

Chapter 11

Tourism and Culture

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OVERVIEW

Victoria is one of Australia's most naturally diverse States with a variety of natural features, cultural activities and historic sites.

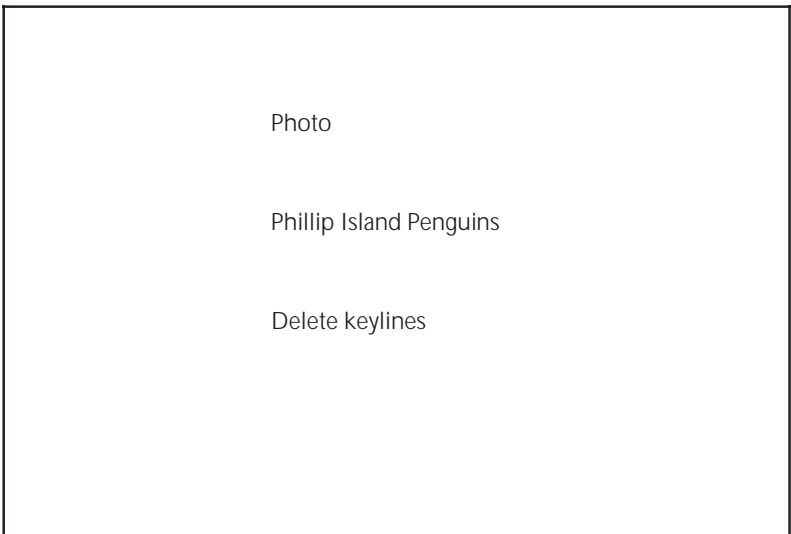
As a tourist attraction, for both international and domestic visitors, Victoria continues to make an important contribution to the growth of tourism within Australia. Melbourne attracts most of the international and domestic tourists but the Victorian regions are also experiencing growth. The emergence and sustained tourism growth surrounding Hallmark events (these include major sporting and cultural events) within the State has added to the promotion of Victoria to a national and international audience and has attributed to the development of major infrastructure.

Melbourne is viewed by a domestic and international audience as a culturally diverse, vibrant and green city where there are many varied activities for visitors. Lifestyle features prominently in Melbourne promotions, with shopping, dining, cafe culture and sport topping the list of things Melburnians do. Cultural activities such as performing arts, film, literature, sports and recreation, language and religious practice and activities based around conservation and enjoying the natural environment provide a basis for community expression and all share an inter-relationship with tourism.

This chapter includes information relating to Victoria's tourism and cultural activities, featuring the arts and recreation.

Tourism and the economy

Tourism is one of Australia's largest income earning industries. In 1996–97 international tourism to Australia generated overseas earnings of \$15.5 billion (up 5.1% on 1995–96). This accounted for 13.3% of Australia's total overseas earnings and 63.7% of services overseas. In 1995–96 tourism directly accounted for 7.4% of expenditure on national Gross Domestic Product and also directly accounted for 7.4% of Victoria's Gross State Product. In the same year tourism was directly responsible for the employment of 169,000 persons which represented 8.2% of Victorian employment. Victoria's share of direct tourism employment nationally (694,000) in 1995–96 was 24%.



International tourism

The number of short term overseas visitors to Australia, who specified Victoria as their main destination, increased from 438,742 in 1994 to 543,094 in 1996. Victoria's share of overseas arrivals to Australia, however, decreased from 13.1% in 1994 to 12.9% in 1995 before increasing marginally to 13.0% in 1996.

11.1 INTERNATIONAL VISITORS(a) TO AUSTRALIA BY MAIN STATE OR TERRITORY OF INTENDED STAY

	1994 no.	1995 no.	1996 no.	1996 % of Australia
New South Wales	1 468 041	1 612 407	1 775 632	42.6
Victoria	438 742	480 205	543 094	13.0
Queensland	970 631	1 110 459	1 279 706	30.7
South Australia	69 911	74 289	83 414	2.0
Western Australia	329 165	344 535	382 870	9.2
Tasmania	17 992	21 878	18 501	0.4
Northern Territory	42 240	45 164	46 591	1.1
Australian Capital Territory	25 000	28 464	30 136	0.7
Australia(b)	3 361 721	3 725 825	4 164 826	100.0

(a) Short-term arrivals who stayed less than 12 months in Australia. (b) Includes 'not stated'.

Source: Overseas Arrivals and Departures, Australia (Cat. no. 3401.0); ABS unpublished data.

In 1996, the major source of international visitors to Australia who specified their main State of intended stay as Victoria was New Zealand with 19.3% of the State visitor total. This was followed by the United Kingdom and Ireland with 10.7%, the USA with 9.9% and Japan 8.5%.

11.2 VICTORIA AS MAIN STATE OF INTENDED STAY BY INTERNATIONAL VISITORS(a) BY COUNTRY OF RESIDENCE

Country of residence	1994	1995	1996	Percentage 1996 %	Percentage change 1994 to 1996 %
New Zealand	69 672	86 089	105 057	19.3	50.8
UK and Ireland	55 554	55 470	58 199	10.7	4.8
Germany, Fed Rep	19 963	18 324	18 113	3.3	-9.3
Indonesia	16 529	20 078	26 902	5.0	62.8
Malaysia	18 194	19 466	22 951	4.2	26.1
Singapore	21 670	23 974	28 474	5.2	31.4
Thailand	16 832	14 780	16 980	3.1	0.9
Hong Kong	22 349	19 650	22 504	4.1	0.7
Japan	38 958	38 769	46 039	8.5	18.2
Taiwan	17 824	18 044	16 201	3.0	-9.1
USA	45 138	51 449	53 934	9.9	19.5
Other countries	96 059	114 022	127 740	23.5	13.2
All countries	438 742	480 205	543 094	100.0	23.8

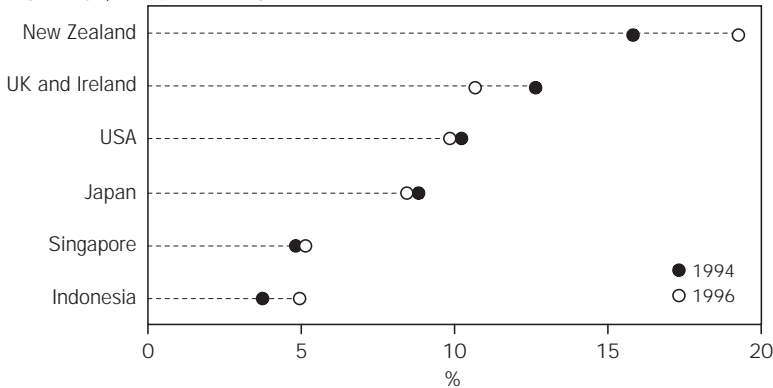
(a) Short-term arrivals who stayed less than 12 months in Australia.

Source: Overseas Arrivals and Departures, Australia (Cat. no. 3401.0); ABS unpublished data.

