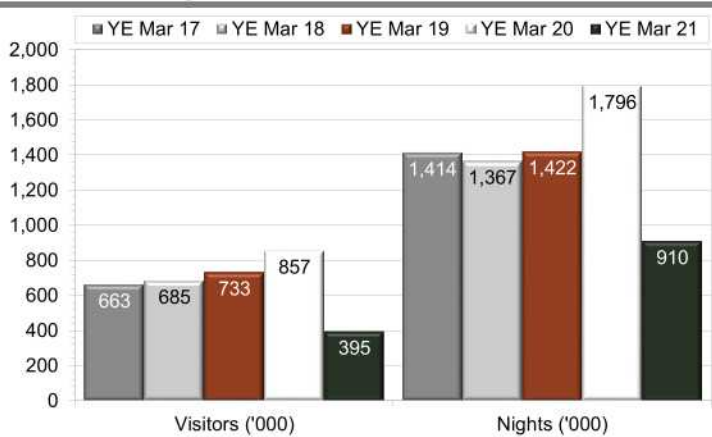


### Overnight Travel

#### Visitors and nights



The City of Ballarat received 395,000 overnight visitors - down by 53.8% on YE Mar 20. Visitors spent 910,000 nights in the City - down by 49.3% on YE Mar 20.

#### Expenditure (2)

Overnight visitors spent \$165 million in the City of Ballarat - down by 35.9% on YE Mar 20. On average, they spent \$181 per night - up by 26.4% on YE Mar 20.

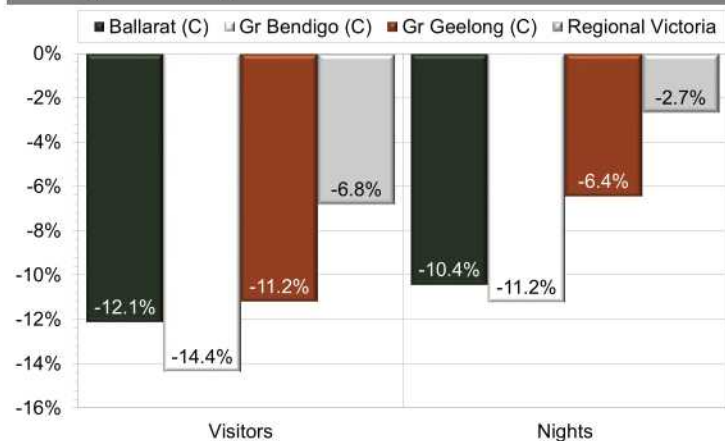
(2) Sources: NVS and Regional Expenditure Model, YE Mar 21, TRA.

#### Market share

The overnight sector represented 24.4% all domestic visitors to the City of Ballarat - down by 7.6% pts on YE Mar 20. The overnight sector contributed 46.7% of total domestic spend in the City - down by 5.9% pts on YE Mar 20.

The City of Ballarat received 3.6% of visitors and 2.5% of nights in regional Victoria. Compared to YE Mar 20, the share of visitors was down by 1.1% pts and the share of nights was down by 1.0% pt.

#### Average annual growth - YE Mar 17 to YE Mar 21



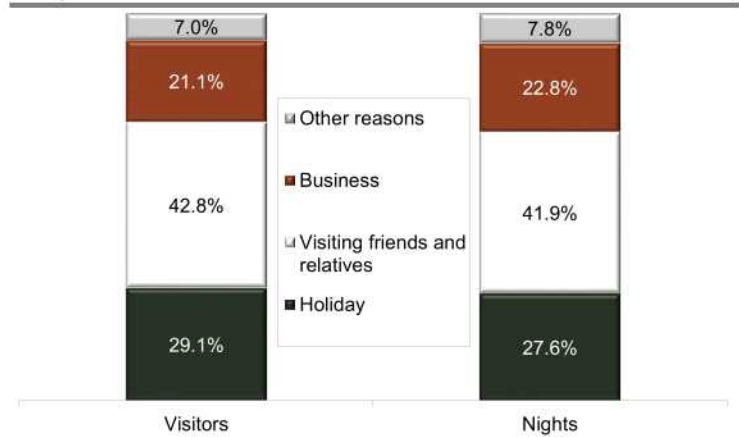
Over the period YE Mar 17 to YE Mar 21, the City of Ballarat had an average annual decline of -12.1% in **visitors**. The City had a lower decline than Greater Bendigo (C), but a higher decline than Greater Geelong (C) and regional Victoria.

