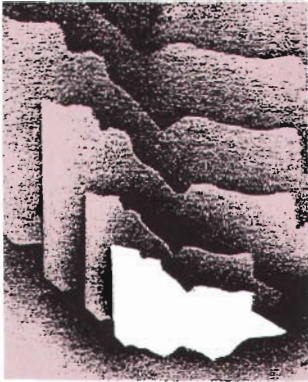


Tourism in Victoria



INTRODUCTION

There is a growing trend for international travellers to include Australia on their holiday destination list. The Bureau of Tourism Research (BTR) has forecast that the number of short-term visitor arrivals to Australia will rise to 3,332,000 in 1995 and 4,847,000 by the year 2000.

Victoria, being a most desirable tourist destination in terms of its variety of attractions, its excellent climate, its compact size and its central location within Australia, is well placed to increase its market share of the Australian tourism industry.

It is estimated that Tourism contributed around 7 per cent of GDP in Victoria in 1987-88. With current employment estimates for the industry of 130,000 people, it has been calculated that approximately 7 per cent of the Victorian workforce is reliant to some extent on tourist expenditure.

The Bureau of Industry Economics estimated tourism expenditure in Victoria at \$4.2 billion in 1988-89, approximately 19 per cent of the estimated total tourism expenditure in Australia.

The statistics contained in this article were produced by the Australian Bureau of Statistics (ABS) and the Bureau of Tourism Research (BTR).

The BTR was established in late 1987, in accordance with the recommendations of the Australian Government Inquiry into Tourism. It is a co-operative venture, jointly funded by the Commonwealth and State/Territory governments.

At the State level, the Victorian Tourism Commission (VTC) was established under the *Victorian Tourism Act 1982*, to market Victoria as a tourist destination to Victorians, other Australians and overseas visitors.

The VTC has recently launched tourism campaigns for the Gippsland Lakes and Murray regions of Victoria, and has promoted Melbourne as the 'City of Gold' in a publicity campaign in South East Asia. The VTC has also assisted with enhancing Melbourne's reputation as a leading convention city, with the number of conventions held in Melbourne in 1989-90 increasing by 30 over the previous year. The World Congress Centre opened in April 1990.

OVERSEAS VISITORS

Arrivals of overseas visitors for short-term visits

The number of short-term visitor arrivals to Australia in 1989 was 2,080,300, a decrease of 8 per cent from the record figure in 1988 (2,249,300) but 17 per cent higher than in 1987. The major source countries were New Zealand (22 per cent), Japan (17 per cent), the United Kingdom and Ireland (14 per cent) and the United States of America (13 per cent).

Short-term visitor arrivals to Australia more than doubled between 1984 (1,015,100) and 1989. In 1989, the majority of visitors came for the purpose of "holiday or accompanying business traveller" (54 per cent) and "visiting relatives" (22 per cent).

By way of comparison, the number of Australian residents departing for short-term visits overseas in 1989 totalled 1,989,800.

SHORT-TERM MOVEMENT
Overseas visitors arriving in Australia

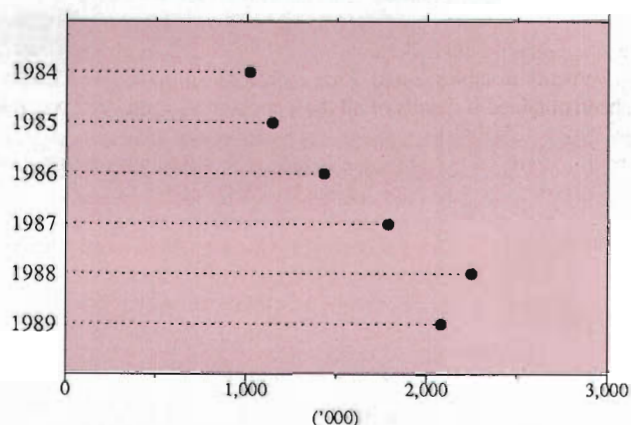


TABLE 1 SHORT-TERM MOVEMENT (a) - OVERSEAS VISITORS ARRIVING BY INTENDED LENGTH OF STAY AND MAIN PURPOSE OF JOURNEY, AUSTRALIA, 1989

Intended length of stay	In transit	Purpose of Journey					Other and not stated	Total
		Visiting relatives	Holiday, accompanying business traveller	Business	Employment	Attending convention		
Under 1 week	78,400	31,400	268,900	93,500	1,900	6,400	19,200	499,800
1 week and under								
2 weeks	100	54,000	341,000	68,700	1,700	11,200	17,400	494,000
2 weeks and under								
3 weeks	-	71,100	170,100	30,600	800	4,800	9,200	286,600
3 weeks and under								
1 month	-	60,400	87,100	7,400	500	1,300	5,300	161,900
1 month and under								
2 months	-	117,100	120,100	14,200	2,000	1,200	11,000	265,600
2 months and under								
3 months	-	44,500	39,400	5,200	2,000	300	7,500	98,900
3 months and under								
6 months	-	42,200	43,900	5,700	5,000	100	13,800	110,700
6 months and under								
12 months	100	39,200	55,700	5,600	16,000	200	45,800	162,700
Not stated	-	-	-	-	-	-	-	100
Total	78,600	459,900	1,126,400	230,800	30,000	25,400	129,200	2,080,300

(a) Figures show movement by sea and air combined. Figures for movement by air are largely based on a sample and are subject to sampling error.

Source: *Overseas Arrivals and Departures, Australia* (ABS Cat. No. 3404.0).

Short-term overseas visitors to Victoria

Movement of travellers whose intended or actual period of stay is less than twelve months is classified by the ABS as short-term, with the exception of travel by those who on arrival hold migrant visas.

Persons arriving in Australia are required to complete prescribed questionnaires in the form of Incoming Passenger cards. These cards provide information to the Department of Immigration, Local Government and Ethnic Affairs and also serve as the source of statistics of overseas arrivals.

Overseas arrival statistics are derived from a combination of full enumeration and sampling. Fully enumerated strata cover all permanent movements and all movements with a duration of stay of more than one year. All movements with a duration of stay of less than one year are sampled and statistics relating to these movements in tables 2 and 3 are therefore estimates, which may differ from statistics which would have been obtained if details of all these movements had been processed.

