

AUSTRALIAN NATIONAL ACCOUNTS: TOURISM SATELLITE ACCOUNT

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

NOTES

- ABOUT THIS PUBLICATION** This publication presents the key results of the Tourism Satellite Account (TSA) for the years 1997–98 to 2001–02. It has been funded by the Department of Industry, Tourism and Resources.
- REVISIONS IN THIS ISSUE** The economy wide national accounting aggregates for 1997–98 to 2000–01 have been revised to make them consistent with the December quarter 2002 issue of *Australian National Accounts: National Income, Expenditure and Product* (cat. no. 5206.0).
- No revisions have been made to the tourism estimates for 1997–98 to 1999–2000. At the time of the release of the 2000–01 issue of this publication, data from the Bureau of Tourism Research's (BTR) International Visitor Survey (IVS) for 2000–01 were not available. In this issue the 2000–01 IVS data have been used to revise previously published estimates, with product details of international visitor consumption for 2000–01 being published for the first time.
- Visitor arrivals for 2000–01 have been revised since the previous issue of this publication, as a result of revisions to overseas arrivals and departures data compiled by ABS.
- Estimates of tourism employment have been revised to incorporate updated measures that have become available for some industries for earlier years.
- 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 expected release date of the next issue of this publication is April 2004. For that issue the ABS intends to introduce a full-scale TSA in respect of 2000–01. This will provide a new benchmark for subsequent years until the next full-scale TSA is compiled. It is also likely to lead to revisions to the estimates for the years prior to 2000–01. This is explained further in the Introduction.

Dennis Trewin
Australian Statistician

ABBREVIATIONS

ABS	Australian Bureau of Statistics
ANZSCC	Australian and New Zealand Standard Commodity Classification
ANZSIC	Australian and New Zealand Standard Industrial Classification
BTR	Bureau of Tourism Research
DITR	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
TSA	Tourism Satellite Account
UN	United Nations
WTO	World Tourism Organisation

INTRODUCTION

INTRODUCTION

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

The TSA is compiled using a combination of visitor expenditure data from surveys conducted by the Bureau of Tourism Research, industry data from ABS collections and supply-use relationships in the Australian system of national accounts supply and use tables. Because the required industry collections are not conducted annually, the compilation strategy is to produce a full-scale TSA 'benchmark' in those years coinciding with the availability of the industry collections (about every three years) and to extrapolate key results to other years using annual visitor expenditure data and the industry coefficients established in the latest benchmark year. The updates published in this issue have been extrapolated in this manner. Subject to the continuing availability of external funding, the next complete update of the TSA is expected to be for the financial year 2000–01, planned for release in April 2004. At this time the extrapolations will be readjusted to the new benchmark.

The emphasis in the TSA is on the measurement of tourism consumption and the size of the tourism industry, including its contribution to GDP and employment. It puts tourism on a similar footing to other industries in the national accounts. It does not measure the indirect effects of tourism consumption on other industries. This is done using economic modelling. A research paper by the Bureau of Tourism Research *Tourism's Indirect Economic Effects 1997–98* measures these indirect effects using the basic data provided in the TSA 1997–98 and the Australian National Accounts Input-Output tables.

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.

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

ANALYSIS OF RESULTS

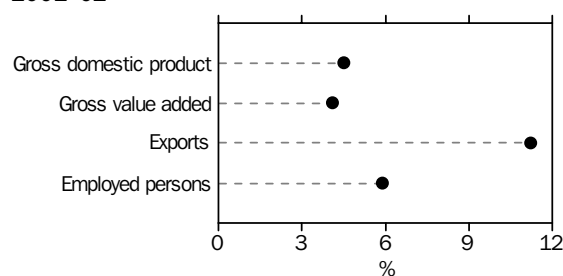
KEY RESULTS

Tourism is not an industry in the traditional sense because industries are classified in accordance with the goods and services that they produce, whereas tourism depends on the status of the customer. A tourism satellite account (TSA) partitions industries into tourism and non-tourism activities so that the direct contribution of tourism to the economy can be measured on a consistent basis with 'traditional' industries. The results presented below relate to the tourism industry in 2001–02 and changes in the magnitude of tourism activity since 1997–98.

Tourism GDP represents the total market value of Australian produced goods and services consumed by visitors after deducting the cost of goods and services used up in the process of production. Tourism accounted for \$31.8 billion of total GDP in 2001–02, a decrease of \$53 million, or 0.2%, since 2000–01. This represents the first annual decrease in tourism GDP since the first TSA was compiled for 1997–98. There is little doubt that the destruction of the World Trade Center in New York on 11 September 2001 and the demise of Ansett Airlines were major factors contributing to the decline. The fall in 2001–02 follows growth of 14.3% in 2000–01, which was influenced by the introduction of the GST and the Sydney Olympic Games.

Volume estimates of the TSA are not compiled, and the growth rates in the current price estimates referred to in this analysis reflect the effects of price change. One way around this problem is to compare the tourism industry's share of GDP and other aggregates over time. The tourism industry share of GDP was 4.5% in 2001–02. This is lower than the 2000–01 share of 4.8%, because while tourism GDP decreased marginally during 2001–02, GDP for the whole economy grew by 6.5%.

TOURISM'S SHARE OF THE AUSTRALIAN ECONOMY—
2001–02



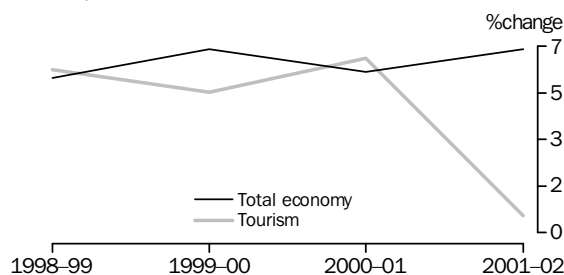
Industry gross value added measures the value of production exclusive of product taxes such as the GST. It is the preferred national accounts measure of the production of industries because it is free from distortions in prices caused by changes in tax rates or the introduction of new taxes over time. The tourism industry share of total industry gross value added for 2001–02 was 4.1% after being steady at 4.3% for all years, except 1998–99 when it was 4.4%.

Tourism industry gross value added grew by 0.6% in 2001–02, while the growth for the whole economy was 6.5%.

ANALYSIS OF RESULTS *continued*

KEY RESULTS *continued*

GROWTH IN INDUSTRY GROSS VALUE ADDED, Current prices



Tourism also contributes significantly to employment and Australia's exports. In 2001-02 the tourism industry's share of total employment dropped slightly to 5.9%, after remaining at 6.0% since 1997-98. Tourism contributed 11.2% of total exports of goods and services in 2001-02.

Domestic visitors generated 75.5% of tourism industry GDP in 2001-02 while international visitors generated 24.5%.

TOURISM INDUSTRY GROSS VALUE ADDED

In 2001-02, the industries which accounted for the largest share of tourism gross value added were Air and water transport (14%), Accommodation (11%), Cafes, restaurant and takeaway food outlets (10%), and Other retail trade (9%).

TOURISM GROSS VALUE ADDED, By selected industries

	1997-98		2001-02	
	<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
Air & water transport	3 235	14.5	3 750	14.2
Accommodation	2 388	10.7	2 929	11.1
Cafes, restaurants & takeaway food outlets	2 207	9.9	2 572	9.7
Other retail trade	1 970	8.8	2 270	8.6
All other industries	12 588	56.2	14 961	56.5
Total	22 389	100.0	26 483	100.0

COMPARISON WITH 'NON-TOURISM' INDUSTRIES

Tourism contributed \$26.5 billion to industry gross value added in 2001-02. When compared with the traditional seventeen *Australian and New Zealand Standard Industrial Classification* (ANZSIC) industry divisions the gross value added of the tourism industry ranks twelfth. Tourism gross value added exceeded that of Agriculture, forestry and fishing, Communication services, Personal and other services, Electricity, gas and water supply, Accommodation, cafes and restaurants, and Cultural and recreational services.

TOURISM CONSUMPTION

Tourism consumption decreased slightly from \$71.3 billion to \$70.8 billion between 2000-01 and 2001-02. This was the first decrease in tourism consumption since 1997-98.

