

Tourism

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Tourism

Introduction

Tourism encompasses most 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.

Tourism

Economic importance

Just as tourism is a dominant force in the global economy, it is also one of Australia's largest and most dynamic sectors of commerce. 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 expenditure by tourists directly and indirectly contributed 6.6% to Gross Domestic Product in 1993–94 and accounted for some 500,000 jobs (6.6% of total employment).

In 1993–94 total expenditure derived from tourism was around \$43,600 million, of which \$33 million was attributed to domestic tourism. Foreign exchange earnings from international tourism to Australia were estimated to be about \$10,600 million. This amounted to about 12% of Australia's total current account credits.

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% 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% 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 but there was slight increase to 211.4 million in 1993–94.

The number of international visitors to Australia increased at a rate of 25% per annum from 1984 to 1988. However, 1989 saw a 7.5% 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% to 2.2 million in 1990 and thereafter increased to new record levels of 2.4 million in 1991, 2.6 million in 1992, 3.0 million in 1993 and 3.4 million in 1994, with annual growth rates of 7.0, 9.8, 15.1 and 12.2% 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 as long-term or short-term on the basis of 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*.

Statistics of short-term arrivals and departures are given below. Statistics of permanent and long-term movement are shown in *Chapter 5, Demography*.

Short-term movement comprises 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 respectively.

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, 1981-1994

	Overseas visitors		Australian residents	
	Arriving in Australia	Departing from Australia	Departing from Australia	Returning to Australia
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	2 996 200	2 931 000	2 267 100	2 215 200
1994	3 361 700	3 314 200	2 354 300	2 302 500

Source: *Overseas Arrivals and Departures, Australia, 1994* (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 presented 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, 1994

	Overseas visitors		Australian residents	
	Arriving	Departing	Departing	Returning
January	250 500	327 400	149 900	275 000
February	304 300	279 100	150 300	159 600
March	307 400	302 200	192 000	158 200
April	255 100	276 400	185 100	170 700
May	214 900	250 400	184 500	157 800
June	230 900	217 400	228 800	167 700
July	282 500	239 400	219 000	240 800
August	265 400	298 000	180 000	190 400
September	254 000	236 400	241 500	214 800
October	301 600	272 200	184 300	254 200
November	311 000	311 500	174 600	173 100
December	384 000	303 900	264 500	140 300
Total(a)	3 361 700	3 314 200	2 354 300	2 302 500

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

Source: *Overseas Arrivals and Departures, Australia, 1994 (3401.0)*.

In 1994, the majority of Australian residents departing for short-term visits abroad intended to stay for under three weeks (52%). Residents intending to stay abroad for under two months accounted for 80% of Australian residents departing for short-term visits (table 13.3). Of short-term visitors to Australia, 61% intended to stay under two weeks; 90% intended to stay under two months (table 13.4).

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. Tables 13.6 and 13.7 provide statistics on short-term travellers classified by country.

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.

13.3 Short-term travellers — departures of Australian residents, 1994

Intended length of stay	Main purpose of journey						Total(a)
	Visiting friends or relatives	Holiday	Convention/conference	Business	Employment	Other & not stated	
Under 1 week	22 900	75 300	14 100	118 300	3 300	11 900	245 800
1 week & under 2 weeks	62 000	345 900	28 200	113 800	3 200	24 500	577 600
2 weeks & under 3 weeks	73 000	225 100	12 300	63 700	3 300	15 900	393 400
3 weeks & under 1 month	64 100	113 500	5 900	27 000	4 000	9 000	223 600
1 month & under 2 months	163 300	202 300	4 800	39 900	6 100	17 700	434 000
2 months & under 3 months	75 100	79 500	1 100	16 600	4 500	8 800	185 600
3 months & under 6 months	66 400	60 200	300	16 400	10 100	11 700	165 200
6 months & under 12 months	34 400	41 900	100	12 500	21 100	19 000	129 100
Total(a)	561 200	1 143 700	66 900	408 300	55 700	118 600	2 354 300

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

Source: *Overseas Arrivals and Departures, Australia, 1994 (3404.0)*.