The City of Ballarat had an average annual decline of -10.4% in **nights** over the period. The City had a lower decline than Greater Bendigo (C), but a higher decline than Greater Geelong (C) and regional Victoria.

City of Ballarat comprises: Ballarat municipality / Local Government Area.

(1) Source: National Visitor Survey (NVS), YE Mar 21, Tourism Research Australia (TRA) – unless otherwise specified

#### Purpose of visit



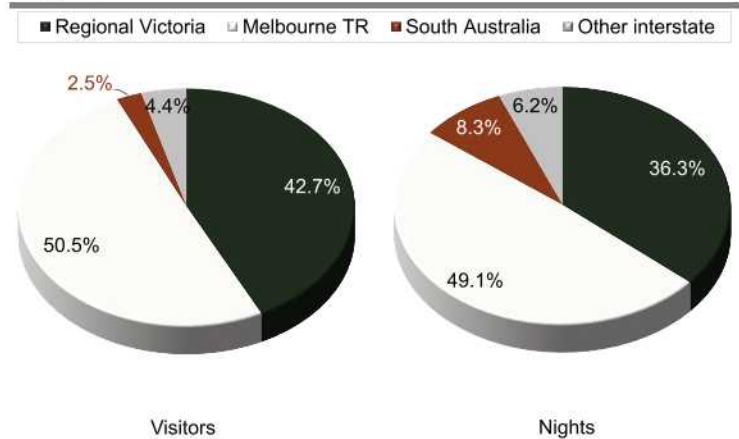
'Visiting friends and relatives (VFR)' (42.8%) was the largest purpose for **visitors** to the City of Ballarat. 'Holiday' (29.1%) was the 2<sup>nd</sup> largest purpose, followed by 'business' (21.1%).

Compared to YE Mar 20, 'medical reasons' was up by 1.5% pts while 'holiday' was down by 3.6% pts.

'VFR' (41.9%) was the largest purpose in terms of **nights** in the City of Ballarat. 'Holiday' (27.6%) was the 2<sup>nd</sup> largest purpose, followed by 'business' (22.8%).

Compared to YE Mar 20, 'business' was up by 7.8% pts while 'holiday' was down by 3.4% pts.

#### Origin



**Melbourne tourism region** was the City of Ballarat's largest source market. Melbourne tourism region contributed 50.5% of visitors and 49.1% of nights in the City. Compared to YE Mar 20, visitors from Melbourne tourism region were down by 49.8%.

**Regional Victoria** contributed 42.7% of visitors and 36.3% of nights in the City of Ballarat. Compared to YE Mar 20, visitors from regional Victoria were down by 44.9%.

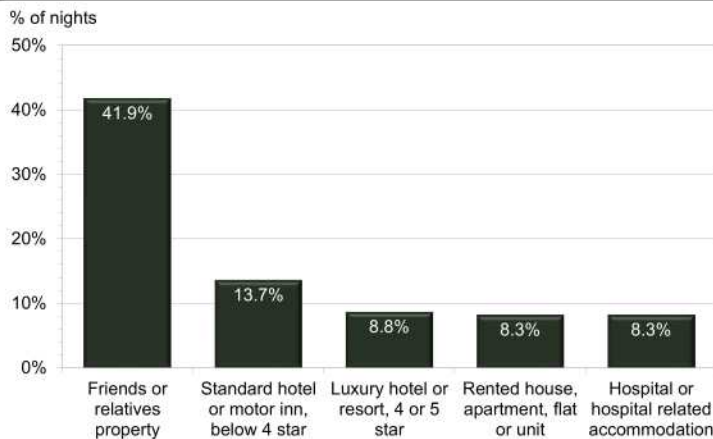
**Interstate** contributed 6.9% of visitors and 14.6% of nights in the City.

#### Month returned from trip

January (19.2%) was the most popular month for visitors to return from their trip to the City of Ballarat. March (16.6%) was the 2<sup>nd</sup> most popular month to return from the trip, followed by December (12.0%).

## Overnight travel (cont)

### Accommodation



'Friends or relatives property' (41.9%) was the most popular accommodation type used for **nights** in the City of Ballarat. 'Standard hotel or motor inn, below 4 star' (13.7%) was the 2<sup>nd</sup> most popular accommodation used.

