

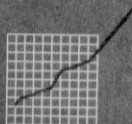
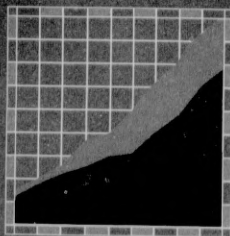
Statistics Weekly

Thursday, 30 November 1989

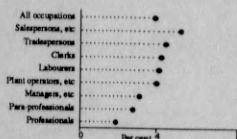
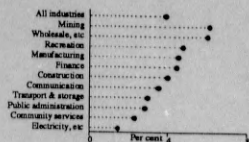
The week in statistics ...

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IAN CASTLES
Australian Statistician



WEEKLY AWARD RATES OF PAY INDEXES
Full-time adults
Annual change to September 1989



Award pay increases

Over the 12 months to September 1989 the weekly award rates of pay indexes rose by 3.9 per cent for full-time adult persons.

The largest movements over the period occurred in the Mining and Wholesale and retail trade industries (6.1% and 6.0% respectively). The smallest movements occurred in the Electricity, gas and water and Community services industries (1.6% and 2.5% respectively).

In terms of occupation groups, the largest movement was for Sales and personal service workers (5.1%). The smallest movements occurred in the Professional occupation groups (2.0%).

The increases in award rates of pay over the twelve months to September 1989 are mostly due to the continuing inclusion of the March 1987 second tier increase and the August 1988 National Wage Case. A small percentage of employees have also received the August 1989 National Wage Case, effective in September 1989.

WEEKLY AWARD RATES OF PAY
Annual percentage change for full-time adult employees

	Males	Females	Persons
September 1988	6.5	6.7	6.6
September 1989	3.8	4.1	3.9

For further information, order the publication *Award Rates of Pay Indexes, Australia* (6312.0) or contact Janet Gunn on (062) 52 6581

October balance of payments

Australia's current account deficit rose sharply in original terms in October, but fell by 14 per cent after adjustment for seasonal influences.

The seasonally adjusted deficit fell by \$275 million to \$1,657 million, with a decrease in merchandise imports (down \$301 million or 6 per cent) mainly responsible. Exports remained virtually unchanged.

In original terms, exports were also virtually unchanged at \$3,989 million. However imports rose by nearly 10 per cent to \$4,740 million, the largest increases being in machinery and fuels.

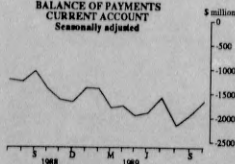
The resulting increase in the merchandise trade deficit was the main cause of the October current account deficit of \$2,242 million, up \$549 million or 32 per cent on the September deficit.

An increase of 16 per cent in the net income deficit, due to a seasonal increase in official investment income payable, also contributed to the larger current account deficit.

A reduction in the deficit on net services and an increased surplus on net unrequited transfers only partly offset the increases in the deficit on merchandise trade and net income.

Continued ...

BALANCE OF PAYMENTS
CURRENT ACCOUNT
Seasonally adjusted



BALANCE OF PAYMENTS, CURRENT ACCOUNT
\$ million

	September 1989		October 1989	
	Original	Seasonally adjusted	Original	Seasonally adjusted
Balance on current account	-1,693	-1,932	-2,242	-1,657
Balance on merchandise trade	-315	-537	-751	-248
Net services	-466	-307	-420	-350
Net income	-1,100	-1,280	-1,275	-1,237
Net unrequited transfers	188	192	204	178

Official sector capital transactions recorded a net inflow of \$608 million, up \$365 million on the inflow in September. The increased inflow was mainly accounted for by higher net borrowing abroad by State government (up \$235 million to \$306 million) and by smaller outflow on Reserve Bank transactions (down \$105 million).

For further information, order the publication *Balance of Payments, Australia* (5301.0) or contact either Dennis Hensman on (062) 52 6689 or Peter Bradbury on (062) 52 5540

Manufacturing inputs cheaper

The price index of materials used in manufacturing industry fell for the second month running in September. The fall of 1.3 per cent was the largest drop in the index since October 1988.

The annual rate of increase in September dropped to 4.3 per cent, sharply down on the 6.3 per cent recorded in August.

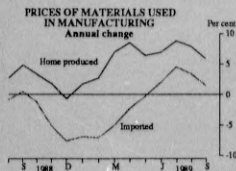
The fall in September was mainly due to lower prices for a number of basic materials.

