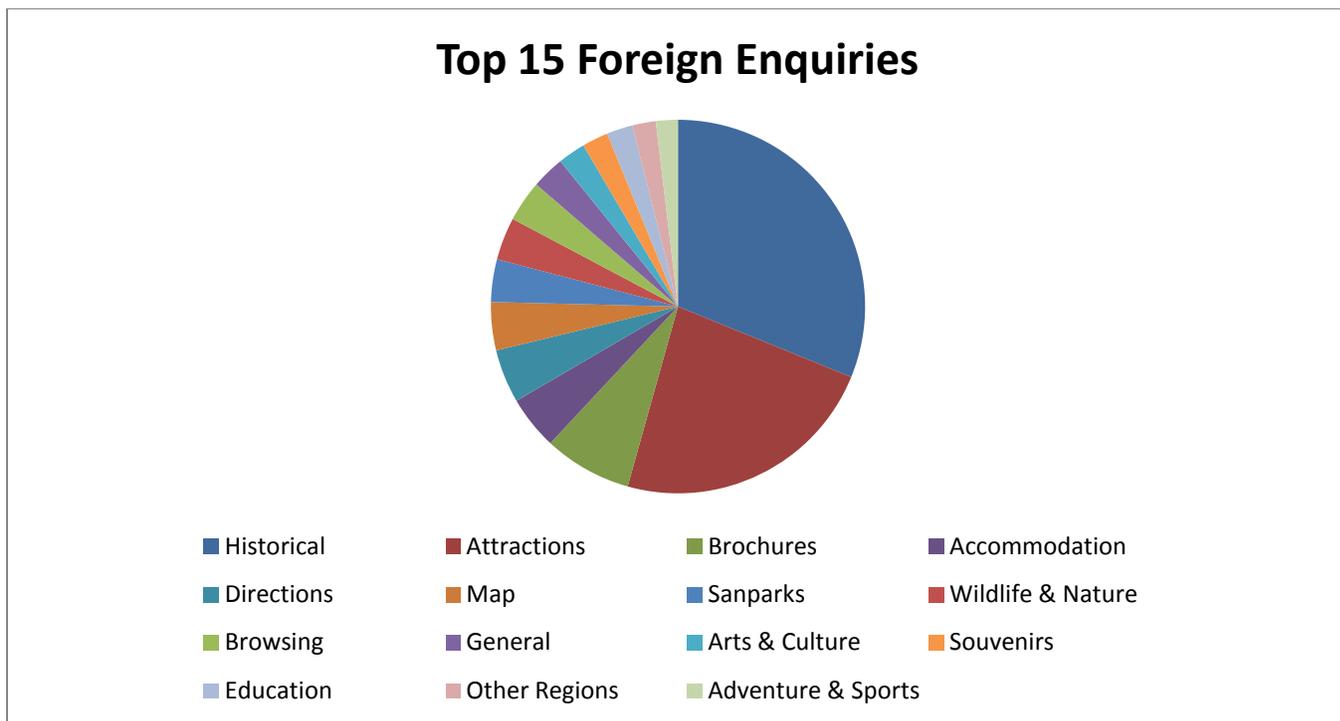
Foreign Countries enquiries were received from:

Overall Top 40

Germany	1476
United Kingdom	1275
United States	484
Australia	236
France	217
Switzerland	181
Netherlands	177
India	142
Brazil	133
Italy	108
China	95
Spain	87
Belgium	87
Canada	85
Zimbabwe	83
Sweden	77
Ireland	69
Israel	68

Austria	57
Argentina	56
Norway	38
Nigeria	37
Japan	34
Denmark	32
Namibia	31
New Zealand	31
Kenya	26
Poland	25
Portugal	25
Lesotho	24
Russia	22
Zambia	21
Ghana	16
Botswana	15
Turkey	15
Finland	14
Swaziland	13
Uganda	13
Tanzania	12
Korea, North	11

The graph below highlights the top 15 nature of enquiries received from foreign visitors.



