

REGIONAL ECONOMIC CONTRIBUTION OF TOURISM DESTINATIONS IN QUEENSLAND



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STCRC Centre for Economics and Policy

Regional Economic Contribution of Tourism Destinations in Queensland

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EXECUTIVE SUMMARY

Tourism often produces substantial economic contributions in certain regions of a national economy and tourism activity tends to be unevenly concentrated within countries. Satellite accounts allow an understanding of the size and role of activities which are not separately identified in the conventional national accounting framework. They allow an expansion of the national accounts for selected areas of interest while maintaining the concepts and structures of the core accounts. In a Tourism Satellite Account (TSA) all of the tourism associated economic activity is identified in a separate but related account, that is, an account which is a satellite of the core national accounts. TSA thus enable the relationships between tourism and other economic activity to be explored within the national accounts framework, extracting all the tourism-related economic activity which is included in the national accounts but not identified as tourism.

The extensive involvement of governments in tourism planning, infrastructure provision and marketing at a state, regional or local level has led to a strong demand for better economic statistics to be made available at the state or regional level. A national TSA cannot help us to determine the importance of tourism to different sub-regions or provide any guidance as to its potential as a tool for regional development in particular cases (Jones et al. 2003). Worldwide, regional governments are developing tourism plans to maximise the opportunities for income and employment growth resulting from an expanding tourism industry. The forms of planning implemented must depend on the estimated net benefits on local economies of different strategies. In such cases, a national level TSA may be of much less relevance to regional destination management organisations and local businesses than a regional TSA.

In this report, regional tourism statistics for Queensland have been developed using a process designed to reconcile three levels of tourism jurisdiction: the national, state and regional tourism destination. Thus aggregating data from a lower level will equal the data at the higher level. Although we attempt to follow closely the standard TSA format recommended in the international guidelines (TSA-RMF 2008), there are no internationally agreed guidelines or standards for a TSA at the regional level. This is because there is not an official system of accounts at the regional level for a 'regional TSA' to be a 'satellite to'. Hence our use of the term Tourism Regional Economic Contribution (TREC) is a more appropriate descriptor of the accounts presented in this report. However, as the term TSA is more widely used and understood, the 'regional TSA' terminology has also been used in places in this report and in these instances it can be understood as being interchangeable with TREC.

This report covers three years of data, 2003–04, 2006–07 and 2007–08. The construction of TREC in this report follows the methodology outlined in the previous scoping study (Pham, Dwyer & Spurr, 2009). Tourism Research Australia divides tourism areas in Queensland into twelve destinations. These are Brisbane, Gold Coast, Sunshine Coast, Hervey Bay/Maryborough, Darling Downs, Bundaberg, Fitzroy, Mackay, Whitsundays, Northern, Tropical North Queensland and the Outback.

For each region estimates are provided for several key performance measures ranging over the region as a whole and by type of tourism (characteristic or connected) industry. These are tourism gross regional product, regional tourism consumption, regional tourism output at basic prices, net taxes on tourism products by region, tourism regional gross value added and tourism employment.

It is found that Brisbane, the Gold Coast, Tropical North Queensland and the Sunshine Coast are the largest producers of tourism goods and services to the Queensland economy in terms of both value added and employment. In the case of Brisbane this is derived from a relatively even mixture of expenditure contribution of visitors from overseas, interstate, other regions of Queensland, and from within Brisbane itself. The Gold Coast and the Sunshine Coast have similar patterns to one another, in which both receive a larger expenditure contribution from domestic than from overseas visitors with a small share from their own residents. In contrast, the expenditure contribution of overseas visitors in Tropical North Queensland is very significant compared to other sources.

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For other smaller destinations, the main tourism expenditure contribution is from domestic, including inter-state, other regions of Queensland, and also from within those small destinations as well.

This report produces the first set of estimates of tourism's economic contribution at the destination level, in effect a regional TSA. The construction of these estimates should not be considered the end of the process but rather as the beginning of an ongoing process to unfold the importance of the tourism sector at a level relevant to policy makers. Regional estimates of tourism's economic contribution, or 'regional TSA' can be expected to generate policy relevant insights so that tourism activity can be adequately nurtured and stimulated at the right time and right place for sustainable regional economic development. This report presents the most fundamental regional tourism statistics which constitute the core of tourism satellite accounts at both national and state level. Although set in the context of regional Queensland, the approach adopted in this report can serve as a general guideline for further development of tourism statistics in other states of Australia and elsewhere.

Introduction

Tourism Satellite Accounts (TSA) have been developed and used widely at the national level for many countries over the past decades. Examples are such as Alaska (Sacks, 2004), Austria (Statistics Austria and WIFO¹, 2001), Australia (Australian Bureau of Statistics, 2000, 2009), Canada (Barber-Dueck and Kotsovos, 2005; Statistics Canada, 2004), India (Shukla, 2006), The Philippines (Virola, Remulla, Amoro and Say, 2001) and New Zealand (Statistics New Zealand, 2005). In order to provide consistency for comparing TSA across countries and over time, the Recommended Methodological Framework (RMF) was developed and endorsed internationally by the United Nations World Tourism Organization (UNWTO), the OECD, EUROSTAT and the United Nations Statistics Commission (Spurr, 2006). The development of national TSAs has been further advanced down to the state or provincial level in a few countries where the need for such data is important and relevant to policy making. Some examples include Australia (Office of Economic and Statistical Research [OESR], 2001a, 2001b and 2006; Ho, Spurr, Pambudi, Forsyth, Dwyer and Hoque, 2008a, 2008b and 2008c; Spurr, Ho, Forsyth, Dwyer, Pambudi and Hoque, 2007a and 2007b), Canada (Barber-Dueck and Kotsovos, 2003), and Denmark (Zhang, 2005).

Tourism often produces substantial economic contributions in certain regions of a national economy and tourism activity tends to be unevenly concentrated within countries. A national TSA cannot help us to determine the importance of tourism to different sub-regions or provide any guidance as to its potential as a tool for regional development in particular cases (Jones and Munday, 2003). Worldwide, regional governments are developing tourism plans to maximise the opportunities for income and employment growth resulting from an expanding tourism industry. The forms of planning implemented must depend on the estimated net benefits on local economies of different strategies. In such cases, a national level TSA may be of much less relevance to regional destination management organisations and local businesses than a regional TSA.

At the national level in Australia, tourism is of substantial economic significance:

‘Tourism is one of Australia’s most important industry sectors, employing almost half a million Australians. Tourism is also our largest services export, worth \$23.6 billion a year’ (Australian Department of Resources, Energy and Tourism [DRET], 2009, p. 2).

Not surprisingly, the extensive involvement of governments in tourism planning, infrastructure provision and marketing at a state, regional or local level has led to a strong demand for better economic statistics to be made available at the state or regional level. Yet, only a small number of countries, in particular Canada, Spain, Norway, and Australia, have attempted to develop TSA for regions (Jones and Munday 2007; Pham, Dwyer and Spurr, 2009). Discussion on adapting the TSA to sub-national levels is encouraged in the international guidelines. (TSA RMF: 2008 Annex 7). The reasons for this include:

- the worldwide trend towards the de-centralisation of political power and destination management, with the associated need to improved data for decision making at the local level;
- the varied nature of tourism activities, which can potentially benefit rural areas seeking to diversify;
- the unequal geographical distribution and characteristics of tourism activity within the national territory for both demand and supply sides, leading to additional requirements for tourism statistics at the various sub-national levels;
- the growing interest of tourism-related businesses to understand the interrelation of their activity with other industries in an economy and their main determinants and seasonal cycles;
- the need to improve the allocation of resources in national and local economies, which can only be achieved by upgrading quantitative references and measuring economic impacts.

Since the contribution of tourism is not distributed evenly among regions or tourism destinations in Australia, tourism development strategies need to be different among the different destinations. As a result, tourism statistics, as inputs into the policy-making at the destination level, are even more crucial than those at the national and state level.

¹ Austrian Institute of Economic Research

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Tourism statistics for regional economies in Queensland were developed some years ago by Office of Economic and Statistic Research (OESR) (2001c, 2002). These statistics are mostly time series on tourism expenditure data and just one year (1998–99) of data related to the producing industries in the tourism destinations, which are based on the boundary definition of the Australian Bureau of Statistics (ABS) and Bureau of Tourism Research (BTR). Also notably, the classification of the producing industries was based on the standard ABS industry classification, not those defined in the RMF.

In this report, we attempt to derive tourism statistics explicitly by reference to the standards recommended in the RMF. Regional tourism statistics have been developed using a process designed to reconcile three levels of tourism jurisdiction: the national, state and tourism destination. Thus aggregating data from a lower level will equal the data at the higher level. Although we attempt to follow closely the standard TSA format recommended in the RMF, there are no internationally agreed guidelines or standards for a TSA at the regional level. This is because there is not an official system of accounts at the regional level for a ‘regional TSA’ to be a ‘satellite to’. Furthermore, there are some conceptual issues related to the regional level that the standards in the RFM have not as yet addressed. So, while our resultant tourism statistics in this report are specifically designed to be as consistent as possible with the TSA:RMF methodology, they are not claimed as a regional TSA as such because we are conscious of concerns by the World Tourism Organisation (UNWTO) about correct usage of the TSA terminology. Hence our use of the term Tourism Regional Economic Contribution (TREC) is a more appropriate descriptor of the accounts presented in this report. However, as the term TSA is more widely used and understood, the ‘regional TSA’ terminology has also been used in places in this report and in these instances it can be understood as being interchangeable with TREC.

This report covers three years of data, 2003–04, 2006–07 and 2007–08. The construction of TREC in this report follows the methodology outlined in the previous scoping study (Pham et al., 2009) therefore a full section on methodology will not be included in this report. Earlier version of this scoping study can also be found from <http://www.crctourism.com.au/BookShop/BookDetail.aspx?d=565>.

Data Sources and Methodology

The construction of TREC requires data from a few sources as indicated below.

1. State TSA data for 2003–04 (Spurr et al., 2007a), 2006–07 (Ho et al., 2008a) and 2007–08 (Pambudi, Ho, Spurr, Forsyth, Dwyer and Hoque, 2009): These are used as the state control targets for those statistics to be derived at the tourism destination level.
2. Tourism expenditure data from Tourism Research Australia (TRA): These include expenditure of domestic day visitors, overnight domestic visitors and overseas visitors for all twelve destinations in Queensland. This set of data is used to determine the distribution of the state tourism consumption (TSA on the demand side) into the destination level.
3. The TERM² database (Horridge, Madden & Wittwer, 2003): the regions in TERM are not all identical to tourism destinations defined by TRA data. However, as they are broadly the same, this TERM database is used to provide the information on the cost structure of the producing tourism sectors in all twelve destinations in Queensland (TSA on the supply side).

In short, data in (2) and (3) are used to disaggregate state TSA in (1) into corresponding TSA data for all tourism destinations. It would have been preferable if regional input–output (I-O) data were available for each year corresponding to the state TSA (Pham et al., 2009). However, such I-O databases are not readily available and the time requirement to derive them is well beyond the scope of this report.

A pragmatic approach has therefore been adopted to move away from *specific year* I-O databases toward the use of a more ‘representative’ structure of an I-O database within the whole period, 2003–04 to 2007–08. In this case, we have adopted the 2004–05 I-O database from the TERM model as a representative structure for all three years. The advantage of this approach is that it enables us to develop regional TSA, or TREC, for all three years for which state TSAs are available. A major limitation of this approach however is that statistics on the regional

² TERM stands for The Enormous Regional Model. It is a regional Computable General Equilibrium (CGE) model for at the sub-statistical divisions in Australia. The most recent database of the TERM model is 2004–05.

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economies such as outputs, value added and employment numbers for individual *conventional* industries in a region are *not available for direct comparison* with tourism statistics in the region. In essence, this report can be viewed as merely adding the regional dimension to the state TSA in order to highlight the contribution of destinations to the state TSA figures.

An Overview of Regional Tourism Development over Time

Tourism Research Australia divides tourism areas in Queensland into twelve destinations as indicated in Figure 1. The boundaries of these regions are not based on the sizes of their economies or areas, but rather on each region's tourist attraction or characteristics. Therefore the level of contribution of tourists' consumption from each region to the state will vary.

Figure 2 represents the shares of each region in total state tourism consumption over the three years, 2003–04, 2006–07 and 2007–08. As seen, Brisbane, Gold Coast, Tropical North Queensland and the Sunshine Coast are the four major destinations in the State. Brisbane and The Gold Coast are in fact the most well known destinations with their tourism consumption shares substantially larger than all other regions of Queensland. Of the two, Brisbane has become more popular over the period with its share of tourism consumption steadily increasing over time, while The Gold Coast and Tropical North of Queensland have lost a small proportion of their market shares³.

