



# Blue Mountains Health and Wellbeing Industry Profile

Issue 1: 2014/15



## 1.0 Introduction

Over the past decade, Australia's health and medical industry has grown dramatically in size and reputation for its world-leading technology, innovation, high professional skills, advanced research, development and robust health systems.

The medical technology industry in Australia has an annual turnover of \$4.75 billion and earns an export income of \$1.75 billion (2006-07). It is characterised by a small number of global multinational companies (approximately 20% of the industry) and a large number of small and medium-sized enterprises (80% of the industry). (Source: AusIndustry).

IBIS World estimates that the Australian Medical and Surgical Equipment Manufacturing industry comprises of approximately 2,900 establishments, employing 10,320 people in 2007-08.

The Australian natural (complementary) healthcare industry has domestic sales of over \$1 billion per year. Market research shows that the popularity of natural healthcare products is increasing with a growth rate of 7% year on year. Three-quarters of Australians, including 92% of women aged 20-24, take at least one dietary supplement and a quarter of the population visit complementary healthcare practitioners each year.

## Background Health and Wellbeing industries

The Health and Wellbeing sector has experienced unprecedented growth in recent years. This growth has been driven by factors such as an ageing population, increases in lifestyle-related diseases and changing attitudes to personal health and wellness.

The Blue Mountains is home to a number of businesses identified as being part of the Health and Wellbeing sector. The region has experienced significant growth in this sector in recent years and continues to provide both residents and businesses with opportunities for growth and diversification.

### Health and Wellbeing Industry Sectors

The Health and Wellbeing sector comprises health and medical services, community services, biotechnology and companies promoting improved health and wellbeing.

In the Blue Mountains LGA, the industries listed in Table 1.0 have been identified as contributing to the local Health and Wellbeing sector using Australian Bureau of Statistics (ABS) Industry Codes – ANZSIC 2006.

The industries identified have been categorised as either being part of the 'Health' or 'Wellbeing' sectors.

TABLE 1.0 SECTORS CLASSIFIED AS HEALTH AND WELLBEING INDUSTRIES IN THE BLUE MOUNTAINS

HEALTH SERVICES SECTOR	WELLBEING SECTOR
Health Care and Social Assistance:	Arts and Recreation Activities:
Hospitals (Except Psychiatric Hospitals)	Health and Fitness Centres and Gymnasia Operation
Psychiatric Hospitals	Sports and Physical Recreation Clubs and Sports Professionals
General Practice Medical Services	Sports/Physical Recreation Venues, Grounds/Facilities Operation
Specialist Medical Services	Sports and Physical Recreation Administrative Service
Pathology and Diagnostic Imaging Services	Personal and Other Services, not further defined:
Dental Services	Diet and Weight Reduction Centre Operation
Optometry and Optical Dispensing	Retail:
Physiotherapy Services	Pharmaceutical, Cosmetic and Toiletry Goods Retailing
Chiropractic and Osteopathic Services	Education:
Other Allied Health Services	Sports and Physical Recreation Instruction
Ambulance Services	
Other Health Care Services not elsewhere classified	
Aged Care Residential Services	
Other Residential Care Services	
Child Care Services	
Other Social Assistance Services	
Manufacturing:	
Medical and Surgical Equipment Manufacturing	
Other Professional and Scientific Equipment Manufacturing	
Human Pharmaceutical and Medicinal Product Manufacturing	

## 2.0 Employment within the Health and Wellbeing sector

According to the ABS, of the 3.5 million people employed in NSW in December 2010, the Health Care and Social Assistance industry continues to employ the most people with 385,000 (or 11%) of persons employed. This was followed by the Retail Trade industry (365,000 persons, or 10.5%) and Manufacturing industry (306,000 persons, or 8.8%). Together, these industries employ almost one-third of all employed persons in NSW.

