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Personal services industry, 2018

1. Introduction

1.1 Aim and collection unit

This publication presents estimates in respect of the personal services industry, 2018. The survey aims to provide financial, production, employment and related information for the personal services industry in South Africa.

The last survey was conducted in 2008 (Report No. 90-01-01 (2008)).

The statistical unit for the collection of information is an enterprise. An enterprise is a legal unit (or a combination of legal units) that includes and directly controls all functions necessary to carry out its activities. Each enterprise is classified to an industry that reflects its predominant activity.

1.2 Scope and coverage

The 2018 personal services LSS covers enterprises registered in the taxation system that are mainly engaged in the following activities classified according to the January 1993 edition of the *Standard Industrial Classification of all Economic Activities (SIC), Fifth edition, Report No. 09-09-02*:

- Education services (9200)
- Hospital activities (9311)
- Medical and dental practice activities (9312)
- Other human health activities (9319)
- Veterinary activities (9320)
- Social work activities (9330)
- Sewage and refuse disposal, sanitary and similar activities (9400)
- Activities of business and employers' organisations (9511)
- Activities of professional organisations (9512)
- Activities of trade unions (9520)
- Activities of religious organisations (9591)
- Activities of political organisations (9592)
- Activities of other membership organisations n.e.c. (9599)
- Motion picture and video production and distribution (9611)
- Motion picture projections (9612)
- Radio and television activities (9613)
- Dramatic arts, music and other arts activities (9614)
- Other entertainment activities n.e.c. (9619)
- News agency activities (9620)
- Library and archives activities (9631)
- Museum activities and preservation of historical sites and buildings (9632)
- Botanical and zoological gardens and nature reserve activities (9633)
- Sporting activities (9641)
- Other recreational activities (9649)
- Washing and (dry-) cleaning of textiles and fur products (9901)
- Hairdressing and other beauty treatment (9902)

- Funeral and related activities (9903)
- Other service activities n.e.c. (9909)

1.3 Data items

The following categories of data items were collected: industrial classification, employment, trading income, expenditure, profit or loss, inventories, capital expenditure on new assets, sales, services, purchases, client base, salaries and wages, and information and communication technology.

N.B.: The 2018 figures are preliminary.

1.4 Reference period

The questionnaires were completed for the financial year ended on any date between 1 July 2017 and 30 June 2018, according to the usual reporting schedule of the enterprise, with the following exception:

- Employment as at 30 June 2018.

1.5 Current prices

The rand values are at current prices.

1.6 Reliability of data

All estimates compiled for this industry are subject to both sampling and non-sampling errors.

The estimates presented in this publication are subject to sampling variability since they are based on information obtained from a sample. That is, they might differ from the figures that would have been produced if the data had been obtained from all enterprises in the food and beverages 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 error likely to have occurred due to sampling, and thus avoids the need to refer to the size of the estimate. The larger the RSE, the less reliable the estimate. The following are some of the likely sources of non-sampling errors: sampling frame not up to date, wrong definitions and classification, phrasing of questions, non-response, processing and estimation. Every effort is made to minimise non-sampling errors by the 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.

1.7 Confidentiality

According to section 17 of the Statistics Act, 1999 (Act No. 6 of 1999), completed questionnaires remain confidential to Statistics South Africa (Stats SA). Individual business information is never disclosed. Results are presented in aggregated form only.

2. Summary of findings

2.1 Income

Table A – Income in the personal services industry, 2008 and 2018

Type of service	2008		2018	
	R million	% contribution	R million	% contribution
Education services	36 459	21,7	97 540	25,6
Health and social work	73 557	43,9	164 696	43,3
Sewage and refuse disposal, sanitary and similar activities	3 628	2,2	18 087	4,7
Activities of membership organisations	5 311	3,2	17 948	4,7
Recreational, cultural and sporting activities	42 504	25,4	75 990	20,0
Other service activities	6 181	3,7	6 520	1,7
Total	167 640	100,0	380 781	100,0

Source: Report No. 91-01-01

The total income for the personal services industry in 2018 was R380,8 billion. The total income represents an increase of 8,5% per annum over the income reported in the corresponding survey of 2008 (R167,6 billion). The largest contributor to the increase was 'health and social work' (+R91,1 billion), followed by 'education services' (R61,1 billion) and 'recreational, cultural and sporting activities' (+R33,5 billion).

Between 2008 and 2018, 'education services' gained the biggest percentage share (3,9 percentage points) in income from the personal services industry (from a percentage contribution of 21,7% in 2008 to 25,6% in 2018). 'Recreational, cultural and sporting activities' lost the biggest percentage share (-5,4 percentage points) over the same period (from 25,4% in 2008 to 20,0% in 2018).

Table B – Concentration ratio (relative contribution of large enterprises) in the personal services industry, 2018

Concentration ratio	2008	2018
	%	
CR5	17,9	14,2
CR10	25,7	22,2
CR20	35,8	32,8
CR50	46,5	45,5
CR100	51,5	51,9

In 2018, the top 100 enterprises in the personal services industry contributed 51,9% to the total income. The highest concentration ratio for the top 100 enterprises (CR100) in the two periods was 51,9% in 2018. The concentration ratios of the top 5, 10, 20, and 50 enterprises were the lowest in 2018 at 14,2%, 22,2%, 32,8% and 45,5%, respectively.

Table C – Profit margin in the personal services industry 2008 and 2018

Type of service	Net profit after tax		Turnover		Profit margin	
	2008	2018	2008	2018	2008	2018
	R million				%	
Education services						
Health and social work	5 255	7 626	38 777	95 083	13,6	8,0
Sewage and refuse disposal, sanitary and similar activities	251	1 774	3 411	17 324	7,4	10,2
Activities of membership organisations	289	1 325	3 223	13 839	9,0	9,6
Recreational, cultural and sporting activities	3 232	4 390	39 697	64 700	8,1	6,8
Other service activities	267	222	5 821	6 329	4,6	3,5
Total	9 294	15 337	90 929	197 275	10,2	7,8

Source: Report No. 91-01-01

The profit margin for the personal services industry in 2018 was 7,8%. The highest profit margin by type of service in 2018 was recorded for 'sewage and refuse disposal, sanitary and similar activities' (10,2%), followed by 'activities of membership organisations' (9,6%) and 'education services' (8,0%).

The highest profit margin in the two survey periods was 13,6% for 'health and social work' in 2008.

