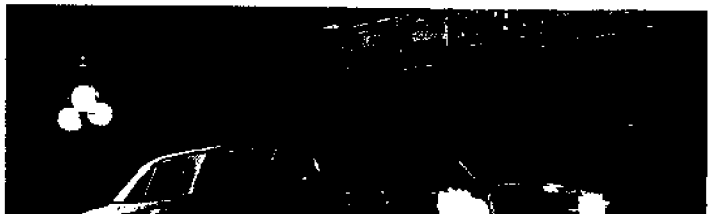
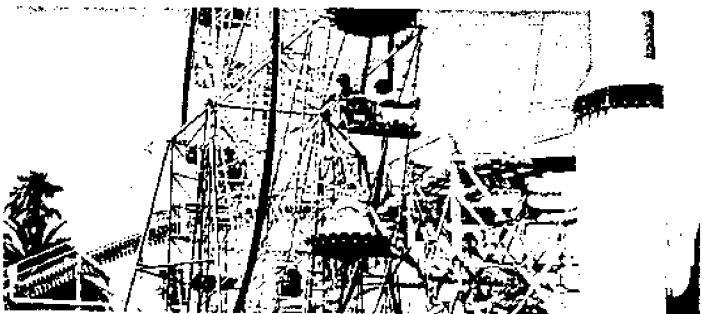
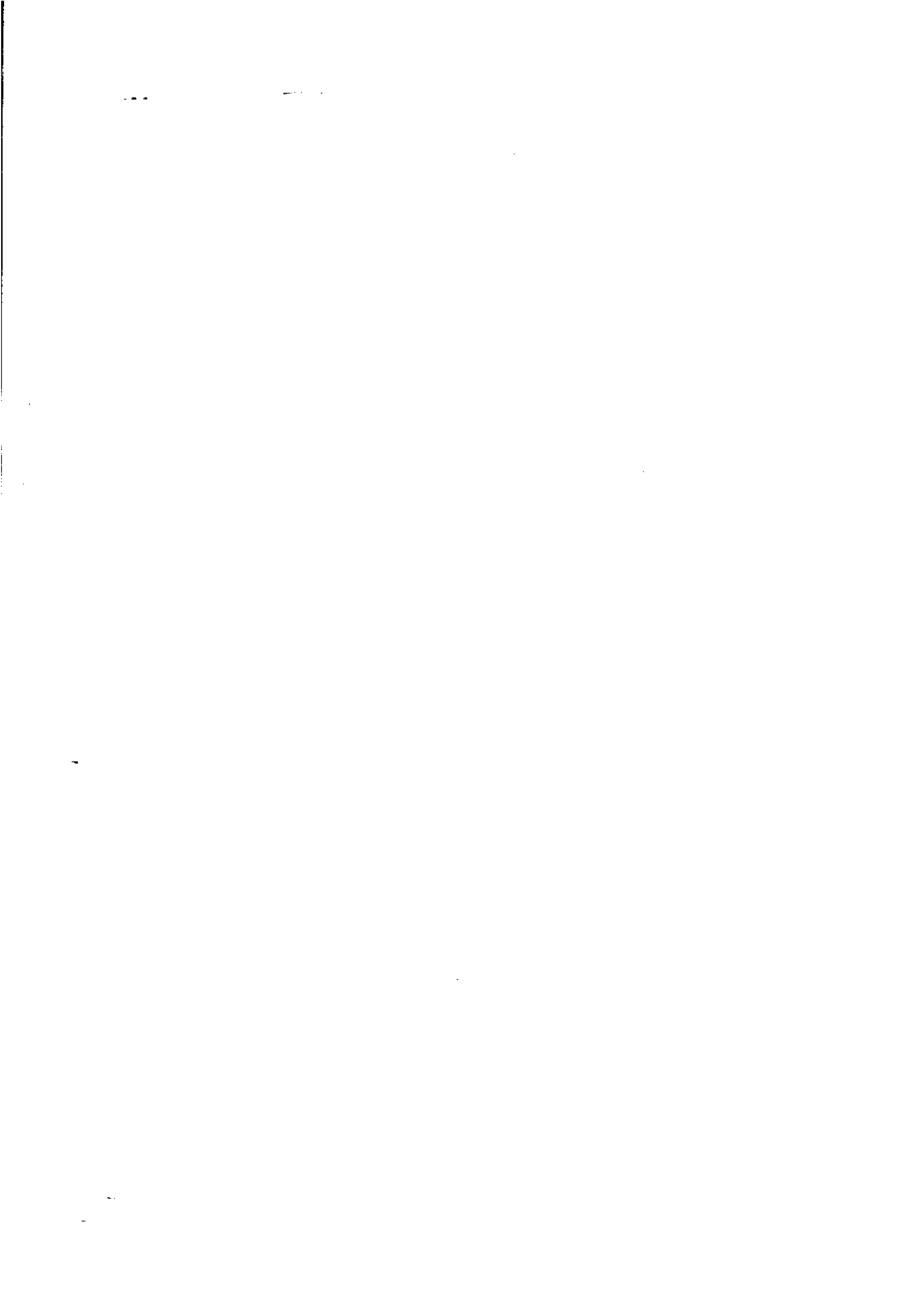




# **MOTOR VEHICLE HIRE INDUSTRY AUSTRALIA 1991 - 92**





EMBARGOED UNTIL 11:30 A.M. 19 OCTOBER 1994

**MOTOR VEHICLE HIRE**  
**AUSTRALIA**  
**1991-92**

**Ian Castles**  
*Australian Statistician*

**Acknowledgement for Photos on Cover:**

Atlas Hire Cars  
Melbourne Tourist Commission  
TAB-Gaming Marketing  
Victorian Tourism Commission  
Windsor Hotel

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**INQUIRIES** . for further information about statistics in this publication and the availability of related unpublished statistics, contact Dennis Robson, on Melbourne (03) 615 7634.  
                  . for information about other statistics and services please refer to the back page of this publication.

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## INTRODUCTION

In respect of the 1991-92 financial year, the ABS conducted a series of surveys on tourism-related industries. These industries included motor vehicle hire, hospitality, including accommodation, cafes and restaurants, licensed clubs, pub, bars and taverns, casinos and theme parks.

Information in this publication was collected in a census of businesses classified to class 7741, Motor Vehicle Hiring, of the 1993 edition of the Australian and New Zealand Standard Industrial Classification (see paragraphs 2-6 of the Technical Notes), apart from fleet management businesses.

In addition to this publication data from two additional surveys will be released in the following publications:

- . *Hospitality Industries, Australia, 1991-92 (8674.0);*
- . *Amusement and Theme Parks, Australia, 1991-92 (8675.0). Now available.*

These publications contain only a small portion of the information available from the surveys. More detailed information which would assist government agencies, industry associations, and individual businesses is available from the ABS on request. This includes in-depth statistical analysis in formats tailored to meet the needs of individual clients.

For the 1992-93 reference year the ABS is collecting information on a range of business services (legal, accounting, business management, advertising, architecture, computing, real estate, market research, surveying, consultant engineering and computer services). For the 1993-94 reference year the ABS is surveying the film and video production and distribution industries, motion picture exhibition and television and radio services industries.

The ABS is committed to providing more information on the priority service industries sector of the economy. However, the breadth of activities encompassed in the sector poses the problem of selecting the industries to include. To this end the ABS welcomes comments and suggestions from users recommending industries and data items for inclusion in future surveys. These comments should be addressed to: The Director, Service Industry Survey, PO Box 10, Belconnen, ACT, 2616.

**IAN CASTLES**  
Australian Statistician

**Australian Bureau of Statistics**  
**Belconnen ACT 2616**  
**October 1994**





## SECTION 1 MOTOR VEHICLE HIRE INDUSTRY: AN OVERVIEW

**TABLE 1.1 SUMMARY OF OPERATIONS FOR THE MOTOR VEHICLE HIRE INDUSTRY, AUSTRALIA, 1986-87 AND 1991-92**

<i>Item</i>	<i>Unit</i>	<i>1986-87</i>	<i>1991-92</i>	<i>Percentage change</i>
<b>Businesses</b>				
Businesses at end June	No.	217	222	2.3
<b>Employment</b>				
Employment at end June	No.	3,071	3,016	-1.8
<b>Vehicles</b>				
Vehicles in rental fleet at the end of June	No.	22,132	23,304	5.3
<b>Income from sales of goods and services</b>				
(Total operating income)	\$m	408.2	458.1	12.2
<i>Less</i>				
Cost of sales/services	\$m	328.6	284.8	-13.3
<b>Trading profit</b>	\$m	79.6	173.3	117.7
<i>Plus</i>				
Interest income	\$m	n.a.	3.5	..
Other income (a)	\$m	n.a.	8.7	..
<i>Less</i>				
Labour costs	\$m	56.2	68.0	21.0
Depreciation	\$m	25.0	54.8	119.2
Other expenses (excl. interest)	\$m	n.a.	21.3	..
<b>Earnings before interest and tax</b>	\$m	n.a.	41.3	..
<i>Less</i>				
Interest expenses	\$m	26.8	48.4	80.6
<b>Operating profit before tax</b>	\$m	n.a.	-7.1	..
<b>Industry gross product</b>	\$m	n.a.	173.6	..
<b>Operating profit margin</b>	%	n.a.	-1.5	..

