

Western Melbourne Visitor Profile

2022 Calendar Year

June 2023

melbourne's  west

 **urban** planning
economics+tourism
enterprise

Urban Enterprise is located on Wurundjeri Woi-Wurrung Country. We pay our respects to elders past, present and emerging and also acknowledge all Traditional Owners of Country on which we work.

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Domestic Overnight

Visits



730,000 visits (17%)

Nights



2.1 Million nights

ALOS



2.9 nights

Purpose of Visit



VFR (65%)
Business (16%)
Holiday (13%)

Top Activities



1. Seeing friends and relatives
2. Eating and dining out
3. Going to bars and clubs.
4. Shopping.
5. Sightseeing.

Travel Party



- Travelling alone (47%)
- Adult couple (23%)
- Family Group (13%)

Accom.



- Friends or relatives' property (69%)
- Standard hotel/motor inn (12%)
- Luxury hotel or resort (5%)

Domestic Daytrip

3.4 million visits (81%)

VFR (43%)
Holiday (34%)
Business (15%)

1. Seeing friends and relatives
2. Eating and dining out
3. Shopping.
4. Sightseeing.
5. Bushwalking.

NA

NA

International Overnight

80,000 visits (2%)

2.8 million nights

35 nights

VFR (82%)
Holiday (9%)
Business (3%)

1. Eating and dining out
2. Shopping.
3. Markets.
4. Beach.
5. Sightseeing.

- Travelling alone (30%)
- Adult couple (12%)
- Family Group (13%)

- Friends or relatives' property (87%)
- Rented house/apartment/flat (6%)
- Serviced apartment (2%)

Total

4.2 million visits

Total

4.9 million nights

**Western Melbourne
Tourism**

**Regional Visitation
Summary**

2022

melbourne's west

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Introduction

Background

Western Melbourne Tourism engaged Urban Enterprise to prepare a visitor profile for the Western Melbourne region, which includes the local government areas of Wyndham, Moonee Valley, Maribyrnong, Hobsons Bay, Brimbank and Melton.

This report compiles visitation and visitor characteristic data from Tourism Research Australia's (TRA) National Visitor Survey and International Visitor Survey (IVS) (see glossary for further detail).

The visitor profile has been benchmarked with metropolitan Melbourne.

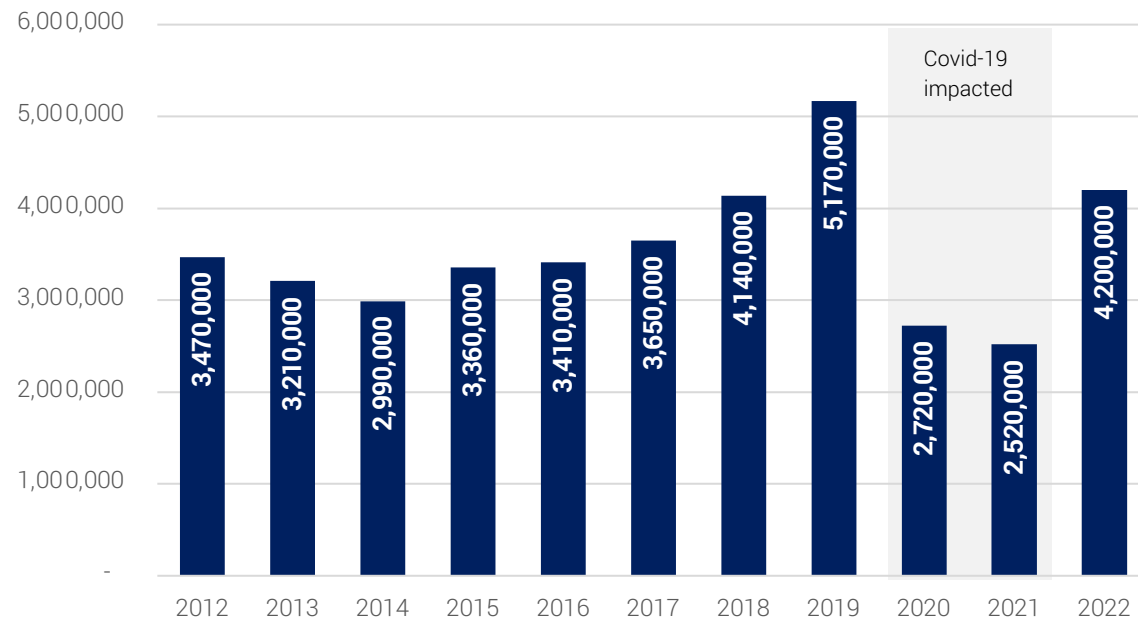


Visitation Summary

In 2022 over 4 million people visited Melbourne's West.

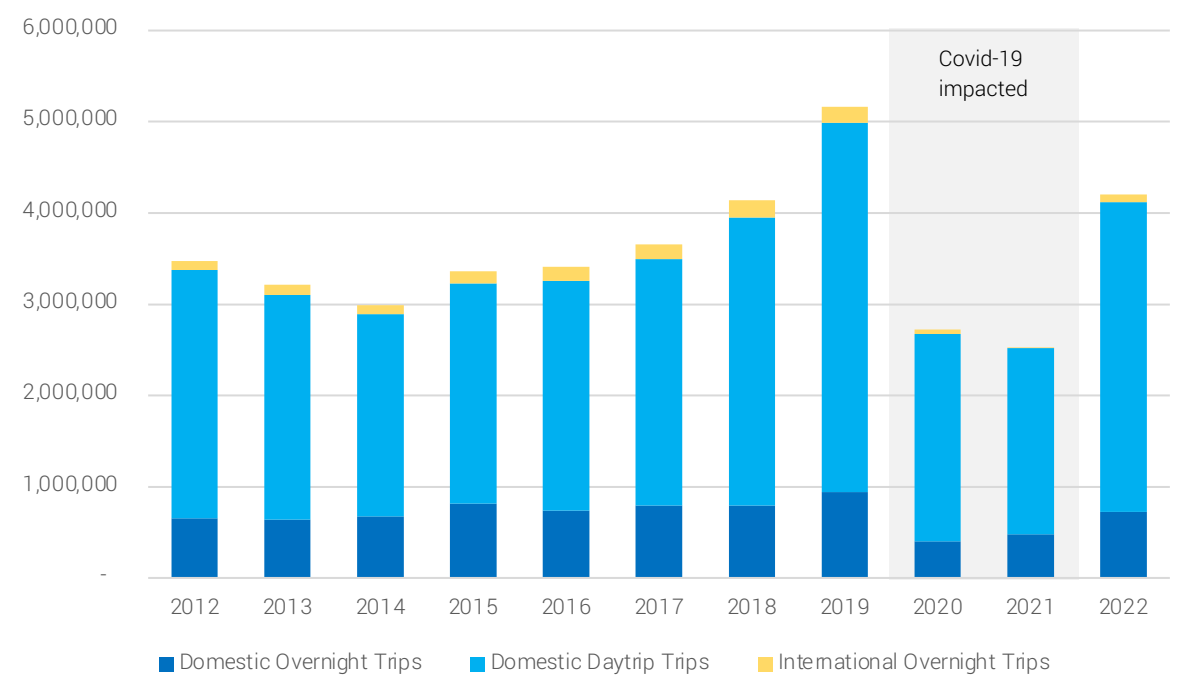
Domestic daytrips accounted for 80% of visitation in 2022, followed by domestic overnight (17%) and international overnight (2%).

F1. TOTAL VISITATION TO WESTERN MELBOURNE, 2012 - 2022



Source: Visitation, NVS, IVS, Tourism Research Australia, 2012-22. Figures have been rounded.

F2. VISITATION BY SUB-MARKET, 2012-2022



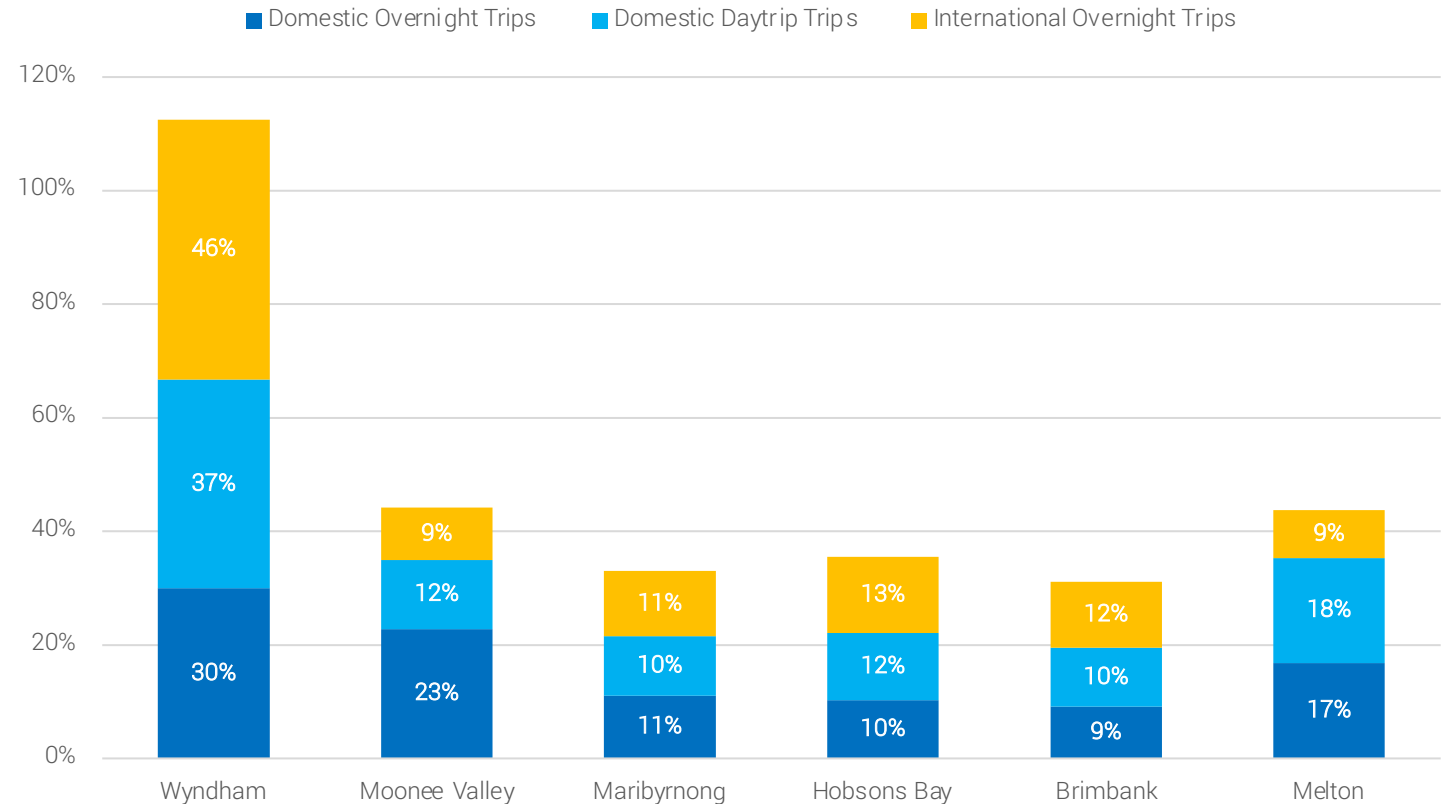
Source: Visitation, NVS, IVS, Tourism Research Australia, 2012-22. Figures have been rounded.

Of the LGAs that make up Melbourne's West, Wyndham contributed the highest percentage of visitation across all three visitor categories.

In 2022, approximately 36% (1.5M) of all visitors to Western Melbourne went to Wyndham, making it the most significant LGA visitor economy in Melbourne's West.

