STATE TOURISM SATELLITE ACCOUNTS 2024-25 SUMMARY

Background

A National Account is the mechanism by which impact on the economy of a specific industry is measured. Tourism is not a distinct industry such as mining but rather draws on many different industries such as transport, retail and hospitality. Therefore, tourism is a "satellite" account sitting alongside the National Accounts. Measurement of the "tourism industry" draws on multiple National Accounts and data from visitor surveys.

The Tourism Satellite Account provides measures of Tourism Gross State Product (GSP), Tourism Gross Value Added (GVA), Tourism Output, Tourism Consumption and Tourism Employment. This paper focuses on three measures: employment, GVA and Tourism Output. While the measures of GSP and Consumption are also useful, it is important to note that the headline targets for the *South Australia Tourism Plan 2030* are consistently reported in terms of the total visitor expenditure as reported directly from the visitor surveys, which is the most straightforward measure and is currently $11.5 billion in the year to March 2026.

The Tourism Satellite Account is calculated at cascading levels. The National Tourism Satellite Account is created by the Australian Bureau of Statistics and provides a nation-wide view of the value of the "tourism industry" and was released in December 2025. This information is used by Tourism Research Australia (TRA) to develop the State Tourism Satellite Account which provides the value of the "tourism industry" in each State and Territory. The State Tourism Satellite Account cascades down to the Regional Tourism Satellite Account providing figures for individual regions and "Regional SA" overall. These regional figures will also be released in July 2026.

This paper relates to the release of the State Tourism Satellite Account for 2024-25. For ease of interpretation, results have been compared to both the previous financial year (2023-24) and to the pre-COVID year of 2018-19. Following strong growth during the post-pandemic recovery in 2022-23, conditions stabilised across 2023-24 and 2024-25. Consistent with this trend, the latest State Tourism Satellite Account results show modest growth in tourism employment and key economic indicators.

Because the Tourism Satellite Account is based on modelling and on data drawn from multiple sources, there are regular revisions to the figures as these data inputs are revised. It should be noted that these data revisions have impacted the published results for previous years in the 2024-25 release.

