ACKNOWLEDGMENTS

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Cover image: Students in a cooking class at Food I Am, Wagga Wagga, New South Wales. Image courtesy of Destination NSW.
INTRODUCTION

Tourism is an important driver of economic growth in Australia and around the world. Over the last five years, Australia’s tourism sector has grown by an average of 5.9% compared to 4% for the whole economy.

However, the economic value of tourism cannot be measured in the same way as other industries. This is because tourists participate in many different activities, which cut across many different industries.

To capture these complexities, the Australian Bureau of Statistics (ABS) developed the Tourism Satellite Accounts (TSA) as part of the Australian National Accounts. To ensure worldwide consistency these use an internationally accepted methodology developed by the Organisation for Economic Cooperation and Development (OECD) and the United Nations World Tourism Organization (UNWTO).

Tourism Research Australia (TRA) extends the work of the ABS by producing this report, the State Tourism Satellite Accounts (STSA). This report and accompanying statistical tables show the importance of tourism to the economy for each of Australia’s states and territories, presenting key data on consumption, employment and economic activity during 2018–19, along with longer term change.

As the relationship between tourism and the wider economy is constantly changing, assumptions used to construct the STSA are reviewed from time to time. As a result, this STSA uses the latest Input-Output tables generated by Victoria University’s Centre of Policy Studies and implemented with the assistance of the Griffith Institute for Tourism. More information about the impacts of these revisions on the STSA can be found in the Explanatory notes.

The STSA is also reliant on a range of other statistics, which are subject to revision from time to time. In particular, STSA inputs that have recent revisions include:

- TRA’s National Visitor Survey (NVS)
- ABS’ TSA results (against which STSA results are benchmarked for consistency)
- ABS’ Labour Force Survey (which forms the basis for tourism employment estimates)
- State Input-Output Tables (which reflect the current industry structure in the economy).

Due to these revisions, historical data from this report will differ from previous editions. Please see Explanatory notes for more information.

THE VALUE OF THIS REPORT

Tourism is a labour intensive sector with high international exposure and broad reach. Consequently, it is highly sensitive to social, environmental, and economic shocks. While Australia’s tourism industry recovered quickly from SARS (Severe Acute Respiratory Syndrome) and the Global Financial Crisis (GFC), the current round of shocks from bushfires and COVID-19 is a far greater challenge.

The value of a report like this is the accurate reflection it provides of tourism industry performance during a more typical economic environment. Therefore, it will be the benchmark against which tourism’s recovery for each state and territory can be assessed.

Box 1 – A challenging and critical time for the industry

The bushfires over the Australian summer combined with the COVID-19 pandemic will have widespread effects on the national economy.

Our tourism industry is particularly susceptible to these shocks with half of Australia’s 76 tourism regions affected by fires between September 2019 and February 2020, and over 30% of all spend coming from international visitors.

Adding to this vulnerability are the large number of small tourism businesses (95% in 2017–18), and a highly seasonal workforce made up of many part-time employees. In 2018–19, nearly half (48%) of workers employed in tourism were part time, compared with 31% of the national workforce.

This report includes insights on both these events, but in-depth analysis is not currently available. The March quarter International Visitor Survey and National Visitor Survey data will provide the first opportunity to measure the impacts of these events. Results from these surveys will be available in July 2020.
TOURISM CONSUMPTION

CONSUMPTION GROWTH

Total tourism consumption for 2018–19 was $152 billion, up 6.2% on the $143 billion figure for 2017–18. Almost three-quarters of this consumption came from domestic tourism, with growth in the domestic sector outpacing international growth in 2018–19 (Table 1).

