

Tourism Satellite Accounts 2008–09: Summary Spreadsheets

The Economic Contribution of Tourism to Australian States & Territories

Report by

The Centre for Economics and Policy

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Chapter 1

Introduction

This report provides summary estimates of the contribution of tourism to the economies of each of the Australian states and territories. It is benchmarked to the Australian Tourism Satellite Account (ATSA) produced by the Australian Bureau of Statistics (ABS)¹.

The report follows previous Tourism Satellite Account (TSA) Summary Spreadsheet Reports which were published by the Sustainable Tourism Cooperative Research Centre (STCRC) for the reference years 2003–04², 2006–07³ and 2007–08⁴.

What is a Tourism Satellite Account?

A TSA measures the size or economic contribution of tourism. It includes the production of goods and services required to meet demand by visitors (output), and the additional value (value added) created in the process of producing these goods and services including employment.

A TSA also provides information about the detailed composition of the tourism industry, for example, by indicating how much value added is produced in individual industry components such as accommodation or transport.

Primary sources for TSA estimates

The state and territory TSA estimates are based on:

- the principal tourism surveys carried out by Tourism Research Australia (TRA) – the International Visitor Survey (IVS) and National Visitor Survey (NVS), and analysis of regional tourism expenditure developed by TRA; and
- the Australian Tourism Satellite Account (ATSA) produced annually by the ABS.

In addition, the work draws on databases developed by the Centre of Policy Studies (CoPS) at Monash University for its Monash Multi-Regional Forecasting (MMRF) model. The MMRF database has been extended to deepen its coverage of tourism as part of the research for these TSA reports.

Wherever possible in developing the estimates set out in this report, methods and data sources have been used which are consistent with those adopted for the ATSA. The results have also been reconciled against the ATSA to ensure overall consistency.

Tourism's national contributions 2008–09

Direct Economic Contributions and Employment 2008–09

- Gross value added (GVA) \$30.0bn (2.6%)
- Gross domestic product (GDP) \$32.8bn (2.6%)
- Net taxes on tourism products and services \$2.8bn
- Tourism directly employed 486,200 people (4.5%)

Source: ABS 2010a

Indirect Economic Contributions and Employment 2008–09

- Gross value added (GVA) \$33.6bn (2.9%)
- Gross domestic product (GDP) \$37.4bn (3.0%)
- Tourism indirectly employed 402,900 people (3.7%).

Total Economic Contribution of Tourism 2008–09

- Gross value added (GVA) \$63.6bn (5.5%)
- Gross domestic product (GDP) \$70.3bn (5.6%)
- Employment of 889,000 people (8.2%)

1 Australian Bureau of Statistics 2010a

2 Spurr et al 2007a

3 Ho et al 2008a

4 Pambudi et al 2009

Important revisions to methods and data

A series of important revisions were introduced by the ABS in the 2008–09 ATSA which affect a number of components of the TSA. These have been incorporated into the estimates in this report. These revisions include:

- introduction of revised and updated ABS supply and use tables;
- implementation of changes to the method of calculating certain components of the TSA, notably in relation to retail trade (sales of clothing, souvenirs and other goods to visitors through retail establishments), as a result of revisions to the international standards (TSA:RMF 2008⁵);
- implementation of new industry classifications (ANZSIC 2006) CPC V2.0, ISIC Rev.4; and
- improved migration statistics.

The amendments to estimations of Retail services as a result of TSA:RMF 2008⁶ have had a significant downward effect on the aggregate TSA estimates. This has occurred because value added in the manufacture of items for sale to visitors, which was previously included as tourism output in the TSA, is now excluded. In other words, only the retail margin is now included in the direct value of retail services in the tourism industry. The decline occurs only in the case of the TSA (direct) estimates in this report, as the manufacturing value added is restored in estimating the indirect effects referred to in Chapter 3.

In addition, the development of more accurate migration data has led to more precise estimates of the proportion of overseas students in Australia who fully meet the definition of a tourist (as remaining in Australia for less than one year). This has also had a downward effect on the education estimates in the TSA.

The extent to which these revisions impact on the overall TSA estimates is shown by applying the new methodology to the ATSA estimates for the previous year, 2007–08. Use of the new methodology results in a decline in tourism's share of GVA from 3.2 per cent to 2.8 per cent.

There has also been a change in the source of input-output data used in the preparation of the indirect tourism contribution, and consequently total (direct plus indirect) contribution estimates (see Chapter 3).

Comparing results with those from previous years

The revisions referred to above make direct comparisons between the 2008–09 TSA estimates and those in the STCRC state and territory TSA series from previous years even more problematic than usual (see Chapter 4).

To enable comparability across the time series, however, back cast results are provided in Chapter 4 for the key TSA estimates for tourism's direct GVA, GSP and employment contribution for the years 2003–04, 2004–05, 2005–06, 2006–07, 2007–08 and 2008–09.

The effects of the revisions to the input data referred to above carry through into the estimation of indirect and total contribution provided in Chapter 3. These effects—together with a change in input-output data from which the indirect multipliers are derived—have made comparison of indirect and total contribution with estimates from preceding years particularly unreliable.

⁵ UNSD et al 2008

⁶ UNSD et al 2008

Background to the report and methods adopted

The Centre for Economics and Policy (CEP) has produced this report for Tourism Research Australia (TRA). This report essentially uses the same methodology as that adopted by CEP for previous state and territory TSA reports for the then Sustainable Tourism Cooperative Research Centre (STCRC).

This report (developed for the year 2008–09) adopts the internationally agreed TSA concepts, methodology and definitions in developing a set of TSA for each Australian state and territory, which are based on the format of the ATSA published by the ABS.

Additionally, they are consistent with the ATSA in terms of concepts, definitions and primary tourism data sources. Definitions of selected terms and further background information are provided in Appendix A, while Appendix B outlines the method and data sources underlying the estimates.

The TSA estimates for each of the states and territories in this report have been reconciled against the most recent ATSA results, published by the ABS on 14 June 2010⁷. This ensures that the individual state results sum to the national totals, and that individual data problems have been resolved in ways which do not compromise consistency across the national and state TSAs.

Using this information

The information derived from these measures can be used to gain an understanding of the size and composition of the tourism industry in each of the Australian states and territories.

These estimates provide a means for any state or territory to make comparisons between tourism and other industries in that state, to measure the contribution of tourism to its economy over time, and to make comparisons with other benchmarks such as Australia as a whole.

Such analyses provide evidence to assist policy making related to tourism and in the allocation of investment across a broad cross-section of tourism related areas such as transport, water infrastructure, hotel development and built and natural attractions.

The information provided in a TSA can inform policy and planning at all levels of government, and inform the representative bodies of the tourism industry and tourism operators in the areas of industry investment, advocacy, marketing, education and training.

⁷ Australian Bureau of Statistics 2010a

Chapter 2

Direct economic contribution

Summary of key results

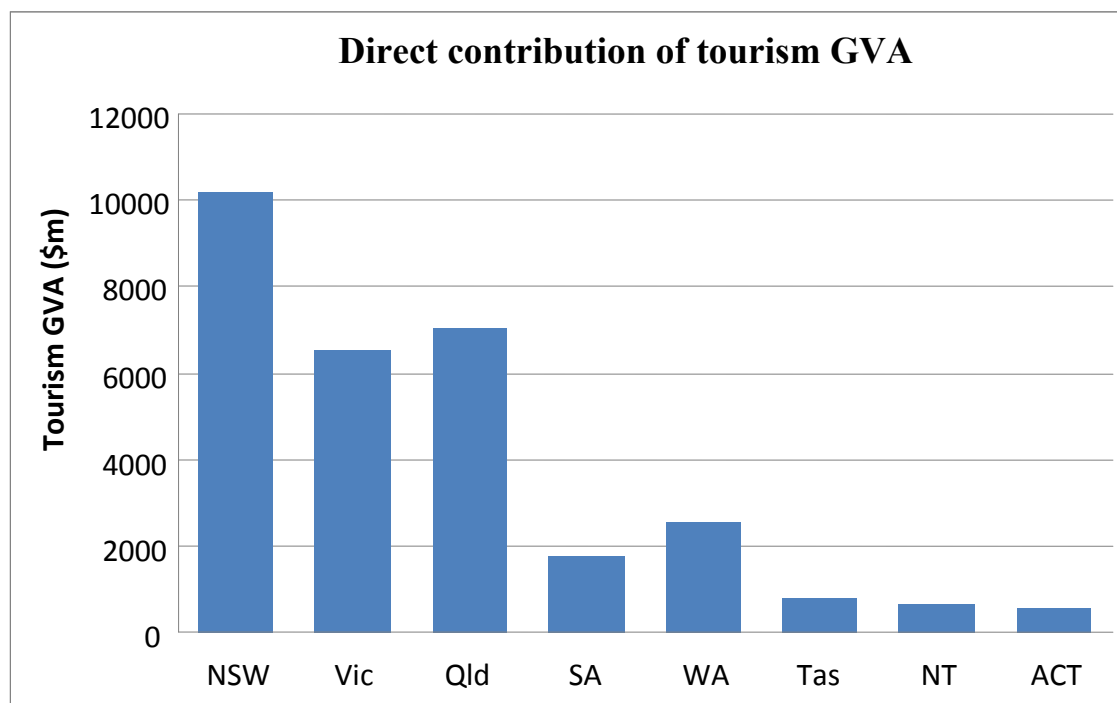
In 2008–09, total tourism consumption in Australia was \$92.0bn. In terms of direct economic contribution, this tourism consumption generated \$62.4bn of Australian industry output, \$30.0bn of industry GVA, \$32.8bn of GDP, and 486,200 jobs [source: ABS Tourism Satellite Account, 5249.0, 2008–09]⁸.

These direct contributions of tourism represent 2.6% of Australia's GVA, 2.6% of GDP, and 4.5% of total employment (see Table 1).

Table 1: Estimates of direct contribution of tourism by state and territory, 2008–09⁹

Direct contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	10198	6537	7032	1747	2526	775	642	556	30013
Tourism net taxes on products (\$m)	854	631	739	178	228	78	68	40	2816
Tourism GSP, GDP (\$m)	11052	7168	7770	1925	2754	853	710	596	32829
Tourism employment ('000)	160.3	106.5	118.0	29.6	39.7	13.2	10.4	8.3	486.2
Total GVA (\$m)	364991	265158	231795	71450	162990	21012	15155	24350	1156900
Tourism share of GVA (%)	2.8	2.5	3.0	2.4	1.5	3.7	4.2	2.3	2.6
Total GSP, GDP (\$m) ¹⁰	402334	291637	243901	78986	169950	23176	17168	25969	1253121
Tourism share of GSP, GDP (%)	2.7	2.5	3.2	2.4	1.6	3.7	4.1	2.3	2.6
Total employment ('000) ¹¹	3414.0	2682.8	2224.5	788.0	1166.4	233.8	115.3	196.0	10820.8
Tourism share of employment (%)	4.7	4.0	5.3	3.8	3.4	5.6	9.0	4.2	4.5

Figure 1: Direct contribution of state and territory tourism gross value added, 2008–09, \$m



⁸ Australian Bureau of Statistics 2010a

⁹ Two tables providing comparable information to Tables 1, 17 and 18 for the year 2006–07 and 2003–04 are attached at Appendix C.

¹⁰ Australian Bureau of Statistics 2009b

¹¹ Australian Bureau of Statistics 2009c

Figure 2: Direct contribution of tourism to state and territory net taxes on tourism products, 2008–09, \$m

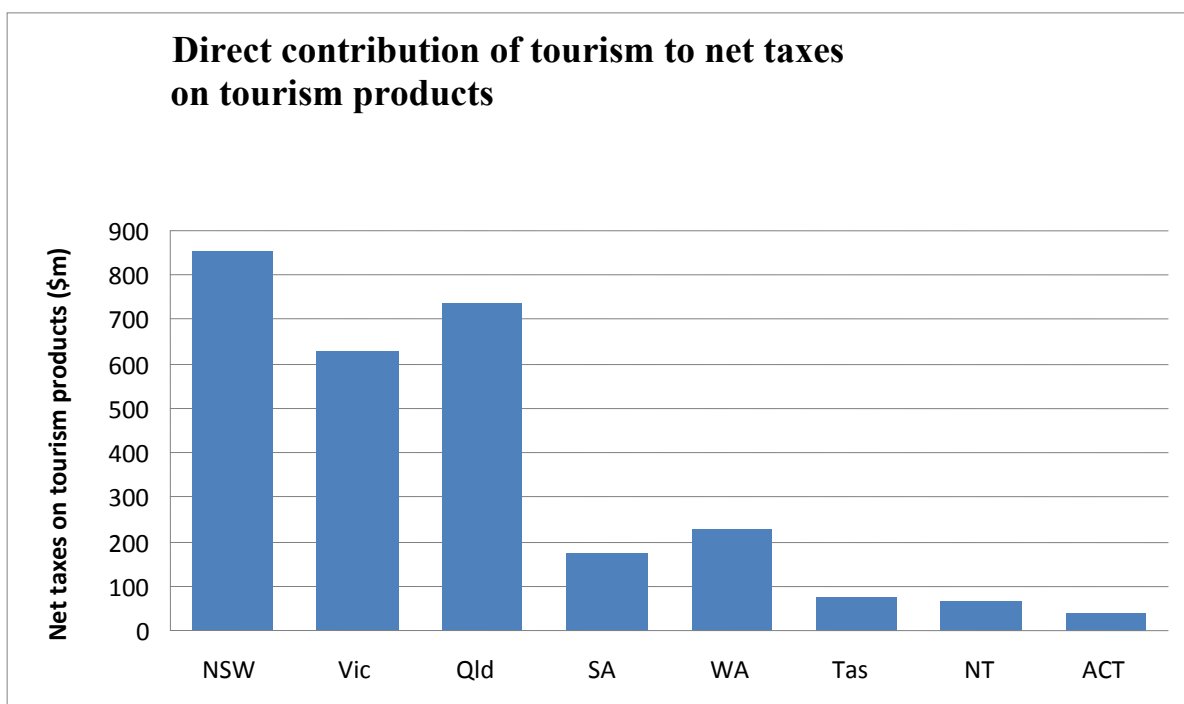


Figure 3: Direct contribution of state and territory tourism gross state product, 2008–09, \$m

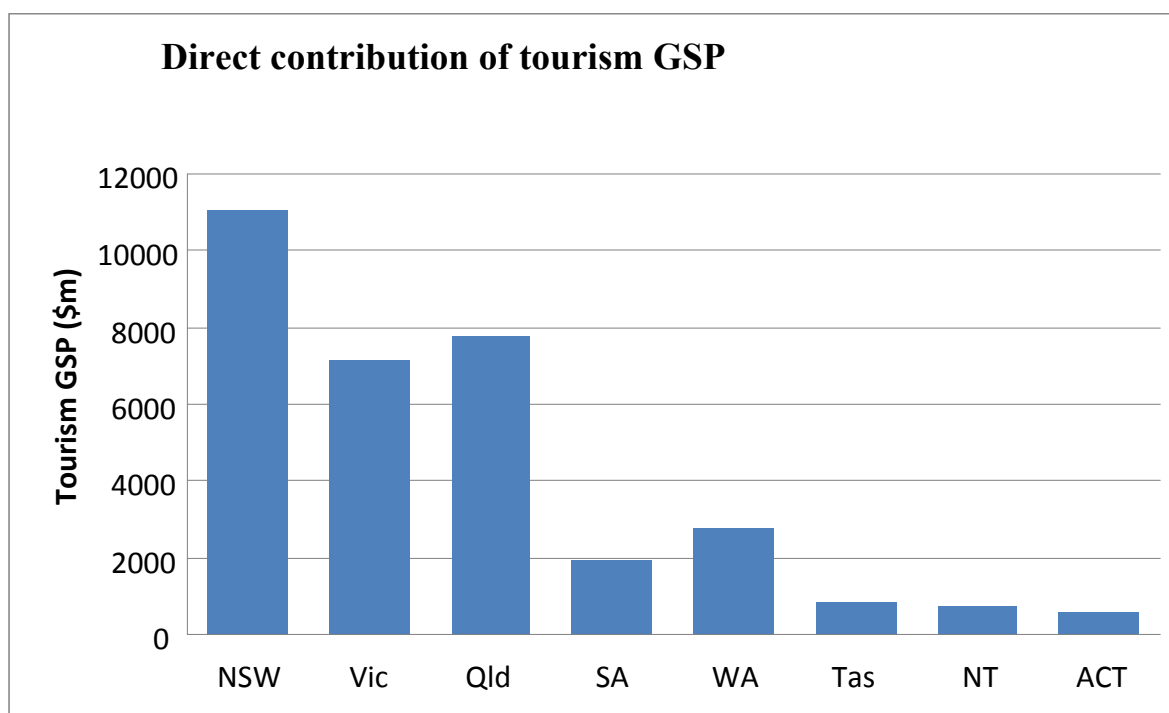


Figure 4: Direct contribution of state and territory tourism employment, 2008–09, '000