(a) Other income includes income from franchises, dividends, rent, sales of assets, foreign exchange and 'other' non-operating income.

### Size of industry

The motor vehicle hire industry is a relatively small industry consisting of 222 businesses and employing about 3,000 people. In terms of contribution to Gross Domestic Product it represents less than 0.1 per cent.

### Significance of large businesses

The motor vehicle hire industry was dominated by four very large businesses. These 2 per cent of businesses accounted for 51 per cent of employment and 47 per cent of vehicles.

In terms of operating profit/loss, the motor vehicle hire industry overall incurred a loss (-\$7.1m) during 1991-92. The four largest businesses, incurred a loss of almost \$17m.

### Employment

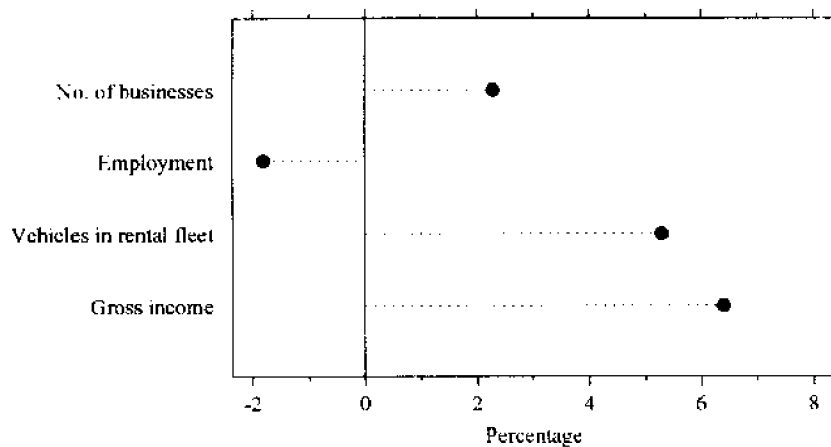
Between June 1987 and June 1992, the number of persons employed dropped by 2 per cent to 3,016 in spite of a 2 per cent increase in the number of businesses over the same period.

**Income**

During 1991-92, total gross income increased by 12 per cent compared with 1986-87.

Compared with 1986-87, the motor vehicle hire industry derived a much greater proportion of its income from a smaller range of income items. The contribution to total operating income of takings from car and truck rental and takings from long-term operating leases increased from 78 to 96 per cent. Takings from the sales of motor vehicles dropped dramatically.

**CHART 1.1 MAJOR VARIABLES, PERCENTAGE CHANGE BETWEEN 1986-87 AND 1991-92**

**Number of rental vehicles**

Between June 1987 and June 1992, the number of vehicles owned, being purchased or leased by the motor vehicle hire industry increased by 5 per cent to 23,304.

## Business profits and losses

During 1991-92, only 59 per cent of businesses in the motor vehicle hire industry reported operating profits before tax. Over one-third of businesses reported losses. Whilst most losses were in the \$5,000 to \$20,000 bracket, 2 per cent of businesses incurred losses greater than \$300,000.

A higher proportion of businesses in the motor vehicle hire industry suffered losses than did other non-farm businesses operating during 1991-92. Around 26 per cent of all non-farm businesses reported operating losses before tax.

**TABLE 1.2 DISTRIBUTION OF BUSINESSES BY RANGE OF OPERATING PROFIT/LOSS (a), AUSTRALIA, 1991-92**

	<i>Operating profit/loss before tax</i>	<i>Total number of businesses</i>	<i>Per cent</i>
Businesses reporting profit	Greater than \$500,000	7	3.1
	\$100,000 to \$499,999	24	10.6
	\$50,000 to \$99,999	25	11.1
	\$20,000 to \$49,999	37	16.4
	\$5,000 to \$19,999	32	14.2
	\$1,000 to \$4,999	9	4.0
<b>Total</b>		<b>134</b>	<b>59.3</b>
<b>Businesses breaking even</b>		<b>12</b>	<b>5.3</b>
Businesses reporting losses	\$1,000 to \$4,999	12	5.3
	\$5,000 to \$19,999	32	14.2
	\$20,000 to \$49,999	12	5.3
	\$50,000 to \$99,999	11	4.9
	\$100,000 to \$299,999	9	4.0
	Greater than \$300,000	4	1.8
<b>Total</b>		<b>80</b>	<b>35.4</b>

(a) This table includes businesses which ceased operation during the year. Business counts in other tables include only those businesses operating at the end of June 1992.

### More information?

Industry performance ratios for the motor vehicle hire industry, can be made available on request. These ratios include the liquidity ratio, interest coverage, return on assets and many more.

## SECTION 2 A STATE PERSPECTIVE

Only 11 of the 222 businesses operating at the end of June 1992 in the motor vehicle hire industry operated in more than one State or Territory. However, these 11 multi-State businesses accounted for more than half of the activity of the industry:

- . 52 per cent of employment
- . 62 per cent of wages and salaries
- . 53 per cent of vehicle rental-days
- . 55 per cent of takings from rentals

**TABLE 2.1 MAJOR DATA ITEMS BY STATE, 1986-87 AND 1991-92**

	<i>Business operating in this State at end June(a)</i>	<i>Employ- ment at end June</i>	<i>Wages and salaries</i>	<i>Vehicle rental- days</i>	<i>Takings from rentals</i>	<i>Takings per rental- day</i>
1991-92						
	No.	No.	\$m	'000	\$m	\$
New South Wales	62	768	14.3	1,238	89.4	72.21
Victoria	40	695	19.4	764	55.5	72.64
Queensland	75	639	13.4	1,392	97.1	69.76
South Australia	19	91	2.4	232	16.0	68.97
Western Australia	34	388	7.2	928	63.0	67.89
Tasmania	18	316	6.3	475	34.1	71.79
Northern Territory, Australian Capital Territory	11	119	2.3	183	18.2	99.45
<b>Australia(a)</b>	<b>222</b>	<b>3,016</b>	<b>65.3</b>	<b>5,212</b>	<b>373.3</b>	<b>71.62</b>
1986-87						
New South Wales	63	753	15.5	1,466	73.9	50.41
Victoria	71	817	15.9	1,193	60.8	50.96
Queensland	91	642	9.7	1,338	65.9	49.25
South Australia	23	175	2.9	364	18.3	50.27
Western Australia	40	315	5.4	754	33.5	44.43
Tasmania	17	201	2.7	431	14.9	34.57
Northern Territory, Australian Capital Territory	15	188	2.8	442	17.7	40.05
<b>Australia(a)</b>	<b>217</b>	<b>3,071</b>	<b>64.6</b>	<b>5,969</b>	<b>284.9</b>	<b>47.57</b>

(a) Multi-state businesses are counted in each State of operation, and hence States do not sum to the total for Australia.

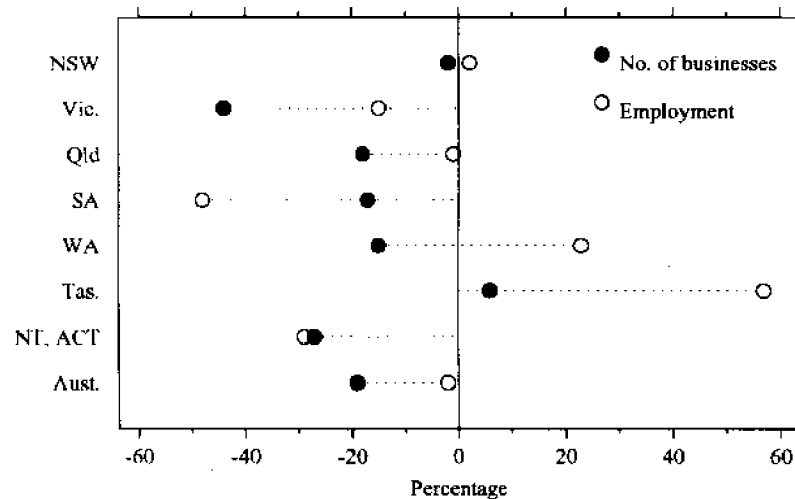
**TABLE 2.2 PERCENTAGE CHANGE IN MAJOR DATA ITEMS BETWEEN 1986-87 AND 1991-92, AUSTRALIA**

State	Businesses	Employment	Takings from rentals	Number of rental-days	Takings per rental-day
	%	%	%	%	%
New South Wales	-2	2	21	-16	43
Victoria	-44	-15	-9	-36	43
Queensland	-18	-1	47	4	42
South Australia	-17	-48	-13	-36	37
Western Australia	-15	23	88	23	53
Tasmania	6	57	129	10	108
Northern Territory, Australian Capital Territory	-27	-29	3	-59	148
<b>Australia</b>	<b>-19</b>	<b>-2</b>	<b>31</b>	<b>-13</b>	<b>51</b>

### Number of businesses

Between June 1987 and June 1992, there was a decrease in the total number of businesses operating in most States in the motor vehicle hire industry. Tasmania was the only State to show an increase (6 per cent). The decreases in the other States ranged from 44 per cent in Victoria to 2 per cent in New South Wales.

