

Mbalo Brief



the missing piece of the puzzle

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**Statistics
South Africa**



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Editor's comment

"While many people look forward to a fulfilling old age, more than one in five adults aged 60 and over experience mental or neurological disorders, such as dementia and depression." These were the words of United Nations Secretary-General Ban Ki-moon on the occasion of the World Mental Health Day, 10 October 2013. Mental health conditions are often frowned upon and people suffering from mental illnesses are at times not treated with dignity. And while this year's theme for World Mental Health Day focused on the aged and mental health, mental illnesses do not affect old people exclusively – people of any age can suffer from mental illnesses.

In this issue of *Mbalo Brief*, we conclude the Census 2011 provincial results highlights with an educational article dedicated to Northern Cape census results. We look at the province's population growth in 2011 in comparison to 2001, the unemployment rate, access to housing, basic services, and possession of certain household goods among others.

Solutions for September's puzzle and a new general knowledge crossword puzzle are included on page iv. You can also expect to be informed on the performance of various industries in our economy, including mining, motor trade, manufacturing, and retail trade sales, among others. To help you measure the cost of living, articles on both the producer and consumer price indices are included.

Articles published in this issue are based on results of industry surveys conducted for the months ranging from July to September 2013 which were released in September and October 2013. For full details on any of the surveys, visit our website at www.statssa.gov.za

Remember that mental health conditions can affect any human-being, regardless of age, creed or colour. Be empathetic to all people suffering from mental illnesses in your family and your community, and treat them with respect and dignity.



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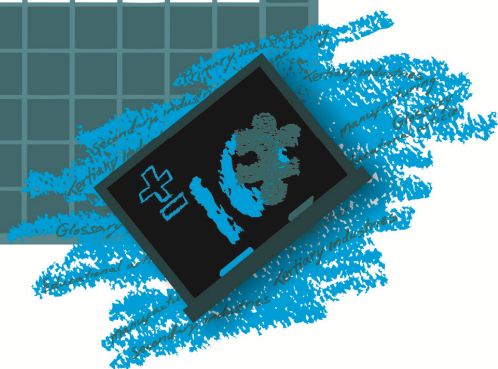
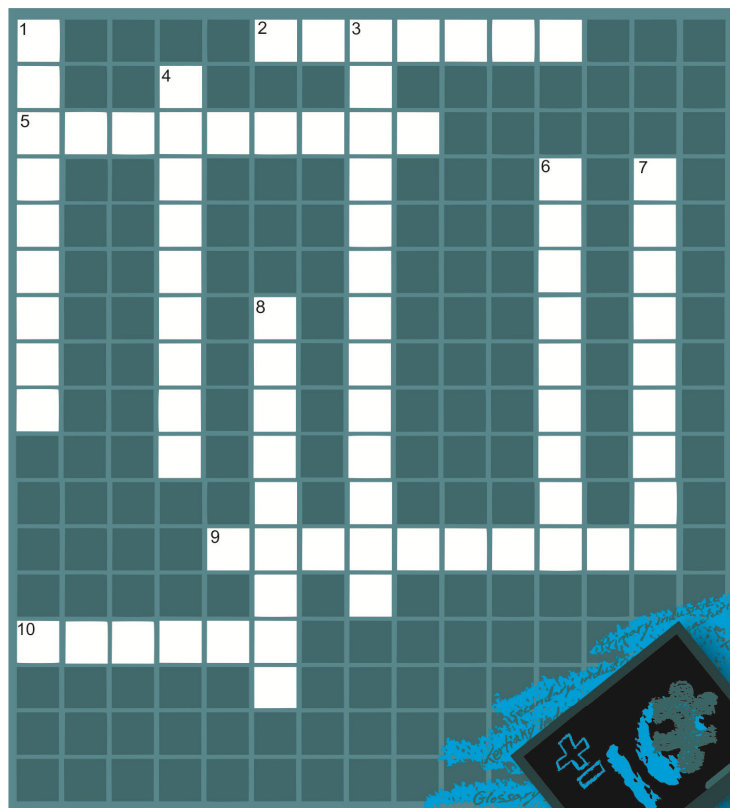


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Crossword puzzle





Across

2. Aside from Botswana, which other country shares a border with Northern Cape?
5. Which language is the most frequently spoken by Northern Cape's households?
9. Which official language is the least spoken in South Africa?
10. Which country is the host of the 2014 Soccer World Cup?

Down

1. In South Africa, October is known as the month. Fill in the missing word.
3. Which industry is involved in the production of goods for use or sale?
4. What is the capital of Northern Cape?
6. Which household good is owned by most households in Northern Cape?
7. In mining production, which mineral recorded the highest positive growth rate in July 2013? ore fill in the missing word.
8. In April 2013, Stats SA introduced a new sample for one of the trade surveys. Which survey is this?

Solutions for September 2013 puzzle

Across

4. CPI
5. Western Cape
7. Lesotho
10. King Shaka
11. Retail
12. Sesotho

Down

1. Heritage
2. Union
3. Manufacturing
4. Cellphone
6. Emigration
8. Holidays
9. Zuma





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Census educational article: Northern Cape

1. Introduction

Northern Cape is South Africa's largest province, and is slightly bigger than Germany, taking up nearly a third of South Africa's land area. This will be discussed in detail later on. The province was established in 1994 when the Cape Province was split up into Western Cape, Eastern Cape, and Northern Cape. Northern Cape has a shoreline in the west on the South Atlantic Ocean and borders Namibia and Botswana. Kimberley is the capital city of Northern Cape, and some of the important towns are Upington (where sheep and dried fruit industries are found) and De Aar, which is the hub of South Africa's railway network.

In this article, we present some of the Census 2011 results relating to Northern Cape. The results that will be covered are those relating to land area, population size, education, unemployment, and household goods and services.

2. Geography and demography

2.1 Land area and population

Northern Cape is South Africa's largest province with a land area of 372 889 square kilometres. This is an increase from the 362 599 square kilometres recorded in 2001. The increase is a result of provincial boundary changes where cross-boundary municipalities between Northern Cape and North West were absorbed in full into their respective provinces. One such municipality is the Ga-Segonyana Local Municipality which was allocated to Northern Cape in full by 2011.

Although Northern Cape is the largest province, it is the least populated province in South Africa with 1,1 million people making up 2,2% of South Africa's population. In the 1996 and 2001 censuses, Northern Cape had a population size of 1,0 million and 991 000 respectively.