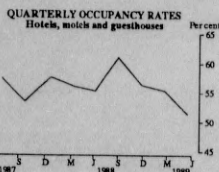
The main price decrease was for sheep and lambs, where seasonal factors and problems in the export trade with the Middle East resulted in increased domestic supply and lower prices. Prices of cattle and calves also recorded significant falls.

The table below shows the impact of these and other price movements on the price indexes for imported and home produced materials.

PRICES OF MATERIALS USED IN MANUFACTURING, SEPTEMBER 1989
Percentage change

Source of material	From previous month	From corresponding month of previous year
Imported	-1.2	1.5
Home produced	-1.3	5.9
Total	-1.3	4.3





Tourist accommodation industry downturn

Takings from accommodation in hotels, motels and guest houses fell 3.9 per cent between the March and June quarters 1989.

However June quarter takings were up \$44 million, or about 9 per cent on takings in the same quarter of the bicentenary year.

For hotels, motels and guest houses:

- ☐ the number of room nights sold in the June quarter 1989 was 290,000 (4.2 per cent) less than for the March quarter 1989, but slightly (0.7 per cent) more than that sold in the June quarter 1988.
- ☐ the number of guest rooms available has continued to increase, with a growth of 11,152 rooms (8.5 per cent) between the June quarter 1988 and June quarter 1989.
- ☐ this increase in capacity without a corresponding growth in room nights has resulted in a drop in occupancy rates from 55.4 per cent in the June quarter 1988 to 51.4 per cent for the June quarter 1989.

HOTELS, MOTELS AND GUEST HOUSES WITH FACILITIES

	March qtr 1988	June qtr 1988	March qtr 1989	June qtr 1989
Number of guest rooms available	129,624	131,510	139,315	142,662
Room nights ('000)	6,599	6,553	6,888	6,598
Room occupancy rate (%)	56.5	55.3	55.4	51.4
Takings from accommodation (\$m)	440	453	506	487

Takings from short term caravan parks fell 38.6 per cent between the March and June quarters 1989, and takings from holiday flats and units fell 34.2 per cent.

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

Manufacturing: the Score-card for October

Up 8

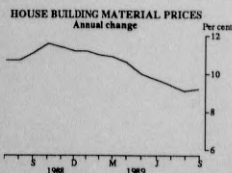
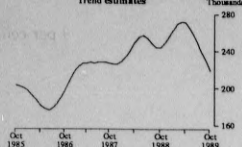
Down 16

Sixteen of the 24 seasonally adjusted categories covered by the monthly survey of manufacturing production recorded falls in October.

The major falls in the month occurred in the production of rotary petrol lawn mowers (23.9 per cent), electric motors (17.5 per cent) and wool woven fabric (15.6 per cent).

The table sets out production figures for the manufacturing commodities recording the largest percentage increases and decreases in output in the month of October.

PRODUCTION OF ELECTRIC MOTORS



PRODUCTION OF COMMODITIES RECORDING SIGNIFICANT MONTHLY CHANGE Seasonally adjusted

Commodity	Unit	Production in October 1989	Percentage change from previous month
Increase—			
Chocolate-based confectionery	tonnes	9,557	32.6
Television sets	'000	13.8	7.6
Cotton yarn	tonnes	1,820	5.3
Decrease—			
Petrol lawn mowers	'000	16	-23.9
Electric motors	'000	199	-17.5
Wool woven fabric	'000 sq m	587	-15.6

Of the nineteen categories for which trend estimates are available, nine showed increases in the year to October 1989 while the remaining ten recorded falls.

For further information, order the publication *Production Statistics, Australia*, Preliminary (8301.0) or contact Kevin Squair on (062) 52 5558

Home building materials prices up

Prices for house building materials increased by 0.8 per cent in September, lifting the annual rate of increase to 9.2 per cent. The increase in the annual rate halted the downward trend evident since October 1988.

As in previous months, Sydney and Perth continued to record annual rates of increase well above the average while Melbourne, Adelaide and Hobart recorded rates well below the average.

The September increase reflects higher prices for a wide range of materials. The main price increases were for electrical cable, following recent increases in copper prices, and plaster and plaster products. Prices for these materials increased in all capital cities.

PRICES OF MATERIALS USED IN HOUSE BUILDING, SEPTEMBER 1989 Percentage change

	From previous month	From corresponding period of previous year
Sydney	0.7	11.3
Melbourne	0.7	7.1
Brisbane	0.6	9.0
Adelaide	1.1	7.8
Perth	1.0	11.6
Hobart	1.0	7.4
Weighted average of six State capital cities	0.8	9.2
Canberra	0.2	8.8

For further information, order the publication *Price Index of Materials Used in House Building, Six State Capital Cities and Canberra* (6408.0) or contact Peter Sturgeon on (062) 52 6198

Laundries and dry cleaners are shrinking

The Australian laundries and dry cleaners industry continued its contraction in size over many years to the mid-1980s, and there are signs that the structure of the industry is also changing.