### TABLE 1 NATIONAL CONSUMPTION FOR DOMESTIC AND INTERNATIONAL MARKETS, 2018–19

<table>
<thead>
<tr>
<th></th>
<th>Consumption</th>
<th>Share of National Consumption</th>
<th>% Change on Previous Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic overnight</td>
<td>$87.1b</td>
<td>57%</td>
<td>▲ 6.8% from $81.5b to $87.1b</td>
</tr>
<tr>
<td>Domestic day trips</td>
<td>$25.8b</td>
<td>17%</td>
<td>▲ 6.5% from $24.3b to $25.8b</td>
</tr>
<tr>
<td>International</td>
<td>$39.1b</td>
<td>26%</td>
<td>▲ 4.6% from $37.4b to $39.1b</td>
</tr>
<tr>
<td>Total tourism</td>
<td>$152.0b</td>
<td></td>
<td>▲ 6.2% from $143.2b to $152.0b</td>
</tr>
</tbody>
</table>

More than three-quarters (77%) of this consumption was in New South Wales (NSW) ($46.5 billion), Victoria ($36.1 billion), and Queensland ($34.6 billion). Western Australia (WA) ($15.1 billion) and South Australia (SA) ($9.0 billion) accounted for a further 16%. Tasmania ($4.5 billion), the Northern Territory (NT) ($3.1 billion) and the Australian Capital Territory (ACT) ($3.1 billion) accounted for the remaining 7% of consumption (Figure 1).
Box 2 Bushfires and the ongoing challenge for regional Australia

The bushfires over the Australian summer resulted in substantial income losses for regional operators as bookings were cancelled and visitors altered plans during what would have been the peak holiday season. Disruptions to supply also made it difficult for operators to service visitor needs and fully benefit from the community goodwill in the wake of the fires. Livelihoods are also under threat, with many regional operators continuing to struggle emotionally and not yet ready to return to work. More broadly, Australia’s international reputation as a pristine tourism destination was damaged due to misreporting by international media on the extent of the fires.

The impacts of the fires on tourism will resonate most strongly in regional Australia. Between September 2019 and February 2020, the fires affected half of Australia’s 76 tourism regions, with nine regions experiencing major destruction in December-January. With 95% of tourism spend in these nine regions coming from Australian residents, recovery efforts should focus on supporting domestic tourism.
All states and territories (except ACT) reported consumption growth in 2018–19, with growth rates varying as follows:

**Above average consumption growth:**
- WA – up 13.6% from $13.3 billion to $15.1 billion
- NT – up 11.7% from $2.8 billion to $3.1 billion
- Tasmania – up 9.8% from $4.1 billion to $4.5 billion
- Victoria – up 8.4% from $33.3 billion to $36.1 billion
- SA – up 7% from $8.4 billion to $9.0 billion.

**Below average consumption growth:**
- NSW – up 4.1% from $44.7 billion to $46.5 billion
- Queensland – up 3.4% from $33.5 billion to $34.6 billion.

**Declining consumption:**
- ACT – down 2% from $3.1 billion to $3.0 billion.

Across the states and territories, the relative importance of different tourism sectors varies (Figure 2):
- Day trips accounted for a greater share of consumption for NSW, Victoria and SA.
- Domestic overnight and total domestic (overnight plus day trips) accounted for a greater share of consumption for WA, Tasmania, NT, Queensland and ACT.

---

**FIGURE 2 DOMESTIC VISITOR SHARE OF CONSUMPTION SPEND BY STATE, 2018–19**

<table>
<thead>
<tr>
<th>State</th>
<th>Domestic Overnight</th>
<th>Domestic Day Trips</th>
<th>Domestic Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW</td>
<td>28%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>VIC</td>
<td>22%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>QLD</td>
<td>22%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>SA</td>
<td>6%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>WA</td>
<td>7%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>TAS</td>
<td>3%</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>NT</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>ACT</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>
LONG-TERM CHANGE

In the decade between 2008–09 and 2018–19, consumption increased 57% – an average annual growth rate of 4.6%.

Between 2008–09 and 2018–19, international consumption grew 66% from $23.5 billion to $39.1 billion. This coincided with a period when total international visitation grew from 5.5 million to 9.3 million, and education accounted for a greater share of international spend, with falls in share for holiday and visiting friends and relatives (VFR) spend. (Figure 3).

