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TOURISM SATELLITE ACCOUNT AUSTRALIAN NATIONAL ACCOUNTS

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

NOTES

ABOUT THIS PUBLICATION This publication presents the key results of the Tourism Satellite Account (TSA) for the years 1999-2000 to 2007-08. Work on the TSA has been funded by the Department of Resources, Energy and Tourism (RET). The complete TSA time series from 1997-98 to 2007-08 is available on the data cube associated with this publication on the ABS website.

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

CHANGES IN THIS ISSUE The 2007-08 publication reflects results from the annual TSA update process where estimates for the latest year are modelled using movements in visitor consumption, and consequently a less detailed set of information is presented.

REVISIONS IN THIS ISSUE Revisions have been made to the breakdown of tourism consumption by length of stay in Table 9. These revisions are at classificatory level and do not impact any other tables.

Revisions to source data used in the compilation of the TSA have also resulted in minor revisions to earlier year estimates. In particular, the following revisions impact on estimates for 2006-07:

- The allocation of total economy imports to tourism products has been revised to replace modelled estimates.
- Estimates of consumption of education by international visitors have been revised as a result of updated data from the Department of Education, Employment and workplace Relations (DEEWR).
- Economy wide national accounting aggregates have been revised to make them consistent with the 2007-08 issue of Australian System of National Accounts (cat. no. 5204.0), impacting on ratios of tourism to overall economic activity.

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.

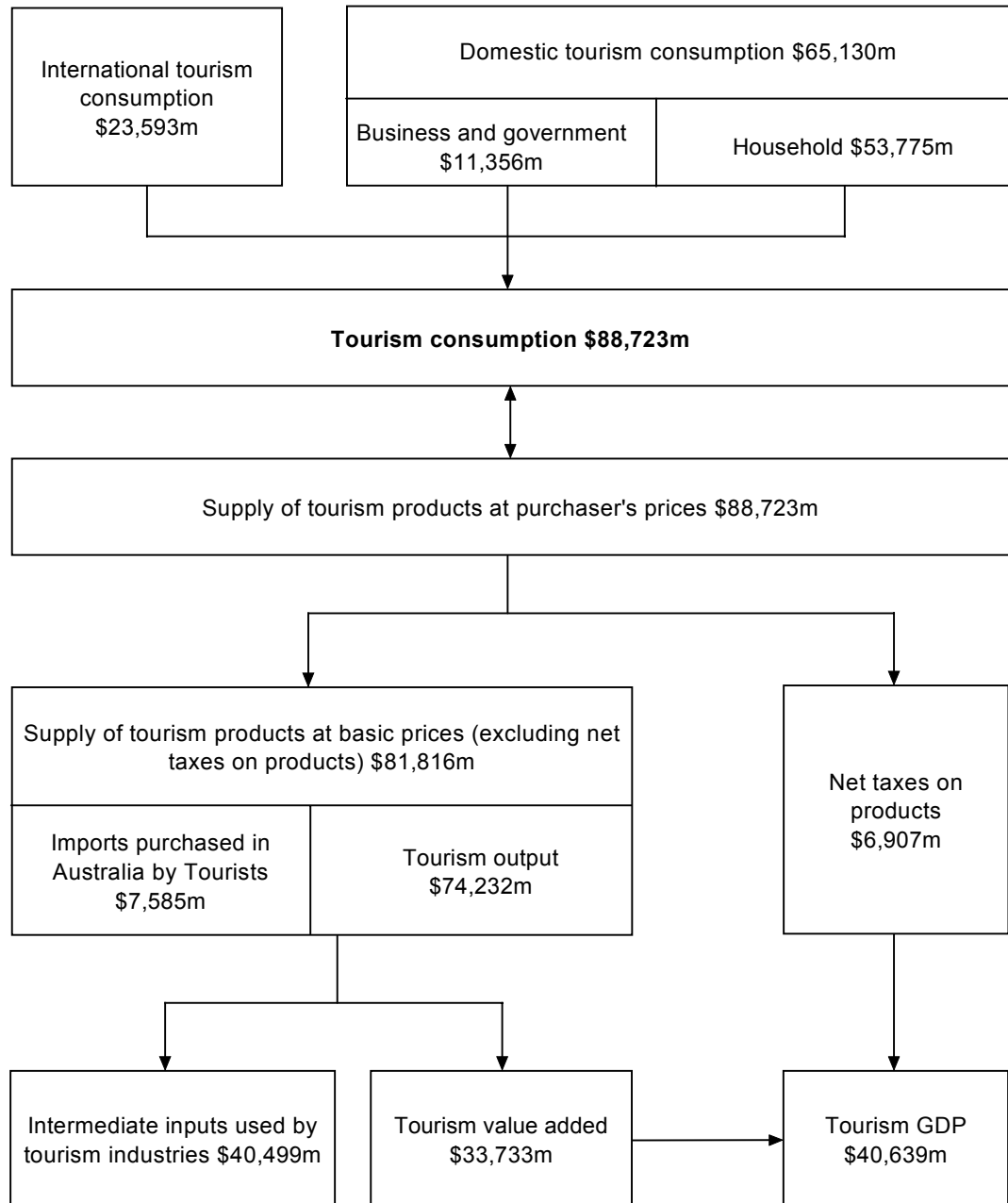
NEXT ISSUE Significant changes will be incorporated in the next issue of this publication due to the planned implementation of the Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008), Australian and New Zealand Standard Industrial Classification (ANZSIC 2006) and the System of National Accounts 2008 (SNA 2008). Coinciding with these changes, there will also be a review of some of the methods underlying the compilation of the TSA, most notably the method used to compile tourism employment.

Brian Pink
Australian Statistician

ANALYSIS OF RESULTS

KEY RESULTS

Flow of Tourism Consumption through the Australian Economy (a) Year ended June 2008

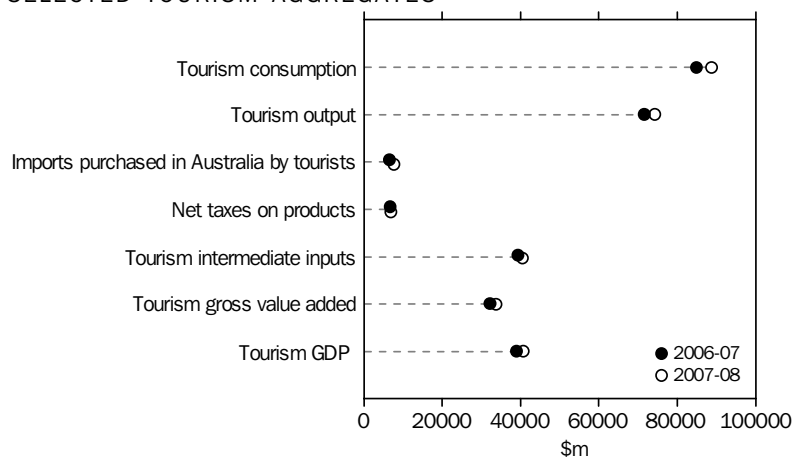


(a) Tourism consumption is measured in purchaser's prices. Other monetary aggregates are measured in basic prices unless otherwise specified.

ANALYSIS OF RESULTS *continued*

KEY RESULTS *continued*

SELECTED TOURISM AGGREGATES



Tourism consumption is the total value of goods and services consumed by visitors. It is measured in purchaser's prices (the price paid by the tourism consumer). In 2007-08 tourism consumption increased by 4.5% to \$88,723m. The receipts of Australian producers of tourism goods and services exclude product taxes like the GST and include subsidies (collectively known as net taxes). In 2007-08 tourism net taxes on products increased by 4.2% to \$6,907m. Tourism supply at basic prices (consumption less net taxes) increased by 4.6% to \$81,816m.

Imported goods and services consumed by visitors are not part of domestic production by Australian industries. Tourism imports consumed in Australia increased by 14.7% to \$7,585m in 2007-08. Domestic tourism output (supply at basic prices less imports) increased by 3.6% to \$74,232m over the same period.

When producing tourism goods and services Australian businesses use goods and services produced and supplied by other businesses. These are known as intermediate inputs. Tourism intermediate inputs increased by 2.9% to \$40,499m.

TOURISM GROSS VALUE ADDED

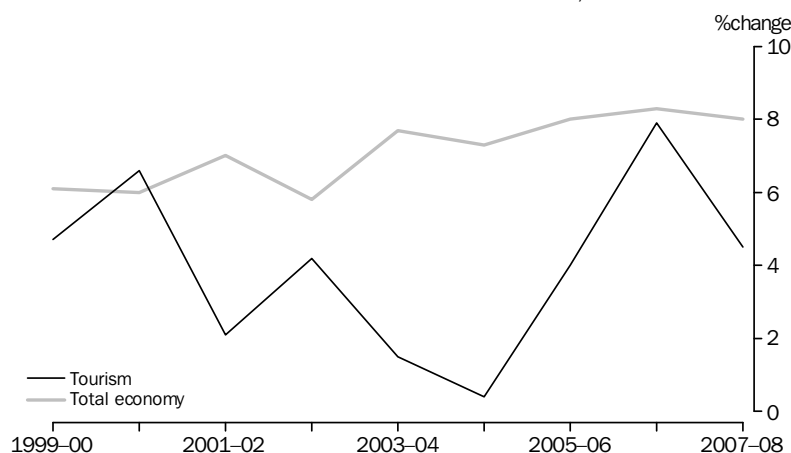
Industry gross value added measures the value of production exclusive of product taxes such as the GST. It is the preferred national accounts measure of the production of industries because it is free from distortions in prices caused by changes in tax rates or the introduction of new taxes.

Tourism gross value added is calculated by subtracting tourism intermediate inputs from tourism output at basic prices. In 2007-08 tourism gross value added increased by 4.4% to \$33,733m. Total industry gross value added increased by 8.0% to \$1,039,829m, representing a decrease in tourism share of value added from 3.4% to 3.2%. When comparing tourism to other industries and the total economy it must be understood that tourism is not a distinct industry, rather it comprises a portion of the economic activity classified to ANZSIC industries in the core national accounts.

ANALYSIS OF RESULTS *continued*

TOURISM GROSS VALUE
ADDED *continued*

GROWTH IN INDUSTRY GROSS VALUE ADDED, CURRENT PRICES



TOURISM GROSS
DOMESTIC PRODUCT
(TOURISM GDP)

Tourism GDP is calculated by adding tourism net taxes on products to tourism gross value added. In 2007-08 Tourism GDP increased by 4.4% to \$40,639m. With GDP for the Australian economy having increased by 8.3%, the tourism industry has grown at slightly more than half the rate of the total economy.

All the aggregates above are presented in current price terms, and so include the effects of price change as well as the volume of tourism activity. Volume estimates of tourism have not been compiled because of conceptual issues involved in deflating the supply side estimates. In the absence of volume estimates, the tourism share of industry GDP is presented. In 2007-08 the tourism share of GDP was 3.6%, a decrease of 0.1% on 2006-07. This is the sixth annual decrease in tourism share of GDP over the past seven years since a peak of 4.7% in 2000-01. While the peak of 4.7% in 2000-01 was heavily impacted by price increases in tourism services resulting from the introduction of the GST and the volume impact of the Olympic Games, the overall pattern of declining share has continued over a long period.

The key factors behind the fall in the tourism share of GDP in 2007-08 were that Australians travelled less in Australia and more overseas, and that non-tourism related industries grew faster than tourism related industries. Reflecting this is the moderate growth in domestic tourism consumption (4.0%), compared to total outbound expenditure by Australians travelling overseas which rose 11.9% in 2007-08.

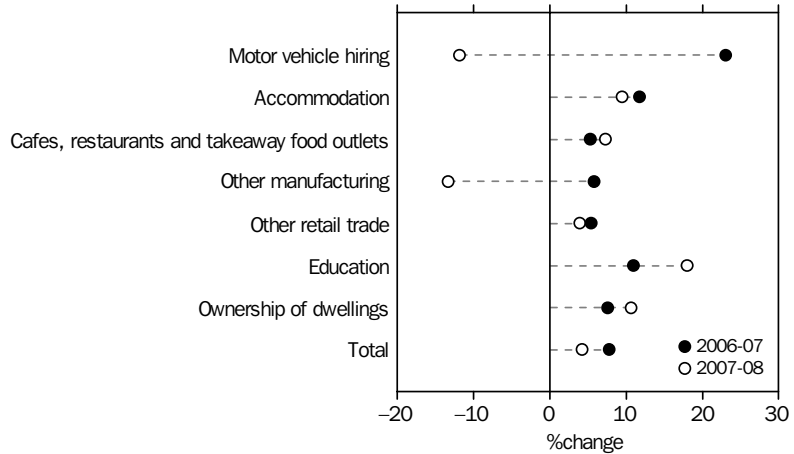
COMPONENTS OF
TOURISM INDUSTRY
GROSS VALUE ADDED

Tourism gross value added increased by \$1,437m (4.4%) in 2007-08 to \$33,733m. The largest contributors to the growth in tourism gross value added were Accommodation (up \$438m, 9.6%), Education (up \$368m, 18.0%), Ownership of dwellings (up \$234m, 10.7%), Cafes, restaurants and takeaway food outlets (up \$230m, 7.3%), and Other retail trade (up \$153m, 4.0%). The largest negative contributors were Other manufacturing (down \$130m, 12.8%), due to an increase in consumption of imported goods by visitors, and Motor vehicle hiring (down \$97m, 11.7%).