Figure 1: Tourism Destinations in Queensland

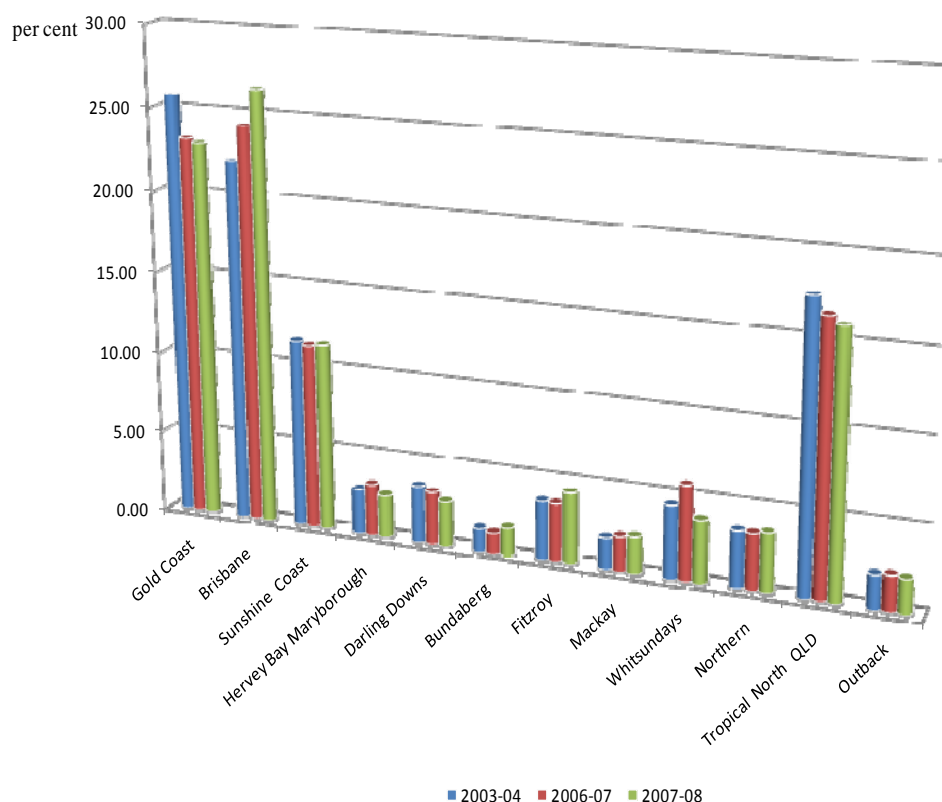


Source: TRA, 2008

³ Data in this report are in current prices therefore care should be taken when comparing expenditure over time.

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Figure 2: Regional Shares in Total Queensland Tourism Consumption—An Overview



Tourism Gross Regional Product

Tourism gross regional product (TGRP) is tourism gross value added plus taxes paid less subsidies received on tourism related products as these are reflected in prices that visitors actually pay. As subsidies are often less than taxes imposed on products, TGRP will generally have a higher value than tourism value added.

A tax or subsidy on a product is payable per unit of a good or service. The tax or subsidy may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax or subsidy on a product usually becomes payable when the product is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation (ABS, 2009, p. 42).

As Table 1 shows in 2007–08 tourism gross regional product was \$9.192 million. Of this gross regional product, 30.94 per cent was associated with tourism in Brisbane, followed by the Gold Coast (21.19%), Tropical North Queensland (14.19%), and the Sunshine Coast (11.56%).

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Table 1: Tourism Gross Regional Product

(\$ million)	2003-04	2006-07	2007-08
Gold Coast	1,948	1,897	1,948
Brisbane	2,202	2,590	2,844
Sunshine Coast	958	973	1,062
Hervey Bay/Maryborough	189	231	222
Darling Downs	287	285	270
Bundaberg	168	194	202
Fitzroy	266	301	343
Mackay	235	289	261
Whitsundays	243	305	253
Northern	292	305	336
Tropical North QLD	1,192	1,277	1,304
Outback	131	138	147
Total	8,112	8,785	9,192

(per cent)	2003-04	2006-07	2007-08
Gold Coast	24.02	21.60	21.19
Brisbane	27.15	29.48	30.94
Sunshine Coast	11.80	11.07	11.56
Hervey Bay/Maryborough	2.33	2.63	2.41
Darling Downs	3.54	3.25	2.94
Bundaberg	2.07	2.21	2.19
Fitzroy	3.27	3.43	3.74
Mackay	2.90	3.29	2.84
Whitsundays	3.00	3.47	2.75
Northern	3.59	3.47	3.65
Tropical North QLD	14.70	14.54	14.19
Outback	1.62	1.57	1.60
Total	100.0	100.0	100.0

Regional Tourism Consumption

State TSA tourism consumption data cover all expenditure consumed in the state economy, including expenditure of both overseas and domestic visitors. A small proportion, up to 3 per cent, of expenditure by domestic travellers was spent for outbound trips (Tables 2, 4, and 6). As this is a very small proportion and TRA data for this category are not available at the destination level, the derivation of the outbound expenditure data for all tourism destinations is not calculated. This is not expected to distort the overall picture of tourism consumption in the regions. As a result, this section will present the disaggregation of expenditure for domestic trips only.

It is interesting to find that at the state level, over time, Queensland has nearly constant shares of domestic and overseas tourists' expenditure in total tourism consumption within the state, approximately 38 per cent from within Queensland, 36 per cent from inter-state and 25 per cent from overseas. However, at the destination level, the expenditure compositions of visitor types vary significantly across regions. Tropical North Queensland relies heavily on expenditure from overseas visitors (45%) and inter-state (33%). The Gold Coast relies more on inter-state than overseas visitors' expenditure although these together constitute the main source of revenue to the

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region. In a similar pattern to the Gold Coast, the Sunshine Coast relies even more on domestic than overseas, particularly on visitors from other regions within Queensland. Residents in the Gold Coast and the Sunshine Coast do not contribute much to the total tourism consumption of their regions (this refers to consumption by residents travelling within their own region who meet the distance travelled and purpose of visit criteria for classification as a visitor). Brisbane has a more evenly mixed expenditure composition. Residents in Brisbane contribute a relatively significant amount to total tourism consumption in the Brisbane City.

Destinations that attract only a small proportion of overseas tourists are Darling Downs, Mackay, Bundaberg, Fitzroy and the Outback. Among these regions, the Outback seems to attract visitors more from within Queensland (including the Outback itself) than from interstate. There seems to be a shift in preference for travelling of Queensland residents toward the Outback as compared to visitors from interstate, expenditure shares for Queensland residents are increasing over time.

Table 8 presents the net taxes on tourism products by destination. As expected from Figure 2, Brisbane, Gold Coast, Tropical North Queensland and the Sunshine Coast are the four major tax contributors, respectively.

Tables 9 to 14 present tourism consumption in more detail by destination and tourism commodity. Throughout the three years of data presented here, shopping, takeaway and restaurant meals, accommodation, and long distance passenger transportation are commodities consumed the most among all commodities. Some of the more important findings may be summarised:

Table 9 shows that in 2003–04 tourism consumption was \$18,655 million. One quarter of all tourism consumption in Queensland (25.7%) was undertaken on the Gold Coast, followed by Brisbane (22.1%), Tropical North Queensland (17.3%), and the Sunshine Coast (11.5%). Overall, the main items consumed were shopping (16.7%), takeaway and restaurant meals (16.2%), long distance passenger transportation (14.9%) and accommodation services (10.8%).

Table 11 shows that in 2006–07 tourism consumption was \$20,969 million. The largest tourism consumption in this year occurs in Brisbane (24.2%) followed by The Gold Coast (23.2%), Tropical North Queensland (16.4%) and the Sunshine Coast (11.3%). Thus Brisbane is the only region in the top four to experience increased tourism consumption in 2006–07 compared with 2003–04. Overall, the main items consumed were shopping (15.4%), takeaway and restaurant meals (15.3%), long distance passenger transportation (13.7%) and accommodation services (11.8%). Of these four main consumption items, accommodation services is the only one to register an increased share in the period 2003–04 to 2006–07.

Table 13 shows that in 2007–08 tourism consumption was \$21,887 million. The largest tourism consumption in this year is again Brisbane (26.4%) followed by The Gold Coast (23.0%), Tropical North Queensland (16.0%) and the Sunshine Coast (11.5%). Thus the share of Brisbane and the Sunshine Coast in tourism consumption increased in 2007–08 compared with 2006–07. Brisbane is the only region in the top four to register an increase in tourism consumption between 2003–04 and 2007–08. Overall, the main items consumed in 2007–08 were takeaway and restaurant meals (15.7%), shopping (15.3%), long distance passenger transportation (13.2%) and accommodation services (12.4%). Of these four main consumption items, long distance passenger transportation and accommodation services were the only ones to register an increase in the overall period 2003–04 to 2007–08.

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Table 2: Queensland Tourism Consumption 2003–04 (\$m) at Tourism State Level

Domestic Trips				Outbound	Total
Inbound	Intrastate	Interstate	Total Domestic		
4,679	7,254	6,721	18,655	516	19,171
24.4%	37.8%	35.1%		2.7%	100%

Source: Spurr et al., 2007

Table 3: Tourism Consumption 2003–04 at Tourism Regional Level

(\$ million)	Inbound	Intra-region	Inter-region	Inter-state	Total
Gold Coast	1,216	234	987	2,358	4,796
Brisbane	1,139	707	981	1,286	4,114
Sunshine Coast	228	164	825	929	2,146
Hervey Bay/Maryborough	77	121	234	81	513
Darling Downs	32	179	327	114	653
Bundaberg	23	80	104	52	258
Fitzroy	57	258	250	116	680
Mackay	25	126	135	78	365
Whitsundays	219	21	171	423	834
Northern	124	129	273	127	653
Tropical North QLD	1,524	400	320	1,011	3,255
Outback	16	85	142	145	388
Total	4,679	2,505	4,749	6,721	18,655

(per cent)	Inbound	Intra-region	Inter-region	Inter-state	Total
Gold Coast	25.35	4.89	20.59	49.17	100
Brisbane	27.68	17.20	23.86	31.26	100
Sunshine Coast	10.62	7.65	38.46	43.27	100
Hervey Bay/Maryborough	14.92	23.65	45.57	15.86	100
Darling Downs	4.95	27.45	50.10	17.51	100
Bundaberg	8.98	30.80	40.21	20.02	100
Fitzroy	8.37	37.90	36.70	17.03	100
Mackay	6.77	34.57	37.14	21.51	100
Whitsundays	26.24	2.53	20.48	50.75	100
Northern	19.05	19.71	41.73	19.51	100
Tropical North QLD	46.82	12.30	9.82	31.06	100
Outback	4.09	21.87	36.67	37.37	100
Total	25	13	25	36	100

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Table 4: Queensland Tourism Consumption 2006–07 (\$m, per cent) at Tourism State Level

Domestic Trips				Outbound	Total
Inbound	Intrastate	Interstate	Total Domestic		
5,214	8306.8	7,448	20,969	603.1	21,572
24.2%	38.5%	34.5%		2.8%	100%

Source: Van Ho et al., 2008

Table 5: Tourism Consumption 2006–07 at Tourism Regional Level

(\$ million)	Inbound	Intra-region	Inter-region	Inter-state	Total
Gold Coast	1,154	190	1,191	2,330	4,864
Brisbane	1,586	832	1,023	1,633	5,075
Sunshine Coast	293	241	1,011	830	2,375
Hervey Bay/Maryborough	95	107	305	162	669
Darling Downs	61	213	255	148	677
Bundaberg	30	63	132	36	261
Fitzroy	71	317	224	144	756
Mackay	35	131	187	98	452
Whitsundays	185	62	279	688	1,214
Northern	129	179	273	143	724
Tropical North QLD	1,548	432	312	1,155	3,446
Outback	29	130	218	80	456
Total	5,214	2,896	5,411	7,448	20,969

(per cent)	Inbound	Intra-region	Inter-region	Inter-state	Total
Gold Coast	23.72	3.90	24.48	47.91	100
Brisbane	31.26	16.40	20.16	32.19	100
Sunshine Coast	12.33	10.13	42.59	34.95	100
Hervey Bay/Maryborough	14.14	15.97	45.64	24.25	100
Darling Downs	8.94	31.53	37.64	21.90	100
Bundaberg	11.46	24.16	50.55	13.82	100
Fitzroy	9.35	41.91	29.70	19.04	100
Mackay	7.78	29.03	41.47	21.72	100
Whitsundays	15.25	5.08	22.99	56.68	100
Northern	17.82	24.71	37.73	19.74	100
Tropical North QLD	44.91	12.53	9.04	33.51	100
Outback	6.28	28.46	47.80	17.46	100
Total	25	14	26	36	100

Regional Economic Contribution of Tourism Destinations in Queensland

Table 6: Queensland Tourism Consumption 2007–08 (\$m) at Tourism State Level

Domestic Trips				Outbound	Total
Inbound	Intra-state	Inter-state	Total Domestic		
5,474	8,646	7,767	21,887	678	22,564
24.3%	38.3%	34.4%		3.0%	100%