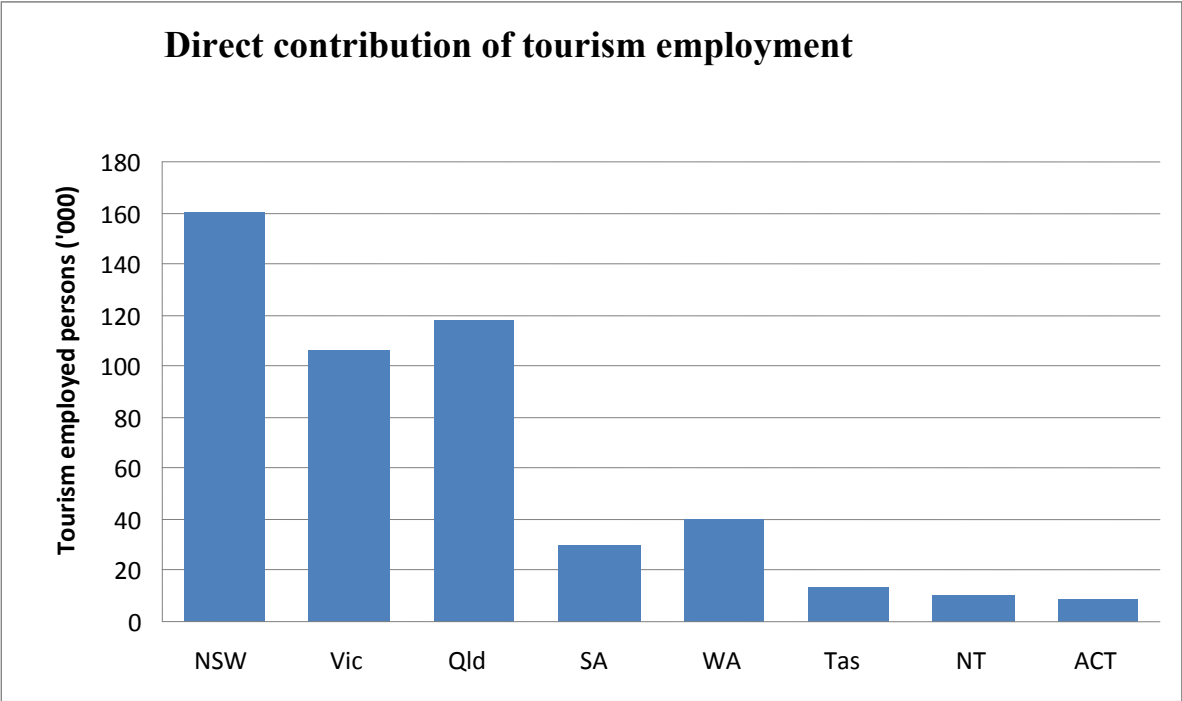


Figure 5: Share of tourism in state and territory gross industry value added, direct contribution, 2008–09, %

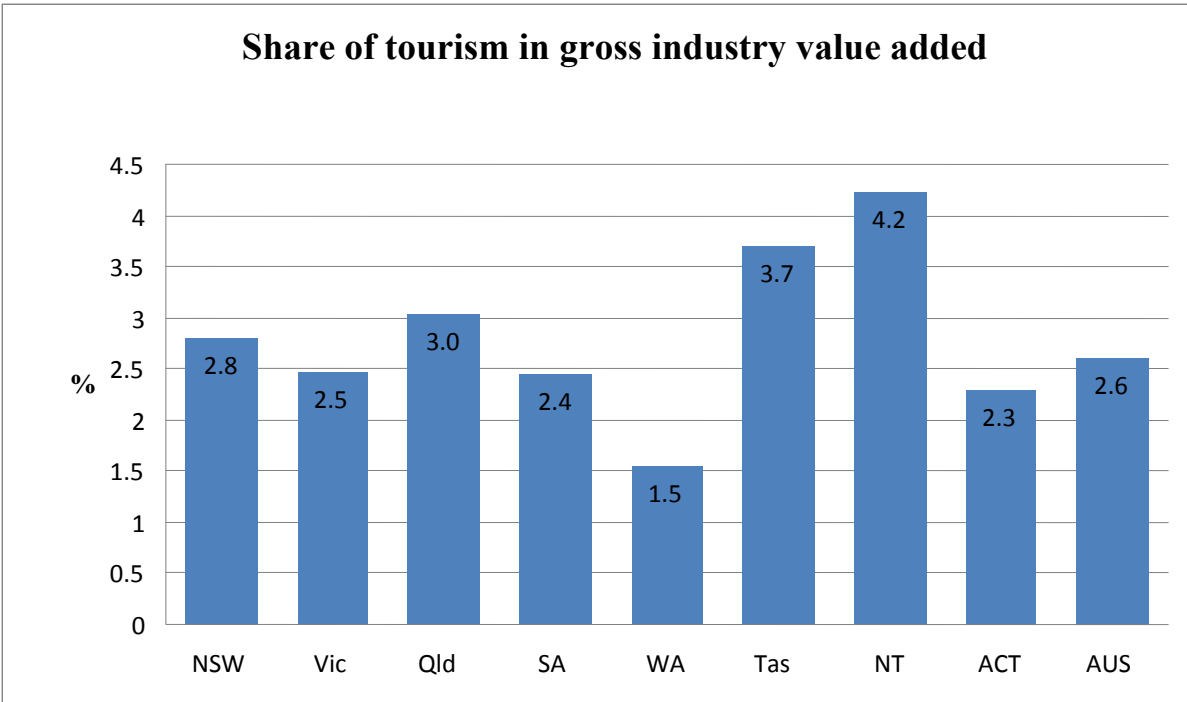


Figure 6: Share of tourism in GSP, direct contribution, 2008–09, %

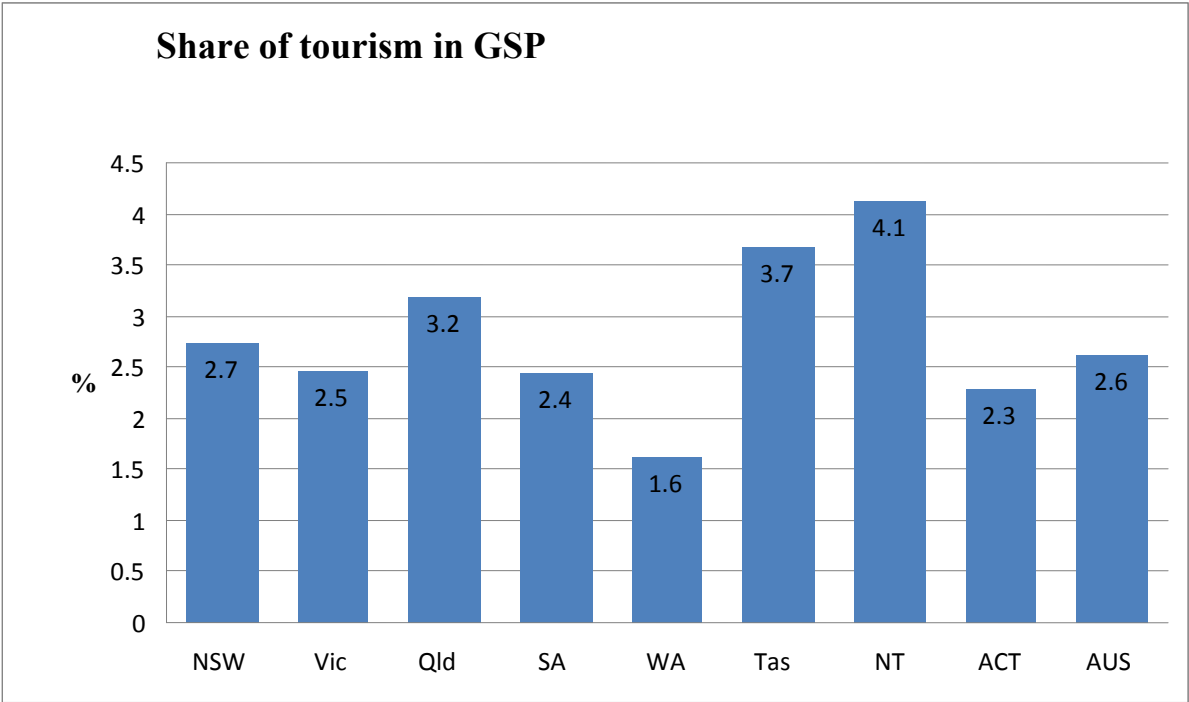
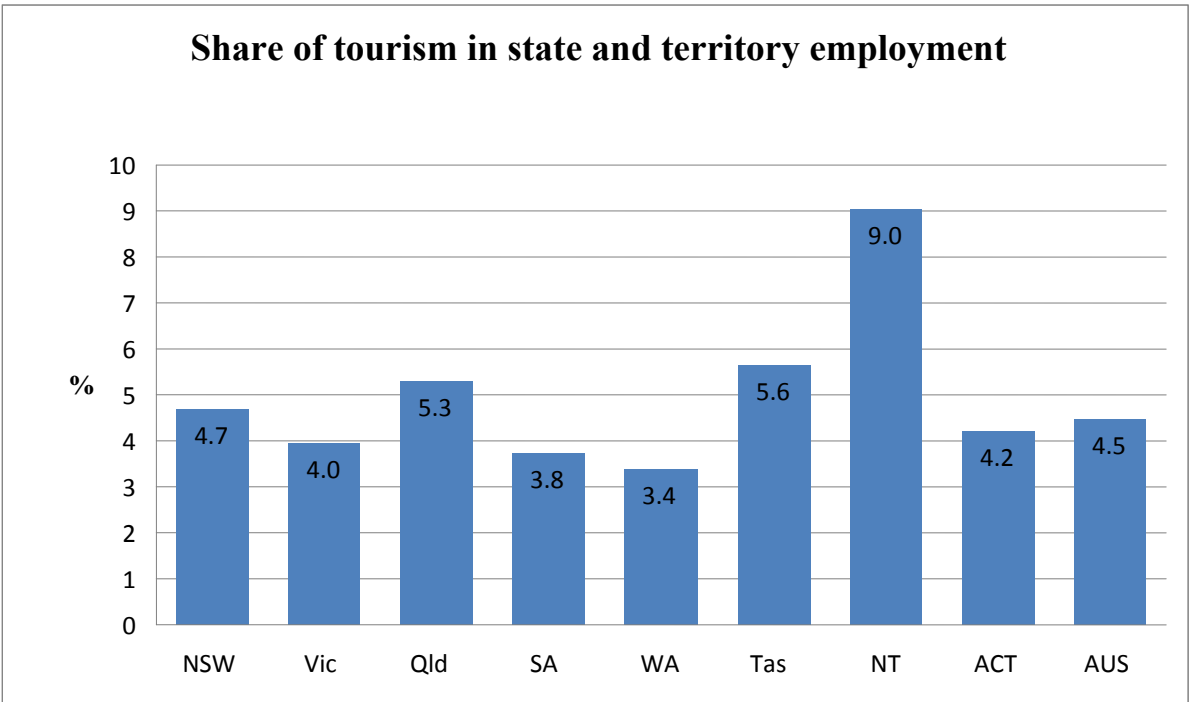


Figure 7: Share of tourism in state and territory employment, direct contribution, 2008–09, %



Tourism consumption

Tourism consumption is the total value of goods and services consumed by both resident and non-resident visitors within Australia (referred to as ‘internal consumption’ below). It includes consumption before and after the trip provided the expenditure is related to the trip, such as the purchase of luggage or photographic equipment.

Up to this point, tourism consumption equates closely to tourist expenditure as measured by TRA’s surveys, the IVS and NVS. However, also included in tourism consumption are imputed non-market transactions such as the estimated rental value of accommodation in self-owned holiday homes; the cost to households of food and alcohol in hosting visiting friends and relatives; and non-market services provided by governments, such as entry to museums and galleries.

Tourism consumption is measured in purchasers' prices (the price paid by the tourism consumer, which therefore includes taxes and subsidies).

In 2008–09, internal tourism consumption decreased by 1.0% to \$92.0bn.

Table 2: Tourism consumption by state and territory, 2008–09, \$m

Tourism products	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic products									
Accommodation services	3340	2064	2691	523	858	299	257	167	10198
Actual and imputed rent on dwellings	1056	711	734	205	305	82	53	81	3226
Takeaway and restaurant meals	4497	3040	3359	808	1086	385	265	216	13657
Taxi fares	256	143	170	38	63	39	20	12	740
Local area passenger transportation	236	151	145	28	40	20	10	8	638
Long distance passenger transportation	4059	2847	4047	908	1566	463	645	304	14837
Motor vehicle hire and lease	334	293	363	84	149	56	93	21	1392
Travel agency and tour operator services	892	464	642	275	218	88	62	45	2685
Recreational, cultural and sporting services	843	636	998	167	217	90	114	38	3103
Gambling and betting services	349	355	342	83	85	31	29	7	1282
<i>Total tourism characteristic products</i>	<i>15862</i>	<i>10704</i>	<i>13491</i>	<i>3117</i>	<i>4587</i>	<i>1551</i>	<i>1547</i>	<i>900</i>	<i>51758</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	3848	2906	3243	923	1025	337	223	210	12715
Food products	2347	1522	1878	439	664	197	199	109	7356
Alcoholic beverages and other beverages	1355	842	1081	263	383	115	111	52	4200
Motor vehicles, caravans, boats, etc	630	432	519	117	200	55	76	38	2067
Fuel (petrol, diesel)	2532	1665	1752	549	697	211	180	128	7714
Repair and maintenance of motor vehicles	129	62	114	43	33	8	11	11	411
Education services	1091	815	409	152	260	62	17	84	2890
<i>Total tourism connected products</i>	<i>11932</i>	<i>8244</i>	<i>8996</i>	<i>2486</i>	<i>3262</i>	<i>985</i>	<i>817</i>	<i>632</i>	<i>37353</i>
Other tourism goods and services	945	630	687	189	258	77	67	41	2894
Total	28739	19578	23174	5792	8107	2613	2430	1572	92005

Figure 8: Tourism consumption by state and territory, 2008–09, \$m

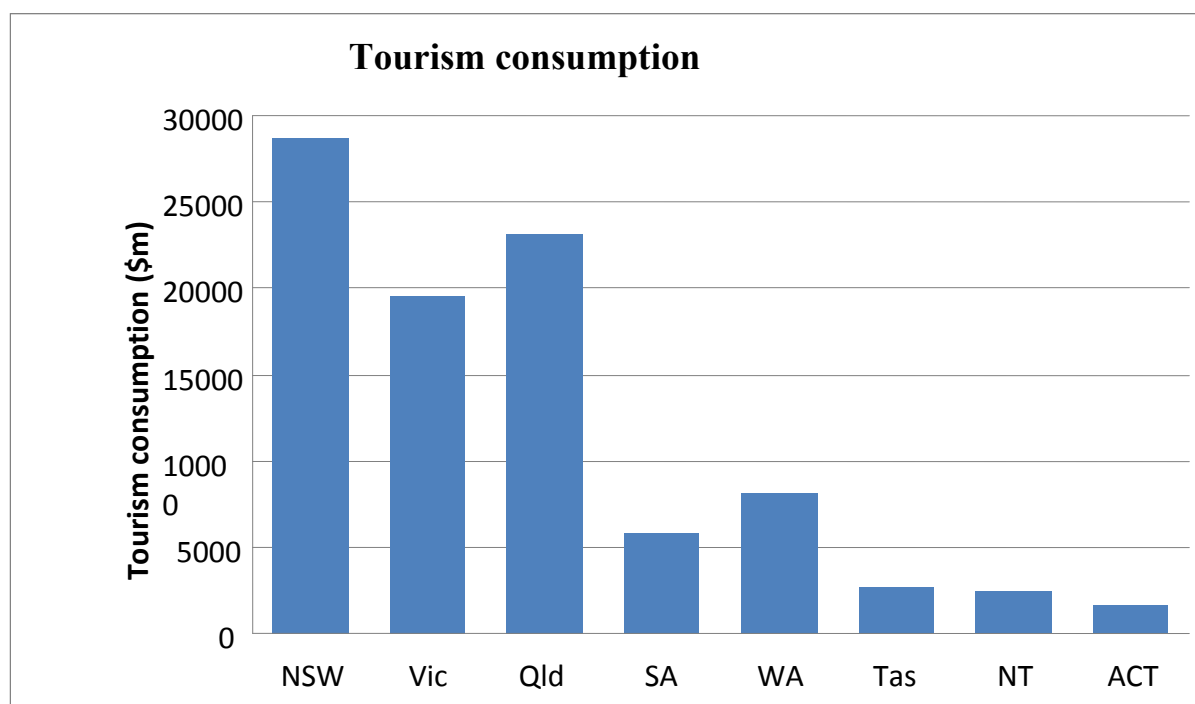


Table 3: Tourism consumption, 2008–09, share of Australia by state and territory, %

Tourism products	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic products									
Accommodation services	32.8	20.2	26.4	5.1	8.4	2.9	2.5	1.6	100
Actual and imputed rent on dwellings	32.7	22.0	22.8	6.3	9.5	2.5	1.6	2.5	100
Takeaway and restaurant meals	32.9	22.3	24.6	5.9	7.9	2.8	1.9	1.6	100
Taxi fares	34.6	19.3	23.0	5.1	8.5	5.2	2.6	1.7	100
Local area passenger transportation	37.0	23.7	22.8	4.3	6.2	3.1	1.6	1.3	100
Long distance passenger transportation	27.4	19.2	27.3	6.1	10.6	3.1	4.3	2.0	100
Motor vehicle hire and lease	24.0	21.1	26.1	6.0	10.7	4.0	6.6	1.5	100
Travel agency and tour operator services	33.2	17.3	23.9	10.3	8.1	3.3	2.3	1.7	100
Recreational, cultural and sporting services	27.2	20.5	32.2	5.4	7.0	2.9	3.7	1.2	100
Gambling and betting services	27.2	27.7	26.7	6.5	6.6	2.4	2.3	0.6	100
<i>Total tourism characteristic products</i>	<i>30.6</i>	<i>20.7</i>	<i>26.1</i>	<i>6.0</i>	<i>8.9</i>	<i>3.0</i>	<i>3.0</i>	<i>1.7</i>	<i>100</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	30.3	22.9	25.5	7.3	8.1	2.7	1.8	1.7	100
Food products	31.9	20.7	25.5	6.0	9.0	2.7	2.7	1.5	100
Alcoholic beverages and other beverages	32.3	20.1	25.7	6.3	9.1	2.7	2.6	1.2	100
Motor vehicles, caravans, boats, etc	30.5	20.9	25.1	5.7	9.7	2.7	3.7	1.8	100
Fuel (petrol, diesel)	32.8	21.6	22.7	7.1	9.0	2.7	2.3	1.7	100
Repair and maintenance of motor vehicles	31.3	15.1	27.6	10.5	8.1	2.0	2.7	2.7	100
Education services	37.8	28.2	14.2	5.3	9.0	2.1	0.6	2.9	100
<i>Total tourism connected products</i>	<i>31.9</i>	<i>22.1</i>	<i>24.1</i>	<i>6.7</i>	<i>8.7</i>	<i>2.6</i>	<i>2.2</i>	<i>1.7</i>	<i>100</i>
Other tourism goods and services	32.7	21.8	23.8	6.5	8.9	2.7	2.3	1.4	100
Total	31.2	21.3	25.2	6.3	8.8	2.8	2.6	1.7	100

Tourism industry output

Direct tourism output is equal to internal tourism consumption at basic prices less the cost to retailers of domestic goods sold directly to visitors. In 2008–09, direct tourism output decreased by 1.3% to \$62.4bn (see Table 4).

