PAPER 8.6

ABS STRATEGY FOR SERVICE STATISTICS

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Abstract

This paper presents the ABS strategy to satisfy the ever increasing demands for services statistics. The strategy consists of seven elements:

- introduction of comprehensive sub-annual measures of services industry output
- an enhanced annual overview of the structure and operation of the service industries sector
- a revamped program of periodic collections in respect of service industries and across-industries services activities
- accelerated development of producer price indexes for service industries
- development of quarterly and annual constant price service industries production indexes
- development of productivity measures for service industries
- implementation of an enhanced quarterly program of trade in services statistics.

This paper is presented to the Voorburg Group to highlight the complexity of the issues involved and outline the ABS response. The ABS would welcome comment on the strategy adopted and advice as to whether other members are adopting similar strategies or are developing different solutions to meet the demand for services statistics.

1. This paper outlines the ABS strategy for the provision of services statistics over the next 5-6 years. It is drawn from a range of papers prepared in the ABS over the recent period addressing this issue and highlights the proposed changes to ABS work programs to meet the needs of users for more information about the services sector.

2. The strategy outlined below has been developed with the aim of satisfying the key user requirements in respect of services statistics - both for industries expressed in terms of major activity and for services indicators cutting across industries (a growing area of interest). The requirements can be summarised as follows:

- More comprehensive current information concerning service sector economic activity/output (in both current and constant prices).
- More detailed annual information concerning broad service industry economic activity including measures of performance.
- In-depth studies of individual service industries and/or activities for use in micro-economic analysis.
- More information on technology related statistics on an economy wide basis, but particularly in respect of service industries.
- Relevant, relatable services price indexes, both for use in their own right as signals of upstream price pressures and in deflation of current price services output measures.
- Comprehensive and timely information concerning international trade in services.

3. In response to these requirements the enhanced program of services statistics focuses on seven key streams:

A introduction of **comprehensive sub-annual measures of services industry output** (using turnover as the best available indicator across industries), to provide a broad indicator of performance in the service industries sector, and input (along with appropriate producer price indexes) to a constant price index of service industry production;

B an **enhanced annual overview of the structure and operation of the service industries sector**, in the context of the overall 'market' economy, to identify the contribution of the service industries sector to the performance of the Australian economy;

C a **revamped program of periodic statistics on the nature, structure and operation of detailed service industries**, **and of significant across-industries services activities**;

D **accelerated development of producer price indexes for service industries**;

E **development of quarterly and annual constant price service industries production indexes** based on Streams A, B and D above;

F **development of productivity measures for service industries**, based on constant price outputs from Stream E above as the numerator and appropriate measures of labour and capital inputs as the denominators;

G implementation of an **enhanced quarterly program of trade in services statistics**, targeted at the main user needs in terms of range, frequency, quality and detail.

4. The proposed strategy for each of these streams is summarised below.

Stream A - Comprehensive sub-annual measures of services output

5. The ABS has a range of regular sub-annual market economy-wide (including the service industries) collections to measure some elements of economic activity such as capital expenditure, stocks, employment and earnings. However, coverage of the output of the services industries has been up to now very limited.

6. Specifically, the monthly retail survey collects turnover for most aspects of the retail sector, part of the hospitality industries and some elements of personal services. Similarly, for the wholesale sector there has been (as part of the survey of stocks and sales) a quarterly collection of sales. However, for other service industries, while there are some

indirect indicators (such as the Tourist Accommodation Survey's estimates of takings) there are no direct measures of output to support regular monitoring of the contribution of the service industries as a whole to growth in the economy.

7. To address this deficiency, the current quarterly Survey of Stocks and Sales will be extended during 1996-97 to collect sales for those service industries in scope of that collection (other than retail, which has its own survey), and, for other services industries (the majority), a separate survey will be instituted collecting data on turnover or sales as the most readily available common proxy measure for industry output. (For the major components of the Finance sector a different concept of sector output is required, in recognition that the sector's main activity is financial intermediation, the output of which cannot be measured directly. A similar situation exists for the Insurance sector. Work is in progress, in parallel with international developments, to develop appropriate measures for Australia.)

