



# **Tourist accommodation**

## **March 2005**

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**Table A - Key findings as at the end of March 2005**

<b>Estimates</b>	<b>October 2004 to December 2004</b>	<b>January 2005 to March 2005</b>	<b>Percentage change (%)</b>
Stay units available ('000)	100,0	100,9	0,9
Stay unit nights sold ('000)	4 594,7	4 568,0	-0,6
Occupancy rate (%)	49,9	50,3	0,8
Average income per stay unit night sold (Rand)	433,17	438,97	1,34
Total income from accommodation (R million)	1 990,3	2 005,2	0,7

**Key findings as at the end of March 2005**

**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.

**Total income from accommodation increases**

In the first quarter of 2005, income from accommodation was R2 005,2 million. This was due to an increase of 0,7% (R 14,9 million) from the last quarter of 2004.

**Number of stay unit nights sold decreases**

The number of stay unit nights sold during the first quarter of 2005 decreased by 0,6% (from 4 594 700 to 4 568 000) compared with the last quarter of 2004. This decrease could be due to the fewer number of calendar days in the first quarter of 2005 (90 days) compared to the last quarter of 2004 (92 days).

**Occupancy rate increases**

The occupancy rate for the first quarter of 2005 (50,3%) increased by 0,8% compared with the last quarter of 2004 (49,9%).

**Notes**

<b>Forthcoming issue</b>	<b>Issue</b> June 2005	<b>Expected release date</b> 08 September 2005
<b>Purpose of the survey</b>	<p>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.</p> <p>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.</p>	
<b>Response rate</b>	<p>The average response rate on tourist accommodation for the first quarter of 2005 was 73.0%.</p>	

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**Table 1: Summary of tourist accommodation statistics**

Accommodation type	Month and Year						
	September 2004	October 2004	November 2004	December 2004	January 2005	February 2005	March 2005
<b>Hotels</b>							
Stay units available ('000)	47,9	47,8	46,6	46,8	46,9	47,9	47,9
Stay unit nights sold ('000)	891,2	925,2	930,1	810,8	802,3	911,7	999,2
Occupancy rate (%)	62,0	62,4	66,5	55,9	55,2	68,0	67,3
Average income per stay unit night sold (Rand)	452,87	480,44	480,70	524,54	542,81	513,44	486,09
Total income from accommodation sold(R million)	403,6	444,5	447,1	425,3	435,5	468,1	485,7
Income from restaurant and bar sales (R million)	182,4	201,8	208,3	218,7	179,1	192,7	203,7
Other income (R million)	38,3	47,2	44,7	43,0	38,1	43,6	45,0
Total income (R million)	624,3	693,5	700,1	687,0	652,7	704,4	734,4
<b>Caravan parks and camping sites</b>							
Stay units available ('000)	10,5	10,5	10,7	10,7	11,0	10,8	11,0
Stay unit nights sold ('000)	48,3	42,4	45,0	149,5	65,7	51,7	72,2
Occupancy rate (%)	15,3	13,0	14,0	45,1	19,3	17,1	21,2
Average income per stay unit night sold (Rand)	175,98	167,45	173,33	216,05	168,95	141,20	193,91
Total income from accommodation sold(R million)	8,5	7,1	7,8	32,3	11,1	7,3	14,0
Income from restaurant and bar sales (R million)	3,3	2,6	2,7	3,3	2,7	2,1	3,2
Other income (R million)	1,0	1,5	1,6	1,5	1,8	1,2	1,1
Total income (R million)	12,8	11,2	12,1	37,1	15,6	10,6	18,3
<b>Guest-houses and guest-farms</b>							
Stay units available ('000)	7,8	8,0	7,8	8,0	9,4	10,0	9,9
Stay unit nights sold ('000)	96,2	109,1	117,6	133,2	96,2	162,1	219,9
Occupancy rate (%)	41,1	44,0	50,3	53,7	33,0	57,9	71,7
Average income per stay unit night sold (Rand)	386,69	443,63	440,48	464,71	598,75	329,43	264,21
Total income from accommodation sold(R million)	37,2	48,4	51,8	61,9	57,6	53,4	58,1
Income from restaurant and bar sales (R million)	9,6	12,4	13,1	11,6	11,7	13,4	9,2
Other income (R million)	8,0	9,6	9,5	6,4	6,2	4,4	4,3
Total income (R million)	54,8	70,4	74,4	79,9	75,5	71,2	71,6
<b>Other accommodation</b>							
Stay units available ('000)	33,9	34,8	34,4	33,9	33,5	32,2	32,2
Stay unit nights sold ('000)	397,5	408,8	425,5	497,5	435,7	333,4	417,9
Occupancy rate (%)	39,1	37,9	41,2	47,3	42,0	37,0	41,9
Average income per stay unit night sold (Rand)	304,40	352,98	342,42	349,95	340,37	359,03	350,32
Total income from accommodation sold(R million)	121,0	144,3	145,7	174,1	148,3	119,7	146,4
Income from restaurant and bar sales (R million)	27,0	31,2	32,1	30,3	22,3	34,3	32,7
Other income (R million)	29,6	34,1	30,3	34,2	26,1	26,3	31,5
Total income (R million)	177,6	209,6	208,1	238,6	196,7	180,3	210,6
<b>Total</b>							
Stay units available ('000)	100,1	101,1	99,5	99,4	100,8	100,9	101,0
Stay unit nights sold ('000)	1 433,2	1 485,5	1 518,2	1 591,0	1 399,9	1 458,9	1 709,2
Occupancy rate (%)	47,7	47,4	50,9	51,6	44,8	51,6	54,6
Average income per stay unit night sold (Rand)	397,92	433,73	429,72	435,95	466,10	335,77	323,63
Total income from accommodation sold(R million)	570,3	644,3	652,4	693,6	652,5	648,5	704,2
Income from restaurant and bar sales (R million)	222,3	248,0	256,2	263,9	215,8	242,5	248,8
Other income (R million)	76,9	92,4	86,1	85,1	72,2	75,5	81,9
Total income (R million)	869,5	984,7	994,7	1 042,6	940,5	966,5	1 034,9