Tourism industry output measures the value of goods and services produced by establishments to satisfy visitor consumption, excluding net taxes on tourism products (taxes less subsidies). When producing tourism goods and services, Australian businesses use goods and services produced and supplied by other businesses.

The new international standards require that only the retail margin contributes to direct tourism output, value added and GDP. This is because it is deemed that only the retailer has a direct relationship with the visitor and is therefore part of the tourism industry. Consequently, the output (and value added) attributed to these other industries which supply products for sale through the retail industry (e.g. industries involved in the production of clothing, food and beverages, and souvenirs for sale to visitors through retail operators) has been excluded from direct tourism output.

Because output is valued at basic prices, product taxes such as the Goods and Services Tax (GST) and import tariffs have been excluded and subsidies included – this is collectively referred to as net taxes. In 2008–09, net taxes on tourism products decreased by 1.7% to \$2.8bn (see Table 1).

Table 4: Tourism output by state and territory, 2008–09, \$m

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	3454	2135	2783	541	888	309	266	172	10547
Ownership of dwellings	1056	711	734	205	305	82	53	81	3226
Cafes, restaurants and takeaway food services	3167	2141	2366	569	765	271	187	152	9617
Clubs, pubs, taverns and bars	843	570	630	152	204	72	50	41	2561
Rail transport	342	219	211	40	58	0	15	0	885
Taxi transport	244	136	162	36	60	37	19	12	704
Other road transport	479	307	295	56	81	40	21	17	1296
Air, water and other transport	5497	2676	2623	537	1155	218	296	324	13325
Motor vehicle hiring	273	239	296	69	122	46	76	17	1137
Travel agency and tour operator services	793	412	570	245	194	78	55	40	2387
Cultural services	284	214	336	56	73	30	39	13	1045
Casinos and other gambling services	97	99	95	23	24	9	8	2	357
Other sports and recreation services	453	342	536	90	117	48	61	21	1667
<i>Total tourism characteristic industries</i>	16983	10201	11637	2617	4043	1239	1143	892	48754
Tourism connected industries									
Automotive fuel retailing	197	130	137	43	54	16	14	10	601
Other retail trade	2073	1565	1746	497	552	182	120	113	6848
Education and training	1145	855	430	160	273	65	18	88	3033
<i>Total tourism connected industries</i>	3415	2550	2312	699	879	263	152	211	10482
All other industries	1042	695	757	208	284	85	73	45	3189
Direct tourism output, at basic prices	21439	13445	14707	3524	5207	1587	1369	1147	62425

Figure 9: Tourism output by state and territory, 2008–09, \$m

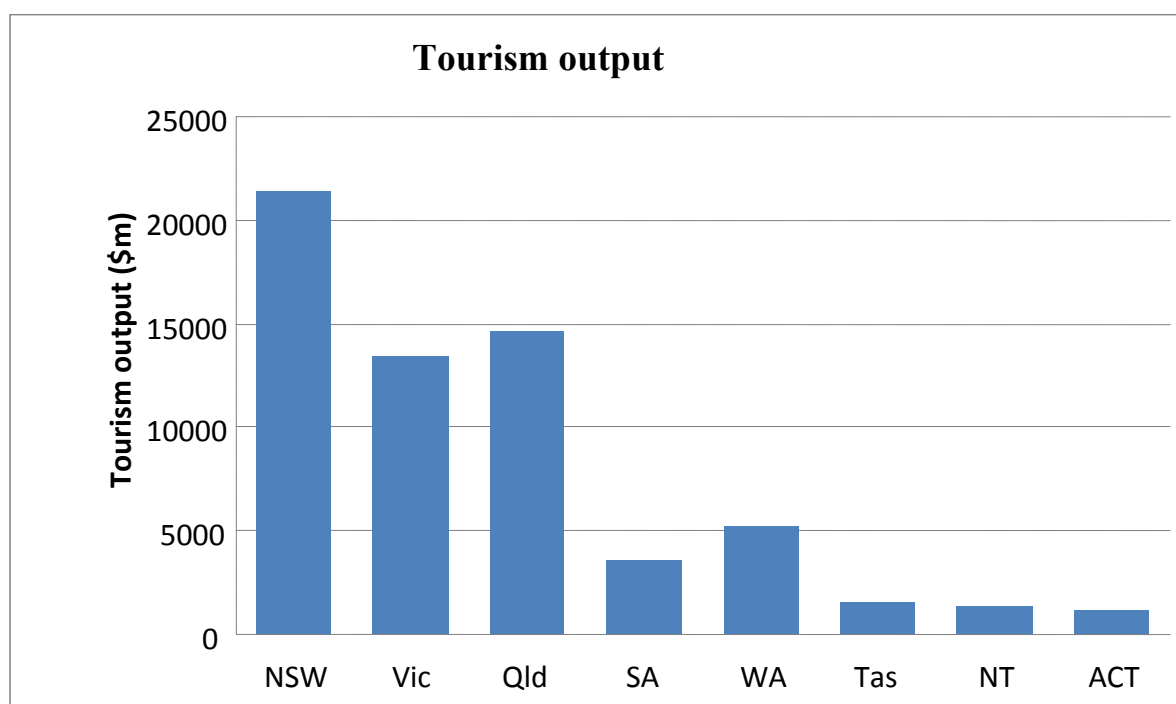


Table 5: Tourism output, 2008–09, share by state and territory, %

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	32.8	20.2	26.4	5.1	8.4	2.9	2.5	1.6	100
Ownership of dwellings	32.7	22.0	22.8	6.3	9.5	2.5	1.6	2.5	100
Cafes, restaurants and takeaway food services	32.9	22.3	24.6	5.9	7.9	2.8	1.9	1.6	100
Clubs, pubs, taverns and bars	32.9	22.3	24.6	5.9	7.9	2.8	1.9	1.6	100
Rail transport	38.7	24.8	23.8	4.5	6.5	0.0	1.7	0.0	100
Taxi transport	34.6	19.3	23.0	5.1	8.5	5.2	2.6	1.7	100
Other road transport	37.0	23.7	22.8	4.3	6.2	3.1	1.6	1.3	100
Air, water and other transport	41.3	20.1	19.7	4.0	8.7	1.6	2.2	2.4	100
Motor vehicle hiring	24.0	21.1	26.1	6.0	10.7	4.0	6.6	1.5	100
Travel agency and tour operator services	33.2	17.3	23.9	10.3	8.1	3.3	2.3	1.7	100
Cultural services	27.2	20.5	32.2	5.4	7.0	2.9	3.7	1.2	100
Casinos and other gambling services	27.2	27.7	26.7	6.5	6.6	2.4	2.3	0.6	100
Other sports and recreation services	27.2	20.5	32.2	5.4	7.0	2.9	3.7	1.2	100
<i>Total tourism characteristic industries</i>	34.8	20.9	23.9	5.4	8.3	2.5	2.3	1.8	100
Tourism connected industries									
Automotive fuel retailing	32.8	21.6	22.7	7.1	9.0	2.7	2.3	1.7	100
Other retail trade	30.3	22.9	25.5	7.3	8.1	2.7	1.8	1.7	100
Education and training	37.8	28.2	14.2	5.3	9.0	2.1	0.6	2.9	100
<i>Total tourism connected industries</i>	32.6	24.3	22.1	6.7	8.4	2.5	1.5	2.0	100
All other industries	32.7	21.8	23.8	6.5	8.9	2.7	2.3	1.4	100
Direct tourism output, at basic prices	34.3	21.5	23.6	5.6	8.3	2.5	2.2	1.8	100

Tourism industry GVA

Tourism industry GVA represents the total basic value (before taxes and subsidies) of Australian produced goods and services consumed by all visitors (international, interstate, intrastate, and outbound) after deducting the cost of goods and services used in the process of production. Because it excludes the distorting effects of taxes and subsidies, tourism GVA equates to tourism GSP at factor cost (i.e. GSP less net taxes).

GVA is often considered the most accurate way of measuring the contribution of an industry to the economy.

In 2008–09, tourism GVA was \$30.0bn or 2.6% of Australia’s total GVA. This was down 0.3% from 2007–08 (see Table 6 and, for comparison with previous years, see Chapter 4).

Table 6: Tourism GVA by state and territory, direct contribution, 2008–09, \$m

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	1742	1077	1404	273	448	156	134	87	5320
Ownership of dwellings	778	524	541	151	225	60	39	60	2378
Cafes, restaurants and takeaway food services	1099	743	821	197	265	94	65	53	3337
Clubs, pubs, taverns and bars	411	278	307	74	99	35	24	20	1247
Rail transport	175	112	108	20	30	0	8	0	452
Taxi transport	121	67	81	18	30	18	9	6	350
Other road transport	202	129	124	24	34	17	9	7	546
Air, water and other transport	1940	944	926	190	408	77	104	115	4703
Motor vehicle hiring	157	138	170	39	70	26	43	10	654
Travel agency and tour operator services	480	250	345	148	117	47	34	24	1445
Cultural services	122	92	144	24	31	13	17	6	449
Casinos and other gambling services	54	55	53	13	13	5	5	1	200
Other sports and recreation services	137	104	163	27	35	15	19	6	506
<i>Total tourism characteristic industries</i>	7419	4513	5187	1198	1806	563	508	394	21587
Tourism connected industries									
Automotive fuel retailing	54	35	37	12	15	4	4	3	163
Other retail trade	1155	873	973	277	308	101	67	63	3817
Education and training	872	651	327	121	208	50	14	67	2309
<i>Total tourism connected industries</i>	2081	1559	1337	410	530	155	84	133	6289
All other industries	698	466	508	139	191	57	49	30	2137
Total direct TGVA, at basic prices	10198	6537	7032	1747	2527	776	642	556	30013

Figure 10: Tourism GVA, by state and territory, direct contribution, 2008–09, \$m

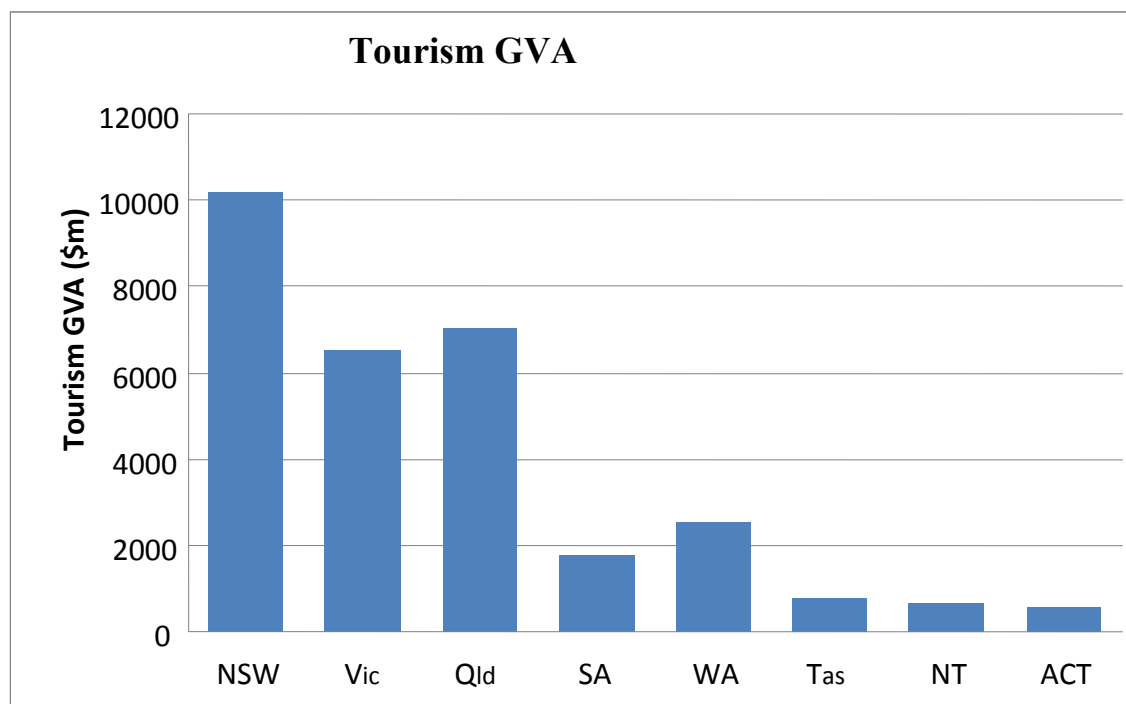


Table 7: Tourism GVA, share by state and territory, direct contribution, 2008–09, %

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	32.8	20.2	26.4	5.1	8.4	2.9	2.5	1.6	100
Ownership of dwellings	32.7	22.0	22.8	6.3	9.5	2.5	1.6	2.5	100
Cafes, restaurants and takeaway food services	32.9	22.3	24.6	5.9	7.9	2.8	1.9	1.6	100
Clubs, pubs, taverns and bars	32.9	22.3	24.6	5.9	7.9	2.8	1.9	1.6	100
Rail transport	38.7	24.8	23.8	4.5	6.5	0.0	1.7	0.0	100
Taxi transport	34.6	19.3	23.0	5.1	8.5	5.2	2.6	1.7	100
Other road transport	37.0	23.7	22.8	4.3	6.2	3.1	1.6	1.3	100
Air, water and other transport	41.3	20.1	19.7	4.0	8.7	1.6	2.2	2.4	100
Motor vehicle hiring	24.0	21.1	26.1	6.0	10.7	4.0	6.6	1.5	100
Travel agency and tour operator services	33.2	17.3	23.9	10.3	8.1	3.3	2.3	1.7	100
Cultural services	27.2	20.5	32.2	5.4	7.0	2.9	3.7	1.2	100
Casinos and other gambling services	27.2	27.7	26.7	6.5	6.6	2.4	2.3	0.6	100
Other sports and recreation services	27.2	20.5	32.2	5.4	7.0	2.9	3.7	1.2	100
<i>Total tourism characteristic industries</i>	34.4	20.9	24.0	5.5	8.4	2.6	2.4	1.8	100
Tourism connected industries									
Automotive fuel retailing	32.8	21.6	22.7	7.1	9.0	2.7	2.3	1.7	100
Other retail trade	30.3	22.9	25.5	7.3	8.1	2.7	1.8	1.7	100
Education and training	37.8	28.2	14.2	5.3	9.0	2.1	0.6	2.9	100
<i>Total tourism connected industries</i>	33.1	24.8	21.3	6.5	8.4	2.5	1.3	2.1	100
All other industries	32.7	21.8	23.8	6.5	8.9	2.7	2.3	1.4	100
Total direct tourism GVA, at basic prices	34.0	21.8	23.4	5.8	8.4	2.6	2.1	1.9	100

Table 8: Tourism GVA by ANZSIC industry division and by state and territory, direct contribution, 2008–09, \$m and % share

(Provides information on tourism GVA by traditional ANZSIC industries by state and territory in 2008–09.)

