



TOURISM SATELLITE ACCOUNT 2012–13

SUMMARY OF KEY RESULTS

A Tourism Satellite Account (TSA) is recognised internationally as the benchmark for estimating the economic contribution of tourism in an economy. The Australian TSA is published each year, and provides measures of tourism gross domestic product (GDP), tourism gross value added (GVA), tourism trade, and employment in tourism. This edition of the TSA includes, for the first time, estimates for hours worked by persons working in the Australian tourism industry.

The Australian TSA is funded by the Australian Trade Commission (AUSTRADE). The 2012–13 TSA was published on 19 December 2013 and is available at: www.abs.gov.au

TOURISM GROSS DOMESTIC PRODUCT (GDP)

In 2012–13, direct tourism GDP¹ increased 3.7 per cent (or \$1.5 billion) to \$42.3 billion. Over the same period, the Australian economy grew at a slower rate (up 2.4 per cent). Tourism's share of total GDP increased marginally to 2.8 per cent (Figure 1).

Over the period 1997–98 to 2012–13, direct tourism GDP increased \$23.8 billion (or by 128.5 per cent, or an average annual growth rate of 5.7 per cent).

Domestic tourism GDP increased 3.2 per cent (or \$1.0 billion) to \$30.8 billion in 2012–13. Domestic tourism was responsible for 73 per cent of total direct tourism GDP in 2012–13. International tourism GDP increased 5.2 per cent (or \$0.6 billion) to \$11.4 billion in 2012–13. International tourism was responsible for 27 per cent of total direct tourism GDP.

TOURISM GROSS VALUE ADDED (GVA)

In 2012–13, direct tourism GVA increased 3.8 per cent (or \$1.4 billion) to \$38.8 billion. Direct GVA increased for each of the main tourism industries: *Accommodation* up 4.8 per cent to \$6.9 billion; *Cafes, restaurants and takeaway food services* increased 1.6 per cent to \$4.2 billion; *Rail, taxi, air, water and other transport* increased 2.7 per cent to \$7.5 billion; *Other retail trade* increased 3.8 per cent to \$5.2 billion; and *Education and training* increased 2.5 per cent to \$2.5 billion (Figure 2).

¹ Tourism Research Australia (TRA) also estimates the indirect and total contribution of tourism to the Australian economy in the *Tourism's Contribution to the Australian Economy* publication (see www.tra.gov.au).

