TOURISM within Communities

THE FLOW OF VISITOR EXPENDITURE THROUGH ECONOMIES AND INDUSTRIES
Tourism within Communities: the flow of visitor expenditure through economies and industries

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Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government’s Cooperative Research Centres Program. STCRC is Australia’s largest dedicated tourism research organisation, with over $187 million invested in tourism research programs, commercialisation and education since 1997. The aim of STCRC research is to underpin the development of a dynamic, internationally competitive and sustainable tourism industry. STCRC is a not-for-profit company owned by its industry, government and university partners.

STCRC falls under the Commonwealth CRC program, which aims to turn Australia’s research and innovations into successful new products, services and technologies, making our industries more efficient, productive and competitive.

The program emphasises the importance of collaboration between business and researchers to maximise the benefits of research through an enhanced process of utilisation, commercialisation and technology transfer.

STCRC’s objectives are to enhance:

• the contribution of long-term scientific and technological research and innovation to Australia’s sustainable economic and social development
• the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia
• the value of graduate researchers to Australia
• collaboration among researchers, between researchers and industry or other users
• efficiency in the use of intellectual and other research outcomes.

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The Role of Tourism in Australia

Tourism plays a vital role in the life and economy of every region in Australia and is a significant contributor to the economy through employment, foreign exchange earnings and investment in businesses, communities and regional development.

Directly and indirectly, tourism contributes $68 billion to the Australian economy, employs more than 848,000 Australians and is made up of more than 585,000 tourism related businesses.¹

Tourism also drives regional and community development through investment in infrastructure, the preservation of natural and cultural resources and encouraging social development and understanding among communities.

The diverse nature of tourism

The term ‘tourism’ is not restricted to leisure activities. It also includes travel to a destination for reasons other than holidays including for business, visiting friends and relatives, sport and education. Tourism is further defined by the nature of the customer demand. For example, when a visitor goes to a restaurant, that restaurant becomes part of the ‘tourism’ industry. Tourism is therefore an activity that contributes to many traditional industries via products and services purchased by tourists.

In addition, there are a wide range of businesses which rely on and support the direct service providers, for example, agriculture, furniture suppliers, lawyers, laundries and printing companies. These businesses are indirect contributors to the tourism sector, that is, they are industries that provide resources to businesses that are in direct contact with visitors.

Tourism therefore plays multiple roles for any Australian destination as:
• an economic driver through job creation and revenue generation
• a contributor to regional and community development through investment in infrastructure and preservation of natural or cultural resources
• a contributor to social development and understanding among communities and people. This is particularly relevant in regional and rural Australia, with 23% of international visitors and 70% of holidaying Australians spending their holiday nights in these regions.

Tourism—a multi-layered sector

The broad diversity of tourism service providers are represented by a wide variety of industry associations and organisations. These range from state and territory representative bodies such as State Tourism Industry Councils (STICs) to sector organisations such as the Australian Federation of Travel Agents (AFTA) and the Hotel Motel and Accommodation Association of Australia (HMAA).

All levels of government also have both direct and indirect involvement in tourism. These include the national, state, regional and local tourism organisations and a broad cross-section of government departments involved in policy and supply-side issues such as infrastructure and land use planning.

The diversity of the industry is further highlighted by the fact that 90% of tourism operators in Australia are small- to medium-sized businesses (SMEs) employing fewer than 20 staff, with many of them having little in common other than providing services to visitors.

Measuring tourism’s value

Governments at all levels recognise that tourism benefits flow not just as revenue to industry and government, but to the community overall. This makes it even more important that the linkages between supply (planning, access, infrastructure and product development) and demand (consumer trends and promotion) are understood, and adequately recorded.

The challenge in measuring the value of tourism in the past has been that tourism is not an ‘industry’ in the traditional sense, in that the products and services visitors enjoy are derived from a number of industries. For example, if a visitor takes a bus trip, that journey is measured within Australia’s National Accounts as contributing to the transport industry.

In other words the value of tourism has largely been ‘invisible’ as it contributes to the sum of a number of industries and is not a recognised industry category in its own right. Policymakers and investors in tourism have been hampered by a lack of consistent or detailed data measuring the value of the tourism sector and its precise place in the economy.

¹ Tourism Research Australia – Tourism Businesses in Australia June 2004 to June 2007
Tourism Satellite Accounts in Australia

In October 2000, the Australian Bureau of Statistics (ABS) released the first Tourism Satellite Account (TSA) for Australia. Using data from the 1996–97 National Accounts, the ABS extracted the tourism component from each of the industry sectors and totalled these to provide a measurement of tourism’s contribution to the Australian economy.

These accounts, which are updated annually, provide government agencies, tourism representative bodies and tourism businesses in Australia with data to inform their planning and funding. The national TSAs have provided a more solid base for industry to work with government to enhance effective industry policies.

They provide a number of measures on the contribution of tourism nationally including:

- the economic contribution of tourism
- employment derived from tourism
- how visitors spend their money
- other industries that supply products or services to tourism
- the employment from those support industries.

STCRC develops first Tourism Satellite Accounts for individual Australian states and territories

In late 2008, Sustainable Tourism Cooperative Research Centre (STCRC), through its Centre for Economics and Policy (CEP), and in partnership with the Australian states and territories, developed the very first suite of state and territory specific TSAs (refer Table 1). These TSAs adopt internationally agreed TSA methodology and definitions and have been reconciled against the national tourism satellite account. As with the national TSAs, STCRC’s tourism satellite accounts extract data from all recognised industry sectors to provide a direct measurement of tourism’s contribution to the state and territory economies. Direct contributions are generated where there is a direct physical or economic relationship between the visitor and the producer of the goods and services, such as hotels and airlines, or when a visitor eats at a restaurant or catches a taxi.

In addition these state and territory TSAs also provide estimates on the indirect contribution of tourism. Indirect contributions arise from other industries not in direct contact with visitors but who produce services and products for the industries which have direct visitor contact. For example, a visitor takes a fully catered guided day tour, the meals provided are supplied by a catering company, the catering company purchases the raw ingredients from a food distribution company, that business sources its vegetables from a farm.

This represents a series of indirect processes that link tourism to other economy sectors.

The aggregation of direct and indirect effects is useful in understanding the wider flow-on effects of tourism to both the economy and employment.

Who can use STCRC’s Tourism Satellite Accounts?

STCRC’s tourism satellite accounts offer a range of benefits to the three tiers of government and their relevant departments, tourism industry representative bodies and tourism operators.

They provide valuable data to help inform policy and planning in areas including:

- infrastructure development
- education and training
- investment
- marketing
- forecasting and modelling.

