

Chapter Thirteen

Tourism

Contents	Page
Economic importance	429
International travel	429
International visitor expenditure	436
Domestic travel	436
Tourist accommodation	439
Inbound tourism	439
Overseas tourism marketing expenditure	439
Australian Tourist Commission	439
BIBLIOGRAPHY	440

Tourism encompasses all short-term travel away from the normal place of work and residence, including that undertaken for business and pleasure. It includes both domestic and international travel and involves the consumption of a wide range of goods and services provided by, for example, transport and tour operators, accommodation establishments, theme parks and attractions, entertainment and arts venues, museums and historical sites, restaurants, travel agents and souvenir retailers.

It also draws on services provided by the Commonwealth Government, the State and Territory Governments and local government organisations without direct charge to tourists, such as the construction and maintenance of roads, airports, harbours, railways and national parks, tourism promotion, immigration and customs services, information services and the provision of a large number of recreational facilities.

Economic importance

Just as tourism is a dominant force in the global economy, it is one of Australia's largest and most dynamic sectors of commerce too. In recent years, tourism has experienced unprecedented growth and made a substantial contribution to national economic development. It has matured into a prominent, sophisticated activity with the potential to play a significant role in securing Australia's future prosperity.

It is estimated by the Bureau of Tourism Research that tourism directly and indirectly contributed 5.5 per cent to Gross Domestic Product in 1991-92 and accounted for some 458,000 jobs (6.0% of total employment). During the 1980s and into the 1990s, tourism has created over 100,000 new jobs.

In 1991-92 total expenditure derived from tourism was around \$26.2 billion, of which \$18.4 billion was attributed to domestic tourism. Foreign exchange earnings from international tourism to Australia were estimated to be about \$7.7 billion. This represents an increase of 8.5 per cent over the previous year, and amounted to 11 per cent of Australia's total current account credits. This increase resulted from growth in both the volume of visitors and daily expenditure per head.

While growth in tourism flows to Australia in the mid to late 1980s was almost twice the international rate, Australia's share of world tourism is still small, accounting for only around 0.5 per cent of total international visitor arrivals in all countries. Because Australia is a long haul destination for most international travellers this share is never likely to be large; however, there is still considerable potential for growth in the future.

The domestic travel market was relatively stagnant from 1984-85 to 1988-89, but 1989-90 saw a 4.6 per cent increase to 223.8 million in the number of domestic tourism visitor nights compared with the previous year. Thereafter it experienced an overall downward trend to 210.4 million domestic tourism visitor nights in 1992-93.

The number of international visitors to Australia increased at a rate of 25 per cent per annum from 1984 to 1988. However, 1989 saw a 7.5 per cent decrease in arrivals to 2.1 million partly because of the 'rain shadow' effect of Expo 88 and the Bicentennial and the adverse impact of the disruption to domestic airline services in late 1989. Arrivals recovered by 6.5 per cent to 2.2 million in 1990 and thereafter increased to new record levels of 2.4 million in 1991, 2.6 million in 1992 and 3.0 million in 1993, with annual growth rates of 7.0, 9.8 and 15.1 per cent, respectively (table 13.1). Visitors from Asia have contributed increasingly to this upward trend.

International travel

Statistics about travellers to and from Australia are classified in the first instance by the actual or intended length of stay in Australia or abroad as reported on passenger cards collected from incoming and outgoing passengers under the *Migration Act 1958*; this classification distinguishes between long-term and short-term movement.

Statistics of short-term arrivals and departures are given below. (Statistics of permanent and long-term movement are shown in the chapter, Demography.)

Short-term movement is defined as comprising visitor arrivals and Australian resident departures where the intended stay in Australia or abroad is for a period of less than 12 months, together with departures of visitors and returns of Australian residents who have stayed in Australia or abroad for less than 12 months.

Short-term movement excludes persons who arrive in and depart from Australia on the same ship's voyage or on the same flight (variously called 'direct transit' or 'through' passengers), or who change flights without leaving the airport's transit area; passengers on pleasure cruises commencing and finishing in

Australia; and all crew. However, it includes persons who pass through the customs barrier and declare the purpose of their visit to Australia to be 'in transit'. Short-term visitors are more numerous than long-term visitors and have come to be regarded as 'tourists' by many users of the statistics.

13.1 SUMMARY OF SHORT-TERM TRAVELLERS

	<i>Overseas visitors</i>		<i>Australian residents</i>	
	<i>Arriving in Australia</i>	<i>Departing from Australia</i>	<i>Departing from Australia</i>	<i>Returning to Australia</i>
Census years				
1981	936,700	900,400	1,217,300	1,181,400
1986	1,429,400	1,363,800	1,539,600	1,513,200
1991	2,370,400	2,350,800	2,099,400	2,009,700
Year				
1988	2,249,300	2,174,100	1,697,600	1,637,900
1989	2,080,300	2,020,400	1,989,800	1,912,700
1990	2,214,900	2,162,700	2,169,900	2,109,300
1991	2,370,400	2,350,800	2,099,400	2,009,700
1992	2,603,300	2,533,500	2,276,300	2,166,300
1993 p	2,996,300	2,930,300	2,267,200	2,213,700

Source: *Overseas Arrivals and Departures, Australia (3404.0)*.

