

The Western Australian Tourism Work Atlas

WESTERN AUSTRALIAN TOURISM EMPLOYMENT AND BUSINESS ATLAS



tourism
works
for Western Australia



Contents

1. Tourism Economy in Western Australia	4
2. Tourism Employment in Western Australia	5
3. Tourism Businesses in Western Australia	6
4. Tourism Employment by Industry	7
5. Tourism Employment by Commonwealth Electorate	12
6. Tourism Employment by State Electorate	13
7. Tourism Employment by Tourism Region	16
8. Tourism Employment by Region	16
9. Tourism Employment by Local Government Area	17
10. Glossary	21
11. Methodology	22

Acknowledgements

On behalf of the tourism industry, Tourism Council WA would like to thank the businesses and employees who volunteered to appear in the Tourism Works campaign video and this WA Tourism Work Atlas.

Tourism Council WA would like to acknowledge Tourism Research Australia for its important work in developing the Tourism Satellite Accounts and thanks the Tourism & Transport Forum for developing the employment atlas methodology.

Tourism Council WA also thanks Perth Airport, Crown Perth and the WA Local Government Association for their financial contribution to the research underpinning this report.

Tourism Works

The Tourism Works campaign aims to raise public and government awareness of the value of tourism for Western Australia. By featuring the latest data and real Western Australian workers, we hope to show how tourism works to create diverse jobs across the state.

The campaign is managed by Tourism Council WA on behalf of the tourism industry. Tourism Council WA is a non-profit membership body representing tourism businesses across WA.

For more information on the value of tourism to your local area go to www.tourismworks.com.au.





The WA Tourism **Work Atlas**

While the importance of tourism may seem obvious to those who live and work near some of Western Australia's tourism drawcards, such as Margaret River and Broome, the reality is that tourism is a key sector for many cities and regional areas across the state.

Visitors are significant consumers of a wide range of products including food, transport and accommodation. As visitors travel around Western Australia, their expenditure is dispersed across regions, industries and businesses. These businesses tend to be labour intensive, creating employment across the state.

The *WA Tourism Work Atlas* seeks to map tourism's contribution to business activity and employment across Western Australia to ensure that the significance of the visitor economy is better understood by decision makers and the broader community.

The *WA Tourism Work Atlas* uses the latest Tourism Satellite Accounts and the ABS Census to estimate and map tourism employment. But behind all the statistics there are real jobs creating income, wealth and social cohesion across Western Australia. The *WA Tourism Work Atlas* features real employees whose jobs are created by the valuable services they provide to visitors.



Evan Hall
Chief Executive Officer
Tourism Council WA



1. Tourism Economy in Western Australia

People travel to and around Western Australia for many reasons, including holidays, visiting friends and family, education, business, to attend events and more. As they travel around the State, visitors spend time and money in the local economy, creating work for employees and businesses.

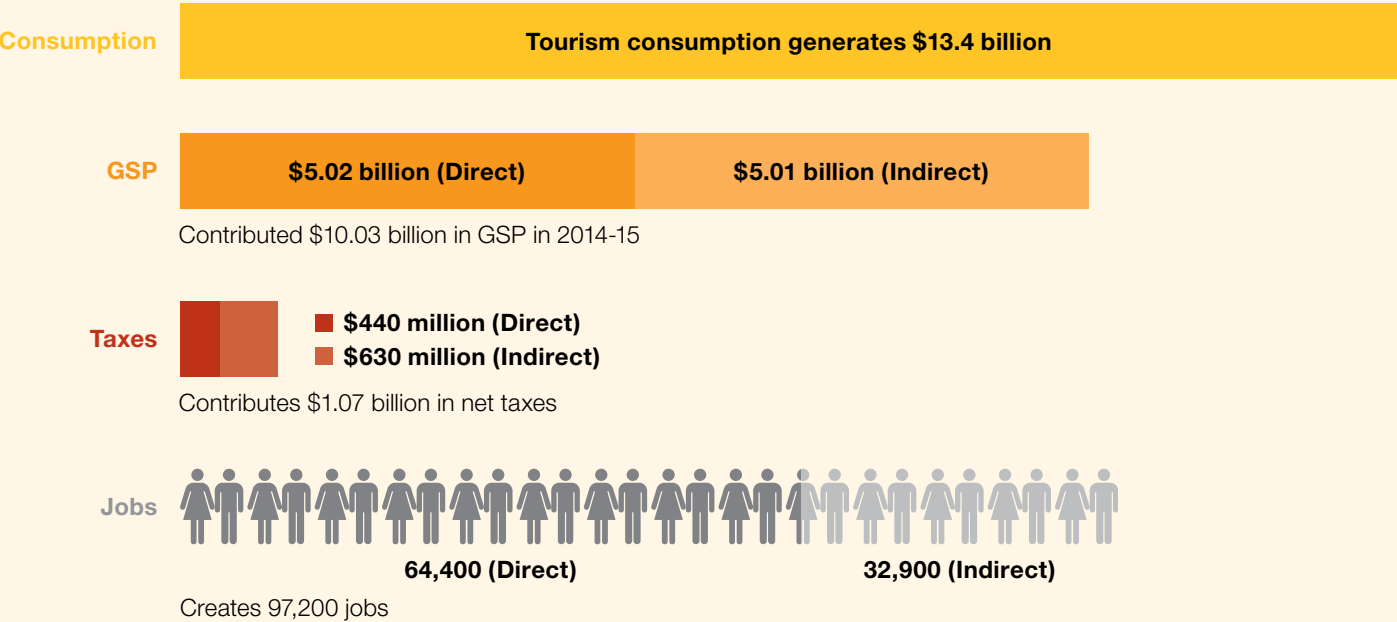
Tourism is a critical economic driver for Western Australia. Tourism consumption generates \$13.4 billion in overall expenditure for the state. Tourism contributed \$10.03 billion in gross state product (GSP) in 2014-15, including \$5.02 billion in direct GSP and another \$5.01 billion in flow-on indirect GSP, a 4.0% share of the Western Australian economy.¹

Domestic and international visitors spend an average of \$36.7 million in Western Australia every day.

The \$10.0 billion GSP generated by tourism consumption incorporates \$1.07 billion in net taxes including \$0.44 billion in direct taxes and another \$0.63 billion in flow-on indirect taxes.

