In terms of ranking, the economic importance of tourism is highest in Central NT, Phillip Island, Whitsundays, Snowy Mountains and West Coast – each with estimates of economic importance over 15%. Central NT ranks highest with an estimate of 24.8%[7] and Phillip Island comes in second at 18.7%. The top five regions only accounted for 3% of Australia's total tourism expenditure in 2007/08.

In contrast, some of the regions with lower importance estimates are Australia's largest tourism industries based on total expenditure – Sydney, Melbourne, Brisbane, Adelaide and Experience Perth (Table 4).[8] The estimates for these regions are below the benchmark of 3.0%.

Table 3: Less dependent regions with larger tourism industries

Rank	Tourism region	State	Economic importance of tourism	Total tourism expenditure
			%	Purchaser's prices, $m
67	Sydney	NSW	2.4	11,751
69	Melbourne	Vic	2.3	9,120
71	Brisbane	Qld	1.9	5,068
72	Adelaide	SA	1.7	2,325
73	Experience Perth	WA	1.6	4,474

Figure 3 plots the relative size of the tourism industry (based on tourism expenditure) against the relative importance of tourism for each tourism region. To gauge the relative size of the estimates for each region, benchmarks for Australia are used[9] and the difference between the region estimates and the benchmark are calculated. Therefore, regions to the right of the vertical axis rely more on tourism relative to the benchmark. Similarly, regions above the horizontal axis have high levels of expenditure, relative to the benchmark.

[7] Estimates for Central NT may be overestimated. This overestimation can be attributed to the overestimation of total tourism expenditure and/or the underestimation of total regional output. Tourism expenditure is likely to be overestimated as a result of the regional expenditure allocation process; particularly the allocation of long-distance transport costs amongst regions in the NT. Tourism output is likely to be underestimated due to government benefits/allowances being excluded from the personal income data. The ABS does not publish data on government welfare/benefits for rural NT regions due to data reliability issues (see ABS cat. no 6537.0); however, in 2008 the employment gap between Indigenous and non-Indigenous Australians in the NT was the highest of all the states and territories (see Commonwealth of Australia, *Closing the Gap Prime Minister's Report 2010*). With many Indigenous communities concentrated in Central NT, it is likely that estimates for personal income and tourism-dependency are overestimated.

[8] The total tourism expenditure estimates exclude travel expenditure both before and after a visitor's outbound trip. As a result, estimates for regions that are major international gateways (e.g. capital cities), may be underestimated.

[9] The benchmark for tourism industry size is $967 million (average total tourism expenditure across all regions in Australia).

Figure 3: Comparison between industry size and economic importance of tourism

Tropical North Queensland, Sunshine Coast, Gold Coast, Mid North Coast, Northern Rivers, South Coast and Australia's South West have large tourism industries, and they are also highly dependent on tourism. Together, these regions account for 21% of total tourism expenditure in Australia.

5 Conclusion

While the majority of tourism expenditure in Australia was limited to a small number of regions, there are a significantly larger number of tourism regions that rely on tourism as part of their economic base – showing that the economic importance of tourism within a tourism region is not determined by the size of that region's tourism industry. While it has not been possible to calculate the actual level of tourism importance in a region, the proxy measures developed do provide an indication of the relative importance of tourism in 77 of Australia's tourism regions.

The findings suggest that the economic importance of tourism is highest in Central NT, Phillip Island, Whitsundays, Snowy Mountains and West Coast in Tasmania. These regions all have relatively small economies with small tourism industries that rely significantly on tourism.

In contrast, the economic importance of tourism in regions like Tropical North Queensland, Sunshine Coast, Gold Coast, Mid North Coast, Northern Rivers, South Coast and Australia's South West cannot be understated, as they also have relatively large tourism industries.

Tourism regions whose economies are dependent on tourism are more likely to be vulnerable to shocks that affect the tourism industry. Whether their economies are large or small, the importance of these local tourism industries to their regional economies is considerable, as unexpected shocks could impact on the entire local economy.

