

Regional Tourism Satellite Account 2022-23

Topline Results for WA

Prepared by Tourism WA Insights and Planning
Based on data provided by Tourism Research Australia
August 2024






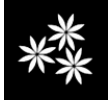



WESTERN
AUSTRALIA

Regional Tourism Satellite Account (RTSA) 2022-23 - Gross Value Added (GVA)

Direct GVA

Total (Direct + Indirect) GVA

| | | | | | |
|--|---|-----------------------|----------------------------|------------------------|----------------------------|
|  | Destination Perth (DP) | \$3,552 \$ million | 1.3% % of total economy | \$6,432 \$ million | 2.3% % of total economy |
|  | Australia's North West (ANW) | \$647 \$ million | 0.8% % of total economy | \$1,068 \$ million | 1.3% % of total economy |
|  | Australia's Coral Coast (ACC) | \$409 \$ million | 4.0% % of total economy | \$748 \$ million | 7.2% % of total economy |
|  | Australia's South West (ASW) | \$1,051 \$ million | 4.0% % of total economy | \$2,162 \$ million | 8.3% % of total economy |
|  | Australia's Golden Outback (AGO) | \$286 \$ million | 0.8% % of total economy | \$573 \$ million | 1.5% % of total economy |
|  | Regional Western Australia | \$2,393 \$ million | 1.6% % of total economy | \$4,551 \$ million | 3.0% % of total economy |
|  | Western Australia (WA) | \$5,944 \$ million | 1.4% % of total economy | \$11,941 \$ million | 2.8% % of total economy |

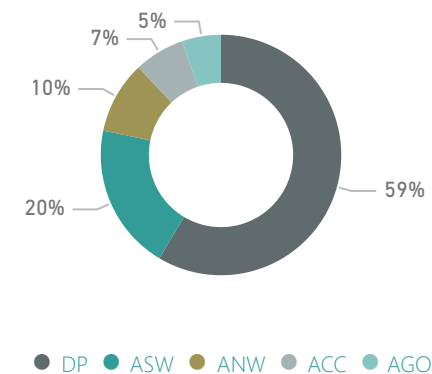
- In 2022-23, tourism (direct + indirect) in WA was worth \$11.9 billion by GVA, equivalent to 2.8% of WA's total GVA.

- Tourism accounted for a larger share of the total economy's GVA in Australia's South West (8.3%) and in Australia's Coral Coast (7.2%).

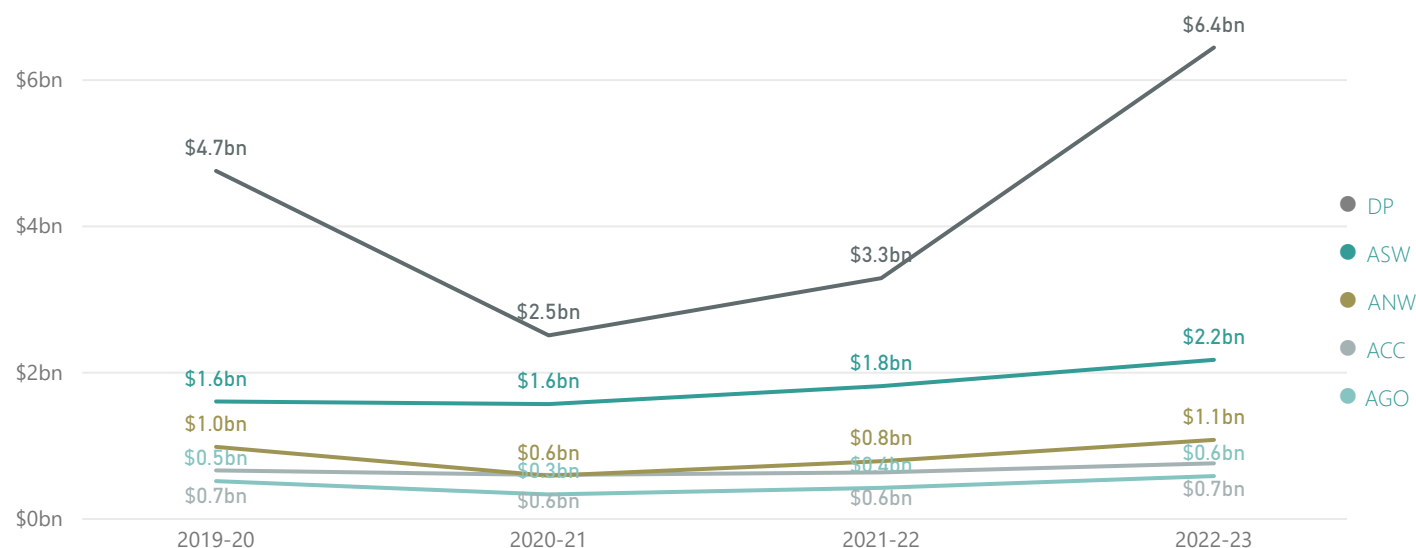
- In 2022-23, \$0.41 in every \$1 of WA's total (direct + indirect) tourism GVA was produced in regional WA.

