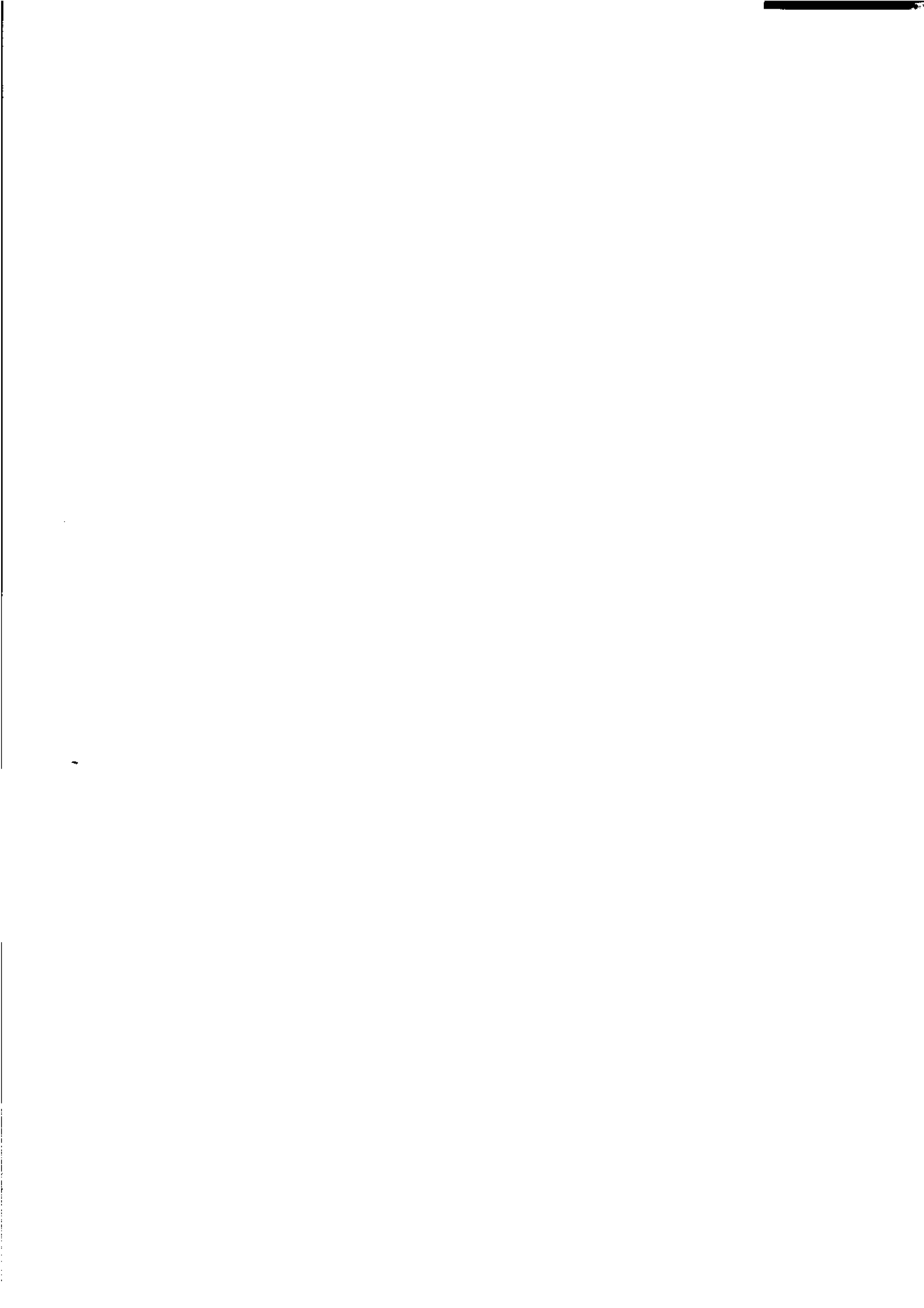


# **11**

## ***Tourism and Transport***



## INTRODUCTION

Periodically, people become tourists when their leisure or business activities lead them away from their home bases. This chapter provides information of tourist activity affecting Australian and Victorian communities. Details on road and rail transport and vehicular use are also covered.

## TOURISM

The importance of the tourist industry is reflected in its impact on the economy as a major generator of new employment opportunities and additional income. In 1991-92 the tourist industry contributed \$3.7 billion (4 per cent) to Victorian Gross State Product (GSP). It generated jobs for 130,000 persons (6 per cent of the Victorian workforce).

### Overseas visitors

The Balance of Payments estimates which relate to Australia's financial transactions with the rest of the world, refer within the services account to travel credits and debits. Travel credits measure the value of goods and services acquired in Australia by non-resident travellers. Non-resident travellers include persons visiting Australia for reasons of business, study, health or recreation for less than one year. Foreign military personnel on rest and recreation leave in Australia are included as non-resident travellers. Foreign students studying in Australia are included in the figures even if their period in Australia exceeds one year.

The values of travel service credits for the six years to 1992-93 are shown in Table 11.1. The only year to show a real reduction was 1989-90 when the value of travel service credits at constant prices decreased by 6 per cent over the previous year. This followed two major tourist events, namely, the Expo 88 World Trade Fair in Brisbane, and the 1788-1988 Bicentenary celebrations of European settlement in Australia.

TABLE 11.1 BALANCE OF PAYMENTS TRAVEL SERVICE CREDITS

Credits	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93
	\$ million					
At current prices	3,565	4,330	4,368	4,983	5,437	5,753
At 1989-90 prices	4,102	4,642	4,368	4,938	5,138	5,312
	Annual percentage change					
At 1989-90 prices	30.1	13.2	-5.9	13.0	4.1	3.4

**Short-term overseas visitors**

Short term overseas visitors are defined as travellers whose intended stay or actual period of stay is less than twelve months, except those who on arrival hold migrant visas.

During 1986 there were 1.4 million short-term overseas visitors to Australia. By 1992 the number had increased by over 80 per cent to 2.6 million with 63 per cent arriving from Japan, New Zealand, the UK and Ireland, and the USA.

**TABLE 11.2 SHORT-TERM OVERSEAS VISITOR ARRIVALS TO AUSTRALIA BY COUNTRY OF RESIDENCE, 1986 AND 1992**

Country of residence	1986		1992		Percentage increase
	Number	Per cent	Number	Per cent	
Japan	145,610	10.2	629,800	24.2	332.5
New Zealand	336,740	23.6	447,500	17.2	32.9
UK and Ireland	183,380	12.8	298,800	11.5	62.9
USA	245,390	17.2	262,900	10.1	7.1
Other	518,260	36.3	964,300	37.0	86.1
<b>All countries</b>	<b>1,429,380</b>	<b>100.0</b>	<b>2,603,300</b>	<b>100.0</b>	<b>82.1</b>

The number of Japanese visitors increased by over 300 per cent in the six years to 1992, a much larger increase than for the other three countries. Visitors from the UK and Ireland on average stayed longer than those from the other three countries.

