

TOURISM SATELLITE ACCOUNT *AUSTRALIAN
NATIONAL
ACCOUNTS*

EMBARGO: 11.30AM (CANBERRA TIME) WED 15 DEC 2010

C O N T E N T S

	<i>page</i>
Notes	2
Analysis of Results	3

T A B L E S

List of Tables	9
Monetary aggregates	10
Other tourism aggregates	25

A D D I T I O N A L I N F O R M A T I O N

Explanatory Notes	28
Appendix 1: Tourism product correspondence	40
Appendix 2: Tourism industry correspondence	42
Glossary	44
Bibliography	49

I N Q U I R I E S

For further information
about these and related
statistics, contact the
National Information and
Referral Service on
1300 135 070 or
Darren Page on Brisbane
(07) 3222 6030.

NOTES

ABOUT THIS PUBLICATION	This publication presents the key results of the Tourism Satellite Account (TSA) for the years 2001-02 to 2009-10. Work on the TSA has been funded by the Department of Resources, Energy and Tourism (RET). The complete TSA time series from 1997-98 to 2009-10 is available in the data cube associated with this publication on the ABS website.
CHANGES IN THIS ISSUE	The 2009-10 publication reflects results from the annual TSA update process where estimates for the latest year are modelled using movements in visitor consumption, and consequently a less detailed set of information is presented.
REVISIONS IN THIS ISSUE	<p>Revisions to source data used in the compilation of the TSA have also resulted in minor revisions to earlier year estimates. In particular, the following estimates have been revised:</p> <ul style="list-style-type: none">■ Estimates of passenger transport services provided to international visitors have been revised as a result of revisions to international trade in services data compiled by the ABS.■ Economy wide national accounting aggregates have been revised to make them consistent with the 2009-10 issue of Australian System of National Accounts (cat. no. 5204.0), impacting on ratios of tourism to overall economic activity.■ Estimates of tourism employment for the Air, water and other transport industry have been revised over all years of the TSA time series.
DATA VALUES AND ROUNDING	All values, unless otherwise indicated, are shown in Australian dollars rounded to the nearest million. Where figures have been rounded, discrepancies may occur between the sums of the component items and totals.
NEXT ISSUE	The 2010-11 issue of this publication is expected to be released in December 2011.

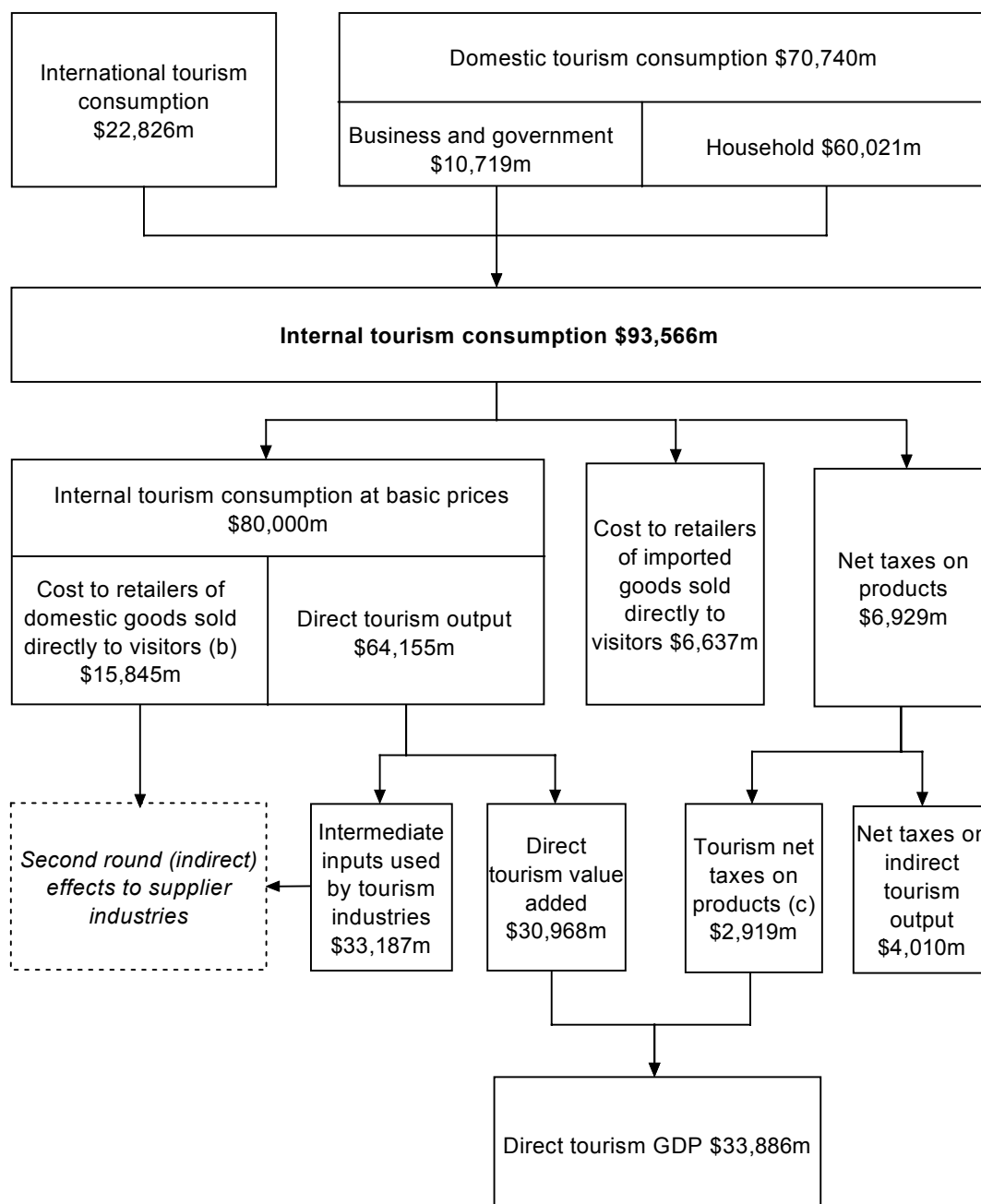
Ian Ewing
Acting Australian Statistician

ANALYSIS OF RESULTS

KEY RESULTS

Flow of Tourism Consumption through the Australian Economy (a)

Year ended June 2010



(a) Tourism consumption is measured in purchasers' prices unless otherwise specified. Other monetary aggregates are measured in basic prices.

(b) Includes wholesale and transport margins supplied domestically.

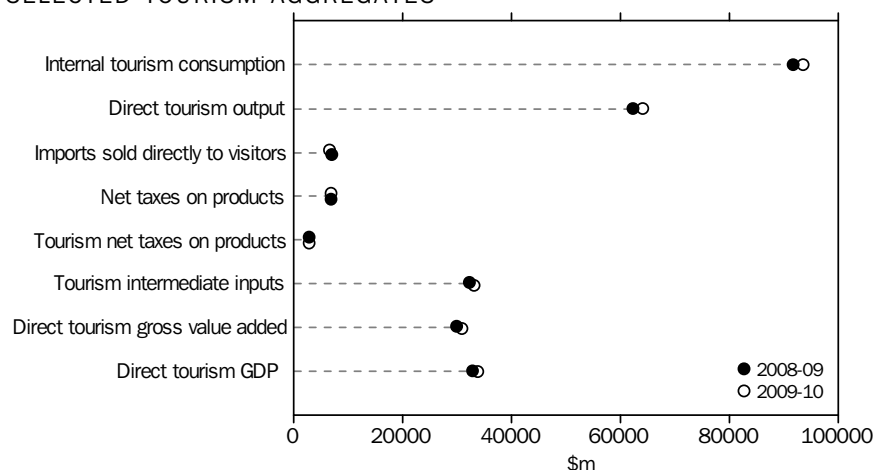
(c) In the case of goods, this will only include the net taxes attributable to retail trade activities.

ANALYSIS OF RESULTS *continued*

KEY RESULTS *continued*

Tourism is not an industry or product in international statistical standards but it is commonly considered an industry by tourism researchers and economic analysts. In the Australian Tourism Satellite Account (TSA), the direct contribution of the tourism industry to the Australian economy has been measured using the demand generated by visitors and the supply of tourism products by domestic producers.

SELECTED TOURISM AGGREGATES



Internal tourism consumption is the total value of goods and services consumed by both resident and non-resident visitors within Australia. It is measured in purchasers' prices (the price paid by the tourism consumer). In 2009-10 internal tourism consumption increased by 2.0% to \$93,566m. The receipts of Australian producers of tourism goods and services exclude product taxes like the Goods and Services Tax (GST) and include subsidies (collectively known as net taxes). In 2009-10 net taxes on tourism products increased by 0.1% to \$6,929m.

Imported goods and services consumed by visitors are not part of domestic production by Australian industries. The cost to retailers of imported goods sold directly to visitors decreased by 6.7% to \$6,637m in 2009-10. Over the same period, internal tourism consumption at basic prices (internal tourism consumption at purchaser prices less imports and net taxes on tourism products) has increased by 2.9% to \$80,000m.

In the case of retail goods purchased by visitors, only the retail margin contributes to direct tourism output, value added and Gross Domestic Product (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. As a consequence the output, and consequently value added, attributed to other (than retail) industries is excluded from the value of direct tourism output. Direct tourism output is therefore equal to internal tourism consumption at basic prices less the cost to retailers of domestic goods sold directly to visitors. In 2009-10, direct tourism output has increased by 2.9% to \$64,155m.

When producing tourism goods and services Australian businesses use goods and services produced and supplied by other businesses. These are known as intermediate inputs and in 2009-10 increased by 2.6% to \$33,187m.

ANALYSIS OF RESULTS *continued*

DIRECT TOURISM GROSS VALUE ADDED

Industry gross value added measures the value of production exclusive of product taxes such as the GST. It is the preferred national accounts measure of the production of industries because it is free from distortions in prices caused by changes in tax rates or the introduction of new taxes.

Direct tourism gross value added is calculated by subtracting tourism intermediate inputs from direct tourism output at basic prices. In 2009-10 direct tourism gross value added increased by 3.2% to \$30,968m. Total industry gross value added increased by 2.2% to \$1,197,780m, resulting in tourism share of value added remaining unchanged at 2.6%. When comparing tourism to other industries and the total economy it must be understood that tourism is not a distinct industry, rather it comprises a portion of the economic activity classified to ANZSIC industries in the core national accounts.

GROWTH IN INDUSTRY GROSS VALUE ADDED, CURRENT PRICES



DIRECT TOURISM GROSS DOMESTIC PRODUCT (DIRECT TOURISM GDP)

Direct tourism GDP is calculated by adding tourism net taxes on products to direct tourism gross value added. In the case of goods, tourism net taxes on products will only include the net taxes attributable to retail trade activities, consistent with the derivation of other tourism supply measures. In 2009-10 direct tourism GDP increased by 3.2% to \$33,886m in contrast to GDP for the Australian economy which grew by 2.3%.

All the aggregates above are presented in current price terms, and so include the effects of price change as well as the volume of tourism activity. Volume estimates of tourism have not been compiled because of conceptual issues involved in deflating the supply side estimates. In the absence of volume estimates, the tourism share of industry GDP is presented. In 2009-10 the tourism share of GDP was unchanged at 2.6%. Tourism share of GDP has declined steadily since a peak of 3.4% in 2000-01. While the peak in 2000-01 was heavily impacted by price increases in tourism services, resulting from the introduction of the GST and the volume impact of the Olympic Games, the overall trend of declining share has continued over a long period.

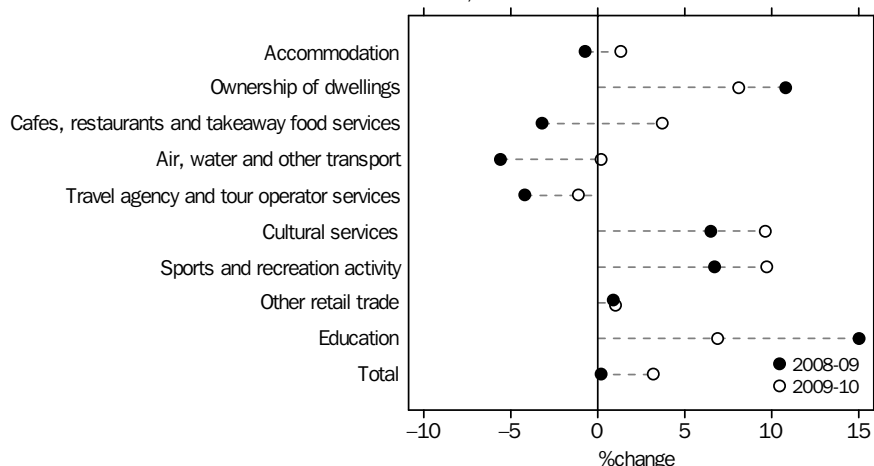
COMPONENTS OF TOURISM INDUSTRY GROSS VALUE ADDED

Accommodation; Air, water and other transport; Cafes, restaurants and takeaway food services and Other retail trade continue to be the most important tourism industries, combined accounting for 56.0% of direct tourism gross value added in 2009-10.

ANALYSIS OF RESULTS *continued*

COMPONENTS OF TOURISM INDUSTRY GROSS VALUE ADDED *continued*

GROWTH IN TOURISM VALUE ADDED, SELECTED INDUSTRIES



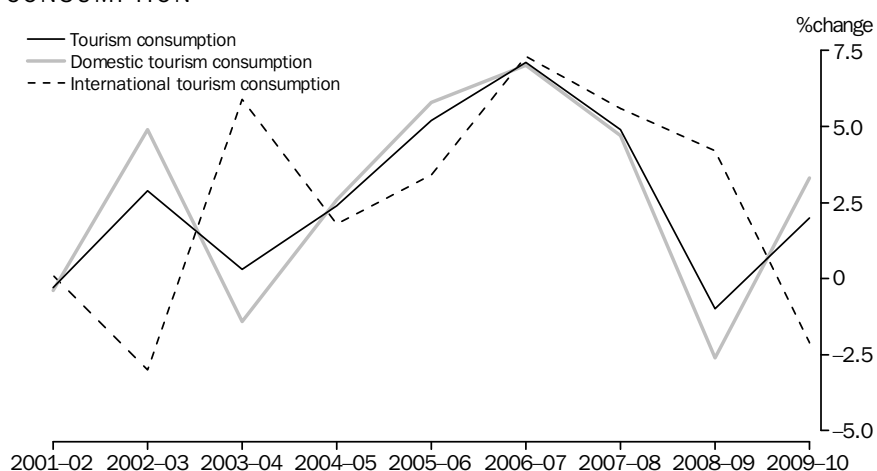
Direct tourism gross value added increased by \$960m (3.2%) in 2009-10 to \$30,968m. The tourism related industries representing the largest contributors to the increase in tourism gross value added in this period were Ownership of dwellings (up \$193m, 8.1%), Education and training (up \$159m, 6.9%) and Cafes, restaurants and takeaway food services (up \$124m, 3.7%). Travel agencies and tour operator services (down \$16m, -1.1%) and Casinos and other gambling services (down \$2m, -1.0%) were the only negative contributors to direct tourism gross value added.

COMPONENTS OF TOURISM CONSUMPTION

Internal tourism consumption increased by 2.0% to \$93,566m in 2009-10 following a fall of 1.0% in 2008-09. Domestic tourism consumption increased by 3.3% to \$70,740m and international tourism consumption decreased by 2.1% to \$22,826m.

In the period 2009-10, domestic tourism consumption represents 75.6% of total tourism consumption, whereas international consumption represents 24.4%. The international component of total internal tourism consumption has decreased in share from 25.4% in 2008-09 following increases in share over the three previous years.

GROWTH IN TOTAL, DOMESTIC AND INTERNATIONAL TOURISM CONSUMPTION



ANALYSIS OF RESULTS *continued*

COMPONENTS OF TOURISM CONSUMPTION *continued*

Of the 3.3% increase in domestic tourism consumption in 2009-10, consumption by households increased by \$2,102m (3.6%) and consumption by business and government increased by \$190m (1.8%).

The major contributors to the increase in domestic tourism consumption in this period were Long distance passenger transportation (up \$626m, 6.5%); Takeaway and restaurant meals (up \$497m, 4.4%); Recreational, cultural and sporting services (up \$312m, 11.3%); Other tourism goods and services (up \$285m, 14.8%) and Accommodation services (up \$279m, 4.0%). The major contributors to the decrease in international tourism consumption were Long distance passenger transportation and Accommodation services, down 12.5% and 5.3% respectively.

SHARE OF TOURISM CONSUMPTION, Selected tourism products—By type of visitor: **2009-10**

	<i>Households</i>	<i>Business/government</i>	<i>International</i>	<i>All visitors</i>
	%	%	%	%
Long distance passenger transportation	10.9	34.2	19.3	15.6
Takeaway & restaurant meals	16.9	15.1	10.5	15.1
Shopping (including gifts and souvenirs)	16.4	—	12.2	13.5
Accommodation services	8.5	19.4	13.7	11.0
Fuel (petrol, diesel)	9.5	11.4	1.7	7.8
Food products	9.0	2.1	8.2	8.0
Alcoholic beverages and other beverages	4.7	3.5	4.7	4.6
Taxi fares	0.4	2.8	1.2	0.9
All other tourism products	23.7	11.4	28.6	23.5
Total	100.0	100.0	100.0	100.0

— nil or rounded to zero (including null cells)

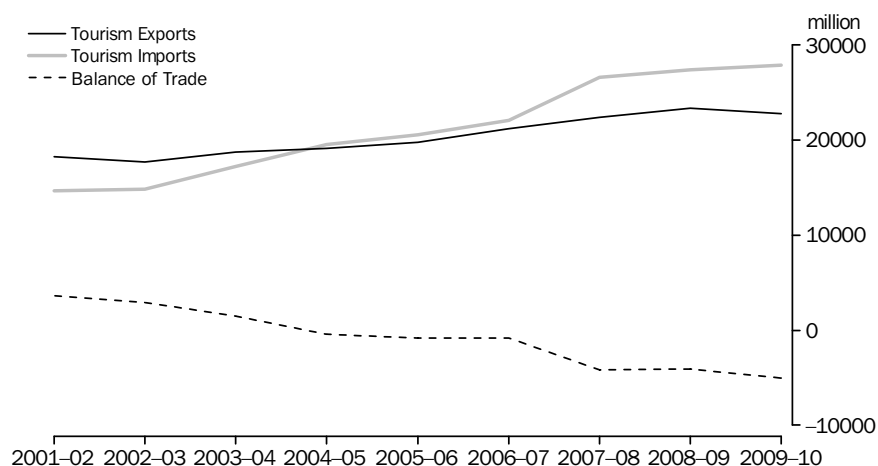
The major contributors to total tourism consumption continue to be Long distance passenger transportation, Takeaway and restaurant meals, Shopping (including gifts and souvenirs) and Accommodation services. Combined, these products contribute 55.2% of total tourism consumption in 2009-10. This combined contribution to total tourism consumption is down 0.5% on 2008-09, mainly driven by decreases in contribution to total tourism consumption of Shopping, gifts and souvenirs (down 0.4%) and Long distance passenger transportation (down 0.3%), offset by Takeaway and restaurant meals which increased its share of total consumption (up 0.3%).

