



Australian Government
Tourism Research Australia

State Tourism Satellite Accounts 2011–12



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Acknowledgments

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Contents

Acknowledgments.....	ii
Foreword.....	v
Executive summary	vi
Introduction.....	1
Trends in state tourism aggregates	5
Tourism consumption	8
Tourism GVA.....	11
Tourism employment	15
Conclusion.....	18
Appendix A – Key tables	19
Explanatory notes.....	46
Glossary.....	50
References	53

Tables

Table 1: Comparisons of TSA framework and I-O modelling concepts.....	2
Table 2: Direct tourism’s share of national GVA and GDP.....	5
Table 3: State/territory contribution to total tourism consumption, 2011–12.....	9

Figures

Figure ES1: Direct and total flow-on tourism GVA (national)	vii
Figure ES2: Direct and total flow-on of tourism employment (national)	viii
Figure ES3: Regional shares of GVA in total national GVA.....	ix
Figure ES4: Annual changes in regional tourism expenditure, 2011–12.....	x
Figure ES5: State and territory tourism GVA, 2011–12	x
Figure ES6: State and territory tourism employment, 2011–12	xi
Figure 1: Summary chart.....	4
Figure 2: State/territory tourism GVA share of Australia’s total direct tourism GVA.....	6
Figure 3: Domestic and international travel’s share of tourism consumption, 2011–12	10
Figure 4: Domestic and international travel’s share of direct tourism GVA, 2011–12.....	12
Figure 5: Contribution of segments to domestic direct tourism GVA, 2011–12	12

Figure 6: Contribution of direct tourism GVA to each state economy, 2006–07 and 2011–12	14
Figure 7: Contribution of direct tourism employment to each state economy, 2006–07 and 2011–12	16
Figure 8: Contribution of industries to direct tourism employment, 2011–12	17

Appendix A - Key tables

Table 1: Key direct tourism aggregate results, 2006–07 to 2011–12	19
Table 2: Direct tourism output by tourism category, 2006–07 to 2011–12	21
Table 3: Direct tourism GVA by tourism category, 2006–07 to 2011–12	23
Table 4: Direct tourism employment, 2006–07 to 2011–12.....	25
Table 5: Tourism consumption by tourism category, 2006–07 to 2011–12	26
Table 6: Direct tourism output by industry—basic prices and state share of total, 2011–12	28
Table 7: Direct tourism GVA by industry—state share of total, 2011–12	30
Table 8: Direct tourism employment by industry and state share, 2011–12.....	32
Table 9: Tourism consumption by product—purchasers’ prices and state share of total, 2011–12	34
Table 10: Indirect contribution of tourism, 2006–07 to 2011–12	36
Table 11: Total effects of tourism consumption, 2006–07 to 2011–12	38
Table 12: State totals of key economic aggregates, 2006–07 to 2011–12	40
Table 13: Key economic aggregates by state and tourism share, 2006–07 to 2011–12	41
Table 14: Industry shares of key economic aggregates by state, 2011–12	43
Table 15: Key direct tourism aggregate results, domestic, 2006–07 to 2011–12	44
Table 16: Key direct tourism aggregate results, international, 2006–07 to 2011–12	45

Foreword

Welcome to Tourism Research Australia's (TRA) State Tourism Satellite Accounts publication for 2011–12.

The Australian Bureau of Statistics (ABS) produces the national Tourism Satellite Account (TSA), which is an expansion of Australia's national accounts. The TSA allows the economic aspects of tourism—such as the size of the sector, and its contribution to the economy—to be examined and analysed, for the benefit of the tourism industry and policy makers. However, the national TSA only focuses on the direct contribution of the tourism sector at the national level, it does not provide a complete picture of tourism's contribution to the economy of each state and territory. To bridge this gap, TRA produces a state-based TSA that covers both the direct and indirect contribution of tourism sectors.

Over the period 2006–07 to 2011–12, the tourism sector has shown a marginal decrease in its size relative to the whole economy. The share of direct tourism Gross Domestic Product (GDP) of total national GDP declined from 3.0 per cent in 2006–07 down to 2.8 per cent in 2011–12. It is important to note that the reduced GDP share of the sector does not mean the tourism sector has been shrinking. In contrast, the sector grew over time, but not as strongly as other sectors such as mining and professional, scientific and technical services.

In 2011–12, total tourism consumption increased by \$6.8 billion from the previous year to a total of \$106.6 billion. Direct tourism GDP increased to \$41.0 billion—up by \$2.1 billion from the previous year—and this direct tourism GDP generated a total flow-on effect of \$87.3 billion of GDP through all industries in the economy. The tourism sector employed 531,900 people directly, and through all other sectors, tourism generated a total of 908,434 jobs, or equivalent to 8 per cent of total national employment.

Interestingly, data at the regional level for 2011–12 show that of the \$6.8 billion increase in tourism consumption, the main contributions came from Queensland (\$3.3 billion), Western Australia (\$1.5 billion) and Victoria (\$1.4 billion). The increases in tourism demand in the mining states were offset by the reduced regional share of other regions, in particular New South Wales—Australia's largest tourism market.

The changes to tourism in 2011–12, particularly in Queensland and Western Australia, highlight a new and positive phase for tourism in Australia. These changes indicate that—together with other non-mining states—the mining states seem to have regained their momentum to contribute to the growing tourism sector. Sustained growth in these states should provide opportunities that influence investment and diversification for longer term tourism opportunities.

Dr. Leo Jago
Chief Economist and General Manager
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Executive summary

Tourism Research Australia (TRA) supplements the national Tourism Satellite Account (TSA) published by the Australian Bureau of Statistics (ABS) with a similar set of TSA data expanded for all states and territories. The state TSAs go beyond the scope of the national TSA by providing state measures for both the direct and indirect contribution of tourism, and the resulting total contribution of tourism to the state and national economies. This provides a more complete picture of the contribution of the tourism sector to the Australian economy.

Within Australia, TSA data vary from state to state, reflecting the different tourism offerings available across its regions. This makes compiling state-based TSAs particularly important, as they provide a clearer indication of the similarities and differences in how tourism contributes to each state's economy. Australia is one of only a few countries that compile a Tourism Satellite Account at the state level on a regular basis.

This 2011–12 state TSA release incorporates several revisions to the input data, from both the national TSA and TRA's revised National and International Visitor Survey data.

The TSA data for 2011–12 show the following results for both the tourism sector as a whole and Australia's states and territories:

Australia's tourism sector

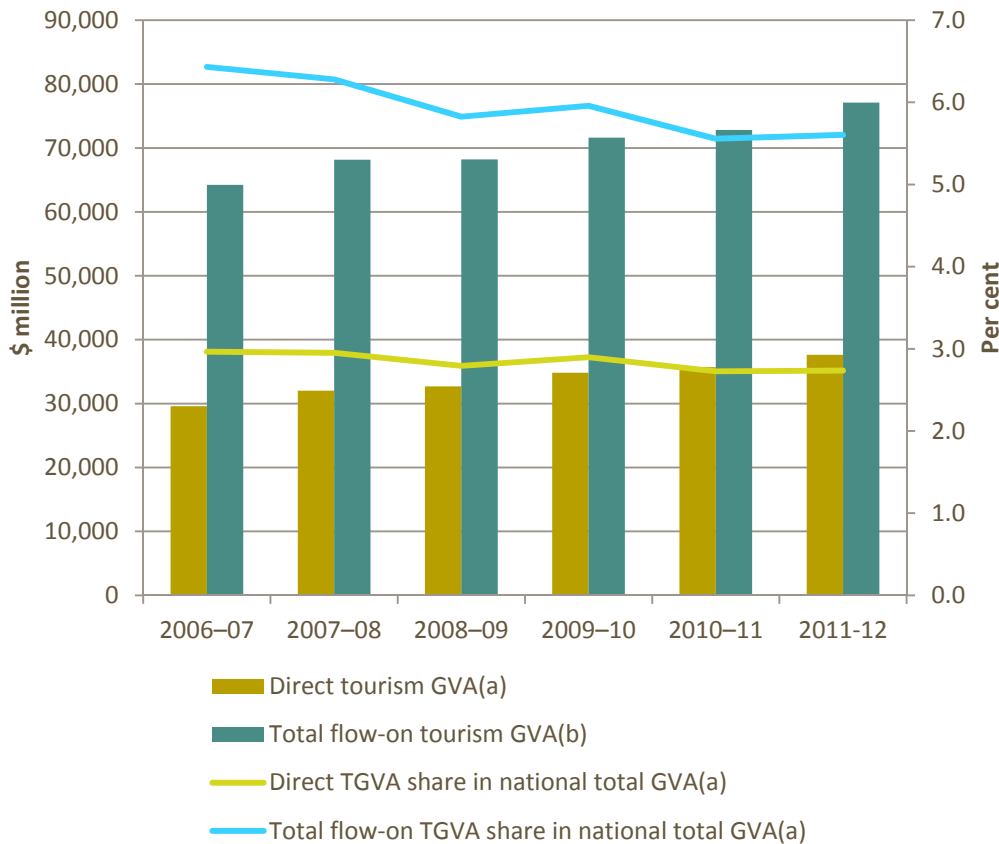
Tourism consumption

- Tourism consumption in nominal terms amounted to **\$106.6 billion**, an increase of \$6.8 billion (or 6.8 per cent) compared to 2010–11.

Tourism Gross Value Added (GVA) and Gross Domestic Product (GDP)

- The total consumption directly generated **\$37.6 billion** of GVA and contributed **\$41.0 billion** of GDP to the whole economy.
- Compared to the level in 2006–07, the tourism sector has achieved annual average growth of 4.9 per cent in GVA.
- Combining direct and indirect contributions, the tourism sector contributed **\$77.1 billion** of GVA and **\$87.3 billion** of GDP.
- As seen in Figure ES1, although tourism GVA (both the direct and total flow-on) has increased over the period 2006–07 to 2011–12, the increases in GVA were not as strong as the increase in national total GVA. Consequently, the shares of tourism GVA declined over the period.
- However, in 2011–12 alone, the strong growth in both GVA and GDP from the previous year (approximately 5.3 per cent in nominal terms) has reversed the direction of the declining trends marginally (Figure ES1).

Figure ES1: Direct and total flow-on tourism GVA (national)

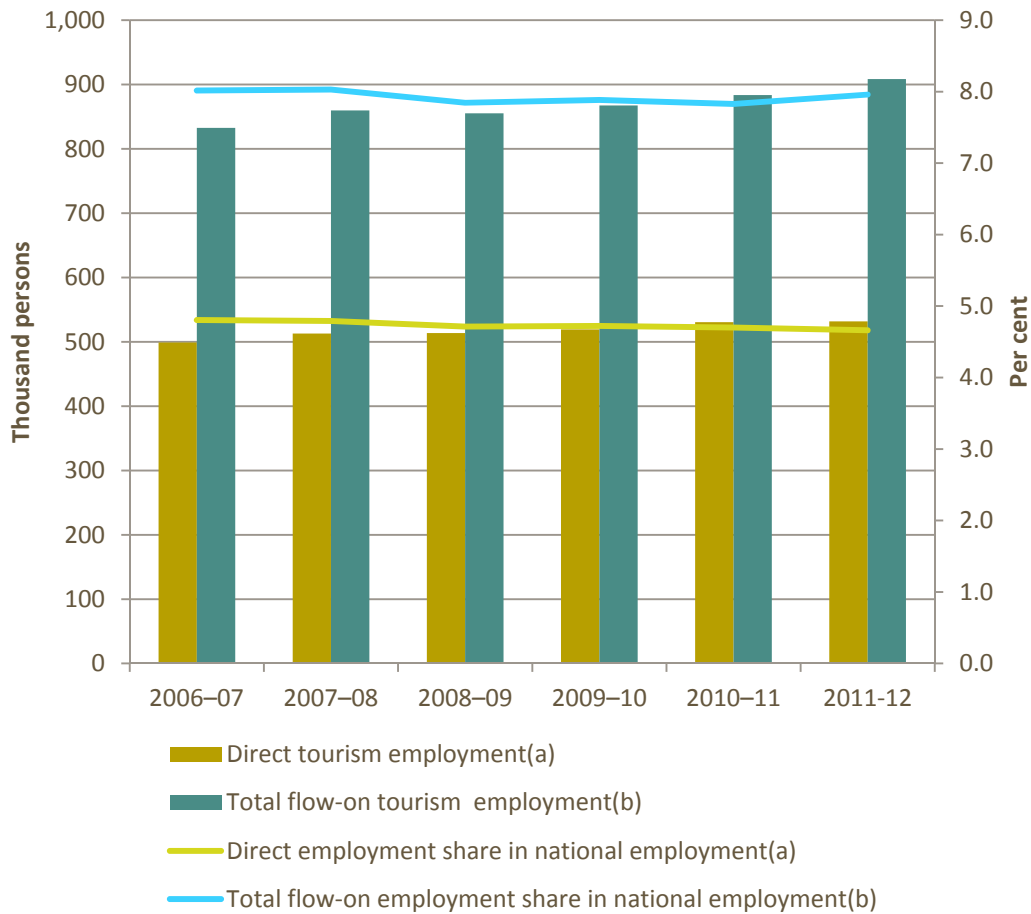


Sources: (a) ABS (2013)
(b) TRA's estimates

Tourism employment

- Combining direct and indirect contributions, tourism employed **908,434 people**.
- Compared to the level in 2006-07, the tourism sector has achieved average annual growth of 1.3 per cent in employment.
- Direct tourism employment has increased gradually over the period 2006-07 to 2011-12.
- The contribution of tourism in terms of total flow-on tourism employment has changed more significantly over the same period, reflecting the growing impacts of the sector over time.
- However, in relation to the whole economy, the size of the tourism sector has decreased marginally, as other non-tourism related industries (mining in particular) have grown much faster (Figure ES2).
- Despite this, the change in 2011-12 from the previous year reflects a new direction for the tourism sector.

Figure ES2: Direct and total flow-on of tourism employment (national)



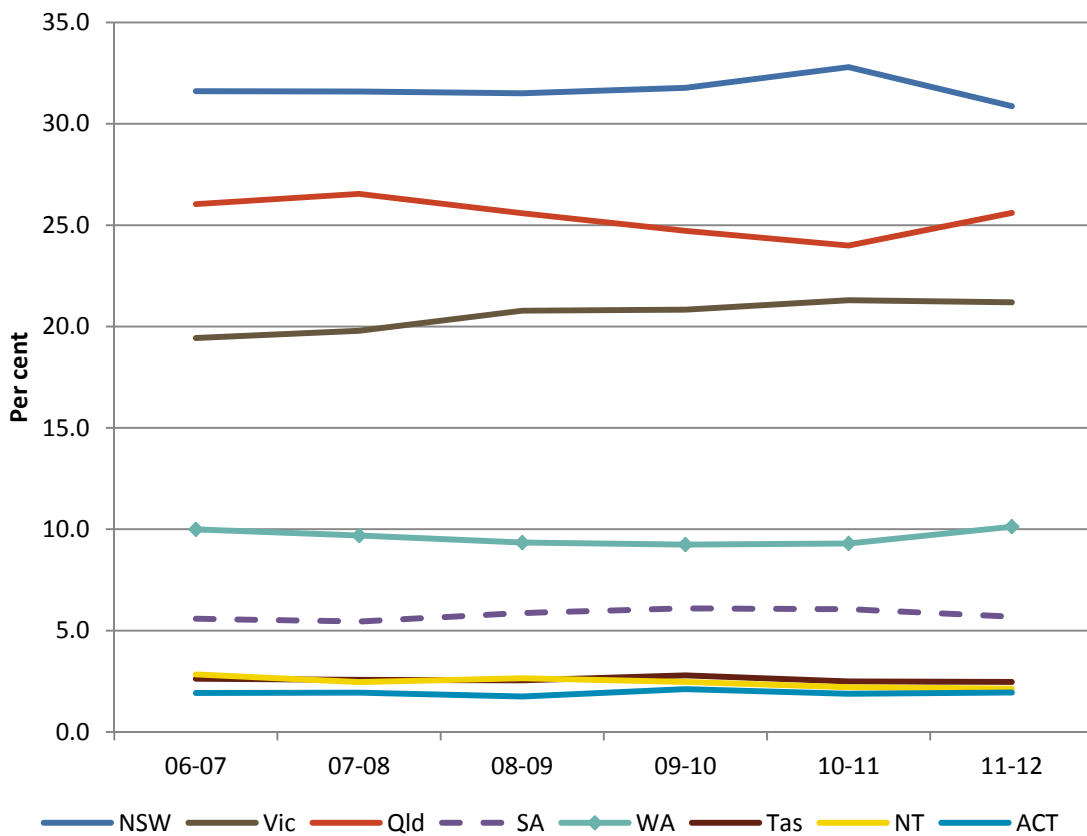
Sources: (a) ABS (2013)
(b) TRA's estimates

Australia's states and territories

- At the state level, there have been changes in the composition of the regional contributions to the tourism sector over the period 2006–07 to 2011–12. Figure ES3 illustrates the regional tourism GVA shares of total tourism GVA.
- On average, there are three distinct groups of states contributing to the aggregate national tourism sector with the largest being New South Wales, Victoria and Queensland, which collectively contribute 77.6 per cent towards total national tourism GVA.
- The second group includes Western Australia and South Australia. In total, these two states contribute approximately 15.4 per cent towards total national GVA.
- The third group includes Tasmania, the Northern Territory and the Australian Capital Territory, with a combined contribution of around 7.0 per cent.

