Tourism businesses in Victoria

June 2023

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## 1.0 Tourism businesses in Victoria – snapshot

* There were 109,595 tourism businesses in Victoria in June 2023. This represented a decrease of 4.0% from June 2022, however, was an increase of 14.9% from June 2019.
* Tourism businesses comprise 15% of the 719,233 businesses in Victoria.
* There were 79,993 tourism businesses in Melbourne. This comprised 73% of all tourism business in Victoria.
* Tourism businesses in Melbourne decreased by 4.9% from June 2022, however increased by 16.0% from June 2019.
* There were 29,602 tourism businesses in regional Victoria. This comprised 27% of all tourism business in Victoria.
* Tourism businesses in regional Victoria decreased by 1.3% from June 2022, however increased by 12.1% from June 2019.

## 1.1 Tourism businesses in Victoria by size

* 52% of all tourism businesses in Victoria were non-employing. These business types decreased by 3.8% from June 2022, however increased by 18.4% from June 2019.
* 28% were micro businesses with 1-4 employees. These business types decreased by 9.8% from June 2022, however increased by 10.7% from June 2019.
* 15% were small businesses with 5-19 employees. These business types increased by 1.7% from June 2022 with an increase of 11.7% from June 2019.
* 4% were medium businesses with 20-199 employees. These business types increased by 21.0% from June 2022 and increased by 14.8% from June 2019.
* 0.2% were large businesses with more than 200 employees. These business types increased by 2.0% from June 2022 but were unchanged from June 2019.

# 2.0 Key results

* There were 109,595 tourism businesses in Victoria in June 2023 representing 15% of all businesses in the state. As such, approximately 1 in 7 Victorian businesses were tourism related, reinforcing its importance to the state’s economy.
* Victoria’s tourism sector is dominated by small businesses which include non-employing, micro and small businesses employing fewer than 20 persons. In total these business types equate to 96% of all tourism businesses in Victoria.
* Since June 2019, tourism businesses have increased by 14.9% or plus 14,227 businesses. This was higher than the growth performance of all other Australian jurisdictions in this period. However, the number of tourism businesses in Victoria decreased by 4.0% (-4,540 businesses) in June 2023 compared to June 2022 due to challenging economic conditions.
* The largest industry sector for tourism businesses was retail trade which accounted for 42% of all tourism-connected businesses (46,199 businesses). This sector has grown by 20.1% since June 2019 (+7,731 businesses), however did note a decline of 2.9% from June 2022, reflecting tougher trading conditions.
* The next largest industry for tourism businesses was the cafés, restaurants and takeaway food services sector (24% of all tourism business or 25,757 businesses). This sector noted a large increase from June 2019 (+13.4% or +3,043 businesses), however, declined between June 2022 to 2023 (-2.1%), as it faced economic headwinds and increased operating pressures.
* The strongest growth in June 2023 compared to June 2022 was noted in the medium employing business category (+21.0%), with softer growth noted in large (+2.0%) and small (+1.7%) business types.
* In comparison, micro (-9.8%) and non-employing (-3.8%) businesses were more vulnerable to negative market conditions and declined. These smaller businesses typically have less resources available to withstand economic fluctuations and operating pressures such as rising costs and higher interest rates.
* Melbourne had more tourism businesses than any other capital in Australia with 79,993 businesses, above Sydney at 78,002.
* Melbourne (-4.9%) and regional Victoria (-1.3%) both recorded overall decreases in tourism businesses in June 2023 compared to June 2022 reflecting weaker economic conditions. The most vulnerable business category for both Melbourne and regional Victoria was the micro sector (-10.7% and -7.4% respectively), with a decline also noted in the non-employing category in Melbourne (-4.9%).
* The Yarra Valley and Dandenong Ranges region had the largest volume of tourism related businesses in regional Victoria in June 2023 with 3,937 businesses, followed closely by the Mornington Peninsula with 3,924 tourism businesses.
* Tourism businesses increased in only two of Victoria’s regions in June 2023 compared to June 2022 including Daylesford and the Macedon Ranges (+9 businesses) and Goldfields (+5 businesses).

# 3.0 Tourism businesses in Victoria by industry

* In June 2023, the tourism connected sector of retail trade comprised 42% of all tourism related businesses in Victoria and recorded high growth of 20.1% compared to June 2019, yet declined by 2.9% from June 2022 reflecting challenging trading conditions.
* Most tourism characteristic businesses were noted within the cafes, restaurants and take away food service category with 25,757 businesses or 24% of the total. Businesses in this category have increased by 13.4% since June 2019, however declined by 2.1% from June 2022.
* Taxi transport services comprised 14,430 tourism businesses or 13% of the total. Businesses in this category increased by 1.2% from June 2019, however declined by 13.1% from June 2022.
* Cultural services comprised 6,331 tourism businesses or 6% of the total. This category increased substantially by 30.1% from June 2019, reflecting an increase in activity in this sector, although also suffered a marginal decline of 0.3% from June 2022.
* Other sports and recreation services comprised 4,400 tourism businesses or 4% of the total. This sector increased by 17.6% from June 2019, although also noted a decline of 2.3% from June 2022.
* Accommodation services comprised 3,542 tourism businesses or 3% of the total and have increased by 3.5% from June 2019, although declined by 5.4% from June 2022.

# 4.0 Tourism related businesses – employing/non-employing

* The number of tourism businesses in Victoria steadily increased from June 2018 to June 2022, despite the impacts of the pandemic. However, as trading conditions softened in 2023 due to the challenging economic environment, a number of businesses exited the sector.
* Between 2022 and 2023, 4,540 tourism businesses left the industry in Victoria.
* Micro businesses with 1-4 employees were the most vulnerable category and declined by 9.8% from June 2022.
* Non-employing businesses also declined in the period, down 3.8%. In comparison, medium sized businesses increased, up 21.0% from June 2022 to June 2023.

