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CITY OF WYNDHAM TOURISM RESEARCH

COLLATION OF TOURISM RESEARCH AUSTRALIA DATA

CITY OF WYNDHAM | MAY 2020



www.urbanenterprise.com.au

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FILE

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VERSION

1

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VISITATION OVERVIEW

1.4 MILLION

TOTAL VISITORS

200K

DOMESTIC OVERNIGHT VISITORS

1.1 MILLION

DOMESTIC DAYTRIP VISITORS

70K

INTERNATIONAL OVERNIGHT VISITORS

DOMESTIC OVERNIGHT VISITORS



VISITING FRIENDS & RELATIVES



STAY WITH FRIENDS OR RELATIVES



TRAVEL ALONE

2.5 NIGHTS

AVERAGE LENGTH OF STAY

\$302

AVERAGE SPEND PER NIGHT



DOMESTIC DAYTRIP VISITORS



VISITING FRIENDS & RELATIVES



VISITING FOR A HOLIDAY



AGED 25-29 YEARS OF AGE



MALE VISITORS

\$112

AVERAGE SPEND PER TRIP



INTERNATIONAL OVERNIGHT VISITORS



VISITING FRIENDS & RELATIVES



STAY WITH FRIENDS AND RELATIVES



TRAVEL ALONE



AGED 55-59 YEARS OF AGE

\$119

AVERAGE SPEND PER NIGHT

VISITING
VISIT FRIENDS
& FAMILY

VISITING
FOR A HOLIDAY/
LEISURE

VISITING
FOR BUSINESS
REASONS



TRAVEL
PARTY

46%

TRAVEL ALONE

25%

ADULT COUPLES

35%

ADULT COUPLES

27%

FRIENDS AND/OR
RELATIVES

72%

TRAVEL ALONE



ACCOMMODATION

93%

STAY WITH FRIENDS &
RELATIVES

3%

STAY IN HOTELS/
MOTELS

37%

STAY WITH FRIENDS &
RELATIVES

29%

STAY IN HOTELS/
MOTELS

45%

STAY WITH FRIENDS &
RELATIVES

24%

STAY IN HOTELS/
MOTELS



ACTIVITIES

43%

EAT OUT AT
RESTAURANTS

21%

GO SHOPPING
FOR PLEASURE

56%

EAT OUT AT
RESTAURANTS

21%

VISIT A PUBLIC
GARDEN

44%

EAT OUT AT
RESTAURANTS

7%

VISIT PUBS
AND CLUBS



AVERAGE
STAY

3.9

NIGHTS

3.0

NIGHTS

2.2

NIGHTS

1. KEY FINDINGS

The following provides a summary of the key points from analysis of the TRA data:

VISITATION

- Overall visitation to the City of Wyndham has grown significantly between 2010 and 2019, at an average rate of 11% per annum. Domestic daytrip visitors comprise the largest proportion of total visitation (83%), however this is changing. Over the previous ten years, the proportion of international visitors has increased at a higher rate compared to daytrip visitation. Domestic daytrip visitation increased at an average rate of 11.5% per annum, domestic overnight visitation increased at an average rate of 7.1% per annum and international overnight visitation increased at a rate of 18.3% per annum.

EXPENDITURE

- Domestic day visitors to Wyndham spend an average of \$112 per trip. For domestic overnight visitors, the average spend per night is estimated at \$302, and for international overnight visitors it is \$119.

TRAVEL PARTY TYPE

- TRA data shows that a high proportion of domestic overnight visitors and international visitors to the region travelled alone (47% and 56% respectively). This is reflective of the high proportion of visitors visiting friends and relatives, and high proportion of solo business travellers to the region.
- The overall proportion of adult couples and family groups from the domestic overnight market slightly decreased.
- A higher proportion of business visitors travelled alone to the region (72%), compared with VFR visitors (46%) and holiday visitors (17%).

PURPOSE OF VISIT

- Visiting friends and relatives was the main reason for visit for domestic overnight visitors (67%), domestic daytrip visitors (41%) and international visitors (83%).
- The growth in visitors visiting friends and relatives is likely driven by the significant rate of residential development and population growth in the municipality.
- For domestic overnight visitors there was an increase in the proportion of people visiting friends and relatives and a decrease in the proportion of holiday and business visitors.
- The proportion of holiday visitors is much higher for the daytrip market compared to the overnight market, this may be reflective of the day attractions/activities available in Wyndham including the Werribee Open Range Zoo and Werribee Mansion. Domestic daytrip data shows that 13% of daytrip visitors visited wildlife parks in Wyndham in 2018-19.

ACCOMMODATION

- Overall a low proportion of domestic overnight and international visitors utilised commercial accommodation compared to non-commercial accommodation, with the majority of visitors staying with friends and relatives. This aligns with the high proportion of visitors who are visiting friends and relatives both as their purpose of visit, or as an activity during their visit. However, the proportion of domestic overnight visitors staying in commercial accommodation slightly increased, with 45% of business travellers staying in a Hotel/Resort/Motel or Motor Inn.
- A higher proportion of domestic overnight and international visitors to Melbourne and Geelong stay in commercial accommodation when benchmarked with Wyndham.

- TRA data shows VFR visitors tend to stay with friends and relatives (93%), while holiday and business visitors have a higher propensity to stay at a hotel (29% and 45%, respectively).

AGE PROFILE

- Domestic daytrip and overnight visitor results show a significant increase in the proportion of visitors aged between 25- 44 years from 2016-17 to 2018-19. This largely consists of business and holiday travellers to the region.
- There was a higher proportion of international visitors aged over 55. The proportion of International visitors aged between 55-59 years increased from 10% to 18%.
- There was a higher proportion of business travellers aged between 30-49 years, compared with visitors visiting friends and relatives, and holiday visitors.

VISITOR GENDER

- There was a slight increase in the proportion of male visitors for domestic daytrip and international visitors to Wyndham between 2016-17 to 2018-19.
- The domestic overnight market experienced an increase in the proportion of female travellers, and a slight decrease in male visitors.

VISITOR ACTIVITIES

- Visiting friends and relatives was the most popular activity for domestic overnight visitors, with 77% of overnight and 49% daytrip visitors participating in this activity, which is a higher proportion than visitors to Melbourne (48% and 39% respectively). Other popular activities undertaken in Wyndham by visitors included eating/dining out at restaurants or cafes, going shopping, going to pubs, visiting wildlife parks and visiting public gardens.
- People visiting friends and family and holiday visitors have a higher propensity to undertake more leisure-based activities than business visitors, such as going shopping, visiting wildlife parks, visiting public gardens and attend a sporting event.

VISITOR ORIGIN

- For domestic overnight visitors, there was an increase in the proportion of visitors originating from within Victoria between 2016-17 and 2018-19, increasing from 46% of total visitors to 70%, which is higher than Western Melbourne (65%) and Melbourne (40%).
- A significantly higher proportion of international visitors to Wyndham in 2018-19 were from India (35%), compared to visitors to Greater Geelong (4%), Western Melbourne (20%) and Melbourne (6%). There was also a significant increase in Indian visitors from 2016-17 (26%) to 2018-19 (35%). This is likely reflective of the changing cultural demographic of the local population of Wyndham associated with residential growth.

AVERAGE LENGTH OF STAY

- The average length of stay for overnight domestic visitors to Wyndham decreased from an average of 3.1 nights in 2016-17 to 2.5 nights in 2018-19. This brings the average length of stay in line with Greater Geelong (2.7), Western Melbourne (2.4 nights) and Melbourne (2.7 nights).
- People visiting friends and relatives tend to stay in the region longer than holiday and business travellers.
- International visitors to Wyndham stayed an average of 44 nights in 2017-18, which increased from 40 in 2016-17. International visitors to Wyndham also stayed slightly longer on average compared to international visitors to Greater Geelong (22 nights), Western Melbourne (38 nights) and Melbourne (22 nights).
- Business visitors stay an average of 2.3 nights, compared to holiday visitors who stay an average of 3 nights and VFR visitors stay an average of 3.8 nights.

2. INTRODUCTION

2.1. OVERVIEW

The following report has been prepared by Urban Enterprise for the City of Wyndham.

The report provides collation of Tourism Research Australia's (TRA), National Visitor Survey (NVS) and International Visitor Survey (IVS) data for the City of Wyndham (**Wyndham**), benchmarked with the Western Melbourne region (**Western Melbourne**), City of Greater Geelong (**Greater Geelong**) and metropolitan Melbourne (**Melbourne**). These regions are shown in Figure 1 below.

F1. DATA REGIONS



Source: Tourism Research Australia, 2020 – edited by Urban Enterprise.

2.2. TOURISM RESEARCH AUSTRALIA DATA

NATIONAL VISITOR SURVEY DATA

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.

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 DATA

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). In 2015.

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.

NOTE TO READER

Please note, there have been changes to TRA data reporting that affect results including comparison of results to previous reports, these include:

- 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 data from 2014 onwards should be used with caution when comparing with earlier results.
- TRA have implemented changes to the Australian Statistical Geography Standard (ASGS) in 2016 including the SA2 data collection boundaries, which may have resulted in some visitation not being accurately attributed to new smaller SA2 regions.
- Revision of IVS data - The release of December 2018 data includes purpose of visit information and revisions to the IVS estimates from 2005 to 2018. Therefore, IVS results published in previous reports may differ to that which is presented in this report.

