

# THE ECONOMIC CONTRIBUTION OF TOURISM TO VICTORIA'S REGIONS 2021-22



Regional Tourism Satellite Account data produced by Tourism Research Australia  
Report published in July 2023



Tourism and Events

# THE ECONOMIC CONTRIBUTION OF TOURISM TO VICTORIA'S REGIONS 2021-22

## Contents

• <a href="#">Summary overview</a>	3
• <a href="#">Melbourne and regional Victoria key metrics</a>	4
• <a href="#">Key results table</a>	5
• <a href="#">Tourism consumption</a>	6
• <a href="#">Gross Value Added</a>	6
• <a href="#">Gross Value Added by industry</a>	7
• <a href="#">Significance of tourism to Victoria's regions</a>	8
• <a href="#">Direct filled jobs by industry</a>	10
• <a href="#">Data tables</a>	11
• <a href="#">Methodology / data definitions / notes</a>	14

Regional Tourism Satellite Account (RTSA) estimates in this publication are not comparable to the previously published RTSA estimates due to data input and methodology improvements. This includes a revised approach to filled jobs metrics which has created a major shift in the time series due to the adoption of 'filled jobs' from the Labour Account rather than 'employed persons' based on the Labour Force survey. The most recent results from the RTSA should only be compared to the revised time series in this publication to ensure like-for-like comparisons. Refer to the [data notes](#) for further information.



We acknowledge the Traditional Aboriginal Owners of Country throughout Victoria and pay our respect to them, their connections to land, sea, and community. We pay our respects to their Elders past and present and future Traditional Owners.

# Regional Tourism Satellite Account

## Summary Overview 2021-22



These regional economic results for the 2021-22 financial year show signs of the early recovery in tourism activity in Victoria which was underway at the end of 2021 and in the first half of 2022, with strong growth recorded for most key metrics compared to the previous financial year (2020-21). However, the negative impacts of COVID-19 on tourism are still evident in these 2021-22 results, which reflect the impacts of international and state border closures, as well as other movement restrictions which affected travel to and within Victoria's regions during this period.



A revised approach to employment metrics has been taken in this RTSA release which has created a major shift in the time series due to the adoption of filled jobs from the Labour Account rather than employed persons based on the Labour Force survey (refer [data notes](#) for further information).



Regional Victoria recorded strong gains in the 2021-22 results compared to 2020-21 in all key measures including Gross Regional Product (GRP) which increased by 40.0% and filled jobs which increased by 41.8%. Most key measures were still below the pre-pandemic 2018-19 performance with GRP and jobs noting declines of 24.6% and 18.4% respectively.

Regional Victoria contributed more tourism jobs (direct and indirect) to Victoria than Melbourne in 2021-22 (96,400 jobs compared to 68,100 in Melbourne). As such, **59% of all tourism jobs within the state were located in regional Victoria and approximately 1 in 11 regional jobs in Victoria was generated by the tourism sector.**



Melbourne's visitor economy has overtaken regional Victoria to regain its position as the top generator of tourism GRP in Victoria. Tourism GRP was worth \$7.9 billion in Melbourne in 2021-22, which was 78.8% above the 2020-21 estimate, although below the pre-pandemic level (-56.6%). Tourism filled jobs (direct and indirect) in Melbourne also increased significantly year-on-year to 68,100 (+83.4%), although remained below the 2018-19 estimate (-55.6%).



Tourism GVA was dominated by domestic travel in 2021-22, with limited international travel allowed due to border closures during some of the reporting period. Intrastate travel made the largest contribution to tourism GVA in both Melbourne and regional Victoria reinforcing the importance of this segment to regional economies over the past few years and Victorians preference for local travel. Overall, 97% of regional Victoria's direct tourism GVA was attributable to domestic visitors with only 3% attributable to international overnight visitors.



Cafés, restaurants and takeaway food services made the greatest contribution to employment in both Melbourne and regional Victoria with a 33.2% and 45.5% share of direct filled jobs respectively. The largest industry for tourism GVA in Melbourne was accommodation which contributed \$1.1 billion to direct tourism GVA. In regional Victoria, food services made the highest contribution to direct tourism GVA at \$908 million (this includes both cafes, restaurants and food services and clubs, pubs, Taverns and bars).



The regions with the greatest reliance on the tourism industry were Phillip Island and Victoria's High Country. In Phillip Island, tourism represented 13.2% of direct GRP and 30.8% of direct filled jobs in the region. In Victoria's High Country tourism represented 6.8% of direct GRP and 17.8% of direct filled jobs.



All regions noted large increases in direct tourism filled jobs in 2021-22 compared to 2020-21, reflecting the early stages of the rebound in travel activity, particularly within the intrastate market. Notably, some regions recorded more direct tourism filled jobs compared to 2018-19 (pre-pandemic) including Gippsland (+4.8%) and Grampians (+2.1%).



Tourism's recovery in Victoria has strengthened over the past year which is not reflected in these RTSA results for 2021-22. Total tourism spend has fully recovered back above pre-pandemic levels to a record breaking \$35 billion in the year ending March 2023\*. The sector remains optimistic that the strong pent up demand to travel will continue, buoyed further by the progressive return of international visitors in 2023. The strong rebound in tourism in Victoria will be captured in the next RTSA release for 2022-23, however these results will not be available until mid-2024, due to the long lag in the release of economic estimates.

\*Results from the National and International Visitor Surveys, year ending March 2023 published by Tourism Research Australia June 2023

# Regional Tourism Satellite Account 2021-22

## Melbourne and Regional Victoria - Key Results

### Melbourne

### Regional Victoria

#### Gross Regional Product (GRP)

- In 2021-22, total tourism GRP in Melbourne was worth \$7.9 billion (direct and indirect), noting an increase of 78.8% compared to 2020-21, however was down 56.6% compared to 2018-19.
- Tourism GRP accounted for 2.0% of Melbourne's total GRP (direct and indirect), down 3.1 percentage points from 2018-19.
- In comparison, total GRP for the Melbourne economy overall grew by 9.3% compared to 2018-19, reinforcing the disproportionate negative impact that COVID-19 had on the tourism sector in Melbourne relative to the rest of the economy.

- In 2021-22, total tourism GRP in regional Victoria was worth \$7.0 billion (direct and indirect), recording an increase of 40.0% compared to 2020-21, although was down 24.6% compared to 2018-19.
- Tourism GRP accounted for 5.7% of the region's total GRP (down 3.4 percentage points from 2018-19).
- Total GRP in Victoria's regional economy increased by 20.1% in 2021-22 compared to 2018-19 estimates, in contrast to the decline noted in tourism GRP in regional Victoria at the same time (-24.6%).

**\$7.9b**

↑78.8%  
FY21/22

↓56.6%  
FY19/22



**\$7.0b**

↑40.0%  
FY21/22

↓24.6%  
FY19/22

#### Tourism Filled Jobs

- In 2021-22, tourism in Melbourne generated 68,100 filled jobs (direct and indirect) or 2.6% of the region's total filled jobs (down from 6.0% in 2018-19).
- Tourism filled jobs in Melbourne rebounded by 83.4% from 2020-21 estimates, however were 55.6% below the 2018-19 level, reflecting the impacts of the pandemic.
- Conversely, overall filled jobs in the Melbourne economy grew moderately in the period, up by 3.1% from 2018-19 to 2021-22.

- In 2021-22, tourism generated 96,400 jobs (direct and indirect) in regional Victoria, recording an increase of 41.8% compared to 2020-21. However, remained 18.4% below 2018-19 estimates due to the impacts of COVID-19.
- Tourism contributed 9.3% of total filled jobs in regional Victoria (down from 11.7% in 2018-19). Approximately 59% of all tourism jobs *within the state* were in regional Victoria.
- Overall filled jobs in regional Victoria increased by 2.9% in 2021-22 compared to 2018-19 estimates, highlighting the more severe negative impacts of the pandemic on the tourism industry in Victoria's regions (i.e. tourism filled jobs declined by 18.4%) in the same period.

