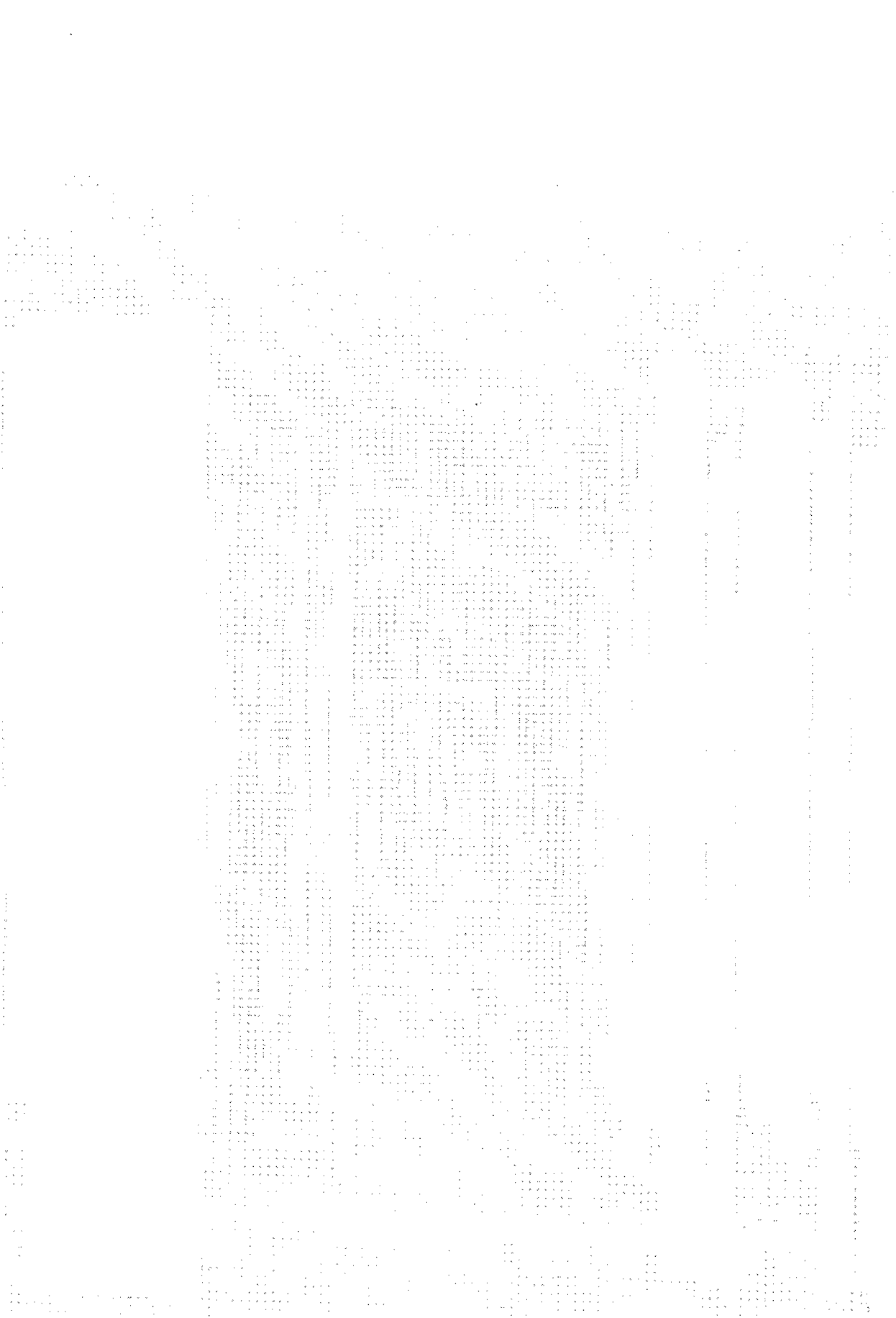

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Introduction

Tourism encompasses most short-term travel away from the normal place of work and residence, including travel undertaken for business and pleasure.

It is defined by the World Tourism Organisation (WTO) as: 'the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.'

This identifies 'tourism' as being more than just leisure travel. It also encompasses travel for business, health, education, religious and other reasons.

Tourism comprises both domestic and international travel. Its economic effects are both to generate economic activity and to transfer such activity across the country. As it involves the consumption or purchase by tourists — or 'visitors' in the WTO terminology — of any good or service, its economic impact ranges over many sectors of the economy. The impact of tourism is most directly felt by sectors such as transport and tour operators, accommodation establishments, theme parks and attractions, entertainment and arts venues, museums and historical sites, restaurants, travel agents and souvenir retailers. However, other sectors also benefit both directly and indirectly from tourism demand.

Tourism also draws on services provided by the Commonwealth Government, the State and Territory Governments and local government organisations without direct charge to tourists. These include 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.

While tourism has been an economic factor in Australia for a very long time, in recent times it has grown to the extent that it is now recognised as a major contributor to total economic activity. International tourism has experienced substantial growth in the past decade or so. This has focused the need for improved standards of facilities and service, and has contributed to a recognition that tourism covers a sophisticated set of economic

activities with great potential for future domestic and export earnings.