In addition to the basic classification of travellers shown above, certain other characteristics are collected. These are: sex, age, marital status, country of citizenship, country of birth, intended or actual length of stay, purpose of journey, mode of transport, country of residence or country where most time was or will be spent, country of embarkation or disembarkation, State of residence or State where most time was or will be spent, and State or country of embarkation or disembarkation.

The categories shown in the previous table are cross-classified by various characteristics listed above and the resulting statistics are shown in considerable detail in ABS monthly, quarterly and annual publications. Certain unpublished information is available on request. Selected traveller statistics are shown in the following tables.

As shown in table 13.2, short-term travel is subject to marked seasonal variation, December being the peak month for the arrival of overseas visitors and the departure of Australian residents.

13.2 SHORT-TERM TRAVELLERS: ARRIVALS AND DEPARTURES OF OVERSEAS VISITORS AND AUSTRALIAN RESIDENTS, BY MONTH OF ARRIVAL OR DEPARTURE, 1993

Month	Overseas visitors		Australian residents	
	Arriving	Departing	Departing	Returning
January	242,800	300,800	147,600	273,800
February	245,500	230,000	140,800	161,800
March	257,900	256,100	171,900	143,100
April	226,300	241,700	189,900	165,800
May	213,400	236,100	185,100	154,100
June	204,600	200,300	218,400	159,900
July	244,600	203,900	207,100	227,800
August	239,900	258,500	178,800	182,500
September	224,000	212,300	228,800	200,500
October	267,200	242,700	176,900	252,400
November p	284,800	279,200	170,500	163,200
December p	345,300	268,700	251,400	128,600
Total p(a)	2,996,300	2,930,300	2,267,200	2,213,700

(a) Differences between the sums of components and totals are due to rounding.

Source: *Overseas Arrivals and Departures, Australia (3401.0)*.

In 1993, the majority of Australian residents departing for short-term visits abroad intended to stay for under one month, with 54 per cent intending to stay for under three weeks (table 13.3). The majority of short-term visitors to Australia intended to stay under three weeks, with 60 per cent intending to stay under two weeks (table 13.4).

Statistics for Australian residents refer to their total time away from Australia; for overseas

visitors they refer only to the Australian portions of their trips.

In the case of both Australian residents departing and overseas visitors arriving, the most common reason for their visit was 'holiday', followed by 'visiting relatives' and 'business' as the second and third most common reasons. Table 13.6 provides statistics on short-term travellers classified by country.

13.3 SHORT-TERM TRAVELLERS: DEPARTURES OF AUSTRALIAN RESIDENTS, BY STATED PURPOSE OF JOURNEY AND INTENDED LENGTH OF STAY, 1993p

Intended length of stay	Main purpose of journey						Total(b)
	Visiting relatives	Holiday, accompanying business traveller(a)	Con-vention	Business	Employ-ment	Other and not stated	
Under 1 week	27,700	94,500	10,000	102,100	3,200	16,000	253,600
1 week & under 2 weeks	54,400	354,200	22,000	105,600	2,800	21,100	560,100
2 weeks & under 3 weeks	70,800	240,100	11,900	59,600	3,700	15,000	401,000
3 weeks & under 1 month	60,800	112,300	5,500	25,400	4,200	8,500	216,700
1 month & under 2 months	149,400	193,100	5,200	38,300	5,200	18,200	409,400
2 months & under 3 months	65,800	70,200	1,400	14,800	4,200	6,900	163,400
3 months & under 6 months	55,300	53,800	300	14,100	6,800	11,000	141,200
6 months & under 12 months	29,700	43,000	100	11,500	19,600	18,000	121,800
Total(b)	513,800	1,161,200	56,300	371,500	49,800	114,600	2,267,200

(a) Includes student vacation. (b) Differences between the sums of components and totals are due to rounding.

Source: *Overseas Arrivals and Departures, Australia (3404.0)*.

13.4 SHORT-TERM TRAVELLERS: ARRIVALS OF OVERSEAS VISITORS, BY STATED PURPOSE OF JOURNEY AND INTENDED LENGTH OF STAY, 1993p

Intended length of stay	Main purpose of journey							Total(a)
	In transit	Visiting relatives	Holiday, accompanying business traveller	Convention	Business	Employment	Other & not stated	
Under 1 week	94,400	48,700	602,300	12,300	117,100	3,600	23,900	902,400
1 week & under 2 weeks	—	84,500	687,000	23,500	81,100	4,300	24,100	904,500
2 weeks & under 3 weeks	—	93,800	228,700	9,700	31,800	1,000	11,500	376,500
3 weeks & under 1 month	—	70,900	112,300	2,000	8,200	600	6,100	200,100
1 month & under 2 months	—	130,100	150,500	1,800	14,400	1,500	10,500	308,800
2 months & under 3 months	—	41,700	38,300	400	5,200	1,000	7,100	93,700
3 months & under 6 months	—	39,700	40,000	200	4,100	2,400	13,500	100,000
6 months & under 12 months	—	21,700	34,200	100	4,300	9,700	40,500	110,500
Total(a)	94,400	531,200	1,893,100	50,100	266,100	24,100	137,400	2,996,300

(a) Differences between the sums of components and totals are due to rounding.