STCRC’s TSAs also provide a means for each of the states and territories to make comparisons between tourism and other industries and economic activities and to measure the contribution of tourism to the economy over time. This can assist in allocating tourism expenditure across a broad cross-section of tourism related areas such as transport, water infrastructure, hotel investment and built and natural attractions.
Tourism GVA and Tourism GSP

Tourism gross value added (GVA) measures the value of tourism goods and services minus the costs of the goods and services required to produce these tourism products.

Tourism gross domestic product (GDP) represents the value added of tourism goods and services (tourism GVA), plus relevant taxes paid less the Government subsidies received to produce these products.

Tourism gross state product (GSP) is tourism GDP measured for the state or territory rather than at the national level. The tourism GDP and tourism GSP measures enable direct comparison with the most widely recognised national accounting aggregate for an economy which is GDP (or GSP for a state or territory).

Table 1: Estimates of direct, indirect and total contribution of tourism by state and territory, 2006–07

<table>
<thead>
<tr>
<th>Direct contribution</th>
<th>NSW</th>
<th>VIC</th>
<th>QLD</th>
<th>SA</th>
<th>WA</th>
<th>TAS</th>
<th>NT</th>
<th>ACT</th>
<th>AUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism GVA ($m)</td>
<td>11279.75</td>
<td>6905.29</td>
<td>7127.92</td>
<td>1842.97</td>
<td>2972.66</td>
<td>835.86</td>
<td>775.78</td>
<td>565.79</td>
<td>32306.02</td>
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<td>Tourism net taxes on products ($m)</td>
<td>2057.37</td>
<td>1343.98</td>
<td>1657.27</td>
<td>412.52</td>
<td>682.06</td>
<td>188.43</td>
<td>158.14</td>
<td>130.26</td>
<td>6630.05</td>
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<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>13337.13</td>
<td>8249.28</td>
<td>8785.19</td>
<td>2255.49</td>
<td>3554.72</td>
<td>1024.29</td>
<td>933.92</td>
<td>696.05</td>
<td>38936.06</td>
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<tr>
<td>Tourism employment (1000)</td>
<td>157.80</td>
<td>102.18</td>
<td>118.90</td>
<td>27.70</td>
<td>45.66</td>
<td>13.70</td>
<td>9.68</td>
<td>7.28</td>
<td>482.90</td>
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<tr>
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<td>230645.30</td>
<td>181638.56</td>
<td>62052.05</td>
<td>127784.47</td>
<td>18640.47</td>
<td>13369.55</td>
<td>20170.13</td>
<td>961880.26</td>
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<tr>
<td>Tourism share of GVA (%)</td>
<td>3.67</td>
<td>2.99</td>
<td>3.92</td>
<td>2.94</td>
<td>2.33</td>
<td>4.48</td>
<td>5.80</td>
<td>2.81</td>
<td>3.36</td>
</tr>
<tr>
<td>GSP, GDP ($m)</td>
<td>335144.00</td>
<td>247440.00</td>
<td>195704.00</td>
<td>69540.00</td>
<td>141368.00</td>
<td>21088.00</td>
<td>14494.00</td>
<td>21586.00</td>
<td>1046364.00</td>
</tr>
<tr>
<td>Tourism share of GSP, GDP (%)</td>
<td>3.98</td>
<td>3.33</td>
<td>4.49</td>
<td>3.24</td>
<td>2.59</td>
<td>4.66</td>
<td>5.86</td>
<td>3.22</td>
<td>3.72</td>
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<tr>
<td>Employment (1000)</td>
<td>3307.22</td>
<td>2548.89</td>
<td>2091.72</td>
<td>755.43</td>
<td>1085.53</td>
<td>223.16</td>
<td>102.46</td>
<td>188.01</td>
<td>10302.42</td>
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<tr>
<td>Tourism share of employment (%)</td>
<td>4.77</td>
<td>4.01</td>
<td>5.68</td>
<td>3.67</td>
<td>4.21</td>
<td>6.14</td>
<td>9.45</td>
<td>3.87</td>
<td>4.69</td>
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<th>SA</th>
<th>WA</th>
<th>TAS</th>
<th>NT</th>
<th>ACT</th>
<th>AUS</th>
</tr>
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<tbody>
<tr>
<td>Tourism GVA ($m)</td>
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<td>6523.68</td>
<td>5695.03</td>
<td>1885.30</td>
<td>3187.49</td>
<td>701.99</td>
<td>703.20</td>
<td>495.73</td>
<td>29738.82</td>
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<tr>
<td>Tourism net taxes on products ($m)</td>
<td>470.34</td>
<td>349.66</td>
<td>404.28</td>
<td>106.70</td>
<td>168.35</td>
<td>45.46</td>
<td>33.30</td>
<td>1633.19</td>
<td></td>
</tr>
<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>9216.75</td>
<td>6873.34</td>
<td>6099.32</td>
<td>1992.00</td>
<td>3355.83</td>
<td>757.09</td>
<td>748.66</td>
<td>529.03</td>
<td>29572.01</td>
</tr>
<tr>
<td>Tourism employment (1000)</td>
<td>109.65</td>
<td>77.07</td>
<td>97.00</td>
<td>23.79</td>
<td>34.32</td>
<td>11.59</td>
<td>7.32</td>
<td>5.61</td>
<td>365.89</td>
</tr>
<tr>
<td>Total contribution</td>
<td>NSW</td>
<td>VIC</td>
<td>QLD</td>
<td>SA</td>
<td>WA</td>
<td>TAS</td>
<td>NT</td>
<td>ACT</td>
<td>AUS</td>
</tr>
<tr>
<td>Tourism GVA ($m)</td>
<td>20026.16</td>
<td>13428.98</td>
<td>12822.96</td>
<td>3728.27</td>
<td>6160.13</td>
<td>1537.84</td>
<td>1478.98</td>
<td>1061.52</td>
<td>60244.83</td>
</tr>
<tr>
<td>Tourism net taxes on products ($m)</td>
<td>2527.71</td>
<td>1939.64</td>
<td>2061.56</td>
<td>519.22</td>
<td>850.42</td>
<td>243.53</td>
<td>203.60</td>
<td>163.56</td>
<td>8263.24</td>
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<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>22553.87</td>
<td>15122.61</td>
<td>14884.51</td>
<td>4247.49</td>
<td>7015.55</td>
<td>1781.37</td>
<td>1682.58</td>
<td>1225.08</td>
<td>68508.07</td>
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<tr>
<td>Tourism employment (1000)</td>
<td>267.45</td>
<td>179.25</td>
<td>215.90</td>
<td>51.49</td>
<td>79.98</td>
<td>24.84</td>
<td>17.00</td>
<td>12.89</td>
<td>848.79</td>
</tr>
<tr>
<td>Ratio of total to direct</td>
<td>NSW</td>
<td>VIC</td>
<td>QLD</td>
<td>SA</td>
<td>WA</td>
<td>TAS</td>
<td>NT</td>
<td>ACT</td>
<td>AUS</td>
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<tr>
<td>Tourism GVA ($m)</td>
<td>1.78</td>
<td>1.94</td>
<td>1.80</td>
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<td>1.84</td>
<td>1.91</td>
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<tr>
<td>Tourism net taxes on products</td>
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<td>1.26</td>
<td>1.24</td>
<td>1.26</td>
<td>1.25</td>
<td>1.29</td>
<td>1.29</td>
<td>1.26</td>
<td>1.25</td>
</tr>
<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>1.69</td>
<td>1.83</td>
<td>1.69</td>
<td>1.88</td>
<td>1.92</td>
<td>1.74</td>
<td>1.80</td>
<td>1.76</td>
<td>1.76</td>
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<td>Tourism employment (1000)</td>
<td>1.69</td>
<td>1.75</td>
<td>1.82</td>
<td>1.86</td>
<td>1.75</td>
<td>1.81</td>
<td>1.76</td>
<td>1.77</td>
<td>1.76</td>
</tr>
<tr>
<td>Share of indirect in total contribution</td>
<td>NSW</td>
<td>VIC</td>
<td>QLD</td>
<td>SA</td>
<td>WA</td>
<td>TAS</td>
<td>NT</td>
<td>ACT</td>
<td>AUS</td>
</tr>
<tr>
<td>Tourism GVA ($m)</td>
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<td>48.58</td>
<td>44.41</td>
<td>50.57</td>
<td>51.74</td>
<td>45.65</td>
<td>47.55</td>
<td>46.70</td>
<td>46.38</td>
</tr>
<tr>
<td>Tourism net taxes on products</td>
<td>18.61</td>
<td>20.65</td>
<td>19.61</td>
<td>20.55</td>
<td>19.80</td>
<td>22.63</td>
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<td>19.76</td>
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<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>40.87</td>
<td>45.45</td>
<td>40.98</td>
<td>46.90</td>
<td>47.87</td>
<td>42.50</td>
<td>44.49</td>
<td>43.18</td>
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<td>Tourism employment (1000)</td>
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<td>43.00</td>
<td>44.93</td>
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<td>42.91</td>
<td>44.87</td>
<td>43.04</td>
<td>43.52</td>
<td>43.11</td>
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</table>
Interstate trade effects