8. In the ABS's view a basic user need is to identify those components within the service industries sector that are contributing to its growth. To meet this need, sample sizes will be set to enable estimates to be derived at the ANZSIC Sub-division level.

9. A study has been commissioned into the feasibility of combining a number of our existing quarterly surveys (capital expenditure; stocks and sales; company profits; employment and earnings) into a quarterly economic activity survey (EAS) which would be tightly coupled, in terms of scope, units, survey design, etc. to the annual economic activity survey. If such an approach proves feasible, then the proposed expansion of the stocks and sales survey would be encompassed within it.

10. An important sub-annual services indicator which cuts across industries as traditionally defined relates to the movement of freight by commodity and mode of transportation. The Freight Movements Survey covers movements by all industries and sectors of the economy, whether they are carried by transport (hire and reward) operators or moved by ancillary operators in other industries moving goods on their own account. Results have now been published, but are regarded as experimental and considerable work remains to be done before the road segment of the output is of acceptable quality. A recent methodological study has confirmed these concerns and an upgraded methodology is being developed. It is expected to be available for implementation from March quarter 1998. If the methodology proves to be sound, it is proposed that the survey proceed thereafter only if half its cost is met from user funding.

Stream B - Enhanced annual overview of the structure and operation of the service industries sector

11. The existing Economic Activity Survey provides annual 'market' economy-wide (including the service industries) measures of industry sector performance in terms of employment, income and expenses, profitability, assets and liabilities etc. The current sample design does not adequately support estimates below the ANZSIC Division level,

and so cannot accurately identify those parts of the service industries sector that are growing or contracting, and their relative contribution to the Australian economy. We judge that ideally users would like annual data at the ANZSIC Group or Class level for this purpose, but that a reasonable ABS response, in the context of the across-sectors, time series orientation we envisage for the EAS, is for reliable estimates at the ANZSIC Sub-division level, possibly with dissection to Group for a few Sub divisions.

12. The current data quality thrust of the Economic Activity Survey project is focused on investigations to improve the estimates from the survey through supplementation of the sample of units directly surveyed with a further substantial sample of units where data will be extracted from tax records (for both employing and (potentially) non employing units). Such a strategy is relatively low cost, results in no additional costs to data providers, and would result in a significant improvement in the quality of estimates which would meet the key user requirements for quality estimates at the Sub-division level.

13. This strategy is highly dependent on successful developments within the Australian Taxation Office in terms of its own processing strategies, to ensure timely delivery to the ABS of annual company tax and other files and that the data contained on those files are reliable.

14. The strategy for the annual Economic Activity Survey can be summarised in terms of three elements:

Element 1 Increase the size of the EAS short form collection to enable production of estimates at Sub-division level with significantly lower sampling error.

Element 2 Increase the size of the income tax sample of employing businesses to enable estimates of acceptable quality to be produced for:

- Subdivisions,
- selected Groups, and
- Division x State.

Element 3 Implement a more rigorous strategy for producing estimates for non-employing businesses from income tax data, by selecting a sample from the 140,000 or so units with business income of more than $100,000.

For the 1995-96 (reference year) EAS, further testing of this strategy will be undertaken. The current design will allow Industry Sub-division estimates to be produced. Once the incorporation of ATO data has proven successful it is intended to expand the EAS output to better satisfy the user need for below Sub-division level data in specific areas.

Stream C - Revamped program of periodic statistics on detailed service industries

and significant across-industries services activities

15. The great strength of the annual Economic Activity Survey is its capacity to show growth in industry sectors over time. However it is very unlikely that the EAS will ever of itself satisfy the requirements of users seeking detailed information in respect of individual ANZSIC Classes or service activities, for two reasons.

