

State Tourism Satellite Account 2020-21

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Summary of outcomes

The severe impacts of the COVID pandemic can be clearly seen in the results of the 2020-21 State Tourism Satellite Account. While the previous period of 2019-20 had some employment inflation due to the Job Keeper initiative, the current 2020-21 results show the full impacts of the COVID pandemic on the South Australian visitor economy.

In 2020-21 there were 37,300 direct tourism jobs in South Australia. This was a decrease of 2,600 jobs compared to the previous period and a total decrease of 3,600 jobs since the pre-COVID period. In 2020-21 there were an additional 19,200 people indirectly employed in tourism.

Tourism contributed \$2.6 billion to Gross State Product in 2020-21. This was an 18.3 per cent decrease compared to 2019-20 and a 27.7 per cent decrease compared to the pre-COVID measure.

In 2020-21 tourism directly contributed \$2.3 billion in Gross Value Added (GVA) and an additional \$2.1 billion in indirect GVA. Direct GVA decreased 19.8 per cent from 2019-20 and 28.8 per cent compared to the pre-COVID period.

South Australia	2020-21 Result	Change from 2019-20	Change from pre-COVID (2018-19)
Tourism GSP (\$B)			
Direct	2.6	-18.3%	-27.7%
Indirect	2.7	-21.2%	-36.1%
Total tourism GSP	5.2	-19.8%	-32.3%
Total state GSP	118	6.4%	7.4%
<i>Tourism's direct share of total state GDP (%)</i>	2.2%	-0.6%	-1.0%
Tourism GVA (\$B)			
Direct	2.3	-19.8%	-28.8%
Indirect	2.1	-19.1%	-34.0%
Total tourism GVA	4.4	-19.5%	-31.5%
Total state GVA	109	5.8%	6.9%
<i>Tourism's direct share of total state GVA (%)</i>	2.1%	-0.7%	-1.1%
Tourism Employment (000s)			
Direct	37.3	-6.5%	-8.8%
Indirect	19.2	8.7%	-10.1%
Total tourism employment	56.5	-4.2%	-9.3%
Total state employment	855	1.4%	0.8%
<i>Tourism's direct total state employment share (%)</i>	4.4%	-0.3%	-0.4%

The Tourism Satellite Account for South Australia includes an estimate of 'tourism consumption', which is different from the estimates of expenditure published by the SATC and included in the 2030 South Australian Visitor Economy Sector Plan. Tourism consumption includes other expenditure data, such as outbound (Australian residents spending before and after they return from an overseas holiday) and actual and imputed rent on holiday houses. The South Australian Tourism Commission will continue to focus on using total tourism expenditure (\$8 billion by 2020 and \$12.8 by 2030) as a basis for future planning.

Background

The Australian Bureau of Statistics has been producing the Australian Tourism Satellite Account since 2000. The State Tourism Satellite provides information about the economic value of the tourism industry at a national level.

The tourism industry is an important contributor to the Australian economy, however, up until this time, the System of National Accounts did not capture tourism as a single industry because of tourism's diverse range of products and services. Consequently, Tourism Satellite Accounts are used to supplement the System of National Accounts by consolidating these different sources into a single 'satellite' industry of 'tourism'. The Tourism Satellite Accounts have been recognised internationally as the best method for measuring the direct contribution of tourism to the economy on a comparable basis with other 'traditional' industries.

Tourism Research Australia use the National Tourism Satellite as the basis of modelling the State Tourism Satellite Accounts which provide an insight to the economic value of the tourism industry in each Australian state and territory.

This fact sheet summarises the outcomes of the 2019-20 State Tourism Satellite Accounts for South Australia released on the 22 March 2021. This can be found at: <https://tourism.sa.gov.au/insights/south-australian-visitor-economy>

Data Revisions

A recurring feature of the State Tourism Satellite Accounts is that historical estimates for previous years are revised. Revisions to these estimates are not caused by changes to the State Tourism Satellite Accounts model but are caused by changes in the underlying data that feed into the State Tourism Satellite Accounts model. This comprises changes to regional expenditure data by Tourism Research Australia which effects consumption data and Australian Bureau of Statistics National Accounts data which affect consumption and GVA for the entire economy and the tourism sector and are done annually. Additionally, every three years the ABS benchmark the data to ensure accurate evolution of the definition of tourism and how various industries contribute to the Satellite Account. More information is available at: <https://www.tra.gov.au/research/view-all-publications/all-publications/economic-reports>.

Explanation of Selected Terms

Direct Economic Contribution

Money spent directly in the tourism industry – without a tourism industry in South Australia this money wouldn't be generated, or these jobs wouldn't exist.

Indirect Economic Contribution

The flow-on effect of the tourism industry. In South Australia, for every dollar spent in the tourism industry, an additional 81 cents were spent elsewhere in the economy.

Tourism Consumption

The total value of tourism goods and services consumed by residents and visitors from overseas in Australia. It includes household, business and government tourism consumption. It represents the price paid by the visitor (which therefore includes taxes and subsidies) and is measured in purchasers' prices.

Tourism Expenditure

Tourism expenditure relates to actual expenditure made by, and on behalf of, travellers during a trip. It includes airfares and other transport costs such as bus and train fares and amounts spent on trip-related items before and after the trip. It does not include imputed expenditures or spending by outbound travellers and is therefore distinct from tourism consumption. The South Australian Tourism Commission goals are based on tourism expenditure not consumption.

Tourism Output

The total value of goods and services produced in Australia to satisfy visitor consumption. It is measured in basic prices, so it excludes net taxes on tourism products. Direct and indirect flow-on outputs are measured separately using the Tourism Satellite Account framework and I-O modelling techniques, respectively. Combined, they provide an estimate of total tourism output.

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. Direct and indirect flow-on Gross Value Add are measured separately using the Tourism Satellite Account framework and I-O modelling techniques, respectively. Combined, they provide an estimate of total tourism Gross Value Add.

Tourism Gross State Product (GSP)

Tourism GVA plus net taxes on products that are attributable to the tourism industry. As such, it generally has a higher value than tourism Gross Value Add. Direct and indirect flow on Gross State Product are measured separately using the Tourism Satellite Account framework and I-O modelling techniques, respectively. Combined, they provide an estimate of total tourism Gross State Product.