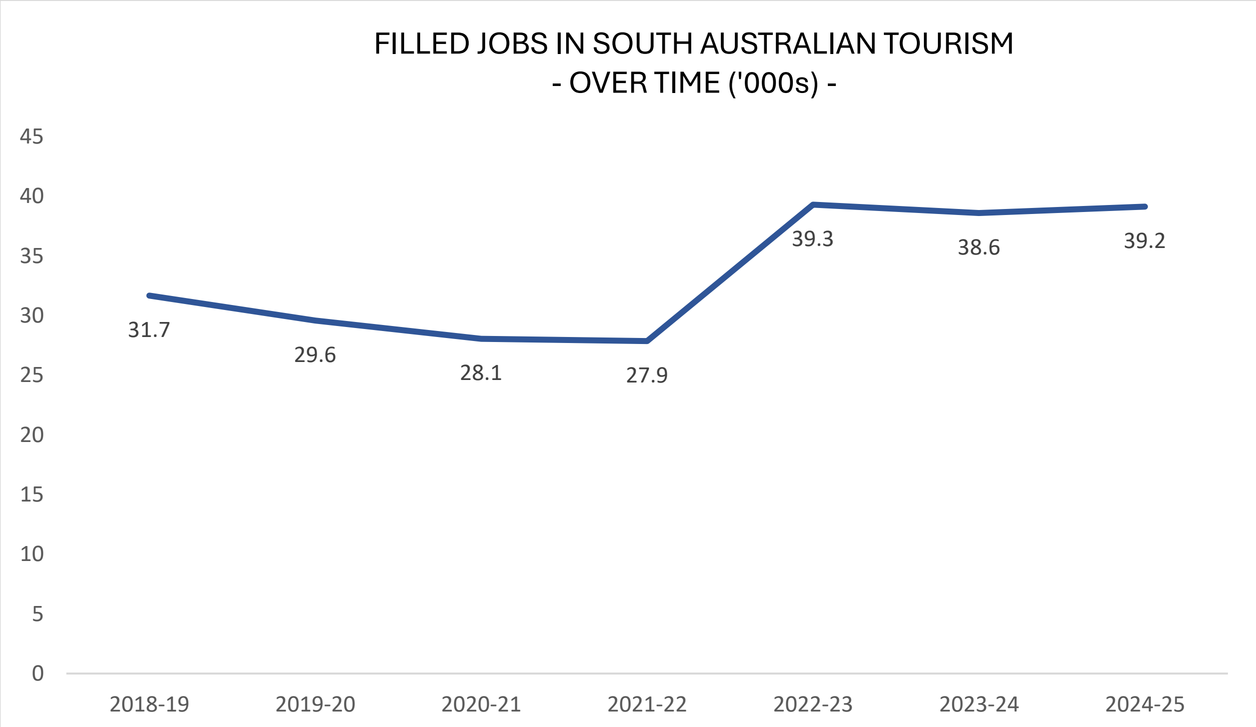
ISSUES/DISCUSSION

Tourism Employment

Employment in South Australia's tourism industry grew by 1.4% to 39,200 people in 2024-25. This follows a modest decline of 1.8% in 2023–24 and suggests the visitor economy has stabilised following the strong post-pandemic rebound experienced in 2022–23. Despite more moderate growth in the latest year, tourism employment in South Australia remains 23.6% above pre-COVID levels (2018–19), highlighting the sector's strong long-term recovery.

The growth in tourism employment outpaced the decline in tourism expenditure, which fell to $11.0 billion in the year to June 2025, down 0.8% from $11.1 billion in the year ending June 2024. Despite this modest contraction in spend, employment continued to grow, indicating that the sector remained resilient and supported more jobs across the visitor economy.

Figure 1: Filled Jobs in South Australian Tourism



Tourism employment increased across most jurisdictions, led by the Northern Territory (+9.2%), Queensland (+4.6%), New South Wales (+3.9%) and Victoria (+2.4%). South Australia also recorded growth (+1.4%), although this was below the national growth rate of 2.1%.

In contrast, employment declined in the Australian Capital Territory (-7.9%), Western Australia (-7.2%) and Tasmania (-1.4%).

Nationally, tourism employment increased by 2.1%, representing a positive result overall, although growth moderated from the stronger 4.9% increase recorded in 2023–24.

All states recorded strong employment growth compared with their pre-COVID results, with Western Australia (+28.9%), Victoria (+26.3%) and Queensland (+25.9%) achieving the strongest gains.

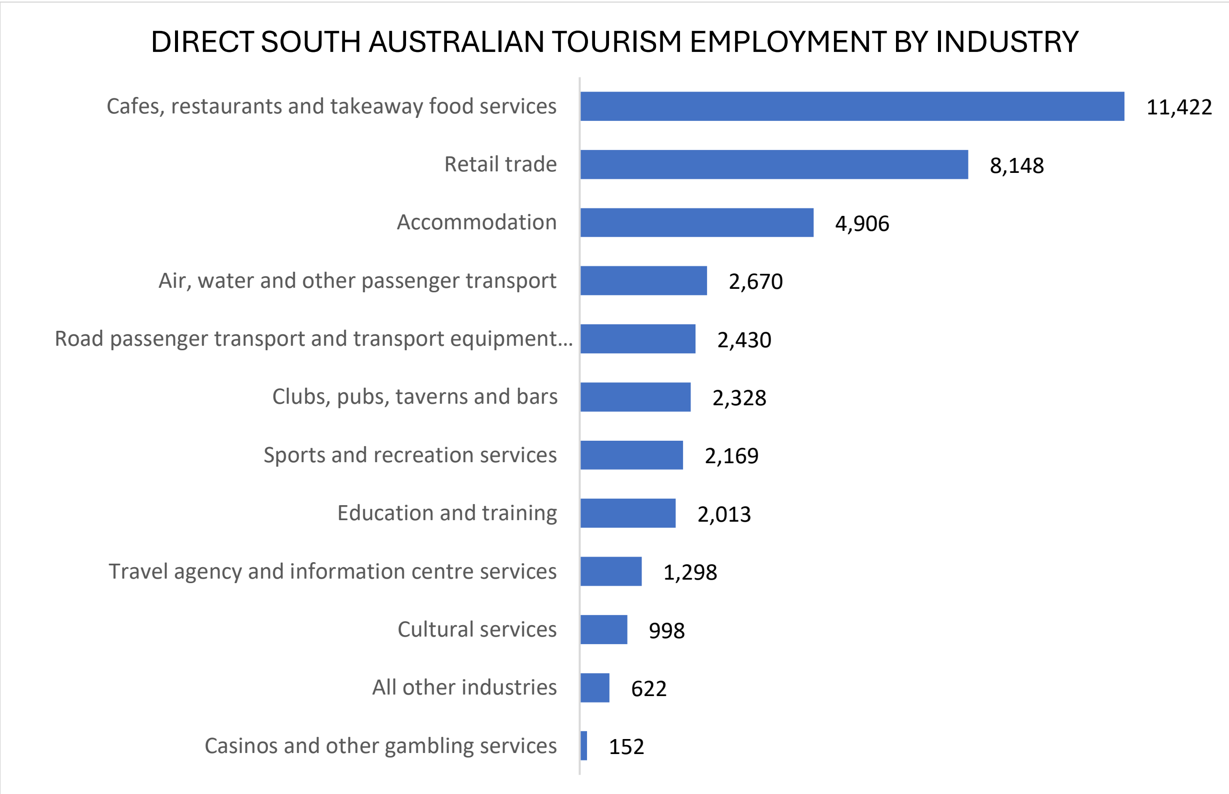
Nationally, employment increased by 23.1% over the same period, with South Australia outperforming the national average, recording growth of 23.6%.

