

Regional Tourism Satellite Account 2019-20






Topline Results for WA

Prepared by Tourism WA Strategy and Research
July 2021



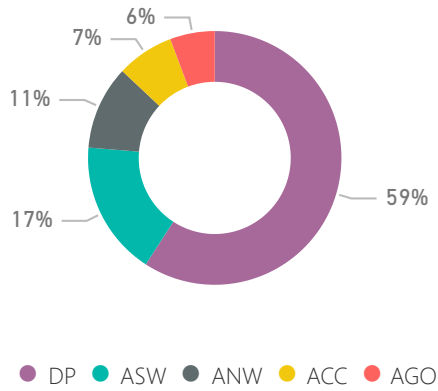
Regional Tourism Satellite Account (RTSA) 2019-20 - Gross Value Added (GVA)



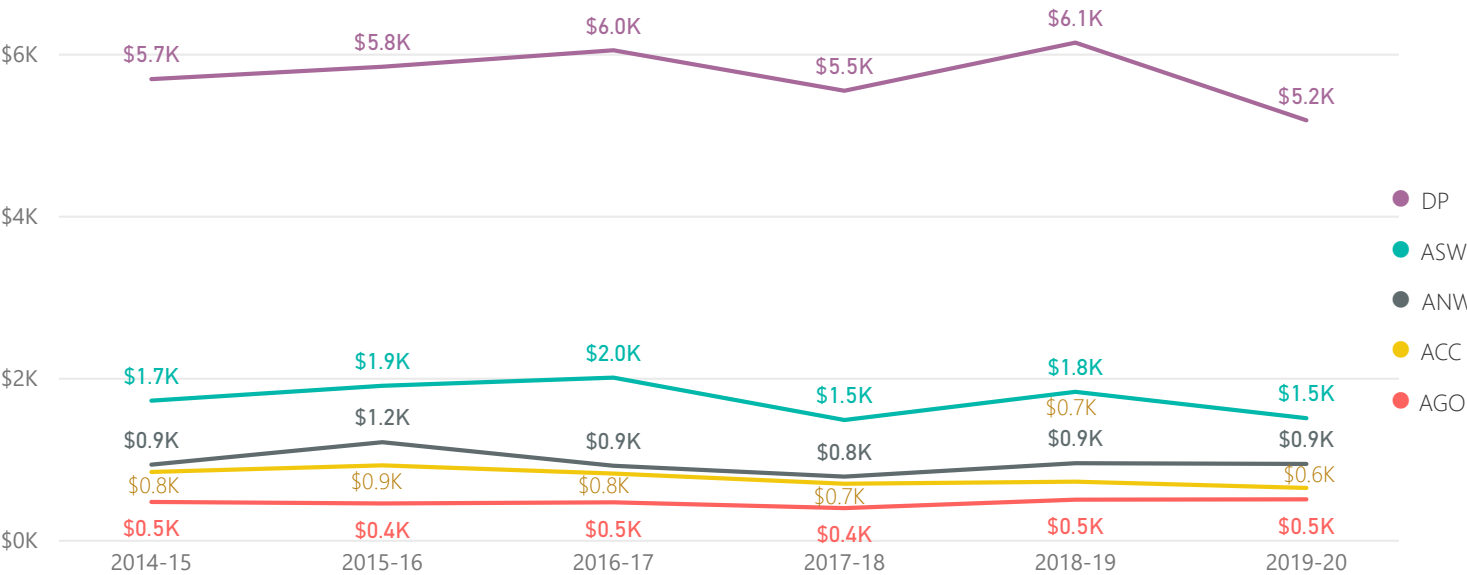
| Direct GVA | | Total (Direct + Indirect) GVA | |
|--|---|-------------------------------|----------------------------|
|  | Destination Perth (DP) | | |
| \$2,992 \$m | 1.5% % of total economy | \$5,177 \$m | 2.7% % of total economy |
|  | Australia's North West (ANW) | | |
| \$570 \$m | 0.9% % of total economy | \$936 \$m | 1.6% % of total economy |
|  | Australia's Coral Coast (ACC) | | |
| \$362 \$m | 5.5% % of total economy | \$639 \$m | 9.7% % of total economy |
|  | Australia's South West (ASW) | | |
| \$788 \$m | 4.8% % of total economy | \$1,500 \$m | 9.1% % of total economy |
|  | Australia's Golden Outback (AGO) | | |
| \$262 \$m | 1.0% % of total economy | \$499 \$m | 1.8% % of total economy |
|  | Regional Western Australia | | |
| \$1,983 \$m | 1.8% % of total economy | \$3,573 \$m | 3.2% % of total economy |
|  | Western Australia (WA) | | |
| \$4,975 \$m | 1.6% % of total economy | \$9,461 \$m | 3.1% % of total economy |