3. VISITATION

3.1. INTRODUCTION

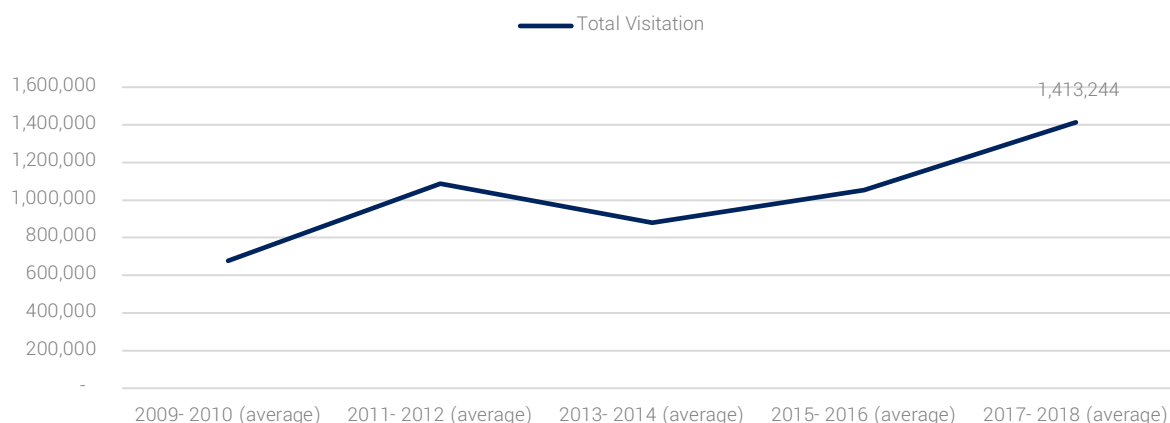
The following section provides a summary of visitation to the City of Wyndham. The data is presented as 2-year averages of visitation, which provides a more statistically reliable sample size.

T1. VISITATION TO THE CITY OF WYNDHAM (2 YEAR AVERAGE)

	Overnight Domestic Visitation	Domestic Daytrip Visitation	International Visitation	TOTAL
2010- 2011 (average)	129,220	526,798	21,286	677,304
2012- 2013 (average)	196,621	858,720	32,529	1,087,870
2014- 2015 (average)	172,793	670,307	37,984	881,084
2016- 2017 (average)	176,189	828,657	49,020	1,053,867
2018- 2019 (average)	201,760	1,141,609	69,875	1,413,244

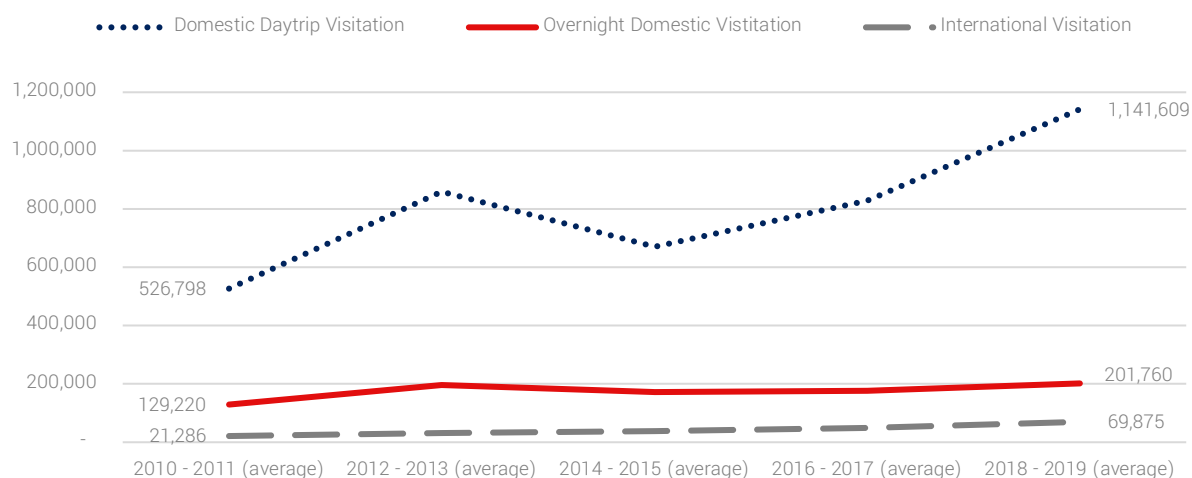
Source: Tourism Research Australia – NVS and IVS – 2010-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020..

F2. TOTAL VISITATION TO THE CITY OF WYNDHAM (2 YEAR AVERAGE)



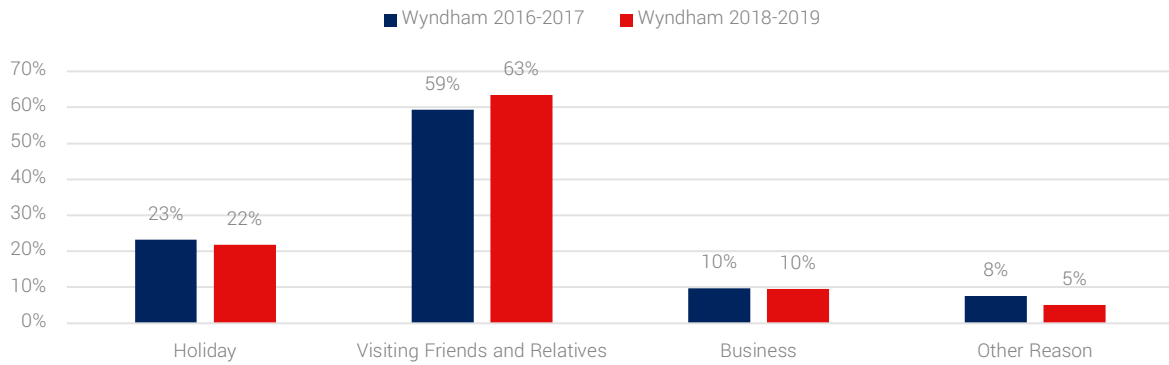
Source: Tourism Research Australia – NVS and IVS – 2010-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

F3. VISITATION TO THE CITY OF WYNDHAM - SUB MARKETS (2 YEAR AVERAGE)



Source: Tourism Research Australia – NVS and IVS – 2010-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

F4. ALL VISITORS TO THE CITY OF WYNDHAM – REASON FOR STOPOVER



Source: Tourism Research Australia – NVS – 2010-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

Other reasons include: Employment, education, medical reasons, personnel appointment, providing transport, attending a funeral, transit.

3.2. AVERAGE SPEND

T2. AVERAGE SPEND

	Domestic Day	Domestic Overnight	International
Average Spend Per Trip	\$112	\$834	\$2,622
Average Spend Per Night	-	\$302	\$119

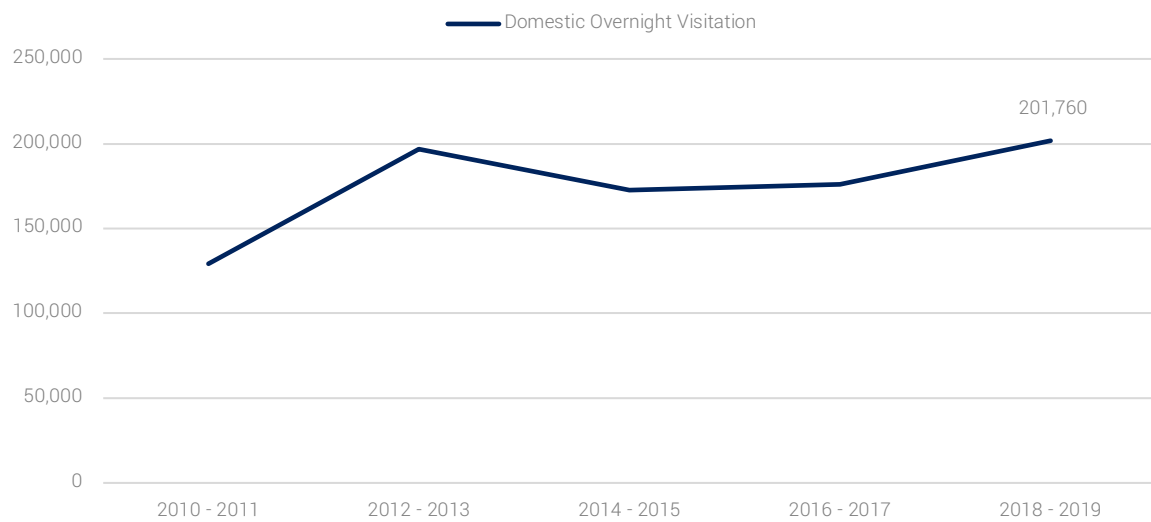
Source: Tourism Research Australia – published on Remplan economic profile for Wyndham

4. DOMESTIC OVERNIGHT VISITORS

This section of the report presents data relating to domestic overnight visitors to the City of Wyndham, benchmarked with Western Melbourne, Greater Geelong and Melbourne. The data is presented in 2 year averages to ensure a reliable sample size.

4.1. VISITOR TRIPS

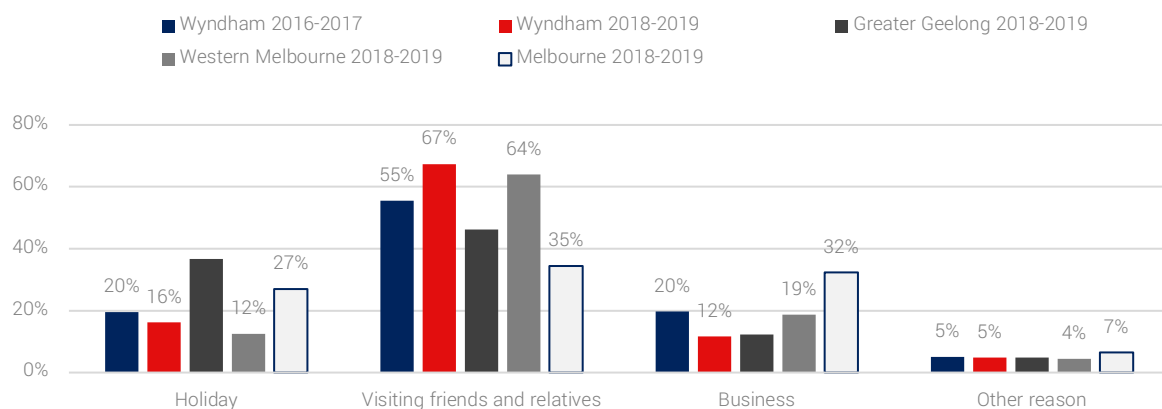
F5. DOMESTIC OVERNIGHT VISITORS TO THE CITY OF WYNDHAM



Source: Tourism Research Australia – NVS – 2010-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