**68.1k**

↑83.4%  
FY21/22

↓55.6%  
FY19/22



**96.4k**

↑41.8%  
FY21/22

↓18.4%  
FY19/22

#### Gross Value Added (GVA)

- In 2021-22, tourism was worth \$7.0 billion in GVA. This was 1.9% of the region's total GVA (direct and indirect), down from 4.9% in 2018-19.
- Tourism GVA in Melbourne increased by 78.6% in 2021-22 compared to 2020-21, however remained 57.5% below the 2018-19 level due to the negative impacts of COVID-19.
- In comparison, overall GVA in Melbourne's economy increased (+9.7%) in 2021-22 compared to 2018-19, illustrating that tourism has been more adversely affected than other sectors of Melbourne's economy.

- In 2021-22, tourism GVA in regional Victoria was worth \$6.1 billion (direct and indirect), recording an increase of 39.6% from 2020-21, although remained 25.9% below the pre-pandemic result from 2018-19 which was less than the decline in GVA noted in Melbourne.
- Tourism contributed 5.4% to regional Victoria's overall GVA, down from 8.8% in 2018-19.
- Total economy wide GVA in regional Victoria grew by 20.4% in 2021-22 compared to 2018-19 estimates, in contrast to the large decline noted in tourism GVA in the period (-25.9%).

**\$7.0b**

↑78.6%  
FY21/22

↓57.5%  
FY19/22



**\$6.1b**

↑39.6%  
FY21/22

↓25.9%  
FY19/22

# Regional Tourism Satellite Account 2021-22

## Victoria's Regions – key results table

	2021-22	Change on 2018-19	Change on 2020-21	2021-22	Change on 2018-19	Change on 2020-21
<b>Tourism GVA (\$M)</b>	<b>Melbourne</b>			<b>Regional Victoria</b>		
Direct	3,814	▼ -57.6%	▲ 73.9%	3,097	▼ -28.7%	▲ 43.6%
Indirect	3,159	▼ -57.5%	▲ 84.6%	3,030	▼ -22.9%	▲ 35.8%
Total tourism GVA	6,973	▼ -57.5%	▲ 78.6%	6,127	▼ -25.9%	▲ 39.6%
Total region GVA	364,326	▲ 9.7%	▲ 7.0%	113,321	▲ 20.4%	▲ 13.1%
Tourism's direct share of region GVA	1.0%	▼ -1.7% pts	▲ 0.4% pts	2.7%	▼ -1.9% pts	▲ 0.6% pts
<b>Tourism GRP (\$M)</b>	<b>Melbourne</b>			<b>Regional Victoria</b>		
Direct	4,165	▼ -57.3%	▲ 76.0%	3,392	▼ -28.9%	▲ 46.9%
Indirect	3,718	▼ -55.9%	▲ 82.1%	3,568	▼ -20.1%	▲ 34.0%
Total tourism GRP	7,882	▼ -56.6%	▲ 78.8%	6,960	▼ -24.6%	▲ 40.0%
Total region GRP	393,001	▲ 9.3%	▲ 7.2%	122,240	▲ 20.1%	▲ 13.3%
Tourism's direct share of region GRP	1.1%	▼ -1.7% pts	▲ 0.4% pts	2.8%	▼ -1.9% pts	▲ 0.6% pts
<b>Tourism Filled Jobs ('000)</b>	<b>Melbourne</b>			<b>Regional Victoria</b>		
Direct	46.8	▼ -53.9%	▲ 80.9%	75.1	▼ -16.1%	▲ 43.2%
Indirect	21.3	▼ -58.9%	▲ 89.0%	21.3	▼ -25.6%	▲ 36.9%
Total tourism employment	68.1	▼ -55.6%	▲ 83.4%	96.4	▼ -18.4%	▲ 41.8%
Total region employment	2,643.9	▲ 3.1%	▲ 3.6%	1,035.1	▲ 2.9%	▲ 3.4%
Tourism's direct share of region employment	1.8%	▼ -2.2% pts	▲ 0.8% pts	7.3%	▼ -1.6% pts	▲ 2.0% pts

Source: Tourism Research Australia's Regional Tourism Satellite Account 2021-22. Note estimates are impacted by rounding.

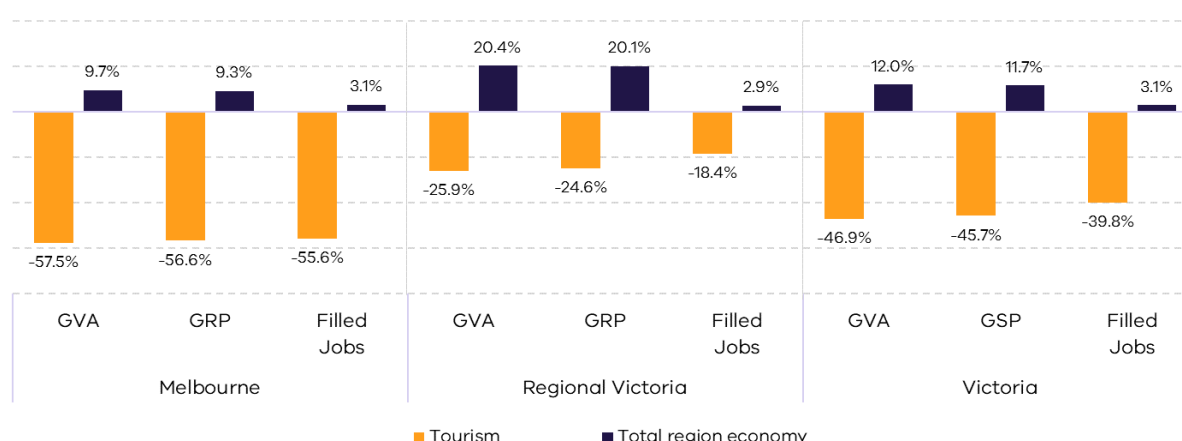
### HOW DO I READ THIS TABLE?

- In 2021-22, *direct* tourism GRP in Melbourne was worth \$4.2 billion (+76.0% compared to 2020-21).
- This was 1.1 % of the region's total direct GRP.
- *Indirect* tourism GRP was worth an extra \$3.7 billion to Melbourne's economy.
- So, in 2021-22 tourism (both direct and indirect) was worth \$7.9 billion to Melbourne's economy.

Regional Tourism Satellite Account (RTSA) estimates in this publication are not comparable to the previously published RTSA estimates due to data input and methodology improvements. This includes a revised approach to filled jobs metrics which has created a major shift in the time series due to the adoption of 'filled jobs' from the Labour Account rather than 'employed persons' based on the Labour Force survey. The most recent results from the RTSA should only be compared to the revised time series to ensure like-for-like comparisons. Refer to the [data notes](#) for further information.

Tourism is a valuable contributor to Victoria's regional economies. However, as noted below in figure 1 the sector was more adversely impacted by the COVID-19 pandemic than Victoria's economy overall. For example, tourism GRP in Melbourne was 56.6% below the pre-pandemic estimate from 2018-19, while GRP in Melbourne's economy overall increased by 9.3% in the same period. Tourism GRP in regional Victoria was also 24.6% below the 2018-19 estimate, while GRP in regional Victoria overall increased by 20.1%, reinforcing the negative impacts of the pandemic on tourism relative to other areas of the economy.

