



# NATIONAL TOURISM BUSINESS COUNT & EMPLOYMENT ATLAS

**TTF**   
AUSTRALIA  
Tourism & Transport Forum

[www.ttf.org.au](http://www.ttf.org.au)



# Foreword

Tourism & Transport Forum (TTF) is pleased to present a new edition of our popular tourism employment atlas to help inform politicians, business leaders, decision makers and the community about the importance and significant reach of Australia's visitor economy. The National Tourism Business Count & Employment Atlas (the Atlas) provides information about tourism-related businesses and an estimate of tourism employment for each of the 150 federal electorates.

We hope that the Atlas will reinforce the importance of the visitor economy to the Australian economy.



**Margy Osmond**  
Chief Executive Officer

Tourism is a critical economic driver across Australia, generating \$121.2 billion in consumption in 2014/15. Tourism contributed \$97.6 billion to gross domestic product (GDP) in 2014-15, including \$47.5 billion in direct GDP and another \$50.1 billion in flow-on indirect GDP, a 6.1% share of the Australian 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 Australia for a variety of different reasons, including: education; employment; health; business; conferences, conventions and exhibitions; working holidays; and more. All of these travellers contribute to the visitor economy, creating employment and business opportunities across Australia.

The Australian Bureau of Statistics estimates direct tourism jobs through the Tourism Satellite Account. In 2014-15, this showed that tourism was responsible for 581,000 jobs across Australia. Tourism Research Australia provides further

information about indirect tourism jobs, estimating there were another 341,400 indirect jobs attributable to tourism.<sup>2</sup> In total, this represents 7.8% of all jobs in Australia. 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 service to visitors across our cultural, attraction and entertainment offerings and in our retail stores.

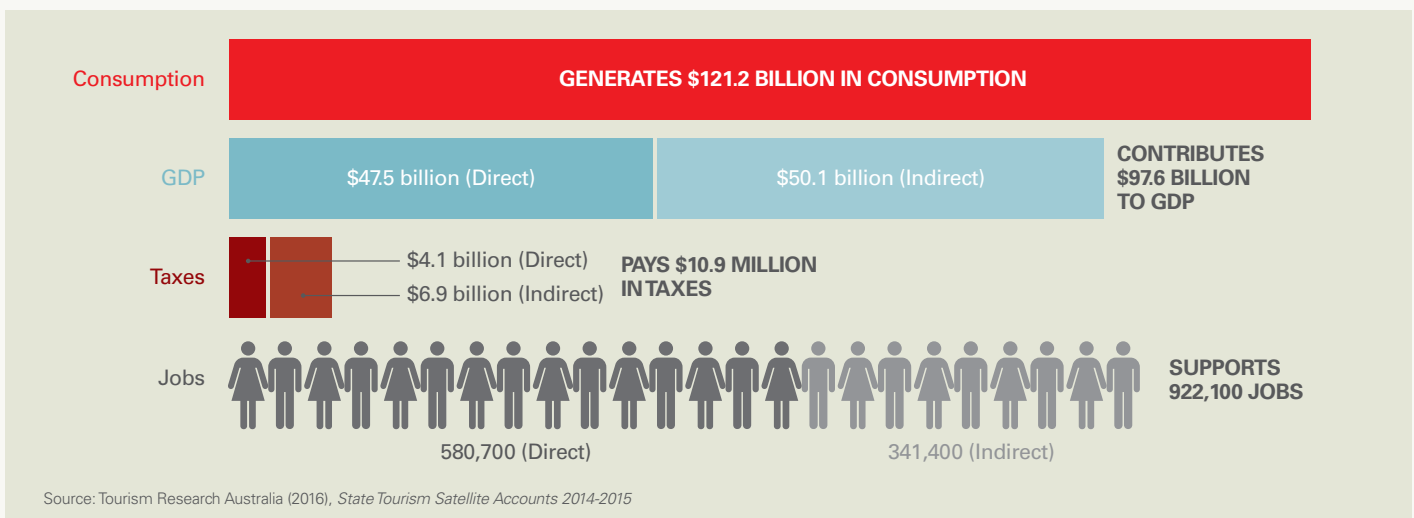
**Total tourism activity accounts for over 6% of Australian GDP and over 8% of Australian jobs.**

