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THE HILLS SHIRE ECONOMIC SUMMARY REPORT

SYDNEY HILLS BUSINESS CHAMBER

THE HILLS
Sydney's Garden Shire

STEPHEN GARRARD

Senior Co-Ordinator

Economic Development - Business

Telephone: 02 9843 0324

Mobile: 0421 205 815

Email: sgarrard@thehills.nsw.gov.au

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Summary

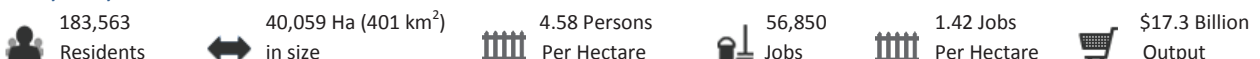
The Hills Shire, commonly referred to as The Sydney Hills is located in Sydney's northern suburbs about 30 kilometres from the Sydney CBD. The Sydney Hills is bounded by Hawkesbury Shire in the north, Hornsby Shire in the east, Parramatta City in the south and Blacktown City in the west.

The Sydney Hills occupies an area of 401 square kilometres stretching from Oatlands in the south to Wisemans Ferry in the north. The Shire is centrally located in Sydney's North, adjacent to the M2 Hills and M7 Motorways and the proposed North West Metro Link and North West growth centre, a major growth area for the Sydney basin. Two thirds of the Shire is rural land, some of which is used for farming and other agricultural industries. The Sydney Hill's central location allows businesses and organisations to tap into

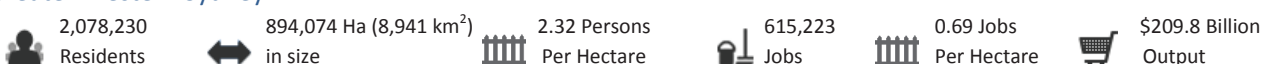
the growing commercial business areas between the North Shore and the Sydney Hills, the legal community of Parramatta and the rapidly expanding transport, warehousing and distribution hub along the M7.

With Norwest Business Park at its heart, The Sydney Hills is one of Sydney's hidden gems for business. With a rapidly growing economy totalling \$8 Billion in 2011 and a 100,000 strong workforce, The Sydney Hills is fast becoming known as an elite service hub for businesses providing professional and financial services to companies located across Western Sydney. The Sydney Hills has a major employment node located near brand new homes and planned neighbourhoods, some of the state's top schools, and offers a relaxed lifestyle surrounded by parks, gardens and bushland.

The Sydney Hills



Greater Western Sydney



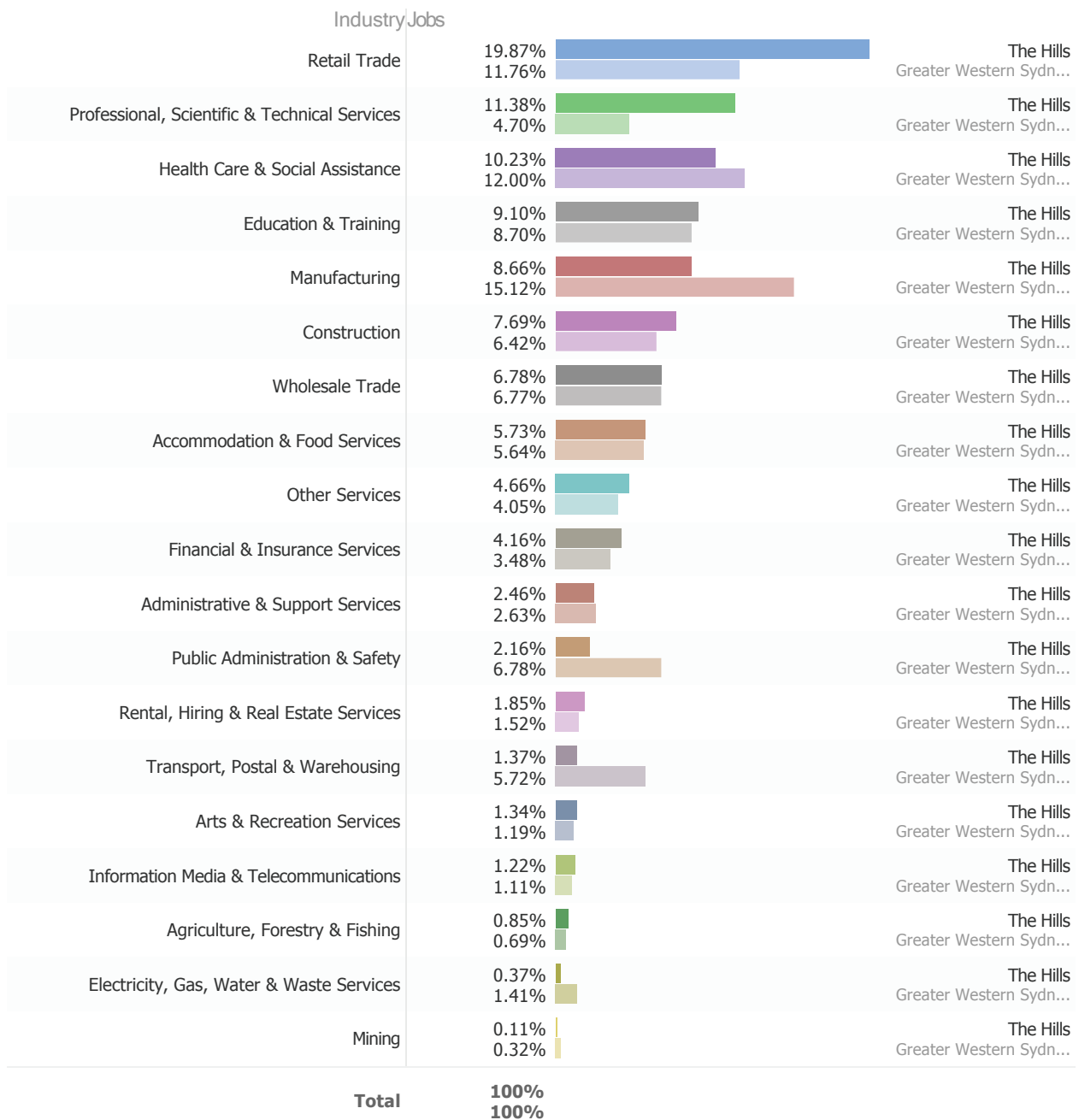
Employment by Industry

It is estimated that 56,850 people work in The Hills. The Hills represents 9.24 % of the 615,223 people working in Greater Western Sydney, 1.90 % of the 2,996,038 people working in New South Wales and 0.58 % of the 9,824,444 people working in Australia.

