



QUEENSLAND TOURISM BUSINESS COUNT & EMPLOYMENT ATLAS

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Foreword

Tourism & Transport Forum (TTF) is proud to present the Queensland 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 Queensland 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 Queensland Tourism Business Count and Employment Atlas (the *Atlas*) provides information about tourism-related businesses and tourism employment in all Queensland 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 Snapshot

Tourism is a critical economic driver for Queensland, generating \$27.8 billion in overall expenditure for the state. Tourism contributed \$23 billion in gross state product (GSP) in 2012-13, including \$10.9 billion in direct GSP and another \$12 billion in flow-on indirect GSP, a 7.9% share of the Queensland economy.¹

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 Queensland 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 Queensland.

Domestic and international visitors spend an average of \$61 million in Queensland every day.

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 140,000 jobs across Queensland. There were also another 101,000 indirect jobs supported by tourism.²

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.

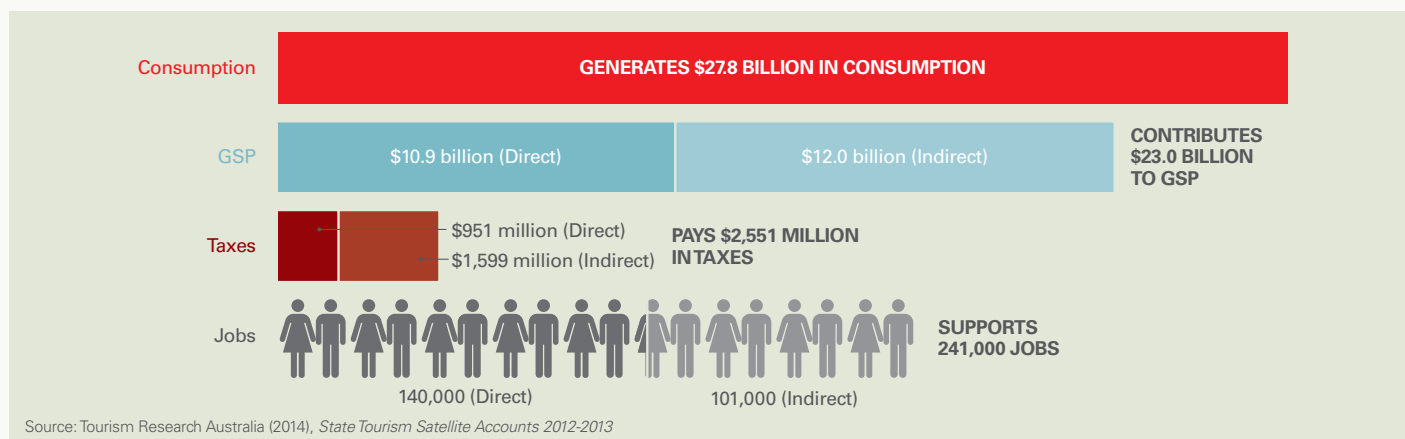
Tourism creates 140,000 direct jobs in the state and supports another 101,000 indirect jobs.

This Queensland 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 51,000 tourism businesses in Queensland as at June 2013 across both tourism characteristic and tourism connected industries. Combined, these represent more than 12% of all businesses in Queensland.³

Every Queensland household would pay \$1,427 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 Queensland's tourism drawcards, such as the Great Barrier Reef, the Gold Coast's theme parks and Brisbane's cultural centres, 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.

Figure 1 Queensland 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. Counts of Australian Businesses, Australian Bureau of Statistics, June 2014

NOTE: 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

Queensland Tourism Business Count & Employment Atlas

Tourism is unique among industries as its output is determined by consumption spending – in this case, visitor spending. Measuring tourism spending requires identifying visitors and their expenditure patterns.

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 Queensland’s 89 Legislative Assembly seats.

Tourism employment

Tourism is a key contributor to employment in Queensland, 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.

Figure 2 Tourism employment in Queensland

Industry	Tourism employment
Accommodation	18,200
Cafes, restaurants and takeaway food services	36,700
Clubs, pubs, taverns and bars	8,200
Rail transport	1,000
Road transport and transport equipment rental	6,000
Air, water and other transport	10,500
Travel agency and tour operator services	10,100
Cultural services	2,600
Casinos and other gambling services	1,100
Other sports and recreation services	6,600
Retail trade	25,000
Education and training	8,200
All other industries	6,000
Total	140,100

NB: Ranked by tourism intensity. Rounded to hundreds.