Growth in domestic tourism over this same period was more subdued. Between 2008–09 and 2018–19, there was 54% growth in domestic overnight consumption ($56.5 billion to $87.1 billion) and 53% growth in day trip consumption ($16.8 billion to $25.8 billion). The growth in domestic tourism was a result of:

- a 17% increase in Australia’s resident population from 21.7 million to 25.4 million
- a 23% increase in the cost of living
- people spending more time away from home. In 2018–19, Australians averaged 20 days of domestic overnight travel, compared with just 15 in 2008–09. The same period saw average day trips per Australian increase from 8 to 11 per year.

Results over this period (Figure 4) saw well above average growth for:

- day trip consumption for WA (up 77%) and SA (up 66%)
- domestic overnight consumption for WA (up 75%) and ACT (up 70%)
- international consumption for ACT (up 158%), Victoria (up 128%) and Tasmania (up 80%).

In contrast, well below average growth was reported for:

- day trip consumption for NT (up 32%) and ACT (up 41%)
- domestic overnight consumption for NT (up 25%), Queensland (up 41%) and SA (up 37%)
- international consumption for NT (down 12%), WA (up 22%) and Queensland (up 35%).

FIGURE 3 GROWTH IN INTERNATIONAL CONSUMPTION, AND THE CHANGING COMPOSITION OF SPEND
Box 3 The long shadow cast by COVID-19

The wide reaching nature of the pandemic has seen the United Nations World Tourism Organization revising global tourism receipts sharply downward, with Asia and the Pacific expected to be the worst affected.

Factors damaging to both domestic and international sectors of Australia’s visitor economy are:

- Escalation of travel restrictions. The introduction of travel restrictions to visitors from China on 1 February 2020 curtailed holiday travel from Australia’s largest inbound market, and had a major impact on international education, with over half of Chinese students overseas when restrictions were brought in. These restrictions were extended to Korea, Iran and Italy through early March, prior to a global travel ban on 20 March 2020.

- Sharp reductions in air capacity. This includes both domestic and international aviation and is an effort by airlines to reduce operating costs in response to the slow-down in demand.

- Social distancing, self-quarantining and bans on gatherings. Tourism is built on person-to-person interactions, and is vulnerable to dramatic changes in social behaviour.

- Restrictions on non-essential travel. Combined with state and territory border closures, these restrictions will heavily impact interstate and domestic overnight travel.
THE ECONOMIC IMPACT OF TOURISM

GROWTH IN GVA AND GDP

Total tourism GVA for 2018–19 was $55.9 billion, up 6.0% on 2017–18. Growth in tourism GDP was similar – up 6.0% to $60.8 billion. This was well ahead of the 5.3% growth in national GDP during the year. In 2018–19, tourism accounted for a 3.1% share of national GDP.

As with consumption, most GVA associated with tourism is concentrated in NSW, Victoria and Queensland. Collectively, these three states accounted for 77% of Australia’s tourism GVA. Growth in GVA for 2018–19 was highest for WA (up 13.6%), Tasmania (up 11.1%), Victoria (up 10.8%), NT (up 9.5%) and SA (up 8.3%). Similar trends were also present for GSP (Table 2).