- In 2019-20, tourism (direct + indirect) in WA was worth \$9.5 billion by GVA, equivalent to 3.1% of WA's total GVA.
- In regional WA, tourism accounts for 3.2% of GVA compared to 2.7% in Destination Perth, demonstrating the importance of the tourism industry in Regional WA. This is particularly true for ACC and ASW where tourism accounts for 9.7% and 9.1% of GVA respectively.
- \$0.41 in every \$1 of WA's total (direct + indirect) tourism GVA is produced in regional WA.
- GVA in WA declined (-) 13.8% since 2018-19, impacted by COVID-19 and associated restrictions. ASW and DP saw the most significant declines (-17.8% and -15.6% respectively). ACC declined by (-) 10.8% and ANW by (-) 0.9%, whilst AGO saw a small growth (+) 0.9%.

Total GVA Split by Region



Total GVA over Time










Gross value added (GVA) allows easier comparisons across industries. GVA is the labour income and capital revenue received by the industry from tourism and the net taxes government receives from production.

Direct contribution is money spent directly in the tourism industry - with no tourism industry this money wouldn't be generated, or these people wouldn't be employed.

Indirect contribution is the flow-on effect of the tourism industry. In each of WA's regions, every dollar spent in the tourism industry, created additional value elsewhere in the economy.

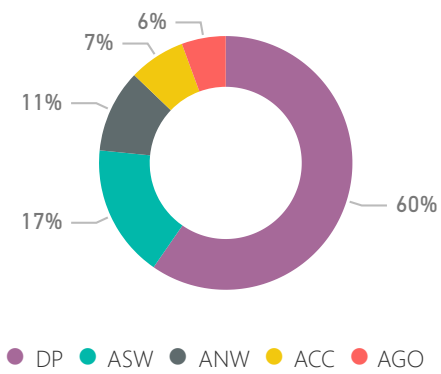
Regional Tourism Satellite Account (RTSA) 2019-20 - Gross Regional Product (GRP)