16. The first is that a major element in all service industry collections to date has been the need for extensive coverage development to ensure that the great majority of in scope entities are included in the population and can stand a chance of selection. This has been necessitated by the present limitations of the Business Register in terms of coverage, in particular the absence of non employing businesses, some variability in the quality of industry classification (mainly at the detailed level) of businesses on the Register and the complex organisational structures of businesses in some service industries.

17. The other reason why the EAS is unlikely to be satisfactory for this purpose is that its standard data set has no activity dimension, and as such is inadequate to meet the need of users for a range of service industry-specific information, and for out-of-industry activities where these are important.

18. There is a strong demand for information in respect of individual service industries (ANZSIC Classes). Such demand is primarily for the industry in its own right, but also as a component of the services sector as a whole. User demands are for structural data such as number of businesses, income and expenses, assets and liabilities and for a range of industry-specific, and out-of-industry, activity measures, including revenue classified by type of service provided. Users require State level data and would ideally like a regional dimension to the data. Perhaps most importantly, they require the data to be collected on a regular basis to support the development of time series. The user demands are not unlike those in traditional industry sectors such as manufacturing and agriculture which gave rise to the annual surveys of those industries, with the important additional dimension of the interest in out-of-industry activity measures.

19. In the case of most service industries the costs of an annual census or survey producing data at the ANZSIC Class level would be very substantial, in terms of both ABS processing costs and provider load, mainly due to the large numbers of units and the preponderance of small businesses.

20. Given the above and the factors noted earlier there is inevitably a need for significant survey development work, including extensive coverage development, prior to the conduct of a services collection. Further exacerbating the costs of services collections has been the fact that they have usually involved breaking new ground; because no previous major collection has been conducted (or not for some time) within the industry or the activity there are often collection difficulties.

21. In outlining the strategy for the current program of service industries collections, two

factors emerge as particularly important:

- the user need for comparisons over time
- a differing user view of 'industry' to that used by the ABS.

22. In relation to the first, users of service industries collections are not unlike other users; having established the baseline data from the initial collection, their primary requirement is to develop a time series to measure change over time. In that regard it is possible that the current six year cycle envisaged for some of the collections in the current program will not be seen by users as adequate. The frequency of service collections will continue to be revisited in the light of user reactions to the results of surveys currently in the field and planned.

23. In relation to the second issue, the user view of industry increasingly cuts across or involves a combination of ANZSIC Classes, and a particular Class may be part of a number of user views of industry. For example, clubs can be viewed as part of the sports industry, as part of the gambling industry or as part of the cafes and restaurants industry.

24. The **'Tourism industry'** provides the major example of a user view of industry different to the standard ABS concept of industry, exemplified in the classification of businesses to an industry based on their major activity, and the formation of industries from businesses so classified. Tourism is best seen statistically as a 'demand' side activity, defined in terms of the activities of a particular type of consumer. It involves the purchase or consumption by visitors of any commodity. It is not confined to particular commodities or to particular economic activities on the 'supply' side, ie on the part of businesses supplying a range of services, to tourists and others.

25. This user view creates particular challenges for developing a service statistics program given that it has to encompass certain activities of businesses classified to a range of service industries such as accommodation, cafes and restaurants, transport and casinos. Ideally data for all such related industries should be collected for the same reference period and the program of industry collections attempts, within resources available, to bring related industries together in the same year of the cycle.

26. With the strong growth in tourism in recent years, there has been an increasing recognition of the importance of the level of economic activity which results from it. This is being reflected in considerable and growing data demands. In response to these demands, the ABS in recent years has expanded its measures of tourism activities, through extended and more timely data from the Survey of Tourist Accommodation, a wider range of publications such as the quarterly *Tourism Indicators Australia* and the *Directory of Tourism Statistics*, and development of standards such as the *Tourism Statistics Framework* and the *Australian Standard Classification of Visitor Accommodation*. A proposal is being developed to extend the Tourism program's research capacity, particularly to accelerate work on the development of standards for definitions and classifications in the

tourism field, undertake more analysis of available data, and enhance users' awareness of the data and analyses available.

