



Australian Government  
Australian Trade and Investment Commission  
Tourism Research Australia

# Tourism businesses in Australia:

June 2018 to June 2023



## Acknowledgement of Country

In the spirit of reconciliation, we acknowledge the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respect to their elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

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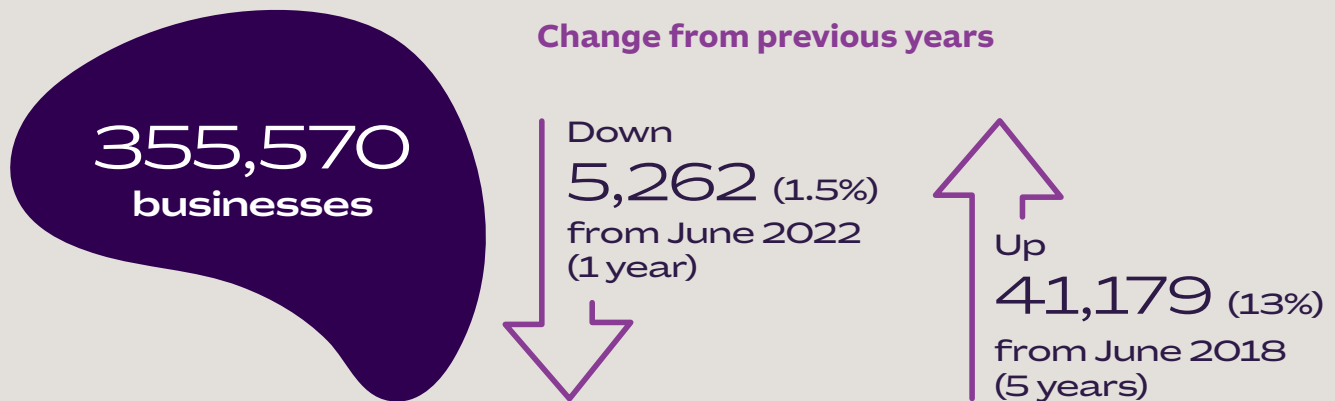
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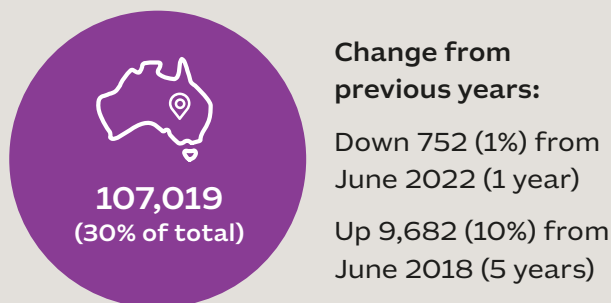
This report provides statistics on Australia's tourism businesses and trends in their growth over the past 5 years. It provides a snapshot of the number and characteristics of tourism businesses in June 2023. It then reports on changes in the tourism business population over the past 5 years (from June 2018 to June 2023).

# Tourism businesses in Australia June 2023

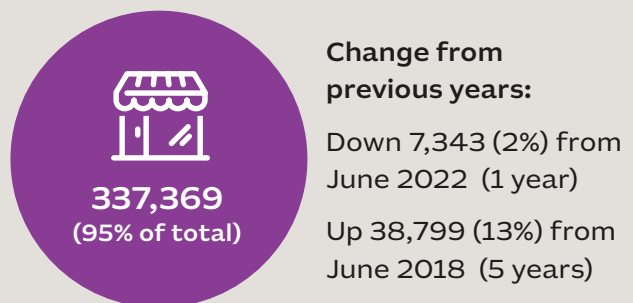
Number of tourism-related businesses June 2023



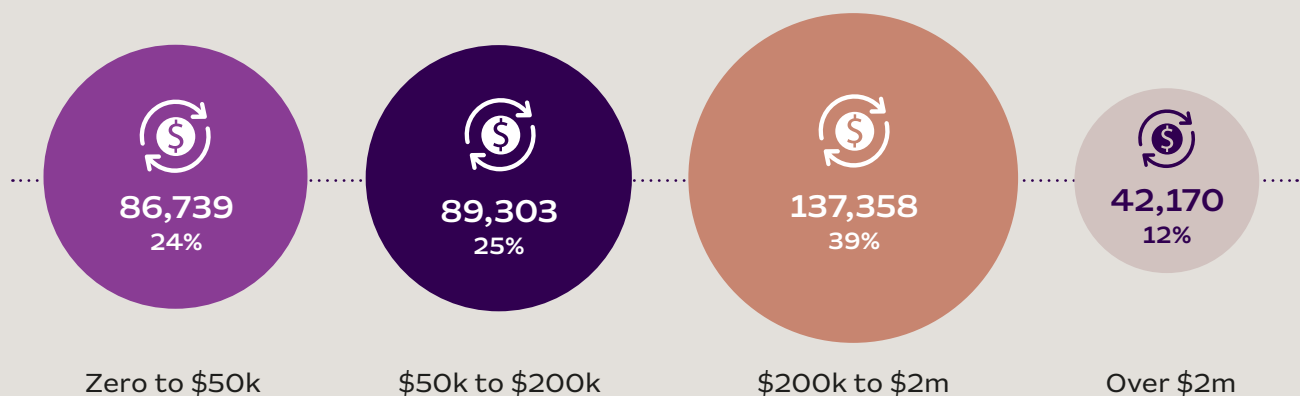
## Regional Australia<sup>1</sup>



## Small businesses<sup>2</sup>



## Businesses by turnover (June 2023)



1. Regional Australia includes all areas outside of state and territory capital cities and the Gold Coast tourism region

2. Businesses with fewer than 20 employees (including non-employing businesses)

# Executive summary

There were 355,570 tourism businesses in Australia in June 2023. This means 1 in 7 Australian businesses (14%) were tourism related.

These businesses are spread across 9 industry sectors. The largest 4 of these sectors (which together accounted for 91% of tourism businesses in June 2023) were:

- Retail trade: 155,755 businesses (44% of all tourism-related businesses)
- Cafes, restaurants and takeaways: 95,958 businesses (27%)
- Cultural, sports and recreation services: 36,422 businesses (10%)
- Taxi transport: 34,704 (10%)

Over the course of the 5 years to June 2023, the number of tourism-related businesses grew by 41,179 (13%) from a base of 314,373 in June 2018. This growth occurred mainly in the 4 years between 2018 and 2022. During this 4-year period, tourism-related business numbers grew by 46,459 (15%). However this growth trend reversed in the year to June 2023 when business numbers declined by 5,262 (1.5%) compared with June 2022.

The largest fluctuations in business numbers through the period from 2018 to 2023 occurred among smaller businesses, while change in the number of larger businesses was more stable. For example, businesses employing fewer than 5 people (and non-employing businesses) grew at more than double the rate of businesses employing 5 or more people in the 4 years between 2018 and 2022 (+17% versus +8% respectively). However, this trend reversed in the year to June 2023 when smaller businesses (employing fewer than 5 people) declined by 2.8% while larger businesses grew by 3.7%.