Tables 2 and 3 provide details of the estimated number of short-term overseas visitors who nominated Victoria as their intended address whilst in Australia. They do not reflect the total number of overseas visitors who visited Victoria whilst in Australia.

In 1989-90, 338,800 short-term visitor arrivals from overseas nominated Victoria as their intended address in Australia. Of these visitors, 35 per cent came from Asia, 29 per cent from Europe, 21 per cent from Oceania, 14 per cent from America and 1 per cent from Africa.

It is interesting to note that 55 per cent of our short-term visitors from overseas came from just four countries, namely New Zealand (19 per cent), the United Kingdom (13 per cent), Japan (12 per cent), and the United States (11 per cent).

The Bureau of Tourism Research conducts an International Visitors Survey. This survey is administered to international visitors at their point of departure and is the only official statistical information on the travel behaviour of international visitors *within* Australia. Tables 4 and 5 indicate that there were 686,500 international short term visitors to Victoria in 1989. This figure represented approximately 33 per cent of all international visitors to Australia. Over recent years, Victoria (together with Australia) has experienced considerable growth rates in most of its major markets. In the five years to 1989, visitors from Victoria's major markets doubled, with exceptionally high numbers in 1988.

TABLE 2 SHORT-TERM VISITOR ARRIVALS (a) BY MAIN PURPOSE OF JOURNEY AND WHERE STATE OF INTENDED STAY IS VICTORIA, 1989-90

<i>Main purpose of journey</i>	<i>Sept. qtr</i>	<i>Dec. qtr</i>	<i>Mar. qtr</i>	<i>June qtr</i>
In transit	1,000	800	700	900
Visiting relatives	19,100	35,800	24,800	18,900
Holiday, accompanying				
business traveller	29,100	44,900	41,800	31,900
Attending convention	800	1,200	700	600
Business	12,400	13,700	15,100	12,200
Employment	1,300	1,500	1,800	1,400
Other and not stated	5,200	5,700	9,500	6,300
Total	68,800	103,500	94,300	72,100

(a) Figures for short-term movement are largely based on a sample and are subject to sampling error.

Source: *Overseas Arrivals and Departures, Australia* (ABS Cat. No. 3402.0).

TABLE 3 SHORT-TERM VISITOR ARRIVALS BY COUNTRY OF RESIDENCE, REASON FOR STAY, AND WHERE STATE OF INTENDED STAY IS VICTORIA, 1989-90

Country of Residence	Reason for journey				Total
	Visiting relatives	Holiday, accompanying business traveller	Business, employment, attending convention	Other and not stated	
Africa					
South Africa	1,000	300	200	100	1,500
Other Africa	1,000	400	200	100	1,700
Total Africa	2,000	700	400	200	3,200
North America					
Canada	2,900	3,300	1,100	500	7,700
United States	7,400	16,900	11,700	2,700	38,700
Total	10,300	20,100	12,800	3,200	46,400
Central America	100	100	-	-	300
South America	700	400	100	100	1,400
Total America	11,200	20,700	13,000	3,400	48,300
Asia					
Western Asia					
(Middle East)(a)	2,500	1,500	500	200	4,700
South Central Asia (b)	1,900	1,300	1,100	1,100	5,300
South East Asia					
Indonesia	1,200	2,200	400	900	4,700
Malaysia	4,600	3,500	800	2,800	11,700
Singapore	2,200	4,200	1,900	700	9,000
Other	1,900	2,800	1,200	1,200	7,100
Total	9,900	12,700	4,300	5,600	32,500
East Asia					
China	600	1,400	1,200	4,400	7,600
Hong Kong	3,200	8,700	2,000	2,000	15,900
Japan	1,500	33,300	6,100	1,300	42,200
Taiwan	300	6,200	800	500	7,800
Other	200	300	500	400	1,400
Total	5,800	49,900	10,600	8,600	74,900
Total Asia	20,100	65,400	16,400	15,500	117,400
Europe					
United Kingdom	21,300	15,400	6,600	2,100	45,400
Germany	3,000	7,700	2,100	700	13,500
Greece	2,200	600	100	200	3,100
Italy	2,400	2,000	800	300	5,500
Netherlands	2,500	1,500	600	200	4,800
Sweden	400	2,100	900	300	3,700
Switzerland	700	2,100	400	100	3,400
Other	8,200	6,100	3,400	1,200	18,800
Total Europe	40,700	37,500	14,900	5,100	98,200

TABLE 3 SHORT-TERM VISITOR ARRIVALS BY COUNTRY OF RESIDENCE, REASON FOR STAY, AND STATE OF INTENDED STAY, VICTORIA, 1989-90 - continued

Country of Residence	Reason for journey				Total
	Visiting relatives	Holiday, accompanying business traveller	Business, employment, attending convention	Other and not stated	
Oceania					
New Zealand	22,200	21,000	17,100	4,100	64,400
Other	2,300	2,400	800	1,700	7,100
Total Oceania	24,500	23,400	17,900	5,800	71,500
Grand Total	98,500	147,700	62,500	30,100	338,800

(a) Includes Cyprus, Israel, Lebanon, Saudi Arabia, Turkey and other Western Asia.

(b) Includes India, Nepal, Pakistan, Sri Lanka and other South-Central Asia.

Note: The Statistics in this table have been rounded to the nearest 100. The sums of the components may, due to rounding, not add exactly to totals.

Source: Unpublished data (ABS Table No. 31)

TABLE 4 ALL SHORT-TERM OVERSEAS VISITORS TO VICTORIA BY PURPOSE OF VISIT AND COUNTRY OF ORIGIN, 1989

	Holiday	Visiting friends and relatives	Business	Other	Total
Japan	106,900	900	8,200	13,400	129,300
Europe (excl. UK & Ire.)	65,100	23,000	12,100	10,300	110,500
USA	57,000	9,300	26,200	17,000	109,500
Asia (excl. Japan)	46,500	18,300	14,000	24,000	102,700
UK and Ireland	42,100	39,900	12,800	7,900	102,600
New Zealand	29,800	29,000	21,800	9,200	89,900
Canada	11,100	4,700	1,700	3,600	21,100
Other	9,700	6,900	3,800	400	20,800
Total	368,300	131,900	100,600	85,700	686,500

Source: *International Visitors Survey*, Bureau of Tourism Research.

