New Developments in Australia’s Tourism Satellite Account

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An overview of today’s presentation

Background
Results
What’s new
Future work
Australia’s TSA - background

Australia’s TSA is critical for measuring industry progress

- **Benchmark** for measuring tourism’s economic contribution to Australia’s economy
- **Relies** on the acceptance of key standards such as SNA2008, TSA:RMF2008, ANZSIC2006, IRTS 2008
- **Solid research base** with employment the current focus
- **User funded** by Commonwealth Government
- **Critical** for a range of research

The information flows are critical for a range of purposes

- Benchmarking
- CGE modelling
- Research base
- Briefings and engagement
Australia’s TSA - background

*Tourism* is not an *industry* in the conventional sense -- we must stitch together parts of many industries in compiling the TSA.

*Because tourism activity is a "demand" concept a TSA must be built up using tourism consumption data. Tourist products are then mapped to the industries that supply them.*

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**Every third year** the TSA estimates are compiled (or benchmarked) using:

- The National Accounts “supply and use tables” – **tell us which industries’ supply which products**
- Industry collections (such as Economic Activity Survey)
- Visitor expenditure surveys, i.e. IVS, NVS
- HFCE/GFCE to calculate imputations annually
- Labour Force Survey
- Net overseas migration data
Australia’s TSA - background

Years in-between benchmarks (updates) are extrapolated using the benchmark relationships and applying them to tourism consumption data:

- Industry collections (such as Economic Activity Survey)
- Visitor expenditure surveys, i.e. IVS, NVS
- HFCE/GFCE to calculate imputations annually
- Labour Force Survey
- Net overseas migration data

Australia’s TSA – what’s new?

2010-11 TSA released on 21 December 2011

- Additional analysis and interactive design of the publication
- Interactive graphics on the website
- Introduction of part-time / full-time employment estimates by industry
- Tourism industry contribution to part-time / full-time employment
Australia’s TSA – labour force data

Improved tourism labour force data

- Tourism employment estimates are calculated by applying the tourism value added ratios for each industry to Labour Force Survey (LFS) estimates
- The labour force estimates are also supplemented by employment data in relevant employment based surveys
- An assumption is made that the LFS distribution of part-time and full-time employment from within a given industry is consistent with the distribution of part-time and full-time employment within the tourism share of that particular industry

Australia’s TSA – what’s new?

Improved labour force data - methodology

1. Tourism employment estimates are calculated by applying the tourism value added ratios for each industry to Labour Force Survey (LFS) estimates
2. Part-time and full-time employment ratios are derived for each tourism characteristic and connected industry using Labour Force Survey (LFS) ratios
3. Part-time and full-time employment ratios are applied to the total number of tourism employed persons by industry
Key results – 2010-11

<table>
<thead>
<tr>
<th></th>
<th>2010-11</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct tourism gross domestic product (GDP)</td>
<td>$34.6 billion</td>
<td>2.5%</td>
</tr>
<tr>
<td>Direct tourism gross value added (GVA)</td>
<td>$31.5 billion</td>
<td>2.3%</td>
</tr>
<tr>
<td>Tourism net taxes on products</td>
<td>$3.1 billion</td>
<td>5.4%</td>
</tr>
<tr>
<td>Tourism exports</td>
<td>$23.7 billion</td>
<td>4.4%</td>
</tr>
<tr>
<td>Tourism consumption</td>
<td>$95.7 billion</td>
<td>2.6%</td>
</tr>
<tr>
<td>Direct tourism employment</td>
<td>513,700 persons</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

Source: ABS TSA (Cat No 5249.0)

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Key results – 2010-11 (GVA)

**GROWTH IN TOURISM VALUE ADDED, SELECTED INDUSTRIES**

- Accommodation
- Ownership of dwellings
- Cafes, restaurants and takeaway food services
- Air, water and other transport
- Travel agency and tour operator services
- Cultural services
- Sports and recreation activity
- Other retail trade
- Education
- Total

Source: ABS TSA (Cat No 5249.0)
Key results – 2010-11 (Employment)

- Tourism employed 513,700 persons
- Direct tourism employment increased by 2.7%
- Tourism share of total employment 4.5%
- 44% of total tourism employed persons were part-time
- Major tourism employment industries:
  - Cafes and Restaurants (9,500 persons, up 7.4% on 2009-10)
  - Retail Trade (3,100 persons, up 3.2% on 2009-10)
  - Accommodation (70,500 persons, down 1.3% on 2009-10)

Source: ABS TSA (Cat No 5249.0)
Australia’s TSA in the future

Further developing Australia’s TSA

- The 2011-12 edition of the TSA will contain a benchmark in respect of 2009-10 and an update for 2011-12

- Preparing for release
  i. Increased supply side data for benchmark
  ii. Published in April 2013

- To decide on TSA research agenda
  i. Additional employment data
  ii. Benchmark investigations
  iii. Possible further research into investment
  iv. Investigate Census compositional data

Questions

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