2018 LOCAL GOVERNMENT TOURISM HEALTH CHECK

RESEARCH REPORT

Victoria Tourism Industry Council

June 2018

Focused Thinking

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1.0 Executive Summary

Purpose of study

The purpose of the tourism health check for Victorian Local Governments is to assess the capacity of Councils to deliver sustainable tourism management objectives. This study compared the 2018 research with the data from previous studies conducted in 2013, 2010, 2008, 2005 and 2002 for the purpose of understanding key trends.

Methodology

This study is based on self-assessment by a nominated officer responsible for tourism within each Council. In this way, it is not an independent audit of capacity. At the commencement of the project, the Victoria Industry Tourism Council (VTIC) wrote to the Chief Executive Officer of each Council informing them of this study and requesting the appropriate contact person to whom the survey should be addressed.

For the 2018 study, 97% of Victorian Local Governments responded to the survey, which represented 77 Councils from a possible 79. This response rate is significantly higher than the previous year that this study has been undertaken (2013), which resulted in an 86% response from Local Government.

The core purpose of this study is to measure the capacity of Councils to deliver sustainable tourism management objectives. The capacity to successfully implement organisational objectives is reliant on sufficient internal and external coordination which can be managed and directed by the organisation (Hubbard, 2000). Uphoff (1986) recognised the need for Local Government to organise themselves to perform four fundamental functions:

- Decision making (planning and evaluation);
- Resource mobilisation and management;
- Communication and coordination; and
- Conflict resolution.

Performance of these functions indicated a capacity to implement Local Government objectives. This research assumes that capacity to implement sustainable tourism management objectives will also depend on the performance of these functions. The literature identified six areas where local government tourism structure may influence a Council's capacity to sustainably manage tourism. They were:

- Integration within Council (assuming high levels of integration reflect strong capacity);
- Possession of a strategic long term approach (assuming that such possession reflects strong capacity);
- Coordination of Council responsibilities with external stakeholders (assuming that high levels of coordination reflect strong capacity);
- Commitment to implementing strategic vision (assuming that high levels of commitment reflect strong capacity);
- Provision of adequate resources for sustainable tourism management (assuming that high commitment of resources reflects strong capacity);

- Overall level of involvement in tourism in the region (assuming that high levels of involvement reflect strong capacity).

In this year's study, as with the earlier studies, five capacity dimensions have been identified. These variables were split to identify respondents with assumed 'higher' capacity to manage tourism and respondents with assumed 'lower' capacity to do so. Geographic Information Systems (GIS) analysis was conducted on each of these, as well as the total number of 'lower' capacity groups each respondent fit.

Within this report, an additional level of analysis has been undertaken by grouping Councils by population size. The full list of Councils and populations can be seen in the appendices section of the report.

Note: - The description of GIS Atlas of Sustainable Tourism Management Capacity Indicators is taken from the Centre for Regional Research in 2008.

Results

Tourism's Priority Within Councils

In the 2018, Councils were asked whether tourism has remained the same, become less of, or become more of a priority for Councils in the past 3 years, relative to other priorities. Overall, 49% of Councils indicated that tourism has become more of a focus and 40% of Councils stated that tourism has remained a steady focus, therefore indicating that 88% of the respondents confirm that their Council holds tourism as a focus. The remaining 12% indicated that tourism has become less of a focus in the last 3 years.

Tourism Capacity

Councils, through self-evaluation, were assessed to determine capacity to deliver sustainable tourism management objectives across twenty key variables.

Overall, of the 63 Councils who responded to the survey in both 2013 and 2018 and completed more than 40% of the indicator questions, 38% recorded an increased level of capacity, 52% recorded a decreased level of capacity whilst the remaining 6% remained stable. This suggests that overall; the level of tourism capacity amongst Victorian Councils has diminished since 2013. The following table illustrates the overall tourism capacity levels in 2013 and 2018:

Capacity	2018	2013
Increased Capacity	38%	65%
Stable	6%	4%
Decreased Capacity	52%	31%

As outlined previously, there are 20 indicators of Sustainable Tourism Management Capacity that have been assessed within this study. The following table illustrates the % of indicators with 'higher' capacity, cross-tabulated by groupings based on population size: -

Population	% indicators reported with higher capacity	
	2018	2013
Group 1 - < 25,000	49.1%	54.8%
Group 2 - 25,001 - 50,000	45.4%	57.3%
Group 3 - 50,001 - 100,000	50.6%	47.3%
Group 4 - >100,001	39.2%	39.5%
Aggregate	**44.9%**	**49.8%**

In aggregate, Councils reported higher capacity for 44.9% of the tourism capacity indicators. This essentially means that Councils, on average, have higher capacity across 45% of the indicators contained within the model. It is worth noting though that larger Councils with populations over 100,001 recorded higher capacity in the least number of indicators than the smaller Councils. The data also suggests that capacity has decreased across Councils within each size grouping except those within the 50,000 – 100,000 group.

Provision of Adequate Resources by Council

Respondents were asked if they think that Council allocates sufficient money to tourism management. The results illustrate a decrease in the level of agreement from respondents this year, with 43% of respondents expressing agreement compared to 47% in 2013.

The following table illustrates the extent to which Councils agree that they allocate sufficient money to tourism management cross-tabulated by Council groupings based on population size:

Population	Agree	Disagree
Group 1 - < 25,000	39%	29%
Group 2 - 25,001 - 50,000	36%	29%
Group 3 - 50,001 - 100,000	22%	33%
Group 4 - >100,001	43%	27%
Aggregate 2018	**43%**	**31%**
Aggregate 2013	**47%**	**24%**

The 2018 results show a significant increase in the level of funds allocated to Local Government Tourism budgets. Across the Councils that responded, budgets ranged between $0 and $5,480,000 with the median budget being $401,000 and the mean budget being $723,900.

The following table illustrates the average Council budget for tourism related activities cross-tabulated by Council groupings based on population size: -

Population	Mean	Median
Group 1 - < 25,000	$513,365	$469,127
Group 2 - 25,001 - 50,000	$955,969	$768,245
Group 3 - 50,001 - 100,000	$774,833	$450,000
*Group 4 - >100,001	$841,342	$175,000
***Aggregate 2018**	**$723,900**	**$401,000**
Aggregate 2013	**$526,342**	**$357,000**

*It should be noted that there are a number of Councils within this grouping that are not tourism-focused in nature. It should also be noted that with nearly all Councils providing a response this year, there are an additional eleven Councils included in this analysis compared to the analysis undertaken in 2013.

Human resources continue to represent a substantial component of tourism budgets. Over the last four assessments, salaries have ranged between 41% and 48% of the total tourism budget. In 2018 the human resources made up 51% of Council budget allocated to tourism. Essentially this means that across all Councils, the salary component of tourism budgets has increased by 71% compared to 2013.

The following table illustrates the proportion of Council tourism budget spent on salaries cross-tabulated by Council groupings based on population size:

Population	Mean Tourism Budget	% Spent on Salaries	Total Spent on Salaries
Group 1 - < 25,000	$513,365	49.9%	$256,169
Group 2 - 25,001 - 50,000	$955,969	53.9%	$515,267
Group 3 - 50,001 - 100,000	$774,833	54.6%	$423,058
Group 4 - >100,001	$841,342	50.3%	$423,195
Aggregate 2018	**$723,900**	**51.0%**	**$369,189**
Aggregate 2013	**$526,342**	**41.0%**	**$215,800**

Integration of Tourism with other Council Functions

The 2018 survey revealed an overall decrease in agreement across the three indicators relating to the integration of tourism within the industry. 'Good coordination of tourism responsibilities within Council' decreased by 5%, 'Council & industry have shared tourism development vision' decreased by 3%, whilst 'Council's objectives match those of the industry' decreased by 8%.

In terms of tourism featuring in other internal Council plans, respondent Councils were firstly asked if tourism was identified on their Municipal Strategic Statement. Of the 75% of Councils who stated 'yes', the majority (70%) feature tourism on other internal Council plans. Economic Development Plans (42%) were the most likely to feature Tourism – also achieving an increase of 5% when compared to 2013. The proportion of Councils who have a Tourism Portfolio has fallen to 51% (down from 54% in 2013).

Strategic Planning for Tourism by Councils

In terms of the positioning of tourism within Councils, inclusion within an Economic Development Unit is the most common preference, as well as positioning tourism within a combined Tourism & Economic Development Unit.

There were decreases across all three indicators regarding the views of how well Council objectives deal with tourism. 'Clear tourism development objectives' experienced a 6% decline from the last assessment whilst the view that Council has accepted the concept of 'sustainable tourism management' decreased by 10% and the issue of sustainable tourism management also recorded a decrease, recording the lowest result of all the research years.

There was a positive change in the perception that Councils were 'most concerned with tourism's economic contribution'. This indicator assigns 'higher capacity' to those Councils for whom this is not the case, and so the decrease of 11% for 2018 signifies a positive change that Councils are less likely solely focused on economic contribution.

The following table illustrates the level of agreement (agree or strongly agree) with these three indicators cross-tabulated by Council groupings based on population size:

Population	Clear tourism development objectives	Council is most concerned with tourism's economic contribution	Council has accepted the concept of sustainable tourism
Group 1 - < 25,000	50%	54%	21%
Group 2 - 25,001 - 50,000	14%	57%	29%
Group 3 - 50,001 - 100,000	56%	22%	56%
Group 4 - >100,001	50%	57%	33%
Aggregate 2018	**50%**	**57%**	**34%**
Aggregate 2013	**56%**	**68%**	**44%**

> It is telling that the view of Council having 'clear tourism development objectives' has declined whilst Councils also appear to be diversifying their focus away from solely economic benefits. It may suggest that there is work to do to help pin down the benchmarks and key performance indicators that constitute a successful tourism plan, With half of the Councils reporting a lack of clarity over their tourism objectives, this may represent an opportunity to help provide guidance to Councils on this area

Plan Implementation by Councils

Over the last 16 years, Councils have reported a decreasing view that 'Council could do more to encourage Tourism Development'. In 2018 this percentage dropped to 57%, down 5% from 2013, which continues this optimistic trend.

The number of Councils that have a Tourism Strategy Plan however dropped to 55% from 63% in 2013. This result has fluctuated over time, but continues to exhibit a downward trend, which may be due to an increase in the presence of tourism in other plans.

The majority of Councils indicated that they undertake internal assessments and KPI measurements as their method of evaluating tourism objectives (88%). Amongst those Councils with a system for evaluating whether their Tourism objectives are being achieved, 64% said that they use 'KPI's' as their key method of evaluation, with 61% utilising an 'internal assessment' – both significant increases to the 2013 results. Overall in 2018, there were increases in nearly all the methods of evaluation, indicating that the Councils that implementing evaluation are using multiple methods to do so rather than just one.

It is interesting to note that the number of Councils with a defined 'Tourism Strategy Plan' fell whilst there was an increase in the 'measurement of KPI's to do with tourism objectives. This may suggest that Councils still retain a strategic outlook on their tourism objectives without the formal documentation of these objectives in a plan. Therefore the drop may not signify a reduction in tourism strategy at Council level, rather a change in the way that it is developed, communicated and measured

Relationship with External Stakeholders

Councils were asked whether they contribute to external tourism related organisations or committees in terms of financial support, staff time and other in-kind assistance. Councils recorded an increasing rate of support to Regional Tourism Boards with over 60% of the Councils doing so (up from 50% in 2013). Significant numbers of Councils also provide contributions to local tourism associations and to the Chamber of Commerce.

The external organisations that recorded the largest decline in Council support were Regional Tourism Associations (26% down from 44% in 2013) and Visitor Information Services (42% down from 51% in 2013). The increases to some external stakeholders appears to have been balanced by reductions in support to others, which may indicate continued changes in the tourism landscape where the incidence of engagement with Regional Tourism Boards is increasing in transference from other organisations or committees.

The following table illustrates the proportion of Councils that support each organisation and in which ways they provide support: -

Organisation	Proportion of Councils that support each organisation		How are these organisations supported by council?					
			Receive Financial Support		Receive Staff Support		Receive other in-kind Support	
	2013 (n=68)	**2018 (n=73)**	**2013**	**2018**	**2013**	**2018**	**2013**	**2018**
Regional Tourism Association	44%	26%	41%	21%	37%	19%	25%	8%
Local Tourism Association	46%	44%	40%	29%	38%	32%	26%	7%
Visitor Information Servicing	51%	42%	46%	32%	44%	30%	22%	11%
Regional Tourism Board	53%	62%	50%	58%	43%	38%	26%	22%
Chamber of Commerce	29%	41%	18%	23%	19%	27%	18%	8%
Business Tourism Association	25%	25%	22%	12%	19%	15%	13%	3%
Other	31%	22%	24%	8%	21%	14%	15%	5%

Whilst Visitor Information Services have experienced a decrease in support from Councils overall, this external tourism related organisation receives the highest financial assistance on average from Councils.

The following table illustrates the level of spend on external organisations and committees cross-tabulated by Council groupings based on population size:

Average spend on external tourism related organisations or committees

Population	Regional Tourism Assoc.	Local Tourism Assoc.	Visitor Information Centre	Regional Tourism Board	Chamber of Commerce	Business Tourism Assoc.
Group 1 - < 25,000	$13,667	$8,200	$208,101	$49,277	$35,813	$11,667
Group 2 - 25,001 - 50,000	$77,333	$82,143	$258,607	$143,834	$12,500	$20,000
Group 3 - 50,001 - 100,000	$20,000	$30,000	$230,000	$51,832	$141,667	$183,333
Group 4 - >100,001	$18,600	$916,667	$323,950	$253,343	$119,375	$5,000
Aggregate	**$28,467**	**$163,667**	**$243,973**	**$111,259**	**$71,412**	**$68,333**
Aggregate (excluding outlier)		**$36,850**				**$11,250**

The 2018 survey revealed decreases in agreement across the three indicators relating to Council objectives in dealing with tourism. Participating Councils were asked about the way Council dealt with tourism. Just over 53% of Councils agree that tourism is a priority industry in their Council. This was only a slight decrease from the 2013 result (56%). The view that 'Council works well with external tourism agencies' recorded a decrease of 6%, whilst the view that 'tourism operators are familiar with Council's role in tourism' had a significant decline from 44% to 30% in 2018.

