

Statistics Weekly

Thursday, 22 February 1990

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MONTHLY CHANGE IN RETAIL TURNOVER
Trend series



Retail activity continues to weaken

Seasonally adjusted Australian retail turnover fell 0.2 per cent in December to \$6,925 million.

As a result, trend estimates continue to indicate weak growth averaging 0.3 per cent per month over the three months to December. This compares with an average of 0.6 per cent per month for the three months ended September.

Since the strong growth experienced in late 1988 and early 1989, growth has continued to ease. Annual growth in the trend estimates (December month 1989 over December month 1988) shows a moderate 8.3 per cent. Broken down further, growth over the first half of 1989 was 5.3 per cent and over the second half of the year a weak 2.9 per cent.

Since each of these estimates is based on current prices, growth in 'real' terms (i.e. after allowing for price movements) will in most cases be lower. For example, December quarter estimates adjusted for price movements showed quarterly growth of just 0.2 per cent, compared with growth at current prices of 1.1 per cent.

The industry picture shows the continued influence of a declining clothing and fabrics stores industry along with weak growth in the second largest industry, hotels, liquor stores and licensed clubs. The other two largest industries, grocers etc. and department/general stores, are each showing moderate growth rates.

The State-by-State perspective is influenced by easing growth rates in NSW and Queensland. Following a period of low growth, Victoria's trend indicates somewhat stronger growth over recent months. Other States and Territories are currently experiencing weak to moderate growth.

RETAIL TURNOVER

	Original value in December 1989 \$ million	Percentage change in trend estimates	
		Average monthly increase for 3 months to December 1989	December 1989 over December 1988
Grocers, etc.	2,249	0.5	8.8
Department/general stores	1,544	0.5	5.9
Hotels, liquor stores, licensed clubs	1,193	0.3	11.5
Clothing and fabrics stores	727	-0.7	-7.0
Other retailers	3,652	— not available —	
All retailers	9,365	0.3	8.3

The publication, *Retail Trade, Australia* provides reliable estimates of monthly changes in turnover based on data collected from over 6,500 enterprises (covering more than 19,000 outlets) across Australia. The survey includes selected service establishments such as restaurants and hotels but excludes motor vehicle dealers, service stations, etc. All large retailers are included and these account for approximately half of the monthly estimate. The remainder is drawn from a sample of smaller retailers.

Queensland demographics updated

Queensland's population has enjoyed a strong positive annual growth rate of at least 1.5 per cent since 1947.

In the year to June 1989 the growth rate is estimated at 3.2 per cent, following growth of 2.5 and 2.0 per cent in the previous two years.

Net migration to Queensland over the last ten years has been dominated by interstate, rather than overseas, migration, with the majority of migrants coming from NSW and Victoria.

This information is provided in the latest annual *Demographic Summary, Queensland*, released this week by the Queensland office of the ABS.

The 40-page publication is a compendium of up-to-date demographic trends in the State, accompanied by extensive analytical comment. Most of the data and analysis apply to the calendar year 1988.

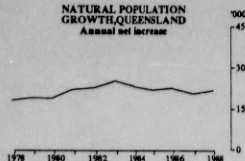
Comparable data for other States and Territories are available in similar ABS publications.

The Demographic Summary is a valuable reference source for libraries, schools and social planners, and for businesses with a market or an intention to establish a market in Queensland.

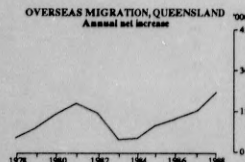
Information in the publication which could have implications for business planning includes:

- ☐ The average age of Queenslanders has risen from 26.9 years in 1971 to 31.0 years in 1988. (This compares with a national average of 31.6 for 1988.)
- ☐ Decreasing mortality rates in recent years have resulted in an increase in life expectancy. Over the last 10 years, life expectancy at birth has increased by 3.4 years to 73.3 years for boys and by 2.7 years to 79.8 years for girls. The corresponding national situation records an increase of 2.8 years to 73.1 for boys, and an increase of 2.3 years to 79.5 for girls.
- ☐ The number of births per 1,000 women in the 20 to 24 years age group dropped from 127.0 in 1978 to 90.3 in 1988. By contrast, for women in the 30 to 34 years age group, the numbers have increased from 69.3 to 86.3 over the same period. These trends are similar to those for the country as a whole.
- ☐ Young Queensland adults are postponing marriage. The median age for bridegrooms marrying for the first time increased from 23.6 years in 1978 to 25.7 years in 1988 (national median, 26.1 years). During the same period the median age for brides marrying for the first time increased from 21.1 years to 23.6 years (national median, 24.0 years).