ANALYSIS OF RESULTS *continued*

COMPONENTS OF
TOURISM INDUSTRY
GROSS VALUE ADDED
continued

GROWTH IN TOURISM VALUE ADDED, SELECTED INDUSTRIES



COMPONENTS OF
TOURISM CONSUMPTION

Tourism consumption increased by 4.5% to \$88,723m following strong growth of 7.4% in 2006-07. Domestic tourism consumption increased by 4% to \$65,130m and international tourist consumption increased by 6.1% to \$23,593m.

Domestic tourism consumption represents 73.4% of total tourism consumption, whereas international consumption represents 26.6%. The international component of total tourism consumption has increased in share for the second successive year, increasing from 26.2% in 2006-07 and 25.7% in 2005-06.

GROWTH IN TOTAL, DOMESTIC AND INTERNATIONAL TOURISM CONSUMPTION



Of the 4.0% increase in domestic tourism consumption, consumption by households increased by \$2,017m (3.9%) and consumption by business and government increased by \$477m (4.4%).

The major contributors to the increase in domestic tourism consumption were Accommodation services, Takeaway and restaurant meals, and Shopping (including gifts and souvenirs). The major contributors to the increase in international tourism consumption were Education and Accommodation services.

ANALYSIS OF RESULTS *continued*

SHARE OF TOURISM CONSUMPTION, Selected tourism products—By type of visitor—2007–08

	Households	Business/government	International	All visitors
	%	%	%	%
Long distance passenger transportation	8.4	32.8	23.1	15.4
Shopping (including gifts & souvenirs)	18.5	0.1	10.9	14.1
Takeaway & restaurant meals	17.7	15.2	8.7	15.0
Accommodation services	8.7	17.8	14.5	11.4
Food products	9.9	2.5	7.4	8.3
Fuel (petrol, diesel)	8.3	14.5	1.6	7.3
Taxi fares	0.4	3.3	1.1	1.0
All other tourism products	28.1	13.8	32.7	27.5
Total	100.0	100.0	100.0	100.0

COMPONENTS OF TOURISM CONSUMPTION

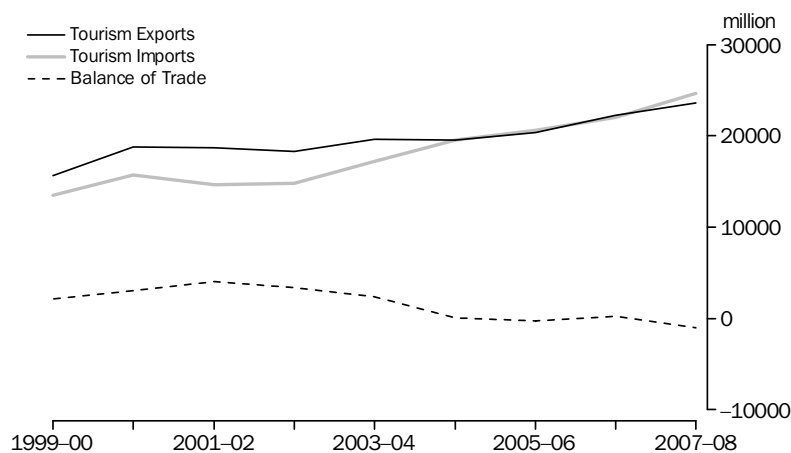
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The major contributors to total tourism consumption continue to be Long distance passenger transportation, Takeaway and restaurant meals, Shopping (including gifts and souvenirs) and Accommodation services. Combined, these products contribute 55.9% of total tourism consumption in 2007-08.

INTERNATIONAL TRADE IN TOURISM

Tourism exports are domestically produced goods and services consumed by international visitors to Australia. Tourism imports are consumption of overseas produced goods and services by Australians on overseas trips. In 2007-08 tourism imports grew faster than tourism exports, generating a deficit in the tourism balance of trade (tourism exports less tourism imports).

INTERNATIONAL TRADE IN TOURISM



TOURISM EMPLOYED PERSONS

The tourism industry employed 497,800 persons in 2007-08, an increase of 15,000 (3.1%) on 2006-07. This compares with an increase of 2.7% in total employed persons in the Australian economy. The tourism share of total employment remained steady at 4.7% when compared to 2006-07, however, over the past decade the tourism share of total employment has decreased by 0.3 percentage points.

ANALYSIS OF RESULTS *continued*

VISITOR NUMBERS

The slower annual growth in tourism consumption in 2007–08 (up 4.5%) compared with the annual growth in 2006-07 (up 7.4%) was driven mainly by a decrease in the number of visitors in 2007-08 compared with 2006-07. Between 2006-07 and 2007-08 domestic trips decreased by 1.1%, driven by decreases in the number of overnight trips (down 1.8%) and day trips (down 0.7%). International trips showed a slight decrease (down 0.2%). The overall decrease in the number of international visitors to Australia was driven mainly by falls in the number of visitors from Japan, United Kingdom and Korea.

In contrast, the number of Australians travelling overseas grew strongly by 11.2% in 2007-08, with the strong growth driven by the increased number of Australians visiting Indonesia, Thailand and United States of America.

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TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT

1999-2000 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08

TOURISM GROSS DOMESTIC PRODUCT AND ASSOCIATED STATISTICS

Tourism gross value added at basic prices (\$m)	24 919	26 557	27 111	28 251	28 665	28 779	29 944	32 296	33 733
plus Net taxes on tourism products (\$m)	3 279	5 817	5 675	5 849	5 817	5 855	6 187	6 629	6 907
equals tourism GDP (\$m)	28 199	32 374	32 786	34 101	34 483	34 634	36 131	38 925	40 639
Gross domestic product(a) (\$m)	645 058	689 262	735 714	781 675	841 351	897 642	967 454	1 045 674	1 132 172
Tourism share of gross value added(b) (%)	4.2	4.2	4.0	4.0	3.7	3.5	3.4	3.4	3.2
Tourism share of gross domestic product(b) (%)	4.4	4.7	4.5	4.4	4.1	3.9	3.7	3.7	3.6

PERCENTAGE CHANGES (c)

Tourism gross value added at basic prices (%)	4.7	6.6	2.1	4.2	1.5	0.4	4.0	7.9	4.4
plus Net taxes on tourism products (%)	6.5	77.4	-2.4	3.1	-0.5	0.7	5.7	7.1	4.2
equals tourism GDP (%)	4.9	14.8	1.3	4.0	1.1	0.4	4.3	7.7	4.4
Gross domestic product (%)	6.1	6.9	6.7	6.2	7.6	6.7	7.8	8.1	8.3

(a) Source: Australian System of National Accounts, 2007-2008 (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

1999-2000 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08

TOURISM INDUSTRY GDP (\$ m)

Domestic									
Households	18 424	20 547	20 649	21 721	21 999	22 169	22 971	24 461	25 307
Business/government	3 396	3 721	3 755	3 944	3 868	3 908	4 183	4 635	4 777
<i>Total</i>	<i>21 820</i>	<i>24 269</i>	<i>24 404</i>	<i>25 665</i>	<i>25 867</i>	<i>26 077</i>	<i>27 154</i>	<i>29 097</i>	<i>30 085</i>
International	6 377	8 106	8 379	8 436	8 616	8 557	8 977	9 828	10 555
<i>Total</i>	<i>28 199</i>	<i>32 374</i>	<i>32 786</i>	<i>34 101</i>	<i>34 483</i>	<i>34 634</i>	<i>36 131</i>	<i>38 925</i>	<i>40 639</i>

SHARE OF TOURISM INDUSTRY GDP (%)

Domestic									
Households	65.3	63.5	63.0	63.7	63.8	64.0	63.6	62.8	62.3
Business/government	12.0	11.5	11.5	11.6	11.2	11.3	11.6	11.9	11.8
<i>Total</i>	<i>77.4</i>	<i>75.0</i>	<i>74.4</i>	<i>75.3</i>	<i>75.0</i>	<i>75.3</i>	<i>75.2</i>	<i>74.8</i>	<i>74.0</i>
International	22.6	25.0	25.6	24.7	25.0	24.7	24.8	25.2	26.0
<i>Total</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>

TOURISM INDUSTRY SHARE OF GDP (%)

Domestic									
Households	2.9	3.0	2.8	2.8	2.6	2.5	2.4	2.3	2.2
Business/government	0.5	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4
<i>Total</i>	<i>3.4</i>	<i>3.5</i>	<i>3.3</i>	<i>3.3</i>	<i>3.1</i>	<i>2.9</i>	<i>2.8</i>	<i>2.8</i>	<i>2.7</i>
International	1.0	1.2	1.1	1.1	1.0	1.0	0.9	0.9	0.9
<i>Total</i>	<i>4.4</i>	<i>4.7</i>	<i>4.5</i>	<i>4.4</i>	<i>4.1</i>	<i>3.9</i>	<i>3.7</i>	<i>3.7</i>	<i>3.6</i>

TOURISM INDUSTRY OUTPUT AT BASIC PRICES

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Tourism characteristic industries									
Travel agency and tour operator services	1 936	2 009	1 955	1 969	1 928	1 912	2 058	2 201	2 270
Taxi transport	550	613	583	572	620	601	696	833	821
Air and water transport	10 218	11 049	10 579	10 323	10 226	10 509	10 933	11 702	11 936
Motor vehicle hiring	884	888	906	944	897	988	1 095	1 348	1 191
Accommodation	6 134	6 944	7 124	7 371	7 348	7 508	8 070	9 021	9 889
Cafes, restaurants and food outlets	7 690	7 864	8 156	8 450	8 424	8 512	8 821	9 291	9 972
<i>Total tourism characteristic industries</i>	<i>27 411</i>	<i>29 366</i>	<i>29 304</i>	<i>29 630</i>	<i>29 443</i>	<i>30 030</i>	<i>31 673</i>	<i>34 395</i>	<i>36 078</i>
Tourism connected industries									
Clubs, pubs, taverns and bars	1 861	1 924	1 976	2 047	2 085	2 115	2 198	2 352	2 488
Other road transport	1 944	1 818	1 775	1 792	2 007	1 987	2 081	2 276	2 208
Rail transport	841	794	782	790	923	915	965	1 076	1 086
Food manufacturing	3 147	3 442	3 276	3 418	3 377	3 229	3 488	3 831	3 808
Beverage manufacturing	1 272	1 431	1 436	1 527	1 535	1 596	1 742	2 008	1 950
Transport equipment manufacturing	632	675	734	672	632	562	674	631	531
Other manufacturing	4 400	5 211	4 597	4 594	3 791	3 299	2 846	3 010	2 624
Automotive fuel retailing	640	700	736	782	749	766	782	816	863
Other retail trade	5 384	5 964	6 285	6 681	6 343	6 444	6 554	6 912	7 189
Casinos and other gambling services	246	252	249	257	284	290	299	328	323
Libraries, museums and arts	642	733	700	731	813	803	720	775	850
Other entertainment services	1 303	1 486	1 421	1 483	1 649	1 630	1 463	1 574	1 726
Education	1 227	1 550	1 831	1 861	2 183	2 152	2 394	2 658	3 135
Ownership of dwellings	1 721	1 829	1 957	2 028	2 080	2 326	2 487	2 676	2 961
<i>Total tourism connected industries</i>	<i>25 259</i>	<i>27 809</i>	<i>27 756</i>	<i>28 663</i>	<i>28 453</i>	<i>28 115</i>	<i>28 693</i>	<i>30 925</i>	<i>31 743</i>
All other industries	6 207	6 008	5 967	6 212	6 466	6 124	6 191	6 323	6 411
Total	58 877	63 183	63 026	64 505	64 362	64 270	66 557	71 642	74 232