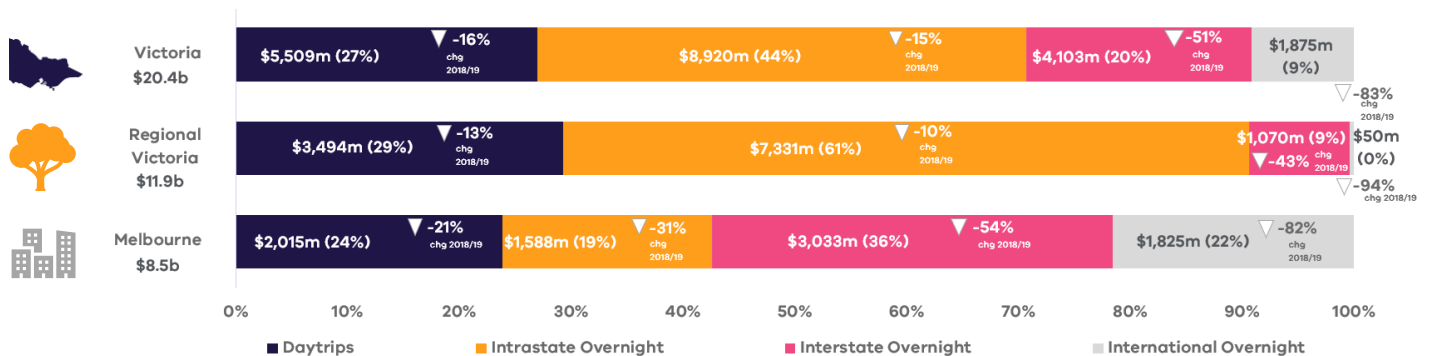
**Figure 1. Change in key economic measures for tourism versus total economy since 2018-19**



# Regional Tourism Satellite Account 2021-22

## Tourism Consumption

**Figure 2. Share of Regional Consumption by Visitor Segment**

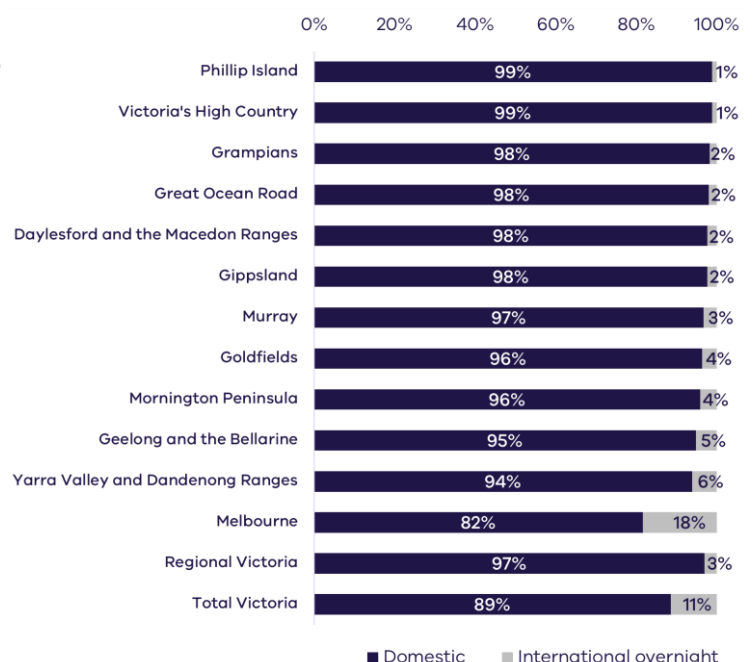


- During 2021-22 over a third of tourism consumption in Melbourne was by interstate overnight visitors (36%), while interstate consumption in regional Victoria accounted for 9% of total consumption.
  - Interstate overnight consumption remained below 2018-19 estimates (-54% for Melbourne and -43% for regional Victoria).
  - International visitors accounted for 22% of tourism consumption in Melbourne in 2021-22, this represented a decrease in consumption of 82% compared to 2018-19, reflecting border closures in the period. International consumption previously accounted for almost half all tourism consumption in Melbourne (47% in 2018-19).
  - International consumption represented just 0.4% of consumption in regional Victoria in 2021-22 which was well below the 2018-19 estimate (-94%).
  - Intrastate overnight visitors travelling within Victoria accounted for almost two-thirds (61%) of tourism consumption in regional Victoria during 2021-22, however accounted for 19% of tourism consumption in Melbourne.
  - Intrastate overnight consumption in regional Victoria was 10% below 2018-19 estimates in 2021-22.
  - Intrastate consumption in Melbourne was 31% below 2018-19 estimates, which was larger than the rate of decline noted in regional Victoria (-10%).
  - Daytrips contributed 29% of tourism consumption in regional Victoria and 24% in Melbourne. Daytrip consumption was below the pre-pandemic performance in both Melbourne (-21%) and regional Victoria (-13%).
- Refer to [data table](#) for further information.

## Gross Value Added (GVA)

- Given that international borders fully reopened in February 2022, only limited international visitation was captured in these 2021-22 results. As such, all Victorian regions were largely reliant on domestic visitation (daytrip and overnight).
- In 2021-22, the non-metropolitan regions with the greatest proportion of direct GVA attributable to domestic (overnight and daytrip) visitors to/within Victoria were Phillip Island and Victoria's High Country (both 99%), followed by Grampians, Great Ocean Road, Daylesford and the Macedon Ranges and Gippsland, (all at 98%).
- In 2021-22, the non-metropolitan regions with the greatest proportion of direct GVA attributable to international overnight visitors to Victoria were Yarra Valley and Dandenong Ranges (6%), Geelong and the Bellarine (5%) as well as Mornington Peninsula and Goldfields (both 4%). Overall, 97% of regional Victoria's direct tourism GVA was attributable to domestic visitors, with only 3% attributable to international overnight visitors.
- In comparison, approximately 18% of Melbourne's direct tourism GVA was attributable to international overnight visitors in 2021-22, however this was previously noted as almost half (44%) of Melbourne's direct tourism GVA in 2018-19 estimates (pre-pandemic).

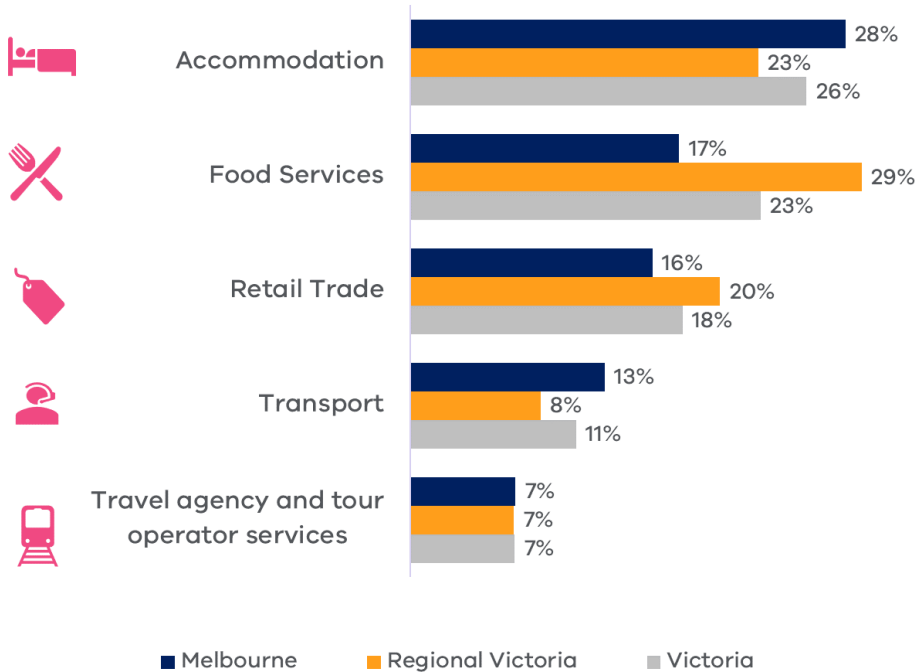
**Figure 3. Share of Direct Regional Tourism GVA**