**CHART 2.1 NUMBER OF BUSINESSES AND EMPLOYMENT BY STATE, PERCENTAGE CHANGE BETWEEN END JUNE 1987 AND END JUNE 1992**



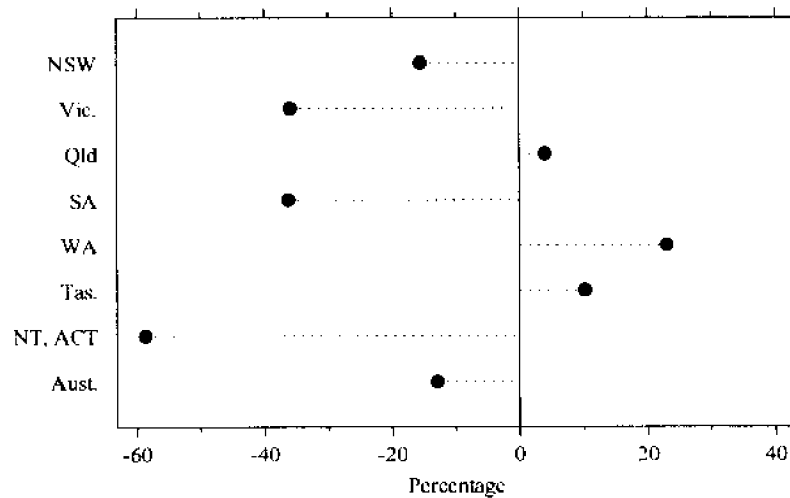
## Employment

During the 5 years to 1991-92, employment in the motor vehicle hire industry decreased by 2 per cent. On a State level, however, there were major differences in performance, with Tasmania and Western Australia recording increases of 57 and 23 per cent respectively, while South Australia decreased by 48 per cent.

## Vehicle rental-days

On an Australian basis, the number of vehicle rental-days decreased significantly (-13 per cent) in 1991-92 compared with 1986-87. During this period vehicle rental-days decreased in the majority of States. The Northern Territory and Australian Capital Territory experienced the largest decrease in vehicle rental-days (-59 per cent). The only States to experience an increase in the number of vehicle rental-days, were Queensland 4 per cent, Tasmania 10 per cent, and Western Australia 23 per cent.

**CHART 2.2 VEHICLE RENTAL-DAYS BY STATE, PERCENTAGE CHANGE BETWEEN 1986-87 AND 1991-92**



### More information?

The above table does not provide all of the data available at the State level. Using data synthesising procedures, data items collected at the Australian level can be split to provide State estimates.

## SECTION 3 BUSINESS SIZE

### Industry concentration statistics

Industry concentration statistics are concerned with providing measures of the extent to which a few businesses predominate in an industry and how the businesses in each size grouping differ in market influence.

To calculate the concentration statistics, businesses were ranked in descending order, according to their gross income. The ranked businesses were aggregated together into groups of four.

**TABLE 3.1 CONCENTRATION STATISTICS FOR MAJOR DATA ITEMS, AUSTRALIA, 1991-92**

<i>Businesses ranked by gross income</i>	<i>Businesses at end June 1992</i>	<i>Employment at end June 1992</i>	<i>Wages and salaries</i>	<i>Total fleet vehicles at end June</i>	<i>Takings from car and truck rental</i>	<i>Takings from</i>	<i>Operating</i>
						<i>long-term operating leases of vehicles</i>	<i>profit/loss before tax</i>
	No.	No.	\$m	No.	\$m	\$m	\$m
Largest four	4	1,541	39.5	10,870	195.8	64.1	-16.9
Second four	4	172	3.8	1,897	30.7	0	5.1
Third four	4	86	2.5	891	18.6	0.1	1.2
Fourth four	4	113	1.8	1,083	14.7	0.5	0.4
Fifth four	4	76	1.0	464	7.1	0	-0.3
Remainder	202	1,028	16.7	8,098	106.3	0.4	3.4
<b>Total</b>	<b>222</b>	<b>3,016</b>	<b>65.3</b>	<b>23,304</b>	<b>373.3</b>	<b>65.1</b>	<b>-7.1</b>

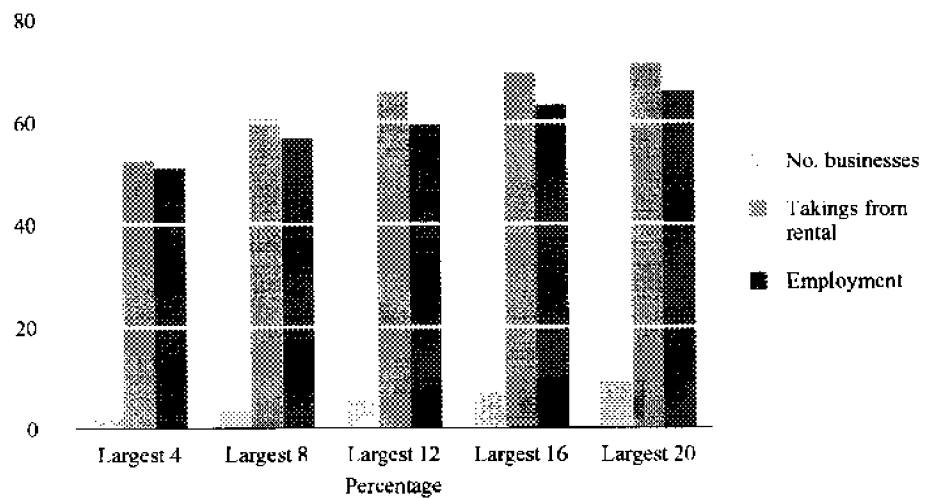
### A highly concentrated industry

In 1991-92, the motor vehicle hire industry was highly concentrated in four businesses. These largest four businesses accounted for:

- 98 per cent of takings from long-term operating leases
- 52 per cent of takings from car and truck rentals
- 51 per cent of employment
- 47 per cent of vehicles available for hire

The dominance of these businesses is seen in their major impact on the operating profit/loss before tax (OPBT) incurred by the industry as a whole. These businesses incurred a loss of almost \$17m and were primarily responsible for the loss (-\$7.1m) incurred by the industry.

**CHART 3.1 SUMMARY OF CONCENTRATION IN MOTOR VEHICLE HIRE INDUSTRY, AUSTRALIA, 1991-92**



**Businesses ranked by fleet size**

Another useful measure of business size which shows the contribution of various types of business, is by classifying according to fleet size.

Ninety-one businesses (41 per cent) had a fleet of 50 or more vehicles. These businesses accounted for 83 per cent of employment and 91 per cent of gross income and total expenses.

**TABLE 3.2 MAJOR PERFORMANCE INDICATORS FOR BUSINESSES RANKED BY FLEET SIZE, AUSTRALIA, 1991-92**

<i>Number of vehicles in fleet</i>	<i>Businesses at end June 1992</i> No.	<i>Employment at end June 1992</i> No.	<i>Takings from car and truck rental</i> \$m	<i>Gross income</i> \$m	<i>Total expenses</i> \$m	<i>Operating profit/loss before tax</i> \$m
1-9	21	73	1.8	1.9	*2.0	-0.1
10-19	36	136	8.7	9.6	*9.6	*0.2
20-49	73	309	26.7	31.5	30.7	*0.5
50-99	62	423	62.1	67.7	65.1	2.7
100-199	15	244	28.5	33.0	32.9	*0.1
200-799	10	387	55.6	62.1	55.9	6.2
800 or more	4	1,444	189.9	264.4	280.8	-16.5
<b>Total fleet</b>	<b>222</b>	<b>3,016</b>	<b>373.3</b>	<b>470.3</b>	<b>477.1</b>	<b>-7.1</b>



**TABLE 3.3 SUMMARY OF OPERATIONS BY EMPLOYMENT SIZE, AUSTRALIA, 1986-87 and 1991-92**

Employment size category at end June	Businesses at end June No.	Employment at end June No.	Wages and salaries \$m	Operating profit before tax \$m	Takings from car and truck rental \$m	Takings from long-term operating leases of vehicles \$m	Gross income \$m	Total fleet vehicles at end June No.
1991-92								
0-4 persons	109	296	4.5	0.3	30.2	0.1	33.8	2,842
5-9 persons	72	482	8.3	3.0	56.9	0.4	64.8	3,926
10-19 persons	24	297	5.6	1.5	37.7	0.4	40.6	2,360
<b>Total small businesses</b>	<b>205</b>	<b>1,075</b>	<b>18.4</b>	<b>4.9</b>	<b>124.8</b>	<b>0.9</b>	<b>139.2</b>	<b>9,128</b>
20 or more persons	17	1,941	47.0	-12.0	248.4	64.3	331.1	14,176
<b>Total</b>	<b>222</b>	<b>3,016</b>	<b>65.3</b>	<b>-7.1</b>	<b>373.3</b>	<b>65.1</b>	<b>470.3</b>	<b>23,304</b>
1986-87								
0-4 persons	127	319	3.0	n.a.	n.a.	n.a.	n.a.	2,836
5-9 persons	58	379	4.6	n.a.	n.a.	n.a.	n.a.	3,004
10-19 persons	18	264	4.2	n.a.	n.a.	n.a.	n.a.	2,352
<b>Total small businesses</b>	<b>203</b>	<b>962</b>	<b>11.8</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>8,192</b>
20 or more persons	14	2,109	42.8	n.a.	n.a.	n.a.	n.a.	13,940
<b>Total</b>	<b>217</b>	<b>3,071</b>	<b>54.6</b>	<b>n.a.</b>	<b>284.9</b>	<b>33.4</b>	<b>n.a.</b>	<b>22,132</b>

**Small businesses**

Small businesses (those with employment of less than 20 persons) accounted for 92 per cent of all businesses in this industry but only 36 per cent of employment. The proportion of small businesses increased marginally since 1986-87, while employment in small businesses increased by 12 per cent.