Figure 2: Percentage Growth in Tourism Employment Compared with 2023-24

Direct tourism employment accounted for 3.7% of total employment in South Australia, in line with the 3.7% in 2023-24, and up when compared to 3.4% in 2018-19. This compares to a 4.4% contribution of direct tourism to all employment in Australia in 2024-25.

The main industries contributing to South Australian tourism employment remain cafes, restaurants and takeaway food services and retail trade, with accommodation, clubs, pubs, taverns and bars also making a significant contribution.

Figure 3: Direct South Australian Tourism Employment by Industry



In addition to those directly employed in tourism, the Tourism Satellite Account provides an estimate of indirect tourism employment. Indirect employment refers to the flow-on economic activity generated through businesses supplying goods and services to tourism operators. For example, the indirect tourism employment generated from supplying a meal to a visitor. This starts with production of what the restaurant needs to make the meal. This might include production of fresh produce or the generation of electricity for cooking.

The tourism industry indirectly employed an additional 30,700 people, bringing the total number of people employed in tourism to 69,800. Total tourism employment was up 2.4% on 2023-24 and 21.7% up compared to pre-COVID.

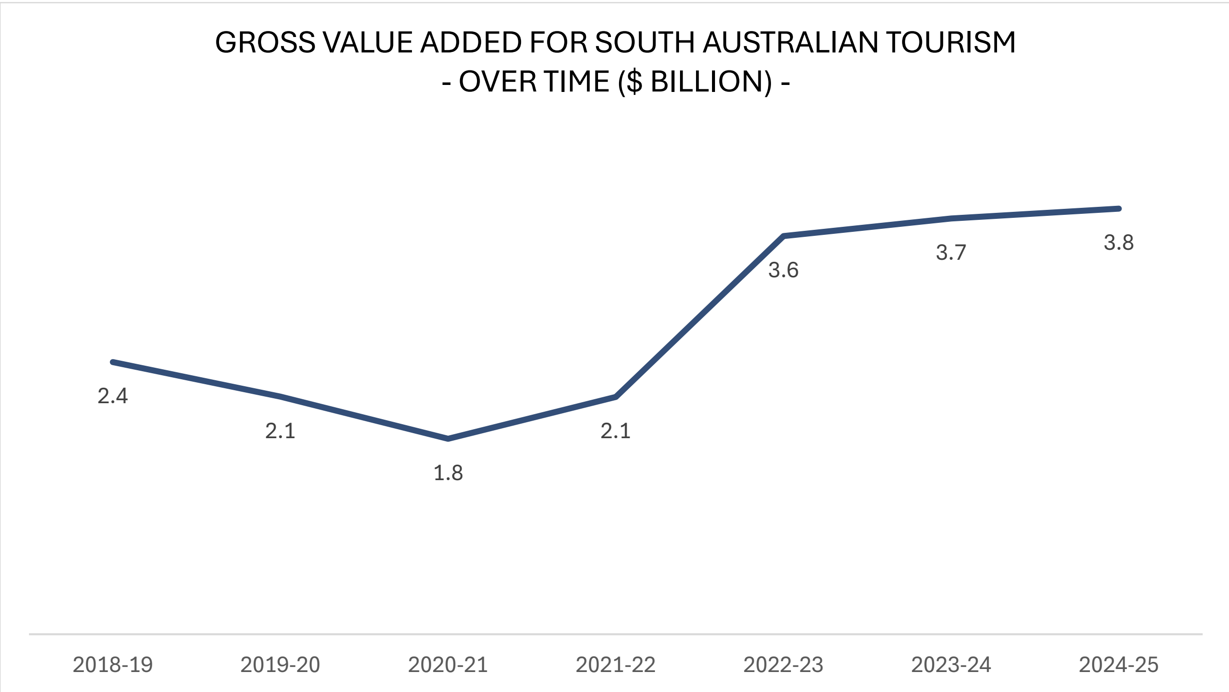
Please note that a breakdown of jobs in Adelaide compared to regions will be available when TRA releases the South Australian Regional Satellite Accounts.

