

**TOURISM SATELLITE ACCOUNT** AUSTRALIAN  
NATIONAL  
ACCOUNTS

EMBARGO: 11.30AM (CANBERRA TIME) TUES 12 APR 2005

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## NOTES

- ABOUT THIS PUBLICATION** This publication presents the key results of the Tourism Satellite Account (TSA) for the years 1997–98 to 2003–04. Work on the TSA has been funded by the Department of Industry, Tourism and Resources (DITR).
- REVISIONS IN THIS ISSUE** Revisions have been made to earlier year estimates. Some minor revisions to 2002–03 have been made for taxes and margins. These have impacted on estimates of tourism output, tourism value added and tourism GDP. Revisions to estimates of consumption of education by international visitors have been made as a result of updated data from the Department of Education, Science and Training (DEST), impacting on estimates for 2001–02 and 2002–03.
- In addition the economy wide national accounting aggregates for 1997–98 to 2002–03 have been revised to make them consistent with the 2003–04 issue of *Australian System of National Accounts* (cat. no. 5204.0). These revisions impact on ratios of tourism to overall economic activity.
- CHANGES IN THIS ISSUE** The 2002–03 release of this publication contained estimates for a new benchmark TSA which allowed for the release of more detailed information in respect of 1997–98 and 2000–01. The 2003–04 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.
- DATA VALUES AND ROUNDING** All values, unless otherwise indicated, are shown in Australian dollars rounded to the nearest million. Where figures have been rounded, discrepancies may occur between the sums of the component items and totals.
- NEXT ISSUE** The 2004–05 issue of this publication is expected to be released in April 2006.
- .....
- ABBREVIATIONS**
- ABS Australian Bureau of Statistics
  - ANZSIC Australian and New Zealand Standard Industrial Classification
  - ANZSPC Australian and New Zealand Standard Product Classification
  - DITR Australian Government Department of Industry, Tourism and Resources
  - Eurostat Statistical Office of the European Communities
  - GDP gross domestic product
  - GST Goods and Services Tax
  - IVS International Visitor Survey
  - LFS Labour Force Survey
  - NVS National Visitor Survey
  - OECD Organisation for Economic Co-operation and Development
  - SNA93 System of National Accounts 1993
  - TRA Tourism Research Australia
  - TSA Tourism Satellite Account

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## ANALYSIS OF RESULTS

### KEY RESULTS

Tourism gross domestic product (GDP) represents the total market value of Australian produced goods and services consumed by visitors after deducting the cost of goods and services used up in the process of production. Tourism accounted for nearly \$32 billion of total GDP in 2003–04, a decline in current prices of 0.1% from 2002–03. In contrast total GDP grew by 7.3% in current prices.

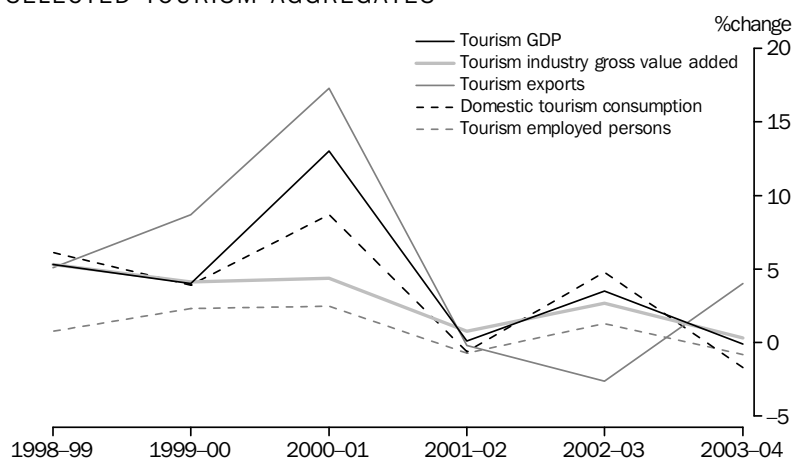
The TSA does not present volume estimates so the growth rates in current prices referred to here also reflect the effects of price change. One way around this is to compare the tourism industry's share of GDP over time. In 2003–04 the tourism industry share of GDP was 3.9%, which is the lowest share of GDP since the TSA was first compiled in 1997–98. This is the third consecutive decline since the share peaked in 2000–01.

The high tourism share of GDP in 2000–01 was largely due to price increases in tourism services resulting from the introduction of the Goods and Services Tax (GST) and the impact of the Olympic Games. During 2001–02 and 2002–03 external events such as terrorism and the Severe Acute Respiratory Syndrome (SARS) scare caused a decline in both international visitors to Australia and the willingness of Australians to travel overseas.

In 2003–04 the key factor behind the fall in the tourism share of GDP was that Australians travelled less in Australia and more overseas. This is shown by the 1.7% decline in domestic tourism consumption, whereas total outbound expenditure by Australians travelling overseas rose by 10.6%.

The fall in the share of GDP occurred even though there was a surge in consumption by international visitors of 4% which was driven in part by the conduct of the Rugby World Cup in late 2003.

### SELECTED TOURISM AGGREGATES



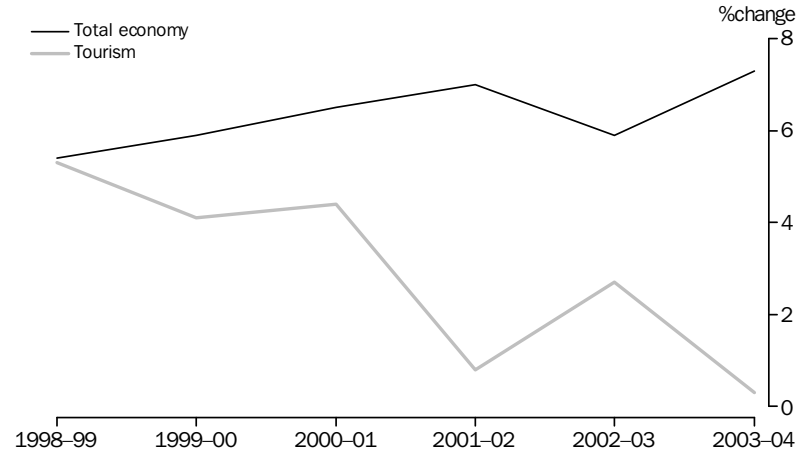
Industry gross value added measures the value of production exclusive of product taxes such as the GST. It is the preferred national accounts measure of the production of industries because it is free from distortions in prices caused by changes in tax rates or the introduction of new taxes. The tourism industry share of total industry gross value added in 2003–04 was 3.5%. This represents the lowest point in the series, having declined from its peak of 4.3% in 1997–98. The tourism industry share for 2003–04

## ANALYSIS OF RESULTS *continued*

### KEY RESULTS *continued*

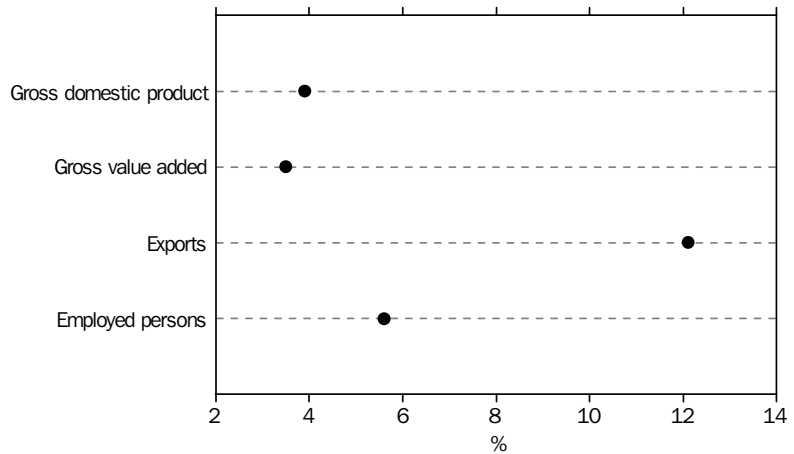
declined because tourism gross value added grew at a slower rate of 0.3% than the very strong growth in gross value added for the whole economy of 7.3%.

#### GROWTH IN INDUSTRY GROSS VALUE ADDED, Current prices



Tourism continues to contribute significantly to employment and Australia's exports. The tourism industry share of total employment declined slightly in 2003-04 to 5.6% compared to its share of 5.9% between 1997-98 and 2000-01. The decrease in the tourism share of employment is because of a decline in tourism employment of 1% compared with a growth in total employment of 1%.

