

City of Parramatta's Visitor Economy 2025

A project for the City of Parramatta

September 2025

Ingenium Research



ABOUT THIS REPORT

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POLICY CONTEXT:

Parramatta's visitor economy is shaped by several Council strategies that guide its cultural, social and economic potential. [Parramatta 2050](#) and the City's [Destination Management Plan \(2019–2024\)](#) emphasises attracting more visitors and enhancing their experiences. The City's [Cultural Strategy](#), [Night City Framework](#) and draft [Events and Festivals Strategy \(2025–2030\)](#) reinforce the city's ambition to foster a vibrant, inclusive and creative night-time offering. Major infrastructure projects, including the construction of [Powerhouse Parramatta](#), the redevelopment of [Riverside Theatres](#), and creation of the [Civic Link](#) green and activated pedestrian spine, further support this. This report provides a data-led foundation to inform the City of Parramatta's next generation of policy and investment decisions to strengthen its appeal as a leading visitor destination.

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City of Parramatta acknowledges the Traditional Owners of this land, the Dharug people.



GLOSSARY OF TERMS

Term	Definition
ABS	Australian Bureau of Statistics - the national provider of official government statistics.
ANZSIC	Australian and New Zealand Standard Industrial Classification - a standardised system used to classify businesses and other organisations based on their main economic activity. It provides a common framework for collecting, organising and comparing industry-related data.
ANZSCO	Australian and New Zealand Standard Classification of Occupations - a standardised system used to classify jobs and occupations based on the type of work performed and the skills required. It provides a common framework for collecting, organising and comparing occupation-related data.
LGA	Local Government Area - the municipal geographic area of a local council.
SA2	Statistical Area 2 - An ABS geographic area classification defined using the Census of Population and Housing. SA2s are functional areas that represent a community that interacts together socially and economically. They often align with Suburb and Locality boundaries to improve the geographic coding of data to these areas. In major urban areas SA2s often reflect one or more related suburbs. SA2 are used rather than suburb because Parramatta's SA2s boundaries align with the LGA boundary, whereas suburbs cross LGA boundaries. Further details are provided on page 7.

Economic activity definitions

Businesses	Actively trading business(es) recorded in the Australian Bureau of Statistics Business Register (ABSBR) as of 30th June in each reporting year.
Employment	The number of employees associated with a business.
Value Added (\$m)	Value added is the amount of value the business creates itself, after subtracting the cost of the raw materials or services it used.
Output (\$m)	Output is the total value of everything a business produces or sells.

Consumer spend definitions

Accommodation	Comprises Hotel and Motel Accommodation, Caravan Parks., Direct online bookings, Online accommodation aggregators, Holiday rentals
Discretionary retail	Comprises Department Stores, Clothing & Accessories and Other Discretionary Retail
Food retailing	Comprises Groceries and Other Food Retailing and Supermarkets
Private Transport	Comprises Petrol Stations, Ride Sharing Services, Parking Lots, Taxis and Limousines, Water Taxis and Ferries
Resident	Someone who resides within the Parramatta LGA.
Temporal breakdown	Day is defined as the period from 6am to 6pm. Night is defined as the period from 6pm to 6am.
Tourism and entertainment	Comprises Attractions, Events and Recreation, Breweries and Wineries, Cafes, Pubs, Taverns and Bars, Restaurants, Takeaway and Fast Food Outlets
Visitor	Someone who resides outside the Parramatta LGA – either in New South Wales, wider Australia or internationally.

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Executive summary

The City of Parramatta is rapidly growing into a major destination for domestic and international visitors. From business travel and recreation to cultural festivals and events, Parramatta's visitor economy is diverse. With key attractors such as Parramatta Park, CommBank Stadium, and the Riverside Theatres, alongside increasing hotel stock and hospitality venues, the city is set to strengthen its tourism offer.

Overall position

- Parramatta is a **fast-growing visitor economy** in Greater Sydney, outpacing Blacktown, Liverpool and Inner West in jobs and economic output.
- Parramatta represents **~6% of Greater Sydney's visitor economy** in jobs and value added
- **Over 60% of local consumer spending** comes from visitors, with restaurants, cafes, and retail as major drivers.

Headline figures (2023/24)



Businesses
2,411
+20% since 2019/20



Employees
20,310
+4.5% p.a. since 2018/19



Consumer spend
\$3.2bn
(May 2024 to May 2025)



Consumer spend from visitors
\$1.9bn (60%)
(May 2024 to May 2025)



Economic output
\$3.3bn
5.8% of Parramatta's economy

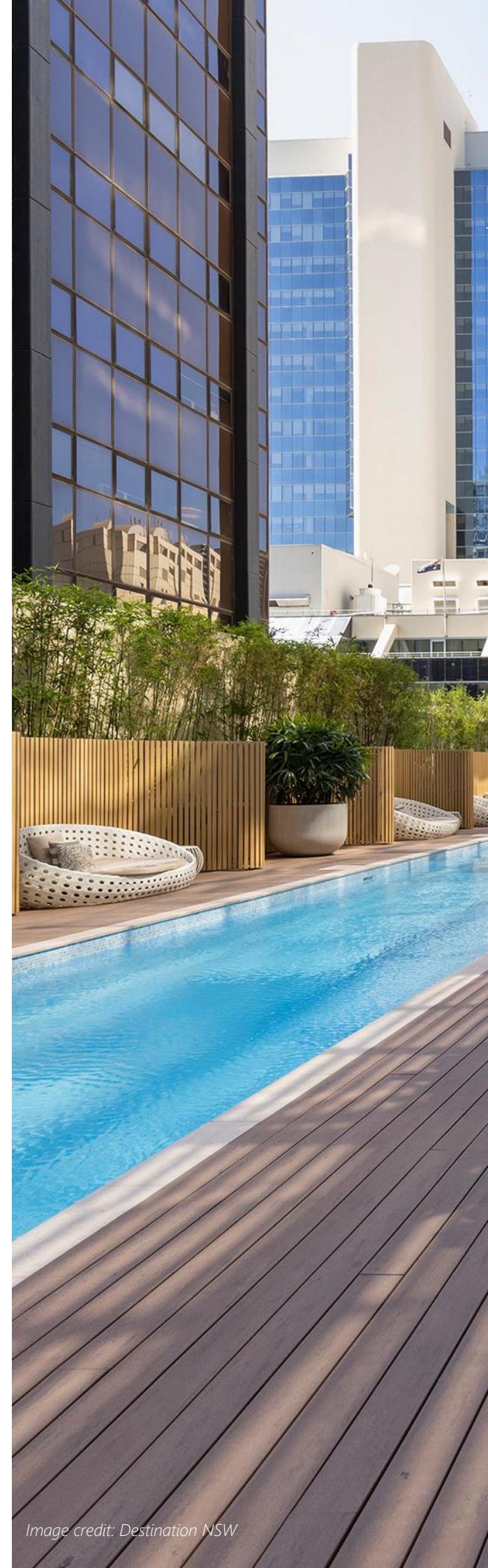


Value added
\$1.6bn
5.7% of Parramatta's economy

Key trends

- **Improving:** Overnight stays, food & beverage sector, accommodation, heritage and recreation.
- **Declining/flat:** Retail employment share, store-based retail business growth.

