



# NEW SOUTH WALES TOURISM BUSINESS COUNT & EMPLOYMENT ATLAS

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# Foreword

Tourism & Transport Forum (TTF) is proud to present the New South Wales edition of our popular and respected tourism employment atlas to help inform decision makers, business leaders and the community about the value of tourism to the New South Wales economy. In addition to its current contribution, tourism has been identified as a 'super-growth' industry that can provide future job and business opportunities across the state and help to deliver prosperity around Australia.

The *New South Wales Tourism Business Count and Employment Atlas* (the *Atlas*) provides information about tourism-related businesses and tourism employment in all New South Wales electorates. We hope the *Atlas* will help to reinforce the importance of tourism and the visitor economy to every part of the state.



**Margy Osmond**  
Chief Executive Officer

## Tourism employment estimates

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.

In 2012-13, this showed that tourism was responsible for 158,000 jobs across New South Wales. There were also another 109,000 indirect jobs supported by tourism.<sup>2</sup>

Tourism employment extends far beyond travel agents and those who work in hotels. It includes chefs and cooks, transport workers from pilots to taxi drivers, tour guides and those who provide services to visitors across the state's cultural, attraction and entertainment offerings and in our retail stores.

**Tourism creates 158,000 direct jobs in the state and supports another 109,000 indirect jobs.**

This New South Wales edition of the *Atlas* also highlights the significant number of businesses that provide products and services for the visitor economy and depend on its continuing strength. There were approximately 91,000 tourism businesses in New South Wales as at June 2013 across both tourism characteristic and tourism connected industries.<sup>3</sup> Combined, these represent more than 13% of all businesses in New South Wales.<sup>4</sup>

**Every New South Wales household would pay \$1,183 more in taxes without the tax revenue generated by tourism.**

While the importance of tourism may seem obvious to those who live and work near some of New South Wales' tourism drawcards, such as the Sydney Opera House, Blue Mountains and major events destinations like ANZ Stadium, the reality is that tourism is a key sector for many cities and regional areas across the state, given the breadth and depth of our tourism offering. The *Atlas* seeks to highlight tourism's overall contribution to business activity and employment in each state electorate to ensure that the significance of the visitor economy is better understood by decision makers and the broader community.

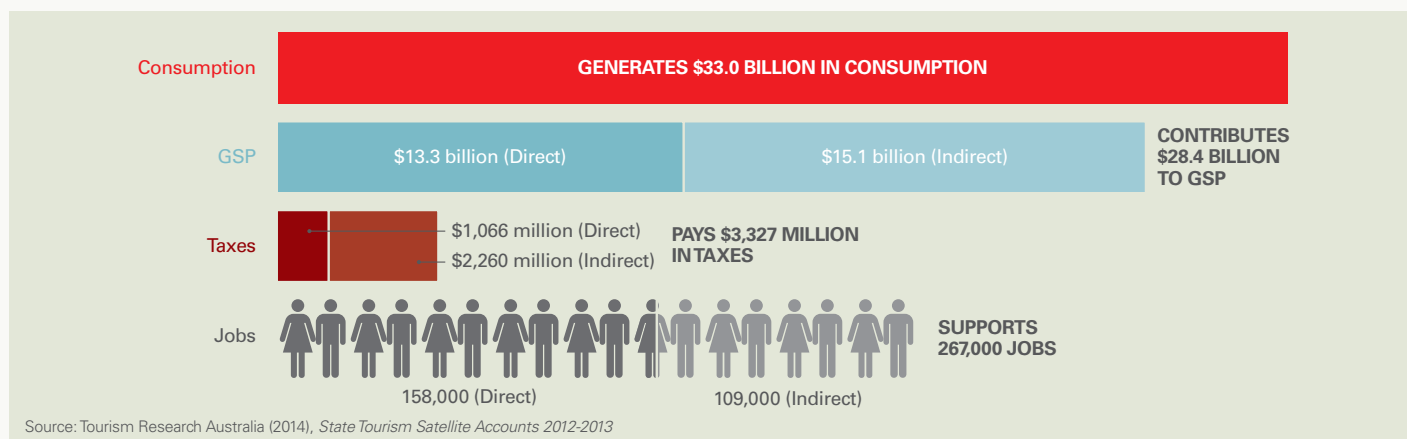
## Tourism Snapshot

Tourism is a critical economic driver for New South Wales, generating \$33 billion in overall expenditure for the state. Tourism contributed \$28.4 billion in gross state product (GSP) in 2012-13, including \$13.3 billion in direct GSP and another \$15.1 billion in flow-on indirect GSP, a 6% share of the New South Wales economy.<sup>1</sup>