The following table illustrates the level of agreement (agree or strongly agree) with these three indicators cross-tabulated by Council groupings based on population size:-

Population	Tourism is a priority in my Council	Council works well with external tourism organisations	Tourism operators are familiar with Council's role in tourism
Group 1 - < 25,000	58%	81%	42%
Group 2 - 25,001 - 50,000	50%	75%	17%
Group 3 - 50,001 - 100,000	58%	50%	14%
Group 4 - >100,001	50%	57%	30%
Aggregate 2018	**54%**	**66%**	**26%**
Aggregate 2013	**56%**	**74%**	**44%**

There appears to be a broad view that there is a disconnect between tourism operators and Council in terms of understanding how they fit together in providing tourism capacity. This may be something that required further investigation in order to ensure that the industry as a whole is benefiting from the effective leveraging of each party's assets

Summary

- Overall, of the 63 Councils who responded to the survey in 2018 and completed more than 40% of the indicator questions, the average capacity result was 48%. This essentially means that Councils, on average, have higher capacity across 48% of the indicators contained within the model. This was slightly lower than the 2013 result (50%).

When assessing capacity by Council size, it is clear that the smaller Councils report a higher level of overall capacity compared to the larger Councils. It is important to remember that this was a self-assessment survey and represented a subjective view.

- Overall, Council budgets for tourism appear to have increased since the previous assessment. Based on median figures taken from this study, after a slight drop in the growth in spending in the 2013 assessment, it appears that the upward trend of tourism spending by Councils has resumed. This is a shift from the period of stagnation reported between 2010 and 2013 (which may have also been symptomatic of the after effects of the Global Financial Crisis)
- In dollar terms, the level of spend on wages and salaries has increased significantly since 2013. Reinforcing this, there has been an increase in the average number of full time staff in 2018 from 3 to 5 across Victorian Councils. Due to a decrease in average number of casual staff, the average number of overall paid Council staff with tourism related responsibilities remained as 10 (incl. full time, part time and casual) in 2018.

- Overall, it appears that there has been growth in the variety and spread of the plans on which tourism is represented. There has been an increase in its presence on most plans, with growth in its presence within 'economic development plans', 'art/cultural plans, 'community development plans' and specific 'tourism plans'. Inclusion of tourism within the Economic Development Unit or within a Combined Tourism & Economic Development Unit continues to be the most common location of tourism within the Council structure in both metropolitan and regional Councils. The incidence of 'having no identified tourism unit or officer' in metropolitan Councils may relate to this growing trend of incorporating tourism into other departments.

Despite the fact that 88% of Councils consider tourism within their Council has either remained a focus or become more of a focus in the last 3 years, only 38% expressly include tourism in their overall Council plans. However, a growing number of Councils reported formal mechanisms for monitoring tourism strategy – albeit not necessarily from within a traditional, formal strategic plan

- The number of Councils that have a Tourism Strategy Plan dropped from 63% in 2013 to 55% in 2018, which is the lowest recorded result across all research years. The incidence of a Tourism Strategy Plan was slightly more likely amongst regional Councils than metropolitan Councils, with 57% of regional Councils indicating that they have a Tourism Strategy Plan, compared with only 52% of metropolitan Councils.

This decline may be explained by the reasons provided by Councils for not having a Tourism Strategy Plan, which most commonly referenced a tourism related plan being included as part of another broader plan, or within the RBT. Additionally, several Councils indicated that their current Tourism Strategy Plan has expired, and/or one is currently being drafted.

- Across all Councils, the indicators that recorded the largest proportion of 'higher' capacity were:
  - The presence of tourism on the municipal strategic statement – 70%
  - The presence of tourism on other Council plans – 63%
  - The view that Council works well with external tourism agencies – 62%
  - The presence of a tourism strategy/objective evaluation mechanism – 62%
  - The number of tourism volunteers exceeding 'none' – 61%
- Across all Councils, the indicators that recorded the largest proportion of 'lower' capacity were:
  - The view that Council is most (too) concerned with economic benefits – 80%
  - The view that Council could do more to encourage tourism development – 78%
  - The view that Council has accepted the concept of sustainable tourism management – 61%
  - The view that Council allocates sufficient money to tourism management – 53%
  - The incidence of tourism budget increasing since 2013– 52%

The view that Councils are too focused on the economic contribution that can be generated from tourism at the expense of the non-economic benefits continues to be a potential area for improvement. Whilst agreement with the proposition that Council is 'too focused' on economic contribution declined, the disagreement with this view remained low, indicating that many Councils are unsure as to whether they focus too heavily on tourism's economic benefit. It may be important to further understand this uncertainty, and whether the combination of tourism within economic or business-related departments is also the cause of tourism objectives becoming less clear.

2.0 Introduction

2.1 Background

Since 2002, Victoria Tourism Industry Council (VTIC), formerly Tourism Alliance Victoria, has commissioned research titled the 'Local Government Tourism Health Check'. The 'Local Government Tourism Health Check' aims to identify the current tourism capacity of Local Governments in Victoria. In 2018, IER Pty Ltd (IER) was commissioned by VTIC to conduct the survey and to provide a report that provided relevant comparisons to the 2002, 2006, 2008, 2010 and 2013 findings.

Where data was available, the charts and graphs in this study compare results to previous studies. The final section of this report provides the key capacity indicators illustrated through GIS mapping technology. Throughout the maps contained within this report, IER has identified both those Councils who did not return the survey (non-respondents) as well as those who provided a survey response but did not answer certain questions (NA/Question Not Answered). In total, 78 Councils responded to this survey in 2018 which compares to 68 in 2013, 65 in 2010, 72 in 2008, 62 in 2005 and 54 in 2002.

2.2 Research Objectives

The primary objective of the research was to identify Victorian Local Government tourism capacity in order for stakeholders to plan for, develop and manage tourism strategies and associated resources. To determine their current tourism capacity, Local Governments in Victoria were assessed using the Indictors of Sustainable Management of Tourism (ISMoT) model. This model is taken from the Centre for Regional Research in 2008, and whilst it is now ten years old, it is still considered to be a suitable model from which to undertake this type of assessment in the tourism sector.

The five indicators were:

- **Strategic Planning**: the characteristics of tourism policy in terms of: existence of a policy document; maintenance of the policy; evaluation protocols.
- **Implementation**: the characteristics of tourism objectives in terms of: existence of objectives; nature of objectives; lifespan of objectives; and evaluation protocols.
- **Integration within Council**: structure and positioning of the tourism unit in terms of location within Government structure; as well as the extent to which tourism is considered in other Government policy/strategy documents; and the existence of committee(s) within Government involving tourism unit staff.
- Coordination with **External Stakeholders** including other levels of Government and collaboration with tourism interests outside the Local Government area.
- Provision of adequate **Resources** to enable these tasks to be performed.

The tourism capacity of Local Victorian Governments in the previous 2002, 2005, 2008, 2010 and 2013 studies were compared to the current situation in 2018. Many of the results have also been presented using GIS mapping technology (as an appendix to this report).

2.3 Methodology

Prior to executing the survey, VTIC wrote to the Chief Executive Officer of each Council informing them of this study and requesting the appropriate contact person to whom the survey should be addressed. Subsequently, an invitation to complete the survey online was sent to the nominated Council contact

Prior to the 2008 study, a self-completion survey was sent to each of the Local Governments by post. However the 2008, 2010, 2013 and current studies were executed via an online research process. Under this approach, an email was sent inviting participants to complete the survey online by clicking on a link, which would take them directly to the survey.

Given the availability of email addresses, emailing participants a link to the survey, was considered a more effective method of data collection. Environmental sustainability was also a key reason for transferring the survey to an online methodology. As the survey still uses a self-completion method, it is possible to make comparisons to the research conducted in 2008, 2005 and 2002

Like previous years, follow up emails and calls were made in order to encourage response rates. Whilst the 2002, 2006 and 2008 studies were conducted in April, the 2010 study was conducted in July, the 2013 study was conducted during the months of July and August and the 2018 study was conducted in March, April and May.

2.4 Research Limitations

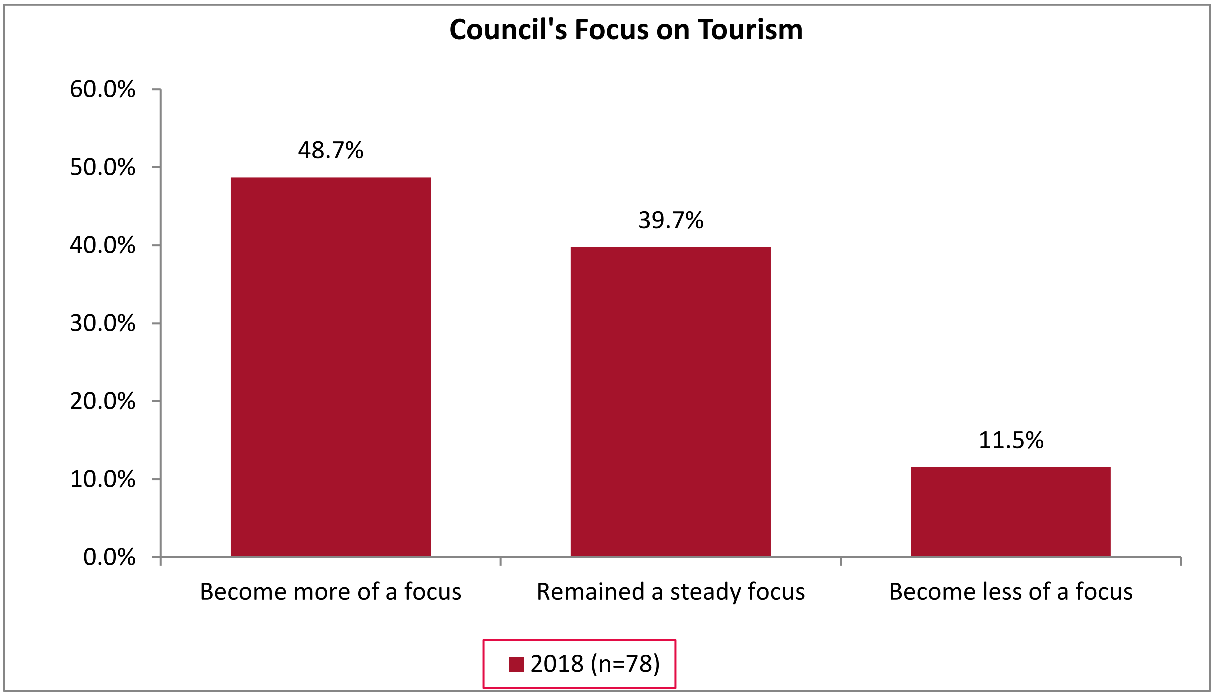
In 2010, IER took over the execution of this survey from a previously used research provider. For the most part, the 2013 and 2018 survey remained consistent with the previous surveys conducted in 2008 and 2010. As a result, direct comparisons are possible across most questions contained in the survey.

The high staff turnover in tourism has resulted in different people answering the 2002, 2006, 2008, 2010, 2013 and 2018 surveys. This, however, is something that cannot be controlled and the best way of minimise the potential impact of this issue is to maintain a consistent survey tool. It is also worth acknowledging that the survey responses in some cases may in fact be a representation of the individual respondent's perspective, rather than an organisation wide viewpoint.

3.0 Findings

3.1 Tourism as a priority for Council

In the 2018, Councils were asked whether tourism has remained the same, become less of, or become more of a priority for Councils in the past 3 years, relative to other priorities. Overall, 49% of Councils indicated that tourism has become more of a focus and 40% of Councils stated that tourism has remained a steady focus, therefore indicating that 88% of the respondents confirm that their Council holds tourism as a focus. The remaining 12% indicated that tourism has become less of a focus in the last 3 years.



Q1. Relative to other priorities, over the last three years, would you say tourism within your Council has:

There was no indication that the size of the Council is any indicator in whether the focus on tourism has increased or decreased. However, metropolitan Councils (16.7%) were twice as likely to have said that tourism had become less of a focus than regional Councils (8.3%).

Tourism as a priority for Council

Population	Become more of a focus	Remained a steady focus	Become less of a focus
Group 1 - < 25,000	57.1%	42.9%	0.0%
Group 2 - 25,001 - 50,000	53.8%	23.1%	23.1%
Group 3 - 50,001 - 100,000	50.0%	37.5%	12.5%
Group 4 - >100,001	37.9%	44.8%	17.2%
Aggregate	**48.7%**	**39.7%**	**11.5%**

Q1. Relative to other priorities, over the last three years, would you say tourism within your Council has:

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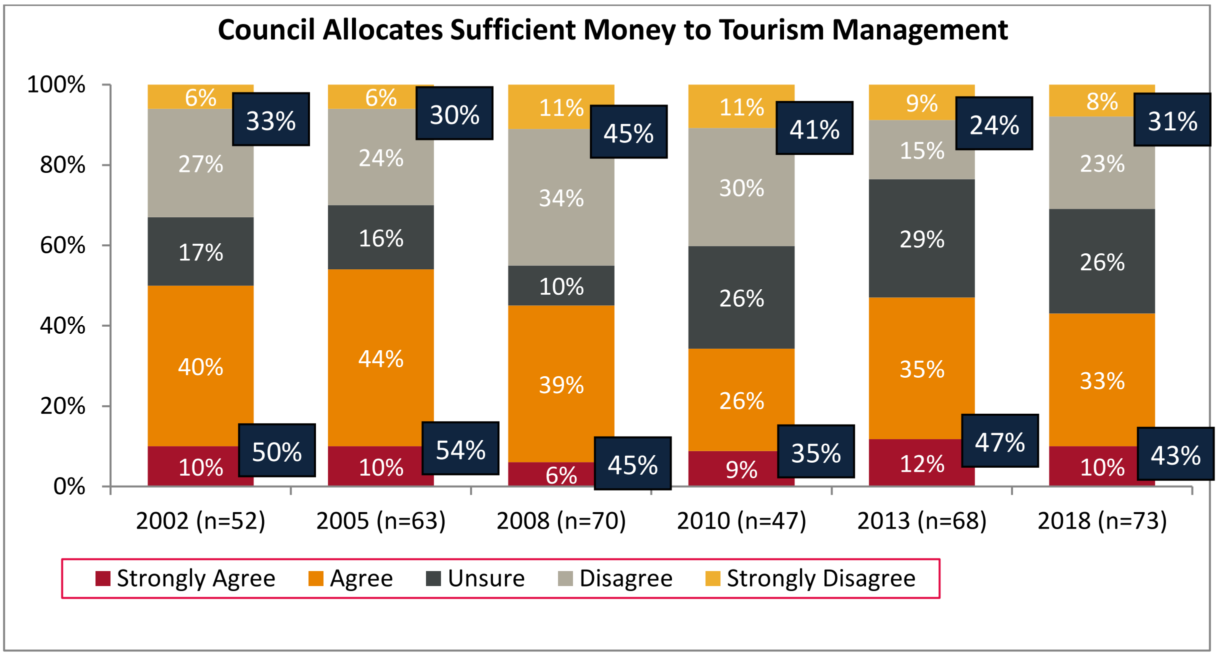
3.2 Provision of Adequate Resources by Councils

As part of measuring the resources capacity, respondents were asked to rate their Council's allocation of funds to tourism management and indicate the budget allocation to tourism and human resource allocation by Council.