This edition of the Atlas builds on earlier versions, by also highlighting the significant number of businesses in each electorate which depend on the visitor economy. There were about 255,000 tourism businesses in Australia as of June 2015. This represents more than 12 per cent of the 2.1 million businesses in Australia.<sup>3</sup>

**12% of Australian businesses have links to the visitor economy.**

While the importance of tourism may seem obvious to those who live and work near some of Australia's tourism icons such as the Great Barrier Reef, Uluru and the Sydney Opera House, the reality is that tourism is a key sector for a great number of cities and towns across the country given the breadth and depth of our tourism offering. The National Tourism Business Count & Employment Atlas seeks to highlight tourism's overall contribution to business activity and employment in each federal electorate to ensure that the significance of the visitor economy is better understood by decision makers and the entire community.

**Figure 1 Australian visitor economy impacts**



1. ABS (2016) Tourism Satellite Account, 2014-15 cat. No. 5249.0 and TRA (2016) State Tourism Satellite Accounts 2014-15

2. Ibid

3. ABS (2016) Counts of Australian Businesses, unpublished data



## National Tourism Business Count & Employment Atlas

Tourism is unique among industries, as its output is determined by consumption spending – in this case, the spending of tourists and other visitors. Measuring tourism spending requires identifying visitors and their expenditure patterns. TTF's National Business Count & Employment Atlas seeks to build on the national data available from the Australian Bureau of Statistics and the state and territory data from Tourism Research Australia by providing estimates for each of the 150 federal electorates.

Our estimates are produced using a range of data, including:

- Australian Tourism Satellite Account 2014-15;
- State Tourism Satellite Accounts 2014-15; and
- Counts of Australian Businesses 2015, including unpublished data.

As with previous editions, it is important to note that the electorate level figures should be regarded as indicative estimates rather than accurate to the last job.

### Tourism employment

Tourism is a key contributor to employment in all states and territories, providing jobs across a broad set of related industries. Not surprisingly the number of jobs is highest in the accommodation, retail and restaurant industries, but tourism also contributes to employment in the transport, education and travel services industries.

**Figure 2 People employed in tourism, as of June 2015 ('000)**

| Tourism characteristic and connected industries       | NSW        | VIC        | QLD        | SA        | WA        | TAS       | NT       | ACT       | AUSTRALIA  |
|---|------------|------------|------------|-----------|-----------|-----------|----------|-----------|------------|
| Accommodation   | 26         | 20         | 21         | 4         | 11        | 3         | 1        | 2         | 88         |
| Cafes, restaurants and takeaway food services         | 45         | 38         | 35         | 9         | 18        | 6         | 2        | 3         | 156        |
| Clubs, pubs, taverns and bars                         | 10         | 8          | 7          | 2         | 4         | 1         | 0        | 1         | 33         |
| Rail transport  | 1          | 0          | 1          | 0         | 0         | 0         | 0        | 0         | 2          |
| Road transport and transport equipment rental         | 6          | 5          | 6          | 1         | 2         | 1         | 1        | 0         | 21         |
| Air, water and other transport                        | 10         | 8          | 11         | 3         | 4         | 1         | 1        | 0         | 38         |
| Travel agency and tour operator services              | 13         | 8          | 10         | 5         | 5         | 1         | 0        | 1         | 43         |
| Cultural services                                     | 4          | 3          | 2          | 0         | 1         | 1         | 0        | 0         | 11         |
| Casinos and other gambling services                   | 1          | 1          | 1          | 0         | 0         | 0         | 0        | 0         | 3          |
| Other sports and recreation services                  | 5          | 5          | 4          | 1         | 2         | 0         | 0        | 0         | 18         |
| Retail trade  | 32         | 23         | 23         | 7         | 10        | 3         | 2        | 2         | 100        |
| Education and training                                | 14         | 13         | 9          | 2         | 5         | 1         | 1        | 1         | 45         |
| Total tourism characteristic and connected industries | 165        | 132        | 130        | 34        | 61        | 17        | 8        | 10        | 557        |
| All other industries                                  | 7          | 5          | 5          | 2         | 3         | 0         | 0        | 1         | 23         |
| <b>Total tourism employment</b>                       | <b>172</b> | <b>137</b> | <b>135</b> | <b>36</b> | <b>64</b> | <b>18</b> | <b>9</b> | <b>10</b> | <b>581</b> |

Rows and columns may not add up due to rounding

## Tourism businesses

This edition of the Atlas also includes a count of businesses involved in the visitor economy, which clearly shows the importance of tourism across all federal electorates. Across Australia, there were approximately 255,000 tourism businesses as at June 2015, representing more than 12 per cent of all businesses in the country. Tourism businesses fall into two categories: tourism characteristic and tourism connected businesses, which generally each account for about half of all tourism businesses. The mix of businesses varies across regions, with regional and rural areas more likely to have a greater concentration of tourism businesses.