Note: Totals may not add due to rounding.

TABLE 5 INTERNATIONAL VISITORS TO VICTORIA 1987 TO 1989

	1987	1988	1989	Percentage change between 1987 and 1989
Japan	103,500	179,700	129,300	25
Europe (excl. UK & Ire.)	89,400	115,300	110,500	24
U.S.A.	132,900	145,000	109,500	-18
Asia (excl. Japan)	102,100	126,300	102,700	1
U.K. and Ireland	73,000	90,200	102,600	41
New Zealand	99,200	90,800	89,900	-9
Canada	22,100	29,300	21,100	-5
Other	20,300	55,600	20,800	2
Total	642,800	832,500	686,500	7

Source: *International Visitors Survey*, Bureau of Tourism Research.

Note: Totals may not add due to rounding.

The International Visitors Survey, conducted by the Bureau of Tourism Research, indicates that in 1989 international visitors spent an average of 14.4 nights in Victoria. People on business stayed an average of 7.3 nights, those on holiday stayed an average of 8.9 nights, while those visiting friends and relatives spent an average of 24.4 nights in Victoria.

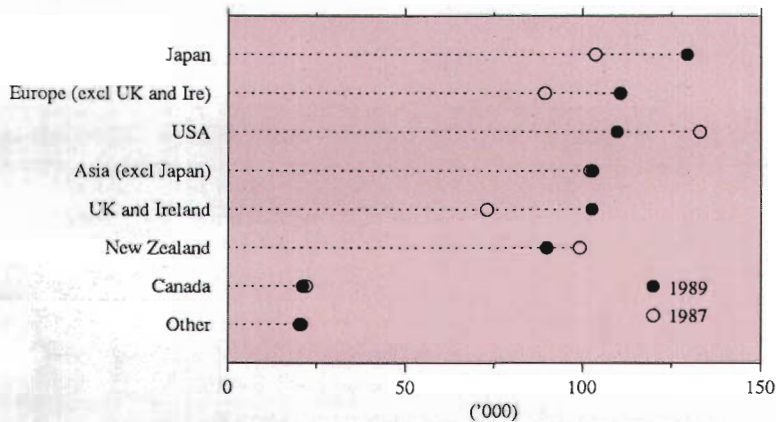
TABLE 6 INTERNATIONAL VISITORS: AVERAGE LENGTH OF STAY IN VICTORIA (NIGHTS), 1989

Asia (excl. Japan)	20.7	U.S.A.	13.7
U.K. & Ireland	19.7	New Zealand	11.1
Canada	17.4	Japan	3.8
Europe (excl. UK and Ire.)	16.7	Average	14.4

Note: Apart from Japan and Europe (excluding UK and Ireland), which remained constant, international visitors have been steadily extending their length of stay in Victoria.

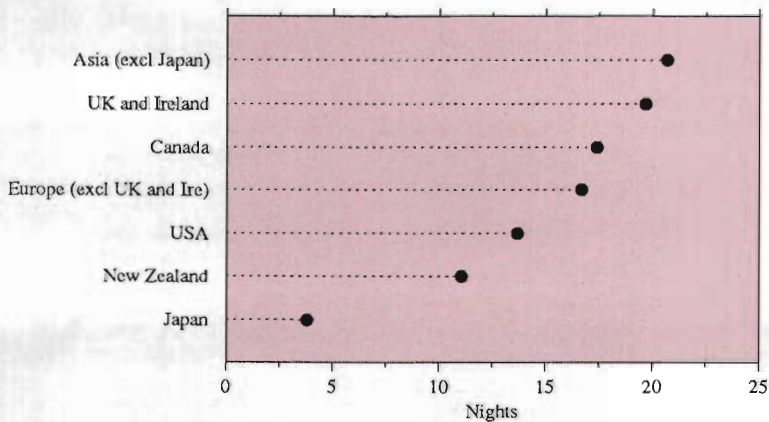
Source: *International Visitors Survey*, Bureau of Tourism Research

INTERNATIONAL VISITORS TO VICTORIA, 1987 AND 1989



Source: *International Visitors Survey*, Bureau of Tourism Research

AVERAGE LENGTH OF STAY IN VICTORIA, INTERNATIONAL VISITORS, 1989



Source: *International Visitors Survey*, Bureau of Tourism Research

TABLE 7 ESTIMATED EXPENDITURE BY INTERNATIONAL VISITORS TO VICTORIA, 1986 AND 1989

Origin	Average expenditure per visitor			Total visitor expenditure		
	1986	1989 (a)	Growth	1986	1989 (a)	Growth
	\$	\$	Per cent	\$m	\$m	Per cent
International -						
USA	485	1,316	171	48	141	193
Asia (excl. Japan)	1,196	1,176	-2	95	119	25
Japan	296	524	77	19	65	234
Canada	528	1,105	109	10	24	147
New Zealand	585	814	39	47	74	56
UK & Ireland	792	940	19	54	95	77
Europe (excl. UK and Ireland)	860	986	15	61	107	77
Other Countries	812	812	-	18	30	63
All Visitors	699	938	34	352	660	88

(a) Based on average expenditure per day in Australia and length of stay in Victoria.

Source: *International Visitors Survey*, Bureau of Tourism Research.

INTERSTATE VISITORS

The majority of interstate visitors to Victoria come from New South Wales and South Australia. In 1988-89, visitors from these States accounted for 76 per cent of all interstate visitors to Victoria. This illustrates that proximity plays an important role when choosing holiday and travel destinations.

TABLE 8 INTERSTATE VISITS TO VICTORIA 1986-87 TO 1988-89 ('000)

	1986-87	Per cent	1987-88	Per cent	1988-89	Per cent
NSW	1,228	47	1,258	47	1,188	47
Qld	308	12	374	14	275	11
SA	693	27	656	25	747	29
WA	150	6	122	5	128	5
Tas.	76	3	86	3	105	4
NT	10	-	22	1	10	-
ACT	141	5	130	5	95	4
Total	2,606	100	2,648	100	2,548	100

Source: *Domestic Tourism Monitor*, Bureau of Tourism Research

INTRASTATE VISITS

Household surveys conducted on behalf of the BTR indicate that Victorians made over 8 million trips within Victoria during 1988-89. Melburnians made 4.5 million trips while residents of country Victoria made 3.4 million trips. To qualify as a trip residents must have stayed away one or more nights and have been a minimum of 40 kilometres away from home.