KEY TOURISM AGGREGATES

Figure 1: Growth in tourism industry Gross Domestic Product

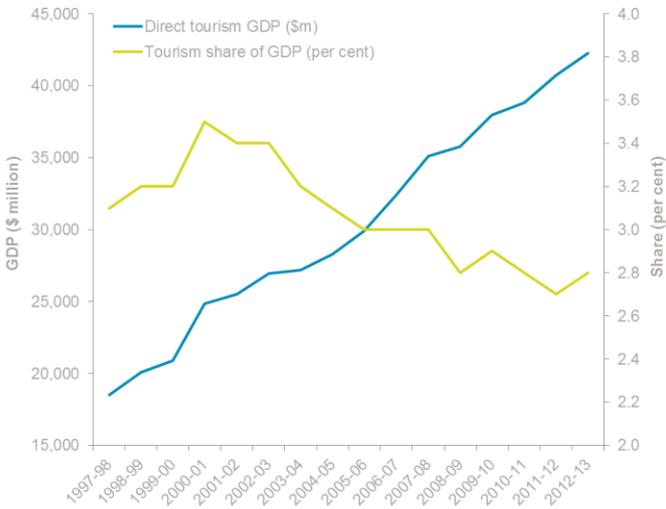


Figure 2: Growth in tourism industry Gross Value Added, selected industries

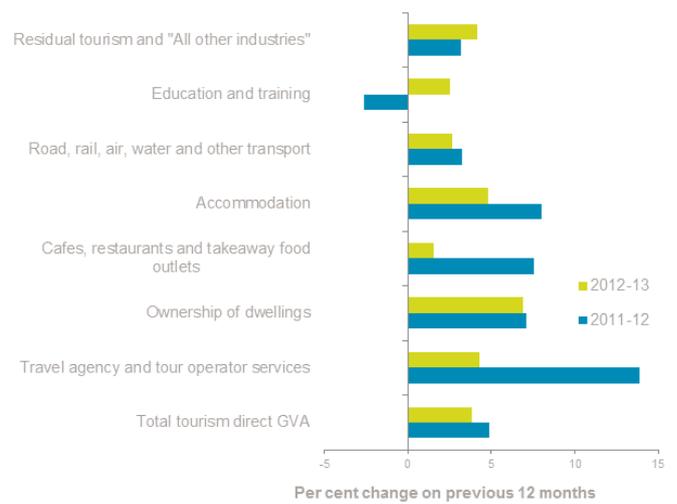


Figure 3: Trends in tourism industry employment

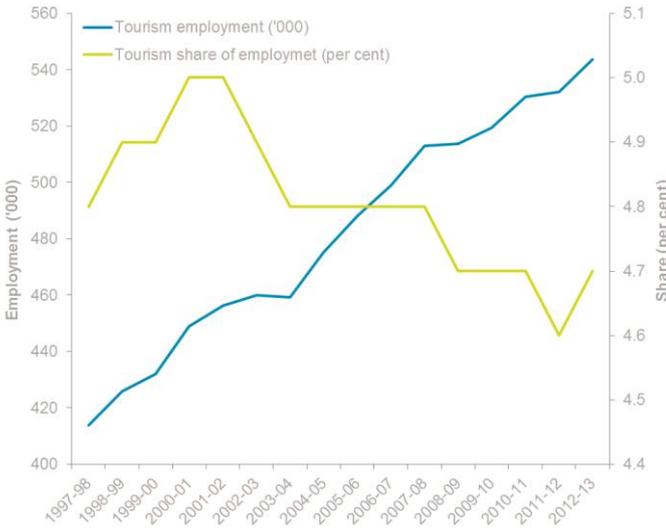


Figure 4: Change in tourism employment, by industry

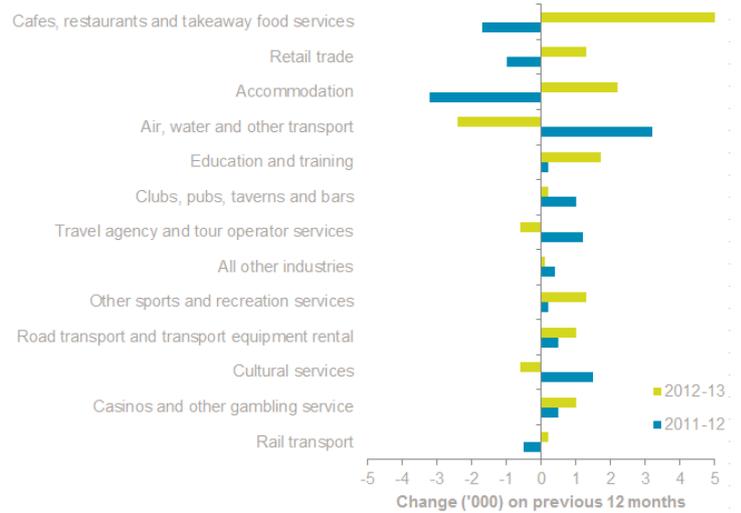


Figure 5: Change in tourism employment, status, gender and hours worked

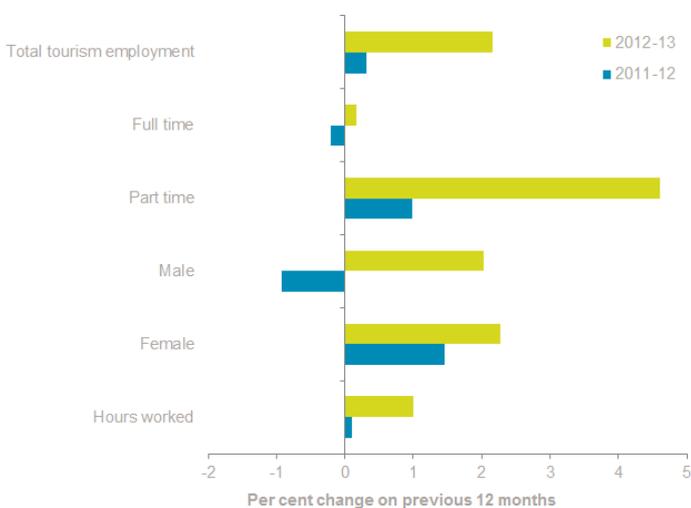
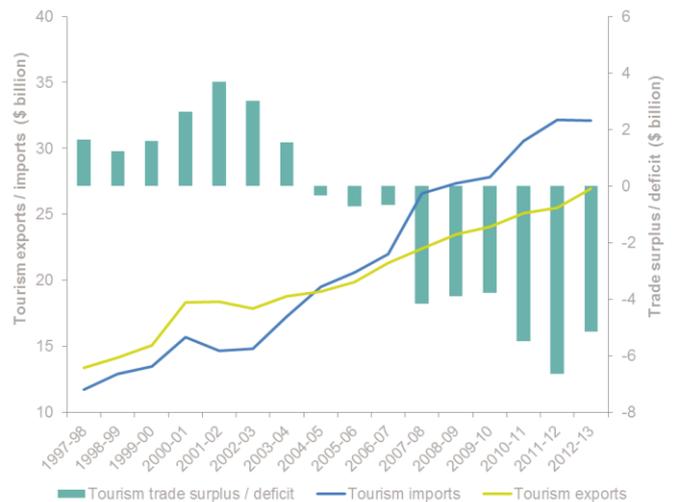