4.2. REASON FOR STOPOVER

F6. DOMESTIC OVERNIGHT VISITORS – REASON FOR STOPOVER

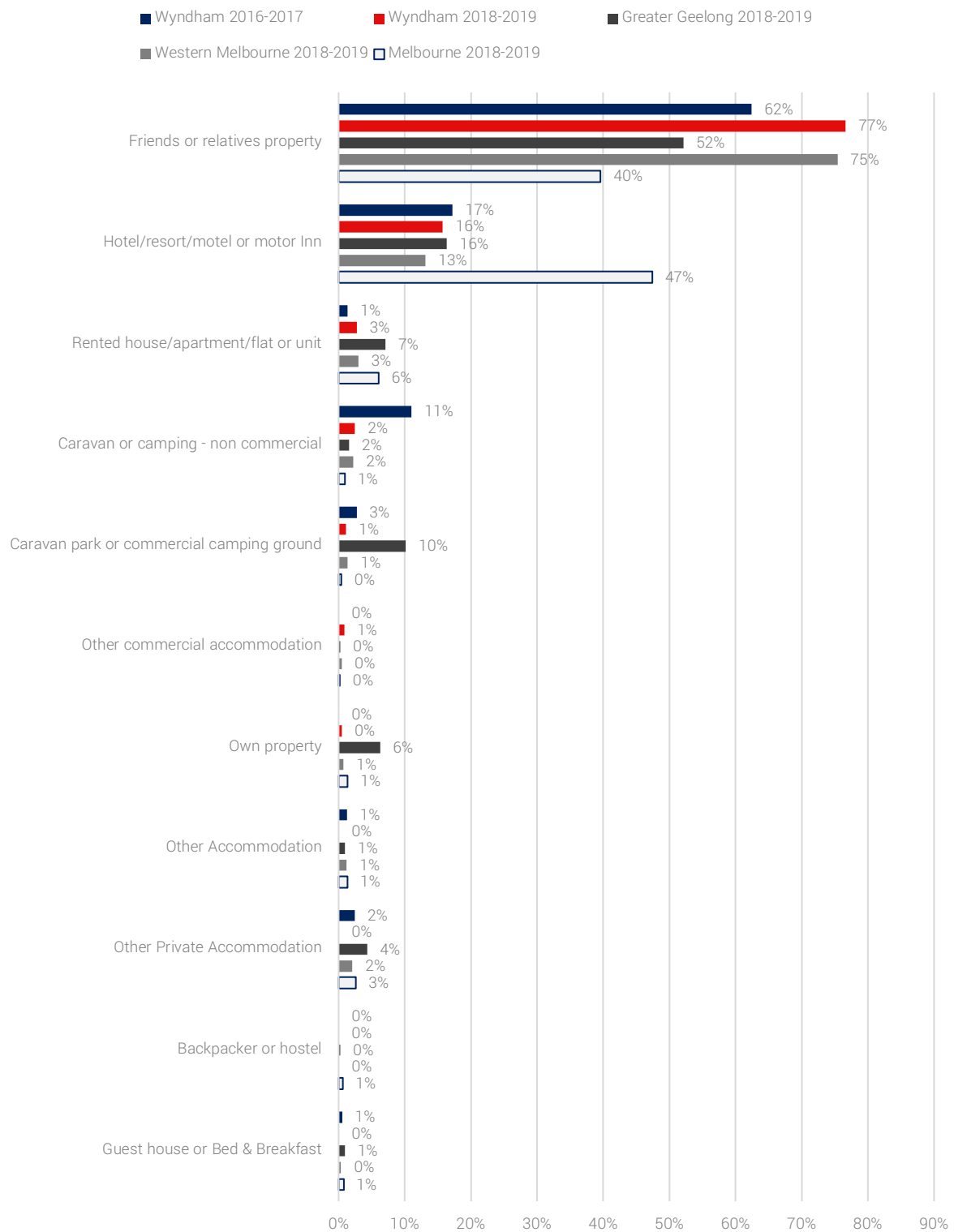


Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

Other reasons include: Employment, education, medical reasons, personnel appointment, providing transport, attending a funeral, transit.

4.3. ACCOMMODATION

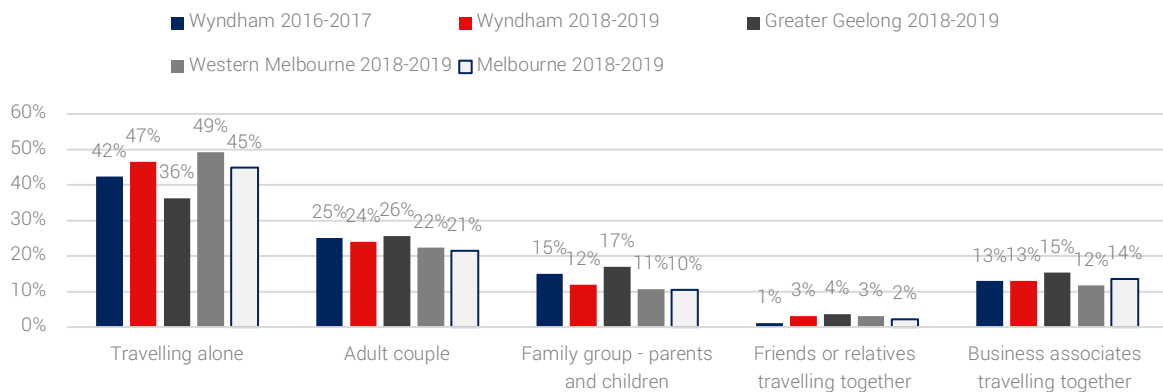
F7. DOMESTIC OVERNIGHT VISITORS – ACCOMMODATION



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

4.4. TRAVEL PARTY TYPE

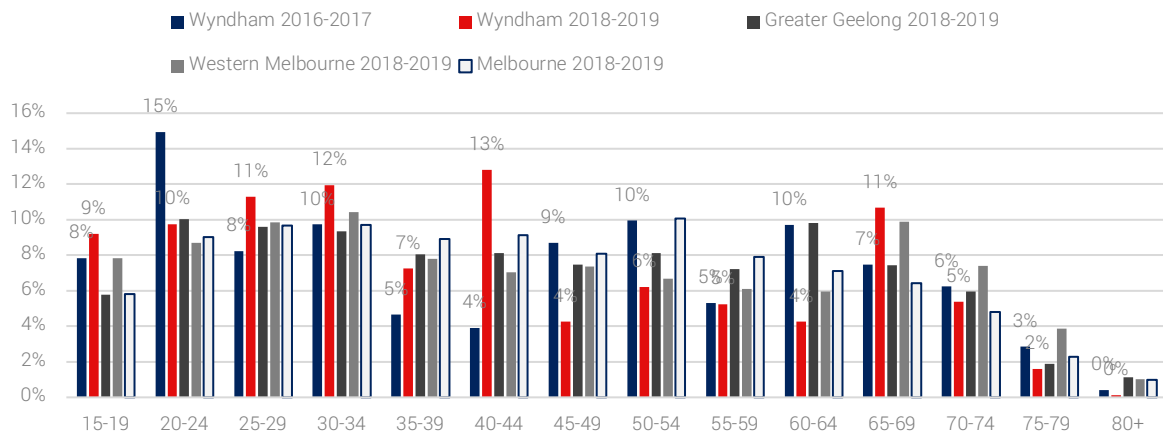
F8. DOMESTIC OVERNIGHT VISITORS – TRAVEL PARTY TYPE



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

4.5. VISITOR AGE PROFILE

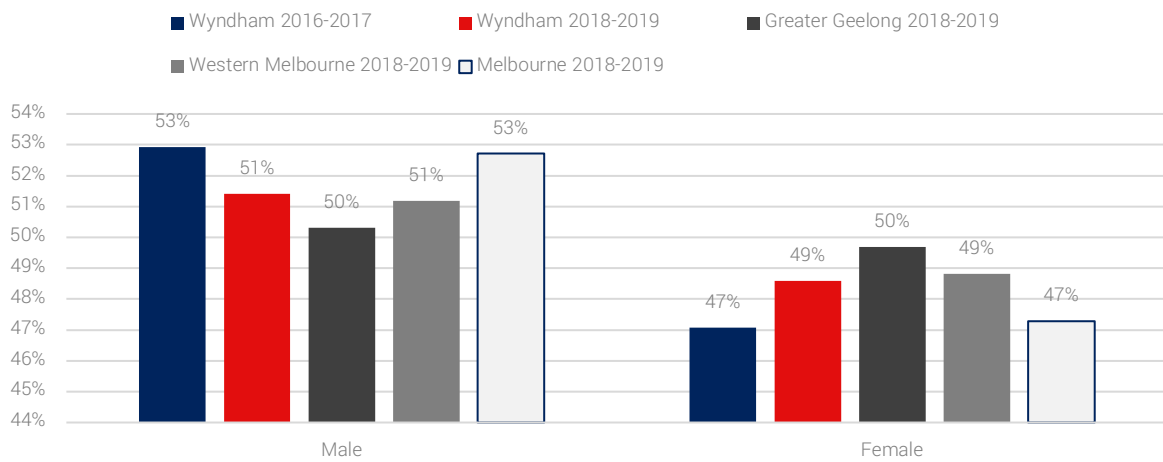
F9. DOMESTIC OVERNIGHT VISITORS – AGE PROFILE