# Regional Tourism Satellite Account 2021-22

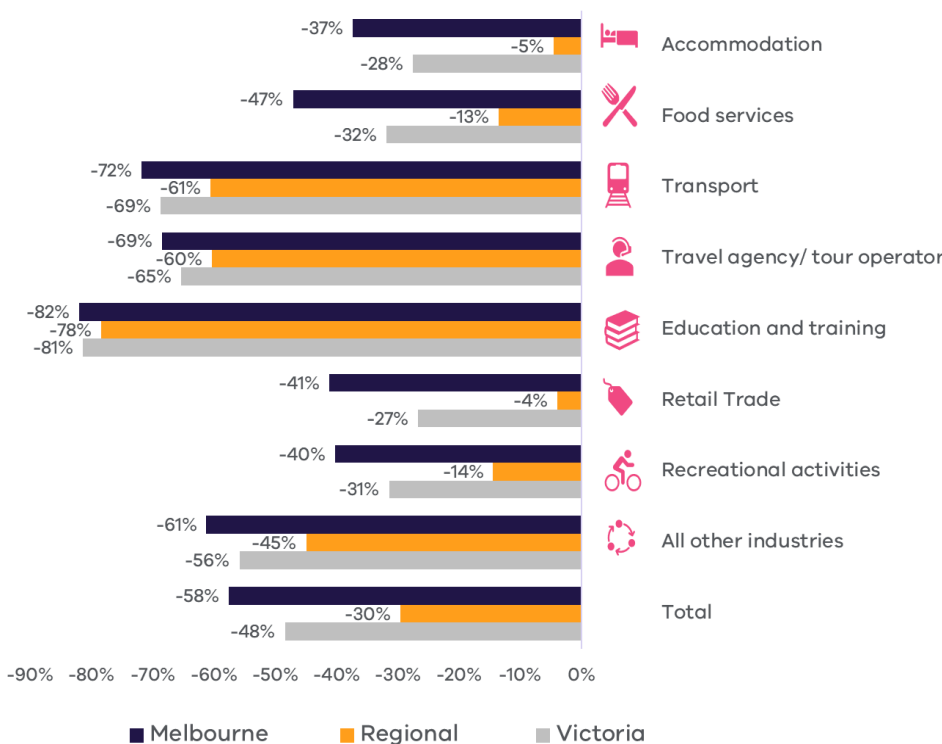
## Direct Tourism GVA by Industry

Figure 4. Industry Share of Direct Tourism GVA – Victoria’s Top 5 Sectors\*



- The five industry sectors\* that made the highest economic contribution to Victoria are noted in figure 3.
- Accommodation was the top contributing sector in Victoria at \$1.8 billion, or 26% of the state’s direct tourism GVA.
- In Melbourne, accommodation (28%) also made the greatest contribution to direct tourism GVA (worth approximately \$1.1 billion).
- In regional Victoria, food services made the highest contribution to direct tourism GVA at \$908 million or 29% of direct GVA.

Figure 5. Direct Tourism GVA – % Change in Volume from 2018-19 to 2021-22



- Direct GVA in Melbourne remained well below the 2018-19 results in all industry sectors in 2021-22. The largest decrease was noted in the education and training sector (-82%), reflecting the limited intake of international students into the city due to border closures during 2021-22. This was followed by transport (-72%), travel agency/ tour operator services (-69%), food services (-47%), retail trade (-41%), recreational activities (-40%) and accommodation (-37%).
- In regional Victoria, direct GVA levels were also well below the 2018-19 results across sectors with the largest decrease also noted in the education and training sector (-78%) followed by transport (-61%) and travel agency/ tour operator services (60%). Moderate declines were noted in recreational activities (-14%), food services (-13%), accommodation (-5%) and retail trade (-4%) industries.
- In Victoria overall, large declines were noted in education and training (-81%), transport (-69%), travel agency/ tour operator services (-65%), food services (-32%), recreational activities (-31%), accommodation (-28%) and retail trade (-27%).

\*Note: see 'Appendix B – Notes' for aggregated industry sector definitions. Refer to [data tables](#) for further information.

# Regional Tourism Satellite Account 2021-22

## Significance of Tourism to Victoria's Regions

### Direct Share of the Regional Economy (ranked by GRP share)

	Tourism Region	GRP	GVA	Filled jobs
1	Phillip Island	13.2%	12.9%	30.8%
2	Victoria's High Country	6.8%	6.5%	17.8%
3	Great Ocean Road	4.6%	4.5%	13.1%
4	Daylesford and the Macedon Ranges	3.7%	3.6%	11.0%
5	Mornington Peninsula	2.6%	2.6%	5.6%
6	Gippsland	2.5%	2.5%	7.7%
7	Grampians	2.3%	2.3%	8.5%
8	Goldfields	2.1%	2.1%	4.7%
9	Geelong and the Bellarine	2.1%	2.1%	4.7%
10	Murray	1.9%	1.9%	5.5%
11	Yarra Valley and Dandenong Ranges	1.9%	1.9%	4.1%
12	Melbourne	1.1%	1.0%	1.8%
	<b>Regional Victoria</b>	<b>2.8%</b>	<b>2.7%</b>	<b>7.3%</b>
	<b>Total Victoria</b>	<b>1.5%</b>	<b>1.4%</b>	<b>3.3%</b>

- Phillip Island has the greatest reliance on tourism of all the regions in Victoria. In Phillip Island, tourism represents 13.2% of direct GRP, 12.9% of direct GVA and 30.8% of direct filled jobs in the region.
- Victoria's High Country is the tourism region with the second highest reliance on tourism, with tourism representing 6.8% of direct GRP, 6.5% of direct GVA and 17.8% of direct filled jobs in the region.
- The regions with the highest reliance on tourism have been the most vulnerable during periods of crisis such as the COVID-19 pandemic.
- Melbourne is the region least reliant on tourism due to its diverse economy, with tourism representing 1.1% of direct GRP, 1.0% of direct GVA and 1.8% of direct filled jobs.

## Regional Contribution to Tourism Gross Regional Product (GRP) in Victoria

### Direct GRP by Region

Rank #	Region	GRP (\$M)	GRP share of Victoria (%)	% change 2018-19 vs 2021-22	% change 2020-21 vs 2021-22
1	Melbourne	4,165	55.1%	-57.3%	76.0%
2	Great Ocean Road	440	5.8%	-23.7%	41.1%
3	Gippsland	413	5.5%	-14.6%	35.7%
4	Victoria's High Country	411	5.4%	-34.3%	73.5%
5	Murray	383	5.1%	-35.4%	39.7%
6	Goldfields	368	4.9%	-29.2%	53.3%
7	Mornington Peninsula	368	4.9%	-37.4%	35.2%
8	Geelong and the Bellarine	335	4.4%	-31.4%	70.6%
9	Yarra Valley and Dandenong Ranges	206	2.7%	-31.7%	48.7%
10	Phillip Island	191	2.5%	-28.6%	42.5%
11	Grampians	143	1.9%	-9.6%	35.4%
12	Daylesford and the Macedon Ranges	134	1.8%	-20.4%	40.6%
	<b>Regional Victoria (total)</b>	<b>3,392</b>	<b>44.9%</b>	<b>-28.9%</b>	<b>46.9%</b>
	<b>Victoria (total)</b>	<b>7,557</b>	<b>100.0%</b>	<b>-48.0%</b>	<b>61.6%</b>

Melbourne had the highest volume contribution to direct tourism GRP in Victoria in 2021-22 at \$4.2 billion or 55.1%.

