

Australia's supply-side statistics

Tim Quinn
Manager
Economic and Industry Analysis
Tourism Research Australia
Department of Resources, Energy and Tourism



Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia



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An overview of today's presentation

Why supply-side statistics are necessary

Accommodation

Employment

Aviation

Conclusion



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Supply-side statistics

Why are supply-side statistics necessary?

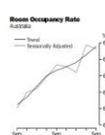
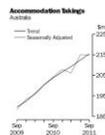
- Provides essential balance between defining demand and supply objectives
- In recent years Australia has increased its focus on developing its supply-side data collections
- Australia has a comprehensive range of supply-side collections (SNA and non-SNA)
- Australia's *Tourism 2020* relies heavily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



INQUIRIES

For further information about these and related statistics, contact the National Information and Referral Service on 1300 130 070.

SEPTEMBER QUARTER 2011 **8635.0**

TOURIST ACCOMMODATION, AUSTRALIA

EMBARGO: 11.30AM (CANBERRA TIME) FRI 6 JAN 2012

KEY FIGURES

ACCOMMODATION WITH 15 ROOMS OR MORE	2010		2011	
	Avn Qtr	Sep Qtr	Avn Qtr	Sep Qtr
	21	31	22	29
	21	31	22	29

Trend				
Takings from accommodation (\$m)	2 124.4	2 154.8	1.4 %	5.7 %
Room occupancy rate (%)	65.3	65.8	0.5 pts	1.5 pts

Seasonally Adjusted				
Takings from accommodation (\$m)	2 151.0	2 148.2	-0.1 %	5.1 %
Room occupancy rate (%)	65.9	65.6	-0.3 pts	0.9 pts

KEY POINTS

ACCOMMODATION TAKINGS

- In the September quarter 2011, the second estimate of total accommodation takings for hotels, motels and serviced apartments with 15 or more rooms increased by 1.4% to \$215.8 million, compared with the June quarter 2011.
- Over the same period, the seasonally adjusted estimate decreased by 0.1% to \$214.2 million.

ROOM OCCUPANCY RATE

- The September quarter 2011 final estimate room occupancy rate of 65.8% for hotels, motels and serviced apartments with 15 or more rooms was 0.5 percentage points higher than the previous quarter.
- Over the same period, the seasonally adjusted estimate decreased by 0.3 percentage points to 65.6%.



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+



Australia's accommodation statistics

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



Australia's accommodation statistics

Developing accommodation statistics

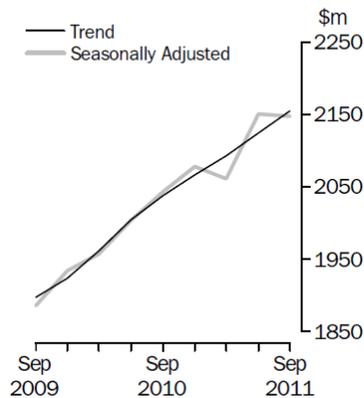
- ABS investigated a range of options to reduce cost: reduce geographic detail (Tourism Region) and collect via sample
- Work underway investigating HMSA (5-14); Caravan Parks 40+ powered sites; Visitor Hostels from other collection mechanisms
- Innovation required to develop IT systems to reduce costs: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



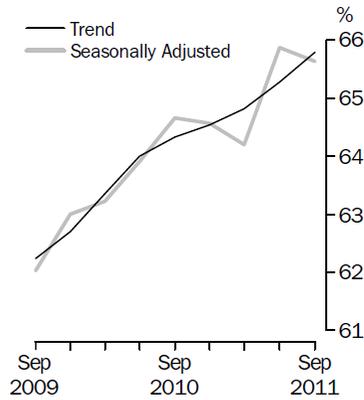
Australia's accommodation statistics

Latest results – September quarter 2011

Accommodation Takings Australia



Room Occupancy Rate Australia



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



JANUARY 2012

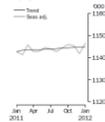
6202.0

LABOUR FORCE

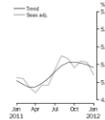
AUSTRALIA

EMBARGO: 11.30AM (CANBERRA TIME) THURS 16 FEB 2012

Employed Persons



Unemployment Rate



INQUIRIES

For further information about trends and related statistics, contact the National Information and Referral Service on 1300 236 010, email client_services@abs.gov.au or Labour Force enquiries (02) 6252 6025, email labourforce@abs.gov.au.