TOURISM INDUSTRY GROSS VALUE ADDED

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Tourism Characteristic industries									
Travel agency and tour operator services	1 211	1 136	1 106	1 113	1 245	1 235	1 329	1 421	1 465
Taxi transport	225	250	238	234	253	245	284	340	335
Air and water transport	3 126	3 286	3 459	3 795	3 632	3 734	3 884	4 156	4 241
Motor vehicle hiring	546	548	559	583	554	610	676	832	735
Accommodation	3 092	3 500	3 591	3 716	3 704	3 785	4 068	4 547	4 985
Cafes, restaurants and food outlets	2 601	2 660	2 759	2 858	2 849	2 879	2 984	3 143	3 373
<i>Total tourism characteristic industries</i>	<i>10 800</i>	<i>11 380</i>	<i>11 712</i>	<i>12 299</i>	<i>12 237</i>	<i>12 488</i>	<i>13 225</i>	<i>14 439</i>	<i>15 135</i>
Tourism Connected industries									
Clubs, pubs, taverns and bars	798	825	847	877	894	907	942	1 008	1 067
Other road transport	824	770	753	760	851	842	882	965	936
Rail transport	428	405	398	402	471	466	492	549	553
Food manufacturing	778	852	811	846	835	799	863	948	942
Beverage manufacturing	459	517	518	551	554	576	629	725	704
Transport equipment manufacturing	185	198	215	197	186	165	198	185	156
Other manufacturing	1 484	1 758	1 550	1 549	1 279	1 113	960	1 015	885
Automotive fuel retailing	202	220	232	246	236	241	246	257	272
Other retail trade	2 967	3 287	3 464	3 682	3 496	3 551	3 612	3 809	3 962
Casinos and other gambling services	138	141	139	144	159	162	167	184	181
Libraries, museums and arts	349	398	381	397	442	437	392	422	462
Other entertainment services	365	417	398	416	462	457	410	441	484
Education	946	1 195	1 411	1 435	1 683	1 659	1 846	2 049	2 417
Ownership of dwellings	1 414	1 502	1 608	1 666	1 709	1 911	2 043	2 198	2 432
<i>Total tourism connected industries</i>	<i>11 337</i>	<i>12 484</i>	<i>12 726</i>	<i>13 169</i>	<i>13 256</i>	<i>13 286</i>	<i>13 682</i>	<i>14 755</i>	<i>15 453</i>
All other industries	2 781	2 692	2 674	2 784	3 172	3 005	3 038	3 102	3 145
<i>Total</i>	<i>24 919</i>	<i>26 557</i>	<i>27 111</i>	<i>28 251</i>	<i>28 665</i>	<i>28 779</i>	<i>29 944</i>	<i>32 296</i>	<i>33 733</i>
Net taxes on tourism products	3 279	5 817	5 675	5 849	5 817	5 855	6 187	6 629	6 907
Tourism GDP	28 199	32 374	32 786	34 101	34 483	34 634	36 131	38 925	40 639

GROSS VALUE ADDED, By industry division(a)

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
TOURISM GROSS VALUE ADDED (\$ m)									
Agriculture, forestry and fishing	286	313	295	307	331	312	337	368	367
Mining	16	18	16	16	14	12	9	7	7
Manufacturing	2 914	3 331	3 102	3 151	2 862	2 661	2 659	2 884	2 698
Electricity, gas and water supply	5	6	5	5	4	4	3	2	2
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	629	581	620	663	1 028	1 060	1 076	1 117	1 178
Retail trade	4 949	5 423	5 632	5 925	5 689	5 735	5 833	6 215	6 448
Accommodation, cafes and restaurants	5 089	5 551	5 710	5 911	5 913	6 020	6 387	7 006	7 608
Transport and storage	6 094	6 102	6 207	6 562	6 797	6 866	7 228	7 820	7 913
Communication services	378	317	315	328	298	248	249	199	208
Finance and insurance	8	7	7	8	9	8	8	7	8
Property and business services	644	665	683	711	714	768	835	1 007	935
Government administration and defence	84	70	70	73	66	55	56	44	46
Education	946	1 195	1 411	1 435	1 683	1 659	1 846	2 049	2 417
Health and community services	533	446	443	463	420	349	352	281	294
Cultural and recreational services	852	956	918	957	1 063	1 056	969	1 047	1 127
Personal and other services	74	67	64	66	60	50	47	38	39
Ownership of dwellings(b)	1 418	1 506	1 612	1 670	1 714	1 917	2 049	2 204	2 439
<i>Total</i>	24 919	26 557	27 111	28 251	28 665	28 779	29 944	32 296	33 733
TOTAL GROSS VALUE ADDED (\$ m)(c)									
Agriculture, forestry and fishing	20 818	24 928	29 820	23 256	26 663	26 834	27 457	23 152	26 497
Mining	27 370	34 589	35 437	35 617	33 623	45 286	64 928	81 415	86 672
Manufacturing	78 149	79 500	81 136	88 765	95 439	96 596	99 172	103 292	108 834
Electricity, gas and water supply	14 755	16 037	17 124	18 564	19 419	20 697	22 082	21 854	24 827
Construction	39 199	33 930	39 671	44 512	51 732	57 457	62 474	72 408	82 139
Wholesale trade	31 316	32 192	35 033	39 034	41 738	43 513	45 073	47 626	50 789
Retail trade	39 854	39 846	43 695	46 836	50 767	52 750	54 728	56 342	60 144
Accommodation, cafes and restaurants	15 070	15 848	15 877	16 360	18 450	19 393	20 092	20 461	21 350
Transport and storage	29 328	30 564	32 458	34 559	37 754	41 314	43 632	48 409	53 454
Communication services	19 507	20 086	20 473	21 745	22 717	23 902	23 453	24 616	23 866
Finance and insurance	40 135	44 866	50 405	52 950	57 898	63 221	69 182	76 576	81 298
Property and business services	73 956	82 199	84 885	91 874	98 494	104 689	112 705	124 830	135 375
Government administration and defence	24 190	25 545	28 298	29 876	32 437	34 472	37 822	40 667	43 048
Education	27 821	29 763	31 295	33 618	35 430	38 377	41 138	43 036	45 382
Health and community services	35 715	38 846	41 666	44 881	48 914	52 226	56 868	61 650	65 350
Cultural and recreational services	8 538	9 405	9 871	11 210	12 643	13 195	14 091	15 571	16 174
Personal and other services	12 425	12 816	14 050	14 345	15 342	16 891	17 713	19 183	21 062
Ownership of dwellings(b)	54 486	57 163	60 610	63 048	66 691	71 046	75 349	81 410	93 567
<i>Total</i>	592 632	628 123	671 804	711 050	766 151	821 859	887 959	962 501	1 039 829

— nil or rounded to zero (including null cells)

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

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

(c) Source: Australian System of National Accounts, 2007-08 (cat. no. 5204.0).

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

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
TOURISM SHARE OF INDUSTRY GROSS VALUE ADDED (%) (b)									
Agriculture, forestry and fishing	1.4	1.3	1.0	1.3	1.2	1.2	1.2	1.6	1.4
Mining	0.1	0.1	—	—	—	—	—	—	—
Manufacturing	3.7	4.2	3.8	3.6	3.0	2.8	2.7	2.8	2.5
Electricity, gas and water supply	—	—	—	—	—	—	—	—	—
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	2.0	1.8	1.8	1.7	2.5	2.4	2.4	2.3	2.3
Retail trade	12.4	13.6	12.9	12.7	11.2	10.9	10.7	11.0	10.7
Accommodation, cafes and restaurants	33.8	35.0	36.0	36.1	32.0	31.0	31.8	34.2	35.6
Transport and storage	20.8	20.0	19.1	19.0	18.0	16.6	16.6	16.2	14.8
Communication services	1.9	1.6	1.5	1.5	1.3	1.0	1.1	0.8	0.9
Finance and insurance	—	—	—	—	—	—	—	—	—
Property and business services	0.9	0.8	0.8	0.8	0.7	0.7	0.7	0.8	0.7
Government administration and defence	0.3	0.3	0.2	0.2	0.2	0.2	0.1	0.1	0.1
Education	3.4	4.0	4.5	4.3	4.7	4.3	4.5	4.8	5.3
Health and community services	1.5	1.1	1.1	1.0	0.9	0.7	0.6	0.5	0.4
Cultural and recreational services	10.0	10.2	9.3	8.5	8.4	8.0	6.9	6.7	7.0
Personal and other services	0.6	0.5	0.5	0.5	0.4	0.3	0.3	0.2	0.2
Ownership of dwellings(c)	2.6	2.6	2.7	2.6	2.6	2.7	2.7	2.7	2.6
<i>Total</i>	4.2	4.2	4.0	4.0	3.7	3.5	3.4	3.4	3.2

— nil or rounded to zero (including null cells)

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

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

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

1999-2000 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08

TOTAL TOURISM CONSUMPTION (\$m)

Tourism characteristic products									
Travel agency and tour operator services	2 155	2 255	2 195	2 210	2 146	2 129	2 291	2 450	2 527
Taxi fares	544	631	600	589	637	617	715	855	843
Long distance passenger transportation	11 565	12 711	12 155	11 877	11 860	12 108	12 617	13 584	13 684
Motor vehicle hire and lease	948	996	1 016	1 059	1 024	1 129	1 250	1 540	1 361
Accommodation services	5 911	7 050	7 227	7 476	7 452	7 620	8 210	9 213	10 113
Takeaway and restaurant meals(a)	9 579	10 627	11 022	11 419	11 244	11 361	11 773	12 401	13 310
Shopping (including gifts and souvenirs)	10 477	11 598	11 369	11 945	12 035	12 105	11 863	12 050	12 512
<i>Total tourism characteristic products</i>	<i>41 181</i>	<i>45 868</i>	<i>45 584</i>	<i>46 575</i>	<i>46 397</i>	<i>47 069</i>	<i>48 720</i>	<i>52 094</i>	<i>54 350</i>
Tourism connected products									
Local area passenger transportation	365	388	387	390	498	500	531	609	640
Repair and maintenance of motor vehicles	491	467	462	421	433	350	357	521	429
Fuel (petrol, diesel)	4 806	5 614	5 086	5 107	4 830	4 912	5 550	6 256	6 484
Food products	5 455	5 911	5 830	6 108	6 177	6 078	6 524	7 149	7 349
Alcoholic beverages and other beverages	3 068	3 399	3 452	3 612	3 531	3 720	4 019	4 554	4 551
Motor vehicles, caravans, boats, etc	1 185	1 162	1 256	1 221	1 197	1 179	1 312	1 301	1 299
Recreational, cultural and sports services	2 060	2 601	2 486	2 594	2 823	2 790	2 502	2 693	2 953
Gambling and betting services	791	873	863	892	994	1 015	1 047	1 149	1 131
Education	1 352	1 705	2 005	2 037	2 389	2 362	2 623	2 911	3 431
Actual and imputed rent on holiday houses	1 730	1 838	1 967	2 038	2 091	2 338	2 500	2 689	2 976
<i>Total tourism connected products</i>	<i>21 302</i>	<i>23 959</i>	<i>23 793</i>	<i>24 421</i>	<i>24 963</i>	<i>25 246</i>	<i>26 964</i>	<i>29 831</i>	<i>31 241</i>
Other tourism goods and services	3 612	3 583	3 640	3 871	3 613	3 238	3 317	2 957	3 132
<i>Total</i>	<i>66 094</i>	<i>73 410</i>	<i>73 017</i>	<i>74 868</i>	<i>74 974</i>	<i>75 553</i>	<i>79 001</i>	<i>84 882</i>	<i>88 723</i>

AVERAGE TOURISM CONSUMPTION (\$)