Employment in the industry has dropped from 20,000 persons in 1969 to 14,500 in 1980 and 12,500 in 1987. Turnover was 9 per cent less in real terms in 1987 compared with 1980. This decline may now have been reversed, however, as there was an increase in real turnover of over 4 per cent between 1986 and 1987.

Other noticeable changes to the industry between 1980 and 1987 were:

- ☐ an increasing level of concentration — the largest businesses (those employing 100+ people) accounted for 39 per cent of industry turnover in 1987, up from 31 per cent in 1980, and
- ☐ a relative decline in importance of dry cleaning, and an increase in the relative size of hiring of linen, uniforms, etc.

The industry involves three main 'sub-industries', each of about the same size in 1986-87:

dry cleaning —	34% of industry turnover
laundering —	30% of industry turnover
hiring of linen, etc —	33% of industry turnover.

As with other publications in this ABS series on the service industries, the laundries and dry cleaners publication contains detailed statistics on size of business, staff employment status (males, females; full-time, part-time; permanent, casual; proprietors, employees), types of takings and expenses, profits, and statistics by State.

For further information, order the publication *Laundries and Dry cleaners Industry, Australia (8658.0)*, or contact Peter White on (062) 52 5633

Further fall in export prices

Export prices fell for the second consecutive month in September. The September decrease of 0.7 per cent resulted in the annual rate of price increase falling to 6.1 per cent, compared with the 7.2 per cent annual rate recorded in August.

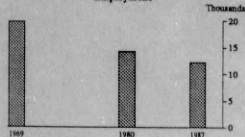
Approximately 50 per cent of the commodity items included in the index recorded lower prices in September. These falls were partly offset by price increases for a number of other items.

The main items to decrease in price were:

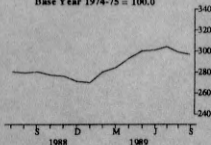
- ☐ copper, reflecting short term fluctuations in world prices.
- ☐ wool, due to falls in auction prices.
- ☐ mutton and lamb, reflecting increased supply.

Continued ...

LAUNDRIES AND DRY CLEANERS
Employment



EXPORT PRICE INDEX
Base Year 1974-75 = 100.0



EXPORT PRICES, SEPTEMBER 1989
Percentage change

Commodity	From previous month	From corresponding month of previous year
Food and live animals	-0.9	13.3
Crude materials	-0.5	0.3
Mineral fuels	—	14.9
Animal and vegetable oils	—	-22.4
Chemicals and other manufactured exports	-1.6	5.1
All exports	-0.7	6.1

For further information, order the publication Export Price Index, Australia (6405.0) or contact Peter Cordy on (062) 52 5541

Food for thought — the Cafes and restaurants industry

One in an occasional series of ABS surveys has collected information on the operations of cafes and restaurants. Interesting findings include:

- ❑ The industry comprises some 8,500 businesses operating at about 9,500 premises, employing 86,000 full and part-time staff, and having turnover of \$2,600m in 1986-87.
- ❑ Small businesses dominate — those employing fewer than 20 persons account for 93% of all businesses in the industry, 62% of industry turnover and 61% of employment.
- ❑ The industry increased its turnover by about 20% in real terms in the 7 years to 1986-87, and by about 1% between 1985-86 and 1986-87. Employment also grew significantly, predominantly in part-time jobs.
- ❑ For the average business in the industry, about 8.5% of its turnover was operating profit in 1986-87. This had declined from about 10.4% in 1979-80, the last time the industry was surveyed. The initial impact of the Fringe Benefits Tax may have influenced profit margins in 1986-87.
- ❑ If the proprietors of unincorporated businesses (partnerships and sole traders) are attributed an average salary, then the profit for the average business was about 1.5% of turnover. (However, analysis suggests some understatement of profitability in the statistics.)

The publication also contains statistics on size of business, staff employment status (males, females; full-time, part-time; permanent, casual) and types of takings and expenses. A proforma has been included to enable individual businesses to compare their own expenses and operating profit with the average result for the industry in their own State or for Australia as a whole.