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Direct tourism GVA (\$m)									
Agriculture, forestry and fishing	0	0	0	0	0	0	0	0	0
Mining	0	0	0	0	0	0	0	0	0
Manufacturing	0	0	0	0	0	0	0	0	0
Electricity, gas, water and waste services	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0
Wholesale trade	0	0	0	0	0	0	0	0	0
Retail trade	1208	907	1010	289	322	106	71	66	3979
Accommodation and food services	3252	2097	2531	544	812	285	223	160	9903
Transport, postal and warehousing	2588	1387	1404	290	569	138	173	137	6686
Information media and telecommunications	160	97	116	39	42	14	11	7	486
Financial and insurance services	20	12	15	5	5	2	1	1	61
Rental, hiring and real estate services (a)	225	137	163	55	59	20	16	10	684
Professional, scientific and technical services	1	1	1	0	0	0	0	0	4
Administrative and support services	531	323	385	130	139	47	37	24	1616
Public administration and safety	0	0	0	0	0	0	0	0	0
Education and training	872	651	327	121	208	50	14	67	2309
Health care and social assistance	179	109	130	44	47	16	13	8	545
Arts and recreation services	314	251	361	64	80	32	40	13	1155
Other services	67	41	49	16	18	6	5	3	204
Ownership of dwellings	778	524	541	151	225	60	39	60	2378
Total direct tourism GVA, at basic prices (\$m)	10198	6537	7032	1747	2527	776	642	556	30013
	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Total industry GVA (b) (\$m)									
Agriculture, forestry and fishing	4728	7069	6898	3245	6003	1281	315	12	29551
Mining	10947	4977	26764	2178	41076	369	3146	26	89482
Manufacturing	34483	30135	19657	8899	12193	2567	948	290	109173
Electricity, gas, water and waste services	9095	6649	5888	2319	3462	900	369	600	29281
Construction	22643	16739	19398	4841	17110	1244	1707	2107	85789
Wholesale trade	18042	16185	11657	3380	6194	733	261	515	56966
Retail trade	16121	13550	12462	3539	6152	1200	485	796	54305
Accommodation and food services	10170	5701	6716	1965	2366	622	395	522	28457
Transport, postal and warehousing	21297	13882	15401	4071	9388	1435	873	620	66968
Information media and telecommunications	15990	11217	5524	2247	2662	588	260	667	39155
Financial and insurance services	56993	34110	15281	6256	7986	1926	666	1397	124615
Rental, hiring and real estate services (a)	11371	8563	7080	1752	4912	395	336	657	35065
Professional, scientific and technical services	25748	18319	11528	3748	8237	534	526	1732	70371
Administrative and support services	11200	8310	4906	1558	3858	377	238	494	30941
Public administration and safety	17549	9387	13099	4080	5413	1460	1586	8756	61331
Education and training	15789	13782	9390	3307	4929	1198	549	1241	50185
Health care and social assistance	20932	17123	14544	5573	7879	1978	905	1411	70346
Arts and recreation services	3463	2648	1416	636	931	148	156	393	9790
Other services	7544	5264	4943	1654	2586	359	266	494	23110
Ownership of dwellings	30885	21547	19244	6202	9652	1699	1170	1619	92019
Total industry GVA, at basic prices (\$m)	364991	265158	231795	71450	162990	21012	15155	24350	1156900

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism share of industry GVA (d) (%)									
Agriculture, forestry and fishing	0	0	0	0	0	0	0	0	0
Mining	0	0	0	0	0	0	0	0	0
Manufacturing	0	0	0	0	0	0	0	0	0
Electricity, gas, water and waste services	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0
Wholesale trade	0	0	0	0	0	0	0	0	0
Retail trade	7.5	6.7	8.1	8.2	5.2	8.8	14.6	8.3	7.3
Accommodation and food services	32.0	36.8	37.7	27.7	34.3	45.8	56.5	30.6	34.8
Transport, postal and warehousing	12.2	10.0	9.1	7.1	6.1	9.6	19.8	22.1	10.0
Information media and telecommunications	1.0	0.9	2.1	1.7	1.6	2.4	4.3	1.1	1.2
Financial and insurance services	0.0	0.0	0.1	0.1	0.1	0.1	0.2	0.1	0.0
Rental, hiring and real estate services (a)	2.0	1.6	2.3	3.1	1.2	5.0	4.7	1.6	2.0
Professional, scientific and technical services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Administrative and support services	4.7	3.9	7.8	8.3	3.6	12.4	15.6	4.9	5.2
Public administration and safety	0	0	0	0	0	0	0	0	0
Education and training	5.5	4.7	3.5	3.7	4.2	4.1	2.5	5.4	4.6
Health care and social assistance	0.9	0.6	0.9	0.8	0.6	0.8	1.4	0.6	0.8
Arts and recreation services	9.1	9.5	25.5	10.1	8.6	22.0	25.5	3.3	11.8
Other services	0.9	0.8	1.0	1.0	0.7	1.6	1.8	0.6	0.9
Ownership of dwellings	2.5	2.4	2.8	2.4	2.3	3.5	3.3	3.7	2.6
Total (%)	2.8	2.5	3.0	2.4	1.5	3.7	4.2	2.3	2.6

Tourism industry employment

The TSA defines tourism employment in terms of tourism employed persons. This is derived by multiplying the number of employed persons in each industry by the proportion of total output of that industry which is related to tourism.

An employed person is someone aged 15 years or over who, during the reference week of the relevant Labour Force Survey, worked for one hour or more for pay, profit, commission or payment in-kind in a job or business.

Information to allow further sub-division of tourism employment by category, e.g. into permanent, part-time, casual, full-time equivalent, or by gender is not currently available, although it may be the subject of future development work by the ABS and TRA.

In 2008–09, tourism directly employed 486,200 people or 4.5% of total employment, down 0.3% from 2007–08 (see Table 9).

Table 9: Tourism employment by state and territory, direct contribution, 2008–09, '000

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic and connected industries									
Accommodation	22.3	13.8	17.9	3.5	5.7	2.0	1.7	1.1	68.0
Cafes, restaurants and takeaway food services	40.6	27.5	30.4	7.3	9.8	3.5	2.4	2.0	123.4
Clubs, pubs, taverns and bars	7.6	5.1	5.7	1.4	1.8	0.7	0.4	0.4	23.1
Rail transport	1.6	1.0	1.0	0.2	0.3	0.0	0.1	0.0	4.2
Road transport and transport equipment rental	6.8	4.7	5.1	1.1	1.8	0.8	0.8	0.3	21.4
Air, water and other transport	14.6	7.1	7.0	1.4	3.1	0.6	0.8	0.9	35.5
Travel agency and tour operator services	9.3	4.8	6.7	2.9	2.3	0.9	0.6	0.5	28.0
Cultural services	2.5	1.9	2.9	0.5	0.6	0.3	0.3	0.1	9.1
Casinos and other gambling services	0.6	0.6	0.6	0.1	0.2	0.1	0.1	0.0	2.3
Other sports and recreation services	5.2	3.9	6.2	1.0	1.3	0.6	0.7	0.2	19.2
Retail trade	29.5	22.0	24.5	7.0	7.9	2.6	1.7	1.6	96.9
Education and training	11.9	8.9	4.5	1.7	2.8	0.7	0.2	0.9	31.6
Total tourism characteristic and connected industries	152.5	101.3	112.5	28.1	37.6	12.8	9.8	8.0	462.7
All other industries	7.6	5.1	5.6	1.5	2.1	0.6	0.5	0.3	23.4
Total tourism employed persons (a)	160.3	106.5	118.0	29.6	39.7	13.2	10.4	8.3	486.2
Total employed persons (b)	3414.0	2682.8	2224.5	788.0	1166.4	233.8	115.3	196.0	10820.8
Tourism industry share of total employed persons (%)	4.7	4.0	5.3	3.8	3.4	5.6	9.0	4.2	4.5

Figure 11: Tourism employment, by state and territory, direct contribution, 2008–09, '000

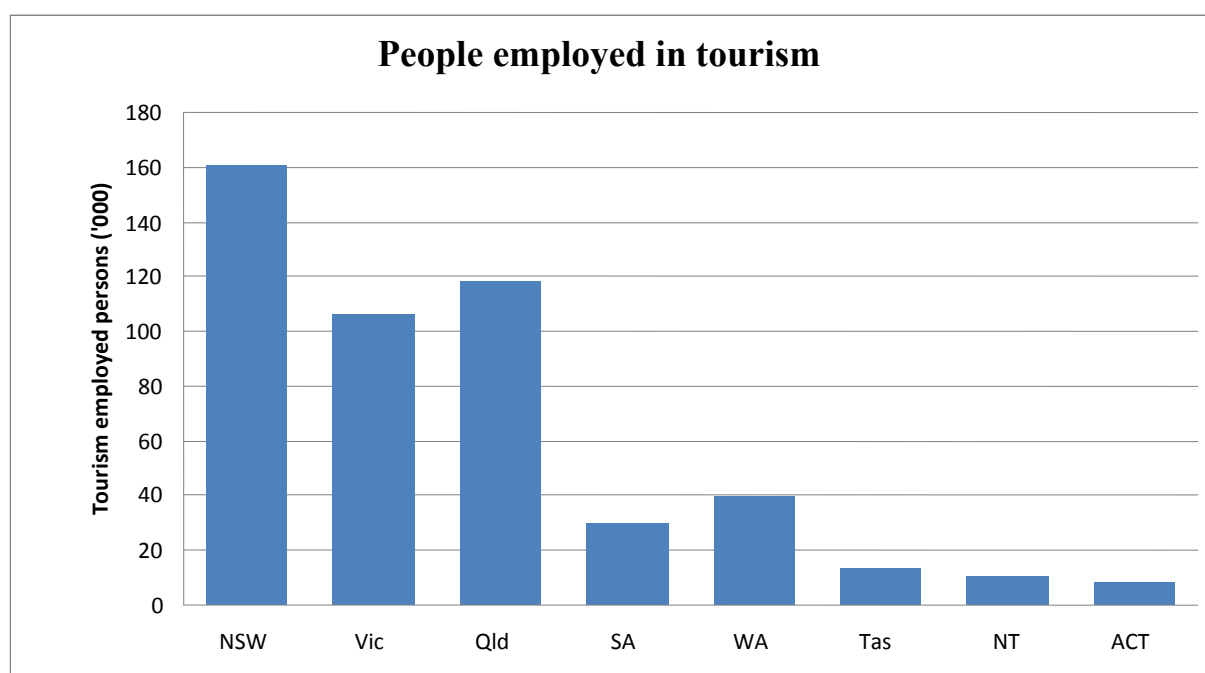


Table 10: Tourism employment, share by state and territory, direct contribution, 2008–09, %

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic and connected industries									
Accommodation	32.8	20.2	26.4	5.1	8.4	2.9	2.5	1.6	100
Cafes, restaurants and takeaway food services	32.9	22.3	24.6	5.9	7.9	2.8	1.9	1.6	100
Clubs, pubs, taverns and bars	32.9	22.3	24.6	5.9	7.9	2.8	1.9	1.6	100
Rail transport	38.7	24.8	23.8	4.5	6.5	0.0	1.7	0.0	100
Road transport and transport equipment rental	31.8	21.7	24.0	5.1	8.4	3.9	3.7	1.5	100
Air, water and other transport	41.3	20.1	19.7	4.0	8.7	1.6	2.2	2.4	100
Travel agency and tour operator services	33.2	17.3	23.9	10.3	8.1	3.3	2.3	1.7	100
Cultural services	27.2	20.5	32.2	5.4	7.0	2.9	3.7	1.2	100
Casinos and other gambling services	27.2	27.7	26.7	6.5	6.6	2.4	2.3	0.6	100
Other sports and recreation services	27.2	20.5	32.2	5.4	7.0	2.9	3.7	1.2	100
Retail trade	30.5	22.8	25.3	7.2	8.1	2.7	1.8	1.7	100
Education and training	37.8	28.2	14.2	5.3	9.0	2.1	0.6	2.9	100
Total tourism characteristic and connected industries	33.0	21.9	24.3	6.1	8.1	2.8	2.1	1.7	100
All other industries	32.7	21.8	23.8	6.5	8.9	2.7	2.3	1.4	100
Total tourism employed persons	33.0	21.9	24.3	6.1	8.2	2.7	2.1	1.7	100

Table 11: Tourism employment by ANZSIC industry division and by state and territory, direct contribution, 2008–09, '000 and % share

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Direct tourism employment ('000)									
Agriculture, forestry and fishing	0	0	0	0	0	0	0	0	0
Mining	0	0	0	0	0	0	0	0	0
Manufacturing	0	0	0	0	0	0	0	0	0
Electricity, gas, water and waste services	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0
Wholesale trade	0	0	0	0	0	0	0	0	0
Retail trade	29.5	22.0	24.5	7.0	7.9	2.6	1.7	1.6	96.9
Accommodation and food services	70.5	46.4	54.0	12.2	17.4	6.1	4.6	3.4	214.5
Transport, postal and warehousing	23.1	12.8	13.1	2.7	5.1	1.4	1.6	1.2	61.1
Information media and telecommunications	2.3	1.3	1.7	0.6	0.6	0.2	0.2	0.1	6.9
Financial and insurance services	0.3	0.2	0.2	0.1	0.1	0.0	0.0	0.0	0.9
Rental, hiring and real estate services (a)	3.2	1.9	2.3	0.8	0.8	0.3	0.2	0.2	9.8
Professional, scientific and technical services	0	0	0	0	0	0	0	0	0
Administrative and support services	7.6	4.5	5.5	2.0	2.0	0.7	0.5	0.4	23.1
Public administration and safety	0	0	0	0	0	0	0	0	0
Education and training	11.9	8.9	4.5	1.7	2.8	0.7	0.2	0.9	31.6
Health care and social assistance	2.6	1.5	1.9	0.7	0.7	0.2	0.2	0.1	7.8
Arts and recreation services	8.3	6.4	9.7	1.7	2.1	0.9	1.1	0.4	30.6
Other services	1.0	0.6	0.7	0.2	0.2	0.1	0.1	0.0	2.9
Total tourism employed persons (b) ('000)	160.3	106.5	118.0	29.6	39.7	13.2	10.4	8.3	486.1
	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Total industry employment (c) ('000)									
Agriculture, forestry and fishing	91.3	84.9	81.9	40.4	42.4	15.6	2.5	0.6	359.5
Mining	31.3	10.5	43.8	8.3	63.4	2.6	3.9	0.0	163.8
Manufacturing	306.7	315.4	190.9	89.5	100.3	20.5	4.6	4.0	1031.7
Electricity, gas, water and waste services	36.8	30.8	27.3	10.9	16.7	3.5	1.5	1.3	128.9
Construction	294.5	225.9	241.7	60.2	125.2	19.6	10.8	13.5	991.5
Wholesale trade	132.6	121.4	71.4	28.7	40.0	8.5	2.4	2.7	407.6
Retail trade	383.1	294.5	261.7	89.9	130.0	27.7	11.8	15.9	1214.6
Accommodation and food services	246.1	168.2	159.1	48.1	66.6	16.9	7.1	10.9	723.0
Transport, postal and warehousing	188.3	137.6	134.9	35.7	59.4	10.2	6.3	5.5	577.9
Information media and telecommunications	83.9	65.0	34.9	11.9	15.3	3.7	2.2	4.8	221.6
Financial and insurance services	169.8	103.3	59.0	24.5	29.8	6.1	2.2	4.5	399.1
Rental, hiring and real estate services (a)	55.9	42.8	53.3	12.0	21.9	3.3	2.1	2.4	193.7
Professional, scientific and technical services	277.6	208.0	143.0	46.6	76.6	11.5	5.4	22.0	790.6
Administrative and support services	108.2	91.9	69.6	27.8	37.6	6.2	3.6	4.4	349.4
Public administration and safety	198.5	119.1	129.6	48.8	68.5	19.2	18.2	57.0	658.8
Education and training	244.6	207.8	165.6	58.8	87.4	18.8	10.6	17.6	811.2
Health care and social assistance	362.9	288.4	226.8	100.9	115.9	28.2	11.8	17.4	1152.3
Arts and recreation services	56.7	59.4	35.1	12.2	20.2	4.2	3.1	4.4	195.3
Other services	145.1	108.2	95.0	32.7	49.2	7.8	5.2	7.2	450.4
Total employed persons (c) ('000)	3414.0	2682.8	2224.5	788.0	1166.4	233.8	115.3	196.0	10820.8

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism share of industry employment (%)									
Agriculture, forestry and fishing	0	0	0	0	0	0	0	0	0
Mining	0	0	0	0	0	0	0	0	0
Manufacturing	0	0	0	0	0	0	0	0	0
Electricity, gas, water and waste services	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0
Wholesale trade	0	0	0	0	0	0	0	0	0
Retail trade	7.7	7.5	9.4	7.8	6.1	9.3	14.7	10.1	8.0
Accommodation and food services	28.7	27.6	33.9	25.3	26.1	36.2	64.1	31.5	29.7
Transport, postal and warehousing	12.2	9.3	9.7	7.6	8.7	13.9	26.2	21.3	10.6
Information media and telecommunications	2.7	2.1	4.7	5.0	3.8	5.7	7.4	2.2	3.1
Financial and insurance services	0.2	0.2	0.4	0.3	0.2	0.4	0.9	0.3	0.2
Rental, hiring and real estate services (a)	5.8	4.4	4.4	7.0	3.8	8.9	11.0	6.3	5.0
Professional, scientific and technical services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Administrative and support services	7.0	4.9	7.9	7.1	5.2	11.2	14.7	8.0	6.6
Public administration and safety	0	0	0	0	0	0	0	0	0
Education and training	4.9	4.3	2.7	2.8	3.3	3.6	1.8	5.2	3.9
Health care and social assistance	0.7	0.5	0.8	0.7	0.6	0.8	1.5	0.7	0.7
Arts and recreation services	14.7	10.8	27.7	13.7	10.5	20.9	35.5	8.3	15.7
Other services	0.7	0.5	0.7	0.8	0.5	1.1	1.3	0.6	0.6
Total (%)	4.7	4.0	5.3	3.8	3.4	5.6	9.0	4.2	4.5

Chapter 3

Indirect and total economic contribution

Estimating the indirect contribution of tourism

The international TSA standards, as set out in RMF:TSA 2008, apply only to the measurement of the direct economic contributions of tourism. Australia's ATSA is similarly based on this approach. This reflects the need for consistency with other components of the System of National Accounts (SNA). It also allows comparison between the contribution of tourism to GVA, GSP, employment and other economic measures against those of other industries within the economy. Inclusion of indirect contributions in the TSA would invalidate such comparisons across industries because of the extensive double counting that would result.

