THE ECONOMIC CONTRIBUTION OF TOURISM TO VICTORIA'S REGIONS 2019-20

Results from the 2019-20 Regional Tourism Satellite Accounts, published by Tourism Research Australia

Released July 2021

Report produced by the Tourism, Events and Visitor Economy (TEVE) Research Unit

Department of Jobs, Precincts and Regions

Victorian Government

Regional Tourism Satellite Accounts

Victoria's Regions – Summary Results 2019-20

Tourism is a valuable contributor to Victoria's regional economies. However, the industry has recently been devastated by the adverse impacts of coronavirus (COVID-19). These results are for the 2019-20 financial year and incorporate a period (second half of 2019) before the disruption of coronavirus (COVID-19), therefore they do not reflect the full negative impacts of the pandemic on the industry.

In 2019-20 tourism was worth $7.4 billion to the regional Victoria economy (in GRP) and generated employment of 98,400 people. Tourism was worth $14.5 billion to Melbourne (in GRP) and generated employment of 125,300 people (directly and indirectly). Substantial losses were noted for most measures in these results reflecting the devastating initial impact of coronavirus (COVID-19) on the industry, which is still unfolding.

	2019-20	Change on 2018-19	2019-20	Change on 2018-19
Tourism GVA ($M)	**Melbourne**		**Regional Victoria**	
Direct	7,502	▼ -17.5%	3,625	▼ -19.4%
Indirect	5,756	▼ -22.4%	3,067	▼ -23.4%
Total tourism GVA	13,258	▼ -19.7%	6,692	▼ -21.3%
Total region GVA	337,278	▲ 1.7%	96,457	▲ 1.9%
Tourism's direct share of region GVA	2.2%	▼ -0.5% pts	3.8%	▼ -1.0% pts
Tourism GRP ($M)				
Direct	8,067	▼ -17.8%	3,963	▼ -19.6%
Indirect	6,477	▼ -22.3%	3,456	▼ -23.2%
Total tourism GRP	14,545	▼ -19.8%	7,419	▼ -21.3%
Total region GRP	363,826	▲ 2.9%	104,050	▲ 3.1%
Tourism's direct share of region GRP	2.2%	▼ -0.6% pts	3.8%	▼ -1.1% pts
Tourism Employment ('000 persons)				
Direct	88.6	▼ -7.4%	77.9	▼ -6.8%
Indirect	36.7	▼ -21.3%	20.5	▼ -21.6%
Total tourism employment	125.3	▼ -12.0%	98.4	▼ -10.3%
Total region employment	2,434.4	▲ 0.9%	955.0	▲ 0.9%
Tourism's direct share of region employment	3.6%	▼ -0.3% pts	8.2%	▼ -0.7% pts

Source: Tourism Research Australia's Regional TSA model 2019-20

HOW DO I READ THIS TABLE?

- In 2019-20, *direct* tourism GRP in Melbourne was worth $8.1 billion (-17.8 per cent compared to 2018-19). This was 2.2 per cent of the region's total direct GRP.
- *Indirect* tourism GRP was worth an extra $6.5 billion to Melbourne's economy.
- **So, in 2019-20, tourism (both direct and indirect) was worth $14.5 billion to Melbourne's economy.**

Note estimates are impacted by rounding.

What is **tourism consumption**?

- The total value of goods and services consumed by domestic and international visitors in Australia

What is **direct** contribution?

- Money spent directly in the tourism industry – without a tourism industry this money wouldn't be generated, or these people wouldn't be employed.

What is **indirect** contribution?

- The flow-on effect of the tourism industry. In Melbourne, every dollar spent in the tourism industry created additional value elsewhere in the economy.

Why do we use **GVA**?

- GVA allows easier comparisons across industries. GVA is equal to GDP/GRP minus taxes.

Regional Tourism Satellite Accounts

Melbourne and Regional Victoria - Key Results 2019-20

MELBOURNE	REGIONAL VICTORIA

Gross Regional Product (GRP)

Melbourne

- In 2019-20, total tourism GRP in Melbourne was worth $14.5 billion (direct and indirect), recording a significant decline of 19.8 per cent or down $3.6 billion compared to 2018-19 due to the impacts of coronavirus (COVID-19). Tourism GRP accounted for 4.0 per cent of Melbourne's total GRP (direct and indirect).
- In comparison, total GRP for the Melbourne economy overall grew marginally by 2.9 per cent in the period, reinforcing the disproportionate negative impact that coronavirus (COVID-19) has had on the tourism sector in Melbourne relative to the rest of the economy.

$14.5b ▼ **-19.8 per cent** from 2018-19

Regional Victoria

- In 2019-20, total tourism GRP in regional Victoria was worth $7.4 billion (direct and indirect), recording a substantial decline of 21.3 per cent (down $2.0 billion), higher than the rate of decline noted in Melbourne although less in volume terms. Tourism GRP accounted for 7.1 per cent of the region's total GRP.
- In contrast to the heavy fall in total tourism GRP noted in regional Victoria in 2019-20, total GRP in the regional economy overall increased by 3.1 per cent compared to 2018-19 estimates, illustrating the severity of the pandemic's impact on tourism.

$7.4b ▼ **-21.3 per cent** from 2018-19

Employment

Melbourne

- In 2019-20, tourism in Melbourne generated 125,300 jobs (direct and indirect) or 5.1 per cent of the region's total employment.
- Tourism jobs in Melbourne decreased by 12.0 per cent in 2019-20 reflecting the initial stages of the pandemic only, noting a decrease of approximately 17,000 jobs compared to 2018-19.
- Conversely, overall employment in the Melbourne economy grew marginally in the period, up 0.9 per cent from 2018-19 to 2019-20.