## 4.1 Data table: total employing vs non-employing businesses in Victoria from June 2018 to June 2023

| **Year** | **Number of total businesses**  | **Percentage employing** | **Percentage non-employing** |
| --- | --- | --- | --- |
| June 2018 | 89,729 | 52% | 48% |
| June 2019 | 95,368 | 49% | 51% |
| June 2020 | 98,962 | 48% | 52% |
| June 2021 | 102,852 | 53% | 47% |
| June 2022 | 114,135 | 48% | 52% |
| June 2023 | 109,595 | 48% | 52% |

# 5.0 Tourism related businesses by size

* From June 2019 to June 2023, most business categories noted an increase in entrants except for the large business category which was flat. Growth was highest in the non-employing sector (+18.4%), followed by the medium (+14.8%) and small business types (+11.7%).
* However, as economic conditions softened between June 2022 and June 2023, a number of businesses from the micro (-9.8%) and non-employing (-3.8%) sectors exited the industry as these smaller entities often don’t have the resources to navigate fluctuations in trading conditions.
* In comparison, medium and large business types increased (up 21.0% and 2.0% respectively), with marginal growth in small business types (+1.7%).

## 5.1 Data table: total businesses by size 2018 to 2023

| **Year** | **Micro** | **Small** | **Medium** | **Large** | **Non-employing** | **Total** |
| --- | --- | --- | --- | --- | --- | --- |
| June 2018 | 28,056 | 14,163 | 3,802 | 251 | 43,457 | 89,729 |
| June 2019 | 28,150 | 14,725 | 3,926 | 257 | 48,310 | 95,368 |
| June 2020 | 28,095 | 15,141 | 4,030 | 266 | 51,430 | 98,962 |
| June 2021 | 34,246 | 16,032 | 3,720 | 263 | 48,591 | 102,852 |
| June 2022 | 34,538 | 16,172 | 3,727 | 252 | 59,446 | 114,135 |
| June 2023 | 31,169 | 16,452 | 4,508 | 257 | 57,209 | 109,595 |

## 5.2 Data table: change in total businesses by size 2023 vs 2022 and 2019

| **Business size** | **Percentage change compared to June 2022** | **Percentage change compared to June 2019** |
| --- | --- | --- |
| Micro (1-4 employees) | Decreased by 9.8% | Increased by 10.7% |
| Small (5-19 employees) | Increased by 1.7% | Increased by 11.7% |
| Medium (20-199 employees) | Increased by 21.0% | Increased by 14.8% |
| Large (200+ employees) | Increased by 2.0% | Unchanged  |
| Non-employing | Decreased by 3.8% | Increased by 18.4% |

# 6.0 Tourism businesses by state

* In June 2023 most tourism related businesses in Australia were in New South Wales (32.8%), followed by Victoria (30.8%) and Queensland (18.1%).
* Most jurisdictions suffered the negative impacts of challenging economic conditions from June 2022 to June 2023 with most noting only marginal growth in businesses or exits, except for ACT which increased by 3.0%.
* Victoria noted the largest decline in tourism businesses of 4.0%, with a decline of 0.9% also noted in New South Wales, with marginal growth of 0.8% in Queensland.

## 6.1 Data table: businesses by state/ territory volume and change 2023 vs 2022

| **State/territory** | **Employing businesses** | **Non-employing businesses** | **Total businesses** | **Percentage change in total from June 2022 to June 2023** |
| --- | --- | --- | --- | --- |
| New South Wales | 62,019  | 54,674  | 116,693  | Decreased by 0.9% |
| Victoria | 52,386  | 57,209  | 109,595  | Decreased by 4.0% |
| Queensland | 33,807  | 30,625  | 64,432  | Increased by 0.8% |
| Western Australia | 16,151  | 14,622  | 30,773  | Unchanged |
| South Australia | 10,591  | 9,369  | 19,960  | Decreased by 1.1% |
| Tasmania | 3,801  | 2,848  | 6,649  | Decreased by 0.1% |
| ACT | 2,690  | 1,975  | 4,665  | Increased by 3.0% |
| Northern Territory | 1,448  | 1,065  | 2,513  | Decreased by 1.5% |

## 6.2 Data table: share of Australian tourism businesses by state/ territory in June 2023

| **State/territory** | **Percentage of Australian tourism of business** |
| --- | --- |
| New South Wales | 32.8% |
| Victoria | 30.8% |
| Queensland | 18.1% |
| Western Australia | 8.7% |
| South Australia | 5.6% |
| Tasmania | 1.9% |
| ACT | 1.3% |
| Northern Territory | 0.7% |

## 6.3 Change in business category - key states

* Victoria noted strong growth in the medium business category of 21.0% as at June 2023 compared to June 2022, well above the national growth rate of 13.3% in this business sector.
* Victoria noted a marginal increase in small (+1.7%) business numbers, above the growth in this category for New South Wales (+0.1%) and nationally (+1.2%).
* Large tourism businesses also increased in Victoria (+2.0%), although grew at a stronger rate in Queensland (+10.2%) and New South Wales (+6.9%).
* Victoria noted a decline in the non-employing business category of 3.8%, reflecting tougher trading conditions for small enterprises which are more vulnerable to market fluctuations.
* Nationally, there was only a slight increase in non-employing business types of 0.3% in June 2023 compared to June 2022.

## 6.4 Data table: change in volume of business types from June 2022 to June 2023 in key states and nationally

| **Business size** | **Victoria** | **New South Wales** | **Queensland** | **Australia** |
| --- | --- | --- | --- | --- |
| Non-employing | Decreased by 3.8% | Increased by 2.4% | Increased by 3.1% | Increased by 0.3% |
| Micro (1-4 employees) | Decreased by 9.8% | Decreased by 7.1% | Decreased by 5.9% | Decreased by 7.7% |
| Small (5-19 employees) | Increased by 1.7% | Increased by 0.1% | Increased by 2.0% | Increased by 1.2% |
| Medium (20-199 employees) | Increased by 21.0% | Increased by 8.0% | Increased by 14.0% | Increased by 13.3% |
| Large (200 employees) | Increased by 2.0% | Increased by 6.9% | Increased by 10.2% | Increased by 5.9% |

# 7.0 Tourism businesses by city

* In June 2023, Melbourne had the most tourism related businesses of any city in Australia (79,993 businesses), reinforcing the importance of the industry to Melbourne’s economy.
* This was followed by Sydney with 78,002 businesses. Brisbane was well behind this volume with 30,100 businesses, while Perth was ranked fourth with 25,058 tourism businesses.

