

# Goldfields

## 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 Goldfields tourism region. The region received approximately 5.1 million domestic (overnight and daytrip) visitors, who spent an estimated \$1.1 billion in the year ending December 2021.

The Goldfields tourism region comprises two tourism sub-regions: Ballarat and Bendigo Loddon.<sup>1</sup>

### GROSS REGIONAL PRODUCT



GRP	% OF ECONOMY
\$756M ▼-27% y/y	4.9% ▼ -2.1%pts

### TOURISM EMPLOYMENT



JOBS	% OF ECONOMY
9,400 ▼-17% y/y	6.9% ▼ -1.5%pts

### DOMESTIC OVERNIGHT



SPEND	VISITORS
\$623M +107% y/y	1.6M +52% y/y
▼ -8% 2019/21	▼ -30% 2019/21

### DOMESTIC DAYTRIPS



SPEND	DAYTRIPS
\$430M +8% y/y	3.5M +25% y/y
▼ -33% 2019 / 21	▼ -40% 2019 / 21

### VALUE OF TOURISM

In 2019-20, tourism was estimated to be worth \$756 million to the region's economy in direct and indirect Gross Regional Product or 4.9 per cent of the region's economy.

Tourism generated employment of approximately 9,400 people or 6.9 per cent of the region's employment (direct and indirect jobs).

### DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Goldfields in the year ending December 2021 was estimated to be \$623 million, up 107 per cent on 2020 during a period of low activity. However, overnight spend remained 8 per cent below the year ending December 2019 (pre-COVID-19) result. Visitors spent an average of \$163 per night and \$392 per visitor in 2021.

### DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$430 million in the year ending December 2021, representing a decrease of 33 per cent compared to the year ending December 2019. However, daytrip spend was up 8 per cent on 2020 during a period of low travel 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 2020.

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

Image: Bendigo Art Gallery



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# Goldfields

## Key Regional Tourism Statistics

Tourism Economic Contribution	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	YOY change (2019-20) (%)
<b>Gross Regional Product (GRP)</b>							
Direct GRP (\$m)	392	383	455	457	523	394	-25%
Indirect GRP (\$m)	394	377	455	455	511	362	-29%
<b>Total GRP (\$m)</b>	<b>786</b>	<b>760</b>	<b>911</b>	<b>912</b>	<b>1,034</b>	<b>756</b>	<b>-27%</b>
Direct GRP (%)	3.2%	3.0%	3.4%	3.2%	3.5%	2.5%	-1.0%pts
Indirect GRP (%)	3.2%	3.0%	3.4%	3.2%	3.4%	2.3%	-1.1%pts
<b>Total GRP (%)</b>	<b>6.4%</b>	<b>6.0%</b>	<b>6.8%</b>	<b>6.4%</b>	<b>7.0%</b>	<b>4.9%</b>	<b>-2.1%pts</b>
<b>Persons Employed</b>							
Direct Employment (000s)	6.9	6.6	7.8	7.7	8.4	7.3	-13%
Indirect Employment (000s)	2.2	2.2	2.6	2.6	3.0	2.1	-28%
<b>Total Employment (000s)</b>	<b>9.1</b>	<b>8.7</b>	<b>10.4</b>	<b>10.3</b>	<b>11.3</b>	<b>9.4</b>	<b>-17%</b>
Direct Employment (%)	5.7%	5.3%	6.1%	5.8%	6.2%	5.3%	-0.9%pts
Indirect Employment (%)	1.9%	1.8%	2.0%	2.0%	2.2%	1.6%	-0.6%pts
<b>Total Employment (%)</b>	<b>7.6%</b>	<b>7.1%</b>	<b>8.1%</b>	<b>7.8%</b>	<b>8.4%</b>	<b>6.9%</b>	<b>-1.5%pts</b>

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
<b>Domestic</b>									
Daytrip visitors (000's)	4,425	4,739	5,194	5,796	2,811	3,500	25%	-40%	68.8%
Overnight visitors (000's)	1,695	1,852	1,866	2,281	1,050	1,590	52%	-30%	31.2%
<b>Total domestic visitors (000's)</b>	<b>6,121</b>	<b>6,591</b>	<b>7,060</b>	<b>8,077</b>	<b>3,861</b>	<b>5,090</b>	<b>32%</b>	<b>-37%</b>	<b>100.0%</b>
Visitor nights (000's)	3,876	4,410	4,036	4,770	3,228	3,826	19%	-20%	100.0%
Length of stay (nights)	2.3	2.4	2.2	2.1	3.1	2.4			
Daytrip Expenditure (\$m)	461	497	499	646	399	430	8%	-33%	40.8%
Daytrip spend per trip	104	105	96	111	142	123			
Domestic Overnight Expenditure (\$m)	474	547	588	677	301	623	107%	-8%	59.2%
Domestic Overnight Spend per Visitor (\$)	280	295	315	297	287	392			
Domestic Overnight Spend per Night (\$)	122	124	146	142	93	163			
<b>Total Domestic Expenditure (\$m)</b>	<b>935</b>	<b>1,043</b>	<b>1,088</b>	<b>1,323</b>	<b>701</b>	<b>1,053</b>	<b>50%</b>	<b>-20%</b>	<b>100.0%</b>
<b>International</b>									
Overnight visitors (000's)	49	43	49	56	8	-	-	-	-
Visitor nights (000's)	692	610	594	902	-	-	-	-	-
Length of stay (nights)	14.3	14.1	12.2	16.0	-	-			
International Overnight Expenditure (\$m)	-	39	45	51	-	-	-	-	-
International Overnight Spend per Visitor (\$)	-	908	929	914	-	-			
International Overnight Spend per Night (\$)	-	64	76	57	-	-			

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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# Goldfields

## <sup>1</sup> Goldfields 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 Goldfields Tourism Region:

Region	SA2
Ballarat	Alfredton, Ballarat, Ballarat – North, Ballarat – South, Buninyong, Delacombe, Golden Plains – North, Smythes Creek, Wendouree - Miners Rest, Avoca, Beaufort
Bendigo-Loddon	Bendigo, Bendigo Region – North, Bendigo Region – South, Castlemaine, Castlemaine Region, California Gully – Eaglehawk, East Bendigo – Kennington, Flora Hill - Spring Gully, Heathcote, Kangaroo Flat - Golden Square, Loddon, Maiden Gully, Maryborough, Maryborough Region, Strathfieldsaye, White Hills – Ascot

## 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. Please 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.