For further information, order the publication Cafes and Restaurants Industry, Australia (8655.0) or contact Peter White on (062) 52 5633

Labour costs — the first comprehensive guide

For every dollar they paid employees in earnings in 1986-87, private sector employers paid 10.9 cents in other labour costs. Public sector employers paid more — 13.3 cents for every dollar paid out in earnings.

The figures contained in *Labour Costs, Australia, 1986-87* are derived from the first full-scale comprehensive survey of labour costs in Australia.

Across all industries, total labour costs per employee were \$22,536. Of these, on-costs were found to be \$5,129 per employee. As shown in the graphic, on-costs comprise both payments to employees for time not worked (e.g. annual leave and termination payments), and other labour costs (such as employer superannuation contributions and payroll tax).

On an industry basis, on-costs per employee were found to be:

- ☐ high in Mining (\$10,383); Electricity, gas and water (\$8,859) and Transport, storage and communications industries (\$7,229); and
- ☐ low in Recreation, personal and other services (\$2,026) and Wholesale and retail trade industries (\$3,237).

Further information shown in the publication includes details of labour costs on a costs per hour paid and costs per hour worked basis. Results are classified by public and private sector, State, industry and employer size, level of government and institutional sector.

Less detailed information, but for 1987-88, has been published recently in the related publication *Major Labour Costs, Australia* (6348.0).

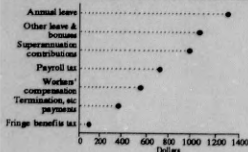
For further information, order the publication *Labour Costs, Australia* (6349.0) or contact Mirella Wilson on (062) 52 6321

Do you need detailed information on manufacturing industry?

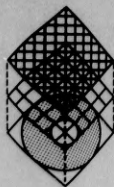
- ☐ The long-awaited publication, *Manufacturing Commodities: Principal Articles Produced, Australia* (8303.0; \$19.00), for 1986-87 details the A to Z of Australian manufacturing production. From Abrasives to Zinc Products, this publication contains tables detailing quantities and values for over 3,000 major commodities produced in Australia. (In addition, 600 of the more important commodities are published monthly in *Production Bulletins* 8357.0 to 8368.0.)
- ☐ For those wanting more information on the structure of manufacturing industry in Australia, the publication *Manufacturing Industry: Details of Operations, Australia* (8203.0; \$11.50) for 1987-88 is available now. This publication contains statistics from 31,606 manufacturing establishments classified by industry in Australia. It provides detailed information for your industry on employment, wages and salaries, turnover, number of establishments, etc.

You can order these publications by contacting Information Services (see page 10).

AVERAGE ANNUAL ON-COSTS PER EMPLOYEE



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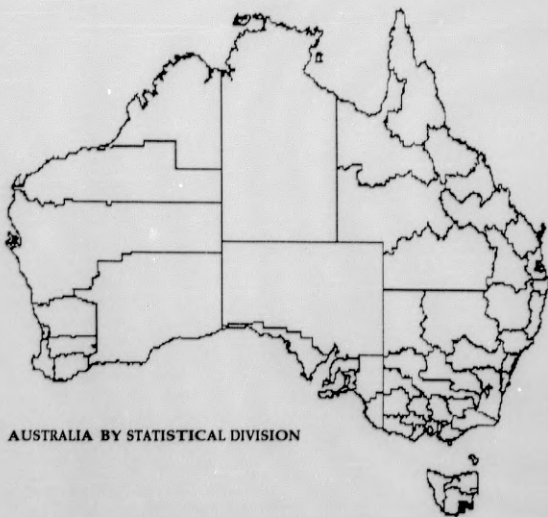
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Any suggestions for improvement to this publication should be addressed to:

The Editor
Statistics Weekly
(062) 52 6917

Statistics Weekly
30 November 1989

All the week's releases: 22 to 28 November

General

Statistics Weekly, 23 November 1989 (1318.0; \$3.50)
Economic Indicators, NSW, November 1989 (1307.1; \$3.00)

Census of Population and Housing

1986 Census of Population and Housing, PERTH ... a social atlas — Part 3
Ethnic Characteristics, June 1986 (2503.5; \$5.00) — *new issue*

Demography

Estimated Resident Population of Selected Areas, NT, 30 June 1989,
Preliminary (3201.7; \$4.20)

Social statistics

Lower Courts: Criminal Matters, SA, 1987 (4505.4; \$7.00)