125.3k ▼ **-12.0 per cent** from 2018-19

Regional Victoria

- In 2019-20, tourism generated 98,400 jobs (direct and indirect) in regional Victoria, recording a double-digit decline of 10.3 per cent compared to revised 2018-19 estimates due to the initial impacts of coronavirus (COVID-19) on the sector, a decrease of approximately 11,300 jobs. Tourism contributed 10.3 per cent of total employment in regional Victoria. Approximately 44 per cent of all tourism jobs *within the state* are in regional Victoria.
- Overall employment in regional Victoria increased marginally by 0.9 per cent in 2019-20 compared to 2018-19 estimates, highlighting the more severe negative impacts of the pandemic on the tourism industry (i.e. tourism jobs declined by 10.3 per cent).

98.4k ▼ **-10.3 per cent** from 2018-19

Gross Value Added (GVA)

Melbourne

- In 2019-20, tourism was worth $13.3 billion in GVA. This was 3.9 per cent of the region's total GVA (direct and indirect).
- Tourism GVA in Melbourne declined by 19.7 per cent (down $3.2 billion) in 2019-20 compared to 2018-19 due to the negative impacts of coronavirus (COVID-19).
- In comparison, overall GVA in Melbourne's economy increased (+1.7 per cent) in the same period, illustrating that tourism has been more affected than other sectors of Melbourne's economy.

$13.3b ▲ **-19.7 per cent** from 2018-19

Regional Victoria

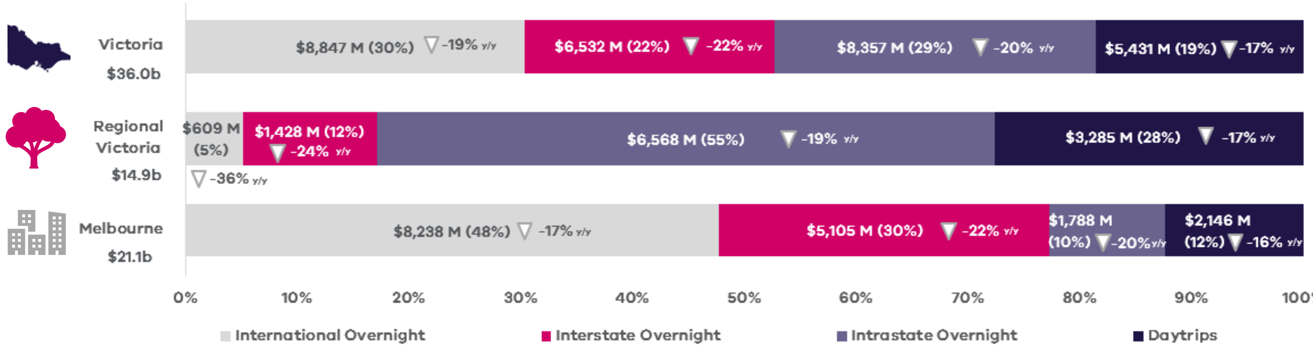
- In 2019-20, tourism GVA in regional Victoria was worth $6.7 billion (direct and indirect), recording a substantial decrease of 21.3 per cent from 2018-19 (down $1.8 billion), slightly bigger than the rate of decline in GVA noted in Melbourne although less in terms of volume. Tourism contributed 6.9 per cent to regional Victoria's overall GVA.
- Total economy wide GVA in regional Victoria grew 1.9 per cent in 2019-20 compared to 2018-19 estimates, in contrast to the large decline noted in tourism GVA in the period (-21.3 per cent).

$6.7b ▲ **-21.3 per cent** from 2018-19

2019-20 Regional Tourism Satellite Accounts

Tourism Consumption

Figure 1. Share of Regional Consumption by Visitor Segment



- During 2019-20 almost half (48 per cent) of tourism consumption in Melbourne was by international overnight visitors to the state, while these visitors accounted for only five per cent of tourism consumption in regional Victoria.
- International consumption in Melbourne declined by 17 per cent in 2019-20 compared to 2018-19, while international consumption in regional Victoria declined by 36 per cent (albeit from a smaller base).
- Interstate overnight visitors contributed 30 per cent of tourism consumption in Melbourne and 12 per cent in regional Victoria in 2019-20. Interstate consumption declined by 24 per cent in regional Victoria and 22 per cent in Melbourne compared to 2018-19 estimates.
- Intrastate overnight visitors travelling within Victoria accounted for more than half (55 per cent) of tourism consumption in regional Victoria during 2019-20, but accounted for only 10 per cent of tourism consumption in Melbourne.
- Intrastate consumption declined by 20 per cent in Melbourne in 2019-20 compared to the previous year, which was marginally larger than the rate of decline noted in regional Victoria (-19 per cent).
- Daytrips contributed 28 per cent of tourism consumption in regional Victoria and 12 per cent in Melbourne. Daytrip consumption declined by 17 per cent in 2019-20 in regional Victoria and 16 per cent in Melbourne compared to 2018-19 estimates.