The Hills

Employment by Industry

► All Industries - All Zones



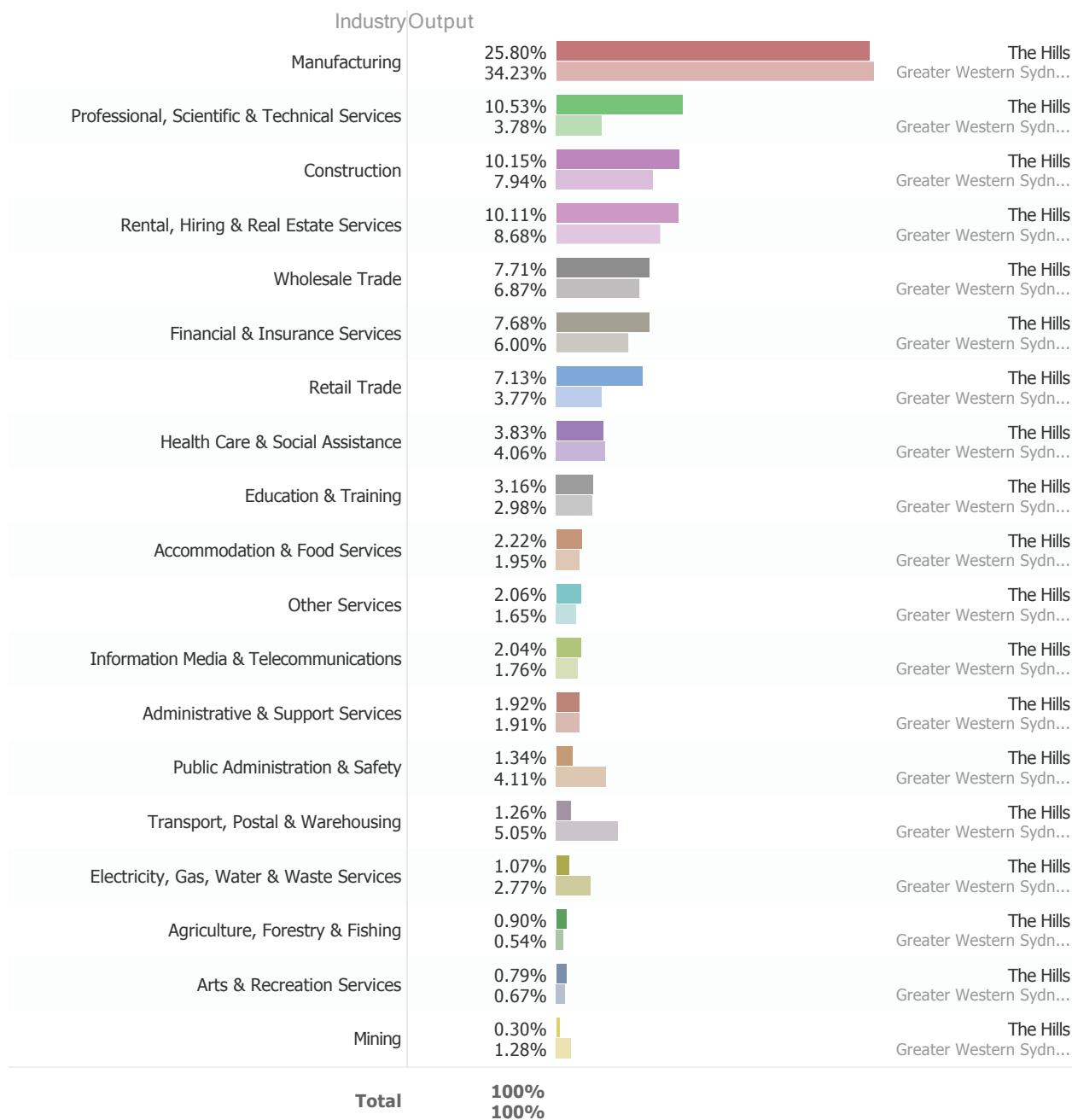
Output by Industry

The output generated by the The Hills economy is estimated at \$17.296 billion. The Hills represents 8.25 % of the \$209.729 billion in output generated in Greater Western Sydney, 1.78 % of the \$973.007 billion in output generated in New South Wales and 0.54 % of the \$3.178 trillion in output generated in Australia.

The Hills

Output by Industry

► All Industries - All Zones



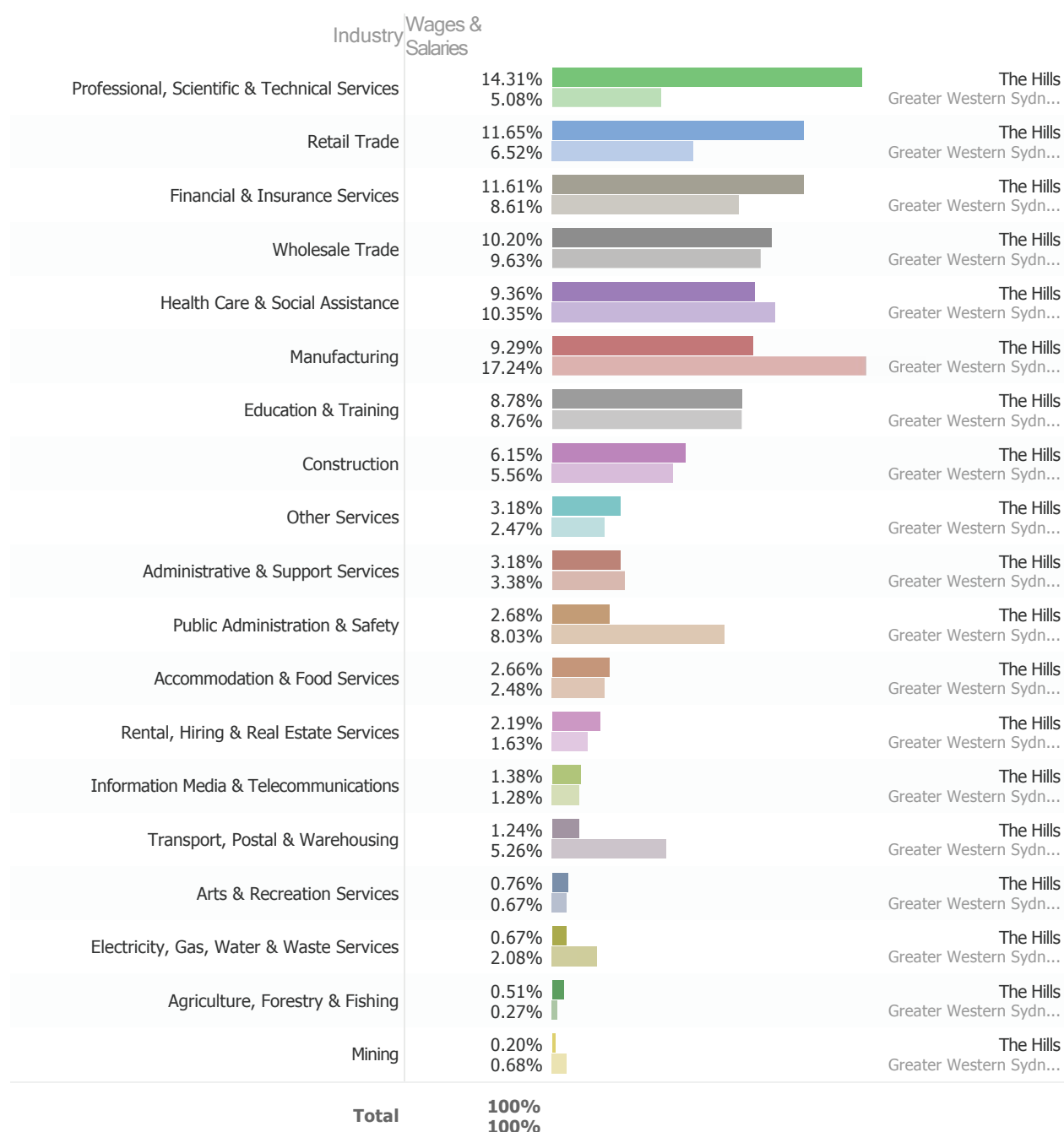
Wages and Salaries by Industry

The wages and salaries paid by businesses and organisations in The Hills is estimated at \$4.074 billion. The Hills represents 8.74 % of the \$46.607 billion in wages & salaries paid by businesses and organisations in Greater Western Sydney, 1.77 % of the \$230.286 billion in wages & salaries paid by businesses and organisations in New South Wales and 0.57 % of the \$713.527 billion in wages & salaries paid by businesses and organisations in Australia.