**Figure 3 Tourism-related businesses, as of June 2015**

| Tourism characteristic industries             | NSW           | VIC           | QLD           | SA            | WA            | TAS          | NT           | ACT          | AUSTRALIA      |
|---|---------------|---------------|---------------|---------------|---------------|--------------|--------------|--------------|----------------|
| Accommodation                                 | 3,700         | 2,740         | 2,850         | 685           | 1,030         | 466          | 152          | 78           | 11,701         |
| Cafes, restaurants and takeaway food services | 20,616        | 17,823        | 11,028        | 3,631         | 5,775         | 1,106        | 392          | 1,042        | 61,413         |
| Clubs, pubs, taverns and bars                 | 2,726         | 1,780         | 1,355         | 708           | 720           | 226          | 71           | 95           | 7,681          |
| Rail transport                                | 24            | 12            | 12            | 3             | 6             | 3            | 3            | 0            | 63             |
| Taxi transport                                | 6,142         | 3,790         | 2,759         | 827           | 1,618         | 222          | 108          | 205          | 15,671         |
| Air, water and other transport                | 1,156         | 769           | 1,014         | 237           | 566           | 125          | 99           | 20           | 3,986          |
| Motor vehicle hiring                          | 424           | 388           | 340           | 100           | 175           | 31           | 14           | 14           | 1,486          |
| Travel agency and tour operator services      | 1,978         | 1,331         | 993           | 247           | 373           | 86           | 59           | 46           | 5,113          |
| Cultural services                             | 5,299         | 4,015         | 1,984         | 640           | 1,065         | 224          | 82           | 196          | 13,505         |
| Casinos and other gambling services           | 327           | 471           | 173           | 80            | 163           | 27           | 10           | 8            | 1,259          |
| Other sports and recreation services          | 3,228         | 2,513         | 2,295         | 539           | 918           | 166          | 66           | 151          | 9,876          |
| Automotive fuel retailing                     | 1,384         | 889           | 712           | 208           | 285           | 133          | 38           | 19           | 3,668          |
| Other retail trade                            | 40,056        | 32,914        | 22,705        | 7,972         | 11,553        | 2,524        | 702          | 1,319        | 119,745        |
| <b>Total tourism related industries</b>       | <b>87,060</b> | <b>69,435</b> | <b>48,220</b> | <b>15,877</b> | <b>24,247</b> | <b>5,339</b> | <b>1,796</b> | <b>3,193</b> | <b>255,167</b> |



## Methodology

### Tourism Employment

To estimate tourism employment at the Commonwealth Electorate Divisions (CED) the state Tourism Satellite Accounts (TSA) were used to obtain a benchmark estimate of tourism employment by industry for each state and territory.

This estimate of employment was then distributed across relevant CEDs using 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 region to the corresponding total tourism expenditure in that state or territory over time.

ABS correspondences between Tourism Regions, Statistical Area 2 (SA2) geographies and the ABS Commonwealth Electoral Division geographies were used to adjust for the boundary and name changes in CEDs over time.

### Tourism Business Counts

The ABS provided business counts of tourism businesses in 2014-15 on a 2016 CED basis.