A common perception is that tourism is just leisure travel – people on holidays or visiting friends and family. Yet the reality is that people travel to and around New South Wales for many reasons, including education, business, to attend conferences, conventions or exhibitions, working holidays and more. All of these travellers contribute to the visitor economy, creating employment and business opportunities across New South Wales.

**Domestic and international visitors spend an average of \$75 million in New South Wales every day.**

**Figure 1 New South Wales visitor economy impact**



Source: Tourism Research Australia (2014), *State Tourism Satellite Accounts 2012-2013*

1 Tourism Satellite Account 2012-13, Australian Bureau of Statistics, cat. no. 5249.0 and State Tourism Satellite Accounts 2012-13, Tourism Research Australia

2 *ibid.*

3 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, while 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

4 Counts of Australian Businesses, Australian Bureau of Statistics, June 2014



# New South Wales Tourism Business Count & Employment Atlas

TTF's *Atlas* seeks to build on the national data available from the Australian Bureau of Statistics and Tourism Research Australia to provide estimates for each of New South Wales' 93 Legislative Assembly seats.

## Tourism employment

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

Figure 2 Direct tourism employment in New South Wales

Industry	Tourism employment
Accommodation	20,900
Cafes, restaurants and takeaway food services	41,000
Clubs, pubs, taverns and bars	9,200
Rail transport	1,400
Road transport and transport equipment rental	5,500
Air, water and other transport	9,300
Travel agency and tour operator services	10,400
Cultural services	3,400
Casinos and other gambling services	700
Other sports and recreation services	5,500
Retail trade	32,200
Education and training	11,400
All other industries	7,700
Total	158,600

NB: Ranked by tourism intensity. Rounded to hundreds.

While nearly 65 per cent of New South Wales' tourism jobs are in greater metropolitan Sydney – spanning the coastline to the Blue Mountains and Wyong to the Royal National Park – the importance of tourism employment to regional areas should not be underestimated.



The *Atlas* reveals that there are a number of areas where tourism employment represents a greater than average proportion of total employment, with Sydney Airport a clear driver of jobs for its surrounding electorates. The seven electorates with the highest proportion of tourism employment are listed in Figure 3 below – three in metropolitan Sydney, four in regional areas.

Figure 3 Electorates with the highest intensity of tourism employment

Rank	Electorate	Tourism employment	% of total employment
1	Bega	1,900	7.3%
2	Tweed	1,900	7.3%
3	Rockdale	3,200	7.2%
4	Ballina	2,100	7.1%
5	Sydney	3,600	7.1%
6	Coffs Harbour	1,900	6.8%
7	Kogarah	2,400	6.5%
NSW Total		158,600	5.1%

NB: Ranked by tourism intensity. Rounded to hundreds.





**Figure 4 Tourism-related businesses in New South Wales**

Industry	Tourism businesses
Accommodation	4,030
Air, water and other transport	1,410
Automotive fuel retailing	1,410
Cafes, restaurants and takeaway food services	19,580
Casinos and other gambling activities	400
Cultural services	5,530
Motor vehicle hiring	440
Other retail trade	42,690
Other sports and recreation activities	3,190
Pubs, taverns and bars	3,110
Rail transport	60
Taxi and other road transport	6,280
Travel agency and tour operator services	1,880
<b>Total</b>	<b>91,000</b>

NB: Listed alphabetically. Rounded to tens. Industries do not sum to total due to data confidentiality.

## Tourism businesses

The *Atlas* also includes a count of businesses involved in the visitor economy, which clearly shows the importance of tourism across all electorates in the state. Across New South Wales there were approximately 91,000 tourism businesses as at June 2014, representing more than 13% of all businesses.

Tourism businesses fall into two categories: “tourism characteristic” (those with a high reliance on tourism activity) – and “tourism connected” (e.g. automotive fuel retailing and other retail trade), with each category accounting for about half of all tourism businesses.

## Methodology

The methodology used in the *Atlas* has changed since earlier editions were produced.

