Tourist accommodation and Food and beverages surveys

Statistics South Africa
12 June 2008
Current surveys in Stats SA

Sub-annual survey

“used for monitoring short term trends”

- Tourist Accommodation – September 2004
- Food & Beverages statistics – August 2005

Collected monthly and published quarterly with plans to be published monthly in future

Periodic Large Sample Surveys

“used mainly for measuring structural changes at a detailed industry level including product details”

- Tourist Accommodation – 2004 and 2007
- Food & Beverages statistics – 2007

Collected on a periodic (3 or 4 years) basis for a particular year and published within 18 months of the reference period – improved to 12 months
Frame – tax registered private and public enterprises engaged in:

a) providing short-stay commercial accommodation
   - Hotels,
   - Caravan parks and camping sites,
   - Guest-houses and guest-farms, and
   - Other accommodation.

b) providing food and beverages for immediate consumption
   - Restaurants and coffee shops,
   - Take-away outlets,
   - Caterers, and
   - Other catering services.

Sample – Stratification by turnover @ 5 digit SIC level (1993 ISIC Fifth Edition)
Tourist Accommodation – sub-annual

- Number of stay units available,
- Number of stay unit nights sold,
- Income from accommodation,
- Income from restaurant and bars,
- Other income,
- Total income.

Food and Beverages – sub-annual

- Income from food sales,
- Income from bar sales,
- Other income,
- Total income.

All items are split by type of accommodation as indicated under scope.

All items are split by type of outlet as indicated under scope.
Tourist Accommodation and Food and Beverages – periodic

Coverage similar to the sub-annual surveys, but with the following generic financial variables:

- Trading income
- Expenditure
- Profit or loss
- Inventories
- Employment
Tourist accommodation

Overseas travellers on holiday (P0351) vs. income from accommodation (P6410)

250 000

Overseas Arrivals - Holidays

2 200

Overseas travellers on holiday (P0351) vs. income from accommodation (P6410)

200 000

Overseas Arrivals - Holidays

1 400

1 600

1 800

2 000

Inc Accommodation (R million)

100 000

50 000

150 000

200 000

250 000

Sep-04 Dec-04 Mar-05 Jun-05 Sep-05 Dec-05 Mar-06 Jun-06 Sep-06 Dec-06 Mar-07 Jun-07 Sep-07 Dec-07 Mar-08

61% correlation
Tourist accommodation

Percentage contribution to the total income by enterprise type – Periodic and sub-annual

<table>
<thead>
<tr>
<th>Enterprise type</th>
<th>LSS 2004 (R million)</th>
<th>% contribution</th>
<th>January to March 2008 (R million)</th>
<th>% contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotels</td>
<td>11 303,0</td>
<td>79,0</td>
<td>2 309,9</td>
<td>68,2</td>
</tr>
<tr>
<td>Caravan parks and camping sites</td>
<td>173,0</td>
<td>1,2</td>
<td>36,2</td>
<td>1,1</td>
</tr>
<tr>
<td>Guest-houses and guest-farms</td>
<td>727,0</td>
<td>5,1</td>
<td>303,5</td>
<td>9,0</td>
</tr>
<tr>
<td>Other accommodation</td>
<td>2 101,0</td>
<td>14,7</td>
<td>736,5</td>
<td>21,8</td>
</tr>
<tr>
<td>Total industry</td>
<td>14 304,0</td>
<td>100,0</td>
<td>3 386,1</td>
<td>100,0</td>
</tr>
</tbody>
</table>
Food and beverages – Sub-annual

CPI (Food) and percentage change in Total income – August 2006 to March 2008
### Food and beverages – Sub-annual

<table>
<thead>
<tr>
<th>Enterprise type</th>
<th>January to March 2008 (R million)</th>
<th>% contribution of enterprise types to the total income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants and coffee shops</td>
<td>3 969,9</td>
<td>52,0</td>
</tr>
<tr>
<td>Take-away outlets</td>
<td>2 116,7</td>
<td>27,8</td>
</tr>
<tr>
<td>Caterers</td>
<td>1 096,5</td>
<td>14,4</td>
</tr>
<tr>
<td>Other catering services</td>
<td>444,5</td>
<td>5,8</td>
</tr>
<tr>
<td>Total industry</td>
<td>7 627,6</td>
<td>100,0</td>
</tr>
</tbody>
</table>
Shortcomings and challenges

- Lack of provincial breakdown
- Movement from quarterly to monthly publication
  - Concerns on the quality of the business register information – particularly as it relates to the small and micro enterprises
- Need to develop tourism based business register e.g. star based
- Limited effort put on marketing and related stakeholder interactions
- Getting a proper balance on effort given to both the financial and product information
THANK YOU