Appendices

Appendix A: Detailed methodology

The concept underpinning the economic importance of tourism estimates in this report is essentially a ratio of output measures, whereby,

$$\textbf{Economic importance of tourism} = \frac{\textbf{Tourism output}}{\textbf{Total output}} \approx \frac{\textbf{Total tourism expenditure}}{\textbf{Total output}}$$

The numerator must reflect some measure of output that is generated by the region's tourism industry. The denominator, on the other hand, needs to reflect the region's economic base – the total output generated by the economy.

A1 Tourism output

'Tourism output' is the value of goods and services, at basic prices[10], which are consumed by visitors and produced in the region by industries in a direct relationship with visitors. Currently there are no data or estimates available on tourism output at either the Statistical Local Area (SLA) or regional level. It is possible, however, to use regional tourism expenditure as a proxy variable. Tourism expenditure comprises 'the amount paid by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination'.[11]

Regional tourism expenditure estimates for domestic day, domestic overnight and international visitors are calculated by TRA using a regional tourism expenditure allocation method.[12] The variable of interest is total tourism expenditure. It is derived by aggregating the estimates for each region's domestic day, domestic overnight, and international visitor expenditure (see Table A1). These estimates are given in purchasers' prices.[13]

Table A1: Example derivation of total tourism expenditure estimates for each tourism region

Tourism region	Variable	Domestic day ($m)	Domestic overnight ($m) *(Including airfares)*	International ($m) *(Including package expenditure)*	Total
South Coast (NSW)	Tourism expenditure 2007/08, purchaser's prices ($m)	521	1,263	140	1,924

[10] Basic prices – See Glossary.
[11] ABS 2010 cat no. 5249.0
[12] See References for more information.
[13] See Glossary.

TRA collects tourism expenditure data from the International Visitor Survey (IVS) and National Visitor Survey (NVS) and these data are then used to generate estimates for each region's expenditure by domestic day, domestic overnight and international visitors. The sample sizes for each visitor type have been added together to get the total sample size for each tourism region. Total tourism expenditure data for each region is only used if the total sample size is greater than 50. Appendix B lists the total sample sizes for each region in 2007/08.

Since the estimates for total *regional* output (see Section A2) are given in basic prices, it is necessary to convert the tourism expenditure estimates from purchaser's prices to basic prices. In order to do that, a weight (Weight A) is calculated and applied to the tourism expenditure estimates. The weight reflects the relationship between tourism output and tourism consumption at a state/territory level. Box A1 explains why tourism consumption is substituted into the weight instead of tourism expenditure.

It is assumed that the ratio of tourism output to consumption is the same for each region within the relevant state/territory. Tourism output is used in the weight because it is a variable that (i) is given in basic prices, and (ii) approximates total tourism expenditure.

$$\textbf{Weight A} = \frac{\textbf{Tourism output}_{\text{State}}\ (\text{Basic prices})}{\textbf{Tourism consumption}_{\text{State}}\ (\text{Purchaser's prices})}$$

Once calculated, the weight is then applied to the total tourism expenditure of each region in the corresponding state. Consider the following examples.

1) For New South Wales (NSW),

$$\textbf{Weight A}_{\text{NSW}} = \frac{\textbf{Tourism output}_{\text{NSW}}\ (\text{Basic prices})}{\textbf{Tourism consumption}_{\text{NSW}}\ (\text{Purchaser's prices})} = \frac{\mathbf{26,619,000,000}}{\mathbf{28,289,000,000}}$$
$$= \mathbf{0.9410}$$

This weight is then applied to total tourism expenditure for every New South Wales region, such that,

$$\textbf{Total tourism expenditure (Basic prices)}_{\text{Region}}$$
$$= \textbf{Weight A}_{\text{NSW}} \times \textbf{Total tourism expenditure (Purchaser's prices)}_{\text{Region}}$$

For instance:

Region	**Total tourism expenditure** ***(Purchaser's prices)***	**Weight A**	**Total tourism expenditure** ***(Basic prices)***
South Coast (NSW)	1,923,685,000	0.9410	1,810,123,052

2) For South Australia (SA),

$$\textbf{Weight A}_{\text{SA}} = \frac{\textbf{Tourism output}_{\text{SA}}\ (\text{Basic prices})}{\textbf{Tourism consumption}_{\text{SA}}\ (\text{Purchaser's prices})} = \frac{\mathbf{3,913,000,000}}{\mathbf{4,904,000,000}} = \mathbf{0.7979}$$

This weight is then applied to every region in South Australia:

Region	Total tourism expenditure (Purchaser's prices)	Weight A	Tourism expenditure (Basic prices)
Limestone Coast (SA)	250,883,000	0.7979	200,184,580

The readjusted tourism expenditure estimates are then substituted as the tourism output variable in the estimates.

