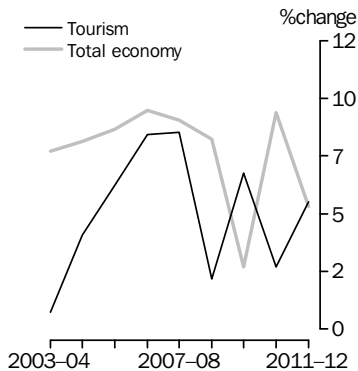


TOURISM SATELLITE ACCOUNT AUSTRALIAN NATIONAL ACCOUNTS

EMBARGO: 11.30AM (CANBERRA TIME) FRI 26 APR 2013

GROWTH IN INDUSTRY

Gross Value Added
Current prices

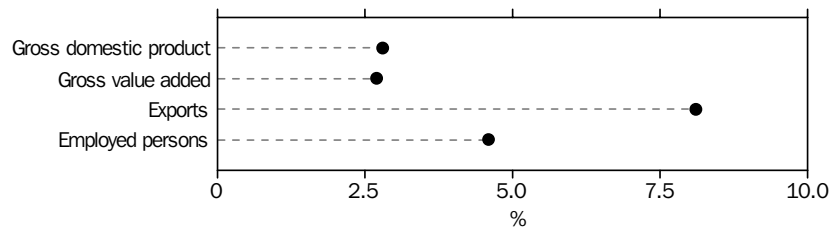


KEY FIGURES

	2010-11	2011-12	2010-11 to 2011-12 change
Direct Tourism gross value added at basic prices (\$m)	35 711	37 621	5.3%
Net taxes on tourism products (\$m)	3 224	3 398	5.4%
Direct tourism GDP (\$m)	38 936	41 018	5.3%
Tourism employed persons ('000)	530.3	531.9	0.3%
Gross value added (\$m)	1 310 364	1 377 036	5.1%
GDP (\$m)	1 403 888	1 473 227	4.9%
Tourism share of gross value added (%)	2.7	2.7	0.0 pts
Tourism share of gross domestic product (%)	2.8	2.8	0.0 pts

KEY POINTS

TOURISM SHARE OF THE AUSTRALIAN ECONOMY



GDP

- Direct tourism GDP increased by 5.3% to \$41,018m, compared with GDP growth of 4.9%
- Tourism share of GDP remained stable at 2.8%

INDUSTRY GROSS VALUE ADDED

- Direct tourism gross value added increased by 5.3% to \$37,621m
- Tourism share of gross value added remained stable at 2.7% in 2011-12

TOURISM CONSUMPTION

- Internal tourism consumption (total domestic and international consumption in Australia) increased by 6.8% to \$106,552m
- Domestic tourism consumption increased by 8.3% to \$81,005m
- Tourism exports (international tourism consumption in Australia) increased by 2.1% to \$25,547m
- Tourism imports (tourism consumption by Australian residents on outbound trips) increased by 5.1% to \$32,282m

TOURISM EMPLOYMENT

- Tourism employed persons increased by approximately 1,600 employees to 531,900 employed persons
- Tourism share of total employment fell marginally from 4.7% to 4.6%

INQUIRIES

For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070 or Sean Thompson on Brisbane (07) 3222 6257.

NOTES

- ABOUT THIS PUBLICATION** This publication presents the key results of the Tourism Satellite Account (TSA) for the years 2003-04 to 2011-12. Work on the TSA has been funded by the Department of Resources, Energy and Tourism (RET). The complete TSA time series from 1997-98 to 2011-12 is available in the data cube associated with this publication on the ABS website.
- CHANGES IN THIS ISSUE** The 2011-12 publication includes new data on tourism employed persons by gender.
- REVISIONS IN THIS ISSUE** The TSA methodology involves estimating a full benchmark every third year. The statistics presented in this publication reflect a new benchmark in respect of 2009-10. See the explanatory notes for a description of the benchmark methodology.
- As part of the 2009-10 benchmark process, the relationships established in 2006-07 have been reviewed and adjusted. Latest industry data and revisions to the supply-use tables have been incorporated, as have revisions to other input data series (see below) which together have resulted in revisions across much of the TSA series:
- Estimates of domestic tourism consumption have been revised following adjustments to Tourism Research Australia's (TRA) National Visitor Survey (NVS) estimates dating back to 2003, first published in the NVS March Quarter 2012. Adjustments include changes to the population benchmark data used from 2007 onwards, and corrections to overnight expenditure for business travellers dating back to 2003.
 - Estimates of international tourism consumption were also revised due to adjustments to Tourism Research Australia's (TRA) International Visitor Survey (IVS). These adjustments, dating back to 1999, were first published in the IVS March Quarter 2012. Implementation of a separate weighting for education and employment purpose-of-visit categories were the main changes.
 - Estimates of Tourism employment have also been revised as a consequence of revisions to the tourism value-added industry ratios and revisions to ABS labour force estimates.
- Upward revisions to direct tourism output, direct tourism gross value added, and direct tourism GDP (from 2002-03 to 2011-12) were an anticipated impact of the revisions to domestic tourism expenditure from the NVS. These were slightly offset by upward revisions to a range of industry supply and value added estimates across the economy, and downward revisions in some years for international tourism expenditure. These revisions, as well as minor changes to total industry employment, also result in changes to tourism employment estimates over the time series.
- 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 2012-13 issue of this publication is expected to be released on 19 December 2013.

Brian Pink
Australian Statistician

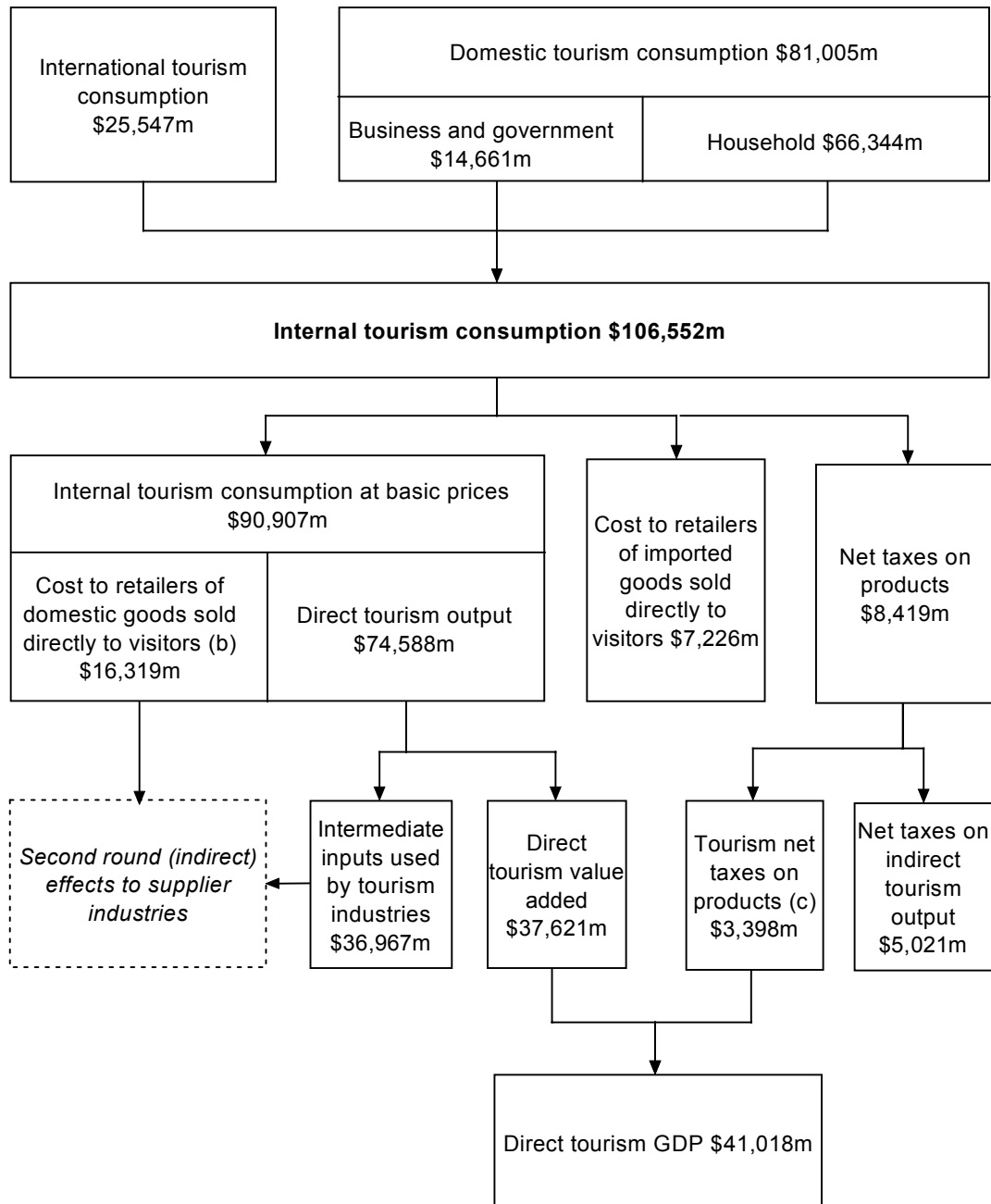
ABBREVIATIONS

'000	thousand
\$m	million dollars
ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
ASNA	Australian System of National Accounts
CPC V2.0	Central Product Classification V2.0
EAS	Economic Activity Survey
Eurostat	Statistical Office of the European Communities
GDP	gross domestic product
GST	goods and services tax
IRTS	International Recommendations for Tourism Statistics
ISIC Rev.4	International Standard Industrial Classification of All Economic Activities, Revision 4 (United Nations)
IVS	International Visitor Survey
LFS	Labour Force Survey
NVS	National Visitor Survey
OECD	Organisation for Economic Co-operation and Development
RET	Department of Resources, Energy and Tourism
SNA08	System of National Accounts 2008 version
TRA	Tourism Research Australia
TSA	Tourism Satellite Account
UNSD	United Nations Statistics Division
UNWTO	United Nations World Tourism Organisation

ANALYSIS OF RESULTS

KEY RESULTS

Flow of Tourism Consumption through the Australian Economy (a) Year ended June 2012



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

(b) Includes wholesale and transport margins supplied domestically.

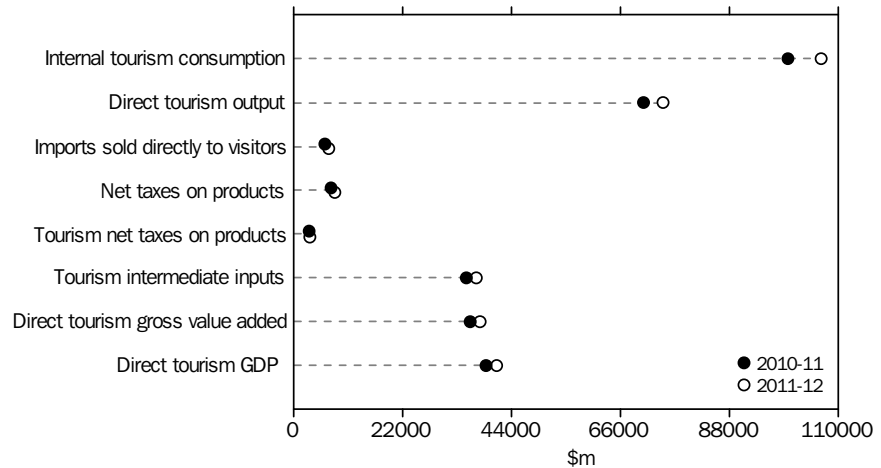
(c) In the case of goods, this will only include the net taxes attributable to retail trade activities.

ANALYSIS OF RESULTS *continued*

KEY RESULTS *continued*

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

SELECTED TOURISM AGGREGATES



Internal tourism consumption is the total value of goods and services consumed by both resident and non-resident visitors within Australia. It is measured in purchasers' prices (the price paid by the tourism consumer). In 2011-12 internal tourism consumption increased by 6.8% from \$99,798m to \$106,552m. The receipts of Australian producers of tourism goods and services exclude product taxes like the Goods and Services Tax (GST) and include subsidies (collectively known as net taxes). In 2011-12 net taxes on tourism products (includes net taxes on indirect tourism output) increased by 9.8% to \$8,419m.

Imported goods and services consumed by visitors are not part of domestic production by Australian industries. The cost to retailers of imported goods sold directly to visitors increased by 13.1% from \$6,389m to \$7,226m in 2011-12. Over the same period, internal tourism consumption at basic prices (internal tourism consumption at purchaser prices less imports and net taxes on tourism products) increased by 6.0% to \$90,907m.

In the case of retail goods purchased by visitors, only the retail margin contributes to direct tourism output, value added and Gross Domestic Product (GDP). This is because it is deemed that only the retailer has a direct relationship with the visitor and is therefore part of the tourism industry. As a consequence the output, and consequently value added, attributed to other (than retail) industries is excluded from the value of direct tourism output. Direct tourism output is therefore equal to internal tourism consumption at basic prices less the cost to retailers of domestic goods sold directly to visitors. In 2011-12, direct tourism output has increased by 5.7% to \$74,588m.

When producing tourism goods and services Australian businesses use goods and services produced and supplied by other businesses. These are known as intermediate inputs and in 2011-12 increased by 6.0% from \$34,859m to \$36,967m.

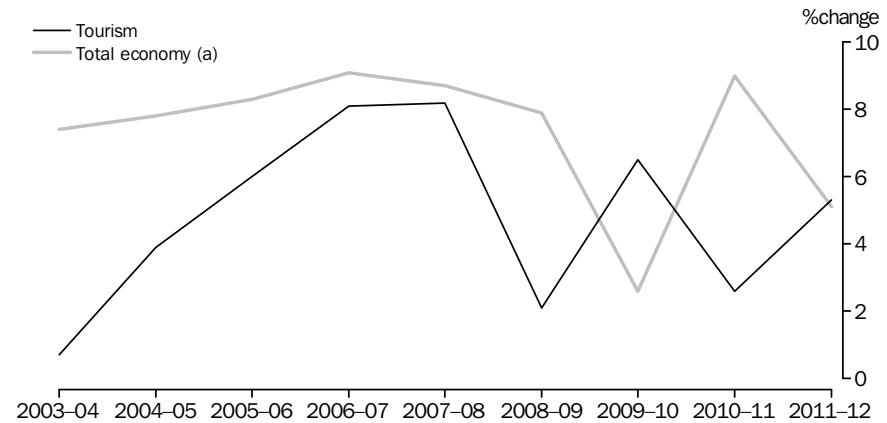
ANALYSIS OF RESULTS *continued*

DIRECT TOURISM GROSS VALUE ADDED

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

Direct tourism gross value added is calculated by subtracting tourism intermediate inputs from direct tourism output at basic prices. In 2011-12 direct tourism gross value added increased by 5.3% to \$37,621m. This was marginally higher than total industry gross value added which increased by 5.1% to \$1,377,036m. Therefore, tourism share of gross value added remained stable at 2.7% in 2011-12. The graph below compares growth in direct tourism gross value added with total industry gross value added over recent years. When comparing tourism to other industries and the total economy, it must be understood that tourism is not a distinct industry, rather it comprises a portion of the economic activity classified to ANZSIC industries in the core national accounts.

GROWTH IN INDUSTRY GROSS VALUE ADDED, CURRENT PRICES



(a) Source: Australian System of National Accounts (cat. no. 5204.0)

DIRECT TOURISM GROSS DOMESTIC PRODUCT (DIRECT TOURISM GDP)

Direct tourism GDP is calculated by adding tourism net taxes on products to direct tourism gross value added. In the case of goods, tourism net taxes on products will only include the net taxes attributable to retail trade activities, consistent with the derivation of other tourism supply measures. In 2011-12 direct tourism GDP increased by 5.3% to \$41,018m, a larger increase than GDP for the Australian economy which grew by 4.9%.

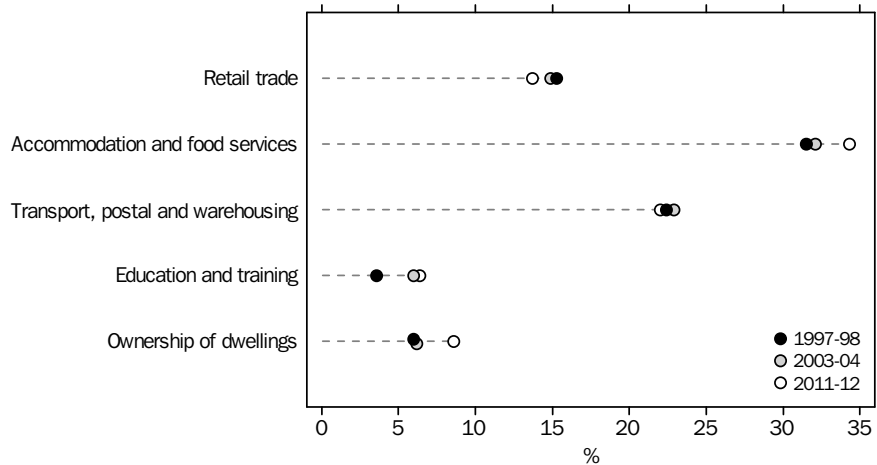
All the aggregates above are presented in current price terms, and so include the effects of price change as well as the volume of tourism activity. Volume estimates of tourism have not been compiled because of conceptual issues involved in deflating the supply side estimates. In the absence of volume estimates, the tourism share of industry GDP is presented. In 2011-12 the tourism share of GDP remained steady at 2.8%. Tourism's share of GDP has declined steadily since a peak of 3.5% in 2000-01. While the peak in 2000-01 was heavily impacted by price increases in tourism services, resulting from the introduction of the GST and the volume impact of the Olympic Games, the overall trend of declining share has continued over a long period.

ANALYSIS OF RESULTS *continued*

COMPONENTS OF TOURISM INDUSTRY GROSS VALUE ADDED

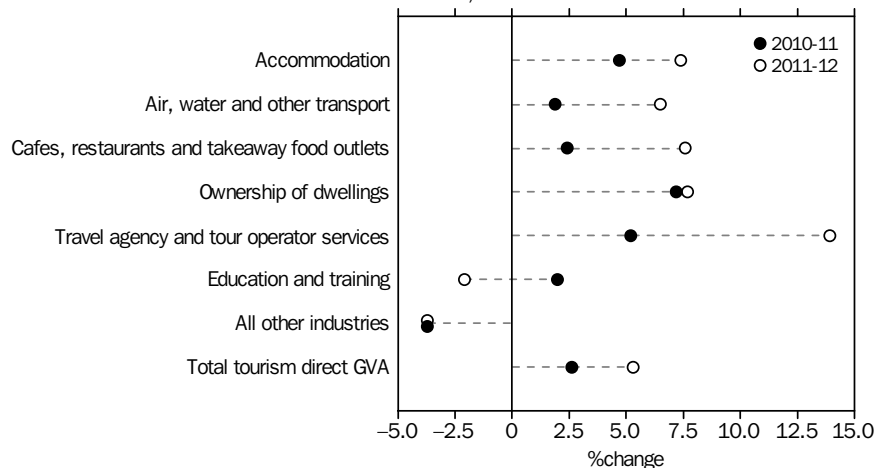
Accommodation, Air, water and other transport, Other retail trade and Cafes, restaurants and takeaway food services continue to be the most significant tourism industries. Combined, these industries account for 57.6% of direct tourism gross value added in 2011-12. In 2011-12, the following industry divisions were the most significant contributors to tourism gross value added: Accommodation and Food Services (34.3%); Transport, postal and warehousing (22.0%); Retail trade (13.7%); Ownership of dwellings (8.6%); and Education and training (6.4%).

CONTRIBUTION TO TOURISM VALUE ADDED, SELECTED INDUSTRY DIVISIONS



Direct tourism gross value added increased by \$1,909m (5.3%) in 2011-12 to \$37,621m, driven by strong growth across a number of tourism characteristic industries. The tourism related industries representing the largest contributors to the increase in tourism gross value added in this period were Accommodation (up \$446m, 7.4%), Air, water and other transport (up \$372m, 6.5%), Cafes, restaurants and takeaway food services (up \$291m, 7.6%), Ownership of dwellings (up \$230m, 7.7%) and Travel agency and tour operator services (up \$221m, 13.9%). Travel agency and tour operator services growth was driven by strong growth in domestic package tours (up 34.9%) in 2011-12. Only two 'industries' had falls in direct tourism gross value added in 2011-12, All other industries (down \$84m, -3.7%) and Education and training (down \$51m, -2.1%).

