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AUSTRALIAN NATIONAL ACCOUNTS

TOURISM
SATELLITE
ACCOUNT

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INQUIRIES

- For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070 or Dianne Bourke on Canberra (02) 6252 7243.

NOTES

ABOUT THIS PUBLICATION This publication presents the key results of the Tourism Satellite Account (TSA) for the years 1997–98 to 2002–03. Work on the TSA has been funded by the Department of Industry, Tourism and Resources (DITR).

REVISIONS IN THIS ISSUE A new benchmark TSA has been produced for 2000–01. This has resulted in revisions to the estimates for the years 1997–98 to 2001–02. These revisions arise from the use of more up to date information for 2000–01 relating to a number of the tourism characteristic industries, including information on the relationships between input and output for those industries. In addition, estimates in respect of 1997–98 have been revised for the first time as a result of adopting revisions to the annual national accounts as reflected in the annual supply and use tables. A detailed description of the revisions is given on pages 9 and 10.

The economy wide national accounting aggregates for 1997–98 to 2001–02 have been revised to make them consistent with the 2002–03 issue of *Australian System of National Accounts* (cat. no. 5204.0).

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 next expected release date of this publication is April 2005. In that issue the ABS will release estimates for 2003–04.

ABBREVIATIONS

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ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
ANZSPC	Australian and New Zealand Standard Product Classification
BTR	Bureau of Tourism Research
DISR	Department of Industry, Science and Resources
EASTAX	combined EAS and income tax data
Eurostat	statistical arm of the Commission 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
TSA	Tourism Satellite Account
UN	United Nations
WTO	World Tourism Organisation

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INTRODUCTION

INTRODUCTION

A Tourism Satellite Account has been recognised internationally as the best method for measuring the economic contribution of tourism and as an important information base for the calculation of its economic effects. 'Tourism' is defined broadly in the international standards to include visitors whose primary purpose is private or government business, as well as the more familiar tourism for leisure purposes. The first official TSA for Australia was published in *Australian National Accounts: Tourism Satellite Account 1997–98* (cat. no. 5249.0). This was followed by an update of the key results for three additional years to 2000–01 in April 2002, and an update for 2001–02 in April 2003. This current issue presents a time series from 1997–98 to 2002–03. The TSA project receives financial support from the Department of Industry, Tourism and Resources.

Tourism is not an industry in the traditional sense because industries are classified according to the goods and services that they produce, whereas tourism depends on the status of the consumer. A TSA partitions industries into tourism and non-tourism activities so that the direct contribution of tourism to the economy can be measured on a consistent basis with 'traditional' industries.

The TSA is compiled using a combination of visitor expenditure data from surveys conducted by the Bureau of Tourism Research, industry data from Australian Bureau of Statistics (ABS) collections and supply and use relationships in the Australian system of national accounts supply and use tables. Because the required industry collections are only conducted periodically, the compilation strategy is to produce a full-scale TSA 'benchmark' in those years coinciding with the availability of the industry collections (about every three years) and to extrapolate key results to other years using annual visitor expenditure data and the industry coefficients established in the latest benchmark year. This edition of the TSA presents a more comprehensive set of tourism information for 2000–01 than the previous two editions. The results for 2000–01 provide the new benchmark for extrapolating the estimates for subsequent years. The time series prior to 2000–01 have also been readjusted to the new benchmark.

The emphasis in the TSA is on the measurement of tourism consumption and the size of the tourism industry, including its contribution to gross domestic product (GDP) and employment. It puts tourism on a similar footing to other industries in the national accounts. It does not measure the indirect effects of tourism consumption on other industries. This is done using economic modelling by the Bureau of Tourism Research using the basic data provided in the TSA. The latest results are reported in the Tourism Research Report (Volume 5, No. 2 2004) *Indirect Economic Contribution of Tourism to Australia, 2001–02*.

Care should be taken in the interpretation of time series estimates between 1999–2000 and 2000–01. 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 even if the underlying volume of tourism services remained unchanged.

The concepts, sources and methods used in the TSA are described in Appendix 1.

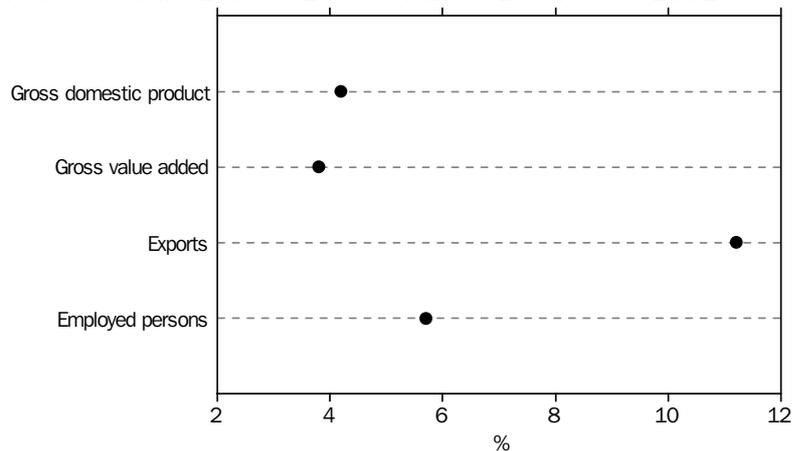
ANALYSIS OF RESULTS

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 \$32.0 billion of total GDP in 2000–03, an increase of \$1.1 billion from 2001–02. The 3.6% growth in 2002–03 compares to a growth of 5.4% in total GDP in current prices.

The TSA does not present volume estimates so the growth rates in current prices referred to in this analysis also reflect the effects of price change. One way around this problem is to compare the tourism industry's share of GDP over time. The tourism industry share of GDP was 4.2% in 2002–03, which is the lowest share of GDP since the TSA was first compiled in 1997–98. This is the second annual decline since the share peaked in 2000–01. The high tourism share of GDP in 2000–01 was largely due to price increases in tourism services resulting from the introduction of the GST and the impact of the Olympic Games. Since that time, tourism activity has been impacted by world terrorism events and the ANSETT collapse in 2000–01, and the Bali bombings and the Severe Acute Respiratory Syndrome (SARS) scare in 2002–03.

TOURISM SHARE OF THE AUSTRALIAN ECONOMY—2002–03



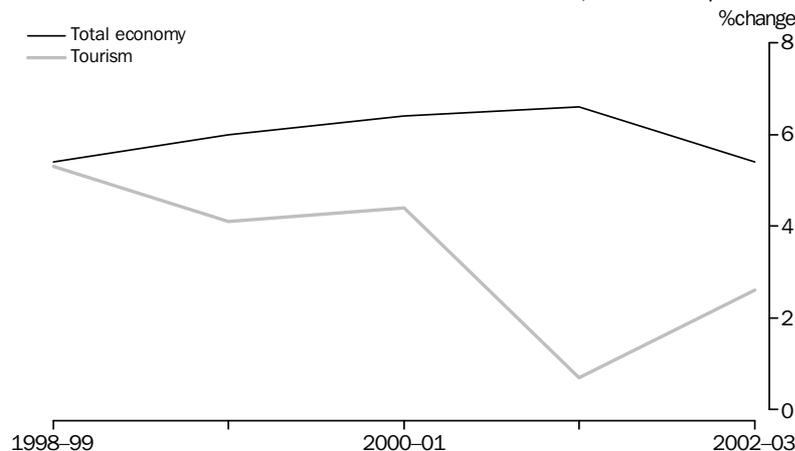
Industry gross value added measures the value of production exclusive of product taxes such as the GST. It is the preferred national accounts measure of the production of industries because it is free from distortions in prices caused by changes in tax rates or the introduction of new taxes over time. The tourism industry share of total industry gross value added in 2002–03 was 3.8%. This represents the lowest point in the series, having declined from its peak of 4.3% in 1997–98. The tourism industry share has declined because tourism gross value added has grown at a slower rate than gross value added for the whole economy.

Tourism industry gross value added grew by 2.6% in 2002–03, compared with 5.4% for the whole economy.

ANALYSIS OF RESULTS *continued*

KEY RESULTS *continued*

GROWTH IN INDUSTRY GROSS VALUE ADDED, Current prices



Tourism contributes significantly to employment and Australia's exports. The tourism industry share of total employment declined slightly in 2002-03 to 5.7%, compared with a share of 5.9% in the years 1997-98 through 2000-01. Tourism contributed 11.2% of total exports of goods and services in 2002-03, the same proportion as for 2001-02.

Domestic visitors generated 77% of tourism industry GDP in 2002-03 while international visitors generated 23%. The international visitor share of GDP has declined slightly since 2001-02. International visitor numbers declined in 2002-03 because of uncertainty surrounding world terrorism events, Severe Acute Respiratory Syndrome (SARS) and a stronger Australian dollar against currencies of our major trading partners. These events have all contributed to tourists being more likely to travel within their own country rather than travelling abroad.

TOURISM INDUSTRY GROSS VALUE ADDED

In the 2000-01 benchmark, the industries which accounted for the largest share of tourism gross value added were Air and water transport (14.9%), Accommodation (11.1%), Cafes, restaurant and takeaway food outlets (10.0%), and Other retail trade (8.5%). These shares are very similar to those in 1997-98.

TOURISM GROSS VALUE ADDED, By selected industries

	1997-98			2000-01		
	Tourism gross value added	Share of total value added	Tourism industry ratio	Tourism gross value added	Share of total value added	Tourism industry ratio
	\$m	% pts		\$m	% pts	
Air & water transport	3 211	14.7	65.0	3 727	14.9	67.1
Accommodation	2 400	11.0	89.5	2 775	11.1	90.1
Cafes, restaurants & takeaway food outlets	2 209	10.1	30.4	2 501	10.0	30.7
Other retail trade	2 079	9.5	8.4	2 124	8.5	7.8
All other industries	11 994	54.8	2.5	13 917	55.6	2.4
Total	21 894	100.0	4.3	25 044	100.0	4.1

ANALYSIS OF RESULTS *continued*

INDUSTRY RELIANCE ON TOURISM DEMAND

The tourism industry ratio measures an industry's reliance on tourism demand. Industries have been defined as 'tourism characteristic' if 25% or more of their output is purchased by visitors.

The travel agent and tour operator services industry and the accommodation industry rely almost entirely on tourism demand and have tourism industry ratios of 97% and 90% respectively for both 1997–98 and 2000–01 benchmarks. Air and water transport has the next highest ratio at 65% in 1997–98, rising to 67% in the 2000–01 benchmark.

COMPARISON WITH 'NON-TOURISM' INDUSTRIES

Tourism contributed \$25.9 billion to industry gross value added in 2002–03. When compared to the traditional industries by Australian and New Zealand Standard Industrial Classification (ANZSIC) division published in ABS statistics, 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, Personal and other services, Electricity, gas and water supply, Accommodation, cafes and restaurants, and Cultural and recreational services.