3. Domestic Tourism

3.1 Overview of Domestic Tourism in South Africa

Key Metrics		2010	2011	2012	2013	2014
Domestic Travel Incidence	Annual	43%	44%	40%	35%	35%
	Monthly ¹	8%	7%	6%	6%	7%
Number of Trips	Annual	29.7 Million	26.3 Million	25.4 Million	25.2 Million	28.0 Million
	travellers	13.5 million	13.9 million	12.5 million	12.0 million	12.0 million
	Avg. Trip taken	2.4	2.1	2	2.1	2.3
	By Purpose	VFR: 74%, Holiday: 13%, Business: 5%	VFR: 73%, Holiday: 15%, Business: 4%	VFR: 72%, Holiday: 12%, Business: 7%	VFR: 70%, Holiday: 12%, Business: 8%	VFR: 73%, Holiday: 10%, Business: 6%
Spend	Total Annual Spend	R21.1 Billion	R20.2 Billion	R21.8 Billion	R24.3 Billion	R26.8 Billion
	By Purpose	VFR: 51%, Holiday: 31%, Business: 14%	VFR: 53%, Holiday: 29%, Business: 12%	VFR: 52%, Holiday: 23%, Business: 17%	VFR: 47%, Holiday: 26%, Business: 19%	VFR: 51%, Holiday: 22%, Business: 20%
	Average Spend per Trip / per Day	R710 / Trip;	R760 / Trip;	R850 / Trip;	R980 / Trip;	R950 / Trip;
		R160 / Day	R170 / Day	R180 / Day	R210 / Day	R230 / Day
Trip Length	Total Annual Bed Nights	130.8 Million	114.8 Million	121.2 Million	111.3 Million	113.1 Million
	Average Nights per Trip	4.4	4.4	4.8	4.4	4.0

(Source: SA Tourism Domestic Travel Highlights)

3.2 Domestic Trips in South Africa

Trips (domestic) - by SOURCE prov						
Province	2014	2013	2012	2011	2010	2009
Eastern Cape	3 131 000	1 402 000	1 638 000	2 229 000	3 043 000	4 798 000
Free State	763 000	326 000	466 000	604 000	970 000	778 000
Gauteng	9 962 000	10 827 000	10 112 000	9 630 000	9 609 000	8 836 000
KwaZulu Natal	4 328 000	5 418 000	5 614 000	6 167 000	7 112 000	7 912 000
Limpopo	5 089 000	2 905 000	3 772 000	2 465 000	2 752 000	1 235 000
Mpumalanga	1 205 000	1 379 000	1 406 000	1 110 000	1 015 000	649 000
Northern Cape	1 833 000	486 000	296 000	407 000	233 000	337 000
North West	278 000	77 000	122 000	1 113 000	1 818 000	1 683 000
Western Cape	1 420 000	2 350 000	2 008 000	2 675 000	3 170 000	4 050 000
	28 009 000	25 170 000	25 434 000	26 400 000	29 722 000	30 278 000

Trips (domestic) - by DESTINATION prov						
Province	2014	2013	2012	2011	2010	2009
Eastern Cape	3 224 000	2 050 000	2 314 000	2 861 000	3 977 000	5 884 000
Free State	1 043 000	878 000	1 137 000	1 166 000	1 061 000	1 673 000
Gauteng	4 293 000	4 456 000	4 199 000	5 100 000	6 388 000	5 044 000
KwaZulu Natal	5 280 000	7 307 000	6 215 000	7 224 000	8 348 000	9 073 000
Limpopo	7 367 000	5 583 000	5 109 000	3 500 000	2 939 000	1 942 000
Mpumalanga	3 330 000	3 153 000	2 917 000	2 188 000	1 743 000	1 685 000
Northern Cape	557 000	480 000	368 000	381 000	219 000	574 000
North West	2 298 000	994 000	1 194 000	1 914 000	2 498 000	1 358 000
Western Cape	1 606 000	2 406 000	1 960 000	2 403 000	2 698 000	3 498 000
	28 998 000	27 307 000	25 413 000	26 737 000	29 871 000	30 731 000

(Source: SA Tourism Data Cut)

3.3 Domestic spend by destination province

Spend (domestic) - by destination prov		
Province	2014	2013
Eastern Cape	R 3 033 206 000	R 2 450 827 000
Free State	R 1 124 933 000	R 712 535 000
Gauteng	R 4 407 680 000	R 3 636 055 000
KwaZulu Natal	R 5 171 381 000	R 6 605 806 000
Limpopo	R 5 515 685 000	R 4 256 590 000
Mpumalanga	R 2 424 464 000	R 2 671 877 000
Northern Cape	R 476 514 000	R 572 396 000
North West	R 1 884 056 000	R 1 122 809 000
Western Cape	R 2 798 306 000	R 2 251 160 000
Overall	R 26 836 225 000	R 24 280 055 000