GROWTH IN TOURISM VALUE ADDED, SELECTED INDUSTRIES



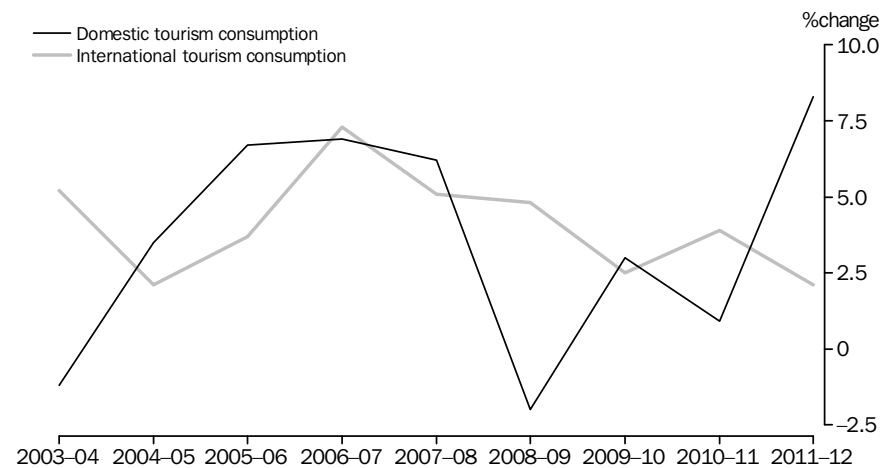
ANALYSIS OF RESULTS *continued*

COMPONENTS OF TOURISM CONSUMPTION

For 2011-12, domestic tourism consumption represented 76.0% of total tourism consumption, whereas international consumption represented 24.0%.

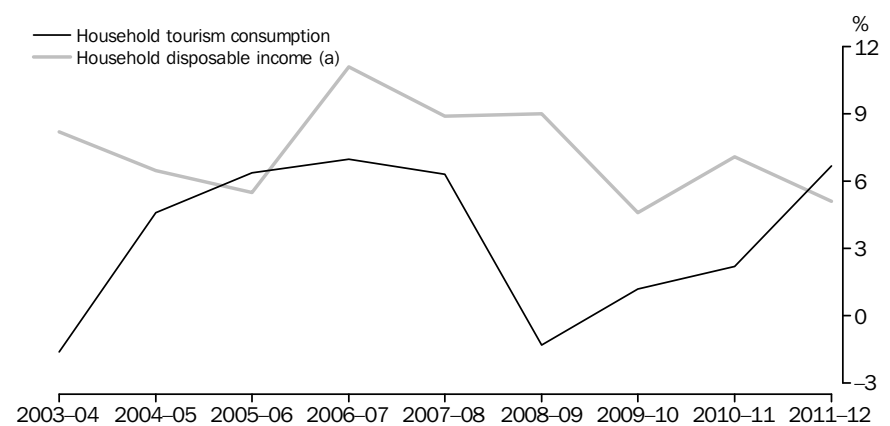
The increase in internal tourism consumption of 6.8% to \$106,552m in 2011-12 represented the highest annual growth rate for this aggregate since 2006-07. Of this figure, Domestic tourism consumption increased by 8.3% to \$81,005m in 2011-12, which is the strongest annual growth rate since 1998-99 (at a time when tourism accounted for 3.6% of total industry gross value added). International tourism consumption increased by 2.1% to \$25,547m in 2011-12, following an increase of 3.9% in 2010-11.

GROWTH IN DOMESTIC AND INTERNATIONAL TOURISM CONSUMPTION



Of the \$6,223m increase in domestic tourism consumption in 2011-12, consumption by households increased by \$4,193m (6.7%) and consumption by business and government increased by \$2,031m (16.1%). The contribution of domestic business/government tourism consumption to total internal tourism consumption increased from 12.7% in 2010-11 to 13.8% in 2011-12, its highest level since 2001-02. Changes in household disposable income are considered a key indicator of household consumption behaviour. The graph below presents a comparison of growth in disposable income and household tourism consumption since 2003-04.

GROWTH IN HOUSEHOLD TOURISM CONSUMPTION AND DISPOSABLE INCOME



(a) Source: Australian System of National Accounts (cat. no. 5204.0)

ANALYSIS OF RESULTS *continued*

COMPONENTS OF TOURISM CONSUMPTION *continued*

The major contributors to the increase in domestic tourism consumption in this period were Fuel (up \$1,463m, 18.0%), Takeaway and restaurant meals (up \$1,093m, 8.6%), Long distance passenger transportation (up \$969m, 8.5%); Accommodation services (up \$773m, 9.8%); Travel agency and tour operator services (up \$443m, 15.0%), and Food (up \$434m, up 9.4%). At the same time, reduced levels of domestic tourism consumption were only recorded for Other tourism goods and services (down \$183m, -9.0%).

SHARE OF TOURISM CONSUMPTION, Selected tourism products, By type of visitor: 2011–12

	<i>Households</i>	<i>Business/ government</i>	<i>International</i>	<i>All visitors</i>
	%	%	%	%
Long distance passenger transportation	11.3	32.8	21.4	16.7
Takeaway and restaurant meals	18.1	12.6	10.3	15.5
Shopping, gifts and souvenirs	15.7	—	11.8	12.6
Accommodation	7.4	25.6	13.9	11.5
Fuel (petrol, diesel)	12.3	9.8	1.9	9.4
Food products	7.1	2.0	7.7	6.6
Alcoholic beverages and other beverages	4.5	2.9	4.4	4.3
Imputed and actual rent on dwellings	5.2	—	3.1	4.0
All other tourism products	18.4	14.2	25.4	19.5
Total	100.0	100.0	100.0	100.0

— nil or rounded to zero (including null cells)

Major contributors to total tourism consumption continue to be Long distance passenger transportation, Takeaway and restaurant meals, Shopping (including gifts and souvenirs) and Accommodation services. Combined, these products contribute 56.2% of total tourism consumption in 2011-12. This combined contribution to total tourism consumption is down 0.4 percentage points on 2010-11.

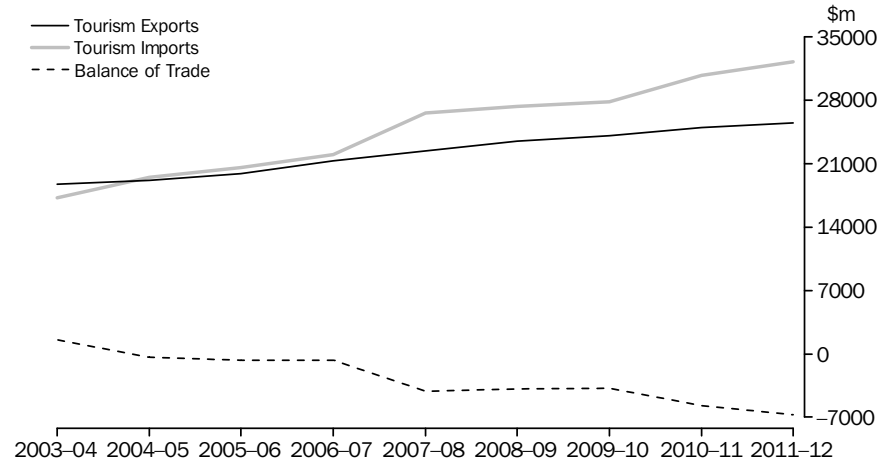
INTERNATIONAL TRADE IN TOURISM

Tourism exports are domestically produced goods and services consumed by international visitors to Australia. Tourism imports are consumption of overseas produced goods and services by Australians on overseas trips. Since 2004-05 tourism imports have exceeded tourism exports, resulting in deficits in the tourism balance of trade (tourism exports less tourism imports). In 2011-12 the deficit totalled \$6,734m.

ANALYSIS OF RESULTS *continued*

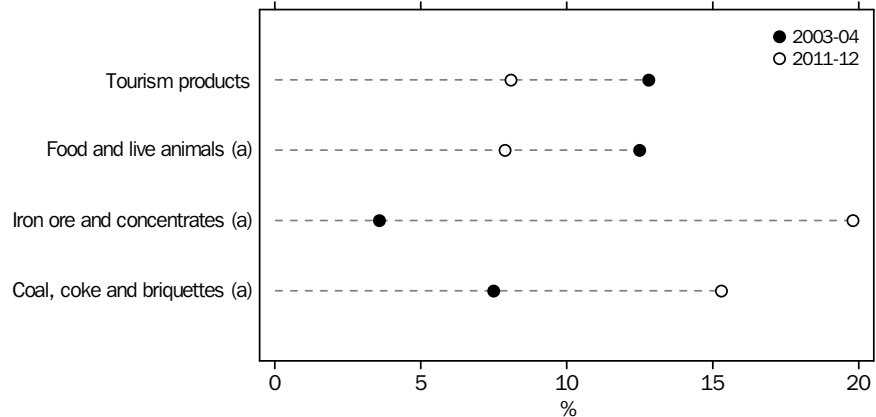
INTERNATIONAL TRADE IN TOURISM *continued*

INTERNATIONAL TRADE IN TOURISM



Despite the trade deficit, tourism makes an important contribution to Australia's total export earnings. Total tourism characteristic products compare favourably with some other Australian 'traditional' export products. Whilst the contribution of tourism to total exports has fallen from 12.8% in 2003-04 to 8.1% in 2011-12, in current price terms the value of these exports (international visitor consumption) has grown from \$18,776m to \$25,547m. In 2011-12 tourism made a slightly higher contribution to Australia's export earnings than food and live animal products, although it made a smaller contribution than key mining exports such as iron ore and concentrates and coal, coke and briquettes. These mining exports have experienced much higher growth rates over the period 2003-04 to 2011-12.

SELECTED EXPORT PRODUCTS, AS A % OF TOTAL EXPORTS



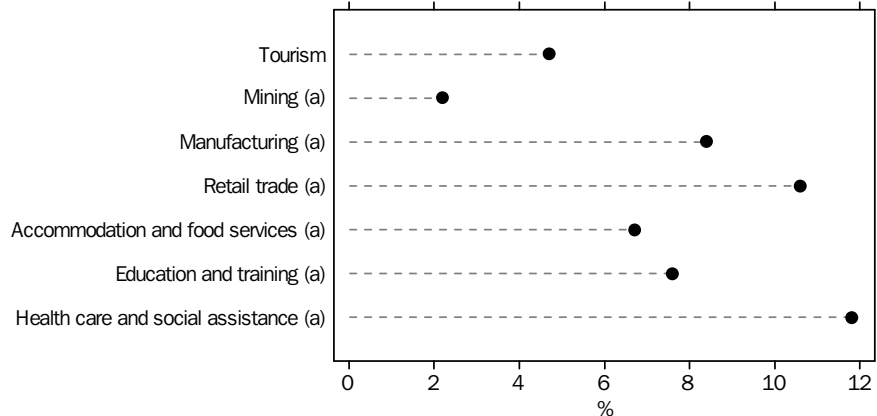
(a) Source: Balance of Payments and International Investment Position (cat. no. 5302.0)

ANALYSIS OF RESULTS *continued*

TOURISM EMPLOYED PERSONS

Tourism is an important source of employment in Australia, accounting for 4.6% of total employed persons in the economy. Tourism's share of total employment is greater than its share of gross value added (2.7%). This is because tourism tends to be more labour-intensive than, on average, other forms of economic activity. The tourism industry employed 531,900 persons in 2011-12, an increase of 1,600 (0.3%) on 2010-11. This compares with an increase of 1.1% in total employed persons in the Australian economy.

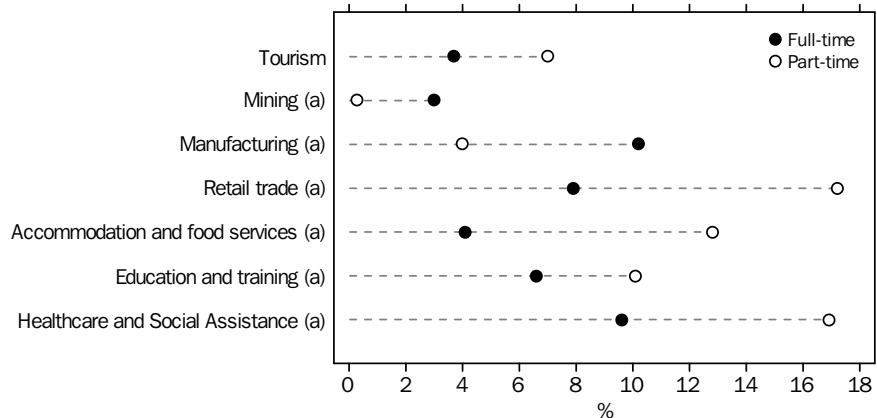
SELECTED INDUSTRIES, AS A % OF TOTAL EMPLOYED PERSONS: 2011-12



(a) Source: Labour Force (cat. no. 6202.0)

In 2011-12, 44.5% of total tourism employed persons were part-time. This compares with the economy wide proportion of part-time workers of 29.5%. This equates to tourism contributing 7.0% of total part-time employed persons in 2011-12. Only four other industries had a higher share of total part-time employed persons in 2011-12.

SELECTED INDUSTRIES, % OF FULL-TIME AND PART-TIME EMPLOYED PERSONS: 2011-12



(a) Source: Labour Force (cat. no. 6202.0)

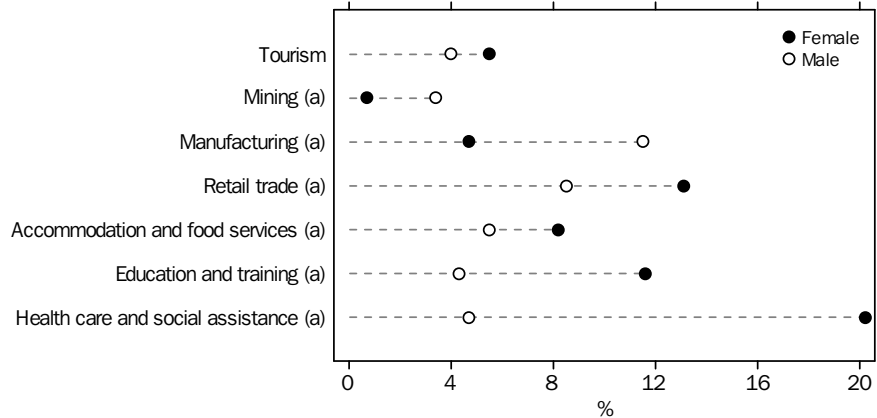
In 2011-12, tourism had 294,900 full-time employed persons, which accounted for 55.5% of tourism employment. Tourism had a lower relative share of full-time employed persons (3.6%) than twelve other industries (out of a total of nineteen industries), although this share was higher than the Mining industry despite the latter contributing more to total industry gross value added and exports of goods and services.

ANALYSIS OF RESULTS *continued*

TOURISM EMPLOYED PERSONS *continued*

This publication presents a split of tourism employed persons into male and female workers for the first time since experimental estimates were released relating to the reference year 1997-98. In 2011-12, females accounted for 286,000 tourism employed persons, or 53.8% of the tourism workforce. Tourism accounted for 5.5% of total female workers in 2011-12. In 2011-12, males accounted for 245,800 of tourism's employed persons (46.2% of tourism workforce), or 3.9% of total male employment.

SELECTED INDUSTRIES, AS A % OF MALE AND FEMALE EMPLOYED PERSONS: 2011-12

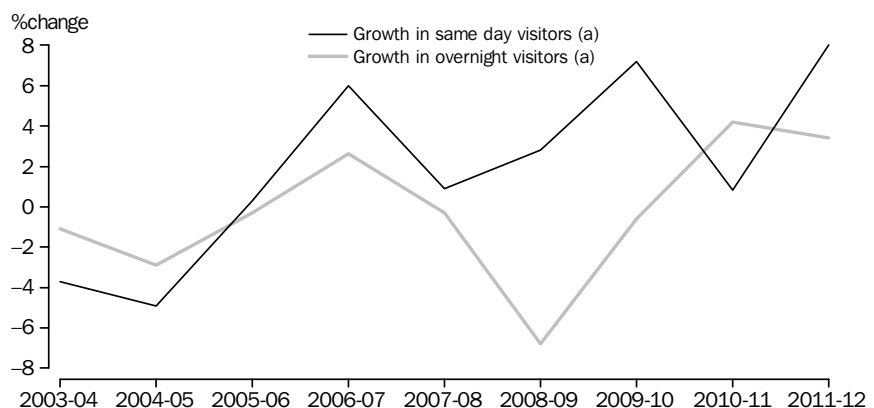


(a) Source: Labour Force (cat. no. 6202.0)

VISITOR NUMBERS

The increase in tourism consumption by same day domestic visitors in 2011-12 (up 11.5%) was driven by an increase in the number of same day visitors (up 8.0%) and an increase in average consumption by same day visitors (from \$107.40 to \$110.90 per trip (up 3.2%). The increase in tourism consumption by overnight domestic visitors (up 7.4%) was the result of an increase in the number of visitors (up 3.4%) combined with an increase in average consumption by overnight visitors (from \$817.0 in 2010-11 to \$848.8 in 2011-12, an increase of 3.9%).

GROWTH IN SAME DAY AND OVERNIGHT VISITOR NUMBERS



(a) Source: Tourism Research Australia

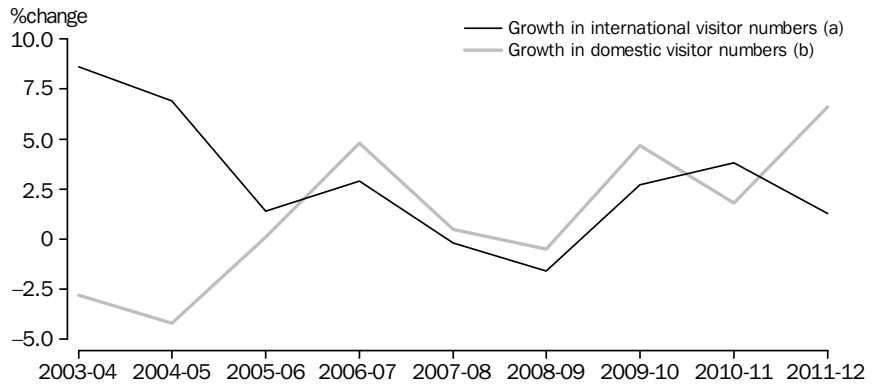
The increase in international tourism consumption in 2011-12 (up 2.1%) was the result of an increase in the number of visitors (up 1.3%) combined with an increase in average consumption by international visitors (up 0.8%). The overall increase in the number of international visitors to Australia was driven mainly by gains in the number of visitors

ANALYSIS OF RESULTS *continued*

VISITOR NUMBERS *continued*

from China (up 16.7%), New Zealand (up 0.8%), Indonesia (up 6.4%) and Taiwan (up 9.9%).

GROWTH IN INTERNATIONAL AND DOMESTIC VISITOR NUMBERS

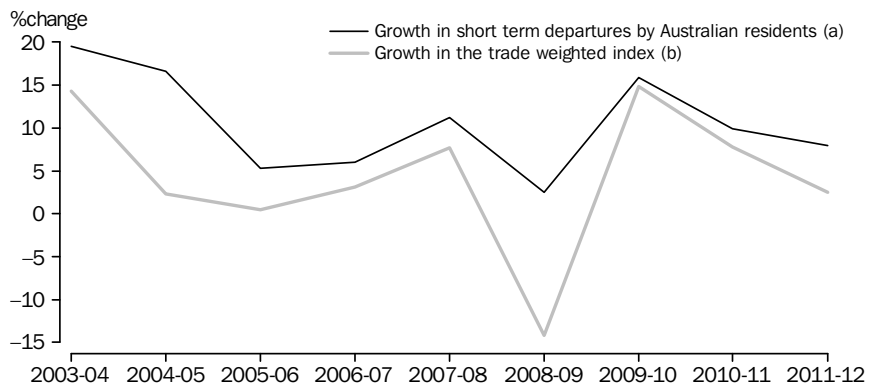


(a) Source: Overseas Arrivals and Departures (cat. no. 3401.0)
(b) Source: Tourism Research Australia

The number of Australians travelling overseas grew by 8.0% in 2011-12, with the growth driven by increased number of Australians visiting Thailand, Indonesia, and the United States of America.

The 8.0% growth in Australians travelling overseas in 2011-12 followed two years of strong growth of 15.9% in 2009-10 and 9.9% in 2010-11. Cumulatively, since 2008-09, the numbers of Australians travelling overseas increased by 2.197m (from 5.843m in 2008-09 to 8.040m in 2011-12) or 37.6%. This growth coincided with a strengthening in the Australian exchange rate, which after a significant fall against other currencies (as measured by the Trade Weighted Index) in the first seven months of 2008-09, increased by 43.8% between January 2009 and June 2012.

