

# **Tourist accommodation**

## **September 2004 to January 2005**

**Embargoed until: 2 June 2005, 11:00**

In this publication, Stats SA releases the results of the **new monthly tourist accommodation survey** for the months of September 2004 to January 2005. These results are based on a new sample drawn in July 2004 from Statistics South Africa's business register.

This new release is not comparable to the discontinued release *Hotels' Trading Statistics*. The Hotels' Trading Statistics survey was conducted using a list of all hotels graded by the then South African Tourism Board (Satour) when the grading of hotels was still compulsory by law. The new survey covers enterprises that are registered for income tax (IT) and are primarily involved in providing short-stay commercial accommodation. These include: hotels, caravan parks and camping sites, guest-houses and guest-farms, and other accommodation.

Note: This publication excludes all enterprises not registered for tax and/or whose main activity is not providing short-stay commercial accommodation. It also excludes those accommodation enterprises contributing less than 0.5% of the total tax turnover. Nevertheless, raising factors have been applied to the statistics in this release to take into account these small accommodation enterprises.

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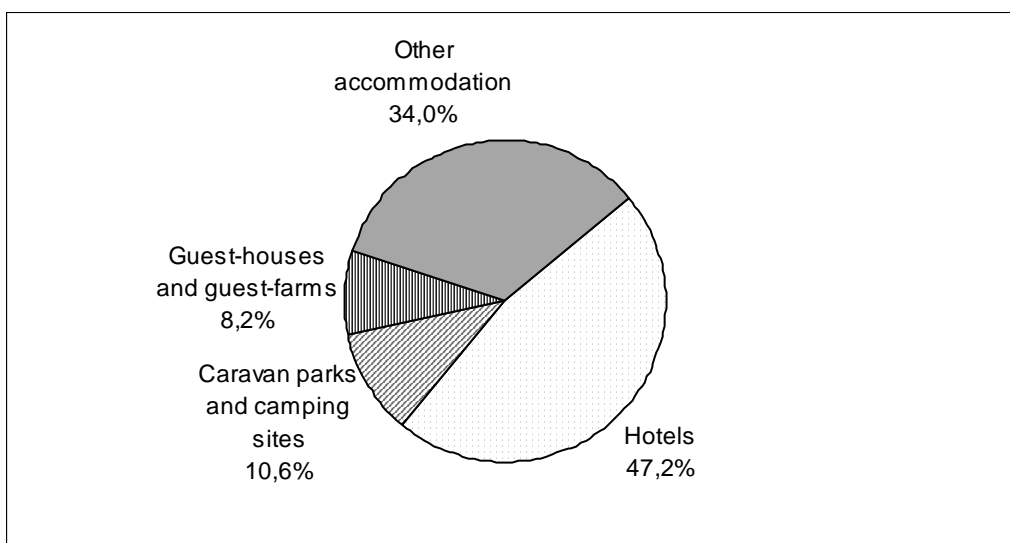
## Key findings for the months September 2004 to January 2005

### Stay units available

**Note:** Stay unit refers to the unit of accommodation that is available to be charged out to guests, for example, a powered site in a caravan park or a room in a hotel.

There were an average monthly total of 99 600 stay units available in the South African accommodation industry in the period September 2004 to January 2005 (see table 1, last column). The largest contributor to this number was hotels (47 000 or 47,2%), followed by 'other accommodation', for example bed and breakfast enterprises and lodges (33 800 or 34,0%), caravan parks and camping sites (10 600 or 10,6%) and guest-houses and guest-farms (8 200 or 8,2%) (see table 1 and figure 1).