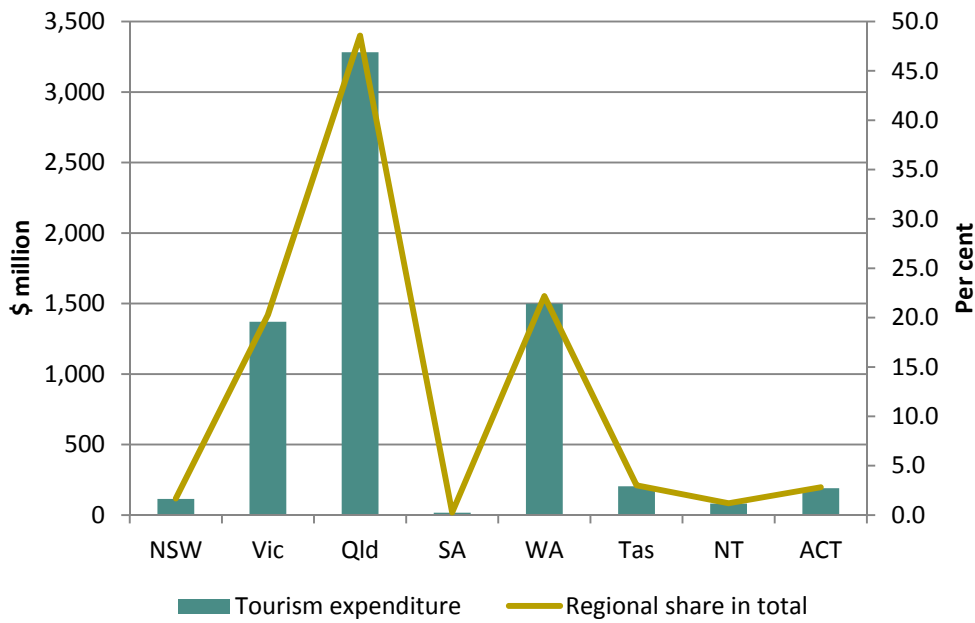
- Over the period 2006–07 to 2011–12, the mining boom showed clear and similar impacts on the tourism sectors in Queensland, Western Australia and the Northern Territory, as competition for flights and accommodation between mining workers and tourists increased. Queensland was further impacted by the floods in 2011–12.
- The regional tourism GVA shares of total national tourism GVA declined in Queensland, Western Australia and the Northern Territory over the period 2006–07 to 2010–11, while the regional GVA shares of New South Wales, Victoria and South Australia increased over the same period. This is an example of the ‘substitution’ effect, whereby tourists shift away from traditional destinations. In this case, the shift was most likely due to the combination of the higher costs associated with visiting Queensland, Western Australia and the Northern Territory, and the shortage in the supply of air transport and accommodation in these regions due to the mining boom.
- In 2011–12, both Queensland and Western Australia regained their respective shares. The increases in their shares were offset by the reduced shares mainly from New South Wales and marginally from South Australia.
- Of the \$6.8 billion annual increase in tourism expenditure in 2011–12 compared to 2010–11, the majority was contributed by Queensland, Western Australia and Victoria (Figure ES4).

Figure ES3: Regional shares of GVA in total national GVA



Source: TRA's estimates

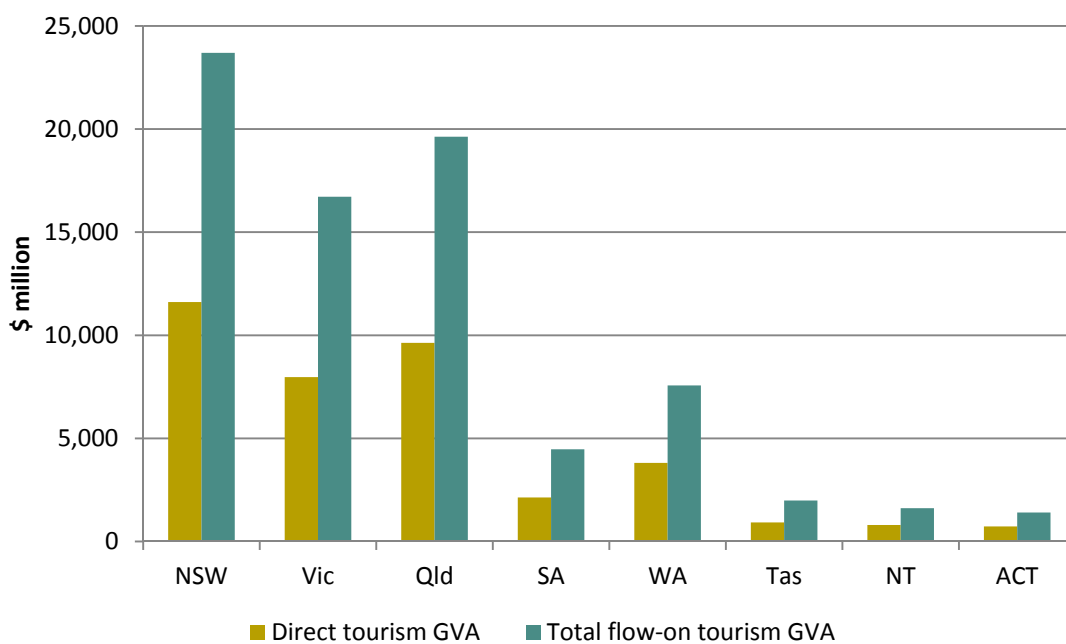
Figure ES4: Annual changes in regional tourism expenditure, 2011-12



Source: TRA's estimates

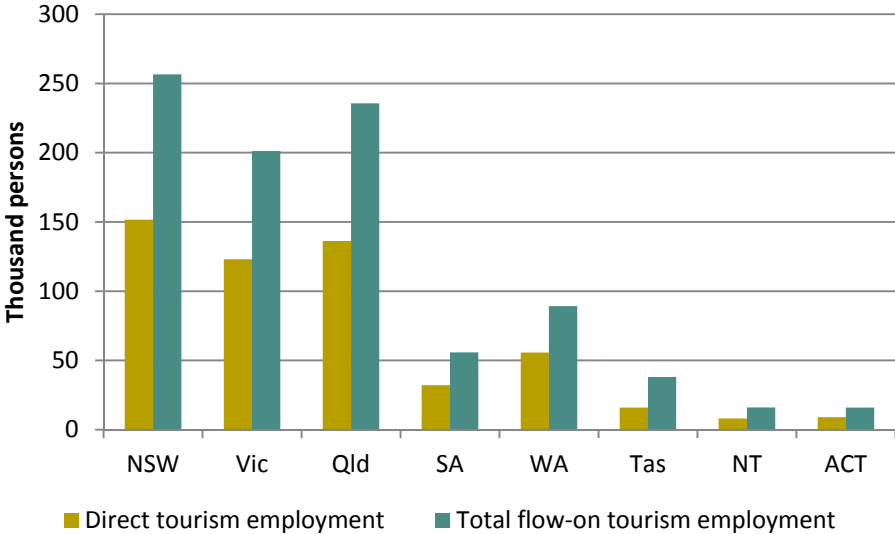
- In absolute terms, New South Wales, Victoria and Queensland are still the largest tourism states. Figures ES5 and ES6 show the levels of direct effect and total flow-on effects for GVA and employment across all states and territories.

Figure ES5: State and territory tourism GVA, 2011-12



Source: TRA's estimates

Figure ES6: State and territory tourism employment, 2011–12



Source: TRA's estimates

Introduction

The tourism industry is an important contributor to the Australian economy. However, the System of National Accounts (SNA) does not capture tourism as a single industry, because of tourism's diverse products and services. Tourism Satellite Accounts (TSAs) bridge this gap by measuring the economic contribution of tourism and effectively supplementing the SNA.

TSAs estimate the worth of the tourism sector by combining the contributions of various goods and services across the economy. By doing this, comparisons can be made between the tourism industry's economic contribution and that of conventional industries within an economy, or even between tourism sectors across different countries.

Additionally, state-based TSAs play an important role in highlighting the diversity of Australia's tourism offerings, and how tourism contributes to each state's economy.

The 2011–12 state TSAs are based on regional tourism expenditure data that were revised upwards in May 2013. Therefore, data in this release are higher than those published previously for the same year, and cannot be compared. This release also takes into account inputs at the national level that were estimated using new benchmark 2009–10 supply-use tables for the national TSA, and the latest 2008–09 national Input-Output (I-O) tables.

TRA continues to go beyond the scope of the national TSA by measuring the direct¹ and indirect² contribution of tourism, and the resulting total contribution of tourism to the state and national economies. The direct tourism contribution of the state TSAs can be lined up with the national TSA data published by the Australian Bureau of Statistics (ABS), while the indirect tourism contribution supplements the national TSAs by providing a more complete picture of the economic contribution that tourism makes to Australia's economy.

Conceptual frameworks

The TSA framework, as recommended by the United Nations World Tourism Organization (UNWTO), differentiates between goods and services that have direct physical contact with tourists (direct tourism output) and those that do not (indirect tourism output).

For example, direct tourism output is best represented by hotels or restaurants, where tourists stay or purchase their meals. Indirect tourism output can be demonstrated by tourists purchasing petrol. The petrol was not produced by the retail petrol station, thus only the cost of running the petrol station as a retail margin is included in the direct tourism output, while the cost of petrol itself is an indirect tourism output.

¹ Goods and services that have direct physical contact with tourists

² Goods and services that do not come into contact with tourists

The introduction of such direct and indirect definitions in TSA has overlapped with similar terminology (not the concept itself) that has been historically used in I-O modelling. The table below shows the differences between the concepts.

Table 1: Comparisons of TSA framework and I-O modelling concepts

	TSA framework	I-O modelling
Direct tourism output	Goods and services that have direct physical contact with tourists (e.g. hotels, restaurant meals)	Total initial consumption demand, regardless of whether tourists have direct or indirect physical contact with the producers of the goods and services.
Indirect tourism output	Goods and services that do not come into contact with tourists (e.g. petrol purchase, as the petrol is not produced by the retail petrol station)	Measures the flow-on effect of the initial tourism consumption through the multiple rounds of input requirements when a product is sold. Using the petrol purchase as an example, the flow-on effects relate to the downstream demand for oil (oil industry) by the refineries (petrol industry) to produce petrol, and the electricity consumed by the petrol station.

As the ABS apply the definition of *direct* contribution from the TSA framework in the national TSA, this report also adopts this definition to allow easy reconciliation between state and national direct tourism contribution.

However, using direct tourism alone will under-estimate the total contribution of tourism to the whole economy because the amount of expenditure that does not have direct contact between tourists and producing industries is left out in the calculation of tourism contribution, petrol or shopping for example. To estimate the total contribution of tourism to the economy correctly, the consumptions of TSA direct and TSA indirect tourism output are combined again. This estimate of initial consumption is then used to calculate the flow-on effects using the I-O multipliers.

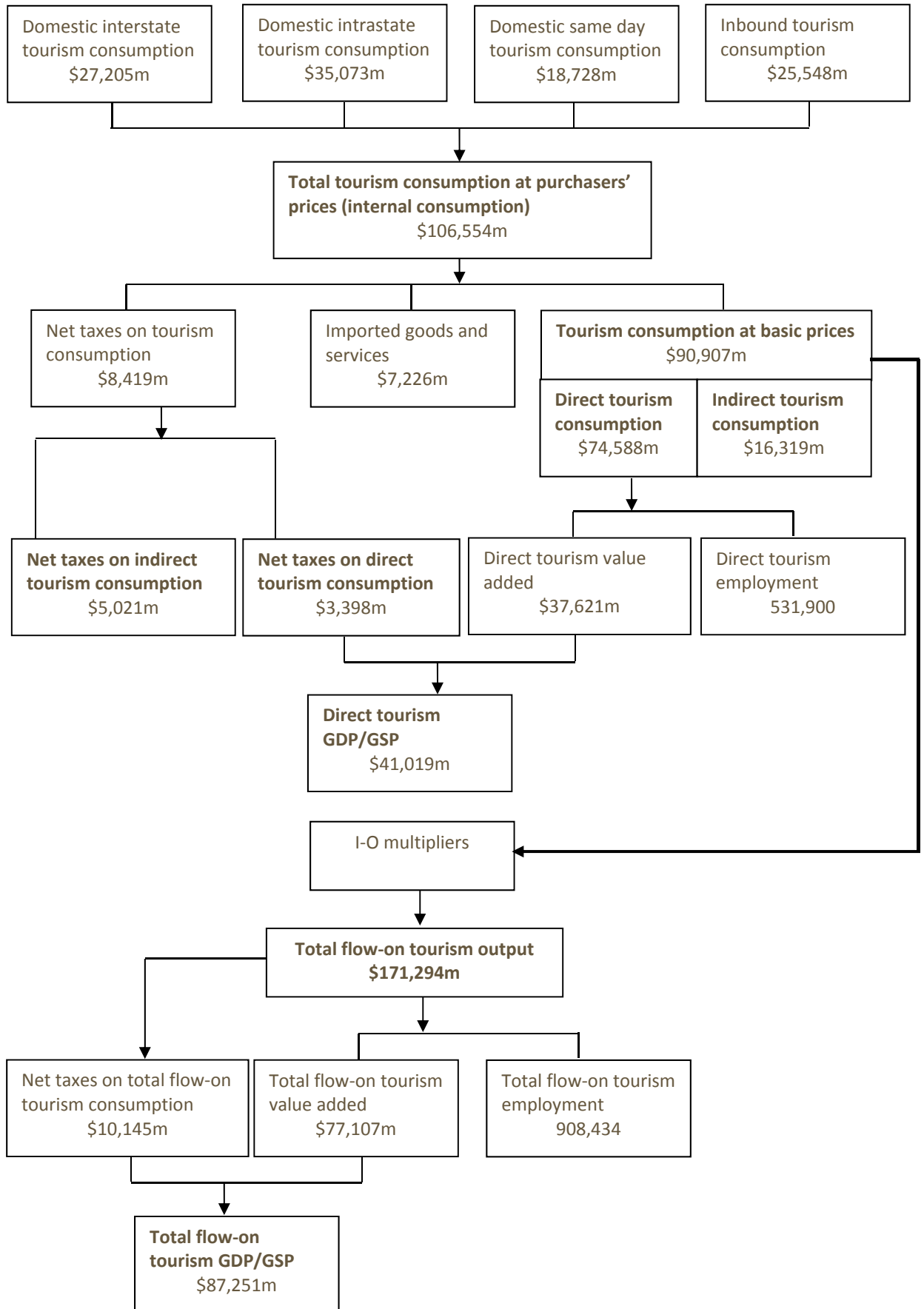
Using the example of the tourist purchasing petrol, the indirect component (fuel cost alone) is then combined with the down-stream effect of tourism contribution and presented as the indirect contribution of tourism. Strictly speaking, this is a mixed indirect contribution measure. The sum of the direct and (mixed) indirect is presented as the *total* flow-on contribution in this report, as shown in Figure 1.

Total tourism consumption is measured at the purchasers' prices, i.e. the price paid by tourists. However, not all of this payment is received by the producers, as part of this payment is contributed to the government as tax revenue. Part of it is also paid

to imported sources that supplement the domestic producers to supply those goods and services to the tourism sector.

The part paid to the domestic producers is defined as tourism consumption at basic prices—sometimes referred to as farm gate prices, or factory prices. This reflects the fact that tourism consumption at basic prices is smaller than total tourism expenditure. Consumption at basic prices is equivalent to domestic output, and it is from this domestic output that all other measures such as tourism Gross Value Added (GVA), tourism Gross State Product (GSP), employment, and indirect effects are derived.

Figure 1: Summary chart



Trends in state tourism aggregates

Overall, there is a downward trend in the direct tourism share in the national totals of GVA and GDP over the period 2006–07 and 2011–12 (Table 2). Between 2006–07 and 2011–12, there was a marginal fall in tourism’s direct share of total GVA (from 3.0 per cent to 2.7 per cent) and GDP (from 3.0 per cent to 2.8 per cent). In terms of tourism’s flow-on contribution, GVA share fell from 6.4 per cent to 5.6 per cent over this period, while for GDP the equivalent decrease was from 6.7 per cent to 5.9 per cent.

Table 2: Direct tourism’s share of national GVA and GDP

	2006– 07	2007– 08	2008– 09	2009– 10	2010– 11	2011– 12	Average
	per cent						
Direct tourism GVA share ^(a)	3.0	3.0	2.8	2.9	2.7	2.7	2.8
Direct tourism GDP share ^(a)	3.0	3.0	2.9	2.9	2.8	2.8	2.9
Direct tourism employment share ^(a)	4.80	4.79	4.71	4.72	4.70	4.66	4.7
Total flow-on tourism GVA share ^(b)	6.4	6.3	5.8	6.0	5.6	5.6	5.9
Total flow-on tourism GDP share ^(b)	6.7	6.5	6.1	6.3	5.8	5.9	6.2
Total flow-on tourism employment share ^(b)	8.02	8.03	7.85	7.88	7.83	7.96	7.9

Sources: ^(a) ABS (2013); ^(b) TRA's estimates

The fall in tourism's direct and total share of GVA and GDP between 2006–07 and 2011–12 can be attributed to the stronger growth recorded in non-tourism related industries, which combined registered growth of 6.9 per cent per annum in GVA over this period. This growth was derived mainly from mining (12.9 per cent), professional, scientific and technical services (10 per cent) and financial and insurance services (8.7 per cent).

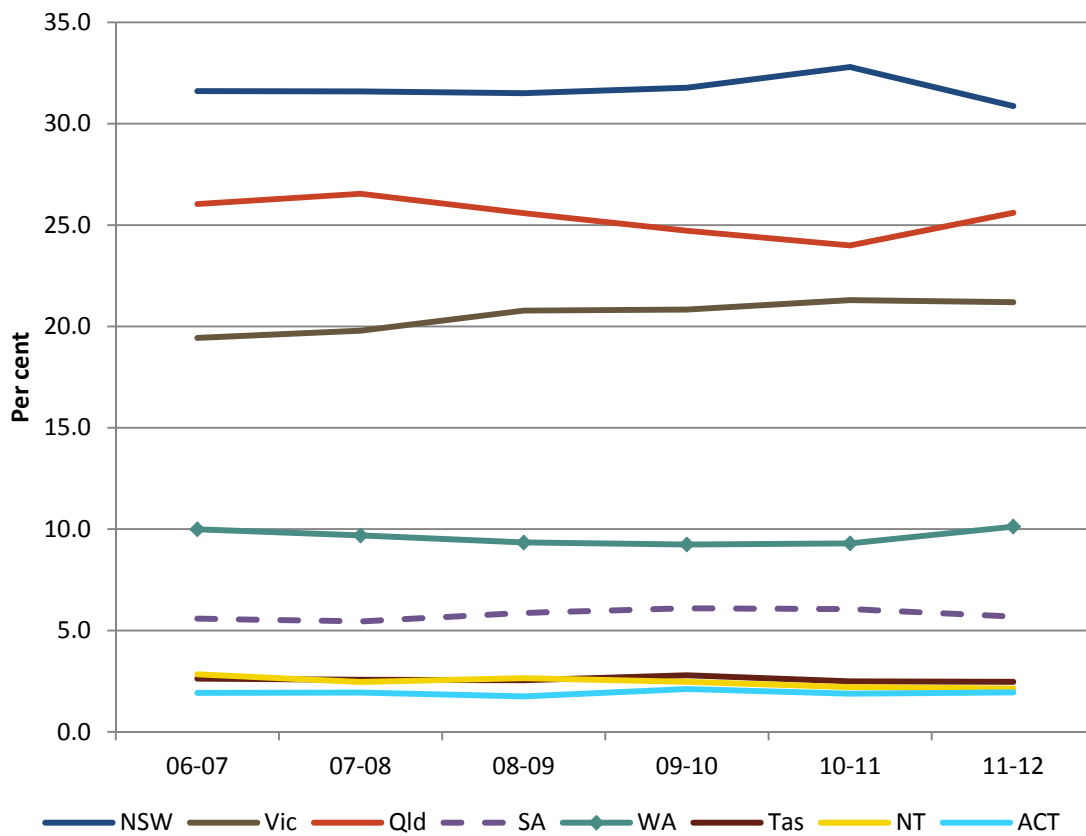
The only non-tourism related industries with lower annual average growth than tourism were manufacturing (2.4 per cent) and information, media and telecommunication services (4.5 per cent). In contrast, the average annual rate of growth was 5.1 per cent for direct tourism GVA and 4.2 per cent for total (including indirect) tourism GVA.

