

Phillip Island

Regional Tourism Summary

Year Ending December 2018



Tourism is an important industry for Phillip Island¹. The region received approximately 2.2 million domestic (overnight and daytrip) and international overnight visitors combined, who spent an estimated \$474 million in the year ending December 2018.



GROSS REGIONAL PRODUCT

GRP	% OF ECONOMY
\$407M ▲ 5.3%	39.1% ▼ 0.6%pts



TOURISM EMPLOYMENT

JOBS	% OF ECONOMY
4,400 ▲ 5.2%	39.5% ▲ 0.4%pts



DOMESTIC OVERNIGHT

SPEND	VISITORS
\$338M ▼ -5.6%	906,000 ▼ -3.3%



DOMESTIC DAYTRIPS

SPEND	DAYTRIPS
\$113M ▲ 3.8%	1.2M ▼ -12.0%



INTERNATIONAL OVERNIGHT

SPEND	VISITORS
\$23M ▲ 46.4%	62,000 ▲ 19.5%

VALUE OF TOURISM

In 2016-17, tourism was estimated to be worth \$407 million to the region's economy (in direct and indirect Gross Regional Product), representing 39.1 per cent of the region's economy.

Tourism generated employment of approximately 4,400 people or 39.5 per cent of the region's employment (direct and indirect jobs).

DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Phillip Island in the year ending December 2018 was estimated to be \$338 million (-5.6 per cent from the previous period), with visitors spending an average of \$144 per night and \$373 per visitor.

DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$113 million in the year ending December 2018, an increase of 3.8 per cent compared to the previous year.

INTERNATIONAL OVERNIGHT SPEND

International overnight expenditure in Phillip Island was estimated to be \$23 million in the year ending December 2018, an increase of 46.4 per cent year-on-year.

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Key Regional Tourism Statistics (Year ending December)

Tourism Economic Contribution	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	AAG (2012-17) (% p.a.)	YOY change (2016-17) (%)
Gross Regional Product (GRP)								
Direct GRP (\$m)	184	198	181	165	199	212	2.8%	6.3%
Indirect GRP (\$m)	191	207	183	153	188	196	0.4%	4.3%
Total GRP (\$m)	376	405	364	318	387	407	1.6%	5.3%
Direct GRP (%)	21.6%	22.3%	19.9%	17.3%	20.4%	20.3%	-1.2%pt	-0.1%pt
Indirect GRP (%)	22.4%	23.2%	20.2%	16.1%	19.2%	18.8%	-3.6%pt	-0.5%pt
Total GRP (%)	44.0%	45.5%	40.2%	33.4%	39.7%	39.1%	-4.9%pt	-0.6%pt
Persons Employed								
Direct Employment (000s)	3.4	3.6	3.1	2.7	3.1	3.3	-0.3%	5.3%
Indirect Employment (000s)	1.0	1.1	1.0	0.8	1.0	1.1	1.2%	4.8%
Total Employment (000s)	4.4	4.8	4.1	3.5	4.2	4.4	0.0%	5.2%
Direct Employment (%)	33.7%	36.0%	30.3%	25.7%	29.3%	29.7%	-4.0%pt	0.4%pt
Indirect Employment (%)	10.2%	11.2%	9.8%	8.0%	9.7%	9.8%	-0.5%pt	0.1%pt
Total Employment (%)	43.9%	47.2%	40.1%	33.7%	39.0%	39.5%	-4.4%pt	0.4%pt