Gross Value Added

Gross Value Added (GVA) is considered the most accurate measure of the contribution of the tourism industry to the economy as it is directly comparable with the value added of "conventional" industries such as mining and manufacturing. It includes the labour income and capital revenue received by the industry and the net taxes that the government received from production.

The direct GVA of tourism in South Australia was $3.8 billion in 2024-25, a 2.4% rise on last year and a 56.4% rise compared to the pre-COVID year 2018-19.

Figure 4: Gross Value Added for South Australian Tourism

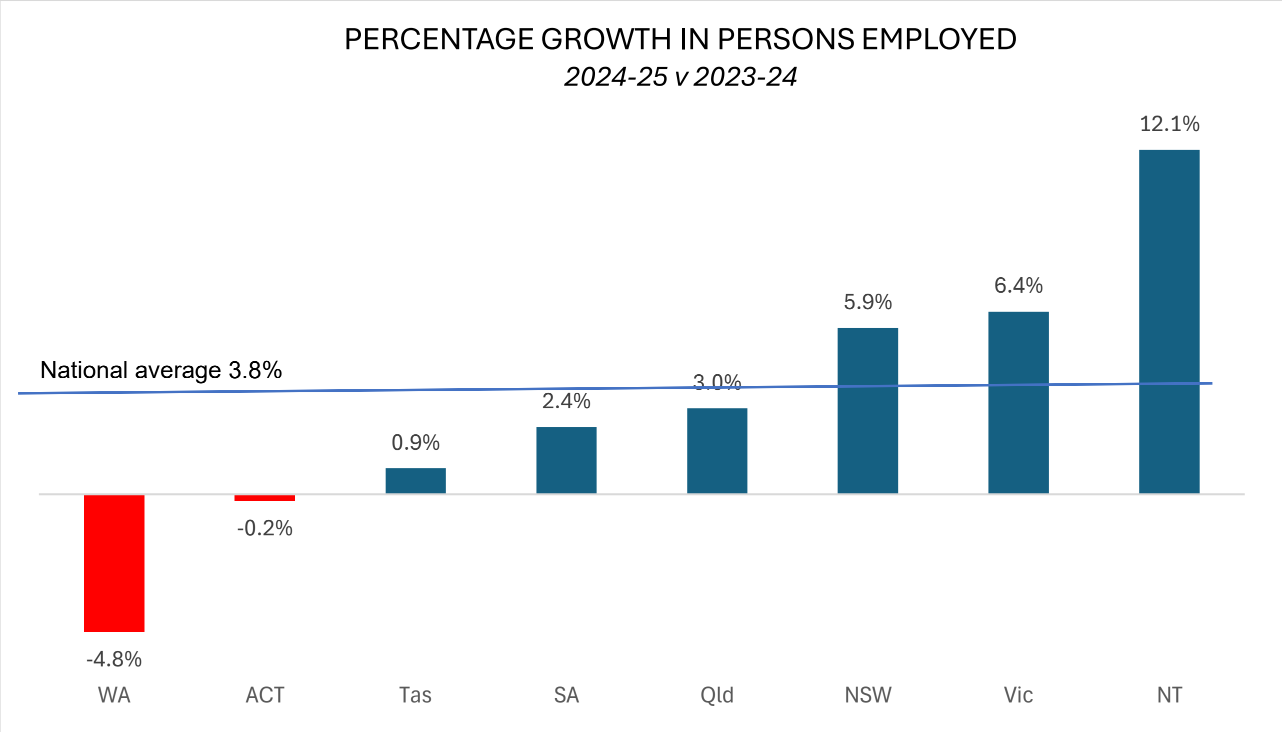


Compared with 2023–24, the Northern Territory, Victoria and New South Wales recorded growth in tourism GVA above the national average of 3.8%. South Australia, Queensland and Tasmania also experienced growth, although at rates below the national average. In contrast, the Australian Capital Territory and Western Australia recorded declines in tourism GVA over the year.