The Bureau of Tourism Research International Visitor Survey revealed a more detailed profile of short term overseas visitors to Australia in 1991. The average length of stay in Australia in 1991 was 30 days, with expenditure by each visitor about \$1,800. On that basis, aggregate expenditure by overseas tourists in Australia was approximately \$4,300 million in 1991.

**Visitor profiles**

The following section provides profiles of the largest nationality groups to visit Australia and Victoria, based on information from the 1991 Bureau of Tourism Research International Visitor Survey.

**New Zealand visitors**

During 1991, there were 480,600 New Zealand visitors, accounting for 20 per cent of all international visitors to Australia. Of these, 28 per cent stayed at least one night in Victoria. They also accounted for 18 per cent of all overseas visitors who spent at least one night in Victoria. A total of 9 million nights were spent in Australia by New Zealand tourists. The average duration of stay was 21 nights in Australia of which 11 nights were spent in Victoria. There was a fairly even distribution of New Zealand visitors across all age groups. The main reasons given as their purpose of visit were holidays and visiting relatives. The average trip expenditure by New Zealanders was \$1,281, an average of \$61 per night. The average expenditure for food, drink and accommodation was \$472 and the average expenditure for shopping was \$463. New Zealanders spent 55 per cent of their nights in Australia with friends or relatives. Climate and being with friends and relatives were the main reasons for New Zealand tourists enjoying their visit. Of all New Zealand visitors to Victoria, over half visited the Queen Victoria market, and about a quarter visited each of the Dandenong Ranges and the Melbourne Zoo.

**Japanese visitors**

During 1991, there were 528,500 Japanese visitors, accounting for 22 per cent of all international visitors to Australia. Of these, 23 per cent stayed at least one night in Victoria. They accounted for 16 per cent of all overseas visitors who spent at least one night in Victoria. A total of 4.3 million nights were spent in Australia by Japanese tourists. The average duration of stay was 8 nights in Australia of which 3 nights were spent in Victoria. The majority of Japanese visitors (41 per cent) to Australia in 1991 were aged 20-29 years. The main reason given by Japanese visitors as their purpose of visit was holidays. The average trip expenditure by Japanese visitors was \$1,329 with an average of \$166 per night. Their average expenditure on shopping of \$844 was well above the average of \$533 for all overseas country visitors. The average expenditure of \$248 for food, drink and accommodation and \$57 for organised transport by Japanese visitors was well below the averages for all overseas country visitors. In contrast to other major overseas country visitors the greater proportion of nights spent (59 per cent) in Australia by Japanese visitors was in hotels with facilities. Scenery was nominated by 11 per cent of Japanese visitors as the most enjoyable single aspect of their trip to Australia. Of all Japanese visitors, 61 per cent visited Captain Cook's cottage and the Fitzroy gardens, and 55 per cent visited the Queen Victoria market and Phillip Island.

**UK and Ireland visitors**

During 1991, there were 273,400 visitors from the UK and Ireland, accounting for 12 per cent of all international visitors to Australia. Of these, 38 per cent stayed at least one night in Victoria. They also accounted for nearly 14 per cent of all overseas visitors who spent at least one night in Victoria. A total of 15.2 million nights were spent in Australia by UK and Ireland visitors. The average duration of stay was 60 nights in Australia of which 25 nights were spent in Victoria. The largest number of UK and Ireland tourists to Australia were either from the 20-29 year age group and the over 60 year age group. The main reasons given as their purpose of visit were holiday and visiting relatives. Their average trip expenditure was \$2,431, with an average nightly expenditure of \$41. UK and Ireland visitors, on average, spent \$1,152 on food and accommodation (significantly above the average of \$678 for all overseas country visitors) and \$441 on shopping. UK and Ireland visitors spent over 5 per cent of their nights in Australia with friends or relatives. Climate and visiting friends and relatives were nominated as the most enjoyable aspects of their trip. Of all UK and Ireland visitors, 38 per cent visited the Royal Botanic gardens, 31 per cent visited the Queen Victoria market, and 30 per cent visited the Dandenong Ranges.

**USA visitors**

During 1991, there were 271,800 USA tourists, accounting for 11 per cent of all international visitors to Australia. Of these, 40 per cent stayed at least one night in Victoria. They accounted for 14 per cent of all overseas visitors who spent at least one night in Victoria. A total of 6.7 million nights were spent in Australia by USA visitors. The average duration of stay was 27 nights in Australia of which 8 nights were spent in Victoria. USA tourists were fairly evenly distributed across adult age groups. The main reason given as their purpose of visit was holidays. The average trip expenditure for USA visitors was \$1,836, with an average of \$68 per night. The major proportion of expenditure (\$846)

was on food, drink and accommodation. USA visitors spent 39 per cent of their nights in Australia with friends or relatives and 26 per cent in hotels with facilities. "People" was nominated by 27 per cent of USA tourists as the main reason for their enjoyment of stay. Of all USA visitors to Victoria 38 per cent visited the Royal Botanic gardens, 37 per cent visited the Queen Victoria market, and 35 per cent visited Phillip Island.

**TABLE 11.3 CHARACTERISTICS OF SHORT TERM OVERSEAS VISITORS TO AUSTRALIA, 1991**

	<i>Japan</i>	<i>New Zealand</i>	<i>UK and Ireland</i>	<i>USA</i>	<i>All countries</i>
Visitors to Australia	528,500	480,600	273,400	271,800	2,370,400
Average stay (days)	8	21	60	27	30
No. on group tours (per cent)	73	4	2	8	22
Accommodation -					
			per cent		
Hotels with facilities	59	11	5	26	14
Friends or relatives	18	55	53	39	48
Rented house/flat	10	15	15	13	14
Backpackers	4	1	11	5	7
Motels with facilities	4	6	3	6	6
Age distribution -					
Under 20 years	8	12	10	8	10
20-29 years	41	15	24	14	25
30-39 years	16	19	15	20	19
40-49 years	13	20	15	21	17
50-59 years	12	14	16	16	14
60 years or over	9	18	22	21	15
Main reasons for enjoyment -					
People	9	8	8	27	11
Friends and relatives	2	18	16	9	10
Scenery	11	4	10	10	10
Climate	4	19	18	4	10
Other	16	9	12	12	12
Per capita spending -					
Food, drink and accommodation	19	37	47	46	37
Shopping	64	36	18	17	29
Organised transport	4	12	16	17	13
Tours	4	2	5	8	4
Other	9	13	13	12	16
Per capita spending (\$)	1,329	1,281	2,431	1,336	1,819
Aggregate spending (\$m)	702	616	665	499	4,312

Source: Bureau of Tourism Research, International Visitor Survey, Bureau of Tourism Research, International Visitors Survey.  
Estimates are based on a sample and are subject to sampling error.