ANALYSIS OF RESULTS *continued*

TOURISM CONSUMPTION

continued

The international visitor share of tourism consumption was 24.1% in 2001–02. Of the remainder, domestic households accounted for 64.3% and domestic business/government visitors accounted for 11.6%.

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

In 2001–02 Long distance passenger transportation represented the largest proportion of tourism consumption at 17%, followed by Shopping, including gifts and souvenirs, and Takeaway and restaurant meals (15%) and then Accommodation services (10%).

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

SHARE OF TOURISM CONSUMPTION, Selected tourism products—By type of visitor—2001–02

	Households	Business/ government	International	All visitors
	%	%	%	%
Long distance passenger transportation	9.1	38.7	29.0	17.3
Shopping (including gifts & souvenirs)	18.9	0.3	13.6	15.5
Takeaway & restaurant meals	19.5	7.0	7.0	15.1
Accommodation services	5.8	22.9	13.7	9.7
Food products	9.5	0.6	6.6	7.8
Fuel (petrol, diesel)	8.2	14.0	1.1	7.1
Taxi products	0.4	3.3	0.7	0.8
All other tourism products	28.6	13.2	28.4	26.7
Total	100.0	100.0	100.0	100.0

Tourism consumption decreased slightly across all sectors during 2001–02. Tourism consumption by households went from \$45.9 billion to \$45.5 billion, while that for domestic business/government fell marginally to \$8.2 billion. International visitor consumption also decreased slightly to be \$17.1 billion.

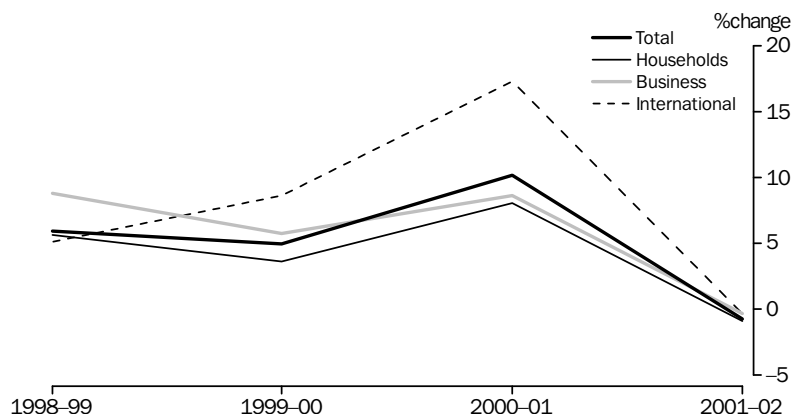
Since 1997–98 tourism consumption has grown annually up to 2000–01 with 2000–01 showing strong growth of 10%. This growth for 2000–01 mainly reflects the impact of the GST on prices paid. Growth in domestic tourism was strongest in services, which attracted GST for the first time. Also, Recreation, culture and sporting services were particularly boosted by expenditure on tickets for the Olympics.

ANALYSIS OF RESULTS *continued*

TOURISM CONSUMPTION

continued

GROWTH IN TOURISM CONSUMPTION



INTERNATIONAL TRADE IN TOURISM

Tourism makes an important contribution to Australia's export earnings. In 2001-02, international visitors consumed \$17.1 billion worth of goods and services produced by the Australian economy. This represented 11.2% of the total exports of goods and services. While tourism exports grew quite strongly between 1997-98 and 2000-01, so did exports of other goods and services. However both tourism exports and total exports declined in 2001-02.

EXPORTS OF TOURISM GOODS AND SERVICES

	1997-98	1998-99	1999-00	2000-01	2001-02
International visitor consumption (\$m)	12 792	13 446	14 611	17 140	17 080
Total exports (\$m)	113 744	112 025	126 034	153 511	152 357
Tourism share of exports (%)	11.2	12.0	11.6	11.2	11.2
Growth in international visitor consumption (%)	..	5.1	8.7	17.3	-0.3
Growth in total exports (%)	..	-1.5	12.5	21.8	-0.8

.. not applicable

Exports of tourism goods and services compare favourably with other Australian '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
	%	%	%	%	%
Coal	8.4	8.3	6.6	7.1	8.8
Iron, steel, non-ferrous metals	6.3	6.2	7.0	6.6	6.3
Food and live animals	14.1	13.8	13.4	13.5	14.7
Tourism products	11.2	12.0	11.6	11.2	11.2

TOURISM EMPLOYED PERSONS

The tourism industry employed 549,000 persons in 2001-02, a marginal decrease on 2000-01. While the tourism share of total employed persons remained constant at 6.0% in each year from 1997-98, in 2001-02 this share decreased slightly to 5.9%.

ANALYSIS OF RESULTS *continued*

TOURISM EMPLOYED PERSONS *continued*

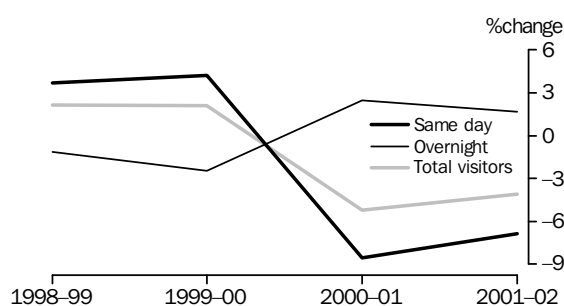
The tourism share of total employment is higher than the tourism share of industry gross value added. This is because tourism tends to be more labour intensive, on average, than other forms of economic activity. While the tourism share of employment has decreased marginally in 2001–02, the tourism share of gross value added has also decreased.

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

VISITOR NUMBERS

Domestic visitor numbers declined in 2001–02 by 4%. This was the second year of decrease since they peaked in 1999–2000. The decrease is due entirely to a decline in same day visitors of 7%, with the number of overnight visitors increasing by 2%.

GROWTH IN DOMESTIC VISITOR NUMBERS



Short-term international visitor arrivals to Australia peaked at over 5 million in 2000–01, but declined during 2001–02 by 5%, reflecting the combined impact of the post Olympic period, world terrorism events and the demise of Ansett Airlines.

GROWTH IN INTERNATIONAL VISITOR NUMBERS



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TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT

	1997-98	1998-99	1999-2000	2000-01(a)	2001-02
TOURISM GROSS DOMESTIC PRODUCT AND ASSOCIATED STATISTICS					
Tourism gross value added at basic prices (\$m)	22 389	23 667	24 819	26 325	26 483
plus Net taxes on tourism products (\$m)	2 785	2 945	3 050	5 528	5 318
equals tourism GDP (\$m)	25 174	26 613	27 868	31 854	31 801
Gross domestic product (\$m)	561 229	591 917	628 621	669 307	712 822
Tourism share of gross value added^(b) (%)	4.3	4.4	4.3	4.3	4.1
Tourism share of gross domestic product^(b) (%)	4.5	4.5	4.4	4.8	4.5
PERCENTAGE CHANGES (c)					
Tourism gross value added at basic prices (%)	. .	5.7	4.9	6.1	0.6
Net taxes on tourism products (%)	. .	5.8	3.5	81.3	-3.8
Tourism GDP (%)	. .	5.7	4.7	14.3	-0.2
Gross domestic product (%)	. .	5.5	6.2	6.5	6.5
. .	not applicable				
(a)	Estimates for 2000-01 have been revised (see Appendix 1).				
(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	1999-2000	2000-01	2001-02
TOURISM INDUSTRY GDP (\$M)					
Domestic					
Households	17 026	17 986	18 569	20 888	20 735
Business/government	2 755	2 941	3 086	3 284	3 291
<i>Total domestic</i>	<i>19 781</i>	<i>20 928</i>	<i>21 656</i>	<i>24 171</i>	<i>24 025</i>
International	5 394	5 685	6 212	r7 683	7 776
<i>Total</i>	<i>25 174</i>	<i>26 613</i>	<i>27 868</i>	<i>31 854</i>	<i>31 801</i>
SHARE OF TOURISM INDUSTRY GDP (%)					
Domestic					
Households	67.6	67.6	66.6	65.6	65.2
Business/government	10.9	11.1	11.1	10.3	10.3
<i>Total domestic</i>	<i>78.6</i>	<i>78.6</i>	<i>77.7</i>	<i>75.9</i>	<i>75.5</i>
International	21.4	21.4	22.3	r24.1	24.5
<i>Total</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>
TOURISM INDUSTRY SHARE OF GDP (%)					
Domestic					
Households	3.0	3.0	3.0	3.1	2.9
Business/government	0.5	0.5	0.5	0.5	0.5
<i>Total domestic</i>	<i>3.5</i>	<i>3.5</i>	<i>3.4</i>	<i>3.6</i>	<i>3.4</i>
International	1.0	1.0	1.0	r1.1	1.1
<i>Total</i>	<i>4.5</i>	<i>4.5</i>	<i>4.4</i>	<i>4.8</i>	<i>4.5</i>