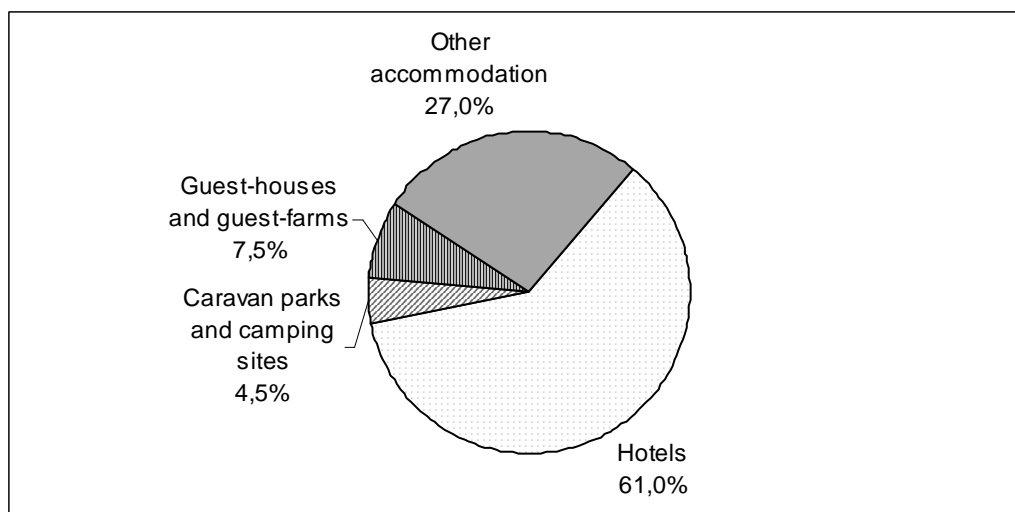
**Figure 1 – Average monthly stay units available by type of accommodation**



### Stay unit nights sold

The average monthly total number of stay unit nights sold during the five months was 1 589 700 (see table 1). Most were sold by hotels (969 000 or 61,0%), followed by 'other accommodation' (429 900 or 27,0%), guest-houses and guest-farms (120 000 or 7,5%), caravan parks and camping sites (70 800 or 4,5%) (see table 1 and figure 2).

**Figure 2 – Average monthly stay unit nights sold by type of accommodation**

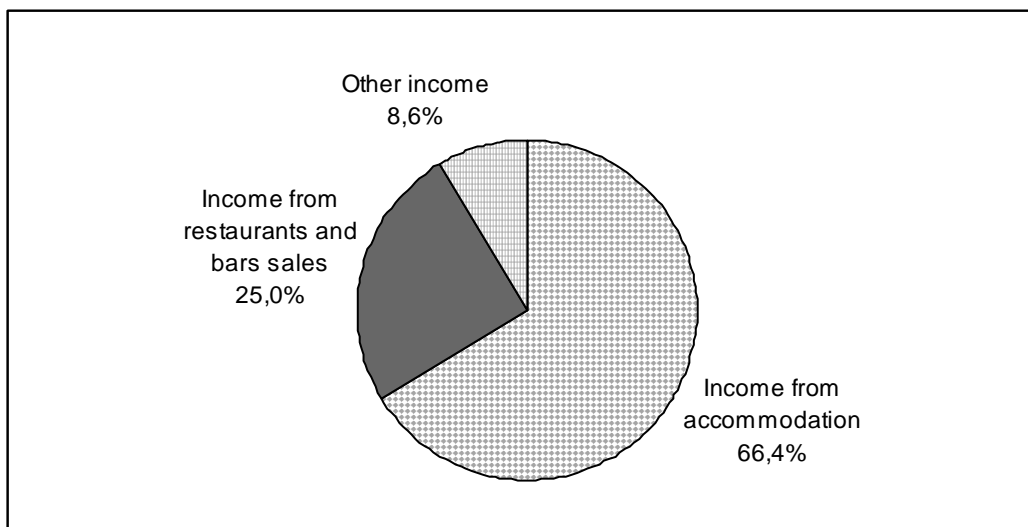


The highest number of stay unit nights of 1 690 800 was sold in December 2004. This was mainly due to the higher number sold by caravan parks and camping sites and ‘other accommodation’ than in the other four months. However, the number of stay unit nights sold by hotels in December 2004 was the second lowest of all the five months (see table 1).

