

NEW SOUTH WALES TOURISM SATELLITE ACCOUNT



By Larry Dwyer, Peter Forsyth, Ray Spurr and Thiep Ho

SUSTAINABLE
TOURISM



CRC

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Summary

Overview of Results

In 2000/01 the tourism industry contributed \$10.8 billion (4.5%) to New South Wales Gross State Product (GSP) and \$8.9 billion (4.1%) to New South Wales Gross Value Added (GVA). Tourism directly contributed 6.1 % of total New South Wales employment and 13.4 % of New South Wales's total international exports of goods and services.

Tourism's total worth is greater than its direct contribution. If the indirect or flow on effects from tourism related expenditure are included, the tourism's contribution to New South Wales GSP rises to \$ 20.89 billion, or 8.75 % of total New South Wales GSP. The number of jobs in the New South Wales economy which flow from tourism related expenditure is 246,060 or 8.083% of total New South Wales employment.

Every 1,000 international visitors generate 25.3 jobs and every 1,000 interstate visitors a further 6.6 jobs.

Consumption

Tourism consumption in New South Wales in 2000/01 was \$23.3 billion or 32.7% of total tourism consumption in Australia. The main commodities consumed was: Air Transport (17%); Shopping (15.7%); Takeaway and Restaurant Meals (14%); Accommodation Services (9.1%); Fuel (7.7%) and Food Products (7.6%).

Consumption in New South Wales is higher than the national average in Education; Air Transport; Local Area Passenger Transportation; Shopping; Other Long Distance Transport Costs; and Taxi Fares.

Intrastate visitor expenditures account for 44.3% of tourism's direct contribution to the New South Wales economy, intrastate visitors 44.3%, interstate 23.1%; and international visitors 27.3%. Expenditure in New South Wales by outbound tourists accounts for the remaining 5.2%.

Exports

International visitors contribute \$6.365 billion in export income to the New South Wales economy. Spending in New South Wales by residents from other states and territories of \$5.398 billion also equates to export income for New South Wales.

Every 1,000 international visitors generates \$2.297 million in tourism consumption in New South Wales. Every 1,000 visitors from other states and territories generate on average \$650 million in tourism consumption.

Output

Tourism industry output in New South Wales in 2000/01 was \$20.356 billion or 33.1% of Australia's total tourism output.

Industries in New South Wales with tourism output above the national average for tourism in that industry are: Food Manufacturing; Beverage Manufacturing; Automotive Fuel Retailing; Other Retail Trade; Education; Casinos and Other Gambling Services; Libraries, Museums and Arts; Other Entertainment Services; and All Other Industries

Gross State Product (GSP)

New South Wales Tourism GSP is equal to \$10.8 billion or 4.5% of total New South Wales GSP. New South Wales accounts for 34% of tourism GDP in Australia.

By origin, 45.2% of tourism GSP in New South Wales comes from intrastate visitor expenditure, 23.2% from interstate visitor expenditure, 27.2% from international visitor expenditure, and 4.4% from outbound traveller expenditure.

Holiday travel expenditure contributes 51.5% of Tourism GSP in New South Wales, VFR 19.4%, Business 15.2%, and Other 13.9%.

Gross Value Added (GVA)

Tourism contributes \$8.922 billion in gross value added to the New South Wales economy or 4.15% of New South Wales total industry gross value. New South Wales accounts for 33.9% of total tourism gross value added in Australia.

Intrastate visitor expenditures account for 43.7% of tourism GVA in New South Wales; interstate visitors 23.2%, and international visitors 28.8%. Expenditure by outbound travellers accounts for 4.4% of New South Wales GVA.

The main industry contributors to New South Wales tourism GVA are: Air and Water Transport (14.3%); Other Retail Trade (11.1%); Accommodation (9.5%); Cafes, Restaurants and Food Outlets (8.5%); Education (5.5%); and Ownership of Dwellings (5.3%).

Industries for which tourism's share of GVA in New South Wales is higher than the national average for tourism in that industry are: Food Manufacturing; Beverage Manufacturing; Automotive Fuel Retailing; Other Retail Trade; Casinos and Other Gambling Services, Libraries, Museums and Arts; Other Entertainment Services; and Education.

Comparison with 'Non-tourism' Industries

Based on its \$8.922 billion contribution to New South Wales GVA in 2000/2001, Tourism ranks 11th when compared with the traditional eighteen ANZSIC code industries.

Tourism is larger than Agriculture, Forestry and Fishing; Mining; Communication services; Personal and Other Services; Electricity, Gas and Water Supply; Accommodation, Cafes and Restaurants; Government Administration and Defence; and Cultural and Recreational Services.

New South Wales accounts for 33.9% of tourism GVA in Australia, which is slightly below New South Wales's 35.3% share of GVA for all industries in Australia.

Employment

Tourism directly contributed 185,144 jobs or 6.1% of total New South Wales employment in 2000/01. This is higher than tourism's share of employment in the Australian economy as a whole (6.0%). The share of New South Wales in total tourism employment in Australia is 33.7%.

Retail Trade generated the most tourism employment (32.9%), followed by Accommodation (14.4%), and Cafes, Restaurants and Food Outlets (7.4%). The Retail Trade and the Education industry sectors have higher levels of tourism induced employment in New South Wales than they do in Australia as a whole.

Indirect Contribution of Tourism to New South Wales

Tourism's total worth is greater than its direct contribution. Direct effects cover items such as accommodation, transport, food and beverage, shopping, touring, entertainment etc. Indirect effects occur when firms that sell goods and services to visitors purchase inputs from other firms and these other firms (suppliers) purchase inputs from other firms (suppliers).

Almost every industry in the economy is affected to some extent by the indirect effects of the initial tourist expenditure.

For Real Output, the indirect effect is 52% greater than the direct effects. Total real output for New South Wales, allowing for both the direct and indirect effects of tourism expenditure is \$ 58.8 billion.

For Real GSP, the indirect effects are less than the direct effects. Addition of the indirect effects to the direct effects implies that the contribution of tourism to New South Wales GSP is \$ 20.890 billion, or 8.75% of total New South Wales

GSP

Including indirect effects, 246,060 jobs in New South Wales are tourism related. This equates to 8.083% of total New South Wales employment.

Taking indirect employment effects into account one job is maintained/created in New South Wales for every \$94,700 of tourist consumption.

Every 1,000 international visitors generates, on average, 25.3 jobs. Every 1,000 visitors to New South Wales from the other states and territories of Australia (RoA) generates, on average, 6.6 jobs.

Chapter 1

Introduction

The concept of a Tourism Satellite Account (TSA) emerged internationally following an International Conference on Travel and Tourism Statistics organised by the World Tourism Organization (WTO) in 1991. This led to publication by the WTO in 1995 of *Tourism Satellite Account (TSA) – The Conceptual Framework* which set out a recommended framework for such accounts designed to be consistent with the UN endorsed System of National Accounts 1993. Since that time a growing number of countries, including Australia in October 2000, have developed TSA's at the national level (See *Australian National Accounts: Tourism Satellite Account 1997/98*, subsequently updated with the release of figures for 2000/01).

Because the National Accounts have traditionally not allowed ready classification of tourism industry it has been difficult to clearly identify the size and value of the industry. A TSA extracts from the National Accounts the contribution which tourism makes to each other sector of the economy allowing measurement of the true contribution of tourism to GDP (or GSP) and permitting comparison with other economic sectors listed in the national accounts.

The extension of TSA's to the state or regional level is still in its infancy internationally, although in Australia the state of Queensland has invested substantial resources in this work and published its first TSA report for Queensland in 2002.

To develop this TSA for the state of New South Wales (New South Wales), we have utilised the data sources from the national TSA published by the Australian Bureau of Statistics (ABS) and statistical data from the Bureau of Tourism Research (BTR). In terms of tourism commodities and industries for New South Wales, the results are consistent with those for the national TSA.

Types of visitors, or tourism, are classified as domestic, outbound and inbound. To examine the contribution of domestic tourism to the New South Wales economy in more detail, domestic tourism has been further divided into intrastate and interstate tourism. A two region framework - New South Wales and Rest-of-Australia (RoA) – has been adopted for this study. RoA includes all other States and both Territories. In this model intrastate tourism in New South Wales represents travel within New South Wales by New South Wales households and interstate tourism in New South Wales represents travel in New South Wales by households from RoA. Conversely, intrastate tourism in RoA represents travel within RoA by its households, and interstate tourism in RoA represents travelling to RoA by New South Wales households.

It is necessary to construct patterns of tourism consumption for RoA, as well as for New South Wales, because tourism consumption in RoA also creates demand for New South Wales sourced products, which in turn has effects on the New South Wales economy.

The estimates of tourism consumption, output, value added and gross state product (GSP) in this TSA are recorded at current prices.

The concepts, sources and methods used in the TSA are described in Appendix A.

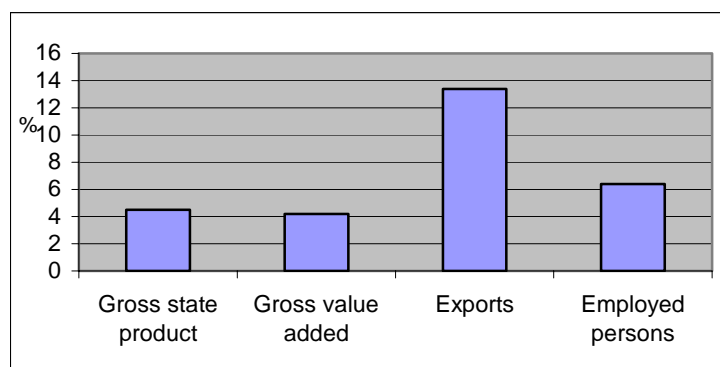
Chapter 2

Key Results

In 2000/01 the tourism industry's direct contribution to the economy of New South Wales was as follows:

- Tourist consumption \$23.3 billion
- Tourism industry contribution to output \$20.356 billion
- Tourism industry contribution to Gross State Product \$10.822 billion (4.5%)
- Tourism industry contribution to Gross Value Added \$8.92 billion (4.1%)
- Tourism industry contribution to Australian exports \$6.37 billion (13.4%)
- Tourism industry contribution to NSW employment [comprising 6.1% of total New South Wales employment] 185,144 jobs
- Share of NSW in Australia's tourism Gross Value Added 33.98%
- Share of NSW in tourism Gross Domestic Product 33.98%
- Tourism ranks as 11th among major industry sectors in the state.

Figure 1: Tourism's Share of the Economy of NSW, 2000/01



Chapter 3

Analysis of Results

Tourism is not an industry in the traditional sense because an industry is normally identified by the production of goods and services through the employment of intermediate inputs, capital, land and labour. The “tourism industry”, by contrast, is identified from the demand side through demand for various commodities from tourism characteristic and connected industries. This in turn generates effects on output, value added, Gross State Product and employment.

The results presented below relate to the tourism industry in New South Wales 2000/01.

Tourism consumption of \$23.3 billion directly contributes \$10.8 billion (4.5%) to New South Wales Gross State Product (GSP) and \$8.9 billion (4.1%) to New South Wales Gross Value Added (GVA). Tourism also contributes to employment and exports. In 2000/01, tourism directly contributed 6.1 % of total New South Wales employment. It also contributed 13.4% of New South Wales’s total international exports of goods and services.

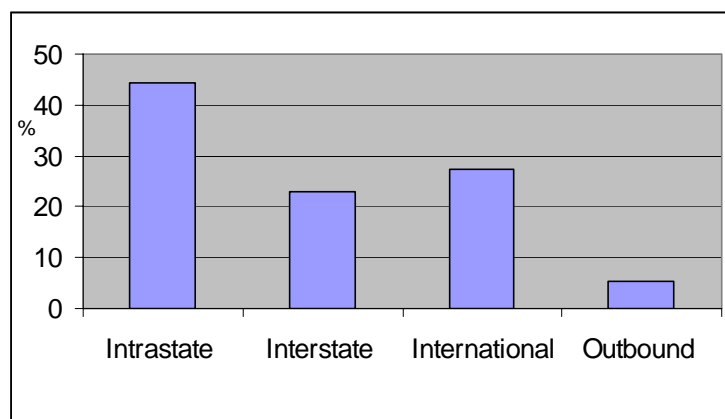
New South Wales accounted for \$23.3 billion of tourism consumption in 2000/01.

Tourism Consumption by Origin and Purpose of Travel

Table 1: Total tourism consumption, New South Wales, by origin and purpose of travel, 2000/01

| | Holiday | VFR | Business | Other | Total (\$m) | Share of NSW Tourism Consumption (%) |
|------------------------|-----------|----------|----------|----------|-------------|--------------------------------------|
| Intrastate | 6193.2 | 2215.8 | 1122.3 | 788.6 | 10319.9 | 44.3 |
| Interstate | 2671.7 | 1240.5 | 1310.2 | 175.8 | 5398.1 | 23.1 |
| Outbound | | | | | 1210.3 | 5.2 |
| Inbound | 2592.022 | 940.531 | 1062.136 | 1770.454 | 6365.144 | 27.3 |
| Total | 11456.922 | 4396.831 | 3494.636 | 2734.854 | 23293.444 | 100 |
| % (excluding outbound) | 51.881 | 19.910 | 15.825 | 12.384 | | 100 |

Figure 2: Share of New South Wales tourism consumption by origin



By origin, the share of visitor expenditure in tourism’s direct contribution to the New South Wales economy is:

- Intrastate visitor expenditure 44.3%
- Interstate visitor expenditure 23.1%
- International visitor expenditure 27.3%
- Outbound traveller expenditure 5.2%

The spending by international tourists (\$6.365 billion) represents export income into the State economy as does the spending in the State by residents from other states (\$5.398 billion).

Every 1,000 international visitors generates, on average, \$2.297 million in tourism consumption expenditure (\$6.365 billion from 2,771,000 overseas visitors; 2000/2001 figures).

Every 1,000 visitors to New South Wales from the other states and territories of Australia (RoA) generates, on average, \$650 million in tourism consumption expenditure (\$5.398 billion from 8,286,000 interstate visitors; 2000/2001 figures).

Outbound traveller expenditure includes the expenditure in New South Wales incurred by New South Wales residents making trips overseas - for example, international air travel on Australian airlines producing in New South Wales, and accommodation before and after flights.

The shares of visitor expenditure in New South Wales allocated by purpose of travel (excluding outbound) are:

- Holiday 51.9%
- VFR 19.9%
- Business 15.8%
- Other 12.4%

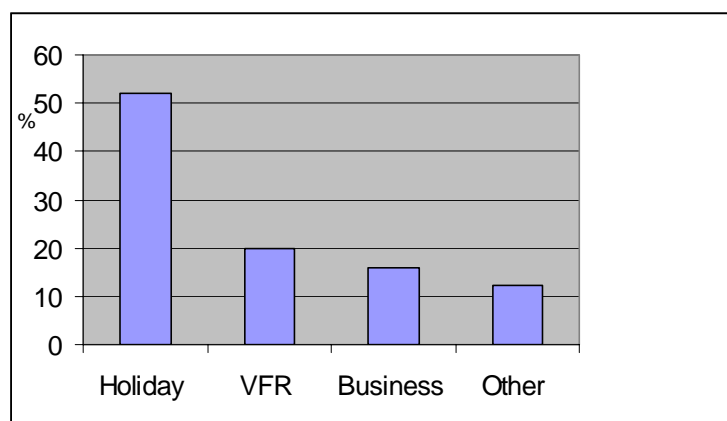


Figure 3: Share of New South Wales tourism consumption by purpose of visit

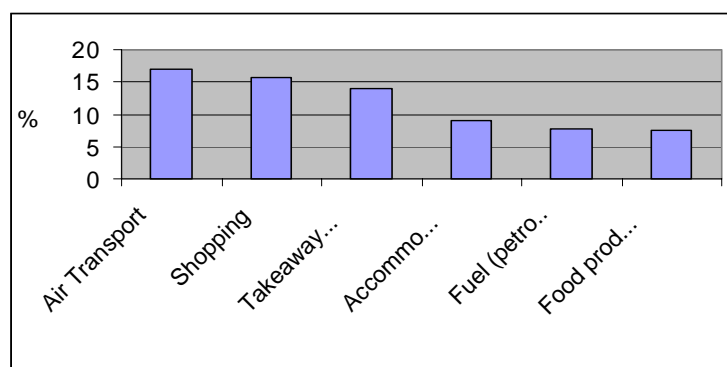
Tourism Consumption by Origin and Commodity

The main tourism consumption commodities by their share in total New South Wales tourism consumption are:

- Air Transport 17%
- Shopping 15.7%
- Takeaway and restaurant meals 14%
- Accommodation services 9.1%
- Fuel (petrol, diesel) 7.7%
- Food products 7.6%

These are the industries in New South Wales that rely most on tourism demand.