ANALYSIS OF RESULTS *continued*

INTERNATIONAL TRADE IN TOURISM

Tourism exports are domestically produced goods and services consumed by international visitors to Australia. Tourism imports are consumption of overseas produced goods and services by Australians on overseas trips. Since 2004-05 tourism imports have exceeded tourism exports, resulting in deficits in the tourism balance of trade (tourism exports less tourism imports). In 2009-10 the deficit totalled \$5,048m.

INTERNATIONAL TRADE IN TOURISM



TOURISM EMPLOYED PERSONS

The tourism industry employed 500,500 persons in 2009-10, a increase of 6,900 (1.4%) on 2008-09. This compares with an increase of 1.3% in total employed persons in the Australian economy. Tourism share of total employment remains steady at 4.5% when compared to 2008-09. Since 2001-02, the tourism share of total employment has decreased by 0.5 percentage points.

VISITOR NUMBERS

The increase in tourism consumption by Same day domestic visitors in 2009-10 (up 6.7%) was the result of both an increase in the number of visitors (up 6.7%) and a relatively unchanged per visitor consumption. The increase in tourism consumption by Overnight domestic visitors (up 2.3%) was the result of a small decrease in the number of visitors (down 1.0%) combined with an increase in the per visitor consumption (up 3.4%).

The decrease in international tourism consumption in 2009-10 (down 2.1%) was the result of an increase in the number of visitors (up 2.7%) combined with a decrease in per visitor consumption (down 4.7%). The overall increase in the number of international visitors to Australia was driven mainly by gains in the number of visitors from the United States of America, China and Indonesia.

The number of Australians travelling overseas grew by 15.9% in 2009-10, with the growth driven by increased number of Australians visiting Indonesia, the United States of America and New Zealand.

LIST OF TABLES

page

MONETARY AGGREGATES

1	Tourism industry share of gross domestic product	10
2	Direct tourism gross domestic product, by type of visitor	11
3	Direct tourism output, by tourism related industries, basic prices	12
4	Direct tourism gross value added, by tourism related industry	13
5	Tourism contribution to industry gross value added, by industry division	14
6	Internal tourism consumption, by tourism related product, purchasers' prices	16
7	Internal tourism consumption, by type of visitor by tourism related product, purchasers' prices	18
8	Average internal tourism consumption, by type of visitor by tourism related product, purchasers' prices	20
9	Domestic tourism consumption, by length of stay by tourism related product, purchasers' prices	22
10	Tourism consumption by Australian residents on outbound trips	24
11	Tourism consumption by non-residents on inbound trips	24

OTHER TOURISM AGGREGATES

12	Direct tourism employment, by industry	25
13	Number of tourism trips, by type of visitor by length of stay	25
14	Short-term arrivals by international visitors, by country of residence	26
15	Short-term departures by Australian residents, by main destination	27

TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

DIRECT TOURISM GROSS DOMESTIC PRODUCT (GDP) AND ASSOCIATED STATISTICS

Direct tourism gross value added at basic prices (\$m)	22 860	24 000	24 246	24 852	26 101	28 262	29 935	30 008	30 968
plus Tourism net taxes on products (\$m)	2 176	2 259	2 314	2 393	2 445	2 644	2 868	2 836	2 919
equals Direct tourism GDP (\$m)	25 036	26 259	26 560	27 244	28 546	30 906	32 803	32 844	33 886
Gross domestic product (\$m)(a)	759 028	804 261	865 271	926 447	1 001 440	1 091 633	1 185 740	1 255 241	1 284 670

Tourism share of gross value added (%) (b)	3.3	3.3	3.1	2.9	2.8	2.8	2.7	2.6	2.6
Tourism share of gross domestic product (%) (b)	3.3	3.3	3.1	2.9	2.9	2.8	2.8	2.6	2.6

PERCENTAGE CHANGES (c)

Direct tourism gross value added at basic prices (%)	3.6	5.0	1.0	2.5	5.0	8.3	5.9	0.2	3.2
Direct tourism GDP (%)	3.4	4.9	1.1	2.6	4.8	8.3	6.1	0.1	3.2
Gross domestic product (%)	7.1	6.0	7.6	7.1	8.1	9.0	8.6	5.9	2.3

(a) Source: Australian System of National Accounts, 2009-10 (cat. no. 5204.0)

(c) Percentage change on preceding year.

(b) Only the direct tourism shares are included here. For an activity to be included as tourism, there must be a direct relationship between the visitor and the producer of the good or service.

DIRECT TOURISM GROSS DOMESTIC PRODUCT, By type of visitor

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
.....									
DIRECT TOURISM GDP (\$m)									
Domestic									
Households	15 198	16 169	16 093	16 339	17 042	18 498	19 685	19 542	20 655
Business/government	3 145	3 290	3 222	3 435	3 773	4 033	4 151	3 902	4 019
Total domestic	18 342	19 459	19 314	19 773	20 815	22 531	23 836	23 444	24 674
International	6 694	6 801	7 246	7 471	7 730	8 375	8 966	9 400	9 212
TOTAL	25 036	26 259	26 560	27 244	28 546	30 906	32 803	32 844	33 886
.....									
SHARE OF DIRECT TOURISM GDP (%)									
Domestic									
Households	60.7	61.6	60.6	60.0	59.7	59.9	60.0	59.5	61.0
Business/government	12.6	12.5	12.1	12.6	13.2	13.0	12.7	11.9	11.9
Total domestic	73.3	74.1	72.7	72.6	72.9	72.9	72.7	71.4	72.8
International	26.7	25.9	27.3	27.4	27.1	27.1	27.3	28.6	27.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
.....									
TOURISM SHARE OF GDP (%) (a)									
Domestic									
Households	2.0	2.0	1.9	1.8	1.7	1.7	1.7	1.6	1.6
Business/government	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.3	0.3
Total domestic	2.4	2.4	2.2	2.1	2.1	2.1	2.0	1.9	1.9
International	0.9	0.8	0.8	0.8	0.8	0.8	0.8	0.7	0.7
TOTAL	3.3	3.3	3.1	2.9	2.9	2.8	2.8	2.6	2.6

(a) Only the direct tourism share is included here. For an activity to be included as tourism, there must be a direct relationship between the visitor and the producer of the good or service.

DIRECT TOURISM OUTPUT, By tourism related industry—Basic Prices

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Tourism characteristic industries									
Accommodation	7 307	7 571	7 658	8 012	8 573	9 649	10 618	10 543	10 677
Ownership of dwellings	1 967	2 023	2 046	2 282	2 432	2 624	2 919	3 234	3 496
Cafes, restaurants and takeaway food services	8 226	8 593	8 273	8 381	8 711	9 269	9 932	9 617	9 976
Clubs, pubs, taverns and bars	2 153	2 235	2 236	2 285	2 390	2 470	2 634	2 577	2 645
Rail transport	767	772	763	742	809	926	900	885	897
Taxi transport	549	538	586	569	657	804	785	704	763
Other road transport	962	966	962	965	1 053	1 321	1 321	1 291	1 316
Air, water and other transport	11 569	11 293	11 180	11 850	12 704	13 387	13 862	13 085	13 116
Motor vehicle hiring	844	879	902	936	1 038	1 134	1 123	1 137	1 228
Travel agency and tour operator services	1 979	1 990	1 999	2 000	2 241	2 390	2 492	2 387	2 361
Cultural services	897	909	988	994	907	969	1 011	1 076	1 180
Casinos and other gambling services	278	281	334	351	374	351	364	369	365
Other sports and recreation services	1 460	1 478	1 609	1 620	1 476	1 545	1 611	1 718	1 885
<i>Total tourism characteristic industries</i>	<i>38 959</i>	<i>39 529</i>	<i>39 538</i>	<i>40 987</i>	<i>43 365</i>	<i>46 839</i>	<i>49 573</i>	<i>48 625</i>	<i>49 905</i>
Tourism connected industries									
Automotive fuel retailing	512	545	540	554	564	576	600	607	612
Other retail trade	5 849	6 211	6 149	6 297	6 409	6 568	6 830	6 889	6 960
Education and training	1 702	1 718	2 015	2 171	2 218	2 373	2 645	3 043	3 252
<i>Total tourism connected industries</i>	<i>8 063</i>	<i>8 474</i>	<i>8 704</i>	<i>9 021</i>	<i>9 192</i>	<i>9 517</i>	<i>10 076</i>	<i>10 538</i>	<i>10 825</i>
All other industries	3 256	3 402	3 307	2 908	2 984	3 111	3 186	3 194	3 425
DIRECT TOURISM OUTPUT, at basic prices	50 279	51 405	51 549	52 916	55 540	59 467	62 834	62 358	64 155

DIRECT TOURISM GROSS VALUE ADDED, By tourism related industry

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Tourism characteristic industries									
Accommodation	3 573	3 702	3 745	3 918	4 192	4 867	5 356	5 318	5 385
Ownership of dwellings	1 480	1 522	1 539	1 717	1 830	1 935	2 152	2 385	2 578
Cafes, restaurants and takeaway food services	2 931	3 062	2 948	2 986	3 104	3 216	3 446	3 337	3 461
Clubs, pubs, taverns and bars	1 043	1 083	1 084	1 107	1 158	1 202	1 282	1 255	1 287
Rail transport	359	361	357	347	378	473	460	452	458
Taxi transport	224	220	239	232	268	400	390	350	379
Other road transport	378	380	379	380	414	556	557	544	554
Air, water and other transport	3 434	3 884	3 918	4 156	4 455	4 724	4 893	4 618	4 629
Motor vehicle hiring	485	505	519	538	596	652	646	654	706
Travel agency and tour operator services	1 277	1 285	1 291	1 291	1 447	1 446	1 508	1 445	1 429
Cultural services	388	393	427	430	393	417	434	463	507
Casinos and other gambling services	156	157	187	196	209	197	204	207	204
Other sports and recreation services	458	464	505	508	463	469	489	521	572
<i>Total tourism characteristic industries</i>	<i>16 187</i>	<i>17 018</i>	<i>17 137</i>	<i>17 807</i>	<i>18 908</i>	<i>20 553</i>	<i>21 816</i>	<i>21 547</i>	<i>22 151</i>
Tourism connected industries									
Automotive fuel retailing	139	147	146	150	153	156	163	164	166
Other retail trade	3 102	3 294	3 261	3 339	3 399	3 661	3 807	3 840	3 879
Education and training	1 283	1 295	1 519	1 636	1 672	1 807	2 014	2 317	2 476
<i>Total tourism connected industries</i>	<i>4 524</i>	<i>4 737</i>	<i>4 926</i>	<i>5 126</i>	<i>5 224</i>	<i>5 623</i>	<i>5 983</i>	<i>6 321</i>	<i>6 521</i>
All other industries	2 149	2 245	2 183	1 919	1 969	2 085	2 135	2 140	2 295
DIRECT TOURISM GROSS VALUE ADDED, at basic prices	22 860	24 000	24 246	24 852	26 101	28 262	29 935	30 008	30 968
Tourism net taxes on products	2 176	2 259	2 314	2 393	2 445	2 644	2 868	2 836	2 919
DIRECT TOURISM GDP	25 036	26 259	26 560	27 244	28 546	30 906	32 803	32 844	33 886

TOURISM CONTRIBUTION TO INDUSTRY GROSS VALUE ADDED, By industry division(a)

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
DIRECT TOURISM GROSS VALUE ADDED (\$m)									
Agriculture, forestry and fishing	—	—	—	—	—	—	—	—	—
Mining	—	—	—	—	—	—	—	—	—
Manufacturing	—	—	—	—	—	—	—	—	—
Electricity, gas, water and waste services	—	—	—	—	—	—	—	—	—
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	—	—	—	—	—	—	—	—	—
Retail trade	3 241	3 442	3 408	3 489	3 552	3 817	3 969	4 004	4 045
Accommodation and food services	7 548	7 848	7 777	8 012	8 455	9 285	10 084	9 909	10 134
Transport, postal and warehousing	4 968	5 426	5 456	5 639	6 079	6 854	6 951	6 600	6 657
Information media and telecommunications	504	539	522	447	449	440	477	486	533
Financial and insurance services	63	68	66	56	57	55	60	61	67
Rental, hiring and real estate services(b)	516	539	551	566	625	679	675	684	739
Professional, scientific and technical services	5	5	5	4	4	4	4	4	5
Administrative and support services	1 455	1 475	1 475	1 449	1 606	1 601	1 676	1 616	1 617
Public administration and safety	—	—	—	—	—	—	—	—	—
Education and training	1 283	1 295	1 519	1 636	1 672	1 807	2 014	2 317	2 476
Health care and social assistance	565	604	586	502	506	492	534	546	599
Arts and recreation services	1 002	1 014	1 119	1 135	1 065	1 082	1 127	1 190	1 284
Other services	230	225	224	199	203	210	211	205	234
Ownership of dwellings	1 480	1 522	1 539	1 717	1 830	1 935	2 152	2 385	2 578
DIRECT TOURISM GROSS VALUE ADDED, at basic prices	22 860	24 000	24 246	24 852	26 101	28 262	29 935	30 008	30 968
TOTAL INDUSTRY GROSS VALUE ADDED (\$m) (c)									
Agriculture, forestry and fishing	31 291	23 504	26 740	26 775	27 235	23 839	26 700	27 721	27 358
Mining	35 835	36 356	34 522	46 397	66 383	77 233	83 727	114 462	100 231
Manufacturing	81 013	89 133	95 820	97 080	99 822	103 410	110 497	109 403	111 654
Electricity, gas, water and waste services	17 936	19 342	20 439	21 871	22 754	23 589	24 681	25 286	25 340
Construction	42 675	49 282	56 571	62 182	66 836	76 763	84 734	90 087	94 237
Wholesale trade	34 737	38 836	41 582	43 380	44 945	47 667	52 393	55 273	57 949
Retail trade	34 834	36 771	39 410	41 449	43 522	47 664	51 362	53 766	53 259
Accommodation and food services	18 496	18 955	21 056	22 280	23 781	25 262	26 162	26 574	27 324
Transport, postal and warehousing	35 125	38 056	41 219	45 394	47 988	55 719	59 062	59 876	62 111
Information media and telecommunications	27 052	28 407	30 355	32 097	32 302	34 182	36 172	38 528	39 227
Financial and insurance services	63 395	63 733	72 556	82 322	91 857	110 904	128 249	128 151	127 008
Rental, hiring and real estate services(b)	20 943	25 060	24 972	26 336	28 830	30 961	33 758	33 370	32 668
Professional, scientific and technical services	40 503	43 561	47 096	50 745	55 708	61 924	68 533	75 097	86 988
Administrative and support services	18 352	19 644	21 242	22 742	25 040	27 357	29 825	28 964	29 880
Public administration and safety	39 506	41 425	44 536	47 512	51 903	55 469	57 350	61 437	62 602
Education and training	32 620	35 083	36 945	39 992	42 849	45 529	47 116	50 797	53 085
Health care and social assistance	40 834	43 886	47 928	51 088	55 555	60 818	66 686	70 548	74 679
Arts and recreation services	7 040	7 281	8 105	8 450	8 630	8 739	9 429	9 798	9 896
Other services	15 166	16 228	17 803	18 624	19 095	18 847	19 630	20 968	21 567
Ownership of dwellings	57 816	59 212	61 510	64 392	67 428	71 154	79 734	91 795	100 718
GROSS VALUE ADDED, at basic prices	695 169	733 755	790 407	851 108	922 463	1 007 030	1 095 800	1 171 901	1 197 780
— nil or rounded to zero (including null cells) (b) Excludes Ownership of dwellings. (a) See Appendix 2 for a correspondance between tourism related industries and the Australian and New Zealand Standard Industrial Classification (ANZSIC). (c) Source: Australian System of National Accounts, 2009-10 (cat. no. 5204.0).									

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

TOURISM SHARE OF INDUSTRY GROSS VALUE ADDED (%) (b)

Agriculture, forestry and fishing	—	—	—	—	—	—	—	—	—
Mining	—	—	—	—	—	—	—	—	—
Manufacturing	—	—	—	—	—	—	—	—	—
Electricity, gas, water and waste services	—	—	—	—	—	—	—	—	—
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	—	—	—	—	—	—	—	—	—
Retail trade	9.3	9.4	8.6	8.4	8.2	8.0	7.7	7.4	7.6
Accommodation and food services	40.8	41.4	36.9	36.0	35.6	36.8	38.5	37.3	37.1
Transport, postal and warehousing	14.1	14.3	13.2	12.4	12.7	12.3	11.8	11.0	10.7
Information media and telecommunications	1.9	1.9	1.7	1.4	1.4	1.3	1.3	1.3	1.4
Financial and insurance services	0.1	0.1	0.1	0.1	0.1	—	—	—	0.1
Rental, hiring and real estate services(c)	2.5	2.1	2.2	2.2	2.2	2.2	2.0	2.0	2.3
Professional, scientific and technical services	—	—	—	—	—	—	—	—	—
Administrative and support services	7.9	7.5	6.9	6.4	6.4	5.9	5.6	5.6	5.4
Public administration and safety	—	—	—	—	—	—	—	—	—
Education and training	3.9	3.7	4.1	4.1	3.9	4.0	4.3	4.6	4.7
Health care and social assistance	1.4	1.4	1.2	1.0	0.9	0.8	0.8	0.8	0.8
Arts and recreation services	14.2	13.9	13.8	13.4	12.3	12.4	12.0	12.2	13.0
Other services	1.5	1.4	1.3	1.1	1.1	1.1	1.1	1.0	1.1
Ownership of dwellings	2.6	2.6	2.5	2.7	2.7	2.7	2.7	2.6	2.6
TOTAL	3.3	3.3	3.1	2.9	2.8	2.8	2.7	2.6	2.6

— nil or rounded to zero (including null cells)

(b) Also referred to as the tourism industry ratio.