However, the direct contribution of tourism to employment over this period remained around 4.7 per cent, and overall (including its indirect contribution) tourism consistently accounted for around 7.9 per cent of total employment in Australia.

Annual average growth in direct (1.3 per cent) and total (1.8 per cent) tourism employment were similar to that for total employment (1.9 per cent) across all industry sectors. While some industries such as mining (12.9 per cent) and electricity, gas, water and waste services (7.7 per cent) recorded much stronger annual average growth in employment than tourism, many others including manufacturing (-1.4 per cent), wholesale trade (0.3 per cent) and retail trade (0.4 per cent) had weaker growth.

In a diverse economic environment such as Australia that has a range of economic structures across its states and territories, tourism sectors can move in different directions. Figure 2 shows the trends of the state/ territories tourism GVA as a share of Australia's total direct tourism GVA.

Figure 2: State/territory tourism GVA share of Australia's total direct tourism GVA



Source: TRA's estimates

Overall, there are three groups of tourism regions:

- Large tourism states - New South Wales, Queensland and Victoria; these three states combined contribute around 77.6 per cent of the total national tourism GVA.
- Medium tourism states - South Australia and Western Australia; these two states combined contribute around 15.4 per cent of the total national tourism GVA.
- Small tourism states - Tasmania, Northern Territory and the Australian Capital Territory; these three regions contribute around 7 per cent of total national tourism GVA.

For the period 2007–08 to 2010–11:

- Queensland, Western Australia and Northern Territory suffered declines in their regional shares of the national total during this period. These declines were mainly due to a reduction in interstate and inbound tourism demand resulting from the mining boom effect in these states. Queensland also suffered from major floods in 2010–11 that added to the adverse impacts on its tourism sectors.
- Over the same period, New South Wales, Victoria and South Australia increased their (direct) tourism contribution to the national total.
- The opposite changes in the two groups reflect the substitution effect among tourism destinations in response to price sensitivity, and also a shortage of accommodation and air transportation due to the mining boom effect.

In 2011–12:

- Tourism markets in both Queensland and Western Australia showed signs of growth, which was offset by the reductions in contribution of New South Wales, Victoria and South Australia.

Tourism consumption

Tourism consumption is the total value of goods and services consumed by domestic and overseas visitors in Australia.³ It is measured in purchasers' prices—the price the visitor pays, including taxes and subsidies. In 2011–12, tourism consumption totalled \$106.6 billion, 6.8 per cent higher in nominal terms than in 2010–11.

Domestic travel's contribution

- In 2011–12, domestic travel accounted for \$81.0 billion (76 per cent) of total tourism consumption.
- Of domestic travel, intrastate travel was the largest contributor (\$35.1 billion or 43 per cent), followed by interstate travel (\$27.0 billion or 34 per cent) and same-day travel (\$18.7 billion or 23 per cent).
- Between 2006–07 and 2011–12 there was little change in how much domestic travel contributed to total tourism consumption—intrastate travel consistently accounted for 31 to 33 per cent of consumption, interstate travel 26 to 28 per cent, and same-day travel 17 to 18 per cent.

International travel's contribution

- In 2011–12, international travel accounted for \$25.5 billion (24 per cent) of total tourism consumption.
- Between 2006–07 and 2011–12, international tourism consistently contributed 23 to 25 per cent to total tourism consumption.

Australia's state/territories' contribution

The contribution of New South Wales, Queensland and Victoria to total tourism consumption in 2011–12 (77%) was largely unchanged compared to the four preceding years. For the same period, the combined value from the remaining states/territories was \$25 billion (23%) (Table 3).

³This also includes imputed non-market transactions such as the estimated rental value of accommodation in self-owned holiday homes; the cost to households of food and alcohol in hosting visiting friends and relatives; and non-market services provided by governments, such as entry to museums and galleries.

Table 3: State/territory contribution to total tourism consumption, 2011–12

	Contribution to total tourism consumption (national), 2011–12 (billion)	Domestic travel's share of state/territory tourism consumption
NSW	\$31.5 (or 30%)	74%
Qld	\$26.8 (25%)	79%
Vic	\$23.4 (22%)	75%
WA	\$11.0 (10.3%)	73%
SA	\$6.5 (6.1%)	83%
Tas	\$3.0 (2.8%)	84%
NT	\$2.4 (2.3%)	73%
ACT	\$2.0 (1.9%)	78%
Australia	\$106.6	76%

Sources: TRA's estimates (for states/territories) and ABS (2013) (for Australia)

Between 2006–07 and 2011–12, the contribution of domestic tourism to total consumption declined in Western Australia (from 77 per cent to 73 per cent), South Australia (from 86 per cent to 83 per cent), Victoria (from 77 per cent to 75 per cent) and the Australian Capital Territory (from 84 per cent to 78 per cent). For all other states and territories the contribution of domestic tourism has either increased slightly or remained relatively consistent.

Contribution by tourism products

At the product level, the tourism characteristic⁴ products that contributed most to tourism consumption nationally in 2011–12 were:

- long distance passenger transportation (\$17.8 billion or 17 per cent)
- takeaway and restaurant meals (\$16.5 billion or 15 per cent)
- accommodation (\$12.2 billion or 11 per cent).

The tourism connected⁵ products that contributed most to tourism consumption were:

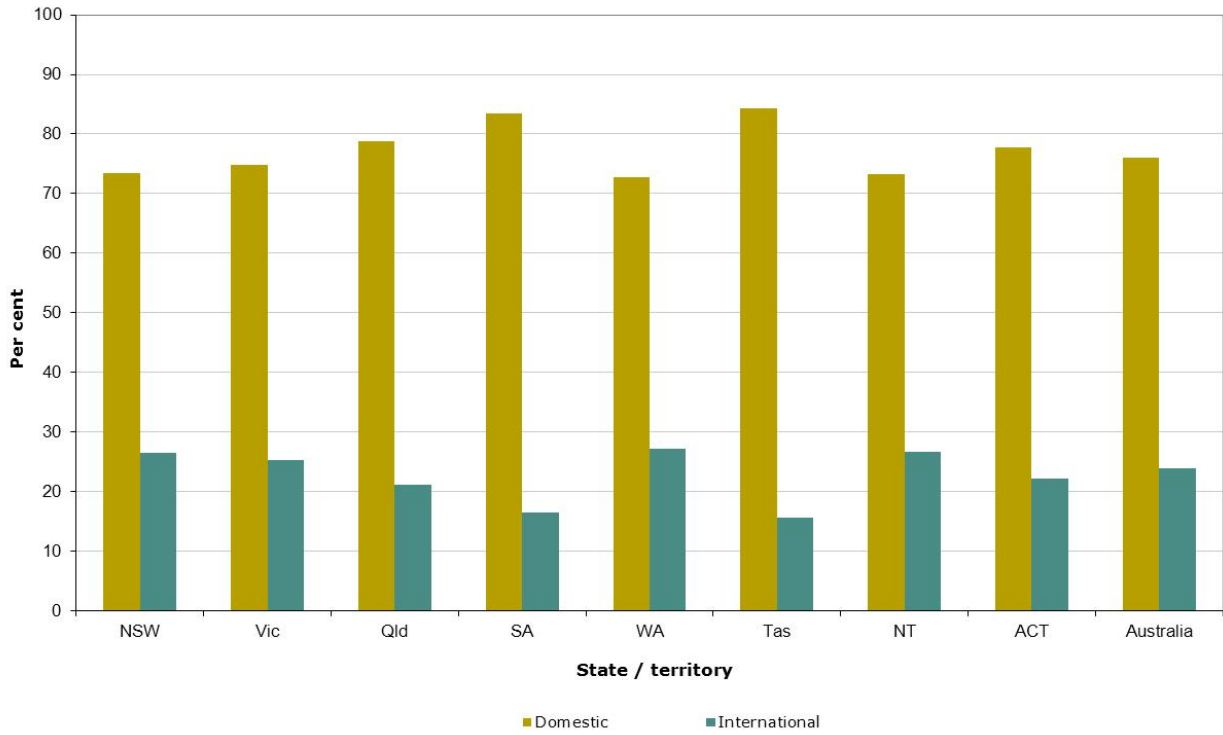
- shopping (\$13.5 billion or 13 per cent)
- fuel (\$10.1 billion or 9 per cent)
- food products (\$7.0 billion or 7 per cent).

⁴ As defined by the ABS, 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.

⁵ As defined by the ABS, tourism connected products are those that are consumed by visitors but are not considered as tourism characteristic products.

Among all tourism characteristic and connected products, the ones above had the highest state shares. However, the ranking varied from state to state for long distance passenger transportation, takeaway and restaurant meals, food products and fuel (Table 10).

Figure 3: Domestic and international travel’s share of tourism consumption, 2011-12



Sources: TRA’s estimates (for states/territories) and ABS (2013) (for Australia)

Tourism GVA

Tourism GVA is considered the most accurate measure of the contribution of tourism to the economy. It includes the total labour income and capital revenue the industry receives, plus net taxes on production.

Total direct tourism GVA was \$37.6 billion in 2011–12, which is 5.3 per cent higher in nominal terms than the previous year. This represented 2.7 per cent of Australia's total GVA, which is less than the 3.0 per cent share in 2006–07 and 2007–08.

In 2011–12, total direct tourism GVA was made up of:

- domestic travel—\$26.9 billion (72 per cent), of which \$12.5 billion (46 per cent) was for intrastate travel, \$10.1 billion (38 per cent) for interstate travel and \$4.3 billion (16 per cent) for same-day trips
- international tourism—\$10.7 billion (28 per cent).

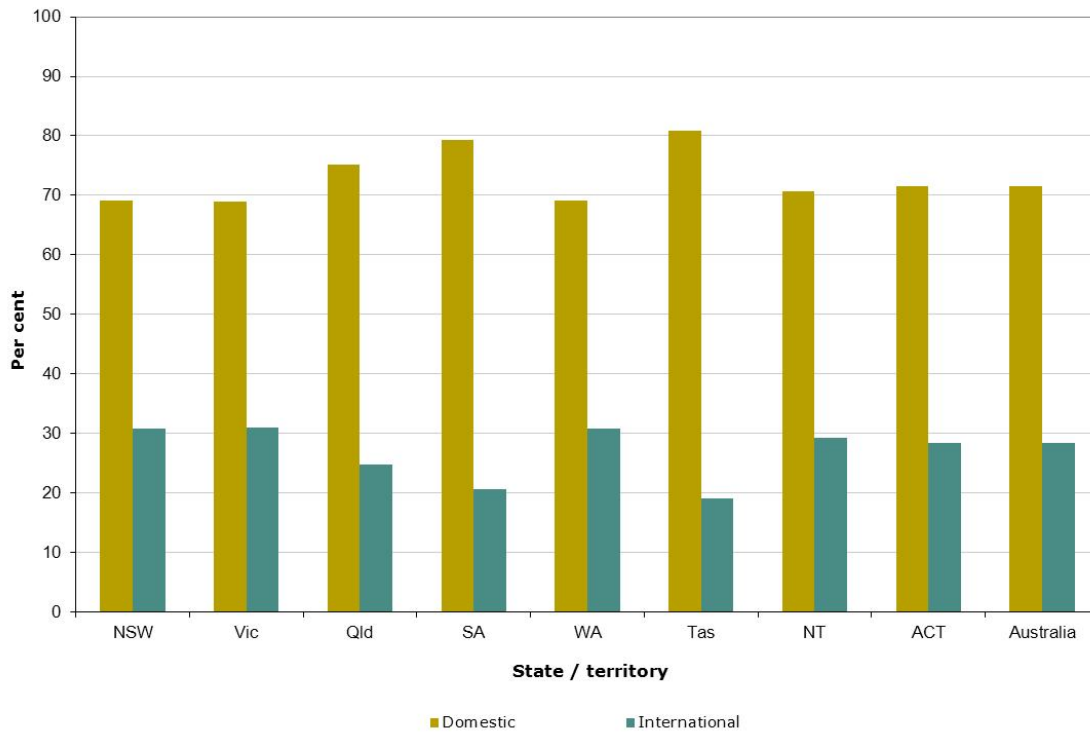
The states that contributed most to total direct tourism GVA in 2011–12 were:

- New South Wales (\$11.6 billion or 31 per cent)
- Queensland (\$9.6 billion or 26 per cent)
- Victoria (\$7.9 billion or 21 per cent).

In 2011–12, domestic travel contributed the following to the state/territories' total direct tourism GVA (Table 4):

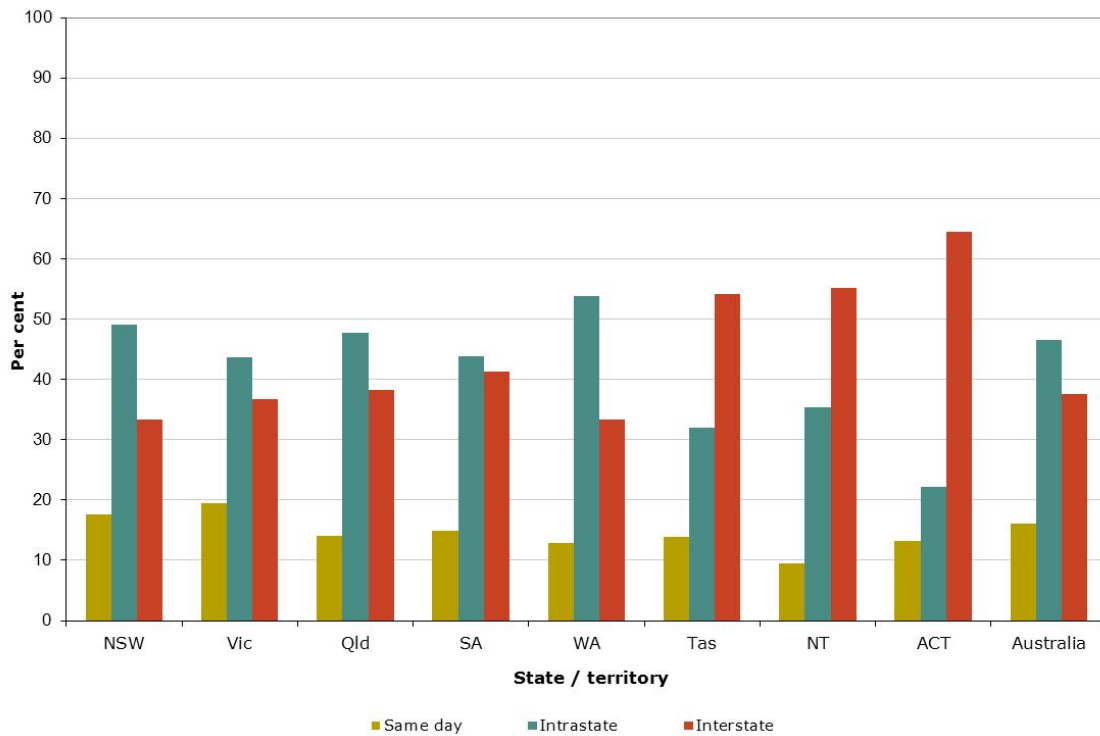
- Tasmania (\$750 million or 81 per cent)
- South Australia (\$1.7 billion or 79 per cent)
- Queensland (\$7.2 billion or 75 per cent)
- Australian Capital Territory (\$522 million or 72 per cent)
- Northern Territory(\$576 million or 71 per cent)
- Western Australia (\$2.6 billion or 69 per cent),
- Victoria (\$5.5 billion or 69 per cent)
- New South Wales (\$8.0 billion or 69 per cent).

Figure 4: Domestic and international travel's share of direct tourism GVA, 2011–12



Sources: TRA's estimates (for states/territories) and ABS (2013) (for Australia)

Figure 5: Contribution of segments to domestic direct tourism GVA, 2011–12



Sources: TRA's estimates (for states/territories) and ABS (2013) (for Australia)

In the domestic tourism segment, the share of total direct tourism GVA attributed to interstate travel was highest for Australian Capital Territory (65 per cent), Northern Territory (55 per cent) and Tasmania (54 per cent). The contribution of intrastate travel was highest in Western Australia (54 per cent), New South Wales (49 per cent) and Queensland (48 per cent).

Total direct tourism GVA contributed most to total state GVA in Northern Territory (4.5 per cent), Tasmania (4.1 per cent) and Queensland (3.6 per cent) in 2011–12. In contrast, its share of total state GVA was smallest in Western Australia (1.7 per cent) and ranged between 2 and 3 per cent for New South Wales (2.8 per cent), Australian Capital Territory (2.4 per cent), Victoria (2.6 per cent) and South Australia (2.5 per cent). Between 2006–07 and 2011–12, tourism's direct share of total state GVA fell in Western Australia, Northern Territory and Australian Capital Territory. In other states, the ratios remained unchanged or increased slightly (Table 2 and Figure 6).

By industry, the tourism characteristic industries that contributed most to total direct tourism GVA nationally in 2011–12 were:

- accommodation (\$6.5 billion or 17 per cent)
- air, water and other transport (\$6.1 billion or 16 per cent)
- cafes, restaurants and takeaway food services (\$4.1 billion or 11 per cent).

These tourism characteristic industries also accounted for the largest share of total direct tourism GVA in all states and territories except New South Wales, Victoria, Western Australia and South Australia, where ownership of dwellings was ranked ahead of cafes, restaurants and takeaway food services. Air, water and other transport ranked above accommodation in Victoria, South Australia, Western Australia and Northern Territory as the top contributing industry to total direct tourism GVA (Table 8).