TOURISM CONSUMPTION

Total tourism consumption increased by 3% in 2002–03, recovering from a fall of 1% in 2001–02. This recovery occurred because domestic travel consumption continued to increase, even though consumption by international visitors declined. Tourism consumption by domestic households rose from \$45.9 billion to \$48.2 billion in 2002–03, an increase of 5.1%. Similarly, consumption by business and government rose from \$8.2 billion to \$8.4 billion, an increase of 2.7%. However, international visitor consumption declined from \$17.1 billion to \$16.7 billion, a decrease of 2.4%.

Domestic visitors contributed 77% of total tourism consumption in 2002–03 while the international visitors contribution was 23%. Of all domestic visitor consumption, households accounted for 87% and business/government accounted for 13%.

The bulk of domestic tourism consumption was by those visitors who stayed away overnight (78%), with day visitors accounting for the remainder (22%).

In 2002–03 Long distance passenger transportation represented the largest proportion of tourism consumption at 17%, followed by Shopping, including gifts and souvenirs (16%), Takeaway and restaurant meals (15%) and then Accommodation services (10%).

However, there are some marked differences in consumption patterns by type of visitor. Long distance passenger transportation is the dominant tourism product consumed by domestic business/government and international visitors. In contrast, domestic household visitor consumption is dominated by Takeaway and restaurant meals, and Shopping, including gifts and souvenirs.

ANALYSIS OF RESULTS *continued*

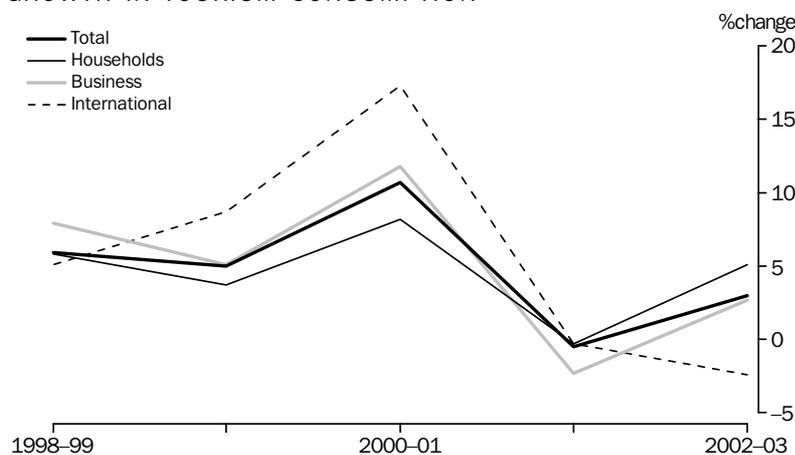
TOURISM CONSUMPTION *continued*

SHARE OF TOURISM CONSUMPTION, Selected tourism products—By type of visitor—2002–03

	<i>Households</i>	<i>Business/ government</i>	<i>International</i>	<i>All visitors</i>
	%	%	%	%
Long distance passenger transportation	8.4	39.6	28.9	16.6
Shopping (including gifts & souvenirs)	19.3	0.3	13.2	15.7
Takeaway & restaurant meals	19.6	6.5	7.2	15.3
Accommodation services	6.6	20.9	13.5	9.8
Food products	9.6	0.7	6.8	7.9
Fuel (petrol, diesel)	7.2	16.8	1.1	6.9
Taxi products	0.4	3.0	0.7	0.8
All other tourism products	29.0	12.3	28.7	27.0
Total	100.0	100.0	100.0	100.0

Tourism consumption recorded its strongest growth in 2000–01, increasing by 10.7%. The growth in 2000–01 was affected by the impact of the introduction of the GST on prices. Growth in domestic tourism was strongest in services, which attracted tax for the first time. Also, consumption on recreation, culture and sporting services were particularly boosted by expenditure on Olympics tickets. The downturn in total visitor consumption during 2001–02 reflects a levelling in the impact of the GST combined with a slight reduction in tourism demand for goods and services following the Olympics.

GROWTH IN TOURISM CONSUMPTION



INTERNATIONAL TRADE IN TOURISM

Tourism makes an important contribution to Australia's export earnings. In 2002–03, international visitors consumed \$16.7 billion worth of goods and services produced by the Australian economy. This represented 11.2% of the total exports of goods and services. While tourism exports grew quite strongly between 1997–98 and 2000–01, so did exports of other goods and services. However both tourism exports and total exports declined in both 2001–02 and 2002–03.

ANALYSIS OF RESULTS *continued*

EXPORTS OF TOURISM GOODS AND SERVICES

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
International visitor consumption (\$m)	12 792	13 445	14 610	17 140	17 081	16 666
Total exports (\$m)	113 744	112 025	126 222	153 854	153 340	148 530
Tourism share of exports (%)	11.2	12.0	11.6	11.1	11.1	11.2
Growth in international visitor consumption (%)	..	5.1	8.7	17.3	-0.3	-2.4
Growth in total exports (%)	..	-1.5	12.7	21.9	-0.3	-3.1

.. not applicable

INTERNATIONAL TRADE IN TOURISM *continued*

Exports of tourism goods and services compare favourably with Australia's 'traditional' export products. For example, exports of tourism products are greater than coal, and iron, steel and non-ferrous metals, but less than food and live animals.

SELECTED EXPORT COMMODITIES, Percentage of total exports

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
	%	%	%	%	%	%
Coal	8.4	8.3	6.6	7.0	8.8	8.1
Iron, steel, non-ferrous metals	6.3	6.2	7.0	6.6	6.3	5.9
Food and live animals	14.1	13.8	13.4	13.5	14.6	12.4
Tourism products and services	11.2	12.0	11.6	11.1	11.1	11.2

Source: *International Merchandise Exports, Australia* (cat. no. 5432.0.65.001)

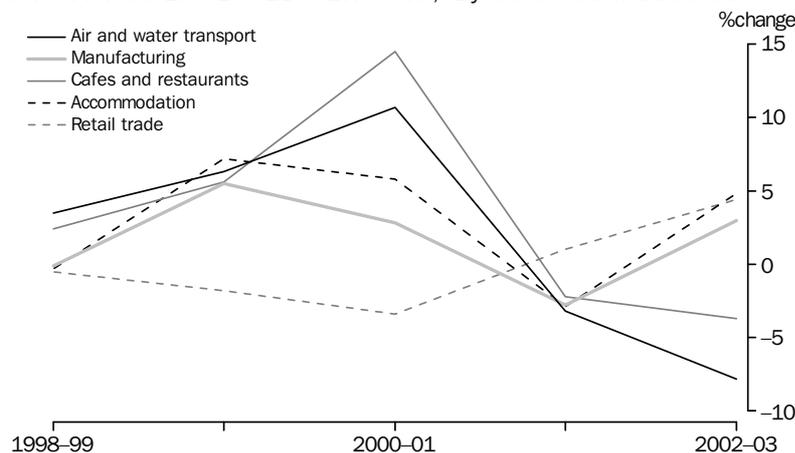
TOURISM EMPLOYED PERSONS

The tourism industry employed 540,700 persons in 2002-03. The number of tourism employed persons grew 6.3% between 1997-98 and 2002-03, slower than the growth rate in total employed persons (10.1%) over that period. Consequently, the tourism share of total employed persons fell from 5.9% in 1997-98 to 5.7% in 2002-03.

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, on average, than other forms of economic activity.

Retail trade generated the most tourism employment. Retail trade, Accommodation, and Cafes and restaurants account for more than half of the employment generated by tourism.

GROWTH IN EMPLOYED PERSONS, By selected industries



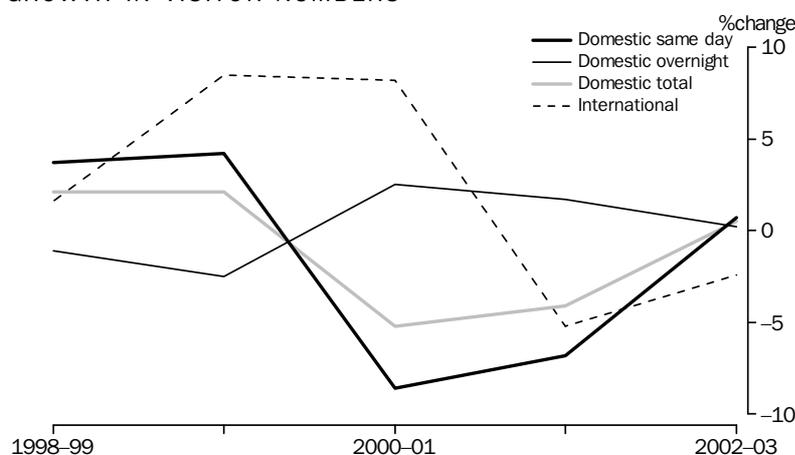
ANALYSIS OF RESULTS *continued*

VISITOR TRIPS

Trips by domestic visitors grew in 2002-03 by 1%. This follows declines in the previous two years of 5% and 4% respectively. This increase was driven by a rise in same day trips of 1%.

Short term international visitor arrivals to Australia peaked at over 5 million in 2000-01, but declined in 2001-02 and 2002-03 by 5% and 2% respectively. A combination of events have driven this decline over the last two years. A decline following the Olympics and world terrorism events had an impact in 2001-02 while Severe Acute Respiratory Syndrome and a strengthening in the Australian dollar against the currencies of our major trading partners had an impact in 2002-03.

GROWTH IN VISITOR NUMBERS



REVISIONS

For the first TSA benchmark in 1997-98, the core supply and use tables, additional industry data and tourism demand data were confronted in a supply and use framework. Because this is a lengthy and data intensive exercise it is not undertaken every year. All annual TSA updates have been produced using annual demand data from the Bureau of Tourism Research (BTR) and tourism industry estimates have been derived by extrapolating the relationships from the 1997-98 benchmark. The time series of estimates that were published in 2001-02 were based on these 1997-98 benchmark relationships. More details on these extrapolation methods are presented in Appendix 1.

The TSA methodology involves estimating a full benchmark every third year. 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. The statistics presented in this publication reflect the establishment of a new benchmark in respect of 2000-01.

In addition, the benchmark relationships established in 1997-98 have been reviewed and adjusted on the basis of revised 1997-98 supply and use tables. This has brought about some revisions to 1997-98 estimates.

As a result of now having two sets of benchmark data, the estimates for those years between 1997-98 and 2000-01 have been interpolated between the two benchmarks. Data for 2001-02 and 2002-03 have been extrapolated using the benchmark relationships from 2000-01 which has resulted in revisions to the 2001-02 estimates. Until a new TSA benchmark is applied in 2003-04, all TSA estimates for years out from

ANALYSIS OF RESULTS *continued*

REVISIONS *continued*

2000–01 will be produced using the 2000–01 relationships and annual demand data from the BTR.