Every Western Australian household would pay \$1,070 more in taxes without the tax revenue generated by tourism.²

The WA Tourism Economy



Source: Tourism Research Australia, State Tourism Satellite Accounts 2014-15.
NB. Jobs rounded to the nearest hundred. Totals may not add up due to rounding.

¹ Australian Bureau of Statistics, cat. no. 5249.0, *Tourism Satellite Account 2014-15* and Tourism Research Australia, *State Tourism Satellite Accounts 2014-15*.
² Estimate of households from Australian Bureau of Statistics, cat. no. 3236.0 - *Household and Family Projections, Australia, 2011 to 2036*.



2. Tourism Employment in Western Australia

The Australian Bureau of Statistics estimates direct tourism jobs at a national level through the Tourism Satellite Account. Building on this information, Tourism Research Australia provides state-level estimates for both direct and indirect jobs.

The State Tourism Satellite Accounts 2014-15 showed that tourism was directly responsible for 64,400 Full Time Equivalent (FTE) jobs across Western Australia. There were also another 32,900 indirect FTE jobs supported by tourism.³

The total tourism employment of 97,200 FTE accounts for 7.1% of Western Australian employment.

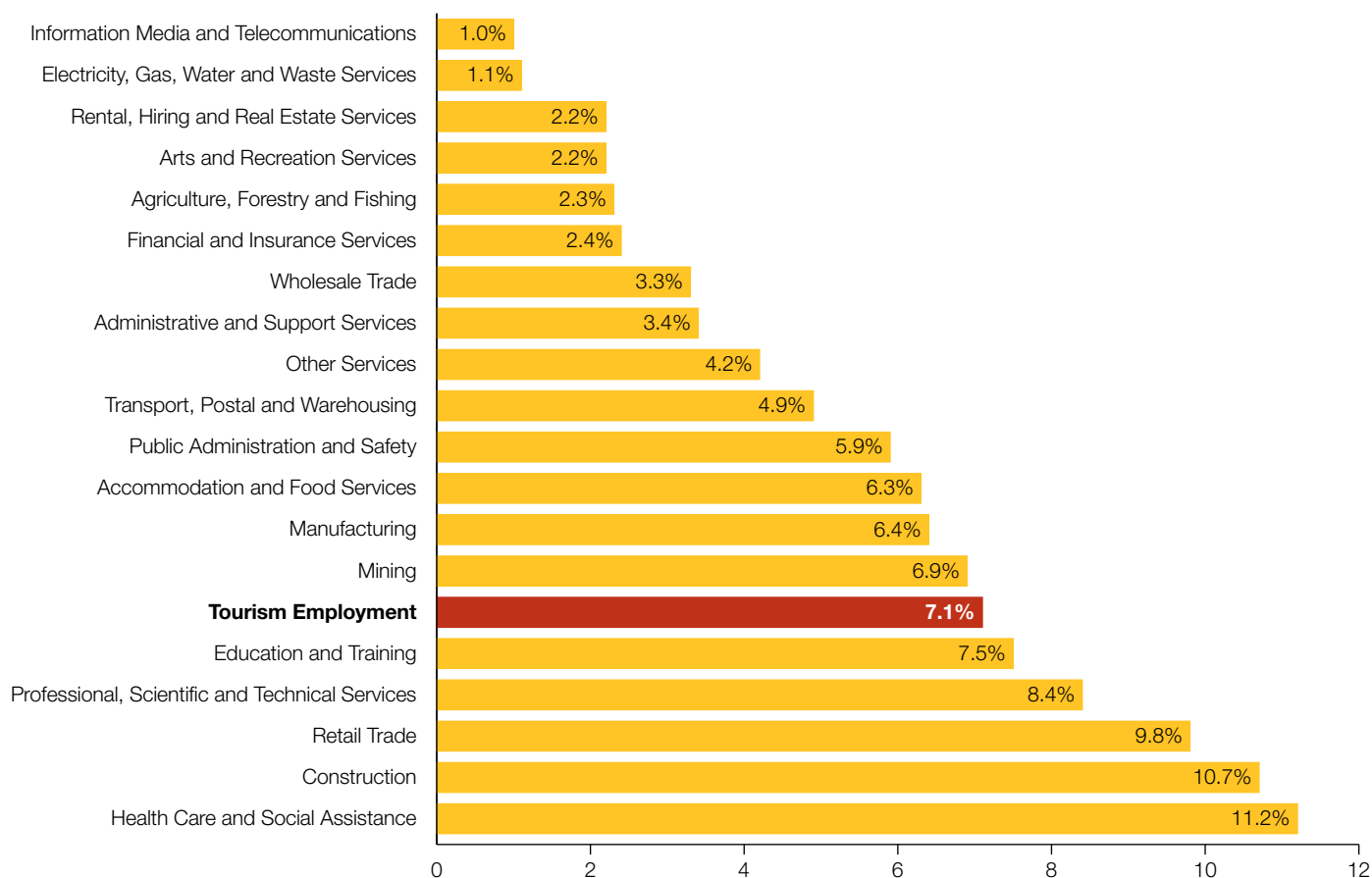
Tourism creates 97,200 jobs in Western Australia, including 64,400 direct jobs and another 32,900 indirect jobs.

In total, tourism generates 7.1% of employment in Western Australia. Tourism generates more jobs than traditional primary and secondary industries such as Agriculture, forestry and fishing (2.3%), Manufacturing (6.4%) and Mining (6.9%).⁴

Tourism employment extends beyond tour operators and those who work in hotels. It includes chefs and cooks, transport workers from pilots to taxi drivers, sales assistants and those who provide services to visitors across the state's cultural, attraction and entertainment offerings.

Comparison Tourism Employment vs Employment by Industry

(% Percentage of total WA employment)



³ ABS cat. no. 5249.0, *Tourism Satellite Account 2014-15* and Tourism Research Australia, *State Tourism Satellite Accounts 2014-15*.

⁴ Comparison of total tourism employment to employment by standard industry classifications, based on ABS cat 6291.0.55.003, *Labour Force, Australia, Quarterly, May 2015* and Tourism Research Australia, *State Tourism Satellite Accounts 2014-15*. Please note that tourism employment is a share of employment in each industry which was generated by tourism consumption.



