



Tourist accommodation

September 2005

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Table A - Key findings as at the end of September 2005

Estimates	September 2004	September 2005	% change between September 2004 and September 2005	July 2005 to September 2005	% change between April 2005 to June 2005 and July 2005 to September 2005
Stay units available ('000)	97,9	96,9	-1,0	96,8	+0,6
Stay unit nights sold ('000)	1 429,4	1 479,8	+3,5	4 291,8	+6,3
Occupancy rate (%)	48,7	50,9	+4,6	48,2	+4,4
Average income per stay unit night sold (Rand)	398,14	430,80	+8,2	406,36	+5,2
Income from accommodation (R million)	569,1	637,5	+12,0	1 744,0	+11,9

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.

Key findings as at the end of September 2005

Number of stay unit nights sold increases

The number of stay units sold during September 2005 increased by 3,5% (from 1 429 400 to 1 479 800) compared to September 2004.

Furthermore, the number of stay unit nights sold during the third quarter of 2005 increased by 6,3% (from 4 035 700 to 4 291 800) compared with the second quarter of 2005. This increase could be partly due to the mid-year school vacation in July and the higher number of foreign tourist arrivals to South Africa during August and September annually.

Occupancy rate increases

The occupancy rate in September 2005 (50,9%) increased by 4,6% compared with September 2004 (48,7%).

Furthermore, the occupancy rate for the third quarter of 2005 (48,2%) increased by 4,4% compared with the second quarter of 2005 (46,1%).

Total income from accommodation increases

In September 2005, income from accommodation was R637,5 million. This was an increase of 12,0 % (R68,4 million) compared with September 2004.

Furthermore, income from accommodation in the third quarter increased by of 11,9% (R184,9 million) compared with the second quarter of 2005. This increase could be partly due to an increase in the 'average income per stay unit night sold' and an increase in the 'number of stay unit nights sold' in the third quarter compared to the second quarter.

Notes

Forthcoming issue	Issue December 2005	Expected release date 09 March 2006
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 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.	
Response rate	The average response rate on tourist accommodation for the third quarter of 2005 was 74,6%.	

