

TOURISM IN MELBOURNE'S WEST

1. Tourism Research Australia (TRA) data analysed for Melbourne's West

- Domestic overnight and domestic daytrip visitors
- International visitors

2. Definitions

- **Domestic Daytrip Visitors** – Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 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.
- **Domestic Overnight Visitors** – People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors.

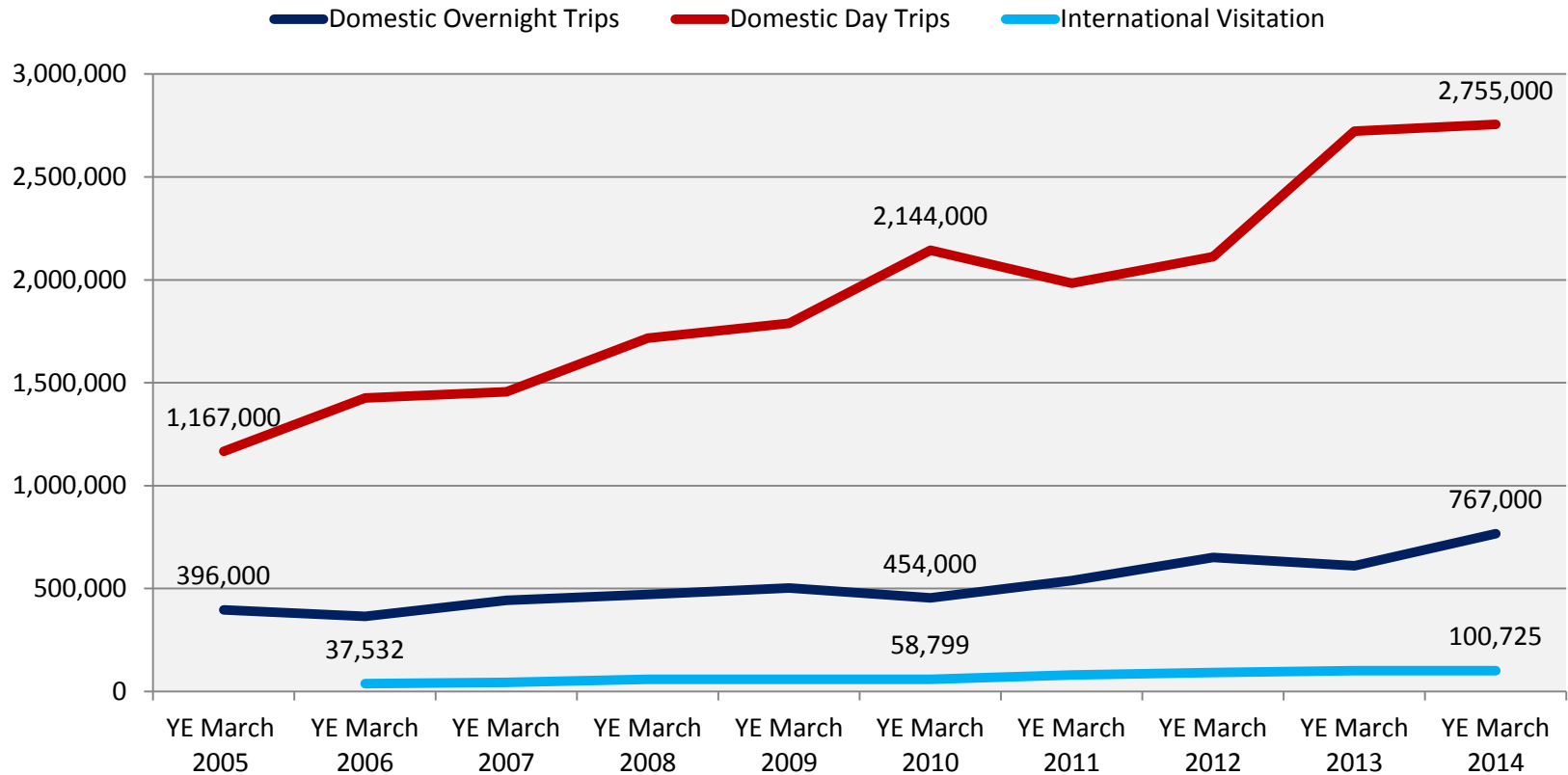
3. Notes

- Data collated is to the year ending March 2014.
- Due to sample size, only regional level data is available with adequate error margins
- The regional data area may somewhat skew the data toward the VFR market

TOURISM IN MELBOURNE'S WEST - VISITATION

- More than 3.6 million people visited Melbourne's West in 2014 (year ending March).
- Domestic day trips increased by 1% between 2013 and 2014.

Figure 1: Domestic and International Visitation to Melbourne's West – 2005 to 2014 (year ending March)

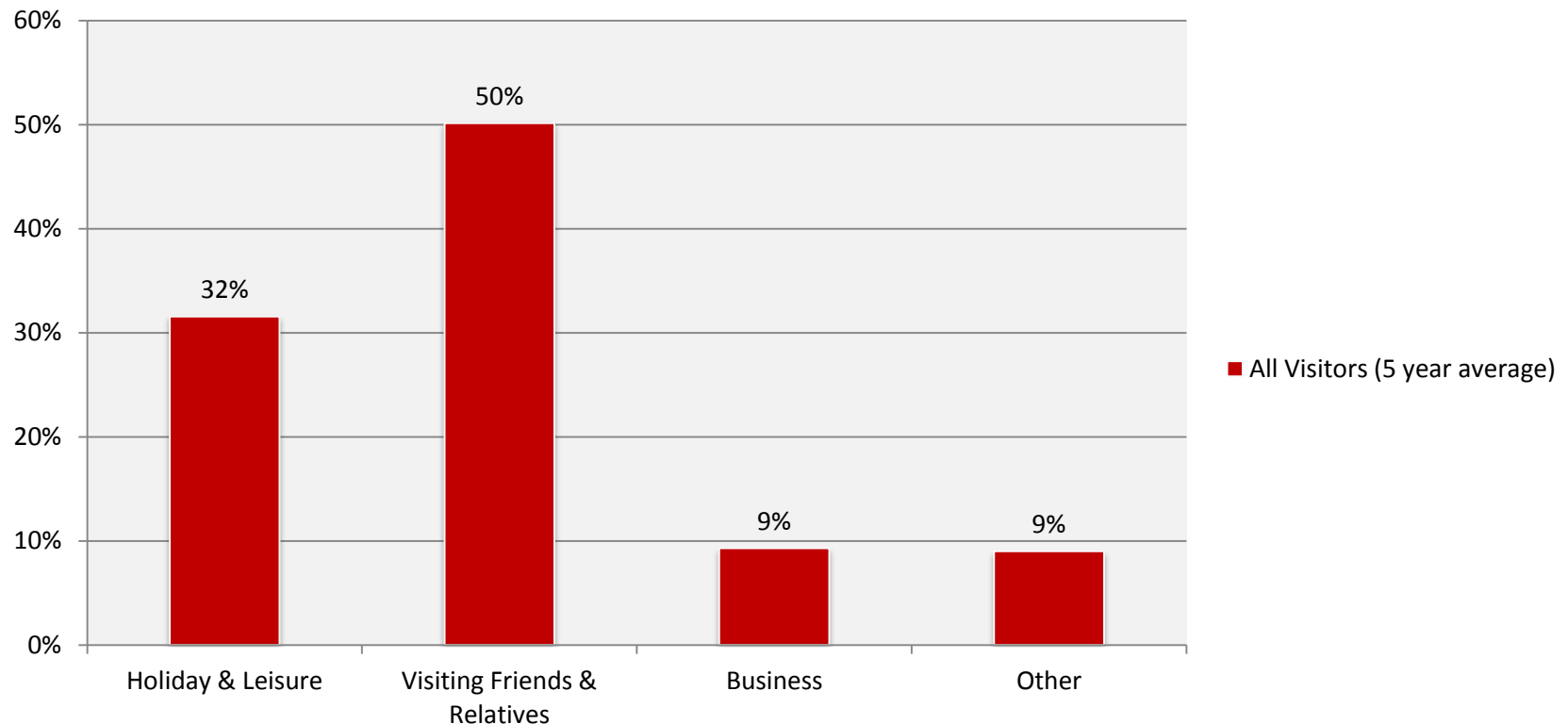


Source: Tourism Research Australia, National Visitors Survey, International Visitors Survey, 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST - VISITATION

- Half of the total visitation between 2010 and 2014 was people visiting friends and relatives, followed by over 30% visiting for holiday and leisure purposes.

Figure 2: Proportion of Total Visitation by Purpose of Visit (5 year average)

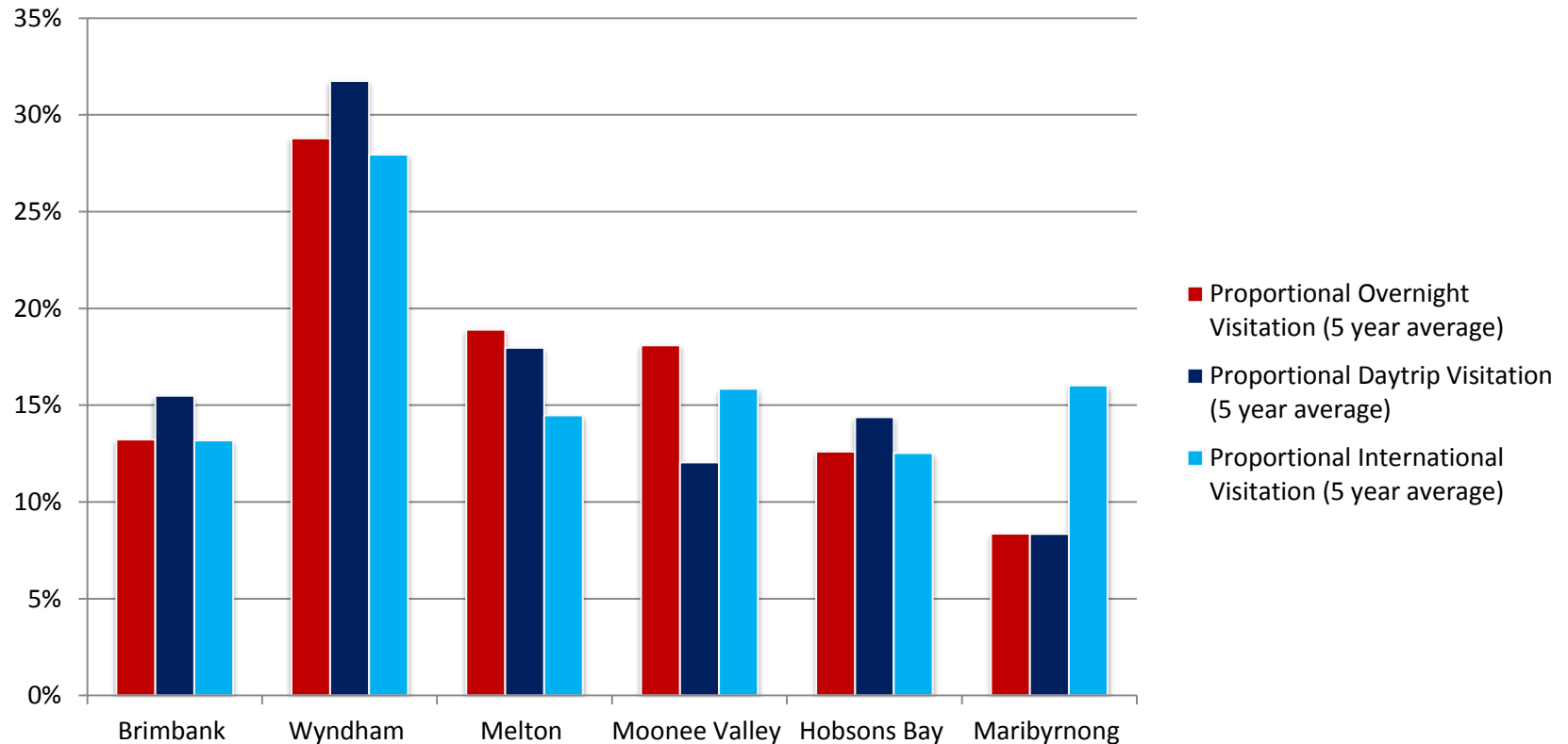


Source: Tourism Research Australia, National Visitors Survey, International Visitors Survey, 2014
Data compiled by Urban Enterprise 2014
Graph excludes international visitors who were 'in transit'

TOURISM IN MELBOURNE'S WEST - VISITATION

- Wyndham receives the highest proportion of overnight, daytrip and international visitation in Western Melbourne