3.2.1 Council Allocation of Money to Tourism Management

Respondents were asked if they think that their Council allocates sufficient money to tourism management. The results illustrate a decrease in the level of agreement from respondents from 2013 to 2018, with 43% of respondents expressing agreement compared to 47% in 2013. The percentage of respondents who either disagreed or strongly disagreed with the statement also rose slightly since the previous result in 2013, with 31% feeling this way about their Council allocating sufficient money to tourism. The level of uncertainty around this issue remains consistent with the previous two studies, with 26% of respondents this year indicating they did not know whether their Council allocates sufficient funds to tourism.



Q11. Please indicate how strongly you agree with the following statement? Council allocates sufficient money to tourism management.

3.2.2 Council Budgets

The 2018 results show growth in the level of funds allocated to Local Government tourism budgets. However this, in isolation, may be somewhat misleading due to the rising trend of tourism being incorporated into broader departments, resulting in reduced clarity of a specific tourism spend. Several Councils did not provide an answer to this question due to their tourism budget not being isolated (for example it shares a combined budget with marketing, or events), and this means that other Councils may have provided a budget figure that incorporates more than tourism specific expenditure.

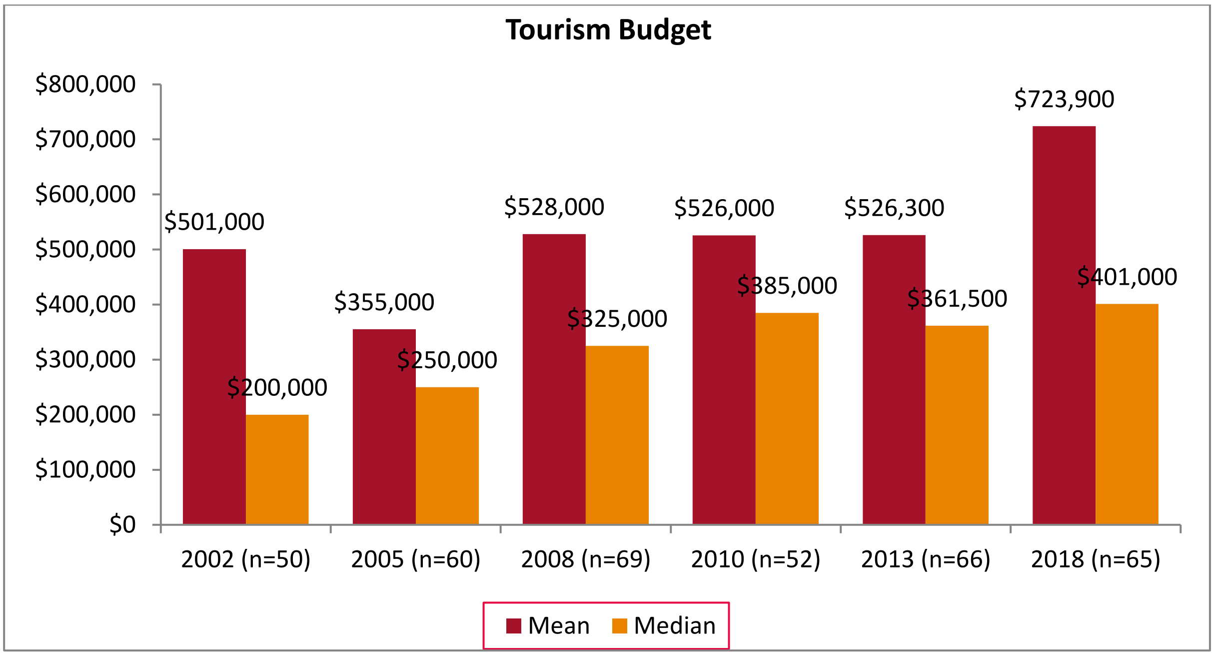
On average, Councils had a tourism budget that was 1.9% of their overall budget. This percentage was higher for regional Councils, who had a tourism budget of 2% of their overall budget on average, compared to metro councils (1.6%). Two councils recorded significantly higher tourism budgets (as a proportion of total budget). Excluding these two councils the overall average tourism budget is reduced to 1.1% of the overall Council budget.

When considering capacity, 45% of Councils reported having a tourism budget greater than 1% of their overall Council budget. These percentages were also significantly higher for regional Councils (69%) than for metro Councils (5%).

Across the Councils that responded, budgets ranged between $0 and $5,480,000 with the median budget being $401,000 and the mean budget being $723,900. For the purpose of comparison, the results in previous years were:-

- In 2013, the tourism budget ranged from $0 to $9,100,000 with the median budget being $361,500 and the mean budget being $526,300.
- In 2010, the tourism budget ranged from $2,000 to $2,100,000 with the median budget being $385,000 and the mean budget being $526,000.
- In 2008, the tourism budget ranged from $10,000 to $8,000,000 with the median budget being $325,000 and the mean budget $528,000.
- In 2005, the median budget was $250,000 and the mean budget was $355,000.
- In 2002, the median budget was $200,000 and the mean budget was $501,000.

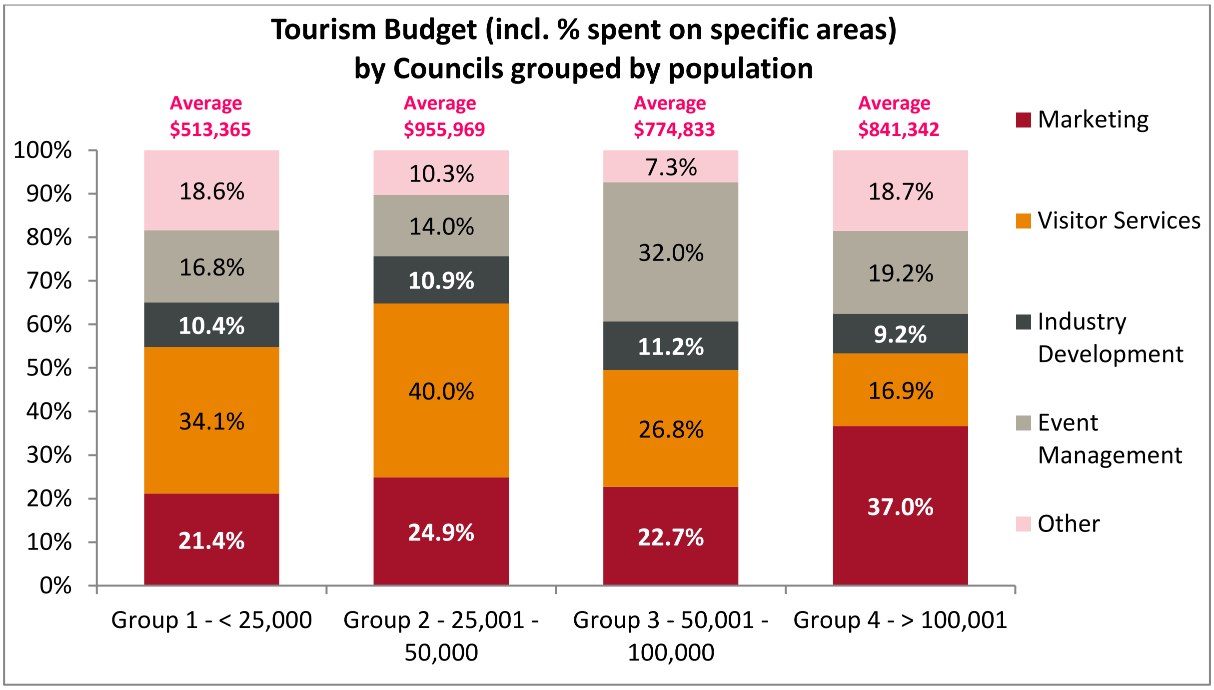
It is important to recognise that the results derived from this question are highly affected by both the number of Councils who completed the budget related questions as well as the composition of which Councils answered these survey questions. Furthermore, changes to the manner in which tourism is funded or positioned within Council can make it challenging to isolate the 'tourism related' budget in some Councils.



Q4. What was the Council budget allocation for tourism related activities (including staff salaries)?

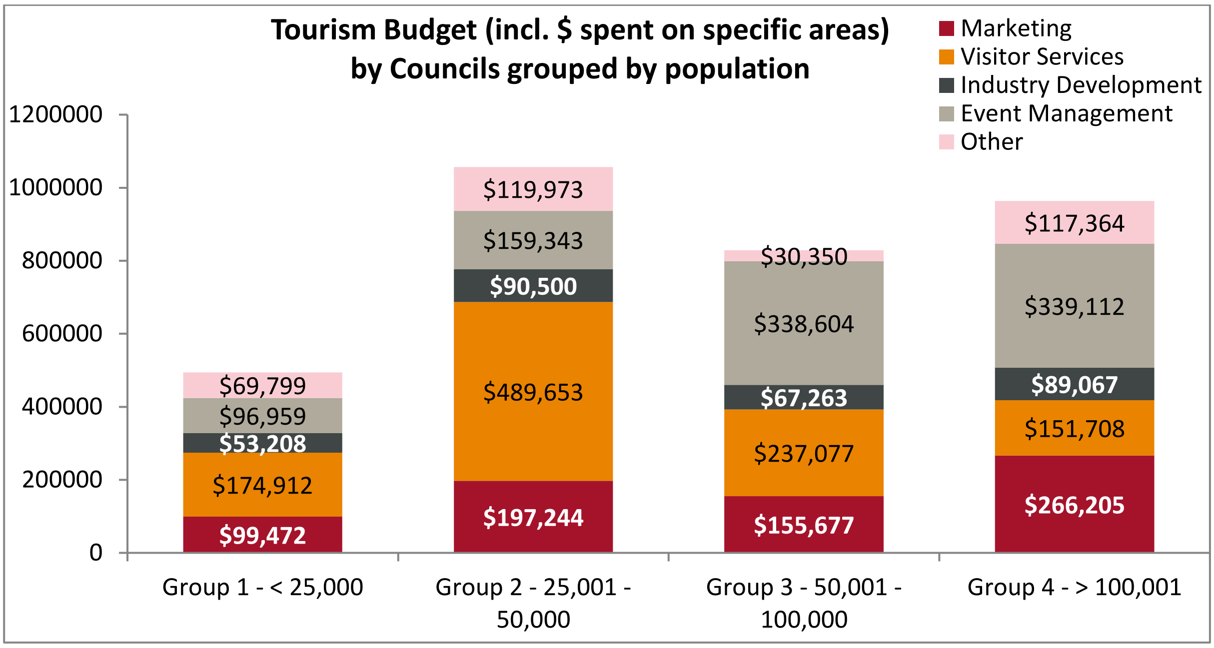
Considering the median figures in the chart above, after a slight drop in the growth in spending in the 2013 assessment, it appears that the upward trend of tourism spending by Councils has resumed. The mean shows a significant increase on previous years, but this figure may be affected by the increase in Council participation, which includes some larger Councils providing substantial budget figures that were not included previously as well as some Councils indicating that tourism is aggregated with other activities and as such does not have a singularly defined budget.

The chart below illustrates the average tourism budget and where that budget is spent when cross-tabulated against Councils grouped by population size.



Q4. What was the Council budget allocation for tourism related activities (including staff salaries)?

It shows that visitor services draw a larger proportion of expenditure amongst the smaller sized Councils, whereas marketing draws the larger proportion of expenditure amongst the bigger sized Councils. This was a similar result to the previous findings in 2013. Note, for the purpose of this analysis, salaries are included within the specific expense area in which they are incurred (i.e. marketing or visitor services). The results also show that event management draws a significantly larger portion of the tourism budget amongst the Councils within the middle range of population between 50,001-100,000. The chart below illustrates the same information, but in dollar terms:-



Q4. What was the Council budget allocation for tourism related activities (including staff salaries)?

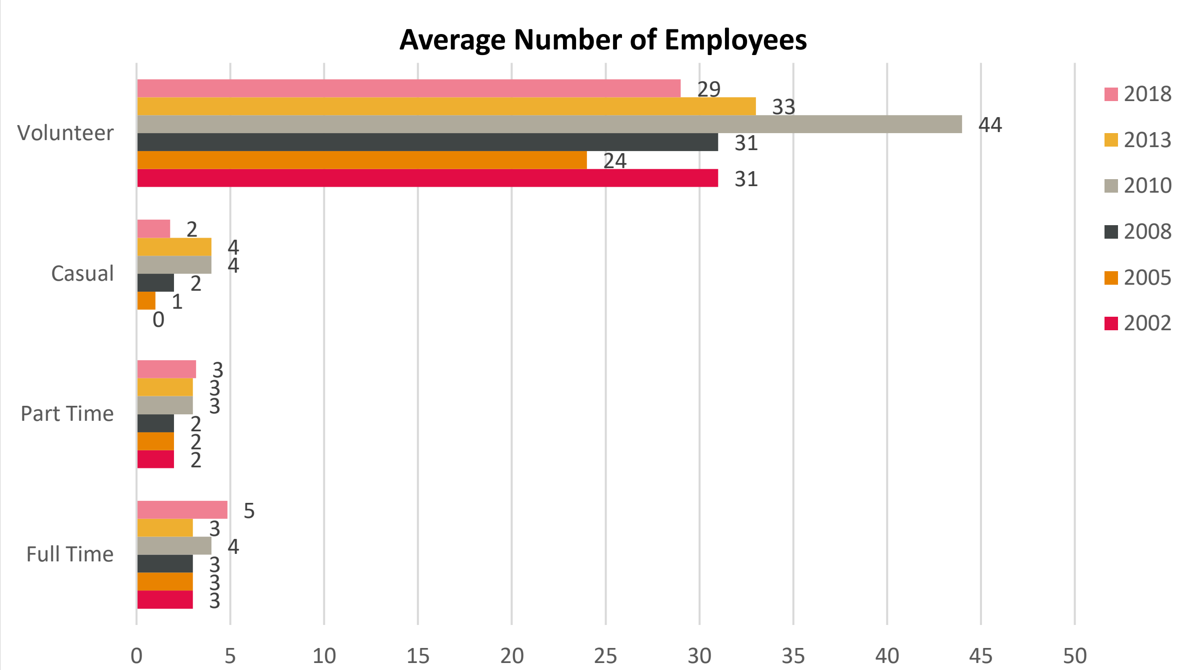
3.2.3 Human Resources

Human resources continue to represent a substantial proportion of tourism budgets. The following table illustrates the proportion of tourism budget allocated to salaries:-

YEAR	Average Tourism Budget	% Spent on Salaries	Total Spent on Salaries	% change on Previous Assessment
2005	$355,000	43%	$152,650	-
2008	$528,000	43%	$227,040	48.7%
2010	$526,000	48%	$252,480	11.2%
2013	$526,300	41%	$212,625	-15.8%
2018	$723,900	51%	$369,189	73.6%

In dollar terms, the level of spend on wages and salaries has increased significantly since a fall in 2013 and is also the highest recorded spend across the years of the study. Aligning with this increase is the rise of the average number of full time staff in 2018 from 3 to 5 across Victorian Councils.

