

Economic Contribution of Tourism to Victoria 2021-22

2021-22 State Tourism Satellite Account Results

Estimates published by Tourism Research Australia

Report produced by the Tourism and Events Research unit

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State Tourism Satellite Account (STSA) estimates in this publication are not comparable to the previously published STSA estimates due to data input changes.

This includes a revised approach to employment metrics which has created a major shift in the time series due to the adoption of 'filled jobs' from the Labour Account rather than 'employed persons' based on the Labour Force survey.

The most recent results from the STSA should only be compared to the revised time series to ensure like-for-like comparisons.

Refer to the [data notes](#) for further information.



We acknowledge the Traditional Aboriginal Owners of Country throughout Victoria and pay our respect to them, their connections to land, sea, and community. We pay our respects to their Elders past and present and future Traditional Owners.

Economic contribution of tourism to Victoria 2021-22

Tourism in Victoria was estimated to be worth \$16.0 billion to the economy in GSP and generated approximately 171,100 tourism filled jobs in 2021-22. These results reflect the beginning of the rebound in tourism activity from the first half of 2022 and note large increases in key economic metrics from 2020-21 which was severely impacted by COVID; however, results remain below the pre-pandemic performance.



Tourism GSP

\$16.0 billion

↑57.8% FY21/22 ↓45.7% FY19/22



Tourism filled jobs

171,100

↑56.4% FY21/22 ↓39.8% FY19/22



Tourism GVA

\$14.1 billion

↑57.7% FY21/22 ↓46.9% FY19/22

Summary Overview

- The tourism sector suffered severe disruptions during the COVID pandemic. This 2021-22 edition of the STSA reflects the impacts of some of these disruptions on the tourism industry in this period including international and state border closures and other movement restrictions. However, a recovery in tourism activity was underway in 2022 supported by strong pent-up demand to travel as borders reopened and restrictions eased, fuelled by strong growth in the domestic sector, with a slower return to international tourism.
- Victoria has noted an improvement in key tourism economic indicators in these 2021-22 results compared to a more challenging period in 2020-21, however results were lower than 2018-19 (pre-pandemic).
- In 2021-22 tourism was worth \$16.0 billion to the Victorian economy in GSP, up \$5.8 billion (+57.8%) compared to 2020-21 although lower than the pre-COVID estimates of 2018-19 (-45.7%). This was larger than the rates of decline noted nationally (-38.0%) and Queensland (-23.6%) although slightly below the decline in New South Wales (-47.4%) in the pre-COVID comparison period (2018-19 to 2021-22).
- The decline in tourism GSP was against the overall growth trend for GSP in the Victorian economy compared to 2018-19 (+11.7%), reflecting the disproportionate impact of the pandemic on the tourism sector relative to other industries in the state.
- Tourism's overall contribution to Victorian GSP has regained share up from 2.1% in 2020-21 to 3.1% in 2021-22. However, this remains below the pre-pandemic share of 6.4% in 2018-19 (-3.3% points).
- A revised approach to employment metrics has been taken in this STSA release which has created a major shift in the time series due to the adoption of filled jobs from the Labour Account rather than employed persons based on the Labour Force survey (refer [data notes](#)).
- Overall tourism filled jobs have rebounded to 171,100 in 2021-22 from 109,400 in 2020-21 (+56.4%) reflecting the tourism recovery underway. However this remained well below the pre-pandemic result of 284,400 tourism filled jobs in 2018-19 (-39.8%). Tourism jobs were down 32.2% nationally compared to 2018-19, with a higher rate of decline recorded in New South Wales (-45.0%).
- The decline in tourism filled jobs compared to 2018-19 was in contrast to overall growth in filled jobs the Victorian economy in the same period (+3.1%). As such, tourism's contribution to filled jobs in Victoria has fallen from 8.0% in 2018-19 to 4.7% in 2021-22 (down 3.3% points), although this was an improvement from 2020-21 which recorded a 3.1% share of tourism filled jobs in Victoria.

Economic contribution of tourism to Victoria 2021-22

Gross State Product (GSP)

Tourism's contribution to Victoria's GSP has increased from the low of 2020-21 to \$16.0 billion in 2021-22, up \$5.8 billion, although remains \$13.4 billion below the 2018-19 estimate (pre-pandemic).

- In 2021-22, tourism directly contributed \$7.6 billion to the Victorian economy. Direct tourism GSP was 61.6% above the 2020-21 estimate however was down 48.2% from the pre-pandemic 2018-19 result.
- Tourism generated a 1.5% direct share of GSP in the state, up from 1.0% in 2020-21 (although down 1.7% points from 2018-19).
- Tourism contributes to Victoria's economy indirectly through the flow on effects of spending by visitors. For example, this might include the fresh produce supplied to a hotel to deliver meals to guests.
- For every dollar spent directly on tourism in the Victorian economy, an additional 84 cents was spent indirectly elsewhere in the economy.
- Tourism indirectly contributed an additional \$8.4 billion in GSP to the Victorian economy in 2021-22, up 54.5% from 2020-21, although was 43.2% less than the 2018-19 estimate.
- In total, tourism in Victoria was worth \$16.0 billion in GSP, recording an increase of 57.8% compared to 2020-21. However, this result was 45.7% below the 2018-19 estimate.
- Tourism's share of Victoria's GSP has increased from a low of 2.1% in 2020-21 to 3.1% in 2021-22. Tourism's share of GSP remains below its pre-pandemic contribution of 6.4% in 2018-19.

Chart 1. Tourism's % contribution to Victorian GSP 2016-17 to 2021-22

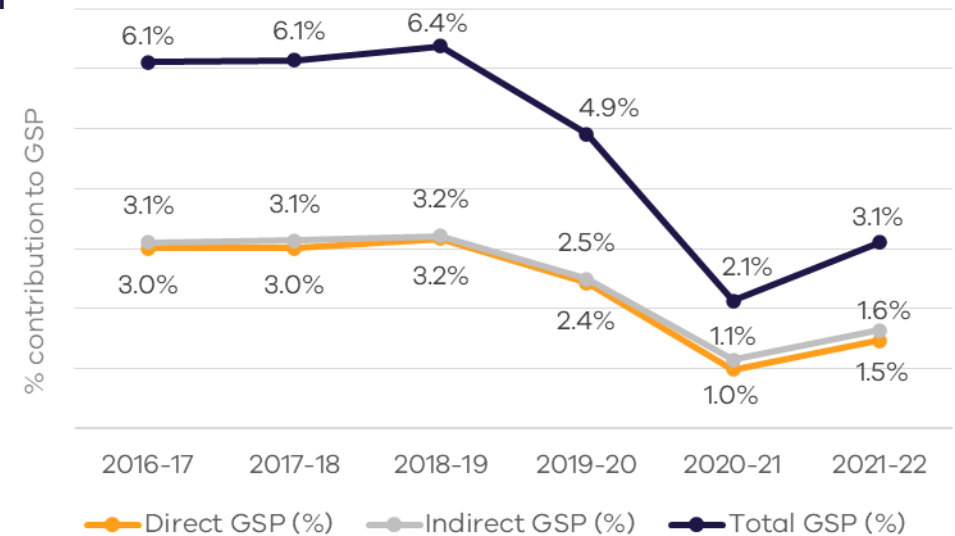
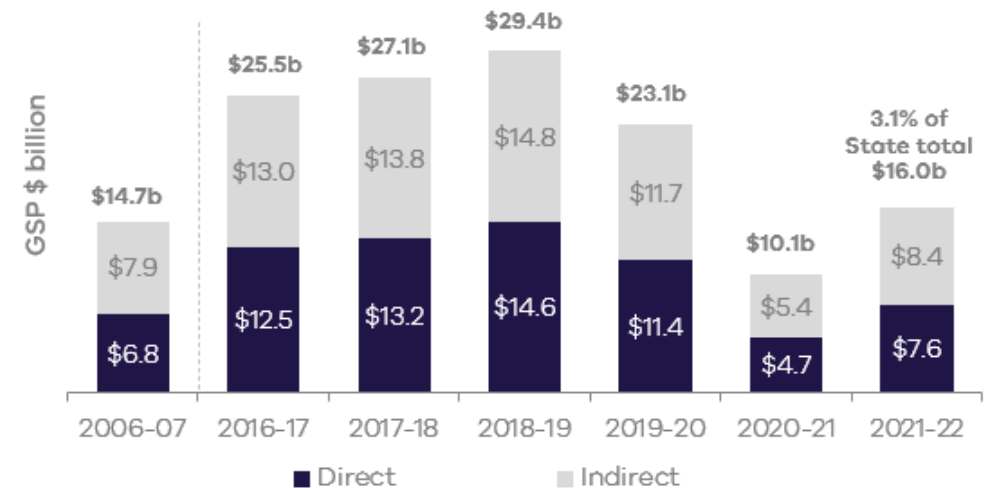


