



2005-06

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TOURISM SATELLITE ACCOUNT

AUSTRALIAN
NATIONAL
ACCOUNTS

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INQUIRIES

For further information
about these and related
statistics, contact the
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NOTES

ABOUT THIS PUBLICATION	This publication presents the key results of the Tourism Satellite Account (TSA) for the years 1997–98 to 2005–06. Work on the TSA has been funded by the Department of Industry, Tourism and Resources (DITR).
REVISIONS	<p>The TSA methodology involves estimating a full benchmark every third year and the statistics presented in this publication reflect the establishment of a new benchmark in respect of 2003–04. The method for compiling benchmark estimates involves the use of fully balanced supply and use tables that underlie the national accounts. Also the latest industry data in respect of tourism related industries is incorporated.</p> <p>As part of the 2003–04 benchmark process, the relationships established in 1997–98 and 2000–01 have been reviewed and adjusted on the basis of the revised supply use tables for these years. This, in addition to a new supply and use product classification, revisions to input series and a review of TSA methods has brought about some revisions to the entire TSA series. Until the next TSA benchmark is applied (with the 2008–09 TSA release), all TSA estimates for the years beyond 2003–04 will use the 2003–04 benchmark relationships and annual demand data from Tourism Research Australia (TRA).</p> <p>Compared to the estimates released in April 2006, the tourism share of GDP has been revised up across the time series, by between 0.2 and 0.4 percentage points. Tourism GDP has been revised up by \$3.3b (0.4 percentage points) in 2003–04 and \$3.1b (0.3 percentage points) in 2004–05. Tourism value added has been revised up by \$3.3b (0.4 percentage points) in 2003–04 and \$3.2b (0.4 percentage points) in 2004–05. These upward revisions result from the adoption of the industry structures reflected in the supply and use tables which have been substantially revised since the previous benchmarks, coupled with updated consumption and contemporary estimates for some of the key tourism characteristic industries.</p>
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 2006–07 issue of this publication is expected to be released in April 2008.

Brian Pink
Australian Statistician

ANALYSIS OF RESULTS

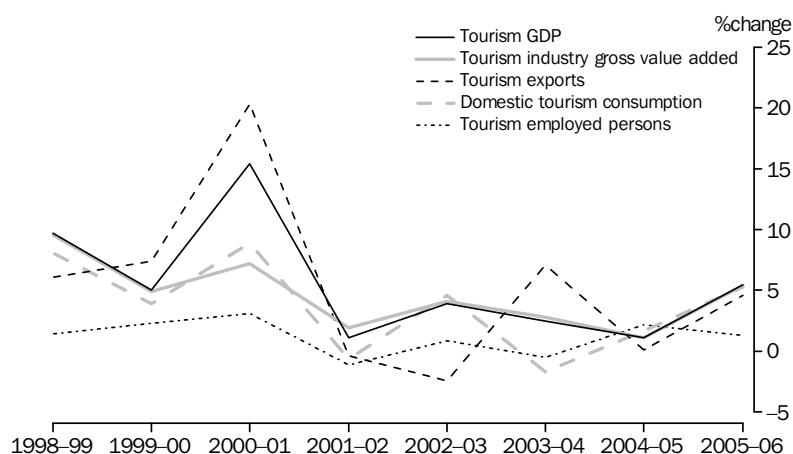
KEY RESULTS

Tourism GDP represents the total market value of Australian produced goods and services consumed by visitors after deducting the cost of goods and services used up in the process of production. Tourism accounted for \$37.6 billion of total GDP in 2005–06. This is an increase of 5.5% from 2004–05. In contrast, total GDP grew by 7.7% in current prices.

The TSA presents growth rates in current prices terms so these estimates reflect the effects of price change as well as the underlying volume of tourism activity. In the absence of information on the changing volume of tourism activity over time, estimates of the tourism industry's share of GDP are presented. In 2005–06 the tourism industry share of GDP was 3.9% which is the lowest share of GDP recorded. The highest tourism share of GDP in 2000–01 (4.7%) was largely due to price increases in tourism services resulting from the introduction of the GST and the increased number of visitors associated with the conduct of the Olympic Games.

While there was an increase in the amount spent on tourism by Australians and international visitors in Australia in 2005–06 compared to 2004–05, the Australian economy as a whole grew at a faster rate than the tourism industry during 2005–06. This has resulted in a decrease in the tourism industry's share of GDP in 2005–06. Domestic tourism consumption grew by 5.3% and expenditure by international visitors increased by 4.6%. While spending increased there were relatively small increases in the number of domestic trips (0.1%) and international trips (1.4%).

SELECTED TOURISM AGGREGATES

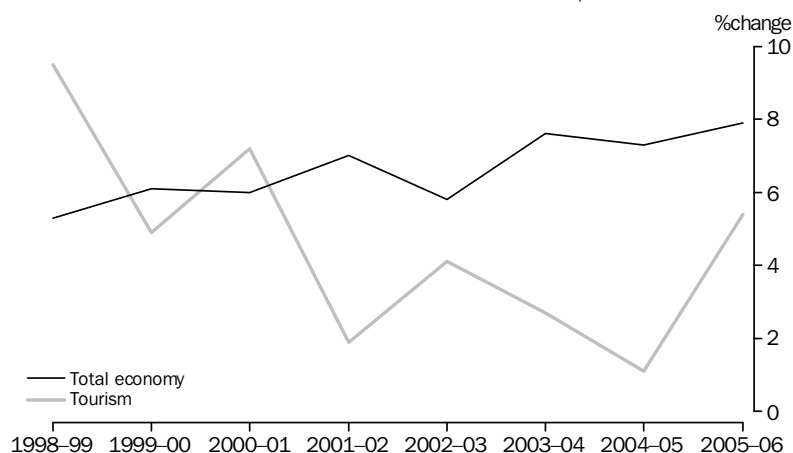


Industry gross value added measures the value of production exclusive of product taxes such as the GST. It is the preferred national accounts measure of the production of industries because it is free from distortions in prices caused by changes in tax rates or the introduction of new taxes. The tourism industry share of total industry gross value added in 2005–06 was 3.5%. This represents the lowest share recorded. The tourism industry share for 2005–06 has declined, as a result of tourism GVA growing slower (5.4%) than GVA for the whole economy (7.9%).

ANALYSIS OF RESULTS *continued*

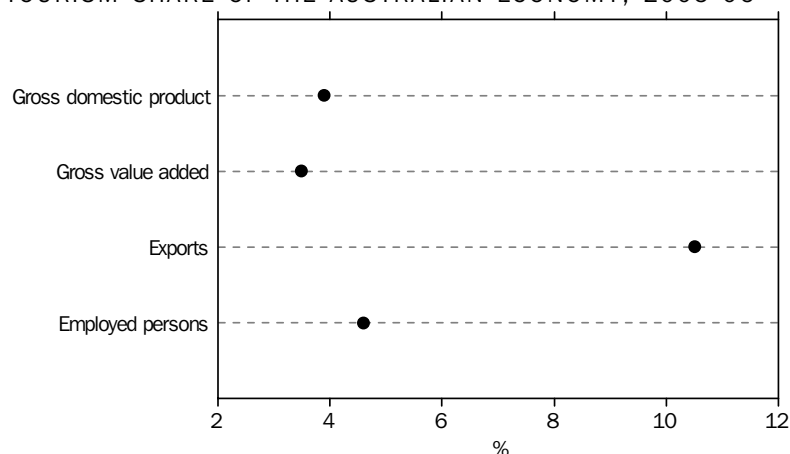
KEY RESULTS *continued*

GROWTH IN INDUSTRY GROSS VALUE ADDED, Current Prices



Tourism continues to contribute significantly to employment and Australia's exports. The tourism industry share of total employment fell slightly in 2005-06 to 4.6%, from 4.7% in 2004-05. While the number of people employed in tourism increased (1.3%) there was a larger increase in employment across the total Australian economy (2.6%).

TOURISM SHARE OF THE AUSTRALIAN ECONOMY, 2005-06



Tourism contributed 10.5% of total exports of goods and services in 2005-06, lower than in 2004-05 when tourism accounted for 11.7% of exports. The fall in share is largely due to strong growth in total exports of 17.2%.

Domestic visitors generated 75.8% of tourism industry GDP in 2005-06 while international visitors generated 24.2%.

TOURISM INDUSTRY GROSS VALUE ADDED

In 2005-06, the industries that accounted for the largest share of tourism gross value added were Air and water transport (14%), Accommodation (13.6%), Other retail trade (11.5%) and Cafes, restaurants and takeaway food outlets (9.8%). These shares have been reasonably static since 1997-98.

ANALYSIS OF RESULTS *continued*

TOURISM INDUSTRY GROSS VALUE ADDED *continued*

TOURISM GROSS VALUE ADDED, By selected industries

	2000–01		2003–04		2004–05		2005–06	
	<i>Tourism gross value added</i>	<i>Share of total value added</i>	<i>Tourism gross value added</i>	<i>Share of total value added</i>	<i>Tourism gross value added</i>	<i>Share of total value added</i>	<i>Tourism gross value added</i>	<i>Share of total value added</i>
	\$m	%	\$m	%	\$m	%	\$m	%
Air & water transport	3 473	12.9	4 089	13.9	4 229	14.2	4 394	14.0
Accommodation	3 421	12.7	3 676	12.5	3 838	12.9	4 247	13.6
Cafes, restaurants & takeaway food outlets	2 743	10.2	2 942	10.0	2 974	10.0	3 080	9.8
Other retail trade	3 278	12.2	3 461	11.8	3 517	11.8	3 606	11.5
All other industries	14 005	52.0	15 197	51.8	15 136	51.0	15 967	51.0
Total	26 920	100.0	29 365	100.0	29 693	100.0	31 293	100.0

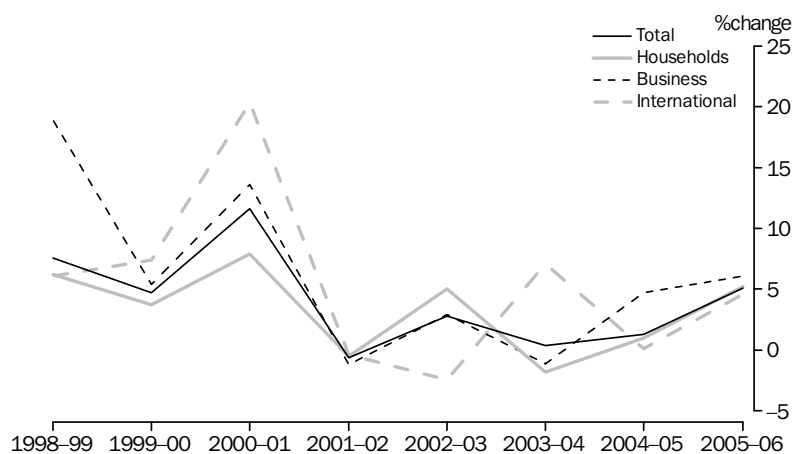
COMPARISON WITH 'NON-TOURISM' INDUSTRIES

Tourism contributed \$31.3 billion to industry gross value added in 2005–06. When compared to the traditional industries published in ABS statistics using Australia and New Zealand Standard Industrial Classification (ANZSIC) divisions, the gross value added of the tourism industry ranks twelfth out of the seventeen industry divisions. Tourism gross value added exceeded that of Agriculture, forestry and fishing; Communication services; Electricity, gas and water supply; Accommodation, cafes and restaurants; Personal and other services; and Cultural and recreational services.

TOURISM CONSUMPTION

Total tourism consumption increased by 5.1% in 2005–06. This was driven by strong growth in total domestic tourism consumption of 5.3% (an increase of \$3,041m) and a 4.6% (\$911m) increase in international visitor consumption. Tourism consumption by domestic households rose from \$47.2 billion to \$49.6 billion in 2005–06, an increase of 5.2%. Consumption by business/government grew from \$9.9 billion to \$10.5 billion in 2005–06, an increase of 6.1%.

GROWTH IN TOURISM CONSUMPTION



ANALYSIS OF RESULTS *continued*

TOURISM CONSUMPTION

continued

There were mixed movements in the consumption of tourism products among domestic and international travellers. Most products saw an increase in the total tourism consumption between 2004–05 and 2005–06 with Food products (7.2%), Long distance passenger transportation (3.9%) and Takeaway and restaurant meals (3.6%) among the largest contributors. Shopping was the most important tourism product for which a decline in consumption (–2.1%) was recorded.

The movements in total tourism consumption were driven by varying movements in the domestic and international visitor consumption proportions combined with changes in the consumption patterns of both types of visitor. Long distance passenger transportation is the dominant tourism product consumed by domestic business/government (35.5%) and international visitors (27%). In contrast, domestic household visitor consumption is dominated by Shopping, including gifts and souvenirs (19.2%), and Takeaway and restaurant meals (17.2%).

Domestic visitors contributed 74.6% of total tourism consumption in 2005–06 while the international visitor contribution was 25.4%. Of all domestic visitors, domestic households accounted for 82.5% and domestic business/government accounted for 17.5%.

The bulk of domestic tourism consumption was by those visitors who stayed away overnight (78.6%), with day visitors accounting for the remainder (21.4%).

SHARE OF TOURISM CONSUMPTION, Selected tourism products—By type of visitor—2005–06

	<i>Households</i>	<i>Business/government</i>	<i>International</i>	<i>All visitors</i>
	%	%	%	%
Long distance passenger transportation	8.9	35.5	27.0	17.0
Shopping (including gifts & souvenirs)	19.2	—	11.1	14.7
Takeaway & restaurant meals	17.2	14.2	8.5	14.6
Accommodation services	8.0	17.7	13.1	10.6
Food products	9.8	2.5	7.1	8.1
Fuel (petrol, diesel)	7.7	13.4	1.5	6.9
Taxi products	0.7	1.7	0.6	0.8
All other tourism products	28.5	14.9	31.2	27.4
Total	100.0	100.0	100.0	100.0

— nil or rounded to zero (including null cells)

INTERNATIONAL TRADE IN TOURISM

Tourism makes an important contribution to Australia's export earnings. In 2005–06, international visitors consumed \$20.5 billion worth of goods and services, an increase of 4.6% on the previous year. However, this represented a declining share of total exports of goods and services due to their stronger growth (17.2%) over the period.