r revised

TOURISM INDUSTRY OUTPUT AT BASIC PRICES

	1997-98	1998-99	1999-2000	2000-01(a)	2001-02
	\$m	\$m	\$m	\$m	\$m
.....					
Tourism characteristic industries					
Travel agency and tour operator services	1 895	1 972	2 080	2 234	2 179
Taxi transport	445	501	506	555	530
Air and water transport	9 513	9 951	10 448	11 493	11 033
Motor vehicle hiring	712	800	864	862	825
Accommodation	5 542	5 890	6 104	6 460	6 760
Cafes, restaurants and food outlets	5 571	6 110	6 188	6 301	6 485
<i>Total tourism characteristic industries</i>	<i>23 677</i>	<i>25 224</i>	<i>26 189</i>	<i>27 905</i>	<i>27 812</i>
Tourism connected industries					
Clubs, pubs, taverns and bars	3 003	3 287	3 348	3 406	3 507
Other road transport	1 436	1 512	1 612	1 669	1 711
Rail transport	710	739	774	820	870
Food manufacturing	2 531	2 798	2 947	3 098	3 007
Beverage manufacturing	1 182	1 330	1 296	1 442	1 485
Transport equipment manufacturing	514	628	626	634	679
Other manufacturing	4 055	3 896	4 113	4 629	4 194
Automotive fuel retailing	280	284	302	327	326
Other retail trade	4 104	4 142	4 417	4 760	4 729
Casinos and other gambling services	253	289	299	280	290
Libraries, museums and arts	654	685	658	745	718
Other entertainment services	1 315	1 393	1 340	1 527	1 469
Education	853	1 027	1 187	1 313	1 493
Ownership of dwellings	1 527	1 645	1 746	1 859	1 987
<i>Total tourism connected industries</i>	<i>22 418</i>	<i>23 654</i>	<i>24 663</i>	<i>26 511</i>	<i>26 466</i>
All other industries	6 377	6 612	7 057	7 039	7 044
Total	52 473	55 491	57 910	61 455	61 322

(a) Estimates for 2000-01 have been revised (see Appendix 1).

TOURISM INDUSTRY GROSS VALUE ADDED

	1997-98	1998-99	1999-2000	2000-01(a)	2001-02
	\$m	\$m	\$m	\$m	\$m
.....					
Tourism characteristic industries					
Travel agency and tour operator services	835	869	895	984	960
Taxi transport	174	195	197	217	207
Air and water transport	3 235	3 383	3 551	3 912	3 750
Motor vehicle hiring	231	259	280	279	267
Accommodation	2 388	2 552	2 644	2 799	2 929
Cafes, restaurants and food outlets	2 207	2 363	2 454	2 499	2 572
<i>Total tourism characteristic industries</i>	<i>9 070</i>	<i>9 621</i>	<i>10 023</i>	<i>10 690</i>	<i>10 685</i>
Tourism connected industries					
Clubs, pubs, taverns and bars	1 072	1 172	1 194	1 215	1 250
Other road transport	619	651	694	719	737
Rail transport	379	395	414	438	465
Food manufacturing	638	706	743	781	758
Beverage manufacturing	391	441	429	478	492
Transport equipment manufacturing	180	219	219	222	237
Other manufacturing	1 363	1 309	1 382	1 555	1 409
Automotive fuel retailing	154	157	166	180	180
Other retail trade	1 970	1 989	2 121	2 286	2 270
Casinos and other gambling services	158	180	186	175	181
Libraries, museums and arts	366	384	368	418	402
Other entertainment services	631	668	643	733	705
Education	756	910	1 052	1 164	1 323
Ownership of dwellings	1 323	1 426	1 513	1 611	1 722
<i>Total tourism connected industries</i>	<i>10 002</i>	<i>10 606</i>	<i>11 124</i>	<i>11 973</i>	<i>12 133</i>
All other industries	3 318	3 440	3 672	3 662	3 665
<i>Total</i>	<i>22 389</i>	<i>23 667</i>	<i>24 819</i>	<i>26 325</i>	<i>26 483</i>
Net taxes on tourism products	2 785	2 945	3 050	5 528	5 318
Tourism GDP	25 174	26 613	27 868	31 854	31 801
.....					

(a) Estimates for 2000-01 have been revised (see Appendix 1).

GROSS VALUE ADDED, By industry division

	1997-98	1998-99	1999-2000	2000-01	2001-02
	\$m	\$m	\$m	\$m	\$m
Agriculture, forestry and fishing	17 294	18 146	20 282	21 618	24 767
Mining	24 585	24 258	26 708	33 975	34 192
Manufacturing	69 881	70 025	71 541	73 354	76 137
Electricity, gas and water supply	13 747	14 152	14 559	15 351	16 005
Construction	31 187	34 238	38 521	34 927	39 943
Wholesale trade	28 879	30 746	32 211	33 509	36 629
Retail trade	29 977	31 538	33 009	32 851	35 910
Accommodation, cafes and restaurants	12 051	13 237	14 332	14 744	15 186
Transport and storage	28 811	30 753	31 080	32 318	33 699
Communication services	17 157	18 087	18 129	19 236	19 412
Finance and insurance	33 829	35 389	40 773	44 867	49 437
Property and business services	55 273	61 073	66 589	73 556	75 238
Government administration and defence	22 308	23 544	23 850	25 183	27 773
Education	25 225	26 750	27 700	29 861	32 420
Health and community services	31 167	33 191	34 999	38 229	41 353
Cultural and recreational services	9 712	10 156	10 726	11 782	12 479
Personal and other services	12 151	12 981	14 536	14 713	16 217
Ownership of dwellings(a)	51 600	54 567	58 160	60 085	62 167
Total gross value added at basic prices	514 834	542 831	577 705	610 159	648 964
of which Tourism	22 389	23 667	24 819	26 325	26 483

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

Source: Australian System of National Accounts, 2001-02 (cat. no 5204.0).