In preparing the *Atlas*, TTF has defined a streamlined methodology to minimise the adjustments made to the underlying data. Improvements in the data available from the Australian Bureau of Statistics (ABS) and modelled expenditure at the tourism region level by Tourism Research Australia (TRA) have enabled the development of a more straightforward process than in earlier versions of the *Atlas*.

It is important to note that these figures should be regarded as indicative estimates rather than accurate to the last job. There are a number of aspects of the underlying data which will impact the estimates. Two important aspects are:

- seasonality – for example, the Census is conducted in August, when some regions will be at their peak while others will be at seasonal lows; and
- place of residence – jobholders are counted at their place of residence rather than their place of work.

To estimate tourism employment at the state district and region level:

- 1 The state TSAs are used to obtain a benchmark estimate of tourism employment by industry for the state.
- 2 The ABS’ 2011 Census industry of employment data at Statistical Areas 2 (SA2) level is corresponded to ABS State Electoral Districts to determine each electorate’s share of employment for each tourism-related industry.

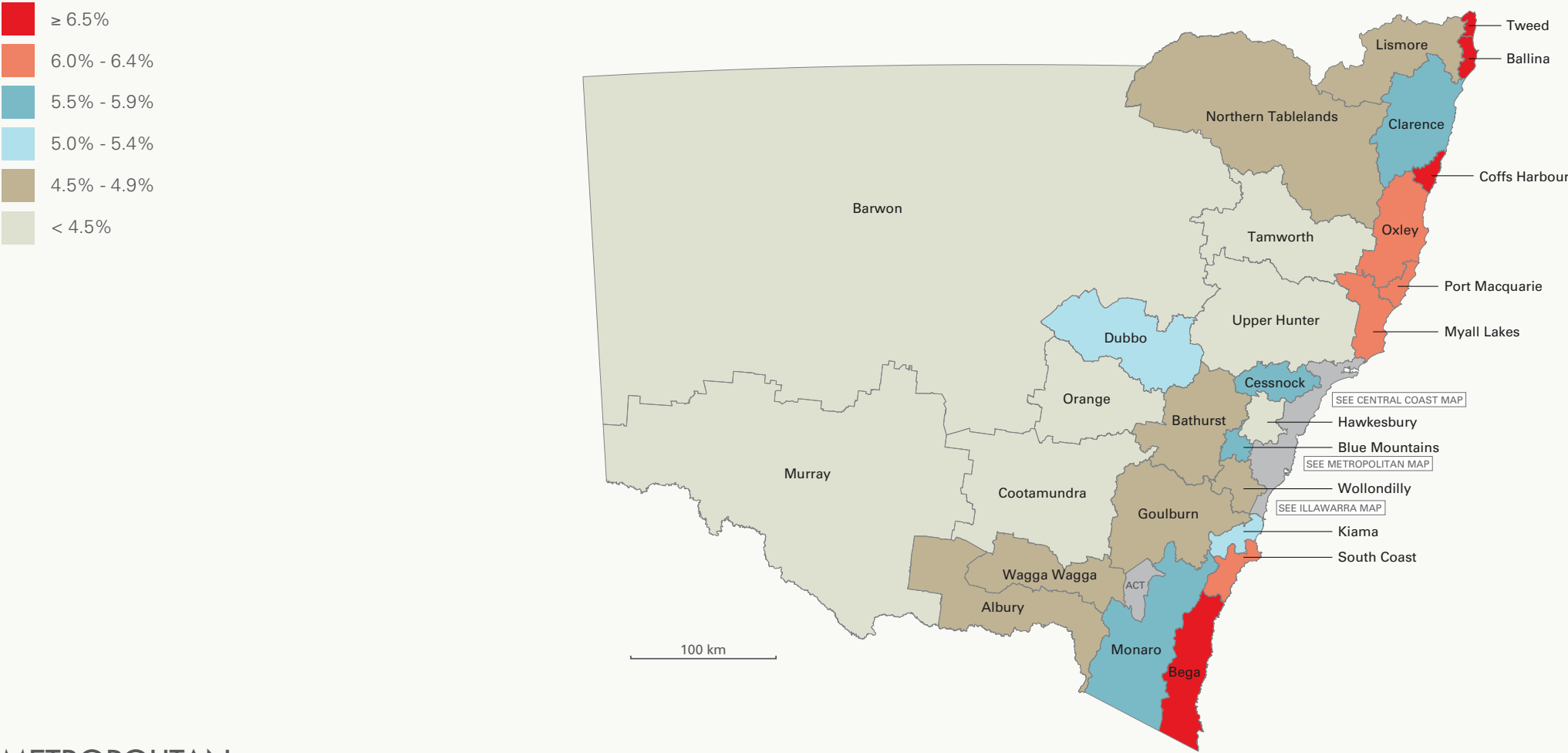
a. These shares are then applied to the TSA employment benchmark to calculate an initial employment estimate by industry type for individual districts.

