



GEELONG OTWAY REGION DOMESTIC VISITATION 2001¹

The following report summarises domestic visitation to the Geelong Otway Region, based on the National Visitor Survey 2001. Comparisons are made with the previous year's performance as appropriate.

OVERNIGHT VISITORS

Market Overview

In 2001, the Geelong Otway region attracted just under 1.9 million domestic overnight visitors (Table 1.1). The region experienced a -2% decline in overnight visitors and a -1% decline in visitor nights, indicating that while there are fewer visitors, those fewer visitors are spending slightly more nights in the region.

The decline in visitation was most significant in November and December 2001 (see Figure 1.3), which may in part be attributed to the demise of Ansett Airlines and the flow-on effects of the terrorist attacks in the USA. These results are consistent with the Australian Bureau of Statistics Survey of Tourism Accommodation properties with 15 or more rooms. During the same period the region experienced a 0.9% decline in visitor arrivals to the surveyed properties. At the same time, the region netted greater yield from those visitors with a 10.8% increase in takings from accommodation.

Sixty nine percent of domestic overnight visitors travelled to the region for a holiday (up from 63% in 2000), 23% to visit a friend or relative (down from 27%), and 4% for business/conference purposes (down from 9%). These visitors spent on average 2.7 nights in the region, with the holiday visitors spending the longest with 3.1 nights (Table 1.3).

Table 1.1 Domestic Overnight Visitors to the Geelong Otway Region 2001

	2000	2001	% change
Domestic Overnight Visitors	1,932,00	1,896,000	-2.0
Domestic Visitor Nights	5,250	5,175,000	-1.0
Average length of stay	2.72	2.73	-

Source: National Visitor Survey 2001

¹ The results given in the National Visitor Survey are based on a sample rather than a census of Australian residents. As with all sample surveys, the results are subject to sampling variability, that is, they may differ from figures that would have been obtained if the entire Australian population had been included in the survey.

The majority of domestic overnight visitors and visitor nights were captured by the City of Greater Geelong area (52% and 48% respectively). Table 1.2 highlights the distribution of overnight visitors and visitor nights throughout the region. Surfcoast received 33% of all visitors and 36% of all visitor nights, revealing the attractiveness of this area for overnight stays.

Within the region the majority of visitors to Surfcoast and Colac Otway came for a holiday (74% and 71% respectively). Visiting Friends and Relatives had a larger impact on reasons to visit the City of Greater Geelong (41%) while 46% came for a holiday.

Table 1.2 Distribution of Domestic Overnight Visitors in the Geelong Otway Region 2001

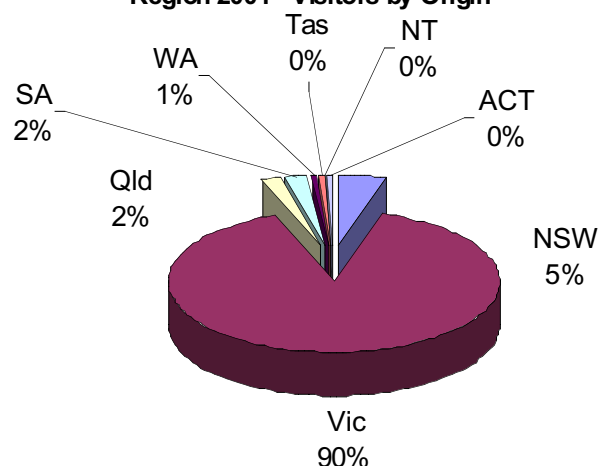
	Visitors (000s)	Visitor Nights
City of Greater Geelong	978	2,480
Surfcoast Shire	629	1,854
Colac Otway Shire	304	824
Total ²	1,911	5,158

Source: National Visitor Survey 2001

Source Markets

In 2001, the majority (90%) of all domestic overnight visitors to the Geelong Otway region were from Victoria. Of these Victoria visitors, the vast majority (75%) came from Melbourne. The continued importance of and reliance on the Victorian market is highlighted (Figure 1.1). New South Wales continues to be the largest of the interstate markets, accounting for 5% of all domestic overnight visitors. The number of visitors from Queensland, WA, ACT and NT all increased, while numbers from NSW, SA and Tasmania decreased.