National accounts, finance and foreign trade

Balance of Payments, Aust., October 1989 (5301.0; \$10.00)
Cash Management Trusts, Aust., October 1989 (5635.0; \$3.00)
Building Societies, Aust., September 1989 (5637.0; \$7.50)
Authorised Dealers and Money Market Corporations, Aust., September 1989 (5638.0; \$7.50)
Finance Companies, Aust., September 1989 (5639.0; \$7.50)
Lease Finance, Aust., September 1989 (5644.0; \$4.50)

Labour statistics and prices

Industrial Disputes, Aust., August 1989 (6321.0; \$5.00)
Export Price Index, Aust., September 1989 (6405.0; \$4.50)
Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, September 1989 (6408.0; \$3.25)
Price Indexes of Materials Used in Manufacturing Industries, Aust., September 1989 (6411.0; \$8.00)
Price Indexes of Materials Used in Coal Mining, Aust., September 1989 (6415.0; \$5.00)

Agriculture

Livestock Products, Aust., October 1989 (7215.0; \$4.50)
Fruit, WA, 1988-89 (7322.5; \$7.50)

Secondary industry and distribution

Production Statistics, Aust., October 1989, Preliminary (8301.0; \$4.50)
Production Statistics, NSW, July 1989 (8304.1; \$4.50)
Tourist Accommodation: Major Hotels and Motels, NSW, October 1989 (8646.1; \$5.00)
Dwelling Unit Commencements Reported by Approving Authorities, Qld, August 1989 (8741.3; \$4.50)
Tourist Accommodation, September Qtr 1989, Preliminary (8636.5; \$3.25)
Dwelling Unit Commencements Reported by Approving Authorities, WA, September 1989 (8741.5; \$7.50)
Tourist Accommodation Indicator, Major Licensed Hotels and Motels, SA, October 1989 (8646.4; \$5.00)

Transport

Motor Vehicle Registrations, Aust., September 1989 (9303.0; \$8.00)
Transport, Qld, 1987-88 (9101.3; \$7.50)
Motor Vehicle Registrations, WA, October 1989 (9303.5; \$5.00)
Motor Vehicle Registrations, Tas., October 1989 (9303.6; \$3.25)

Calendar of key releases

Expected releases over the fortnight to 12 December

November

- 29** Australian National Accounts: National Income and Expenditure, September Qtr 1989 (\$206.0; \$15.00)
 Australian National Accounts: Quarterly Data on Floppy Disk, September Qtr 1989 (\$228.0; \$60.00)
 Balance of Payments, Aust., September Qtr 1989 (\$302.0; \$15.00)
 Foreign Investment, Aust., September Qtr 1989, Preliminary (\$507.0; \$6.00)

- 30** Private New Capital Expenditure, Aust., Actual and Expected Expenditure to June 1990, September Qtr 1989 Survey, Preliminary (\$625.0; \$3.25)
 Price Indexes of Articles Produced By Manufacturing Industry, Aust., September 1989 (\$412.0; \$5.00)
 Building Approvals, Aust., October 1989 (\$731.0; \$8.00)

December

- 4** Registrations of New Motor Vehicles, Aust., October 1989, Preliminary (\$301.0; \$3.25)
7 The Labour Force, Aust., November 1989, Preliminary (\$6202.0; \$8.00)
 The Labour Force, Aust. — Preliminary Data on Floppy Disk, November 1989 (\$6271.0; \$60.00)

The latest ...

Changes to key State indicators — consolidated to
 28 November 1989



Statistics Weekly
 30 November 1989

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
— Percentage change from same period previous year —									
New capital expenditure (June qtr 89)*	20.8	11.7	13.1	3.5	6.3	78.0	n.a.	n.a.	15.9
Retail turnover (Sept. 89) (trend estimate)	14.7	5.4	10.6	6.0	13.7	10.3	n.a.	5.8	10.5
New motor vehicle registrations (Sept. 89)*	-2.2	51.6	-3.7	16.4	0.7	n.a.	7.0	82.7	13.2
Number of dwelling unit approvals (Sept. 89)	-14.7	-27.0	-38.9	-6.0	-38.1	-31.4	-47.5	52.5	-26.7
Value of total building work done (June 89)	38.6	42.1	34.4	22.9	54.9	17.4	-8.5	-3.0	36.8
Employed persons (Oct. 89)*	3.2	5.6	6.6	3.2	4.3	5.6	0.1	5.3	4.6
Capital city consumer price index (Sept. qtr 89)	8.1	8.3	7.8	7.6	7.8	7.2	7.0	5.6	8.0
Average weekly earnings (full-time adult ordinary time) (May 89)	9.0	6.6	7.7	6.9	8.0	8.2	5.6	6.6	7.8
Population (June 89)	1.1	1.3	3.2	1.1	3.0	0.6	0.2	1.6	1.6
Room occupancy rates in licensed hotels and motels, etc (June qtr 89)	-3.5	-0.7	-12.6	1.5	3.5	4.5	0.9	-10.0	-3.9