Figure 4: Share of New South Wales tourism consumption by commodity



Consumption patterns vary by origin of the tourist. Air Transport, Shopping and Accommodation services are the dominant tourism products consumed by international visitors. Interstate visitor expenditure is dominated by Air Transport, Takeaway and Restaurant Meals, Accommodation Services and Shopping. In contrast, intrastate visitor expenditure is dominated by Shopping, Takeaway and Restaurant Meals, and Fuel.

Table 2: Tourism consumption by origin and commodity, selected tourism products, by type of visitor, New South Wales, 2000/01, \$m

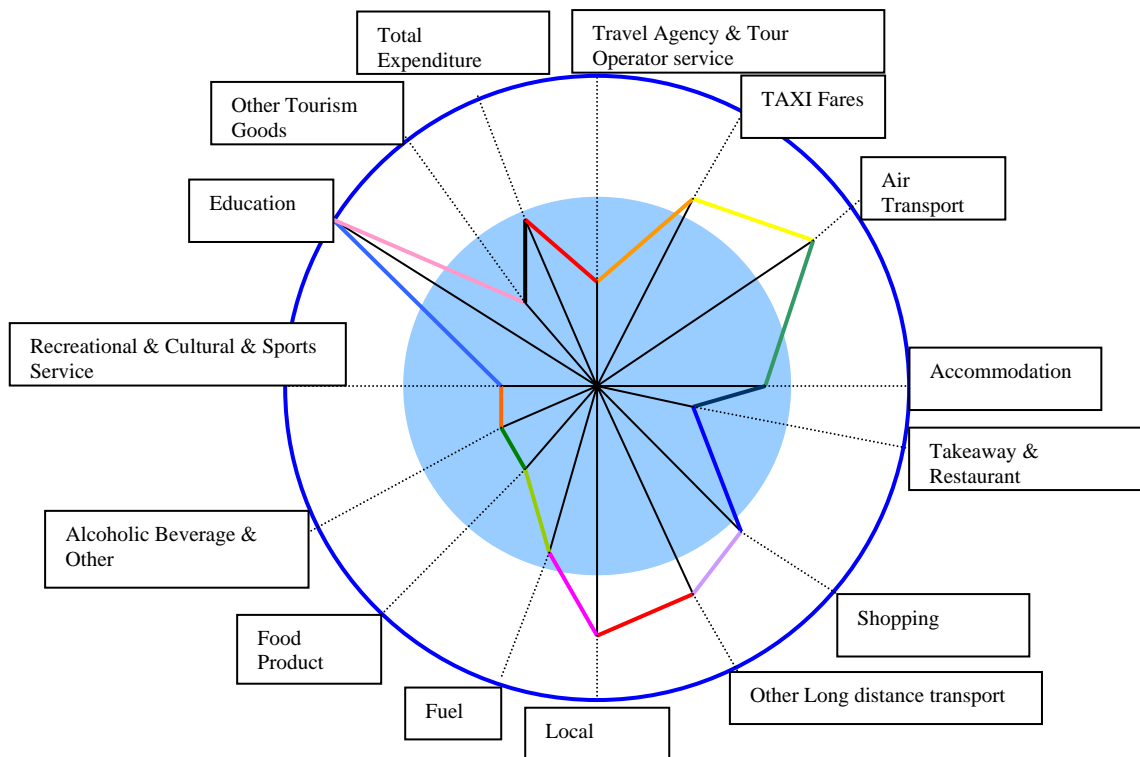
| COMMODITIES | NSW Total | NSW tourism consumption (%) | Australia total | Aust. tourism consumption (%) | NSW share of total Aust. (%) |
|--|-----------------|-----------------------------|-----------------|-------------------------------|------------------------------|
| Travel agency and tour operator services | 714.663 | 3.068 | 2271.099 | 3.187 | 31.468 |
| Taxi fares | 189.376 | 0.813 | 576.948 | 0.809 | 32.824 |
| Air transport | 3933.817 | 16.888 | 11203.243 | 15.723 | 35.113 |
| Accommodation services | 2111.933 | 9.067 | 6535.102 | 9.172 | 32.317 |
| Takeaway and restaurant meals | 3264.982 | 14.017 | 10366.908 | 14.549 | 31.494 |
| Shopping (including gifts and souvenirs) | 3666.531 | 15.741 | 11103.877 | 15.584 | 33.020 |
| Other long distance transport costs | 543.198 | 2.332 | 1616.594 | 2.269 | 33.601 |
| Local area passenger transportation | 124.473 | 0.534 | 365.103 | 0.512 | 34.093 |
| Fuel (petrol, diesel) | 1791.624 | 7.692 | 5585.001 | 7.838 | 32.079 |
| Food products | 1764.068 | 7.573 | 5565.105 | 7.810 | 31.699 |
| Alcoholic beverages and other beverages | 1038.244 | 4.457 | 3305.009 | 4.638 | 31.414 |
| Recreational, cultural and sports services | 777.248 | 3.337 | 2500.999 | 3.509 | 31.078 |
| Education | 557.314 | 2.393 | 1416 | 1.987 | 39.358 |
| Other tourism goods and services | 2815.973 | 12.088 | 8842.912 | 12.410 | 31.844 |
| Total expenditure, \$m | 23293.44 | 100 | 71253.9 | 100 | 32.691 |

New South Wales accounted for 32.7% of total tourism consumption in Australia. The following commodities in New South Wales recorded a percentage share of national tourism consumption higher than the New South Wales share of Australia's total tourism consumption:

- Education
- Air transport
- Local area passenger transportation
- Shopping
- Other long distance transport costs
- Taxi fares

The results are displayed in Figure 5 (not to scale).

Figure 5: Tourism generated commodity consumption in New South Wales

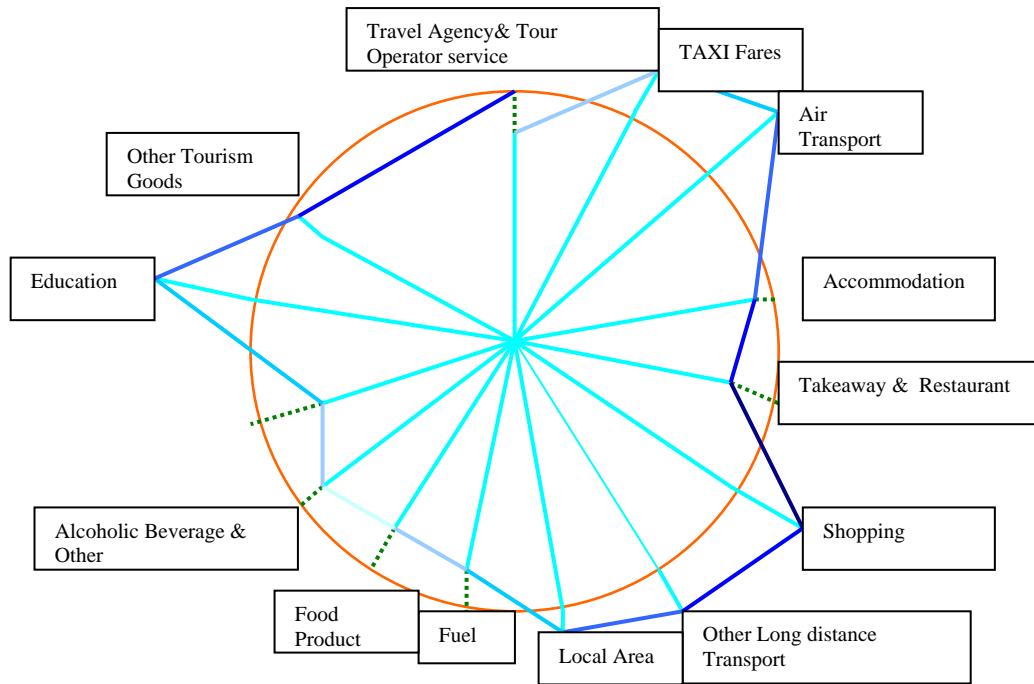


Tourism generated consumption in New South Wales for the following industries was above the national average for tourism in that industry:

- Education
- Air transport
- Local area passenger transportation
- Shopping
- Other long distance transport costs
- Taxi fares

The results are displayed in Figure 6 (not to scale).

Figure 6: Tourism generated industry consumption



Additional tables with information on total tourism consumption in New South Wales by commodity and by origin of travel appear in the Appendices.

Tourism Industry Output by Origin and Industry

Tourism industry output in New South Wales in 2000/01 was \$20,356 billion.

Table 3: Total tourism industry output, 2000/01, New South Wales region, \$m

| | Total NSW | Total NSW industry output (%) | Total Australia | Total Aust. tourism industry output (%) | NSW share of Aust. tourism ind. output (%) |
|--|----------------|-------------------------------|-----------------|---|--|
| Travel agency & tour operator services | 640.584 | 3.147 | 2234 | 3.635 | 28.674 |
| Air and water transport | 3747.278 | 18.409 | 11493 | 18.701 | 32.605 |
| Accommodation | 1953.204 | 9.595 | 6460 | 10.512 | 30.235 |
| Cafes, restaurants and food outlets | 1905.13 | 9.359 | 6301 | 10.253 | 30.235 |
| Clubs, pubs, taverns and bars | 1029.816 | 5.059 | 3406 | 5.542 | 30.235 |
| Other road transport | 430.356 | 2.114 | 1669 | 2.716 | 25.785 |
| Rail transport | 213.101 | 1.047 | 820 | 1.302 | 25.988 |
| Food manufacturing | 1112.823 | 5.467 | 3098 | 5.041 | 35.921 |
| Beverage manufacturing | 517.977 | 2.545 | 1442 | 2.346 | 35.921 |
| Transport equipment manufacturing | 128.679 | 0.632 | 634 | 1.032 | 20.296 |
| Other manufacturing | 939.515 | 4.615 | 4629 | 7.532 | 20.296 |
| Automotive fuel retailing | 125.922 | 0.619 | 327 | 0.532 | 38.508 |
| Other retail trade | 2061.605 | 10.128 | 4760 | 7.746 | 43.311 |
| Education | 557.288 | 2.738 | 1313 | 2.137 | 42.444 |
| Casinos and other gambling services | 102.487 | 0.503 | 280 | 0.456 | 36.603 |
| Libraries, museums and arts | 272.69 | 1.34 | 745 | 1.043 | 36.603 |
| Other entertainment services | 558.922 | 2.746 | 1527 | 2.485 | 36.603 |
| All other industries | 4992.518 | 24.526 | 12869 | 20.941 | 38.795 |
| Total (\$m) | 20355.8 | 100 | 61455 | 100 | 33.123 |

By origin, the contribution of visitors to New South Wales tourism output is:

- Intrastate visitor expenditure 43.2%
- Interstate visitor expenditure 23.8%
- International visitor expenditure 27.7%
- Outbound traveller expenditure 5.3%

By industry sector, the main contributors to New South Wales tourism output are:

- Air and Water Transport 18.4%
- Other retail trade 10.1%
- Accommodation 9.6%
- Cafes, restaurants and food outlets 9.4%
- Food manufacturing 5.5%
- Clubs, pubs, taverns and bars 5.1%

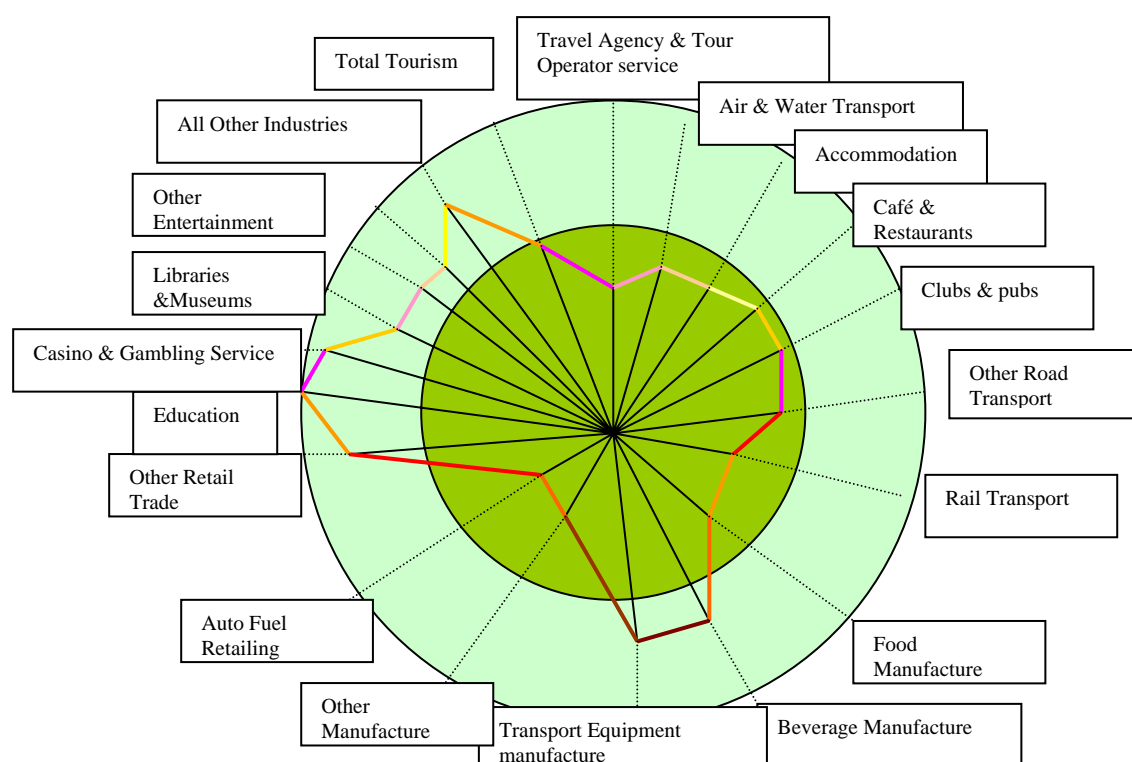
Changes in output patterns vary by origin of the tourist. Air Transport; Accommodation; Other Retail Trade; and Cafes, Restaurants and Food Outlets are the dominant changes in output associated with international visitors. Output changes associated with interstate visitor expenditure are dominated by Air Transport; Accommodation Services; and Cafes, Restaurants and Food Outlets. In contrast, changes in output associated with intrastate visitor expenditure are dominated by Other Retail Trade; Accommodation; and Cafes, Restaurants and Food Outlets. Additional Tables appear in the Appendix.

New South Wales accounted for 33.1% of Australia’s total tourism output. The following industries in New South Wales recorded a percentage share of tourism consumption higher than New South Wales’s average share of all tourism industry output of 33.1%:

- Other retail trade
- Education
- Automotive fuel refining
- Casinos and other gambling services
- Libraries, museums and arts
- Other entertainment services
- Food and beverage manufacturing

The results are displayed in Figure 7 (not to scale).