Chart 2. Tourism's contribution to Victoria GSP



Economic contribution of tourism to Victoria 2021-22

Gross Value Added (GVA)

Tourism's contribution to Victoria's GVA was worth \$14.1 billion in 2021-22, an increase of \$5.1 billion on 2020-21, however was below the pre-pandemic estimate.

- The contribution of tourism to the Victorian economy is best measured by GVA which is also the best measure for comparisons to other industries. Tourism GVA measures the value of production exclusive of product taxes such as the GST.
- The Victorian tourism industry directly accounted for \$6.9 billion in GVA in 2021-22, noting an increase of 58.9% from 2020-21, although remained 48.4% below the pre-pandemic 2018-19 estimate. This accounted for 1.4% of direct industry GVA in Victoria during 2021-22, up from 1.0% in 2020-21 (although down 1.7% points from 2018-19).
- As noted in chart 3, in 2021-22 direct GVA in Victoria was largely made up of domestic travel due to international border closures until February 2022 at \$6.1 billion (88.6% of direct GVA). This comprised of:
 - Intrastate overnight travel - \$3.2 billion (46.5%)
 - Interstate overnight travel - \$1.5 billion (21.7%)
 - Daytrips - \$1.4 billion (20.4%).
- In comparison, international travel made up 11.4% of direct tourism GVA at \$0.8 billion, due to the limited volume of international visitors in 2021-22.
- The largest loss in direct GVA in Victoria in 2021-22 compared to the pre-pandemic 2018-19 estimate was noted from the international component (down \$3.8 billion), with a large decline also noted in the interstate overnight category (down \$1.6 billion), followed by intrastate overnight (down \$673 million), with the domestic daytrip category also noting a decline (down \$352 million).
- Tourism indirectly contributed an additional \$7.1 billion to Victorian GVA. Therefore, tourism was worth \$14.1 billion to Victoria's economy in total GVA in 2021-22, noting an increase of 57.7% from 2020-21 estimates (but down 46.9% from 2018-19).
- In comparison, GVA in the whole of the Victorian economy grew 12.0% from 2018-19 to 2021-22. As a result, tourism's total share of the Victorian economy fell from 6.2% in 2018-19 to 2.0% in 2020-21, although recovered some share in 2021-22 to reach 2.9%.

Chart 3. Composition of total direct GVA in Victoria 2021-22

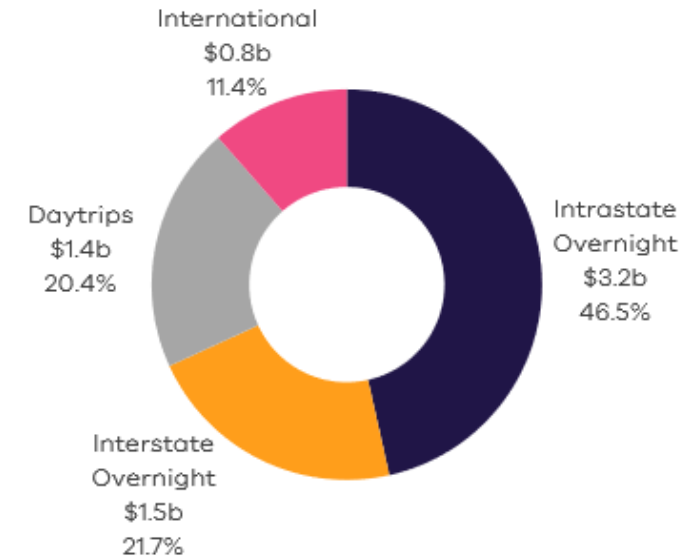
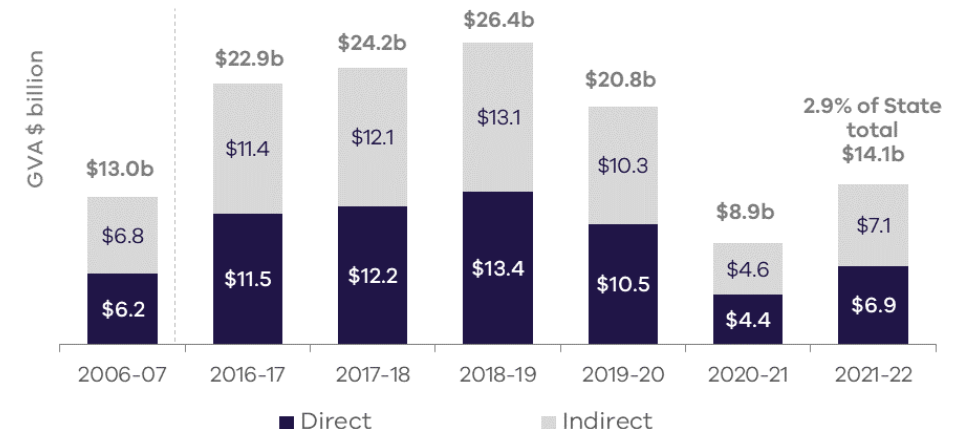


Chart 4. Tourism contribution to Victoria's Gross Value Added



Economic contribution of tourism to Victoria 2021-22

Tourism filled jobs

To note: Australian Bureau of Statistics (ABS) has adopted 'tourism filled jobs' rather than 'tourism employed persons' as the standard metric for reporting tourism employment. The 2021-22 STSA uses this metric for the first time which has resulted in a major revision to the time series (refer to [data notes](#) for further information).

Direct tourism filled jobs in Victoria increased in 2021-22 to reach 121,900, an increase of 43,700 jobs from 2020-21, although below the pre-COVID estimate.