GROWTH IN AUSTRALIAN RESIDENT DEPARTURES AND THE TRADE WEIGHTED INDEX



(a) Source: Overseas Arrivals and Departures (cat. no. 3401.0)
(b) Source: Reserve Bank of Australia

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TOURISM INDUSTRY SHARE OF GROSS DOMESTIC PRODUCT

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

DIRECT TOURISM GROSS DOMESTIC PRODUCT (GDP) AND ASSOCIATED STATISTICS

Direct tourism gross value added at basic prices (\$m)	24 859	25 837	27 389	29 594	32 035	32 704	34 821	35 711	37 621
plus Tourism net taxes on tourism products (\$m)	2 314	2 423	2 509	2 860	3 065	3 053	3 134	3 224	3 398
equals Direct tourism GDP (\$m)	27 173	28 260	29 898	32 454	35 100	35 757	37 955	38 936	41 018
Gross domestic product(a) (\$m)	859 635	920 969	994 968	1 083 303	1 175 321	1 254 293	1 292 315	1 403 888	1 473 227
Tourism share of gross value added(b) (%)	3.2	3.1	3.0	3.0	3.0	2.8	2.9	2.7	2.7
Tourism share of gross domestic product(b) (%)	3.2	3.1	3.0	3.0	3.0	2.9	2.9	2.8	2.8

PERCENTAGE CHANGES (c)

Direct tourism gross value added at basic prices (%)	0.7	3.9	6.0	8.1	8.2	2.1	6.5	2.6	5.3
Tourism net taxes on products (%)	1.1	4.7	3.5	14.0	7.2	-0.4	2.7	2.9	5.4
Direct tourism GDP (%)	0.8	4.0	5.8	8.6	8.2	1.9	6.1	2.6	5.3
Gross domestic product (%)	7.3	7.1	8.0	8.9	8.5	6.7	3.0	8.6	4.9

(a) Source: Australian System of National Accounts, 2011-12 (cat. no. 5204.0)

(c) Percentage change on preceding year.

(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.

DIRECT TOURISM GROSS DOMESTIC PRODUCT, By type of visitor

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
.....									
DIRECT TOURISM GDP (\$m)									
Domestic									
Households	16 021	16 798	17 766	19 234	20 892	21 158	22 203	22 936	24 129
Business/government	3 849	3 871	4 264	4 551	4 920	4 714	5 416	5 266	5 992
<i>Total domestic</i>	19 870	20 669	22 030	23 785	25 812	25 872	27 619	28 202	30 121
International	7 303	7 591	7 868	8 669	9 288	9 885	10 335	10 734	10 897
TOTAL	27 173	28 260	29 898	32 454	35 100	35 757	37 955	38 936	41 018
.....									
SHARE OF DIRECT TOURISM GDP (%)									
Domestic									
Households	59.0	59.4	59.4	59.3	59.5	59.2	58.5	58.9	58.8
Business/government	14.2	13.7	14.3	14.0	14.0	13.2	14.3	13.5	14.6
<i>Total domestic</i>	73.1	73.1	73.7	73.3	73.5	72.4	72.8	72.4	73.4
International	26.9	26.9	26.3	26.7	26.5	27.6	27.2	27.6	26.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
.....									
TOURISM SHARE OF GDP (a) (%)									
Domestic									
Households	1.9	1.8	1.8	1.8	1.8	1.7	1.7	1.6	1.6
Business/government	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
<i>Total domestic</i>	2.3	2.2	2.2	2.2	2.2	2.1	2.1	2.0	2.0
International	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.7
TOTAL	3.2	3.1	3.0	3.0	3.0	2.9	2.9	2.8	2.8
.....									

(a) 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

DIRECT TOURISM OUTPUT, By tourism related industry - Basic Prices

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Tourism characteristic industries									
Accommodation	7 760	8 214	8 974	10 191	10 989	10 822	10 941	11 455	12 299
Ownership of dwellings	2 062	2 305	2 465	2 688	3 037	3 370	3 671	3 936	4 238
Cafes, restaurants and takeaway food services	7 721	8 032	8 322	8 835	9 571	9 325	9 651	9 880	10 628
Clubs, pubs, taverns and bars	2 933	3 059	3 215	3 290	3 537	3 488	3 855	3 956	4 214
Rail transport	809	790	868	889	910	903	936	912	976
Taxi transport	514	536	579	628	674	713	744	778	822
Other road transport	1 061	1 068	1 175	1 410	1 463	1 452	1 594	1 574	1 689
Air water and other transport	11 765	12 365	13 428	13 829	14 685	14 231	15 105	15 402	16 405
Motor vehicle hiring	827	861	946	1 062	1 064	1 085	1 192	1 137	1 194
Travel agency and tour operator services	1 824	1 862	2 153	2 271	2 414	2 340	2 347	2 469	2 811
Cultural services	987	995	1 036	1 101	1 126	1 210	1 152	1 152	1 203
Casinos and other gambling services	534	560	610	678	712	728	780	801	823
Sports and recreation services	1 607	1 619	1 687	1 662	1 700	1 828	2 024	2 024	2 112
<i>Total tourism characteristic industries</i>	<i>40 405</i>	<i>42 266</i>	<i>45 457</i>	<i>48 534</i>	<i>51 882</i>	<i>51 492</i>	<i>53 992</i>	<i>55 474</i>	<i>59 416</i>
Tourism connected industries									
Automotive fuel retailing	588	610	628	661	684	672	681	704	725
Other retail trade	6 686	6 916	7 106	7 429	7 690	7 542	7 694	7 935	8 175
Education and training	1 963	2 132	2 166	2 388	2 599	3 024	3 230	3 295	3 227
<i>Total tourism connected industries</i>	<i>9 237</i>	<i>9 658</i>	<i>9 900</i>	<i>10 478</i>	<i>10 973</i>	<i>11 238</i>	<i>11 605</i>	<i>11 934</i>	<i>12 126</i>
All other industries	3 348	2 944	2 696	2 748	2 889	2 886	3 286	3 163	3 046
DIRECT TOURISM OUTPUT, at basic prices	52 990	54 868	58 053	61 761	65 744	65 616	68 884	70 570	74 588

DIRECT TOURISM GROSS VALUE ADDED, By tourism related industry

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Tourism characteristic industries									
Accommodation	3 795	4 017	4 389	4 923	5 475	5 555	5 781	6 053	6 499
Ownership of dwellings	1 551	1 734	1 854	1 975	2 257	2 531	2 788	2 989	3 218
Cafes, restaurants and takeaway food outlets	2 752	2 756	2 745	2 798	3 312	3 500	3 749	3 838	4 129
Clubs, pubs, taverns and bars	1 422	1 483	1 558	1 629	1 811	1 842	2 099	2 154	2 295
Rail transport	378	384	438	465	476	473	488	476	509
Taxi transport	210	235	271	306	321	332	340	355	375
Other road transport	417	431	485	596	619	614	658	649	697
Air, water and other transport	4 124	4 337	4 709	5 043	5 365	5 207	5 598	5 707	6 079
Transport equipment rental	475	495	544	610	612	623	686	654	687
Travel agency and tour operator services	1 178	1 202	1 390	1 466	1 558	1 511	1 515	1 594	1 815
Cultural services	427	430	448	461	471	506	491	491	512
Casinos and other gambling services	299	314	341	380	399	407	437	449	461
Sports and recreation services	437	441	459	452	462	497	568	568	593
<i>Total tourism characteristic industries</i>	<i>17 465</i>	<i>18 257</i>	<i>19 632</i>	<i>21 105</i>	<i>23 137</i>	<i>23 599</i>	<i>25 197</i>	<i>25 975</i>	<i>27 868</i>
Tourism connected industries									
Automotive fuel retailing	159	159	157	159	175	182	195	202	208
Other retail trade	3 546	3 872	4 188	4 597	4 725	4 602	4 662	4 808	4 953
Education and training	1 480	1 607	1 633	1 786	1 943	2 261	2 413	2 461	2 410
<i>Total tourism connected industries</i>	<i>5 185</i>	<i>5 638</i>	<i>5 978</i>	<i>6 542</i>	<i>6 843</i>	<i>7 046</i>	<i>7 270</i>	<i>7 471</i>	<i>7 571</i>
All other industries	2 210	1 943	1 779	1 948	2 054	2 060	2 353	2 265	2 181
DIRECT TOURISM GROSS VALUE ADDED, at basic prices	24 859	25 837	27 389	29 594	32 035	32 704	34 821	35 711	37 621
Tourism net taxes on products	2 314	2 423	2 509	2 860	3 065	3 053	3 134	3 224	3 398
DIRECT TOURISM GDP	27 173	28 260	29 898	32 454	35 100	35 757	37 955	38 936	41 018

TOURISM CONTRIBUTION TO INDUSTRY GROSS VALUE ADDED, By tourism related industry

	2006-07			2009-10			Change in tourism contribution
	<i>Direct Tourism gross value added</i>	<i>Industry gross value added</i>	<i>Tourism contribution to industry gross value added (a)</i>	<i>Direct Tourism gross value added</i>	<i>Industry gross value added</i>	<i>Tourism contribution to industry gross value added (a)</i>	
	\$m	\$m	%	\$m	\$m	%	
Tourism characteristic industries							
Accommodation	4 923	6 418	77	5 781	7 450	78	1
Ownership of dwellings	1 975	73 573	3	2 788	101 873	3	—
Cafes, restaurants and takeaway food services	2 798	10 277	27	3 749	13 112	29	1
Clubs, pubs, taverns and bars	1 629	8 361	20	2 099	9 582	22	2
Rail transport	465	5 379	9	488	6 684	7	-1
Taxi transport	306	846	36	340	959	35	-1
Other road transport	596	16 125	4	658	18 342	4	—
Air water and other transport	5 043	8 526	59	5 598	9 926	56	-3
Motor vehicle hiring	610	950	64	686	1 067	64	—
Travel agency and tour operator services	1 466	1 591	92	1 515	1 572	96	4
Cultural services	461	3 031	15	491	3 379	15	-1
Casinos and other gambling services	380	3 569	11	437	3 940	11	—
Sports and recreation services	452	2 784	16	568	3 625	16	-1
<i>Total tourism characteristic industries</i>	<i>21 105</i>	<i>141 430</i>	<i>15</i>	<i>25 197</i>	<i>181 512</i>	<i>14</i>	<i>-1</i>
Tourism connected industries							
Automotive fuel retailing	159	1 652	10	195	2 248	9	-1
Other retail trade	4 597	49 521	9	4 662	56 129	8	-1
Education and training	1 786	46 467	4	2 413	57 272	4	—
<i>Total tourism connected industries</i>	<i>6 542</i>	<i>97 640</i>	<i>7</i>	<i>7 270</i>	<i>115 649</i>	<i>6</i>	<i>—</i>
All other industries	1 948	759 450	—	2 353	904 819	—	—
TOTAL	29 594	998 520	3	34 821	1 201 980	3	—
Tourism net taxes on products	2 860	84 783	3	3 134	90 335	4	—
DIRECT TOURISM GDP/GDP	32 454	1 083 303	3	37 955	1 292 315	3	—

— nil or rounded to zero (including null cells)

(a) Also referred to as the tourism ration.

TOURISM CONTRIBUTION TO INDUSTRY GROSS VALUE ADDED, By industry division(a)

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
DIRECT TOURISM GROSS VALUE ADDED (\$m)									
Agriculture, forestry and fishing	—	—	—	—	—	—	—	—	—
Mining	—	—	—	—	—	—	—	—	—
Manufacturing	—	—	—	—	—	—	—	—	—
Electricity, gas, water and waste services	—	—	—	—	—	—	—	—	—
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	—	—	—	—	—	—	—	—	—
Retail trade	3 705	4 031	4 345	4 756	4 900	4 784	4 857	5 009	5 161
Accommodation and food services	7 968	8 255	8 692	9 350	10 597	10 897	11 630	12 044	12 923
Transport, postal and warehousing	5 696	5 914	6 460	7 068	7 418	7 248	7 733	7 804	8 287
Information media and telecommunications	529	453	384	401	443	451	543	523	490
Financial and insurance services	66	57	48	50	55	56	68	65	61
Rental, hiring and real estate services(b)	508	523	568	635	638	651	719	686	717
Professional, scientific and technical services	5	4	3	4	4	4	5	5	4
Administrative and support services	1 364	1 361	1 525	1 606	1 713	1 669	1 705	1 777	1 986
Public administration and safety	—	—	—	—	—	—	—	—	—
Education and training	1 480	1 607	1 633	1 786	1 943	2 261	2 413	2 461	2 410
Health care and social assistance	593	507	430	445	493	503	604	581	544
Arts and recreation services	1 164	1 185	1 249	1 292	1 332	1 411	1 495	1 507	1 566
Other services	231	206	197	226	241	237	260	260	253
Ownership of dwellings	1 551	1 734	1 854	1 975	2 257	2 531	2 788	2 989	3 218
DIRECT TOURISM GROSS VALUE ADDED, at basic prices	24 859	25 837	27 389	29 594	32 035	32 704	34 821	35 711	37 621
TOTAL INDUSTRY GROSS VALUE ADDED (\$m)									
Agriculture, forestry and fishing	26 620	26 788	27 390	24 151	27 554	29 027	28 416	32 156	32 545
Mining	34 970	47 007	66 498	77 391	83 947	114 766	95 185	131 109	142 231
Manufacturing	96 541	98 648	102 300	105 215	112 264	110 035	107 782	107 808	105 111
Electricity, gas, water and waste services	21 599	23 142	24 092	24 939	26 319	27 544	29 751	33 810	35 573
Construction	55 836	61 541	66 974	76 025	82 846	90 524	96 694	103 338	106 496
Wholesale trade	42 501	44 296	45 952	48 652	53 487	53 440	55 830	59 525	63 548
Retail trade	42 285	44 475	46 710	51 173	55 052	57 161	58 377	61 914	65 595
Accommodation and food services	20 836	22 231	23 551	25 056	26 949	28 592	30 329	32 560	34 498
Transport, postal and warehousing	42 651	47 001	49 431	57 266	60 854	61 664	63 513	68 542	69 751
Information media and telecommunications	30 994	32 761	33 046	35 029	37 501	38 884	41 323	41 581	41 776
Financial and insurance services	70 670	80 412	88 542	101 472	110 448	120 728	123 588	133 931	144 850
Rental, hiring and real estate services(b)	18 670	19 613	21 040	23 309	25 639	26 001	27 613	29 166	32 159
Professional, scientific and technical services	43 968	47 565	52 376	59 344	67 067	74 394	80 945	88 882	97 539
Administrative and support services	20 038	21 520	23 694	26 665	29 905	28 902	30 728	34 319	35 313
Public administration and safety	43 774	46 714	51 007	54 416	56 238	60 597	64 202	68 241	70 089
Education and training	37 974	40 939	43 733	46 467	48 862	53 397	57 272	59 888	63 341
Health care and social assistance	46 126	49 048	53 535	58 671	64 346	68 156	73 878	80 025	87 114
Arts and recreation services	8 685	9 092	9 334	9 384	10 134	10 437	10 944	11 179	11 864
Other services	18 308	19 038	19 444	20 322	21 131	22 773	23 737	25 000	25 124
Ownership of dwellings	61 327	63 608	66 914	73 573	84 941	93 972	101 873	107 390	112 518
GROSS VALUE ADDED, at basic prices	784 373	845 439	915 563	998 520	1 085 484	1 170 994	1 201 980	1 310 364	1 377 036

— nil or rounded to zero (including null cells)

(b) Excludes Ownership of dwellings.

(a) See Appendix 1 for a concordance between tourism related industries and the Australian and New Zealand Standard Industrial Classification (ANZSIC).

continued

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

TOURISM SHARE OF INDUSTRY GROSS VALUE ADDED(b) (%)

Agriculture, forestry and fishing	—	—	—	—	—	—	—	—	—
Mining	—	—	—	—	—	—	—	—	—
Manufacturing	—	—	—	—	—	—	—	—	—
Electricity, gas, water and waste services	—	—	—	—	—	—	—	—	—
Construction	—	—	—	—	—	—	—	—	—
Wholesale trade	—	—	—	—	—	—	—	—	—
Retail trade	8.8	9.1	9.3	9.3	8.9	8.4	8.3	8.1	7.9
Accommodation and food services	38.2	37.1	36.9	37.3	39.3	38.1	38.3	37.0	37.5
Transport, postal and warehousing	13.4	12.6	13.1	12.3	12.2	11.8	12.2	11.4	11.9
Information media and telecommunications	1.7	1.4	1.2	1.1	1.2	1.2	1.3	1.3	1.2
Financial and insurance services	0.1	0.1	0.1	—	—	—	0.1	—	—
Rental, hiring and real estate services(c)	2.7	2.7	2.7	2.7	2.5	2.5	2.6	2.4	2.2
Professional, scientific and technical services	—	—	—	—	—	—	—	—	—
Administrative and support services	6.8	6.3	6.4	6.0	5.7	5.8	5.5	5.2	5.6
Public administration and safety	—	—	—	—	—	—	—	—	—
Education and training	3.9	3.9	3.7	3.8	4.0	4.2	4.2	4.1	3.8
Health care and social assistance	1.3	1.0	0.8	0.8	0.8	0.7	0.8	0.7	0.6
Arts and recreation services	13.4	13.0	13.4	13.8	13.1	13.5	13.7	13.5	13.2
Other services	1.3	1.1	1.0	1.1	1.1	1.0	1.1	1.0	1.0
Ownership of dwellings	2.5	2.7	2.8	2.7	2.7	2.7	2.7	2.8	2.9
TOTAL	3.2	3.1	3.0	3.0	3.0	2.8	2.9	2.7	2.7

— nil or rounded to zero (including null cells)

(a) See Appendix 1 for a concordance between tourism related industries and the Australian and New Zealand Standard Industrial Classification (ANZSIC).

(b) Also referred to as the tourism ratio

(c) Excludes Ownership of dwellings.

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

	Compensation of employees	Gross operating surplus/Gross mixed income	Other net taxes on production	Direct tourism gross value added, at basic prices
	\$m	\$m	\$m	\$m
2006-07				
Tourism characteristic industries				
Accommodation	3 001	1 655	268	4 923
Ownership of dwellings	—	1 783	192	1 975
Cafes, restaurants and takeaway food services	2 601	158	39	2 798
Clubs, pubs, taverns and bars	725	862	42	1 629
Rail transport	262	201	3	465
Taxi transport	103	202	1	306
Other road transport	327	238	31	596
Air, water and other transport	2 561	2 383	100	5 043
Motor vehicle hiring	132	472	7	610
Travel agency and tour operator services	1 026	381	59	1 466
Cultural services	324	130	7	461
Casinos and other gambling services	74	301	5	380
Sports and recreation activities	315	124	14	452
<i>Total tourism characteristic industries</i>	<i>11 448</i>	<i>8 889</i>	<i>767</i>	<i>21 105</i>
Tourism connected industries				
Automotive fuel retailing	92	63	3	159
Other retail trade	2 958	1 494	145	4 597
Education and training	1 539	228	19	1 786
<i>Total tourism connected industries</i>	<i>4 589</i>	<i>1 786</i>	<i>167</i>	<i>6 542</i>
All other industries	1 150	731	67	1 948
TOTAL	17 187	11 405	1 002	29 594

2009-10				
Tourism characteristic industries				
Accommodation	3 597	1 847	337	5 781
Ownership of dwellings	—	2 557	231	2 788
Cafes, restaurants and takeaway food services	2 947	756	47	3 749
Clubs, pubs, taverns and bars	979	1 062	58	2 099
Rail transport	251	236	1	488
Taxi transport	111	226	3	340
Other road transport	396	228	33	658
Air, water and other transport	3 022	2 457	120	5 598
Motor vehicle hiring	153	526	7	686
Travel agency and tour operator services	1 074	381	61	1 515
Cultural services	335	150	5	491
Casinos and other gambling services	85	346	6	437
Sports and recreation activities	369	181	19	568
<i>Total tourism characteristic industries</i>	<i>13 317</i>	<i>10 951</i>	<i>929</i>	<i>25 197</i>
Tourism connected industries				
Automotive fuel retailing	116	74	5	195
Other retail trade	3 101	1 399	163	4 662
Education and training	2 080	298	34	2 413
<i>Total tourism connected industries</i>	<i>5 297</i>	<i>1 771</i>	<i>202</i>	<i>7 270</i>
All other industries	1 338	932	83	2 353
TOTAL	19 952	13 654	1 214	34 821

— nil or rounded to zero (including null cells)

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

DIRECT TOURISM OUTPUT, By industry division - Basic prices(a)

	2006-07		2009-10	
	<i>Direct tourism product output</i>	<i>Contribution of tourism product output to total direct tourism output</i>	<i>Direct tourism product output</i>	<i>Contribution of tourism product output to total direct tourism output</i>
	\$m	%	\$m	%
Agriculture, forestry and fishing	—	—	—	—
Mining	—	—	—	—
Manufacturing	—	—	—	—
Electricity, gas, water and waste services	—	—	—	—
Construction	—	—	—	—
Wholesale trade	—	—	—	—
Retail trade	8 090	13.1	8 375	12.2
Accommodation and food services	22 538	36.5	24 699	35.9
Transport, postal and warehousing	17 679	28.6	19 278	28.0
Information media and telecommunications	568	0.9	762	1.1
Financial and insurance services	71	0.1	95	0.1
Rental, hiring and real estate services(b)	1 095	1.8	1 237	1.8
Professional, scientific and technical services	5	—	7	—
Administrative and support services	2 469	4.0	2 614	3.8
Public administration and safety	—	—	—	—
Education and training	2 388	3.9	3 230	4.7
Health care and social assistance	631	1.0	847	1.2
Arts and recreation services	3 220	5.2	3 705	5.4
Other services	319	0.5	364	0.5
Ownership of dwellings	2 688	4.4	3 671	5.3
TOTAL	61 761	100.0	68 884	100.0

— nil or rounded to zero (including null cells)

(a) See Appendix 1 for a concordance between tourism related industries and the Australian and New Zealand Standard Industrial Classification (ANZSIC).