P J Lehohla
Statistician-General

Table 1: Summary of tourist accommodation statistics

Accommodation type	Month and Year												
	Sept 2004	Oct 2004	Nov 2004	Dec 2004	Jan 2005	Feb 2005	Mar 2005	Apr 2005	May 2005	Jun 2005	July 2005	Aug 2005	Sept 2005
Hotels													
Stay units available ('000)	47,9	47,8	46,0	46,2	46,5	47,8	47,8	48,4	48,4	48,8	48,0	46,6	47,5
Stay unit nights sold ('000)	891,2	925,2	921,0	802,6	796,0	897,6	978,2	903,6	837,4	845,7	882,3	865,7	902,9
Occupancy rate (%)	62,0	62,4	66,7	56,0	55,2	67,1	66,0	62,2	55,8	57,8	59,3	59,9	63,4
Income per stay unit nights sold (Rand)	452,9	480,4	482,2	525,9	544,1	516,7	492,3	461,2	447,9	425,9	440,4	471,1	516,9
Income from accommodation (R million)	403,6	444,5	444,1	422,1	433,1	463,8	481,6	416,7	375,1	360,2	388,6	407,8	466,7
Income from restaurant and bar sales (R million)	182,4	201,8	206,1	215,9	177,1	192,7	200,4	194,5	179,6	175,9	171,5	186,0	190,3
Other income (R million)	38,3	47,2	44,7	43,0	38,3	43,1	45,0	39,8	39,2	37,3	46,3	61,3	66,8
Total income (R million)	624,3	693,5	694,9	681,0	648,5	699,6	727,0	651,0	593,9	573,4	606,4	655,1	723,8
Caravan parks and camping sites													
Stay units available ('000)	11,0	11,0	11,0	11,0	11,4	11,2	11,1	10,1	10,1	10,1	10,3	10,1	10,2
Stay unit nights sold ('000)	50,4	42,9	45,6	150,2	66,2	55,7	78,5	43,5	29,6	31,7	55,5	47,5	47,5
Occupancy rate (%)	15,3	12,6	13,8	44,0	18,7	17,8	22,8	14,4	9,5	10,5	17,4	15,2	15,5
Income per stay unit nights sold (Rand)	172,6	170,2	177,6	213,0	166,2	147,2	198,7	183,9	192,6	176,7	113,5	122,1	168,4
Income from accommodation (R million)	8,7	7,3	8,1	32,0	11,0	8,2	15,6	8,0	5,7	5,6	6,3	5,8	8,0
Income from restaurant and bar sales (R million)	3,3	2,5	2,7	3,3	2,7	1,5	3,1	2,3	1,2	1,2	1,6	1,8	2,6
Other income (R million)	1,0	1,4	1,6	1,5	1,7	1,0	1,1	1,1	1,2	0,8	0,8	1,4	1,4
Total income (R million)	13,0	11,2	12,4	36,8	15,4	10,7	19,8	11,4	8,1	7,6	8,7	9,0	12,0
Guest-houses and guest-farms													
Stay units available ('000)	7,8	8,0	7,8	8,0	9,4	9,8	9,8	9,6	9,4	9,5	9,8	9,6	9,6
Stay unit nights sold ('000)	96,2	109,1	117,6	133,2	152,6	156,8	213,5	140,2	121,4	116,1	132,4	146,3	172,1
Occupancy rate (%)	41,1	44,0	50,3	53,7	52,4	57,1	70,3	48,7	41,7	40,7	43,6	49,2	59,8
Income per stay unit nights sold (Rand)	386,7	443,6	440,5	464,7	377,5	332,3	269,3	328,1	273,5	255,8	260,6	321,9	236,5
Income from accommodation (R million)	37,2	48,4	51,8	61,9	57,6	52,1	57,5	46,0	33,2	29,7	34,5	47,1	40,7
Income from restaurant and bar sales (R million)	9,6	12,4	13,1	11,6	11,7	13,3	9,4	9,9	7,1	8,4	10,0	9,4	10,9
Other income (R million)	8,0	9,6	9,5	6,4	6,2	4,4	4,3	5,1	5,5	6,8	6,3	9,2	6,3
Total income (R million)	54,8	70,4	74,4	79,9	75,5	69,8	71,2	61,0	45,8	44,9	50,8	65,7	57,9
Other accommodation													
Stay units available ('000)	31,2	31,7	31,2	30,7	30,5	29,0	29,0	28,6	28,6	27,3	29,8	29,4	29,6
Stay unit nights sold ('000)	391,6	401,1	418,9	479,9	424,8	337,0	421,6	344,1	312,2	310,2	346,8	335,5	357,3
Occupancy rate (%)	41,8	40,8	44,8	50,4	44,9	41,5	46,9	40,1	35,2	37,9	37,5	36,8	40,2
Income per stay unit nights sold (Rand)	305,4	357,8	344,2	355,3	343,0	353,1	366,7	295,0	292,4	277,6	311,1	323,4	341,7
Income from accommodation (R million)	119,6	143,5	144,2	170,5	145,7	119,0	154,6	101,5	91,3	86,1	107,9	108,5	122,1
Income from restaurant and bar sales (R million)	27,5	31,7	32,4	30,7	22,5	32,3	33,3	27,5	25,1	27,5	21,3	24,0	23,7
Other income (R million)	28,0	32,6	28,1	32,8	24,3	24,9	31,3	22,7	19,1	19,0	20,3	22,8	28,0
Total income (R million)	175,1	207,8	204,7	234,0	192,5	176,2	219,2	151,7	135,5	132,6	149,5	155,3	173,8
Total													
Stay units available ('000)	97,9	98,5	96,0	95,9	97,8	97,8	97,7	96,7	96,5	95,7	97,9	95,7	96,9
Stay unit nights sold ('000)	429,4	478,3	503,1	565,9	439,6	447,1	691,8	431,4	300,6	303,7	417,0	395,0	479,8
Occupancy rate (%)	48,7	48,4	52,2	52,7	47,5	52,8	55,9	49,3	43,5	45,4	46,7	47,0	50,9
Income per stay unit nights sold (Rand)	398,1	435,4	431,2	438,4	449,7	444,4	419,3	399,7	388,5	369,4	379,2	408,0	430,8
Income from accommodation (R million)	569,1	643,7	648,2	686,5	647,4	643,1	709,3	572,2	505,3	481,6	537,3	569,2	637,5
Income from restaurant and bar sales (R million)	222,8	248,4	254,3	261,5	214,0	239,8	246,2	234,2	213,0	213,0	204,4	221,2	227,5
Other income (R million)	75,3	90,8	83,9	83,7	70,5	73,4	81,7	68,7	65,0	63,9	73,7	94,7	102,5
Total income (R million)	867,2	982,9	986,4	1031,7	931,9	956,3	1037,2	875,1	783,3	758,5	815,4	885,1	967,5