Tourism characteristic products									
Travel agency and tour operator services	8.8	9.7	9.9	9.9	9.9	10.2	11.0	11.2	11.7
Taxi fares	2.2	2.7	2.7	2.6	2.9	3.0	3.4	3.9	3.9
Long distance passenger transportation	47.5	54.9	54.7	53.2	54.6	58.0	60.4	62.3	63.4
Motor vehicle hire and lease	3.9	4.3	4.6	4.7	4.7	5.4	6.0	7.1	6.3
Accommodation services	24.3	30.4	32.5	33.5	34.3	36.5	39.3	42.3	46.9
Takeaway and restaurant meals(a)	39.3	45.9	49.6	51.2	51.7	54.4	56.3	56.9	61.7
Shopping (including gifts and souvenirs)	43.0	50.1	51.2	53.5	55.4	58.0	56.8	55.3	58.0
<i>Total tourism characteristic products</i>	<i>169.0</i>	<i>198.0</i>	<i>205.2</i>	<i>208.7</i>	<i>213.5</i>	<i>225.5</i>	<i>233.1</i>	<i>238.9</i>	<i>251.9</i>
Tourism connected products									
Local area passenger transportation	1.5	1.7	1.7	1.7	2.3	2.4	2.5	2.8	3.0
Repair and maintenance of motor vehicles	2.0	2.0	2.1	1.9	2.0	1.7	1.7	2.4	2.0
Fuel (petrol, diesel)	19.7	24.2	22.9	22.9	22.2	23.5	26.6	28.7	30.1
Food products	22.4	25.5	26.2	27.4	28.4	29.1	31.2	32.8	34.1
Alcoholic beverages and other beverages	12.6	14.7	15.5	16.2	16.3	17.8	19.2	20.9	21.1
Motor vehicles, caravans, boats, etc	4.9	5.0	5.7	5.5	5.5	5.6	6.3	6.0	6.0
Recreational, cultural and sports services	8.5	11.2	11.2	11.6	13.0	13.4	12.0	12.4	13.7
Gambling and betting services	3.2	3.8	3.9	4.0	4.6	4.9	5.0	5.3	5.2
Education	5.5	7.4	9.0	9.1	11.0	11.3	12.5	13.3	15.9
Actual and imputed rent on holiday houses	7.1	7.9	8.9	9.1	9.6	11.2	12.0	12.3	13.8
<i>Total tourism connected products</i>	<i>87.4</i>	<i>103.4</i>	<i>107.1</i>	<i>109.4</i>	<i>114.9</i>	<i>120.9</i>	<i>129.0</i>	<i>136.8</i>	<i>144.8</i>
Other tourism goods and services	14.8	15.5	16.4	17.4	16.6	15.5	15.9	13.6	14.5
<i>Total</i>	<i>271.2</i>	<i>316.9</i>	<i>328.7</i>	<i>335.5</i>	<i>345.0</i>	<i>362.0</i>	<i>378.0</i>	<i>389.3</i>	<i>411.2</i>

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

TOURISM CONSUMPTION, By type of visitor

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
DOMESTIC HOUSEHOLDS (a)									
Tourism characteristic products									
Travel agency and tour operator services	1 314	1 343	1 321	1 349	1 314	1 299	1 447	1 569	1 630
Taxi fares	162	193	180	172	156	153	186	227	213
Long distance passenger transportation	3 885	3 861	3 753	3 709	3 694	3 679	4 031	4 496	4 502
Motor vehicle hire and lease	429	506	506	517	516	599	649	817	682
Accommodation services	2 834	3 279	3 364	3 530	3 506	3 694	3 844	4 231	4 666
Takeaway and restaurant meals(b)	7 213	7 844	8 167	8 512	8 080	8 211	8 536	8 907	9 535
Shopping (including gifts and souvenirs)	8 294	9 039	8 915	9 613	9 614	9 726	9 572	9 544	9 929
<i>Total tourism characteristic products</i>	<i>24 133</i>	<i>26 065</i>	<i>26 205</i>	<i>27 403</i>	<i>26 881</i>	<i>27 361</i>	<i>28 265</i>	<i>29 791</i>	<i>31 156</i>
Tourism connected products									
Local area passenger transportation	153	160	167	171	148	155	188	247	254
Repair and maintenance of motor vehicles	446	416	407	372	305	245	247	367	293
Fuel (petrol, diesel)	3 498	3 884	3 467	3 495	3 346	3 402	3 833	4 314	4 457
Food products	4 230	4 450	4 362	4 644	4 541	4 466	4 834	5 213	5 323
Alcoholic beverages and other beverages	2 334	2 518	2 565	2 689	2 538	2 722	2 960	3 344	3 295
Motor vehicles, caravans, boats, etc	1 041	1 025	1 061	1 051	1 022	980	962	982	969
Recreational, cultural and sports services	1 770	2 204	2 115	2 225	2 359	2 397	2 133	2 288	2 495
Gambling and betting services	602	652	688	730	791	854	911	998	1 007
Education	91	92	91	97	108	117	124	131	138
Actual and imputed rent on holiday houses	1 474	1 566	1 679	1 716	1 716	1 930	2 056	2 220	2 455
<i>Total tourism connected products</i>	<i>15 640</i>	<i>16 969</i>	<i>16 603</i>	<i>17 190</i>	<i>16 875</i>	<i>17 268</i>	<i>18 248</i>	<i>20 105</i>	<i>20 685</i>
Other tourism goods and services	2 545	2 461	2 468	2 834	2 590	2 200	2 235	1 862	1 933
<i>Total</i>	<i>42 317</i>	<i>45 495</i>	<i>45 276</i>	<i>47 427</i>	<i>46 345</i>	<i>46 830</i>	<i>48 748</i>	<i>51 758</i>	<i>53 775</i>
DOMESTIC BUSINESS/GOVERNMENT (a)									
Tourism characteristic products									
Travel agency and tour operator services	548	556	548	560	568	559	591	638	653
Taxi fares	240	275	257	246	279	272	326	399	372
Long distance passenger transportation	2 953	3 074	3 014	2 952	3 012	3 046	3 291	3 573	3 722
Motor vehicle hire and lease	268	228	230	258	205	240	254	319	273
Accommodation services	1 212	1 518	1 499	1 569	1 518	1 556	1 685	1 843	2 020
Takeaway and restaurant meals(b)	1 171	1 306	1 393	1 468	1 406	1 433	1 493	1 552	1 722
Shopping (including gifts and souvenirs)	22	17	15	15	7	7	10	8	8
<i>Total tourism characteristic products</i>	<i>6 414</i>	<i>6 973</i>	<i>6 955</i>	<i>7 067</i>	<i>6 994</i>	<i>7 114</i>	<i>7 650</i>	<i>8 332</i>	<i>8 770</i>
Tourism connected products									
Local area passenger transportation	6	8	8	9	19	19	25	31	30
Repair and maintenance of motor vehicles	27	33	34	35	110	84	85	131	105
Fuel (petrol, diesel)	1 110	1 481	1 401	1 406	1 250	1 253	1 408	1 591	1 642
Food products	222	229	232	245	245	242	264	279	286
Alcoholic beverages and other beverages	278	307	318	329	308	335	367	404	403
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—	—	—	—
Recreational, cultural and sports services	8	9	8	8	4	4	4	3	4
Gambling and betting services	—	—	—	—	—	—	—	—	—
Education	47	49	48	51	60	64	66	67	69
Actual and imputed rent on holiday houses	—	—	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>1 698</i>	<i>2 116</i>	<i>2 049</i>	<i>2 083</i>	<i>1 996</i>	<i>2 002</i>	<i>2 219</i>	<i>2 507</i>	<i>2 539</i>
Other tourism goods and services	42	37	37	43	46	47	36	39	47
<i>Total</i>	<i>8 154</i>	<i>9 126</i>	<i>9 041</i>	<i>9 194</i>	<i>9 037</i>	<i>9 163</i>	<i>9 904</i>	<i>10 879</i>	<i>11 356</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.

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
INTERNATIONAL									
Tourism characteristic products									
Travel agency and tour operator services	292	356	326	302	265	270	254	243	245
Taxi fares	142	162	164	171	202	191	202	230	258
Long distance passenger transportation	4 727	5 776	5 389	5 216	5 154	5 383	5 294	5 514	5 460
Motor vehicle hire and lease	251	262	280	284	303	291	348	404	405
Accommodation services	1 865	2 253	2 364	2 377	2 428	2 370	2 681	3 139	3 427
Takeaway and restaurant meals(a)	1 195	1 477	1 462	1 438	1 757	1 717	1 745	1 942	2 053
Shopping (including gifts and souvenirs)	2 161	2 542	2 439	2 318	2 413	2 371	2 281	2 498	2 575
<i>Total tourism characteristic products</i>	<i>10 634</i>	<i>12 829</i>	<i>12 424</i>	<i>12 106</i>	<i>12 523</i>	<i>12 593</i>	<i>12 805</i>	<i>13 970</i>	<i>14 423</i>
Tourism connected products									
Local area passenger transportation	206	220	211	210	331	327	318	331	355
Repair and maintenance of motor vehicles	18	18	21	15	18	21	25	23	31
Fuel (petrol, diesel)	198	249	218	205	234	257	309	350	386
Food products	1 003	1 232	1 235	1 219	1 390	1 370	1 426	1 656	1 740
Alcoholic beverages and other beverages	456	573	569	594	685	664	692	806	853
Motor vehicles, caravans, boats, etc	143	137	195	170	175	199	350	318	330
Recreational, cultural and sports services	283	388	363	361	460	389	365	402	454
Gambling and betting services	189	220	174	162	203	161	135	151	124
Education	1 214	1 564	1 866	1 889	2 221	2 180	2 433	2 712	3 223
Actual and imputed rent on holiday houses	255	272	288	322	374	408	444	469	521
<i>Total tourism connected products</i>	<i>3 965</i>	<i>4 874</i>	<i>5 141</i>	<i>5 147</i>	<i>6 092</i>	<i>5 976</i>	<i>6 498</i>	<i>7 220</i>	<i>8 017</i>
Other tourism goods and services	1 025	1 086	1 135	994	978	990	1 046	1 056	1 153
<i>Total</i>	<i>15 623</i>	<i>18 789</i>	<i>18 700</i>	<i>18 247</i>	<i>19 592</i>	<i>19 560</i>	<i>20 349</i>	<i>22 246</i>	<i>23 593</i>
TOTAL TOURISM CONSUMPTION									
Tourism characteristic products									
Travel agency and tour operator services	2 155	2 255	2 195	2 210	2 146	2 129	2 291	2 450	2 527
Taxi fares	544	631	600	589	637	617	715	855	843
Long distance passenger transportation	11 565	12 711	12 155	11 877	11 860	12 108	12 617	13 584	13 684
Motor vehicle hire and lease	948	996	1 016	1 059	1 024	1 129	1 250	1 540	1 361
Accommodation services	5 911	7 050	7 227	7 476	7 452	7 620	8 210	9 213	10 113
Takeaway and restaurant meals(a)	9 579	10 627	11 022	11 419	11 244	11 361	11 773	12 401	13 310
Shopping (including gifts and souvenirs)	10 477	11 598	11 369	11 945	12 035	12 105	11 863	12 050	12 512
<i>Total tourism characteristic products</i>	<i>41 181</i>	<i>45 868</i>	<i>45 584</i>	<i>46 575</i>	<i>46 397</i>	<i>47 069</i>	<i>48 720</i>	<i>52 094</i>	<i>54 350</i>
Tourism connected products									
Local area passenger transportation	365	388	387	390	498	500	531	609	640
Repair and maintenance of motor vehicles	491	467	462	421	433	350	357	521	429
Fuel (petrol, diesel)	4 806	5 614	5 086	5 107	4 830	4 912	5 550	6 256	6 484
Food products	5 455	5 911	5 830	6 108	6 177	6 078	6 524	7 149	7 349
Alcoholic beverages and other beverages	3 068	3 399	3 452	3 612	3 531	3 720	4 019	4 554	4 551
Motor vehicles, caravans, boats, etc	1 185	1 162	1 256	1 221	1 197	1 179	1 312	1 301	1 299
Recreational, cultural and sports services	2 060	2 601	2 486	2 594	2 823	2 790	2 502	2 693	2 953
Gambling and betting services	791	873	863	892	994	1 015	1 047	1 149	1 131
Education	1 352	1 705	2 005	2 037	2 389	2 362	2 623	2 911	3 431
Actual and imputed rent on holiday houses	1 730	1 838	1 967	2 038	2 091	2 338	2 500	2 689	2 976
<i>Total tourism connected products</i>	<i>21 302</i>	<i>23 959</i>	<i>23 793</i>	<i>24 421</i>	<i>24 963</i>	<i>25 246</i>	<i>26 964</i>	<i>29 831</i>	<i>31 241</i>
Other tourism goods and services	3 612	3 583	3 640	3 871	3 613	3 238	3 317	2 957	3 132
<i>Total</i>	<i>66 094</i>	<i>73 410</i>	<i>73 017</i>	<i>74 868</i>	<i>74 974</i>	<i>75 553</i>	<i>79 001</i>	<i>84 882</i>	<i>88 723</i>