# National Tourism Employment Atlas

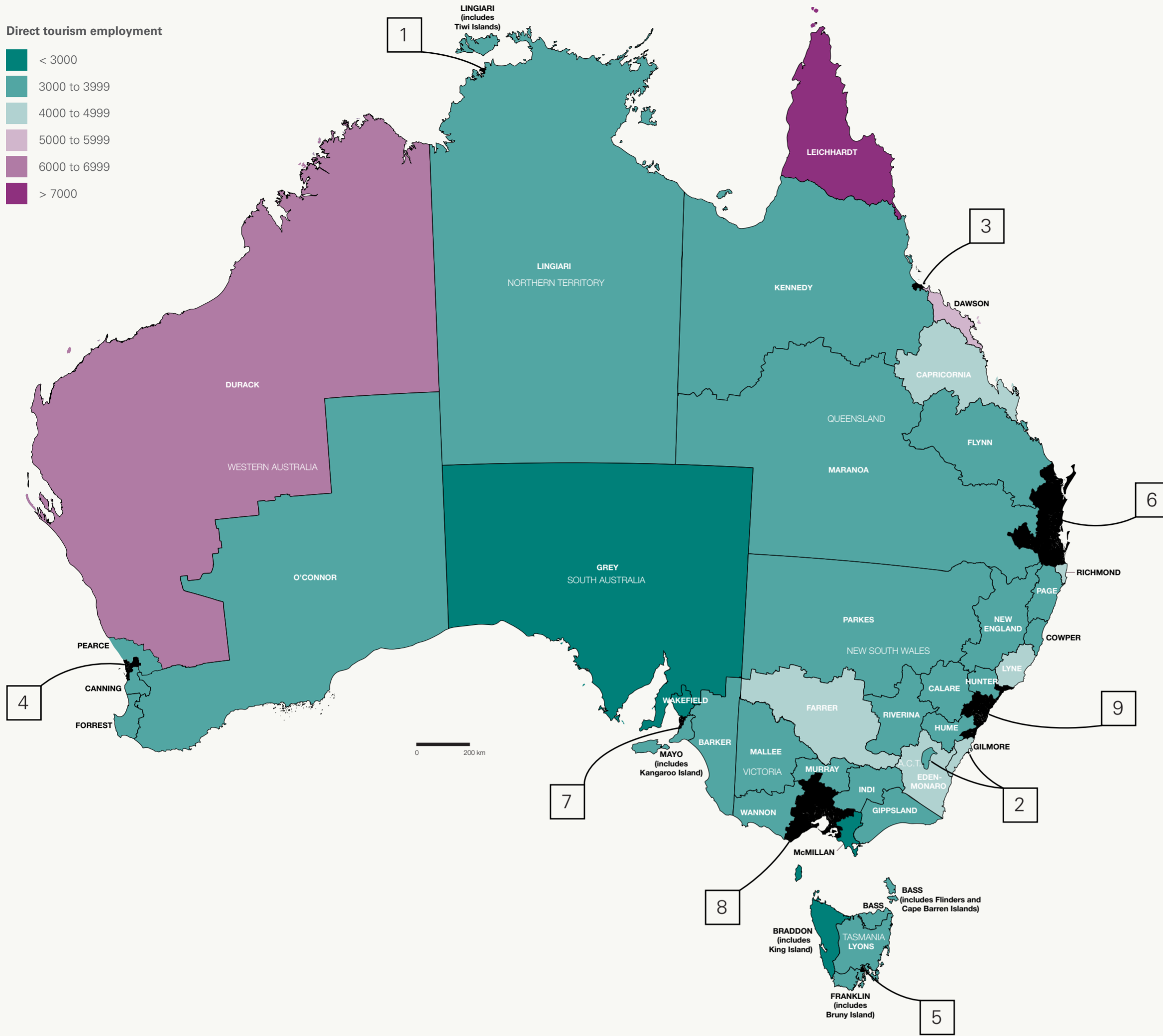