STCRC’s TSAs also measure interstate trade effects. A good example of this is aviation transport where consumers may pay for their ticket in one state but the actual flight operates between cities in other states.

This also applies with manufactured goods that are made in one state but used in another, such as wine and beverages, equipment and furnishings.

Total consumption

Tourism consumption is the total consumption by all visitors, or made on behalf of a visitor, for and during his or her trip. Tourism consumption also includes expenditure before and after the trip provided that they are related to the trip, for example, the purchase of luggage or film processing. Refer to Table 2 and Figure 1.

Table 2: Tourism consumption by state and territory, 2006–07, $m

<table>
<thead>
<tr>
<th>Tourism Products</th>
<th>NSW</th>
<th>VIC</th>
<th>QLD</th>
<th>SA</th>
<th>WA</th>
<th>TAS</th>
<th>NT</th>
<th>ACT</th>
<th>AUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel agency and tour operator services</td>
<td>599</td>
<td>373</td>
<td>780</td>
<td>148</td>
<td>210</td>
<td>161</td>
<td>108</td>
<td>70</td>
<td>2450</td>
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<tr>
<td>Taxi fares</td>
<td>284</td>
<td>203</td>
<td>206</td>
<td>37</td>
<td>62</td>
<td>16</td>
<td>19</td>
<td>29</td>
<td>855</td>
</tr>
<tr>
<td>Long distance passenger transportation</td>
<td>4282</td>
<td>2567</td>
<td>3312</td>
<td>607</td>
<td>1477</td>
<td>375</td>
<td>501</td>
<td>252</td>
<td>13371</td>
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<tr>
<td>Motor vehicle hire and lease</td>
<td>315</td>
<td>191</td>
<td>500</td>
<td>72</td>
<td>223</td>
<td>95</td>
<td>116</td>
<td>27</td>
<td>1539</td>
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<tr>
<td>Accommodation services</td>
<td>3058</td>
<td>1564</td>
<td>2493</td>
<td>434</td>
<td>894</td>
<td>229</td>
<td>251</td>
<td>190</td>
<td>9213</td>
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<tr>
<td>Takeaway and restaurant meals</td>
<td>4099</td>
<td>2464</td>
<td>3215</td>
<td>712</td>
<td>1122</td>
<td>349</td>
<td>256</td>
<td>275</td>
<td>12401</td>
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<tr>
<td>Shopping (including gifts and souvenirs)</td>
<td>3750</td>
<td>2519</td>
<td>3290</td>
<td>671</td>
<td>1122</td>
<td>322</td>
<td>186</td>
<td>178</td>
<td>12038</td>
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<tr>
<td>Local area passenger transportation</td>
<td>251</td>
<td>134</td>
<td>128</td>
<td>20</td>
<td>42</td>
<td>14</td>
<td>14</td>
<td>7</td>
<td>609</td>
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<tr>
<td>Repair and maintenance of motor vehicles</td>
<td>165</td>
<td>95</td>
<td>124</td>
<td>31</td>
<td>68</td>
<td>13</td>
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<td>Fuel (petrol, diesel)</td>
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<td>1402</td>
<td>431</td>
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<td>157</td>
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<td>Food products</td>
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<td>1324</td>
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<td>438</td>
<td>759</td>
<td>210</td>
<td>176</td>
<td>89</td>
<td>7148</td>
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<tr>
<td>Alcoholic beverages and other beverages</td>
<td>1499</td>
<td>902</td>
<td>1169</td>
<td>310</td>
<td>1122</td>
<td>322</td>
<td>186</td>
<td>178</td>
<td>12038</td>
</tr>
<tr>
<td>Motor vehicles, caravans, boats, etc.</td>
<td>420</td>
<td>208</td>
<td>295</td>
<td>82</td>
<td>197</td>
<td>32</td>
<td>41</td>
<td>26</td>
<td>1301</td>
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<td>Recreational, cultural and sports services</td>
<td>791</td>
<td>556</td>
<td>851</td>
<td>131</td>
<td>202</td>
<td>66</td>
<td>52</td>
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<td>Gambling and betting services</td>
<td>310</td>
<td>285</td>
<td>279</td>
<td>57</td>
<td>103</td>
<td>42</td>
<td>38</td>
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<td>1149</td>
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<td>Education</td>
<td>1048</td>
<td>840</td>
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<td>309</td>
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<td>Actual and imputed rent on holiday houses</td>
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<td>638</td>
<td>456</td>
<td>202</td>
<td>215</td>
<td>55</td>
<td>22</td>
<td>48</td>
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<td>Other tourism goods and services</td>
<td>963</td>
<td>648</td>
<td>652</td>
<td>179</td>
<td>317</td>
<td>56</td>
<td>86</td>
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<td>21082</td>
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<td>8487</td>
<td>2397</td>
<td>2173</td>
<td>1577</td>
<td>84762</td>
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Figure 1: Tourism consumption by state and territory, 2006–07, $m