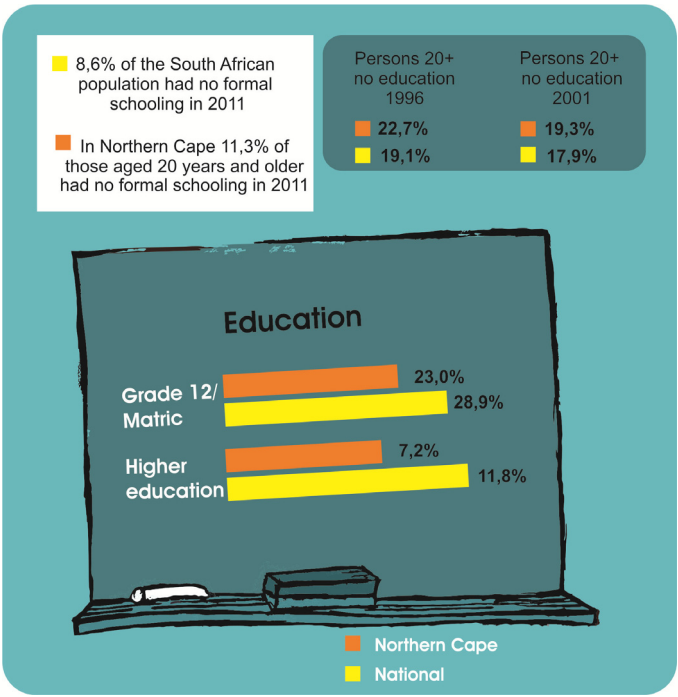
Black Africans make up most of the population in Northern Cape, at 50,4% in 2011, followed by coloureds (40,3%), whites (7,1%), other races (1,6%) and lastly, the Indian/Asian population who makes up 0,7% of the population. In 2011, there were 580 889 females and 564 972 males.

2.2 Languages

The languages most spoken in many households in Northern Cape are Afrikaans (53,8%), followed by Setswana (33,1%), IsiXhosa (5,3%), English (3,4) and Sesotho (1,3%).

3. Education

Figure 1: Literacy level in Northern Cape compared to the national average



In 2011, 128 332 people aged 5–24 years were not attending any educational institution. A total of 289 812 people were attending an educational institution. Below is the breakdown of the number of people attending any of the different educational institutions:

- Pre-school – 2 437
- School – 279 929
- College – 4 150
- University/Technikon – 1 710
- ABET – 322
- Home-based education – 1 342

In 1996, the proportion of people 20 years and older with no formal schooling was 22,7%. This decreased to 19,3% in 2001 and further decreased to 11,3% in 2011. The percentage of those with matric or Grade 12 was 11,1% in 1996. This figure increased in 2001 and 2011 to 15,8% and 23,0% respectively. In terms of the highest level of education completed by those 20 years and older, only 7,2% completed some form of higher education in 2011. However, there was a decrease from 6,2% in 1996 to 5,9% in 2001.

4. Unemployment rate

Between 1996 and 2001, there was an increase in the unemployment rate across Northern Cape, with an average of 32,4% to 35,7% respectively. However, in 2011, the unemployment rate dropped to 27,4%.

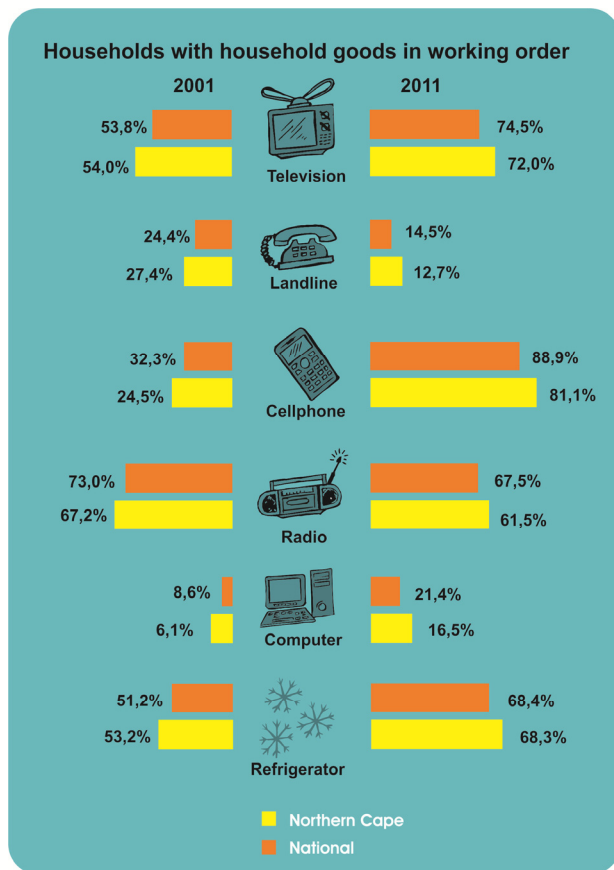
5. Household income

In 2011, the average household income (annual income) in Northern Cape was R86 138. This was an increase from the R39 757 that was recorded in 2001.



6. Household goods

Figure 2: Access to certain household goods by Northern Cape households, in comparison to national averages



Radios – Census 2011 results show a decline in the proportion of households owning radios (from 67,2% in 2001 to 61,5% in 2011).

Landline/telephones – There was a decline in the number of households with access to a landline/telephone (from 27,4% in 2001 to 12,7% in 2011).

Televisions – there was an increase in the number of households owning televisions (from 54,0% in 2001 to 72,0% in 2011).

Computers – the number of households with computers increased from 6,1% in 2001 to 16,5% in 2011.

Refrigerators – in 2011, more households (68,3%) in Northern Cape owned refrigerators compared with 53,2% in 2001.

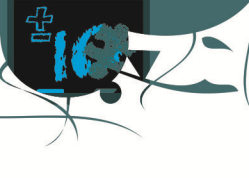
Cellphones – the number of households with cellphones increased from 24,5% in 2001 to 81,1% in 2011.

Internet – the proportion of households with access to the Internet was 25,9% in 2011. Please note that data on access to the Internet were not collected in 2001.

7. Household services

7.1 Electricity

Since 1996, the proportion of households using electricity as the main source of energy for lighting, heating and cooking increased across the Northern Cape province. In 2011, 85,4% of households in Northern Cape used electricity for lighting. This was an increase from the 64,6% in 1996 and 72,4% in 2001. More households were using electricity for cooking in 2011 (78,1%). This was an increase from 46,9% in 1996 and 54,1% in 2001. The number of households who used electricity for heating was 62,2% in 2011, which constitutes an increase from 44,9% in 1996 and 49,4% in 2001.



7.2 Piped water

In 2011, there was an increase in the proportion of households with access to piped water in their dwelling or yard (from 72,0% in 2001 to 78,0% in 2011). There was a decline in the proportion of households having access to piped water on a communal stand (from 22,0% in 2001 to 19,3% in 2011) as well as in the number of households with no access to piped water (from 6,0% in 2001 to 2,6% in 2011).

6.3 Refuse removal

The proportion of households whose refuse was removed by the local authority or a private company was 66,3%% in 2011, which is an increase from 62,6% in 2001. The percentage of those with communal refuse dumps was 26,3% in 2011, which is a decrease from 32,6% in 2001, while those who had to remove their refuse themselves was 5,4% in 2011 compared with 4,8% in 2001.

7.3 Toilet facilities

In 2011, 66,5% of households in Northern Cape had flush or chemical toilets (an increase from 58,6% in 2001). On the other hand, the number of households with no toilet facilities was 8,0% in 2011, which is a decrease from 13,1% in 2001.