Because of Australia's island status far from most of its international source markets, tourism in this country will continue to be dominated by domestic tourism for the foreseeable future. Despite high annual growth rates, international tourism still only accounts for around a quarter of total tourism activity. While international tourism is forecast to continue to enjoy significantly higher growth rates than domestic tourism, it will be well into the next century before it matches the level of activity of domestic tourism.

Economic importance

It is estimated by the Bureau of Tourism Research that expenditure by tourists directly contributed 6.6% to Gross Domestic Product in 1993–94, and accounted directly for some 536,000 jobs (6.9% of total employment).

In 1993–94, domestic tourism expenditure was an estimated \$32.5b. In addition, \$3.8b was spent domestically by Australians prior to departure on overseas visits. In 1995–96, international tourism to Australia generated export earnings of \$14.1b. This accounted for 12.8% of Australia's total export earnings and 63.1% of services exports.

While growth in tourism flows to Australia in the mid to late 1980s was at almost twice the international growth rate in tourism flows to all countries, 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 visitors, this share is never likely to be large. However, starting from a low base, there is still considerable potential for growth.

The number of international visitors to Australia increased at a rate of 25% per year from 1984 to 1988. However, 1989 saw a 7.5% decrease in arrivals to 2.1 million following the strong contributions of Expo 88 and the Bicentennial to the growth in 1988, but also reflecting 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, growing by double digit rates in most years to reach 3.7 million in 1995. Visitors from Asia have contributed increasingly to this upward trend.

The domestic travel market was relatively stagnant in the late 1980s and experienced an overall small downward trend in visitor nights during the early 1990s. Because of changes in survey methods, it is not possible to compare the latest figures, for 1994-95, with earlier figures.

Domestic tourism

In 1995, Australian residents, 15 years of age and over, spent a total of 251.8 million nights visiting other parts of the country (table 21.1). Each trip took an average of four nights, and each person in the population group made an average of four trips. Residents of the Australian Capital Territory were the most frequent travellers (average of six trips), while residents of the Northern Territory tended to stay away for the longest period (average of seven nights).

21.1 SUMMARY OF PERSON TRIPS AND NIGHTS AWAY(a) — 1995

State/Territory of origin	Estimated population as at 30 June 1995 '000	Person trips '000	Average trips per person	Total nights away '000	Nights away per person
New South Wales	4 818	19 680	4	81 370	4
Victoria	3 561	15 619	4	63 706	4
Queensland	2 557	11 437	4	50 631	4
South Australia	1 173	4 195	4	18 088	4
Western Australia	1 345	5 090	4	22 581	4
Tasmania	367	1 695	5	6 353	4
Northern Territory	126	509	4	3 310	7
Australian Capital Territory	238	1 453	6	5 721	4
Australia	14 186	59 679	4	251 760	4

(a) For persons aged 15 years and over.

Source: Domestic Tourism Monitor, Bureau of Tourism Research.

As table 21.2 shows, 'pleasure/holiday', as the main purpose of trip, accounted for the biggest proportion of visitor nights (42%), followed by 'visiting friends/relatives' (29%). 'Business trips' accounted for 14% of all visitor nights, while 'other' reasons accounted for 15%.

New South Wales was the most popular destination, accounting for nearly a third of all visitor nights. Queensland was the next most popular destination, attracting a quarter of all visitor nights, while Victoria accounted for nearly a fifth of all visitor nights.

21.2 VISITOR NIGHTS, Main Purpose of Trip — 1995

State/Territory	All business '000	Pleasure/holiday '000	Visiting friends/relatives '000	Other '000	Total '000
New South Wales	9 854	34 168	23 389	11 498	78 909
Victoria	5 829	20 597	14 374	7 341	48 140
Queensland	8 441	26 789	18 461	8 732	62 422
South Australia	2 069	6 125	5 050	2 726	15 970
Western Australia	5 237	9 301	7 282	3 899	25 719
Tasmania	974	3 640	1 768	1 391	7 772
Northern Territory	1 602	2 268	621	441	4 931
Australian Capital Territory	1 123	1 487	1 526	871	5 007
Other and not known	648	1 236	767	236	2 889
Australia	35 776	105 612	73 238	37 135	251 760

Source: Domestic Tourism Monitor, Bureau of Tourism Research.

As table 21.3 shows, in 1995 the most frequently used accommodation by domestic travellers was the house/flat of friends or relatives (43% of visitor nights), followed by hotels or motels with bathroom facilities in the guest room (18%) and caravan parks or camping grounds (14%). This

pattern, to varying degrees, was reflected in most States/Territories, although a greater proportion of visitors to Victoria, South Australia, Western Australia and the Northern Territory stayed in caravan parks or camping grounds.