In relative terms, the fastest growing tourism sectors during the 5 years to 2023 were Motor vehicle hiring (which grew by 53%), Retail trade (+16%) and Cafes, restaurants and takeaways (+14%). Of the 9 sectors in the tourism business group, only 2 (Taxi transport and Casino and gambling services) experienced a decline in business numbers over this 5-year period (-7% and -9% respectively).

The states and territories with the fastest growth in tourism businesses over the past 5 years were Victoria (with 4.1% average annual growth in business numbers), the Australian Capital Territory (+3.2%) and the Northern Territory (+2.8%). However, this pattern did not persist into the final year of the 5-year reference period, with Victoria, the Northern Territory and South Australia experiencing the largest declines in the year to June 2023 (with falls in business numbers of 4.0%, 1.5% and 1.1% respectively).

Between June 2018 and June 2023, the number of tourism businesses in regional Australia experienced slower growth than in capital cities. The number of regional businesses grew at an annual average rate of 1.9% between June 2018 and June 2023, compared with 2.7% for capital cities. However, both regional Australia and the capital cities saw declines in the number of tourism businesses in the year to June 2023 (-0.7% and -1.8% respectively).

# Tourism businesses snapshot (June 2023)

There were 355,570 tourism businesses in Australia in June 2023. This means 1 in 7 Australian businesses (14%) were tourism related.

The subsections below break down these figures by:

- industry sectors
- business size (by employment and turnover)
- location (state and capital city/regional breakdown).

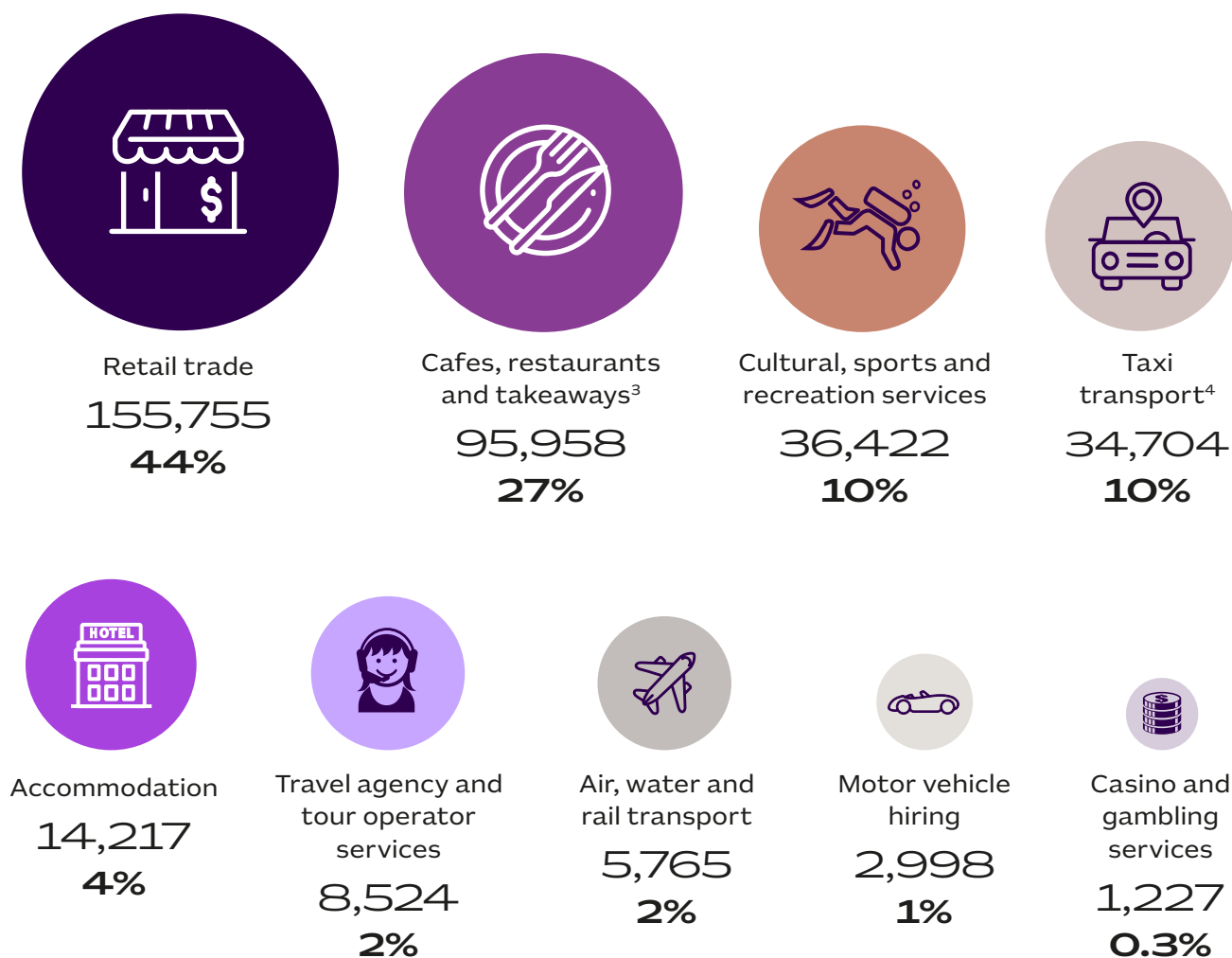
## Industry sectors of tourism businesses

The largest sector in the tourism-related business group is Retail trade (Figure 1). In June 2023, this sector accounted for 44% (or 155,755) of all tourism-related businesses. The next three largest sectors (“Cafés, restaurants and takeaways”, “Cultural, sports and recreation services” and “Taxi transport”) together accounted for 167,084 businesses (47% of the total). Accommodation accounted for 4% of tourism-related businesses and the remaining 4 sectors (“Travel agency and tour operator services”, “Air, water and rail transport”, “Motor vehicle hiring” and “Casino and gambling services”) together made up the remaining 5%.