TABLE 11.4 VISITORS TO AUSTRALIA, BY PLACES VISITED - VICTORIA, 1991

Places visited	Country of residence											Total		
	United States	Japan	Asia	Hong Kong	Malesia	Singapore	Canada	New Zealand	UK & Ireland	Europe	Germany		Scandinavia	Other
	Par cent (a)													
Meibourne	95	99	97	95	99	96	91	94	92	89	84	89	97	94
Royal Botanic gardens	38	18	31	23	43	26	37	22	38	37	43	23	30	30
Queen Victoria market	37	55	46	38	55	50	44	52	31	42	48	32	43	44
Phillip Island	35	55	33	37	25	29	24	10	25	29	31	19	23	31
Captain Cook's cottage/ Fitzroy gardens	28	61	27	39	27	26	23	19	21	22	30	17	15	29
Victorian Arts Centre/Theatre/ Concert hall	18	7	18	17	27	18	19	22	17	20	23	16	19	17
National Gallery of Victoria	19	13	21	14	29	17	20	16	22	21	21	18	25	19
Meibourne Zoo	21	21	22	24	17	7	24	23	19	23	24	20	28	22
Museum of Victoria	19	13	20	18	23	12	16	14	17	18	23	16	24	17
Old Meibourne Gaol	5	7	4	3	3	5	14	7	16	9	12	4	12	8
Sovereign Hill at Ballarat	9	5	22	27	32	25	13	11	23	15	10	13	9	14
Healesville Sanctuary	9	1	8	5	5	7	10	14	15	12	12	8	12	10
The Twelve Apostles/ Great Ocean Road	11	3	11	9	8	13	26	6	27	27	32	25	13	14
Dandenong Ranges	16	1	13	9	12	13	18	25	30	19	21	13	22	17
The Grampians National Park	4	1	5	8	1	2	7	2	8	14	13	14	5	5
	Total who visited one or more attractions in Victoria													
Percentage of visitors to Victoria	95	99	97	95	100	96	91	96	93	91	86	91	99	95
Percentage of visitors to Australia	39	22	34	46	36	21	37	27	35	39	38	39	18	30

(a) Percentages may add to more than 100% as visitors may have visited more than one attraction. Base: All visitors aged 15+. Source: Bureau of Tourism Research, International Visitors Survey.

**Victoria as a tourist destination**

In 1991, 32 per cent of short term overseas visitors to Australia spent at least one night in Victoria, and 18 per cent of total visitor nights in Australia were also spent in Victoria. Assuming that average expenditure per day by each overseas visitor to Victoria was the same as elsewhere in Australia, aggregate expenditure by them in Victoria in 1991 is estimated at over \$700 million. New Zealanders represented the largest nationality grouping to visit Victoria, followed by Japan.

**TABLE 11.5 PROFILE OF ALL SHORT-TERM OVERSEAS VISITORS TO VICTORIA, 1991**

<i>Country of residence</i>	<i>Visitors to Victoria</i>	<i>Average nights in Victoria</i>	<i>Average expenditure per arrival per night</i>	<i>Aggregate expenditure in Victoria (a)</i>
	no.	no.	\$	\$'000
New Zealand	135,000	11	61	90,000
Japan	122,000	3	166	61,000
USA	109,000	8	68	59,000
UK and Ireland	104,000	25	41	107,000
Singapore	19,000	13	94	23,000
<b>All countries</b>	<b>759,000</b>	<b>16</b>	<b>61</b>	<b>740,000</b>

(a) Based on average expenditure per day in Australia and length of stay in Victoria. Figures are based on sample data and are subject to sampling error.

Source: Bureau of Tourism Research, International Visitors Survey.

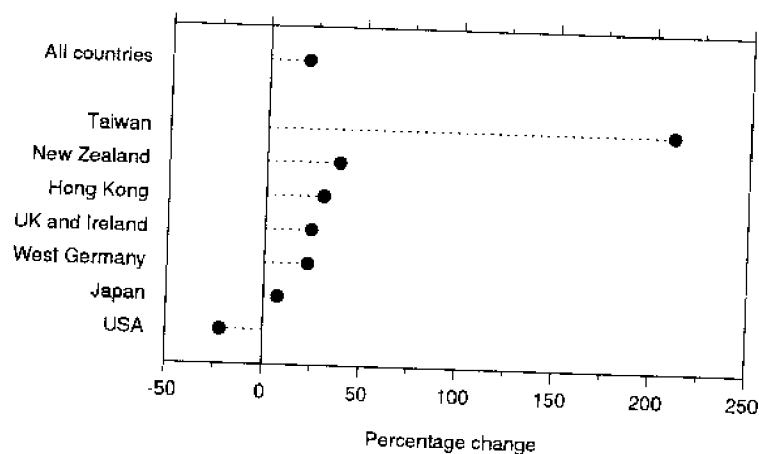
In 1992, 14 per cent of the 2.6 million short term visitors to Australia nominated Victoria as their State of intended stay. This was less than the previous year, mainly due to a large reduction in visitors from New Zealand nominating Victoria as their main destination, which was only partially compensated by increased numbers from most other countries.

**TABLE 11.6 SHORT-TERM VISITOR ARRIVALS BY SELECTED COUNTRY OF RESIDENCE, AND WHERE PRIMARY STATE OF INTENDED STAY IS VICTORIA**

<i>Country of residence</i>	1987	1988	1989	1990	1991	1992
New Zealand	56,700	67,000	63,400	62,200	99,000	78,200
UK and Ireland	38,900	45,500	28,300	47,400	45,800	48,300
USA	50,800	48,200	38,200	39,200	36,900	39,700
Japan	34,400	49,300	41,600	43,300	38,900	37,000
Hong Kong	13,800	12,700	14,100	14,600	17,100	17,900
West Germany	11,700	12,600	13,400	12,800	13,200	14,300
Taiwan	4,100	5,400	6,100	7,200	9,600	12,700
Malaysia	11,100	12,200	11,600	11,200	10,500	12,700
Singapore	6,100	6,900	7,500	10,100	11,300	12,300
Canada	8,000	9,300	8,100	8,200	8,100	7,600
Indonesia	2,800	4,900	4,000	5,700	5,800	7,500
Italy	5,400	6,700	6,000	6,000	6,100	6,500
Netherlands	4,400	5,300	4,600	5,000	5,200	5,200
<b>All countries</b>	<b>298,900</b>	<b>346,700</b>	<b>330,900</b>	<b>336,800</b>	<b>366,600</b>	<b>360,800</b>



**SHORT-TERM VISITOR ARRIVALS, BY COUNTRY OF RESIDENCE WHERE STATE OF INTENDED STAY IS VICTORIA, PERCENTAGE CHANGE 1987 TO 1992**



The main reasons for the visit to Victoria were holidays or accompanying a business traveller (49 per cent), and visiting relatives (27 per cent).