21.3 VISITOR NIGHTS, Type of Accommodation Used — 1995

	NSW '000	Vic. '000	Qld '000	SA '000	WA 00	Tas. '000	NT '000	ACT '000	Other and not known '000	Aust. '000
All accommodation used										
Hotel/motel with facilities	14 438	7 410	13 280	2 406	3 711	2 127	1 077	1 349	67	45 865
Hotel/motel without facilities	1 296	637	1 085	227	701	165	108	130	28	4 376
Guest house/private hotel	1 638	1 026	883	234	524	208	49	76	0	4 636
Caravan/tent/cabin/camping	11 347	7 560	6 978	2 843	3 762	1 114	1 530	388	108	35 629
Rented house/flat	5 826	2 589	6 437	1 133	1 317	405	172	262	0	18 142
Friends'/relatives' house/flat	35 216	21 276	26 527	7 180	11 404	2 675	1 144	2 419	139	107 979
Own holiday house/flat	3 161	3 954	2 616	841	756	461	64	12	5	11 870
Farm	1 482	1 052	734	224	651	44	108	14	0	4 310
Boat/cabin cruiser	190	306	760	187	55	16	5	0	50	1 569
Hostel	832	435	664	60	248	141	39	83	0	2 501
Other/not stated	3 482	1 896	2 457	637	2 591	416	634	274	2 493	14 882
Total	78 909	48 140	62 422	15 970	25 719	7 772	4 931	5 007	2 889	251 760

Source: Domestic Tourism Monitor, Bureau of Tourism Research.

Intrastate visits account for the majority of total domestic tourism visitor nights (60%). It is a particularly important component of domestic tourism for Western Australia and Victoria, where around 70% of domestic visitor nights are accounted for by residents of the State (table 21.4).

In terms of numbers of visitor nights, net beneficiaries from domestic tourism (i.e. where inbound interstate visitor nights are greater than

outbound interstate visitor nights) are Queensland, Western Australia, Tasmania and the Northern Territory. While Queensland is the biggest relative net beneficiary, with nearly twice as many inbound nights as outbound nights, Victoria is the biggest relative net contributor, with twice as many outbound nights as inbound nights.

21.4 VISITOR NIGHTS, By State/Territory of Origin by States/Territories Visited — 1995

State of origin	State/Territory visited									Aust. '000
	NSW '000	Vic. '000	Qld '000	SA '000	WA '000	Tas. '000	NT '000	ACT '000	Not known and other '000	
NSW	50 986	6 535	13 403	2 058	2 288	1 077	1 097	2 881	1 047	81 370
Vic.	11 231	33 151	10 046	3 001	2 428	1 280	853	983	735	63 706
Qld	8 799	3 055	34 454	441	967	912	804	532	668	50 631
SA	2 319	2 493	1 613	9 271	771	422	603	384	211	18 088
WA	1 100	883	731	603	18 429	226	388	58	162	22 581
Tas.	657	789	726	76	202	3 754	5	115	28	6 353
NT	361	355	637	313	448	16	1 125	46	8	3 310
ACT	3 456	880	813	209	185	86	56	7	29	5 721
Aust.	78 909	48 140	62 422	15 970	25 719	7 772	4 931	5 007	2 889	251 760

Source: Domestic Tourism Monitor, Bureau of Tourism Research.

International inbound tourism

Characteristics

In 1995, the number of international visitors to Australia grew strongly, continuing the high growth experienced since the mid-1980s. The total number of visitors in 1995 was 3,725,800, representing an increase of 10.8% on 1994 and continuing the double digit growth rates of recent years (table 21.5).

21.5 INBOUND VISITORS

Year	Visitors no.	Change(a) %
1989	2 080 300	-7.5
1990	2 214 900	6.5
1991	2 370 400	7.0
1992	2 603 300	9.8
1993	2 996 200	15.1
1994	3 361 700	12.2
1995	3 725 800	10.8

(a) From previous year.

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

The range of countries which are significant sources of visitors is widening, with the result that the degree of dependence on the traditional source countries of Europe and North America is lessening. Particularly large increases are being experienced from some of the rapidly developing South-East Asian countries, although some of these increases are from a low base.

As table 21.6 shows, Japan continued to be Australia's most important market. It accounted for 21% of total visitors in 1995. This was followed by New Zealand (14%), the United Kingdom (9%) and the United States (8%).

The largest category of international visitors during 1995 was those arriving for 'holiday' purposes, accounting for just over 60% of all visitor arrivals. In addition to these visitors, another 19% arrived for the purpose of 'visiting friends/relatives'. About 12% arrived for

'business' purposes or to attend a 'convention/conference'. Arrivals for 'education' purposes are increasing and in 1995 accounted for nearly 3% of total visitor arrivals.

For most 'main purpose of trip' categories, New Zealand was the main source of visitors. The exceptions were 'holiday' visitors, where Japan provided nearly a third (31%) of all such visitors, and 'education' visitors, where Indonesia was the source of 11% of all such arrivals.

'Holiday' visitors were the largest category of visitors from almost all source countries/regions. The exceptions were visitors from the United Kingdom and the Middle East and North Africa, for whom 'visiting friends/relatives' was the largest purpose category.

The long distances most international visitors have to travel to Australia contributes to a relatively long stay in this country. In 1995, nearly 40% of visitors stayed for more than two weeks, while 20% stayed for more than a month (table 21.7). The relatively high number of visitors who are visiting friends or relatives (nearly three-quarters of whom stayed for more than two weeks) also contributed to the relatively long stay. Visitors arriving for 'education' purposes also tend to be long stayers, but their numbers are relatively small.