Box A1: Difference between tourism consumption and tourism expenditure

Tourism expenditure consists of the amount paid by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination.

Tourism consumption consists of tourism expenditure plus imputed consumption by resident and non-resident visitors on tourism-related products, including those sold at prices that are not economically significant. The imputed consumption includes:

- Actual and imputed rent on dwellings – the consumption of housing services provided by holiday houses to the owner
- Products provided to visitors in private households
- Non-market services provided by government – e.g. museum services.

In short, tourism consumption equals tourism expenditure plus imputed values.

The reason tourism consumption is used in Weight A, as opposed to tourism expenditure, is to ensure measurement consistency with tourism output. Since tourism output is derived from tourism consumption, it also accounts for imputed values.

A2 Regional output

In order to derive the economic base for each tourism region, data collected at the SLA level needs to be aggregated according to SLA and tourism region concordances.[14] Presently, however, the data needed to calculate the regional economic base is not available at either the SLA or regional level. In other words, there are no readily-available estimates of regional income, output, or gross value-added.

Unfortunately, a direct consequence of this absent data is that calculating economic importance of tourism is not as straightforward as calculating national importance (direct tourism contribution). Each economic importance estimate must reflect the respective region's economic base – the size of the region's economy.

The economic importance estimates in this report rely on estimates of total regional output. The starting point for estimating regional output is ABS data on total personal income. This data set[15] provides estimates of personal income at the SLA level. In order to obtain the regional estimates for personal income, the SLA estimates are aggregated according to the 2009 tourism region concordances.

The regional estimates of personal income cannot, however, be substituted directly into the economic importance formula as a proxy for regional output. The reason for this is due to the nature of the personal income data. These data only account for the following sources of income:

- Wage and salary
- Own unincorporated business
- Investment
- Superannuation and annuities
- Other income (excluding government pensions and allowances).

The data do not explicitly include income that is (i) received by incorporated businesses and (ii) does not fall within the scope of aforementioned income categories. For example, commercial revenue that is not distributed among the income categories above remains unaccounted for in the personal income estimates. As such, a second weight (Weight B) is devised in order to obtain estimates regional output. This weight essentially uses the relationship between a region's total personal income and its state's total personal income to estimate the proportion of state output attributable to that region. In other words, the proportion of state total personal income attributable to a region is assumed to hold for output.

The relevant weight is derived as follows,

$$\textbf{Weight B} = \frac{\textbf{Total personal income}_{\text{Region}}}{\textbf{Total personal income}_{\text{State}}}$$

This weight is then applied to the corresponding region's total state output in order to obtain an estimate of total regional output in basic prices.[16]

[14] ABS 2009, cat no. 9503.0.55.001.
[15] ABS 2010 cat no. 6524.0.55.002.
[16] Basic prices – see Glossary.

Consider the following example for the South Coast.

$$\textbf{Weight B}_{\text{South Coast}} = \frac{\textbf{Total personal income}_{\text{South Coast}}}{\textbf{Total personal income}_{\text{NSW}}} = \frac{9,172,495,033}{185,476,427,504} = 0.0495$$

and

$$\textbf{Total state output (Basic prices)}_{\text{NSW}} = 683,745,562,500$$[17]

Therefore,

$$\textbf{Total regional output (Basic prices)}_{\text{South Coast}} = \textbf{Total state output (Basic prices)}_{\text{NSW}} \times \textbf{Weight B}_{\text{South Coast}}$$

Region	Total state output (Basic prices)	Weight B	Total regional output (Basic prices)
South Coast (NSW)	683,745,562,500	0.0495	33,813,745,823

This result is then used as an estimate of South Coast's economic base; it is used as a proxy estimate for the region's output.