8. Conclusion

Being the least populated province, it comes as no surprise that most of the Census 2011 data obtained from the Northern Cape are among the lowest in the country. Northern Cape is also the only province where the population size was less than a million during Census 2001. Another interesting fact about Northern Cape is that it is the only province where more than half of the population speaks Afrikaans.





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Primary industries

Mining: Production and sales

Mining production increases while mineral sales decrease

Mineral Resources Minister, Ms Susan Shabangu, says that there has been an increase in illegal mining activities in Gauteng. One of the main criteria used to define illegal mining is the absence of land rights, a mining licence, exploration or mineral transportation permit or of any document that could show legitimacy of the on-going operations. The country has lost over R4 million to illegal mining; this type of mining is not only harmful to the economy, but also unsafe for communities and the miners themselves, and destructive to the mines. This article presents a summary of the performance of the mining industry for the month of July 2013.

Mining production increased by 0,6% year-on-year in July 2013 (see **Table A**). The highest positive growth rates were recorded for:

- manganese ore (17,0%);
- nickel (14,7%); and
- chromium ore (12,3%).

The main contributors to the 0,6% increase were PGMs (contributing 1,0 percentage point) and manganese ore (contributing 0,7 of a percentage point). Iron ore (contributing -1,7 percentage points) was a significant negative contributor.

Table A – Key growth rates in the volume of mining production for July 2013

	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13
Year-on-year % change, unadjusted	7,4	-3,8	0,2	-0,9	-5,4	0,6
Month-on-month % change, seasonally adjusted	-2,7	-4,8	2,5	4,3	-1,9	3,2
3-month % change, seasonally adjusted 1/	7,8	5,6	-1,8	-2,0	0,4	4,1

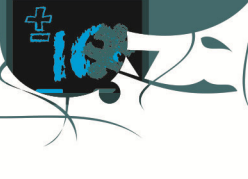
1/ Percentage change between the previous 3 months and the 3 months ending in the month indicated.
A full release on *Mining: Production and sales* (Statistical release P2041) is available on the Stats SA website: www.statssa.gov.za

Mineral sales decreased by 1,2% year-on-year in June 2013 (**see Table B**). Only gold (-42,2%) and iron ore (-6,1%) recorded negative growth rates, with contributions of -9,5 and -1,0 percentage points respectively.

Table B– Key growth rates in mineral sales for June 2013

	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13
Year-on-year % change, unadjusted	0,2	3,8	12,7	13,6	-8,0	-1,2
Month-on-month % change, seasonally adjusted	3,0	-1,5	2,1	-0,4	-10,7	4,7
3-month % change, seasonally adjusted 1/	6,2	12,9	10,5	4,8	-1,7	-5,2

1/ Percentage change between the previous 3 months and the 3 months ending in the month indicated.
 A full release on *Mining: Production and sales* (Statistical release P2041) is available on the Stats SA website: www.statssa.gov.za



Secondary industries

Manufacturing: Production and sales

Production in the manufacturing industry increases

The manufacturing industry, which accounts for 6% of the gross domestic products (GDP), has been experiencing some hardships since the strike started about a month ago. The strike in the motor automotive component manufacturing sector has had a negative impact on the labour market. As a result some manufacturers were forced to stop production as workers continued to demand higher wages and better shift allowances. The industry was also further hit when workers from fuel stations embarked on a strike. The strike has also had a negative impact on consumers as it meant that consumers had to wait for longer before their vehicles could be fixed due to a month-long waiting period for parts. The negative impact of the strike may not be obvious in the figures below as the strike took place in September 2013, and this article is reporting on the findings on the manufacturing industry for the month of July 2013.

Manufacturing production increased by 5,4% in July 2013 compared with July 2012 (**see Table C**). The 5,4% year-on-year increase in manufacturing production in July 2013 was mainly due to higher production in the following divisions:

- basic iron and steel, non-ferrous metal products, metal products and machinery (7,9%, contributing 1,6 percentage points);
- food and beverages (6,1%, contributing 1,3 of a percentage point);
- petroleum, chemical products, rubber and plastic products (3,9%, contributing 1,0 percentage point);
- motor vehicles, parts and accessories and other transport equipment (9,9%, contributing 0,9 of a percentage point);
- wood and wood products, paper, publishing and printing (5,6%, contributing 0,5 of a percentage point); and
- glass and non-metallic mineral products (7,2%, contributing 0,4 of a percentage point).



Table C – Manufacturing production and sales for July 2013

Estimates	July 2013	% change between July 2012 and July 2013	% change between May to July 2012 and May to July 2013	%change between January to July 2012 and January to July 2013
Physical volume of manufacturing production index (base: 2010=100)	111,7	5,4	2,7	2,1
Total estimated sales of manufactured products (R million)	143 630	14,5	9,7	8,4

A full release on *Manufacturing: Production and sales* (Statistical release P3041.2) is available on the Stats SA website: www.statssa.gov.za

Selected building statistics of the private sector

Value of recorded building plans increases

Statistics South Africa (Stats SA) conducts a monthly survey of metropolitan and local municipalities on building plans passed and buildings completed for the private sector. This includes residential and non-residential buildings as well as additions and alterations. An annual survey of the remaining municipalities is conducted regarding buildings completed. This article gives a summary of key statistics of selected buildings of the private sector for the month of July 2013.

The value of recorded building plans passed increased by 26,5% (R10 294,9 million) during January to July 2013 compared with January to July 2012 (**see Table D**). The biggest percentage increase was reported for non-residential buildings (45,8% or R4 114,6 million), followed by residential buildings (27,3% or R4 785,8 million) and additions and alterations (11,3% or R1 394,5 million).

Eight provinces reported year-on-year increases in the value of building plans passed during January to July 2013. The increase in the value of building plans passed was dominated by Gauteng (contributing 11,6 percentage points or R4 493,5 million).

The value of buildings reported as completed increased by 19,2% (R4 775,4 million) during January to July 2013 compared with January to July 2012.

The biggest percentage increase was reported for additions and alterations (27,0% or R1 615,8 million), followed by non-residential buildings (18,5% or R1 211,1 million) and residential buildings (15,7% or R1 948,5 million) during the aforementioned period.

Six provinces reported year-on-year increases in the value of buildings completed during January to July 2013. The year-on-year increase was dominated by Western Cape (contributing 15,1 percentage points or R3 755,6 million).

**Table D – Recorded building plans passed by larger municipalities:
January to July 2012 versus January to July 2013**

Estimates at current prices	January to July 2012 ^{1/}	January to July 2013 ^{1/}	Difference in value between January to July 2012 and January to July 2013	% change between January to July 2012 and January to July 2013
	R'000	R'000	R'000	
Residential buildings	17 510 986	22 296 825	4 785 839	27,3
-Dwelling houses	13 277 323	15 770 236	2 492 913	18,8
-Flats and townhouses	4 031 613	5 285 652	1 254 039	31,1
-Other residential buildings	202 050	1 240 937	1 038 887	514,2
Non-residential buildings	8 979 683	13 094 260	4 114 577	45,8
Additions and alterations	12 318 394	13 712 881	1 394 487	11,3
Total	38 809 063	49 103 966	10 294 903	26,5

^{1/} 2012 and 2013 figures should be regarded as preliminary because of possible backlogs and incomplete reporting by municipalities.