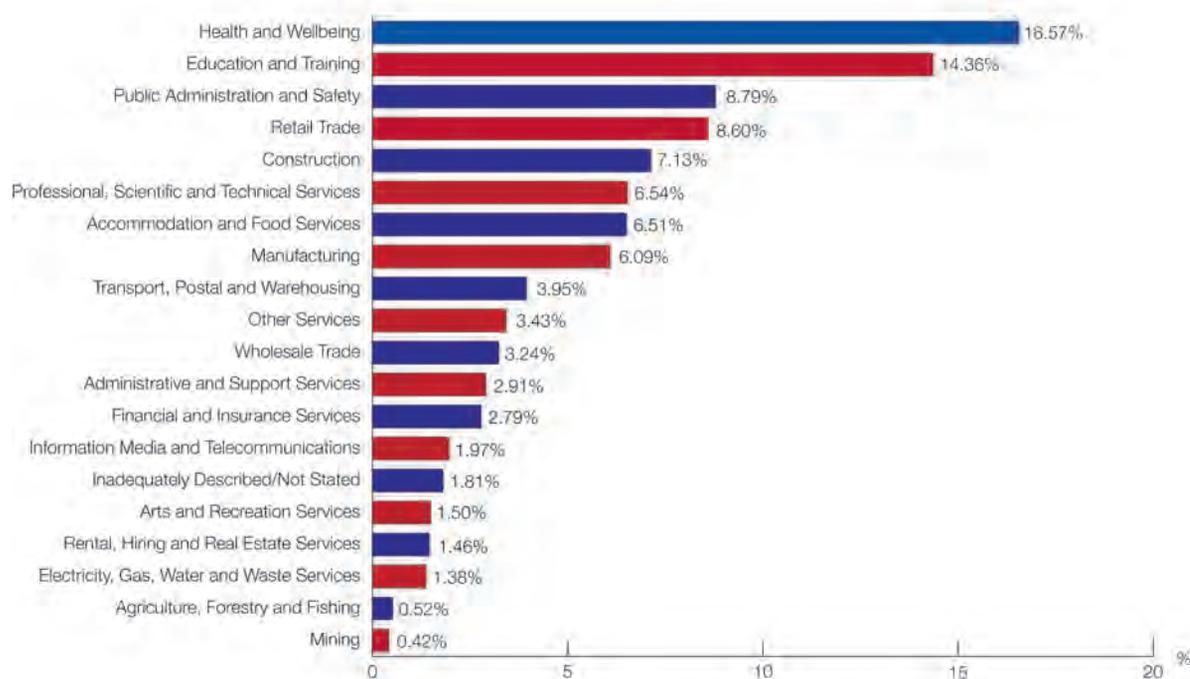
The industries that contributed the most to the increase in employed persons in NSW over the period 2006 to 2010 were Health Care and Social Assistance (29% contribution), Professional, Scientific and Technical Services (14%) and Construction (11%).

Within the Blue Mountains LGA itself there were 35,609 working residents in total (i.e. people who live in the Blue Mountains and are employed either within the LGA itself or elsewhere). The three industry sectors which employed the majority of Blue Mountains residents were:

1. Health Care and Social Assistance (5,254 people or 14.75%)
2. Education and Training (5,217 people or 14.65%)
3. Retail Trade (3,265 people or 9.17%)

These figures have been adjusted to take into consideration the additional sectors which make up the Health and Wellbeing sector (as defined in Table 1.0 within the Blue Mountains LGA). When this adjustment is made the Health and Wellbeing sector is ranked first, employing an estimated 5,902 working residents. This equates to approximately 16.57% of the total working residential population as illustrated in Figure 1.0 below:

FIGURE 1.0 BLUE MOUNTAINS RESIDENT WORKFORCE BY INDUSTRY SECTOR OF EMPLOYMENT INCORPORATING THE HEALTH AND WELLBEING SECTOR, 2011



Source: ABS Census, A.P. SHEERE CONSULTING, 2013

Note: industry employment figures have been adjusted to take account of the sub-industry sectors identified as making up the Health and Wellbeing Sector in the Blue Mountains. The Health and Social Assistance sector is fully incorporated into the Health and Wellbeing sector and is subsequently not a separate entry.

### Where are Blue Mountains resident Health and Wellbeing workers employed?

Based on ABS Census data, 20,531 or 59% of Blue Mountains LGA resident workers travel outside of the area to work. 41% (14,142 persons) of working residents worked within the Blue Mountains LGA itself followed by Penrith - 18% (6,199 persons) and Sydney - 7% (2,417 persons).

The number of Blue Mountains residents working within the Health and Wellbeing sector in the Blue Mountains LGA itself is estimated to be 2,679 persons in 2011. Of these, approximately 196 residents cited 'working from home' during the 2011 Census. 54% of Blue Mountains resident Health and Wellbeing workers travel outside the Blue Mountains LGA for work.

TABLE 1.1 TOP 5 LGAs EMPLOYING MOST BLUE MOUNTAINS' RESIDENTS IN THE HEALTH AND WELLBEING SECTOR, 2011

RANK	PLACE OF WORK	WORKERS
1	Blue Mountains	2,679
2	Penrith	1,378
3	Parramatta	348
4	Blacktown	211
5	Hawkesbury	156

Source: ABS 2011 Census of Population and Housing, A.P. SHEERE CONSULTING

## Health and Wellbeing industry jobs available locally

The employment data in Figure 1.1 represents the number of people employed by businesses/organisations in each of the industry sectors within the Blue Mountains LGA itself. This 'place of work' data represents the total number of jobs without conversion to full-time equivalent employment.

In total there were 16,517 jobs identified in the Blue Mountains LGA itself (as opposed to outside the LGA) based on Census 2011 data.

