

Tourism Businesses in Victoria

June 2017

Tourism businesses

77,800

▲ 3.8%
year-on-year growth

13% of all businesses in Victoria (590,800)

70% of businesses were located in Melbourne

30% of businesses were located in regional Victoria



Tourism businesses by size

Non-employed

46% 0 employees

micro

32% 1-4 employees

small

17% 5-19 employees

medium

4% 20-199 employees

large

0.3% 200+ employees



26%

Cafes, restaurants & take away food



9%

Taxi transport services



5%

Cultural services



4%

Other sports and recreation services



4%

Accommodation services



44%

Other retail trade (tourism connected)

Note: Uber is not included in 'Taxi transport services' and Airbnb is not included in 'Accommodation services'.

Table 1: Tourism Businesses in Victoria by size and type – June 2017

	Employing Businesses				Total Employing	Non-Employing	Total	% of Total
	Micro (1-4 employees)	Small (5-19 employees)	Medium (20-199 employees)	Large (200+ employees)				
Tourism characteristic industries								
Accommodation	745	614	171	12	1,542	1,413	2,955	4%
Cafes, restaurants and takeaway food services	8,294	5,420	1,207	56	14,977	5,208	20,185	26%
Clubs, pubs, taverns and bars	461	626	355	3	1,445	563	2,008	3%
Rail transport	3	0	3	0	6	15	21	0%
Taxi transport	268	35	5	0	308	6,386	6,694	9%
Air and space, water and other transport	247	49	34	6	336	626	962	1%
Motor vehicle hiring	94	20	9	5	128	345	473	1%
Travel agency and tour operator services	651	169	36	9	865	836	1,701	2%
Cultural services	632	101	63	0	796	3,397	4,193	5%
Casinos and other gambling services	208	68	19	3	298	176	474	1%
Other sports and recreation services	969	425	183	23	1,600	1,413	3,013	4%
Total tourism characteristic industries	12,572	7,527	2,085	117	22,301	20,378	42,679	55%
Tourism connected industries								
Automotive fuel retailing	340	306	42	5	693	324	1,017	1%
Other retail trade	12,354	5,590	1,339	107	19,390	14,730	34,120	44%
Total tourism connected industries	12,694	5,896	1,381	112	20,083	15,054	35,137	45%
Total tourism related industries	25,266	13,423	3,466	229	42,384	35,432	77,816	100%
Size & type % of Total	32%	17%	4%	0.3%	54%	46%	100%	

Note: Smaller estimates need to be used with caution as these may not represent the true number of businesses due to rounding undertaken in the confidentialisation process by the ABS. The confidentialisation causes differences in some totals as the origin and scope of each classification such as businesses by tourism regions, tourism industries, type of legal organisations etc. was different in estimates produced by the ABS.

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Tourism is dominated by small businesses which include non-employing*, micro and small businesses employing less than 20 persons. In total these business types equate to 95% of all tourism businesses in Victoria.

Seventy per cent of tourism businesses were located in Melbourne, with thirty per cent located in Regional Victoria. The Murray region had the largest share of tourism businesses in Regional Victoria at 4.2%, followed by the Yarra Valley and Dandenong Ranges (3.9%) and Mornington Peninsula (3.8%).

Table 2: Employing Businesses by Size – tourism regions

June 2017	Employing Businesses				Total Employing	Non-Employing	Total	% of Total
	Micro (1-4 employees)	Small (5-19 employees)	Medium (20-199 employees)	Large (200+ employees)				
Regions								
Melbourne	17,214	8,648	2,353	74	28,289	25,458	53,747	69.6%
Geelong and the Bellarine*	837	519	140	3	1,499	1,072	2,571	3.3%
Great Ocean Road*	603	450	107	0	1,160	674	1,834	2.4%
Mallee	365	220	43	0	628	344	972	1.3%
Goulburn	385	237	50	0	672	429	1,101	1.4%
Central Murray	300	185	31	0	516	295	811	1.1%
Murray East	107	71	21	0	199	127	326	0.4%
Murray	1,157	713	145	0	2,015	1,195	3,210	4.2%
Melbourne East	938	446	107	0	1,491	1,334	2,825	3.7%
Upper Yarra	62	35	6	0	103	82	185	0.2%
Yarra Valley and Dandenong Ranges	1,000	481	113	0	1,594	1,416	3,010	3.9%
Mornington Peninsula	962	528	152	0	1,642	1,315	2,957	3.8%
Gippsland	727	418	76	3	1,224	737	1,961	2.5%
Lakes	223	148	20	0	391	280	671	0.9%
Gippsland	950	566	96	3	1,615	1,017	2,632	3.4%
Ballarat*	408	273	74	0	755	476	1,231	1.6%
Bendigo Loddon	521	335	99	0	955	627	1,582	2.0%
Goldfields	929	608	173	0	1,710	1,103	2,813	3.6%
Victorian High Country	426	318	44	0	788	541	1,329	1.7%
Central Highlands	114	57	6	0	177	104	281	0.4%
Western Grampians	170	125	18	0	313	184	497	0.6%
Wimmera	91	36	3	0	130	97	227	0.3%
Grampians	375	218	27	0	620	385	1,005	1.3%
Macedon	264	129	21	0	414	350	764	1.0%
Spa Country	100	43	11	0	154	114	268	0.3%
Daylesford and the Macedon Ranges	364	172	32	0	568	464	1,032	1.3%
Phillip Island	165	91	17	0	273	149	422	0.5%
Unknown region Vic	142	110	80	110	442	192	634	0.8%
Regional Victoria	7,910	4,774	1,126	116	13,926	9,523	23,449	30.4%
Total Victoria*	25,124	13,422	3,479	190	42,215	34,981	77,196	100%