A full release on *Selected building statistics of the private sector as reported by local government institutions* (Statistical release P5041.1) is available on the Stats SA website: www.statssa.gov.za



Electricity generated and available for distribution

Electricity production and consumption decreases

Recent news about the construction of Eskom's first large-scale wind farm on land between Saldanha Bay and Koekenaap in the Western Cape signals an achievement in the country's efforts to reduce our carbon footprint and preserve the planet. The farm is expected to contribute 100 megawatts for the country's national electricity grid and help reduce our electricity generation carbon footprint by roughly 4,7 million tons in 20 years. This article presents electricity production and distribution statistics for August 2013, as released in October 2013.

The volume of electricity consumed decreased by 1,7% annually in August 2013, compared with August 2012. The actual volume of electricity consumed between the three months ended August 2013 increased by 1,2% compared with the three months ended August 2012 (**see Table E**).

Electricity production decreased by 1,1% annually in August 2013. Electricity production for the three months ended August 2013 decreased by 0,1% compared with the three months ended August 2012.

The total volume of electricity delivered by Eskom to the provinces increased by 1,6% (309 Gigawatt-hours) in August 2013 compared with August 2012. Increases were reported in five of the nine provinces, with the largest volume increase recorded for Mpumalanga (202 Gigawatt-hours), followed by KwaZulu-Natal (140 Gigawatt-hours). Gauteng recorded the largest volume decrease of 125 Gigawatt-hours over the same period.



Table E – Selected key figures regarding electricity generated and available for distribution – August 2013

Actual estimates	August 2013 ^{1/}	% change between August 2012 and August 2013	% change between June to August 2012 and June to August 2013	% change between January to August 2012 and January to August 2013
Electricity available for distribution (Gigawatt-hours)	20 689	1,7	1,2	-0,9
Index of the physical volume of electricity production (2010=100)	104,2	-1,1	-0,1	-0,2

^{1/} Preliminary.

A full release on *Electricity generated and available for distribution* (Statistical release P4141) is available on the Stats SA website: www.statssa.gov.za

Tertiary industries

Wholesale trade sales

Wholesale trade sales increases

In September 2013, Statistics South Africa (Stats SA) published results for the monthly survey of wholesale trade sales from a new sample drawn in April 2013 which replaced the previous sample that was drawn in April 2012. The sample was drawn from a business register of enterprises with an annual turnover (all the money that a business earned over a year) of at least R1 000 000 and that are registered with the South African Revenue Service (SARS) for value added tax. The new sample was drawn so that changes related to new, ceased and merged businesses and classification changes could be captured. This article presents a summary of wholesale trade sales statistics for the month of July 2013.

Wholesale trade sales increased by 14,8% in July 2013 compared with July 2012 (**see Table F**). The major contributors to this increase were dealers in:

- solid, liquid and gaseous fuels and related products (16,1% and contributing 3,7 percentage points);
- food, beverages and tobacco (12,6% and contributing 1,8 percentage points); and
- 'other' goods (16,1% and contributing 1,7 percentage points) –

Table F – Key growth rates in wholesale trade sales at current prices for July 2013

	Feb-13	Mar-12	April-13	May-13	Jun-13	Jul-13
Year-on-year % change, unadjusted	7,8	5,2	15,2	12,2	11,9	14,8
Month-on-month % change, seasonally adjusted	1,6	-0,1	0,1	3,7	-0,9	2,4
3-month % change, seasonally adjusted 1/	1,7	1,3	2,1	2,9	2,8	4,0

1/ Percentage change between the previous 3 months and the 3 months ending in the month indicated.

A full release on *Wholesale trade sales* (P6141.2) is available on the Stats SA website: www.statssa.gov.za



Retail trade sales

Retail trade sales up by 2,8%

With the festive season fast approaching, most retailers – particularly those dealing in food, clothing, and hardware – are preparing for a busy quarter leading up to December. Most people will be renovating their houses, buying new clothes and food for the festivities. As such, we can expect growth in the retail trade sales industry leading to and during the festive season. This article is based on the results of the *Retail trade sales* survey which is conducted on a monthly basis by Statistics South Africa. It presents the key findings of the survey for July 2013, as released in September 2013.

Retail trade sales increased by an annual 2,8% in July 2013 (**see Table G**). The highest annual growth rates were recorded for retailers in:

- hardware, paint and glass (10,3%);
- textiles, clothing, footwear and leather goods (8,9%); and
- food, beverages and tobacco in specialised stores (4,3%).

The main contributors to the 2,8% increase were retailers in textiles, clothing, footwear and leather goods (contributing 1,8 percentage points), retailers in hardware, paint and glass (contributing 0,8 of a percentage point) and retailers in food, beverages and tobacco in specialised stores (contributing 0,4 of a percentage point). Retail trade sales increased by 3,4% in the three months ended July 2013 compared with the three months ended July 2012. The main contributors to this increase were retailers in:

- textiles, clothing, footwear and leather goods (8,8%, contributing 1,8 percentage points);
- general dealers (1,8%, contributing 0,7 percentage point); and
- hardware, paint and glass (7,8%, contributing 0,6 of a percentage point).

Table G – Key growth rates in retail trade sales at constant 2012 prices for July 2013

	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13
Year-on-year % change, unadjusted	3,6	2,7	2,1	6,1	1,4	2,8
Month-on-month % change, seasonally adjusted	1,9	-0,8	-0,3	1,9	-0,5	-0,5
3-month % change, seasonally adjusted 1/	0,4	0,5	0,8	0,6	0,9	0,9

1/ Percentage change between the previous 3 months and the 3 months ending in the month indicated.

A full release on *Retail trade sales* (Statistical release P6242.1) is available on the Stats SA website: www.statssa.gov.za

Motor trade sales

Sales in the motor industry increase

The industrial action that lasted for almost a month in September 2013, although now over, had a negative effect on the motor industry. During this period seven of the major car manufacturers in South Africa temporarily shut down. The strike did not only cause the production loss of vehicles but also had a negative effect on the vehicle sales as well as loss of wages for metal workers. It is worth noting that for the purpose of capturing changes relating to new businesses, ceased businesses, merged businesses and classification changes, amongst other things, Statistics South Africa (Stats SA) is now publishing results of the monthly motor trade sales survey from a new sample drawn in April 2013. The survey replaces the previous sample that was drawn in April 2012. In this article we present motor trade sales statistics for the month of July 2013.



Motor trade sales increased by 13,2% year-on-year in July 2013 (see Table H). The highest annual growth rates were recorded for new vehicle sales (18,6%), workshop income (18,0%), fuel sales (14,1%) and sales of accessories (11,4%).

Motor trade sales increased by 8,8% in the three months ended July 2013 compared with the three months ended July 2012. The major contributors to this increase were:

- new vehicle sales (10,7%, contributing 3,1 percentage points);
- fuel sales (9,4%, contributing 2,4 percentage points);
- used vehicle sales (7,7%, contributing 1,3 percentage points); and
- sales of accessories (6,6%, contributing 1,2 percentage points).