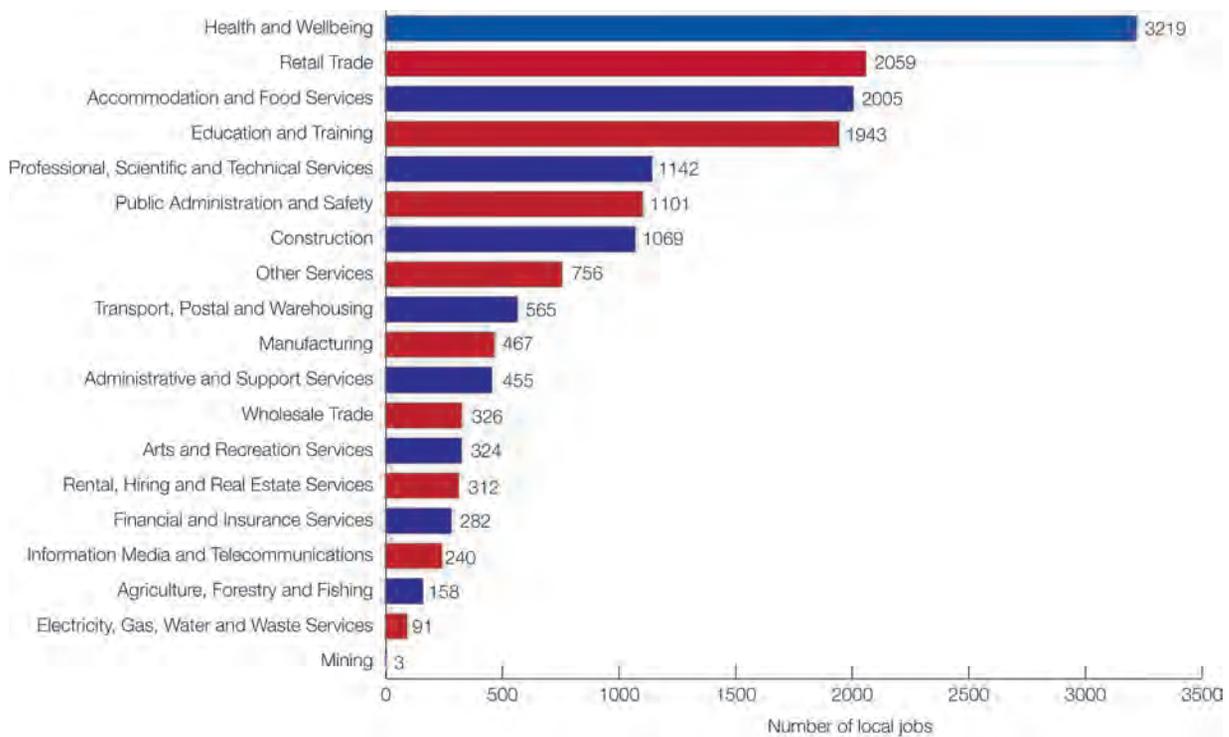
Health and Wellbeing provided the most employment locally with 3,219 jobs or 19.49% of the total number of jobs. This is followed by the Retail Trade sector (2,059 jobs) at 12.47% with Accommodation and Food Services (2,005 jobs) accounting for 12.14% of the total number of jobs available locally.

TABLE 1.2 TOP 5 LOCAL EMPLOYING SECTORS

INDUSTRY SECTOR	NUMBER OF LOCAL JOBS	% OF TOTAL NUMBER OF LOCAL JOBS
Health and Wellbeing	3,219	19.49
Retail Trade	2,059	12.47
Accommodation and Food Services	2,005	12.14
Education and Training	1,943	11.76
Professional, Scientific and Technical Services	1,142	6.91

Source: ABS 2011 Census of Population and Housing, A.P. SHEERE CONSULTING

FIGURE 1.1 EMPLOYMENT WITHIN THE BLUE MOUNTAINS LGA INCORPORATING THE HEALTH AND WELLBEING SECTOR, 2011



Source: ABS 2011 Census of Population and Housing, A.P. SHEERE CONSULTING

Note: industry employment figures have been adjusted to take into account the sub-industry sectors identified as making up the Health and Wellbeing sector in the Blue Mountains thus avoiding any double counting of figures.



The Health and Wellbeing sector provides the most local jobs

46% of Blue Mountains resident Health and Wellbeing employees work in the Blue Mountains

5,902 Blue Mountains residents work in the Health and Wellbeing sector

### 3.0 Economic impact of the Health and Wellbeing sector

#### Industry Value Added - NSW

Industry value added (IVA) is a measure of an industry's economic size in terms of its contribution to the value of goods and services produced in a country or region. Estimates for the IVA of NSW's Healthcare and Social Assistance sector indicate that the size of the sector was approximately \$926.7 million during 2011/2012. This ranks the Health Care and Social Assistance sector second out of twenty among Australian industries in terms of value added contributions to the NSW economy.

Source: National Institute of Economic and Industry Research, 2013

#### Industry Value Added – Blue Mountains LGA

To estimate the Industry Value Added for Health and Wellbeing in the Blue Mountains LGA, input/output data was analysed using the REMPLAN tool. Each sector identified as a Health and Wellbeing Industry in the Blue Mountains was reviewed and numbers adjusted where necessary to avoid double counting to create values for the Health and Wellbeing sector itself.

Therefore, from a direct increase in output of \$382.007 million resulting from 3,219 Health and Wellbeing jobs based in the Blue Mountains LGA, the corresponding increase in direct value added is estimated at being \$245.429 million. From this direct expansion in the economy, flow-on industrial effects in terms of local purchases of goods and services are expected to occur. It is estimated that these indirect impacts result in a further increase to value added of \$49.191 million.

The increase in direct and indirect output and the corresponding boost to jobs in the economy are also estimated to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under this scenario further boost value added by \$85.080 million.

Total value added to the local economy by the Health and Wellbeing sector therefore, including all direct, industrial and consumption effects is estimated to equal up to \$379.700 million.