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

4.6. VISITOR GENDER

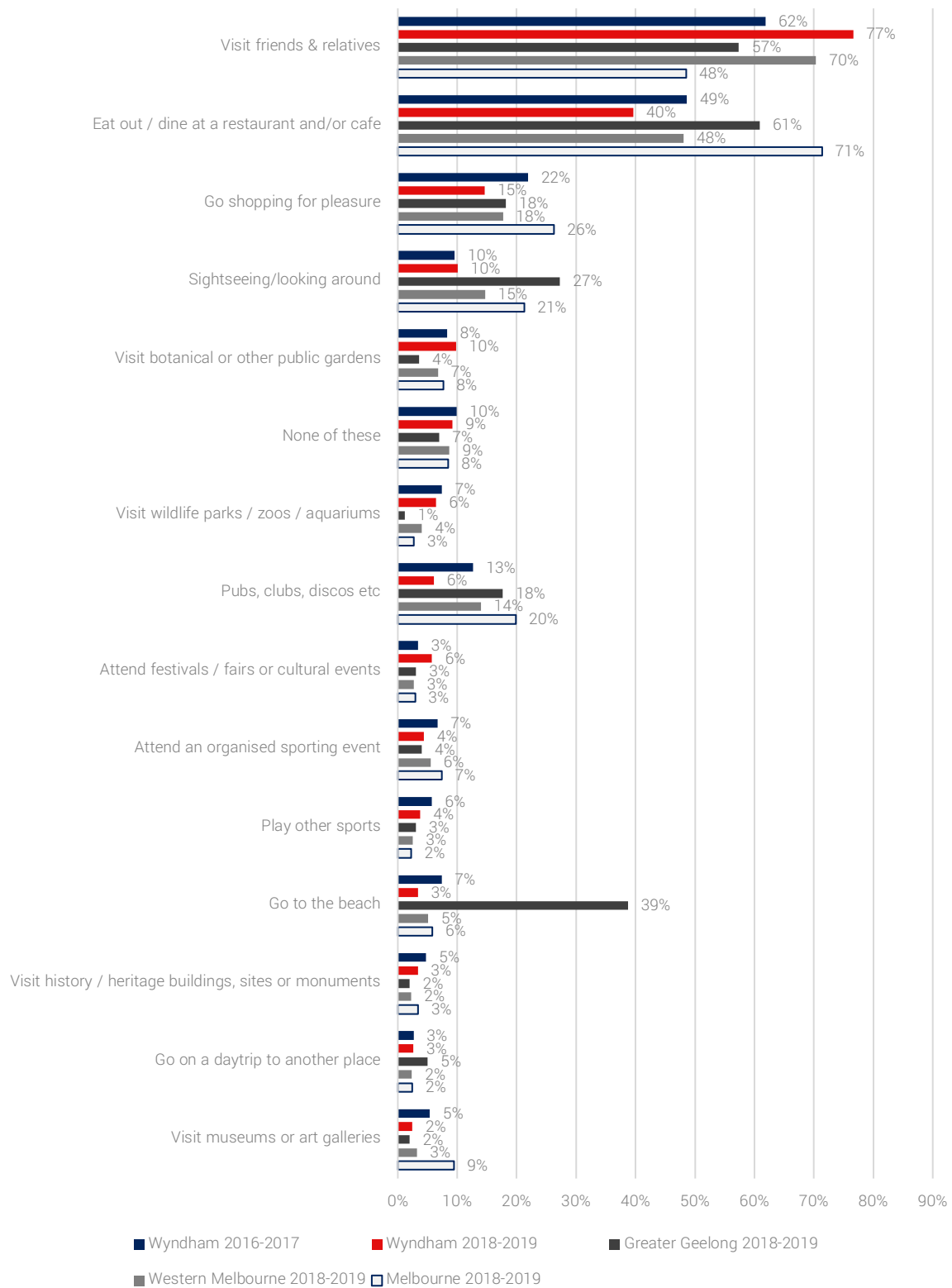
F10. DOMESTIC OVERNIGHT VISITORS – GENDER OF VISITORS



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

4.7. STOPOVER ACTIVITIES

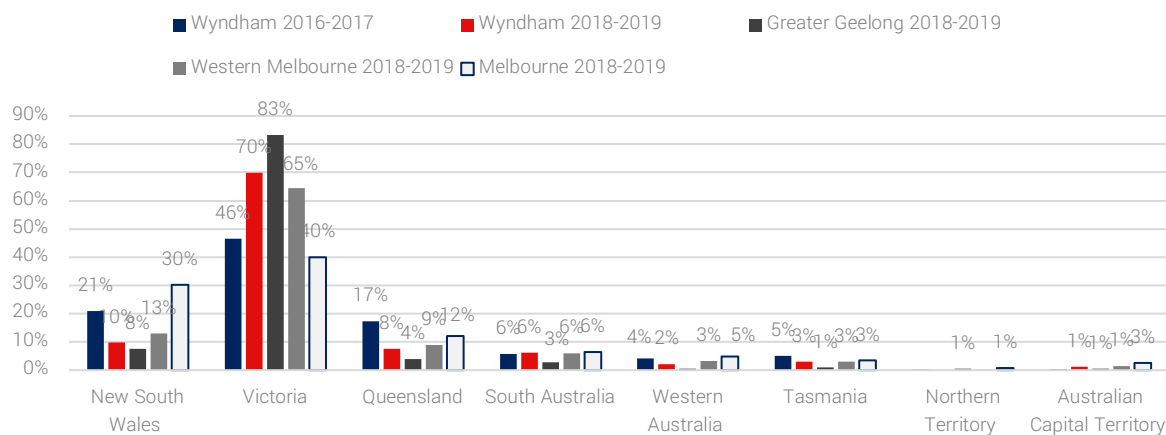
F11. DOMESTIC OVERNIGHT VISITORS – TOP 15 STOPOVER ACTIVITIES



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

4.8. HOME STATE

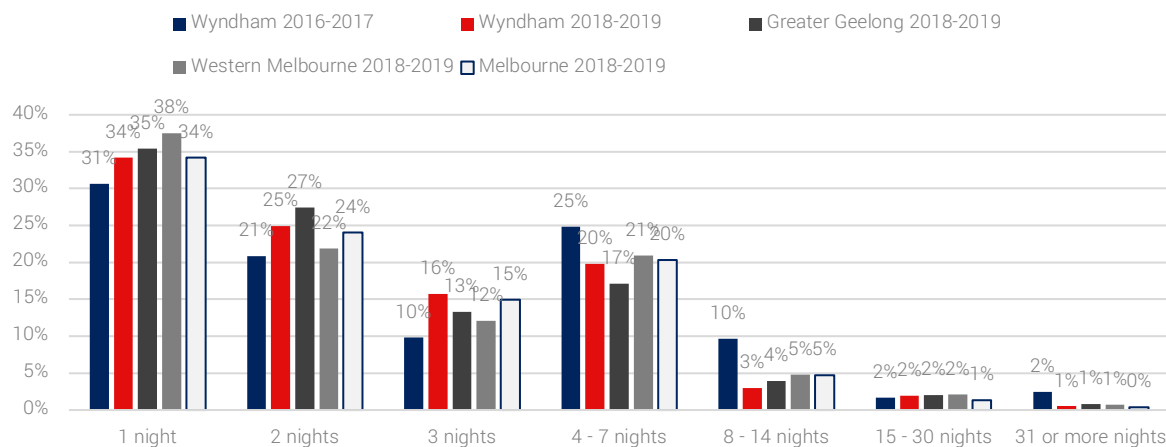
F12. DOMESTIC OVERNIGHT VISITORS – HOME STATE



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

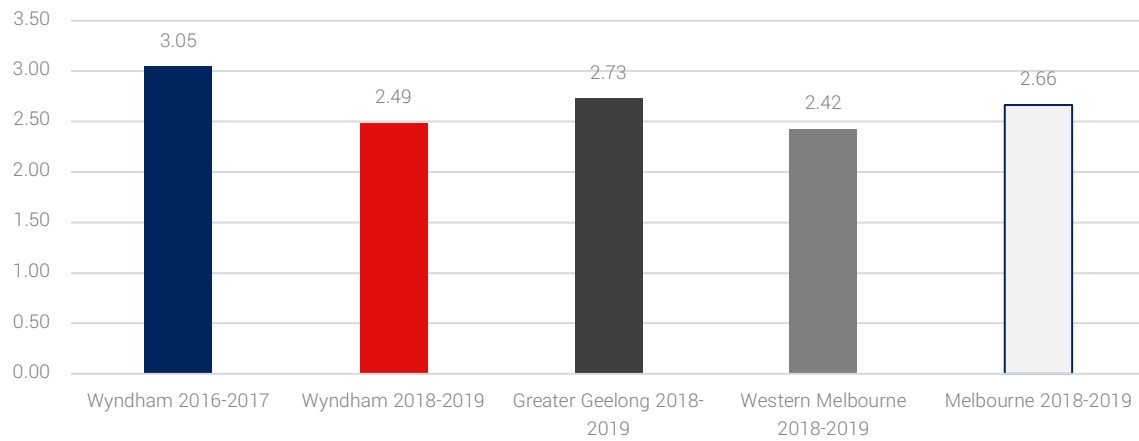
4.9. LENGTH OF STAY IN REGION

F13. DOMESTIC OVERNIGHT VISITORS – LENGTH OF STAY IN REGION



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

F14. DOMESTIC OVERNIGHT VISITORS– AVERAGE LENGTH OF STAY (NIGHTS)



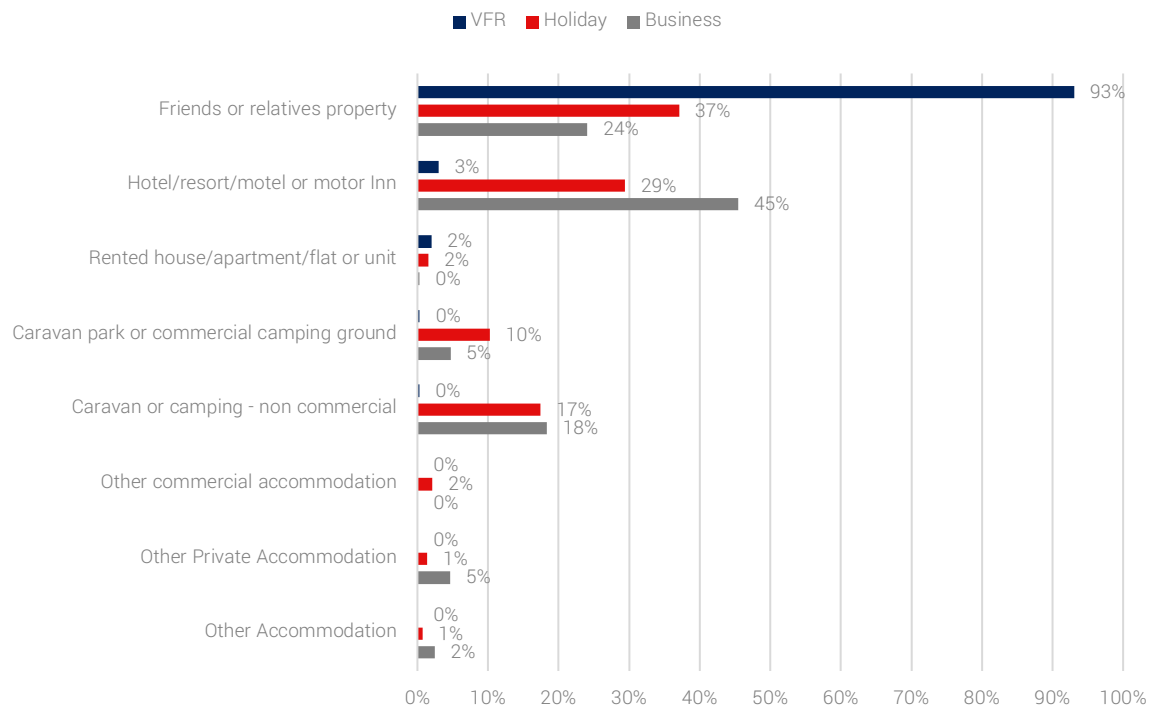
Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

4.10. SUB-SECTOR ANALYSIS

This section presents data relating to sub-sectors of the domestic overnight visitor market to the City of Wyndham. The data is presented in 5 year averages.