These businesses provided 39 per cent of the motor vehicles available for hire but earned only 33 per cent of the takings from car/truck hire generated by the industry.

The proportion of businesses with employment less than five persons was 59 per cent in 1986-87 and 49 per cent in 1991-92. These businesses, however, employed only 10 per cent of persons in the industry and provided only 12 per cent of motor vehicles available for hire.

**More information?**

Statistics for non-standard size groupings based on employment, income or some other data item, can be made available on request.

## SECTION 4 EMPLOYMENT

**TABLE 4.1 TYPE OF EMPLOYMENT, AUSTRALIA, END JUNE 1992**

Type of employment	Males			Females			Total		
	Full-time No.	Part-time No.	Total No.	Full-time No.	Part-time No.	Total No.	Full-time No.	Part-time No.	Total No.
Working proprietors and partners	29	6	35	15	6	21	44	12	56
Working directors of incorporated companies and trusts	190	20	211	77	12	89	268	32	300
Permanent employees	985	9	994	1,053	16	1,068	2,037	25	2,062
Casual employees	87	229	316	99	183	282	187	411	598
<b>Total end June 1992</b>	<b>1,292</b>	<b>264</b>	<b>1,556</b>	<b>1,244</b>	<b>217</b>	<b>1,460</b>	<b>2,536</b>	<b>481</b>	<b>3,016</b>
<b>Total end June 1987</b>	<b>1,506</b>	<b>231</b>	<b>1,737</b>	<b>1,080</b>	<b>254</b>	<b>1,334</b>	<b>2,586</b>	<b>485</b>	<b>3,071</b>

### Type of employment Males/females

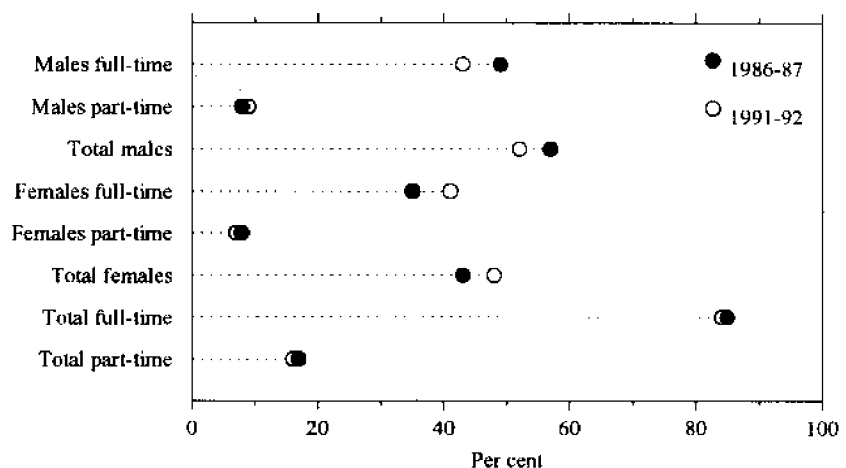
Between 1986-87 and 1991-92, total employment in the motor vehicle hire industry decreased by 2 per cent. Male employment dropped by 10 per cent, whereas female employment increased by 9 per cent.

Of the 3,016 people employed in the industry at the end of June 1992, 52 per cent were males and 48 per cent were females. This compared with the total Australian labour force where males comprised 58 per cent of employment and females 42 per cent.

### Working proprietors, partners and directors

Approximately 2 per cent of people working in this industry were working proprietors and partners of unincorporated businesses. Working directors of incorporated companies represented 10 per cent of persons working in the industry. Only 38 per cent of working proprietors and partners and 30 per cent of working directors were women.

**CHART 4.1 TYPE OF EMPLOYMENT, AUSTRALIA,  
JUNE 1987 AND JUNE 1992**



### Full-time and part-time employment

Eighty-four per cent of employment in the motor vehicle hire industry was on a full-time basis. This proportion did not change in the five years to June 1992. However, full-time employment for males dropped by 14 per cent and increased by 15 per cent for females between end June 1987 and end June 1992.

In the motor vehicle hire industry, part-time employment contribution to total employment was 16 per cent both to the end of June 1987 and end of June 1992.

### Casual employment

Casual employees comprised 20 per cent of employment in the motor vehicle hire industry in 1991-92. A majority (69 per cent) of casual employees worked on a part-time basis. Fifty-three per cent of casual employees were males.

CHART 4.2 PERCENTAGE CHANGE IN THE TYPE OF EMPLOYMENT BETWEEN 1986-87 AND 1991-92, AUSTRALIA

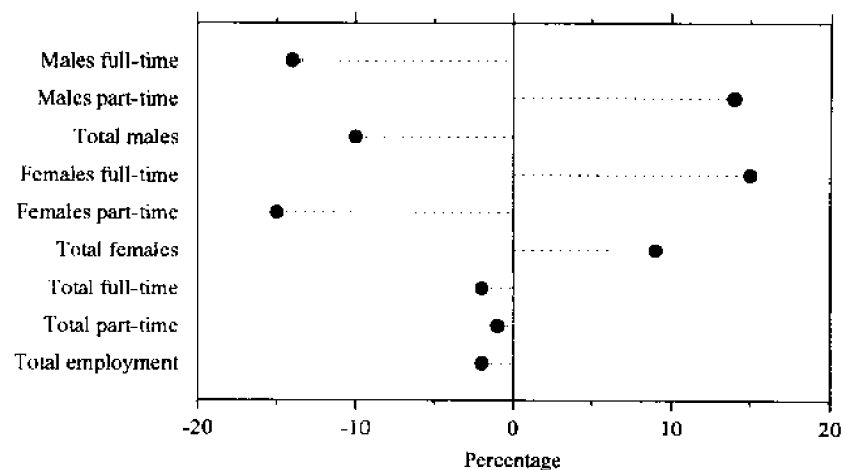


TABLE 4.2 WAGES AND SALARIES PAID BY TYPE OF EMPLOYMENT, AUSTRALIA, 1991-92

Type of employment	Employees at end June (a)			Wages and salaries paid for the year ended 30 June \$m
	Full-time No.	Part-time No.	Total No.	
Working directors of incorporated companies and trusts	268	32	300	6.7
Permanent employees	2,037	25	2,062	53.3
Casual employees	187	411	598	5.3
<b>Total 1991-92</b>	<b>2,492</b>	<b>468</b>	<b>2,960</b>	<b>65.3</b>
<b>Total 1986-87</b>	<b>2,444</b>	<b>439</b>	<b>2,883</b>	<b>54.8</b>

(a) Excludes working proprietors and working partners of unincorporated businesses.

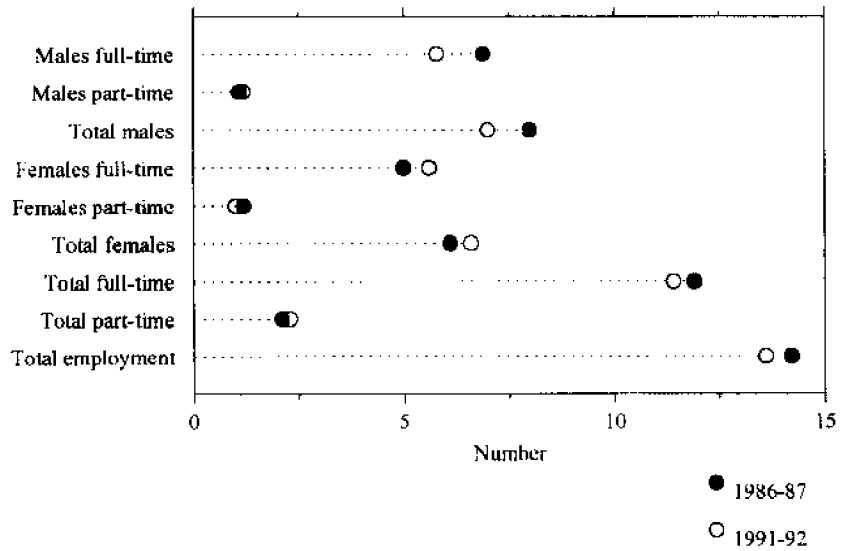
**Permanent employees**

The majority of persons working in the motor vehicle hire industry were permanent employees. On average these employees were paid \$26,000 in wages and salaries during 1991-92.

