

Summary Report

The contribution of the Antarctic and Southern Ocean Sector to the Tasmanian economy 2021-22

November 2023

Introduction

This report on *the Contribution of the Antarctic and Southern Ocean Sector to the Tasmanian Economy 2021-22* has been produced by the Department of State Growth, with input from across the Antarctic and Southern Ocean sector through a survey and direct consultation with stakeholders.

In compiling this report, the methodology of the 2019-20 report by Wells Economic Consulting was adopted. This report is a companion piece for Wells Economic Consulting reports for 2015-16, 2017-18 and a report by Blacklow Economic Consulting for 2011-12.

As a series, these reports highlight the growth of the Antarctic and Southern Ocean sector over the past decade and its overall importance to Tasmania.

Summary

In the two years since the last report (2019-20), there has been continued growth in the Antarctic and Southern Ocean sector in Tasmania. Total spending by the public-sector institutions has risen and employment has remained steady.

The findings for the *2021-22 Report* captures employment in the sector, as measured by Full-Time Equivalent (FTE). This measure provides a more accurate picture of the importance of the sector to the Tasmanian economy than Gross Value Added, which was used in reports before 2019-20.

Table 1 – Value of the Antarctic sector to Tasmania 2011-12 to 2021-22

Year	Expenditure by Antarctic organisations	Expenditure in Tasmania
2011-12	\$204.80 million	\$119.47 million
2015-16	\$196.16 million	\$117.01 million
2017-18	\$196.66 million	\$123.97 million
2019-20	\$230.36 million	\$159.39 million
2021-22	\$386.13 million	\$183.09 million

Note: Values are in 2021-22 prices.

Table 2 – Value of the Antarctic sector to Tasmania 2011-12 to 2021-22

Year	FTE	% Employment (TAS)	Antarctic Sector Wage % of TAS Avg. Wage	Conference Delegate & Expeditioner Exp. (\$m)	# PhD Students
2011-12	671	0.34%	131%	N/A	N/A
2015-16	755	0.38%	71%	N/A	N/A
2017-18	855	0.42%	181%	\$6.5	63
2019-20	947	0.47%	177%*	\$3.5	52
2021-22	993	0.43%	174%	N/A	N/A †

*Note that the percentage of 177 for 2019-20 differs from that reported in 2021 due to revisions to the ABS data.

† Note that reporting on conference delegate/expeditioner and PhD students was not included for the 2021-22 report.

In real terms, spending by public sector institutions in Tasmania has increased to \$183.09 million or 1.69 per cent of government consumption spending in Tasmania.

Employment

Employment has remained steady in both the public sector Antarctic institutions and in the private sector. The Antarctic and Southern Ocean sector as whole has remained an important component of total Tasmanian employment at 0.43 per cent.

FTE employment in the private sector has fallen from 290 to 262. This is considered to be reflective more of a decrease in survey responses from major private sector organisations than a real decrease in FTE employment.

The public sector share of FTE employment has risen from 528 to 731. With a wage bill of \$102.73 million, the implied average wage in the Antarctic and Southern Ocean sector was \$141,380, considerably higher than the comparable figure for Tasmania as a whole, which is \$80,871.

Conference delegates

Significant Antarctic and Southern Ocean sector conferences were held virtually in 2021-22, which yielded no direct expenditure from conference delegates. This category of spending has decreased from the 2019-20 report, which may be attributed to disruptions in the state from COVID-19 in 2021. It is expected that conference delegate expenditure will return to pre-COVID levels in future years.

Other measures

Expenditure and wages associated with expeditioners and PhD students based in Tasmania were discontinued for the survey and the 2021-22 report. The arrival of the RSV *Nuyina* in 2022 and ongoing involvement of international Antarctic programs in Tasmania are expected to increase Antarctic and Southern Ocean related expenditure in the future.

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