Taking the estimate of direct value added (\$m) to the economy, comparatively speaking the Health and Wellbeing sector was the second greatest contributor at approximately \$245.429 million in 2014 (see Table 1.3 below).

INDUSTRY SECTOR	VALUE ADDED (\$M)	VALUE ADDED (%)	FULL TIME EQUIVALENT LOCAL JOBS	% SHARE OF LOCAL EMPLOYMENT
Rental, Hiring and Real Estate Services	431.98	21.14	312	1.89
<b>Health and Wellbeing</b>	<b>245.43</b>	<b>12.01</b>	<b>3219</b>	<b>19.49</b>
Education and Training	162.91	7.97	1943	11.76
Professional, Scientific and Technical Services	144.30	7.06	1142	6.91
Construction	137.56	6.73	1069	6.47
Public Administration and Safety	135.48	6.63	1101	6.67
Retail Trade	131.52	6.43	2059	12.47
Accommodation and Food Services	123.16	6.03	2005	12.14
Financial and Insurance Services	114.78	5.62	282	1.71
Transport, Postal and Warehousing	77.38	3.79	565	3.42
Wholesale Trade	56.95	2.79	326	1.97
Information Media and Telecommunications	56.38	2.76	240	1.45
Manufacturing	56.05	2.74	467	2.83
Other Services	54.62	2.67	756	4.58
Administrative and Support Services	46.33	2.27	455	2.75
Electricity, Gas, Water and Waste Services	26.34	1.29	91	0.55
Agriculture, Forestry and Fishing	21.25	1.04	158	0.96
Arts and Recreation Services	19.12	0.94	324	1.96
Mining	2.31	0.11	3	0.02
<b>Total</b>	<b>\$2043.86m</b>		<b>16,517</b>	

Source: REMPLAN, incorporating data sourced from the ABS 2011 Census, 2008/2009 ABS National Input /Output Tables and ABS Gross State Product (June 2012) A.P.SHEERE CONSULTING

### Impact on Output

Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

From a direct increase in output of \$382.007 million resulting from the 3,219 local Health and Wellbeing sector jobs, it is estimated that the demand for intermediate goods and services would rise by \$115.315 million. These industrial effects include multiple rounds of flow-on effects, as servicing sectors increase their own output and demand for local goods and services in response to the direct change to the economy.

The increases in direct and indirect output would typically correspond to the creation of jobs in the economy. Corresponding to this change in employment would be an increase in the total of wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under this scenario are estimated at \$145.670 million.

Total output, including all direct, industrial and consumption effects is estimated to be boosted by the Health and Wellbeing sector by up to \$642.992 million.

### Impact on Employment

It is estimated that the flow-on industrial effects of the 3,219 local Health and Wellbeing sector jobs in terms of local purchases of goods and services, result in the gain of a further 437 jobs.

A proportion of the wages and salaries paid to these employees are again typically spent on consumption and some of this expenditure is consequently captured in the local economy. The consumption effects of the local Health and Wellbeing sector under this scenario are estimated to be boosting employment by 616 jobs. Total employment including all direct (3,219 jobs), industrial and consumption effects is estimated to total up to 4, 272 jobs.

### Impact on Wages and Salaries

Wages and salaries in this report refers to the value of entitlements earned by employees from their employers for services rendered and includes wages and salaries received by employees in cash and in kind (e.g. provision of food, accommodation or motor vehicles), and employers' social contributions such as superannuation contributions and workers' compensation premiums.

The flow-on industrial effects of 3,219 jobs in terms of local purchases of goods and services, is estimated to result in the gain of an additional 437 jobs and a further increase in wages and salaries of \$29.689 million.

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under this scenario are expected to further boost employment in sectors such as retail therefore further increasing wages and salaries by \$35.181million.

Total wages and salaries, including all direct, industrial and consumption effects is estimated to total up to \$268.463 million.

### Health and Wellbeing Economic Impact Summary

Table 1.4 below provides a summary of the estimated economic impact of the Health and Wellbeing sector in the Blue Mountains in January 2014.

The Health and Wellbeing sector is estimated to make a direct contribution of \$245.429 million to the Blue Mountains' Gross Regional Product (GRP). Once flow-on industrial and consumption effects are also taken into consideration, the total contribution to GRP is estimated at up to \$379.700 million (includes all direct, plus flow-on industrial and consumption effects.)

TABLE 1.4 BLUE MOUNTAINS HEALTH AND WELLBEING ECONOMIC IMPACT SUMMARY, 2014

IMPACT	DIRECT EFFECT (\$M)	INDUSTRIAL EFFECT (\$M)	CONSUMPTION EFFECT (\$M)	TOTAL EFFECT (\$M)	TYPE 1 MULTIPLIER	TYPE 2 MULTIPLIER
Output (\$M)	\$382.007	\$115.315	\$145.670	\$642.992	1.302	1.683
Employment (Jobs)	3,219	437	616	4,272	1.136	1.327
Wages and Salaries (\$M)	\$203.593	\$29.689	\$35.181	\$268.463	1.146	1.319
Value added (\$M)	\$245.429	\$49.191	\$85.080	\$379.700	1.200	1.547

Source: REMPLAN 2014

## 4.0 Number of Health and Wellbeing businesses

### Business count - NSW

In 2012 there were an estimated 1,191 Health Care and Social Assistance businesses registered in NSW. This represented 5.4% of all registered businesses in NSW.