- In 2021-22, tourism directly generated approximately 121,900 jobs in Victoria, up 55.9% from the 2020-21 estimate (but down 36.4% from 2018-19). This comprised 3.3% of filled jobs in the state, up from 2.2% in 2020-21 (but down 2.1% points from 2018-19).
- Looking at the distribution of tourism jobs across Victorian industries, cafés, restaurants and takeaway food services (40.8%) accounted for the largest share of direct tourism filled jobs, followed by retail trade (16.0%), accommodation (14.2%) and clubs, pubs, taverns and bars (8.7%).
- Direct filled jobs in the accommodation sector has noted a high rate of increase since 2020-21 (+73.0%), although remains down 28.2% compared to 2018-19 (pre-pandemic). Strong recovery was also noted in retail trade (+46.6%), although this category was 36.7% below 2018-19. High rates of year-on-year increases were also noted in clubs, pubs taverns and bars (+43.2%), as well as cafes, restaurants and takeaway food services (+42.8%), although both categories remained well below the pre-pandemic estimates (down 31.6% and 22.0% respectively). The 'other' category noted the largest rebound from 2020-21 (+93.8%) but was 57% below the 2018-19 estimate.
- The distribution of full-time vs part-time direct tourism filled jobs by industry is noted in table 4 ([page 13](#) of this report). Most part-time workers were noted in cafés, restaurants and takeaway food services (51.2%), followed by retail trade (14.2%) and accommodation (12.4%) industries.
- There was a higher share of full-time workers in most categories apart from cafés, restaurants and takeaway food services and clubs, pubs and taverns and other sports and recreations services, which had higher shares of part-time workers, reflecting the casualised nature of the work.

Chart 5. Composition of direct tourism filled jobs by industry

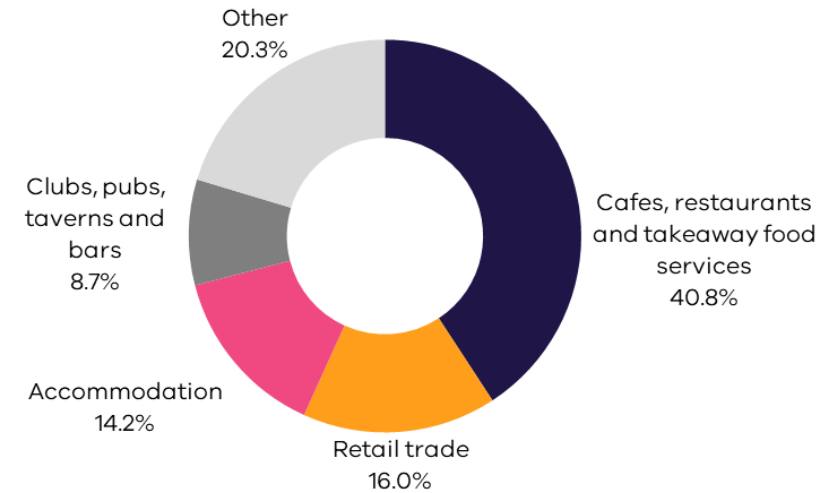
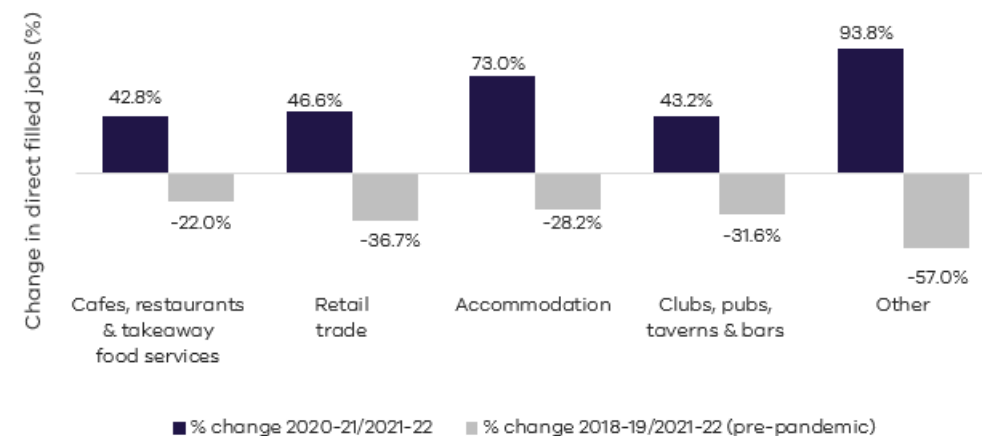


Chart 6. Change in direct filled jobs by industry 2020-21/2021-22 and 2018-19/2021-22



Economic contribution of tourism to Victoria 2021-22

Tourism filled jobs

To note: ABS has adopted 'tourism filled jobs' rather than 'tourism employed persons' as the standard metric for reporting tourism employment. The 2021-22 STSA uses this metric for the first time which has resulted in a major revision to the time series (refer to [data notes](#) for further information).

Tourism filled jobs in Victoria have lifted to 171,100 in 2021-22, up 61,700 jobs from 2020-21, but remain below the pre-pandemic estimate.

- As noted in chart 7 below, direct tourism filled jobs in Victoria had a slightly higher proportion of part-time jobs (54%) relative to full-time jobs (46%) in 2021-22.
- The indirect component of tourism filled jobs in Victoria noted an increase of 58.2% compared to 2020-21 to reach 49,200. This was 46.9% below the 2018-19 estimate. The indirect share of tourism filled jobs in Victoria increased from 0.9% in 2020-21 to 1.3% in 2021-22, which was down from 2.6% in 2018-19.
- In total, 171,100 tourism filled jobs were recorded in 2021-22, up 56.4% compared to 2020-21. However, this was well below the pre-pandemic result (-39.8% or down 113,300 jobs from 2018-19). In comparison, filled jobs in the Victorian economy overall grew moderately by 3.1% from 2018-19 to 2021-22, reinforcing the severity of the impacts of the pandemic on tourism jobs relative to other industries.
- As a result, tourism's share of overall filled jobs in Victoria fell from 8.0% in 2018-19 down to 3.1% in 2020-21 but has lifted to 4.7% in 2021-22.