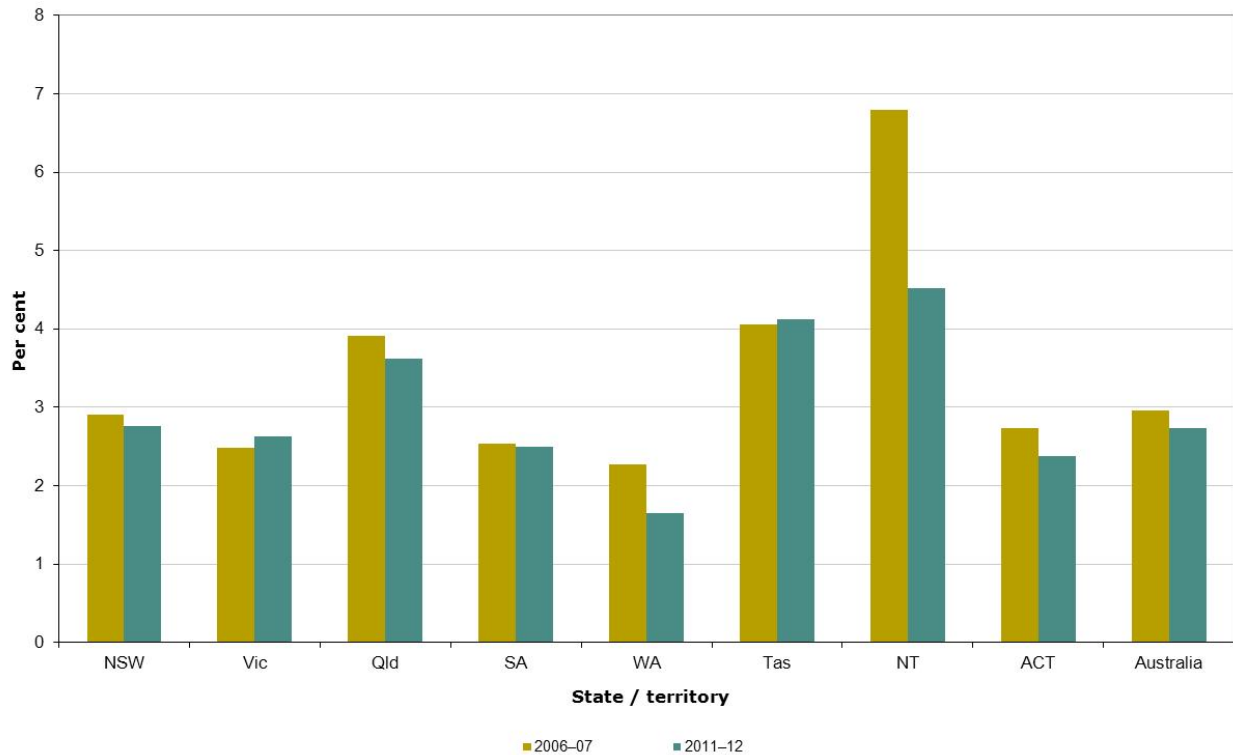
Indirect tourism GVA contributed a further \$39.5 billion nationally in 2011–12. Combined with direct tourism GVA, this represented total GVA from tourism of \$77.1 billion or 5.6 per cent of Australia's total GVA. Between 2006–07 and 2011–12 the contribution of indirect tourism GVA to total tourism GVA reduced marginally from 54 to 51 per cent.

The states that contributed most to indirect tourism GVA in 2011–12 were:

- New South Wales (\$12.1 billion or 31 per cent)
- Queensland (\$10 billion or 25 per cent)
- Victoria (\$8.7 billion or 22 per cent).

Meanwhile, the contribution of indirect tourism GVA to total tourism GVA was most important for Tasmania (53 per cent), Victoria (52 per cent) and South Australia (52 per cent); least so for Australian Capital Territory (48 per cent), Western Australia (50 per cent) and Northern Territory (50 per cent); and the same for New South Wales and Queensland (51 per cent each) (Tables 11 and 12).

Figure 6: Contribution of direct tourism GVA to each state economy, 2006–07 and 2011–12



Sources: TRA's estimates (for states/territories) and ABS (2013) (for Australia)

Tourism employment

The TSAs define tourism employment as the number of persons employed in tourism-related industries. Total tourism employment is derived by multiplying the number of employed persons in each industry by the proportion of total tourism-related output of that industry.

There were 531,900 persons directly employed by the tourism industry nationally in 2011–12 (ABS, 2013). This represented a 0.3 per cent increase from the previous year and an average annual increase of 1.3 per cent since 2006–07, when there were 499,000 employed directly by the tourism industry (Table 2).

The states that contributed most to the total number of persons employed directly in tourism in 2011–12 were:

- New South Wales (152,000 or 29 per cent)
- Queensland (136,000 or 26 per cent)
- Victoria (123,000 or 23 per cent).

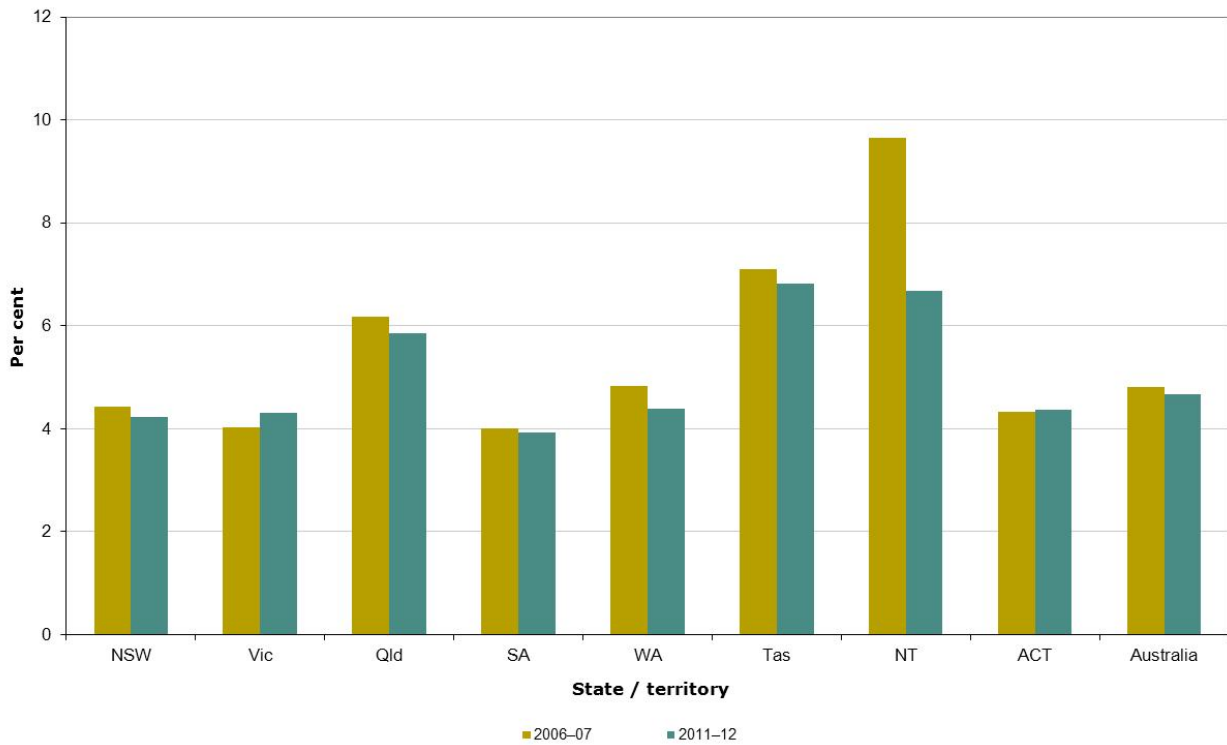
All other states together only accounted for the remaining 23 per cent. However, within each state, direct tourism employment accounted for the following shares of total state employment:

- Tasmania: 6.8 per cent
- Northern Territory: 6.7 per cent
- Queensland: 5.9 per cent
- Western Australia: 4.4 per cent
- Australian Capital Territory: 4.4 per cent
- Victoria: 4.3 per cent
- New South Wales: 4.2 per cent
- South Australia: 3.9 per cent
- Australia as a whole: 4.7 per cent

Between 2006–07 and 2011–12, tourism's direct share of total employment increased marginally in Victoria and the Australian Capital Territory (0.3 and 0.1 percentage points, respectively) but declined in other states and territories (Figure 7).

Reflecting this, direct tourism employment in Victoria has increased its relative share (20.8 to 23.1 per cent) of total direct tourism employment over this period. In contrast, New South Wales (29.3 to 28.5), Queensland (26.2 to 25.6 per cent) and the Northern Territory (2.0 to 1.5 per cent) have all reduced their shares. Australian Capital Territory's share has remained unchanged at 1.7 per cent (Table 4).

Figure 7: Contribution of direct tourism employment to each state economy, 2006–07 and 2011–12



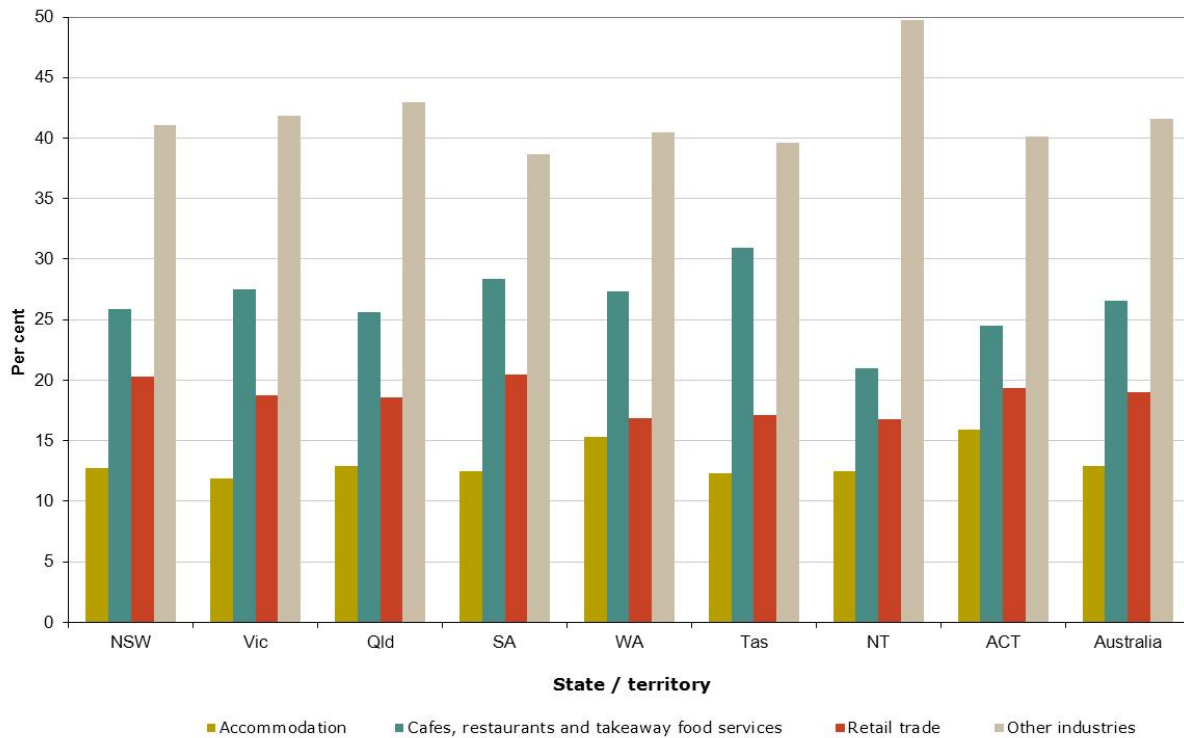
Sources: TRA's estimates (for states/territories) and ABS (2013) (for Australia)

By industry, the tourism characteristic industries that contributed most to tourism employment nationally in 2010–11 were:

- cafes, restaurants and takeaway food services (141,100 employed persons or 27 per cent)
- retail trade (101,000 employed persons or 19 per cent)
- accommodation (68,600 employed persons or 13 per cent).

These tourism characteristic industries also accounted for the largest share of total direct tourism employment in all states and territories except Queensland and the Northern Territory, where air, water and other transport ranked ahead of accommodation (Figure 8 and Table 9).

Figure 8: Contribution of industries to direct tourism employment, 2011–12



Sources: TRA's estimates (for states/territories) and ABS (2013) (for Australia)

Overall, a further 376,534 people were employed indirectly by the tourism industry in 2011–12. Combined with the direct tourism employment, this represented a total employment from tourism of 908,434 (or 8.0 per cent) of total employment in Australia. Between 2006–07 and 2011–12, the contribution of indirect tourism employment to total tourism employment remained steady at 40 per cent for Australia as a whole.

At the state level, New South Wales (105,000 persons or 28 per cent), Queensland (99,000 persons or 26 per cent) and Victoria (78,000 persons or 21 per cent) contributed most to indirect tourism employment in 2011–12. The contribution of indirect tourism employment to total tourism employment was around 39 and 42 per cent for all states and territories except Tasmania (58 per cent), the Northern Territory (49 per cent) and the Australian Capital Territory (44 per cent), where its influence was greater (Tables 10 and 11).

Conclusion

State Tourism Satellite Accounts, 2011–12 presents a complete picture of tourism at the state and territory level, reporting results for key economic indicators for Australia's tourism industry.

Tourism consumption⁶

- Tourism consumption totalled **\$106.6 billion** in 2011–12, **6.8 per cent (or \$6.8 billion) higher** in nominal terms than in 2010–11.
 - More than 90 per cent of this growth occurred in Queensland, Western Australia and Victoria.

Tourism Gross Value Added (GVA) and Tourism Gross Domestic Product (GDP)

- Tourism contributed *directly* **\$37.6 billion** of GVA and **\$41 billion** of GDP to the Australian economy.
- Tourism contributed *indirectly* **\$39.5 billion** of GVA and **\$46.2 billion** of GDP.
 - All states and territories experienced growth in *indirect* GVA and GDP compared with 2010–11. The strongest growth occurred in Queensland, Western Australia and Victoria with moderate growth in other states and territories.

Tourism employment

- The tourism industry *directly* employed approximately **532,000 persons** and *indirectly* generated additional employment for approximately **377,000 persons**.
 - All states and territories experienced growth in *indirect* employment compared with 2010–11. The strongest growth occurred in Queensland, Western Australia and Victoria with moderate growth in other states and territories.

The changes to tourism in 2011–12, particularly in Queensland and Western Australia, highlight a new and positive phase for tourism in Australia. These changes indicate that—together with other non-mining states—the mining states seem to have regained their momentum to contribute to the growing tourism sector.

Sustained growth in these states should provide opportunities that influence investment and diversification for longer term tourism opportunities.

⁶ See the Glossary on page 52 for definitions of Tourism consumption, GVA, GDP and employment

Appendix A – Key tables

Table 1: Key direct tourism aggregate results, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total(a)
	LEVEL								
Gross value added	\$ million								
2006–07	9353	5750	7706	1651	2956	774	837	567	29594
2007–08	10121	6338	8503	1744	3103	821	787	618	32035
2008–09	10303	6796	8368	1919	3053	832	864	569	32703
2009–10	11063	7252	8606	2121	3217	971	856	734	34821
2010–11	11714	7605	8569	2163	3320	889	786	669	35713
2011–12	11615	7971	9631	2138	3808	927	802	729	37621
Net taxes on products	\$ million								
2006–07	871	525	786	155	286	81	100	57	2860
2007–08	932	577	863	161	293	86	92	61	3065
2008–09	928	601	829	171	285	84	99	55	3053
2009–10	969	619	811	186	288	97	95	69	3134
2010–11	1041	647	815	190	297	87	87	61	3224
2011–12	1019	681	921	185	345	91	88	68	3398
Total gross state product	\$ million								
2006–07	10224	6275	8491	1806	3242	855	937	625	32454
2007–08	11052	6914	9366	1905	3396	907	879	680	35100
2008–09	11230	7396	9197	2090	3339	916	963	624	35756
2009–10	12031	7871	9417	2307	3505	1068	951	804	37955
2010–11	12754	8251	9384	2353	3616	975	873	730	38937
2011–12	12634	8652	10552	2323	4153	1018	889	797	41019
Employed persons	'000								
2006–07	146	104	131	31	53	16	10	8	499
2007–08	150	110	137	30	52	16	9	9	513
2008–09	150	115	132	33	50	16	10	8	514
2009–10	153	118	129	34	49	17	9	10	519
2010–11	162	123	127	34	51	16	8	9	531
2011–12	152	123	136	32	56	16	8	9	532
	SHARE OF STATE ECONOMY								
Gross value added	%								
2006–07	2.9	2.5	3.9	2.5	2.3	4.1	6.8	2.7	3.0
2007–08	2.9	2.5	4.0	2.4	2.1	4.1	5.5	2.7	3.0
2008–09	2.8	2.6	3.4	2.6	1.8	4.1	5.5	2.3	2.8
2009–10	2.9	2.7	3.6	2.7	1.9	4.5	5.5	2.7	2.9
2010–11	2.9	2.6	3.4	2.6	1.6	3.9	4.8	2.3	2.7

2011–12	2.8	2.6	3.6	2.5	1.7	4.1	4.5	2.4	2.7
Net taxes on products	%								
2006–07	3.0	2.4	5.0	2.6	3.4	4.9	13.7	3.9	3.4
2007–08	3.1	2.4	5.2	2.5	3.4	5.0	12.0	4.0	3.4
2008–09	3.3	2.7	5.5	2.9	3.9	5.1	11.9	3.9	3.7
2009–10	3.1	2.6	4.9	3.0	3.5	5.8	11.2	4.5	3.5
2010–11	3.2	2.5	4.9	2.9	3.7	5.2	10.5	3.7	3.4
2011–12	3.0	2.6	5.2	2.8	4.0	5.4	10.2	4.3	3.5
Total gross state product	%								
2006–07	2.9	2.5	4.0	2.5	2.3	4.1	7.2	2.8	3.0
2007–08	2.9	2.5	4.1	2.4	2.2	4.1	5.8	2.8	3.0
2008–09	2.9	2.6	3.6	2.6	1.9	4.1	5.8	2.4	2.9
2009–10	2.9	2.6	3.7	2.8	1.9	4.5	5.8	2.8	2.9
2010–11	2.9	2.6	3.5	2.6	1.6	4.0	5.0	2.4	2.8
2011–12	2.8	2.6	3.7	2.5	1.7	4.2	4.8	2.5	2.8
Employed persons	%								
2006–07	4.4	4.0	6.2	4.0	4.8	7.1	9.6	4.3	4.8
2007–08	4.4	4.1	6.3	3.9	4.6	6.9	8.1	4.4	4.8
2008–09	4.4	4.3	5.9	4.1	4.2	6.6	8.4	4.0	4.7
2009–10	4.4	4.3	5.7	4.3	4.2	7.5	7.8	4.8	4.7
2010–11	4.6	4.3	5.5	4.2	4.2	6.7	6.7	4.2	4.7
2011–12	4.2	4.3	5.9	3.9	4.4	6.8	6.7	4.4	4.7

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

Table 2: Direct tourism output by tourism category, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total ^(a)
	LEVEL (\$million)—basic prices								
<i>Same-day travel</i>									
2006–07	2379	1592	1553	417	578	198	82	147	6947
2007–08	2439	1677	1583	407	609	179	74	169	7137
2008–09	2477	1943	1623	454	599	189	101	121	7507
2009–10	2844	1980	1855	438	625	207	96	169	8213
2010–11	2743	1862	1818	468	584	212	76	145	7910
2011–12	2824	2132	2049	488	674	212	107	153	8638
<i>Intrastate^(b)</i>									
2006–07	6423	3596	5302	1224	2406	419	363	202	19936
2007–08	6725	4023	5786	1286	2558	470	478	212	21537
2008–09	6724	3857	5680	1347	2476	456	472	179	21192
2009–10	7350	4177	5247	1341	2336	493	442	178	21564
2010–11	7810	4196	5626	1486	2507	507	446	188	22767
2011–12	7751	4736	7021	1466	2889	512	478	252	25105
<i>Interstate^(b)</i>									
2006–07	4394	3268	5277	1141	1546	792	935	649	18001
2007–08	4954	3609	5957	1164	1375	843	748	697	19347
2008–09	4631	3749	5194	1261	1243	787	806	653	18323
2009–10	4856	3837	5707	1511	1435	1018	836	841	20040
2010–11	5407	4250	5415	1388	1388	806	692	678	20026
2011–12	5301	4070	5789	1413	1733	880	731	722	20640
<i>International</i>									
2006–07	5875	3175	4438	608	1592	318	622	248	16877
2007–08	6102	3392	4483	737	1831	331	566	280	17723
2008–09	6392	3679	4764	715	1779	355	637	275	18596
2009–10	6305	3973	4720	829	1940	356	613	330	19065
2010–11	6702	4325	4582	899	2014	353	614	383	19871
2011–12	6685	4477	4712	826	2212	369	528	395	20203
<i>Total</i>									
2006–07	19072	11631	16571	3390	6123	1727	2001	1246	61760
2007–08	20220	12701	17809	3594	6373	1823	1866	1358	65744
2008–09	20224	13228	17261	3776	6098	1787	2016	1228	65619
2009–10	21355	13968	17528	4119	6336	2074	1986	1518	68883
2010–11	22662	14633	17441	4242	6494	1879	1829	1394	70573
2011–12	22561	15414	19571	4193	7509	1973	1844	1522	74587

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

^(b) Refers to domestic overnight intrastate and interstate travel.