- 3 Recognising that tourism is more or less important as an employment generator in different areas of the state because of tourism patterns and overall industry size and mix, a localised tourism intensity ratio (TIR) is used to refine individual state district employment estimates.
  - a. The national TIR used by the ABS in the TSA is used as the starting point for this adjustment.
  - b. The localised TIRs are based on TRA’s estimates of tourism expenditure against total output for Australia’s Tourism Regions. The result provides an independent proxy of tourism importance for each Tourism Region based on the variation above or below the national average.
- 4 ABS correspondences between Tourism Regions, SA2 geographies and the ABS State Electoral Division geographies are used to allocate the TIR location quotients for the Tourism Regions to individual state electorates. The localised TIRs were allocated to direct correlating SA2s which in turn were averaged for correlating state districts.
- 5 These state district TIRs were then applied to the initial estimates of employment by tourism-related industry within the state districts to produce final adjusted employment estimates.

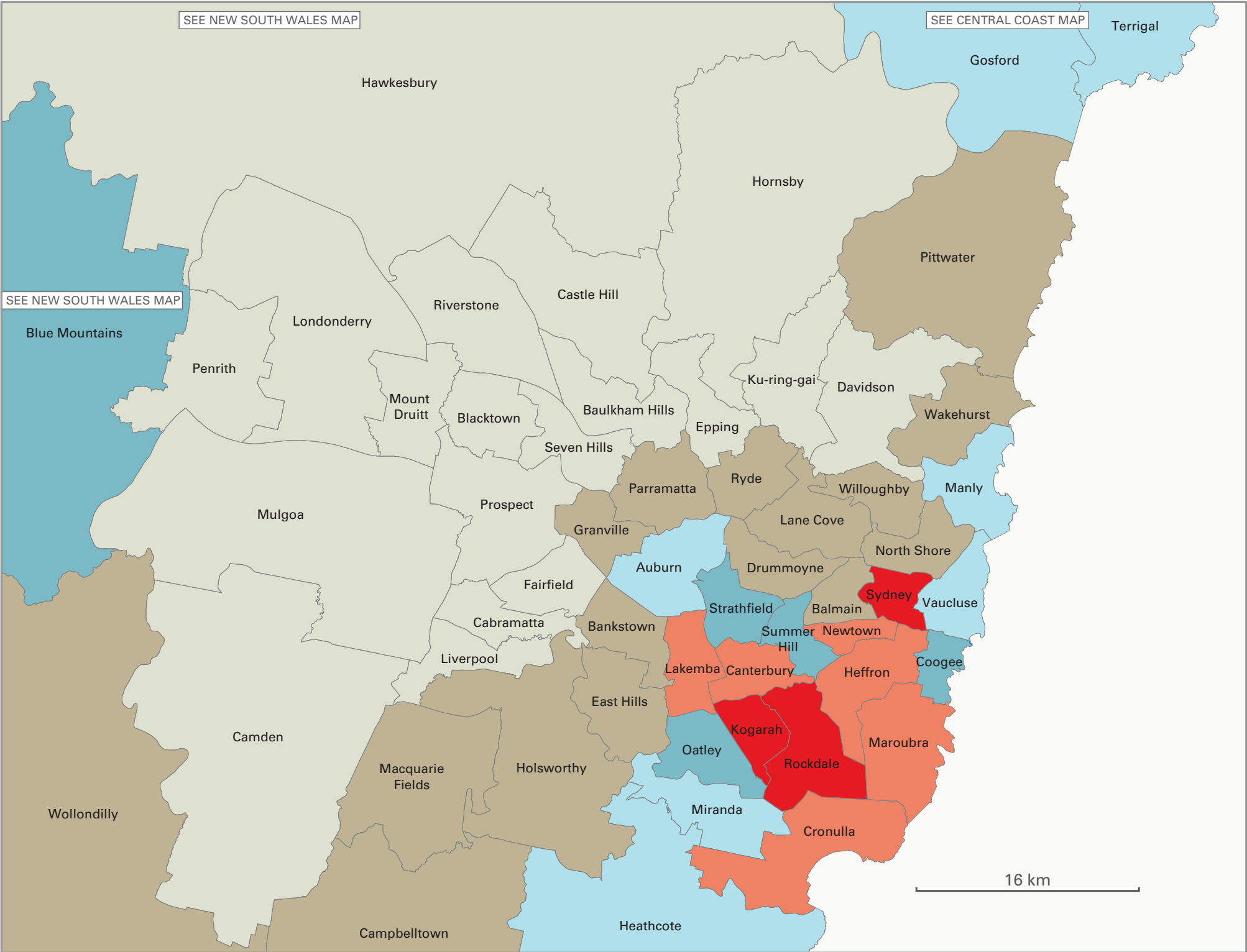


# New South Wales Tourism Employment Atlas

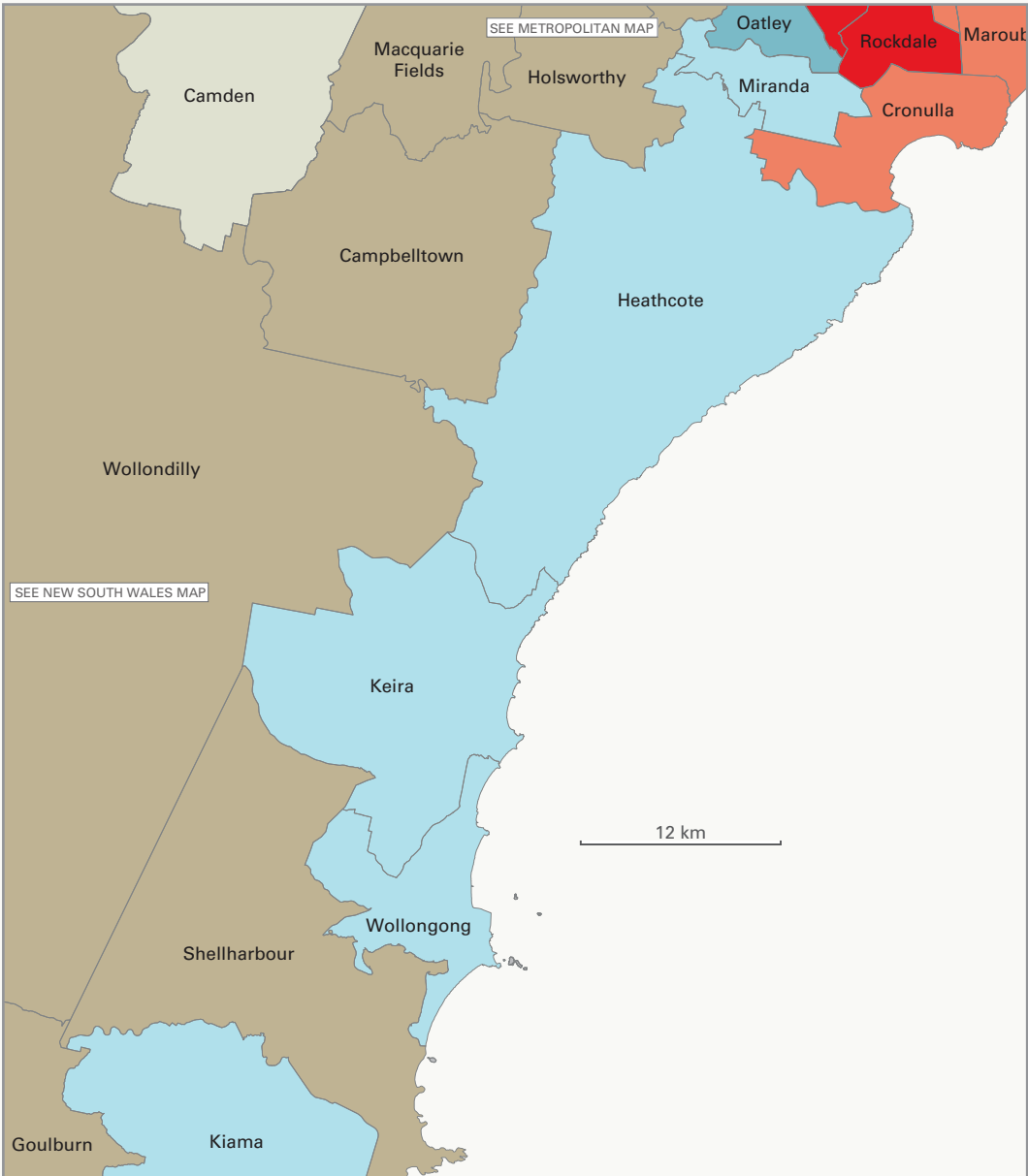
## ELECTORAL DISTRICTS



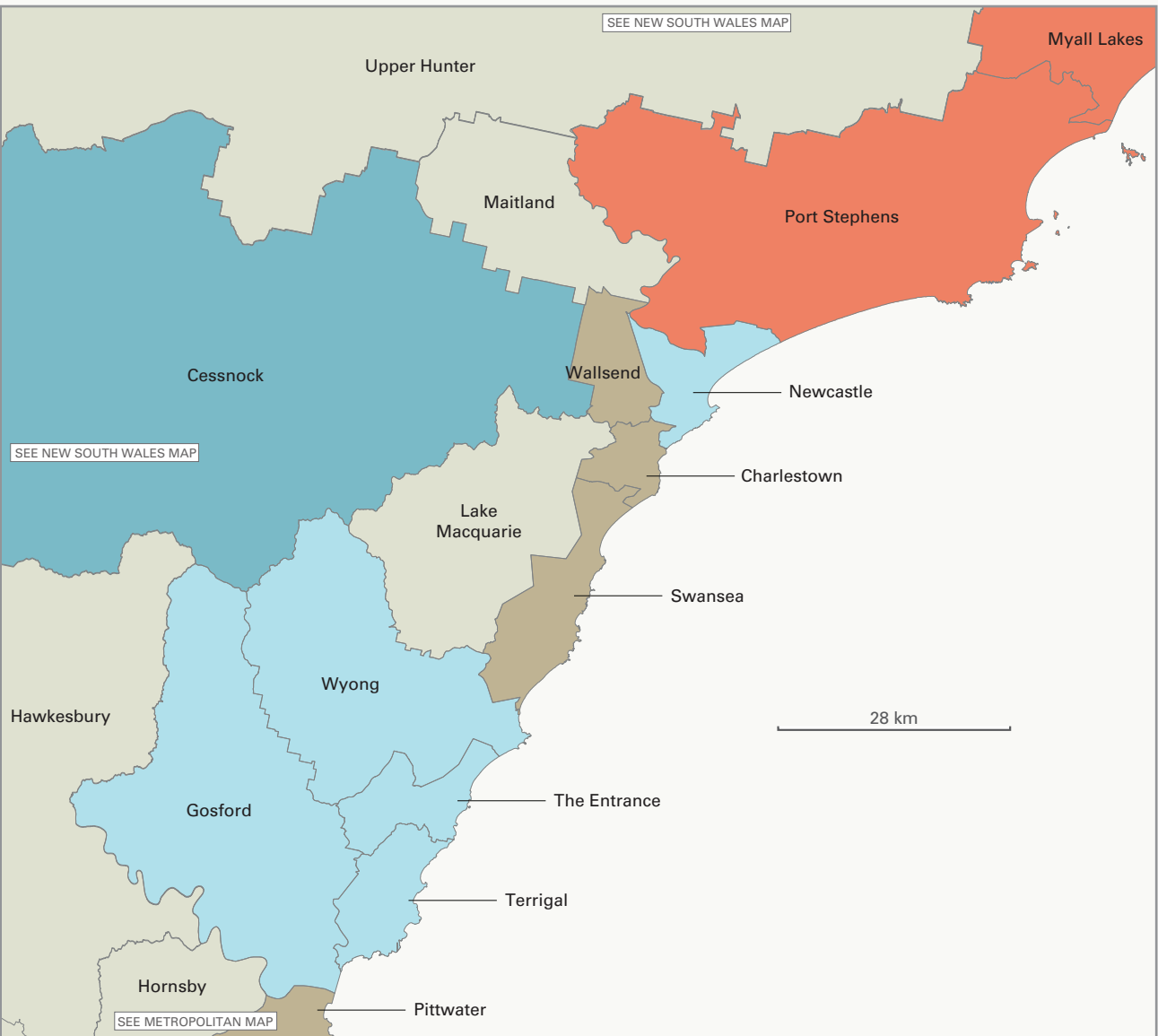
## METROPOLITAN



## ILLAWARRA



## CENTRAL COAST



**Figure 5** Tourism employment in New South Wales by electorates

District	Tourism employment	% District employment
Albury	1,600	4.8%
Auburn	1,900	5.4%
Ballina	2,100	7.1%
Balmain	1,900	4.7%
Bankstown	1,500	4.8%
Barwon	1,400	4.4%
Bathurst	1,500	4.8%
Baulkham Hills	1,200	4.2%
Bega	1,900	7.3%
Blacktown	1,500	4.4%
Blue Mountains	1,500	5.7%
Cabramatta	1,100	4.3%
Camden	1,400	4.1%