ANALYSIS OF RESULTS *continued*

EXPORTS OF TOURISM GOODS AND SERVICES

		1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
International visitor consumption	\$m	13 740	14 572	15 651	18 822	18 742	18 297	19 594	19 615	20 526
Total exports	\$m	115 132	114 095	128 435	156 163	156 102	151 790	147 205	167 562	196 342
Tourism share of exports	%	11.9	12.8	12.2	12.1	12.0	12.1	13.3	11.7	10.5
Growth in international visitor consumption	%	. .	6.1	7.4	20.3	-0.4	-2.4	7.1	0.1	4.6
Growth in total exports	%	. .	-0.9	12.6	21.6	—	-2.8	-3.0	13.8	17.2

. . not applicable

— nil or rounded to zero (including null cells)

INTERNATIONAL TRADE IN TOURISM *continued*

Exports of tourism goods and services compare favourably with Australia's 'traditional' export products. During 2005-06 tourism exports exceeded exports of iron, steel and non-ferrous metals and food and live animals, but were less than coal.

SELECTED EXPORT COMMODITIES, Percentage of total exports

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	%	%	%	%	%	%	%	%	%
Coal, coke and briquettes	8.3	8.1	6.5	6.9	8.6	7.9	7.5	10.3	12.4
Iron, steel, non-ferrous metals	6.2	6.1	6.9	6.5	6.2	5.7	5.3	5.2	5.7
Food and live animals	13.9	13.6	13.2	13.3	14.3	12.1	12.5	11.7	9.8
Tourism products and services	11.9	12.8	12.2	12.1	12.0	12.1	13.3	11.7	10.5

Source: *International Trade in Goods and Services, Australia* (cat. no. 5368.0).

TOURISM EMPLOYED PERSONS

The tourism industry employed 464,500 persons in 2005-06. The number of tourism employed persons grew 9.9% between 1997-98 and 2005-06, slower than the growth rate in total employed persons (17.1%) over that period. Consequently, the tourism share of total employed persons has fallen from 4.9% in 1997-98 to 4.6% in 2005-06.

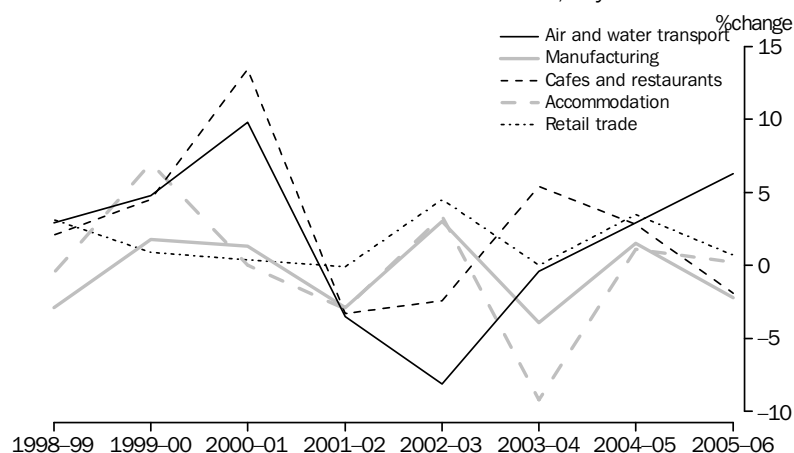
The tourism share of total employment is higher than the tourism share of industry gross value added. This is because tourism tends to be more labour intensive than other forms of economic activity.

The Retail trade industry generated the highest share of tourism employment (23.7%). The Retail trade, Accommodation, and Cafes and restaurants industries account for more than half of the employment generated by tourism.

ANALYSIS OF RESULTS *continued*

TOURISM EMPLOYED PERSONS *continued*

GROWTH IN TOURISM EMPLOYED PERSONS, By selected industries

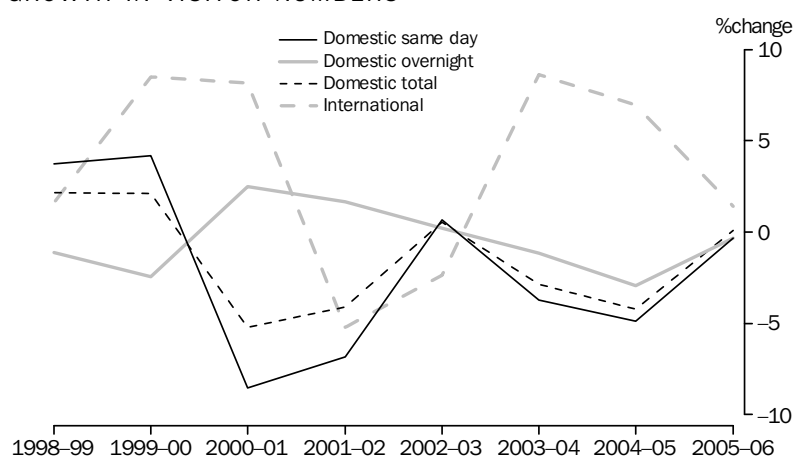


VISITOR NUMBERS

Trips by domestic visitors increased 0.1% in 2005-06. The number of overnight trips decreased by 0.3% while the number of day trips increased by 0.3%.

There were almost 5.5 million short term international visitor arrivals to Australia during 2005-06. This was a 1.4% increase on 2004-05 but follows strong growth in the previous 2 years, 6.9% (2004-05) and 8.6% (2003-04) respectively.

GROWTH IN VISITOR NUMBERS



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TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

TOURISM GROSS DOMESTIC PRODUCT AND ASSOCIATED STATISTICS

Tourism gross value added at basic prices (\$m)	21 855	23 948	25 119	26 920	27 427	28 552	29 365	29 693	31 293
plus Net taxes on tourism products (\$m)	2 788	3 079	3 266	5 817	5 680	5 857	5 897	5 945	6 299
equals tourism GDP (\$m)	24 643	27 026	28 384	32 738	33 106	34 409	35 262	35 638	37 592
Gross domestic product(a) (\$m)	577 373	607 759	645 058	689 262	735 714	781 675	840 285	896 568	965 969
Tourism share of gross value added(b) (%)	4.1	4.3	4.2	4.3	4.1	4.0	3.8	3.6	3.5
Tourism share of gross domestic product(b) (%)	4.3	4.4	4.4	4.7	4.5	4.4	4.2	4.0	3.9

PERCENTAGE CHANGES (c)

Tourism gross value added at basic prices (%)	na	9.6	4.9	7.2	1.9	4.1	2.8	1.1	5.4
plus Net taxes on tourism products (%)	na	10.4	6.1	78.1	-2.4	3.1	0.7	0.8	5.9
equals tourism GDP (%)	na	9.7	5.0	15.3	1.1	3.9	2.5	1.1	5.5
Gross domestic product (%)	na	5.3	6.1	6.9	6.7	6.2	7.5	6.7	7.7

na not available

(a) Source: Australian System of National Accounts, 2005-06 (cat. no. 5204.0).

(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.

(c) Percentage change on previous year.

TOURISM INDUSTRY GDP, By type of visitor

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

TOURISM INDUSTRY GDP (\$m)

Domestic									
Households	16 283	17 728	18 542	20 787	20 878	21 891	22 462	22 666	23 859
Business/government	2 827	3 310	3 452	3 823	3 865	4 109	4 122	4 339	4 631
<i>Total</i>	<i>19 110</i>	<i>21 038</i>	<i>21 994</i>	<i>24 610</i>	<i>24 743</i>	<i>26 000</i>	<i>26 584</i>	<i>27 005</i>	<i>28 490</i>
International	5 534	5 988	6 390	8 128	8 363	8 408	8 678	8 633	9 102
<i>Total</i>	<i>24 643</i>	<i>27 026</i>	<i>28 384</i>	<i>32 738</i>	<i>33 106</i>	<i>34 409</i>	<i>35 262</i>	<i>35 638</i>	<i>37 592</i>

SHARE OF TOURISM INDUSTRY GDP (%)

Domestic									
Households	66.1	65.6	65.3	63.5	63.1	63.6	63.7	63.6	63.5
Business/government	11.5	12.2	12.2	11.7	11.7	11.9	11.7	12.2	12.3
<i>Total</i>	<i>77.5</i>	<i>77.8</i>	<i>77.5</i>	<i>75.2</i>	<i>74.7</i>	<i>75.6</i>	<i>75.4</i>	<i>75.8</i>	<i>75.8</i>
International	22.5	22.2	22.5	24.8	25.3	24.4	24.6	24.2	24.2
<i>Total</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>

TOURISM INDUSTRY SHARE OF GDP (%)

Domestic									
Households	2.8	2.9	2.9	3.0	2.8	2.8	2.7	2.5	2.5
Business/government	0.5	0.5	0.5	0.6	0.5	0.5	0.5	0.5	0.5
<i>Total</i>	<i>3.3</i>	<i>3.5</i>	<i>3.4</i>	<i>3.6</i>	<i>3.4</i>	<i>3.3</i>	<i>3.2</i>	<i>3.0</i>	<i>2.9</i>
International	1.0	1.0	1.0	1.2	1.1	1.1	1.0	1.0	0.9
<i>Total</i>	<i>4.3</i>	<i>4.4</i>	<i>4.4</i>	<i>4.7</i>	<i>4.5</i>	<i>4.4</i>	<i>4.2</i>	<i>4.0</i>	<i>3.9</i>

TOURISM INDUSTRY OUTPUT AT BASIC PRICES

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
.....									
Tourism characteristic industries									
Travel agency and tour operator services	1 702	1 772	1 873	2 022	1 962	1 982	1 962	1 989	2 336
Taxi transport	445	502	504	561	533	538	558	540	622
Air and water transport	9 500	9 999	10 544	11 658	11 131	11 053	11 005	11 383	11 827
Motor vehicle hiring	704	798	857	855	873	910	856	947	1 031
Accommodation	5 339	5 832	6 045	6 787	6 977	7 222	7 293	7 613	8 425
Cafes, restaurants and food outlets	6 437	7 520	7 613	7 790	8 078	8 368	8 354	8 444	8 745
<i>Total tourism characteristic industries</i>	<i>24 127</i>	<i>26 423</i>	<i>27 436</i>	<i>29 673</i>	<i>29 554</i>	<i>30 074</i>	<i>30 027</i>	<i>30 916</i>	<i>32 985</i>
Tourism connected industries									
Clubs, pubs, taverns and bars	1 616	1 862	1 884	1 947	1 999	2 073	2 110	2 147	2 238
Other road transport	1 851	1 916	2 064	1 945	1 897	1 899	2 135	2 121	2 225
Rail transport	753	784	825	782	766	768	885	880	931
Food manufacturing	2 485	3 236	3 161	3 482	3 318	3 455	3 427	3 294	3 556
Beverage manufacturing	1 165	1 347	1 301	1 503	1 498	1 558	1 560	1 622	1 777
Transport equipment manufacturing	557	534	650	573	665	590	608	512	587
Other manufacturing	4 346	4 375	4 549	5 537	4 770	4 656	4 082	3 637	3 265
Automotive fuel retailing	577	622	661	721	757	803	768	784	806
Other retail trade	4 759	4 925	5 389	5 973	6 294	6 689	6 306	6 408	6 570
Casinos and other gambling services	220	249	247	254	250	261	283	289	298
Libraries, museums and arts	647	686	656	749	717	749	854	843	756
Other entertainment services	1 199	1 272	1 217	1 389	1 330	1 390	1 583	1 562	1 402
Education	945	1 069	1 214	1 538	1 818	1 842	2 159	2 126	2 407
Ownership of dwellings	1 496	1 590	1 721	1 828	1 957	2 028	2 080	2 326	2 495
<i>Total tourism connected industries</i>	<i>22 618</i>	<i>24 466</i>	<i>25 542</i>	<i>28 221</i>	<i>28 037</i>	<i>28 760</i>	<i>28 840</i>	<i>28 550</i>	<i>29 313</i>
All other industries	5 236	6 033	6 401	6 244	6 197	6 346	6 775	6 527	6 778
Total	51 981	56 922	59 378	64 138	63 788	65 180	65 642	65 994	69 076
.....									