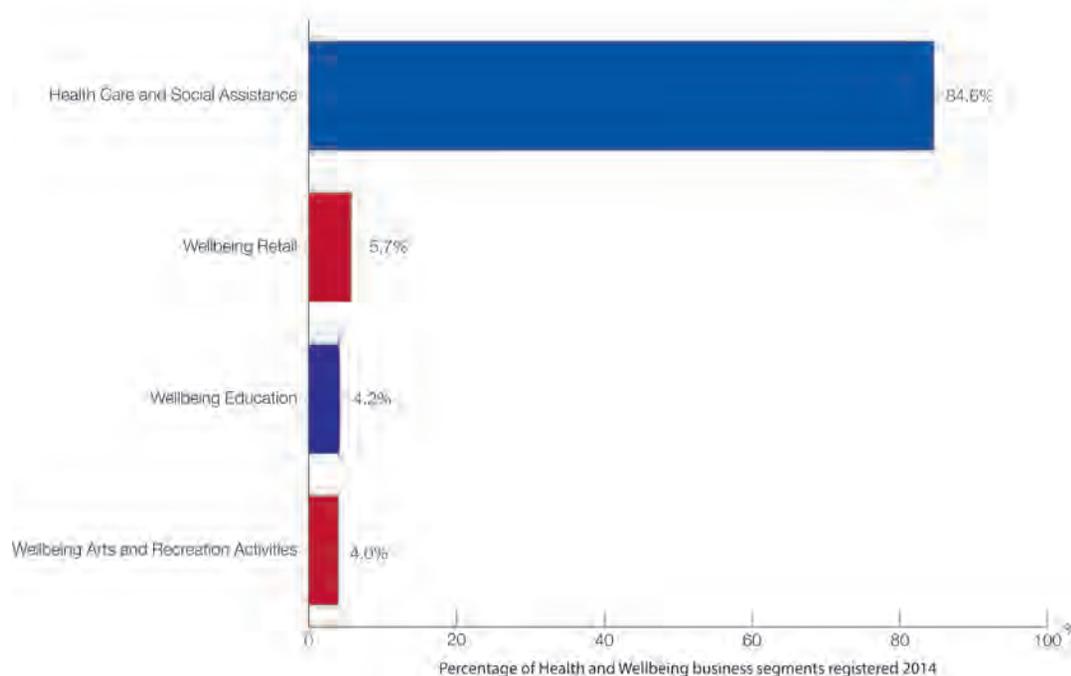
(Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, 2008 to 2012 Cat. No. 8165.0)

## Business Counts – Blue Mountains

In the Blue Mountains there were 454 registered businesses classified as Health and Wellbeing Industries in 2014. Of these, Health Services accounted for 86% of all Health and Wellbeing businesses with Wellbeing organisations making up the remainder.

By sheer number of registered businesses, the largest segment in the Blue Mountains Health and Wellbeing sector was General Practice Medical Services, followed by Other Allied Health Services and Specialist Medical Services. (see Figure 1.4).

FIGURE 1.4 HEALTH AND WELLBEING BUSINESS COUNT BY PERCENTAGE SHARE OF TOTAL SECTOR, 2014



Source: ABR data 2013; REMPLAN 2014; A.P.SHEERE CONSULTING

## 5.0 Sector trends

The four largest employing industries in New South Wales are: Health Care and Social Assistance, Retail Trade, Manufacturing and Professional, Scientific and Technical Services. They each have more than 300,000 workers and collectively account for 39.0% of the state's employment.

Between 2007 and 2012, around 270,500 new jobs were created in the Health Care and Social Assistance sector in Australia. (Source: ABS Labour Force).

DEEWR projections to November 2017, indicate that Health Care and Social Assistance will make the largest contribution to employment growth in Australia (increasing by 177,800),