(Source: SA Tourism Data Cut)

3.4 Domestic bednights per province

Bednights (domestic)		
Province	2014	2013
Eastern Cape	13 101 000	11 593 000
Free State	4 858 000	3 725 000
Gauteng	19 037 000	17 201 000
KwaZulu Natal	22 336 000	29 711 000
Limpopo	23 823 000	21 137 000
Mpumalanga	10 471 000	13 503 000
Northern Cape	2 058 000	2 552 000
North West	8 137 000	5 046 000
Western Cape	12 086 000	12 102 000
Overall	115 907 000	116 570 000

(Source: SA Tourism Data Cut)

3.5 Average length of stay for domestic visitors to the province

Length of stay (domestic)		
Province	2014	2013
Eastern Cape	4.1	5.7
Free State	4.7	4.2
Gauteng	4.4	3.9
KwaZulu Natal	4.2	4.1
Limpopo	3.2	3.8
Mpumalanga	3.1	4.3
Northern Cape	3.7	5.3
North West	3.5	5.1
Western Cape	7.5	5.0

(Source: SA Tourism Data Cut)

3.6 Purpose of visit to province

Purpose of visit (domestic)						
2014						
Province	Holiday	VFR	Business	Medical	Religious	Total
Eastern Cape	118 000	2 400 000	114 000	68 000	437 000	3 137 000
Free State	81 000	776 000	60 000	-	36 000	953 000
Gauteng	403 000	3 192 000	273 000	49 000	131 000	4 048 000
KwaZulu Natal	578 000	4 073 000	388 000	-	176 000	5 215 000
Limpopo	314 000	5 183 000	451 000	-	948 000	6 896 000
Mpumalanga	443 000	2 169 000	153 000	-	405 000	3 170 000
Northern Cape	97 000	415 000	17 000	-	-	529 000
North West	281 000	1 656 000	269 000	-	62 000	2 268 000
Western Cape	529 000	800 000	110 000	103 000	26 000	1 568 000
2013						
Province	Holiday	VFR	Business	Medical	Religious	Total
Eastern Cape	151 000	1 344 000	175 000	29 000	244 000	1 945 000
Free State	92 000	649 000	83 000	-	6 000	832 000
Gauteng	383 000	2 750 000	200 000	-	423 000	3 757 000
KwaZulu Natal	1 125 000	5 336 000	155 000	64 000	228 000	6 911 000
Limpopo	285 000	3 708 000	358 000	-	667 000	5 019 000
Mpumalanga	210 000	1 996 000	598 000	24 000	40 000	2 870 000
Northern Cape	110 000	234 000	52 000	-	32 000	429 000
North West	166 000	509 000	168 000	-	69 000	914 000
Western Cape	528 000	1 374 000	256 000	-	133 000	2 293 000

(Source: SA Tourism Data Cut)

3.7 Domestic visitors to Nelson Mandela Bay

Nelson Mandela Bay (Port Elizabeth, Uitenhage, Despatch and Colchester) was visited by 7 367 941 domestic visitors in 2014 down from the 7 380 928 visitors in 2013. This consisted of 590 613 visitors staying in formal accommodation such as hotels and B&B's, 1 303 048 overnight visitors staying in unpaid or VFR (Visiting Friends and Relatives) accommodation and 5 474 280 day visitors to NMB.

The overnight visitors spend 8 142 743 bednights in NMB in 2014. 2 539 635 of these bednights were in paid accommodation and 5 603 108 were in unpaid accommodation (Visiting Friends and Relatives) with an average length of stay of 4.3 days.