Figure 3: Proportional LGA Visitation to Melbourne's West



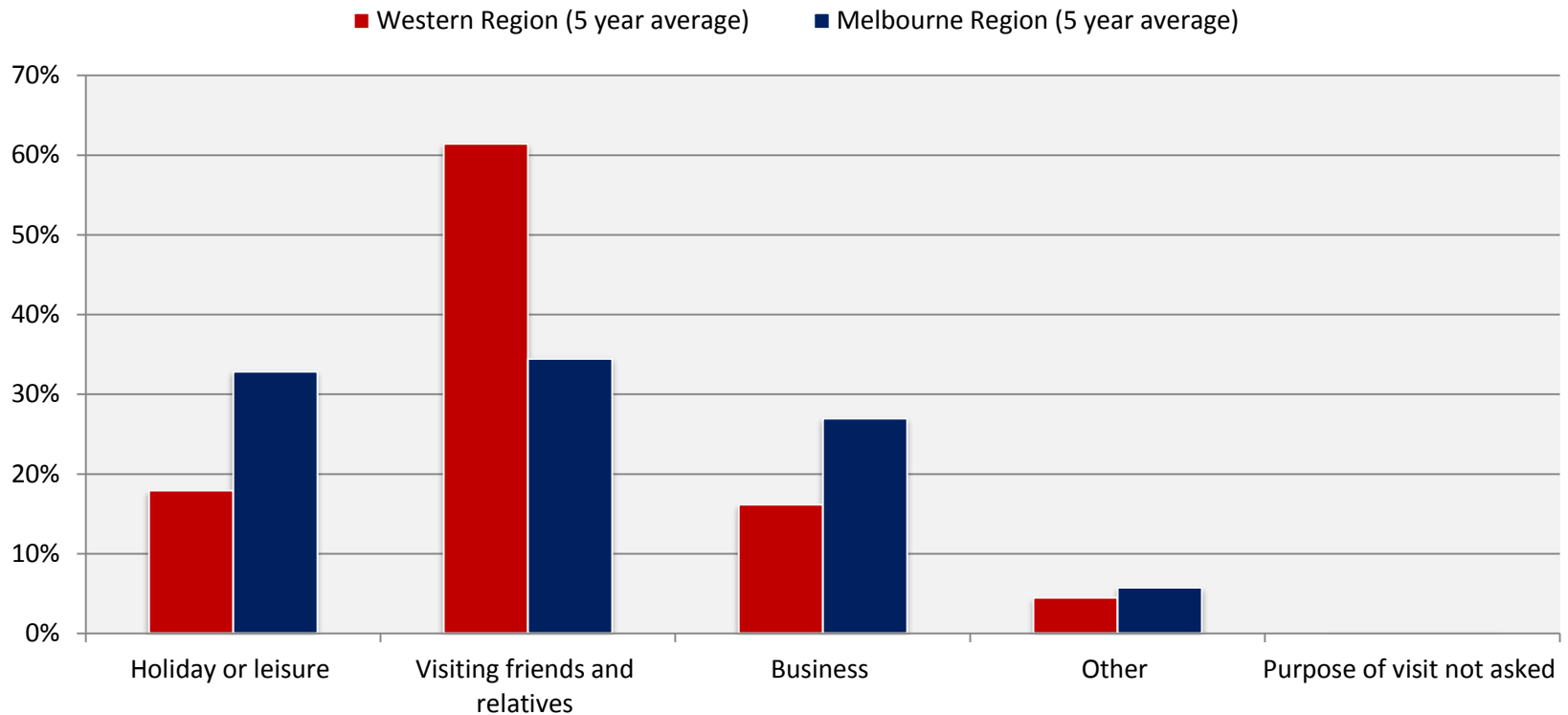
Note: Relatively low survey sample size for individual LGAs, some caution should be taken with reliability of data

Source: Tourism Research Australia, National Visitors Survey, International Visitors Survey
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- A higher proportion of domestic overnight visitors to Melbourne's West are visiting friends and relatives compared to metropolitan Melbourne.
- Less domestic overnight visitors are visiting Melbourne's West for holiday / leisure or business.

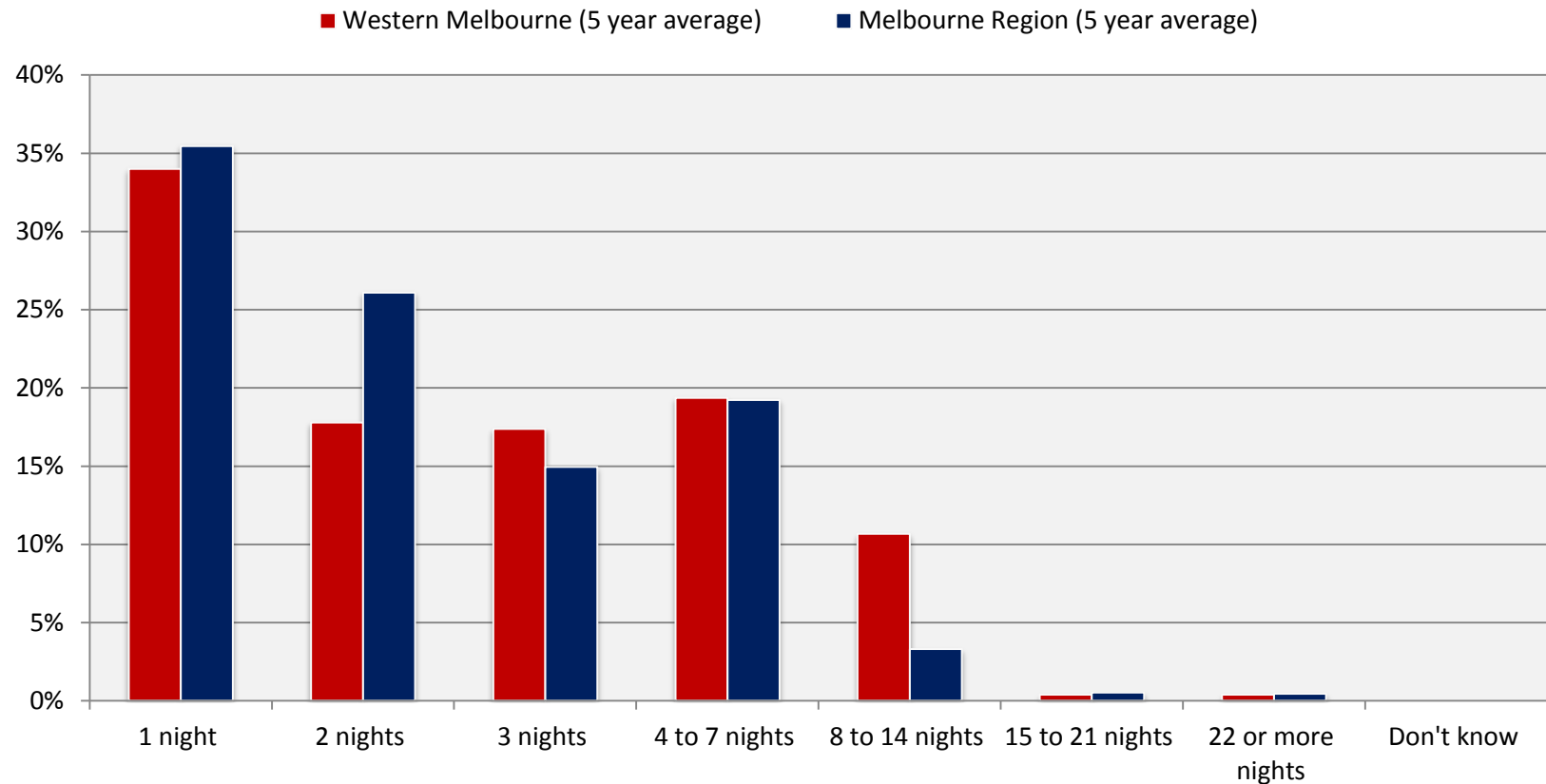
Figure 4: Domestic Overnight Visitors - Purpose of Visit



TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- The majority of domestic overnight visitors are staying for 1 night.

Figure 5: Domestic Overnight Visitors - Length of Stay

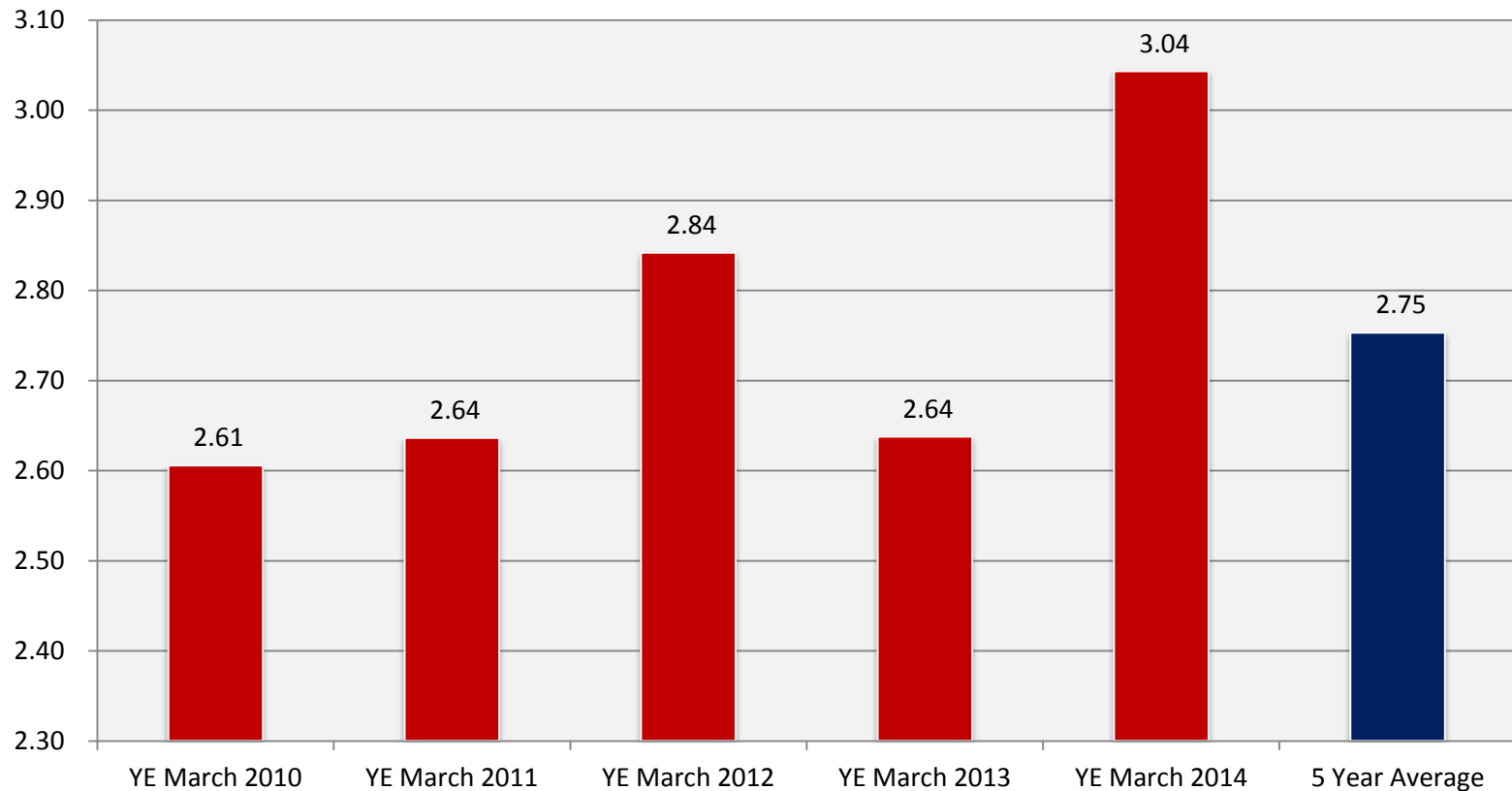


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- The average length of stay for domestic overnight visitors to Melbourne's West is 2.75 nights (5 year average).