#### TOURISM SHARE OF THE AUSTRALIAN ECONOMY—2003-04



Tourism contributed 12.1% of total exports of goods and services in 2003-04, a proportion higher than for 2002-03 when tourism accounted for 11.2% of exports.

Domestic visitors generated 76% of tourism industry GDP in 2003-04 while international visitors generated 24%. The growth in international tourism consumption has meant that the international contribution to tourism GDP has increased in 2003-04 by 1.2 percentage points at the expense of the domestic visitor share.

## ANALYSIS OF RESULTS *continued*

### TOURISM INDUSTRY GROSS VALUE ADDED

In 2003–04, the industries that accounted for the largest share of tourism gross value added were Air and water transport (14%), Accommodation (11%), Cafes, restaurants and takeaway food outlets (10%), and Other retail trade (9%). These shares have been reasonably steady since 1997-98.

### TOURISM GROSS VALUE ADDED, By selected industries

	1997–98		2000–01		2003–04	
	<i>Tourism gross value added</i>	<i>Share of total value added</i>	<i>Tourism gross value added</i>	<i>Share of total value added</i>	<i>Tourism gross value added</i>	<i>Share of total value added</i>
	\$m	% pts	\$m	% pts	\$m	% pts
Air & water transport	3 211	14.7	3 727	14.9	3 521	13.5
Accommodation	2 400	11.0	2 775	11.1	2 941	11.3
Cafes, restaurants & takeaway food outlets	2 209	10.1	2 501	10.0	2 599	10.0
Other retail trade	2 079	9.5	2 124	8.5	2 295	8.8
All other industries	11 994	54.8	13 917	55.6	14 660	56.3
<b>Total</b>	<b>21 894</b>	<b>100.0</b>	<b>25 044</b>	<b>100.0</b>	<b>26 016</b>	<b>100.0</b>

### COMPARISON WITH 'NON-TOURISM' INDUSTRIES

Tourism contributed \$26 billion to industry gross value added in 2003–04. When compared to the traditional industries published in ABS statistics using Australian and New Zealand Standard Industrial Classification (ANZSIC) divisions, the gross value added of the tourism industry ranks thirteenth out of the seventeen industry divisions. Tourism gross value added exceeded that of Agriculture, forestry and fishing, Communication services, Electricity, gas and water supply, Personal and other services, Accommodation, cafes and restaurants, and Cultural and recreational services.

### TOURISM CONSUMPTION

Total tourism consumption declined by 0.4% in 2003–04 after a rise of 3% in 2002–03. This occurred because domestic travel consumption declined, despite an increase in consumption by international visitors. Tourism consumption by domestic households fell from \$48.2 billion to \$47.4 billion in 2003–04, a decline of 1.8%. Similarly, consumption by business and government went from \$8.4 billion to \$8.3 billion in 2003–04, a decrease of 1%. International visitor consumption rose by 4% to \$17.3 billion in 2003–04.

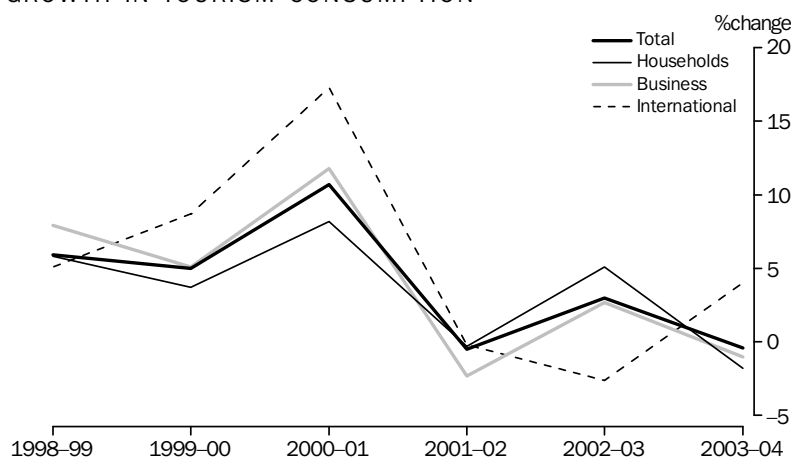
Tourism consumption recorded its strongest growth during 2000–01 of 10.7%, which mainly reflects the impact of GST on the price of services and expenditure on Olympic tickets. (See following graph.)

## ANALYSIS OF RESULTS *continued*

### TOURISM CONSUMPTION

*continued*

### GROWTH IN TOURISM CONSUMPTION



Tourism consumption of most products declined during 2003-04. The largest decreases occurred for Fuel (down 5%), Long distance passenger transport, Takeaway and restaurant meals and Alcoholic and other beverages (all down 3%). All of these products are significant contributors to total tourism consumption.

The products for which tourism consumption increased between 2002-03 and 2003-04 were Education (up 13%), Gambling and betting services (up 12%), and Recreational, cultural and sports services (up 8%). Consumption of these three products increased for both domestic and international visitors.

Domestic visitors contributed 76% of total tourism consumption in 2003-04 while the international visitor contribution was 24%. Of all domestic visitors, domestic households accounted for 85% and domestic business/government accounted for 15%.

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

In 2003-04 the greatest tourism consumption by product occurred for Long distance passenger transportation and Shopping, including gifts and souvenirs (16% each), followed by Takeaway and restaurant meals (15%) and then Accommodation services (10%).

However, there are some marked differences in consumption patterns by type of visitor. Long distance passenger transportation is the dominant tourism product consumed by domestic business and government (41%) and international visitors (26%). In contrast, domestic household visitor consumption is dominated by Shopping, including gifts and souvenirs (20%), and Takeaway and restaurant meals (19%).

## ANALYSIS OF RESULTS *continued*

### TOURISM CONSUMPTION *continued*

SHARE OF TOURISM CONSUMPTION, Selected tourism products—By type of visitor—2003-04

	<i>Households</i>	<i>Business/ government</i>	<i>International</i>	<i>All visitors</i>
	%	%	%	%
Long distance passenger transportation	8.6	40.8	26.2	16.5
Shopping (including gifts & souvenirs)	19.8	0.3	13.2	16.0
Takeaway & restaurant meals	19.0	6.2	7.5	14.8
Accommodation services	6.7	20.6	13.6	9.9
Food products	9.6	0.6	7.0	8.0
Fuel (petrol, diesel)	7.0	15.7	1.2	6.6
Taxi products	0.4	3.1	0.7	0.8
All other tourism products	28.9	12.6	30.5	27.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

### INTERNATIONAL TRADE IN TOURISM

Tourism makes an important contribution to Australia's export earnings. In 2003–04, international visitors consumed \$17.3 billion worth of goods and services produced by the Australian economy. This represented 12.1% of the total exports of goods and services. While tourism exports grew quite strongly between 1997–98 and 2000–01, so did exports of other goods and services. However, in 2003–04 tourism exports increased by 4%, while total exports declined by 3% thus leading to an increase in the tourism share.

### EXPORTS OF TOURISM GOODS AND SERVICES

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
International visitor consumption (\$m)	12 792	13 445	14 610	17 140	17 107	16 656	17 317
Total exports (\$m)	113 744	112 025	126 222	153 763	153 200	148 293	143 366
Tourism share of exports (%)	11.2	12.0	11.6	11.1	11.2	11.2	12.1
Growth in international visitor consumption (%)	..	5.1	8.7	17.3	-0.2	-2.6	4.0
Growth in total exports (%)	..	-1.5	12.7	21.8	-0.4	-3.2	-3.3

.. not applicable

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

### SELECTED EXPORT COMMODITIES, Percentage of total exports

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	%	%	%	%	%	%	%
Coal, coke and briquettes	8.4	8.3	6.6	7.1	8.8	8.1	7.7
Iron, steel, non-ferrous metals	6.3	6.2	7.0	6.6	6.3	5.9	5.4
Food and live animals	14.1	13.8	13.4	13.5	14.6	12.4	12.8
Tourism products and services	11.2	12.0	11.6	11.1	11.2	11.2	12.1

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

## ANALYSIS OF RESULTS *continued*

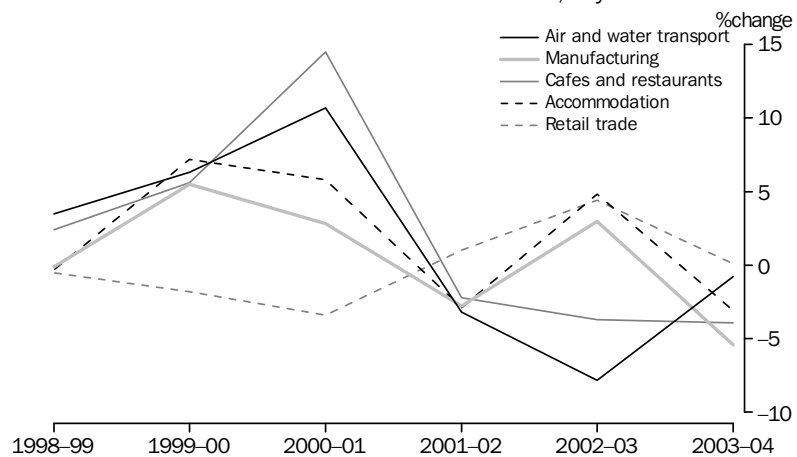
### TOURISM EMPLOYED PERSONS

The tourism industry employed 536,600 persons in 2003–04. The number of tourism employed persons grew 5.5% between 1997–98 and 2003–04, slower than the growth in total employed persons (11.1%) over that period. Consequently, the tourism share of total employed persons fell from 5.9% in 1997–98 to 5.6% in 2003–04.