Moonee Valley had the second largest visitor economy of the LGAs in Western Melbourne, attracting 585,000 people in 2022 which equates to 14% of Western Melbourne's total visitors.

F3. PROPORTIONATE WESTERN MELBOURNE SUB REGIONS VISITATION, 2022



Source: Visitation, NVS, IVS, Tourism Research Australia, 2022.

Domestic Overnight Visitor Profile

The following presents a visitor profile of domestic overnight visitors to Western Melbourne based on NVS results for the 2022 calendar year.

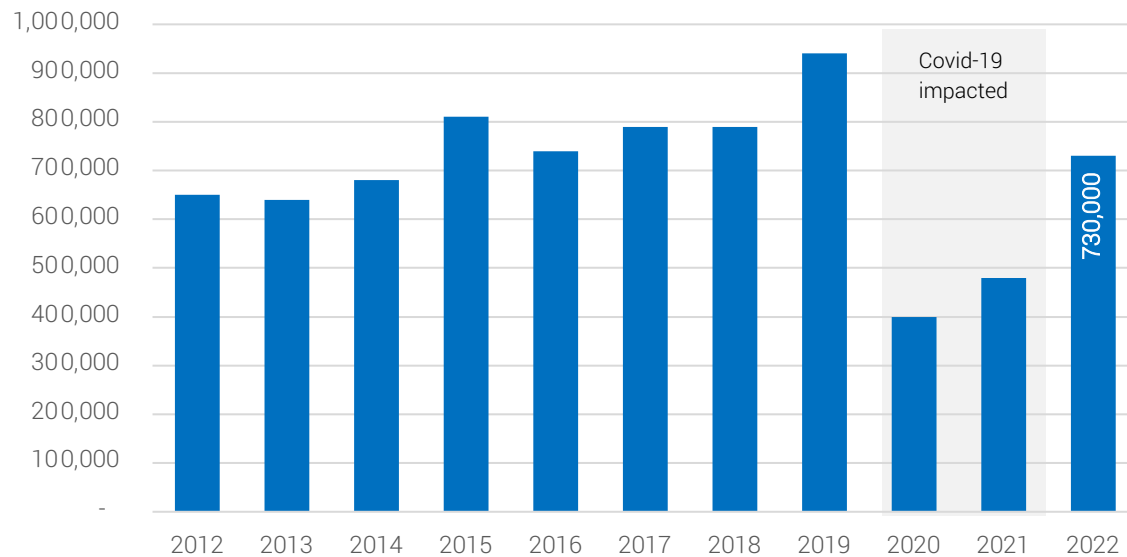
The visitor profile includes:

- Reason for trip
- Visitor age
- Visitor gender
- Travel party
- Accommodation
- Activities undertaken
- Visitor Origin
- Length of stay

Between 2012 and 2019 domestic overnight visitation to Western Melbourne was growing at an average rate of 5.4% per year.

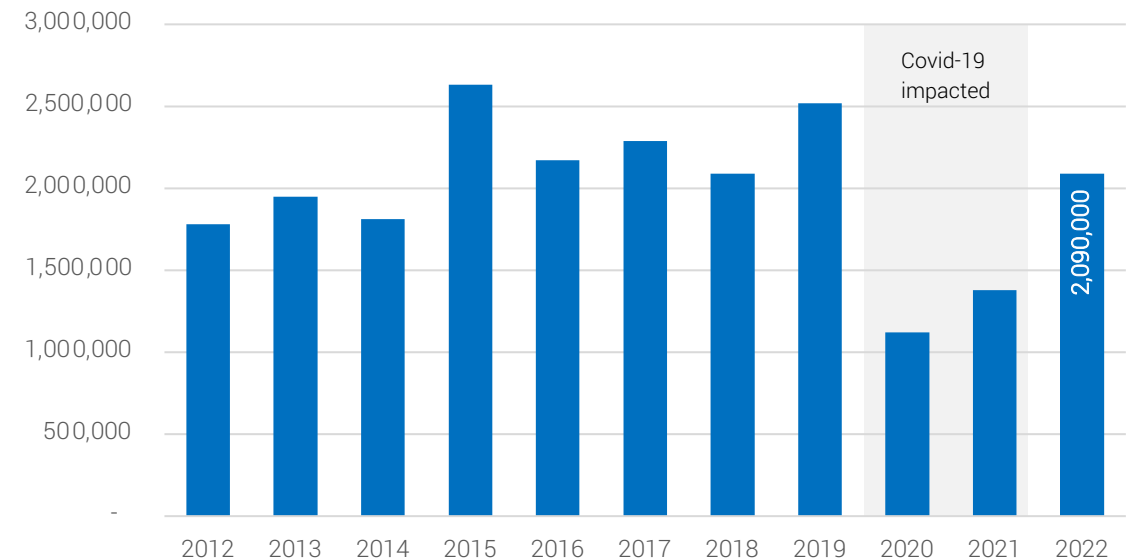
2019 recorded the highest domestic overnight visitation numbers in the last 10 years. However, due to the impacts of the COVID-19 pandemic there was a dramatic decline in visitor numbers in 2020 and 2021. While 2022 did not achieve the same levels of visitation to 2019, domestic overnight visitation recovered to 2018 levels.

F4. DOMESTIC OVERNIGHT VISITORS, WESTERN MELBOURNE, 2012-2022



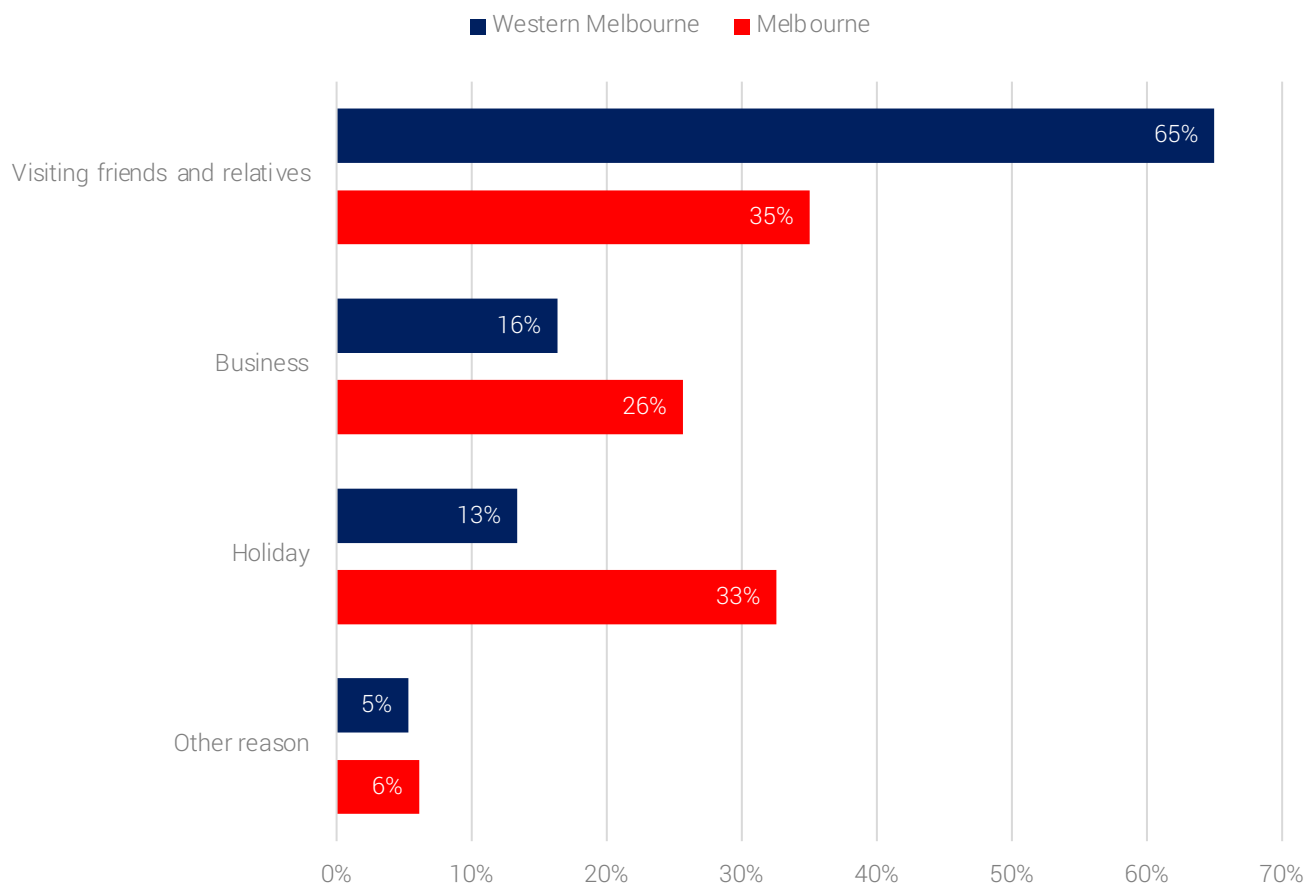
Source: Visitation, NVS, Tourism Research Australia, 2012-22. Figures have been rounded.

F5. DOMESTIC OVERNIGHT VISITOR NIGHTS, WESTERN MELBOURNE, 2012-2022



Source: Visitation, NVS, Tourism Research Australia, 2012-22. Figures have been rounded.

F6. DOMESTIC OVERNIGHT VISITORS, REASON FOR VISIT, 2022



The main reason for visiting Western Melbourne for 65% of overnight visitors was to visit friends and relatives (VFR).

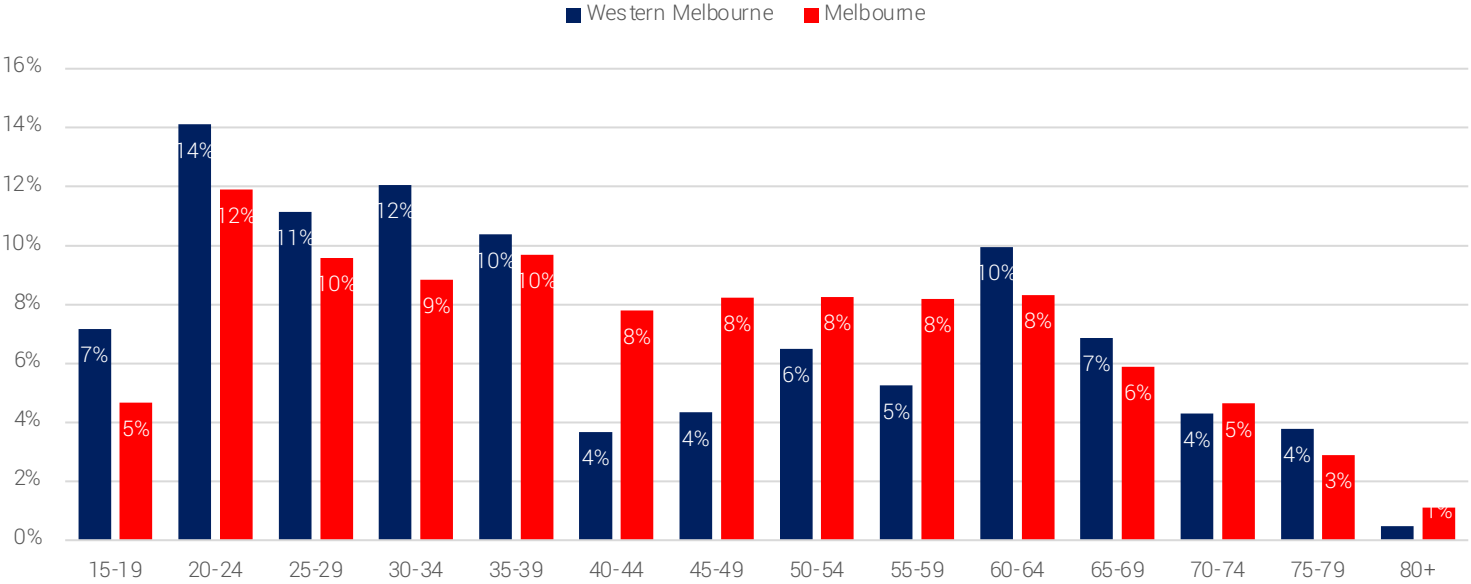
Business is the second most common reason, accounting for 16% of overnight visitors. Holiday (13%) is another common reason people visit Western Melbourne. Compared to Metropolitan Melbourne, Western Melbourne drew in more VFR visitors, but less business and holiday visitors.