Image courtesy of Tourism Australia

**Figure 1: Number of tourism related businesses by industry sector (June 2023)**



<sup>3</sup>. Includes pubs, clubs, taverns and bars

<sup>4</sup>. Includes ride-sharing services

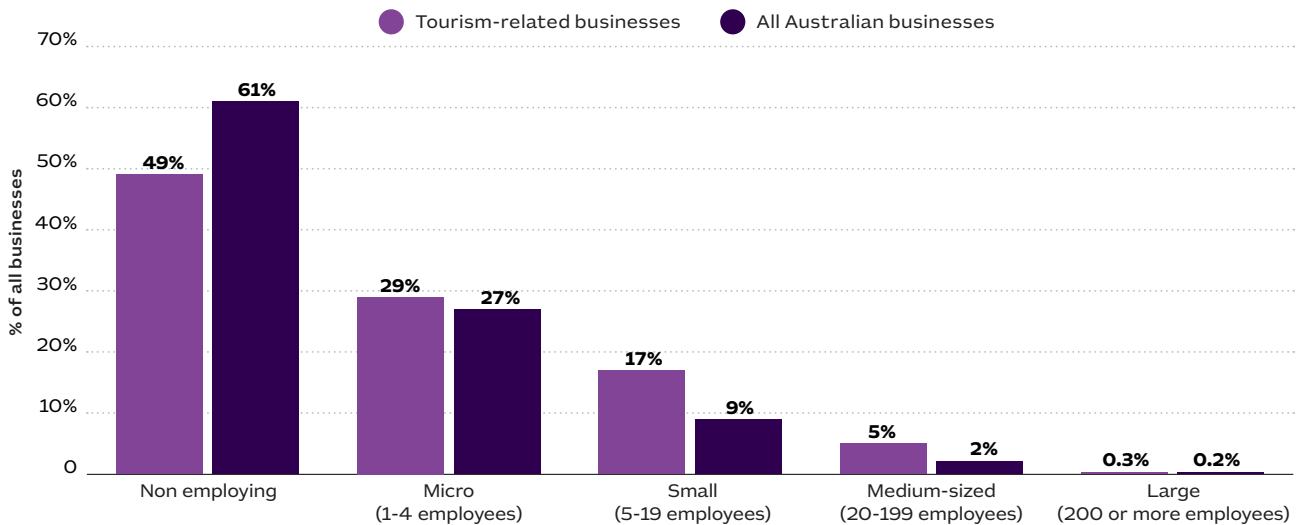
## Business size (by employment and turnover)

### Business size by employment

The largest groups of tourism-related businesses are non-employing businesses and micro-sized businesses (Figure 2 and see detailed data in Appendix A). Taken together, 78% of tourism-related businesses employ fewer than 5 people, 17% employ between 5 and 19 people, 5% employ between 20 to 199 people and only 0.3% employ over 200 people.

Although most tourism-related businesses are either non-employing or micro (1-4 employees), the tourism industry as a whole actually contains a larger proportion of businesses that employ 5 or more people than Australian businesses generally. For example, 22% of tourism-related businesses employ 5 or more people compared with only 11% for Australian businesses from all industries taken together.

**Figure 2: Number of tourism-related businesses by size (by number of employees) compared with all Australian businesses – June 2023**



Source: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165) (2023 and 2024)

### Business size by turnover

The distribution of tourism-related businesses by turnover is similar to that of all Australian businesses (Figure 3 and see detailed data in Appendix A). In June 2023:

- 50% of tourism-related businesses have a turnover under \$200,000 (compared with 57% of all Australian businesses)

- 39% of tourism related businesses (and 35% of all Australian businesses) have a turnover between \$200,000 and \$2 million
- the remaining 12% of tourism-related businesses (and 8% of all Australian businesses) have a turnover greater than \$2 million.

**Figure 3: Number of tourism-related businesses by turnover size, compared with all Australian businesses – June 2023**



Source: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165) (2023 and 2024)



## Business location

### Location by state

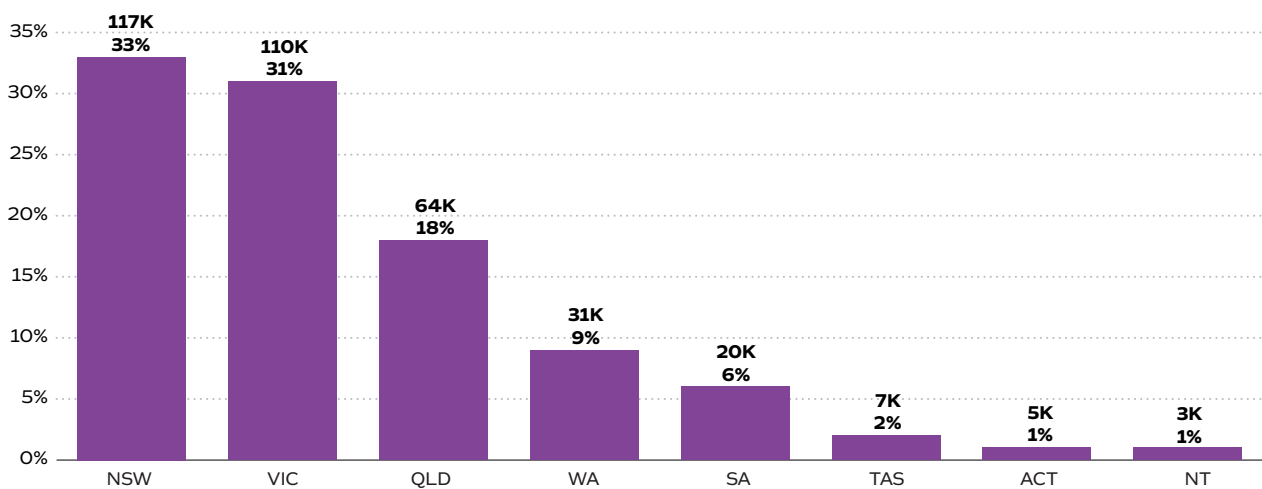
Most tourism businesses (82%) are in Australia's three most populous states (which together account for 77% of Australia's population) (Figure 4). In June 2023, there were:

- 116,693 tourism businesses (33% of Australian total) in New South Wales

- 109,595 tourism businesses (31% of Australian total) in Victoria
- 64,432 tourism businesses (18% of Australian total) in Queensland.

Overall, Victoria had one tourism business for every 62 residents living in the state, while NSW had one for every 71 residents. All other states and territories had one tourism business for 80 or more residents.

**Figure 4: Distribution of tourism-related businesses by state (June 2023)**



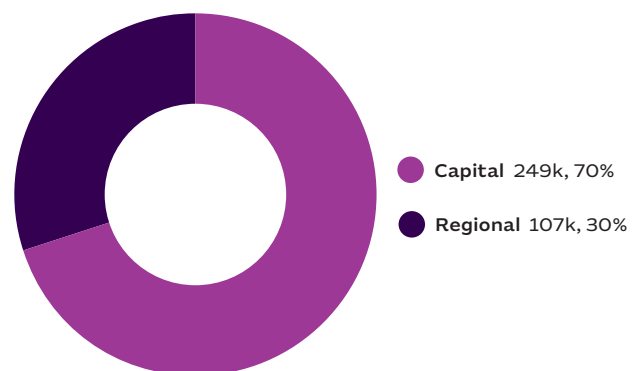
Source: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165), 2024

### Location of tourism-related businesses – regional vs capital cities

The majority (70%) of Australia's tourism-related businesses are located in capital cities, while 30% are in regional areas. In numerical terms, this equates to 248,551 businesses in capital cities and 107,019 in regional areas (Figure 5).

Capital cities have one tourism business for every 68 residents, which is a higher rate than that in regional areas, where there is one tourism business for every 85 residents.

**Figure 5: Location of tourism-related businesses: regional vs capital cities (June 2023)**



Source: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165), 2024

### Location by tourism region

Figure 6 shows the locations of tourism businesses in June 2023 by tourism region. Generally, the tourism regions with the largest number of tourism businesses are along the east coast and in capital cities.

