



Australian Government
Department of Resources, Energy and Tourism

ENHANCING AUSTRALIA'S ECONOMIC PROSPERITY

Australia's system of tourism statistics

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System of tourism statistics - Australia

Overview

- Snapshot of Australia's tourism industry
- Australia's tourism system of tourism statistics
- Tourism statistics organisations
- Standards and compliance
- Limitations and further issues

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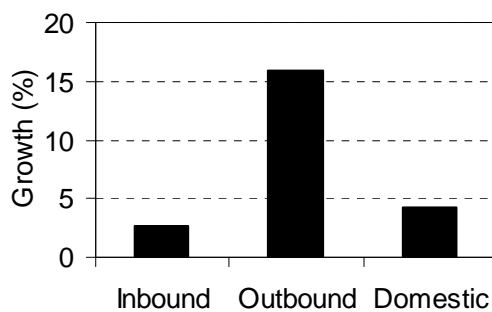
Source: ABS TSA; ABS OAD; TRA

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Snapshot of Australia's tourism industry...

In 2009-10:

- 5.7m international visitors (up 2.7%)
- 6.3m short-term departures (up 15.9%)
- 217m domestic overnight trips (down 4.3%)



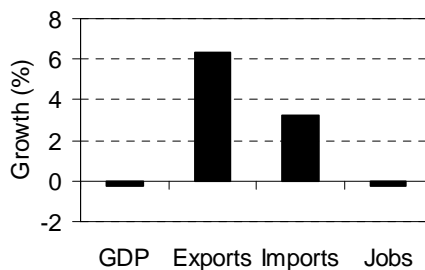
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Source: ABS TSA; ABS OAD; TRA

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Snapshot of Australia's tourism industry...

In 2008-09:

- \$33bn in GDP (2.6% of total GDP)
- \$24bn in tourism exports
- \$27bn in tourism imports
- 486,200 workers (4.5% of total jobs)



Only an integrated range of statistical collections can provide this snapshot.

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Source: ABS TSA; ABS OAD; TRA

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Snapshot of Australia's tourism industry...

Tourism is Australia's 6th largest industry and largest services export earner

Globally, Australia is ranked 8th in terms of international tourism receipts

Australia's tourism industry, both in terms of activity and spend, has experienced a range of challenges over the past decade

- Economic shocks
- Terrorism
- Health shocks
- Increased competition from other sectors of the economy
- Increased competition from other destinations

Over the past decade, outbound tourism has capitalised on a strong AUD which has eroded tourism's balance of trade to a deficit...

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Australia has a comprehensive set of tourism-specific statistics...

A range of integrated tourism collections that allow analysis of the state of Australia's tourism industry, both in terms of activity and spend.

- International tourism
- Domestic tourism
- Tourism accounts (TSA) and economic modeling

Collections critical for providing information on:

- Inbound and domestic tourism volume and value
- Tourists activities, why did they come, where they stay,
- Contribution of the industry within the economy
- Position of Australia's tourism industry in a global marketplace

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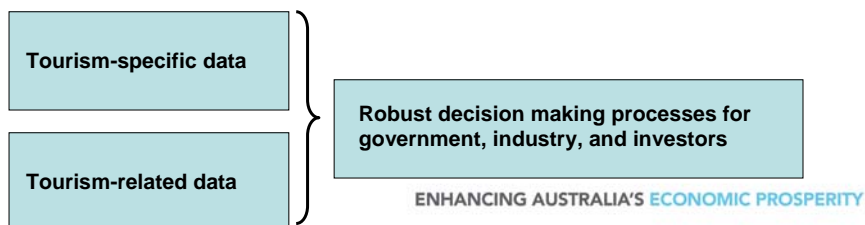
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Australia has a comprehensive set of tourism-related statistics...

A range of collections allows analysis of Australia's tourism industry relative to the other sectors of the economy...

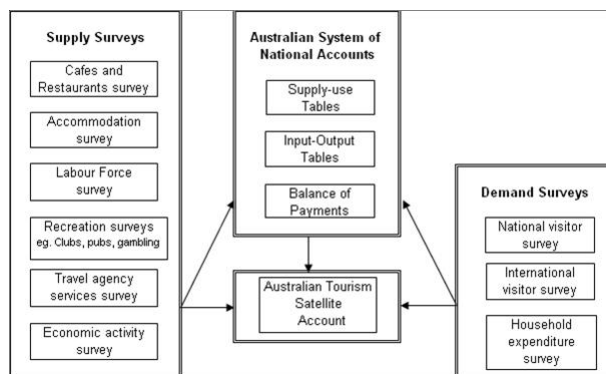
- International trade
- National Accounts
- Consumer Sentiment
- Retail Trade

Collections managed by a number of organisations (mainly government)



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Snapshot of Australia's tourism statistical network...