(b) Excludes Ownership of dwellings.

SUMMARY OF INTERNAL TOURISM CONSUMPTION COMPONENTS, By tourism related product

	<i>Direct tourism output, at basic prices</i>	<i>Indirect tourism output, at basic prices(a)</i>	<i>Internal tourism consumption, at basic prices</i>	<i>Imports purchased in Australia by visitors</i>	<i>Tourism net taxes on products</i>	<i>Net taxes on indirect tourism output</i>	<i>Margins on tourism products</i>	<i>Internal tourism consumption, at purchasers' prices</i>
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
2006-07								
Tourism characteristic products								
Accommodation services	9 692	—	9 692	—	431	—	—	10 122
Actual and imputed rent on vacation homes	2 688	—	2 688	—	—	—	—	2 688
Takeaway and restaurant meals(b)	12 337	—	12 337	—	1 088	—	—	13 426
Taxi fares	628	—	628	—	30	—	—	657
Local area passenger transportation	898	—	898	—	-247	—	—	652
Long distance passenger transportation(c)	15 154	—	15 154	—	107	—	—	15 261
Motor vehicle hire and lease	1 288	—	1 288	—	90	—	—	1 378
Travel agency and tour operator services	2 931	—	2 931	—	—	—	—	2 931
Recreational, cultural and sporting services	2 916	—	2 916	—	251	—	17	3 183
Gambling and betting services	981	—	981	—	380	—	—	1 361
<i>Total tourism characteristic products</i>	<i>49 514</i>	<i>—</i>	<i>49 514</i>	<i>—</i>	<i>2 129</i>	<i>—</i>	<i>17</i>	<i>51 659</i>
Tourism connected products								
Shopping (including gifts and souvenirs)	53	3 049	3 101	2 940	462	487	5 167	12 158
Food products	85	3 330	3 415	442	23	78	2 474	6 431
Alcoholic beverages and other beverages	—	1 800	1 800	169	71	608	1 648	4 297
Motor vehicles, caravans, boats, etc	—	837	837	746	39	100	849	2 571
Fuel (petrol, diesel)	—	3 558	3 558	1 235	23	2 546	800	8 163
Repair and maintenance of motor vehicles	302	38	340	26	27	15	47	455
Education services	2 219	—	2 219	—	—	—	—	2 219
Retail margin	7 899	—	7 899	—	—	—	-7 899	—
Other margin	—	3 374	3 374	—	—	—	-3 374	—
<i>Total tourism connected products</i>	<i>10 558</i>	<i>15 986</i>	<i>26 544</i>	<i>5 558</i>	<i>645</i>	<i>3 834</i>	<i>-288</i>	<i>36 294</i>
Other tourism goods and services	1 689	109	1 798	105	86	155	271	2 416
TOTAL	61 761	16 095	77 856	5 664	2 860	3 989	—	90 369
2009-10								
Tourism characteristic products								
Accommodation services	10 410	—	10 410	—	437	—	—	10 846
Actual and imputed rent on vacation homes	3 671	—	3 671	—	—	—	—	3 671
Takeaway and restaurant meals(b)	13 756	—	13 756	—	1 203	—	—	14 959
Taxi fares	744	—	744	—	33	—	—	777
Local area passenger transportation	1 101	—	1 101	—	-287	—	—	814
Long distance passenger transportation(c)	16 324	—	16 324	—	200	—	—	16 524
Motor vehicle hire and lease	1 455	—	1 455	—	90	—	—	1 545
Travel agency and tour operator services	3 044	—	3 044	—	—	—	—	3 044
Recreational, cultural and sporting services	3 353	—	3 353	—	275	—	44	3 672
Gambling and betting services	1 079	—	1 079	—	398	—	—	1 477
<i>Total tourism characteristic products</i>	<i>54 936</i>	<i>—</i>	<i>54 936</i>	<i>—</i>	<i>2 349</i>	<i>—</i>	<i>44</i>	<i>57 328</i>
Tourism connected products								
Shopping (including gifts and souvenirs)	69	2 539	2 608	3 047	473	511	6 259	12 898
Food products	116	3 210	3 326	488	23	76	2 634	6 548
Alcoholic beverages and other beverages	—	1 681	1 681	197	85	749	1 584	4 296
Motor vehicles, caravans, boats, etc	—	616	616	626	35	71	635	1 983
Fuel (petrol, diesel)	—	3 019	3 019	1 661	34	2 813	929	8 457
Repair and maintenance of motor vehicles	335	26	361	30	30	9	42	473
Education services	3 036	—	3 036	—	1	—	—	3 037
Retail margin	8 123	—	8 123	—	—	—	-8 123	—
Other margin	—	4 291	4 291	—	—	—	-4 291	—
<i>Total tourism connected products</i>	<i>11 679</i>	<i>15 382</i>	<i>27 061</i>	<i>6 049</i>	<i>682</i>	<i>4 229</i>	<i>-330</i>	<i>37 692</i>
Other tourism goods and services	2 269	158	2 427	119	103	198	286	3 133
TOTAL	68 884	15 540	84 424	6 168	3 134	4 427	—	98 153
<p>— nil or rounded to zero (including null cells)</p> <p>(a) This represents the cost to retailers of domestically produced goods sold directly to visitors. Includes wholesale and transport margins supplied domestically.</p> <p>(b) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.</p> <p>(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.</p>								

	2006-07			2009-10		
	Internal tourism consumption	Total domestic output, at basic prices	Proportion of domestic output consumed by visitors(a)	Internal tourism consumption	Total domestic output, at basic prices	Proportion of domestic output consumed by visitors
			\$m			\$m
Tourism characteristic products						
Accommodation services	9 692	10 217	94.9	10 410	10 770	96.7
Actual and imputed rent on vacation homes	2 688	100 131	2.7	3 671	134 153	2.7
Takeaway and restaurant meals(b)	12 337	41 480	29.7	13 756	44 542	30.9
Taxi fares	628	1 737	36.1	744	2 101	35.4
Local area passenger transportation	898	8 946	10.0	1 101	10 691	10.3
Long distance passenger transportation(c)	15 154	16 962	89.3	16 324	18 201	89.7
Motor vehicle hire and lease	1 288	2 004	64.3	1 455	2 264	64.3
Travel agency and tour operator services	2 931	3 000	97.7	3 044	3 158	96.4
Recreational, cultural and sporting services	2 916	17 400	16.8	3 353	20 808	16.1
Gambling and betting services	981	12 721	7.7	1 079	13 350	8.1
<i>Total tourism characteristic products</i>	<i>49 514</i>	<i>214 598</i>	<i>23.1</i>	<i>54 936</i>	<i>260 038</i>	<i>21.1</i>
Tourism connected products						
Shopping (including gifts and souvenirs)	3 101	42 651	7.3	2 608	47 771	5.5
Food products	3 415	72 377	4.7	3 326	77 213	4.3
Alcoholic beverages and other beverages	1 800	15 253	11.8	1 681	16 590	10.1
Motor vehicles, caravans, boats, etc	837	14 045	6.0	616	10 975	5.6
Fuel (petrol, diesel)	3 558	22 026	16.2	3 019	20 096	15.0
Repair and maintenance of motor vehicles	340	22 017	1.5	361	24 018	1.5
Education services	2 219	59 939	3.7	3 036	73 995	4.1
Retail margin	7 899	69 046	11.4	8 123	77 315	10.5
Other margin	3 374	115 049	2.9	4 291	134 946	3.2
<i>Total tourism connected products</i>	<i>26 544</i>	<i>432 403</i>	<i>6.1</i>	<i>27 061</i>	<i>482 919</i>	<i>5.6</i>
Other tourism goods and services	1 798	162 743	1.1	2 427	190 494	1.3
All other goods and services	—	1 305 339	—	—	1 548 272	—
TOTAL	77 856	2 115 083	3.7	84 424	2 481 723	3.4

— nil or rounded to zero (including null cells)

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

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

(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
INTERNAL TOURISM EXPENDITURE (a)									
Tourism characteristic products									
Accommodation services	7 575	8 035	8 835	10 122	10 910	10 755	10 846	11 382	12 220
Actual and imputed rent on vacation homes	1 131	1 306	1 350	1 464	1 640	1 785	1 882	2 084	2 253
Takeaway and restaurant meals(b)	11 917	12 397	12 844	13 426	14 544	14 170	14 959	15 313	16 474
Taxi fares	543	566	612	657	706	747	777	812	858
Local area passenger transportation	528	527	572	652	732	753	814	799	870
Long distance passenger transportation(c)	12 762	13 335	14 470	15 261	16 044	15 530	16 524	16 760	17 783
Motor vehicle hire and lease	1 100	1 146	1 259	1 378	1 381	1 408	1 545	1 474	1 548
Travel agency and tour operator services	2 339	2 387	2 760	2 931	3 116	3 021	3 044	3 201	3 646
Recreational, cultural and sporting services	2 169	2 144	2 222	2 273	2 298	2 429	2 582	2 544	2 653
Gambling and betting services	1 093	1 143	1 256	1 361	1 409	1 470	1 477	1 509	1 516
<i>Total tourism characteristic products</i>	<i>41 156</i>	<i>42 987</i>	<i>46 180</i>	<i>49 524</i>	<i>52 781</i>	<i>52 067</i>	<i>54 450</i>	<i>55 879</i>	<i>59 818</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	10 814	10 876	10 675	10 771	11 384	11 531	11 530	11 594	11 980
Food products	5 043	4 790	5 040	5 266	5 385	5 345	5 326	5 187	5 598
Alcoholic beverages and other beverages	2 956	3 129	3 425	3 961	4 013	3 875	3 943	3 799	4 127
Motor vehicles, caravans, boats, etc	1 726	2 113	2 446	2 571	2 715	2 318	1 983	1 998	2 063
Fuel (petrol, diesel)	5 544	5 892	6 968	8 069	8 580	8 603	8 356	8 450	9 938
Repair and maintenance of motor vehicles	447	416	424	455	477	465	473	482	485
Education services	1 825	1 992	2 021	2 219	2 427	2 839	3 037	3 102	3 026
<i>Total tourism connected products</i>	<i>28 354</i>	<i>29 209</i>	<i>30 999</i>	<i>33 313</i>	<i>34 981</i>	<i>34 976</i>	<i>34 648</i>	<i>34 614</i>	<i>37 216</i>
Other tourism goods and services	3 005	2 594	2 249	2 013	2 245	2 304	2 738	2 638	2 489
TOTAL	72 515	74 789	79 428	84 850	90 007	89 347	91 835	93 131	99 523
IMPUTED CONSUMPTION (d)									
Tourism characteristic products									
Accommodation services	—	—	—	—	—	—	—	—	—
Actual and imputed rent on vacation homes	931	999	1 116	1 225	1 397	1 585	1 789	1 852	1 985
Takeaway and restaurant meals(b)	—	—	—	—	—	—	—	—	—
Taxi fares	—	—	—	—	—	—	—	—	—
Local area passenger transportation	—	—	—	—	—	—	—	—	—
Long distance passenger transportation(c)	—	—	—	—	—	—	—	—	—
Motor vehicle hire and lease	—	—	—	—	—	—	—	—	—
Travel agency and tour operator services	—	—	—	—	—	—	—	—	—
Recreational, cultural and sporting services	789	835	882	911	957	1 072	1 090	1 129	1 182
Gambling and betting services	—	—	—	—	—	—	—	—	—
<i>Total tourism characteristic products</i>	<i>1 720</i>	<i>1 834</i>	<i>1 998</i>	<i>2 135</i>	<i>2 354</i>	<i>2 656</i>	<i>2 879</i>	<i>2 982</i>	<i>3 167</i>
Tourism connected products									
Shopping (including gifts and souvenirs)	1 276	1 297	1 254	1 387	1 387	1 339	1 368	1 431	1 471
Food products	1 011	1 018	1 028	1 165	1 166	1 196	1 222	1 333	1 418
Alcoholic beverages and other beverages	289	303	302	335	337	343	353	383	408
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—	—	—	—
Fuel (petrol, diesel)	63	72	83	94	99	99	101	117	129
Repair and maintenance of motor vehicles	—	—	—	—	—	—	—	—	—
Education services	—	—	—	—	—	—	—	—	—
<i>Total tourism connected products</i>	<i>2 639</i>	<i>2 689</i>	<i>2 667</i>	<i>2 981</i>	<i>2 989</i>	<i>2 976</i>	<i>3 044</i>	<i>3 264</i>	<i>3 427</i>
Other tourism goods and services	349	371	376	402	402	391	395	421	436
TOTAL	4 708	4 895	5 041	5 518	5 745	6 024	6 318	6 667	7 029
—	nil or rounded to zero (including null cells)		(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.						
(a)	Consists of the amount paid by national and international visitors or on behalf of a visitor for and during his/her trip and stay at the destination		(d) Consists of imputations made for the consumption by visitors of certain goods and services for which they do not make a payment						
(b)	Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.								

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

\$m \$m \$m \$m \$m \$m \$m \$m \$m

TOTAL INTERNAL TOURISM CONSUMPTION (a)

Tourism characteristic products

Accommodation services	7 575	8 035	8 835	10 122	10 910	10 755	10 846	11 382	12 220
Actual and imputed rent on vacation homes	2 062	2 305	2 465	2 688	3 037	3 370	3 671	3 936	4 238
Takeaway and restaurant meals(b)	11 917	12 397	12 844	13 426	14 544	14 170	14 959	15 313	16 474
Taxi fares	543	566	612	657	706	747	777	812	858
Local area passenger transportation	528	527	572	652	732	753	814	799	870
Long distance passenger transportation(c)	12 762	13 335	14 470	15 261	16 044	15 530	16 524	16 760	17 783
Motor vehicle hire and lease	1 100	1 146	1 259	1 378	1 381	1 408	1 545	1 474	1 548
Travel agency and tour operator services	2 339	2 387	2 760	2 931	3 116	3 021	3 044	3 201	3 646
Recreational, cultural and sporting services	2 958	2 980	3 104	3 183	3 255	3 500	3 672	3 674	3 835
Gambling and betting services	1 093	1 143	1 256	1 361	1 409	1 470	1 477	1 509	1 516
<i>Total tourism characteristic products</i>	<i>42 876</i>	<i>44 821</i>	<i>48 178</i>	<i>51 659</i>	<i>55 134</i>	<i>54 724</i>	<i>57 328</i>	<i>58 861</i>	<i>62 985</i>

Tourism connected products

Shopping (including gifts and souvenirs)	12 090	12 172	11 928	12 158	12 771	12 870	12 898	13 025	13 451
Food products	6 053	5 808	6 068	6 431	6 551	6 541	6 548	6 519	7 016
Alcoholic beverages and other beverages	3 245	3 432	3 728	4 297	4 350	4 218	4 296	4 183	4 534
Motor vehicles, caravans, boats, etc	1 726	2 113	2 446	2 571	2 715	2 318	1 983	1 998	2 063
Fuel (petrol, diesel)	5 607	5 964	7 051	8 163	8 679	8 702	8 457	8 568	10 067
Repair and maintenance of motor vehicles	447	416	424	455	477	465	473	482	485
Education services	1 825	1 992	2 021	2 219	2 427	2 839	3 037	3 102	3 026
<i>Total tourism connected products</i>	<i>30 993</i>	<i>31 898</i>	<i>33 666</i>	<i>36 294</i>	<i>37 969</i>	<i>37 952</i>	<i>37 692</i>	<i>37 878</i>	<i>40 642</i>

Other tourism goods and services

	3 355	2 965	2 625	2 416	2 647	2 695	3 133	3 059	2 925
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TOTAL **77 223** **79 684** **84 469** **90 369** **95 751** **95 371** **98 153** **99 798** **106 552**

(a) Consists of all tourism consumption of visitors, both resident and non-resident, within Australia

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

(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
DOMESTIC HOUSEHOLDS (a)									
Tourism characteristic products									
Accommodation services	2 604	3 203	3 465	4 122	4 531	4 497	4 288	4 616	4 911
Actual and imputed rent on vacation homes	1 687	1 897	2 005	2 209	2 489	2 786	2 955	3 221	3 434
Takeaway and restaurant meals(b)	8 589	9 149	9 583	9 908	10 739	10 463	10 850	11 281	11 995
Taxi fares	155	177	251	249	278	298	238	324	265
Local area passenger transportation	148	154	184	215	247	246	293	275	312
Long distance passenger transportation(c)	4 827	4 847	5 459	6 195	6 720	6 336	6 782	6 842	7 517
Motor vehicle hire and lease	565	610	678	730	706	775	831	828	838
Travel agency and tour operator services	1 419	1 450	1 731	1 865	1 999	1 936	1 958	2 077	2 396
Recreational, cultural and sporting services	2 534	2 628	2 746	2 821	2 837	3 068	3 228	3 257	3 414
Gambling and betting services	775	802	887	971	962	986	988	1 032	1 036
<i>Total tourism characteristic products</i>	<i>23 302</i>	<i>24 917</i>	<i>26 989</i>	<i>29 285</i>	<i>31 507</i>	<i>31 391</i>	<i>32 411</i>	<i>33 754</i>	<i>36 118</i>
Tourism connected products									
Shopping, gifts and souvenirs	9 610	9 712	9 563	9 582	10 120	10 056	10 101	10 156	10 432
Food products	4 480	4 257	4 474	4 641	4 696	4 591	4 447	4 394	4 740
Alcoholic beverages and other beverages	2 161	2 297	2 594	2 955	2 952	2 877	2 829	2 743	2 974
Motor vehicles, caravans, boats, etc	1 552	1 908	2 010	2 204	2 337	1 955	1 562	1 549	1 623
Fuel (petrol, diesel)	3 993	4 611	5 605	6 565	7 042	7 023	6 810	7 044	8 137
Repair and maintenance of motor vehicles	306	316	337	367	395	389	384	384	384
Education services	96	108	115	117	122	142	170	163	173
<i>Total tourism connected products</i>	<i>22 197</i>	<i>23 211</i>	<i>24 698</i>	<i>26 432</i>	<i>27 665</i>	<i>27 033</i>	<i>26 303</i>	<i>26 434</i>	<i>28 462</i>
Other tourism goods and services	2 605	2 204	1 849	1 542	1 695	1 673	2 113	1 964	1 763
TOTAL	48 105	50 331	53 536	57 258	60 867	60 097	60 827	62 151	66 344
DOMESTIC BUSINESS/GOVERNMENT (a)									
Tourism characteristic products									
Accommodation services	2 681	2 534	2 832	3 122	3 265	3 015	3 389	3 281	3 759
Actual and imputed rent on vacation homes	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(b)	1 477	1 357	1 296	1 339	1 494	1 330	1 627	1 466	1 844
Taxi fares	272	283	250	282	291	301	388	336	431
Local area passenger transportation	19	20	29	24	41	35	50	45	54
Long distance passenger transportation(c)	2 886	3 222	3 814	3 914	4 217	4 025	4 465	4 510	4 803
Motor vehicle hire and lease	231	240	231	248	261	257	348	266	347
Travel agency and tour operator services	617	628	736	796	848	812	832	870	994
Recreational, cultural and sporting services	—	—	—	—	—	—	—	—	—
Gambling and betting services	—	—	—	—	—	—	—	—	—
<i>Total tourism characteristic products</i>	<i>8 182</i>	<i>8 283</i>	<i>9 188</i>	<i>9 727</i>	<i>10 416</i>	<i>9 775</i>	<i>11 098</i>	<i>10 774</i>	<i>12 232</i>
Tourism connected products									
Shopping, gifts and souvenirs	—	—	—	—	—	—	—	—	—
Food products	242	239	223	207	197	213	268	211	298
Alcoholic beverages and other beverages	305	373	338	423	423	334	407	343	430
Motor vehicles, caravans, boats, etc	—	—	—	—	—	—	—	—	—
Fuel (petrol, diesel)	1 380	1 099	1 133	1 246	1 249	1 288	1 250	1 071	1 442
Repair and maintenance of motor vehicles	110	67	52	50	44	33	51	51	51
Education services	64	68	77	80	85	93	100	112	121
<i>Total tourism connected products</i>	<i>2 101</i>	<i>1 845</i>	<i>1 823</i>	<i>2 007</i>	<i>1 998</i>	<i>1 961</i>	<i>2 076</i>	<i>1 787</i>	<i>2 341</i>
Other tourism goods and services	60	57	49	60	64	60	79	69	87
TOTAL	10 343	10 186	11 060	11 794	12 478	11 796	13 253	12 630	14 661
<p>— nil or rounded to zero (including null cells)</p> <p>(a) Includes expenditure by outbound Australian residents within Australia before/after international trips.</p> <p>(b) Includes all beverages bought and consumed in licensed restaurants, cafes, clubs, pubs, taverns and bars.</p> <p>(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.</p>									