2.2 Employment

Table D – Employment in the personal services industry for the last pay period ended on or before 30 June, 2008 and 2018

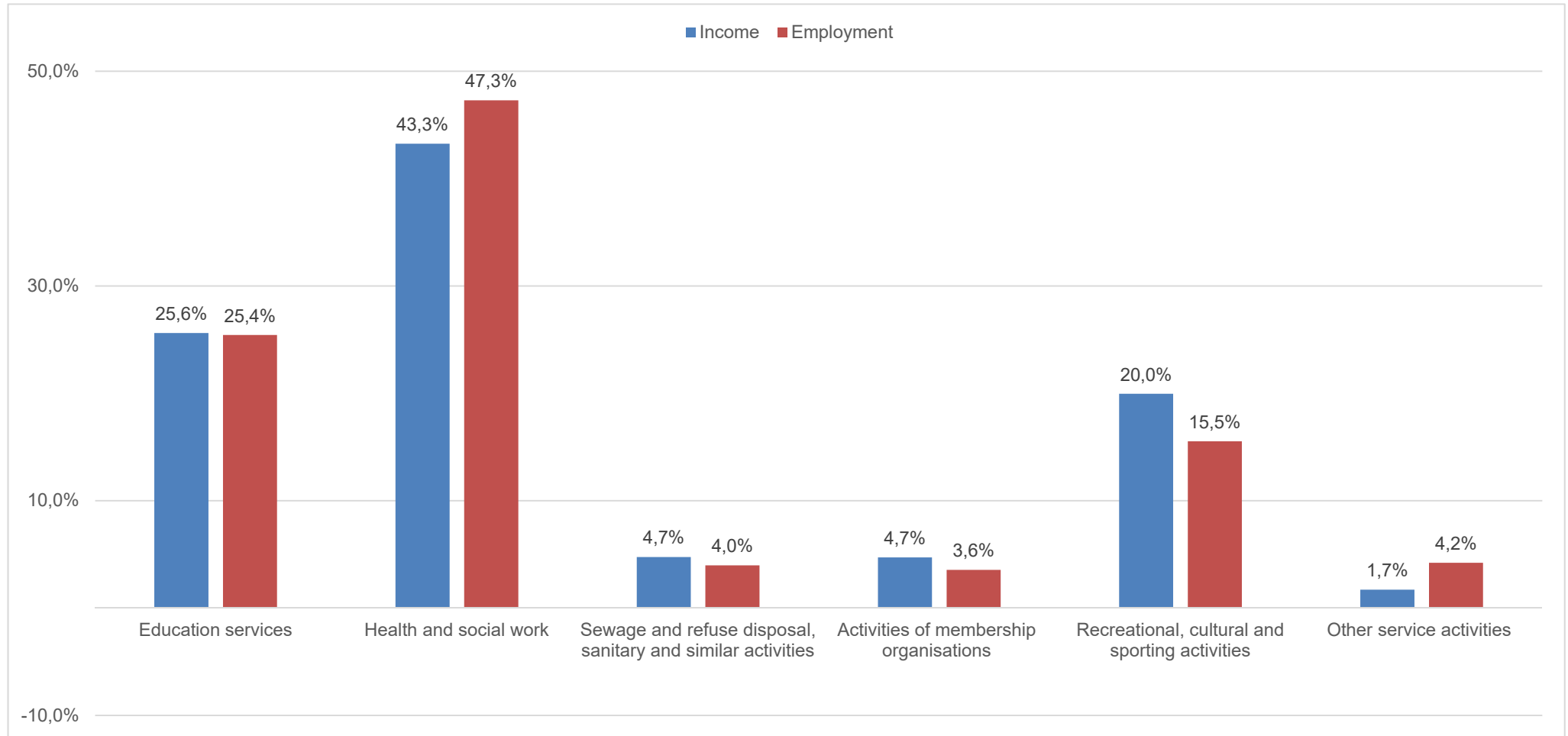
Type of service	2008		2018	
	Number	% contribution	Number	% contribution
Education services	96 027	19,8	126 484	25,4
Health and social work	229 798	47,4	235 147	47,3
Sewage and refuse disposal, sanitary and similar activities	8 735	1,8	19 785	4,0
Activities of membership organisations	15 594	3,2	17 684	3,6
Recreational, cultural and sporting activities	91 226	18,8	77 204	15,5
Other service activities	43 760	9,0	20 934	4,2
Total	485 140	100,0	497 238	100,0

Source: Report No. 91-01-01

The total number of persons employed in the personal services industry as at the end of June 2018 was 497 238. This represents an increase of 0,2% per annum over the employment recorded in 2008 (485 140 persons). 'Health and social work' employed the largest number of persons (235 147 or 47,3%), followed by 'education services' (126 484 or 25,4%) and 'recreational, cultural and sporting activities' (77 204 or 15,5%).

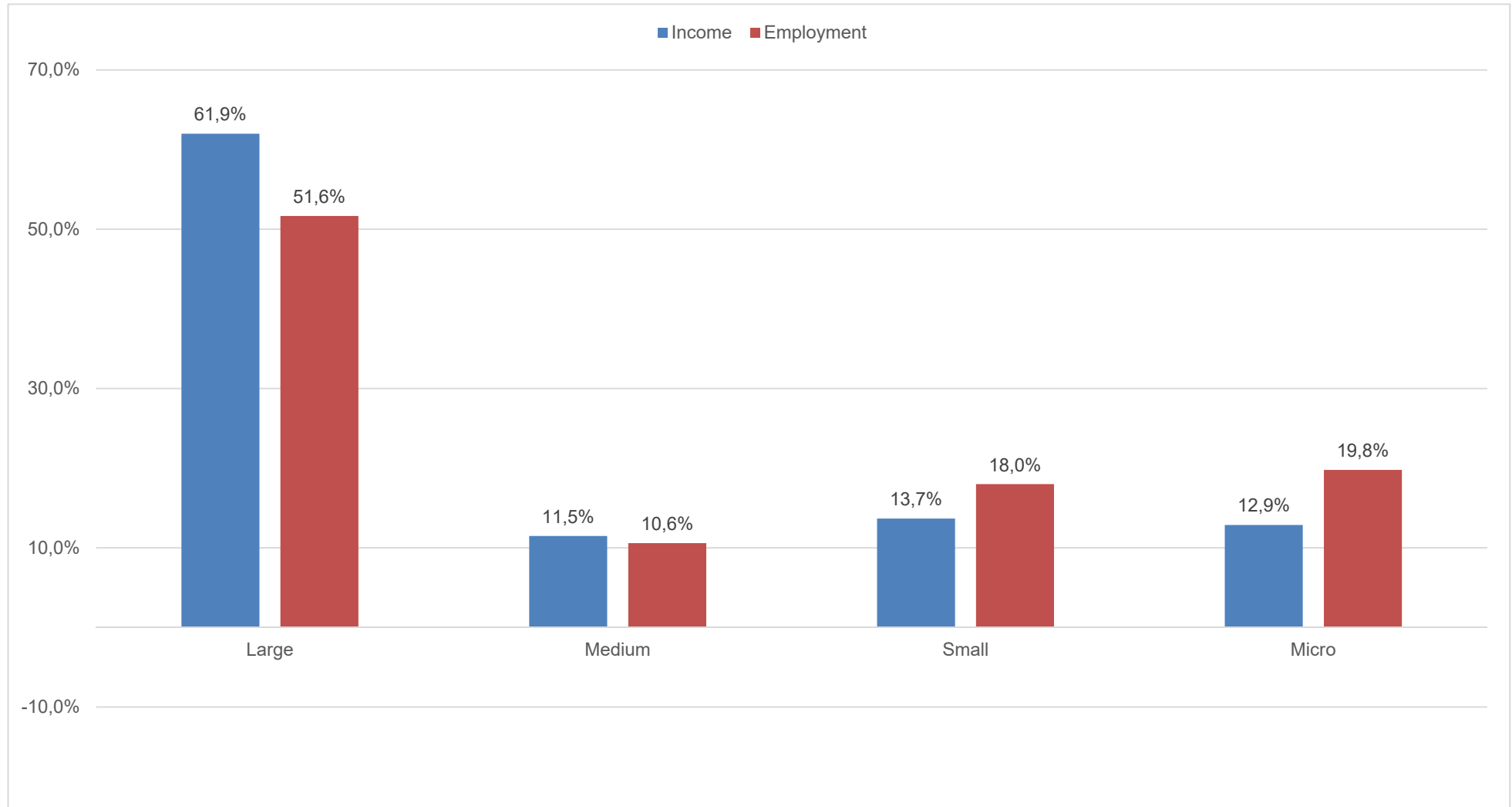
Employment increased from 485 140 in 2008 to 497 238 in 2018 (a gain of 12 098 jobs). The highest growth in employment between 2008 and 2018 was in 'education services' (+30 457), 'sewage and refuse disposal, sanitary and similar activities' (+11 050) and 'health and social work' (+5 349). Employment fell in 'recreational, cultural and sporting activities' (-14 022) and in 'other service activities' (-22 826).