(a) See Appendix 2 for a correspondance between tourism related industries and the Australian and New Zealand Standard Industrial Classification (ANZSIC).

(c) Excludes Ownership of dwellings.

INTERNAL TOURISM CONSUMPTION, By tourism related product—Purchasers' prices

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
INTERNAL TOURISM EXPENDITURE									
Tourism characteristic products									
Accommodation services	6 847	7 087	7 213	7 577	8 135	9 280	10 241	10 194	10 298
Actual and imputed rent on dwellings	1 091	1 139	1 121	1 290	1 337	1 428	1 577	1 710	1 822
Takeaway and restaurant meals(a)	11 758	12 283	11 826	11 980	12 452	13 162	14 105	13 657	14 166
Taxi fares	577	565	616	597	690	846	826	740	803
Local area passenger transportation	446	452	463	465	505	598	630	638	675
Long distance passenger transportation(b)	12 903	12 616	12 458	13 109	14 065	15 083	15 452	14 594	14 591
Motor vehicle hire and lease	1 028	1 071	1 099	1 141	1 264	1 389	1 376	1 393	1 505
Travel agency and tour operator services	2 202	2 215	2 225	2 225	2 494	2 687	2 802	2 684	2 655
Recreational, cultural and sporting services	1 970	2 032	2 167	2 144	1 836	1 970	2 039	2 133	2 425
Gambling and betting services	914	922	1 098	1 152	1 228	1 260	1 307	1 323	1 310
<i>Total tourism characteristic products</i>	<i>39 738</i>	<i>40 382</i>	<i>40 285</i>	<i>41 680</i>	<i>44 004</i>	<i>47 704</i>	<i>50 354</i>	<i>49 067</i>	<i>50 249</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	10 356	10 817	10 800	10 849	10 646	10 726	11 191	11 366	11 270
Food products	4 853	5 054	5 040	4 950	5 407	5 903	6 096	6 152	6 178
Alcoholic beverages and other beverages	3 277	3 420	3 320	3 424	3 631	4 031	4 041	3 854	3 926
Motor vehicles, caravans, boats, etc	1 143	1 352	1 452	1 794	2 034	2 151	2 279	1 942	2 137
Fuel (petrol, diesel)	5 692	5 828	5 612	5 810	6 681	7 530	7 801	7 714	7 345
Repair and maintenance of motor vehicles	450	427	433	405	415	437	429	411	464
Education services	1 577	1 591	1 876	2 031	2 091	2 240	2 507	2 895	3 090
<i>Total tourism connected products</i>	<i>27 348</i>	<i>28 488</i>	<i>28 534</i>	<i>29 263</i>	<i>30 905</i>	<i>33 018</i>	<i>34 344</i>	<i>34 334</i>	<i>34 410</i>
Other tourism goods and services	2 875	3 077	2 944	2 540	2 607	2 227	2 432	2 497	2 759
TOTAL	69 960	71 948	71 763	73 483	77 516	82 949	87 130	85 898	87 419
IMPUTED CONSUMPTION									
Tourism characteristic products									
Accommodation services	—	—	—	—	—	—	—	—	—
Actual and imputed rent on dwellings	876	884	925	991	1 095	1 196	1 342	1 524	1 674
Takeaway and restaurant meals(a)	—	—	—	—	—	—	—	—	—
Taxi fares	—	—	—	—	—	—	—	—	—
Local area passenger transportation	—	—	—	—	—	—	—	—	—
Long distance passenger transportation(b)	—	—	—	—	—	—	—	—	—
Motor vehicle hire and lease	—	—	—	—	—	—	—	—	—
Travel agency and tour operator services	—	—	—	—	—	—	—	—	—
Recreational, cultural and sporting services	717	687	794	836	879	905	957	1 064	1 083
Gambling and betting services	—	—	—	—	—	—	—	—	—
<i>Total tourism characteristic products</i>	<i>1 593</i>	<i>1 571</i>	<i>1 719</i>	<i>1 827</i>	<i>1 974</i>	<i>2 101</i>	<i>2 299</i>	<i>2 588</i>	<i>2 757</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	1 093	1 181	1 290	1 303	1 240	1 348	1 334	1 324	1 321
Food products	939	1 013	1 089	1 082	1 073	1 205	1 186	1 211	1 353
Alcoholic beverages and other beverages	267	283	307	320	315	346	342	346	340
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—	—	—	—
Fuel (petrol, diesel)	—	—	—	—	—	—	—	—	—
Repair and maintenance of motor vehicles	—	—	—	—	—	—	—	—	—
Education services	—	—	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>2 299</i>	<i>2 477</i>	<i>2 685</i>	<i>2 705</i>	<i>2 628</i>	<i>2 898</i>	<i>2 863</i>	<i>2 882</i>	<i>3 014</i>
Other tourism goods and services	299	325	353	374	369	387	395	388	376
TOTAL	4 190	4 373	4 758	4 906	4 972	5 386	5 557	5 858	6 147

— nil or rounded to zero (including null cells)

(a) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(b) Includes expenditure on outbound and inbound services provided by Australian international carriers.

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
TOTAL INTERNAL TOURISM CONSUMPTION									
Tourism characteristic products									
Accommodation services	6 847	7 087	7 213	7 577	8 135	9 280	10 241	10 194	10 298
Actual and imputed rent on dwellings	1 967	2 023	2 046	2 282	2 432	2 624	2 919	3 234	3 496
Takeaway and restaurant meals(a)	11 758	12 283	11 826	11 980	12 452	13 162	14 105	13 657	14 166
Taxi fares	577	565	616	597	690	846	826	740	803
Local area passenger transportation	446	452	463	465	505	598	630	638	675
Long distance passenger transportation(b)	12 903	12 616	12 458	13 109	14 065	15 083	15 452	14 594	14 591
Motor vehicle hire and lease	1 028	1 071	1 099	1 141	1 264	1 389	1 376	1 393	1 505
Travel agency and tour operator services	2 202	2 215	2 225	2 225	2 494	2 687	2 802	2 684	2 655
Recreational, cultural and sporting services	2 687	2 719	2 961	2 980	2 715	2 875	2 997	3 197	3 507
Gambling and betting services	914	922	1 098	1 152	1 228	1 260	1 307	1 323	1 310
<i>Total tourism characteristic products</i>	<i>41 331</i>	<i>41 953</i>	<i>42 004</i>	<i>43 507</i>	<i>45 979</i>	<i>49 806</i>	<i>52 653</i>	<i>51 655</i>	<i>53 006</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	11 449	11 998	12 090	12 152	11 886	12 074	12 525	12 690	12 591
Food products	5 792	6 067	6 129	6 032	6 480	7 107	7 282	7 364	7 532
Alcoholic beverages and other beverages	3 544	3 703	3 627	3 744	3 946	4 377	4 383	4 200	4 265
Motor vehicles, caravans, boats, etc	1 143	1 352	1 452	1 794	2 034	2 151	2 279	1 942	2 137
Fuel (petrol, diesel)	5 692	5 828	5 612	5 810	6 681	7 530	7 801	7 714	7 345
Repair and maintenance of motor vehicles	450	427	433	405	415	437	429	411	464
Education services	1 577	1 591	1 876	2 031	2 091	2 240	2 507	2 895	3 090
<i>Total tourism connected products</i>	<i>29 646</i>	<i>30 965</i>	<i>31 220</i>	<i>31 968</i>	<i>33 533</i>	<i>35 917</i>	<i>37 206</i>	<i>37 216</i>	<i>37 424</i>
Other tourism goods and services	3 174	3 403	3 297	2 914	2 976	2 613	2 827	2 885	3 135
TOTAL	74 150	76 321	76 521	78 390	82 488	88 336	92 687	91 756	93 566

(a) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(b) Includes expenditure on outbound and inbound services provided by Australian international carriers.

INTERNAL TOURISM CONSUMPTION, By type of visitor by tourism related product—Purchasers' Prices

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
DOMESTIC HOUSEHOLDS (a)									
Tourism characteristic products									
Accommodation services	2 998	3 210	3 185	3 435	3 644	4 236	4 876	4 833	5 090
Actual and imputed rent on dwellings	1 679	1 701	1 672	1 874	1 989	2 156	2 398	2 671	2 829
Takeaway and restaurant meals(b)	8 573	9 042	8 599	8 645	9 012	9 464	10 106	9 699	10 150
Taxi fares	178	171	189	186	225	282	265	218	244
Local area passenger transportation	154	158	148	155	189	249	255	249	299
Long distance passenger transportation(c)	4 196	4 397	4 640	4 739	5 227	6 126	6 495	6 003	6 515
Motor vehicle hire and lease	506	517	566	603	654	724	714	750	870
Travel agency and tour operator services	1 316	1 344	1 338	1 332	1 540	1 688	1 770	1 694	1 709
Recreational, cultural and sporting services	2 327	2 363	2 539	2 629	2 385	2 508	2 579	2 762	3 074
Gambling and betting services	688	730	791	854	911	998	989	1 014	1 016
<i>Total tourism characteristic products</i>	<i>22 617</i>	<i>23 632</i>	<i>23 667</i>	<i>24 452</i>	<i>25 775</i>	<i>28 430</i>	<i>30 447</i>	<i>29 893</i>	<i>31 796</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	8 926	9 609	9 608	9 712	9 548	9 514	9 898	9 869	9 818
Food products	4 404	4 687	4 560	4 485	4 858	5 285	5 383	5 388	5 422
Alcoholic beverages and other beverages	2 575	2 700	2 534	2 642	2 779	3 049	3 003	2 819	2 829
Motor vehicles, caravans, boats, etc	940	1 173	1 270	1 588	1 662	1 809	1 925	1 569	1 716
Fuel (petrol, diesel)	4 067	4 210	3 992	4 388	5 159	5 892	6 087	6 018	5 724
Repair and maintenance of motor vehicles	392	377	340	311	317	349	335	316	366
Education services	97	104	115	125	133	142	148	169	194
<i>Total tourism connected products</i>	<i>21 401</i>	<i>22 860</i>	<i>22 420</i>	<i>23 250</i>	<i>24 456</i>	<i>26 041</i>	<i>26 779</i>	<i>26 149</i>	<i>26 069</i>
Other tourism goods and services	2 436	2 720	2 607	2 195	2 199	1 802	1 895	1 877	2 155
TOTAL	46 453	49 212	48 694	49 898	52 431	56 273	59 120	57 919	60 021
DOMESTIC BUSINESS/GOVERNMENT (a)									
Tourism characteristic products									
Accommodation services	1 607	1 735	1 745	1 852	1 952	2 129	2 205	2 062	2 083
Actual and imputed rent on dwellings	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(b)	1 484	1 566	1 382	1 453	1 487	1 507	1 671	1 573	1 618
Taxi fares	258	247	246	240	287	343	320	266	296
Local area passenger transportation	21	21	19	19	25	29	29	28	34
Long distance passenger transportation(c)	3 278	2 970	2 783	3 104	3 649	3 814	3 845	3 557	3 670
Motor vehicle hire and lease	230	258	218	235	249	244	241	253	256
Travel agency and tour operator services	545	557	585	583	663	728	760	717	735
Recreational, cultural and sporting services	—	—	—	—	—	—	—	—	—
Gambling and betting services	—	—	—	—	—	—	—	—	—
<i>Total tourism characteristic products</i>	<i>7 423</i>	<i>7 355</i>	<i>6 979</i>	<i>7 486</i>	<i>8 313</i>	<i>8 795</i>	<i>9 071</i>	<i>8 456</i>	<i>8 693</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	—	—	—	—	—	—	—	—	—
Food products	190	202	227	224	245	218	223	227	229
Alcoholic beverages and other beverages	308	318	313	340	372	401	400	371	373
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—	—	—	—
Fuel (petrol, diesel)	1 401	1 406	1 380	1 159	1 205	1 279	1 318	1 298	1 224
Repair and maintenance of motor vehicles	37	35	74	72	72	65	63	59	68
Education services	41	44	52	56	57	56	59	66	74
<i>Total tourism connected products</i>	<i>1 978</i>	<i>2 005</i>	<i>2 047</i>	<i>1 851</i>	<i>1 951</i>	<i>2 020</i>	<i>2 063</i>	<i>2 021</i>	<i>1 968</i>
Other tourism goods and services	38	40	50	56	45	49	52	52	58
TOTAL	9 439	9 400	9 075	9 394	10 308	10 864	11 186	10 529	10 719

— nil or rounded to zero (including null cells)

(a) Includes expenditure by outbound Australian residents within Australia before/after international trips.

(b) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.

INTERNAL TOURISM CONSUMPTION, By type of visitor by tourism related product—Purchasers' Prices *continued*

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10

	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m

INTERNATIONAL

Tourism characteristic products									
Accommodation services	2 242	2 142	2 282	2 290	2 539	2 915	3 160	3 300	3 125
Actual and imputed rent on dwellings	288	322	374	408	444	469	521	563	667
Takeaway and restaurant meals(a)	1 702	1 675	1 845	1 881	1 953	2 192	2 328	2 386	2 398
Taxi fares	141	147	181	171	178	220	241	256	263
Local area passenger transportation	271	272	296	291	292	320	346	361	341
Long distance passenger transportation(b)	5 429	5 249	5 035	5 266	5 189	5 143	5 112	5 034	4 406
Motor vehicle hire and lease	292	296	315	302	361	421	420	389	379
Travel agency and tour operator services	340	315	302	310	291	271	272	273	211
Recreational, cultural and sporting services	361	357	422	351	330	368	418	435	433
Gambling and betting services	226	192	306	298	316	262	318	309	293
<i>Total tourism characteristic products</i>	<i>11 292</i>	<i>10 967</i>	<i>11 359</i>	<i>11 569</i>	<i>11 891</i>	<i>12 580</i>	<i>13 136</i>	<i>13 307</i>	<i>12 517</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	2 523	2 389	2 481	2 440	2 338	2 559	2 627	2 822	2 773
Food products	1 197	1 178	1 342	1 323	1 377	1 604	1 675	1 749	1 881
Alcoholic beverages and other beverages	661	685	780	762	795	928	980	1 011	1 064
Motor vehicles, caravans, boats, etc	203	179	182	207	373	342	354	373	420
Fuel (petrol, diesel)	224	211	240	264	317	359	396	398	396
Repair and maintenance of motor vehicles	21	15	19	22	26	23	31	35	30
Education services	1 438	1 443	1 709	1 850	1 901	2 041	2 299	2 660	2 822
<i>Total tourism connected products</i>	<i>6 268</i>	<i>6 099</i>	<i>6 753</i>	<i>6 867</i>	<i>7 125</i>	<i>7 856</i>	<i>8 364</i>	<i>9 046</i>	<i>9 387</i>
Other tourism goods and services	699	643	640	662	733	762	880	956	921
TOTAL	18 259	17 709	18 752	19 098	19 749	21 199	22 380	23 309	22 826

TOTAL

Tourism characteristic products									
Accommodation services	6 847	7 087	7 213	7 577	8 135	9 280	10 241	10 194	10 298
Actual and imputed rent on dwellings	1 967	2 023	2 046	2 282	2 432	2 624	2 919	3 234	3 496
Takeaway and restaurant meals(a)	11 758	12 283	11 826	11 980	12 452	13 162	14 105	13 657	14 166
Taxi fares	577	565	616	597	690	846	826	740	803
Local area passenger transportation	446	452	463	465	505	598	630	638	675
Long distance passenger transportation(b)	12 903	12 616	12 458	13 109	14 065	15 083	15 452	14 594	14 591
Motor vehicle hire and lease	1 028	1 071	1 099	1 141	1 264	1 389	1 376	1 393	1 505
Travel agency and tour operator services	2 202	2 215	2 225	2 225	2 494	2 687	2 802	2 684	2 655
Recreational, cultural and sporting services	2 687	2 719	2 961	2 980	2 715	2 875	2 997	3 197	3 507
Gambling and betting services	914	922	1 098	1 152	1 228	1 260	1 307	1 323	1 310
<i>Total tourism characteristic products</i>	<i>41 331</i>	<i>41 953</i>	<i>42 004</i>	<i>43 507</i>	<i>45 979</i>	<i>49 806</i>	<i>52 653</i>	<i>51 655</i>	<i>53 006</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	11 449	11 998	12 090	12 152	11 886	12 074	12 525	12 690	12 591
Food products	5 792	6 067	6 129	6 032	6 480	7 107	7 282	7 364	7 532
Alcoholic beverages and other beverages	3 544	3 703	3 627	3 744	3 946	4 377	4 383	4 200	4 265
Motor vehicles, caravans, boats, etc	1 143	1 352	1 452	1 794	2 034	2 151	2 279	1 942	2 137
Fuel (petrol, diesel)	5 692	5 828	5 612	5 810	6 681	7 530	7 801	7 714	7 345
Repair and maintenance of motor vehicles	450	427	433	405	415	437	429	411	464
Education services	1 577	1 591	1 876	2 031	2 091	2 240	2 507	2 895	3 090
<i>Total tourism connected products</i>	<i>29 646</i>	<i>30 965</i>	<i>31 220</i>	<i>31 968</i>	<i>33 533</i>	<i>35 917</i>	<i>37 206</i>	<i>37 216</i>	<i>37 424</i>
Other tourism goods and services	3 174	3 403	3 297	2 914	2 976	2 613	2 827	2 885	3 135
TOTAL	74 150	76 321	76 521	78 390	82 488	88 336	92 687	91 756	93 566

(a) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(b) Includes expenditure on outbound and inbound services provided by Australian international carriers.