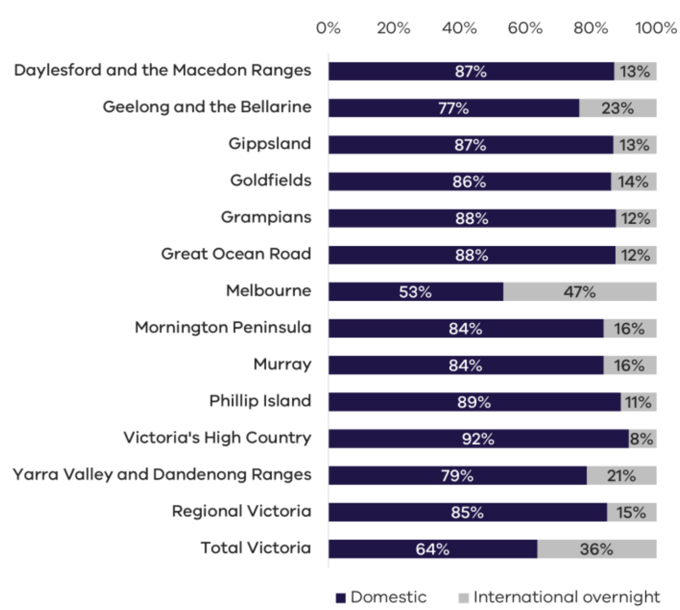
Refer to appendix D for relevant data table with further information.

Gross Value Added (GVA)

- In 2019-20, the non-metropolitan regions with the greatest proportion of direct GVA attributable to domestic (overnight and daytrip) visitors to/within Victoria were Victoria's High Country (92 per cent), Phillip Island (89 per cent), Grampians and Great Ocean Road (both 88 per cent), as well as Daylesford and the Macedon Ranges and Gippsland (both 87 per cent).
- In 2019-20, the non-metropolitan regions with the greatest proportion of direct GVA attributable to international overnight visitors to Victoria were Geelong and the Bellarine (23 per cent), Yarra Valley and Dandenong Ranges (21 per cent), Murray and Mornington Peninsula (16 per cent each). Overall, 85 per cent of regional Victoria's direct tourism GVA was attributable to domestic visitors, with 15 per cent attributable to international overnight visitors.
- Forty-seven per cent (47 per cent) of Melbourne's direct tourism GVA was attributable to international overnight visitors and 53 per cent to domestic visitors.

Notably, international borders into Australia were progressively closed from February 2020 due to coronavirus (COVID-19), which has impacted a period of these results (Feb to Jun 2020).

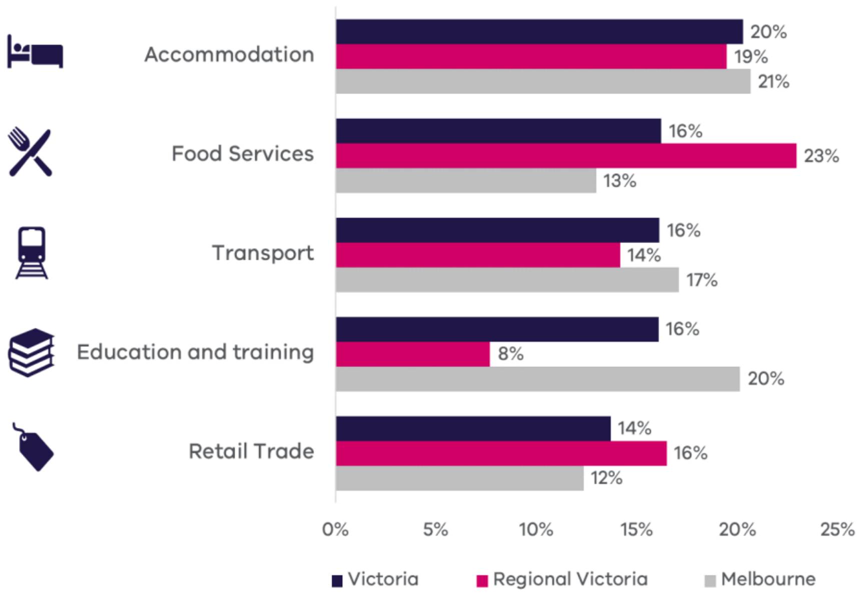
Figure 2. Share of Direct Regional Tourism GVA