Finally, a new supply and use product classification has been used in the 2000–01 benchmark, which required that estimates for previous years be re-adjusted to align with the new classification.

Compared to the estimates released in April 2003, the tourism share of GDP has been revised down across the time series. In 1997–98 the tourism share has been revised down by 0.1 percentage points to be 4.4% of total GDP, while in 2001–02 it has been revised down to be 4.3% of GDP. This has resulted from downward revisions to estimates of tourism GDP and tourism value added. Tourism GDP has been revised down by \$232 million in 1997–98 and down by \$936 million in 2001–02. Tourism value added has been revised down by \$495 million in 1997–98 and down by \$1,254 million in 2001–02. National estimates of GDP have been revised upward in 2001–02 by \$1,548 million, which also affects the calculation of the ratio.

One of the main changes to the 1997–98 TSA estimates arose from revisions to retail and wholesale margins as a result of updated information feeding into the supply and use tables from the 1998–99 Retail and Wholesale industry surveys. There have also been revisions to imports, mainly affecting motor vehicles and other tourism goods and services. In relation to taxes there has been a re-allocation of tobacco excise from intermediate consumption to households.

Because the tourism demand and supply data have been confronted for the first time for 2000–01, there have also been changes to estimates of tourism demand. One of the larger revisions has been an upward revision in consumption of accommodation by domestic households as a result of reconciling the BTR data with the industry data available from the ABS service industries survey program for 2000–01. The shares of domestic consumption between households and business were also reviewed and updated resulting in changes to the levels of household and business consumption for some products. These updated shares have been applied across the time series for each tourism product.

Tourism demand estimates for motor vehicle hire and motor vehicle repair and maintenance in 2001–02 have also been revised.

Estimates for tourism employment have been revised across all years. Revised labour force data and updated industry survey data have been used to produce revised whole economy estimates of employment. Tourism employment is derived by applying the tourism value added ratio to the employment estimates. Previously published estimates of tourism employment were based on 1997–98 tourism value added ratios. As part of the benchmarking of 2000–01 TSA estimates, new tourism value added ratios for 2000–01 have been derived and some of the 1997–98 ratios have been revised. These benchmark changes have led to revisions in the estimates of tourism employment in all years.

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TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03

TOURISM GROSS DOMESTIC PRODUCT AND ASSOCIATED STATISTICS

Tourism gross value added at basic prices (\$m)	21 894	23 054	23 994	25 044	25 229	25 875
plus Net taxes on tourism products (\$m)	3 048	3 213	3 321	5 817	5 637	6 110
equals Tourism GDP (\$m)	24 942	26 267	27 316	30 861	30 865	31 985
Gross domestic product(a) (\$m)	561 229	591 917	626 037	671 120	714 370	753 252
Tourism share of gross value added(b) (%)	4.3	4.2	4.2	4.1	3.9	3.8
Tourism share of gross domestic product(b) (%)	4.4	4.4	4.4	4.6	4.3	4.2

PERCENTAGE CHANGES (c)

Tourism gross value added at basic prices	..	5.3	4.1	4.4	0.7	2.6
Net taxes on tourism products	..	5.4	3.4	75.2	-3.1	8.4
Tourism GDP	..	5.3	4.0	13.0	—	3.6
Gross domestic product	..	5.5	5.8	7.2	6.4	5.4

.. not applicable

— nil or rounded to zero (including null cells)

(a) Source: *Australian System of National Accounts, 2002-03* (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
TOURISM INDUSTRY GDP (\$m)						
Domestic						
Households	16 931	17 789	18 276	20 055	20 342	21 497
Business/government	2 702	2 877	2 972	3 331	3 162	3 248
Total	19 632	20 666	21 248	23 387	23 504	24 745
International	5 310	5 601	6 068	7 475	7 361	7 240
Total	24 942	26 267	27 316	30 861	30 865	31 985
SHARE OF TOURISM INDUSTRY GDP (%)						
Domestic						
Households	67.9	67.7	66.9	65.0	65.9	67.2
Business/government	10.8	11.0	10.9	10.8	10.2	10.2
Total	78.7	78.7	77.8	75.8	76.2	77.4
International	21.3	21.3	22.2	24.2	23.8	22.6
Total	100.0	100.0	100.0	100.0	100.0	100.0
TOURISM INDUSTRY SHARE OF GDP (%)						
Domestic						
Households	3.0	3.0	2.9	3.0	2.8	2.9
Business/government	0.5	0.5	0.5	0.5	0.4	0.4
Total	3.5	3.5	3.4	3.5	3.3	3.3
International	0.9	0.9	1.0	1.1	1.0	1.0
Total	4.4	4.4	4.4	4.6	4.3	4.2

TOURISM INDUSTRY OUTPUT AT BASIC PRICES

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
	\$m	\$m	\$m	\$m	\$m	\$m
.....						
Tourism characteristic industries						
Travel agency and tour operator services	1 895	1 972	2 080	2 253	2 193	2 215
Taxi transport	445	501	506	559	531	537
Air and water transport	9 402	9 794	10 263	11 276	10 868	10 862
Motor vehicle hiring	712	800	864	877	886	920
Accommodation	5 541	5 889	6 103	6 906	7 105	7 258
Cafes, restaurants and food outlets	5 569	6 109	6 187	6 287	6 539	6 759
<i>Total tourism characteristic industries</i>	<i>23 564</i>	<i>25 066</i>	<i>26 002</i>	<i>28 158</i>	<i>28 123</i>	<i>28 551</i>
Tourism connected industries						
Clubs, pubs, taverns and bars	3 039	3 329	3 399	3 425	3 572	3 693
Other road transport	1 569	1 678	1 813	1 778	1 739	1 725
Rail transport	710	761	821	790	778	772
Food manufacturing	2 352	2 588	2 681	2 839	2 730	2 850
Beverage manufacturing	1 182	1 348	1 348	1 520	1 564	1 630
Transport equipment manufacturing	547	663	660	748	812	731
Other manufacturing	4 383	4 243	4 458	5 278	4 813	5 064
Automotive fuel retailing	335	335	351	364	368	370
Other retail trade	4 892	4 869	5 128	5 316	5 369	5 384
Casinos and other gambling services	253	280	280	245	269	285
Libraries, museums and arts	654	685	658	739	727	764
Other entertainment services	1 315	1 393	1 340	1 497	1 472	1 541
Education	853	1 021	1 174	1 285	1 462	1 542
Ownership of dwellings	1 527	1 645	1 746	1 859	1 987	2 075
<i>Total tourism connected industries</i>	<i>23 612</i>	<i>24 838</i>	<i>25 857</i>	<i>27 684</i>	<i>27 662</i>	<i>28 427</i>
All other industries	4 934	5 216	5 679	5 773	5 768	6 010
Total	52 111	55 119	57 537	61 614	61 553	62 987
.....						

TOURISM INDUSTRY GROSS VALUE ADDED

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
	\$m	\$m	\$m	\$m	\$m	\$m
.....						
Tourism characteristic industries						
Travel agency and tour operator services	835	869	895	992	966	975
Taxi transport	174	195	197	218	207	210
Air and water transport	3 211	3 309	3 430	3 727	3 592	3 590
Motor vehicle hiring	231	259	280	284	287	298
Accommodation	2 400	2 551	2 644	2 775	2 855	2 917
Cafes, restaurants and food outlets	2 209	2 362	2 454	2 501	2 601	2 689
<i>Total tourism characteristic industries</i>	<i>9 059</i>	<i>9 546</i>	<i>9 901</i>	<i>10 498</i>	<i>10 509</i>	<i>10 679</i>
Tourism connected industries						
Clubs, pubs, taverns and bars	1 084	1 187	1 212	1 226	1 279	1 322
Other road transport	676	704	743	709	693	687
Rail transport	379	407	439	419	412	409
Food manufacturing	593	642	655	683	657	686
Beverage manufacturing	392	446	446	503	518	540
Transport equipment manufacturing	191	217	203	206	224	201
Other manufacturing	1 473	1 392	1 385	1 568	1 430	1 505
Automotive fuel retailing	166	167	174	171	173	173
Other retail trade	2 079	2 087	2 180	2 124	2 145	2 151
Casinos and other gambling services	158	177	180	158	173	184
Libraries, museums and arts	366	397	388	446	440	462
Other entertainment services	631	664	635	705	693	726
Education	756	895	1 017	1 101	1 252	1 321
Ownership of dwellings	1 323	1 412	1 483	1 553	1 660	1 734
<i>Total tourism connected industries</i>	<i>10 268</i>	<i>10 795</i>	<i>11 139</i>	<i>11 572</i>	<i>11 748</i>	<i>12 100</i>
All other industries	2 567	2 714	2 955	2 974	2 972	3 096
<i>Total</i>	<i>21 894</i>	<i>23 054</i>	<i>23 994</i>	<i>25 044</i>	<i>25 229</i>	<i>25 875</i>
Net taxes on tourism products	3 048	3 213	3 321	5 817	5 637	6 110
Tourism GDP	24 942	26 267	27 316	30 861	30 865	31 985
.....						