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
DOMESTIC TOTAL (a)									
Tourism characteristic products									
Accommodation services	5 285	5 737	6 297	7 244	7 796	7 512	7 677	7 897	8 670
Actual and imputed rent on vacation homes	1 687	1 897	2 005	2 209	2 489	2 786	2 955	3 221	3 434
Takeaway and restaurant meals(b)	10 066	10 506	10 879	11 247	12 233	11 793	12 477	12 747	13 839
Taxi fares	427	460	501	531	569	599	626	660	696
Local area passenger transportation	167	174	213	239	288	281	343	320	366
Long distance passenger transportation(c)	7 713	8 069	9 273	10 109	10 937	10 361	11 247	11 352	12 320
Motor vehicle hire and lease	796	850	909	978	967	1 032	1 179	1 094	1 185
Travel agency and tour operator services	2 036	2 078	2 467	2 661	2 847	2 748	2 790	2 947	3 390
Recreational, cultural and sporting services	2 534	2 628	2 746	2 821	2 837	3 068	3 228	3 257	3 414
Gambling and betting services	775	802	887	971	962	986	988	1 032	1 036
<i>Total tourism characteristic products</i>	<i>31 484</i>	<i>33 200</i>	<i>36 177</i>	<i>39 012</i>	<i>41 923</i>	<i>41 166</i>	<i>43 509</i>	<i>44 528</i>	<i>48 350</i>
Tourism connected products									
Shopping, gifts and souvenirs	9 610	9 712	9 563	9 582	10 120	10 056	10 101	10 156	10 432
Food products	4 722	4 496	4 697	4 848	4 893	4 804	4 715	4 605	5 038
Alcoholic beverages and other beverages	2 466	2 670	2 932	3 378	3 375	3 211	3 236	3 086	3 404
Motor vehicles, caravans, boats, etc	1 552	1 908	2 010	2 204	2 337	1 955	1 562	1 549	1 623
Fuel (petrol, diesel)	5 373	5 710	6 738	7 811	8 291	8 311	8 060	8 115	9 579
Repair and maintenance of motor vehicles	416	383	389	417	439	422	435	435	435
Education services	160	176	192	197	207	235	270	275	294
<i>Total tourism connected products</i>	<i>24 298</i>	<i>25 056</i>	<i>26 521</i>	<i>28 439</i>	<i>29 663</i>	<i>28 994</i>	<i>28 379</i>	<i>28 221</i>	<i>30 803</i>
Other tourism goods and services	2 665	2 261	1 898	1 602	1 759	1 733	2 192	2 033	1 850
TOTAL	58 448	60 517	64 596	69 052	73 345	71 893	74 080	74 781	81 005
INTERNATIONAL									
Tourism characteristic products									
Accommodation services	2 291	2 298	2 538	2 878	3 114	3 243	3 170	3 485	3 549
Actual and imputed rent on vacation homes	375	408	460	479	547	583	716	715	804
Takeaway and restaurant meals(b)	1 851	1 891	1 964	2 178	2 311	2 377	2 483	2 567	2 635
Taxi fares	116	106	111	126	137	148	150	152	161
Local area passenger transportation	361	353	360	413	444	472	470	478	504
Long distance passenger transportation(c)	5 048	5 266	5 198	5 151	5 107	5 170	5 276	5 409	5 462
Motor vehicle hire and lease	305	296	351	400	414	376	366	380	362
Travel agency and tour operator services	303	309	293	271	270	273	254	255	256
Recreational, cultural and sporting services	424	351	358	362	418	432	444	416	421
Gambling and betting services	318	341	369	390	448	484	488	477	480
<i>Total tourism characteristic products</i>	<i>11 392</i>	<i>11 621</i>	<i>12 002</i>	<i>12 648</i>	<i>13 211</i>	<i>13 557</i>	<i>13 819</i>	<i>14 334</i>	<i>14 634</i>
Tourism connected products									
Shopping, gifts and souvenirs	2 480	2 460	2 366	2 576	2 651	2 814	2 798	2 869	3 019
Food products	1 332	1 312	1 371	1 583	1 658	1 737	1 833	1 915	1 977
Alcoholic beverages and other beverages	779	762	796	919	974	1 007	1 061	1 096	1 131
Motor vehicles, caravans, boats, etc	174	205	436	367	378	363	420	449	440
Fuel (petrol, diesel)	234	254	313	351	389	391	397	453	489
Repair and maintenance of motor vehicles	31	33	35	37	39	43	38	48	51
Education services	1 665	1 816	1 829	2 022	2 219	2 603	2 767	2 827	2 732
<i>Total tourism connected products</i>	<i>6 695</i>	<i>6 842</i>	<i>7 145</i>	<i>7 855</i>	<i>8 307</i>	<i>8 958</i>	<i>9 313</i>	<i>9 657</i>	<i>9 839</i>
Other tourism goods and services	689	704	726	814	888	962	941	1 026	1 075
TOTAL	18 776	19 167	19 873	21 316	22 406	23 477	24 073	25 017	25 547

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

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

(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
TOTAL									
Tourism characteristic products									
Accommodation services	7 575	8 035	8 835	10 122	10 910	10 755	10 846	11 382	12 220
Imputed and actual rent on dwellings	2 062	2 305	2 465	2 688	3 037	3 370	3 671	3 936	4 238
Takeaway and restaurant meals(a)	11 917	12 397	12 844	13 426	14 544	14 170	14 959	15 313	16 474
Taxi fares	543	566	612	657	706	747	777	812	858
Local area passenger transportation	528	527	572	652	732	753	814	799	870
Long distance passenger transportation(b)	12 762	13 335	14 470	15 261	16 044	15 530	16 524	16 760	17 783
Motor vehicle hire and lease	1 100	1 146	1 259	1 378	1 381	1 408	1 545	1 474	1 548
Travel agency and tour operator services	2 339	2 387	2 760	2 931	3 116	3 021	3 044	3 201	3 646
Recreational, cultural and sporting services	2 958	2 980	3 104	3 183	3 255	3 500	3 672	3 674	3 835
Gambling and betting services	1 093	1 143	1 256	1 361	1 409	1 470	1 477	1 509	1 516
<i>Total tourism characteristic products</i>	<i>42 876</i>	<i>44 821</i>	<i>48 178</i>	<i>51 659</i>	<i>55 134</i>	<i>54 724</i>	<i>57 328</i>	<i>58 861</i>	<i>62 985</i>
Tourism connected products									
Shopping, gifts and souvenirs	12 090	12 172	11 928	12 158	12 771	12 870	12 898	13 025	13 451
Food products	6 053	5 808	6 068	6 431	6 551	6 541	6 548	6 519	7 016
Alcoholic beverages and other beverages	3 245	3 432	3 728	4 297	4 350	4 218	4 296	4 183	4 534
Motor vehicles, caravans, boats, etc	1 726	2 113	2 446	2 571	2 715	2 318	1 983	1 998	2 063
Fuel (petrol, diesel)	5 607	5 964	7 051	8 163	8 679	8 702	8 457	8 568	10 067
Repair and maintenance of motor vehicles	447	416	424	455	477	465	473	482	485
Education services	1 825	1 992	2 021	2 219	2 427	2 839	3 037	3 102	3 026
<i>Total tourism connected products</i>	<i>30 993</i>	<i>31 898</i>	<i>33 666</i>	<i>36 294</i>	<i>37 969</i>	<i>37 952</i>	<i>37 692</i>	<i>37 878</i>	<i>40 642</i>
Other tourism goods and services	3 355	2 965	2 625	2 416	2 647	2 695	3 133	3 059	2 925
TOTAL	77 223	79 684	84 469	90 369	95 751	95 371	98 153	99 798	106 552

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

(b) Includes expenditure on outbound and inbound services provided by Australian international carriers.

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$	\$	\$	\$	\$	\$	\$	\$	\$
DOMESTIC (b)									
Tourism characteristic products									
Accommodation services	24.9	28.2	30.9	34.0	36.4	35.2	34.4	34.7	35.8
Actual and imputed rent on vacation homes	7.9	9.3	9.9	10.4	11.6	13.1	13.2	14.2	14.2
Takeaway and restaurant meals(c)	47.4	51.7	53.5	52.7	57.1	55.3	55.9	56.1	57.1
Taxi fares	2.0	2.3	2.5	2.5	2.7	2.8	2.8	2.9	2.9
Local area passenger transportation	0.8	0.9	1.0	1.1	1.3	1.3	1.5	1.4	1.5
Long distance passenger transportation(d)	36.3	39.7	45.6	47.4	51.0	48.6	50.4	49.9	50.9
Motor vehicle hire and lease	3.7	4.2	4.5	4.6	4.5	4.8	5.3	4.8	4.9
Travel agency and tour operator services	9.6	10.2	12.1	12.5	13.3	12.9	12.5	13.0	14.0
Recreational, cultural and sporting services	11.9	12.9	13.5	13.2	13.2	14.4	14.5	14.3	14.1
Gambling and betting services	3.6	3.9	4.4	4.6	4.5	4.6	4.4	4.5	4.3
<i>Total tourism characteristic products</i>	<i>148.3</i>	<i>163.3</i>	<i>177.7</i>	<i>182.9</i>	<i>195.7</i>	<i>193.0</i>	<i>194.9</i>	<i>195.9</i>	<i>199.6</i>
Tourism connected products									
Shopping, gifts and souvenirs	45.3	47.8	47.0	44.9	47.2	47.2	45.3	44.7	43.1
Food products	22.2	22.1	23.1	22.7	22.8	22.5	21.1	20.3	20.8
Alcoholic beverages and other beverages	11.6	13.1	14.4	15.8	15.8	15.1	14.5	13.6	14.1
Motor vehicles, caravans, boats, etc	7.3	9.4	9.9	10.3	10.9	9.2	7.0	6.8	6.7
Fuel (petrol, diesel)	25.3	28.1	33.1	36.6	38.7	39.0	36.1	35.7	39.5
Repair and maintenance of motor vehicles	2.0	1.9	1.9	2.0	2.0	2.0	1.9	1.9	1.8
Education services	0.8	0.9	0.9	0.9	1.0	1.1	1.2	1.2	1.2
<i>Total tourism connected products</i>	<i>114.5</i>	<i>123.2</i>	<i>130.3</i>	<i>133.3</i>	<i>138.4</i>	<i>136.0</i>	<i>127.1</i>	<i>124.2</i>	<i>127.2</i>
Other tourism goods and services	12.6	11.1	9.3	7.5	8.2	8.1	9.8	8.9	7.6
TOTAL	275.4	297.6	317.4	323.7	342.3	337.1	331.9	329.1	334.4
INTERNATIONAL									
Tourism characteristic products									
Accommodation services	453.0	425.0	462.8	510.2	553.2	585.2	556.8	590.0	593.3
Actual and imputed rent on vacation homes	74.2	75.4	83.9	85.0	97.3	105.3	125.8	121.0	134.5
Takeaway and restaurant meals(c)	366.1	349.6	358.1	386.1	410.6	428.9	436.1	434.5	440.4
Taxi fares	22.9	19.6	20.3	22.3	24.4	26.7	26.4	25.7	27.0
Local area passenger transportation	71.4	65.4	65.6	73.2	78.9	85.2	82.7	81.0	84.2
Long distance passenger transportation(d)	998.3	973.7	947.8	913.1	907.2	932.9	926.9	915.7	913.1
Motor vehicle hire and lease	60.2	54.8	63.9	70.9	73.6	67.8	64.4	64.3	60.6
Travel agency and tour operator services	59.9	57.1	53.4	48.0	47.9	49.3	44.7	43.1	42.7
Recreational, cultural and sporting services	83.8	65.0	65.2	64.2	74.3	78.1	78.0	70.5	70.3
Gambling and betting services	62.9	63.1	67.3	69.1	79.5	87.3	85.8	80.7	80.2
<i>Total tourism characteristic products</i>	<i>2 252.7</i>	<i>2 148.7</i>	<i>2 188.4</i>	<i>2 242.0</i>	<i>2 346.7</i>	<i>2 446.6</i>	<i>2 427.6</i>	<i>2 426.6</i>	<i>2 446.4</i>
Tourism connected products									
Shopping, gifts and souvenirs	490.4	454.9	431.4	456.6	470.9	507.9	491.5	485.7	504.8
Food products	263.4	242.6	250.0	280.6	294.6	313.5	322.0	324.1	330.5
Alcoholic beverages and other beverages	154.0	140.9	145.1	162.9	173.0	181.7	186.3	185.6	189.0
Motor vehicles, caravans, boats, etc	34.4	37.9	79.5	65.0	67.1	65.5	73.8	76.0	73.6
Fuel (petrol, diesel)	46.3	47.0	57.1	62.3	69.0	70.5	69.7	76.6	81.7
Repair and maintenance of motor vehicles	6.1	6.1	6.4	6.5	6.9	7.8	6.7	8.1	8.5
Education services	329.2	335.7	333.5	358.4	394.2	469.8	486.1	478.6	456.7
<i>Total tourism connected products</i>	<i>1 323.8</i>	<i>1 265.1</i>	<i>1 302.9</i>	<i>1 392.4</i>	<i>1 475.7</i>	<i>1 616.7</i>	<i>1 636.0</i>	<i>1 634.9</i>	<i>1 644.7</i>
Other tourism goods and services	136.2	130.1	132.4	144.2	157.8	173.6	165.4	173.7	179.6
TOTAL	3 712.7	3 543.9	3 623.7	3 778.6	3 980.2	4 236.9	4 229.0	4 235.1	4 270.8

(a) Average consumption per trip is derived based on the number of trips as outlined in Table 19 of this publication.

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

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

(d) Includes expenditure on outbound and inbound services provided by Australian international carriers.

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	\$	\$	\$	\$	\$	\$	\$	\$	\$
TOTAL									
Tourism characteristic products									
Accommodation services	34.9	38.5	42.3	46.2	49.6	49.2	47.4	48.8	49.2
Actual and imputed rent on vacation homes	9.5	11.0	11.8	12.3	13.8	15.4	16.0	16.9	17.1
Takeaway and restaurant meals(b)	54.8	59.4	61.4	61.3	66.1	64.8	65.3	65.7	66.4
Taxi fares	2.5	2.7	2.9	3.0	3.2	3.4	3.4	3.5	3.5
Local area passenger transportation	2.4	2.5	2.7	3.0	3.3	3.4	3.6	3.4	3.5
Long distance passenger transportation(c)	58.7	63.9	69.2	69.7	73.0	71.0	72.2	71.9	71.6
Motor vehicle hire and lease	5.1	5.5	6.0	6.3	6.3	6.4	6.8	6.3	6.2
Travel agency and tour operator services	10.8	11.4	13.2	13.4	14.2	13.8	13.3	13.7	14.7
Recreational, cultural and sporting services	13.6	14.3	14.8	14.5	14.8	16.0	16.0	15.8	15.4
Gambling and betting services	5.0	5.5	6.0	6.2	6.4	6.7	6.5	6.5	6.1
<i>Total tourism characteristic products</i>	<i>197.3</i>	<i>214.7</i>	<i>230.5</i>	<i>235.9</i>	<i>250.7</i>	<i>250.1</i>	<i>250.4</i>	<i>252.4</i>	<i>253.8</i>
Tourism connected products									
Shopping, gifts and souvenirs	55.6	58.3	57.1	55.5	58.1	58.8	56.3	55.9	54.2
Food products	27.9	27.8	29.0	29.4	29.8	29.9	28.6	28.0	28.3
Alcoholic beverages and other beverages	14.9	16.4	17.8	19.6	19.8	19.3	18.8	17.9	18.3
Motor vehicles, caravans, boats, etc	7.9	10.1	11.7	11.7	12.3	10.6	8.7	8.6	8.3
Fuel (petrol, diesel)	25.8	28.6	33.7	37.3	39.5	39.8	36.9	36.7	40.6
Repair and maintenance of motor vehicles	2.1	2.0	2.0	2.1	2.2	2.1	2.1	2.1	2.0
Education services	8.4	9.5	9.7	10.1	11.0	13.0	13.3	13.3	12.2
<i>Total tourism connected products</i>	<i>142.6</i>	<i>152.8</i>	<i>161.1</i>	<i>165.8</i>	<i>172.7</i>	<i>173.4</i>	<i>164.7</i>	<i>162.4</i>	<i>163.7</i>
Other tourism goods and services	15.4	14.2	12.6	11.0	12.0	12.3	13.7	13.1	11.8
TOTAL	355.4	381.7	404.1	412.7	435.4	435.9	428.8	428.0	429.3

(a) Average consumption per trip is derived based on the number of trips as outlined in Table 19 of this publication.

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

(c) Includes expenditure on outbound and inbound services provided by Australian international carriers.

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

TOTAL CONSUMPTION - SAME DAY (\$m)

Tourism characteristic products									
Accommodation services	—	—	—	—	—	—	—	—	—
Actual and imputed rent on vacation homes	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	2 090	2 153	2 364	2 625	2 766	2 858	3 288	3 166	3 460
Taxi fares	48	39	44	52	45	51	66	55	95
Local area passenger transportation	50	58	55	89	102	109	125	114	142
Long distance passenger transportation	490	498	576	640	656	638	666	674	714
Motor vehicle hire and lease	35	45	49	52	60	43	67	53	63
Travel agency and tour operator services	5	4	6	7	6	6	5	4	4
Recreational, cultural and sporting services	421	436	469	498	450	550	676	658	713
Gambling and betting services	294	304	336	368	364	374	374	391	392
<i>Total tourism characteristic products</i>	3 433	3 536	3 899	4 331	4 450	4 628	5 268	5 116	5 583
Tourism connected products									
Shopping, gifts and souvenirs	3 662	3 753	3 811	3 982	4 279	4 224	4 578	4 330	4 762
Food products	1 035	918	1 018	1 009	1 017	1 010	1 000	955	1 002
Alcoholic beverages and other beverages	508	522	587	792	759	793	805	756	851
Motor vehicles	806	990	1 044	1 139	1 212	985	800	798	839
Fuel (petrol, diesel)	2 061	2 283	2 818	3 353	3 604	3 708	3 719	3 796	4 496
Repair and maintenance of motor vehicles	108	156	143	149	144	164	178	193	193
Education	68	74	80	86	92	100	108	118	130
<i>Total tourism connected products</i>	8 247	8 697	9 501	10 511	11 106	10 985	11 187	10 946	12 272
Other tourism goods and services	960	747	748	668	685	902	900	728	872
TOTAL	12 639	12 980	14 148	15 510	16 241	16 515	17 355	16 790	18 727

AVERAGE TOURISM CONSUMPTION PER TRIP - SAME DAY (b) (\$)

Tourism characteristic products									
Accommodation services	—	—	—	—	—	—	—	—	—
Actual and imputed rent on vacation homes	—	—	—	—	—	—	—	—	—
Takeaway and restaurant meals(a)	15.2	16.4	18.0	18.8	19.7	19.7	21.2	20.3	20.5
Taxi fares	0.3	0.3	0.3	0.4	0.3	0.4	0.4	0.4	0.6
Local area passenger transportation	0.4	0.4	0.4	0.6	0.7	0.8	0.8	0.7	0.8
Long distance passenger transportation	3.6	3.8	4.4	4.6	4.7	4.4	4.3	4.3	4.2
Motor vehicle hire and lease	0.3	0.3	0.4	0.4	0.4	0.3	0.4	0.3	0.4
Travel agency and tour operator services	—	—	—	0.1	—	—	—	—	—
Recreational, cultural and sporting services	3.1	3.3	3.6	3.6	3.2	3.8	4.4	4.2	4.2
Gambling and betting services	2.1	2.3	2.6	2.6	2.6	2.6	2.4	2.5	2.3
<i>Total tourism characteristic products</i>	24.9	27.0	29.6	31.0	31.6	32.0	34.0	32.7	33.1
Tourism connected products									
Shopping, gifts and souvenirs	26.6	28.6	29.0	28.5	30.4	29.2	29.5	27.7	28.2
Food products	7.5	7.0	7.7	7.2	7.2	7.0	6.4	6.1	5.9
Alcoholic beverages and other beverages	3.7	4.0	4.5	5.7	5.4	5.5	5.2	4.8	5.0
Motor vehicles	5.8	7.5	7.9	8.2	8.6	6.8	5.2	5.1	5.0
Fuel (petrol, diesel)	14.9	17.4	21.4	24.0	25.6	25.6	24.0	24.3	26.6
Repair and maintenance of motor vehicles	0.8	1.2	1.1	1.1	1.0	1.1	1.1	1.2	1.1
Education	0.5	0.6	0.6	0.6	0.7	0.7	0.7	0.8	0.8
<i>Total tourism connected products</i>	59.8	66.3	72.2	75.3	78.9	75.9	72.1	70.0	72.7
Other tourism goods and services	7.0	5.7	5.7	4.8	4.9	6.2	5.8	4.7	5.2
TOTAL	91.7	99.0	107.5	111.1	115.4	114.1	111.9	107.4	110.9

— nil or rounded to zero (including null cells)

(b) Average consumption per trip is derived based on the number of trips as outlined in table 19 of this publication.