TABLE 2: TOURISM GVA AND GSP BY STATE

<table>
<thead>
<tr>
<th></th>
<th>GVA</th>
<th>% CHANGE</th>
<th>GSP</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW</td>
<td>$17.1b</td>
<td>2.3%</td>
<td>$18.5b</td>
<td>2.3%</td>
</tr>
<tr>
<td>VIC</td>
<td>$13.5b</td>
<td>10.8%</td>
<td>$14.7b</td>
<td>10.7%</td>
</tr>
<tr>
<td>QLD</td>
<td>$12.7b</td>
<td>3.3%</td>
<td>$13.8b</td>
<td>3.3%</td>
</tr>
<tr>
<td>SA</td>
<td>$3.3b</td>
<td>8.3%</td>
<td>$3.6b</td>
<td>8.3%</td>
</tr>
<tr>
<td>WA</td>
<td>$5.5b</td>
<td>13.7%</td>
<td>$6.0b</td>
<td>13.8%</td>
</tr>
<tr>
<td>TAS</td>
<td>$1.6b</td>
<td>11.1%</td>
<td>$1.7b</td>
<td>11.2%</td>
</tr>
<tr>
<td>NT</td>
<td>$1.1b</td>
<td>9.5%</td>
<td>$1.2b</td>
<td>8.8%</td>
</tr>
<tr>
<td>ACT</td>
<td>$1.2b</td>
<td>-6.8%</td>
<td>$1.2b</td>
<td>-6.7%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$55.9b</td>
<td>6.0%</td>
<td>$60.8b</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

Box 4 Choosing between GVA and GDP/GSP

GVA is a less familiar economic measure than GDP and GSP (the state and territory equivalent of national GDP). However, GVA is a more accurate measure as it excludes taxes paid and accounts for the impact of subsidies. Both subsidies and taxes will vary across industries and states/territories, masking the true value of an economic activity and making comparisons more difficult.

However, when comparing the importance of tourism relative to the national or state and territory economy, GDP data is generally more widely available and, therefore, more frequently used.

The economic importance of international versus domestic tourism varies across states and territories (Figure 5):

- International tourism is a more significant component of the visitor economy for NSW and Victoria – accounting for 35% and 34% of GVA respectively.
- Domestic overnight tourism is especially significant for NT and Tasmania – accounting for 70% and 68% of GVA respectively.
- Day trips make significant contributions for all states (except the NT) – accounting for 10% or more of direct tourism total GVA.
FIGURE 5 SHARE OF GVA BY VISITOR TYPE AND STATE, 2018–19

<table>
<thead>
<tr>
<th>State</th>
<th>Domestic Overnight</th>
<th>Day Trips</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW</td>
<td>53%</td>
<td>13%</td>
<td>35%</td>
</tr>
<tr>
<td>VIC</td>
<td>52%</td>
<td>13%</td>
<td>34%</td>
</tr>
<tr>
<td>QLD</td>
<td>61%</td>
<td>12%</td>
<td>26%</td>
</tr>
<tr>
<td>SA</td>
<td>62%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>WA</td>
<td>65%</td>
<td>12%</td>
<td>23%</td>
</tr>
<tr>
<td>TAS</td>
<td>68%</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>NT</td>
<td>70%</td>
<td>5%</td>
<td>25%</td>
</tr>
<tr>
<td>ACT</td>
<td>61%</td>
<td>10%</td>
<td>29%</td>
</tr>
<tr>
<td>AUS</td>
<td>57%</td>
<td>13%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Image courtesy of Visit Victoria
A DECADE OF CHANGE

As visitor behaviours evolve and new attractions and infrastructure are developed, the nature of tourism will change. This in turn will alter the visitor mix for different states and territories. For example, using Gross Value Added as a measure of economic activity, the past decade has seen:

- SA move towards a more diversified visitor economy as its share of GVA from day trips and international visitors increased by 4 percentage points and 2 percentage points respectively.

- WA decrease its dependence on international visitors by 8 percentage points. Most of this shift in share has moved towards intrastate visitors, which now contribute nearly half of its direct tourism GVA.

- Victoria’s dependence on international visitors increase by 8 percentage points to more than a third, which has resulted in a declining share of day and interstate visitors.

- NSW remain relatively unchanged, continuing to have a high reliance on international tourism. This is due to it being the main gateway for international visitor arrivals.

- Queensland, with its large geographically dispersed population, growing its reliance on day trip and intrastate visitation.