Figure 6: Domestic Overnight Visitors – Average Length of Stay

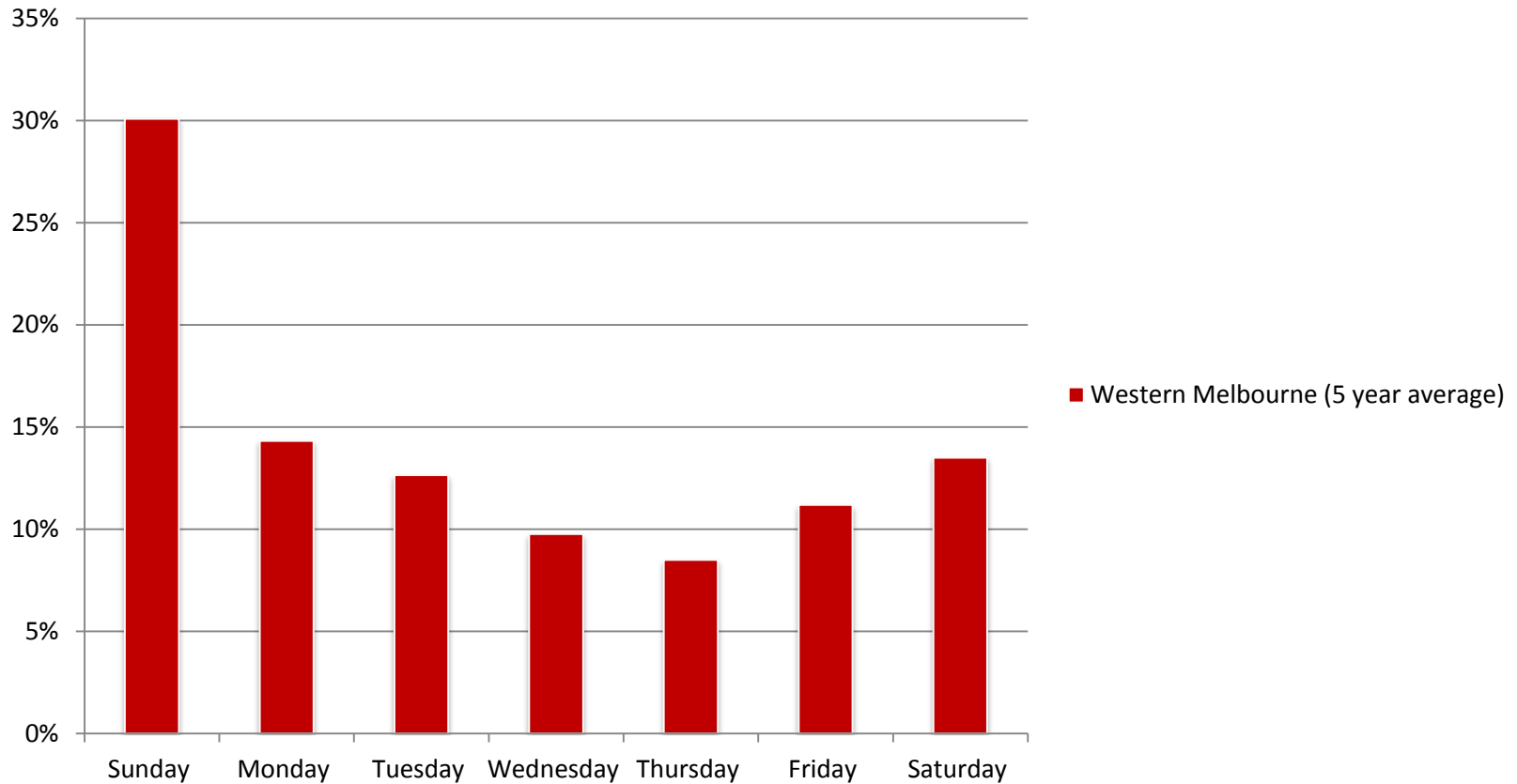


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- The majority of domestic overnight visitors return from their trip on a Sunday, followed by a Saturday.

Figure 7: Domestic Overnight Visitors – Day Returned from Trip

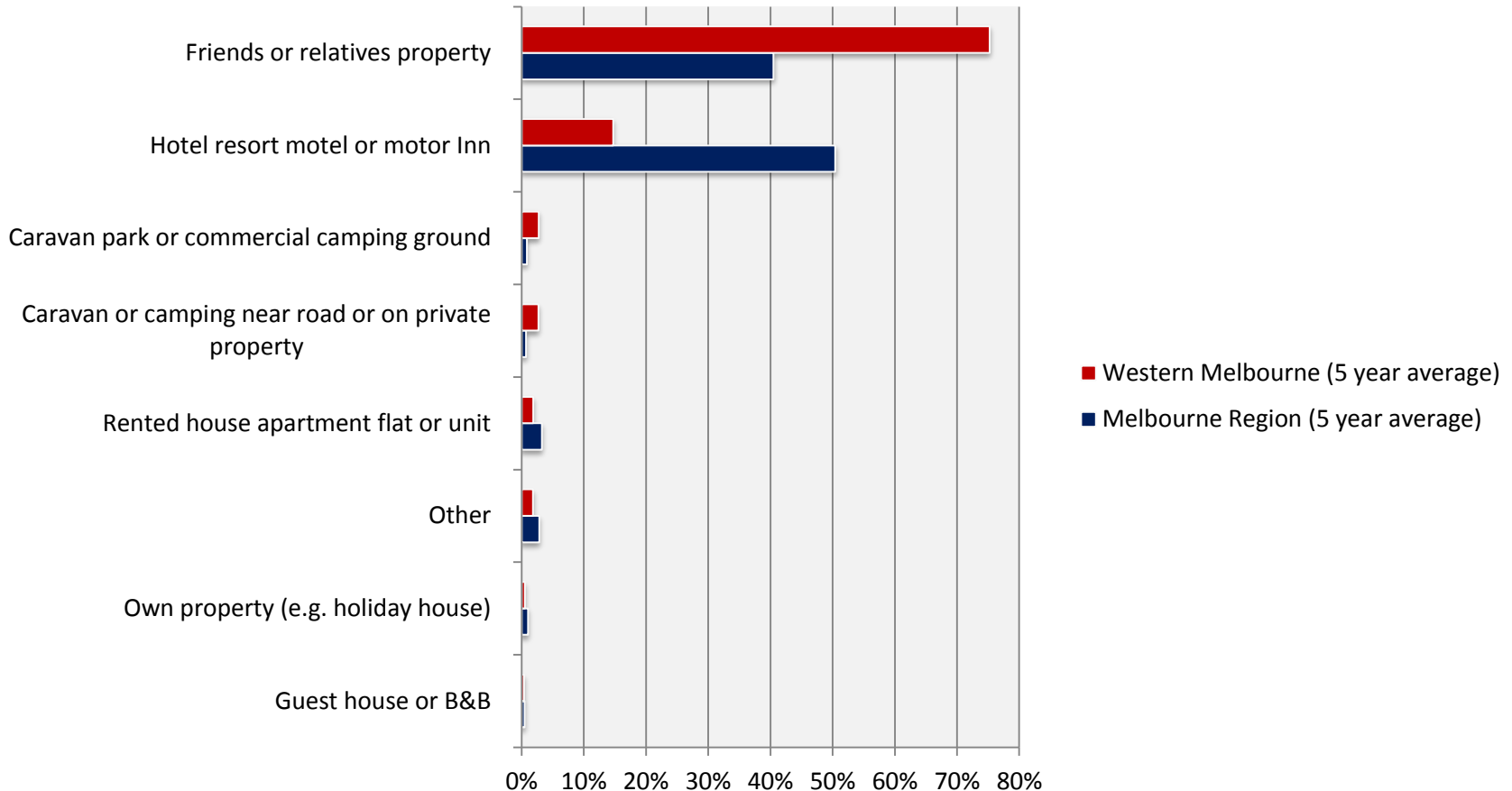


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- A higher proportion of domestic overnight visitors are staying with friends and relatives compared to metropolitan Melbourne.

Figure 8: Domestic Overnight Visitors - Accommodation

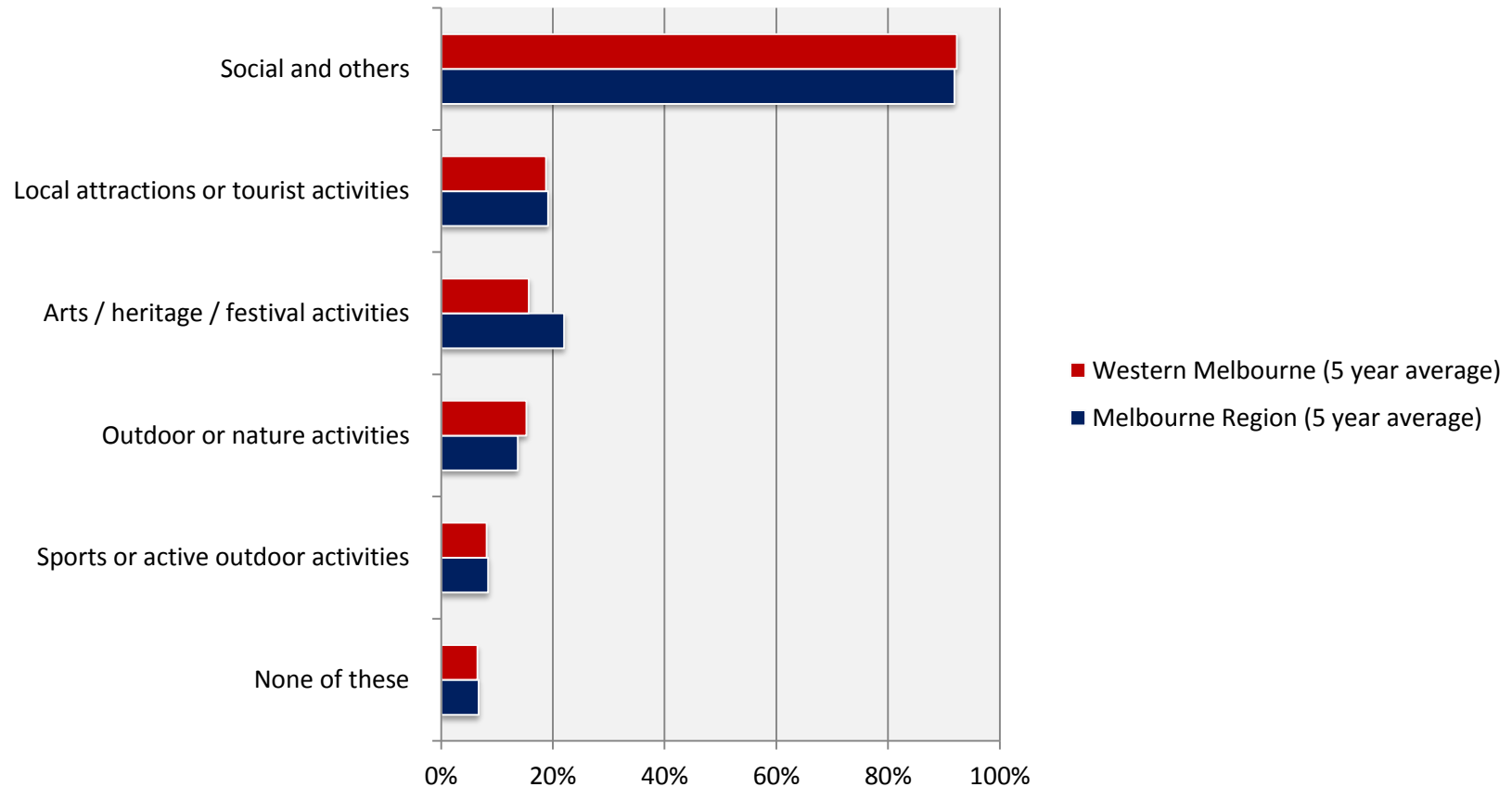


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- Domestic overnight visitors to Western Melbourne are undertaking comparable activities with visitors to the Melbourne Region.

Figure 9: Domestic Overnight Visitors - Activities

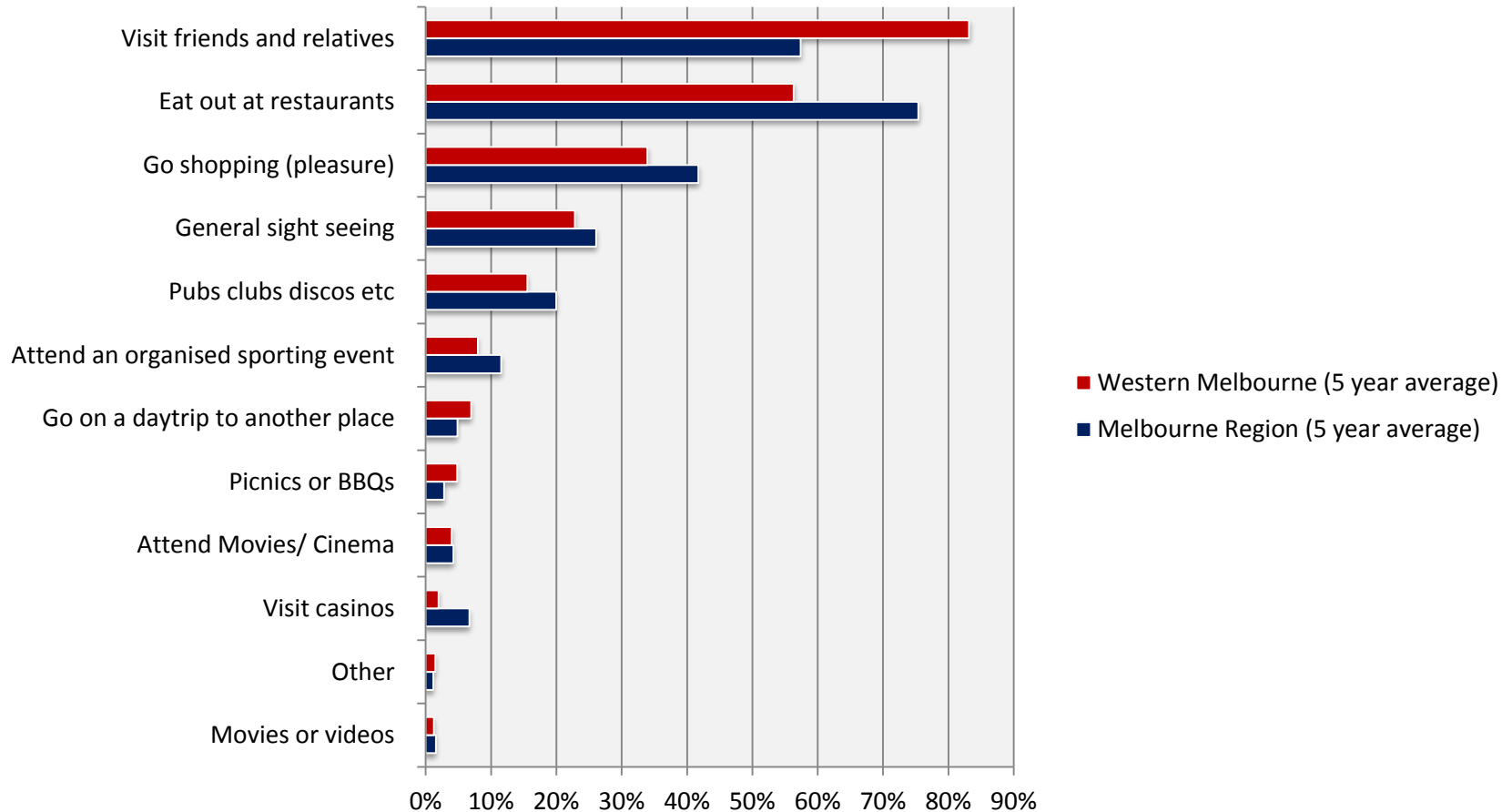


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- A higher proportion of domestic overnight visitors to Western Melbourne are visiting friends and relatives compared to the Melbourne Region.