The average number of paid Council staff with tourism related responsibilities was 10 (incl. full time, part time and casual) in 2018, which was consistent with the result in 2013. Despite a rise in the number of full-time staff on average, there was a decrease in the average number of casual staff. Volunteers continue to represent a significant component of the tourism workforce for Local Government. Across all Councils, just over 65% indicated that they relied on volunteers. This is relatively consistent with each assessment apart from the 2010 study where, 81% of Councils indicated they had tourism related volunteers. The average number of volunteers was 29, but a few Councils indicated they had more than 100 volunteers.



Q3. How many people are currently employed by your Council with tourism related responsibilities?

The following table illustrates the average number of paid and volunteer staff cross-tabulated by Council groupings based on population size:

Population	Paid Staff (incl. F/T, P/T & Casual)	Volunteer Staff
Group 1 - < 25,000	8	30
Group 2 - 25,001 - 50,000	10	25
Group 3 - 50,001 - 100,000	8	12
Group 4 - >100,001	11	32
Aggregate 2018	**10**	**29**
Aggregate 2013	**10**	**33**

3.3 Integration of Tourism with other Council Functions

Since 2002, a variety of factors have been considered to determine the extent to which tourism has been integrated with other Council functions. These include:-

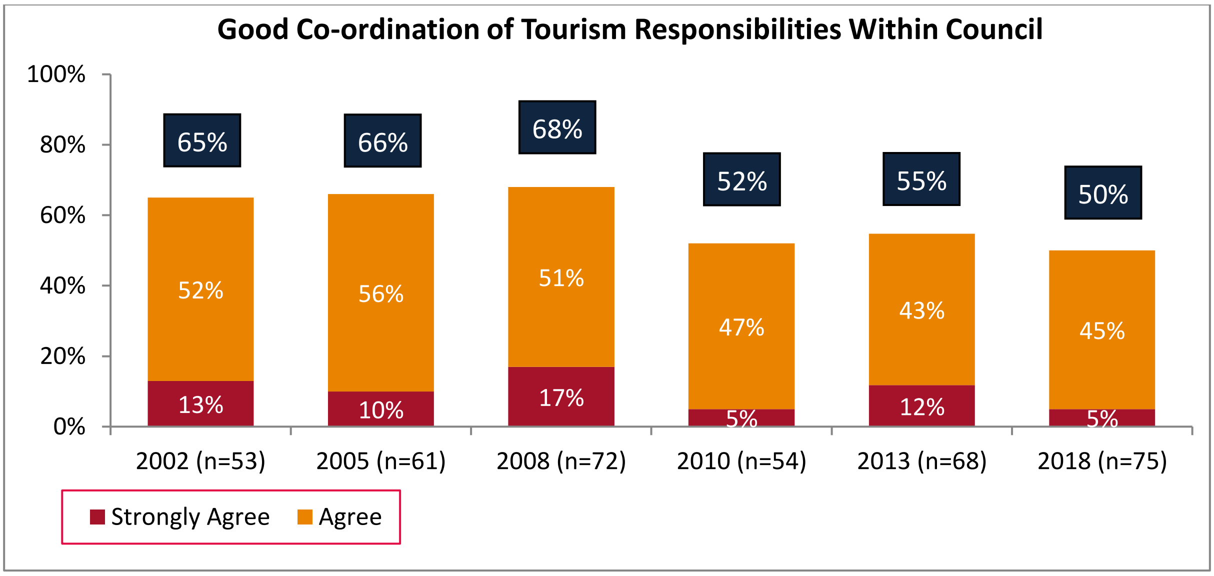
- the presence of a Tourism Portfolio
- inclusion of tourism within the Council's Municipal Strategic Statement
- co-ordination of tourism responsibilities
- how tourism is represented on internal Council committees and that a good relationship exists between the Council and the industry.

In 2008, two additional measures were added to the research:

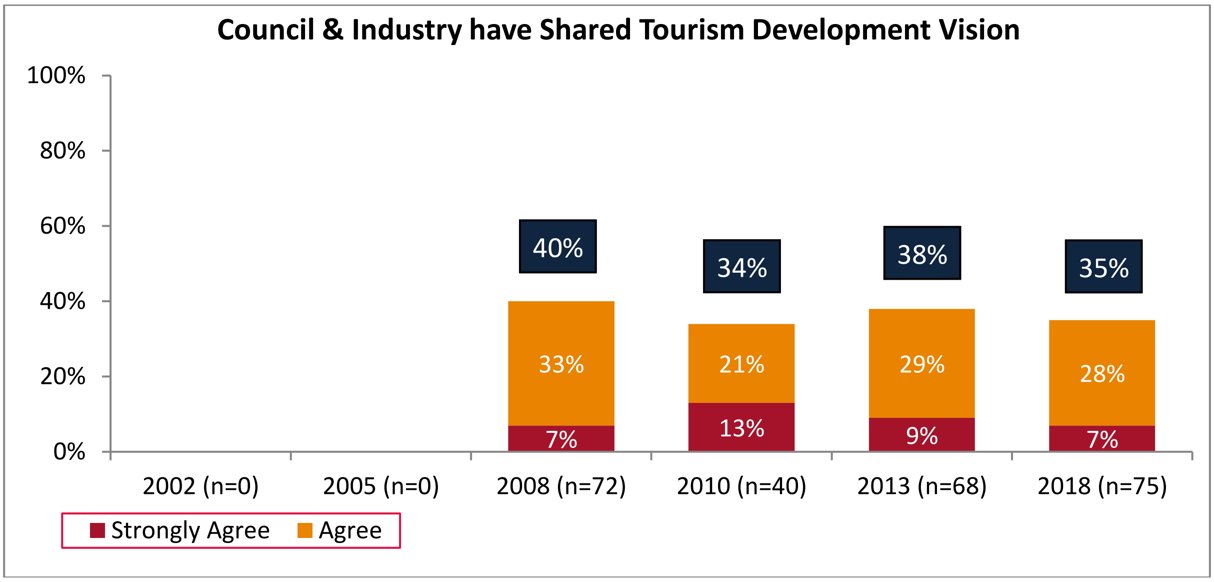
- whether Council and industry have a shared vision of tourism development and management,
- whether Council's objectives match those of the industry.

3.3.1 Integration with the Tourism Industry

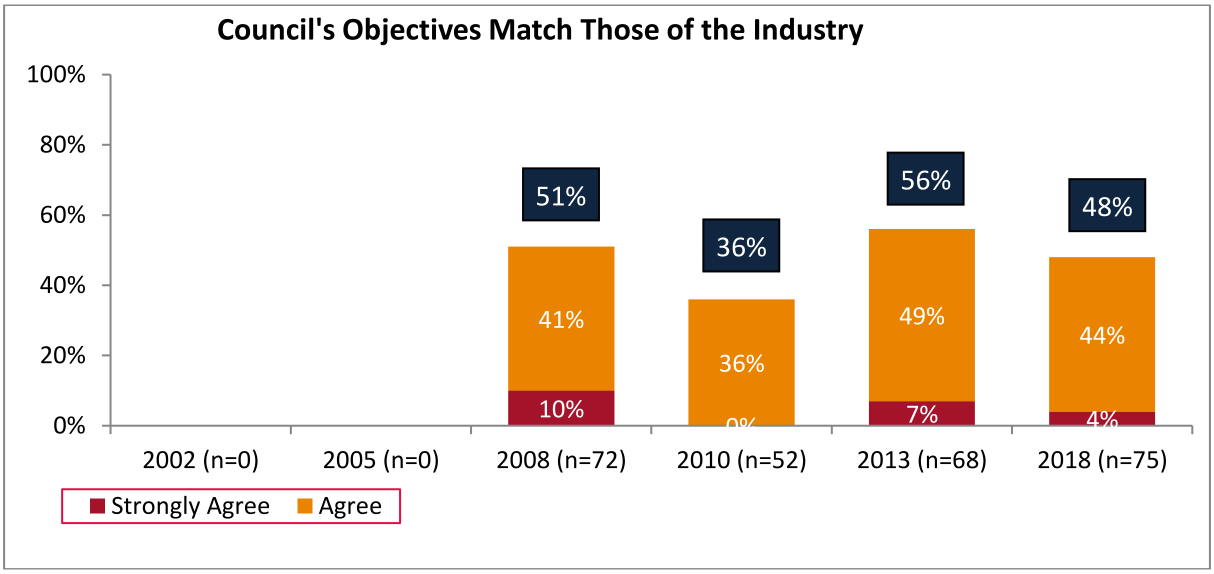
Each of the indicators below recorded a slight decrease in level of agreement in 2018 compared to the 2013 study. The most significant decrease was in relation to the idea that 'Council's objective match those of the industry' – falling from 56% in 2013 to 48% in 2018. The level of agreement with 'Good co-ordination of tourism responsibilities within Council' decreased by 5% and also grew weaker, with only 5% of respondents indicating they strongly agreed, compared with 12% in 2013. Agreement for the concept that 'Council & Industry have shared tourism development vision' also decreased when compared with the previous study.



Q11. Please indicate how strongly you agree with the following statement? There is good coordination of tourism responsibilities within Council



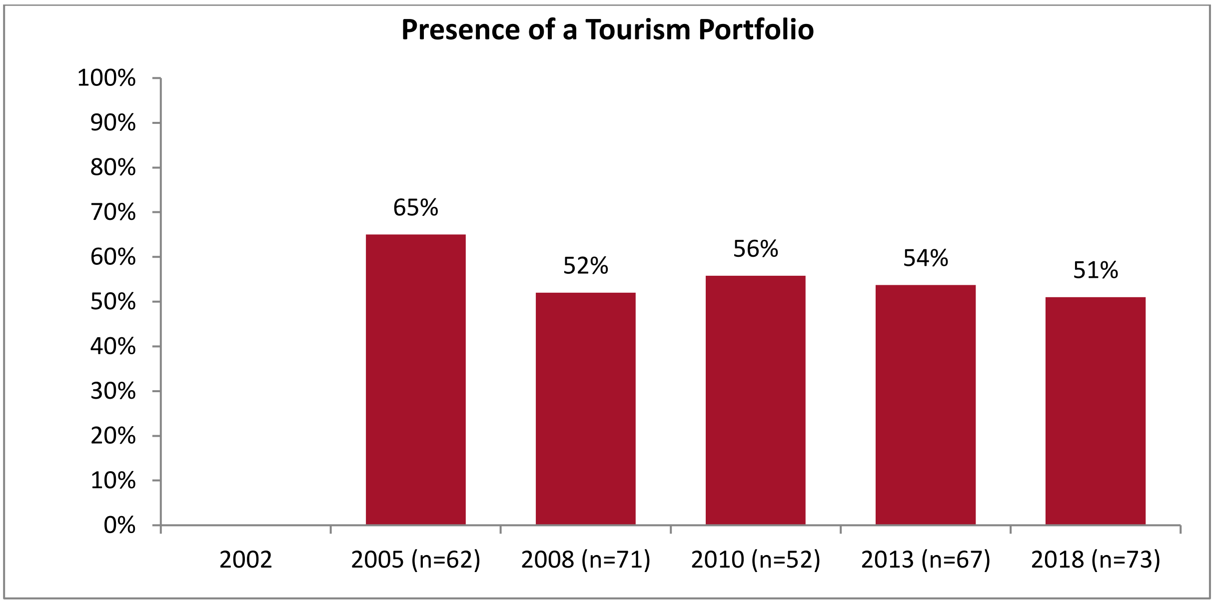
Q11. Please indicate how strongly you agree with the following statement? Council and industry have a shared vision for tourism development and management



Q11. Please indicate how strongly you agree with the following statement? Council's objectives match those of the industry

3.3.2 Presence of a Tourism Portfolio

For the last three assessments, the proportion of Councils with a Tourism Portfolio had been between 53% and 56%, and this year's research found that this percentage has dropped to 51%.



Q8. Do you have a Tourism Portfolio?

3.3.3 Inclusion of Tourism in Council's Municipal Strategic Statement

The proportion of Councils who have tourism included in their Municipal Strategic Statement remained similar to the 2013 result, albeit with a slight decrease of 2%. Whilst this is far from the high result recorded in the 2005 study, this is still a good result in comparison to the last three previous studies.