**Notes**

1. Figures for the last twelve months are regarded as 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. Entire Easter holidays were in March 2005.

**Table 2: Percentage change in tourist accommodation statistics from October 2004 to March 2005**

Accommodation type	Month and Year					
	October 2004	November 2004	December 2004	January 2005	February 2005	March 2005
<b>Hotels</b>						
Stay units available	-0,2	-2,5	0,4	0,2	2,1	0,0
Stay unit nights sold	3,8	0,5	-12,8	-1,0	13,6	9,6
Occupancy rate	0,6	6,6	-16,0	-1,3	23,2	-1,0
Average income per stay unit night sold	6,1	0,1	9,1	3,5	-5,4	-5,3
Total income from accommodation sold	10,1	0,6	-4,9	2,4	7,5	3,8
Income from restaurants and bar sales	10,6	3,2	5,0	-18,1	7,6	5,7
Other income	23,2	-5,3	-3,8	-11,4	14,4	3,2
Total income	11,1	1,0	-1,9	-5,0	7,9	4,3
<b>Caravan parks and Camping sites</b>						
Stay units available	0,0	1,9	0,0	2,8	-1,8	1,9
Stay unit nights sold	-12,2	6,1	232,2	-56,1	-21,3	39,7
Occupancy rate	-15,0	7,7	222,1	-57,2	-11,4	24,0
Average income per stay unit night sold	-4,8	3,5	24,6	-21,8	-16,4	37,3
Total income from accommodation sold	-16,5	9,9	314,1	-65,6	-34,2	91,8
Income from restaurants and bar sales	-21,2	3,8	22,2	-18,2	-22,2	52,4
Other income	50,0	6,7	-6,3	20,0	-33,3	-8,3
Total income	-12,5	8,0	206,6	-58,0	-32,1	72,6
<b>Guest-houses and guest-farms</b>						
Stay units available	2,6	-2,5	2,6	17,5	6,4	-1,0
Stay unit nights sold	13,4	7,8	13,3	-27,8	68,5	35,7
Occupancy rate	7,1	14,3	6,8	-38,5	75,5	23,8
Average income per stay unit night sold	14,7	-0,7	5,5	28,8	-45,0	-19,8
Total income from accommodation sold	30,1	7,0	19,5	-6,9	-7,3	8,8
Income from restaurants and bar sales	29,2	5,6	-11,5	0,9	14,5	-31,3
Other income	20,0	-1,0	-32,6	-3,1	-29,0	-2,3
Total income	28,5	5,7	7,4	-5,5	-5,7	0,6
<b>Other accommodation</b>						
Stay units available	2,7	-1,1	-1,5	-1,2	-3,9	0,0
Stay unit nights sold	2,8	4,1	16,9	-12,4	-23,5	25,3
Occupancy rate	-3,1	8,7	14,8	-11,2	-11,9	13,2
Average income per stay unit night sold	16,0	-3,0	2,2	-2,7	5,5	-2,4
Total income from accommodation sold	19,3	1,0	19,5	-14,8	-19,3	22,3
Income from restaurants and bar sales	15,6	2,9	-5,6	-26,4	53,8	-4,7
Other income	15,2	-11,1	12,9	-23,7	0,8	19,8
Total income	18,0	-0,7	14,7	-17,6	-8,3	16,8
<b>Total</b>						
Stay units available	1,0	-1,6	-0,1	1,4	0,1	0,1
Stay unit nights sold	3,6	2,2	4,8	-12,0	4,2	17,2
Occupancy rate	-0,6	7,4	1,4	-13,2	15,2	5,8
Average income per stay unit night sold	9,0	-0,9	1,5	6,9	-28,0	-3,6
Total income from accommodation sold	13,0	1,3	6,3	-5,9	-0,6	8,6
Income from restaurants and bar sales	11,6	3,3	3,0	-18,2	12,4	2,6
Other income	20,2	-6,8	-1,2	-15,2	4,6	8,5
Total income	13,2	1,0	4,8	-9,8	2,8	7,1

**Note:** The percentage change is the change in tourist accommodation statistics of the relevant month compared with tourist accommodation statistics of the previous month expressed as a percentage.

## 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 March 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>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>Total 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>Average income per stay unit night sold</b>	Refers to average rate per stay unit i.e. rate per room in a hotel or powered site in a caravan park. The total income from accommodation divided by the number of stay units sold in the survey period multiplied by 1000.
<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>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>Other accommodation</b>	Includes lodges, bed and breakfast, self-catering establishments and other.
<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>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.
<b>Total income</b>	Includes income from accommodation, income from restaurant and bar sales and other income.
<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.

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