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.

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

Accommodation type	Month and Year											
	Oct 2004	Nov 2004	Dec 2004	Jan 2005	Feb 2005	Mar 2005	Apr 2005	May 2005	Jun 2005	July 2005	Aug 2005	Sept 2005
Hotels												
Stay units available	-0,2	-3,8	0,4	0,6	2,8	0,0	1,3	0,0	0,8	-1,6	-2,9	1,9
Stay unit nights sold	3,8	-0,5	-12,9	-0,8	12,8	9,0	-7,6	-7,3	1,0	4,3	-1,9	4,3
Occupancy rate	0,7	6,9	-16,0	-1,5	21,5	-1,6	-5,7	-10,3	3,5	2,6	1,1	5,7
Income per stay unit night sold	6,1	0,4	9,1	3,5	-5,0	-4,7	-6,3	-2,9	-4,9	3,4	7,0	9,7
Income from accommodation	10,1	-0,1	-5,0	2,6	7,1	3,8	-13,5	-10,0	-4,0	7,9	4,9	14,4
Income from restaurants and bar sales	10,6	2,1	4,8	-18,0	8,8	4,0	-2,9	-7,7	-2,1	-2,5	8,5	2,3
Other income	23,2	-5,3	-3,8	-10,9	12,5	4,4	-11,6	-1,5	-4,8	24,1	32,4	9,0
Total income	11,1	0,2	-2,0	-4,8	7,9	3,9	-10,5	-8,8	-3,5	5,8	8,0	10,5
Caravan Parks and Camping sites												
Stay units available	0,0	0,0	0,0	3,6	-1,8	-0,9	-9,0	0,0	0,0	2,0	-1,9	1,0
Stay unit nights sold	-14,9	6,3	229,4	-55,9	-15,9	40,9	-44,6	-32,0	7,1	75,1	-14,4	0,0
Occupancy rate	-17,6	9,8	218,8	-57,5	-5,2	28,4	-37,1	-34,1	10,7	66,1	-12,7	2,3
Income per stay unit night sold	-1,4	4,4	19,9	-22,0	-11,4	35,0	-7,5	4,7	-8,3	-35,7	7,6	37,9
Income from accommodation	-16,1	11,0	295,1	-65,6	-25,5	90,2	-48,7	-28,8	-1,8	12,5	-7,9	37,9
Income from restaurants and bar sales	-24,2	8,0	22,2	-18,2	-44,4	106,7	-25,8	-47,8	0,0	33,3	12,5	44,4
Other income	40,0	14,3	-6,3	13,3	-41,2	10,0	0,0	9,1	-33,3	0,0	75,0	0,0
Total income	-13,8	10,7	196,8	-58,2	-30,5	85,0	-42,4	-28,9	-6,2	14,5	3,4	33,3
Guest-houses and guest-farms												
Stay units available	2,6	-2,5	2,6	17,5	4,3	0,0	-2,0	-2,1	1,1	3,2	-2,0	0,0
Stay unit nights sold	13,4	7,8	13,3	14,6	2,8	36,2	-34,3	-13,4	-4,4	14,0	10,5	17,6
Occupancy rate	7,0	14,2	6,9	-2,5	9,1	23,0	-30,7	-14,4	-2,2	7,0	12,8	21,6
Income per stay unit night sold	14,7	-0,7	5,5	-18,8	-12,0	-18,9	21,8	-16,6	-6,5	1,9	23,6	-26,5
Income from accommodation	30,1	7,0	19,5	-6,9	-9,5	10,4	-20,0	-27,8	-10,5	16,2	36,5	-13,6
Income from restaurants and bar sales	29,2	5,6	-11,5	0,9	13,7	-29,3	5,3	-28,3	18,3	19,0	-6,0	16,0
Other income	20,0	-1,0	-32,6	-3,1	-29,0	-2,3	18,6	7,8	23,6	-7,4	46,0	-31,5
Total income	28,5	5,7	7,4	-5,5	-7,5	2,0	-14,3	-24,9	-2,0	13,1	29,3	-11,9
Other accommodation												
Stay units available	1,6	-1,6	-1,6	-0,7	-4,9	0,0	-1,4	0,0	-4,5	9,2	-1,3	0,7
Stay unit nights sold	2,4	4,4	14,6	-11,5	-20,7	25,1	-18,4	-9,3	-0,6	11,8	-3,3	6,5
Occupancy rate	-2,4	9,6	12,7	-10,9	-7,6	13,0	-14,5	-12,2	7,6	-0,9	-1,9	9,3