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Year-on-year growth

June 2017 results compared to June 2016 show **Melbourne** a slight decline for micro employing businesses (-0.4%), however gains for small employing businesses (+1.9%) and medium employing businesses (+8.4%). Large businesses (200+ employees) experienced a decline (-3.9%) indicative of some consolidation (74 compared to 77). Overall Melbourne experienced to a net gain of 269 employing businesses over the period (+1.0%). Non-employing businesses also increased solid growth over the period (+2,325 or +10.1%). In total Melbourne experienced a net gain of 2,594 businesses over the period (+5.1%) the strongest growth of all capital cities. Most capital cities experienced growth in tourism businesses over the period; Sydney (+5.0%), Brisbane (+5.0%), Perth (+4.8%), the Gold Coast (+4.4%), Hobart (+3.6%), Adelaide (+2.4%), as well as Canberra (+1.9%), while Darwin experienced a decline (-1.7%).

Over the same period, **Regional Victoria** experienced a decline in micro and large employing businesses (both down 2.5%) while other business types increased, resulting in a net gain of 59 businesses over the year (+0.3%). Regional New South Wales (+1.0%), Regional South Australia (+0.6%) and Regional Queensland (+0.4%) and also experienced positive growth however declines in total businesses were observed across other non-capital city areas.

Table 3: Annual change (June 2016 to June 2017) in tourism businesses by size

% change June 16/17	Employing Businesses				Total Employing	Non- Employing	Total
	Micro (1-4 employees)	Small (5-19 employees)	Medium (20-199 employees)	Large (200+ employees)			
Melbourne*	-0.4%	1.9%	8.4%	-3.9%	1.0%	10.1%	5.1%
Regional Victoria*	-2.5%	2.0%	4.8%	-2.5%	-0.5%	1.3%	0.3%
Total Victoria	-0.8%	1.9%	6.7%	-0.9%	0.6%	7.9%	3.8%

2012-2017 growth

Victoria experienced the second largest growth rate in total businesses from June 2012 to June 2017 (+5.3% or +3,898 businesses) only behind the Australian Capital Territory (+5.7% or +204 businesses) and compared to New South Wales (+1.7%), Queensland (0.7%) and the national average (+2.0%). The increase in Victoria was driven by achieving growth across all business types including very strong growth in medium (+18.5%) and large (+23.1%) employing businesses since June 2012.

Melbourne experienced strong growth for total businesses (+7.7% or +3,829 businesses) over the period, the strongest growth of all the capital cities and the Gold Coast. Growth in Melbourne was driven by a strong increase in medium (+21.6%) and large businesses (+21.3%) driving total employing business growth of 6.5%, with non-employing businesses also growing over the period (+9.0%).

Regional Victoria, experienced the smallest decline for total businesses (-4.3% or -1,058 businesses) out of all the non-capital city regions across Australia, this was supported by positive growth in medium employing businesses (+8.3%) which helped offset declines in other business types. Small employing businesses in Regional Victoria remained relatively stable (+0.1%). This has occurred alongside growth in employment within the tourism industry in regional Victoria of 12.9% to 85,600 workers over the same period. (Source: *Regional Tourism Satellite Account 2016-17*, Tourism Research Australia).

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June 2017

Table 4: June 2012 to 2017 growth in tourism businesses by size

% change June 2012-2017	Employing Businesses				Total Employing	Non- Employing	Total
	Micro (1-4 employees)	Small (5-19 employees)	Medium (20-199 employees)	Large (200+ employees)			
Melbourne*	3.1%	9.9%	21.6%	21.3%	6.5%	9.0%	7.7%
Regional Victoria*	-2.9%	0.1%	8.3%	-10.1%	-1.1%	-8.7%	-4.3%
Total Victoria	1.7%	6.1%	18.5%	23.1%	4.4%	6.3%	5.3%

For Victoria's tourism regions definitions refer to the map [this link](https://www.business.vic.gov.au/tourism-industry-resources/research/regional-visitation):

<https://www.business.vic.gov.au/tourism-industry-resources/research/regional-visitation>

More Information

Note: State and territory totals may be different from published estimates and also from tables presented elsewhere due to rounding undertaken during the confidentialisation process. Smaller estimates need to be used with caution as these may not represent the true number of businesses due to rounding undertaken in the confidentialisation process by the ABS. Source: Australian Bureau of Statistics, ABS Business Register (unpublished data).

For more detail, including National and State comparisons and time series, please refer to the report *Tourism Businesses in Australia, June 2017*, Tourism Research Australia, Canberra.

<https://www.tra.gov.au/Economic-analysis/tourism-businesses>

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