

# Victoria's High Country

## 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 Victoria's High Country<sup>1</sup>. The region received approximately 3.7 million domestic (overnight and daytrip) visitors, who spent \$1.1 billion in the year ending December 2021.

### GROSS REGIONAL PRODUCT\*



GRP	% OF ECONOMY
\$755M ▼-34% y/y	17.1% ▼ -9.3%pts

### VALUE OF TOURISM

In 2019-20, tourism was estimated to be worth \$755 million to the region's economy (in direct and indirect Gross Regional Product), representing 17.1 per cent of the region's economy.

### TOURISM EMPLOYMENT\*



JOBS	% OF ECONOMY
10,200 ▼-24% y/y	23.4% ▼ -7.5%pts

Tourism generated employment of approximately 10,200 people or 23.4 per cent of the region's employment.

### DOMESTIC OVERNIGHT



SPEND	VISITORS
\$935M +122% y/y	1.9M +90% y/y
▼ -16% 2019/21	▼ -23% 2019/21

### DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Victoria's High Country in the year ending December 2021 was estimated to be \$935 million, up 122 per cent on 2020 during a period of low activity. However, overnight spend remained 16 per cent below the year ending December 2019 (pre-COVID) result. Visitors spent an average of \$162 per night and \$504 per visitor in 2021.

### DOMESTIC DAYTRIPS



SPEND	DAYTRIPS
\$202M +56% y/y	1.8M +18% y/y
▼ -26% 2019/21	▼ -37% 2019/21

### DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$202 million in the year ending December 2021, a decrease of 26 per cent compared to the year ending December 2019. However, daytrip spend was up 56 per cent on 2020 during a period of low activity.

\*The geographic definition for this tourism region varies between the Regional Tourism Satellite Account (RTSA) results (e.g. GRP and persons employed) and the National and International Visitor Surveys due to a change in the regional boundary definitions from January 2021. Refer back page for more information.

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: Mount Hotham



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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) (%)
<b>Gross Regional Product (GRP)</b>							
Direct GRP (\$m)	372	369	388	477	592	401	-32%
Indirect GRP (\$m)	347	340	357	457	546	354	-35%
<b>Total GRP (\$m)</b>	<b>719</b>	<b>709</b>	<b>745</b>	<b>935</b>	<b>1,138</b>	<b>755</b>	<b>-34%</b>
Direct GRP (%)	10.2%	10.1%	10.0%	11.7%	13.7%	9.1%	-4.6%pts
Indirect GRP (%)	9.5%	9.3%	9.2%	11.2%	12.6%	8.0%	-4.6%pts
<b>Total GRP (%)</b>	<b>19.8%</b>	<b>19.3%</b>	<b>19.1%</b>	<b>22.9%</b>	<b>26.3%</b>	<b>17.1%</b>	<b>-9.3%pts</b>
<b>Persons Employed</b>							
Direct Employment (000s)	7.1	6.8	7.2	8.9	10.1	8.1	-20%
Indirect Employment (000s)	2.0	2.0	2.0	2.6	3.2	2.1	-34%
<b>Total Employment (000s)</b>	<b>9.0</b>	<b>8.8</b>	<b>9.3</b>	<b>11.5</b>	<b>13.3</b>	<b>10.2</b>	<b>-24%</b>
Direct Employment (%)	18.6%	17.4%	17.8%	21.3%	23.5%	18.6%	-5.0%pts
Indirect Employment (%)	5.2%	5.0%	5.0%	6.3%	7.4%	4.8%	-2.6%pts
<b>Total Employment (%)</b>	<b>23.8%</b>	<b>22.4%</b>	<b>22.9%</b>	<b>27.6%</b>	<b>30.9%</b>	<b>23.4%</b>	<b>-7.5%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)	2,163	2,430	2,887	2,835	1,523	1,794	18%	-37%	49.1%
Overnight visitors (000's)	1,695	2,083	2,150	2,403	978	1,857	90%	-23%	50.9%
<b>Total domestic visitors (000's)</b>	<b>3,858</b>	<b>4,514</b>	<b>5,037</b>	<b>5,238</b>	<b>2,501</b>	<b>3,650</b>	<b>46%</b>	<b>-30%</b>	<b>100.0%</b>
Visitor nights (000's)	4,860	5,765	6,375	6,443	3,342	5,764	72%	-11%	100.0%
Length of stay (nights)	2.9	2.8	3.0	2.7	3.4	3.1			
Daytrip Expenditure (\$m)	178	228	301	272	129	202	56%	-26%	17.8%
Daytrip spend per trip	82	94	104	96	85	113			
Domestic Overnight Expenditure (\$m)	701	920	1,019	1,112	421	935	122%	-16%	82.2%
Domestic Overnight Spend per Visitor (\$)	414	442	474	463	431	504			
Domestic Overnight Spend per Night (\$)	144	160	160	173	126	162			
<b>Total Domestic Expenditure (\$m)</b>	<b>879</b>	<b>1,149</b>	<b>1,320</b>	<b>1,384</b>	<b>550</b>	<b>1,137</b>	<b>107%</b>	<b>-18%</b>	<b>100.0%</b>
<b>International</b>									
Overnight visitors (000's)	32	35	41	36	8	-	-	-	-
Visitor nights (000's)	463	488	528	362	-	-	-	-	-
Length of stay (nights)	14.6	13.8	12.7	10.1	-	-			
International Overnight Expenditure (\$m)	29	22	29	22	-	-	-	-	-
International Overnight Spend per Visitor (\$)	899	615	706	601	-	-			
International Overnight Spend per Night (\$)	62	45	55	60	-	-			

For year ending December 2021, international visitor data is currently limited to state-level results.

The geographic definition for this tourism region varies between the Regional Tourism Satellite Account results (e.g. GRP and persons employed) and the National and International Visitor Surveys due to a change in regional boundary definitions from January 2021. Refer back page for more information.

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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## <sup>1</sup>Victoria's High Country 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 Victoria's High Country tourism region (from January 2021):

Region	SA2
High Country	Alexandra, Beechworth, Benalla, Benalla Region, Bright - Mount Beauty, Chiltern - Indigo Valley, Kinglake, Mansfield, Myrtleford, Rutherglen, Towong, Wangaratta, Wangaratta Region, Yackandandah, Yea

## Changes to the geographic definition from January 2021

The following SA2s: Alexandra, Yea and Kinglake; representing Murrindindi Shire, have moved from Yarra Valley and Dandenong Ranges to the High Country tourism region. Survey data has been backcast to reflect the new regional definitions however the RTSA results for 2019-20 are based on previous geographic boundaries.

## 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. 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.