

Mornington Peninsula

Regional Tourism Summary

Year Ending December 2021



The visitor economy has suffered immense losses since the start of the COVID-19 pandemic, with large declines recorded across most top-level measures compared to the pre-pandemic results. However, early signs of recovery are evident as restrictions have been progressively lifted and some measures have improved relative to the performance of 2020 during a period of limited travel.

Tourism is an important industry for the Mornington Peninsula. The region received approximately 5.4 million domestic (overnight and daytrip) visitors, who spent \$1.0 billion in the year ending December 2021.

GROSS REGIONAL PRODUCT



GRP	% OF ECONOMY
\$888M ▼-22% y/y	7.1% ▼ -2.2%pts

VALUE OF TOURISM

In 2019-20, tourism was estimated to be worth \$888 million to the region's economy (in direct and indirect Gross Regional Product), representing 7.1 per cent of the region's economy.

TOURISM EMPLOYMENT



JOBS	% OF ECONOMY
10,900 ▼-11% y/y	9.2% ▼ -1.2%pts

Tourism generated employment of approximately 10,900 people or 9.2 per cent of the region's employment (direct and indirect jobs).

DOMESTIC OVERNIGHT



SPEND	VISITORS
\$689M +51% y/y	1.6M +26% y/y
▼ -13% 2019/21	▼ -23% 2019/21

DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in the Mornington Peninsula in the year ending December 2021 was estimated to be \$689 million, up 51 per cent on 2020 during a period of low activity. However, overnight spend remained 13 per cent below the year ending December 2019 (pre-COVID) result. Visitors spent an average of \$139 per night and \$430 per visitor in 2021.

DOMESTIC DAYTRIPS



SPEND	DAYTRIPS
\$323M +28% y/y	3.8M +14% y/y
▼ -36% 2019/21	▼ -41% 2019/21

DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$323 million in the year ending December 2021, a decrease of 36 per cent compared to the year ending December 2019. However daytrip spend was up 28 per cent on 2020 during a period of low activity.

Growth rates for Gross Regional Product and Employment are year-on-year percentage changes for 2019-20 vs 2018-19. International visitor data is currently limited to state-level results.

Sources: National and International Visitor Surveys and Regional Expenditure Model December 2021, Tourism Research Australia (TRA), released March 2022.

Regional Tourism Satellite Account 2019-20, TRA, released July 2021.

Data correct at time of publishing. Factsheet published by the Tourism and Events Strategy and Reform (TESR) Research Unit, March 2022

Image: Montalto Vineyard and Olive Grove



Jobs,
Precincts
and Regions

Mornington Peninsula

Key Regional Tourism Statistics

Tourism Economic Contribution	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	YOY change (2019-20) (%)
Gross Regional Product (GRP)							
Direct GRP (\$m)	392	430	467	537	592	475	-20%
Indirect GRP (\$m)	365	402	434	512	540	413	-24%
Total GRP (\$m)	758	831	901	1,049	1,132	888	-22%
Direct GRP (%)	3.9%	4.2%	4.3%	4.7%	4.9%	3.8%	-1.1%pts
Indirect GRP (%)	3.7%	3.9%	4.0%	4.5%	4.4%	3.3%	-1.1%pts
Total GRP (%)	7.6%	8.1%	8.3%	9.1%	9.3%	7.1%	-2.2%pts
Persons Employed							
Direct Employment (000s)	6.7	7.2	7.8	8.8	9.1	8.4	-7%
Indirect Employment (000s)	2.1	2.3	2.5	2.9	3.1	2.5	-22%
Total Employment (000s)	8.8	9.5	10.3	11.8	12.2	10.9	-11%
Direct Employment (%)	6.5%	6.8%	7.0%	7.8%	7.7%	7.1%	-0.6%pts
Indirect Employment (%)	2.0%	2.2%	2.2%	2.6%	2.7%	2.1%	-0.6%pts
Total Employment (%)	8.5%	8.9%	9.3%	10.3%	10.4%	9.2%	-1.2%pts

Visitors, Nights and Expenditure	YE Dec 2016	YE Dec 2017	YE Dec 2018	YE Dec 2019	YE Dec 2020	YE Dec 2021	YOY change (YE Dec 2020-21) (%)	2 year change (YE Dec 2019-21) (%)	YE Dec 2021 Share Total
Domestic									
Daytrip visitors (000's)	4,552	5,363	5,921	6,363	3,312	3,769	14%	-41%	70.2%
Overnight visitors (000's)	1,375	1,680	1,818	2,085	1,269	1,603	26%	-23%	29.8%
Total domestic visitors (000's)	5,927	7,043	7,739	8,448	4,581	5,372	17%	-36%	100.0%
Visitor nights (000's)	4,148	4,822	4,649	5,590	3,633	4,947	36%	-11%	100.0%
Length of stay (nights)	3.0	2.9	2.6	2.7	2.9	3.1			
Daytrip Expenditure (\$m)	357	460	452	508	252	323	28%	-36%	31.9%
Daytrip spend per trip	78	86	76	80	76	86			
Domestic Overnight Expenditure (\$m)	446	526	622	788	457	689	51%	-13%	68.1%
Domestic Overnight Spend per Visitor (\$)	324	313	342	378	360	430			
Domestic Overnight Spend per Night (\$)	107	109	134	141	126	139			
Total Domestic Expenditure (\$m)	803	986	1,074	1,296	709	1,012	43%	-22%	100.0%
International									
Overnight visitors (000's)	57	64	61	73	18	-	-	-	-
Visitor nights (000's)	932	1,128	869	1,146	260	-	-	-	-
Length of stay (nights)	16.3	17.7	14.2	15.7	14.2	-			
International Overnight Expenditure (\$m)	56	86	59	78	16	-	-	-	-
International Overnight Spend per Visitor (\$)	973	1,353	972	1,072	881	-			
International Overnight Spend per Night (\$)	60	76	68	68	62	-			

Note: For year ending December 2021, international visitor data is currently limited to state-level results.

Sources: National and International Visitor Surveys and Regional Expenditure Model, December 2021, TRA, released March 2022.

Regional Tourism Satellite Account 2019-20, TRA, released July 2021.

Improvements in the NVS methodology has resulted in a break in series. Please use caution when comparing 2020 and 2021 results with previous time periods and releases.

For further information on methodology changes and impacts refer to the TRA NVS Methodology.

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

Factsheet published by the TESR Research Unit, March 2022



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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:

[https://www.abs.gov.au/websitedbs/D3310114.nsf/home/Australian+Statistical+Geography+Standard+\(ASGS\)](https://www.abs.gov.au/websitedbs/D3310114.nsf/home/Australian+Statistical+Geography+Standard+(ASGS))

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 managed by Tourism Research Australia. 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 further information on National Visitor Survey methodology changes and impacts refer to the Tourism Research Australia NVS Methodology.

<https://www.tra.gov.au/Domestic/national-visitor-survey-methodology>

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>

Refer to the [TRA website](#) for information on how estimates for international visitors have been produced in the absence of survey data since the June 2020 quarter.

For further information on the methodology and key concepts for the Regional Tourism Satellite Accounts 2019-20, please refer to:

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

For more detail on the State Tourism Satellite Accounts 2019-20, published by Tourism Research Australia refer to the full report:

<https://www.tra.gov.au/economic-analysis/economic-value/state-tourism-satellite-account/state-tourism-satellite-account>

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for use of this information.