**TABLE 11.7 SHORT-TERM VISITOR ARRIVALS BY COUNTRY OF RESIDENCE, REASON FOR STAY, AND WHERE STATE OF INTENDED STAY IS VICTORIA, 1992**

Country of residence	Reason for journey				Total
	Visiting relatives	Holiday, accompanying business traveller	Business employment, attending convention	Other and not stated	
New Zealand	21,500	36,200	15,600	4,900	78,200
UK and Ireland	23,400	17,700	6,100	1,100	48,300
USA	7,700	18,700	11,600	1,700	39,700
Japan	1,100	30,900	3,800	1,300	37,000
Hong Kong	4,400	9,800	1,900	1,800	17,900
Germany	2,900	9,300	1,600	600	14,300
Malaysia	4,100	4,400	1,300	2,800	12,700
Taiwan	1,100	10,100	900	600	12,700
Singapore	2,700	5,900	2,400	1,200	12,300
Canada	2,700	3,600	900	400	7,600
Indonesia	1,200	3,800	900	1,600	7,500
Italy	2,700	2,800	800	200	6,500
Netherlands	2,500	2,100	400	100	5,200
<b>All countries</b>	<b>98,500</b>	<b>178,100</b>	<b>58,900</b>	<b>25,300</b>	<b>360,800</b>

### Departures by Australian residents

Travel services debits measure the value of goods and services acquired by Australians while they are abroad and represent a withdrawal from Australia's overseas financial reserves. After a strong increase in travel service debits in both 1987-88 and 1988-89, the growth slowed then went into decline from 1990-91 onwards, reflecting the impact of the recession in Australia on resident tourist expenditure overseas.

**TABLE 11.8 BALANCE OF PAYMENTS TRAVEL SERVICE DEBITS**

Debits	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93
	\$ million					
At current prices	3,749	4,363	5,135	5,230	5,147	5,569
At 1989-90 prices	3,807	4,789	5,135	4,800	4,556	4,404
	Percentage change					
At 1989-90 prices	21.0	25.8	7.2	-6.5	-5.1	-3.3

### Interstate travel

An indication of tourist activity by Victorian residents can be gauged by their mobility on Population Census night, 6 August 1991. On that night about 108,000 Victorian residents were counted at locations throughout Victoria other than their usual residence. Another 77,000 Victorian residents were counted at interstate locations. In contrast, there were 52,000 interstate visitors to Victoria.

In 1991-92, there were 36 million intrastate trips undertaken within Australia compared with 37.5 million in 1990-91. Victorian residents accounted for 7.7 million (21 per cent) of the national total which was a 15 per cent decrease from 1990-91.

As a source of interstate travellers, Victoria accounted for 27 per cent of the national total in 1991-92 compared with 30 per cent in 1990-91. The number of trips taken decreased from 3.5 million in 1990-91 to 3.3 million in 1991-92, a decrease of 6.2 per cent.

The most recent Household Expenditure Survey, conducted in 1988-89, estimated that the average Victorian household spent \$10.91 per week (1.5 per cent of total weekly household expenditure) on holidays within Australia. Victorians holidaying in Australia spent about 40 per cent of their holiday money on accommodation, 25 per cent on package tours, 20 per cent on other air fares, and 9 per cent on petrol.

### Overseas travel

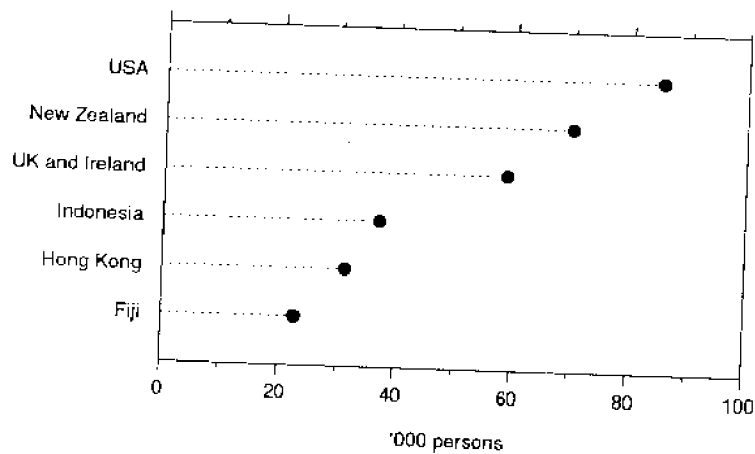
Victorian residents spent an additional \$7.42 per week per household on overseas holidays, or approximately 1 per cent of total weekly household expenditure (\$710). Nearly half of the expenditure on overseas holidays by Victorian residents was on air fares.

"Short term overseas departures" represents travellers whose intended or actual period of stay is less than twelve months, except those who on arrival hold migrant visas. In 1992, there were about 534,000 short term overseas departures by Victorian residents, an increase of 10 per cent over 1991.

**TABLE 11.9 VICTORIAN RESIDENTS - SHORT TERM OVERSEAS DEPARTURES BY COUNTRY OF STAY, 1986 TO 1992**

Country of stay	1987	1988	1989	1990	1991	1992
USA	46,700	53,400	65,400	72,600	78,500	85,400
New Zealand	56,500	54,000	60,800	65,100	63,800	70,000
UK and Ireland	50,700	53,800	57,600	62,700	52,300	58,800
Indonesia	32,500	35,300	39,000	36,600	37,300	37,100
Hong Kong	25,000	23,500	27,400	28,300	28,400	31,300
Fiji	15,200	20,000	25,800	30,900	24,400	22,800
Malaysia	12,500	11,800	16,000	20,600	17,300	19,500
Thailand	12,800	16,200	22,600	23,800	16,900	17,200
Singapore	13,500	14,700	19,100	17,500	16,700	18,400
Other	135,600	140,800	157,700	167,100	150,900	126,100
<b>Total</b>	<b>401,000</b>	<b>423,500</b>	<b>491,400</b>	<b>525,300</b>	<b>486,400</b>	<b>534,000</b>

The main reasons for short term departures of Victorian residents in 1992 were holidays, including student vacation (51 per cent), visiting relatives (23 per cent), and business (16 per cent).

