Australia’s supply-side statistics

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An overview of today’s presentation

Why supply-side statistics are necessary

Accommodation

Employment

Aviation

Conclusion
Supply-side statistics

Why are supply-side statistics necessary?

- Provides essential balance between defining demand and supply objectives
- In recent years Australia has increased its focus on developing its supply-side data collections
- Australia has a comprehensive range of supply-side collections (SNA and non-SNA)
- Australia’s Tourism 2020 relies heavily on supply-side collections for measuring progress

Australia’s accommodation statistics

Background

- ABS STA is the most comprehensive data set for accommodation supply
- Provides a range of critical supply-side indicators
- Complemented by a range of demand-side indicators
- Supported by industry through development
Australia’s accommodation statistics

Current details of STA

- Approximately 4000 establishments contacted every quarter
- Limited-scope census with 90% response rate
- Collection, processing and output takes almost 3mths
- Outputs are the finest geographic level of any ABS business collection collected on a quarterly basis

Australia’s accommodation statistics

Scope of STA

- Survey has continually evolved (1):
  - 1998 to 2004: Hotels, Motels, and Serviced Apartments with 15 or more rooms/units
  - 2000, 2003 (only): Hotels, Motels, and Serviced Apartments with 15 or more; Holiday Flats and Units 15+; Caravan Parks 40+ powered sites; Visitor Hostels 25+
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Scope of STA

• Survey has continually evolved (2):
  – 2005 – 2010: Hotels, Motels, and Serviced Apartments with 15 or more rooms/units
  – 2005 – 2010: HMSA (5-14); HMSA (15+); Holiday Flats and Units 15+; Caravan Parks 40+ powered sites; Visitor Hostels 25+
  – 2011 (only): Hotels, Motels, and Serviced Apartments with 15 or more rooms/units

Developing accommodation statistics

• ABS investigated a range of options to reduce cost: reduce geographic detail (Tourism Region) and collect via sample
• Work underway investigating HMSA (5-14); Caravan Parks 40+ powered sites; Visitor Hostels from other collection mechanisms
• Innovation required to develop IT systems to reduce costs: financial and respondent burden
Australia’s accommodation statistics

Latest results – September quarter 2011

Accommodation Takings
Australia

- Trend
- Seasonally Adjusted

Room Occupancy Rate
Australia

- Trend
- Seasonally Adjusted

Source: ABS STA (Cat No: 8635.0)

Australia’s employment statistics

Background

- Operated by Australia’s NSO, the ABS

- ABS Labour Force Survey is the most comprehensive data set for national employment

- ABS Tourism Satellite Account is the most comprehensive data set for tourism-specific employment data
Australia’s employment statistics

Current details of the Labour Force Survey

• Conceptual framework used in Australia’s Labour Force Survey aligns closely with the standards and guidelines set out in Resolutions of International Conferences of Labour Statisticians

• Multi-stage area sample covers approximately 0.33% of the civilian population of Australia aged 15 years and over

• Information is obtained using computer-assisted interviewing

Australia’s employment statistics

Scope of the Labour Force Survey

• Households selected for the Labour Force Survey are interviewed each month for eight months, with one-eighth of the sample being replaced each month

• The first interview is conducted face-to-face - subsequent interviews are conducted by telephone

• The interviews are generally conducted during the two weeks beginning on the Sunday between the 5th and 11th of each month and published 32 days after
Australia’s employment statistics

Scope of the Labour Force Survey

• The Labour Force Survey estimates are calculated in such a way as to add up to independent estimates of the civilian population aged 15 years and over (population benchmarks)

• Population benchmarks are updated bi-annually

• Every five years, the benchmarks are revised to incorporate additional information available from the ABS Census of Population and Housing (Census)