Campbelltown	1,100	4.7%
Canterbury	2,000	6.1%
Castle Hill	1,600	4.2%
Cessnock	1,500	5.6%
Charlestown	2,300	4.5%
Clarence	1,300	5.7%
Coffs Harbour	1,900	6.8%
Coogee	1,700	5.5%
Cootamundra	1,000	4.2%
Cronulla	2,400	6.2%
Davidson	1,700	4.3%
Drummoyne	1,400	4.8%
Dubbo	1,700	5.0%
East Hills	1,400	4.8%
Epping	1,000	4.4%
Fairfield	1,500	4.4%
Gosford	1,500	5.3%
Goulburn	1,700	4.7%
Granville	1,300	4.7%
Hawkesbury	1,700	4.1%
Heathcote	1,200	5.2%
Heffron	3,800	6.3%
Holsworthy	2,100	4.6%
Hornsby	1,200	4.2%
Keira	1,900	5.0%
Kiama	1,600	5.4%
Kogarah	2,400	6.5%
Ku-ring-gai	1,900	4.1%
Lake Macquarie	1,400	4.2%
Lakemba	1,700	6.1%
Lane Cove	2,500	4.5%
Lismore	1,600	4.7%
Liverpool	1,500	4.3%
Londonderry	1,400	4.2%
Macquarie Fields	1,900	4.6%
Maitland	1,500	4.4%
Manly	2,700	5.1%
Maroubra	1,900	6.1%
Miranda	2,300	5.4%
Monaro	2,100	5.7%
Mount Druitt	1,200	4.4%
Mulgoa	1,200	4.0%
Murray	1,600	4.4%
Myall Lakes	1,400	6.3%