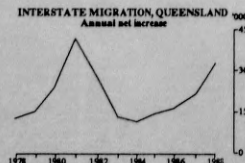
NATURAL POPULATION GROWTH/QUEENSLAND
Annual net increase



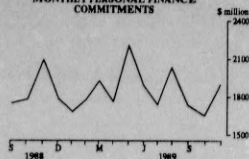
OVERSEAS MIGRATION, QUEENSLAND
Annual net increase



INTERSTATE MIGRATION, QUEENSLAND
Annual net increase



MONTHLY PERSONAL FINANCE COMMITMENTS



Personal finance still leads housing loans

New lending for personal finance on items such as cars, holidays and credit card purchases continued to exceed lending for housing in November 1989.

Commitments for personal finance totalled \$1,897.8 million in November, \$278.1 million (17.2%) more than commitments for housing finance in the same month.

Fixed loan commitments, the major component of personal finance at \$1,215.0 million in November 1989, were up 14.9 per cent on October. Commitments under revolving credit facilities (i.e. credit card facilities, personal overdrafts and personal lines of credit) were \$682.8 million, up 14.8 per cent.

Commitments for cars and station wagons, at \$500.2 million, comprised 41.2 per cent of the total borrowings under fixed loan facilities. Of that amount, \$148.6 million was committed for 9,564 new cars and station wagons, and \$351.6 million for 43,329 used vehicles.

NEW PERSONAL FINANCE COMMITMENTS, NOVEMBER 1989
\$ million

	Banks	Finance companies	Credit cooperatives	Other lenders	All lenders
Fixed loan	680.1	324.0	183.7	27.3	1,215.0
Revolving credit	575.1	88.1	11.3	8.3	682.8
Total commitments	1,255.2	412.1	194.9	35.6	1,897.8

For further information, order the publication *Personal Finance, Australia* (5642.0), or contact John Carson on (062) 52 7110.

Tourist accommodation industry after the bicentenary

Takings from accommodation in hotels, motels and guest houses were marginally higher in the September quarter 1989 than in the same quarter of 1988.

The increase of \$2.8 million, or 0.5 per cent, in takings was achieved despite lower numbers of guest arrivals and room nights sold.

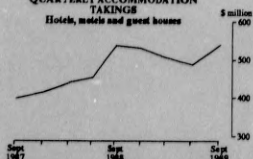
Tourist accommodation statistics for the September quarter 1989 showed that for hotels, motels and guest houses:

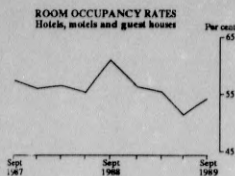
- ☐ the number of room nights sold was 411,000 less (i.e. 5.5%) than in the same quarter of 1988;
- ☐ the number of guest arrivals was down 285,000 (4.2%) on September quarter 1988.

When compared with the June quarter 1989, the September quarter figures showed substantial rises in takings (10.3%), room nights sold (7.4%), and guest arrivals (11.0%).

QUARTERLY ACCOMMODATION TAKINGS

Hotels, motels and guest houses





Among the States and Territories, only Tasmania recorded a decrease in takings — down \$3.8 million or 30.2 per cent on the June quarter.

Despite the increase in takings over the two years to September 1989, the gap between room nights sold and room nights available has increased during the period.

As a result of steadily increasing capacity, the gap has widened from 4.9 million room nights in September quarter 1987 to 6.0 million room nights in September quarter 1989. One measure of the gap, the room occupancy rate, is shown in the chart provided.