While almost 60% of Queensland’s tourism jobs are in the Brisbane and Gold Coast metropolitan areas, the importance of government support 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. The eight electorates with the highest proportion of tourism employment are listed in Figure 3 below – three on the Gold Coast and five in regional areas.

Figure 3 Electorates with the highest intensity of tourism employment

Rank	Electorate	Tourism employment	% of total employment
1	Cairns	3,600	13.8%
2	Surfers Paradise	3,200	12.7%
3	Barron River	3,500	12.2%
4	Noosa	2,200	11.1%
5	Cook	2,200	11.0%
6	Mermaid Beach	2,600	10.7%
7	Southport	2,600	10.7%
8	Maroochydore	2,200	10.0%
Total		140,100	6.9%

NB: Ranked by tourism intensity. Rounded to hundreds.





Figure 4 Tourism-related businesses in Queensland

Industry	Tourism businesses
Accommodation	3,090
Air, water and other transport	1,240
Automotive fuel retailing	780
Cafes, restaurants and takeaway food services	10,400
Casinos and other gambling activities	270
Cultural services	2,230
Motor vehicle hiring	380
Other retail trade	24,750
Other sports and recreation activities	2,290
Pubs, taverns and bars	1,620
Rail transport	20
Taxi and other road transport	2,960
Travel agency and tour operator services	990
Total	51,020

NB: Ranked alphabetically. Rounded to tens.

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 Queensland there were approximately 51,000 tourism businesses as at June 2013, representing more than 12% of all businesses.

Tourism businesses fall into two categories: tourism characteristic and tourism connected businesses, with each category accounting for about half of all tourism businesses. The mix of businesses varies across regions, with regional areas more likely to have a greater concentration of 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*.

Due to these changes, along with related changes to the underlying methodology of the Tourism Satellite Account (TSA), comparisons to previous editions should not be made.

It is important to note, however, 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.

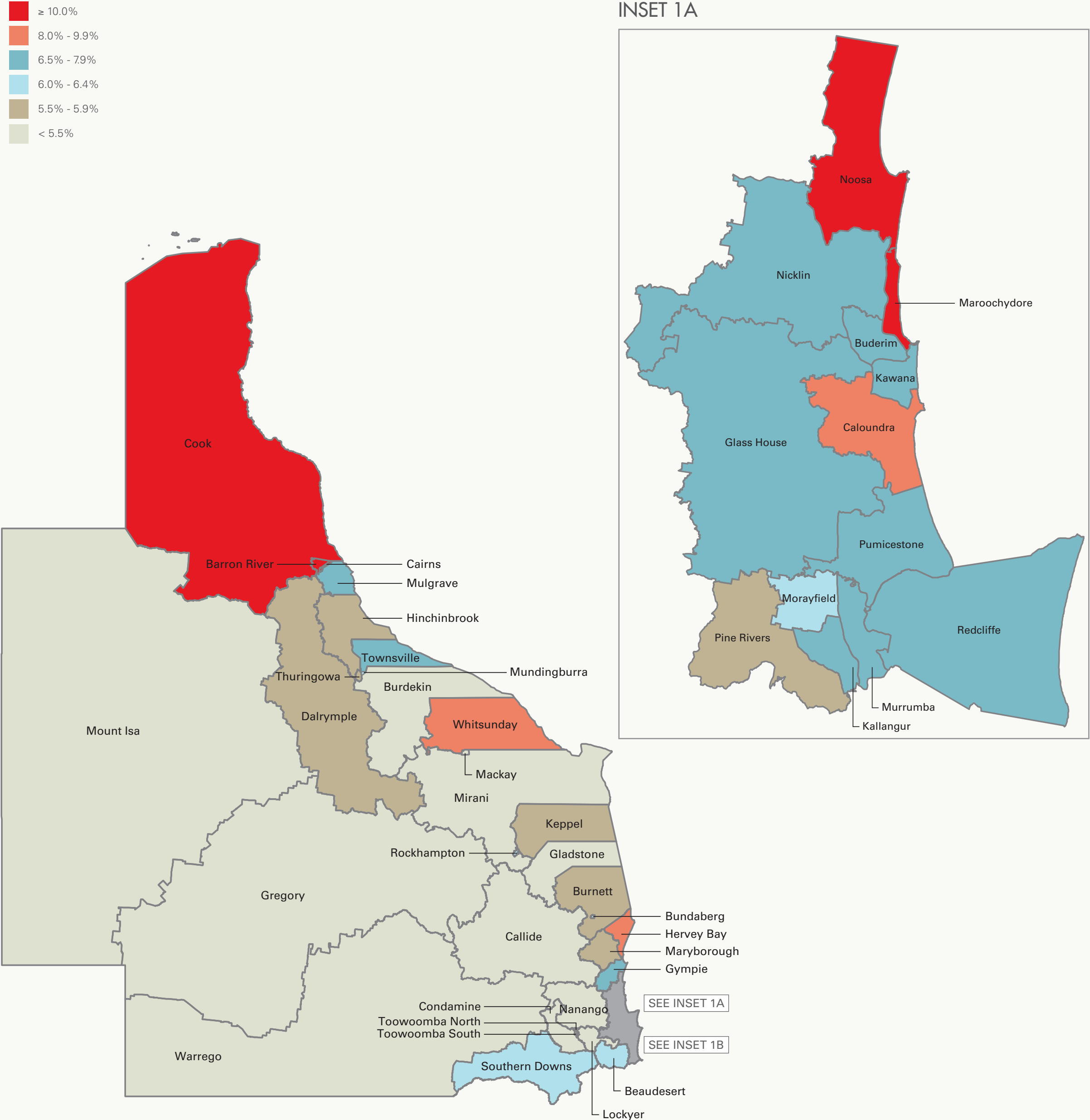
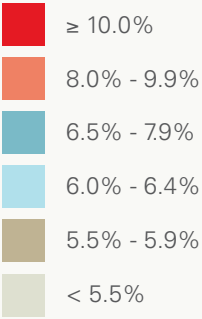
To estimate tourism employment at the state district and region level:

- 1 The state TSAs are used to obtain a benchmark estimate of tourism employment by industry for the state.

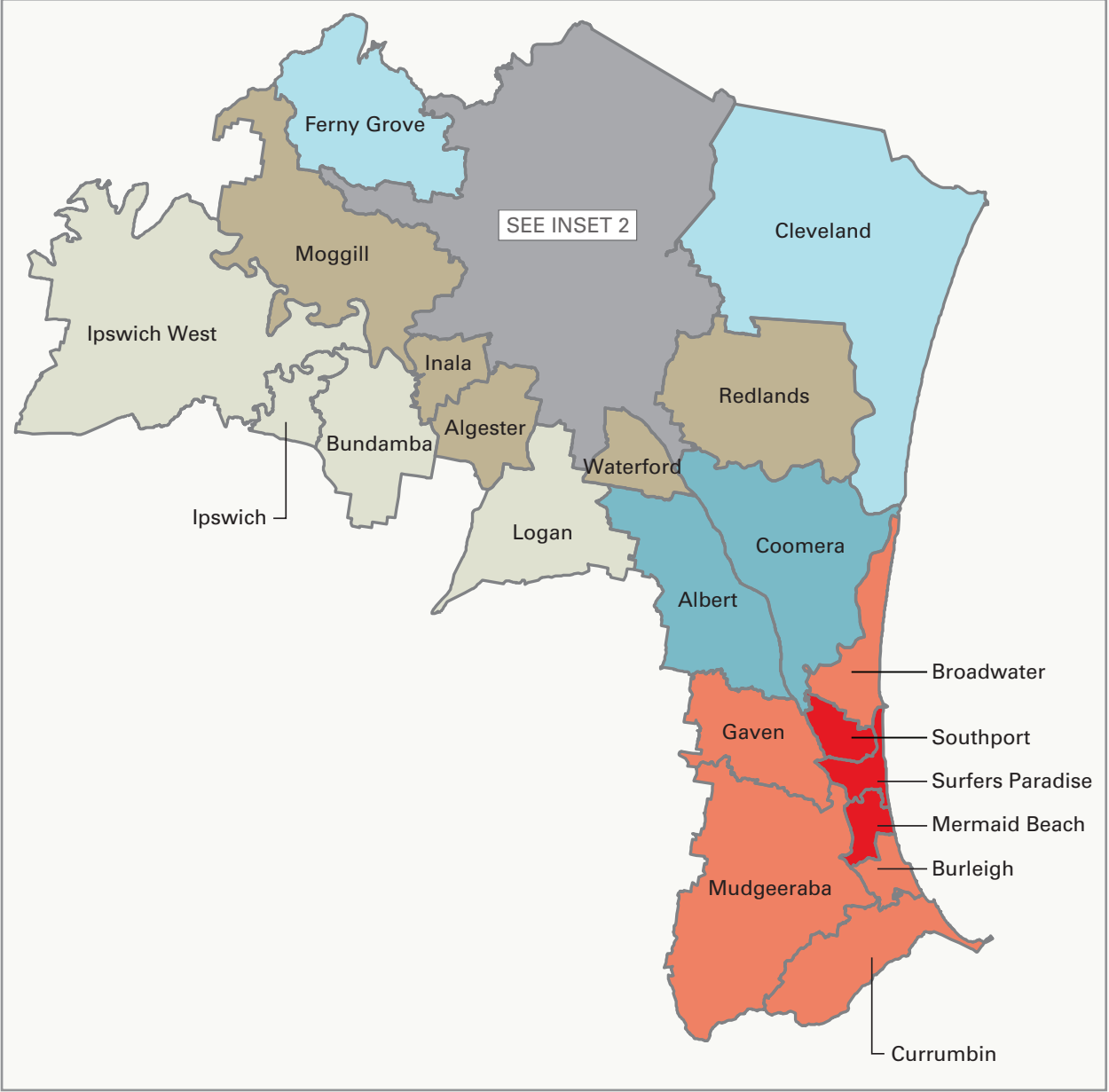
- 2 The ABS' 2011 Census industry of employment data at Statistical Areas 2 (SA2) level is corresponded to ABS State Electoral Districts to determine each electorate's share of employment for each tourism-related industry.
 - a. These shares are then applied to the TSA employment benchmark to calculate 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.