For some purposes, however, it is useful to examine the indirect—or flow-on—effects of tourism demand across the economy more generally. This is achieved by measuring the supply of goods and services produced by non-tourism industries to satisfy the demand of industries directly supplying tourism demand.

Estimates of tourism's indirect and total (direct plus indirect) contribution to the Australian economy in 2008–09 are provided in Tables 12 and 13.

Revisions introduced in 2008–09

The estimates in Tables 12 and 13 depend for their base data sets on the ATSA estimates of tourism's direct contribution to the economy and on input-output tables for the Australian economy. Both of these data sets underwent significant change for the 2008–09 estimates.

In the case of the data from the 2008–09 ATSA, changes arose as a result of the use of revised supply-use tables by the ABS, the implementation of the RMF:TSA 2008 revisions referred to in Chapter 1 of this report, revisions to the input series and a review of TSA methods leading to revisions to the entire TSA series. These revisions have had significant effects including, for example, on the distribution of components of retail services between direct and indirect contribution and on the tourism contribution of education.

In addition to these revisions introduced by the ABS, for this report a change in the source of input-output data was made from use of the severely dated 2001–02 input-output tables which were available from the ABS to the data derived from the Monash University Centre for Policy Studies' MMR4 model which is based on 2005 data.

Both of these changes will have had significant effects on the estimates of tourism's indirect contribution provided in Tables 12 and 13.

In particular, the estimates of indirect GVA and GSP and employment provided in tables 12 and 13 are significantly higher under the new analysis than those in previous years. This relates partly to the use of a higher tourism multiplier associated with the new input-output data set, but mainly to the shift of some areas of manufacturing, agriculture, oil refining and wholesale and transport activity out of direct and into indirect tourism contribution following the introduction of RMF:TSA2008.

When direct and indirect are combined to give total contribution (Table 13), GVA and GSP estimates remain relatively stable compared with the 2007–08 results – although with a lower share of the Australian economy as a whole which was growing more strongly during the period than the tourism sector.

Given the significance of these changes to the underlying data, direct comparisons between the 2008–09 indirect and total contribution with the estimates for previous years which were published in the STCRC state and territory TSA reports have the potential to be highly misleading and should be treated with very considerable caution.

Indirect economic contribution of tourism

It is estimated that tourism consumption in 2008–09 produced an indirect economic contribution of \$33.6bn on Australia's industry GVA, \$37.4bn on its GDP, and 403,000 jobs. The indirect economic contribution of tourism on GVA, GDP and employment represents, respectively, 2.9% of Australian GVA, 3.0% of GDP and 3.7% of total employment.

For Australia, the indirect economic contribution of tourism on GVA, GDP and employment represents 53% of total (direct plus indirect) tourism GVA, 53% of total tourism GDP and 45% of total tourism employment.

Table 12: Estimates of indirect contribution of tourism by state and territory, 2008–09

Indirect contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	11267	7222	8168	1875	2855	867	761	603	33619
Tourism net taxes on products (\$m)	1139	858	1018	232	310	102	92	53	3805
Tourism GSP, GDP (\$m)	12407	8080	9187	2107	3166	969	853	656	37424
Tourism employment ('000)	129.0	86.7	102.3	24.1	33.6	11.3	9.4	6.7	403.0
Total GVA (\$m)	364991	265158	231795	71450	162990	21012	15155	24350	1156900
Tourism share of GVA (%)	3.1	2.7	3.5	2.6	1.8	4.1	5.0	2.5	2.9
Total GSP, GDP (\$m)	402334	291637	243901	78986	169950	23176	17168	25969	1253121
Tourism share of GSP, GDP (%)	3.1	2.8	3.8	2.7	1.9	4.2	5.0	2.5	3.0
Total employment ('000)	3414.0	2682.8	2224.5	788.0	1166.4	233.8	115.3	196.0	10820.8
Tourism share of employment (%)	3.8	3.2	4.6	3.1	2.9	4.8	8.1	3.4	3.7

Total economic contribution of tourism

By adding the direct and indirect contribution of tourism, it is estimated that tourism consumption in 2008–09 produced a total economic contribution of \$63.6bn on Australia's industry GVA, \$70.3bn on its GDP, and 889,000 jobs.

The total (direct plus indirect) economic contribution of tourism in GVA, GDP and employment represents, respectively, 5.5% of Australian GVA, 5.6% of GDP and 8.2% of total employment.

Table 13: Estimates of total (direct plus indirect) contribution of tourism by state and territory, 2008–09

Total contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	21465	13759	15200	3622	5382	1643	1403	1159	63632
Tourism net taxes on products (\$m)	1993	1489	1757	410	538	180	160	94	6621
Tourism GSP, GDP (\$m)	23458	15248	16957	4032	5920	1823	1563	1252	70253
Tourism employment ('000)	289.3	193.2	220.3	53.7	73.3	24.5	19.8	15.0	889.0
Total GVA (\$m)	364991	265158	231795	71450	162990	21012	15155	24350	1156900
Tourism share of GVA (%)	5.9	5.2	6.6	5.1	3.3	7.8	9.3	4.8	5.5
Total GSP, GDP (\$m)	402334	291637	243901	78986	169950	23176	17168	25969	1253121
Tourism share of GSP, GDP (%)	5.8	5.2	7.0	5.1	3.5	7.9	9.1	4.8	5.6
Total employment ('000)	3414.0	2682.8	2224.5	788.0	1166.4	233.8	115.3	196.0	10820.8
Tourism share of employment (%)	8.5	7.2	9.9	6.8	6.3	10.5	17.2	7.7	8.2

Figure 12: Direct and indirect contribution of state and territory tourism GSP, 2008-09, \$m

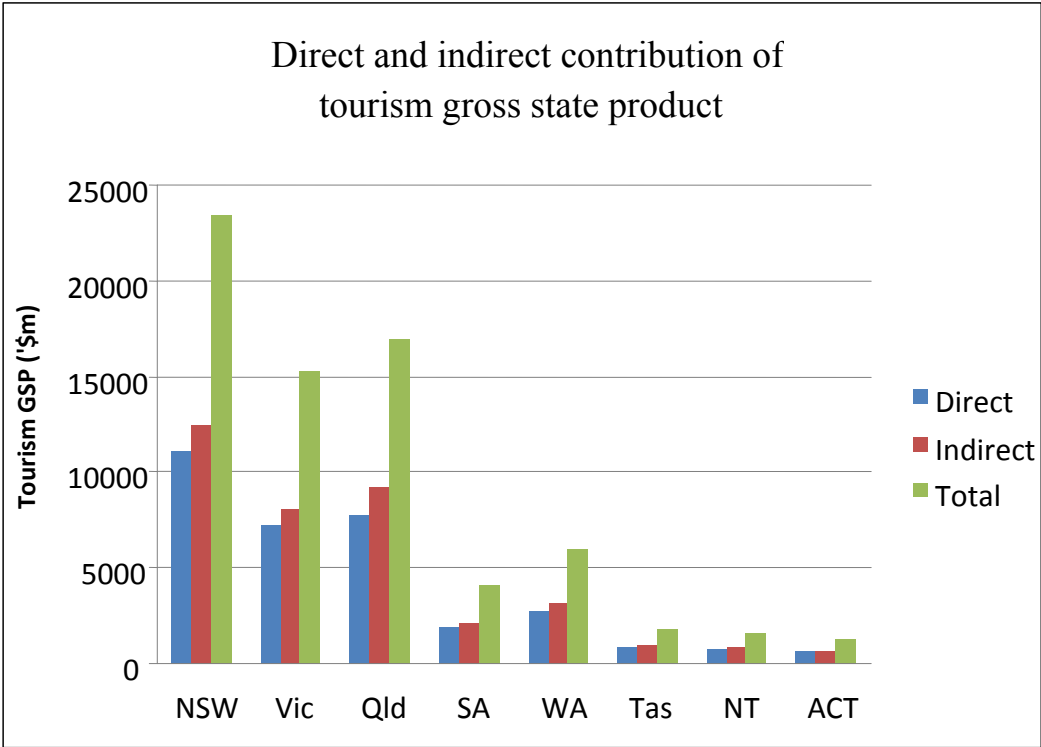
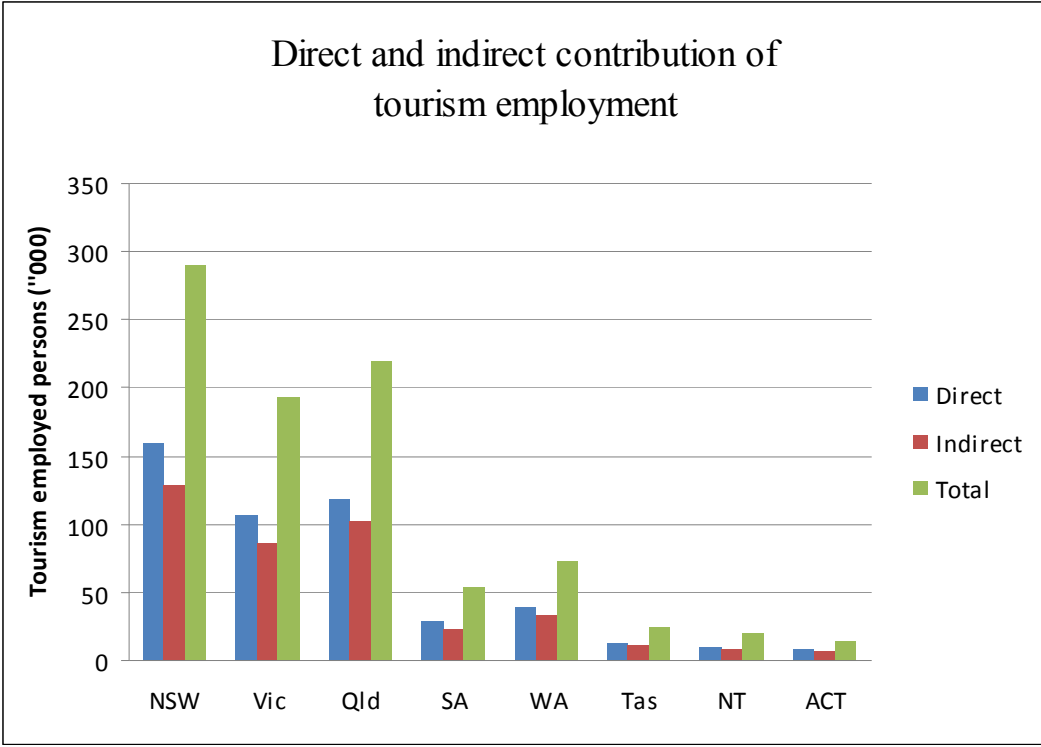


Figure 13: Direct and indirect contribution of state and territory tourism employment, 2008-09, 000



Chapter 4

Comparison of direct contribution with previous years

Direct contribution of tourism GSP and GVA

The method and data sources adopted in developing the estimates used in this report are broadly the same as those used in the state and territory TSA reports for 2003–04, 2006–07 and 2007–08 produced by the STCRC. However, there have been several changes, which mean that comparisons between the TSA results for different years need to be approached cautiously.

The ABS only fully revises the ATSA every three years. This is then regarded as a benchmark year against which estimates for the following two intermediate years are developed, using a combination of actual data and extrapolation from the benchmark.

The method for compiling benchmark estimates involves the use of fully balanced supply and use tables that underlie the national accounts. The latest available industry data in respect of tourism related industries is then incorporated.

Since the ATSA was first produced in October 2000, revisions to the input series and reviews of TSA methods carried out during the benchmark years have brought about several revisions to the entire TSA series. Until the next TSA benchmark is applied, ATSA estimates for the following two years draw on the benchmark relationships updated to reflect the annual demand data sets from TRA.

As a result, comparisons between ATSA data based on different benchmark years can incorporate different source data and estimation techniques. Significant changes have occurred in the past from one benchmark series to the next, particularly with respect to exclusion of the value added produced by the manufacture of goods such as food and beverages, clothing and souvenirs from estimates of tourism's direct economic contribution.

In addition, problems of comparability between different TSA years can also arise due to sampling error at the data collection stage. This is more likely where smaller area data is involved, e.g. for the territories and smaller states, and as the data is broken down by industry sub-category. Therefore, TSA estimates at the level of specific tourism industry sectors, and for smaller states or territories, contain a greater risk of error and should be treated with caution.

The substantial revisions to the benchmark data introduced by the ABS in its 2008–09 ATSA present special problems in comparing the 2008–09 estimates with those provided in state and territory TSA reports. Therefore, the following tables incorporate a back casting of the 2008–09 key TSA estimates to show the equivalent state and territory TSA estimates from the STCRC reports for 2003–04, 2006–07, and 2007–08. These estimates have been adjusted to incorporate the ABS' revisions. Back cast estimates for the years 2004–05 and 2005–06 are also included for comparison purposes.

Table 14 provides back cast estimates of tourism's direct contribution to GDP and GSP over the five year period 2003–04 to 2007–08. In broad terms, these show that the share of direct contribution of tourism in Australia's GDP has decreased, from 3.1% in 2003–04 to 2.9% in 2004–05 and 2005–06, 2.8% in 2006–07 and 2007–08 and 2.6% in 2008–09. This reflects the slower rate of growth experienced by tourism over the period, relative to a number of other important industries and to the economy as a whole. The effect has been that despite having grown significantly over the period, in nominal terms, the share of tourism in the economy as a whole has declined.

Table 14: Estimates of direct contribution of tourism GSP by state and territory, 2003–04 to 2008–09¹²

Tourism GSP, GDP		NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
2003–04	\$m	9267	5283	6219	1621	2413	729	597	432	26561
	% share of tourism in total GSP, GDP	3.1	2.5	4.1	2.8	2.5	4.8	6.0	2.4	3.1
2004–05	\$m	9528	5438	6355	1658	2463	749	611	443	27244
	% share of tourism in total GSP, GDP	3.2	2.5	3.7	2.7	2.0	4.0	4.8	2.3	2.9
2005–06	\$m	10005	5883	6465	1539	2630	740	739	546	28546
	% share of tourism in total GSP, GDP	3.1	2.5	3.5	2.3	1.9	3.7	5.3	2.6	2.9
2006–07	\$m	10869	6391	7023	1671	2858	804	803	593	31012
	% share of tourism in total GSP, GDP	3.1	2.5	3.4	2.3	1.9	3.7	5.3	2.6	2.8
2007–08	\$m	11521	6623	7627	1750	3102	839	871	630	32963
	% share of tourism in total GSP, GDP	3.1	2.4	3.4	2.3	1.9	3.8	5.3	2.6	2.8
2008–09	\$m	11052	7168	7770	1925	2754	853	710	596	32829
	% share of tourism in total GSP, GDP	2.7	2.5	3.2	2.4	1.6	3.7	4.1	2.3	2.6

The state and territory TSA results show that during the same reference years, shares of the direct contribution of tourism to GSP in Queensland, South Australia, Western Australia, and the Northern Territory also decreased in accord with the national trend. A significant contributor to this is most likely strong growth in minerals production, accompanied by associated growth in their overall economies. This contributed to a decrease of the tourism share in the overall economy.

Shares of the direct contribution of tourism to GSP in New South Wales rose from 3.1% in 2003–04 to 3.2% in 2004–05, returning to 3.1% in 2005–06, 2006–07 and 2007–08, before falling to 2.7% in 2008–09.

Victoria remained mainly unchanged at 2.5% for most of the period with a slight dip to 2.4% in 2007–08. In the case of the Australian Capital Territory, the direct contribution of tourism in GSP decreased slightly from 2.4% in 2003–04 to 2.3% in 2004–05. It increased to 2.6% in 2005–06 and 2007–08, before falling to 2.3% in 2008–09.

Tasmania, by comparison, suffered a sharp drop between 2003–04 and 2005–06, but remained relatively stable since.

