

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



2010-11 **5249.0**

TOURISM SATELLITE ACCOUNT AUSTRALIAN
 NATIONAL
 ACCOUNTS
(ISSUES: 11, 2004 (ANNUAL TIME); WTD 21 DEC 2011)

KEY FIGURES

	2009-10	2010-11	2009-10 to 2010-11 change
Direct Tourism gross value added at basic prices (\$m)	30,802	32,456	2.5%
Net taxes on tourism products (\$m)	2,940	3,200	5.4%
Direct Tourism GGP (\$m)	33,742	35,656	2.5%
Gross value added (\$m)	1,293,048	1,298,285	0.3%
GDP (\$m)	1,293,285	1,303,108	0.3%
Tourism share of gross value added (%)	2.4	2.4	-0.2 pts
Tourism share of gross domestic product (%)	2.6	2.5	-0.2 pts



- INQUIRIES**
- For further information, please refer to the website: www.abs.gov.au, National Information and Access Service on 1300 654 634 or 1300 363 694 (toll free) or 02 959 3939.
- INDUSTRY GROSS VALUE ADDED**
- Tourism share of gross value added increased by 2.5% to \$32.5 billion.
 - Direct tourism gross value added increased by 2.5% to \$32.5 billion.
- TOURISM CONSUMPTION**
- Tourism services consumption increased by 2.5% to \$32.5 billion.
 - Tourism expenditure (domestic and overseas consumption in Australia) increased by 4.8% to \$32.5 billion.
 - Tourism services consumption by Australian residents (on- and off-territory) increased by 11.0% to \$21.5 billion.
- TOURISM EMPLOYMENT**
- Tourism share of total employment increased to 4.5%.
 - Tourism employment increased by 2.7% to 115,000 persons.

www.abs.gov.au



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Australia's TSA - background

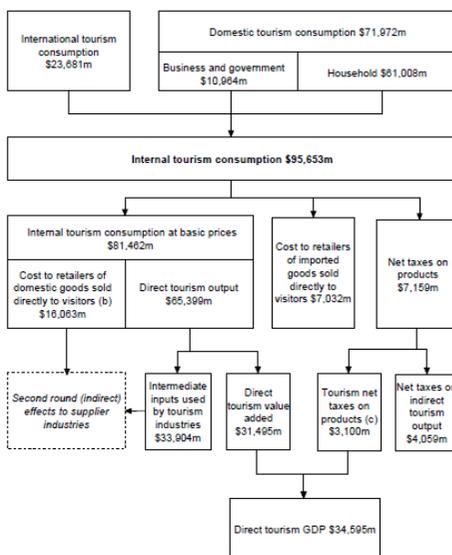
Australia's TSA is critical for measuring industry progress

- **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



Australia's TSA - background

Flow of Tourism Consumption through the Australian Economy (a)
Year ended June 2011



The information flows are critical for a range of purposes

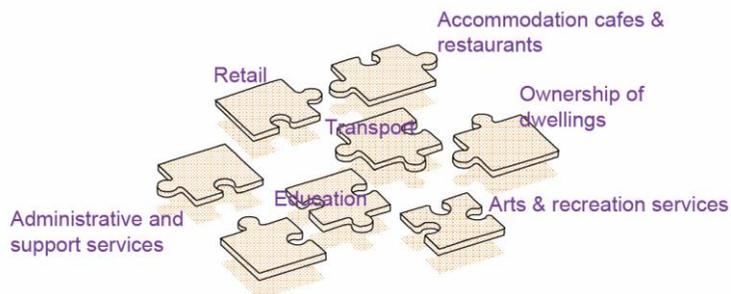
- **Benchmarking**
- **CGE modelling**
- **Research base**
- **Briefings and engagement**



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.



Australia's TSA - background

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

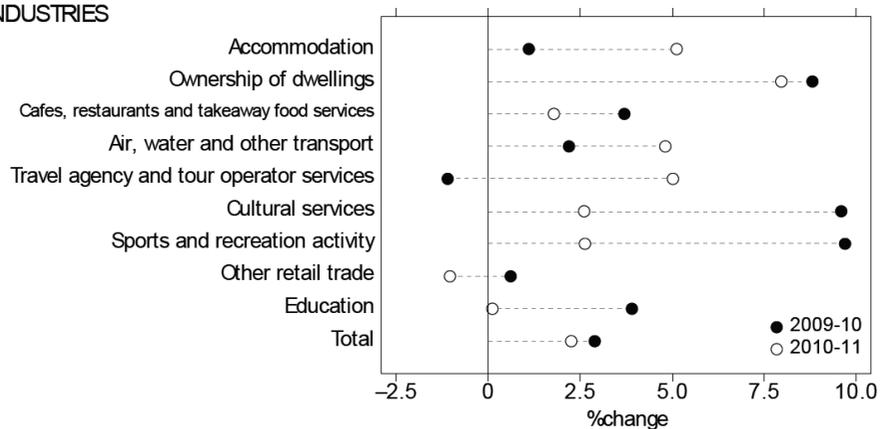
	2010-11	% Change
Direct tourism gross domestic product (GDP)	\$34.6 billion	2.5%
Direct tourism gross value added (GVA)	\$31.5 billion	2.3%
Tourism net taxes on products	\$3.1 billion	5.4%
Tourism exports	\$23.7 billion	4.4%
Tourism consumption	\$95.7 billion	2.6%
Direct tourism employment	513,700 persons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

Source: ABS TSA (Cat No 5249.0)



Key results – 2010-11 (GVA)

GROWTH IN TOURISM VALUE ADDED, SELECTED INDUSTRIES



Source: ABS TSA (Cat No 5249.0)

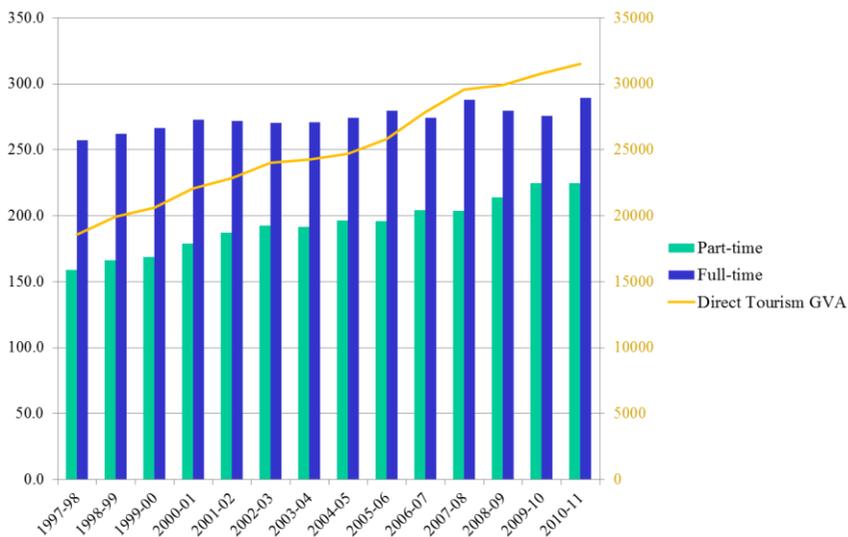


Key results – 2010-11 (Employment)

- 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)



Key results – 2010-11 (Employment)



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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