3. Tourism Businesses in Western Australia

A tourism business is a business where a significant proportion of its products are consumed by visitors.⁵ Tourism businesses operate in many industries including accommodation, transport and retail.

Across Western Australia there were approximately 30,630 tourism businesses as at June 2015, representing 14% of all businesses.⁶ The mix of businesses varies across regions, with regional areas more likely to have a greater concentration of tourism businesses.

Industry	Tourism Businesses
Accommodation	1,180
Ownership of dwellings	4,730
Cafes, restaurants and takeaway food services	6,190
Clubs, pubs, taverns and bars	860
Road and rail transport	1,670
Air, water and other transport	640
Motor Vehicle Hiring	180
Travel agency and tour operator services	410
Cultural services	1,090
Casinos and other gambling services	180
Sports and recreation services	990
Retail trade - fuel retailing	340
Retail trade - food retailing	2,410
Retail trade - other	10,080
Total	30,950

NB: Rounded to tens. Totals may not add up due to rounding.
Industries ranked by proportion of output due to tourism consumption.

Simon Stevenson, *Manager – BP Broome Central*

BP Broome Central is dependent on visitors on self-drive holidays. Tourism customers generate up to 30% of BP Broome Central’s annual revenue. The business employs eight workers.

⁵ Tourism businesses fall into two categories: tourism characteristic and tourism connected businesses. Tourism characteristic businesses are those that would either cease to exist in their present form (or would be significantly affected) if tourism were to cease. Tourism connected businesses are those for which a tourism product is directly identifiable, and where the products are consumed by visitors in volumes which are significant for the visitor or the producer.

⁶ Australian Bureau of Statistics cat 8165.0 - Counts of Australian Businesses, including Entries and Exits, Jun 2011 to Jun 2015. NB there are approximately 30,950 in Western Australia as at June 2015, of which 300-400 businesses are unallocated to a geographic location below state level.



4. Tourism Employment by Industry

Tourism is a key contributor to employment in Western Australia, providing jobs across a broad set of related industries. While the number of jobs is the highest in the accommodation, retail and restaurant industries, tourism also contributes to employment in the transport, education and travel services industries, among others.

Industry	Tourism Employment
Accommodation	10,500
Cafes, restaurants and takeaway food services	18,200
Clubs, pubs, taverns and bars	3,900
Rail transport	100
Road transport and motor vehicle rental	1,800
Air, water and other transport	4,000
Travel agency and tour operator services	5,200
Cultural services	800
Casinos and other gambling services	300
Other sports and recreation services	1,800
Retail trade	9,700
Education and training	4,900
All other industries	3,200
Total Direct	64,400
Indirect Employment	32,900
Total WA Employment	97,200

NB: Rounded to tens. Totals may not add up due to rounding.
Industries ranked by proportion of output due to tourism consumption.



Jeanette Ferreira, *Director of Operations – Perth Convention & Exhibition Centre*

The Perth Convention & Exhibition Centre attracts more than 900,000 visitors each year to approximately 600 conferences and events. The Centre employs up to 350 workers.

Accommodation

Visitors are the main consumers of commercial *accommodation* including:

- Hotels, motels and resorts
- Serviced apartments
- Hostels, B&Bs and student residences
- Caravan parks and holiday homes

Accommodation	
Tourism Output	\$1.9 billion
Direct Tourism Employment	10,500



Annabelle Ferridge, *Room Attendant – Novotel Perth Langley (Accor)*

The Novotel Perth Langley hosts a mix of corporate, aircrew and leisure guests in over 250 rooms. The hotel is part of Accor Hotels, the largest hotel group in Western Australia. The Novotel Perth Langley welcomes more than 105,000 guests each year and employs 165 workers.



Food & Hospitality

Visitors are significant consumers of *food and hospitality services*, including:

- Cafes and restaurants
- Catering, takeaway and food trucks
- Pubs, clubs, taverns and bars

Food & Hospitality	
Tourism Output	\$1.6 billion
Direct Tourism Employment	22,100



Tony Howell, Executive Chef – Margaret River Hospitality Group

More than 30% of guests who dine at the Group’s restaurants are interstate and overseas visitors. The Margaret River Hospitality Group employs approximately 100 workers.

Transport

Visitors travelling to and around Western Australia are significant consumers of *transport* including:

- Taxis, buses and road transport
- Motor vehicle hire
- Air, water and rail transport
- Scenic and sightseeing transport
- Airports and transport support services

Transport	
Tourism Output	\$2.9 billion
Direct Tourism Employment	5,900



Mel McGowan, Skipper – Captain Cook Cruises

Captain Cook Cruises carries more than 250,000 passengers each year with 68% of their passengers coming from interstate or overseas. Captain Cook Cruises employs over 100 workers.

Education and Training

Visitors are significant consumers of *training and education services* including universities and vocational education and training.

Education and Training	
Tourism Output	\$415 million
Direct Tourism Employment	4,900

N.B. These output and employment figures only include visitors who stay in Western Australia for 12 months or less. International students who stay for more than a year are not classed as visitors. Therefore these figures only represent a portion of the value of international education. The total value of international education is \$1.4 billion.



Ross Dowling, Professor – Edith Cowan University

Edith Cowan University teaches more than 4,000 international students each year and employs more than 1,770 workers. International Education is worth \$1.4 billion to the WA economy.



Cultural and Recreational Services

Visitors are significant consumers of *cultural and recreational services* including:

- Nature parks, zoos and gardens
- Creative and performing arts
- Sports and physical recreation
- Racing, casino and gambling
- Museums, amusement parks and recreational activities

Cultural and Recreational Services

Tourism Output	\$420 million
Direct Tourism Employment	2,900



Corioli Souter, Curator Maritime Archaeology – WA Maritime Museum

The WA Maritime Museum branch in Fremantle attracts more than 110,000 visitors each year. The Museum is very popular with international visitors, with 24% of guests visiting from overseas.

Retail Trade

Visitors are significant consumers of *retail* goods, from groceries and necessities, through to souvenirs and luxury goods, including:

- Fuel, liquor, supermarkets and groceries
- Sports, camping and recreational goods
- Clothing, footwear, jewellery and personal accessories
- Antiques, souvenirs and other goods

Retail

Tourism Output	\$950 million
Direct Tourism Employment	9,700



Ulrike Pearson, Retail Store Manager – Willie Creek Pearls

The Willie Creek Pearl Farm in Broome attracts more than 20,000 visitors each year, of whom 53% are interstate and overseas visitors. Willie Creek employs up to 70 workers in the high season.