Labour Force Survey – latest results

<table>
<thead>
<tr>
<th>Key Figures</th>
<th>Dec 2011</th>
<th>Jan 2012</th>
<th>Dec 11 to Jan 12</th>
<th>Jan 11 to Jan 12</th>
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</thead>
<tbody>
<tr>
<td>Trend</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Employed persons ('000)</td>
<td>11,446.8</td>
<td>11,448.5</td>
<td>1.7</td>
<td>0.2 %</td>
</tr>
<tr>
<td>Unemployed persons ('000)</td>
<td>627.5</td>
<td>623.7</td>
<td>-3.8</td>
<td>3.3 %</td>
</tr>
<tr>
<td>Unemployment rate (%)</td>
<td>5.2</td>
<td>5.2</td>
<td>0.0 pts</td>
<td>0.1 pts</td>
</tr>
<tr>
<td>Participation rate (%)</td>
<td>65.3</td>
<td>65.3</td>
<td>-0.1 pts</td>
<td>-0.5 pts</td>
</tr>
<tr>
<td>Seasonally Adjusted</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed persons ('000)</td>
<td>11,417.5</td>
<td>11,463.9</td>
<td>46.3</td>
<td>0.3 %</td>
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<tr>
<td>Unemployed persons ('000)</td>
<td>629.5</td>
<td>614.2</td>
<td>-15.3</td>
<td>1.0 %</td>
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<tr>
<td>Unemployment rate (%)</td>
<td>5.2</td>
<td>5.1</td>
<td>-0.1 pts</td>
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<tr>
<td>Participation rate (%)</td>
<td>65.2</td>
<td>65.3</td>
<td>0.1 pts</td>
<td>-0.6 pts</td>
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</tbody>
</table>

Source: ABS LFS (Cat No: 6202.0)
Australia’s employment statistics

Tourism Satellite Account and the Labour Force Survey

- Provides tourism-specific employment data based on IRTS-2008 and TSA:RMF
- 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

Australia’s employment statistics

Issues relating to direct tourism employment estimates

- Tourism employment sometimes does not correlate well in a particular year with tourism industry GVA
- *Reason 1:* a lag between the decline (or growth) in an industry and decisions regarding employment
- *Reason 2:* there may be a shift in the number of hours worked by tourism employed persons
- *Reason 3:* Supply-Use benchmarks require updating
Australia’s employment statistics

Issues relating to direct tourism employment estimates

Source: Table 1 and 12, 5249.0 Data cube

Australia’s aviation statistics

Background

- Published by transport research agency, BITRE

- BITRE provides economic analysis, research and statistics on infrastructure, transport and regional development issues

- BITRE also collect and manage data on a range of other transport modes – maritime, rail, car
Australia’s aviation statistics

Current aviation data collections

• Domestic / international airline activity: Monthly, calendar year and financial year reports on traffic carried by domestic and international airlines within/to/from Australia

• Airline activity: Monthly, calendar year and financial year reports on traffic carried by international airlines to/from Australia

• Domestic fare indexes: covering business, full economy, restricted economy and best discount
Australia’s employment statistics

Air fares collection

• Fares are collected monthly for the top 70 routes

<table>
<thead>
<tr>
<th>Fare category</th>
<th>Airline fares collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Business</td>
<td>Qantas (Business), Virgin Australia (Business), Air Australia (Business)</td>
</tr>
<tr>
<td>2. Full Economy (fully flexible, refundable)</td>
<td>Qantas (Fully Flexible), Skywest (SkyFlexi), REX (Rex Flex), Air Australia (Flexible)</td>
</tr>
<tr>
<td>3. Restricted Economy (flexible - fees or restrictions apply)</td>
<td>Qantas (Flexi Saver), Virgin Australia (Flexi), Jetstar (Starter with Max), REX (Rex Biz), Skywest (SkySaver), Air Australia (Flexible Saver)</td>
</tr>
<tr>
<td>4. Best Discount (cheapest fare - excluding baggage surcharges)</td>
<td>Qantas (Red e-Deal or Super Saver), Virgin Australia (Saver), Jetstar (Starter), Tiger (Internet Discounted Fare), REX (Rex Saver or Rex Net), Skywest (WEBBIT, SkyDeal), Air Australia (Sale or Saver)</td>
</tr>
</tbody>
</table>

Australia’s aviation statistics

Air fares collection

• The lowest fare available for the last Thursday of the current month in each fare class is recorded

• The survey is conducted three weeks ahead of the hypothetical travel date - all fares are one-way except for the best discount fare which is a return fare

• Lowest fare is calculated for each fare class on each route. A Fisher Ideal Price Index is created with weights fixed to 2004 passenger levels
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Air fares collection

Conclusions

Reliable supply-side statistics are critical

- **Awareness** of (and changes to) standards
- **Research communities** and partnerships required to leverage existing resources and efforts to capture data
- **Solid research base** with diverse data and analysis
- **Methodology** and research required to maintain and develop
- **Balanced** decisions are at risk without a ‘suite’ of data

Source: BITRE
Questions

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