From 1994 to 1996, the most significant percentage growth in visitors to Victoria came from Indonesia with a 62.8% increase, followed by New Zealand and Singapore with increases of 50.8% and 31.4% respectively. For Victoria the growth in visitor arrivals over this period was 23.8%, compared with 23.9% for Australia.

Holidaying was the most common reason for overseas visitors arriving in Australia with Victoria as the main destination. The proportion of visitors nominating 'holiday' increased slightly to 41.2% in 1996 from 40.9% in 1995 but this was still much lower than the 46% recorded in 1994. The proportion of visitors who nominated 'visiting friends/relatives' and 'business' accounted for 28.7% and 15.4 % respectively for 1996.

PROPORTION OF INTERNATIONAL VISITORS TO VICTORIA(a) BY COUNTRY OF RESIDENCE, 1994 AND 1996



(a) Main State of intended stay.
Source: Overseas Arrivals and Departures, Australia, Unpublished data.

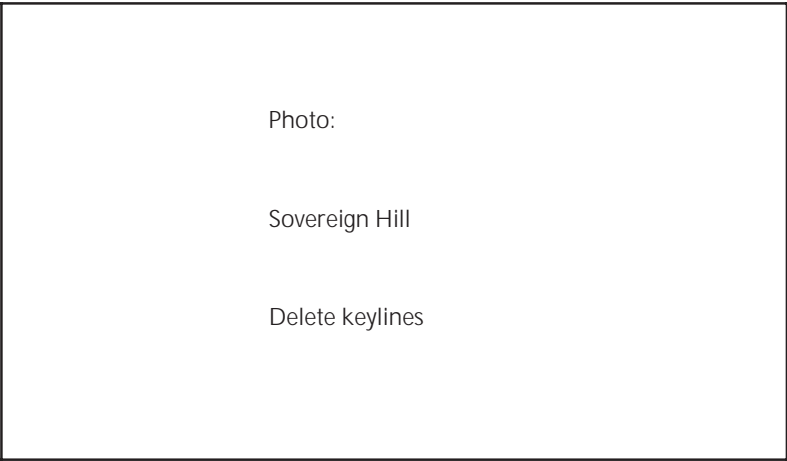
11.3 VICTORIA AS MAIN STATE OF INTENDED STAY BY INTERNATIONAL VISITORS(a) BY REASON FOR JOURNEY

Reason for journey	1994	1995	1996
	NUMBER		
Holiday	201 638	196 210	223 503
Visiting friends	120 050	142 435	156 012
Business	66 291	74 776	83 516
Other	50 763	66 784	80 063
Total	438 742	480 205	543 094
	%		
Holiday	46.0	40.9	41.2
Visiting friends	27.4	29.7	28.7
Business	15.1	15.6	15.4
Other	11.6	13.9	14.7
Total	100.0	100.0	100.0

(a) Short-term arrivals who stayed less than 12 months in Australia.
Source: Overseas Arrivals and Departures, Australia (Cat. no. 3401.0); ABS unpublished data.

Tourist attractions

During 1996, 90% of all overseas tourists to Victoria visited Melbourne. The most popular attractions were Melbourne for shopping and the Queen Victoria Market (71% and 42% respectively).



11.4 VISITORS TO VICTORIA, BY ATTRACTIONS VISITED

Places visited	1994 %	1995 %	1996 %
Melbourne	92.0	92.0	90.0
Melbourne shopping	72.0	73.0	71.0
Royal Botanic Gardens	23.0	25.0	27.0
Queen Victoria Market	40.0	42.0	45.0
Phillip Island	31.0	29.0	27.0
Captain Cook's Cottage/Fitzroy Gardens	25.0	24.0	23.0
Victorian Arts Centre	14.0	13.0	13.0
National Gallery of Victoria	12.0	14.0	15.0
Melbourne Zoo	15.0	15.0	13.0
Museum of Victoria	15.0	14.0	15.0
Melbourne Festival/Crafts	8.0	9.0	11.0
Sovereign Hill at Ballarat	13.0	10.0	11.0
Healesville Sanctuary	9.0	9.0	7.0
Southgate	16.0	20.0	21.0
The Twelve Apostles	16.0	14.0	17.0
Rialto Observation Deck	n.a.	15.0	18.0
Crown Casino	n.a.	15.0	16.0
Wineries	7.0	7.0	9.0
Melbourne Cricket Ground	n.a.	9.0	8.0
Scienceworks	1.0	2.0	2.0
Total visitors ('000)	854.8	922.6	—

(a) Percentages may add to more than 100% as visitors may have visited more than one attraction.

Source: Bureau of Tourism Research, International Visitor Survey.

Visitor expenditure

Average expenditure per person on items purchased in Australia or pre-paid (excluding package tours and pre-paid international airlines) by overseas visitors in 1996 was \$1,934 (ranging from \$1,140 for New Zealanders to \$3,117 for Indonesians). Average expenditure per night ranged from \$48 for visitors from the United Kingdom and Ireland to \$131 for visitors from Japan. (Source—BTR IVS, 1996.)

Melbourne

Melbourne hosted a number of major events which appealed to both domestic and overseas visitors. The following is based on information prepared by Tourism Victoria.

Melbourne's ability to handle events is supported by a range of venues accommodating up to 100,000 visitors with over 18,000 rooms within a five kilometre radius of the city. Melbourne also has a fully integrated domestic and international airport and a comprehensive transport system.

The Melbourne International Festival of the Arts is held over sixteen days in October. It is a festival of opera, theatre, film, dance, music, and visual arts. Melbourne comes alive as a range of innovative and artistically rewarding performances from around the world are showcased in venues throughout the city.

The Melbourne International Flower and Garden Show is Australia's largest Ornamental Horticulture presentation. It is held annually within the Carlton Gardens and the historic Exhibition Building. Highlights of the 1997 event included the Great Hall of Flowers, the Garden Sculpture Gallery, the Florist Windows of the World, and international landscape displays from Boston and Tianjin. Over 300 exhibits made up the largest show of its kind in the southern hemisphere.

The annual Melbourne International Comedy Festival, along with Montreal and Edinburgh, is one of the largest comedy festivals in the world. The festival showcases a diversity of local, national and international talent.

The Australian Grand Prix, opening round of the FIA Formula One World Championships, is Australia's premier motor sport event. An annual event, the Grand Prix was hosted for the first time by Melbourne in March 1996 at the redeveloped Albert Park circuit. Media coverage ensures extensive world wide coverage to over 120 countries reaching up to 500 million viewers.

The Australian Open, held at Melbourne Park for two weeks each January, attracts many tennis enthusiasts both from within Australia and overseas. It is a Grand Slam partner to the French Open, Wimbledon and the US Open. The 1997 Australian Open recorded a total of 391,504 attendances. 11.8% of these attendances came from overseas and 15.3% from interstate. The contribution to the Victorian economy was estimated at \$82.6 million.