* Seasonally adjusted for States (but not Territories)

Key national indicators - consolidated to 28 November 1989

			Latest figure available		Percentage change (a) on		
			Original	Seasonally adjusted	Previous period	Corresponding period last year	
Period							
National production							
Gross domestic product	— current prices (e)	\$m	June qtr 89	85,333	87,970	2.5	13.1
	— 1984-85 prices (e)	"	"	60,986	62,991	0.6	3.9
Industrial activity							
New capital expenditure	— current prices (f)	\$m	June qtr 89	7,822	7,434	3.8	15.9
	— 1984-85 prices (f)	"	"	6,240	5,911	2.6	18.1
Expected new capital expenditure (f)		"	Six months to Dec. 89	15,157	n.a.	n.a.	15.1
Retail turnover	— current prices	"	Sept. 89	6,729	6,893	2.5	10.7
	— 1984-85 prices	"	Sept. 89	14,280	14,788	0.9	5.0
New motor vehicle registrations		No.	Sept. 89	55,232	55,231	10.2	13.2
Dwelling unit approvals (f)		"	"	12,394	12,440	5.5	-24.0
Value of all building approvals (f)		\$m	"	2,309	2,411	24.1	4.1
Value of total building work done	— current prices	"	June qtr 89	7,622	7,711	7.6	36.9
	— 1984-85 prices	"	"	5,138	5,198	4.7	21.1
Manufacturers' sales		"	June qtr 89	34,261	34,196	3.4	14.6
Expected manufacturers' sales		"	Six months to Dec. 89	70,922	n.a.	n.a.	12.0
Labour							
Employed persons		'000	Oct. 89	7,817.6	7,805.8	-0.1	4.6
Unemployment rate †	%	"	"	5.5	6.0	-0.1	-0.8
Participation rate †	%	"	"	63.1	63.3	-0.2	1.0
Job vacancies		'000	August 89	64.3	n.a.	-12.1	-2.3
Average weekly overtime per employee		hours	"	1.5	n.a.	1.6	10.7
Prices, profits and wages							
Consumer price index	1980-81 = 100.0	Sept. qtr 89	197.0	n.a.	2.3	8.0	
Price index of materials used in manufacturing industry	1984-85 = 100.0	Sept. 89	117.7	n.a.	-1.3	4.3	
Price index of articles produced by manufacturing industry (f)	1968-69 = 100.0	"	550.7	n.a.	0.3	6.5	
Company profits before income tax		\$m	June qtr 89	4,610	5,054	9.3	24.6
Average weekly earnings (Full-time adults; ordinary time)		\$	August 89	509.70	n.a.	1.7	8.2
Interest rates (b) (monthly average)							
90-day bank bills †	% per annum	Oct. 89	18.35	n.a.	0.0	4.3	
10-year Treasury bonds †		"	13.55	n.a.	-0.1	1.7	
Balance of payments							
Exports of merchandise	\$m	Oct. 89	3,989	4,090	-0.3	17.1	
Imports of merchandise	"	"	-4,740	-4,338	-6.5	11.4	
Balance on merchandise trade (c)	"	"	-751	-248	53.8	38.2	
Balance of goods and services (c)	"	"	-1,171	-598	29.1	-7.6	
Balance on current account (c)	"	"	-2,242	-1,657	14.2	-17.6	
Terms of trade (d)(e)	1984-85 = 100.0	Sept. qtr 89	n.a.	112.8	-0.3	11.5	
Foreign investment							
Net foreign debt (e)	\$m	30 June 89	108,159	n.a.	3.7	19.8	
Net foreign liabilities (e)		"	140,906	n.a.	4.5	16.3	
Exchange rates (monthly average)							
US\$	per \$A	Oct. 89	0.7749	n.a.	0.4	-4.2	
Trade weighted index	May 1970 = 100.0	"	60.1	n.a.	-0.8	-1.2	
Other indicators							
Population (estimated resident)	million	June 89	16.8	n.a.	0.4	1.6	
Overseas visitors	'000	Sept. 89	150	183	0.4	-15.1	

(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. (e) Later figures released on Wednesday, 29 November 1989. (f) Later figures released on Thursday, 30 November 1989. 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 10). 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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