This report dives into these findings to help Council strengthen Parramatta's visitor economy appeal.



Introduction

Parramatta's visitor economy plays an important role in driving the City's cultural, social, and economic vibrancy.

The visitor economy comprises both overnight tourists and day visitors, including those who travel for leisure, work, events, dining, shopping, or other purposes - whether from across Greater Sydney, New South Wales, interstate, or overseas. In Parramatta, major projects like Powerhouse Parramatta, Civic Link, and the new light rail are helping to reshape the city's visitor economy, as both a destination, and a centre of government and business activity.

Parramatta's [Economic Development Strategy](#) and [Destination Management Plan](#) (2019-2024) both highlight the importance of attracting more visitors and deepening their engagement with the city's cultural, retail, hospitality and public spaces. But to plan effectively, Council needs a clearer understanding of what the visitor economy currently looks like and how it's changing.

This report provides a data-led view of Parramatta's visitor economy, including:

- **Businesses** – types of businesses and how this is changing over time
- **Workforce** – employment trends in key visitor-facing sectors broken down by occupation and demographics
- **Visitation and spend** – how many visitors does Parramatta attract, how much do they spend and on what
- **Economic contribution** – value added, output and the sector's contribution to Gross Regional Product

These insights will help the City of Parramatta shape evidence-based strategies to support sustainable growth in its visitor economy.



Background

What is the visitor economy?

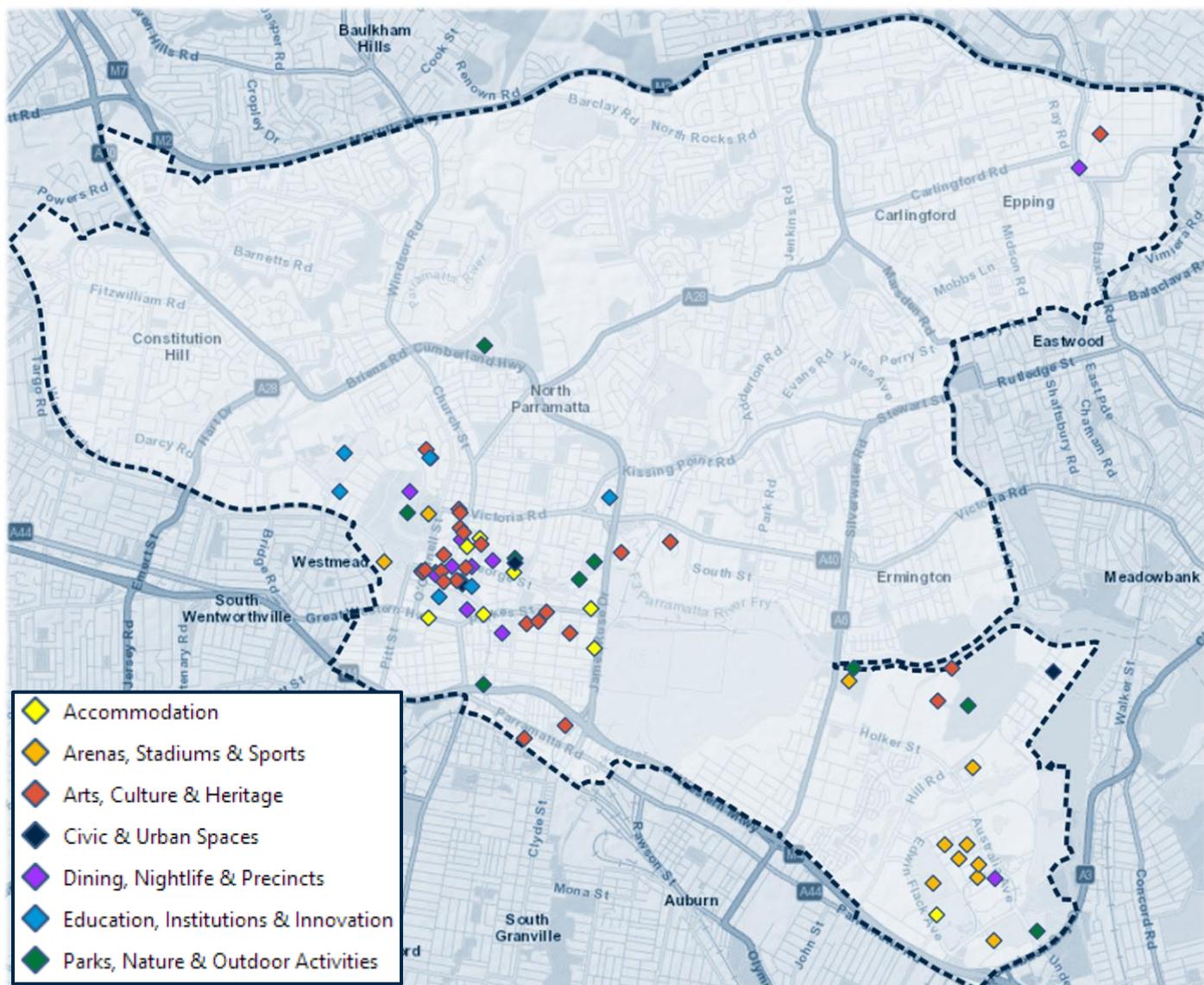
The *visitor economy* refers to the wide range of economic activity that occurs as a result of people travelling to and spending time in a place away from their usual environment. This includes tourists, business travellers, event attendees, day-trippers, and even visiting friends and relatives.

It goes beyond just tourism operators – capturing spending on accommodation, food and drink, entertainment, retail, transport, cultural activities, and events. Whether someone is eating at a local café, staying overnight in a hotel, shopping at a market, or attending a festival, their activity supports local jobs and businesses.

A healthy visitor economy delivers more than just dollars, it helps support vibrant main streets, brings life to public spaces, sustains local cultural and hospitality sectors, and contributes to the identity and appeal of a place for both residents and visitors. For this report, an industry based definition is utilised, with details provided in the Appendix.

Where are Parramatta's key attractions?

The map below highlights some of Parramatta's key attractions that contribute to the visitor economy.





Businesses

Visitor-facing businesses are the foundation of the visitor economy. Understanding the number, type, trends and distribution of these businesses across Parramatta helps identify strengths and opportunities to enhance the visitor experience.

Key metric(s): Number of businesses – by industry

In 2023/24, Parramatta had 2,411 businesses servicing the visitor economy – around 7% of the local business base. Since 2018/19, this sector has grown at an average annual rate of 4.0%, broadly in line with the wider Parramatta economy (4.1% p.a.). However, between 2019/20 and 2022/23, visitor economy businesses grew at a faster pace than the wider business base highlighting a growing supply of visitor-based services. It is only in the last year where the wider economy has caught up.