13.4 Short-term travellers — arrivals of overseas visitors, 1994

Intended length of stay	Main purpose of journey						Total(a)
	Visiting friends or relatives	Holiday	Convention/conference	Business	Employment	Other & not stated	
Under 1 week	50 800	691 600	19 600	141 300	3 600	93 800	1 000 600
1 week & under 2 weeks	103 900	777 600	30 500	100 600	4 500	34 200	1 051 300
2 weeks & under 3 weeks	102 100	247 000	10 300	37 600	1 000	10 600	408 700
3 weeks & under 1 month	78 600	120 000	2 200	9 300	400	5 200	215 400
1 month & under 2 months	149 900	153 500	1 700	15 400	2 300	12 600	335 400
2 months & under 3 months	47 000	39 500	300	6 400	1 400	7 900	102 500
3 months & under 6 months	49 000	43 100	200	6 100	3 100	17 800	119 300
6 months & under 12 months	23 700	37 100	100	5 300	10 700	48 700	125 600
Not stated	—	—	—	—	—	3 000	3 000
Total(a)	605 000	2 109 000	64 900	321 900	27 000	150 500	3 361 700

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

Source: Overseas Arrivals and Departures, Australia, 1994 (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, 1994 (%)

	Country of residence							Total
	USA & Canada	• Japan	Other Asia	New Zealand	UK & Ireland	Other Europe	Other countries	
New South Wales	29	38	41	42	39	28	49	37
Victoria	20	7	22	8	11	16	17	16
Queensland	28	40	14	33	23	27	19	24
South Australia	7	2	3	3	5	7	4	4
Western Australia	7	6	14	9	15	10	5	11
Tasmania	3	1	1	1	1	2	2	2
Northern Territory	5	5	1	2	4	8	2	4
Australian Capital Territory	1	1	5	2	1	2	3	2
Australia	100	100	100	100	100	100	100	100

Source: Bureau of Tourism Research, International Visitor Survey, 1994.

13.6 Short-term travellers — arrivals of overseas visitors, 1994

Country of residence	Intended length of stay				Total(a)(b)
	Under 1 week	1 week & under 1 month	1 month & under 3 months	3 months & under 12 months	
Oceania & Antarctica					
Fiji	5 700	6 700	4 300	2 600	19 500
New Caledonia	5 700	12 400	1 600	400	20 200
New Zealand	160 200	266 200	37 900	15 900	480 400
Papua New Guinea	16 500	16 800	5 300	3 400	41 900
Other	7 300	9 600	3 900	3 400	24 300
Total(b)	195 400	311 800	53 100	25 700	586 200
Europe					
The former USSR & former Yugoslav Republics	1 200	5 300	2 600	2 800	12 000
France	6 800	15 600	8 600	3 600	34 500
Germany	15 300	49 700	47 400	10 200	122 700
Greece	900	1 600	2 500	2 000	7 000
Ireland	800	5 000	5 300	3 900	15 200
Italy	3 800	17 200	11 300	4 300	36 700
Netherlands	2 700	10 900	12 700	4 700	30 900
Switzerland	4 400	11 700	13 600	6 600	36 400
United Kingdom	31 700	145 800	110 500	46 900	335 300
Other	9 800	40 400	25 600	14 700	90 600
Total(b)	77 500	303 200	240 000	99 700	721 200
South-east Asia					
Indonesia	37 600	50 300	8 300	9 400	105 700
Malaysia	31 200	46 400	9 200	8 100	95 100
Philippines	5 200	9 000	3 600	3 700	21 700
Singapore	58 500	112 800	9 600	6 700	187 600
Thailand	36 800	22 300	3 700	3 900	66 800
Other	1 700	5 400	1 600	2 300	10 900
Total(b)	171 000	246 200	35 900	34 100	487 800
North-east Asia					
Hong Kong	19 200	71 900	10 500	7 800	109 500
Japan	343 600	348 800	11 500	17 000	721 100
Other	119 300	136 100	12 400	17 500	285 800
Total(b)	482 100	556 800	34 400	42 300	1 116 400
Southern Asia					
India	1 800	5 200	2 200	2 800	12 100
Other	700	3 300	1 800	1 800	7 600
Total(b)	2 500	8 500	4 000	4 600	19 600
The Americas					
Canada	5 700	26 600	14 200	7 700	54 300
USA(c)	52 800	184 200	36 100	16 300	289 700
Other	2 900	8 800	3 100	2 800	17 600
Total(b)	61 400	219 700	53 400	26 900	361 600
Africa (excl. North Africa)					
South Africa	5 800	13 600	7 500	3 300	30 300
Other	2 000	5 300	3 600	1 500	12 300
Total(b)	7 800	18 900	11 100	4 800	42 600
Middle East & North Africa	2 400	9 100	5 800	6 500	23 900
Total(d)	1 000 600	1 675 400	437 900	244 800	3 361 700