AVERAGE INTERNAL TOURISM CONSUMPTION, By type of visitor by tourism related product—Purchasers' prices

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	\$	\$	\$	\$	\$	\$	\$	\$	\$
DOMESTIC (a)									
Tourism characteristic products									
Accommodation services	21.2	22.6	23.2	26.0	27.5	30.0	33.7	33.1	33.0
Actual and imputed rent on dwellings	7.7	7.8	7.9	9.2	9.8	10.1	11.4	12.8	13.0
Takeaway and restaurant meals(b)	46.3	48.6	47.0	49.7	51.6	51.7	56.0	54.1	54.1
Taxi fares	2.0	1.9	2.0	2.1	2.5	2.9	2.8	2.3	2.5
Local area passenger transportation	0.8	0.8	0.8	0.9	1.0	1.3	1.4	1.3	1.5
Long distance passenger transportation(c)	34.4	33.7	35.0	38.6	43.6	46.8	49.2	45.8	46.9
Motor vehicle hire and lease	3.4	3.5	3.7	4.1	4.4	4.6	4.5	4.8	5.2
Travel agency and tour operator services	8.6	8.7	9.1	9.4	10.8	11.4	12.0	11.6	11.2
Recreational, cultural and sporting services	10.7	10.8	12.0	12.9	11.7	11.8	12.3	13.2	14.1
Gambling and betting services	3.2	3.3	3.7	4.2	4.5	4.7	4.7	4.9	4.7
<i>Total tourism characteristic products</i>	<i>138.2</i>	<i>141.8</i>	<i>144.4</i>	<i>157.1</i>	<i>167.5</i>	<i>175.3</i>	<i>188.1</i>	<i>183.9</i>	<i>186.3</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	41.1	44.0	45.3	47.8	46.9	44.8	47.1	47.3	45.2
Food products	21.1	22.4	22.6	23.2	25.1	25.9	26.7	26.9	26.0
Alcoholic beverages and other beverages	13.3	13.8	13.4	14.7	15.5	16.2	16.2	15.3	14.7
Motor vehicles, caravans, boats, etc	4.3	5.4	6.0	7.8	8.2	8.5	9.2	7.5	7.9
Fuel (petrol, diesel)	25.2	25.7	25.3	27.3	31.3	33.8	35.2	35.1	32.0
Repair and maintenance of motor vehicles	2.0	1.9	2.0	1.9	1.9	1.9	1.9	1.8	2.0
Education services	0.6	0.7	0.8	0.9	0.9	0.9	1.0	1.1	1.2
<i>Total tourism connected products</i>	<i>107.6</i>	<i>113.8</i>	<i>115.3</i>	<i>123.5</i>	<i>129.7</i>	<i>132.1</i>	<i>137.3</i>	<i>135.1</i>	<i>129.0</i>
Other tourism goods and services	11.4	12.6	12.5	11.1	11.0	8.7	9.3	9.3	10.2
TOTAL	257.2	268.3	272.2	291.6	308.2	316.1	334.6	328.3	325.4
INTERNATIONAL									
Tourism characteristic products									
Accommodation services	470.1	460.1	451.3	423.4	462.9	516.7	561.3	595.5	549.0
Actual and imputed rent on dwellings	60.4	69.2	74.0	75.4	80.9	83.1	92.5	101.6	117.2
Takeaway and restaurant meals(b)	356.9	359.8	364.8	347.9	356.1	388.5	413.5	430.6	421.3
Taxi fares	29.5	31.5	35.7	31.7	32.4	39.0	42.8	46.3	46.3
Local area passenger transportation	56.9	58.4	58.6	53.8	53.2	56.8	61.4	65.2	60.0
Long distance passenger transportation(c)	1 138.6	1 127.4	995.6	973.6	946.1	911.8	908.1	908.5	773.9
Motor vehicle hire and lease	61.2	63.5	62.4	55.9	65.9	74.6	74.6	70.3	66.6
Travel agency and tour operator services	71.3	67.6	59.7	57.3	53.0	48.0	48.4	49.2	37.1
Recreational, cultural and sporting services	75.6	76.6	83.5	64.9	60.2	65.2	74.2	78.4	76.1
Gambling and betting services	47.4	41.3	60.6	55.1	57.7	46.5	56.5	55.8	51.5
<i>Total tourism characteristic products</i>	<i>2 368.0</i>	<i>2 355.5</i>	<i>2 246.1</i>	<i>2 139.1</i>	<i>2 168.3</i>	<i>2 230.1</i>	<i>2 333.4</i>	<i>2 401.4</i>	<i>2 198.9</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	529.2	513.1	490.7	451.1	426.3	453.7	466.7	509.2	487.2
Food products	251.1	252.9	265.5	244.7	251.1	284.2	297.6	315.6	330.4
Alcoholic beverages and other beverages	138.7	147.2	154.2	140.9	144.9	164.4	174.2	182.4	186.8
Motor vehicles, caravans, boats, etc	42.5	38.4	36.1	38.2	67.9	60.6	62.8	67.2	73.9
Fuel (petrol, diesel)	47.0	45.3	47.4	48.8	57.8	63.7	70.4	71.8	69.7
Repair and maintenance of motor vehicles	4.4	3.2	3.7	4.0	4.7	4.1	5.5	6.3	5.3
Education services	301.6	309.9	337.9	342.0	346.6	361.9	408.5	480.0	495.7
<i>Total tourism connected products</i>	<i>1 314.4</i>	<i>1 310.1</i>	<i>1 335.4</i>	<i>1 269.6</i>	<i>1 299.3</i>	<i>1 392.6</i>	<i>1 485.8</i>	<i>1 632.5</i>	<i>1 649.0</i>
Other tourism goods and services	146.7	138.0	126.6	122.5	133.6	135.1	156.4	172.6	161.9
TOTAL	3 829.2	3 803.6	3 708.0	3 531.2	3 601.2	3 757.9	3 975.6	4 206.5	4 009.8

(a) Includes expenditure by outbound Australian residents within Australia before/after international trips.

(b) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.

AVERAGE INTERNAL TOURISM CONSUMPTION, By type of visitor by tourism related product—Purchasers' prices *continued*

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	\$	\$	\$	\$	\$	\$	\$	\$	\$
TOTAL									
Tourism characteristic products									
Accommodation services	30.8	31.8	33.2	36.3	38.9	42.6	47.5	47.6	46.2
Actual and imputed rent on dwellings	8.9	9.1	9.4	10.9	11.6	12.0	13.5	15.1	15.7
Takeaway and restaurant meals(a)	52.9	55.0	54.4	57.4	59.6	60.4	65.4	63.8	63.5
Taxi fares	2.6	2.5	2.8	2.9	3.3	3.9	3.8	3.5	3.6
Local area passenger transportation	2.0	2.0	2.1	2.2	2.4	2.7	2.9	3.0	3.0
Long distance passenger transportation(b)	58.1	56.5	57.3	62.8	67.3	69.2	71.6	68.2	65.4
Motor vehicle hire and lease	4.6	4.8	5.1	5.5	6.0	6.4	6.4	6.5	6.7
Travel agency and tour operator services	9.9	9.9	10.2	10.7	11.9	12.3	13.0	12.5	11.9
Recreational, cultural and sporting services	12.1	12.2	13.6	14.3	13.0	13.2	13.9	14.9	15.7
Gambling and betting services	4.1	4.1	5.1	5.5	5.9	5.8	6.1	6.2	5.9
<i>Total tourism characteristic products</i>	<i>186.1</i>	<i>188.0</i>	<i>193.3</i>	<i>208.4</i>	<i>220.0</i>	<i>228.4</i>	<i>244.1</i>	<i>241.3</i>	<i>237.6</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	51.5	53.8	55.6	58.2	56.9	55.4	58.1	59.3	56.4
Food products	26.1	27.2	28.2	28.9	31.0	32.6	33.8	34.4	33.8
Alcoholic beverages and other beverages	16.0	16.6	16.7	17.9	18.9	20.1	20.3	19.6	19.1
Motor vehicles, caravans, boats, etc	5.1	6.1	6.7	8.6	9.7	9.9	10.6	9.1	9.6
Fuel (petrol, diesel)	25.6	26.1	25.8	27.8	32.0	34.5	36.2	36.0	32.9
Repair and maintenance of motor vehicles	2.0	1.9	2.0	1.9	2.0	2.0	2.0	1.9	2.1
Education services	7.1	7.1	8.6	9.7	10.0	10.3	11.6	13.5	13.9
<i>Total tourism connected products</i>	<i>133.5</i>	<i>138.8</i>	<i>143.7</i>	<i>153.1</i>	<i>160.4</i>	<i>164.7</i>	<i>172.5</i>	<i>173.9</i>	<i>167.8</i>
Other tourism goods and services	14.3	15.2	15.2	14.0	14.2	12.0	13.1	13.5	14.1
TOTAL	333.8	342.0	352.1	375.5	394.6	405.2	429.6	428.7	419.5

(a) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(b) Includes expenditure on outbound and inbound services provided by Australian international carriers.

DOMESTIC TOURISM CONSUMPTION, By length of stay by tourism related product—Purchasers' prices

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

TOURISM CONSUMPTION - SAME DAY (\$m)

Tourism characteristic products									
Accommodation services	—	—	—	—	—	—	—	—	—
Actual and imputed rent on dwellings	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	2 134	2 267	2 090	2 153	2 364	2 613	2 720	2 788	3 197
Taxi fares	42	42	49	36	45	61	47	42	58
Local area passenger transportation	59	60	50	58	55	87	101	107	119
Long distance passenger transportation(b)	403	341	484	318	327	444	341	345	349
Motor vehicle hire and lease	50	45	35	45	49	51	64	42	68
Travel agency and tour operator services	5	6	5	4	6	7	6	6	5
Recreational, cultural and sporting services	430	402	421	436	400	494	445	527	655
Gambling and betting services	261	277	300	323	345	378	375	384	385
<i>Total tourism characteristic products</i>	<i>3 385</i>	<i>3 440</i>	<i>3 434</i>	<i>3 373</i>	<i>3 591</i>	<i>4 137</i>	<i>4 099</i>	<i>4 241</i>	<i>4 836</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	3 593	3 781	3 662	3 753	3 811	3 967	4 200	4 151	4 465
Food products	1 065	1 177	1 035	985	1 174	1 278	1 328	1 371	1 402
Alcoholic beverages and other beverages	510	557	508	522	587	785	736	759	766
Motor vehicles, caravans, boats, etc	488	608	659	823	863	940	1 000	813	878
Fuel (petrol, diesel)	2 029	2 132	2 061	2 218	2 662	3 076	3 215	3 232	3 194
Repair and maintenance of motor vehicles	137	104	108	156	143	149	107	123	194
Education services	59	63	68	74	80	86	92	100	108
<i>Total tourism connected products</i>	<i>7 880</i>	<i>8 423</i>	<i>8 101</i>	<i>8 531</i>	<i>9 320</i>	<i>10 281</i>	<i>10 678</i>	<i>10 549</i>	<i>11 007</i>
Other tourism goods and services	720	827	960	747	817	665	675	872	875
TOTAL	11 985	12 690	12 494	12 652	13 728	15 082	15 452	15 662	16 719

AVERAGE TOURISM CONSUMPTION - SAME DAY (\$)

Tourism characteristic products									
Accommodation services	—	—	—	—	—	—	—	—	—
Actual and imputed rent on dwellings	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	15.0	15.8	15.2	16.4	18.0	18.8	19.7	19.7	21.2
Taxi fares	0.3	0.3	0.4	0.3	0.3	0.4	0.3	0.3	0.4
Local area passenger transportation	0.4	0.4	0.4	0.4	0.4	0.6	0.7	0.8	0.8
Long distance passenger transportation(b)	2.8	2.4	3.5	2.4	2.5	3.2	2.5	2.4	2.3
Motor vehicle hire and lease	0.4	0.3	0.3	0.3	0.4	0.4	0.5	0.3	0.5
Travel agency and tour operator services	—	—	—	—	—	0.1	—	—	—
Recreational, cultural and sporting services	3.0	2.8	3.1	3.3	3.0	3.6	3.2	3.7	4.3
Gambling and betting services	1.8	1.9	2.2	2.5	2.6	2.7	2.7	2.7	2.6
<i>Total tourism characteristic products</i>	<i>23.8</i>	<i>24.0</i>	<i>24.9</i>	<i>25.7</i>	<i>27.3</i>	<i>29.8</i>	<i>29.7</i>	<i>30.0</i>	<i>32.0</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	25.2	26.4	26.6	28.6	29.0	28.6	30.5	29.3	29.6
Food products	7.5	8.2	7.5	7.5	8.9	9.2	9.6	9.7	9.3
Alcoholic beverages and other beverages	3.6	3.9	3.7	4.0	4.5	5.7	5.3	5.4	5.1
Motor vehicles, caravans, boats, etc	3.4	4.2	4.8	6.3	6.6	6.8	7.2	5.7	5.8
Fuel (petrol, diesel)	14.3	14.9	14.9	16.9	20.2	22.2	23.3	22.9	21.2
Repair and maintenance of motor vehicles	1.0	0.7	0.8	1.2	1.1	1.1	0.8	0.9	1.3
Education services	0.4	0.4	0.5	0.6	0.6	0.6	0.7	0.7	0.7
<i>Total tourism connected products</i>	<i>55.4</i>	<i>58.8</i>	<i>58.7</i>	<i>65.1</i>	<i>70.8</i>	<i>74.1</i>	<i>77.4</i>	<i>74.6</i>	<i>72.9</i>
Other tourism goods and services	5.1	5.8	7.0	5.7	6.2	4.8	4.9	6.2	5.8
TOTAL	84.2	88.6	90.6	96.5	104.3	108.7	112.1	110.7	110.7

— nil or rounded to zero (including null cells)

(a) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(b) Includes expenditure by outbound Australian residents on services provided by Australian international carriers.

DOMESTIC TOURISM CONSUMPTION, By length of stay by tourism related product—Purchasers' prices *continued*

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

TOURISM CONSUMPTION - OVERNIGHT (\$m) (a)

Tourism characteristic products									
Accommodation services	4 605	4 945	4 931	5 287	5 596	6 365	7 081	6 894	7 173
Actual and imputed rent on dwellings	1 679	1 701	1 672	1 874	1 989	2 156	2 398	2 671	2 829
Takeaway and restaurant meals(b)	7 923	8 340	7 891	7 945	8 135	8 358	9 057	8 483	8 571
Taxi fares	394	376	386	390	467	564	538	442	482
Local area passenger transportation	116	120	116	116	158	191	184	170	214
Long distance passenger transportation(c)	7 071	7 027	6 939	7 525	8 549	9 496	9 998	9 215	9 837
Motor vehicle hire and lease	686	730	749	793	854	917	892	961	1 058
Travel agency and tour operator services	1 857	1 894	1 918	1 912	2 197	2 408	2 524	2 406	2 439
Recreational, cultural and sporting services	1 896	1 960	2 118	2 194	1 985	2 014	2 134	2 236	2 420
Gambling and betting services	428	453	491	530	566	620	614	630	631
<i>Total tourism characteristic products</i>	<i>26 654</i>	<i>27 547</i>	<i>27 212</i>	<i>28 565</i>	<i>30 496</i>	<i>33 089</i>	<i>35 419</i>	<i>34 108</i>	<i>35 653</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	5 333	5 827	5 946	5 959	5 738	5 547	5 697	5 718	5 353
Food products	3 530	3 712	3 752	3 724	3 928	4 226	4 279	4 244	4 249
Alcoholic beverages and other beverages	2 373	2 461	2 339	2 460	2 564	2 665	2 667	2 431	2 436
Motor vehicles, caravans, boats, etc	453	564	611	764	799	870	925	756	838
Fuel (petrol, diesel)	3 439	3 485	3 311	3 329	3 702	4 095	4 190	4 084	3 754
Repair and maintenance of motor vehicles	292	308	307	227	246	265	291	253	240
Education services	80	85	100	108	109	112	115	135	160
<i>Total tourism connected products</i>	<i>15 499</i>	<i>16 443</i>	<i>16 366</i>	<i>16 570</i>	<i>17 087</i>	<i>17 780</i>	<i>18 164</i>	<i>17 621</i>	<i>17 030</i>
Other tourism goods and services	1 754	1 933	1 697	1 505	1 426	1 186	1 272	1 057	1 338
TOTAL	43 907	45 922	45 275	46 640	49 010	52 055	54 855	52 785	54 021

AVERAGE TOURISM CONSUMPTION - OVERNIGHT (\$) (a)

Tourism characteristic products									
Accommodation services	61.4	65.7	66.3	73.3	77.8	86.5	98.0	102.8	108.0
Actual and imputed rent on dwellings	22.4	22.6	22.5	26.0	27.6	29.3	33.2	39.8	42.6
Takeaway and restaurant meals(b)	105.6	110.9	106.1	110.1	113.1	113.6	125.4	126.5	129.1
Taxi fares	5.2	5.0	5.2	5.4	6.5	7.7	7.4	6.6	7.3
Local area passenger transportation	1.5	1.6	1.6	1.6	2.2	2.6	2.5	2.5	3.2
Long distance passenger transportation(c)	94.2	93.4	93.3	104.2	118.8	129.1	138.4	137.4	148.1
Motor vehicle hire and lease	9.1	9.7	10.1	11.0	11.9	12.5	12.4	14.3	15.9
Travel agency and tour operator services	24.7	25.2	25.8	26.5	30.5	32.7	34.9	35.9	36.7
Recreational, cultural and sporting services	25.3	26.1	28.5	30.4	27.6	27.4	29.5	33.3	36.4
Gambling and betting services	5.7	6.0	6.6	7.3	7.9	8.4	8.5	9.4	9.5
<i>Total tourism characteristic products</i>	<i>355.2</i>	<i>366.2</i>	<i>366.0</i>	<i>395.8</i>	<i>424.0</i>	<i>449.8</i>	<i>490.4</i>	<i>508.6</i>	<i>536.9</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	71.1	77.5	80.0	82.6	79.8	75.4	78.9	85.3	80.6
Food products	47.0	49.4	50.5	51.6	54.6	57.4	59.2	63.3	64.0
Alcoholic beverages and other beverages	31.6	32.7	31.5	34.1	35.6	36.2	36.9	36.2	36.7
Motor vehicles, caravans, boats, etc	6.0	7.5	8.2	10.6	11.1	11.8	12.8	11.3	12.6
Fuel (petrol, diesel)	45.8	46.3	44.5	46.1	51.5	55.7	58.0	60.9	56.5
Repair and maintenance of motor vehicles	3.9	4.1	4.1	3.1	3.4	3.6	4.0	3.8	3.6
Education services	1.1	1.1	1.3	1.5	1.5	1.5	1.6	2.0	2.4
<i>Total tourism connected products</i>	<i>206.5</i>	<i>218.6</i>	<i>220.1</i>	<i>229.6</i>	<i>237.5</i>	<i>241.7</i>	<i>251.5</i>	<i>262.7</i>	<i>256.5</i>
Other tourism goods and services	23.4	25.7	22.8	20.8	19.8	16.1	17.6	15.8	20.2
TOTAL	585.1	610.5	608.9	646.2	681.3	707.5	759.6	787.1	813.5

(a) Includes expenditure by outbound Australian residents within Australia before/after international trips.