The industries in Figure 2 contribute to the visitor economy. The largest of these are food and beverage activities (1,214 businesses) and store-based retailing (830). Food and beverage activities have grown in line with the wider business base (4.1% p.a. since 2018/19), while store-based retailing has grown at a slower pace (2.5% p.a.). The smaller sub-sectors – which perhaps contribute more directly to Parramatta's appeal as a destination – have grown at a much faster pace than the wider economy. Most notably, accommodation businesses have increased by 9.5 p.a. since 2018/19, reflecting the city's growing profile as an overnight destination.

Key findings for Parramatta

- In 2023/24 over 2,400 businesses serviced the visitor economy (around 7% of all businesses).
- Food and beverage services and store-based retailing represent 85% of visitor economy businesses.

Trend direction:

- The number of visitor economy businesses grew faster (+20%) than the total business base (+16%) between 2019/20 and 2022/23.
- The number of accommodation (+58%), creative & performing arts (+44%), and sports & recreation (40%) businesses have grown strongly since 2018/19.

Implications for Strategy

Council could leverage the rapid growth in accommodation and recreation to attract multi-day stays, while supporting retail adaptation (through the likes of extended hours, event-linked promotions, and experiential in-store offers) to complement hospitality and entertainment strengths.

Figure 1: Indexed trend in business growth (2018/19 = 1)

Source: Australian Bureau of Statistics Counts of Australian Businesses, including Entries & Exits

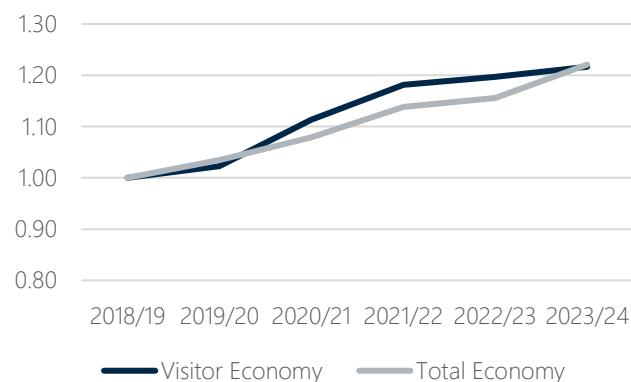
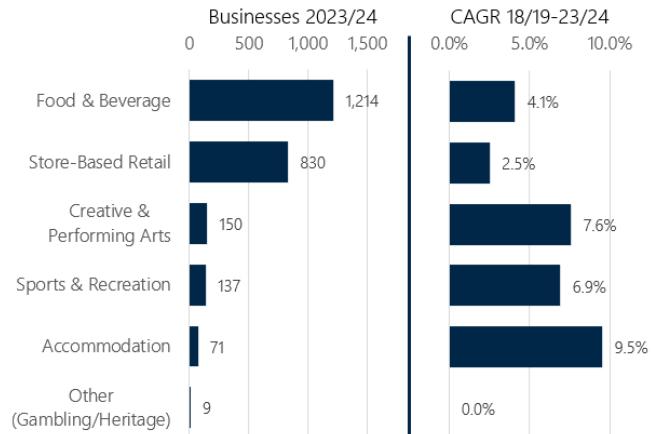


Figure 2: visitor economy 2023/24 and CAGR since 18/19

Source: Australian Bureau of Statistics Counts of Australian Businesses, including Entries & Exits



Workforce

The visitor economy creates local jobs. Understanding workforce trends and demographics helps the City of Parramatta and partners plan for future skills needs and provide appropriate support, where needed.

Key metric(s): Number of employees – by industry, occupation and demographic

Businesses servicing the visitor economy in Parramatta employed 20,315 people in 2023/24. Employment in this sector has grown at a compound annual growth rate (CAGR) of 4.5% since 2018/19 – outpacing the wider Parramatta economy, which grew by just 1.1% per year. This growth has been particularly strong since the emergence from the pandemic restrictions – particularly in food and beverage services businesses.

As with business counts, employment has also increased notably in accommodation and sport and recreation, reinforcing the growing importance of Parramatta as a key destination.

Heritage activities, while smaller in size, recorded the highest growth rate at 22% per annum, followed by sport and recreation (10%), and accommodation (7%).

Food and beverage employment grew in line with overall visitor economy employment (5% per annum), while gambling activities, creative and performing arts, and store-based retail saw slower growth. Retail was the only segment in the visitor economy to perform worse than the wider economy, suggesting a shift in demand towards services and experiences rather than goods. In nearby Blacktown, however, retail employment has performed well, growing 4% per annum over the same period, while food and beverage has declined 2% - highlighting different employment trajectories for each area.

Figure 3: Visitor economy employment 2018/19 to 2023/24

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id

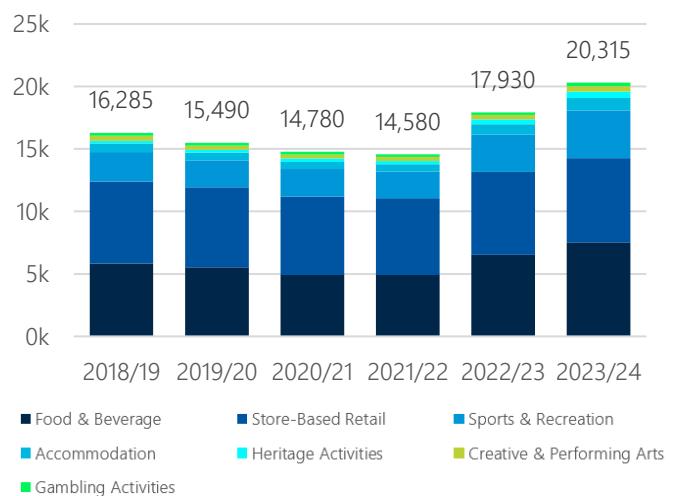
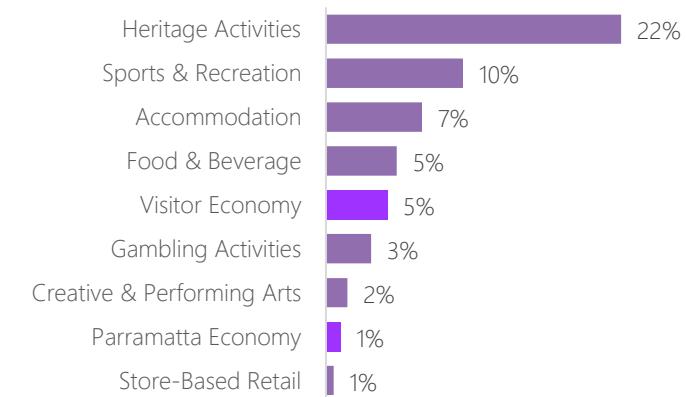


