

TOURISM AND THE AUSTRALIAN ECONOMY

STATE & TERRITORY VISITOR ECONOMY IMPACTS | 2012-13 EDITION



Tourism as an economic growth strategy

Tourism has been identified as one of five super growth sectors that have the potential to collectively add \$250 billion to the Australian economy over the next 20 years.

Positioned well to capture the demand of the emerging Asian middleclass, tourism is an economic development strategy for Australia.

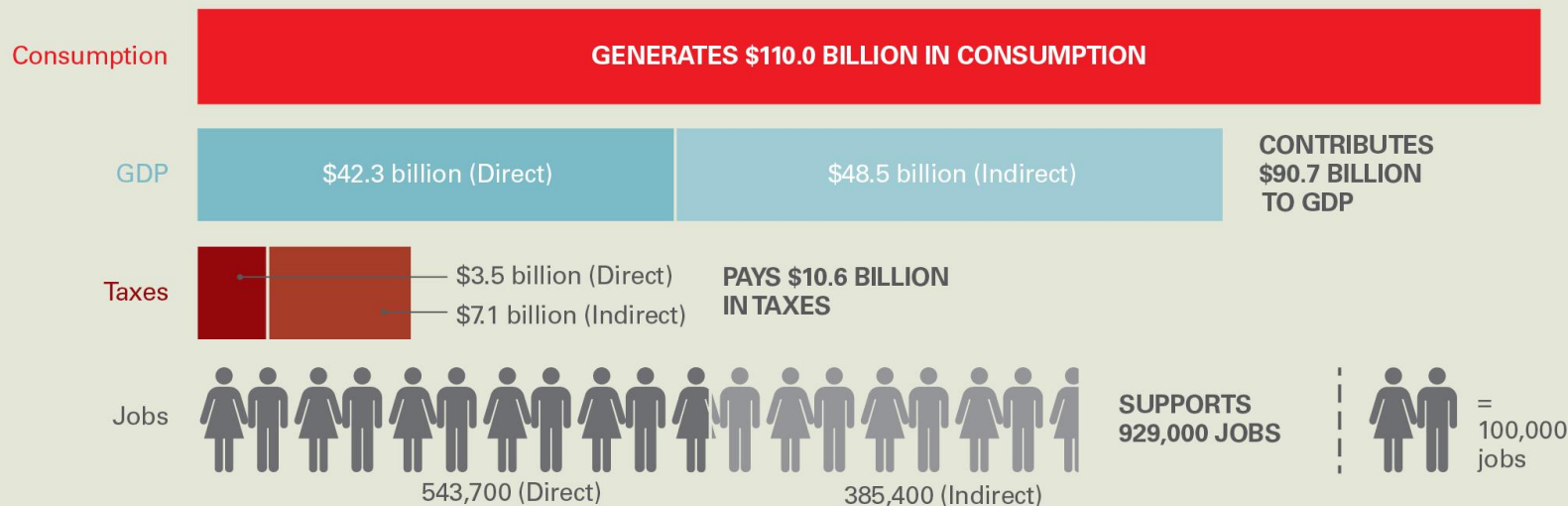
Figure 8: Australia's current, next and future waves of growth, 2013–33



Source: Deloitte Access Economics (2014) – *Positioning for prosperity? Catching the next wave*

Australian visitor economy impacts

AUSTRALIAN VISITOR ECONOMY IMPACTS



Sources: Tourism Research Australia (2014), *State Tourism Satellite Accounts 2012-13*

Australian visitor economy impacts

- **\$110.0 billion in consumption** – Consumption by visitors in 2012-13.
- **\$90.7 billion in GDP** – Tourism’s contribution to GDP in 2012-13, including \$42.3 billion in direct GDP and another \$48.5 billion in indirect GDP, representing a total 6.0% share of the Australian economy.
- **280,000 businesses** – Tourism supports over 280,000 businesses, representing 13% of all businesses in Australia. Small businesses (<19 employees) form 90% of the industry, though medium and large businesses generate 68% of the industry’s revenue.
- **929,000 jobs** – Australian jobs supported by visitor expenditure in 2012-13 include 543,700 jobs directly in the tourism industry and another 385,400 jobs in related industries, representing 1 in every 12 jobs across the country.
- **\$10.6 billion in taxes** – Total tax revenue generated by visitor expenditure in Australia in 2012-13. Each Australian household would have paid \$1,207 more in taxes without the tourism tax revenue.