TOURISM CONSUMPTION, By type of visitor

	1997-98	1998-99	1999-2000	2000-01	2001-02
	\$m	\$m	\$m	\$m	\$m
DOMESTIC HOUSEHOLDS (a)					
Tourism characteristic products					
Travel agency and tour operator services	1 178	1 206	1 261	1 353	1 332
Taxi fares	140	166	151	176	164
Long distance passenger transportation	3 730	3 950	4 104	4 277	4 126
Motor vehicle hire and lease	268	304	332	360	331
Accommodation services	2 159	2 286	2 307	2 587	2 642
Takeaway and restaurant meals(b)	7 193	7 874	7 890	8 607	8 888
Shopping (including gifts and souvenirs)	7 348	7 348	7 977	8 705	8 618
<i>Total tourism characteristic products</i>	<i>22 016</i>	<i>23 133</i>	<i>24 022</i>	<i>26 064</i>	<i>26 101</i>
Tourism connected products					
Local area passenger transportation	151	158	150	159	164
Repair and maintenance of motor vehicles	450	375	443	416	329
Fuel (petrol,diesel)	3 181	3 360	3 641	4 156	3 710
Food products	3 759	4 037	4 201	4 409	4 335
Alcoholic beverages and other beverages	2 248	2 541	2 515	2 713	2 777
Motor vehicles, caravans, boats, etc	912	1 053	1 041	1 025	1 060
Recreational, cultural and sports services	1 733	1 815	1 704	2 127	2 047
Gambling and betting services	494	559	602	652	688
Education	76	89	91	91	90
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688
<i>Total tourism connected products</i>	<i>14 300</i>	<i>15 384</i>	<i>15 868</i>	<i>17 321</i>	<i>16 887</i>
Other tourism connected products	2 453	2 457	2 567	2 487	2 488
<i>Total</i>	<i>38 770</i>	<i>40 974</i>	<i>42 457</i>	<i>45 872</i>	<i>45 477</i>
DOMESTIC BUSINESS/GOVERNMENT (a)					
Tourism characteristic products					
Travel agency and tour operator services	471	506	531	559	551
Taxi fares	200	238	249	290	271
Long distance passenger transportation	2 748	2 896	3 103	3 274	3 181
Motor vehicle hire and lease	278	324	341	342	327
Accommodation services	1 517	1 615	1 628	1 736	1 877
Takeaway and restaurant meals(b)	407	497	496	551	578
Shopping (including gifts and souvenirs)	12	15	21	22	21
<i>Total tourism characteristic products</i>	<i>5 632</i>	<i>6 092</i>	<i>6 368</i>	<i>6 775</i>	<i>6 807</i>
Tourism connected products					
Local area passenger transportation	4	5	5	7	8
Repair and maintenance of motor vehicles	23	27	30	34	35
Fuel (petrol,diesel)	748	845	967	1 210	1 151
Food products	45	52	56	52	51
Alcoholic beverages and other beverages	41	47	55	58	58
Motor vehicles, caravans, boats, etc	—	—	—	—	—
Recreational, cultural and sports services	1	1	1	1	1
Gambling and betting services	—	—	—	—	—
Education	41	45	43	44	43
Actual and imputed rent on holiday houses	—	—	—	—	—
<i>Total tourism connected products</i>	<i>902</i>	<i>1 021</i>	<i>1 157</i>	<i>1 406</i>	<i>1 348</i>
Other tourism connected products	62	63	62	60	59
<i>Total</i>	<i>6 596</i>	<i>7 176</i>	<i>7 587</i>	<i>8 241</i>	<i>8 214</i>
— nil or rounded to zero (including null cells) (b) Includes all beverages bought and consumed in (a) Includes expenditure by outbound Australian residents before/after international trips. licensed restaurants, cafes, clubs, pubs, taverns and bars.					

TOURISM CONSUMPTION, By type of visitor *continued*

	1997-98	1998-99	1999-2000	2000-01	2001-02
	\$m	\$m	\$m	\$m	\$m
INTERNATIONAL					
Tourism characteristic products					
Travel agency and tour operator services	246	261	288	359	335
Taxi fares	100	92	101	111	111
Long distance passenger transportation	3 918	4 054	4 278	5 269	4 948
Motor vehicle hire and lease	173	181	201	224	227
Accommodation services	1 560	1 678	1 868	2 212	2 333
Takeaway and restaurant meals(a)	819	865	967	1 209	1 202
Shopping (including gifts and souvenirs)	2 011	2 059	2 097	2 377	2 318
<i>Total tourism characteristic products</i>	<i>8 828</i>	<i>9 191</i>	<i>9 799</i>	<i>11 761</i>	<i>11 475</i>
Tourism connected products					
Local area passenger transportation	163	158	171	199	191
Repair and maintenance of motor vehicles	18	21	20	18	20
Fuel (petrol,diesel)	139	151	182	219	195
Food products	779	831	931	1 104	1 119
Alcoholic beverages and other beverages	361	392	442	534	535
Motor vehicles, caravans, boats, etc	97	104	110	134	157
Recreational, cultural and sports services	221	253	286	373	348
Gambling and betting services	209	235	225	185	169
Education	801	972	1 143	1 281	1 475
Actual and imputed rent on holiday houses	230	248	263	285	299
<i>Total tourism connected products</i>	<i>3 017</i>	<i>3 364</i>	<i>3 772</i>	<i>4 331</i>	<i>4 508</i>
Other tourism connected products	948	891	1 039	1 048	1 097
<i>Total</i>	<i>12 792</i>	<i>13 446</i>	<i>14 611</i>	<i>17 140</i>	<i>17 080</i>
TOTAL					
Tourism characteristic products					
Travel agency and tour operator services	1 895	1 972	2 080	2 272	2 219
Taxi fares	440	496	501	576	547
Long distance passenger transportation	10 395	10 901	11 486	12 820	12 255
Motor vehicle hire and lease	720	809	874	925	885
Accommodation services	5 237	5 579	5 803	6 536	6 853
Takeaway and restaurant meals(a)	8 419	9 236	9 352	10 367	10 668
Shopping (including gifts and souvenirs)	9 370	9 423	10 094	11 104	10 957
<i>Total tourism characteristic products</i>	<i>36 476</i>	<i>38 415</i>	<i>40 189</i>	<i>44 601</i>	<i>44 384</i>
Tourism connected products					
Local area passenger transportation	318	321	326	365	363
Repair and maintenance of motor vehicles	491	422	493	467	384
Fuel (petrol,diesel)	4 068	4 356	4 790	5 584	5 056
Food products	4 582	4 920	5 187	5 565	5 505
Alcoholic beverages and other beverages	2 650	2 980	3 011	3 305	3 370
Motor vehicles, caravans, boats, etc	1 009	1 157	1 151	1 158	1 216
Recreational, cultural and sports services	1 954	2 069	1 990	2 501	2 396
Gambling and betting services	703	794	826	838	858
Education	918	1 106	1 277	1 416	1 607
Actual and imputed rent on holiday houses	1 527	1 645	1 746	1 859	1 987
<i>Total tourism connected products</i>	<i>18 219</i>	<i>19 770</i>	<i>20 798</i>	<i>23 058</i>	<i>22 743</i>
Other tourism connected products	3 463	3 411	3 668	3 597	3 644
<i>Total</i>	<i>58 158</i>	<i>61 596</i>	<i>64 655</i>	<i>71 254</i>	<i>70 771</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	1999-2000	2000-01	2001-02
	\$m	\$m	\$m	\$m	\$m
SAME DAY					
Tourism characteristic products					
Travel agency and tour operator services	4	5	6	6	5
Taxi fares	32	40	44	52	42
Long distance passenger transportation	409	371	419	498	411
Motor vehicle hire and lease	44	45	52	52	32
Accommodation services	—	—	—	—	—
Takeaway and restaurant meals(a)	1 739	2 032	2 096	2 153	2 134
Shopping (including gifts and souvenirs)	3 338	3 109	3 546	3 779	3 593
<i>Total tourism characteristic products</i>	<i>5 567</i>	<i>5 602</i>	<i>6 162</i>	<i>6 540</i>	<i>6 217</i>
Tourism connected products					
Local area passenger transportation	47	46	63	55	59
Repair and maintenance of motor vehicles	97	127	168	121	137
Fuel (petrol,diesel)	1 512	1 695	1 984	2 033	1 790
Food products	1 013	1 151	1 343	1 187	1 063
Alcoholic beverages and other beverages	496	538	583	546	510
Motor vehicles, caravans, boats, etc	474	545	540	532	550
Recreational, cultural and sports services	383	422	367	503	448
Gambling and betting services	140	212	228	247	261
Education	54	47	60	60	59
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>
Other tourism connected products	863	834	910	813	702
<i>Total</i>	<i>10 646</i>	<i>11 221</i>	<i>12 407</i>	<i>12 636</i>	<i>11 796</i>
OVERNIGHT (b)					
Tourism characteristic products					
Travel agency and tour operator services	1 645	1 706	1 786	1 906	1 878
Taxi fares	307	364	356	413	393
Long distance passenger transportation	6 068	6 476	6 789	7 053	6 896
Motor vehicle hire and lease	503	583	621	650	626
Accommodation services	3 677	3 900	3 935	4 324	4 520
Takeaway and restaurant meals(a)	5 861	6 338	6 290	7 005	7 332
Shopping (including gifts and souvenirs)	4 021	4 254	4 451	4 948	5 046
<i>Total tourism characteristic products</i>	<i>22 082</i>	<i>23 623</i>	<i>24 228</i>	<i>26 299</i>	<i>26 692</i>
Tourism connected products					
Local area passenger transportation	107	117	93	112	112
Repair and maintenance of motor vehicles	375	274	305	329	227
Fuel (petrol,diesel)	2 416	2 510	2 624	3 333	3 071
Food products	2 790	2 938	2 914	3 275	3 323
Alcoholic beverages and other beverages	1 793	2 050	1 986	2 225	2 325
Motor vehicles, caravans, boats, etc	438	507	501	493	510
Recreational, cultural and sports services	1 351	1 393	1 338	1 626	1 600
Gambling and betting services	355	347	374	405	427
Education	63	86	74	75	74
Actual and imputed rent on holiday houses	1 297	1 398	1 483	1 573	1 688
<i>Total tourism connected products</i>	<i>10 985</i>	<i>11 621</i>	<i>11 690</i>	<i>13 444</i>	<i>13 358</i>
Other tourism connected products	1 653	1 685	1 719	1 734	1 845
<i>Total</i>	<i>34 720</i>	<i>36 929</i>	<i>37 637</i>	<i>41 478</i>	<i>41 895</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.					