Travel Agency and Tour Operator Services

Visitors are significant consumers of *travel agency and tour operator services* to book and organise their visit to Western Australia, including:

- Booking services
- Travel agency operations
- Arranging and assembling tours
- Inbound tour operator services
- Tour wholesaling and retailing services

Travel Agency and Tour Operator Services

Tourism Output	\$390 million
Direct Tourism Employment	5,200



Claire Innes, Head of Product Department – Discover Australia Holidays

Discover Australia Holidays develops popular holiday packages that promote all regions of Western Australia to holidaymakers. Discover Australia Holidays assists with more than 100,000 visitors each year and employs up to 47 workers.



Eamon O'Brien
Mechanical Fitter – Adventure World



Emily Anderson
Waitress – The Terrace Hotel



Rickie Bacon
Workshop Manager - ADAMS

Other Industries

Visitor spending contributes to many other industries across Western Australia. For example, visitors often travel to the source to enjoy the best of *agriculture and fishing*, as well as *beer and wine producers*.

Tourism also boosts local *manufacturing*, particularly *food products* and *transport manufacturing*, such as caravans, campervans and boat building. Visitors are also the ultimate users of services ranging from *visitor centres* through to *hotel construction*.



Hope Metcalf
Senior Winemaker – Sandalford Wines



Troy Bennell
Tour Operator – Ngalang Wongi Tours



Dave Humphreys
Sales & Marketing Manager – Perth Arena



David Thompson
Managing Director – Lobster Shack



Michael Barsby
Skills Development Specialist – Crown Perth



Courtney Willson
Assistant Manager Café – Hyatt Regency Perth



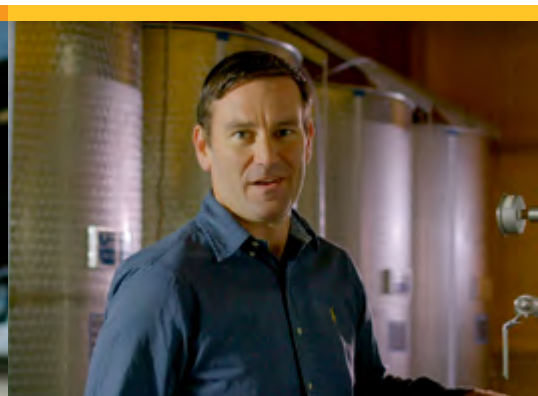
Gillian Rowe
Rental Supervisor – Budget Car & Truck Rental WA



Ben Foy
Music Director – What Noiz



Leslie McChesney
Helicopter Pilot - Heliwest



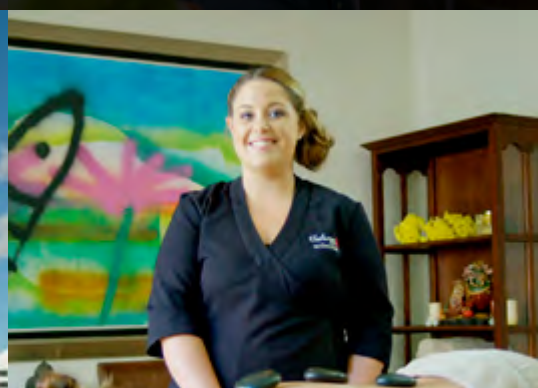
Adrian Kenny
Cider Maker – CORE Cider House



Rebecca Minchinton
Chocolatier – Margaret River Chocolate Company



James Hastie
Site Supervisor – Brookfield Multiplex



Jessica Munn
Beauty Therapist – Cable Beach Club Resort & Spa



Dale Tilbrook
Manager – Maalinup Aboriginal Gallery



Gabby Simoni
Marketing Coordinator – Australia's Golden Outback



Kristy-Lee Roberts
RV Assembler – Fleetwood RV



Edward Whisson
Crew Supervisor – Rottnest Express



Matt Norton Visitor Services Manager –
Margaret River Busselton Tourism Association



Ben Clarke
Pilot - Qantas



5. Tourism Employment by Commonwealth Electorate

Western Australia has 16 Commonwealth Electoral Divisions for the House of Representatives. The following table estimates the number of FTE persons employed by tourism who reside within the electorate.

Commonwealth Electoral Division	Tourism Employment
Brand	3,200
Burt	3,040
Canning	3,430
Cowan	3,630
Curtin	4,150
Durack	6,200
Forrest	3,640
Fremantle	3,930
Hasluck	4,050
Moore	4,020
O'Connor	4,000
Pearce	3,600
Perth	4,970
Stirling	3,610
Swan	5,040
Tangney	3,860
Total Direct	64,380
Indirect Employment	32,870
Total WA	97,240

NB: Rounded to tens.
Totals may not add up due to rounding.





6. Tourism Employment by State Electorate

Western Australia has 59 Legislative Assembly districts grouped into six Legislative Council regions. The following tables estimate the number of FTE persons employed by tourism who reside within the electorate and the number of tourism related businesses located in the electorate.

6.1 Legislative Council Regions

Electoral Region	Tourism Employment	Tourism Businesses
North Metropolitan Region	16,050	9,550
East Metropolitan Region	15,220	6,380
South Metropolitan Region	16,470	7,460
Agricultural Region	3,720	1,980
South West Region	8,160	3,790
Mining and Pastoral Region	4,760	1,470
Total Direct	64,380	30,950
Indirect Employment	32,870	
Total WA Employment	97,240	

NB: Rounded to tens. Totals may not add up due to rounding and unallocated tourism businesses.