¹² The figures for tourism GSP 2003–04 to 2007–08 in Table 20 have been back cast to follow the latest tourism GDP figures in the ATSA 2008–09

Figure 14: Direct contribution of state and territory tourism GSP, 2003–04 to 2008–09, \$m

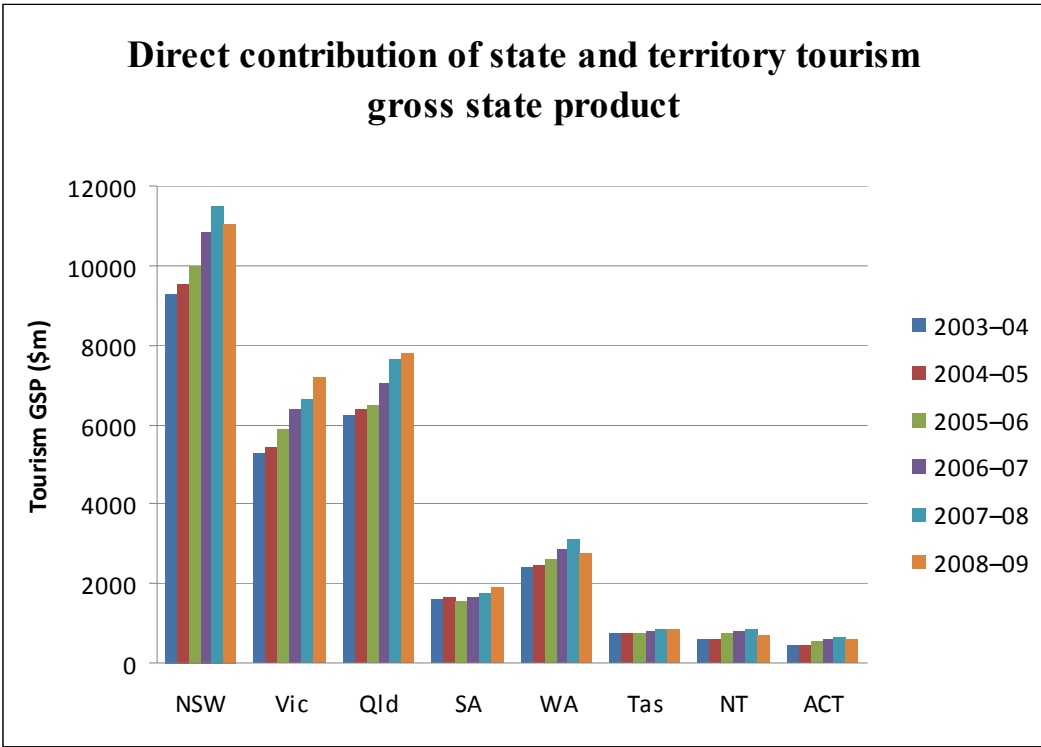


Figure 15: Share of tourism in GSP, direct contribution, 2003–04 to 2008–09, %

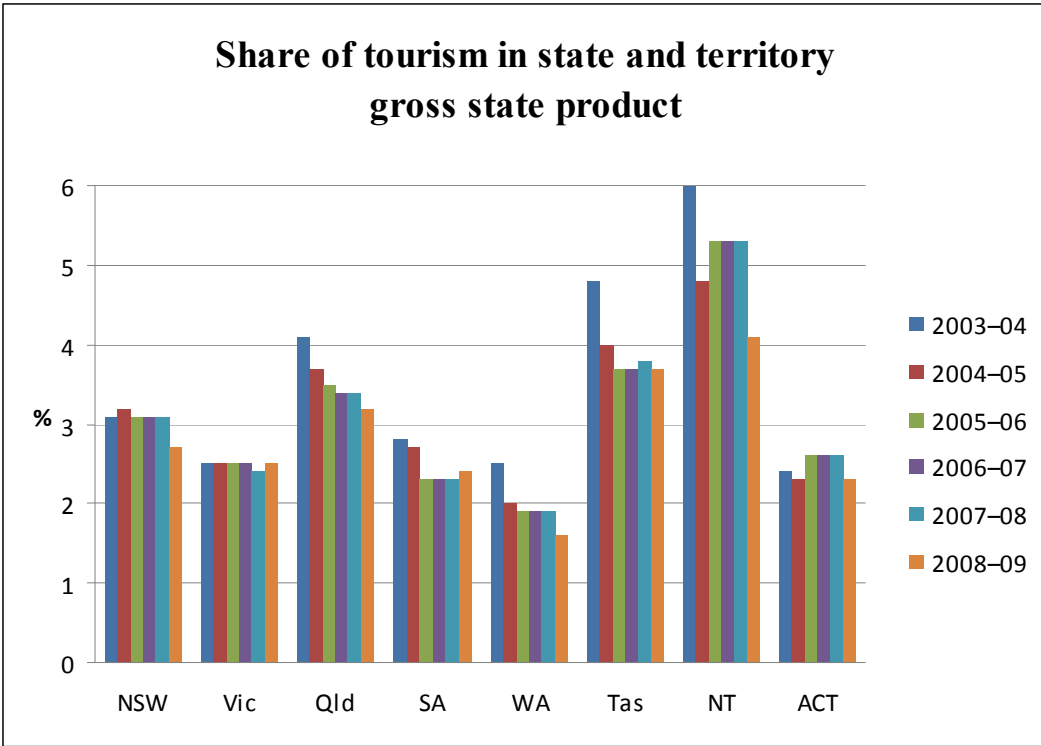


Table 15: Estimates of direct contribution of tourism GVA by state and territory, 2003–04 to 2008–09

Tourism GVA		NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
2003–04	\$m	8459.8	4822.4	5677.3	1479.6	2202.4	665.61	545.27	394.62	24247
	% share of tourism in total GVA	3.1	2.4	4.2	2.8	2.5	4.7	5.8	2.3	3.1
2004–05	\$m	8691.1	4960.2	5796.6	1512.2	2246.2	683.22	557.17	404.21	24851
	% share of tourism in total GVA	3.0	2.3	3.9	2.5	2.5	4.2	5.0	2.4	2.9
2005–06	\$m	9147.7	5378.8	5910.9	1406.7	2405	676.82	675.76	499.27	26101
	% share of tourism in total GVA	3.1	2.4	3.4	2.3	2.0	3.8	5.3	2.6	2.8
2006–07	\$m	9942.2	5846	6424.3	1528.9	2613.9	735.6	734.46	542.64	28368
	% share of tourism in total GVA	3.1	2.4	3.4	2.3	2.0	3.8	5.2	2.6	2.8
2007–08	\$m	10520	6047.2	6964	1598.3	2832.2	765.71	795.35	575.69	30098
	% share of tourism in total GVA	3.0	2.4	3.3	2.4	1.8	4.0	5.1	2.5	2.8
2008–09	\$m	10198	6537	7032	1747	2526	775	642	556	30013
	% share of tourism in total GVA	2.8	2.5	3.0	2.4	1.5	3.7	4.2	2.3	2.6

Direct contribution of tourism employment

The direct contribution of tourism employment for Australia has shown a slow but steady decline from 4.8% in 2003–04, to 4.5% in 2008–09 (see Table 16). This reflects the effects of slower growth in tourism during the period relative to many other industries and relative to the economy as a whole.

As total employment in the economy grows at a higher rate than tourism, the tourism share of total employment has declined. Growth in the economy as a whole has also contributed to a tightening labour market, which forces increases in labour productivity on industries such as tourism.

This trend has been broadly reflected in the individual states and territories:

- New South Wales – employment has remained relatively stable at around 4.6% to 4.7% of total NSW jobs.
- Victoria and South Australia – the direct contribution of tourism in employment decreased slightly between the years 2003–04 and 2006–07, but strengthened in 2008–09.
- Queensland – the direct contribution of tourism employment was fairly stable up until a slight decline in 2008–09.
- Tasmania, the Northern Territory, and the Australian Capital Territory – the direct contribution of tourism employment decreased at varying rates.
- Western Australia – the direct contribution of tourism employment declined from 4.8% to 4.0% in 2007–08 before dipping to 3.4% in 2008–09. This most likely reflects the strong growth in non-tourism industries, particularly the minerals sector in WA. This minerals sector driven growth has been responsible for not only a larger economy—and therefore total level of employment with consequences for the tourism share of that total—but it has also generated strong competition for labour between industries including tourism.

Table 16: Estimates of direct contribution of tourism employment by state and territory, 2003–04 to 2008–09

Tourism employment		NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
2003–04	'000	146.88	93.986	109.99	28.381	47.546	15.201	12.225	8.2895	462.5
	% share of tourism in employment	4.6	4.0	5.9	4.0	4.9	7.2	12.8	4.7	4.8
2004–05	'000	149.85	95.697	112.03	28.939	48.435	15.503	12.576	8.4646	471.5
	% share of tourism in employment	4.6	3.9	5.9	3.9	4.8	7.2	12.8	4.7	4.8
2005–06	'000	154.91	96.062	121.79	27.324	44.119	13.7	9.6944	7.6002	475.2
	% share of tourism in employment	4.7	3.8	6.0	3.6	4.1	6.1	9.8	4.2	4.7
2006–07	'000	154.25	96.17	121.98	27.387	44.188	13.791	9.7045	7.632	475.1
	% share of tourism in employment	4.6	3.7	5.8	3.6	4.0	6.1	9.4	4.0	4.6
2007–08	'000	158.1	98.493	125.39	28.045	45.33	14.271	10.084	7.889	487.6
	% share of tourism in employment	4.6	3.7	5.8	3.6	4.0	6.1	9.2	4.1	4.6
2008–09	'000	160.3	106.5	118.0	29.6	39.7	13.2	10.4	8.3	486.1
	% share of tourism in employment	4.7	4.0	5.3	3.8	3.4	5.6	9.0	4.2	4.5

Figure 16: Tourism employment, by state and territory, direct contribution, 2003–04 to 2008–09, '000

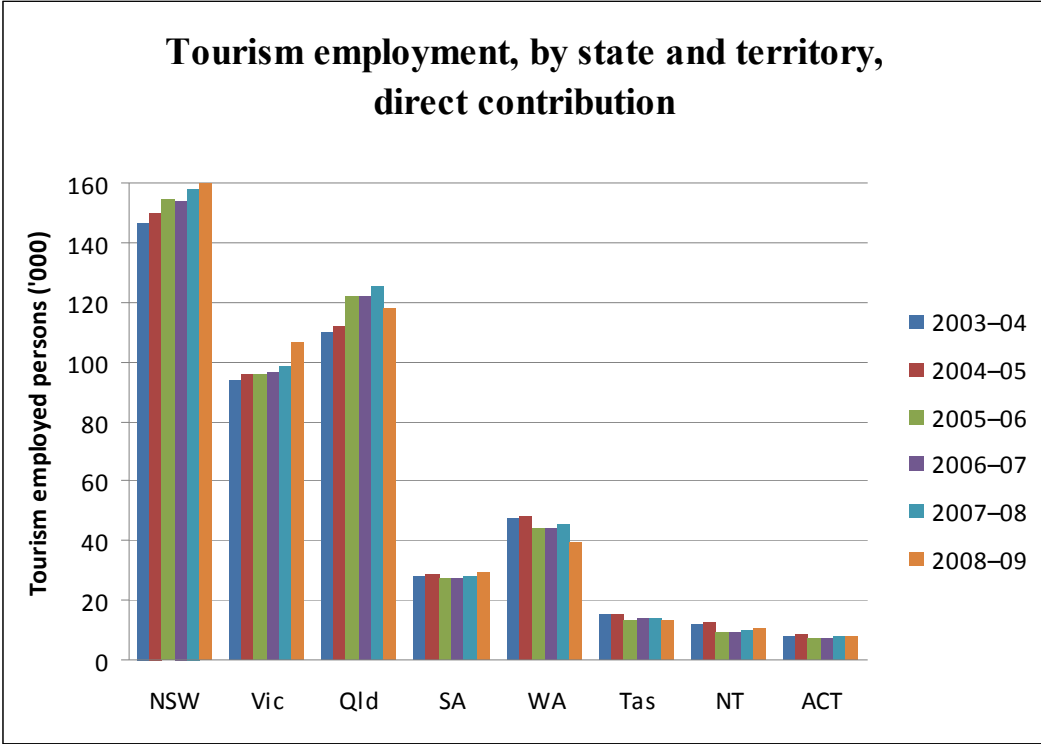
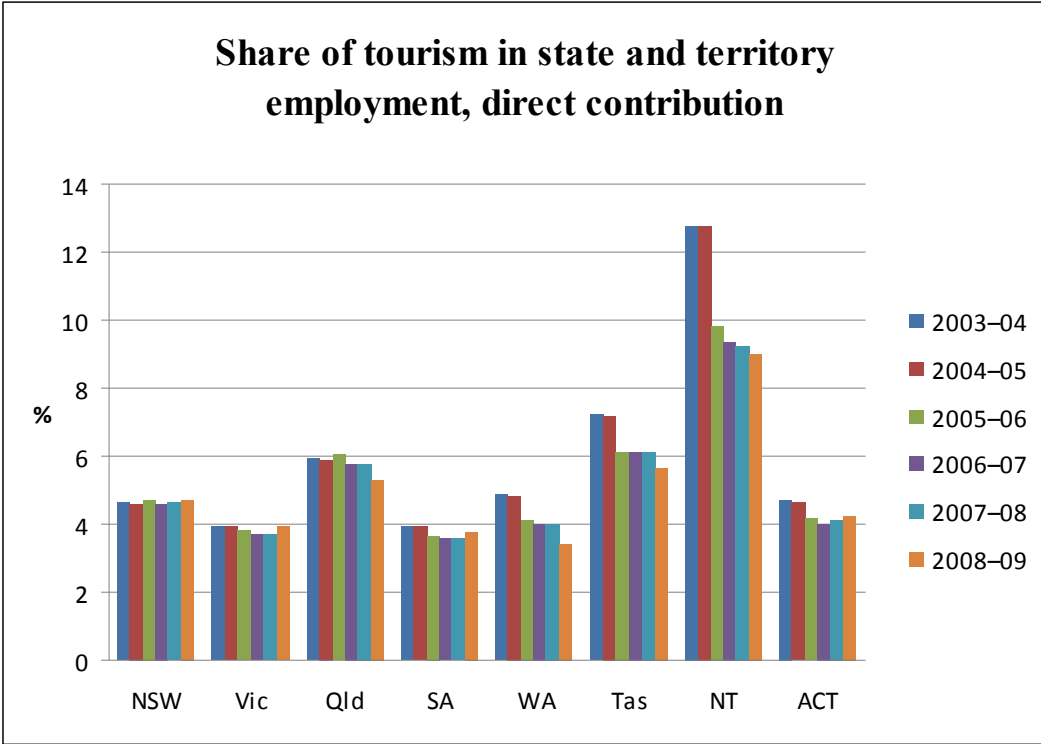


Figure 17: Share of tourism in state and territory employment, direct contribution, 2003–04 to 2008–09, %



APPENDIX A: Definitions of selected terms*

Tourism consumption

Tourism consumption is the total consumption made by visitors, or on behalf of a visitor, for and during his/her trip and stay at the destination. Included in this definition are both actual expenditure and imputations for the consumption by visitors of certain services for which they do not make a payment. Consumption before and after the trip is also included provided the expenditure is related to the trip, such as the purchase of luggage or film processing.

Tourism output

Tourism output is measured at 'basic prices', that is before any taxes on tourism product are added (or any subsidies on tourism products are deducted). Output consists of those goods and services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use.

Tourism Gross Value Added (GVA)

Tourism GVA measures the value of tourism gross output at basic prices by all industries which supply tourism products, less the value of the inputs used in producing these tourism products. Tourism GVA is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and should also be used for comparisons across countries or regions.

Tourism Gross Domestic Product (GDP) or Tourism Gross State Product (GSP)

Tourism GDP (or tourism GSP) is tourism GVA plus taxes paid less subsidies received on tourism related products as these are reflected in prices that visitors actually pay. Taxes on tourism products include the Goods and Services Tax (GST), wholesale taxes and excise duties on goods supplied to visitors. Tourism GDP and tourism GSP will generally have a higher value than tourism GVA. Tourism GDP and tourism GSP are a satellite account constructed to enable a direct comparison with the most widely recognised national accounting aggregates; GDP at the national level; and GSP at the state or territory level. While it can be useful in this context, tourism GVA is normally used when making comparisons with other industries or between countries or regions.

Direct impacts of tourism

The estimates of tourism consumption, output, GVA and GDP presented in the national TSA (ATSA) are recorded at current prices, that is, the prices prevailing in the period to which the observation relates. The estimates relate to the direct impact of tourism only. A direct impact occurs where there is a direct relationship (physical and economic) between the visitor and producer of the good or service.

Employed person

An employed person is a person aged 15 years and over whom, during the reference week of the relevant Labour Force Survey:

- worked for one hour or more for pay, profit, commission or payment in kind in a job or business, or on a farm (comprising employees, employers and own account workers);
- worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers);
- were employees who had a job but were not at work and were: on paid leave; on leave without pay for less than four weeks up to the end of the reference week; stood down without pay because of bad weather or plant breakdown at their place of employment for less than four weeks up to the end of the reference week; on strike or locked out; on workers' compensation and expected to be returning to their job; or receiving wages or salary while undertaking full-time study; or
- were employers, own account workers or contributing family workers who had a job, business or farm but were not at work.

Tourism employed person

'Tourism employed persons' are derived by multiplying the number of employed persons in each industry by the proportion of total output (tourism-related) of the industry.

** These definitions are based on the Explanatory Notes and Glossary to ABS Tourism Satellite Account, Australian National Account, 5249.0 2007–08¹³, with adjustment where necessary to reflect the state/territory focus of this report.*

APPENDIX B: Methodology and data sources

The TSA

The terminology ‘Tourism Satellite Account’ refers to the Recommended Methodological Framework for TSA (TSA:RMF) developed and endorsed internationally by the United Nations World Tourism Organization (UNWTO), the OECD, Eurostat, and the United Nations Statistical Commission¹⁴. These globally adopted concepts and methods measure the direct contribution of tourism to national economies.

History in Australia

The Australian Bureau of Statistics (ABS) began publishing its Australian TSA (ATSA) in October 2000 for the reference year 1996–97.

TSA were produced for a number of states and territories during the early 1990s, including by the Queensland Treasury, the STCRC, and private consulting firms such as Access Economics.

In November 2005, the Australian Standing Committee on Tourism (ASCOT) endorsed a proposal from the STCRC to jointly develop an integrated set of TSA for all of the Australian states and territories using common concepts, methods and definitions, consistent with the ABS national TSA (ATSA) and the international standards set out in TSA:RMF 2000. The project was to be jointly funded by the states and territories and the STCRC, with the STCRC as manager. The modeling was to be carried out by the STCRC Centre for Economics and Policy (CEP). CEP was to also develop an integrated set of tourism economic impact models using Computable General Equilibrium (CGE) modeling. The first STCRC state and territory TSA were released for the year 2003–04 in April 2007. These have subsequently been updated for the reference years 2006–07, 2007–08 and 2008–09.