Queensland Tourism Employment Atlas

ELECTORAL DISTRICTS



INSET 1B



INSET 2

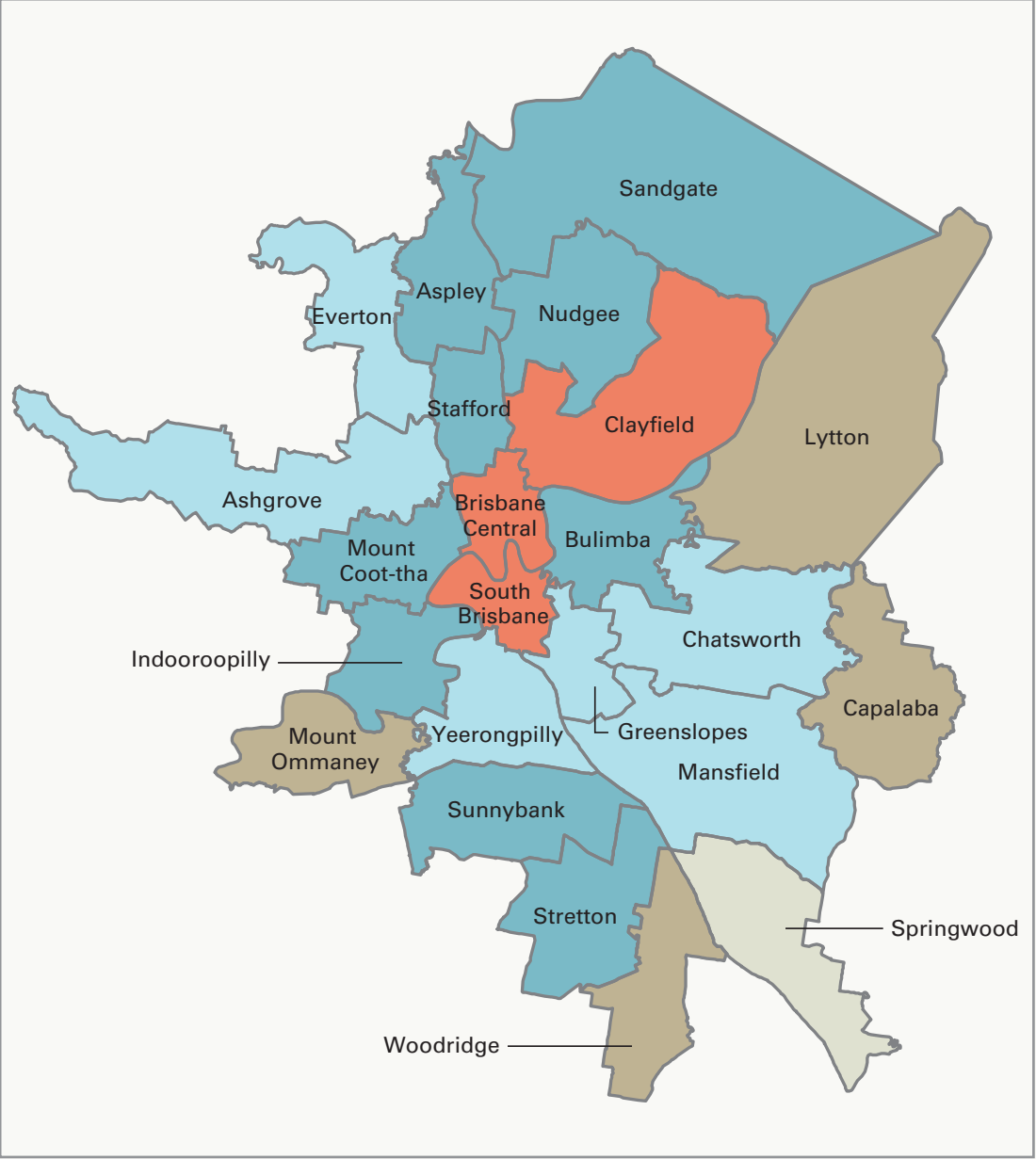


Figure 5 Tourism employment in Queensland by electorates

District	Tourism employment	% Electorate employment
Albert	2,000	7.1%
Algeria	1,500	5.7%
Ashgrove	1,500	6.0%
Aspley	1,400	6.5%
Barron River	3,500	12.2%
Beaudesert	1,500	6.4%
Brisbane Central	2,600	8.7%
Broadwater	1,900	9.5%
Buderim	1,500	7.5%
Bulimba	1,800	6.5%
Bundaberg	1,000	6.3%
Bundamba	1,400	5.0%
Burdekin	1,100	5.2%
Burleigh	2,300	9.9%
Burnett	1,000	5.8%
Cairns	3,600	13.8%
Callide	900	4.5%
Caloundra	1,500	8.2%
Capalaba	1,400	5.6%
Chatsworth	1,500	6.0%
Clayfield	2,200	8.3%
Cleveland	1,500	6.3%
Condamine	1,200	4.7%
Cook	2,200	11.0%
Coomera	1,900	7.2%
Currumbin	1,900	9.2%
Dalrymple	1,200	5.8%
Everton	1,500	6.2%
Ferny Grove	1,400	6.1%
Gaven	2,200	8.4%
Gladstone	1,300	4.9%
Glass House	1,400	6.5%
Greenslopes	1,400	6.0%
Gregory	1,100	5.0%
Gympie	1,200	6.8%
Hervey Bay	1,400	9.0%
Hinchinbrook	1,200	5.5%
Inala	1,200	5.6%
Indooroopilly	1,500	6.6%
Ipswich	1,100	5.3%
Ipswich West	1,100	5.0%
Kallangur	1,400	6.0%
Kawana	1,600	7.9%