Sources: ABS (2013) – *Tourism Satellite Account, 2012-13*; Tourism Research Australia (2014) – *State Tourism Satellite Accounts, 2012-13*; ABS (2013) – *Australian System of National Accounts, 2011-12*; ABS (2013) – *International Trade in Goods and Services, June 2013*; Tourism Research Australia (2013) – *Tourism Businesses in Australia, June 2010 to June 2012*; ABS (2013) – *Labour Force, Australia, Detailed, Quarterly, May 2013*; ABS (2010) – *Household and Family Projections, 2006 to 2031*;

The value of tourism relative to other industries

- **\$38.8 billion in GVA** – Tourism generates greater gross value added than agriculture, forestry and fishing combined.
- **\$27.0 billion in exports** – Consumption by international visitors constitutes Australia's largest services export, representing 8.9% of total exports.

AUSTRALIAN INDUSTRIES	GVA	%
Agriculture, forestry and fishing	\$31.9 b	2.2%
Mining	\$146.4 b	10.3%
Manufacturing	\$103.6 b	7.3%
Electricity, gas, water and waste services	\$37.6 b	2.6%
Construction	\$115.4 b	8.1%
Wholesale trade	\$64.6 b	4.5%
Retail trade	\$68.5 b	4.8%
Accommodation and food services	\$34.9 b	2.4%
Transport, postal and warehousing	\$72.9 b	5.1%
Information media and telecommunications	\$41.0 b	2.9%
Financial and insurance services	\$121.6 b	8.5%
Rental, hiring and real estate services	\$38.9 b	2.7%
Professional, scientific and technical services	\$100.0 b	7.0%
Administrative and support services	\$44.7 b	3.1%
Public administration and safety	\$78.8 b	5.5%
Education and training	\$68.6 b	4.8%
Health care and social assistance	\$96.7 b	6.8%
Arts and recreation services	\$12.1 b	0.8%
Other services	\$26.5 b	1.9%
ALL INDUSTRIES	\$1,427.8 b	100.0%
TOURISM RELATED INDUSTRIES	\$38.8 b	2.7%

AUSTRALIAN EXPORTS	GVA	%
GOODS EXPORTS	\$249.0 b	82.5%
Meat and meat preparations	\$7.6 b	2.5%
Cereal grains and cereal preparations	\$9.3 b	3.1%
Wool and sheepskins	\$2.9 b	1.0%
Other rural	\$16.5 b	5.5%
Metal ores and minerals	\$79.2 b	26.3%
Coal, coke and briquettes	\$38.9 b	12.9%
Other mineral fuels	\$26.4 b	8.8%
Metals (excl. non-monetary gold)	\$10.5 b	3.5%
Machinery	\$8.7 b	2.9%
Transport equipment	\$4.3 b	1.4%
Other manufactures	\$16.0 b	5.3%
Other non-rural (incl. sugar and beverages)	\$10.4 b	3.5%
Goods procured in ports by carriers	\$1.7 b	0.6%
Net exports of goods under merchanting	\$0.3 b	0.1%
Non-monetary gold	\$16.2 b	5.4%
SERVICES EXPORTS	\$52.7 b	17.5%
Manufacturing services on physical inputs owned by others	\$0.0 b	0.0%
Maintenance and repair services	\$0.1 b	0.0%
Transport	\$6.1 b	2.0%
Travel	\$31.2 b	10.4%
Construction	\$0.0 b	0.0%
Insurance and pension services	\$0.5 b	0.2%
Financial services	\$2.1 b	0.7%
Charges for the use of intellectual property	\$0.8 b	0.3%
Telecommunications, computer and information services	\$1.8 b	0.6%
Other business services	\$8.4 b	2.8%
Personal, cultural and recreational services	\$0.8 b	0.3%
Government goods and services	\$0.9 b	0.3%
GOODS AND SERVICES EXPORTS	\$301.8 b	100.0%
TOURISM EXPORTS	\$27.0 b	8.9%