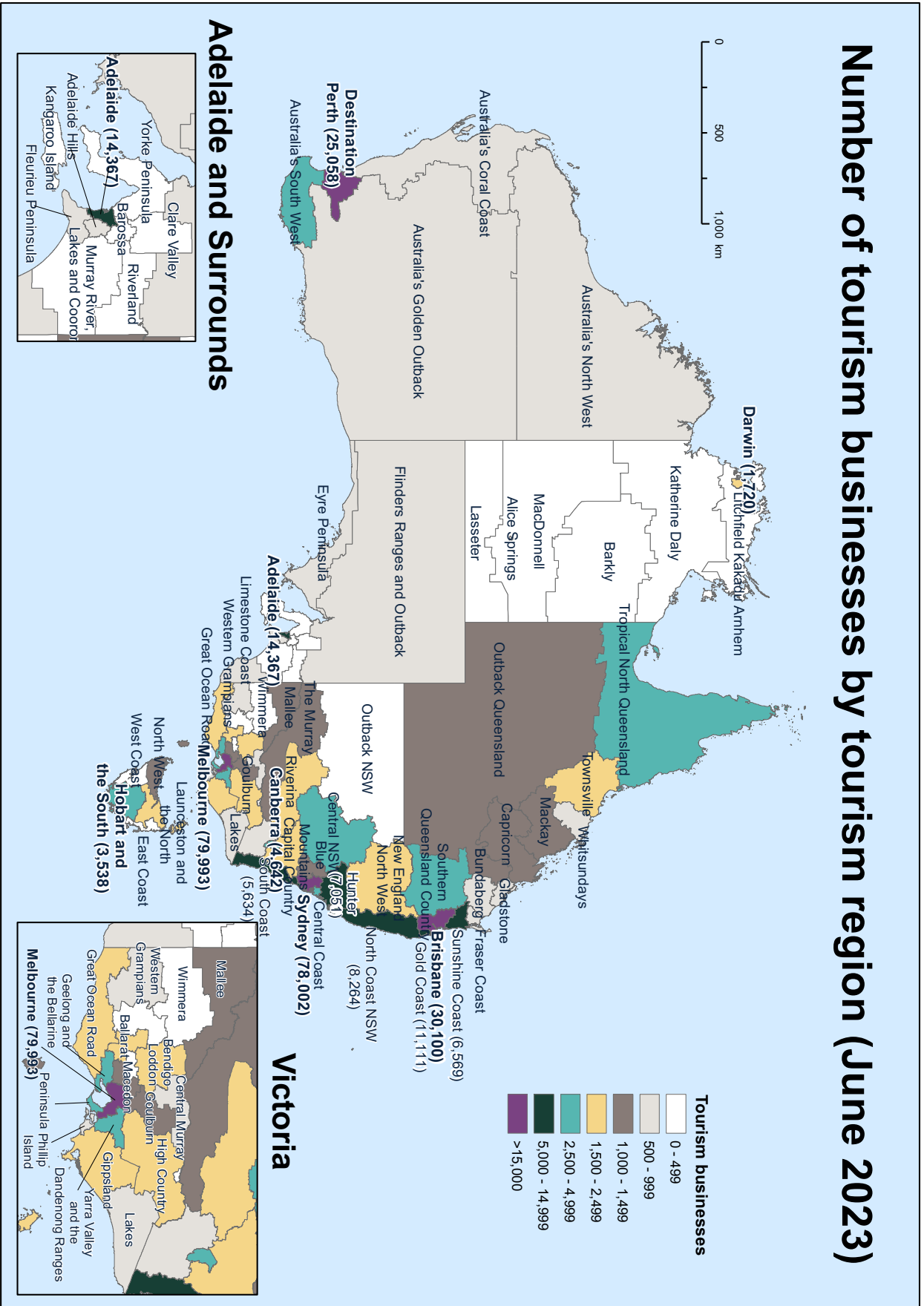
The 5 regions with the largest number of tourism businesses are shown in Table 1 below. Together, these 5 regions account for approximately 64% of Australia's tourism businesses.

**Table 1: Number of tourism businesses in top 5 tourism regions (June 2023)**

Tourism region	Number of tourism businesses	% of total tourism businesses
Melbourne	79,993	22%
Sydney	78,002	22%
Brisbane	30,100	8%
Destination Perth	25,058	7%
Adelaide	14,367	4%



**Figure 6: Number of tourism businesses by tourism region (Map)**





# Changes in tourism-related business numbers (June 2018 to June 2023)

## Change in the number of tourism businesses

There were 355,570 tourism businesses in Australia in June 2023. This was:

- 1.5% lower than in June 2022
- 13% higher than in June 2018.

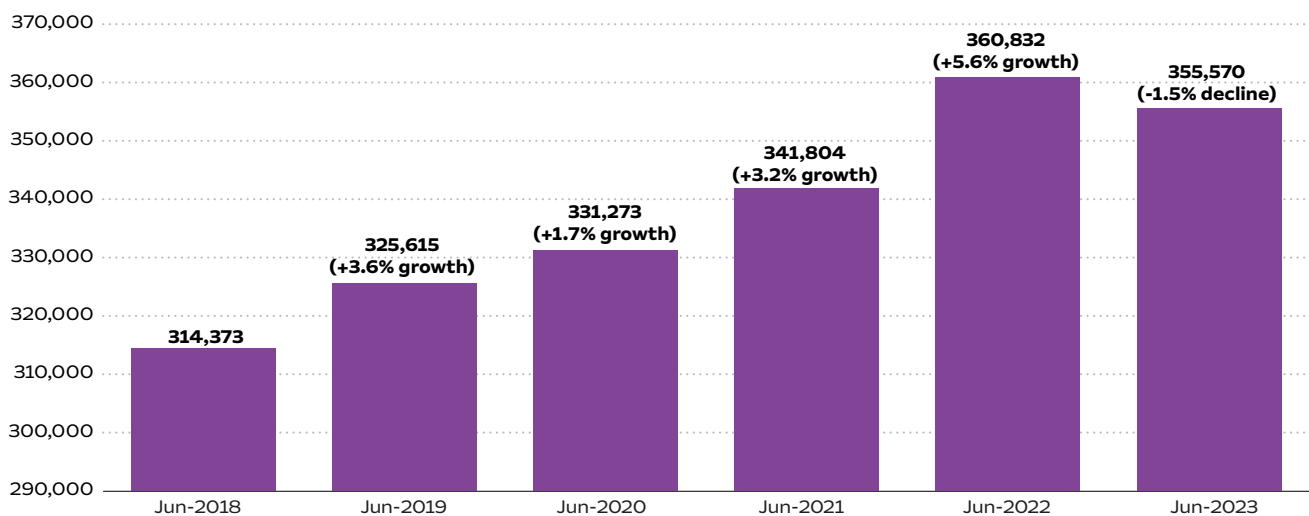
The decline in the number of tourism businesses over the past year is in contrast to continued growth over the previous 4 years (Figure 7). The first 4 years of this period (2018 to 2022) saw business numbers increase every year (at an average annual growth rate of +2.5%). However, the final year of the period (year to June 2023) saw a decline of 5,262 (-1.5%).

The decline in business numbers in the year to June 2023 was highly concentrated in 2 of the 9 sectors of the tourism industry (Retail trade and Taxi transport) (see below).