Regional Victoria contributed 44.9% of the state's direct tourism GRP, or \$3.4 billion.

The non-metropolitan tourism regions that contributed the most (\$ volume) to Victoria's direct tourism GRP were:

- Great Ocean Road (\$440 million or 5.8% of direct tourism GRP).
- Gippsland (\$413 million or 5.5% of direct tourism GRP).
- Victoria's High Country (\$411 million or 5.4% of direct tourism GRP).
- Murray (\$383 million or 5.1% of direct tourism GRP).

- The beginning of Victoria's tourism recovery is reflected in the strong growth rates noted in direct GRP in 2021-22 compared to 2020-21 for all tourism regions. Melbourne recorded significant growth of 76.0% compared to the peak of the pandemic in 2020-21. Strong year-on-year growth was noted in Victoria's High Country (+73.5%), Geelong and the Bellarine (+70.6%) and Goldfields (+53.3%).
- However, when compared against the pre-pandemic period, direct GRP remains below 2018-19 levels for all Victorian regions due to the negative impacts of COVID-19. Melbourne noted the largest decline in direct GRP of 57.3% in 2021-22 compared to 2018-19 estimates, due to the impact of restrictions. Regional Victoria also recorded a significant decrease of 28.9% in 2021-22 compared to 2018-19, below the rate of decline recorded in Melbourne.
- Large declines were also noted in Mornington Peninsula (-37.4%), Murray (-35.4%), Victoria's High Country (-34.3%), Yarra Valley and Dandenong Ranges (-31.7%) and Geelong and the Bellarine (-31.4%).



# Regional Tourism Satellite Account 2021-22

## Regional Contribution to Tourism Filled Jobs

### Direct tourism filled jobs by region

Rank #	Region	Filled Jobs (000s)	Jobs share of VIC (%)	% change 2018-19 vs 2021-22	% change 2020-21 vs 2021-22
1	Melbourne	46.8	38.4%	-53.9%	80.9%
2	Great Ocean Road	9.9	8.1%	-6.2%	34.6%
3	Gippsland	9.5	7.8%	4.8%	35.6%
4	Victoria's High Country	9.4	7.7%	-20.0%	73.4%
5	Murray	9.2	7.6%	-22.7%	35.1%
6	Mornington Peninsula	7.2	5.9%	-27.2%	29.8%
7	Goldfields	7.0	5.8%	-21.9%	53.3%
8	Geelong and the Bellarine	6.4	5.3%	-19.2%	66.0%
9	Yarra Valley and Dandenong Ranges	4.3	3.6%	-27.6%	43.0%
10	Phillip Island	4.2	3.5%	-12.5%	40.7%
11	Grampians	4.1	3.3%	2.1%	35.5%
12	Daylesford and the Macedon Ranges	3.8	3.1%	-16.9%	36.2%
	<b>Regional Victoria (total)</b>	<b>75.1</b>	<b>61.6%</b>	<b>-16.1%</b>	<b>43.2%</b>
	<b>Victoria (total)</b>	<b>121.9</b>	<b>100.0%</b>	<b>-36.2%</b>	<b>55.7%</b>

In 2021-22, the non-metropolitan regions that contributed the most (number of filled jobs) to Victoria's direct tourism filled jobs were:

- Great Ocean Road (9,900 jobs or 8.1% of direct tourism filled jobs).
- Gippsland (9,500 jobs or 7.8% of direct tourism filled jobs).
- Victoria's High Country (9,400 jobs or 7.7% of direct tourism filled jobs).
- Murray (9,200 jobs or 7.6% of direct tourism filled jobs).

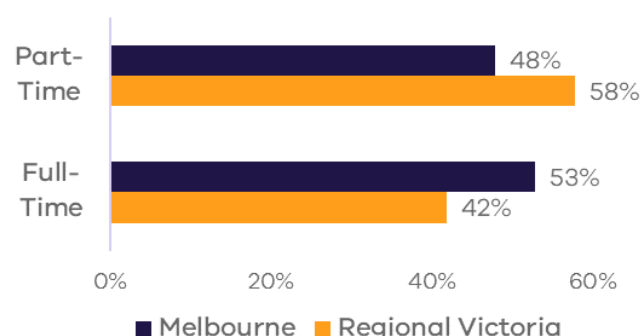
- As the sector started to recover in 2021-22, strong growth in direct tourism filled jobs was noted compared to 2020-21. Melbourne noted a significant rebound in direct filled jobs growth of 80.9%, with very strong growth also noted in Victoria's High Country (+73.4%), Geelong and the Bellarine (+66.0%) and Goldfields (+53.3%).
- However, the impact of COVID-19 is evident in these results for 2021-22, with most regions still below their pre-pandemic job levels, with the exception of Gippsland (+4.8%) and Grampians (+2.1%) which recorded more direct tourism filled jobs than in 2018-19. In comparison, the largest declines in direct tourism jobs compared to the 2018-19 estimates were noted in Yarra Valley and Dandenong Ranges (-27.6%), Mornington Peninsula (-27.2%), Murray (-22.7%) and Goldfields (-21.9%).
- Regional Victoria contributed more direct tourism jobs to the state than Melbourne (61.6% of the state's direct tourism filled jobs, or 75,100 jobs in 2021-22), which declined 16.1% compared to 2018-19.
- Melbourne contributed 38.4% of the state's direct tourism filled jobs, or 46,800 jobs in 2021-22, and recorded a very large decline of 53.9% compared to 2018-19, more than triple the rate of decline in direct jobs noted in regional Victoria (-16.1%).

## Full-time/Part-time Tourism Filled Jobs

### Direct tourism filled jobs

- The proportion of full-time jobs was highest in Melbourne (53% of direct tourism jobs), reflecting the high concentration of tourism consumption in sectors such as transport which often demand full-time workers.
- In regional Victoria, 42% of tourism employees were in full-time jobs and 58% in part-time filled jobs. The higher proportion of part-time filled jobs in regional Victoria reflects strong tourism consumption in sectors such as food, accommodation and retail, which have a higher demand for part-time employees.

Figure 6. Full-time /Part-time Tourism filled jobs



# Regional Tourism Satellite Account 2021-22

## Direct Tourism Filled Jobs by Industry

- Cafes, restaurants and take-away food services contributed the most to direct tourism filled jobs in Victoria in 2021-22, with a 33.2% share of direct tourism filled jobs in Melbourne and a 45.5% share in regional Victoria.
- Melbourne's other top industry contributors to direct tourism filled jobs included retail trade (18.2%), accommodation (10.5%), air water and other transport (7.8%) and clubs, pubs, taverns and bars (7.4%).
- Regional Victoria's other top industry contributors to direct tourism filled jobs were accommodation (16.5%), retail trade (14.6%) and clubs, pubs, taverns and bars (9.5%).
- The rebound in tourism activity in Melbourne in 2021-22 is reflected in direct filled jobs estimates which increased across all industries compared to 2020-21 (up 81.5% overall).
- Direct filled jobs in education training were almost 20 times the level recorded in 2020-21, reflecting the return of international students. Very high annual increases also noted in other sports and recreation services (+133.8%), accommodation (+133.1%) and rail transport (+117.5%).
- All industry categories in regional Victoria also noted very large increases in filled jobs in 2021-22 compared to the 2020-21 estimates, reflecting the start of recovery. The highest year-on-year increase was noted in education and training (+407.7%), other sports and recreation services (+113.3%), casinos and other gambling services (+86.9%) and cultural services (+77.9%).
- However, direct tourism filled jobs in Melbourne remained 54.0% below the 2018-19 data. The largest rates of decline in Melbourne compared to pre-pandemic estimates by industry were noted in education and training services (-84.9%), road transport and transport equipment rental (-63.7%), accommodation (-58.5%), casinos and other gambling services (-58.5%) and travel agency/ tour operator services (-50.7%).
- Overall direct tourism filled jobs in regional Victoria noted a much lower rate of decline than Melbourne (-16.7%) in 2021-22 compared to 2018-19, supported by strong intrastate travel to regional Victoria.
- The largest declines in direct tourism filled jobs by industry in regional Victoria were noted in education and training services (-80.9%), road transport and transport equipment rental (-51.1%), casinos and other gambling services (-39.6%), travel agency/ tour operator services (-39.0%) and air, water and other transport (-30.4%). Direct filled jobs in regional Victoria did increase marginally in accommodation (+0.8%) compared to 2018-19.