3.7.1 Domestic bednights and visitors per month

	Paid Bednights	Unpaid Bednights	Total Bednights	Paid Overnight Visitors	VFR Overnight Visitors	Overnight Visitors
January	163789	361362	525151	38090	84038	122128
February	219601	484497	704098	51070	112674	163744
March	182806	403318	586124	42513	93795	136308
April	195601	431548	627149	45489	100360	145849
May	196821	434239	631060	45772	100986	146758
June	192908	425607	618515	44862	98978	143841
July	208499	460003	668502	48488	106977	155466
August	217858	480653	698512	50665	111780	162445
September	186830	412197	599027	43449	95860	139309
October	202265	446251	648516	47038	103779	150818
November	249388	550216	799605	57997	127957	185955
December	323269	713217	1036485	75179	165864	241043
Grand Total	2539635	5603108	8142743	590613	1303048	1893661

3.7.2 Domestic Direct Spend

The domestic direct spend in Nelson Mandela Bay for 2014 increased by 21.92% from R 4 524 763 084 in 2013 to R 5 516 445 660 in 2014. This is due to an increase of mostly VFR visitors and an increase in the average domestic visitor spend per day of around R 405.11.

4. Nelson Mandela Bay Accommodation Occupancy 2014

	Total	Quarter 1		2014					
	Facilities in NMB	Beds available	Beds Sold in Quarter	Average Occupancy	Average bed Rate	Total Income generated	Foreign %	Domestic %	Average Length of stay
Hotel	38	5471	272798	55.40%	R 789.10	R 215 264 332	15.92%	84.08%	1.9
Self-Catering	100	4106	179049	48.45%	R 353.11	R 63 223 083	9.80%	90.20%	3.7
B&B	96	1377	61969	50.00%	R 410.07	R 25 411 644	7.46%	92.54%	5.7
Guest House	133	2061	92893	50.08%	R 408.91	R 37 985 130	9.81%	90.19%	5.5
Camping & Caravanning	5	1448	23949	18.38%	R 170.53	R 4 083 943	0.33%	99.67%	1.3
Backpackers	14	763	28758	41.88%	R 137.90	R 3 965 795	64.53%	35.47%	2.8
TOTAL	386	15226	659417	48.12%	R 530.67	R 349 933 926	14.16%	85.84%	3.5
Difference	-1	-6	-103441	-7.53%	R 240.22	R 128 358 018	-5.20%	5.20%	0.1

	Total	Quarter 2		2014					
	Facilities in NMB	Beds available	Beds Sold in Quarter	Average Occupancy	Average bed Rate	Total Income generated	Foreign %	Domestic %	Average Length of stay
Hotel	38	5471	265724	53.37%	R 825.36	R 219 317 870	13.50%	86.50%	2.0
Self-Catering	100	4106	182099	48.74%	R 447.72	R 81 529 418	3.82%	96.18%	3.4
B&B	96	1377	62186	49.63%	R 484.99	R 30 160 005	2.28%	97.72%	4.7
Guest House	133	2061	92716	49.43%	R 480.15	R 44 517 118	4.06%	95.94%	5.2
Camping & Caravanning	5	1448	22893	17.37%	R 164.00	R 3 754 432	0.57%	99.43%	0.7
Backpackers	14	763	20805	29.96%	R 138.95	R 2 890 841	57.39%	42.61%	1.9
TOTAL	386	15226	646423	46.65%	R 591.21	R 382 169 683	9.29%	90.71%	3.0
Difference	-1	-6	34262	2.49%	R 315.34	R 213 292 673	-2.26%	2.26%	-0.1

	Total	Quarter 3		2014					
	Facilities in NMB	Beds available	Beds Sold in Quarter	Average Occupancy	Average bed Rate	Total Income generated	Foreign %	Domestic %	Average Length of stay
Hotel	38	5471	241145	48.44%	564.7687739	R 136 191 317	20.76%	79.24%	2.8
Self-Catering	100	4106	222461	59.54%	195.0258197	R 43 385 644	7.02%	92.98%	4.6
B&B	96	1377	57110	45.58%	464.0622179	R 26 502 581	12.39%	87.61%	4.6
Guest House	133	2061	87350	46.57%	437.0209613	R 38 173 926	22.74%	77.26%	4.8
Camping & Caravanning	5	1448	89665	68.05%	156.1820566	R 14 003 987	3.77%	96.23%	2.7
Backpackers	14	763	25475	36.69%	136.9420785	R 3 488 605	51.19%	48.81%	2.5
TOTAL	386	15226	723206	52.20%	R 361.92	R 261 746 060	15.08%	84.92%	3.7
Difference	-1	-6	86740	6.28%	R 62.03	R 70 873 574	2.40%	-2.40%	-0.7