- Domestic tourism continuing to be the mainstay for Tasmania, NT and the ACT. However, improved access and attractions has seen international tourism increase its GVA share for ACT and Tasmania. Because the NT population is small and mostly concentrated in Darwin, it continues to record a relatively small proportion of GVA from day trips.

<table>
<thead>
<tr>
<th></th>
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<th></th>
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<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW</td>
<td>68%</td>
<td>14%</td>
<td>13%</td>
<td>▼1</td>
<td>33%</td>
<td>33%</td>
<td>0</td>
<td>21%</td>
<td>20%</td>
<td>▼1</td>
<td>33%</td>
<td>35%</td>
<td>▲2</td>
</tr>
<tr>
<td>VIC</td>
<td>87%</td>
<td>17%</td>
<td>13%</td>
<td>▼4</td>
<td>29%</td>
<td>29%</td>
<td>0</td>
<td>27%</td>
<td>23%</td>
<td>▼4</td>
<td>27%</td>
<td>34%</td>
<td>▲8</td>
</tr>
<tr>
<td>QLD</td>
<td>52%</td>
<td>13%</td>
<td>15%</td>
<td>▲2</td>
<td>35%</td>
<td>33%</td>
<td>▲2</td>
<td>34%</td>
<td>29%</td>
<td>▼5</td>
<td>18%</td>
<td>20%</td>
<td>▲2</td>
</tr>
<tr>
<td>SA</td>
<td>56%</td>
<td>13%</td>
<td>12%</td>
<td>▲1</td>
<td>40%</td>
<td>47%</td>
<td>▲7</td>
<td>18%</td>
<td>18%</td>
<td>0</td>
<td>31%</td>
<td>23%</td>
<td>▼8</td>
</tr>
<tr>
<td>WA</td>
<td>73%</td>
<td>12%</td>
<td>12%</td>
<td>0</td>
<td>24%</td>
<td>24%</td>
<td>0</td>
<td>46%</td>
<td>43%</td>
<td>▼3</td>
<td>18%</td>
<td>20%</td>
<td>▼3</td>
</tr>
<tr>
<td>TAS</td>
<td>71%</td>
<td>12%</td>
<td>12%</td>
<td>0</td>
<td>22%</td>
<td>20%</td>
<td>▼2</td>
<td>44%</td>
<td>49%</td>
<td>▲6</td>
<td>29%</td>
<td>25%</td>
<td>▼4</td>
</tr>
<tr>
<td>ACT</td>
<td>104%</td>
<td>13%</td>
<td>10%</td>
<td>▲3</td>
<td>11%</td>
<td>10%</td>
<td>▼1</td>
<td>56%</td>
<td>51%</td>
<td>▼4</td>
<td>21%</td>
<td>29%</td>
<td>▼9</td>
</tr>
</tbody>
</table>
INDIRECT EFFECTS

Tourism also has a significant indirect effect on the economy. For example, purchasing a meal from a hotel will have a direct impact on Australia’s accommodation and food services sector. Beyond that, there are indirect impacts on the agricultural sector that grows the produce; the transport sector that delivers the produce; and the wholesale sector that sells the produce on to the hotel. When these indirect effects are factored in, tourism accounts for a 6.4% share of national economic activity as measured by GDP. For individual states and territories, the GSP share ranges from 4.3% for WA to 11.1% for Tasmania (Figure 6).
TOURISM EMPLOYMENT

EMPLOYMENT GROWTH

In the same way that tourism has direct and indirect economic impacts, there are also direct and indirect employment effects. As a result, tourism generates jobs across many different industries. This includes industries strongly associated with tourism such as accommodation, food services and retail trade, but also includes other industries such as agriculture and manufacturing that provide inputs to tourism.

Turning to direct impacts first, tourism employed 666,000 workers in 2018–19 – up 3.3% from the 645,000 employed persons in 2017–18. This is slightly above the 2.4% employment growth in the Australian workforce over the same period and equivalent to one-in-nineteen Australian workers. The total employment figure increases to 1,036,000 workers – over 8% of the national workforce – when indirect effects are applied.