Tourism consumption, 2006–07 $m
Tourism within Communities
THE FLOW OF VISITOR EXPENDITURE THROUGH ECONOMIES AND INDUSTRIES

State TSAs

New South Wales 2006–07

Direct contribution to gross state product
Tourism’s direct contribution to New South Wales’s gross state product (GSP) was $13.3 billion:
• This was 4.0% of total GSP generated by all industries in New South Wales.
• This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Direct contribution to gross value added
Tourism contributed $11.3 billion to New South Wales’s gross value added (GVA):
• This was 3.7% of total GVA generated by all industries in New South Wales.
• Australian tourism’s overall contribution to the national GVA is 3.4%.
• New South Wales’s share of tourism GVA in Australia is 34.9%.
• This compares with New South Wales’s contribution to GVA for all Australian industries of 31.9%.

Tourism GVA included $1.8 billion from interstate trade effects that arise from the production of goods and services in New South Wales, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in New South Wales (refer figure 2) was generated in a wide range of industries including:
• air and water transport 19.9%
• accommodation 13.5%
• other retail trade 9.9%
• cafés, restaurants and food outlets 9.1%

Direct contribution to employment
Tourism was directly responsible for generating 157,802 jobs in New South Wales.
• This represents 4.8% of all jobs in the state.
• It compares to tourism’s share of overall employment in Australia of 4.7%.
• New South Wales contributes 32.7% of all tourism jobs in Australia.
• This compares with New South Wales’ share of all Australian jobs of 32.1%.

Indirect contribution of tourism
Tourism’s indirect economic contribution to the New South Wales economy in 2006–07 was:
• $8.8 billion of industry GVA
• $9.2 billion of GSP
• 109,645 jobs

Tourism’s total contribution to New South Wales economy
The total of direct plus indirect tourism contribution generated by tourism and non-tourism industries in the New South Wales economy was:
• $20.0 billion in GVA
• $22.6 billion in GSP
• 267,448 jobs
Tourism consumption

Tourism employment in New South Wales included 14,675 employees who are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors

Tourism employment was spread across a wide range of sectors of the New South Wales economy:
- retail trade 24.2%
- accommodation 14.5%
- air and water transport 11%
- cafés, restaurants and food outlets 10.1%
- education 7.6%
- manufacturing 6.4%

Net taxes

Net taxes on products arising from tourism consumption in New South Wales raised $2.1 billion in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report State and Federal Taxes on Tourism in Australia: estimates for 2003–04.

Major sources of tax revenues were:
- fuel $687 million
- shopping $320 million
- alcohol $311 million
- takeaway and restaurant meals $270 million
- accommodation services $143 million
- gambling $93 million

Net taxes on long distance and on local area passenger transportation were -$23.4 million and -$78.9 million respectively because of government subsidies.
TOURISM within Communities
THE FLOW OF VISITOR EXPENDITURE THROUGH ECONOMIES AND INDUSTRIES

Table 3: Direct and indirect contribution of tourism, NSW and AUS, 2006–07

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<thead>
<tr>
<th></th>
<th>NSW</th>
<th>AUS</th>
<th>Share (%)</th>
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<td>Tourism GVA ($m)</td>
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<td>Tourism GSP, GDP ($m)</td>
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<td>Tourism share of GSP, GDP (%)</td>
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<td>Employment ('000)</td>
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<td>Tourism share of employment (%)</td>
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<td><strong>Indirect contribution</strong></td>
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<td>Tourism employment ('000)</td>
<td>267.448</td>
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Victoria 2006–07

Direct contribution to gross state product
Tourism’s direct contribution to Victoria’s gross state product (GSP) in 2006–07 was $8.2 billion:
• This was 3.3% of total GSP generated by all industries in Victoria.
• It compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Direct contribution to gross value added
Tourism contributed $6.9 billion to Victoria’s gross value added (GVA):
• This was 3% of total GVA generated by all industries in Victoria.
• Australian tourism’s overall contribution to the national GVA is 3.4%.
• Victoria’s share of tourism GVA in Australia is 21.4%.
• This compares with Victoria’s share in GVA for all Australian industries of 24%.

Tourism GVA included $875.5 million from interstate trade effects that arise from the production of goods and services in Victoria, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in Victoria (refer figure 3) was generated in a wide range of industries including:
• accommodation 11.9%
• other retail trade 10.7%
• air and water transport 9.8%
• cafés, restaurants and food outlets 9%

Direct contribution to employment
Tourism was directly responsible for generating 102,179 jobs in the Victorian economy:
• This represents 4% of all jobs in Victoria.
• It compares to tourism’s share of total employment in Australia of 4.7%.
• Victoria contributes 21.2% of all tourism jobs in Australia
• This compares with Victoria’s share of all Australian jobs of 24.7%.

Indirect contribution of tourism
Tourism’s indirect economic contribution to the Victorian economy in 2006–07 was:
• $6.5 billion of industry GVA
• $6.9 billion of GSP
• 77,069 jobs

Tourism total contribution to the Victorian economy
The total of direct plus indirect tourism contribution generated by tourism and non-tourism industries in the Victoria economy was:
• $13.4 billion in GVA
• $15.1 billion in GSP
• 179,247 jobs
TOURISM within Communities
THE FLOW OF VISITOR EXPENDITURE THROUGH ECONOMIES AND INDUSTRIES

Figure 3: Share of tourism industry GVA by industry sector, VIC, 2006-07

Tourism consumption
Tourism employment in Victoria included 7,978 employees who are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors
Tourism employment was spread across a wide range of sectors of the Victorian economy:
- retail trade 23.8%
- accommodation 13%
- cafés, restaurants and food outlets 10.2%
- education 8.8%
- manufacturing 8.4%
- road transport and motor vehicle hiring 5.3%
- air and water transport 5.2%

Net taxes
Net taxes on products arising from tourism consumption in Victoria raised $1.3 billion in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report State and Federal Taxes on Tourism in Australia: estimates for 2003–04.