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

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

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

Tourism characteristic products									
Accommodation services	5 284	5 737	6 297	7 244	7 795	7 512	7 677	7 897	8 670
Actual and imputed rent on vacation homes	1 687	1 897	2 005	2 209	2 489	2 786	2 955	3 221	3 434
Takeaway and restaurant meals(b)	7 976	8 353	8 516	8 623	9 467	8 935	9 188	9 580	10 380
Taxi fares	379	421	457	479	523	548	560	604	601
Local area passenger transportation	116	116	158	150	187	172	219	207	224
Long distance passenger transportation(c)	7 223	7 571	8 697	9 470	10 281	9 723	10 581	10 677	11 607
Motor vehicle hire and lease	760	805	860	927	907	989	1 112	1 041	1 122
Travel agency and tour operator services	2 031	2 074	2 462	2 653	2 840	2 742	2 784	2 943	3 386
Recreational, cultural and sporting services	2 113	2 193	2 277	2 323	2 387	2 518	2 552	2 600	2 701
Gambling and betting services	481	498	551	603	597	612	614	641	643
<i>Total tourism characteristic products</i>	28 051	29 665	32 278	34 681	37 474	36 538	38 241	39 412	42 768
Tourism connected products									
Shopping, gifts and souvenirs	5 948	5 959	5 752	5 600	5 842	5 831	5 523	5 826	5 670
Food products	3 687	3 577	3 680	3 839	3 876	3 794	3 715	3 649	4 037
Alcoholic beverages and other beverages	1 958	2 148	2 345	2 585	2 617	2 417	2 431	2 330	2 553
Motor vehicles	746	918	966	1 065	1 125	969	763	751	784
Fuel (petrol, diesel)	3 312	3 427	3 920	4 459	4 687	4 603	4 341	4 319	5 082
Repair and maintenance of motor vehicles	308	227	246	269	295	258	257	242	242
Education	92	103	111	111	115	135	163	157	164
<i>Total tourism connected products</i>	16 051	16 359	17 020	17 928	18 556	18 008	17 192	17 275	18 532
Other tourism goods and services	1 706	1 514	1 150	934	1 074	832	1 291	1 305	978
TOTAL	45 808	47 537	50 448	53 543	57 104	55 378	56 724	57 991	62 278

AVERAGE TOURISM CONSUMPTION PER TRIP - OVERNIGHT (a)(d) (\$)

Tourism characteristic products									
Accommodation services	71.1	79.5	87.5	98.2	106.0	109.6	112.7	111.3	118.2
Actual and imputed rent on vacation homes	22.7	26.3	27.9	29.9	33.9	40.7	43.4	45.4	46.8
Takeaway and restaurant meals(b)	107.3	115.7	118.4	116.9	128.8	130.4	134.8	135.0	141.5
Taxi fares	5.1	5.8	6.4	6.5	7.1	8.0	8.2	8.5	8.2
Local area passenger transportation	1.6	1.6	2.2	2.0	2.5	2.5	3.2	2.9	3.1
Long distance passenger transportation(c)	97.1	104.9	120.9	128.4	139.8	141.9	155.3	150.4	158.2
Motor vehicle hire and lease	10.2	11.1	12.0	12.6	12.3	14.4	16.3	14.7	15.3
Travel agency and tour operator services	27.3	28.7	34.2	36.0	38.6	40.0	40.9	41.5	46.1
Recreational, cultural and sporting services	28.4	30.4	31.7	31.5	32.5	36.7	37.4	36.6	36.8
Gambling and betting services	6.5	6.9	7.7	8.2	8.1	8.9	9.0	9.0	8.8
<i>Total tourism characteristic products</i>	377.3	411.0	448.7	470.1	509.7	533.1	561.2	555.3	582.9
Tourism connected products									
Shopping, gifts and souvenirs	80.0	82.6	80.0	75.9	79.4	85.1	81.0	82.1	77.3
Food products	49.6	49.6	51.2	52.0	52.7	55.4	54.5	51.4	55.0
Alcoholic beverages and other beverages	26.3	29.8	32.6	35.0	35.6	35.3	35.7	32.8	34.8
Motor vehicles	10.0	12.7	13.4	14.4	15.3	14.1	11.2	10.6	10.7
Fuel (petrol, diesel)	44.5	47.5	54.5	60.4	63.7	67.2	63.7	60.8	69.3
Repair and maintenance of motor vehicles	4.1	3.1	3.4	3.6	4.0	3.8	3.8	3.4	3.3
Education	1.2	1.4	1.5	1.5	1.6	2.0	2.4	2.2	2.2
<i>Total tourism connected products</i>	215.9	226.6	236.6	243.0	252.4	262.7	252.3	243.4	252.6
Other tourism goods and services	22.9	21.0	16.0	12.7	14.6	12.1	18.9	18.4	13.3
TOTAL	616.1	658.6	701.3	725.8	776.6	808.0	832.4	817.0	848.8

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

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

(c) Includes expenditure by outbound Australian residents on services provided by Australian international carriers.

(d) Average consumption per trip is derived based on the number of trips as outlined in table 19 of this publication.

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TOURISM CONSUMPTION BY AUSTRALIAN RESIDENTS ON OUTBOUND TRIPS

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

Domestic tourism consumption - outbound trips(a)									
Purchased by businesses (\$m)	489	548	503	561	563	534	508	693	1 062
Purchased by households (\$m)	2 071	2 254	2 798	3 228	3 798	3 918	4 318	4 666	5 712
Total (\$m)	2 560	2 801	3 300	3 789	4 361	4 452	4 825	5 359	6 774
Outbound tourism consumption(b) (c)									
Purchased by businesses (\$m)	3 704	3 827	3 997	4 232	4 848	4 470	4 221	4 323	4 587
Purchased by households (\$m)	13 531	15 679	16 587	17 757	21 733	22 904	23 624	26 407	27 695
Total (\$m)	17 234	19 506	20 583	21 989	26 580	27 375	27 845	30 730	32 282
TOTAL CONSUMPTION BY AUSTRALIAN RESIDENTS ON OUTBOUND TRIPS (\$m)	19 795	22 307	23 884	25 778	30 942	31 826	32 670	36 088	39 056
AVERAGE CONSUMPTION BY AUSTRALIAN RESIDENTS ON OUTBOUND TRIPS (\$)	5 028.0	4 858.5	4 939.8	5 027.8	5 428.7	5 446.4	4 825.3	4 848.5	4 857.5

(a) Comprises consumption by outbound Australian residents before/after international trips.

(b) Outbound tourism consumption is the tourism consumption of an Australian resident outside of Australia while on an international trip.

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

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TOURISM CONSUMPTION BY NON-RESIDENTS ON INBOUND TRIPS

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

Consumption by international visitors outside Australia as part of an inbound trip (\$m)	4 680	4 897	5 249	5 086	5 547	5 918	5 119	5 226	5 341
International tourism consumption(a)(b)									
Purchased by businesses (\$m)	2 412	2 476	2 519	2 624	2 707	2 781	2 742	2 865	2 914
Purchased by households (\$m)	16 364	16 691	17 354	18 692	19 699	20 696	21 331	22 151	22 633
Total (\$m)	18 776	19 167	19 873	21 316	22 406	23 477	24 073	25 017	25 547
TOTAL CONSUMPTION BY NON-RESIDENTS ON INBOUND TRIPS (\$m)	23 456	24 064	25 122	26 402	27 953	29 395	29 192	30 243	30 889
AVERAGE CONSUMPTION BY NON-RESIDENTS ON INBOUND TRIPS (\$)	4 637.9	4 449.6	4 581.2	4 680.2	4 965.8	5 304.9	5 128.1	5 119.8	5 163.4

(a) International tourism consumption is the tourism consumption of a non-resident visitor within Australia.

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

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

PART-TIME TOURISM EMPLOYMENT (a)

Tourism characteristic and connected industries									
Accommodation ('000)	29.4	30.5	29.6	29.7	30.3	29.1	33.4	30.0	29.1
Cafes, restaurants and takeaway food services ('000)	63.8	65.9	64.2	72.6	73.3	78.5	84.9	87.3	86.5
Clubs, pubs, taverns and bars ('000)	12.2	12.8	13.6	13.9	13.8	15.0	16.8	17.0	17.2
Rail transport ('000)	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.1
Road transport and transport equipment rental ('000)	3.8	3.6	3.4	3.8	3.8	4.1	3.5	3.3	3.3
Air, water and other transport ('000)	5.3	6.2	7.0	7.0	5.4	6.5	6.7	6.5	9.0
Travel agency and tour operator services ('000)	3.1	5.1	4.7	5.9	6.4	8.2	7.8	6.5	7.4
Cultural services ('000)	3.0	3.6	4.1	3.3	3.9	4.1	4.2	3.7	4.2
Casinos and other gambling services ('000)	0.7	0.9	1.1	1.0	1.1	0.9	1.2	1.4	1.0
Other sports and recreation services ('000)	8.7	8.7	10.2	10.1	9.8	10.1	10.5	9.8	10.9
Retail trade ('000)	44.9	46.9	48.9	51.3	50.1	51.0	48.0	50.0	48.3
Education and training ('000)	10.5	9.9	10.7	10.5	11.3	12.1	12.9	13.5	14.3
Total ('000)	185.7	194.2	197.5	209.3	209.3	219.8	230.3	229.2	231.4
All other industries ('000)	4.4	4.5	4.7	4.8	4.9	5.0	5.4	5.5	5.6
TOTAL TOURISM PART-TIME EMPLOYED PERSONS ('000)	190.1	198.7	202.2	214.1	214.3	224.8	235.6	234.7	236.9
TOTAL PART-TIME EMPLOYED PERSONS ('000)	2 710.0	2 767.8	2 881.9	2 944.8	3 030.6	3 126.6	3 281.1	3 336.7	3 383.9
TOURISM INDUSTRY SHARE OF PART-TIME EMPLOYED PERSONS (%)	7.0	7.2	7.0	7.3	7.1	7.2	7.2	7.0	7.0

FULL-TIME TOURISM EMPLOYMENT (b)

Tourism characteristic and connected industries									
Accommodation ('000)	41.0	44.4	44.9	43.9	44.3	41.3	39.6	41.7	39.4
Cafes, restaurants and takeaway food services ('000)	51.3	49.8	49.9	44.2	47.3	50.1	48.8	55.6	54.7
Clubs, pubs, taverns and bars ('000)	12.6	13.8	13.5	15.3	15.8	15.2	18.1	15.1	15.9
Rail transport ('000)	2.5	2.5	2.7	2.4	2.4	3.4	3.3	3.4	3.2
Road transport and transport equipment rental ('000)	17.2	15.5	15.9	16.1	16.5	16.6	15.7	15.3	15.8
Air, water and other transport ('000)	27.2	27.4	29.0	28.3	30.0	29.2	26.4	27.9	28.7
Travel agency and tour operator services ('000)	18.5	18.4	21.0	21.2	25.0	20.0	23.5	24.6	25.0
Cultural services ('000)	4.9	6.3	5.6	6.7	6.6	6.3	6.0	6.0	7.0
Casinos and other gambling services ('000)	1.3	1.5	2.0	2.1	2.4	2.9	2.7	2.9	2.8
Other sports and recreation services ('000)	7.7	7.7	8.8	9.6	9.8	10.4	8.8	10.2	9.4
Retail trade ('000)	50.4	55.3	57.8	60.0	61.0	55.1	51.3	52.0	52.6
Education and training ('000)	19.2	18.3	18.8	18.4	20.3	21.0	22.0	22.9	22.2
Total ('000)	253.9	260.8	269.8	268.2	281.6	271.5	266.2	277.7	276.8
All other industries ('000)	15.2	15.8	16.1	16.8	17.2	17.5	17.4	17.9	18.2
TOTAL TOURISM FULL-TIME EMPLOYED PERSONS ('000)	269.1	276.6	286.0	285.0	298.7	289.0	283.6	295.6	294.9
TOTAL FULL-TIME EMPLOYED PERSONS ('000)	6 868.4	7 069.9	7 257.9	7 495.0	7 730.6	7 827.7	7 779.7	8 010.5	8 086.8
TOURISM INDUSTRY SHARE OF FULL-TIME EMPLOYED PERSONS (%)	3.9	3.9	3.9	3.8	3.9	3.7	3.6	3.7	3.6

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

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

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

TOTAL TOURISM EMPLOYMENT (a)

Tourism characteristic and connected industries									
Accommodation ('000)	70.4	74.9	74.5	73.6	74.6	70.4	73.0	71.8	68.6
Cafes, restaurants and takeaway food services ('000)	115.2	115.7	114.1	116.8	120.6	128.6	133.7	142.9	141.1
Clubs, pubs, taverns and bars ('000)	24.8	26.6	27.1	29.2	29.6	30.2	35.0	32.1	33.1
Rail transport ('000)	2.6	2.5	2.8	2.5	2.5	3.6	3.5	3.6	3.3
Road transport and transport equipment rental ('000)	21.0	19.1	19.2	19.9	20.3	20.7	19.2	18.6	19.1
Air, water and other transport ('000)	32.5	33.6	35.9	35.3	35.5	35.7	33.1	34.5	37.7
Travel agency and tour operator services ('000)	21.6	23.5	25.6	27.1	31.4	28.2	31.3	31.1	32.4
Cultural services ('000)	8.0	9.9	9.7	10.0	10.5	10.4	10.2	9.7	11.2
Casinos and other gambling services ('000)	2.0	2.5	3.1	3.1	3.5	3.9	4.0	4.3	3.8
Other sports and recreation services ('000)	16.3	16.3	19.0	19.7	19.6	20.4	19.3	20.1	20.3
Retail trade ('000)	95.4	102.2	106.7	111.3	111.1	106.0	99.3	102.0	101.0
Education and training ('000)	29.7	28.1	29.5	28.9	31.6	33.1	35.0	36.4	36.6
Total ('000)	439.6	455.0	467.3	477.5	490.9	491.3	496.5	506.9	508.1
All other industries ('000)	19.6	20.3	20.8	21.6	22.1	22.5	22.8	23.4	23.7
TOTAL TOURISM EMPLOYED PERSONS ('000)	459.2	475.3	488.2	499.1	513.0	513.8	519.3	530.3	531.9
TOTAL EMPLOYED PERSONS ('000)	9 578.4	9 837.7	10 139.8	10 439.8	10 761.2	10 954.3	11 060.9	11 347.1	11 470.7
TOURISM INDUSTRY SHARE OF TOTAL EMPLOYED PERSONS (%)	4.8	4.8	4.8	4.8	4.8	4.7	4.7	4.7	4.6

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

2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12

MALE TOURISM EMPLOYMENT (a)

Tourism characteristic and connected industries									
Accommodation ('000)	27.5	28.2	26.9	27.3	28.1	26.0	27.3	28.4	25.3
Cafes, restaurants and takeaway food services ('000)	53.5	52.8	49.9	50.2	53.7	58.3	59.5	65.6	62.1
Clubs, pubs, taverns and bars ('000)	11.6	12.5	12.4	14.0	14.1	13.8	16.8	15.1	16.7
Rail transport ('000)	2.2	2.1	2.4	2.1	2.1	3.1	3.0	2.9	2.9
Road transport and transport equipment rental ('000)	17.5	16.2	16.1	16.9	17.3	17.4	16.4	16.0	16.2
Air, water and other transport ('000)	22.6	22.4	24.4	22.4	24.8	21.9	20.6	22.0	24.3
Travel agency and tour operator services ('000)	8.4	10.0	10.9	7.7	10.0	6.6	10.0	10.3	10.4
Cultural services ('000)	4.0	5.7	5.1	5.6	6.0	5.9	5.2	5.1	5.9
Casinos and other gambling services ('000)	1.1	1.2	1.7	1.7	1.9	2.2	2.1	2.2	2.4
Other sports and recreation services ('000)	8.1	7.6	9.1	9.6	10.2	10.8	10.2	10.9	10.4
Retail trade ('000)	42.9	46.2	47.7	48.6	49.6	45.6	43.4	44.9	44.1
Education and training ('000)	9.8	9.2	9.5	9.1	10.3	10.0	10.7	10.9	11.2
Total ('000)	209.3	214.3	215.9	215.1	228.2	221.7	225.2	234.4	231.9
All other industries ('000)	11.7	12.0	12.4	12.8	13.0	13.3	13.4	13.8	13.9
TOTAL TOURISM MALE EMPLOYED PERSONS ('000)	221.0	226.3	228.3	227.9	241.2	235.0	238.6	248.2	245.8
TOTAL MALE EMPLOYED PERSONS ('000)	5 311.2	5 429.2	5 570.2	5 730.1	5 902.0	5 969.4	6 031.2	6 196.6	6 237.9
TOURISM INDUSTRY SHARE OF TOTAL MALE EMPLOYED PERSONS (%)	4.2	4.2	4.1	4.0	4.1	3.9	4.0	4.0	3.9

FEMALE TOURISM EMPLOYMENT (b)

Tourism characteristic and connected industries									
Accommodation ('000)	42.9	46.7	47.7	46.3	46.5	44.4	45.7	43.4	43.3
Cafes, restaurants and takeaway food services ('000)	61.7	62.9	64.2	66.6	66.8	70.3	74.2	77.2	79.0
Clubs, pubs, taverns and bars ('000)	13.2	14.1	14.7	15.3	15.5	16.4	18.2	17.0	16.4
Rail transport ('000)	0.4	0.4	0.4	0.4	0.4	0.6	0.6	0.7	0.4
Road transport and transport equipment rental ('000)	3.5	2.9	3.2	3.1	3.0	3.3	2.8	2.6	2.9
Air, water and other transport ('000)	9.9	11.1	11.5	12.9	10.7	13.8	12.5	12.4	13.4
Travel agency and tour operator services ('000)	13.2	13.4	14.7	19.5	21.3	21.5	21.3	20.9	22.0
Cultural services ('000)	3.9	4.2	4.6	4.4	4.5	4.5	4.9	4.6	5.3
Casinos and other gambling services ('000)	1.0	1.2	1.4	1.3	1.7	1.6	1.9	2.1	1.4
Other sports and recreation services ('000)	8.2	8.8	9.9	10.1	9.4	9.6	9.1	9.1	9.9
Retail trade ('000)	52.5	56.0	59.0	62.6	61.5	60.4	55.9	57.1	56.9
Education and training ('000)	19.9	18.9	20.1	19.8	21.3	23.1	24.2	25.5	25.3
Total ('000)	230.3	240.7	251.4	262.4	262.7	269.6	271.3	272.5	276.2
All other industries ('000)	7.9	8.3	8.5	8.8	9.1	9.3	9.4	9.6	9.8
TOTAL TOURISM FEMALE EMPLOYED PERSONS ('000)	238.2	249.0	259.9	271.2	271.8	278.8	280.7	282.1	286.0
TOTAL FEMALE EMPLOYED PERSONS ('000)	4 267.3	4 408.5	4 569.6	4 709.7	4 859.2	4 984.8	5 029.7	5 150.6	5 232.9
TOURISM INDUSTRY SHARE OF TOTAL FEMALE EMPLOYED PERSONS (%)	5.6	5.6	5.7	5.8	5.6	5.6	5.6	5.5	5.5

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

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

NUMBER OF TOURISM TRIPS, By type of visitor by length of stay

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	'000	'000	'000	'000	'000	'000	'000	'000	'000
.....									
Domestic(a)									
Same day	137 900	131 151	131 601	139 539	140 745	144 725	155 075	156 287	168 847
Overnight	74 356	72 179	71 934	73 770	73 527	68 539	68 143	70 977	73 369
<i>Total domestic</i>	212 256	203 330	203 535	213 309	214 272	213 264	223 218	227 264	242 216
International(b)	5 057	5 408	5 484	5 641	5 629	5 541	5 692	5 907	5 982

(a) Source: Tourism Research Australia

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

SHORT-TERM ARRIVALS BY INTERNATIONAL VISITORS, By country of residence(a)

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	926.1	1 082.0	1 090.8	1 115.1	1 121.3	1 105.5	1 123.4	1 182.9	1 191.9
<i>Total(b)</i>	1 047.0	1 207.9	1 221.6	1 254.8	1 265.1	1 266.9	1 290.5	1 352.3	1 364.8
North-west Europe									
France	57.3	59.0	65.6	69.9	78.0	89.4	97.5	94.5	95.5
Germany	141.0	142.4	150.4	148.7	155.2	158.7	163.0	159.3	151.7
United Kingdom	686.4	699.5	709.3	733.3	686.3	658.7	652.8	632.4	597.2
<i>Total(b)</i>	1 138.8	1 162.7	1 195.0	1 229.4	1 204.6	1 182.5	1 193.3	1 154.0	1 113.5
Southern & Eastern Europe									
Italy	43.7	49.5	50.8	53.3	52.8	59.1	56.2	55.7	57.2
<i>Total(b)</i>	106.5	117.6	122.5	134.0	141.7	154.5	148.8	148.5	155.1
Middle East & North Africa									
<i>Total(b)</i>	56.4	68.2	73.4	82.7	92.6	105.3	111.3	114.0	113.8
Southeast Asia									
Indonesia	91.5	82.4	81.8	85.2	93.1	95.8	118.3	133.1	141.6
Malaysia	175.3	169.0	152.5	157.1	166.0	195.1	214.3	243.9	243.1
Singapore	252.6	267.5	251.8	263.5	266.5	278.4	289.9	315.5	319.8
Thailand	78.8	79.3	74.8	77.1	84.2	77.4	83.2	87.6	81.1
<i>Total(b)</i>	654.1	657.1	625.7	664.0	701.1	747.5	814.3	888.3	899.0
Northeast Asia									
China (excl. SARs and Taiwan)	216.9	274.4	292.3	338.4	375.2	358.1	393.9	499.9	583.4
Hong Kong (SAR of China)	132.2	148.9	158.8	153.1	146.7	149.9	154.3	169.6	168.8
Japan	687.5	700.8	674.4	610.2	521.2	403.7	363.9	364.1	344.4
Korea	215.8	237.3	242.9	270.8	236.2	193.2	196.1	204.6	199.3
Taiwan (Province of China)	103.9	103.8	102.3	92.3	85.0	92.8	88.1	82.1	90.2
<i>Total(b)</i>	1 358.5	1 467.6	1 473.5	1 467.7	1 368.0	1 202.0	1 200.7	1 325.1	1 391.3
Southern Asia									
<i>Total(b)</i>	71.3	79.0	99.3	112.1	135.0	151.9	166.1	184.3	194.6
The Americas									
United States of America	430.1	445.5	452.5	455.4	454.5	451.6	488.6	465.7	464.5
<i>Total(b)</i>	551.9	581.1	598.8	615.7	632.9	641.8	681.1	653.2	659.2
Sub-Saharan Africa									
<i>Total(b)</i>	72.4	66.9	74.0	80.6	88.1	88.5	86.1	87.1	90.4
Not stated									
	0.2	0.2	0.3	0.4	0.5	0.2	0.2	0.1	0.1
Total	5 057.2	5 408.3	5 484.1	5 641.2	5 629.4	5 541.1	5 692.4	5 906.9	5 981.9

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

(b) Includes other countries not mentioned.