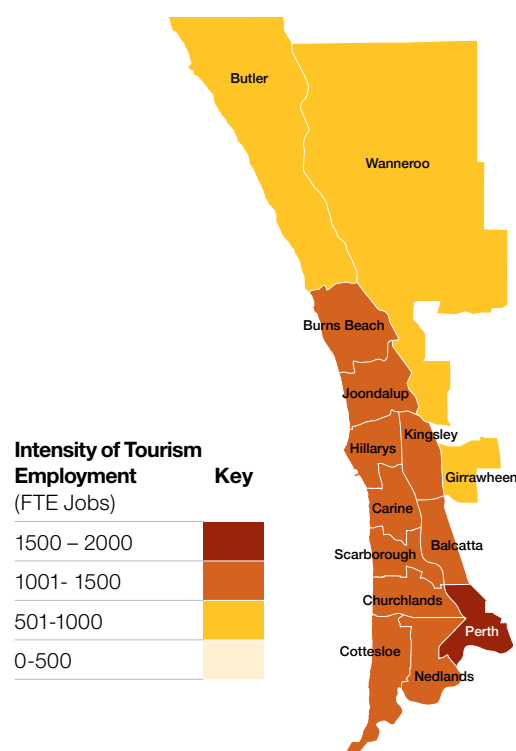


6.2 Legislative Assembly Districts

North Metropolitan Region

Districts	Tourism Employment	Tourism Businesses
Balcatta	1,190	690
Burns Beach	1,190	410
Butler	850	210
Carine	1,030	440
Churchlands	1,100	600
Cottesloe	1,110	830
Girrawheen	980	530
Hillarys	1,150	440
Joondalup	1,230	450
Kingsley	1,050	350
Nedlands	1,130	1,060
Perth	1,890	2,460
Scarborough	1,210	790
Wanneroo	950	290
Total Direct	16,050	9,550

NB: Rounded to tens. Totals may not add up due to rounding.

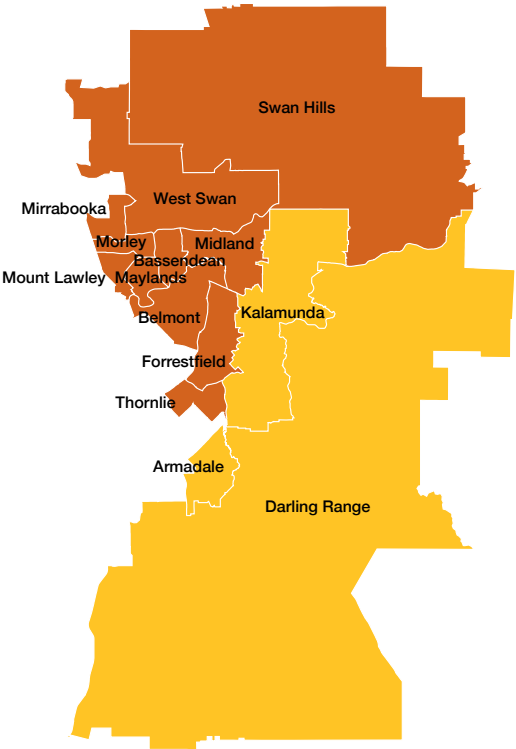




East Metropolitan Region

Districts	Tourism Employment	Tourism Businesses
Armadale	940	280
Bassendean	1,100	440
Belmont	1,360	650
Darling Range	810	370
Forrestfield	1,030	360
Kalamunda	900	360
Maylands	1,380	620
Midland	1,050	490
Mirrabooka	1,070	400
Morley	1,060	490
Mount Lawley	1,320	640
Swan Hills	1,060	330
Thornlie	1,080	380
West Swan	1,040	560
Total Direct	15,220	6,380

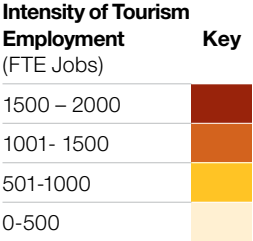
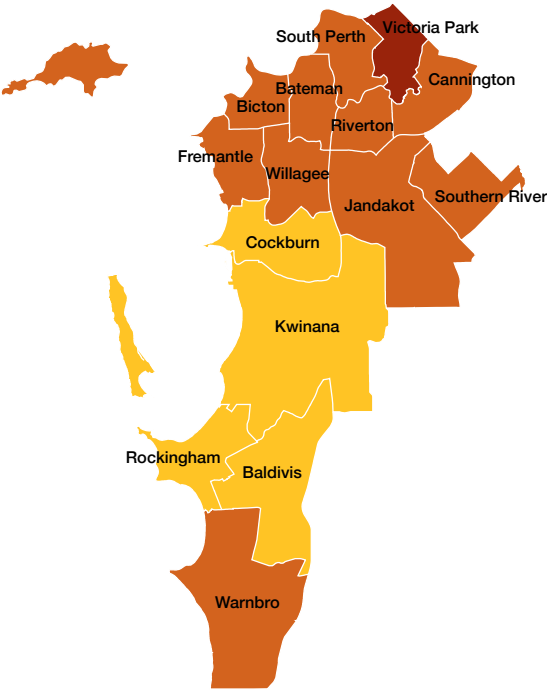
NB: Rounded to tens. Totals may not add up due to rounding.



South Metropolitan Region

Districts	Tourism Employment	Tourism Businesses
Baldivis	820	190
Bateman	1,100	670
Bicton	1,010	550
Cannington	1,230	600
Cockburn	990	330
Fremantle	1,080	840
Jandakot	1,080	590
Kwinana	860	280
Riverton	1,100	480
Rockingham	870	370
Southern River	1,100	380
South Perth	1,410	650
Victoria Park	1,670	840
Warnbro	1,030	250
Willagee	1,110	420
Total Direct	16,470	7,460

NB: Rounded to tens. Totals may not add up due to rounding.





Agricultural Region

Districts	Tourism Employment	Tourism Businesses
Central Wheatbelt	790	470
Geraldton	1,050	420
Moore	970	470
Roe	910	610
Total Direct	3,720	1,980

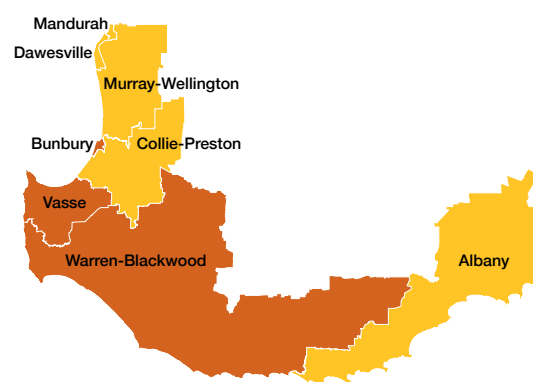
NB: Rounded to tens. Totals may not add up due to rounding.