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

AVERAGE TOURISM CONSUMPTION, By type of visitor

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	\$	\$	\$	\$	\$	\$	\$	\$	\$
DOMESTIC (a)									
Tourism characteristic products									
Travel agency and tour operator services	7.8	8.4	8.6	8.7	8.9	9.1	10.0	10.4	10.9
Taxi fares	1.7	2.1	2.0	1.9	2.0	2.1	2.5	2.9	2.8
Long distance passenger transportation	28.6	30.6	31.1	30.5	31.6	33.1	36.0	38.0	39.1
Motor vehicle hire and lease	2.9	3.2	3.4	3.5	3.4	4.1	4.4	5.3	4.5
Accommodation services	16.9	21.2	22.4	23.3	23.7	25.8	27.2	28.6	31.8
Takeaway and restaurant meals(b)	35.1	40.4	44.0	45.7	44.7	47.4	49.3	49.2	53.6
Shopping (including gifts and souvenirs)	34.8	40.0	41.1	44.1	45.3	47.9	47.1	45.0	47.3
<i>Total tourism characteristic products</i>	<i>127.8</i>	<i>145.8</i>	<i>152.6</i>	<i>157.8</i>	<i>159.6</i>	<i>169.6</i>	<i>176.5</i>	<i>179.5</i>	<i>190.0</i>
Tourism connected products									
Local area passenger transportation	0.7	0.7	0.8	0.8	0.8	0.9	1.0	1.3	1.4
Repair and maintenance of motor vehicles	2.0	2.0	2.0	1.9	2.0	1.6	1.6	2.3	1.9
Fuel (petrol, diesel)	19.3	23.7	22.4	22.4	21.7	22.9	25.8	27.8	29.0
Food products	18.6	20.7	21.1	22.4	22.5	23.2	25.0	25.9	26.7
Alcoholic beverages and other beverages	10.9	12.5	13.3	13.8	13.4	15.0	16.3	17.6	17.6
Motor vehicles, caravans, boats, etc	4.4	4.5	4.9	4.8	4.8	4.8	4.7	4.6	4.6
Recreational, cultural and sports services	7.4	9.8	9.8	10.2	11.1	11.8	10.5	10.8	11.9
Gambling and betting services	2.5	2.9	3.2	3.3	3.7	4.2	4.5	4.7	4.8
Education	0.6	0.6	0.6	0.7	0.8	0.9	0.9	0.9	1.0
Actual and imputed rent on holiday houses	6.2	6.9	7.7	7.9	8.1	9.5	10.1	10.5	11.7
<i>Total tourism connected products</i>	<i>72.5</i>	<i>84.2</i>	<i>85.8</i>	<i>88.2</i>	<i>88.9</i>	<i>94.8</i>	<i>100.6</i>	<i>106.5</i>	<i>110.5</i>
Other tourism goods and services	10.8	11.0	11.5	13.2	12.4	11.1	11.2	9.0	9.4
<i>Total</i>	<i>211.1</i>	<i>241.1</i>	<i>249.9</i>	<i>259.2</i>	<i>260.9</i>	<i>275.4</i>	<i>288.2</i>	<i>294.9</i>	<i>310.0</i>
INTERNATIONAL									
Tourism characteristic products									
Travel agency and tour operator services	62.8	70.8	68.3	64.8	52.4	50.0	46.3	43.0	43.5
Taxi fares	30.5	32.3	34.3	36.7	39.9	35.4	36.9	40.7	45.8
Long distance passenger transportation	1 016.1	1 148.1	1 130.2	1 120.4	1 019.1	995.4	965.4	977.5	969.9
Motor vehicle hire and lease	54.0	52.1	58.7	61.0	60.0	53.7	63.4	71.7	72.0
Accommodation services	401.0	447.8	495.9	510.5	480.2	438.1	488.9	556.4	608.8
Takeaway and restaurant meals(b)	256.9	293.6	306.7	308.9	347.5	317.4	318.2	344.2	364.8
Shopping (including gifts and souvenirs)	464.5	505.2	511.5	497.8	477.2	438.5	415.9	442.9	457.4
<i>Total tourism characteristic products</i>	<i>2 285.9</i>	<i>2 549.9</i>	<i>2 605.6</i>	<i>2 600.1</i>	<i>2 476.2</i>	<i>2 328.5</i>	<i>2 334.9</i>	<i>2 476.5</i>	<i>2 562.1</i>
Tourism connected products									
Local area passenger transportation	44.2	43.8	44.3	45.1	65.5	60.4	58.0	58.7	63.1
Repair and maintenance of motor vehicles	3.8	3.6	4.3	3.2	3.6	3.9	4.6	4.0	5.4
Fuel (petrol, diesel)	42.6	49.5	45.7	44.1	46.2	47.6	56.3	62.1	68.5
Food products	215.7	244.9	259.1	261.8	274.9	253.2	259.9	293.6	309.1
Alcoholic beverages and other beverages	98.0	113.9	119.4	127.5	135.4	122.7	126.3	142.9	151.5
Motor vehicles, caravans, boats, etc	30.8	27.3	40.9	36.5	34.7	36.8	63.8	56.4	58.6
Recreational, cultural and sports services	60.7	77.1	76.1	77.6	91.0	71.9	66.6	71.3	80.6
Gambling and betting services	40.7	43.8	36.5	34.7	40.1	29.8	24.7	26.8	22.1
Education	260.9	310.8	391.4	405.8	439.2	403.1	443.7	480.8	572.6
Actual and imputed rent on holiday houses	54.9	54.1	60.4	69.2	74.0	75.4	80.9	83.1	92.5
<i>Total tourism connected products</i>	<i>852.3</i>	<i>968.7</i>	<i>1 078.2</i>	<i>1 105.6</i>	<i>1 204.6</i>	<i>1 105.0</i>	<i>1 184.8</i>	<i>1 279.8</i>	<i>1 424.1</i>
Other tourism goods and services	220.3	215.8	237.9	213.5	193.3	183.1	190.8	187.1	204.8
<i>Total</i>	<i>3 358.5</i>	<i>3 734.5</i>	<i>3 921.7</i>	<i>3 919.2</i>	<i>3 874.1</i>	<i>3 616.6</i>	<i>3 710.5</i>	<i>3 943.4</i>	<i>4 191.0</i>

(a) Includes expenditure by outbound Australian residents before/after international trips. Includes both household and business/government visitors.

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

DOMESTIC TOURISM CONSUMPTION, By length of stay

1999-2000 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08

TOURISM CONSUMPTION - SAME DAY (\$ m)

Tourism characteristic products									
Travel agency and tour operator services	6	6	5	6	5	4	6	7	6
Taxi fares	43	52	42	42	49	36	45	61	47
Long distance passenger transportation	369	473	361	308	428	286	295	401	311
Motor vehicle hire and lease	52	52	50	45	35	45	49	51	64
Accommodation services	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	2 096	2 153	2 134	2 267	2 090	2 153	2 364	2 613	2 720
Shopping (including gifts and souvenirs)	3 546	3 779	3 593	3 781	3 662	3 753	3 811	3 967	4 200
<i>Total tourism characteristic products</i>	<i>6 112</i>	<i>6 515</i>	<i>6 184</i>	<i>6 450</i>	<i>6 268</i>	<i>6 277</i>	<i>6 570</i>	<i>7 100</i>	<i>7 349</i>
Tourism connected products									
Local area passenger transportation	63	55	59	60	50	58	55	87	101
Repair and maintenance of motor vehicles	168	121	137	134	108	156	143	149	107
Fuel (petrol, diesel)	1 984	2 033	1 797	1 853	1 759	1 859	2 192	2 533	2 648
Food products	1 343	1 187	1 065	1 177	1 035	985	1 174	1 278	1 328
Alcoholic beverages and other beverages	583	546	510	557	508	522	587	785	736
Motor vehicles, caravans, boats, etc	540	532	550	545	530	507	499	503	500
Recreational, cultural and sports services	367	503	448	419	438	454	417	514	464
Gambling and betting services	228	247	261	277	300	323	345	378	381
Education	60	60	59	63	68	74	80	86	92
Actual and imputed rent on holiday houses	—	—	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>5 336</i>	<i>5 283</i>	<i>4 886</i>	<i>5 085</i>	<i>4 796</i>	<i>4 939</i>	<i>5 493</i>	<i>6 314</i>	<i>6 356</i>
Other tourism goods and services	910	813	702	811	942	729	801	644	656
<i>Total</i>	<i>12 357</i>	<i>12 611</i>	<i>11 772</i>	<i>12 345</i>	<i>12 007</i>	<i>11 945</i>	<i>12 863</i>	<i>14 059</i>	<i>14 361</i>

AVERAGE TOURISM CONSUMPTION - SAME DAY (\$)

Tourism characteristic products									
Travel agency and tour operator services	—	—	—	—	—	—	—	0.1	—
Taxi fares	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.4	0.3
Long distance passenger transportation	2.2	3.1	2.5	2.1	3.1	2.2	2.2	2.9	2.3
Motor vehicle hire and lease	0.3	0.3	0.4	0.3	0.3	0.3	0.4	0.4	0.5
Accommodation services	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	12.5	14.1	15.0	15.8	15.2	16.4	18.0	18.8	19.7
Shopping (including gifts and souvenirs)	21.2	24.7	25.2	26.4	26.6	28.6	29.0	28.6	30.5
<i>Total tourism characteristic products</i>	<i>36.6</i>	<i>42.6</i>	<i>43.5</i>	<i>45.0</i>	<i>45.5</i>	<i>47.9</i>	<i>49.9</i>	<i>51.1</i>	<i>53.3</i>
Tourism connected products									
Local area passenger transportation	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.6	0.7
Repair and maintenance of motor vehicles	1.0	0.8	1.0	0.9	0.8	1.2	1.1	1.1	0.8
Fuel (petrol, diesel)	11.9	13.3	12.6	12.9	12.8	14.2	16.7	18.2	19.2
Food products	8.0	7.8	7.5	8.2	7.5	7.5	8.9	9.2	9.6
Alcoholic beverages and other beverages	3.5	3.6	3.6	3.9	3.7	4.0	4.5	5.7	5.3
Motor vehicles, caravans, boats, etc	3.2	3.5	3.9	3.8	3.8	3.9	3.8	3.6	3.6
Recreational, cultural and sports services	2.2	3.3	3.1	2.9	3.2	3.5	3.2	3.7	3.4
Gambling and betting services	1.4	1.6	1.8	1.9	2.2	2.5	2.6	2.7	2.8
Education	0.4	0.4	0.4	0.4	0.5	0.6	0.6	0.6	0.7
Actual and imputed rent on holiday houses	—	—	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>31.9</i>	<i>34.6</i>	<i>34.3</i>	<i>35.5</i>	<i>34.8</i>	<i>37.7</i>	<i>41.7</i>	<i>45.5</i>	<i>46.1</i>
Other tourism goods and services	5.4	5.3	4.9	5.7	6.8	5.6	6.1	4.6	4.8
<i>Total</i>	<i>74.0</i>	<i>82.6</i>	<i>82.7</i>	<i>86.2</i>	<i>87.1</i>	<i>91.1</i>	<i>97.7</i>	<i>101.3</i>	<i>104.1</i>

— nil or rounded to zero (including null cells)

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

DOMESTIC TOURISM CONSUMPTION, By length of stay *continued*

1999-2000 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08

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

Tourism characteristic products									
Travel agency and tour operator services	1 857	1 893	1 865	1 903	1 877	1 855	2 032	2 200	2 276
Taxi fares	359	416	394	376	386	390	467	564	538
Long distance passenger transportation	6 469	6 462	6 406	6 353	6 278	6 439	7 027	7 669	7 912
Motor vehicle hire and lease	645	682	686	730	685	793	854	1 084	892
Accommodation services	4 046	4 796	4 863	5 099	5 024	5 250	5 529	6 074	6 686
Takeaway and restaurant meals(b)	6 288	6 997	7 426	7 713	7 396	7 491	7 664	7 846	8 537
Shopping (including gifts and souvenirs)	4 770	5 277	5 337	5 846	5 960	5 981	5 771	5 585	5 737
<i>Total tourism characteristic products</i>	<i>24 435</i>	<i>26 524</i>	<i>26 976</i>	<i>28 020</i>	<i>27 606</i>	<i>28 198</i>	<i>29 345</i>	<i>31 023</i>	<i>32 578</i>
Tourism connected products									
Local area passenger transportation	96	113	116	120	116	116	158	191	184
Repair and maintenance of motor vehicles	305	329	304	272	307	173	189	349	291
Fuel (petrol, diesel)	2 624	3 332	3 072	3 048	2 837	2 796	3 049	3 373	3 451
Food products	3 109	3 492	3 529	3 712	3 751	3 724	3 924	4 214	4 281
Alcoholic beverages and other beverages	2 030	2 280	2 373	2 461	2 339	2 535	2 739	2 963	2 962
Motor vehicles, caravans, boats, etc	501	493	511	507	491	473	463	480	469
Recreational, cultural and sports services	1 410	1 710	1 674	1 814	1 925	1 948	1 719	1 776	2 035
Gambling and betting services	374	405	428	453	491	530	566	620	625
Education	78	81	80	85	100	108	109	112	115
Actual and imputed rent on holiday houses	1 474	1 566	1 679	1 716	1 716	1 930	2 056	2 220	2 455
<i>Total tourism connected products</i>	<i>12 002</i>	<i>13 802</i>	<i>13 766</i>	<i>14 188</i>	<i>14 075</i>	<i>14 331</i>	<i>14 974</i>	<i>16 297</i>	<i>16 868</i>
Other tourism goods and services	1 677	1 684	1 804	2 067	1 693	1 519	1 470	1 257	1 323
<i>Total</i>	<i>38 114</i>	<i>42 010</i>	<i>42 545</i>	<i>44 275</i>	<i>43 375</i>	<i>44 048</i>	<i>45 789</i>	<i>48 577</i>	<i>50 769</i>