Major sources of tax revenues were:
- fuel $438 million
- shopping $215 million
- alcohol $199 million
- takeaway and restaurant meals $166 million
- gambling $86 million
- accommodation services $78 million

Net taxes on long distance and on local area passenger transportation were - $14.0 million and - $42.1 million respectively because of government subsidies.
Table 4: Direct and indirect contribution of tourism, VIC and AUS, 2006-07

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<tr>
<th>Direct contribution</th>
<th>VIC</th>
<th>AUS</th>
<th>Share (%)</th>
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<td>Tourism share of employment (%)</td>
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<table>
<thead>
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<th>Share (%)</th>
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<td>VIC</td>
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<td>Share (%)</td>
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<td>Tourism employment ('000)</td>
<td>179.247</td>
<td>848.791</td>
<td>21.1</td>
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Queensland 2006–07

Direct contribution to gross state product
Tourism’s direct contribution to Queensland’s gross state product (GSP) $8.8 billion:
• This was 4.5% of total GSP generated by all industries in Queensland.
• This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Direct contribution to gross value added
Tourism contributed $7.1 billion to Queensland’s gross value added (GVA):
• This was 3.9% of total GVA generated by all industries in Queensland.
• Australian tourism’s overall contribution to the national GVA is 3.4%.
• Queensland’s share of tourism GVA in Australia is 22.1%.
• This compares with Queensland’s contribution to GVA in all Australian industries of 18.9%.

Tourism GVA included $560.2 million from interstate trade effects that arise from the production of goods and services in Queensland, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in Queensland (refer figure 4) was generated in a wide range of industries including:
• accommodation 17.2%
• other retail trade 11.9%
• cafés, restaurants and food outlets 11.4%
• air and water transport 9.1%

Direct contribution to employment
Tourism was directly responsible for generating 118,898 jobs in Queensland.
• This represents 5.7% of all jobs in the state.
• It compares to tourism’s share of overall employment in Australia of 4.7%.
• Queensland contributes 24.6% of all tourism jobs in Australia
• This compares with Queensland’s share of all Australian jobs of 20.3%.

Indirect contribution of tourism
Tourism’s indirect economic contribution to the Queensland economy in 2006–07 was:
• $5.7 billion of industry GVA
• $6.1 billion of GSP
• 97,002 jobs

Tourism’s total contribution to the Queensland economy
The total of direct plus indirect tourism contribution generated by tourism and non-tourism industries in the Queensland economy was:
• $12.8 billion in GVA
• $14.9 billion in GSP
• 215,900 jobs
Tourism within Communities: The Flow of visitor expenditure through economies and industries

Tourism Queensland

Figure 4: Share of tourism industry GVA by industry sector, QLD, 2006–07

Tourism consumption
Tourism employment in Queensland included 5,571 jobs, which are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors
Tourism employment was spread across a wide range of sectors of the Queensland economy:
- retail trade 22.6%
- accommodation 17.2%
- cafés, restaurants and food outlets 11.8%
- travel agency and tour operator services 5.8%
- manufacturing 5.8%
- clubs, pubs, taverns and bars 5.5%
- education 5.4%
- road transport and motor vehicle hiring 5.1%
- air and water transport 9.9%

Net taxes
Net taxes on products arising from tourism consumption in Queensland raised $1.7 billion in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report *State and Federal Taxes on Tourism in Australia: estimates for 2003–04*.

Major sources of tax revenues were:
- fuel $484 million
- shopping $281 million
- alcohol $258 million
- takeaway and restaurant meals $216 million
- accommodation services $116 million
- gambling $84 million

Net taxes on long distance and on local area passenger transportation were -$18.1 million and -$40.0 million respectively because of government subsidies.
Table 5: Direct and indirect contribution of tourism, QLD and AUS, 2006-07

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<thead>
<tr>
<th>Direct contribution</th>
<th>QLD</th>
<th>AUS</th>
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<tbody>
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<td>Tourism net taxes on products ($m)</td>
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<table>
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<th>Indirect contribution</th>
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<td>Tourism employment (%)</td>
<td>44.929</td>
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South Australia 2006–07

Direct contribution to gross state product

Tourism’s direct contribution to South Australia’s gross state product (GSP) was $2.3 billion:
• This was 3.2% of total GSP generated by all industries in South Australia.
• This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Direct contribution to gross value added

Tourism contributed $1.8 billion to South Australia’s gross value added (GVA):
• This was 2.9% of total GVA generated by all industries in South Australia.
• Australian tourism’s overall contribution to the national GVA is 3.4%
• South Australia’s share of tourism GVA in Australia is 5.7%.
• This compares with South Australia’s share in GVA for all Australian industries of 6.5%.

Tourism GVA included $281.7 million from interstate trade effects that arise from the production of goods and services in South Australia, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in South Australia (refer figure 5) was generated in a wide range of industries including:
• other retail trade 16.6%
• accommodation 11.7%
• cafés, restaurants and food outlets 9.8%
• ownership of dwellings 9.3%
• air and water transport 8.2%
• beverage manufacturing (7.3%)

Direct contribution to employment

Tourism was directly responsible for generating 27,703 jobs in South Australia:
• This represents 3.7% of all jobs in the state.
• It compares to tourism’s share of overall employment in Australia of 4.7%.
• South Australia contributes 5.7% of all tourism jobs in Australia
• South Australia’s share of all Australian jobs is 7.3%.

Indirect contribution of tourism

Tourism’s indirect economic contribution to the South Australian economy in 2006–07 was:
• $1.9 billion of industry GVA
• $2 billion of GSP
• 23,788 jobs

Tourism’s total contribution to the South Australian economy

The total direct and indirect tourism contribution generated by tourism and non-tourism industries in South Australian was:
• $3.7 billion in GVA
• $4.3 billion in GSP
• 51,491 jobs
Tourism within Communities

Tourism within Communities: The Flow of Visitor Expenditure Through Economies and Industries

Tourism consumption

Tourism employment in South Australia included 2,078 employees who are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors

Tourism employment was spread across a wide range of sectors of the South Australian economy:

- retail trade 29.9%
- accommodation 13.4%
- cafés, restaurants and food outlets 11.7%
- manufacturing 7.9%
- education 6%
- clubs, pubs, taverns and bars 5.5%
- road transport and motor vehicle hiring 5.1%
- travel agency and tour operator services 4.7%
- air and water transport 4.6%

Net taxes

Net taxes on products arising from tourism consumption in South Australia raised $412.5 million in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report *State and Federal Taxes on Tourism in Australia: estimates for 2003–04.*

Major sources of tax revenues were:

- fuel $149 million
- alcohol $68 million
- shopping $57 million
- takeaway and restaurant meals $48 million
- accommodation services $20 million
- gambling $17 million

Net taxes on long distance and on local area passenger transportation were -$3 million and -$6 million respectively due to government subsidies.
### Table 5: Direct and indirect contribution, SA and AUS, 2006-07