KEY FIGURES

	Dec 2011	Jan 2012	Dec 11 to Jan 12	Jan 12 to Jan 12
Trend				
Employed persons ('000)	11 446.8	11 448.5	1.7	0.2 %
Unemployed persons ('000)	627.5	623.7	-3.8	3.3 %
Unemployment rate (%)	5.2	5.2	0.0 pts	0.1 pts
Participation rate (%)	65.3	65.3	-0.1 pts	-0.5 pts
Seasonally Adjusted				
Employed persons ('000)	11 417.5	11 463.9	46.3	0.3 %
Unemployed persons ('000)	629.5	654.2	+24.7	1.0 %
Unemployment rate (%)	5.2	5.1	-0.1 pts	0.0 pts
Participation rate (%)	65.2	65.3	0.1 pts	-0.6 pts

KEY POINTS

TREND ESTIMATES (MONTHLY CHANGE)

- Employment increased to 11,448,500.
- Unemployment decreased to 623,700.
- Unemployment rate steady at 5.2%.
- Participation rate at 65.3%.
- Aggregate monthly hours worked decreased to 1,607.0 million hours.

SEASONALLY ADJUSTED ESTIMATES (MONTHLY CHANGE)

- Employment increased to 11,463,900. Full-time employment increased 12,300 persons to 9,650,800 and part-time employment increased 34,000 persons to 3,400,800.
- Unemployment decreased 15,300 (2.4%) to 614,200. The number of persons looking for part-time work decreased 3,000 to 175,200 and the number of persons looking for full-time work decreased 12,300 to 430,000.
- The unemployment rate decreased 0.1 pts to 5.1%. The male unemployment rate decreased 0.1 pts to 4.9% and the female unemployment rate decreased 0.2 pts to 5.3%.
- The participation rate increased 0.1 pts to 65.3%.
- Aggregate monthly hours worked decreased 28.1 million hours to 1,595.9 million hours.



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)



Australia's employment statistics

Labour Force Survey – latest results

KEY FIGURES

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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

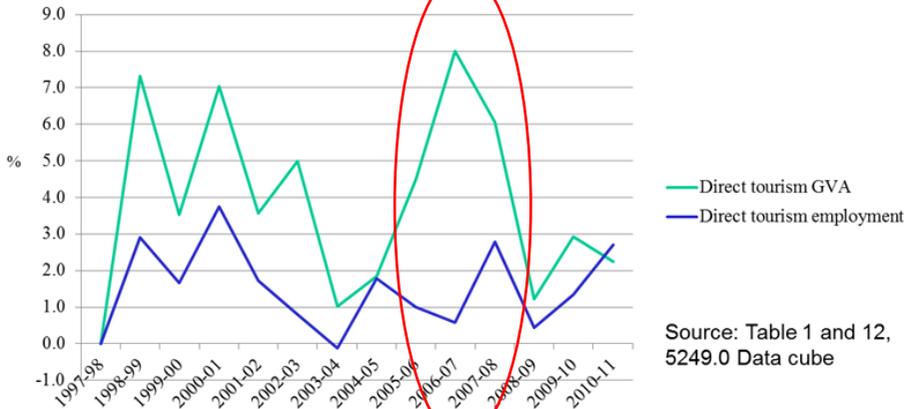
Issues relating to direct tourism employment estimates

- 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 aviation statistics

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Australia's employment statistics

Air fares collection

- Fares are collected monthly for the top 70 routes

Category and Airline of fares collected per route	
Fare category	Airline fares collected
1. Business	Qantas (Business), Virgin Australia (Business), Air Australia (Business)
2. Full Economy (fully flexible, refundable)	Qantas (Fully Flexible), Skywest (SkyFlexi), REX (Rex Flex), Air Australia (Flexible)
3. Restricted Economy (flexible - fees or restrictions apply)	Qantas (Flexi Saver), Virgin Australia (Flexi) (Starter with Max), REX (Rex Biz), Skywest (SkySaver), Air Australia (Flexible Saver)
4. Best Discount (cheapest fare - excluding baggage surcharges)	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)



Australia's aviation statistics

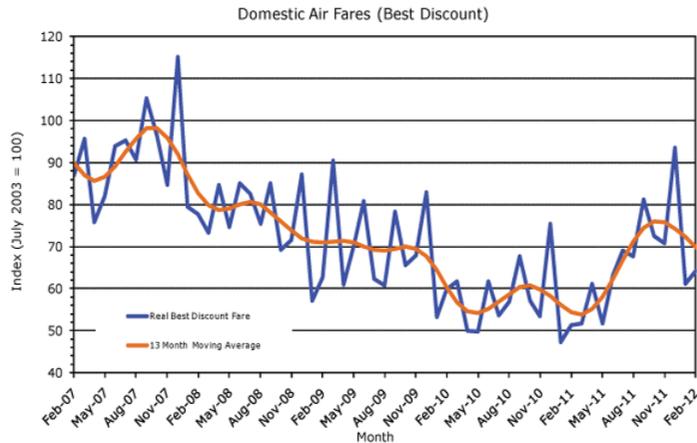
Air fares collection

- 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



Australia's aviation statistics

Air fares collection



Source: BITRE



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



Questions

Tourism Research Australia:

www.ret.gov.au/tra

Tim Quinn

Manager

Economic and Industry Analysis

Tourism Research Australia

Ph (02) 6213 6745

Email: tim.quinn@ret.gov.au