When compared with pre-COVID levels (2018–19), South Australia recorded the strongest growth in tourism GVA of any state or territory, increasing by 56.4%. This was followed by Queensland (+50.1%) and the Northern Territory (+48.3%).

As shown in Figure 5, South Australia's tourism GVA growth of 2.4% was below the national increase of 3.8%.

Figure 5: Percentage Growth in Tourism Gross Value Added Compared with 2023-24



Tourism Output

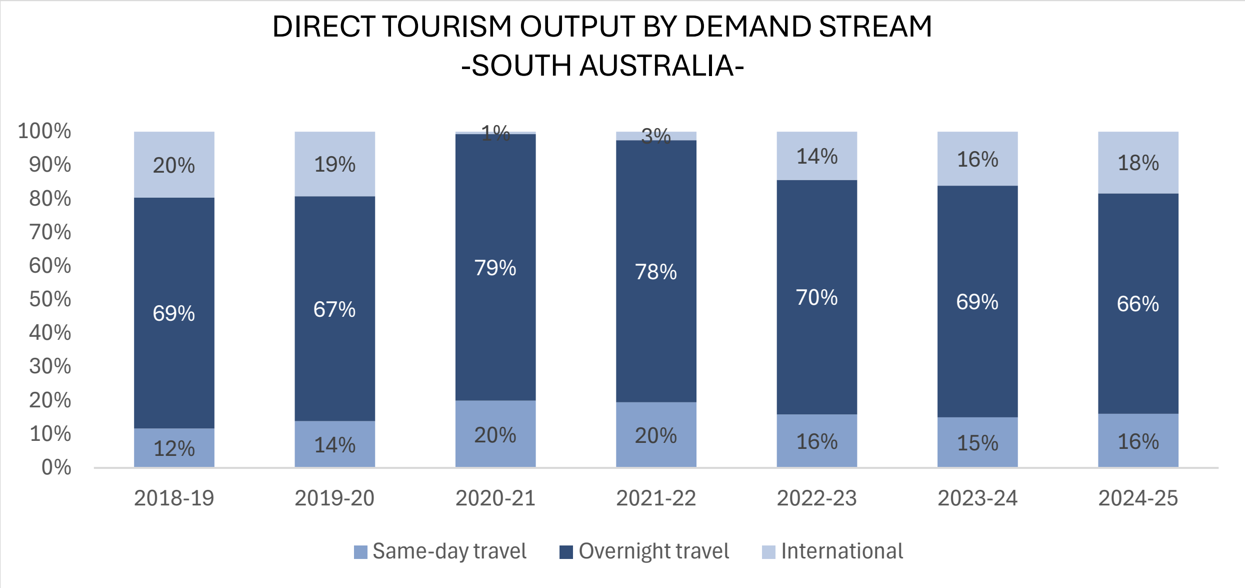
Tourism output is the value of goods and services, at basic prices, which are consumed by visitors and produced by industries in a direct relationship with visitors. It takes into account the sales or revenue less the cost of goods sold, or the service provided. Because it does not take into account the cost of running the business, or providing the service, it is the most equitable measure to consider the level of economic activity produced by each tourism demand stream and industry.

Demand Stream Contribution

In 2024–25, domestic overnight visitors remained the largest contributor to tourism output, although the latest State Tourism Satellite Accounts do not separate this segment into interstate and intrastate travel.

Over time, the composition of tourism output has shifted, with day trip visitors increasing their share from 12% in 2018–19 to 15% in 2023–24 and 16% in 2024–25. International visitors also increased their contribution, accounting for 18% of tourism output in 2024–25, up from 16% in 2023–24 and approaching the pre-pandemic share of 20% recorded in 2018–19. As a result, the share attributable to domestic overnight visitors declined from 69% in 2023–24 to 66% in 2024–25 and remains below the 69% share recorded in 2018–19.