Source: Overseas Arrivals and Departures, Australia (3404.0).

International visitors generally spend most time in New South Wales, with Queensland and Victoria being the next most visited States,

although there is some variation in this overall pattern according to their country of residence.

13.5 INTERNATIONAL VISITORS: NIGHTS SPENT IN EACH STATE, 1992 (per cent)

State/Territory	Country of residence								Total
	USA	Japan	Other Asia	Canada	New Zealand	UK and Ireland	Other Europe	Other countries	
New South Wales	35	33	35	30	35	31	27	42	33
Victoria	21	6	28	17	12	17	17	23	19
Queensland	25	50	11	32	30	24	27	21	25
South Australia	5	2	3	6	4	7	7	2	5
Western Australia	6	6	17	9	10	15	10	5	12
Tasmania	1	—	1	1	1	2	2	1	1
Northern Territory	4	2	1	3	6	3	7	1	3
Australian Capital Territory	4	1	4	2	2	2	3	5	3
Australia	100	100	100	100	100	100	100	100	100

Source: Bureau of Tourism Research, International Visitor Survey, 1992.

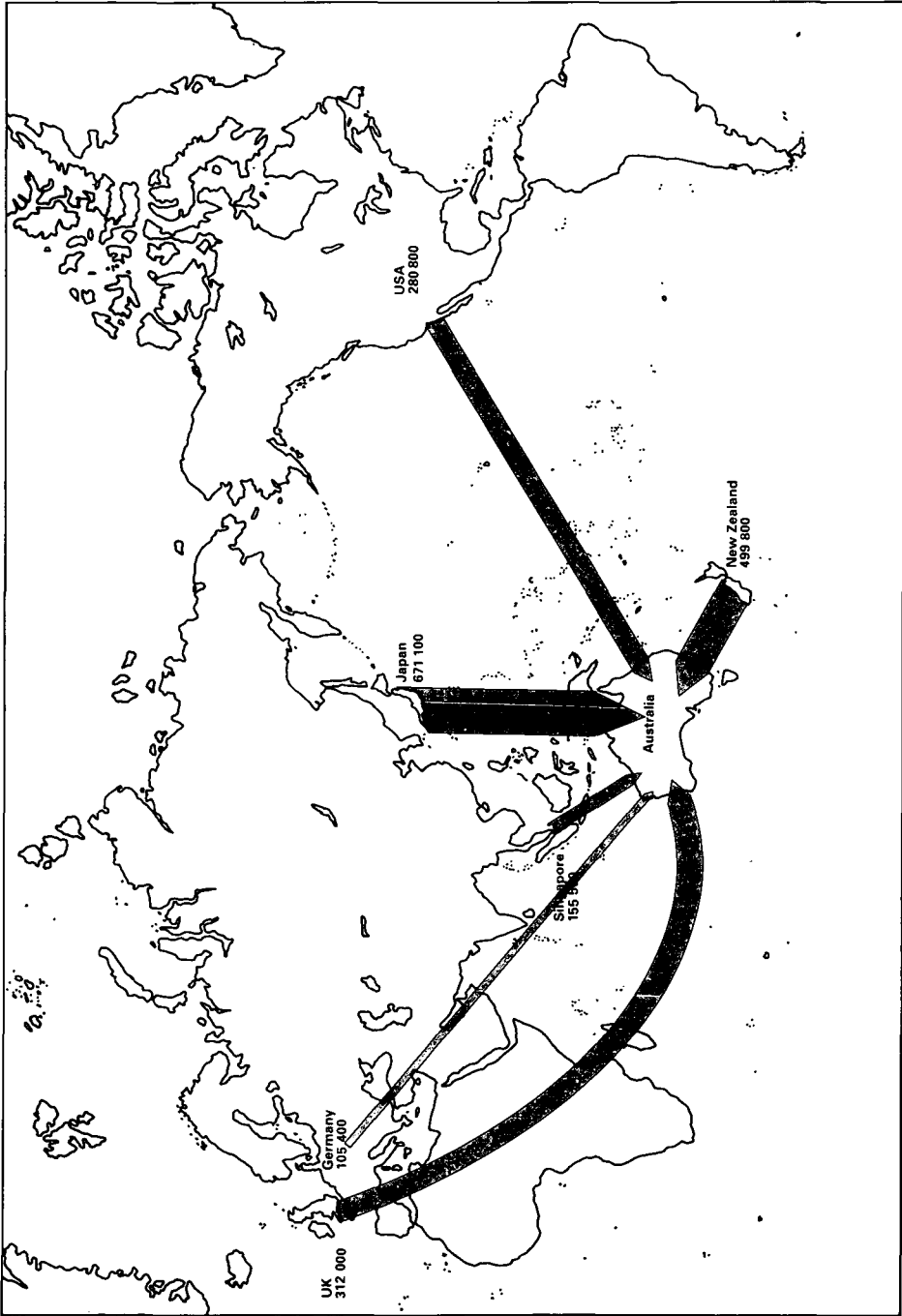
13.6 SHORT-TERM TRAVELLERS: ARRIVALS OF OVERSEAS VISITORS AND DEPARTURES OF AUSTRALIAN RESIDENTS, BY COUNTRY OF RESIDENCE/INTENDED STAY AND INTENDED LENGTH OF STAY, 1993p