Refer to [data table](#) for further information.

# Regional Tourism Satellite Account 2021-22

## Data tables

### Key indicators Of Tourism's Total Contribution To Victoria's Tourism Regions 2021-22

Tourism Region	GRP		GVA		Filled Jobs	
	(\$M)	Share of economy (%)	(\$M)	Share of economy (%)	('000)	Share of economy (%)
<b>Direct tourism contribution</b>						
Melbourne	\$ 4,165	1.1%	\$ 3,814	1.0%	46.8	1.8%
Daylesford and the Macedon Ranges	\$ 134	3.7%	\$ 124	3.6%	3.8	11.0%
Geelong and the Bellarine	\$ 335	2.1%	\$ 309	2.1%	6.4	4.7%
Gippsland	\$ 413	2.5%	\$ 377	2.5%	9.5	7.7%
Goldfields	\$ 368	2.1%	\$ 340	2.1%	7.0	4.7%
Grampians	\$ 143	2.3%	\$ 129	2.3%	4.1	8.5%
Great Ocean Road	\$ 440	4.6%	\$ 398	4.5%	9.9	13.1%
Mornington Peninsula	\$ 368	2.6%	\$ 339	2.6%	7.2	5.6%
Murray	\$ 383	1.9%	\$ 348	1.9%	9.2	5.5%
Phillip Island	\$ 191	13.2%	\$ 173	12.9%	4.2	30.8%
Victoria's High Country	\$ 411	6.8%	\$ 369	6.5%	9.4	17.8%
Yarra Valley and Dandenong Ranges	\$ 206	1.9%	\$ 192	1.9%	4.3	4.1%
<b>Regional Victoria</b>	<b>\$ 3,392</b>	<b>2.8%</b>	<b>\$ 3,097</b>	<b>2.7%</b>	<b>75.1</b>	<b>7.3%</b>
<b>Victoria</b>	<b>\$ 7,557</b>	<b>1.5%</b>	<b>\$ 6,911</b>	<b>1.4%</b>	<b>121.9</b>	<b>3.3%</b>
<b>Indirect tourism contribution</b>						
Melbourne	\$ 3,718	0.9%	\$ 3,159	0.9%	21.3	0.8%
Daylesford and the Macedon Ranges	\$ 133	3.6%	\$ 113	3.3%	0.8	2.3%
Geelong and the Bellarine	\$ 350	2.2%	\$ 297	2.0%	2.1	1.5%
Gippsland	\$ 442	2.7%	\$ 375	2.5%	2.6	2.1%
Goldfields	\$ 401	2.3%	\$ 341	2.1%	2.4	1.6%
Grampians	\$ 143	2.3%	\$ 121	2.1%	0.9	1.8%
Great Ocean Road	\$ 486	5.1%	\$ 413	4.7%	2.9	3.9%
Mornington Peninsula	\$ 382	2.7%	\$ 325	2.5%	2.3	1.8%
Murray	\$ 416	2.1%	\$ 353	1.9%	2.5	1.5%
Phillip Island	\$ 197	13.6%	\$ 167	12.4%	1.2	8.5%
Victoria's High Country	\$ 437	7.2%	\$ 370	6.6%	2.6	4.9%
Yarra Valley and Dandenong Ranges	\$ 182	1.6%	\$ 154	1.5%	1.1	1.0%
<b>Regional Victoria</b>	<b>\$ 3,568</b>	<b>2.9%</b>	<b>\$ 3,030</b>	<b>2.7%</b>	<b>21.3</b>	<b>2.1%</b>
<b>Victoria (internal contribution only)<sup>1</sup></b>	<b>\$ 7,286</b>	<b>1.4%</b>	<b>\$ 6,189</b>	<b>1.3%</b>	<b>42.6</b>	<b>1.2%</b>
<i>Rest of Australia</i>	\$ 1,122	NA	\$ 951	NA	6.6	NA
<b>Victoria (reported STSA estimates)<sup>2</sup></b>	<b>\$ 8,408</b>	<b>1.6%</b>	<b>\$ 7,140</b>	<b>1.5%</b>	<b>49.2</b>	<b>1.3%</b>
<b>Total tourism contribution</b>						
Melbourne	\$ 7,882	2.0%	\$ 6,973	1.9%	68.1	2.6%
Daylesford and the Macedon Ranges	\$ 267	7.3%	\$ 237	7.0%	4.6	13.3%
Geelong and the Bellarine	\$ 685	4.2%	\$ 606	4.1%	8.5	6.2%
Gippsland	\$ 855	5.2%	\$ 752	4.9%	12.1	9.8%
Goldfields	\$ 769	4.4%	\$ 681	4.2%	9.4	6.4%
Grampians	\$ 286	4.7%	\$ 250	4.4%	4.9	10.3%
Great Ocean Road	\$ 926	9.7%	\$ 811	9.2%	12.8	17.0%
Mornington Peninsula	\$ 750	5.4%	\$ 663	5.1%	9.5	7.4%
Murray	\$ 799	4.0%	\$ 701	3.8%	11.7	7.0%
Phillip Island	\$ 388	26.8%	\$ 340	25.3%	5.4	39.3%
Victoria's High Country	\$ 847	13.9%	\$ 739	13.1%	12.0	22.7%
Yarra Valley and Dandenong Ranges	\$ 388	3.5%	\$ 346	3.4%	5.4	5.2%
<b>Regional Victoria</b>	<b>\$ 6,960</b>	<b>5.7%</b>	<b>\$ 6,127</b>	<b>5.4%</b>	<b>96.4</b>	<b>9.3%</b>
<b>Victoria (internal contribution only)<sup>1</sup></b>	<b>\$ 14,843</b>	<b>2.9%</b>	<b>\$ 13,100</b>	<b>2.7%</b>	<b>164.5</b>	<b>4.5%</b>
<i>Rest of Australia</i>	\$ 1,122	NA	\$ 951	NA	6.6	NA
<b>Victoria (reported STSA estimates)<sup>2</sup></b>	<b>\$ 15,964</b>	<b>3.1%</b>	<b>\$ 14,051</b>	<b>2.9%</b>	<b>171.1</b>	<b>4.7%</b>

#### Notes on the data

<sup>1</sup> A small portion of the indirect contribution of tourism is allocated to the 'rest of Australia' where the economic benefits of visitor spend in Victoria flow to other states and territories (e.g. where a tourism business in Victoria uses interstate suppliers). The larger, remaining portion of the indirect contribution of tourism represents the economic benefits to and within Victoria.

<sup>2</sup> These estimates may differ from the previously published data.

This release contains major revisions to the employment time-series due to the adoption of 'filled jobs' from the Labour Account from 'employed persons' based on the Labour Force survey which was used in previous releases. Data has been back-cast to measure like-for-like growth changes.