The Spring Racing Carnival, held in Victoria during October and November each year, is recognised as a premier horse racing event that includes some of the most important races in the international racing calendar. The main event of the Carnival is the running of the Melbourne Cup on the first Tuesday in November. The Carnival also includes events covering the arts, culture, fashion, entertainment and sports.

In 1997 Victoria hosted the 500cc Motorcycle Grand Prix at Phillip Island for the first time since 1991 when the race was transferred to New South Wales. The Victorian Government has signed a five year contract to host the event from 1997 which is estimated to generate over \$60 million a year for Victoria.

The Australian International Airshow and Aerospace Expo held every second year at Avalon Airport is the biggest aviation and aero space event in the Southern Hemisphere. The event combines a trade show held over four days and an air show on the last two days. The 1997 Airshow recorded 171,168 attendances and an estimated contribution to the Victorian economy of \$63 million.

The Melbourne Moomba Festival is an annual event which focuses on the Yarra River, the adjacent Alexandra Gardens and the City centre. It is one of Australia's largest outdoor free festivals which is popular with persons of all ages. In 1996 the festival attracted 1,320,000 people, of whom 2% were from overseas and 4% from interstate.

The Australian Football League Grand Final is held at the Melbourne Cricket Ground (MCG) each year on the last Saturday in September and attracts more than 90,000 fans to the MCG. Television coverage extends to overseas countries.

The Melbourne Boxing Day Test Match is held at the historic Melbourne Cricket Ground and is one of the great traditions of sport in Victoria and Australia.

Victorian residents as overseas visitors

During 1995 there were 593,180 short term departures of Victorian residents, an increase of 9.4% over 1994. The five main destinations for Victorian travellers were the USA (13.3%), New Zealand (12.6%), UK and Ireland (10.7%), Indonesia (7.8%) and Hong Kong (6.1%).

11.5 SHORT-TERM DEPARTURES BY VICTORIAN RESIDENTS(a)

Country of stay	1994 no.	1995 no.	1996 no.	1996 %
USA	71 240	79 164	81 578	12.7
New Zealand	72 164	74 451	86 568	13.5
UK and Ireland	57 153	63 491	67 117	10.5
Indonesia	40 105	46 369	53 526	8.3
Hong Kong	27 355	35 934	37 163	5.8
Fiji	21 001	15 759	15 695	2.4
Malaysia	21 239	23 470	25 978	4.0
Thailand	16 832	17 320	19 476	3.0
Viet Nam	11 875	14 364	15 617	2.4
Singapore	17 365	19 547	20 706	3.2
Greece	12 379	15 070	12 765	1.9
Italy	14 735	15 492	20 347	3.2
China	7 622	15 300	16 013	2.5
Other	150 977	157 449	168 807	26.3
Total	542 042	593 180	641 646	100.0

(a) Short-term departures who intended to stay overseas less than 12 months.

Source: ABS unpublished data.

Domestic tourism

During 1995–96 interstate and intrastate visitors accounted for 76% of total visitor nights compared with 24% of visitor nights for international tourists. Domestic tourism is defined as ‘travel by Australian residents involving a stay away from home for one or more nights and requiring a journey of at least 40 kilometres from home, undertaken for any reason’. (See references for note on data comparability at the end of this chapter.)

11.6 INTERNATIONAL AND DOMESTIC TOURISM: A COMPARISON OF VISITOR NIGHTS(a), 1995–96

Source of visitor	Victoria		Australia	
	'000	% of total	'000	% of total
International	(b)15 326	24.0	90 152	26.0
Domestic–	48 430	76.0	(c)256 472	74.0
Interstate	15 453	31.9	100 506	39.2
Intrastate	32 977	68.1	153 208	59.7
Total	63 756	100.0	346 624	100.0

(a) The international figures relate to visitors 15 years and over and domestic figures relate to the Australian population aged 14 years and over. (b) Derived estimate based on Bureau of Tourism Research data. (c) Includes figures for NT and ACT which are not separately recorded for Interstate and Intrastate visitors. Also includes total nights where destination was not stated.

Source: Bureau of Tourism Research, Canberra; Domestic Tourism Monitor 1995–96; and International Visitor Survey, 1996.

Total domestic visitor nights spent in Victoria by Australian residents increased from 47,270 in 1994–95 to 48,430 in 1995–96, a rise of 2.5%. In terms of visitor nights, Victorian tourism accounted for 18.9% of the total Australian market compared with 31.2% for New South Wales and 24.8% for Queensland. The major part of domestic tourism (68.1%) in Victoria was accounted for by intrastate visitor nights. This compared with 59.7% for Australia.

During 1995–96, the most common reasons for domestic travel in Victoria were ‘pleasure and holiday’ and ‘visiting friends and relatives’ which accounted for 41.6% and 30.3% respectively of all visitor nights. For interstate travellers the main purpose of visiting Victoria was ‘visiting friends and relatives’ (37.7% of visitor nights).

11.7 DOMESTIC VISITOR NIGHTS, BY PRIMARY PURPOSE OF TRIP, VICTORIA 1995-96

	Pleasure/ holiday '000	Visiting friends/ relatives '000	Business '000	Total(a) '000
Interstate	4 823	5 825	2 502	15 453
Intrastate	15 323	8 832	3 081	32 977
Total nights	20 146	14 657	5 583	48 430

(a) Includes 'not stated' and 'other purposes', not separately recorded.

Source: Bureau of Tourism Research, Domestic Tourism Monitor, 1995-96.

Profile of travel to Victorian regions

During 1995 there were 15 million overnight visitors (international, interstate and intrastate) to Victoria. Of these, over 5 million travelled to the Melbourne region, 2.2 million visited the Great Ocean Road region and 1.7 million travelled to the Goldfields region. Overnight trip expenditure in Victoria totalled \$3.4 billion during 1995. A large proportion of this (61.6%) was spent in the Melbourne region. (See references for note on data comparability at the end of this chapter.)

11.8 TOURISM IN VICTORIAN REGIONS, 1995

Victorian regions(a)	Visitors '000	Origin of visitor				Expenditure \$m
		Intrastate %	Interstate %	International %	Total %	
Melbourne (1, 2)	5 170	43.0	41.0	17.0	100.0	2 122
Oasis (10, 11)	919	67.0	31.0	2.0	100.0	138
Great Ocean Road (7, 8)	2 211	87.0	12.0	2.0	100.0	242
Grampians (9)	575	75.0	24.0	1.0	100.0	79
Goldfields (6, 12, 13)	1 672	80.0	17.0	3.0	100.0	186
Goulburn, Central Murray (14)	1 282	86.0	13.0	1.0	100.0	141
Legends, Wine & High Country (5, 15, 16)	1 456	88.0	12.0	1.0	100.0	219
Lakes (17)	894	88.0	10.0	2.0	100.0	134
Gippsland (18)	937	93.0	6.0	2.0	100.0	69
Mornington Peninsula & Phillip Island (3, 4, 7)	1 236	91.0	9.0	1.0	100.0	119
Total Victoria(b)	14 956	74.0	20.0	6.0	100.0	3 447

(a) The numbers shown in brackets adjacent to each region refer to the 18 sub-regions listed on the map overleaf. (b) Regional figures do not add to Victorian total because visitors are counted to each region visited.