Visitor arrivals are seasonal and numbers fluctuate somewhat during the year. In 1995, the most arrivals were in December, with 11% of total arrivals, while the fewest arrivals were in May, with nearly 7% of total arrivals (table 21.8). However, seasonality is not as strong as for arrivals to many other destination countries.

Outside December and May, the proportions of total arrivals only ranged from 7% to 9%. A number of factors contribute to the relative lack of seasonality, primarily the attractive climate in many parts of the country throughout the whole year, and the wide diversity of source countries of visitors to Australia.

21.6 INBOUND VISITORS, By Country/Region of Residence and Main Purpose of Trip — 1995

Country/region of residence	Main purpose of trip							Visitors no.	Change on 1994 %
	Convention/conference '000	Business '000	Visiting friends/relatives '000	Holiday '000	Employment '000	Education '000	Other and not stated '000		
New Zealand	17.1	90.8	164.2	227.9	4.8	3.2	30.4	538.4	12.1
Other Oceania	4.1	8.9	22.2	43.9	0.8	7.1	21.9	108.8	2.8
Germany	1.4	8.5	19.5	88.6	0.4	1.7	4.2	124.2	1.2
United Kingdom	4.9	26.9	162.8	134.0	4.8	1.6	12.9	347.9	3.8
Other Europe	8.8	27.4	72.0	147.9	2.8	5.3	15.8	279.9	6.3
Indonesia	3.4	8.2	12.1	89.4	0.7	11.1	9.9	135.0	27.7
Malaysia	4.4	7.6	20.6	63.5	0.2	7.6	4.3	108.2	13.8
Singapore	3.7	16.5	21.3	146.5	0.3	7.4	6.6	202.4	7.9
Hong Kong	2.4	12.8	28.5	75.5	0.2	8.1	4.2	131.7	20.3
Japan	3.2	32.0	14.5	696.5	0.9	8.7	27.0	782.7	8.5
Korea	3.0	9.7	10.5	129.0	0.1	8.5	7.1	168.0	51.6
Taiwan	1.4	6.5	7.8	123.3	0.1	4.9	7.8	152.0	6.7
Other Asia	9.9	27.5	35.0	87.5	1.3	11.8	19.4	192.3	26.9
USA	16.5	63.0	57.3	141.9	3.0	7.8	15.4	304.9	5.2
Other America	3.1	7.7	24.8	33.9	0.9	1.8	4.7	77.0	7.1
Middle East and North Africa	0.8	2.3	11.5	10.4	0.1	0.4	3.2	28.7	20.1
Other Africa	1.5	4.7	15.0	17.2	0.2	0.7	3.0	42.2	-0.9
Not stated	0.0	0.1	0.5	0.6	0.0	0.1	0.3	1.6	-33.3
Total	89.7	361.0	700.1	2 257.5	21.7	97.8	198.0	3 725.8	10.8

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

21.7 INBOUND VISITORS, By Intended Length of Stay and Main Purpose of Trip — 1995

Intended length of stay	Main purpose of trip							Visitors no.	Proportion of total %
	Convention/conference '000	Business '000	Visiting friends/relatives '000	Holiday '000	Employment '000	Education '000	Other and not stated '000		
Under 1 week	30.4	164.0	67.2	802.3	2.1	3.4	75.3	1 144.7	30.7
1 week and under 2 weeks	40.4	106.1	123.8	814.3	1.6	7.1	65.0	1 158.2	31.1
2 weeks and under 1 month	15.6	50.2	211.6	368.0	1.2	7.0	22.0	675.6	18.1
1 month and under 2 months	2.6	18.7	159.5	151.9	1.9	6.1	12.0	352.7	9.5
2 months and under 3 months	0.3	6.8	51.1	39.0	1.3	6.9	4.9	110.2	3.0
3 months and under 6 months	0.3	9.0	57.1	44.0	3.2	17.5	7.5	138.7	3.7
6 months and under 12 months	0.1	6.1	30.0	37.9	10.4	49.8	11.4	145.7	3.9
Total	89.7	361.0	700.1	2 257.5	21.7	97.8	198.0	3 725.8	100.0

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

21.8 INBOUND VISITORS, By Month and Main Purpose of Trip — 1995

Month	Main purpose of trip							Visitors no.	Proportion of total %
	Convention/conference '000	Business '000	Visiting friends/relatives '000	Holiday '000	Employment '000	Education '000	Other and not stated '000		
January	3.1	21.1	54.8	189.2	2.4	12.4	20.8	303.8	8.2
February	8.6	29.1	55.0	185.8	1.6	20.4	18.6	319.1	8.6
March	7.6	33.6	56.3	194.0	1.9	4.2	16.0	313.5	8.4
April	5.6	26.8	62.8	175.4	1.9	6.8	14.8	294.2	7.9
May	6.8	29.9	38.1	150.6	1.7	3.8	13.9	244.8	6.6
June	6.6	25.3	48.1	157.3	1.9	5.8	16.5	261.4	7.0
July	9.5	33.7	53.4	193.7	1.9	19.6	17.9	329.7	8.8
August	7.9	40.4	44.8	190.7	1.7	4.6	14.9	304.9	8.2
September	9.5	28.8	52.6	154.7	1.8	5.5	15.7	268.6	7.2
October	12.1	33.7	57.3	191.7	1.9	7.6	16.2	320.7	8.6
November	9.5	36.3	63.8	212.6	1.7	3.6	15.5	342.9	9.2
December	3.1	22.1	113.2	261.8	1.5	3.5	17.0	422.3	11.3
Total	89.7	361.0	700.1	2 257.5	21.7	97.8	198.0	3 725.8	100.0