South West Region

Districts	Tourism Employment	Tourism Businesses
Albany	970	510
Bunbury	1,030	590
Collie-Preston	910	370
Dawesville	890	290
Mandurah	840	420
Murray-Wellington	780	330
Vasse	1,390	590
Warren-Blackwood	1,350	700
Total Direct	8,160	3,790

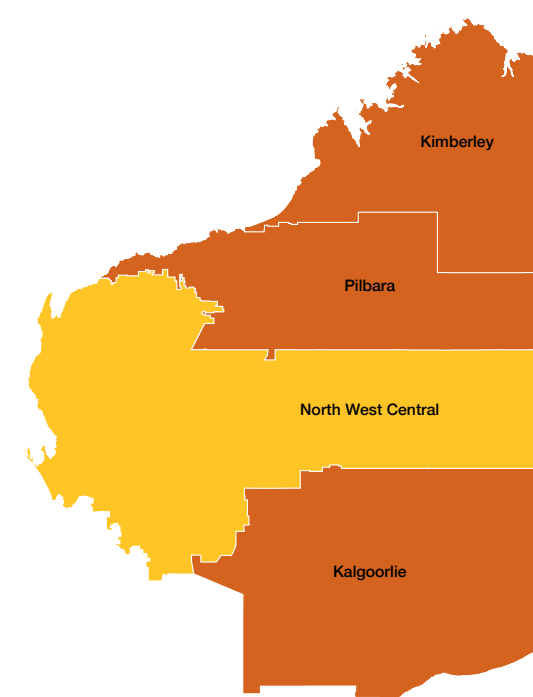
NB: Rounded to tens. Totals may not add up due to rounding.



Mining and Pastoral Region

Districts	Tourism Employment	Tourism Businesses
Kalgoorlie	1,070	380
Kimberley	1,350	510
North West Central	950	280
Pilbara	1,390	300
Total Direct	4,760	1,470

NB: Rounded to tens. Totals may not add up due to rounding.



Intensity of Tourism Employment (FTE Jobs)	Key
1500 – 2000	
1001- 1500	
501-1000	
0-500	

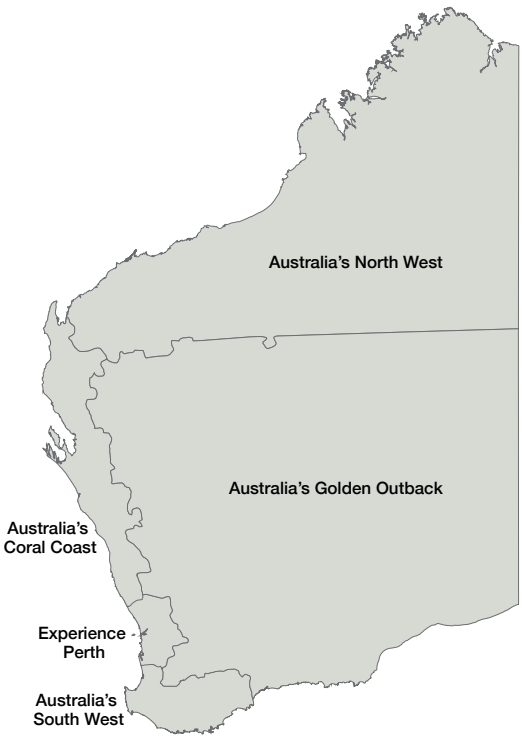


7. Tourism Employment by Tourism Region

Western Australia has five official Tourism Regions. Each Tourism Region is promoted to international and domestic visitors by its Regional Tourism Organisation (RTO). Expenditure by visitors staying in these Tourism Regions creates direct employment.

Tourism Region	Tourism Employment	Tourism Businesses
Australia's Coral Coast	2,210	930
Australia's Golden Outback	2,400	1,180
Australia's North West	3,030	850
Australia's South West	6,240	3,070
Experience Perth	50,490	24,590
Total Direct	64,380	30,950
Indirect Employment	32,870	
Total WA Employment	97,240	

NB: Rounded to tens. Totals may not add up due to rounding and unallocated tourism businesses.



8. Tourism Employment by Region

Western Australia has nine official Regions and corresponding Regional Development Commissions (RDCs). The objective of the RDCs is to maximise job creation and to develop and broaden the economic base of the region.

Region	Tourism Employment	Tourism Businesses
Gascoyne	550	200
Goldfields-Esperance	1,570	640
Great Southern	1,450	840
Kimberley	1,390	510
Mid West	1,600	660
Peel	2,560	1,080
Pilbara	1,660	350
South West	4,870	2,230
Wheatbelt	1,530	930
Total Regions	17,180	7,440
Perth Metropolitan Area	47,190	23,110
Total Direct	64,370	30,950
Indirect Employment	32,870	
Total WA Employment	97,240	

NB: Rounded to tens. Totals may not add up due to rounding and unallocated tourism businesses.





9. Tourism Employment by Local Government Area

Western Australia currently has 137 Local Government Areas (LGA), including 29 in the Perth Metropolitan Area and 108 in regional areas. The following tables estimate the number of FTE persons employed by tourism who reside within the LGA and the number of tourism related businesses located in the LGA.

Metropolitan Local Government Areas

Local Government Area	Tourism Employment	Tourism Businesses
Armadale, City of	1,480	530
Bassendean, Town of	420	150
Bayswater, City of	2,010	950
Belmont, City of	1,220	580
Cambridge, Town of	710	450
Canning, City of	2,670	1,320
Claremont, Town of	280	230
Cockburn, City of	2,500	980
Cottesloe, Town of	210	180
East Fremantle, Town of	220	110
Fremantle, City of	880	910
Gosnells, City of	2,760	1,040
Joondalup, City of	4,590	1,680
Kalamunda, Shire of	1,410	500
Kwinana, City of	650	170
Melville, City of	2,910	1,420
Mosman Park, Town of	270	130
Mundaring, Shire of	880	360
Nedlands, City of	530	450
Peppermint Grove, Shire of	50	60
Perth, City of	800	1,600
Rockingham, City of	2,500	770
South Perth, City of	1,390	640
Stirling, City of	5,960	3,040
Subiaco, City of	560	590
Swan, City of	3,050	1,340
Victoria Park, Town of	1,190	640
Vincent, City of	1,270	940
Wanneroo, City of	3,840	1,360
Total Direct	47,190	23,110

NB: Rounded to tens. Totals may not add up due to rounding.