Source: Tourism Victoria, Victorian Regional Travel and Tourism Survey.

TOURISM IN VICTORIAN REGIONS

Sub Regions

- 1 Melbourne A

2 Melbourne B

3 Mornington Peninsula

4 Phillip Island

5 Yarra Valley

6 Spa Country

7 Geelong/East Barwon

8 Western

9 Grampians
- 10 Wimmera

11 Murray Mallee

12 Bendigo Loddon

13 Bendigo & Surrounds

14 Goulburn/Central Murray

15 Murray/North East

16 Snowfields

17 Lakes

18 Gippsland

(VICTORIAN TOURIST REGIONS MAP, REDUCED TO 90%
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Tourist accommodation

At 30 June 1997 Victoria accounted for 20.9% of the number of licensed hotels, motels and guest houses in Australia with takings of \$612 million for the 1996–97 financial year. Victoria also accounted for 22.1% of site nights occupied in caravan parks in Australia during 1996–97.

During 1996–97 the growth in demand for hotel, motel and guest house accommodation in Victoria was almost matched by the growth in supply. The 1.2% increase in the number of room nights occupied was only marginally above the 1.1% increase in the number of guest rooms available. As a result the room occupancy rate increased only slightly from 54.8% in 1996 to 55.3% in 1997.

Of the 30,325 guest rooms with facilities in Victoria at 30 June 1997, 49.3% were within the Melbourne Statistical Division (MSD). Room occupancy rates in the MSD for each quarter in 1996–97 ranged from 13.5 to 15.0 percentage points above the State average with takings from accommodation accounting for 73.9% of the Victorian total in 1996–97.

Regional tourist accommodation

11.9 TOURIST ACCOMMODATION, VICTORIA

Particulars	Unit	Year ended 30 June			1997 % of Australia
		1995	1996	1997	
LICENSED HOTELS, MOTELS, AND GUEST HOUSES					
Establishments (qtr ended June)	no.	1 016	1 021	1 012	20.9
Guest Rooms available (qtr ended June)	no.	29 543	30 007	30 325	17.2
Room nights occupied	'000	5 655.4	5 967.2	6 039	16.4
Room occupancy rate	%	52.1	54.8	55.3	..
Takings from accommodation	\$'000	493 276	569 214	612 485	16.9
CARAVAN PARKS					
Establishments (qtr ended June)	no.	598	599	595	22.1
Vans, sites, cabins available (qtr ended June)	no.	66 977	67 641	66 848	23.2
Site nights occupied	'000	10 028.7	10 209.8	10 314.7	22.1
Site occupancy rate	%	40.9	41.3	42.1	..
Takings from accommodation	\$'000	77 373	82 674	87 452	17.4
HOLIDAY FLATS, UNITS AND HOUSES					
Flats, units & houses (qtr ended June)	no.	3 559	3 763	3 688	8.8
Unit nights occupied	'000	564	631	630	7.9
Unit occupancy rate	%	45.1	46.3	45.7	..
Takings from accommodation	\$'000	45 851	54 272	55 621	9.7
VISITOR HOSTELS					
Establishments (qtr ended June)	no.	55	56	53	10.7
Bed spaces available (qtr ended June)	no.	3 026	3 403	3 490	11.0
Bed occupancy rate	%	37.9	37.8	39.5	..
Takings from accommodation	\$'000	5 337	6 485	7 432	10.3

Source: Tourist Accommodation, Victoria (Cat. no. 8635.2).

Outside the MSD the Statistical Divisions of Goulburn (2,894) and Ovens-Murray (1,970) had the greatest number of guest rooms with facilities, accounting for 9.5% and 6.5% respectively of Victorian guest rooms available in 1996-97. With the exception of Melbourne the Barwon Statistical Division, which encompasses Geelong and the beach resorts of Point Lonsdale, Apollo Bay, Ocean Grove, Bells Beach, and Lorne, experienced the strongest seasonal peak (61.8%) in its room occupancy rate in the 1997 March quarter, which is the main period for beach resort activities.

11.10 HOTELS, MOTELS, AND GUEST HOUSES WITH FACILITIES: OPERATIONAL DETAILS BY STATISTICAL DIVISION, 1996-97

Statistical Division	Establishments(a) no.	Guest rooms no.	Room occupancy rates (quarterly)				Takings from accommodation \$'000
			Sept %	Dec no.	March no.	June no.	
Melbourne	240	14 943	65.5	71.0	74.4	67.2	452 344
Barwon	78	1 657	35.8	47.9	61.8	40.9	22 769
Western District	79	1 412	34.9	44.7	54.3	43.3	14 078
Central Highlands	59	1 225	41.8	50.8	51.4	47.6	15 796
Wimmera	50	877	36.8	45.4	46.0	42.1	8 028
Mallee	69	1 598	45.9	48.2	42.4	46.7	15 186
Loddon	58	1 012	43.7	48.8	49.2	45.9	11 792
Goulburn	141	2 894	42.9	37.9	41.5	37.0	31 208
Ovens-Murray	99	1 970	46.1	30.0	34.0	34.4	19 083
East Gippsland	77	1 448	31.7	38.6	45.8	34.9	11 860
Gippsland	62	1 289	27.1	38.7	44.8	34.9	10 343
Victoria	1 012	30 325	52.0	56.0	59.8	53.3	612 485

(a) Number of establishments and guest rooms at 30 June 1996.

Source: Tourist Accommodation, Victoria (Cat. no. 8635.2); Tourist Accommodation, Australia (Cat. no. 8635.0).

This article has been provided by Tourism Victoria.

Backpackers in Victoria 1996

Backpackers are an important segment in the international tourism market accounting for over 250,000 visitors to Australia each year. Backpackers tend to be young (18 to 30 years), well educated, have a preference for independent travel and a desire to explore new destinations. They like to socialise with other backpackers as well as interacting with locals.

Backpackers prefer to steer away from commercial attractions in favour of more active, adventurous and different experiences. Natural wonders, unspoilt scenery, excitement, friendly people and value for money are all important travel needs for the backpacker. The backpacker tends to budget on accommodation with the aim of extending the holiday experience. The real economic significance of the market stems from the long average stay of backpackers.

Visitation

Almost 250,000 backpackers travelled to Australia during 1996, representing 7% of all international arrivals in the country. 43% of all backpacker visitors to Australia visited Victoria during 1996. Backpacker visitors represent 11% of all international visitors to the State.