TABLE 9 INTRASTATE VISITS WITHIN VICTORIA 1986-87 TO 1988-89 ('000)

	1986-87	1987-88	1988-89
Melbourne	4,646	5,489	4,562
Victoria (country)	3,515	3,374	3,450
Total	8,161	8,863	8,012

Source: *Domestic Tourism Monitor*, Bureau of Tourism Research.

VICTORIANS ON HOLIDAY

For the 12 months to May 1989 1,915,300 Victorians aged 15 years or over had a holiday of 4 consecutive nights or more away from their usual residence. People in the 15-24 year age group were the most likely to have taken a holiday, with 63.2 per cent having done some compared to the Victorian average for all persons of 56.6 per cent.

The proportions of men and women who took holidays were very similar, with the 57.3 per cent figure for women only slightly higher than the 55.9 per cent recorded by males. Of the adults who resided in the Melbourne Statistical Division, 56.2 per cent had spent 4 or more nights away from home, compared to 57.5 per cent who lived in the rest of Victoria.

TABLE 10 PERSONS AGED 15 YEARS OR OVER : WHETHER THEY HAD A HOLIDAY AWAY FROM HOME OF FOUR NIGHTS OR MORE DURING THE 12 MONTH PERIOD TO MAY 1989 (a)

	<i>Males</i>	<i>Females</i>	<i>Persons aged 15-24 years</i>	<i>Persons living in Melbourne Statistical Division</i>	<i>Persons living in the rest of Victoria</i>
Had holiday during 12 month period	931,700	983,600	455,900	1,354,800	560,400
No holiday during 12 month period	735,100	734,100	265,800	1,054,100	415,000

(a) Figures rounded to nearest hundred.

Source: *Victorian Social Survey*.

ACCOMMODATION

Tourists use hotels and motels more than any other type of accommodation facility. However when converted to visitor nights, (ie) type of facility used by length of stay, the home of a friend or relative becomes the dominant form of accommodation used.

TABLE 11 TYPE OF ACCOMMODATION USED (VISITOR NIGHTS) IN VICTORIA

	<i>International visitors to Australia, 1989 (a)</i>		<i>Interstate visitors 1988-89</i>		<i>Intrastate visitors 1988-89</i>	
	'000	Per cent	'000	Per cent	'000	Per cent
Hotels/Motels	1,862	18.9	2,329	20.1	2,968	12.2
Hostels	936	9.5	138	1.2	244	1.0
Guest house	59	0.6	163	1.4	318	1.3
Rented house/flat	1,301	13.2	321	2.8	1,259	5.2
Home of friend or relative	4,592	46.6	6,431	55.5	9,472	38.8
Rented farm	39	0.4	243	2.1	389	1.6
Caravan/cabin/tent/ campervan	414	4.2	1,089	9.4	5,438	22.3
Own holiday home	-	-	120	1.0	2,120	8.7
Other	650	6.6	753	6.5	2,177	8.9
Total	9,854	100.0	11,587	100.0	24,384	100.0

(a) Separate data for Victoria is not yet available. It is assumed that these Australian proportions are indicative of the Victorian experience.

Source: *International Visitors Survey and Domestic Tourism Monitor*, Bureau of Tourism Research.

HOSPITALITY SECTOR STATISTICS

The ABS conducted a Service Industries Survey in respect of the 1986-87 financial year. Some comparative statistics for those industries included in the "Hospitality Sector" - the Cafes and Restaurants, Licensed Clubs, Hotels and Bars and Accommodation industries - are provided in Tables 12 and 13.

Growth in the Victorian Hospitality Sector (5 per cent) was less than the national average (8 per cent) during the period 1979-80 to 1986-87. There was a considerable decline in the Licensed Clubs industry (13 per cent) and negligible growth in the Hotels and Bars industry. The accommodation industry grew reasonably strongly (29 per cent).

Of the \$624.5m turnover in the Victorian Cafes and Restaurants industry, \$488.1m comprised takings from meals, \$50.2m came from ready-to-eat take-away food and \$56.2m came from sales of beer, wine and spirits. The balance was made up of takings from accommodation, other retail sales and other revenue.

In 1986-87 the average Cafes and Restaurants industry turnover per capita was about \$150 in Victoria. This compared with about \$260 in the Australian Capital Territory and \$188 in New South Wales.

The Australian Hotels and Bars industry had an estimated employment of about 82,600 persons, of whom 28 per cent (23,000) worked in the industry in Victoria. Based on turnover, the New South Wales industry was only slightly larger than that in Victoria and Queensland. However the Licensed Clubs industry, with which the Hotels and Bars industry is in competition, is very much larger in New South Wales than in all other States combined.

TABLE 12 HOSPITALITY SECTOR : CHANGE IN TURNOVER BETWEEN 1979-80 AND 1986-87, AT AVERAGE 1986-87 PRICES, BY STATE (a)

	<i>Cafes and restaurants industry (ASIC 9231)</i>	<i>Licensed clubs industry (ASIC 9241-3)</i>	<i>Hotels and bars industry (ASIC 9232)</i>	<i>Accommodation (ASIC 9233)</i>	<i>Total hospitality sector</i>
	Per cent				
New South Wales	25.2	-10.7	-15.2	52.3	1.5
Victoria	8.3	-13.3	0.8	28.8	5.1
Queensland	26.3	-1.2	17.8	68.4	24.9
South Australia	18.0	47.7	1.0	35.1	11.5
Western Australia	10.2	3.7	1.6	25.3	7.4
Tasmania	-2.1	-8.7	0.6	-11.1	-3.2
Northern Territory	31.0	46.4	58.8	133.0	71.8
Australian Capital Territory	154.7	55.0	-59.8	35.1	27.4
Australia	20.0	-6.9	-0.4	45.4	8.1

(a) In deriving the statistics in this table, the 1979-80 turnover data have been adjusted to a 1986-87 prices basis, so the change indicated is the extent of "real" change in turnover between 1979-80 and 1986-87.