Newcastle	1,800	5.0%
Newtown	2,000	6.3%
North Shore	1,900	4.7%
Northern Tablelands	1,500	4.5%
Oatley	1,600	5.6%
Orange	1,400	4.0%
Oxley	1,500	6.0%
Parramatta	2,400	4.7%
Penrith	1,900	4.1%
Pittwater	2,000	4.8%
Port Macquarie	1,700	6.2%
Port Stephens	1,700	6.3%
Prospect	1,100	4.1%
Riverstone	1,500	4.0%
Rockdale	3,200	7.2%
Ryde	1,200	4.8%
Seven Hills	1,900	4.1%
Shellharbour	1,500	4.9%
South Coast	1,400	6.2%
Strathfield	2,600	5.8%
Summer Hill	2,800	5.6%
Swansea	1,100	4.9%
Sydney	3,600	7.1%
Tamworth	1,600	4.4%
Terrigal	2,000	5.2%
The Entrance	1,500	5.2%
Tweed	1,900	7.3%
Upper Hunter	1,100	4.0%
Vaughan	1,700	5.1%
Wagga Wagga	1,700	4.8%
Wakehurst	1,300	4.7%
Wallsend	800	4.7%
Willoughby	1,300	4.6%
Wollondilly	1,400	4.5%
Wollongong	1,500	5.4%
Wyong	1,300	5.2%
<b>Total</b>	<b>158,600</b>	<b>5.1%</b>

NB: Ranked alphabetically. Rounded to hundreds.

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