



Tasmania's Antarctic, sub-Antarctic and Southern Ocean sector 2011-2012

A snapshot of the sector's contribution to the Tasmanian economy

From a study by Blacklow Economic Consulting, jointly commissioned by the Tasmanian Government and the Tasmanian Polar Network

Hobart is an Antarctic gateway city, with direct air and sea access to East Antarctica and the greatest concentration in the world of Antarctic and Southern Ocean scientific expertise, polar businesses and infrastructure to service Antarctic expeditions. This combination makes Hobart unique among the gateway cities.

This study was commissioned to measure the value of the Antarctic sector to Tasmania in 2011/12.

What is the Antarctic sector?

Tasmania's Antarctic sector consists of Tasmanian-based organisations conducting business or research in the Antarctic, sub-Antarctic and Southern Ocean region, as well as those businesses supplying goods and services to Antarctic organisations both locally and internationally.

Who does the sector employ?

The Antarctic sector employed 1185 Tasmanians in 2011/12. The Antarctic organisations employed 756 and 429 were employed by business.

A further 473 jobs were created in the rest of Australia.

Wages in the sector are high. The average full time employee in an Antarctic research organisation earned \$118,400 per annum, compared with the average Tasmanian full time salary of \$63,590 per annum¹.

High wages means the sector has significant flow on effects as employees spend their wages. The study concluded that this could have created as many as 1600 additional Tasmanian jobs and 1400 jobs in the rest of Australia.

1. ABS 6302.0 – Average Weekly Earnings, Australia, Nov 2012 (seasonally adjusted)





How much do Antarctic research organisations spend in Tasmania?

In 2011/12 the Antarctic research organisations in Tasmania paid \$63.3 million in wages to their Tasmanian employees.

They spent another \$58 million buying goods and services from Tasmanian businesses.

What is the sector worth to the Tasmanian economy?

Gross State Product

The study found that the Antarctic sector contributed \$187.4 million to Tasmanian Gross State Product (GSP) in 2011/12.

The Antarctic organisations contributed \$142.5 million and the Antarctic businesses contributed \$44.9 million.

The sector contributed a further \$94.5 million to the GSP of the other Australian states; a total contribution to Australian GDP of \$237 million.

Flow on effects

The study found that the flow on effects of spending by employees in the sector led to a further contribution of \$256.9 million to Tasmanian GSP and \$193.5 million to GSP of the other Australian states.

Conferences and meetings

In 2011/12, the Antarctic Centennial Year, delegates to Antarctic conferences, forums and meetings in Hobart spent over 8,950 visitor nights in Tasmania, injecting an estimated \$2.75 million into the economy.

Summary

As an Antarctic gateway Tasmania has natural competitive advantages and the sector has potential for sustained growth. It makes a considerable contribution to Tasmania's economy and provides important employment opportunities for Tasmanians.

For more information on study results and methodology, contact antarctic@stategrowth.tas.gov.au

Full time
Antarctic sector
employee earnings

Average Antarctic
\$118,400

Average Tasmanian
\$63,590

At a glance

The Antarctic sector in Tasmania

GSP \$187.4m

Jobs 1185



2011/12 Value of Tasmanian Antarctic Sector – Quick Reference Table

Contribution of the sector to Gross State Product

Direct	\$142.5m	↑ 12% Since 2009/10	Contribution to GSP from spending by Tasmanian Antarctic science and research organisations.
Indirect	\$44.9m		Contribution to GSP derived when businesses supplying the Antarctic organisations buy goods & services in Tasmania.
Induced	\$256.9m		Contribution to GSP derived when Antarctic employees spend their wages in Tasmania
Direct and indirect	\$187.2m		Contribution to GSP from Antarctic organisations, plus GSP from businesses
Direct, indirect and induced	\$444.2m		Total contribution to Tasmanian GSP

Contribution of the sector to Tasmanian output

Direct	\$188.8m		Value of goods and services produced by Antarctic organisations (GSP plus revenue from Tas businesses plus imports)
Indirect	\$109.4m		Value of goods and services produced by businesses supplying the Antarctic organisations (GSP plus revenue from businesses in Tasmania supplying Antarctic organisations with goods & services
Induced	\$410.6m		Contribution to output when Antarctic employees spend their wages in Tasmania
Direct, indirect and induced	\$708.8m		Total contribution to Tasmanian output
Output to other states and territories: indirect	\$121.0m		Contribution to output when businesses supplying Antarctic organisations buy goods & services from other states & territories

Contribution of the sector to employment (actual)

Direct	756	↑ 15% Since 2009/10	Jobs within the Antarctic sector science and research organisations in Tasmania (0.25% of all Tasmanian jobs)
Indirect	429		Jobs in Tasmanian businesses supplying Tasmanian and other Antarctic organisations
Induced	1606		Jobs resulting from Antarctic employees spending their wages in Tasmania
Direct, indirect and induced	2791		Total Antarctic related jobs in Tasmania
Other states and territories, indirect	473		Jobs in businesses in other states and territories supplying Tasmanian Antarctic organisations with goods & services
Other states and territories, induced	1399		Jobs resulting from Antarctic employees spending their wages in other states & territories
Wages	\$63.3m	↑ 20% Since 2009/10	Money spent on wages by Antarctic organisations, excluding on-costs

Sector conferences and meetings

Visitor nights	8951		Total number of nights spent in Tasmania by visiting delegates to Antarctic and Southern Ocean conferences and meetings
Conferences	\$2.748m		Total visitor nights (8951)* average delegate spend per night (\$307 – Tourism Tasmania).

2011/12 Value of Tasmanian Antarctic Sector – Quick Reference Table (continued)

Contribution of the sector to Australian GDP

Direct	\$142.5m	Contribution to Australian GDP (including Tas) from Antarctic science and research organisations
Indirect	\$94.5m	Contribution to Australian GDP (including Tas) from businesses supplying Antarctic organisations
Induced	\$450.4m	Contribution to Australian GDP (including Tas) from spending by employees of Antarctic organisations
Direct, indirect and induced	\$687.4m	Total contribution to Australian GDP

Sector Multipliers

Tasmania, output, direct and indirect	1.639	Flow on effects generated by spending by Antarctic science and research organisations e.g. \$1 of government funding results in an additional \$0.639 of output in the Tasmanian economy.
Tasmania, output, direct, indirect and induced	3.896	Flow on effects generated by spending by Antarctic science and research organisations. \$1 of government funding results in an additional \$2.896 of output in the Tasmanian economy (\$0.639 from indirect effects & \$2.257 induced consumption spending from wages for Tasmania)
Australia, output, direct and indirect	2.304	Flow on effects generated by spending by Antarctic science and research organisations. Using this multiplier, each dollar spent results in an additional \$1.304 of output in the Australian economy
Australia, output, direct, indirect and induced	6.525	Flow on effects generated by spending by Antarctic science and research organisations. Each dollar spent results in \$5.525 of output in the Australian economy (\$1.304m from indirect effects for Australia & \$4.221m induced consumption spending from wages for Australia)



Department of State Growth

GPO Box 536 Hobart TAS 7001 Australia
 Phone: +61 1800 030 688
 Email: antarctic@stategrowth.tas.gov.au
 Web: www.antarctictasmania.com
 www.tasmanianpolarnetwork.com

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