Figure 4: Compound annual growth rate 2018/19 to 2023/24

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id

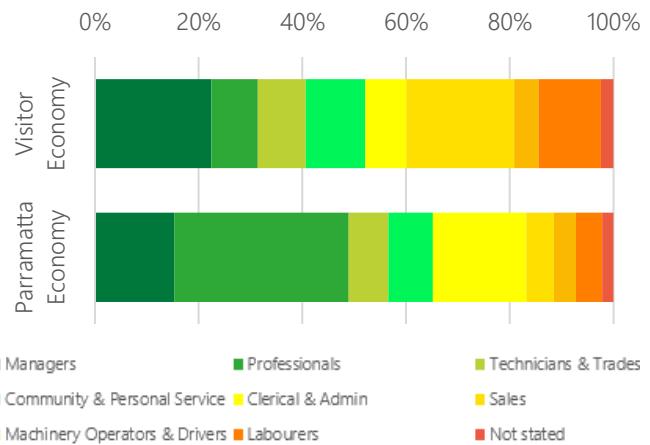


Occupations

Employees working in businesses that service the visitor economy in Parramatta are more likely to be managers or sales workers compared to the wider economy. These two occupations are more prominent across visitor-serving industries such as hospitality, retail, and accommodation. Other roles within the visitor economy are more evenly spread, showing a relatively balanced distribution across service, administrative, and operational categories. In contrast, the wider Parramatta economy has a high proportion of professionals and clerical or administrative workers, reflecting the city's government, finance, and corporate services strengths.

Figure 5: 2023/24 employment by occupation

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id



Demographics

Employees in Parramatta's visitor economy are slightly more likely to be male, in contrast to the broader economy, which has a higher share of female workers. The visitor economy workforce is notably younger, with 29% under 25, compared to just 10% in the wider economy. It has a smaller proportion of workers aged 25–54, though this is the largest age group. Older workers (55+) make up a smaller share.

Part-time work is much more common in the visitor economy, with 64% of workers in part-time roles – compared to 39% across the wider Parramatta workforce.

Implications for Strategy

Strong job growth suggests the sector is rebounding well post-pandemic – particularly in hospitality and recreation – but the heavy reliance on part-time workers (64%) could pose workforce stability challenges.

The younger age profile creates opportunities for skills development programs but also indicates higher staff turnover.

Retail under-performance compared with the wider economy suggests a shift towards experience-driven visitation – marketing should lean into dining, entertainment, and events.

Table 1: Demographics of the visitor economy workforce

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id

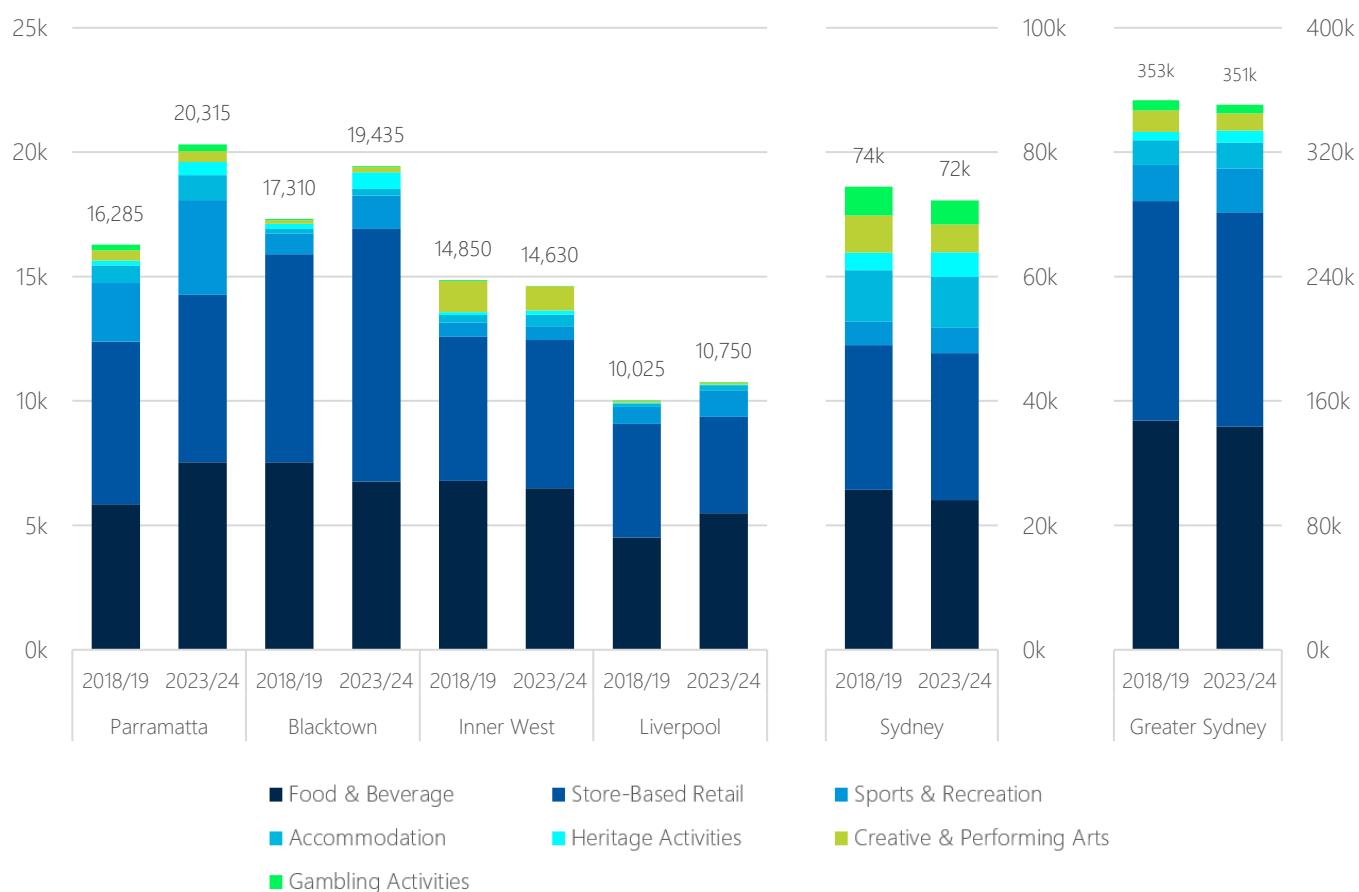
Demographic	Visitor Economy	Parramatta Economy
Female Male	49% 51%	52% 48%
Aged 15-24	29%	10%
Aged 25-54	57%	70%
Aged 55+	13%	20%
Works part-time	64%	39%

Benchmarking Parramatta's visitor economy employment

Parramatta's visitor economy accounts for 5.8% of Greater Sydney's visitor economy in 2023/24 – growing from 4.6% in 2018/19 – a higher proportion than all benchmark LGAs, except for Sydney (20.6% in 2023/24). In terms of growth, Parramatta outperformed all benchmark LGAs in visitor economy employment between 2018/19 and 2023/24. With a compound annual growth rate of 4.5% p.a., it leads Blacktown (2.3%), Liverpool (1.4%), and the Inner West, which declined by 0.3%. In comparison, Greater Sydney declined 0.2% p.a. over the same period. This sustained job creation highlights Parramatta's rising status as a key visitor destination, and makes progress towards the City's target to generate an additional [150,000 jobs in the LGA by 2050](#).