Figure 7: NSW Industries Record Percentage Share of Tourism Consumption Higher Than NSW Average

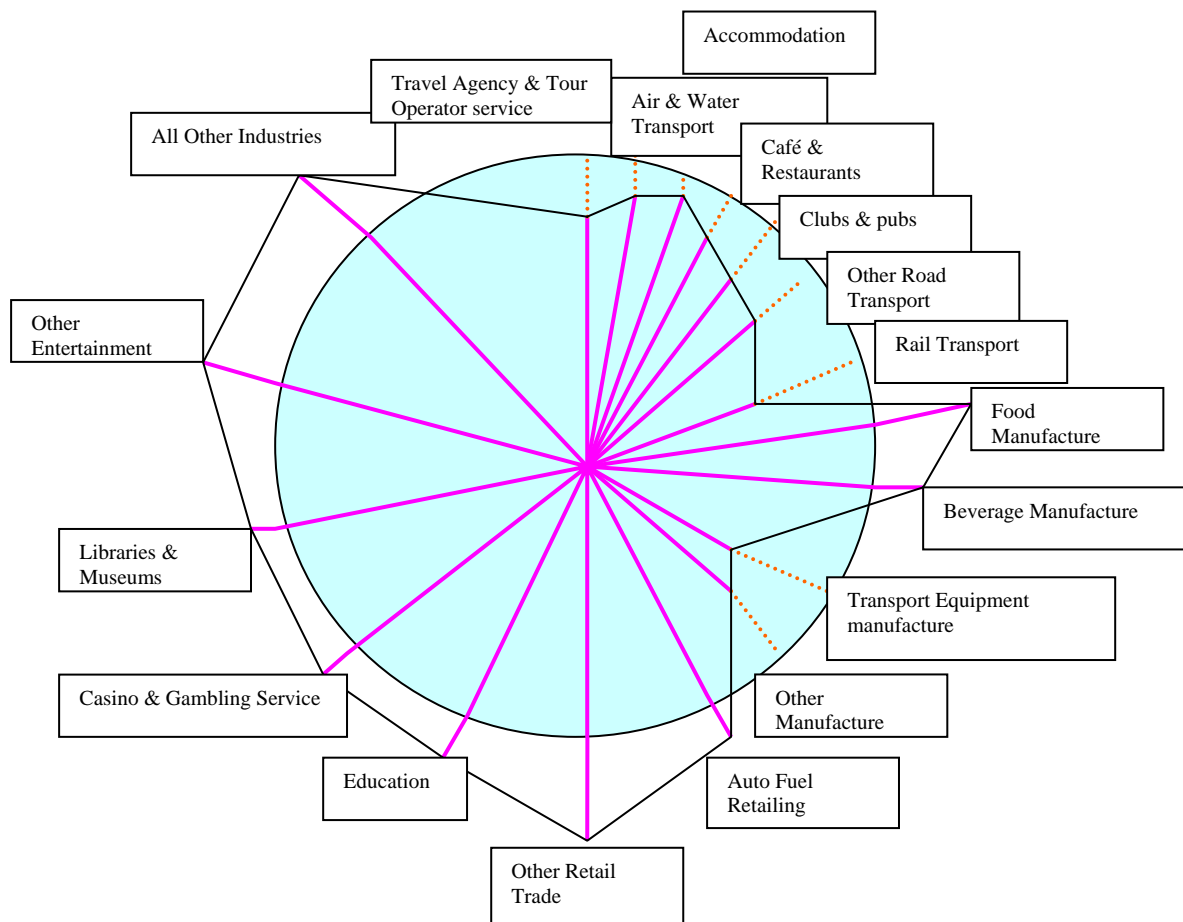


Output of the following industries in the state was above the national average for tourism in that industry:

- Food manufacturing
- Beverage manufacturing
- Automotive fuel retailing
- Other retail trade
- Education
- Casinos and other gambling services
- Libraries, museums and arts
- Other entertainment services
- All other industries

The results are displayed in Figure 8 (not to scale).

Figure 8: NSW Industry Outputs Above National Average for Tourism



Tourism Industry Share of Gross State Product (GSP), New South Wales

Nationally, tourism Gross Domestic Product (GDP) represents the total market value of Australian produced goods and services consumed by visitors after deducting the cost of goods and services used in the process of production.

Tourism Gross State Product (GSP) for New South Wales represents the total market value (i.e. purchasers' value) of New South Wales produced goods and services by all kinds of visitors inbound and outbound, from overseas, New South Wales and the Rest of Australia (RoA), after deducting the costs of goods and services used in the process of their production.

Table 4: Tourism gross state product/GDP and associated statistics, 2000/01

| | New South Wales | Australia |
|---|-----------------|-----------|
| Tourism gross value added at basic prices (\$b) | 8.922 | 26.325 |
| plus Net taxes on tourism products (\$b) | 1.901 | 5.528 |
| equals Tourism GSP/GDP(\$b) | 10.822 | 31.854 |
| Gross value added (\$b) | 216.177 | 611.896 |
| Gross state product/GDP (\$m) | 238.759 | 669.307 |
| Tourism share of gross value added (%) | 4.127 | 4.302 |
| Tourism share of GSP/GDP (%) | 4.533 | 4.759 |
| Share of New South Wales in Australia's tourism gross value added (%) | | 33.891 |
| Share of New South Wales in tourism GDP (%) | | 33.976 |

New South Wales Tourism GSP in 2000/01 is equal to \$10.8 billion, which accounted for 4.5% of total GSP in New South Wales. New South Wales accounted for 34% of tourism GDP in Australia.

New South Wales Tourism GSP, by Origin and Purpose of Travel

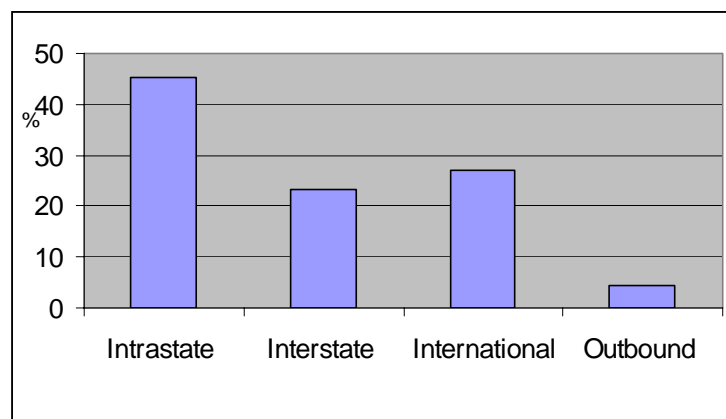
Table 5: New South Wales tourism GSP, by origin and purpose of travel

| | Holiday | VFR | Business | Other | Total (\$m) | Total New South Wales tourism GSP (%) |
|------------------------|----------|----------|----------|----------|-------------|---------------------------------------|
| Intrastate | 2947.727 | 1029.664 | 539.033 | 376.421 | 4892.844 | 45.211 |
| Interstate | 1273.597 | 570.591 | 581.655 | 88.639 | 2514.482 | 23.234 |
| Outbound | | | | | 470.894 | 4.351 |
| Inbound | 1112.706 | 402.649 | 455.253 | 973.516 | 2944.124 | 27.204 |
| Total | 5334.030 | 2002.904 | 1575.941 | 1438.576 | 10822.344 | 100.00 |
| % (excluding outbound) | 51.529 | 19.349 | 15.224 | 13.897 | 100.00 | |

By origin, the share of tourism in New South Wales GSP is:

- Intrastate visitor expenditure 45.2%
- Interstate visitor expenditure 23.2%
- International visitor expenditure 27.2%
- Outbound traveller expenditure 4.4%

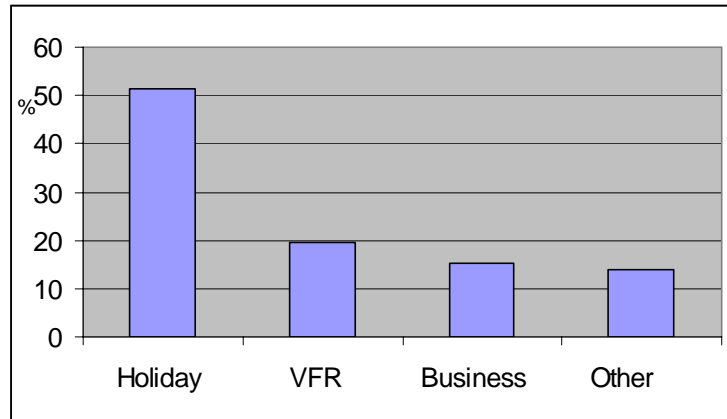
Figure 9: Share of New South Wales Tourism GSP by origin



By purpose of travel, the share of tourism GSP in New South Wales is:

- Holiday 51.5%
- VFR 19.4%
- Business 15.2%
- Other 13.9%

Figure 10: Share of New South Wales Tourism GSP by purpose of visit



Additional Tables with information on Tourism Share of Gross State Product in New South Wales by Origin and Purpose of Travel appear in the Appendix.

Tourism Industry Share of Gross Value Added (GVA), New South Wales

Table 6: New South Wales tourism gross value added, by origin and purpose of travel

| | Holiday | VFR | Business | Other | Total (\$m) | Total NSW tourism GVA (%) |
|------------------------|----------|----------|----------|----------|-------------|---------------------------|
| Intrastate | 2405.803 | 788.202 | 395.082 | 305.507 | 3894.594 | 43.653 |
| Interstate | 1069.401 | 466.609 | 453.526 | 75.888 | 2065.425 | 23.151 |
| Outbound | | | | | 392.221 | 28.800 |
| Inbound | 944.041 | 343.177 | 391.799 | 890.458 | 2569.475 | 4.396 |
| Total | 4419.244 | 1597.988 | 1240.408 | 1271.854 | 8921.714 | 100.00 |
| % (excluding outbound) | 51.811 | 18.735 | 14.543 | 14.911 | 100.00 | |

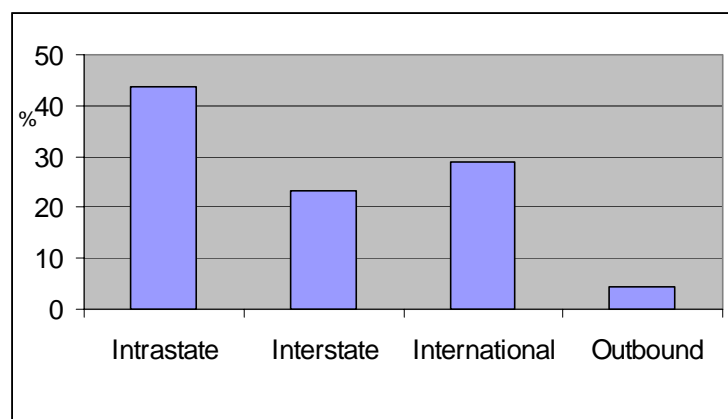
Industry Gross Value Added (GVA) measures the value of production exclusive of product taxes such as the GST. It is the preferred national accounts measure of the production of industries because it is free from distortions in prices caused by changes in tax rates or the introduction of new taxes over time.

The tourism industry share of total industry gross value added in New South Wales for 2000/01 was 4.15% (= \$8.922 billion).

Classified by the origin of the tourists, the share of tourism GVA in New South Wales is:

- Intrastate visitor expenditure 43.7%
- Interstate visitor expenditure 23.2%
- International visitor expenditure 28.8%
- Outbound traveller expenditure 4.4%

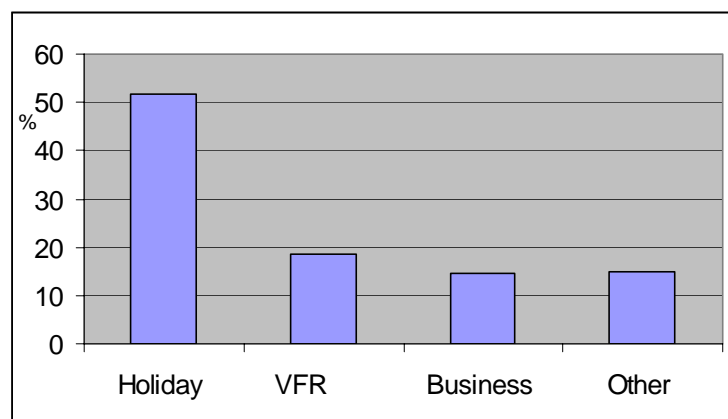
Figure 11: Share of New South Wales Tourism GVA by Origin



Classified by purpose of travel, the share of tourism GVA in New South Wales is:

- Holiday 51.8%
- VFR 18.7%
- Business 14.5%
- Other 14.9%

Figure 12: Share of New South Wales Tourism GVA by purpose of visit



Holiday and Business travel contribute a higher share of value added than they contribute to GSP.

Tourism Gross Value Added by Origin and Industry

By Industry Sector, the main contributors to State Tourism GVA are:

- Air and Water Transport 14.3%
- Other Retail Trade 11.1%
- Accommodation 9.5%
- Cafes, Restaurants and Food Outlets 8.5%
- Education 5.5%
- Ownership of Dwellings 5.3%

Table 7: Tourism gross value added, by selected industries, 2000/01, New South Wales, \$m

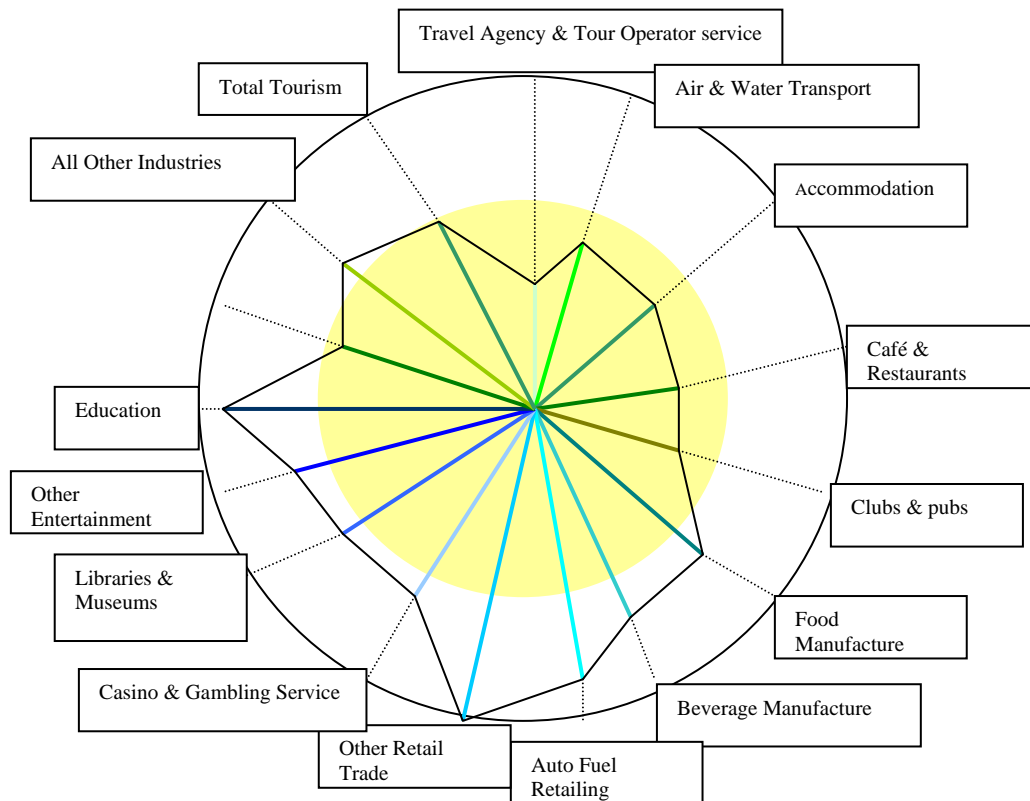
| | NSW total | NSW tourism GVA (%) | Australia | Australian tourism GVA (%) | NSW share of Australian tourism GVA (%) |
|--|-----------------|---------------------|--------------|----------------------------|---|
| Travel agency and tour operator services | 282.155 | 3.163 | 984 | 3.738 | 28.674 |
| Air and water transport | 1275.503 | 14.297 | 3912 | 14.892 | 32.605 |
| Accommodation | 846.288 | 9.486 | 2799 | 10.632 | 30.235 |
| Cafes, restaurants and food outlets | 755.581 | 8.469 | 2499 | 9.493 | 30.235 |
| Clubs, pubs, taverns and bars | 367.36 | 4.118 | 1215 | 4.615 | 30.235 |
| Food manufacturing | 280.541 | 3.144 | 781 | 2.967 | 35.921 |
| Beverage manufacturing | 171.701 | 1.925 | 478 | 1.816 | 35.921 |
| Automotive fuel retailing | 69.315 | 0.777 | 180 | 0.684 | 38.508 |
| Other retail trade | 990.09 | 11.098 | 2286 | 8.684 | 43.311 |
| Casinos and other gambling services | 64.055 | 0.718 | 175 | 0.682 | 36.603 |
| Libraries, museums and arts | 152.999 | 1.715 | 418 | 1.588 | 36.603 |
| Other entertainment services | 268.297 | 3.007 | 733 | 2.784 | 36.603 |
| Education | 494.047 | 5.538 | 1164 | 4.422 | 42.444 |
| Ownership of dwellings | 470.717 | 5.276 | 1611 | 6.119 | 29.219 |
| All other industries | 2433.065 | 27.269 | 7090 | 26.933 | 34.317 |
| Total (\$m) | 8921.714 | 100 | 26325 | 100 | 33.891 |

New South Wales accounted for 33.9% of total tourism GVA in Australia. The following industries in New South Wales recorded a percentage share of tourism GVA higher than the New South Wales share of Australian tourism industry GVA of 33.9%:

- Other Retail Trade
- Education
- Automotive Fuel Retailing
- Casinos and other Gambling Services
- Libraries, Museums and Arts
- Other Entertainment Services
- Food and Beverage Manufacturing

The results are displayed in Figure 13 (not to scale).

Figure 13: NSW Industries % Share of Tourism GVA Higher Than NSW Share of Australian Tourism Industry GVA



Gross value added of the following industries in New South Wales was above the national average for tourism in that industry:

- Food Manufacturing
- Beverage Manufacturing
- Automotive Fuel Retailing
- Other Retail trade
- Casinos and Other gambling services
- Libraries, Museums and Arts
- Other Entertainment Services
- Education

The results are displayed in Figure 14 (not to scale).