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

The Retail trade industry generated the most tourism employment (26% of total tourism employment). The Retail trade, Accommodation, and the Cafes and restaurants industries account for more than half of the employment generated by tourism.

### GROWTH IN TOURISM EMPLOYED PERSONS, By selected industries

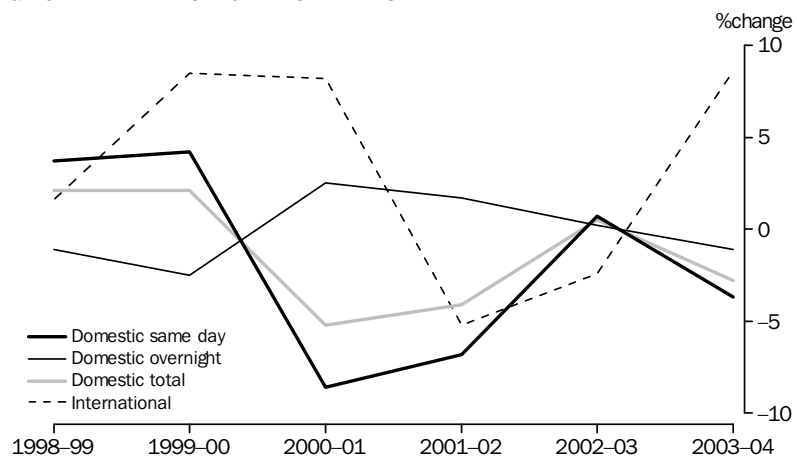


### VISITOR NUMBERS

Trips by domestic visitors declined in 2003–04 by 2.8%. The number of overnight trips decreased by 1% while the number of day trips decreased by 4%.

There were over 5 million short term international visitor arrivals to Australia during 2003–04 – the highest level ever. This represents the first annual increase since the previous peak which occurred during 2000–01. During 2001–02 and 2002–03 there were declines of 5% and 2% respectively.

### GROWTH IN VISITOR NUMBERS





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## TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT

1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04

## TOURISM GROSS DOMESTIC PRODUCT AND ASSOCIATED STATISTICS

Tourism gross value added at basic prices (\$m)	21 894	23 054	23 994	25 044	25 250	25 939	26 016
plus Net taxes on tourism products (\$m)	3 048	3 213	3 321	5 817	5 637	6 041	5 935
equals tourism GDP (\$m)	24 942	26 267	27 316	30 861	30 887	31 980	31 952
Gross domestic product(a) (\$m)	559 139	589 597	623 461	668 426	713 229	758 147	813 225
<b>Tourism share of gross value added(b) (%)</b>	<b>4.3</b>	<b>4.3</b>	<b>4.2</b>	<b>4.1</b>	<b>3.9</b>	<b>3.8</b>	<b>3.5</b>
<b>Tourism share of gross domestic product(b) (%)</b>	<b>4.5</b>	<b>4.5</b>	<b>4.4</b>	<b>4.6</b>	<b>4.3</b>	<b>4.2</b>	<b>3.9</b>

## PERCENTAGE CHANGES (c)

Tourism gross value added at basic prices (%)	..	5.3	4.1	4.4	0.8	2.7	0.3
plus Net taxes on tourism products (%)	..	5.4	3.4	75.2	-3.1	7.2	-1.7
equals tourism GDP (%)	..	5.3	4.0	13.0	0.1	3.5	-0.1
Gross domestic product (%)	..	5.4	5.7	7.2	6.7	6.3	7.3

.. not applicable

(a) Source: Australian System of National Accounts, 2003-04 (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 preceding year.

## TOURISM INDUSTRY GDP, By type of visitor

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
TOURISM INDUSTRY GDP (\$m)							
Domestic							
Households	16 931	17 789	18 276	20 055	20 342	21 463	21 098
Business/government	2 702	2 877	2 972	3 331	3 162	3 251	3 215
<i>Total domestic</i>	19 632	20 666	21 248	23 387	23 504	24 714	24 313
International	5 310	5 601	6 068	7 475	7 383	7 265	7 639
<i>Total</i>	24 942	26 267	27 316	30 861	30 887	31 980	31 952
SHARE OF TOURISM INDUSTRY GDP (%)							
Domestic							
Households	67.9	67.7	66.9	65.0	65.9	67.1	66.0
Business/government	10.8	11.0	10.9	10.8	10.2	10.2	10.1
<i>Total domestic</i>	78.7	78.7	77.8	75.8	76.1	77.3	76.1
International	21.3	21.3	22.2	24.2	23.9	22.7	23.9
<i>Total</i>	100.0	100.0	100.0	100.0	100.0	100.0	100.0
TOURISM INDUSTRY SHARE OF GDP (%)							
Domestic							
Households	3.0	3.0	2.9	3.0	2.9	2.8	2.6
Business/government	0.5	0.5	0.5	0.5	0.4	0.4	0.4
<i>Total domestic</i>	3.5	3.5	3.4	3.5	3.3	3.3	3.0
International	0.9	1.0	1.0	1.1	1.0	1.0	0.9
<i>Total</i>	4.5	4.5	4.4	4.6	4.3	4.2	3.9

## TOURISM INDUSTRY OUTPUT AT BASIC PRICES

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
<b>Tourism characteristic industries</b>							
Travel agency and tour operator services	1 895	1 972	2 080	2 253	2 193	2 215	2 184
Taxi transport	445	501	506	559	531	538	549
Air and water transport	9 402	9 794	10 263	11 276	10 868	10 763	10 652
Motor vehicle hiring	712	800	864	877	886	920	905
Accommodation	5 541	5 889	6 103	6 906	7 105	7 259	7 319
Cafes, restaurants and food outlets	5 569	6 109	6 187	6 287	6 539	6 759	6 534
<i>Total tourism characteristic industries</i>	<i>23 564</i>	<i>25 066</i>	<i>26 002</i>	<i>28 158</i>	<i>28 123</i>	<i>28 453</i>	<i>28 144</i>
<b>Tourism connected industries</b>							
Clubs, pubs, taverns and bars	3 039	3 329	3 399	3 425	3 572	3 704	3 656
Other road transport	1 569	1 678	1 813	1 778	1 739	1 758	1 723
Rail transport	710	761	821	790	778	784	768
Food manufacturing	2 352	2 588	2 681	2 839	2 730	2 855	2 817
Beverage manufacturing	1 182	1 348	1 348	1 520	1 564	1 666	1 584
Transport equipment manufacturing	547	663	660	748	812	730	699
Other manufacturing	4 383	4 243	4 458	5 278	4 813	4 774	4 731
Automotive fuel retailing	335	335	351	364	368	388	395
Other retail trade	4 892	4 869	5 128	5 316	5 369	5 646	5 745
Casinos and other gambling services	253	280	280	245	269	284	315
Libraries, museums and arts	654	685	658	739	727	760	820
Other entertainment services	1 315	1 393	1 340	1 497	1 472	1 541	1 664
Education	853	1 021	1 174	1 285	1 486	1 533	1 743
Ownership of dwellings	1 527	1 645	1 746	1 859	1 987	2 075	2 038
<i>Total tourism connected industries</i>	<i>23 612</i>	<i>24 838</i>	<i>25 857</i>	<i>27 684</i>	<i>27 686</i>	<i>28 497</i>	<i>28 696</i>
All other industries	4 934	5 216	5 679	5 773	5 770	6 095	6 066
<b>Total</b>	<b>52 111</b>	<b>55 119</b>	<b>57 537</b>	<b>61 614</b>	<b>61 579</b>	<b>63 046</b>	<b>62 906</b>