In addition, the STCRC extended its TSA modeling to the regional level with the release in March 2010 of the results of a pilot project to develop estimates for the contribution of tourism to ten tourism regions in the state of Queensland¹⁵.

Methodology for state & territory TSA

The development of state and territory level TSA has involved finding solutions to a range of issues, including those arising from data limitations at the state and territory level; the differing industrial structures between the states and limited availability of data on interstate trade; and the need to ensure overall consistency in methods, definitions and aggregate results with the ATSA.

Therefore, a combination of top-down and bottom-up data and analysis has been used. Wherever possible, state specific data has been used to construct the TSA for each state and territory. However, in order to maximise consistency with the national ATSA and across the eight TSA, it has been necessary to use consistent data sets. As a result, input-output tables for each state have been derived from the MMRF-Green Computable General Equilibrium (CGE) model developed by the Centre of Policy Studies (CoPS) at Monash University¹⁶. Tourism expenditure data are sourced from a data set produced by the Federal Government’s tourism research and statistical agency, Tourism Research Australia. Top-down and bottom-up information has been used to allocate visitor expenditure from the two major national tourism surveys (the International Visitor Survey, IVS¹⁷ and the National Visitor Survey, NVS¹⁸) to each of the states.

Further details on the data sources and methods used in developing the state and territory TSA can be found at Appendix B of any of STCRC’s individual 2006–07 state and territory TSA reports¹⁹.

14 OECD et al. 2001

15 Pham et al 2010

16 Adams et al. 2000

17 Tourism Research Australia 2008a

18 Tourism Research Australia 2008b

19 See for example Ho et al 2008b

Revisions to the 2008–09 TSA

The methodology adopted by the ABS for the production of the annual ATSA involves estimating a full benchmark every third year and the statistics presented in this publication reflect the establishment of a new benchmark in respect of 2006–07. The method for compiling benchmark estimates involves the use of fully balanced supply and use tables that underlie the national accounts. Also, the latest industry data in respect of tourism related industries is incorporated.

As part of the 2006–07 benchmark process (on which the 2008–09 ATSA is based), the relationships established by the ABS in 2003–04 were reviewed and adjusted. This process incorporated revised supply-use tables and the implementation of revised international standards: Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008); Australian and New Zealand Standard Industrial Classification (ANZSIC 2006); International Recommendations for Tourism Statistics 2008 (IRTS 2008); and the System of National Accounts 2008 (SNA 2008). Full details of the key changes have been described in the Information Papers: Introduction of revised international statistical standards in the Australian Tourism Satellite Account (5249.0.55.002)²⁰, and Implementation of revised international statistical standards in the Australian Tourism Satellite Account (5249.0.55.003)²¹.

This 2008–09 state and territory TSA Summary Spreadsheet report incorporates the revisions introduced in the new ATSA. To allow comparison with previous state and territory reports, it also contains back casting, which is done by applying the new ABS TSA methodology to the previous reports for years 2003–04, 2006–07 and 2007–08. Additional estimates were also prepared for the years 2004–05 and 2005–06.

The TSA estimates for each of the states and territories in this report have been reconciled against the most recent ATSA results; published by the ABS on 14 June 2010²². This ensures that the individual state results sum to the national totals, and that individual data problems have been resolved in ways which enable overall consistency across the national and state TSA.

Indirect and total contribution of tourism

The international TSA standards as set out in RMF:TSA apply only to the measurement of the direct economic contributions of tourism. Australia's ATSA is similarly based on this approach, and reflects the need for consistency with other components of the System of National Accounts (SNA). It also allows comparison between the contribution of tourism to GVA, GSP, employment and other economic measures against those of other industries within the economy. Inclusion of indirect contributions in the TSA would invalidate such comparisons across industries because of the extensive double counting that would result.

Although the TSA methodology relates to the development of estimates of the direct economic contribution of tourism, estimates of tourism's indirect economic contribution have been provided in Chapter 3 of this report to supplement the normal TSA estimates. Indirect effects occur through flow-on effects to industries which do not themselves have direct contact with the visitor, but nonetheless supply goods and services attributable as tourism consumption. While direct effects are considered to be the most appropriate measure for comparing the economic contribution of tourism with other non-tourism industries, the aggregation of tourism's direct and indirect effects contribute to a fuller understanding of flow-on effects of tourism to output and employment within other industries, and across the economy generally.

Information on the derivation of indirect effects of tourism expenditure are provided in a previous STCRC report on the indirect economic contribution of tourism²³. To generate the 2008–09 estimates, multipliers were calculated using input-output tables for each state and territory from the Centre of Policy Studies' MMRF4 model, which has 2005 as its base year. This replaced the use of input-output data used for previous year estimates by STCRC and TRA, which were based on 2001–02 input-output tables from the ABS. Total employment is derived using an output multiplier with adjustment to exclude import intermediate costs which do not generate jobs within the Australian economy.

20 Australian Bureau of Statistics 2009d

21 Australian Bureau of Statistics 2010b

22 Australian Bureau of Statistics 2010a

23 Ho et al 2008c

Comparison with previous TSA estimates

In general, the sources and methods used to compile the 2008–09 TSA reports follow closely the approach used in the earlier 2007–08, 2006–07 and 2003–04 reports. While efforts have been made to keep the results as comparable as possible with those provided in the earlier reports, there have been improvements in methods and data sources as the project has progressed, which may have had some impacts on comparability of the results.

More importantly, there have been a number of changes in the national ATSA 2008–09 which affect comparability with earlier versions of ATSA. These are described briefly in the section on ‘Revisions to the 2008–09 TSA’ above and in Chapter 4. Because of the benchmarking of the TSA estimates to the ATSA, these changes also affect the comparability of the 2008–09 state and territory TSA with the 2007–08, 2006–07 and 2003–04 results. The changes introduced by the ABS in the 2008–09 ATSA include downward revisions to direct tourism output, direct tourism GVA, direct tourism GDP and direct tourism employment across the time series as a result of the implementation of the revised international standards. These revisions have been slightly offset by an upward revision in tourism consumption resulting from changes arising from the tourism demand-to-supply reconciliation in the benchmark process. Until the next TSA benchmark is applied (with the 2011–12 TSA release), all TSA estimates for the years beyond 2006–07 will use the 2006–07 benchmark relationships and annual demand data from TRA.

To achieve consistency with the 2008–09 ATSA, this report also contains related macro statistics referring to the Australian System of National Accounts (cat. No 5204.0)²⁴ and State Accounts 2008–09 (cat.5220.0)²⁵. Economy wide national and state accounting aggregates provide a benchmark of macro statistic such as GVA and GSP referring the year 2008–09. This statistic is also referred to in ATSA 2008–09.

The ABS updates its benchmark data at three yearly intervals. In the intervening years, the ATSA is estimated by extrapolation from the most recent benchmark year. Therefore, the 2008–09 ATSA was based on data from the new ABS 2006–07 benchmark year. Tourism estimates in this report have used data mining from detailed tourism expenditure surveys, the MMRF data base²⁶, and ABS statistics as sources to relate tourism demand and tourism output.

While these changes in sources and methods affect the validity of comparisons between successive TSA report results, tracking changes in the contribution of tourism over time is an important function of the TSA estimates. Chapter 4 provides summary comparison tables for tourism’s direct (TSA) contribution, and outlines some of the considerations which need to be taken into account in using the estimates for this purpose. More complete tables containing detailed results from the 2006–07 and 2003–04 STCRC TSA reports have also been included in Appendix C for ease of reference.

As a result of the combined effects of the significant revisions to the 2008–09 ATSA under RMF:TSA 2008 and the adoption of MMRF4 based input-output data for use in estimating indirect contributions, reliable comparisons cannot be made with previous year estimates for tourism’s indirect and total economic contribution (see Chapter 3).

Economic contribution and economic impact

TSA are designed to complement the System of National Accounts. They measure the size or economic contribution of the tourism industry in terms of output, value added, and, with the inclusion of an employment module as provided in this report, employment. They also provide information about the detailed composition of the tourism industry, e.g. by indicating how much value added is present in the accommodation part of the industry or the local transport part. This information about the size of the industry and its component parts is useful for policy makers and in applications which require measures of the size and content of the tourism industry. TSA for Australia have been used to measure trends in the productivity, prices and profitability of the tourism industry as a whole²⁷.

24 Australian Bureau of Statistics 2009a

25 Australian Bureau of Statistics 2009b

26 Adams 2006

27 Dwyer et al. 2005

However, TSA are not economic impact models. Impact models estimate the impact that one change will have on economic variables such as gross output or employment, and how this will be shared across industries in the state or territory. Changes could include: an increase in inbound tourism to a region as a result of a shift in demand; a successful marketing campaign; the development of new infrastructure; or changes in the policy framework affecting tourism or other aspects of the economy. The CEP has developed a set of state and territory tourism Computable General Equilibrium (CGE) economic impact models. These are based on concepts, definitions and—wherever possible—data sources, which are consistent with the state and territory TSA. The resulting suite of tourism CGE models and TSA makes it possible to explore a wide range of tourism measurement and economic impact issues at the state and national level in Australia. This could include analysis of the impacts of changes in various aspects of tourism demand and analysis of the likely impacts of changes in government policies.

An unique tool for public policy making

The combination of the national ATSA produced by the ABS, state and territory level TSA as provided in this report, and potentially regional level estimates of tourism's economic contribution creates an internationally unique set of rigorous and consistent statistical data on the economic contribution of tourism for Australia. This utilises internationally and nationally endorsed concepts and definitions, and is fully reconciled with the ATSA. Integrated with the CGE based tourism impact models developed by the CEP, these tools provide a previously unavailable resource for understanding tourism's economic contribution and impact as an aid to analysis and research at all levels of government in Australia.

APPENDIX C: Contribution of tourism to state and territory economies, 2006–07 and 2003–04

Table 17: Estimates of direct, indirect and total contribution of tourism, by state and territory, 2006–07²⁸

Direct contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	11279.75	6905.29	7127.92	1842.97	2972.66	835.86	775.78	565.79	32306.02
Tourism net taxes on products (\$m)	2057.37	1343.98	1657.27	412.52	682.06	188.43	158.14	130.26	6630.05
Tourism GSP, GDP (\$m)	13337.13	8249.28	8785.19	2255.49	3654.72	1024.29	933.92	696.05	38936.06
Tourism employment ('000)	157.80	102.18	118.90	27.70	45.66	13.70	9.68	7.28	482.90
Total GVA (\$m)	306979.75	230645.30	181638.56	62652.05	127784.47	18640.47	13369.55	20170.13	961880.26
Tourism share of GVA (%)	3.67	2.99	3.92	2.94	2.33	4.48	5.80	2.81	3.36
Total GSP, GDP (\$m)	335144.00	247440.00	195704.00	69540.00	141368.00	21088.00	14494.00	21586.00	1046364.00
Tourism share of GSP, GDP (%)	3.98	3.33	4.49	3.24	2.59	4.86	6.44	3.22	3.72
Total employment ('000)	3307.22	2548.89	2091.72	755.43	1085.53	223.16	102.46	188.01	10302.42
Tourism share of employment (%)	4.77	4.01	5.68	3.67	4.21	6.14	9.45	3.87	4.69
Indirect contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	8746.41	6523.68	5695.03	1885.30	3187.48	701.99	703.20	495.73	27938.82
Tourism net taxes on products (\$m)	470.34	349.66	404.28	106.70	168.35	55.10	45.46	33.30	1633.19
Tourism GSP, GDP (\$m)	9216.75	6873.34	6099.32	1992.00	3355.83	757.09	748.66	529.03	29572.01
Tourism employment ('000)	109.65	77.07	97.00	23.79	34.32	11.15	7.32	5.61	365.89
Total contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	20026.16	13428.98	12822.96	3728.27	6160.13	1537.84	1478.98	1061.52	60244.83
Tourism net taxes on products (\$m)	2527.71	1693.64	2061.56	519.22	850.42	243.53	203.60	163.56	8263.24
Tourism GSP, GDP (\$m)	22553.87	15122.61	14884.51	4247.49	7010.55	1781.37	1682.58	1225.08	68508.07
Tourism employment ('000)	267.45	179.25	215.90	51.49	79.98	24.84	17.00	12.89	848.79
Ratio of total to direct	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA	1.78	1.94	1.80	2.02	2.07	1.84	1.91	1.88	1.86
Tourism net taxes on products	1.23	1.26	1.24	1.26	1.25	1.29	1.29	1.26	1.25
Tourism GSP, GDP	1.69	1.83	1.69	1.88	1.92	1.74	1.80	1.76	1.76
Tourism employment	1.69	1.75	1.82	1.86	1.75	1.81	1.76	1.77	1.76
Share of indirect in total contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (%)	43.67	48.58	44.41	50.57	51.74	45.65	47.55	46.70	46.38
Tourism net taxes on products (%)	18.61	20.65	19.61	20.55	19.80	22.63	22.33	20.36	19.76
Tourism GSP, GDP (%)	40.87	45.45	40.98	46.90	47.87	42.50	44.49	43.18	43.17
Tourism employment (%)	41.00	43.00	44.93	46.20	42.91	44.87	43.04	43.52	43.11

28 Ho et al. 2008a

Table 18: Estimates of direct, indirect and total contribution of tourism, by state and territory, 2003–04²⁹

Direct contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	10352.1	6117.9	6633.5	1841.6	2586.3	783.6	615.7	435.3	29366
Tourism net taxes on products (\$m)	1888.8	1160.8	1478.2	395.9	583.8	166.2	124.9	97.4	5896
Tourism GSP, GDP (\$m)	12240.9	7278.7	8111.7	2237.5	3170.1	949.8	740.6	532.7	35262
Tourism employment ('000)	145.655	93.852	103.586	27.949	44.935	14	11.135	7.588	448.7
Total GVA (\$m)	264554.1	190749.1	132355.2	51797.6	85669.4	13812.5	9135.7	16717.3	764791
Tourism share of GVA (%)	3.91	3.21	5.01	3.56	3.02	5.67	6.74	2.6	3.84
Total GSP, GDP (\$m)	291540	211944	145418	57155	92445	14835	9445	17500	840282
Tourism share of GSP, GDP (%)	4.2	3.43	5.58	3.91	3.43	6.4	7.84	3.04	4.2
Total employment ('000)	3156.4	2362.5	1842.5	713.9	972.8	209.1	95.2	175.7	9528.1
Tourism share of employment (%)	4.61	3.97	5.62	3.91	4.62	6.7	11.7	4.32	4.71
Indirect contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	8027.1	5779.8	5300	1883.9	2773.2	658.1	558.1	381.4	25361.6
Tourism net taxes on products (\$m)	431.8	302	360.6	102.4	144.1	48.6	35.9	24.9	1450.4
Tourism GSP, GDP (\$m)	8458.9	6081.8	5660.6	1986.3	2917.3	706.7	594	406.4	26812
Tourism employment ('000)	101.205	70.788	84.51	23.999	33.772	11.393	8.413	5.847	339.926
Total contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (\$m)	18379.2	11897.7	11933.5	3725.5	5359.5	1441.7	1173.8	816.7	54727.6
Tourism net taxes on products (\$m)	2320.6	1462.8	1838.8	498.3	727.9	214.8	160.8	122.3	7346.4
Tourism GSP, GDP (\$m)	20699.8	13360.5	13772.3	4223.8	6087.4	1656.5	1334.6	939.1	62074
Tourism employment ('000)	246.86	164.64	188.095	51.948	78.707	25.393	19.548	13.435	788.626
Ratio of total to direct	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA	1.78	1.94	1.8	2.02	2.07	1.84	1.91	1.88	1.86
Tourism net taxes on products	1.23	1.26	1.24	1.26	1.25	1.29	1.29	1.26	1.25
Tourism GSP, GDP	1.69	1.84	1.7	1.89	1.92	1.74	1.8	1.76	1.76
Tourism employment	1.69	1.75	1.82	1.86	1.75	1.81	1.76	1.77	1.76
Share of indirect in total contribution	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism GVA (%)	43.7	48.6	44.4	50.6	51.7	45.6	47.5	46.7	46.3
Tourism net taxes on products (%)	18.6	20.6	19.6	20.5	19.8	22.6	22.3	20.4	19.7
Tourism GSP, GDP (%)	40.9	45.5	41.1	47.0	47.9	42.7	44.5	43.3	43.2
Tourism employment (%)	41.0	43.0	44.9	46.2	42.9	44.9	43.0	43.5	43.1

29 Ho et al. 2008c

APPENDIX D: Interstate tourism contribution

Tables 19–23 provide estimates of the value of production by states and territories to service ‘exports’ of tourism goods and services to other Australian states or territories.

In most cases, these ‘exports’ will occur through consumption of tourism goods and services within a state by visitors from other parts of Australia. A special case arises with certain services, notably aviation, where the service may be purchased in one state, but largely produced in another. In this case, while consumption will appear in the estimates for the state in which the purchase occurs, the actual output and contribution to GVA, GSP and employment need to be allocated among those states in which the production and employment to service this consumption actually occurs. Consequently, the following tables show the relatively larger share of NSW in tourism production by the Air, water and other transport industry, which reflects the location of significant airline headquarters and maintenance operations in Sydney.

The production identified in these tables is already incorporated in the estimates of tourism output, GVA, GSP and employment provided in Chapters 1 and 2.