Calculating the economic importance of tourism estimates

Once estimates for tourism output and total regional output were obtained for each tourism region, the economic importance of tourism is calculated by dividing tourism output over total regional output.

$$\textbf{Economic Importance of Tourism}(\%) = \frac{\textbf{Tourism output}}{\textbf{Total regional output}} \approx \frac{\textbf{Total tourism expenditure}}{\textbf{Total regional output}}$$

The economic importance estimates reflect the percentage of a region's total output that is attributable to its local tourism industry.

[17] STCRC unpublished data.

A3 Data sources

The economic importance of tourism estimates calculated in this report relate only to the 2007/08 financial year. This is due to the lack of more recent data on total personal income.

Table A1 lists all the variables used in the methodology as well as the corresponding data sources.

Table A1: Variables of interest and corresponding data sources

Variable	Source
Tourism expenditure	TRA expenditure allocation method applied to National Visitor Survey and International Visitor Survey data, 2007/08 (unpublished data)
State tourism output at basic prices	Pambudi et al. (2009)
State tourism consumption at purchaser's prices	Pambudi et al. (2009)
Total personal income	ABS cat no. 6524.0.55.002 2007/08
State total output at basic prices	STCRC unpublished data

Appendix B: Detailed results

Table B1: Total tourism expenditure, sample sizes, total output and economic importance of tourism estimates (in order of magnitude)

Tourism region	Total tourism expenditure		TRA data	Total output	Economic importance of tourism
	Purchaser's prices[18], $m	Basic prices[19], $m	Sample size[20]	Basic prices, $m	%
NSW					
Snowy Mountains	495	465	369	2,726	17.1
Mid North Coast	2,041	1,921	1,987	21,960	8.7
Northern Rivers	1,185	1,115	1,262	18,275	6.1
The Murray	409	385	464	7,061	5.5
Outback NSW	186	175	198	3,218	5.4
South Coast	1,924	1,810	2,296	33,814	5.4
Central NSW	934	879	1,124	17,254	5.1
New England North West	622	585	752	12,108	4.8
Blue Mountains	431	406	721	9,236	4.4
Riverina	450	423	498	11,775	3.6
Central Coast	844	794	1,104	24,595	3.2
Hunter	1,368	1,287	1,794	44,799	2.9
Capital Country	417	392	673	15,197	2.6
Sydney	11,751	11,057	17,836	459,679	2.4
Vic					
Phillip Island	391	353	539	1,887	18.7
Spa Country	163	147	173	1,027	14.3
Lakes	296	267	283	2,898	9.2
Upper Yarra	92	83	147	1,087	7.7
Central Murray	373	337	414	4,574	7.4
High Country	470	425	479	5,872	7.2
Western	880	794	1,128	12,820	6.2
Mallee	260	235	358	6,124	3.8
Ballarat	310	280	439	7,372	3.8
Central Highlands	76	69	128	2,000	3.4

[18] Purchaser's prices – See Detailed methodology (Appendix A) and Glossary.
[19] Basic prices – See Detailed methodology (Appendix A) and Glossary.
[20] The estimates for tourism expenditure are derived by TRA using their regional tourism expenditure allocation model. This model relies on data from the National and International Visitor Surveys. The aggregate sample sizes of these surveys for the 2007/08 financial year are provided here.

Tourism region	Total tourism expenditure		TRA data	Total output	Economic importance of tourism
	Purchaser's prices[18], $m	Basic prices[19], $m	Sample size[20]	Basic prices, $m	%
Vic (continued)					
Murray East	121	109	173	3,477	3.1
Goulburn	270	243	397	7,911	3.1
Bendigo Loddon	334	302	512	9,861	3.1
Western Grampians	110	99	254	3,410	2.9
Gippsland	452	408	722	15,017	2.7
Geelong	526	475	849	18,367	2.6
Peninsula	634	572	1,018	23,618	2.4
Melbourne	9,120	8,233	10,570	357,108	2.3
Macedon	86	78	199	6,407	1.2
Wimmera	19	17	51	1,449	1.2
Melbourne East	316	285	568	26,754	1.1
Qld					
Whitsundays	685	502	511	2,834	17.7
Tropical North Queensland	2,761	2,024	3,692	20,902	9.7
Sunshine Coast	2,458	1,802	1,420	27,056	6.7
Outback	409	299	204	4,614	6.5
Gold Coast	4,528	3,319	4,905	51,870	6.4
Fraser Coast	567	416	543	7,607	5.5
Bundaberg	346	254	283	6,292	4.0
Central Queensland	874	640	457	19,484	3.3
Northern	818	600	490	20,344	2.9
Darling Downs	586	429	501	18,058	2.4
Mackay	458	336	249	14,558	2.3
Brisbane	5,068	3,715	4,462	193,635	1.9