Chart 7. Full-time vs part-time direct tourism filled jobs in Victoria

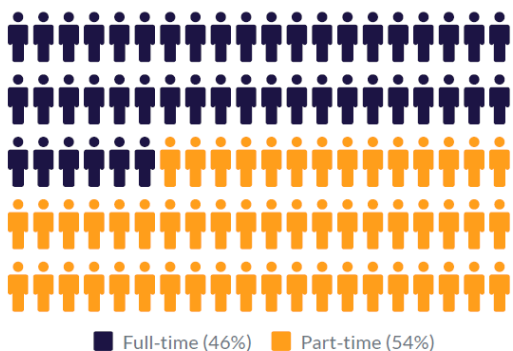


Chart 8. Tourism's % contribution to filled jobs in Victoria

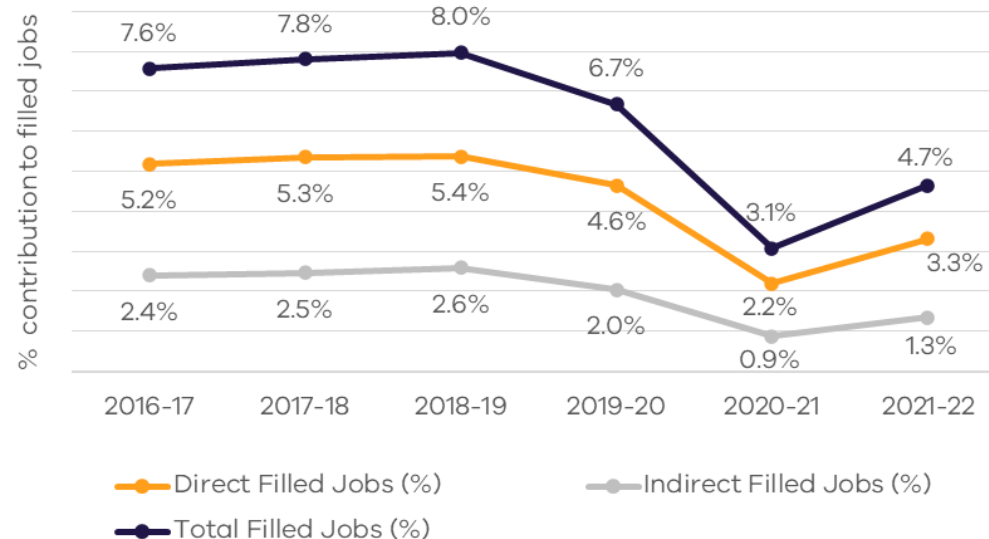
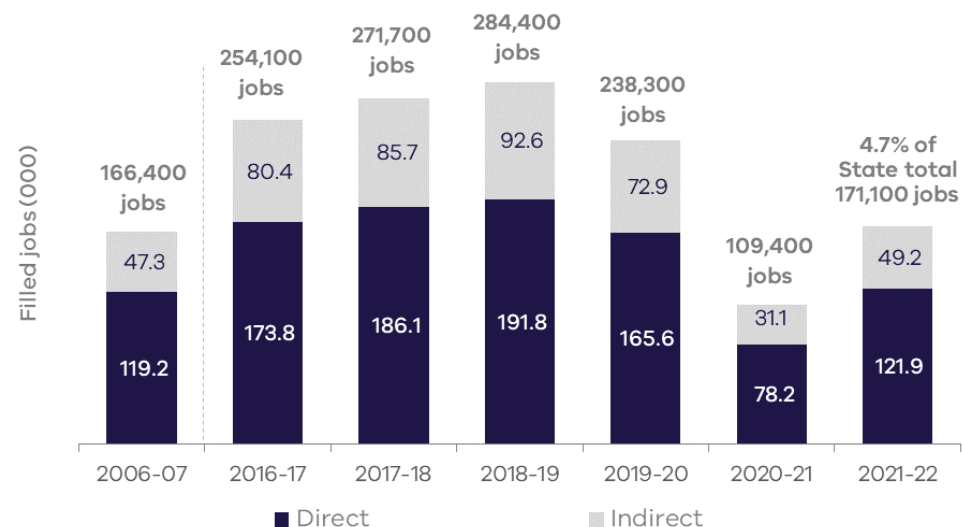


Chart 9. Tourism's contribution to filled jobs in Victoria



Economic contribution of tourism to Victoria 2021-22

Industry Comparison

- Tourism's share of direct GVA for the state (1.4%) was below other industries in 2021-22, with the highest contribution delivered by financial and insurance services (9.9%), health care and social assistance (9.4%), professional, scientific and technical services (9.3%) and construction (8.5%).
- Tourism's share of direct GVA noted the largest decline of all key industries compared to pre-pandemic down 1.7% points from 2018-19 to 1.4% in 2021-22 (refer to chart 10).
- Tourism's share of direct filled jobs for the state (3.3%), declined by 2.1% points compared to the pre-pandemic 2018-19 estimate. Direct tourism filled jobs made a higher contribution to jobs than agriculture, forestry and fishing (2.4%) and mining (0.2%) in 2021-22.
- Growth in share of filled jobs in 2021-22 compared to 2018-19 was noted in the health care and social assistance sector (+1.1%), reflecting the increased demands on this sector (refer chart 11).

Tourism Consumption

- In 2021-22 total tourism consumption in Victoria increased by 53.2% from 2020-21 to \$20.4 billion. However, this was 43.6% below 2018-19 estimates (down \$15.8 billion) in line with the downturn in tourism demand due to COVID. This was larger than the rate of decline in consumption nationally relative to 2018-19 (down 36.5%) and Queensland (-22.9% to \$26.7 billion), but lower than the decline noted in New South Wales (-46.1% to \$25.1 billion).
- Approximately three-quarters (75%) of Australia's total tourism consumption was concentrated in New South Wales, Victoria and Queensland in 2021-22, compared to 77% in 2018-19.
- The decline in consumption in Victoria was driven by the lack of international travel for most of the period, with the category comprising 9.2 per of consumption in 2021-22 compared to 29.9% in 2018-19. In 2021-22 tourism consumption in Victoria was concentrated in the intrastate (43.7%) and daytrip (27.0%) segments.

Chart 10. % Contribution to GVA in Victoria by industry

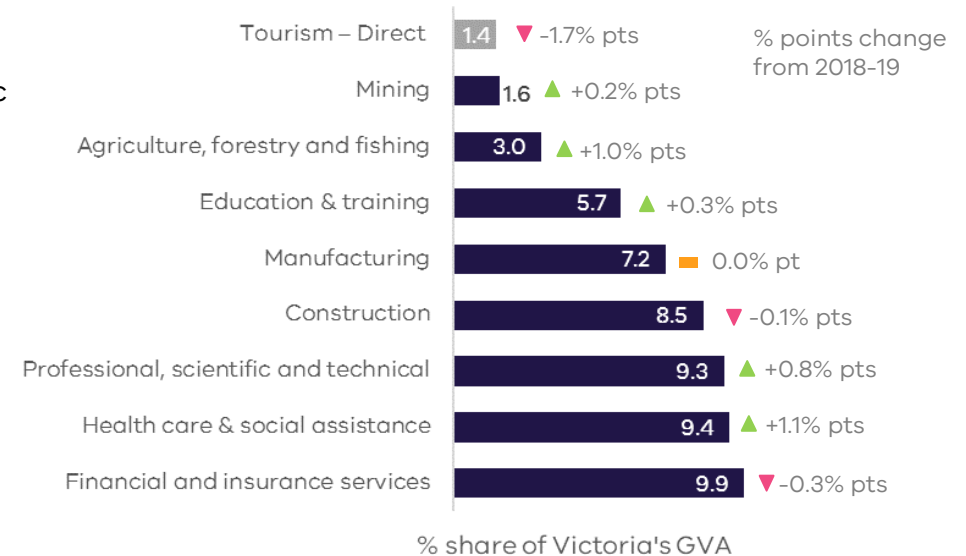
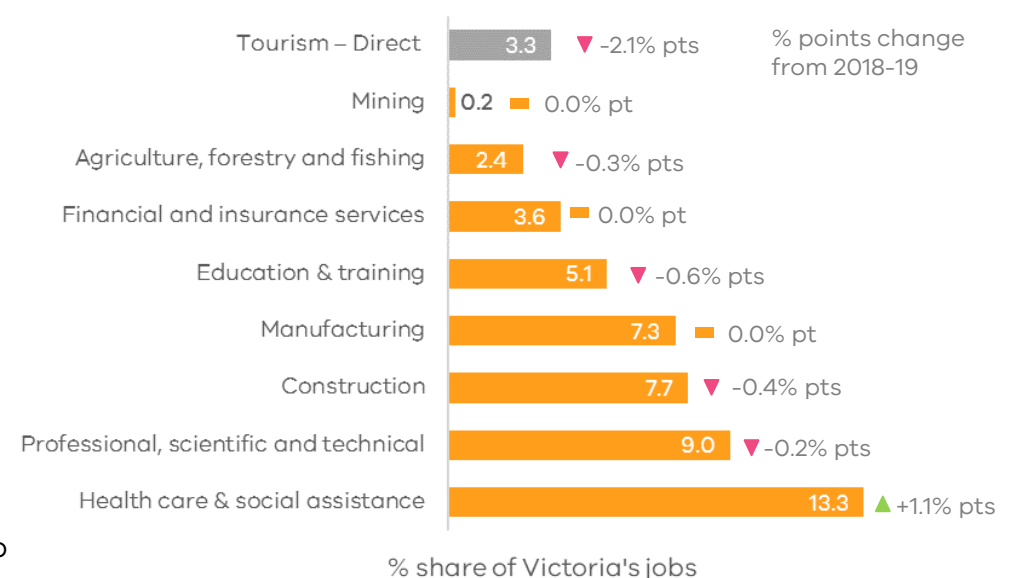