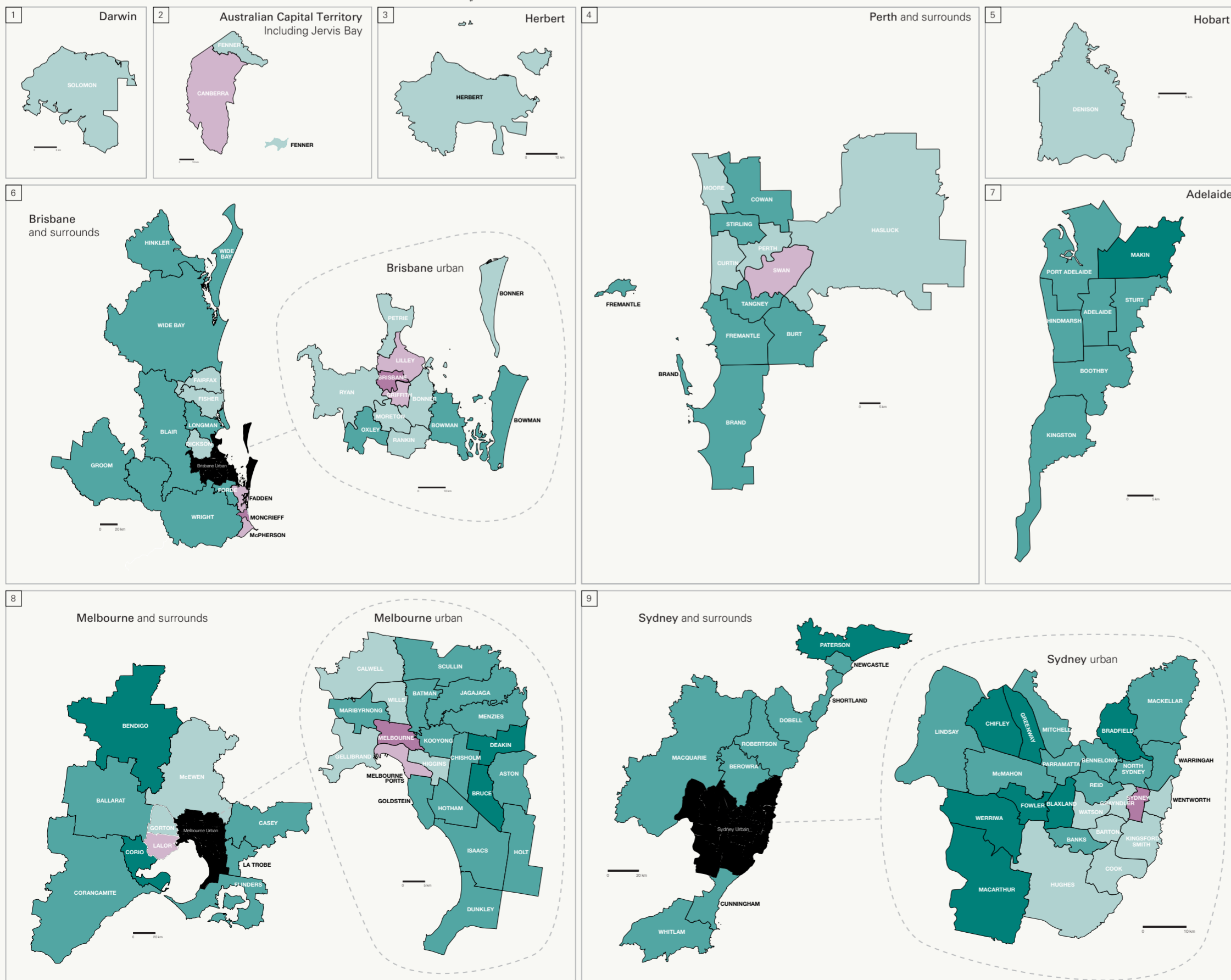