Table 2 (continued): Direct tourism output by tourism category, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total ^(a)
STATE SHARE OF TOURISM OUTPUT (%)									
<i>Same-day travel</i>									
2006–07	34.2	22.9	22.4	6.0	8.3	2.9	1.2	2.1	100
2007–08	34.2	23.5	22.2	5.7	8.5	2.5	1.0	2.4	100
2008–09	33.0	25.9	21.6	6.0	8.0	2.5	1.3	1.6	100
2009–10	34.6	24.1	22.6	5.3	7.6	2.5	1.2	2.1	100
2010–11	34.7	23.5	23.0	5.9	7.4	2.7	1.0	1.8	100
2011–12	32.7	24.7	23.7	5.6	7.8	2.5	1.2	1.8	100
<i>Intrastate^(b)</i>									
2006–07	32.2	18.0	26.6	6.1	12.1	2.1	1.8	1.0	100
2007–08	31.2	18.7	26.9	6.0	11.9	2.2	2.2	1.0	100
2008–09	31.7	18.2	26.8	6.4	11.7	2.2	2.2	0.8	100
2009–10	34.1	19.4	24.3	6.2	10.8	2.3	2.0	0.8	100
2010–11	34.3	18.4	24.7	6.5	11.0	2.2	2.0	0.8	100
2011–12	34.3	18.4	24.7	6.5	11.0	2.2	2.0	0.8	100
<i>Interstate^(b)</i>									
2006–07	24.4	18.2	29.3	6.3	8.6	4.4	5.2	3.6	100
2007–08	25.6	18.7	30.8	6.0	7.1	4.4	3.9	3.6	100
2008–09	25.3	20.5	28.3	6.9	6.8	4.3	4.4	3.6	100
2009–10	24.2	19.1	28.5	7.5	7.2	5.1	4.2	4.2	100
2010–11	27.0	21.2	27.0	6.9	6.9	4.0	3.5	3.4	100
2011–12	27.0	21.2	27.0	6.9	6.9	4.0	3.5	3.4	100
<i>International</i>									
2006–07	34.8	18.8	26.3	3.6	9.4	1.9	3.7	1.5	100
2007–08	34.4	19.1	25.3	4.2	10.3	1.9	3.2	1.6	100
2008–09	34.4	19.8	25.6	3.8	9.6	1.9	3.4	1.5	100
2009–10	33.1	20.8	24.8	4.3	10.2	1.9	3.2	1.7	100
2010–11	33.7	21.8	23.1	4.5	10.1	1.8	3.1	1.9	100
2011–12	33.7	21.8	23.1	4.5	10.1	1.8	3.1	1.9	100
<i>Total</i>									
2006–07	30.9	18.8	26.8	5.5	9.9	2.8	3.2	2.0	100
2007–08	30.8	19.3	27.1	5.5	9.7	2.8	2.8	2.1	100
2008–09	30.8	20.2	26.3	5.8	9.3	2.7	3.1	1.9	100
2009–10	31.0	20.3	25.4	6.0	9.2	3.0	2.9	2.2	100
2010–11	32.1	20.7	24.7	6.0	9.2	2.7	2.6	2.0	100
2011–12	30.2	20.7	26.2	5.6	10.1	2.6	2.5	2.0	100

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

^(b) Refers to domestic overnight intrastate and interstate travel.

Table 3: Direct tourism GVA by tourism category, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total ^(a)
	LEVEL (\$million)								
<i>Same-day travel</i>									
2006–07	1156	766	741	201	287	95	33	71	3351
2007–08	1196	827	773	198	302	86	33	81	3496
2008–09	1244	1005	798	229	302	90	43	57	3768
2009–10	1450	1001	914	222	318	102	42	76	4125
2010–11	1380	925	891	235	301	106	34	69	3942
2011–12	1411	1076	1017	251	337	104	53	69	4318
<i>Intrastate^(b)</i>									
2006–07	3082	1718	2452	594	1126	181	147	86	9386
2007–08	3280	1977	2757	617	1209	208	203	87	10338
2008–09	3364	1927	2735	670	1213	208	200	77	10394
2009–10	3733	2126	2539	663	1148	224	183	77	10694
2010–11	3972	2127	2760	751	1235	232	182	83	11342
2011–12	3942	2405	3452	743	1418	241	201	116	12516
<i>Interstate^(b)</i>									
2006–07	2105	1593	2370	555	735	351	398	288	8395
2007–08	2441	1743	2768	561	653	374	310	310	9160
2008–09	2296	1858	2449	641	607	365	343	295	8852
2009–10	2482	1937	2753	790	719	471	361	408	9920
2010–11	2765	2157	2594	697	710	378	300	317	9919
2011–12	2681	2023	2767	701	879	406	313	337	10106
<i>International</i>									
2006–07	3011	1674	2143	300	807	146	259	122	8461
2007–08	3204	1791	2205	368	939	154	241	140	9041
2008–09	3398	2005	2386	380	932	169	279	140	9689
2009–10	3397	2188	2401	445	1032	174	271	173	10082
2010–11	3596	2396	2324	480	1073	172	269	200	10510
2011–12	3581	2468	2396	443	1174	177	234	207	10681
<i>Total</i>									
2006–07	9353	5750	7706	1651	2956	774	837	567	29594
2007–08	10121	6338	8503	1744	3103	821	787	618	32035
2008–09	10303	6796	8368	1919	3053	832	864	569	32703
2009–10	11063	7252	8606	2121	3217	971	856	734	34821
2010–11	11714	7605	8569	2163	3320	889	786	669	35713
2011–12	11615	7971	9631	2138	3808	927	802	729	37621

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.^(b) Refers to domestic overnight intrastate and interstate travel.

Table 3 (continued): Direct tourism GVA by tourism category, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total ^(a)
STATE SHARE OF TOURISM GROSS VALUE ADDED (%)									
<i>Same-day travel</i>									
2006–07	34.5	22.8	22.1	6.0	8.6	2.8	1.0	2.1	100
2007–08	34.2	23.6	22.1	5.7	8.6	2.4	0.9	2.3	100
2008–09	33.0	26.7	21.2	6.1	8.0	2.4	1.1	1.5	100
2009–10	35.2	24.3	22.2	5.4	7.7	2.5	1.0	1.8	100
2010–11	35.0	23.5	22.6	6.0	7.6	2.7	0.9	1.8	100
2011–12	32.7	24.9	23.5	5.8	7.8	2.4	1.2	1.6	100
<i>Intrastate^(b)</i>									
2006–07	32.8	18.3	26.1	6.3	12.0	1.9	1.6	0.9	100
2007–08	31.7	19.1	26.7	6.0	11.7	2.0	2.0	0.8	100
2008–09	32.4	18.5	26.3	6.4	11.7	2.0	1.9	0.7	100
2009–10	34.9	19.9	23.7	6.2	10.7	2.1	1.7	0.7	100
2010–11	35.0	18.8	24.3	6.6	10.9	2.0	1.6	0.7	100
2011–12	31.5	19.2	27.6	5.9	11.3	1.9	1.6	0.9	100
<i>Interstate^(b)</i>									
2006–07	25.1	19.0	28.2	6.6	8.8	4.2	4.7	3.4	100
2007–08	26.6	19.0	30.2	6.1	7.1	4.1	3.4	3.4	100
2008–09	25.9	21.0	27.7	7.2	6.9	4.1	3.9	3.3	100
2009–10	25.0	19.5	27.7	8.0	7.3	4.7	3.6	4.1	100
2010–11	27.9	21.7	26.2	7.0	7.2	3.8	3.0	3.2	100
2011–12	26.5	20.0	27.4	6.9	8.7	4.0	3.1	3.3	100
<i>International</i>									
2006–07	35.6	19.8	25.3	3.5	9.5	1.7	3.1	1.4	100
2007–08	35.4	19.8	24.4	4.1	10.4	1.7	2.7	1.5	100
2008–09	35.1	20.7	24.6	3.9	9.6	1.7	2.9	1.4	100
2009–10	33.7	21.7	23.8	4.4	10.2	1.7	2.7	1.7	100
2010–11	34.2	22.8	22.1	4.6	10.2	1.6	2.6	1.9	100
2011–12	33.5	23.1	22.4	4.2	11.0	1.7	2.2	1.9	100.0
<i>Total</i>									
2006–07	31.6	19.4	26.0	5.6	10.0	2.6	2.8	1.9	100
2007–08	31.6	19.8	26.5	5.4	9.7	2.6	2.5	1.9	100
2008–09	31.5	20.8	25.6	5.9	9.3	2.5	2.6	1.7	100
2009–10	31.8	20.8	24.7	6.1	9.2	2.8	2.5	2.1	100
2010–11	32.8	21.3	24.0	6.1	9.3	2.5	2.2	1.9	100
2011–12	30.9	21.2	25.6	5.7	10.1	2.5	2.1	1.9	100.0

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

^(b) Refers to domestic overnight intrastate and interstate travel.

Table 4: Direct tourism employment, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total ^(a)
	LEVEL ('000)								
2006–07	146	104	131	31	53	16	10	8	499
2007–08	150	110	137	30	52	16	9	9	513
2008–09	150	115	132	33	50	16	10	8	514
2009–10	153	118	129	34	49	17	9	10	519
2010–11	162	123	127	34	51	16	8	9	531
2011–12	152	123	136	32	56	16	8	9	532
	STATE SHARE OF TOURISM EMPLOYMENT (%)								
2006–07	29.3	20.8	26.2	6.1	10.6	3.2	2.0	1.7	100
2007–08	29.3	21.4	26.7	5.9	10.1	3.1	1.7	1.7	100
2008–09	29.2	22.4	25.7	6.4	9.8	3.1	1.9	1.5	100
2009–10	29.4	22.7	24.8	6.6	9.5	3.3	1.8	1.8	100
2010–11	30.5	23.2	24.0	6.5	9.7	3.0	1.5	1.6	100
2011–12	28.5	23.1	25.6	6.0	10.5	3.0	1.5	1.7	100
	TOURISM SHARE OF STATE EMPLOYMENT (%)								
2006–07	4.4	4.0	6.2	4.0	4.8	7.1	9.6	4.3	4.8
2007–08	4.4	4.1	6.3	3.9	4.6	6.9	8.1	4.4	4.8
2008–09	4.4	4.3	5.9	4.1	4.2	6.6	8.4	4.0	4.7
2009–10	4.4	4.3	5.7	4.3	4.2	7.5	7.8	4.8	4.7
2010–11	4.6	4.3	5.5	4.2	4.2	6.7	6.7	4.2	4.7
2011–12	4.2	4.3	5.9	3.9	4.4	6.8	6.7	4.4	4.7

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

Table 5: Tourism consumption by tourism category, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total ^(a)
	LEVEL (\$ million)—purchaser's prices								
<i>Same-day travel</i>									
2006–07	5001	3698	3372	1055	1460	493	142	288	15509
2007–08	5346	3915	3484	1026	1586	427	131	326	16241
2008–09	5224	4379	3534	1117	1388	465	170	238	16515
2009–10	5726	4278	3925	1057	1394	482	172	321	17355
2010–11	5558	4090	3782	1089	1409	475	125	261	16789
2011–12	5913	4732	4334	1168	1601	499	178	302	18728
<i>Intrastate^(b)</i>									
2006–07	9114	5495	7219	1892	3733	592	427	218	28690
2007–08	9334	6112	7871	1991	3858	665	577	233	30641
2008–09	9369	5902	7855	2055	3718	637	573	183	30292
2009–10	10042	6223	7080	2033	3364	685	504	168	30099
2010–11	10602	6150	7379	2203	3616	696	496	185	31327
2011–12	10627	6968	9522	2205	4183	715	573	279	35073
<i>Interstate^(b)</i>									
2006–07	5726	4714	7043	1726	2057	1216	1421	949	24853
2007–08	6358	5274	7800	1798	1836	1289	1073	1036	26463
2008–09	5997	5491	6735	1922	1656	1173	1150	960	25084
2009–10	6000	5385	7242	2184	1811	1565	1224	1216	26627
2010–11	6851	6157	6857	1976	1726	1179	941	977	26663
2011–12	6596	5806	7268	2014	2184	1315	1009	1013	27205
<i>International</i>									
2006–07	7336	4113	5478	777	2144	411	789	268	21317
2007–08	7569	4414	5544	955	2482	428	712	302	22406
2008–09	7985	4761	5860	919	2394	459	813	287	23478
2009–10	7857	5176	5769	1075	2608	463	764	361	24072
2010–11	8348	5647	5508	1167	2705	446	760	435	25017
2011–12	8337	5909	5684	1065	2986	470	642	456	25548
<i>Total</i>									
2006–07	27177	18020	23113	5449	9394	2712	2780	1723	90369
2007–08	28607	19715	24700	5770	9762	2808	2493	1897	95751
2008–09	28575	20533	23984	6014	9156	2735	2706	1667	95369
2009–10	29624	21062	24014	6350	9177	3195	2665	2066	98153
2010–11	31358	22045	23526	6436	9456	2796	2321	1859	99796
2011–12	31472	23415	26809	6453	10955	2999	2402	2049	106554

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

^(b) Refers to domestic overnight intrastate and interstate travel.

Table 5 (continued): Tourism consumption by tourism category, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total ^(a)
STATE SHARE OF TOURISM CONSUMPTION (%)									
<i>Same-day travel</i>									
2006–07	32.2	23.8	21.7	6.8	9.4	3.2	0.9	1.9	100
2007–08	33.4	23.8	21.5	6.2	9.7	2.7	0.8	1.8	100
2008–09	31.6	26.5	21.4	6.8	8.4	2.8	1.0	1.4	100
2009–10	33.0	24.6	22.6	6.1	8.0	2.8	1.0	1.9	100
2010–11	33.1	24.4	22.5	6.5	8.4	2.8	0.7	1.6	100
2011–12	31.6	25.3	23.1	6.2	8.6	2.7	1.0	1.6	100
<i>Intrastate^(b)</i>									
2006–07	31.8	19.2	25.2	6.6	13.0	2.1	1.5	0.8	100
2007–08	30.5	19.9	25.7	6.5	12.6	2.2	1.9	0.8	100
2008–09	30.9	19.5	25.9	6.8	12.3	2.1	1.9	0.6	100
2009–10	33.4	20.7	23.5	6.8	11.2	2.3	1.7	0.6	100
2010–11	33.8	19.6	23.6	7.0	11.5	2.2	1.6	0.6	100
2011–12	30.3	19.9	27.2	6.3	11.9	2.0	1.6	0.8	100
<i>Interstate^(b)</i>									
2006–07	23.0	19.0	28.3	6.9	8.3	4.9	5.7	3.8	100
2007–08	24.0	19.9	29.5	6.8	6.9	4.9	4.1	3.9	100
2008–09	23.9	21.9	26.8	7.7	6.6	4.7	4.6	3.8	100
2009–10	22.5	20.2	27.2	8.2	6.8	5.9	4.6	4.6	100
2010–11	25.7	23.1	25.7	7.4	6.5	4.4	3.5	3.7	100
2011–12	24.2	21.3	26.7	7.4	8.0	4.8	3.7	3.7	100
<i>International</i>									
2006–07	34.4	19.3	25.7	3.6	10.1	1.9	3.7	1.3	100
2007–08	33.8	19.7	24.7	4.3	11.1	1.9	3.2	1.3	100
2008–09	34.0	20.3	25.0	3.9	10.2	2.0	3.5	1.2	100
2009–10	32.6	21.5	24.0	4.5	10.8	1.9	3.2	1.5	100
2010–11	33.4	22.6	22.0	4.7	10.8	1.8	3.0	1.7	100
2011–12	32.6	23.1	22.2	4.2	11.7	1.8	2.5	1.8	100
<i>Total</i>									
2006–07	30.1	19.9	25.6	6.0	10.4	3.0	3.1	1.9	100
2007–08	30.3	20.6	26.0	5.8	9.9	3.0	2.5	1.9	100
2008–09	30.0	21.5	25.1	6.3	9.6	2.9	2.8	1.7	100
2009–10	30.2	21.5	24.5	6.5	9.3	3.3	2.7	2.1	100
2010–11	31.4	22.1	23.6	6.4	9.5	2.8	2.3	1.9	100
2011–12	29.5	22.0	25.2	6.1	10.3	2.8	2.3	1.9	100

^(a) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

^(b) Refers to domestic overnight intrastate and interstate travel.