TABLE 13 HOSPITALITY SECTOR : TURNOVER BY STATE, 1986-87

	<i>Cafes and restaurants industry (ASIC 9231)</i>	<i>Licensed clubs industry (ASIC 9241-3)</i>	<i>Hotels and bars industry (ASIC 9232)</i>	<i>Accommodation (ASIC 9233)</i>	<i>Total hospitality sector</i>
			Sm		
New South Wales	1,059.3	1,863.8	1,207.0	873.7	5,003.8
Victoria	624.5	219.0	1,171.9	422.6	2,438.0
Queensland	351.8	229.6	1,176.2	494.8	2,252.4
South Australia	178.6	85.1	497.3	120.9	881.9
Western Australia	226.4	109.6	469.3	171.6	976.9
Tasmania	47.2	31.6	179.3	62.4	320.5
Northern Territory	26.2	28.1	83.2	75.5	213.0
Australian Capital Territory	69.8	69.3	23.4	60.0	222.5
Australia	2,583.9	2,636.1	4,807.6	2,281.5	12,309.0

TOURIST ACCOMMODATION SURVEY

A quarterly accommodation survey is undertaken by the ABS to provide information about the utilisation of available tourist accommodation. These surveys commenced from the September quarter 1975. Data collected include the available capacity, room occupancy, bed occupancy, and takings from accommodation. Currently, the types of accommodation surveyed are hotels, motels, and guest houses with facilities; caravan parks; and holiday flats, units, and houses.

Accommodation establishments in the snow districts of Victoria, which are located within the North Eastern and Goulburn Statistical Divisions, usually experience high occupancy during the September quarter. Occupancy rates in the Northern Mallee Statistical Division tend to be highest in the cooler months of the June and September quarters. For the remainder of the State, high occupancy occurs during the Christmas school holidays, particularly in the statistical divisions with coastal resorts.

TABLE 14 HOTELS, MOTELS AND GUEST HOUSES WITH FACILITIES: NUMBER OF ESTABLISHMENTS (a), NUMBER OF GUEST ROOMS (a), OCCUPANCY RATES (b) AND TAKINGS (b); BY STATISTICAL DIVISION, VICTORIA

		1984-85	1985-86	1986-87	1987-88	1988-89	1989-90
MELBOURNE STATISTICAL DIVISION							
Establishments	No.	178	179	185	188	212	222
Guest rooms	No.	8,566	8,784	9,582	9,661	10,739	11,576
Room occupancy rate	Per cent	64.2	65.8	62.8	65.3	66.3	61.5
Takings from accommodation	\$'000	107,243	123,783	148,567	190,535	230,528	252,224
BARWON STATISTICAL DIVISION							
Establishments	No.	50	52	57	64	70	70
Guest rooms	No.	993	1,025	1,078	1,148	1,315	1,318
Room occupancy rate	Per cent	45.6	45.5	45.0	45.7	44.5	48.0
Takings from accommodation	\$'000	5,829	6,311	7,025	8,416	10,390	12,637
SOUTH WESTERN STATISTICAL DIVISION							
Establishments	No.	50	52	57	61	71	73
Guest rooms	No.	1,038	1,019	1,057	1,145	1,353	1,403
Room occupancy rate	Per cent	48.0	53.8	47.6	47.0	47.1	45.1
Takings from accommodation	\$'000	5,743	6,923	6,877	7,761	9,690	11,175

TABLE 14 HOTELS, MOTELS AND GUEST HOUSES WITH FACILITIES: NUMBER OF ESTABLISHMENTS (a), NUMBER OF GUEST ROOMS (a), OCCUPANCY RATES (b) AND TAKINGS (b); BY STATISTICAL DIVISION, VICTORIA - *continued*

		1984-85	1985-86	1986-87	1987-88	1988-89	1989-90
CENTRAL HIGHLANDS STATISTICAL DIVISION							
Establishments	No.	38	41	44	44	53	54
Guest rooms	No.	740	839	896	894	1,028	1,056
Room occupancy rate	Per cent	60.8	60.8	55.5	51.5	53.3	53.4
Takings from accommodation	\$'000	5,784	6,671	7,353	7,696	9,658	11,330
WIMMERA STATISTICAL DIVISION							
Establishments	No.	37	37	40	44	46	48
Guest rooms	No.	609	608	687	747	784	825
Room occupancy rate	Per cent	49.3	47.5	47.1	45.6	45.2	45.4
Takings from accommodation	\$'000	3,567	3,777	4,599	5,406	5,865	6,235
NORTHERN MALLEE STATISTICAL DIVISION							
Establishments	No.	50	50	51	52	63	63
Guest rooms	No.	1,367	1,368	1,370	1,402	1,561	1,556
Room occupancy rate	Per cent	56.8	59.0	54.9	51.6	48.1	52.2
Takings from accommodation	\$'000	9,691	10,676	10,581	11,082	12,101	14,172
LODDON - CAMPASPE STATISTICAL DIVISION							
Establishments	No.	61	59	62	68	89	90
Guest rooms	No.	985	969	1,013	1,147	1,548	1,546
Room occupancy rate	Per cent	55.0	55.8	53.0	49.9	46.5	48.9
Takings from accommodation	\$'000	6,664	7,190	7,333	8,810	12,001	14,306
GOULBURN STATISTICAL DIVISION							
Establishments	No.	69	71	77	77	112	116
Guest rooms	No.	1,197	1,194	1,342	1,352	2,033	2,155
Room occupancy rate	Per cent	42.2	42.8	43.3	41.1	39.2	40.3
Takings from accommodation	\$'000	6,462	7,178	8,096	8,774	12,446	16,501
NORTH EASTERN STATISTICAL DIVISION							
Establishments	No.	75	76	77	77	98	100
Guest rooms	No.	1,424	1,428	1,423	1,479	1,931	1,954
Room occupancy rate	Per cent	40.1	43.1	46.2	45.8	44.4	45.3
Takings from accommodation	\$'000	8,370	9,852	10,714	10,542	13,335	16,929
EAST GIPPSLAND STATISTICAL DIVISION							
Establishments	No.	51	54	59	60	64	63
Guest rooms	No.	1,011	1,065	1,110	1,117	1,187	1,158
Room occupancy rate	Per cent	50.3	49.3	47.1	47.3	48.6	49.2
Takings from accommodation	\$'000	6,256	6,763	7,144	8,010	9,115	9,879
CENTRAL GIPPSLAND STATISTICAL DIVISION							
Establishments	No.	38	39	41	40	55	57
Guest rooms	No.	717	737	774	727	1,030	1,053
Room occupancy rate	Per cent	41.3	39.3	36.3	34.5	37.4	39.3
Takings from accommodation	\$'000	3,240	3,182	3,345	3,350	5,510	6,525