	Total	Quarter 4		2014					
	Facilities in NMB	Beds available	Beds Sold in Quarter	Average Occupancy	Average bed Rate	Total Income generated	Foreign %	Domestic %	Average Length of stay
Hotel	38	5471	307476	61.09%	518.0523119	R 159 288 482	20.91%	79.09%	3.6
Self-Catering	100	4326	265808	66.79%	266.8967012	R 70 943 289	5.26%	94.74%	4.7
B&B	95	1389	69303	54.23%	378.1232376	R 26 205 196	13.68%	86.32%	5.1
Guest House	133	2087	103867	54.10%	366.2913124	R 38 045 758	18.89%	81.11%	3.5
Camping & Caravanning	5	1448	102851	77.21%	155.782116	R 16 022 415	2.09%	97.91%	3.3
Backpackers	14	763	44468	63.35%	205.3191489	R 9 130 058	30.00%	70.00%	3.0
TOTAL	385	15484	893774	62.74%	R 357.62	R 319 635 199	13.75%	86.25%	3.9
Difference	-2	252	173277	11.33%	R 26.55	R 81 096 651	-0.46%	0.46%	0.9

5. Economic Impact of tourism in Nelson Mandela Bay 2014

In 2014 international visitors to Nelson Mandela Bay contributed R 537 195 080 to the economy of the city. Domestic Overnight Visitors contributed R 2 674 235 782 and day visitors R 2 842 209 878 for an overall domestic contribution of R 5 516 445 660. This was enough to sustain 44 254 jobs for the year.

There was a total of 2 922 819 bednights sold during the year at an average bednight occupancy rate of 52.51% and average rate per bednight sold of R 449.39. This made the total contribution of R 1 313 484 868.24 from paid accommodation. 13.11% of these bednights sold was to foreign visitors and 83.41% to domestic visitors.

Using the WTTC (World Travel and Tourism Council) multiplier for South Africa the direct and indirect contribution of tourism stands at R 18 160 922 220 for 2014.

Economic Impact of tourism in Nelson Mandela Bay from 2011-2014:

	2011	2012	2013	2014
Foreign Direct spend	R 613 415 496	R 866 274 135	R 550 084 887	R 537 195 080
Domestic Direct spend overnight Visitors	R 1 874 532 458	R 2 055 130 906	R 2 053 276 234	R 2 674 235 782
Day Visitor Spend	R 1 785 168 000	R 2 149 119 000	R 2 471 486 850	R 2 842 209 878
Domestic Direct spend Overall	R 3 659 700 458	R 4 204 249 906	R 4 524 763 084	R 5 516 445 660
Overall Direct Spend	R 4 273 115 954	R 5 070 524 041	R 5 074 847 971	R 6 053 640 740
Job Creation/Sustainability	34 842	39 813	38 424	44 254
WTTC Multiplier for SA	3.14	3.12	3.13	3.00
Direct and Indirect	R 13 417 584 096	R 15 820 035 007	R 15 884 274 149	R 18 160 922 220

6. NMBT Visitor Information Centre Statistics 2014

The 2014 data collected at each of the four Nelson Mandela Bay Tourism Visitor Information Centers and the NMBT Call Center show a total of 22 280 enquiries received at all the Visitor Information Centers.

Foreign enquiries equate for 5 876 enquiries (10 470 walk in's) and Domestic visitors equate for 16 404 enquiries (20 099 walk in's).

During this period Nelson Mandela Bay Tourism's VIC's and Call Centre made 9 445 bookings consisting of 8 596 SA National Park bookings, 101 Accommodation bookings, and 748 other type bookings.

Foreign Enquiries:

In 2014 the top 10 number of foreign enquiries came from: Germany, United Kingdom, United States, Australia, France, Switzerland, Netherlands, India, Brazil, and Italy. There were a total of 5876 foreign enquiries and 10470 foreign visitors walked into the various offices to make enquiries. The top 5 most African enquiries came from in order: Zimbabwe, Nigeria, Namibia, Lesotho, and Zambia. Overall Foreign visitors mostly enquired about: Attractions, Map, Directions, Other Regions, and Historical.

Domestic Enquiries:

In 2014 the most number of domestic enquiries came from in order: Eastern Cape, Western Cape, Gauteng, KZN, Free State, Mpumalanga, Northern Cape, North West, and Limpopo. There were a total of 16404 domestic enquiries and 20099 domestic visitors walked into the various offices to make enquiries. Domestic visitors mostly enquired about: Sanparks, Contact No., Accommodation, Attractions, and Brochures.