**SHORT-TERM DEPARTURES OF VICTORIAN RESIDENTS BY COUNTRY OF STAY**

**Tourist accommodation**

At 31 December 1992, 17 per cent of bed spaces in hotels, motels and guest houses with facilities in Australia were available in Victoria, and 17 per cent of takings (\$411 million) were collected from such accommodation.

**TABLE 11.10 HOTELS, MOTELS AND GUEST HOUSES WITH FACILITIES: OPERATIONAL DETAILS (a)**

Item	Unit	1990	1991	1992
Victoria				
Establishments	no.	1,032	1,029	1,039
Guest rooms	no.	28,180	29,077	29,995
Bed spaces	no.	78,445	80,503	82,442
Guest nights	'000	8,045.4	8,160.4	8,384.4
Takings	\$'000	389,031	397,127	411,314
Victoria as a percentage of Australia				
Establishments	per cent	21.1	21.1	21.2
Guest rooms	per cent	17.9	18.0	18.0
Bed spaces	per cent	17.3	17.3	17.3
Guest nights	per cent	16.0	15.8	15.7
Takings	per cent	17.2	17.0	16.9

(a) Establishments, Guest Rooms, Bed Spaces as at 31 December.

**TABLE 11.11 ROOM OCCUPANCY RATES, VICTORIA**

Quarter	1990	1991	1992
	Per cent		
March	56.6	48.0	48.1
June	49.8	43.7	44.3
September	46.8	44.8	44.2
December	46.8	46.9	46.6

**Regional tourist accommodation**

Of the nearly 30,000 guest rooms with facilities in Victoria at 31 December 1992, almost half were within the MSD. Room occupancy rates in the MSD each quarter in 1992 were at least six percentage points above the State average and takings from accommodation accounted for 69 per cent of the Victorian total.

Outside the MSD, the Statistical Divisions of Goulburn and Ovens-Murray, both within reach of the snow fields, had the greatest number of rooms and the highest level of accommodation takings. Although their occupancy rates were both below average, each peaked in the September quarter during the skiing season. The Barwon Statistical Division, which encompasses Geelong and the beach resorts of Point Lonsdale, Apollo Bay, Ocean Grove, Bells Beach, and Lorne, experienced a strong seasonal peak in the March quarter, which is the peak for beach resort activities.

**TABLE 11.12 HOTELS, MOTELS, AND GUEST HOUSES WITH FACILITIES:  
OPERATIONAL DETAILS BY STATISTICAL DIVISION, 1992 (a)**

Statistical Division	Establishments	Guest Rooms	Room Occupancy Rates (Quarterly)				Takings from Accommodation
			March	June	September	December	
			Per cent				
	No.	No.					\$'000
Melbourne	248	14,847	55.5	50.7	50.7	54.6	282,529
Barwon	78	1,544	51.9	38.5	33.0	43.4	15,091
Western District	77	1,313	45.3	42.5	36.1	44.5	11,375
Central Highlands	59	1,138	50.5	48.0	44.6	49.6	12,675
Wimmera	51	857	40.7	38.6	34.7	41.6	6,540
Mallee	68	1,590	43.1	45.3	44.6	46.0	13,327
Loddon-Campaspe	86	1,487	47.7	46.7	43.5	46.3	15,056
Goulburn	122	2,332	31.8	33.1	36.5	31.5	19,192
Ovens-Murray	107	2,214	28.7	30.1	41.6	24.9	16,819
East Gippsland	68	1,268	45.0	36.5	33.7	40.2	9,773
Gippsland	75	1,405	42.8	33.2	28.2	34.4	8,935
<b>Victoria</b>	<b>1,039</b>	<b>29,995</b>	<b>48.1</b>	<b>44.3</b>	<b>44.2</b>	<b>46.6</b>	<b>411,314</b>

(a) Number of establishments and guest rooms as at 31 December 1992.

**Five star  
accommodation**

In Victoria the 7 five-star establishments provided 6 per cent of bed spaces and accounted for 18 per cent of accommodation takings in December 1992.

**TABLE 11.13 HOTELS, MOTELS AND GUEST HOUSES BY STAR GRADING, 1992 (a)**

Item	Star grading					Total
	1	2	3 and 4	5	Ungraded	
<b>Victoria</b>						
Establishments	35	401	496	7	100	1,039
Guest rooms	340	7,594	17,489	2,413	2,159	29,995
Bed spaces	870	21,939	48,826	5,568	5,850	82,442
Room nights	22,481	990,643	3,123,816	495,812	317,283	4,950,035
Takings (\$'000)	873	53,086	257,161	75,619	24,572	411,314
<b>Australia</b>						
Establishments	146	1,844	2,180	59	668	4,897
Guest rooms	2,099	39,132	92,352	18,291	14,723	166,597
Bed spaces	5,374	113,761	272,102	43,582	41,275	476,094
Room nights	239,519	5,807,115	17,676,450	4,284,878	2,288,840	30,296,802
Takings (\$'000)	8,754	285,156	1,366,474	594,282	173,081	2,427,748
<b>Victoria as a percentage of Australia</b>						
Establishments	24	21.7	22.8	11.9	15	21.2
Guest rooms	16.2	19.4	18.9	13.2	14.7	18.0
Bed spaces	16.2	19.3	17.9	12.8	14.2	17.3
Room nights	9.4	17.1	17.7	11.6	13.9	16.3
Takings	10.0	18.6	18.8	12.7	14.2	16.9

(a) Establishments, guest rooms, bed spaces as at 31 December 1991.

**Caravan Parks**

Short-term caravan parks accounted for 75 per cent of all caravan establishments in Victoria in 1992, 81 per cent of all caravan sites for tourists and 71 per cent of all accommodation takings from caravan parks. As is to be expected, caravan parks are utilised more in the summer months.

**TABLE 11.14 CARAVAN PARKS: OPERATIONAL DETAILS, VICTORIA, 1992**

Item	Unit	Quarter			
		March	June	September	December
Short term -					
Establishments	no.	455	453	440	442
Sites for tourists	no.	54,822	54,628	53,654	53,482
Takings	\$'000	15,896	9,729	9,424	12,975
Occupancy rates	per cent	41.0	35.3	32.9	38.3
Total -					
Establishments	no.	597	594	592	591
Sites for tourists	no.	67,042	66,726	66,605	66,086
Takings	\$'000	21,037	14,410	14,362	18,168
Occupancy rates	per cent	42.3	37.6	35.5	39.9

**TRANSPORT**

In 1991-92 the transport, storage, and communication industry sector contributed 7 per cent of the total Victorian Gross Domestic Product (GDP) at factor cost. Victoria's percentage share of the national GDP at factor cost for the Transport, storage, and communication industry sector was 23 per cent.