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

Tourism characteristic products									
Travel agency and tour operator services	25.8	25.6	24.8	25.3	25.2	25.7	28.2	29.9	31.5
Taxi fares	5.0	5.6	5.2	5.0	5.2	5.4	6.5	7.7	7.4
Long distance passenger transportation	89.8	87.5	85.4	84.5	84.4	89.2	97.7	104.2	109.6
Motor vehicle hire and lease	9.0	9.2	9.1	9.7	9.2	11.0	11.9	14.7	12.4
Accommodation services	56.2	65.0	64.8	67.8	67.6	72.7	76.9	82.6	92.6
Takeaway and restaurant meals(b)	87.3	94.8	99.0	102.5	99.5	103.8	106.5	106.6	118.2
Shopping (including gifts and souvenirs)	66.2	71.5	71.1	77.7	80.1	82.9	80.2	75.9	79.4
<i>Total tourism characteristic products</i>	<i>339.3</i>	<i>359.3</i>	<i>359.4</i>	<i>372.5</i>	<i>371.3</i>	<i>390.7</i>	<i>408.0</i>	<i>421.7</i>	<i>451.1</i>
Tourism connected products									
Local area passenger transportation	1.3	1.5	1.5	1.6	1.6	1.6	2.2	2.6	2.5
Repair and maintenance of motor vehicles	4.2	4.5	4.1	3.6	4.1	2.4	2.6	4.7	4.0
Fuel (petrol, diesel)	36.4	45.1	40.9	40.5	38.2	38.7	42.4	45.8	47.8
Food products	43.2	47.3	47.0	49.3	50.5	51.6	54.5	57.3	59.3
Alcoholic beverages and other beverages	28.2	30.9	31.6	32.7	31.5	35.1	38.1	40.3	41.0
Motor vehicles, caravans, boats, etc	7.0	6.7	6.8	6.7	6.6	6.6	6.4	6.5	6.5
Recreational, cultural and sports services	19.6	23.2	22.3	24.1	25.9	27.0	23.9	24.1	28.2
Gambling and betting services	5.2	5.5	5.7	6.0	6.6	7.3	7.9	8.4	8.7
Education	1.1	1.1	1.1	1.1	1.3	1.5	1.5	1.5	1.6
Actual and imputed rent on holiday houses	20.5	21.2	22.4	22.8	23.1	26.7	28.6	30.2	34.0
<i>Total tourism connected products</i>	<i>166.6</i>	<i>187.0</i>	<i>183.4</i>	<i>188.6</i>	<i>189.3</i>	<i>198.6</i>	<i>208.2</i>	<i>221.5</i>	<i>233.6</i>
Other tourism goods and services	23.3	22.8	24.0	27.5	22.8	21.0	20.4	17.1	18.3
<i>Total</i>	<i>529.2</i>	<i>569.1</i>	<i>566.9</i>	<i>588.6</i>	<i>583.3</i>	<i>610.3</i>	<i>636.5</i>	<i>660.3</i>	<i>703.0</i>

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

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

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TOURISM CONSUMPTION, By Australian residents—outbound trips

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Domestically produced goods and services (\$m)	2 577	2 598	2 587	2 431	2 449	2 713	3 107	3 450	3 832
Overseas produced tourism goods and services									
Purchased by businesses (\$m)	3 423	3 661	3 314	3 345	3 704	3 827	3 997	4 232	4 854
Purchased by households (\$m)	10 049	12 052	11 362	11 489	13 531	15 679	16 588	17 757	19 784
Total(a) (\$m)	13 472	15 713	14 675	14 834	17 234	19 506	20 584	21 989	24 637
Total consumption by Australian residents on outbound trips (\$m)	16 049	18 311	17 262	17 264	19 684	22 219	23 691	25 439	28 470
Average consumption by Australian residents on outbound trips (\$)	4 816	5 119	5 125	5 242	5 000	4 839	4 900	4 962	4 995

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

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TOURISM CONSUMPTION, By non-residents—inbound trips

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Overseas produced goods and services (\$m)	4 405	5 111	4 923	4 722	4 581	4 786	5 107	4 960	5 426
Domestically produced tourism goods and services									
Purchased by businesses (\$m)	2 121	2 413	2 404	2 363	2 487	2 484	2 556	2 731	2 855
Purchased by households (\$m)	13 502	16 377	16 295	15 884	17 105	17 076	17 793	19 515	20 738
Total(a) (\$m)	15 623	18 789	18 700	18 247	19 592	19 560	20 349	22 246	23 593
Total consumption by non-residents on inbound trips (\$m)	20 028	23 901	23 623	22 970	24 173	24 346	25 456	27 206	29 019
Average consumption by non-residents on inbound trips (\$)	4 305	4 750	4 954	4 934	4 780	4 502	4 642	4 823	5 155

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

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PEOPLE EMPLOYED IN TOURISM(a), By industry

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Tourism characteristic and connected industries									
Travel agency and tour operator services ('000)	22.7	22.1	22.1	20.6	20.8	21.6	21.4	21.8	23.1
Road transport and motor vehicle hiring ('000)	22.7	23.5	24.5	24.1	25.5	23.8	24.3	25.5	26.6
Air and water transport ('000)	31.5	34.6	33.4	30.7	30.5	31.4	33.4	33.5	34.3
Accommodation ('000)	77.4	79.5	77.1	79.7	72.4	73.2	73.3	71.4	71.7
Cafes and restaurants ('000)	40.5	45.9	46.5	45.4	47.9	49.3	48.3	51.4	53.0
Clubs, pubs, taverns and bars ('000)	23.4	24.3	23.2	22.1	22.9	23.6	23.0	24.0	23.2
Rail transport ('000)	2.9	3.2	2.7	3.1	3.3	3.2	3.4	3.0	3.4
Manufacturing ('000)	32.9	33.3	32.3	33.3	32.0	32.5	31.8	31.8	32.8
Retail trade ('000)	105.4	105.8	110.9	115.8	115.8	119.9	120.7	120.1	125.6
Casinos and other gambling services ('000)	1.9	2.1	1.9	1.7	1.9	1.9	2.1	1.8	2.1
Libraries, museums and arts ('000)	6.4	8.0	7.7	7.9	7.8	9.2	9.6	9.8	10.9
Other entertainment services ('000)	9.6	9.3	10.0	10.8	10.9	12.2	13.0	13.6	13.1
Education ('000)	29.0	29.5	30.7	31.7	33.2	32.1	34.2	34.2	36.4
Total tourism characteristic and connected industries ('000)	406.3	421.0	423.0	427.0	425.0	433.8	438.4	441.9	456.1
All other industries ('000)	33.6	34.3	34.8	35.6	36.6	38.0	39.3	41.0	41.7
Total tourism employed persons ('000)	439.9	455.3	457.7	462.6	461.6	471.7	477.7	482.8	497.8
Total employed persons ('000)	8 835.2	9 016.4	9 143.9	9 377.7	9 528.0	9 800.1	10 042.2	10 304.9	10 578.7
Tourism industry share of total employment (%)	5.0	5.0	5.0	4.9	4.8	4.8	4.8	4.7	4.7

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

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NUMBER OF TOURISM TRIPS, By type of visitor

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Domestic(a)									
Same day	167 054	152 765	142 302	143 260	137 900	131 151	131 601	138 815	137 898
Overnight	72 017	73 819	75 047	75 216	74 356	72 178	71 934	73 571	72 219
Total domestic	239 071	226 584	217 349	218 476	212 256	203 329	203 535	212 386	210 117
International(b)									
	4 652	5 031	4 768	4 656	5 057	5 408	5 484	5 641	5 629

(a) Source: Tourism Research Australia, Travel by Australians: Quarterly Results of the National Visitor Survey, Tourism Australia, Canberra

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

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

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	773.1	828.4	787.7	793.1	926.1	1 082.0	1 090.8	1 115.1	1 121.3
Total(b)	908.6	960.9	907.5	904.7	1 047.0	1 207.9	1 221.6	1 254.8	1 265.1
North-west Europe									
France	53.5	54.2	52.0	46.3	57.3	59.0	65.6	69.9	78.0
Germany	147.2	147.5	136.8	134.0	141.0	142.4	150.4	148.7	155.2
United Kingdom	554.4	605.4	627.1	644.2	686.4	699.5	709.3	733.3	686.3
Total(b)	1 009.3	1 079.8	1 068.0	1 070.9	1 138.8	1 162.7	1 195.0	1 229.4	1 204.6
Southern & Eastern Europe									
Italy	54.4	54.6	41.1	42.5	43.7	49.5	50.8	53.3	52.8
Total(b)	118.1	132.9	101.4	98.1	106.5	117.6	122.5	134.0	141.7
Middle East & North Africa									
Total(b)	52.0	56.6	55.7	50.1	56.4	68.2	73.4	82.7	92.6
Southeast Asia									
Indonesia	83.1	98.3	94.7	86.9	91.5	82.4	81.8	85.2	93.1
Malaysia	146.8	148.4	154.3	142.4	175.3	169.0	152.5	157.1	166.0
Singapore	277.0	293.3	295.8	261.6	252.6	267.5	251.8	263.5	266.5
Thailand	68.0	77.9	80.0	75.5	78.8	79.3	74.8	77.1	84.2
Total(b)	634.4	676.7	682.7	617.7	654.1	657.1	625.7	664.0	701.1
Northeast Asia									
China (excludes SARs and Taiwan Province)	105.0	143.5	172.3	177.1	216.9	274.4	292.3	338.4	375.2
Hong Kong (SAR of China)	149.0	154.1	148.6	140.7	132.2	148.9	158.8	153.1	146.7
Japan	705.5	724.2	659.2	658.6	687.5	700.8	674.4	610.2	521.2
Korea	139.4	164.6	181.1	195.8	215.8	237.3	242.9	270.8	236.2
Taiwan (Province of China)	140.9	124.3	99.1	80.8	103.9	103.8	102.3	92.3	85.0
Total(b)	1 242.8	1 314.3	1 262.4	1 254.8	1 358.5	1 467.6	1 473.5	1 467.7	1 368.0
Southern & Central Asia									
Total	55.4	65.1	62.0	55.9	71.3	79.0	99.3	112.1	135.0
The Americas									
United States of America	436.9	502.1	424.4	423.5	430.1	445.5	452.5	455.4	454.5
Total(b)	551.1	645.0	551.1	537.1	551.9	581.1	598.8	615.7	632.9
Sub-Saharan Africa									
Total	72.4	74.5	73.3	62.8	72.4	66.9	74.0	80.6	88.1
Not stated	7.7	25.5	4.3	3.7	0.2	0.2	0.3	0.4	0.5
Total	4 651.8	5 031.3	4 768.3	4 655.8	5 057.2	5 408.3	5 484.1	5 641.2	5 629.4

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

(b) Includes other.