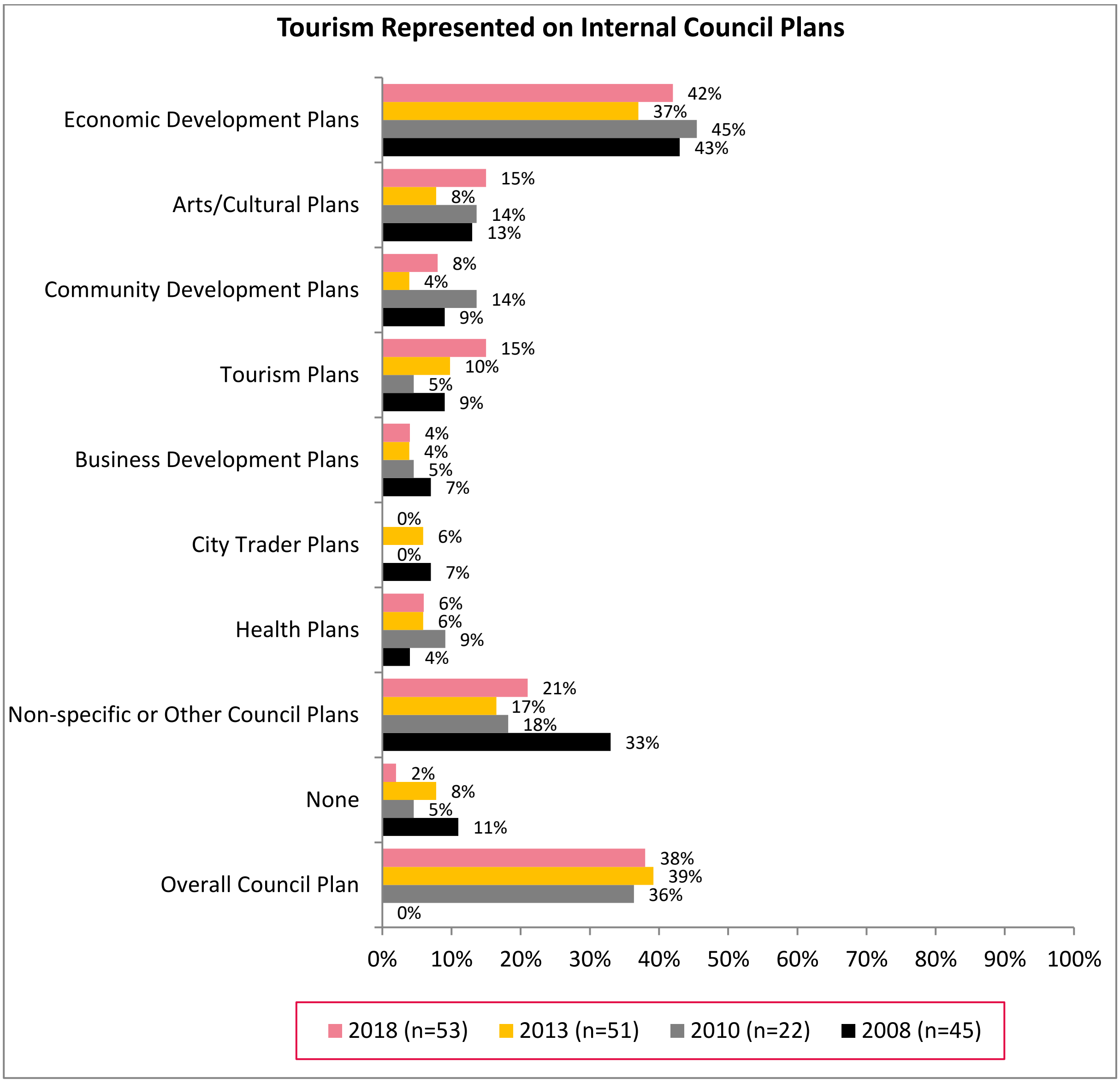
Q9. Is Tourism identified in your Municipal Strategic Statement?

3.3.4 Tourism Represented on internal Council Plans

Of the 75% of Councils who stated that tourism is identified on the Council's Municipal Strategic Statement, the majority (70%) feature tourism on other internal Council Plans.

Most commonly, Councils indicated that tourism was mentioned in their 'overall Council Plan' (38%) or their 'economic development planning' (42%). This presence of tourism on Economic Development Plans represents a significant increase since the last assessment period in 2013, to bring the result back in line with other previous years. Other significant increases were also seen in the presence of tourism on 'Arts & Culture Plans' and specific Tourism Plans.

This question was not asked in 2005 and data is not available from 2002.



Q9. Is Tourism identified in your Municipal Strategic Statement? What, if any, other Council plan featuretourism?

Despite the fact that 88% of Councils consider tourism within their Council has either remained a focus or become more of a focus in the last 3 years, only 38% expressly include tourism in their overall Council Plans. This has remained similar over the last three assessments.

Overall, it appears that there has been a spread in the variety of plans on which tourism is represented. Whilst tourism's presence within 'overall Council Plans' remains consistent with previous results, there has been an increase in the presence in other plans as well as the variety of the plans in which tourism is identified. Interestingly, depending on the Council, tourism may sit within any one of a number of different plans. Furthermore, the incidence of 'no plan whatsoever' has declined to the lowest level in the assessments undertaken within this study.

3.4 Strategic Planning for Tourism by Councils

The variables that were considered in determining the strategic planning for tourism by Councils included:-

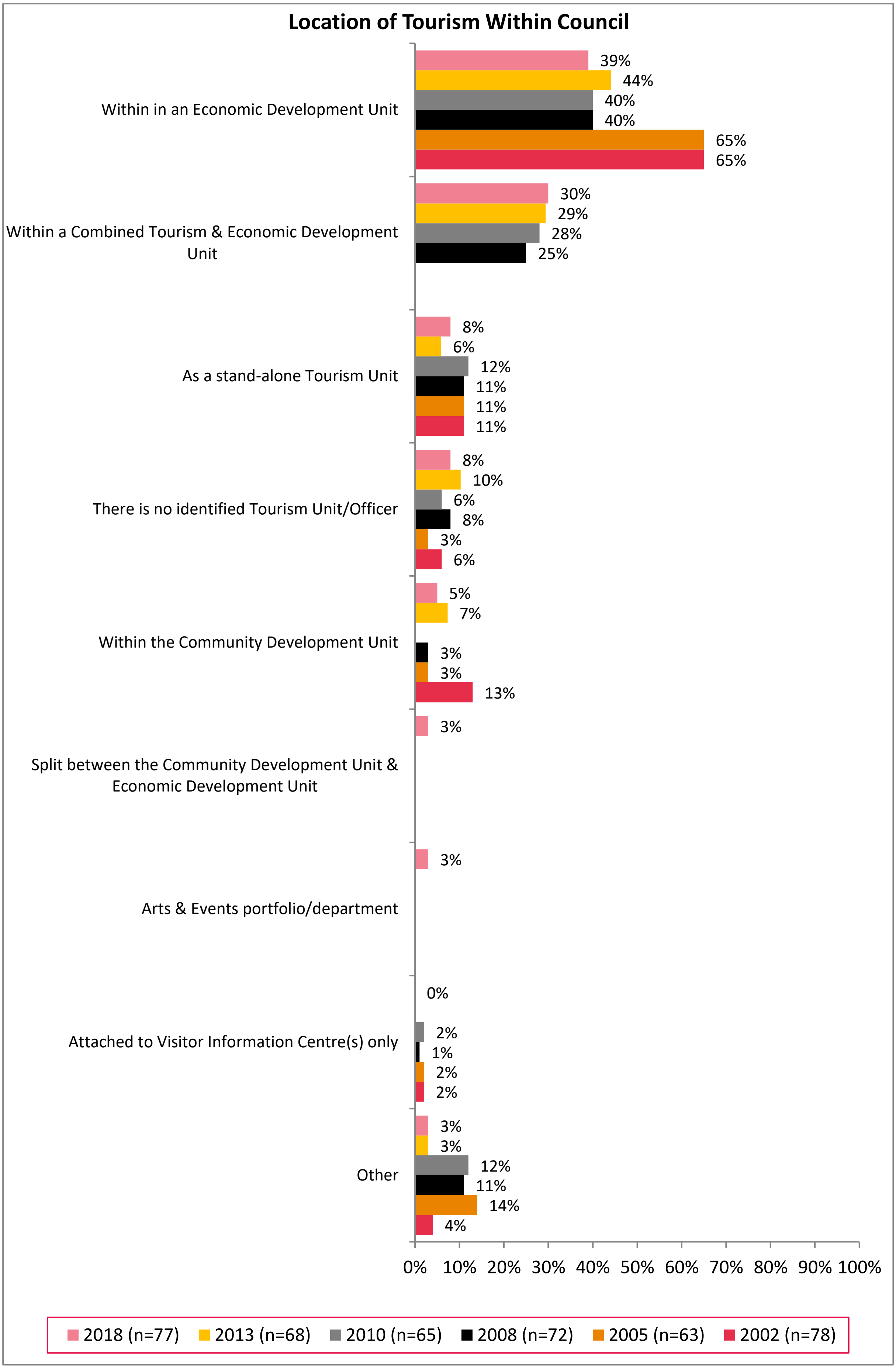
- the position of tourism within the Council structure
- whether Council has a tourism strategy
- the year the tourism strategy was written
- whether Council has clear tourism development objectives
- Council's concern with tourism's economic contribution, and
- whether Council accepts the concept of sustainable tourism management.

3.4.1 Location of Tourism within Council

Despite being well below the levels recorded a decade ago and lower than the 2013 results, the largest proportion of Council's still identified 'tourism' as sitting within an Economic Development Unit (38%). It was also significantly identified as part of a combined Tourism & Economic Development Unit (30%), as well as two Councils listing 'tourism' as being split between their Economic Development Unit and their Community Development Unit. Another two Councils listed their 'Arts & Events Department' as the area where 'tourism' is identified in their structure. The presence of a stand-alone Tourism Unit has increased by 2% since the 2013 study and there has been a 2% decrease in the number of Councils who stated having no identified Tourism Unit or Officer, both of which suggest a growing priority for Tourism to be included in the strategic planning structures.

Some Councils reported that the tourism function either exists or is supported by bodies that sit outside Council (such as Regional Tourism Boards).

> Over the last 10 years, there has been continued growth in combined tourism and economic development plans which has been in contrast to a significant and continued decline in the incidence of tourism sitting within an Economic Development Unit.



Q2. Where does tourism fit into the structure of your Council?

The following table reveals the following findings:-

- While metro Councils have had an increase in the inclusion of Tourism being contained within an Economic Development Unit, regional Councils have reported a significant decline in this category. Metro Councils with a combined Tourism & Economic Development Unit grew significantly, while regional Councils remain constant on this trend.
- For metro Councils, there has been a significant decline in the number of Councils who had no identified Tourism Unit or Officer. Regional Councils rose from 0% to 2% in this category, but this is far lower than the 16% of metro Councils that fall into this group.
- The incidence of tourism having a stand-alone unit has risen in metro Councils from 0% to 3%, and for regional Councils has remained similar to the 2013 result at 10%.

Metro Councils	2002	2005	2008	2010	2013	2018	
	n=(16)	n=(19)	(n=23)	(n=21)	(n=22)	(n=31)	TREND
Within an Economic Development Unit	63%	74%	43%	52%	45%	50%	
Within a combined Tourism & Economic Development Unit	-	-	9%	14%	14%	22%	
As a stand-alone Tourism Unit	0%	5%	4%	0%	0%	3%	
There is no identified Tourism Unit/Officer	13%	11%	26%	19%	32%	16%	
Within the Community Development Unit	19%	0%	0%	0%	0%	3%	
Attached to Visitor Information Centre(s) only	0%	0%	0%	0%	0%	0%	
Within a Parks/Recreation Unit	0%	0%	0%	0%	0%	0%	
Other	6%	11%	17%	14%	9%	0%	

Regional Councils	2002	2005	2008	2010	2013	2018	
	(n=38)	(n=43)	(n=49)	(n=44)	(n=46)	(n=47)	TREND
Within an Economic Development Unit	66%	60%	39%	34%	39%	31%	
Within a combined Tourism & Economic Development Unit	-	-	33%	34%	35%	35%	
As a stand-alone Tourism Unit	16%	14%	14%	18%	9%	10%	
There is no identified Tourism Unit/Officer	3%	0%	0%	0%	0%	2%	
Within the Community Development Unit	11%	5%	4%	0%	4%	6%	
Attached to Visitor Information Centre(s) only	3%	2%	2%	2%	0%	0%	
Within a Parks/Recreation Unit	3%	2%	0%	0%	0%	0%	
Other	3%	16%	8%	11%	13%	4%	

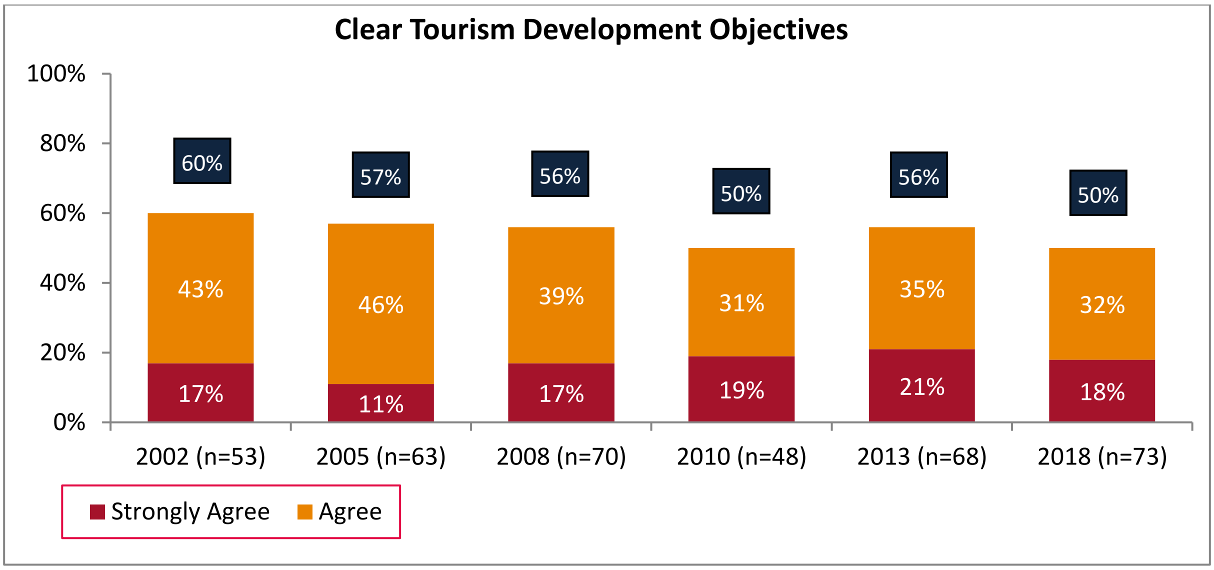
The declining incidence of 'having no identified tourism unit or officer' in metropolitan Councils may be linked to more Councils following the continuing trend of incorporating tourism within a Combined Tourism & Economic Development Unit, in both metro and regional areas.