27. A further example of the issue of a different user view of industry, is the **'Information Technology' (IT)** industry, which includes not only elements of the Business Services, Communications and the Wholesale and Retail sectors, but also of Manufacturing. As the IT sector is fuelling rapid and profound changes in business and society generally, it is important for the ABS to provide official statistics on the growth and performance of the sector. The initial 1992-93 survey of IT related industries is being repeated for the reference period 1995-96. Data will be collected both about the structure and performance of the industries concerned and about their inputs and outputs of products and services. As previously, the survey will be coordinated with other ABS collections.

28. The Household Survey on the use of IT in the home is being conducted throughout the whole of 1996 using the Population Survey Monitor collection vehicle.

29. There are other areas where ANZSIC does not adequately represent user views of an industry (eg on an activity basis, which includes out of industry activity). The Classification program is investigating how to best incorporate these views into ABS statistical programs.

30. **Strategy for Service Industries Collections**. Taking into account the two factors referred to in paragraph 21, the proposed strategy for each of the ANZSIC Divisions within the services sector is detailed in the Appendix, and summarised in the chart at the end of the Appendix. It should be noted that the strategy beyond the current triennium is tentative at this stage and has not been fully costed. Further it will be dependent on user reaction to the surveys in the current triennium and their assessment of their information needs for the future.

31. The program envisages a rotating set of collections that will cover most industries in the services sector. Most industries will be covered on a three yearly or six yearly basis. However some sectors will still not be covered as the assessment has been made that there is already sufficient data in respect of the industry or alternatively it is not considered that there is sufficient user demand.

32. The construction, retail and wholesale industries are included in the attached diagram. At this stage the construction industry survey is scheduled for 1996-97 on a partial user funded basis and the future strategy will be reviewed subsequent to that collection. Similarly the retail and wholesale industries, which have recently been the subject of an internal review, are scheduled for collection in respect of 1997-98, and the future collection strategy will be determined subsequent to that collection. On the other hand the transport industry has been excluded from the program at this stage as collections in this field are subject to separate review.

33. Finally, it needs to be reiterated that the program is tentative and dependent on user reaction to the initial surveys. For example it is currently proposed that the surveys of the

private sector of the medical professions industry, and community services sector collected for the first time in 1994-95 and 1995-96 respectively, be left at this stage on a six yearly cycle. However, that frequency may have to be revisited, as the likely support of users for repeats of those surveys earlier than now envisaged is expected to be high, for the reason outlined in paragraph 22.

34. Similarly in the case of Libraries, museums and the arts, the chart reflects the proposal to conduct collections for those industries on a 3 yearly frequency following an initial survey in respect of 1996-97. If the survey is unable to produce the data of interest to the users, a distinct possibility given the interest in activity data and the nature of the industry (many self employed part time performers), or if the demand for data is not substantiated then the frequency could be lengthened to six years.

Stream D - Accelerated development of Producer Price Indexes for services industries

35. The usefulness of output measures (whether quarterly, annual or less frequent), as proposed under Streams A, B and C, will be greatly enhanced if they can be expressed in constant price terms. For this purpose, the coverage of the Producer Price Index (PPI) collections requires extension further into the services industries. Such indexes will also be of interest in their own right as signals of upstream price pressures.

36. Resources have been allocated for the PPI Program to expand the range of services industries covered by price indexes. The industries identified as having highest priority for the next round of development are complex and diverse. The three ANZSIC Sub-divisions are Road freight, Property services and Business services. Road freight is very important because of its impact on many other industries and because freight costs are a significant component of margins. An index has already been developed for the Real estate agents group within Property services, and it is proposed to cover the remaining groups. Business services include a very heterogeneous group of industries that impact on other industries and are collectively significant in overall services output. This Sub-division includes industries as divergent as architectural services, consulting engineering services, computer consultancy, legal and accounting services and advertising services. As indicated in the Appendix, these industries are also a priority for detailed rotating industry collections.