The Hills

Wages & Salaries by Industry

► All Industries - All Zones



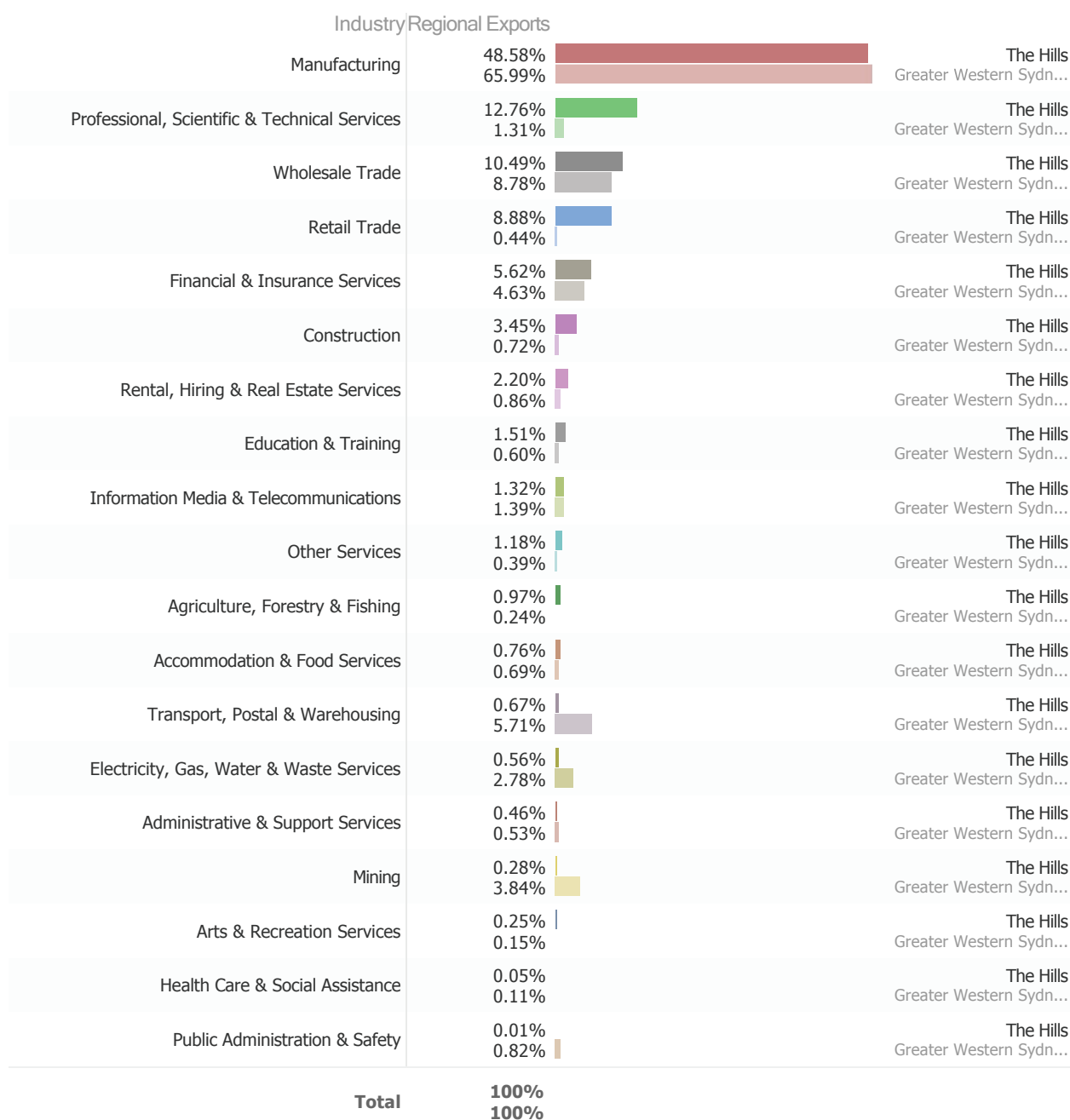
Regional Exports by Industry

The value of regional exports generated by the The Hills economy is estimated at \$5.186 billion.

The Hills

Regional Exports by Industry

► All Industries - All Zones



Regional Imports by Industry

The value of intermediate goods and services imported into The Hills by local industry sectors is estimated at \$4.609 billion.

The Hills

Regional Imports by Industry

► All Industries - All Zones

Industry	Regional Imports	
Manufacturing	61.85%	The Hills
	68.08%	Greater Western Sydn...
Construction	7.71%	The Hills
	4.23%	Greater Western Sydn...
Professional, Scientific & Technical Services	5.22%	The Hills
	2.79%	Greater Western Sydn...
Wholesale Trade	5.22%	The Hills
	4.01%	Greater Western Sydn...
Retail Trade	3.64%	The Hills
	1.79%	Greater Western Sydn...
Rental, Hiring & Real Estate Services	3.11%	The Hills
	3.00%	Greater Western Sydn...
Accommodation & Food Services	2.27%	The Hills
	1.58%	Greater Western Sydn...
Financial & Insurance Services	1.78%	The Hills
	2.00%	Greater Western Sydn...
Information Media & Telecommunications	1.62%	The Hills
	1.46%	Greater Western Sydn...
Administrative & Support Services	1.13%	The Hills
	1.12%	Greater Western Sydn...
Health Care & Social Assistance	1.01%	The Hills
	1.00%	Greater Western Sydn...
Other Services	0.99%	The Hills
	0.77%	Greater Western Sydn...
Education & Training	0.90%	The Hills
	0.89%	Greater Western Sydn...
Transport, Postal & Warehousing	0.83%	The Hills
	2.77%	Greater Western Sydn...
Electricity, Gas, Water & Waste Services	0.73%	The Hills
	1.01%	Greater Western Sydn...
Agriculture, Forestry & Fishing	0.57%	The Hills
	0.39%	Greater Western Sydn...
Public Administration & Safety	0.56%	The Hills
	1.75%	Greater Western Sydn...
Arts & Recreation Services	0.52%	The Hills
	0.42%	Greater Western Sydn...
Mining	0.33%	The Hills
	0.94%	Greater Western Sydn...
Total	100%	
	100%	

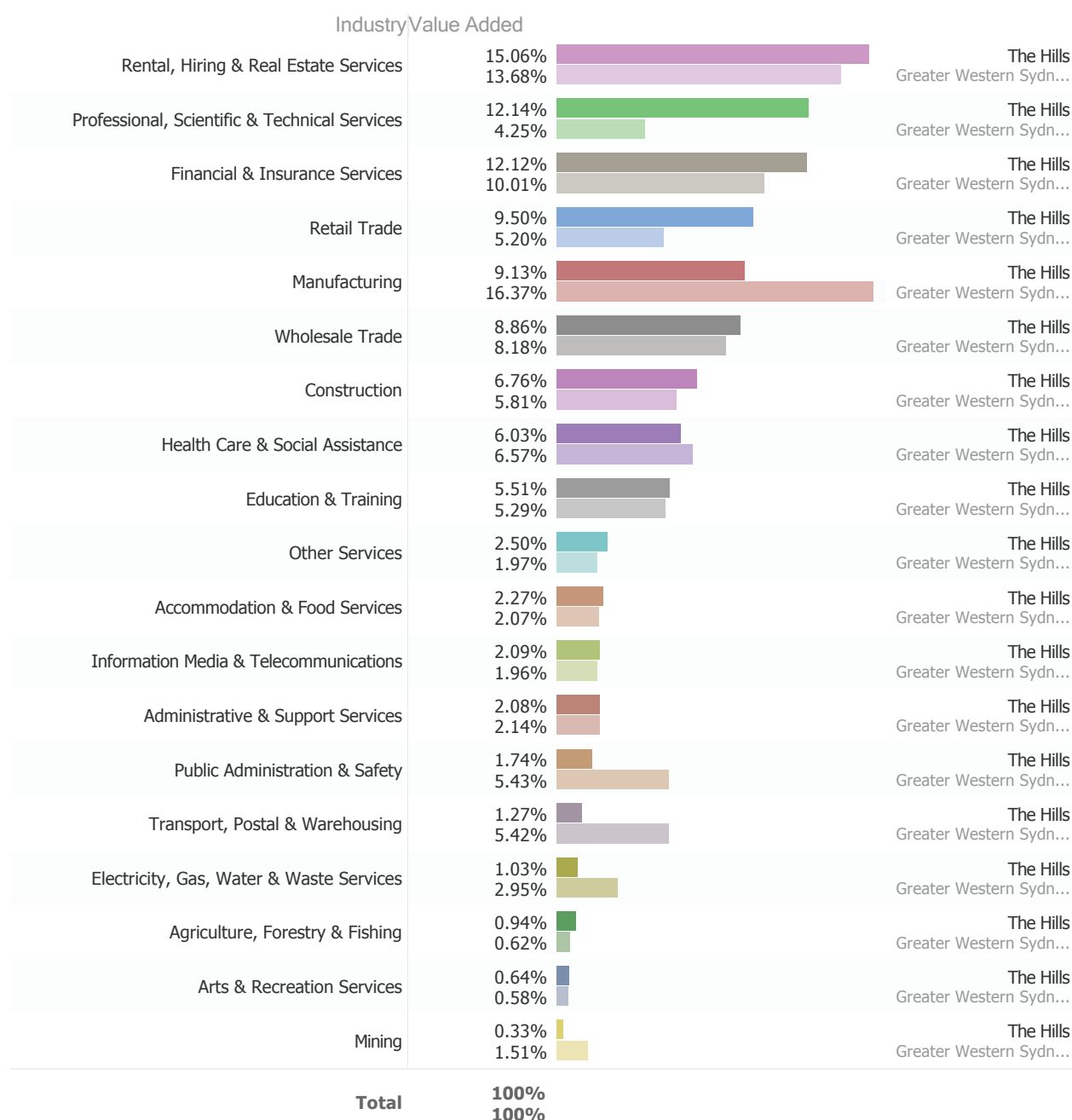
Value-Added by Industry

The total value added by the The Hills economy is estimated at \$7.597 billion. The Hills represents 8.54 % of the \$88.904 billion value added in Greater Western Sydney, 1.71 % of the \$444.580 billion value added in New South Wales and 0.53 % of the \$1.426 trillion value added in Australia.