Source: Pambudi et al., 2009

Table 7: Tourism Consumption 2007–08 at Tourism Regional Level

(\$ million)	Inbound	Intra-region	Inter-region	Inter-state	Total
Gold Coast	1,191	162	1,177	2,497	5,026
Brisbane	1,948	1,007	1,243	1,583	5,781
Sunshine Coast	246	187	1,152	922	2,508
Hervey Bay/Maryborough	93	106	245	126	570
Darling Downs	59	177	281	86	602
Bundaberg	30	77	174	82	364
Fitzroy	83	356	325	193	957
Mackay	34	146	151	166	496
Whitsundays	201	40	213	387	842
Northern	114	199	266	214	793
Tropical North QLD	1,452	317	357	1,367	3,493
Outback	23	94	194	145	455
Total	5,474	2,868	5,778	7,767	21,887

(per cent)	Inbound	Intra-region	Inter-region	Inter-state	Total
Gold Coast	23.69	3.21	23.42	49.68	100
Brisbane	33.70	17.42	21.50	27.38	100
Sunshine Coast	9.81	7.47	45.94	36.78	100
Hervey Bay/Maryborough	16.29	18.64	42.94	22.13	100
Darling Downs	9.72	29.38	46.62	14.28	100
Bundaberg	8.29	21.25	47.89	22.56	100
Fitzroy	8.66	37.22	33.97	20.15	100
Mackay	6.83	29.32	30.50	33.35	100
Whitsundays	23.92	4.79	25.26	46.02	100
Northern	14.38	25.07	33.56	27.00	100
Tropical North QLD	41.57	9.07	10.22	39.14	100
Outback	5.08	20.60	42.55	31.77	100
Total	25	13	26	35	100

Regional Economic Contribution of Tourism Destinations in Queensland

Table 8: Aggregate Net Taxes on Tourism Products by Region

(\$ million)	2003-04	2006-07	2007-08
Gold Coast	364	364	369
Brisbane	309	368	400
Sunshine Coast	189	207	237
Hervey Bay/Maryborough	53	70	63
Darling Downs	74	81	75
Bundaberg	32	32	41
Fitzroy	67	93	94
Mackay	34	40	48
Whitsundays	53	69	55
Northern	57	70	83
Tropical North QLD	204	217	215
Outback	42	46	49
Total	1,478	1,657	1,729
(per cent)	2003-04	2006-07	2007-08
Gold Coast	24.65	21.97	21.34
Brisbane	20.89	22.19	23.17
Sunshine Coast	12.78	12.48	13.71
Hervey Bay/Maryborough	3.62	4.25	3.62
Darling Downs	5.02	4.87	4.35
Bundaberg	2.13	1.94	2.37
Fitzroy	4.52	5.64	5.42
Mackay	2.30	2.39	2.76
Whitsundays	3.57	4.19	3.21
Northern	3.89	4.19	4.80
Tropical North QLD	13.83	13.10	12.41
Outback	2.81	2.79	2.86
Total	100	100	100

Regional Economic Contribution of Tourism Destinations in Queensland

Table 9: Total Tourism Consumption by Destination and Expenditure Item 2003–04 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	83	65	28	39	12	1	1	12	89	0	162	22	514
Taxi fares	37	40	19	1	2	2	3	4	2	7	33	2	150
Long distance passenger transportation	745	760	189	27	27	16	53	53	95	81	697	36	2,781
Motor vehicle hire and lease	57	53	26	1	2	3	6	5	3	9	52	2	218
Accommodation services	582	324	335	49	46	16	46	21	120	64	367	40	2,012
Takeaway and restaurant meals	863	447	564	85	88	28	86	39	168	108	474	72	3,021
Shopping (including gifts and souvenirs)	798	803	330	76	166	46	164	74	74	112	444	36	3,123
Local area passenger transportation	29	29	7	2	2	1	3	2	3	4	30	1	114
Repair and maintenance of motor vehicles	5	5	13	5	1	0	3	1	14	1	14	28	91
Fuel (petrol, diesel)	176	228	122	61	86	46	67	34	16	50	84	53	1,023
Food products	385	363	221	52	74	25	66	41	69	73	245	30	1,644
Alcoholic beverages and other beverages	258	223	90	30	40	9	38	26	49	30	129	19	942
Motor vehicles, caravans, boats, etc.	35	77	17	24	16	18	16	5	12	10	27	5	261
Recreational, cultural and sports services	298	164	62	19	19	3	27	12	47	23	161	3	839
Gambling and betting services	97	60	19	7	9	2	11	5	15	9	51	2	288
Education	113	87	15	4	6	1	5	1	10	8	96	1	348
Actual and imputed rent on holiday houses	37	159	20	8	19	8	28	12	12	19	18	11	354
Other tourism goods and services	196	227	69	24	37	32	58	18	34	43	171	25	934
Total	4,796	4,114	2,146	513	653	258	680	365	834	653	3,255	388	18,655

Regional Economic Contribution of Tourism Destinations in Queensland

Table 10: Shares of Tourism Consumption by Destination and Expenditure Item 2003–04 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	16.2	12.7	5.4	7.5	2.3	0.2	0.2	2.3	17.4	0.0	31.5	4.3	100.0
Taxi fares	24.5	26.9	12.6	0.4	1.1	1.2	1.9	2.4	1.2	4.8	21.8	1.3	100.0
Long distance passenger transportation	26.8	27.3	6.8	1.0	1.0	0.6	1.9	1.9	3.4	2.9	25.1	1.3	100.0
Motor vehicle hire and lease	26.4	24.3	11.9	0.5	0.9	1.2	2.5	2.1	1.5	4.2	23.6	1.0	100.0
Accommodation services	28.9	16.1	16.7	2.4	2.3	0.8	2.3	1.0	6.0	3.2	18.2	2.0	100.0
Takeaway and restaurant meals	28.5	14.8	18.7	2.8	2.9	0.9	2.8	1.3	5.6	3.6	15.7	2.4	100.0
Shopping (including gifts and souvenirs)	25.6	25.7	10.6	2.4	5.3	1.5	5.2	2.4	2.4	3.6	14.2	1.2	100.0
Local area passenger transportation	25.5	25.3	6.5	1.7	1.4	1.0	2.3	2.2	2.9	3.7	26.8	0.8	100.0
Repair and maintenance of motor vehicles	6.0	5.1	14.2	5.4	1.0	0.2	3.5	0.6	16.0	1.6	15.1	31.2	100.0
Fuel (petrol, diesel)	17.2	22.3	11.9	6.0	8.4	4.5	6.6	3.3	1.5	4.9	8.2	5.2	100.0
Food products	23.4	22.1	13.4	3.1	4.5	1.5	4.0	2.5	4.2	4.5	14.9	1.8	100.0
Alcoholic beverages and other beverages	27.4	23.7	9.6	3.2	4.3	0.9	4.0	2.8	5.2	3.2	13.7	2.0	100.0
Motor vehicles, caravans, boats, etc.	13.6	29.6	6.7	9.1	6.0	6.8	6.1	1.8	4.6	3.8	10.2	1.9	100.0
Recreational, cultural and sports services	35.5	19.5	7.4	2.3	2.3	0.3	3.3	1.5	5.6	2.8	19.2	0.3	100.0
Gambling and betting services	33.7	21.0	6.8	2.6	3.1	0.7	3.8	1.8	5.4	3.1	17.7	0.6	100.0
Education	32.4	24.9	4.4	1.2	1.8	0.4	1.5	0.3	3.0	2.4	27.5	0.2	100.0
Actual and imputed rent on holiday houses	10.5	45.0	5.7	2.4	5.4	2.4	7.9	3.5	3.5	5.3	5.2	3.2	100.0
Other tourism goods and services	21.0	24.3	7.4	2.6	4.0	3.4	6.2	1.9	3.6	4.6	18.3	2.6	100.0
Total	25.7	22.1	11.5	2.8	3.5	1.4	3.6	2.0	4.5	3.5	17.4	2.1	100.0

Regional Economic Contribution of Tourism Destinations in Queensland

Table 11: Total Tourism Consumption by Destination and Expenditure Item 2006–07 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	116	94	39	59	15	3	1	23	131	0	203	53	738
Taxi fares	52	63	20	6	3	1	4	3	7	8	31	1	200
Long distance passenger transportation	478	845	181	76	40	19	77	48	160	96	806	48	2,873
Motor vehicle hire and lease	123	168	47	12	7	3	9	7	25	14	82	3	500
Accommodation services	649	567	372	74	57	26	68	43	154	78	366	23	2,477
Takeaway and restaurant meals	836	655	546	107	89	38	113	66	201	111	412	36	3,209
Shopping (including gifts and souvenirs)	842	761	408	55	152	37	134	79	86	132	491	55	3,231
Local area passenger transportation	33	33	11	4	2	1	3	3	4	5	24	1	123
Repair and maintenance of motor vehicles	8	7	14	5	1	0	5	1	23	1	23	36	124
Fuel (petrol, diesel)	236	322	154	86	106	41	128	38	34	76	118	63	1,402
Food products	443	402	252	59	63	33	71	43	91	80	287	31	1,854
Alcoholic beverages and other beverages	252	209	126	40	46	22	32	33	98	24	240	36	1,159
Motor vehicles, caravans, boats, etc.	48	55	17	13	11	4	11	23	61	22	17	13	295
Recreational, cultural and sports services	303	137	73	28	10	8	19	11	70	15	165	12	851
Gambling and betting services	93	43	22	12	10	4	7	6	23	7	47	5	279
Education	153	340	9	4	8	1	5	1	12	6	17	3	558
Actual and imputed rent on holiday houses	48	205	26	11	25	11	36	16	16	24	24	14	455
Other tourism goods and services	152	170	57	18	32	10	33	8	16	26	96	23	640
Total	4,864	5,075	2,375	669	677	261	756	452	1,214	724	3,446	456	20,969

Regional Economic Contribution of Tourism Destinations in Queensland

Table 12: Shares of Tourism Consumption by Destination and Expenditure Item 2006–07 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	15.7	12.7	5.3	8.0	2.1	0.3	0.2	3.1	17.8	0.0	27.5	7.2	100.0
Taxi fares	26.2	31.4	10.0	2.9	1.5	0.5	2.2	1.7	3.7	3.8	15.5	0.5	100.0
Long distance passenger transportation	16.6	29.4	6.3	2.7	1.4	0.6	2.7	1.7	5.6	3.3	28.0	1.7	100.0
Motor vehicle hire and lease	24.5	33.7	9.4	2.5	1.3	0.7	1.8	1.4	5.0	2.8	16.4	0.6	100.0
Accommodation services	26.2	22.9	15.0	3.0	2.3	1.0	2.7	1.7	6.2	3.1	14.8	0.9	100.0
Takeaway and restaurant meals	26.1	20.4	17.0	3.3	2.8	1.2	3.5	2.0	6.3	3.5	12.8	1.1	100.0
Shopping (including gifts and souvenirs)	26.1	23.5	12.6	1.7	4.7	1.1	4.1	2.5	2.7	4.1	15.2	1.7	100.0
Local area passenger transportation	26.7	26.5	9.0	3.3	1.9	0.4	2.3	2.1	3.6	4.4	19.2	0.6	100.0
Repair and maintenance of motor vehicles	6.6	5.5	11.2	3.9	1.1	0.2	3.7	0.8	18.8	1.1	18.3	28.9	100.0
Fuel (petrol, diesel)	16.8	23.0	11.0	6.1	7.5	2.9	9.1	2.7	2.4	5.4	8.4	4.5	100.0
Food products	23.9	21.7	13.6	3.2	3.4	1.8	3.8	2.3	4.9	4.3	15.5	1.7	100.0
Alcoholic beverages and other beverages	21.7	18.0	10.9	3.5	4.0	1.9	2.8	2.9	8.5	2.1	20.7	3.1	100.0
Motor vehicles, caravans, boats, etc.	16.3	18.7	5.9	4.4	3.6	1.3	3.9	7.7	20.8	7.3	5.6	4.4	100.0
Recreational, cultural and sports services	35.6	16.1	8.6	3.3	1.2	1.0	2.2	1.3	8.2	1.7	19.3	1.4	100.0
Gambling and betting services	33.4	15.4	8.0	4.3	3.5	1.3	2.4	2.0	8.4	2.5	17.0	1.8	100.0
Education	27.4	61.0	1.5	0.8	1.5	0.2	0.9	0.1	2.1	1.1	3.0	0.5	100.0
Actual and imputed rent on holiday houses	10.5	45.0	5.7	2.4	5.4	2.4	7.9	3.5	3.5	5.3	5.2	3.2	100.0
Other tourism goods and services	23.8	26.5	8.9	2.8	5.0	1.5	5.2	1.3	2.4	4.1	15.0	3.5	100.0
Total	23.2	24.2	11.3	3.2	3.2	1.2	3.6	2.2	5.8	3.5	16.4	2.2	100.0