Figure 10: Domestic Overnight Visitors – Breakdown of Social Activities Undertaken



Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

Table 1: Domestic Overnight Visitors – Origin

- The majority of domestic overnight visitors originate in Victoria (56%), followed by New South Wales (20%).

State	% Origin (5 year average)
Victoria	56%
<i>Melbourne</i>	22%
<i>Ballarat</i>	4%
<i>Bendigo Loddon</i>	9%
<i>Central Highlands</i>	1%
<i>Central Murray</i>	4%
<i>Geelong</i>	7%
<i>Gippsland</i>	7%
<i>Goulburn</i>	6%
<i>High Country</i>	5%
<i>Lakes</i>	2%
<i>Macedon</i>	3%
<i>Mallee</i>	4%
<i>Melbourne East</i>	4%
<i>Murray East</i>	3%
<i>Peninsula</i>	4%
<i>Phillip Island</i>	2%
<i>Spa Country</i>	1%
<i>Upper Yarra</i>	0%
<i>Western</i>	7%
<i>Western Grampians</i>	2%
<i>Wimmera</i>	1%
New South Wales	20%
Queensland	9%
South Australia	6%
Western Australia	3%
Tasmania	4%
Northern Territory	1%
ACT	1%

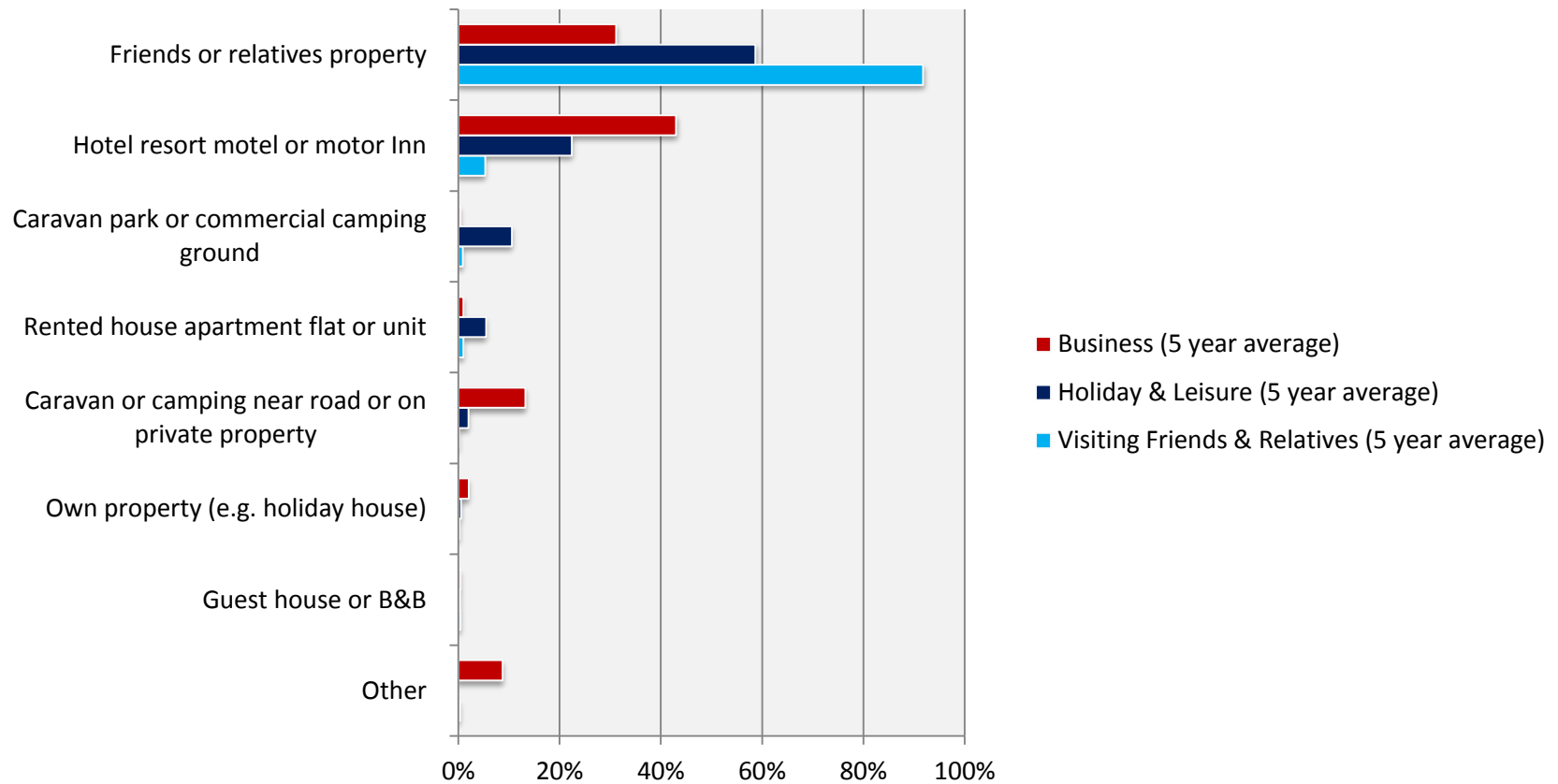
Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014

Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- A high proportion of all visitors stay with friends /relatives.
- Business travellers and holiday and leisure visitors have a higher propensity to stay in commercial accommodation

Figure 11: Domestic Overnight Visitors – Breakdown of Accommodation by Holiday & Leisure, Visiting Friends and Relatives and Business Markets

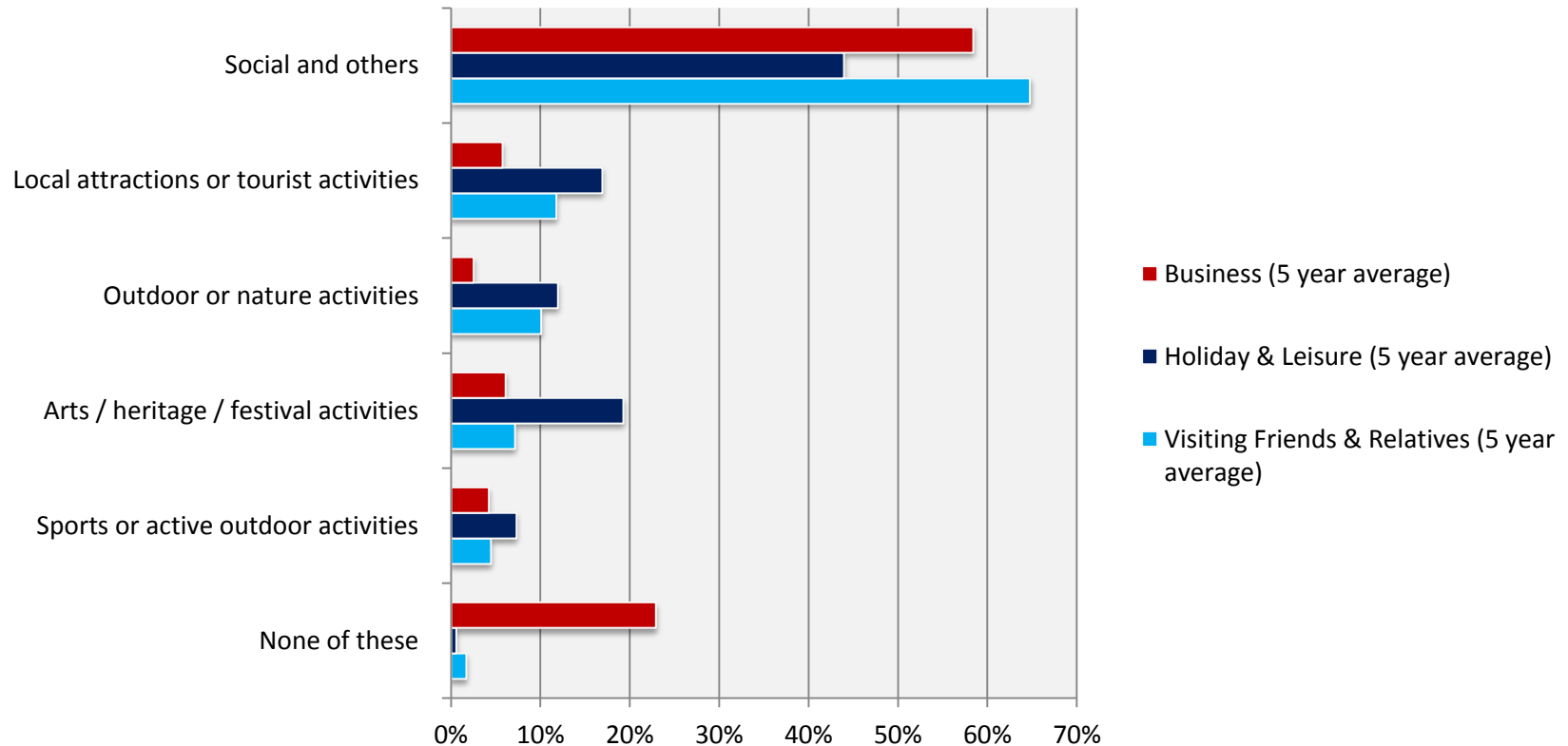


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC OVERNIGHT VISITORS

- The proportion of Holiday & Leisure visitors undertaking social activities is less compared with the VFR and Business market.
- Holiday & Leisure visitors undertake more general tourist activities compared to the VFR and Business market.

Figure 12: Domestic Overnight Visitors – Breakdown of Activities by Holiday & Leisure, Visiting Friends and Relatives and Business Markets

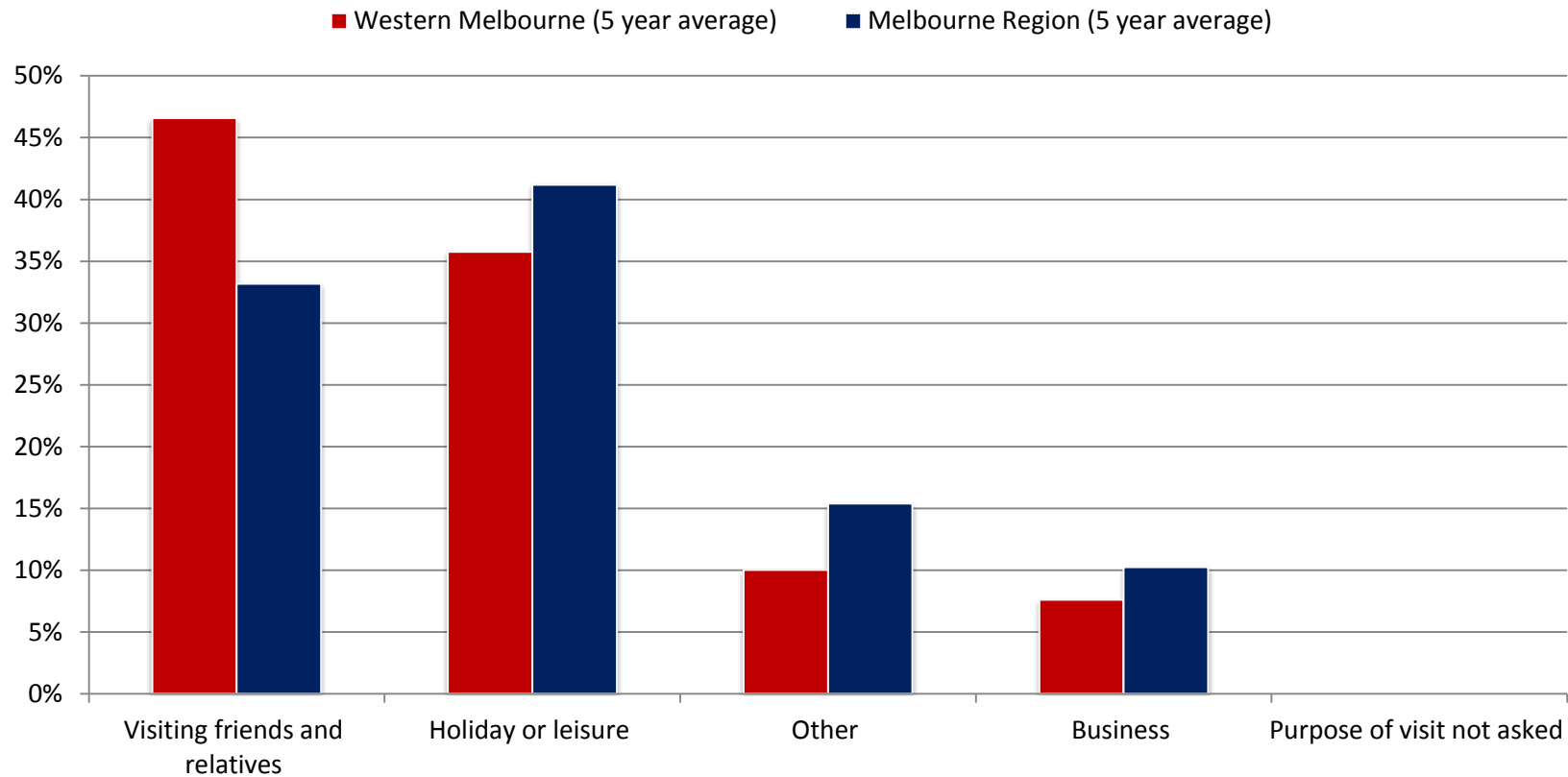


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC DAYTRIP VISITORS

- A higher proportion of domestic daytrip visitors are visiting friends and relatives compared to metropolitan Melbourne, a smaller proportion are visiting for holiday or leisure.