Source: Visitation, NVS, Tourism Research Australia, 2022.

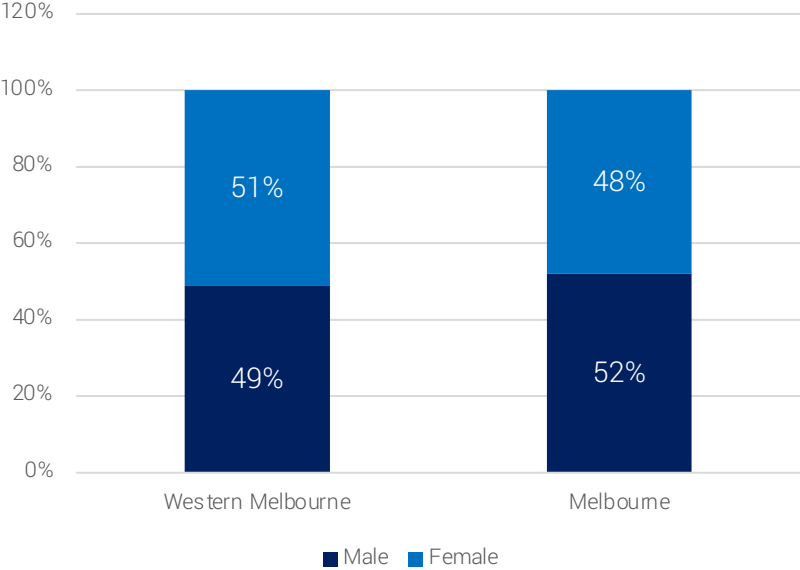
37% of overnight visitors to Western Melbourne are aged between 20-30 years. This represents a younger visitor profile in comparison to Metropolitan Melbourne.

Overall, the gender split of domestic overnight visitors to Western Melbourne was even, with 51% female and 49% male.

F7. DOMESTIC OVERNIGHT VISITORS, AGE PROFILE, 2022



F8. DOMESTIC OVERNIGHT VISITORS, GENDER OF VISITORS, 2022



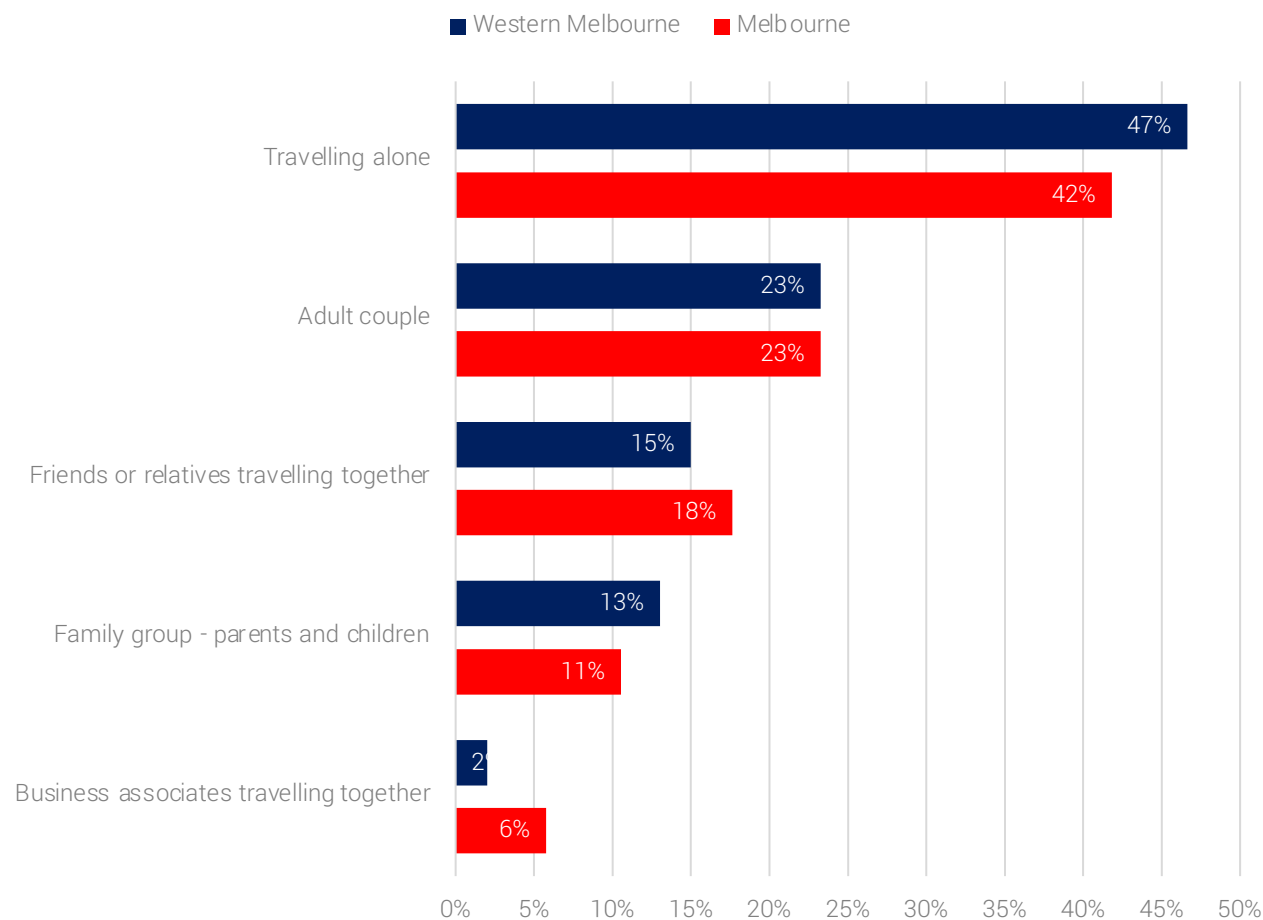
Source: Visitation, NVS, Tourism Research Australia, 2022.

Source: Visitation, NVS, Tourism Research Australia, 2022.

A large number of domestic overnight visitors to Western Melbourne were unaccompanied travellers (47%), followed by adult couples (23%) and friends and relatives travelling together (15%).

Metropolitan Melbourne recorded similar results across all travel party categories except business associates travelling together, Melbourne reported a larger proportion (+4%).

F9. DOMESTIC OVERNIGHT VISITORS, TRAVEL PARTY, 2022

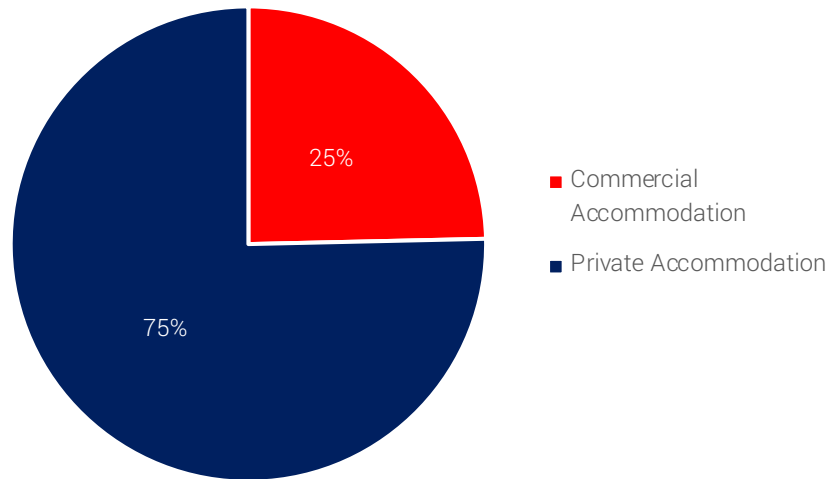


Source: Visitation, NVS, Tourism Research Australia, 2022.

Nearly 70% of overnight visitors to Western Melbourne stayed at a friends or relatives' property.

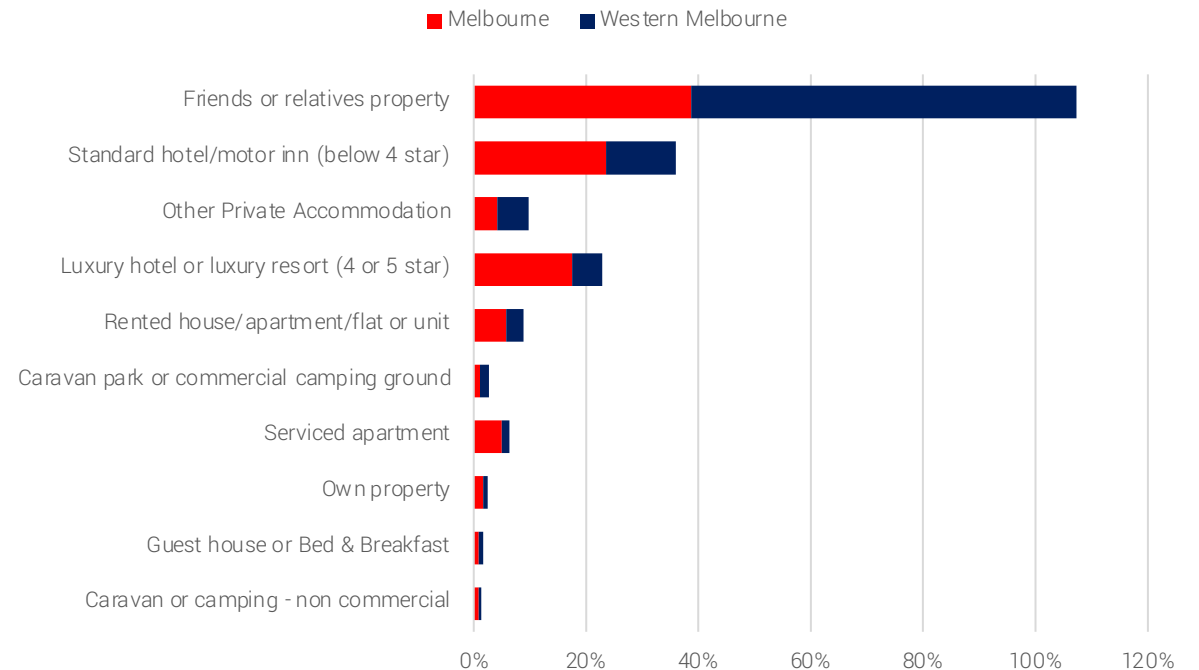
Overall, 75% of Western Melbourne's overnight visitors stayed in private accommodation. A standard hotel/motel was the most popular choice of commercial accommodation (12%). The use of commercial accommodation is significantly higher in Metropolitan Melbourne. 54% of Melbourne's overnight visitors stayed in some form of commercial accommodation.

F10. DOMESTIC OVERNIGHT VISITORS, COMMERCIAL & PRIVATE ACCOMMODATION, 2022



Source: Visitation, NVS, Tourism Research Australia, 2022.

