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Report on Quarterly Survey of Restaurant Receipts and Purchases

2nd Quarter 1991

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As from the second quarter of 1991, indexes of restaurant receipts have adopted the new base period of October 1989 to September 1990 (quarterly average index in the period being taken as 100). The rebased volume indexes are derived using updated price deflators, which have also adopted the same new base period.

2. According to the provisional survey results, the value of total receipts for the entire restaurant sector in the second quarter of 1991, estimated at \$9,116.7 million, was 8.3% higher than in the same quarter of 1990, while the volume was 4.2% lower. The value of total purchases by restaurants in the second quarter of 1991, estimated at \$3,430.1 million, was 3.6% higher than in the same quarter of 1990.

3. Analysed by type of restaurant, the value of total receipts for fast food shops, "other eating and drinking places" (comprising herb tea shops, creameries and other outlets selling bean curd jelly, etc.), bars, Chinese restaurants and non-Chinese restaurants in the second quarter of 1991 went up by 29.3%, 27.5%, 9.5%, 6.2% and 4.4% respectively when compared with the second quarter of 1990. In volume terms, the total receipts of fast food shops and "other eating and drinking places" increased by 16.0% and 14.3% respectively, while those for bars, Chinese restaurants and non-Chinese restaurants decreased by 4.3%, 6.5% and 7.1% respectively.

4. Comparing the first half of 1991 with the same period in 1990, total restaurant receipts increased by 7.8% in value but decreased by 4.9% in volume; and the value of total purchases by restaurants rose by 4.4%. In value terms, increases were recorded for "other eating and drinking places", fast food shops, bars, Chinese restaurants and non-Chinese restaurants at 24.8%, 23.5%, 7.5%, 6.1% and 5.6% respectively. In volume terms, total receipts of "other eating and drinking places" and fast food shops rose by 12.2%, and 10.4% respectively; while those of bars, non-Chinese restaurants and Chinese restaurants dropped by 4.4%, 6.3% and 6.8% respectively.

5. Comparing the second quarter of 1991 with the preceding quarter, and bearing in mind that this comparison may be affected by seasonal factors, total restaurant receipts decreased by 1.8% in value and 4.5% in volume, while the value of total purchases by restaurants fell by 5.6%. In value terms, total receipts of fast food shops, "other eating and drinking places", bars and non-Chinese restaurants increased by 20.0%, 17.5%, 3.9% and 2.0% respectively, while the total receipts of Chinese restaurants decreased by 6.2%. In volume terms, total receipts of fast food shops and "other eating and drinking places" increased by 16.8%, and 11.7% respectively, while those of non-Chinese restaurants, bars and Chinese restaurants decreased by 0.8%, 1.7% and 8.8% respectively.

6. Table 1 presents the revised figures for the total receipts and total purchases of the entire restaurant sector for the first quarter of 1991 and the provisional figures for the second quarter of 1991. Table 2 shows the new value and volume indexes of total receipts by type of restaurant for the first quarter and the second quarter of 1991, with the quarterly average from October 1989 to September 1990 taken as 100. Also tabulated are comparisons of the second quarter of 1991 results with those for the first quarter of 1991 and those for the second quarter of 1990; comparisons of total receipts for the first half of 1991 with the same period in 1990 are also given. Table 3 presents the total restaurant receipts and the new restaurant receipts index series from 1986 to the second quarter of 1991. Chart 1 depicts the movements of the value and volume indexes of total receipts by type of restaurant from the first quarter of 1988 to the second quarter of 1991.

TABLE 1 : TOTAL RESTAURANT RECEIPTS AND PURCHASES

		1st qtr. 1991 (Revised figures)	2nd qtr. 1991 (Provisional figures)
Total restaurant receipts	(in HK\$ million)	9 282.1	9 116.7
Total purchases by restaurants	(in HK\$ million)	3 633.6	3 430.1

TABLE 2 : VALUE AND VOLUME INDEXES OF TOTAL RESTAURANT RECEIPTS FOR 1st QUARTER 1991 AND 2nd QUARTER 1991

(Quarterly average of Oct. 89 - Sep. 90 = 100)