Figure 13: Domestic Daytrip Visitors - Purpose of Visit

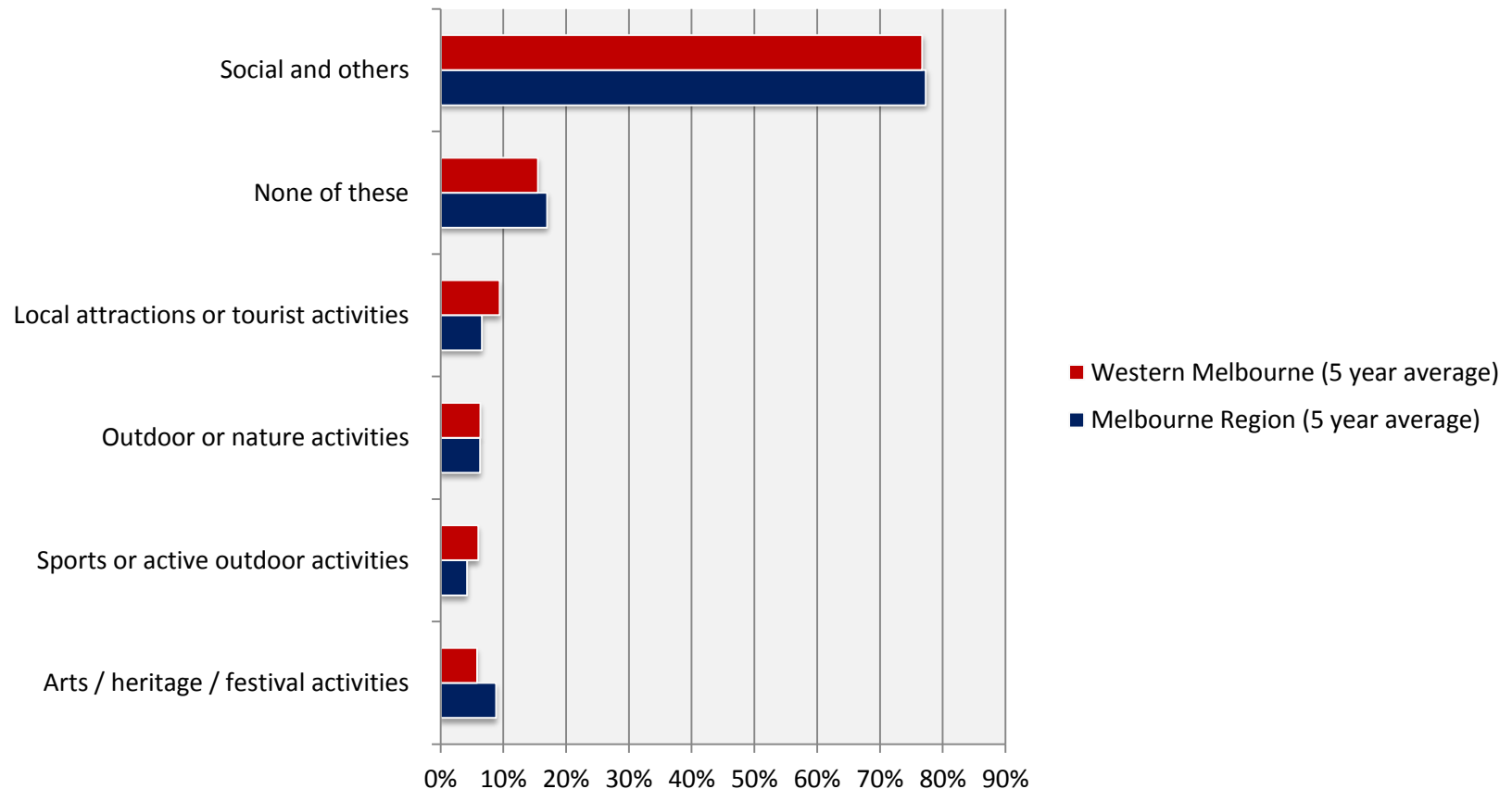


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC DAYTRIP VISITORS

- Daytrip visitors to Western Melbourne undertake similar activities to daytrip visitors to the Melbourne region.

Figure 14: Domestic Daytrip Visitors - Activities

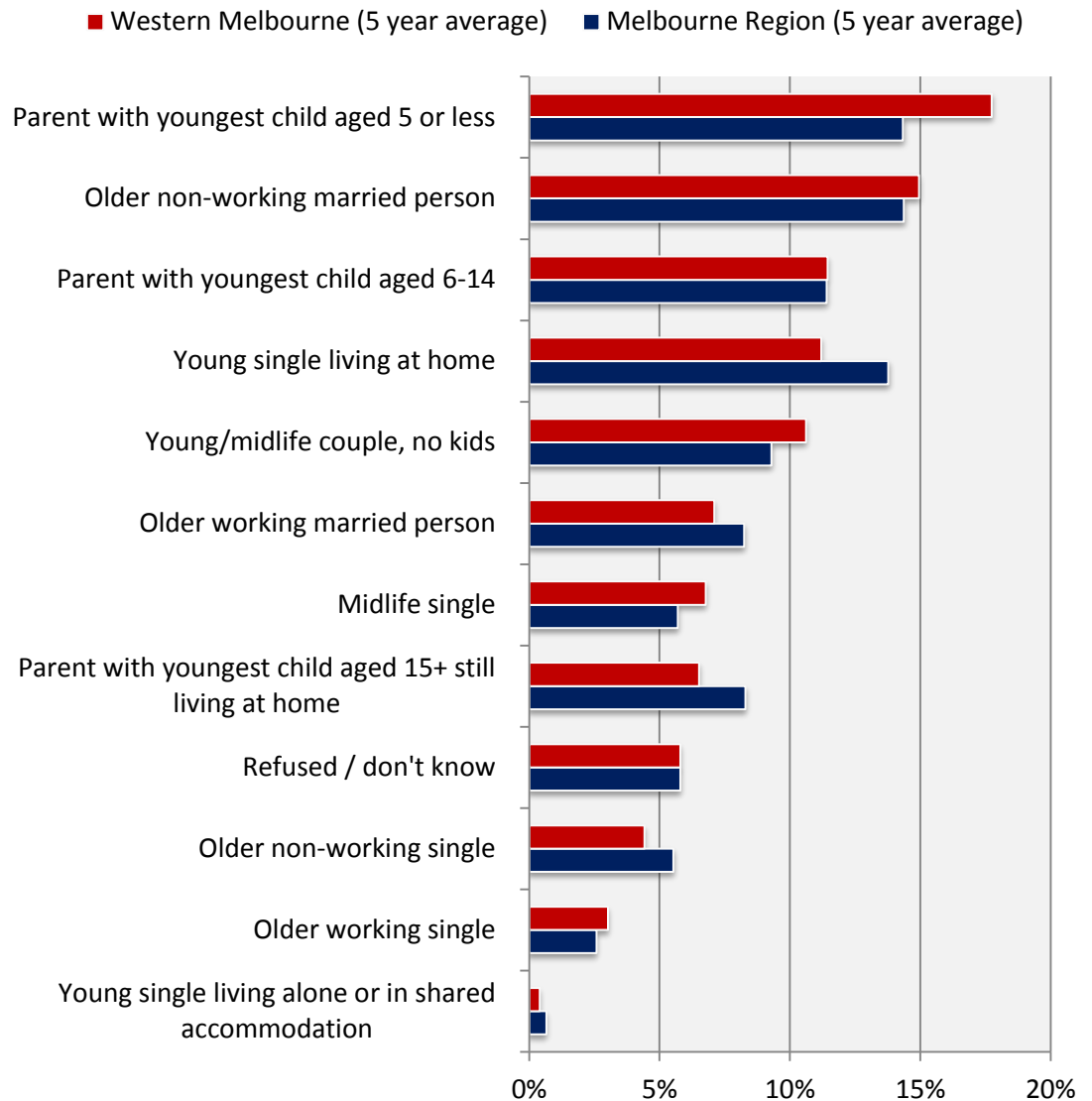


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC DAYTRIP VISITORS

Figure 15: Domestic Daytrip Visitors – Lifecycle Group

- Parent/s with youngest child aged 5 or less is the most common daytrip visitor, followed by older non-working married persons.
- Melbourne region attracts a slightly higher proportion of young single persons, living at home.



Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC DAYTRIP VISITORS

Table 2: Domestic Daytrip Visitors – Origin

- 56% of daytrip visitors originate in Melbourne, followed by Geelong (8%), Melbourne East (7%), Peninsula (6%) & Macedon (6%).

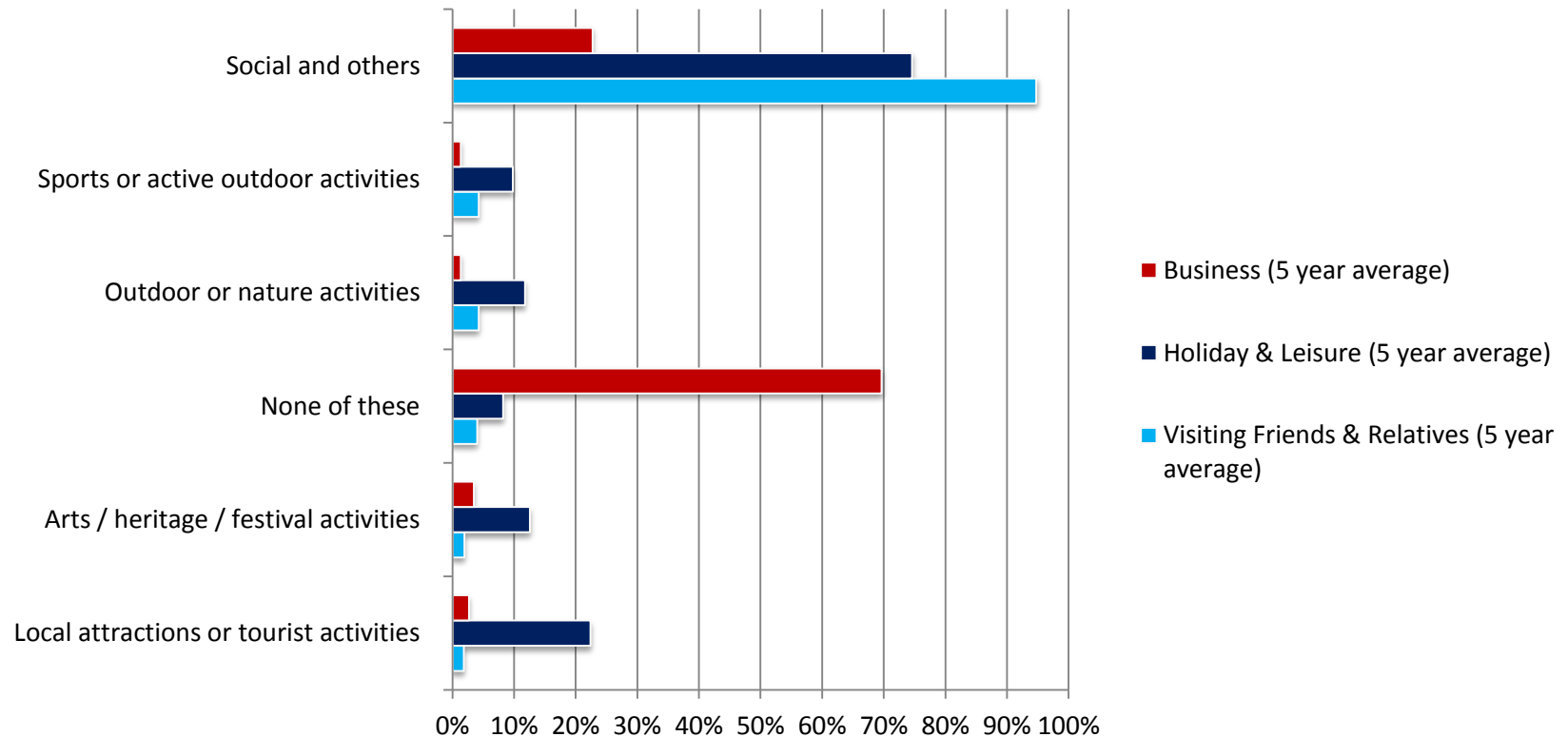
State/Region	% Origin (5 year average)
Victoria	98%
<i>Melbourne</i>	56%
<i>Ballarat</i>	3%
<i>Bendigo Loddon</i>	4%
<i>Central Highlands</i>	0%
<i>Central Murray</i>	0%
<i>Geelong</i>	8%
<i>Gippsland</i>	1%
<i>Goulburn</i>	1%
<i>High Country</i>	0%
<i>Lakes</i>	0%
<i>Macedon</i>	6%
<i>Mallee</i>	0%
<i>Melbourne East</i>	7%
<i>Murray East</i>	0%
<i>Peninsula</i>	6%
<i>Phillip Island</i>	0%
<i>Spa Country</i>	1%
<i>Upper Yarra</i>	1%
<i>Western</i>	2%
<i>Western Grampians</i>	0%
<i>Wimmera</i>	0%
New South Wales	1%
Queensland	0%
South Australia	0%
Western Australia	0%
Tasmania	0%
Northern Territory	0%
ACT	0%

Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – DOMESTIC DAYTRIP VISITORS

- Holiday & Leisure and VFR daytrip visitors have a higher propensity to undertake social and other activities compared to business daytrip visitors.
- Holiday & Leisure daytrip visitors are more likely to undertake general tourist activities

Figure 16: Domestic Daytrip Visitors – Breakdown of Activities by Holiday and Leisure, Visiting Friends & Relatives and Business Markets

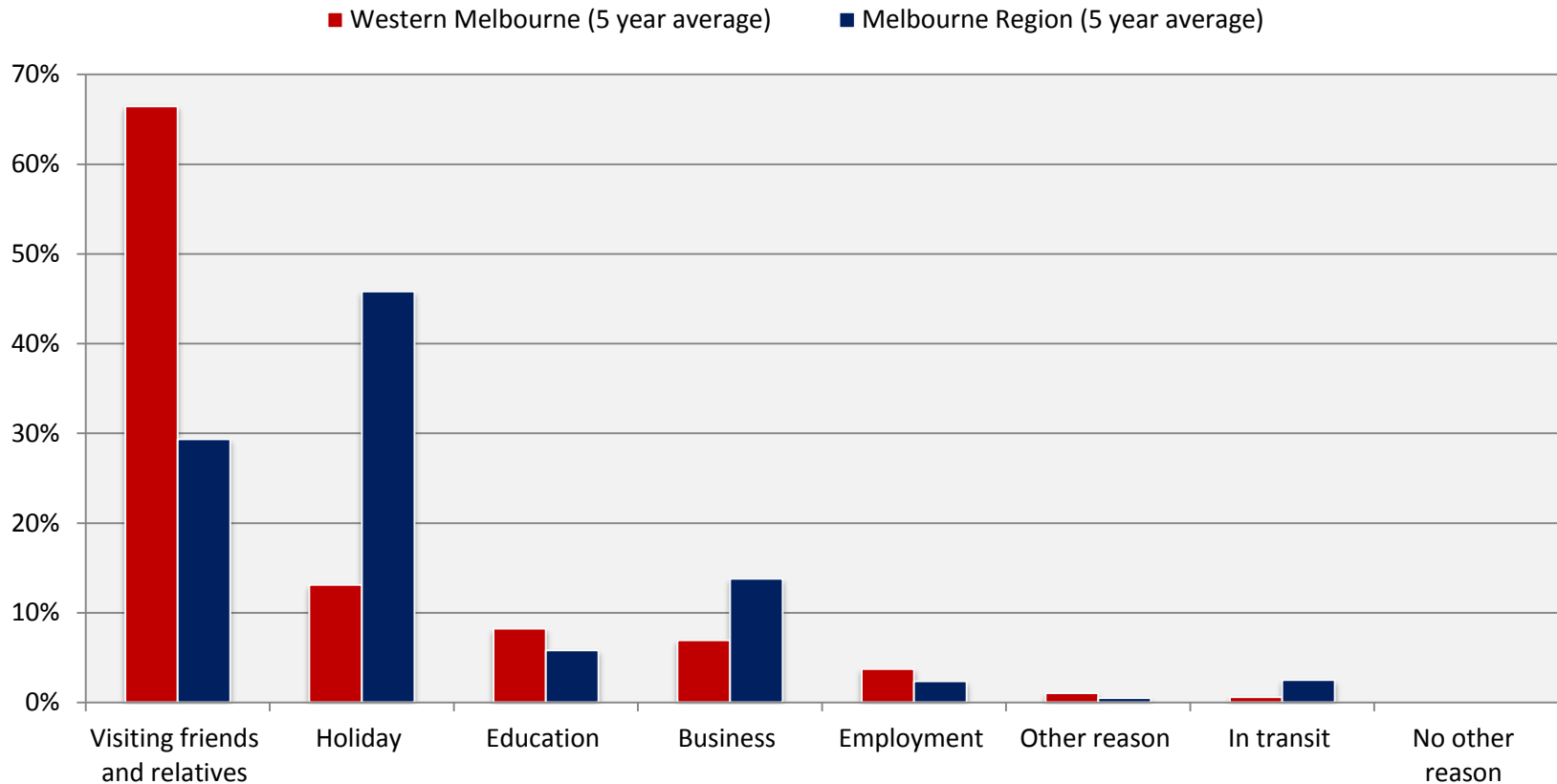


Source: Tourism Research Australia, National Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

- A higher proportion of international visitors are visiting Western Melbourne to visit friends and relatives compared to the Melbourne region.
- Less international visitors are visiting for a holiday compared to the Melbourne region.

Figure 17: International Visitors – Reason for Stopover

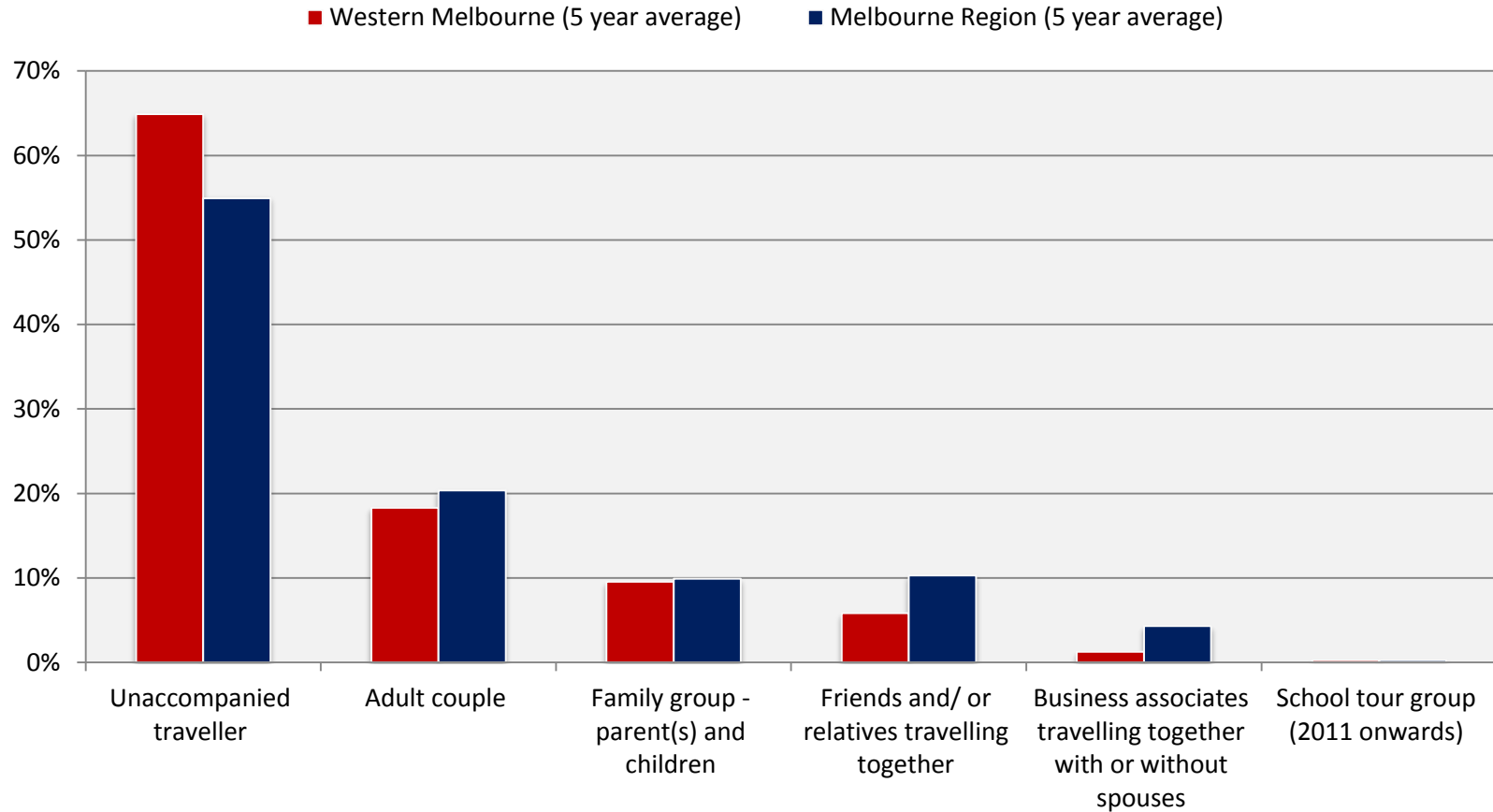


Source: Tourism Research Australia, International Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

- A large proportion of international visitors are unaccompanied travellers.

Figure 18: International Visitors – Travel Party Type

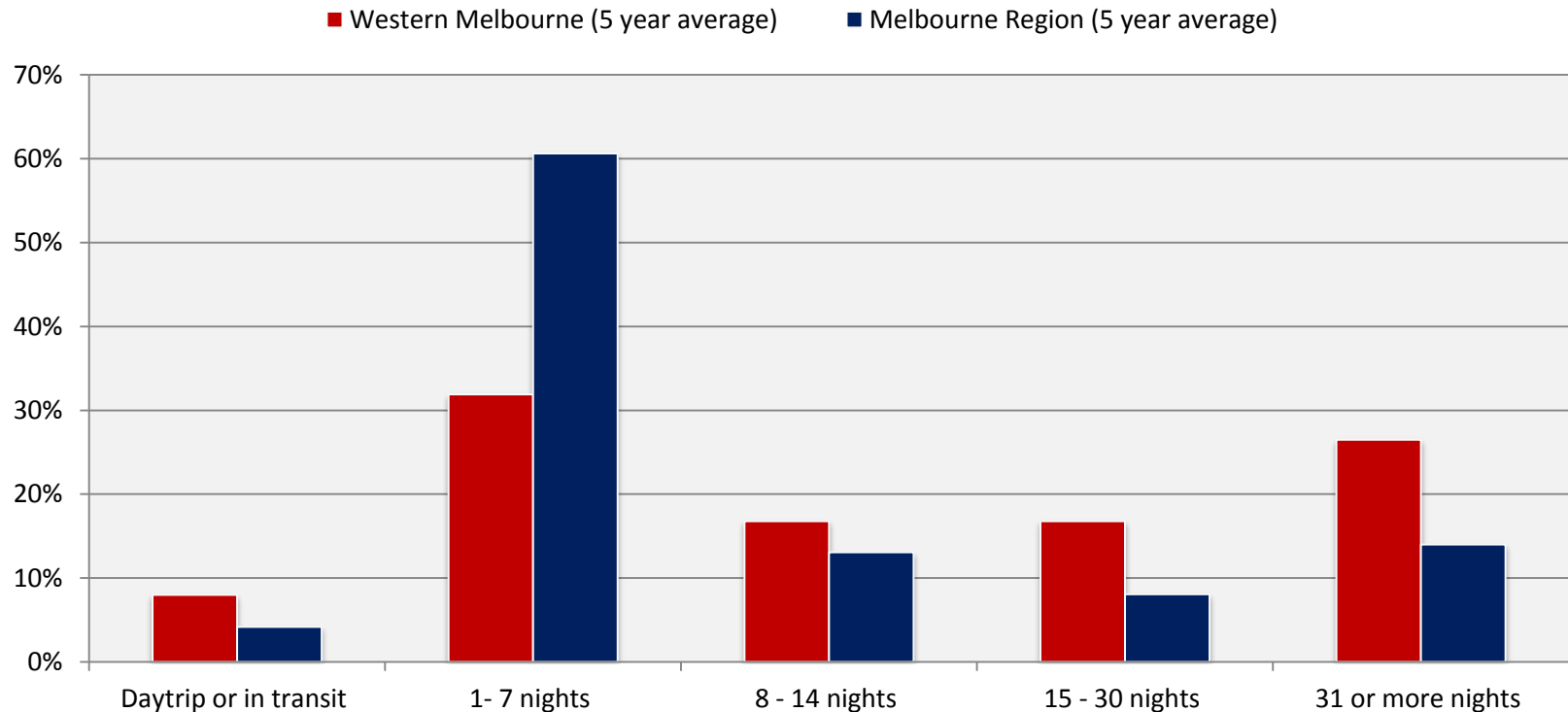


Source: Tourism Research Australia, International Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