Figure 14: NSW Industries GVA Above National Average for Tourism in that Industry

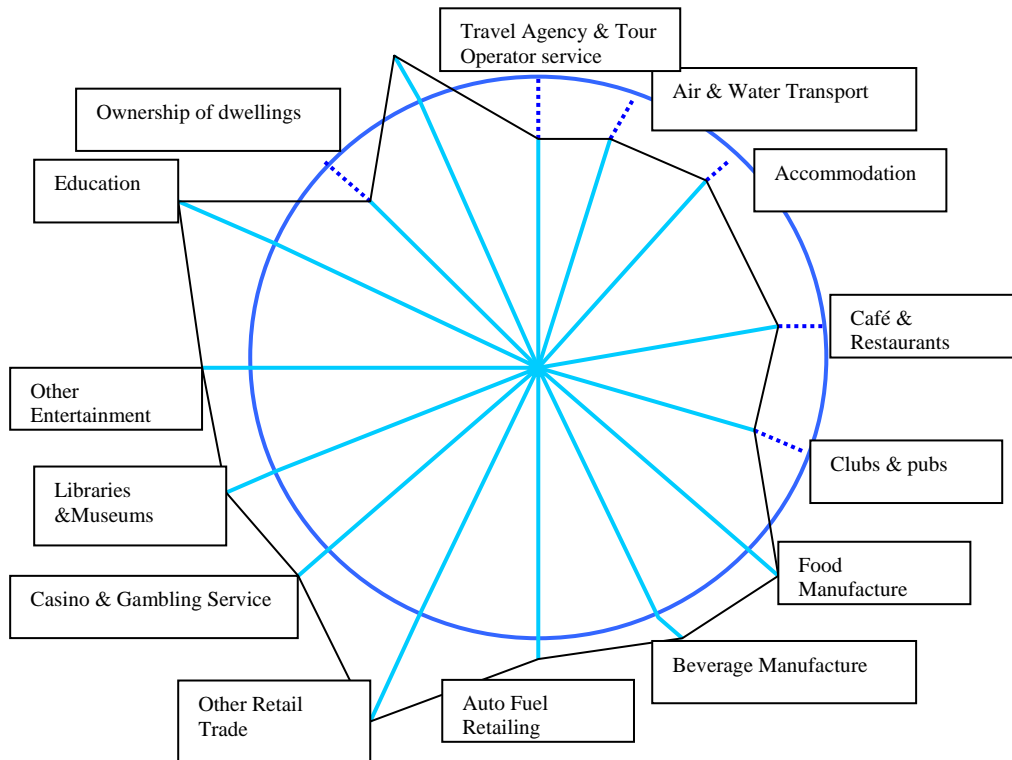
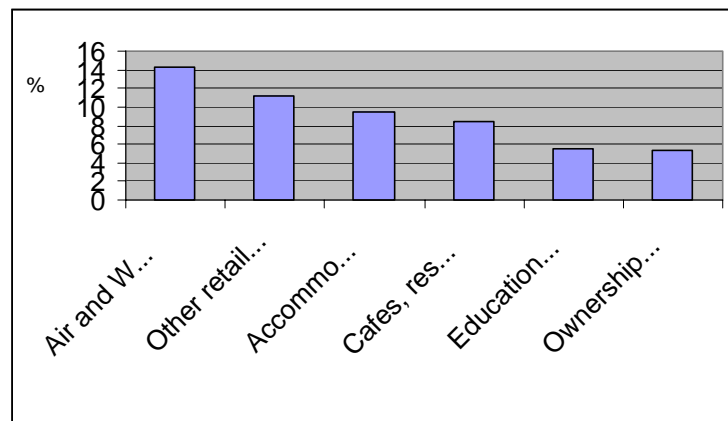


Figure 15: Share of New South Wales Tourism GVA by Industry



Additional Tables with information on Total Tourism Industry Share of Gross Value Added in New South Wales by Industry Sector and by Origin of Travel appear in the Appendices.

Comparison with ‘Non-tourism’ Industries

Tourism contributed \$8.922 billion to industry Gross Value Added in New South Wales in 2000/01. As indicated in the above table, when compared with the traditional eighteen Australian and New Zealand Standard Industrial Classification (ANZSIC) industry divisions, the gross value added of the tourism industry would rank eleventh in New South Wales. Tourism GVA exceeded that of Agriculture, Forestry and Fishing; Mining; Communication services; Personal and Other Services; Electricity, Gas and Water Supply; Accommodation, Cafes and Restaurants; Government Administration and Defence; and Cultural and Recreational Services.

The percentage share of New South Wales tourism GVA in Australia (33.9%) is below the average percentage share of New South Wales GVA in Australia for all industry (35.3%).

Table 8: Gross value added, by industry division, New South Wales and Australia, 2000/01, \$m

| Industry | New South Wales | Australia | Share of New South Wales (%) |
|---------------------------------------|-------------------|---------------|------------------------------|
| Property and business services | 30554.173 | 74779 | 40.859 |
| Manufacturing | 28369.379 | 78266 | 36.247 |
| Ownership of dwellings | 26964.387 | 61117 | 44.119 |
| Finance and insurance | 19704.563 | 43950 | 44.834 |
| Health and community services | 12131.605 | 37466 | 32.380 |
| Construction | 11812.615 | 33543 | 35.216 |
| Wholesale trade | 11623.951 | 31378 | 37.045 |
| Retail trade | 11174.251 | 33915 | 32.948 |
| Transport and storage | 11037.185 | 32484 | 33.977 |
| Education | 9589.875 | 29287 | 32.744 |
| Tourism | 8921.714 | 26325 | 33.891 |
| Government administration and defence | 7167.008 | 24054 | 29.795 |
| Communication services | 6860.812 | 19710 | 34.809 |
| Accommodation, cafes and restaurants | 6252.24 | 16331 | 38.284 |
| Agriculture, forestry and fishing | 5534.225 | 21647 | 25.566 |
| Electricity, gas and water | 4956.139 | 16339 | 30.333 |
| Personal and other services | 4657.269 | 14490 | 32.141 |
| Cultural and recreational services | 4579.43 | 11542 | 39.676 |
| Mining | 3208.312 | 31598 | 10.154 |
| Total | 216177.422 | 611896 | 35.329 |

Tourism Employment by Origin and Industry

In 2000/01, tourism directly contributed 185,144 jobs comprising 6.1 % of total New South Wales employment. This is higher than tourism's share of employment in the Australian economy as a whole (6.0%). The share of New South Wales in total tourism employment in Australia is (33.7%).

Table 9: Tourism employed persons, by selected industry and type of visitor, NSW, 2000/01, '000

| Tourism industries | New South Wales Total '000 | NSW total tourism employment (%) | Aust. Total '000 | Aust. total tourism employment (%) | NSW % share of Aust. Tourism employment |
|--|----------------------------|----------------------------------|------------------|------------------------------------|---|
| Tourism characteristic industries | | | | | |
| Travel agency and tour operator services | 7.007 | 3.8 | 23.7 | 4.3 | 29.6 |
| Road transport and motor vehicle hiring | 5.980 | 3.2 | 23.3 | 4.2 | 25.7 |
| Air and water transport | 12.103 | 6.5 | 36 | 6.6 | 33.6 |
| Accommodation | 26.743 | 14.4 | 99 | 18.0 | 27.0 |
| Cafes, restaurants and food outlets | 13.750 | 7.4 | 50.9 | 9.3 | 27.0 |
| Clubs, pubs, taverns and bars | 7.429 | 4.0 | 27.5 | 5.0 | 27.0 |
| Total tourism characteristic industries | 73.011 | 39.4 | 260.4 | 47.4 | 28.0 |
| Tourism connected industries | | | | | |
| Rail transport | 0.991 | 0.5 | 3.7 | 0.7 | 26.8 |
| Manufacturing | 8.950 | 4.8 | 38.8 | 7.1 | 23.1 |
| Retail trade | 60.942 | 32.9 | 143.6 | 26.1 | 42.4 |
| Casinos and other gambling services | 0.673 | 0.4 | 2.6 | 0.5 | 25.9 |
| Libraries, museums and arts | 3.218 | 1.7 | 11 | 2.0 | 29.3 |
| Other entertainment services | 4.505 | 2.4 | 15.4 | 2.8 | 29.3 |
| Education | 7.844 | 4.2 | 18.8 | 3.4 | 41.7 |

| | | | | | |
|--|----------|-------|-------|------|------|
| Total tourism connected industries | 87.123 | 47.1 | 233.9 | 42.6 | 37.2 |
| All other industries | 25.009 | 13.5 | 55.3 | 13.0 | 45.2 |
| Total industry tourism employment ('000) | 185.144 | 100.0 | 549.6 | 100 | 33.7 |
| Total employed person ('000) | 3044.317 | | 9123 | | |
| Share of tourism in NSW employment (%) | 6.082 | | 6.024 | | |

Contribution to employment in New South Wales by origin of visitor is:

- Intrastate visitors 48.6%
- Interstate visitors 21.8%
- International visitors 26.4%
- Outbound Travellers 3.2%

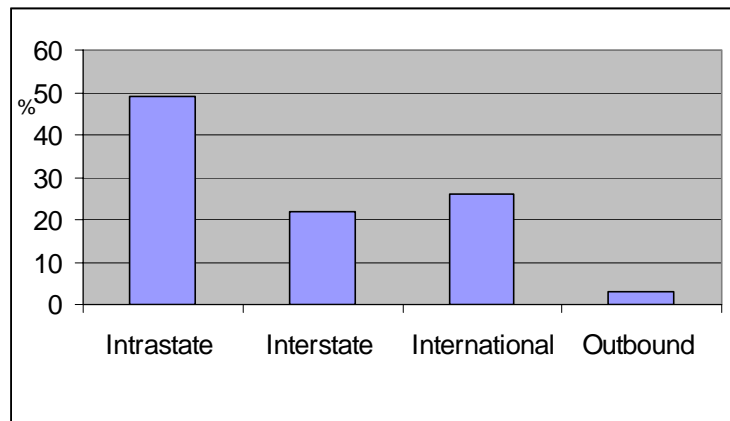
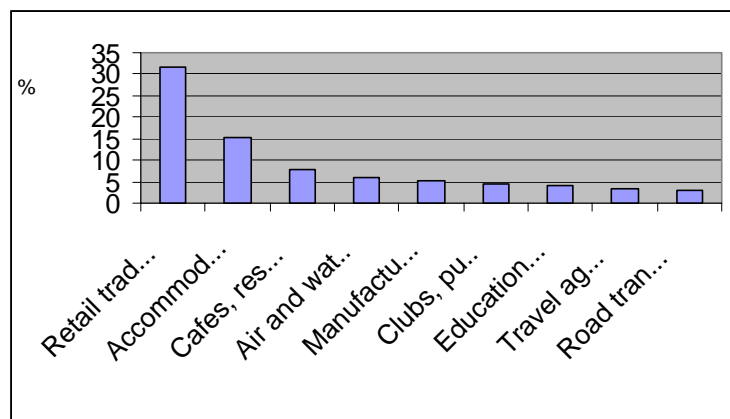


Figure 16: Share of New South Wales tourism employment by origin

Retail Trade generated the most tourism employment, followed by Accommodation, and Cafes, Restaurants and Food Outlets. These industries account for more than half of the employment generated by tourism. The major tourism industry sectors contributing to total State tourism employment are:

- Retail Trade 32.9%
- Accommodation 14.4%
- Cafes, Restaurants and Food Outlets 7.4%
- Air and Water Transport 6.5%
- Manufacturing 4.8%
- Education 4.2%
- Clubs, Pubs and Taverns 4.0%
- Travel Agency and Tour Operator Services 3.8%
- Road Transport and Motor Vehicle Hiring 3.2%

Figure 17: Industry contribution to New South Wales tourism employment

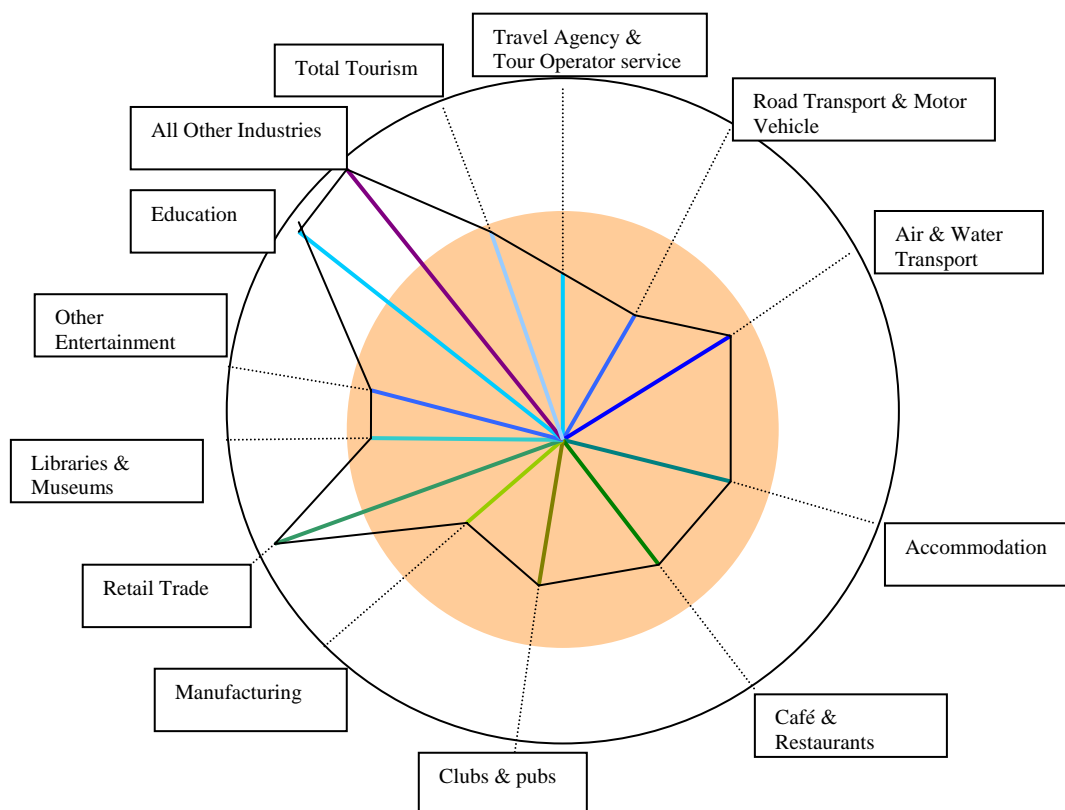


Industry sectors in New South Wales with percentage shares of employment above the average share of New South Wales in total Australian tourism employment (33.7%) are as follows:

- Retail trade
- Education

The results are displayed in Figure 18 (not to scale).

Figure 18: Industry Sectors % Shares of Employment Above Average Share of NSW Total Australian Tourism Employment

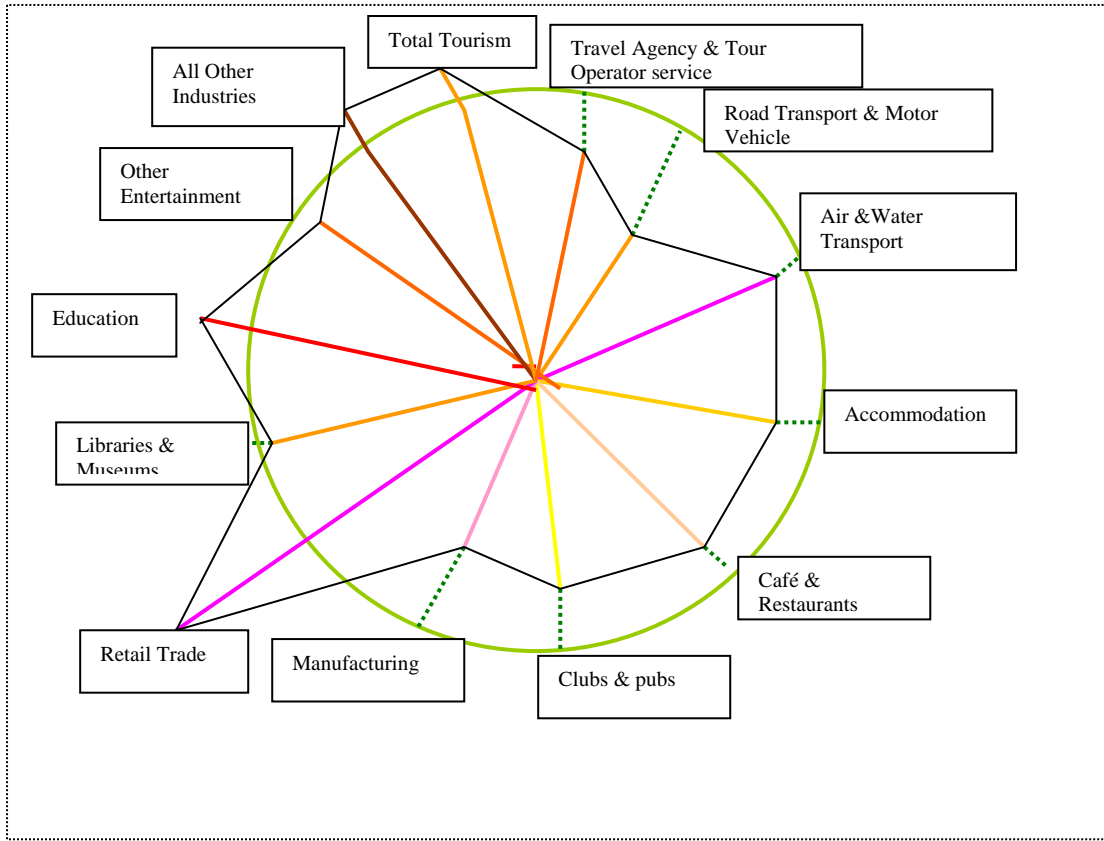


The proportion of tourism employment in the following industries in New South Wales was above the national average for tourism employment in that industry:

- Retail trade
- Education

The results are displayed in Figure 19 (not to scale).