Figure 1 – Income and employment by type of service (% contribution) in the personal services industry, 2018



The type of service with the highest proportion of employment compared with its proportion of income was 'other service activities' (contributing 4,2% of employment and 1,7% of income), followed by 'health and social work' (contributing 47,3% of employment and 43,3% of income).

Figure 2 – Income and employment by enterprise size (% contribution) in the personal services industry, 2018



Large enterprises (those with annual turnover greater than R192 million) contributed 61,9% to the total income of the personal services industry whereas their contribution to employment was 51,6%. Small, medium and micro enterprises (SMMEs) contributed 48,4% to total employment and 38,1% to total income.

Table E – Average salaries and wages in the personal services industry, 2008 and 2018

Type of service	2008			2018		
	Salaries and wages	Total employees	Average salaries and wages	Salaries and wages	Total employees	Average salaries and wages
	R million	Number	Rands	R million	Number	Rands
Education services	16 361	96 027	170 379	44 232	126 484	349 704
Health and social work	20 312	229 798	88 391	55 333	235 147	235 312
Sewage and refuse disposal, sanitary and similar activities	715	8 735	81 855	3 838	19 785	193 985
Activities of membership organisations	1 786	15 594	114 531	4 954	17 684	280 140
Recreational, cultural and sporting activities	6 885	91 226	75 472	14 658	77 204	189 861
Other service activities	1 994	43 760	45 567	1 900	20 934	90 761
Total	48 053	485 140	99 050	124 915	497 238	251 218

The average salaries and wages in the personal services industry in 2018 was R251 218. The type of service with the highest average salaries and wages in 2018 was 'education services' (R349 704), followed by 'activities of membership organisations' (R280 140) and 'health and social work' (R235 312). The type of service with the lowest average salaries and wages in 2018 was 'other services activities' (R90 761).

Total average salaries and wages increased from R99 050 in 2008 to R251 218 in 2018, an annualised growth rate of 9,8%.

2.3 Capital expenditure on new assets

Table F – Capital expenditure on new assets in the personal services industry, 2008 and 2018

Type of service	2008		2018	
	R million	% contribution	R million	% contribution
Education services	1 743	19,3	9 332	42,1
Health and social work	3 081	34,0	6 557	29,7
Sewage and refuse disposal, sanitary and similar activities	261	2,9	1 699	7,7
Activities of membership organisations	317	3,5	509	2,3
Recreational, cultural and sporting activities	3 322	36,7	3 734	16,9
Other service activities	330	3,6	277	1,3
Total	9 054	100,0	22 108	100,0

Source: Report No. 91-01-01

The capital expenditure on new assets in 2018 (R22,1 billion) represents an increase of 9,3% per annum over the expenditure reported in 2008 (R9,1 billion). The largest contributor to capital expenditure on new assets was 'education services' (R9,3 billion or 42,1%), followed by 'health and social work' (R6,6 billion or 29,7%) and 'recreational, cultural and sporting activities' (R3,7 billion or 16,9%).

Between 2008 and 2018, 'recreational, cultural and sporting activities' lost the biggest percentage share (-19,8 percentage points) in capital expenditure on new assets (from a percentage contribution of 36,7% in 2008 to 16,9% in 2018). 'Education services' gained the biggest percentage share (+22,8 percentage points) in capital expenditure on new assets when compared with the results of 2018 (from a percentage contribution of 19,3% in 2008 to 42,1% in 2018).



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Statistician-General

3. Tables

Table 1 – Principal statistics in the personal services industry, 2008 and 2018

	Total income	Total current expenditure	Total value of opening inventory	Total value of closing inventory	Net profit before tax	Capital expenditure on assets	Number of employees
	R million						Number
2008	167 640	144 567	1 976	2 182	23 279	9 054	485 140
2018	380 781	337 268	4 828	5 050	43 735	22 108	497 238
Annualised % change	8,5	8,8	9,3	8,8	6,5	9,3	0,2

Table 2 – Principal statistics by type of service in the personal services industry, 2008 and 2018

Type of service	Total income			Total expenditure			Total value of opening inventory		
	2008	2018	Annualised % change	2008	2018	Annualised % change	2008	2018	Annualised % change
	R million			R million			R million		
Education services	36 459	97 540	10,3	32 070	87 571	10,6	159	1 099	21,3
Health and social work	73 557	164 696	8,4	60 560	140 920	8,8	1 205	2 835	8,9
Sewage and refuse disposal, sanitary and similar activities	3 628	18 087	17,4	3 332	15 921	16,9	24	157	20,7
Activities of membership organisations	5 311	17 948	12,9	4 892	16 563	13,0	35	84	9,1
Recreational, cultural and sporting activities	42 856	75 990	5,9	38 123	70 052	6,3	371	485	2,7
Other service activities	5 829	6 520	1,1	5 590	6 241	1,1	182	168	-0,8
Total	167 640	380 781	8,5	144 567	337 268	8,8	1 976	4 828	9,3