In total 107,900 backpackers visited Victoria during 1996. The largest source market was the UK with 25,050 backpackers visiting the State. Other large markets included Germany (13,900), USA (7,520), Japan (5,650) and Canada (4,300).

Backpackers spent 2.9 million nights in Victoria during 1996 representing 16% of all backpacker nights in Australia, up from 13% in 1993.

11.11 NUMBER OF BACKPACKER VISITORS TO VICTORIA AND AUSTRALIA BY COUNTRY OF RESIDENCE, 1996

Country	Victoria			Australia		
	Visitors no.	Nights '000	Average nights per visitor no.	Visitors no.	Nights '000	Average nights per visitor no.
New Zealand	2 870	179	62	16 740	810	48
Japan	5 650	139	25	21 330	1 172	55
Hong Kong	2 280	10	4	2 350	43	18
Singapore	1 370	6	4	3 640	103	28
Malaysia	1 670	18	11	5 270	160	30
Indonesia	830	100	121	3 420	209	61
Taiwan	700	15	21	3 440	92	27
Korea	3 680	17	5	8 580	433	50
USA	7 520	271	36	20 140	1 184	59
Canada	4 300	78	18	9 040	780	86
UK	25 050	989	39	48 700	5 966	122
Germany	13 900	339	24	26 300	1 507	57
Other	38 100	770	20	79 420	5 901	74
Total	107 920	2 931	27	248 370	18 360	74

Source: Tourism Victoria.

Length of Stay

Backpacker visitors stay considerably longer than the average international visitor. During 1996 backpackers stayed for an average 74 nights in Australia, compared to the average stay for total visitors of 24 nights. Backpackers also stayed 27 nights in Victoria on average, compared to the total average of 16 nights.

During 1996 UK backpackers stayed the longest time (on average) in Australia (122 nights) followed by backpackers from Canada (86 nights), Indonesia (61 nights) and USA (59 nights). For Victoria the longest (on

Market Share

average) staying backpacker visitors in 1996 were from Indonesia (121 nights), New Zealand (62 nights) and United Kingdom (39 nights).

During 1996, 43%(107,920 persons) of all backpackers to Australia (248,370) visited Victoria during their stay. From the various countries over half (51%) of UK backpackers stayed in Victoria, as did those from Hong Kong (97%), Germany (53%), Singapore (38%), USA (37%) and Korea (43%).

Expenditure

Backpackers spent an average of \$4,150 per trip in Australia during 1996, compared with the average trip expenditure of all visitors to Australia of \$1,310.

Backpacker visitors to Victoria spent \$1,520 on average during their stay in the State. Direct expenditure by backpackers in Victoria for the year totalled \$165.5 million. UK backpackers spent the most in Victoria during 1996 (\$43.2m) followed by Germany (\$24.2m), USA (\$18.3m) and New Zealand (\$10.2m).

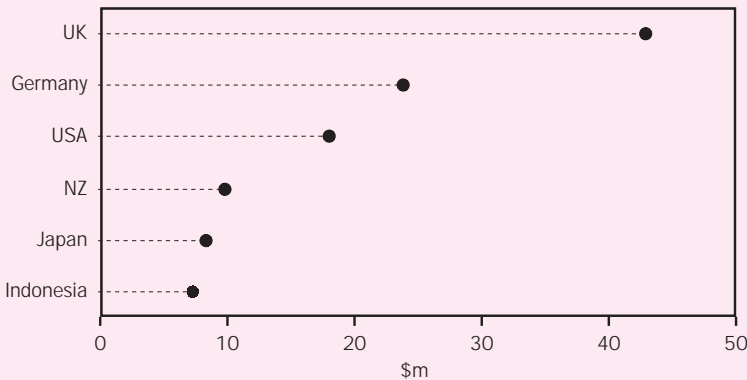
Backpackers spent most money on food, drink, accommodation, shopping and transportation. As backpackers tend to travel more widely, the expenditure is spread more evenly between urban and rural areas.

11.12 BACKPACKER VISITOR EXPENDITURE IN VICTORIA BY COUNTRY OF RESIDENCE, 1996

Country	\$m	%
China	0.45	0.3
Singapore	0.49	1.3
Hong Kong	0.61	0.4
Taiwan	0.83	0.5
Korea	1.10	0.7
Malaysia	1.24	0.7
Canada	3.32	2.0
Indonesia	7.57	4.6
Japan	8.58	5.2
New Zealand	10.18	6.2
USA	18.28	11.0
Germany	24.18	14.6
UK	43.22	26.1
Other	45.45	27.5
Total	165.50	100.0

Source: Tourism Victoria.

BACKPACKER VISITOR EXPENDITURE IN VICTORIA BY COUNTRY OF RESIDENCE, 1996



Source: Tourism Victoria.

National Estate

The preservation and use of historic sites are important aspects of cultural expression within the community. Many places in Australia have aesthetic, historic, scientific, economic or social significance for the present community and future generations. These include natural environments, historic buildings and sites of significance to Aboriginal people and are collectively known as the 'National Estate'.

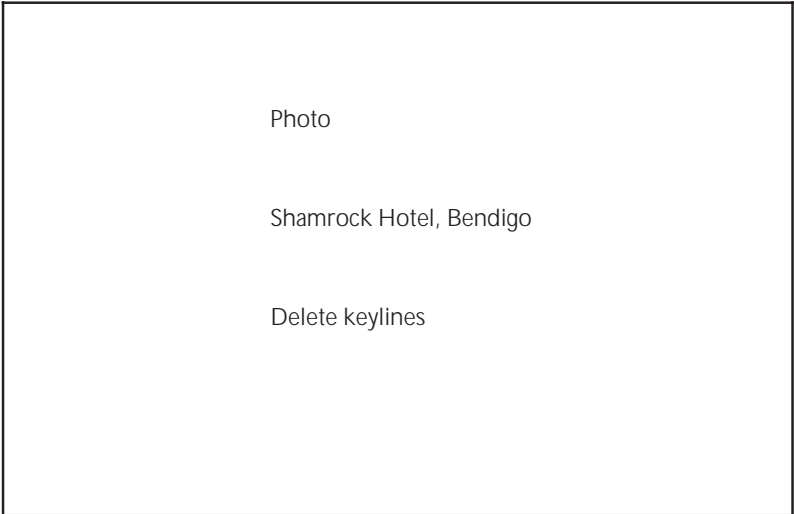
The Australian Heritage Commission is the peak advisory body to the Commonwealth Government regarding the identification and conservation of the National Estate. The Commission is responsible for maintaining the Register of the National Estate. The register lists places identified as being of cultural and natural importance which should be conserved for present and future generations.

