



Australian Government

Austrade



TOURISM
RESEARCH
AUSTRALIA

TOURISM SATELLITE ACCOUNT 2013–14

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 of gross value added per hour worked, as a proxy for labour productivity, and chain volume estimates of key aggregates. These estimates provide an indication of growth in the tourism industry in real terms. Please note all estimates used in the summary are in current prices, unless specified otherwise.

The Australian TSA is prepared by the Australian Bureau of Statistics and is funded by the Australian Trade Commission (AUSTRADE). The 2013–14 TSA was published on 17 December 2014 and is available at: www.abs.gov.au

TOURISM GROSS DOMESTIC PRODUCT (GDP)

In 2013–14, direct tourism GDP¹ increased 3.4 per cent (or \$1.4 billion) to \$43.4 billion. Over the same period, the Australian economy grew at a faster rate (up 4.1 per cent). Tourism's share of total GDP decreased marginally to 2.7 per cent (refer Figure 1).

Over the period 1997–98 to 2013–14, tourism's share of total GDP reached a peak of 3.5 per cent in 2000–01. Over the same period, direct tourism GDP increased \$24.9 billion (or by 134.9 per cent).

DOMESTIC AND INTERNATIONAL TOURISM

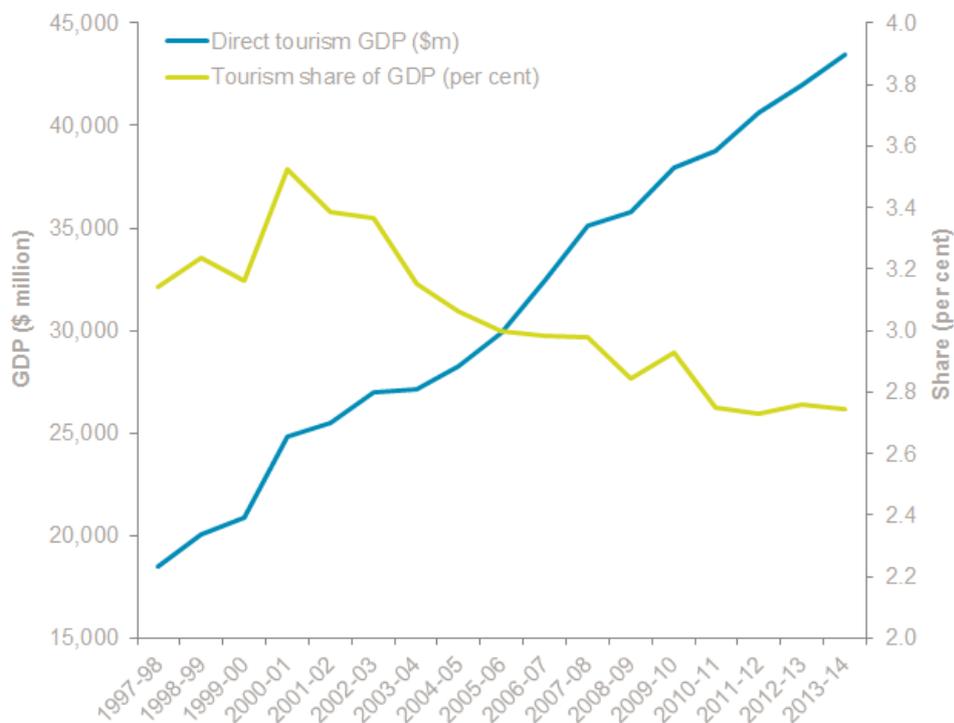
In 2013–14:

- domestic tourism GDP increased 3.5 per cent (or \$1.1 billion) to \$32.0 billion, with
- domestic tourism responsible for 73.7 per cent of total direct tourism GDP
- international tourism GDP increased 3.1 per cent (or \$0.3 billion) to \$11.4 billion, with
- international tourism responsible for 26.3 per cent of total direct tourism GDP.

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, 1997–98 to 2012–13* (see www.tra.gov.au).

In chain volume measures (real terms), direct tourism GDP decreased by 0.4 per cent, compared with real GDP growth of 2.5 per cent. Tourism GDP implicit price deflator² rose by 3.8 per cent, well above the national average of 1.5 per cent.

Figure 1: Growth in tourism industry Gross Domestic Product



TOURISM GROSS VALUE ADDED (GVA)

In 2013–14, direct tourism GVA increased 3.4 per cent (or \$1.3 billion) to \$39.9 billion. The main tourism industries had the following increases for Direct GVA:

- *Accommodation* increased 1.5 per cent to \$7.0 billion
- *Cafes, restaurants and takeaway food outlets* increased 5.7 per cent to \$4.4 billion
- *Air, water and other transport* increased 3.5 per cent to \$5.8 billion
- *Other retail trade* increased 3.5 per cent to \$5.3 billion
- *Education and training* increased 7.8 per cent to \$2.7 billion (refer Figure 2).