2019-20 Regional Tourism Satellite Accounts

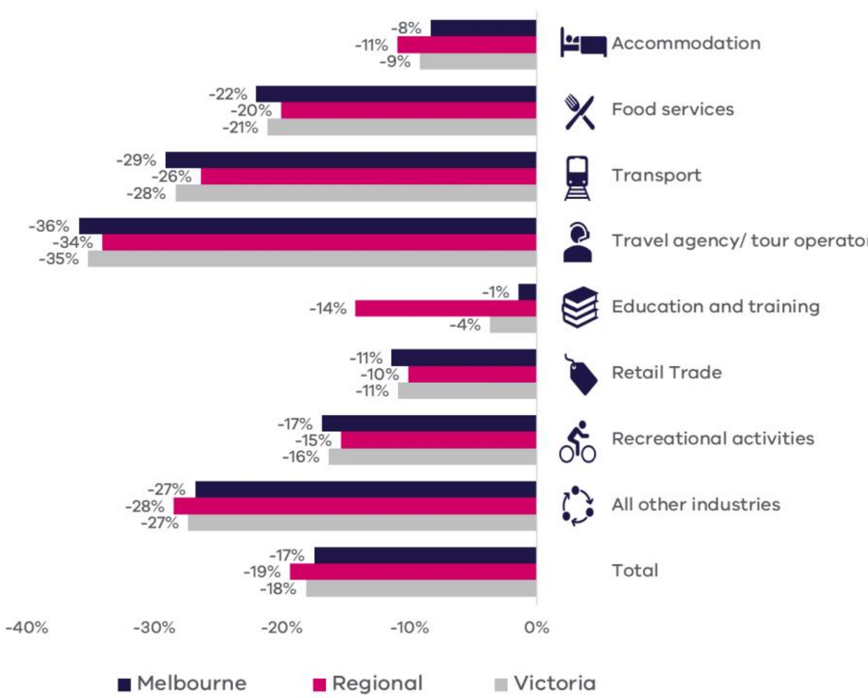
Direct Tourism GVA by Industry

Figure 3. 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 $2.3 billion, or 20 per cent of the state's direct tourism GVA.
- In regional Victoria, food services made the highest contribution to direct tourism GVA, at $831 million or 23 per cent of direct GVA.
- In Melbourne, accommodation (21 per cent) and education and training (20 per cent) made the greatest contribution to direct tourism GVA (both worth approximately $1.5 billion).

Figure 4. Direct Tourism GVA – % Change in Volume from 2018-19 to 2019-20



- In Melbourne the largest decreases in direct tourism GVA in 2019-20 compared to 2018-19 were noted in the travel agency/ tour operator services (-36 per cent), transport (-29 per cent), food services (-22 per cent), recreational activities (-17 per cent) and retail trade (-11 per cent) industries.
- In regional Victoria, similarly high declines were also noted in the travel agency/ tour operator services (-34 per cent), transport (-26 per cent), food services (-20 per cent), recreational activities (-15 per cent) and retail trade (-10 per cent) industries. Regional Victoria also noted double-digit declines in education and training (-14 per cent) and accommodation (-11 per cent) industries.
- In Victoria overall, high declines were also noted in in the travel agency/ tour operator services (-35 per cent), transport (-28 per cent), food services (-21 per cent), recreational activities (-16 per cent) and retail trade (-11 per cent) sectors.
- High declines were also noted across Victoria in all other industries (-27 per cent).

**Note: see 'Appendix B – Notes' for aggregated industry sector definitions.*

Refer to appendix D for relevant data table with further information.

2019-20 Regional Tourism Satellite Accounts

Significance of Tourism to Victoria's Regions

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

	Tourism Region	GRP	GVA	Jobs
1	Phillip Island	16.6%	16.3%	29.9%
2	Victoria's High Country	9.1%	8.8%	18.6%
3	Great Ocean Road	6.8%	6.6%	14.1%
4	Daylesford and the Macedon Ranges	4.6%	4.6%	12.2%
5	Mornington Peninsula	3.8%	3.8%	7.1%
6	Grampians	3.2%	3.2%	8.7%
7	Gippsland	3.2%	3.1%	7.8%
8	Murray	3.1%	3.1%	7.0%
9	Yarra Valley and Dandenong Ranges	3.1%	3.1%	6.0%
10	Geelong and the Bellarine	2.9%	2.8%	5.5%
11	Goldfields	2.5%	2.5%	5.3%
12	Melbourne	2.2%	2.2%	3.6%
	Regional Victoria	**3.8%**	**3.8%**	**8.2%**
	Total Victoria	**2.6%**	**2.6%**	**4.9%**

- The regions that are most reliant on tourism are more vulnerable during a crisis such as the coronavirus (COVID-19) pandemic or bushfires. Phillip Island is the tourism region with the greatest reliance on tourism in Victoria. For Phillip Island, tourism represents 16.6 per cent of direct GRP, 16.3 per cent of direct GVA and 29.9 per cent of direct employment in the region.
- Victoria's High Country is the tourism region with the second highest reliance on tourism, with tourism representing 9.1 per cent of direct GRP, 8.8 per cent of direct GVA and 18.6 per cent of direct employment in the region.
- Melbourne is the region least reliant on tourism, with tourism representing 2.2 per cent of direct GRP, 2.2 per cent of direct GVA and 3.6 per cent of direct employment.

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 2019-20
1	Melbourne	8,067	67.1%	-17.8%
2	Murray	519	4.3%	-15.3%
3	Great Ocean Road	507	4.2%	-13.9%
4	Mornington Peninsula	475	3.9%	-19.8%
5	Gippsland	440	3.7%	-9.6%
6	Geelong and the Bellarine	415	3.5%	-15.7%
7	Victoria's High Country	401	3.3%	-32.2%
8	Goldfields	394	3.3%	-24.7%
9	Yarra Valley and Dandenong Ranges	317	2.6%	-26.5%
10	Phillip Island	206	1.7%	-27.3%
11	Grampians	148	1.2%	-6.8%
12	Daylesford and the Macedon Ranges	142	1.2%	-16.1%
	Regional Victoria (total)	**3,963**	**32.9%**	**-19.6%**
	Victoria (total)	**12,030**	**100.0%**	**-18.4%**

- The non-metropolitan regions that contributed the most ($ volume) to Victoria's direct tourism GRP were:
  - Murray ($519 million or 4.3 per cent of direct tourism GRP).
  - Great Ocean Road ($507 million or 4.2 per cent of direct tourism GRP).
  - Mornington Peninsula ($475 million or 3.9 per cent of direct tourism GRP).
  - Gippsland ($440 million or 3.7 per cent of direct tourism GRP).
- Direct GRP has fallen for all Victorian regions in 2019-20 compared to the previous year due the negative impacts of coronavirus (COVID-19). The highest decline in direct tourism GRP compared to the 2018-19 estimates was noted in Victoria's High Country (-32.2 per cent), which was also negatively impacted by the 2019/20 summer bushfires. This was followed by Phillip Island (-27.3 per cent), Yarra Valley and Dandenong Ranges (-26.5 per cent) and Goldfields (-24.7 per cent).