Regional Economic Contribution of Tourism Destinations in Queensland

Table 13: Total Tourism Consumption by Destination and Expenditure Item 2007–08 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	149	68	31	12	14	19	83	38	55	6	248	36	758
Taxi fares	50	62	18	2	3	2	5	3	4	9	29	3	192
Long distance passenger transportation	514	907	168	60	35	30	88	67	129	102	763	36	2,900
Motor vehicle hire and lease	111	153	36	5	5	5	13	9	10	15	69	5	437
Accommodation services	737	639	423	68	50	39	88	29	150	98	358	42	2,720
Takeaway and restaurant meals	939	701	619	97	81	60	130	41	187	133	398	64	3,451
Shopping (including gifts and souvenirs)	793	1,022	365	73	113	49	158	123	46	115	455	37	3,352
Local area passenger transportation	33	39	10	2	2	1	4	1	3	6	25	2	128
Repair and maintenance of motor vehicles	8	11	15	11	1	1	7	0	2	2	30	15	101
Fuel (petrol, diesel)	219	334	197	81	101	52	107	58	27	98	112	68	1,453
Food products	451	439	255	66	57	36	81	48	69	81	281	40	1,904
Alcoholic beverages and other beverages	276	192	126	21	53	23	54	29	37	31	263	56	1,159
Motor vehicles, caravans, boats, etc.	40	106	27	14	5	6	12	2	14	17	48	2	294
Recreational, cultural and sports services	317	161	93	19	8	12	26	11	52	21	209	17	946
Gambling and betting services	88	48	21	8	7	4	9	6	16	14	50	5	276
Education	129	418	22	7	-	3	7	-	9	5	30	4	634
Actual and imputed rent on holiday houses	53	227	29	12	27	12	40	18	18	27	26	16	504
Other tourism goods and services	118	254	53	9	41	9	44	13	16	14	98	7	677
Total	5,026	5,781	2,508	570	602	364	957	496	842	793	3,493	455	21,887

Regional Economic Contribution of Tourism Destinations in Queensland

Table 14: Shares of Tourism Consumption by Destination and Expenditure Item 2007–08 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	19.6	8.9	4.1	1.5	1.8	2.6	10.9	5.0	7.3	0.9	32.7	4.7	100.0
Taxi fares	26.0	32.5	9.3	1.3	1.5	1.3	2.8	1.5	2.1	4.9	15.3	1.5	100.0
Long distance passenger transportation	17.7	31.3	5.8	2.1	1.2	1.1	3.0	2.3	4.4	3.5	26.3	1.3	100.0
Motor vehicle hire and lease	25.4	34.9	8.3	1.2	1.1	1.2	2.9	2.1	2.4	3.5	15.8	1.1	100.0
Accommodation services	27.1	23.5	15.5	2.5	1.8	1.4	3.2	1.1	5.5	3.6	13.2	1.5	100.0
Takeaway and restaurant meals	27.2	20.3	17.9	2.8	2.3	1.8	3.8	1.2	5.4	3.9	11.5	1.9	100.0
Shopping (including gifts and souvenirs)	23.7	30.5	10.9	2.2	3.4	1.5	4.7	3.7	1.4	3.4	13.6	1.1	100.0
Local area passenger transportation	25.7	30.3	7.8	1.4	1.9	1.0	3.0	1.1	2.2	4.7	19.1	1.7	100.0
Repair and maintenance of motor vehicles	7.5	11.2	14.4	11.0	0.6	0.9	7.1	0.2	1.6	1.8	29.3	14.6	100.0
Fuel (petrol, diesel)	15.1	23.0	13.6	5.6	6.9	3.6	7.4	4.0	1.8	6.8	7.7	4.7	100.0
Food products	23.7	23.1	13.4	3.5	3.0	1.9	4.3	2.5	3.6	4.2	14.8	2.1	100.0
Alcoholic beverages and other beverages	23.8	16.5	10.9	1.8	4.6	1.9	4.6	2.5	3.2	2.6	22.7	4.8	100.0
Motor vehicles, caravans, boats, etc.	13.6	36.1	9.2	4.9	1.7	2.2	4.2	0.7	4.8	5.6	16.3	0.7	100.0
Recreational, cultural and sports services	33.5	17.0	9.8	2.1	0.8	1.3	2.7	1.2	5.4	2.2	22.1	1.8	100.0
Gambling and betting services	31.7	17.4	7.8	3.0	2.4	1.3	3.3	2.0	5.9	5.1	18.1	2.0	100.0
Education	20.4	66.0	3.5	1.1	0.0	0.4	1.1	0.0	1.4	0.8	4.7	0.6	100.0
Actual and imputed rent on holiday houses	10.5	45.0	5.7	2.4	5.4	2.4	7.9	3.5	3.5	5.3	5.2	3.2	100.0
Other tourism goods and services	17.5	37.5	7.8	1.4	6.1	1.4	6.5	2.0	2.3	2.0	14.6	1.0	100.0
Total	23.0	26.4	11.5	2.6	2.8	1.7	4.4	2.3	3.8	3.6	16.0	2.1	100.0

Tourism Output at Basic Prices

Tourism output is measured at 'basic prices', or also known as producers' prices where net taxes⁴ and margins⁵ are not included in the prices. Output consists of all goods and services that are produced within an establishment for consumption inside the region and also consumption outside in the form of exports.

Figure 3: Regional Output Shares in Queensland Total Tourism Output

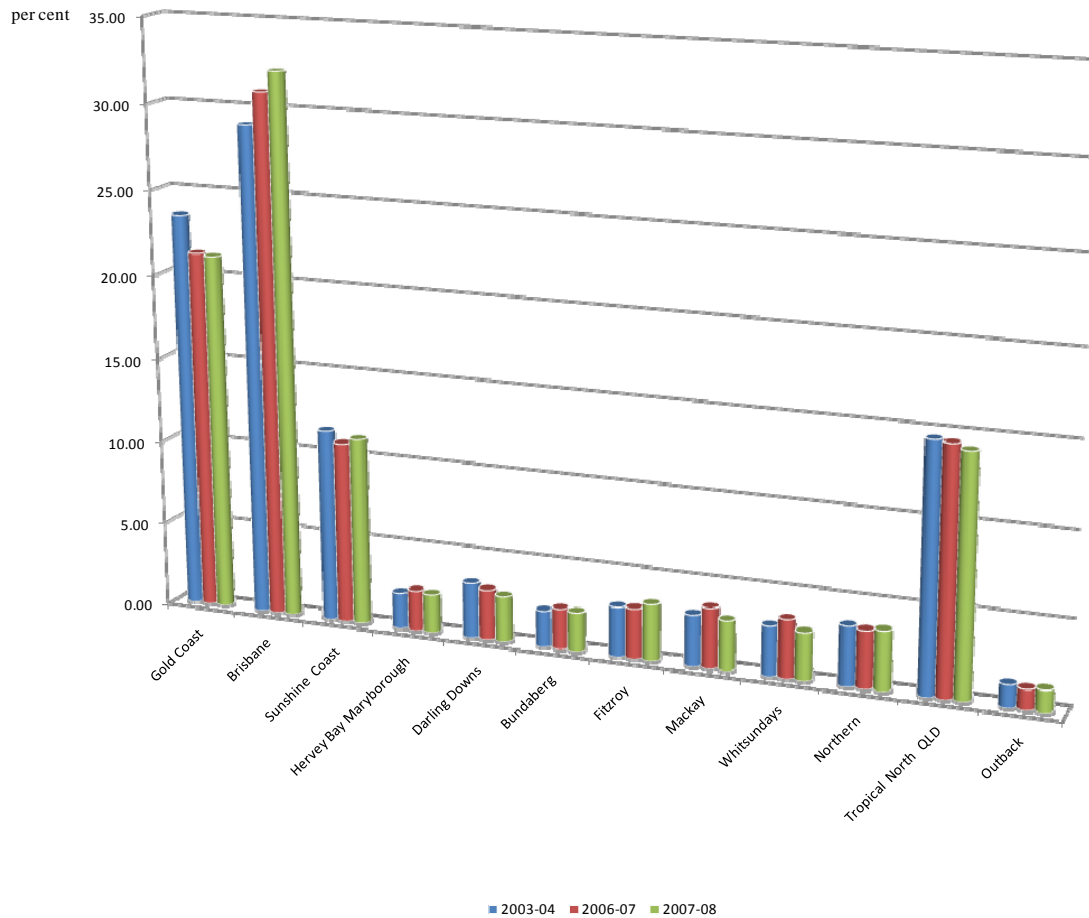


Figure 3 demonstrates clearly how important Brisbane is among all tourism destinations of Queensland. Although both Brisbane and The Gold Coast were the top two destinations that attracted the most tourism consumption, Brisbane produced far more goods and services for the tourism sector than the Gold Coast and all other regions. It should be noted that as output is valued at current prices, it is not ideal for calculating output growth of the tourism sector over time. Interestingly, for the major regional tourism destinations as indicated in Table 16, while Brisbane's share of tourism output for Queensland has increased from 2003–04 to 2007–08, the share of the Gold Coast has decreased, as have the shares for Tropical North Queensland and Sunshine Coast.

⁴ Neither taxes nor subsidies are incorporated into the prices.

⁵ Margins are commodities required to facilitate goods and services from producers to consumers, or tourism related products to visitors in this case.

Regional Economic Contribution of Tourism Destinations in Queensland

Table 15: Aggregate Regional Tourism Industry Output

(\$ million)	2003-04	2006-07	2007-08
Gold Coast	3,567	3,380	3,504
Brisbane	4,402	4,909	5,319
Sunshine Coast	1,742	1,712	1,843
Hervey Bay/Maryborough	328	382	380
Darling Downs	500	476	453
Bundaberg	330	384	382
Fitzroy	451	474	557
Mackay	464	569	489
Whitsundays	451	552	470
Northern	537	540	583
Tropical North QLD	2,217	2,298	2,341
Outback	206	194	217
Total	15,193	15,870	16,538
(per cent)	2003-04	2006-07	2007-08
Gold Coast	23.48	21.30	21.19
Brisbane	28.97	30.93	32.17
Sunshine Coast	11.46	10.79	11.14
Hervey Bay/Maryborough	2.16	2.41	2.30
Darling Downs	3.29	3.00	2.74
Bundaberg	2.17	2.42	2.31
Fitzroy	2.97	2.99	3.37
Mackay	3.05	3.59	2.96
Whitsundays	2.97	3.48	2.84
Northern	3.54	3.40	3.52
Tropical North QLD	14.59	14.48	14.16
Outback	1.35	1.22	1.31
Total	100	100	100

Regional Economic Contribution of Tourism Destinations in Queensland

Table 16: Regional Industry Output by Destination 2003–04 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	59	188	31	6	7	6	11	24	24	14	125	2	495
Taxi transport	42	66	18	2	3	2	3	3	3	7	30	1	180
Air and water transport	191	911	88	19	19	19	33	63	63	67	304	12	1,787
Motor vehicle hiring	54	52	22	2	1	2	3	4	4	6	44	0	196
Accommodation	584	289	372	37	51	37	53	70	70	66	313	42	1,984
Cafés, restaurants and food outlets	668	331	426	42	58	42	60	81	81	76	358	49	2,271
Clubs, pubs, taverns and bars	169	84	108	11	15	11	15	20	20	19	90	12	574
Other road transport	151	206	72	19	26	19	16	18	18	26	102	8	682
Rail transport	7	45	2	2	2	2	5	2	2	4	13	1	89
Food manufacturing	119	272	43	40	86	40	44	26	26	34	73	13	815
Beverage manufacturing	39	103	8	28	17	28	4	24	24	25	54	2	358
Transport equipment manufacturing	21	38	4	3	3	3	2	1	1	2	12	0	91
Other manufacturing	136	407	59	16	27	16	22	9	9	17	27	4	749
Automotive fuel retailing	-	-	-	-	-	-	-	-	-	-	-	-	-
Other retail trade	471	380	252	42	77	42	76	46	46	61	219	24	1,737
Casinos and other gambling services	41	17	1	0	0	0	1	1	1	3	19	0	85
Libraries, museums and arts	78	58	27	2	3	2	3	4	4	5	69	1	256
Other entertainment services	207	114	34	5	6	5	9	12	12	11	57	1	474
Education	131	86	15	2	14	2	5	4	4	6	48	0	316
Ownership of dwellings	50	164	25	4	18	6	17	13	0	19	25	7	349
All other industries	350	594	135	46	67	46	69	37	37	66	235	25	1,707
Total	3,567	4,402	1,742	328	500	330	451	464	451	537	2,217	206	15,193