Table 2 – Principal statistics by type of service in the personal services industry, 2008 and 2018 (concluded)

Type of service	Total value of closing inventory			Net profit before tax			Capital expenditure on assets		
	2008	2018	Annualised % change	2008	2018	Annualised % change	2008	2018	Annualised % change
	R million			R million			R million		
Education services	149	1 235	23,6	4 379	10 105	8,7	1 743	9 332	18,3
Health and social work	1 419	2 937	7,5	13 211	23 878	6,1	3 081	6 557	7,8
Sewage and refuse disposal, sanitary and similar activities	43	161	14,1	315	2 170	21,3	261	1 699	20,6
Activities of membership organisations	38	80	7,7	423	1 381	12,6	317	509	4,8
Recreational, cultural and sporting activities	339	456	3,0	4 702	5 909	2,3	3 331	3 734	1,1
Other service activities	194	181	-0,7	249	292	1,6	321	277	-1,5
Total	2 182	5 050	8,8	23 279	43 735	6,5	9 054	22 108	9,3

Table 3 – Principal statistics by type of service in the personal services industry, 2018

Type of service	Total income	Total expenditure	Total value of opening inventory	Total value of closing inventory	Net profit before tax	Capital expenditure on assets
	R million					
Education services	97 540	87 571	1 099	1 235	10 105	9 332
Hospital activities	56 013	50 402	630	739	5 720	1 883
Medical and dental practice activities	46 728	33 667	566	559	13 054	3 033
Other human health activities	39 871	35 555	1 082	1 038	4 272	1 032
Veterinary activities	5 240	4 790	245	290	495	96
Social work activities	16 844	16 506	312	311	337	513
Sewage and refuse disposal, sanitary and similar activities	18 087	15 921	157	161	2 170	1 699
Activities of business and employers' organisations	5 373	5 103	17	23	276	68
Activities of professional organisations	2 779	2 618	7	7	161	22
Activities of other membership organisations	9 796	8 842	60	50	944	419
Motion picture and video production and distribution	11 119	10 555	38	6	532	195
Other entertainment activities	6 675	6 353	127	40	235	454
Library, archives, museums and other cultural activities	5 208	4 802	63	105	448	565
Sporting activities	20 309	19 277	114	149	1 067	1 398
Other recreational activities	32 679	29 065	143	156	3 627	1 122
Washing and (dry-) cleaning of textiles and fur products	929	878	6	9	54	41
Hairdressing and other beauty treatment	1 975	1 932	74	85	54	73
Funeral and related activities	2 758	2 601	48	52	161	114
Other service activities n.e.c.	858	830	40	35	23	49
Total	380 781	337 268	4 828	5 050	43 735	22 108

Table 4 – Profit margin in the personal services industry, 2008 and 2018

Type of service	Net profit after tax		Turnover		Profit margins	
	2008	2018	2008	2018	2008	2018
	R million				%	
Education services						
Health and social work	5 255	7 626	38 777	95 083	13,6	8,0
Sewage and refuse disposal, sanitary and similar activities	251	1 774	3 411	17 324	7,4	10,2
Activities of membership organisations	289	1 325	3 223	13 839	9,0	9,6
Recreational, cultural and sporting activities	3 232	4 390	39 697	64 700	8,1	6,8
Other service activities	267	222	5 821	6 329	4,6	3,5
Total	9 294	15 337	90 929	197 275	10,2	7,8

Table 5 – Income in the personal services industry, 2008 and 2018

Type of income	2008		2018		Annualised % change
	R million	% contribution	R million	% contribution	
Sales of goods	14 043	8,5	12 782	3,4	-0,9
Services	117 162	71,0	289 739	76,1	9,5
Interest	2 811	1,7	7 433	2,0	10,2
Rental, leasing income	972	0,6	3 182	0,8	12,6
Other income	30 091	18,2	67 645	17,8	8,4
Total	165 079	100,0	380 781	100,0	8,7

Table 6 – Income by type of service in the personal services industry, 2018

Type of service	Sales of goods	Services rendered	Interest	Rental, leasing income	Other income	Total income
	R million					
Education services	1 268	53 480	2 375	423	39 994	97 540
Hospital activities	1 270	50 190	1 881	756	1 916	56 013
Medical and dental practice activities	677	44 915	378	139	619	46 728
Other human health activities	1 779	35 844	255	231	1 762	39 871
Veterinary activities	1 369	3 638	28	6	199	5 240
Social work activities	129	6 932	347	437	8 999	16 844
Sewage and refuse disposal, sanitary and similar activities	1 545	15 756	127	23	636	18 087
Activities of business and employers' organisations	95	4 360	160	96	662	5 373
Activities of professional organisations	152	2 130	139	5	353	2 779
Activities of other membership organisations	404	6 587	191	38	2 576	9 796
Motion picture and video production and distribution	124	9 770	71	7	1 147	11 119
Other entertainment activities	176	5 790	133	52	524	6 675
Library, archives, museums and other cultural activities	491	2 730	161	54	1 772	5 208
Sporting activities	2 466	12 418	363	801	4 261	20 309
Other recreational activities	224	29 499	785	98	2 073	32 679
Washing and (dry-) cleaning of textiles and fur products	0	912	8	0	9	929
Hairdressing and other beauty treatment	221	1 707	10	5	32	1 975
Funeral and related activities	334	2 310	17	9	88	2 758
Other service activities n.e.c.	58	771	4	2	23	858
Total	12 782	289 739	7 433	3 182	67 645	380 781

Table 7 – Income by size group in the personal services industry, 2018

Type of service	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	R million				
Education services	65 803	24 350	3 071	4 316	97 540
Hospital activities	52 260	1 235	2 159	359	56 013
Medical and dental practice activities	7 692	2 673	13 356	23 007	46 728
Other human health activities	23 115	1 387	6 353	9 016	39 871
Veterinary activities	467	503	3 195	1 075	5 240
Social work activities	6 273	2 334	5 209	3 028	16 844
Sewage and refuse disposal, sanitary and similar activities	15 634	994	1 114	345	18 087
Activities of business and employers' organisations	2 755	1 191	1 113	314	5 373
Activities of professional organisations	1 729	433	617	0	2 779
Activities of other membership organisations	6 074	623	2 404	695	9 796
Motion picture and video production and distribution	7 361	1 458	1 753	547	11 119
Other entertainment activities	4 305	761	1 397	212	6 675
Library, archives, museums and other cultural activities	3 868	922	371	47	5 208
Sporting activities	11 323	1 839	4 654	2 493	20 309
Other recreational activities	26 112	2 313	2 954	1 300	32 679
Washing and (dry-) cleaning of textiles and fur products	0	64	475	390	929
Hairdressing and other beauty treatment	289	315	584	787	1 975
Funeral and related activities	974	301	965	518	2 758
Other service activities n.e.c.	0	18	291	549	858
Total	236 034	43 714	52 035	48 998	380 781