These estimates reflect the regional boundary definitions as noted in 2021-22.

# Regional Tourism Satellite Account 2021-22

## Data tables

### Consumption by Visitor Category: Melbourne, Regional Victoria and Victoria

Consumption by Visitor Category	Melbourne			Regional Victoria			Victoria		
	2021-22 (\$ M)	Change on 2018-19	2021-22 % share	2021-22 (\$ M)	Change on 2018-19	2021-22 % share	2021-22 (\$ M)	Change on 2018-19	2021-22 % share
International Overnight	\$1,825	-81.8%	21.6%	\$50	-93.7%	0.4%	\$1,875	-82.7%	9.2%
Interstate Overnight	\$3,033	-53.6%	35.9%	\$1,070	-42.7%	9.0%	\$4,103	-51.2%	20.1%
Intrastate Overnight	\$1,588	-31.0%	18.8%	\$7,331	-10.1%	61.4%	\$8,920	-14.7%	43.7%
Daytrips	\$2,015	-21.0%	23.8%	\$3,494	-12.5%	29.2%	\$5,509	-15.8%	27.0%
<b>Total</b>	<b>\$8,461</b>	<b>-60.5%</b>	<b>100%</b>	<b>\$11,946</b>	<b>-19.3%</b>	<b>100%</b>	<b>\$20,406</b>	<b>-43.6%</b>	<b>100%</b>

### Industry Direct GVA: Melbourne, Regional Victoria and Victoria

Industry Share of Direct Tourism GVA	Melbourne				Regional Victoria				Victoria			
	2020-21 (\$ M)	2021-22 (\$ M)	Change on 2018-19	Change on 2020-21	2020-21 (\$ M)	2021-22 (\$ M)	Change on 2018-19	Change on 2020-21	2020-21 (\$ M)	2021-22 (\$ M)	Change on 2018-19	Change on 2020-21
Accommodation	\$859	\$1,078	-37.3%	25.6%	\$579	\$701	-4.5%	21.0%	\$1,438	\$1,779	-27.5%	23.7%
Food Services	\$425	\$665	-47.1%	56.5%	\$710	\$908	-13.4%	27.8%	\$1,136	\$1,573	-31.8%	38.5%
Transport	\$190	\$483	-71.8%	154.4%	\$120	\$262	-60.5%	118.5%	\$310	\$745	-68.7%	140.5%
Travel agency and tour operator services	\$91	\$261	-68.5%	185.3%	\$94	\$208	-60.4%	121.6%	\$185	\$469	-65.4%	153.0%
Education and training	\$16	\$275	-82.0%	1655.0%	\$17	\$66	-78.4%	301.7%	\$32	\$342	-81.4%	960.6%
Retail Trade	\$365	\$600	-41.1%	64.4%	\$457	\$623	-3.9%	36.3%	\$822	\$1,223	-26.7%	48.8%
Recreational Activities	\$123	\$263	-40.2%	114.1%	\$99	\$197	-14.4%	97.8%	\$222	\$460	-31.4%	106.8%
All other industries	\$114	\$188	-61.2%	64.4%	\$90	\$132	-44.9%	46.8%	\$205	\$321	-55.8%	56.6%
<b>Total</b>	<b>\$2,183</b>	<b>\$3,814</b>	<b>-57.6%</b>	<b>74.7%</b>	<b>\$2,167</b>	<b>\$3,097</b>	<b>-29.6%</b>	<b>42.9%</b>	<b>\$4,350</b>	<b>\$6,911</b>	<b>-48.4%</b>	<b>58.9%</b>

#### Notes on the data

These estimates may differ from the previously published data in the previous Regional Tourism Satellite Accounts, by Tourism Research Australia.

Source: Regional Tourism Satellite Accounts 2021-22, Tourism Research Australia, Canberra, July 2023.

# Regional Tourism Satellite Account 2021-22

## Data tables

### Direct full-time and part-time split of direct tourism filled jobs

Melbourne						
Industry	Full-Time ('000)	Part-Time ('000)	Total Filled		Change on 2018-19 (total)	Change on 2020-21 (total)
			Jobs ('000)	Share (%)		
Cafes, restaurants and takeaway food services	5.5	10.1	15.6	33.2%	-42.2%	62.5%
Retail trade	4.8	3.8	8.5	18.2%	-49.1%	58.1%
Accommodation	3.0	2.0	4.9	10.5%	-58.5%	133.1%
Air, water and other transport	2.9	0.8	3.6	7.8%	-48.7%	53.3%
Clubs, pubs, taverns and bars	1.5	1.9	3.5	7.4%	-51.4%	73.2%
Other sports and recreation services	1.3	1.6	2.9	6.2%	-29.7%	133.8%
Travel agency and tour operator services	2.1	0.5	2.6	5.6%	-50.7%	87.8%
Education and training	1.5	0.9	2.4	5.1%	-84.9%	1832.7%
All other industries	0.9	0.2	1.1	2.4%	-64.3%	58.8%
Cultural services	0.5	0.3	0.8	1.8%	-43.1%	102.1%
Road transport and transport equipment rental	0.3	0.1	0.4	0.8%	-63.7%	54.5%
Casinos and other gambling services	0.2	0.1	0.3	0.7%	-58.5%	103.9%
Rail transport	0.1	0.0	0.1	0.3%	-36.6%	117.5%
<b>Direct tourism employment</b>	<b>24.7</b>	<b>22.4</b>	<b>46.8</b>	<b>100.0%</b>	<b>-54.0%</b>	<b>81.5%</b>

Regional Victoria						
Industry	Full-Time ('000)	Part-Time ('000)	Total Filled		Change on 2018-19 (total)	Change on 2020-21 (total)
			Jobs ('000)	Share (%)		
Cafes, restaurants and takeaway food services	10.6	23.6	34.1	45.5%	-7.2%	35.3%
Accommodation	6.2	6.2	12.4	16.5%	0.8%	57.0%
Retail trade	5.4	5.5	11.0	14.6%	-21.8%	38.8%
Clubs, pubs, taverns and bars	2.9	4.2	7.1	9.5%	-14.8%	32.1%
Other sports and recreation services	1.3	1.6	2.9	3.9%	-11.4%	113.3%
Travel agency and tour operator services	1.4	0.7	2.2	2.9%	-39.0%	44.5%
Air, water and other transport	1.6	0.6	2.2	2.9%	-30.4%	41.6%
All other industries	0.7	0.3	1.0	1.3%	-50.3%	41.3%
Education and training	0.5	0.4	0.9	1.2%	-80.9%	407.7%
Cultural services	0.5	0.4	0.9	1.2%	-23.8%	77.9%
Road transport and transport equipment rental	0.2	0.1	0.3	0.4%	-51.1%	26.2%
Casinos and other gambling services	0.0	0.0	0.1	0.1%	-39.6%	86.9%
Rail transport	0.0	0.0	0.1	0.1%	-22.1%	62.8%
<b>Direct tourism employment</b>	<b>31.4</b>	<b>43.4</b>	<b>75.1</b>	<b>100.0%</b>	<b>-16.7%</b>	<b>43.0%</b>

#### Notes on the data

These estimates may differ from the previously published data in the previous Regional Tourism Satellite Accounts, by Tourism Research Australia.

This release contains major revisions to the employment time-series due to the adoption of 'filled jobs' from the Labour Account from 'employed persons' based on the Labour Force survey which was used in previous releases. Data has been back-cast to measure like-for-like growth changes.

Source: Regional Tourism Satellite Accounts 2021-22, Tourism Research Australia, Canberra, July 2023.

More data tables are available [here](#)

# Regional Tourism Satellite Account 2021-22

## Data notes

### Victoria's Tourism Regions



To note: The 2021-22 RTSA estimates for these regions reflect the regional boundary definitions as noted in 2021-22.