**Average weekly earnings**

Between 1986-87 and 1991-92, average weekly earnings of employees in the motor vehicle hire industry increased 24 per cent to \$424.00. The average weekly earnings within the motor vehicle hire industry during 1991-92 was 16 per cent below the Australian average weekly earnings (\$500.75).

**CHART 4.3 EMPLOYMENT PER BUSINESS, AUSTRALIA, 1986-87 AND 1991-92**



**More information?**

More detailed tables are available which focus on the performance of businesses that have only female, only male, and both male and female working directors or working proprietors and partners.

## SECTION 5 INCOME

TABLE 5.1 DETAILED COMPONENTS OF GROSS INCOME, AUSTRALIA, 1986-87 AND 1991-92

Components of income	1986-87		1991-92	
	\$m	%	\$m	%
<b>Operating income</b>				
Takings from car rental	235.6	53.3	337.7	71.8
Takings from truck rental	49.3	11.1	35.6	7.6
Takings from long-term operating leases of motor vehicles	33.4	7.6	65.1	13.8
Takings from sales of motor vehicles	55.6	12.6	9.8	2.1
Other operating income	34.3	7.8	9.8	2.1
<b>Total operating income</b>	<b>408.2</b>	<b>92.3</b>	<b>458.1</b>	<b>97.4</b>
(Sale of goods and services)				
<b>Non-operating income</b>				
Takings from finance leases of motor vehicles (a)	34.0	7.7	n.a.	..
Franchise and licence fees and royalties	n.p.	..	9.2	2.0
Interest income (a)	n.a.	..	3.5	0.7
Other non-operating income (b)	n.a.	..	-0.5	-0.1
<b>Total non-operating income</b>	<b>n.a.</b>	<b>..</b>	<b>12.2</b>	<b>2.6</b>
<b>Gross income</b>	<b>442.2</b>	<b>100.0</b>	<b>470.3</b>	<b>100.0</b>

(a) In 1986-87, takings from finance leases was collected as a separate income component. In 1991-92, takings from finance leases was included in the interest income data item. (b) In 1986-87, dividends and income from the sale of fixed assets were not collected. In 1991-92, these two income components were included in the 'other' non-operating income data item.

### Increased specialisation in the motor vehicle hire industry

Compared with 1986-87, the motor vehicle hire industry in 1991-92 derived a much greater proportion of its income from a smaller range of income items. The contribution to total operating income of takings from car and truck rental and takings from long-term operating leases increased from 78 per cent to 96 per cent.

- The contribution of takings from car and truck hire to total operating income increased from 70 per cent in 1986-87 to 81 per cent in 1991-92.
- Takings from long-term operating leases increased from 8 per cent to 14 per cent in 1991-92.

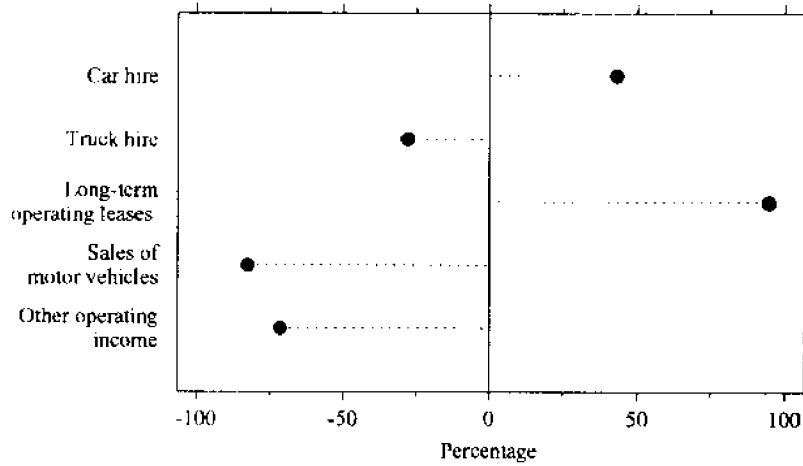
### Takings from vehicle hire

Between 1986-87 and 1991-92, takings from vehicle rental/hire increased by 31 per cent to \$373.3m. The two components of vehicle hire, car and truck hire, differed in their performance. Whilst takings from car hire increased by 43 per cent to \$337.7m, takings from truck hire dropped by 28 per cent to \$35.6m.

### Takings from the sales of motor vehicles

In sharp contrast with the expansion and specialisation of the industry in vehicle hire, takings from the sales of motor vehicles dropped dramatically (82 per cent) to \$9.8m between 1986-87 and 1991-92.

**CHART 5.1 CHANGES BETWEEN 1986-87 AND 1991-92 IN MAJOR INCOME ITEMS, AUSTRALIA**



**Total operating income per person employed**

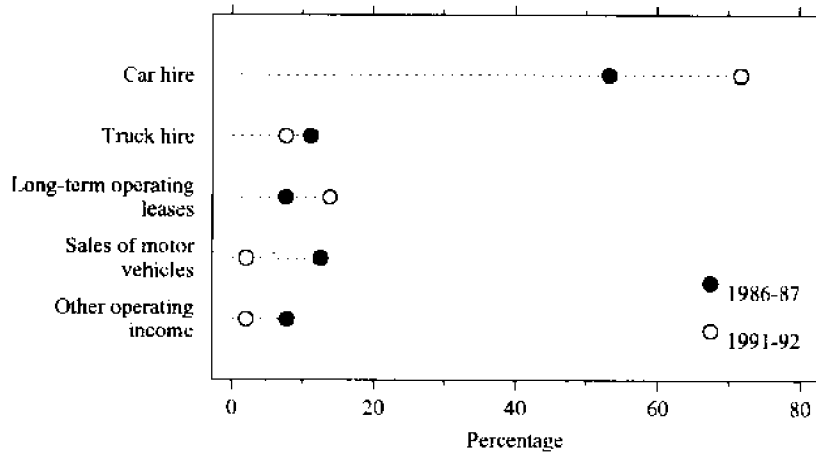
Operating income per person employed increased by only 14 per cent between 1986-87 and 1991-92.

**Total operating income per rental-day**

There were 224 rental-days per vehicle during 1991-92: each vehicle generated income for only 61 per cent of the year. This was a reduction in car usage compared with 1986-87 when the average number of rental-days per vehicle was 271 and each car was generating income for 74 per cent of the year.

Whilst the number of vehicle rental-days dropped by 13 per cent between 1986-87 and 1991-92, operating income per rental-day increased 29 per cent from \$68.16 to \$87.89.

**CHART 5.2 PROPORTION OF INCOME COMPONENTS TO GROSS INCOME, AUSTRALIA, 1986-87 AND 1991-92**



**More information?**

Income data analysis using the mean, median, mode, and deciles, is available on request. This information is also available by business size groupings.

## SECTION 6 EXPENSES

### Comparability between 1986-87 and 1991-92 data

Direct comparability between 1986-87 and 1991-92 data is not possible for many individual expense items. This is due to differences in questionnaire design (particularly with respect to interest expenses for finance leases) and differences in accounting standards (particularly with respect to depreciation expenses of assets on finance leases) introduced between the two collections.

Details concerning the comparability of 1986-87 and 1991-92 data are contained in the footnotes to Table 6.1 Detailed Components of Total Expenses, and in paragraphs 16-21 of the Explanatory Notes.

Total expenses incurred by the motor vehicle hire industry increased from \$449.4m to \$477.1m (6 per cent).

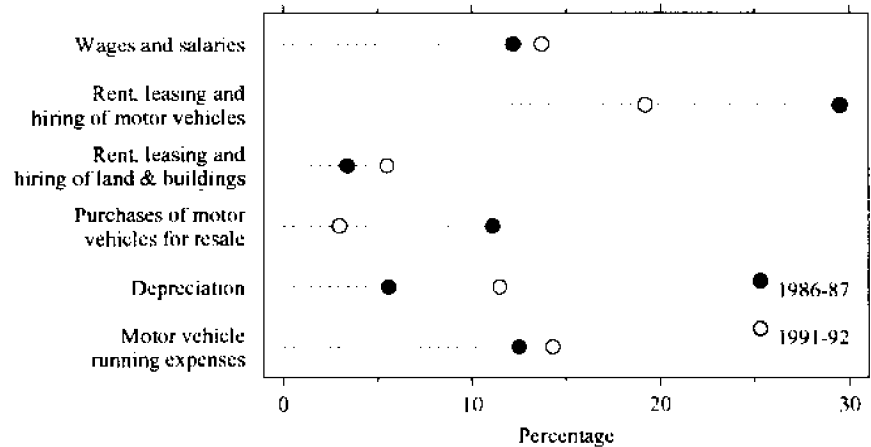
Total labour costs increased by 21 per cent even though there was a 2 per cent drop in employment. Motor vehicle running expenses increased by 22 per cent; this increase was partly attributed to a 5 per cent increase in the number of vehicles in the rental fleet.