Figure 6: Tourism exports, imports and net trade



TOURISM EMPLOYMENT

In 2012–13, direct tourism employment increased 2.1 per cent (or 11,500 jobs) to 543,600. At the same time, total employment in Australia increased 1.2 per cent. This resulted in tourism's share of total employment increasing by 0.1 percentage points to 4.7 per cent (Figure 3).

TOURISM EMPLOYMENT BY INDUSTRY

For direct employment in the main tourism industries: *Accommodation* increased by 2,200 to 70,800; *Cafes, restaurants and takeaway food services* increased by 7,300 to 148,500; *Air, water and other transport* decreased by 2,400 to 35,300; *Retail trade* increased by 1,300 to 102,300; and jobs in *Education and training* increased by 1,700 to 38,300 (Figure 4). Over the period 2008–09 to 2012–13, direct tourism employment increased by 29,800 jobs (5.8 per cent, or an average annual growth rate of 1.4 per cent).

TOURISM EMPLOYMENT BY STATUS

In 2012–13, there were around 295,600 full-time jobs, up 0.2 per cent on the previous year. *Cafes, restaurants and takeaway food services, Retail trade* and *Accommodation* tourism industries employed nearly half of full-time employees in 2012–13. There were around 247,900 part-time jobs in tourism, up 4.6 per cent on the previous year (Figure 5).

TOURISM EMPLOYMENT BY GENDER

In 2012–13, more than half (53.8 per cent) of persons employed in tourism were female. The number of females working in tourism increased 2.3 per cent to 292,700. The number of males employed in tourism rose by 2.0 per cent to 250,900 (Figure 5).

TOURISM EMPLOYMENT BY HOURS WORKED

In 2012–13, the number of hours worked in the tourism industry was 1.0 per cent higher than in 2011–12 (compared to a 0.1 per cent increase between 2010–11 and 2011–12). Hours worked increased in 2012–13 at a slower rate than the number of persons employed in the industry. This is partly a reflection of the stronger increase in part-time employment, compared to full-time employment (Figure 5).

TOURISM CONSUMPTION AND TOURISM TRADE

(Internal) tourism consumption is equal to tourism expenditure made by all visitors, both resident and non-resident in Australia *plus* it includes adjustments for imputed consumption, such as for imputed rents on vacation homes. Internal tourism consumption estimates are different to TRA's estimates for tourist expenditure due to the imputations, the treatment of outbound expenditure within Australia or with Australian firms, and some other adjustments detailed in the explanatory notes of the TSA. In 2012–13, total tourism consumption in Australia increased 4.0 per cent to \$110.0 billion.

Domestic visitor consumption (including consumption made by Australian residents accrued to Australian firms before or after an outbound trip) increased 3.4 per cent (or by \$2.7 billion) to \$83.0 billion.

International visitor consumption (or tourism exports) increased 5.7 per cent to \$27.0 billion in 2012–13. Tourism exports also represent around 8.9 per cent share of total Australian exports. Tourism imports (or consumption made by Australians when travelling overseas) fell by 0.1 per cent to \$32.1 billion.

As a consequence, tourism trade was in deficit of \$5.2 billion in 2012–13. This follows a trade deficit of \$6.6 billion in 2011–12 (Figure 6).