Source: ABS (2013) – *Australian National Accounts: Tourism Satellite Account, 2012-13*; ABS (2013) – *International Trade in Goods and Services, Australia, Jun 2013*; ABS (2013) – *Australian System of National Accounts, 2012-13*; ABS (2013) – *Labour Force, Australia, Detailed, Quarterly, May 2013*

State and territory visitor economy impacts

2012-13

WHOLE ECONOMY	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	AUS
Gross state/domestic product (GSP/GDP, \$m)	476,434	337,493	290,158	95,123	242,697	24,360	20,113	35,088	1,521,466
Gross value added (GVA, \$m)	441,678	311,806	272,791	88,507	232,920	22,731	19,239	33,508	1,423,180
Net taxes on products (\$m)	34,756	25,687	17,367	6,616	9,777	1,629	874	1,580	98,286
Employed persons ('000)	3,632	2,885	2,347	817	1,315	232	125	209	11,563

DIRECT TOURISM CONTRIBUTION

Tourism GSP/GDP (\$m)	13,303	8,776	10,925	2,221	4,215	1,053	910	852	42,255
Tourism GSP/GDP (%)	2.8%	2.6%	3.8%	2.3%	1.7%	4.3%	4.5%	2.4%	2.0%
Tourism GVA (\$m)	12,237	8,097	9,973	2,047	3,867	961	821	781	38,783
Tourism GVA (%)	2.8%	2.6%	3.7%	2.3%	1.7%	4.2%	4.3%	2.3%	2.7%
Tourism net taxes on products (\$m)	1,066	678	951	174	348	93	89	72	3,472
Tourism net taxes on products (%)	3.1%	2.7%	5.5%	2.6%	3.6%	5.7%	9.9%	4.6%	3.5%
Tourism employed persons ('000)	158	124	140	31	57	17	8	10	544
Tourism employed persons (%)	4.4%	4.3%	5.9%	3.8%	4.3%	7.2%	6.6%	4.7%	4.7%

INDIRECT TOURISM CONTRIBUTION

Tourism GSP/GDP (\$m)	15,086	10,867	12,048	2,732	4,541	1,322	917	943	48,457
Tourism GSP/GDP (%)	3.2%	3.2%	4.2%	2.9%	1.9%	5.4%	4.6%	2.7%	3.2%
Tourism GVA (\$m)	12,826	9,078	10,449	2,349	3,894	1,138	838	738	41,309
Tourism GVA (%)	2.9%	2.9%	3.8%	2.7%	1.7%	5.0%	4.4%	2.2%	2.9%
Tourism net taxes on products (\$m)	2,260	1,790	1,599	382	648	184	79	205	7,148
Tourism net taxes on products (%)	6.5%	7.0%	9.2%	5.8%	6.6%	11.3%	9.0%	13.0%	7.3%
Tourism employed persons ('000)	109	79	101	23	34	24	8	7	385
Tourism employed persons (%)	3.0%	2.7%	4.3%	2.8%	2.6%	10.3%	6.3%	3.6%	3.3%

TOTAL TOURISM CONTRIBUTION

Tourism GSP/GDP (\$m)	28,389	19,643	22,973	4,952	8,756	2,376	1,827	1,795	90,712
Tourism GSP/GDP (%)	6.0%	5.8%	7.9%	5.2%	3.6%	9.8%	9.1%	5.1%	6.0%
Tourism GVA (\$m)	25,062	17,175	20,422	4,396	7,761	2,099	1,659	1,518	80,092
Tourism GVA (%)	5.7%	5.5%	7.5%	5.0%	3.3%	9.2%	8.6%	4.5%	5.6%
Tourism net taxes on products (\$m)	3,327	2,468	2,551	556	996	277	168	277	10,620
Tourism net taxes on products (%)	9.6%	9.6%	14.7%	8.4%	10.2%	17.0%	19.2%	17.5%	10.8%
Tourism employed persons ('000)	267	203	241	54	91	40	16	17	929
Tourism employed persons (%)	7.3%	7.0%	10.3%	6.6%	6.9%	17.4%	12.9%	8.2%	8.0%

Source: Tourism Research Australia (2014) – *State Tourism Satellite Accounts, 2012-13*