Ben Clarke, Pilot - Qantas

The Qantas group operates approximately 830 flights per week to, from and within Western Australia, carrying an approximate 4.3 million passengers each year. Qantas directly employs more than 1,800 people in Western Australia.



Regional Local Government Areas

Gascoyne Region

Local Government Area	Tourism Employment	Tourism Businesses
Carnarvon, Shire of	240	100
Exmouth, Shire of	210	70
Shark Bay, Shire of	90	30
Upper Gascoyne, Shire of	-	-
Total Direct	550	200

Goldfields Region

Local Government Area	Tourism Employment	Tourism Businesses
Coolgardie, Shire of	70	20
Dundas, Shire of	60	10
Esperance, Shire of	410	220
Kalgoorlie-Boulder, City of	890	340
Laverton, Shire of	30	-
Leonora, Shire of	60	10
Menzies, Shire of	-	-
Ngaanyatjarraku, Shire of	10	-
Ravensthorpe, Shire of	40	30
Total Direct	1,570	640

Great Southern Region

Local Government Area	Tourism Employment	Tourism Businesses
Albany, City of	960	490
Broomehill-Tambellup, Shire of	20	10
Cranbrook, Shire of	10	10
Denmark, Shire of	190	110
Gnowangerup, Shire of	20	30
Jerramungup, Shire of	30	20
Katanning, Shire of	80	50
Kent, Shire of	10	10
Kojonup, Shire of	40	40
Plantagenet, Shire of	100	60
Woodanilling, Shire of	-	10
Total Direct	1,450	840

Kimberley Region

Local Government Area	Tourism Employment	Tourism Businesses
Broome, Shire of	830	280
Derby-West Kimberley, Shire of	160	70
Halls Creek, Shire of	60	20
Wyndham-East Kimberley, Shire of	340	140
Total Direct	1,390	510

Mid West Region

Local Government Area	Tourism Employment	Tourism Businesses
Carnamah, Shire of	10	10
Chapman Valley, Shire of	20	10
Coorow, Shire of	30	20
Cue, Shire of	10	-
Greater Geraldton, City of	1,050	430
Irwin, Shire of	140	50
Meekatharra, Shire of	30	10
Mingenew, Shire of	10	10
Morawa, Shire of	20	10
Mount Magnet, Shire of	20	10
Murchison, Shire of	-	-
Northampton, Shire of	180	80
Perenjori, Shire of	30	10
Sandstone, Shire of	-	-
Three Springs, Shire of	20	10
Wiluna, Shire of	20	10
Yalgoo, Shire of	10	-
Total Direct	1,600	660

Peel Region

Local Government Area	Tourism Employment	Tourism Businesses
Boddington, Shire of	50	10
Mandurah, City of	1,690	690
Murray, Shire of	350	160
Serpentine-Jarrahdale, Shire of	390	180
Waroon, Shire of	60	40
Total Direct	2,560	1,080

NB: Rounded to tens. Totals may not add up due to rounding and unallocated tourism businesses.
Where no data is listed, an estimate is not possible due to small sample size or confidentiality of data.



Alison Bird, Operator – Broome Camel Safaris

Broome Camel Safaris welcomes more than 20,000 visitors each year and employs around eight workers.

Pilbara Region

Local Government Area	Tourism Employment	Tourism Businesses
Ashburton, Shire of	300	40
East Pilbara, Shire of	310	40
Karratha, City of	670	160
Port Hedland, Town of	390	100
Total Direct	1,660	350

South West Region

Local Government Area	Tourism Employment	Tourism Businesses
Augusta–Margaret River, Shire of	610	330
Boyup Brook, Shire of	20	10
Bridgetown-Greenbushes, Shire of	120	60
Bunbury, City of	890	560
Busseton, City of	1,310	540
Capel, Shire of	340	120
Collie, Shire of	230	90
Dardanup, Shire of	320	90
Donnybrook-Balingup, Shire of	120	80
Harvey, Shire of	510	190
Manjimup, Shire of	350	140
Nannup, Shire of	50	20
Total Direct	4,870	2,230

Wheatbelt Region

Local Government Area	Tourism Employment	Tourism Businesses
Beverley, Shire of	30	10
Brookton, Shire of	10	10
Bruce Rock, Shire of	10	20
Chittering, Shire of	90	40
Corrigin, Shire of	30	20
Cuballing, Shire of	20	10
Cunderdin, Shire of	20	20
Dalwallinu, Shire of	30	30
Dandaragan, Shire of	100	50
Dowerin, Shire of	10	10
Dumbleyung, Shire of	10	10
Gingin, Shire of	110	60
Goomalling, Shire of	20	10
Kellerberrin, Shire of	20	20
Kondinin, Shire of	40	20
Koorda, Shire of	10	-
Kulin, Shire of	10	10
Lake Grace, Shire of	20	40
Merredin, Shire of	80	40
Moora, Shire of	50	40
Mount Marshall, Shire of	10	-
Mukinbudin, Shire of	10	10
Narembeen, Shire of	10	10
Narrogin, Shire of	110	80
Northam, Shire of	240	110
Nungarin, Shire of	-	-
Pingelly, Shire of	20	10
Quairading, Shire of	20	10
Tammin, Shire of	10	-
Toodyay, Shire of	110	40
Trayning, Shire of	-	10
Victoria Plains, Shire of	30	10
Wagin, Shire of	30	30
Wandering, Shire of	-	10
West Arthur, Shire of	10	10
Westonia, Shire of	10	10
Wickepin, Shire of	10	10
Williams, Shire of	30	10
Wongan-Ballidu, Shire of	30	30
Wyalkatchem, Shire of	10	10
Yilgarn, Shire of	50	20
York, Shire of	90	40
Total Direct	1,530	930

NB: Rounded to tens. Totals may not add up due to rounding and unallocated tourism businesses.

Where no data is listed, an estimate is not possible due to small sample size or confidentiality of data.

Economic Development Services

Tourism Council WA has the tourism marketing and economic expertise to assist the development of your local tourism economy. Tourism Council WA provides a range of development services:



Tourism Statistics & Analysis

Latest tourism data for your local government area, region, destination or markets. Our data reports provide in-depth analysis for strategy development, grant applications, investment decisions and planning and performance measures.