TOURISM INDUSTRY GROSS VALUE ADDED

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Tourism characteristic industries									
Travel agency and tour operator services	1 065	1 109	1 172	1 144	1 110	1 121	1 267	1 284	1 508
Taxi transport	182	205	206	229	218	220	228	221	254
Air and water transport	2 826	3 065	3 233	3 473	3 646	4 064	4 089	4 229	4 394
Motor vehicle hiring	435	493	529	528	539	562	528	585	636
Accommodation	2 691	2 940	3 047	3 421	3 517	3 641	3 676	3 838	4 247
Cafes, restaurants and food outlets	2 267	2 648	2 681	2 743	2 845	2 947	2 942	2 974	3 080
<i>Total tourism characteristic industries</i>	<i>9 466</i>	<i>10 460</i>	<i>10 868</i>	<i>11 538</i>	<i>11 874</i>	<i>12 554</i>	<i>12 730</i>	<i>13 129</i>	<i>14 118</i>
Tourism connected industries									
Clubs, pubs, taverns and bars	693	798	808	835	857	888	905	920	960
Other road transport	720	745	802	756	737	738	830	824	865
Rail transport	378	394	414	393	385	386	445	442	467
Food manufacturing	627	816	797	878	837	871	864	830	897
Beverage manufacturing	446	516	498	576	574	597	597	621	681
Transport equipment manufacturing	166	159	193	170	198	176	181	152	175
Other manufacturing	1 463	1 473	1 532	1 864	1 606	1 568	1 374	1 224	1 099
Automotive fuel retailing	182	196	208	227	238	253	242	247	254
Other retail trade	2 612	2 703	2 958	3 278	3 454	3 671	3 461	3 517	3 606
Casinos and other gambling services	123	139	139	142	140	146	158	162	167
Libraries, museums and arts	352	373	357	407	390	408	465	458	411
Other entertainment services	337	357	342	390	373	390	444	438	393
Education	717	811	922	1 167	1 380	1 398	1 639	1 613	1 827
Ownership of dwellings	1 230	1 307	1 414	1 503	1 608	1 667	1 709	1 912	2 051
<i>Total tourism connected industries</i>	<i>10 045</i>	<i>10 786</i>	<i>11 384</i>	<i>12 586</i>	<i>12 778</i>	<i>13 156</i>	<i>13 314</i>	<i>13 363</i>	<i>13 851</i>
All other industries	2 345	2 701	2 866	2 796	2 775	2 842	3 322	3 200	3 323
<i>Total</i>	<i>21 855</i>	<i>23 948</i>	<i>25 119</i>	<i>26 920</i>	<i>27 427</i>	<i>28 552</i>	<i>29 365</i>	<i>29 693</i>	<i>31 293</i>
Net taxes on tourism products	2 788	3 079	3 266	5 817	5 680	5 857	5 897	5 945	6 299
Tourism GDP	24 643	27 026	28 384	32 738	33 106	34 409	35 262	35 638	37 592

	2000-01			2003-04			
	<i>Tourism gross value added</i>	<i>Industry gross value added</i>	<i>Tourism contribution to industry gross value added(a)</i>	<i>Tourism gross value added</i>	<i>Industry gross value added</i>	<i>Tourism contribution to industry gross value added(a)</i>	<i>Change in tourism contribution</i>
	\$m	\$m	%	\$m	\$m	%	% pts
Tourism characteristic industries							
Travel agency and tour operator services	1 144	1 203	95.1	1 267	1 350	93.8	-1.3
Taxi transport	229	590	38.8	228	751	30.3	-8.5
Air and water transport	3 473	4 815	72.1	4 089	6 148	66.5	-5.6
Motor vehicle hiring	528	2 573	20.5	528	2 888	18.3	-2.2
Accommodation	3 421	3 884	88.1	3 676	4 354	84.4	-3.7
Cafes, restaurants and food outlets	2 743	9 840	27.9	2 942	11 032	26.7	-1.2
Total tourism characteristic industries	11 538	22 906	50.4	12 730	26 524	48.0	-2.4
Tourism connected industries							
Clubs, pubs, taverns and bars	835	4 723	17.7	905	5 296	17.1	-0.6
Other road transport	756	9 362	8.1	830	11 420	7.3	-0.8
Rail transport	393	4 358	9.0	445	5 421	8.2	-0.8
Food manufacturing	878	12 367	7.1	864	13 107	6.6	-0.5
Beverage manufacturing	576	3 498	16.5	597	5 030	11.9	-4.6
Transport equipment manufacturing	170	6 901	2.5	181	8 894	2.0	-0.4
Other manufacturing	1 864	56 976	3.3	1 374	68 091	2.0	-1.3
Automotive fuel retailing	227	1 596	14.2	242	2 010	12.0	-2.2
Other retail trade	3 278	35 208	9.3	3 461	44 317	7.8	-1.5
Casinos and other gambling services	142	1 786	8.0	158	2 393	6.6	-1.3
Libraries, museums and arts	407	2 957	13.8	465	3 962	11.7	-2.1
Other entertainment services	390	4 662	8.4	444	6 247	7.1	-1.2
Education	1 167	29 763	3.9	1 639	35 735	4.6	0.7
Ownership of dwellings	1 503	57 164	2.6	1 709	66 725	2.6	-0.1
Total tourism connected industries	12 586	231 322	5.4	13 314	278 647	4.8	-0.7
All other industries	2 796	373 897	0.7	3 322	459 620	0.7	—
Total	26 920	628 124	4.3	29 365	764 791	3.8	-0.4
Net taxes on products	5 817	61 138	. .	5 897	75 494
Tourism GDP/GDP	32 738	689 262	4.7	35 262	840 285	4.2	-0.6

. . not applicable

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

— nil or rounded to zero (including null cells)

GROSS VALUE ADDED, By industry division(a)

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
TOURISM GROSS VALUE ADDED (\$m)									
Agriculture, forestry and fishing	222	296	289	317	301	313	340	323	349
Mining	19	17	18	22	17	17	15	12	7
Manufacturing	2 708	2 971	3 027	3 496	3 222	3 219	3 026	2 837	2 861
Electricity, gas and water supply	6	6	6	7	6	5	5	4	2
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	555	570	624	576	616	614	1 037	1 069	1 095
Retail trade	4 360	4 689	4 998	5 483	5 694	5 983	5 753	5 825	6 021
Accommodation, cafes and restaurants	4 429	4 959	5 091	5 521	5 685	5 888	5 939	6 130	6 628
Transport and storage	5 427	5 779	6 111	6 253	6 352	6 784	7 206	7 347	7 847
Communication services	297	382	406	348	345	363	332	288	296
Finance and insurance	7	8	9	8	8	8	9	9	9
Property and business services	516	582	620	636	653	679	677	731	784
Government administration and defence	66	85	90	77	77	81	74	64	66
Education	717	811	922	1 167	1 380	1 398	1 639	1 613	1 827
Health and community services	416	538	572	488	485	512	467	407	419
Cultural and recreational services	812	869	837	939	903	943	1 067	1 059	971
Personal and other services	65	76	80	75	71	73	66	56	52
Ownership of dwellings(b)	1 233	1 310	1 418	1 507	1 613	1 671	1 715	1 918	2 057
Total	21 855	23 948	25 119	26 920	27 427	28 552	29 365	29 693	31 293
TOTAL GROSS VALUE ADDED (c) (\$m)									
Agriculture, forestry and fishing	18 225	19 266	20 818	24 928	29 820	23 256	26 534	27 153	27 318
Mining	25 058	24 766	27 370	34 589	35 437	35 617	33 048	46 152	66 507
Manufacturing	75 934	77 027	78 149	79 500	81 136	88 765	95 122	96 366	97 611
Electricity, gas and water supply	14 213	14 595	14 755	16 037	17 124	18 564	19 401	20 147	22 252
Construction	31 694	34 906	39 199	33 930	39 671	44 512	51 901	56 940	61 713
Wholesale trade	28 216	29 765	31 316	32 192	35 033	39 034	41 987	43 625	45 034
Retail trade	36 190	38 003	39 854	39 846	43 695	46 836	50 656	52 720	54 810
Accommodation, cafes and restaurants	12 589	13 864	15 070	15 848	15 877	16 360	17 768	19 608	19 713
Transport and storage	27 495	29 146	29 328	30 564	32 458	34 559	37 369	40 966	43 054
Communication services	18 459	19 435	19 507	20 086	20 473	21 745	22 748	23 588	23 338
Finance and insurance	34 330	34 593	40 135	44 866	50 405	52 950	58 064	62 299	68 677
Property and business services	61 570	68 004	73 956	82 199	84 885	91 874	98 590	104 773	110 022
Government administration and defence	22 878	23 551	24 190	25 545	28 298	29 876	32 226	34 394	37 557
Education	25 233	27 015	27 821	29 763	31 295	33 618	35 735	37 891	42 012
Health and community services	31 205	33 396	35 715	38 846	41 666	44 881	49 090	53 197	59 032
Cultural and recreational services	7 717	8 063	8 538	9 405	9 871	11 210	12 602	13 132	13 845
Personal and other services	10 273	11 222	12 425	12 816	14 050	14 345	15 225	16 743	17 569
Ownership of dwellings(b)	49 015	51 783	54 485	57 164	60 609	63 047	66 725	70 927	75 583
Total	530 294	558 400	592 631	628 124	671 803	711 049	764 791	820 621	885 647

— nil or rounded to zero (including null cells)

(b) Part of Property and business services ANZSIC division.

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

(c) Source: *Australian System of National Accounts, 2005-06* (cat. no. 5204.0).

GROSS VALUE ADDED, By industry division(a) *continued*

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
TOURISM SHARE OF INDUSTRY GROSS VALUE ADDED (%)									
Agriculture, forestry and fishing	1.2	1.5	1.4	1.3	1.0	1.3	1.3	1.2	1.3
Mining	0.1	0.1	0.1	0.1	—	—	—	—	—
Manufacturing	3.6	3.9	3.9	4.4	4.0	3.6	3.2	2.9	2.9
Electricity, gas and water supply	—	—	—	—	—	—	—	—	—
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	2.0	1.9	2.0	1.8	1.8	1.6	2.5	2.4	2.4
Retail trade	12.0	12.3	12.5	13.8	13.0	12.8	11.4	11.0	11.0
Accommodation, cafes and restaurants	35.2	35.8	33.8	34.8	35.8	36.0	33.4	31.3	33.6
Transport and storage	19.7	19.8	20.8	20.5	19.6	19.6	19.3	17.9	18.2
Communication services	1.6	2.0	2.1	1.7	1.7	1.7	1.5	1.2	1.3
Finance and insurance	—	—	—	—	—	—	—	—	—
Property and business services	0.8	0.9	0.8	0.8	0.8	0.7	0.7	0.7	0.7
Government administration and defence	0.3	0.4	0.4	0.3	0.3	0.3	0.2	0.2	0.2
Education	2.8	3.0	3.3	3.9	4.4	4.2	4.6	4.3	4.3
Health and community services	1.3	1.6	1.6	1.3	1.2	1.1	1.0	0.8	0.7
Cultural and recreational services	10.5	10.8	9.8	10.0	9.2	8.4	8.5	8.1	7.0
Personal and other services	0.6	0.7	0.6	0.6	0.5	0.5	0.4	0.3	0.3
Ownership of dwellings(b)	2.5	2.5	2.6	2.6	2.7	2.7	2.6	2.7	2.7
<i>Total</i>	4.1	4.3	4.2	4.3	4.1	4.0	3.8	3.6	3.5

— nil or rounded to zero (including null cells)

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

(b) Part of Property and business services ANZSIC division.

TOURISM SUPPLY AT BASIC PRICES, By industry division(a)

	2000-01		2003-04	
	<i>Contribution of tourism product output to total output</i>		<i>Contribution of tourism product output to total output</i>	
	<i>Tourism product output</i>	<i>product output to total output</i>	<i>Tourism product output</i>	<i>product output to total output</i>
	\$m	%	\$m	%
Agriculture, forestry and fishing	828	1.3	801	1.2
Mining	65	0.1	41	0.1
Manufacturing	11 865	18.5	10 259	15.6
Electricity, gas and water supply	22	—	14	—
Construction	—	—	—	—
Wholesale trade	1 471	2.3	2 416	3.7
Retail trade	10 912	17.0	11 589	17.7
Accommodation, cafes and restaurants	12 325	19.2	13 258	20.2
Transport and storage	17 391	27.1	16 990	25.9
Communication services	996	1.6	894	1.4
Finance and insurance	17	—	17	—
Property and business services	1 097	1.7	1 160	1.8
Government administration and defence	200	0.3	175	0.3
Education	1 538	2.4	2 159	3.3
Health and community services	1 003	1.6	903	1.4
Cultural and recreational services	2 391	3.7	2 719	4.1
Personal and other services	179	0.3	155	0.2
Ownership of dwellings	1 838	2.9	2 091	3.2
Total	64 138	100.0	65 642	100.0

— nil or rounded to zero (including null cells)

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

TOURISM SUPPLY, By type of product

	Contribution of tourism product output to total output(a)	Tourism product output (basic prices)	Imports purchased in Australia by tourists	Net taxes on tourism products	Tourism margins	Tourism supply (purchasers' prices)
	%	\$m	\$m	\$m	\$m	\$m
2000-01						
Tourism characteristic products						
Travel agency and tour operator services	91.9	2 251	—	19	—	2 270
Taxi fares	40.7	561	—	18	—	578
Long distance passenger transportation	88.6	13 489	—	-20	—	13 468
Motor vehicle hire and lease	21.0	914	7	43	—	964
Accommodation services	95.6	6 542	—	325	—	6 867
Takeaway and restaurant meals(b)	30.8	9 806	—	830	—	10 635
Shopping (including gifts and souvenirs)	3.9	2 985	2 772	841	4 916	11 514
Total tourism characteristic products	34.5	36 547	2 780	2 054	4 916	46 296
Tourism connected products						
Local area passenger transportation	15.3	488	—	-142	—	346
Repair and maintenance of motor vehicles	1.5	364	19	37	48	467
Fuel (petrol, diesel)	17.7	2 949	87	1 904	665	5 606
Food products	6.6	3 964	361	86	1 510	5 921
Alcoholic beverages and other beverages	11.2	1 939	106	821	539	3 405
Motor vehicles, caravans, boats, etc	4.9	469	363	81	249	1 162
Recreational, cultural and sports services	11.8	2 264	3	249	—	2 517
Gambling and betting services	6.3	618	—	257	—	873
Education	3.4	1 643	55	—	—	1 698
Actual and imputed rent on holiday houses	2.7	1 838	—	—	—	1 838
Retail margin	13.1	6 146	—	—	-6 146	—
Other margin	3.5	2 146	—	—	-2 146	—
Total tourism connected products	6.0	24 829	994	3 291	-5 281	23 833
Other tourism goods and services	0.7	2 762	80	472	366	3 680
Total	4.5	64 138	3 853	5 817	—	73 809
2003-04						
Tourism characteristic products						
Travel agency and tour operator services	92.6	2 183	—	—	—	2 183
Taxi fares	30.1	558	—	14	—	572
Long distance passenger transportation	84.0	12 831	—	19	—	12 850
Motor vehicle hire and lease	18.5	915	8	80	—	1 004
Accommodation services	94.7	7 024	—	298	—	7 322
Takeaway and restaurant meals(b)	27.1	10 506	—	756	—	11 261
Shopping (including gifts and souvenirs)	4.0	1 894	3 081	1 000	6 038	12 012
Total tourism characteristic products	31.3	35 911	3 089	2 167	6 038	47 205
Tourism connected products						
Local area passenger transportation	15.3	577	—	-134	—	443
Repair and maintenance of motor vehicles	1.2	328	20	27	58	433
Fuel (petrol, diesel)	13.7	2 278	119	1 707	724	4 828
Food products	6.8	3 878	386	93	1 830	6 188
Alcoholic beverages and other beverages	11.9	2 013	136	768	625	3 543
Motor vehicles, caravans, boats, etc	3.8	507	350	58	282	1 197
Recreational, cultural and sports services	11.3	2 582	3	197	—	2 782
Gambling and betting services	6.7	689	—	307	—	994
Education	4.7	2 307	67	—	—	2 373
Actual and imputed rent on holiday houses	2.6	2 091	—	—	—	2 091
Retail margin	11.4	6 540	—	—	-6 540	—
Other margin	3.5	3 525	—	—	-3 525	—
Total tourism connected products	3.5	27 313	1 081	3 024	-6 545	24 871
Other tourism goods and services	0.6	2 417	91	706	507	3 722
Total	4.0	65 642	4 259	5 897	—	75 798
— nil or rounded to zero (including null cells) (a) Also referred to as the tourism product ratio.						
(b) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.						