Regional Economic Contribution of Tourism Destinations in Queensland

Table 17: Regional Shares of Tourism Industry Output 2003–04 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	12.0	37.9	6.3	1.1	1.4	1.1	2.1	4.8	4.8	2.9	25.3	0.4	100
Taxi transport	23.1	36.6	10.0	1.2	1.6	1.2	1.4	1.9	1.9	4.0	16.4	0.6	100
Air and water transport	10.7	51.0	4.9	1.0	1.1	1.0	1.9	3.5	3.5	3.8	17.0	0.7	100
Motor vehicle hiring	27.6	26.7	11.4	1.0	0.6	1.0	1.7	2.0	2.0	3.2	22.6	0.2	100
Accommodation	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100
Cafés, restaurants and food outlets	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100
Clubs, pubs, taverns and bars	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100
Other road transport	22.1	30.2	10.6	2.8	3.8	2.8	2.3	2.7	2.7	3.8	14.9	1.2	100
Rail transport	7.5	51.2	2.7	1.9	2.4	1.9	5.8	2.8	2.8	4.9	15.0	1.3	100
Food manufacturing	14.6	33.3	5.3	4.9	10.5	4.9	5.3	3.2	3.2	4.2	9.0	1.6	100
Beverage manufacturing	11.0	28.7	2.4	7.8	4.8	7.8	1.2	6.8	6.8	7.0	15.1	0.5	100
Transport equipment manufacturing	23.7	41.6	4.1	3.5	3.1	3.5	2.0	1.3	1.3	2.3	13.3	0.3	100
Other manufacturing	18.1	54.3	7.9	2.2	3.6	2.2	2.9	1.2	1.2	2.3	3.6	0.6	100
Automotive fuel retailing	-	-	-	-	-	-	-	-	-	-	-	-	-
Other retail trade	27.1	21.9	14.5	2.4	4.4	2.4	4.4	2.6	2.6	3.5	12.6	1.4	100
Casinos and other gambling services	48.6	19.6	0.9	0.5	0.4	0.5	0.7	0.8	0.8	4.1	22.8	0.1	100
Libraries, museums and arts	30.6	22.6	10.6	0.8	1.0	0.8	1.3	1.6	1.6	2.0	26.9	0.3	100
Other entertainment services	43.7	24.1	7.1	1.0	1.3	1.0	1.9	2.6	2.6	2.4	12.1	0.2	100
Education	41.3	27.1	4.7	0.6	4.3	0.6	1.6	1.3	1.3	1.9	15.0	0.1	100
Ownership of dwellings	14.2	46.9	7.1	1.3	5.3	1.6	4.9	3.9	0.0	5.5	7.3	2.0	100
All other industries	20.5	34.8	7.9	2.7	3.9	2.7	4.1	2.2	2.2	3.9	13.8	1.4	100
Total	23.5	29.0	11.5	2.2	3.3	2.2	3.0	3.1	3.0	3.5	14.6	1.4	100

Regional Economic Contribution of Tourism Destinations in Queensland

Table 18: Regional Industry Output by Destination 2006–07 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	74	169	24	13	8	13	4	30	30	2	315	19	701
Taxi transport	47	80	18	4	4	4	3	5	5	6	20	1	197
Air and water transport	194	993	102	21	20	21	39	71	71	76	291	16	1,915
Motor vehicle hiring	103	173	42	9	3	9	6	13	13	9	56	1	438
Accommodation	636	501	408	57	61	57	81	102	102	83	327	25	2,441
Cafés, restaurants and food outlets	628	494	402	56	61	56	80	101	101	82	322	24	2,408
Clubs, pubs, taverns and bars	159	125	102	14	15	14	20	26	26	21	82	6	610
Other road transport	72	114	39	14	15	14	10	14	14	14	50	6	377
Rail transport	17	134	7	10	8	10	19	12	12	10	28	8	276
Food manufacturing	117	289	44	43	87	43	49	30	30	37	84	13	866
Beverage manufacturing	41	107	12	38	21	38	5	30	30	29	81	3	434
Transport equipment manufacturing	16	34	4	4	4	4	2	4	4	3	4	1	84
Other manufacturing	87	251	41	8	14	8	14	7	7	11	21	3	474
Automotive fuel retailing	29	24	17	3	4	3	4	4	4	4	18	2	115
Other retail trade	397	329	224	37	57	37	56	47	47	59	232	27	1,549
Casinos and other gambling services	35	12	1	1	0	1	1	1	1	3	24	0	80
Libraries, museums and arts	69	44	26	3	2	3	2	5	5	4	82	2	245
Other entertainment services	209	100	38	8	4	8	8	16	16	10	79	2	498
Education	126	303	12	4	9	4	8	9	9	7	17	3	510
Ownership of dwellings	64	212	32	6	24	7	22	17	0	25	33	9	453
All other industries	259	420	118	29	54	29	41	26	26	43	132	22	1,200
Total	3,380	4,909	1,712	382	476	384	474	569	552	540	2,298	194	15,870

Regional Economic Contribution of Tourism Destinations in Queensland

Table 19: Regional Shares of Tourism Industry Output 2006–07 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	10.5	24.0	3.4	1.8	1.2	1.8	0.6	4.3	4.3	0.3	44.9	2.8	100
Taxi transport	23.8	40.6	9.1	2.1	2.0	2.1	1.6	2.3	2.3	3.3	10.4	0.4	100
Air and water transport	10.1	51.8	5.3	1.1	1.1	1.1	2.0	3.7	3.7	4.0	15.2	0.8	100
Motor vehicle hiring	23.6	39.6	9.6	2.2	0.7	2.2	1.3	2.9	2.9	2.1	12.7	0.2	100
Accommodation	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100
Cafés, restaurants and food outlets	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100
Clubs, pubs, taverns and bars	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100
Other road transport	19.2	30.3	10.5	3.6	4.0	3.6	2.7	3.7	3.7	3.8	13.4	1.5	100
Rail transport	6.0	48.7	2.7	3.5	3.0	3.5	6.8	4.4	4.4	3.8	10.3	3.0	100
Food manufacturing	13.5	33.4	5.1	5.0	10.0	5.0	5.6	3.4	3.4	4.3	9.7	1.5	100
Beverage manufacturing	9.5	24.6	2.7	8.7	4.8	8.7	1.2	6.9	6.9	6.7	18.6	0.8	100
Transport equipment manufacturing	19.6	40.0	4.8	4.3	4.4	4.3	2.9	5.2	5.2	4.0	4.4	0.9	100
Other manufacturing	18.4	53.0	8.6	1.8	3.0	1.8	3.0	1.4	1.4	2.4	4.5	0.7	100
Automotive fuel retailing	25.4	20.9	14.4	2.5	3.6	2.5	3.6	3.1	3.1	3.8	15.2	1.9	100
Other retail trade	25.6	21.2	14.5	2.4	3.7	2.4	3.6	3.1	3.1	3.8	15.0	1.7	100
Casinos and other gambling services	44.6	15.6	0.9	0.6	0.5	0.6	0.6	1.1	1.1	4.3	29.8	0.2	100
Libraries, museums and arts	28.0	18.2	10.5	1.1	0.6	1.1	1.0	1.9	1.9	1.5	33.3	0.8	100
Other entertainment services	42.0	20.1	7.6	1.5	0.8	1.5	1.6	3.2	3.2	2.1	15.9	0.5	100
Education	24.6	59.4	2.3	0.9	1.7	0.9	1.5	1.7	1.7	1.3	3.3	0.7	100
Ownership of dwellings	14.2	46.9	7.1	1.3	5.3	1.6	4.9	3.9	0.0	5.5	7.3	2.0	100
All other industries	21.6	35.0	9.8	2.4	4.5	2.4	3.4	2.2	2.2	3.6	11.0	1.8	100
Total	21.3	30.9	10.8	2.4	3.0	2.4	3.0	3.6	3.5	3.4	14.5	1.2	100

Regional Economic Contribution of Tourism Destinations in Queensland

Table 20: Regional Industry Output by Destination 2007–08 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	84	165	19	7	8	7	24	18	18	5	358	10	723
Taxi transport	46	81	17	3	4	3	4	3	3	8	20	2	194
Air and water transport	194	1,031	97	21	20	21	41	69	69	81	297	14	1,954
Motor vehicle hiring	89	163	35	6	3	6	7	8	8	10	48	1	383
Accommodation	727	554	471	63	58	63	97	91	91	101	319	44	2,678
Cafés, restaurants and food outlets	703	536	456	61	56	61	94	88	88	97	309	42	2,591
Clubs, pubs, taverns and bars	175	134	114	15	14	15	23	22	22	24	77	11	646
Other road transport	70	115	40	12	14	12	10	11	11	16	48	6	365
Rail transport	18	145	8	7	8	7	18	8	8	14	30	8	280
Food manufacturing	115	292	43	44	84	44	50	26	26	36	79	15	855
Beverage manufacturing	42	104	12	35	23	35	7	24	24	30	81	4	418
Transport equipment manufacturing	11	35	4	3	2	3	2	1	1	2	5	0	69
Other manufacturing	74	243	36	9	12	9	13	6	6	10	18	3	439
Automotive fuel retailing	30	29	17	3	4	3	5	3	3	5	17	2	122
Other retail trade	395	388	225	45	49	45	66	44	44	60	225	26	1,611
Casinos and other gambling services	33	12	1	0	0	0	1	1	1	4	26	0	79
Libraries, museums and arts	71	49	31	3	1	3	3	4	4	5	97	3	272
Other entertainment services	224	115	46	7	4	7	10	13	13	13	98	3	553
Education	109	389	25	4	2	4	5	4	4	5	26	2	579
Ownership of dwellings	71	235	35	6	27	8	25	19	0	28	37	10	501
All other industries	223	504	112	26	62	26	53	27	27	30	126	10	1,227
Total	3,504	5,319	1,843	380	453	382	557	489	470	583	2,341	217	16,538

Regional Economic Contribution of Tourism Destinations in Queensland

Table 21: Regional Shares of Tourism Industry Output 2007–08 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	11.56	22.79	2.67	0.92	1.07	0.92	3.34	2.53	2.53	0.69	49.53	1.44	100
Taxi transport	23.76	41.63	8.72	1.67	1.98	1.67	1.83	1.65	1.65	4.11	10.50	0.82	100
Air and water transport	9.94	52.78	4.96	1.07	1.00	1.07	2.12	3.52	3.52	4.13	15.18	0.70	100
Motor vehicle hiring	23.22	42.60	9.11	1.45	0.72	1.45	1.93	1.98	1.98	2.71	12.52	0.31	100
Accommodation	27.14	20.70	17.59	2.37	2.15	2.37	3.61	3.38	3.38	3.76	11.91	1.64	100
Cafés, restaurants and food outlets	27.14	20.70	17.59	2.37	2.15	2.37	3.61	3.38	3.38	3.76	11.91	1.64	100
Clubs, pubs, taverns and bars	27.14	20.70	17.59	2.37	2.15	2.37	3.61	3.38	3.38	3.76	11.91	1.64	100
Other road transport	19.18	31.43	11.02	3.41	3.81	3.41	2.77	2.99	2.99	4.25	13.09	1.63	100
Rail transport	6.41	51.98	2.70	2.56	2.91	2.56	6.35	2.96	2.96	4.85	10.75	3.01	100
Food manufacturing	13.44	34.17	5.02	5.18	9.79	5.18	5.79	3.08	3.08	4.25	9.28	1.74	100
Beverage manufacturing	10.05	24.80	2.85	8.31	5.40	8.31	1.56	5.68	5.68	7.12	19.34	0.91	100
Transport equipment manufacturing	16.30	50.54	5.35	4.14	3.06	4.14	2.37	1.46	1.46	2.97	7.89	0.31	100
Other manufacturing	16.87	55.47	8.17	1.99	2.68	1.99	2.96	1.41	1.41	2.33	4.11	0.62	100
Automotive fuel retailing	24.34	23.87	13.87	2.87	2.97	2.87	4.12	2.73	2.73	3.72	14.24	1.66	100
Other retail trade	24.52	24.12	13.94	2.77	3.05	2.77	4.12	2.71	2.71	3.71	13.97	1.63	100
Casinos and other gambling services	42.16	15.67	0.84	0.50	0.35	0.50	0.69	0.78	0.78	5.14	32.35	0.23	100
Libraries, museums and arts	25.91	17.99	11.44	0.93	0.52	0.93	1.05	1.34	1.34	1.73	35.76	1.07	100
Other entertainment services	40.56	20.76	8.30	1.24	0.71	1.24	1.80	2.42	2.42	2.35	17.69	0.51	100
Education	18.78	67.09	4.36	0.72	0.36	0.72	0.93	0.66	0.66	0.78	4.56	0.37	100
Ownership of dwellings	14.21	46.86	7.08	1.26	5.30	1.64	4.94	3.85	0.04	5.53	7.28	2.03	100
All other industries	18.20	41.10	9.16	2.08	5.09	2.08	4.34	2.18	2.18	2.46	10.27	0.84	100
Total	21.2	32.2	11.1	2.3	2.7	2.3	3.4	3.0	2.8	3.5	14.2	1.3	100

Tourism Gross Value Added

Tourism gross value added measures the value of tourism gross output at basic prices by all industries which supply tourism products, less the value of the inputs⁶ used in producing these tourism products. Tourism gross value added is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and should also be used for comparisons across countries or regions.