	1997-98			2000-01			Change in tourism contribution
	Tourism gross value added	Industry gross value added	Tourism contribution to industry gross value added (a)	Tourism gross value added	Industry gross value added	Tourism contribution to industry gross value added (a)	
	\$m	\$m	%	\$m	\$m	%	
Tourism characteristic industries							
Travel agency and tour operator services	835	864	96.6	992	1 022	97.1	0.5
Taxi transport	174	457	38.0	218	589	37.0	-1.0
Air and water transport	3 211	4 942	65.0	3 727	5 556	67.1	2.1
Motor vehicle hiring	231	434	53.2	284	536	53.0	-0.2
Accommodation	2 400	2 684	89.5	2 775	3 081	90.1	0.6
Cafes, restaurants and food outlets	2 209	7 273	30.4	2 501	8 136	30.7	0.4
<i>Total tourism characteristic industries</i>	<i>9 059</i>	<i>16 653</i>	<i>54.4</i>	<i>10 498</i>	<i>18 920</i>	<i>55.5</i>	<i>1.1</i>
Tourism connected industries							
Clubs, pubs, taverns and bars	1 084	5 724	18.9	1 226	6 635	18.5	-0.4
Other road transport	676	8 331	8.1	709	9 617	7.4	-0.7
Rail transport	379	3 788	10.0	419	3 919	10.7	0.7
Food manufacturing	593	10 814	5.5	683	11 594	5.9	0.4
Beverage manufacturing	392	3 162	12.4	503	3 209	15.7	3.3
Transport equipment manufacturing	191	6 840	2.8	206	6 246	3.3	0.5
Other manufacturing	1 473	49 065	3.0	1 568	51 962	3.0	—
Automotive fuel retailing	166	1 618	10.3	171	1 761	9.7	-0.6
Other retail trade	2 079	24 730	8.4	2 124	27 186	7.8	-0.6
Casinos and other gambling services	158	2 193	7.2	158	2 573	6.1	-1.0
Libraries, museums and arts	366	2 275	16.1	446	2 895	15.4	-0.7
Other entertainment services	631	5 297	11.9	705	6 426	11.0	-0.9
Education	756	25 225	3.0	1 101	29 805	3.7	0.7
Ownership of dwellings	1 323	51 600	2.6	1 553	60 233	2.6	—
<i>Total tourism connected industries</i>	<i>10 268</i>	<i>200 661</i>	<i>5.1</i>	<i>11 572</i>	<i>224 061</i>	<i>5.2</i>	<i>—</i>
All other industries	2 567	297 520	0.9	2 974	369 264	0.8	-0.1
<i>Total</i>	<i>21 894</i>	<i>514 834</i>	<i>4.3</i>	<i>25 044</i>	<i>612 246</i>	<i>4.1</i>	<i>-0.2</i>
Net taxes on products	3 048	46 395	..	5 817	58 874
Tourism GDP/GDP	24 942	561 229	4.4	30 861	671 120	4.6	0.2

.. not applicable

— nil or rounded to zero (including null cells)

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

GROSS VALUE ADDED, By industry division(a)

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
TOURISM GROSS VALUE ADDED (\$m)						
Agriculture, forestry and fishing	482	547	597	640	607	632
Mining	24	19	18	19	19	22
Manufacturing	2 649	2 697	2 689	2 961	2 829	2 931
Electricity, gas and water supply	8	6	6	6	6	7
Construction	—	—	—	—	—	—
Wholesale trade	751	787	856	940	950	959
Retail trade	3 438	3 529	3 678	3 644	3 721	3 776
Accommodation, cafes and restaurants	4 501	4 825	4 985	5 153	5 332	5 477
Transport and storage	5 387	5 604	5 835	6 204	6 012	6 014
Communication services	403	416	453	408	412	441
Finance and insurance	9	10	11	10	10	11
Property and business services	267	305	334	346	357	371
Government administration and defence	89	93	101	91	92	98
Education	756	895	1 017	1 101	1 252	1 321
Health and community services	566	586	640	575	581	620
Cultural and recreational services	1 155	1 239	1 203	1 309	1 306	1 371
Personal and other services	86	83	88	82	83	90
Ownership of dwellings(b)	1 323	1 412	1 483	1 553	1 660	1 734
<i>Total</i>	<i>21 894</i>	<i>23 054</i>	<i>23 994</i>	<i>25 044</i>	<i>25 229</i>	<i>25 875</i>

TOTAL GROSS VALUE ADDED (c) (\$m)						
Agriculture, forestry and fishing	17 294	18 146	18 527	22 881	27 663	20 059
Mining	24 585	24 258	26 700	34 053	33 822	34 943
Manufacturing	69 881	70 025	71 084	73 011	76 686	80 741
Electricity, gas and water supply	13 747	14 152	14 325	15 319	15 977	16 906
Construction	31 187	34 238	38 550	34 148	39 540	45 568
Wholesale trade	28 879	30 746	32 214	33 482	36 089	39 445
Retail trade	29 977	31 538	33 012	32 769	36 034	39 412
Accommodation, cafes and restaurants	12 051	13 237	14 334	14 743	14 630	15 158
Transport and storage	28 811	30 753	31 097	32 328	34 718	36 444
Communication services	17 157	18 087	18 159	18 799	19 163	19 994
Finance and insurance	33 829	35 389	41 335	46 927	50 792	55 620
Property and business services	55 273	61 073	66 608	73 521	75 524	79 811
Government administration and defence	22 308	23 544	23 795	25 116	27 755	29 743
Education	25 225	26 750	27 683	29 805	31 201	33 560
Health and community services	31 167	33 191	35 055	38 416	41 236	44 039
Cultural and recreational services	9 712	10 156	10 770	11 895	12 470	13 201
Personal and other services	12 151	12 981	14 384	14 800	16 011	17 553
Ownership of dwellings(b)	51 600	54 567	57 606	60 233	63 326	65 613
<i>Total</i>	<i>514 834</i>	<i>542 831</i>	<i>575 238</i>	<i>612 246</i>	<i>652 637</i>	<i>687 810</i>

— nil or rounded to zero (including null cells)

(a) See Appendix 3 for a concordance between tourism related industries and the Australian and New Zealand Standard Industrial Classification.

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

(c) Source: *Australian System of National Accounts, 2002-03* (cat. no. 5204.0)

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

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
TOURISM SHARE OF GROSS VALUE ADDED (%)						
Agriculture, forestry and fishing	2.8	3.0	3.2	2.8	2.2	3.2
Mining	0.1	0.1	0.1	0.1	0.1	0.1
Manufacturing	3.8	3.9	3.8	4.1	3.7	3.6
Electricity, gas and water supply	0.1	—	—	—	—	—
Construction	—	—	—	—	—	—
Wholesale trade	2.6	2.6	2.7	2.8	2.6	2.4
Retail trade	11.5	11.2	11.1	11.1	10.3	9.6
Accommodation, cafes and restaurants	37.3	36.5	34.8	35.0	36.4	36.1
Transport and storage	18.7	18.2	18.8	19.2	17.3	16.5
Communication services	2.3	2.3	2.5	2.2	2.2	2.2
Finance and insurance	—	—	—	—	—	—
Property and business services	0.5	0.5	0.5	0.5	0.5	0.5
Government administration and defence	0.4	0.4	0.4	0.4	0.3	0.3
Education	3.0	3.3	3.7	3.7	4.0	3.9
Health and community services	1.8	1.8	1.8	1.5	1.4	1.4
Cultural and recreational services	11.9	12.2	11.2	11.0	10.5	10.4
Personal and other services	0.7	0.6	0.6	0.6	0.5	0.5
Ownership of dwellings(b)	2.6	2.6	2.6	2.6	2.6	2.6
<i>Total</i>	4.3	4.2	4.2	4.1	3.9	3.8

— nil or rounded to zero (including null cells)

(a) See Appendix 3 for a 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)

	1997-98		2000-01	
	<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>total output</i>	<i>Tourism product output</i>	<i>total output</i>
	\$m	%	\$m	%
Agriculture, forestry and fishing	1 029	2.0	1 348	2.2
Mining	60	0.1	49	0.1
Manufacturing	8 465	16.2	10 385	16.9
Electricity, gas and water supply	21	—	17	—
Construction	—	—	—	—
Wholesale trade	1 649	3.2	2 086	3.4
Retail trade	8 233	15.8	9 074	14.7
Accommodation, cafes and restaurants	10 861	20.8	12 891	20.9
Transport and storage	14 318	27.5	17 004	27.6
Communication services	863	1.7	884	1.4
Finance and insurance	16	—	17	—
Property and business services	781	1.5	996	1.6
Government administration and defence	200	0.4	205	0.3
Education	853	1.6	1 285	2.1
Health and community services	868	1.7	891	1.4
Cultural and recreational services	2 222	4.3	2 481	4.0
Personal and other services	144	0.3	141	0.2
Ownership of dwellings(b)	1 527	2.9	1 859	3.0
Total	52 111	100.0	61 614	100.0

— nil or rounded to zero (including null cells)

(a) See Appendix 3 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, By type of product

	<i>Contribution of tourism product output to total output(a)</i>	<i>Tourism product output (basic prices)</i>	<i>Imports purchased in Australia by tourists</i>	<i>Net taxes on tourism products</i>	<i>Tourism margins</i>	<i>Tourism supply (purchasers' price)</i>
	%	\$m	\$m	\$m	\$m	\$m
1997-98						
Tourism characteristic products						
Travel agency and tour operator services	96.6	1 895	—	—	—	1 895
Taxi fares	38.0	445	—	-5	—	440
Long distance passenger transportation	87.6	10 843	—	-449	—	10 395
Motor vehicle hire and lease	53.2	720	—	—	—	720
Accommodation services	96.0	5 224	—	13	—	5 237
Takeaway and restaurant meals(b)	29.6	8 419	—	—	—	8 419
Shopping (including gifts and souvenirs)	7.0	2 529	1 971	605	4 265	9 370
<i>Total tourism characteristic products</i>	<i>34.5</i>	<i>30 076</i>	<i>1 971</i>	<i>165</i>	<i>4 265</i>	<i>36 476</i>
Total tourism connected products						
Local area passenger transportation	20.4	485	—	-168	—	318
Repair and maintenance of motor vehicles	2.0	346	29	25	91	491
Fuel (petrol,diesel)	22.0	1 904	86	1 685	392	4 068
Food products	5.6	2 781	261	68	1 474	4 582
Alcoholic beverages and other beverages	16.0	1 577	131	658	284	2 650
Motor vehicles, caravans, boats, etc	5.3	459	215	127	207	1 009
Recreational, cultural and sports services	20.2	1 951	3	—	—	1 954
Gambling and betting services	7.2	535	—	168	—	703
Education	3.3	908	10	—	—	918
Actual and imputed rent on holiday houses	2.6	1 527	—	—	—	1 527
Retail margin	13.8	5 187	—	—	-5 187	—
Other margin	2.8	2 017	—	—	-2 017	—
<i>Total tourism connected products</i>	<i>6.4</i>	<i>19 677</i>	<i>736</i>	<i>2 564</i>	<i>-4 756</i>	<i>18 220</i>
Other tourism goods and services	2.4	2 357	293	320	491	3 463
Total	5.0	52 111	2 999	3 048	—	58 158
2000-01						
Tourism characteristic products						
Travel agency and tour operator services	97.1	2 253	—	19	—	2 272
Taxi fares	37.0	559	—	18	—	576
Long distance passenger transportation	91.0	12 817	—	-20	—	12 797
Motor vehicle hire and lease	53.0	882	—	43	—	925
Accommodation services	95.2	6 501	—	325	—	6 826
Takeaway and restaurant meals(b)	28.4	9 538	—	830	—	10 367
Shopping (including gifts and souvenirs)	5.4	2 275	2 810	841	5 178	11 104
<i>Total tourism characteristic products</i>	<i>34.2</i>	<i>34 826</i>	<i>2 810</i>	<i>2 054</i>	<i>5 178</i>	<i>44 868</i>
Total tourism connected products						
Local area passenger transportation	16.5	508	—	-142	—	365
Repair and maintenance of motor vehicles	1.4	373	21	37	36	467
Fuel (petrol,diesel)	18.5	3 030	177	1 904	473	5 584
Food products	5.7	3 583	350	86	1 546	5 565
Alcoholic beverages and other beverages	16.7	1 919	193	821	371	3 305
Motor vehicles, caravans, boats, etc	6.9	665	215	81	198	1 158
Recreational, cultural and sports services	19.7	2 215	37	249	—	2 501
Gambling and betting services	6.1	579	2	257	—	838
Education	4.0	1 394	22	—	—	1 416
Actual and imputed rent on holiday houses	2.6	1 859	—	—	—	1 859
Retail margin	12.4	5 620	—	—	-5 620	—
Other margin	3.4	2 626	—	—	-2 626	—
<i>Total tourism connected products</i>	<i>5.5</i>	<i>24 371</i>	<i>1 018</i>	<i>3 291</i>	<i>-5 622</i>	<i>23 058</i>
Other tourism goods and services	2.2	2 417	265	472	443	3 597
Total	4.8	61 614	4 092	5 817	—	71 524
<p>— nil or rounded to zero (including null cells)</p> <p>(a) Also referred to as the tourism product ratio.</p> <p>(b) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.</p>						