TOURISM CONSUMPTION, By Australian residents—outbound trips

	1997-98	1998-99	1999-2000	2000-01	2001-02
Domestically produced goods and services (\$m)	2 349	2 413	2 630	2 952	2 647
Imports of tourism goods and services					
Purchased by businesses (\$m)	3 222	3 110	3 505	3 922	3 747
Purchased by households (\$m)	8 031	9 091	9 851	10 804	10 961
Total (\$m)	11 253	12 201	13 356	14 726	14 707
Total consumption by Australian residents on outbound trips (\$m)	13 602	14 614	15 987	17 678	17 354
Average consumption by Australian residents on outbound trips (\$)	4 486	4 583	4 797	4 942	5 153

r revised

TOURISM CONSUMPTION, By non-residents—inbound trips

	1997-98	1998-99	1999-2000	2000-01(a)	2001-02
Overseas produced goods and services (\$m)	3 861	3 804	4 143	4 897	4 934
Exports of tourism goods and services					
Purchased by businesses (\$m)	1 357	1 136	1 156	1 301	1 238
Purchased by households (\$m)	11 435	12 310	13 454	15 840	15 842
Total(b) (\$m)	12 792	13 446	14 611	17 140	17 080
Total consumption by non-residents on inbound trips (\$m)	16 654	17 250	18 754	22 037	22 015
Average consumption by non-residents on inbound trips (\$)	3 946	4 023	4 032	4 380	4 617

(a) Estimates for 2000-01 have been revised (see Appendix 1).

(b) There are some conceptual differences between exports of goods and services and exports of transport and travel services in the

Balance of Payments and International Investment Position, Australia (cat. no. 5302.0).

TOURISM EMPLOYED PERSONS(a), By industry

	1997-98	1998-99	1999-2000	2000-01	2001-02
Tourism characteristic and connected industries(b)					
Travel agency and tour operator services ('000)	24.9	25.5	24.0	23.7	23.6
Road transport and motor vehicle hiring ('000)	22.2	22.5	22.3	23.3	24.2
Air and water transport ('000)	30.6	31.4	33.0	36.0	34.7
Accommodation ('000)	91.8	91.2	96.1	99.0	96.1
Cafes and restaurants ('000)	43.9	44.8	47.2	50.9	52.5
Clubs, pubs, taverns and bars(c) ('000)	26.2	26.1	26.9	27.5	26.3
Rail transport ('000)	3.8	3.8	3.4	3.7	3.1
Manufacturing ('000)	38.2	37.2	38.3	38.8	37.8
Retail trade ('000)	135.8	140.1	142.9	143.6	145.4
Casinos and other gambling services(c) ('000)	2.5	2.1	2.2	2.3	2.2
Libraries, museums and arts ('000)	8.2	9.1	8.7	11.0	10.7
Other entertainment services ('000)	14.3	14.9	15.9	15.4	16.9
Education ('000)	17.8	18.2	18.4	18.8	19.5
Tourism characteristic and connected industries ('000)	460.3	467.0	479.3	494.0	493.0
All other industries ('000)	51.5	52.3	54.1	55.3	56.0
Total tourism employed persons(c) ('000)	511.8	519.3	533.4	549.3	549.0
Total employed persons(c) ('000)	8 574.6	8 690.8	8 937.8	9 123.0	9 258.9
Tourism Share of Total Employment (%)	6.0	6.0	6.0	6.0	5.9

(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 3.

(c) These estimates have been revised because of revisions to employer survey estimates for 1997-98.

VISITOR NUMBERS

	1997-98	1998-99	1999-2000	2000-01	2001-02
	'000	'000	'000	'000	'000
Domestic					
Same day	154 581	160 316	167 054	152 765	142 302
Overnight	74 665	73 830	72 017	73 819	75 047
Total	229 246	234 146	239 071	226 584	217 349
International	4 220	4 288	4 652	r5 031	4 768

r revised

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

	1997-98	1998-99	1999-00	2000-01(a)	2001-02
	'000	'000	'000	'000	'000
.....					
Oceania & Antarctica					
New Zealand	695.7	718.9	773.1	828.4	787.7
Other	118.9	136.1	135.6	132.5	119.7
Total	814.6	855.0	908.6	960.9	907.5
Europe & the former USSR					
Germany	130.2	129.8	147.2	147.5	136.8
Italy	46.3	48.5	54.4	54.6	41.1
United Kingdom	445.1	483.1	554.4	605.4	627.1
Other	292.5	322.7	375.7	408.4	367.3
Total	914.1	984.1	1 131.5	1 216.4	1 172.2
Middle East & North Africa					
Total	36.0	46.2	52.6	57.9	56.3
Southeast Asia					
Indonesia	120.0	100.4	83.1	98.3	94.7
Malaysia	124.8	128.1	146.8	148.4	154.3
Singapore	256.9	244.5	277.0	293.3	295.8
Thailand	44.9	59.5	68.0	77.9	80.0
Other	55.6	58.0	59.4	58.7	58.0
Total	602.2	590.5	634.4	676.7	682.7
Northeast Asia					
China (excl. SARs and Taiwan)	71.9	81.6	105.0	143.5	172.3
Hong Kong (SAR of China)	144.3	138.7	149.0	154.1	148.6
Japan	797.0	725.8	705.5	724.2	659.2
Korea	133.2	88.4	139.4	164.6	181.1
Taiwan	154.8	147.3	140.9	124.3	99.1
Other	2.7	3.4	2.9	3.6	2.0
Total	1 303.9	1 185.2	1 242.8	1 314.3	1 262.4
Southern Asia					
Total	40.2	45.9	54.6	63.2	61.4
The Americas					
United States of America	355.7	393.7	436.9	502.1	424.4
Other	94.1	106.4	114.3	142.9	126.8
Total	449.8	500.1	551.1	645.0	551.1
Africa (excluding North Africa)					
Total	58.3	77.8	71.9	73.2	72.7
Not stated	0.9	3.2	4.4	23.7	2.0
Total	4 220.0	4 288.0	4 651.8	5 031.3	4 768.3
.....					

(a) Short-term international visitor arrivals for 2000-01 have been revised.