## 7.1 Data table: volume of tourism businesses by city for non-employing and employing business types

| **City** | **Employing** | **Non-employing** | **Total** |
| --- | --- | --- | --- |
| Melbourne | 35,900 | 44,093 | 79,993 |
| Sydney | 39,227 | 38,775 | 78,002 |
| Brisbane | 15,224 | 14,876 | 30,100 |
| Perth | 12,665 | 12,393 | 25,058 |
| Adelaide | 7,410 | 6,957 | 14,367 |
| Gold Coast  | 5,621 | 5,490 | 11,111 |
| Canberra | 2,669 | 1,973 | 4,642 |
| Hobart | 1,919 | 1,619 | 3,538 |
| Darwin  | 942 | 778 | 1,720 |

# 8.0 Tourism businesses in Melbourne and regional Victoria

* The largest business type in both Melbourne and regional Victoria was the non-employing category.
* Regional Victoria noted a slight increase (+0.3%) in business entrants in this category in June 2023 compared to June 2022, while Melbourne noted a decline (-4.9%).
* Both Melbourne (-10.7%) and regional Victoria (-7.4%) also noted declines in the micro business category reflecting the negative impacts of economic headwinds on small scale business operations.
* In comparison, medium sized businesses increased at a strong double-digit rate in both Melbourne (+23.9%) and regional Victoria (+15.2%).

## 8.1 Data table: volume of tourism businesses in Melbourne and regional Victoria by business type

| **Business type** | **Melbourne** | **Regional Victoria** |
| --- | --- | --- |
| Non-employing | 44,093 | 13,116 |
| Micro (1-4 employees) | 22,036 | 9,133 |
| Small (5-19 employees) | 10,687 | 5,765 |
| Medium (20-199 employees) | 3,062 | 1,446 |
| Large (200 employees) | 115 | 142 |

## 8.2 Data table: percentage change in tourism businesses from June 2022 to June 2023 in Melbourne and regional Victoria by business type

| **Business type** | **Melbourne** | **Regional Victoria** |
| --- | --- | --- |
| Non-employing | Decreased by 4.9% | Increased by 0.3% |
| Micro (1-4 employees) | Decreased by 10.7% | Decreased by 7.4% |
| Small (5-19 employees) | Increased by 1.5% | Increased by 2.1% |
| Medium (20-199 employees) | Increased by 23.9% | Increased by 15.2% |
| Large (200 employees) | Increased by 4.5% | Unchanged  |

## 8.3 Melbourne key results

Both Melbourne and regional Victoria noted the strongest growth compared to June 2022 in the medium business category, with some new entrants also noted in small sized operations.

There were 35,900 employing businesses in Melbourne in June 2023 which was 1,877 less or a decline of 5.0% compared to June 2022.

* Micro businesses (1-4 employees) in Melbourne decreased by 10.7%.
* Small businesses (5-19 employees) increased by 1.5%.
* Medium businesses (20-199 employees) increased by 23.9%.
* Large businesses (200+ employees) increased by 4.5%.

There were 44,093 non-employing tourism businesses in Melbourne which was 2,281 less or a decline of 4.9% compared to June 2022.

* Most major Australian cities noted modest increases in in non-employing businesses between June 2022 and June 2023 including Hobart (+5.5%), Gold Coast (+5.0%), Canberra (+4.8%), Sydney (+2.3%), Brisbane (+1.7%), Perth (+1.4%), Darwin (+1.2%) and Adelaide (+1.0%).

## 8.4 Regional Victoria key results

There were 16,486 employing businesses in regional Victoria in June 2023 which was 426 less or a decline of 2.5% compared to June 2022.

* Micro businesses (1-4 employees) in regional Victoria decreased by 7.4%.
* Small businesses (5-19 employees) increased by 2.1%.
* Medium businesses (20-199 employees) increased by 15.2%.
* Large businesses (200+ employees) were unchanged.

There were 13,116 non-employing tourism businesses in regional Victoria which was 44 more or an increase of 0.3% compared to June 2022.

* Most regional areas noted marginal growth in non-employing businesses except for regional TAS (-0.6%).
* The highest growth was in regional QLD (+4.0%), followed by regional WA (+3.0%), regional NSW (+2.7%), regional SA (+2.0%) and regional NT (+0.7%).

# 9.0 Victoria’s tourism regions

* The Yarra Valley and Dandenong Ranges had the most tourism businesses in regional Victoria in June 2023, with 3,937 businesses, with most in the non-employing category at 52%.
* This was followed by Mornington Peninsula with 3,924 businesses and the Murray with 3,867 businesses.
* Phillip Island had the smallest volume of tourism businesses at 618, which reflects its small geographic size.

## 9.1 Data table: tourism businesses by region for employing, non-employing and total business types

| **Region** | **Employing** | **Non-employing** | **Total** |
| --- | --- | --- | --- |
| Yarra Valley and Dandenong Ranges | 1,901 | 2,036 | 3,937 |
| Mornington Peninsula | 2,089 | 1,835 | 3,924 |
| Murray | 2,258 | 1,609 | 3,867 |
| Geelong Bellarine | 1,888 | 1,740 | 3,628 |
| Goldfields | 1,997 | 1,535 | 3,532 |
| Gippsland | 1,788 | 1,200 | 2,988 |
| GOR | 1,372 | 845 | 2,217 |
| High Country | 1,103 | 761 | 1,864 |
| Daylesford and Macedon Ranges | 743 | 676 | 1,419 |
| Grampians | 665 | 413 | 1,078 |
| Phillip Island | 364 | 254 | 618 |

## 9.2 Tourism businesses by region for employing, non-employing and total business types

Most of Victoria’s tourism regions noted a decline in the number of tourism businesses as at June 2023 compared to June 2022, reflecting tougher business conditions in the face of broader economic headwinds.