Table 8 – Concentration ratios (relative contribution of large enterprises) in the personal services industry, 2018

Type of service	Total income	Income of 5 largest enterprises	Relative contribution of 5 largest enterprises ²	Income of 10 largest enterprises	Relative contribution of 10 largest enterprises ²	Income of 20 largest enterprises	Relative contribution of 20 largest enterprises ²
	R million		%	R million	%	R million	%
Education services	97 540	32 915	33,7	53 772	55,1	70 678	72,5
Hospital activities	56 013	39 504	70,5	41 818	74,7	45 280	80,8
Medical and dental practice activities	46 728	2 655	5,7	4 060	8,7	5 556	11,9
Other human health activities	39 871	15 030	37,7	18 946	47,5	21 577	54,1
Veterinary activities	5 240	626	11,9	880	16,8	1 198	22,9
Social work activities	16 844	2 313	13,7	3 487	20,7	5 003	29,7
Sewage and refuse disposal, sanitary and similar activities	18 087	11 751	65,0	13 176	72,8	14 763	81,6
Activities of business and employers' organisations	5 373	2 223	41,4	2 648	49,3	3 287	61,2
Activities of professional organisations	2 779	1 154	41,5	1 704	61,3	2 231	80,3
Activities of other membership organisations	9 796	1 438	14,7	1 767	18,0	2 051	20,9
Motion picture and video production and distribution	11 119	5 907	53,1	6 627	59,6	7 385	66,4
Other entertainment activities	6 675	2 332	34,9	2 869	43,0	3 441	51,6
Library, archives, museums and other cultural activities	5 208	4 065	78,1	4 529	87,0	4 998	96,0
Sporting activities	20 309	8 299	40,9	9 500	46,8	10 983	54,1
Other recreational activities	32 679	13 066	40,0	16 433	50,3	20 069	61,4
Washing and (dry-) cleaning of textiles and fur products	929	174	18,7	265	28,5	374	40,3
Hairdressing and other beauty treatment	1 975	430	21,8	636	32,2	851	43,1
Funeral and related activities	2 758	1 196	43,4	1 413	51,2	1 649	59,8
Other service activities n.e.c.	858	123	14,3	176	20,5	239	27,9
Total	380 781	53 991 ¹	14,2	84 424 ¹	22,2	124 781 ¹	32,8

¹ These figures reflect the income of the 5, 10 and 20 largest enterprises respectively, and not the column totals.

² Relative contribution = income of the largest enterprises divided by total income multiplied by 100.

Table 9 – Expenditure in the personal services industry, 2008 and 2018

Type of expenditure	2008		2018		Annualised % change
	R million	% contribution	R million	% contribution	
Purchases	30 961	21,4	56 574	16,8	6,2
Employment cost	48 053	33,2	124 915	37,0	10,0
Interest paid	3 322	2,3	7 053	2,1	7,8
Rental and leasing of land, buildings and other structures under operating leases	4 194	2,9	10 522	3,1	9,6
Leasing and hiring of plant, machinery, equipment and vehicles under operating leases	2 382	1,6	6 437	1,9	10,5
Utilities (water and electricity)	1 402	1,0	5 885	1,7	15,4
Other expenditure	54 253	37,5	125 882	37,3	8,8
Total	144 567	100,0	337 268	100,0	8,8

Table 10 – Expenditure in the personal services industry, 2018

Type of service	Purchases	Employment cost	Interest paid	Rental and leasing of land, buildings and other structures under operating leases	Leasing and hiring of plant, machinery, equipment and vehicles under operating leases	Utilities (water and electricity)	Other expenditure	Total
	R million							
Education services	6 672	44 232	629	1 398	722	1 596	32 322	87 571
Hospital activities	10 273	19 818	3 112	2 615	2 505	1 163	10 916	50 402
Medical and dental practice activities	5 056	14 315	375	1 991	656	334	10 940	33 667
Other human health activities	7 102	12 455	326	1 271	499	205	13 697	35 555
Veterinary activities	2 259	1 334	31	136	32	57	941	4 790
Social work activities	1 624	7 411	46	188	37	568	6 632	16 506
Sewage and refuse disposal, sanitary and similar activities	4 909	3 838	629	122	729	97	5 597	15 921
Activities of business and employers' organisations	200	1 257	10	51	17	146	3 422	5 103
Activities of professional organisations	172	992	11	136	8	11	1 288	2 618
Activities of other membership organisations	637	2 705	11	231	26	147	5 085	8 842
Motion picture and video production and distribution	3 098	1 619	142	110	351	17	5 218	10 555
Other entertainment activities	1 830	1 649	457	219	70	105	2 023	6 353
Library, archives, museums and other cultural activities	615	1 945	20	30	74	99	2 019	4 802
Sporting activities	3 817	4 928	719	1 164	329	829	7 491	19 277
Other recreational activities	6 670	4 517	456	370	330	358	16 364	29 065
Washing and (dry-) cleaning of textiles and fur products	202	356	10	59	8	56	187	878
Hairdressing and other beauty treatment	519	760	18	188	10	23	414	1 932
Funeral and related activities	693	515	31	164	25	65	1 108	2 601
Other service activities n.e.c.	226	269	20	79	9	9	218	830
Total	56 574	124 915	7 053	10 522	6 437	5 885	125 882	337 268

Table 11 – Capital expenditure on new assets in the personal services industry, 2008 and 2018

Type of asset	2008		2018		Annualised % change
	R million	% contribution	R million	% contribution	
Land and buildings	2 799	30,9	8 596	38,9	11,9
Plant, machinery, furniture and other office equipment	3 727	41,2	6 760	30,6	6,1
Computers and other ICT equipment	466	5,1	1 851	8,4	14,8
Motor vehicles and other transport equipment	1 088	12,0	1 860	8,4	5,5
Other assets	974	10,8	3 041	13,8	12,1
Total	9 054	100,0	22 108	100,0	9,3

Table 12 – Capital expenditure on new assets in the personal services industry, 2018