Chart 11. % Contribution to filled jobs in Victoria by industry



Economic contribution of tourism to Victoria 2021-22

State / Territory Comparisons

Victoria's tourism sector has noted the largest rate of growth in GSP and jobs in 2021-22 compared to 2020-21, reflecting the strong recovery underway.

- Tourism generated \$77.0 billion in Gross Domestic Product for Australia in 2021-22, which was \$47.2 billion below the pre-pandemic estimate in 2018-19 (or -38.0%).
- The jurisdictions that contributed the most to tourism GDP in Australia in 2021-22 were Queensland at \$21.5 billion, New South Wales at \$20.1 billion followed by Victoria at \$16.0 billion.
- Victoria recorded the highest rate of growth in 2021-22 compared to 2020-21 (+57.8%), reflecting its recovery from the losses suffered during the pandemic. Victoria's growth in GSP was well above the national rate (+25.2%), as well New South Wales which had a more moderate recovery (+2.8%).
- New South Wales suffered the largest net loss in total tourism GSP in 2021-22 compared to 2018-19 (down \$18.1 billion or -47.4%), followed by Victoria down \$13.4 billion (-45.7%) and Queensland down \$6.6 billion (-23.6%).
- Nationally, tourism's total contribution (direct and indirect) to tourism filled jobs was 753,000, suffering a loss of 357,300 jobs compared to the pre-pandemic 2018-19 estimate (or -32.2%).
- The jurisdictions that contributed the most to total national tourism filled jobs in 2021-22 were Queensland at 206,200, New South Wales at 174,500 and Victoria at 171,100.
- Total tourism filled jobs suffered the largest loss in New South Wales in 2021-22 compared to 2018-19 (down 143,000 jobs or -45.0%), greater than the loss in Victoria (down 113,300 jobs or -39.8%) and Queensland (down 40,900 jobs or -16.6%).

Chart 12. State comparison of tourism's contribution to GSP 2021-22

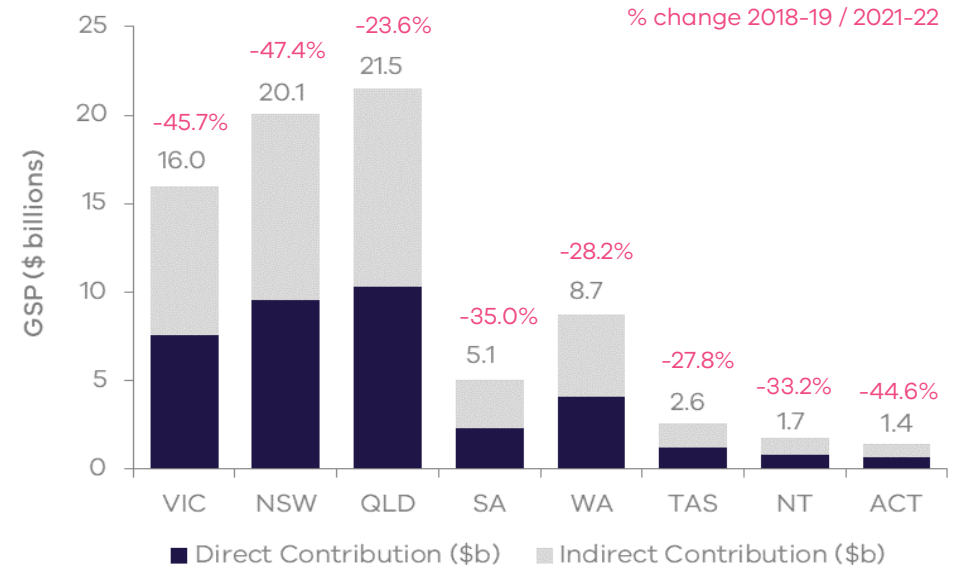
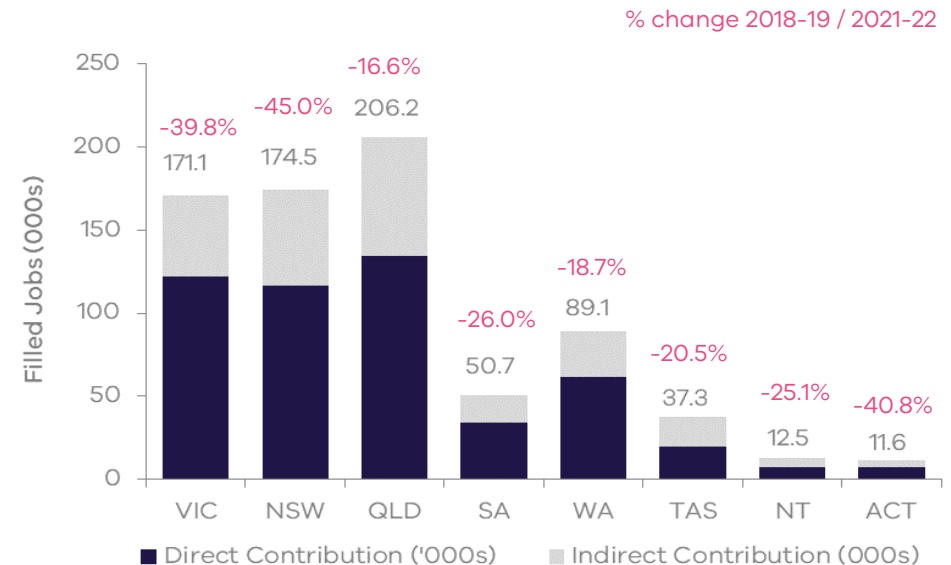


Chart 13. State comparison of tourism filled jobs 2021-22



Economic contribution of tourism to Victoria 2021-22

State / Territory Comparisons

The contribution of tourism GSP and filled jobs in Victoria to the overall economy has recovered slightly from the previous financial year, however remains below pre-pandemic levels.