The Hills

Value-Added by Industry

► All Industries - All Zones



Gross Regional Product

The Hills' Gross Regional Product is estimated at \$8.353 billion. The Hills represents 8.57 % of Greater Western Sydney's GRP of \$97.431 billion, 1.75 % of New South Wales' Gross State Product (GSP) of \$476.434 billion and 0.55 % of Australia's GRP of \$1.521 trillion.

The Hills

Gross Regional Product

GRP Expenditure Method	The Hills	Greater Western Sydney
Household Consumption	\$7,277.960 M	\$82,418.335 M
Government Consumption	\$2,064.873 M	\$22,931.101 M
Private Gross Fixed Capital Expenditure	\$2,458.780 M	\$26,570.179 M
Public Gross Fixed Capital Expenditure	\$706.058 M	\$7,841.010 M
Gross Regional Expenses	\$12,507.671 M	\$139,760.626 M
plus Regional Exports	\$5,212.353 M	\$55,391.716 M
minus Domestic Imports	-\$6,942.170 M	-\$69,851.783 M
minus Overseas Imports	-\$2,424.937 M	-\$27,869.457 M
GRP	\$8,352.917 M	\$97,431.102 M
Population	169,872	1,923,694
Per Capita GRP	\$49,172	\$50,648
Per Worker GRP	\$146,929	\$158,367

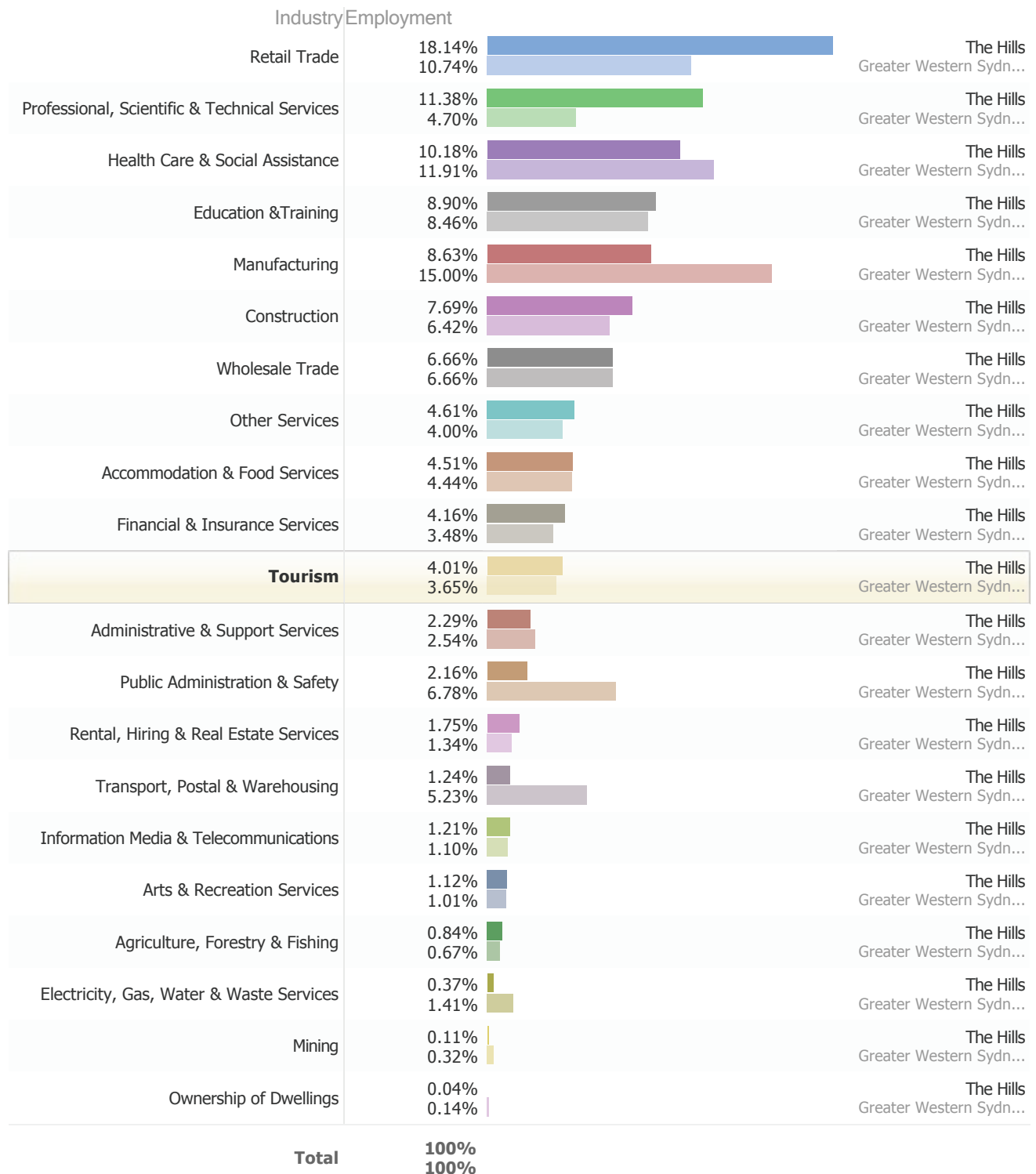
Tourism Employment

Of the 56,850 people working in The Hills it is estimated that 2,281 jobs are supported by tourism

The Hills

Tourism Employment

► All Industries



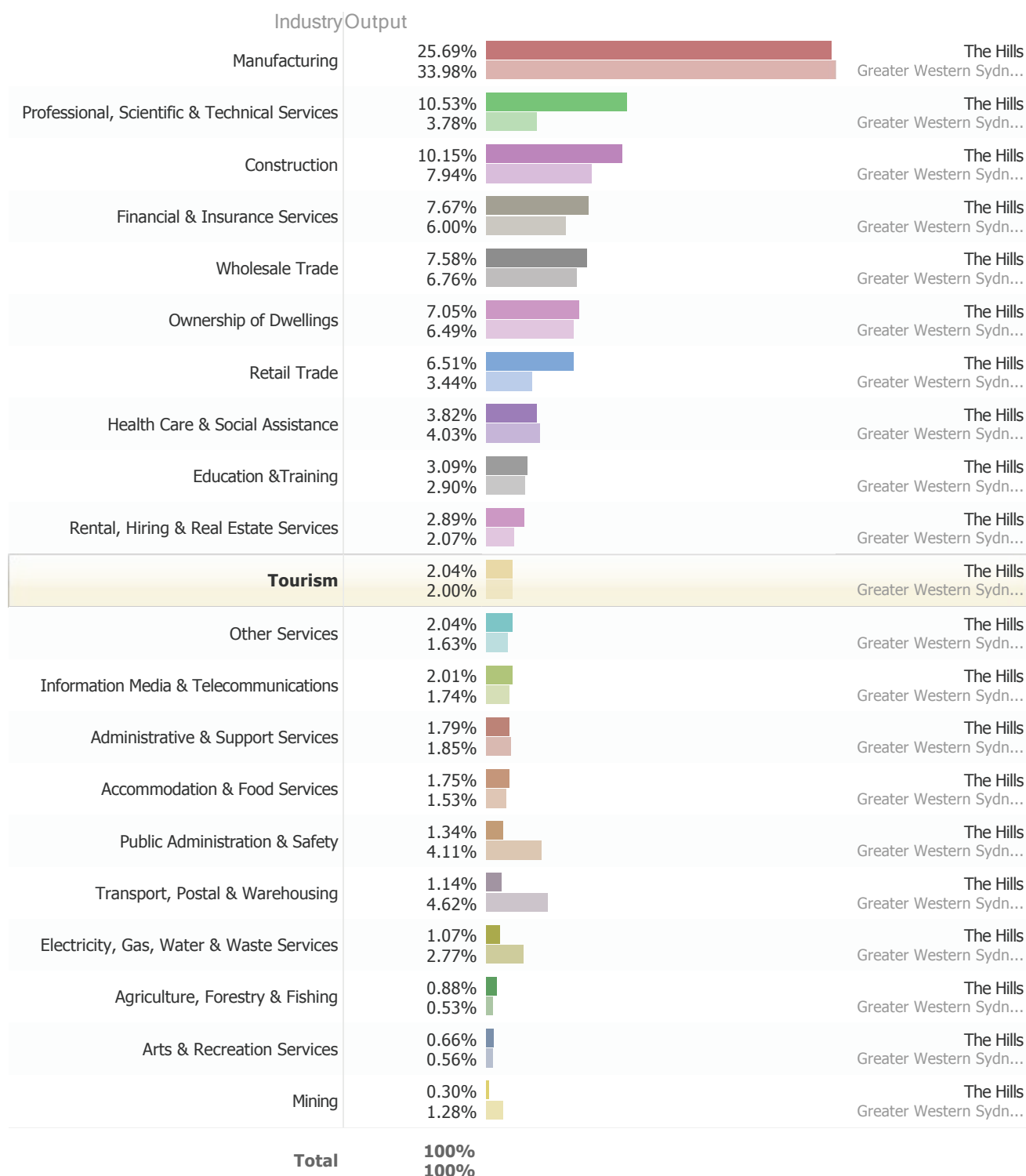
Tourism Output

Of the 56,850 people working in The Hills it is estimated that 2,281 jobs are supported by tourism