SHORT-TERM DEPARTURES, Australian residents—By main destination(a)

	1999-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	506.7	574.5	592.2	615.3	739.2	843.0	836.3	883.3	913.4
Total(b)	776.8	810.3	843.7	888.2	1 057.0	1 192.9	1 211.1	1 267.4	1 347.2
North-west Europe									
France	44.3	52.8	45.2	51.2	58.0	66.6	73.1	76.4	99.8
Germany	39.5	43.5	43.5	42.1	44.9	51.6	65.7	58.9	64.7
United Kingdom	330.2	323.2	308.0	308.9	351.4	384.9	409.3	415.2	429.5
Total(b)	504.6	510.8	478.5	492.1	550.9	609.9	661.5	669.7	723.6
Southern & Eastern Europe									
Italy	64.7	76.7	70.8	71.0	84.2	91.3	102.7	107.6	120.3
Total(b)	186.2	209.1	190.7	188.0	222.6	247.5	270.8	285.9	307.9
Middle East & North Africa									
Total(b)	76.6	87.4	76.6	76.2	118.5	122.9	142.5	135.4	164.2
Southeast Asia									
Indonesia	256.8	294.8	270.9	194.4	271.1	344.0	241.9	231.4	328.1
Malaysia	126.3	134.8	109.5	97.8	126.0	155.5	163.9	172.5	185.6
Singapore	145.9	153.6	163.2	119.1	148.4	175.9	204.7	208.3	224.4
Thailand	147.8	157.7	163.4	150.5	153.8	187.0	246.4	331.7	403.0
Total(b)	801.0	897.7	860.9	721.9	894.4	1 093.0	1 096.2	1 217.7	1 446.0
Northeast Asia									
China (excludes SARs and Taiwan Province)	86.3	100.6	121.3	117.9	150.2	214.2	239.9	268.5	286.7
Hong Kong (SAR of China)	149.7	156.8	142.0	114.8	140.1	173.3	190.7	200.0	215.1
Japan	64.6	67.7	71.6	72.5	79.6	96.3	100.3	114.8	142.3
Korea	19.8	23.0	23.9	24.7	27.0	28.5	30.7	30.8	35.9
Taiwan (Province of China)	34.9	35.8	35.4	33.2	39.4	39.4	37.2	38.5	38.6
Total(b)	357.0	386.4	396.1	364.8	438.9	554.6	602.5	656.6	726.2
Southern & Central Asia									
Total	78.5	85.4	76.5	84.4	110.4	134.2	155.2	168.6	191.0
The Americas									
United States of America	373.7	372.6	276.0	287.4	342.1	394.5	437.8	450.7	491.9
Total(b)	467.7	487.1	370.8	397.9	456.7	531.8	581.2	603.3	658.3
Sub-Saharan Africa									
Total	57.8	53.7	57.2	63.5	71.3	79.1	86.4	97.8	106.5
Not stated	26.1	49.5	16.9	16.3	16.1	25.3	27.6	24.7	28.6
Total	3 332.3	3 577.3	3 367.9	3 293.3	3 936.8	4 591.2	4 834.9	5 127.1	5 699.5

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

(b) Includes other.

EXPLANATORY NOTES

INTRODUCTION

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

2 Implicitly, tourism is included in the core national accounts. The products purchased by visitors, and produced by suppliers, are all part of the economic activity measured in the national accounts. However, while all the products that are produced and consumed in meeting tourism demand are embedded in the core accounts, they are not readily apparent because 'tourism' is not identified as an industry or product in international statistical standards. In the *Australian and New Zealand Standard Industrial Classification* (ANZSIC), 1993 edition, underlying the Australian national accounts, industries are defined on the basis of the goods and services which they mainly produce. On the other hand, the tourism industry is defined according to the status of the consumer. That is, it is the characteristics of the consumer that determine whether the production is included within the scope of tourism.

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

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

INTERNATIONAL STANDARDS

5 The concepts and methods used in the Australian TSA are based on international standards developed by an Inter-Secretariat Working Group on Tourism Statistics comprised of the Organisation for Economic Co-operation and Development (OECD), the statistical arm of the Commission of the European Communities (Eurostat), the United Nations (UN), and the World Tourism Organisation (WTO). The international standards were released electronically in March 2000 in *Tourism Satellite Account: Methodological References*, and were published in 2001 in *Tourism Satellite Account: Recommended Methodological Framework*. National statistical offices such as the ABS were consulted during the development of the international standards. The standards are based on the *System of National Accounts 1993* (SNA93), which is the prevailing international standard for national accounts statistics.

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

EXPLANATORY NOTES *continued*

DIRECT AND INDIRECT ECONOMIC IMPACTS

7 The estimates of tourism gross value added, tourism GDP and tourism employment in this publication relate to the direct impact of tourism only. A direct impact occurs where there is a direct relationship (physical and economic) between the visitor and producer of a good or service.

8 Indirect tourism demand is a broader notion that includes the downstream effects of tourism demand. For example, when a visitor buys a meal, indirect tourism demand is generated for the food manufacturer, the transporter, the electricity company, etc., that provide the necessary inputs required to make the meal. To fully measure the indirect effects, account should also be taken of changes in incomes which may feed through to further changes in tourism demand. A full analysis of indirect effects is best done using economic modelling. Tourism Research Australia have undertaken this work and their latest results are reported in the *Tourism Research Report: Indirect Economic Contribution of Tourism to Australia, 1998-1999 to 2003-2004*.

CONCEPTS OF TOURISM *Tourism*

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

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

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

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

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

Visitors

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

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

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

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

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

- persons for whom travel is an intrinsic part of their job, e.g., bus driver, air crew

EXPLANATORY NOTES *continued*

Visitors continued

- persons who travel for the purpose of being admitted to or detained in a residential facility such as a hospital, prison or long stay care
- persons who are travelling as part of a move to a new permanent residence
- persons who are undertaking military duties
- persons who are travelling between two parts of their usual environment.

Usual environment

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

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

Tourism consumption

19 Tourism consumption is defined as

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

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

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

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

Tourism gross value added and tourism GDP

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

24 Tourism gross value added shows only the 'value' which a producer adds to the raw material goods and services it purchases in the process of producing its own output. Tourism gross value added is measured as the value of the output of tourism products by industries less the value of the inputs used in producing these tourism products. Output is measured at 'basic prices', that is before any taxes on tourism products are added (or any subsidies on tourism products are deducted). Taxes on tourism products include the Goods and services tax (GST), wholesale sales taxes and excise duties on goods supplied

EXPLANATORY NOTES *continued*

Tourism gross value added and tourism GDP continued

to visitors. Tourism gross value added is directly comparable with estimates of the gross value added of 'conventional' industries such as mining and manufacturing that are presented in the national accounts.

25 SNA93 states that basic price measures are to be used for comparisons between industries and across countries because it is free of the effects of taxes and subsidies on products which can vary between industries (and countries) and over time. The tax and subsidy component of a product's sale price does not represent value added by the industry producing that product.

26 Tourism GDP, on the other hand, measures the value added of the tourism industry at purchasers' (market) prices. It therefore includes taxes paid less subsidies received on tourism related products as these are reflected in prices that visitors actually pay. Tourism GDP will generally have a higher value than tourism value added. Tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While tourism GDP is useful in this context, the tourism gross value added measure should be used when making comparisons with other industries or between countries.

Gross fixed capital formation

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

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

Classifications

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

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

31 Tourism characteristic industries are defined as those industries that would either cease to exist in their present form, or would be significantly affected if tourism were to cease. In the Australian TSA, for an industry to be 'characteristic', at least 25 per cent of its output must be consumed by visitors. Whether or not an industry is classified as characteristic has no effect on total value added resulting from tourism, as the TSA measures the gross value added resulting from the production of products directly consumed by visitors, not the total gross value added generated by tourism related industries.

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

EXPLANATORY NOTES *continued*

Classifications continued

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

TOURISM SATELLITE ACCOUNT FRAMEWORK

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

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

36 The supply and use tables are brought to balance so that the supply of each product equals its use. The supply and use tables on which the TSA is based contain 53 industries and 225 products. To derive the TSA, it was necessary to augment the standard supply and use tables. As the objective of the TSA is to focus on tourism related products and the industries that produce them, some disaggregation of the products and industries shown in the standard tables was required. For operational convenience in constructing the TSA, the non-tourism products and industries were compressed, but the details still remain in the underlying supply and use tables.

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

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

39 More details on the supply and use approach to constructing a TSA can be found in Organisation for Economic Co-operation and Development, *Measuring the Role of Tourism in OECD Economies*, OECD, Paris, 2000. Readers who require more detailed information on supply and use tables more generally should consult SNA93.

CALCULATING BENCHMARK TOURISM GROSS VALUE ADDED AND TOURISM GDP

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

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

- identify which products in the economy are purchased by visitors
- derive an estimate of tourism consumption for each tourism product

EXPLANATORY NOTES *continued*

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

- remove product taxes and subsidies, margins and imports from tourism consumption of each product at purchasers' prices to derive tourism consumption at basic prices—this represents the domestic output of tourism
- determine what proportion of the domestic output of each product is consumed by visitors by dividing tourism consumption at basic prices into the total supply of each product at basic prices—this is the tourism product ratio
- identify the industries which supply each of the tourism products to visitors
- apply the tourism product ratio to the output of each product by each industry to derive the tourism output of each industry
- estimate the intermediate consumption required to produce each industry's output of tourism products using relationships in the supply and use tables. The default assumption is that there is a constant ratio of output to intermediate consumption for both tourism and non-tourism products produced by an industry
- calculate tourism gross value added at basic prices for each industry as tourism output less the intermediate consumption required to produce the tourism output, and sum for all industries in the economy. Tourism gross value added at basic prices is directly comparable to the value added for all other industries
- tourism GDP is derived by adding net taxes on tourism products (calculated using visitor expenditures as a proportion of total expenditures) to tourism gross value added at basic prices. Tourism GDP is directly comparable to GDP.

UPDATE METHODOLOGY

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

- derive an estimate of tourism consumption for each tourism product
- remove product taxes and subsidies, margins and imports from tourism consumption of each product at purchasers' prices to derive tourism consumption at basic prices—this represents the domestic output of tourism
- allocate the output of each tourism product to producing industry using ratios from the benchmark TSA
- sum the products produced by each tourism industry to derive the output for each tourism industry
- split industry output between value added and intermediate consumption using each industry's input-output ratios taken from the benchmark TSA.
- 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.

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

DATA SOURCES

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

Tourism consumption data

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

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

EXPLANATORY NOTES *continued*

*Tourism consumption data
continued*

47 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.

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

49 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 is calculated by multiplying average annual rents by the total number of holiday houses in Australia from the Census of Population and Housing.

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

51 For the 1997–98 TSA the imputation for non-market services provided by government utilised data on visitor numbers from *Cultural Trends in Australia* (cat.no.4172.0), whilst the imputation for foreign exchange margins was derived using international visitors' expenditure data, and data for currency buy/sell rates. Estimates for later years are extrapolated using movements in government final consumption expenditure on relevant products for the government imputation, and movements in the number of short term arrivals for the foreign exchange imputation.

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

*Relationship with balance of
payments tourism related
services*

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

54 In this publication information on Tourism Consumption, by Australian Residents : Outbound Trips is presented. This table records the value of goods and services sourced from non-residents purchased by Australian residents in association with these trips. The difference in the estimates in this publication and the service debits memorandum item published in the balance of payments relate to: any transactions between residents and non-residents which do not relate to the value of tourism goods and services purchased within the Australian economic territory; expenditure by student travellers on long term

EXPLANATORY NOTES *continued*

Relationship with balance of payments tourism related services continued

visas (as they do not meet the definition of a visitor); and payments to non-resident travel agencies for services provided outside Australian territory.

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

Industry data

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

57 The ABS annual business surveys collect data for business income and expense items for all broad industry groups in the economy. These surveys were expanded in 1997–98, 2000–01 and 2003–04 to provide extra data for tourism characteristic industries. The ABS Economic Activity Survey (EASTAX), supplemented with taxation data, is the major source of data for the transport, automotive fuel, and motor vehicle hire industries. The ABS Service Industry Surveys are a major source of data for travel agents, libraries, museums and the arts, accommodation, cafes and restaurants, pubs and taverns, clubs, gambling industries and casinos.

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

Employment

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

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

EXPLANATORY NOTES *continued*

Employment continued

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

Other visitor characteristics

DOMESTIC VISITORS

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

INTERNATIONAL ARRIVALS AND DEPARTURES

63 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

64 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.

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

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

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

EXPLANATORY NOTES *continued*

QUALITY OF ESTIMATES

continued

68 In the extrapolated years the allocation of tourism gross output to producing industry and the derivation of tourism gross value added are based on relationships that applied in the benchmark years of 1997–98, 2000–01 and 2003–04. In compiling the 2003–04 benchmark the coefficients for the previous benchmark years, as well as the update years, were reviewed and adjusted as appropriate. The review of these coefficients for all years was required to reflect the significant revisions that were implemented in the supply use tables underlying the 2004-05 release of the ASNA. For further information on these revisions see the feature article '*Updated National Accounts Benchmarks*' released in conjunction with the 2004–05 edition of *Australian System of National Accounts* (cat. no. 5204.0). The article is available on the ABS web site. The underlying assumption of this approach is that structural change occurs only slowly. The extrapolation techniques used in the TSA updates may not fully capture structural changes in the tourism industry and the Australian economy. To overcome this deficiency the benchmark coefficients can be altered in the TSA updates where there is strong evidence of structural change in tourism related industries. As the benchmark relationships are likely to become less relevant over time, extrapolated estimates only remain tenable where there is a realignment to periodic benchmarks.