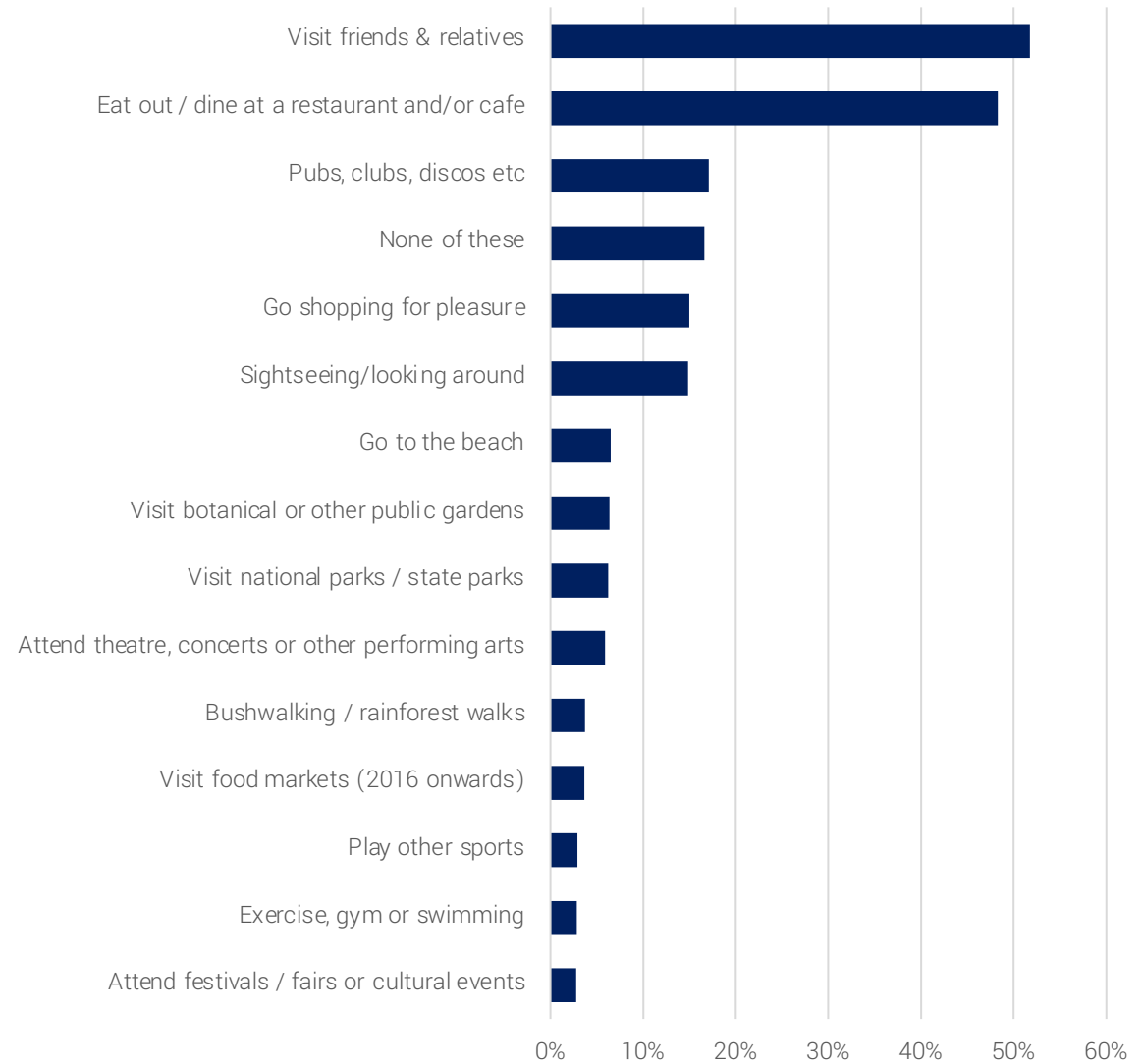
F11. DOMESTIC OVERNIGHT VISITORS, ACCOMMODATION, 2022



Source: Visitation, NVS, Tourism Research Australia, 2022.

F12. DOMESTIC OVERNIGHT VISITORS, TOP 15 ACTIVITIES, 2022

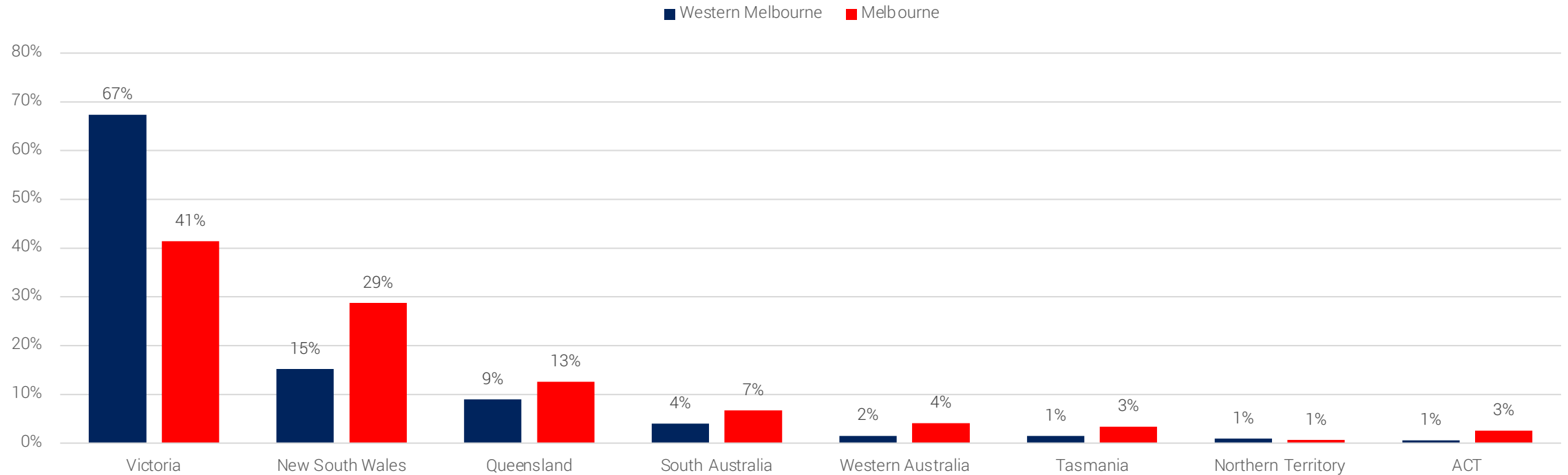
Social activities such as visiting friends and relatives, dining out, going to pubs and bars, shopping for pleasure and sightseeing were the most common activities undertaken in Western Melbourne by domestic overnight visitors.



Source: Visitation, NVS, Tourism Research Australia, 2022.

Most domestic overnight visitors to Western Melbourne are from intrastate (67%). 86% of all interstate visitors came from either New South Wales, Queensland or South Australia.

F13. DOMESTIC OVERNIGHT VISITORS, HOME STATE, 2022

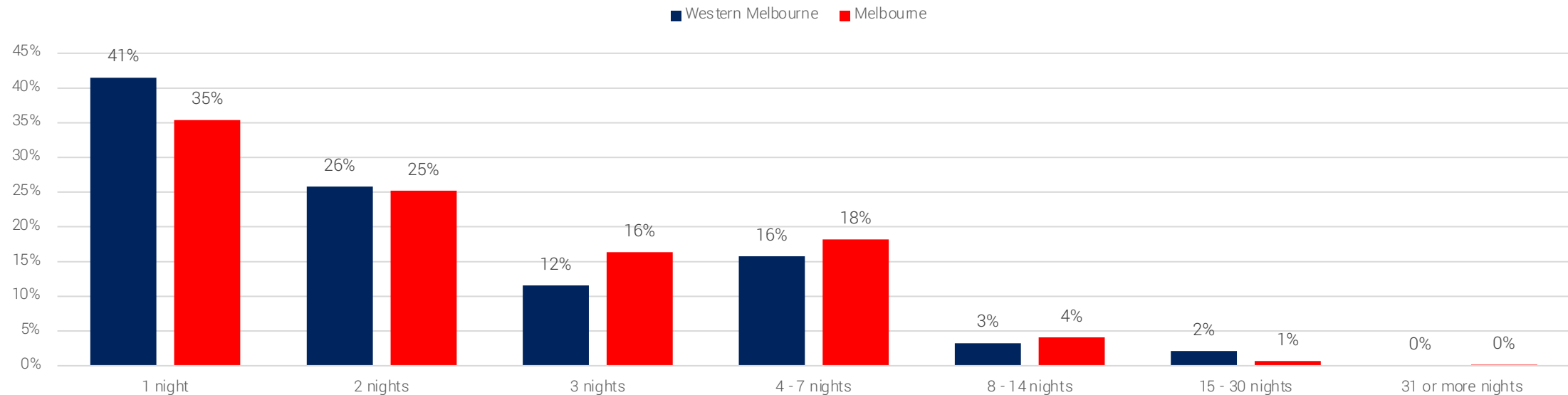


Source: Visitation, NVS, Tourism Research Australia, 2022.

The average length of stay for overnight visitors to Western Melbourne was 2.88 days. This is a slightly lower average than Metropolitan Melbourne in which the result was 2.95 days.

41% of the overnight visitor market stay in western Melbourne for just one night. Visitors rarely stayed for more than a week. Only 5% of overnight visitors stayed for 8 nights or more. The results for Metropolitan Melbourne were roughly the same.

F14. DOMESTIC OVERNIGHT VISITORS, LENGTH OF STAY, 2022



Source: Visitation, NVS, Tourism Research Australia, 2022.

Domestic Daytrip Visitor Profile

The following presents a visitor profile of domestic daytrip visitors to Western Melbourne based on NVS results for the 2022 calendar year.

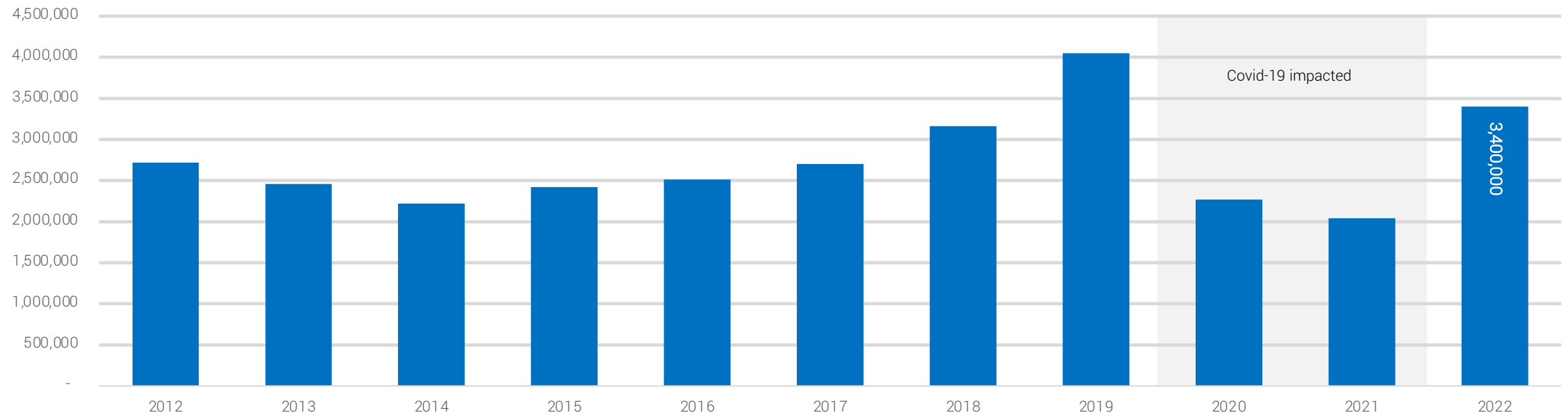
The visitor profile includes:

- Reason for trip
- Visitor age
- Visitor gender
- Activities undertaken

Between 2012 and 2019 domestic daytrip visitation to Western Melbourne was growing at an average rate of 5.8% per year. The rate of growth increased to 22.4% in the two years prior to the pandemic.