Table H – Key figures for July 2013

	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13
Year-on-year % change, unadjusted	7,5	5,8	15,8	9,3	4,0	13,2
Month-on-month % change, seasonally adjusted	-0,9	2,3	0,9	1,1	-3,0	5,1
3-month % change, seasonally adjusted^{1/}	-0,8	2,0	2,8	4,2	1,8	2,1

1/ Percentage change between the previous 3 months and the 3 months ending in the month indicated.

A full release on *Motor trade sales* (Statistical release P6343.2) is available on the Stats SA website: www.statssa.gov.za



Food and beverages

Food and beverages income grows by 6,8%

In a country where over half of the gross domestic product (GDP) is constituted by household/consumer expenditure, industries such as those serving food and drinks are bound to flourish as their services and products represent the most basic needs of households. In 2012, this industry reported an annual income of over R45 billion, which constitutes just over 5,5% of the country's nominal GDP of R815 billion as measured in the 4th quarter of 2012 (October–December 2012). In this article we present the statistics relating to the performance of the food and beverages industry for July 2013.

The total income generated by the food and beverages industry increased by 6,8% in July 2013 compared with July 2012. Positive annual growth rates were recorded for bar sales (17,0%), other income (16,9%) and food sales (5,5%) (**see Table I**).

In July 2013, positive annual growth rates were recorded for catering services (8,5%, contributing 1,5 percentage points), takeaway and fast-food outlets (7,8%, contributing 2,8 percentage points) and restaurants and coffee shops (5,5%, contributing 2,5 percentage points).

Total income increased by 9,1% in the three months ended July 2013 compared with the three months ended July 2012. The main contributors to this increase were:

- takeaway and fast-food outlets (11,4%, contributing 4,1 percentage points); and
- restaurants and coffee shops (8,0%, contributing 3,6 percentage points).

Table I – Annual percentage change in food and beverages income at current prices by type of income – July 2013

Type of income	Feb-12	Mar-13	Apr-13	May-13	Jun-13	Jul-13
Food sales	5,7	10,2	7,4	12,1	7,7	5,5
Bar sales	18,6	16,2	8,0	15,2	12,7	17,0
Other income	33,0	17,9	2,2	9,4	14,4	16,9
Total	7,6	11,0	7,3	12,3	8,4	6,8

A full release on *Food and beverages* (Statistical release P6420) is available on the Stats SA website: www.statssa.gov.za



Tourist accommodation

May tourist accommodation income increases

Even though the tourist accommodation industry draws most of its business from providing accommodation services, some of its income is generated from other services provided to guests such as restaurants and bar sales. This article presents the statistics of the tourist accommodation industry with focus on income generated from accommodation, the overall income generated by the industry (including income for services other than accommodation) and the percentage change in the average income per stay unit night sold over the six months period from February to July 2013.

Total income for the tourist accommodation industry increased by 10,3% in July 2013 compared with July 2012, income from accommodation increased by an annual 11,2% in July 2013 – the result of a 3,6% increase in the number of stay unit nights sold and a 7,4% increase in the average income per stay unit night sold (see **Table J**).

The type of accommodation with the highest annual growth rates in July 2013 was 'other' accommodation (15,4%), followed by hotels (10,5%).

The main contributors to the 11,2% annual increase in income from accommodation in July 2013 were hotels (contributing 6,8 percentage points) and 'other' accommodation (contributing 4,1 percentage points).

Table J – Year-on-year percentage change in tourist accommodation statistics (July 2013)

	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13
Stay units available	1,4	0,4	0,5	0,4	0,4	0,0
Stay unit nights sold	6,8	10,2	0,5	4,9	1,1	3,6
Average income per stay unit night sold	7,4	10,4	7,8	5,2	6,1	7,4
Income from accommodation	14,7	21,6	8,3	10,4	7,3	11,2
Total income 1/	13,4	22,0	11,1	13,7	9,7	10,3

^{1/} Includes restaurant and bar sales and 'other' income.

A full release on *Tourist accommodation* (Statistical release P6410) is available on the website: www.statssa.gov.za



Tourism and migration

Nearly 3 million travellers pass through South African ports

South Africa is a country with ample and diverse tourist attractions – the diversity in the tourist attractions and cultures of our people also serves as any attraction to tourists from various nations across the world. This country is also blessed with world class learning institutions and an enabling environment for conducting business. In this article we discuss the statistics of tourism and migration for June 2013, paying attention to the number of travellers crossing South Africa's borders, the purpose of their visits, and their age among others.

A total of 2 994 033 travellers (arrivals and departures) passed through South African ports of entry in June 2013 (**see Table K**). These travellers were made up of 892 341 South African residents and 2 101 692 foreign travellers. A further breakdown of the figures for South African residents indicates that there were 406 096 arrivals and 486 245 departures. The corresponding volumes for foreign arrivals and departures were 1 109 391 and 992 301 respectively.

In June 2013, road transport was the most common mode of travel used by 2 213 514 (73,9%) out of the 2 994 033 travellers. The total number of travellers who used air transport was 775 122 (25,9%).

In June 2013, 140 962 (90,0%) overseas tourists arrived in the country by air whilst 15 471 (9,9%) came in by road. This is in contrast to the number of tourists from the Southern African Development Community (SADC) countries who came into South Africa predominantly by road [464 083 (92,4%)]. Only 38 386 (7,6%) tourists from the SADC countries came in by air. The number of tourists who came into South Africa by air from 'other' African countries was 15 107 (90,8%), with 1 520 (9,1%) using road transport.

The majority [619 034 (91,4%)] of tourists were in South Africa for holidays compared to only 40 789 (6,0%), 14 002 (2,1%), and 3 260 (0,5%) of tourists who were in South Africa in transit; for business and for study purposes respectively. A detailed analysis reveals that, of the tourists from each of the overseas regions, at least 56,0% came to South Africa for holidays.

There were 386 552 (57,1%) male and 289 781 (42,8%) female tourists in June 2013. The majority 620 952 (91,7%) of tourists were aged between 15 and 64 years; 24 265 (3,6%) were aged 65 years and older, and 31 398 (4,6%) were aged younger than 15 years.