(a) Includes not stated. (b) Differences between sums of components and totals are due to rounding. (c) Includes America undefined. (d) Includes other and not stated.

Source: Overseas Arrivals and Departures, Australia, 1994 (3401.0).

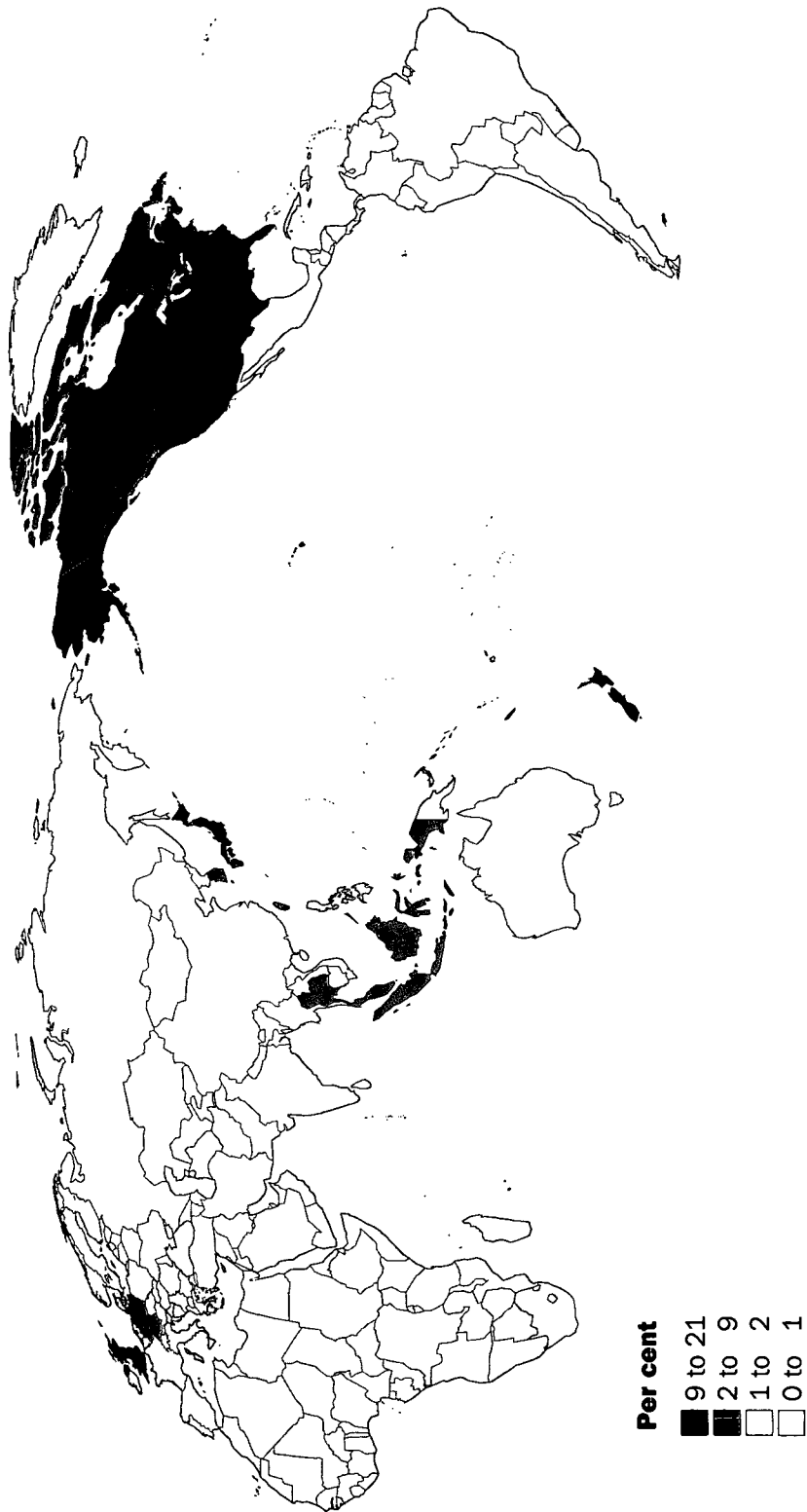
13.7 Short-term travellers — departures of Australian residents, 1994