Income per stay unit night sold	17,1	-3,8	3,2	-3,5	3,0	3,8	-19,6	-0,9	-5,1	12,1	3,9	5,7
Income from accommodation	20,0	0,5	18,2	-14,5	-18,3	29,9	-34,3	-10,0	-5,7	25,3	0,6	12,5
Income from restaurants and bar sales	15,3	2,2	-5,2	-26,7	43,6	3,1	-17,4	-8,7	9,6	-22,5	12,7	-1,3
Other income	16,4	-13,8	16,7	-25,9	2,5	25,7	-27,5	-15,9	-0,5	6,8	12,3	22,8
Total income	18,7	-1,5	14,3	-17,7	-8,5	24,4	-30,8	-10,7	-2,1	12,7	3,9	11,9
Total												
Stay units available	0,6	-2,5	-0,1	2,0	0,0	-0,1	-1,0	-0,2	-0,8	2,3	-2,2	1,3
Stay unit nights sold	3,4	1,7	4,2	-8,1	0,5	16,9	-15,4	-9,1	0,2	8,7	-1,6	6,1
Occupancy rate	-0,5	7,8	0,9	-9,9	11,3	5,7	-11,7	-11,9	4,4	2,8	0,7	8,3
Income per stay unit night sold	9,4	-1,0	1,7	2,6	-1,2	-5,7	-4,7	-2,8	-4,9	2,6	7,6	5,6
Income from accommodation	13,1	0,7	5,9	-5,7	-0,7	10,3	-19,3	-11,7	-4,7	11,6	5,9	12,0
Income from restaurants and bar sales	11,5	2,4	2,8	-18,2	12,1	2,7	-4,9	-9,1	0,0	-4,0	8,2	2,8
Other income	20,6	-7,6	-0,2	-15,8	4,1	11,3	-15,9	-5,4	-1,7	15,3	28,5	8,2
Total income	13,3	0,4	4,6	-9,7	2,6	8,5	-15,6	-10,5	-3,2	7,5	8,5	9,3

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.

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.

Symbols and abbreviations	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

Enterprise	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.
Establishment	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.
Total income from accommodation	Refers only to amounts charged for rooms or equivalent. Income from meals is excluded.
Income from restaurants and bar sales	Refers to income from meals, banqueting and liquor and tobacco sales. Room income is excluded.
Average income per stay unit night sold	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.
Industry	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> .
Occupancy rate	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.
Other accommodation	Includes lodges, bed and breakfast, self-catering establishments and other.
Other income	Other income includes rentals and fees received for transport services, offices, shops, garages, billiard rooms, dance floors, laundry services, telephone and fax, etc.
Stay unit	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.
Stay unit nights sold	The total number of stay units occupied on each night during the survey period.
Total income	Includes income from accommodation, income from restaurant and bar sales and other income.
Tourist	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.

General information

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