Nature of Enquiries:

The top 10 nature of enquiries received at all the Visitor Information Centers for 2014 were for, in order: Sanparks, Contact No., Attractions, Accommodation, Brochures, Directions, Historical, Map, Other Regions, and Browsing.

2014	Donkin	Boardwalk	Uitenhage	Airport	Call Centre	Overall
Number of Enquiries:	3443	6227	479	8735	3396	22280
Telephone Call	437	1518	145	4373	1767	8240
Walk In	2998	4696	333	4281	146	12454
E-mail (online):	8	13	1	81	1483	1586
International Enquiries:	1484	2256	4	2054	78	5876
Domestic Enquiries:	1959	3971	475	6681	3318	16404
International Foot Count	3191	4391	72	2799	17	10470
Domestic Foot Count	4087	5035	7388	3418	171	20099
Total Foot Count	7278	9426	7460	6217	188	30569
Top 3 Queries:	Historical, Attractions, Directions	Sanparks, Attractions, Brochures	Education, General, Brochures	Sanparks, Contact No., Other Regions	Sanparks, Accommodation, Contact No.	Sanparks, Contact No., Attractions
Bookings:	260	1921	3	3515	3746	9445
- SANParks	232	1672	3	3427	3262	8596
- Accommodation	12	12	0	52	25	101
- Other (Tours, Pass etc)	16	237	0	36	459	748

The Donkin's top 3 nature of enquiries were for Historical, Attractions, Directions. They received 1484 International enquiries and 1959 domestic enquiries. Enquiries were made via the following modes: 437 telephone calls, 2998 walk in's (7278 visitors), and 8 e-mail or online enquiries.

The Boardwalk's top 3 nature of enquiries were for Sanparks, Attractions, Brochures. They received 2256 International enquiries and 3971 domestic enquiries. Enquiries were made via the following modes: 1518 telephone calls, 4696 walk in's (9426 visitors), and 13 e-mail or online enquiries.

Uitenhage's top 3 nature of enquiries were for Education, General, Brochures. They received 4 International enquiries and 475 domestic enquiries. Enquiries were made via the following modes: 145 telephone calls, 333 walk in's (7460 visitors), and 1 e-mail or online enquiries.

The Airport's top 3 nature of enquiries were for Sanparks, Contact No., Other Regions. They received 2054 International enquiries and 6681 domestic enquiries. Enquiries were made via the following modes: 4373 telephone calls, 4281 walk in's (6217 visitors), and 81 e-mail or online enquiries.

The NMBT Call Centre's top 3 nature of enquiries were for Sanparks, Accommodation, Contact No. They received 78 International enquiries and 3318 domestic enquiries. Enquiries were made via the following modes: 1767 telephone calls, 146 walk in's (188 visitors), and 1483 e-mail or online enquiries.

Overall the top 3 nature of enquiries were for Sanparks, Contact No., and Attractions. NMBT received 5876 International enquiries and 16404 domestic enquiries. Enquiries were made via the following modes: 8240 telephone calls, 12454 walk in's (30569 visitors), and 1586 e-mail or online enquiries.