Country of intended stay	Intended length of stay			Total(a)(b)
	Under 1 month	1 month & under 3 months	3 months & under 12 months	
Oceania & Antarctica				
Fiji	74 100	6 100	2 800	82 900
New Caledonia	14 000	400	300	14 700
New Zealand	315 900	28 600	8 800	353 300
Papua New Guinea	23 400	6 600	5 000	35 000
Other	57 500	5 400	2 600	65 600
Total(b)	484 800	47 200	19 500	551 500
Europe				
The former USSR & former Yugoslav Republics	2 900	10 900	7 500	21 300
France	10 400	13 300	4 200	27 900
Germany	11 600	14 800	5 900	32 300
Greece	4 000	14 700	15 200	33 800
Ireland	3 000	8 400	2 100	13 600
Italy	10 600	22 600	11 900	45 100
Netherlands	4 000	7 600	2 800	14 300
Switzerland	4 500	4 400	1 500	10 400
United Kingdom	67 500	134 400	52 600	254 500
Other	13 900	29 000	16 600	59 500
Total(b)	132 300	260 100	120 300	512 700
South-east Asia				
Indonesia	189 000	17 700	7 500	214 200
Malaysia	56 100	19 300	9 100	84 500
Philippines	27 300	15 900	4 100	47 300
Singapore	75 100	9 900	6 700	91 700
Thailand	58 500	8 600	4 800	71 800
Other	13 600	21 400	7 400	42 400
Total(b)	419 500	92 800	39 500	551 800
North-east Asia				
Hong Kong	78 200	29 300	23 000	130 400
Japan	30 500	5 500	6 600	42 600
Other	43 400	25 700	11 900	81 100
Total(b)	152 000	60 500	41 600	254 100
Southern Asia				
India	9 500	12 600	4 900	27 000
Other	7 400	9 100	3 000	19 600
Total(b)	17 000	21 700	7 900	46 600
The Americas				
Canada	16 400	16 500	6 500	39 500
USA(c)	184 800	78 200	25 200	288 300
Other	6 000	8 200	6 200	20 400
Total(b)	207 300	102 900	37 900	348 100
Africa (excl. North Africa)				
South Africa	6 600	6 400	2 700	15 700
Other	5 900	5 800	3 100	14 700
Total(b)	12 500	12 200	5 700	30 400
Middle East & North Africa	9 700	21 000	21 000	51 700
Total(d)	1 440 400	619 600	294 300	2 354 300

(a) Includes not stated. (b) Differences between sums of components and totals are due to rounding. (c) Includes America undefined. (d) Includes other and not stated.

Source: Overseas Arrivals and Departures, 1994 (3404.0).

13.8 Country of residence of overseas visitors to Australia, 1994



13.9 Overseas destination of Australian travellers, 1994



International visitor expenditure

Estimates of 1994 expenditure in Australia by country of residence are shown in table 13.10. Japanese tourists had the highest average expenditure per day at \$197 in 1994 but had the shortest average length of stay at eight days, whereas visitors from the United

Kingdom and Ireland had the lowest expenditure per day at \$43 but had the longest average length of stay of 45 days. The average length of stay of all international visitors was 24 days while the average daily expenditure in Australia was \$79.