Table K – Number of South African residents and foreign travellers by travel direction: June 2013

Travel direction	June	May	June	% change	% change
	2012	2013	2013	June 2012 to June 2013	May 2013 to June 2013
Total	2 739 165	2 896 534	2 994 033	9,3	3,4
South African residents	826 046	749 569	892 341	8,0	19,0
Arrivals	366 698	368 172	406 096	10,7	10,3
Departures	459 348	381 397	486 245	5,9	27,5
Foreign travellers	1 913 119	2 146 965	2 101 692	9,9	-2,1
Arrivals	1 024 768	1 133 427	1 109 391	8,3	-2,1
Departures	888 351	1 013 538	992 301	11,7	-2,1
Foreign arrivals	1 024 768	1 133 427	1 109 391	8,3	-2,1
Non-visitors	54 182	61 015	63 019	16,3	3,3
Visitors	970 586	1 072 412	1 046 372	7,8	-2,4
Visitors	970 586	1 072 412	1 046 372	7,8	-2,4
Arrivals only	341 434	322 517	333 037	-2,5	3,3
Single trips	345 490	408 873	389 785	12,8	-4,7
Multiple trips	283 662	341 022	323 550	14,1	-5,1
Visitors	970 586	1 072 412	1 046 372	7,8	-2,4
Same-day	316 900	372 754	369 287	16,5	-0,9
Overnight (tourists)	653 686	699 658	677 085	3,6	-3,2

A full release on *Tourism and migration* (Statistical release P0351) is available on the Stats SA website: www.statssa.gov.za



Statistics of civil cases for debt

Number of civil judgements decrease

The latest TransUnion consumer credit index shows that South Africa's consumer loan defaults continue to rise. As prices of food and services continue to be high, it makes it more difficult for many consumers to pay back their loans on time. This results in consumers being blacklisted. However, Cabinet agreed to credit amnesty, which will see to the cancelling of any consumer credit information held by credit bureaus. The idea behind the amnesty is to remove those who have been blacklisted in order to open up access to credit to those who can afford it. These include amongst others, those consumers who have paid their debt in full, but cannot be given credit because of a bad credit record. In this article we present the civil cases for debt for July 2013.

The total number of civil summonses issued for debt reflected a 9,1% decrease in the three months ended July 2013 compared with the three months ended July 2012 (**see Table L**). A 5,6% increase was recorded between July 2012 and July 2013.

The categories that contributed to the 9,1% decrease were:

- money lent (contributing -3,2 percentage points);
- 'other' debts (contributing -3,1 percentage points); and
- services (contributing -2,5 percentage points).

The total number of civil judgements recorded for debt decreased by 17,7% in the three months ended July 2013 compared with the three months ended July 2012. A year-on-year decrease of 18,1% was recorded in July 2013 compared with July 2012.

The categories that influenced the 17,7% decrease were civil judgements relating to:

- money lent (contributing -7,7 percentage points);
- goods sold (contributing -5,2 percentage points); and
- services (contributing -1,9 percentage points).

The total value of civil judgements recorded for debt was 4,7% higher in the three months ended July 2013 compared with July 2012. A year-on-year decrease of 6,5% was recorded in July 2013.

The major contributors to the 4,7% increase was the goods sold category (contributing -5,4 percentage points).

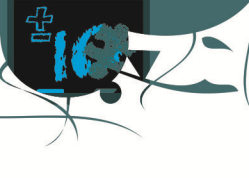
In July 2013, 32 217 civil judgements for debt amounting to R411,5 million were recorded. The largest contributors to the total value of judgements were:

- 'other' debts (R112,6 million or 27,4%);
- money lent (R104,9 million or 25,5%); and
- services (R76,4 million or 18,6%).

Table L – Key figures for July 2013

Actual estimates	July 2013	% change between July 2012 and July 2013	% change between May - Jul 2012 and May - Jul 2013
Number of civil summonses issued for debt	78 908	5,6	-9,1
Number of civil judgements recorded for debt	32 217	-18,1	-17,7
Value of civil judgements recorded for debt (R million)	411,5	-6,5	-4,7

A full release *Statistics of civil cases for debt* (Statistical release P0041) is available on the Stats SA website: www.statssa.gov.za



Statistics of liquidations and insolvencies

15,8% fewer companies closed in August 2013

Since the introduction of the new Companies Act, 2008 (Act No. 71 of 2008) in April 2011, less businesses are closed as a result of financial distress or other conditions. Mechanisms such as ‘business rescue’, which were introduced by the Act, encourage applying strategies that avoid liquidation including halting most legal actions against the affected company, appointing a practitioner who will carry out a business rescue plan, and restructuring, where deemed necessary. This article presents the statistics of liquidations for August 2013 and insolvencies for July 2013.

The total number of liquidations decreased by 15,8% in August 2013 compared with August 2012 (**see Table M**). In August 2013, there were 19 compulsory liquidations and 184 voluntary liquidations.

The largest contributors to the annual decrease in August 2013 related to businesses in the following industries:

- financing, insurance, real estate and business services (80 liquidations or 39,4%);
- wholesale and retail trade, catering and accommodation (56 liquidations or 27,6%); and
- community, social and personal services (33 liquidations or 16,3%).

The number of liquidations recorded in the first eight months of 2013 decreased by 5,1% compared with the corrected period in 2012.

Table M – Total number of liquidations for August 2013

Number of liquidations August 2013	% change between August 2012 and August 2013	% change between June to August 2012 and June to August 2013	% change between January to August 2012 and January to August 2013
203	-15,8	-1,8	-5,1



The estimated number of insolvencies increased by 2,4% annually in July 2013 (**see Table N**). A decrease of 4,4% was recorded in the three months ended July 2013 compared with the three months ended July 2012.

The number of insolvencies decreased by 16,5% in the first seven months of 2013 compared with the first seven months of 2012.

Table N – Total number of insolvencies for July 2013

Number of insolvencies July 2013	% change between July 2012 and July 2013	% change between May to July 2012 and May to July 2013	% change between January to July 2012 and January to July 2013
304	2,4	-4,4	-16,5

A full release on *Statistics of liquidations and insolvencies* (Statistical release P0043) is available on the Stats SA website: www.statssa.gov.za

Land transport survey

The number of passenger journeys increase increases

October is transport month. The transport month became a formal campaign in 2005 during the Transport Lekgotla. The purpose of this campaign is to raise awareness on the role the transport plays in the economy of the country. People are encouraged to use public transport instead of their own private transport. Some of the initiatives by government to improve the public transport include Gautrain, the Bus Rapid Transit (BRT), currently operational in Johannesburg known as *Rea Vaya* and now the construction works for the *A re Yeng* BRT system which will be operational in Tshwane are in progress. By using this type of reliable and safe transport service, commuters participate in lowering carbon emissions from private cars, and decreasing congestion on the city's roads. This article presents the latest figures on freight and passenger transport for July 2013.

Freight transport

The volume of goods transported (payload) decreased by 3,8% in July 2013 compared with July 2012 (**see Table O**). The corresponding income increased by 11,2% over the same period.

**Table O – Year-on-year percentage change in freight transportation**

	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13
Freight payload	3,8	0,4	7,9	-0,2	-2,7	3,8
Freight income	6,0	3,2	18,3	18,3	6,8	11,2

Income from freight transportation increased by 10,5% in the three months ended July 2013 compared with the three months ended July 2012. The main contributors to this increase were:

- 'other' freight (30,5%, contributing 2,8 percentage points);
- primary mining and quarrying products (7,7%, contributing 2,5 percentage points); and
- containers (16,5%, contributing 1,1 percentage point).

Passenger transport

The number of passenger journeys remained stable between July 2012 and July 2013 while the income the income increased by 10,2% over the same period (see **Table P**).