The Hills

Tourism Output

► All Industries



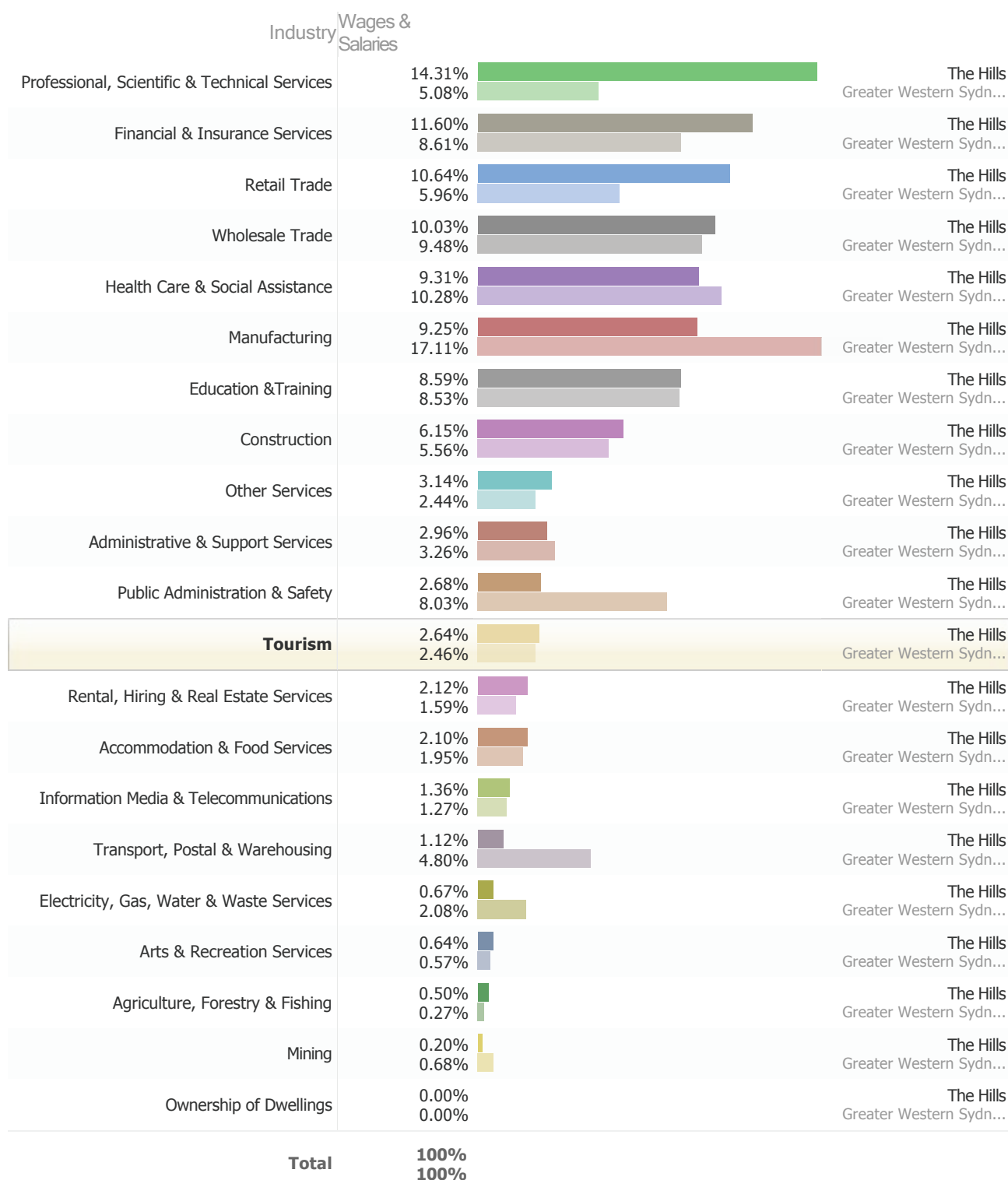
Tourism Wages and Salaries

Of the total wages & salaries paid by businesses and organisations to workers in The Hills of \$4.074 billion it is estimated that tourism contributes \$107.480 million.

The Hills

Wages & Salaries

► All Industries



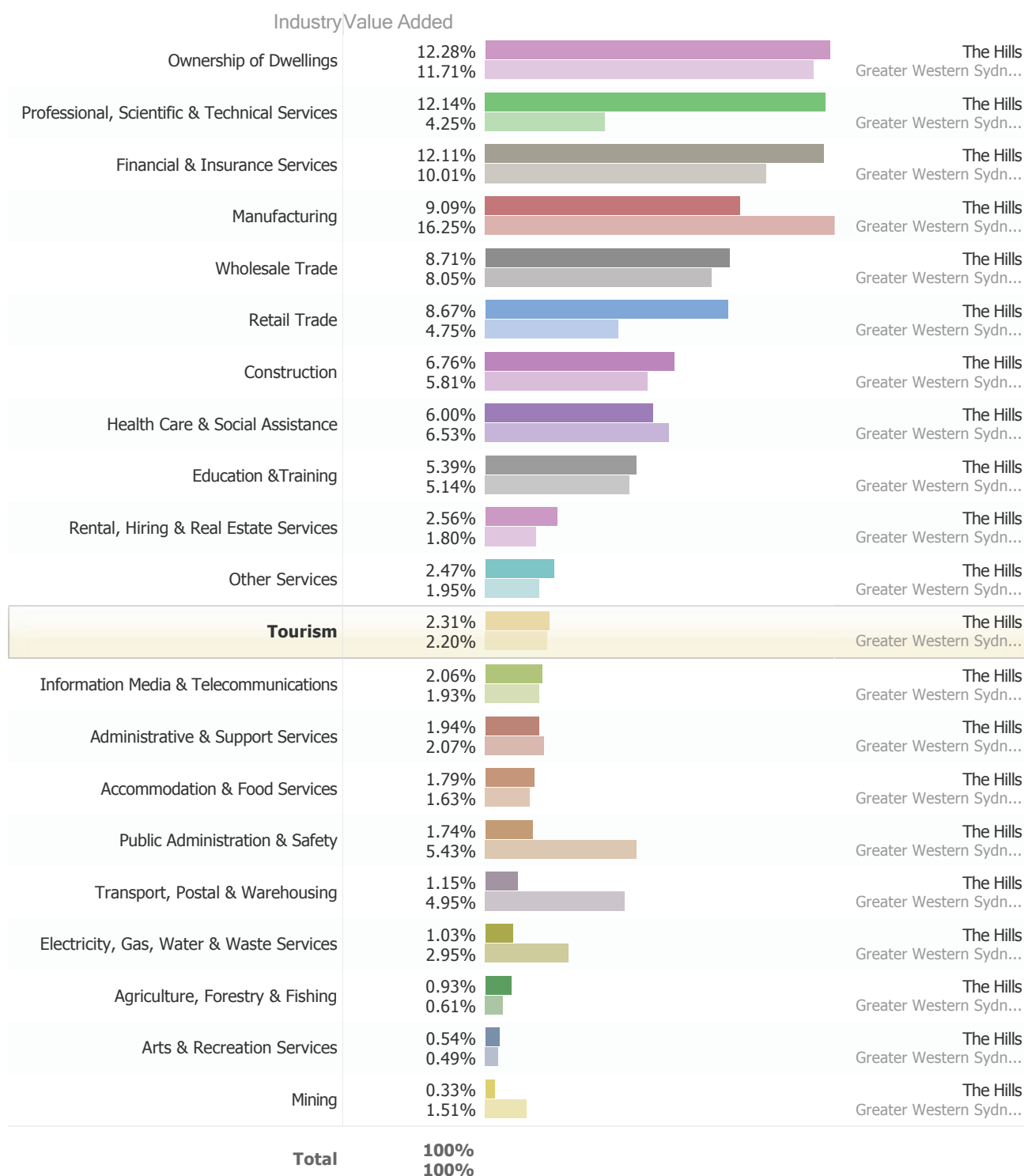
Tourism Value-Added

Of the total value added in the The Hills economy of \$7.597 billion it is estimated that tourism contributes \$175.668 million or 2.31 % percent.