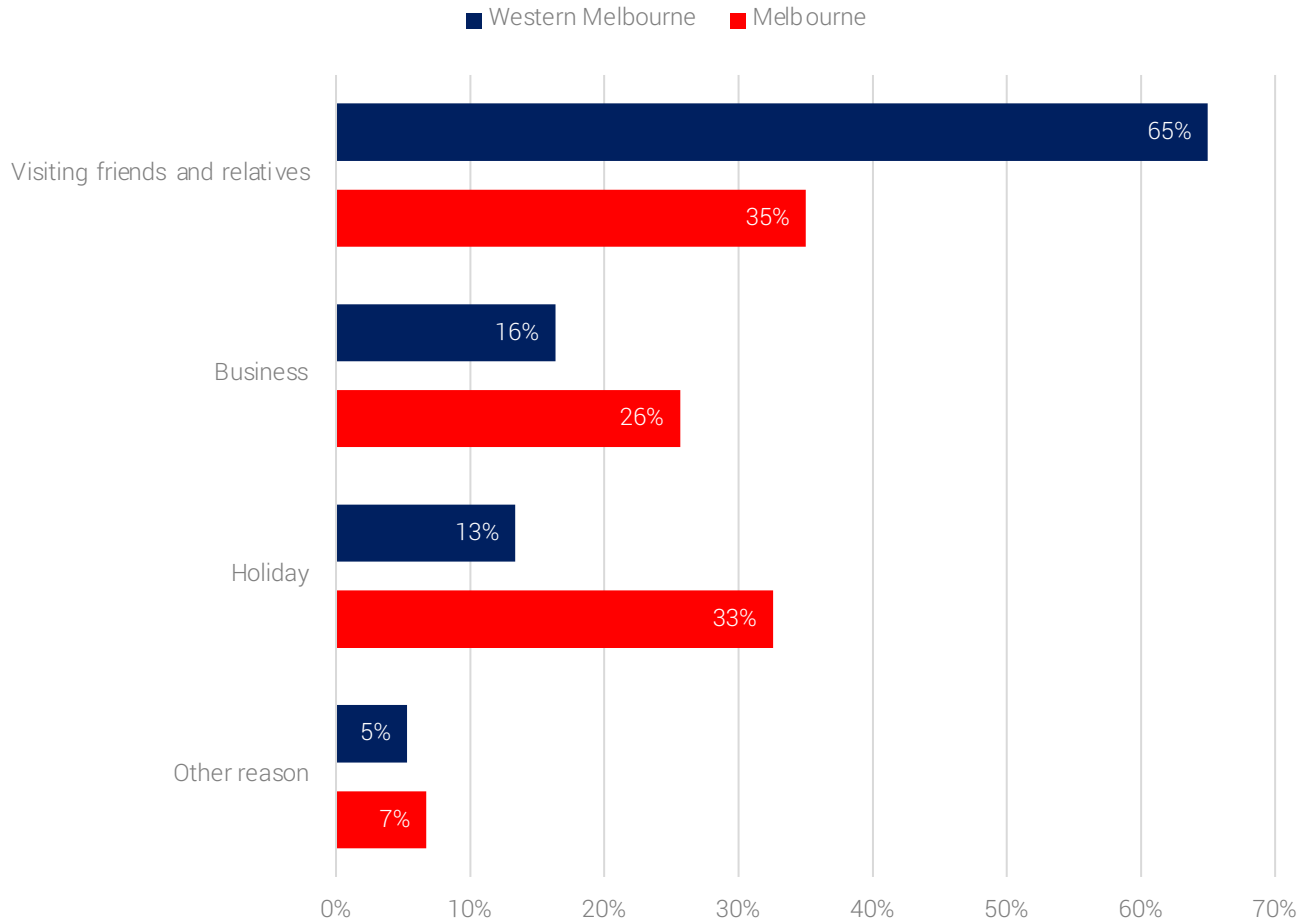
2019 recorded the highest domestic daytrip visitation numbers over the last 10 years. Due to the impacts of the COVID-19 pandemic there was a decline in visitor numbers in 2020 and 2021. While 2022 did not achieve the same level of pre-covid visitation, visitation exceeded 2018 numbers.

F15. DOMESTIC DAYTRIP VISITORS, WESTERN MELBOURNE, 2012-2022



Source: Visitation, NVS, Tourism Research Australia, 2012-22.

F16. DOMESTIC DAYTRIP VISITORS, REASON FOR VISIT, 2022



Daytrip visitors to Western Melbourne primarily visited to see friends and relatives (65%).

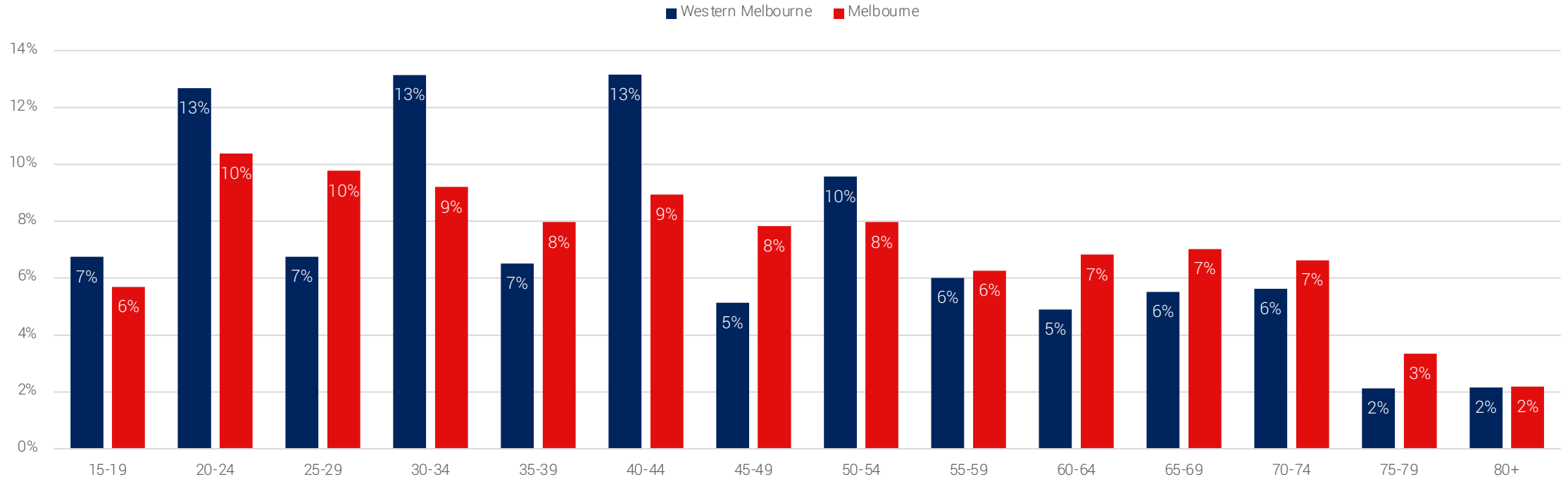
Business (16%) and Holiday (13%) were other common reasons for visiting.

Compared to Metropolitan Melbourne, Western Melbourne had a larger proportion of VFR visitors and less business and holiday visitors.

Source: Visitation, NVS, Tourism Research Australia, 2022.

52% of daytrip visitors to Western Melbourne are aged between 20-40 years, which is a younger visitor profile in comparison to Metropolitan Melbourne.

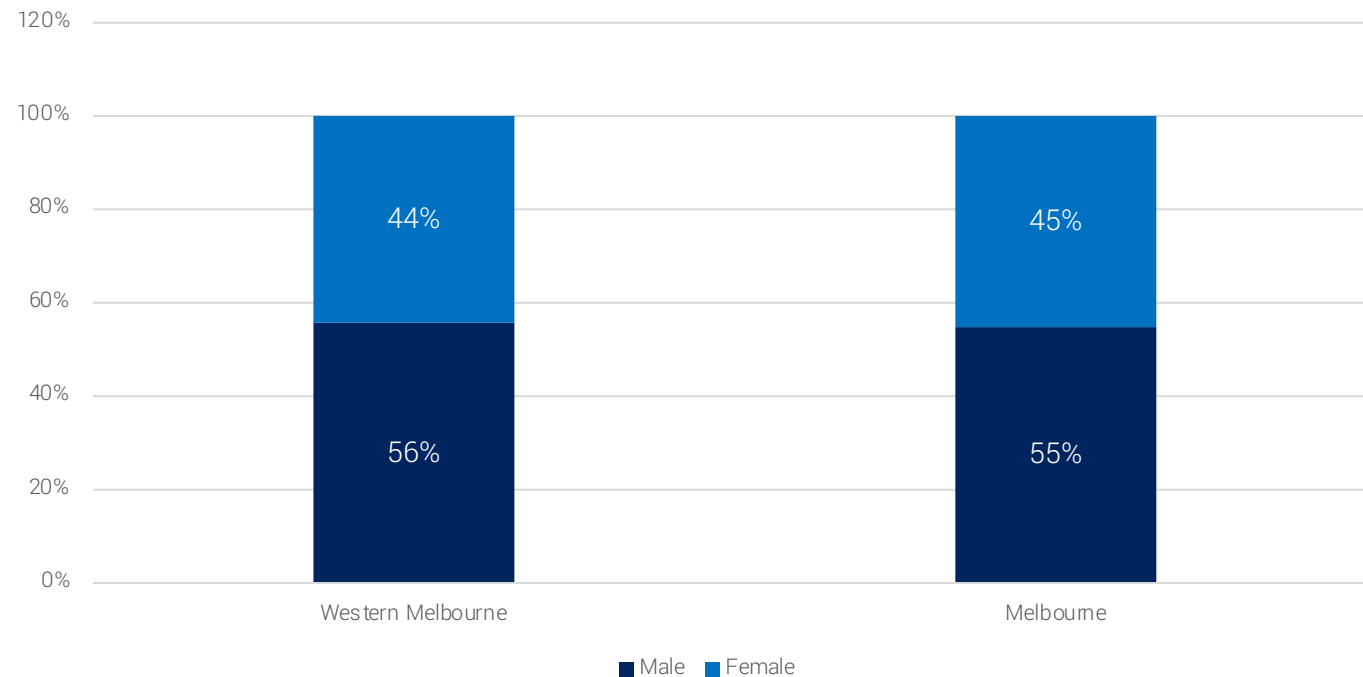
F17. DOMESTIC DAYTRIP VISITORS, AGE PROFILE, 2022



Source: Visitation, NVS, Tourism Research Australia, 2022.