Stream E - Development of quarterly and annual constant price service industries production indexes

37. As the source data arising from Streams A - D become available, the Constant Price Estimates Program will be in a position to develop and compile improved industry gross product estimates and the production indexes for the services sector.

38. The strategy envisaged for doing this entails bench marking the quarterly industry gross product estimates (derived from the collection proposed in Stream A and the producer price index information from Stream D) to the annual benchmarks provided by the constant price input-output tables. This will substantially improve both the quality and consistency of quarterly constant price estimates of the output of service industries.

Stream F - Development of productivity measures for service industries

39. Service industry productivity analysis is currently compromised by data shortcomings and conceptual difficulties. A sound understanding of productivity changes in the service industries is needed for the purposes of macro-economic and industry policy (because these industries are of increasing economic significance and many are subject to rapid technological change). Useful productivity measures for these industries are dependent on substantial advances in the availability of service industry price data (Stream D above) and on consequential improvements to constant price estimates (Stream E above).

40. A work program has been drawn up, focusing initially on research to identify the main problem areas and learning from overseas experience. The aim is to draw on the progressive development of real output measures from Stream E and appropriate measures of labour (and capital) inputs to develop measures of services labour productivity, and improved measures of market economy (including services) multi-factor productivity.

Stream G - Enhanced quarterly program of trade in services statistics, targeted at the main user needs in terms of range, frequency, quality and detail

41. There is a very strong interest in statistics on international trade in services. (These statistics are also an integral part of the compilation of balance of payments statistics.) The data cover exports and imports of services by all sectors of the economy and are compiled on monthly, quarterly and annual bases. The main dissections are by commodity, country and industry.

42. Australia's total trade in services has nearly tripled (from $12.9 billion to $38.2 billion) over the decade to 1993-94. In the same time frame, its contribution to Australia's total goods and services trade has grown from 18 to 23 per cent. One component of services in particular - exports of travel services - has exhibited spectacular growth (426 per cent) during the decade.

43. Despite the growth in the size of services trade data, the amount of detail available is still small, especially on a monthly and quarterly basis. To date, monthly services statistics have been split into three major commodity groupings: transportation, travel and other services, with transportation further split into shipment and other transportation. There are 14 services commodities currently identified quarterly, but no partner country splits. Most

detail is available on a financial year basis, where 44 services commodities are identified; just over half of these can be further split by partner country. Over recent years, the ABS has been progressively adopting revised international standards for classifying trade in services, requiring almost doubling of the number of services commodities. Nevertheless, in contrast with merchandise trade data, the amount of detail is still quite small. Merchandise trade data are available for thousands of detailed commodities on a monthly basis, further split into as many countries as confidentiality will allow.

44. The quality of Australia's international trade in services statistics largely corresponds with the frequency and timeliness of their release and the level of detail involved. While sample errors are considered low for broad annual aggregates, they are high at detailed commodity level, ranging up to 50%, and higher still when commodities are classified by country. Non-sample errors are also of concern for some estimates. In addition, initial quarterly estimates usually undergo significant revisions once results from annual or less frequent data sources become available. Recent work on comparisons of Australia's services trade data with data compiled by partner countries has also indicated substantial bilateral discrepancies.

45. The currently available estimates are therefore of very limited use for analysis of current developments in the commodity composition of Australia's services trade, including the sources of imports and the destination of exports. There is strong pressure for improved data from a wide range of domestic and international users. They require accurate and reliable quarterly data for detailed commodities classified by partner country and State.

46. The highest priority improvements which are being implemented from September quarter 1996 are : first, to expand the size of the quarterly ABS Survey of International Trade in Services to provide more accurate and reliable quarterly estimates, particularly at detailed commodity and country level; and second, to collect additional commodity and partner country detail (including sufficient detail to meet Australia's international reporting obligations), as well as State dissections.