FIGURE 7 DIRECT AND INDIRECT TOURISM EMPLOYMENT IN 2018–19, AND CHANGE OVER PREVIOUS YEAR

All states and territories – except the ACT – experienced growth in employment in 2018–19. For the ACT, direct employment decreased by 5.6% and indirect employment decreased by 2.8%. Growth was highest for WA, with direct employment up 9.5% and indirect employment up 13.3% (Figure 7).

The importance of tourism as a source of employment varies widely across each state and territory (Table 4). As shown by the earlier GSP figures, Queensland, NT and Tasmania have a strong economic reliance on tourism, which is reflected in higher tourism employment shares. In contrast, WA with its strong mining sector and Victoria and NSW with their larger, more diverse economies have a smaller share of their workforces employed in tourism.
TABLE 4 TOURISM'S SHARE OF TOTAL EMPLOYMENT, 2018–19

<table>
<thead>
<tr>
<th></th>
<th>NSW</th>
<th>VIC</th>
<th>QLD</th>
<th>SA</th>
<th>WA</th>
<th>TAS</th>
<th>NT</th>
<th>ACT</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct tourism share</td>
<td>4.7%</td>
<td>5.4%</td>
<td>5.8%</td>
<td>4.8%</td>
<td>5.0%</td>
<td>9.0%</td>
<td>6.3%</td>
<td>4.8%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Indirect tourism share</td>
<td>2.6%</td>
<td>2.5%</td>
<td>3.5%</td>
<td>2.7%</td>
<td>2.6%</td>
<td>8.4%</td>
<td>5.5%</td>
<td>3.3%</td>
<td>2.9%</td>
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<tr>
<td>Total tourism share</td>
<td>7.3%</td>
<td>7.8%</td>
<td>9.3%</td>
<td>7.5%</td>
<td>7.5%</td>
<td>17.4%</td>
<td>11.8%</td>
<td>8.2%</td>
<td>8.1%</td>
</tr>
</tbody>
</table>

WORKFORCE STRUCTURE

Due to the seasonal nature of the industry, the types of roles on offer, and a predominantly female workforce, tourism has a high proportion of part-time workers. In 2018–19, part-time workers made up 48% of the tourism workforce – well above the national figure of 32%.

The over-representation (around 50%) of part-time workers was evident across all states and territories – except for the NT where it was slightly lower than the national average (Figure 8).

FIGURE 8 SHARE OF THE PART-TIME WORKFORCE FOR TOURISM AND THE STATE TOTAL, 2018–19

Image courtesy of Josie Withers Photography and the South Australian Tourism Commission
While tourism cuts across twelve different industries, just three industries – Accommodation, Retail, and Food services (Cafes, restaurants and takeaways and clubs, pubs, taverns and bars) – account for 63% of all direct employment nationally. These three industries tend to account for a similar share of employment for most states and territories.

The main exceptions to this are Queensland and NT, which both have a lower share of tourism employment for accommodation but a higher share of employment for transport. This reflects the popularity of iconic, highly popular attractions such as Great Barrier Reef and Uluru, which are situated well away from the capital cities.
LONG-TERM CHANGE

As Australia's tourism industry has grown, it has become an increasingly important source of employment for Australian workers. Between 2008–09 and 2018–19, the number of workers directly employed in tourism has grown by 31%. When indirect effects are factored in, Australia's tourism workforce has grown by 40% over the same period.

Across Australia, total (direct and indirect) employment growth over this ten-year period was strongest for ACT (up 65%), Victoria (up 55%), Tasmania (up 53%), and NSW and WA (up 42% and 41%, respectively) (Figure 10).

FIGURE 10 GROWTH IN TOURISM EMPLOYMENT, 2008–09 TO 2018–19

For more information, go to www.tra.gov.au.