11.13 REGISTER OF THE NATIONAL ESTATE, 30 JUNE 1997

State/Territory	Aboriginal	Historic	Natural	Total	%
New South Wales	214	2 857	432	3 503	29.1
Victoria	104	2 240	205	2 549	21.2
Queensland	146	721	266	1 133	9.4
Western Australia	74	885	232	1 191	9.9
South Australia	143	851	372	1 366	11.3
Tasmania	65	1 176	232	1 473	12.2
Northern Territory	88	108	51	247	2.1
Australian Capital Territory / Jervis Bay	25	138	28	191	1.6
External territories	—	16	16	32	0.3
Interim list (all States/Territories)	29	132	198	359	3.0
Total	888	9 124	2 032	12 044	100.0

Source: Australian Heritage Commission, Annual Report.

Perceptions of what is of heritage value change over time. In the past architecture and buildings were given pre-eminence as cultural icons. Now Australian heritage is increasingly perceived as a record of our past, in all its facets, which assists us as a nation to understand our identity – where we have come from and where our future lies. The register reflects this transition in perception. At 30 June 1997 historic sites (a large percentage of which were buildings) comprised 76% of the registered sites of the National Estate, compared with 7% for Aboriginal sites and 17% for Natural sites. As public awareness changes this balance is likely to change.



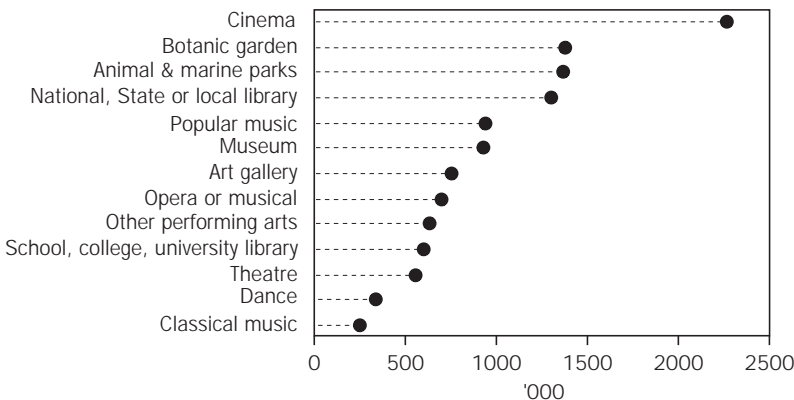
Culture and recreation

At the 30 June 1997 over 21% of listings on the Register of the National Estate were in Victoria. The majority of these were places of historical significance and included 870 residential buildings, 177 churches or other religious places and 210 places related to farming and grazing. Of the 104 aboriginal sites listed on the register there were 17 aboriginal shell middens, 17 aboriginal art sites and 13 aboriginal burial sites.

Over 10% of people's time is spent on social and active leisure activities with a further 13% of time spent in passive leisure during 1994-95.

The attendance of Victorians at selected cultural venues was generally comparable to the Australian average, the major exception being the higher participation rate for attendance at the Melbourne zoo.

PERSONS ATTENDING CULTURAL VENUES, MARCH 1994 - MARCH 1995, VICTORIA



Source: Attendance at Selected Cultural Venues (Cat. no. 4114.0).

11.14 PERSONS ATTENDING CULTURAL VENUES, VICTORIA AND AUSTRALIA MARCH 1994 - MARCH 1995

Venue / activity	Victoria		Australia	
	Persons attending '000	Participation rate(a) %	Persons attending '000	Participation rate %
Art gallery	756.4	21.3	3 134.1	22.3
Museum	922.8	26.0	3 905.6	27.8
Animal & marine parks	1 354.1	38.2	4 966.0	35.3
Zoo	996.3	28.1	3 123.9	22.2
Botanic garden	1 362.4	38.5	5 410.5	38.5
National, State, or local library	1 288.7	36.4	5 403.1	38.4
School, college or university library	611.6	17.3	2 402.1	17.1
Popular music	932.4	26.3	3 790.7	26.9
Classical music	261.6	7.4	1 081.3	7.7
Theatre	564.7	15.9	2 336.3	16.6
Dance	351.4	9.9	1 407.5	10.0
Children's dance	94.6	2.7	417.7	3.0
Opera or musical	705.4	19.9	2 722.1	19.3
Opera only	79.2	2.2	327.3	2.3
Musical only	538.9	15.2	2 087.7	14.8
Both opera & musical	87.3	2.5	307.0	2.2
Other performing arts	639.3	18.0	2 634.4	18.7
Circus	275.6	7.8	1 132.8	8.1
Cinema	2 220.2	62.7	8 733.8	62.1

(a) The participation rate is the number of people who attended a venue at least once during the year, expressed as a percentage of the civilian population in the same population group (e.g. age group).

Source: Attendance at Selected Cultural Venues (Cat. no. 4114.0).

The participation rate can be used to compare the level of involvement in cultural activities of different population groups. In Victoria the highest participation rate was for cinema attendance at 63%, followed by Botanic Gardens (39%), Animal and marine parks (38%) and Libraries (National, State and local) (36%).

Generally participation rates were highest for those in the 15–44 year age groups, declining with age from 45 years. Two exceptions were attendance at Popular music venues which peaked at a participation rate of 49% for 18–24 year olds and Opera or musical venues which peaked at a participation rate of 26% for 45–54 year olds. Generally persons aged 65 years and over participated at significantly lower rates than people in other age groups.

11.15 PERSONS ATTENDING CULTURAL VENUES BY AGE, VICTORIA, MARCH 1994–MARCH 1995

	Age group (years)							
Venue/activity	15–17	18–24	25–34	35–44	45–54	55–64	65 and over	Total
PERSONS ATTENDING								
Art gallery	47.5	103.0	136.8	156.3	131.6	89.2	92.0	756.4
Museum	54.4	124.1	184.8	228.0	153.9	87.9	89.7	922.8
Animal & marine parks	84.0	223.9	351.6	300.3	181.3	116.3	96.8	1 354.1
Botanic garden	71.3	211.7	292.1	290.9	207.5	133.6	155.3	1 362.4
National, State or local library	96.5	199.8	249.9	288.1	186.5	112.2	155.8	1 288.7
Popular music	55.5	240.6	240.2	187.1	114.1	59.0	35.9	932.4
Classical music	*5.8	27.0	35.3	61.5	53.4	42.2	36.4	261.6
Theatre	38.3	71.5	134.3	117.1	99.8	60.8	42.9	564.7
Dance	20.7	51.9	66.9	81.3	64.8	34.6	31.2	351.4
Opera or musical	32.2	94.6	139.4	139.7	141.3	78.0	90.2	705.4
Other performing arts	37.8	133.9	188.8	141.6	76.8	32.1	28.2	639.3
Cinema	163.0	441.9	523.7	449.9	315.3	156.9	169.6	2 220.2
PARTICIPATION RATES								
Art gallery	26.6	20.8	19.3	23.1	24.0	23.3	16.7	21.3
Museum	30.4	25.0	26.0	33.7	28.1	23.0	16.3	26.0
Animal & marine parks	46.9	45.1	49.5	44.4	33.1	30.4	17.6	38.2
Botanic garden	39.8	42.7	41.1	43.0	37.9	34.9	28.2	38.5
National, State or local library	53.9	40.3	35.2	42.6	34.1	29.3	28.3	36.4
Popular music	31.0	48.5	33.8	27.7	20.8	15.4	6.5	26.3
Classical music	*3.2	5.4	5.0	9.1	9.8	11.0	6.6	7.4
Theatre	21.4	14.4	18.9	17.3	18.2	15.9	7.8	15.9
Dance	11.6	10.5	9.4	12.0	11.8	9.0	5.7	9.9
Opera or musical	18.0	19.1	18.2	20.7	25.8	20.4	16.4	19.9
Other performing arts	21.1	27.0	26.6	20.9	14.0	8.4	5.1	18.0
Cinema	91.1	89.1	73.7	66.5	57.6	41.0	30.8	62.7

Source: Attendance at Selected Cultural Venues (Cat. no. 4114.0).