Table P – Year-on-year percentage change in passenger transportation

	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13
Passenger journey	5,2	-0,4	-1,3	-15,6	2,7	0,0
Passenger income	16,2	17,1	-6,3	-16,8	8,8	10,2

A full release on *Land transport survey* (Statistical release P7162) is available on the Stats SA website: www.statssa.gov.za

Prices

Producer price index (PPI)

PPI for August 2013 at 6,7%

PPI has been increasing for the past three months (from 5,9% in June, 6,6% in July and finally landing at 6,7% in August 2013). An increase in PPI means that the cost of goods at factory gates has increased. This also means that there is a possibility that the cost of goods in the CPI basket might increase. Eventually, this increase will be felt by the consumers who will have to purchase certain goods at a higher price. This article gives a summary of key findings relating to PPI for the month of August 2013.

Final manufactured goods – headline PPI

The annual percentage change in the PPI for final manufactured goods was 6,7% in August 2013 compared with 6,6% in July 2013 (**see Table Q**). The main contributors to the annual rate increase of 6,7% were food products, beverages and tobacco products (6,5% year-on-year and contributing 2,2 percentage points) and coke, petroleum, chemical, rubber and plastic products (8,2% year-on-year and contributing 1,4 percentage points).

From July 2013 to August 2013, PPI figures for final manufactured goods increased by 0,8%. The main contributors to the monthly increase of 0,8% were:

- food products, beverages and tobacco products (0,5% month-on-month, contributing 0,2 of a percentage point);
- coke, petroleum, chemical, rubber and plastic products (1,4% month-on-month, contributing 0,2 of a percentage point); and
- electrical machinery and apparatus and computing equipment (4,0% month-on-month, contributing 0,2 of a percentage point).



Intermediate manufactured goods

The annual percentage change in the PPI for intermediate manufactured goods was 11,1% in August 2013 compared with 9,4% in July 2013 (**see Table Q**). The main contributors to the annual rate of 11,1% were basic and fabricated metals (14,7% year-on-year, contributing 4,2 percentage points) and chemicals, rubber and plastic products (9,7% year-on-year, contributing 4,0 percentage points).

From July 2013 to August 2013 the PPI for intermediate manufactured goods increased by 1,9%. The main contributors to the monthly increase of 1,9% were basic and fabricated metals (2,8% month-on-month, contributing 0,8 of a percentage point) and chemicals, rubber and plastic products (1,6% month-on-month, contributing 0,6 of a percentage point).

Electricity and water

The annual percentage change in the PPI figures for electricity and water was 3,6% in August 2013 compared with 5,6% in July 2013 (**see Table Q**). The contributors to the annual rate of 3,6% were electricity (4,0% year-on-year and contributing 3,5 percentage points) and water (10,5% year-on-year, contributing 1,2 percentage points). From July 2013 to August 2013 the PPI for electricity and water decreased by 1,6%. The main contributor to the monthly decrease of 1,6% was electricity (-1,9% month-on-month, contributing -1,7 percentage points).

Mining

The annual percentage change in the PPI for mining was 10,4% in August 2013 (compared with 7,0% in July 2013) (**see Table Q**). The main contributor to the annual rate of 10,4% was non-ferrous metal ores (16,5% year-on-year, contributing 7,4 percentage points). From July 2013 to August 2013, the PPI for mining increased by 3,9%. The main contributors to the monthly increase of 3,9% were non-ferrous metal ores (4,0% month-on-month, contributing 1,9 percentage points) and gold and other metal ores (6,0% month-on-month, contributing 1,3 percentage points).

Agriculture, forestry and fishing

The annual percentage change in the PPI for agriculture, forestry and fishing was 3,5% in August 2013 compared with 1,4% in July 2013 (see Table Q). The main contributor to the annual rate of 3,5% was agriculture (3,2% year-on-year, contributing 2,5 percentage points). From July 2013 to August 2013, the PPI for agriculture, forestry and fishing increased by 1,0%. The main contributor to the monthly increase of 1,0% was agriculture (1,2% month-on-month, contributing 0,9 of a percentage point).

Table Q – Key PPI figures for August 2013

Product	Weight	Index (2012=100)			% change	
		Aug 2012	Jul 2013	Aug 2013	Aug 2013 vs. Jul 2013	Aug 2013 vs. Aug 2012
Final manufactured goods	100,00	100,5	106,4	107,2	0,8	6,7
Intermediate manufactured goods	100,00	99,4	108,3	110,4	1,9	11,1
Electricity and water	100,00	139,8	147,3	144,9	-1,6	3,6
Mining	100,00	98,0	104,1	108,2	3,9	10,4
Agriculture, forestry and fishing	100,00	97,0	99,4	100,4	1,0	3,5

A full release on the *Producer price index* (Statistical release P0142.1) is available on the Stats SA website: www.statssa.gov.za

Consumer price index

Increase in consumer prices

With consumer spending representing a large part of our economy, increases in consumer prices – though bad for consumers – may signal an increase in the country's economic outputs. The official gross domestic product of the country's economy may grow as a result of increased prices even when production does not increase significantly. This article presents the consumer price index for August 2013.

The headline CPI (for all urban areas) annual inflation rate in August 2013 was 6,4%. This rate was 0,1 of a percentage point lower than the corresponding annual rate of 6,3% in July 2013 (see Table R). On average, prices increased by 0,3% between July 2013 and August 2013.



The food and non-alcoholic beverages index increased by 0,3% between July 2013 and August 2013. The annual rate increased to 7,1% in August 2013 from 6,8% in July 2013. The following components in the food and non-alcoholic beverages index increased:

- oils and fats (1,7%);
- hot beverages (1,4%);
- bread and cereal (1,1%);
- milk, eggs and cheese (0,6%);
- fish (0,5%);
- sugar, sweets and desserts (0,4%);
- cold beverages (0,3%); and
- fruit (0,1%).

Despite the above increases, vegetables (-1,1%) and meat (-0,2%) components decreased.

The housing and utilities index increased by 0,1% between July 2013 and August 2013. The annual rate decreased to 5,4% in August 2013 from 5,5% in July 2013.

The transport index increased by 1,0% between July 2013 and August 2013, mainly due to a 32c/litre increase in the price of petrol. The annual rate increased to 8,7% in August 2013 from 8,2% in July 2013.

The communication index increased by 0,3% between July 2013 and August 2013. The annual rate increased to 2,0% in August 2013 from 3,4% in July 2013.

The recreation and culture index increased by 0,2% between July 2013 and August 2013. The annual rate increased to 3,6% in August 2013 from 3,4% in July 2013.

The provinces with an annual inflation rate lower than or equal to headline inflation were KwaZulu-Natal (6,4%), Western Cape (6,0%), North West (5,9%), Mpumalanga (5,9%), and Eastern Cape (5,8%). The provinces with an annual inflation rate higher than headline inflation were Limpopo (7,0%), Northern Cape (6,8%), Free State (6,7%) and Gauteng (6,5%).