The Hills

Tourism Value-Added

► All Industries

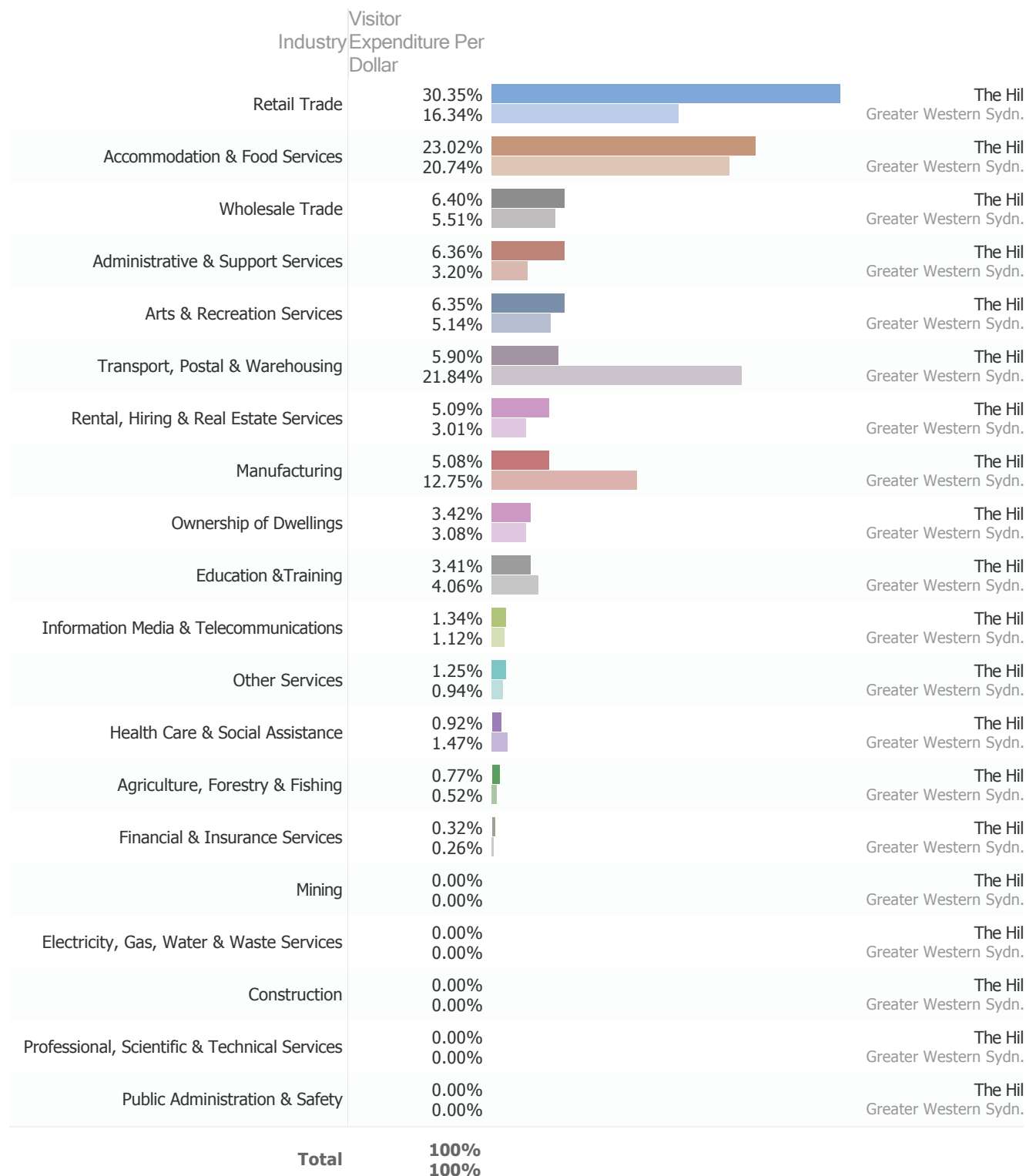


Tourism Visitor Expenditure Per Dollar

The Hills

Tourism Expenditure Per Dollar

► All Industries



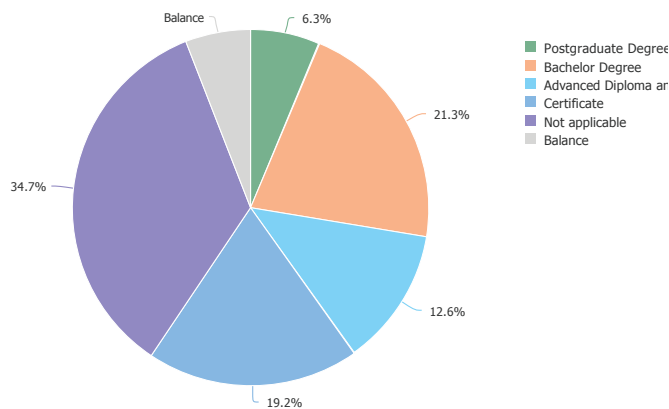
Workers Profile (Working in The Hills)

It is estimated that 56,850 people work in The Hills.