## TOURISM INDUSTRY GROSS VALUE ADDED

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
<b>Tourism characteristic industries</b>							
Travel agency and tour operator services	835	869	895	992	966	975	962
Taxi transport	174	195	197	218	207	210	214
Air and water transport	3 211	3 309	3 430	3 727	3 592	3 557	3 521
Motor vehicle hiring	231	259	280	284	287	298	293
Accommodation	2 400	2 551	2 644	2 775	2 855	2 917	2 941
Cafes, restaurants and food outlets	2 209	2 362	2 454	2 501	2 601	2 689	2 599
<i>Total tourism characteristic industries</i>	<i>9 059</i>	<i>9 546</i>	<i>9 901</i>	<i>10 498</i>	<i>10 509</i>	<i>10 646</i>	<i>10 531</i>
<b>Tourism connected industries</b>							
Clubs, pubs, taverns and bars	1 084	1 187	1 212	1 226	1 279	1 326	1 309
Other road transport	676	704	743	709	693	700	687
Rail transport	379	407	439	419	412	416	407
Food manufacturing	593	642	655	683	657	687	678
Beverage manufacturing	392	446	446	503	518	552	524
Transport equipment manufacturing	191	217	203	206	224	201	192
Other manufacturing	1 473	1 392	1 385	1 568	1 430	1 419	1 406
Automotive fuel retailing	166	167	174	171	173	182	185
Other retail trade	2 079	2 087	2 180	2 124	2 145	2 255	2 295
Casinos and other gambling services	158	177	180	158	173	183	203
Libraries, museums and arts	366	397	388	446	440	459	495
Other entertainment services	631	664	635	705	693	726	784
Education	756	895	1 017	1 101	1 272	1 313	1 493
Ownership of dwellings	1 323	1 412	1 483	1 553	1 660	1 734	1 702
<i>Total tourism connected industries</i>	<i>10 268</i>	<i>10 795</i>	<i>11 139</i>	<i>11 572</i>	<i>11 769</i>	<i>12 152</i>	<i>12 360</i>
All other industries	2 567	2 714	2 955	2 974	2 973	3 140	3 125
<i>Total</i>	<i>21 894</i>	<i>23 054</i>	<i>23 994</i>	<i>25 044</i>	<i>25 250</i>	<i>25 939</i>	<i>26 016</i>
Net taxes on tourism products	3 048	3 213	3 321	5 817	5 637	6 041	5 935
<b>Tourism GDP</b>	<b>24 942</b>	<b>26 267</b>	<b>27 316</b>	<b>30 861</b>	<b>30 887</b>	<b>31 980</b>	<b>31 952</b>

## GROSS VALUE ADDED, By industry division(a)

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Agriculture, forestry and fishing	17 303	18 155	18 545	23 044	27 330	21 164	24 846
Mining	24 583	24 256	26 698	34 051	33 820	34 271	32 991
Manufacturing	69 892	70 036	71 096	73 025	76 707	82 462	88 307
Electricity, gas and water supply	13 741	14 144	14 317	15 479	16 096	16 961	18 584
Construction	31 172	34 221	38 531	33 875	39 608	45 668	50 702
Wholesale trade	28 880	30 747	32 215	33 484	36 093	39 282	41 840
Retail trade	29 977	31 538	33 012	32 769	36 034	39 403	42 585
Accommodation, cafes and restaurants	12 051	13 237	14 334	14 877	14 915	15 456	16 511
Transport and storage	28 886	30 825	31 184	32 399	34 800	37 389	41 476
Communication services	17 157	18 087	18 159	18 799	19 163	20 351	21 943
Finance and insurance	33 826	35 386	41 331	46 991	52 626	57 963	62 106
Property and business services	55 238	61 034	66 560	73 392	75 441	79 391	85 602
Government administration and defence	22 274	23 493	23 742	24 894	27 512	29 634	31 765
Education	25 164	26 693	27 608	29 729	31 130	33 144	35 545
Health and community services	31 136	33 136	34 986	38 348	41 163	43 957	47 116
Cultural and recreational services	9 703	10 147	10 763	11 887	12 470	13 160	13 873
Personal and other services	12 137	12 991	14 379	14 799	16 023	17 494	17 971
Ownership of dwellings(b)	49 626	52 389	55 202	57 924	61 415	63 860	67 737
<b>Total</b>	<b>512 746</b>	<b>540 515</b>	<b>572 662</b>	<b>609 766</b>	<b>652 346</b>	<b>691 010</b>	<b>741 500</b>
<b>of which Tourism</b>	<b>21 894</b>	<b>23 054</b>	<b>23 994</b>	<b>25 044</b>	<b>25 250</b>	<b>25 939</b>	<b>26 016</b>

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

(b) Part of Property and business services ANZSIC division.  
Source: Australian System of National Accounts, 2003-04 (cat. no. 5204.0).

## TOURISM CONSUMPTION, By type of visitor

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
DOMESTIC HOUSEHOLDS (a)							
Tourism characteristic products							
Travel agency and tour operator services	1 178	1 205	1 262	1 354	1 327	1 360	1 341
Taxi fares	140	173	161	192	180	180	181
Long distance passenger transportation	3 730	3 908	4 054	4 149	4 002	4 059	4 091
Motor vehicle hire and lease	268	340	407	476	478	489	448
Accommodation services	2 159	2 383	2 483	2 925	3 010	3 166	3 189
Takeaway and restaurant meals(b)	7 193	7 874	7 890	8 663	9 048	9 441	8 991
Shopping (including gifts and souvenirs)	7 348	7 348	7 977	8 705	8 618	9 306	9 380
<i>Total tourism characteristic products</i>	<i>22 016</i>	<i>23 231</i>	<i>24 233</i>	<i>26 463</i>	<i>26 663</i>	<i>28 001</i>	<i>27 621</i>
Tourism connected products							
Local area passenger transportation	151	158	150	159	163	168	158
Repair and maintenance of motor vehicles	450	377	446	416	407	372	380
Fuel (petrol, diesel)	3 181	3 290	3 498	3 884	3 461	3 495	3 294
Food products	3 759	4 037	4 201	4 408	4 335	4 627	4 564
Alcoholic beverages and other beverages	2 248	2 547	2 526	2 729	2 793	2 921	2 770
Motor vehicles, caravans, boats, etc	912	1 053	1 041	1 025	1 060	1 050	1 022
Recreational, cultural and sports services	1 733	1 815	1 704	2 129	2 048	2 158	2 323
Gambling and betting services	494	559	602	652	688	730	791
Education	76	89	89	90	89	95	101
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688	1 763	1 716
<i>Total tourism connected products</i>	<i>14 300</i>	<i>15 321</i>	<i>15 739</i>	<i>17 064</i>	<i>16 731</i>	<i>17 377</i>	<i>17 119</i>
Other tourism goods and services	2 453	2 457	2 567	2 488	2 493	2 863	2 634
<i>Total</i>	<i>38 770</i>	<i>41 009</i>	<i>42 539</i>	<i>46 016</i>	<i>45 887</i>	<i>48 241</i>	<i>47 374</i>

## DOMESTIC BUSINESS/GOVERNMENT (a)

Tourism characteristic products							
Travel agency and tour operator services	471	506	531	559	550	563	577
Taxi fares	200	231	239	274	256	256	258
Long distance passenger transportation	2 748	2 919	3 133	3 379	3 283	3 322	3 398
Motor vehicle hire and lease	278	288	266	225	228	256	253
Accommodation services	1 517	1 517	1 452	1 689	1 680	1 759	1 713
Takeaway and restaurant meals(b)	407	497	496	495	518	546	520
Shopping (including gifts and souvenirs)	12	15	21	22	21	22	22
<i>Total tourism characteristic products</i>	<i>5 632</i>	<i>5 973</i>	<i>6 137</i>	<i>6 644</i>	<i>6 535</i>	<i>6 725</i>	<i>6 741</i>
Tourism connected products							
Local area passenger transportation	4	5	5	8	8	8	7
Repair and maintenance of motor vehicles	23	24	26	33	34	35	35
Fuel (petrol, diesel)	748	915	1 110	1 481	1 400	1 407	1 309
Food products	45	52	56	54	52	57	53
Alcoholic beverages and other beverages	41	42	43	42	43	53	50
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—	—
Recreational, cultural and sports services	1	1	1	—	—	—	—
Gambling and betting services	—	—	—	—	—	—	—
Education	41	45	45	45	44	47	51
Actual and imputed rent on holiday houses	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>902</i>	<i>1 084</i>	<i>1 286</i>	<i>1 663</i>	<i>1 581</i>	<i>1 607</i>	<i>1 505</i>
Other tourism goods and services	62	63	62	61	60	67	73
<i>Total</i>	<i>6 596</i>	<i>7 120</i>	<i>7 485</i>	<i>8 367</i>	<i>8 176</i>	<i>8 399</i>	<i>8 319</i>