13.10 International visitors(a), 1994

	Country of residence							All countries
	USA & Canada	Japan	Other Asia	New Zealand	UK & Ireland	Other Europe	Other countries	
Average total expenditure (\$)(b)	1 939	1 645	2 191	1 027	1 952	2 600	1 934	1 886
Average stay (days)	25	8	24	17	45	38	28	24
Average expenditure per day (\$)(b)	77	197	90	60	43	69	68	79
Total nights in Australia (million)	8	6	20	8	15	13	5	74

(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*, 1994.

Domestic travel

In 1993–94, the main purposes of domestic trips were pleasure or holiday (39%), visiting friends or relatives (29%), and business (18%). The main mode of transport used was private vehicle (78%). The mean length of a trip by domestic tourists was 4.4 nights in 1993–94 (table 13.11).

Table 13.12 shows that the main destination of domestic travellers was New South Wales, followed by Queensland. Domestic travel in Australia is dominated by intrastate travel which accounted for 74% of all domestic trips undertaken in 1993–94.

13.11 Summary of person trips and nights away(a), 1993–94

State/Territory of origin	Estimated population as at 30 June 1994 ('000)	Person trips ('000)	Average trips per person	Total nights away ('000)	Nights away per person trip
New South Wales	4 761	14 280	3	61 926	4
Victoria	3 536	11 235	3	47 767	4
Queensland	2 489	10 199	4	43 703	4
South Australia	1 168	3 803	3	17 298	5
Western Australia	1 318	5 250	4	25 568	5
Tasmania	366	1 618	4	6 268	4
Northern Territory	124	383	3	3 018	8
Australian Capital Territory	234	1 345	6	5 826	4
Total(b)	13 997	48 113	3	211 373	4

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

Source: Bureau of Tourism Research, *Domestic Tourism Monitor, Summary*, 1993–94.

13.12 Nights spent in State of main destination by purpose of trip, 1993-94 (^{'000} nights)

	Main purpose of trip				Total(a)
	All business	Pleasure/ holiday	Visiting friends/ relatives	Other	
New South Wales	8 902	27 842	19 034	8 180	63 959
Victoria	4 144	16 639	11 132	5 636	37 551
Queensland	6 973	27 169	14 114	6 474	54 729
South Australia	2 034	6 946	4 259	2 588	15 827
Western Australia	4 518	10 303	5 504	3 859	24 185
Tasmania	722	3 463	1 723	1 095	7 005
Northern Territory	1 130	2 084	660	291	4 166
Australian Capital Territory	709	956	1 671	615	3 952
Total(a)	29 133	95 402	58 097	28 742	211 373

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

Source: Bureau of Tourism Research, *Domestic Tourism Monitor, Summary, 1993-94*.

In 1993-94, the most frequently used accommodation by domestic travellers was the home of friends or relatives (46% of visitor nights), followed by hotels or motels with bathroom facilities in the guest's room (17%)

and caravan parks or camping grounds (12%). The following table classifies the types of accommodation used for all visitor nights by the main purpose of the trip.

13.13 Accommodation used by main purpose of trip, 1993-94 (^{'000} nights)

	Main purpose of trip				Total(a)
	All business	Pleasure/ holiday	Visiting friends/ relatives	Other	
All accommodation used					
Hotel/motel with facilities	10 969	17 636	3 051	4 304	35 960
Hotel/motel without facilities	1 634	1 470	393	604	4 101
Friends'/relatives' house	6 376	28 617	49 807	12 047	96 847
Caravan/tent/cabin/camping	1 395	19 445	1 504	3 163	25 508
Rented house/flat	1 842	9 978	877	1 774	14 472
Own holiday home/flat	569	6 717	788	977	9 051
Guest house/private hotel	672	1 413	165	542	2 791
Farm	619	1 006	722	495	2 843
Boat/cabin cruiser	—	366	7	24	397
Hostel	407	756	108	1 100	2 371
Other/not stated	4 647	7 997	673	3 715	17 033
Total(a)	29 133	95 402	58 097	28 742	211 373

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

Source: Bureau of Tourism Research, *Domestic Tourism Monitor, 1993-94*.