Type of service	Land and buildings	Plant, machinery, furniture and other office equipment	Computers and other ICT equipment	Motor vehicles and other transport equipment	Other assets	Total
	R million					
Education services	5 234	1 446	914	236	1 502	9 332
Hospital activities	272	1 096	84	42	389	1 883
Medical and dental practice activities	359	2 095	210	353	16	3 033
Other human health activities	351	304	67	197	113	1 032
Veterinary activities	12	48	4	27	5	96
Social work activities	285	139	32	35	22	513
Sewage and refuse disposal, sanitary and similar activities	297	291	45	292	774	1 699
Activities of business and employers' organisations	22	29	11	4	2	68
Activities of professional organisations	0	3	8	1	10	22
Activities of other membership organisations	151	66	30	138	34	419
Motion picture and video production and distribution	6	14	103	19	53	195
Other entertainment activities	122	135	143	44	10	454
Library, archives, museums and other cultural activities	223	39	5	288	10	565
Sporting activities	724	520	86	26	42	1 398
Other recreational activities	491	450	103	26	52	1 122
Washing and (dry-) cleaning of textiles and fur products	2	26	1	12	0	41
Hairdressing and other beauty treatment	27	34	3	2	6	72
Funeral and related activities	6	23	2	83	0	114
Other service activities n.e.c.	12	2	0	35	1	50
Total	8 596	6 760	1 851	1 860	3 041	22 108

Table 13 – Employment in the personal services industry, as at the end of June 2008 and 2018

Type of service	Female employees			Male employees			Total employees		
	2008	2018	Annualised % change	2008	2018	Annualised % change	2008	2018	Annualised % change
	Number			Number			Number		
Education services	52 173	70 072	3,0	43 853	56 412	2,6	96 027	126 484	2,8
Health and social work	177 532	170 811	-0,4	52 268	64 336	2,1	229 798	235 147	0,2
Sewage and refuse disposal, sanitary and similar activities	2 312	5 703	9,4	6 423	14 082	8,2	8 735	19 785	8,5
Activities of membership organisations	9 797	10 412	0,6	5 798	7 272	2,3	15 594	17 684	1,3
Recreational, cultural and sporting activities	38 078	36 888	-0,3	53 152	40 316	-2,7	91 226	77 204	-1,7
Other service activities	32 177	13 627	-8,2	11 584	7 307	-4,5	43 760	20 934	-7,1
Total	312 069	307 513	-0,1	173 078	189 725	0,9	485 140	497 238	0,2

Table 14 – Employment by status in the personal services industry, as at the end of June 2018

Type of service	Full-time			Part-time			Total
	Female	Male	Total	Female	Male	Total	
	Number						
Education services	54 250	42 607	96 857	15 822	13 805	29 627	126 484
Hospital activities	45 355	18 358	63 713	560	287	847	64 560
Medical and dental practice activities	36 210	9 957	46 167	3 501	1 034	4 535	50 702
Other human health activities	36 090	20 549	56 639	2 855	543	3 398	60 037
Veterinary activities	3 994	2 471	6 465	394	120	514	6 979
Social work activities	39 661	10 651	50 312	2 191	366	2 557	52 869
Sewage and refuse disposal, sanitary and similar activities	5 227	11 941	17 168	476	2 141	2 617	19 785
Activities of business and employers' organisations	1 342	2 073	3 415	80	57	137	3 552
Activities of professional organisations	1 513	1 007	2 520	41	28	69	2 589
Activities of other membership organisations	6 922	3 651	10 573	514	456	970	11 543
Motion picture and video production and distribution	1 652	1 530	3 182	947	1 378	2 325	5 507
Other entertainment activities	3 472	3 484	6 956	254	506	760	7 716
Library, archives, museums and other cultural activities	2 944	2 825	5 769	117	130	247	6 016
Sporting activities	8 600	14 431	23 031	1 784	2 226	4 010	27 041
Other recreational activities	16 035	13 205	29 240	1 083	601	1 684	30 924
Washing and (dry-) cleaning of textiles and fur products	2 855	1 900	4 755	311	74	385	5 140
Hairdressing and other beauty treatment	5 298	1 190	6 488	139	10	149	6 637
Funeral and related activities	2 443	2 973	5 416	345	443	788	6 204
Other service activities n.e.c.	1 664	680	2 344	572	37	609	2 953
Total	275 527	165 483	441 010	31 986	24 242	56 228	497 238

Table 15 – Employment by enterprise size in the personal services industry, as at the end of June 2018

Type of service	Large enterprises	Medium enterprises	Small enterprises	Micro enterprises	Total
	R million				
Education services	85 833	25 302	4 532	10 817	126 484
Hospital activities	58 927	1 890	3 421	322	64 560
Medical and dental practice activities	6 264	1 822	14 141	28 475	50 702
Other human health activities	31 260	2 230	9 913	16 634	60 037
Veterinary activities	130	471	4 155	2 223	6 979
Social work activities	11 785	5 545	18 285	17 254	52 869
Sewage and refuse disposal, sanitary and similar activities	14 105	2 020	2 240	1 420	19 785
Activities of business and employers' organisations	1 194	939	1 166	253	3 552
Activities of professional organisations	1 685	300	604	0	2 589
Activities of other membership organisations	2 965	1 232	3 825	3 521	11 543
Motion picture and video production and distribution	1 713	766	1 792	1 236	5 507
Other entertainment activities	4 600	638	2 228	250	7 716
Library, archives, museums and other cultural activities	3 364	2 041	589	22	6 016
Sporting activities	10 705	3 300	9 129	3 907	27 041
Other recreational activities	20 351	2 513	4 767	3 293	30 924
Washing and (dry-) cleaning of textiles and fur products	0	25	3 178	1 937	5 140
Hairdressing and other beauty treatment	547	751	2 434	2 905	6 637
Funeral and related activities	1 437	786	2 398	1 583	6 204
Other service activities n.e.c.	0	20	668	2 265	2 953
Total	256 865	52 591	89 465	98 317	497 238

Table 16 – Details of income from services rendered for educational activities, 2018

Type of service	Tuition		Accommodation	
	R million	% contribution	R million	% contribution
Pre-Grade R phase (nursery schools, kindergartens, pre-schools)	475	1,0	0	0,0
Grade-R	502	1,0	0	0,0
Foundation phase (Grade 1-Grade 3)	576	1,2	0	0,0
Intermediate phase (Grade 4-Grade 6)	669	1,4	28	0,3
Senior phase (Grade 7-Grade 9)	1 804	3,7	206	2,0
Further education and training phase (FET) (Grade 10-Grade 12)	1 301	2,7	164	1,6
Total basic education services	5 327	11,0	398	3,9
Bachelors or equivalent (including advanced diplomas, PG diplomas, degrees and honours)	25 541	52,9	9 349	91,1
Other tertiary education services	2 001	4,1	154	1,5
Total tertiary education services	27 542	57,0	9 503	92,6
Other services rendered	15 472	32,0	358	3,5
Total income from services rendered	48 341	100,0	10 259	100,0