— nil or rounded to zero (including null cells)

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

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

TOURISM CONSUMPTION, By type of visitor *continued*

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
INTERNATIONAL							
Tourism characteristic products							
Travel agency and tour operator services	246	261	288	359	335	311	285
Taxi fares	100	92	101	111	111	116	125
Long distance passenger transportation	3 918	4 053	4 278	5 269	4 948	4 810	4 545
Motor vehicle hire and lease	173	181	201	224	227	229	256
Accommodation services	1 560	1 678	1 868	2 212	2 333	2 242	2 353
Takeaway and restaurant meals(a)	819	865	967	1 209	1 202	1 194	1 298
Shopping (including gifts and souvenirs)	2 011	2 059	2 097	2 377	2 318	2 204	2 288
<i>Total tourism characteristic products</i>	<i>8 828</i>	<i>9 190</i>	<i>9 799</i>	<i>11 761</i>	<i>11 475</i>	<i>11 106</i>	<i>11 150</i>
Tourism connected products							
Local area passenger transportation	163	158	171	199	191	188	191
Repair and maintenance of motor vehicles	18	21	20	18	20	14	18
Fuel (petrol, diesel)	139	151	182	219	195	184	209
Food products	779	831	931	1 104	1 119	1 125	1 219
Alcoholic beverages and other beverages	361	392	442	534	535	542	598
Motor vehicles, caravans, boats, etc	97	104	110	134	157	121	128
Recreational, cultural and sports services	221	253	286	373	349	348	383
Gambling and betting services	209	235	225	185	169	159	201
Education	801	972	1 143	1 281	1 501	1 546	1 762
Actual and imputed rent on holiday houses	230	248	263	285	299	313	322
<i>Total tourism connected products</i>	<i>3 017</i>	<i>3 364</i>	<i>3 772</i>	<i>4 331</i>	<i>4 535</i>	<i>4 540</i>	<i>5 031</i>
Other tourism goods and services	948	891	1 039	1 048	1 097	1 010	1 136
<i>Total</i>	<i>12 792</i>	<i>13 445</i>	<i>14 610</i>	<i>17 140</i>	<i>17 107</i>	<i>16 656</i>	<i>17 317</i>
TOTAL							
Tourism characteristic products							
Travel agency and tour operator services	1 895	1 972	2 080	2 272	2 212	2 234	2 204
Taxi fares	440	496	501	576	547	552	564
Long distance passenger transportation	10 395	10 880	11 465	12 797	12 233	12 191	12 034
Motor vehicle hire and lease	720	809	874	925	933	974	957
Accommodation services	5 237	5 579	5 803	6 826	7 023	7 167	7 255
Takeaway and restaurant meals(a)	8 419	9 236	9 352	10 367	10 768	11 181	10 808
Shopping (including gifts and souvenirs)	9 370	9 423	10 094	11 104	10 957	11 533	11 690
<i>Total tourism characteristic products</i>	<i>36 476</i>	<i>38 394</i>	<i>40 168</i>	<i>44 868</i>	<i>44 673</i>	<i>45 833</i>	<i>45 512</i>
Tourism connected products							
Local area passenger transportation	318	321	326	365	363	363	357
Repair and maintenance of motor vehicles	491	422	493	467	461	421	434
Fuel (petrol, diesel)	4 068	4 356	4 790	5 584	5 056	5 086	4 811
Food products	4 582	4 920	5 187	5 565	5 505	5 809	5 835
Alcoholic beverages and other beverages	2 650	2 980	3 011	3 305	3 370	3 515	3 418
Motor vehicles, caravans, boats, etc	1 009	1 157	1 151	1 158	1 216	1 172	1 150
Recreational, cultural and sports services	1 954	2 069	1 990	2 501	2 397	2 506	2 706
Gambling and betting services	703	794	826	838	858	889	992
Education	918	1 106	1 277	1 416	1 633	1 688	1 914
Actual and imputed rent on holiday houses	1 527	1 645	1 746	1 859	1 987	2 075	2 038
<i>Total tourism connected products</i>	<i>18 219</i>	<i>19 770</i>	<i>20 798</i>	<i>23 058</i>	<i>22 847</i>	<i>23 524</i>	<i>23 655</i>
Other tourism goods and services	3 463	3 411	3 668	3 597	3 651	3 940	3 842
<i>Total</i>	<i>58 158</i>	<i>61 575</i>	<i>64 634</i>	<i>71 524</i>	<i>71 171</i>	<i>73 297</i>	<i>73 010</i>

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



## DOMESTIC TOURISM CONSUMPTION, By length of stay

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
.....							
SAME DAY							
Tourism characteristic products							
Travel agency and tour operator services	4	5	6	6	5	6	5
Taxi fares	32	40	44	52	42	42	49
Long distance passenger transportation	409	371	419	498	411	358	478
Motor vehicle hire and lease	44	45	52	52	50	45	35
Accommodation services	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	1 739	2 032	2 096	2 153	2 134	2 267	2 090
Shopping (including gifts and souvenirs)	3 338	3 109	3 546	3 779	3 593	3 781	3 662
<i>Total tourism characteristic products</i>	<i>5 567</i>	<i>5 602</i>	<i>6 162</i>	<i>6 540</i>	<i>6 235</i>	<i>6 500</i>	<i>6 319</i>
Tourism connected products							
Local area passenger transportation	47	46	63	55	59	60	50
Repair and maintenance of motor vehicles	97	127	168	121	137	135	108
Fuel (petrol, diesel)	1 512	1 695	1 984	2 033	1 790	1 853	1 759
Food products	1 013	1 151	1 343	1 187	1 063	1 177	1 035
Alcoholic beverages and other beverages	496	538	583	546	510	557	508
Motor vehicles, caravans, boats, etc	474	545	540	532	550	545	530
Recreational, cultural and sports services	383	422	367	503	448	419	438
Gambling and betting services	140	212	228	247	261	277	300
Education	54	47	60	60	59	63	68
Actual and imputed rent on holiday houses	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>4 217</i>	<i>4 785</i>	<i>5 336</i>	<i>5 283</i>	<i>4 877</i>	<i>5 085</i>	<i>4 796</i>
Other tourism goods and services	863	834	910	813	702	811	942
<i>Total</i>	<i>10 646</i>	<i>11 221</i>	<i>12 407</i>	<i>12 636</i>	<i>11 814</i>	<i>12 396</i>	<i>12 057</i>
.....							
OVERNIGHT (b)							
Tourism characteristic products							
Travel agency and tour operator services	1 645	1 706	1 787	1 907	1 872	1 917	1 913
Taxi fares	307	364	356	413	393	395	390
Long distance passenger transportation	6 068	6 455	6 768	7 030	6 874	7 023	7 011
Motor vehicle hire and lease	503	583	621	650	656	700	666
Accommodation services	3 677	3 900	3 935	4 614	4 690	4 925	4 902
Takeaway and restaurant meals(a)	5 861	6 339	6 290	7 005	7 432	7 720	7 421
Shopping (including gifts and souvenirs)	4 021	4 254	4 451	4 949	5 046	5 547	5 740
<i>Total tourism characteristic products</i>	<i>22 082</i>	<i>23 602</i>	<i>24 207</i>	<i>26 568</i>	<i>26 963</i>	<i>28 227</i>	<i>28 044</i>
Tourism connected products							
Local area passenger transportation	107	117	93	112	112	116	115
Repair and maintenance of motor vehicles	375	274	305	329	304	272	308
Fuel (petrol, diesel)	2 416	2 510	2 624	3 333	3 071	3 048	2 843
Food products	2 790	2 938	2 914	3 275	3 323	3 507	3 581
Alcoholic beverages and other beverages	1 793	2 050	1 986	2 225	2 325	2 417	2 312
Motor vehicles, caravans, boats, etc	438	507	501	493	510	506	492
Recreational, cultural and sports services	1 351	1 393	1 338	1 626	1 600	1 739	1 885
Gambling and betting services	355	347	374	405	427	453	491
Education	63	86	74	75	74	79	84
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688	1 763	1 716
<i>Total tourism connected products</i>	<i>10 985</i>	<i>11 621</i>	<i>11 690</i>	<i>13 444</i>	<i>13 435</i>	<i>13 899</i>	<i>13 828</i>
Other tourism goods and services	1 653	1 685	1 719	1 735	1 852	2 119	1 764
<i>Total</i>	<i>34 720</i>	<i>36 909</i>	<i>37 616</i>	<i>41 748</i>	<i>42 250</i>	<i>44 245</i>	<i>43 636</i>
.....							