INCOME COMPONENTS OF TOURISM GROSS VALUE ADDED, By industry(a)

	Compensation of employees	Gross operating surplus/Gross mixed income	Other net taxes on production	Tourism gross value added at basic prices
	\$m	\$m	\$m	\$m
2000-01				
Tourism characteristic industries				
Travel agency and tour operator services	772	364	7	1 144
Taxi transport	47	178	4	229
Air and water transport	2 238	1 117	119	3 473
Motor vehicle hiring	95	427	5	528
Accommodation	2 136	1 065	220	3 421
Cafes, restaurants and food outlets	1 988	724	31	2 743
<i>Total tourism characteristic industries</i>	<i>7 277</i>	<i>3 874</i>	<i>387</i>	<i>11 538</i>
Tourism connected industries				
Clubs, pubs, taverns and bars	422	398	15	835
Other road transport	476	215	65	756
Rail transport	224	160	9	393
Food manufacturing	530	319	29	878
Beverage manufacturing	180	386	9	576
Transport equipment manufacturing	102	64	5	170
Other manufacturing	1 024	791	49	1 864
Automotive fuel retailing	130	93	3	227
Other retail trade	2 149	979	151	3 278
Casinos and other gambling services	28	113	2	142
Libraries, museums and arts	300	102	6	407
Other entertainment services	261	107	21	390
Education	1 059	85	23	1 167
Ownership of dwellings	—	1 403	100	1 503
<i>Total tourism connected industries</i>	<i>6 884</i>	<i>5 216</i>	<i>487</i>	<i>12 586</i>
All other industries	1 386	1 331	78	2 796
Total	15 547	10 421	952	26 920

2003-04				
Tourism characteristic industries				
Travel agency and tour operator services	886	373	7	1 267
Taxi transport	47	177	4	228
Air and water transport	2 490	1 463	136	4 089
Motor vehicle hiring	96	428	5	528
Accommodation	2 296	1 144	237	3 676
Cafes, restaurants and food outlets	2 132	777	33	2 942
<i>Total tourism characteristic industries</i>	<i>7 946</i>	<i>4 360</i>	<i>423</i>	<i>12 730</i>
Tourism connected industries				
Clubs, pubs, taverns and bars	457	432	16	905
Other road transport	522	236	71	830
Rail transport	253	181	10	445
Food manufacturing	521	314	29	864
Beverage manufacturing	187	401	10	597
Transport equipment manufacturing	108	68	5	181
Other manufacturing	755	583	36	1 374
Automotive fuel retailing	139	100	3	242
Other retail trade	2 268	1 033	160	3 461
Casinos and other gambling services	31	125	2	158
Libraries, museums and arts	342	116	7	465
Other entertainment services	298	122	24	444
Education	1 487	120	32	1 639
Ownership of dwellings	—	1 596	114	1 709
<i>Total tourism connected industries</i>	<i>7 369</i>	<i>5 427</i>	<i>519</i>	<i>13 314</i>
All other industries	1 792	1 444	85	3 322
Total	17 107	11 232	1 027	29 365

— nil or rounded to zero (including null cells)

(a) The tourism components have been calculated by multiplying the income components of gross value added by the relevant tourism industry ratio.

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

TOTAL TOURISM CONSUMPTION (\$m)

Tourism characteristic products

Travel agency and tour operator services	1 894	1 972	2 085	2 270	2 202	2 225	2 183	2 213	2 599
Taxi fares	440	496	498	578	549	555	572	554	638
Long distance passenger transportation	10 836	11 367	12 026	13 468	12 847	12 758	12 850	13 195	13 714
Motor vehicle hire and lease	753	859	924	964	986	1 029	1 004	1 108	1 208
Accommodation services	5 139	5 586	5 800	6 867	7 054	7 302	7 322	7 661	8 516
Takeaway and restaurant meals(a)	8 100	9 466	9 581	10 635	11 029	11 425	11 261	11 383	11 788
Shopping (including gifts and souvenirs)	9 658	9 729	10 361	11 514	11 299	11 876	12 012	12 088	11 829
<i>Total tourism characteristic products</i>	<i>36 821</i>	<i>39 474</i>	<i>41 275</i>	<i>46 296</i>	<i>45 966</i>	<i>47 172</i>	<i>47 205</i>	<i>48 201</i>	<i>50 294</i>

Tourism connected products

Local area passenger transportation	308	321	325	346	342	343	443	446	471
Repair and maintenance of motor vehicles	490	422	491	467	462	421	433	350	357
Fuel (petrol, diesel)	4 081	4 371	4 797	5 606	5 089	5 102	4 828	4 905	5 541
Food products	4 722	5 204	5 466	5 921	5 842	6 138	6 188	6 123	6 564
Alcoholic beverages and other beverages	2 528	3 055	3 071	3 405	3 458	3 618	3 543	3 734	4 038
Motor vehicles, caravans, boats, etc.	1 028	1 195	1 184	1 162	1 255	1 220	1 197	1 179	1 312
Recreational, cultural and sports services	1 960	2 075	1 987	2 517	2 411	2 519	2 782	2 748	2 466
Gambling and betting services	703	794	791	873	863	892	994	1 015	1 046
Education	1 021	1 188	1 347	1 698	1 999	2 031	2 373	2 346	2 655
Actual and imputed rent on holiday houses	1 504	1 598	1 730	1 838	1 967	2 038	2 091	2 338	2 508
<i>Total tourism connected products</i>	<i>18 344</i>	<i>20 224</i>	<i>21 189</i>	<i>23 833</i>	<i>23 686</i>	<i>24 323</i>	<i>24 871</i>	<i>25 184</i>	<i>26 958</i>

Other tourism goods and services

	3 519	3 465	3 690	3 680	3 732	3 967	3 722	3 366	3 452
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Total **58 684** **63 163** **66 155** **73 809** **73 384** **75 461** **75 798** **76 752** **80 703**

AVERAGE TOURISM CONSUMPTION (\$)

Tourism characteristic products

Travel agency and tour operator services	8.1	8.3	8.6	9.8	9.9	10.0	10.0	10.6	12.4
Taxi fares	1.9	2.1	2.0	2.5	2.5	2.5	2.6	2.7	3.1
Long distance passenger transportation	46.4	47.7	49.3	58.1	57.8	57.2	59.1	63.2	65.6
Motor vehicle hire and lease	3.2	3.6	3.8	4.2	4.4	4.6	4.6	5.3	5.8
Accommodation services	22.0	23.4	23.8	29.6	31.8	32.7	33.7	36.7	40.7
Takeaway and restaurant meals(a)	34.7	39.7	39.3	45.9	49.7	51.2	51.8	54.5	56.4
Shopping (including gifts and souvenirs)	41.4	40.8	42.5	49.7	50.9	53.2	55.3	57.9	56.6
<i>Total tourism characteristic products</i>	<i>157.7</i>	<i>165.6</i>	<i>169.4</i>	<i>199.9</i>	<i>206.9</i>	<i>211.4</i>	<i>217.2</i>	<i>230.9</i>	<i>240.6</i>

Tourism connected products

Local area passenger transportation	1.3	1.3	1.3	1.5	1.5	1.5	2.0	2.1	2.3
Repair and maintenance of motor vehicles	2.1	1.8	2.0	2.0	2.1	1.9	2.0	1.7	1.7
Fuel (petrol, diesel)	17.5	18.3	19.7	24.2	22.9	22.9	22.2	23.5	26.5
Food products	20.2	21.8	22.4	25.6	26.3	27.5	28.5	29.3	31.4
Alcoholic beverages and other beverages	10.8	12.8	12.6	14.7	15.6	16.2	16.3	17.9	19.3
Motor vehicles, caravans, boats, etc.	4.4	5.0	4.9	5.0	5.6	5.5	5.5	5.6	6.3
Recreational, cultural and sports services	8.4	8.7	8.2	10.9	10.9	11.3	12.8	13.2	11.8
Gambling and betting services	3.0	3.3	3.2	3.8	3.9	4.0	4.6	4.9	5.0
Education	4.4	5.0	5.5	7.3	9.0	9.1	10.9	11.2	12.7
Actual and imputed rent on holiday houses	6.4	6.7	7.1	7.9	8.9	9.1	9.6	11.2	12.0
<i>Total tourism connected products</i>	<i>78.6</i>	<i>84.8</i>	<i>86.9</i>	<i>102.9</i>	<i>106.6</i>	<i>109.0</i>	<i>114.4</i>	<i>120.6</i>	<i>129.0</i>

Other tourism goods and services

	15.1	14.5	15.1	15.9	16.8	17.8	17.1	16.1	16.5
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Total **251.4** **264.9** **271.4** **318.7** **330.4** **338.2** **348.8** **367.7** **386.1**

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

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
DOMESTIC HOUSEHOLDS (a)									
Tourism characteristic products									
Travel agency and tour operator services	1 178	1 205	1 262	1 354	1 327	1 360	1 341	1 363	1 625
Taxi fares	140	173	161	192	180	180	159	156	327
Long distance passenger transportation	3 738	3 908	4 054	4 165	4 025	4 075	4 113	4 130	4 433
Motor vehicle hire and lease	268	340	407	476	478	489	497	580	610
Accommodation services	2 349	2 718	2 744	3 132	3 225	3 391	3 402	3 492	3 977
Takeaway and restaurant meals(b)	6 475	7 187	7 216	7 851	8 172	8 519	8 092	8 225	8 545
Shopping (including gifts and souvenirs)	7 541	7 563	8 180	8 950	8 838	9 536	9 596	9 711	9 544
<i>Total tourism characteristic products</i>	<i>21 690</i>	<i>23 093</i>	<i>24 022</i>	<i>26 120</i>	<i>26 245</i>	<i>27 549</i>	<i>27 199</i>	<i>27 657</i>	<i>29 062</i>
Tourism connected products									
Local area passenger transportation	151	158	150	159	163	168	147	154	184
Repair and maintenance of motor vehicles	450	377	446	416	407	372	305	245	247
Fuel (petrol, diesel)	3 182	3 290	3 498	3 884	3 467	3 494	3 347	3 403	3 833
Food products	3 791	4 067	4 235	4 458	4 370	4 652	4 550	4 482	4 847
Alcoholic beverages and other beverages	2 071	2 370	2 344	2 531	2 577	2 693	2 548	2 733	2 975
Motor vehicles, caravans, boats, etc	912	1 053	1 041	1 025	1 060	1 050	1 022	980	962
Recreational, cultural and sports services	1 733	1 815	1 704	2 129	2 048	2 158	2 322	2 359	2 101
Gambling and betting services	494	559	602	652	688	730	791	854	911
Education	76	89	89	90	88	95	101	110	120
Actual and imputed rent on holiday houses	1 282	1 357	1 474	1 566	1 679	1 716	1 716	1 930	2 063
<i>Total tourism connected products</i>	<i>14 142</i>	<i>15 134</i>	<i>15 582</i>	<i>16 909</i>	<i>16 547</i>	<i>17 127</i>	<i>16 850</i>	<i>17 252</i>	<i>18 242</i>
Other tourism goods and services	2 492	2 492	2 604	2 533	2 537	2 906	2 675	2 302	2 341
<i>Total</i>	<i>38 324</i>	<i>40 718</i>	<i>42 208</i>	<i>45 562</i>	<i>45 329</i>	<i>47 581</i>	<i>46 724</i>	<i>47 210</i>	<i>49 644</i>
DOMESTIC BUSINESS/GOVERNMENT (a)									
Tourism characteristic products									
Travel agency and tour operator services	471	506	531	559	550	563	577	580	720
Taxi fares	200	231	239	274	256	256	280	274	183
Long distance passenger transportation	2 756	2 919	3 133	3 395	3 306	3 338	3 456	3 523	3 742
Motor vehicle hire and lease	278	288	266	225	228	256	203	238	251
Accommodation services	1 218	1 183	1 191	1 482	1 465	1 535	1 492	1 799	1 859
Takeaway and restaurant meals(b)	652	1 184	1 170	1 307	1 394	1 469	1 412	1 441	1 498
Shopping (including gifts and souvenirs)	12	15	21	22	21	22	3	3	3
<i>Total tourism characteristic products</i>	<i>5 586</i>	<i>6 326</i>	<i>6 550</i>	<i>7 264</i>	<i>7 219</i>	<i>7 440</i>	<i>7 423</i>	<i>7 859</i>	<i>8 257</i>
Tourism connected products									
Local area passenger transportation	4	5	5	8	8	8	19	19	24
Repair and maintenance of motor vehicles	23	24	27	33	34	35	110	84	85
Fuel (petrol, diesel)	748	915	1 110	1 481	1 401	1 407	1 250	1 253	1 408
Food products	79	222	224	231	234	248	248	246	267
Alcoholic beverages and other beverages	75	272	272	301	311	331	310	337	368
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—	—	—	—
Recreational, cultural and sports services	1	1	1	—	—	—	—	—	—
Gambling and betting services	—	—	—	—	—	—	—	—	—
Education	41	45	45	45	44	47	51	55	60
Actual and imputed rent on holiday houses	—	—	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>971</i>	<i>1 484</i>	<i>1 683</i>	<i>2 100</i>	<i>2 033</i>	<i>2 076</i>	<i>1 987</i>	<i>1 993</i>	<i>2 213</i>
Other tourism goods and services	62	63	62	61	60	67	69	74	64
<i>Total</i>	<i>6 619</i>	<i>7 872</i>	<i>8 295</i>	<i>9 425</i>	<i>9 313</i>	<i>9 583</i>	<i>9 479</i>	<i>9 926</i>	<i>10 533</i>