Table 6: Direct tourism output by industry—basic prices and state share of total, 2011–12

Tourism output ^(a)	NSW		Vic		Qld		SA		WA		Tas		NT		ACT		Total ^(b)	
	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%		\$m
<i>Tourism characteristic industries</i>																		
Accommodation	3833	31.2	2035	16.5	3604	29.3	635	5.2	1256	10.2	318	2.6	330	2.7	288	2.3	12299	
Ownership of dwellings	1381	32.6	1057	24.9	826	19.5	346	8.2	417	9.8	108	2.5	33	0.8	69	1.6	4238	
Cafes, restaurants and takeaway food services	3290	31.0	1993	18.7	3021	28.4	612	5.8	950	8.9	338	3.2	235	2.2	188	1.8	10628	
Clubs, pubs, taverns & bars	1305	31.0	790	18.7	1198	28.4	243	5.8	377	8.9	134	3.2	93	2.2	74	1.8	4214	
Rail transport	263	27.0	192	19.7	258	26.4	60	6.2	116	11.9	29	3.0	39	3.9	19	2.0	976	
Taxi transport	239	29.1	211	25.7	204	24.8	53	6.5	67	8.2	23	2.8	12	1.5	12	1.4	822	
Other road transport	474	28.1	337	20.0	438	25.9	102	6.0	192	11.4	48	2.9	64	3.8	33	2.0	1689	
Air, water and other transport	4602	28.1	3275	20.0	4256	25.9	991	6.0	1864	11.4	471	2.9	622	3.8	324	2.0	16405	
Motor vehicle hiring	379	31.7	221	18.5	309	25.9	79	6.6	126	10.5	24	2.0	37	3.1	20	1.7	1194	
Travel agency and tour operator services	772	27.5	506	18.0	848	30.2	140	5.0	379	13.5	69	2.5	50	1.8	48	1.7	2811	
Cultural services	387	32.1	328	27.2	271	22.5	43	3.6	89	7.4	24	2.0	27	2.2	35	2.9	1203	
Casinos and other gambling services	158	19.2	280	34.0	209	25.4	30	3.6	107	13.0	12	1.5	15	1.9	11	1.4	823	
Other sports and recreation services	679	32.1	575	27.2	475	22.5	76	3.6	156	7.4	43	2.0	47	2.2	62	2.9	2112	
<i>Total tourism characteristic industries</i>	17762	29.9	11800	19.9	15916	26.8	3411	5.7	6096	10.3	1641	2.8	1605	2.7	1184	2.0	59414	
<i>Tourism connected industries</i>																		
Automotive fuel retailing	238	32.8	176	24.3	169	23.3	50	6.9	48	6.6	18	2.5	8	1.1	18	2.5	725	
Other retail	2533	31.0	1731	21.2	2220	27.2	432	5.3	750	9.2	211	2.6	137	1.7	161	2.0	8175	

trade																	
Education and training	1000	31.0	938	29.1	615	19.1	137	4.3	329	10.2	48	1.5	66	2.0	93	2.9	3227
<i>Total tourism connected industries</i>	3770	31.1	2845	23.5	3004	24.8	619	5.1	1127	9.3	277	2.3	211	1.7	272	2.2	12127
All other industries	1029	33.8	769	25.2	651	21.4	162	5.3	286	9.4	55	1.8	28	0.9	66	2.2	3046
Direct tourism output	22561	30.2	15414	20.7	19571	26.2	4193	5.6	7509	10.1	1973	2.6	1844	2.5	1522	2.0	74587

^(a) Regional shares for cafes, restaurants and takeaway food services and clubs, pubs, taverns and bars are the same as they could not be calculated separately. The same applies to other road transport and air, water and other transport, and also to cultural services and other sports and recreational services.

^(b) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

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Table 7: Direct tourism GVA by industry—state share of total, 2011–12

<i>Tourism characteristic industries</i>	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m
Accommodation	2049	31.5	1119	17.2	1849	28.5	345	5.3	684	10.5	161	2.5	148	2.3	145	2.2	6499
Ownership of dwellings	1049	32.6	803	24.9	627	19.5	263	8.2	317	9.8	82	2.5	25	0.8	53	1.6	3218
Cafes, restaurants and takeaway food services	1291	31.3	804	19.5	1138	27.6	245	5.9	380	9.2	126	3.0	77	1.9	69	1.7	4129
Clubs, pubs, taverns and bars	717	31.3	447	19.5	632	27.6	136	5.9	211	9.2	70	3.0	43	1.9	39	1.7	2295
Rail transport	135	26.6	84	16.5	146	28.7	32	6.4	67	13.2	16	3.1	21	4.0	8	1.5	509
Taxi transport	109	29.2	97	25.8	93	24.8	24	6.5	31	8.2	10	2.7	5	1.4	5	1.4	375
Other road transport	196	28.1	140	20.1	181	25.9	42	6.1	79	11.4	20	2.8	26	3.7	13	1.9	697
Air, water and other transport	1807	29.7	1213	20.0	1560	25.7	363	6.0	663	10.9	147	2.4	221	3.6	104	1.7	6079
Motor vehicle hiring	218	31.7	127	18.5	178	26.0	45	6.5	74	10.8	13	1.9	19	2.8	12	1.8	687
Travel agency and tour operator services	499	27.5	327	18.0	547	30.2	90	5.0	245	13.5	44	2.4	32	1.8	31	1.7	1815
Cultural services	174	34.1	147	28.6	109	21.3	17	3.4	36	7.0	9	1.7	6	1.2	14	2.7	512
Casinos and other gambling services	89	19.3	157	34.1	117	25.4	17	3.6	59	12.9	7	1.5	9	1.9	6	1.4	461
Other sports and recreation services	192	32.4	158	26.7	130	21.9	22	3.6	43	7.3	14	2.4	16	2.7	18	3.0	593
<i>Total tourism characteristic industries</i>	8525	30.6	5623	20.2	7308	26.2	1641	5.9	2888	10.4	718	2.6	648	2.3	517	1.9	27869
<i>Tourism connected industries</i>																	
Automotive fuel retailing	68	32.8	51	24.4	48	23.3	14	6.9	14	6.5	5	2.5	2	1.1	5	2.5	208
Other retail trade	1535	31.0	1052	21.2	1345	27.1	261	5.3	453	9.1	127	2.6	83	1.7	97	2.0	4953
Education and training	743	30.8	693	28.7	465	19.3	102	4.2	255	10.6	38	1.6	50	2.1	66	2.7	2410
<i>Total tourism connected industries</i>	2346	31.0	1796	23.7	1858	24.5	378	5.0	721	9.5	170	2.2	135	1.8	168	2.2	7571
All other industries	743	34.1	552	25.3	466	21.4	119	5.5	199	9.1	39	1.8	19	0.9	43	2.0	2181

Total GVA	11615	30.9	7971	21.2	9631	25.6	2138	5.7	3808	10.1	927	2.5	802	2.1	729	1.9	37621
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^(a) Regional shares for cafes, restaurants and takeaway food services and clubs, pubs, taverns and bars are the same as they were not able to be calculated separately.

^(b) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.

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Table 8: Direct tourism employment by industry and state share, 2011–12

Tourism employment ^(a)	NSW		Vic		Qld		SA		WA		Tas		NT		ACT		Total ^(b)	
	'000	%	'000	%	'000	%	'000	%	'000	%	'000	%	'000	%	'000	%	'000	
<i>Tourism characteristic and connected industries</i>																		
Accommodation	19.4	28.2	14.6	21.3	17.6	25.7	4.0	5.8	8.5	12.4	2.0	2.9	1.0	1.5	1.4	2.1	68.6	
Cafes, restaurants and takeaway food services	39.2	27.8	33.8	24.0	34.9	24.7	9.1	6.5	15.2	10.8	4.9	3.5	1.7	1.2	2.2	1.6	141.1	
Clubs, pubs, taverns and bars	9.2	27.8	7.9	24.0	8.2	24.7	2.1	6.5	3.6	10.8	1.2	3.5	0.4	1.2	0.5	1.6	33.1	
Rail transport	1.4	43.4	0.5	15.1	1.0	30.9	0.1	4.1	0.2	4.6	0.0	1.0	0.0	0.7	0.0	0.3	3.3	
Road transport and transport equipment rental	5.3	27.8	4.1	21.2	5.3	27.9	1.2	6.2	1.6	8.2	0.7	3.6	0.6	3.3	0.4	1.9	19.1	
Air, water and other transport	10.1	26.7	8.1	21.4	10.6	28.2	2.8	7.5	3.6	9.7	1.1	2.9	1.0	2.7	0.4	1.0	37.7	
Travel agency and tour operator services	8.9	27.5	6.2	19.2	10.0	30.8	1.8	5.6	3.6	11.2	1.0	3.1	0.4	1.3	0.4	1.3	32.4	
Cultural services	3.6	32.5	2.9	25.6	2.6	23.3	0.3	2.9	0.7	6.1	0.6	5.8	0.2	2.0	0.2	1.8	11.2	
Casinos and other gambling services	0.7	17.7	1.1	30.0	1.0	27.2	0.1	3.4	0.5	12.0	0.1	3.9	0.2	4.9	0.0	1.0	3.8	
Other sports and recreation services	5.3	26.3	5.6	27.4	6.0	29.6	0.7	3.5	1.7	8.5	0.4	1.8	0.2	1.0	0.4	1.9	20.3	
Retail trade	30.8	30.5	23.1	22.9	25.2	25.0	6.6	6.5	9.4	9.3	2.7	2.7	1.4	1.4	1.7	1.7	101.0	
Education and training	10.8	29.4	9.6	26.2	7.7	21.1	1.6	4.3	4.8	13.0	0.6	1.7	0.7	2.0	0.8	2.2	36.6	
<i>Total tourism characteristic and connected industries</i>	144.7	28.5	117.5	23.1	130.3	25.6	30.5	6.0	53.4	10.5	15.4	3.0	7.9	1.6	8.5	1.7	508.2	
All other industries	6.9	29.3	5.6	23.5	6.0	25.1	1.6	6.8	2.3	9.8	0.5	2.3	0.3	1.1	0.5	2.2	23.7	
Total tourism employment	152	28.5	123	23.1	136	25.6	32	6.0	56	10.5	16	3.0	8	1.5	9	1.7	532	

^(a) Regional shares for cafes, restaurants and takeaway food services and clubs, pubs, taverns and bars are the same as they could not be calculated separately.

^(b) National totals may differ slightly from those reported in the ABS Tourism Satellite Accounts due to rounding.
np - Not published

Table 9: Tourism consumption by product—purchasers' prices and state share of total, 2011–12

Tourism consumption	NSW		Vic		Qld		SA		WA		Tas		NT		ACT		Total
<i>Tourism characteristic products</i>	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%	\$m
Accommodation services	3806	31.1	2403	19.7	3178	26.0	678	5.5	1321	10.8	282	2.3	272	2.2	279	2.3	12219
Actual and imputed rent on dwellings	1381	32.6	1057	24.9	826	19.5	346	8.2	417	9.8	108	2.5	33	0.8	69	1.6	4238
Takeaway and restaurant meals	5079	30.8	3675	22.3	4106	24.9	1022	6.2	1555	9.4	476	2.9	286	1.7	276	1.7	16475
Taxi fares	227	26.4	198	23.1	211	24.6	53	6.1	81	9.5	40	4.7	27	3.1	21	2.5	857
Local area passenger transportation	270	31.1	210	24.1	211	24.2	36	4.1	85	9.8	23	2.6	21	2.4	14	1.6	870
Long distance passenger transportation	4337	24.4	3517	19.8	4539	25.5	1256	7.1	2290	12.9	678	3.8	757	4.3	409	2.3	17783
Motor vehicle hire and lease	401	25.9	320	20.7	397	25.6	119	7.7	167	10.8	56	3.6	60	3.9	27	1.7	1547
Travel agency and tour operator services	1030	28.3	669	18.3	1072	29.4	184	5.0	416	11.4	107	2.9	72	2.0	97	2.7	3646
Recreational, cultural and sporting services	1054	27.5	972	25.3	1108	28.9	131	3.4	286	7.4	111	2.9	106	2.8	67	1.7	3835
Gambling and betting services	406	26.8	387	25.6	424	28.0	50	3.3	160	10.5	37	2.5	32	2.1	19	1.2	1515
<i>Total tourism characteristic products</i>	17992	28.6	13409	21.3	16071	25.5	3874	6.2	6778	10.8	1918	3.0	1665	2.6	1278	2.0	62985
<i>Tourism connected products</i>																	
Shopping (including gifts and souvenirs)	4050	30.1	3186	23.7	3534	26.3	727	5.4	1173	8.7	334	2.5	205	1.5	242	1.8	13451
Food products	2213	31.5	1506	21.5	1759	25.1	405	5.8	678	9.7	197	2.8	143	2.0	115	1.6	7016
Alcoholic beverages and other beverages	1416	31.2	985	21.7	1124	24.8	288	6.3	448	9.9	119	2.6	85	1.9	71	1.6	4535

Motor vehicles, caravans, boats etc.	632	30.6	528	25.6	413	20.0	168	8.1	219	10.6	54	2.6	15	0.7	35	1.7	2063
Fuel (petrol, diesel)	3192	31.7	2177	21.6	2435	24.2	673	6.7	963	9.6	259	2.6	188	1.9	181	1.8	10067
Repair and maintenance of motor vehicles	148	30.4	116	23.8	131	26.9	18	3.6	52	10.7	8	1.7	7	1.4	8	1.6	486
Education services	967	32.0	839	27.7	587	19.4	125	4.1	341	11.3	45	1.5	59	2.0	63	2.1	3026
<i>Total tourism connected products</i>	12618	31.0	9337	23.0	9981	24.6	2404	5.9	3873	9.5	1017	2.5	700	1.7	714	1.8	40644
All other industries	861	29.5	670	22.9	756	25.9	175	6.0	304	10.4	65	2.2	36	1.2	58	2.0	2925
Total consumption	31472	29.5	23415	22.0	26809	25.2	6453	6.1	10955	10.3	2999	2.8	2402	2.3	2049	1.9	106554

Table 10: Indirect contribution of tourism, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
<i>Tourism output</i>	\$ million—basic prices								
2006–07	21539	13603	18286	4062	6699	2055	2061	1243	69550
2007–08	22413	14660	19503	4208	6831	2138	1907	1367	73027
2008–09	22142	14912	18667	4345	6422	2083	2079	1222	71871
2009–10	23243	15530	18967	4609	6485	2360	2058	1502	74755
2010–11	24369	16061	18622	4646	6639	2122	1855	1275	75691
2011–12	24452	16959	21003	4626	7707	2260	1882	1498	80388
<i>Gross value added</i>	\$ million								
2006–07	10776	7126	8829	2091	3341	980	911	575	34629
2007–08	11160	7627	9362	2136	3381	1006	829	620	36122
2008–09	10994	7770	8939	2221	3165	978	897	553	35518
2009–10	11523	8032	9052	2335	3185	1105	885	684	36800
2010–11	12000	8288	8846	2327	3244	994	789	623	37110
2011–12	12085	8749	10001	2333	3759	1062	816	680	39486
<i>Net Taxes on products</i>	\$ million								
2006–07	1741	1336	1215	301	523	133	70	144	5463
2007–08	1691	1332	1206	306	504	132	66	162	5399
2008–09	1702	1339	1207	304	473	132	74	146	5376
2009–10	1925	1545	1316	343	494	155	75	166	6018
2010–11	1847	1426	1232	324	482	139	66	161	5676
2011–12	2134	1737	1498	370	607	158	70	174	6747
<i>Gross state product</i>	\$ million								
2006–07	12517	8462	10044	2391	3864	1113	981	718	40092
2007–08	12850	8959	10569	2442	3886	1138	895	782	41520
2008–09	12696	9109	10146	2526	3638	1110	970	699	40894
2009–10	13448	9577	10368	2678	3679	1260	960	850	42819
2010–11	13847	9714	10077	2651	3726	1132	855	784	42787
2011–12	14219	10486	11499	2702	4366	1221	886	854	46232
<i>Employed persons</i>	'000								
2006–07	94	64	88	21	30	21	9	6	334
2007–08	97	68	93	22	30	21	8	6	347
2008–09	96	70	89	23	28	21	9	6	341
2009–10	99	71	89	24	28	22	8	7	348
2010–11	104	74	88	24	29	20	8	6	353
2011–12	105	78	99	24	33	22	8	7	377