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
1997-98				
Tourism characteristic industries				
Travel agency and tour operator services	678	107	49	835
Taxi transport	98	71	4	174
Air and water transport	2 245	886	80	3 211
Motor vehicle hiring	98	124	9	231
Accommodation	2 018	314	69	2 400
Cafes, restaurants and food outlets	1 515	621	73	2 209
<i>Total tourism characteristic industries</i>	<i>6 652</i>	<i>2 122</i>	<i>285</i>	<i>9 059</i>
Tourism connected industries				
Clubs, pubs, taverns and bars	560	486	37	1 084
Other road transport	359	252	65	676
Rail transport	235	130	14	379
Food manufacturing	334	236	23	593
Beverage manufacturing	102	281	9	392
Transport equipment manufacturing	100	85	7	191
Other manufacturing	796	629	48	1 473
Automotive fuel retailing	119	39	8	166
Other retail trade	1 480	494	105	2 079
Casinos and other gambling services	44	108	5	158
Libraries, museums and arts	191	169	7	366
Other entertainment services	378	228	26	631
Education	667	80	9	756
Ownership of dwellings	..	1 240	83	1 323
<i>Total tourism connected industries</i>	<i>5 365</i>	<i>4 457</i>	<i>446</i>	<i>10 268</i>
All other industries	1 374	1 099	94	2 567
Total	13 392	7 678	824	21 894
2000-01				
Tourism characteristic industries				
Travel agency and tour operator services	807	128	58	992
Taxi transport	123	89	6	218
Air and water transport	2 792	818	116	3 727
Motor vehicle hiring	121	152	11	284
Accommodation	2 300	385	90	2 775
Cafes, restaurants and food outlets	1 762	710	29	2 501
<i>Total tourism characteristic industries</i>	<i>7 905</i>	<i>2 282</i>	<i>311</i>	<i>10 498</i>
Tourism connected industries				
Clubs, pubs, taverns and bars	597	592	38	1 226
Other road transport	389	260	60	709
Rail transport	249	149	20	419
Food manufacturing	382	274	27	683
Beverage manufacturing	133	354	17	503
Transport equipment manufacturing	131	66	9	206
Other manufacturing	892	621	56	1 568
Automotive fuel retailing	136	25	10	171
Other retail trade	1 681	315	128	2 124
Casinos and other gambling services	42	111	5	158
Libraries, museums and arts	241	198	7	446
Other entertainment services	398	270	37	705
Education	963	124	14	1 101
Ownership of dwellings	..	1 460	93	1 553
<i>Total tourism connected industries</i>	<i>6 233</i>	<i>4 818</i>	<i>521</i>	<i>11 572</i>
All other industries	1 615	1 256	104	2 974
Total	15 753	8 356	935	25 044

.. not applicable

(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

TOTAL TOURISM CONSUMPTION (\$m)

Tourism characteristic products						
Travel agency and tour operator services	1 895	1 972	2 080	2 272	2 212	2 234
Taxi fares	440	496	501	576	547	552
Long distance passenger transportation	10 395	10 880	11 465	12 797	12 233	12 191
Motor vehicle hire and lease	720	809	874	925	933	974
Accommodation services	5 237	5 579	5 803	6 826	7 023	7 167
Takeaway and restaurant meals(a)	8 419	9 236	9 352	10 367	10 768	11 181
Shopping (including gifts and souvenirs)	9 370	9 423	10 094	11 104	10 957	11 533
<i>Total tourism characteristic products</i>	<i>36 476</i>	<i>38 394</i>	<i>40 168</i>	<i>44 868</i>	<i>44 673</i>	<i>45 833</i>
Tourism connected products						
Local area passenger transportation	318	321	326	365	363	363
Repair and maintenance of motor vehicles	491	422	493	467	461	421
Fuel (petrol,diesel)	4 068	4 356	4 790	5 584	5 056	5 086
Food products	4 582	4 920	5 187	5 565	5 505	5 809
Alcoholic beverages and other beverages	2 650	2 980	3 011	3 305	3 370	3 515
Motor vehicles, caravans, boats, etc	1 009	1 157	1 151	1 158	1 216	1 172
Recreational, cultural and sports services	1 954	2 069	1 990	2 501	2 397	2 506
Gambling and betting services	703	794	826	838	858	889
Education	918	1 106	1 277	1 416	1 607	1 698
Actual and imputed rent on holiday houses	1 527	1 645	1 746	1 859	1 987	2 075
<i>Total tourism connected products</i>	<i>18 219</i>	<i>19 770</i>	<i>20 798</i>	<i>23 058</i>	<i>22 821</i>	<i>23 534</i>
Other tourism goods and services	3 463	3 411	3 668	3 597	3 651	3 940
Total	58 158	61 575	64 634	71 524	71 145	73 307

AVERAGE TOURISM CONSUMPTION (\$)

Tourism characteristic products						
Travel agency and tour operator services	8.1	8.3	8.5	9.8	10.0	10.0
Taxi fares	1.9	2.1	2.1	2.5	2.5	2.5
Long distance passenger transportation	44.5	45.6	47.0	55.3	55.1	54.6
Motor vehicle hire and lease	3.1	3.4	3.6	4.0	4.2	4.4
Accommodation services	22.4	23.4	23.8	29.5	31.6	32.1
Takeaway and restaurant meals(a)	36.1	38.7	38.4	44.8	48.5	50.1
Shopping (including gifts and souvenirs)	40.1	39.5	41.4	47.9	49.3	51.7
<i>Total tourism characteristic products</i>	<i>156.2</i>	<i>161.0</i>	<i>164.8</i>	<i>193.7</i>	<i>201.1</i>	<i>205.4</i>
Tourism connected products						
Local area passenger transportation	1.4	1.3	1.3	1.6	1.6	1.6
Repair and maintenance of motor vehicles	2.1	1.8	2.0	2.0	2.1	1.9
Fuel (petrol,diesel)	17.4	18.3	19.7	24.1	22.8	22.8
Food products	19.6	20.6	21.3	24.0	24.8	26.0
Alcoholic beverages and other beverages	11.4	12.5	12.4	14.3	15.2	15.8
Motor vehicles, caravans, boats, etc	4.3	4.9	4.7	5.0	5.5	5.3
Recreational, cultural and sports services	8.4	8.7	8.2	10.8	10.8	11.2
Gambling and betting services	3.0	3.3	3.4	3.6	3.9	4.0
Education	3.9	4.6	5.2	6.1	7.2	7.6
Actual and imputed rent on holiday houses	6.5	6.9	7.2	8.0	8.9	9.3
<i>Total tourism connected products</i>	<i>78.0</i>	<i>82.9</i>	<i>85.3</i>	<i>99.6</i>	<i>102.7</i>	<i>105.5</i>
Other tourism goods and services	14.8	14.3	15.0	15.5	16.4	17.7
Total	249.1	258.2	265.2	308.8	320.3	328.5

NUMBER OF TRIPS ('000)

<i>Total</i>	<i>233 466</i>	<i>238 434</i>	<i>243 723</i>	<i>231 615</i>	<i>222 117</i>	<i>223 132</i>
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(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
	\$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
Taxi fares	140	173	161	192	180	180
Long distance passenger transportation	3 730	3 908	4 054	4 149	4 002	4 059
Motor vehicle hire and lease	268	340	407	476	478	489
Accommodation services	2 159	2 383	2 483	2 925	3 010	3 166
Takeaway and restaurant meals(b)	7 193	7 874	7 890	8 663	9 048	9 441
Shopping (including gifts and souvenirs)	7 348	7 348	7 977	8 705	8 618	9 306
<i>Total tourism characteristic products</i>	<i>22 016</i>	<i>23 231</i>	<i>24 233</i>	<i>26 463</i>	<i>26 663</i>	<i>28 001</i>
Tourism connected products						
Local area passenger transportation	151	158	150	159	163	168
Repair and maintenance of motor vehicles	450	377	446	416	407	372
Fuel (petrol,diesel)	3 181	3 290	3 498	3 884	3 461	3 495
Food products	3 759	4 037	4 201	4 408	4 335	4 627
Alcoholic beverages and other beverages	2 248	2 547	2 526	2 729	2 793	2 921
Motor vehicles, caravans, boats, etc	912	1 053	1 041	1 025	1 060	1 050
Recreational, cultural and sports services	1 733	1 815	1 704	2 129	2 048	2 158
Gambling and betting services	494	559	602	652	688	730
Education	76	89	89	90	89	95
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688	1 763
<i>Total tourism connected products</i>	<i>14 300</i>	<i>15 321</i>	<i>15 739</i>	<i>17 064</i>	<i>16 731</i>	<i>17 377</i>
Other tourism goods and services	2 453	2 457	2 567	2 488	2 493	2 863
<i>Total</i>	<i>38 770</i>	<i>41 009</i>	<i>42 539</i>	<i>46 016</i>	<i>45 887</i>	<i>48 241</i>

DOMESTIC—BUSINESS/GOVERNMENT (a)