Figure 1.1 Overnight Domestic Visitors to Geelong Otway Region 2001 - Visitors by Origin



² Total of sub-regions does not equate to total visitors to the region due to different weightings applied by Bureau of Tourism Research

Table 1.3 Domestic Overnight Visitors to the Geelong Otway Region by Origin 2000-2001

	2000 ('000)	2001 ('000)	% Change
VIC	1,732	1,696	-2.0
NSW	94	92	-2.0
SA	56	43	-23.0
QLD	24	35	46.0
TAS	13	9	-31.0
ACT	6	8	33.0
WA	6	10	67.0
NT	2	3	50.0
TOTAL	1,932.7	1,896	-2.0

Source: National Visitor Survey 2001

Length of Stay

In 2001, domestic overnight visitors to the region stayed on average 2.7 nights in the region (Table 1.4). While the average length of stay has remained the same since 2000, the length of stay of holiday/leisure visitors has increased from 2.9 nights to 3.1 nights, at the same time as the length of stay of VFR, Business and Other visitors has declined slightly.

The majority (58%) of visitors stay 1-2 nights. However, from 2000 there has been some shifting between one night to longer stays. The number of visitors staying one night has decreased from 37% to 28%. At the same time visitors staying 3 nights rose from 13% to 15%, visitors staying 4-7 nights rose from 16% to 17% and visitor staying 8-14 nights rose from 3% to 6%).

The results reflect that while a popular destination, a number of visitors are choosing to stay longer.

Figure 1.2 Length of Stay by Domestic Overnight Visitors in the Geelong Otway Region 2001

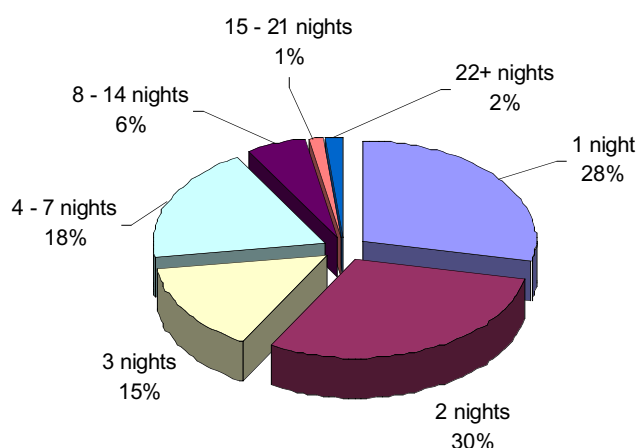


Table 1.4 Length of Stay in the Geelong Otway Region by Purpose of Visit 2001

Purpose of Visit	Visitor nights ('000)	Visitors ('000)	Average Length of Stay
Holidays and Leisure	3,560	1,160	3.1
Visiting Friends & Relatives	1,183	551	2.1
Business	217	94	2.3
Other	214	91	2.3
Total	5,175	1,896	2.7

Note: Visitor nights includes travellers who had more than 21 stops where regional specific data was not asked

Source: National Visitor Survey 2001

Expenditure

The region has experienced a marked increase in visitor expenditure between the last recorded expenditure results, 1998 and 2001. The previous data relates to the Great Ocean Road region, a far greater area than the Geelong Otway region. Therefore, the 1998 figure for the Geelong Otway region would be expected to be smaller and the increase between 1998 and 2001 even greater.

Table 1.5 Domestic Overnight Visitors Expenditure in the Geelong Otway Region 2001

	1998 ³	2001	% change
Total Expenditure	525m	707m	35% approx
Average Expenditure per Visitor	\$192.38	\$372.94	94% approx
Average Expenditure per Visitor Night	\$71.08	\$136.64	92% approx

Table 1.6 Top Ten Expenditure Items by Domestic Overnight Visitors in the Geelong Otway Region 2001

	2001	
	Rank	%
Accommodation (can include food)	1	24
Takeaways & restaurant meals	2	19
Fuel	3	12
Shopping, gifts, souvenirs	4	12
Groceries for self-catering	5	9
Alcohol, drinks (not already reported)	6	6
Airfares	7	4
Entertainment, museums, movies	8	3
Other	9	2
Package tours	10	2

Source: National Visitor Survey 2001

³ 1998 data for Great Ocean Road region only, encompassing Geelong Otway region plus Warrnambool, Moyne, Glenelg, Corangamite and Golden Plains.

Accommodation, meals, fuel and shopping were the key items visitors spent their money on while visiting the region. Distribution of spend within the region can be summarised by Table 1.7.