Table 10 (Continued): Indirect contribution of tourism, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
	STATE SHARE OF TOTAL								
<i>Gross value added</i>	%								
2006–07	31.1	20.6	25.5	6.0	9.6	2.8	2.6	1.7	100
2007–08	30.9	21.1	25.9	5.9	9.4	2.8	2.3	1.7	100
2008–09	31.0	21.9	25.2	6.3	8.9	2.8	2.5	1.6	100
2009–10	31.3	21.8	24.6	6.3	8.7	3.0	2.4	1.9	100
2010–11	32.3	22.3	23.8	6.3	8.7	2.7	2.1	1.7	100
2011–12	30.6	22.2	25.3	5.9	9.5	2.7	2.1	1.7	100
<i>Gross state product</i>	%								
2006–07	31.2	21.1	25.1	6.0	9.6	2.8	2.4	1.8	100
2007–08	30.9	21.6	25.5	5.9	9.4	2.7	2.2	1.9	100
2008–09	31.0	22.3	24.8	6.2	8.9	2.7	2.4	1.7	100
2009–10	31.4	22.4	24.2	6.3	8.6	2.9	2.2	2.0	100
2010–11	32.4	22.7	23.6	6.2	8.7	2.6	2.0	1.8	100
2011–12	30.8	22.7	24.9	5.8	9.4	2.6	1.9	1.8	100
<i>Employed persons</i>	%								
2006–07	28.2	19.2	26.5	6.4	9.0	6.3	2.7	1.8	100
2007–08	28.1	19.7	26.9	6.3	8.7	6.1	2.3	1.9	100
2008–09	28.1	20.5	26.2	6.7	8.3	6.0	2.5	1.7	100
2009–10	28.4	20.4	25.5	6.8	8.1	6.4	2.4	2.0	100
2010–11	29.5	21.0	24.9	6.7	8.2	5.8	2.1	1.8	100
2011–12	27.9	20.7	26.4	6.3	8.9	5.9	2.1	1.9	100
	SHARE OF STATE ECONOMY								
<i>Gross value added</i>	%								
2006–07	3.4	3.1	4.5	3.2	2.6	5.1	7.4	2.8	3.5
2007–08	3.2	3.0	4.4	3.0	2.3	5.0	5.8	2.7	3.3
2008–09	3.0	3.0	3.7	3.0	1.9	4.8	5.7	2.2	3.0
2009–10	3.0	2.9	3.8	3.0	1.8	5.1	5.7	2.5	3.1
2010–11	3.0	2.9	3.5	2.8	1.5	4.4	4.8	2.2	2.8
2011–12	2.9	2.9	3.8	2.7	1.6	4.7	4.6	2.2	2.9
<i>Gross state product</i>	%								
2006–07	3.6	3.3	4.7	3.4	2.8	5.4	7.5	3.2	3.7
2007–08	3.4	3.3	4.6	3.1	2.5	5.2	5.9	3.2	3.5
2008–09	3.2	3.2	3.9	3.2	2.1	5.0	5.8	2.7	3.3
2009–10	3.3	3.2	4.1	3.2	2.0	5.4	5.9	3.0	3.3
2010–11	3.2	3.1	3.7	3.0	1.7	4.7	4.9	2.6	3.0
2011–12	3.1	3.2	4.1	2.9	1.8	5.0	4.8	2.7	3.1
<i>Employed persons</i>	%								
2006–07	2.8	2.5	4.2	2.8	2.7	9.3	8.5	3.1	3.2
2007–08	2.9	2.6	4.3	2.8	2.7	9.2	7.2	3.3	3.2
2008–09	2.8	2.6	4.0	2.9	2.4	8.6	7.5	2.9	3.1
2009–10	2.9	2.6	3.9	2.9	2.4	9.6	7.1	3.4	3.2
2010–11	2.9	2.6	3.8	2.9	2.4	8.6	6.3	3.1	3.1
2011–12	2.9	2.7	4.3	2.9	2.6	9.4	6.4	3.4	3.3

Table 11: Total effects of tourism consumption, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
<i>Consumption^(a)</i>	\$ million—basic prices								
2006–07	24300	15794	19969	4529	7601	2144	2144	1375	77855
2007–08	25356	17006	21202	4728	7825	2222	1994	1503	81836
2008–09	25228	17469	20491	4911	7384	2175	2152	1350	81160
2009–10	26420	18178	20808	5217	7539	2479	2126	1656	84423
2010–11	27684	18853	20489	5297	7710	2243	1937	1530	85742
2011–12	27832	19892	23009	5289	8887	2375	1966	1656	90906
<i>Total output</i>	\$ million—basic prices								
2006–07	45839	29397	38255	8591	14300	4199	4205	2619	147404
2007–08	47769	31666	40704	8936	14657	4360	3901	2870	154863
2008–09	47370	32381	39158	9256	13806	4258	4230	2572	153032
2009–10	49663	33708	39775	9826	14024	4839	4184	3159	159178
2010–11	52053	34914	39111	9943	14349	4365	3793	2805	161433
2011–12	52285	36851	44012	9916	16594	4636	3847	3154	171294
<i>Multiplier</i>									
2006–07	1.9	1.9	1.9	1.9	1.9	2.0	2.0	1.9	1.9
2007–08	1.9	1.9	1.9	1.9	1.9	2.0	2.0	1.9	1.9
2008–09	1.9	1.9	1.9	1.9	1.9	2.0	2.0	1.9	1.9
2009–10	1.9	1.9	1.9	1.9	1.9	2.0	2.0	1.9	1.9
2010–11	1.9	1.9	1.9	1.9	1.9	1.9	2.0	1.8	1.9
2011–12	1.9	1.9	1.9	1.9	1.9	2.0	2.0	1.9	1.9
<i>Total gross value added</i>	\$ million								
2006–07	20129	12876	16535	3741	6297	1754	1749	1142	64223
2007–08	21280	13965	17866	3880	6484	1827	1617	1238	68157
2008–09	21297	14566	17307	4140	6218	1810	1761	1122	68221
2009–10	22586	15284	17658	4456	6402	2076	1742	1418	71622
2010–11	23713	15893	17415	4489	6564	1882	1575	1292	72823
2011–12	23700	16720	19633	4471	7568	1989	1618	1408	77107
<i>Net Taxes on products</i>	\$ million								
2006–07	2612	1861	2001	456	809	213	170	201	8323
2007–08	2622	1908	2070	466	798	218	157	223	8464
2008–09	2630	1939	2036	475	758	216	173	201	8429
2009–10	2894	2164	2127	529	782	251	169	235	9152
2010–11	2888	2073	2046	514	779	225	153	222	8900
2011–12	3153	2418	2419	555	952	249	157	242	10145
<i>Total gross state product</i>	\$ million								
2006–07	22741	14737	18536	4197	7105	1968	1918	1343	72546
2007–08	23903	15873	19935	4347	7282	2046	1774	1462	76620
2008–09	23927	16505	19343	4615	6976	2027	1934	1323	76650
2009–10	25479	17448	19785	4985	7184	2328	1911	1654	80774
2010–11	26601	17966	19461	5003	7342	2108	1728	1514	81724
2011–12	26853	19138	22051	5026	8519	2239	1775	1651	87251
<i>Total employment</i>	'000								
2006–07	241	168	219	52	83	37	19	14	833
2007–08	248	178	230	52	82	37	17	15	860
2008–09	246	185	221	56	79	36	18	14	855
2009–10	252	189	218	58	77	40	18	16	867
2010–11	266	197	215	58	80	36	16	15	884
2011–12	257	201	236	56	89	38	16	16	908

Table 11 (Continued): Total effects of tourism consumption, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
	STATE SHARE OF TOTAL								
<i>Total gross value added</i>	%								
2006–07	31.3	20.0	25.7	5.8	9.8	2.7	2.7	1.8	100
2007–08	31.2	20.5	26.2	5.7	9.5	2.7	2.4	1.8	100
2008–09	31.2	21.4	25.4	6.1	9.1	2.7	2.6	1.6	100
2009–10	31.5	21.3	24.7	6.2	8.9	2.9	2.4	2.0	100
2010–11	32.6	21.8	23.9	6.2	9.0	2.6	2.2	1.8	100
2011–12	30.7	21.7	25.5	5.8	9.8	2.6	2.6	1.8	100
<i>Total gross state product</i>	%								
2006–07	31.3	20.3	25.6	5.8	9.8	2.7	2.6	1.9	100
2007–08	31.2	20.7	26.0	5.7	9.5	2.7	2.3	1.9	100
2008–09	31.2	21.5	25.2	6.0	9.1	2.6	2.5	1.7	100
2009–10	31.5	21.6	24.5	6.2	8.9	2.9	2.4	2.0	100
2010–11	32.6	22.0	23.8	6.1	9.0	2.6	2.1	1.9	100
2011–12	30.7	21.9	25.3	5.8	9.8	2.6	2.0	1.9	100
<i>Total employment</i>	%								
2006–07	28.9	20.1	26.3	6.3	9.8	4.4	2.3	1.7	100
2007–08	28.8	20.7	26.8	6.1	9.6	4.3	2.0	1.8	100
2008–09	28.8	21.6	25.9	6.5	9.1	4.2	2.2	1.6	100
2009–10	29.0	21.8	25.1	6.7	8.9	4.6	2.0	1.9	100
2010–11	30.1	22.3	24.4	6.6	9.1	4.1	1.8	1.7	100
2011–12	28.2	22.1	25.9	6.1	9.8	4.2	1.8	1.8	100
	SHARE OF STATE ECONOMY								
<i>Total gross value added</i>	%								
2006–07	6.3	5.5	8.4	5.7	4.8	9.2	14.2	5.5	6.4
2007–08	6.2	5.5	8.3	5.4	4.4	9.1	11.3	5.4	6.3
2008–09	5.9	5.6	7.1	5.6	3.7	8.9	11.2	4.5	5.8
2009–10	6.0	5.6	7.5	5.8	3.7	9.5	11.3	5.2	6.0
2010–11	5.9	5.5	6.9	5.4	3.1	8.3	9.6	4.5	5.6
2011–12	5.6	5.5	7.4	5.2	3.3	8.8	9.1	4.6	5.6
<i>Total gross state product</i>	%								
2006–07	6.5	5.8	8.7	5.9	5.1	9.5	14.7	6.0	6.7
2007–08	6.4	5.8	8.6	5.6	4.7	9.3	11.8	6.0	6.5
2008–09	6.1	5.8	7.5	5.8	4.0	9.2	11.6	5.1	6.1
2009–10	6.2	5.9	7.8	6.0	4.0	9.9	11.7	5.8	6.3
2010–11	6.1	5.7	7.2	5.6	3.3	8.7	10.0	5.0	5.8
2011–12	5.9	5.8	7.8	5.5	3.6	9.3	9.6	5.1	5.9
<i>Total employment</i>	%								
2006–07	7.3	6.5	10.3	6.8	7.6	16.4	18.1	7.4	8.0
2007–08	7.3	6.7	10.5	6.7	7.2	16.1	15.3	7.7	8.0
2008–09	7.2	6.9	9.8	7.0	6.6	15.2	15.8	7.0	7.8
2009–10	7.3	6.9	9.6	7.2	6.5	17.1	14.8	8.2	7.9
2010–11	7.5	6.9	9.4	7.2	6.6	15.4	13.0	7.3	7.8
2011–12	7.2	7.0	10.1	6.8	7.0	16.2	13.1	7.8	8.0

Table 12: State totals of key economic aggregates, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
	STATE TOTAL								
<i>Gross value added</i>	\$ million								
2006–07	321634	232118	197143	65209	130243	19071	12315	20794	998527
2007–08	344750	251661	214182	71451	146132	20188	14332	22790	1085486
2008–09	363148	260511	243587	74027	168836	20443	15790	24652	1170994
2009–10	378051	273237	235859	77237	173330	21814	15432	27021	1201981
2010–11	402889	289977	253199	82831	213614	22549	16488	28818	1310365
2011–12	421229	302521	265840	85395	230136	22481	17725	30622	1375949
<i>Gross state product</i>	\$ million								
2006–07	350591	254177	212856	71105	138542	20709	13044	22277	1083303
2007–08	374816	275631	230927	77762	154840	21913	15095	24337	1175321
2008–09	391662	282945	258746	79998	176143	22095	16625	26078	1254293
2009–10	409199	297399	252398	83401	181566	23490	16280	28582	1292315
2010–11	435547	315571	269880	89322	221574	24218	17322	30455	1403888
2011–12	455275	328595	283604	91928	238870	24175	18583	32197	1473227
<i>Employed persons</i>	'000								
2006–07	3308	2577	2121	765	1095	224	105	194	10388
2007–08	3403	2662	2187	782	1137	231	111	196	10708
2008–09	3426	2687	2253	796	1185	239	117	197	10899
2009–10	3453	2754	2260	800	1183	232	120	200	11003
2010–11	3559	2841	2298	811	1219	236	121	204	11288
2011–12	3581	2859	2328	817	1266	234	122	206	11413

Note: For information on the contribution tourism makes directly, indirectly and overall to each of these key economic aggregates at a state and national level, refer to Tables 1, 10 and 11 respectively.

Table 13: Key economic aggregates by state and tourism share, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
	TOURISM SHARE – DIRECT								
<i>Gross value added</i>	%								
2006–07	2.9	2.5	3.9	2.5	2.3	4.1	6.8	2.7	3.0
2007–08	2.9	2.5	4.0	2.4	2.1	4.1	5.5	2.7	3.0
2008–09	2.8	2.6	3.4	2.6	1.8	4.1	5.5	2.3	2.8
2009–10	2.9	2.6	3.7	2.7	1.9	4.4	5.6	2.7	2.9
2010–11	2.9	2.6	3.4	2.6	1.6	3.9	4.8	2.3	2.7
2011–12	2.8	2.6	3.6	2.5	1.7	4.1	4.5	2.4	2.7
<i>Gross state product</i>	%								
2006–07	2.9	2.5	4.0	2.5	2.3	4.1	7.2	2.8	3.0
2007–08	2.9	2.5	4.1	2.4	2.2	4.1	5.8	2.8	3.0
2008–09	2.9	2.6	3.6	2.6	1.9	4.1	5.8	2.4	2.9
2009–10	2.9	2.6	3.7	2.8	1.9	4.5	5.8	2.8	2.9
2010–11	2.9	2.6	3.5	2.6	1.6	4.0	5.0	2.4	2.8
2011–12	2.8	2.6	3.7	2.5	1.7	4.2	4.8	2.5	2.8
<i>Employed persons</i>	%								
2006–07	4.4	4.0	6.2	4.0	4.8	7.1	9.6	4.3	4.8
2007–08	4.4	4.1	6.3	3.9	4.6	6.9	8.1	4.4	4.8
2008–09	4.4	4.3	5.9	4.1	4.2	6.6	8.4	4.0	4.7
2009–10	4.4	4.3	5.7	4.3	4.2	7.5	7.8	4.8	4.7
2010–11	4.6	4.3	5.5	4.2	4.2	6.7	6.7	4.2	4.7
2011–12	4.2	4.3	5.9	3.9	4.4	6.8	6.7	4.4	4.7
	TOURISM SHARE – INDIRECT								
<i>Gross value added</i>	%								
2006–07	3.4	3.1	4.5	3.2	2.6	5.1	7.4	2.8	3.5
2007–08	3.2	3.0	4.4	3.0	2.3	5.0	5.8	2.7	3.3
2008–09	3.0	3.0	3.7	3.0	1.9	4.8	5.7	2.2	3.0
2009–10	3.0	2.9	3.8	3.0	1.8	5.1	5.7	2.5	3.1
2010–11	3.0	2.9	3.5	2.8	1.5	4.4	4.8	2.2	2.8
2011–12	2.9	2.9	3.8	2.7	1.6	4.7	4.6	2.2	2.9
<i>Gross state product</i>	%								
2006–07	3.6	3.3	4.7	3.4	2.8	5.4	7.5	3.2	3.7
2007–08	3.4	3.3	4.6	3.1	2.5	5.2	5.9	3.2	3.5
2008–09	3.2	3.2	3.9	3.2	2.1	5.0	5.8	2.7	3.3
2009–10	3.3	3.2	4.1	3.2	2.0	5.4	5.9	3.0	3.3
2010–11	3.2	3.1	3.7	3.0	1.7	4.7	4.9	2.6	3.0
2011–12	3.1	3.2	4.1	2.9	1.8	5.0	4.8	2.7	3.1
<i>Employed persons</i>	%								
2006–07	2.8	2.5	4.2	2.8	2.7	9.3	8.5	3.1	3.2
2007–08	2.9	2.6	4.3	2.8	2.7	9.2	7.2	3.3	3.2
2008–09	2.8	2.6	4.0	2.9	2.4	8.6	7.5	2.9	3.1
2009–10	2.9	2.6	3.9	2.9	2.4	9.6	7.1	3.4	3.2
2010–11	2.9	2.6	3.8	2.9	2.4	8.6	6.3	3.1	3.1
2011–12	2.9	2.7	4.3	2.9	2.7	9.3	6.5	3.4	3.3
	TOURISM SHARE – TOTAL								

<i>Gross value added</i>	%								
2006–07	6.3	5.5	8.4	5.7	4.8	9.2	14.2	5.5	6.4
2007–08	6.2	5.5	8.3	5.4	4.4	9.1	11.3	5.4	6.3
2008–09	5.9	5.6	7.1	5.6	3.7	8.9	11.2	4.5	5.8
2009–10	6.0	5.6	7.5	5.8	3.7	9.5	11.3	5.2	6.0
2010–11	5.9	5.5	6.9	5.4	3.1	8.3	9.6	4.5	5.6
2011–12	5.6	5.5	7.4	5.2	3.3	8.8	9.1	4.6	5.6
<i>Gross state product</i>	%								
2006–07	6.5	5.8	8.7	5.9	5.1	9.5	14.7	6.0	6.7
2007–08	6.4	5.8	8.6	5.6	4.7	9.3	11.8	6.0	6.5
2008–09	6.1	5.8	7.5	5.8	4.0	9.2	11.6	5.1	6.1
2009–10	6.2	5.9	7.8	6.0	4.0	9.9	11.7	5.8	6.3
2010–11	6.1	5.7	7.2	5.6	3.3	8.7	10.0	5.0	5.8
2011–12	5.9	5.8	7.8	5.5	3.6	9.3	9.6	5.1	5.9
<i>Employed persons</i>	%								
2006–07	7.3	6.5	10.3	6.8	7.6	16.4	18.1	7.4	8.0
2007–08	7.3	6.7	10.5	6.7	7.2	16.1	15.3	7.7	8.0
2008–09	7.2	6.9	9.8	7.0	6.6	15.2	15.8	7.0	7.8
2009–10	7.3	6.9	9.6	7.2	6.5	17.1	14.8	8.2	7.9
2010–11	7.5	6.9	9.4	7.2	6.6	15.4	13.0	7.3	7.8
2011–12	7.2	7.0	10.1	6.8	7.0	16.2	13.1	7.8	8.0

Table 14: Industry^(a) shares of key economic aggregates by state, 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
	SHARE OF STATE TOTAL								
<i>Gross value added</i>	%								
Agriculture, forestry and fishing	1.6	2.7	2.7	5.7	1.4	7.9	2.9	0.1	2.4
Mining	3.4	2.5	11.1	4.7	35.9	1.8	20.7	0.1	10.3
Manufacturing	8.3	9.0	7.5	9.3	5.0	8.1	5.8	1.4	7.6
Construction	5.3	6.2	9.0	7.3	12.2	7.1	12.1	10.6	7.7
Financial and insurance services	15.3	13.8	6.7	9.8	3.8	8.6	3.5	4.0	10.5
Professional, scientific and technical services	8.0	8.6	6.0	5.6	5.5	3.6	3.2	9.8	7.1
Education & training	4.8	5.5	4.4	5.1	2.7	6.9	3.6	6.8	4.6
Health care & social assistance	6.5	7.0	6.6	7.8	4.0	9.6	5.8	6.0	6.3
Tourism – Direct	2.8	2.3	3.1	2.3	1.4	3.4	4	2.1	2.4
Tourism – Total	5.6	5.5	7.4	5.2	3.3	8.8	9.1	4.6	5.6
<i>Employed persons</i>									
Agriculture, forestry and fishing	2.3	2.8	3.3	5.1	2.8	5.7	3.2	0.2	2.9
Mining	1.3	0.5	2.8	1.3	8.3	1.8	3.4	0.1	2.2
Manufacturing	7.8	10.6	7.7	9.3	7.3	6.9	2.7	1.7	8.4
Construction	8.3	8.8	9.9	8.3	10.0	8.6	10.3	6.9	8.9
Financial and insurance services	5.0	4.0	2.8	3.4	2.3	2.4	1.8	1.8	3.7
Professional, scientific and technical services	8.8	8.4	6.5	6.0	7.5	4.7	5.5	9.9	7.8
Education & training	7.2	7.9	7.6	7.9	7.3	8.8	9.3	8.9	7.6
Health care & social assistance	11.8	11.6	12.0	12.7	11.0	13.7	11.1	9.3	11.8
Tourism – Direct	4.2	4.3	5.9	3.9	4.4	6.8	6.7	4.4	4.7
Tourism – Total	7.2	7.0	10.1	6.8	7.0	16.2	13.1	7.8	8.0

^(a) For a selection of industry sectors in the economy.