Gross State Product (GSP)

- Chart 13 shows that tourism in Tasmania made the greatest contribution to its state's GSP at 6.7% in 2021-22, reflecting its high reliance on the sector. This was followed by the Northern Territory (5.6%), Queensland (4.8%) and South Australia (3.9%), with New South Wales at 2.9%.
- Victoria's tourism industry contributed 3.1% to the state's economy in GSP, which represents an increase of 1.0% point compared to 2020-21 but was 3.3% points below 2018-19 estimates.
- Tourism's share of GSP in Victoria was marginally below the national average (3.3%). Western Australia's tourism industry made the lowest contribution to GSP in 2021-22 at 2.2%.

Tourism Filled Jobs

- Tasmania's high reliance on the tourism industry is also reflected in tourism filled jobs estimates, with the industry contributing 12.2% to overall filled jobs in the state in 2021-22.
- The Northern Territory's tourism industry also comprised a high proportion of overall filled jobs (8.5%), followed by Queensland (6.7%) and Western Australia (5.6%), with New South Wales at 3.8%.
- Victoria's tourism industry contributed 4.7% to overall filled jobs in 2021-22, below the national average rate (5.2%). This has increased by 1.6% points from 2020-21, however was 3.3% points below 2018-19.

Chart 13. Contribution of total GSP to each jurisdiction

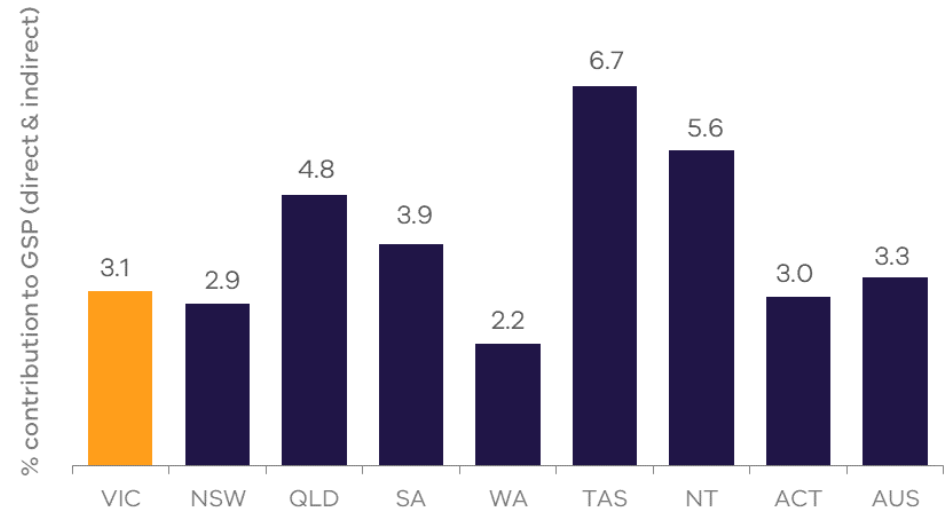
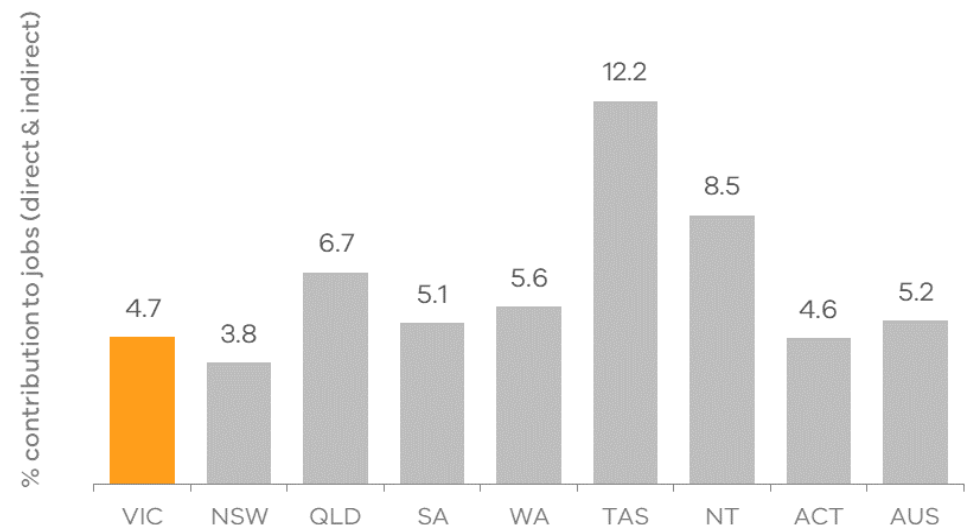


Chart 14. Contribution of filled jobs to each jurisdiction



Economic contribution of tourism to Victoria 2021-22

Table 1: Tourism's contribution in Victoria to GVA, GSP and Filled Jobs 2016-17 to 2021-22

Tourism Economic Contribution	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	AAG (2017-22) (% p.a.)	YOY change (2021-22) (%)	3 year change (2019-22) (%)
Gross Value Added (GVA)									
Direct GVA (\$m)	11,506	12,153	13,388	10,541	4,350	6,911	-9.7% p.a.	58.9%	-48.4%
Indirect GVA (\$m)	11,382	12,077	13,050	10,275	4,561	7,140	-8.9% p.a.	56.6%	-45.3%
Total GVA (\$m)	22,888	24,230	26,438	20,817	8,911	14,051	-9.3% p.a.	57.7%	-46.9%
Direct GVA (%)	3.0%	3.0%	3.1%	2.4%	1.0%	1.4%	-1.5%pt	0.5%pt	-1.7%pt
Indirect GVA (%)	3.0%	3.0%	3.1%	2.4%	1.0%	1.5%	-1.5%pt	0.5%pt	-1.6%pt
Total GVA (%)	5.9%	6.0%	6.2%	4.8%	2.0%	2.9%	-3.0%pt	0.9%pt	-3.3%pt
Gross State Product (GSP)									
Direct GSP (\$m)	12,535	13,248	14,589	11,372	4,676	7,557	-9.6% p.a.	61.6%	-48.2%
Indirect GSP (\$m)	12,959	13,811	14,811	11,698	5,443	8,408	-8.3% p.a.	54.5%	-43.2%
Total GSP (\$m)	25,494	27,059	29,400	23,070	10,119	15,964	-8.9% p.a.	57.8%	-45.7%
Direct GSP (%)	3.0%	3.0%	3.2%	2.4%	1.0%	1.5%	-1.5%pt	0.5%pt	-1.7%pt
Indirect GSP (%)	3.1%	3.1%	3.2%	2.5%	1.1%	1.6%	-1.5%pt	0.5%pt	-1.6%pt
Total GSP (%)	6.1%	6.1%	6.4%	4.9%	2.1%	3.1%	-3.0%pt	1.0%pt	-3.3%pt
Filled Jobs									
Direct Filled Jobs (000s)	173.8	186.1	191.8	165.6	78.2	121.9	-6.8% p.a.	55.9%	-36.4%
Indirect Filled Jobs (000s)	80.4	85.7	92.6	72.9	31.1	49.2	-9.4% p.a.	58.2%	-46.9%
Total Filled Jobs (000s)	254.1	271.7	284.4	238.3	109.4	171.1	-7.6% p.a.	56.4%	-39.8%
Direct Filled Jobs (%)	5.2%	5.3%	5.4%	4.6%	2.2%	3.3%	-1.9%pt	1.1%pt	-2.1%pt
Indirect Filled Jobs (%)	2.4%	2.5%	2.6%	2.0%	0.9%	1.3%	-1.1%pt	0.5%pt	-1.3%pt
Total Filled Jobs (%)	7.6%	7.8%	8.0%	6.7%	3.1%	4.7%	-2.9%pt	1.6%pt	-3.3%pt

Note: Figures may not add up due to rounding. Please do not compare with previously published estimates due to revisions to input data.