(b) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.

(c) Includes expenditure by outbound Australian residents on services provided by Australian international carriers.

TOURISM CONSUMPTION BY AUSTRALIAN RESIDENTS ON OUTBOUND TRIPS

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

Domestic tourism consumption - outbound trips(a)

Purchased by businesses (\$m)	786	728	774	1 023	1 237	1 099	1 252	1 267	1 358
Purchased by households (\$m)	1 856	1 747	1 730	2 213	2 745	3 490	4 005	4 240	4 742
Total (\$m)	2 643	2 475	2 504	3 236	3 981	4 589	5 257	5 507	6 100

Outbound tourism consumption(b)

Purchased by businesses (\$m)	3 314	3 345	3 704	3 827	3 997	4 249	4 848	4 469	4 278
Purchased by households (\$m)	11 362	11 489	13 531	15 679	16 587	17 810	21 733	22 904	23 596
Total (\$m)(c)	14 675	14 834	17 234	19 506	20 583	22 059	26 580	27 374	27 874

TOTAL CONSUMPTION BY AUSTRALIAN RESIDENTS ON OUTBOUND TRIPS (\$m)

17 318 17 309 19 738 22 742 24 565 26 648 31 837 32 880 33 974

AVERAGE CONSUMPTION BY AUSTRALIAN RESIDENTS ON OUTBOUND TRIPS (\$)

5 142.0 5 255.7 5 013.5 4 953.2 5 080.7 5 197.6 5 586.1 5 627.1 5 018.1

(a) Comprises consumption by outbound Australian residents before/after international trips.

(b) Outbound tourism consumption is the consumption of an Australian resident outside of Australia while on an international trip.

(c) There are some conceptual differences between imports of tourism goods and services and imports of transport and travel services in the Balance of Payments and International Investment Position, Australia (cat. no. 5302.0)

TOURISM CONSUMPTION BY NON-RESIDENTS ON INBOUND TRIPS

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

Consumption by international visitors outside Australia as part of an inbound trip (\$m)

5 109 4 894 4 677 4 898 5 226 5 097 5 562 5 923 4 810

International tourism consumption(a)

Purchased by businesses (\$m)	2 445	2 382	2 409	2 469	2 507	2 613	2 705	2 765	2 627
Purchased by households (\$m)	15 814	15 327	16 343	16 628	17 242	18 586	19 675	20 544	20 199
Total (\$m)(b)	18 259	17 709	18 752	19 098	19 749	21 199	22 380	23 309	22 826

TOTAL CONSUMPTION BY NON-RESIDENTS ON INBOUND TRIPS (\$m)

23 368 22 603 23 430 23 995 24 976 26 296 27 942 29 232 27 636

AVERAGE CONSUMPTION BY NON-RESIDENTS ON INBOUND TRIPS (\$)

4 900.3 4 854.8 4 632.7 4 437.0 4 554.5 4 661.3 4 963.7 5 275.4 4 854.7

(a) International tourism consumption is the tourism consumption of a non-resident visitor within Australia.

(b) There are some conceptual differences between exports of tourism goods and services and exports of transport and travel services in the Balance of Payments and International Investment Position, Australia (cat. no. 5302.0)

DIRECT TOURISM EMPLOYMENT, By industry

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

Tourism characteristic and connected industries

Accommodation ('000)	76.1	77.1	70.4	74.5	73.9	72.7	73.3	69.0	71.5
Cafes, restaurants and takeaway food services ('000)	114.3	113.4	115.2	115.9	114.4	117.3	119.1	124.9	128.2
Clubs, pubs, taverns and bars ('000)	25.1	24.0	24.8	25.1	24.1	24.6	23.8	23.4	26.2
Rail transport ('000)	2.2	2.4	2.6	2.6	2.8	2.6	2.8	4.3	4.4
Road transport and transport equipment rental ('000)	20.1	19.9	21.0	19.3	19.6	20.5	21.0	21.6	20.2
Air, water and other transport ('000)	34.6	32.3	32.5	33.6	35.9	35.7	36.0	36.8	35.0
Travel agency and tour operator services ('000)	22.8	21.4	21.6	23.6	25.9	27.2	31.3	28.6	31.9
Cultural services ('000)	8.6	8.4	7.9	9.5	8.8	8.6	9.2	9.2	9.1
Casinos and other gambling services ('000)	2.1	1.9	2.0	2.1	2.2	1.9	2.2	2.3	2.4
Other sports and recreation services ('000)	15.9	17.4	18.6	17.5	19.1	18.5	18.5	19.6	18.8
Retail trade ('000)	90.4	96.2	95.4	97.4	96.8	96.2	99.4	98.3	95.9
Education and training ('000)	27.3	28.3	29.7	28.4	30.0	29.7	31.4	31.9	32.8
Tourism characteristic and connected industries ('000)	439.4	442.6	441.8	449.3	453.5	455.5	468.1	470.0	476.4
All other industries ('000)	19.7	20.2	20.5	21.2	21.8	22.6	23.2	23.6	24.1
TOTAL TOURISM EMPLOYED PERSONS ('000)	459.2	462.9	462.3	470.5	475.3	478.1	491.3	493.6	500.5
TOTAL EMPLOYED PERSONS ('000)(a)	9 190.4	9 432.1	9 577.3	9 838.3	10 139.9	10 441.0	10 759.7	10 947.1	11 084.8
TOURISM INDUSTRY SHARE OF TOTAL EMPLOYED PERSONS (%)	5.0	4.9	4.8	4.8	4.7	4.6	4.6	4.5	4.5

(a) Tourism employed persons is derived by multiplying the number of employed persons in the industry by the proportion of total value added of the industry which is related to tourism.

NUMBER OF TOURISM TRIPS, By type of visitor by length of stay

2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10

'000 '000 '000 '000 '000 '000 '000 '000 '000

Domestic

Same day	142 302	143 260	137 900	131 151	131 601	138 815	137 898	141 437	150 963
Overnight	75 047	75 216	74 356	72 179	71 934	73 571	72 219	67 066	66 404
Total domestic	217 349	218 476	212 256	203 330	203 535	212 386	210 117	208 503	217 367

International	4 768	4 656	5 057	5 408	5 484	5 641	5 629	5 541	5 692
---------------	-------	-------	-------	-------	-------	-------	-------	-------	-------

SHORT-TERM ARRIVALS BY INTERNATIONAL VISITORS, By country of residence(a)

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	787.7	793.1	926.1	1 082.0	1 090.8	1 115.1	1 121.3	1 105.5	1 123.4
Total(b)	907.5	904.7	1 047.0	1 207.9	1 221.6	1 254.8	1 265.1	1 266.9	1 290.5
North-west Europe									
France	52.0	46.3	57.3	59.0	65.6	69.9	78.0	89.4	97.5
Germany	136.8	134.0	141.0	142.4	150.4	148.7	155.2	158.7	163.0
United Kingdom	627.1	644.2	686.4	699.5	709.3	733.3	686.3	658.7	652.8
Total(b)	1 068.0	1 070.9	1 138.8	1 162.7	1 195.0	1 229.4	1 204.6	1 182.5	1 193.3
Southern & Eastern Europe									
Italy	41.1	42.5	43.7	49.5	50.8	53.3	52.8	59.1	56.2
Total(b)	101.4	98.1	106.5	117.6	122.5	134.0	141.7	154.5	148.8
Middle East & North Africa									
Total(b)	55.7	50.1	56.4	68.2	73.4	82.7	92.6	105.3	111.3
Southeast Asia									
Indonesia	94.7	86.9	91.5	82.4	81.8	85.2	93.1	95.8	118.3
Malaysia	154.3	142.4	175.3	169.0	152.5	157.1	166.0	195.1	214.3
Singapore	295.8	261.6	252.6	267.5	251.8	263.5	266.5	278.4	289.9
Thailand	80.0	75.5	78.8	79.3	74.8	77.1	84.2	77.4	83.2
Total(b)	682.7	617.7	654.1	657.1	625.7	664.0	701.1	747.5	814.3
Northeast Asia									
China (excludes SARs and Taiwan)	172.3	177.1	216.9	274.4	292.3	338.4	375.2	358.1	393.9
Hong Kong (SAR of China)	148.6	140.7	132.2	148.9	158.8	153.1	146.7	149.9	154.3
Japan	659.2	658.6	687.5	700.8	674.4	610.2	521.2	403.7	363.9
Korea	181.1	195.8	215.8	237.3	242.9	270.8	236.2	193.2	196.1
Taiwan	99.1	80.8	103.9	103.8	102.3	92.3	85.0	92.8	88.1
Total(b)	1 262.4	1 254.8	1 358.5	1 467.6	1 473.5	1 467.7	1 368.0	1 202.0	1 200.7
Southern & Central Asia									
Total(b)	62.0	55.9	71.3	79.0	99.3	112.1	135.0	151.9	166.1
The Americas									
United States of America	424.4	423.5	430.1	445.5	452.5	455.4	454.5	451.6	488.6
Total(b)	551.1	537.1	551.9	581.1	598.8	615.7	632.9	641.8	681.1
Sub-Saharan Africa									
Total(b)	73.3	62.8	72.4	66.9	74.0	80.6	88.1	88.5	86.1
Not stated	4.3	3.7	0.2	0.2	0.3	0.4	0.5	0.2	0.2
Total	4 768.3	4 655.8	5 057.2	5 408.3	5 484.1	5 641.2	5 629.4	5 541.1	5 692.4

(a) Source: Overseas Arrivals and Departures, Australia (cat. no. 3401.0).

(b) Includes other.

SHORT-TERM DEPARTURES BY AUSTRALIAN RESIDENTS, By main destination(a)

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	592.2	615.3	739.2	843.0	836.3	883.3	913.4	955.3	1 064.0
Total(b)	843.7	888.2	1 057.0	1 192.9	1 211.1	1 267.4	1 347.2	1 406.4	1 584.4
North-west Europe									
France	45.2	51.2	58.0	66.6	73.1	76.4	99.8	87.2	104.4
Germany	43.5	42.1	44.9	51.6	65.7	58.9	64.7	63.9	66.6
United Kingdom	308.0	308.9	351.4	384.9	409.3	415.2	429.5	420.2	456.2
Total(b)	478.5	492.1	550.9	609.9	661.5	669.7	723.6	692.2	755.5
Southern & Eastern Europe									
Italy	70.8	71.0	84.2	91.3	102.7	107.6	120.3	114.8	121.1
Total(b)	190.7	188.0	222.6	247.5	270.8	285.9	307.9	292.8	314.0
Middle East & North Africa									
Total(b)	76.6	76.2	118.5	122.9	142.5	135.4	164.2	190.0	200.4
Southeast Asia									
Indonesia	270.9	194.4	271.1	344.0	241.9	231.4	328.1	436.0	652.8
Malaysia	109.5	97.8	126.0	155.5	163.9	172.5	185.6	205.2	239.2
Singapore	163.2	119.1	148.4	175.9	204.7	208.3	224.4	213.7	246.2
Thailand	163.4	150.5	153.8	187.0	246.4	331.7	403.0	378.4	432.0
Total(b)	860.9	721.9	894.4	1 093.0	1 096.2	1 217.7	1 446.0	1 552.0	1 929.1
Northeast Asia									
China (excludes SARs and Taiwan)	121.3	117.9	150.2	214.2	239.9	268.5	286.7	268.0	305.9
Hong Kong (SAR of China)	142.0	114.8	140.1	173.3	190.7	200.0	215.1	200.1	211.2
Japan	71.6	72.5	79.6	96.3	100.3	114.8	142.3	143.8	160.1
Korea	23.9	24.7	27.0	28.5	30.7	30.8	35.9	37.0	40.4
Taiwan	35.4	33.2	39.4	39.4	37.2	38.5	38.6	38.4	41.3
Total(b)	396.1	364.8	438.9	554.6	602.5	656.6	726.2	695.8	765.6
Southern & Central Asia									
Total(b)	76.5	84.4	110.4	134.2	155.2	168.6	191.0	207.6	245.1
The Americas									
United States of America	276.0	287.4	342.1	394.5	437.8	450.7	491.9	500.0	634.6
Total(b)	370.8	397.9	456.7	531.8	581.2	603.3	658.3	667.1	818.0
Sub-Saharan Africa									
Total(b)	57.2	63.5	71.3	79.1	86.4	97.8	106.5	107.8	122.9
Not stated	16.9	16.3	16.1	25.3	27.6	24.7	28.6	31.5	35.6
Total	3 367.9	3 293.3	3 936.8	4 591.2	4 834.9	5 127.1	5 699.5	5 843.2	6 770.5

(a) Sources: Overseas Arrivals and Departures, Australia (cat. no. 3401.0).

(b) Includes other.

EXPLANATORY NOTES

INTRODUCTION

1 The national accounts are a comprehensive set of economic data which are fully consistent and complete within the boundary of the economic activities they cover. Gross domestic product (GDP) is perhaps the most recognisable and important economic statistic from the core national accounts. Satellite accounts allow an expansion of the national accounts for selected areas of interest while maintaining the concepts and structures of the core accounts. Satellite accounts present specific details on a particular topic (both in monetary and physical terms) in an account which is separate from, but linked to, the core accounts. Therefore, a 'tourism' satellite account (TSA) highlights tourism within the national accounting framework.

2 Implicitly, tourism is included in the core national accounts. The products purchased by visitors, and produced by suppliers, are all part of the economic activity measured in the national accounts. However, while all the products that are produced and consumed in meeting tourism demand are embedded in the core accounts, they are not readily apparent because 'tourism' is not identified as an industry or product in international statistical standards. In the *Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 edition*, underlying the Australian national accounts, industries are defined on the basis of the goods and services which they mainly produce. On the other hand, the tourism industry is defined according to the status of the consumer. That is, it is the characteristics of the consumer that determine whether the production is included within the scope of tourism.

3 A TSA provides a means by which the economic aspects of tourism can be drawn out and analysed separately within the structure of the main accounts. In fact, one of the major features of a TSA is that it is set within the context of the whole economy, so that tourism's contribution to major national accounting aggregates can be determined, and can be compared with other industries.

4 The estimates of tourism consumption and direct tourism output, value added and gross domestic product (GDP) presented in this publication are recorded at current prices, that is the prices prevailing in the period to which the observation relates. This means that changes in these estimates over time are a result of changes in prices as well as changes in the underlying level of economic activity (or volume). For example, the introduction of the Goods and Services Tax (GST) in July 2000 resulted in an increase in the current dollar value of tourism consumption and direct tourism GDP in 2000–01 and later years. An increase would have occurred even if the underlying volume of tourism services remained unchanged.

INTERNATIONAL STANDARDS

5 The concepts and methods used in the Australian TSA are based on international standards developed by an Inter-Secretariat Working Group on Tourism Statistics. This working group is comprised of the Organisation for Economic Co-operation and Development (OECD), the statistical arm of the Commission of the European Communities (Eurostat), the United Nations Statistics Division (UNSD), and the United Nations World Tourism Organisation (UNWTO). These standards have recently been updated by the United Nations World Tourism Organisation (UNWTO) and are presented in the *Tourism Satellite Account: Recommended Methodological Framework 2008*. National statistical offices such as the ABS were consulted during the development and updating of the international standards. The standards are based on the *System of National Accounts 2008* (SNA 2008), which is the prevailing international standard for national accounts statistics.

6 The OECD also released a publication in 2000, *Measuring the Role of Tourism in OECD Economies*. This publication is consistent with the international standards. However, it also includes the modelling of tourism generated employment as an extension to the TSA. The OECD manual also shows practical examples of how to compile tourism gross value added.

EXPLANATORY NOTES *continued*

DIRECT AND INDIRECT ECONOMIC IMPACTS

7 Key tourism supply measures such as direct tourism output, direct tourism gross value added, direct tourism GDP and direct tourism employment in this publication 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 a good or service.

8 In the case of goods purchased by visitors, only the retail margin contributes to key tourism supply measures. 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. The implication of this treatment is that the value added generated in the chain of supply of goods to visitors up to, but not including, the retail level will be treated as an 'indirect effect' of tourism consumption, while only the value added generated from retail trade activities provided to visitors will be considered as a direct effect.

9 Indirect effects of tourism consumption is a broader notion that includes downstream effects of tourism demand and is out of scope for the Australian TSA. For example, when a visitor buys a meal, indirect effects are generated for the food manufacturer, the transporter, the electricity company, etc., that provide the necessary inputs required to make the meal. To fully measure the indirect effects, account should also be taken of changes in incomes which may feed through to further changes in tourism demand. A full analysis of indirect effects is best done using economic modelling. Tourism Research Australia (TRA) have undertaken this work and their latest results are reported in the *Tourism's Contribution to the Australian Economy 1997-1998 to 2007-2008*.

