

Geelong and the Bellarine

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 Geelong and the Bellarine¹. The region received approximately 3.8 million domestic (overnight and daytrip) visitors, who spent an estimated \$729 million in the year ending December 2021.



GROSS REGIONAL PRODUCT

GRP	% OF ECONOMY
\$765M ▼-18% y/y	5.3% ▼ -1.3%pts

VALUE OF TOURISM

In 2019–20, tourism was estimated to be worth \$765 million to the region's economy in direct and indirect Gross Regional Product or 5.3 per cent of the region's economy.



TOURISM EMPLOYMENT

JOBS	% OF ECONOMY
9,100 ▼ -7% y/y	7.2% ▼ -0.6%pts

Tourism generated employment of approximately 9,100 people or 7.2 per cent of the region's employment (direct and indirect jobs).



DOMESTIC OVERNIGHT

SPEND	VISITORS
\$453M +15% y/y	1.1M +16% y/y
▼ -24% 2019 / 21	▼ -35% 2019 / 21

DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Geelong and the Bellarine in the year ending December 2021 was estimated to be \$453 million, up 15 per cent on 2020. However, spend was down 24 per cent on the year ending December 2019 (pre-COVID-19). Visitors spent an average of \$152 per night and \$418 per visitor in 2021.



DOMESTIC DAYTRIPS

SPEND	DAYTRIPS
\$276M +21% y/y	2.7M +7% y/y
▼ -38% 2019 / 21	▼ -43% 2019 / 21

DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$276 million in the year ending December 2021, a decline of 38 per cent compared to the year ending December 2019 but up 21 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: Geelong Bollards



Jobs,
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and Regions

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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)	359	390	425	444	493	415	-16%
Indirect GRP (\$m)	331	356	393	404	437	350	-20%
Total GRP (\$m)	690	745	819	848	930	765	-18%
Direct GRP (%)	3.1%	3.2%	3.4%	3.3%	3.5%	2.9%	-0.6%pts
Indirect GRP (%)	2.8%	3.0%	3.1%	3.0%	3.1%	2.4%	-0.7%pts
Total GRP (%)	5.9%	6.2%	6.5%	6.3%	6.5%	5.3%	-1.3%pts
Persons Employed							
Direct Employment (000s)	5.9	6.2	6.8	6.9	7.2	7.0	-3%
Indirect Employment (000s)	1.9	2.1	2.3	2.3	2.6	2.1	-18%
Total Employment (000s)	7.8	8.3	9.1	9.3	9.8	9.1	-7%
Direct Employment (%)	5.3%	5.5%	5.8%	5.7%	5.8%	5.5%	-0.2%pts
Indirect Employment (%)	1.7%	1.8%	1.9%	1.9%	2.0%	1.7%	-0.4%pts
Total Employment (%)	7.0%	7.3%	7.7%	7.6%	7.8%	7.2%	-0.6%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)	3,391	3,887	3,907	4,696	2,509	2,677	7%	-43%	71.2%
Overnight visitors (000's)	1,328	1,406	1,412	1,669	936	1,084	16%	-35%	28.8%
Total domestic visitors (000's)	4,720	5,292	5,319	6,365	3,445	3,761	9%	-41%	100.0%
Visitor nights (000's)	3,401	3,785	3,492	4,183	3,037	2,983	-2%	-29%	100.0%
Length of stay (nights)	2.6	2.7	2.5	2.5	3.2	2.8			
Daytrip Expenditure (\$m)	265	366	348	442	228	276	21%	-38%	37.8%
Daytrip spend per trip	78	94	89	94	91	103			
Domestic Overnight Expenditure (\$m)	505	480	540	598	393	453	15%	-24%	62.2%
Domestic Overnight Spend per Visitor (\$)	380	341	382	358	419	418			
Domestic Overnight Spend per Night (\$)	148	127	155	143	129	152			
Total Domestic Expenditure (\$m)	770	846	888	1,040	621	729	17%	-30%	100.0%
International									
Overnight visitors (000's)	54	57	56	63	16	-	-	-	-
Visitor nights (000's)	723	951	851	1,482	-	-	-	-	-
Length of stay (nights)	13.3	16.7	15.2	23.5	-	-			
International Overnight Expenditure (\$m)	66	88	101	94	-	-	-	-	-
International Overnight Spend per Visitor (\$)	1,225	1,547	1,801	1,498	-	-			
International Overnight Spend per Night (\$)	92	93	119	64	-	-			

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 Geelong and the Bellarine 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 Geelong and the Bellarine Tourism Region:

Region	SA2
Geelong and the Bellarine	Bannockburn, Golden Plains – South, Belmont, Corio – Norlane, Geelong, Geelong West - Hamlyn Heights, Grovedale, Highton, Lara, Leopold, Newcomb – Moolap, Newtown, North Geelong - Bell Park, Clifton Springs, Ocean Grove - Barwon Heads, Portarlington, Point Lonsdale - Queenscliff

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.