<table>
<thead>
<tr>
<th></th>
<th>SA</th>
<th>AUS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Direct contribution</strong></td>
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<tr>
<td>Tourism GVA ($m)</td>
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<td>Tourism GSP, GDP ($m)</td>
<td>2255.490</td>
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<td>Tourism employment ('000)</td>
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<td>GVA ($m)</td>
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<td>961880.260</td>
</tr>
<tr>
<td>Tourism share of GVA (%)</td>
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<td>3.400</td>
</tr>
<tr>
<td>GSP, GDP ($m)</td>
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<td>1046364.000</td>
</tr>
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<td>Tourism share of GSP, GDP (%)</td>
<td>3.243</td>
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</tr>
<tr>
<td>Employment ('000)</td>
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<td>Tourism share of employment (%)</td>
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<td><strong>Indirect contribution</strong></td>
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<td>Tourism GVA ($m)</td>
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<td><strong>Total contribution</strong></td>
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<td>Tourism net taxes on products ($m)</td>
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<td>Tourism GSP, GDP ($m)</td>
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<td>Tourism employment ('000)</td>
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<td><strong>Ratio of total to direct</strong></td>
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<td><strong>Share of indirect in total contribution</strong></td>
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<tr>
<td>Tourism GVA (%)</td>
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<tr>
<td>Tourism net taxes on products (%)</td>
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<td>Tourism GSP, GDP (%)</td>
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<tr>
<td>Tourism employment (%)</td>
<td>46.198</td>
<td>43.107</td>
</tr>
</tbody>
</table>
Western Australia 2006–07

Direct contribution to gross state product
Tourism’s direct contribution to Western Australia’s gross state product (GSP) is $3.7 billion:
- This was 2.6% of total GSP generated by all industries in Western Australia.
- This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Direct contribution to gross value added
Tourism contributed $3 billion to Western Australia’s gross value added (GVA):
- This was 2.3% of total GVA generated by all industries in Western Australia.
- This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.4%.
- Western Australia’s share of tourism GVA in Australia is 9.2%.
- This compares with Western Australia’s share in GVA for all Australian industries of 13.3%.

Tourism GVA included $237.4 million from interstate trade effects that arise from the production of goods and services in Western Australia, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in Western Australia (refer figure 14) was generated in a wide range of industries including:
- other retail trade 15.4%
- accommodation 14.6%
- cafés, restaurants and food outlets 9.4%
- education 7.4%
- air and water transport 7.1%
- ownership of dwellings 6.1%

Direct contribution to employment
Tourism was directly responsible for generating 45,660 jobs in the Western Australian economy:
- This was 4.2% of all jobs in Western Australia.
- It can be compared to tourism’s share of total employment in Australia of 4.7%.
- Western Australia’s share of tourism jobs in Australia as a whole was 9.5%.
- This compares with Western Australia’s share of all Australian jobs of 10.5%.

Indirect contribution of tourism
Tourism’s indirect economic contribution to the Western Australian economy in 2006–07 was:
- $3.2 billion of industry GVA
- $3.4 billion of GSP
- 34,317 jobs

Tourism’s total contribution to the Western Australian economy
The total of direct plus indirect tourism contribution generated by tourism and non-tourism industries in the Western Australian economy was:
- $6.2 billion in GVA
- $7 billion in GSP
- 79,977 jobs
Tourism consumption

Tourism employment in Western Australia included 2,218 jobs, which are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors

Tourism employment was spread across a wide range of sectors of the Western Australian economy:

- retail trade 29%
- accommodation 14.9%
- cafés, restaurants and food outlets 10%
- education 8%
- manufacturing 5.9%
- road transport and motor vehicle hiring 5.2%
- clubs, pubs, taverns and bars 4.7%
- air and water transport 4.1%
- travel agency and tour operator services 4.1%

Net taxes

Net taxes on products arising from tourism consumption in Western Australia raised $682.1 million in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report State and Federal Taxes on Tourism in Australia: estimates for 2003–04.

Major sources of tax revenues were:

- fuel $238 million
- alcohol $105 million
- shopping $96 million
- takeaway and restaurant meals $76 million
- accommodation services $42 million
- gambling $31 million

Net taxes on long distance and on local area passenger transportation were -$8 million and -$13 million respectively because of government subsidies.
### Table 6: Direct and indirect contribution of tourism, WA and AUS, 2006-07

<table>
<thead>
<tr>
<th></th>
<th>WA</th>
<th>AUS</th>
<th>Share (%)</th>
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<td><strong>Direct contribution</strong></td>
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<td>Tourism GVA ($m)</td>
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<td>32306.021</td>
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<td>Tourism net taxes on products ($m)</td>
<td>682.065</td>
<td>6630.048</td>
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<td>Tourism GSP, GDP ($m)</td>
<td>3654.720</td>
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<td>Tourism employment ('000)</td>
<td>45.660</td>
<td>482.900</td>
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<td>GVA ($m)</td>
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<td>Tourism share of GVA (%)</td>
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<td>Tourism share of GSP, GDP (%)</td>
<td>2.585</td>
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<tr>
<td>Employment ('000)</td>
<td>1085.529</td>
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<td>10.5</td>
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<tr>
<td>Tourism share of employment (%)</td>
<td>4.206</td>
<td>4.687</td>
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<tr>
<td><strong>Indirect contribution</strong></td>
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<td></td>
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<td>Tourism GVA ($m)</td>
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<td>Tourism employment ('000)</td>
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<tr>
<td><strong>Total contribution</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Tourism GVA ($m)</td>
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<tr>
<td>Tourism net taxes on products ($m)</td>
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<td>Tourism GSP, GDP ($m)</td>
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<td>68508.072</td>
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<tr>
<td>Tourism employment ('000)</td>
<td>79.977</td>
<td>848.791</td>
<td>9.4</td>
</tr>
</tbody>
</table>
Tasmania 2006–07

Direct contribution to gross state product
Tourism’s direct contribution to Tasmania’s gross state product (GSP) was $1.024 billion:
• This was 4.9% of total GSP generated by all industries in Tasmania.
• This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Direct contribution to gross value added
Tourism contributed $836 million to Tasmania’s gross value added (GVA):
• This was 4.5% of total GVA generated by all industries in Tasmania.
• Australian tourism’s overall contribution to the national GVA is 3.4%
• Tasmania’s share of tourism GVA in Australia is 2.6%.
• This compares with Tasmania’s share in GVA for all Australian industries of 1.9%.

Tourism GVA included $74.7 million from interstate trade effects that arise from the production of goods and services in Tasmania, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in Tasmania (refer figure 7) was generated in a wide range of industries including:
• other retail trade 16.5%
• accommodation 13.8%
• travel agency and tour operator services 11.2%
• cafés, restaurants and food outlets 10.8%
• motor vehicle hiring 6.2%
• air and water transport 6%

Direct contribution to employment
Tourism was directly responsible for generating 13,696 jobs in the Tasmanian economy:
• This represents 6.1% of all jobs in Tasmania.
• It can be compared to tourism’s overall employment in Australia of 4.7%.
• Tasmania contributes 2.8% to all tourism jobs in Australia.
• This compares with Tasmania’s share of all Australian jobs of 2.2%.