Total businesses:

* Only two tourism regions noted a marginal increase in total tourism related businesses in June 2023 compared to June 2022 reflecting negative trading conditions including Daylesford and Macedon Ranges (9 more businesses or an increase of 0.6%) and Goldfields (5 more businesses or an increase of 0.1%).
* The most business exits were noted in the Mornington Peninsula (102 less businesses or a decrease of 2.5%) and Gippsland (101 less businesses or a decrease of 3.3%).

Non-employing businesses vs employing businesses:

* Overall regional Victoria noted a 0.3% increase in non-employing business types with the largest gains noted in Victoria’s High Country (29 more businesses or an increase of 4.0%) and Daylesford and Macedon Ranges (22 more businesses or an increase pf 3.4%).
* Regional Victoria noted a decline in employing businesses in June 2023 compared to June 2022 (-426 businesses or -2.5%), with the largest decrease noted in Mornington Peninsula (-96 businesses or -4.4%), followed by Gippsland (-72 businesses or -3.9%).

## 9.3 Data table: change in tourism businesses from June 2022 to June 2023 in Victoria’s tourism regions

| **Region** | **Percentage change in total from June 2022 to June 2023** |
| --- | --- |
| Daylesford and the Macedon Ranges | Increased by 0.6% |
| Goldfields | Increased by 0.1% |
| Victoria's High Country | Decreased by 0.2% |
| Great Ocean Road | Decreased by 0.5% |
| Phillip Island | Decreased by 0.8% |
| Murray | Decreased by 1.2% |
| Yarra Valley and Dandenong Ranges | Decreased by 1.3% |
| Geelong and the Bellarine | Decreased by 1.8% |
| Mornington Peninsula | Decreased by 2.5% |
| Gippsland | Decreased by 3.3% |
| Grampians | Decreased by 4.2% |

# 10.0 Change in tourism businesses from June 2023 compared to June 2018

Over the longer term (June 2023 compared to June 2018) Victoria has outperformed other Australian states in creating more tourism businesses, reinforcing the resilience of the industry despite various challenges, although this pattern has reversed in the most recent year.

* Victoria experienced the highest growth in total businesses from June 2018 to June 2023 (+22.1%), above the national average (+13.1%) and outperforming New South Wales (+8.7%), and Queensland (+11.6%).
* In Victoria growth was driven by the non-employing category (+31.6%) with double-digit growth also noted in medium (+18.6%), small (+16.2%) and micro (+11.1%) businesses with more moderate growth in large (+2.4%) business types.
* Melbourne experienced strong growth in total businesses (+24.9%) over the five-year period, the strongest growth of all the major cities. Growth in Melbourne was driven by a large increase in non-employing businesses (+34.5%), with high growth noted in medium (+18.0%), small (+16.4%), large (+15.0%) and micro (+13.6%) business types.
* Regional Victoria experienced softer growth than Melbourne for total businesses (+15.3%). This was driven by high growth in non-employing businesses (+23.0%), with strong growth also noted in medium (+19.7%), small (+15.6%) and micro (+5.5%) businesses, with a decline in large (-6.0%) business types over the five-year period.

## 10.1 Data table: change in total tourism related businesses in key competitor states (June 2023 vs June 2018)

| **State** | **Percentage change in total from June 2022 to June 2023** |
| --- | --- |
| Victoria | Increased by 22.1% |
| New South Wales | Increased by 8.7% |
| Queensland | Increased by 11.6% |
| South Australia | Increased by 8.9% |

## 10.2 Data table: change in total tourism related businesses in key competitor cities (June 2023 vs June 2018)

| **City** | **Percentage change in total from June 2022 to June 2023** |
| --- | --- |
| Melbourne | Increased by 24.9% |
| Sydney | Increased by 8.7% |
| Brisbane | Increased by 12.6% |
| Gold Coast | Increased by 16.5% |
| Adelaide | Increased by 10.7% |

## 10.3 Data table: change in total tourism related businesses in regional areas (June 2023 vs June 2018)

| **Region** | **Percentage change in total from June 2022 to June 2023** |
| --- | --- |
| Regional Victoria | Increased by 15.3% |
| Regional New South Wales | Increased by 8.9% |
| Regional Queensland | Increased by 8.1% |
| Regional South Australia | Increased by 4.5% |

# 11.0 Detailed data tables

## 11.1 Data table: volume of tourism business in Victoria by industry type and business size in June 2023

| **Industry type** | **Micro (1-4 employees)** | **Small (5-19 employees)** | **Medium (20-199 employees)** | **Large (200+ employees)** |
| --- | --- | --- | --- | --- |
| Tourism characteristic industries |  |  |  |  |
| Accommodation | 1,011 | 551 | 189 | 9 |
| Cafes, restaurants and takeaway food services | 9,861 | 7,118 | 1,708 | 83 |
| Clubs, pubs, taverns and bars | 639 | 752 | 511 | 0 |
| Rail transport | 3 | 0 | 3 | 3 |
| Taxi transport | 319 | 31 | 10 | 3 |
| Air and space, water and other transport | 324 | 78 | 34 | 6 |
| Motor vehicle hiring | 171 | 31 | 8 | 0 |
| Travel agency and tour operator services | 809 | 104 | 35 | 0 |
| Cultural services | 964 | 175 | 67 | 3 |
| Casinos and other gambling services | 201 | 79 | 12 | 3 |
| Other sports and recreation services | 1,469 | 814 | 235 | 32 |
| Total tourism characteristic industries | 15,771 | 9,733 | 2,812 | 142 |
| Tourism connected industries |  |  |  |  |
| Automotive fuel retailing | 283 | 278 | 58 | 4 |
| Other retail trade | 15,115 | 6,439 | 1,640 | 108 |
| Total tourism connected industries | 15,398 | 6,717 | 1,698 | 112 |
| **Total tourism related industries** | **31,169** | **16,452** | **4,508** | **257** |
| Size & type % of Total | 28% | 15% | 4% | 0.2% |