Table 1.7 Distribution of Expenditure by Domestic Overnight Visitors in the Geelong Otway Region 2001

	2001	
	Expenditure	%
City of Greater Geelong	\$321.6m	45
Surfcoast Shire	\$217.9m	31
Colac Otway Shire	\$199.3m	28

Source: National Visitor Survey 2001

Accommodation Used by Domestic Overnight Visitors

Over one third of all domestic overnight visitors to the region in 2001 stayed with friends or relatives (Table 1.8). This is consistent with the proportion of VFR visitors to the region (23%). Visitors' own property, followed by caravan and commercial camping were the next most popular forms of accommodation.

Table 1.8 Accommodation Used by Domestic Overnight Visitors

	2001	
	Visitor Nights ('000)	%
Hotel, Resort, Motel, Motor Inn	539	10%
Guest house/B&B/ Self-catering cottage/apartment	702	14%
Caravan park or commercial camping ground	803	16%
Friends or relatives property	1908	37%
Own property (e.g. holiday house)	940	18%
Other	283	5%
Total	5,175	100

Source: National Visitor Survey 2001

Activities Undertaken⁴

Over half of all domestic overnight visitors (54%) participated in beach activities during their stay in the Geelong Otway region. Together with eating out/restaurants (52%), these remain the top two activities for visitors. Furthermore, eating out has increased in popularity as an activity of overnight visitors. Other popular activities included sightseeing (40%), and visiting friends and relatives (37%) as shown in Table 1.9. The increase in popularity of sightseeing between 2000 and 2001 can in part be attributed to Waterfront Geelong, which encourages promenading and sightseeing by visitors.

Although there continues to be a dominance in activities that are no or minimal expense to the overnight visitor, the increased popularity of eating out by visitors will assist in growing the yield from the overnight visitor.

Table 1.9 Top Ten Activities Undertaken by Domestic Overnight Visitors in the Geelong Otway Region (No. of visitors) 2000-2001

	2000		2001	
	Rank	%	Rank	%
Go to the beach (incl swimming, surfing, diving)	1	55	1	54
Eat out/restaurants	2	37	2	52
Walking around/sightseeing	4	26	3	40
Visit friends & relatives	3	34	4	37
Go shopping (pleasure)	6	21	5	24
Pubs, clubs, discos etc	5	23	6	23
Visit national parks/state parks/bushwalking	7	10	7	14
Go on a daytrip to another place	9	8	8	10
Picnics/BBQs	8	9	9	9
Other outdoor activities	-	-	10	7

Source: National Visitor Survey 2001

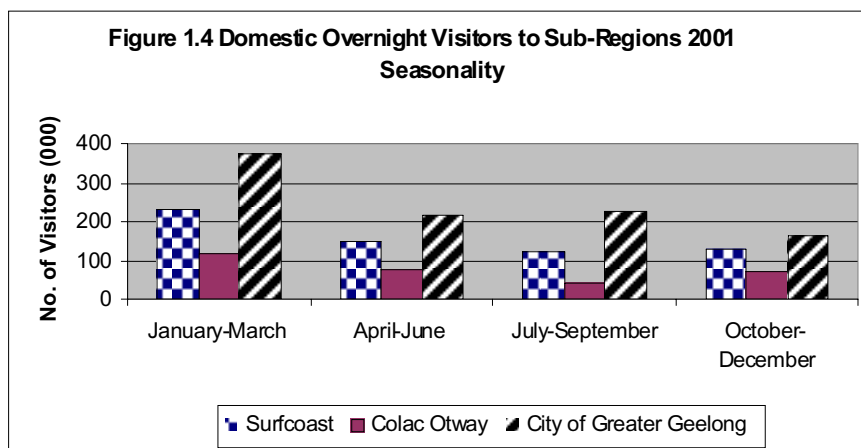
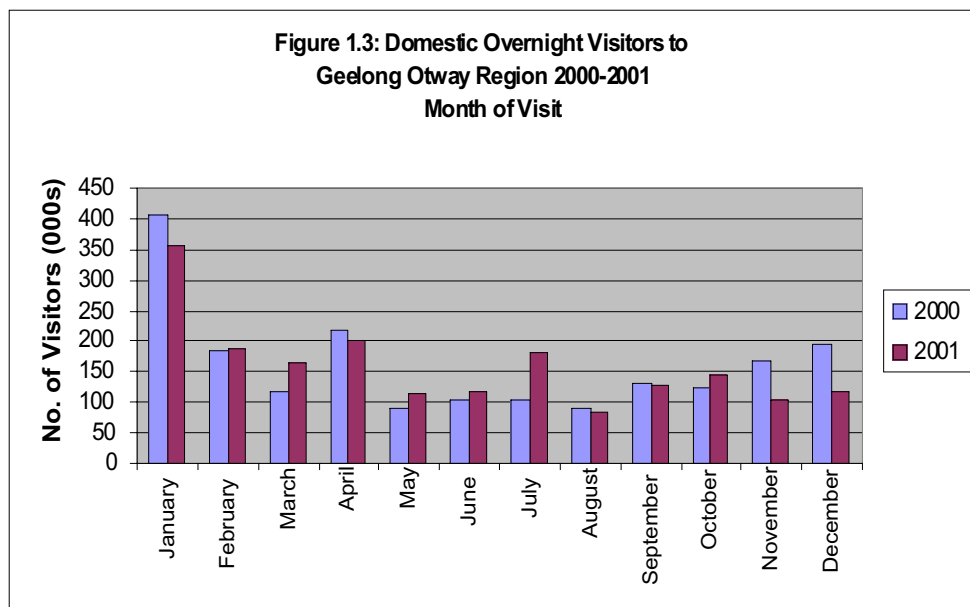
⁴ Please Note: Activities are not asked on a regional basis, and so the activities MAY not have occurred in this region. If someone is on a trip around Australia, and PLAYS GOLF, it may have occurred in WA but because they ALSO went to Geelong Otway region, it turns up here