Indirect contribution of tourism
Tourism’s indirect economic contribution to the Tasmanian economy in 2006–07 was:
• $702 million of industry GVA
• $757 million of GSP
• 11,145 jobs

Tourism’s total contribution to the Tasmanian economy
The total of direct plus indirect tourism contribution generated by tourism and non-tourism industries in the Tasmanian economy was:
• $1.5 billion in GVA
• $1.8 billion in GSP
• 24,841 jobs
Tourism consumption
Tourism employment in Tasmania included 889 jobs, which are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors
Tourism employment was spread across a wide range of sectors of the Tasmanian economy:
- retail trade 26.9%
- accommodation 13.8%
- cafés, restaurants and food outlets 11.2%
- travel agency and tour operator services 10.4%
- manufacturing 8.2%
- road transport and motor vehicle hiring 6.5%
- clubs, pubs, taverns and bars 5.2%
- education 5%
- air and water transport 3.1%

Net taxes
Net taxes on products arising from tourism consumption in Tasmania raised $188.4 million in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report State and Federal Taxes on Tourism in Australia: estimates for 2003–04.

Major sources of tax revenues were:
- fuel $66 million
- shopping $28 million
- alcohol $27 million
- takeaway and restaurant meals $24 million
- gambling $13 million
- accommodation services $11 million

Net taxes on long distance and on local area passenger transportation were -$2 million and -$4 million respectively because of government subsidies.
Northern Territory 2006–07

Direct contribution to gross state product
Tourism’s direct contribution to Northern Territory’s gross state product (GSP) was $934 million:
- This was 6.4% of total GSP generated by all industries in the Northern Territory.
- This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Direct contribution to gross value added
Tourism contributed $776 million to Northern Territory’s gross value added (GVA):
- This was 5.8% of total GVA generated by all industries in Northern Territory.
- Australian tourism’s overall contribution to the national GVA is 3.4%
- Northern Territory’s share of tourism GVA in Australia as a whole was 2.4%.
- This compares with Northern Territory’s share in GVA for all Australian industries of 1.4%.

Tourism’s direct contribution to Northern Territory’s gross state product was $934 million:
- This was 6.4% of total GSP generated by all industries in the Northern Territory.
- This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

Tourism contributed $776 million to Northern Territory’s gross value added (GVA):
- This was 5.8% of total GVA generated by all industries in Northern Territory.
- Australian tourism’s overall contribution to the national GVA is 3.4%
- Northern Territory’s share of tourism GVA in Australia as a whole was 2.4%.
- This compares with Northern Territory’s share in GVA for all Australian industries of 1.4%.

Tourism GVA included $124.6 million from interstate trade effects that arise from the production of goods and services in Northern Territory, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in Northern Territory (refer figure 8) was generated in a wide range of industries including:
- air and water transport 16.7%
- accommodation 15.2%
- other retail trade 12.7%
- motor vehicle hiring 8.1%
- travel agency and tour operator services 8.1%
- cafés, restaurants and food outlets 8%
- other road transport 7.9%
- education 3.2%
- clubs, pubs, taverns and bars 2.6%

Direct contribution to employment
Tourism was directly responsible for generating 9,682 jobs in the Northern Territory economy:
- This represents 9.4% of all jobs in the territory
- It compares to tourism’s share of overall employment in Australia of 4.7%.
- The Northern Territory contributes 2% of all tourism jobs in Australia
- This compares with Northern Territory’s share of all Australian jobs of 1%.

Indirect contribution of tourism
Tourism’s indirect economic contribution to the Northern Territory economy in 2006–07 was:
- $703 million of industry GVA
- $749 million of GSP
- 7,315 jobs

Tourism’s total contribution to the Northern Territory economy
The total of direct plus indirect tourism contribution generated by tourism and non-tourism industries in the Northern Territory economy was:
- $1.5 billion in GVA
- $1.7 billion in GSP
- 16,997 jobs
Tourism within Communities

THE FLOW OF VISITOR EXPENDITURE THROUGH ECONOMIES AND INDUSTRIES

Tourism consumption
Tourism employment in Northern Territory included 852 jobs, which are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors
Tourism employment was spread across a wide range of sectors of the Northern Territory economy:
- retail trade 31%
- accommodation 13.5%
- road transport and motor vehicle hiring 10%
- travel agency and tour operator services 10%
- air and water transport 9.1%
- cafés, restaurants and food outlets 7.4%
- education 3.9%
- clubs, pubs, taverns and bars 3.4%

Net taxes
Net taxes on products arising from tourism consumption in Northern Territory raised $158.1 million in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report State and Federal Taxes on Tourism in Australia: estimates for 2003–04.

Major sources of tax revenues were:
- fuel $54 million
- alcohol $21 million
- takeaway and restaurant meals $17 million
- shopping $16 million
- accommodation services $12 million
- gambling $11 million

Net taxes on long distance and on local area passenger transportation were -$3 million and -$4 million respectively because of government subsidies.
Table 8: Direct and indirect contribution of tourism, NT and AUS, 2006–07

<table>
<thead>
<tr>
<th>Direct contribution</th>
<th>NT</th>
<th>AUS</th>
<th>Share (%)</th>
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</thead>
<tbody>
<tr>
<td>Tourism GVA ($m)</td>
<td>775.777</td>
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<td>Tourism GSP, GDP ($m)</td>
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<td>GVA ($m)</td>
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<td>Tourism share of GSP, GDP (%)</td>
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<td>Employment ('000)</td>
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<tr>
<td>Tourism share of employment (%)</td>
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<td>4.687</td>
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<table>
<thead>
<tr>
<th>Indirect contribution</th>
<th>NT</th>
<th>AUS</th>
<th>Share (%)</th>
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</table>

<table>
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<th>Total contribution</th>
<th>NT</th>
<th>AUS</th>
<th>Share (%)</th>
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<tbody>
<tr>
<td>Tourism GVA ($m)</td>
<td>1478.979</td>
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<td>Tourism net taxes on products ($m)</td>
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<tr>
<td>Tourism employment ('000)</td>
<td>16.997</td>
<td>848.791</td>
<td>2.0</td>
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</tbody>
</table>
TOURISM within Communities
THE FLOW OF VISITOR EXPENDITURE THROUGH ECONOMIES AND INDUSTRIES

Australian Capital Territory 2006–07

**Direct contribution to gross state product**
Tourism’s direct contribution to Australian Capital Territory’s gross state product (GSP) was $696 million:
- This was 3.2% of total GSP generated by all industries in the Australian Capital Territory.
- This compares to Australian tourism’s overall contribution to gross domestic product (GDP) of 3.7%.