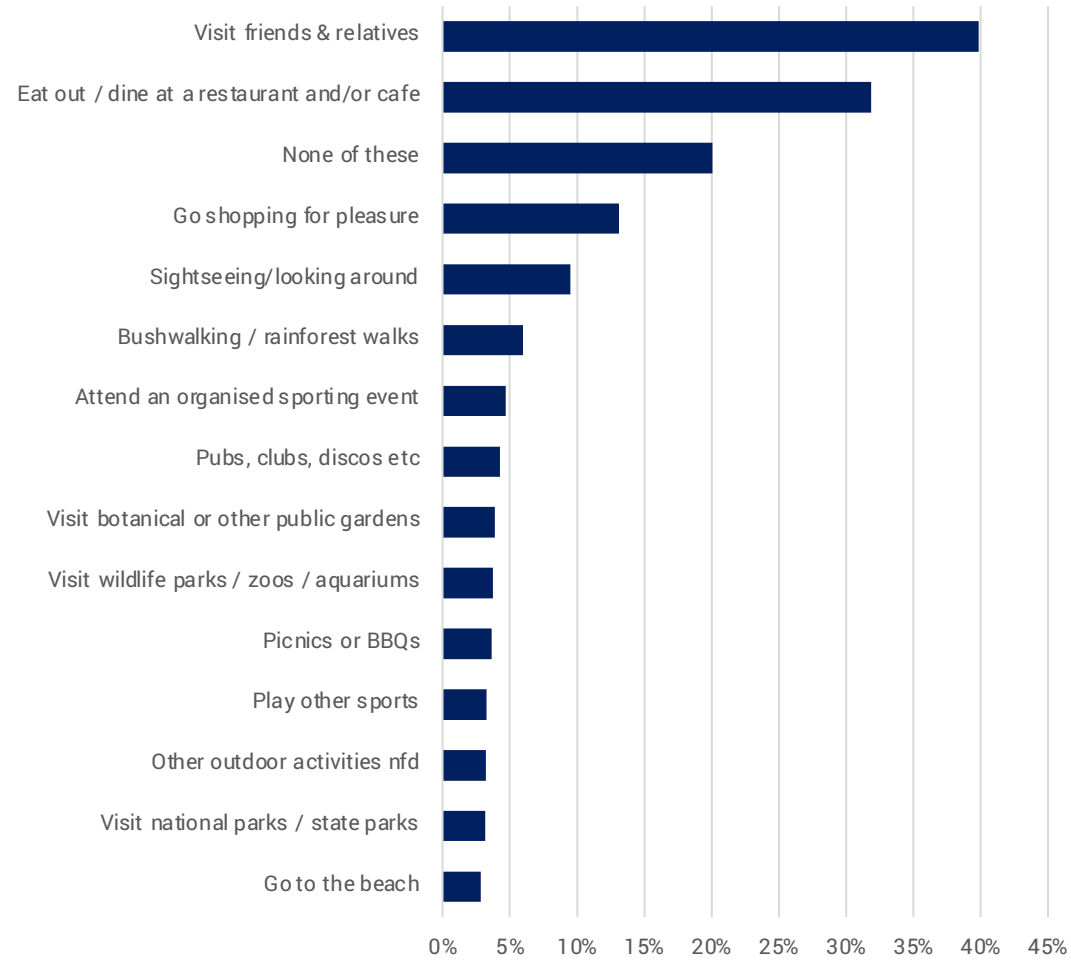
There is a 12% difference in the gender split of daytrip visitor, more males (56%) visit Western Melbourne than females (44%). Metropolitan Melbourne highlights a similar gender split.

F18. DOMESTIC DAYTRIP VISITORS, GENDER OF VISITORS, 2022



Source: Visitation, NVS, Tourism Research Australia, 2022.

F19. DOMESTIC DAYTRIP VISITORS, TOP 15 ACTIVITIES, 2022



Social activities such as visiting friends and relatives, dining out, going shopping for pleasure and sightseeing were the most common activities undertaken in Western Melbourne by domestic daytrip visitors.

Source: Visitation, NVS, Tourism Research Australia, 2022.

International Visitor Profile

The following presents a visitor profile of international overnight visitors to Western Melbourne based on IVS results for the 2022 calendar year.

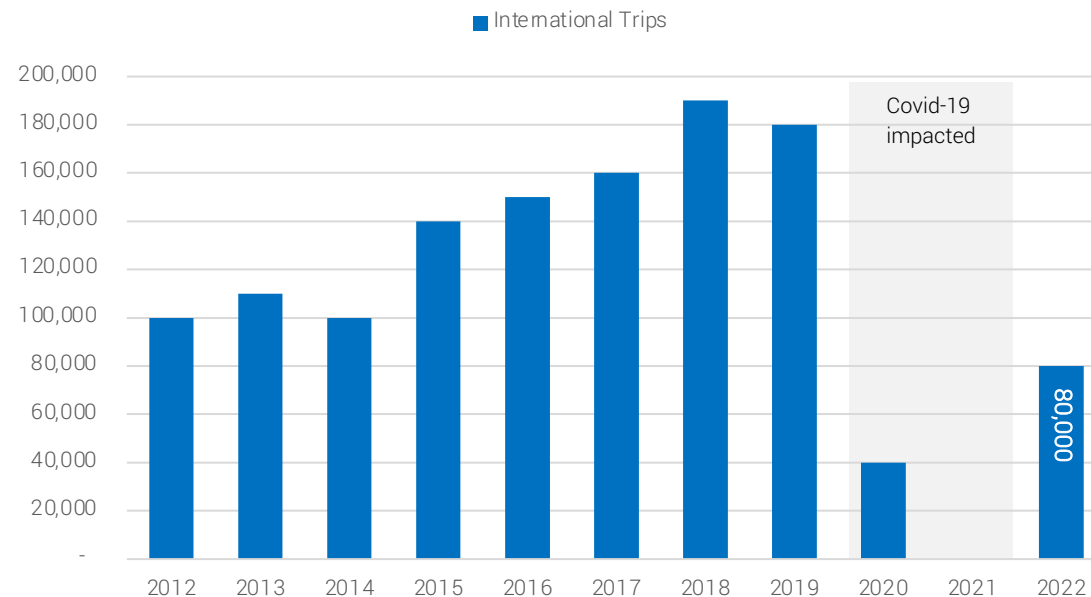
The visitor profile includes:

- Reason for trip
- Visitor age
- Visitor gender
- Travel party
- Accommodation
- Visitor Origin
- Length of stay

Up until 2019 International visitation to Western Melbourne was growing at a rate of 9.2% per annum.

As a result of the COVID-19 pandemic and the accompanying closure of Australia’s international borders there was a significant decline in international visitors to Western Melbourne in 2020 and 2021. While 2022 has recorded growth in comparison to the previous two years, it has only recovered to around 45% of pre-pandemic visitation .

F20. INTERNATIONAL VISITORS, WESTERN MELBOURNE, 2012-2022



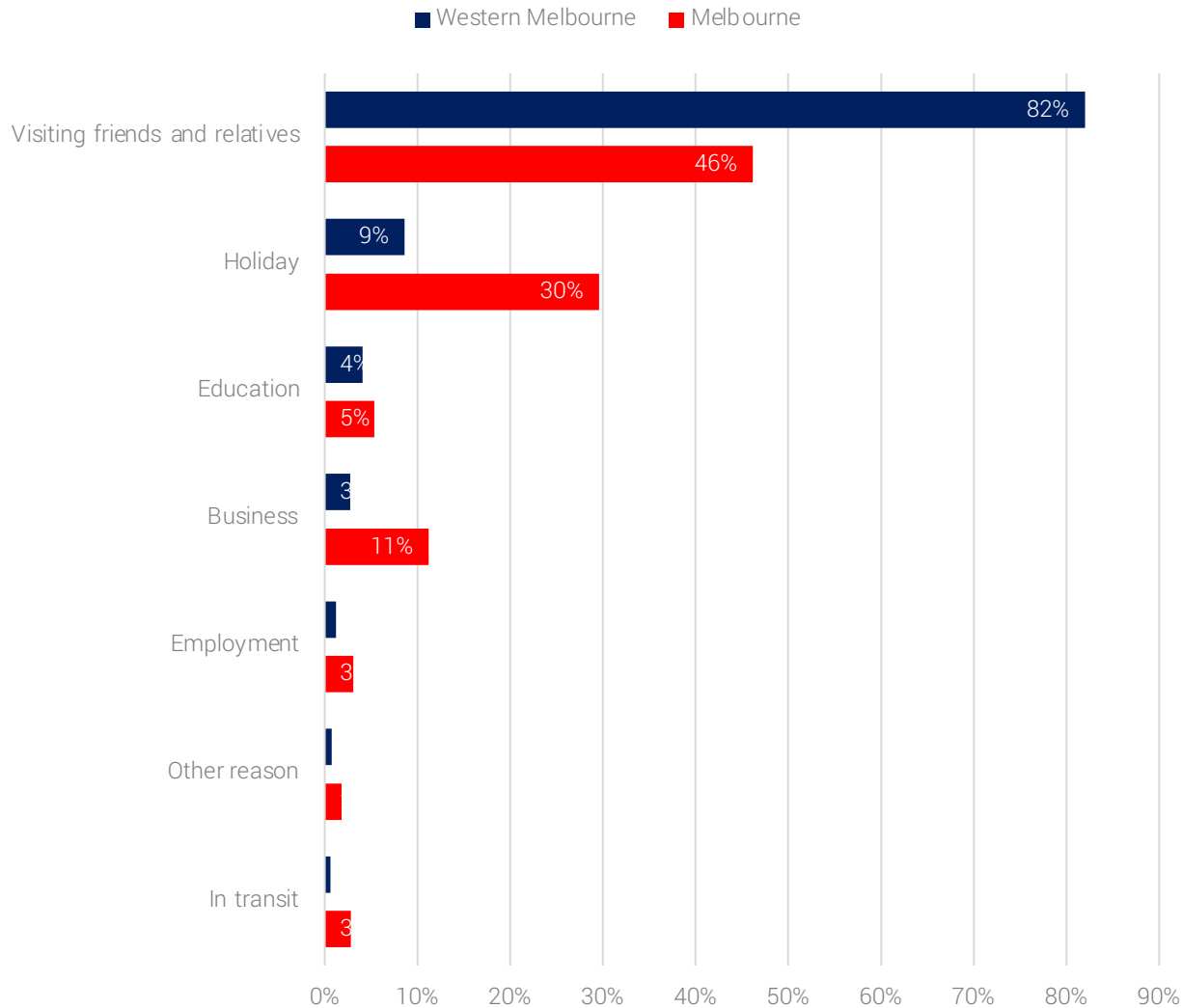
Source: Visitation, IVS, Tourism Research Australia, 2012-22.

F21. DOMESTIC OVERNIGHT VISITOR NIGHTS, WESTERN MELBOURNE, 2012-2022



Source: Visitation, IVS, Tourism Research Australia, 2012-22.

F22. INTERNATIONAL VISITORS, REASON FOR VISIT, 2022



International visitors to Western Melbourne primarily visited to see friends and relatives (82%).

Holiday was the second most common reason for visiting Western Melbourne but only accounted for 9% of international visits. Compared to Metropolitan Melbourne the west had significantly lower rates of holiday (-21%) and business (-8%) visitors.