Table R – Consumer price index: Index numbers and year-on-year rates
Base year: December 2012 = 100

Year		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg ^{1/}
2010	Index	86,4	87,0	87,7	87,8	88,0	88,0	88,6	88,6	88,7	88,9	89,0	89,2	88,2
	Rate	6,2	5,7	5,1	4,8	4,6	4,2	3,7	3,5	3,2	3,4	3,6	3,5	4,3
2011	Index	89,6	90,2	91,3	91,6	92,0	92,4	93,2	93,4	93,8	94,2	94,5	94,6	92,6
	Rate	3,7	3,7	4,1	4,2	4,6	5,0	5,3	5,3	5,7	6,0	6,1	6,1	5,0
2012	Index	95,2	95,7	96,8	97,2	97,2	97,5	97,8	98,0	98,9	99,5	99,8	100,0	97,8
	Rate	6,3	6,1	6,0	6,1	5,7	5,5	4,9	5,0	5,5	5,6	5,6	5,7	5,6
2013	Index	100,3	101,3	102,5	102,9	102,6	102,9	104,0	104,3					
	Rate	5,4	5,9	5,9	5,9	5,6	5,5	6,3	6,4					

^{1/} Annual average.

A full release on *Consumer price index* (Statistical release P0141) is available on the Stats SA website: www.statssa.gov.za



Glossary

Primary industries

Gigawatt-hour (gWh): one gigawatt-hour of electricity is equal to one million kilowatt-hours. A kilowatt-hour is the basic unit of electrical energy equal to one kilowatt of power supplied to or taken from an electric circuit steadily for one hour. One kilowatt-hour equals one thousand watt-hours.

Index of physical volume of manufacturing production: also known as a production index, is a statistical measure of the change in the volume of production. The production index of a major group is the ratio between the volume of production of a major group in a given period and the volume of production of the same major group in the base period.

Index of physical volume of mining production: a statistical measure of the change in the volume of production. The production index of a mineral group is the ratio between the volume of production of a mineral group in a given period and the volume of production of the same mineral group in the base period.

Index of the physical volume of electricity production: a statistical measure of the change in the volume of production of electricity in a given period and the volume of production of electricity in the base period.

Industry: a group of establishments engaged in the same or similar kinds of economic activity.

PGMs – Platinum group metals: include platinum; iridium; osmiridium, palladium; rhodium; ruthenium and osmium.

Sales: total value of sales and transfers-out of goods mined by the mining establishments and the amounts received for installation, erection or assembly or other services.



Secondary industries

Additions and alterations: extensions to existing buildings as well as internal and external alterations of existing buildings.

Blocks of flats: a structure, usually multi-storey, consisting of a number of dwellings sharing the same residential address, and usually sharing a common entrance, foyer or staircase.

Dwelling houses: a free-standing, complete structure on a separate stand or a self-contained dwelling-unit, e.g. granny flat, on the same premises as existing residence. Out-buildings and garages are included.

Other residential buildings: include institutions for the disabled, boarding houses, old age homes, hostels, hotel, motels, guest houses, holiday chalets, bed and breakfast accommodation, entertainment centres and casinos.

Residential buildings: dwelling houses, flats, townhouses and other residential buildings.

Tertiary industries

Acknowledgements of debt: a statement by a person/debtor in which he admits that he owes money to an individual or a company or a bank.

Average income per stay unit night sold: average rate per stay unit (i.e. rate per room in a hotel or powered site in a caravan park) is calculated by dividing the total income from accommodation by the number of stay unit nights sold in the survey period.

Catering services: enterprises involved in the sale and supply of meals and drinks prepared on the premises on a contract basis and brought to other premises chosen by the person ordering them, to be served for immediate consumption to guests or customers. Include bars, taverns, other drinking places, ice-cream parlours, etc.



Civil judgements: decisions taken in a civil matter or a dispute between two people or parties.

Civil summonses: notices to appear before the court of law where a dispute between two parties or people has to be heard, i.e. not for criminal offence.

Enterprise: a legal entity or a combination of legal units that includes and directly controls all functions necessary to carry out its sales activities.

Foreign traveller: a person who resides outside South Africa and visits the country temporarily.

Income from accommodation industry: income from amounts charged for rooms or equivalent. Other income is excluded (e.g. income from meals).

Income from bar sales: refers to income from liquor sales.

Income from food sales: refers to income from the sale of meals and non-alcoholic drinks.

Income from restaurant and bar sales: income from meals, banqueting and beverages and tobacco sales.

Insolvency: refers to an individual or partnership which is unable to pay its debt and is placed under final sequestration. The number of insolvencies does not refer to the number of persons involved, as a partnership which is unable to pay its debt is regarded as one insolvency, irrespective of the number of partners.

Liquidation: refers to the winding-up of the affairs of a company or close corporation when liabilities exceed assets and it can be resolved by voluntary action or by an order of the court.

Microdata: data gathered on a small scale, such as data on an individual.

‘Other’ African countries: refers to all non SADC African countries.

Other income: includes all income not earned from food sales or bar sales.





Other SADC: refers to the thirteen countries, excluding South Africa, that belong to the Southern African Development Community.

Professional services: refer to medical doctors, dentists, advocates, attorney, auditors, accountants, architects, engineers, hospital services etc.

Promissory notes: written undertaking, signed by a person or party, to pay money to another person or to be the bearer of such a note on a specific date or on demand.

Restaurants and coffee shops: enterprises involved in the sale and provision of meals and drinks, ordered from amenu, prepared on the premises for immediate consumption and with provided seating.

Retailer: a retailer is an enterprise deriving more than 50% of its turnover from sales of goods to the general public for household use.

Retail trade: includes the resale (sale without transformation) of new and used goods and products to the general public for household use.

Stay unit: unit 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 night sold: total number of stay units occupied on each night during the survey period.

Takeaway and fast-food outlets: enterprises involved in the sale and provision of meals and drinks, ordered from a menu, prepared on the premises for takeaway purposes in a packaged format, at a stand or in a location, with or without provided seating.

Total income: includes income from food sales, income from bar sales and other income.

Tourism: comprises the activities of persons travelling to, and staying in places outside their usual environment, for not more than one consecutive year, for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.

Tourist: a visitor who stays at least one night in the place visited.



Traveller: any person on a trip between two or more countries or between two or more localities within his/her country of residence.

Voluntary liquidation: takes place when a company or close corporation, by own choice, resolves to wind-up its affairs.

Wholesale trade: Includes the resale (sale without transformation) of new and used goods and products to other wholesalers, retailers, agricultural, industrial, commercial, institutional and professional users either directly or through agents on a fee or contract basis.

Prices

Annual percentage change: change in the index of the relevant month of the current year compared with the index of the same month in the previous year expressed as a percentage.

Consumer price index (CPI): an index that measures the price of a fixed basket of consumer goods and services.

Inflation rate: annual percentage change in the CPI for all items of the relevant month of the current year compared with the CPI for all items of the same month in the previous year expressed as a percentage.

Monthly percentage change: change in the index of the relevant month compared to the index of the previous month expressed as a percentage.

Year-on-year: A term used frequently in investment research and other reports to mean 'compared with the same period in the previous fiscal year'



the missing piece of the puzzle





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