— nil or rounded to zero (including null cells)

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

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

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
INTERNATIONAL									
Tourism characteristic products									
Travel agency and tour operator services	244	261	292	356	326	302	265	270	254
Taxi fares	101	92	99	113	114	119	133	124	128
Long distance passenger transportation	4 343	4 540	4 839	5 909	5 517	5 345	5 281	5 542	5 540
Motor vehicle hire and lease	206	231	251	262	280	284	303	291	348
Accommodation services	1 574	1 685	1 865	2 253	2 364	2 377	2 428	2 370	2 680
Takeaway and restaurant meals(a)	975	1 095	1 195	1 477	1 462	1 438	1 757	1 717	1 745
Shopping (including gifts and souvenirs)	2 105	2 151	2 161	2 542	2 439	2 318	2 414	2 373	2 282
<i>Total tourism characteristic products</i>	<i>9 548</i>	<i>10 056</i>	<i>10 703</i>	<i>12 912</i>	<i>12 502</i>	<i>12 183</i>	<i>12 582</i>	<i>12 686</i>	<i>12 976</i>
Tourism connected products									
Local area passenger transportation	153	158	170	179	170	167	277	273	263
Repair and maintenance of motor vehicles	18	21	18	18	21	15	18	21	25
Fuel (petrol, diesel)	151	166	189	240	220	201	231	249	300
Food products	850	915	1 007	1 232	1 239	1 238	1 390	1 395	1 450
Alcoholic beverages and other beverages	380	414	456	573	570	594	685	664	694
Motor vehicles, caravans, boats, etc	114	142	143	137	195	170	175	199	350
Recreational, cultural and sports services	226	260	283	388	363	361	460	389	365
Gambling and betting services	209	235	189	220	174	162	203	161	135
Education	904	1 054	1 214	1 564	1 866	1 889	2 221	2 180	2 475
Actual and imputed rent on holiday houses	221	241	255	272	288	322	374	408	445
<i>Total tourism connected products</i>	<i>3 226</i>	<i>3 606</i>	<i>3 923</i>	<i>4 824</i>	<i>5 106</i>	<i>5 120</i>	<i>6 034</i>	<i>5 939</i>	<i>6 503</i>
Other tourism goods and services	965	911	1 025	1 086	1 135	994	978	990	1 047
<i>Total</i>	<i>13 740</i>	<i>14 572</i>	<i>15 651</i>	<i>18 822</i>	<i>18 742</i>	<i>18 297</i>	<i>19 594</i>	<i>19 615</i>	<i>20 526</i>
TOTAL									
Tourism characteristic products									
Travel agency and tour operator services	1 894	1 972	2 085	2 270	2 202	2 225	2 183	2 213	2 599
Taxi fares	440	496	498	578	549	555	572	554	638
Long distance passenger transportation	10 836	11 367	12 026	13 468	12 847	12 758	12 850	13 195	13 714
Motor vehicle hire and lease	753	859	924	964	986	1 029	1 004	1 108	1 208
Accommodation services	5 139	5 586	5 800	6 867	7 054	7 302	7 322	7 661	8 516
Takeaway and restaurant meals(a)	8 100	9 466	9 581	10 635	11 029	11 425	11 261	11 383	11 788
Shopping (including gifts and souvenirs)	9 658	9 729	10 361	11 514	11 299	11 876	12 012	12 088	11 829
<i>Total tourism characteristic products</i>	<i>36 821</i>	<i>39 474</i>	<i>41 275</i>	<i>46 296</i>	<i>45 966</i>	<i>47 172</i>	<i>47 205</i>	<i>48 201</i>	<i>50 294</i>
Tourism connected products									
Local area passenger transportation	308	321	325	346	342	343	443	446	471
Repair and maintenance of motor vehicles	490	422	491	467	462	421	433	350	357
Fuel (petrol, diesel)	4 081	4 371	4 797	5 606	5 089	5 102	4 828	4 905	5 541
Food products	4 722	5 204	5 466	5 921	5 842	6 138	6 188	6 123	6 564
Alcoholic beverages and other beverages	2 528	3 055	3 071	3 405	3 458	3 618	3 543	3 734	4 038
Motor vehicles, caravans, boats, etc	1 028	1 195	1 184	1 162	1 255	1 220	1 197	1 179	1 312
Recreational, cultural and sports services	1 960	2 075	1 987	2 517	2 411	2 519	2 782	2 748	2 466
Gambling and betting services	703	794	791	873	863	892	994	1 015	1 046
Education	1 021	1 188	1 347	1 698	1 999	2 031	2 373	2 346	2 655
Actual and imputed rent on holiday houses	1 504	1 598	1 730	1 838	1 967	2 038	2 091	2 338	2 508
<i>Total tourism connected products</i>	<i>18 344</i>	<i>20 224</i>	<i>21 189</i>	<i>23 833</i>	<i>23 686</i>	<i>24 323</i>	<i>24 871</i>	<i>25 184</i>	<i>26 958</i>
Other tourism goods and services	3 519	3 465	3 690	3 680	3 732	3 967	3 722	3 366	3 452
<i>Total</i>	<i>58 684</i>	<i>63 163</i>	<i>66 155</i>	<i>73 809</i>	<i>73 384</i>	<i>75 461</i>	<i>75 798</i>	<i>76 752</i>	<i>80 703</i>

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

AVERAGE TOURISM CONSUMPTION, By type of visitor

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	\$	\$	\$	\$	\$	\$	\$	\$	\$
DOMESTIC (a)									
Tourism characteristic products									
Travel agency and tour operator services	8.3	8.4	8.7	10.0	10.1	10.2	10.3	10.9	12.8
Taxi fares	1.9	2.1	2.1	2.6	2.5	2.5	2.7	2.7	3.1
Long distance passenger transportation	47.3	48.5	50.3	59.4	59.1	58.4	60.5	64.9	67.4
Motor vehicle hire and lease	3.3	3.7	3.9	4.3	4.5	4.7	4.7	5.5	5.9
Accommodation services	22.4	23.9	24.3	30.3	32.5	33.4	34.5	37.7	41.8
Takeaway and restaurant meals(b)	35.3	40.4	40.1	46.9	50.7	52.3	53.1	56.0	57.9
Shopping (including gifts and souvenirs)	42.1	41.6	43.3	50.8	52.0	54.4	56.6	59.4	58.1
<i>Total tourism characteristic products</i>	<i>160.6</i>	<i>168.6</i>	<i>172.6</i>	<i>204.3</i>	<i>211.5</i>	<i>215.9</i>	<i>222.4</i>	<i>237.1</i>	<i>247.1</i>
Tourism connected products									
Local area passenger transportation	1.3	1.4	1.4	1.5	1.6	1.6	2.1	2.2	2.3
Repair and maintenance of motor vehicles	2.1	1.8	2.1	2.1	2.1	1.9	2.0	1.7	1.8
Fuel (petrol, diesel)	17.8	18.7	20.1	24.7	23.4	23.4	22.7	24.1	27.2
Food products	20.6	22.2	22.9	26.1	26.9	28.1	29.2	30.1	32.2
Alcoholic beverages and other beverages	11.0	13.0	12.8	15.0	15.9	16.6	16.7	18.4	19.8
Motor vehicles, caravans, boats, etc	4.5	5.1	5.0	5.1	5.8	5.6	5.6	5.8	6.4
Recreational, cultural and sports services	—	8.9	8.3	11.1	11.1	11.5	13.1	13.5	12.1
Gambling and betting services	3.1	3.4	3.3	3.9	4.0	4.1	4.7	5.0	5.1
Education	4.5	5.1	5.6	7.5	9.2	9.3	11.2	11.5	13.0
Actual and imputed rent on holiday houses	6.6	6.8	7.2	8.1	9.1	9.3	9.8	11.5	12.3
<i>Total tourism connected products</i>	<i>80.0</i>	<i>86.4</i>	<i>88.6</i>	<i>105.2</i>	<i>109.0</i>	<i>111.3</i>	<i>117.2</i>	<i>123.9</i>	<i>132.4</i>
Other tourism goods and services	15.3	14.8	15.4	16.2	17.2	18.2	17.5	16.6	17.0
Total	256.0	269.8	276.7	325.7	337.6	345.4	357.1	377.5	396.5
INTERNATIONAL									
Tourism characteristic products									
Travel agency and tour operator services	57.9	60.9	62.8	70.8	68.3	64.8	52.4	50.0	46.3
Taxi fares	23.9	21.4	21.2	22.4	23.8	25.5	26.3	22.8	23.3
Long distance passenger transportation	1 029.2	1 058.8	1 040.3	1 174.4	1 156.9	1 148.1	1 044.2	1 024.7	1 010.2
Motor vehicle hire and lease	48.7	53.9	54.0	52.1	58.7	61.0	60.0	53.7	63.4
Accommodation services	372.9	393.0	401.0	447.8	495.9	510.5	480.2	438.1	488.7
Takeaway and restaurant meals(b)	231.1	255.4	256.9	293.6	306.7	308.9	347.5	317.4	318.2
Shopping (including gifts and souvenirs)	498.9	501.6	464.5	505.2	511.6	497.9	477.3	438.7	416.1
<i>Total tourism characteristic products</i>	<i>2 262.6</i>	<i>2 345.0</i>	<i>2 300.7</i>	<i>2 566.4</i>	<i>2 621.9</i>	<i>2 616.7</i>	<i>2 487.9</i>	<i>2 345.6</i>	<i>2 366.0</i>
Tourism connected products									
Local area passenger transportation	36.3	36.8	36.6	35.7	35.7	35.9	54.8	50.5	47.9
Repair and maintenance of motor vehicles	4.2	4.9	3.8	3.6	4.3	3.2	3.6	3.9	4.6
Fuel (petrol, diesel)	35.7	38.8	40.7	47.8	46.2	43.3	45.6	45.9	54.7
Food products	201.5	213.4	216.4	244.9	259.8	266.0	274.8	257.9	264.5
Alcoholic beverages and other beverages	90.2	96.6	98.0	113.9	119.4	127.5	135.4	122.7	126.6
Motor vehicles, caravans, boats, etc	27.1	33.2	30.8	27.3	40.9	36.5	34.7	36.8	63.8
Recreational, cultural and sports services	53.4	60.6	60.7	77.1	76.1	77.6	91.0	71.9	66.6
Gambling and betting services	49.5	54.8	40.7	43.8	36.5	34.7	40.1	29.8	24.7
Education	214.1	245.7	260.9	310.8	391.4	405.8	439.2	403.1	451.2
Actual and imputed rent on holiday houses	52.5	56.1	54.9	54.1	60.4	69.2	74.0	75.4	81.1
<i>Total tourism connected products</i>	<i>764.5</i>	<i>841.0</i>	<i>843.4</i>	<i>958.8</i>	<i>1 070.8</i>	<i>1 099.6</i>	<i>1 193.2</i>	<i>1 098.1</i>	<i>1 185.8</i>
Other tourism goods and services	228.7	212.4	220.3	215.8	238.0	213.5	193.4	183.1	190.9
Total	3 255.8	3 398.4	3 364.5	3 741.0	3 930.6	3 929.8	3 874.6	3 626.8	3 742.8

— nil or rounded to zero (including null cells)

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

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

DOMESTIC TOURISM CONSUMPTION, By length of stay

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

TOURISM CONSUMPTION – SAME DAY (\$m)

Tourism characteristic products									
Travel agency and tour operator services	4	5	6	6	5	6	5	4	6
Taxi fares	32	40	43	52	42	42	49	36	45
Long distance passenger transportation	360	321	369	473	361	308	428	286	295
Motor vehicle hire and lease	44	45	52	52	50	45	35	45	49
Accommodation services	-	-	-	-	-	-	-	-	-
Takeaway and restaurant meals(a)	1 739	2 032	2 096	2 153	2 134	2 267	2 090	2 153	2 364
Shopping (including gifts and souvenirs)	3 338	3 109	3 546	3 779	3 593	3 781	3 662	3 753	3 811
<i>Total tourism characteristic products</i>	<i>5 517</i>	<i>5 552</i>	<i>6 112</i>	<i>6 515</i>	<i>6 184</i>	<i>6 450</i>	<i>6 268</i>	<i>6 277</i>	<i>6 570</i>
Tourism connected products									
Local area passenger transportation	47	46	63	55	59	60	50	58	55
Repair and maintenance of motor vehicles	97	127	168	121	137	134	108	156	143
Fuel (petrol, diesel)	1 512	1 695	1 984	2 033	1 797	1 853	1 759	1 859	2 192
Food products	1 013	1 151	1 343	1 187	1 065	1 177	1 035	985	1 174
Alcoholic beverages and other beverages	496	538	583	546	510	557	508	522	587
Motor vehicles, caravans, boats, etc	474	545	540	532	550	545	530	507	499
Recreational, cultural and sports services	383	422	367	503	448	419	438	454	417
Gambling and betting services	140	212	228	247	261	277	300	323	345
Education	54	47	60	60	59	63	68	74	80
Actual and imputed rent on holiday houses	-	-	-	-	-	-	-	-	-
<i>Total tourism connected products</i>	<i>4 217</i>	<i>4 785</i>	<i>5 336</i>	<i>5 283</i>	<i>4 886</i>	<i>5 085</i>	<i>4 796</i>	<i>4 939</i>	<i>5 493</i>
Other tourism goods and services	863	834	910	813	702	811	942	729	801
Total	10 597	11 171	12 357	12 611	11 772	12 345	12 007	11 945	12 863