Image courtesy of Tourism Australia

**Figure 7: Number of tourism related businesses, June 2018 – June 2023**



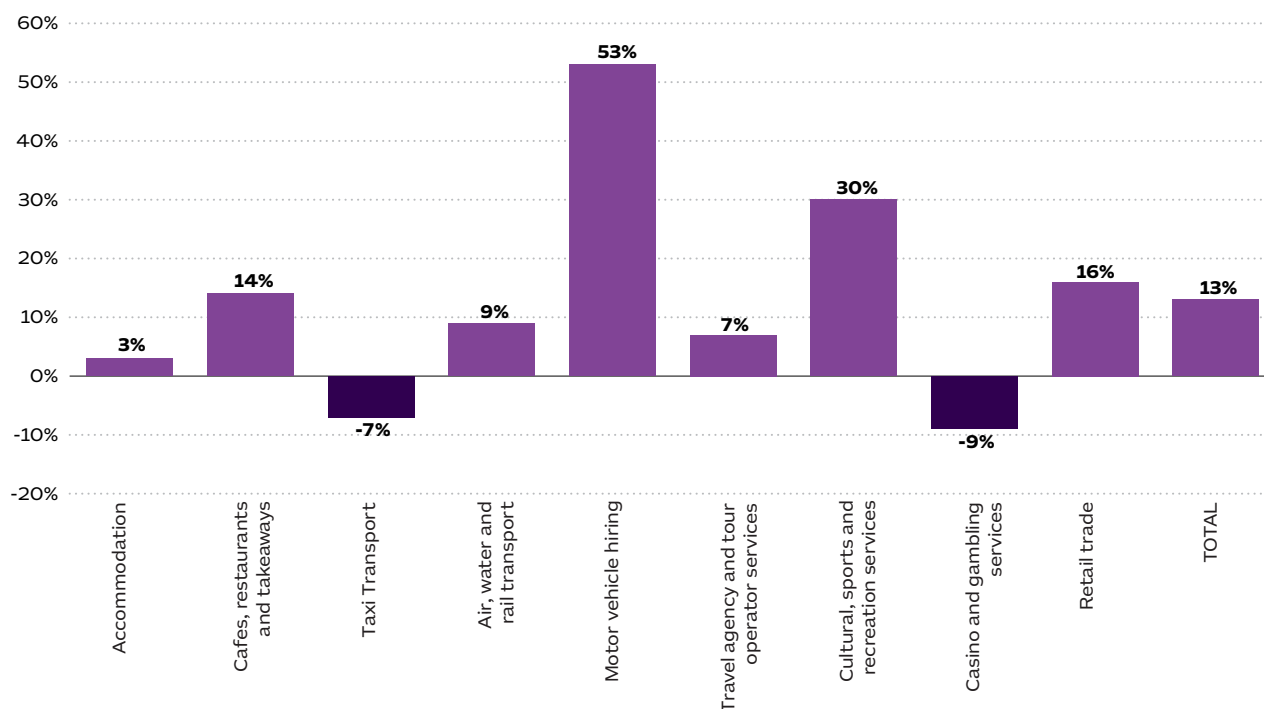
Source: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165) (2023 and 2024)

## Change in the number of businesses by industry sector

Of the 9 tourism-related sectors, 7 experienced growth and 2 (Casino and gambling services; and Taxi transport)

experienced a fall in business numbers in the 5 years between June 2018 and June 2023 (Figure 8 and see Table A4 in appendix A for more detail).

**Figure 8: Percentage change in number of tourism businesses by industry sector between June 2018 and June 2023**



### Four years of growth (2018 to 2022) and one year of decline (2022 to 2023)

Although, there was strong growth in 8 of the 9 sectors in the 4 years between 2018 and 2022 (only casinos and gambling services experienced negative growth in this period), this trend reversed in the year between June 2022 and June 2023 (see Table A4 in Appendix A).

The total number of tourism-related businesses fell by 5,262 (1.5%) between June 2022 and June 2023. Business numbers declined across 7 of the 9 sectors of the tourism industry during that year. The only sectors to achieve growth in the year to June 2023 were:

- Motor vehicle hiring (with 8.9% growth to reach 2,998 businesses)
- Cultural, sports and recreation services (with 1.9% growth to reach 36,422 businesses).

The bulk of the decline in business numbers (83%) between June 2022 and June 2023 occurred in 2 industry sectors:

- Taxi transport – 2,909 fewer businesses (as the industry continues to consolidate with the emergence of rideshare services)
- Retail trade – 2,211 fewer businesses<sup>5</sup>, (which is potentially the result of a broader pullback in discretionary spending in the economy).

5. Almost all of the decline in business numbers in the retail sector occurred in the micro-business segment (employing 1-4 people). Note: the retail sector did not have a large decline in relative terms (-1.4%), however, this decline was large in absolute terms due to the large size of the retail sector.

## Change in the number of businesses, grouped by number of employees

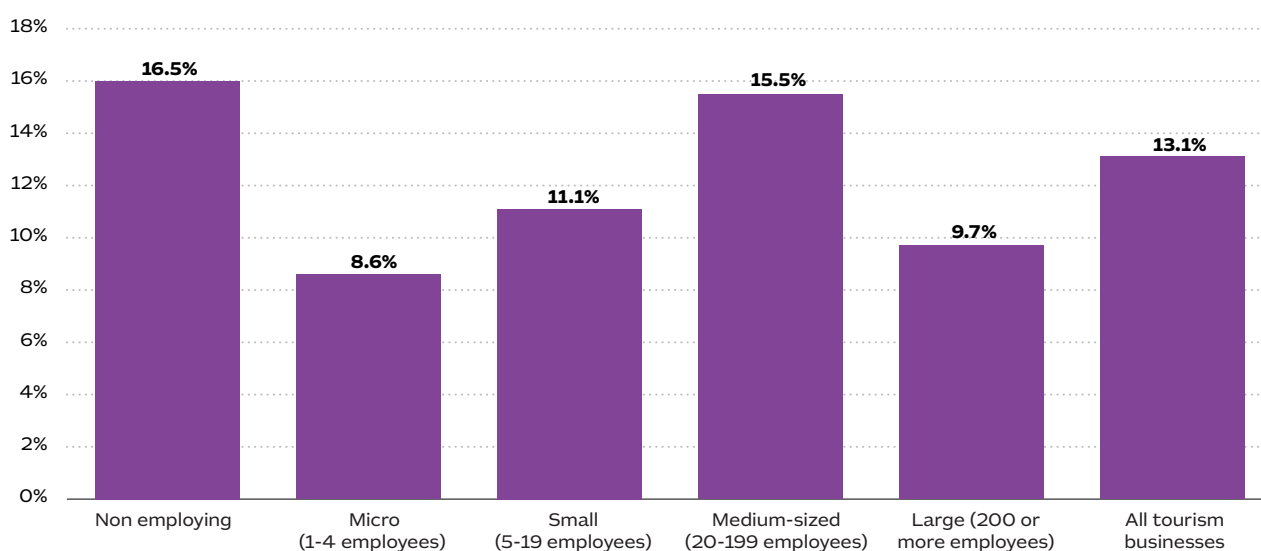
Tourism businesses are classified as non-employing, micro (1-4 employees), small (5-19 employees), medium-sized (20-199 employees) or large (200 or more employees). Most (around 95%) are small operations with fewer than 20 employees. In June 2023:

- 46% or 164,727 were micro or small enterprises

- 49% or 172,641 had no employees other than the owner.