**Income**

The average monthly total income in the accommodation industry for the five months was R 963,9 million (see table 1). Most of the income was derived from accommodation (R 639,6 million or 66,4%), followed by income from restaurant and bar sales (R 240,8 million or 25,0%) and ‘other income’ (R 83,4 million or 8,6%) (see table 1 and figure 3).

**Figure 3 – Average monthly income distribution by type of income**



The high increase of 13,0% in total income from accommodation in October 2004 compared to September 2004 could be due to the increase in accommodation rates and thus in ‘income per stay unit night sold’ (+9,4%) (see table 2). As the series progresses, Stats SA will be in a better position to monitor changes in patterns and seasonal variation over time.

High increases in income per stay unit night sold in December 2004 compared to November 2004 were largely reported by caravan parks and camping sites (+24,8%), hotels (+8,3%) and ‘other accommodation’ (+2,4%).

**Notes****Forthcoming issue****Issue**

March 2005

**Expected release date**

07 July 2005

**Purpose of the survey**

The Survey of Tourist Accommodation is a monthly survey covering a sample of public and private enterprises involved in the short-stay accommodation industry in South Africa. The purpose of the new survey is to increase the scope and coverage of South African tourism enterprises and establishments surveyed.

The results of the survey are used to compile estimates of the Tourism Satellite Accounts (TSA), and the Gross Domestic Product (GDP) and its components, which are used to develop and monitor government policy. These statistics are also used in the analysis of comparative business and industry performance. In future the results of the survey will be published monthly in the statistical release P6410: *Tourist Accommodation*.

**P J Lehohla**  
**Statistician-General**

**Table 1: Summary of accommodation statistics**

Accommodation type	Month and Year					
	September 2004	October 2004	November 2004	December 2004	January 2005	Monthly Average
<b>Hotels</b>						
Stay units available ('000)	47,9	47,8	46,6	46,8	46,1	47,0
Stay units nights sold ('000)	972,7	1025,9	1043,3	916,7	886,3	969,0
Occupancy rate (%)	67,7	69,2	74,6	63,2	62,0	67,4
Income per stay unit nights sold (Rand)	414,93	433,28	428,54	463,95	470,04	442,15
Income from accommodation (R million)	403,6	444,5	447,1	425,3	416,6	427,4
Income from restaurant and bar sales (R million)	182,4	201,8	208,3	218,7	174,7	197,2
Other income (R million)	38,3	47,2	48,1	43,0	36,2	42,6
Total income (R million)	624,3	693,5	703,5	687,0	627,5	667,2
<b>Caravan parks and camping sites</b>						
Stay units available ('000)	10,4	10,4	10,6	10,6	10,9	10,6
Stay units nights sold ('000)	49,2	42,4	44,8	152,0	65,8	70,8
Occupancy rate (%)	15,8	13,2	14,1	46,3	19,5	21,7
Income per stay unit nights sold (Rand)	170,73	167,45	171,88	214,47	167,17	178,34
Income from accommodation (R million)	8,4	7,1	7,7	32,6	11,0	13,4
Income from restaurant and bar sales (R million)	3,3	2,6	2,7	3,3	2,7	2,9
Other income (R million)	1,1	1,5	1,6	1,5	1,8	1,5
Total income (R million)	12,8	11,2	12,0	37,4	15,5	17,8
<b>Guest-houses and guest-farms</b>						
Stay units available ('000)	7,8	8,0	7,9	8,0	9,3	8,2
Stay units nights sold ('000)	94,4	107,4	114,5	132,7	151,1	120,0
Occupancy rate (%)	40,3	43,3	48,3	53,5	52,4	47,6
Income per stay unit nights sold (Rand)	395,13	452,51	449,78	459,68	386,50	428,72
Income from accommodation (R million)	37,3	48,6	51,5	61,0	58,4	51,4
Income from restaurant and bar sales (R million)	9,7	12,5	13,0	11,2	11,2	11,5
Other income (R million)	8,0	9,8	9,6	6,3	6,2	8,0
Total income (R million)	55,0	70,9	74,1	78,5	75,8	70,9
<b>Other accommodation</b>						
Stay units available ('000)	33,5	34,4	33,9	33,4	33,6	33,8
Stay units nights sold ('000)	394,9	404,6	421,2	489,4	439,2	429,9
Occupancy rate (%)	39,3	37,9	41,4	47,3	42,2	41,6
Income per stay unit nights sold (Rand)	305,65	356,15	345,92	354,11	349,95	342,36
Income from accommodation (R million)	120,7	144,1	145,7	173,3	153,7	147,5
Income from restaurant and bar sales (R million)	27,3	31,5	32,4	30,7	24,2	29,2
Other income (R million)	29,5	34,1	30,2	34,1	28,8	31,3
Total income (R million)	177,5	209,7	208,3	238,1	206,7	208,1
<b>Total</b>						
Stay units available ('000)	99,6	100,6	99,0	98,8	99,9	99,6
Stay units nights sold ('000)	1 511,2	1580,3	1 623,8	1 690,8	1 542,4	1 589,7
Occupancy rate (%)	50,6	52,4	54,7	57,0	51,5	53,2
Income per stay unit nights sold (Rand)	377,18	407,71	401,53	409,39	414,74	402,11
Income from accommodation (R million)	570,0	644,3	652,0	692,2	639,7	639,6
Income from restaurant and bar sales (R million)	222,7	248,4	256,4	263,9	212,8	240,8
Other income (R million)	76,9	92,6	89,5	84,9	73,0	83,4
Total income (R million)	869,6	985,3	997,9	1 041,0	925,5	963,9