TABLE 14 HOTELS, MOTELS AND GUEST HOUSES WITH FACILITIES: NUMBER OF ESTABLISHMENTS (a), NUMBER OF GUEST ROOMS (a), OCCUPANCY RATES (b) AND TAKINGS (b); BY STATISTICAL DIVISION, VICTORIA - continued

		1984-85	1985-86	1986-87	1987-88	1988-89	1989-90
EAST CENTRAL STATISTICAL DIVISION							
Establishments	No.	30	30	32	30	22	22
Guest rooms	No.	583	609	606	555	416	438
Room occupancy rate	Per cent	39.3	38.0	37.2	41.4	46.2	41.1
Takings from accommodation	\$'000	3,203	3,213	3,487	4,062	3,990	3,468
TOTAL VICTORIA							
Establishments	No.	727	740	782	805	955	978
Guest rooms	No.	19,230	19,645	20,938	21,374	24,925	26,038
Room occupancy rate	Per cent	55.5	56.5	54.5	54.9	54.6	53.0
Takings from accommodation	\$'000	172,049	195,522	225,120	274,447	334,629	375,381

(a) Number of establishments and number of guest rooms as at 30 June of each year.

(b) Room occupancy rates and takings from accommodation represent the average and total respectively, for each twelve month period.

BUILDING ACTIVITY

The following statistics relate to building activity related to tourism. The figures include construction of new buildings and alterations and additions to existing buildings. A complete enumeration is done of all non-residential building jobs with an approval value of \$30,000 or more.

TABLE 15 SUMMARY OF BUILDING ACTIVITY - HOTELS ETC (a) VICTORIA

	<i>Value (\$m)</i>		<i>Total</i>
	<i>Melbourne Statistical Division</i>	<i>Rest of Victoria</i>	
Commenced			
1987-88	47.7	46.3	94.0
1988-89	315.1	34.2	349.3
1989-90	60.2	52.2	112.4
Under Construction at End of Period			
1987-88	169.6	48.8	218.4
1988-89	324.1	56.7	380.8
1989-90	315.9	35.5	351.4
Completed			
1987-88	33.7	45.7	79.4
1988-89	184.9	56.6	241.5
1989-90	92.9	71.9	164.8
Value of Work done During Period			
1987-88	69.5	55.2	124.7
1988-89	166.1	78.3	244.4
1989-90	168.1	50.5	218.6
Value of Work Yet To Be Done			
1987-88	79.4	26.6	106.0
1988-89	252.7	13.0	265.7
1989-90	169.3	15.2	184.5

(a) Hotels, etc. includes motels, hostels, boarding houses, guest houses and holiday apartment building.

VICTORIAN TOURIST ATTRACTIONS

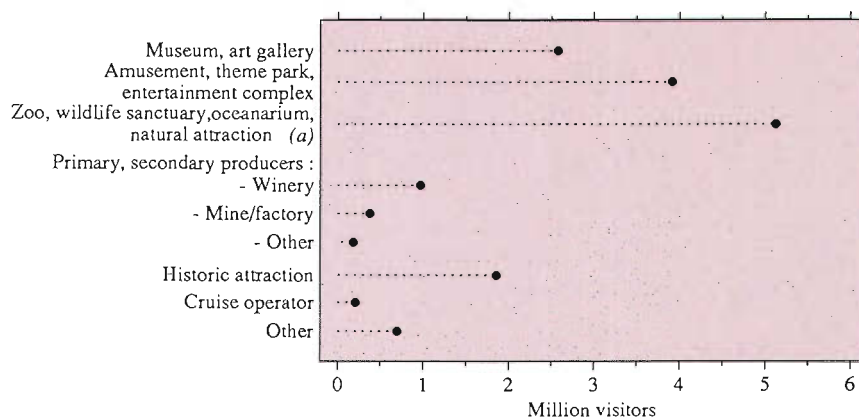
The following tables present statistics from the Tourist Attractions Survey conducted by the ABS in respect of 1986-87. This survey was part of the Selected Services Industries Collection.

The major findings of the survey were as follows:

- 345 Victorian attractions were included in the survey, of which 214 (62 per cent) charged admission fees or fares. They employed almost 3,300 staff, 82 per cent of whom worked at attractions which charged admission fees or fares.
- The attractions surveyed generated almost 16 million visits in 1986-87 (excluding visitors to National Parks). Most of these visitors were to attractions which charged admission fees or fares - such attractions received almost \$30 million in admission charges or fees in 1986-87.
- Almost half (45 per cent) of the staff employed in Victorian Tourist Attractions worked on a part-time basis, and most of these were casual staff.
- Voluntary workers provide a sizeable part, and in some cases all, the workforce for many tourist attractions. While there are no statistics available on the extent of the voluntary workforce, for the Victorian attractions surveyed, 47 per cent (100) of those which charged admission fees and 28 per cent (37) of those which did not, relied to some extent on the use of voluntary workers.
- Over \$23 million in capital expenditure was spent on Victorian Tourist Attractions surveyed in 1986-87.
- For the aggregate of all Victorian Tourist Attractions surveyed, the peak visitor month was January, followed by April, with July, February and August the months with the lowest number of visitors. The seasonality of visits to the different categories of attractions varied somewhat from one to another.
- Of the 345 attractions surveyed, 23 per cent were opened after 1980 and 60 per cent were opened since 1970.
- \$39 million (or 34 per cent) of the gross income of the attractions surveyed came from government sources, including the amounts required for funding of government operated attractions.

The chart below shows the number of visitors in 1986-87 to the attractions in Victoria which were included in the survey, by type of attraction.

TOURIST ATTRACTIONS, NUMBER OF VISITORS BY TYPE OF ATTRACTION, VICTORIA, 1986-87



(a) Excludes visitors to National Parks.