Seasonality

While the region continues to be an attractive summer destination, particularly during school holidays, the region experienced reduced seasonality with a smoothing of the summer season peaks and more visitors visiting in the off-peak period. This change is consistent with GOT's strategies for reducing seasonality.

The marked decline in visitation during November and December, typically popular months, as noted above may in part be attributed to the demise of Ansett Airlines, the flow-on effects of the terrorist attacks in the USA and also strong domestic marketing promotion encouraging travel to other parts of Australia. The increase in October may reflect travel already planned at the time of September 11th.

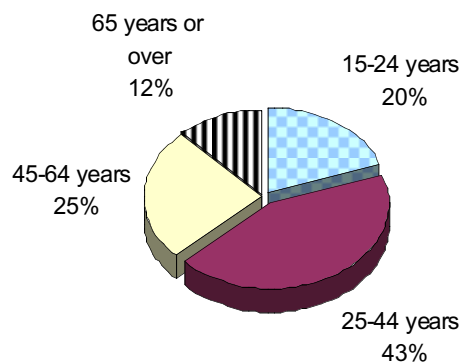
Visitation to the Surfcoast and Colac Otway follows the same seasonal trends as for the region as a whole. The City of Greater Geelong experienced some variation from the trend with strong visitation through the off peak quarters as revealed by Figure 1.4



Demographic Profile

Demographic profile data for domestic overnight visitors to the Geelong Otway region is limited to age groupings. Currently the typical domestic overnight visitor to the region tends to be dominated by the 25 to 44 years of age (43%), followed by visitors aged 45-64 years (25%) and visitors aged 15-24 years (20%). There has been little change from the previous year.

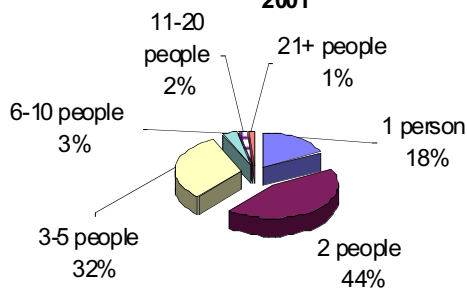
Figure 1.5 Domestic Overnight Visitor Age Groups Geelong Otway Region



Travel Party

The majority of visitors to the region travel with one or more other people, the largest number travelling in twos.

Figure 1.6: Travel Party to Geelong Otway Region 2001



Day Trip Visitors

Day Trip Market Overview

There were just over 4 million day trips to the Geelong Otway region during 2001 (Table 1.10). This represents a decrease of 16% from 2000, which may reflect in part the move to overnight stays, the impacts on the industry in 2001 and the works to the Geelong Road.

Table 1.10 Domestic Day Trip Visitors to the Geelong Otway Region

	2000	2001	% Change
Day Trip Visitors	4,803,830	4,049,000	-16.0

Source: National Visitor Survey 2001

Of the total day trip visitors to the region in 2001, 66% visited the City of Greater Geelong, 23% the Surfcoast and 11% the Colac Otway. Table 1.11 highlights the regional distribution of visitors to the sub-regions.