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
	'000	'000	'000	'000	'000
Oceania & Antarctica					
New Zealand	429.2	477.4	506.7	574.5	592.2
Other	223.6	248.5	270.1	235.8	251.5
Total	652.8	725.9	776.8	810.3	843.7
Europe & the former USSR					
Germany	38.1	39.3	39.5	43.5	43.5
Italy	61.0	66.2	64.7	76.7	70.8
United Kingdom	327.4	306.0	330.2	323.2	308.0
Other	237.6	237.2	268.9	292.9	262.0
Total	664.1	648.7	703.3	736.4	684.8
Middle East & North Africa					
Total	70.0	78.4	76.8	88.3	77.0
Southeast Asia					
Indonesia	324.0	349.0	256.8	294.8	270.9
Malaysia	104.2	111.9	126.3	134.8	109.5
Singapore	115.8	133.8	145.9	153.6	163.2
Thailand	103.8	137.5	147.8	157.7	163.4
Other	115.3	121.9	124.1	156.8	153.8
Total	763.1	854.1	801.0	897.7	860.9
Northeast Asia					
China (excl. SARs and Taiwan)	81.6	81.8	86.3	100.6	121.3
Hong Kong (SAR of China)	142.0	142.7	149.7	156.8	142.0
Japan	56.6	62.0	64.6	67.7	71.6
Korea	17.6	17.3	19.8	23.0	23.9
Taiwan	35.3	32.4	34.9	35.8	35.4
Other	1.6	1.5	1.8	2.4	1.9
Total	334.7	337.7	357.0	386.4	396.1
Southern Asia					
Total	68.1	68.1	77.2	83.6	75.3
The Americas					
United States of America	346.2	323.9	373.7	372.6	276.0
Other	75.9	86.1	94.0	114.5	94.9
Total	422.1	410.0	467.7	487.1	370.8
Africa (excluding North Africa)					
Total	51.0	50.4	57.6	52.9	56.8
Not stated	6.0	15.3	15.0	34.7	2.5
Total	3 031.9	3 188.7	3 332.3	3 577.3	3 367.9

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

APPENDIX 1 CONCEPTS SOURCES AND METHODS

INTRODUCTION

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

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

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

The TSA is funded by the Department of Industry, Tourism and Resources (DITR, formerly the Department of Industry, Science and Resources). The first edition of this publication was released in October 2000 for 1997–98 and was followed by the release of annual estimates to 2000–01 in April 2002.

INTERNATIONAL STANDARDS

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

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

DIRECT AND INDIRECT ECONOMIC IMPACTS

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

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

DIRECT AND INDIRECT ECONOMIC IMPACTS *continued*

Indirect tourism demand is a broader notion that includes the downstream effects of tourism demand. For example, when a visitor buys a meal, indirect tourism demand is generated for the food manufacturer, the transporter, the electricity company, etc., that provide the necessary inputs required to make the meal. To fully measure the indirect effects, account should also be taken of changes in incomes which may feed through to further changes in tourism demand. A full analysis of indirect effects is best done using a general equilibrium model of the economy. The Bureau of Tourism Research (BTR) have used the information in the 1997–98 TSA to calculate the indirect effects of tourism using the standard input-output approach, and the results are reported in *Tourism's Indirect Economic Effects 1997–98*.

CONCEPTS OF TOURISM *Tourism*

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

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

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

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

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

Visitors

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

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

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

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

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

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

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

Visitors continued

- persons who are travelling between two parts of their usual environment.

Usual environment

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

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

Tourism consumption

Tourism consumption is defined as:

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

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

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

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

Tourism gross value added and tourism GDP

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

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

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

Tourism gross value added and tourism GDP continued

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

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

Gross Fixed Capital Formation

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

The services that capital investment provide are captured to the extent that products implicitly include a component to cover the cost of capital. Whilst the purchase of capital by tourism industries is of significant analytical interest in its own right, data of sufficient quality are not available for publication in the Australian TSA.

Classifications

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

Tourism characteristic products are defined in the international TSA standards as those products which represent an important part of tourism consumption, or for which a significant proportion of the sales are to visitors. In the Australian TSA, for a product to be 'characteristic' it must account for at least 10% of total tourism consumption and/or at least 25% of the total output of the product must be consumed by visitors. Tourism characteristic industries are defined as those industries that would either cease to exist in their present form, or would be significantly affected if tourism were to cease. In the Australian TSA, for an industry to be 'characteristic', at least 25% 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.

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

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

Classifications continued

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

TOURISM SATELLITE ACCOUNT FRAMEWORK

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

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

The supply and use tables on which the TSA is based contain 42 industries and 148 products. To derive the TSA, it was necessary to augment the standard supply and use tables. As the objective of the TSA is to focus on tourism related products and the industries that produce them, some disaggregation of the products and industries shown in the standard tables was required. For operational convenience in constructing the TSA, the non-tourism products and industries were compressed, but the details still remain in the underlying supply and use tables.

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

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

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

CALCULATING BENCHMARK TOURISM GROSS VALUE ADDED AND TOURISM GDP

The gross value added for an industry is derived as the gross output for that industry less the intermediate consumption required to produce that output. However, as the tourism industry is defined according to who purchases an industry's output rather than according to the nature of the output itself, tourism consumption is required in order to measure the tourism output of industries.

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

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

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

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

UPDATE METHODOLOGY

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

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

DATA SOURCES

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

Tourism consumption data

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

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

The international visitor consumption total is the sum of the balance of payments transportation and travel services items adjusted for conceptual differences between the TSA and balance of payments. The conceptual differences relate to the restricted coverage in the TSA of student visitors studying in Australia; imputations for non-market services provided to overseas visitors; margins on foreign exchange transactions, and the

Tourism consumption data *continued*

value of products provided to overseas visitors within private households. IVS data provide the detailed product information.

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

The major imputed component in tourism consumption relates to the imputed value in 'actual and imputed rent on holiday houses', where the imputed value of rent refers to the consumption of housing services provided by holiday houses to the owner. The estimate was calculated by multiplying average annual rents by the total number of holiday houses in Australia from the Census of Population and Housing. An imputation for products provided to visitors in private households was derived using indicators from the ABS Household Expenditure Survey and IVS/NVS data. These methods were used for both the benchmark and updated estimates. For the benchmark TSA the imputation for non-market services provided by government utilised data on visitor numbers from *Cultural Trends in Australia: A Statistical Overview* (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 benchmark estimates were extrapolated for the years 1998–99 to 2001–02 using movements in government final consumption expenditure on relevant products for the government imputation, and movements in the number of short term arrivals for the foreign exchange imputation.

Tourism consumption at basic prices (tourism output) has been calculated by removing the net taxes, margins and imports from tourism consumption at purchaser prices. For 1998–99 to 2000–01 this was done using relationships in the supply and use tables for those years. The supply and use table for 2001–02 is not available so the relationships in the 2000–01 supply and use table are extrapolated forward based on changes in demand. In relation to taxes for 2000–01 and 2001–02, a 10% GST was applied to all expenditure by domestic households and international visitors, excluding expenditure on education, health, international airfares, and groceries that are GST exempt. Other product taxes, subsidies, imports and margins were calculated using a variety of sources including government budget reports, balance of payments data, and retail trade data.

At the time of the release of the 2000–01 issue of this publication IVS data for 2000–01 were not available. In this issue the 2000–01 IVS data have been used to revise previously published estimates, and for the first time product details of international visitor consumption for 2000–01 are available.

INDUSTRY DATA

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

The ABS annual business surveys collect data for business income and expense items for all broad industry groups in the economy. These surveys were expanded in 1997–98 to provide extra data for tourism characteristic industries. The ABS Economic Activity Survey, 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. Where no specific industry or product data are available, relativities from the 1994–95 input-output tables have been used.

APPENDIX 1 CONCEPTS SOURCES AND METHODS *continued*

INDUSTRY DATA *continued*

As the TSA supply table has not been updated for the extrapolated years, the benchmark coefficients have been carried through to the update estimates. There is flexibility to change coefficients where there is strong evidence that there has been structural change in tourism related industries or the Australian economy more generally.

EMPLOYMENT

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

Details by industry of employment are collected in the Labour Force Survey 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 Travel agency, Cafes and restaurants, Clubs, pubs, taverns and bars, Casinos and other gambling services, and Air and water transport industries, where employer survey data have been used where available. Employment in these industries has been extrapolated using movements in the labour force survey for the updated years.

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

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

OTHER VISITOR CHARACTERISTICS

Domestic visitors

Domestic visitor numbers are sourced from the NVS. As the survey commenced in January 1998, the visitor numbers for this year have had to be extrapolated to a financial year basis (1997–98). Data from Roy Morgan Research was used to provide this adjustment.

International arrivals and departures

Data on international arrivals and departures (by country of origin or destination) were taken from the ABS publication *Overseas Arrivals and Departures, Australia* (cat. no. 3401.0). Visitor arrivals for 2000–01 have been revised.