- Melbourne contributed 67.1 per cent of the state's direct tourism GRP, or $8.1 billion. Melbourne noted a large decline in direct GRP of 17.8 per cent in 2019-20 compared to 2018-19 estimates.
- Regional Victoria contributed 32.9 per cent of the state's direct tourism GRP, or $4.0 billion. Regional Victoria also recorded a significant decrease of 19.6 per cent in 2019-20 compared to 2018-19, which was larger than the rate of decline for direct GRP recorded in Melbourne.

2019-20 Regional Tourism Satellite Accounts

Regional Contribution to Tourism Employment

Direct Employment by Region

Rank #	Region	Jobs (000s)	Jobs share of VIC (%)	% change 2018-19 vs 2019-20
1	Melbourne	88.6	53.2%	-7.4%
2	Murray	10.8	6.5%	-2.5%
3	Great Ocean Road	9.8	5.9%	0.0%
4	Gippsland	8.9	5.4%	6.5%
5	Mornington Peninsula	8.4	5.0%	-7.4%
6	Victoria's High Country	8.1	4.8%	-20.5%
7	Goldfields	7.3	4.4%	-13.3%
8	Geelong and the Bellarine	7.0	4.2%	-3.2%
9	Yarra Valley and Dandenong Ranges	6.2	3.7%	-14.2%
10	Daylesford and the Macedon Ranges	3.9	2.3%	-7.3%
11	Grampians	3.8	2.3%	5.0%
12	Phillip Island	3.8	2.3%	-15.3%
	Regional Victoria (total)	**77.9**	**46.8%**	**-6.8%**
	Victoria (total)	**166.5**	**100.0%**	**-7.1%**

In 2019-20, the non-metropolitan regions that contributed the most (number of employed persons) to Victoria's direct tourism employment were:

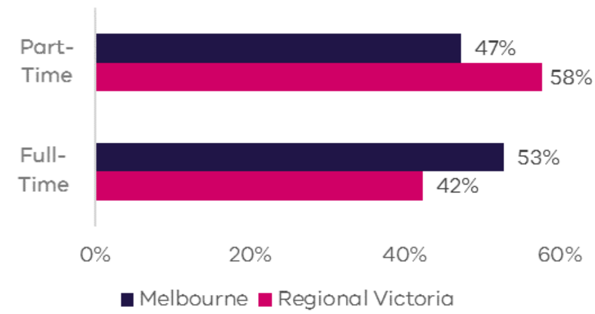
- Murray (10,800 jobs or 6.5 per cent of direct tourism employment).
- Great Ocean Road (9,800 jobs or 5.9 per cent of direct tourism employment).
- Gippsland (8,900 jobs or 5.4 per cent of direct tourism employment).
- Mornington Peninsula (8,400 jobs or 5.0 per cent of direct tourism employment).

- The devastating impacts of coronavirus (COVID-19) have negatively impacted direct tourism employment in most regions in Victoria. The highest decline in direct tourism jobs compared to the 2018-19 estimates was noted in Victoria's High Country (-20.5 per cent), which was also severely impacted by the 2019/20 summer bushfires.
- Phillip Island also recorded a large decline in tourism jobs (-15.3 per cent). Notably, Philip Island has the highest reliance on tourism as a source of employment of all regions in Victoria (29.9 per cent), reinforcing the negative impacts of the pandemic on jobs in the region.
- Yarra Valley and Dandenong Ranges (-14.2 per cent) and Goldfields (-13.3 per cent) also suffered double-digit declines compared to 2018-19.
- Despite the adverse impacts of coronavirus (COVID-19) some regions noted an increase in employment compared to the revised 2018-19 estimates. This included Gippsland (+6.5 per cent) and Grampians (+5.0 per cent) suggesting the early impacts of the pandemic was yet to translate into job losses in those regions.
- Regional Victoria contributed 46.8 per cent of the state's direct tourism employment, or 77,900 jobs in 2019-20, which declined 6.8 per cent compared to 2018-19.
- Melbourne contributed 53.2 per cent of the state's direct tourism employment, or 88,600 jobs in 2019-20, and recorded a decline of 7.4 per cent compared to 2018-19, higher than the rate of decline in jobs noted in regional Victoria.

Direct Tourism Employment - Full-time/Part-time

- The proportion of full-time jobs was highest in Melbourne (53 per cent of direct tourism jobs), reflecting the high concentration of tourism consumption in the education and transport sectors, which often demand full-time workers.
- In regional Victoria, 42 per cent of tourism employees were in full-time jobs and 58 per cent in part-time employment. The higher proportion of part-time employment 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 5. Full-time /Part-time Tourism Employment



