

Yarra Valley and Dandenong Ranges

Regional Tourism Summary

Year Ending December 2018



Tourism is an important industry for Yarra Valley and Dandenong Ranges. The region received approximately 5.6 million domestic (overnight and daytrip) and international overnight visitors combined, who spent an estimated \$707 million in the year ending December 2018.

The Yarra Valley Dandenong Ranges tourism region comprises two tourism sub-regions: Melbourne East and Upper Yarra¹

GROSS REGIONAL PRODUCT



GRP	% OF ECONOMY
\$574M ▲ 5.9%	6.6% ▼ -0.1%pts

TOURISM EMPLOYMENT



JOBS	% OF ECONOMY
6,600 ▲ 3.3%	7.3% ▼ -0.1%pts

DOMESTIC OVERNIGHT



SPEND	VISITORS
\$305M ▼ -2.2%	844M ▼ -13.8%

DOMESTIC DAYTRIPS



SPEND	DAYTRIPS
\$341M ▼ -4.9%	4.7M ▲ 9.9%

INTERNATIONAL OVERNIGHT



SPEND	VISITORS
np	47,000 ► -0.4%

"np" – not publishable

VALUE OF TOURISM

In 2016-17, tourism was estimated to be worth \$574 million to the region's economy (in direct and indirect Gross Regional Product), representing 6.6 per cent of the region's economy.

Tourism generated employment of approximately 6,600 people or 7.3 per cent of the region's employment (direct and indirect jobs).

DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Yarra Valley and Dandenong Ranges in the year ending December 2018 was estimated to be \$305 million (-2.2 per cent year-on-year), with visitors spending an average of \$148 per night and \$361 per visitor.

DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$341 million in the year ending December 2018, a decline of 4.9 per cent compared to the previous year.

INTERNATIONAL OVERNIGHT SPEND

There were an estimated 47,000 international overnight visitors to the Yarra Valley and Dandenong Ranges in the year ending December 2018, broadly in line with the previous year.

Yarra Valley and Dandenong Ranges

Key Regional Tourism Statistics (Year ending December)

Tourism Economic Contribution	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	AAG (2012-17) (% p.a.)	YOY change (2016-17) (%)
Gross Regional Product (GRP)								
Direct GRP (\$m)	236	243	280	256	295	318	6.2%	7.9%
Indirect GRP (\$m)	208	207	251	208	247	256	4.2%	3.4%
Total GRP (\$m)	444	450	531	464	542	574	5.3%	5.9%
Direct GRP (%)	3.3%	3.3%	3.7%	3.2%	3.6%	3.7%	0.4%pt	0.0%pt
Indirect GRP (%)	2.9%	2.8%	3.3%	2.6%	3.1%	3.0%	0.0%pt	-0.1%pt
Total GRP (%)	6.2%	6.1%	7.1%	5.9%	6.7%	6.6%	0.4%pt	-0.1%pt
Persons Employed								
Direct Employment (000s)	4.5	4.5	5.0	4.5	5.0	5.2	2.8%	3.1%
Indirect Employment (000s)	1.1	1.1	1.4	1.2	1.4	1.4	5.1%	3.8%
Total Employment (000s)	5.6	5.7	6.4	5.7	6.4	6.6	3.3%	3.3%
Direct Employment (%)	5.5%	5.5%	6.0%	5.3%	5.7%	5.7%	0.2%pt	0.0%pt
Indirect Employment (%)	1.4%	1.4%	1.7%	1.4%	1.6%	1.6%	0.2%pt	0.0%pt
Total Employment (%)	6.9%	6.9%	7.7%	6.7%	7.3%	7.3%	0.4%pt	-0.1%pt

Years ending December Visitors, Nights and Expenditure	2013	2014	2015	2016	2017	2018	AAG (2013-18) (% p.a.)	YOY change (2017-18) (%)	2018 Share of Total
Domestic									
Daytrip visitors (000's)	3,212	3,644	3,966	4,317	4,312	4,738	8.1%	9.9%	84.2%
Overnight visitors (000's)	624	742	762	840	979	844	6.3%	-13.8%	15.0%
Total domestic visitors (000's)	3,835	4,386	4,729	5,157	5,291	5,582	7.8%	5.5%	99.2%
Visitor nights (000's)	1,739	1,792	1,903	2,020	2,316	2,059	3.4%	-11.1%	70.6%
Length of stay (nights)	2.8	2.4	2.5	2.4	2.4	2.4			
Daytrip Expenditure (\$m)	274	285	277	327	358	341	4.5%	-4.9%	48.1%
Daytrip spend per trip	85	78	70	76	83	72			
Domestic Overnight Expenditure (\$m)	309	215	231	238	312	305	-0.3%	-2.2%	43.1%
Domestic Overnight Spend per Visitor (\$)	495	290	303	284	318	361			
Domestic Overnight Spend per Night (\$)	178	120	121	118	135	148			
Total Domestic Expenditure (\$m)	583	500	508	565	670	645	2.1%	-3.6%	91.2%
International									
Overnight visitors (000's)	33	37	42	49	47	47	7.2%	-0.4%	0.8%
Visitor nights (000's)	726	917	739	743	822	858	3.4%	4.4%	29.4%
Length of stay (nights)	21.7	24.8	17.8	15.2	17.3	18.2			
International Overnight Expenditure (\$m)	42	35	39	36	51	-	-	-	-
International Overnight Spend per Visitor (\$)	1,268	961	932	737	1,079	-			
International Overnight Spend per Night (\$)	58	39	52	49	62	-			
TOTALS									
Visitors (000's)	3,869	4,423	4,770	5,206	5,339	5,629	7.8%	5.4%	
Visitor nights (000's)	2,465	2,709	2,642	2,763	3,138	2,917	3.4%	-7.0%	
Expenditure (\$m)	625	536	546	601	721	707	2.5%	-1.9%	

Sources: National and International Visitor Survey, Regional Expenditure Model, December 2018, Tourism Research Australia.

Regional Tourism Satellite Account 2016-17, Tourism Research Australia

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

AAG = Average Annual Growth. YOY = year-on-year growth

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¹ Yarra Valley and Dandenong Ranges 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 Yarra Valley and Dandenong Ranges tourism region:

Region	SA2
Melbourne East	Beaconsfield – Officer, Belgrave – Selby, Bunyip – Garfield, Chirnside Park, Eltham, Emerald – Cockatoo, Healesville – Yarra Glen, Hurstbridge, Kilsyth, Koo Wee Rup, Lilydale – Coldstream, Monbulk – Silvan, Montrose, Mooroolbark, Mount Dandenong – Olinda, Mount Evelyn, Pakenham – North, Pakenham – South, Pantan Hill – St Andrews, Plenty – Yarrambat, Research – North Warrandyte, Upwey – Tecoma, Wandin – Seville, Wattle Glen – Diamond Creek, Yarra Valley
Upper Yarra	Alexandra, Kinglake, Upper Yarra Valley, Yea

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 defined by the Australian Bureau of Statistics. 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 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>

For further information on the methodology and key concepts for the Victorian Regional Tourism Satellite Accounts 2016-17, please refer to the Regional Tourism Satellite Account profiles at:

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

For more detail on the State Tourism Satellite Accounts 2016-17, published by Tourism Research Australia refer to the full report:

<https://www.tra.gov.au/research/view-all-publications/all-publications/economic-reports/state-tourism-satellite-accounts-2016-17>