Figure 19: Proportion of Tourism Employment in NSW Industries Above National Average



Since direct tourism expenditure supports 185,144 jobs this implies that one job is directly maintained/created for every \$125,800 injected by tourism into the State. Taking indirect employment effects into account (see below), one job is maintained/created in the State for every \$94,700 tourist consumption.

Every 1,000 international visitors generates, on average, 17.6 jobs (48,878 jobs from international tourism; 2,771,000 overseas visitors; 2000/2001 figures).

Every 1,000 visitors to New South Wales from the other states and territories of Australia (RoA) generates, on average, 4.9 jobs (40,361 jobs from interstate tourism from RoA; 8,286,000 interstate visitors; 2000/2001 figures).

Chapter 4

Indirect Contribution of Tourism in New South Wales

Tourism's total worth is greater than the direct contribution estimated in the Tourism Satellite Account (TSA). The TSA does not include tourism's indirect contribution. The indirect contribution is “the gross value added, GDP and employment that are attributable to industries which provide inputs to produce tourism output of industries characterised as Tourism industries in the satellite account” (Salma 2002). The BTR provides the example of value added associated with the production of crude oil that is subsequently used in petroleum manufacturing and then used in transport of a tourist. In the Australian National Accounts and other ABS industry statistics this value added would be recorded against the Mining and Manufacturing industries, whereas it is really an indirect effect of tourism expenditure.

Direct effects occur when the visitor makes purchases from suppliers of goods and services within the region. Such purchases may cover a variety of items such as accommodation, transport, food and beverage, shopping, touring, entertainment etc. Indirect effects occur when firms that sell goods and services to visitors purchase inputs from other firms and these other firms (suppliers) purchase inputs from other firms (suppliers). For example, hotels and restaurants purchase carpets, linen, pool chemicals, computers from suppliers that purchase fuel, stationery, power, furnishings etc. from other firms that purchase from other firms and so on. Almost every industry in the economy is affected to some extent by the indirect effects of the initial tourist expenditure. We hold the same view as the BTR that “Indirect effects should be understood as a method of redistributing value added, GDP, and employment that occurs outside the Tourism sector to the Tourism sector. They reflect the value of production and employment that occurs on an economy wide basis as a result of the demand by tourists for goods and services” (Salma2002).

Tourism's worth is much greater when the indirect contribution is taken into account. BTR comparisons of the direct and indirect estimates between 1997-98 and 2000/01 indicates that the indirect contribution of tourism has been slightly higher than the direct contribution in terms of gross value added (GVA), thus more than doubling the contribution of tourism reported in the TSA (Salma 2002)

In this section, we employ the M2RNew South Wales Input-Output Tourism Model to estimate the indirect effects of tourism on the economy of New South Wales. The expenditure inputs correspond to the aggregate consumption estimates for New South Wales as shown in Table 2.

- Inbound Tourism: an increase of \$6.365 billion in inbound tourism in New South Wales.
- Intrastate Tourism: an increase of \$10.320 billion in intrastate tourism in New South Wales.
- Interstate Tourism: an increase of \$5.398 billion in interstate tourism in New South Wales.
- Outbound Tourism: an increase of \$1.210 billion in inbound tourism in New South Wales.

These consumption expenditures, which generate the ‘direct effects’ discussed above, effectively act as ‘shocks’ to the economic system to produce the indirect effects.

Table 10: Total effect (direct and indirect) of tourism to New South Wales

| | Direct Effect | Indirect Effect | Total Effect |
|--------------------------|----------------------|------------------------|---------------------|
| Real Output (\$ billion) | 23.293 | 35.609 | 58.802 |
| Real GSP (\$ billion) | 10.822 | 10.068 | 20.890 |
| Employment (jobs) | 185,144 | 60,916 | 246,060 |

Assumptions: all final demand components are exogenously determined; labour, capital and land are endogenous.

Tourism’s contribution to the New South Wales economy is much greater when the indirect contribution is taken into account.

For Real Output, the indirect effect is 52% greater than the direct effects. Total real output allowing for both the direct and indirect effects of tourism expenditure in the State is \$ 58.8 billion.

For Real GSP, the indirect effects are less than the direct effects. This is consistent with BTR estimates that indicate that indirect tourism GDP accounts for a lower share of national GDP compared to direct tourism GDP (Salma 2002). Addition of the indirect effects to the direct effects implies that the contribution of tourism to New South Wales GSP is \$ 20.890 billion, or 8.75% of total New South Wales GSP.

Indirectly created tourism employment was 60,916 in 2000/01, giving total (direct plus indirect) employment of 246,060. In other words, just under one quarter of a million jobs in New South Wales are tourism related. This equates to 8.083% of total New South Wales employment. This compares with employment in Victoria’s tourism industry of 6.2% of total state employment. (Access Economics 2003).

Taking indirect employment effects into account one job is maintained/created in New South Wales for every \$94,700 of tourist consumption.

Details of the direct, indirect and total effects of tourism expenditure in New South Wales by origin market are set out below.

Table 11: Total effect (direct and indirect) of tourism to New South Wales by origin, 2000/01, \$m

| | Direct effect | Indirect effect | Total effect |
|------------------------------|----------------------|------------------------|---------------------|
| INTRASTATE | | | |
| Real Output (billion) | 10.320 | 15.649 | 25.969 |
| Real GSP/GDP (billion) | 4.893 | 4.523 | 9.416 (3.944%) |
| Employment (number of jobs) | 90,069 | 19,778 | 109847 (3.608%) |
| INTERSTATE | | | |
| Real Output (billion) | 5.398 | 8.145 | 13.543 |
| Real GSP/GDP (billion) | 2.514 | 2.233 | 4.747 (1.988%) |
| Employment (number of jobs) | 40,339 | 14,065 | 54404 (1.787%) |
| INBOUND | | | |
| Real Output (billion) | 6.365 | 9.710 | 16.075 |
| Real GSP/GDP (billion) | 2.944 | 2.641 | 5.585 (2.339%) |
| Employment (number of jobs) | 48,886 | 21,443 | 70329 (2.310%) |
| OUTBOUND | | | |
| Real Output (billion) | 1.210 | 2.005 | 3.215 |
| Real GSP/GDP (billion) | 0.471 | 0.672 | 1.143 (0.479%) |
| Employment (number of jobs) | 5,850 | 5,630 | 11480 (0.377%) |
| TOTAL | | | |
| Real Output (billion) | 23.293 | 35.509 | 58.802 |
| Real GSP/GDP (billion) | 10.822 | 10.068 | 20.890 (8.750%) |
| Employment (number of jobs) | 185,144 | 60,916 | 246060 (8.083%) |

Assumptions: all final demand components are exogenously determined; labour, capital and land are endogenous.

Every 1,000 international visitors generates, on average, 25.3 jobs (70,329 jobs from international tourism; 2,771,000 overseas visitors; 2000/2001 figures).

Every 1,000 visitors to New South Wales from the other states and territories of Australia (RoA) generates, on average, 6.6 jobs (54,404 jobs from interstate tourism from RoA; 8,286,000 interstate visitors; 2000/2001 figures).

APPENDIX A: LIST OF TABLES

TOURISM INDUSTRY CONSUMPTION

Tourism consumption by origin & commodity, selected tourism products, type of visitor, NSW, 2000/01,
\$m

| COMMODITIES | Intrastate | Interstate | Inbound | Outbound | New South Wales Total | % of NSW Tourism Consumption | Australia | NSW share of total Australia (%) |
|--|----------------|---------------|-----------------|---------------|-----------------------|------------------------------|----------------|----------------------------------|
| Travel agency and tour operator services | 302.6 | 204.4 | 122.963 | 84.7 | 714.663 | 3.068 | 2271.099 | 31.468 |
| Taxi fares | 81.7 | 56.7 | 39.476 | 11.5 | 189.376 | 0.813 | 576.948 | 32.824 |
| Air transport | 316.9 | 1061.5 | 1675.917 | 879.5 | 3933.817 | 16.888 | 11203.243 | 35.113 |
| Accommodation services | 632.1 | 619 | 828.233 | 32.6 | 2111.933 | 9.067 | 6535.102 | 32.317 |
| Takeaway and restaurant meals | 1950.8 | 849.4 | 452.682 | 12.1 | 3264.982 | 14.017 | 10366.908 | 31.494 |
| Shopping (including gifts & souvenirs) | 2098.4 | 593.1 | 856.931 | 118.1 | 3666.531 | 15.741 | 11103.877 | 33.020 |
| Other long distance transport costs | 178.9 | 105.5 | 258.798 | 0 | 543.198 | 2.332 | 1616.594 | 33.601 |
| Local area passenger transportation | 32.6 | 12.2 | 70.773 | 8.9 | 124.473 | 0.534 | 365.103 | 34.093 |
| Fuel (petrol, diesel) | 1289.5 | 423.6 | 78.524 | 0 | 1791.624 | 7.692 | 5585.001 | 32.079 |
| Food products | 943.4 | 389.5 | 413.368 | 17.8 | 1764.068 | 7.573 | 5565.105 | 31.699 |
| Alcoholic beverages & other beverages | 560 | 257.3 | 199.944 | 21 | 1038.244 | 4.457 | 3305.009 | 31.414 |
| Recreational, cultural & sports services | 454.8 | 186.5 | 135.948 | 0 | 777.248 | 3.337 | 2500.999 | 31.078 |
| Education | 36 | 9.6 | 511.714 | 0 | 557.314 | 2.393 | 1416 | 39.358 |
| Other tourism goods and services | 1442.2 | 629.8 | 719.873 | 24.1 | 2815.973 | 12.088 | 8842.912 | 31.844 |
| Total expenditure, \$m | 10319.9 | 5398.1 | 6365.144 | 1210.3 | 23293.44 | 100 | 71253.9 | 32.691 |

TOURISM INDUSTRY GSP, BY TYPE OF VISITOR, NEW SOUTH WALES, 2000/01

Tourism industry GSP, by type of visitor, New South Wales, 2000/01

| Domestic | | | | | |
|---|------------|----------|----------|---------|----------|
| | Holiday | VFR | Business | Other | Total |
| Intrastate | 2947.727 | 1029.664 | 539.033 | 376.421 | 4892.844 |
| Interstate | 1273.597 | 570.591 | 581.655 | 88.639 | 2514.482 |
| | Households | Business | Total | | |
| Outbound | 344.727 | 126.166 | 470.894 | | |
| International | | | | | |
| | Holiday | VFR | Business | Other | Total |
| Inbound | 1112.706 | 402.649 | 455.253 | 973.516 | 2944.124 |
| Total Tourism GSP (\$m) 10,822,344 | | | | | |

Percentage share of tourism industry GSP, New South Wales

| Domestic | | | | | |
|----------------------------------|------------|----------|----------|-------|--------|
| | Holiday | VFR | Business | Other | Total |
| Intrastate | 27.237 | 9.514 | 4.981 | 3.478 | 45.211 |
| Interstate | 11.768 | 5.272 | 5.375 | 0.819 | 23.234 |
| | Households | Business | Total | | |
| Outbound | 3.185 | 1.166 | 4.351 | | |
| International | | | | | |
| | Holiday | VFR | Business | Other | Total |
| Inbound | 10.282 | 3.721 | 4.207 | 8.995 | 27.204 |
| Total Tourism GSP (%) 100 | | | | | |

Tourism Industry Share Of GSP, New South Wales

| Domestic | | | | | |
|------------------------------------|------------|----------|----------|-------|-------|
| | Holiday | VFR | Business | Other | Total |
| Intrastate | 1.235 | 0.431 | 0.226 | 0.158 | 2.049 |
| Interstate | 0.533 | 0.239 | 0.244 | 0.037 | 1.053 |
| | Households | Business | Total | | |
| Outbound | 0.144 | 0.053 | 0.197 | | |
| International | | | | | |
| | Holiday | VFR | Business | Other | Total |
| Inbound | 0.466 | 0.169 | 0.191 | 0.408 | 1.233 |
| Total Tourism GSP (%) 4.533 | | | | | |

TOURISM INDUSTRY OUTPUT AT BASIC PRICES, 2000/01, NEW SOUTH WALES

Total Tourism industry output, 2000/01, New South Wales region, \$m

| | Intrastate | Interstate | Inbound | Outbound | Total New South Wales | Australia | Percentage share of New South Wales |
|--|------------|------------|----------|----------|-----------------------|-----------|-------------------------------------|
| Tourism characteristic industries | | | | | | | |
| Travel agency and tour operator services | 275.113 | 176.666 | 111.785 | 77.02 | 640.584 | 2234 | 28.674 |
| Taxi transport | 45.423 | 29.02 | 64.04 | 4.625 | 143.108 | 555 | 25.785 |
| Air and water transport | 292.264 | 1127.035 | 1528.455 | 799.524 | 3747.278 | 11493 | 32.605 |
| Motor vehicle hiring | 128.064 | 46.515 | 14.19 | 0 | 188.769 | 862 | 21.899 |
| Accommodation | 938.269 | 533.406 | 465.298 | 16.231 | 1953.204 | 6460 | 30.235 |
| Cafes, restaurants and food outlets | 915.175 | 520.277 | 453.845 | 15.832 | 1905.13 | 6301 | 30.235 |
| Total tourism characteristic industries | 2594.307 | 2432.919 | 2637.613 | 913.233 | 8578.073 | 27905 | 30.740 |
| Tourism connected industries | | | | | | | |
| Clubs, pubs, taverns and bars | 494.697 | 281.235 | 245.326 | 8.558 | 1029.816 | 3406 | 30.235 |
| Other road transport | 136.596 | 87.269 | 192.582 | 13.909 | 430.356 | 1669 | 25.785 |
| Rail transport | 80.372 | 58.747 | 73.982 | 0 | 213.101 | 820 | 25.988 |
| Food manufacturing | 634.46 | 239.688 | 224.394 | 14.281 | 1112.823 | 3098 | 35.921 |
| Beverage manufacturing | 295.317 | 111.566 | 104.447 | 6.647 | 517.977 | 1442 | 35.921 |
| Transport equipment manufacturing | 78.022 | 18.53 | 28.378 | 3.749 | 128.679 | 634 | 20.296 |
| Other manufacturing | 569.657 | 135.289 | 207.197 | 27.373 | 939.515 | 4629 | 20.296 |
| Automotive fuel retailing | 95.987 | 24.724 | 5.211 | 0 | 125.922 | 327 | 38.508 |
| Other retail trade | 1176.843 | 377.497 | 458.032 | 49.233 | 2061.605 | 4760 | 43.311 |
| Casinos and other gambling services | 58.422 | 23.968 | 20.098 | 0 | 102.487 | 280 | 36.603 |
| Libraries, museums and arts | 155.444 | 63.771 | 53.475 | 0 | 272.69 | 745 | 36.603 |
| Other entertainment services | 318.607 | 130.71 | 109.605 | 0 | 558.922 | 1527 | 36.603 |
| Education | 35.954 | 9.621 | 511.714 | 0 | 557.288 | 1313 | 42.444 |
| Ownership of dwellings | 250.538 | 185.93 | 106.712 | 0 | 543.18 | 1859 | 29.219 |
| Total tourism connected industries | 4380.915 | 1748.544 | 2341.152 | 123.751 | 8594.362 | 26511 | 32.418 |
| All other industries | 1819.887 | 660.12 | 661.005 | 42.349 | 3183.362 | 7039 | 45.225 |
| Total (\$m) | 8795.109 | 4841.584 | 5639.769 | 1079.334 | 20355.796 | 61455 | 33.123 |
| % | 43.207 | 23.785 | 27.706 | 5.302 | 100 | | |