Employment

In 1996 there were 39,982 persons working in selected cultural occupations in Victoria of which the largest proportion worked as designers and illustrators (7,136 persons or 17.8%) followed by people working as journalists and related professionals (3,490 persons or 8.7%) and private teachers (music, art, drama, dance) (2,760 persons or 6.9%). Close to two thirds (63%) worked full time (35 hours or more per week) in their occupations; 18.8% worked 16–34 hours and 17% less than 16 hours per week.

Of those working in cultural occupations 14% were aged 15 to 24 years.

In terms of income 24.7% of people employed in selected cultural occupations earned less than \$15,599 per year whilst 36.8% earned from \$15,600 to \$31,199

per year and 37% earned more than \$31,200 per year. Occupations with the highest proportion of workers earning more than \$31,200 per year included media producers and artistic directors (67.8%), architects and landscape architects (60.1%) and journalists and related professionals (59.6%). By contrast occupations with the highest proportion of workers earning less than \$15,599 included private music, art, drama and dance teachers) (55.5%) and visual arts and crafts professionals (49.0%).

11.16 CHARACTERISTICS OF PERSONS WORKING IN SELECTED CULTURAL OCCUPATIONS, VICTORIA, 1996

Occupation	Hours worked per week				Individual annual income			Total employed persons
	Youth aged 15-24 years no.	Less than 16 hours no.	16-34 hours no.	35 plus hours no.	Less than \$15,599 no.	\$15,600 to \$31,199 no.	\$32,000 and over no.	
Designers & illustrators	1 259	523	926	5 607	1 085	2 885	3 055	7 136
Journalists & related professionals	444	381	477	2 601	361	1 008	2 080	3 490
Private teachers (music, art, drama, dance)	463	1 383	787	554	1 532	901	290	2 760
Architects & landscape architects	118	152	253	2 274	249	795	1 626	2 705
Visual arts & crafts professionals	240	384	571	1 559	1 254	961	297	2 558
Librarians	126	306	566	1 514	323	813	1 249	2 403
Performing arts support workers	425	250	367	1 318	334	892	729	1 950
Library technicians	168	241	620	1 008	463	1 217	179	1 877
Musicians & related professionals	272	702	564	532	653	562	517	1 770
Photographers	197	217	293	1 124	443	669	504	1 653
Library assistants	364	465	413	649	674	763	86	1 539
Architectural associates	221	94	172	1 149	200	560	649	1 423
Film, television, radio & stage directors	103	100	165	903	162	338	666	1 188
Media producers & artistic directors	96	55	97	996	71	277	781	1 152
Actors, dancers & related professionals	296	403	274	316	395	377	228	1 024
Arts / related professionals	73	115	203	589	283	317	301	923
Ticket collector or usher	442	520	151	116	604	153	31	796
Other cultural	463	516	655	2 359	779	1 241	1 524	3 635
Total cultural	5 770	6 807	7 554	25 168	9 865	14 729	14 792	39 982

Source: Census of Population and Housing, unpublished data.

Cultural funding

Governments in Australia provide considerable financial support to organisations in the culture industry across a diverse range of arts and cultural activities. Government funding in Australia was \$3,052 million in 1994-95 and 3,195 million in 1995-96. In 1995-96 \$1,372 million (42.9%) was contributed by the Commonwealth government, \$1,217.6 million (38.1%) by State/Territory Governments and \$605.2 million (18.9%) from Local Governments. Total cultural funding in Australia in 1995-96 represented \$176 per head of mean population.

Of the \$1,217.6 million cultural funding by States and Territories in 1995-96, Victoria accounted for \$225.1 million (18.5%) compared with \$382.2 million (31.4%) for NSW and \$230.1 million (18.9%) for Queensland. In Victoria \$136.8 million (60.8%) of State Government cultural funding in 1995-96 was for 'cultural facilities and services', \$69.3 million (30.8%) for 'recreational facilities

and services,' \$13.2 million (5.9%) for 'other recreation and culture' and \$5.8 million (2.6%) for 'broadcasting and film'.

11.17 CULTURAL FUNDING BY VICTORIAN STATE GOVERNMENT, 1995–96

Particulars	\$m
Recreational facilities & services	69.3
National parks & wildlife services	69.3
Cultural facilities & services	136.8
Zoological & botanic gardens	9.4
Libraries & archives	55.4
Literature & publishing	0.5
Museums	25.6
Art galleries	10.0
Visual arts/crafts & photography	1.4
Performing arts venues & arts centres	17.3
Music (excluding opera)	1.9
Other performing arts	6.8
Cultural heritage	8.5
Broadcasting & film	5.8
Film & video	5.8
Other recreation & culture	13.2
Administration of culture	6.5
Community cultural services	1.4
Other culture	5.3
Total	225.1

Source: Census of Population and Housing, 1996

Total cultural funding by local government in Victoria in 1995–96 was \$167.7 million. The largest category of cultural funding for Victorian Local Government was libraries and archives which accounted for 43% of total funding. The next most significant category was public halls and civic centres accounting for 36.3% of total funding.

11.18 CULTURAL FUNDING BY LOCAL GOVERNMENT, VICTORIA, 1995–96

Category	\$m	%
Recreational facilities & services	61.7	36.8
Public halls & civic centres	60.8	36.3
Cultural facilities & services	96.0	57.2
Libraries & archives	72.1	43.0
Other	23.9	14.3
Other recreation & culture(a)	10.0	6.0
Total	167.7	100.0

(a) Includes broadcasting and film.

Source: Cultural Funding, Australia (Cat. no. 4183.0) unpublished data.

Sports involvement

In 1993, 32% of persons aged 15 and over had either paid or unpaid involvement with sport (40% of males and 25% of females). Victoria had slightly higher participation than New South Wales (31.5%) and Queensland (31.4%), but lower than all other States and Territories.