A significant change has occurred in the definition and methodology used in this 2008–09 TSA, which means these estimates cannot be directly compared with those estimates of ‘Tourism Interstate Trade’ presented in state and territory TSA reports for previous years.

Previous state and territory TSA reports produced by STCRC identified a category of exports of goods and services produced in one state or territory but consumed by tourists in another state or territory, which was described as ‘Tourism Interstate Trade’. Two types of exports were identified for this purpose: Air and water transport and Manufacturing.

Prior to the revised standards for estimating tourism retail services set out in RMF:TSA 2008, value added from the manufacturing of goods for sale to visitors through retail establishments was included in the estimation of direct tourism output, GVA and GDP. This was based on the fact that only the retailer has a direct relationship with the visitor, and is therefore part of the tourism industry. With the adoption by the ABS of the new standards for its 2008–09 ATSA, manufacturing has effectively been excluded from tourism output. Thus, previously the production of wine in South Australia, for example, which was ‘exported’ to other states for consumption by visitors to that state or territory was included in South Australia’s direct tourism output. This is no longer the case. Such production continues to be picked up, however, in the estimates of tourism’s total (direct plus indirect) contribution to South Australia’s tourism output, GVA, GSP and employment (provided in Chapter 3).

As a result of these changes, the rationale for most of what has been classified as ‘Tourism Interstate Trade’ in the previous (STCRC) state and territory TSA has been removed. For this report, a new category ‘Interstate Tourism Trade’ has been developed. This effectively equates to all tourism ‘exports’ of goods and services from one state or territory to another. Such exports normally occur through visitor purchases made *within* the state or territory *during* a visit. An example might be a visitor from Victoria to Tasmania who purchases a hotel room and restaurant meals in Tasmania during their visit. This is regarded as a (tourism) ‘export’ for Tasmania.

Table 19: Tourism output, interstate, by state and territory, 2008–09, \$m

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	890	665	1179	241	206	197	149	108	3635
Ownership of dwellings	311	214	302	84	66	52	36	72	1138
Cafes, restaurants and takeaway food services	864	658	913	244	172	147	107	122	3227
Clubs, pubs, taverns and bars	230	175	243	65	46	39	28	33	859
Rail transport	27	29	44	6	11	0	3	0	120
Taxi transport	87	61	75	21	20	31	12	8	314
Other road transport	38	41	61	9	15	24	4	7	199
Air, water and other transport	1661	809	792	162	349	66	89	98	4026
Motor vehicle hiring	123	157	153	44	60	39	57	14	646
Travel agency and tour operator services	439	256	275	195	85	66	39	32	1386
Cultural services	75	78	164	25	18	21	30	10	422
Casinos and other gambling services	20	27	36	12	5	4	5	1	111
Other sports and recreation services	119	124	262	40	29	33	47	17	673
<i>Total tourism characteristic industries</i>	4886	3293	4500	1147	1081	719	606	522	16755
Tourism connected industries									
Automotive fuel retailing	46	21	34	12	7	5	8	10	141
Other retail trade	350	447	434	158	63	66	54	83	1655
Education and training	15	29	7	7	2	8	0	19	87
<i>Total tourism connected industries</i>	411	497	475	176	72	79	62	112	1883
All other industries	136	102	122	51	31	24	39	27	532
Direct tourism output, at basic prices	5433	3892	5097	1374	1185	822	707	661	19170

Table 20: Tourism output, interstate, share by state and territory, 2008–09, %

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	24.5	18.3	32.4	6.6	5.7	5.4	4.1	3.0	100.0
Ownership of dwellings	27.3	18.8	26.6	7.4	5.8	4.6	3.2	6.4	100.0
Cafes, restaurants and takeaway food services	26.8	20.4	28.3	7.6	5.3	4.6	3.3	3.8	100.0
Clubs, pubs, taverns and bars	26.8	20.4	28.3	7.6	5.3	4.6	3.3	3.8	100.0
Rail transport	22.8	24.1	36.3	5.1	9.0	0.0	2.6	0.0	100.0
Taxi transport	27.8	19.5	23.9	6.7	6.2	9.8	3.7	2.4	100.0
Other road transport	19.3	20.4	30.7	4.3	7.6	11.9	2.2	3.6	100.0
Air, water and other transport	41.3	20.1	19.7	4.0	8.7	1.6	2.2	2.4	100.0
Motor vehicle hiring	19.0	24.3	23.6	6.8	9.2	6.1	8.8	2.1	100.0
Travel agency and tour operator services	31.7	18.4	19.8	14.0	6.1	4.8	2.8	2.3	100.0
Cultural services	17.7	18.5	39.0	6.0	4.3	4.9	7.0	2.5	100.0
Casinos and other gambling services	18.1	24.6	33.0	10.4	4.6	3.6	4.7	1.1	100.0
Other sports and recreation services	17.7	18.5	39.0	6.0	4.3	4.9	7.0	2.5	100.0
<i>Total tourism characteristic industries</i>	29.2	19.7	26.9	6.8	6.5	4.3	3.6	3.1	100.0
Tourism connected industries									
Automotive fuel retailing	32.3	14.7	24.0	8.2	4.9	3.6	5.5	6.7	100.0
Other retail trade	21.2	27.0	26.2	9.5	3.8	4.0	3.3	5.0	100.0
Education and training	17.6	33.1	8.4	7.6	2.6	8.6	0.0	22.1	100.0
<i>Total tourism connected industries</i>	21.8	26.4	25.2	9.4	3.8	4.2	3.3	5.9	100.0
All other industries	25.5	19.2	22.9	9.6	5.9	4.5	7.3	5.1	100.0
Direct tourism output, at basic prices	28.3	20.3	26.6	7.2	6.2	4.3	3.7	3.4	100.0

Table 21: Tourism GVA, interstate, by state and territory, 2008–09, \$m

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	449	335	595	121	104	99	75	55	1833
Ownership of dwellings	229	158	223	62	49	39	26	53	839
Cafes, restaurants and takeaway food services	300	228	317	85	60	51	37	42	1120
Clubs, pubs, taverns and bars	112	85	118	32	22	19	14	16	418
Rail transport	14	15	22	3	6	0	2	0	61
Taxi transport	43	30	37	10	10	15	6	4	156
Other road transport	16	17	26	4	6	10	2	3	84
Air, water and other transport	586	285	280	57	123	23	32	35	1421
Motor vehicle hiring	71	90	88	25	34	23	33	8	372
Travel agency and tour operator services	266	155	166	118	51	40	23	19	839
Cultural services	32	34	71	11	8	9	13	4	181
Casinos and other gambling services	11	15	20	6	3	2	3	1	62
Other sports and recreation services	36	38	80	12	9	10	14	5	204
<i>Total tourism characteristic industries</i>	2166	1486	2043	546	485	340	279	245	7591
Tourism connected industries									
Automotive fuel retailing	12	6	9	3	2	1	2	3	38
Other retail trade	195	249	242	88	35	37	30	46	922
Education and training	12	22	6	5	2	6	0	15	66
<i>Total tourism connected industries</i>	219	277	256	96	39	44	32	63	1027
All other industries	91	68	82	34	21	16	26	18	357
Direct tourism GVA, at basic prices	2476	1831	2381	677	544	400	338	327	8974

Figure 18: Tourism GVA, interstate, by state and territory, 2008–09, \$m

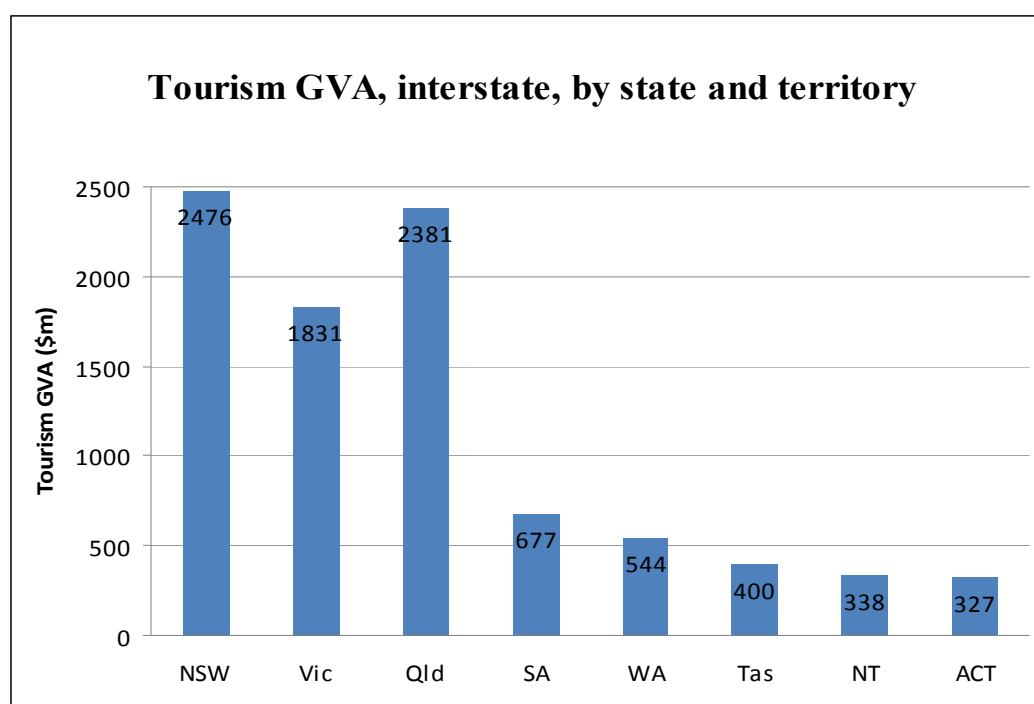


Table 22: Tourism GVA, interstate, share by state and territory, 2008–09, %

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic industries									
Accommodation	24.5	18.3	32.4	6.6	5.7	5.4	4.1	3.0	100.0
Ownership of dwellings	27.3	18.8	26.6	7.4	5.8	4.6	3.2	6.4	100.0
Cafes, restaurants and takeaway food services	26.8	20.4	28.3	7.6	5.3	4.6	3.3	3.8	100.0
Clubs, pubs, taverns and bars	26.8	20.4	28.3	7.6	5.3	4.6	3.3	3.8	100.0
Rail transport	22.8	24.1	36.3	5.1	9.0	0.0	2.6	0.0	100.0
Taxi transport	27.8	19.5	23.9	6.7	6.2	9.8	3.7	2.4	100.0
Other road transport	19.3	20.4	30.7	4.3	7.6	11.9	2.2	3.6	100.0
Air, water and other transport	41.3	20.1	19.7	4.0	8.7	1.6	2.2	2.4	100.0
Motor vehicle hiring	19.0	24.3	23.6	6.8	9.2	6.1	8.8	2.1	100.0
Travel agency and tour operator services	31.7	18.4	19.8	14.0	6.1	4.8	2.8	2.3	100.0
Cultural services	17.7	18.5	39.0	6.0	4.3	4.9	7.0	2.5	100.0
Casinos and other gambling services	18.1	24.6	33.0	10.4	4.6	3.6	4.7	1.1	100.0
Other sports and recreation services	17.7	18.5	39.0	6.0	4.3	4.9	7.0	2.5	100.0
<i>Total tourism characteristic industries</i>	28.5	19.6	26.9	7.2	6.4	4.5	3.7	3.2	100.0
Tourism connected industries									
Automotive fuel retailing	32.3	14.7	24.0	8.2	4.9	3.6	5.5	6.7	100.0
Other retail trade	21.2	27.0	26.2	9.5	3.8	4.0	3.3	5.0	100.0
Education and training	17.6	33.1	8.4	7.6	2.6	8.6	0.0	22.1	100.0
<i>Total tourism connected industries</i>	21.3	27.0	25.0	9.4	3.8	4.3	3.1	6.2	100.0
All other industries	25.5	19.2	22.9	9.6	5.9	4.5	7.3	5.1	100.0
Total direct TGVA, at basic prices	27.6	20.4	26.5	7.5	6.1	4.5	3.8	3.6	100.0

Figure 19: State and territory share of total tourism GVA, interstate, 2008–09, %

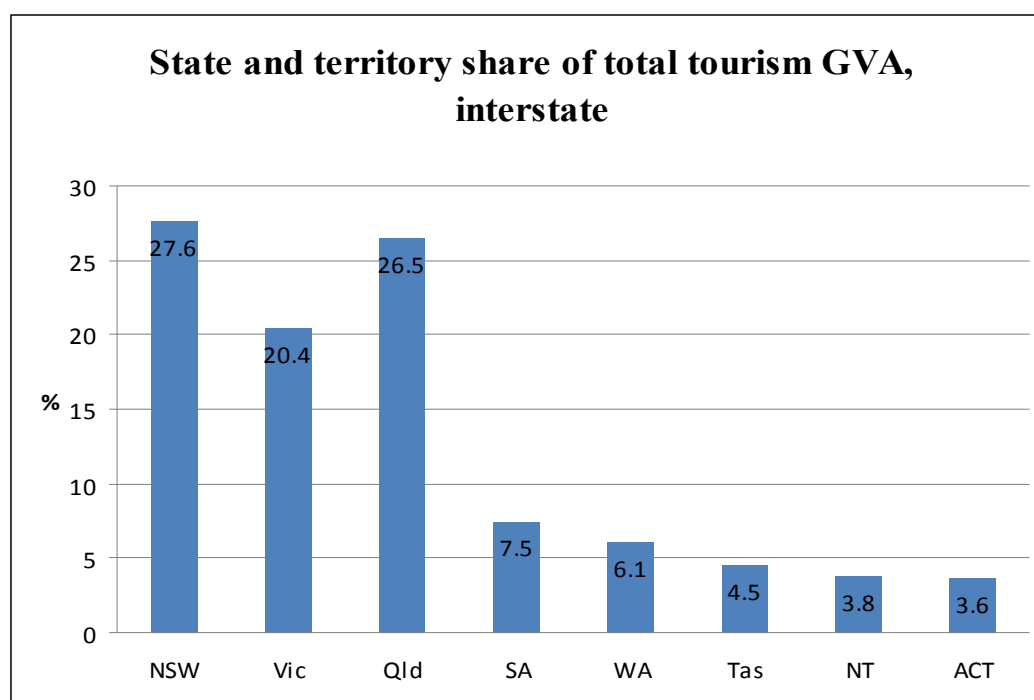


Table 23: Tourism employment, interstate, by state and territory, 2008–09, '000

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	AUS
Tourism characteristic and connected industries									
Accommodation ('000)	5.7	4.3	7.6	1.6	1.3	1.3	1.0	0.7	23.4
Cafes, restaurants and takeaway food services ('000)	11.1	8.4	11.7	3.1	2.2	1.9	1.4	1.6	41.4
Clubs, pubs, taverns and bars ('000)	2.1	1.6	2.2	0.6	0.4	0.4	0.3	0.3	7.8
Rail transport ('000)	0.1	0.1	0.2	0.0	0.1	0.0	0.0	0.0	0.6
Road transport and transport equipment rental ('000)	1.7	1.8	2.0	0.5	0.6	0.6	0.5	0.2	7.9
Air, water and other transport ('000)	4.4	2.2	2.1	0.4	0.9	0.2	0.2	0.3	10.7
Travel agency and tour operator services ('000)	5.2	3.0	3.2	2.3	1.0	0.8	0.5	0.4	16.3
Cultural services ('000)	0.7	0.7	1.4	0.2	0.2	0.2	0.3	0.1	3.7
Casinos and other gambling services ('000)	0.1	0.2	0.2	0.1	0.0	0.0	0.0	0.0	0.7
Other sports and recreation services ('000)	1.4	1.4	3.0	0.5	0.3	0.4	0.5	0.2	7.7
Retail trade ('000)	5.2	6.1	6.1	2.2	0.9	0.9	0.8	1.2	23.4
Education and training ('000)	0.2	0.3	0.1	0.1	0.0	0.1	0.0	0.2	0.9
Total tourism characteristic and connected industries ('000)	37.8	30.0	39.9	11.5	8.0	6.7	5.4	5.1	144.4
All other industries ('000)	1.0	0.7	0.9	0.4	0.2	0.2	0.3	0.2	3.9
Total tourism employed persons ('000)	38.8	30.8	40.8	11.9	8.2	6.9	5.7	5.3	148.4

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Acronyms

ABS	Australian Bureau of Statistics
ACT	Australian Capital Territory
ANZSIC	Australian New Zealand Standard Industrial Classification
ATSA	Australian Tourism Satellite Account
AUS	Australia
CEP	Centre for Economics and Policy, University of New South Wales
CGE	Computable General Equilibrium
CoPS	Centre of Policy Studies, Monash University
Eurostat	Statistical Office of the European Communities
GDP	Gross Domestic Product
GSP	Gross State Product
GST	Goods and Services Tax
GVA	Gross Value Added
IVS	International Visitor Survey (TRA)
MMRF	Monash Multi-Regional Forecasting (CGE model)
NSW	New South Wales
NT	Northern Territory
NVS	National (domestic) Visitor Survey (TRA)
OECD	Organisation for Economic Cooperation and Development
Qld	Queensland
SA	South Australia
SNA	System of National Accounts
STCRC	Sustainable Tourism Cooperative Research Centre
Tas	Tasmania
TRA	Tourism Research Australia
TSA	Tourism Satellite Account
TSA: RMF	Tourism Satellite Account: Recommended Methodological Framework
UNSD	United Nations Statistics Division
UNWTO	World Tourism Organization
Vic	Victoria
WA	Western Australia