TOURISM INDUSTRY GROSS VALUE ADDED, 2000/01, NEW SOUTH WALES

Total tourism industry gross value added, 2000/01, New South Wales region, \$m

| | Intrastate | Interstate | Inbound | Outbound | NSW | Australia | Percentage share of NSW |
|--|------------|------------|----------|----------|----------|-----------|-------------------------|
| Tourism characteristic industries | | | | | | | |
| Travel agency and tour operator services | 121.178 | 77.815 | 49.237 | 33.925 | 282.155 | 984 | 28.674 |
| Taxi transport | 17.76 | 11.346 | 25.039 | 1.808 | 55.954 | 217 | 25.785 |
| Air and water transport | 99.481 | 383.622 | 520.257 | 272.143 | 1275.503 | 3912 | 32.605 |
| Motor vehicle hiring | 41.45 | 15.055 | 4.593 | 0 | 61.098 | 279 | 21.899 |
| Accommodation | 406.535 | 231.115 | 201.605 | 7.033 | 846.288 | 2799 | 30.235 |
| Cafes, restaurants and food outlets | 362.962 | 206.344 | 179.997 | 6.279 | 755.581 | 2499 | 30.235 |
| Total tourism characteristic industries | 1049.365 | 925.298 | 980.728 | 321.188 | 3276.579 | 10690 | 30.651 |
| Tourism connected industries | | | | | | | |
| Clubs, pubs, taverns and bars | 176.47 | 100.323 | 87.513 | 3.053 | 367.36 | 1215 | 30.235 |
| Other road transport | 58.845 | 37.595 | 82.964 | 5.992 | 185.396 | 719 | 25.785 |
| Rail transport | 42.93 | 31.38 | 39.517 | 0 | 113.827 | 438 | 25.988 |
| Food manufacturing | 159.946 | 60.425 | 56.569 | 3.6 | 280.541 | 781 | 35.921 |
| Beverage manufacturing | 97.893 | 36.982 | 34.622 | 2.204 | 171.701 | 478 | 35.921 |
| Transport equipment manufacturing | 27.32 | 6.488 | 9.937 | 1.313 | 45.058 | 222 | 20.296 |
| Other manufacturing | 191.363 | 45.447 | 69.603 | 9.195 | 315.607 | 1555 | 20.296 |
| Automotive fuel retailing | 52.837 | 13.61 | 2.869 | 0 | 69.315 | 180 | 38.508 |
| Other retail trade | 565.181 | 181.294 | 219.971 | 23.644 | 990.09 | 2286 | 43.311 |
| Casinos and other gambling services | 36.514 | 14.98 | 12.561 | 0 | 64.055 | 175 | 36.603 |
| Libraries, museums and arts | 87.215 | 35.78 | 30.003 | 0 | 152.999 | 418 | 36.603 |
| Other entertainment services | 152.94 | 62.744 | 52.613 | 0 | 268.297 | 733 | 36.603 |
| Education | 31.874 | 8.529 | 453.644 | 0 | 494.047 | 1164 | 42.444 |
| Ownership of dwellings | 217.115 | 161.126 | 92.476 | 0 | 470.717 | 1611 | 29.219 |
| Total tourism connected industries | 1898.443 | 796.703 | 1244.863 | 49.001 | 3989.009 | 11793 | 33.825 |
| All other industries | 946.786 | 343.424 | 343.884 | 22.032 | 1656.126 | 3662 | 45.225 |
| Total (\$m) | 3894.594 | 2065.425 | 2569.475 | 392.221 | 8921.714 | 26325 | 33.891 |
| % | 43.653 | 23.151 | 28.8 | 4.396 | 100 | | |

Total tourism industry gross value added, 2000/01, New South Wales region, %

| | Intrastate | Interstate | Inbound | Outbound | Total |
|--|---------------|---------------|---------------|---------------|---------------|
| Tourism characteristic industries | | | | | |
| Travel agency and tour operator services | 3.111 | 3.768 | 1.916 | 8.649 | 3.163 |
| Taxi transport | 0.456 | 0.549 | 0.974 | 0.461 | 0.627 |
| Air and water transport | 2.554 | 18.574 | 20.248 | 69.385 | 14.297 |
| Motor vehicle hiring | 1.064 | 0.729 | 0.179 | 0.000 | 0.685 |
| Accommodation | 10.438 | 11.190 | 7.846 | 1.793 | 9.486 |
| Cafes, restaurants and food outlets | 9.320 | 9.990 | 7.005 | 1.601 | 8.469 |
| Total tourism characteristic industries | 26.944 | 44.799 | 38.168 | 81.890 | 36.726 |
| Tourism connected industries | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 |
| Clubs, pubs, taverns and bars | 4.531 | 4.857 | 3.406 | 0.778 | 4.118 |
| Other road transport | 1.511 | 1.820 | 3.229 | 1.528 | 2.078 |
| Rail transport | 1.102 | 1.519 | 1.538 | 0.000 | 1.276 |
| Food manufacturing | 4.107 | 2.926 | 2.202 | 0.918 | 3.144 |
| Beverage manufacturing | 2.514 | 1.791 | 1.347 | 0.562 | 1.925 |
| Transport equipment manufacturing | 0.701 | 0.314 | 0.387 | 0.335 | 0.505 |

NEW SOUTH WALES TOURISM SATELLITE ACCOUNT

| | | | | | |
|-------------------------------------|---------------|--------------|--------------|--------------|---------------|
| Other manufacturing | 4.914 | 2.200 | 2.709 | 2.344 | 3.538 |
| Automotive fuel retailing | 1.357 | 0.659 | 0.112 | 0.000 | 0.777 |
| Other retail trade | 14.512 | 8.778 | 8.561 | 6.028 | 11.098 |
| Casinos and other gambling services | 0.938 | 0.725 | 0.489 | 0.000 | 0.718 |
| Libraries, museums and arts | 2.239 | 1.732 | 1.168 | 0.000 | 1.715 |
| Other entertainment services | 3.927 | 3.038 | 2.048 | 0.000 | 3.007 |
| Education | 0.818 | 0.413 | 17.655 | 0.000 | 5.538 |
| Ownership of dwellings | 5.575 | 7.801 | 3.599 | 0.000 | 5.276 |
| Total tourism connected industries | 48.746 | 38.573 | 48.448 | 12.493 | 44.711 |
| All other industries | 24.310 | 16.627 | 13.383 | 5.617 | 18.563 |
| Total (%) | 100.000 | 100.000 | 100.000 | 100.000 | 100.000 |

Gross value added, by industry division, New South Wales and Australia, 2000/01, \$m

| Industry | New South Wales | Australia | Percentage share of NSW |
|--|------------------------|------------------|--------------------------------|
| Agriculture, forestry and fishing | 5534.225 | 21647 | 25.566 |
| Mining | 3208.312 | 31598 | 10.154 |
| Manufacturing | 28369.379 | 78266 | 36.247 |
| Electricity, gas and water | 4956.139 | 16339 | 30.333 |
| Construction | 11812.615 | 33543 | 35.216 |
| Wholesale trade | 11623.951 | 31378 | 37.045 |
| Retail trade | 11174.251 | 33915 | 32.948 |
| Accommodation, cafes and restaurants | 6252.24 | 16331 | 38.284 |
| Transport and storage | 11037.185 | 32484 | 33.977 |
| Communication services | 6860.812 | 19710 | 34.809 |
| Finance and insurance | 19704.563 | 43950 | 44.834 |
| Property and business services | 30554.173 | 74779 | 40.859 |
| Government administration and defence | 7167.008 | 24054 | 29.795 |
| Education | 9589.875 | 29287 | 32.744 |
| Health and community services | 12131.605 | 37466 | 32.380 |
| Cultural and recreational services | 4579.43 | 11542 | 39.676 |
| Personal and other services | 4657.269 | 14490 | 32.141 |
| Ownership of dwellings | 26964.387 | 61117 | 44.119 |
| Total gross value added at basic prices | 216177.422 | 611896 | 35.329 |
| of which Tourism | 8921.714 | 26325 | |
| % | 4.127 | 4.302 | |

Source: Australian System of National Accounts, 2000/01 (Cat. no. 5204.0).

TOURISM CONSUMPTION, BY TYPE OF VISITOR, NEW SOUTH WALES, 2000/01

Domestic tourism consumption, by purpose of visit, New South Wales, 2000/01

| Commodities | Holiday | Vfr | Business | Other | NSW | Australia | % share of NSW |
|--|----------------|------------|-----------------|--------------|------------|------------------|-----------------------|
| Travel agency and tour operator services | 303.8 | 25.9 | 164.9 | 12.5 | 507 | 1705.4 | 29.729 |
| Taxi fares | 24.7 | 17.5 | 90.6 | 5.7 | 138.5 | 437.9 | 31.628 |
| Air transport | 398.8 | 250.3 | 682.6 | 46.7 | 1378.4 | 4517.1 | 30.515 |
| Motor vehicle hire and lease | 69.3 | 30.2 | 111.7 | 4.4 | 215.7 | 702 | 30.726 |
| Accommodation services | 571.8 | 103.4 | 548.8 | 27.2 | 1251.1 | 4243.5 | 29.483 |
| Takeaway and restaurant meals | 1732.3 | 762.5 | 179.2 | 126.2 | 2800.2 | 9128.5 | 30.675 |
| Shopping (including gifts and souvenirs) | 1788 | 744.4 | 7.5 | 151.6 | 2691.6 | 8439 | 31.895 |
| Other long distance transport costs | 63.6 | 51.3 | 164.8 | 4.7 | 284.4 | 888.9 | 31.995 |
| Local area passenger transportation | 27 | 12.6 | 2.4 | 2.8 | 44.8 | 144.3 | 31.046 |
| Repair and maintenance of motor vehicles | 74.7 | 29.5 | 11.4 | 21.4 | 137 | 450 | 30.444 |
| Fuel (petrol, diesel) | 749.5 | 453.7 | 404.9 | 104.9 | 1713.1 | 5366 | 31.925 |
| Food products | 901.2 | 342.8 | 17.4 | 71.6 | 1332.9 | 4417.7 | 30.172 |
| Alcoholic beverages and other beverages | 503.7 | 279.4 | 16.5 | 17.8 | 817.3 | 2719.8 | 30.050 |
| Motor vehicles, caravans, boats, etc. | 148.2 | 0 | 0 | 169 | 317.3 | 1025 | 30.956 |
| Recreational, cultural and sports services | 539.4 | 92.6 | 0.3 | 9 | 641.3 | 2128 | 30.136 |
| Gambling and betting services | 144.2 | 45.6 | 0 | 7 | 196.8 | 652 | 30.184 |
| Education | 24.8 | 0.2 | 14.5 | 6.1 | 45.6 | 135 | 33.778 |
| Actual & imputed rent on holiday houses | 355.3 | 64.2 | 0 | 16.9 | 436.5 | 1573 | 27.750 |
| Other tourism goods and services | 444.5 | 150.1 | 15.1 | 158.9 | 768.6 | 2488 | 30.892 |
| Total expenditure, \$m | 8864.9 | 3456.2 | 2432.5 | 964.4 | 15718.1 | 51161 | 30.723 |
| % | 56.4 | 22 | 15.5 | 6.1 | 100 | | |

Intrastate tourism consumption, by purpose of visit, New South Wales, 2000/01

| Commodities | Holiday | Vfr | Business | Other | NSW | Australia | % share of NSW |
|--|----------------|------------|-----------------|--------------|------------|------------------|-----------------------|
| Travel agency and tour operator services | 188.1 | 12.9 | 94.1 | 7.5 | 302.6 | 1248.1 | 24.245 |
| Taxi fares | 16.1 | 10 | 51.4 | 4.3 | 81.7 | 316.6 | 25.805 |
| Air transport | 78.5 | 36.1 | 188.1 | 14.3 | 316.9 | 2257.9 | 14.035 |
| Motor vehicle hire and lease | 41.4 | 17.4 | 59.8 | 3.1 | 121.6 | 496.9 | 24.472 |
| Accommodation services | 336.6 | 49.7 | 229 | 16.8 | 632.1 | 2879.1 | 21.955 |
| Takeaway and restaurant meals | 1229.6 | 517.2 | 99.1 | 104.9 | 1950.8 | 7230.6 | 26.980 |
| Shopping (including gifts and souvenirs) | 1428.8 | 530.3 | 5.4 | 133.9 | 2098.4 | 7165.1 | 29.286 |
| Other long distance transport costs | 45.7 | 31.9 | 97.9 | 3.4 | 178.9 | 663.9 | 26.947 |
| Local area passenger transportation | 20.4 | 8.3 | 1.5 | 2.3 | 32.6 | 117.3 | 27.792 |
| Repair and maintenance of motor vehicles | 52.5 | 18 | 7 | 19 | 96.4 | 358.5 | 26.890 |
| Fuel (petrol, diesel) | 587.2 | 356.4 | 251.2 | 94.7 | 1289.5 | 4468.5 | 28.858 |
| Food products | 649 | 225.4 | 10.5 | 58.6 | 943.4 | 3535.9 | 26.681 |
| Alcoholic beverages and other beverages | 353.3 | 184 | 9 | 13.7 | 560 | 2134.1 | 26.241 |
| Motor vehicles, caravans, boats, etc. | 104.1 | 0 | 0 | 150 | 254.1 | 883.8 | 28.751 |
| Recreational, cultural and sports services | 393.1 | 55.6 | 0.2 | 6 | 454.8 | 1708.2 | 26.625 |
| Gambling and betting services | 106.6 | 28.2 | 0 | 4.6 | 139.4 | 522.1 | 26.700 |
| Education | 22.9 | 0.1 | 8.1 | 4.8 | 36 | 116.4 | 30.928 |
| Actual and imputed rent on holiday houses | 209.2 | 30.9 | 0 | 10.4 | 250.5 | 1133.4 | 22.102 |
| Other tourism goods and services | 330.1 | 103.2 | 10.1 | 136.4 | 579.9 | 2067 | 28.055 |
| Total expenditure, \$m | 6193.2 | 2215.8 | 1122.3 | 788.6 | 10319.9 | 39303.6 | 26.257 |
| % | 60 | 21.5 | 10.9 | 7.6 | 100 | | |

Interstate tourism consumption, by purpose of visit, New South Wales, 2000/01

| COMMODITIES | HOLIDAY | VFR | BUSINESS | OTHER | NSW | Australia | % share of NSW |
|--|---------|--------|----------|-------|--------|-----------|----------------|
| Travel agency and tour operator services | 115.7 | 12.9 | 70.8 | 5 | 204.4 | 457.2 | 44.707 |
| Taxi fares | 8.6 | 7.5 | 39.2 | 1.4 | 56.7 | 121.3 | 46.744 |
| Air transport | 320.3 | 214.1 | 494.5 | 32.5 | 1061.5 | 2259.2 | 46.986 |
| Motor vehicle hire and lease | 28 | 12.8 | 51.9 | 1.3 | 94 | 205 | 45.854 |
| Accommodation services | 235.1 | 53.6 | 319.8 | 10.4 | 619 | 1364.5 | 45.365 |
| Takeaway and restaurant meals | 502.7 | 245.2 | 80.1 | 21.3 | 849.4 | 1897.8 | 44.757 |
| Shopping (including gifts and souvenirs) | 359.2 | 214.2 | 2.1 | 17.7 | 593.1 | 1273.8 | 46.561 |
| Other long distance transport costs | 17.9 | 19.4 | 66.8 | 1.4 | 105.5 | 225 | 46.889 |
| Local area passenger transportation | 6.6 | 4.3 | 0.8 | 0.5 | 12.2 | 27.1 | 45.018 |
| Repair and maintenance of motor vehicles | 22.2 | 11.6 | 4.4 | 2.4 | 40.6 | 91.5 | 44.372 |
| Fuel (petrol, diesel) | 162.3 | 97.3 | 153.7 | 10.3 | 423.6 | 897.5 | 47.198 |
| Food products | 252.2 | 117.4 | 6.9 | 12.9 | 389.5 | 881.8 | 44.171 |
| Alcoholic beverages and other beverages | 150.4 | 95.3 | 7.4 | 4.1 | 257.3 | 585.7 | 43.930 |
| Motor vehicles, caravans, boats, etc. | 44.1 | 0 | 0 | 19.1 | 63.2 | 141.2 | 44.759 |
| Recreational, cultural and sports services | 146.3 | 37 | 0.1 | 3 | 186.5 | 419.8 | 44.426 |
| Gambling and betting services | 37.5 | 17.4 | 0 | 2.4 | 57.3 | 129.8 | 44.145 |
| Education | 1.9 | 0.1 | 6.4 | 1.3 | 9.6 | 18.6 | 51.613 |
| Actual and imputed rent on holiday houses | 146.1 | 33.3 | 0 | 6.5 | 185.9 | 439.5 | 42.298 |
| Other tourism goods and services | 114.4 | 46.8 | 5 | 22.4 | 188.7 | 420.9 | 44.833 |
| Total expenditure, \$m | 2671.7 | 1240.5 | 1310.2 | 175.8 | 5398.1 | 11857.3 | 45.526 |
| % | 49.5 | 23 | 24.3 | 3.3 | 100 | | |