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

New South Wales is by far the most popular State for all categories of international visitors. In 1995, 37% of all nights spent by international visitors were spent in New South Wales. Queensland was the next most popular State,

accounting for 23% of all international visitor nights. Victoria accounted for 18% of international visitor nights, and Western Australia 10% of international visitor nights (table 21.9).

21.9 INBOUND VISITOR NIGHTS, By State/Territory and Main Purpose of Trip — 1995

State/Territory	Main purpose of trip				Total '000	Total %
	Holiday '000	Visiting friends/relatives '000	Business '000	All other reasons '000		
New South Wales	11 890	5 919	2 421	9 336	29 566	37.2
Victoria	3 870	4 515	1 249	4 632	14 267	18.0
Queensland	10 415	4 718	601	2 369	18 103	22.8
South Australia	1 216	842	178	594	2 829	3.6
Western Australia	3 019	2 210	576	2 360	8 165	10.3
Tasmania	616	684	14	366	1 679	2.1
Northern Territory	1 852	182	116	372	2 522	3.2
Australian Capital Territory	548	648	149	958	2 303	2.9
Not stated	2	43	0	0	45	0.1
Australia	33 428	19 761	5 303	20 988	79 479	100.0

Source: International Visitor Survey, Bureau of Tourism Research.

Expenditure

In 1995 international visitors to Australia each spent an average of \$1,936. Highest spenders were visitors from Indonesia who each spent an average of \$3,409. On average, visitors from Scandinavia, Canada, Hong Kong, Malaysia, Other Europe and Germany were high spenders. The lowest average expenditure, \$1,160 per visitor, was by visitors from New Zealand (table 21.10).

On average, food, drink and accommodation accounted for over a third of expenditure, while just under a third of expenditure was on shopping (table 21.11). High spenders on food, drink and accommodation tended to be from Europe and North America, while visitors from Asian countries tended to direct a high proportion of expenditure on shopping. Persons visiting for 'other' reasons (e.g. education,

21.10 AVERAGE VISITOR EXPENDITURE, By Country of Residence and Expenditure Item — 1995

Country of residence	Items of expenditure						Total \$
	Transport \$	Food, drink and accommodation \$	Shopping \$	Entertainment and gambling \$	Capital goods \$	Other \$	
New Zealand	136	457	377	58	50	81	1 160
Germany	663	1 131	486	98	30	213	2 578
United Kingdom	405	957	357	125	38	130	1 991
Scandinavia	720	1 324	512	157	70	179	2 881
Other Europe	576	1 111	445	112	102	268	2 612
Indonesia	254	1 024	880	260	188	750	3 409
Malaysia	178	684	565	133	121	1 016	2 696
Singapore	178	573	541	218	136	499	2 141
Hong Kong	300	723	549	95	462	608	2 737
Japan	133	261	888	48	26	55	1 410
Korea	130	457	840	53	39	491	2 009
Taiwan	108	451	804	63	53	458	1 938
Thailand	166	643	756	70	29	452	2 117
Other Asia	184	571	554	71	44	379	1 801
USA	461	1 060	371	93	33	234	2 251
Canada	584	1 271	370	164	59	303	2 752
Other countries	238	639	581	67	54	238	1 818
All countries	269	659	592	92	69	259	1 936

Source: International Visitor Survey, Bureau of Tourism Research.

employment, health) were the highest spenders on average, followed by business visitors. Relatively high expenditure on food, drink and accommodation contributed to an

overall high average expenditure by business visitors. Holiday visitors were the highest spenders on shopping (table 21.11).

21.11 AVERAGE VISITOR EXPENDITURE, By Main Purpose of Trip — 1995

Expenditure items	Main purpose of trip				Total \$
	Holiday \$	Visiting friends and relatives \$	Business \$	All other reasons \$	
Transport	267	193	303	367	269
Food, drink and accommodation	505	459	1 145	1 358	659
Shopping	660	486	353	634	592
Entertainment and gambling	88	81	70	153	92
Capital goods	32	114	122	144	69
Other	87	129	156	1 496	259
All items	1 631	1 462	2 147	4 152	1 936

Source: International Visitor Survey, Bureau of Tourism Research.

Inbound tour operators

Of the total 2.2 million overseas 'holiday' visitors who arrived in Australia during 1994–95, inbound tour operators handled 1.5 million (69%). These overseas visitors coming to Australia on package tours paid a total of \$1.2b to Australian inbound tour operators for the Australian content of their tour.