Figure 4 Tourism employment and business counts by Commonwealth electorate, 2015

| Federal electorate | State | Direct tourism employment | Business counts for tourism |
|--------------------|-------|---------------------------|-----------------------------|
| ADELAIDE           | SA    | 3891                      | 3770                        |
| ASTON              | VIC   | 3090                      | 1353                        |
| BALLARAT           | VIC   | 3655                      | 1520                        |
| BANKS              | NSW   | 3984                      | 1656                        |
| BARKER             | SA    | 3351                      | 1412                        |
| BARTON             | NSW   | 4320                      | 2543                        |
| BASS               | TAS   | 3612                      | 1105                        |
| BATMAN             | VIC   | 3764                      | 2228                        |
| BENDIGO            | VIC   | 2900                      | 1554                        |
| BENNELONG          | NSW   | 3410                      | 2009                        |
| BEROWRA            | NSW   | 3083                      | 1434                        |
| BLAIR              | QLD   | 3050                      | 861                         |
| BLAXLAND           | NSW   | 2558                      | 2213                        |
| BONNER             | QLD   | 4299                      | 1563                        |
| BOOTHBY            | SA    | 3193                      | 1162                        |
| BOWMAN             | QLD   | 3916                      | 1217                        |
| BRADDON            | TAS   | 2869                      | 980                         |
| BRADFELD           | NSW   | 2905                      | 2007                        |
| BRAND              | WA    | 3202                      | 794                         |
| BRISBANE           | QLD   | 6502                      | 3433                        |
| BRUCE              | VIC   | 2815                      | 2004                        |
| BURT               | WA    | 3044                      | 1191                        |
| CALARE             | NSW   | 3696                      | 1554                        |
| CALWELL            | VIC   | 4338                      | 1741                        |
| CANBERRA           | ACT   | 5169                      | 1825                        |
| CANNING            | WA    | 3434                      | 1018                        |
| CAPRICORNIA        | QLD   | 4040                      | 1197                        |
| CASEY              | VIC   | 3399                      | 1196                        |
| CHIFLEY            | NSW   | 2809                      | 940                         |
| CHISHOLM           | VIC   | 3636                      | 2361                        |
| COOK               | NSW   | 4055                      | 1914                        |
| CORANGAMITE        | VIC   | 3731                      | 1585                        |
| CORIO              | VIC   | 2729                      | 1551                        |
| COWAN              | WA    | 3629                      | 1351                        |
| COWPER             | NSW   | 3479                      | 1766                        |
| CUNNINGHAM         | NSW   | 3393                      | 1477                        |
| CURTIN             | WA    | 4147                      | 2184                        |
| DAWSON             | QLD   | 5325                      | 1545                        |
| DEAKIN             | VIC   | 2915                      | 1578                        |
| DENISON            | TAS   | 4289                      | 1557                        |
| DICKSON            | QLD   | 4137                      | 1114                        |
| DOBELL             | NSW   | 3690                      | 1134                        |
| DUNKLEY            | VIC   | 3017                      | 1412                        |
| DURACK             | WA    | 6195                      | 1583                        |
| EDEN-MONARO        | NSW   | 4311                      | 1661                        |
| FADDEN             | QLD   | 5024                      | 1940                        |
| FAIRFAX            | QLD   | 4300                      | 1779                        |
| FARRER             | NSW   | 4456                      | 1673                        |
| FENNER             | ACT   | 4974                      | 1368                        |
| FISHER             | QLD   | 4073                      | 1667                        |
| FLINDERS           | VIC   | 3738                      | 1594                        |
| FLYNN              | QLD   | 3765                      | 1165                        |
| FORDE              | QLD   | 3749                      | 1085                        |
| FORREST            | WA    | 3641                      | 1481                        |
| FORWLER            | NSW   | 2943                      | 1609                        |
| FRANKLIN           | TAS   | 3392                      | 753                         |
| FREMANTLE          | WA    | 3930                      | 1686                        |
| GELLIBRAND         | VIC   | 4331                      | 2056                        |
| GILMORE            | NSW   | 4365                      | 1651                        |
| GIPPSLAND          | VIC   | 3212                      | 1576                        |
| GOLDSTEIN          | VIC   | 3498                      | 2246                        |
| GORTON             | VIC   | 4821                      | 1166                        |
| GRAYNDLER          | NSW   | 4376                      | 2647                        |
| GREENWAY           | NSW   | 2899                      | 1576                        |
| GREY               | SA    | 2801                      | 1340                        |
| GRIFFITH           | QLD   | 5418                      | 2095                        |
| GROOM              | QLD   | 3610                      | 1421                        |
| HASLUCK            | WA    | 4053                      | 1202                        |
| HERBERT            | QLD   | 4504                      | 1295                        |
| HIGGINS            | VIC   | 4075                      | 2782                        |
| HINDMARSH          | SA    | 3807                      | 1621                        |
| HINKLER            | QLD   | 3380                      | 1178                        |
| HOLT               | VIC   | 3853                      | 1218                        |
| HOTHAM             | VIC   | 3337                      | 2057                        |
