

# Domestic tourism expenditure in Victoria

## Year ending December 2000-2015



1. The December 2015 release provides two full years of data that have been captured under the new methodology. This is the first year that like-for-like comparisons can be drawn with the results for December 2014. However, comparisons with results preceding the introduction of the new methodology (2000–2013) should be used with caution. While percentage change figures are provided, interpretation of these results should focus on comparisons of relative performance against other states (e.g. New South Wales, Queensland) and the national average, rather than absolute rates of growth.

2. There were definitional changes to some of the boundaries in 2015. Refer to the final page for detail of these changes.

### SUMMARY RESULTS

- Total domestic tourism expenditure (combined overnight and daytrip expenditure) in Victoria was \$16.6 billion in the year ending December 2015, while in regional Victoria, total domestic tourism expenditure reached \$7.7 billion.
- Total domestic tourism expenditure in Victoria increased at an average annual rate of 5.0% for the period year ending December 2010 to 2015, and in regional Victoria at an average annual rate of 4.2%.
- Holiday visitors accounted for the largest proportion of domestic overnight expenditure<sup>#</sup> in Victoria for the year ending December 2015, spending \$5.2 billion. This segment also had the highest expenditure per visitor (\$551 per visit) although Business visitors closely followed (at \$540 per visit). Along with this, Business visitors had the highest spend per night (\$214 per night). Expenditure increased year-on-year for Business (+3.8%), Holiday (+2.5%) and VFR (+2.1%) overnight visitors for the year ending December 2015. Expenditure by Business visitors increased at an average annual rate of 11.1% from the year ending December 2010 to 2015, while VFR (+6.9% p.a.) and Holiday (+2.7% p.a.) expenditure also increased.
- Overnight visitor expenditure in Melbourne increased by 7.8% year-on-year to \$7.0 billion in the year ending December 2015, while there was an average annual increase of 6.3% from year ending December 2010 to 2015. Daytrip visitor expenditure in Melbourne was approximately \$1.8 billion for the year ending December 2015, with an average annual increase of 3.0% from year ending December 2010 to 2015.
- Overnight visitor expenditure in regional Victoria increased by 0.8% year-on-year to \$5.0 billion for the year ending December 2015, while there was an average annual increase of 3.9% from the year ending December 2010 to 2015. Daytrip visitor expenditure in regional Victoria increased at an annual average rate of 4.9%, with a year-on-year decrease of 5.9% to \$2.7 billion in the year ending December 2015.
- Of Victoria's campaign regions (excluding Melbourne), the Murray, Great Ocean Road\* and Mornington Peninsula regions received the highest total domestic tourism expenditure for the year ending December 2015, with combined overnight and daytrip visitors spending \$1.2 billion, \$1.1 billion and \$819 million respectively. Daylesford and Macedon Ranges (+41.1%) and Geelong and the Bellarine\* (+6.7%) experienced the strongest growth for the year ending December 2015 compared to the previous year.
- Great Ocean Road\* and Murray regions received the highest domestic overnight expenditure for the year ending December 2015, with visitors spending \$830 million and \$763 million respectively. Daylesford and Macedon Ranges (+51.6%), Mornington Peninsula (+18.6%) and Victoria's High Country (+6.2%) experienced the strongest growth for the year ending December 2015 compared to the previous year.
- Murray (\$434 million), Goldfields\* (\$341 million), Mornington Peninsula (\$338 million) and Yarra Valley and Dandenong Ranges (\$306 million) received the highest domestic daytrip expenditure for the year ending December 2015. Daylesford and Macedon Ranges (+27.5%), Geelong and the Bellarine\* (+10.4%) and Yarra Valley and Dandenong Ranges (+4.9%) experienced the strongest year-on-year growth.

<sup>#</sup> Expenditure by purpose is destination expenditure only; \* Please note a change to the regional definition. Further information can be found on the back page.

Source: Tourism Research Australia expenditure allocation method applied to National Visitor Survey data for the years ending December 2010 to 2015.

Base: Only those trips where Australian's aged 15 years and over are away from home for less than 12 months are in scope.

Fact sheet produced by the Research Unit, March 2016

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### DOMESTIC OVERNIGHT TOURISM EXPENDITURE IN VICTORIA BY PURPOSE<sup>#</sup>

Expenditure by Domestic Overnight Visitors in Victoria	Total Expenditure					Expenditure Per Night			Expenditure Per Visitor		
	(\$ million)			Ave Ann Change	Yearly Change	(\$)			(\$)		
	2010	2014	2015	2010-15	2014-15	2010	2014	2015	2010	2014	2015
Year ending December											
Holiday	4,520	5,048	5,175	+2.7% p.a.	2.5%	175	171	181	582	578	551
VFR	1,445	1,973	2,015	+6.9% p.a.	2.1%	91	97	93	264	272	268
Business	1,213	1,980	2,054	+11.1% p.a.	3.8%	174	207	214	452	559	540
Other	273	396	456	+10.8% p.a.	15.2%	110	115	125	355	363	386
<b>Total</b>	<b>7,451</b>	<b>9,397</b>	<b>9,700</b>	<b>+5.4% p.a.</b>	<b>3.2%</b>	<b>146</b>	<b>150</b>	<b>153</b>	<b>454</b>	<b>463</b>	<b>449</b>

<sup>#</sup> Expenditure by purpose is destination expenditure only

Domestic Overnight Visitor - Australians who undertake an overnight trip are referred to as overnight visitors. Overnight trips are defined as trips involving a stay away from home for at least one night, at a place at least 40 kilometres from home.