### Length of stay

Visitors stayed on average 2.3 nights in the City of Ballarat - up by 0.2 nights on YE Mar 20.

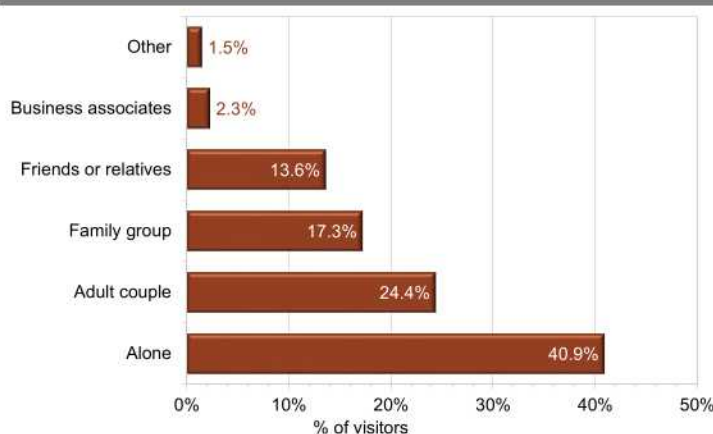
### Activities

'Visit friends and relatives' (44.1%) was the most popular activity undertaken by visitors to the City of Ballarat. 'Eat out, dine at a restaurant or cafe' (43.2%) was the 2<sup>nd</sup> most popular activity undertaken, followed by 'sightseeing or looking around' (18.3%) and 'visit botanical or other public gardens' (17.2%).

### All transport

'Private vehicle or company car' (93.4%) was the most popular transport used by visitors to the City of Ballarat. 'Bus or coach' (2.7%) was the 2<sup>nd</sup> most popular transport used, followed by 'railway' (2.2%).

### Travel party



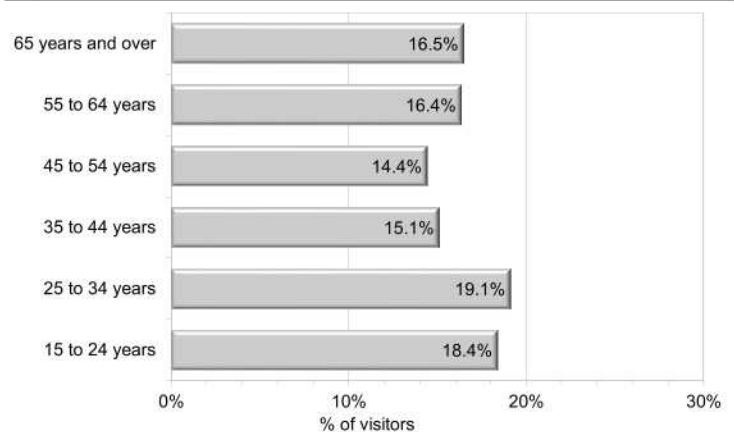
'Alone' (40.9%) was the largest travel party description for visitors to the City of Ballarat. 'Adult couple' (24.4%) was the 2<sup>nd</sup> most common travel party, followed by 'family group' (17.3%).

### Number of stopovers on trip

Nearly 9/10 (86.9%) visitors to the City of Ballarat had one stopover only on the trip. Nearly 1/10 (9.2%) had two stopovers on the trip.

Note: Percentage change figures provided in this report do not necessarily represent statistically significant change.

### Age



'25 to 34 years' (19.1%) was the biggest age group of visitors to the City of Ballarat. '15 to 24 years' (18.4%) was the 2<sup>nd</sup> biggest age group, followed by '65 years and over' (16.5%).

### Gender

More visitors to the City of Ballarat were male (55.6%) than female (44.4%).