Country of residence (visitors) and country of intended stay (residents)	Arrivals of overseas visitors intended length of stay					Departures of Australian residents intended length of stay				
	Under 1 week	1 week & under 1 month	1 month & under 3 months	3 months & under 12 months	Total	Under 1 month	1 month & under 3 months	3 months & under 12 months	Total	
Oceania and Antarctica										
Fiji	5,300	5,800	3,900	2,400	17,300	69,700	5,800	2,500	78,000	
New Caledonia	6,100	10,000	1,800	600	18,500	15,500	500	200	16,300	
New Zealand	172,400	280,000	33,100	14,300	499,800	314,600	27,100	8,700	350,400	
Papua New Guinea	16,200	15,800	5,400	3,000	40,400	24,600	5,900	4,900	35,400	
Other	6,800	6,400	4,200	2,800	20,200	55,800	5,700	2,400	63,900	
Total	206,800	317,900	48,400	23,100	596,100	480,300	44,900	18,700	543,900	
Europe, the former USSR & former Yugoslav Republics										
France	300	400	1,100	1,500	3,400	900	4,400	2,600	7,900	
Germany	7,900	12,900	7,500	2,500	30,700	10,300	13,200	4,000	27,500	
Greece	14,600	37,900	42,700	10,200	105,400	12,800	15,100	6,400	34,300	
Ireland	1,000	1,200	2,500	2,100	6,800	4,500	12,100	12,800	29,500	
Italy	800	3,300	4,500	2,300	10,900	2,600	7,300	1,500	11,400	
Netherlands	3,600	14,500	9,800	3,800	31,700	9,100	20,800	12,400	42,300	
Switzerland	2,400	9,200	11,900	4,000	27,500	4,300	6,700	2,900	13,800	
United Kingdom	3,000	9,700	11,900	5,900	30,600	3,100	4,000	1,600	8,800	
Other	30,300	130,800	108,500	42,500	312,000	62,500	128,100	49,400	240,000	
Total	73,700	252,300	222,700	89,000	637,600	125,000	243,400	111,500	479,900	
South East Asia										
Indonesia	22,800	35,900	6,800	6,400	71,900	176,700	17,500	6,800	201,000	
Malaysia	24,800	40,200	8,200	7,000	80,200	55,500	20,000	7,900	83,400	
Philippines	5,200	6,500	2,800	3,500	17,900	24,200	13,700	3,600	41,500	
Singapore	47,800	92,200	9,300	6,200	155,500	78,300	12,500	6,200	96,900	
Thailand	25,400	15,100	2,900	3,200	46,700	59,100	8,400	4,200	71,700	
Other	1,400	3,800	1,500	2,500	9,100	11,900	17,400	5,700	34,900	
Total	127,400	193,700	31,400	28,800	381,200	405,500	89,500	34,400	529,500	
North-east Asia										
Hong Kong	17,700	57,500	9,000	7,500	91,700	85,200	26,400	19,100	130,700	
Japan	318,200	328,500	10,400	14,000	671,100	31,800	6,500	7,500	45,800	
Other	78,600	93,700	9,100	12,700	194,000	40,100	19,300	7,800	67,300	
Total	414,500	479,700	28,400	34,200	956,800	157,200	52,200	34,300	243,700	
Southern Asia										
India	1,400	4,000	2,300	1,900	9,700	7,700	10,400	4,700	22,800	
Other	700	2,100	1,600	1,700	6,100	6,200	7,600	2,800	16,600	
Total	2,100	6,100	3,900	3,700	15,800	13,900	18,000	7,500	39,400	
The Americas										
Canada	5,700	24,100	14,200	6,400	50,500	13,200	13,400	4,700	31,300	
USA(a)	58,700	176,100	32,100	13,800	280,800	203,300	72,700	23,100	299,200	
Other	2,500	6,100	2,500	2,200	13,300	5,300	7,000	4,500	16,800	
Total	67,000	206,300	48,900	22,400	344,500	221,800	93,100	32,300	347,200	
Africa (excl. North Africa)										
South Africa	3,600	12,400	8,800	2,500	27,300	5,400	5,300	2,300	13,000	
Other	1,800	3,400	2,900	1,200	9,300	7,200	6,200	2,500	15,900	
Total	5,400	15,900	11,700	3,600	36,600	12,600	11,500	4,800	29,000	
Middle East & North Africa	2,700	7,000	6,300	5,100	21,000	10,200	18,300	18,400	46,900	
Total(b)	902,400	1,481,000	402,400	210,500	2,996,300	1,431,400	572,800	263,000	2,267,200	