4.10.1. ACCOMMODATION

F15. ACCOMMODATION

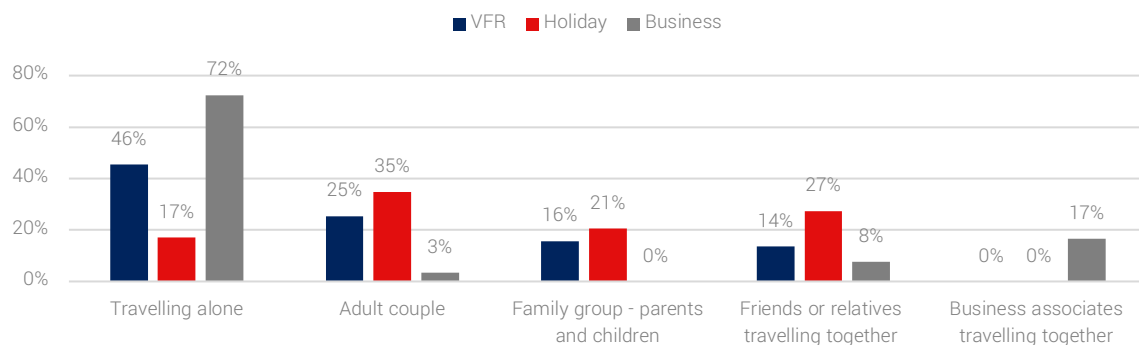


Source: Tourism Research Australia – NVS – 2015-2019 – presented as 5 year averages – compiled by Urban Enterprise, 2020.

*Please note that the survey sample size for accommodation stayed in by business visitors is skewed by survey results reported in 2015 and 2016, which reported a higher proportion of business visitors staying in non-commercial caravan/camping grounds than in other years. Caution should be taken when analysing this data.

4.10.2. TRAVEL PARTY TYPE

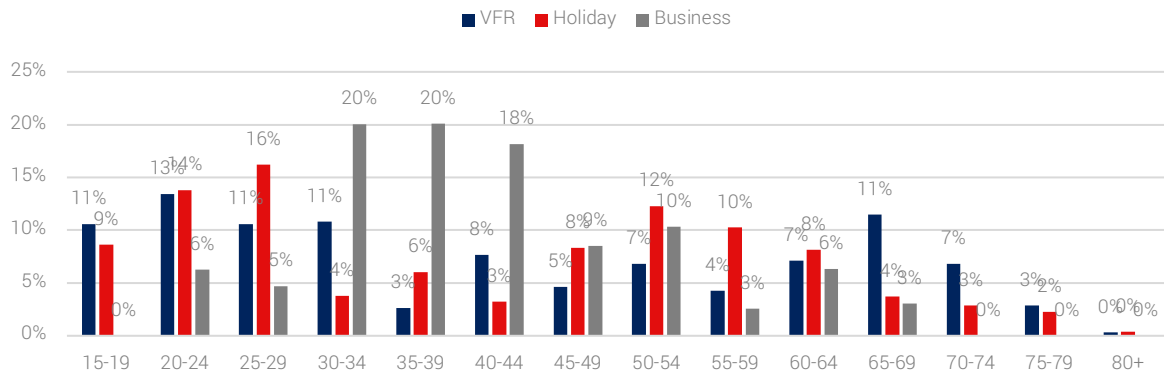
F16. TRAVEL PARTY TYPE



Source: Tourism Research Australia – NVS – 2015-2019 – presented as 5 year averages – compiled by Urban Enterprise, 2020.

4.10.3. VISITOR AGE PROFILE

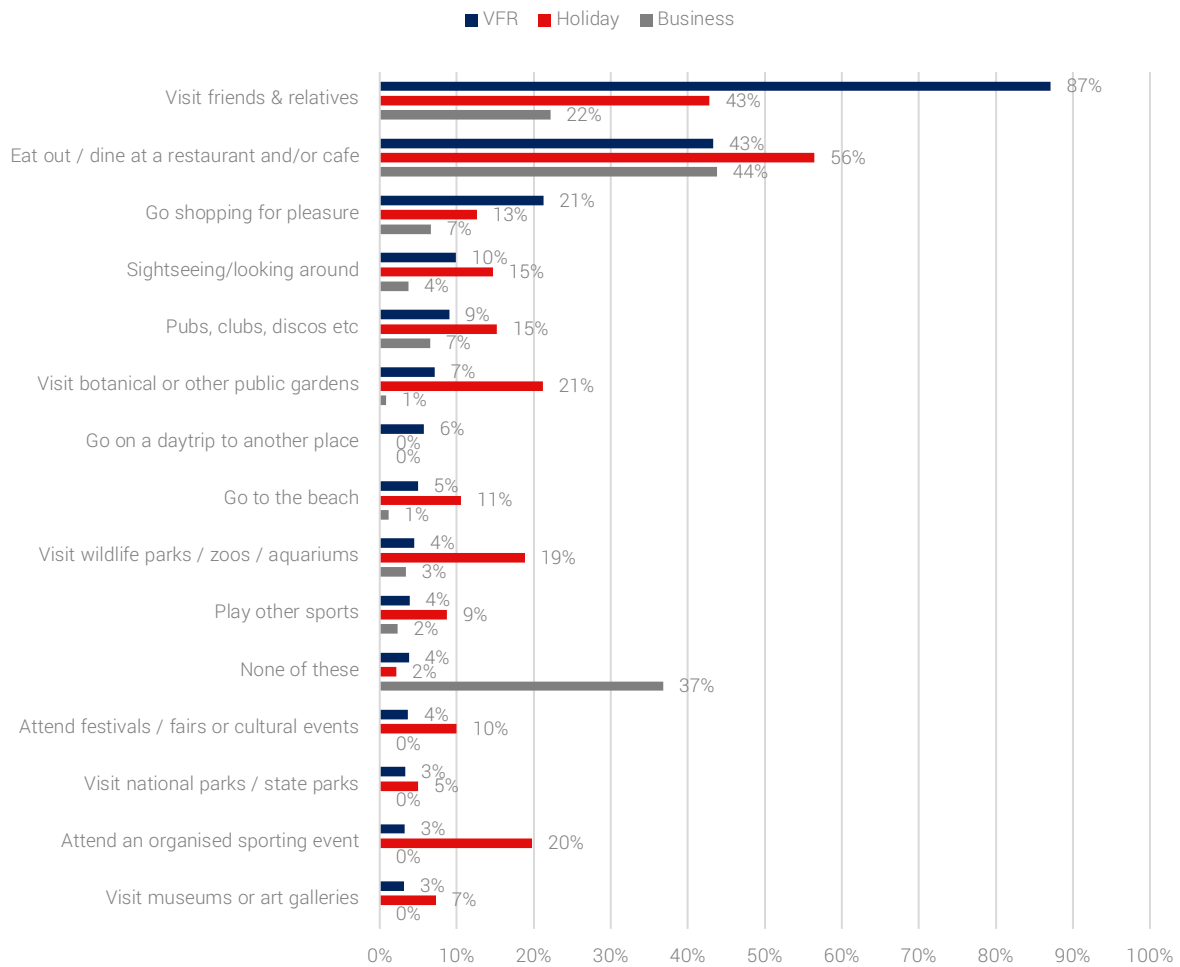
F17. AGE PROFILE



Source: Tourism Research Australia – NVS – 2015-2019 – presented as 5 year averages – compiled by Urban Enterprise, 2020.

4.10.4. STOPOVER ACTIVITIES

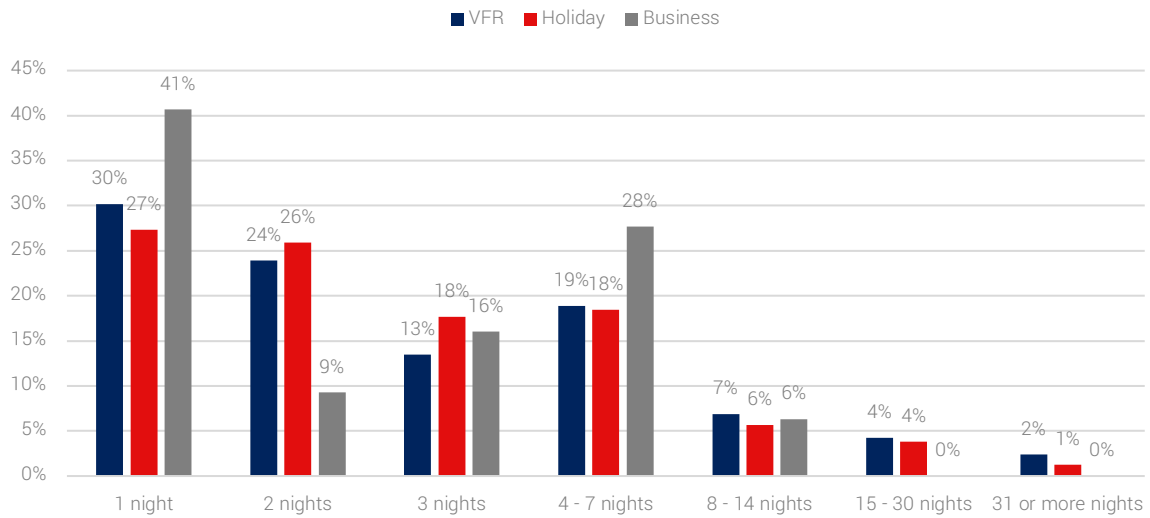
T3. TOP 15 STOPOVER ACTIVITIES



Source: Tourism Research Australia – NVS – 2015-2019 – presented as 5 year averages – compiled by Urban Enterprise, 2020.