Some regional boundaries changed in 2021 which are reflected in these 2021-22 estimates (High Country and Yarra Valley and Dandenong Ranges).

More information on the regions can be found at [Tourism Research Australia](https://www.tourismresearchaustralia.com.au).

## Methodology

The Regional Tourism Satellite Account (RTSA) estimates of the value of tourism to Victoria's tourism regions were produced by Tourism Research Australia.

Tourism Satellite Accounts (TSAs) are used to estimate the contribution of tourism to a region by combining the contributions of the various goods and services that make up the industry. The regional, state and national direct estimates are based on an internationally recognised and standardised framework (although this RTSA methodology has been extended to determine the indirect impact of cross region trade flows).

There are a number of steps required to calculate the tourism industry's contribution to regional Victorian economies. To start, a regional tourism consumption bundle is derived from TRA visitor survey data and adjusted to remove any price effects that are not directly attributed to the seller of the good or service (e.g. taxes, transport margins, pre-manufactured inputs, etc). The direct and indirect contributions of tourism are estimated by using regional input-output multiplier tables, derived from Australian Bureau of Statistics data.

## Major data revision - change in the approach to filled jobs metrics

The ABS "National TSA 2021-22" released in December 2022, included a change in their metric used for reporting filled jobs. The ABS, for the first time, reported tourism filled jobs (sourced from the Labour Account) instead of tourism filled jobs (sourced from the Labour Force Survey).

The ABS applied this change because tourism filled jobs provide a more meaningful measure of the tourism workforce. Importantly, tourism filled jobs captures the many secondary jobs that people have in the tourism sector and the highly casualised nature of work within the industry. For more details on changes please visit [TSA data](#).

In keeping with best practice, TRA has followed the lead of the ABS, by reporting tourism filled jobs in the 2021-22 editions of the State TSA and Regional TSA. This has seen the complete time series (2006-07 to 2021-22) revised from previous issues to report tourism filled jobs for all regions.

# Regional Tourism Satellite Account 2021-22

## Other revisions to time-series data

Revisions to the time-series have generated estimates which are different to the results produced in previous years and are not comparable to the previous series. This version takes into account a number of revisions in the input data.

Key revisions in this issue include changes to ABS National Accounts data and revisions to regional expenditure data (REX) by TRA.

- All results in this model have been calibrated back against the 2021-22 state TSA data for Victoria to ensure consistency.
- Historical data has been generated using the same methodology/ input data, to assess performance over time and ensure like-for-like comparisons.
- It is therefore important that these results are not compared to previously released regional TSA estimates. Results should also not be compared to alternative studies that are not based on the same methodology.
- Due to rounding effects, there may be small discrepancies when comparing outputs from the RTSA with the STSA, or in calculating totals from summing components of the RTSA.

## The approach to data smoothing of estimates for smaller regions

Underpinning the RSTA estimates is spend data from the International Visitor Survey (IVS) and National Visitor Survey (NVS). As some tourism regions do receive lower levels of visitation, the spend data from the IVS and NVS is very limited, making RTSA estimates less reliable. The lack of reliable data for these regions means:

- economic and filled jobs measures will be subject to more variability from year to year
- variability in these measures is more likely due to limitations in the data rather than any change in visitation to the region
- the underlying growth trend is more difficult to identify.

In the past TRA have addressed these issues by smoothing the data using a simple and consistent approach.

However given the unprecedented impacts of COVID-19 on the tourism industry in recent years **estimates for 2019-20, 2020-21 and 2021-22 have not been smoothed** acknowledging that COVID-related impacts in the would have seriously compromised the results.

Data up to and including 2018-19 has been smoothed for some smaller sub-regions in Victoria including Wimmera, Western Grampians, Macedon, Spa Country, Central Highlands, Yarra Valley and Dandenong Ranges and Murray East. For example, the smoothed GVA estimate for Wimmera for 2018-19 would be the average of the original estimates for GVA for 2016-17, 2017-18 and 2018-19.

For more detailed information on the data smoothing approach please visit [Tourism Research Australia](#).

## More Information

For more detail on the Regional Tourism Satellite Accounts 2021-22, published by Tourism Research Australia, refer to reports and excel data files at [Tourism Research Australia](#).

For more detail on the State Tourism Satellite Accounts 2021-22, published by Tourism Research Australia, refer to [Tourism Research Australia](#).

# Regional Tourism Satellite Account 2021-22

## Definitions

**Direct contribution of tourism:** The contribution generated by transactions between the visitor and producer for a good or service that involves a direct physical or economic relationship.

**Indirect contribution of tourism:** The subsequent flow-on effects created by the requirement for inputs from those industries supplying goods and services to visitors. For example, this might include the fresh produce supplied to a hotel and the electricity used.

**Tourism gross regional product (GRP):** Tourism GRP (the equivalent to Gross State Product (GSP) but at a regional level) is tourism GVA plus net taxes on products that are attributable to the tourism industry. As such GRP will generally have a higher value than GVA. Tourism GRP is a satellite accounting concept that enables direct comparison with the widely recognised national accounting aggregate, gross domestic product (or in this case gross regional product).

**Tourism gross value added (GVA):** Considered the most accurate measure of the contribution of the industry to the economy. It includes the total labour income and capital revenue received by the industry and the net taxes that government received from the production. This measure is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and can also be used for comparisons across countries.

**Filled jobs (employment metric used in current release):** Filled jobs refer to all positions of employment that are currently filled (including self-employment). Filled jobs can be measured from either household sources (such as the Labour Force Survey), or business sources (such as the Economic Activity Survey).

**Employed person (employment metric used in previous releases):** Is a person aged 15 years and over who worked for one hour or more per week for pay, profit, commission or payment in kind in a job or business, or on a farm; or worked for one hour or more without pay in a family business or on a farm.

**Tourism consumption:** The total value of goods and services consumed by domestic and international visitors in a region. It includes imputed non-market transactions such as estimated rental value of accommodation in self-owned holiday homes; cost to households of food and alcohol in hosting visiting friends and relatives;

**Tourism output:** The total value of goods and services produced in Australia to satisfy visitor consumption. It is measured in basic prices, so it excludes net taxes on tourism products.

**Tourism Industry Sectors for GVA:** Tourism characteristic industries are defined as those that would either cease to exist in their present form or be significantly affected if tourism were to cease. In the Australian TSA, for an industry to be a country-specific tourism characteristic industry, at least 25% of its output must be consumed by visitors. Tourism connected industries are those industries not classified as characteristic that have products that are consumed by visitors in volumes that are significant (e.g. Education and training). There are 17 different tourism-related industries that make up tourism, 15 of which have been grouped into tourism industry sectors, as displayed in the table below.

Tourism Industry Sector	Tourism Characteristic Industry	Tourism Connected Industry
Accommodation	Accommodation Ownership of dwellings	
Food services	Cafes, restaurants and takeaway food services Clubs, pubs restaurants and taverns	
Transport	Rail transport Taxi transport Other road transport Air, water and other transport Motor vehicle hiring	
Education and training		Education and training
Retail trade		Automotive fuel retailing Other retail trade
Recreational activities	Cultural services Casino and gambling services Other sports and recreation services	
<b>Other tourism industries</b>		
	Travel agency and tour operator services	
All other industries		



## Report produced by the Tourism and Events Research Unit

Department of Jobs, Skills, Industry and Regions  
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Data is considered correct at the time of publishing.  
Due care is taken in the production of this report, however DJSIR  
accepts no responsibility for use of this information.

Please contact: [research@ecodev.vic.gov.au](mailto:research@ecodev.vic.gov.au) with any queries.