(a) Includes America undefined. (b) Includes other and not stated.

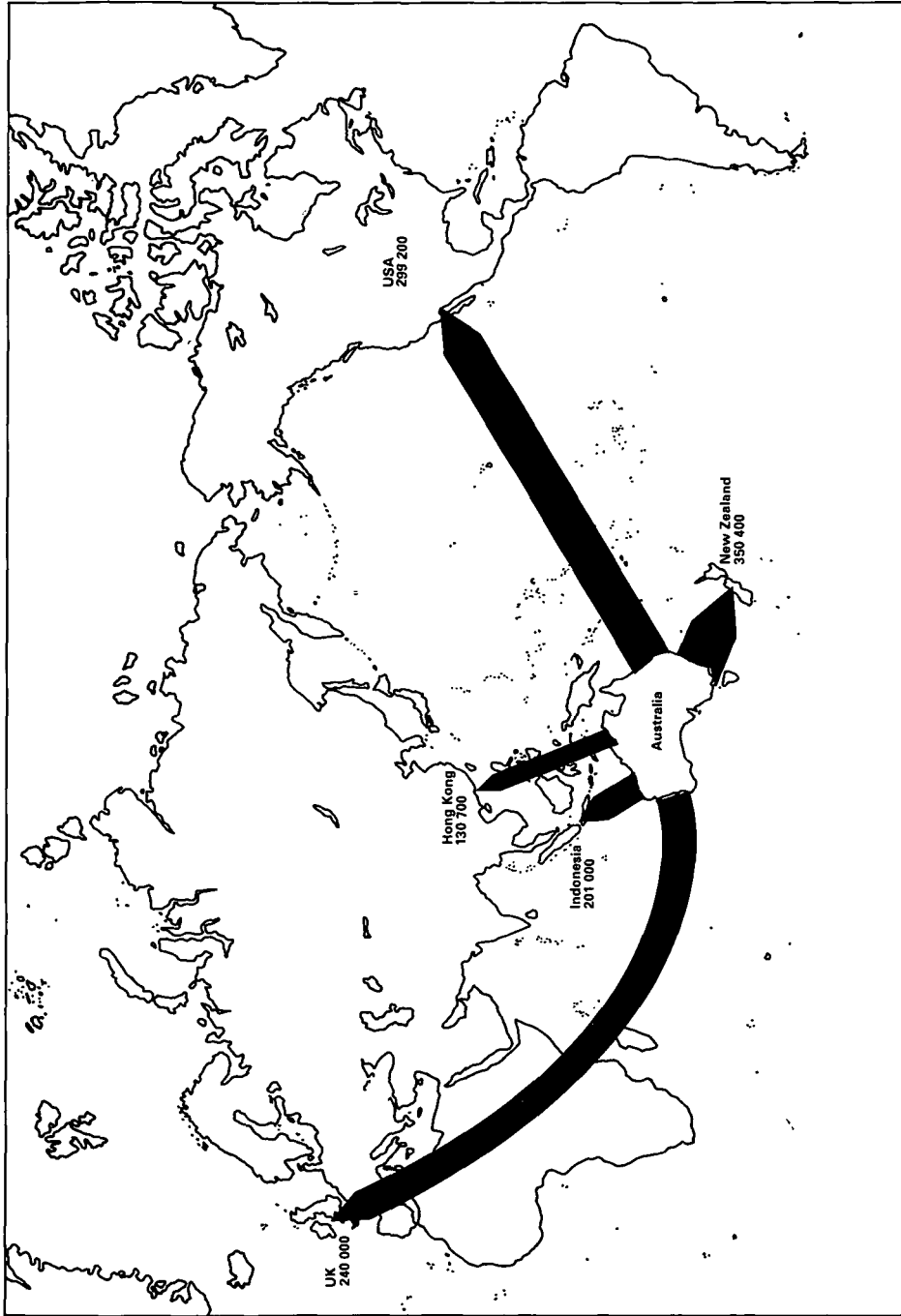
Source: Overseas Arrivals and Departures (3404.0) and unpublished ABS series.

13.7 OVERSEAS VISITORS TO AUSTRALIA(a), 1993p



(a) Length of stay in Australia — under 1 week to less than 12 months.
Source: Overseas Arrivals and Departures, Australia (3404.0) and unpublished ABS series.