**Notes**

1. All figures are preliminary.
2. **Total income** includes income from accommodation, income from restaurants and bar sales and other income.
3. **Other accommodation** includes lodges, bed and breakfast, self-catering establishments and other.
4. **Monthly average** is the sum of all the months (September 2004 to January 2005) values divided by five.

**Table 2: Percentage change in tourist accommodation statistics from month on previous month**

Accommodation type	Month and Year			
	October 2004	November 2004	December 2004	January 2005
	%	%	%	%
<b>Hotels</b>				
Stay units available	-0,2	-2,5	0,4	-1,5
Stay units nights sold	3,5	1,7	-12,1	-3,3
Occupancy rate	0,4	7,8	-15,3	-1,8
Income per stay unit nights sold	6,4	-1,1	8,3	1,3
Income from accommodation	10,1	0,6	-4,9	-2,0
Income from restaurants and bar sales	10,6	3,2	5,0	-20,1
Other income	23,2	1,9	-10,6	-15,8
Total income	11,1	1,4	-2,3	-8,7
<b>Caravan parks and camping sites</b>				
Stay units available	0,0	1,9	0,0	2,8
Stay units nights sold	-13,8	5,7	239,3	-56,7
Occupancy rate	-16,6	7,1	228,3	-57,9
Income per stay unit nights sold	-1,9	2,6	24,8	-22,1
Income from accommodation	-15,5	8,5	323,4	-66,3
Income from restaurants and bar sales	-21,2	3,8	22,2	-18,2
Other income	36,4	6,7	-6,3	20,0
Total income	-12,5	7,1	211,7	-58,6
<b>Guest-houses and guest-farms</b>				
Stay units available	2,6	-1,3	1,3	16,3
Stay units nights sold	13,8	6,6	15,9	13,9
Occupancy rate	7,3	11,6	10,8	-2,1
Income per stay unit nights sold	14,5	-0,6	2,2	-15,9
Income from accommodation	30,3	6,0	18,4	-4,3
Income from restaurants and bar sales	28,9	4,0	-13,8	0,0
Other income	22,5	-2,0	-34,4	-1,6
Total income	28,9	4,5	5,9	-3,4
<b>Other accommodation</b>				
Stay units available	2,7	-1,5	-1,5	0,6
Stay units nights sold	2,5	4,1	16,2	-10,3
Occupancy rate	-3,4	9,2	14,1	-10,8
Income per stay unit nights sold	16,5	-2,9	2,4	-1,2
Income from accommodation	19,4	1,1	18,9	-11,3
Income from restaurants and bar sales	15,4	2,9	-5,2	-21,2
Other income	15,6	-11,4	12,9	-15,5
Total income	18,1	-0,7	14,3	-13,2
<b>Total</b>				
Stay units available	1,0	-1,6	-0,2	1,1
Stay units nights sold	3,3	2,8	4,1	-8,8
Occupancy rate	2,3	4,4	4,3	-9,8
Income per stay unit nights sold	9,4	-1,5	2,0	1,3
Income from accommodation	13,0	1,2	6,2	-7,6
Income from restaurants and bar sales	11,5	3,2	2,9	-19,4
Other income	20,4	-3,3	-5,1	-14,0
Total income	13,3	1,3	4,3	-11,1