² This reflects broad price pressures faced across the tourism "sector" by both tourism industries and visitors.

Figure 2: Growth in tourism value added, selected industries

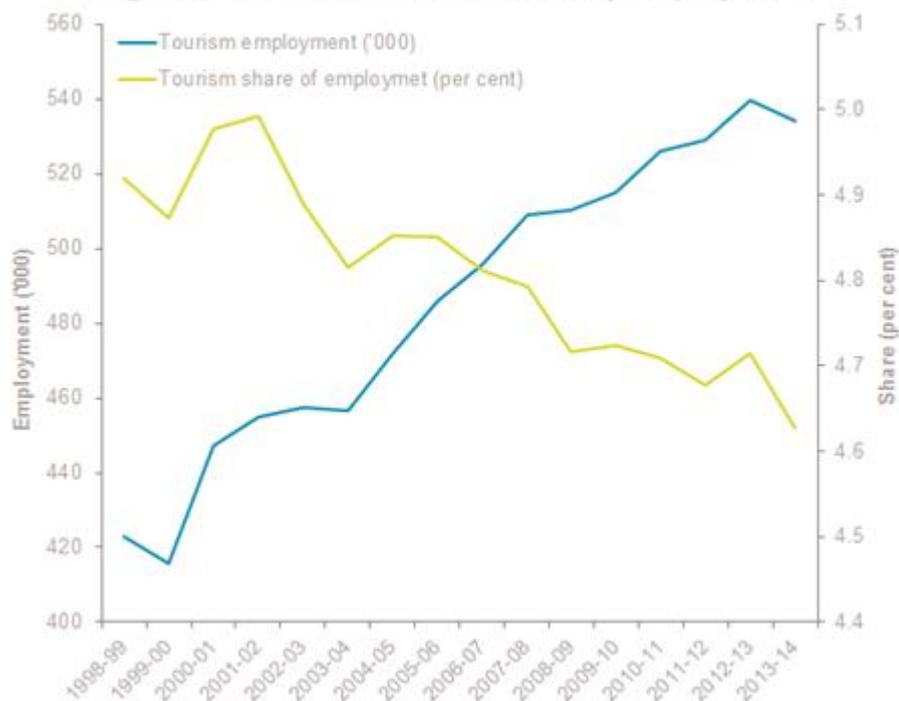


KEY TOURISM AGGREGATES

TOURISM EMPLOYMENT

In 2013–14, direct tourism employment decreased 1.0 per cent (or 5,600 jobs) to 534,000. At the same time, total employment in Australia increased 0.8 per cent. This resulted in tourism's share of total employment decreasing to 4.6 per cent (Figure 3).

Figure 3: Trends in tourism industry employment

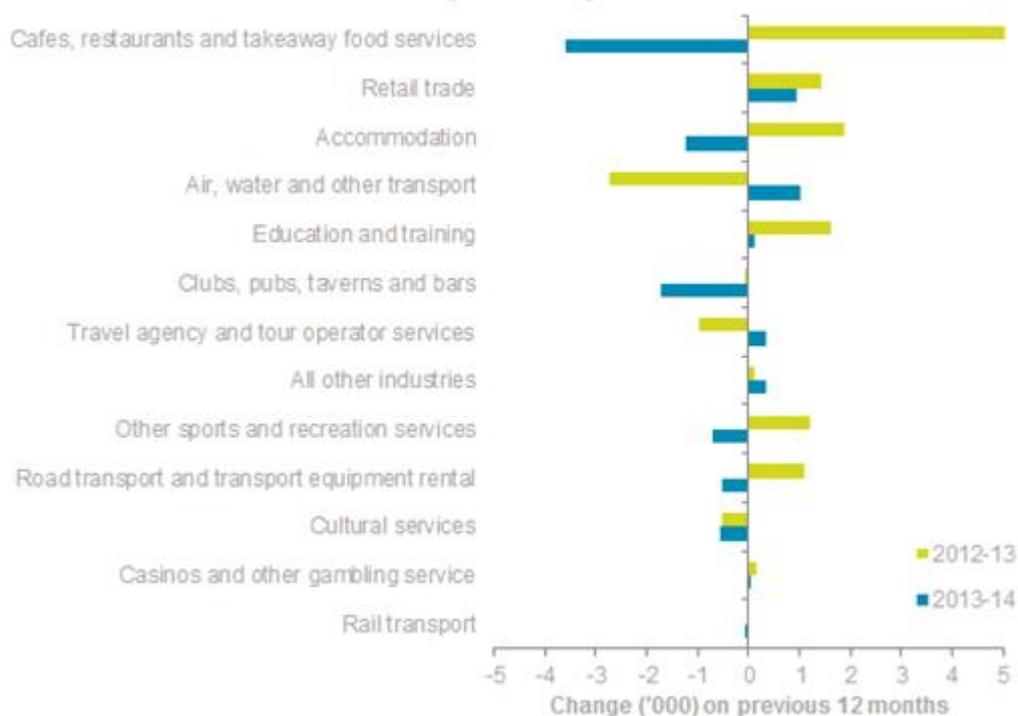


TOURISM EMPLOYMENT BY INDUSTRY

For direct employment in the main tourism industries:

- *Accommodation* decreased by 1200 to 69,700
- *Cafes, restaurants and takeaway food services* decreased by 3600 to 144,300 *Air, water and other transport* increased by 1,000 to 36,200
- *Retail trade* increased by 1,000 to 101,500
- *Education and training* increased by 200 to 37,800 (Figure 4).