Table 1.11 Distribution of Domestic Day Trip Visitors in the Geelong Otway Region 2001

	Visitors (000s)	%
City of Greater Geelong	2,673	66
Surfcoast Shire	936	23
Colac Otway Shire	443	11
Total ⁵	4,052	100

Source: National Visitor Survey 2001

Source Markets

Victoria is the only identified origin of domestic day visitors to the region. Of the Victorian visitors, 69% were from Melbourne. There has been little change from the previous year.

⁵ Total of sub-regions does not equate to total visitors to the region due to different weightings applied by Bureau of Tourism Research to overcome sample error of sub-region data applied by Bureau of Tourism Research.

Purpose of Visit

The majority of domestic day trip visitors to the Geelong Otway region, 58% came to the region for holiday/leisure purposes (Table 1.12). The relative proportion of holiday/leisure visitors is lower for day trip visitors compared with overnight visitors (69%), as a large number of day trip visitors come to the region to visit friends and relatives (30%).

Table 1.12 Purpose of Visit by Domestic Day Trip Visitors to the Geelong Otway Region 2001

Purpose of Visit	Visitors 2000 ('000)	Visitors 2001 ('000)	% Change
Holidays and Leisure	2,773	2,346	-15.0
Visit Friends & Relatives	1,404	1,214	-14.0
Business	329	318	-3.0
Other	298	170	-43.0
Total	4,803	4,049	-16.0

Holiday/leisure was the dominant purpose of visitors to Surfcoast (81%) and Colac Otway (55%). Similarly to the overnight visitors, the City of Greater Geelong was the most popular destination for visiting friends and relatives. Thirty-seven percent travelled to the City of Greater Geelong to visit friends and relatives and 49% for holiday/leisure.

Expenditure

As noted above in terms of domestic overnight visitors, the only data to compare the 2001 expenditure in the Geelong Otway region against is expenditure in the much larger Great Ocean Road region in 1998. Because of the difference in size of the two areas it is not possible to identify a trend in day visitor expenditure in the Geelong Otway region. What is revealed however, is that average expenditure per trip by visitors to the Geelong Otway region is less than for visitors to the Great Ocean Road.

Table 1.13 Expenditure by Domestic Day Trip Visitors to the Geelong Otway Region 2001

	1998 ⁶ Great Ocean Road	2001 Geelong Otway
Total Expenditure	\$358m	\$241.6m
Average Expenditure per Day Trip	\$66.10	\$59.67

⁶ 1998 data for Great Ocean Road region only, encompassing Geelong Otway region plus Warrnambool, Moyne, Glenelg, Corangamite and Golden Plains.

The most popular items visitors spent their money on were fuel, reflecting the dominance of motor vehicle transport, followed by meals and shopping. The results were similar to the overnight visitor expenditure.

Table 1.14 Top Ten Expenditure Items by Domestic Day Trip Visitors in the Geelong Otway Region 2001

	2001	
	Rank	%
Fuel	1	30
Takeaways & restaurant meals	2	27
Shopping, gifts, souvenirs	3	21
Groceries for self-catering	4	6
Alcohol, drinks (not already reported)	5	5
Other	6	4
Entertainment, museums, movies	7	3
Package tours	8	1
Other long distance transport costs	9	1
Horse racing, gambling, casinos	10	1

Source: National Visitor Survey 2001

In terms of the spread of visitor expenditure across the sub-regions, the majority of visitor expenditure by day visitors is captured by the City of Greater Geelong.

Table 1.15 Distribution of Expenditure by Domestic Day Trip Visitors in the Geelong Otway Region 2001

	2001	
	Expenditure	%
City of Greater Geelong	\$151.8m	63
Surfcoast Shire	\$61.6m	25
Colac Otway Shire	\$26m	11

Source: National Visitor Survey 2001

Activities undertaken by Day Trip Visitors

As shown in Table 1.16, there was a shift in the popularity of major activities undertaken on a day trip to the region in 2001. Going to the beach (29%), was superseded by eating out/restaurants (44%), and walking around/sightseeing (30%).

As a key item of expenditure, enjoying restaurant/café meals is increasingly an important activity for day trip visitors. This reflects both a greater awareness of and an increase in the range and quality of eating establishments in the region.