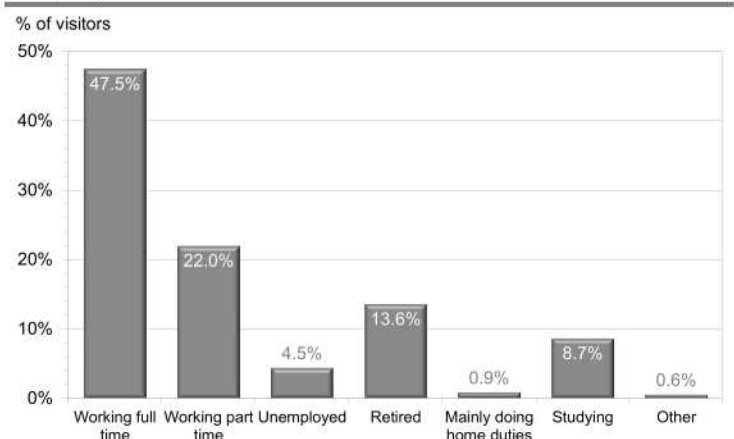
### Lifecycle

'Young or midlife single' (23.1%) was the largest lifecycle group of visitors to the City of Ballarat. 'Older working' (19.9%) was the 2<sup>nd</sup> largest lifecycle group, followed by 'parent with youngest child aged under 15' (19.9%).

### Marital status

More visitors to the City of Ballarat were married or part of a couple (65.5%) than single (33.7%).

### Employment



'Working full time' (47.5%) was the most common employment status of visitors to the City of Ballarat. 'Working part time' (22.0%) was the 2<sup>nd</sup> most common employment status, followed by 'retired' (13.6%).

### Annual household income

The average annual household income was \$118,633 amongst visitors to the City of Ballarat. Over ¼ (27.5%) of visitors had an annual household income of '\$150,000+'.

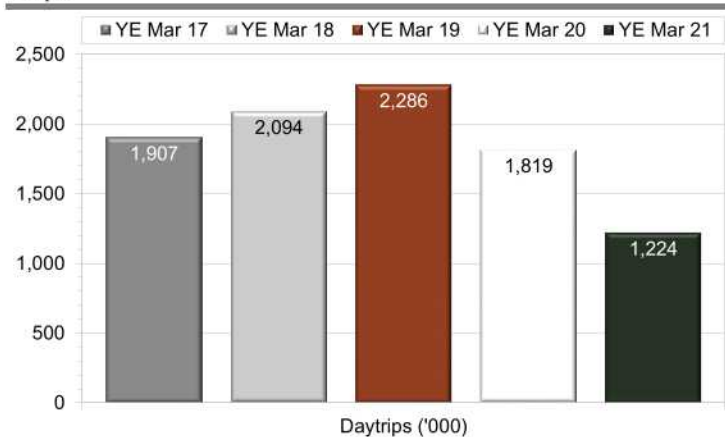
Note: nearly 3/10 (27.8%) did not provide an income.

# Domestic travel to the City of Ballarat (1)

For the period April 2020 to March 2021

## Daytrip travel

### Trips



The City of Ballarat received over 1.2 million daytrip visitors - down by 32.7% on YE Mar 20.

### Expenditure (2)

Daytrip visitors spent \$188 million in the City of Ballarat - down by 19.0% on YE Mar 20. On average, they spent \$154 per trip - up by 20.4% on YE Mar 20.

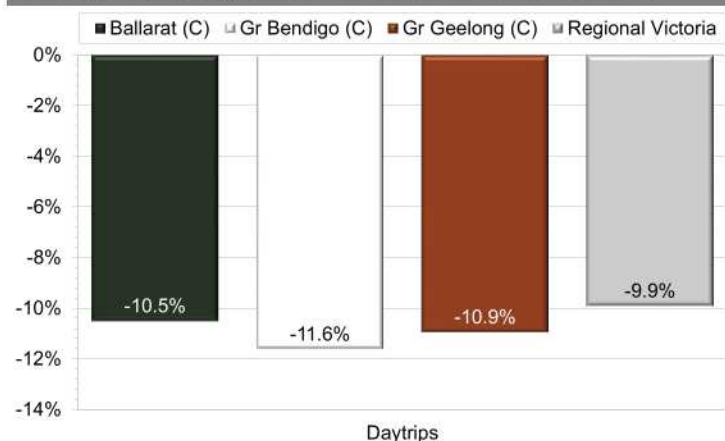
(2) Sources: NVS and Regional Expenditure Model, YE Mar 21, TRA.

### Market share

The daytrip sector represented 75.6% all domestic visitors to the City of Ballarat - up by 7.6% pts on YE Mar 20. The daytrip sector contributed 53.3% of total domestic spend in the City - up by 5.9% pts on YE Mar 20.

The City of Ballarat received 5.7% of daytrips to regional Victoria. Compared to YE Mar 20, the share was up by 1.2% pts.