CONCEPTS OF TOURISM *Tourism*

10 The term 'tourism' in the international standards is not restricted to leisure activity. It also includes travel for business or other reasons, such as education, provided the destination is outside the person's usual environment.

11 An important conceptual distinction concerns the difference between travel and tourism, and consequently between a traveller and a visitor. Travel is a broad concept which encompasses the activity of travellers and includes commuting to a place of work, migration and travel for business or leisure. A traveller is defined as:

'...someone who moves between different geographic locations, for any purpose and any duration.' (*International Recommendations for Tourism Statistics 2008, para 2.4*).

Visitors

12 The central statistical entity in tourism statistics is the 'visitor'. The scope of tourism in the international standards comprises the activity of visitors.

13 A visitor is defined in the international standards as:

'...a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.' (*International Recommendations for Tourism Statistics 2008, para 2.9*).

14 If a person stays in the one place for longer than one year, their centre of economic and social interest is deemed to be in that place, so they no longer qualify as a visitor.

15 The following types of persons are not considered to be visitors:

- persons for whom travel is an intrinsic part of their job, e.g., bus driver, air crew
- persons who travel for the purpose of being admitted to or detained in a residential facility such as a hospital, prison or long stay care
- persons who are travelling as part of a move to a new permanent residence
- persons who are undertaking military duties
- persons who are travelling between two parts of their usual environment.

EXPLANATORY NOTES *continued*

Types of visitors

16 Visitors can be classified into national and international visitors. National or 'domestic' visitors consist of Australian residents who travel outside their usual environment within Australia. They include both Overnight visitors (staying one or more nights at a location) and Same day visitors. International visitors are those persons who travel to a country other than that in which they have their usual residence.

17 The one year rule for length of stay for an international visitor is consistent with the principle applied in determining residency in the balance of payments, which generally requires the length of stay in an economic territory to be less than one year to qualify as a non-resident. There are some categories of individuals though that are exceptions to this one year rule in the balance of payments, in particular international students, who continue to be resident in the territory in which they were resident prior to studying abroad even if their course of study exceeds a year. The approach adopted in the Australian TSA is to include as visitors all international students undertaking short term courses with an actual length of stay of less than one year. If a student stays longer than one year (ignoring short-term interruptions to their stay, for example at vacation break), their usual environment is deemed to be the school or university, and they do not fit the definition of a visitor. However, if they travel outside their usual environment, they are considered a visitor.

18 For the purposes of measuring direct tourism gross value added and direct tourism GDP in the TSA, the consumption of Australian residents travelling overseas (outbound visitors) is excluded, except to the extent they consume domestically produced products before or after their overseas trip. This is because their consumption overseas does not relate to the value of goods and services produced within the Australian economy.

Usual environment

19 The usual environment is made up of one or more areas in which a person undertakes their regular activities such as their place of residence, place of work, place of study and other places frequently visited. The usual environment criterion has two dimensions; frequency and distance. Places that are visited on a routine basis (at least once a week) are considered part of a person's usual environment, even if the place visited is located a considerable distance from their place of residence. Further, locations up to 40 kilometres from home for Overnight trips and up to 50 kilometres from home (round trip) for day trips are included in a visitor's usual environment in the Australian TSA.

20 Although a considerable amount of tourism spending may take place within the usual environment (i.e. purchase of air tickets, tour packages, pre-paid accommodation), the consumption of most tourism services occurs outside of the usual environment. Visitors have a positive economic impact on their destination by generating additional consumption at the destination over and above that generated by the resident consumers.

Tourism expenditure

21 Tourism expenditure covers actual expenditure by the visitor, or on behalf of the visitor, and is defined in the international standards as:

'...the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others.' (*International Recommendations for Tourism Statistics 2008, para 4.2*)

22 Consistent with the definition of visitors, tourism expenditure includes expenditure by visitors whose primary purpose is business, whether this is totally or partially paid by businesses or government. Expenditure before or after the trip is likewise included provided the expenditures are related to the trip, such as the printing of photos after the return home or the purchase of tourism single-purpose consumer durables in anticipation of trips (e.g. luggage or camping equipment). Consumer durables which are

EXPLANATORY NOTES *continued*

Tourism expenditure continued

purchased on a trip (e.g. motor vehicles) are also included, even though they are not mainly for use on trips. Since there is no reliable data source in Australia for acquisitions of valuables, this item is not included in the national accounts and is also excluded from tourism expenditure in the Australian TSA.

23 Expenditures by Australians travelling abroad on goods or services provided on the Australian domestic territory, either before or after the trip, are included in tourism expenditure. In addition, outbound and inbound services provided by Australian international carriers are also included. All other expenditures by Australians while abroad are excluded from tourism expenditure, consumption and value added. These expenditures are classified as imports of goods and services.

Tourism consumption

24 Tourism consumption, as defined in the Australian TSA and the revised international standards, is broader in scope and also includes imputations for the consumption by visitors of certain services for which they do not make a payment. Imputed consumption included in the Australian TSA include:

- Services provided by one household to the visiting members of another household free of charge, including the value of goods such as food and purchased services provided by host family/friends
- Housing services provided by vacation homes on own account (imputed services of holiday homes deemed to be consumed by their visitor owners)
- Imputed values of non-market services provided directly to visitors such as public museums even though these may be provided free or at a price which is not economically significant.

25 In the Australian TSA, tourism consumption includes consumption by both domestic and international visitors. Domestic consumption is further split into that of households, business and government. This dissection is based on who incurred the expenditure rather than who actually paid. For example, a visitor may spend \$1,000 on a business trip, of which \$800 is reimbursed by the business. While the primary purpose of the trip is business, \$800 is recorded as business consumption, with the remaining \$200 reported as household consumption.

26 Some further information on particular inclusions and exclusions from tourism consumption are discussed in the 1997–98 issue of this publication.

Direct tourism gross value added and direct tourism GDP

27 Direct tourism gross value added and direct tourism GDP are the major economic aggregates derived in the TSA. The concepts are not the same and it is important to outline the differences between them.

28 Direct tourism gross value added shows only the 'value' which a producer adds to the raw material goods and services it purchases in the process of producing its own output. Direct tourism gross value added is measured as the value of the output of tourism products by industries in a direct relationship with visitors less the value of the inputs used in producing these tourism products. Output is measured at 'basic prices', that is before any taxes on tourism products are added (or any subsidies on tourism products are deducted). Taxes on tourism products include the GST, wholesale sales taxes and excise duties on goods supplied to visitors. Direct tourism gross value added is directly comparable with estimates of the gross value added of 'conventional' industries such as mining and manufacturing that are presented in the national accounts.

29 SNA 2008 states that basic price measures are to be used for comparisons between industries and across countries because it is free of the effects of taxes and subsidies on products which can vary between industries (and countries) and over time. The tax and subsidy component of a product's sale price does not represent value added by the industry producing that product.

EXPLANATORY NOTES *continued*

Direct tourism gross value added and direct tourism GDP continued

30 Direct tourism GDP, on the other hand, measures the value added of the tourism industry at purchasers' (market) prices. It therefore includes taxes paid less subsidies associated with the productive activity attributable to tourism. Direct tourism GDP will generally have a higher value than direct tourism value added. Direct tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While direct tourism GDP is useful in this context, the direct tourism gross value added measure should be used when making comparisons with other industries or between countries.

Gross fixed capital formation

31 Purchases of capital assets are excluded from tourism demand for the purposes of calculating direct tourism gross value added, as there is no direct relationship between the visitor and the acquisition of capital by the tourism industries.

32 The services that capital investment provide are captured to the extent that the price change for products implicitly include a component to cover the cost of capital. Whilst the purchase of capital by tourism industries is of significant analytical interest in its own right, data of sufficient quality are not available for publication in the Australian TSA. Collection of industry data for gross fixed capital expenditure presents a number of difficulties, one being that assets obtained under finance leasing arrangements need to be recorded in the industry of the lessee rather than the legal owner.

CLASSIFICATIONS

Tourism related products

33 Not all products and industries in the standard national accounts product and industry classifications are related to tourism. Therefore, the TSA distinguishes between products and industries that are related to tourism, and those which are not. Tourism related products and industries are further classified into tourism characteristic and tourism connected. There are three categories of industry and product in the TSA.

34 Tourism characteristic products are defined as those products which would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, core lists of tourism characteristic products, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. The core list of tourism characteristic products is consistent with the newly revised international classification of products, namely the *Central Product Classification, Version 2* (CPC V2.0).

35 It is also recommended in the international TSA standards that country-specific tourism characteristic products are identified. In the Australian TSA, for a product to be a country-specific tourism characteristic product, at least 25 per cent of the total output of the product must be consumed by visitors.

36 Tourism connected products are those that are consumed by visitors but are not considered as tourism characteristic products. All products in the supply and use table not consumed by visitors are classified as 'all other goods and services' in the TSA.

37 See Appendix 1 for a correspondence between tourism related products in the Australian TSA, and products included in the *Central Product Classification, Version 2* (CPC V2.0).

Tourism related industries

38 Tourism characteristic industries are defined as those industries that would either cease to exist in their present form, or would be significantly affected if tourism were to cease. Under the international TSA standards, core lists of tourism characteristic industries, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. The core list of tourism characteristic industries is consistent with the newly revised international classification of industries, namely the *International Standard Industrial Classification, Revision 4* (ISIC Rev. 4), which aligns closely with ANZSIC 2006.

EXPLANATORY NOTES *continued*

Tourism related industries continued

39 In the Australian TSA, for an industry to be a country-specific tourism characteristic industry, at least 25 per cent of its output must be consumed by visitors. Whether or not an industry is classified as characteristic has no effect on total value added resulting from tourism, as the TSA measures the gross value added resulting from the production of products directly consumed by visitors, not the total gross value added generated by tourism related industries.

40 Tourism connected industries are those, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) to it, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as 'all other industries', though some of their products may be consumed by visitors and are included in the calculation of direct tourism gross value added and direct tourism GDP. All remaining industries are classified as 'all other industries' in the TSA.

41 The following points are worth noting about the industry classifications for the TSA:

- whether or not an industry is classified as characteristic has no effect on total value added resulting from tourism
- for an industry to be tourism related it must serve the visitors themselves, that is, there must be a direct relationship between the provider of the product and the consumer. Producers of goods from the manufacturing industry that are not in direct contact with visitors will therefore not be included as a tourism related industry.

42 See Appendix 2 for a correspondence between tourism related industries and industries included in the *Australian and New Zealand Standard Industrial Classification* (ANZSIC).

TOURISM SATELLITE ACCOUNT FRAMEWORK

43 The supply and use tables for the Australian economy provide the framework in which data for visitor expenditure (demand) and industry output (supply) are integrated and made consistent in the TSA benchmark. Moreover, they provide the means of calculating direct tourism gross value added and direct tourism GDP. This input-output table variant provides a tool for further analysis and economic modelling of tourism.

44 The 'supply' table is a matrix showing (in the rows) the basic price values of products produced by each major industry. It also shows the supply of products from imports, and the net taxes on products and trade and transport margins required to derive supply at purchasers' prices. The 'use' table shows the use of each product, both as intermediate consumption by industries and in domestic final demand and exports. The use table also shows the primary inputs (compensation of employees and gross operating surplus) required by each industry.

45 The supply and use tables are brought to balance so that the supply of each product equals its use. The supply and use tables on which the TSA is based contain 63 industries and 298 products. To derive the TSA, it was necessary to augment the standard supply and use tables. As the objective of the TSA is to focus on tourism related products and the industries that produce them, some disaggregation of the products and industries shown in the standard tables was required. For operational convenience in constructing the TSA, the non-tourism products and industries were compressed, but the details still remain in the underlying supply and use tables.

46 An important characteristic of tourism products is that they are not uniquely defined by their nature, but by who purchases them. Therefore, the consumption of each product has to be divided into that part consumed by visitors and that part consumed by non-visitors. This information is used to partition industries into their tourism and non-tourism components, enabling the derivation of direct tourism value added and direct tourism GDP.

EXPLANATORY NOTES *continued*

TOURISM SATELLITE ACCOUNT FRAMEWORK *continued*

47 An important part of the compilation process is to check the consistency of data for visitor expenditures on products with the total supply of products. Apparent inconsistencies have to be resolved by further data investigations and adjustment.

48 More details on the supply and use approach to constructing a TSA can be found in Organisation for Economic Co-operation and Development, *Measuring the Role of Tourism in OECD Economies*, OECD, Paris, 2000. Readers who require more detailed information on supply and use tables more generally should consult SNA 2008.

CALCULATING BENCHMARK TOURISM GROSS VALUE ADDED AND TOURISM GDP

49 The gross value added for an industry is derived as the gross output for that industry less the intermediate consumption required to produce that output. However, as the tourism industry is defined according to who purchases an industry's output rather than according to the nature of the output itself, tourism consumption is required in order to measure the tourism output of industries. For the current TSA time series, benchmark years are 1997–98, 2000–01, 2003–04 and 2006–07.

50 To calculate direct tourism gross value added, a number of steps are required. These can be summarised as:

- identify which products in the economy are purchased by visitors
- derive an estimate of internal tourism consumption for each tourism product
- remove product taxes and subsidies, margins and imports from internal tourism consumption of each product at purchasers' prices to derive internal tourism consumption at basic prices—this represents the domestic output consumed by visitors
- determine what proportion of the domestic output of each product is consumed by visitors by dividing tourism consumption at basic prices into the total supply of each product at basic prices—this is the tourism product ratio
- for each tourism product, identify the industries that have a direct relationship with visitors. In the case of the supply of goods, this will only include the industries that provide retail trade services. In the case of the supply of other margins (wholesale and transport margins), all industries are deemed to not have a direct relationship with visitors.
- apply the tourism product ratio to the output of each product for those industries that have a direct relationship with visitors to derive the direct tourism output of each industry
- estimate the intermediate consumption required to produce each industry's output of tourism products using relationships in the supply and use tables. The default assumption is that there is a constant ratio of output to intermediate consumption for both tourism and non-tourism products produced by an industry
- calculate direct tourism gross value added at basic prices for each industry as direct tourism output less the intermediate consumption required to produce the direct tourism output, and sum for all industries in the economy. Direct tourism gross value added at basic prices is directly comparable to the value added for all other industries.

UPDATE METHODOLOGY

51 It is not feasible to collect the detailed supply side data required to produce a timely full scale TSA every year. However, the key aggregates can be updated annually using relationships in the benchmark TSA and demand side data that are available on a yearly basis.

52 The following steps are used in the update years:

- derive an estimate of internal tourism consumption for each tourism product
- remove product taxes and subsidies, margins and imports from internal tourism consumption of each product at purchasers' prices to derive internal tourism consumption at basic prices—this represents the domestic output consumed by visitors

EXPLANATORY NOTES *continued*

UPDATE METHODOLOGY

continued

- remove supply of goods by producers that do not have a direct relationship with visitors (equal to the cost to retailers of domestic goods sold directly to visitors) using ratios from the benchmark TSA to derive direct tourism output
- allocate the direct tourism output of each tourism product to producing industry using ratios from the benchmark TSA
- sum the products produced by each tourism industry to derive the output for each tourism industry
- split industry output between value added and intermediate consumption using each industry's input-output ratios taken from the benchmark TSA.
- sum direct tourism gross value added for all industries to calculate the tourism industry's gross value added. Direct tourism GDP is derived by adding tourism net taxes on products.

53 Where there is structural change in tourism related industries or the economy more generally in the update years, it is likely that there will be revisions when the next benchmark is compiled.

DATA SOURCES

Tourism consumption data

54 The main data sources used to compile the benchmark and the update TSA are described in this section. The 1997–98 issue of this publication provides additional information on the data sources used to compile a benchmark TSA.

55 The data sources for actual expenditures are the same for both the benchmark and updated years.

56 Most of the visitor expenditure data used in the compilation of the TSA is sourced from Tourism Research Australia (TRA) in the National Visitor Survey (NVS) for expenditure by Australian visitors and the International Visitor Survey (IVS) for expenditure by international visitors. These data are supplemented with data from the balance of payments and national accounts.

57 The international visitor consumption total is the sum of the balance of payments, transportation and travel services items adjusted for conceptual differences between the TSA and balance of payments. The conceptual differences relate to the restricted coverage in the TSA of student visitors studying in Australia; imputations for non-market services provided to overseas visitors; margins on foreign exchange transactions; and the value of products provided to overseas visitors within private households. IVS data provide the detailed product information.

58 Adjustments to the TRA data are required to break down the following broad expenditure categories for both domestic and international visitors: organised tours, package tours, conference fees, and trips with more than 21 stopovers. Given a lack of suitable direct information, these allocations are made on the basis of models or supplementary information from either ABS or TRA surveys.

59 The major imputed component in tourism consumption relates to the imputed value in 'actual and imputed rent on dwellings', where the imputed value of rent refers to the consumption of housing services provided by holiday houses to the owner. The estimate is calculated by multiplying average annual rents by the total number of holiday houses in Australia from the Census of Population and Housing.

60 An imputation for products provided to visitors in private households is derived using indicators from the ABS Household Expenditure Survey and IVS/NVS data which are moved forward using household final consumption expenditure from the National Accounts. These methods are used for both the benchmark and updated estimates.

61 For the 1997–98 TSA the imputation for non-market services provided by government utilised data on visitor numbers from *Cultural Trends in Australia* (cat. no. 4172.0), whilst the imputation for foreign exchange margins was derived using international visitors' expenditure data, and data for currency buy/sell rates. Estimates for

EXPLANATORY NOTES *continued*

Tourism consumption data continued

later years are extrapolated using movements in government final consumption expenditure on relevant products for the government imputation, and movements in the number of short term arrivals for the foreign exchange imputation.

62 Internal tourism consumption at basic prices is calculated by removing the net taxes, margins and imports from internal tourism consumption at purchasers' prices. This is done using relationships in the supply and use tables. Estimates of GST for years from 2000–01 are available from the supply and use tables. Generally a 10% GST applies to all expenditure by domestic households and international visitors, excluding expenditure on education, health, international airfares, and groceries that are GST exempt. In the update years other product taxes, subsidies, imports and margins are calculated using a variety of sources including government budget reports, balance of payments data, and retail trade data.