## 11.2 Data table: volume of tourism business in Victoria by industry type for employing and non-employing business types in June 2023

| **Industry type** | **Total employing** | **Non-employing** | **Total** | **Industry percentage of total** |
| --- | --- | --- | --- | --- |
| Tourism characteristic industries |  |  |  |  |
| Accommodation | 1,760 | 1,782 | 3,542 | 3% |
| Cafes, restaurants and takeaway food services | 18,770 | 6,987 | 25,757 | 24% |
| Clubs, pubs, taverns and bars | 1,902 | 704 | 2,606 | 2% |
| Rail transport | 9 | 13 | 22 | 0% |
| Taxi transport | 363 | 14,067 | 14,430 | 13% |
| Air and space, water and other transport | 442 | 1,034 | 1,476 | 1% |
| Motor vehicle hiring | 210 | 836 | 1,046 | 1% |
| Travel agency and tour operator services | 948 | 1,418 | 2,366 | 2% |
| Cultural services | 1,209 | 5,122 | 6,331 | 6% |
| Casinos and other gambling services | 295 | 196 | 491 | 0% |
| Other sports and recreation services | 2,550 | 1,850 | 4,400 | 4% |
| Total tourism characteristic industries | 28,458 | 34,009 | 62,467 | 57% |
| Tourism connected industries |  |  |  |  |
| Automotive fuel retailing | 623 | 303 | 926 | 1% |
| Other retail trade | 23,302 | 22,897 | 46,199 | 42% |
| Total tourism connected industries | 23,925 | 23,200 | 47,125 | 43% |
| **Total tourism related industries** | **52,386** | **57,209** | **109,595** | **100%** |
| Size & type % of Total | 48% | 52% | 100% |  |

## 11.3 Data table: change in volume of tourism business in Victoria by industry type compared to 2022 and 2019

| **Industry type** | **Volume change2022 vs 2023** | **Percentage change2022 vs 2023** | **Volume change2019 vs 2023** | **Percentage change2019 vs 2023** |
| --- | --- | --- | --- | --- |
| Tourism characteristic industries |  |  |  |  |
| Accommodation | Decreased by 203  | Decreased by 5.4% | Increased by 121  | Increased by 3.5% |
| Cafes, restaurants and takeaway food services | Decreased by 548  | Decreased by 2.1% | Increased by 3,043  | Increased by 13.4% |
| Clubs, pubs, taverns and bars | Unchanged | Unchanged | Increased by 372  | Increased by 16.7% |
| Rail transport | Increased by 1  | Increased by 4.8% | Decreased by 5  | Decreased by 18.5% |
| Taxi transport | Decreased by 2,178  | Decreased by 13.1% | Increased by 176  | Increased by 1.2% |
| Air and space, water and other transport | Decreased by 99  | Decreased by 6.3% | Increased by 130  | Increased by 9.7% |
| Motor vehicle hiring | Increased by 21  | Increased by 2.0% | Increased by 390  | Increased by 59.5% |
| Travel agency and tour operator services | Decreased by 70  | Decreased by 2.9% | Increased by 78  | Increased by 3.4% |
| Cultural services | Decreased by 20  | Decreased by 0.3% | Increased by 1,465  | Increased by 30.1% |
| Casinos and other gambling services | Increased by 5  | Increased by 1.0% | Increased by 38  | Increased by 8.4% |
| Other sports and recreation services | Decreased by 105  | Decreased by 2.3% | Increased by 657  | Increased by 17.6% |
| Total tourism characteristic industries | Decreased by 3,196  | Decreased by 4.9% | Increased by6,465 | Increased by 11.5% |
| Tourism connected industries |   |   |   |   |
| Automotive fuel retailing | Increased by 43  | Increased by 4.9% | Increased by 33  | Increased by 3.7% |
| Other retail trade | Decreased by 1,387  | Decreased by 2.9% | Increased by 7,731  | Increased by 20.1% |
| Total tourism connected industries | Decreased by 1,344 | Decreased by 2.8% | Increased by7,764 | Increased by 19.7% |
| **Total tourism related industries** | **Decreased by 4,540**  | **Decreased by 4.0%** | **Increased by 14,227**  | **Increased by 14.9%** |

##

## 11.4 Data table: volume of tourism business by region and business size in June 2023

Regions noted in italics in the table below are sub-regions of Victorian tourism regions

| **Region** | **Micro (1-4 employees)** | **Small (5-19 employees)** | **Medium (20-199 employees)** | **Large (200+ employees)** |
| --- | --- | --- | --- | --- |
| Melbourne | 22,036  | 10,687  | 3,062  | 115  |
| Geelong and the Bellarine | 981  | 708  | 188  | 11  |
| Great Ocean Road | 702  | 524  | 146  | 0 |
| *Mallee* | 374  | 248  | 52  | 0 |
| *Goulburn* | 444  | 272  | 57  | 3  |
| *Central Murray* | 311  | 203  | 44  | 2  |
| *Murray East* | 128  | 89  | 29  | 2  |
| Murray | 1,257  | 812  | 182  | 7  |
| Yarra Valley and Dandenong Ranges | 1,154  | 601  | 142  | 4  |
| Mornington Peninsula | 1,210  | 713  | 161  | 5  |
| *Gippsland* | 799  | 442  | 116  | 3  |
| *Lakes* | 224  | 169  | 34  | 1  |
| Gippsland | 1,023  | 611  | 150  | 4  |
| *Ballarat* | 509  | 332  | 98  | 4  |
| *Bendigo Loddon* | 549  | 401  | 103  | 1  |
| Goldfields | 1,058  | 733  | 201  | 5  |
| Victoria's High Country | 626  | 388  | 86  | 3  |
| *Central Highlands* | 124  |  66  | 10  | 0 |
| *Western Grampians* | 175  | 126  | 20  | 0 |
| *Wimmera* | 103  | 36  |  5  | 0 |
| Grampians | 402  | 228  | 35  | 0 |
| *Macedon* | 328  | 190  | 36  | 0 |
| *Spa Country* |  97  | 77  | 15  | 0 |
| Daylesford and the Macedon Ranges | 425  | 267  | 51  | 0 |
| Phillip Island | 204  | 130  | 30  | 0 |
| Regional Victoria | 9,133  | 5,765  | 1,446  | 142  |
| **Total Victoria** | **31,169** | **16,452** | **4,508** | **257** |

To note: total Victoria estimates in this table do not match table 1 due to differences in the estimation approach for regions vs industries. 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.