Tourism region	Total tourism expenditure		TRA data	Total output	Economic importance of tourism
	Purchaser's prices[21], $m	Basic prices[22], $m	Sample size[23]	Basic prices, $m	%
SA					
Kangaroo Island	63	50	126	358	14.1
Clare Valley	78	62	190	1,074	5.8
Yorke Peninsula	177	141	520	2,921	4.8
Eyre Peninsula	282	225	385	4,720	4.8
Fleurieu Peninsula	357	285	919	6,160	4.6
Outback SA	61	48	84	1,077	4.5
Flinders Ranges	187	149	355	3,353	4.4
Riverland	123	99	234	2,379	4.1
Murraylands	105	84	361	2,033	4.1
Barossa	156	124	335	3,263	3.8
Limestone Coast	251	200	530	6,128	3.3
Adelaide	2,325	1,855	3,198	107,251	1.7
Adelaide Hills	88	70	250	7,633	0.9
WA					
Australia's Coral Coast	512	379	619	5,531	6.9
Australia's North West	703	520	581	9,301	5.6
Australia's South West	1,306	966	2482	20,234	4.8
Australia's Golden Outback	393	291	795	10,898	2.7
Experience Perth	4,474	3,310	8,470	205,530	1.6
Tas					
West Coast	102	71	136	439	16.2
East Coast	129	90	430	621	14.6
Launceston and Tamar Valley	530	371	923	8,268	4.5
Southern	125	87	605	2,137	4.1
Hobart & Surrounds	914	640	1,237	18,659	3.4
North West	323	226	775	7,877	2.9
Northern	72	50	337	2,062	2.4

[21] Purchaser's prices – See Detailed methodology (Appendix A) and Glossary.
[22] Basic prices – See Detailed methodology (Appendix A) and Glossary.
[23] The estimates for tourism expenditure are derived by TRA using their regional tourism expenditure allocation model. This model relies on data from the National and International Visitor Surveys. The aggregate sample sizes of these surveys for the 2007/08 financial year are provided here.

Tourism region	Total tourism expenditure		TRA data	Total output	Economic importance of tourism
	Purchaser's prices[21], $m	Basic prices[22], $m	Sample size[23]	Basic prices, $m	%
NT					
Central	411	307	756	1,239	24.8
Alice Springs	241	180	278	3,368	5.3
Top End	237	177	466	3,575	5.0
Darwin	791	591	886	19,831	3.0
ACT					
Canberra	1,464	1,058	1,580	41,428	2.6

Table B2: Economic importance of tourism estimates ranked by importance

Rank	Tourism region	State	Economic importance (%)
1	Central	NT	24.78
2	Phillip Island	Vic	18.70
3	Whitsundays	Qld	17.71
4	Snowy Mountains	NSW	17.08
5	West Coast	Tas	16.20
6	East Coast	Tas	14.57
7	Spa Country	Vic	14.34
8	Kangaroo Island	SA	14.07
9	Tropical North Queensland	Qld	9.68
10	Lakes	Vic	9.21
11	Mid North Coast	NSW	8.75
12	Upper Yarra	Vic	7.66
13	Central Murray	Vic	7.36
14	High Country	Vic	7.23
15	Australia's Coral Coast	WA	6.85
16	Sunshine Coast	Qld	6.66
17	Outback	Qld	6.49
18	Gold Coast	Qld	6.40
19	Western	Vic	6.20
20	Northern Rivers	NSW	6.10
21	Clare Valley	SA	5.78
22	Australia's North West	WA	5.59
23	Fraser Coast	Qld	5.46
24	The Murray	NSW	5.45
25	Outback NSW	NSW	5.44
26	South Coast	NSW	5.35
27	Alice Springs	NT	5.34
28	Central NSW	NSW	5.09
29	Top End	NT	4.95
30	New England North West	NSW	4.83
31	Yorke Peninsula	SA	4.82
32	Australia's South West	WA	4.77