Table 17 – Details of income from services rendered for health activities, 2018

Type of service	R million	% contribution
Accommodation, ward fees	14 822	14,5
Clinic services in and out	2 631	2,6
Theatre services or fees	4 048	3,9
Medical/health/nursing training services	9 566	9,3
Other hospital services	3 381	3,3
Total hospital activities	34 448	33,6
Blood, sperm and organ bank services	3 958	3,9
Dental practice and orthodontist activities	3 221	3,1
General practitioner	4 361	4,3
Nephrology including dialysis services	2 236	2,2
Medical scan services (radiology, magnetic resonance imaging - MRI and computed tomography - CT)	5 560	5,4
Services provided by medical laboratories (including pathologists)	11 057	10,8
Other general and specialised medical services	19 555	19,1
Other human health activities	14 870	14,5
Total general and specialised medical services	64 818	63,3
Total veterinary activities	2 071	2,0
Other services rendered	1 167	1,1
Total income from services rendered	102 504	100,0

Table 18 – Details of income from services rendered for social work activities, 2018

Type of service	R million	% contribution
Residential care services for the elderly	5 473	57,3
Residential care services for children suffering from mental and physical disability, mental health illnesses or substance abuse	278	2,9
Residential care services for adults suffering from mental and physical disability, mental health illnesses or substance abuse	314	3,3
Sub-total residential care and boarding (accommodation services)	6 065	63,5
Adoption services	588	6,1
Child day care services	813	8,5
Other social work activities	1 572	16,4
Other services rendered	533	5,5
Total income from services rendered	9 571	100,0

Table 19 – Details of income from services rendered for sewerage activities, 2018

Type of service	R million	% contribution
Sewerage and sewage treatment services	1 268	8,8
Collection services of hazardous waste	1 166	8,1
General waste collection services	5 778	39,9
Waste preparation, consolidation and storage services	2 419	16,8
Hazardous waste treatment services (including: biological and chemical)	1 069	7,4
Other waste treatment and disposal services	457	3,2
Other services rendered	2 279	15,8
Total income from services rendered	14 436	100,0

Table 20 – Details of income from services rendered for membership activities, 2018

Type of service	R million	% contribution
Membership fees/subscriptions (registration)	8 784	75,6
Other membership related services	572	5,0
Other services rendered	2 255	19,4
Total income from services rendered	11 621	100,0

Table 21 – Details of income from services rendered for entertainment activities, 2018

Type of service	R million	% contribution
Motion picture, videotape and television programme production services	6 509	43,9
Motion picture, videotape and television programme distribution services	1 025	6,9
Audio-visual editing services	623	4,2
News clipping services	615	4,2
Promotion and advertising services	2 952	20,0
Other entertainment services	2 725	18,5
Other services rendered	327	2,3
Total income from services rendered	14 776	100,0

Table 22 – Details of income from services rendered for library activities, 2018

Type of service	R million	% contribution
Admission/service fees	1 108	47,0
Conferences/conventions/seminars/workshops and team-building activities	149	6,3
Accommodation	854	36,3
Other services rendered	244	10,4
Total income from services rendered	2 355	100,0

Table 23 – Details of income from services rendered for sports activities, 2018

Type of service	R million	% contribution
Sports and recreational sports event promotion services	1 988	5,1
Services of sports clubs	1 153	3,0
Sports and recreational sports facility operation services	792	2,0
Other sports and recreational sports services	203	0,5
On-line gambling services	5 218	13,4
Selling services of lotteries, lotto, off-track betting	6 606	17,1
Casino and gambling house services	4 822	12,4
Gambling slot-machine services	2 515	6,5
Bookmaker services	6 249	16,1
Other gambling and betting services	1 176	3,0
Sub-total gambling and betting services	26 586	68,5
Amusement park and similar attraction services	1 418,0	3,7
Fitness centre services	4 595	11,8
Catering/restaurant services	507	1,3
Other recreation and amusement services	1 059	2,7
Other services rendered	531	1,4
Total income from services rendered	38 832	100,0

Table 24 – Information and communication technology usage by type of service in the personal services industry, 2018

Type of service	Use computer	Use internet	Use internet banking	Have website	Receive orders over the internet	Place orders over the internet	IT outsourced
	% of enterprises						
Education services	99,0	100,0	79,3	96,8	35,3	32,1	39,8
Hospital activities	100,0	100,0	68,2	92,1	25,4	23,1	45,0
Medical and dental practice activities	99,7	98,7	79,9	65,2	25,6	26,3	53,0
Other human health activities	100,0	99,1	64,9	79,9	25,2	29,7	64,6
Veterinary activities	100,0	99,3	77,7	71,0	26,3	35,6	50,7
Social work activities	100,0	99,2	64,7	85,0	20,5	24,9	53,0
Sewage and refuse disposal, sanitary and similar activities	100,0	100,0	69,1	75,8	23,6	23,8	47,5
Activities of business and employers' organisations	100,0	100,0	71,4	91,9	31,5	25,2	66,6
Activities of professional organisations	100,0	100,0	61,7	100,0	36,2	30,9	69,1
Activities of other membership organisations	100,0	97,8	60,6	96,9	30,4	33,7	56,8
Motion picture and video production and distribution	100,0	97,8	74,2	91,0	35,8	33,7	54,9
Other entertainment activities	100,0	100,0	60,6	98,9	22,7	22,7	68,9
Library, archives, museums and other cultural activities	100,0	100,0	67,4	97,2	32,6	17,4	66,3
Sporting activities	100,0	100,0	68,9	93,2	31,0	21,1	65,7
Other recreational activities	99,0	98,0	62,0	90,0	24,9	24,9	39,0
Washing and (dry-) cleaning of textiles and fur products	94,5	94,6	78,4	64,2	21,1	24,9	49,6
Hairdressing and other beauty treatment	100,0	94,2	67,3	77,4	31,2	30,0	50,1
Funeral and related activities	97,9	95,7	63,8	80,4	10,7	19,1	40,1
Other service activities n.e.c.	100,0	100,0	69,9	81,1	35,2	37,7	51,6
Total	99,6	98,7	70,7	81,6	26,7	27,3	53,0

Table 25 – Information and communication technology usage by size group in the personal services industry, 2018

Enterprise size	Use computer	Use internet	Use internet banking	Have website	Receive orders over the internet	Place orders over the internet	IT outsourced
	% of enterprises						
Large	99,7	99,2	66,3	95,2	28,3	27,0	44,4
Medium	99,7	99,4	68,3	91,9	28,0	28,3	62,7
Small	99,7	99,1	71,5	79,5	27,9	28,8	59,1
Micro	99,3	97,2	74,7	66,4	22,8	24,9	44,5
Total	99,6	98,7	70,7	81,6	26,7	27,3	53,0