Figure 6: Visitor economy employment in 2018/19 vs. 2023/24 in selected benchmark LGAs and Greater Sydney

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy.id



Key findings for Parramatta

- Over 20,300 people were employed in businesses that service Parramatta's visitor economy in 2023/24.
- Visitor economy workers are more likely to be in management (22%) or sales positions (21%) compared to the broader workforce (15% and 5% respectively).
- The visitor economy workforce is younger (29% vs 10%) and more part-time (64% vs 39%) than the wider workforce.

Trend direction:

- Visitor economy employment has grown at a faster rate (4.5% CAGR) than the wider economy (1.1% CAGR), driven by strong post-pandemic growth in the food and beverage sector (5.2% CAGR).
- Industries with strong visitor-specific demand – such as accommodation (+41%) and sport & recreation (+62%) – have also seen higher employment growth since 2018/19, mirroring business trends.
- Parramatta's visitor economy employment has grown more strongly than in benchmark LGAs between 2018/19 and 2023/24, with higher growth than Blacktown (2.3%), Liverpool (1.4%), and Inner West (0.3%), and well above the Greater Sydney average of -0.2%.

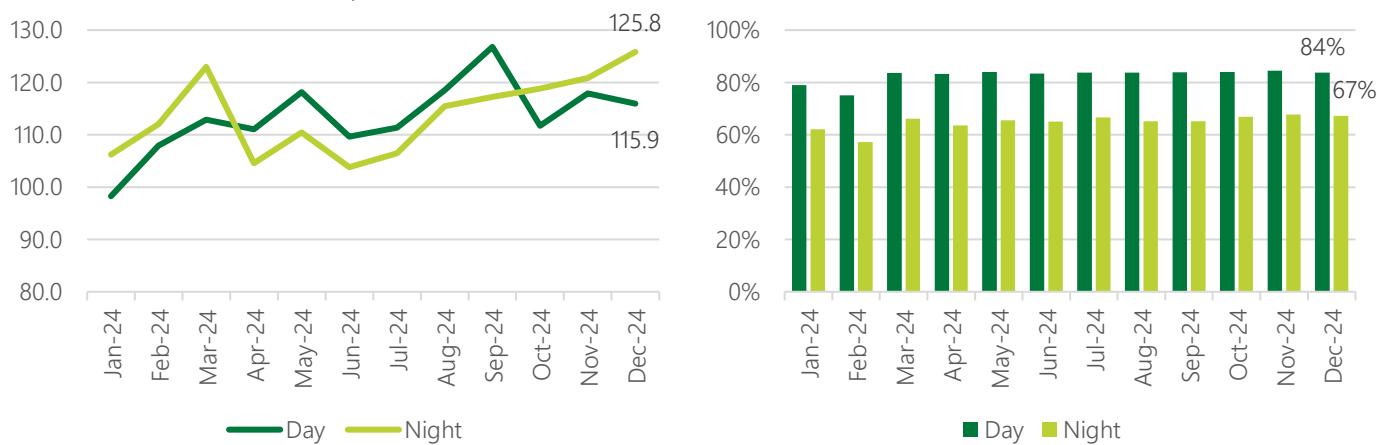
Visitation and spend

Tracking who visits Parramatta, and where and how they spend is central to understanding and supporting the visitor economy. These insights can guide targeted investment, inform events and marketing, and help ensure the city continues to meet the needs of both day visitors and overnight guests.

Key metrics: Mobility trends, number of domestic and international visitors, total and visitor consumer spend (\$)

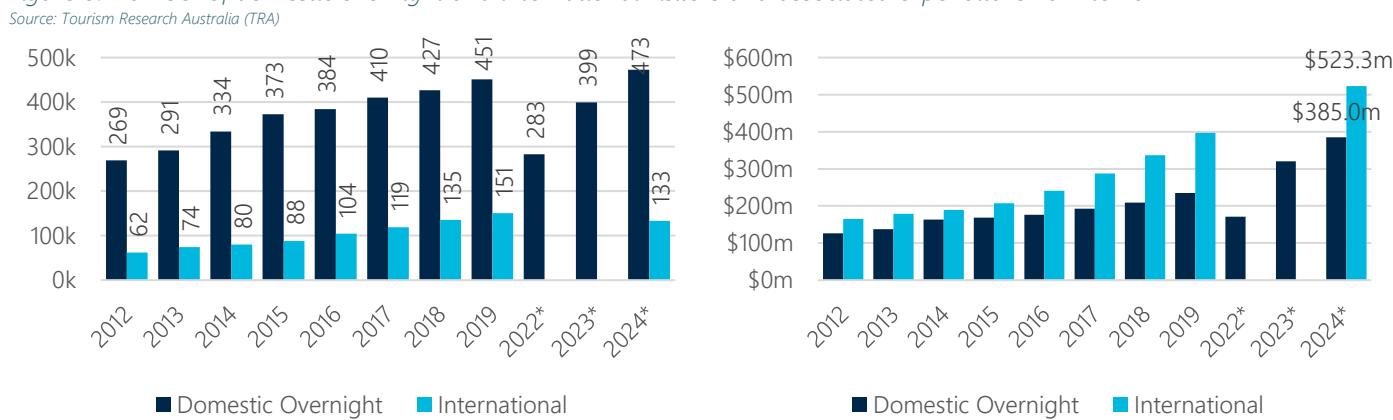
Aggregated mobile device location signals can reveal patterns of people movement within a given geographic area. Over the course of 2024, people movement in Parramatta & Rosehill SA2 (the geographic area covering the CBD and its surrounds) increased during both the day and night. Seasonal differences and events such as Parramatta Lanes in October or the Taylor Swift concert in March may have contributed to this rise. By December 2024, night-time movements were 26% higher than in April 2023, while daytime movements were 16% higher. Over 80% of daytime movements and 67% of night-time movements were made by visitors.

Figure 7: People movement trends (April 2023 = 100) in Parramatta & Rosehill (SA2) with proportion of visitors by day/night
Source: Data After Dark, the Office of 24-Hour Economy Commissioner



Increasing levels of visitation are reflected in data showing the number of international and domestic overnight trips. Prior to the pandemic, both trip types were growing. Following a fall during the pandemic, visitor numbers have returned to these levels while expenditure has surpassed them (\$523m international and \$385m domestic in 2024).