13.8 AUSTRALIAN TRAVELLERS OVERSEAS(a), 1993p



(a) Length of stay overseas — under 1 month to less than 12 months.
Source: Overseas Arrivals and Departures, Australia (3404.0) and unpublished ABS series.

International visitor expenditure

Estimates of 1992 expenditure in Australia by country of residence are shown in the following table. Japanese tourists had the highest average expenditure per day at \$143 in 1992 but had the shortest average length

of stay at nine days, whereas visitors from the United Kingdom and Ireland had the lowest expenditure per day at \$47 but had the longest average length of stay of 47 days. The average length of stay of all international visitors was 25 days while the average daily expenditure in Australia was \$69.

13.9 INTERNATIONAL VISITORS(a): EXPENDITURE IN AUSTRALIA BY COUNTRY OF RESIDENCE, 1992

	Country of residence								Total
	USA	Japan	Other Asia	Canada	New Zealand	UK and Ireland	Other Europe	Other countries	
Average total expenditure \$(b)	1,901	1,241	2,315	2,056	1,100	2,174	2,463	1,697	1,760
Average stay (days)	25	9	32	38	17	47	41	28	25
Average expenditure per day \$(b)	76	143	73	54	63	47	61	61	69
Total nights in Australia (million)	6.2	5.6	13.6	1.9	7.4	13.0	10.5	3.7	61.8

(a) Visitors aged 15 years and over. (b) Excludes expenditure on international airfares and inclusive package expenditure purchased outside Australia.

Source: Bureau of Tourism Research, International Visitor Survey, 1992.

Domestic travel

In 1992-93 the main purposes of domestic trips were pleasure or holiday (39%), visiting friends or relatives (29%), and business (16%). The main mode of transport used was private vehicle (78%). The mean length of a trip by domestic tourists was 4.4 nights in 1992-93 (table 13.10)

Table 13.11 shows that the main destination of domestic travellers was New South Wales, followed by Queensland. The main purpose of travel was for pleasure and holidays, with visiting friends and relatives the next most frequent purpose.

13.10 SUMMARY OF PERSON TRIPS AND NIGHTS AWAY(a), 1992-93

State/Territory of origin	Estimated population(a) as at 30 June 1993 '000	Person trips '000	Average trips per person	Total nights away '000	Nights away per person trip
New South Wales	4,718.8	14,825	3.1	64,855	4.4
Victoria	3,519.7	10,456	3.0	44,690	4.3
Queensland	2,417.5	10,281	4.3	43,336	4.2
South Australia	1,161.9	4,097	3.5	19,418	4.7
Western Australia	1,295.4	5,175	4.0	24,353	4.7
Tasmania	364.2	1,685	4.6	6,407	3.8
Northern Territory	121.3	356	2.9	2,296	6.4
Australian Capital Territory	231.5	1,003	4.3	5,049	5.0
Total(b)	13,830.3	47,878	3.5	210,404	4.4

(a) For persons aged 15 years and over. (b) Total includes 'not stated'.

Source: Bureau of Tourism Research, Domestic Tourism Monitor, 1992-93.

**13.11 NUMBER OF NIGHTS SPENT IN STATE OF MAIN DESTINATION
BY MAIN PURPOSE OF TRIP, 1992-93**
(^{'000} nights)

<i>State/Territory of main destination</i>	<i>Main purpose of trip</i>				<i>Total(a)</i>
	<i>All business</i>	<i>Pleasure/ holiday</i>	<i>Visiting friends/ relatives</i>	<i>Other</i>	
New South Wales	7,811	29,553	19,331	7,856	64,551
Victoria	4,087	16,555	10,211	4,583	35,435
Queensland	6,820	27,687	13,091	6,401	53,999
South Australia	2,316	7,871	3,522	2,371	16,081
Western Australia	5,258	10,474	5,091	3,440	24,264
Tasmania	672	3,861	1,720	1,042	7,296
Northern Territory	904	2,280	492	972	4,646
Australian Capital Territory	1,007	1,130	1,207	786	4,131
Total(a)	28,874	99,411	54,666	27,454	210,404

(a) Differences between the sums of components and totals are due to rounding.

Source: Bureau of Tourism Research, *Domestic Tourism Monitor*, 1992-93.

In 1992-93, the most frequently used accommodation by domestic travellers was the home of friends or relatives (44% of visitor nights), followed by hotels or motels with

facilities (18%) and caravan parks or camping grounds (14%). The following table classifies the types of accommodation used for all visitor nights by the main purpose of the trip.