Passengers from Japan accounted for 46% of the total passengers involved and 54% of the total value of gross invoices (i.e. all amounts received

for ground content, e.g. coach transfers, accommodation, meals, cruises, etc. received in Australia). Passengers from Asia (excluding Japan) represented 31% of total passengers and accounted for 22% of the total value of gross invoices.

The Americas accounted for 8% of passengers and 8% of the total value of gross invoices, Europe (including the United Kingdom and Ireland) for 8% of passengers and 10% of gross

invoices, and New Zealand and the South Pacific for 2% of passengers and 1% of the total value of gross invoices.

At 30 June 1995, inbound tour operators employed 2,900 persons full time and 470 persons part time in Australia. In addition, they employed 250 persons full time overseas.

Australia's tourism marketing expenditure overseas

During 1994-95 Australian tourism-related organisations spent more than \$265m on marketing their products overseas. Of this total expenditure, 27% was directed towards the United Kingdom and Europe, 26% towards the Japanese market, 20% towards the United States and Canada, and 20% towards Asia (excluding Japan).

Of the total \$265m, the majority (71%) was independent expenditure, while 15% was spent in cooperation with the Australian Tourism Commission and 14% was in cooperation with other organisations.

Of the total tourism marketing expenditure overseas by Australian tourism-related organisations, 20% was by inbound tour operators, 14% by accommodation operators, 14% by State tourism authorities, and 4% by coach operators.

International outbound tourism

While the numbers of foreign visitors coming to Australia has grown rapidly in recent years, the number of Australian residents visiting overseas has also increased (table 21.12). However, the increase has been smaller, and since around the mid-1980s the numbers of inbound visitors have generally been higher than the numbers of outbound visitors. Consequently, tourism has been improving the net positive contribution of the travel item to Australia's balance on current account.

21.12 AUSTRALIANS TRAVELLING ABROAD

Year	no.	change %
1989	1 989 800	17.2
1990	2 169 900	9.1
1991	2 099 400	-3.2
1992	2 276 300	8.4
1993	2 267 100	-0.4
1994	2 354 300	3.8
1995	2 518 600	7.0

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

Australians travel abroad to visit a wide variety of main destinations. As table 21.13 shows, the most popular main destination is New Zealand, which was the main destination for 15% of Australian residents visiting overseas in 1995. This was followed by the United States, the main destination for over 12%, and the United Kingdom, the main destination for nearly 11% of Australian residents visiting abroad. In Asia, Indonesia was the most popular main destination country (9%), while other Australian visitors to Asia chose a wide variety of countries as their main destination.

Nearly a half (45%) of Australian residents visiting abroad in 1995 went for 'holiday' purposes, while a further 26% went to 'visit friends/relatives'. For all destination countries/regions, the largest category of Australian visitors was 'holiday', except in the Philippines and Other Asia where 'visiting friends/relatives' was the largest category. Other destinations which attracted a relatively high proportion of Australians 'visiting friends/relatives' were New Zealand, the United Kingdom and Other Europe.

Australians travelling for 'business' purposes accounted for 17% of Australian outbound travellers. Their main destinations were New Zealand, the United States, Other Asia and Hong Kong.

21.13 AUSTRALIANS TRAVELLING ABROAD, By Main Destination and Main Purpose of Trip — 1995

Country/region of residence	Main purpose of trip							Total '000	change on 1994 %
	Convention/conference '000	Business '000	Visiting friends/relatives '000	Holiday '000	Employment '000	Education '000	Other and not stated '000		
Fiji	2.7	7.3	10.2	49.9	1.3	0.8	2.4	74.6	3.0
New Zealand	13.6	75.4	125.1	132.0	6.4	4.1	14.8	371.4	14.7
Other Oceania	2.9	19.4	13.3	55.3	11.9	2.6	5.0	110.3	4.4
Italy	1.5	5.1	16.9	24.5	0.6	0.8	1.0	50.3	2.0
United Kingdom	6.9	28.2	87.5	126.1	5.8	3.3	7.6	265.4	10.5
Other Europe	8.7	28.4	85.3	87.9	4.3	4.8	8.4	227.9	9.0
Indonesia	6.1	27.4	12.1	163.9	5.8	2.3	4.6	222.2	8.8
Malaysia	2.8	21.7	22.7	34.1	3.4	0.6	3.3	88.6	3.5
Philippines	1.1	7.5	23.5	17.0	0.5	0.2	1.7	51.5	2.0
Singapore	4.6	27.6	15.7	38.2	4.9	1.3	2.7	95.0	3.8
Thailand	2.5	12.3	8.4	47.9	1.7	0.9	1.7	75.3	3.0
China	1.8	15.8	14.9	16.6	1.5	1.1	1.3	52.9	2.1
Hong Kong	4.5	41.8	36.7	59.6	7.4	2.1	4.8	156.9	6.2
Other Asia	4.6	45.8	74.2	51.3	6.6	5.4	8.6	196.6	7.8
USA	29.3	57.7	42.6	166.5	4.7	5.3	7.9	314.0	12.5
Other America	4.1	5.3	21.5	25.9	1.0	1.1	2.5	61.4	2.4
Mid. East and North Africa	0.8	4.3	21.7	21.0	2.5	0.9	2.9	54.0	2.1
Other Africa	1.9	6.5	12.1	16.1	1.1	0.5	1.6	39.9	1.6
Not stated	0.4	1.3	0.5	6.7	0.9	0.1	0.6	10.5	0.4
Total	100.8	438.8	644.7	1 140.4	72.2	38.2	83.5	2 518.6	100.0