Figure 8: Number of domestic overnight and international visitors and associated expenditure 2012 to 2024†*

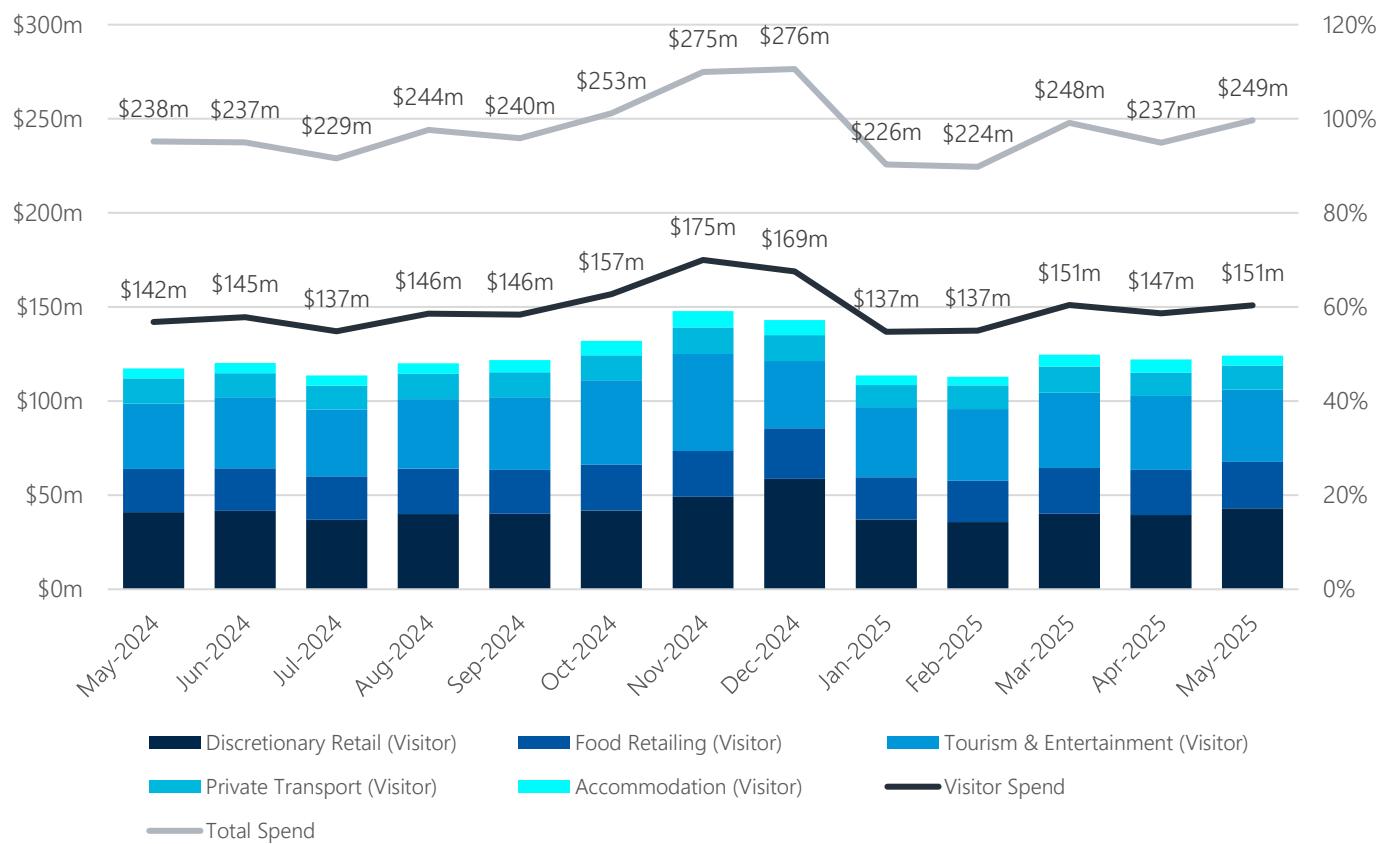


Consumer spend within the Parramatta LGA was consistent between May 2024 and May 2025 period – averaging \$244m per month and totalling nearly \$3.2bn across the 13-month period. Across the period \$733m (23%) occurred at night between 6pm and 6am, with the remaining \$2.4bn occurring during day time hours.

Approximately 61% of Parramatta's \$3.2bn spend was by visitors to the Parramatta LGA. Visitor spend was slightly more variable than total spend, peaking in November 2024, and falling in January 2025, but averaged around \$149m per month, and totalled over \$1.9bn over the 13-month period.

Figure 9: Total consumer spending in Parramatta with a breakdown of total visitor spend by spending category

Source: CommBank iQ

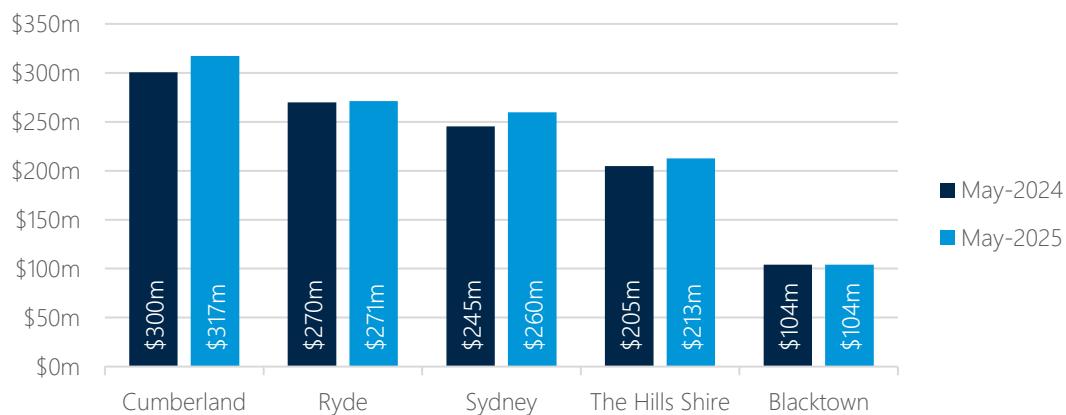


Approximately 28% of visitor spend within the LGA was on discretionary retail (i.e. department stores, clothing and accessories), while 26% was on tourism & entertainment (i.e. restaurants, takeaways, cafes, pubs, attractions, events, etc.), with spending on these categories respectively averaging \$42m and \$39m per month. The largest share of spend in the tourism & entertainment category was on restaurants (10% of all visitor expenditure / averaging \$15m per month) and takeaways (8% / \$12m per month).

While Parramatta experiences strong consumer spend from visitors, it also experiences spend leakage by Parramatta residents to neighbouring LGAs. The largest of these leakages is to Cumberland LGA, where in the year to May 2025 \$317m was spent by Parramatta residents – an increase of \$17m on the prior year. This was followed by Ryde (\$271m), Sydney (\$260m) and The Hills Shire (\$213m).

Figure 10: Consumer spending by Parramatta residents in neighbouring LGAs in May 2024 and May 2025 (annual figures)

Source: CommBank iQ



Further reviewing this data by spend category highlights some of the key reasons Parramatta residents spent in nearby areas. In Cumberland, Ryde and the Hills Shire the main spend leakage was on discretionary retail and food retailing, while in Sydney the main spend leakage was for restaurants followed by discretionary retail. Understanding these reasons provides an opportunity for Parramatta to maintain resident spend within the LGA.