Direct Tourism Employment by Industry

- Cafes, restaurants and take-away food services contributed the most to direct tourism employment in Victoria in 2019-20, with a 24.1 per cent share of direct tourism employment in Melbourne and a 38.7 per cent share in regional Victoria.
- Melbourne's other top industry contributors to direct tourism employment included retail trade (15.7 per cent), education and training (15.0 per cent) and accommodation (11.9 per cent).
- Regional Victoria's other top industry contributors to direct tourism employment included retail trade (15.1 per cent), accommodation (14.7 per cent) and clubs, pubs, taverns and bars (7.2 per cent).
- In Melbourne the industries to suffer the largest declines in direct tourism employment in 2019-20 compared to 2018-19 were travel agency/ tour operator services (-23.3 per cent), road transport/ transport equipment rental (-15.6 per cent), rail transport (-14.4 per cent), clubs, pubs, taverns and bars (-14.3 per cent) and sports and recreation services (-12.3 per cent). Overall direct tourism employment in Melbourne declined by 7.4 per cent year-on-year.
- Regional Victoria recorded similarly high categories of decline, with overall direct tourism employment down 6.8 per cent in 2019-20 compared to 2018-19, slightly softer than the rate of decline noted in Melbourne. The largest falls in direct tourism employment were noted in the travel agency/ tour operator services (-22.0 per cent), road transport/ transport equipment rental and sports/ recreation services (both -13.5 per cent), education and training (-11.5 per cent) and clubs, pubs, taverns and bars (-10.5 per cent) industries.

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

	Melbourne				
Industry	Full-Time ('000)	Part-Time ('000)	Total ('000)	Share (%)	Change on 2018-19 (total)
Cafes, restaurants and takeaway food services	7.5	13.9	21.4	24.1%	-5.0%
Retail trade	6.5	7.5	13.9	15.7%	-8.6%
Education and training	7.8	5.5	13.3	15.0%	1.6%
Accommodation	6.0	4.5	10.6	11.9%	-9.7%
Air, water and other transport	4.8	1.7	6.5	7.3%	-2.6%
Travel agency and tour operator services	3.8	1.3	5.1	5.8%	-23.3%
Clubs, pubs, taverns and bars	2.0	2.5	4.6	5.2%	-14.3%
Other sports and recreation services	1.6	2.0	3.7	4.1%	-12.3%
Road transport and transport equipment rental	2.5	0.7	3.2	3.6%	-15.6%
All other industries	2.0	0.8	2.8	3.1%	-5.6%
Cultural services	1.5	1.2	2.7	3.1%	3.6%
Casinos and other gambling services	0.4	0.2	0.6	0.6%	-0.4%
Rail transport	0.3	0.0	0.3	0.4%	-14.4%
Direct tourism employment	**46.7**	**41.9**	**88.6**	**100.0%**	**-7.4%**

	Regional Victoria				
Industry	Full-Time ('000)	Part-Time ('000)	Total ('000)	Share (%)	Change on 2018-19 (total)
Cafes, restaurants and takeaway food services	9.3	20.8	30.1	38.7%	-2.1%
Retail trade	4.7	7.0	11.8	15.1%	-8.0%
Accommodation	5.4	6.1	11.5	14.7%	-8.8%
Clubs, pubs, taverns and bars	2.3	3.4	5.6	7.2%	-10.5%
Education and training	2.0	1.6	3.6	4.6%	-11.5%
Travel agency and tour operator services	2.0	1.3	3.4	4.3%	-22.0%
Air, water and other transport	2.0	0.9	2.9	3.7%	-0.3%
Other sports and recreation services	1.3	1.6	2.8	3.6%	-13.5%
Cultural services	1.2	1.0	2.1	2.7%	4.1%
Road transport and transport equipment rental	1.5	0.5	2.1	2.7%	-13.5%
All other industries	1.1	0.7	1.8	2.3%	-5.1%
Casinos and other gambling services	0.0	0.1	0.1	0.1%	-0.4%
Rail transport	0.1	0.0	0.1	0.1%	-8.4%
Direct tourism employment	**32.9**	**45.0**	**77.9**	**100.0%**	**-6.8%**

Appendix A – Victoria's Tourism Regions

To note: The 2019-20 RTSA estimates for these regions reflect the regional boundary definitions as noted in 2019-20.

Some regional boundaries have subsequently changed in 2021 which will be reflected in the 2020-21 estimates to be released in 2022 (date TBC). i.e. High Country and Yarra Valley and Dandenong Ranges.

Appendix B – Notes

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.

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 includes the following:
- Changes to ABS National Accounts data.
- Changes to regional expenditure data (REX) by TRA.
- More information can be found on the TRA website:

https://www.tra.gov.au/Research/Economics-and-the-tourism-industry/economic-reports

- All results in this model have been calibrated back against the 2019-20 state TSA data for Victoria to ensure consistency, as for other jurisdictions. Historical data has been generated back to 2009-10 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.

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The approach to data smoothing of estimates for smaller regions has changed

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 employment 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 coronavirus (COVID-19) on the tourism industry in 2020, **estimates from 2019-20 have not been smoothed** as it may obscure the significant falls in activity that occurred for most regions and present an unrealistic, more optimistic assessment.

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, Upper Yarra 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 the TRA website:
https://www.tra.gov.au/Research/Economics-and-the-tourism-industry/economic-reports

More Information

For more detail on the Regional Tourism Satellite Accounts 2019-20, published by Tourism Research Australia, refer to reports and excel data files at this link:
https://www.tra.gov.au/Economic-analysis/Economic-Value/Regional-Tourism-Satellite-Account/regional-tourism-satellite-account

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

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.

Tourism employment: Refers to the persons employed in tourism-related industries. Those are industries that would either cease to exist in their present form, or would be significantly affected if tourism were to cease.