— nil or rounded to zero (including null cells)

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

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

DOMESTIC TOURISM CONSUMPTION, By length of stay *continued*

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
TOTAL DOMESTIC							
Tourism characteristic products							
Travel agency and tour operator services	1 649	1 711	1 792	1 913	1 877	1 923	1 918
Taxi fares	339	404	400	466	436	437	439
Long distance passenger transportation	6 477	6 826	7 187	7 528	7 285	7 381	7 489
Motor vehicle hire and lease	547	628	673	702	706	745	701
Accommodation services	3 677	3 900	3 935	4 614	4 690	4 925	4 902
Takeaway and restaurant meals(a)	7 600	8 371	8 385	9 158	9 566	9 987	9 510
Shopping (including gifts and souvenirs)	7 359	7 364	7 998	8 727	8 639	9 329	9 402
<i>Total tourism characteristic products</i>	<i>27 648</i>	<i>29 204</i>	<i>30 369</i>	<i>33 107</i>	<i>33 198</i>	<i>34 727</i>	<i>34 362</i>
Tourism connected products							
Local area passenger transportation	155	163	155	166	171	176	166
Repair and maintenance of motor vehicles	473	401	473	449	441	407	416
Fuel (petrol, diesel)	3 929	4 205	4 608	5 366	4 861	4 901	4 602
Food products	3 803	4 089	4 257	4 461	4 386	4 684	4 616
Alcoholic beverages and other beverages	2 289	2 588	2 569	2 771	2 835	2 973	2 820
Motor vehicles, caravans, boats, etc	912	1 053	1 041	1 025	1 060	1 050	1 022
Recreational, cultural and sports services	1 734	1 816	1 705	2 129	2 048	2 158	2 323
Gambling and betting services	494	559	602	652	688	730	791
Education	117	134	134	135	133	142	152
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688	1 763	1 716
<i>Total tourism connected products</i>	<i>15 202</i>	<i>16 405</i>	<i>17 026</i>	<i>18 727</i>	<i>18 312</i>	<i>18 985</i>	<i>18 624</i>
Other tourism goods and services	2 515	2 520	2 629	2 549	2 553	2 930	2 707
<i>Total</i>	<i>45 366</i>	<i>48 129</i>	<i>50 024</i>	<i>54 383</i>	<i>54 063</i>	<i>56 641</i>	<i>55 693</i>

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

## 8

## TOURISM CONSUMPTION, By Australian residents—Outbound trips

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
Domestically produced goods and services (\$m)	2 349	2 393	2 610	2 932	2 864	2 921	3 188
Imports of tourism goods and services							
Purchased by businesses (\$m)	3 222	3 110	3 505	3 922	3 747	3 744	4 145
Purchased by households (\$m)	8 031	9 091	9 851	10 804	10 961	11 142	12 367
Total (\$m)	11 253	12 201	13 356	14 726	14 707	14 886	16 512
<b>Total consumption by Australian residents on outbound trips (\$m)</b>	<b>13 602</b>	<b>14 594</b>	<b>15 966</b>	<b>17 658</b>	<b>17 571</b>	<b>17 806</b>	<b>19 700</b>
Average consumption by Australian residents on outbound trips (\$)	4 486	4 577	4 791	4 936	5 217	5 407	5 004

## 9

## TOURISM CONSUMPTION, By non-residents—Inbound trips

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
Overseas produced goods and services (\$m)	3 861	3 804	4 143	4 897	4 934	4 626	4 548
Exports of tourism goods and services							
Purchased by businesses (\$m)	1 357	1 136	1 156	1 333	1 264	1 209	1 277
Purchased by households (\$m)	11 435	12 310	13 454	15 807	15 843	15 447	16 039
Total(a) (\$m)	12 792	13 445	14 610	17 140	17 107	16 656	17 317
<b>Total consumption by non-residents on inbound trips (\$m)</b>	<b>16 654</b>	<b>17 250</b>	<b>18 754</b>	<b>22 037</b>	<b>22 042</b>	<b>21 283</b>	<b>21 864</b>
Average consumption by non-residents on inbound trips (\$)	3 946	4 023	4 032	4 380	4 623	4 571	4 323

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

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	'000	'000	'000	'000	'000	'000	'000
Tourism characteristic and connected industries(b)							
Travel agency and tour operator services	24.9	25.5	23.9	23.8	23.6	22.0	22.2
Road transport and motor vehicle hiring	24.1	24.2	23.8	24.5	25.3	25.0	26.2
Air and water transport	31.0	32.1	34.1	37.8	36.5	33.7	33.4
Accommodation	84.4	84.2	90.3	95.6	92.8	97.3	94.2
Cafes and restaurants	45.3	46.4	49.0	56.1	54.9	52.8	50.7
Clubs, pubs, taverns and bars	26.8	26.7	27.4	27.6	26.3	25.2	25.7
Rail transport	4.0	4.0	3.6	4.1	3.5	3.9	4.2
Manufacturing	42.2	42.2	44.5	45.8	44.5	45.8	43.4
Retail trade	141.0	140.2	137.8	133.1	134.4	140.4	140.5
Casinos and other gambling services	2.5	2.0	2.0	2.0	1.9	1.7	1.8
Libraries, museums and arts	8.2	8.9	8.5	10.5	10.3	10.3	9.6
Other entertainment services	14.2	14.5	15.0	14.1	15.4	16.5	16.5
Education	17.8	19.3	20.7	22.9	23.9	24.6	25.8
<i>Tourism characteristic and connected industries</i>	<i>466.5</i>	<i>470.4</i>	<i>480.7</i>	<i>497.8</i>	<i>493.3</i>	<i>499.3</i>	<i>494.2</i>
All other industries	42.4	42.5	44.0	39.9	40.5	41.5	42.4
<b>Total tourism employed persons</b>	<b>508.8</b>	<b>512.9</b>	<b>524.7</b>	<b>537.7</b>	<b>533.7</b>	<b>540.7</b>	<b>536.6</b>
Total employed persons	8 574.6	8 638.4	8 886.6	9 074.3	9 207.4	9 441.4	9 528.0
<b>Tourism share of total employment (%)</b>	<b>5.9</b>	<b>5.9</b>	<b>5.9</b>	<b>5.9</b>	<b>5.8</b>	<b>5.7</b>	<b>5.6</b>

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

(b) The industries shown in the employment tables are at a more aggregated level than that shown in the monetary tables. For a concordance, see Appendix 2.