- International visitors to Western Melbourne generally stay for a longer period of time compared to International visitors to Melbourne region.
- Only 8% of international visitors were undertaking daytrips to Western Melbourne

Figure 19: International Visitors – Length of Visit

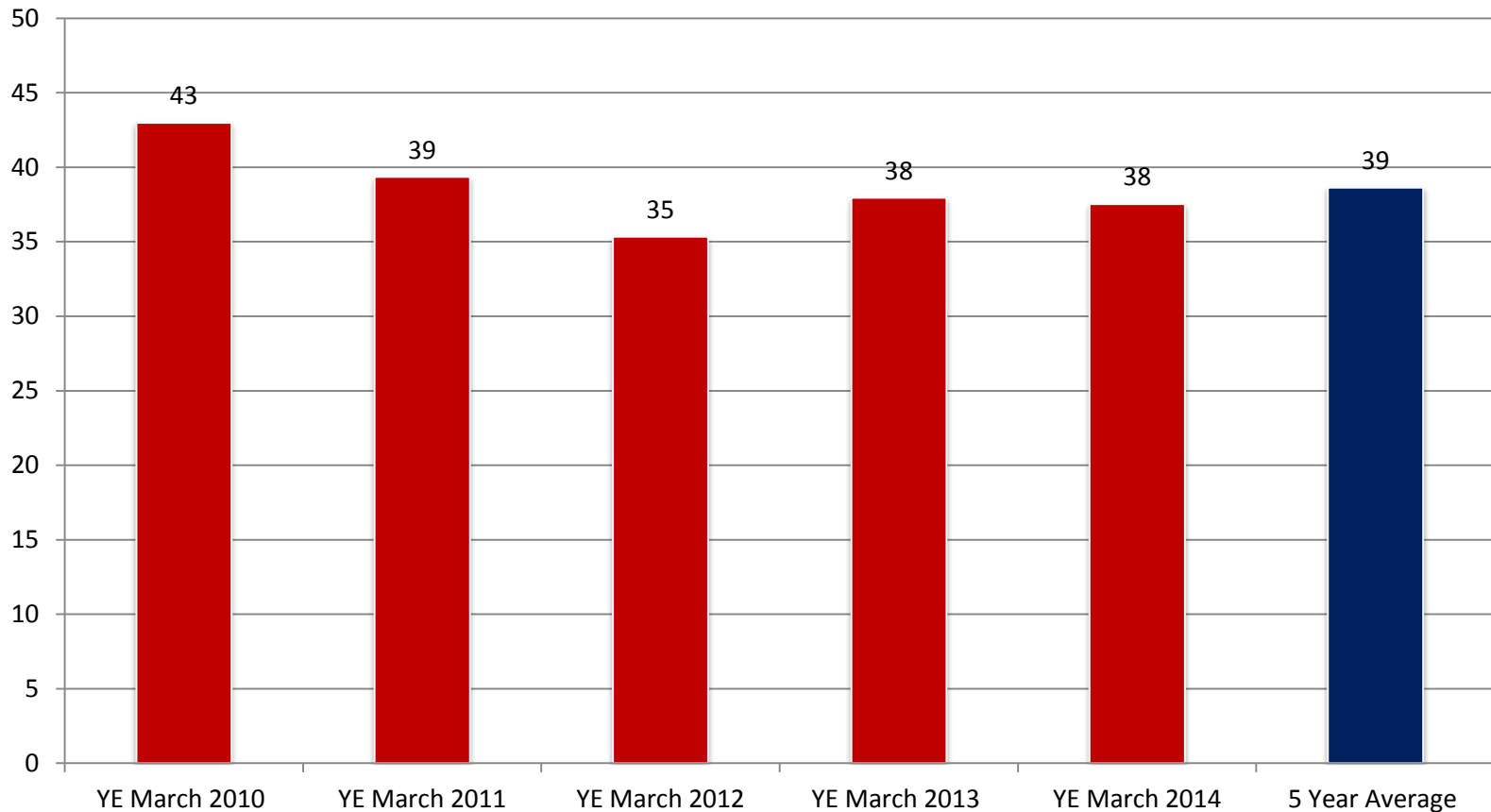


Source: Tourism Research Australia, International Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

- International visitors to Western Melbourne stayed an average of 39 nights (5 year average).

Figure 20: International Visitors – Average Length of Visit

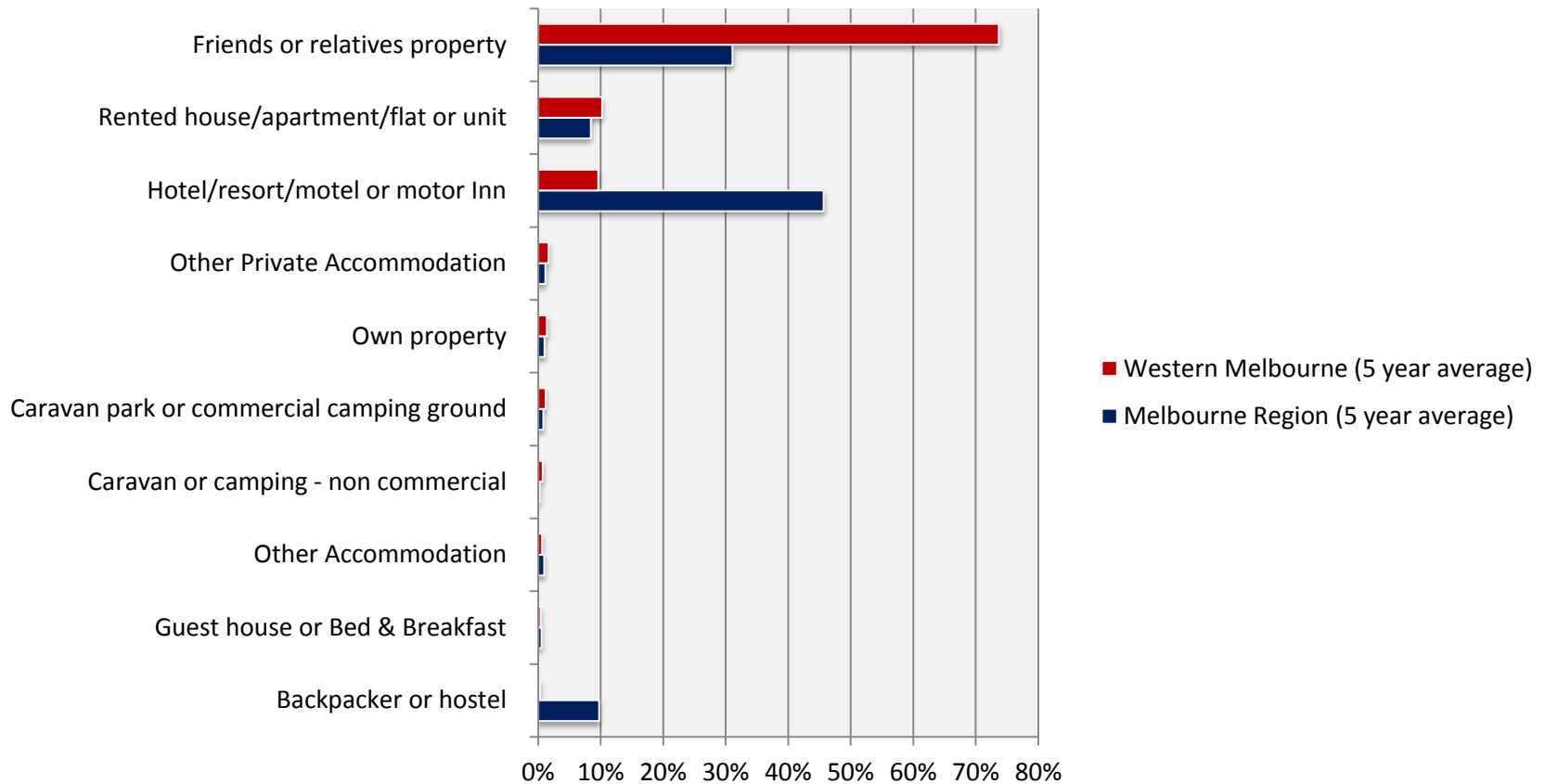


Source: Tourism Research Australia, International Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

- A higher proportion of international visitors are staying at the home of a friend or relative compared to the Melbourne region.
- A smaller proportion are staying in a rented house / apartment / unit / flat.

Figure 21: International Visitors – Accommodation



Source: Tourism Research Australia, International Visitors Survey. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

Table 3: International Visitors – Country of Origin

- A higher proportion of international visitors to Western Melbourne originate from New Zealand
- A smaller proportion originate from China

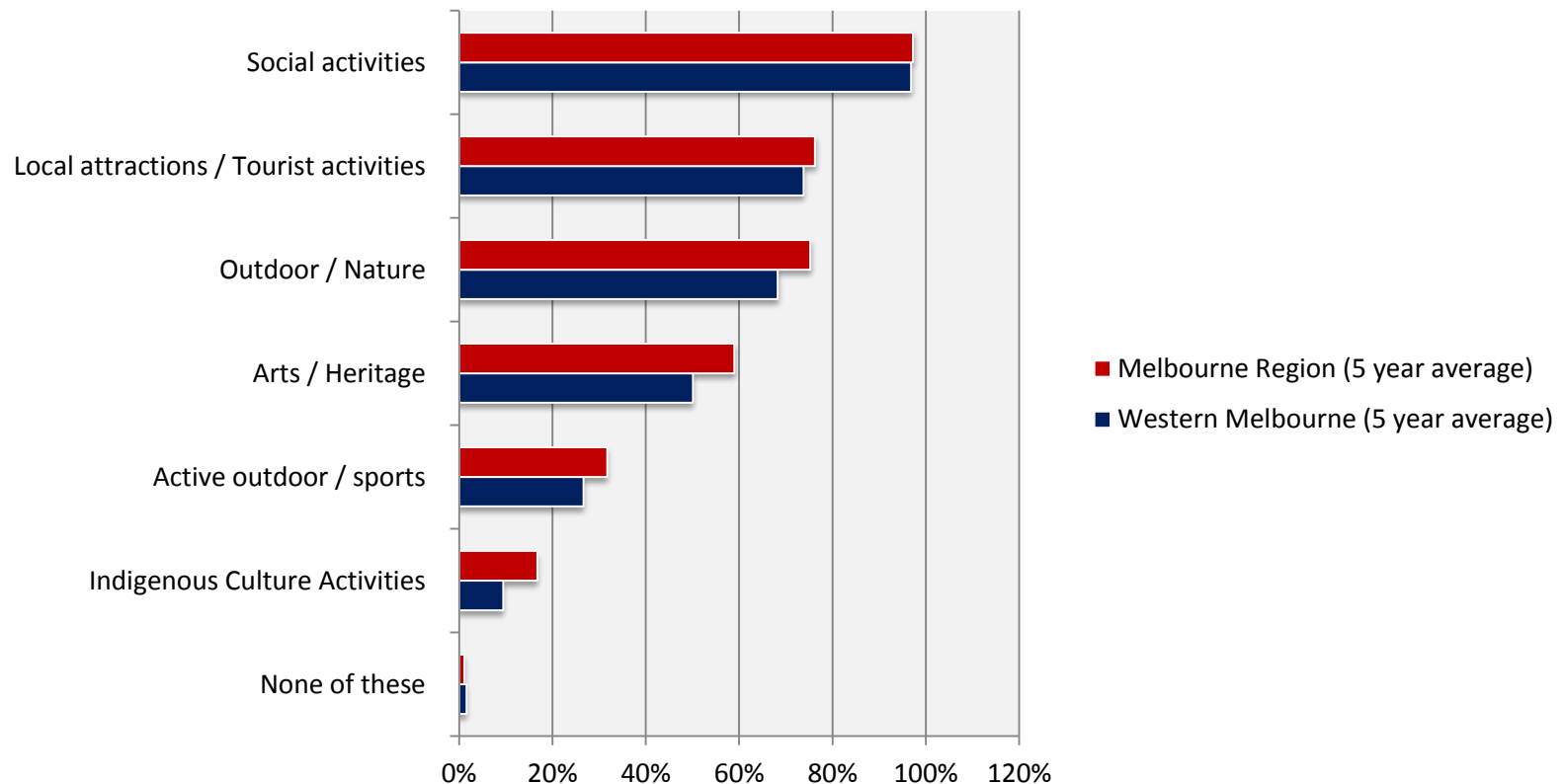
Country	Western Melbourne (5 year average)	Melbourne Region (5 year average)
New Zealand	25%	14%
United Kingdom	11%	11%
India	9%	4%
Other Asia	8%	3%
Other Countries	7%	5%
China	6%	15%
Malaysia	6%	5%
United States of America	6%	8%
Other Europe	4%	4%
Singapore	3%	5%
Indonesia	2%	2%
Germany	2%	4%
Canada	2%	2%
Thailand	1%	1%
Hong Kong	1%	3%
France	1%	2%
Japan	1%	2%
Netherlands	1%	1%
Korea	1%	2%
Scandinavia	1%	2%
Italy	1%	2%
Switzerland	1%	1%
Taiwan	1%	2%
Total	100%	100%

Source: Tourism Research Australia, International Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

- International visitors to Western Melbourne undertake a comparable activity profile to visitors to the Melbourne region.