### Average annual growth - YE Mar 17 to YE Mar 21



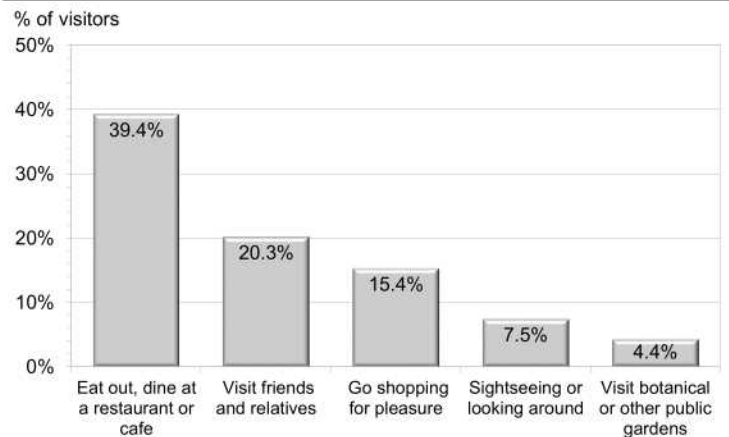
Over the period YE Mar 17 to YE Mar 21, the City of Ballarat had an average annual decline of -10.5% in daytrips. The City had a lower decline than Greater Bendigo (C) and Greater Geelong (C), but a higher decline than regional Victoria.

### Main purpose of trip

'Holiday' (31.8%) was the largest purpose for visitors to the City of Ballarat. 'Visiting friends and relatives (VFR)' (21.8%) was the 2<sup>nd</sup> largest purpose, followed by 'medical reasons' (18.0%).

Compared to YE Mar 20, 'medical reasons' was up by 11.1% pts while 'VFR' was down by 17.3% pts.

### Activities



'Eat out, dine at a restaurant or cafe' (39.4%) was the most popular activity undertaken by visitors to the City of Ballarat.

### Transport

'Private vehicle or company car' (96.5%) was the most popular transport used by visitors to the City of Ballarat. 'Rental car' (1.2%) was the 2<sup>nd</sup> most popular transport used.

### Origin

Melbourne tourism region (24.7%) was the City of Ballarat's largest source market. Central Highlands tourism region (15.2%) was the 2<sup>nd</sup> largest source market. Regional Victoria contributed (75.3%) of all daytrip visitors to the City.

### Age

'65 years and over' (24.5%) was the biggest age group of visitors to the City of Ballarat. '25 to 34 years' (21.7%) was the 2<sup>nd</sup> biggest age group, followed by '35 to 44 years' (18.7%).

### Month travelled

March (16.3%) was the most popular month for a daytrip to the City of Ballarat. December (14.0%) was the 2<sup>nd</sup> most popular month to travel, followed by May (12.7%).

## Total domestic travel

### Visitors, nights and spend

	YE Mar 17	YE Mar 18	YE Mar 19	YE Mar 20	YE Mar 21	Change on last year
<b>Domestic visitors ('000)</b>						
Overnight visitors	663	685	733	857	395	-53.8%
Daytrip visitors	1,907	2,094	2,286	1,819	1,224	-32.7%
<b>Total domestic visitors</b>	<b>2,570</b>	<b>2,779</b>	<b>3,020</b>	<b>2,676</b>	<b>1,619</b>	<b>-39.5%</b>
<b>Domestic nights ('000)</b>						
<b>Total domestic nights</b>	<b>1,414</b>	<b>1,367</b>	<b>1,422</b>	<b>1,796</b>	<b>910</b>	<b>-49.3%</b>
<b>Domestic spend (\$ million)</b>						
Overnight spend (2)	\$201	\$217	\$218	\$257	\$165	-35.9%
Daytrip spend (2)	\$220	\$193	\$240	\$232	\$188	-19.0%
<b>Total domestic spend (2)</b>	<b>\$420</b>	<b>\$410</b>	<b>\$458</b>	<b>\$490</b>	<b>\$353</b>	<b>-27.9%</b>

The City of Ballarat received over 1.6 million domestic visitors - down by 39.5% on YE Mar 20. Visitors spent 910,000 nights in the City - down by 49.3% on YE Mar 20. In total, domestic visitors spent \$353 million on travel to the City of Ballarat - down by 27.9% on YE Mar 20.

(2) Sources: NVS and Regional Expenditure Model, YE Mar 21, TRA.

Note: Percentage change figures provided in this report do not necessarily represent statistically significant change.