SHORT-TERM DEPARTURES BY AUSTRALIAN RESIDENTS, By main destination(a)

	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12
	'000	'000	'000	'000	'000	'000	'000	'000	'000
Oceania & Antarctica									
New Zealand	739.2	843.0	836.3	883.3	913.4	955.3	1 064.0	1 058.3	1 117.4
<i>Total(b)</i>	1 057.0	1 192.9	1 211.1	1 267.4	1 347.2	1 406.4	1 584.4	1 633.3	1 721.3
North-west Europe									
France	58.0	66.6	73.1	76.4	99.8	87.2	104.4	117.3	134.6
Germany	44.9	51.6	65.7	58.9	64.7	63.9	66.6	77.2	83.1
United Kingdom	351.4	384.9	409.3	415.2	429.5	420.2	456.2	476.9	487.5
<i>Total(b)</i>	550.9	609.9	661.5	669.7	723.6	692.2	755.5	811.0	857.6
Southern & Eastern Europe									
Italy	84.2	91.3	102.7	107.6	120.3	114.8	121.1	141.1	154.0
<i>Total(b)</i>	222.6	247.5	270.8	285.9	307.9	292.8	314.0	350.2	375.3
Middle East & North Africa									
<i>Total(b)</i>	118.5	122.9	142.5	135.4	164.2	190.0	200.4	198.3	194.0
Southeast Asia									
Indonesia	271.1	344.0	241.9	231.4	328.1	436.0	652.8	806.1	910.8
Malaysia	126.0	155.5	163.9	172.5	185.6	205.2	239.2	254.8	257.2
Singapore	148.4	175.9	204.7	208.3	224.4	213.7	246.2	275.8	286.7
Thailand	153.8	187.0	246.4	331.7	403.0	378.4	432.0	486.7	600.7
<i>Total(b)</i>	894.4	1 093.0	1 096.2	1 217.7	1 446.0	1 552.0	1 929.1	2 236.1	2 514.6
Northeast Asia									
China (excl. SARs and Taiwan)	150.2	214.2	239.9	268.5	286.7	268.0	305.9	356.3	380.5
Hong Kong (SAR of China)	140.1	173.3	190.7	200.0	215.1	200.1	211.2	223.3	229.1
Japan	79.6	96.3	100.3	114.8	142.3	143.8	160.1	147.5	140.5
Korea	27.0	28.5	30.7	30.8	35.9	37.0	40.4	47.0	50.8
Taiwan (Province of China)	39.4	39.4	37.2	38.5	38.6	38.4	41.3	42.9	45.8
<i>Total(b)</i>	438.9	554.6	602.5	656.6	726.2	695.8	765.6	824.8	854.8
Southern Asia									
<i>Total(b)</i>	110.4	134.2	155.2	168.6	191.0	207.6	245.1	268.8	318.1
The Americas									
United States of America	342.1	394.5	437.8	450.7	491.9	500.0	634.6	750.5	819.8
<i>Total(b)</i>	456.7	531.8	581.2	603.3	658.3	667.1	818.0	942.1	1 020.1
Sub-Saharan Africa									
<i>Total(b)</i>	71.3	79.1	86.4	97.8	106.5	107.8	122.9	137.1	145.0
Not stated	16.1	25.3	27.6	24.7	28.6	31.5	35.6	41.3	39.5
Total	3 936.8	4 591.2	4 834.9	5 127.1	5 699.5	5 843.2	6 770.5	7 443.0	8 040.4

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

(b) Includes other countries not mentioned.

EXPLANATORY NOTES

INTRODUCTION

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

2 Implicitly, tourism is included in the core national accounts. The products purchased by visitors, and produced by suppliers, are all part of the economic activity measured in the national accounts. However, while all the products that are produced and consumed in meeting tourism demand are embedded in the core accounts, they are not readily apparent because 'tourism' is not identified as an industry or product in international statistical standards. In the Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 edition, underlying the Australian national accounts, industries are defined on the basis of the goods and services which they mainly produce. On the other hand, the tourism industry is defined according to the status of the consumer. That is, it is the characteristics of the consumer that determine whether the production is included within the scope of tourism.

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

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

INTERNATIONAL STANDARDS

5 The concepts and methods used in the Australian TSA are based on international standards developed by an Inter-Secretariat Working Group on Tourism Statistics comprised of the Organisation for Economic Co-operation and Development (OECD), the statistical arm of the Commission of the European Communities (Eurostat), the United Nations Statistics Division (UNSD), and the United Nations World Tourism Organisation (UNWTO). These standards are presented in the Tourism Satellite Account: Recommended Methodological Framework 2008. National statistical offices such as the ABS were consulted during the development and updating of the international standards. The standards are based on the System of National Accounts 2008 (SNA 2008), which is the prevailing international standard for national accounts statistics.

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

EXPLANATORY NOTES *continued*

DIRECT AND INDIRECT ECONOMIC IMPACTS

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

8 In the case of goods purchased by visitors, only the retail margin contributes to key tourism supply measures. This is because it is deemed that only the retailer has a direct relationship with the visitor and is therefore part of the tourism industry. The implication of this treatment is that the value added generated in the chain of supply of goods to visitors up to, but not including, the retail level will be treated as an 'indirect effect' of tourism consumption, while only the value added generated from retail trade activities provided to visitors will be considered as a direct effect.

9 Indirect effects of tourism consumption is a broader notion that includes downstream effects of tourism demand and is out of scope for the Australian TSA. For example, when a visitor buys a meal, indirect effects are generated for the food manufacturer, the transporter, the electricity company, etc., that provide the necessary inputs required to make the meal. To fully measure the indirect effects, account should also be taken of changes in incomes which may feed through to further changes in tourism demand. A full analysis of indirect effects is best done using economic modelling. Tourism Research Australia (TRA) have undertaken this work and their latest results are reported in the "Tourism's Contribution to the Australian Economy 1997-98 to 2010-11".

CONCEPTS OF TOURISM *Tourism*

10 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.

11 An important conceptual distinction concerns the difference between travel and tourism, and consequently between a traveller and a visitor. Travel is a broad concept which encompasses the activity of travellers and includes commuting to a place of work, migration and travel for business or leisure. A traveller is defined as:

'...someone who moves between different geographic locations, for any purpose and any duration.' (International Recommendations for Tourism Statistics 2008, para 2.4).

Visitors

12 The central statistical entity in tourism statistics is the 'visitor'. The scope of tourism in the international standards comprises the activity of visitors.

13 A visitor is defined in the international standards as:

'...a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.' (International Recommendations for Tourism Statistics 2008, para 2.9).

14 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.

15 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
- persons who are travelling between two parts of their usual environment.

EXPLANATORY NOTES *continued*

Types of visitors

16 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.

17 The one year rule for length of stay for an international visitor is consistent with the principle applied in determining residency in the balance of payments, which generally requires the length of stay in an economic territory to be less than one year to qualify as a non-resident. There are some categories of individuals though that are exceptions to this one year rule in the balance of payments, in particular international students, who continue to be resident in the territory in which they were resident prior to studying abroad even if their course of study exceeds a year. The approach adopted in the Australian TSA is to include as visitors all international students undertaking short term courses with an actual length of stay of less than one year. If a student stays longer than one year (ignoring short-term interruptions to their stay, for example at vacation break), their usual environment is deemed to be the school or university, and they do not fit the definition of a visitor. However, if they travel outside their usual environment, they are considered a visitor.

18 For the purposes of measuring direct tourism gross value added and direct 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.

Usual environment

19 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.

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

Tourism expenditure

21 Tourism expenditure covers actual expenditure by the visitor, or on behalf of the visitor, and is defined in the international standards as:

'...the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others.' (International Recommendations for Tourism Statistics 2008, para 4.2)

22 Consistent with the definition of visitors, tourism expenditure includes expenditure by visitors whose primary purpose is business, whether this is totally or partially paid by businesses or government. Expenditure before or after the trip is likewise included provided the expenditures are related to the trip, such as the digital printing of photos after they return home or the purchase of tourism single-purpose consumer durables in anticipation of trips (e.g. luggage or camping equipment). Consumer durables which are

EXPLANATORY NOTES *continued*

Tourism expenditure continued

purchased on a trip (e.g. motor vehicles) are also included, even though they are not mainly for use on trips. Since there is no reliable data source in Australia for acquisitions of valuables, this item is not included in the national accounts and is also excluded from tourism expenditure in the Australian TSA.

23 Expenditures by Australians travelling abroad on goods or services provided on Australian domestic territory, either before or after the trip, are included in tourism expenditure. In addition, outbound and inbound services provided by Australian international carriers are also included. All other expenditures by Australians while abroad are excluded from tourism expenditure, consumption and value added. These expenditures are classified as imports of goods and services.

Tourism consumption

24 Tourism consumption, as defined in the Australian TSA and the revised international standards, is broader in scope and also includes imputations for the consumption by visitors of certain services for which they do not make a payment. Imputed consumption included in the Australian TSA include:

- Services provided by one household to the visiting members of another household free of charge, including the value of goods such as food and purchased services provided by host family/friends
- Housing services provided by vacation homes on own account (imputed services of holiday homes deemed to be consumed by their visitor owners)
- Imputed values of non-market services provided directly to visitors such as public museums even though these may be provided free or at a price which is not economically significant.

25 In the Australian TSA, tourism consumption includes consumption by both domestic and international visitors. Domestic consumption is further split into that of households and business and government. This dissection is based on who incurred the expenditure rather than who actually paid. For example, a visitor may spend \$1,000 on a business trip, of which \$800 is reimbursed by the business. While the primary purpose of the trip is business, \$800 is recorded as business consumption, with the remaining \$200 reported as household consumption.

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

Direct tourism gross value added and direct tourism GDP

27 Direct tourism gross value added and direct 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.

28 Direct 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. Direct tourism gross value added is measured as the value of the output of tourism products by industries in a direct relationship with visitors 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. Direct 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.

29 SNA 2008 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.

EXPLANATORY NOTES *continued*

Direct tourism gross value added and direct tourism GDP continued

30 Direct 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 associated with the productive activity attributable to tourism. Direct tourism GDP will generally have a higher value than direct tourism value added. Direct tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While direct tourism GDP is useful in this context, the direct tourism gross value added measure should be used when making comparisons with other industries or between countries.

Gross fixed capital formation

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

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

CLASSIFICATIONS

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

Tourism related products

34 Tourism characteristic products are defined as those products which would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, core lists of tourism characteristic products, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. The core list of tourism characteristic products is consistent with the international classification of products, namely the Central Product Classification, Version 2 (CPC V2.0).

35 It is also recommended in the international TSA standards that country-specific tourism characteristic products are identified. In the Australian TSA, for a product to be a country-specific tourism characteristic product, at least 25 per cent of the total output of the product must be consumed by visitors.

36 Tourism connected products are those that are consumed by visitors but are not considered as tourism characteristic products. All products in the supply and use table not consumed by visitors are classified as 'all other goods and services' in the TSA.

37 See Appendix 1 for a correspondence between tourism related products in the Australian TSA, and products included in the CPC V2.0.

Tourism related industries

38 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. Under the international TSA standards, core lists of tourism characteristic industries, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. The core list of tourism characteristic industries is consistent with the newly revised international classification of industries, namely the International Standard Industrial Classification, Revision 4 (ISIC Rev. 4), which aligns closely with ANZSIC 2006.

EXPLANATORY NOTES *continued*

*Tourism related industries
continued*

39 In the Australian TSA, for an industry to be a country-specific tourism characteristic industry, at least 25 per cent of its output must be consumed by visitors. Whether or not an industry is classified as characteristic has no effect on total value added resulting from tourism, as the TSA measures the gross value added resulting from the production of products directly consumed by visitors, not the total gross value added generated by tourism related industries.

40 Tourism connected industries are those, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) to it, 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 'all other industries', though some of their products may be consumed by visitors and are included in the calculation of direct tourism gross value added and direct tourism GDP.

41 The following points are worth noting about the industry classifications for the TSA:

- whether or not an industry is classified as characteristic has no effect on total value added resulting from tourism
- for an industry to be tourism related it must serve the visitors themselves, that is, there must be a direct relationship between the provider of the product and the consumer. Producers of goods from the manufacturing industry that are not in direct contact with visitors will therefore not be included as a tourism related industry.

42 See Appendix 2 for a correspondence between tourism related industries and industries included in the ANZSIC.

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

44 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.

45 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 67 industries and 297 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.

46 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 direct tourism value added and direct tourism GDP.

TOURISM SATELLITE
ACCOUNT FRAMEWORK

EXPLANATORY NOTES *continued*

TOURISM SATELLITE ACCOUNT FRAMEWORK *continued*

47 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.

48 More details on the supply and use approach to constructing a TSA can be found in OECD's, "Measuring the Role of Tourism in OECD Economies". Readers who require more detailed information on supply and use tables should consult SNA 2008.

CALCULATING BENCHMARK TOURISM GROSS VALUE ADDED AND TOURISM GDP

49 The gross value added for an industry is derived as the gross output for that industry less the intermediate consumption required to produce that output. However, as the tourism industry is defined according to who purchases an industry's output rather than according to the nature of the output itself, tourism consumption is required in order to measure the tourism output of industries. For the current TSA time series, benchmark years are 2003–04, 2006–07 and 2009–10.

50 To calculate direct 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 internal tourism consumption for each tourism product
- remove product taxes and subsidies, margins and imports from internal tourism consumption of each product at purchasers' prices to derive internal tourism consumption at basic prices—this represents the domestic output consumed by visitors
- 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
- for each tourism product, identify the industries that have a direct relationship with visitors. In the case of the supply of goods, this will only include the industries that provide retail trade services. In the case of the supply of other margins (wholesale and transport margins), all industries are deemed to not have a direct relationship with visitors.
- apply the tourism product ratio to the output of each product for those industries that have a direct relationship with visitors to derive the direct 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 direct tourism gross value added at basic prices for each industry as direct tourism output less the intermediate consumption required to produce the direct tourism output, and sum for all industries in the economy. Direct tourism gross value added at basic prices is directly comparable to the value added for all other industries.

UPDATE METHODOLOGY

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

52 The following steps are used in the update years:

- derive an estimate of internal tourism consumption for each tourism product
- remove product taxes and subsidies, margins and imports from internal tourism consumption of each product at purchasers' prices to derive internal tourism consumption at basic prices—this represents the domestic output consumed by visitors

EXPLANATORY NOTES *continued*

UPDATE METHODOLOGY

continued

- remove supply of goods by producers that do not have a direct relationship with visitors (equal to the cost to retailers of domestic goods sold directly to visitors) using ratios from the benchmark TSA to derive direct tourism output
- allocate the direct tourism output of each tourism product to producing industry using ratios from the benchmark TSA
- sum the products produced by each tourism industry to derive the output for each tourism industry
- split industry output between value added and intermediate consumption using each industry's input-output ratios taken from the benchmark TSA.
- sum direct tourism gross value added for all industries to calculate the tourism industry's gross value added. Direct tourism GDP is derived by adding tourism net taxes on products.

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

DATA SOURCES

Tourism consumption data

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

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

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

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

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

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

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

61 For the 1997–98 TSA the imputation for non-market services provided by government utilised data on visitor numbers from Cultural Trends in Australia: A Statistical Overview, 1997 (cat. no. 4172.0), whilst the imputation for foreign exchange margins was derived using international visitors' expenditure data, and data for currency buy/sell rates. Estimates for later years are extrapolated using movements in government

EXPLANATORY NOTES *continued*

Tourism consumption data continued

final consumption expenditure on relevant products for the government imputation, and movements in the number of short term arrivals for the foreign exchange imputation.

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

Relationship with balance of payments tourism related services

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

64 In this publication information on Tourism Consumption by Australian Residents on Outbound Trips is presented. This table records the value of goods and services sourced from non-residents purchased by Australian residents in association with these trips. The difference in the estimates in this publication and the service debits memorandum item published in the balance of payments relate to: any transactions between residents and non-residents which do not relate to the value of tourism goods and services purchased within Australian economic territory; expenditure by student travellers on long term visas (as they do not meet the definition of a visitor); and payments to non-resident travel agencies for services provided outside Australian territory.

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

Industry data

66 While the supply and use tables provide 'control totals' for industry output of products and the inputs required to produce those products, in the benchmark TSA years of 2003–04, 2006–07 and 2009–10 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.

67 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 the 1997–98, 2000–01, 2003–04, 2006–07 and 2009–10 reference years to provide extra data for tourism characteristic industries. The ABS Economic Activity Survey (EAS), supplemented with taxation data, is the major source of data for the following industries: transport, automotive fuel, motor vehicle hire, travel agents, accommodation, cafes and restaurants, pubs and taverns, clubs, gambling industries and casinos.

EXPLANATORY NOTES *continued*

Industry data continued

68 As the TSA supply table is not updated for the extrapolated years, benchmark coefficients are carried through to the update estimates. Recently published TSA estimates have used benchmark coefficients for 2003–04 and 2006–07 applied to the time series. With the release of new benchmark data for 2009–10 new coefficients for 2006–07 were also produced and selected 2003–04 coefficients, which apply to all periods in the series prior to 2006–07, were revised. The 2009–10 coefficients are carried through to 2011–12 in this publication, and will continue to be used until the derivation of a new benchmark for the 2012–13 reference year due for release in April 2016.

Employment

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

70 Details by industry of employment, status in employment and gender, are collected in the Labour Force Survey (LFS) in the February, May, August and November months. Estimates of the number of total, full-time and part-time, and male and female tourism employed persons by industry 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. Alternative data sources were used for the accommodation, 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 in the benchmark years up to 2006–07 when available. Employment in these industries has been extrapolated using movements in the LFS for the updated years. However, there may be some downward bias in estimates for the tourism industries due to the timing of these collections, i.e., the LFS survey months exclude the major Christmas holiday period, and the employer survey data are provided as at a point in time, e.g. 30 June.

71 Part-time, full-time, male and female employment ratios are derived for each tourism characteristic and connected industry using LFS ratios and applying these ratios to the total number of tourism employed persons by industry. The underlying assumption is that the LFS distribution of part-time, full-time, male and female employment from within a given industry is consistent with the distribution of part-time, full-time, male and female employment within the tourism share of that particular industry.