As Table 22 shows in 2007–08, tourism gross value added was \$7,463 million. Of this value added 32.74 per cent was associated with tourism in Brisbane, followed by the Gold Coast (21.16%), Tropical North Queensland (14.60%), and the Sunshine Coast (11.06%). As shown in Table 27, overall, the industries that contributed the greatest value added in 2007–08 were in order: Accommodation, Other Retail Trade, Cafes, Restaurants and Food outlets and Air and Water Transport.

Table 22: Regional Tourism Value Added

(\$ million)	2003-04	2006-07	2007-08
Gold Coast	1,584	1,533	1,579
Brisbane	1,893	2,222	2,443
Sunshine Coast	769	766	825
Hervey Bay/Maryborough	136	161	159
Darling Downs	213	205	195
Bundaberg	137	162	161
Fitzroy	199	208	250
Mackay	202	250	213
Whitsundays	191	235	197
Northern	234	235	253
Tropical North QLD	988	1,060	1,090
Outback	90	92	98
Total	6,634	7,128	7,463
(per cent)	2003-04	2006-07	2007-08
Gold Coast	23.88	21.51	21.16
Brisbane	28.54	31.17	32.74
Sunshine Coast	11.59	10.74	11.06
Hervey Bay/Maryborough	2.04	2.26	2.13
Darling Downs	3.21	2.87	2.61
Bundaberg	2.06	2.28	2.15
Fitzroy	3.00	2.91	3.35
Mackay	3.04	3.50	2.86
Whitsundays	2.87	3.30	2.65
Northern	3.53	3.30	3.38
Tropical North QLD	14.89	14.87	14.60
Outback	1.35	1.29	1.31
Total	100	100	100

⁶ Input values are measured at purchasers' prices, which include net commodity taxes and margins that tourism services providers pay to material or inputs suppliers.

Regional Economic Contribution of Tourism Destinations in Queensland

Table 23: Regional Gross Industry Value Added by Destination 2003–04 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	38	121	20	4	4	4	7	15	15	9	81	1	320
Taxi transport	17	26	7	1	1	1	1	1	1	3	12	0	72
Air and water transport	67	322	31	7	7	7	12	22	22	24	107	4	631
Motor vehicle hiring	33	32	14	1	1	1	2	2	2	4	27	0	120
Accommodation	293	145	187	18	26	18	26	35	35	33	157	21	997
Cafés, restaurants and food outlets	235	116	150	15	20	15	21	28	28	27	126	17	797
Clubs, pubs, taverns and bars	72	36	46	5	6	5	6	9	9	8	39	5	245
Other road transport	57	78	27	7	10	7	6	7	7	10	38	3	257
Rail transport	2	15	1	1	1	1	2	1	1	1	4	0	30
Food manufacturing	27	61	10	9	19	9	10	6	6	8	17	3	185
Beverage manufacturing	14	37	3	10	6	10	2	9	9	9	20	1	130
Transport equipment manufacturing	6	11	1	1	1	1	1	0	0	1	3	0	25
Other manufacturing	45	135	20	5	9	5	7	3	3	6	9	1	248
Automotive fuel retailing	-	-	-	-	-	-	-	-	-	-	-	-	-
Other retail trade	245	198	132	22	40	22	40	24	24	32	114	13	905
Casinos and other gambling services	23	9	0	0	0	0	0	0	0	2	11	0	47
Libraries, museums and arts	42	31	14	1	1	1	2	2	2	3	37	0	137
Other entertainment services	57	32	9	1	2	1	2	3	3	3	16	0	131
Education	99	65	11	2	10	2	4	3	3	5	36	0	239
Ownership of dwellings	41	134	20	4	15	5	14	11	0	16	21	6	287
All other industries	170	289	66	23	33	23	34	18	18	32	114	12	831
Total	1,584	1,893	769	136	213	137	199	202	191	234	988	90	6,634

Regional Economic Contribution of Tourism Destinations in Queensland

Table 24: Regional Shares of Tourism Industry Gross Value Added by Destination 2003–04 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	12.0	37.9	6.3	1.1	1.4	1.1	2.1	4.8	4.8	2.9	25.3	0.4	100.0
Taxi transport	23.1	36.6	10.0	1.2	1.6	1.2	1.4	1.9	1.9	4.0	16.4	0.6	100.0
Air and water transport	10.7	51.0	4.9	1.0	1.1	1.0	1.9	3.5	3.5	3.8	16.9	0.7	100.0
Motor vehicle hiring	27.6	26.7	11.4	1.0	0.6	1.0	1.7	2.0	2.0	3.2	22.6	0.2	100.0
Accommodation	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100.0
Cafés, restaurants and food outlets	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100.0
Clubs, pubs, taverns and bars	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100.0
Other road transport	22.1	30.2	10.6	2.8	3.8	2.8	2.3	2.7	2.7	3.8	14.9	1.2	100.0
Rail transport	7.5	51.2	2.7	1.9	2.4	1.9	5.8	2.8	2.8	4.9	15.0	1.3	100.0
Food manufacturing	14.6	33.3	5.3	4.9	10.5	4.9	5.3	3.2	3.2	4.2	9.0	1.6	100.0
Beverage manufacturing	11.0	28.7	2.4	7.8	4.8	7.8	1.2	6.8	6.8	7.0	15.1	0.5	100.0
Transport equipment manufacturing	23.7	41.6	4.1	3.5	3.1	3.5	2.0	1.3	1.3	2.3	13.3	0.3	100.0
Other manufacturing	18.2	54.2	7.9	2.1	3.6	2.1	3.0	1.2	1.2	2.2	3.6	0.6	100.0
Automotive fuel retailing	-	-	-	-	-	-	-	-	-	-	-	-	-
Other retail trade	27.1	21.9	14.5	2.4	4.4	2.4	4.4	2.6	2.6	3.5	12.6	1.4	100.0
Casinos and other gambling services	48.6	19.6	0.9	0.5	0.4	0.5	0.7	0.8	0.8	4.1	22.8	0.1	100.0
Libraries, museums and arts	30.6	22.6	10.6	0.8	1.0	0.8	1.3	1.6	1.6	2.0	26.9	0.3	100.0
Other entertainment services	43.7	24.1	7.1	1.0	1.3	1.0	1.9	2.6	2.6	2.4	12.1	0.2	100.0
Education	41.3	27.1	4.7	0.6	4.3	0.6	1.6	1.3	1.3	1.9	15.0	0.1	100.0
Ownership of dwellings	14.2	46.9	7.1	1.3	5.3	1.6	4.9	3.9	0.0	5.5	7.3	2.0	100.0
All other industries	20.5	34.8	7.9	2.7	3.9	2.7	4.1	2.2	2.2	3.9	13.8	1.4	100.0
Total	23.88	28.54	11.59	2.04	3.21	2.06	3.00	3.04	2.87	3.53	14.89	1.35	100.00

Regional Economic Contribution of Tourism Destinations in Queensland

Table 25: Regional Gross Industry Value Added by Destination 2006–07 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	48	109	15	8	5	8	3	20	20	1	203	13	453
Taxi transport	19	32	7	2	2	2	1	2	2	3	8	0	79
Air and water transport	66	336	35	7	7	7	13	24	24	26	99	5	649
Motor vehicle hiring	63	106	26	6	2	6	4	8	8	6	34	1	268
Accommodation	320	252	205	29	31	29	41	51	51	42	164	12	1,228
Cafés, restaurants and food outlets	212	167	136	19	20	19	27	34	34	28	109	8	812
Clubs, pubs, taverns and bars	68	53	44	6	7	6	9	11	11	9	35	3	260
Other road transport	30	47	16	6	6	6	4	6	6	6	21	2	155
Rail transport	6	47	3	3	3	3	7	4	4	4	10	3	97
Food manufacturing	25	62	9	9	19	9	11	6	6	8	18	3	187
Beverage manufacturing	14	37	4	13	7	13	2	10	10	10	28	1	149
Transport equipment manufacturing	5	9	1	1	1	1	1	1	1	1	1	0	23
Other manufacturing	29	82	13	3	5	3	5	2	2	4	7	1	155
Automotive fuel retailing	9	8	5	1	1	1	1	1	1	1	6	1	37
Other retail trade	217	180	122	20	31	20	31	26	26	32	127	15	846
Casinos and other gambling services	20	7	0	0	0	0	0	0	0	2	13	0	44
Libraries, museums and arts	37	24	14	2	1	2	1	2	2	2	44	1	132
Other entertainment services	58	28	10	2	1	2	2	4	4	3	22	1	138
Education	96	232	9	3	7	3	6	7	7	5	13	3	390
Ownership of dwellings	54	177	27	5	20	6	19	15	0	21	28	8	379
All other industries	140	227	64	16	29	16	22	14	14	23	71	12	648
Total	1,533	2,222	766	161	205	162	208	250	235	235	1,060	92	7,128

Regional Economic Contribution of Tourism Destinations in Queensland

Table 26: Regional Shares of Tourism Industry Gross Value Added by Destination 2006–07 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	10.5	24.0	3.4	1.8	1.2	1.8	0.6	4.3	4.3	0.3	44.9	2.8	100.0
Taxi transport	23.8	40.6	9.1	2.1	2.0	2.1	1.6	2.3	2.3	3.3	10.4	0.4	100.0
Air and water transport	10.1	51.8	5.3	1.1	1.1	1.1	2.0	3.7	3.7	4.0	15.2	0.8	100.0
Motor vehicle hiring	23.6	39.6	9.6	2.2	0.7	2.2	1.3	2.9	2.9	2.1	12.7	0.2	100.0
Accommodation	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100.0
Cafés, restaurants and food outlets	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100.0
Clubs, pubs, taverns and bars	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100.0
Other road transport	19.2	30.3	10.5	3.6	4.0	3.6	2.7	3.7	3.7	3.8	13.4	1.5	100.0
Rail transport	6.0	48.7	2.7	3.5	3.0	3.5	6.8	4.4	4.4	3.8	10.3	3.0	100.0
Food manufacturing	13.5	33.3	5.1	5.0	10.0	5.0	5.6	3.4	3.4	4.3	9.7	1.5	100.0
Beverage manufacturing	9.5	24.6	2.7	8.7	4.8	8.7	1.2	6.9	6.9	6.7	18.6	0.8	100.0
Transport equipment manufacturing	19.6	40.0	4.8	4.3	4.4	4.3	2.9	5.2	5.2	4.0	4.4	0.9	100.0
Other manufacturing	18.4	53.0	8.6	1.8	3.0	1.8	3.0	1.4	1.4	2.4	4.5	0.7	100.0
Automotive fuel retailing	25.4	20.9	14.4	2.5	3.6	2.5	3.6	3.1	3.1	3.8	15.2	1.9	100.0
Other retail trade	25.6	21.2	14.5	2.4	3.7	2.4	3.6	3.1	3.1	3.8	15.0	1.7	100.0
Casinos and other gambling services	44.6	15.6	0.9	0.6	0.5	0.6	0.6	1.1	1.1	4.3	29.8	0.2	100.0
Libraries, museums and arts	28.0	18.2	10.5	1.1	0.6	1.1	1.0	1.9	1.9	1.5	33.3	0.8	100.0
Other entertainment services	42.0	20.1	7.6	1.5	0.8	1.5	1.6	3.2	3.2	2.1	15.9	0.5	100.0
Education	24.6	59.4	2.3	0.9	1.7	0.9	1.5	1.7	1.7	1.3	3.3	0.7	100.0
Ownership of dwellings	14.2	46.9	7.1	1.3	5.3	1.6	4.9	3.9	0.0	5.5	7.3	2.0	100.0
All other industries	21.6	35.0	9.8	2.4	4.5	2.4	3.4	2.2	2.2	3.6	11.0	1.8	100.0
Total	21.51	31.17	10.74	2.26	2.87	2.28	2.91	3.50	3.30	3.30	14.87	1.29	100.00