This release contains major revisions to the employment time-series due to the adoption of 'filled jobs' from the Labour Account from 'employed persons' based on the Labour Force survey which was used in previous releases. Data has been back-cast to measure like-for-like growth changes.

Source: State Tourism Satellite Accounts 2021-22, produced by Tourism Research Australia, May 2023.

Research report produced by the Tourism and Events Research Unit, May 2023.

Economic contribution of tourism to Victoria 2021-22

Table 2: State summary of tourism's contribution to GSP, GVA and filled jobs

2021-22	Gross State Product			Gross Value Added			Filled Jobs		
	Total (\$m)	% change 2020-21 to 2021-22	% change 2018-19 to 2021-22	Total (\$m)	% change 2020-21 to 2021-22	% change 2018-19 to 2021-22	Total ('000)	% change 2020-21 to 2021-22	% change 2018-19 to 2021-22
Australia	77,005	25.2%	-38.0%	67,475	25.3%	-38.8%	753.0	21.5%	-32.2%
Victoria	15,964	57.8%	-45.7%	14,051	57.7%	-46.9%	171.1	56.4%	-39.8%
New South Wales	20,055	2.8%	-47.4%	17,575	3.1%	-47.9%	174.5	-2.4%	-45.0%
Queensland	21,501	37.1%	-23.6%	18,953	37.4%	-24.5%	206.2	32.4%	-16.6%
South Australia	5,061	4.1%	-35.0%	4,253	3.5%	-34.5%	50.7	-0.8%	-26.0%
Western Australia	8,715	28.5%	-28.2%	7,664	28.2%	-29.4%	89.1	23.1%	-18.7%
Tasmania	2,589	21.2%	-27.8%	2,296	20.4%	-28.5%	37.3	16.6%	-20.5%
Northern Territory	1,733	35.1%	-33.2%	1,467	34.9%	-31.8%	12.5	27.6%	-25.1%
ACT	1,387	20.5%	-44.6%	1,215	21.4%	-45.2%	11.6	10.5%	-40.8%

Table 3: Industry share of direct GVA and filled jobs

Share of State Total by Industry	GVA (%)					Filled Jobs (%)				
	2018-19	2020-21	2021-22	% change 2020-21 to 2021-22	% change 2018-19 to 2021-22	2018-19	2020-21	2021-22	% change 2020-21 to 2021-22	% change 2018-19 to 2021-22
Financial and insurance services	10.2	10.2	9.9	-0.3% pts	-0.3% pts	3.6	3.8	3.6	-0.2% pts	0.0% pts
Health care & social assistance	8.3	9.1	9.4	0.4% pts	1.1% pts	12.2	13.5	13.3	-0.1% pts	1.1% pts
Professional, scientific and technical services	8.5	9.1	9.3	0.2% pts	0.8% pts	9.2	9.1	9.0	-0.1% pts	-0.2% pts
Construction	8.6	8.4	8.5	0.2% pts	-0.1% pts	8.1	7.6	7.7	0.1% pts	-0.4% pts
Manufacturing	7.2	7.2	7.2	0.1% pts	0.0% pts	7.2	7.1	7.3	0.2% pts	0.0% pts
Education & training	5.5	5.9	5.7	-0.1% pts	0.3% pts	5.7	5.3	5.1	-0.2% pts	-0.6% pts
Agriculture, forestry and fishing	2.0	2.3	3.0	0.7% pts	1.0% pts	2.7	2.5	2.4	-0.1% pts	-0.3% pts
Mining	1.4	1.0	1.6	0.6% pts	0.2% pts	0.3	0.3	0.2	0.0% pts	0.0% pts
Tourism – Direct	3.1	1.0	1.4	0.5% pts	-1.7% pts	5.4	2.2	3.3	1.1% pts	-2.1% pts
Tourism – Total (direct & indirect)	6.2	2.0	2.9	0.9% pts	-3.3% pts	8.0	3.1	4.7	1.6% pts	-3.3% pts

Note: Figures may not add up due to rounding. Please do not compare with previously published estimates due to revisions to input data.

This release contains major revisions to the employment time-series due to the adoption of 'filled jobs' from the Labour Account from 'employed persons' based on the Labour Force survey which was used in previous releases. Data has been back-cast to measure like-for-like growth changes.

Source: State Tourism Satellite Accounts 2021-22, produced by Tourism Research Australia, May 2023.

Research report produced by the Tourism and Events Research Unit, May 2023.

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Table 4: Direct tourism filled jobs - full-time vs part-time jobs by industry

Industry	Full-Time (‘000)	Part-Time (‘000)	Total* (‘000)	Share Full-time (%)	Share Part-time (%)
Cafes, restaurants and takeaway food services	16.1	33.7	49.7	28.6%	51.2%
Retail trade	10.2	9.3	19.5	18.2%	14.2%
Accommodation	9.1	8.2	17.3	16.3%	12.4%
Clubs, pubs, taverns and bars	4.4	6.1	10.6	7.8%	9.3%
Air, water and other transport	4.5	1.4	5.8	8.0%	2.2%
Other sports and recreation services	2.7	3.1	5.8	4.8%	4.7%
Travel agency and tour operator services	3.5	1.2	4.8	6.3%	1.9%
Education and training	2.0	1.2	3.3	3.6%	1.9%
Cultural services	1.0	0.7	1.7	1.8%	1.0%
Road transport and transport equipment rental	0.5	0.2	0.7	0.9%	0.2%
Casinos and other gambling services	0.3	0.1	0.4	0.5%	0.2%
Rail transport	0.2	0.0	0.2	0.3%	0.0%
All other industries	1.6	0.6	2.1	2.8%	0.8%
Direct tourism employment	56.1	65.8	121.9	100.0%	100.0%

*Note full-time and part-time tourism jobs within industries do not equate to the total due to the calculation method.

Note: Figures may not add up due to rounding. Please do not compare with previously published estimates due to revisions to input data.

This release contains major revisions to the employment time-series due to the adoption of 'filled jobs' from the Labour Account from 'employed persons' based on the Labour Force survey which was used in previous releases. Data has been back-cast to measure like-for-like growth changes.

Source: State Tourism Satellite Accounts 2021-22, produced by Tourism Research Australia, May 2023.

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Background

Travellers participate in many different activities during their trip, from shopping, eating out and visiting attractions to using transport and staying in accommodation. As a result, the impacts of tourism occur across many industries and can't be measured in the same way as other parts of the economy.

As such, the Australian Bureau of Statistics (ABS) produce Tourism Satellite Accounts (TSA). The TSA, part of the Australian National Accounts, estimate the impact of tourism on the Australian economy. They use an internationally accepted methodology developed by the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO).

The TSA includes measures of the economic contribution of tourism to Gross Value Added (GVA), Gross Domestic Product (GDP)/Gross State Product (GSP) and filled jobs. It also provides information about tourism consumption, output, taxation, and the composition of the tourism industry and its interaction with other industries.

As an economic modelling exercise, the TSA estimates generated are subject to the quality of data inputs and underlying assumptions.

The 2021-22 State TSA report follows the release of the National TSA for 2021-22 by the ABS and includes back-cast data to 2006-07.