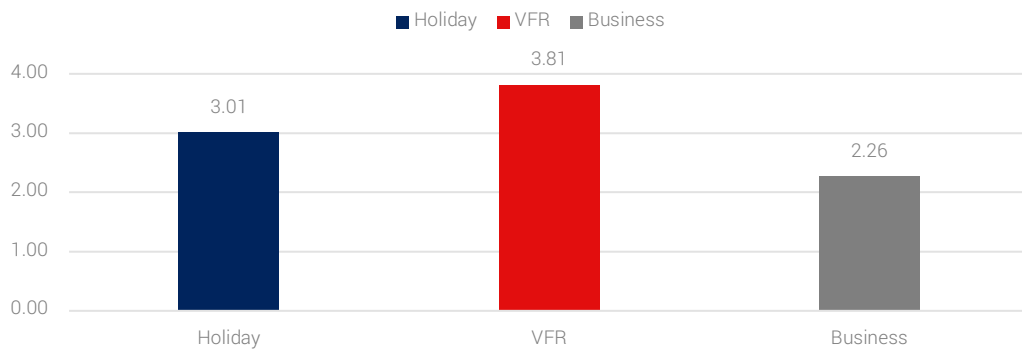
4.10.5. LENGTH OF STAY IN REGION

F18. LENGTH OF STAY IN REGION



Source: Tourism Research Australia – NVS – 2015-2019 – presented as 5 year averages – compiled by Urban Enterprise, 2020.

F19. AVERAGE LENGTH OF STAY (NIGHTS)



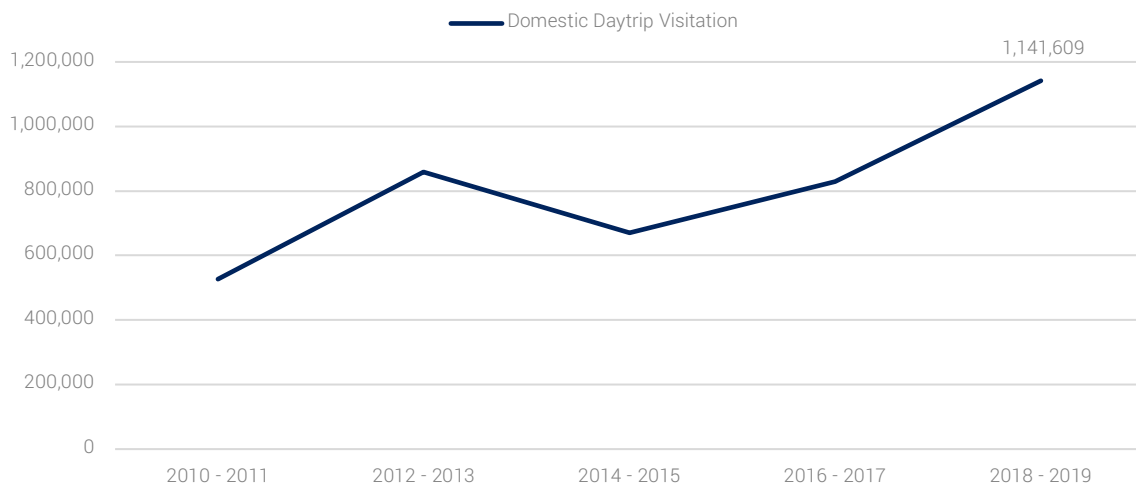
Source: Tourism Research Australia – NVS – 2015-2019 – presented as 5 year averages – compiled by Urban Enterprise, 2020.

5. DOMESTIC DAYTRIP VISITORS

This section of the report presents data relating to domestic daytrip visitors to the City of Wyndham, benchmarked with Western Melbourne, Melbourne and Greater Geelong. The data is presented in 2 year averages to ensure a reliable sample size.

5.1. VISITOR TRIPS

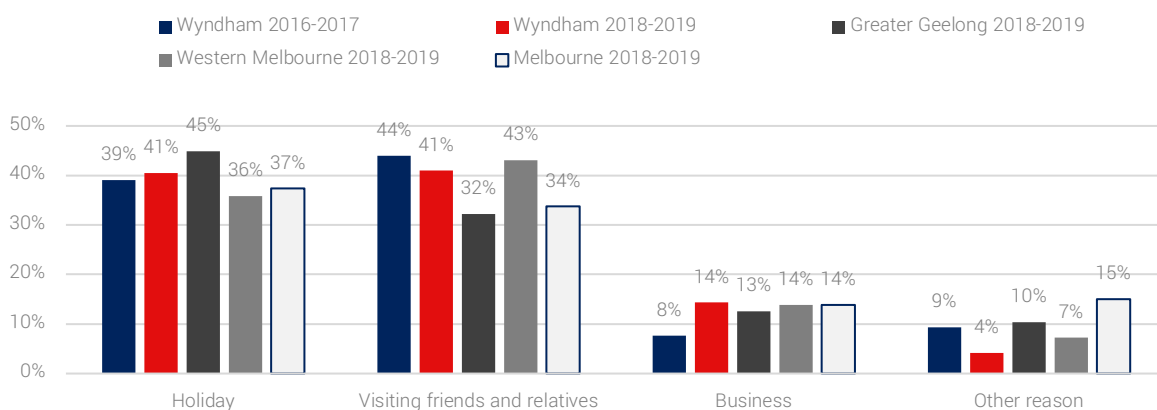
F20. DOMESTIC DAYTRIP VISITORS TO THE CITY OF WYNDHAM



Source: Tourism Research Australia – NVS – 2010-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

5.2. REASON FOR STOPOVER

F21. DOMESTIC DAYTRIP VISITORS – REASON FOR STOPOVER

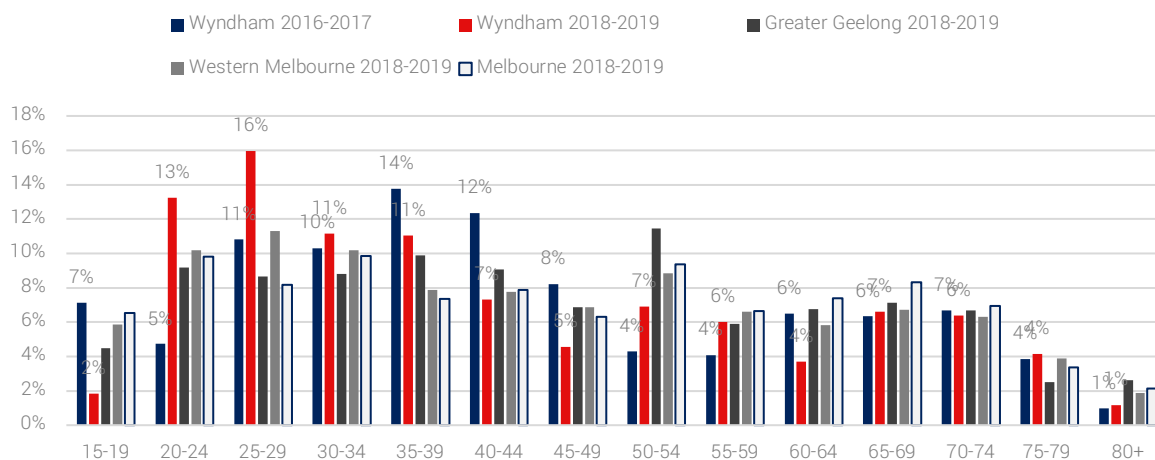


Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

Other reasons include: Employment, education, medical reasons, personnel appointment, providing transport, attending a funeral.

5.3. VISITOR AGE PROFILE

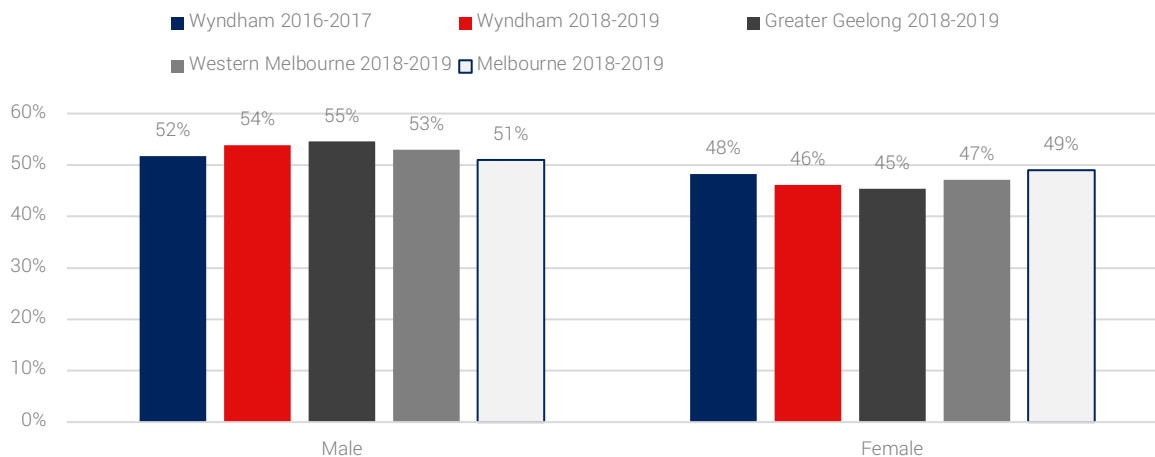
F22. DOMESTIC DAYTRIP VISITORS – AGE PROFILE