3.4.2 Council Objectives Dealing with Tourism

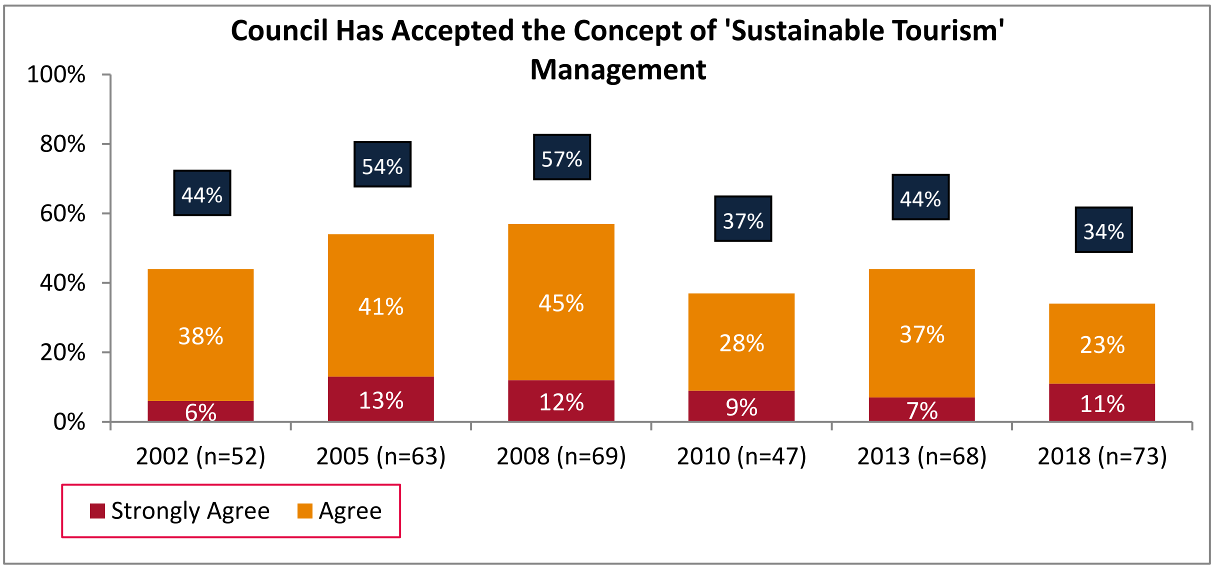
Across two of the three indicators (clear tourism objectives & acceptance of the concept of sustainable tourism development), responses suggest that Council perceptions of the way in which they deal with tourism has had a negative shift.

Council's perception of clarity in the area of tourism objectives has decreased from 56% in 2013, to 50% in 2018. This percentage has remained in a consistent range between 50-60% throughout the past two decades, but this year's figure is at the lowest end of that range.

The issue of sustainable tourism management also recorded a decrease, recording the lowest result of all the research years. This signifies that only one-third of Councils believe that they have fully accepted the concept of 'sustainable tourism management'.

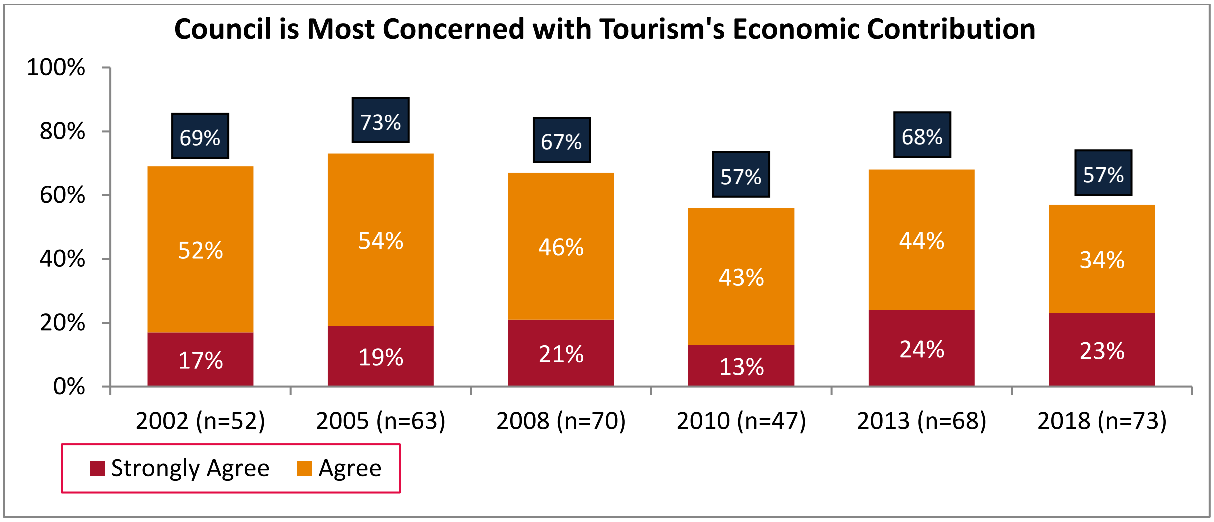


Q11. Please indicate how strongly you agree with the following statement? Council has clear tourism development objectives



Q11. Please indicate how strongly you agree with the following statement? Council has accepted the concept of 'sustainable tourism' management

Regarding Council's level of focus on tourism's economic contribution, respondents recorded a decreasing agreement with the idea that Council is too concerned with economic benefits at the expense of other potential benefits. It is important to note that this indicator assigns 'higher capacity' to those Councils who disagree, signifying that this year's result is a positive improvement. In other words, Councils that are 'most concerned' with economic contribution are operating at lower capacity by ignoring other non-economic benefits. Agreement with the proposition that Council is 'too focused' on economic contribution decreased from 68% to 57%, which represents a lower proportion of Councils (since 2013) that believe that other benefits of tourism are ignored, with the focus solely on the economic contribution. While this is a positive shift, it is important to note that the level of disagreement with this statement was still very low, as many respondents indicated they felt unsure about this view (27%).



Q11. Please indicate how strongly you agree with the following statement? Council is most concerned with tourism's economic contribution (i.e. jobs/investment)

3.4.3 Presence of a Tourism Policy, Strategy & Objectives

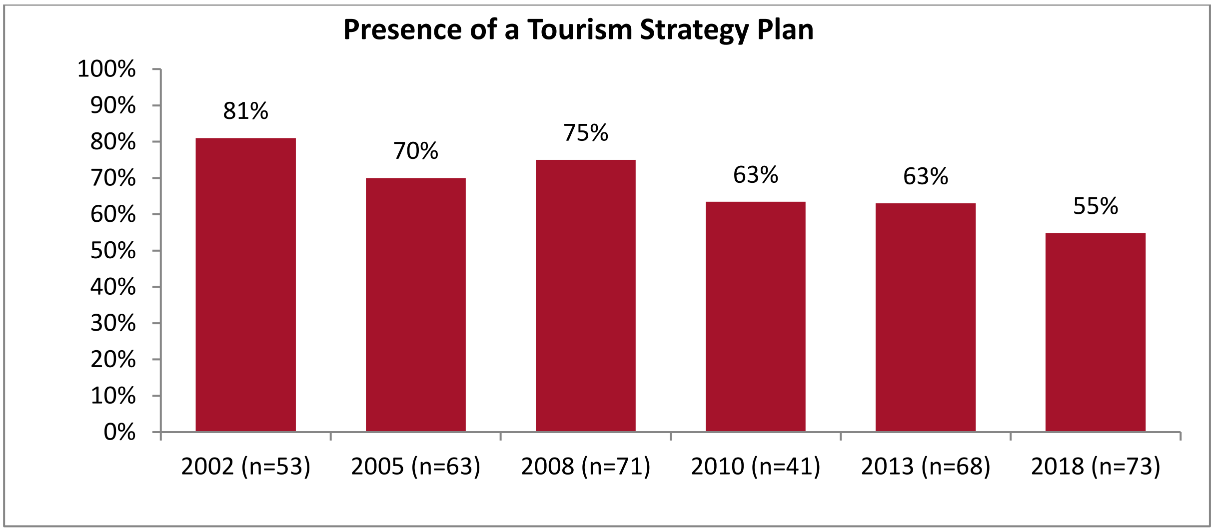
Tourism Policy

Starting in the 2013 study, Councils were asked whether they had a tourism policy for their municipality. Just over 28% of Councils indicated that they have a tourism policy, and this percentage is consistent between metro Councils (28%) and for regional Councils (30%).

Amongst the 21 Councils with a Tourism Policy, there was a range in terms of when the policy was adopted, with the earliest policy being adopted in 2000. Overall 61% of Councils adopted their plan in the past 5 years (2014 onwards), including 24% who adopted their plans recently in the last 18 months. The remaining 39% of Councils stated that their policy was adopted in 2013 or later. Of those Councils that have a Tourism Policy, 43% said that they review it annually and a further 19% said that they review it quarterly.

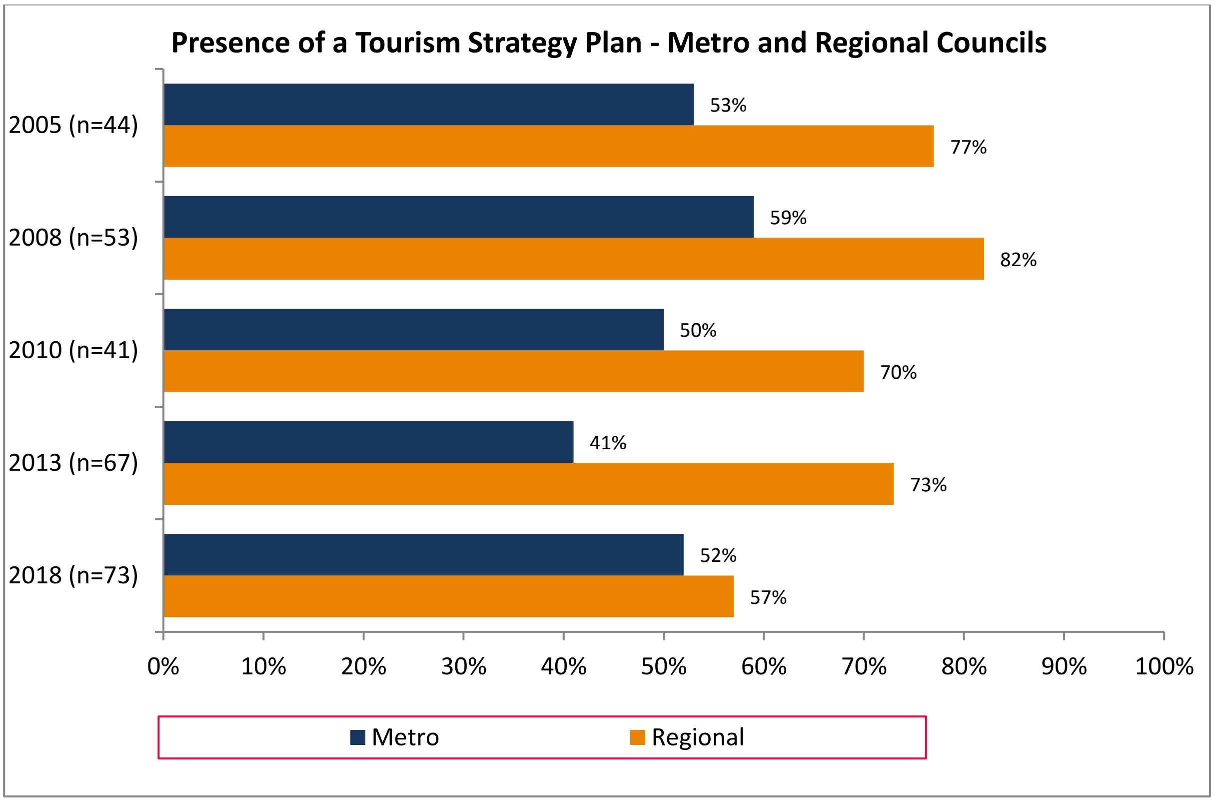
Tourism Strategy Plan

The number of Councils that have a Tourism Strategy Plan dropped from 63% in 2013 to 55% in 2018. This is the lowest recorded result across all research years, with previous years having a percentage between 63-81%.



Q6. Is there a Tourism Strategy Plan for your Municipality?

Presence of a Tourism Portfolio has previously been more likely of regional Council's, and while this is still the case in 2018, regional Council's recorded a drop in the percentage of Council's with a Tourism Strategy Plan.



Q6. Is there a Tourism Strategy Plan for your Municipality?

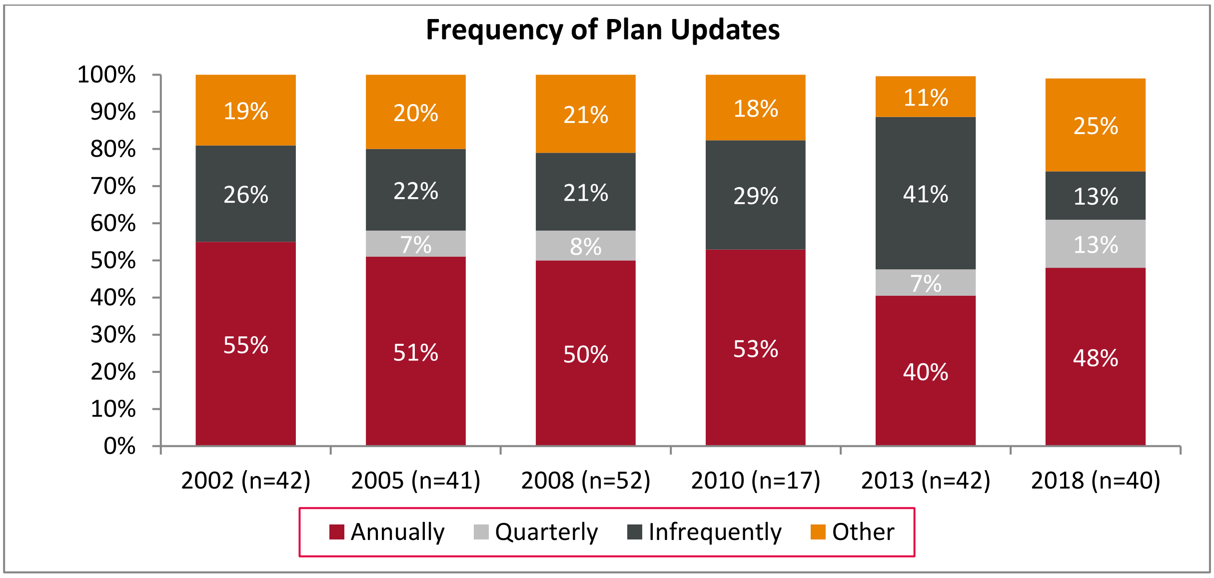
Several Councils provided reasons for not having such a plan, which explains the significant decline. The most common causes of Councils indicating that they do not have a Tourism Strategy Plan include:

- The existence of an equivalent plan at RTB level
- The plan is incorporated into the Economic Development Plan or other Council plans
- The plan has expired and/or is currently being drafted
- Tourism is not a priority for the Council.

In the 2013 report, it was hypothesized that perhaps attention was being diverted from internal Council tourism planning to leveraging the RTB structure to provide this support. There is some evidence that this has happened for several Councils.

Those Councils that have a tourism strategy plan were asked in which year it was written. Just over one-third of Councils said that the plan was written in the last 18 months (34%), whilst a further 18% said that it was written in 2016. Of these Councils with a Tourism Strategy Plan, 4 Councils indicated that their plan was five or more years old, being written in 2012, 2011, 2010 and the oldest plan having been written over 17 years ago in the year 2000.