TABLE 1: KEY TOURISM AGGREGATES, 2011–12 AND 2012–13

	2011–12	2012–13	Change	
			(per cent)	(unit)
Tourism gross value added (\$m)	37,354	38,783	3.8	1,429
Net taxes on tourism products (\$m)	3,384	3,472	2.6	88
Tourism gross domestic product (\$m)	40,738	42,255	3.7	1,517
Total consumption by tourists in Australia (\$m)	105,813	109,993	4.0	4,180
Consumption by domestic visitors in Australia (\$m)	80,302	83,031	3.4	2,729
Consumption by international visitors in Australia ¹ (\$m)	25,511	26,962	5.7	1,451
Consumption by Australian visitors while overseas ² (\$m)	32,157	32,122	-0.1	-35
Tourism balance of trade ³ (\$m)	-6,646	-5,160	n.a.	1,486
Persons employed in tourism	532,100	543,600	2.1	11,500
Full-time	295,100	295,600	0.2	500
Part-time	237,000	247,900	4.6	10,900
Male	245,900	250,900	2.0	5,000
Female	286,200	292,700	2.3	6,500
Tourism employment (hours worked index) (% change)	0.1	1.0	n.a.	n.a.
<i>Tourism share of gross value added (%)</i>	2.7	2.7	n.a.	0.0
<i>Tourism share of gross domestic product (%)</i>	2.7	2.8	n.a.	0.1
<i>Tourism share of total employment (%)</i>	4.6	4.7	n.a.	0.1

Source: Australian Bureau of Statistics (2013), *Tourism Satellite Account 2012–13* (ABS Cat. No. 5249.0)

Notes: (1) Consumption by international visitors in Australia is equivalent to the value of tourism exports; (2) Consumption by Australians while overseas is equivalent to the value of tourism imports; (3) Tourism balance of trade is equal to the value of tourism exports minus the value of tourism imports.

How to read this table: The table shows that in the period 2012–13, tourism gross domestic product (GDP) was \$42.3 billion, an increase of 3.7 per cent from 2011–12 (or a change of \$1.5 billion from 2011–12).

GLOSSARY OF TERMS²

DIRECT TOURISM GROSS DOMESTIC PRODUCT (GDP)

'Direct tourism GDP' is direct tourism gross value added plus net taxes on products that are attributable to the tourism industry. Direct tourism GDP will generally have a higher value than direct tourism value added. Direct tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While it is useful in this context, the *direct tourism gross value added* measure should be used when making comparisons with other industries or between countries.

DIRECT TOURISM GROSS VALUE ADDED (GVA)

The value of direct tourism output at basic prices, less the value of the inputs used in producing these tourism products. This measure is directly comparable with the value added of 'conventional' industries, such as mining and manufacturing, and should also be used for comparisons across countries.

TOURISM CONSUMPTION

Consists of tourism expenditure plus imputed consumption by domestic, inbound and outbound visitors on tourism-related products, including those sold at prices that are not economically significant.

- *Domestic tourism consumption* consists of the tourism consumption by domestic visitors on tourism-related products within Australia. It is the sum of household tourism consumption and business and government tourism consumption.
- *International tourism consumption* consists of the tourism consumption within Australia by inbound visitors on tourism-related products. Also referred to as internal tourism consumption by international visitors.
- *Outbound tourism consumption* consists of the tourism consumption by Australian outbound visitors outside of Australia while on an international trip. Also referred to as tourism imports.

TOURISM EXPENDITURE

Refers to the amount paid by a visitor or on behalf of a visitor during his/her trip and stay at the destination.

EMPLOYED PERSON

A person aged 15 years and 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; or
- Were employees who had a job but were not at work and were: away from work for less than four weeks up to the end of the reference week; or away from work for more than four weeks up to the end of the reference week and received pay for some or all of the four week period to the end of the reference week; or away from work as a standard work or shift arrangement; or on strike or locked out; or on workers' compensation and expected to return to their job; or
- Were employers or own account workers, who had a job, business or farm, but were not at work.

Full-time workers are those employed persons who usually worked 35 hours or more a week (in all jobs) and those who, although usually working fewer than 35 hours a week, worked 35 hours or more during the reference week.

² For a full glossary of terms used in compiling the Tourism Satellite Account, please see Australian Bureau of Statistics (2013), *Tourism Satellite Account 2012–13* (ABS Cat. No. 5249.0) available on the ABS website – www.abs.gov.au

Part-time workers are those employed persons who usually worked fewer than 35 hours a week (in all jobs), and either did so during the reference week, or were not at work during the reference week.