Holiday/Leisure – The main purpose/reason for visiting the destination. Includes holidays, travel for leisure, entertainment, sport as a participant and spectator, shopping, relaxation and just 'getting away'.

Visiting Friends and Relatives (VFR) – The main purpose/reason for visiting the destination. Includes travel such as to a friend's or relative's wedding or to a funeral.

Business – The main purpose/reason for visiting the destination. Includes business, work travel for transport crews, attendance at conferences, conventions, exhibitions and trade fairs, training and research related to employment.

AAG - Annual Average Growth

Source: Tourism Research Australia expenditure allocation method applied to National Visitor Survey data for the years ending December 2010 to 2015.

Base: Only those trips where Australian's aged 15 years and over are away from home for less than 12 months are in scope.

For further information please refer to our summary of Research sources, definitions and methodologies document found here: <http://www.tourism.vic.gov.au/research.html>

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## Year ending December 2000-2015



### TOTAL DOMESTIC TOURISM EXPENDITURE IN VICTORIA

Nominal Expenditure by Domestic Overnight and Daytrip Visitors in Victoria	Total Domestic Expenditure				
	(\$ million)			AAG	Yearly Change
	2010	2014	2015	2010-15	2014-15
Year ending December					
Total Victoria	13,005	16,223	16,563	+5.0% p.a.	2.1%
Regional Victoria	6,283	7,867	7,736	+4.2% p.a.	-1.7%
<b>Victoria's Campaign Regions</b>					
Daylesford and the Macedon Ranges	225	265	373	+10.6% p.a.	41.1%
Geelong and the Bellarine*	606	681	726	+3.7% p.a.	6.7%
Gippsland	718	802	801	+2.2% p.a.	0.0%
Goldfields*	653	851	745	+2.7% p.a.	-12.4%
Grampians	206	420	398	+14.1% p.a.	-5.1%
Great Ocean Road*	891	1,108	1,088	+4.1% p.a.	-1.8%
<b>Melbourne</b>	<b>6,722</b>	<b>8,355</b>	<b>8,827</b>	<b>+5.6% p.a.</b>	<b>5.6%</b>
Mornington Peninsula	590	792	819	+6.8% p.a.	3.4%
Murray	918	1,333	1,197	+5.5% p.a.	-10.2%
Phillip Island	346	403	349	+0.2% p.a.	-13.3%
Victoria's High Country	720	670	679	-1.2% p.a.	1.4%
Yarra Valley and Dandenong Ranges	408	538	527	+5.2% p.a.	-2.1%

\* Please note a change to the regional definition. Further information can be found on the back page.

Domestic Daytrip - Day visitors (or same day visitors) are those who travel for a round trip distance of at least 50 kilometres, are away from home for at least four hours and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home.

Domestic Overnight Visitor - Australians who undertake an overnight trip are referred to as overnight visitors. Overnight trips are defined as trips involving a stay away from home for at least one night, at a place at least 40 kilometres from home.

AAG - Annual Average Growth

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## Year ending December 2000-2015



### DOMESTIC OVERNIGHT VISITOR EXPENDITURE IN VICTORIA

Nominal Expenditure by Domestic Overnight Visitors in Victoria	Total Expenditure					Expenditure Per Night			Expenditure Per Visitor		
	(\$ million)			Ave Ann Change	Yearly Change	\$			\$		
Year ending December	2010	2014	2015	2010-15	2014-15	2010	2014	2015	2010	2014	2015
<b>Total Victoria</b>	<b>9,337</b>	<b>11,522</b>	<b>12,068</b>	<b>+5.3% p.a.</b>	<b>4.7%</b>	<b>182</b>	<b>183</b>	<b>190</b>	<b>569</b>	<b>568</b>	<b>558</b>
<b>Regional Victoria</b>	<b>4,160</b>	<b>4,996</b>	<b>5,034</b>	<b>+3.9% p.a.</b>	<b>0.8%</b>	<b>128</b>	<b>124</b>	<b>125</b>	<b>398</b>	<b>381</b>	<b>365</b>
<b>Victoria's Campaign Regions</b>											
Daylesford and the Macedon Ranges	128	149	227	+12.1% p.a.	51.6%	133	144	172	311	308	398
Geelong and the Bellarine*	389	425	444	+2.7% p.a.	4.5%	128	133	137	434	376	366
Gippsland	459	550	566	+4.3% p.a.	2.9%	102	117	103	301	348	317
Goldfields*	317	427	404	+5.0% p.a.	-5.4%	120	127	122	267	286	290
Grampians	149	250	264	+12.0% p.a.	5.4%	90	119	108	268	309	313
Great Ocean Road*	673	845	830	+4.3% p.a.	-1.8%	150	135	133	456	445	421
<b>Melbourne</b>	<b>5,177</b>	<b>6,525</b>	<b>7,034</b>	<b>+6.3% p.a.</b>	<b>7.8%</b>	<b>276</b>	<b>290</b>	<b>302</b>	<b>802</b>	<b>838</b>	<b>834</b>
Mornington Peninsula	349	405	481	+6.6% p.a.	18.6%	127	96	112	385	303	331
Murray	662	875	763	+2.9% p.a.	-12.8%	118	128	131	386	400	356
Phillip Island	268	300	254	-1.1% p.a.	-15.4%	121	118	120	393	355	315
Victoria's High Country	590	517	548	-1.5% p.a.	6.2%	177	126	141	540	404	391
Yarra Valley and Dandenong Ranges	175	247	221	+4.8% p.a.	-10.4%	142	133	124	338	323	297