Changes to this Issue – data notes

The ABS “National TSA 2021-22” released in December 2022, included a change in their metric used for reporting employment. The ABS, for the first time, reported tourism filled jobs (sourced from the Labour Account) instead of tourism employment (sourced from the Labour Force Survey). The ABS applied this change because tourism filled jobs provide a more meaningful measure of the tourism workforce. Importantly, tourism filled jobs captures the many secondary jobs that people have in the tourism sector and the highly casualised nature of work within the industry. For more details on changes please visit [TSA data](#).

In keeping with best practice, TRA has followed the lead of the ABS, by reporting tourism filled jobs for the first time in the 2021-22 issue of the State TSA. This has seen the complete time series (2006-07 to 2021-22) revised from previous issues to report tourism filled jobs for all states and territories.

A comparison of tourism filled jobs (used in the latest State TSA 2021-22) and employed persons (used in the State TSA 2020-21 published May 2022) shows that direct tourism employment estimates between 2006-07 and 2018-19 (pre-pandemic years) have been revised upward for each state and territory and nationally in the range of 3% (lowest) in 2007-08 and 10% (highest) in 2012-13. Notably, direct tourism ‘filled jobs’ estimates for Victoria in 2018-19 (pre-pandemic) in this release were 5% above the previously published ‘persons employed’.

The revisions for 2019-20 and 2020-21 were impacted by factors related to the COVID-19 pandemic. Prior to the 2021-22 National TSA release, the ABS updated the ratios they apply for estimating tourism filled jobs to account for the latest information available. Due to the rapid changes brought about by COVID, this saw significant downward adjustment to their estimates of tourism filled jobs over the pandemic period. These revisions have led to lower estimates than reported using the employed persons measure previously for the pandemic years of 2019-20 and 2020-21 (-3% in 2019-20 and -29% in 2020-21 for direct tourism filled jobs estimates for Victoria).

Revisions to the Australian Bureau of Statistics’ (ABS) national accounts data have also affected the State TSA. These data are revised annually by the ABS to reflect changes in the economy, in line with international best practice. ABS has embarked upon updating input-output relationships. This is based on the latest available supply-use tables which in this case refers to year 2019-20.

In this edition of the State TSA therefore, the input-output tables (I-O tables) used in generating indirect contribution of tourism resulting from Output and jobs multipliers, have also been revised using 2019-20 I-O tables. This has resulted in a revision of results for the whole time-series, meaning data from previous editions is not directly comparable to this STSA.

Regional expenditure data revisions also have affected this STSA. These data are sourced from the International Visitor Survey (IVS) and National Visitor Survey (NVS), year ending June 2022.

As such, the State TSA estimates in this publication are not comparable to the previously published State TSA estimates. The most recent results should only be compared to the revised time series to ensure like-for-like comparisons.

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Definitions and Notes

Tourism Satellite Account: Tourism Satellite Accounts (TSA) are used to supplement the System of National Accounts by measuring the economic contribution of tourism. The TSA estimates the worth of the tourism sector by combining the contributions of various goods and services across the economy. This then makes it possible to compare the economic contribution of the tourism industry, and its individual sectors to conventional industries.

Concept of Tourism: Tourism is defined differently to other standard industries, such as manufacturing or transport, as it is defined by the nature of the consumer, as a tourist (demand side), rather than the process by which goods or services are produced (supply side). Tourism is a component of many other standard industries, as tourists create demand in range industries including accommodation, cafes, restaurants, retail trade and transport.

A tourist or visitor is defined as any person travelling for business, leisure or other reason for less than 12 months duration, but not people travelling as part of a permanent migration or regular commuting. In Australia, using ABS and Tourism Research Australia definitions, a domestic visitor is a person travelling at least 40 km each way overnight or at least 25 km each way on a day trip.

Tourism consumption represents the demand side of tourism. It is the total value of goods and services consumed by domestic, inbound and outbound visitors. It consists of tourism expenditure plus imputed consumption on tourism related products. It is measured as the price the visitor pays including all taxes, subsidies and sales margins (i.e., purchasers' prices).

Tourism gross value added (GVA): Considered the most accurate measure of the contribution of the industry to the economy. It includes the total labour income and capital revenue received by the industry and the net taxes that government receives from the production and is measured in basic prices. GVA is often considered the most accurate way of measuring the contribution of an industry to the economy and is best used when comparing the direct contribution of the tourism industry against conventional industries (such as mining or manufacturing) or across countries and regions. Direct and indirect flow-on GVA are measured separately. Combined they provide an estimate of total tourism GVA.

Tourism gross state product (GSP): The equivalent of Gross Domestic Product (GDP) at a State level. GSP refers to tourism GVA plus net taxes on products that are attributable to the tourism industry. Generally, GSP has a higher value than tourism GVA. Direct and indirect flow-on GSP are measured separately. Combined they provide an estimate of total tourism GSP.

State TSA goes beyond the scope of the national TSA by providing both the direct and indirect impacts of tourism and are measured separately using the TSA framework and Input Output (IO) modelling techniques, respectively. Combined they provide an estimate of total tourism GSP.

The direct contribution of tourism measures the contribution of direct transactions between a visitor and producer of a good or service that involves a direct physical or economic relationship. Put simply, this would include the direct impact of a visitor staying at hotel or participating in a tour. Direct economic impacts are measured according to the TSA framework.

The indirect contribution of tourism captures the flow-on or 'second round' impacts created by the tourism industry. These result from the need for inputs to be supplied to the industries that directly provide goods and services to visitors. For example, this might include the fresh produce supplied to a hotel to deliver meals to guests. The inclusion of indirect contributions is not valid when comparing tourism against other industries (as it would involve extensive double counting), however it is useful when considering tourism in isolation and the flow-on effect and impact it has on the total economy.

Filled jobs (employment metric used in current release): Filled jobs refer to all positions of employment that are currently filled (including self-employment). Filled jobs can be measured from either household sources (such as the Labour Force Survey), or business sources (such as the Economic Activity Survey).

Employed person (employment metric used in previous releases): Is a person aged 15 years and over who worked for one hour or more per week for pay, profit, commission or payment in kind in a job or business, or on a farm; or worked for one hour or more without pay in a family business or on a farm.



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Data limitations

Quality of Estimates: It is important to note that the estimates of economic contribution are derived from estimates and assumptions of complex interactions amongst all components of the economy which change over time. While as much care as possible has been taken to ensure the quality of the estimates in the satellite accounts, users should exercise some caution in the use and interpretation of the results. In order to produce estimates at a finer level of detail than is normally provided in the national accounts, some of the data used to produce the satellite accounts have been extended to the limits of their designed capabilities. Assumptions underlying the estimates also influence the estimates' quality.

More Information

For more detail on the methodology and results please refer to the full report: State Tourism Satellite Accounts 2021-22:

<https://www.tra.gov.au/Economic-analysis/economic-value>

For more detail on the National Tourism Satellite Accounts 2021-22, refer to:

<https://www.abs.gov.au/ausstats/abs@.nsf/mf/5249.0>

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Victorian Government

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Further information can be found at [Tourism Research Australia](#)

Data is considered correct at the time of publishing.

Due care is taken in the production of this report, however DJSIR accepts no responsibility for use of this information.

Please contact: research@ecodev.vic.gov.au with any queries.