Regional Economic Contribution of Tourism Destinations in Queensland

Table 27: Regional Gross Industry Value Added by Destination 2007–08 (\$m)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	54	106	12	4	5	4	16	12	12	3	231	7	467
Taxi transport	18	32	7	1	2	1	1	1	1	3	8	1	77
Air and water transport	66	349	33	7	7	7	14	23	23	27	101	5	662
Motor vehicle hiring	54	100	21	3	2	3	5	5	5	6	29	1	234
Accommodation	366	279	237	32	29	32	49	46	46	51	160	22	1,347
Cafés, restaurants and food outlets	237	181	154	21	19	21	32	30	30	33	104	14	874
Clubs, pubs, taverns and bars	75	57	49	7	6	7	10	9	9	10	33	5	276
Other road transport	29	47	17	5	6	5	4	5	5	6	20	2	150
Rail transport	6	51	3	3	3	3	6	3	3	5	11	3	98
Food manufacturing	25	63	9	10	18	10	11	6	6	8	17	3	185
Beverage manufacturing	14	35	4	12	8	12	2	8	8	10	28	1	143
Transport equipment manufacturing	3	10	1	1	1	1	0	0	0	1	1	0	19
Other manufacturing	24	79	12	3	4	3	4	2	2	3	6	1	143
Automotive fuel retailing	10	9	5	1	1	1	2	1	1	1	6	1	39
Other retail trade	216	212	123	24	27	24	36	24	24	33	123	14	880
Casinos and other gambling services	18	7	0	0	0	0	0	0	0	2	14	0	44
Libraries, museums and arts	38	26	17	1	1	1	2	2	2	3	52	2	146
Other entertainment services	62	32	13	2	1	2	3	4	4	4	27	1	153
Education	83	298	19	3	2	3	4	3	3	3	20	2	444
Ownership of dwellings	60	196	30	5	22	7	21	16	0	23	30	8	419
All other industries	120	272	61	14	34	14	29	14	14	16	68	6	662
Total	1,579	2,443	825	159	195	161	250	213	197	253	1,090	98	7,463

Regional Economic Contribution of Tourism Destinations in Queensland

Table 28: Regional Shares of Tourism Industry Gross Value Added by Destination 2007–08 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	11.56	22.79	2.67	0.92	1.07	0.92	3.34	2.53	2.53	0.69	49.53	1.44	100.00
Taxi transport	23.8	41.6	8.7	1.7	2.0	1.7	1.8	1.6	1.6	4.1	10.5	0.8	100.0
Air and water transport	9.9	52.8	5.0	1.1	1.0	1.1	2.1	3.5	3.5	4.1	15.2	0.7	100.0
Motor vehicle hiring	23.2	42.6	9.1	1.5	0.7	1.5	1.9	2.0	2.0	2.7	12.5	0.3	100.0
Accommodation	27.1	20.7	17.6	2.4	2.1	2.4	3.6	3.4	3.4	3.8	11.9	1.6	100.0
Cafés, restaurants and food outlets	27.1	20.7	17.6	2.4	2.1	2.4	3.6	3.4	3.4	3.8	11.9	1.6	100.0
Clubs, pubs, taverns and bars	27.1	20.7	17.6	2.4	2.1	2.4	3.6	3.4	3.4	3.8	11.9	1.6	100.0
Other road transport	19.2	31.4	11.0	3.4	3.8	3.4	2.8	3.0	3.0	4.2	13.1	1.6	100.0
Rail transport	6.4	52.0	2.7	2.6	2.9	2.6	6.3	3.0	3.0	4.9	10.7	3.0	100.0
Food manufacturing	13.4	34.2	5.0	5.2	9.8	5.2	5.8	3.1	3.1	4.2	9.3	1.7	100.0
Beverage manufacturing	10.0	24.8	2.8	8.3	5.4	8.3	1.6	5.7	5.7	7.1	19.3	0.9	100.0
Transport equipment manufacturing	16.3	50.5	5.4	4.1	3.1	4.1	2.4	1.5	1.5	3.0	7.9	0.3	100.0
Other manufacturing	16.9	55.5	8.2	2.0	2.7	2.0	3.0	1.4	1.4	2.3	4.1	0.6	100.0
Automotive fuel retailing	24.3	23.9	13.9	2.9	3.0	2.9	4.1	2.7	2.7	3.7	14.2	1.7	100.0
Other retail trade	24.5	24.1	13.9	2.8	3.0	2.8	4.1	2.7	2.7	3.7	14.0	1.6	100.0
Casinos and other gambling services	42.2	15.7	0.8	0.5	0.3	0.5	0.7	0.8	0.8	5.1	32.4	0.2	100.0
Libraries, museums and arts	25.9	18.0	11.4	0.9	0.5	0.9	1.1	1.3	1.3	1.7	35.8	1.1	100.0
Other entertainment services	40.6	20.8	8.3	1.2	0.7	1.2	1.8	2.4	2.4	2.3	17.7	0.5	100.0
Education	18.8	67.1	4.4	0.7	0.4	0.7	0.9	0.7	0.7	0.8	4.6	0.4	100.0
Ownership of dwellings	14.2	46.9	7.1	1.3	5.3	1.6	4.9	3.9	0.0	5.5	7.3	2.0	100.0
All other industries	18.2	41.1	9.2	2.1	5.1	2.1	4.3	2.2	2.2	2.5	10.3	0.8	100.0
Total	21.2	32.7	11.1	2.1	2.6	2.2	3.3	2.9	2.6	3.4	14.6	1.3	100.0

Tourism Employment

An employed person is a person 15 years or over who, during the reference week of the relevant Labour Force Survey:

- worked for one hour or more for pay, profit, commission or payment in kind in a job or business, or on a farm (comprising employees, employers and own account workers)
- worked for one hour or more without pay in a family business or on a farm (i.e. contributing family workers);
- were employees who had a job but were not at work and were: on paid leave; on leave without pay for less than four weeks up to the end of the reference week; stood down without pay because of bad weather or plant breakdown at their place of employment for less than four weeks up to the end of the reference week; on strike or locked out; on workers' compensation and expected to be returning to their job; or receiving wages or salary while undertaking full-time study;
- were employers, own account workers or contributing family workers who had a job, business or farm, but were not at work.

(ABS, 2009, p. 40)

At the national level, tourism employed persons is derived by using the tourism value added industry ratios⁷. In this report, employment at the destination level is derived using regional output shares to allocate the employment number in the state TSA into destinations.

Table 29 indicates that the number of persons employed in Queensland's tourism industry increased steadily between 2003–04 and 2007–08 with 122,600 employed in 2007–08. Brisbane with 29.4 per cent had the greatest tourism employment followed by The Gold Coast (22.9%), Tropical North Queensland (15.3%) and the Sunshine Coast (12.0%). As shown in Table 34, the industries that employed the greatest numbers in 2007–08 were Retail trade; Accommodation; Cafes, restaurants and food outlets; and Travel agency and tour operator services.

⁷ For more information, please see ABS (2009) Cat No. 5249.0, page 33.

Regional Economic Contribution of Tourism Destinations in Queensland

Table 29: Estimates of Regional Employment in Tourism

(’000 people)	2003-04	2006-07	2007-08
Gold Coast	27.5	28.0	28.1
Brisbane	25.2	32.8	36.1
Sunshine Coast	13.6	14.1	14.7
Hervey Bay/Maryborough	2.1	2.7	2.8
Darling Downs	3.3	3.3	3.0
Bundaberg	2.1	2.7	2.8
Fitzroy	3.1	3.4	4.1
Mackay	3.1	4.1	3.4
Whitsundays	3.1	4.1	3.4
Northern	3.5	3.8	4.0
Tropical North QLD	15.6	18.4	18.7
Outback	1.4	1.5	1.6
Total	103.6	118.9	122.6
(per cent)	2003-04	2006-07	2007-08
Gold Coast	26.5	23.6	22.9
Brisbane	24.3	27.6	29.4
Sunshine Coast	13.1	11.8	12.0
Hervey Bay/Maryborough	2.0	2.3	2.2
Darling Downs	3.2	2.8	2.5
Bundaberg	2.0	2.3	2.2
Fitzroy	3.0	2.9	3.3
Mackay	3.0	3.4	2.8
Whitsundays	3.0	3.4	2.8
Northern	3.4	3.2	3.2
Tropical North QLD	15.1	15.5	15.3
Outback	1.4	1.3	1.3
Total	100.0	100.0	100.0

Regional Economic Contribution of Tourism Destinations in Queensland

Table 30: Estimates of Tourism Employment by Industry and Destination 2003–04 ('000 people)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	0.56	1.77	0.29	0.05	0.06	0.05	0.10	0.22	0.22	0.13	1.18	0.02	4.67
Road transport and motor vehicle hiring	1.66	2.12	0.75	0.14	0.18	0.14	0.14	0.17	0.17	0.26	1.20	0.06	6.99
Air and water transport	0.46	2.21	0.21	0.05	0.05	0.05	0.08	0.15	0.15	0.16	0.74	0.03	4.34
Accommodation	5.23	2.59	3.33	0.33	0.45	0.33	0.47	0.63	0.63	0.59	2.80	0.38	17.77
Cafés and restaurants	3.70	1.83	2.36	0.23	0.32	0.23	0.33	0.45	0.45	0.42	1.98	0.27	12.58
Clubs, pubs, taverns and bars	1.67	0.83	1.07	0.10	0.15	0.10	0.15	0.20	0.20	0.19	0.90	0.12	5.68
Rail transport	0.03	0.22	0.01	0.01	0.01	0.01	0.03	0.01	0.01	0.02	0.07	0.01	0.44
Manufacturing	0.95	2.50	0.35	0.26	0.36	0.26	0.20	0.19	0.19	0.24	0.50	0.05	6.04
Retail trade	7.39	5.96	3.96	0.66	1.21	0.66	1.20	0.72	0.72	0.96	3.43	0.38	27.26
Casinos and other gambling services	0.30	0.12	0.01	0.00	0.00	0.00	0.00	0.01	0.01	0.03	0.14	0.00	0.62
Libraries, museums and arts	0.71	0.52	0.24	0.02	0.02	0.02	0.03	0.04	0.04	0.05	0.62	0.01	2.31
Other entertainment services	1.37	0.76	0.22	0.03	0.04	0.03	0.06	0.08	0.08	0.07	0.38	0.01	3.14
Education	2.00	1.31	0.23	0.03	0.21	0.03	0.08	0.06	0.06	0.09	0.73	0.01	4.85
Other Industry	1.42	2.40	0.54	0.19	0.27	0.19	0.28	0.15	0.15	0.27	0.95	0.10	6.91
Total	27.5	25.2	13.6	2.1	3.3	2.1	3.1	3.1	3.1	3.5	15.6	1.4	103.6

Regional Economic Contribution of Tourism Destinations in Queensland

Table 31: Tourism Employment Shares by Industry and Destination 2003–04 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	12.0	37.9	6.3	1.1	1.4	1.1	2.1	4.8	4.8	2.9	25.3	0.4	100.0
Road transport and motor vehicle hiring	23.8	30.3	10.7	2.1	2.6	2.1	2.0	2.4	2.4	3.7	17.2	0.8	100.0
Air and water transport	10.7	51.0	4.9	1.0	1.1	1.0	1.9	3.5	3.5	3.8	16.9	0.7	100.0
Accommodation	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100.0
Cafés and restaurants	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100.0
Clubs, pubs, taverns and bars	29.4	14.6	18.7	1.8	2.6	1.8	2.6	3.6	3.6	3.3	15.8	2.1	100.0
Rail transport	7.5	51.2	2.7	1.9	2.4	1.9	5.8	2.8	2.8	4.9	15.0	1.3	100.0
Manufacturing	15.7	41.5	5.7	4.3	6.0	4.3	3.3	3.1	3.1	3.9	8.3	0.9	100.0
Retail trade	27.1	21.9	14.5	2.4	4.4	2.4	4.4	2.6	2.6	3.5	12.6	1.4	100.0
Casinos and other gambling services	48.6	19.6	0.9	0.5	0.4	0.5	0.7	0.8	0.8	4.1	22.8	0.1	100.0
Libraries, museums and arts	30.6	22.6	10.6	0.8	1.0	0.8	1.3	1.6	1.6	2.0	26.9	0.3	100.0
Other entertainment services	43.7	24.1	7.1	1.0	1.3	1.0	1.9	2.6	2.6	2.4	12.1	0.2	100.0
Education	41.3	27.1	4.7	0.6	4.3	0.6	1.6	1.3	1.3	1.9	15.0	0.1	100.0
Other Industry	20.5	34.8	7.9	2.7	3.9	2.7	4.1	2.2	2.2	3.9	13.8	1.4	100.0
Total	26.5	24.3	13.1	2.0	3.2	2.0	3.0	3.0	3.0	3.4	15.1	1.4	100.0