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

The relatively long distances for Australian residents travelling to other countries are reflected in the relatively long periods of stay abroad. In 1995, only 10% stayed abroad less than a week, while nearly 40% stayed away for over a month (table 21.14). In addition to distances involved in getting to destination

countries, the high proportion of Australians 'visiting friends/relatives' also contributed to long periods of stay, as such travellers traditionally tend to stay in destination countries longer than other types of visitors. In 1995, nearly 60% of such visitors stayed away for over a month.

21.14 AUSTRALIANS TRAVELLING ABROAD, Intended Length of Stay and Main Purpose of Trip — 1995

Intended length of stay	Main purpose of trip							Total '000	Proportion of total %
	Convention/conference '000	Business '000	Visiting friends/relatives '000	Holiday '000	Employment '000	Education '000	Other and not stated '000		
Under 1 week	21.2	131.5	29.1	70.8	5.5	3.5	9.8	271.4	10.8
1 week and under 2 weeks	41.2	120.2	76.7	344.9	7.1	7.0	18.4	615.5	24.4
2 weeks and under 1 month	28.6	94.5	166.5	345.0	11.6	7.2	17.6	671.1	26.6
1 month and under 2 months	7.5	43.4	181.0	202.7	8.4	4.6	10.9	458.4	18.2
2 months and under 3 months	1.2	17.7	84.1	76.0	5.9	3.3	5.5	193.8	7.7
3 months and under 6 months	0.8	18.0	69.7	60.9	10.3	4.2	7.9	171.8	6.8
6 months and under 12 months	0.3	13.5	37.6	40.1	23.5	8.3	13.4	136.6	5.4
Total	100.8	438.8	644.7	1 140.4	72.2	38.2	83.5	2 518.6	100.0

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

While the numbers of Australian residents departing for visits abroad varies from month to month, there are not great seasonal fluctuations. Table 21.15 shows that the largest number of departures in 1995 was in December (11%),

followed by September (10%). In general, the Australian winter months were more popular than the summer months for departing to other countries.

21.15 AUSTRALIANS TRAVELLING ABROAD, By Month of Departure and Main Purpose of Trip — 1995

Month	Main purpose of trip							Total '000	Proportion of total %
	Convention/ conference '000	Business '000	Visiting friends/ relatives '000	Holiday '000	Employment '000	Education '000	Other and not stated '000		
January	4.7	29.3	40.8	73.4	7.4	3.9	6.6	166.1	6.6
February	5.6	35.0	35.5	62.7	5.2	2.4	5.6	151.9	6.0
March	9.5	39.4	46.1	85.4	4.4	2.3	7.4	194.6	7.7
April	9.1	37.2	54.7	98.0	5.2	2.9	7.5	214.6	8.5
May	11.7	39.0	50.8	87.7	4.3	1.7	6.6	201.7	8.0
June	9.0	38.4	61.0	105.1	4.5	3.7	7.6	229.4	9.1
July	8.1	35.5	55.4	114.5	9.6	3.1	7.5	233.6	9.3
August	8.7	34.4	43.0	88.5	12.8	3.4	6.7	197.5	7.8
September	11.7	41.0	52.1	131.3	4.7	6.3	7.4	254.6	10.1
October	9.3	43.0	40.0	89.7	5.0	1.7	5.3	194.0	7.7
November	8.9	41.3	57.8	77.3	4.9	3.9	7.1	201.1	8.0
December	4.5	25.5	107.4	126.9	4.3	2.9	8.0	279.5	11.1
Total	100.8	438.8	644.7	1 140.4	72.2	38.2	83.5	2 518.6	100.0

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

Tourist accommodation

As shown in table 21.16, at December 1995 there were 169,630 rooms available in Australia in hotels, motels and guest houses with facilities. This was an increase of nearly 2% over availability at December 1994. The number of holiday flats, units and houses available for short-term letting increased by 5% (to 39,249) over the same period. At December 1995, there were 27,070 beds available in 'visitor hostels' in Australia, an increase of 4% over December 1994. The capacity of caravan parks in Australia remained virtually unchanged over this period.

During 1995 the supply of hotel, motel and guest house accommodation in Australia grew more slowly than demand. While the number of guest rooms available increased by 2% in the year to 31 December 1995, the number of room nights occupied increased by 4%. The comparative rates for 1994 were 0.1% for rooms available and 6% for room nights occupied. While the supply of holiday flats, units and houses increased by 5% over the year ended 31 December 1995, demand in terms of unit nights occupied increased by 7%. For visitor hostels, the number of bed nights occupied over the same period increased by 9%, and in

caravan parks the number of site nights occupied rose marginally (0.5%).