TABLE 16 TOURIST ATTRACTIONS: ATTRACTIONS FOR WHICH ADMISSION FEE CHARGED AND NOT CHARGED,
VICTORIA, 1986-87

Type of attraction	Number of attractions surveyed	Total visitors (a)	Employment at end June	Expenses		Total income	Capital Expenditure		
				Wages and salaries	Other		Gross	Disposals	Net
	No.	'000	No.	'000	'000	'000	'000	'000	'000
Attractions for which admission fee charged									
Museum, art gallery	67	2,417	600	11,760	12,296	25,886	6,972	7	6,965
Amusement, theme park entertainment complex	26	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
Zoo, wildlife sanctuary, oceanarium, natural attraction	39	2,369	520	8,480	5,876	15,406	2,814	65	2,749
Primary, secondary producers - Winery	-	-	-	-	-	-	-	-	-
Mine, factory, other	19	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
Historic attraction	43	1,500	227	2,692	2,689	7,392	1,320	-	1,320
Cruise operator	9	302	57	828	1,373	2,131	n.p.	n.p.	n.p.
Other	11	279	49	393	386	850	106	-	106
Total	214	11,087	2,683	40,429	50,518	95,867	19,923	618	19,305
Attractions for which admission fee not charged									
Museum, art gallery	19	162	38	434	515	1,002	208	-	208
Amusement, theme park Entertainment complex	1	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
Zoo, wildlife sanctuary, oceanarium, natural attraction	43	2,755	280	4,336	1,308	6,913	1,256	-	1,256
Primary, secondary producers - Winery	31	966	162	1,429	4,795	7,716	911	18	893
Mine, factory, other	14	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
Historic attraction	12	355	19	190	40	233	17	-	17
Cruise operator	-	-	-	-	-	-	-	-	-
Other	11	419	64	649	1,314	2,014	223	-	223
Total	131	4,806	582	7,087	8,253	18,738	3,142	18	3,124

(a) Excludes visitors to national parks.

TABLE 17 TOURIST ATTRACTIONS : CAPITAL EXPENDITURE AND DISPOSALS, VICTORIA, 1986-87
(^{'000})

Type of attraction	Gross expenditure			Net expenditure
	Land, buildings other structures	Vehicles, plant, machinery, equipment	Disposals	
Museum, art gallery	6,169	1,010	7	7,172
Amusement, theme park entertainment complex	1,618	7,256	96	8,779
Zoo, wildlife sanctuary, oceanarium, natural attraction	3,362	708	65	4,005
Primary, secondary producers -				
Winery	754	157	18	893
Mine, factory	n.p.	n.p.	n.p.	n.p.
Other	45	7	1	50
Historic attraction	900	437	-	1,337
Cruise operator	n.p.	n.p.	n.p.	n.p.
Other	36	294	-	329
Total	12,990	10,074	635	22,429
Of which -				
New assets	10,089	6,040	-	16,129
Land and secondhand assets	2,901	4,034	635	6,300

TABLE 18 TOURIST ATTRACTIONS : TOTAL EMPLOYMENT, VICTORIA, END JUNE 1987
(number)

Type of attraction	Number of attractions surveyed(a)	Partners/ proprietors	Permanent employees	Casual employees	Full-time employment	Part-time employment	Male employment	Female employment	Total employment
Museum, art gallery	50	22	515	101	476	162	351	287	638
Amusement, theme park Entertainment complex	25	9	562	597	464	704	643	525	1,168
Zoo, wildlife sanctuary, oceanarium, natural attraction	76	31	551	218	573	227	545	255	800
Primary, secondary producers -									
Winery	27	15	56	91	82	80	72	90	162
Mine, factory	10	11	24	10	23	22	19	26	45
Other	16	25	3	8	20	16	16	20	36
Historic attraction	36	11	113	122	99	147	128	118	246
Cruise operator	8	5	27	25	26	31	29	28	57
Other	18	16	53	44	43	70	64	49	113
Total	266	145	1,904	1,216	1,806	1,459	1,867	1,398	3,265

(a) Includes only those attractions which were run by proprietors or employed staff. Many attractions are operated solely by voluntary workers and are therefore not included in this table. Attractions which did not employ staff at end June 1987, e.g. due to seasonal closedowns, are also excluded from this table.

TABLE 19 TOURIST ATTRACTIONS : DETAILS OF OPERATIONS BY TYPE OF ORGANISATION (a), VICTORIA, 1986-87

Type of organisation	Number of attractions surveyed	Employment at end June	Total visitors (b)	Income				Expenses				Net capital expenditure	
				Admissions and fares	Concession fees	Government sources	Other income	Total	Wages and salaries	Advertising	Other expenses		Total
	No.	No.	'000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000
Federal Government Authority	5	3	71	23	-	92	101	216	86	6	90	181	17
State Government Authority	64	1,783	8,434	14,478	1,497	33,616	22,210	71,799	33,102	561	34,462	68,125	13,543
Local Government Authority	32	260	1,600	1,855	85	2,228	1,939	6,108	3,105	278	2,422	5,805	808
Other (c)	244	1,219	5,789	13,498	585	2,841	19,558	36,483	11,222	1,661	19,292	32,176	8,062
Total	345	3,265	15,893	29,854	2,166	38,776	43,809	114,605	47,515	2,506	56,265	106,287	22,429

(a) The classification applies to the organisation which *manages* the attraction, not to the organisation which *owns* the attraction.

(b) Excludes visitors to national parks.

(c) Includes private sector companies and attractions operated by sole proprietors, partnerships and trusts, voluntary and non-profit associations, etc.