11.19 PERSONS WITH PAID AND UNPAID INVOLVEMENT IN SPORT(a), VICTORIA, 1997

	Paid involvement \$'000	Unpaid involvement only \$'000	Paid & unpaid involvement \$'000	All sport involvement \$'000	No involvement \$'000	Total \$'000	Participation rate %
Males	27.0	662.8	22.5	712.2	1 060.6	1 772.9	40.2
Females	16.2	425.5	17.3	459.0	1 392.2	1 851.1	24.8
Persons	43.1	1 088.3	39.8	1 171.2	2 452.8	3 624.0	32.3

(a) 12 months ended March 1997.

Source: *Involvement in Sport, March 1997 (Cat. no. 6285.0)*.

Sports industries

In 1994–95 the three sports industries, 'horse and dog racing,' 'sports grounds and facilities' and 'sports and services to sports', made important contributions to the Victorian economy. The industries provided employment for 17,713 persons and generated gross income of \$798.4m. In terms of number of businesses, employment and gross income, Victoria contributed the largest proportion of all States, with 27%, 30% and 32% respectively. By way of comparison Victoria contributed 25% to the Australian estimated resident population.

11.20 SPORTS INDUSTRIES, VICTORIA, 1994–95

Sports industry	Businesses		Employment		Wages and salaries		Gross income	
	no.	%	no.	%	\$m	%	\$m	%
Horse & dog racing	249	18.0	3 983	22.5	42.5	25.2	242.3	30.3
Sports grounds & facilities	430	31.1	6 802	38.4	55.3	32.8	242.9	30.4
Sports & services to sports	703	50.9	6 928	39.1	71.1	42.1	313.3	39.2
Total	1 382	100.0	17 713	100.0	168.8	100.0	798.4	100.0
Victoria as percentage of Australia		27.3		30.3		28.0		31.7

Source: *Sports Industries Australia 1994–95 (Cat. no. 8686.0)*.

During the twelve months ended June 1996, 31% of Victorians aged 15 years and over participated in organised sport and physical activities (1,080,800 people). Males had a higher participation rate (35%) than females (28%) in Victoria which was similar across Australia with 34% and 27% respectively. Each participant spent an average of \$645 during 1995-96 on sport and physical activities.

11.21 PARTICIPATION IN SPORT, VICTORIA AND AUSTRALIA, 1996

	Persons participating		Participation rate	
	'000	'000	%	%
Males	593.8	2 314.2	34.7	34.0
Females	487.0	1 910.0	27.6	27.4
Total	1 080.8	4 224.2	31.1	30.7

Source: *Participation in Sport and Physical Activities, Australia (Cat. no. 4177.0)*.

Recreational fishing

During 1996, 841,000 Victorians, or 23.3% of the State's population aged fourteen years of age and over, fished at least once. Of these persons: 70% were male, 63% were residents of Melbourne, 54% were aged 25–49 years and 65% were in full-time or part-time employment. In terms of frequency 460,000 Victorians, or 10.6% of the State's population, fished at least once each quarter during 1996. (Source: A Report on the Tracking Survey on Fishing in Victoria 1996—general Report, Natural resources and Environment.)

Photo:

Squeaky Beach (The Prom.) with fisherman

Delete keylines

Books

Reading and literature are popular recreational and cultural pursuits in Australia. Book publishing organisations within Australia provide an important service to the reading public. In 1995–96 the 214 businesses predominantly engaged in book publishing in Australia sold \$561.1 million of Australian titles out of total book sales of \$950 million. These organisation earned \$80.3 million through export of books, sold 130.6 million books and published 6,841 new Australian titles. There were 49.2 million books imported by the publishing businesses and these sold for \$384 million.

At the end of June 1996 there were 66 publishing businesses with their head office in Victoria that accounted for \$343.2 (36.1%) of the total book sales (\$950 million) generated by all book publishing organisations in Australia.

Music

At the 30 June 1996 there were 541 businesses in Australia which were active in the field of music. The businesses comprised record companies, distributors, manufacturers of recorded music, music publishers and sound recording studios. The businesses employed 3,886 persons, of which 2,324 (60%) were employed by record companies and distributors and 800 (21%) by sound recording studios.

During the same period 26% of Australian 'record companies and distributors' were based in Victoria which accounted for 17% of total employment in the industry in Australia. The comparable figures for sound recording studios were 28% and 23%.

REFERENCES

Data sources

The tourism statistics contained in this chapter are based on information from the Australian Bureau of Statistics, the Bureau of Tourism Research and Tourism Victoria. Care should be taken in comparing data from these sources because of differing survey methodologies, such as differences in population age groups, for example, BTR international visitor data relates to people aged 15 years and over; BTR domestic tourism relates to the population aged 14 years and over; and Tourism Victoria's 'Victorian Regional Travel and Tourism Survey' relates

to visitors of all age groups and includes both domestic and international tourists.

The Bureau of Tourism Research International Visitor Survey (IVS) is the major source of information on the travel patterns of international visitors to Australia. It provides a profile of the characteristics, travel behaviour and expenditure of international visitors. The IVS was first conducted in 1969 and then intermittently throughout the 1970s. A survey has been conducted annually since 1981, with the exceptions of 1982 and 1987.

The Bureau of Tourism Research Domestic Tourism Monitor (DTM) has been conducted since 1978–79. The DTM is designed to provide estimates of the volume of domestic travel within each State and Territory, and information about the characteristics and behaviour of domestic travellers to enable monitoring of changes in these features over time.

The Victorian Regional Travel and Tourism Survey conducted by Tourism Victoria presents an overall picture of regional tourism throughout the State. Information is collected on overnight and day trips taken within Victoria including intrastate, interstate and international visitors. Survey information includes: visitors, length of stay, purpose of trip, first/previous visit, accommodation, activities, visitor nights, origin of visitor, demographics, transport used, satisfaction levels and expenditure.

ABS sources

1996 Census of Population and Housing

Overseas Arrivals and Departures, Australia (Cat. no. 3401.0)

Tourist Accommodation, Victoria (Cat. no. 8635.2)

Tourist Accommodation, Australia (Cat. no. 8635.0)

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Cultural Funding, Australia (Cat. no. 4183.0), *Unpublished data*

Attendance at Selected Cultural Venues (Cat. no. 4114.0)

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Involvement in Sport, March 1997 (Cat. no. 6285.0)

Participation in Sport and Physical Activities Australia (Cat. no. 4177.0)

Sports Industries Australia 1994–95 (Cat. no. 8686.0)

Cultural Trends in Australia (Cat. no. 1363.0), *Unpublished data*

A Report on the Tracking Survey on Fishing in Victoria 1996—General Report, Natural Resources and Environment.

Non-ABS sources

Australian Heritage Commission, 'Annual Report'

Bureau of Tourism Research, Domestic Tourism Monitor (BTR DTM)

Bureau of Tourism Research, International Visitors Survey (BTR IVS)

Tourism Victoria, Victorian Regional Travel and Tourism Survey