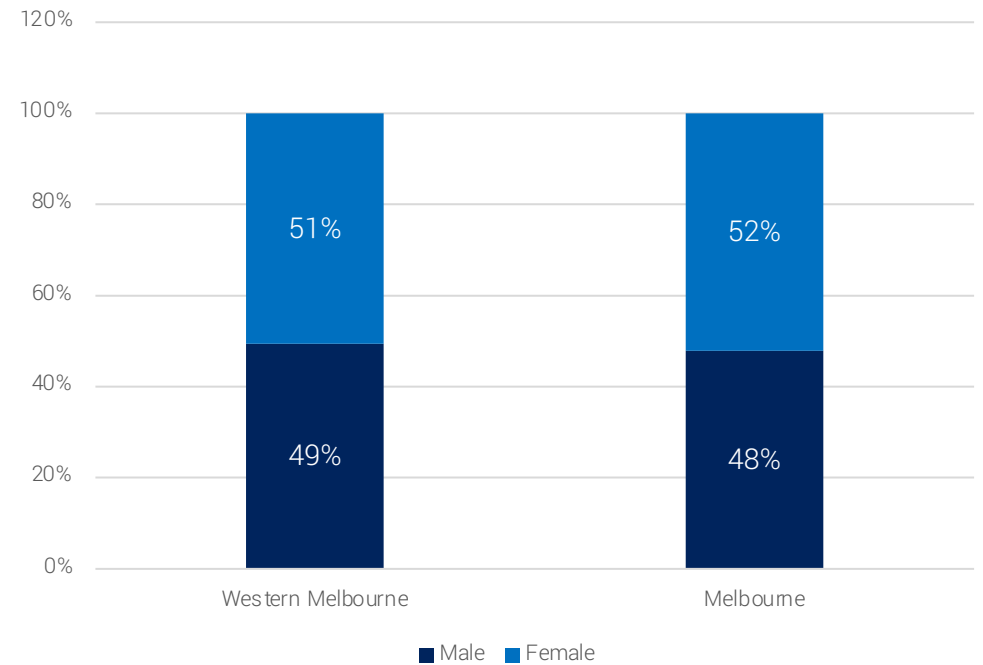
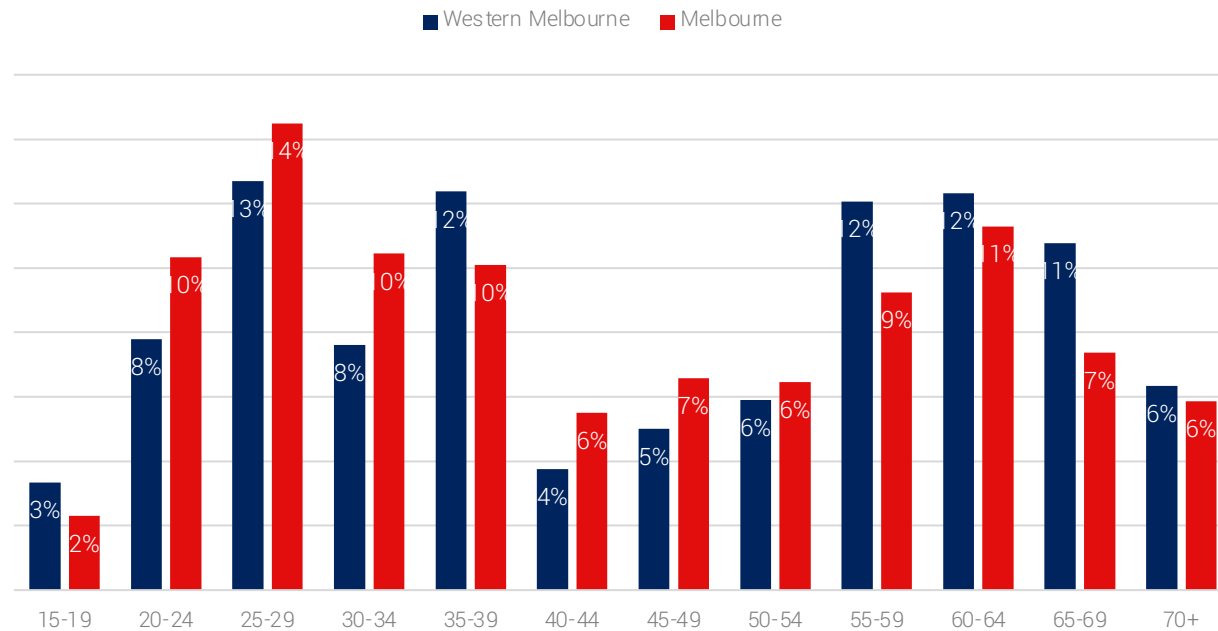
Source: Visitation, IVS, Tourism Research Australia, 2022.

The age profile of International visitors to Western Melbourne is slightly older, when compared to metropolitan Melbourne.

51% of internationals were females and 49% males.

F23. INTERNATIONAL VISITORS, AGE PROFILE, 2022

F24. INTERNATIONAL VISITORS, GENDER OF VISITORS, 2022

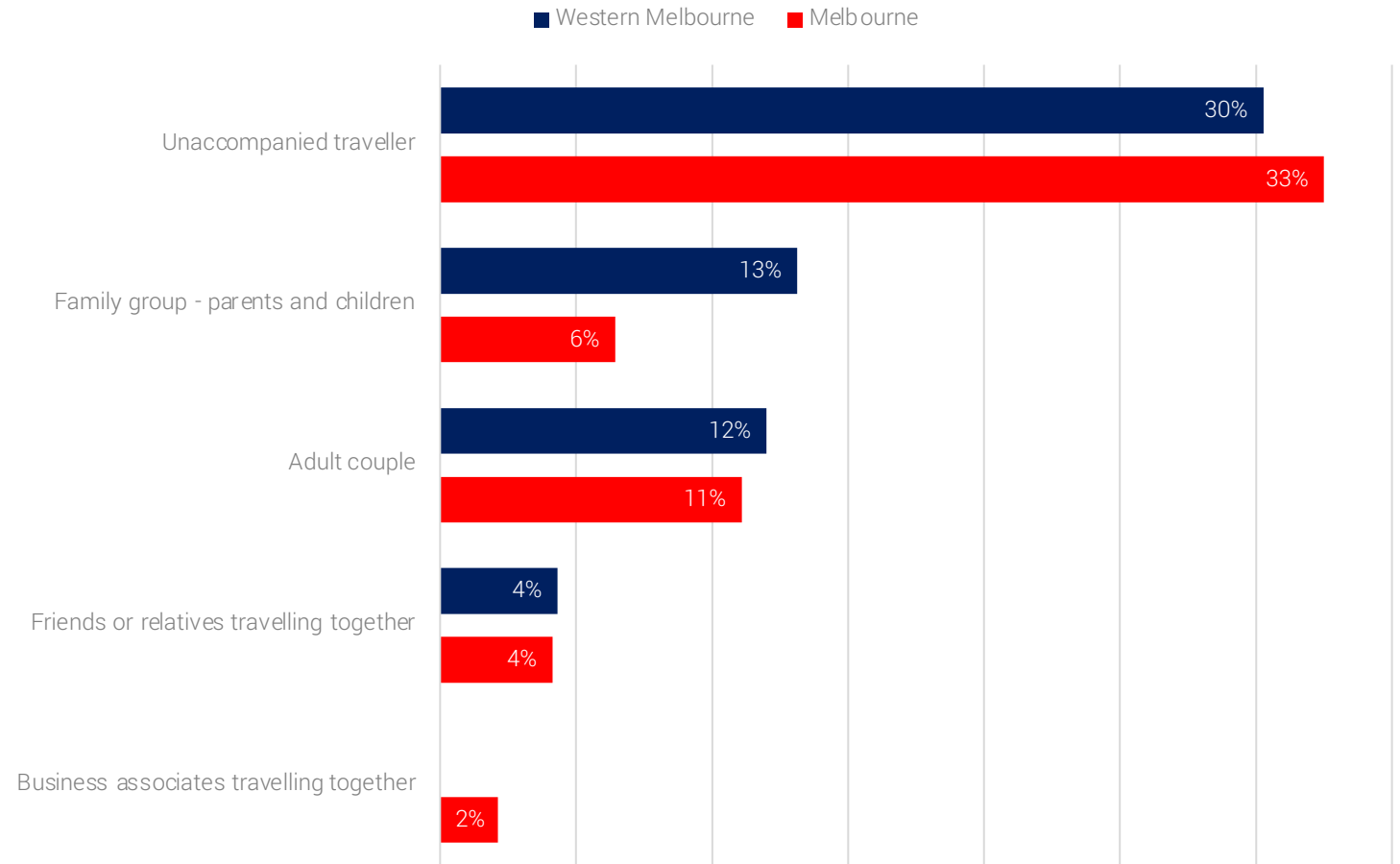


Source: Visitation, IVS, Tourism Research Australia, 2022.

Source: Visitation, IVS, Tourism Research Australia, 2022.

Western Melbourne (30%) and Metropolitan Melbourne (33%) attract a similar proportion of unaccompanied travellers. However, the West draws in more family groups (+7%).

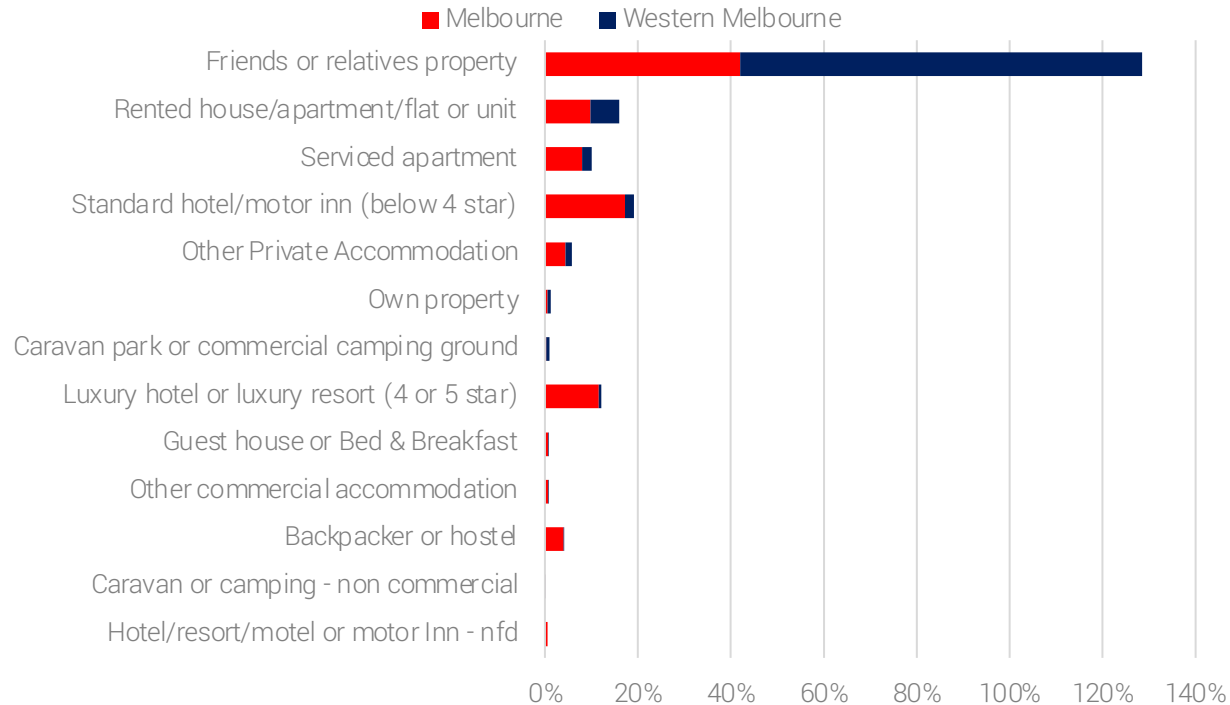
F25. INTERNATIONAL VISITORS, TRAVEL PARTY, 2022



Source: Visitation, IVS, Tourism Research Australia, 2022.

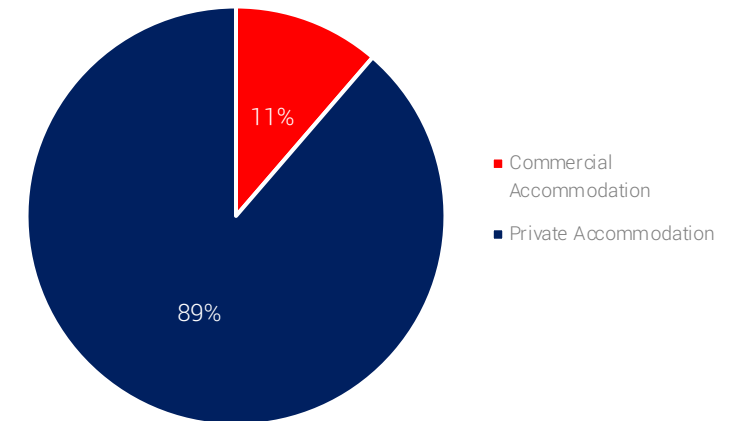
Private accommodation was the preferred choice of accommodation for international visitors to Western Melbourne (89%), this was mainly in the form of a friends or relative property (87%). Metropolitan Melbourne had much higher rates of commercial accommodation use (53%) compared to the West (11%).