## 11.4 Data table: volume of tourism business by region and employing, non-employing and total

Regions noted in italics in the table below are sub-regions of Victorian tourism regions

| **Region** | **Total employing** | **Non-employing** | **Total** | **% of total businesses in Victoria** |
| --- | --- | --- | --- | --- |
| Melbourne | 35,900  | 44,093  | 79,993  | 73.0% |
| Geelong and the Bellarine | 1,888  | 1,740  | 3,628  | 3.3% |
| Great Ocean Road | 1,372  | 845  | 2,217  | 2.0% |
| *Mallee* | 674  | 435  | 1,109  | 1.0% |
| *Goulburn* | 776  | 674  | 1,450  | 1.3% |
| *Central Murray* | 560  | 353  | 913  | 0.8% |
| *Murray East* | 248  | 147  | 395  | 0.4% |
| Murray | 2,258  | 1,609  | 3,867  | 3.5% |
| Yarra Valley and Dandenong Ranges | 1,901  | 2,036  | 3,937  | 3.6% |
| Mornington Peninsula | 2,089  | 1,835  | 3,924  | 3.6% |
| *Gippsland* | 1,360  | 920  | 2,280  | 2.1% |
| *Lakes* | 428  | 280  | 708  | 0.6% |
| Gippsland | 1,788  | 1,200  | 2,988  | 2.7% |
| *Ballarat* | 943  | 712  | 1,655  | 1.5% |
| *Bendigo Loddon* | 1,054  | 823  | 1,877  | 1.7% |
| Goldfields | 1,997  | 1,535  | 3,532  | 3.2% |
| Victoria's High Country | 1,103  | 761  | 1,864  | 1.7% |
| *Central Highlands* | 200  | 126  | 326  | 0.3% |
| *Western Grampians* | 321  | 193  | 514  | 0.5% |
| *Wimmera* | 144  | 94  | 238  | 0.2% |
| Grampians | 665  | 413  | 1,078  | 1.0% |
| *Macedon* | 554  | 525  | 1,079  | 1.0% |
| *Spa Country* | 189  | 151  | 340  | 0.3% |
| Daylesford and the Macedon Ranges | 743  | 676  | 1,419  | 1.3% |
| Phillip Island | 364  | 254  | 618  | 0.6% |
| Regional Victoria | 16,486  | 13,116  | 29,602  | 27.0% |
| **Total Victoria** | **52,386** | **57,209** | **109,595** | **100.0%** |

To note: total Victoria estimates in this table do not match table 1 due to differences in the estimation approach for regions vs industries. 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.

## 11.5 Data table: employing tourism business by region by volume in 2019, 2022 and 2023 and change from June 2022 to June 2023

Regions noted in italics in the table below are sub-regions of Victorian tourism regions

| **Region** | **2019** | **2022** | **2023** | **Volume changefrom 2022** | **Percentage changefrom 2022** |
| --- | --- | --- | --- | --- | --- |
| Melbourne |  31,897  |  37,777  |  35,900  | Decreased by 1,877 | Decreased by 5.0% |
| Geelong and the Bellarine |  1,675  |  1,937  |  1,888  | Decreased by 49  | Decreased by 2.5% |
| Great Ocean Road |  1,267  |  1,393  |  1,372  | Decreased by 21  | Decreased by 1.5% |
| *Mallee* |  657  |  693  |  674  | Decreased by 19  | Decreased by 2.7% |
| *Goulburn* |  717  |  785  |  776  | Decreased by 9  | Decreased by 1.1% |
| *Central Murray* |  532  |  577  |  560  | Decreased by 17  | Decreased by 2.9% |
| *Murray East* |  218  |  250  |  248  | Decreased by 2  | Decreased by 0.8% |
| Murray |  2,124  |  2,305  |  2,258  | Decreased by 47  | Decreased by 2.0% |
| Yarra Valley and Dandenong Ranges |  1,709  |  1,944  |  1,901  | Decreased by 43  | Decreased by 2.2% |
| Mornington Peninsula |  1,879  |  2,185  |  2,089  | Decreased by 96  | Decreased by 4.4% |
| *Gippsland* |  1,262  |  1,399  |  1,360  | Decreased by 39  | Decreased by 2.8% |
| *Lakes* |  419  |  461  |  428  | Decreased by 33  | Decreased by 7.2% |
| Gippsland |  1,681  |  1,860  |  1,788  | Decreased by 72  | Decreased by 3.9% |
| *Ballarat* |  816  |  930  |  943  | Increased by 13  | Increased by 1.4% |
| *Bendigo Loddon* |  1,015  |  1,074  |  1,054  | Decreased by 20  | Decreased by 1.9% |
| Goldfields |  1,831  |  2,004  |  1,997  | Decreased by 7  | Decreased by 0.3% |
| Victoria's High Country |  1,002  |  1,135  |  1,103  | Decreased by 32  | Decreased by 2.8% |
| *Central Highlands* |  180  |  208  |  200  | Decreased by 8  | Decreased by 3.8% |
| *Western Grampians* |  325  |  338  |  321  | Decreased by 17  | Decreased by 5.0% |
| *Wimmera* |  131  |  148  |  144  | Decreased by 4  | Decreased by 2.7% |
| Grampians |  636  |  694  |  665  | Decreased by 29  | Decreased by 4.2% |
| *Macedon* |  491  |  554  |  554  | Unchanged  | Unchanged |
| *Spa Country* |  174  |  202  |  189  | Decreased by 13  | Decreased by 6.4% |
| Daylesford and the Macedon Ranges |  665  |  756  |  743  | Decreased by 13  | Decreased by 1.7% |
| Phillip Island |  310  |  368  |  364  | Decreased by 4  | Decreased by 1.1% |
| Regional Victoria |  15,161  |  16,912  |  16,486  | Decreased by 426  | Decreased by 2.5% |
| **Total Victoria** |  **47,058**  |  **54,689**  |  **52,386**  | **Decreased by 2,303**  | **Decreased by 4.2%** |

To note: total Victoria estimates in this table do not match table 1 due to differences in the estimation approach for regions vs industries. 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.