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 per cent 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	
Other tourism industries		
	Travel agency and tour operator services	
All other industries		

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2019-20 Regional Tourism Satellite Accounts

Appendix C – Detailed RTSA estimates

Key Indicators Of Tourism's Total Contribution To Victoria's Tourism Regions 2019-20

	GRP			GVA			Employment	
Tourism Region	($M)		Share of economy (%)	($M)		Share of economy (%)	('000)	Share of economy (%)
Direct tourism contribution								
Melbourne	$	8,067	2.2%	$	7,502	2.2%	88.6	3.6%
Daylesford and the Macedon Ranges	$	142	4.6%	$	131	4.6%	3.9	12.2%
Geelong and the Bellarine	$	415	2.9%	$	383	2.8%	7.0	5.5%
Gippsland	$	440	3.2%	$	402	3.1%	8.9	7.8%
Goldfields	$	394	2.5%	$	364	2.5%	7.3	5.3%
Grampians	$	148	3.2%	$	134	3.2%	3.8	8.7%
Great Ocean Road	$	507	6.8%	$	459	6.6%	9.8	14.1%
Mornington Peninsula	$	475	3.8%	$	435	3.8%	8.4	7.1%
Murray	$	519	3.1%	$	473	3.1%	10.8	7.0%
Phillip Island	$	206	16.6%	$	188	16.3%	3.8	29.9%
Victoria's High Country	$	401	9.1%	$	362	8.8%	8.1	18.6%
Yarra Valley and Dandenong Ranges	$	317	3.1%	$	294	3.1%	6.2	6.0%
Regional Victoria	**$**	**3,963**	**3.8%**	**$**	**3,625**	**3.8%**	**77.9**	**8.2%**
Victoria	**$**	**12,030**	**2.6%**	**$**	**11,127**	**2.6%**	**166.5**	**4.9%**
Indirect tourism contribution								
Melbourne	$	6,477	1.8%	$	5,756	1.7%	36.7	1.5%
Daylesford and the Macedon Ranges	$	116	3.8%	$	103	3.6%	0.7	2.1%
Geelong and the Bellarine	$	350	2.4%	$	311	2.3%	2.1	1.7%
Gippsland	$	396	2.9%	$	352	2.7%	2.3	2.0%
Goldfields	$	362	2.3%	$	322	2.2%	2.1	1.6%
Grampians	$	131	2.9%	$	117	2.7%	0.8	1.8%
Great Ocean Road	$	464	6.2%	$	412	5.9%	2.8	4.0%
Mornington Peninsula	$	413	3.3%	$	366	3.2%	2.5	2.1%
Murray	$	461	2.8%	$	409	2.7%	2.7	1.8%
Phillip Island	$	173	13.9%	$	154	13.3%	1.0	7.9%
Victoria's High Country	$	354	8.0%	$	314	7.7%	2.1	4.8%
Yarra Valley and Dandenong Ranges	$	233	2.3%	$	207	2.2%	1.4	1.3%
Regional Victoria	**$**	**3,456**	**3.3%**	**$**	**3,067**	**3.2%**	**20.5**	**2.1%**
Victoria (internal contribution only)[1]	**$**	**9,933**	**2.1%**	**$**	**8,823**	**2.0%**	**57.2**	**1.7%**
Rest of Australia	*$*	*1,439*	*NA*	*$*	*1,276*	*NA*	*8.3*	*NA*
Victoria (reported STSA estimates)[2]	**$**	**11,372**	**2.4%**	**$**	**10,099**	**2.3%**	**65.5**	**1.9%**
Total tourism contribution								
Melbourne	$	14,545	4.0%	$	13,258	3.9%	125.3	5.1%
Daylesford and the Macedon Ranges	$	258	8.4%	$	235	8.2%	4.5	14.3%
Geelong and the Bellarine	$	765	5.3%	$	693	5.1%	9.1	7.2%
Gippsland	$	836	6.0%	$	754	5.9%	11.2	9.8%
Goldfields	$	756	4.9%	$	685	4.8%	9.4	6.9%
Grampians	$	279	6.1%	$	251	5.9%	4.6	10.5%
Great Ocean Road	$	971	13.0%	$	871	12.6%	12.6	18.1%
Mornington Peninsula	$	888	7.1%	$	801	6.9%	10.9	9.2%
Murray	$	980	5.9%	$	883	5.8%	13.6	8.8%
Phillip Island	$	379	30.5%	$	341	29.6%	4.8	37.8%
Victoria's High Country	$	755	17.1%	$	676	16.5%	10.2	23.4%
Yarra Valley and Dandenong Ranges	$	550	5.4%	$	501	5.3%	7.5	7.3%
Regional Victoria	**$**	**7,419**	**7.1%**	**$**	**6,692**	**6.9%**	**98.4**	**10.3%**
Victoria (internal contribution only)[1]	**$**	**21,963**	**4.7%**	**$**	**19,950**	**4.6%**	**223.7**	**6.6%**
Rest of Australia	*$*	*1,439*	*NA*	*$*	*1,276*	*NA*	*8.3*	*NA*
Victoria (reported STSA estimates)[2]	**$**	**23,402**	**5.0%**	**$**	**21,225**	**4.9%**	**232.0**	**6.8%**

Notes on the data

[1] 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 (eg. 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.

[2] These estimates may differ from the previously published data in the 2019-20 State Tourism Satellite Accounts and 2018-19 Regional Tourism Satellite Accounts, by Tourism Research Australia.

These estimates reflect the regional boundary definitions as noted in 2019-20. Some regional boundaries have subsequently changed in 2021 i.e. High Country and Yarra Valley and Dandenong Ranges.

- Back cast estimates from 2009-10 to 2019-20 in the table above are based on the same methodology and are comparable.