F26. INTERNATIONAL VISITORS, ACCOMMODATION, 2022



Source: Visitation, IVS, Tourism Research Australia, 2022.

F27. INTERNATIONAL VISITORS, COMMERCIAL & PRIVATE ACCOMMODATION, 2022



Source: Visitation, IVS, Tourism Research Australia, 2022.

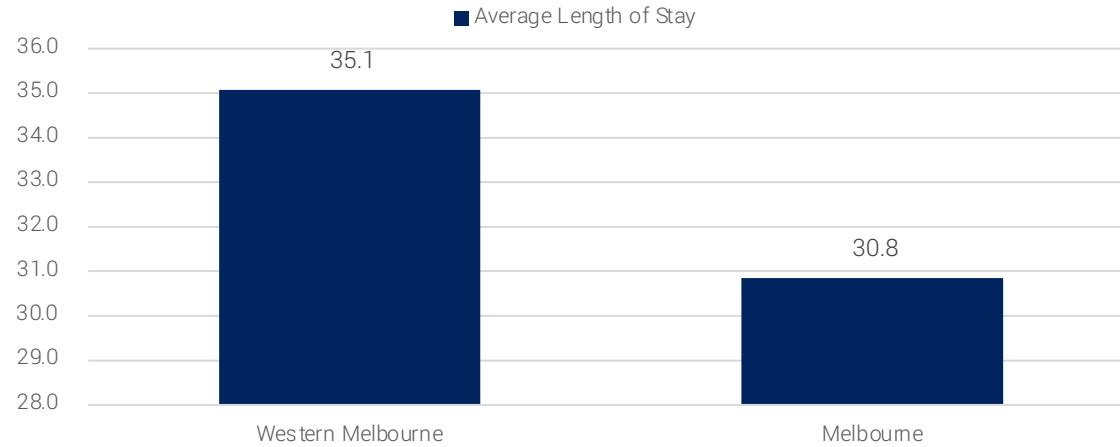
F28. INTERNATIONAL VISITORS, COUNTRY OF ORIGIN, 2022

	Western Melbourne	Melbourne
India	35%	15%
New Zealand	23%	16%
Other Asia	12%	10%
Other Countries	6%	6%
United States of America	5%	7%
United Kingdom	4%	10%
Singapore	3%	8%
Other Europe	2%	4%
Indonesia	2%	2%
Italy	1%	1%
Malaysia	1%	3%
Canada	1%	2%
Taiwan	1%	1%
Germany	1%	2%
France	1%	2%
Thailand	1%	2%
Japan	1%	1%
Scandinavia	0%	1%
Korea	0%	1%
China	0%	4%
Netherlands	0%	1%
Hong Kong	0%	2%
Switzerland	0%	0%

India was the primary international origin market for Western Melbourne, equating to 35% of visits. Travellers from New Zealand also represents a significant proportion of the market (23%).

Source: Visitation, IVS, Tourism Research Australia, 2022.

F29. INTERNATIONAL VISITORS, AVERAGE LENGTH OF STAY, 2022

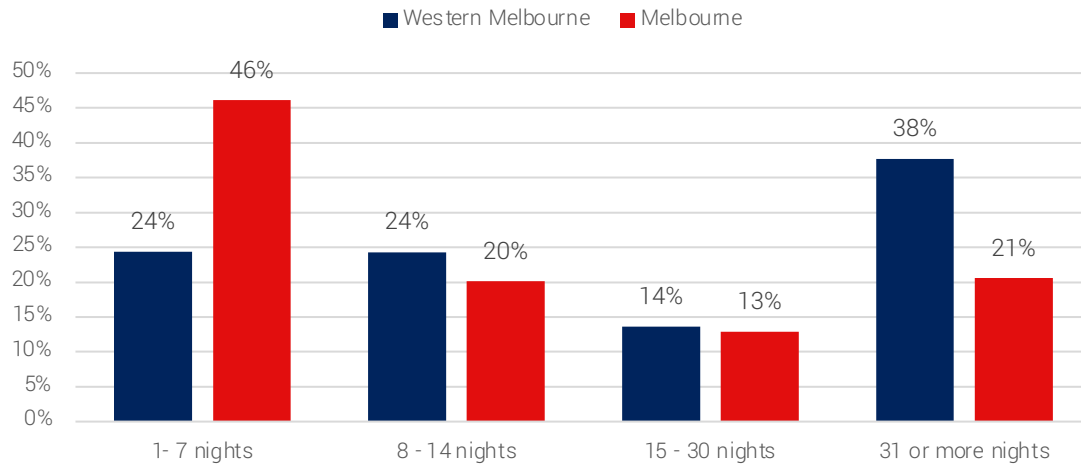


Source: Visitation, IVS, Tourism Research Australia, 2022.

The average length of stay for international visitors to Western Melbourne was 35 nights, which is a slightly higher average than Metropolitan Melbourne (31 nights).

Long length of stay is driven by students, workers and visitors staying with friends and relatives for extended periods.

F30. INTERNATIONAL VISITORS, LENGTH OF STAY, 2022

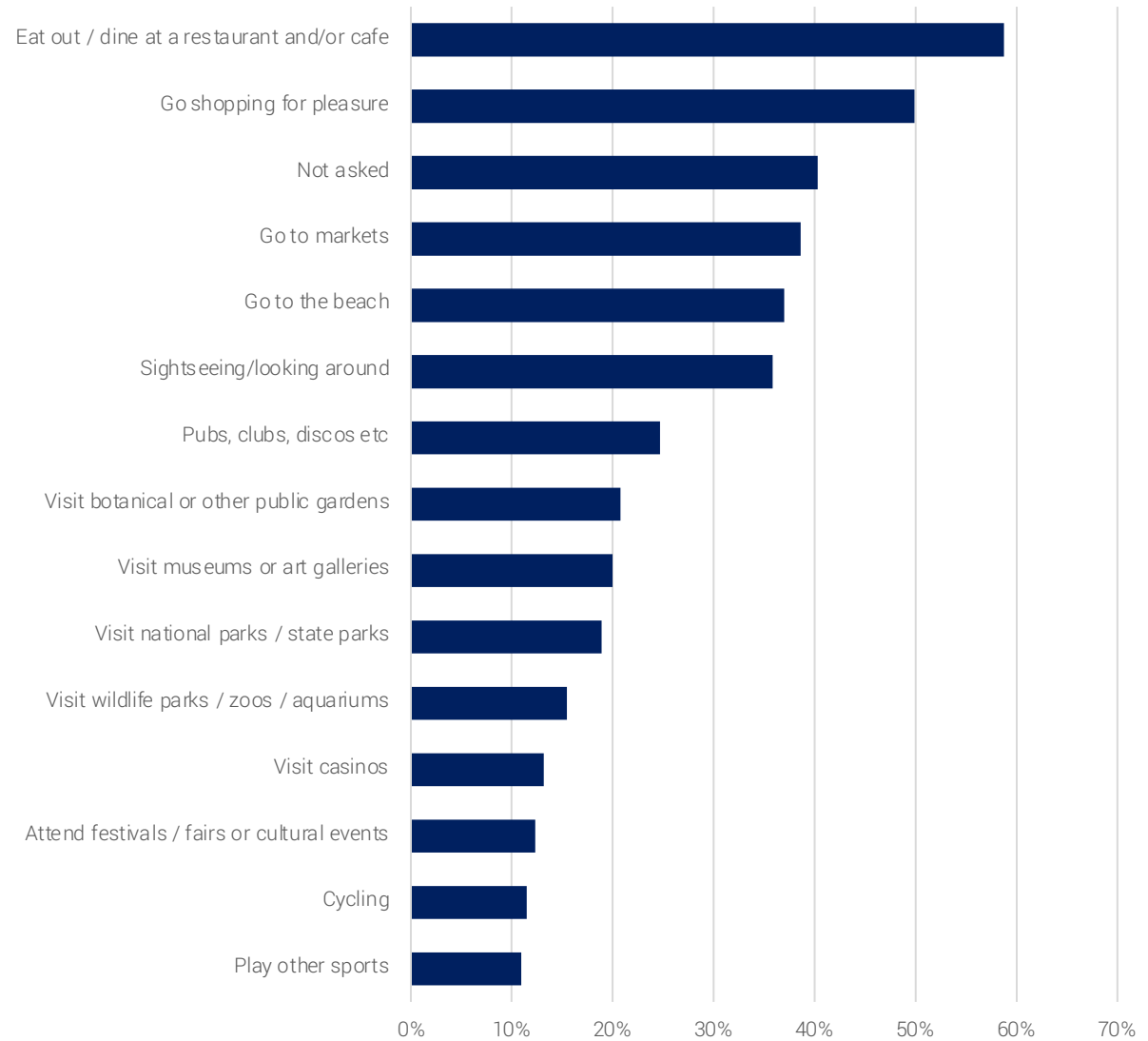


Source: Visitation, IVS, Tourism Research Australia, 2022.

Almost half of visitors to Metropolitan Melbourne (46%) stay less than a week. Only 24% of international travellers stay in Western Melbourne over the same time period. 38% stay in the West for 31 nights or more.

The most common activities undertaken by international visitors included eating out/dining out, going shopping, going to markets, the beach and sightseeing.

F31. INTERNATIONAL OVERNIGHT VISITORS, TOP 15 ACTIVITIES, 2022



Source: Visitation, IVS, Tourism Research Australia, 2022.

The NVS & IVS

National Visitor Survey (NVS)

Overview

The National Visitor Survey (NVS) commenced in January 1998. The aim of the survey is to gather data relating to the demographics, travel behaviour and attitudes of Australian residents towards tourism and to monitor changes and trends in these characteristics. In 2014 TRA introduced mobile phone interviewing where half of the sample are interviewed on mobile phones. This has changed some of the travel characteristics in the time series and data from 2014 onwards should be used with caution when comparing with earlier results. Data for 2017 and 2018 has been revised to align with the latest ABS population projections and will differ from previously published estimates.

Collection

The NVS is collected via a Computer Assisted Telephone Interview (CATI) and has an annual quota of 120,000 interviews (60,000 landline and 60,000 mobile).

Limitations

The NVS has the following limitations:

- Respondents are 15 years of age or over.
- Overnight – a trip where they stayed a night at least 40km from home.
- Daytrips - a round trip of at least 50km from home where they did not stay overnight at the destination.

International Visitor Survey (IVS)

Overview

The International Visitor Survey (IVS) represents the most comprehensive source of information on international visitors to Australia. It has been operating since the early 1970s and is jointly funded by the Commonwealth, State and Territory Governments under the guidance of the Australian Standing Committee on Tourism (ASCOT).

Collection

Every year, the International Visitor Survey samples 40,000 departing, short-term international travellers aged 15 years and over who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports; Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast. Prior to 2005 the sample size was 20,000 per year. There are currently 8,000 interviews conducted in Mandarin, Japanese and Korean each year.

Limitations

The IVS has the following limitations:

- Respondents are 15 years of age or over;
- Overseas visitors coming to Australia for a period of less than twelve months
- International visitors departing by sea are not interviewed; however they comprise less than 1% of the total visitors to Australia.
- TRA is unable to interview visitors in airline business lounges. Further research conducted by TRA suggests that this has little to no effect on the estimates.
- Sample sizes
- Due to the IVS being a sample survey TRA recommends the use of data with a sample of 40 persons or greater.

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