Figure 11: Top three categories for Parramatta spend leakage in each LGA in May 2025

	Cumberland	Ryde	Sydney	The Hills Shire
Annual Leakage (May 2025)	\$317m	\$271m	\$260m	\$213m
1	\$61m (19%) Discretionary Retail	\$37m (14%) Food Retailing	\$53m (20%) Restaurants	\$44m (21%) Discretionary Retail
2	\$46m (15%) Food Retailing	\$36m (13%) Discretionary Retail	\$31m (12%) Discretionary Retail	\$13m (6%) Food Retailing
3	\$25m (8%) Restaurants	\$29m (11%) Restaurants	\$21m (8%) Takeaways	\$13m (6%) Restaurants

Key findings for Parramatta

- Approximately two thirds of night-time movements in the CBD are from visitors from outside the area, rising to 84% during the day
- Over \$3.2 billion was spent by consumers within the LGA between May 2024 and May 2025 - averaging \$244m per month.
- Over 60% of spending is attributable to visitors to the LGA – totalling \$1.9bn between May 2024 and May 2025 - or \$149m per month on average
- Visitors are primarily spending on discretionary retail and tourism and entertainment – specifically restaurants and cafes – indicating that these activities are strengths for the City
- A large amount of resident spend is lost to Cumberland (\$317m), Ryde (\$271m) and Sydney (\$260m)

Trend direction:

- People movement in the CBD increased during 2024 and is 26% higher than April 2023 for night-time visits.
- Domestic overnight visitors and international visitors were rising pre-pandemic and, following a fall, are back to pre-pandemic levels. Expenditure by overnight visitors was +18% higher in 2021-2024 than in 2016-2019



Economic contribution

The visitor economy makes a substantial contribution to Parramatta's broader economy through both economic output and value added (its share of Parramatta's Gross Regional Product). Tracking this contribution over time provides a clear view of the sector's growth, resilience, and return on investment.

Key metrics: Economic Output (\$m), Value Added (\$m)

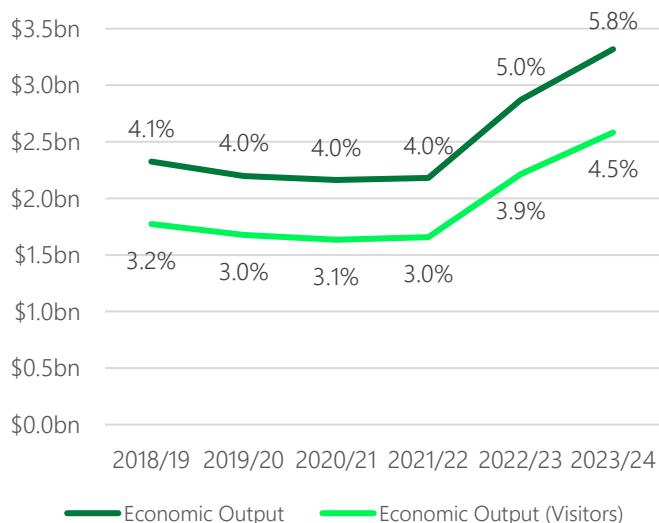
Economic Output

Economic output measures the value of goods and services produced by visitor economy businesses.

Economic output by businesses in the visitor economy in 2023/24 was \$3.3bn or 5.8% of Parramatta's total economic output. This grew sharply in the last two years due to strong growth in the food and beverage sector (+\$200m since 2018/19) and sports and recreation (+\$130m). This growth means the sector has outpaced the wider economy over the last six years averaging 7.4% per annum (vs 0.4% p.a. in Parramatta).

Figure 12: Economic Output and Value Added of the visitor economy – Total contribution and visitor contribution

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy.id

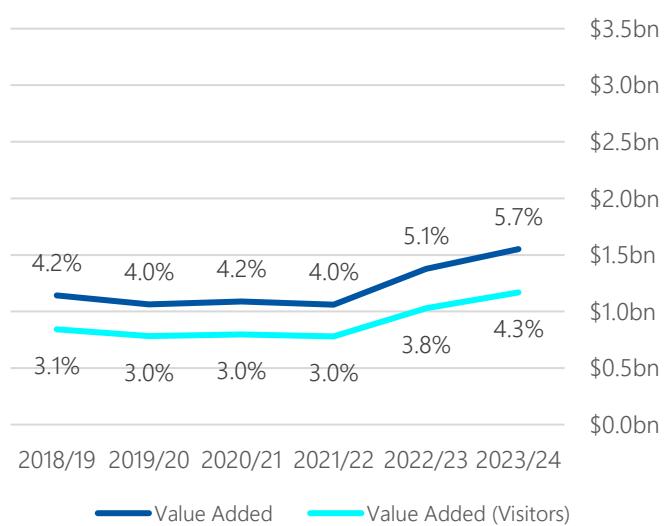


Value Added

Value added represents the direct contribution of these businesses to Parramatta's Gross Regional Product.

Value added by visitor economy businesses in 2023/24 was just over \$1.6bn or 5.7% of Parramatta's economy. Approximately \$1.2bn (75%) of this can be directly attributed visitors to the LGA – the equivalent of 4.3% of the Parramatta economy.

Similar to economic output, value added has also grown strongly over the past two years driven by the food and beverage sector.



Implications for Strategy

Strong growth and high visitor share show the value of prioritising investment in high-performing sectors like hospitality, events, and recreation, while strengthening links between these industries and local suppliers to maximise benefits for the wider economy.

Benchmarking visitor economy economic contribution

Economic output

Parramatta's visitor economy economic output accounted for 6.1% of Greater Sydney's visitor economy in 2023/24 (up from 4.6% in 2018/19).

Parramatta recorded the strongest growth in visitor economy economic output between 2018/19 and 2023/24, increasing by 43% to reach \$3.3 billion - a compound annual growth rate (CAGR) of 7.4%. This outpaced Blacktown (4.2% CAGR), Liverpool (4.9%), Inner West (1.4%) and Greater Sydney (1.3%).

Parramatta's visitor economy also grew as a share of its total economy, rising from 4.1% to 5.8% - similar to Blacktown, Liverpool, and Greater Sydney in 2023/24 but lower than the Inner West (21.2%) meaning there is potential for further growth.

Value added

Parramatta also achieved the highest growth in visitor economy value added (GRP contribution) among the benchmark LGAs between 2018/19 and 2023/24. Its visitor economy grew from \$1.1 billion to \$1.6 billion - a 36% increase and CAGR of 6.3%. This exceeded growth in Blacktown (4.1%), Liverpool (3.9%), Inner West (1.4%), and Greater Sydney overall (1.2%).

This performance meant that Parramatta's visitor economy value added represented 5.7% of Greater Sydney's value added in 2023/24 (4.4% in 2018/19).

Parramatta recorded the largest increase in the visitor economy's share of wider economy value added, rising from 4.2% to 5.7% in 2023/24. While strong, the visitor economy represented a higher share of wider economy value added in Inner West (11.1%), Blacktown (5.9%), and Greater Sydney (6.0%) in 2023/24.

Key findings for Parramatta

- Businesses in the visitor economy contributed \$3.3bn (5.8%) in economic output and \$1.6bn (5.7%) in value added to the Parramatta economy – with strong growth across both metrics over the last two years
- Visitors contributed a large share of this performance - \$2.6bn in economic output and \$1.2bn in value added

Trend direction:

- Parramatta recorded the strongest increase in both visitor economy output and value added among the benchmark LGAs, with economic output rising by 43% and value added by 36% between 2018/19 and 2023/24.