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

Other visitor characteristics

DOMESTIC VISITORS

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

INTERNATIONAL ARRIVALS AND DEPARTURES

74 Data on international arrivals and departures (by country of origin or destination) were taken from the ABS publication Overseas Arrivals and Departures, Australia (cat. no. 3401.0).

EXPLANATORY NOTES *continued*

QUALITY OF ESTIMATES

75 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 direct 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.

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

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

78 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. However, errors resulting from the use of assumptions will tend to offset in the calculation of the broad aggregates such as direct tourism value added and direct tourism GDP.

79 In the extrapolated years the allocation of direct tourism gross output to producing industry and the derivation of direct tourism gross value added are based on relationships that applied in the benchmark years. In terms of earlier data in the time series (with a couple of exceptions with significant industry structural change during this time), the industry coefficients from 2003-04 are used back to 1997-98 and forward to 2006-07 (the following benchmark year). In compiling the 2009-10 benchmark the coefficients for the previous 2006-07 benchmark year, as well as the update years, were reviewed and adjusted as appropriate (as were some of the 2003-04 coefficients where necessary). From 2006-07 to 2009-10, industry coefficients from 2006-07 were used except for those industries where the structural change was significant enough to warrant smoothing of the coefficients between benchmarks. In the absence of such smoothing, data movement between 2008-09 (using 2006-07 coefficients) and 2009-10 would have been significant and resulted in a broken time series. The review of these coefficients for all years was required to reflect the significant revisions to the demand

EXPLANATORY NOTES *continued*

QUALITY OF ESTIMATES

continued

side data sourced from TRA in the NVS for expenditure by Australian visitors and the IVS for expenditure by international visitors. Further, there were also historical revisions and in the supply use tables underlying the 2011-12 release of the Australian System of National Accounts (ASNA). Various revisions to other source data including overseas arrivals and departures, balance of payments and labour force data were also included in this 2011-12 publication.

80 The underlying assumption of the three yearly benchmarking 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.

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

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

APPENDIX 1 TOURISM INDUSTRY CORRESPONDENCE

TOURISM RELATED INDUSTRIES

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

APPENDIX 1 - TOURISM INDUSTRY CORRESPONDENCE

<i>Characteristic and connected tourism industries</i>	<i>ANZSIC code</i>	<i>ANZSIC industry</i>
Accommodation	44	Accommodation
Ownership of dwellings	6711	Residential property operators
Cafes, restaurants and takeaway food services	451	Cafes, restaurants and takeaway food services
Clubs, pubs, taverns and bars	452	Pubs, taverns and bars
	453	Clubs (hospitality)
Rail transport	47	Rail transport
Taxi transport	4623	Taxi and other road transport
Other road transport	461	Road freight transport
	4621	Interurban and rural bus transport
	4622	Urban bus transport (including tramway)
Air, water and other transport	48	Water transport
	49	Air and space transport
	50	Other transport
Motor vehicle hiring	6611	Passenger car rental and hiring
Travel agency and tour operator services	722	Travel agency and tour arrangement services
Cultural services	89	Heritage activities
	90	Creative and performing arts activities
Casinos and other gambling services	92	Gambling activities
Sports and recreation services	91	Sports and recreation activities
Automotive fuel retailing	40	Fuel retailing
Other retail trade	39	Motor vehicle and motor vehicle parts retailing
	41	Food retailing
	42	Other store-based retailing
	43	Non-store retailing and retail commission based buying and/or selling
Education and training	80	Preschool and school education
	81	Tertiary education
	82	Adult, community and other education
All other industries		All other industries

APPENDIX 1 TOURISM INDUSTRY CORRESPONDENCE *continued*

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 correspond with the tourism related industries in the monetary tables.

TOURISM EMPLOYMENT INDUSTRIES

<i>Tourism employment industries</i>	<i>Tourism related industries</i>
Accommodation	Accommodation
Cafes, restaurants and takeaway food services	Cafes, restaurants and takeaway food services
Clubs, pubs, taverns and bars	Clubs, pubs, taverns and bars
Rail transport	Rail transport
Road transport and motor vehicle hiring	Taxi transport; other road transport; motor vehicle hiring
Air, water and other transport	Air, water and other transport
Travel agency and tour operator services	Travel agency and tour operator services
Cultural services	Cultural services
Casinos and other gambling services	Casinos and other gambling services
Sports and recreation services	Other sports and recreation services
Retail trade	Other retail trade; automotive fuel retailing
Education and training	Education and training
All other industries	All other industries

APPENDIX 2 TOURISM PRODUCT CORRESPONDENCE

TOURISM RELATED PRODUCTS

The following table shows the correspondence between tourism related products in the Australian Tourism Satellite Account and products in the Central Product Classification, Version 2 (CPC V2.0).

APPENDIX 2 - TOURISM PRODUCT CORRESPONDENCE

<i>Characteristic and connected tourism products</i>	<i>CPC Code</i>	<i>CPC description</i>
Accommodation services	631	Accommodation services for visitors
	632	Other accommodation services for visitors and others
Actual and imputed rent on vacation homes	72111	Rental or leasing services involving own or leased residential property
Takeaway and restaurant meals	633	Food serving services
	634	Beverage serving services
Taxi fares	64115	Taxi services
Local area passenger transportation	641	Local transport and sightseeing transportation services of passengers (except 64115 taxi services)
Long distance passenger transportation	642	Long distance transport services of passengers
Motor vehicle hire and lease	73111	Leasing or rental services concerning cars and light vans without operator
Travel agency and tour operator services	855	Travel arrangement, tour operator and related services (except 8553 other reservation services)
Recreational, cultural and sporting services	9622	Performing arts event production and presentation services
	963	Services of performing and other artists
	964	Museum and preservation services
	9652	Sports and recreational sports facility operation services
	9659	Other sports and recreational sports services
	966	Services of athletes and related support services
	9691	Amusement park and similar attraction services
	9699	Other recreation and amusement services n.e.c.
Gambling and betting services	9692	Gambling and betting services
Shopping (including gifts and souvenirs)	28	Knitted or crocheted fabrics; wearing apparel
	29	Leather and leather products; footwear
	322	Books, in print
	323	Newspapers and periodicals, daily, in print
	324	Newspapers and periodicals, other than daily, in print
	325	Printed maps; music, printed or in manuscript; postcards, greeting cards, pictures and plans
	327	Registers, account books, notebooks, letter pads, diaries and similar articles, blotting-pads, binders, file covers, forms and other articles of stationery of paper or paperboard
	353	Soap, cleaning preparations, perfumes and toilet preparations
	381	Furniture
	382	Jewellery and related articles
	383	Musical instruments
	384	Sports goods
	385	Games and toys
	448	Domestic appliances and parts thereof
	47	Radio, television and communication equipment and apparatus
	483	Optical instruments and photographic equipment, and parts and accessories thereof
	484	Watches and clocks, and parts thereof
	3694	Tableware, kitchenware, other household articles and toilet articles, of plastics
	3722	Ceramic household and ornamental articles
	32192	Envelopes, letter cards, plain postcards and correspondence cards of paper or paperboard; boxes, pouches, wallets and writing compendiums, of paper or paperboard, containing paper stationery
	32193	Toilet paper, handkerchiefs, towels, serviettes, napkins for babies, tampons, and similar household, sanitary or hospital articles, and articles of apparel, of paper pulp, paper, cellulose wadding or webs of cellulose fibres

APPENDIX 2 TOURISM PRODUCT CORRESPONDENCE *continued*

APPENDIX 2 - TOURISM PRODUCT CORRESPONDENCE *continued*

<i>Characteristic and connected tourism products</i>	<i>CPC Code</i>	<i>CPC description</i>
	37193	Glassware of a kind used for table, kitchen, toilet, office, indoor decoration or similar purposes (except bottles, jars and the like, of glass, and ornaments of lamp-worked glass)
	38921	Umbrellas, sun-umbrellas, walking-sticks, seat-sticks, whips, riding-crops and the like
	38997	Imitation jewellery
	42996	Statuettes and other ornaments of base metal; photograph, picture or similar frames of base metal; mirrors of base metal
Food products	21	Meat, fish, fruit, vegetables, oils and fats
	22	Dairy products and egg products (part)
	23	Grain mill products, starches and starch products; other food products
Alcoholic beverages and other beverages	24	Beverages
	22	Dairy products and egg products (part)
Motor vehicles, caravans, boats, etc	494	Pleasure and sporting boats
	49113	Motor cars and other motor vehicles principally designed for the transport of persons (except public-transport type vehicles, vehicles specially designed for travelling on snow, and golf cars and similar vehicles)
	4922	Trailers and semi-trailers; containers
Fuel (petrol, diesel)	3331	Motor spirit (gasolene), including aviation spirit
	3336	Gas oils
	3337	Fuel oils n.e.c.
Repair and maintenance of motor vehicles	36111	New pneumatic tyres, of rubber, of a kind used on motor cars
	36112	New pneumatic tyres, of rubber, of a kind used on motorcycles or bicycles
	36113	Other new pneumatic tyres, of rubber
	3612	Retreaded pneumatic tyres, of rubber
	4641	Primary cells and primary batteries
	87141	Maintenance and repair services of motor vehicles
Education Services	92	Education services
Other tourism goods and services	250	Tobacco products
	352	Pharmaceutical products
	681	Postal and courier services
	6743	Parking lot services
	7132	Accident and health insurance services
	7133	Other non-life insurance services (excluding reinsurance services)
	7142	Accident and health reinsurance services
	7143	Other non-life reinsurance services
	7321	Leasing or rental services concerning televisions, radios, video cassette recorders and related equipment and accessories
	7322	Leasing or rental services concerning video tapes and disks
	8553	Other reservation services
	838	Photography services and photographic processing services
	841	Telephony and other telecommunications services
	842	Internet telecommunications services
	843	On-line content
	931	Human health services
	971	Washing, cleaning and dyeing services
	972	Beauty and physical well-being services

GLOSSARY

Basic price	The amount receivable by the producer from the purchaser for a unit of a good or service produced as output, minus any tax payable plus any subsidy receivable, on that unit as a consequence of its production or sale; it excludes any transport charges invoiced separately by the producer. See also Economically significant price and Purchasers' price.
Business and government tourism consumption	Also referred to as internal tourism consumption by domestic business and government visitors. Consists of the tourism consumption by resident businesses or governments on tourism related products within Australia. See also Tourism consumption and Internal tourism consumption.
Compensation of employees	The total remuneration, in cash or in kind, payable by an enterprise to an employee in return for work done by the employee during the accounting period. It is further classified into two sub-components: wages and salaries; and employers' social contributions. Compensation of employees is not payable in respect of unpaid work undertaken voluntarily, including the work done by members of a household within an unincorporated enterprise owned by the same household. Compensation of employees excludes any taxes payable by the employer on the wage and salary bill (e.g. payroll tax). See also Employers' social contributions and Wages and salaries.
Current prices	Estimates are valued at the prices of the period to which the observation relates. For example, estimates for 2002–03 are valued using 2002–03 prices. This contrasts to chain volume measures where the prices used in valuation refer to the prices of the previous year.
Direct tourism gross domestic product (GDP)	Is direct tourism gross value added plus net taxes on products that are attributable to the tourism industry (tourism net taxes on products). Direct tourism GDP will generally have a higher value than direct tourism value added. Direct 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 direct tourism gross value added measure should be used when making comparisons with other industries or between countries. See also Direct tourism gross value added and Tourism net taxes on products.
Direct tourism gross value added	The value of direct tourism output at basic prices, 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 also Direct tourism output and Direct tourism GDP.
Direct tourism output	The value of goods and services, at basic prices, which are consumed by visitors and produced in Australia by industries in a direct relationship with visitors. See also Basic prices and Direct tourism gross value added.
Domestic tourism consumption	Consists of the tourism consumption by resident visitors on tourism related products within Australia. It is the sum of household tourism consumption and business and government tourism consumption. See also Tourism consumption; Internal tourism consumption; Business and government tourism consumption; Household tourism consumption.
Economically significant prices	Prices which have a significant influence on both the amounts producers are willing to supply and the amounts purchasers' wish to buy. See also Basic price and Purchasers' price.
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); or■ worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers); or

GLOSSARY *continued*

Employed person <i>continued</i>	<ul style="list-style-type: none">■ were employees who had a job but were not at work and were: away from work for less than four weeks up to the end of the reference week; or away from work for more than four weeks up to the end of the reference week and received pay for some or all of the four week period to the end of the reference week; or away from work as a standard work or shift arrangement; or on strike or locked out; or on workers' compensation and expected to return to their job; or■ were employers or own account workers, who had a job, business or farm, but were not at work.
Employers' social contributions	Payments by employers which are intended to secure for their employees the entitlement to social benefits should certain events occur, or certain circumstances exist, that may adversely affect their employees' income or welfare – namely work-related accidents and retirement.
Exports of goods and services	The value of goods exported and amounts receivable from non-residents for the provision of services by residents.
Final consumption expenditure – general government	Government final consumption expenditure is current expenditure by general government bodies on services to the community such as defence, education, and public order and safety less any explicit charges for these services. If these are provided free of charge or at charges which cover only a small proportion of costs, the government is considered to be the consumer of its own output. This output has no directly observable market value, and so it is valued in the national accounts at its cost of production. It also includes the value of the portion of market output purchased by the General Government sector on behalf of beneficiaries.
Final consumption expenditure – households	Net expenditure on goods and services by persons and expenditure of a current nature by private non-profit institutions serving households. This item excludes expenditures by unincorporated businesses and expenditures on assets by non-profit institutions (included in gross fixed capital formation). Also excluded is expenditure on maintenance of dwellings (treated as intermediate expenses of private enterprises), but personal expenditure on motor vehicles and other durable goods and the imputed rent of owner-occupied dwellings are included. The value of 'backyard' production (including food produced and consumed on farms) is included in household final consumption expenditure and the payment of wages and salaries in kind (e.g. food and lodging supplied free to employees) is counted in both household income and household final consumption expenditure.
Full-time workers	Employed persons who usually worked 35 hours or more a week (in all jobs) and those who, although usually working fewer than 35 hours a week, worked 35 hours or more during the reference week. See also Part-time workers.
Gross domestic product (GDP)	Is the total market value of goods and services produced in Australia within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. Thus gross domestic product, as here defined, is 'at market prices'. It is equivalent to gross national expenditure plus exports of goods and services less imports of goods and services. Farm product is that part of gross domestic product which arises from production in agriculture and services to agriculture. It is equivalent to the value added of ANZSIC 06 subdivision 01 'Agriculture' plus taxes less subsidies on products primary to this subdivision. Non-farm product arises from production in all other industries.
Gross fixed capital formation	Expenditure on fixed assets broken down into dwellings, non-dwelling construction, machinery and equipment, cultivated biological assets, intellectual property products and ownership transfer costs. The machinery and equipment category includes plant, machinery, equipment, vehicles, etc. Expenditure on repair and maintenance of fixed assets is excluded, being chargeable to the production account. Additions to fixed assets are regarded as capital formation. Also included is compensation of employees and other costs paid by private enterprise in connection with own-account capital formation.

GLOSSARY *continued*

Gross fixed capital formation <i>continued</i>	Expenditure on dwellings, non-dwelling construction, and machinery and equipment is measured as expenditure on new and second-hand assets, less sales of existing assets. Cultivated biological assets includes livestock and orchard growth. Along with Computer software, Mineral and petroleum exploration and Artistic originals, Research and development is now included in the intellectual property products asset type. Ownership transfer costs comprise of stamp duty, real estate agents' fees and sales commissions, conveyancing fees and miscellaneous government charges.
Gross mixed income of unincorporated enterprises	The surplus or deficit accruing from production by unincorporated enterprises. It includes elements of both compensation of employees (returns on labour inputs) and operating surplus (returns on capital inputs).
Gross operating surplus	The operating surplus accruing to all enterprises, except unincorporated enterprises, from their operations in Australia. It is the excess of gross output over the sum of intermediate consumption, compensation of employees, and taxes less subsidies on production and imports. It is calculated before deduction of consumption of fixed capital, dividends, interest, royalties and land rent, and direct taxes payable, but after deducting the inventory valuation adjustment. Gross operating surplus is also calculated for general government and it equals general government's consumption of fixed capital.
Gross value added	The value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries. See also Intermediate consumption and Output.
Household tourism consumption	Consists of the tourism consumption by resident households on tourism related products within Australia. See also Tourism consumption and Internal tourism consumption.
Imports of goods and services	The value of goods imported and amounts payable to non-residents for the provision of services to residents.
Imputed tourism consumption	Consists of imputations made for the consumption by visitors of certain goods and services for which they do not make a payment. Imputation is confined to a small number of cases where a reasonably satisfactory basis for the valuation of the implied transaction is available, and where their inclusion is consistent with the production boundary in the core national accounts.
Input-output table	An input-output table is a means of presenting a detailed analysis of the process of production and the use of goods and services (products) and the income generated in the production process; they can be either in the form of (a) supply and use tables or (b) symmetric input-output tables.
Intermediate consumption	Consists of the value of the goods and services used as inputs by a process of production, excluding compensation of employees and the consumption of fixed capital. See also Gross value added.
Internal tourism consumption	Consists of all tourism consumption of visitors, both resident and non-resident, within Australia. It is the sum of domestic tourism consumption and international tourism consumption. See also Tourism consumption; Domestic tourism consumption; International tourism consumption.
International tourism consumption	Also referred to as internal tourism consumption by international visitors. Consists of the tourism consumption within Australia by non-residents on tourism related products. See also Tourism consumption; Internal tourism consumption; Domestic tourism consumption.
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 invoiced separately by the producer in the delivery of a good.

GLOSSARY *continued*

Net taxes on products	Also referred to as taxes less subsidies on products. A tax or subsidy on a product is payable per unit of a good or service. The tax or subsidy may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax or subsidy on a product usually becomes payable when the product is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation. See also Other taxes on production and Taxes less subsidies on production and imports.
Other taxes on production	Consist 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 Taxes less subsidies on production and imports.
Outbound tourism consumption	Also referred to as tourism imports. Consists of the tourism consumption by resident visitors outside of Australia while on an international trip. See also Tourism consumption.
Output	This consists of those goods and services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use. See also Gross value added.
Part-time workers	Employed persons who usually worked fewer than 35 hours a week (in all jobs) and either did so during the reference week or were not at work during the reference week. See also Full-time workers.
Purchasers' price	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 Basic price and Economically significant price.
Taxes less subsidies on production and imports	Defined as 'taxes on products' plus 'other taxes on production' less 'subsidies on products' less 'other subsidies on production'. The taxes do not include any taxes on the profits or other income received by an enterprise. They are payable irrespective of the profitability of the production process. They may be payable on the land, fixed assets or labour employed in the production process, or on certain activities or transactions. See also Other taxes on production and Net taxes on products.
Tourism	Comprises the activities of visitors. See also Visitor.
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. Under the international TSA standards, core lists of tourism characteristic industries, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. In the Australian TSA, for an industry to be a country-specific tourism characteristic industry, at least 25 per cent of its output must be consumed by visitors.
Tourism characteristic products	These are defined in the international TSA standards as those products which would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, core lists of tourism characteristic products, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international

GLOSSARY *continued*

Tourism characteristic products <i>continued</i>	comparison. It is also recommended in the international TSA standards that country-specific tourism characteristic products are identified. In the Australian TSA, for a product to be a country-specific tourism characteristic product, at least 25 per cent of the total output of the product must be consumed by visitors.
Tourism connected industries	Are those, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of direct tourism gross value added and direct 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	Consists of tourism expenditure plus imputed consumption by resident and non-resident visitors on tourism related products, including those sold at prices that are not economically significant. See also Tourism expenditure.
Tourism expenditure	Consists of the amount paid by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination. See also Tourism consumption.
Tourism industry ratio	This is the proportion of the total value added of an industry which is related to tourism.
Tourism net taxes on products	Consists of taxes paid less subsidies received on tourism related products which is attributable to productive activity of tourism related industries that are in a direct relationship with visitors. In the case of goods purchased by visitors, only the net taxes attributable to the value of retail trade services on those goods will be included.
Tourism product ratio	This is the proportion of the total supply of a product which is consumed by visitors.
Tourism trip	This is defined in the international TSA standards as those trips which are taken by visitors.
Usual environment	This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study and other places frequently visited. The usual environment criteria has two dimensions. Frequency means places that are visited on a routine basis (at least once a week) are considered part of a 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 'taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited'.
Wages and salaries	Consist of amounts payable in cash including the value of any social contributions, income taxes, fringe benefits tax, etc., payable by the employer even if they are actually withheld by the employer for administrative convenience or other reasons and paid directly to social insurance schemes, tax authorities, etc., on behalf of the employee. Wages and salaries may be paid as remuneration in kind instead of, or in addition to, remuneration in cash. Separation, termination and redundancy payments are also included in wages and salaries. Wages and salaries are also measured as far as possible on an accrual rather than a strict cash basis. See also Employers' social contributions and Compensation of employees.

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