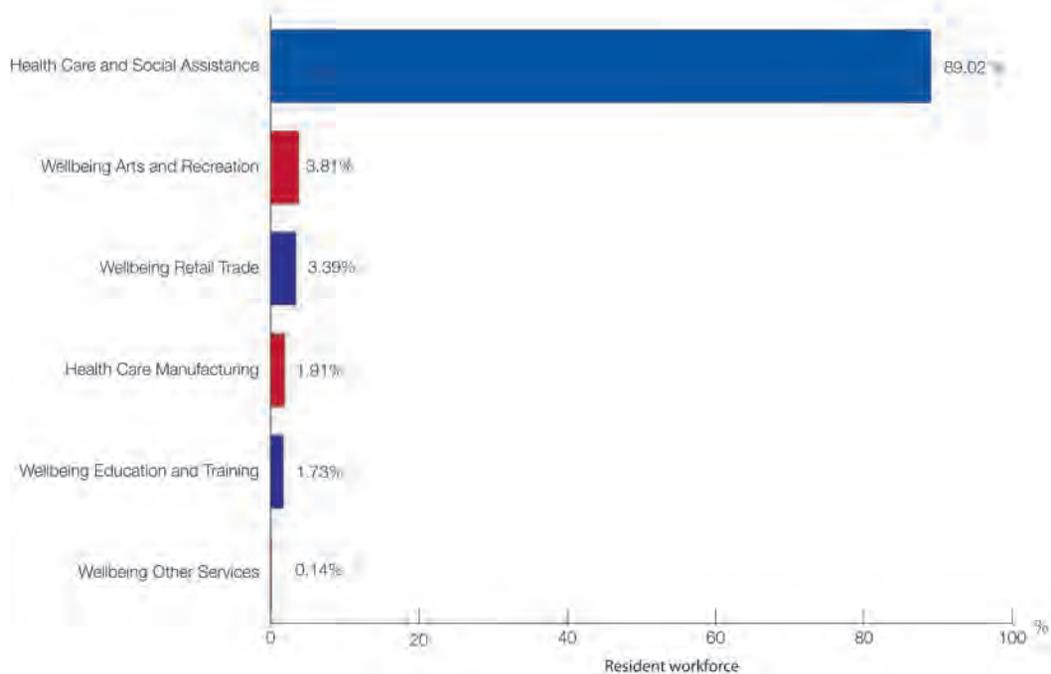
The Health and Wellbeing sector in the Blue Mountains comprises of two sectors: Health Services sector and Wellbeing sector. The Health Services sector employs by far the most resident workers totalling 5,367 persons or 91% of the sector's workforce, with the Wellbeing sector employing 535 working residents.

TABLE 1.5 HEALTH AND WELLBEING SECTOR TRENDS

HEALTH SERVICES SECTOR	NO. RESIDENTS EMPLOYED, 2011	WELLBEING SECTOR	NO. RESIDENTS EMPLOYED, 2011
Health Care and Social Assistance	5,254	Arts and Recreation Activities	225
Manufacturing	113	Personal and Other Services	8
		Retail	200
		Education	102
Sector totals	5,367		535
HEALTH AND WELLBEING SECTOR TOTAL			5,902

Source: Based on ABS Census 2011, A.P. SHEERE CONSULTING

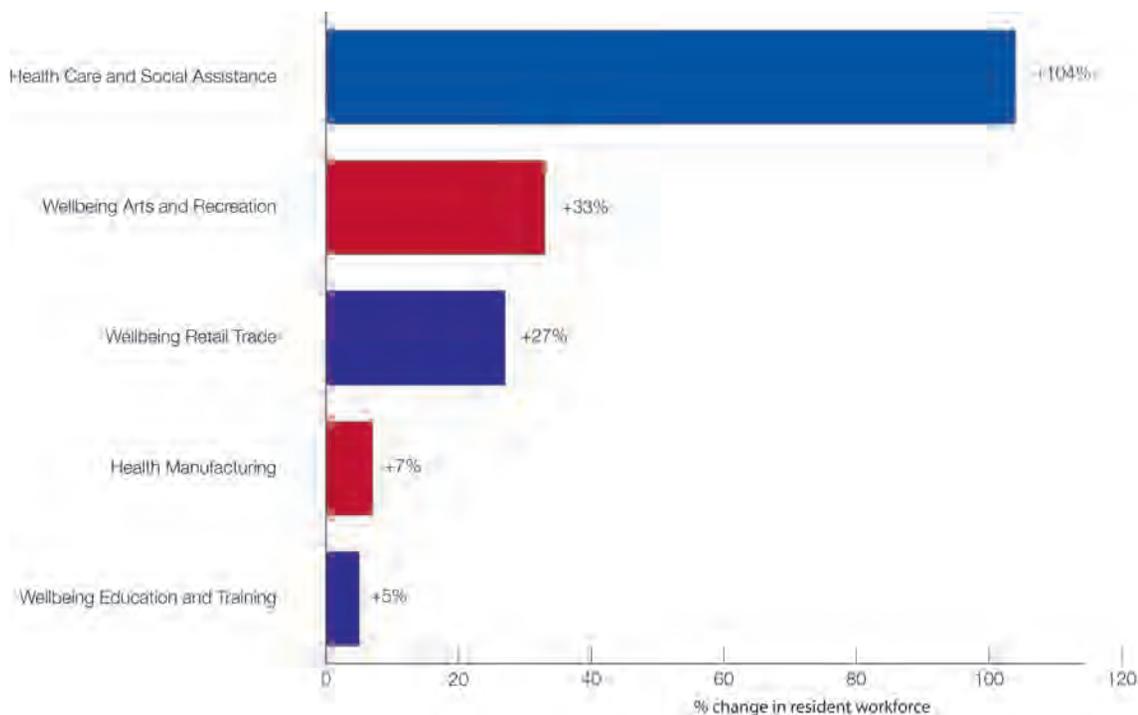
FIGURE 1.5 PERCENTAGE OF BLUE MOUNTAINS RESIDENT WORKFORCE BY HEALTH AND WELLBEING SECTOR, 2011



Source: Based on ABS Census 2011, A.P. SHEERE CONSULTING

Between 2006 and 2011 the Health and Wellbeing sector increased in terms of residents employed by 8%. This represents an average annual increase of 1.6%. The Wellbeing sector experienced the most growth between 2006 and 2011, increasing by 26%. The Sports and Physical Recreation Clubs and Sports Professionals segment (in the Wellbeing sector) experienced the greatest increase in number of residents employed over the same period of 139%, or 27.8% per annum followed by Sports and Physical Recreation Instruction at 104%.