Outbound tourism consumption of Australian goods and services, by purpose of visit, NSW, 2000/01

| COMMODITIES | Households | Businesses | Total |
|--|--------------|--------------|---------------|
| Travel agency and tour operator services | 62.2 | 22.6 | 84.7 |
| Taxi fares | 5.1 | 6.4 | 11.5 |
| Air transport | 608.7 | 270.8 | 879.5 |
| Motor vehicle hire and lease | 0.0 | 0.0 | 0.0 |
| Accommodation services | 22.9 | 9.7 | 32.6 |
| Takeaway and restaurant meals | 8.9 | 3.2 | 12.1 |
| Shopping (including gifts and souvenirs) | 118.1 | 0.0 | 118.1 |
| Other long distance transport costs | 0.0 | 0.0 | 0.0 |
| Local area passenger transportation | 8.9 | 0.0 | 8.9 |
| Repair and maintenance of motor vehicles | 0.0 | 0.0 | 0.0 |
| Fuel (petrol, diesel) | 0.0 | 0.0 | 0.0 |
| Food products | 17.8 | 0.0 | 17.8 |
| Alcoholic beverages and other beverages | 17.8 | 3.2 | 21.0 |
| Motor vehicles, caravans, boats, etc. | 0.0 | 0.0 | 0.0 |
| Recreational, cultural and sports services | 0.0 | 0.0 | 0.0 |
| Gambling and betting services | 0.0 | 0.0 | 0.0 |
| Education | 0.0 | 0.0 | 0.0 |
| Actual and imputed rent on holiday houses | 0.0 | 0.0 | 0.0 |
| Other tourism goods and services | 17.8 | 6.4 | 24.2 |
| Total expenditure, \$m | 888.0 | 322.3 | 1210.3 |

NEW SOUTH WALES TOURISM SATELLITE ACCOUNT

International tourism consumption, New South Wales, by purpose of visit, 2000/01, \$m

| COMMODITY | HOLIDAY | VFR | BUSINESS | OTHER | NSW | Australia | % share of NSW |
|--|----------|---------|----------|----------|----------|-----------|----------------|
| Travel agency and tour operator services | 87.91 | 14.681 | 5.302 | 15.07 | 122.963 | 359 | 34.252 |
| Taxi fares | 22.586 | 4.987 | 4.307 | 7.596 | 39.476 | 111 | 35.564 |
| Air transport | 745.216 | 310.87 | 338.271 | 281.56 | 1675.917 | 4541.306 | 36.904 |
| Motor vehicle hire and lease | 48.976 | 9.801 | 13.498 | 7.027 | 79.303 | 224 | 35.403 |
| Accommodation services | 322.647 | 98.615 | 167.804 | 239.166 | 828.233 | 2212.001 | 37.443 |
| Takeaway and restaurant meals | 176.347 | 53.9 | 91.716 | 130.72 | 452.682 | 1209 | 37.443 |
| Shopping (including gifts and souvenirs) | 439.338 | 173.515 | 107.916 | 136.163 | 856.931 | 2377 | 36.051 |
| Other long distance transport costs | 148.069 | 32.692 | 28.238 | 49.799 | 258.798 | 727.694 | 35.564 |
| Local area passenger transportation | 40.492 | 8.94 | 7.722 | 13.618 | 70.773 | 199.001 | 35.564 |
| Repair and maintenance of motor vehicles | 1.602 | 1.181 | 0.569 | 3.559 | 6.911 | 18.001 | 38.392 |
| Fuel (petrol, diesel) | 40.693 | 13.143 | 5.821 | 18.867 | 78.524 | 219.001 | 35.856 |
| Food products | 161.032 | 49.218 | 83.75 | 119.367 | 413.368 | 1104.001 | 37.443 |
| Alcoholic beverages and other beverages | 77.89 | 23.807 | 40.51 | 57.737 | 199.944 | 533.999 | 37.443 |
| Motor vehicles, caravans, boats, etc. | 11.918 | 8.799 | 4.238 | 26.492 | 51.447 | 133.999 | 38.394 |
| Recreational, cultural and sports services | 60.655 | 21.187 | 9.429 | 44.676 | 135.948 | 372.999 | 36.447 |
| Gambling and betting services | 28.489 | 16.902 | 12.171 | 10.925 | 68.487 | 185 | 37.020 |
| Education | 25.612 | 30.329 | 1.884 | 453.889 | 511.714 | 1281 | 39.946 |
| Actual and imputed rent on holiday houses | 41.571 | 12.706 | 21.62 | 30.815 | 106.712 | 285 | 37.443 |
| Other tourism goods and services | 110.979 | 55.259 | 117.367 | 123.408 | 407.014 | 1047.999 | 38.837 |
| Total expenditure, \$m | 2592.022 | 940.531 | 1062.136 | 1770.454 | 6365.144 | 17141 | 37.134 |
| % | 40.722 | 14.776 | 16.687 | 27.815 | 100.000 | | |

Tourism consumption, New South Wales, by type of visitor, 2000/01, \$m

| COMMODITIES | Intrastate | Interstate | Inbound | Outbound | NSW | Australia | % share of NSW |
|--|------------|------------|----------|----------|-----------|-----------|----------------|
| Travel agency and tour operator services | 302.6 | 204.4 | 122.963 | 84.7 | 714.663 | 2271.099 | 31.468 |
| Taxi fares | 81.7 | 56.7 | 39.476 | 11.5 | 189.376 | 576.948 | 32.824 |
| Air transport | 316.9 | 1061.5 | 1675.917 | 879.5 | 3933.817 | 11203.243 | 35.113 |
| Motor vehicle hire and lease | 121.6 | 94 | 79.303 | 0 | 294.903 | 925.9 | 31.850 |
| Accommodation services | 632.1 | 619 | 828.233 | 32.6 | 2111.933 | 6535.102 | 32.317 |
| Takeaway and restaurant meals | 1950.8 | 849.4 | 452.682 | 12.1 | 3264.982 | 10366.908 | 31.494 |
| Shopping (including gifts and souvenirs) | 2098.4 | 593.1 | 856.931 | 118.1 | 3666.531 | 11103.877 | 33.020 |
| Other long distance transport costs | 178.9 | 105.5 | 258.798 | 0 | 543.198 | 1616.594 | 33.601 |
| Local area passenger transportation | 32.6 | 12.2 | 70.773 | 8.9 | 124.473 | 365.103 | 34.093 |
| Repair and maintenance of motor vehicles | 96.4 | 40.6 | 6.911 | 0 | 143.911 | 468.001 | 30.750 |
| Fuel (petrol, diesel) | 1289.5 | 423.6 | 78.524 | 0 | 1791.624 | 5585.001 | 32.079 |
| Food products | 943.4 | 389.5 | 413.368 | 17.8 | 1764.068 | 5565.105 | 31.699 |
| Alcoholic beverages and other beverages | 560 | 257.3 | 199.944 | 21 | 1038.244 | 3305.009 | 31.414 |
| Motor vehicles, caravans, boats, etc. | 254.1 | 63.2 | 51.447 | 0 | 368.747 | 1158.999 | 31.816 |
| Recreational, cultural and sports services | 454.8 | 186.5 | 135.948 | 0 | 777.248 | 2500.999 | 31.078 |
| Gambling and betting services | 139.4 | 57.3 | 68.487 | 0 | 265.187 | 836.9 | 31.687 |
| Education | 36 | 9.6 | 511.714 | 0 | 557.314 | 1416 | 39.358 |
| Actual and imputed rent on holiday houses | 250.5 | 185.9 | 106.712 | 0 | 543.112 | 1857.9 | 29.233 |
| Other tourism goods and services | 579.9 | 188.7 | 407.014 | 24.2 | 1199.814 | 3594.915 | 33.375 |
| Total expenditure, \$m | 10319.9 | 5398.1 | 6365.144 | 1210.3 | 23293.444 | 71253.9 | 32.691 |
| % | 44.304 | 23.174 | 27.326 | 5.196 | 100 | | |

INTERNATIONAL TOURISM CONSUMPTION, NSW & AUSTRALIA, 2000/01

Derivation of international tourism consumption, NSW & RoA, by purpose of visit, 2000/01, \$m

| | HOLIDAY | VFR | BUSINESS | OTHER | TOTAL |
|---|-----------------|----------------|-----------------|-----------------|-----------------|
| Expenditure by international visitors, Australia, 2000/01, \$m | 8049.759 | 2375.079 | 2344.671 | 4371.492 | 17141 |
| New South Wales share of inbound visitor expenditure (Table 4.1 & 4.2, BTR OP32*) | 0.322 | 0.396 | 0.453 | 0.405 | |
| Expenditure by international visitors in New South Wales, 2000/01, \$m | 2592.022 | 940.531 | 1062.136 | 1770.454 | 6365.144 |
| % | 0.407 | 0.148 | 0.167 | 0.278 | 1.000 |
| Expenditure by international visitors, RoA, 2000/01, \$m | 5457.737 | 1434.548 | 1282.535 | 2601.038 | 10775.857 |
| % | 0.506 | 0.133 | 0.119 | 0.241 | 1.000 |

* Bureau of Tourism Research office Occasional Paper No 32

OUTBOUND TOURISM by New South Wales and Total Australian Residents, 2000/01

Outbound Tourism by Australian Residents, 2000/01

| | Households | Businesses | Total |
|--|------------|------------|---------|
| Imports of tourism goods and services (\$m) | 10804 | 3922 | 14726 |
| % | 73.4 | 26.6 | 100 |
| Domestically produced goods and services (\$m) | 2165.8 | 786.2 | 2952 |
| Total (\$m) | 12969.8 | 4708.2 | 17678.0 |

Outbound tourism by New South Wales residents, 2000/01

| | Households | Businesses | Total |
|--|------------|------------|---------|
| Imports of tourism goods and services (\$m) | 4429.64 | 1608.02 | 6037.66 |
| % | 73.4 | 26.6 | 100 |
| Domestically produced goods and services (\$m) | 888.0 | 322.3 | 1210.3 |

TOURISM CONSUMPTION, BY TYPE OF VISITOR, AUSTRALIA, 2000/01

Domestic tourism consumption, by purpose of visit, Australia, 2000/01, \$m

| COMMODITIES | HOLIDAY | VFR | BUSINESS | OTHER | TOTAL |
|--|----------------|----------------|---------------|---------------|----------------|
| Travel agency and tour operator services | 1073.3 | 82.5 | 504.0 | 45.7 | 1705.4 |
| Taxi fares | 88.9 | 55.5 | 274.3 | 19.2 | 437.9 |
| Air transport | 1436.3 | 795.1 | 2119 | 166.8 | 4517.1 |
| Motor vehicle hire and lease | 249.3 | 95.6 | 342.0 | 15.2 | 702.0 |
| Accommodation services | 2099.1 | 329.6 | 1712.4 | 102.5 | 4243.5 |
| Takeaway and restaurant meals | 5812.0 | 2356.7 | 543.1 | 416.6 | 9128.5 |
| Shopping (including gifts and souvenirs) | 5623.8 | 2299.1 | 22.0 | 494.0 | 8439.0 |
| Other long distance transport costs | 216.8 | 160.7 | 494.7 | 16.7 | 888.9 |
| Local area passenger transportation | 89.2 | 39.2 | 7.0 | 8.9 | 144.3 |
| Repair and maintenance of motor vehicles | 258.4 | 92.8 | 34.0 | 64.8 | 450.0 |
| Fuel (petrol, diesel) | 2445.9 | 1382.4 | 1210.0 | 327.7 | 5366.0 |
| Food products | 3070.7 | 1064.3 | 52.0 | 230.7 | 4417.7 |
| Alcoholic beverages and other beverages | 1742.6 | 867.2 | 50.1 | 59.9 | 2719.8 |
| Motor vehicles, caravans, boats, etc. | 512.5 | 0.0 | 0.0 | 512.5 | 1025.0 |
| Recreational, cultural and sports services | 1804.3 | 290.9 | 1.0 | 31.8 | 2128.0 |
| Gambling and betting services | 483.4 | 143.0 | 0.0 | 25.6 | 652.0 |
| Education | 70.2 | 0.7 | 44.0 | 20.1 | 135.0 |
| Actual and imputed rent on holiday houses | 1304.5 | 204.8 | 0.0 | 63.7 | 1573.0 |
| Other tourism goods and services | 1486.7 | 462.7 | 44.3 | 494.3 | 2488.0 |
| Total expenditure, \$m | 29868.0 | 10722.5 | 7453.8 | 3116.8 | 51161.0 |
| % | 58.4 | 21.0 | 14.6 | 6.1 | 100 |

NEW SOUTH WALES TOURISM SATELLITE ACCOUNT

Intrastate tourism consumption, by purpose of visit, Australia, 2000/01, \$m

| COMMODITIES | HOLIDAY | VFR | BUSINESS | OTHER | TOTAL |
|--|---------|--------|----------|--------|---------|
| Travel agency and tour operator services | 804.6 | 52.3 | 358.7 | 32.7 | 1248.1 |
| Taxi fares | 68.8 | 38 | 194 | 15.8 | 316.6 |
| Air transport | 694.8 | 309.4 | 1164.7 | 89.1 | 2257.9 |
| Motor vehicle hire and lease | 183.8 | 65.8 | 235.5 | 11.8 | 496.9 |
| Accommodation services | 1544 | 204.5 | 1055.3 | 75.2 | 2879.1 |
| Takeaway and restaurant meals | 4683.6 | 1802.5 | 379.2 | 365.4 | 7230.6 |
| Shopping (including gifts and souvenirs) | 4876.2 | 1817.3 | 17.7 | 453.8 | 7165.1 |
| Other long distance transport costs | 176.4 | 116.1 | 358.2 | 13.2 | 663.9 |
| Local area passenger transportation | 74.7 | 29.4 | 5.3 | 7.8 | 117.3 |
| Repair and maintenance of motor vehicles | 207.6 | 66.2 | 25 | 59.7 | 358.5 |
| Fuel (petrol, diesel) | 2095.6 | 1170.6 | 896.3 | 306 | 4468.5 |
| Food products | 2501 | 797.4 | 38 | 199.7 | 3535.9 |
| Alcoholic beverages and other beverages | 1399.2 | 650.4 | 34.9 | 49.7 | 2134.1 |
| Motor vehicles, caravans, boats, etc. | 411.8 | 0 | 0 | 472 | 883.8 |
| Recreational, cultural and sports services | 1477.7 | 205.7 | 0.7 | 24.1 | 1708.2 |
| Gambling and betting services | 399.7 | 103 | 0 | 19.4 | 522.1 |
| Education | 68 | 0.5 | 30.9 | 17 | 116.4 |
| Actual and imputed rent on holiday houses | 959.6 | 127.1 | 0 | 46.7 | 1133.4 |
| Other tourism goods and services | 1232.2 | 357.1 | 34.2 | 443.4 | 2067 |
| Total expenditure, \$m | 23859.3 | 7913.7 | 4828.3 | 2702.3 | 39303.6 |
| % | 60.7 | 20.1 | 12.3 | 6.9 | 100.0 |