HOTELS, MOTELS AND GUEST HOUSES WITH FACILITIES

	June qtr 1988	Sept. qtr 1988	June qtr 1989	Sept. qtr 1989
Number of guest rooms available	131,510	134,241	142,662	142,608
Room nights ('000)	6,553	7,496	6,598	7,085
Room occupancy rate (%)	55.3	61.0	51.4	54.2
Takings from accom- modation (\$m)	453	537	487	540

For further information, order the publication *Tourist Accommodation, Australia* (8635.0), or contact George Webb on (062) 52 5452.

The national accounts explained

The ABS has produced a highly readable guide to one of the most important sets of statistics produced by the Bureau — the Australian national accounts.

The 21-page booklet outlines the main features of the national accounts, in a way which gives readers a basic understanding of the meaning and uses of this vital series of statistics.

The booklet will be particularly useful for people who want a simple explanation of the national accounts without being burdened by too much economic jargon.

The guide, for example, provides a simple description of the term GDP:

The summary measure of the nation's economic position provided in the national accounts is *gross domestic product*, or *GDP*. GDP is defined as the income generated by production taking place within Australia's domestic territory. The term *gross* in GDP indicates that no deduction has been made for the consumption of fixed capital (also known as depreciation); in other words, the gradual using up of capital equipment through wear and tear is not accounted for when measuring GDP. If allowance for the consumption of fixed capital is deducted from GDP, the resulting measure is *net domestic product*.

A Guide to the Australian National Accounts (5235.0) is now available at a recommended retail price of \$5.00.

Inquiries

The ABS supplies a wide range of statistical information:

- ☐ through its bookshops
- ☐ by mail order (including subscription)
- ☐ by facsimile
- ☐ electronically.

To order any of the publications that appear in *Statistics Weekly* or to inquire about the statistics and services available from the ABS, contact Information Services at any of the offices listed below. An Information Consultancy Service in each office provides assistance of a more extensive or complex nature.

ABS Central Office

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WA (09) 323 5140
SA (08) 237 7100
Tas. (002) 20 5800
NT (089) 81 3456

Any suggestions for improvement to this publication should be addressed to:

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Statistics Weekly
(062) 52 6917

Statistics Weekly
22 February 1990

All the week's releases: 14 to 20 February

General

Monthly Summary of Statistics, Aust., February 1990 (1304.0; \$17.50)
Statistics Weekly, 15 February 1990 (1318.0; \$3.50)
Economic Indicators, Qld, February 1990 (1307.3; \$5.00)
Economic Indicators, WA, February 1990 (1307.5; \$5.00)
Northern Territory Statistical Summary, 1990 (1306.7; \$17.50)
Australian Capital Territory at a Glance, 1990 (1314.8; free)

Census of Population and Housing

Census 86 — Perth... A Social Atlas — Part 5: Workplace Topics, June 1986 (2505.5; \$6.00) — *new issue*
Census 86 — Canberra ... A Social Atlas, June 1986 (2501.8; \$25.00) — *new issue*

Demography

Births, Vic., 1988 (3305.2; \$7.00)
Demographic Summary, Qld, 1988 (3308.3; \$12.00)

National accounts, finance and foreign trade

A Guide to the Australian National Accounts, 1990 (5235.0; \$5.00) — *new issue*
Exports and Imports, Aust.: Trade with Selected Countries and Major Country Groups, September Qtr 1989 (5422.0; \$16.25)
Personal Finance, Aust., November 1989 (5642.0; \$5.00)
Government Finance Statistics, Tas., 1987-88 (5501.6; \$11.50)

Labour statistics and prices

The Labour Force, Aust., January 1990 (6203.0; \$13.00)
Award Rates of Pay Indexes, Aust., December 1989 (6312.0; \$8.50)
Labour Force, SA, November Qtr 1989 (6201.4; \$13.00)

Secondary industry and distribution

Production of Household Appliances and Electrical Equipment, Aust., November 1989 (8357.0; \$5.50)
Production of Fibres, Yarns, Fabrics, Bedding and Floor Coverings, Aust., November 1989 (8360.0; \$8.50)
Production of Metal Products, Aust., November 1989 (8367.0; \$4.50)
Production of Energy Products, Aust., November 1989 (8368.0; \$3.50)
Retail Trade, Aust., December 1989 (8501.0; \$8.50)
Tourist Accommodation, Aust., September Qtr 1989 (8635.0; \$9.00)
Building Activity, Aust., September Qtr 1989 Corrigendum (8752.0; free)
Production Statistics, NSW, November 1989 (8304.1; \$5.00)
Building Approvals, Qld, December 1989 (8731.3; \$8.50)
Building Activity, Qld, September Qtr 1989 (8752.3; \$8.00)
Dwelling Unit Commencements Reported by Approving Authorities, SA, November 1989, Preliminary (8740.4; \$3.30)
Building Approvals, Tas., December 1989 (8731.6; \$8.50)