QUALITY OF ESTIMATES

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

The estimates have been prepared from a wide range of statistical sources. Some are closely related to the desired national accounting basis, but others are not completely satisfactory in various respects, including coverage, concepts and timing. Many of the tourism industries and products identified in this publication are at a more detailed level, or do not directly concord, with the industry and product details in the national supply

QUALITY OF ESTIMATES

continued

and use tables. While every effort has been made to improve the survey coverage of the finer level tourism industries, the accuracy of these estimates are subject to a higher degree of error than that generally pertaining to the broader level estimates published in the national accounts.

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

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

In the extrapolated years the allocation of tourism gross output to producing industry and the derivation of tourism gross value added are based on relationships that held in the 1997–98 benchmark year. The underlying assumption of this approach is that structural change occurs only slowly. The extrapolation techniques used in the TSA updates may not fully capture structural changes in the tourism industry and the Australian economy. To overcome this deficiency the benchmark coefficients can be altered in the TSA updates where there is strong evidence of structural change in tourism related industries. As the benchmark relationships are likely to become less relevant over time, extrapolated estimates only remain tenable where there is a realignment to periodic benchmarks.

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

APPENDIX 2 TOURISM PRODUCT CONCORDANCE

TOURISM RELATED PRODUCTS

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

TOURISM RELATED PRODUCTS

<i>Characteristic and connected tourism products</i>	ANZSCC code	ANZSCC description
Travel agency and tour operator services	747.10	Travel agency and tour operator services
Taxi fares	712.20	Non-scheduled passenger transportation
Long distance passenger transportation	731.10	Passenger transportation by air
	711.10	Passenger transportation (rail)
	712.10	Scheduled passenger transportation (other land transport)
	721.10	Passenger transportation (water)
Local area passenger transportation	711.10	Passenger transportation (rail)
	712.10	Scheduled passenger transportation (other land transport)
	722.10	Passenger transportation (non-sea going vessels)
Motor vehicle hire and lease	831.11.01	Car hire or rental
Fuel (petrol, diesel)	333.01	Motor spirit (gasoline) (including aviation spirit)
	333.03	Gas oils and fuel oils (excluding motor spirit and kerosene)
Repair and maintenance of motor vehicles	611.03	Maintenance and repair services of motor vehicles
	611.02	Parts and accessories for motor vehicles
Accommodation services	641	Hotel and other lodging services
Actual and imputed rent on dwellings	. .	Imputed rent on second homes used by the owner, rent on second homes to third parties
Takeaway and restaurant meals	642.10.01	Meals sold for consumption on the premises
	642.10.02	Ready to eat takeaway
	642.90	Food serving services n.e.c.
	643.10	Sales of beer, wine and spirits (for consumption on the premises)
	643.90	Beverage serving services for consumption on the premises n.e.c.
Food products	21	Meat, fish, fruit, vegetables, oils and fats
	22	Dairy products (part)
	23	Grain mill products, starches and starch products; 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
	369.15	Tableware, kitchenware, other plastic household articles and toilet articles
	47	Radio, television and communication equipment and apparatus
	385	Games and toys
	384	Sports goods
	322	Books, brochures and leaflets (except advertising material) printed, printed maps; music, printed or in manuscript
	328	Newspapers, journals and periodicals
	353	Soap, cleaning preparations, perfumes and toilet preparations
	382	Jewellery and related articles
	484.1	Watches (including watch movements, watch cases); clocks (including precision instruments, electrically powered types, etc.)
	292.12	Luggage, handbags and the like

. . not applicable

APPENDIX 2 TOURISM PRODUCT CONCORDANCE *continued*

TOURISM RELATED PRODUCTS *continued*

<i>Characteristic and connected tourism products</i>	<i>ANZSCC code</i>	<i>ANZSCC description</i>
Motor vehicles, caravans, boats, etc.	611.01	Sales of motor vehicles and commission on sales of motor vehicles
	492.17	Trailers and semi-trailers of the caravan type, for housing or camping; other trailers and semi-trailers (including trailers and semi-trailers for the transport of goods) (excluding self-loading or self-unloading trailer and semi-trailers)
	494	Pleasure and sporting boats
Recreational, cultural and sporting services	832.90	Leasing or rental services concerning personal and household goods
	963.30	Other cultural services
	963.10	Library and archives services
	963.20	Museum services including preservation services of historical sites and buildings
	964.10	Sporting services
	964.90.9	Other recreational services n.e.c.
	961.20	Motion picture projection services
Gambling and betting services	964.90.1	Gambling and betting services
Education services	92	Education services
Other tourism goods and services	25	Tobacco products
	352	Pharmaceutical products
	931.20	Medical and dental services
	931.10	Hospital services
	931.90	Other human health services
	744.30	Parking services
	752	Telecommunication services
	970.20	Hairdressing and other beauty services
	812.20	Non-life insurance services
	970.10	Washing, cleaning and dyeing services
	875	Photographic services
	911	Administrative services of the government

APPENDIX 3 TOURISM INDUSTRY CONCORDANCE

TOURISM RELATED INDUSTRIES

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

TOURISM RELATED INDUSTRIES

<i>Characteristic and connected tourism products</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>
Travel agency and tour operator services	6 641	Travel agency services
Taxi transport	6 123	Taxi and other road passenger transport
Other road transport	611	Road freight transport
	6 121	Long distance bus transport
	6 122	Short distance bus transport
Rail transport	62	Rail transport
Air and water transport	63	Water transport
	64	Air and space transport
Motor vehicle hiring	7 741	Motor vehicle hiring
Automotive fuel retailing	5 321	Automotive fuel retailing
Accommodation	5 710	Accommodation
Ownwership of dwellings	7 711	Residential property operators
Cafes, restaurants and takeaway food outlets	5 125	Takeaway food retailing
	5 730	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-metalic mineral product manufacturing
	27	Metal product manufacturing
	283	Machinery and equipment manufacturing
	284	Electronic manufacturing
	285	Electrical equipment and appliance manufacturing
	286	Industry machinery and equipment manufacturing
	29	Other manufacturing
Other retail trade	51	Food retailing (except takeaway food retailing (5125))
	52	Personal and household good retailing
	531	Motor vehicle retailing
	5 322	Automotive electrical services
	5 323	Smash repairing
	5 324	Tyre retailing
	5 329	Automotive repair and services nec
Clubs, pubs, taverns and bars	5 720	Pubs, taverns and bars
	5 740	Clubs (hospitality)
Casinos and other gambling services	932	Gambling services
Libraries, museums and arts	92	Libraries, museums and arts

APPENDIX 3 TOURISM INDUSTRY CONCORDANCE *continued*

TOURISM RELATED INDUSTRIES *continued*

<i>Characteristic and connected tourism products</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>
Other entertainment services	91	Motion picture, radio and television services
	931	Sport
	933	Other recreation services
Education	84	Education
All other industries		All other industries