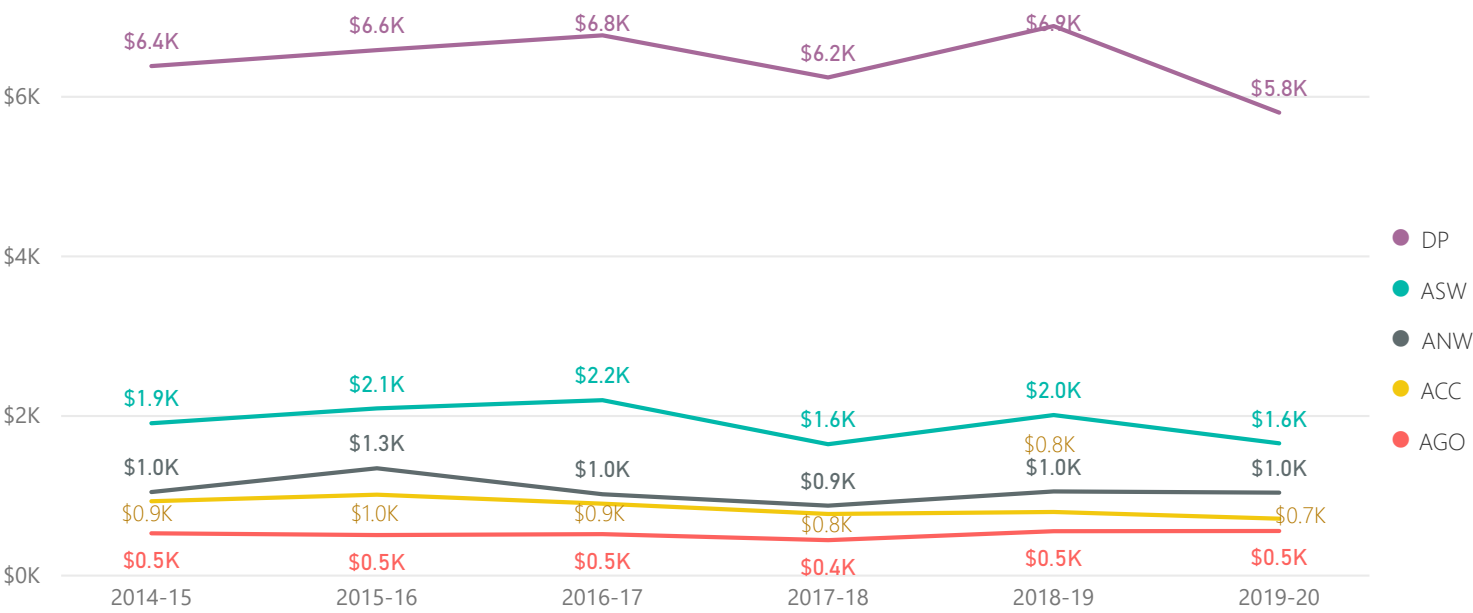
| Direct GRP | | Total (Direct + Indirect) GRP | |
|--|---|-------------------------------|-----------------------------|
|  | Destination Perth (DP) | | |
| \$3,291 \$m | 1.6% % of total economy | \$5,788 \$m | 2.9% % of total economy |
|  | Australia's North West (ANW) | | |
| \$608 \$m | 1.0% % of total economy | \$1,026 \$m | 1.6% % of total economy |
|  | Australia's Coral Coast (ACC) | | |
| \$383 \$m | 5.6% % of total economy | \$700 \$m | 10.3% % of total economy |
|  | Australia's South West (ASW) | | |
| \$830 \$m | 4.8% % of total economy | \$1,645 \$m | 9.6% % of total economy |
|  | Australia's Golden Outback (AGO) | | |
| \$275 \$m | 1.0% % of total economy | \$546 \$m | 2.0% % of total economy |
|  | Regional Western Australia | | |
| \$2,097 \$m | 1.8% % of total economy | \$3,917 \$m | 3.4% % of total economy |
|  | Western Australia (WA) | | |
| \$5,387 \$m | 1.7% % of total economy | \$10,520 \$m | 3.3% % of total economy |

- In 2019-20, tourism (direct + indirect) in WA was worth \$10.5 billion by GRP, equivalent to 3.3% of WA's total GRP.
- In regional WA, tourism accounts for 3.4% of GRP compared to 2.9% in Destination Perth, demonstrating the importance of the tourism industry in Regional WA. This is particularly true for ACC and ASW where tourism accounts for 10.3% and 9.6% of GRP respectively.
- \$0.40 in every \$1 of WA's total (direct + indirect) tourism GRP is produced in regional WA.
- GRP in WA declined (-) 13.9% since 2018-19, impacted by COVID-19 and associated restrictions. ASW and DP saw the most significant declines (-17.7% and -15.8% respectively). ACC declined by (-) 10.7% and ANW by (-) 1.4%, whilst AGO saw a small growth (+) 0.5%.

Total GRP Split by Region



Total GRP over Time






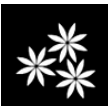



Gross regional product (GRP) allows easier comparisons across industries. GRP is GVA plus net taxes.