## Explanatory notes

### Introduction

The results presented in this publication are derived from the monthly survey of the tourist accommodation industry conducted from September 2004 to January 2005. This survey is based on a sample of private and public enterprises operating in the tourist accommodation industry.

The sample was drawn from Statistics South Africa's (Stats SA) business sampling frame, which contains all enterprises that are registered for income tax (IT). Thus, enterprises that are not registered for tax are excluded from this survey.

### Scope of the survey

This survey covers the following **tax registered** private and public enterprises that are **mainly** engaged in providing short-stay commercial accommodation:

- Hotels,
- Caravan parks and camping sites,
- Guest-houses and guest-farms, and
- Other accommodation.

### Classification by industry

The 1993 edition of the *Standard Industrial Classification of all Economic Activities (SIC)*, Fifth Edition, Report No. 09-09-02, was used to classify the statistical units in the survey. The SIC is based on the 1990 *International Standard Industrial Classification of all Economic Activities (ISIC)* with suitable adaptations for local conditions. Statistics in this publication are presented at 5-digit SIC level. Each enterprise is classified to an industry, which reflects its predominant activity.

### Size groups

The enterprises are divided into four size groups according to turnover. Large enterprises are enterprises with an annual turnover of R13 million and more. The Department of Trade and Industry (DTI) cut-off points defining the size groups, namely large, medium, small and micro enterprises, are given in table B.

**Table B – Size groups for the tourist accommodation industry**

Size group	Turnover
Large	> R 13 000 000
Medium	R 6 000 000 to < R 13 000 000
Small	R 5 100 000 to < R 6 000 000
Micro	< R 5 100 000

### Statistical unit

The statistical units for the collection of the information are enterprises and establishments.

### Survey methodology and design

The survey was conducted by mail, fax and telephone.

A sample of approximately 800 enterprises was drawn from a population of approximately 7 500 enterprises using stratified simple random sampling. The enterprises were first stratified at 5-digit level according to the SIC and then by size of enterprises. All large enterprises are completely enumerated. Turnover was used as the measure of size for stratification.



**Weighting methodology** For those strata not completely enumerated, the weights to produce estimates are the inverse ratio of the sampling fraction, modified to take account of non-response in the survey. Stratum estimates are calculated and then aggregated with the completely enumerated stratum to form division estimates. These procedures, which are in line with international best practice, are described in more detail on the Stats SA website at [www.statssa.gov.za/publications/publicationsearch.asp](http://www.statssa.gov.za/publications/publicationsearch.asp).

**Relative standard error** Data presented in this publication are based on information obtained from a sample and are, therefore, subject to sampling variability; that is, they may differ from the figures that would have been produced if the data had been obtained from all enterprises in the tourist accommodation industry in South Africa.