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 1994, 34% (56,645 guest rooms)

of Australia's tourist accommodation capacity in hotels, motels and guest houses with facilities was in New South Wales, with 45% (25,245 guest rooms) of the State's capacity concentrated in the Sydney Statistical Division. Queensland had 24% (40,760 guest rooms), and Victoria had 18% (29,892 guest rooms) of Australia's accommodation capacity.

During 1994, the supply of hotel, motel and guest house accommodation in Australia grew more slowly than demand. The number of guest rooms available increased by 0.1% in the year to 31 December 1994, while room nights occupied increased by 6.4% over the same period. The comparative rates for 1993 were less than 0.1% for rooms available and 7.6% for room nights occupied.

In the three months to 31 December 1994, the average length of stay in licensed hotels with facilities was 2.3 days, for motels etc. 1.9 days, for visitor hostels 2.7 days but for holiday flats, units and houses it was 5.1 days.

Table 13.14 provides further details of tourist accommodation.

13.14 Tourist accommodation, 1994(a)

	Units	March quarter	June quarter	Sept. quarter	Dec. quarter
Licensed hotels with facilities(b)					
Establishments	no.	1 131	1 139	1 132	1 135
Guest rooms	no.	66 386	66 443	66 524	66 898
Bed spaces	no.	175 508	176 344	177 606	179 221
Room occupancy rates	%	61.1	57.7	63.0	65.8
Bed occupancy rates	%	38.9	35.7	39.9	40.8
Gross takings from accommodation	\$'000	385 605	362 964	409 128	450 458
Motels, etc.(b)					
Establishments	no.	3 684	3 700	3 674	3 684
Guest rooms	no.	99 876	100 227	99 883	100 065
Bed spaces	no.	302 063	303 246	301 775	303 251
Room occupancy rates	%	52.4	51.6	55.3	54.4
Bed occupancy rates	%	32.5	30.8	33.5	32.7
Gross takings from accommodation	\$'000	318 309	311 549	350 767	346 451
Total hotels & motels etc.(b)					
Establishments	no.	4 815	4 839	4 806	4 819
Guest rooms	no.	166 262	166 670	166 407	166 963
Bed spaces	no.	477 571	479 590	479 381	482 472
Room occupancy rates	%	55.9	54.1	58.4	59.0
Bed occupancy rates	%	34.8	32.6	35.9	35.8
Gross takings from accommodation	\$'000	703 914	674 513	759 895	796 910
Caravan parks(c)					
Establishments	no.	2 701	2 702	2 721	2 716
Powered sites	no.	204 045	204 124	204 010	204 327
Unpowered sites	no.	68 289	67 787	68 212	67 846
Cabins, flats etc.	no.	15 244	15 608	15 921	16 246
Total capacity	no.	287 578	287 519	288 143	288 419
Site occupancy rates(d)	%	45.2	43.1	44.0	42.7
Gross takings from accommodation	\$'000	117 097	100 865	109 837	113 981
Holiday flats, units & houses(b)					
Flats, units etc.					
One bedroom	no.	7 848	7 758	7 972	8 141
Multiple bedroom	no.	27 562	27 554	28 284	29 393
Total flats, units etc.	no.	35 410	35 312	36 256	37 534
Bed spaces	no.	154 325	153 381	156 912	163 586
Unit occupancy rates	%	56.1	45.1	57.1	52.6
Gross takings from accommodation	\$'000	116 167	84 752	116 042	120 412
Visitor hostels(e)					
Establishments	no.	426	417	422	433
Bed spaces	no.	25 748	25 061	25 634	26 063
Bed occupancy rates	%	45.3	40.6	43.6	45.1
Gross takings from accommodation	\$'000	12 560	11 031	12 425	13 590

(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) 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. (e) 'Backpacker' accommodation.

Source: Tourist Accommodation, Australia (8635.0).