TABLE 20 TOURIST ATTRACTIONS : DETAILS OF OPERATIONS BY VISITOR NUMBERS SIZE RANGES, VICTORIA, 1986-87

1986-87 Annual visitor numbers size ranges	Number of attractions surveyed	Employment at end June	Total visitors (a)	Income				Expenses				Net capital expenditure	
				Admissions and fares	Concession fees	Government sources	Other income	Total	Wages and salaries	Advertising	Other expenses		Total
'000	No.	No.	'000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000
Up to 1	48	23	22	22	-	158	80	259	35	10	123	168	37
>1-10	99	237	439	816	19	359	2,327	3,521	977	166	2,300	3,443	4,697
>10-20	61	163	842	1,389	14	1,027	1,832	4,262	1,546	154	2,433	4,134	908
>20-50	64	311	1,858	3,104	63	2,698	5,821	11,687	4,091	518	6,223	10,833	970
>50-1000	33	364	2,023	4,498	233	2,451	3,823	11,006	4,733	444	4,179	9,356	1,120
>100-500	36	1,140	5,840	10,941	586	13,914	13,772	39,214	16,400	912	16,301	33,614	4,826
Over 500	4	1,027	4,869	9,085	1,251	18,169	16,153	44,657	19,732	302	23,706	44,739	9,870
Total	345	3,265	15,893	29,854	2,166	38,776	43,809	114,605	47,515	2,506	56,265	106,287	22,429

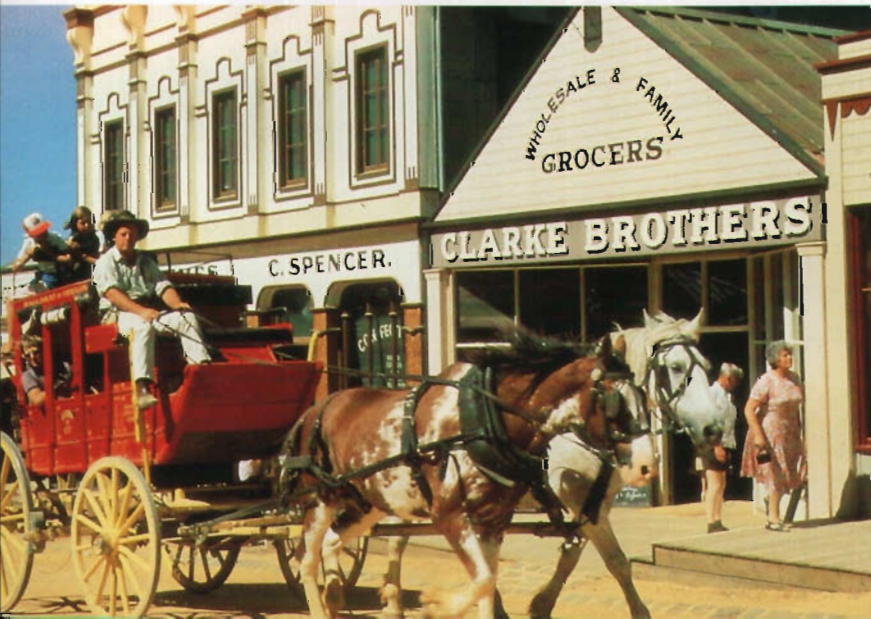
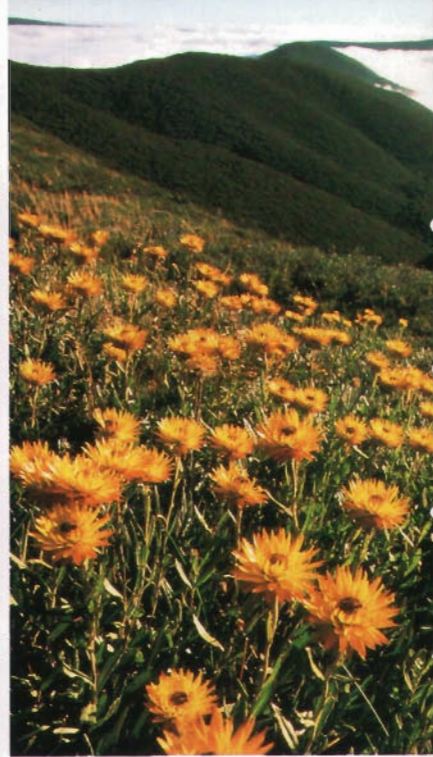
(a) Excludes visitors to national parks.



Forest in south-east Victoria. (*Victorian Tourism Commission*)

The Victorian Arts Centre by night. (*Melbourne Tourism Authority*)







Clockwise from right-
Paynesville, in the centre of the
Gippsland Lakes system

An outdoor fruit and vegetable stall,
Melbourne

View from the lookout at the Mt Buffalo
Chalet
(Victorian Tourism Commission)

Australian Motorcycle Grand Prix event
at Phillip Island

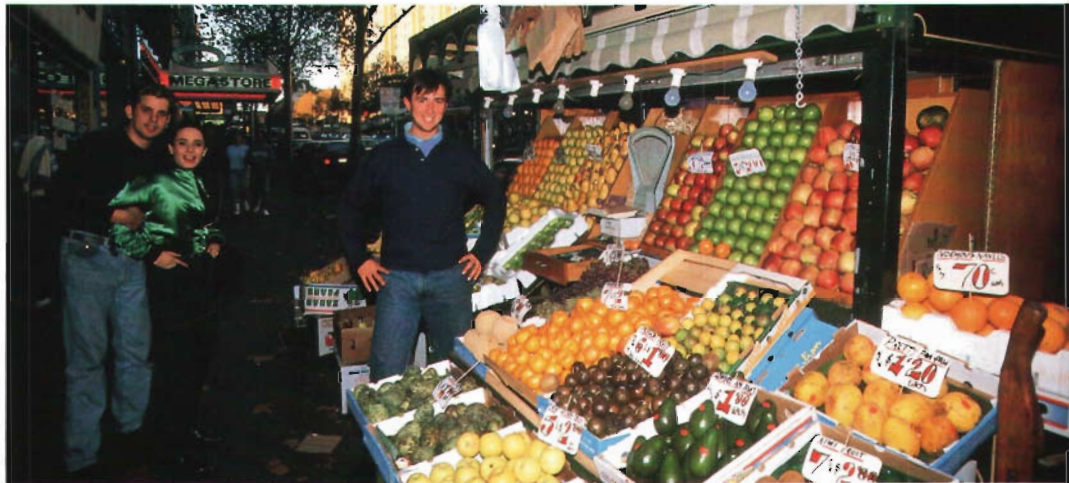
Sovereign Hill, an historical gold mining
township at Ballarat

P.S. Canberra on the Murray River at
Echuca
(Melbourne Tourism Authority)

A tranquil scene on the Yarra River

Everlasting flowers in bloom in the High
Country
(Victorian Tourism Commission)

Centre: The Fairy Penguins Reserve at
Phillip Island
(Melbourne Tourism Authority)





VICTORIA'S NATIONAL PARKS

Top - Shining Gum - Errinundra National Park

Right - Wilsons Promontory National Park

Below - Victoria Gap - Grampians National Park

(Conservation and Environment)