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of enterprises was used. The relative standard error (RSE) provides an immediate indication of the percentage errors likely to have occurred due to sampling, and thus avoids the need to refer to the size of the estimate.

**Non-sampling errors** Inaccuracies may occur because of imperfections in reporting by enterprises and errors made in the collection and processing of the data. Inaccuracies of this kind are referred to as non-sampling errors. Every effort is made to minimise non-sampling errors by careful design of questionnaires, testing them in pilot studies, editing reported data and implementing efficient operating procedures. Non-sampling errors occur in both sample surveys and censuses.

**Revised figures** Revised figures are due to respondents reporting revisions or corrections to their figures and late submission of their data to Stats SA. Figures for the last twelve months will be regarded as preliminary.

**Seasonal adjustment** Seasonally adjusted estimates will not be published until there are sufficient data points for the new survey. As soon as sufficient data points are available, Stats SA will consider publishing seasonally adjusted estimates.

<b>Symbols and abbreviations</b>	GDP	Gross Domestic Product
	IT	Income Tax
	SARS	South African Revenue Services
	SIC	Standard Industrial Classification of all Economic Activities
	Stats SA	Statistics South Africa
	VAT	Value added tax
	..	Figures not available
	*	Revised figures

**Comparability with previously published information** The information in this statistical release and the discontinued monthly Hotels' Trading Statistics statistical release is not strictly comparable.

The Hotels' Trading Statistics survey was conducted using a list of all hotels graded by the then South African Tourism Board (Satour) when the grading of hotels was still compulsory by law. This survey is conducted from a sample drawn from a new business register of **all** enterprises registered for income tax (IT).

- The higher levels from the new survey can be mainly attributed to the following:
- The coverage of all types of tourist accommodation enterprises including hotels; and
  - The improved coverage of the new register, especially of small and micro enterprises.

## Glossary

<b>Employees</b>	Employees are those people employed by the business or organisation who received payment (in salaries, wages, commission, piece rates or payments in kind) for the last pay period of the reference month.
<b>Industry</b>	An industry is made up of enterprises engaged in the same or similar kinds of economic activity. Industries are defined in the <i>System of National Accounts (SNA)</i> in the same way as in the <i>Standard Industrial Classification of all Economic Activities, Fifth Edition, Report No. 09-90-02 of January 1993 (SIC)</i> .
<b>Enterprise</b>	An enterprise is a legal entity or a combination of legal units that includes and directly controls all functions necessary to carry out its production activities.
<b>Establishment</b>	An establishment is an enterprise or part of an enterprise that is situated in a single location and in which only a single (non-ancillary) productive activity is carried out or in which the principal productive activity accounts for most of the value added.
<b>Tourist accommodation</b>	Tourist accommodation is any facility that regularly (or occasionally) provides overnight accommodation for tourists.
<b>Tourist</b>	A person travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business or other purposes.
<b>Other accommodation</b>	Includes lodges, bed and breakfast, self-catering establishments and other.
<b>Income from accommodation</b>	Refers only to amounts charged for rooms or equivalent. Income from meals is excluded.
<b>Income from restaurants and bar sales</b>	Refers to income from meals, banqueting and liquor and tobacco sales. Room income is excluded.
<b>Other income</b>	Other income includes rentals and fees received for transport services, offices, shops, garages, billiard rooms, dance floors, laundry services, telephone and fax, etc.
<b>Total income</b>	Includes income from accommodation, income from restaurant and bar sales and other income.
<b>Income per stay unit night sold</b>	Refers to average rate per stay unit.
<b>Occupancy rate</b>	The number of stay unit nights sold, divided by the product of the number of room nights available and the number of days in the survey period, expressed as a percentage.
<b>Stay unit</b>	The unit of accommodation available to be charged out to guests, for example, a powered site in a caravan park or a room in a hotel.
<b>Stay unit nights sold</b>	The total number of stay units occupied on each night during the survey period.

## General information

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