Transport

Road Traffic Accidents Involving Fatalities, Aust., January 1990 (9401.0; \$4.00)

Calendar of key releases

Expected releases over the fortnight to 6 March 1990

February

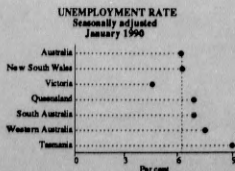
- 22** Housing Finance for Owner Occupation, Aust., December 1989 (5609.0; \$8.00)
- 26** Production Statistics, Aust., January 1990, Preliminary (8301.0; \$5.00)
- 27** Price Index of Materials Used in Building Other Than House Building, Eight Capital Cities, December 1989 (6407.0; \$9.00)
- *** Export Price Index, Aust., December 1989 (6405.0; \$5.00)
Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, December 1989 (6408.0; \$3.75)
Price Indexes of Materials Used in Manufacturing Industries, Aust., December 1989 (6411.0; \$8.50)
Price Indexes of Articles Produced By Manufacturing Industry, Aust., December 1989 (6412.0; \$6.00)

March

- 1** Balance of Payments, Aust., January 1990 (5301.0; \$12.00)
Foreign Investment, Aust., December Quarter 1989, Preliminary (5307.0; \$6.50)
Average Weekly Earnings, Aust., November 1989, Preliminary (6301.0; \$3.50)
 - 5** Building Approvals, Aust., January 1990 (8731.0; \$8.50)
 - 6** Private New Capital Expenditure, Aust., Actual and Expected Expenditure to June 1991, December Quarter 1989 Survey, Preliminary (5625.0; \$3.50)
- * Expected to be released during the week ending Friday, 2 March.

The latest ...

Changes to key State indicators — consolidated to
20 February 1990



Statistics Weekly
22 February 1990

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
— Percentage change from same period previous year —									
New capital expenditure (Sept. qtr 89)*	15.9	24.8	15.2	0.0	45.4	-26.7	n.a.	n.a.	21.1
Retail turnover (Dec. 89) (trend estimate)	9.7	6.6	10.5	4.2	10.3	6.9	n.a.	5.1	8.3
New motor vehicle registrations (Dec. 89)*	-9.6	13.3	-2.6	3.8	-8.2	n.a.	-8.4	11.4	-1.0
Number of dwelling unit approvals (Dec. 89)	-35.6	-31.7	-31.9	-1.4	-36.4	-32.4	109.7	-28.9	-31.2
Value of total building work done (Sept. qtr)	20.5	25.8	28.1	30.9	36.5	18.2	1.8	6.4	24.8
Employed persons (Jan. 90)*	2.8	5.2	5.5	3.1	1.2	7.7	0.0	5.5	3.9
Capital city consumer price index (Dec. qtr 89)	7.4	8.5	7.7	7.5	7.8	7.1	7.5	6.5	7.8
Average weekly earnings (full-time adult ordinary time) (August 89)	10.6	6.9	5.8	7.6	5.8	6.7	4.5	7.5	8.0
Population (June 89)	1.1	1.3	3.2	1.1	3.0	0.6	0.2	1.6	1.6
Guest nights in licensed hotels and motels, etc (Sept. qtr 89)	-8.5	19.0	-24.5	13.8	4.5	-6.6	2.1	-6.7	-7.9

* Seasonally adjusted for States (but not Territories)