**Rail**

At 30 June 1993 there were over 5,000km open for rail traffic in Victoria, slightly less than in previous years. Goods train traffic kilometres generally decreased over a 5 year period, and the number of suburban passenger journeys has fluctuated between 100 million and 109 million. Country and interstate passenger journeys are now decreasing after a consistent increase up until 1990-91.

**TABLE 11.15 RAILWAYS TRAFFIC, EXCLUDING ROAD MOTOR SERVICES, VICTORIA**

Traffic	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93
Route kilometres open for traffic at end of year	5,240	5,138	5,196	5,180	5,107	5,107
				(000)		
Traffic train kilometres -						
Country and interstate	7,045	7,225	7,127	7,113	7,083	7,036
Suburban	13,800	13,800	13,307	12,874	12,261	n.a.
Goods	6,590	5,801	5,898	5,532	4,884	5,387
<b>Total</b>	<b>27,435</b>	<b>26,826</b>	<b>26,332</b>	<b>25,519</b>	<b>24,428</b>	<b>n.a.</b>
Passenger journeys -						
Country and interstate	5,478	5,825	6,065	6,151	5,556	5,309
Suburban (a)	100,040	105,561	107,932	106,772	108,911	106,015
<b>Total</b>	<b>105,518</b>	<b>111,386</b>	<b>113,997</b>	<b>112,923</b>	<b>114,467</b>	<b>111,324</b>

(a) These figures exclude suburban rail journeys made on multi-modal tickets purchased on trams or buses.

Source: Public Transport Corporation, Victoria.

**Bus**

Metropolitan Melbourne is served by both Government and private buses. From 1 July 1983, bus services in Victorian country areas and provincial centres came under the control of the Public Transport Authority (V/Line). The services are operated by private bus companies, some of which are under contract to V/Line to provide coach services connecting with or extending the rail network.

**TABLE 11.16 COUNTRY AND PROVINCIAL ROAD PASSENGER SERVICES, VICTORIA**

Particulars	1990-91	1991-92	1992-93
<b>PRIVATE BUS SERVICES</b>			
Country services -			
Passengers ('000)	4,335	4,438	4,181
Bus kilometres ('000)	8,012	8,652	8,141
Revenue (\$'000)	8,129	8,833	7,905
Subsidy (\$'000)	4,688	5,018	4,845
Urban services (a) -			
Passengers ('000)	7,396	7,885	7,584
Bus kilometres ('000)	6,086	6,190	6,795
Revenue (\$'000)	4,342	4,340	5,879
Subsidy (\$'000)	9,996	10,429	10,208
<b>CONTRACT SERVICES (b)</b>			
Passengers ('000)	n.a.	n.a.	n.a.
Bus kilometres ('000)	4,269	4,480	4,629
Contract costs (\$'000)	n.a.	7,103	7,227

(a) Covers the Geelong, Ballarat, Bendigo, and La Trobe Valley areas.

(b) Under contract to V/Line.

Source: Public Transport Corporation, Victoria

**Motor Vehicles on Register**

There were 2.7 million motor vehicles on register in Victoria at 30 June 1993, with 2.9 million driver's licences and 172,000 riders licences in force.

**TABLE 11.17 MOTOR VEHICLES ON REGISTER, AT 30 JUNE**

Type of vehicle	1988	1989	1990	1991	1992	1993
			( '000)			
Passenger vehicles	2,064.7	2,076.2	2,137.8	2,226.5	2,178.1	2,206.6
Light commercial vehicles (a)	398.6	401.8	405.4	349.2	322.5	324.9
Trucks -						
Rigid (a)	n.a.	n.a.	n.a.	87.0	73.0	74.2
Articulated	13.8	13.1	14.2	14.6	14.3	14.6
Non freight carrying	13.7	11.7	13.0	11.3	11.4	11.7
Buses	14.3	13.9	13.8	14.4	15.6	15.9
Motor cycles	70.1	68.1	67.9	72.2	69.9	70.4
<b>Total - Victoria</b>	<b>2,575.2</b>	<b>2,585.2</b>	<b>2,720.0</b>	<b>2,775.2</b>	<b>2,684.8</b>	<b>2,718.4</b>
<b>Total - Australia</b>	<b>9,544.4</b>	<b>11,485.3</b>	<b>12,116.8</b>	<b>9,934.1</b>	<b>10,246.9</b>	<b>10,431.5</b>
<b>Victoria as a percentage of Australia</b>	<b>26.9</b>	<b>22.5</b>	<b>22.4</b>	<b>27.9</b>	<b>26.2</b>	<b>26.0</b>

(a) Split of data for years prior to 1991 are not comparable. For details from previous years refer to earlier Year Books.

**TABLE 11.18 DRIVERS' AND RIDERS' LICENCES (a) IN FORCE AT 30 JUNE, VICTORIA**

Type of Licence	1988	1989	1990	1991	1992	1993
Drivers'	2,566,312	2,650,700	2,725,835	2,785,753	2,826,735	2,858,683
Riders'	130,394	140,612	149,454	157,916	165,825	172,357
Total	2,696,706	2,791,312	2,875,289	2,943,669	2,992,560	3,031,040

(a) Licence holders may hold both a drivers' and a riders' licence and be counted in both categories.

Source: Vicroads Road Information Services

### Road traffic accidents

In recent years there has been a significant decrease in the number of road traffic accidents and the number of people killed or injured. These decreases may be related to police campaigns, such as increased random breath testing, and the Transport Accident Commission advertisements.

**TABLE 11.19 ROAD TRAFFIC ACCIDENTS INVOLVING CASUALTIES, NUMBER OF PERSONS KILLED OR INJURED, VICTORIA**

Period	Fatal accidents	Total accidents (a)	Persons killed	Persons injured (b)
1986r	611	7,354	669	8,898
1987	626	8,246	705	9,895
1988	627	8,427	701	10,333
1989	681	7,951	776	9,356
1990	492	6,219	548	7,084
1991	435	5,371	503	6,162
1992	365	5,111	396	5,905

(a) Resulting in death or in one or more injured persons being admitted to hospital.

(b) Admitted to hospital.

Source: Vicroads Road Information Services

**TABLE 11.20 ROAD TRAFFIC ACCIDENTS INVOLVING CASUALTIES, TYPE OF ROAD USER KILLED OR INJURED, VICTORIA**

Type of road user	1990		1991		1992	
	Killed	Injured	Killed	Injured	Killed	Injured
Drivers of motor vehicles	232	2,984	216	2,578	144	2,536
Motor cyclists	50	778	50	743	48	681
Passengers (any type)	149	1,809	131	1,616	100	1,483
Pedestrians	93	928	94	848	89	799
Pedal cyclists	24	538	12	357	13	393
Other	..	47	..	20	2	13
<b>Total</b>	<b>548</b>	<b>7,084</b>	<b>503</b>	<b>6,162</b>	<b>396</b>	<b>5,905</b>

Source: Vicroads Road Information Services.