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### DOMESTIC DAYTRIP EXPENDITURE IN VICTORIA

Nominal Expenditure by Domestic Daytrip Visitors in Victoria	Total Expenditure					Per Visit Daytrip		
	(\$ million)			Ave Ann Change	Yearly Change	(\$)		
	2010	2014	2015	2010-15	2014-15	2010	2014	2015
Year ending December								
<b>Total Victoria</b>	<b>3,668</b>	<b>4,701</b>	<b>4,495</b>	<b>+4.2% p.a.</b>	<b>-4.4%</b>	<b>91</b>	<b>106</b>	<b>98</b>
<b>Regional Victoria</b>	<b>2,123</b>	<b>2,871</b>	<b>2,702</b>	<b>+4.9% p.a.</b>	<b>-5.9%</b>	<b>84</b>	<b>103</b>	<b>90</b>
<b>Victoria's Campaign Regions</b>								
Daylesford and the Macedon Ranges	97	115	147	+8.6% p.a.	27.5%	68	71	82
Geelong and the Bellarine*	217	256	283	+5.4% p.a.	10.4%	76	83	87
Gippsland	259	251	235	-1.9% p.a.	-6.5%	92	100	71
Goldfields*	336	424	341	+0.3% p.a.	-19.5%	92	114	93
Grampians	57	170	135	+19.0% p.a.	-20.5%	75	161	101
Great Ocean Road*	218	263	258	+3.4% p.a.	-1.8%	99	101	95
<b>Melbourne</b>	<b>1,545</b>	<b>1,830</b>	<b>1,793</b>	<b>+3.0% p.a.</b>	<b>-2.0%</b>	<b>103</b>	<b>112</b>	<b>112</b>
Mornington Peninsula	241	387	338	+7.0% p.a.	-12.6%	80	93	83
Murray	256	458	434	+11.1% p.a.	-5.2%	87	153	150
Phillip Island	78	103	95	+4.2% p.a.	-7.1%	84	100	82
Victoria's High Country	130	153	131	+0.2% p.a.	-14.7%	101	100	81
Yarra Valley and Dandenong Ranges	233	291	306	+5.6% p.a.	4.9%	69	81	75

\* Please note a change to the regional definition. Further information can be found on the back page.

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### **New methodology commenced in January 2014**

The National Visitor Survey methodology has changed to include interviews on mobile phones, in addition to landlines, as of January 2014 to accommodate the growing incidence of households without landlines, particularly among younger segments of the population.

**December 2015 is the first year that like-for-like comparisons can be drawn with the results for December 2014.**

Like-for-like comparisons for year-on-year growth can be undertaken for the December 2015 release (i.e. December 2015 compared to December 2014). This provides two full years of data that have been captured under the new methodology.

However, comparisons with results preceding the introduction of the new methodology (2000–2013) should be used with caution. Interpretation of these results should focus on comparisons of relative performance against other states (e.g. New South Wales, Queensland) and the national average, rather than absolute rates of growth.

### **\* There were the following definitional changes in 2015:**

- 'Golden Plains - North' and 'Smythes Creek' SA2s are now included in the Ballarat sub-region (were previously in the Western sub-region).
- 'Golden Plains - South' and 'Bannockburn' SA2s are now included in the Geelong and the Bellarine region (were previously in the Western sub-region).
- In addition to this, 'Western' sub-region is now called 'Great Ocean Road' sub-region/region and 'Geelong' sub-region is now called 'Geelong and the Bellarine' sub-region/region.

*All back data has been adjusted to reflect this change.*

- Expenditure data for Ballarat (therefore also impacting the Goldfields region totals), Geelong and the Bellarine and Great Ocean Road uses modelled data based on the new boundary definitions.

The definition of an SA2 is on the Australian Bureau of Statistics website:

<http://www.abs.gov.au/ausstats/abs@.nsf/Latestproducts/88F6A0EDEB8879C0CA257801000C64D9>