Table 1.16 Top Ten Activities Undertaken by Domestic Day Trip Visitors in the Geelong Otway Region 2001

	2000		2001	
	Rank	%	Rank	%
Eat out/restaurants	2	37	1	44
Just walk around/taking in the sights/general sightseeing	4	23	2	30
Go to the beach (incl swimming, surfing, diving)	1	39	3	29
Visit friends & relatives	3	29	4	29
Go shopping (pleasure)	5	17	5	12
Other activities	-	-	6	11
Pubs, clubs, discos etc	6	7	7	7
Picnics/BBQs	7	5	8	7
Play other sports	-	-	9	4
Go fishing	-	-	10	4

Source: National Visitor Survey 2001

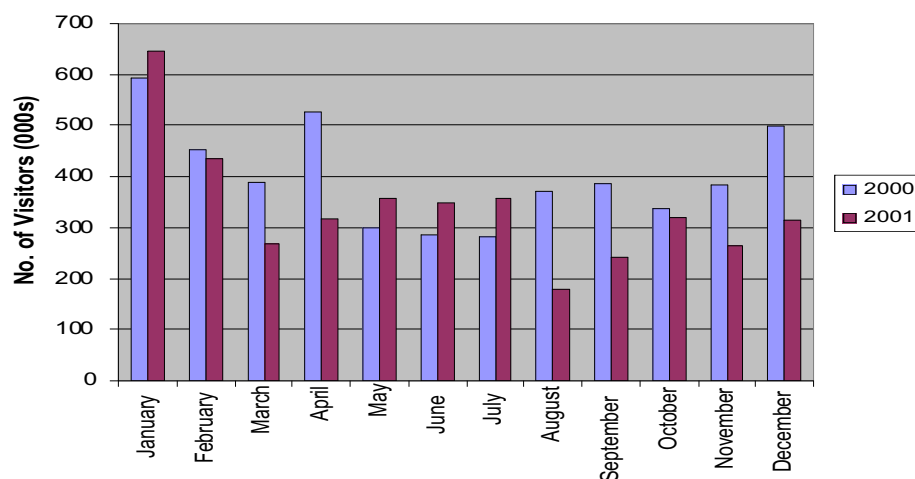
Seasonality

In 2001, the highest day trip visitation to the Geelong Otway region was during the summer months of January to March (Table 1.17). However, day trip visitation to the region is becoming more evenly distributed throughout the year, with an increase in the proportion visiting the shoulder period April-June. Similarly to overnight visitors, there was a decline in proportion of day trip visitors in October-December.

Table 1.17 Quarter of Visit for Domestic Day Trip Visitors to the Geelong Otway region.

Quarter	2000		2001	
	Visitors (000)	%	Visitors (000)	%
Jan to March	1,433	30	1,349	33
April to June	1,114	23	1,022	25
July to Sept	1,038	22	777	20
Oct to Dec	1,218	25	900	22
Total	4,803	100	4,049	100

Figure 1.7 Domestic Day Trip Visitors to Geelong Otway Region 2001
Month of Visit

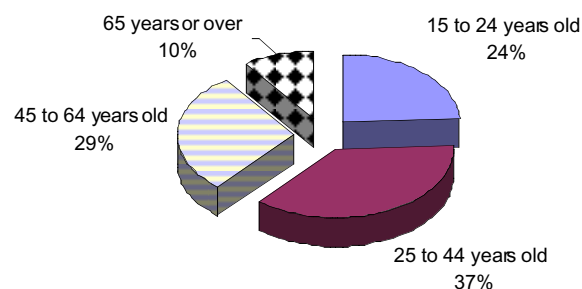


Source: National Visitor Survey 2001

Demographic Profile

Demographic profile data for domestic day trip visitors to the Geelong Otway Region is limited to age groupings. Currently the typical domestic day trip visitor to the region tends to be dominated by the 25 to 44 years of age (37%). There is a relatively even spread of visitors aged 45-64 years of age (29%) and those aged 15-24 years (24%). There is a higher representation of younger visitors (15-24 years) in the day trip market relative to overnight visitors.

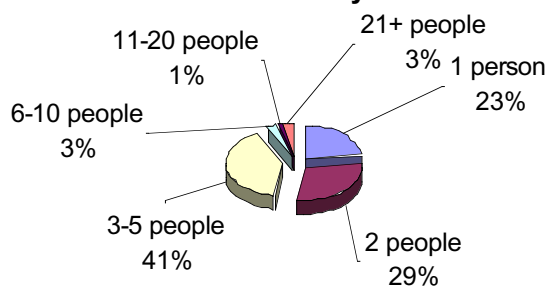
Figure 1.8 Domestic Day Trip Visitor Age Groups 2000
Geelong Otway Region



Travel Party

Similarly to domestic overnight visitors, the majority of visitors travel either as a couple or family size group.

Figure 1.8 Domestic Day Trip Visitors 2001
Travel Party



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