**Direct contribution to gross value added**
Tourism contributed $566 million to Australian Capital Territory’s gross value added (GVA):
- This was 2.8% of total GVA generated by all industries in the Australian Capital Territory.
- Australian tourism’s overall contribution to the national GVA is 3.4%.
- Australian Capital Territory’s share of tourism GVA in Australia is 1.8%.
- This compares with Australian Capital Territory’s share in GVA for all Australian industries of 2.1%.

Tourism GVA included $48.4 million from interstate trade effects that arise from the production of goods and services in Australian Capital Territory, which are subsequently consumed by visitors in the other Australian states or territories.

Tourism GVA in Australian Capital Territory (Refer figure 9) was generated in a wide range of industries including:
- other retail trade 17.6%
- accommodation 16.4%
- cafés, restaurants and food outlets 12.2%
- air and water transport 8.1%
- travel agency and tour operator services 7.2%
- ownership of dwellings 7.1%

**Direct contribution to employment**
Tourism was directly responsible for generating 7,280 jobs in the Australian Capital Territory economy:
- This represents 3.9% of all jobs in the Australian Capital Territory.
- It compares to tourism’s share of overall employment in Australia of 4.7%.
- Australian Capital Territory contributes 1.5% of all tourism jobs in Australia.
- This compares with Australian Capital Territory’s share of all Australian jobs of 1.8%.

**Indirect contribution of tourism**
Tourism’s indirect economic contribution to the Australian Capital Territory economy in 2006–07 was:
- $496 million of industry GVA
- $529 million of GSP
- 5,610 jobs

**Tourism’s total contribution to the Australian Capital Territory’s economy**
The total of direct plus indirect tourism contribution generated by tourism and non-tourism industries in the Australian Capital Territory economy was:
- $1,062 million in GVA
- $1,225 million in GSP
- 12,890 jobs
Tourism consumption

Tourism employment in Australian Capital Territory included 330 jobs, which are engaged in production of goods and services for tourism consumption in the other Australian states and territories.

Employment sectors

Tourism employment was spread across a wide range of sectors of the Australian Capital Territory economy:

- retail trade 34.5%
- accommodation 14.1%
- cafés, restaurants and food outlets 10.9%
- travel agency and tour operator services 8.6%
- education 6.7%
- road transport and motor hiring 6.1%
- clubs, pubs, taverns and bars 5.1%
- air and water transport 4.1%
- other entertainment services 2.2%

Net taxes

Net taxes on products arising from tourism consumption in Australian Capital Territory raised $130.3 million in federal, state and local government revenues. This does not include taxes incurred in the process of producing tourism goods and services, such as payroll tax and fringe benefits tax (FBT). Further information in relation to those taxes is provided in a separate STCRC CEP report State and Federal Taxes on Tourism in Australia: estimates for 2003–04.

Major sources of tax revenues were:

- fuel $45 million
- takeaway and restaurant meals $19 million
- alcohol $15 million
- shopping $15 million
- gambling $11 million
- accommodation services $9 million
TOURISM within Communities
THE FLOW OF VISITOR EXPENDITURE THROUGH ECONOMIES AND INDUSTRIES

Table 9: Direct and indirect contribution of tourism, ACT and AUS, 2006–07

<table>
<thead>
<tr>
<th>Direct contribution</th>
<th>ACT</th>
<th>AUS</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism GVA ($m)</td>
<td>565.788</td>
<td>32306.021</td>
<td>1.8</td>
</tr>
<tr>
<td>Tourism net taxes on products ($m)</td>
<td>130.261</td>
<td>6630.048</td>
<td>2.0</td>
</tr>
<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>696.049</td>
<td>38936.070</td>
<td>1.8</td>
</tr>
<tr>
<td>Tourism employment ('000)</td>
<td>7.280</td>
<td>482.900</td>
<td>1.5</td>
</tr>
<tr>
<td>GVA ($m)</td>
<td>20170.125</td>
<td>961880.260</td>
<td>2.1</td>
</tr>
<tr>
<td>Tourism share of GVA (%)</td>
<td>2.805</td>
<td>3.400</td>
<td></td>
</tr>
<tr>
<td>GSP, GDP ($m)</td>
<td>21586.000</td>
<td>1046364.000</td>
<td>2.1</td>
</tr>
<tr>
<td>Tourism share of GSP, GDP (%)</td>
<td>3.225</td>
<td>3.700</td>
<td></td>
</tr>
<tr>
<td>Employment ('000)</td>
<td>188.007</td>
<td>10302.419</td>
<td>1.8</td>
</tr>
<tr>
<td>Tourism share of employment (%)</td>
<td>3.872</td>
<td>4.687</td>
<td></td>
</tr>
</tbody>
</table>

Indirect contribution

<table>
<thead>
<tr>
<th>ACT</th>
<th>AUS</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism GVA ($m)</td>
<td>495.730</td>
<td>27938.817</td>
</tr>
<tr>
<td>Tourism net taxes on products ($m)</td>
<td>33.301</td>
<td>1633.190</td>
</tr>
<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>529.031</td>
<td>29572.007</td>
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<tr>
<td>Tourism employment ('000)</td>
<td>5.610</td>
<td>365.891</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total contribution</th>
<th>ACT</th>
<th>AUS</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism GVA ($m)</td>
<td>1061.518</td>
<td>60244.835</td>
<td>1.8</td>
</tr>
<tr>
<td>Tourism net taxes on products ($m)</td>
<td>163.562</td>
<td>8263.238</td>
<td>2.0</td>
</tr>
<tr>
<td>Tourism GSP, GDP ($m)</td>
<td>1225.080</td>
<td>68508.072</td>
<td>1.8</td>
</tr>
<tr>
<td>Tourism employment ('000)</td>
<td>12.890</td>
<td>848.791</td>
<td>1.5</td>
</tr>
</tbody>
</table>

*Footnote: It should be noted that some changes in data sources mean that results from 2006–07 are not directly comparable with those used in the STCRC 2003–04 TSA report. This applies particularly to employment estimates.

Want more information?
STCRC has developed separate tourism satellite accounts for each of Australia’s states and territories. These research reports provide a more detailed analysis of the contribution of tourism to the state and territory economies. They are available for free download through the STCRC online bookshop www.crctourism.com.au/bookshop.
Tourism within Communities: the flow of visitor expenditure through economies and industries
• Travel and tourism industry
• Academic researchers
• Government policy makers

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RESEARCH AND DEVELOPMENT
COLLABORATION
EDUCATION AND TRAINING
UTILISE

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• Improved business productivity
• Industry-ready post-graduate students
• Public good benefits for tourism destinations

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