### Percentage contributions to total expenses

The largest expense items in 1991-92 were:

- Rent, leasing and hiring of motor vehicles (contributing 19 per cent to total expenses);
- Motor vehicle running expenses (14 per cent of total expenses);
- Wages and salaries (14 per cent of total expenses); and
- Interest expenses (10 per cent of total expenses).

**CHART 6.1 PROPORTION OF MAJOR EXPENSE ITEMS TO TOTAL EXPENSES, AUSTRALIA, 1991-92**



**TABLE 6.1 DETAILED COMPONENTS OF TOTAL EXPENSES, AUSTRALIA,  
1986-87 AND 1991-92**

Components of expense	1986-87		1991-92	
	Value	Percentage of total expenses	Value	Percentage of total expenses
	\$m	per cent	\$m	per cent
<b>Labour -</b>				
Wages and salaries	54.8	12.2	65.3	13.7
Employer contribution to superannuation funds	0.6	0.1	1.8	0.4
Workers compensation costs	0.8	0.2	0.9	0.2
<b>Total labour costs</b>	<b>56.2</b>	<b>12.5</b>	<b>68.0</b>	<b>14.3</b>
<b>Rent, leasing and hiring -</b>				
Land, building and other structures	15.2	3.4	26.4	5.5
Motor vehicles	132.4	29.5	91.8	19.2
Plant, machinery and other equipment	2.8	0.6	1.5	0.3
<b>Total rent, leasing and hiring costs (a)</b>	<b>150.4</b>	<b>33.5</b>	<b>119.7</b>	<b>25.1</b>
<b>Purchases of goods for resale -</b>				
Motor vehicles (b)	49.9	11.1	14.3	3.0
Other purchases (c)	8.8	2.0	7.8	1.6
<b>Total purchases of goods for resale</b>	<b>58.6</b>	<b>13.0</b>	<b>22.1</b>	<b>4.6</b>
<b>Depreciation -</b>				
Building and other structures	0.6	0.1	1.9	0.4
Other fixed tangible assets	24.4	5.4	52.9	11.1
<b>Total depreciation</b>	<b>25.0</b>	<b>5.6</b>	<b>54.8</b>	<b>11.5</b>
<b>Selected operating expenses -</b>				
Motor vehicle running expenses (c)	56.2	12.5	68.4	14.3
Insurance premiums	12.6	2.8	7.8	1.6
Advertising	10.9	2.4	11.5	2.4
Agency commission expenses	7.5	1.7	9.6	2.0
Credit card commissions (d)	n.a.	..	3.9	0.8
Other expenses	45.3	10.1	49.4	10.4
<b>Total selected operating expenses</b>	<b>132.4</b>	<b>29.5</b>	<b>150.6</b>	<b>31.6</b>
<b>Total operating expenses</b>	<b>422.6</b>	<b>94.0</b>	<b>415.2</b>	<b>87.0</b>
<b>Non-operating expenses -</b>				
Franchise fees, license fees and royalties expenses	n.p.	..	8.0	1.7
Interest expenses (a)	26.8	6.0	48.4	10.1
Bad debt written off (d)	n.a.	..	5.5	1.2
<b>Total non-operating expenses</b>	<b>n.a.</b>	<b>..</b>	<b>61.9</b>	<b>13.0</b>
<b>Total expenses</b>	<b>449.4</b>	<b>100.0</b>	<b>477.1</b>	<b>100.0</b>

(a) In 1986-87, finance lease expenses were included in rent, leasing and hiring expenses. In 1991-92, expenses in respect to finance leases were included in interest expenses; depreciation expenses for assets on lease were included in the depreciation expense item. (b) Includes motor vehicles purchased solely for wholesale or retail sale. (c) In 1986-87 fuels were included in motor vehicle running expenses. In 1991-92, fuels were included in purchases of goods for resale. (d) Credit card commissions and bad debts written off were not collected as separate data items in 1986-87 but were included in the 'other' expense item.

**More information?**

Expenses data analysis using mean, median, mode, and deciles is also available.



## SECTION 7 ASSETS, LIABILITIES AND NET WORTH

**TABLE 7.1 ASSETS, LIABILITIES AND NET WORTH, AUSTRALIA,  
AT END JUNE 1992**

<i>Items</i>	<i>Value</i>
	\$m
<b>Assets</b>	
Current assets	
Closing stock	3.8
Other current assets	200.4
<b>Total current assets</b>	<b>204.2</b>
Non-current assets	313.3
<b>Total value of assets</b>	<b>517.4</b>
<b>Liabilities</b>	
Current liabilities	370.5
Non-current liabilities	98.9
<b>Total value of liabilities</b>	<b>469.4</b>
<b>Net worth</b>	<b>48.0</b>

### Assets

Total assets comprise current (ie assets which are reasonably expected to be realised, sold or consumed usually within a period of 12 months) and non-current (ie depreciable assets). In the motor vehicle hire industry at end June, 39 per cent of assets were current and 61 per cent were non-current.

Assets acquired under finance leases by businesses in the motor vehicle hire industry belong to the lessee and are therefore included as assets. Assets used under an operating lease are excluded, thus may lead to some understatement of the value of assets used in this industry.

### Liabilities

As with assets, there are also current (ie money owed to creditors) and non-current (ie a loan taken over a number of years) liabilities. In 1991-92 current liabilities in the motor vehicle hire industry represented 79 per cent of the total value of liabilities, and non-current liabilities represented 21 per cent.

Current liabilities require the use of current assets (or incurring additional current liabilities) to eliminate them. The proportion of total assets financed by creditors is an important indication of the financial stability of a business or industry.

In the motor vehicle hire industry in 1991-92, current liabilities (\$370.5m) considerably exceeded current assets (\$204.2m).

### Net worth

In June 1992, the net worth of the motor vehicle hire industry was \$48m with total assets of \$517.4m and total liabilities of \$469.4m.

## SPECIAL DATA SERVICES

- The Service Industries Census on the Motor Vehicle hire industry, allows for a wider range of data to be made available than is contained in this publication. Two examples of standard products that can be made available on request are industry ratios and income and expense data analysis.
- Other statistical products can be tailored to satisfy the specific requirements of clients.
- For further information on unpublished statistics that can be made available, contact Dennis Robson, on Melbourne (03) 615 7634.

## TECHNICAL NOTES

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### Introduction

1. The 1991-92 census of the motor vehicle hire industry was part of a series of surveys of service industries. The motor vehicle hire industry was previously surveyed in 1986-87. Some comparative statistics relating to 1986-87 are included in this publication. More detailed data are available on request as a special data service.

### Scope

2. The scope of the census included all businesses classified to class 7741 (Motor Vehicle Hiring) of the 1993 edition of the Australian and New Zealand Standard Industrial Classification (ANZSIC). This class consisted of units mainly engaged in leasing, hiring or renting motor vehicles from their own stocks, without drivers.

3. The census, however, was developed and conducted using businesses selected on the basis of their classification to industry class 5711 (Motor Vehicle Hire) using the 1983 edition of the Australian Standard Industry Classification (ASIC).

4. For the motor vehicle hire industry, the single difference between these two industry classifications is the inclusion of Motor Vehicle Hire *for periods greater than one year*, as an activity primary to ANZSIC Class 7741. ASIC Class 5711 excludes businesses whose predominant activity was hire or rental for periods of 12 months or more. These businesses were included in ASIC Class 4861. As a result, fleet management businesses while being part of ANZSIC Class 7741 have been excluded from this census.

5. The scope of the census excluded businesses which did not have employees. These businesses contribute a relatively small proportion of the total economic activity and their exclusion from the collection would not have a significant impact on the published data.

6. A very small number of businesses ceased employing staff during the 1991-92 reference period, ie they became non-employing businesses. It is normal ABS procedure to include the contributions of these businesses in the survey output.

### Coverage

7. The census population was selected from the ABS' business register.

8. Franchising is common in the motor vehicle hire industry. Both franchisors and franchisees were included in the census. However, no statistics were collected to show the relationships between these businesses nor further concentration of market share by franchised chains.

### Statistical unit

9. The unit for which statistics are reported in the census of the motor vehicle hire industry is the management unit. In this publication, management units are referred to as businesses.

## TECHNICAL NOTES - *continued*

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10. The management unit is the highest-level accounting unit within a business, having regard for industry homogeneity, for which accounts are maintained; in nearly all cases it coincides with the legal entity owning the business (ie company, partnership trust, sole operator, etc). In the case of large diversified businesses, however, there may be more than one management unit, each coinciding with a 'division' or 'line of business'. A division or line of business is recognised where separate and comprehensive accounts are compiled for it.