- In 2022-23 each region saw growth in total GVA from the previous year which was significantly impacted by travel restrictions. Compared to 2019-20 as a benchmark, total GVA is up significantly in Destination Perth (+34%) and Regional WA (+16%).

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 jobs wouldn't exist.

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) 2022-23 - Gross Regional Product (GRP)

Direct GRP

Total (Direct + Indirect) GRP

| Region | Direct GRP (\$ million) | % of total economy | Total (Direct + Indirect) GRP (\$ million) | % of total economy |
|---|-------------------------|--------------------|--|--------------------|
|  Destination Perth (DP) | \$3,931 | 1.4% | \$7,134 | 2.5% |
|  Australia's North West (ANW) | \$711 | 0.9% | \$1,180 | 1.4% |
|  Australia's Coral Coast (ACC) | \$441 | 4.1% | \$819 | 7.6% |
|  Australia's South West (ASW) | \$1,135 | 4.2% | \$2,373 | 8.8% |
|  Australia's Golden Outback (AGO) | \$311 | 0.8% | \$631 | 1.6% |
|  Regional Western Australia | \$2,598 | 1.6% | \$5,003 | 3.1% |
|  Western Australia (WA) | \$6,529 | 1.5% | \$13,205 | 3.0% |

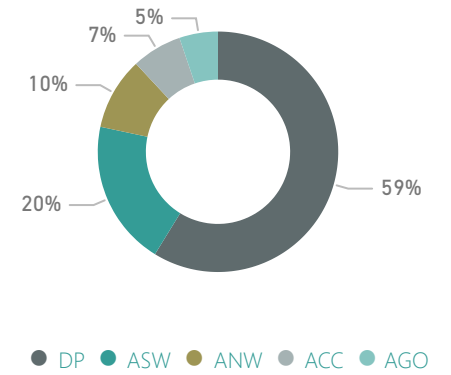
• In 2022-23, tourism (direct + indirect) in WA was worth \$13.2 billion by GRP, equivalent to 3.0% of WA's total Gross State Product.

• In regional WA, tourism accounted for 3.1% of GRP compared to 2.5% in Destination Perth, demonstrating the importance of the tourism industry in Regional WA. This is particularly true for ASW and ACC where tourism accounts for 8.8% and 7.6% of GRP respectively.