Interstate tourism consumption, by purpose of visit, Australia, 2000/01, \$m

| COMMODITIES | HOLIDAY | VFR | BUSINESS | OTHER | TOTAL |
|--|---------|--------|----------|-------|---------|
| Travel agency and tour operator services | 268.7 | 30.1 | 145.4 | 13 | 457.2 |
| Taxi fares | 20.1 | 17.4 | 80.3 | 3.5 | 121.3 |
| Air transport | 741.5 | 485.6 | 954.2 | 77.8 | 2259.2 |
| Motor vehicle hire and lease | 65.5 | 29.7 | 106.5 | 3.3 | 205 |
| Accommodation services | 555 | 124.9 | 657.1 | 27.3 | 1364.5 |
| Takeaway and restaurant meals | 1128.4 | 554.1 | 164 | 51.2 | 1897.8 |
| Shopping (including gifts and souvenirs) | 747.6 | 481.8 | 4.2 | 40.2 | 1273.8 |
| Other long distance transport costs | 40.4 | 44.5 | 136.5 | 3.5 | 225 |
| Local area passenger transportation | 14.5 | 9.8 | 1.7 | 1.2 | 27.1 |
| Repair and maintenance of motor vehicles | 50.7 | 26.7 | 9 | 5.1 | 91.5 |
| Fuel (petrol, diesel) | 350.3 | 211.8 | 313.7 | 21.7 | 897.5 |
| Food products | 569.7 | 266.9 | 14.1 | 30.9 | 881.8 |
| Alcoholic beverages and other beverages | 343.5 | 216.6 | 15.2 | 10.3 | 585.7 |
| Motor vehicles, caravans, boats, etc. | 100.7 | 0 | 0 | 40.5 | 141.2 |
| Recreational, cultural and sports services | 326.6 | 85.2 | 0.2 | 7.7 | 419.8 |
| Gambling and betting services | 83.6 | 40 | 0 | 6.2 | 129.8 |
| Education | 2.3 | 0.2 | 13.1 | 3.1 | 18.6 |
| Actual and imputed rent on holiday houses | 344.9 | 77.6 | 0 | 17 | 439.5 |
| Other tourism goods and services | 254.5 | 105.4 | 10.1 | 50.8 | 420.9 |
| Total expenditure, \$m | 6008.7 | 2808.9 | 2625.5 | 414.4 | 11857.3 |
| % | 50.7 | 23.7 | 22.1 | 3.5 | 100.0 |

Outbound tourism consumption of Australian goods and services, by traveller type, Aust., 2000/01

| COMMODITIES | Households | Businesses | Total |
|--|-------------------|-------------------|-----------------|
| Travel agency and tour operator services | 151.669 | 55.129 | 206.799 |
| Taxi fares | 12.436 | 15.612 | 28.048 |
| Air transport | 1484.263 | 660.574 | 2144.837 |
| Motor vehicle hire and lease | 0.000 | 0.000 | 0.000 |
| Accommodation services | 55.840 | 23.662 | 79.501 |
| Takeaway and restaurant meals | 21.702 | 7.806 | 29.508 |
| Shopping (including gifts and souvenirs) | 287.977 | 0.000 | 287.977 |
| Other long distance transport costs | 0.000 | 0.000 | 0.000 |
| Local area passenger transportation | 21.702 | 0.000 | 21.702 |
| Repair and maintenance of motor vehicles | 0.000 | 0.000 | 0.000 |
| Fuel (petrol, diesel) | 0.000 | 0.000 | 0.000 |
| Food products | 43.404 | 0.000 | 43.404 |
| Alcoholic beverages and other beverages | 43.404 | 7.806 | 51.210 |
| Motor vehicles, caravans, boats, etc. | 0.000 | 0.000 | 0.000 |
| Recreational, cultural and sports services | 0.000 | 0.000 | 0.000 |
| Gambling and betting services | 0.000 | 0.000 | 0.000 |
| Education | 0.000 | 0.000 | 0.000 |
| Actual and imputed rent on holiday houses | 0.000 | 0.000 | 0.000 |
| Other tourism goods and services | 43.404 | 15.612 | 59.016 |
| Total expenditure, \$m | 2165.800 | 786.200 | 2952.000 |

International tourism consumption, by purpose of visit, Australia, 2000/01, \$m

| COMMODITY | HOLIDAY | VFR | BUSINESS | OTHER | TOTAL |
|--|-----------------|-----------------|-----------------|-----------------|--------------|
| Travel agency and tour operator services | 273.012 | 37.073 | 11.705 | 37.210 | 359.000 |
| Taxi fares | 70.143 | 12.593 | 9.508 | 18.756 | 111.000 |
| Air transport | 2314.334 | 785.025 | 746.735 | 695.211 | 4541.306 |
| Motor vehicle hire and lease | 152.101 | 24.751 | 29.798 | 17.351 | 224.000 |
| Accommodation services | 1002.010 | 249.029 | 370.429 | 590.534 | 2212.001 |
| Takeaway and restaurant meals | 547.663 | 136.110 | 202.463 | 322.764 | 1209.000 |
| Shopping (including gifts and souvenirs) | 1364.403 | 438.168 | 238.225 | 336.204 | 2377.000 |
| Other long distance transport costs | 459.842 | 82.556 | 62.336 | 122.960 | 727.694 |
| Local area passenger transportation | 125.752 | 22.576 | 17.047 | 33.625 | 199.001 |
| Repair and maintenance of motor vehicles | 4.977 | 2.982 | 1.255 | 8.787 | 18.001 |
| Fuel (petrol, diesel) | 126.376 | 33.189 | 12.851 | 46.586 | 219.001 |
| Food products | 500.099 | 124.289 | 184.880 | 294.733 | 1104.001 |
| Alcoholic beverages and other beverages | 241.895 | 60.118 | 89.425 | 142.561 | 533.999 |
| Motor vehicles, caravans, boats, etc. | 37.014 | 22.219 | 9.355 | 65.412 | 133.999 |
| Recreational, cultural and sports services | 188.369 | 53.503 | 20.815 | 110.311 | 372.999 |
| Gambling and betting services | 88.476 | 42.682 | 26.867 | 26.975 | 185.000 |
| Education | 79.539 | 76.588 | 4.159 | 1120.714 | 1281.000 |
| Actual and imputed rent on holiday houses | 129.101 | 32.085 | 47.727 | 76.086 | 285.000 |
| Other tourism goods and services | 344.655 | 139.543 | 259.089 | 304.712 | 1047.999 |
| Total expenditure, \$m | 8049.759 | 2375.079 | 2344.671 | 4371.492 | 17141 |

Tourism consumption, Australia, by type of visitor, 2000/01, \$m

| COMMODITIES | Intrastate | Interstate | Inbound | Outbound | Total |
|--|-------------------|-------------------|----------------|-----------------|--------------|
| Travel agency and tour operator services | 1248.100 | 457.200 | 359.000 | 206.799 | 2271.099 |
| Taxi fares | 316.600 | 121.300 | 111.000 | 28.048 | 576.948 |
| Air transport | 2257.900 | 2259.200 | 4541.306 | 2144.837 | 11203.243 |
| Motor vehicle hire and lease | 496.900 | 205.000 | 224.000 | 0.000 | 925.900 |
| Accommodation services | 2879.100 | 1364.500 | 2212.001 | 79.501 | 6535.102 |
| Takeaway and restaurant meals | 7230.600 | 1897.800 | 1209.000 | 29.508 | 10366.908 |
| Shopping (including gifts and souvenirs) | 7165.100 | 1273.800 | 2377.000 | 287.977 | 11103.877 |
| Other long distance transport costs | 663.900 | 225.000 | 727.694 | 0.000 | 1616.594 |
| Local area passenger transportation | 117.300 | 27.100 | 199.001 | 21.702 | 365.103 |
| Repair and maintenance of motor vehicles | 358.500 | 91.500 | 18.001 | 0.000 | 468.001 |
| Fuel (petrol, diesel) | 4468.500 | 897.500 | 219.001 | 0.000 | 5585.001 |
| Food products | 3535.900 | 881.800 | 1104.001 | 43.404 | 5565.105 |
| Alcoholic beverages and other beverages | 2134.100 | 585.700 | 533.999 | 51.210 | 3305.009 |
| Motor vehicles, caravans, boats, etc. | 883.800 | 141.200 | 133.999 | 0.000 | 1158.999 |
| Recreational, cultural and sports services | 1708.200 | 419.800 | 372.999 | 0.000 | 2500.999 |
| Gambling and betting services | 522.100 | 129.800 | 185.000 | 0.000 | 836.900 |
| Education | 116.400 | 18.600 | 1281.000 | 0.000 | 1416.000 |
| Actual and imputed rent on holiday houses | 1133.400 | 439.500 | 285.000 | 0.000 | 1857.900 |
| Other tourism goods and services | 2067.000 | 420.900 | 1047.999 | 59.016 | 3594.915 |
| Total expenditure, \$m | 39303.600 | 11857.300 | 17141.000 | 2952.000 | 71253.900 |
| % | 55.160 | 16.641 | 24.056 | 4.143 | 100.000 |

Tourism employed persons, by industry and type of visitor, New South Wales, 2000/01 ('000)

| Tourism industries | Intrastate | Interstate | Inbound | Outbound | NSW Total | Aust. total | % share of NSW |
|---|-------------------|-------------------|----------------|-----------------|------------------|--------------------|-----------------------|
| Tourism characteristic industries | | | | | | | |
| Travel agency and tour operator services | 3.009 | 1.933 | 1.223 | 0.843 | 7.007 | 23.7 | 29.6 |
| Road transport and motor vehicle hiring | 2.334 | 1.265 | 2.226 | 0.154 | 5.980 | 23.3 | 25.7 |
| Air and water transport | 0.944 | 3.640 | 4.937 | 2.582 | 12.103 | 36 | 33.6 |
| Accommodation | 12.847 | 7.303 | 6.371 | 0.222 | 26.743 | 99 | 27.0 |
| Cafes, restaurants and food outlets | 6.605 | 3.755 | 3.275 | 0.114 | 13.750 | 50.9 | 27.0 |
| Clubs, pubs, taverns and bars | 3.568 | 2.029 | 1.770 | 0.062 | 7.429 | 27.5 | 27.0 |
| Total tourism characteristic industries | 29.308 | 19.925 | 19.802 | 3.977 | 73.011 | 260.4 | 28.0 |
| Tourism connected industries | | | | | | | |
| Rail transport | 0.374 | 0.273 | 0.344 | 0.000 | 0.991 | 3.7 | 26.8 |
| Manufacturing | 5.246 | 1.644 | 1.880 | 0.180 | 8.950 | 38.8 | 23.1 |
| Retail trade | 35.551 | 11.212 | 12.819 | 1.360 | 60.942 | 143.6 | 42.4 |
| Casinos and other gambling services | 0.384 | 0.157 | 0.132 | 0.000 | 0.673 | 2.6 | 25.9 |
| Libraries, museums and arts | 1.834 | 0.752 | 0.631 | 0.000 | 3.218 | 11 | 29.3 |
| Other entertainment services | 2.568 | 1.053 | 0.883 | 0.000 | 4.505 | 15.4 | 29.3 |
| Education | 0.506 | 0.135 | 7.203 | 0.000 | 7.844 | 18.8 | 41.7 |
| Total tourism connected industries | 46.464 | 15.228 | 23.892 | 1.540 | 87.123 | 233.9 | 37.2 |
| All other industries | 14.297 | 5.186 | 5.193 | 0.333 | 25.009 | 55.3 | 45.2 |
| Total industry tourism employment ('000) | 90.069 | 40.339 | 48.886 | 5.850 | 185.144 | 549.6 | 33.7 |
| Total employed person ('000) | 3044.317 | 3044.317 | 3044.317 | 3044.32 | 3044.317 | 9123 | |
| Share of tourism in employment (%) | 2.959 | 1.325 | 1.606 | 0.192 | 6.082 | 6.024 | |
| Contribution to NSW tourism employment (%), by type of visitor | 48.6 | 21.8 | 26.4 | 3.2 | 100.0 | | |

APPENDIX B: CONCEPTS SOURCES AND METHODS

INTRODUCTION

The national accounts are a comprehensive set of data that represent fully the economic activities of a nation. Satellite Accounts are an expansion of the national accounts into selected areas of interests while maintaining the concepts and structures of the core accounts. A Tourism Satellite Account (TSA) therefore describes the concepts and structures of tourism separated out within the national accounting framework.

Tourism activities, and contribution of tourism to the economy, are included implicitly in the measures of core national accounts. However, the products that are produced and consumed for satisfying tourism demand are not readily apparent. This is because 'tourism' is not identified as a conventional industry or product in international statistical standards. Industries are defined and classified according to the goods and services that they produce, whereas tourism depends on the characteristics of the consumer.

A TSA provides a means by which tourism's contribution to major national accounting aggregates can be determined. Further, economic aspects of tourism can be analysed separately and compared with other industries.

TOURISM CONSUMPTION

Visitors are classified into four groups: intrastate, interstate, outbound and inbound, and four purposes of visit: holidays, visiting friends and relatives (VFR), business and other. To derive patterns of tourism consumption for New South Wales, by types of visitors and by purposes of visit, we utilised published and unpublished data sources from the BTR and from the national TSA.

TOURISM GROSS VALUE ADDED

Tourism industry Gross Value Added is calculated as the basic value of output less the value of inputs used in producing the tourism product, exclusive of product taxes. Tourism Gross Value Added measures the total value of tourism industry gross value added generated by tourism consumption. Tourism Gross Value Added is comparable with the gross value added of conventional industries that are presented in the national accounts.

TOURISM GROSS STATE PRODUCT/DOMESTIC PRODUCT (GSP/GDP)

Tourism GSP/GDP measures the Tourism Gross Value Added at purchasers' (market) prices. It includes taxes paid less subsidies received on tourism related products consumed by visitors. Tourism GSP/GDP is a satellite account construct for direct comparison with the GSP/GDP concepts of national accounts.

CALCULATING TOURISM GROSS VALUE ADDED AND TOURISM GSP/GDP

As the tourism industry depends on the status of the consumer, the calculation of tourism gross value added will first require an estimation of tourism consumption. The procedure of calculating tourism gross value added is described as follows:

- derive an estimate of tourism consumption at purchasers' prices by commodity and by purpose of visit for each type of visitor
- derive the tourism consumption at basic prices by removing product taxes and subsidies, margins and imports from the tourism consumption of each product at purchasers' prices; this represents the domestic output of tourism (i.e. the supply of domestic output to satisfy tourism consumption for each type of visitor)
- for each output of commodity supplying to the visitors, derive its industry gross value added; this requires information on the industry's cost structure
- derive the values of industry gross value added that correspond to the commodities consumed by visitors, assuming a constant ratio of value added to output for any industry that produces both tourism and non-tourism products; the sum of all these industry gross value added represent tourism gross value added
- tourism GSP/GDP is obtained by adding net taxes on tourism products to Tourism Gross Value Added. Tourism GSP/GDP is comparable to GSP/GDP.

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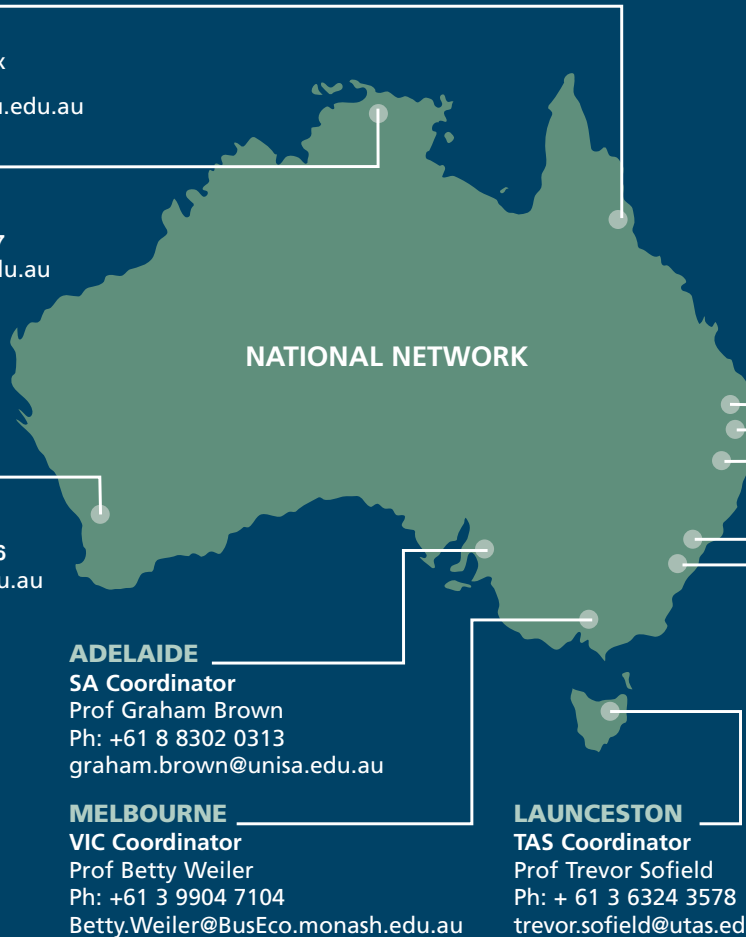
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