Explanatory notes

Background	<p>The results presented in this publication have been derived from the 2018 personal services large sample survey. This is a periodic survey which measures economic activity in the personal services industry of the South African economy. This survey is based on a sample of private and public enterprises operating in the personal services industry.</p> <p>The sample was drawn from Stats SA's business register, based on the units registered for value added tax (VAT).</p>
Value added tax (VAT)	All figures exclude value added tax (VAT).
Reference period	The information was collected from enterprises for their financial year which ended on any date between 01 July 2017 and 30 June 2018.
Purpose of the survey	Results of the survey are used within Stats SA for benchmarking the gross domestic product (GDP) and its components. These statistics are also used by government policy advisors in monitoring the performance and contribution of individual industries to the South African economy and the effectiveness of industry policies, and by private sector users in analyses of comparative business and industry performance.
Classification by industry	The 1993 edition of the <i>Standard Industrial Classification of All Economic Activities</i> (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 <i>International Standard Industrial Classification of All Economic Activities</i> (ISIC) with suitable adaptations for local conditions. Statistics in this publication are presented at SIC group (five-digit) level. Each enterprise is classified to an industry, which reflects its predominant activity.
Statistical unit	The statistical unit for the collection of the information is an enterprise. An enterprise is a legal unit (or a combination of legal units) that includes and directly controls all functions necessary to carry out its production activities.
Size groups	The enterprises are divided into four size groups according to the value of turnover recorded for them on the Stats SA business register. Large enterprises are those with an annual recorded turnover above R192 million. Table 26 presents Department of Trade, Industry and Competition (DTIC) cut-off points adjusted by a factor of 6,0.

Table 26 – Size groups for the personal services industry

Size group	Annual turnover
Large enterprises	Turnover > R192 000 000
Medium enterprises	R96 000 000 < turnover ≤ R192 000 000
Small enterprises	R18 000 000 < turnover ≤ R96 000 000
Micro enterprises	Turnover ≤ R18 000 000

Survey methodology and design	<p>The survey was conducted by post, email, fax, telephone and personal visits.</p> <p>A sample of approximately 3 000 enterprises was drawn using stratified simple random sampling. The enterprises were first stratified at the four-digit level according to the SIC and then by size of enterprise. All large and medium enterprises were completely enumerated. Turnover as recorded on the business register was used as the measure of size for stratification. The collection rate was 77,2%.</p>
Collection rate	<p>Collection rate = ((collected + finalised investigations)/ sample size) x 100</p>
Turnover collection rate	<p>Turnover collection rate = ((weighted collected enterprises BR turnover + weighted finalised investigations BR turnover)/population turnover) x 100. The turnover collection rate was 88,4%.</p>
Weighting methodology	<p>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 were calculated and then aggregated with the completely enumerated stratum to form division estimates.</p>
Relative standard error	<p>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 food and beverages industry in South Africa.</p> <p>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 error likely to have occurred as a result of sampling, and thus avoids the need to refer to the size of the estimate.</p>

Table 27 – Income in the personal services industry within 95% confidence limits, 2018

Type of service	Lower limit	Total income	Upper limit	Relative standard error (%)
	R million			
Education services	93 143	97 540	101 937	2,3
Health and social work	159 208	164 696	170 184	1,7
Sewage and refuse disposal, sanitary and similar activities	17 343	18 087	18 831	2,1
Activities of membership organisations	16 822	17 948	19 074	3,2
Recreational, cultural and sporting activities	71 523	75 991	80 459	3,0
Other service activities	5 996	6 520	7 044	4,1
Total	372 572	380 781	388 992	1,1

Abbreviations

BR	Business Register
DTIC	Department of Trade, Industry and Competition
GDP	Gross domestic product
ISIC	International Standard Industrial Classification of All Economic Activities
IT	Income tax
n.e.c.	Not elsewhere classified
RSE	Relative standard error
SARS	South African Revenue Service
SE	Standard error
SIC	Standard Industrial Classification of all Economic Activities
SNA	System of National Accounts
Stats SA	Statistics South Africa
VAT	Value added tax

Glossary

Concentration ratio	The ratio of the income of the <i>n</i> largest enterprises to the total income.
Employees	Persons employed by a business or organisation and who received payment (in salaries, wages, commission, piece rates or payments in kind) for the last pay period ended on or before 30 June 2018.
Enterprise	A legal entity or a combination of legal units that includes and directly controls all functions necessary to carry out its activities.
Full-time employees	Full-time employees are those (permanent, temporary or casual) who normally work 40 hours or more per week.
Labour brokers	Agents who recruit and administer workers on behalf of the enterprise. They do not provide any other service.
Motor vehicles	Motor vehicles include cars, trucks, aircraft, boats, trailers, locomotives and other transport equipment.
Net profit or loss after tax	Net profit or loss after tax is derived as: Total income plus closing value of inventories minus total expenditure minus opening value of inventories minus company tax
Net profit or loss before tax	Net profit or loss before tax is derived as: Total income plus closing value of inventories minus total expenditure minus opening value of inventories

Other expenditure	<p>Includes:</p> <p>Accommodation; advertising; amortisation, <i>excluding depreciation</i>; bank charges; bursaries for own employees (staff bursaries); containers and packaging materials; computer expenditure (when not part of non-current assets); donations, sponsorships and social investment for <i>non-employees</i>; entertainment; excise and customs duty; losses on foreign exchange as a result of variations in foreign exchange rates; losses on financial and other liabilities: redemption, liquidation or revaluation; mineral rights leases; paper, printing and stationery; postal and courier services; property taxes paid; provisions; railage and transport-out; research and development; royalties, franchise fees, copyright, trade names, trademarks and patent rights paid; security services; severance, termination and redundancy payments; skills development levy; staff training; subscriptions; travelling; water and electricity; payments to labour brokers; and other expenditure.</p>
Other income	<p>Includes:</p> <p>Capital transfers received (only from the South African government); customs duty received; dividends received; excise duty received; mineral rights leases; net profit on foreign loans as a result of variations in foreign exchange rates; royalties, franchise fees, copyright, trade names and patent rights received; profit on financial and other liabilities: redemption, liquidation and revaluation of liabilities; provisions; government subsidies and incentives received (only from the South African government); and other income.</p>
Part-time employees	<p>Part-time employees are those (permanent, temporary or casual) who usually work less than 40 hours per week.</p>
Profit margin	<p>Profit margin is derived as:</p> <p>Net profit or loss after tax <i>divided by</i> turnover <i>multiplied by</i> 100</p>
Statistical unit	<p>A statistical unit is a unit of observation or measurement for which statistical data are collected or derived.</p>
Stratum	<p>A stratum is constructed by concatenating the SIC classification and size group variables.</p>
Turnover	<p>Turnover includes:</p> <ul style="list-style-type: none">• value of sales of goods;• amount received for services rendered;• rent and lease payments received for land and buildings; and• rent, leasing and hiring received for machinery, vehicles and other equipment.
Zero values	<p>All rand values less than R500 000.</p>