In the year ended 31 December 1995, the average length of stay in licensed hotels with facilities was 2.3 days, for motels etc. 1.9 days, for visitor hostels it was 2.6 days but for holiday flats, units and houses it was 5.2 days.

New South Wales is the State with the most commercial tourist accommodation available. At December 1995, just over a third (31% or 57,407 guest rooms) of Australia's tourist accommodation capacity in hotels, motels and guest houses with facilities was in New South Wales. Nearly a half (45% or 25,686 guest rooms) of the New South Wales capacity was concentrated in the Sydney Statistical Division. Queensland had 25% (42,161 guest rooms), and Victoria had 18% (29,798 guest rooms) of Australia's accommodation capacity.

21.16 TOURIST ACCOMMODATION — 1995(a)

	Unit	March quarter	June quarter	September quarter	December quarter
Licensed hotels with facilities(b)					
Establishments	no.	1 127	1 133	1 127	1 134
Guest rooms	no.	67 120	67 487	67 854	68 329
Bed spaces	no.	178 791	179 449	179 650	181 171
Room occupancy rates	%	64.2	61.0	64.5	66.2
Bed occupancy rates	%	40.2	37.0	40.4	41.3
Gross takings from accommodation	\$'000	434 817	421 806	470 960	491 670
Motels, etc.(b)					
Establishments	no.	3 689	3 706	3 712	3 722
Guest rooms	no.	100 256	100 265	101 058	101 301
Bed spaces	no.	303 641	303 927	306 655	307 458
Room occupancy rates	%	54.1	52.8	56.8	55.2
Bed occupancy rates	%	33.0	31.0	34.0	33.0
Gross takings from accommodation	\$'000	341 838	334 322	380 667	372 109
Total hotels and motels etc.(b)					
Establishments	no.	4 816	4 839	4 839	4 856
Guest rooms	no.	167 376	167 752	168 912	169 630
Bed spaces	no.	482 432	483 376	486 305	488 629
Room occupancy rates	%	58.1	56.1	59.9	59.7
Bed occupancy rates	%	37.5	33.3	36.4	36.0
Gross takings from accommodation	\$'000	776 655	756 128	851 627	863 780
Caravan parks(c)					
Establishments	no.	2 706	2 701	2 710	2 708
Powered sites	no.	203 987	203 401	203 995	203 922
Unpowered sites	no.	67 656	67 939	67 965	67 451
Cabins, flats etc.	no.	16 336	16 458	16 817	17 091
Total capacity	no.	287 979	287 798	288 777	288 464
Site occupancy rates(d)	%	45.4	43.2	44.1	42.9
Gross takings from accommodation	\$'000	121 550	106 447	115 014	119 268
Holiday flats, units and houses(b)					
Flats, units etc.					
One bedroom	no.	8 303	8 394	8 398	8 440
Multiple bedroom	no.	29 706	29 774	29 991	30 809
Total flats, units etc.	no.	38 009	38 168	38 389	39 249
Bed spaces	no.	165 704	166 262	167 188	171 118
Unit occupancy rates	%	56.3	45.0	56.3	54.1
Gross takings from accommodation	\$'000	133 221	97 999	127 963	134 843
Visitor hostels(e)					
Establishments	no.	427	432	438	441
Bed spaces	no.	25 660	26 049	26 397	27 070
Bed occupancy rates	%	47.1	44.4	47.1	47.0
Gross takings from accommodation	\$'000	13 819	13 351	14 888	15 203

(a) A tourist accommodation establishment is defined as an establishment which predominantly provides short-term accommodation (i.e., 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).

Estimates of the origin of guests staying in hotels, motels and guest houses in Australia during 1994–95 indicate that overseas visitors accounted for 23% of room nights occupied in these establishments. This compares with 37% for interstate visitors and 40% for intrastate visitors (based on table 21.17).

Queensland and the Northern Territory had the highest proportions of overseas visitor nights to total visitor nights, each having 29%. Next highest were New South Wales with 25% and Western Australia with 20%, followed by Victoria (17%), the Australian Capital Territory (13%), South Australia (12%) and Tasmania (9%). The strong popularity of New South Wales and

Queensland is reflected in the fact that 70% of overseas guest nights were spent in these States.

The Australian Capital Territory, Tasmania and the Northern Territory were the most

dependent on interstate visitors, who accounted for a half or more of those guest nights. At the other end of the scale, in New South Wales and Queensland, interstate visitors accounted for only a third of total guest nights.

21.17 GUEST NIGHTS — 1994–95

State/Territory	Origin of guests			Total '000
	Intrastate '000	Interstate '000	Overseas '000	
New South Wales	5 076	3 949	2 963	11 988
Victoria	2 511	2 158	986	5 655
Queensland	3 616	3 045	2 715	9 385
South Australia	845	902	233	1 980
Western Australia	1 425	1 128	643	3 196
Tasmania	326	638	89	1 053
Northern Territory	241	576	332	1 149
Australian Capital Territory	36	706	110	852
Total	14 076	13 111	8 071	35 258

Source: *Experimental Estimates of the Origin of Guests, Hotels, Motels and Guest Houses, Australia, 1994–95* (9501.0).

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