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

5.4. VISITOR GENDER

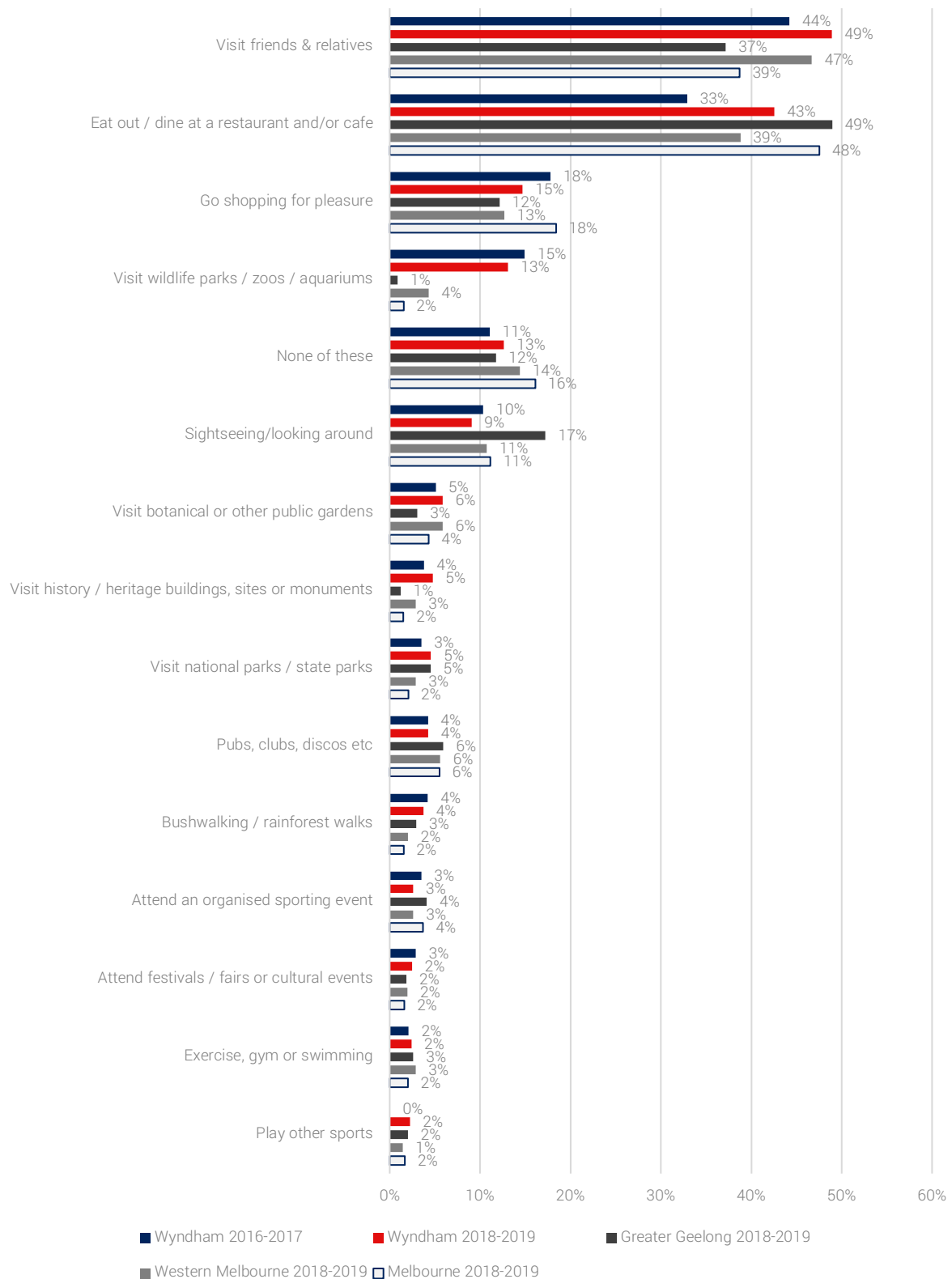
DOMESTIC DAYTRIP VISITORS – GENDER



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

5.5. STOPOVER ACTIVITIES

F23. DOMESTIC DAYTRIP VISITORS – TOP 15 ACTIVITIES



Source: Tourism Research Australia – NVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

6. INTERNATIONAL VISITORS

This section of the report presents data relating to international visitors to the City of Wyndham, benchmarked with Greater Geelong, Western Melbourne, Melbourne and Greater Geelong. The data is presented in 2 year averages to ensure a reliable sample size.

6.1. VISITOR TRIPS

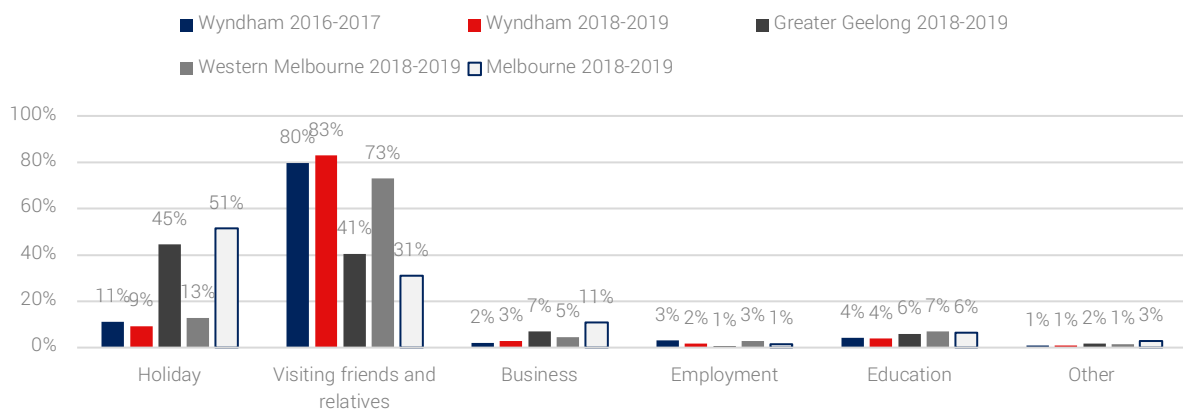
F24. INTERNATIONAL VISITORS TO THE CITY OF WYNDHAM



Source: Tourism Research Australia – IVS – 2010-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

6.2. REASON FOR STOPOVER

F25. INTERNATIONAL VISITORS – REASON FOR STOPOVER

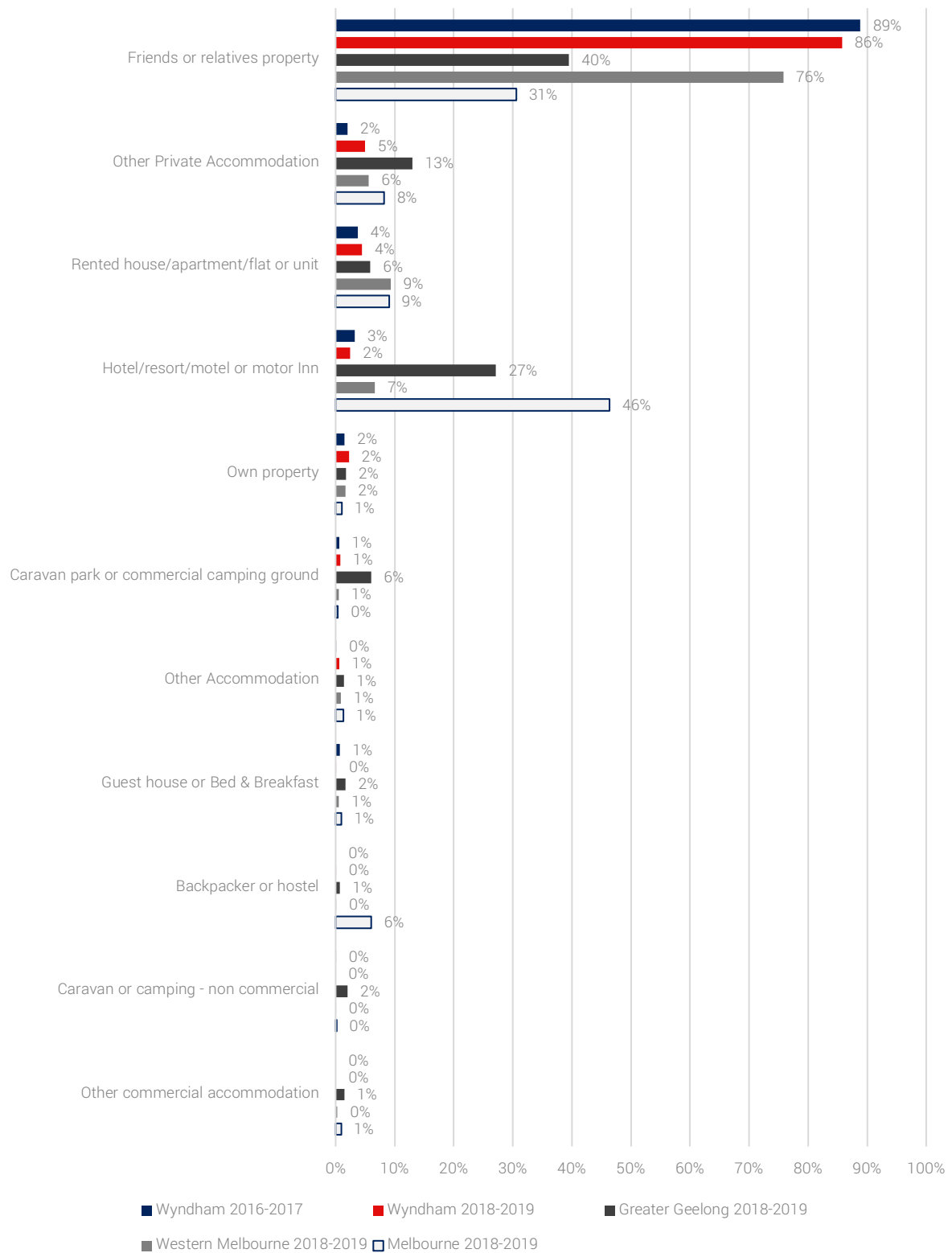


Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

Other reasons include: Employment, education, medical reasons, personnel appointment, providing transport, attending a funeral, transit.