The relative proportions of the industry by business size remained relatively stable between June 2018 and June 2023. Nevertheless, there was some variation in the growth rate of business numbers over the past 5 years when grouped by number of employees (Figure 9).

**Figure 9: Percentage change in number of tourism businesses by business size between June 2018 and June 2023**



All groups of business sizes grew in numbers in the 5 years between 2018 and 2023, albeit at different rates. However, in the year to June 2023, micro-businesses (those with 1 to 4 employees) saw a 7.7% decline in business numbers (a fall of 8,598 businesses). This was the only business size group to see a decline in business numbers between June 2022 and June 2023 (see Table A5 in Appendix A).

### More fluctuation in smaller businesses than larger ones

The largest fluctuations in business numbers over the 5 years to June 2023 generally occurred in smaller businesses, while the numbers of larger businesses were more stable. Businesses employing fewer than

5 people (and non-employing businesses) grew at more than double the rate of businesses employing 5 or more people in the 4 years between 2018 and 2022 (+16.7% versus +8.0% respectively). In the year to June 2023, the number of these smaller businesses declined by 2.8% while the number of larger businesses grew by 3.7%.

Large business' (greater than 200 employees) share of the total tourism-related business population remained steady at just 0.3% of all tourism-related businesses between 2018 and 2023. This is the smallest group of tourism-related businesses by size. There were 84 more large businesses in June 2023 than in June 2018 – an increase of 9.7%.

## Change in the number of businesses grouped by turnover

The decline in the number of businesses in the year to June 2023 was concentrated in the group of businesses with the smallest turnover, while all other groups saw an increase in the number of businesses (Figure 10). Between June 2022 and June 2023 the number of businesses with turnover:

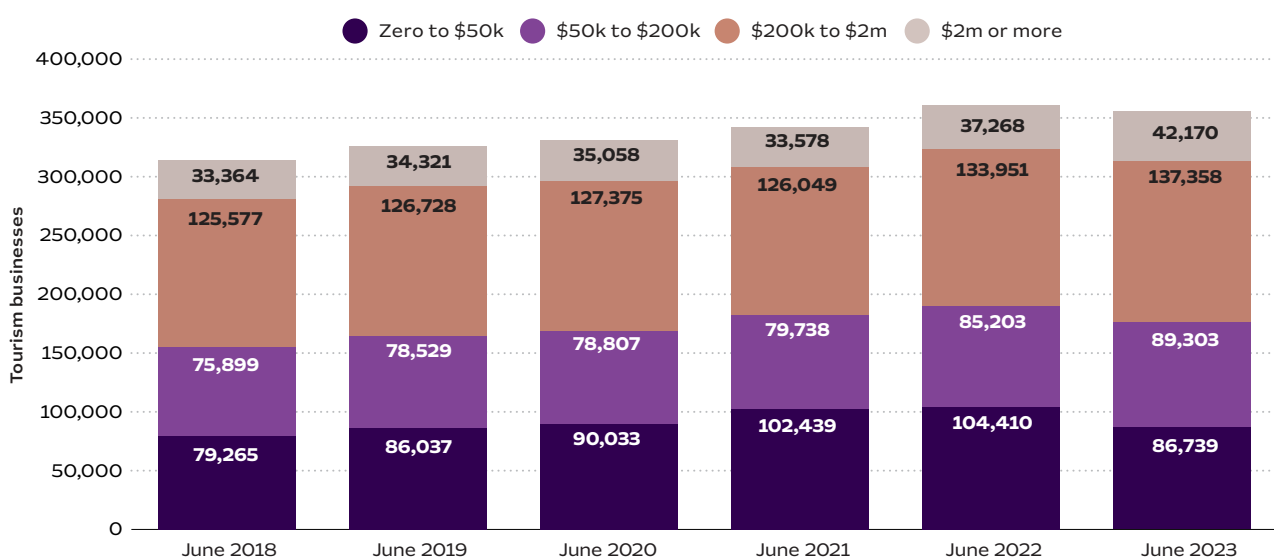
- under \$50,000 decreased by 17% or 17,671
- of \$50,000 to \$200,000 increased by 5% or 4,100
- of \$200,000 to \$2 million increased by 3% or 3,407
- of \$2 million or more increased by 13% or 4,902.

Over the 5 years to June 2023, the largest fluctuations in business numbers generally occurred in businesses with smaller turnovers while the numbers of larger-turnover businesses were more stable. (This is a similar finding to that noted above for trends in growth by business size by number of employees.)

Over the 5-year period between June 2018 to June 2023, the number of tourism businesses with turnover over \$2 million grew by 26% or 8,806, while the number with turnover under \$200,000 grew at a more modest rate of 13% or 20,878. However, there was greater year-to-year fluctuation in smaller-turnover business groups than in larger-turnover groups.

For example, over the first 4 years of the 5-year period of this report (2018 to 2022) growth in smaller-turnover businesses was more rapid than that of larger-turnover businesses. During this earlier 4-year period, the number of businesses with turnover under \$200,000 grew by 22% while the number of businesses with turnover over \$200,000 grew by only 8%. However, in the last year of the reporting period (2022 to 2023), this trend reversed with the number of businesses with larger turnover generally increasing at a faster rate than those with lower turnover.