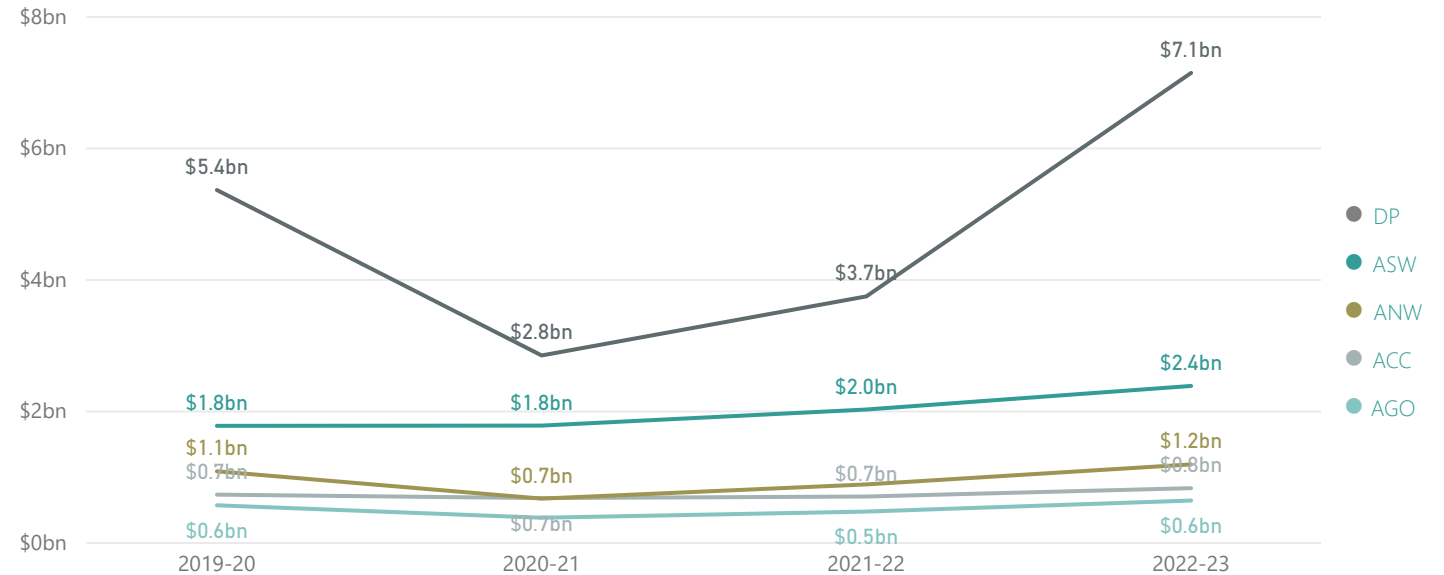
• In 2022-23 Destination Perth accounted for 59% of total tourism GRP in WA.

• In 2022-23 each region saw growth in total GRP vs. 2021-22, particularly Destination Perth which was significantly impacted by border restrictions during 2021-22 given its heavier reliance on inbound tourism. Compared to 2019-20 as a benchmark, total GRP is up (+) 34% in Destination Perth and up (+) 18% in Regional WA.

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 jobs wouldn't exist.

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) 2022-23 - Tourism Filled Jobs (jobs)

Direct Jobs

Total (Direct+Indirect) Jobs



Destination Perth (DP)

39,300 Jobs
3.1% % of total economy

60,700 Jobs
4.8% % of total economy



Australia's North West (ANW)

5,800 Jobs
5.4% % of total economy

8,900 Jobs
8.2% % of total economy



Australia's Coral Coast (ACC)

4,300 Jobs
10.5% % of total economy

6,800 Jobs
16.4% % of total economy



Australia's South West (ASW)

13,000 Jobs
9.7% % of total economy

21,000 Jobs
15.8% % of total economy



Australia's Golden Outback (AGO)

4,300 Jobs
5.8% % of total economy

6,400 Jobs
8.7% % of total economy



Regional Western Australia

27,400 Jobs
7.7% % of total economy

43,200 Jobs
12.1% % of total economy



Western Australia (WA)

66,700 Jobs
4.1% % of total economy

110,800 Jobs
6.8% % of total economy

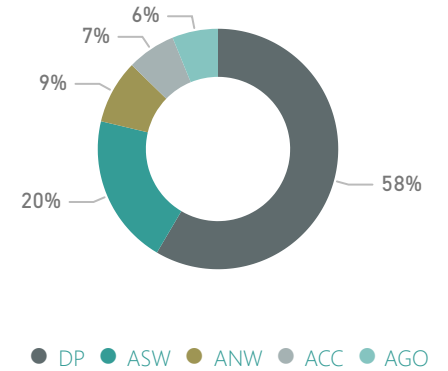
• In 2022-23, there were 110,800 (direct + indirect) tourism filled jobs in WA, equivalent to 6.8% of WA's total jobs.