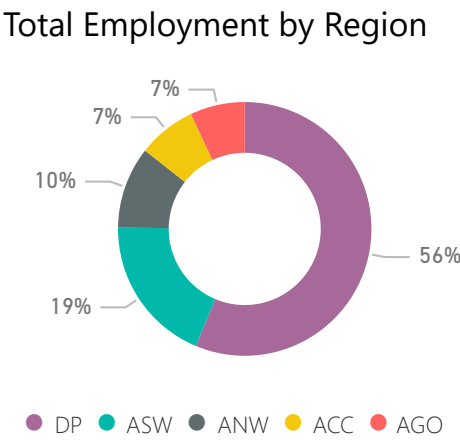
Direct contribution is money spent directly in the tourism industry - with no tourism industry this money wouldn't be generated, or these people wouldn't be employed.

Indirect contribution is the flow-on effect of the tourism industry. In each of WA's regions, every dollar spent in the tourism industry, created additional value elsewhere in the economy.

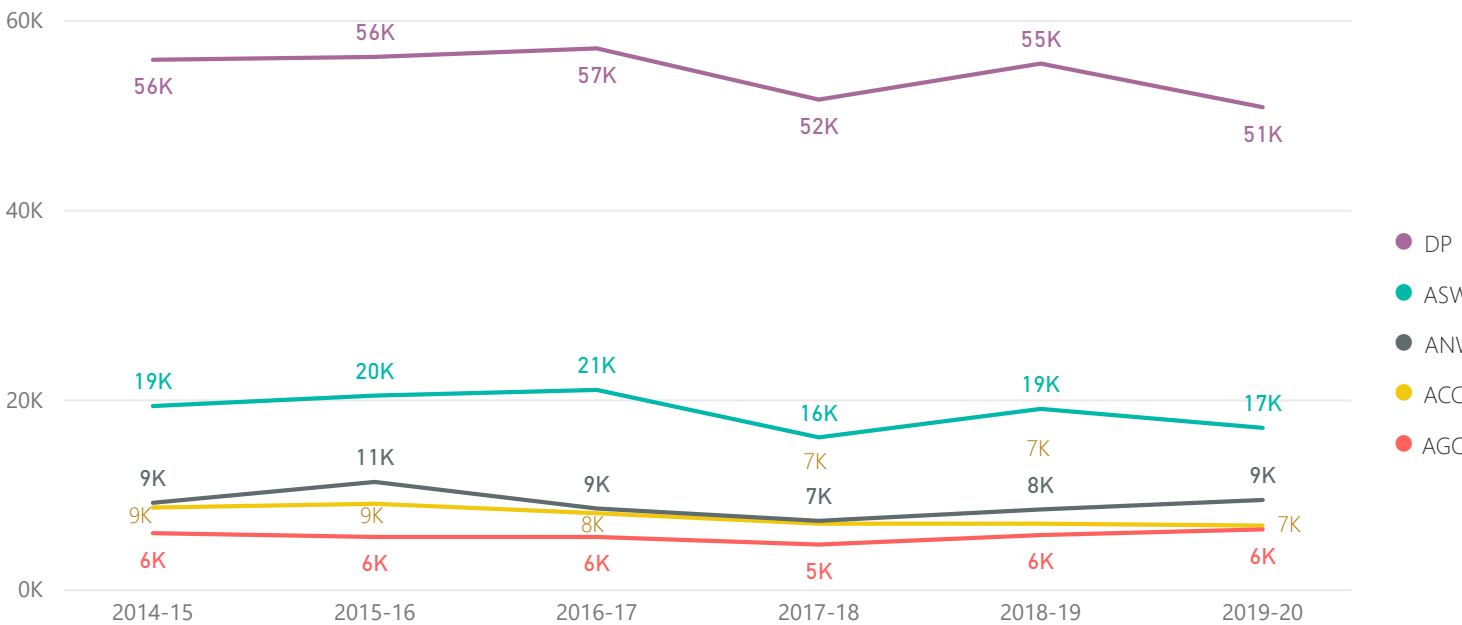
Regional Tourism Satellite Account (RTSA) 2019-20 - Employment