AVERAGE TOURISM CONSUMPTION – SAME DAY (\$)

Tourism characteristic products									
Travel agency and tour operator services	—	—	—	—	—	—	—	—	—
Taxi fares	0.2	0.2	0.3	0.3	0.3	0.3	0.4	0.3	0.3
Long distance passenger transportation	1.8	2.0	2.2	3.1	2.5	2.1	3.1	2.2	2.2
Motor vehicle hire and lease	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.3	0.4
Accommodation services	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	11.3	12.7	12.5	14.1	15.0	15.8	15.2	16.4	18.0
Shopping (including gifts and souvenirs)	21.6	19.4	21.2	24.7	25.2	26.4	26.6	28.6	29.0
<i>Total tourism characteristic products</i>	<i>35.7</i>	<i>34.6</i>	<i>36.6</i>	<i>42.6</i>	<i>43.5</i>	<i>45.0</i>	<i>45.5</i>	<i>47.9</i>	<i>49.9</i>
Tourism connected products									
Local area passenger transportation	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Repair and maintenance of motor vehicles	0.6	0.8	1.0	0.8	1.0	0.9	0.8	1.2	1.1
Fuel (petrol, diesel)	9.8	10.6	11.9	13.3	12.6	12.9	12.8	14.2	16.7
Food products	6.6	7.2	8.0	7.8	7.5	8.2	7.5	7.5	8.9
Alcoholic beverages and other beverages	3.2	3.4	3.5	3.6	3.6	3.9	3.7	4.0	4.5
Motor vehicles, caravans, boats, etc	3.1	3.4	3.2	3.5	3.9	3.8	3.8	3.9	3.8
Recreational, cultural and sports services	2.5	2.6	2.2	3.3	3.1	2.9	3.2	3.5	3.2
Gambling and betting services	0.9	1.3	1.4	1.6	1.8	1.9	2.2	2.5	2.6
Education	0.4	0.3	0.4	0.4	0.4	0.4	0.5	0.6	0.6
Actual and imputed rent on holiday houses	—	—	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>27.3</i>	<i>29.8</i>	<i>31.9</i>	<i>34.6</i>	<i>34.3</i>	<i>35.5</i>	<i>34.8</i>	<i>37.7</i>	<i>41.7</i>
Other tourism goods and services	5.6	5.2	5.4	5.3	4.9	5.7	6.8	5.6	6.1
Total	68.6	69.7	74.0	82.6	82.7	86.2	87.1	91.1	97.7

— nil or rounded to zero (including null cells)

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

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

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

Tourism characteristic products									
Travel agency and tour operator services	1 645	1 706	1 787	1 907	1 872	1 917	1 913	1 939	2 340
Taxi fares	307	364	356	413	393	395	390	394	466
Long distance passenger transportation	6 124	6 505	6 818	7 087	6 970	7 105	7 141	7 367	7 879
Motor vehicle hire and lease	503	583	621	650	656	700	665	772	812
Accommodation services	3 677	3 900	3 935	4 614	4 690	4 926	4 894	5 291	5 836
Takeaway and restaurant meals(b)	5 861	6 339	6 290	7 005	7 432	7 720	7 414	7 513	7 679
Shopping (including gifts and souvenirs)	4 203	4 469	4 654	5 194	5 267	5 777	5 936	5 962	5 737
Total tourism characteristic products	22 319	23 867	24 460	26 870	27 280	28 539	28 354	29 239	30 749
Tourism connected products									
Local area passenger transportation	107	117	93	112	112	116	115	115	153
Repair and maintenance of motor vehicles	375	274	305	329	304	272	307	173	189
Fuel (petrol, diesel)	2 416	2 510	2 624	3 333	3 071	3 048	2 838	2 797	3 048
Food products	2 857	3 138	3 116	3 502	3 539	3 722	3 763	3 743	3 939
Alcoholic beverages and other beverages	1 836	2 103	2 033	2 286	2 378	2 467	2 350	2 548	2 756
Motor vehicles, caravans, boats, etc	438	507	501	493	510	506	491	473	463
Recreational, cultural and sports services	1 351	1 393	1 338	1 626	1 600	1 739	1 883	1 906	1 684
Gambling and betting services	355	347	374	405	428	453	491	530	566
Education	63	86	74	75	74	79	84	92	100
Actual and imputed rent on holiday houses	1 282	1 357	1 474	1 566	1 679	1 716	1 716	1 930	2 063
Total tourism connected products	11 081	11 833	11 930	13 726	13 695	14 118	14 041	14 307	14 962
Other tourism goods and services	1 690	1 720	1 756	1 780	1 895	2 162	1 802	1 647	1 604
Total	35 091	37 420	38 146	42 376	42 870	44 819	44 197	45 192	47 315

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

Tourism characteristic products									
Travel agency and tour operator services	22.0	23.1	24.8	25.8	24.9	25.5	25.7	26.9	33.0
Taxi fares	4.1	4.9	4.9	5.6	5.2	5.2	5.2	5.5	6.5
Long distance passenger transportation	72.6	88.1	94.7	96.0	92.9	94.5	96.0	102.1	109.5
Motor vehicle hire and lease	6.7	7.9	8.6	8.8	8.7	9.3	8.9	10.7	11.3
Accommodation services	49.2	52.8	54.6	62.5	62.5	65.5	65.8	73.3	81.1
Takeaway and restaurant meals(b)	78.5	85.9	87.3	94.9	99.0	102.6	99.7	104.1	106.8
Shopping (including gifts and souvenirs)	56.3	60.5	64.6	70.4	70.2	76.8	79.8	82.6	79.7
Total tourism characteristic products	298.9	323.3	339.6	364.0	363.5	379.4	381.3	405.1	427.5
Tourism connected products									
Local area passenger transportation	1.4	1.6	1.3	1.5	1.5	1.5	1.6	1.6	2.1
Repair and maintenance of motor vehicles	5.0	3.7	4.2	4.5	4.1	3.6	4.1	2.4	2.6
Fuel (petrol, diesel)	32.4	34.0	36.4	45.1	40.9	40.5	38.2	38.8	42.4
Food products	38.3	42.5	43.3	47.4	47.2	49.5	50.6	51.9	54.8
Alcoholic beverages and other beverages	24.6	28.5	28.2	31.0	31.7	32.8	31.6	35.3	38.3
Motor vehicles, caravans, boats, etc	5.9	6.9	7.0	6.7	6.8	6.7	6.6	6.6	6.4
Recreational, cultural and sports services	18.1	18.9	18.6	22.0	21.3	23.1	25.3	26.4	23.4
Gambling and betting services	4.7	4.7	5.2	5.5	5.7	6.0	6.6	7.3	7.9
Education	0.8	1.2	1.0	1.0	1.0	1.0	1.1	1.3	1.4
Actual and imputed rent on holiday houses	17.2	18.4	20.5	21.2	22.4	22.8	23.1	26.7	28.7
Total tourism connected products	148.4	160.3	165.7	185.9	182.5	187.7	188.8	198.2	208.0
Other tourism goods and services	22.6	23.3	24.4	24.1	25.3	28.7	24.2	22.8	22.3
Total	470.0	506.8	529.7	574.0	571.2	595.9	594.4	626.1	657.7

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

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

TOURISM CONSUMPTION, By Australian residents—outbound trips

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

Domestically produced goods and services (\$m)	2 349	2 393	2 610	2 964	2 910	2 953	3 269	3 679	3 797
Overseas produced tourism goods and services									
Purchased by businesses (\$m)	3 246	3 148	3 423	3 661	3 314	3 345	3 704	3 827	3 997
Purchased by households (\$m)	8 483	9 745	10 049	12 052	11 362	11 489	13 531	15 679	16 588
Total^(a) (\$m)	11 729	12 893	13 472	15 713	14 675	14 834	17 234	19 506	20 584
Total consumption by Australian residents on outbound trips (\$m)	14 078	15 286	16 082	18 677	17 585	17 787	20 504	23 185	24 381
Average consumption by Australian residents on outbound trips (\$)	4 643	4 794	4 826	5 221	5 221	5 401	5 208	5 050	5 043

(a) There are some conceptual differences between imports of tourism goods and services and tourism related services debits in the *Balance of Payments and International Investments Position, Australia* (cat. no. 5302.0). See the Explanatory notes for further details.

TOURISM CONSUMPTION, By non-residents—inbound trips

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

Overseas produced goods and services (\$m)	3 862	3 804	4 408	5 108	4 922	4 720	4 581	4 789	5 108
Domestically produced tourism goods and services									
Purchased by businesses (\$m)	1 948	2 025	2 124	2 416	2 408	2 367	2 487	2 489	2 573
Purchased by households (\$m)	11 792	12 548	13 527	16 407	16 334	15 929	17 108	17 126	17 953
Total^(a) (\$m)	13 740	14 572	15 651	18 822	18 742	18 297	19 594	19 615	20 526
Total consumption by non-residents on inbound trips (\$m)	17 602	18 377	20 058	23 930	23 664	23 016	24 176	24 404	25 634
Average consumption by non-residents on inbound trips (\$)	4 171	4 286	4 312	4 756	4 963	4 944	4 780	4 512	4 674

(a) There are some conceptual differences between exports of tourism goods and services and tourism related services credits in the *Balance of Payments and International Investments Position, Australia* (cat. no. 5302.0). See the Explanatory notes for further details.

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PEOPLE EMPLOYED IN TOURISM, By Industry

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

Tourism characteristic and connected industries

Travel agency and tour operator services ('000)	23.8	24.4	22.8	22.2	22.2	20.7	20.9	21.7	21.5
Road transport and motor vehicle hiring ('000)	21.0	21.2	21.0	21.7	22.6	22.3	22.6	21.0	21.5
Air and water transport ('000)	30.8	31.7	33.2	36.5	35.2	32.3	32.2	33.1	35.2
Accommodation ('000)	73.9	73.5	78.7	78.6	76.2	78.8	71.6	72.3	72.5
Cafes and restaurants ('000)	42.1	43.0	44.9	50.9	49.2	48.0	50.7	52.1	51.1
Clubs, pubs, taverns and bars ('000)	23.0	23.1	23.5	24.2	23.2	22.1	22.9	23.6	23.0
Rail transport ('000)	3.0	3.0	2.7	2.9	2.5	2.8	2.8	2.7	2.9
Manufacturing ('000)	31.5	30.6	31.1	31.5	30.6	31.5	30.3	30.8	30.1
Retail trade ('000)	97.1	100.1	101.0	101.4	101.3	105.8	105.8	109.5	110.2
Casinos and other gambling services ('000)	2.3	1.9	2.0	2.2	2.0	1.8	2.0	2.0	2.2
Libraries, museums and arts ('000)	5.8	6.4	6.2	7.7	7.5	7.6	7.5	8.9	9.2
Other entertainment services ('000)	8.1	8.5	9.0	8.6	9.3	10.1	10.2	11.4	12.2
Education ('000)	27.3	28.0	28.3	28.8	30.0	31.0	32.4	31.4	33.4
<i>Total tourism characteristic and connected industries ('000)</i>	<i>389.8</i>	<i>395.5</i>	<i>404.4</i>	<i>417.3</i>	<i>411.6</i>	<i>414.8</i>	<i>411.8</i>	<i>420.4</i>	<i>424.9</i>
All other industries ('000)	32.7	32.8	33.8	34.5	35.0	35.8	36.8	38.1	39.5
Total tourism employed persons ('000)	422.5	428.3	438.2	451.8	446.6	450.7	448.6	458.6	464.5
Total employed persons(a) ('000)	8 574.6	8 641.6	8 835.2	9 016.4	9 143.9	9 377.7	9 528.0	9 789.9	10 042.2
Tourism industry share of total employment (%)	4.9	5.0	5.0	5.0	4.9	4.8	4.7	4.7	4.6

(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.