## 11.6 Data table: non-employing tourism business by region by volume in 2019, 2022 and 2023 and change from June 2022 to June 2023

Regions noted in italics in the table below are sub-regions of Victorian tourism regions

| **Region** | **2019** | **2022** | **2023** | **Volume changefrom 2022** | **Percentage changefrom 2022** |
| --- | --- | --- | --- | --- | --- |
| Melbourne |  37,059  |  46,374  |  44,093  | Decreased by 2,281  | Decreased by 4.9% |
| Geelong and the Bellarine |  1,419  |  1,756  |  1,740  | Decreased by 16  | Decreased by 0.9% |
| Great Ocean Road |  774  |  835  |  845  | Increased by 10  | Increased by 1.2% |
| *Mallee* |  394  |  463  |  435  | Decreased by 28  | Decreased by 6.0% |
| *Goulburn* |  520  |  650  |  674  | Increased by 24  | Increased by 3.7% |
| *Central Murray* |  314  |  348  |  353  | Increased by 5  | Increased by 1.4% |
| *Murray East* |  125  |  147  |  147  | Unchanged  | Unchanged |
| Murray |  1,353  |  1,608  |  1,609  | Increased by 1  | Increased by 0.1% |
| Yarra Valley and Dandenong Ranges |  1,653  |  2,043  |  2,036  | Decreased by 7  | Decreased by 0.3% |
| Mornington Peninsula |  1,639  |  1,841  |  1,835  | Decreased by 6  | Decreased by 0.3% |
| *Gippsland* |  852  |  949  |  920  | Decreased by 29  | Decreased by 3.1% |
| *Lakes* |  282  |  280  |  280  | Unchanged  | Unchanged |
| Gippsland |  1,134  |  1,229  |  1,200  | Decreased by 29  | Decreased by 2.4% |
| *Ballarat* |  579  |  703  |  712  | Increased by 9  | Increased by 1.3% |
| *Bendigo Loddon* |  689  |  820  |  823  | Increased by 3  | Increased by 0.4% |
| Goldfields |  1,268  |  1,523  |  1,535  | Increased by 12  | Increased by 0.8% |
| Victoria's High Country |  667  |  732  |  761  | Increased by 29  | Increased by 4.0% |
| *Central Highlands* |  128  |  130  |  126  | Decreased by 4  | Decreased by 3.1% |
| *Western Grampians* |  198  |  206  |  193  | Decreased by 13  | Decreased by 6.3% |
| *Wimmera* |  104  |  95  |  94  | Decreased by 1  | Decreased by 1.1% |
| Grampians |  430  |  431  |  413  | Decreased by 18  | Decreased by 4.2% |
| *Macedon* |  415  |  502  |  525  | Increased by 23  | Increased by 4.6% |
| *Spa Country* |  144  |  152  |  151  | Decreased by 1  | Decreased by 0.7% |
| Daylesford and the Macedon Ranges |  559  |  654  |  676  | Increased by 22  | Increased by 3.4% |
| Phillip Island |  193  |  255  |  254  | Decreased by 1  | Decreased by 0.4% |
| Regional Victoria |  11,251  |  13,072  |  13,116  | Increased by 44  | Increased by 0.3% |
| **Total Victoria** |  **48,310**  |  **59,446**  |  **57,209**  | **Decreased by 2,237**  | **Decreased by 3.8%** |

To note: total Victoria estimates in this table do not match table 1 due to differences in the estimation approach for regions vs industries. 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.

## 11.7 Data table: total tourism business by region by volume in 2019, 2022 and 2023 and change from June 2022 to June 2023

Regions noted in italics in the table below are sub-regions of Victorian tourism regions

| **Region** | **2019** | **2022** | **2023** | **Volume changefrom 2022** | **Percentage changefrom 2022** |
| --- | --- | --- | --- | --- | --- |
| Melbourne |  68,956  |  84,151  |  79,993  | Decreased by 4,158  | Decreased by 4.9% |
| Geelong and the Bellarine |  3,094  |  3,693  |  3,628  | Decreased by 65  | Decreased by 1.8% |
| Great Ocean Road |  2,041  |  2,228  |  2,217  | Decreased by 11  | Decreased by 0.5% |
| *Mallee* |  1,051  |  1,156  |  1,109  | Decreased by 47  | Decreased by 4.1% |
| *Goulburn* |  1,237  |  1,435  |  1,450  | Increased by 15  | Increased by 1.0% |
| *Central Murray* |  846  |  925  |  913  | Decreased by 12  | Decreased by 1.3% |
| *Murray East* |  343  |  397  |  395  | Decreased by 2  | Decreased by 0.5% |
| Murray |  3,477  |  3,913  |  3,867  | Decreased by 46  | Decreased by 1.2% |
| Yarra Valley and Dandenong Ranges |  3,362  |  3,987  |  3,937  | Decreased by 50  | Decreased by 1.3% |
| Mornington Peninsula |  3,518  |  4,026  |  3,924  | Decreased by 102  | Decreased by 2.5% |
| *Gippsland* |  2,114  |  2,348  |  2,280  | Decreased by 68  | Decreased by 2.9% |
| *Lakes* |  701  |  741  |  708  | Decreased by 33  | Decreased by 4.5% |
| Gippsland |  2,815  |  3,089  |  2,988  | Decreased by 101  | Decreased by 3.3% |
| *Ballarat* |  1,395  |  1,633  |  1,655  | Increased by 22  | Increased by 1.3% |
| *Bendigo Loddon* |  1,704  |  1,894  |  1,877  | Decreased by 17  | Decreased by 0.9% |
| Goldfields |  3,099  |  3,527  |  3,532  | Increased by 5  | Increased by 0.1% |
| Victoria's High Country |  1,669  |  1,867  |  1,864  | Decreased by 3  | Decreased by 0.2% |
| *Central Highlands* |  308  |  338  |  326  | Decreased by 12  | Decreased by 3.6% |
| *Western Grampians* |  523  |  544  |  514  | Decreased by 30  | Decreased by 5.5% |
| *Wimmera* |  235  |  243  |  238  | Decreased by 5  | Decreased by 2.1% |
| Grampians |  1,066  |  1,125  |  1,078  | Decreased by 47  | Decreased by 4.2% |
| *Macedon* |  906  |  1,056  |  1,079  | Increased by 23  | Increased by 2.2% |
| *Spa Country* |  318  |  354  |  340  | Decreased by 14  | Decreased by 4.0% |
| Daylesford and the Macedon Ranges |  1,224  |  1,410  |  1,419  | Increased by 9  | Increased by 0.6% |
| Phillip Island |  503  |  623  |  618  | Decreased by 5  | Decreased by 0.8% |
| Regional Victoria |  26,412  |  29,984  |  29,602  | Decreased by 382  | Decreased by 1.3% |
| **Total Victoria** |  95,368  |  14,135  | 109,595  | Decreased by 4,540  | Decreased by 4.0% |