Type of restaurant	Index of total restaurant receipts	1st quarter	2nd quarter	2nd qtr. 1991 compared with 1st qtr. 1991		2nd qtr. 1991 compared with 2nd qtr. 1990		1st-2nd qtr. 1991 compared with 1st-2nd qtr. 1990	
		1991	1991	Points	%	Points	%	Points	%
Chinese restaurants	Value	109.0	102.2	-6.8	-6.2	+6.0	+6.2	+6.1	+6.1
	Volume	96.9	88.3	-8.6	-8.8	-6.2	-6.5	-6.8	-6.8
Non-Chinese restaurants	Value	104.2	106.3	+2.1	+2.0	+4.5	+4.4	+5.6	+5.6
	Volume	92.9	92.1	-0.8	-0.8	-7.1	-7.1	-6.3	-6.3
Fast food shops	Value	109.8	131.8	+22.0	+20.0	+29.8	+29.3	+23.0	+23.5
	Volume	99.6	116.3	+16.7	+16.8	+16.1	+16.0	+10.2	+10.4
Bars	Value	102.0	106.0	+3.9	+3.9	+9.2	+9.5	+7.3	+7.5
	Volume	93.6	92.0	-1.6	-1.7	-4.1	-4.3	-4.3	-4.4
Other eating and drinking places	Value	113.1	132.9	+19.8	+17.5	+28.7	+27.5	+24.4	+24.8
	Volume	104.8	117.1	+12.3	+11.7	+14.6	+14.3	+12.1	+12.2
Entire restaurant sector	Value	108.0	106.1	-1.9	-1.8	+8.1	+8.3	+7.7	+7.8
	Volume	96.3	92.0	-4.3	-4.5	-4.1	-4.2	-4.9	-4.9

TABLE 3 : VALUE OF TOTAL RESTAURANT RECEIPTS AND INDEX OF RESTAURANT RECEIPTS

Year/quarter	Value of total restaurant receipts (\$ million)	Index of Restaurant Receipts (Quarterly average of October 1989 - September 1990 = 100)											
		Entire restaurant sector		Chinese restaurants		Non-Chinese restaurants		Fast food shops		Bars		Other eating and drinking places	
		Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume
1986	20,223.6	58.8	88.3	61.0	93.6	55.1	80.5	48.1	66.5	71.6	85.5	72.4	101.3
1987	23,850.4	69.4	99.1	72.9	106.3	63.1	86.9	55.3	74.0	78.7	90.2	82.5	108.7
1988	27,284.7	79.4	103.1	82.0	108.2	75.0	94.4	68.9	86.5	82.4	91.2	87.1	109.4
1989	31,524.4	91.7	102.5	93.2	104.9	88.7	98.2	87.7	96.3	87.0	91.3	98.9	105.7
1990	35,310.9	102.7	99.3	102.8	99.3	102.2	98.8	103.4	100.2	102.3	100.1	104.0	102.6
1989 : 3rd qtr.	8,063.4	93.8	102.4	93.1	102.1	95.5	103.9	96.1	103.1	87.0	90.2	108.7	113.8
4th qtr.	8,466.0	98.5	104.0	99.7	105.0	95.6	102.3	95.4	100.6	104.7	107.0	93.7	96.1
1990 : 1st qtr.	8,654.0	100.7	102.1	102.8	104.3	97.6	98.4	93.6	95.2	96.7	98.0	92.9	95.2
2nd qtr.	8,417.6	97.9	96.0	96.2	94.5	101.8	99.2	101.9	100.2	96.8	96.1	104.2	102.4
3rd qtr.	8,838.4	102.8	97.9	101.3	96.3	105.0	100.2	109.0	103.9	101.8	98.8	109.1	106.2
4th qtr.	9,400.9	109.4	101.3	110.8	102.2	104.4	97.6	109.0	101.4	113.7	107.6	109.9	106.7
1991 : 1st qtr.	9,282.1	108.0	96.3	109.0	96.9	104.2	92.9	109.8	99.6	102.0	93.6	113.1	104.8
2nd qtr.+	9,116.7	106.1	92.0	102.2	88.3	106.3	92.1	131.8	116.3	106.0	92.0	132.9	117.1

+ provisional figures

Chart 1: Value and Volume Indexes of Restaurant Receipts
 (Quarterly average of Oct. 1989 — Sept. 1990 = 100)