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NUMBER OF TRIPS

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06

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

Domestic

Same day	154 581	160 316	167 054	152 765	142 302	143 260	137 900	131 151	131 601
Overnight	74 665	73 830	72 017	73 819	75 047	75 216	74 356	72 178	71 934
Total domestic	229 246	234 146	239 071	226 584	217 349	218 476	212 256	203 329	203 535
International	4 220	4 288	4 652	5 031	4 768	4 656	5 057	5 408	5 484

SHORT-TERM ARRIVALS, International visitors—By country of residence

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	695.7	718.9	773.1	828.4	787.7	793.1	926.1	1 082.0	1 090.8
Total(a)	814.6	855.0	908.6	960.9	907.5	904.7	1 047.0	1 207.9	1 221.6
North-west Europe									
France	39.0	46.2	53.5	54.2	52.0	46.3	57.3	59.0	65.6
Germany	130.2	129.8	147.2	147.5	136.8	134.0	141.0	142.4	150.4
United Kingdom	445.1	483.1	554.4	605.4	627.1	644.2	686.4	699.5	709.3
Total(a)	814.0	874.8	1 009.3	1 079.8	1 068.0	1 070.9	1 138.8	1 162.7	1 195.0
Southern & Eastern Europe									
Italy	46.3	48.5	54.4	54.6	41.1	42.5	43.7	49.5	50.8
Total(a)	95.6	105.5	118.1	132.9	101.4	98.1	106.5	117.6	122.5
Middle East & North Africa									
Total	35.4	46.2	52.0	56.6	55.7	50.1	56.4	68.2	73.4
Southeast Asia									
Indonesia	120.0	100.4	83.1	98.3	94.7	86.9	91.5	82.4	81.8
Malaysia	124.8	128.1	146.8	148.4	154.3	142.4	175.3	169.0	152.5
Singapore	256.9	244.5	277.0	293.3	295.8	261.6	252.6	267.5	251.8
Thailand	44.9	59.5	68.0	77.9	80.0	75.5	78.8	79.3	74.8
Total(a)	602.2	590.5	634.4	676.7	682.7	617.7	654.1	657.1	625.7
Northeast Asia									
China (excludes SARs and Taiwan Province)	71.9	81.6	105.0	143.5	172.3	177.1	216.9	274.4	292.3
Hong Kong (SAR of China)	144.3	138.7	149.0	154.1	148.6	140.7	132.2	148.9	158.8
Japan	797.0	725.8	705.5	724.2	659.2	658.6	687.5	700.8	674.4
Korea	133.2	88.4	139.4	164.6	181.1	195.8	215.8	237.3	242.9
Taiwan (Province of China)	154.8	147.3	140.9	124.3	99.1	80.8	103.9	103.8	102.3
Total(a)	1 303.9	1 185.2	1 242.8	1 314.3	1 262.4	1 254.8	1 358.5	1 467.6	1 473.5
Southern & Central Asia									
Total	40.8	46.8	55.4	65.1	62.0	55.9	71.3	79.0	99.3
The Americas									
United States of America	355.7	393.7	436.9	502.1	424.4	423.5	430.1	445.5	452.5
Total(a)	449.8	500.1	551.1	645.0	551.1	537.1	551.9	581.1	598.8
Sub-Saharan Africa									
Total	58.8	77.8	72.4	74.5	73.3	62.8	72.4	66.9	74.0
Not stated	4.7	6.1	7.7	25.5	4.3	3.7	0.2	0.2	0.3
Total	4 220.0	4 288.0	4 651.8	5 031.3	4 768.3	4 655.8	5 057.2	5 408.3	5 484.1

(a) Includes other.

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

SHORT TERM DEPARTURES, Australian residents—By main destination

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	429.2	477.4	506.7	574.5	592.2	615.3	739.2	843.0	836.3
Total(a)	652.8	725.9	776.8	810.3	843.7	888.2	1 057.0	1 192.9	1 211.1
Northwest Europe									
France	37.3	41.4	44.3	52.8	45.2	51.2	58.0	66.6	73.1
Germany	38.1	39.3	39.5	43.5	43.5	42.1	44.9	51.6	65.7
United Kingdom	327.4	306.0	330.2	323.2	308.0	308.9	351.4	384.9	409.3
Total(a)	480.4	469.9	504.6	510.8	478.5	492.1	550.9	609.9	661.5
Southern & Eastern Europe									
Italy	61.0	66.2	64.7	76.7	70.8	71.0	84.2	91.3	102.7
Total(a)	174.2	168.3	186.2	209.1	190.7	188.0	222.6	247.5	270.8
Middle East & North Africa									
Total	69.4	78.4	76.6	87.4	76.6	76.2	118.5	122.9	142.5
Southeast Asia									
Indonesia	324.0	349.0	256.8	294.8	270.9	194.4	271.1	344.0	241.9
Malaysia	104.2	111.9	126.3	134.8	109.5	97.8	126.0	155.5	163.9
Singapore	115.8	133.8	145.9	153.6	163.2	119.1	148.4	175.9	204.7
Thailand	103.8	137.5	147.8	157.7	163.4	150.5	153.8	187.0	246.4
Total(a)	763.1	854.1	801.0	897.7	860.9	721.9	894.4	1 093.0	1 096.2
Northeast Asia									
China (excludes SARs and Taiwan Province)	81.6	81.8	86.3	100.6	121.3	117.9	150.2	214.2	239.9
Hong Kong (SAR of China)	142.0	142.7	149.7	156.8	142.0	114.8	140.1	173.3	190.7
Japan	56.6	62.0	64.6	67.7	71.6	72.5	79.6	96.3	100.3
Korea	17.6	17.3	19.8	23.0	23.9	24.7	27.0	28.5	30.7
Taiwan (Province of China)	35.3	32.4	34.9	35.8	35.4	33.2	39.4	39.4	37.2
Total(a)	334.7	337.7	357.0	386.4	396.1	364.8	438.9	554.6	602.5
Southern & Central Asia									
Total	68.8	69.6	78.5	85.4	76.5	84.4	110.4	134.2	155.2
The Americas									
United States of America	346.2	323.9	373.7	372.6	276.0	287.4	342.1	394.5	437.8
Total(a)	422.1	410.0	467.7	487.1	370.8	397.9	456.7	531.8	581.2
Sub-Saharan Africa									
Total	51.5	50.4	57.8	53.7	57.2	63.5	71.3	79.1	86.4
Not stated	14.8	24.2	26.1	49.5	16.9	16.3	16.1	25.3	27.6
Total	3 031.9	3 188.7	3 332.3	3 577.3	3 367.9	3 293.3	3 936.8	4 591.2	4 834.9

(a) Includes other.

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

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 a conventional industry or product in international statistical standards. In the *Australian and New Zealand Standard Industrial Classification* (ANZSIC), 1993 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, 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 tourism GDP in 2000–01 and later years. This 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 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 (UN), and the World Tourism Organisation (WTO). The international standards were released electronically in March 2000 in *Tourism Satellite Account: Methodological References*, and were published in 2001 in *Tourism Satellite Account: Recommended Methodological Framework*. National statistical offices such as the ABS were consulted during the development of the international standards. The standards are based on the *System of National Accounts 1993* (SNA93), 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 The estimates of tourism gross value added, tourism GDP and 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 Indirect tourism demand is a broader notion that includes the downstream effects of tourism demand. For example, when a visitor buys a meal, indirect tourism demand is 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 (formerly Bureau of Tourism Research) have undertaken this work and their latest results are reported in the *Tourism Research Report (Volume 5, No. 2 2004) Indirect Economic Contribution of Tourism to Australia, 2001–02*.

CONCEPTS OF TOURISM *Tourism*

9 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.

10 An important conceptual distinction concerns the difference between travel and tourism. Travel is a broad concept which includes commuting to a place of work, migration and travel for business or leisure. The international standards describe the concept of tourism as comprising:

'...the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.' (*Tourism Satellite Account: Recommended Methodological Framework*, para 2.1).

11 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.

12 While most of the economic impacts of tourism occur while persons are travelling, there are some exceptions. Tourism activity also includes consumption activity in anticipation of trips (such as purchases of camping luggage or travel insurance), or after the return home (such as having film developed for pictures taken during the trip).

Visitors

13 The 'persons' referred to in the definition of tourism are termed 'visitors'. A visitor is defined as:

'...any person travelling to a place other than that of his/her usual environment for less than twelve months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited' (*Tourism Satellite Account: Recommended Methodological Framework*, para 2.4).

14 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.

15 For the purposes of measuring tourism gross value added and 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.

16 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

EXPLANATORY NOTES *continued*

Visitors continued

- 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.

Usual environment

17 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.

18 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 consumption

19 Tourism consumption is defined as

'...the total consumption made by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination' (*Tourism Satellite Account: Recommended Methodological Framework*, para 3.8).

20 Included in this definition are both actual expenditures and imputations for the consumption by visitors of certain services for which they do not make a payment. Also consistent with the definition of visitors, tourism consumption includes expenditure by visitors whose primary purpose is business. Consumption before or after the trip is likewise included provided the expenditures are related to the trip, such as the purchase of luggage or film processing.

21 Tourism consumption is defined to include only transactions between a visitor and a business with whom the visitor has direct contact. Direct contact does not necessarily imply payment has to occur. For example, tourism consumption includes an imputation for the value of non-market services provided directly to visitors, e.g. museums and libraries, even though these may be provided free or at a price which is not economically significant. This is consistent with the treatment in the national accounts of non-market services provided by general government and non-profit institutions.

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

Tourism gross value added and tourism GDP

23 Tourism gross value added and 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.

24 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. Tourism gross value added is measured as the value of the output of tourism products by industries 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 Goods and services tax (GST), wholesale sales taxes and excise duties on goods supplied

EXPLANATORY NOTES *continued*

Tourism gross value added and tourism GDP continued

to visitors. 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.

25 SNA93 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.

26 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 received on tourism related products as these are reflected in prices that visitors actually pay. Tourism GDP will generally have a higher value than tourism value added. 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 tourism gross value added measure should be used when making comparisons with other industries or between countries.

Gross fixed capital formation

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

28 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

29 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.

30 Tourism characteristic products are defined in the international TSA standards as those products which represent an important part of tourism consumption, or for which a significant proportion of the sales are to visitors. In the Australian TSA, for a product to be 'characteristic' it must account for at least 10 per cent of total tourism consumption and/or at least 25 per cent of the total output of the product must be consumed by visitors.

31 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. In the Australian TSA, for an industry to be 'characteristic', 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.

32 Tourism connected products and industries are those, other than those classified as tourism characteristic, for which a tourism related product is directly identifiable (primary), and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer.

EXPLANATORY NOTES *continued*

Classifications continued

33 All remaining products and industries are classified as 'all other goods and services' or 'all other industries' in the TSA. See Appendix 1 for a concordance between tourism related products in the Australian TSA, and products included in the *Australian and New Zealand Standard Product Classification* (ANZSPC), and Appendix 2 for a concordance between tourism related industries and industries included in the *Australian and New Zealand Standard Industrial Classification* (ANZSIC).

TOURISM SATELLITE ACCOUNT FRAMEWORK

34 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 tourism gross value added and tourism GDP. The input-output table variant provides a tool for further analysis and economic modelling of tourism.

35 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.

36 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 53 industries and 225 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.

37 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 tourism value added and tourism GDP.

38 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.

39 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 SNA93.

CALCULATING BENCHMARK TOURISM GROSS VALUE ADDED AND TOURISM GDP

40 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 and 2003–04.

41 To calculate 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 tourism consumption for each tourism product

EXPLANATORY NOTES *continued*

CALCULATING BENCHMARK TOURISM GROSS VALUE ADDED AND TOURISM GDP *continued*

- remove product taxes and subsidies, margins and imports from tourism consumption of each product at purchasers' prices to derive tourism consumption at basic prices—this represents the domestic output of tourism
- 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
- identify the industries which supply each of the tourism products to visitors
- apply the tourism product ratio to the output of each product by each industry to derive the 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 tourism gross value added at basic prices for each industry as tourism output less the intermediate consumption required to produce the tourism output, and sum for all industries in the economy. Tourism gross value added at basic prices is directly comparable to the value added for all other industries
- tourism GDP is derived by adding net taxes on tourism products (calculated using visitor expenditures as a proportion of total expenditures) to tourism gross value added at basic prices. Tourism GDP is directly comparable to GDP.

UPDATE METHODOLOGY

42 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. The following steps are used in the update years:

- derive an estimate of tourism consumption for each tourism product
- remove product taxes and subsidies, margins and imports from tourism consumption of each product at purchasers' prices to derive tourism consumption at basic prices—this represents the domestic output of tourism
- allocate the 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. Where there is strong evidence of structural change in tourism related industries or the economy more generally, the TSA benchmark coefficients can be altered to reflect this
- sum tourism gross value added for all industries to calculate the tourism industry's gross value added. Tourism GDP is derived by adding net taxes on tourism products.

DATA SOURCES

Tourism consumption data

43 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.

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

45 Most of the visitor expenditure data used in the compilation of the TSA was 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 were also supplemented with data from the balance of payments and national accounts.

EXPLANATORY NOTES *continued*

Tourism consumption data continued

46 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.

47 Adjustments to the TRA data were 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 were made on the basis of models or supplementary information from either ABS or TRA surveys.

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

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

50 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. These estimates have been extrapolated for the years 1998–99 to 2005–06 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.

51 Tourism consumption at basic prices (tourism output) has been calculated by removing the net taxes, margins and imports from tourism consumption at purchaser prices. From 1998–99 to 2004–05 this was done using relationships in the supply and use tables for those years. The supply and use table for 2005–06 is not available yet. Estimates of GST for years from 2000–01 are available from the supply 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

52 Memorandum items for credit (exports) and debit (imports) 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.

53 In this publication information on Tourism Consumption, by Australian Residents : 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

EXPLANATORY NOTES *continued*

Relationship with balance of payments tourism related services continued

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.

54 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 : Inbound trips table in this publication. The most significant differences occur because the Australian TSA excludes non-resident to resident transactions which occur in other countries, i.e. delivery of services by Australian residents in other countries, or the expenditure of overseas students on long terms visas, 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

55 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 and 2003–04 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.

56 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 and 2003–04 to provide extra data for tourism characteristic industries. The ABS Economic Activity Survey (EASTAX), 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, libraries, museums and the arts, accommodation, cafes and restaurants, pubs and taverns, clubs, gambling industries and casinos.

57 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 and 2000–01 TSAs were applied to the time series. With the release of new benchmark data for 2003–04 a new set of coefficients were produced and the whole time series of TSA estimates were revised.

Employment

58 Persons employed in tourism related industries will generally provide services to both visitors and non-visitors. Tourism employment is derived somewhat simplistically 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.

59 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.

EXPLANATORY NOTES *continued*

Employment continued

Employment in these industries has been extrapolated using movements in the LFS for the updated years.

60 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

61 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

62 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

63 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 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.

64 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 completely satisfactory in various respects, including 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.

65 Tourism expenditure data are generally obtained from large scale visitor surveys that are scientifically designed to produce estimates of good quality. These data are a key component of the TSA. In order to adapt these 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 tourism gross value added could be.