Table 15: Key direct tourism aggregate results, domestic, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
	LEVEL								
<i>Tourism consumption</i>	\$ million—purchaser's prices								
2006–07	19841	13907	17634	4673	7250	2301	1991	1455	69052
2007–08	21037	15301	19155	4815	7279	2381	1781	1595	73345
2008–09	20590	15772	18123	5094	6762	2276	1893	1380	71891
2009–10	21768	15886	18246	5275	6568	2732	1901	1705	74081
2010–11	23010	16398	18018	5268	6751	2349	1562	1423	74779
2011–12	23135	17506	21125	5387	7969	2530	1760	1594	81006
<i>Direct tourism output</i>	\$ million—basic prices								
2006–07	13196	8456	12132	2781	4530	1409	1380	998	44883
2007–08	14118	9309	13326	2857	4542	1492	1300	1078	48021
2008–09	13833	9549	12497	3062	4318	1432	1379	952	47023
2009–10	15050	9995	12808	3289	4396	1718	1373	1188	49818
2010–11	15960	10308	12859	3343	4480	1526	1214	1011	50702
2011–12	15876	10937	14859	3367	5297	1604	1316	1127	54384
<i>Direct tourism GVA</i>	\$ million								
2006–07	6343	4077	5563	1351	2148	628	578	445	21133
2007–08	6917	4546	6298	1376	2164	668	546	479	22994
2008–09	6904	4791	5982	1539	2122	663	585	428	23014
2009–10	7665	5064	6205	1675	2185	797	586	561	24739
2010–11	8117	5209	6245	1683	2247	717	516	470	25203
2011–12	8033	5503	7235	1695	2634	750	567	522	26940
	STATE SHARE OF TOTAL								
<i>Tourism consumption</i>	%								
2006–07	28.7	20.1	25.5	6.8	10.5	3.3	2.9	2.1	100
2007–08	28.7	20.9	26.1	6.6	9.9	3.2	2.4	2.2	100
2008–09	28.6	21.9	25.2	7.1	9.4	3.2	2.6	1.9	100
2009–10	29.4	21.4	24.6	7.1	8.9	3.7	2.6	2.3	100
2010–11	30.8	21.9	24.1	7.0	9.0	3.1	2.1	1.9	100
2011–12	28.6	21.6	26.1	6.7	9.8	3.1	2.2	2.0	100
<i>Direct tourism output</i>	%								
2006–07	29.4	18.8	27.0	6.2	10.1	3.1	3.1	2.2	100
2007–08	29.4	19.4	27.7	5.9	9.5	3.1	2.7	2.2	100
2008–09	29.4	20.3	26.6	6.5	9.2	3.0	2.9	2.0	100
2009–10	30.2	20.1	25.7	6.6	8.8	3.4	2.8	2.4	100
2010–11	31.5	20.3	25.4	6.6	8.8	3.0	2.4	2.0	100
2011–12	29.2	20.1	27.3	6.2	9.7	2.9	2.4	2.1	100
<i>Direct tourism GVA</i>	%								
2006–07	30.0	19.3	26.3	6.4	10.2	3.0	2.7	2.1	100
2007–08	30.1	19.8	27.4	6.0	9.4	2.9	2.4	2.1	100
2008–09	30.0	20.8	26.0	6.7	9.2	2.9	2.5	1.9	100
2009–10	31.0	20.5	25.1	6.8	8.8	3.2	2.4	2.3	100
2010–11	32.2	20.7	24.8	6.7	8.9	2.8	2.0	1.9	100
2011–12	29.8	20.4	26.9	6.3	9.8	2.8	2.1	1.9	100

Table 16: Key direct tourism aggregate results, international, 2006–07 to 2011–12

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT	Total
	LEVEL								
<i>Tourism consumption</i>	\$ million—purchaser's prices								
2006–07	7336	4113	5478	777	2144	411	789	268	21317
2007–08	7569	4414	5544	955	2482	428	712	302	22406
2008–09	7985	4761	5860	919	2394	459	813	287	23478
2009–10	7857	5176	5769	1075	2608	463	764	361	24072
2010–11	8348	5647	5508	1167	2705	446	760	435	25017
2011–12	8337	5909	5684	1065	2986	470	642	456	25548
<i>Direct tourism output</i>	\$ million—basic prices								
2006–07	5875	3175	4438	608	1592	318	622	248	16877
2007–08	6102	3392	4483	737	1831	331	566	280	17723
2008–09	6392	3679	4764	715	1779	355	637	275	18596
2009–10	6305	3973	4720	829	1940	356	613	330	19065
2010–11	6702	4325	4582	899	2014	353	614	383	19871
2011–12	6685	4477	4712	826	2212	369	528	395	20203
<i>Direct tourism GVA</i>	\$ million								
2006–07	3011	1674	2143	300	807	146	259	122	8461
2007–08	3204	1791	2205	368	939	154	241	140	9041
2008–09	3398	2005	2386	380	932	169	279	140	9689
2009–10	3397	2188	2401	445	1032	174	271	173	10082
2010–11	3596	2396	2324	480	1073	172	269	200	10510
2011–12	3581	2468	2396	443	1174	177	234	207	10681
	STATE SHARE OF TOTAL								
<i>Tourism consumption</i>	%								
2006–07	34.4	19.3	25.7	3.6	10.1	1.9	3.7	1.3	100
2007–08	33.8	19.7	24.7	4.3	11.1	1.9	3.2	1.3	100
2008–09	34.0	20.3	25.0	3.9	10.2	2.0	3.5	1.2	100
2009–10	32.6	21.5	24.0	4.5	10.8	1.9	3.2	1.5	100
2010–11	33.4	22.6	22.0	4.7	10.8	1.8	3.0	1.7	100
2011–12	32.6	23.1	22.2	4.2	11.7	1.8	2.5	1.8	100
<i>Direct tourism output</i>	%								
2006–07	34.8	18.8	26.3	3.6	9.4	1.9	3.7	1.5	100
2007–08	34.4	19.1	25.3	4.2	10.3	1.9	3.2	1.6	100
2008–09	34.4	19.8	25.6	3.8	9.6	1.9	3.4	1.5	100
2009–10	33.1	20.8	24.8	4.3	10.2	1.9	3.2	1.7	100
2010–11	33.7	21.8	23.1	4.5	10.1	1.8	3.1	1.9	100
2011–12	33.1	22.2	23.3	4.1	10.9	1.8	2.6	2.0	100
<i>Direct tourism GVA</i>	%								
2006–07	35.6	21.5	23.5	4.3	9.9	1.8	2.7	1.7	100
2007–08	35.4	19.8	24.5	3.8	10	1.8	2.6	1.5	100
2008–09	35.1	20.9	24	3.9	9.7	1.8	2.8	1.6	100
2009–10	33.7	22.0	23.0	4.4	9.9	1.7	2.5	1.8	100
2010–11	34.2	22.5	21.3	4.5	10.3	1.7	2.4	2.0	100
2011–12	33.5	23.1	22.4	4.2	11.0	1.7	2.2	1.9	100

Explanatory notes

Notes on the TSA conceptual framework

The following organisations jointly developed the framework for the TSA:

- Commission of the European Communities
- Organisation for Economic Co-operation and Development (OECD)
- United Nations World Tourism Organization (UNWTO)
- World Travel and Tourism Council (WTTC).

It was approved by the United Nations Statistical Commission (EUROSTAT et al. 2000) and has been revised in UNWTO (2008) and Tourism Satellite Accounts: Recommended Methodological Framework (2008). The framework has been widely applied in Australia and internationally, so the recommended methodology for TSAs is not reproduced in this report.

Methodology and data sources

Direct contribution of tourism

The approach that has been adopted to derive the direct contribution of tourism in the state TSAs is similar to that developed by Pham et al. (2009). Essentially, tourism expenditure data and state/territory industry input–output (I-O) data are combined with the national TSA benchmark. This ensures both the supply of and the demand for tourism at the state level are captured.

The main data sources are:

- unpublished modelled regional expenditure data from the TRA International Visitor Survey (IVS) and National Visitor Survey (NVS)
- the I-O database from The Enormous Regional Model (TERM) (Horridge, Madden & Wittwer, 2003)
- the national TSA produced by the Australian Bureau of Statistics (ABS, 2011).

Regional expenditure data are used to derive tourism consumption, or demand, in each state. The regional I-O database provides the cost structure and all required information to derive the supply side of the tourism sector in the state TSAs.

The supply and demand elements of the state TSAs data are then reconciled with the national TSA benchmark so that the summing conditions between state and national levels are satisfied. Reconciliation is required because the sum of

state expenditure data is not equal to the national TSA produced by the ABS. The main reason for this difference is that the ABS makes an upward adjustment to tourism expenditure to derive the national TSA data. Unfortunately, the equivalent information necessary to apply an upward adjustment to the state tourism expenditure is not available. Importantly, the relativity of state differences captured from the regional I-O database and regional expenditure patterns is maintained when reconciling the state TSAs data to the national target.

Indirect and total contribution of tourism

The indirect effects of tourism demand on businesses that provide goods and services to the tourism industry have also been measured. For example, the indirect tourism demand generated from supplying a meal to a visitor starts with the production of what the restaurant needs to make the meal, such as fresh produce and electricity for cooking.

This approach complements the direct effects presented through the TSA framework and provides a clearer picture of the total contribution of tourism to the economy. However, as the TSA framework is not designed to measure these indirect effects at state and territory level, they have been calculated using I-O analysis methods.

The I-O analysis methods provide a breakdown of the supply and demand of commodities in the Australian economy. As the tourism sector by nature does not have its own multiplier, the multipliers for other industries are used as the basis for calculating tourism's indirect effects. The multipliers measure the individual contribution of the industries associated with supplying goods and services to tourists and thus provide estimates of the flow-on effects for tourism output, tourism GVA, tourism GSP and tourism employment.

Table 11, presented earlier in this report, includes the state and territory and national multipliers used in estimating total tourism output. The national multipliers for tourism output, along with the GVA to output and employment to output ratios, have been derived from the latest available I-O data from the ABS, the 2006–07 I-O tables published in late 2010.

The equivalent state and territory output multipliers and state-specific industry level GVA to output and employment to output ratios have been derived from the TERM I-O database. This database is widely used in Australia, is the only source available for this information at the state and territory level and is based on 2004–05 data. The same state multipliers and the associated ratios have been applied to all TSA years (2006–07, 2007–08, 2008–09, 2009–10 and 2010–11) presented in this report.

Regional expenditure

As indicated in the previous section, state TSAs data are based on TRA *modelled regional expenditure estimates*, which were derived from IVS and NVS data. The

survey data are allocated to tourism regions using an iterative procedure (TRA, 2011). Essentially, the technique takes into account visitors' reported expenditure on their entire trip in Australia, relative to the nights they spend in different tourism regions in Australia.

The estimates derived from the regional expenditure model show there are considerable differences in expenditure patterns across states and territories. As a key input to the state TSAs, they are therefore an important contributor in shaping the patterns evident in the estimates of each state and territory and the shares attributed to specific tourism characteristic and tourism connected industries in each state and territory.

Importantly, it should be recognised that as the modelled regional expenditure figures are derived from survey data, there can be some volatility in these estimates. This is particularly the case for smaller states and territories and expenditure categories with lower levels of expenditure.

Tourism consumption and output

The modelled tourism expenditure estimates which are used as an input to the state TSAs are measured at purchasers' prices. This includes the following components that are not directly related to industries producing goods and services for tourism purposes:

- imports
- wholesale, retail margins, and transports (margins)
- net commodity taxes.

Consumption represents the demand side of tourism, with visitors paying a final price for goods and services. Thus consumption in this report is generally measured in purchasers' prices (Tables 5 and 9) to reflect the full price paid by tourists for goods and services. Most consumption data in the national account and state TSAs are presented in the same way.

However, in order to measure flow-on effects correctly, it is necessary to use consumption measured at basic prices. If consumption were measured at purchasers' prices, flow-on effects would be over-estimated by the inclusion of values (such as imports) which are not related directly to domestic production. For this reason, Table 11 presents tourism consumption at basic prices.

Tourism output measures how much demand is satisfied by domestic industries. Often, output is less than total consumption (at purchasers' prices) due to the amount of imports, commodity taxes and any associated margins that are required to facilitate the transfer of goods and services from producers to tourists. Road and rail transport and the wholesale and retail sectors are good examples of this. Only at basic prices is consumption equal to output of the producing industry, as all add-on components paid by the consumers are removed (noting the amounts of margins that are re-allocated to the applicable industries to reflect their contribution to tourism consumption explicitly).

It is also important to note that within the basic prices category not all goods and services are now defined as direct output in the new TSA framework. As indicated previously, the output of an industry is defined as direct tourism output only when the industry has physical contact with tourists (for example, cafes, restaurants and accommodation). Items like fuel are not direct tourism outputs. For example, if a tourist spends \$98 to fill up their petrol tank, and \$80 is the cost of fuel and \$18 is the cost to run the petrol station, then only \$18 is recorded as direct tourism output associated with the retail industry. The remaining \$80 is considered to be the cost to the retailer of the domestic good sold to tourists and would be captured in the flow-on effects to account for the value-adding tourism has generated in the domestic economy.

Backcasting

The national benchmark data for the back-cast years (2006–07, 2007–08, 2008–09, 2009–10 and 2010–11) were obtained from the 2011–12 TSA while regional expenditure data were collated for each of these years. In addition, to calculate the relativity of the direct and indirect contributions to associated conventional Australian and New Zealand Standard Industrial Classification (ANZSIC) industries, current price GVA data (i.e. in nominal terms) from relevant issues of the Australian National Accounts: State Accounts (ABS Cat. No. 5220.0) were used.

Glossary

Basic price: The amount receivable by the producer from the purchaser for a unit of a good or service prior to any additional costs such as net commodity taxes or any margins required to facilitate transfer of the goods and services from the producer to the tourists. These additional costs are paid by consumers but received by other industries (transport) and government (tax revenue).

Direct contribution of tourism: The contribution generated by transactions between the visitor and producer for a good or service that involves a direct physical or economic relationship. For example, the direct effects of an increase in the number of visitors staying in hotel accommodation are the sales and any associated changes in payments for wages and salaries, taxes and supplies and services. These direct economic impacts are measured according to the TSA framework throughout this report.

Employed person: A person aged 15 years or over who during the reference week worked for one hour or more for pay, profit, commission or payment in kind in a job or business or on a farm, or worked for one hour or more without pay in a family business or on a farm. Direct and indirect tourism employment are measured separately using the TSA framework and I-O modelling techniques respectively. Combined they provide an estimate of total tourism employment.

Indirect contribution of tourism: The subsequent or flow-on effects created by the requirement for inputs from those industries supplying goods and services to tourists. For example, in the case of the hotel industry this might include the fresh produce supplied to a hotel and the electricity used. These indirect economic impacts are measured using I-O modelling techniques in this report as the TSA framework is not designed to produce such estimates at the state and territory level.

International tourism: Overseas visitors to Australia for a period of less than 12 months.

Interstate travel: Domestic overnight travel where a visitor travels to a state or territory other than that in which they reside.

Intrastate travel: Domestic overnight travel where a visitor travels to a location in the state or territory in which they reside.

Net taxes on products: The combined taxes or subsidies on a product, payable per unit of a good or service. These usually become payable when the product is sold or imported but they may also become payable in other circumstances such as when a good is exported.

Purchaser's price: The amount payable by the purchaser (excluding any deductible tax) to take delivery of a unit of a good or service at the time and place they require it. This includes any transport charges paid separately to take delivery of the good or service.

Same-day travel: Domestic travel involving a round trip distance of at least 50 kilometres and at least four hours, and no nights spent away from home.

Same-day travel as part of overnight travel is excluded, as is routine travel such as commuting between work or school and home.

Total contribution of tourism: The total contribution of tourism taking into account direct and indirect effects (see direct contribution of tourism and indirect contribution of tourism).

Tourism characteristic industries: Industries that would either cease to exist in their present form or 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 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. 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: Products that would either cease to exist in their present form or be significantly affected if tourism were to cease, 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 to facilitate international comparison. In the Australian TSA, for a product to be a country-specific tourism characteristic, at least 25 per cent of the output of the product must be consumed by visitors.

Tourism connected industries: Industries, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All 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 GVA and direct tourism GDP.

Tourism connected products: Products that are consumed by visitors but are not considered as tourism characteristic products.

Tourism consumption: The total value of tourism goods and services consumed by residents and visitors from overseas in Australia. It includes household, business and government tourism consumption. It represents the price paid by the visitor (which therefore includes taxes and subsidies) and is measured in purchasers' prices.

Tourism gross state product: Tourism GVA plus net taxes on products that are attributable to the tourism industry. As such it generally has a higher value than tourism GVA. Direct and indirect flow-on GSP are measured separately

using the TSA framework and I-O modelling techniques respectively. Combined they provide an estimate of total tourism GSP.

Tourism gross value added: Considered the most accurate measure of the contribution of the industry to the economy. It includes the total labour income and capital revenue received by the industry and the net taxes that government receives from the production, and is measured in basic prices. Direct and indirect flow-on GVA are measured separately using the TSA framework and I-O modelling techniques respectively. Combined they provide an estimate of total tourism GVA.

Tourism output: The total value of goods and services produced in Australia to satisfy visitor consumption. It is measured in basic prices, so it excludes net taxes on tourism products. Direct and indirect flow-on outputs are measured separately using the TSA framework and I-O modelling techniques respectively. Combined they provide an estimate of total tourism output.

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