FIGURE 1.6 RESIDENT EMPLOYMENT IN HEALTH AND WELLBEING SECTOR CHANGE OVER TIME, 2006 -2011



Source: Based on ABS Census 2011, A.P. SHEERE CONSULTING



The Health Services sector employs the most Blue Mountains residents

Health and Wellbeing industries contribute up to \$643 million in Total Output to the Blue Mountains

Health and Wellbeing Industries contribute the 2nd greatest amount to Gross Regional Product

## 6.0 Sector Analysis-Health Services

- Health Services employed an estimated 5,367 resident workers, or 91% of total Health and Wellbeing employment in 2011.
- In 2014, there were an estimated 391 Health Services businesses registered in the Blue Mountains which accounts for 86% of all Health and Wellbeing businesses.
- Employment in Health Services increased by 7% between 2006 and 2011.
- Employment growth over the past five years has averaged 1.4% per annum.

## 6.1 Health Care and Social Assistance

The Health Care and Social Assistance segment employed approximately 5,254 Blue Mountains residents in 2011, representing 89% of workers in the Health and Wellbeing sector. The resident workforce employed within the Health Care and Social Assistance segment increased by 7% between 2006 and 2011. This was largely due to the Health Care and Social Assistance, not further defined segment where the number of workers changed from 149 to 256 persons in 2011.

In 2014, there were 384 registered Health Care and Social Assistance businesses in the Blue Mountains.

TABLE 1.6 HEALTH CARE AND SOCIAL ASSISTANCE

SECTOR	RESIDENT WORKFORCE 2011	% OF TOTAL HEALTH & WELLBEING RESIDENT WORKERS 2011	RESIDENT WORKFORCE 2006	NUMBER OF REGISTERED BUSINESSES, 2014
Health Care and Social Assistance, nfd	256	4.34	149	0
Hospitals, nfd	3	0.05	6	0
Hospitals (except Psychiatric Hospitals)	1372	23.25	1574	5
Psychiatric Hospitals	5	0.08	11	0
Medical and Other Health Care Services, nfd	81	1.37	178	0
Medical Services, nfd	0	0.00	3	0
General Practice Medical Services	277	4.69	251	109
Specialist Medical Services	102	1.73	88	35
Pathology and Diagnostic Imaging Services	117	1.98	108	5
Allied Health Services, nfd	0	0.00	3	0
Dental Services	130	2.20	130	33
Optometry and Optical Dispensing	42	0.71	46	6
Physiotherapy Services	59	1.00	61	17
Chiropractic and Osteopathic Services	35	0.59	24	18
Other Allied Health Services	335	5.68	245	89
Other Health Care Services, nfd	0	0.00	0	0
Ambulance Services	115	1.95	99	0
Other Health Care Services nec	34	0.58	28	0
Residential Care Services, nfd	0	0.00	3	0
Aged Care Residential Services	723	12.25	674	2
Other Residential Care Services	179	3.03	131	3
Social Assistance Services, nfd	162	2.74	175	0
Child Care Services	392	6.64	311	32
Other Social Assistance Services	835	14.15	605	30
Total	5,254		4,903	384

Note: nfd means not further defined

Source: Based on ABS Census 2011, REMPLAN 2014, A.P. SHEERE CONSULTING

## 6.2 Health Care Manufacturing

The Health Care Manufacturing segment employed 113 Blue Mountains residents in 2011, representing 0.59% of workers in the Health and Wellbeing sector. The resident workforce employed within the Health Care Manufacturing segment decreased by approximately 7% between

2006 and 2011. This was largely due to the Human Pharmaceutical and Medicinal Product Manufacturing segment where the number of workers changed from 44 to 35 persons in 2011. In 2014, there were an estimated 7 registered Health Care Manufacturing businesses in the Blue Mountains.

TABLE 1.7 HEALTH CARE MANUFACTURING SUMMARY				
SECTOR	RESIDENT WORKFORCE 2011	% OF TOTAL HEALTH & WELLBEING RESIDENT WORKERS 2011	RESIDENT WORKFORCE 2006	NUMBER OF REGISTERED BUSINESSES, 2014
Machinery and Equipment Manufacturing, nfd	31	0.53	38	0
Professional and Scientific Equipment Manufacturing, nfd	0	0.00	3	0
Medical and Surgical Equipment Manufacturing	29	0.49	22	5
Other Professional and Scientific Equipment Manufacturing	18	0.30	15	2
Pharmaceutical and Medicinal Product Manufacturing, nfd	0	0.00	0	0
Human Pharmaceutical and Medicinal Product Manufacturing	35	0.59	44	0
Total	113		122	7

Note: nfd means not further defined

Source: ABS Census 2011, REMPLAN 2014, A.P. SHEERE CONSULTING

## 7.0 Sector analysis-Wellbeing

- The Wellbeing sector employed an estimated 535 resident workers, or 9% of total Health and Wellbeing employment in 2011.
- There were an estimated 63 Wellbeing businesses registered in the Blue Mountains in 2014 which accounts for 14% of all Health and Wellbeing businesses.
- Employment in the Wellbeing sector increased by 26% between 2006 and 2011.
- Employment growth over the past five years has averaged 5.2% per annum.