To note: total Victoria estimates in this table do not match table 1 due to differences in the estimation approach for regions vs industries. 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.

## 11.8 Data table: tourism businesses by size in June 2023 –key state and national comparisons

|  | **Micro 1-4 employees** | **Small 5-19 employees** | **Medium 20-199 employees** | **Large 200+ employees** | **Total employing** | **Non employing** | **Total** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Victoria | 31,169 | 16,452 | 4,508 | 257 | 52,386 | 57,209 | 109,595 |
| New South Wales | 37,118 | 19,404 | 5,155 | 342 | 62,019 | 54,674 | 116,693 |
| Queensland | 17,933 | 12,101 | 3,590 | 183 | 33,807 | 30,625 | 64,432 |
| Australia | 103,622 | 61,105 | 17,254 | 947 | 182,928 | 172,642 | 355,570 |

## 11.9 Data table: percentage change in businesses by size from June 2022 to June 2023 – key state and national comparisons

|  | **Micro 1-4 employees** | **Small 5-19 employees** | **Medium 20-199 employees** | **Large 200+ employees** | **Total employing** | **Non employing** | **Total** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Victoria | Decreased by 9.8% | Increased by 1.7% | Increased by 21.0% | Increased by 2.0% | Decreased by 4.2% | Decreased by 3.8% | Decreased by 4.0% |
| New South Wales | Decreased by 7.1% | Increased by 0.1% | Increased by 8.0% | Increased by 6.9% | Decreased by 3.8% | Increased by 2.4% | Decreased by 0.9% |
| Queensland | Decreased by 5.9% | Increased by 2.0% | Increased by 14.0% | Increased by 10.2% | Decreased by 1.2% | Increased by 3.1% | Increased by 0.8% |
| Australia | Decreased by 7.7% | Increased by 1.2% | Increased by 13.3% | Increased by 5.9% | Decreased by 3.1% | Increased by 0.3% | Decreased by 1.5% |

## 11.10 Data table: tourism businesses by size in June 2023 in Melbourne and regional Victoria

|  | **Micro 1-4 employees** | **Small 5-19 employees** | **Medium 20-199 employees** | **Large 200+ employees** | **Total employing** | **Non employing** | **Total** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Melbourne | 22,036 | 10,687 | 3,062 | 115 | 35,900 | 44,093 | 79,993 |
| Regional Victoria | 9,133 | 5,765 | 1,446 | 142 | 16,486 | 13,116 | 29,602 |
| Total Victoria | 31,169 | 16,452 | 4,508 | 257 | 52,386 | 57,209 | 109,595 |

## 11.11 Data table: percentage change in businesses by size from June 2022 to June 2023 in Melbourne and regional Victoria

|  | **Micro 1-4 employees** | **Small 5-19 employees** | **Medium 20-199 employees** | **Large 200+ employees** | **Total employing** | **Non employing** | **Total** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Melbourne | Decreased by 10.7% | Increased by 1.5% | Increased by 23.9% | Increased by 4.5% | Decreased by 5.0% | Decreased by 4.9% | Decreased by 4.9% |
| Regional Victoria | Decreased by 7.4% | Increased by 2.1% | Increased by 15.2% | Unchanged | Decreased by 2.5% | Increased by 0.3% | Decreased by 1.3% |
| Total Victoria | Decreased by 9.8% | Increased by 1.7% | Increased by 21.0% | Increased by 2.0% | Decreased by 4.2% | Decreased by 3.8% | Decreased by 4.0% |

# 12.0 Methodology and data notes

The data used to produce these business counts are extracted from the Australian Bureau of Statistics Business Register (ABSBR). The ABSBR is populated using administrative data from Australian Business Number (ABN) registrations recorded in the Australian Business Register (ABR), and business data from the Australian Taxation Office (ATO).

For the purposes of this report, a business is defined as a legal entity engaging in productive activity and/or other forms of economic activity in the market sector. Businesses are defined as engaging in productive activity where they have a Goods and Services Tax (GST) role and are actively remitting GST through Business Activity Statements (BAS).

Counts of businesses in this release include only actively trading businesses in the Australian market sector through to end June 2023.

Actively trading businesses are:

* ABNs from the non-profiled population that are actively remitting Goods and Services Tax (GST) – most of the businesses in the ABSBR are in this group and most have simple structures that are suitable for ABS statistical purposes at the ABN level. One ABN equates to one business.
* Types of Activity Unit (TAUs) from the profiled population – the small number of businesses/groups of businesses that are large, complex, and diverse and for which the ABS maintains its own economic unit structure.

Note: state and territory totals may be different from published estimates and from tables presented elsewhere due to rounding undertaken during the confidentialisation process.

For more detail, including National and State comparisons and time series, please refer to the report [Tourism Businesses in Australia, June 2023](https://www.tra.gov.au/en/economic-analysis/tourism-businesses), Tourism Research Australia, Canberra.

For more information about Victoria’s tourism regions refer to [Tourism Research Australia](https://www.tra.gov.au/en/regional/tourism-regions).

Factsheet produced by the Tourism and Events Research Unit, Victorian Government, Department of Jobs, Skills, Industry and Regions, April 2024.

Due care is taken in the production of this factsheet, however, DJSIR accepts no responsibility for use of this information. Data is considered correct at the time of publishing.