Tourism viewed as an industry

Reference is often made to a Tourism industry. However, tourism is best seen statistically as a 'demand' side activity, defined in terms of the activities of a particular type of consumer. It involves the purchase or consumption by visitors of any commodity. It is therefore not confined to particular commodities or to particular economic activities on the 'supply' side. It could include for example, purchases of services from transport and tour operators, accommodation establishments, theme parks and attractions, entertainment and arts venues, museums and historical sites, cafes and restaurants, casinos, travel agents and retailers. Because of this, it is not an industry in the traditional sense of an industry comprising businesses mainly undertaking a similar economic activity.

However it is possible to identify from the Australian and New Zealand Standard Industrial Classification a number of tourism related industries. In 1991-92 the ABS conducted surveys of a limited number of tourism related industries, specifically:

- Accommodation
- Pubs bars and taverns
- Cafes and restaurants
- Licensed clubs
- Casinos
- Motor vehicle hire

The main results from those surveys are summarised in the table below:

13.15 Tourism-related industries — summary of operations, 1991-92

Businesses (\$m)	Businesses (No.)	Employment (Persons)	Income from sales of goods & services (\$m)	Operating profit before tax (\$m)
Accommodation	4 314	74 136	3 820	-319
Pubs, bars & taverns	4 347	73 526	5 834	98
Cafes & restaurants	8 741	120 752	4 608	148
Licensed clubs	3 811	60 424	3 729	178
Casinos	8	9 218	788	99
Motor vehicle hire	222	3 016	458	-7

Source: Hospitality Industries, Australia, 1991-92 (8674.0) and Motor Vehicle Hire Industry, Australia, 1991-92 (8652.0).

The ABS previously conducted a survey of these industries (with the exception of casinos) in respect of 1986-87. In the period from 1986-87 to 1992-93, employment in these industries increased 21%, which represented an annual average rate of growth of 4%.

In addition to the above industry surveys the ABS also undertook a survey of amusement and theme parks in respect of 1991-92. Broadly speaking, an amusement park is a centre which typically offers rides, games and shows for entertainment. A theme park is similar to an amusement park but provides a range of entertainments and/or displays organised around a specific theme. Amusement and theme parks were included

in the survey if they met the following criteria:

- the park was primarily a tourist attraction and operated on a commercial basis;
- its turnover was at least \$150,000 in 1991-92; and
- the park was permanently based at a fixed site which included attractions operating at one site on a seasonal basis.
- On the basis of the above, 72 amusement and theme parks were included in the survey and results from the survey are presented in table 13.16.

13.16 Amusement and theme parks — summary of operations

	Businesses (No.)	Employment (Persons)	Gross income (\$'000)	Visitors ('000 persons)
New South Wales	25	1 624	66 955	3 313
Victoria	18	588	19 215	1 948
Queensland	17	2 181	139 713	4 588
Other States & Territories	12	221	10 554	1 182
Total	72	4 614	236 437	11 031

Source: *Amusement and Theme Parks* (8675.0).

The four largest amusement and theme parks accounted for 60% of income, 45% of

employment and attracted 3,478,000 visitors in 1991–92.

Inbound tourism

During 1993–94, 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 1993–94, passengers from Japan accounted for 48.3% of a total of 1.4 million passengers involved and 53.4% of the total value of gross invoices of \$1,048 million (that is, all amounts received for ground content received in Australia). Passengers from Asia (including Japan) represented 77.3% of total passengers and accounted for 75.5% of the total value of gross invoices.

The Americas accounted for 7.0% of passengers and 10.5% of the total value of gross invoices, Europe (including the United Kingdom and Ireland) for 13.3% of passengers and 12.9% of gross invoices, and New Zealand and the South Pacific for 2.2% of passengers and 0.9% of the total value of gross invoices.

The survey also showed that inbound tour operators employed 2,350 persons full-time and 340 persons part-time in Australia. In addition, they employed 240 persons full-time overseas.

Overseas tourism marketing expenditure

An ABS Survey of Overseas Tourism Marketing Expenditure for 1992–93 revealed that 27.5% of the total expenditure of \$190 million was directed towards the Japanese market, 26.7% towards the United Kingdom and Europe,

23.7% towards the United States of America and Canada, and 13.9% towards Asia (excluding Japan).

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

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

Australian Tourist Commission

The Australian Tourist 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 trade shows and 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.

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