

Mornington Peninsula

Regional Tourism Summary

Year Ending December 2018



Tourism is an important industry for the Mornington Peninsula. The region received approximately 7.4 million domestic (overnight and daytrip) and international overnight visitors combined, who spent \$1.1 billion in the year ending December 2018.



GROSS REGIONAL PRODUCT

GRP	% OF ECONOMY
\$849M ▲ 6.7%	8.1% ▲ 0.1%pts



TOURISM EMPLOYMENT

JOBS	% OF ECONOMY
9,000 ▲ 4.6%	8.6% ► 0.0%pt



DOMESTIC OVERNIGHT

SPEND	VISITORS
\$611M ▲ 18.9%	1.8M ▲ 8.7%



DOMESTIC DAYTRIPS

SPEND	DAYTRIPS
\$428M ▼ -3.6%	5.6M ▲ 8.5%



INTERNATIONAL OVERNIGHT

SPEND	VISITORS
\$59M ▼ -31.0%	61,000 ▼ -4.0%

VALUE OF TOURISM

In 2016-17, tourism was estimated to be worth \$849 million to the region's economy (in direct and indirect Gross Regional Product), representing 8.1 per cent of the region's economy.

Tourism generated employment of approximately 9,000 people or 8.6 per cent of the region's employment (direct and indirect jobs).

DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in the Mornington Peninsula in the year ending December 2018 was estimated to be \$611 million (+18.9 per cent year-on-year), with visitors spending an average of \$134 per night and \$346 per visitor.

DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$428 million in the year ending December 2018, a decrease of 3.6 per cent compared to the previous year.

INTERNATIONAL OVERNIGHT SPEND

International overnight expenditure in the Mornington Peninsula was estimated to be \$59 million in the year ending December 2018, a decrease of 31.0 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)	312	317	314	359	402	435	6.9%	8.1%
Indirect GRP (\$m)	321	322	322	353	393	413	5.2%	5.1%
Total GRP (\$m)	633	639	636	713	796	849	6.0%	6.7%
Direct GRP (%)	3.6%	3.6%	3.4%	3.7%	4.1%	4.2%	0.5%pt	0.1%pt
Indirect GRP (%)	3.7%	3.6%	3.5%	3.7%	4.0%	4.0%	0.2%pt	0.0%pt
Total GRP (%)	7.4%	7.2%	7.0%	7.4%	8.0%	8.1%	0.7%pt	0.1%pt
Persons Employed								
Direct Employment (000s)	5.6	5.6	5.4	6.0	6.4	6.7	3.5%	4.4%
Indirect Employment (000s)	1.8	1.8	1.8	2.0	2.2	2.4	6.0%	5.3%
Total Employment (000s)	7.4	7.4	7.2	8.0	8.6	9.0	4.1%	4.6%
Direct Employment (%)	5.9%	5.9%	5.6%	6.1%	6.3%	6.3%	0.4%pt	0.0%pt
Indirect Employment (%)	1.9%	1.9%	1.9%	2.0%	2.2%	2.2%	0.4%pt	0.0%pt
Total Employment (%)	7.8%	7.8%	7.5%	8.1%	8.5%	8.6%	0.8%pt	0.0%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)	3,589	4,020	4,256	4,552	5,168	5,610	9.3%	8.5%	75.4%
Overnight visitors (000's)	1,298	1,251	1,302	1,375	1,626	1,768	6.4%	8.7%	23.8%
Total domestic visitors (000's)	4,887	5,272	5,558	5,927	6,795	7,378	8.6%	8.6%	99.2%
Visitor nights (000's)	4,045	3,784	3,757	4,148	4,689	4,549	2.4%	-3.0%	84.0%
Length of stay (nights)	3.1	3.0	2.9	3.0	2.9	2.6			
Daytrip Expenditure (\$m)	240	313	353	357	444	428	12.3%	-3.6%	39.0%
Daytrip spend per trip	67	78	83	78	86	76			
Domestic Overnight Expenditure (\$m)	394	393	447	445	514	611	9.2%	18.9%	55.6%
Domestic Overnight Spend per Visitor (\$)	304	314	343	324	316	346			
Domestic Overnight Spend per Night (\$)	97	104	119	107	110	134			
Total Domestic Expenditure (\$m)	634	706	800	803	959	1,040	10.4%	8.5%	94.6%
International									
Overnight visitors (000's)	40	44	56	57	64	61	8.9%	-4.0%	0.8%
Visitor nights (000's)	584	688	775	932	1,128	869	8.3%	-22.9%	16.0%
Length of stay (nights)	14.6	15.5	13.7	16.3	17.7	14.2			
International Overnight Expenditure (\$m)	26	40	51	56	86	59	18.5%	-31.0%	5.4%
International Overnight Spend per Visitor (\$)	639	901	896	973	1,353	973			
International Overnight Spend per Night (\$)	44	58	65	60	76	68			
TOTALS									
Visitors (000's)	4,927	5,316	5,614	5,984	6,858	7,439	8.6%	8.5%	
Visitor nights (000's)	4,630	4,472	4,532	5,080	5,817	5,418	3.2%	-6.9%	
Expenditure (\$m)	660	746	850	858	1,045	1,099	10.8%	5.2%	

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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¹ Mornington Peninsula 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 Mornington Peninsula tourism region:

Region	SA2
Mornington Peninsula	Carrum Downs, Dromana, Flinders, Frankston, Frankston North, Frankston South, Hastings, Somers, Langwarrin, Mornington, Mount Eliza, Mount Martha, Point Nepean, Rosebud – McCrae, Seaford, Skye – Sandhurst, Somerville.

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>