The Hills

Workers (Working in The Hills) - by Education

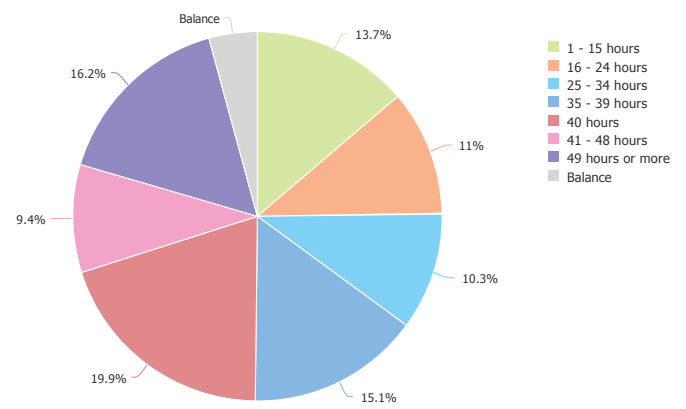
► All Industries



The Hills

Workers (Working in The Hills) - by Hours Worked

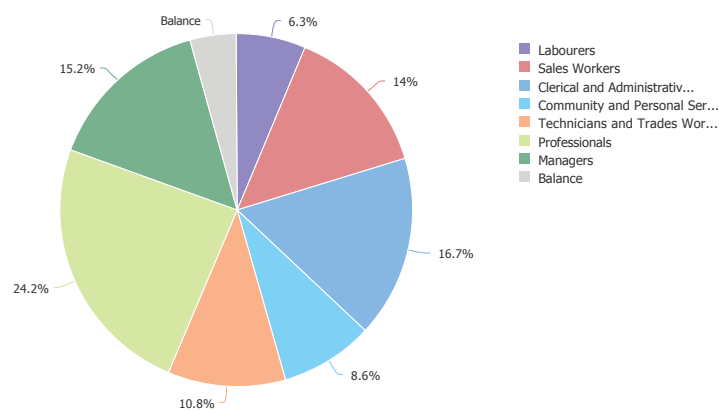
► All Industries



The Hills

Workers (Working in The Hills) - by Occupation

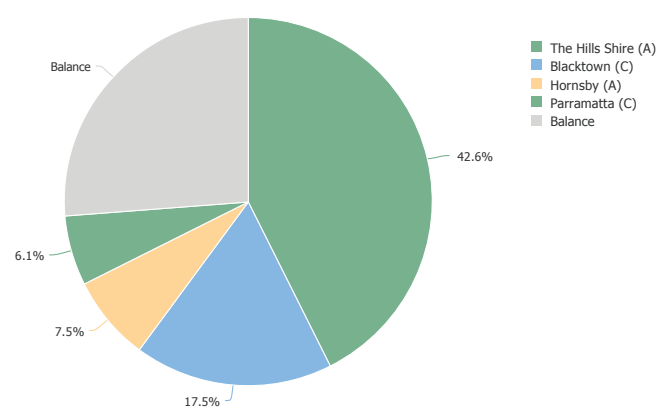
► All Industries



The Hills

Workers (Working in The Hills) - by Place of Usual Residence

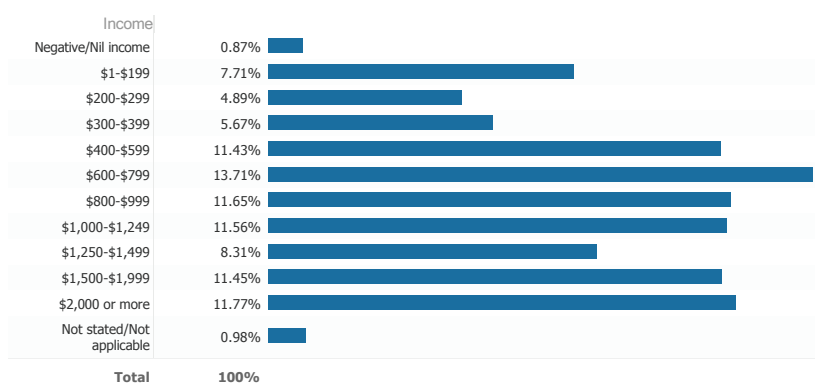
► All Industries



The Hills

Workers (Working in The Hills) - by Income

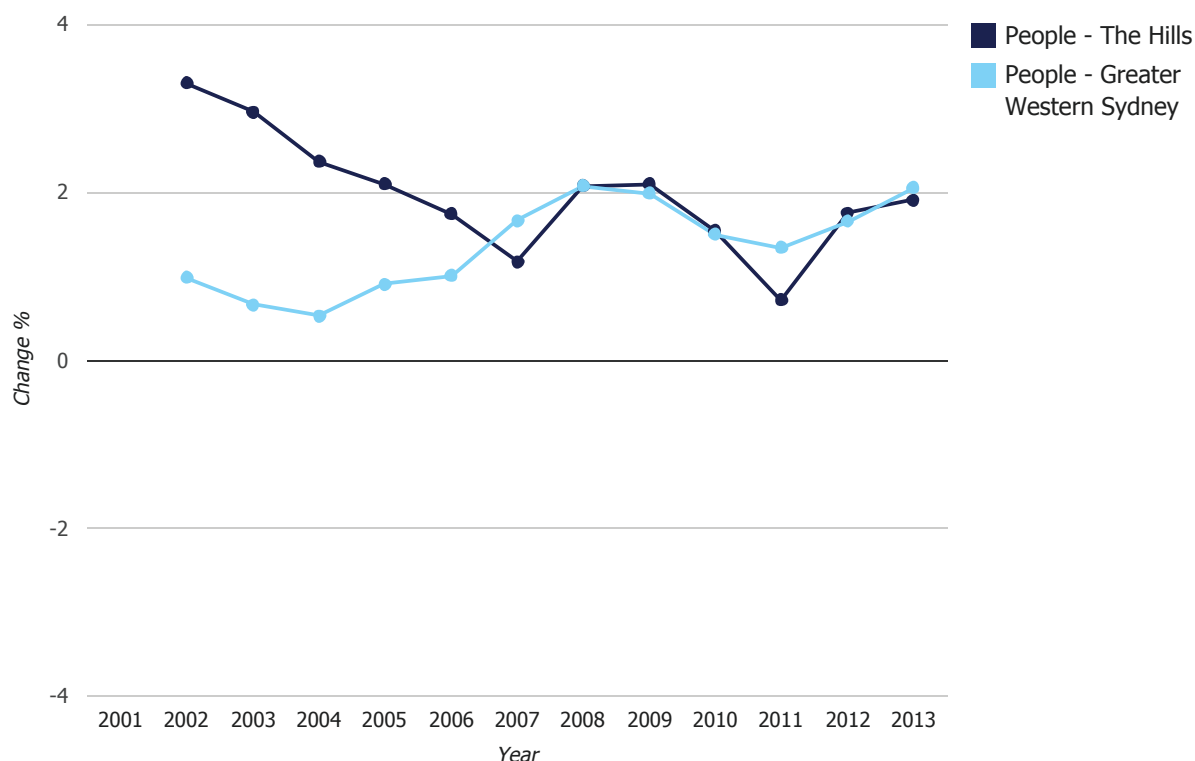
► All Industries



Trends - Population

The Hills

Population % Change



Definition: Estimated resident population (ERP) is the official Australian Bureau of Statistics (ABS) measure of the population of areas in Australia according to a usual residence population concept. Usual residence is that place where each person has lived or intends to live for six months or more from the reference date for data collection. It refers to all people, regardless of nationality or citizenship, who usually live in Australia, with the exception of foreign diplomatic personnel and their families. It includes usual residents who are overseas for less than 12 months. It excludes overseas visitors who are in Australia for less than 12 months.

In census years, ERPs are derived using data from the Census of Population and Housing and Post Enumeration Survey, with an allowance for the number of residents temporarily overseas (RTOs) at the census date. For post-censal years ERPs are calculated using mathematical models and indicator data such as dwelling approvals, Medicare enrolments managed by the Australian Government Department of Human Services and Australian Electoral Roll enrolments managed by the Australian Electoral Commission. Population estimates for Australia and the states and territories are updated by adding to the estimated population at the beginning of each period the components of natural increase (births minus deaths, on a usual residence basis) and net overseas migration.

Estimates of the resident populations as at 30 June are released annually for all Statistical Areas Level 2 (SA2s) and Local Government Areas (LGAs) in Australia. The estimates are generally revised 12 months later and final estimates are available after the following census.

Source: Australian Bureau of Statistics, Regional Population Growth, Cat. 3218.0 (2012-13 data was released on 3 April