| Direct Employment | | Total (Direct+Indirect) Employment | | |
|--|-------------------|------------------------------------|-------------------|-----------------------------|
| Destination Perth (DP) | | | | |
|  | 36,800 Persons | 3.5% % of total economy | 50,800 Persons | 4.8% % of total economy |
| Australia's North West (ANW) | | | | |
|  | 7,000 Persons | 7.9% % of total economy | 9,400 Persons | 10.7% % of total economy |
| Australia's Coral Coast (ACC) | | | | |
|  | 4,900 Persons | 14.4% % of total economy | 6,700 Persons | 19.7% % of total economy |
| Australia's South West (ASW) | | | | |
|  | 12,300 Persons | 11.2% % of total economy | 17,000 Persons | 15.4% % of total economy |
| Australia's Golden Outback (AGO) | | | | |
|  | 4,700 Persons | 7.9% % of total economy | 6,300 Persons | 10.5% % of total economy |
| Regional Western Australia | | | | |
|  | 29,000 Persons | 9.9% % of total economy | 39,500 Persons | 13.5% % of total economy |
| Western Australia (WA) | | | | |
|  | 65,800 Persons | 4.9% % of total economy | 94,800 Persons | 7.0% % of total economy |

- In 2019-20, WA's tourism industry (directly + indirectly) employed 91,800 people in WA, equivalent to 7.0% of WA's total employment.
- In regional WA, tourism accounts for 13.5% of employment compared to 4.8% in DP, demonstrating the importance of the tourism industry in Regional WA. This is particularly true for ACC and ASW where tourism accounts for 19.7% and 15.4% of employment respectively.
- Over 4 in every 10 people employed in WA's tourism industry are based in Regional WA.
- Tourism employment in WA declined (-) 6.0% since 2018-19, impacted by COVID-19 and restrictions. ASW and DP saw the most significant declines (-10.5% and -8.3% respectively). ACC declined by (-) 2.9%, whilst AGO and ANW grew by 10.5% and 11.9% respectively.



Total Employment over Time



Employed person is aged 15+ who, during the reference week, worked for one hour + for pay (or similar) in a job, a business or on a farm, or without pay in a family business or farm.

Direct contribution is money spent directly in the tourism industry - with no tourism industry this money wouldn't be generated, or these people wouldn't be employed.

Indirect contribution is the flow-on effect of the tourism industry. In each of WA's regions, every dollar spent in the tourism industry, created additional value elsewhere in the economy.

Regional Tourism Satellite Account (RTSA) 2019-20 - Further Information

About this report

The Regional Tourism Satellite Accounts (RTSA) highlights the importance of tourism to the economy of each tourism region across Australia. The RTSA measures the direct and indirect impact of tourism across a number of measures including Gross Regional Product (GRP), Gross Value Added (GVA), and employment. The RTSA is based on the same inputs and principles used for the State Tourism Satellite Accounts, also developed by TRA. It should be noted that the sum of tourism regions will not always equate to total Western Australia, due to indirect effects of tourism consumption in Western Australia's tourism regions that are not allocated to a specific tourism region.

A recurring feature of the RTSA is that historical estimates for previous years are revised to reflect revisions to input data, such as changes in Australian Bureau of Statistics National Accounts data. TRA makes changes to previous time series estimates as required in each RTSA release, therefore the historic data presented in this report (for years 2015-16 to 2018-19) differs from that published in the 2018-19 report.

This report summarises key findings for Western Australia's five tourism regions from the 2019-20 RTSA, and is considered the most recent and accurate data on tourism's contribution to the WA economy. In this report, "Regional WA" is defined as all tourism regions excluding Destination Perth. For more information on the RTSA, and to access reports and data tables for each tourism region in Australia, visit [TRA's website](#).

Source and further information

All data presented in this report is sourced from Tourism Research Australia's (TRA) Regional Tourism Satellite Accounts 2019-20. For more information on the RTSA, and to access reports and data tables for each tourism region in Australia, visit [TRA's website](#).

For any queries about this summary, please contact the Tourism WA research team via research@westernaustralia.com.

Western Australia's Tourism Regions