• In regional WA, tourism accounted for 12.1% of jobs compared to 4.8% in DP. Tourism accounts for the largest proportion of jobs in Australia's Coral Coast (16.4%).

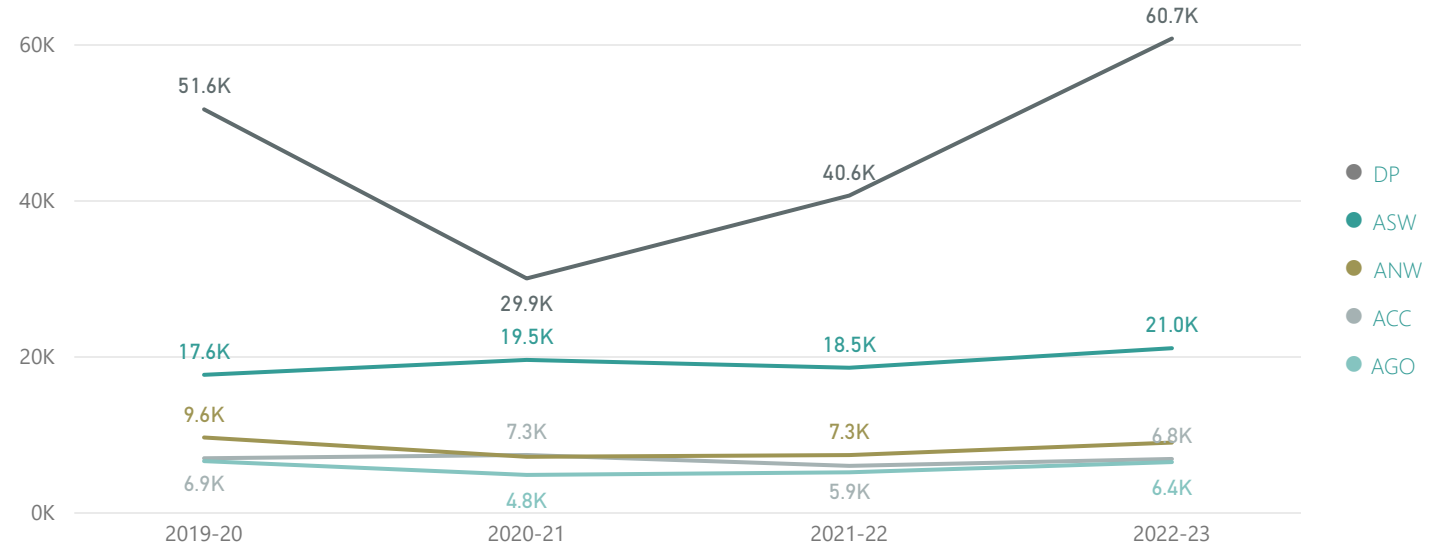
• More than two in five tourism filled jobs were based in regional WA.

• In 2022-23 each region saw growth in tourism filled jobs from the previous year, which was heavily impacted by travel restrictions. Compared to 2019-20 as a benchmark, the number of tourism filled jobs is up in (+) 9% in Destination Perth but down (-) 3% in Regional WA.

Tourism Filled Jobs by Region



Total Tourism Filled Jobs over Time



Tourism filled jobs refers to all positions of employment which are currently filled as a result of WA's tourism industry. Includes secondary jobs.

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

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) 2022-23 - Further Information

Source and further information

All data presented in this report is sourced from Tourism Research Australia's (TRA) Regional Tourism Satellite Accounts 2022-23. For more information on the RTSA, and to access reports and data tables for each tourism region in Australia, visit tra.gov.au.

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

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 tourism filled jobs (jobs). 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 2019-20 to 2021-22) differs from that published in the 2021-22 report. Due to methodological changes, comparisons to results for years prior to 2019-20 is not possible.

This report summarises key findings for Western Australia's five tourism regions from the 2022-23 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.gov.au.

Western Australia's Tourism Regions