Regional Economic Contribution of Tourism Destinations in Queensland

Table 32: Estimates of Tourism Employment by Industry and Destination 2006–07 ('000 people)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	0.73	1.67	0.23	0.13	0.08	0.13	0.04	0.30	0.30	0.02	3.12	0.19	6.94
Road transport and motor vehicle hiring	1.36	2.26	0.60	0.16	0.12	0.16	0.11	0.19	0.19	0.17	0.77	0.04	6.12
Air and water transport	0.61	3.14	0.32	0.07	0.06	0.07	0.12	0.22	0.22	0.24	0.92	0.05	6.06
Accommodation	5.34	4.21	3.43	0.48	0.51	0.48	0.68	0.86	0.86	0.70	2.74	0.21	20.49
Cafés and restaurants	3.67	2.89	2.35	0.33	0.35	0.33	0.47	0.59	0.59	0.48	1.88	0.14	14.09
Clubs, pubs, taverns and bars	1.71	1.35	1.10	0.15	0.17	0.15	0.22	0.28	0.28	0.22	0.88	0.07	6.58
Rail transport	0.05	0.42	0.02	0.03	0.03	0.03	0.06	0.04	0.04	0.03	0.09	0.03	0.86
Manufacturing	0.98	2.57	0.38	0.35	0.43	0.35	0.24	0.27	0.27	0.30	0.73	0.07	6.93
Retail trade	6.89	5.71	3.89	0.65	0.98	0.65	0.98	0.82	0.82	1.02	4.03	0.47	26.91
Casinos and other gambling services	0.22	0.08	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.02	0.15	0.00	0.49
Libraries, museums and arts	0.96	0.62	0.36	0.04	0.02	0.04	0.03	0.06	0.06	0.05	1.15	0.03	3.44
Other entertainment services	2.00	0.96	0.36	0.07	0.04	0.07	0.08	0.15	0.15	0.10	0.76	0.02	4.77
Education	1.59	3.82	0.15	0.06	0.11	0.06	0.10	0.11	0.11	0.08	0.21	0.04	6.44
Other Industry	1.89	3.07	0.86	0.21	0.39	0.21	0.30	0.19	0.19	0.32	0.97	0.16	8.77
Total	28.0	32.8	14.1	2.7	3.3	2.7	3.4	4.1	4.1	3.8	18.4	1.5	118.9

Regional Economic Contribution of Tourism Destinations in Queensland

Table 33: Tourism Employment Shares by Industry and Destination 2006–07 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	10.5	24.0	3.4	1.8	1.2	1.8	0.6	4.3	4.3	0.3	44.9	2.8	100.0
Road transport and motor vehicle hiring	22.3	36.9	9.8	2.6	1.9	2.6	1.8	3.1	3.1	2.8	12.6	0.6	100.0
Air and water transport	10.1	51.8	5.3	1.1	1.1	1.1	2.0	3.7	3.7	4.0	15.2	0.8	100.0
Accommodation	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100.0
Cafés and restaurants	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100.0
Clubs, pubs, taverns and bars	26.1	20.5	16.7	2.3	2.5	2.3	3.3	4.2	4.2	3.4	13.4	1.0	100.0
Rail transport	6.0	48.7	2.7	3.5	3.0	3.5	6.8	4.4	4.4	3.8	10.3	3.0	100.0
Manufacturing	14.1	37.0	5.4	5.1	6.2	5.1	3.4	3.9	3.9	4.4	10.5	1.0	100.0
Retail trade	25.6	21.2	14.5	2.4	3.7	2.4	3.6	3.1	3.1	3.8	15.0	1.7	100.0
Casinos and other gambling services	44.6	15.6	0.9	0.6	0.5	0.6	0.6	1.1	1.1	4.3	29.8	0.2	100.0
Libraries, museums and arts	28.0	18.2	10.5	1.1	0.6	1.1	1.0	1.9	1.9	1.5	33.3	0.8	100.0
Other entertainment services	42.0	20.1	7.6	1.5	0.8	1.5	1.6	3.2	3.2	2.1	15.9	0.5	100.0
Education	24.6	59.4	2.3	0.9	1.7	0.9	1.5	1.7	1.7	1.3	3.3	0.7	100.0
Other Industry	21.6	35.0	9.8	2.4	4.5	2.4	3.4	2.2	2.2	3.6	11.0	1.8	100.0
Total	23.6	27.6	11.8	2.3	2.8	2.3	2.9	3.4	3.4	3.2	15.5	1.3	100.0

Regional Economic Contribution of Tourism Destinations in Queensland

Table 34: Estimates of Tourism Employment by Industry and Destination 2007–08 ('000 people)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	0.85	1.68	0.20	0.07	0.08	0.07	0.25	0.19	0.19	0.05	3.64	0.11	7.36
Road transport and motor vehicle hiring	1.40	2.48	0.62	0.14	0.12	0.14	0.14	0.14	0.14	0.22	0.79	0.05	6.38
Air and water transport	0.62	3.28	0.31	0.07	0.06	0.07	0.13	0.22	0.22	0.26	0.94	0.04	6.21
Accommodation	5.59	4.26	3.62	0.49	0.44	0.49	0.74	0.70	0.70	0.77	2.45	0.34	20.59
Cafés and restaurants	3.95	3.01	2.56	0.34	0.31	0.34	0.53	0.49	0.49	0.55	1.73	0.24	14.56
Clubs, pubs, taverns and bars	1.73	1.32	1.12	0.15	0.14	0.15	0.23	0.22	0.22	0.24	0.76	0.10	6.37
Rail transport	0.06	0.51	0.03	0.02	0.03	0.02	0.06	0.03	0.03	0.05	0.10	0.03	0.97
Manufacturing	0.97	2.74	0.38	0.37	0.44	0.37	0.26	0.24	0.24	0.32	0.76	0.08	7.15
Retail trade	6.90	6.78	3.92	0.78	0.86	0.78	1.16	0.76	0.76	1.04	3.94	0.46	28.14
Casinos and other gambling services	0.24	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.19	0.00	0.58
Libraries, museums and arts	1.00	0.70	0.44	0.04	0.02	0.04	0.04	0.05	0.05	0.07	1.39	0.04	3.88
Other entertainment services	1.89	0.97	0.39	0.06	0.03	0.06	0.08	0.11	0.11	0.11	0.82	0.02	4.66
Education	1.29	4.60	0.30	0.05	0.02	0.05	0.06	0.05	0.05	0.05	0.31	0.03	6.85
Other Industry	1.62	3.66	0.82	0.19	0.45	0.19	0.39	0.19	0.19	0.22	0.92	0.08	8.92
Total	28.1	36.1	14.7	2.8	3.0	2.8	4.1	3.4	3.4	4.0	18.7	1.6	122.6

Regional Economic Contribution of Tourism Destinations in Queensland

Table 35: Tourism Employment Shares by Industry and Destination – 2007–08 (per cent)

	Gold Coast	Brisbane	Sunshine Coast	Hervey Bay Maryborough	Darling Downs	Bundaberg	Fitzroy	Mackay	Whitsundays	Northern	Tropical North QLD	Outback	Queensland Total
Travel agency and tour operator services	11.6	22.8	2.7	0.9	1.1	0.9	3.3	2.5	2.5	0.7	49.5	1.4	100.0
Road transport and motor vehicle hiring	22.0	38.8	9.7	2.1	1.9	2.1	2.2	2.3	2.3	3.4	12.4	0.8	100.0
Air and water transport	9.9	52.8	5.0	1.1	1.0	1.1	2.1	3.5	3.5	4.1	15.2	0.7	100.0
Accommodation	27.1	20.7	17.6	2.4	2.1	2.4	3.6	3.4	3.4	3.8	11.9	1.6	100.0
Cafés and restaurants	27.1	20.7	17.6	2.4	2.1	2.4	3.6	3.4	3.4	3.8	11.9	1.6	100.0
Clubs, pubs, taverns and bars	27.1	20.7	17.6	2.4	2.1	2.4	3.6	3.4	3.4	3.8	11.9	1.6	100.0
Rail transport	6.4	52.0	2.7	2.6	2.9	2.6	6.3	3.0	3.0	4.9	10.7	3.0	100.0
Manufacturing	13.6	38.3	5.3	5.1	6.2	5.1	3.6	3.3	3.3	4.5	10.7	1.1	100.0
Retail trade	24.5	24.1	13.9	2.8	3.0	2.8	4.1	2.7	2.7	3.7	14.0	1.6	100.0
Casinos and other gambling services	42.2	15.7	0.8	0.5	0.3	0.5	0.7	0.8	0.8	5.1	32.4	0.2	100.0
Libraries, museums and arts	25.9	18.0	11.4	0.9	0.5	0.9	1.1	1.3	1.3	1.7	35.8	1.1	100.0
Other entertainment services	40.6	20.8	8.3	1.2	0.7	1.2	1.8	2.4	2.4	2.3	17.7	0.5	100.0
Education	18.8	67.1	4.4	0.7	0.4	0.7	0.9	0.7	0.7	0.8	4.6	0.4	100.0
Other Industry	18.2	41.1	9.2	2.1	5.1	2.1	4.3	2.2	2.2	2.5	10.3	0.8	100.0
Total	22.9	29.4	12.0	2.2	2.5	2.2	3.3	2.8	2.8	3.2	15.3	1.3	100.0

Conclusion

As might be expected from the tourism expenditure data, Brisbane, the Gold Coast, Tropical North Queensland and the Sunshine Coast are the largest producers of tourism goods and services to the Queensland economy in terms of both value added and employment. In the case of Brisbane this is derived from a relatively even mixture of expenditure contribution of visitors from overseas, interstate, other regions of Queensland, and from within Brisbane itself. Perhaps this pattern is largely influenced by the role of the Brisbane City as a gateway from all outside origins to the state. The Gold Coast and the Sunshine Coast have similar patterns to one another, in which both receive a larger expenditure contribution from domestic than from overseas visitors with a very minimal share from their own residents. In contrast, the expenditure contribution of overseas visitors in Tropical North Queensland is very significant compared to other sources. For other smaller destinations, the main tourism expenditure contribution is from domestic, including inter-state, other regions of Queensland, and also from within those small destinations as well.

This report produces the first set of estimates of tourism's economic contribution at the destination level, in effect a regional TSA. The construction of these estimates should not be considered the end of the process but rather as the beginning of an ongoing process to unfold the importance of the tourism sector at a level relevant to policy makers. Regional estimates of tourism's economic contribution, or 'regional TSA' can be expected to generate policy relevant insights so that tourism activity can be adequately nurtured and stimulated at the right time and right place for sustainable regional economic development. This report presents the most fundamental regional tourism statistics which constitute the core of tourism satellite accounts at both national and state level. Although set in the context of regional Queensland, the approach adopted in this report can serve as a general guideline for further development of tourism statistics in other states of Australia and elsewhere.

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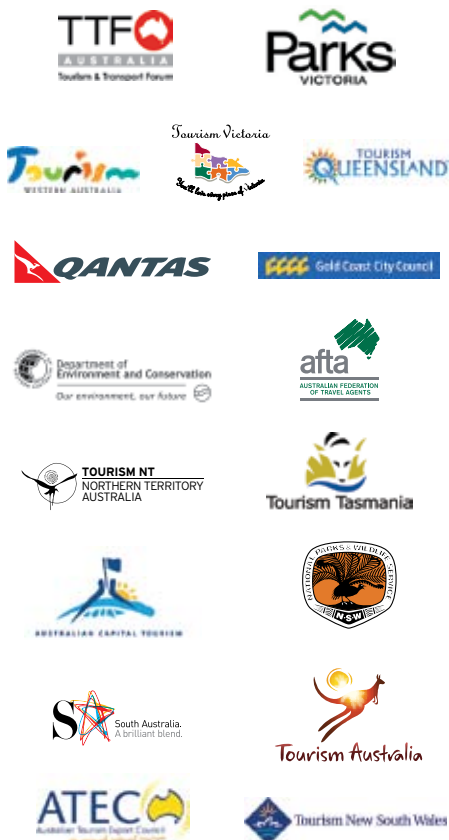
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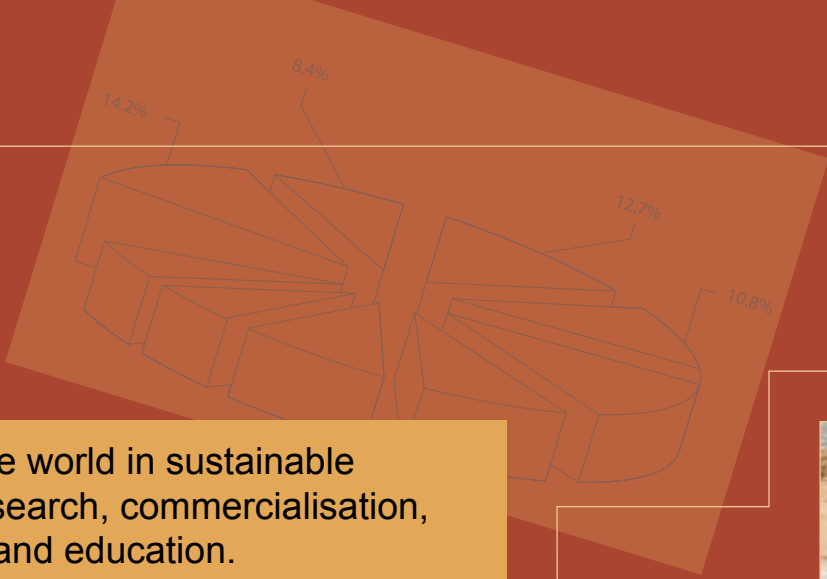
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