47. There is also a need to improve user understanding of the existing statistics and the developments in progress. A strategy for achieving this is being prepared and will be implemented during 1996-97.

48. Users have also raised concerns about the gap in related statistics on services trade conducted through off-shore affiliates (termed 'establishment trade'). Submissions by DIST, DFAT and Austrade to the Parliamentary Inquiry into Services Exports, as well as the LEK report into Services Exports, have argued that data on total exports of services need to be supplemented by establishment trade data to understand developments in Australia's export performance. DIST have also flagged their interest in statistics on the activities and performance of multinational enterprises, commonly referred to as "globalization indicators". There are no current plans to measure establishment trade, but if significant pressure emerges for the ABS to develop measures of establishment trade and

globalization, the priorities for this work will be reviewed within the context of the services statistics work program.

Summary

49. The ABS is investing substantial additional resources into its services statistics work over the coming years. The program will be continually assessed to ensure it reflects the emerging user priorities for statistics in this increasing important component of the Australian economy.

APPENDIX

Proposed Services Industries Program

Accommodation, Cafes and Restaurants (ANZSIC Division H)

erns and bars have also been included as part of the Sport, Recreation and Gambling survey in respect of 1994-95. Surveying this Division is seen as a high priority, in the context of the demand for information about the "Tourism" industry - in ABS terms the range of tourism-related industries.

.995-96 reference year. Also because of the strong user interest in Casinos (ANZSIC Class 9322) this industry will be surveyed in 1995-96 at the same time as Accommodation. It is further proposed to repeat these collections, along with a collection of Cafes and restaurants**,** pubs, bars and taverns, and clubs (ie the balance of Division H) in 1997-98 to align them with the sport, recreation and gambling industries, with which there is much synergy from the tourism perspective. The Travel Agency industry (ANZSIC 6641) which is also of interest to tourism users has been included in the Program for 1996-97 reference year. It is proposed to repeat the collections at three yearly intervals thereafter; the collections in respect of 2000-01 would capture the impacts on these industries of the 2000 Olympics.

y Survey in respect of 1983-84. As indicated above some elements of the Division, namely long distance bus transport (class 6121) and travel agency services (class 6641), are viewed as not only being part of the transport industry but also as parts of the 'Tourism' industry. As further noted above it is proposed to conduct a collection of the travel agency industry in respect of 1996-97.

peat of the 1983-84 survey does not justify conducting it, relative to the priority for expanding other parts of the Services Industries Program. A strategic review of the transport statistics program proposed for the second half of 1996-97 as part of the current planning round will, inter alia, canvass the needs of transport statistics users for the kinds of data provided by a Transport Industries Survey. If supported by strong user needs, a proposal will be brought forward in the 1997 Planning Round for a survey of at least parts of the Transport sector in respect of 1997-98.

of the transport industry would be required by users. For example there exists considerable alternative information in respect of Air (Sub-division 64), Rail (Sub-division 62) and Water (Sub-division 63) transport. The expectation is that the major user demand will be in respect of Groups 611 Road freight transport, 612 Road passenger transport and Classes 6642/3 Road and Other freight forwarding, due to the extent of deregulation in these industries and the absence of data since 1983-84.

ı have been compiled in respect of Telecommunication services (Group 712) as part of the 1992-93 and 1995-96 Information Technology Statistics collections. User interest is primarily in the area of Telecommunications services as opposed to Postal and communication services (Group 711) due to deregulation and rapid changes occurring in the industry. For this reason, and the relatively small number of participants in the industry it is proposed to collect data in conjunction with the annual EAS.

the ABS Financial Accounts Program, along with the Reserve Bank, the Insurance and Superannuation Commission and other public sector agencies with a major interest in this sector. Major initiatives are being undertaken by the Program to improve the datasets from banks, other financial institutions and insurance companies, in conjunction with the implementation of changes related to the new System of National Accounts (SNA). This work is expected to largely meet the needs of users.