Nearly half of those Councils that have a Tourism Strategic Plan said that they update it annually (48%) and a further significant portion update the plan quarterly (13%). This represents a significant improvement since the last study in 2013, which saw only 47% of Councils updating the plan quarterly or annually.

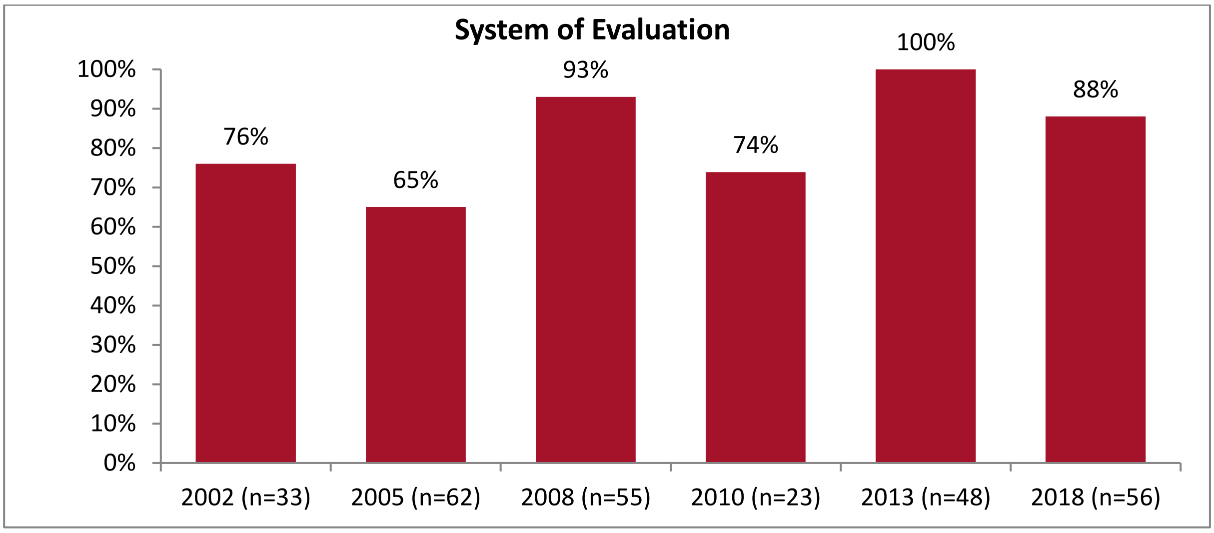


Q6c. How often is the Strategic Plan updated?

Tourism Objectives

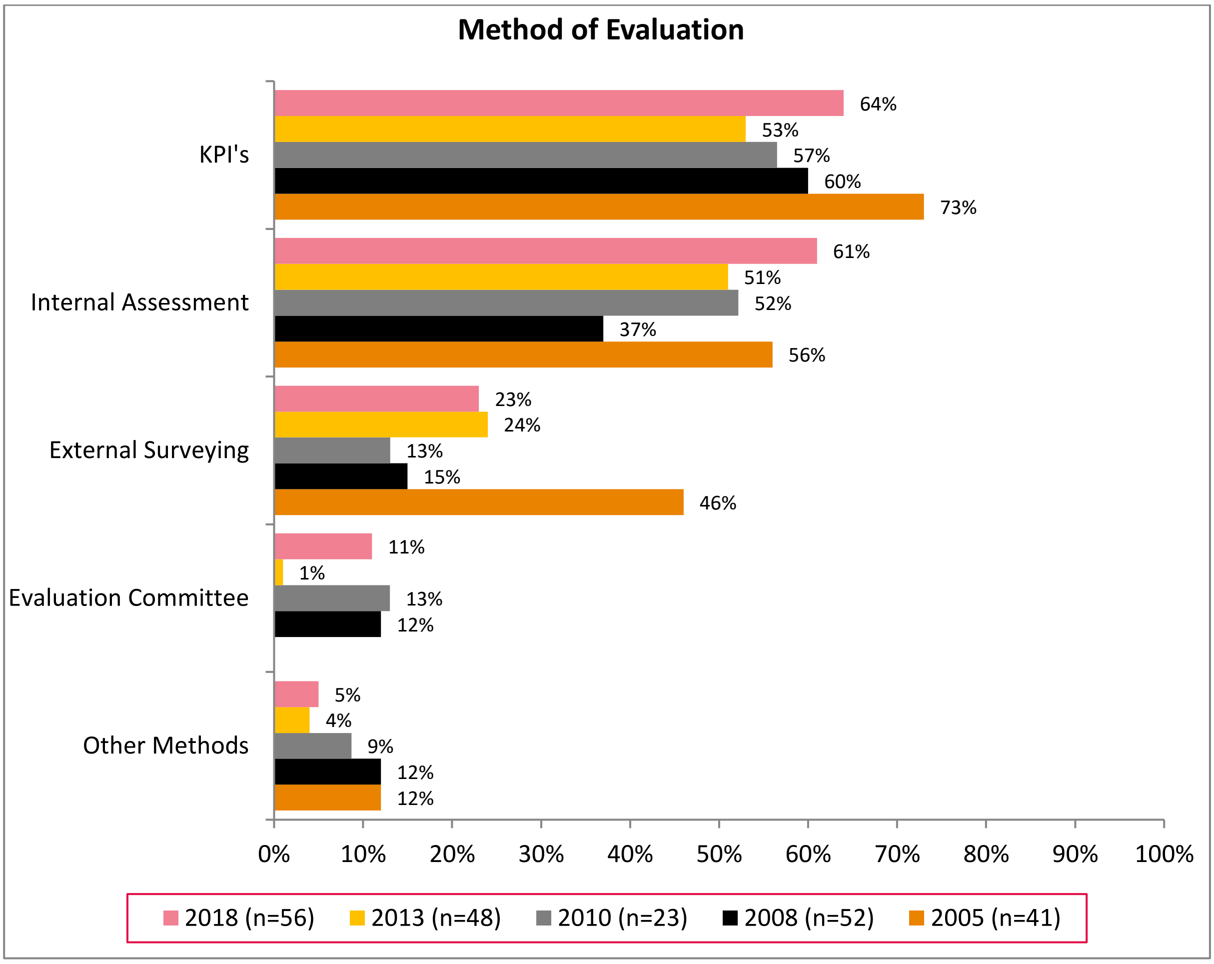
The majority of Councils indicated that they have a set of stated tourism objectives (77%), which was slightly more likely for metro Councils (79%) than regional Councils (75%). Overall, this represents a significant increase on the 71% in 2013 – largely driven by an increase in metro Councils participating in 2018 (79% compared to 59% in 2013).

The proportion of Councils that actively monitor their tourism objectives has fluctuated over the years that the study has been conducted. In the previous study in 2013, all of the Councils with tourism objectives indicated that they have mechanisms in place to evaluate their tourism objectives. In comparison the 2018 research shows that currently 88% of the Councils with tourism objectives have a system to evaluate whether they are being met.



Q7a. Does your Council have a system for evaluating whether Tourism Strategies/Objectives are being met?

The majority of Councils indicated that they undertake internal assessments (64%) and/or KPI measurements (61%) as their method of evaluating tourism objectives. A significant number of Councils also undertake external surveying in order to evaluate their tourism objectives (23%). A small proportion of Councils utilise an external committee (11%), with all but one of these Councils utilising this as well as additional methods. Overall in 2018, there were increases in nearly all of the methods of evaluation, indicating that the Councils that implement evaluation are using multiple methods to do so rather than just one.

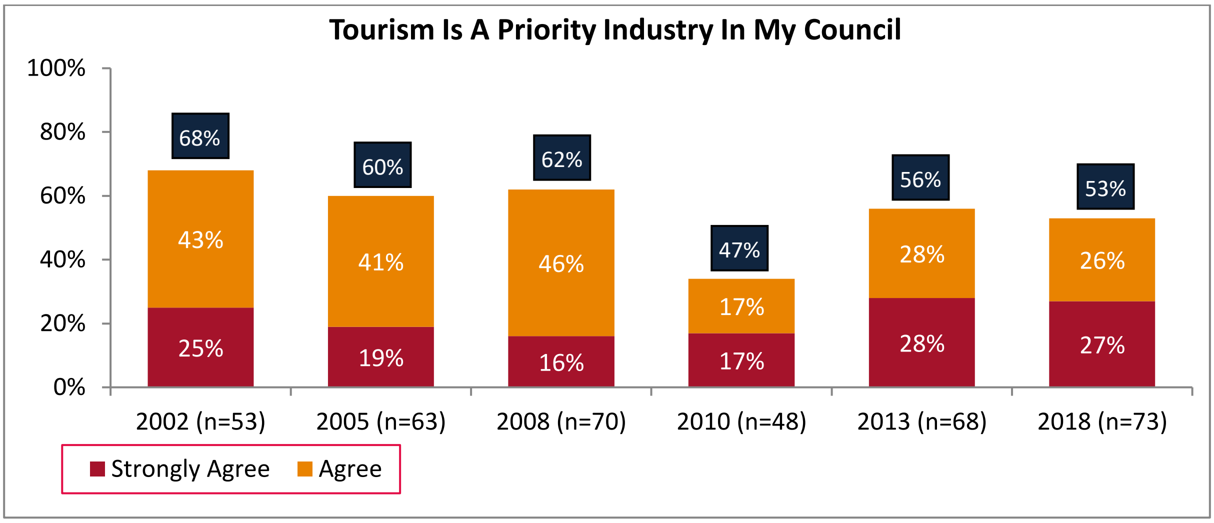


Q7b. If yes, how are they evaluated?

It is worth noting the growth in internal assessments as a mechanism for monitoring tourism KPI's within Council. The interesting aspect is that this could mean a variety of different methods from Council to Council. It also may suggest a method of evaluation that is not truly independent.

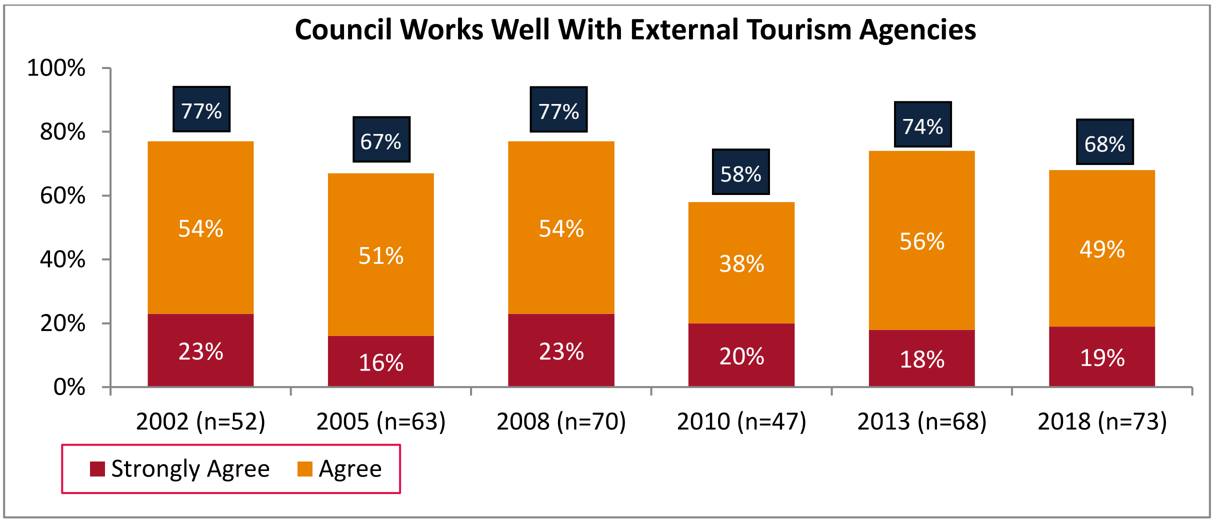
3.4.4 Council's role in encouraging Tourism Development

Participating Councils were asked about the way Council dealt with tourism. Just over 53% of Councils agree that tourism is a priority industry in their Council. This represented a similar outcome to the 2013 result (56%).



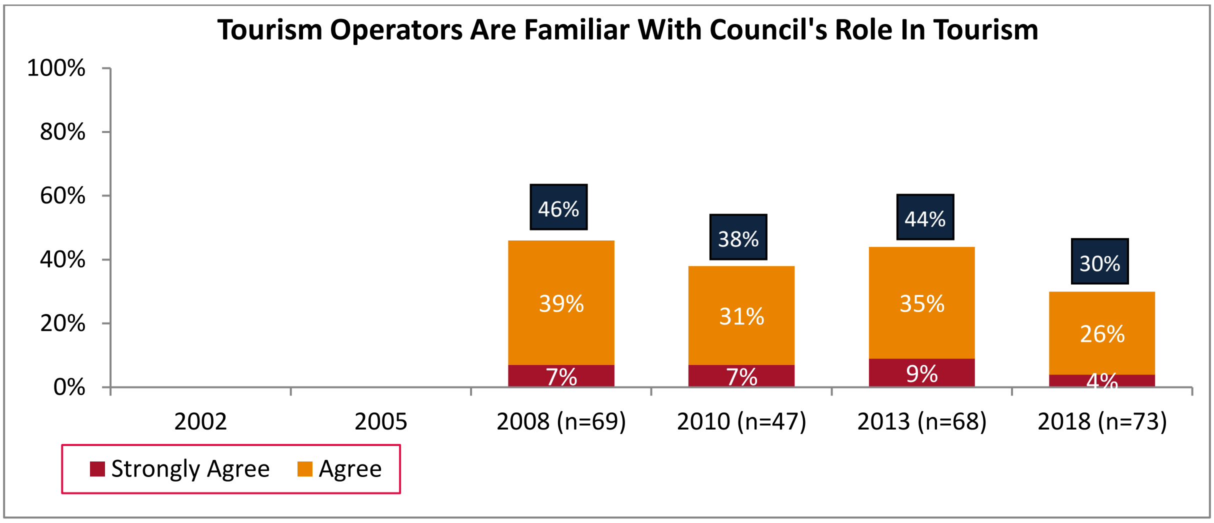
Q11. Please indicate how strongly you agree with the following statement? Tourism is a priority industry in my Council

In considering whether Council works well with external tourism agencies, 68% of this year's responding Councils agreed. This represents a decline in agreement from the previous study in 2013, but sits within the range of results over the years that the study has been conducted.