**Motor Vehicle Usage**

Some of the key results from the 1991 Survey of Motor Vehicle Usage are set out in Table 11.21.

**TABLE 11.21 SURVEY OF MOTOR VEHICLE USAGE: SELECTED STATISTICS, 1991**

Particulars	Victoria	Australia	Victoria as a percentage of Australia
Number of vehicles	2,751,275	10,076,830	27.3
Total kilometres travelled (million kilometres)	40,823.6	150,388.7	27.1
Total business kilometres travelled (million kilometres) (a)	12,686.3	50,874.9	24.9
Total tonne-kilometres (million tonne-kilometres)	22,851.3	88,204.5	25.9
Total kilometres travelled (bus) (million kilometres)	292.2	1,400.7	20.9

(a) Includes business travel of non load carrying vehicles except for articulated trucks.

**Air transport**

In 1992-93, over 8.1 million revenue passengers either embarked or disembarked at Melbourne (Tullamarine) airport from 83,000 domestic aircraft movements.

The relatively low aircraft movement and passenger levels for domestic travel in 1989-90 were due to the pilots' dispute. Movement and numbers increased with the resolution of this dispute and the introduction of new airlines offering more services at discount fare levels which in turn created competition within the incumbent airlines. The new airlines were Compass (operating at Melbourne from December 1990 to December 1991) and Southern Cross (operating from August 1992 to March 1993). A greater range of discount fares have continued, even with the demise of the new airlines. Domestic passenger activity increased 40 per cent between 1987-88 and 1992-93. Aircraft movements increased 20 per cent during the same period as the airlines rationalised their fleets.

International air transport continues the strong growth recorded in earlier years. Both passenger activity and aircraft movements in 1992-93 reflected significant increases over 1987-88 with growth of 22 and 18 per cent respectively.

**TABLE 11.22 MELBOURNE (TULLAMARINE) AIRPORT**

Particulars	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93
Domestic aircraft movements	68,661	69,473	48,212	68,606	77,494	82,835
Domestic passengers embarked ('000)	2,919	2,986	2,308	3,190	4,065	4,042
Domestic passengers disembarked ('000)	2,908	3,014	2,327	3,199	4,081	4,084
International aircraft movements	13,678	14,317	15,318	15,884	15,147	16,093
Passengers arriving from/ departing for overseas ('000)	1,482	1,586	1,685	1,677	1,746	1,813

Source: Department of Transport and Communications.

**TABLE 11.23 REGULAR DOMESTIC INTERSTATE AIR SERVICES  
TERMINATING IN VICTORIA**

<i>Particulars</i>	<i>1987-88</i>	<i>1988-89</i>	<i>1989-90</i>	<i>1990-91</i>	<i>1991-92</i>	<i>1992-93</i>
Kilometres flown ('000)	55,044	57,122	40,575	60,705	71,780	74,232
Passenger kilometres ('000)	5,128,711	5,327,000	4,112,629	5,925,080	7,814,498	7,589,784
Freight -						
Tonnes	93,955	99,813	57,020	75,049	71,995	64,279
Tonne kilometres ('000)	80,803	84,337	45,820	67,121	73,794	71,076
Mail -						
Tonnes	9,863	11,040	5,675	11,062	10,331	11,891
Tonne kilometres ('000)	9,512	10,526	5,829	10,867	10,862	12,801

Source: Department of Transport and Communications.

## REFERENCES

### Data sources

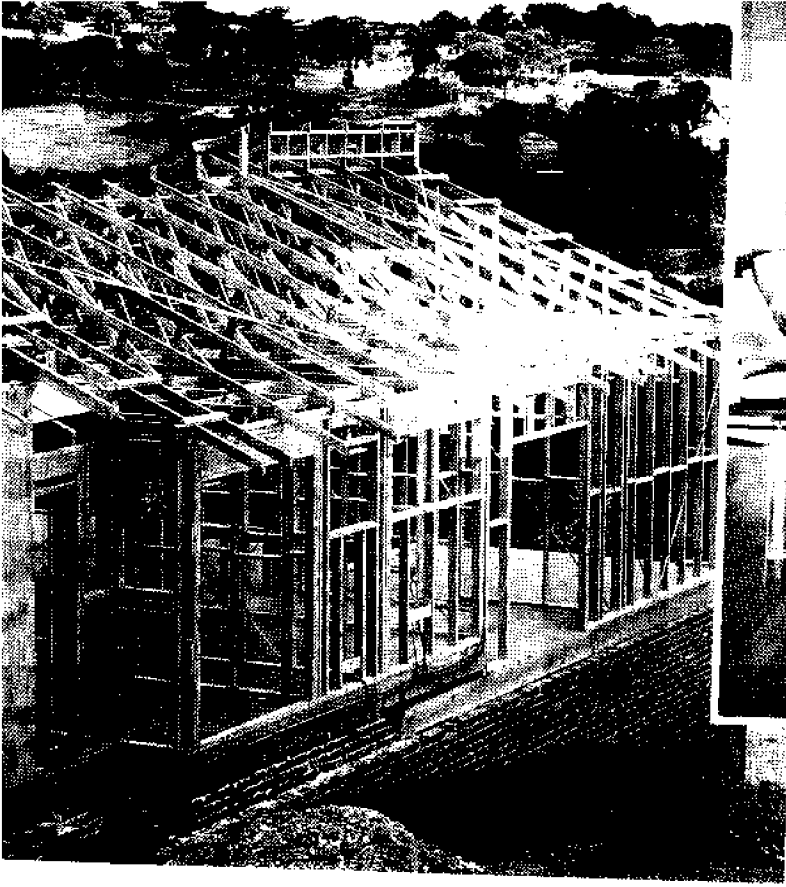
Most of the tourism statistics are from the Bureau of Tourism Research. Other tourism data are from the National Accounts and the Population Census.

Tourist accommodation statistics are derived from the quarterly ABS Accommodation Survey. The survey covers hotels, motels and guest houses with facilities, short and long term caravan parks; and from the September quarter 1987, holiday flats, units, and houses. Data collected includes the number of establishments, available capacity, room occupancy rates, bed occupancy rates, and takings from accommodation. Types of accommodation surveyed include hotels, motels, and guest houses with facilities; caravan parks; and holiday flats, units, and houses. Visitor hostels were added from the September quarter 1991.