Tourism characteristic products						
Travel agency and tour operator services	471	506	531	559	550	563
Taxi fares	200	231	239	274	256	256
Long distance passenger transportation	2 748	2 919	3 133	3 379	3 283	3 322
Motor vehicle hire and lease	278	288	266	225	228	256
Accommodation services	1 517	1 517	1 452	1 689	1 680	1 759
Takeaway and restaurant meals(b)	407	497	496	495	518	546
Shopping (including gifts and souvenirs)	12	15	21	22	21	22
<i>Total tourism characteristic products</i>	<i>5 632</i>	<i>5 973</i>	<i>6 137</i>	<i>6 644</i>	<i>6 535</i>	<i>6 725</i>
Tourism connected products						
Local area passenger transportation	4	5	5	8	8	8
Repair and maintenance of motor vehicles	23	24	26	33	34	35
Fuel (petrol,diesel)	748	915	1 110	1 481	1 400	1 407
Food products	45	52	56	54	52	57
Alcoholic beverages and other beverages	41	42	43	42	43	53
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—
Recreational, cultural and sports services	1	1	1	—	—	—
Gambling and betting services	—	—	—	—	—	—
Education	41	45	45	45	44	47
Actual and imputed rent on holiday houses	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>902</i>	<i>1 084</i>	<i>1 286</i>	<i>1 663</i>	<i>1 581</i>	<i>1 607</i>
Other tourism goods and services	62	63	62	61	60	67
<i>Total</i>	<i>6 596</i>	<i>7 120</i>	<i>7 485</i>	<i>8 367</i>	<i>8 176</i>	<i>8 399</i>

— nil or rounded to zero (including null cells)

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

(b) 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
	\$m	\$m	\$m	\$m	\$m	\$m
TOTAL DOMESTIC (a)						
Tourism characteristic products						
Travel agency and tour operator services	1 649	1 711	1 792	1 913	1 877	1 923
Taxi fares	339	404	400	466	436	437
Long distance passenger transportation	6 477	6 826	7 187	7 528	7 285	7 381
Motor vehicle hire and lease	547	628	673	702	706	745
Accommodation services	3 677	3 900	3 935	4 614	4 690	4 925
Takeaway and restaurant meals(b)	7 600	8 371	8 385	9 158	9 566	9 987
Shopping (including gifts and souvenirs)	7 359	7 364	7 998	8 727	8 639	9 329
<i>Total tourism characteristic products</i>	<i>27 648</i>	<i>29 204</i>	<i>30 369</i>	<i>33 107</i>	<i>33 198</i>	<i>34 727</i>
Tourism connected products						
Local area passenger transportation	155	163	155	166	171	176
Repair and maintenance of motor vehicles	473	401	473	449	441	407
Fuel (petrol,diesel)	3 929	4 205	4 608	5 366	4 861	4 901
Food products	3 803	4 089	4 257	4 461	4 386	4 684
Alcoholic beverages and other beverages	2 289	2 588	2 569	2 771	2 835	2 973
Motor vehicles, caravans, boats, etc	912	1 053	1 041	1 025	1 060	1 050
Recreational, cultural and sports services	1 734	1 816	1 705	2 129	2 048	2 158
Gambling and betting services	494	559	602	652	688	730
Education	117	134	134	135	133	142
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688	1 763
<i>Total tourism connected products</i>	<i>15 202</i>	<i>16 405</i>	<i>17 026</i>	<i>18 727</i>	<i>18 312</i>	<i>18 985</i>
Other tourism goods and services	2 515	2 520	2 629	2 549	2 553	2 930
<i>Total</i>	<i>45 366</i>	<i>48 129</i>	<i>50 024</i>	<i>54 383</i>	<i>54 063</i>	<i>56 641</i>
INTERNATIONAL						
Tourism characteristic products						
Travel agency and tour operator services	246	261	288	359	335	311
Taxi fares	100	92	101	111	111	116
Long distance passenger transportation	3 918	4 053	4 278	5 269	4 948	4 810
Motor vehicle hire and lease	173	181	201	224	227	229
Accommodation services	1 560	1 678	1 868	2 212	2 333	2 242
Takeaway and restaurant meals(b)	819	865	967	1 209	1 202	1 194
Shopping (including gifts and souvenirs)	2 011	2 059	2 097	2 377	2 318	2 204
<i>Total tourism characteristic products</i>	<i>8 828</i>	<i>9 190</i>	<i>9 799</i>	<i>11 761</i>	<i>11 475</i>	<i>11 106</i>
Tourism connected products						
Local area passenger transportation	163	158	171	199	191	188
Repair and maintenance of motor vehicles	18	21	20	18	20	14
Fuel (petrol,diesel)	139	151	182	219	195	184
Food products	779	831	931	1 104	1 119	1 125
Alcoholic beverages and other beverages	361	392	442	534	535	542
Motor vehicles, caravans, boats, etc	97	104	110	134	157	121
Recreational, cultural and sports services	221	253	286	373	349	348
Gambling and betting services	209	235	225	185	169	159
Education	801	972	1 143	1 281	1 475	1 556
Actual and imputed rent on holiday houses	230	248	263	285	299	313
<i>Total tourism connected products</i>	<i>3 017</i>	<i>3 364</i>	<i>3 772</i>	<i>4 331</i>	<i>4 509</i>	<i>4 550</i>
Other tourism goods and services	948	891	1 039	1 048	1 097	1 010
<i>Total</i>	<i>12 792</i>	<i>13 445</i>	<i>14 610</i>	<i>17 140</i>	<i>17 081</i>	<i>16 666</i>

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

(b) 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
DOMESTIC (a) (\$)						
Tourism characteristic products						
Travel agency and tour operator services	7.2	7.3	7.5	8.4	8.6	8.8
Taxi fares	1.5	1.7	1.7	2.1	2.0	2.0
Long distance passenger transportation	28.3	29.2	30.1	33.2	33.5	33.8
Motor vehicle hire and lease	2.4	2.7	2.8	3.1	3.2	3.4
Accommodation services	16.0	16.7	16.5	20.4	21.6	22.5
Takeaway and restaurant meals(b)	33.2	35.7	35.1	40.4	44.0	45.7
Shopping (including gifts and souvenirs)	32.1	31.4	33.5	38.5	39.7	42.7
<i>Total tourism characteristic products</i>	<i>120.6</i>	<i>124.7</i>	<i>127.0</i>	<i>146.1</i>	<i>152.7</i>	<i>158.9</i>
Tourism connected products						
Local area passenger transportation	0.7	0.7	0.6	0.7	0.8	0.8
Repair and maintenance of motor vehicles	2.1	1.7	2.0	2.0	2.0	1.9
Fuel (petrol,diesel)	17.1	18.0	19.3	23.7	22.4	22.4
Food products	16.6	17.5	17.8	19.7	20.2	21.4
Alcoholic beverages and other beverages	10.0	11.1	10.7	12.2	13.0	13.6
Motor vehicles, caravans, boats, etc	4.0	4.5	4.4	4.5	4.9	4.8
Recreational, cultural and sports services	7.6	7.8	7.1	9.4	9.4	9.9
Gambling and betting services	2.2	2.4	2.5	2.9	3.2	3.3
Education	0.5	0.6	0.6	0.6	0.6	0.7
Actual and imputed rent on holiday houses	5.7	6.0	6.2	6.9	7.8	8.1
<i>Total tourism connected products</i>	<i>66.3</i>	<i>70.1</i>	<i>71.2</i>	<i>82.7</i>	<i>84.3</i>	<i>86.9</i>
Other tourism goods and services	11.0	10.8	11.0	11.2	11.7	13.4
Total	197.9	205.6	209.2	240.0	248.7	259.3

NUMBER OF TRIPS (DOMESTIC) ('000)

<i>Total</i>	<i>229 246</i>	<i>234 146</i>	<i>239 071</i>	<i>226 584</i>	<i>217 349</i>	<i>218 476</i>
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INTERNATIONAL (\$)

Tourism characteristic products						
Travel agency and tour operator services	58.3	60.9	61.8	71.4	70.3	66.7
Taxi fares	23.7	21.4	21.7	22.0	23.3	24.8
Long distance passenger transportation	928.4	945.3	919.7	1 047.3	1 037.8	1 033.2
Motor vehicle hire and lease	41.0	42.2	43.2	44.5	47.6	49.2
Accommodation services	369.7	391.4	401.6	439.7	489.3	481.5
Takeaway and restaurant meals(b)	194.1	201.7	207.8	240.3	252.1	256.5
Shopping (including gifts and souvenirs)	476.5	480.2	450.7	472.4	486.1	473.4
<i>Total tourism characteristic products</i>	<i>2 091.9</i>	<i>2 143.1</i>	<i>2 106.4</i>	<i>2 337.6</i>	<i>2 406.5</i>	<i>2 385.5</i>
Tourism connected products						
Local area passenger transportation	38.6	36.8	36.7	39.5	40.1	40.3
Repair and maintenance of motor vehicles	4.3	4.9	4.3	3.5	4.1	3.0
Fuel (petrol,diesel)	32.9	35.2	39.0	43.5	40.9	39.6
Food products	184.6	193.7	200.0	219.4	234.7	241.7
Alcoholic beverages and other beverages	85.5	91.4	95.0	106.1	112.2	116.4
Motor vehicles, caravans, boats, etc	23.0	24.2	23.7	26.6	32.9	26.1
Recreational, cultural and sports services	52.4	59.1	61.4	74.0	73.2	74.7
Gambling and betting services	49.5	54.8	48.3	36.8	35.5	34.1
Education	189.8	226.6	245.8	254.7	309.2	334.1
Actual and imputed rent on holiday houses	54.5	57.8	56.5	56.7	62.8	67.1
<i>Total tourism connected products</i>	<i>714.9</i>	<i>784.6</i>	<i>810.9</i>	<i>860.8</i>	<i>945.6</i>	<i>977.2</i>
Other tourism goods and services	224.6	207.9	223.4	208.4	230.1	216.9
Total	3 031.3	3 135.6	3 140.8	3 406.7	3 582.3	3 579.6

NUMBER OF TRIPS (INTERNATIONAL) ('000)

<i>Total</i>	<i>4 220</i>	<i>4 288</i>	<i>4 652</i>	<i>5 031</i>	<i>4 768</i>	<i>4 656</i>
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(a) Includes expenditure by outbound Australian residents before/after international trips.