Figure 4: Change in tourism employment, by industry



TOURISM EMPLOYMENT BY STATUS

In 2013-14, there were around 290,300 full-time jobs, with the *Cafes, restaurants and takeaway food services*, *Retail trade* and *Accommodation* industries employing half (50.3%) of tourism full-time employees. There were around 243,700 part-time jobs in tourism; down 0.8 per cent on the previous year (Figure 5).

TOURISM EMPLOYMENT BY GENDER

In 2013-14, more than half (53.6 per cent) of persons employed in tourism were female. The number of females working in tourism decreased 1.4 per cent to 286,200. The number of males employed in tourism declined by 0.6 per cent in 2013-14 to 247,800 (Figure 5).

TOURISM EMPLOYMENT BY HOURS WORKED

In 2013-14, tourism hours worked were 0.40 per cent lower than in 2012-13. This decrease was smaller than the decrease (1.0 per cent) in number of persons employed in the industry in 2013-14. (Figure 5).

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



TOURISM CONSUMPTION AND TOURISM TRADE

In 2013–14, total tourism consumption in Australia increased 3.7% per cent (or \$4.0 billion) to \$113.3 billion.

Domestic visitor consumption (including consumption made by Australian residents accrued to Australian firms before or after an outbound trip) increased 3.5 per cent (or by \$2.9 billion) to \$86.2 billion.

International visitor consumption (or tourism exports) increased 4.1 per cent to \$27.2 billion in 2013–14. Tourism exports also represented around an 8.2 per cent share of total Australian exports. Tourism imports (or consumption by Australians when travelling overseas) increased by 3.6 per cent to \$34.9 billion.

As a consequence, tourism trade was in deficit by \$7.7 billion in 2013–14, compared to \$7.6 billion in 2012–13 (Figure 6).

NOTE: 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.



TABLE 1: KEY TOURISM AGGREGATES, 2012–13 AND 2013–14

	2012–13	2013–14	Change (per cent)	(unit)
Tourism gross value added (\$m)	38596	39900	3.4	1304
Net taxes on tourism products (\$m)	3409	3544	3.9	135
Tourism gross domestic product (\$m)	42005	43443	3.4	1438
Total consumption by tourists in Australia (\$m)	109341	113343	3.7	4002
Consumption by domestic visitors in Australia (\$m)	83239	86168	3.5	2929
Consumption by international visitors in Australia ¹	26101	27176	4.1	1075
Consumption by Australian visitors while overseas ² (\$m)	33671	34871	3.6	1200
Tourism balance of trade ³ (\$m)	7570	7695	n.a.	125
Persons employed in tourism ('000)	539600	534000	-1.0	-5600
Full Time	294	290	-1.4	-4
Part Time	246	244	-0.8	-2
Male	249	248	-0.4	-1
Female	290	286	-1.4	-4
Tourism employment (hours worked index) (% change)	0.7	-0.4	n.a.	n.a.
<i>Tourism share of gross value added (%)</i>	2.7	2.7	n.a.	0
<i>Tourism share of gross domestic product (%)</i>	2.8	2.7	n.a.	-0.1
<i>Tourism share of total employment (%)</i>	4.7	4.6	n.a.	-0.1

Source: Australian Bureau of Statistics (2014), *Tourism Satellite Account 2013–14* (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) 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 2013–14, tourism gross domestic product (GDP) was \$43.4 billion; an increase of 3.4 per cent from 2012–13 (or a change of \$1.4 billion from 2012–13).

In real terms, internal tourism consumption decreased marginally by 0.2 per cent. Of this figure, domestic tourism fell 0.4 per cent, while international tourism grew marginally by 0.2 per cent.

GLOSSARY OF TERMS³

DIRECT TOURISM GROSS DOMESTIC PRODUCT (GDP)

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 for and 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
- Was an employee who had a job but was not at work and was: 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

³ For a full glossary of terms used in compiling the Tourism Satellite Account, please see Australian Bureau of Statistics (2014), *Tourism Satellite Account 2013–14* (ABS Cat. No. 5249.0) available on the ABS website – www.abs.gov.au

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

- Was an employer or own account worker, who had a job, business or farm, but was 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.

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.