The star grading of hotels and motels with facilities is based on the classification system used by members of the Australian Automobile Association. The gradings are allocated according to a points system based on amenities and facilities available to guests at the time of inspection. The highest classification of "five-star" is assigned to international style establishments offering a superior range of apartments, furnishings and decor, with an extensive range of first class services. These include a choice of room styles and dining facilities, twenty-four hour room service, and additional shopping and recreational facilities.

The statistics on railways and country and provincial road passenger services have been obtained through the Public Transport Corporation Victoria. Motor vehicles statistics were obtained from Vicroads, Victoria, and the Commonwealth Department of Administrative Services (for Australian Government owned vehicles). Drivers' and riders' licence figures were provided by the Road Traffic Authority, Victoria.

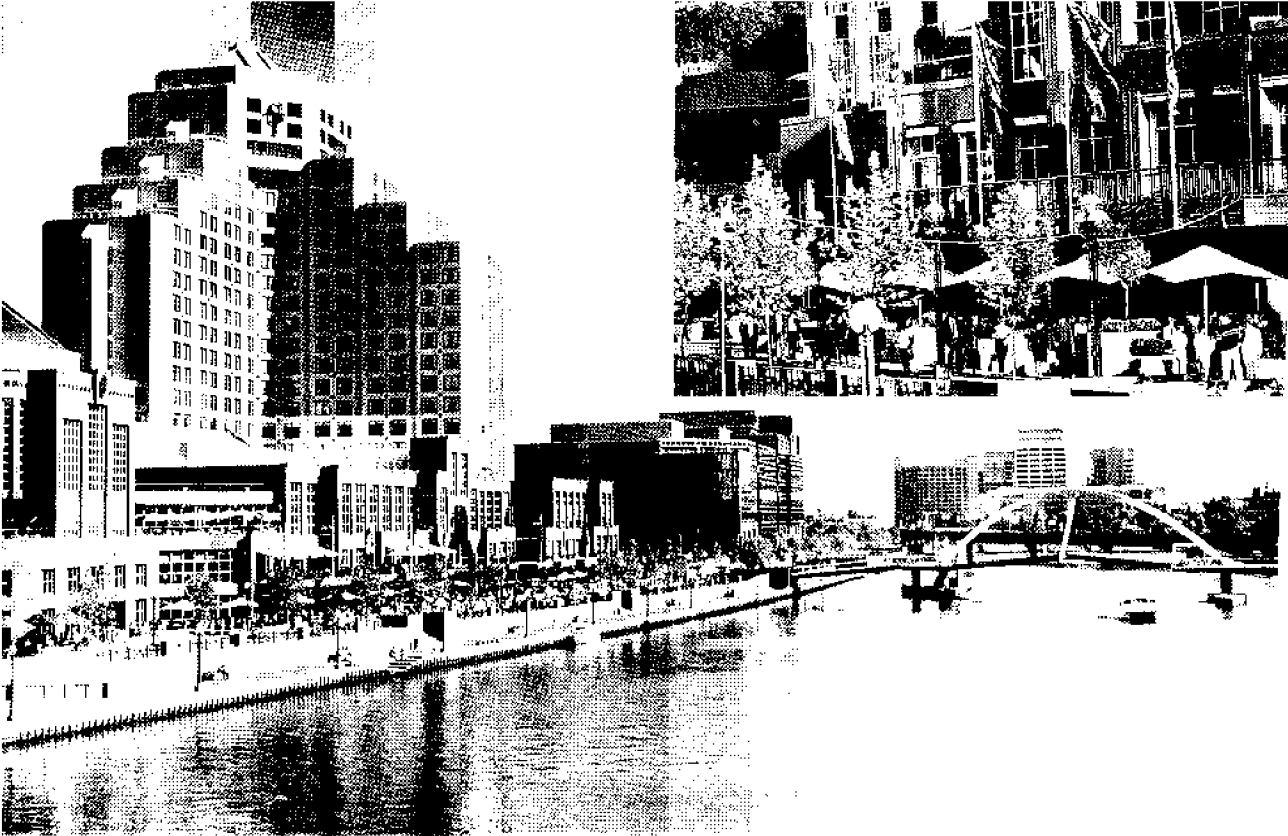
Since 1991 the motor vehicles on register figures are based on a new processing system using the new Vehicle Identification Number (VIN) adopted by motor vehicle registration authorities. The VIN system allows for more accurate identification and classification of newly registered vehicles. As a result, data processed on this system is not strictly comparable with data processed on the old system.



▲ Radiata Pine house frame,  
and the warmth and beauty of  
Victorian Ash hardwood  
highlighted by strips of  
Blackwood. - *Photo: Timber  
Promotion Council.* (Chapter  
reference "Construction" and  
"Commerce".)

▼ *Aerospace Technology, 747 turbine.* - *Photo: Department of  
Business and Employment.* (Chapter reference "Transport".)





▲ View of west end of Southgate. *Inset:* Southgate Arts and Leisure Precinct on the Yarra - *Photos:* David Simmonds. (Chapter reference "Tourism".)

▼ Japanese tourists enjoying meeting a wombat. - *Photo:* Department of Business and Employment. (Chapter reference "Tourism".)



Concurrently, the classification of goods carrying vehicles was altered to reflect the new Third Australian Design Rule. As a result, only those goods carrying vehicles with a gross vehicle mass (GVM) over 3.5 tonnes are now included in rigid trucks and the remainder are either in utilities or panel vans.

The triennial Survey of Motor Vehicle Usage is undertaken by the ABS in response to a wide range of users' needs to monitor the details for motor vehicle usage within Australia. Details obtained determine the total distance travelled by vehicles classified to area of operations and purpose of travel. Information is also obtained on tonne-kilometres, average load carried, vehicle usage (i.e. business or private), fuel consumption, driver characteristics, bus passengers carried and other important variables. The statistics are used for many decisions regarding the monitoring, planning and policy issues that affect all Australian motorists. The 1991 Survey of Motor Vehicle Usage relates to vehicles on register at 30 September 1991.

Road traffic accident statistics are compiled by the ABS from data provided by Vicroads. The statistics on air transport were obtained from the Commonwealth Department of Transport and Communications.

#### **ABS publications**

- Overseas Arrivals And Departures, Australia (3404.0)*
- Australian National Accounts, National Income and Expenditure (5204.0)*
- Balance Of Payments, Australia (5303.0)*
- Household Expenditure Survey, Australia (6535.0)*
- Tourist Accommodation, Australia (8635.0)*
- Tourist Accommodation, Victoria (8635.2)*
- Tourist Accommodation, Four and Five Star Hotels and Motels, Victoria (8646.2)*
- Motor Vehicle Registrations, Australia (9303.0)*
- Motor Vehicle Registrations, Victoria (9303.2)*
- Motor Vehicle Registrations, Australia (9304.0)*
- 1991 Survey of Motor Vehicle Usage (preliminary)*