## 7.1 Wellbeing Arts and Recreation

The Wellbeing Arts and Recreation segment employed approximately 225 Blue Mountains residents in 2011, representing 4% of workers in the Health and Wellbeing sector.

The resident workforce employed within the Wellbeing Arts and Recreation segment increased by 27% between 2006 and 2011. This was largely due to the Sports and Physical Recreation Clubs and Sports Professionals segment, where the number of workers changed from 23 to 55 persons in 2011. In 2014, there were 18 registered Wellbeing Arts and Recreation businesses in the Blue Mountains.

TABLE 1.8 WELLBEING ARTS AND RECREATION SUMMARY				
SECTOR	RESIDENT WORKFORCE 2011	% OF TOTAL HEALTH & WELLBEING RESIDENT WORKERS 2011	RESIDENT WORKFORCE 2006	NUMBER OF REGISTERED BUSINESSES, 2014
Sports and Recreation Activities, nfd	3	0.05	14	0
Sports and Physical Recreation Activities, nfd	0	0.00	5	0
Health and Fitness Centres and Gymnasias Operation	70	1.19	58	8
Sports and Physical Recreation Clubs and Sports Professionals	55	0.93	23	6
Sports and Physical Recreation Venues, Grounds and Facilities Operation	69	1.17	72	1
Sports and Physical Recreation Administrative Service	28	0.47	5	3
Total	225		177	18

Note: nfd means not further defined

Source: ABS Census 2011; REMPLAN 2014, A.P. SHEERE CONSULTING

### 7.2 Wellbeing Retail Trade

The Wellbeing Retail Trade segment employed 200 Blue Mountains residents in 2011, representing 3.39% of workers in the Health and Wellbeing sector.

The resident workforce employed within the Wellbeing Retail Trade segment increased by 5% between 2006 and 2011. In 2014, there were 26 registered Wellbeing Retail Trade businesses in the Blue Mountains.

TABLE 2.4 WELLBEING RETAIL TRADE SUMMARY				
SECTOR	RESIDENT WORKFORCE 2011	% OF TOTAL HEALTH & WELLBEING RESIDENT WORKERS 2011	RESIDENT WORKFORCE 2006	NUMBER OF REGISTERED BUSINESSES, 2014
Pharmaceutical, Cosmetic and Toiletry Goods Retailing	200	3.39%	191	26
Total	200	3.39%	191	26

Source: ABS Census 2011; REMPLAN 2014; A.P. SHEERE CONSULTING

### 7.3 Wellbeing Education and Training

The Wellbeing Education and Training segment employed 102 Blue Mountains residents in 2011, representing 1.73% of workers in the Health and Wellbeing sector.

The resident workforce employed within the Wellbeing Education and Training segment increased by 104% between 2006 and 2011. In 2014, there were 19 registered Wellbeing Education and Training businesses in the Blue Mountains.

TABLE 2.4 WELLBEING EDUCATION AND TRAINING SUMMARY				
SECTOR	RESIDENT WORKFORCE 2011	% OF TOTAL HEALTH & WELLBEING RESIDENT WORKERS 2011	RESIDENT WORKFORCE 2006	NUMBER OF REGISTERED BUSINESSES, 2014
Sports and Physical Recreation Instruction	102	1.73	50	19
Total	102		50	19

Source: ABS Census 2011, REMPLAN 2014, A.P. SHEERE CONSULTING



## 8.0 Summary

A significant number of residents in the Blue Mountains LGA are employed within the Health and Wellbeing sector both locally and in neighbouring regions.

Both Health Services and Wellbeing industries are well established within the region. Health and Wellbeing provided the most employment locally with 3,219 jobs or 19.49% of the total number of jobs.

The three industry sectors which employed the majority of Blue Mountains residents were:

1. Health Care and Social Assistance (5,254 people or 14.75%)
2. Education and Training (5,217 people or 14.65%)
3. Retail Trade (3,265 people or 9.17%)

These figures have been adjusted to take into consideration the additional sectors which make up the Health and Wellbeing sector. When this adjustment is made the Health and Wellbeing sector is ranked first, employing an estimated 5,902 working residents. This equates to approximately 16.57% of the total working residential population.

Total Value Added to the local economy by the Health and Wellbeing sector, including all direct, industrial and consumption effects is estimated to equal up to \$379.700 million according to REMPLAN data (using ABS input/output data).

In addition to this, taking the estimate of Direct Value Added (\$m) to the economy, comparatively speaking the Health and Wellbeing sector was the second greatest contributor to the local economy reaching approximately \$245.43 million in 2014.

There were approximately 454 registered businesses classified as Health and Wellbeing businesses in the Blue Mountains in 2014. Of these, Health Services accounted for 86% of all Health and Wellbeing businesses with Wellbeing organisations making up the remainder. By sheer number of registered businesses, the largest segment in the Blue Mountains Health and Wellbeing sector was General Practice Medical Services, followed by other Allied Health Services and Specialist Medical Services.

Industry trends point to a bright future with continued development and diversification expected within the Health and Wellbeing sector.





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