| HUGHES             | NSW   | 4413                      | 1202                        |
| HUME               | NSW   | 3104                      | 1271                        |
| HUNTER             | NSW   | 3690                      | 1224                        |
| INDI               | VIC   | 3258                      | 1712                        |
| ISAACS             | VIC   | 3391                      | 1733                        |
| JAGAJAGA           | VIC   | 3248                      | 1410                        |
| KENNEDY            | QLD   | 3823                      | 1485                        |
| KINGSFORD SMITH    | NSW   | 4773                      | 2093                        |
| KINGSTON           | SA    | 3280                      | 773                         |
| KOOYONG            | VIC   | 3599                      | 2424                        |
| LA TROBE           | VIC   | 3338                      | 1277                        |
| LALOR              | VIC   | 5478                      | 1697                        |
| LEICHHARDT         | QLD   | 8535                      | 2367                        |
| LILLEY             | QLD   | 5310                      | 1550                        |
| LINDSAY            | NSW   | 3148                      | 1069                        |
| LINGIARI           | NT    | 3559                      | 704                         |
| LONGMAN            | QLD   | 3637                      | 864                         |
| LYNE               | NSW   | 4176                      | 1343                        |
| LYONS              | TAS   | 3361                      | 944                         |
| MACARTHUR          | NSW   | 2925                      | 994                         |
| MACKELLAR          | NSW   | 3535                      | 1920                        |
| MACQUARIE          | NSW   | 3616                      | 1483                        |
| MAKIN              | SA    | 2732                      | 873                         |
| MALLEE             | VIC   | 3353                      | 1521                        |
| MARANOA            | QLD   | 3645                      | 1673                        |
| MARIBYRNONG        | VIC   | 3725                      | 1849                        |
| MAYO               | SA    | 3505                      | 1311                        |
| MCEWEN             | VIC   | 4836                      | 1373                        |
| MCMAHON            | NSW   | 3227                      | 1540                        |
| MCMILLAN           | VIC   | 2933                      | 1362                        |
| MCPHERSON          | QLD   | 5353                      | 1929                        |
| MELBOURNE          | VIC   | 6787                      | 6361                        |
| MELBOURNE PORTS    | VIC   | 5398                      | 3588                        |
| MENZIES            | VIC   | 3206                      | 1779                        |
| MITCHELL           | NSW   | 3080                      | 1778                        |
| MONCRIEFF          | QLD   | 6672                      | 3096                        |
| MOORE              | WA    | 4024                      | 1272                        |
| MORETON            | QLD   | 4651                      | 2310                        |
| MURRAY             | VIC   | 3029                      | 1538                        |
| NEW ENGLAND        | NSW   | 3547                      | 1607                        |
| NEWCASTLE          | NSW   | 3359                      | 1673                        |
| NORTH SYDNEY       | NSW   | 3729                      | 2925                        |
| O'CONNOR           | WA    | 3996                      | 1575                        |
| OXLEY              | QLD   | 3576                      | 1216                        |
| PAGE               | NSW   | 3638                      | 1543                        |
| PARKES             | NSW   | 3836                      | 1600                        |
| PARRAMATTA         | NSW   | 3488                      | 2549                        |
| PATERSON           | NSW   | 2796                      | 1196                        |
| PEARCE             | WA    | 3596                      | 935                         |
| PERTH              | WA    | 4973                      | 3014                        |
| PETRIE             | QLD   | 4156                      | 1140                        |
| PORT ADELAIDE      | SA    | 3306                      | 1312                        |
| RANKIN             | QLD   | 4460                      | 1697                        |
| REID               | NSW   | 3928                      | 2864                        |
| RICHMOND           | NSW   | 4184                      | 1969                        |
| RIVERINA           | NSW   | 3980                      | 1488                        |
| ROBERTSON          | NSW   | 3790                      | 1388                        |
| RYAN               | QLD   | 4845                      | 1319                        |
| SCULLIN            | VIC   | 3165                      | 1377                        |
| SHORTLAND          | NSW   | 3126                      | 1033                        |
| SOLOMON            | NT    | 4980                      | 1092                        |
| STIRLING           | WA    | 3615                      | 1507                        |
| STURT              | SA    | 3151                      | 1403                        |
| SWAN               | WA    | 5039                      | 2024                        |
| SYDNEY             | NSW   | 6122                      | 7672                        |
| TANGNEY            | WA    | 3858                      | 1430                        |
| WAKEFIELD          | SA    | 2648                      | 900                         |
| WANNON             | VIC   | 3289                      | 1492                        |
| WARRINGAH          | NSW   | 3421                      | 2131                        |
| WATSON             | NSW   | 4277                      | 2722                        |
| WENTWORTH          | NSW   | 4101                      | 3049                        |
| WERRIWA            | NSW   | 2666                      | 1056                        |
| WHITLAM            | NSW   | 3449                      | 1214                        |
| WIDE BAY           | QLD   | 3821                      | 1724                        |
| WILLS              | VIC   | 4509                      | 2164                        |
| WRIGHT             | QLD   | 3625                      | 1295                        |



Map adapted from Federal Electorate Boundaries Map 2010, Australian Electoral Commission, 2010. Copyright Commonwealth of Australia, reproduced by permission.