plemented by the aggregate industry structure statistics compiled annually from the Economic Activity Survey.

of this Division lies in its capacity for employment and export income generation.

ber of the industry classes in this sector were released in 1995. The 1992-93 round covered the 13 most important Classes (eg legal and accounting, real estate agents, computing services, technical services) of the 26 Classes in this Division. A few of the remaining industries have been surveyed previously (in respect of 1987-88) but were not considered of sufficiently high priority to be included in the more recent survey round. It is considered that key industries in this sector will need to be surveyed at three yearly intervals; for the other industries a six yearly frequency would seem sufficient. It is proposed to repeat the surveys of the key industries in respect of 1995-96. Cleaning Services (ANZSIC 7866) will be included in the Program in respect of 1996-97 because of its synergy with the Waste Disposal that will be conducted in that year. The initial surveys of other property and business services would be in respect of 1998-99, in conjunction with the next round of surveys of the key business services industries to present a total picture of the property and business services sector.

ts Program largely meets the needs of its users, although it may be necessary from time to time to include relevant parts in the various industry studies (eg Community services where Government departments are a significant component of the industry as a service provider, as is planned in respect of 1995-96).

r Accounts Program, and for the private education sector small specialised surveys are conducted to assist in the compilation of the national accounts. On activities, ABS collects statistics on schools, students and staff in conjunction with the Australian Education Council; higher education statistics are the responsibility of the Department of Employment, Education and Training. It is considered that this program meets user requirements sufficiently well. However it is proposed to include Preschool education (class 8410) as part of the community services surveys for the 1995-96 reference year.

/ (ie GPs - class 8621, Specialists - class 8622 and Pathology businesses - class 8631) were conducted in respect of 1994-95. Development work has been undertaken on a survey of the community services industry (which will cover Sub-division 87 - Community services and classes 8410 - Preschool education and 8613 - Nursing homes) to be conducted in respect of 1995-96. The future frequency for surveying these sectors has been tentatively set at six years. However, given the high user interest in the development of the current surveys and the willingness of users to partly fund the collections, a six yearly frequency may prove insufficient, once users have had an opportunity to assess the results of the initial surveys.

classes 8611 and 8612) of this sector are derived from three sources, namely the ABS's Public Sector Accounts Program, the ABS Private Health Establishments collection and the various data collections undertaken by the Australian Institute of Health and Welfare. These three sources provide a reasonably comprehensive picture of the hospitals industry.

ctor (eg Dental services, Optometry and optical dispensing, Veterinary services) is also strong, and it is proposed to conduct the first surveys for these classes in respect of 1997-98.

dio services were surveyed in respect of 1993-94. Industry groups 931 Sport, 932 Gambling services and 933 Other recreation services are being surveyed in respect of 1994-95. User interest in data for these industries is high, as demonstrated by the preparedness of users (in the case of sport, gambling and recreation) to partly fund the survey. Subject to the reaction of users to the initial surveys it is anticipated that repeats of the surveys every three years will be appropriate.

Libraries, 922 Museums, 923 Parks and gardens, 924 Arts, 925 Services to the arts, in respect of reference year 1996-97, with the expectation that users will seek information on a three yearly basis.

of the Retail census. These are Classes 9511 Video hire outlets and 9522 Photographic film processing (included in 1991-92 surveys), 9521 Laundries and dry cleaners, 9523 Photographic film studios and 9526 Hairdressing and beauty salons (included in 1986-87 surveys). Little is known of user demand in relation to the remaining 13 classes, such as Personal and household goods hiring, Funeral directors, Gardening services, Religious organisations, Interest groups and Public order, other than to note demand for data in respect of Waste disposal services.

m for 1996-97 with a view to repeating the collection in three years given the small numbers of businesses involved. This would, however, be subject to user reaction to the results of the initial survey and the competing demands for data for other sectors. Other parts of the personal services sector will need to be further assessed to determine if any collection activity is appropriate.