Trends - Jobs

The Hills

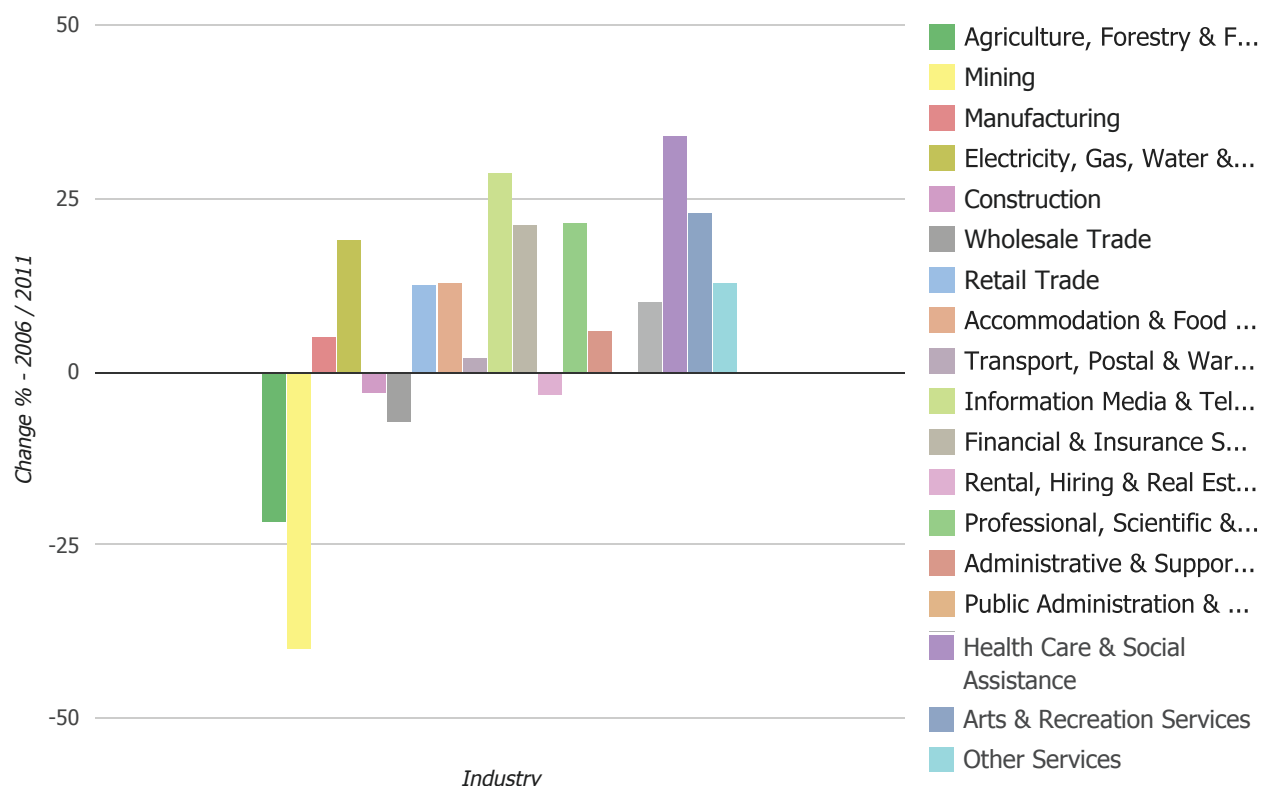
Jobs

Jobs	2006	The Hills 2011
Agriculture, Forestry & Fishing	621	486 -21.7% ↓
Mining	107	64 -40.2% ↓
Manufacturing	4,678	4,924 5.3% ↑
Electricity, Gas, Water & Waste Services	179	213 19.0% ↑
Construction	4,521	4,371 -3.3% ↓
Wholesale Trade	4,163	3,852 -7.5% ↓
Retail Trade	10,028	11,294 12.6% ↑
Accommodation & Food Services	2,882	3,255 12.9% ↑
Transport, Postal & Warehousing	762	778 2.1% ↑
Information Media & Telecommunications	540	696 28.9% ↑
Financial & Insurance Services	1,952	2,367 21.3% ↑
Rental, Hiring & Real Estate Services	1,091	1,053 -3.5% ↓
Professional, Scientific & Technical Services	5,326	6,469 21.5% ↑
Administrative & Support Services	1,319	1,397 5.9% ↑
Public Administration & Safety	1,229	1,229 .0% ↓
Education & Training	4,689	5,171 10.3% ↑
Health Care & Social Assistance	4,333	5,816 34.2% ↑
Arts & Recreation Services	621	763 22.9% ↑
Other Services	2,346	2,652 13.0% ↑
Total	51,387	56,850

Trends - Jobs

The Hills

% Change in Jobs (2006 - 2011)



Definition: The employment data presented above represents the number of people employed by businesses/organisations in each of the industry sectors in a defined region. The employment data presented is destination of work data; no inference is made as to where people in a defined region reside. The employment data represents total numbers of employees without any conversions to full-time equivalence.

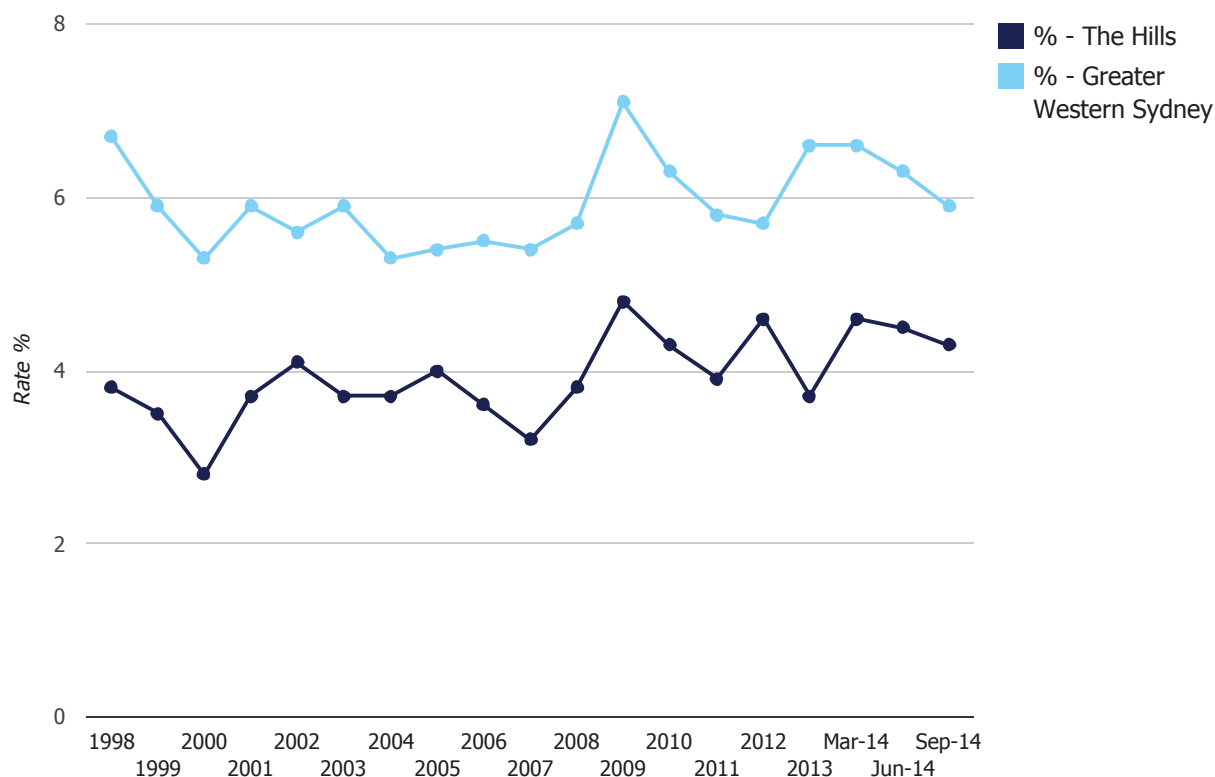
Place of Work is coded from the workplace address question on the Census form and relates to where the person worked in the week prior to Census Night. The industry sectors describe the industries in which employed people aged 15 years and over work. Industries are coded using the Australian and New Zealand Standard Industry Classification (ANZSIC) 2006. A person's industry of employment was classified based on responses to a range of Census questions which ask for a description of the business, and the main goods produced, or main services provided. The name of the business, the employed person's occupation and main tasks and duties, may also have assisted the classification of industry of employment.

Source: Australian Bureau of Statistics, 2006 & 2011 Censuses of Population and Housing

Trends - Unemployment Rate

The Hills

Unemployment Rate



Definition: The Small Area Labour Markets (SALM) data has been compiled by Australian Government Department of Employment. SALM data incorporates three primary datasets:

1. Centrelink data on people in receipt of Newstart or Youth Allowance (Other), by postcode (not including people in receipt of the Community Development Employment Projects Participant Supplement)
2. ABS Labour Force Survey data at the ABS Labour Force Region level
3. ABS Census of Population and Housing labour force data at the Statistical Local Area level, Statistical Area 2 level and Local Government Area level.

The estimates presented have been smoothed by Department of Employment using a four-quarter average to minimise the variability inherent in the estimates at the Statistical Local Area level, Statistical Area 2 level and Local Government Area level.

For states, territories and other large regions, unemployment rate data from the Australian Bureau of Statistics (ABS) Labour Force Survey is presented. The Labour Force Survey is based on a multi-stage area sample of private dwellings (currently approximately 26,000 houses, flats, etc.) and a list sample of non-private dwellings (hotels, motels, etc.), and covers approximately 0.32% of the civilian population of Australia aged 15 years and over.

Source: Department of Employment Small Area Labour Markets (SALM). (September Quarter 2014 was released in December 2014. December Quarter 2014 data will be available in March 2015.)

Trends - Business Counts by Staff

The Hills

Business Counts (Staff)

► All Industries

Business Counts (Staff)		The Hills	
	Jun-11	Jun-12	Jun-13
Non employing	15,698	15,762 .4% ↑	15,145 -3.9% ↓
1-4	8,289	8,310 .3% ↑	8,013 -3.6% ↓
5-19	1,979	2,083 5.3% ↑	2,127 2.1% ↑
20-199	428	429 .2% ↑	484 12.8% ↑
200+	23	23 .0% ↓	29 26.1% ↑
Total	26,417	26,607	25,798

Trends - Business Counts by Turnover

The Hills

Business Counts (Turnover)

► All Industries

Business Counts (Turnover)		The Hills			
	Jun-09	Jun-10	Jun-11	Jun-12	Jun-13
Zero to \$50k	7,431	8,089 8.9% ↑	8,178 1.1% ↑	7,977 -2.5% ↓	7,323 -8.2% ↓
\$50k to less than \$100k	4,460	4,960 11.2% ↑	4,688 -5.5% ↓	4,807 2.5% ↑	4,732 -1.6% ↓
\$100k to less than \$200K	4,413	4,370 -1.0% ↓	4,524 3.5% ↑	4,609 1.9% ↑	4,329 -6.1% ↓
\$200k to less than \$500k	4,319	4,451 3.1% ↑	4,671 4.9% ↑	4,699 .6% ↑	4,701 .0% ↑
\$500k to less than \$2m	2,971	3,000 1.0% ↑	3,135 4.5% ↑	3,196 1.9% ↑	3,307 3.5% ↑
\$2m or more	1,201	1,230 2.4% ↑	1,269 3.2% ↑	1,336 5.3% ↑	1,396 4.5% ↑
Total	24,795	26,100	26,465	26,624	25,788

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