Figure 22: International Visitors – Leisure Activities

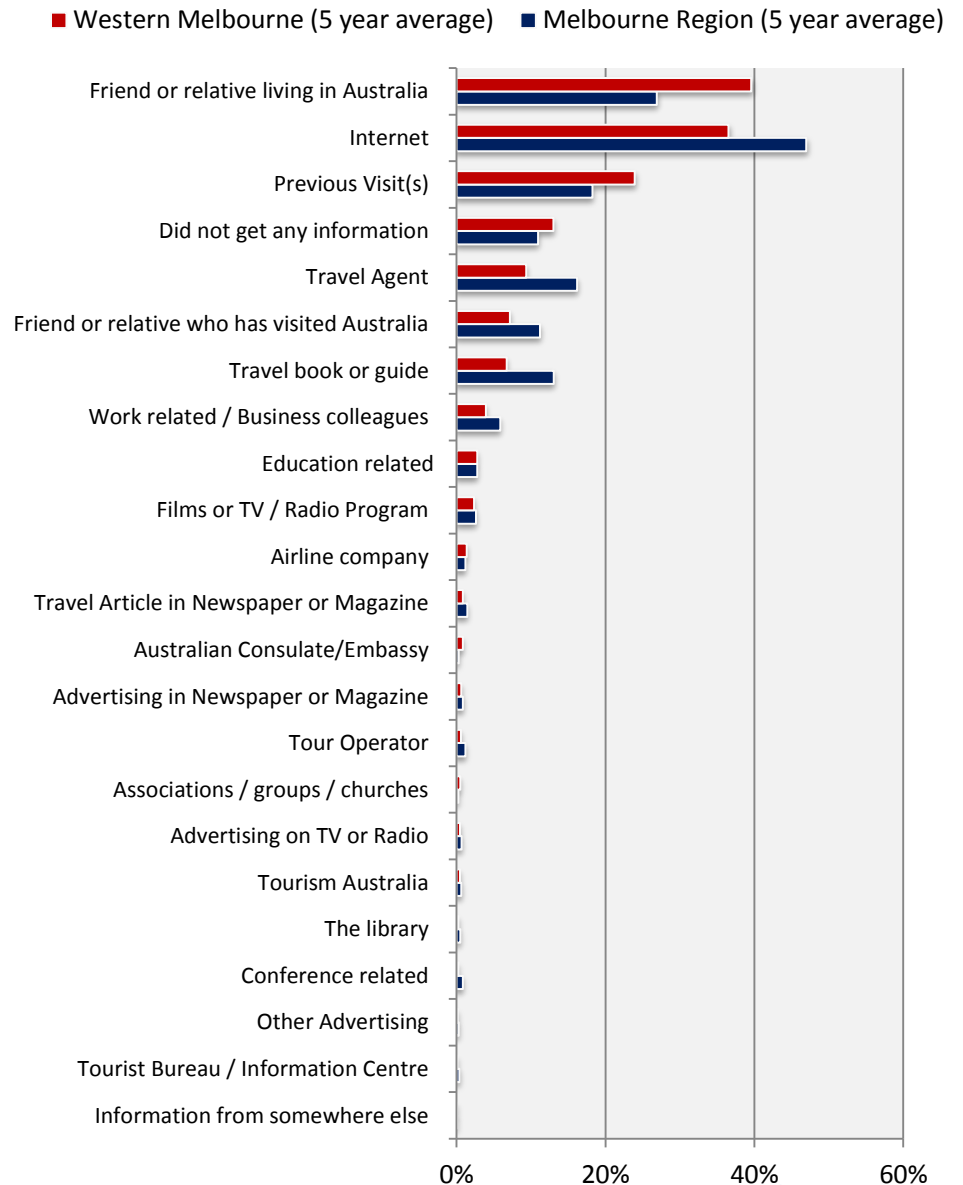


Source: Tourism Research Australia, International Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – INTERNATIONAL VISITORS

Figure 23: International Visitors – Information Source Prior to Visit

- International visitors to Western Melbourne use friends or relatives living in Australia as their key information source, followed by the internet.

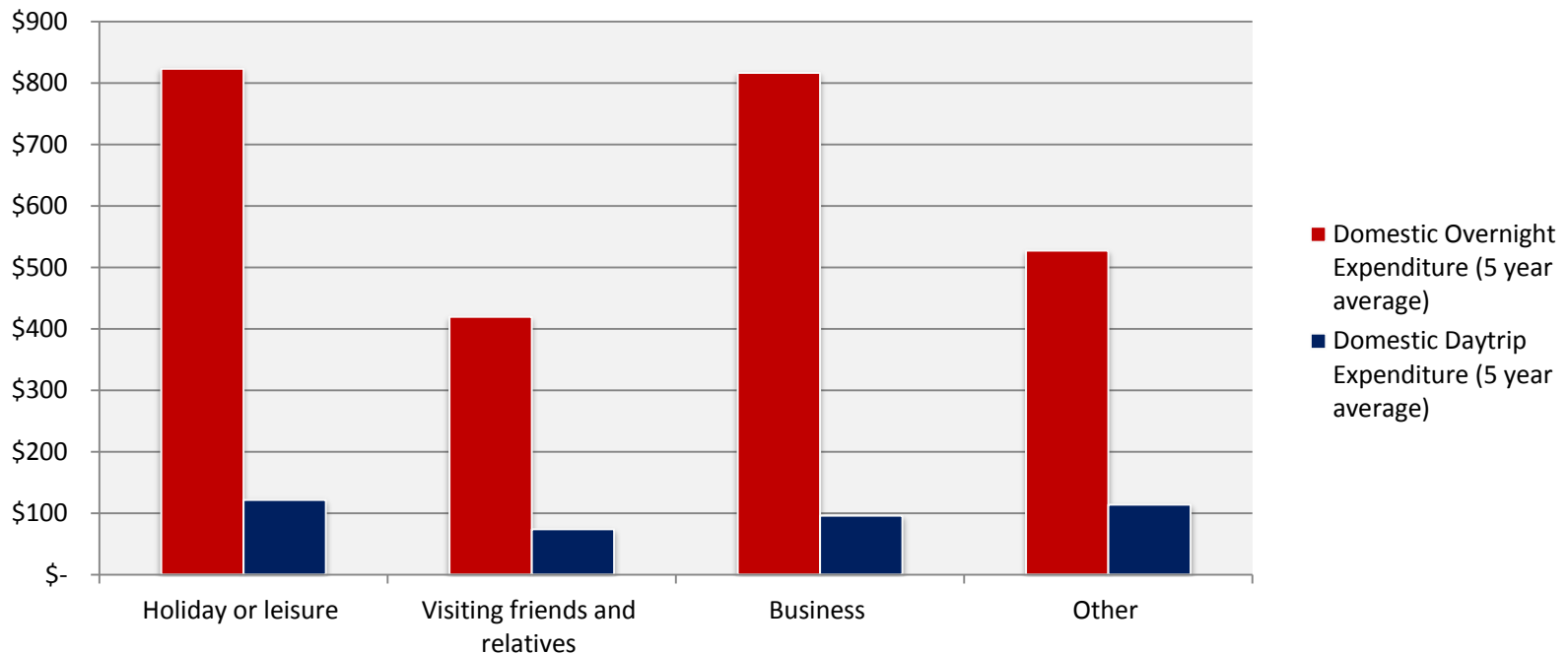


Source: Tourism Research Australia, International Visitors Survey, 2014. 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – AVERAGE EXPENDITURE – DOMESTIC VISITORS

- Domestic overnight Holiday/Leisure and Business visitors to Australia spend more on average when compared to overnight visitors visiting friends and relatives.
- Domestic daytrip expenditure is similar across all purposes of visit.

Figure 24: Domestic Overnight & Daytrip Expenditure – Average Australia by purpose of visit

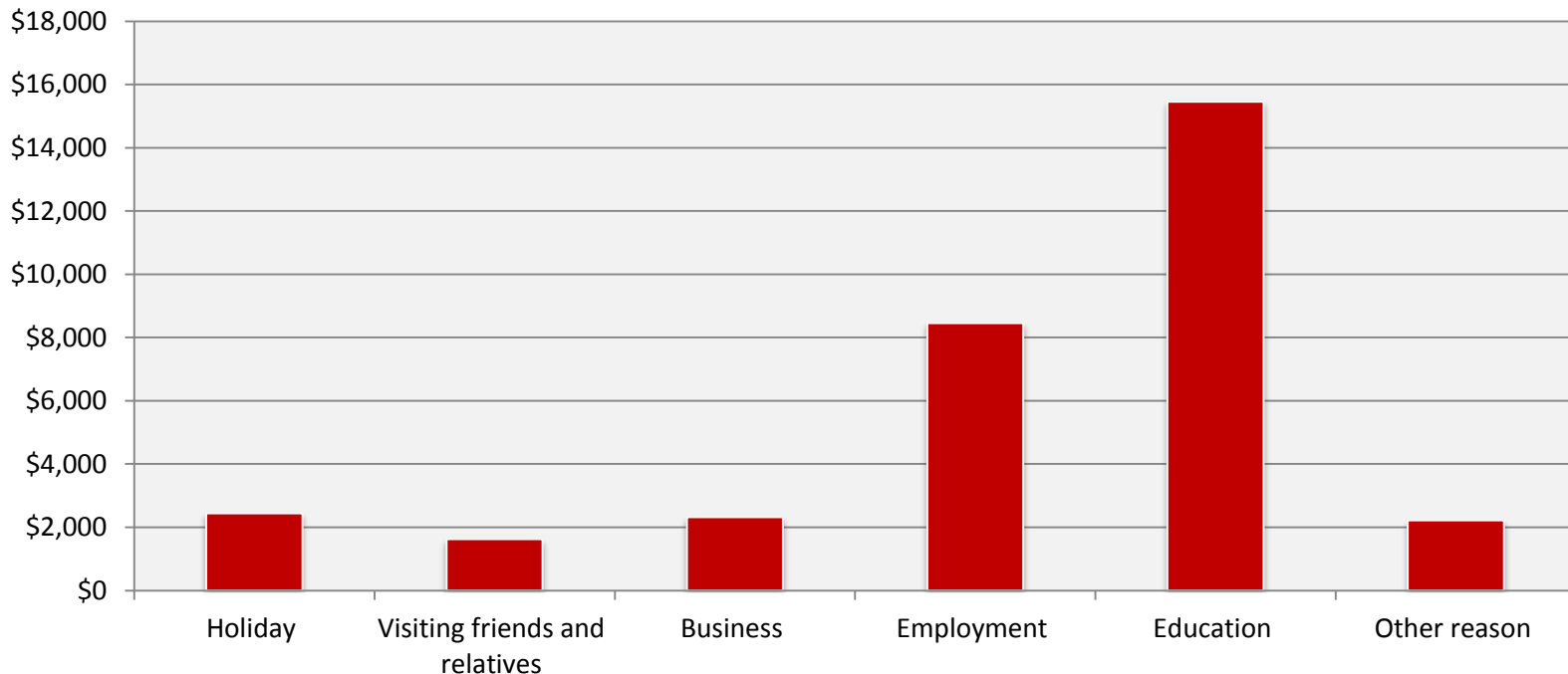


Source: Tourism Research Australia, International Visitors Survey, 2014 (expenditure excluding motor vehicles). 5 year average to March 2014
Data compiled by Urban Enterprise 2014

TOURISM IN MELBOURNE'S WEST – AVERAGE EXPENDITURE – DOMESTIC VISITORS

- International visitors visiting for education have the highest average expenditure, followed by those visiting for employment.

Figure 25: International Expenditure – Average Australia by purpose of visit



Source: Tourism Research Australia, International Visitors Survey, 2014 (expenditure excluding motor vehicles). 5 year average to March 2014
Data compiled by Urban Enterprise 2014