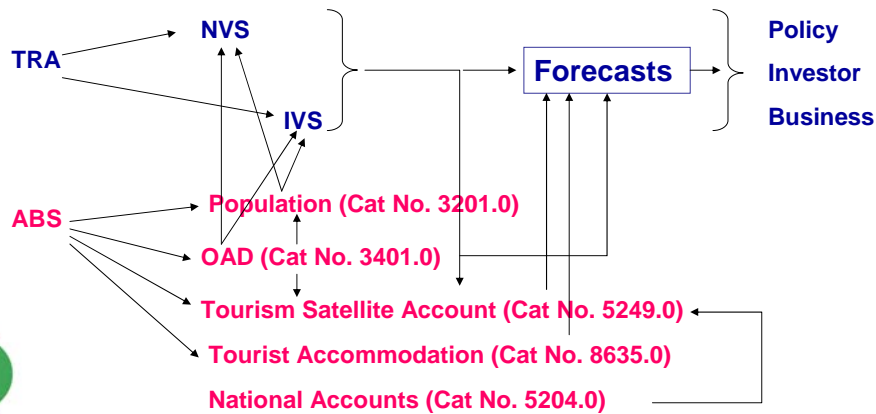


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Source: ABS TSA

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Collection integration can be significant...



And this is only for one product!

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Tourism statistics organisations - government

Tourism Research Australia

Provides superior research information that supports improved decision making, marketing and tourism industry performance for the Australian community.

- Surveys – domestic, international, and regional survey program
- Forecasts – long term industry forecasts
- Economic and industry analysis – range of economic releases measuring the structure and performance of the industry

A range of key research publications and papers are available for free download... <http://www.ret.gov.au/tourism/tra>

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Tourism statistics organisations - government

Australian Bureau of Statistics

Assists and encourages informed decision making, research and discussion within governments and the community, by leading a high quality, objective and responsive national statistical service.

- Overseas Arrivals and Departures
- Australian Tourism Satellite Account
- Survey of Tourist Accommodation
- A range of economic data collections essential for performance assessment and industry comparison

A range of key research publications and papers are available for free download... <http://www.abs.gov.au>

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Bureau of Infrastructure, Transport and Regional Economics (BITRE)

Provides economic analysis, research and statistics on infrastructure, transport and regional development issues to inform both Australian Government policy development and wider community understanding.

- Aviation
- Maritime
- Road and Rail
- Forecasts

A range of key research publications and papers are available for free download... <http://www.bitre.gov.au>

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Tourism statistics organisations – non-government

Provision of research by non-government organisations is required to ensure balanced policies, encourage investment, manage business

- Academia
- Industry associations
- Industry
- Consultants
- 'Think tanks'

Provision of data by non-government organisations encourages investors, operators, and policy makers to consider a range of options before making decisions

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Standards and compliance...

In recent years, a wide range of tourism and economic statistical standards have been reviewed and updated:

- System of National Accounts (SNA 2008)
- Balance of Payments and International Investment Position Manual (BPM6)
- International Review of Tourism Statistics (IRTS 2008)
- Australia New Zealand Standard Industrial Classification (ANZSIC 2006)

Compliance with standards ensure statistics are reliable and robust

Investors, operators, and policy makers require confidence in data

Data that is not reliable will result in wasted resources – either the data will not be used or decisions will be made based on a weak evidence base

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Changes to the IRTS and TSA:RMF...

Revised international standards for tourism statistics changed the measurement of some of the components of the Australian TSA

The fundamental change to the Australian TSA was the treatment of goods purchased by visitors:

- TSA:RMF 2008 recommends that only the retail margin contributes to direct tourism output.
- The impact of this treatment was the removal of the agriculture, mining, and manufacturing industries from tourism output and tourism GVA.

Revised standards had downside and upside:

- Downside: tourism GVA revised downwards by 11%
- Upside: the TSA was now more statistically consistent

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Changes to the IRTS and TSA:RMF...

Significant revisions in tourism GVA following the release of the ABS 2008-09 TSA...

<i>Selected industries</i>	Calculated with previous standard (\$m) (a)	Calculated with new standard (\$m)	Revision
Air and water transport	4 241	4 232	-9
Other road transport	936	715	-221
Rail transport	553	488	-65
Food manufacturing	942	—	-942
Beverage manufacturing	704	—	-704
Transport equipment manufacturing	156	—	-156
Other manufacturing	885	—	-885
All other industries	3 145	1 080	-2 065
Total Gross Value Added (all industries)	33 733	28 686	-5 047

— nil or rounded to zero (including null cells)

(a) Source: Table 4, Australian National Accounts: Tourism Satellite Account, Australia 2007-08 (cat. no. 5249.0)

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Limitations and further issues

Various issues to consider to minimise collection risks:

- Representation and bias
- Costs and public benefit
- Privacy and confidentiality
- Respondent burden
- Collection approach - sampling versus census

When the quality of the data is compromised issues such as quality arise resulting in wasted resources.

Increased use of statistics does not automatically lead to an increased understanding of statistics.

In an information-rich age, it is important for individuals to be independent, critical thinkers – statistical literacy is fundamental to achieving this.