Years ending December Visitors, Nights and Expenditure	2013	2014	2015	2016	2017	2018	AAG (2013-18) (% p.a.)	YOY change (2017-18) (%)	2018 Share of Total
Domestic									
Daytrip visitors (000's)	1,429	1,180	1,237	1,316	1,396	1,229	-3.0%	-12.0%	55.9%
Overnight visitors (000's)	738	790	797	832	936	906	4.2%	-3.3%	41.2%
Total domestic visitors (000's)	2,167	1,970	2,034	2,148	2,333	2,134	-0.3%	-8.5%	97.2%
Visitor nights (000's)	2,255	2,335	2,214	2,598	2,733	2,343	0.8%	-14.3%	92.3%
Length of stay (nights)	3.1	3.0	2.8	3.1	2.9	2.6			
Daytrip Expenditure (\$m)	139	92	96	108	109	113	-4.0%	3.8%	23.9%
Daytrip spend per trip	97	78	78	82	78	92			
Domestic Overnight Expenditure (\$m)	247	271	264	319	358	338	6.5%	-5.6%	71.3%
Domestic Overnight Spend per Visitor (\$)	334	343	332	383	382	373			
Domestic Overnight Spend per Night (\$)	109	116	119	123	131	144			
Total Domestic Expenditure (\$m)	385	364	361	426	467	451	3.2%	-3.4%	95.2%
International									
Overnight visitors (000's)	31	33	45	43	52	62	14.9%	19.5%	2.8%
Visitor nights (000's)	-	-	-	-	-	-	-	-	-
Length of stay (nights)	-	-	-	-	-	-			
International Overnight Expenditure (\$m)	9	13	-	14	16	23	20.6%	46.4%	4.8%
International Overnight Spend per Visitor (\$)	290	390	-	335	301	369			
International Overnight Spend per Night (\$)	-	-	-	-	-	-			
TOTALS									
Visitors (000's)	2,198	2,004	2,080	2,191	2,385	2,196	0.0%	-7.9%	
Visitor nights (000's)	2,362	2,482	2,392	2,716	2,902	2,538	1.4%	-12.6%	
Expenditure (\$m)	394	377	379	441	483	474	3.8%	-1.8%	

Sources: National and International Visitor Survey, Regional Expenditure Model, December 2018, Tourism Research Australia.

Regional Tourism Satellite Account 2016-17, Tourism Research Australia

Note: Figures noted as '-' are under the publishable threshold.

AAG = Average Annual Growth. YOY = year-on-year growth

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¹Phillip Island Tourism Region definition – SA2s

Each tourism region is defined using smaller geographical building blocks called Statistical Areas Level 2 (SA2s), developed by the Australian Bureau of Statistics. SA2s do not precisely align with the boundaries of Local Government Areas (LGAs). For further information refer:

<http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/9503.0.55.0012016?OpenDocument>

The following SA2s are included in the Phillip Island tourism region:

Region	SA2
Phillip Island	French Island, Phillip Island, Wonthaggi - Inverloch

Regional Map

The Tourism, Events and Visitor Economy (TEVE) branch of the Victorian Government has developed a map noting Victoria's tourism sub-regions as defined by the Australian Bureau of Statistics. These definitions form the basis of data reported from the National Visitor Survey and the International Visitor Survey. This document also outlines SA2s and LGAs as they relate to the regions. Refer to:

<https://www.business.vic.gov.au/tourism-industry-resources/research/regional-visitation>

More Information

For the latest information on domestic visitation to Victoria's regions from the National Visitor Survey by Tourism Research Australia please refer to the results updated quarterly by TEVE at:

<http://www.business.vic.gov.au/tourism-industry-resources/research/domestic-and-regional-research>

Further information on international visitors to Victoria's regions from the International Visitor Survey by Tourism Research Australia is also updated quarterly by TEVE and available at:

<http://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on the methodology and key concepts for the Victorian Regional Tourism Satellite Accounts 2016-17, please refer to the Regional Tourism Satellite Account profiles at:

<https://www.business.vic.gov.au/tourism-industry-resources/research/economic-significance>

For more detail on the State Tourism Satellite Accounts 2016-17, published by Tourism Research Australia refer to the full report:

<https://www.tra.gov.au/research/view-all-publications/all-publications/economic-reports/state-tourism-satellite-accounts-2016-17>