Specialist Training Workshops

Tourism Council WA's range of specialist tourism training workshops provide practical assistance for businesses in your area. Our workshops are specifically tailored to tourism service and sales:



Tourism Consulting

Tourism Council WA provides leading consulting services on destination marketing strategies, feasibility studies, project reports and grant applications for your local government area, region, destination or market.



Tourism Ready

Ensure businesses in your region are ready for the tourism market via the Australian Tourism Accreditation Program and specialist accreditation such as China Ready & Accredited®. Accreditation provides international marketing for local businesses and your region.



Customer Service

Drive tourism business and revenue to your region through improved destination customer service and sales techniques.



Tourism Project Advocacy

Professional industry advocacy for funding, grants and approvals for significant tourism infrastructure and project proposals in your local government area, region, destination or market.



Public Policy

Best practice advice on public policy and regulatory approaches for your area, including practical assistance on identifying and prioritising key policy issues facing your region, local government area, destination or market.



Tourism Boost

Understand how tourism marketing, distribution and sales channels work for your business and local tourism industry.



International Markets and Online Distribution

Professional one-on-one mentoring to assist your local businesses grow tourism by expanding through new online distribution and international trade marketing channels. Businesses will be provided with tailored advice, a marketing strategy and an action plan to progress through new marketing channels.



eTourism Marketing

Critical to attracting and retaining customers and bookings, our series of eTourism workshops will develop your region's online presence and digital marketing channels.



China Ready

Develop your region and local businesses to be China Ready and understand the marketing channels to reach the rapidly growing China tourism market.





10. Glossary

Australian Bureau of Statistics (ABS) Census: The Census is the largest form of information gathering conducted in Australia, collecting a wide range of information about the Australian population. For the purposes of the *WA Tourism Work Atlas* the Census gathers critical details regarding usual place of residence, labour force participation and industry employed in.

Direct: The economic contribution and employment generated by transactions between visitors and producers of goods and services. For example, the economic contribution of visitor spending in hotels on sales, taxes, wages, salaries and services. The direct employment generated by tourism has been estimated for the State, Tourism Regions, State Electorates, Regional Development Commissions and Local Government Areas (see Methodology).

Indirect: The flow-on effects on the requirement for inputs for those producers who supply goods and services directly to visitors. For example, the fresh produce and electricity used by a hotel. The indirect employment generated by tourism has only been estimated at a state level and is therefore not available at a regional level.

Net taxes: The combined taxes or subsidies on a product, payable per unit of a good or service. These usually become payable when the product is sold or imported but may also become payable in other circumstances such as when a good is exported.

Total contribution: The total contribution of tourism taking into account direct and indirect effects (see direct contribution of tourism and indirect contribution of tourism).

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).

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 GVA. Direct and indirect flow-on GSP are measured separately using the TSA framework and I-O modelling techniques respectively. Combined they provide an estimate of total tourism GSP.

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 GVA are measured separately using the TSA framework and I-O modelling techniques respectively. Combined they provide an estimate of total tourism GVA.

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.

Tourism Satellite Account (TSA): The Tourism Satellite Accounts 2014-15 publication by Tourism Research Australia builds on the Australian Bureau of Statistics (ABS) National Tourism Satellite Account 2014-15 to produce a comprehensive set of data on the direct and indirect economic contribution of tourism for all states and territories.



11. Methodology

Primary Data Sources

- ABS - 2011 Census of Population and Housing (Industry of Employment)
- ABS - cat. 5249.0, Tourism Satellite Account 2014-15
- ABS - cat. 8165.0, Counts of Australian Businesses, Jun 2011 to Jun 2015
- ABS - Custom data – WA Industry, LGA and SA2 Tourism business counts for June 2015
- Tourism Research Australia - State Tourism Satellite Accounts 2014-15
- Electoral Boundaries WA - Enrolment by district, region, local government, locality, postcode and SA1 after 2015 final boundary changes.

Indicative Estimates

It is important to note that the figures contained in the *WA Tourism Work Atlas* should be regarded as indicative estimates rather than accurate to the last job or business. There are a number of aspects of the underlying data which will impact the estimates. Three important aspects are:

- Seasonality – for example, the ABS Census is conducted in August and September, when some regions will be at their peak while others will be at seasonal lows.
- Place of residence – jobholders are counted at their place of residence rather than their place of work.
- Confidentiality – some data may have been randomly adjusted by the ABS to prevent the release of confidential information.

Tourism Employment Estimates

To estimate tourism employment:

1. The State Tourism Satellite Account (TSA) is used to obtain a benchmark estimate of tourism employment by industry for Western Australia.
2. The TSA estimate of employment was then distributed across the state's Commonwealth Electoral Districts (CEDs) using ABS 2011 Census data on employment by industry in each CED, adjusted with a location quotient to reflect the changes in the relative contribution of tourism expenditure from that CED.
3. The ABS 2011 Census data on employment by industry at Statistical Areas 2 (SA2) level is corresponded to State Electorates and Tourism Regions to determine each location's share of employment for each industry. These shares are then applied to the TSA employment benchmark by industry to calculate a tourism employment estimate for each location.
4. The ABS 2011 Census data on share of employment by industry at Local Government Areas (LGA) level are then applied to the TSA employment benchmark by industry to calculate a tourism employment estimate for each LGA. The LGA estimates are combined in each of their corresponding Regional Development Commission (RDC) areas to calculate a tourism employment estimate for each RDC.

Tourism Business Counts

The ABS provided business counts of tourism businesses in 2014-15 on an Industry, CED, SA2 and LGA level.

Correspondences

Correspondences, from Electoral Boundaries WA, between State Electorate, SA2s and LGAs were used to adjust for the 2015 State Electorate boundary and name changes. ABS correspondences between Tourism Regions and Statistical Area 2 (SA2) geographies were also utilised.

Research Sponsors

Tourism Council WA also thanks Perth Airport, Crown Perth and the WA Local Government Association for their financial contribution to the research underpinning this report.







Tourism Council WA: 1 Resort Drive, Burswood WA 6100 | PO Box 91, Burswood WA 6100
Phone: (08) 9416 0700 | Fax: (08) 9472 0111 | tcwa@tourismcouncilwa.com.au | www.tourismcouncilwa.com.au