11. Many businesses also operate as franchisees to these management units. In this situation both the franchisee and franchisor businesses are included as separate management units in these statistics.

### Collection methodology

12. The 1991-92 collection was a census. The 1986-87 collection was a survey derived from a full enumeration of the larger units and a sample of the smaller units.

### State data

13. Data were collected from the Australia-wide operations of each business. To enable State statistics to be compiled, businesses which operated in more than one state were asked to provide a dissection of employment, wages and salaries, number of vehicle rental days, and takings from rentals.

### Reference period

14. Data contained in this publication relate to all businesses which operated in Australia during the year ended 30 June 1992. Counts of businesses include only those businesses that were operating at 30 June 1992 unless otherwise specified.

### Comparability with previous statistics

15. **Collection Unit** The standard units definitions employed in the system of integrated economic statistics were revised in 1988-89. Prior to this period, the enterprise was the statistical unit for which data was collected.

16. The 1991-92 census was collected from management units, whereas the 1986-87 survey was collected from enterprise units. However, for the majority of businesses (particularly the smaller businesses), the management unit and enterprise are expected to be one and the same. In this publication the term "business" means management unit.

17. **Non-employing units** The 1986-87 collection included businesses both with and without employees (eg sole proprietorships and partnerships with no employees). To facilitate comparisons with the 1991-92 census, the contribution made by businesses with zero employees in the earlier collection has been removed.

18. **ASIC** The 1986-87 survey of the motor vehicle hire industry used the 1983 ASIC whereas the 1991-92 census used the 1993 ANZSIC. Changes that were implemented in the 1993 ANZSIC have been outlined in paragraph four above.

## TECHNICAL NOTES - *continued*

19. **Data definitions** There were differences in the way some data items were defined between the 1986-87 and 1991-92 motor vehicle hire collections.

- . Credit card commissions and bad debts written off were not collected as separate data items in 1986-87 but were included in 'Other' expense item.
- . In 1986-87, motor vehicle running expenses included fuel purchased for resale. In 1991-92 fuel purchased for resale was included in the "Purchases of goods for resale" expense item.

20. **Changes in accounting standards** Accounting standards regarding the handling of expenses and income associated with finance leases changed between 1986-87 and 1991-92. The differences are summarised below:

For lessees:

- . In 1986-87 lessees expenses were treated as a rent leasing and hiring expenses.
- . In 1991-92 lessees expenses are treated as interest expenses. Depreciation expenses for assets on lease were included in the depreciation expense item.

For lessors

- . In 1986-87 lessors incomes were treated as a separate income component.
- . In 1991-92 lessors incomes were treated as interest income and a reduction in an asset.

### Reliability of estimates

21. As the information in this publication has been compiled from a census of all businesses classified to the industry, the estimates in this publication are not subject to sampling error. However the estimates are subject to non-sampling error.

Non-sampling error may occur because of deficiencies in the register of units from which the population was identified, non-response and imperfections in reporting by respondents. Every effort has been made to reduce non-sampling error to a minimum by careful design and testing of questionnaires, efficient operating procedures and systems used to compile the statistics.

### Other Service Industries publications

22. The 1991-92 survey of service industries also included several other tourism-related industries. Statistics for these industries will be released in two separate publications:

- . *Hospitality Industries, Australia, 1991-92* (8674.0).

This publication includes the five industries which together comprise the hospitality industries (ie Licensed clubs, Pubs bars and taverns, Accommodation, Cafes and Restaurants, and Casinos). Data items include information about employment, income, expenses, live entertainment, and some measures of profitability.

- . *Amusement and Theme Parks, Australia, 1991-92* (8675.0).

Data in this publication includes number of visitors by month, details of employment, components of income and the number and cost of live performances by Australian and overseas resident musicians and entertainers.

## GLOSSARY OF TERMS

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<b>Agency commission expenses</b>	Are expenses incurred by a motor vehicle rental business when it offers other businesses (eg travel agents) an agency commission to rent vehicles to clients.
<b>Businesses at 30 June 1992</b>	Count of management units operating at 30 June 1992.
<b>Concentration statistics</b>	To calculate concentration statistics, businesses were ranked in descending order according to their gross income. The ranked businesses were aggregated into groups of four.
<b>Current assets</b>	Are cash or other assets of a business that would normally be consumed or converted into cash within 12 months of the end of the last financial period. Excludes closing stocks unless otherwise specified.
<b>Current liabilities</b>	Are liabilities of the business that would normally be due or payable by the business within 12 months of the end of the last financial period, eg trade creditors and other accounts payable.
<b>Earnings before interest and tax (EBIT)</b>	A measure of profit prior to the deduction of interest expenses and income tax.
<b>Finance leases</b>	Refers to a lease which effectively transfers from the lessor to the lessee substantially all the risks and benefits incident to ownership of the leased property.
<b>Franchise fees, licence fees and royalties income</b>	Franchise and licence fees paid to the franchisor, especially for the right to operate the business as part of a franchise 'network'.
<b>Gross Domestic Product</b>	The total market value of goods and services produced in Australia after deducting the cost of goods and services used up in the process of production (intermediate consumption), but before deducting consumption of fixed capital.
<b>Gross income</b>	Sum of income items, ie takings from motor vehicle hire or rental, takings from long-term operating leases of motor vehicles, franchise fees, licence fees and royalties income, sales of goods, interest income, dividends received, net profit (or loss) on the sale of fixed tangible assets, net profit (or loss) on foreign exchange and 'other' income.
<b>Industry Gross Product</b>	Is sales of goods and services, plus other rent, leasing and hiring income, plus closing stocks minus opening stocks, minus purchases and selected expenses. (Selected expenses includes motor vehicle running expenses, rent, leasing and hiring, other advertising, agency commission, credit card commissions).
<b>Labour costs</b>	Includes wages and salaries, superannuation and workers' compensation
<b>Net worth</b>	Is the total assets minus total liabilities and is equal to the interest of shareholders or other owners in the assets of the business.

## GLOSSARY OF TERMS - *continued*

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<b>Non-current assets</b>	Are depreciable assets; they consist of all assets other than current assets and can include intangible assets such as patents and franchises.
<b>Non-current liabilities</b>	Are amounts payable over a longer period; ie they are not due within the next financial year. They consist of all liabilities other than current liabilities and include bank loans, debentures and unsecured notes.
<b>Non-operating income</b>	Includes interest income, franchise fees, licence fees and royalties, dividends received, takings from finance leases of motor vehicles and net profit (or loss) from the sale of fixed tangible assets.
<b>Opening stocks and closing stocks</b>	The value of all stocks of finished goods, work-in-progress, raw materials, fuels, containers, etc. at the beginning and end of the financial year, respectively.
<b>Operating income (Sales of goods and services)</b>	Is income related to the ordinary activities of the business. Includes takings from car and truck rental, long-term operating leases of motor vehicles, 'other' operating income, sales of motor vehicles and other goods.
<b>Operating lease</b>	Refers to a lease under which the lessor effectively retains all the risks and benefits incident to ownership of the leased property. The lessor claims depreciation expenses.
<b>Operating profit before tax (OPBT)</b>	A measure of profit before extraordinary items are brought to account and prior to the deduction of income tax and appropriations to owners (eg dividends paid).
<b>Operating profit margin</b>	The percentage of sales of goods and services available as operating profit, ie $(\text{Operating profit before tax} \times 100) / \text{Sales of goods and services}$ .
<b>'Other' expenses</b>	Other expenses was a separate data item included in the census questionnaire. It included office supplies and printing costs, freight charges by other businesses, contract and sub-contract expenses, fringe benefits tax and payroll tax.
<b>'Other' income</b>	Other income was a separate data item included in the census questionnaire. It included agency commissions, receipts from insurance claims, rental income not included elsewhere and net profit (or loss) on the sale of fixed tangible assets eg motor vehicles charged to capital accounts. It excluded extraordinary profits or losses such as those associated with the sale of a segment of the business or goodwill revaluations.
<b>Profit per vehicle</b>	The amount of operating profit before tax from each vehicle, ie $\text{Operating profit before tax} / \text{Number of vehicles}$ .
<b>Purchases and selected expenses</b>	Purchases and selected expenses equal the cost of sales. Includes purchases of goods for resale and payments made for services provided by other businesses such as rent, leasing and hiring of land and buildings.

## GLOSSARY OF TERMS - *continued*

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**Persons employed at 30 June 1992**

Includes working proprietors and working partners of unincorporated businesses, working directors of incorporated companies and trusts, employees entitled to take paid holidays and casual employees who are not entitled to take paid holidays, working for a business during the last pay period ending in June 1992.

**Full-time employees**

Employees who work 35 hours per week or more.

**Part-time employees**

Employees who work less than 35 hours per week.

**Casual employees**

Employees not entitled to take paid holidays.

**Permanent employees**

Employees entitled to take paid holidays.