**13.12 NUMBER OF VISITOR NIGHTS, BY ACCOMMODATION USED
BY MAIN PURPOSE OF TRIP, 1992-93**
(^{'000} visitor nights)

<i>All accommodation used</i>	<i>Main purpose of trip</i>				<i>Total(a)</i>
	<i>All business</i>	<i>Pleasure/ holiday</i>	<i>Visiting friends/ relatives</i>	<i>Other</i>	
Hotel/motel with facilities	10,776	19,537	2,836	4,358	37,509
Hotel/motel without facilities	1,074	1,850	257	346	3,528
Friends'/relatives' house	5,646	28,360	46,251	12,118	92,375
Caravan/tent/cabin/camping	1,748	22,114	1,821	2,917	28,600
Rented house/flat	1,592	10,222	1,027	1,073	13,914
Own holiday home/flat	724	5,911	519	1,155	8,311
Guest house/private hotel	659	1,792	212	599	3,263
Farm	565	895	869	492	2,822
Boat/cabin cruiser	28	398	7	27	461
Hostel	450	741	46	511	1,748
Other/not stated	5,610	7,592	820	3,855	17,874
Total(a)	28,874	99,411	54,666	27,454	210,404

(a) Differences between the sums of components and totals are due to rounding.

Source: Bureau of Tourism Research, *Domestic Tourism Monitor*, 1992-93.

13.13 TOURIST ACCOMMODATION(a)

		Quarter ended			
		March 1993	June 1993	September 1993	December 1993
LICENSED HOTELS WITH FACILITIES(b)					
Establishments	number	1,183	1,196	1,185	1,138
Guest rooms	number	65,114	66,305	66,348	66,517
Bed spaces	number	171,024	174,671	174,935	175,476
Room occupancy rates	per cent	55.4	52.3	56.1	61.0
Bed occupancy rates	per cent	35.4	32.6	35.4	39.0
Gross takings from accommodation	\$'000	326,653	315,612	344,815	391,787
MOTELS, etc.(b)					
Establishments	number	3,709	3,750	3,739	3,694
Guest rooms	number	101,081	100,701	100,670	100,226
Bed spaces	number	304,537	304,225	304,200	302,890
Room occupancy rates	per cent	50.6	49.8	53.4	51.9
Bed occupancy rates	per cent	31.5	29.7	32.3	31.5
Gross takings from accommodation	\$'000	305,827	296,315	327,348	317,754
TOTAL HOTELS AND MOTELS etc.(b)					
Establishments	number	4,892	4,946	4,924	4,832
Guest rooms	number	166,195	167,006	167,018	166,743
Bed spaces	number	475,561	478,896	479,135	478,366
Room occupancy rates	per cent	52.5	50.5	54.5	55.5
Bed occupancy rates	per cent	32.9	30.7	33.5	34.2
Gross takings from accommodation	\$'000	632,480	611,927	672,163	709,542
CARAVAN PARKS(c)					
Establishments	number	2,681	2,681	2,695	2,704
Powered sites	number	202,478	202,753	203,905	204,059
Unpowered sites	number	69,722	69,375	69,198	69,270
Cabins, flats etc.	number	14,260	14,545	14,763	14,971
Total capacity	number	286,460	286,673	287,866	288,300
Site occupancy rates(d)	per cent	44.7	42.1	43.2	42.4
Gross takings from accommodation	\$'000	110,967	96,971	104,374	108,504
HOLIDAY FLATS, UNITS AND HOUSES(b)					
Flats, units etc.					
One bedroom	number	7,773	7,665	7,733	7,986
Multiple bedroom	number	26,548	26,110	26,726	27,500
Total flats, units etc.	number	34,321	33,775	34,459	35,486
Bed spaces	number	148,464	146,251	148,721	154,103
Unit occupancy rates	per cent	54.8	44.3	55.3	51.1
Gross takings from accommodation	\$'000	105,561	75,462	99,577	102,697
VISITOR HOSTELS(e)					
Establishments	number	404	397	410	414
Bed spaces	number	24,943	24,680	24,681	24,960
Bed occupancy rates	per cent	44.8	39.3	43.9	43.2
Gross takings from accommodation	\$'000	11,497	10,479	11,511	11,694

(a) A tourist accommodation establishment is defined as an establishment which predominantly provides short-term accommodation (that is, for periods of less than two months) available to the general public. (b) For definitions see *Tourist Accommodation, Australia* (8635.0). (c) Includes long-term caravan parks. For definitions see *Tourist Accommodation, Australia* (8635.0). (d) From September quarter 1992, caravan park sites etc. permanently reserved but only casually occupied by their tenants have been recorded continuously as site nights occupied irrespective of whether the tenants of individual sites were in residence on any particular night. Occupancy measures from September quarter 1992 are therefore not comparable with those from previous quarters. (e) 'Backpacker' accommodation.

Source: *Tourist Accommodation, Australia* (8635.0).

Tourist accommodation

The preceding section contains statistics on accommodation of all types used by domestic travellers. This section relates to commercial tourist accommodation used by domestic and international travellers.