Rank	Tourism region	State	Economic importance (%)
33	Eyre Peninsula	SA	4.76
34	Fleurieu Peninsula	SA	4.62
35	Outback SA	SA	4.49
36	Launceston and Tamar Valley	TAS	4.49
37	Flinders Ranges	SA	4.44
38	Blue Mountains	NSW	4.40
39	Riverland	SA	4.14
40	Murraylands	SA	4.13
41	Southern	Tas	4.09
42	Bundaberg	Qld	4.03
43	Mallee	Vic	3.84
44	Barossa	SA	3.80
45	Ballarat	Vic	3.79
46	Riverina	NSW	3.59
47	Central Highlands	Vic	3.45
48	Hobart and Surrounds	Tas	3.43
49	Central Queensland	Qld	3.29
50	Limestone Coast	SA	3.27
51	Central Coast	NSW	3.23
52	Murray East	Vic	3.13
53	Goulburn	Vic	3.08
54	Bendigo Loddon	Vic	3.06
55	Darwin	NT	2.98
56	Northern	Qld	2.95
57	Western Grampians	Vic	2.90
58	Hunter	NSW	2.87
59	North West	Tas	2.87
60	Gippsland	Vic	2.72
61	Australia's Golden Outback	WA	2.67
62	Geelong	Vic	2.59
63	Capital Country	NSW	2.58
64	Canberra	ACT	2.55
65	Northern	Tas	2.43

Rank	Tourism region	State	Economic importance (%)
66	Peninsula	Vic	2.42
67	Sydney	NSW	2.41
68	Darling Downs	Qld	2.38
69	Melbourne	Vic	2.31
70	Mackay	Qld	2.31
71	Brisbane	Qld	1.92
72	Adelaide	SA	1.73
73	Experience Perth	WA	1.61
74	Macedon	Vic	1.21
75	Wimmera	Vic	1.17
76	Melbourne East	Vic	1.07
77	Adelaide Hills	SA	0.92

Glossary of terms

Basic price	The amount receivable by the producer from the purchaser for a unit of a good or service produced as output, minus any tax payable plus any subsidy receivable, on that unit as a consequence of its production or sale. It excludes any transport charges invoiced separately by the producer.
International Visitor Survey (IVS)	Profiles the characteristics, travel behaviour and expenditure of international visitors to Australia. Summary information from the IVS is published quarterly. Unpublished data are available on request from Tourism Research Australia. The IVS has been conducted every year since 1981, except for 1982 and 1987.
Total (state) output	Consists of the goods and services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use.
National Visitor Survey (NVS)	Profiles the Australian traveller, both within Australia and overseas. Summary information from the NVS is published quarterly. Unpublished data are available on request from Tourism Research Australia. The NVS has been conducted since January 1998, when it replaced the Domestic Tourism Monitor (DTM).
Purchaser's price	The amount paid by the purchaser, excluding any deductible tax, in order to take delivery of a unit of a good/service at the time and place required by the purchaser. The purchaser's price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place.
Statistical Local Area (SLA)	A geographic area defined by the Australian Standard Geographical Classification (ASGC). The ASGC is used by the ABS for the collection and dissemination of geographically classified statistics. In aggregate, SLAs cover the whole of a state or territory without gaps or overlaps. See ABS cat no. 1216.0 (2008) for more information.
Total personal income	The sum of personal income from the following sources: • Wage and salary • Own unincorporated business • Investment • Superannuation and annuities • Other income (excluding government pensions and allowances).

Total tourism expenditure	The sum of tourism expenditure by domestic day, domestic overnight and international visitors.
Tourism consumption	Consists of tourism expenditure plus imputed consumption by resident and non-resident visitors on tourism-related products, including those sold at prices that are not economically significant.
Tourism expenditure	Consists of the amount paid by a visitor or on behalf of a visitor for and during his/her trip and stay at the destination.
(State) Tourism output	The value of goods and services, at basic prices, which are consumed by visitors and produced in the state/territory by industries in a direct relationship with visitors.
Tourism region	A region geographically defined by the ABS *Tourism Region Maps and Concordance Files*. See Reference List.

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