6.3. ACCOMMODATION

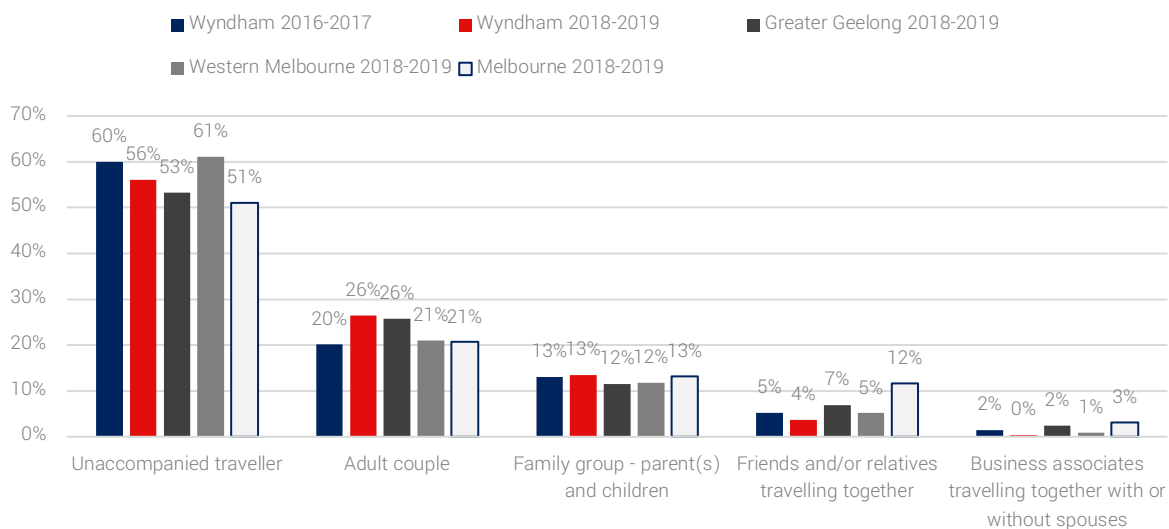
F26. INTERNATIONAL VISITORS - ACCOMMODATION



Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

6.4. TRAVEL PARTY TYPE

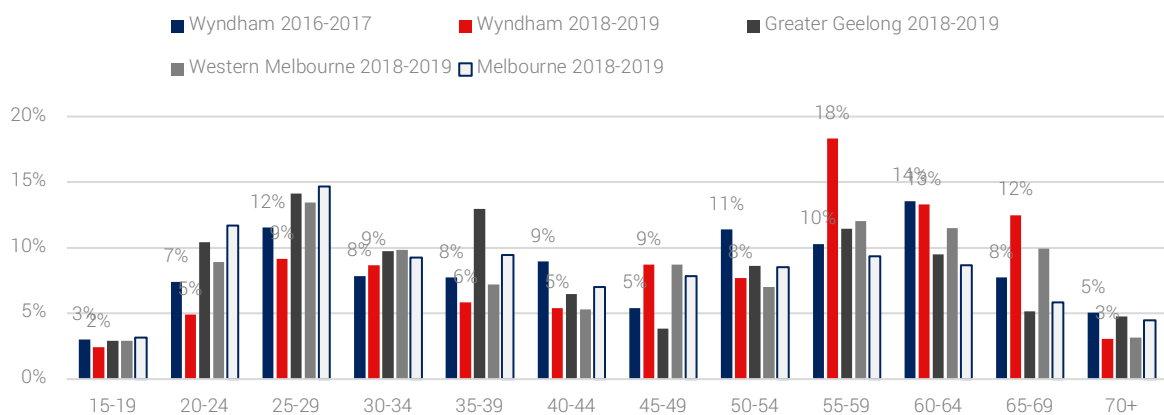
F27. INTERNATIONAL VISITORS – TRAVEL PARTY TYPE



Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

6.5. VISITOR AGE PROFILE

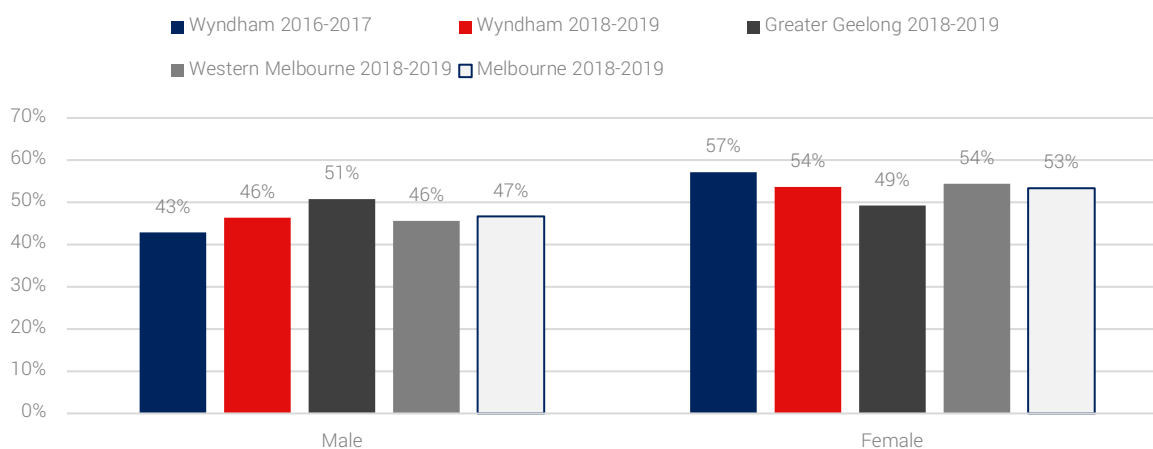
F28. INTERNATIONAL VISITORS – AGE PROFILE



Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

6.6. VISITOR GENDER

F29. INTERNATIONAL VISITORS – GENDER



Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

6.7. COUNTRY OF RESIDENCE

T4. INTERNATIONAL VISITORS – TOP 15 COUNTRIES OF RESIDENCE

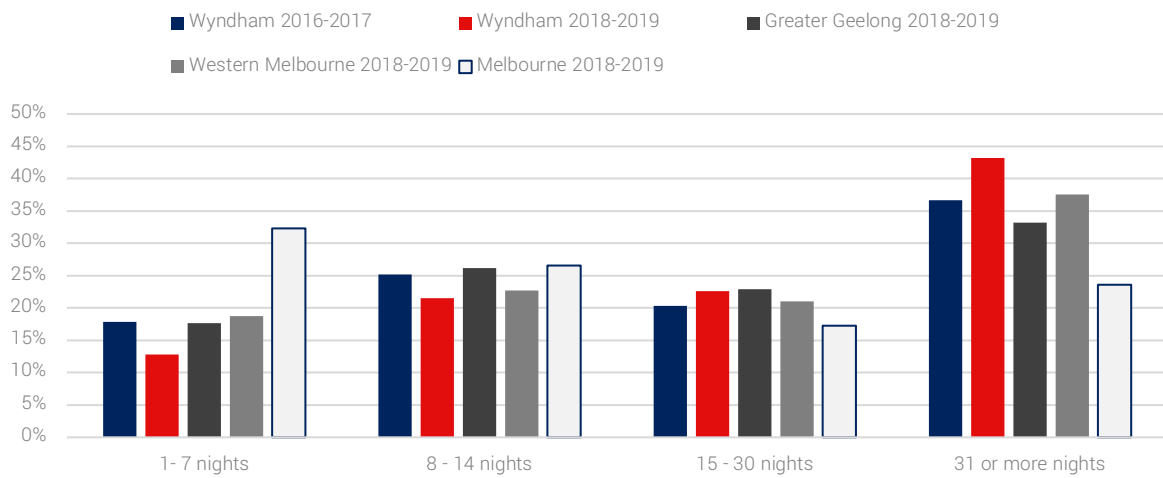
	Wyndham 2016-2017	Wyndham 2018-2019	Greater Geelong 2018-2019	Western Melbourne 2018-2019	Melbourne 2018-2019
India	26%	35%	4%	20%	6%
New Zealand	22%	15%	11%	18%	11%
Other Asia*	6%	15%	6%	15%	6%
China	7%	8%	15%	6%	22%
Other Countries	8%	5%	5%	6%	5%
United Kingdom	7%	4%	11%	7%	7%
Malaysia	5%	4%	5%	4%	5%
Singapore	3%	3%	6%	3%	4%
United States of America	3%	3%	8%	5%	8%
Hong Kong	2%	2%	2%	1%	4%
Taiwan	1%	2%	2%	1%	2%
Canada	1%	1%	2%	2%	2%
Indonesia	2%	1%	1%	1%	3%
Thailand	1%	1%	1%	1%	1%
Korea	1%	1%	2%	1%	2%

Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

*Primary country of origin for 'other Asia' includes Pakistan, Sri-Lanka, the Philippines, Bangladesh, Viet Nam, Cambodia, Myanmar and Nepal.

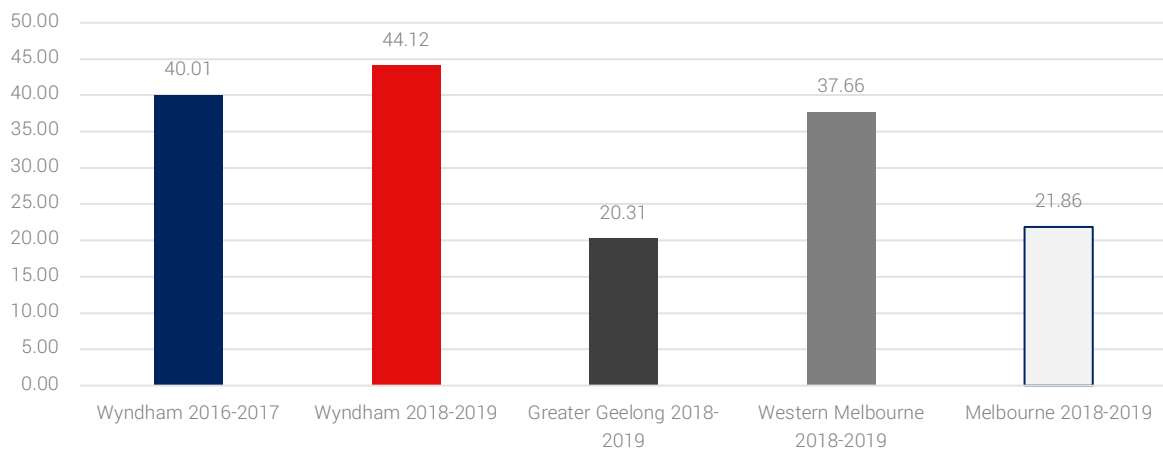
6.8. NUMBER OF NIGHTS STAY

F30. INTERNATIONAL VISITORS – NUMBER OF NIGHTS STAY



Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

INTERNATIONAL VISITORS–AVERAGE LENGTH OF STAY (NIGHTS)



Source: Tourism Research Australia – IVS – 2016-2017 and 2018-2019 – presented as 2 year averages – compiled by Urban Enterprise, 2020.