New South Wales is the State with the most commercial tourist accommodation available. At December 1993, 34 per cent (56,901 guest rooms) of Australia's tourist accommodation capacity in hotels, motels and guest houses with facilities was in New South Wales, with 45 per cent (25,503 guest rooms) of the State's capacity concentrated in the Sydney Statistical Division. Queensland had 24 per cent (40,125 guest rooms), and Victoria had 18 per cent (30,265 guest rooms) of Australia's accommodation capacity.

In the three months to 31 December 1993, 36 per cent of room nights occupied in Australia were taken in four and five star graded accommodation. This figure demonstrates the continuation of an increasing market share for higher rated accommodation, evident since 1986 (then 23%).

During 1993, the supply of hotel, motel and guest house accommodation in Australia grew more slowly than demand. The number of guest rooms available increased by less than 0.1 per cent in the year to 31 December 1993, while room nights occupied increased by 7.6 per cent over the same period. The comparative rates for 1992 were 2.9 per cent for rooms available and 4.3 per cent for room nights occupied.

Table 13.13 provides further details of tourist accommodation.

Inbound tourism

During 1993, an ABS Survey of Inbound Tourism Operators collected data on the Australian ground content (for example, coach transfers, accommodation, meals, cruises, etc.) of Australian tours sold overseas.

In 1992–93 passengers from Japan accounted for 47.1 per cent of a total of 1.2 million passengers involved and 53.5 per cent of the total value of gross invoices of \$958 million (that is, all amounts received for ground content received in Australia). In fact, passengers from Asia (including Japan) represented 78.2 per cent of total passengers

and accounted for 76.1 per cent of the total value of gross invoices.

North America accounted for 6.7 per cent of passengers and 8.8 per cent of the total value of gross invoices, Europe (including the United Kingdom and Ireland) for 8.8 per cent of passengers and 9.8 per cent of gross invoices, and New Zealand and the South Pacific for 5.8 per cent of passengers and 4.7 per cent of the total value of gross invoices.

The survey also showed that inbound tour operators employed 2,170 persons full time and 520 persons part time in Australia. In addition, they employed 230 persons full time overseas.

Overseas tourism marketing expenditure

An ABS Survey of Overseas Tourism Marketing Expenditure for 1992–93 revealed that 27.5 per cent of the total expenditure of \$190 million was directed towards the Japanese market, 26.7 per cent towards the United Kingdom and Europe, 23.7 per cent towards the United States of America and Canada, and 13.9 per cent towards Asia (excluding Japan).

Of this overseas tourism marketing expenditure, the majority (77.5%) was by independent operators, while 10.8 per cent was in cooperation with the Australian Tourism Commission and 11.6 per cent was in cooperation with other organisations.

Of the total overseas tourism marketing expenditure, 16.9 per cent was by accommodation operators, 15.7 per cent by inbound tour operators, 10.1 per cent by State tourism authorities, and 4.8 per cent by coach operators.

Australian Tourist Commission

The Commission (ATC) is a statutory authority under the *Australian Tourist Commission Act 1987*. Its role is to increase the number of visitors to Australia, to maximise for Australia the benefits from overseas visitors and to ensure that Australia is protected from adverse environmental and social impacts of international tourism.

The Commission engages in a wide variety of marketing activities including consumer and

trade advertising, in both print and television media, direct mail, market research, industry seminars and familiarisation visits for journalists and photographers. These activities are carried out in cooperation with State and Territory tourism authorities as well as the Australian and overseas travel industries. Advertising designed to promote Australia as a friendly, exciting and safe tourist destination provides a marketing umbrella for the States, Territories and industry, and is placed in various tourist markets at times selected to achieve maximum awareness of Australia as a tourist destination.

Current marketing initiatives include the introduction of a special 'theme years' campaign. It began in 1993 with the theme 'Discover the Year of Sport', continuing with: 1994, 'Discovering the Great Australian Outdoors'; 1995, 'Celebrate Australian Art and Culture'; 1996, 'Experience the Festivals of Oz'; and ending in 1997 with 'Enjoy Good Living Down Under'.

Overseas offices of the ATC are located in London, Frankfurt, Los Angeles, New York, Singapore, Tokyo, Osaka, Hong Kong and Auckland.

BIBLIOGRAPHY

ABS Publications

Domestic Travel and Tourism Survey, Australia (9216.0)

Overseas Arrivals and Departures, Australia (3404.0) — annual

Overseas Arrivals and Departures, Australia (3401.0) — monthly

Selected Accommodation Establishments, Australia (8636.0)

Tourist Accommodation, Australia (8635.0)

Other Publications

BUREAU OF TOURISM RESEARCH. *Domestic Tourism Monitor, 1992-93*

BUREAU OF TOURISM RESEARCH. *International Visitor Survey, 1992*

FOR MORE INFORMATION

The ABS has a far wider range of information on Australia than that contained in the *Year Book*. Information is available in the form of regular publications, electronic data services, special tables and from investigations of published and unpublished data.

For further information contact ABS Information Services at one of the addresses listed on the page facing the Introduction to the *Year Book*.