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

DOMESTIC TOURISM CONSUMPTION, By length of stay(a)

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03

TOURISM CONSUMPTION—SAME DAY (\$m)

Tourism characteristic products						
Travel agency and tour operator services	4	5	6	6	5	6
Taxi fares	32	40	44	52	42	42
Long distance passenger transportation	409	371	419	498	411	358
Motor vehicle hire and lease	44	45	52	52	50	45
Accommodation services	—	—	—	—	—	—
Takeaway and restaurant meals(b)	1 739	2 032	2 096	2 153	2 134	2 267
Shopping (including gifts and souvenirs)	3 338	3 109	3 546	3 779	3 593	3 781
<i>Total</i>	5 567	5 602	6 162	6 540	6 235	6 500
Tourism connected products						
Local area passenger transportation	47	46	63	55	59	60
Repair and maintenance of motor vehicles	97	127	168	121	137	135
Fuel (petrol, diesel)	1 512	1 695	1 984	2 033	1 790	1 853
Food products	1 013	1 151	1 343	1 187	1 063	1 177
Alcoholic beverages and other beverages	496	538	583	546	510	557
Motor vehicles, caravans, boats, etc	474	545	540	532	550	545
Recreational, cultural and sports services	383	422	367	503	448	419
Gambling and betting services	140	212	228	247	261	277
Education	54	47	60	60	59	63
Actual and imputed rent on holiday houses	—	—	—	—	—	—
<i>Total</i>	4 217	4 785	5 336	5 283	4 877	5 085
Other tourism goods and services	863	834	910	813	702	811
Total	10 646	11 221	12 407	12 636	11 814	12 396

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
Long distance passenger transportation	2.6	2.3	2.5	3.3	2.9	2.5
Motor vehicle hire and lease	0.3	0.3	0.3	0.3	0.4	0.3
Accommodation services	—	—	—	—	—	—
Takeaway and restaurant meals(b)	11.3	12.7	12.5	14.1	15.0	15.8
Shopping (including gifts and souvenirs)	21.6	19.4	21.2	24.7	25.2	26.4
<i>Total</i>	36.0	34.9	36.9	42.8	43.8	45.4
Tourism connected products						
Local area passenger transportation	0.3	0.3	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
Fuel (petrol, diesel)	9.8	10.6	11.9	13.3	12.6	12.9
Food products	6.6	7.2	8.0	7.8	7.5	8.2
Alcoholic beverages and other beverages	3.2	3.4	3.5	3.6	3.6	3.9
Motor vehicles, caravans, boats, etc	3.1	3.4	3.2	3.5	3.9	3.8
Recreational, cultural and sports services	2.5	2.6	2.2	3.3	3.1	2.9
Gambling and betting services	0.9	1.3	1.4	1.6	1.8	1.9
Education	0.4	0.3	0.4	0.4	0.4	0.4
Actual and imputed rent on holiday houses	—	—	—	—	—	—
<i>Total</i>	27.3	29.8	31.9	34.6	34.3	35.5
Other tourism goods and services	5.6	5.2	5.4	5.3	4.9	5.7
Total	68.9	70.0	74.3	82.7	83.0	86.5

NUMBER OF TRIPS ('000)

<i>Total</i>	154 581	160 316	167 054	152 765	142 302	143 260
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— nil or rounded to zero (including null cells)

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

(b) 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
TOURISM CONSUMPTION—OVERNIGHT (\$m)						
Tourism characteristic products						
Travel agency and tour operator services	1 645	1 706	1 787	1 907	1 872	1 917
Taxi fares	307	364	356	413	393	395
Long distance passenger transportation	6 068	6 455	6 768	7 030	6 874	7 023
Motor vehicle hire and lease	503	583	621	650	656	700
Accommodation services	3 677	3 900	3 935	4 614	4 690	4 925
Takeaway and restaurant meals(b)	5 861	6 339	6 290	7 005	7 432	7 720
Shopping (including gifts and souvenirs)	4 021	4 254	4 451	4 949	5 046	5 547
<i>Total</i>	22 082	23 602	24 207	26 568	26 963	28 227
Tourism connected products						
Local area passenger transportation	107	117	93	112	112	116
Repair and maintenance of motor vehicles	375	274	305	329	304	272
Fuel (petrol, diesel)	2 416	2 510	2 624	3 333	3 071	3 048
Food products	2 790	2 938	2 914	3 275	3 323	3 507
Alcoholic beverages and other beverages	1 793	2 050	1 986	2 225	2 325	2 417
Motor vehicles, caravans, boats, etc	438	507	501	493	510	506
Recreational, cultural and sports services	1 351	1 393	1 338	1 626	1 600	1 739
Gambling and betting services	355	347	374	405	427	453
Education	63	86	74	75	74	79
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688	1 763
<i>Total</i>	10 985	11 621	11 690	13 444	13 435	13 899
Other tourism goods and services	1 653	1 685	1 719	1 735	1 852	2 119
Total	34 720	36 909	37 616	41 748	42 250	44 245
AVERAGE TOURIST CONSUMPTION—OVERNIGHT (\$)						
Tourism characteristic products						
Travel agency and tour operator services	22.0	23.1	24.8	25.8	24.9	25.5
Taxi fares	4.1	4.9	4.9	5.6	5.2	5.2
Long distance passenger transportation	81.3	87.4	94.0	95.2	91.6	93.4
Motor vehicle hire and lease	6.7	7.9	8.6	8.8	8.7	9.3
Accommodation services	49.2	52.8	54.6	62.5	62.5	65.5
Takeaway and restaurant meals(b)	78.5	85.9	87.3	94.9	99.0	102.6
Shopping (including gifts and souvenirs)	53.9	57.6	61.8	67.0	67.2	73.8
<i>Total</i>	295.7	319.7	336.1	359.9	359.3	375.3
Tourism connected products						
Local area passenger transportation	1.4	1.6	1.3	1.5	1.5	1.5
Repair and maintenance of motor vehicles	5.0	3.7	4.2	4.5	4.1	3.6
Fuel (petrol, diesel)	32.4	34.0	36.4	45.1	40.9	40.5
Food products	37.4	39.8	40.5	44.4	44.3	46.6
Alcoholic beverages and other beverages	24.0	27.8	27.6	30.1	31.0	32.1
Motor vehicles, caravans, boats, etc	5.9	6.9	7.0	6.7	6.8	6.7
Recreational, cultural and sports services	18.1	18.9	18.6	22.0	21.3	23.1
Gambling and betting services	4.7	4.7	5.2	5.5	5.7	6.0
Education	0.8	1.2	1.0	1.0	1.0	1.0
Actual and imputed rent on holiday houses	17.4	18.9	20.6	21.3	22.5	23.4
<i>Total</i>	147.1	157.4	162.3	182.1	179.0	184.8
Other tourism goods and services	22.1	22.8	23.9	23.5	24.7	28.2
Total	465.0	499.9	522.3	565.5	563.0	588.2
NUMBER OF TRIPS ('000)						
<i>Total</i>	74 665	73 830	72 017	73 819	75 047	75 216

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

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

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TOURISM CONSUMPTION, By Australian residents—outbound trips

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
Domestically produced goods and services (\$m)	2 349	2 393	2 610	2 932	2 864	2 921
Overseas produced tourism goods and services						
Purchased by businesses (\$m)	3 222	3 110	3 505	3 922	3 747	3 744
Purchased by households (\$m)	8 031	9 091	9 851	10 804	10 961	11 142
Total (\$m)	11 253	12 201	13 356	14 726	14 707	14 886
Total consumption by Australian residents on outbound trips (\$m)	13 602	14 594	15 966	17 658	17 571	17 806
Average consumption by Australian residents on outbound trips (\$)	4 486	4 577	4 791	4 936	5 217	5 407

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TOURISM CONSUMPTION, By non-residents—inbound trips

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
Overseas produced goods and services (\$m)	3 861	3 804	4 143	4 897	4 934	4 626
Domestically produced tourism goods and services						
Purchased by businesses (\$m)	1 357	1 136	1 156	1 333	1 262	1 210
Purchased by households (\$m)	11 435	12 310	13 454	15 807	15 819	15 456
Total(a) (\$m)	12 792	13 445	14 610	17 140	17 081	16 666
Total consumption by non-residents on inbound trips (\$m)	16 654	17 250	18 754	22 037	22 016	21 292
Average consumption by non-residents on inbound trips (\$)	3 946	4 023	4 032	4 380	4 617	4 573

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

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
Tourism characteristic and connected industries						
Travel agency and tour operator services ('000)	24.9	25.5	23.9	23.8	23.6	22.0
Road transport and motor vehicle hiring ('000)	24.1	24.2	23.8	24.5	25.3	25.0
Air and water transport ('000)	31.0	32.1	34.1	37.8	36.5	33.7
Accommodation ('000)	84.4	84.2	90.3	95.6	92.8	97.3
Cafes and restaurants ('000)	45.3	46.4	49.0	56.1	54.9	52.8
Clubs, pubs, taverns and bars ('000)	26.8	26.7	27.4	27.6	26.3	25.2
Rail transport ('000)	4.0	4.0	3.6	4.1	3.5	3.9
Manufacturing ('000)	42.2	42.2	44.5	45.8	44.5	45.8
Retail trade ('000)	141.0	140.2	137.8	133.1	134.4	140.4
Casinos and other gambling services ('000)	2.5	2.0	2.0	2.0	1.9	1.7
Libraries, museums and arts ('000)	8.2	8.9	8.5	10.5	10.3	10.3
Other entertainment services ('000)	14.2	14.5	15.0	14.1	15.4	16.5
Education ('000)	17.8	19.3	20.7	22.9	23.9	24.6
<i>Total tourism characteristic and connected industries ('000)</i>	<i>466.5</i>	<i>470.4</i>	<i>480.7</i>	<i>497.8</i>	<i>493.3</i>	<i>499.3</i>
All other industries ('000)	42.4	42.5	44.0	39.9	40.5	41.5
Total ('000)	508.8	512.9	524.7	537.7	533.7	540.7
Total employed persons ('000)	8 574.6	8 638.4	8 886.6	9 074.3	9 207.4	9 441.4
Tourism share of total employment (%)	5.9	5.9	5.9	5.9	5.8	5.7

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

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03
	'000	'000	'000	'000	'000	'000
Oceania & Antarctica						
New Zealand	695.7	718.9	773.1	828.4	787.7	793.1
Other	118.9	136.2	135.4	132.5	119.8	111.6
<i>Total</i>	814.6	855.0	908.6	960.9	907.5	904.7
Europe and the former USSR						
Germany	130.2	129.8	147.2	147.5	136.8	134.0
Italy	46.3	48.5	54.4	54.6	41.1	42.5
United Kingdom	445.1	483.1	554.4	605.4	627.1	644.2
Other	292.5	322.6	375.5	408.8	367.5	349.8
<i>Total</i>	914.1	984.1	1 131.5	1 216.4	1 172.2	1 170.4
Middle East & North Africa						
<i>Total</i>	36.0	46.2	52.6	57.9	56.3	50.2
Southeast Asia						
Indonesia	120.0	100.4	83.1	98.3	94.7	86.9
Malaysia	124.8	128.1	146.8	148.4	154.3	142.4
Singapore	256.9	244.5	277.0	293.3	295.8	261.6
Thailand	44.9	59.5	68.0	77.9	80.0	75.5
Other	55.6	57.9	59.4	58.7	58.0	51.3
<i>Total</i>	602.2	590.5	634.4	676.7	682.7	617.7
Northeast Asia						
China (excl. Sars and Taiwan)	71.9	81.6	105.0	143.5	172.3	177.1
Hong Kong (SAR of China)	144.3	138.7	149.0	154.1	148.6	140.7
Japan	797.0	725.8	705.5	724.2	659.2	658.6
Korea	133.2	88.4	139.4	164.6	181.1	195.8
Taiwan	154.8	147.3	140.9	124.3	99.1	80.8
Other	2.7	3.4	2.9	3.6	2.0	1.8
<i>Total</i>	1 303.9	1 185.2	1 242.7	1 314.3	1 262.4	1 254.8
Southern Asia						
<i>Total</i>	40.2	45.9	54.6	63.2	61.4	55.3
The Americas						
United States of America	355.7	393.7	436.9	502.1	424.4	423.5
Other	94.1	106.4	114.2	142.9	126.6	113.6
<i>Total</i>	449.8	500.1	551.1	645.0	551.1	537.1
Africa						
<i>Total</i>	58.3	77.8	71.9	73.2	72.7	62.7
Not Stated						
	0.9	3.2	4.4	23.7	2.0	2.7
Total	4 220.0	4 288.0	4 651.8	5 031.3	4 768.3	4 655.8