Relationship with balance of payments tourism related services

63 Memorandum items for credits (exports) and debits (imports) of tourism related services are included in *Balance of Payments and International Investment Position, Australia* (cat. no. 5302.0). These are derived by combining total travel services (business, education-related and other personal travel), passenger fares, and the air transport component of other transportation services which relates to agency fees and commission receipts.

64 In this publication information on Tourism Consumption by Australian Residents on Outbound Trips is presented. This table records the value of goods and services sourced from non-residents purchased by Australian residents in association with these trips. The difference in the estimates in this publication and the service debits memorandum item published in the balance of payments relate to: any transactions between residents and non-residents which do not relate to the value of tourism goods and services purchased within the Australian economic territory; expenditure by student travellers on long term visas (as they do not meet the definition of a visitor); and payments to non-resident travel agencies for services provided outside Australian territory.

65 Balance of payments tourism related services credits are closely related to exports of tourism goods and services in the estimates of the value of domestically produced goods and services presented in the Tourism Consumption by Non-residents on Inbound Trips table in this publication. The most significant differences occur because the Australian TSA excludes the expenditure of overseas students with a length of stay of greater than one year and non-resident to resident transactions which occur in other countries, i.e. delivery of services by Australian residents in other countries, both of which are included in the balance of payments. The other differences relate to the TSA imputations for non-market services provided to overseas visitors, margins on foreign exchange transactions and the value of products provided to overseas visitors within private households, these imputations are generally not recorded in the balance of payments.

Industry data

66 While the supply and use tables provide 'control totals' for industry output of products and the inputs required to produce those products, in the benchmark TSA years of 1997–98, 2000–01, 2003–04 and 2006–07 the data have to be disaggregated and rearranged to focus on tourism related products identified from tourism demand data. This has mostly been done using information from the ABS annual business surveys.

67 The ABS annual business surveys collect data for business income and expense items for all broad industry groups in the economy. These surveys were expanded in 1997–98, 2000–01, 2003–04 and 2006–07 to provide extra data for tourism characteristic industries. The ABS Economic Activity Survey (EAS), supplemented with taxation data, is the major source of data for the transport, automotive fuel, and motor vehicle hire industries. The ABS Service Industry Surveys are a major source of data for travel agents,

EXPLANATORY NOTES *continued*

Industry data continued

accommodation, cafes and restaurants, pubs and taverns, clubs, gambling industries and casinos.

68 As the TSA supply table is not updated for the extrapolated years, benchmark coefficients are carried through to the update estimates. For previously published TSA estimates benchmark coefficients from the 1997–98, 2000–01 and 2003–04 TSAs were applied to the time series. With the release of new benchmark data for 2006–07 a new set of coefficients were produced and the whole time series of TSA estimates were revised.

Employment

69 Persons employed in tourism related industries will generally provide services to both visitors and non-visitors. Tourism employment is derived for each industry by applying the tourism value added industry ratios from each of the benchmark years to employment estimates for each industry in subsequent years. The employment estimates between benchmark years are smoothed. This method of using the tourism value added industry ratios involves an assumption that the employment generated by tourism in each industry is in direct proportion to value added generated by tourism in the benchmark year.

70 Details by industry of employment are collected in the Labour Force Survey (LFS) in the February, May, August and November months. Estimates of the number of employed persons by industry and in total have been calculated as the average of these four months. Total employment is derived by adding employment in the defence forces to the civilian labour force. To the extent that the survey months exclude the major Christmas holiday period, there could be some downward bias in estimates for the tourism industries. The exceptions are the accommodation, travel agency, cafes and restaurant, clubs pubs taverns and bars, casinos and other gambling services, and air and water transport industries, where employer survey data have been used when available. Employment in these industries has been extrapolated using movements in the LFS for the updated years.

71 Some of the tourism industries in the TSA have been compressed in the tables relating to employment because the LFS is not designed to produce estimates of sufficient accuracy for some of the fine-level industries in the TSA.

Other visitor characteristics

DOMESTIC VISITORS

72 Domestic visitor numbers are sourced from the NVS. As the survey commenced in January 1998, the visitor numbers for this year have had to be extrapolated to a financial year basis (1997–98). Data for all subsequent years are based on financial year data from TRA.

INTERNATIONAL ARRIVALS AND DEPARTURES

73 Data on international arrivals and departures (by country of origin or destination) were taken from the ABS publication *Overseas Arrivals and Departures, Australia* (cat. no. 3401.0).

QUALITY OF ESTIMATES

74 While as much care as possible has been taken to ensure the quality of the estimates in the TSA, users should exercise some caution in the use and interpretation of the results. In order to produce estimates at a finer level of product and industry detail than that normally provided in the national accounts, some of the data have had to be stretched up to the limits of their design capabilities. Moreover, major tourism aggregates such as direct tourism gross value added and tourism employment are not directly observable in practice. They have to be modelled in a supply and use framework. The assumptions underlying the estimates can have an effect on their quality.

EXPLANATORY NOTES *continued*

QUALITY OF ESTIMATES

continued

75 The estimates have been prepared from a wide range of statistical sources. Some are closely related to the desired national accounting basis, but others are not. There are differences in coverage, concepts and timing. Many of the tourism industries and products identified in this publication are at a more detailed level, or do not directly concord, with the industry and product details in the national supply and use tables. While every effort has been made to improve the survey coverage of the finer level tourism industries, the accuracy of these estimates are subject to a higher degree of error than that generally pertaining to the broader level estimates published in the national accounts.

76 Tourism expenditure data are generally obtained from large scale visitor surveys and are a key component of the TSA. These surveys are scientifically designed to produce estimates of good quality but, like all sample surveys, are subject to sampling variability. The relevant NVS and IVS publications describe in detail the associated confidence intervals for a given estimate. In order to adapt the visitor survey data to the concepts and classifications required for the TSA, some dissection and rearrangement of the data has been required. While the rearrangement of the basic data can impact on the quality of tourism consumption estimates for individual products, the aggregate level of tourism consumption should not be affected, although the estimate of direct tourism gross value added could be.

77 The most significant assumption in the compilation of a TSA relates to the use of the tourism product ratios and the tourism industry ratios in the calculation of tourism related monetary and employment aggregates. The default assumption is that the input requirements of tourism and non-tourism output are identical for an industry. While this is likely to be a more valid assumption for fine level industries where industry output is relatively homogenous (such as the taxi transport industry), there will be some instances where the assumption may be less valid. This is more likely to be the case where the tourism specialisation ratio of the industry is low, and a diverse range of products are produced. However, errors resulting from the use of assumptions will tend to offset in the calculation of the broad aggregates such as direct tourism value added and direct tourism GDP.

78 In the extrapolated years the allocation of direct tourism gross output to producing industry and the derivation of direct tourism gross value added are based on relationships that applied in the benchmark years of 1997–98, 2000–01, 2003–04 and 2006–07. In compiling the 2006–07 benchmark the coefficients for the previous benchmark years, as well as the update years, were reviewed and adjusted as appropriate. The review of these coefficients for all years was required to reflect the significant revisions that were implemented in tourism international standards - Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008) and International Recommendations for Tourism Statistics 2008 (IRTS 2008) - and in the supply use tables underlying the 2008–09 release of the ASNA. Changes to the supply use tables include the international standards System of National Accounts 2008 (SNA 2008), Balance of Payments and International Investment Position Manual, sixth edition (BPM6), Standard Economic Sector Classification of Australia, 2008 (SESCA 2008) and the new industry classification, Australian and New Zealand Standard Industrial Classification, 2006 (ANZSIC 2006).

79 The underlying assumption of the three yearly benchmarking approach is that structural change occurs only slowly. The extrapolation techniques used in the TSA updates may not fully capture structural changes in the tourism industry and the Australian economy. To overcome this deficiency the benchmark coefficients can be altered in the TSA updates where there is strong evidence of structural change in tourism related industries. As the benchmark relationships are likely to become less

EXPLANATORY NOTES *continued*

QUALITY OF ESTIMATES

continued

relevant over time, extrapolated estimates only remain tenable where there is a realignment to periodic benchmarks.

80 Estimates of the number of persons employed in tourism related industries have generally been derived from the LFS. As this is a household survey, it has some deficiencies when used to derive detailed industry estimates. In order to mitigate some of these potential quality problems, estimates of employment have been published at a more aggregated industry level than that provided in the first dimension of the TSA.

81 Most figures are subject to revision as more complete and accurate information becomes available.

ABBREVIATIONS

'000	thousand
\$m	million dollars
ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
CPC V2.0	Central Product Classification V2.0
EAS	Economic Activity Survey
Eurostat	Statistical Office of the European Communities
GDP	gross domestic product
GST	goods and services tax
IRTS	International Recommendations for Tourism Statistics
IVS	International Visitor Survey
LFS	Labour Force Survey
NVS	National Visitor Survey
OECD	Organisation for Economic Co-operation and Development
RET	Department of Resources, Energy and Tourism
SNA08	System of National Accounts 2008 version
TRA	Tourism Research Australia
TSA	Tourism Satellite Account

APPENDIX 1 TOURISM PRODUCT CORRESPONDENCE

TOURISM RELATED PRODUCTS

The following table shows the correspondence between tourism related products in the Australian Tourism Satellite Account and products in the Central Product Classification, Version 2 (CPC V2.0).

APPENDIX 1 - TOURISM PRODUCT CORRESPONDENCE

<i>Characteristic and connected tourism products</i>	<i>CPC Code</i>	<i>CPC description</i>
Accommodation services	631	Accommodation services for visitors
	632	Other accommodation services for visitors and others
Actual and imputed rent on dwellings	72111	Rental or leasing services involving own or leased residential property
Takeaway and restaurant meals	633	Food serving services
	634	Beverage serving services
Taxi fares	64115	Taxi services
Local area passenger transportation	641	Local transport and sightseeing transportation services of passengers (except 64115 taxi services)
Long distance passenger transportation	642	Long distance transport services of passengers
Motor vehicle hire and lease	73111	Leasing or rental services concerning cars and light vans without operator
Travel agency and tour operator services	855	Travel arrangement, tour operator and related services (except 8553 other reservation services)
Recreational, cultural and sporting services	9622	Performing arts event production and presentation services
	963	Services of performing and other artists
	964	Museum and preservation services
	9652	Sports and recreational sports facility operation services
	9659	Other sports and recreational sports services
	966	Services of athletes and related support services
	9691	Amusement park and similar attraction services
	9699	Other recreation and amusement services n.e.c.
Gambling and betting services	9692	Gambling and betting services
Shopping (including gifts and souvenirs)	28	Knitted or crocheted fabrics; wearing apparel
	29	Leather and leather products; footwear
	322	Books, in print
	323	Newspapers and periodicals, daily, in print
	324	Newspapers and periodicals, other than daily, in print
	325	Printed maps; music, printed or in manuscript; postcards, greeting cards, pictures and plans
	327	Registers, account books, notebooks, letter pads, diaries and similar articles, blotting-pads, binders, file covers, forms and other articles of stationery of paper or paperboard
	353	Soap, cleaning preparations, perfumes and toilet preparations
	381	Furniture
	382	Jewellery and related articles
	383	Musical instruments
	384	Sports goods
	385	Games and toys
	448	Domestic appliances and parts thereof
	47	Radio, television and communication equipment and apparatus
	483	Optical instruments and photographic equipment, and parts and accessories thereof
	484	Watches and clocks, and parts thereof
	3694	Tableware, kitchenware, other household articles and toilet articles, of plastics
	3722	Ceramic household and ornamental articles
	32192	Envelopes, letter cards, plain postcards and correspondence cards of paper or paperboard; boxes, pouches, wallets and writing compendiums, of paper or paperboard, containing paper stationery
	32193	Toilet paper, handkerchiefs, towels, serviettes, napkins for babies, tampons, and similar household, sanitary or hospital articles, and articles of apparel, of paper pulp, paper, cellulose wadding or webs of cellulose fibres

APPENDIX 1 TOURISM PRODUCT CORRESPONDENCE *continued*

APPENDIX 1 - TOURISM PRODUCT CORRESPONDENCE *continued*

<i>Characteristic and connected tourism products</i>	<i>CPC Code</i>	<i>CPC description</i>
	37193	Glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes (except bottles, jars and the like, of glass, and ornaments of lamp-worked glass)
	38921	Umbrellas, sun-umbrellas, walking-sticks, seat-sticks, whips, riding-crops and the like
	38997	Imitation jewellery
	42996	Statuettes and other ornaments of base metal; photograph, picture or similar frames of base metal; mirrors of base metal
Food products	21	Meat, fish, fruit, vegetables, oils and fats
	22	Dairy products and egg products (part)
	23	Grain mill products, starches and starch products; other food products
Alcoholic beverages and other beverages	24	Beverages
	22	Dairy products and egg products (part)
Motor vehicles, caravans, boats, etc	494	Pleasure and sporting boats
	49113	Motor cars and other motor vehicles principally designed for the transport of persons (except public-transport type vehicles, vehicles specially designed for travelling on snow, and golf cars and similar vehicles)
	4922	Trailers and semi-trailers; containers
Fuel (petrol, diesel)	3331	Motor spirit (gasolene), including aviation spirit
	3336	Gas oils
	3337	Fuel oils n.e.c.
Repair and maintenance of motor vehicles	36111	New pneumatic tyres, of rubber, of a kind used on motor cars
	36112	New pneumatic tyres, of rubber, of a kind used on motorcycles or bicycles
	36113	Other new pneumatic tyres, of rubber
	3612	Retreaded pneumatic tyres, of rubber
	4641	Primary cells and primary batteries
	87141	Maintenance and repair services of motor vehicles
Education Services	92	Education services
Other tourism goods and services	250	Tobacco products
	352	Pharmaceutical products
	681	Postal and courier services
	6743	Parking lot services
	7132	Accident and health insurance services
	7133	Other non-life insurance services (excluding reinsurance services)
	7142	Accident and health reinsurance services
	7143	Other non-life reinsurance services
	7321	Leasing or rental services concerning televisions, radios, video cassette recorders and related equipment and accessories
	7322	Leasing or rental services concerning video tapes and disks
	8553	Other reservation services
	838	Photography services and photographic processing services
	841	Telephony and other telecommunications services
	842	Internet telecommunications services
	843	On-line content
	931	Human health services
	971	Washing, cleaning and dyeing services
	972	Beauty and physical well-being services

APPENDIX 2 TOURISM INDUSTRY CORRESPONDENCE

TOURISM RELATED INDUSTRIES

The following table shows the correspondence between tourism related industries in the Australian Tourism Satellite Account and industries in the Australian and New Zealand Standard Industrial Classification (ANZSIC).

APPENDIX - TOURISM INDUSTRY CORRESPONDENCE

<i>Characteristic and connected tourism industries</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>
Accommodation	44	Accommodation
Ownership of dwellings	6711	Residential property operators
Cafes, restaurants and takeaway food services	451	Cafes, restaurants and takeaway food services
Clubs, pubs, taverns and bars	452	Pubs, taverns and bars
	453	Clubs (hospitality)
Rail transport	47	Rail transport
Taxi transport	4623	Taxi and other road transport
Other road transport	461	Road freight transport
	4621	Interurban and rural bus transport
	4622	Urban bus transport (including tramway)
Air, water and other transport	48	Water transport
	49	Air and space transport
	50	Other transport
Motor vehicle hiring	6611	Passenger car rental and hiring
Travel agency and tour operator services	722	Travel agency and tour arrangement services
Cultural services	89	Heritage activities
	90	Creative and performing arts activities
Casinos and other gambling services	92	Gambling activities
Other sports and recreation services	91	Sports and recreation activities
Automotive fuel retailing	40	Fuel retailing
Other retail trade	39	Motor vehicle and motor vehicle parts retailing
	41	Food retailing
	42	Other store-based retailing
	43	Non-store retailing and retail commission based buying and/or selling
Education and training	80	Preschool and school education
	81	Tertiary education
	82	Adult, community and other education
All other industries		All other industries

APPENDIX 2 TOURISM INDUSTRY CORRESPONDENCE *continued*

TOURISM RELATED INDUSTRIES FOR EMPLOYMENT ESTIMATES

Employment estimates are provided at a more aggregate level of detail than the estimates shown in the monetary tables. The following table shows how the tourism employment industries correspond with the tourism related industries in the monetary tables.