TOURISM RELATED INDUSTRIES FOR EMPLOYMENT ESTIMATES

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

TOURISM EMPLOYMENT INDUSTRIES

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

GLOSSARY

Basic price	The basic price is the amount receivable by the producer from the purchaser for a unit of a good or service produced as output minus any tax payable, and plus any subsidy receivable, on that unit as a consequence of its production or sale. It excludes any transport charges invoiced separately by the producer. Output sold at prices that are not economically significant (see also <i>Economically significant prices</i>) is not valued at these prices. Rather, such output is valued at its cost of production. See also <i>Purchasers' prices</i> .
Consumption by international visitors	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by non-residents on tourism related products, including those sold at prices that are not economically significant. See also <i>Tourism consumption</i> ; <i>Tourism business and government consumption</i> ; <i>Tourism household consumption</i> .
Current prices	Estimates are defined to be in current prices when they are valued at the prices of the period to which the observation relates. For example, estimates for 1998–99 are valued at 1998–99 prices. This contrasts to chain volume measures where the prices used in valuation refer to the prices of the previous year.
Direct tourism demand	A direct economic impact is generated where a direct physical or economic relationship between the visitor and producer of the good or service exists. See also <i>Indirect tourism demand</i> .
Economically significant prices	Prices which have a significant influence on both the amounts the producers are willing to supply and the amounts purchasers wish to buy. See also <i>Basic prices</i> ; <i>Purchasers' prices</i> .
Employed person	Is a person aged 15 years and over who, during the reference week: <ul style="list-style-type: none"> ■ worked for one hour or more for pay, profit, commission or payment in kind in a job or business, or on a farm (comprising employees, employers and own account workers) ■ worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers) ■ were employees who had a job but were not at work and were: on paid leave; on leave without pay for less than four weeks up to the end of the reference week; stood down without pay because of bad weather or plant breakdown at their place of employment for less than four weeks up to the end of the reference week; on strike or locked out; on workers' compensation and expected to be returning to their job; or receiving wages or salary while undertaking full-time study ■ were employers, own account workers or contributing family workers who had a job, business or farm, but were not at work.
Exports of goods and services	The value of goods exported and amounts receivable from non-residents for the provision of services by residents.
Final consumption expenditure—general government	Net expenditure on goods and services by public authorities, other than those classified as public corporations, which does not result in the creation of fixed assets or inventories or in the acquisition of land and existing buildings or second-hand assets. It comprises expenditure on compensation of employees (other than those charged to capital works, etc.), goods and services (other than fixed assets and inventories) and consumption of fixed capital. Expenditure on repair and maintenance of roads is included. Fees and other charges charged by general government bodies for goods sold and services rendered are offset against purchases. Net expenditure overseas by general government bodies and purchases from public corporations are included. Expenditure on defence assets that are used in a fashion similar to civilian assets is classified as gross fixed capital formation; expenditure on weapons of destruction and weapon delivery systems is classified as final consumption expenditure.

GLOSSARY *continued*

Final consumption expenditure—households	Net expenditure on goods and services by persons and expenditure of a current nature by private non-profit institutions serving households. This item excludes expenditures by unincorporated businesses and expenditures on assets by non-profit institutions (included in gross fixed capital formation). Also excluded are maintenance of dwellings (treated as intermediate expenses of private enterprises), but personal expenditure on motor vehicles and other durable goods and the imputed rent of owner-occupied dwellings are included. The value of 'backyard' production (including food produced and consumed on farms) is included in household final consumption expenditure and the payment of wages and salaries in kind (e.g. food and lodging supplied free to employees) is counted in both household income and household final consumption expenditure.
Gross domestic product	The total market value of goods and services produced in Australia within a given period after deducting the cost of goods and services used up in the process of production, but before deducting allowances for the consumption of fixed capital. Thus gross domestic product, as here defined, is 'at market prices'. It is equivalent to gross national expenditure plus exports of goods and services less imports of goods and services.
Gross fixed capital formation	Expenditure on fixed assets—dwellings, other buildings and structures, machinery and equipment, livestock, intangible fixed assets and ownership transfer costs. The machinery and equipment category includes plant, machinery, equipment and vehicles. Expenditure on repair and maintenance of fixed assets is excluded, being chargeable to the production account. Additions to fixed assets are regarded as capital formation. Also included is compensation of employees in connection with own-account capital formation. Expenditure on dwellings, other buildings and structures, and machinery and equipment is measured as expenditure on new and second-hand assets, less sales of existing assets. Ownership transfer costs comprise stamp duty, real estate agents' fees and sales commissions, conveyancing fees and miscellaneous government charges.
Gross value added	The value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries. See also <i>Intermediate consumption</i> ; <i>Output</i> .
Imports of goods and services	The value of goods imported and amounts payable to non-residents for the provision of services to residents.
Indirect tourism demand	Includes downstream effects of tourism expenditure. For example, when a visitor buys a meal, indirect tourism demand is generated for the food manufacturer, the transporter, the electricity company and other businesses, that provide the necessary inputs required to make the meal. To fully measure indirect effects, account should also be taken of the effect of changes in incomes which feed through to further changes in tourism demand. See also <i>direct tourism demand</i> .
Input-output table	An input-output table is a means of presenting a detailed analysis of the process of production and the use of goods and services (products) and the income generated in the production process; they can be either in the form of supply and use tables, or symmetric input-output tables.
Intermediate consumption	Consists of the value of the goods and services consumed as inputs by a process of production, excluding the consumption of fixed capital. See also <i>Gross value added</i> .
Margin	This is the difference between the resale price of a good and the cost to the retailer or wholesaler of the good sold. A transport margin consists of the transport charges paid separately by the purchaser in taking delivery of the good.

GLOSSARY *continued*

Other taxes on production	Consists of all taxes that enterprises incur as a result of engaging in production, except taxes on products. Other taxes on production include: taxes related to the payroll or workforce numbers excluding compulsory social security contributions paid by employers and any taxes paid by the employees themselves out of their wages or salaries; recurrent taxes on land, buildings or other structures; some business and professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions. See also <i>Taxes on production and imports</i> ; and <i>Taxes on products</i> .
Output	Consists of those goods and services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use. See also <i>Gross value added</i> .
Purchasers' price	The purchaser's price is the amount paid by the purchaser, excluding any deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser. The purchaser's price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place. See also <i>Basic prices</i> ; <i>Economically significant prices</i> .
Taxes on production and imports	Consist of 'taxes on products' and 'other taxes on production'. These taxes do not include any taxes on the profits or other income received by an enterprise. They are payable irrespective of the profitability of the production process. They may be payable on the land, fixed assets or labour employed in the production process, or on certain activities or transactions. See also <i>Other taxes on production</i> ; and <i>Taxes on products</i> .
Taxes on products	A tax on a product is payable per unit of some good or service. The tax may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax on a product usually becomes payable when it is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation. See also <i>Other taxes on production</i> ; and <i>Taxes on production and imports</i> .
Tourism	Comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.
Tourism business and government consumption	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by resident businesses or governments, on tourism related products.
Tourism characteristic industries	Are those industries that would either cease to exist in their present form, producing their present product(s), or would be significantly affected if tourism were to cease. In the Australian Tourism Satellite Account, for an industry to be 'characteristic', at least 25% of its output must be consumed by visitors.
Tourism characteristic products	These are defined in the international TSA standards as those products which represent an important part of tourism consumption, or for which a significant proportion of the sales are to visitors. In the Australian TSA, for a product to be 'characteristic' it must account for at least 10 per cent of total tourism consumption and/or at least 25% of the total output of the product must be consumed by visitors.

GLOSSARY *continued*

Tourism connected industries	Are those, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of tourism gross value added and tourism GDP.
Tourism connected products	Are those that are consumed by visitors but are not considered as tourism characteristic products. All other products in the supply and use table not consumed by visitors are classified as 'all other goods and services' in the TSA.
Tourism consumption	Is the total consumption made by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination. See <i>Tourism business and government consumption</i> ; <i>Tourism household consumption</i> ; and <i>Consumption by international visitors</i> .
Tourism GDP	Is tourism gross value added plus taxes paid less subsidies received on tourism related products as these are reflected in prices that visitors actually pay. Tourism GDP will generally have a higher value than tourism value added. Tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While it is useful in this context, the tourism gross value added measure should be used when making comparisons with other industries or between countries. See <i>Tourism gross value added</i> .
Tourism gross value added	Measures the value of tourism gross output at basic prices by all industries which supply tourism products, less the value of the inputs used in producing these tourism products. This measure is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and should also be used for comparisons across countries. See <i>Tourism GDP</i> .
Tourism household consumption	Consists of the visitor expenditure, including imputed expenditure, incurred within Australia by resident households on tourism related products, including those sold at prices that are not economically significant. See <i>Tourism consumption</i> .
Tourism industry ratio	This is the proportion of the total value added of an industry which is related to tourism.
Tourism product ratio	This is the proportion of the total supply of a product which is consumed by visitors.
Usual environment	This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study and other places frequently visited. The usual environment criteria has two dimensions. Frequency means places that are visited on a routine basis (at least once a week) are considered part of a person's usual environment, even if the place visited is located a considerable distance from place of residence. Distance means locations close (up to 40 kilometres from home for overnight trips and up to 50 kilometres from home (round trip) for day trips) to the place of residence of a person are also included in their usual environment.
Visitor	A visitor is defined as 'any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited'.

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