Key national indicators – consolidated to 20 February 1990

				Latest figure available		Percentage change (a) on	
				Original	Seasonally adjusted	Previous period	Corresponding period last year
				Period			
National production							
Gross domestic product	— current prices	\$m	Sept. qtr 89	89,803	89,733	1.8	13.0
	— 1984-85 prices	"	"	63,334	63,732	0.7	5.4
Industrial activity							
New capital expenditure	— current prices	\$m	Sept. qtr 89	7,152	7,413	0.0	20.2
	— 1984-85 prices	"	"	5,544	5,755	-1.8	18.3
Expected new capital expenditure		"	Three months to Dec. 89	8,493	n.a.	n.a.	11.3
Retail turnover	— current prices	"	Dec. 89	9,365	6,925	-0.2	9.4
	— 1984-85 prices	"	Dec. qtr 89	16,697	14,831	0.2	3.7
New motor vehicle registrations		No.	Dec. 89	47,168	49,351	-3.7	-1.0
Dwelling unit approvals		"	Dec. 89	9,597	11,041	-7.7	-27.7
Value of all building approvals		\$m	"	1,622	1,810	-16.2	-25.5
Value of total building work done	— current prices	"	Sept. qtr 89	7,973	7,583	-1.8	24.7
	— 1984-85 prices	"	"	5,237	4,999	-3.9	11.2
Manufacturers' sales		"	Sept. qtr 89	36,369	35,389	1.5	14.0
Expected manufacturers' sales		"	Three months to Dec. 89	37,447	n.a.	n.a.	9.6
Labour							
Employed persons		'000	Jan. 90	7,712.6	7,870.9	0.3	3.9
Unemployment rate †		%	"	6.7	6.2	0.2	-0.7
Participation rate †		"	"	62.8	63.8	0.3	0.8
Job vacancies		'000	Nov. 89	62.7	66.0	-0.6	-6.0
Average weekly overtime per employee		hours	"	1.6	1.5	-3.0	7.7
Prices, profits and wages							
Consumer price index	1980-81 = 100.0		Dec. qtr 89	200.7	n.a.	1.9	7.8
Price index of materials used in manufacturing industry	1984-85 = 100.0		Nov. 89	118.0	n.a.	0.2	8.2
Price index of articles produced by manufacturing industry	1968-69 = 100.0		"	566.6	n.a.	0.6	7.0
Company profits before income tax		\$m	Sept. qtr 89	4,846	4,667	-3.6	14.1
Average weekly earnings (Full-time adults; ordinary time)		\$	August 89	508.40	n.a.	1.5	8.0
Interest rates (b) (monthly average)							
90-day bank bills †	% per annum		Dec. 89	17.80	n.a.	-0.4	2.6
10-year Treasury bonds †			"	12.90	n.a.	-0.2	-0.1
Balance of payments							
Exports of merchandise		\$m	Dec. 89	4,155	4,012	-0.9	15.4
Imports of merchandise		"	"	3,653	4,010	-8.1	1.0
Balance on merchandise trade (c)		"	"	502	2	n.a.	n.a.
Balance of goods and services (c)		"	"	159	-462	39.0	32.7
Balance on current account (c)		"	"	-908	-1,622	9.5	2.0
Terms of trade (d)	1984-85 = 100.0		Sept. qtr 89	n.a.	108.2	-2.8	3.0
Foreign investment							
Net foreign debt		\$m	30 Sept. 89	110,329	n.a.	1.9	14.7
Net foreign liabilities		"	"	147,716	n.a.	3.5	15.1
Exchange rates (monthly average)							
\$US	per \$A		Dec. 89	0.7859	n.a.	0.4	-8.5
Trade weighted index	May 1970 = 100.0		"	60.7	n.a.	-0.2	-3.5
Other indicators							
Population (resident at end of qtr)		million	June 89	16.8	n.a.	0.4	1.6
Overseas visitors		'000	Nov. 89	193	170	3.2	-5.1

(a) Based on seasonally adjusted figures where available. (b) Source: Reserve Bank of Australia. (c) For percentage changes, a minus sign indicates an increase in the deficit; no sign means a decrease in the deficit or an increase in the surplus. (d) The ratio of the price of goods and services for exports to that for imports.

NOTES: † = change is shown in terms of percentage points. n.a. = not available.

Figures have been taken from a variety of ABS publications. Copies may be obtained from Information Services (see page 6).

Some of the figures shown are preliminary, some final, and some are revisions of previously published figures. Users should check the latest relevant publication or with the ABS Information Services if the status of the statistic is important.

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