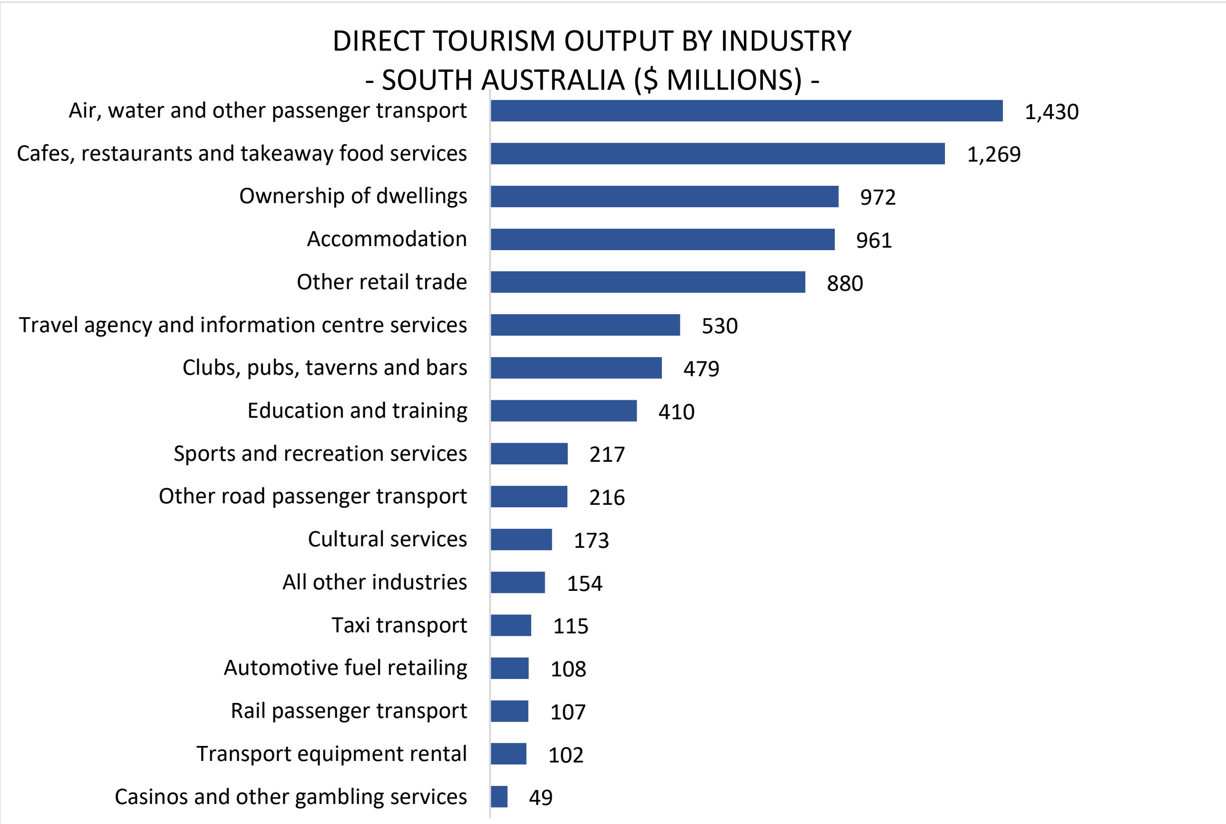
Figure 6: Direct Tourism Output by Demand Stream



Industry Contribution

In terms of industry, the strongest contribution to Tourism Output comes from air, water and other transport, the cafes, restaurants and takeaway food sector, ownership of dwellings, accommodation and other retail trade.

Figure 7: Direct Tourism Output by Industry



Technical note:
As is common with estimates of this kind, Tourism Research Australia regularly conducts a review of the underlying assumptions for these job estimates. This year with the movement to DoTS there has been a recast of data previously published from 2018-19 to 2024-25 results.

The Introduction of the Domestic Tourism Statistics (DoTS)

Tourism Research Australia (TRA) has introduced a major update to its domestic tourism data collection. From 1 January 2025, the new Domestic Tourism Statistics (DoTS) replaced the National Visitor Survey (NVS), combining traditional survey methods with large-scale mobile phone mobility data to deliver more accurate, reliable and geographically detailed tourism insights.

The introduction of DoTS, together with revisions to the Australian Bureau of Statistics' National Tourism Satellite Account (NTSA), has resulted in revisions to Tourism Satellite Account (TSA) estimates. As a result, newly published State Tourism Satellite Account (STSA) figures are not directly comparable with previously released results.

To support trend analysis, TRA has back cast state and territory TSA estimates to 2018–19 using the new methodology.

The updated model provides a more rigorous and flexible framework, allowing key inputs such as population growth to be updated and enabling more timely delivery of STSA results in future years. It also introduces additional reporting on tourism employment, including the gender composition of the workforce and the distribution of employment across tourism-related industries.

TRA has also developed a new integrated sub-national model for STSA and RTSA reporting. The model applies a consistent methodology across state and regional levels, can be updated over time, and is benchmarked to the NTSA, providing more cohesive, consistent and timely estimates of tourism's economic contribution across Australia.