6.1 Nature of Enquiries

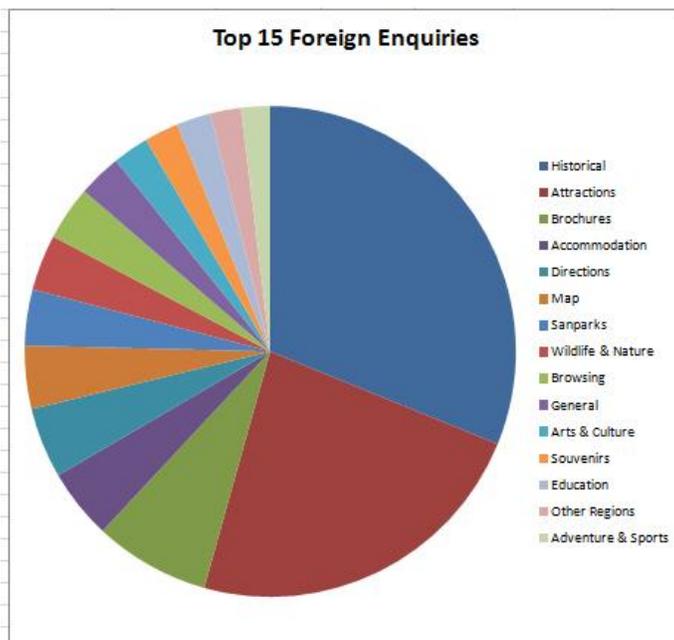
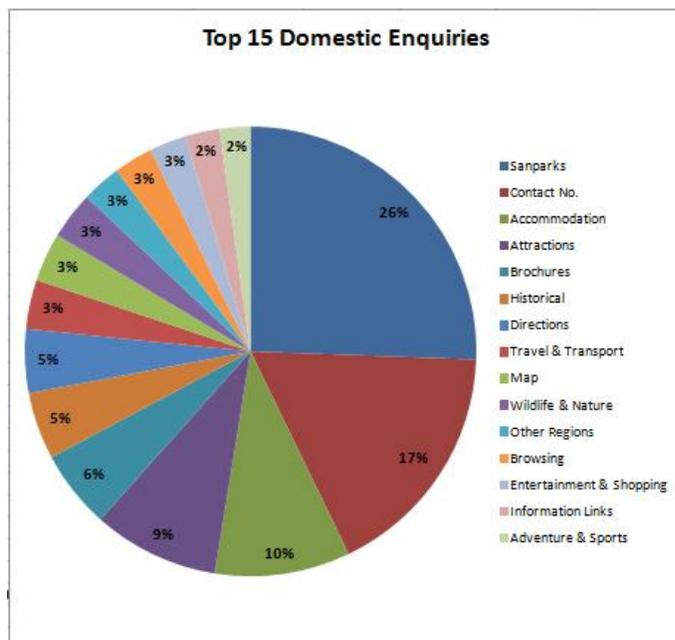
Donkin	Historical	920
	Attractions	592
	Directions	274
	Brochures	212
	Arts & Culture	198
	Browsing	153
	Contact No.	130
	Accommodation	120
	Sanparks	117
	Map	112
Donkin Total		2828

Boardwalk	Sanparks	1383
	Attractions	730
	Brochures	495
	Browsing	401
	Map	349
	Directions	321
	Entertainment & Shopping	317
	Other Regions	280
	Accommodation	202
	Travel & Transport	200
Boardwalk Total		4678

Uitenhage	Education	226
	General	56
	Brochures	35
	Directions	29
	Accommodation	22
	Business & Conferencing	19
	Contact No.	17
	Curios	13
	Browsing	11
	Information Links	11
Uitenhage Total		439

Airport	Sanparks	2578
	Contact No.	1412
	Other Regions	596
	Map	544
	Directions	499
	Travel & Transport	449
	Brochures	433
	Attractions	359
	Accommodation	339
	Browsing	297
Airport Total		7506

Call Center	Sanparks	947
	Accommodation	865
	Contact No.	650
	Travel & Transport	139
	Attractions	132
	Wildlife & Nature	109
	Business & Conferencing	106
	General	99
	Adventure & Sports	80
	NMB Pass	46
Call Center Total		3173



6.2 Enquiry Sources:

International Enquiries Top 40

Germany	1476
United Kingdom	1275
United States	484
Australia	236
France	217
Switzerland	181
Netherlands	177
India	142
Brazil	133
Italy	108
China	95
Spain	87
Belgium	87
Canada	85
Zimbabwe	83
Sweden	77
Ireland	69
Israel	68
Austria	57
Argentina	56
Norway	38
Nigeria	37
Japan	34
Denmark	32
Namibia	31
New Zealand	31
Kenya	26
Poland	25
Portugal	25
Lesotho	24
Russia	22
Zambia	21
Ghana	16
Botswana	15
Turkey	15
Finland	14
Swaziland	13
Uganda	13
Tanzania	12
Korea, North	11
Grand Total	5648

Domestic Enquiries Overall

	#	%
Eastern Cape	10 731	68.15%
Western Cape	2 066	13.12%
Gauteng	1 841	11.69%
KZN	534	3.39%
Free State	299	1.90%
Mpumalanga	82	0.52%
Northern Cape	79	0.50%
North West	60	0.38%
Limpopo	54	0.34%
Grand Total	15 746	100%

Time of Enquiry:

The graph below shows the time enquiries were received at each of the Visitor Information Centres.