Figure 13: Economic output benchmarking | Visitor economy as a proportion of the total economy in each area

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id

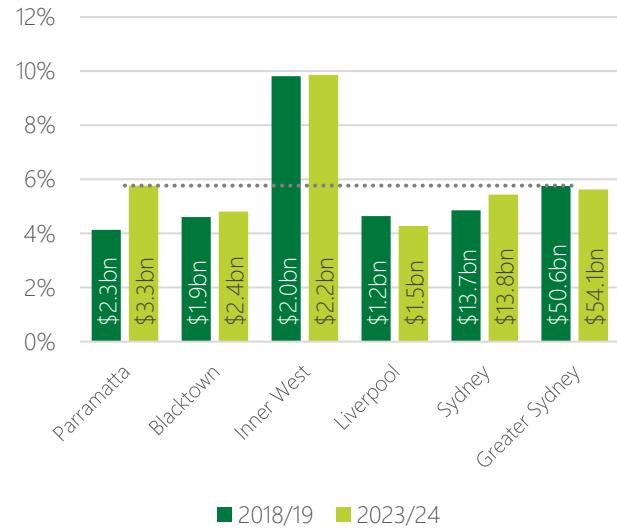
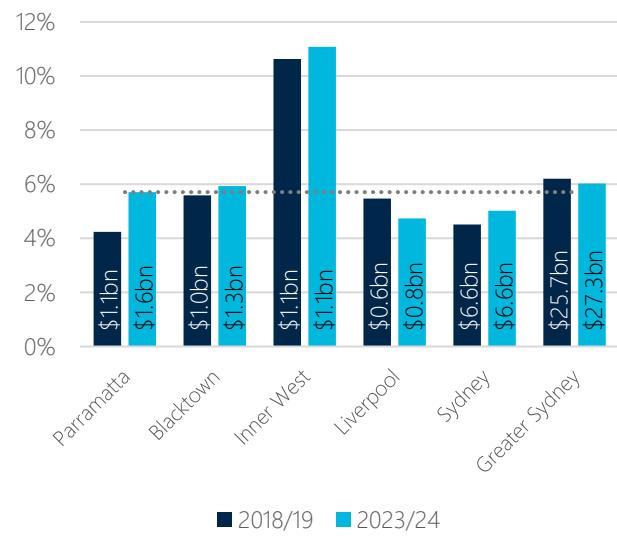


Figure 14: Value added benchmarking | Visitor economy as a proportion of the total economy in each area

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id



State of the visitor economy

Parramatta's visitor economy has been performing strongly, with growth across businesses, jobs, and visitor spending. Major infrastructure projects such as Powerhouse Parramatta, the Riverside Theatres redevelopment, and the Civic Link are reinforcing the city's profile as a cultural and entertainment hub. Combined with its strategic location as the Central River City and improved transport links, Parramatta is increasingly positioned as a destination in its own right.

Performance data shows that Parramatta has not only recovered from the pandemic downturn but, in several areas, exceeded pre-pandemic levels. Night-time and overnight visitation have grown significantly, and visitor spending accounts for more than 60% of total local consumer spend. The strongest gains have been in experience-based sectors such as hospitality, events, and recreation, in line with broader trends in urban visitor economies globally.

Benchmarking confirms Parramatta's position as a leader in growth rates for visitor economy employment and economic output. While the City's total market share is still smaller than that of more established destinations, sustained investment and targeted marketing present opportunities to grow its share of Greater Sydney visitor economy and increase average spend per visitor.

What's working?

Business and job growth

Employment in the visitor economy has grown at 4.5% per annum since 2018/19, with business numbers up 20% since 2019/20.

Sector strengths

Hospitality, accommodation, and sports & recreation are expanding rapidly, supported by new venues, events, and improved infrastructure. This isn't matched with employment just yet, suggesting an influx of small businesses into these industries.

High visitor spend

Visitors account for over 60% of consumer spend, with food, beverage, and entertainment the leading categories.

Benchmark leadership

Growth rates in visitor economy economic output and employment are the highest among Blacktown, Inner West, Liverpool and Sydney.

Where might support be needed?

Retail lag

Store-based retail growth is slower than other visitor sectors, indicating a shift in spending patterns away from goods towards experiences.

Workforce structure

A heavy reliance on part-time employment (64% of the workforce) may affect stability and service delivery.

Seasonal dips

Early-year declines in mobility and spending highlight opportunities for targeted off-peak activation.

Market share gap

Total share of Greater Sydney's visitor economy employment remains smaller than the City of Sydney, indicating opportunity to capture a larger audience.

Appendix

This *Visitor Economy 2025 Report* uses a wide range of data sources to tell the story of Parramatta's visitor economy drawing on the following definition and datasets:

VISITOR ECONOMY DEFINITION

For the purposes of this report, an industry based approach – using Australian and New Zealand Standard Industrial Classification (ANZSIC) codes – is utilised to define the visitor economy. This definition is provided below but it should be borne in mind that while these industries serve visitors they also serve residents. Where possible, the split between resident and visitor is provided for metrics – but for many cases the data covers residents as well as visitors.

ANZSIC	Name	Sector	Description
44	Accommodation	H	Accommodation & Food Services
45	Food & Beverage Activities	H	Accommodation & Food Services
89	Heritage Activities	R	Arts & Recreation Services
90	Creative & Performing Arts Activities	R	Arts & Recreation Services
91	Sports & Physical Recreation Activities	R	Arts & Recreation Services
92	Gambling Activities	R	Arts & Recreation Services
42	Other store-based retailing (i.e. non-grocery)	G	Retail Trade

BUSINESSES

Source: Australian Bureau of Statistics (ABS) Counts of Australian Businesses, including Entries and Exits (CABEE) June 2020 to June 2024, via the Council of Capital City Lord Mayors (CCCLM).

WORKFORCE

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id, Local Employment 2018/19 to 2023/24.

ECONOMIC OUTPUT

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via economy.id, Output 2018/19 to 2023/24.

VALUE ADDED

Source: National Institute of Economic and Industry Research (NIEIR) 2025 via Economy .id, Value Added 2018/19 to 2023/24.

VISITATION AND SPEND

Source: Data After Dark, the Office of 24-Hour Economy Commissioner, December 2024, people movement by month, time of day and SA2.

Source: Smith Travel Research (STR) December 2024, Domestic Overnight and International Trips and Expenditure via Tourism Research Australia (TRA). TRA does not publish LGA-level data for areas near to capital cities due to survey methodology limitations but provided this data on request. When asked where they stayed overnight, many visitors do not identify a specific suburb. As a result, overnight stays are often recorded against central city LGAs rather than surrounding LGAs. This leads to a slight underreporting of visitors and expenditure in surrounding metropolitan areas, and a corresponding overrepresentation in central city figures.

Source: CommBank IQ May 2025, Consumer Spend by month, visitor status and spend category.