**Figure 10: Tourism related businesses by turnover, June 2018 to June 2023**





## Change in the number of businesses by location

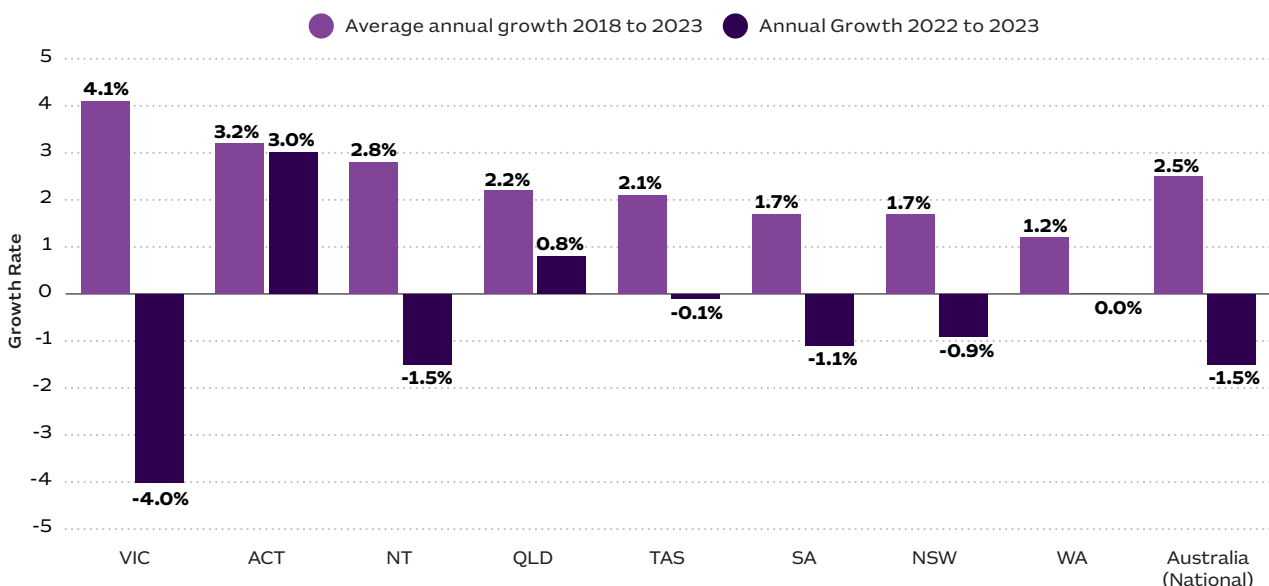
### Change by state

Tourism business numbers grew at different rates across the states and territories between June 2018 and June 2023 (Figure 11). In order of growth in business numbers over the past 5 years:

- Victoria had the strongest average annual growth rate of 4.1% over the 5 years to June 2023. However, the state experienced a decline of 4.0% in the year to June 2023.
- The Australian Capital Territory had an average annual growth rate of 3.2% over the 5 years to June 2023 and a growth rate of 3.0% in the year to June 2023.
- The Northern Territory had an average annual growth rate of 2.8% over the 5 years to June 2023. However, the NT experienced a decline of 1.5% in the year to June 2023.
- Queensland had an average annual growth rate of 2.2% over the 5 years to June 2023 and a growth rate of 0.8% in the year to June 2023.
- Tasmania had an average annual growth rate of 2.1% over the 5 years to June 2023, but experienced a decline of 0.1% in the year to June 2023.
- South Australia and New South Wales had the same average annual growth rate of 1.7% over the 5 years to June 2023, but both states experienced declines in the year to June 2023 (SA declined by 1.1% while NSW declined by 0.9%).
- Western Australia had an average annual growth rate of 1.2% over the 5 years to June 2023, but did not experience any growth in the year to June 2023.



**Figure 11: Change in the number of tourism related businesses by state and territory**

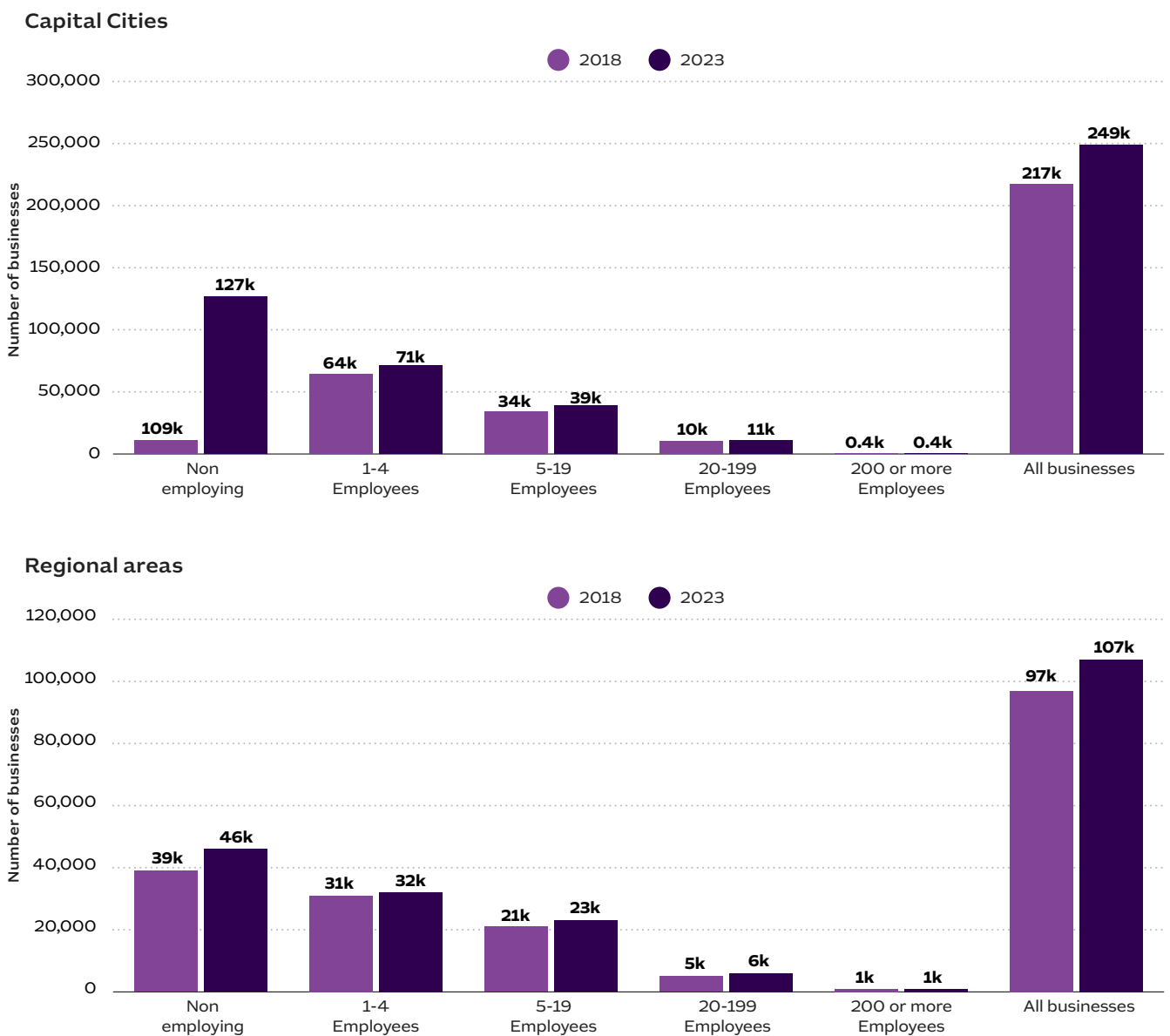


### Change by capital cities or regional Australia

The number of tourism businesses in regional areas grew from 97,337 in 2018 to 107,019 in 2023 (an average annual growth rate of 1.9%). The number in capital cities grew at a faster rate (an average annual growth rate of 2.7%) and increased from 217,036 in 2018 to 248,551 in 2023 (Figure 12).

However, in both regional areas and capital cities this growth occurred in the first 4 years (2018 to 2022), then business numbers declined slightly in the one year to June 2023. Regional areas saw aggregate growth of 11% in the 4 years to 2022, then a decline of 0.7% in the year to June 2023. Business numbers in capital cities were more volatile with aggregate growth of 17% in the 4 years to 2022, then a decline of 1.8% in the year to June 2023 (Table A6 in Appendix A).