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
	'000	'000	'000	'000	'000	'000
Oceania & Antarctica						
New Zealand	429.2	477.4	506.7	574.5	592.2	615.3
Other	223.6	248.5	270.1	235.8	251.4	272.8
<i>Total</i>	652.8	725.9	776.8	810.3	843.7	888.2
Europe and the former USSR						
Germany	38.1	39.3	39.5	43.5	43.5	42.1
Italy	61.0	66.2	64.7	76.7	70.8	71.0
United Kingdom	327.4	306.0	330.2	323.2	308.0	308.9
Other	237.6	237.1	268.8	292.9	262.4	273.4
<i>Total</i>	664.1	648.7	703.3	736.4	684.8	695.3
Middle East & North Africa						
<i>Total</i>	70.0	78.4	76.8	88.3	77.0	76.6
Southeast Asia						
Indonesia	324.0	349.0	256.8	294.8	270.9	194.4
Malaysia	104.2	111.9	126.3	134.8	109.5	97.8
Singapore	115.8	133.8	145.9	153.6	163.2	119.1
Thailand	103.8	137.5	147.8	157.7	163.4	150.5
Other	115.3	121.9	124.1	156.8	153.9	160.2
<i>Total</i>	763.1	854.1	801.0	897.7	860.9	721.9
Northeast Asia						
China (excl. Sars and Taiwan)	81.6	81.8	86.3	100.6	121.3	117.9
Hong Kong (SAR of China)	142.0	142.7	149.7	156.8	142.0	114.8
Japan	56.6	62.0	64.6	67.7	71.6	72.5
Korea	17.6	17.3	19.8	23.0	23.9	24.7
Taiwan	35.3	32.4	34.9	35.8	35.4	33.2
Other	1.6	1.5	1.8	2.4	1.9	1.8
<i>Total</i>	334.7	337.7	357.0	386.4	396.1	364.8
Southern Asia						
<i>Total</i>	68.1	68.1	77.2	83.6	75.3	83.1
The Americas						
United States of America	346.2	323.9	373.7	372.6	276.0	287.4
Other	75.9	86.1	94.0	114.5	94.9	110.5
<i>Total</i>	422.1	410.0	467.7	487.1	370.8	397.9
Africa						
<i>Total</i>	51.0	50.4	57.6	52.9	56.8	63.1
Not Stated						
	6.0	15.3	15.0	34.7	2.5	2.4
Total	3 031.9	3 188.7	3 332.3	3 577.3	3 367.9	3 293.3

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

APPENDIX 1 CONCEPTS SOURCES AND METHODS

INTRODUCTION

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.

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) underlying the Australian national accounts, industries are defined on the basis of the primary goods and services which they 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.

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.

The TSA is funded by the Department of Industry, Tourism and Resources (DITR, formerly the Department of Industry, Science and Resources). The first edition of this publication was released in October 2000 for 1997–98, and has been followed by the release of annual updates since April 2002.

INTERNATIONAL STANDARDS

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 the *System of National Accounts 1993* (SNA93), which is the prevailing international standard for national accounts statistics.

The OECD also released a publication in 2000, *Measuring the Role of Tourism in OECD Economies*. Although this publication is consistent with the international standards, it 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.

DIRECT AND INDIRECT ECONOMIC IMPACTS

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.

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

DIRECT AND INDIRECT ECONOMIC IMPACTS *continued*

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 a general equilibrium model of the economy. The Bureau of Tourism Research (BTR) have used the information in the 1997–98 TSA to calculate the indirect effects of tourism using the standard input-output approach, and the results are reported in Tourism's Indirect Economic Effects 1997–98. These results have now been updated and 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*

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.

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).

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.

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

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).

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.

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.

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

- persons for whom travel is an intrinsic part of their job, e.g., bus driver, air crew
- persons who travel for the purpose of being admitted to or detained in a residential facility such as a hospital, prison or long stay care

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

Visitors continued

- 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

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.

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

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).

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.

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 nonprofit institutions.

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

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.

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 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.

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

Tourism gross value added and tourism GDP continued

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.

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

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. To include gross fixed capital formation in the tourism industry output and value added would also require that other industries be measured on a similar basis to allow for valid comparisons (e.g. the construction of a warehouse by a wholesaler would have to be attributed as output of the wholesale industry). Under such an approach the construction industry and much of the manufacturing industry would cease to exist.

The services that capital investment provide are captured to the extent that 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. Industry data for gross fixed capital expenditure presents a number of difficulties, one being that operating leases of assets are included in the industry of the lessor, not the lessee.

Classifications

Not all products and industries in the standard national accounts product and industry classifications are related to tourism. Consequently, 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.

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.

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.

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

Classifications continued

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. All remaining products and industries are classified as 'all other goods and services' or 'all other industries' in the TSA.

See Appendix 2 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 3 for a concordance between tourism related industries and industries included in the *Australian and New Zealand Standard Industrial Classification* (ANZSIC).

TOURISM SATELLITE ACCOUNT FRAMEWORK

The supply and use tables for the Australian economy provide the framework in which data for visitor's 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.

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. 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 48 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.

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.

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.

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

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 relate to 1997–98 and 2000–01.

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

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

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
- 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

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

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

Tourism consumption data

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

Tourism consumption data
continued

Most of the visitor expenditure data used in the compilation of the TSA was sourced from the BTR 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 statistics.

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.

Adjustments to the BTR 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 BTR surveys.

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. An imputation for products provided to visitors in private households was derived using indicators from the ABS Household Expenditure Survey and IVS/NVS data. These methods were used for both the benchmark and updated estimates. 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 2002–03 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.

Tourism consumption at basic prices (tourism output) has been calculated by removing the net taxes, margins and imports from tourism consumption at purchaser prices. For 1998–99, 1999–2000, 2000–01 and 2001–02 this was done using relationships in the supply and use tables for those years. The supply and use table for 2002–03 is not available yet. In relation to taxes, for the benchmark year of 2000–01, the supply and use tables reflect the GST, and these relationships have been projected forward for 2001–02 and 2002–03. 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 were calculated using a variety of sources including government budget reports, balance of payments data, and retail trade data.

International visitor expenditure of direct Olympic travellers (both athletes and spectators) has been separately estimated and included in total international visitor

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

Tourism consumption data *continued*

expenditure for 2000–01. For further details on the treatment of the Olympics in the Balance of Payments and the National Accounts refer to the feature articles:

Balance of Payments and International Investment Position, Australia (cat. no. 5302.0), *The Sydney Olympics*, September quarter 1999.

Australian National Accounts: National Income, Expenditure and Product (cat. no. 5206.0), *The Sydney Olympic Games*, September quarter 1999.

International Trade in Goods and Services (cat. no. 5368.0), *The Sydney Olympic Games Update*, July quarter 2000.

INDUSTRY DATA

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 and 2000–01 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.

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 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.

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 TSA were applied to the time series. With the release of new benchmark data for 2000–01 in this current publication, whereby a new set of coefficients have been produced, the whole time series of TSA estimates have been revised, and the estimates between 1997–98 and 2000–01 have been adjusted accordingly. There is also flexibility in update years to change coefficients where there is strong evidence that there has been structural change in tourism related industries or the Australian economy more generally.

EMPLOYMENT

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.

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 exception 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 where available. Employment in these industries has been extrapolated using movements in the labour force survey for the updated years.

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

EMPLOYMENT *continued*

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.

While the standards recognise tourism employment as a statistic of significant interest, they do not go as far as to fully recommend its inclusion because of questions about its conceptual validity. However, despite these reservations, it is a central feature of the OECD's Measuring the role of Tourism in the OECD Economies, and is presented in the Australian TSA.

OTHER VISITOR CHARACTERISTICS

Domestic visitors

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 BTR.

International arrivals and departures

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

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.

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.

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.

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

QUALITY OF ESTIMATES
continued

assumptions will tend to offset in the calculation of the broad aggregates such as tourism value added and tourism GDP.

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 held in the benchmark years of 1997–98 and 2000–01. 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.

Estimates of the number of persons employed in tourism related industries have 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.

APPENDIX 2 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 2 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
	Gambling and betting services	96100.5
Education services	9692	Gambling and betting services
Other tourism goods and services	92	Education 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	

APPENDIX 3 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 products</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

APPENDIX 3 TOURISM INDUSTRY CONCORDANCE *continued*

TOURISM RELATED INDUSTRIES *continued*

<i>Characteristic and connected tourism products</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>	
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)
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 detailed level 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 basic price is 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. Output sold at prices that are not economically significant (see also Economically significant prices) is not valued at these prices. Rather, such output is valued at its cost of production. See also <i>Purchasers' prices</i> .
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; Tourism business and government consumption; Tourism household consumption</i> .
Current prices	Estimates are defined to be in current prices when they are valued at the prices of the period to which the observation relates. For example, estimates for 1998–99 are valued at 1998–99 prices. This contrasts to chain volume measures where the prices used in valuation refer to the prices of the previous year.
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 <i>Indirect tourism demand</i> .
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; 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.
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 consumption of fixed capital. Expenditure on repair and maintenance of roads is included. Fees and other charges 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.

GLOSSARY *continued*

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 are 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	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 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 and vehicles. 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 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 value added	The value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries. See also <i>Intermediate consumption</i> ; <i>Output</i> .
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 and other businesses, 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 supply and use tables, or 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.

GLOSSARY *continued*

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	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 on production and imports	Consist of 'taxes on products' and 'other taxes on production'. These 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 on products	A tax on a product is payable per unit of some good or service. The tax 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 on a product usually becomes payable when it 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> .
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 <i>and/or</i> 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

GLOSSARY *continued*

Tourism connected industries <i>continued</i>	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 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 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited'.

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