**Rental-days per vehicle**

The average number of days each vehicle is rented, ie  $\text{Rental-days/Number of vehicles}$

**Takings from car and truck rental**

Is income from motor vehicle hire or rental for periods of less than 12 months and includes gross income from agents. This income is attributable to the State in which rentals were commenced.

**Takings from operating leases**

Operating leases of a business' vehicles are rented out for periods of 12 months or more. Includes income from all operating leases to franchises and income from fleet management.

**Total expenses**

Sum of expense items, ie wages and salaries, employer contributions to superannuation funds, workers' compensation costs, insurance premiums, rent, leasing and hiring expenses, motor vehicle running expenses, franchise fees, licence fees and royalties expenses, purchases of goods for resale, interest expenses, depreciation on buildings and other fixed tangible assets, advertising expenses, agency commission expenses, credit card commissions, bad debts written off and 'Other' expenses.

**Trading profit**

A measure of profit directly attributable to trading in goods and services. It is derived by deducting the cost of sales from sales of goods and services.

**Vehicle rental-days**

Is the product of the number of vehicles by the number of days each vehicle in the rental fleet was rented during the year. In tables where vehicle rental-days are presented by state, the vehicle rental days were allocated to the State in which the vehicle rentals were commenced.

**Wages and salaries**

Are gross earnings of all employees before taxation and other deductions. Drawings of working proprietors and working partners of unincorporated businesses are excluded.



## SYMBOLS AND OTHER USAGES

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### Symbols

The following symbols, where shown in columns of figures or elsewhere in tables mean:

— nil or rounded to zero

.. not applicable

n.a. not available

n.p. not available for separate publication, but included in totals where applicable

Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

### Abbreviations

ABS Australian Bureau of Statistics

ANZSIC Australian and New Zealand Standard Industrial Classification

ASIC Australian Standard Industrial Classification

# Most people don't know *how* statistics can help them.....

Charts, commentary  
and analysis

## Help is available

The ABS has a range of statistics for the tourism industry that will assist with informed decision-making.

- . Accommodation
- . Cafes and restaurants
- . Licensed clubs
- . Pubs, bars, and taverns
- . Casinos
- . Amusement and theme parks

### *Publications :*

*Hospitality Industries, Australia, 1991-92 (Catalogue 8674.0)*

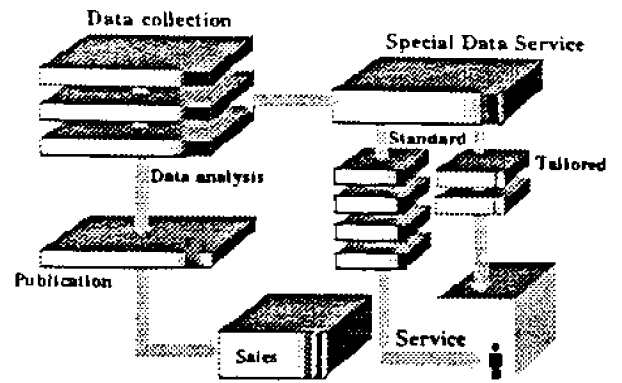
*Amusement and Theme Parks, Australia , 1991-92 (Catalogue 8675.0)*

### *Topics covered :*

Expenses items	Gambling
Components of income	Live entertainment
Employment	Concentration statistics
Business size	State comparisons

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Additional data will be released progressively for the 1991-92 Hospitality industries.

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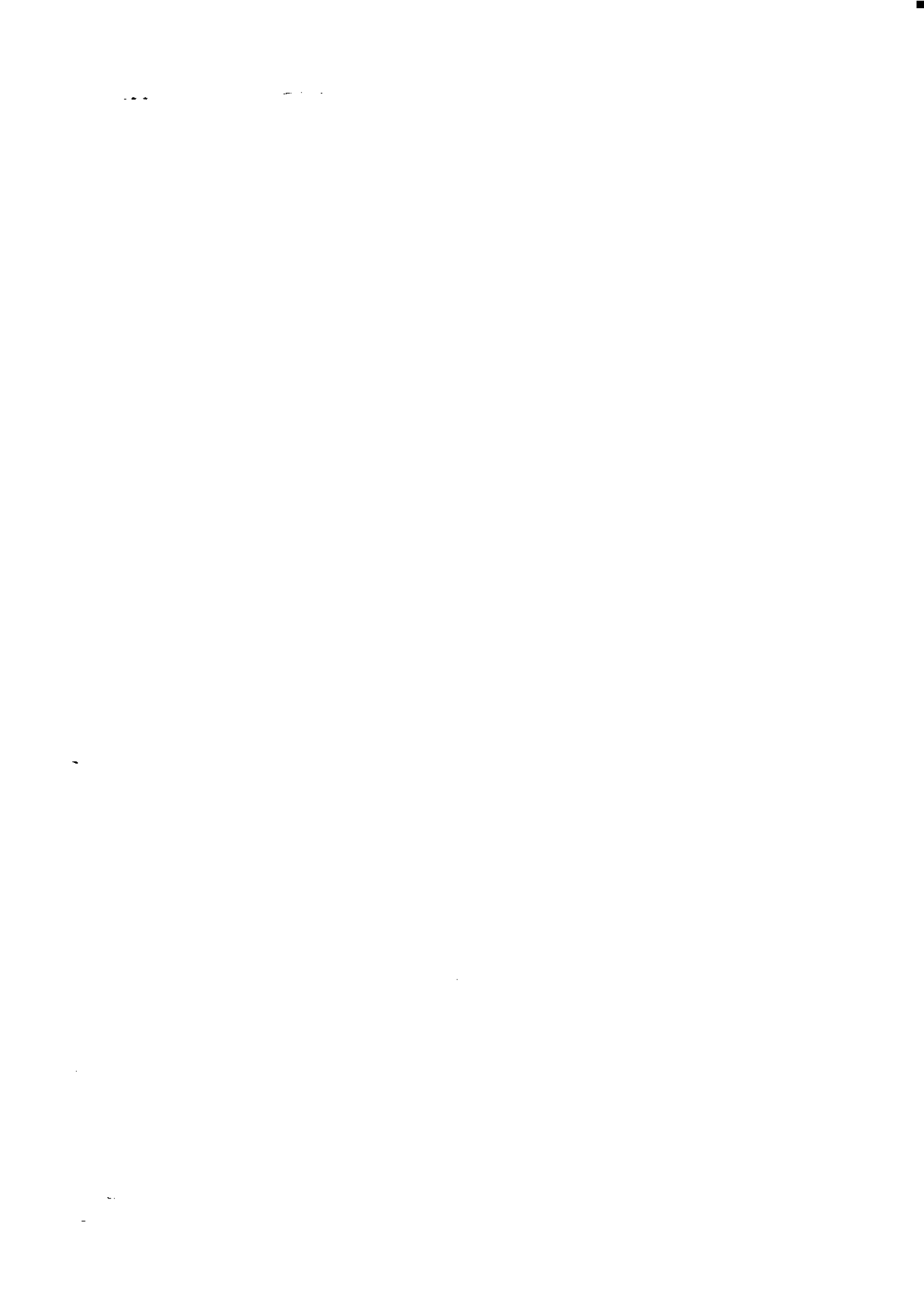
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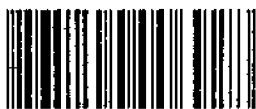
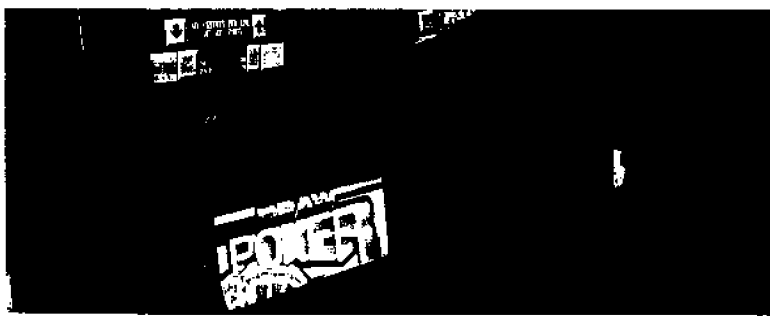
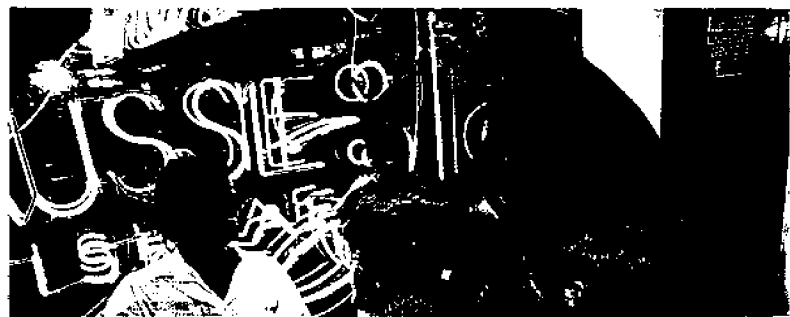
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