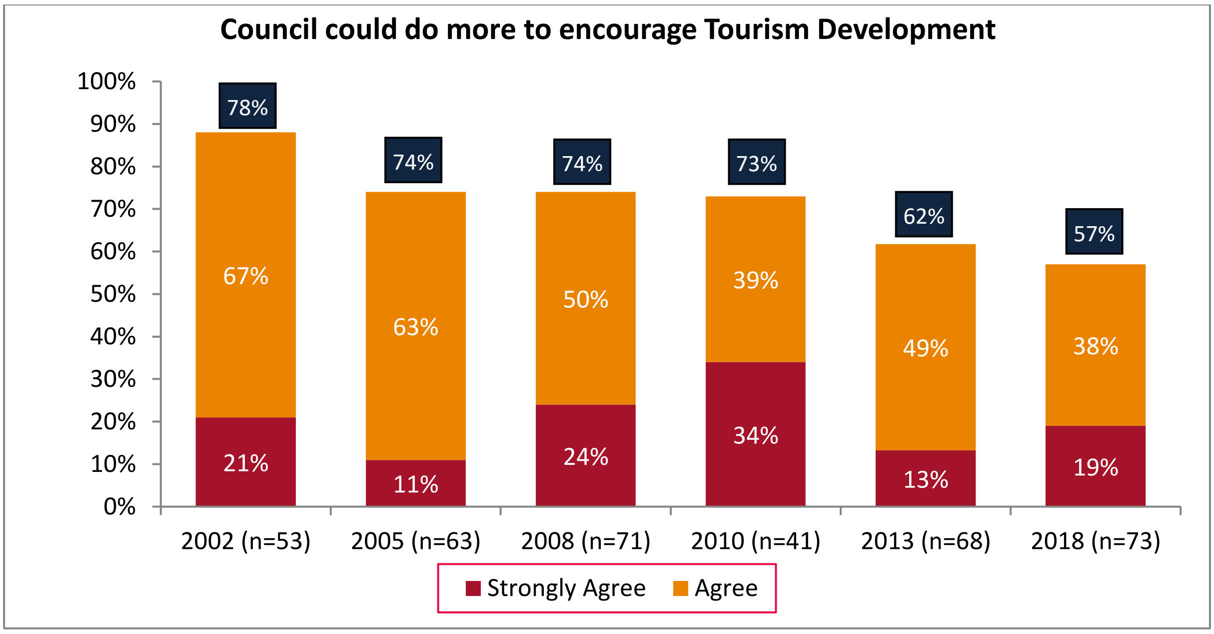
Q11. Please indicate how strongly you agree with the following statement? Council works well with external tourism agencies

Only 30% of Councils agree that tourism operators are familiar with Council's role in tourism, which is both a significant decrease from the previous study as well as the lowest agreement rating in the history of the study.



Q11. Please indicate how strongly you agree with the following statement? Tourism operators/committees are familiar with the role Council plays in tourism

The data suggests that Councils are growing more positive about the role that Councils are playing in encouraging tourism development. Over the history of the study, the proportion of Councils that believe that they could do more to encourage tourism has decreased, with this year's study being the lowest recorded. Remembering that this indicator assigns 'higher capacity' to those Councils for whom agreement <u>is not the case</u>. In this way, it makes the case that agreement with this view (Councils could do more to encourage tourism development) is a representation of a Council operating at lower capacity. Therefore, the decline in agreement is actually illustrating an increase in capacity in this area.



Q11. Please indicate how strongly you agree with the following statement? Council could do more to encourage tourism development

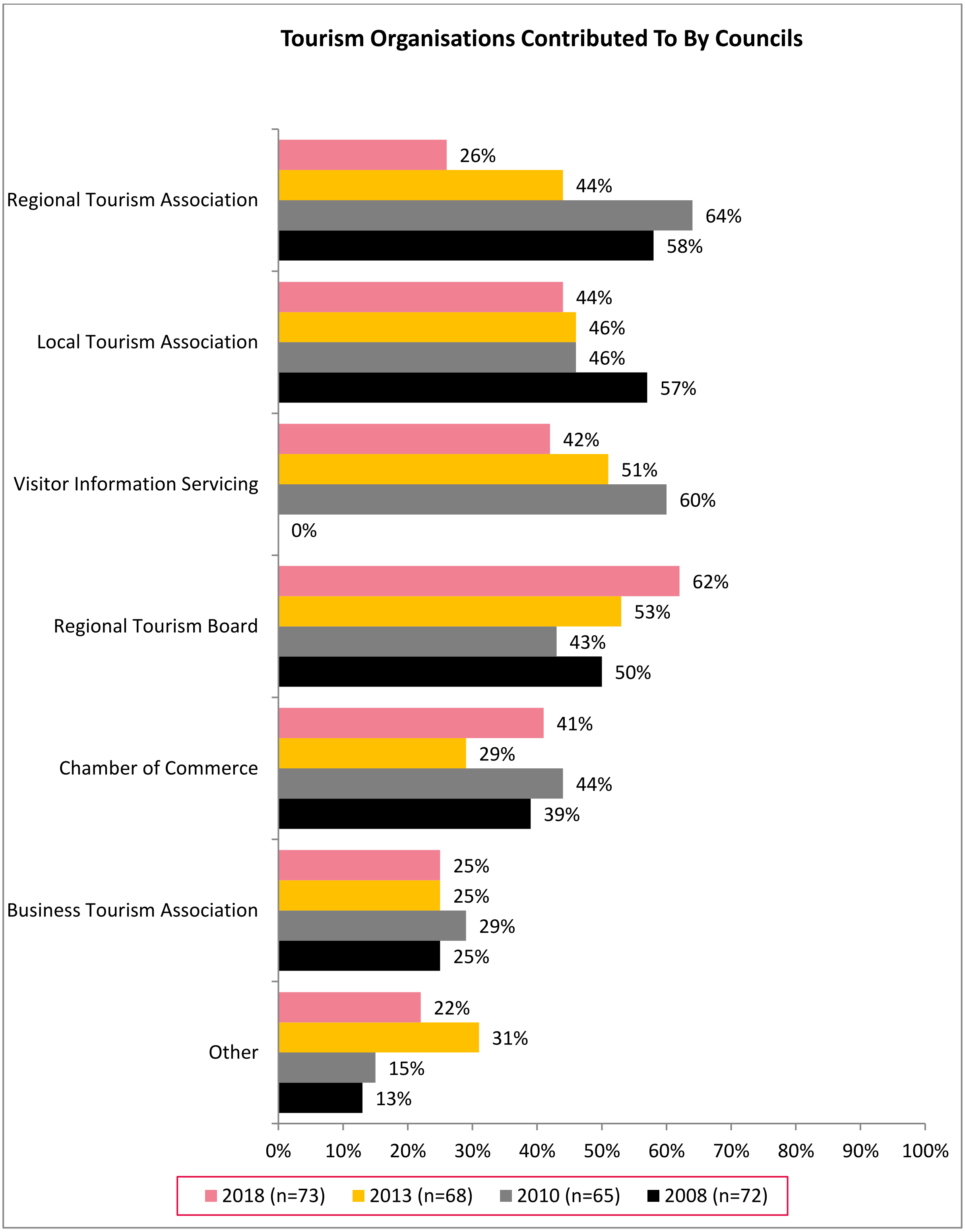
3.5 Relationship with External Stakeholders

3.5.1 Contribution to external Tourism Organisations and Committees

Over the last five years, relationships with external stakeholders were explored by assessing:-

- how many external tourism organisations received contributions from Council (in terms of finance, staff time, or other in-kind contributions),
- respondent perceptions of whether Council worked well with external tourism agencies, and
- whether tourism was a priority industry within Council.

Councils were asked whether they contribute to external tourism related organisations or committees in terms of financial support, staff time and/or other in-kind assistance. Councils recorded a significant increase in support to Regional Tourism Boards with over 60% of the Councils doing so (up from 53% in 2013), as well as for Chambers of Commerce which also had a large increase. This appears to have been balanced by a reduction in support for Regional Tourism Associations and Visitor Information Servicing. Local Tourism Associations and Business Tourism Associations have received support similar to previous years.



Q10. Which external tourism related organisations do Council make contributions to?

For Regional Tourism Associations, Local Tourism Associations, and Visitor Information Servicing Councils indicated that they provide their contribution fairly evenly as both financial support and staff support, with less provision of other in-kind support. For RTB's Councils provide a significantly higher percentage of their support financially, and for Chamber of Commerce, Business Tourism Associations and other external tourism related organisations or committees, Councils provide a greater percentage of their support with the use of staff.

Organisation	Proportion of Councils that support each organisation		How are these organisations supported by Council?					
			Receive Financial Support		Receive Staff Support		Receive other in-kind Support	
	2013 (n=68)	**2018 (n=73)**	**2013**	**2018**	**2013**	**2018**	**2013**	**2018**
Regional Tourism Association	44%	26%	41%	21%	37%	19%	25%	8%
Local Tourism Association	46%	44%	40%	29%	38%	32%	26%	7%
Visitor Information Servicing	51%	42%	46%	32%	44%	30%	22%	11%
Regional Tourism Board	53%	62%	50%	58%	43%	38%	26%	22%
Chamber of Commerce	29%	41%	18%	23%	19%	27%	18%	8%
Business Tourism Association	25%	25%	22%	12%	19%	15%	13%	3%
Other	31%	22%	24%	8%	21%	14%	15%	5%

Q10a: Please identify the name of the committee/organisation and indicate what type of contribution (cash, staff time, or other in-kind) your Council makes.

The following table illustrates the average dollar value of financial support provided to external organisations or committees by Councils in Victoria. Furthermore, it illustrates the average dollar amount cross-tabulated by groupings based on population size:-

Average spend on external tourism related organisations or committees

Population	Regional Tourism Assoc.	Local Tourism Assoc.	Visitor Information Centre	Regional Tourism Board	Chamber of Commerce	Business Tourism Assoc.
Group 1 - < 25,000	$13,667	$8,200	$208,101	$49,277	$35,813	$11,667
Group 2 - 25,001 - 50,000	$77,333	$82,143	$258,607	$143,834	$12,500	$20,000
Group 3 - 50,001 - 100,000	$20,000	$30,000	$230,000	$51,832	$141,667	$183,333
Group 4 - >100,001	$18,600	$916,667	$323,950	$253,343	$119,375	$5,000
Aggregate	**$28,467**	**$163,667**	**$243,973**	**$111,259**	**$71,412**	**$68,333**
Aggregate (excluding outlier)		**$36,850**				**$11,250**

Q10a: Please identify the name of the committee/organisation and indicate what type of contribution (cash, staff time, or other in-kind) your Council makes.

The table above illustrates that whilst Visitor Information Services have experienced a decrease in support from Councils overall, this external tourism related organisation receives the highest financial spend on average from Councils. It is important to note that some Local Councils rely heavily on external organisations and therefore contribute significantly financially to them.

4.0 Appendices

4.1 Council groupings by population

Council	Population	Grouping	Council	Population	Grouping
Alpine (S)	12,515	0-25,000	Baw Baw (S)	50,364	50,001 - 100,000
Ararat (RC)	11,723	0-25,000	Greater Shepparton (C)	65,593	50,001 - 100,000
Benalla (RC)	13,960	0-25,000	Hobsons Bay (C)	94,984	50,001 - 100,000
Buloke (S)	6,151	0-25,000	Latrobe (C)	74,612	50,001 - 100,000
Central Goldfields (S)	13,073	0-25,000	Maribyrnong (C)	89,705	50,001 - 100,000
Colac-Otway (S)	21,436	0-25,000	Mildura (RC)	55,071	50,001 - 100,000
Corangamite (S)	16,086	0-25,000	Nillumbik (S)	64,720	50,001 - 100,000
Gannawarra (S)	10,563	0-25,000	Yarra (C)	96,368	50,001 - 100,000
Glenelg (S)	19,644	0-25,000	Ballarat (C)	105,328	100,001 - 150,000
Golden Plains (S)	22,480	0-25,000	Banyule (C)	129,341	100,001 - 150,000
Hepburn (S)	15,668	0-25,000	Bayside (C)	104,030	100,001 - 150,000
Hindmarsh (S)	5,677	0-25,000	Cardinia (S)	102,516	100,001 - 150,000
Horsham (RC)	19,833	0-25,000	Frankston (C)	140,708	100,001 - 150,000
Indigo (S)	16,220	0-25,000	Greater Bendigo (C)	113,617	100,001 - 150,000
Loddon (S)	7,505	0-25,000	Manningham (C)	124,517	100,001 - 150,000
Mansfield (S)	8,725	0-25,000	Maroondah (C)	116,489	100,001 - 150,000
Mount Alexander (S)	19,171	0-25,000	Melton (S)	148,896	100,001 - 150,000
Moyne (S)	16,741	0-25,000	Moonee Valley (C)	125,425	100,001 - 150,000
Murrindindi (S)	14,167	0-25,000	Port Phillip (C)	110,397	100,001 - 150,000
Northern Grampians (S)	11,498	0-25,000	Stonnington (C)	114,138	100,001 - 150,000
Pyrenees (S)	7,347	0-25,000	Boroondara (C)	179,446	150,001 +
Queenscliffe (B)	2,934	0-25,000	Brimbank (C)	208,443	150,001 +
Southern Grampians (S)	16,051	0-25,000	*Casey (C)	327,380	150,001 +
Strathbogie (S)	10,455	0-25,000	Darebin (C)	158,553	150,001 +
Swan Hill (RC)	20,849	0-25,000	Glen Eira (C)	151,746	150,001 +
Towong (S)	5,974	0-25,000	Greater Dandenong (C)	164,148	150,001 +
West Wimmera (S)	3,867	0-25,000	Greater Geelong (C)	244,798	150,001 +
Yarriambiack (S)	6,673	0-25,000	Hume (C)	215,928	150,001 +
Bass Coast (S)	34,223	25,001 - 50,000	Kingston (C)	161,089	150,001 +

Campaspe (S)	37,463	25,001 - 50,000	Knox (C)	162,116	150,001 +
East Gippsland (S)	45,960	25,001 - 50,000	Melbourne (C)	159,992	150,001 +
Macedon Ranges (S)	48,438	25,001 - 50,000	Monash (C)	196,789	150,001 +
Mitchell (S)	42,795	25,001 - 50,000			
Moira (S)	29,465	25,001 - 50,000			
Moorabool (S)	33,418	25,001 - 50,000			
South Gippsland (S)	29,124	25,001 - 50,000			
Surf Coast (S)	31,324	25,001 - 50,000			
Wangaratta (RC)	28,824	25,001 - 50,000			
*Warrnambool (C)	34,555	25,001 - 50,000			
Wellington (S)	43,747	25,001 - 50,000			
Wodonga (RC)	40,564	25,001 - 50,000			

* Council did not respond to the 2018 survey