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	'000	'000	'000	'000	'000	'000	'000
Domestic							
Same day	154 581	160 316	167 054	152 765	142 302	143 260	137 900
Overnight	74 665	73 830	72 017	73 819	75 047	75 216	74 356
<i>Total</i>	<i>229 246</i>	<i>234 146</i>	<i>239 071</i>	<i>226 584</i>	<i>217 349</i>	<i>218 476</i>	<i>212 256</i>
International	4 220	4 288	4 652	5 031	4 768	4 656	5 057

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	'000	'000	'000	'000	'000	'000	'000
<b>Oceania &amp; Antarctica</b>							
New Zealand	695.7	718.9	773.1	828.4	787.7	793.1	926.1
Total(a)	814.6	855.0	908.6	960.9	907.5	904.7	1 047.0
<b>North-west Europe</b>							
Germany	130.2	129.8	147.2	147.5	136.8	134.0	141.0
United Kingdom	445.1	483.1	554.4	605.4	627.1	644.2	686.4
Total(a)	814.0	874.8	1 009.3	1 079.8	1 068.0	1 070.9	1 138.8
<b>Southern &amp; Eastern Europe</b>							
Italy	46.3	48.5	54.4	54.6	41.1	42.5	43.7
Total(a)	95.6	105.5	118.1	132.9	101.4	98.1	106.5
<b>Middle East &amp; North Africa</b>							
Total	35.4	46.2	52.0	56.6	55.7	50.1	56.4
<b>Southeast Asia</b>							
Indonesia	120.0	100.4	83.1	98.3	94.7	86.9	91.5
Malaysia	124.8	128.1	146.8	148.4	154.3	142.4	175.3
Singapore	256.9	244.5	277.0	293.3	295.8	261.6	252.6
Thailand	44.9	59.5	68.0	77.9	80.0	75.5	78.8
Total(a)	602.2	590.5	634.4	676.7	682.7	617.7	654.1
<b>Northeast Asia</b>							
China (excludes SARs and Taiwan Province)	71.9	81.6	105.0	143.5	172.3	177.1	216.9
Hong Kong (SAR of China)	144.3	138.7	149.0	154.1	148.6	140.7	132.2
Japan	797.0	725.8	705.5	724.2	659.2	658.6	687.5
Korea	133.2	88.4	139.4	164.6	181.1	195.8	215.8
Taiwan (Province of China)	154.8	147.3	140.9	124.3	99.1	80.8	103.9
Total(a)	1 303.9	1 185.2	1 242.8	1 314.3	1 262.4	1 254.8	1 358.5
<b>Southern &amp; Central Asia</b>							
Total	40.8	46.8	55.4	65.1	62.0	55.9	71.3
<b>The Americas</b>							
United States of America	355.7	393.7	436.9	502.1	424.4	423.5	430.1
Total(a)	449.8	500.1	551.1	645.0	551.1	537.1	551.9
<b>Sub-Saharan Africa</b>							
Total	58.8	77.8	72.4	74.5	73.3	62.8	72.4
<b>Not stated</b>							
	4.7	6.1	7.7	25.5	4.3	3.7	0.2
<b>Total</b>	<b>4 220.0</b>	<b>4 288.0</b>	<b>4 651.8</b>	<b>5 031.3</b>	<b>4 768.3</b>	<b>4 655.8</b>	<b>5 057.2</b>

(a) Includes other.

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

## SHORT-TERM DEPARTURES, Australian residents—By main destination

	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04
	'000	'000	'000	'000	'000	'000	'000
<b>Oceania &amp; Antarctica</b>							
New Zealand	429.2	477.4	506.7	574.5	592.2	615.3	739.2
Total(a)	652.8	725.9	776.8	810.3	843.7	888.2	1 057.0
<b>North-west Europe</b>							
Germany	38.1	39.3	39.5	43.5	43.5	42.1	44.9
United Kingdom	327.4	306.0	330.2	323.2	308.0	308.9	351.4
Total(a)	480.4	469.9	504.6	510.8	478.5	492.1	550.9
<b>Southern &amp; Eastern Europe</b>							
Italy	61.0	66.2	64.7	76.7	70.8	71.0	84.2
Total(a)	174.2	168.3	186.2	209.1	190.7	188.0	222.6
<b>Middle East &amp; North Africa</b>							
Total	69.4	78.4	76.6	87.4	76.6	76.2	118.5
<b>Southeast Asia</b>							
Indonesia	324.0	349.0	256.8	294.8	270.9	194.4	271.1
Malaysia	104.2	111.9	126.3	134.8	109.5	97.8	126.0
Singapore	115.8	133.8	145.9	153.6	163.2	119.1	148.4
Thailand	103.8	137.5	147.8	157.7	163.4	150.5	153.8
Total(a)	763.1	854.1	801.0	897.7	860.9	721.9	894.4
<b>Northeast Asia</b>							
China (excludes SARs and Taiwan Province)	81.6	81.8	86.3	100.6	121.3	117.9	150.2
Hong Kong (SAR of China)	142.0	142.7	149.7	156.8	142.0	114.8	140.1
Japan	56.6	62.0	64.6	67.7	71.6	72.5	79.6
Korea	17.6	17.3	19.8	23.0	23.9	24.7	27.0
Taiwan (Province of China)	35.3	32.4	34.9	35.8	35.4	33.2	39.4
Total(a)	334.7	337.7	357.0	386.4	396.1	364.8	438.9
<b>Southern &amp; Central Asia</b>							
Total	68.8	69.6	78.5	85.4	76.5	84.4	110.4
<b>The Americas</b>							
United States of America	346.2	323.9	373.7	372.6	276.0	287.4	342.1
Total(a)	422.1	410.0	467.7	487.1	370.8	397.9	456.7
<b>Sub-Saharan Africa</b>							
Total	51.5	50.4	57.8	53.7	57.2	63.5	71.3
<b>Not stated</b>							
Total	14.8	24.2	26.1	49.5	16.9	16.3	16.1
<b>Total</b>	<b>3 031.9</b>	<b>3 188.7</b>	<b>3 332.3</b>	<b>3 577.3</b>	<b>3 367.9</b>	<b>3 293.3</b>	<b>3 936.8</b>

(a) Includes other.

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

## EXPLANATORY NOTES

### INTRODUCTION

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

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

**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 caused an increase in the current dollar value of tourism consumption and tourism GDP in 2000–01 and later years. This increase would occur 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 the *System of National Accounts 1993* (SNA93), which is the prevailing international standard for national accounts statistics.

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

## EXPLANATORY NOTES *continued*

### DIRECT AND INDIRECT ECONOMIC IMPACTS

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

**8** Indirect tourism demand is a broader notion that includes the downstream effects of tourism demand. For example, when a visitor buys a meal, indirect tourism demand is generated for the food manufacturer, the transporter, the electricity company, etc., that provide the necessary inputs required to make the meal. To fully measure the indirect effects, account should also be taken of changes in incomes which may feed through to further changes in tourism demand. A full analysis of indirect effects is best done using economic modelling. Tourism Research Australia (formerly Bureau of Tourism Research) have undertaken this work and their latest results are reported in the *Tourism Research Report* (Volume 5, No. 2 2004) *Indirect Economic Contribution of Tourism to Australia, 2001–02*.

### CONCEPTS OF TOURISM *Tourism*

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

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

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

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

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

### *Visitors*

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

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

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

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

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

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



## EXPLANATORY NOTES *continued*

### *Visitors continued*

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

### *Usual environment*

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

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

### *Tourism consumption*

**19** Tourism consumption is defined as

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

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

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

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

### *Tourism gross value added and tourism GDP*

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

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

## EXPLANATORY NOTES *continued*

### *Tourism gross value added and tourism GDP continued*

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

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

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

### *Gross fixed capital formation*

**27** Purchases of capital assets are excluded from tourism demand for the purposes of calculating tourism gross value added, as there is no direct relationship between the visitor and the acquisition of capital by the tourism industries. To include gross fixed capital formation in the tourism industry output and value added would also require that other industries be measured on a similar basis to allow for valid comparisons (e.g. the construction of a warehouse by a wholesaler would have to be attributed as output of the wholesale industry). Under such an approach the construction industry and much of the manufacturing industry would cease to exist.

**28** The services that capital investment provide are captured to the extent that products implicitly include a component to cover the cost of capital. Whilst the purchase of capital by tourism industries is of significant analytical interest in its own right, data of sufficient quality are not available for publication in the Australian TSA. Industry data for gross fixed capital expenditure presents a number of difficulties, one being that operating leases of assets are included in the industry of the lessor, not the lessee.

### *Classifications*

**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.

## EXPLANATORY NOTES *continued*

### *Classifications continued*

**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.

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

### TOURISM SATELLITE ACCOUNT FRAMEWORK

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

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

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

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

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

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

### CALCULATING BENCHMARK TOURISM GROSS VALUE ADDED AND TOURISM GDP

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

## EXPLANATORY NOTES *continued*

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

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

### UPDATE METHODOLOGY

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

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

### DATA SOURCES

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

#### *Tourism consumption data*

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

## EXPLANATORY NOTES *continued*

Tourism consumption data  
*continued*

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

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

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

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

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

**50** For the 1997–98 TSA the imputation for non-market services provided by government utilised data on visitor numbers from *Cultural Trends in Australia* (cat. no. 4172.0), whilst the imputation for foreign exchange margins was derived using international visitors' expenditure data, and data for currency buy/sell rates. These estimates have been extrapolated for the years 1998–99 to 2003–04 using movements in government final consumption expenditure on relevant products for the government imputation, and movements in the number of short term arrivals for the foreign exchange imputation.