TOURISM EMPLOYMENT INDUSTRIES

<i>Tourism employment industries</i>	<i>Tourism related industries</i>
Accommodation	Accommodation
Cafes, restaurants and takeaway food services	Cafes, restaurants and takeaway food services
Clubs, pubs, taverns and bars	Clubs, pubs, taverns and bars
Rail transport	Rail transport
Road transport and motor vehicle hiring	Taxi transport; other road transport; motor vehicle hiring
Air, water and other transport	Air, water and other transport
Travel agency and tour operator services	Travel agency and tour operator services
Cultural services	Cultural services
Casinos and other gambling services	Casinos and other gambling services
Other sports and recreation services	Other sports and recreation services
Retail trade	Other retail trade; automotive fuel retailing
Education and training	Education and training
All other industries	All other industries

GLOSSARY

Basic price	The amount receivable by the producer from the purchaser for a unit of a good or service produced as output, minus any tax payable plus any subsidy receivable, on that unit as a consequence of its production or sale; it excludes any transport charges invoiced separately by the producer. See also <i>Economically significant price</i> and <i>Purchasers' price</i> .
Business and government tourism consumption	Also referred to as internal tourism consumption by domestic business and government visitors. Consists of the tourism consumption by resident businesses or governments on tourism related products within Australia. See also <i>Tourism consumption</i> and <i>Internal tourism consumption</i> .
Compensation of employees	The total remuneration, in cash or in kind, payable by an enterprise to an employee in return for work done by the employee during the accounting period. It is further classified into two sub-components: wages and salaries; and employers' social contributions. Compensation of employees is not payable in respect of unpaid work undertaken voluntarily, including the work done by members of a household within an unincorporated enterprise owned by the same household. Compensation of employees excludes any taxes payable by the employer on the wage and salary bill (e.g. payroll tax). See also <i>Employers' social contributions</i> and <i>Wages and salaries</i> .
Current prices	Estimates are valued at the prices of the period to which the observation relates. For example, estimates for 2002–03 are valued using 2002–03 prices. This contrasts to chain volume measures where the prices used in valuation refer to the prices of the previous year.
Direct tourism gross domestic product (GDP)	Is direct tourism gross value added plus net taxes on products that are attributable to the tourism industry (tourism net taxes on products). Direct tourism GDP will generally have a higher value than direct tourism value added. Direct tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While it is useful in this context, the direct tourism gross value added measure should be used when making comparisons with other industries or between countries. See also <i>Direct tourism gross value added</i> and <i>Tourism net taxes on products</i> .
Direct tourism gross value added	The value of direct tourism output at basic prices, less the value of the inputs used in producing these tourism products. This measure is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and should also be used for comparisons across countries. See also <i>Direct tourism output</i> and <i>Direct tourism GDP</i> .
Direct tourism output	The value of goods and services, at basic prices, which are consumed by visitors and produced in Australia by industries in a direct relationship with visitors. See also <i>Basic prices</i> and <i>Direct tourism gross value added</i> .
Domestic tourism consumption	Consists of the tourism consumption by resident visitors on tourism related products within Australia. It is the sum of household tourism consumption and business and government tourism consumption. See also <i>Tourism consumption</i> ; <i>Internal tourism consumption</i> ; <i>Business and government tourism consumption</i> ; <i>Household tourism consumption</i> .
Economically significant prices	Prices which have a significant influence on both the amounts producers are willing to supply and the amounts purchasers' wish to buy. See also <i>Basic price</i> and <i>Purchasers' price</i> .
Employed person	Is a person aged 15 years and over who, during the reference week: <ul style="list-style-type: none"> ■ 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); or ■ worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers); or

GLOSSARY *continued*

Employed person <i>continued</i>	<ul style="list-style-type: none"> ■ were employees who had a job but were not at work and were: away from work for less than four weeks up to the end of the reference week; or away from work for more than four weeks up to the end of the reference week and received pay for some or all of the four week period to the end of the reference week; or away from work as a standard work or shift arrangement; or on strike or locked out; or on workers' compensation and expected to return to their job; or ■ were employers or own account workers, who had a job, business or farm, but were not at work.
Employers' social contributions	Payments by employers which are intended to secure for their employees the entitlement to social benefits should certain events occur, or certain circumstances exist, that may adversely affect their employees' income or welfare – namely work-related accidents and retirement.
Exports of goods and services	The value of goods exported and amounts receivable from non-residents for the provision of services by residents.
Final consumption expenditure – general government	Government final consumption expenditure is current expenditure by general government bodies on services to the community such as defence, education, and public order and safety less any explicit charges for these services. If these are provided free of charge or at charges which cover only a small proportion of costs, the government is considered to be the consumer of its own output. This output has no directly observable market value, and so it is valued in the national accounts at its cost of production. It also includes the value of the portion of market output purchased by the General Government sector on behalf of beneficiaries.
Final consumption expenditure – households	Net expenditure on goods and services by persons and expenditure of a current nature by private non-profit institutions serving households. This item excludes expenditures by unincorporated businesses and expenditures on assets by non-profit institutions (included in gross fixed capital formation). Also excluded is expenditure on maintenance of dwellings (treated as intermediate expenses of private enterprises), but personal expenditure on motor vehicles and other durable goods and the imputed rent of owner-occupied dwellings are included. The value of 'backyard' production (including food produced and consumed on farms) is included in household final consumption expenditure and the payment of wages and salaries in kind (e.g. food and lodging supplied free to employees) is counted in both household income and household final consumption expenditure.
Gross domestic product (GDP)	Is the total market value of goods and services produced in Australia within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. Thus gross domestic product, as here defined, is 'at market prices'. It is equivalent to gross national expenditure plus exports of goods and services less imports of goods and services. Farm product is that part of gross domestic product which arises from production in agriculture and services to agriculture. It is equivalent to the value added of ANZSIC 06 subdivision 01 'Agriculture' plus taxes less subsidies on products primary to this subdivision. Non-farm product arises from production in all other industries.
Gross fixed capital formation	Expenditure on fixed assets broken down into dwellings, non-dwelling construction, machinery and equipment, cultivated biological assets, intellectual property products and ownership transfer costs. The machinery and equipment category includes plant, machinery, equipment, vehicles, etc. Expenditure on repair and maintenance of fixed assets is excluded, being chargeable to the production account. Additions to fixed assets are regarded as capital formation. Also included is compensation of employees and other costs paid by private enterprise in connection with own-account capital formation. Expenditure on dwellings, non-dwelling construction, and machinery and equipment is measured as expenditure on new and second-hand assets, less sales of existing assets. Cultivated biological assets includes livestock and orchard growth. Along with Computer software, Mineral and petroleum exploration and Artistic originals, Research and

GLOSSARY *continued*

Gross fixed capital formation <i>continued</i>	development is now included in the intellectual property products asset type. Ownership transfer costs comprise of stamp duty, real estate agents' fees and sales commissions, conveyancing fees and miscellaneous government charges.
Gross mixed income of unincorporated enterprises	The surplus or deficit accruing from production by unincorporated enterprises. It includes elements of both compensation of employees (returns on labour inputs) and operating surplus (returns on capital inputs).
Gross operating surplus	The operating surplus accruing to all enterprises, except unincorporated enterprises, from their operations in Australia. It is the excess of gross output over the sum of intermediate consumption, compensation of employees, and taxes less subsidies on production and imports. It is calculated before deduction of consumption of fixed capital, dividends, interest, royalties and land rent, and direct taxes payable, but after deducting the inventory valuation adjustment. Gross operating surplus is also calculated for general government and it equals general government's consumption of fixed capital.
Gross value added	The value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries. See also <i>Intermediate consumption</i> and <i>Output</i> .
Household tourism consumption	Consists of the tourism consumption by resident households on tourism related products within Australia. See also <i>Tourism consumption</i> and <i>Internal tourism consumption</i> .
Imports of goods and services	The value of goods imported and amounts payable to non-residents for the provision of services to residents.
Imputed tourism consumption	Consists of imputations made for the consumption by visitors of certain goods and services for which they do not make a payment. Imputation is confined to a small number of cases where a reasonably satisfactory basis for the valuation of the implied transaction is available, and where their inclusion is consistent with the production boundary in the core national accounts.
Input-output table	An input-output table is a means of presenting a detailed analysis of the process of production and the use of goods and services (products) and the income generated in the production process; they can be either in the form of (a) supply and use tables or (b) symmetric input-output tables.
Intermediate consumption	Consists of the value of the goods and services used as inputs by a process of production, excluding compensation of employees and the consumption of fixed capital. See also <i>Gross value added</i> .
Internal tourism consumption	Consists of all tourism consumption of visitors, both resident and non-resident, within Australia. It is the sum of domestic tourism consumption and international tourism consumption. See also <i>Tourism consumption</i> ; <i>Domestic tourism consumption</i> ; <i>International tourism consumption</i> .
International tourism consumption	Also referred to as internal tourism consumption by international visitors. Consists of the tourism consumption within Australia by non-residents on tourism related products. See also <i>Tourism consumption</i> ; <i>Internal tourism consumption</i> ; <i>Domestic tourism consumption</i> .
Margin	This is the difference between the resale price of a good and the cost to the retailer or wholesaler of the good sold. A transport margin consists of the transport charges invoiced separately by the producer in the delivery of a good.
Net taxes on products	Also referred to as taxes less subsidies on products. A tax or subsidy on a product is payable per unit of a good or service. The tax or subsidy may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength,

GLOSSARY *continued*

Net taxes on products <i>continued</i>	distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax or subsidy on a product usually becomes payable when the product is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation. See also <i>Other taxes on production</i> and <i>Taxes less subsidies on production and imports</i> .
Other taxes on production	Consist of all taxes that enterprises incur as a result of engaging in production, except taxes on products. Other taxes on production include: taxes related to the payroll or workforce numbers excluding compulsory social security contributions paid by employers and any taxes paid by the employees themselves out of their wages or salaries; recurrent taxes on land, buildings or other structures; some business and professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions. See also <i>Taxes less subsidies on production and imports</i> and <i>Taxes less subsidies on products</i> .
Outbound tourism consumption	Also referred to as tourism imports. Consists of the tourism consumption by resident visitors outside of Australia while on an international trip. See also <i>Tourism consumption</i> .
Output	This 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. See also <i>Gross value added</i> .
Purchasers' price	The amount paid by the purchaser, excluding any deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser. The purchaser's price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place. See also <i>Basic price</i> and <i>Economically significant price</i> .
Taxes less subsidies on production and imports	Defined as 'taxes on products' plus 'other taxes on production' less 'subsidies on products' less 'other subsidies on production'. The taxes do not include any taxes on the profits or other income received by an enterprise. They are payable irrespective of the profitability of the production process. They may be payable on the land, fixed assets or labour employed in the production process, or on certain activities or transactions. See also <i>Other taxes on production</i> and <i>Net taxes on products</i> .
Tourism	Comprises the activities of visitors. See also <i>Visitor</i> .
Tourism characteristic industries	Are those industries that would either cease to exist in their present form, producing their present product(s), or would be significantly affected if tourism were to cease. Under the international TSA standards, core lists of tourism characteristic industries, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. In the Australian TSA, for an industry to be a country-specific tourism characteristic industry, at least 25 per cent of its output must be consumed by visitors.
Tourism characteristic products	These are defined in the international TSA standards as those products which would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, core lists of tourism characteristic products, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. It is also recommended in the international TSA standards that country-specific tourism characteristic products are identified. In the Australian TSA, for a product to be a country-specific tourism characteristic product, at least 25 per cent of the total output of the product must be consumed by visitors.

GLOSSARY *continued*

Tourism connected industries	Are those, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of direct tourism gross value added and direct tourism GDP.
Tourism connected products	Are those that are consumed by visitors but are not considered as tourism characteristic products. All other products in the supply and use table not consumed by visitors are classified as 'all other goods and services' in the TSA.
Tourism consumption	Consists of tourism expenditure plus imputed consumption by resident and non-resident visitors on tourism related products, including those sold at prices that are not economically significant. See also <i>Tourism expenditure</i> .
Tourism expenditure	Consists of the amount paid by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination. See also <i>Tourism consumption</i> .
Tourism industry ratio	This is the proportion of the total value added of an industry which is related to tourism.
Tourism net taxes on products	Consists of taxes paid less subsidies received on tourism related products which is attributable to productive activity of tourism related industries that are in a direct relationship with visitors. In the case of goods purchased by visitors, only the net taxes attributable to the value of retail trade services on those goods will be included.
Tourism product ratio	This is the proportion of the total supply of a product which is consumed by visitors.
Tourism trip	This is defined in the international TSA standards as those trips which are taken by visitors.
Usual environment	This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study and other places frequently visited. The usual environment criteria has two dimensions. Frequency means places that are visited on a routine basis (at least once a week) are considered part of a person's usual environment, even if the place visited is located a considerable distance from place of residence. Distance means locations close (up to 40 kilometres from home for overnight trips and up to 50 kilometres from home (round trip) for day trips) to the place of residence of a person are also included in their usual environment.
Visitor	A visitor is defined as any person 'taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited'.
Wages and salaries	Consist of amounts payable in cash including the value of any social contributions, income taxes, fringe benefits tax, etc., payable by the employee even if they are actually withheld by the employer for administrative convenience or other reasons and paid directly to social insurance schemes, tax authorities, etc., on behalf of the employee. Wages and salaries may be paid as remuneration in kind instead of, or in addition to, remuneration in cash. Separation, termination and redundancy payments are also included in wages and salaries. Wages and salaries are also measured as far as possible on an accrual rather than a strict cash basis. See also <i>Employers' social contributions</i> and <i>Compensation of employees</i> .

BIBLIOGRAPHY

- Australian Bureau of Statistics, Attendance at Selected Cultural Venues and Events, various issues, (cat. no. 4114.0), ABS, Canberra.
- Australian Bureau of Statistics, Australian System of National Accounts, (cat. no. 5204.0), ABS, Canberra.
- Australian Bureau of Statistics, Australian National Accounts: Input-Output Tables – Electronic Publication, (cat. no. 5209.0.55.001), ABS, Canberra.
- Australian Bureau of Statistics, Australian National Accounts: National Income, Expenditure and Product (cat. no. 5206.0), ABS, Canberra.
- Australian Bureau of Statistics, Australian National Accounts: Tourism Satellite Account 1997-98 (cat. no. 5249.0), ABS, Canberra.
- Australian Bureau of Statistics, Balance of Payments and International Investment Position, Australia (cat. no. 5302.0), ABS, Canberra.
- Australian Bureau of Statistics, Cafes, Restaurants and Catering Services, Australia (cat. no. 8655.0), ABS, Canberra.
- Australian Bureau of Statistics, Casinos (cat. no. 8683.0), ABS, Canberra.
- Australian Bureau of Statistics, Clubs, Pubs, Taverns, and Bars, Australia (cat. no. 8687.0), ABS, Canberra.
- Australian Bureau of Statistics, Commercial Art Galleries, Australia (cat. no. 8651.0), ABS, Canberra.
- Australian Bureau of Statistics, Directory of Tourism Statistics 2000 (cat. no. 1130.0), ABS, Canberra.
- Australian Bureau of Statistics, Gambling Services, Australia (cat. no. 8684.0), ABS, Canberra.
- Australian Bureau of Statistics, Hire Services, Australia (cat. no. 8567.0), ABS, Canberra.
- Australian Bureau of Statistics, Household Expenditure Survey, Summary of Results, Australia, 2003–04 (cat. no. 6530.0), ABS, Canberra.
- Australian Bureau of Statistics, Labour Force, Australia, Detailed, Quarterly (cat. no. 6291.0.55.003), ABS, Canberra.
- Australian Bureau of Statistics, Libraries and Museums, Australia, 1996–97 (cat. no. 8649.0), ABS, Canberra.
- Australian Bureau of Statistics, Museums, Australia (cat. no. 8560.0), ABS, Canberra.
- Australian Bureau of Statistics, Overseas Arrivals and Departures (cat. no. 3401.0), ABS, Canberra.
- Australian Bureau of Statistics, Performing Arts, Australia (cat. no. 8697.0), ABS, Canberra.
- Australian Bureau of Statistics, Retail Trade, Australia (cat. no. 8501.0), ABS, Canberra.
- Australian Bureau of Statistics, Sports and Physical Recreation Services, Australia (cat. no. 8686.0), ABS, Canberra.
- Australian Bureau of Statistics, Tourist Accommodation, Australia (cat. no. 8635.0), ABS, Canberra.
- Australian Bureau of Statistics, Travel Agency Services, Australia (cat. no. 8653.0), ABS, Canberra.
- Australasian Casino Association report by The Allen Consulting Group, Casinos and the Australian Economy 2007-08.
- Australian Customs Service, Annual Report, various issues, Canberra.

BIBLIOGRAPHY *continued*

- Australian International Education Foundation, 1997 Survey of International Students Studying in Australia, Australian Government Printing Service, Canberra, 1998.
- Budget Strategy and Outlook, various issues, Budget Papers, Canberra.
- European Commission, International Monetary Fund, Organisation for Economic Co-operation and Development, United Nations and World Bank, System of National Accounts 2008, Brussels/Luxemburg, New York, Paris, Washington DC, 2008.
- Department of Defence, Defence Annual Report, various issues, Canberra.
- International Monetary Fund, Balance of Payments and International Investment Position Manual, Sixth Edition, IMF, Washington DC, 2008.
- Organisation for Economic Co-operation and Development, Measuring the Role of Tourism in OECD Economies: The OECD Manual on Tourism Satellite Accounts and Employment, OECD, Paris, 2000.
- The University of Queensland Australia, Final Report of the Survey of International Students' Spending in Australia, The University of Queensland Social Research Centre (UQSRC), 2005.
- Tourism Research Australia, Travel by Australians: Quarterly results of the National Visitor Survey, Department of Resources, Energy and Tourism, Canberra.
- Tourism Research Australia, International Visitors in Australia: Quarterly Results of the International Visitor Survey, Department of Resources, Energy and Tourism, Canberra.
- Tourism Research Australia, Tourism's Contribution to the Australian Economy, 1997-1998 to 2007-2008, Department of Resources, Energy and Tourism, Canberra.
- Tourism Research Australia (formerly Bureau of Tourism Research), Meetings Make Their Mark: Characteristics and Economic Contribution of Australia's Meetings and Exhibition Sector, Occasional Paper no. 26, 1999.
- United Nations Statistics Division, Statistical Office of the European Communities, Organisation for Economic Co-operation and Development, World Tourism Organisation, Tourism Satellite Account: Recommended Methodological Framework, 2008, Luxemburg, Madrid, New York, Paris: United Nations.
- United Nations Statistics Division, World Tourism Organisation, International Recommendations for Tourism Statistics, 2008, Luxemburg, Madrid, New York, Paris: United Nations.
- World Tourism Organisation, Tourism Satellite Account (TSA): The Conceptual Framework, June 1999, Enzo Paci World Conference on the Measurement of the Economic Impact of Tourism, Nice, France, 15 – 18 June, 1999.

FOR MORE INFORMATION . . .

INTERNET **www.abs.gov.au** the ABS website is the best place for data from our publications and information about the ABS.

INFORMATION AND REFERRAL SERVICE

Our consultants can help you access the full range of information published by the ABS that is available free of charge from our website. Information tailored to your needs can also be requested as a 'user pays' service. Specialists are on hand to help you with analytical or methodological advice.

<i>PHONE</i>	1300 135 070
<i>EMAIL</i>	client.services@abs.gov.au
<i>FAX</i>	1300 135 211
<i>POST</i>	Client Services, ABS, GPO Box 796, Sydney NSW 2001

FREE ACCESS TO STATISTICS

All statistics on the ABS website can be downloaded free of charge.

WEB ADDRESS **www.abs.gov.au**