**Figure 12: Number of tourism businesses in June 2018 compared with June 2023 (capital cities top; regional areas bottom)**





# Methodology

The data used to produce these counts are extracted from the Australian Bureau of Statistics Business Register (ABSBR). The ABSBR is populated using administrative data from Australian Business Number (ABN) registrations recorded in the Australian Business Register (ABR), and business data from the Australian Taxation Office (ATO).

For the purposes of this Tourism Businesses in Australia report, a business is defined as a legal entity engaging in productive activity and/or other forms of economic activity in the market sector. Businesses are defined as engaging in productive activity where they have a Goods and Services Tax (GST) role and are actively remitting GST through Business Activity Statements (BAS). Counts of businesses in this release include only

actively trading businesses in the Australian market sector through to end-June 2023. Actively trading businesses include:

- ABNs from the non-profiled population that are actively remitting Goods and Services Tax (GST) – most of the businesses in the ABSBR are in this group, and most have simple structures that are suitable for ABS statistical purposes at the ABN level. One ABN equates to one business.
- Types of Activity Unit (TAUs) from the profiled population – the small number of businesses/groups of businesses that are large, complex and diverse and for which the ABS maintains its own economic unit structure.

## Data sources

- Australian Bureau of Statistics. (2023). *Counts of Australian Businesses, including Entries and Exits*. Retrieved February 2024, from <https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits/latest-release#data-downloads>
- Australian Bureau of Statistics. (2024). *Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023*.

Image courtesy of Tourism Australia



# Appendix A: Data tables

**Table A1: Tourism businesses in June 2023 by industry sector**

Industry sector	Number of businesses (June 2023)	% of Total
Retail trade	155,755	44%
Cafés, restaurants and takeaways <sup>6</sup>	95,958	27%
Cultural, sports and recreation services	36,422	10%
Taxi transport <sup>7</sup>	34,704	10%
Accommodation	14,217	4%
Travel agency and tour operator services	8,524	2%
Air, water and rail transport	5,765	2%
Motor vehicle hiring	2,998	1%
Casino and gambling services	1,227	0.3%
<b>Grand total</b>	<b>355,570</b>	<b>100%</b>

6. Includes pubs, clubs, taverns and bars. 7. Includes ride-sharing services.

**Table A2: Number of tourism businesses by size (employees) compared with all Australian businesses – June 2023**

Business Size	Tourism-related businesses		All Australian Businesses	
	Number	% of total	Number	% of total
Non employing	172,642	49%	1,585,693	61%
Micro (1-4 employees)	103,622	29%	703,467	27%
Small (5-19 employees)	61,105	17%	231,259	9%
Medium-sized (20-199 employees)	17,254	5%	64,559	2%
Large (200 or more employees)	947	0.30%	4,895	0.2%
<b>Total</b>	<b>355,570</b>	<b>100%</b>	<b>2,589,873</b>	<b>100%</b>

Sources: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165) (2023 and 2024)

**Table A3: Number of tourism businesses by turnover size, compared with all Australian businesses – June 2023**

Business turnover	Tourism-related businesses		All Australian Businesses	
	Number	% of total	Number	% of total
Zero to less than \$50k	86,739	24%	638,893	25%
\$50k to less than \$200k	89,303	25%	845,884	33%
\$200k to less than \$2m	137,358	39%	895,806	35%
\$2m to less than \$5m	24,558	7%	117,843	5%
\$5m to less than \$10m	9,164	3%	43,729	2%
\$10m or more	8,448	2%	47,718	2%
<b>Total</b>	<b>355,570</b>	<b>100%</b>	<b>2,589,873</b>	<b>100%</b>

Sources: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165) (2023 and 2024)

**Table A4: Growth in tourism businesses in Australia between June 2018 and June 2023**

Tourism-related sector	Number of businesses		Change 2018-23		Earlier 4-year period Change 2018-22		Later 1-year period Change 2022-23	
	Jun-18	Jun-23	Number	Per cent	Number	Per cent	Number	Per cent
Accommodation	13,769	14,217	448	3.3%	773	5.6%	-325	-2.2%
Air, water and rail transport	5,301	5,765	464	8.8%	610	11.5%	-146	-2.5%
Cafes, restaurants and takeaways <sup>8</sup>	84,245	95,958	11,713	13.9%	12,099	14.4%	-386	-0.4%
Casino and gambling services	1,349	1,227	-122	-9.0%	-58	-4.3%	-64	-5.0%
Cultural, sports and recreation services	27,991	36,422	8,431	30.1%	7,767	27.7%	664	1.9%
Motor vehicle hiring	1,955	2,998	1,043	53.4%	798	40.8%	245	8.9%
Retail trade	134,554	155,755	21,201	15.8%	23,412	17.4%	-2,211	-1.4%
Taxi transport <sup>9</sup>	37,257	34,704	-2,553	-6.9%	356	1.0%	-2,909	-7.7%
Travel agency and tour operator services	7,952	8,524	572	7.2%	702	8.8%	-130	-1.5%
<b>Total</b>	<b>314,373</b>	<b>355,570</b>	<b>41,197</b>	<b>13.1%</b>	<b>46,459</b>	<b>14.8%</b>	<b>-5,262</b>	<b>-1.5%</b>

8. Includes pubs, clubs, taverns and bars. 9. Includes ride-sharing services. Note: Sum may not add to total due to measures taken by the Australian Bureau of Statistics to ensure industry level data confidentiality

**Table A5: Change in business numbers by employment size**

Business size	Number of businesses		Change 2018-23		Earlier 4-year period Change 2018-22		Later 1-year period Change 2022-23	
	Jun-18	Jun-23	Number	Per cent	Number	Per cent	Number	Per cent
Non employing	148,139	172,642	24,503	16.5%	23,961	16.2%	542	0.3%
Micro (1-4 employees)	95,410	103,622	8,212	8.6%	16,810	17.6%	-8,598	-7.7%
Small (5-19 employees)	55,021	61,105	6,084	11.1%	5,371	9.8%	713	1.2%
Medium-sized (20-199 employees)	14,940	17,254	2,314	15.5%	286	1.9%	2,028	13.3%
Large (200 or more employees)	863	947	84	9.7%	31	3.6%	53	5.9%
<b>Total</b>	<b>314,373</b>	<b>355,570</b>	<b>41,197</b>	<b>13.1%</b>	<b>46,459</b>	<b>14.8%</b>	<b>-5,262</b>	<b>-1.5%</b>

Source: ABS, Counts of Australian Businesses, including Entries and Exits, June 2019 to June 2023 (Cat: 8165), 2024 (customised data set)

**Table A6: Tourism businesses by capital city/regional Australia, June 2023**

Business Size	Regional Australia		Capital cities	
	Businesses	Change on June 2022	Businesses	Change on June 2022
Non employing	45,688	2.2%	126,954	-0.4%
Micro	32,182	-7.0%	71,440	-8.0%
Small	22,585	0.7%	38,520	1.5%
Medium	6,056	9.8%	11,198	15.3%
Large	508	-3.6%	439	19.6%
<b>Total</b>	<b>107,019</b>	<b>-0.7%</b>	<b>248,551</b>	<b>-1.8%</b>





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