Keppel	1,400	5.8%
Lockyer	1,100	5.2%
Logan	1,100	5.0%
Lytton	1,300	5.6%
Mackay	1,300	5.4%
Mansfield	1,300	6.3%
Maroochy	2,200	10.0%
Maryborough	1,000	5.8%
Mermaid Beach	2,600	10.7%
Mirani	1,100	4.3%
Moggill	1,300	5.6%
Morayfield	1,400	6.2%
Mount Coot-tha	1,900	7.1%
Mount Isa	800	4.8%
Mount Ommaney	1,300	5.5%
Mudgeeraba	2,100	8.7%
Mulgrave	1,600	7.7%
Mundingburra	1,400	6.3%
Murrumba	1,600	6.2%
Nanango	900	4.7%
Nicklin	1,300	6.7%
Noosa	2,200	11.1%
Nudgee	2,000	7.7%
Pine Rivers	1,400	5.7%
Pumicestone	1,200	6.7%
Redcliffe	1,400	7.1%
Redlands	1,200	5.5%
Rockhampton	1,300	6.2%
Sandgate	1,500	6.6%
South Brisbane	2,200	8.1%
Southern Downs	1,300	6.0%
Southport	2,600	10.7%
Springwood	1,400	5.2%
Stafford	1,600	6.7%
Stretton	1,900	7.3%
Sunnybank	1,600	7.5%
Surfers Paradise	3,200	12.7%
Thuringowa	1,400	5.5%
Toowoomba North	1,200	5.5%
Toowoomba South	1,200	5.5%
Townsville	1,700	6.8%
Warrego	900	4.4%
Waterford	1,400	5.7%
Whitsunday	2,600	9.5%
Woodridge	1,300	5.9%
Yeerongpilly	1,500	6.3%
Total	140,100	6.9%

NB: Ranked alphabetically. Rounded to hundreds.

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