**51** Tourism consumption at basic prices (tourism output) has been calculated by removing the net taxes, margins and imports from tourism consumption at purchaser prices. For 1998–99, 1999–2000, 2000–01, 2001–02 and 2002–03 this was done using relationships in the supply and use tables for those years. The supply and use table for 2003–04 is not available yet. In relation to taxes, for the benchmark year of 2000–01, the supply and use tables reflect the GST, and these relationships have been projected forward for subsequent years. 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.

## EXPLANATORY NOTES *continued*

### *Industry data*

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

**53** 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 and 2000–01 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.

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

### *Employment*

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

**56** 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.

**57** 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

**58** 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

**59** 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).

## EXPLANATORY NOTES *continued*

### QUALITY OF ESTIMATES

**60** 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.

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

**62** Tourism expenditure data are generally obtained from large scale visitor surveys that are scientifically designed to produce estimates of good quality. These data are a key component of the TSA. In order to adapt these data to the concepts and classifications required for the TSA, some dissection and rearrangement of the data has been required. While the rearrangement of the basic data can impact on the quality of tourism consumption estimates for individual products, the aggregate level of tourism consumption should not be affected, although the estimate of tourism gross value added could be.

**63** 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.

**64** 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 and 2000–01. The underlying assumption of this approach is that structural change occurs only slowly. The extrapolation techniques used in the TSA updates may not fully capture structural changes in the tourism industry and the Australian economy. To overcome this deficiency the benchmark coefficients can be altered in the TSA updates where there is strong evidence of structural change in tourism related industries. As the benchmark relationships are likely to become less relevant over time, extrapolated estimates only remain tenable where there is a realignment to periodic benchmarks.

**65** 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.

## 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 products</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>
Travel agency and tour operator services	6641	Travel agency services
Taxi transport	6123	Taxi and other road passenger transport
Other road transport	611	Road freight transport
	6121	Long distance bus transport
	6122	Short distance bus transport
Rail transport	62	Rail transport
Air and water transport	63	Water transport
	64	Air and space transport
Motor vehicle hiring	7741	Motor vehicle hiring
Automotive fuel retailing	5321	Automotive fuel retailing
Accommodation	5710	Accommodation
Ownership of dwellings	7711	Residential property operators
Cafes, restaurants and takeaway food outlets	5125	Takeaway food retailing
	5730	Cafes and restaurants
Food manufacturing	211	Meat and meat product manufacturing
	212	Dairy product manufacturing
	213	Fruit and vegetable processing
	214	Oil and fat manufacturing
	215	Flour mill and cereal food manufacturing
	216	Bakery product manufacturing
	217	Other food manufacturing
Beverage manufacturing	218	Beverage and malt manufacture
Transport equipment manufacturing	281	Motor vehicle and part manufacturing
	282	Other transport equipment manufacturing
Other manufacturing	219	Tobacco product manufacturing
	22	Textile, clothing, footwear and leather manufacturing
	23	Wood and paper product manufacturing
	24	Printing, publishing and recorded media
	25	Petroleum, coal, chemical and associated product manufacturing
	26	Non-metallic mineral product manufacturing
	27	Metal product manufacturing
	283	Machinery and equipment manufacturing
	284	Electronic manufacturing
	285	Electrical equipment and appliance manufacturing
	286	Industry machinery and equipment manufacturing
	29	Other manufacturing

## APPENDIX 2 TOURISM INDUSTRY CONCORDANCE *continued*

### TOURISM RELATED INDUSTRIES *continued*

<i>Characteristic and connected tourism products</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>	
Other retail trade	51	Food retailing (except takeaway food retailing (5125))	
	52	Personal and household good retailing	
	531	Motor vehicle retailing	
	5322	Automotive electrical services	
	5323	Smash repairing	
	5324	Tyre retailing	
	5329	Automotive repair and services nec	
	Clubs, pubs, taverns and bars	5720	Pubs, taverns and bars
		5740	Clubs (hospitality)
Casinos and other gambling services		932	Gambling services
	Libraries, museums and arts	92	Libraries, museums and arts
Other entertainment services		91	Motion picture, radio and television services
	931	Sport	
	933	Other recreation services	
Education	84	Education	
All other industries		All other industries	

### TOURISM RELATED INDUSTRIES FOR EMPLOYMENT ESTIMATES

Employment estimates are provided at a more 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

<b>Basic price</b>	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> .
<b>Current prices</b>	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.
<b>Consumption by international visitors</b>	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by non-residents on tourism related products, including those sold at prices that are not economically significant. See also <i>Tourism consumption; Tourism business and government consumption; Tourism household consumption</i> .
<b>Direct tourism demand</b>	A direct economic impact is generated where a direct physical or economic relationship between the visitor and producer of the good or service exists. See also <i>Indirect tourism demand</i> .
<b>Economically significant prices</b>	Prices which have a significant influence on both the amounts the producers are willing to supply and the amounts purchasers wish to buy. See also <i>Basic prices; Purchasers' prices</i> .
<b>Employed person</b>	Is a person aged 15 years and over who, during the reference week: <ul style="list-style-type: none"><li>■ 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)</li><li>■ worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers)</li><li>■ 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</li><li>■ were employers, own account workers or contributing family workers who had a job, business or farm, but were not at work.</li></ul>
<b>Exports of goods and services</b>	The value of goods exported and amounts receivable from non-residents for the provision of services by residents.
<b>Final consumption expenditure – general government</b>	Net expenditure on goods and services by public authorities, other than those classified as public corporations, which does not result in the creation of fixed assets or inventories or in the acquisition of land and existing buildings or second-hand assets. It comprises expenditure on compensation of employees (other than those charged to capital works, etc.), goods and services (other than fixed assets and inventories) and consumption of fixed capital. Expenditure on repair and maintenance of roads is included. Fees, 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.
<b>Final consumption expenditure – households</b>	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

## GLOSSARY *continued*

<b>Final consumption expenditure – households</b> <i>continued</i>	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.
<b>Gross domestic product (GDP)</b>	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. <i>Gross farm product</i> is that part of gross domestic product which arises from production in agriculture and services to agriculture. <i>Gross non-farm product</i> arises from production in all other industries.
<b>Gross fixed capital formation</b>	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.
<b>Gross value added</b>	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> .
<b>Imports of goods and services</b>	The value of goods imported and amounts payable to non-residents for the provision of services to residents.
<b>Indirect tourism demand</b>	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> .
<b>Input-output table</b>	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.
<b>Intermediate consumption</b>	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> .
<b>Margin</b>	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.
<b>Other taxes on production</b>	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

## GLOSSARY *continued*

<b>Other taxes on production</b> <i>continued</i>	professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions. See also <i>Taxes on production and imports</i> and <i>Taxes on products</i> .
<b>Output</b>	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> .
<b>Purchasers' price.</b>	The purchaser's price is the amount paid by the purchaser, excluding any deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser. The purchaser's price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place. See also <i>Basic prices</i> ; <i>Economically significant prices</i> .
<b>Taxes less subsidies on production and imports</b>	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> .
<b>Taxes less subsidies on products.</b>	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> .
<b>Tourism</b>	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.
<b>Tourism business and government consumption</b>	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by resident businesses or governments, on tourism related products.
<b>Tourism characteristic industries</b>	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.
<b>Tourism characteristic products</b>	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.
<b>Tourism connected industries</b>	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.

## GLOSSARY *continued*

<b>Tourism connected products</b>	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.
<b>Tourism consumption</b>	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> .
<b>Tourism GDP</b>	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> .
<b>Tourism gross value added</b>	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> .
<b>Tourism household consumption</b>	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> .
<b>Tourism industry ratio</b>	This is the proportion of the total value added of an industry which is related to tourism.
<b>Tourism product ratio</b>	This is the proportion of the total supply of a product which is consumed by visitors.
<b>Usual environment</b>	This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study and other places frequently visited. The usual environment criteria has two dimensions. Frequency means places that are visited on a routine basis (at least once a week) are considered part of a person's usual environment, even if the place visited is located a considerable distance from place of residence. Distance means locations close (up to 40 kilometres from home for overnight trips and up to 50 kilometres from home (round trip) for day trips) to the place of residence of a person are also included in their usual environment.
<b>Visitor</b>	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'.

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