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

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

ABBREVIATIONS

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

APPENDIX 1 TOURISM PRODUCT CONCORDANCE

TOURISM RELATED PRODUCTS

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

TOURISM RELATED PRODUCTS

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

. . not applicable

APPENDIX 1 TOURISM PRODUCT CONCORDANCE *continued*

TOURISM RELATED PRODUCTS *continued*

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

APPENDIX 2 TOURISM INDUSTRY CONCORDANCE

TOURISM RELATED INDUSTRIES

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

TOURISM RELATED INDUSTRIES

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

APPENDIX 2 TOURISM INDUSTRY CONCORDANCE *continued*

TOURISM RELATED INDUSTRIES *continued*

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

TOURISM RELATED INDUSTRIES FOR EMPLOYMENT ESTIMATES

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

TOURISM EMPLOYMENT INDUSTRIES

<i>Tourism Employment Industries</i>	<i>Tourism related industries</i>
Travel agency and tour operator services	Travel agency and tour operator services
Road transport and motor vehicle hiring	Taxi transport; other road transport; motor vehicle hiring
Rail transport	Rail transport
Air and water transport	Air and water transport
Accommodation	Accommodation
Cafes and restaurants	Cafes and restaurants
Manufacturing	Food manufacturing; beverage manufacturing; transport equipment manufacturing; other manufacturing
Retail trade	Other retail trade; automotive fuel retailing; takeaway food outlets
Clubs, pubs, taverns and bars	Clubs, pubs, taverns and bars
Casinos and other gambling services	Casinos and other gambling services
Libraries, museums and arts	Libraries, museums and arts
Other entertainment services	Other entertainment services
Education	Education
All other industries	All other industries

GLOSSARY

Basic price	The amount receivable by the producer from the purchaser for a unit of a good or service produced as output minus any tax payable, and plus any subsidy receivable, on that unit as a consequence of its production or sale. It excludes any transport charges invoiced separately by the producer. See also <i>Purchasers' prices</i> .
Compensation of employees	The total remuneration, in cash or in kind, payable by an enterprise to an employee in return for work done by the employee during the accounting period. It is further classified into two sub-components: wages and salaries; and employers' social contributions. Compensation of employees is not payable in respect of unpaid work undertaken voluntarily, including the work done by members of a household within an unincorporated enterprise owned by the same household. Compensation of employees excludes any taxes payable by the employer on the wage and salary bill (e.g. payroll tax, fringe benefits tax). See also <i>Employers' social contributions</i> ; <i>Wages and salaries</i> .
Consumption by international visitors	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by non-residents on tourism related products, including those sold at prices that are not economically significant. See also <i>Tourism consumption</i> ; <i>Tourism business and government consumption</i> ; <i>Tourism household consumption</i> .
Current prices	Estimates are valued at the prices of the period to which the observation relates. For example, estimates for 2002–03 are valued using 2002–03 prices. This contrasts to chain volume measures where the prices used in valuation refer to the prices of the previous year.
Direct tourism demand	A direct economic impact is generated where a direct physical or economic relationship between the visitor and producer of the good or service exists. See also Indirect tourism demand.
Economically significant prices	Prices which have a significant influence on both the amounts the producers are willing to supply and the amounts purchasers wish to buy. See also <i>Basic price</i> ; <i>Purchasers' prices</i> .
Employed person	Is a person aged 15 years and over who, during the reference week: <ul style="list-style-type: none">■ worked for one hour or more for pay, profit, commission or payment in kind in a job or business, or on a farm (comprising employees, employers and own account workers)■ worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers)■ were employees who had a job but were not at work and were: on paid leave; on leave without pay for less than four weeks up to the end of the reference week; stood down without pay because of bad weather or plant breakdown at their place of employment for less than four weeks up to the end of the reference week; on strike or locked out; on workers' compensation and expected to be returning to their job; or receiving wages or salary while undertaking full-time study■ were employers, own account workers or contributing family workers who had a job, business or farm, but were not at work.
Employers' social contributions	Payments by employers which are intended to secure for their employees the entitlement to social benefits should certain events occur, or certain circumstances exist, that may adversely affect their employees' income or welfare – namely work-related accidents and retirement.
Exports of goods and services	The value of goods exported and amounts receivable from non-residents for the provision of services by residents.
Final consumption expenditure – general government	Net expenditure on goods and services by public authorities, other than those classified as public corporations, which does not result in the creation of fixed assets or inventories or in the acquisition of land and existing buildings or second-hand assets. It comprises expenditure on compensation of employees (other than those charged to capital works, etc.), goods and services (other than fixed assets and inventories) and

GLOSSARY *continued*

Final consumption expenditure – general government <i>continued</i>	consumption of fixed capital. Expenditure on repair and maintenance of roads is included. Fees, etc., charged by general government bodies for goods sold and services rendered are offset against purchases. Net expenditure overseas by general government bodies and purchases from public corporations are included. Expenditure on defence assets that are used in a fashion similar to civilian assets is classified as gross fixed capital formation; expenditure on weapons of destruction and weapon delivery systems is classified as final consumption expenditure.
Final consumption expenditure – households	Net expenditure on goods and services by persons and expenditure of a current nature by private non-profit institutions serving households. This item excludes expenditures by unincorporated businesses and expenditures on assets by non-profit institutions (included in gross fixed capital formation). Also excluded is expenditure on maintenance of dwellings (treated as intermediate expenses of private enterprises), but personal expenditure on motor vehicles and other durable goods and the imputed rent of owner-occupied dwellings are included. The value of 'backyard' production (including food produced and consumed on farms) is included in household final consumption expenditure and the payment of wages and salaries in kind (e.g. food and lodging supplied free to employees) is counted in both household income and household final consumption expenditure.
Gross domestic product (GDP)	Is the total market value of goods and services produced in Australia within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. Thus gross domestic product, as here defined, is 'at market prices'. It is equivalent to gross national expenditure plus exports of goods and services less imports of goods and services. Gross farm product is that part of gross domestic product which arises from production in agriculture and services to agriculture. Gross non-farm product arises from production in all other industries.
Gross fixed capital formation	Expenditure on fixed assets – dwellings, other buildings and structures, machinery and equipment, livestock, intangible fixed assets and ownership transfer costs. The machinery and equipment category includes plant, machinery, equipment, vehicles, etc. Expenditure on repair and maintenance of fixed assets is excluded, being chargeable to the production account. Additions to fixed assets are regarded as capital formation. Also included is compensation of employees and other costs paid by private enterprise in connection with own-account capital formation. Expenditure on dwellings, other buildings and structures, and machinery and equipment is measured as expenditure on new and second-hand assets, less sales of existing assets. Ownership transfer costs comprise stamp duty, real estate agents' fees and sales commissions, conveyancing fees and miscellaneous government charges.
Gross mixed income of unincorporated enterprise	The surplus or deficit accruing from production by unincorporated enterprises. It includes elements of both compensation of employees (returns on labour inputs) and operating surplus (returns on capital inputs).
Gross operating surplus	The operating surplus accruing to all enterprises, except unincorporated enterprises, from their operations in Australia. It is the excess of gross output over the sum of intermediate consumption, compensation of employees, and taxes less subsidies on production and imports. It is calculated before deduction of consumption of fixed capital, dividends, interest, royalties and land rent, and direct taxes payable, but after deducting the inventory valuation adjustment. Gross operating surplus is also calculated for general government and it equals general government's consumption of fixed capital.
Gross value added	The value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries. See also <i>Intermediate consumption; Output</i> .

GLOSSARY *continued*

Imports of goods and services	The value of goods imported and amounts payable to non-residents for the provision of services to residents.
Indirect tourism demand	Includes downstream effects of tourism expenditure. For example, when a visitor buys a meal, indirect tourism demand is generated for the food manufacturer, the transporter, the electricity company etc., that provide the necessary inputs required to make the meal. To fully measure indirect effects, account should also be taken of the effect of changes in incomes which feed through to further changes in tourism demand. See also <i>Direct tourism demand</i> .
Input-output table	An input-output table is a means of presenting a detailed analysis of the process of production and the use of goods and services (products) and the income generated in the production process; they can be either in the form of (a) supply and use tables or (b) symmetric input-output tables.
Intermediate consumption	Consists of the value of the goods and services consumed as inputs by a process of production, excluding the consumption of fixed capital. See also <i>Gross value added</i> .
Margin	This is the difference between the resale price of a good and the cost to the retailer or wholesaler of the good sold. A transport margin consists of the transport charges paid separately by the purchaser in taking delivery of the good.
Other taxes on production	Consists of all taxes that enterprises incur as a result of engaging in production, except taxes on products. Other taxes on production include: taxes related to the payroll or workforce numbers excluding compulsory social security contributions paid by employers and any taxes paid by the employees themselves out of their wages or salaries; recurrent taxes on land, buildings or other structures; some business and professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions. See also <i>Taxes less subsidies on production and imports</i> and <i>Taxes less subsidies on products</i> .
Output	This consists of those goods and services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use. See also <i>Gross value added</i> .
Purchasers' price	The purchaser's price is the amount paid by the purchaser, excluding any deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser. The purchaser's price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place. See also <i>Basic prices; Economically significant prices</i> .
Taxes less subsidies on production and imports	Defined as 'taxes on products' plus 'other taxes on production' less 'subsidies on products' less 'other subsidies on production'. The taxes do not include any taxes on the profits or other income received by an enterprise. They are payable irrespective of the profitability of the production process. They may be payable on the land, fixed assets or labour employed in the production process, or on certain activities or transactions. See also <i>Other taxes on production</i> and <i>Taxes on products</i> .
Taxes less subsidies on products	A tax or subsidy on a product is payable per unit of a good or service. The tax or subsidy may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax or subsidy on a product usually becomes payable when the product is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation. See also <i>Other taxes on production</i> and <i>Taxes on production and imports</i> .

GLOSSARY *continued*

Tourism	Comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.
Tourism business and government consumption	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by resident businesses or governments, on tourism related products.
Tourism characteristic industries	Are those industries that would either cease to exist in their present form, producing their present product(s), or would be significantly affected if tourism were to cease. In the Australian Tourism Satellite Account, for an industry to be 'characteristic', at least 25 per cent of its output must be consumed by visitors.
Tourism characteristic products	These are defined in the international TSA standards as those products which represent an important part of tourism consumption, or for which a significant proportion of the sales are to visitors. In the Australian TSA, for a product to be 'characteristic' it must account for at least 10 per cent of total tourism consumption and/or at least 25 per cent of the total output of the product must be consumed by visitors.
Tourism connected industries	Are those, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of tourism gross value added and tourism GDP.
Tourism connected products	Are those that are consumed by visitors but are not considered as tourism characteristic products. All other products in the supply and use table not consumed by visitors are classified as 'all other goods and services' in the TSA.
Tourism consumption	Is the total consumption made by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination. See <i>Tourism business and government consumption</i> , <i>Tourism household consumption</i> , and <i>Consumption by international visitors</i> .
Tourism GDP	Is tourism gross value added plus taxes paid less subsidies received on tourism related products as these are reflected in prices that visitors actually pay. Tourism GDP will generally have a higher value than tourism value added. Tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While it is useful in this context, the tourism gross value added measure should be used when making comparisons with other industries or between countries. See <i>Tourism gross value added</i> .
Tourism gross value added	Measures the value of tourism gross output at basic prices by all industries which supply tourism products, less the value of the inputs used in producing these tourism products. This measure is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and should also be used for comparisons across countries. See <i>Tourism GDP</i> .
Tourism household consumption	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by resident households on tourism related products, including those sold at prices that are not economically significant. See <i>Tourism consumption</i> .
Tourism industry ratio	This is the proportion of the total value added of an industry which is related to tourism.
Tourism product ratio	This is the proportion of the total supply of a product which is consumed by visitors.
Tourism trip	This is defined in the international TSA standards as those trips which are taken by visitors.
Usual environment	This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study and other places frequently visited. The usual environment criteria has two dimensions. Frequency means places that are visited on a routine basis (at least once a week) are considered part of a

GLOSSARY *continued*

- Usual environment *continued*** 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 twelve months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited'.
- Wages and salaries** Consist of amounts payable in cash including the value of any social contributions, income taxes, etc., payable by the employee even if they are actually withheld by the employer for administrative convenience or other reasons and paid directly to social insurance schemes, tax authorities, etc., on behalf of the employee. Wages and salaries may be paid as remuneration in kind instead of, or in addition to, remuneration in cash. Separation, termination and redundancy payments are also included in wages and salaries. Wages and salaries are also measured as far as possible on an accrual rather than a strict cash basis. See also *Employers' social contributions; Compensation of employees*.

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