66 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 (such as for other manufacturing). However, errors resulting from the use of assumptions will tend to offset in the calculation of the broad aggregates such as tourism value added and tourism GDP.

EXPLANATORY NOTES *continued*

QUALITY OF ESTIMATES

continued

67 In the extrapolated years the allocation of tourism gross output to producing industry and the derivation of tourism gross value added are based on relationships that applied in the benchmark years of 1997–98, 2000–01 and 2003–04. In compiling the 2003–04 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 the supply use tables underlying the 2005 release of the ASNA. For further information on these revisions see the feature article '*Updated National Accounts Benchmarks*' released in conjunction with the 2004–05 edition of *Australian System of National Accounts* (cat. no. 5204.0). The article is available on the ABS web site. The underlying assumption of this 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 relevant over time, extrapolated estimates only remain tenable where there is a realignment to periodic benchmarks.

68 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.

ABBREVIATIONS

ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
ANZSPC	Australian and New Zealand Standard Product Classification
DITR	Australian Government Department of Industry, Tourism and Resources
Eurostat	Statistical Office of the European Communities
GDP	gross domestic product
GST	goods and services tax
IVS	International Visitor Survey
LFS	Labour Force Survey
NVS	National Visitor Survey
OECD	Organisation for Economic Co-operation and Development
SNA93	System of National Accounts 1993
TRA	Tourism Research Australia
TSA	Tourism Satellite Account

APPENDIX 1 TOURISM PRODUCT CONCORDANCE

TOURISM RELATED PRODUCTS

The following table shows the concordance between tourism related products in the Australian Tourism Satellite Account and products in the Australian and New Zealand Standard Product Classification (ANZSPC).

TOURISM RELATED PRODUCTS

<i>Characteristic and connected tourism products</i>	<i>ANZSPC code</i>	<i>ANZSPC description</i>
Travel agency and tour operator services	6781	Travel agency and tour operator services
Taxi fares	6422	Non-scheduled road transport services of passengers
Long distance passenger transportation	661	Air transport services of passengers
	6411	Railway transport services of passengers
	6421	Scheduled road transport services of passengers
	65110	Coastal and transoceanic water transport services of passengers
Local area passenger transportation	6411	Railway transport services of passengers
	6421	Scheduled road transport services of passengers
	6521	Inland water (excluding inner harbour) transport services of passengers
Motor vehicle hire and lease	73111	Leasing or rental services concerning cars or light vans without operator
Fuel (petrol, diesel)	33301.1	Automotive petrol; refined or blended gasoline; motor spirit including aviation spirit and synthetic petrol
	33300.3	Gas or fuel oil excluding motor spirit and kerosene
Repair and maintenance of motor vehicles	87141	Maintenance and repair services of motor vehicles
	61	Wholesale trade services (part)
	62	Retail trade services (part)
Accommodation services	631	Lodging services
Actual and imputed rent on dwellings
Takeaway and restaurant meals	632	Food serving services
	633	Beverage serving services for consumption on the premises
Food products	21	Meat, fish, fruit, vegetables, oils and fats
	22	Dairy products (part)
	23	Other food products
Alcohol and other beverages	24	Beverages
	22	Dairy products (part)
Shopping (including gifts and souvenirs)	28	Knitted or crocheted fabrics; wearing apparel
	29	Leather and leather products; footwear
	381	Furniture
	448	Domestic appliances and parts thereof
	36900.2	Plastic tableware, kitchenware, other household and toilet articles
	47	Radio, television and communication equipment and apparatus
	385	Games and toys
	384	Sporting goods and accessories
	322	Books, maps, charts, plans, sheet music printed and/or published by the same unit
	328	Newspapers, journals and periodicals
	353	Soap, cleaning preparations, perfumes and toilet preparations
	382	Jewellery and related articles
	48400.1	Stop watches
	48400.9	Other watches (including metal watch straps), watch cases, clocks and parts
	29220.1	Luggage, handbags and the like

. . not applicable

APPENDIX 1 TOURISM PRODUCT CONCORDANCE *continued*

TOURISM RELATED PRODUCTS *continued*

<i>Characteristic and connected tourism products</i>	<i>ANZSPC code</i>	<i>ANZSPC description</i>
Motor vehicles, caravans, boats, etc.	61	Wholesale trade services (part)
	62	Retail trade services (part)
	492.17	Trailers and semi-trailers of the caravan type, for housing or camping
	49220.3	Trailers and semi-trailers for the transport of goods and materials (including box trailers, horse floats, tankers, stock crates, timber jinkers and boat trailers.
	49220.9	Other trailers not elsewhere classified, containers not elsewhere classified
Recreational, cultural and sporting services	494	Pleasure and sporting boats
	732	Leasing or rental services concerning other goods
	845	Library and archives services
	9642	Botanical, zoological and nature reserve services
	9641	Museum and preservation services of historical sites and buildings
	965	Sports and recreational sports services
	966	Services of athletes and related support services
	9693	Coin operated amusement machine services
	9699	Other recreational and amusement services
	96100.5	Film and video exhibition services
Gambling and betting services	9692	Gambling and betting services
Education services	92	Education services
Other tourism goods and services	25	Tobacco products
	352	Pharmaceutical products
	9312	Medical and dental services
	9311	Hospital services
	9319	Other human health services
	6753	Parking lot services
	841	Telecommunication services
	842	On-line services
	971	Washing, cleaning and dyeing services
	972	Beauty and physical well-being services
	7132	Accident and health insurance services (excluding reinsurance services)
	7133	Other non-life insurance services
	7142	Accident and health reinsurance services
	7143	Other non-life reinsurance services
	838	Photographic services and photographic processing services
	911	Administrative services of the government

APPENDIX 2 TOURISM INDUSTRY CONCORDANCE

TOURISM RELATED INDUSTRIES

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

TOURISM RELATED INDUSTRIES

<i>Characteristic and connected tourism industries</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>
Travel agency and tour operator services	6641	Travel agency services
Taxi transport	6123	Taxi and other road passenger transport
Other road transport	611	Road freight transport
	6121	Long distance bus transport
	6122	Short distance bus transport
Rail transport	62	Rail transport
Air and water transport	63	Water transport
	64	Air and space transport
Motor vehicle hiring	7741	Motor vehicle hiring
Automotive fuel retailing	5321	Automotive fuel retailing
Accommodation	5710	Accommodation
Ownership of dwellings	7711	Residential property operators
Cafes, restaurants and takeaway food outlets	5125	Takeaway food retailing
	5730	Cafes and restaurants
Food manufacturing	211	Meat and meat product manufacturing
	212	Dairy product manufacturing
	213	Fruit and vegetable processing
	214	Oil and fat manufacturing
	215	Flour mill and cereal food manufacturing
	216	Bakery product manufacturing
	217	Other food manufacturing
Beverage manufacturing	218	Beverage and malt manufacture
Transport equipment manufacturing	281	Motor vehicle and part manufacturing
	282	Other transport equipment manufacturing
Other manufacturing	219	Tobacco product manufacturing
	22	Textile, clothing, footwear and leather manufacturing
	23	Wood and paper product manufacturing
	24	Printing, publishing and recorded media
	25	Petroleum, coal, chemical and associated product manufacturing
	26	Non-metallic mineral product manufacturing
	27	Metal product manufacturing
	283	Machinery and equipment manufacturing
	284	Electronic manufacturing
	285	Electrical equipment and appliance manufacturing
	286	Industry machinery and equipment manufacturing
	29	Other manufacturing
Other retail trade	51	Food retailing (except takeaway food retailing (5125))
	52	Personal and household good retailing
	531	Motor vehicle retailing
	5322	Automotive electrical services
	5323	Smash repairing
	5324	Tyre retailing
	5329	Automotive repair and services nec
Clubs, pubs, taverns and bars	5720	Pubs, taverns and bars
	5740	Clubs (hospitality)

APPENDIX 2 TOURISM INDUSTRY CONCORDANCE *continued*

TOURISM RELATED INDUSTRIES *continued*

<i>Characteristic and connected tourism industries</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>
Casinos and other gambling services	932	Gambling services
Libraries, museums and arts	92	Libraries, museums and arts
Other entertainment services	91	Motion picture, radio and television services
	931	Sport
	933	Other recreation services
Education	84	Education
All other industries		All other industries

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 concord with the tourism related industries in the monetary tables.

TOURISM EMPLOYMENT INDUSTRIES

<i>Tourism Employment Industries</i>	<i>Tourism related industries</i>
Travel agency and tour operator services	Travel agency and tour operator services
Road transport and motor vehicle hiring	Taxi transport; other road transport; motor vehicle hiring
Rail transport	Rail transport
Air and water transport	Air and water transport
Accommodation	Accommodation
Cafes and restaurants	Cafes and restaurants
Manufacturing	Food manufacturing; beverage manufacturing; transport equipment manufacturing; other manufacturing
Retail trade	Other retail trade; automotive fuel retailing; takeaway food outlets
Clubs, pubs, taverns and bars	Clubs, pubs, taverns and bars
Casinos and other gambling services	Casinos and other gambling services
Libraries, museums and arts	Libraries, museums and arts
Other entertainment services	Other entertainment services
Education	Education
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, and 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>Purchasers' prices</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, fringe benefits tax). See also <i>Employers' social contributions</i> ; <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.
Consumption by international visitors	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by non-residents on tourism related products, including those sold at prices that are not economically significant. See also <i>Tourism consumption</i> ; <i>Tourism business and government consumption</i> ; <i>Tourism household consumption</i> .
Direct tourism demand	A direct economic impact is generated where a direct physical or economic relationship between the visitor and producer of the good or service exists. See also Indirect tourism demand.
Economically significant prices	Prices which have a significant influence on both the amounts the producers are willing to supply and the amounts purchasers wish to buy. See also <i>Basic prices</i> ; <i>Purchasers' prices</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) ■ worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers) ■ were employees who had a job but were not at work and were: on paid leave; on leave without pay for less than four weeks up to the end of the reference week; stood down without pay because of bad weather or plant breakdown at their place of employment for less than four weeks up to the end of the reference week; on strike or locked out; on workers' compensation and expected to be returning to their job; or receiving wages or salary while undertaking full-time study ■ were employers, own account workers or contributing family 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	Net expenditure on goods and services by public authorities, other than those classified as public corporations, which does not result in the creation of fixed assets or inventories or in the acquisition of land and existing buildings or second-hand assets. It comprises expenditure on compensation of employees (other than those charged to capital works, etc.), goods and services (other than fixed assets and inventories) and

GLOSSARY *continued*

Final consumption expenditure – general government *continued*

consumption of fixed capital. Expenditure on repair and maintenance of roads is included. Fees, etc., charged by general government bodies for goods sold and services rendered are offset against purchases. Net expenditure overseas by general government bodies and purchases from public corporations are included. Expenditure on defence assets that are used in a fashion similar to civilian assets is classified as gross fixed capital formation; expenditure on weapons of destruction and weapon delivery systems is classified as final consumption expenditure.

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. Gross farm product is that part of gross domestic product which arises from production in agriculture and services to agriculture. Gross non-farm product arises from production in all other industries.

Gross fixed capital formation

Expenditure on fixed assets – dwellings, other buildings and structures, machinery and equipment, livestock, intangible fixed assets 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, other buildings and structures, and machinery and equipment is measured as expenditure on new and second-hand assets, less sales of existing assets. Ownership transfer costs comprise stamp duty, real estate agents' fees and sales commissions, conveyancing fees and miscellaneous government charges.

Gross mixed income of unincorporated enterprise

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 *Intermediate consumption; Output*.

GLOSSARY *continued*

Imports of goods and services	The value of goods imported and amounts payable to non-residents for the provision of services to residents.
Indirect tourism demand	Includes downstream effects of tourism expenditure. For example, when a visitor buys a meal, indirect tourism demand is generated for the food manufacturer, the transporter, the electricity company etc., that provide the necessary inputs required to make the meal. To fully measure indirect effects, account should also be taken of the effect of changes in incomes which feed through to further changes in tourism demand. See also <i>Direct tourism demand</i> .
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 consumed as inputs by a process of production, excluding the consumption of fixed capital. See also <i>Gross value added</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 paid separately by the purchaser in taking delivery of the good.
Other taxes on production	Consists 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 on production and imports</i> and <i>Taxes on products</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 purchaser's price is 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 prices</i> ; <i>Economically significant prices</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>Taxes on products</i> .
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, 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 on production and imports</i> .

GLOSSARY *continued*

Tourism	Comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.
Tourism business and government consumption	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by resident businesses or governments, on tourism related products.
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. In the Australian Tourism Satellite Account, for an industry to be 'characteristic', 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 represent an important part of tourism consumption, or for which a significant proportion of the sales are to visitors. In the Australian TSA, for a product to be 'characteristic' it must account for at least 10 per cent of total tourism consumption and/or at least 25 per cent of the total output of the product must be consumed by visitors.
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 tourism gross value added and 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	Is the total consumption made by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination. See <i>Tourism business and government consumption</i> , <i>Tourism household consumption</i> , and <i>Consumption by international visitors</i> .
Tourism GDP	Is tourism gross value added plus taxes paid less subsidies received on tourism related products as these are reflected in prices that visitors actually pay. Tourism GDP will generally have a higher value than tourism value added. 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 tourism gross value added measure should be used when making comparisons with other industries or between countries. See <i>Tourism gross value added</i> .
Tourism gross value added	Measures the value of tourism gross output at basic prices by all industries which supply tourism products, less the value of the inputs used in producing these tourism products. 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 <i>Tourism GDP</i> .
Tourism household consumption	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by resident households on tourism related products, including those sold at prices that are not economically significant. See <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 product ratio	This is the proportion of the total supply of a product which is consumed 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

GLOSSARY *continued*

Usual environment <i>continued</i>	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 travelling to a place other than that of his/her usual environment for less than twelve months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited'.
Wages and salaries	Consist of amounts payable in cash including the value of any social contributions, income taxes, 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; Compensation of employees</i> .

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