*AAG – Average Annual Growth

Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

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2019-20 Regional Tourism Satellite Accounts

Victoria's tourism regions 2009-10 to 2019-20 - GRP ($millions)

	Tourism Gross Regional Product												
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	AAG* 2014-15 to 2019-20	% Change 2018-19 vs 2019-20
Tourism Region	$ millions - basic prices											% p.a.	%
Direct tourism contribution													
Melbourne	5,119	5,535	5,824	6,247	6,503	6,994	7,713	8,347	8,916	9,811	8,067	2.9%	-17.8%
Daylesford and the Macedon Ranges	100	102	104	106	111	118	129	140	154	169	142	3.8%	-16.1%
Geelong and the Bellarine	297	276	304	308	323	359	390	425	444	493	415	2.9%	-15.7%
Gippsland	310	340	338	385	390	383	384	420	430	487	440	2.8%	-9.6%
Goldfields	278	317	354	358	377	392	383	455	457	523	394	0.1%	-24.7%
Grampians	86	95	97	105	108	117	117	130	141	158	148	4.9%	-6.8%
Great Ocean Road	358	368	416	377	433	443	453	528	553	588	507	2.7%	-13.9%
Mornington Peninsula	298	321	326	347	341	392	430	467	537	592	475	3.9%	-19.8%
Murray	390	392	409	461	465	489	484	540	568	613	519	1.2%	-15.3%
Phillip Island	164	155	190	213	193	173	207	223	215	283	206	3.5%	-27.3%
Victoria's High Country	282	311	329	315	290	372	369	388	477	592	401	1.5%	-32.2%
Yarra Valley and Dandenong Ranges	223	254	242	256	296	270	312	329	351	431	317	3.3%	-26.5%
Regional Victoria	**2,787**	**2,933**	**3,110**	**3,231**	**3,329**	**3,508**	**3,657**	**4,047**	**4,328**	**4,929**	**3,963**	**2.5%**	**-19.6%**
Victoria	**7,906**	**8,468**	**8,934**	**9,477**	**9,832**	**10,502**	**11,370**	**12,394**	**13,244**	**14,740**	**12,030**	**2.8%**	**-18.4%**
Indirect tourism contribution													
Melbourne	4,857	5,141	5,345	5,663	5,865	6,184	6,760	7,345	7,829	8,331	6,477	0.9%	-22.3%
Daylesford and the Macedon Ranges	94	95	95	95	99	103	113	122	135	146	116	2.5%	-20.5%
Geelong and the Bellarine	306	272	296	288	303	331	356	393	404	437	350	1.1%	-19.9%
Gippsland	324	352	339	382	388	369	363	401	408	453	396	1.5%	-12.5%
Goldfields	301	336	372	368	378	394	377	455	455	511	362	-1.7%	-29.1%
Grampians	86	93	95	100	102	110	112	123	134	149	131	3.5%	-11.8%
Great Ocean Road	382	389	427	377	439	433	445	517	548	559	464	1.4%	-16.9%
Mornington Peninsula	301	316	314	330	326	365	402	434	512	540	413	2.5%	-23.6%
Murray	410	405	409	459	463	476	462	520	553	572	461	-0.6%	-19.4%
Phillip Island	167	151	185	209	184	155	189	204	195	247	173	2.3%	-29.9%
Victoria's High Country	287	311	320	297	269	347	340	357	457	546	354	0.4%	-35.1%
Yarra Valley and Dandenong Ranges	194	223	206	209	253	214	258	263	278	341	233	1.8%	-31.5%
Regional Victoria	**2,853**	**2,942**	**3,059**	**3,113**	**3,203**	**3,296**	**3,417**	**3,791**	**4,079**	**4,502**	**3,456**	**0.9%**	**-23.2%**
Victoria (internal contribution only)[1]	**7,710**	**8,083**	**8,403**	**8,776**	**9,068**	**9,481**	**10,177**	**11,135**	**11,907**	**12,833**	**9,933**	**0.9%**	**-22.6%**
Rest of Australia	*1,130*	*1,174*	*1,226*	*1,287*	*1,329*	*1,391*	*1,485*	*1,633*	*1,746*	*1,863*	*1,439*	*0.7%*	*-22.8%*
Victoria (reported STSA estimates)[2]	**8,840**	**9,257**	**9,629**	**10,063**	**10,398**	**10,871**	**11,662**	**12,768**	**13,654**	**14,696**	**11,372**	**0.9%**	**-22.6%**
Total tourism contribution													
Melbourne	9,976	10,676	11,169	11,909	12,368	13,178	14,473	15,692	16,745	18,142	14,545	2.0%	-19.8%
Daylesford and the Macedon Ranges	194	197	199	200	210	220	242	263	289	316	258	3.2%	-18.2%
Geelong and the Bellarine	603	548	601	596	625	690	745	819	848	930	765	2.1%	-17.7%
Gippsland	634	692	677	767	778	752	747	821	838	940	836	2.2%	-11.0%
Goldfields	580	653	727	726	755	786	760	911	912	1,034	756	-0.8%	-26.9%
Grampians	172	188	193	205	211	227	229	253	274	307	279	4.2%	-9.2%
Great Ocean Road	740	757	843	754	872	876	898	1,046	1,101	1,147	971	2.1%	-15.4%
Mornington Peninsula	600	637	640	676	667	758	831	901	1,049	1,132	888	3.2%	-21.6%
Murray	800	797	818	921	927	965	946	1,060	1,121	1,185	980	0.3%	-17.3%
Phillip Island	331	307	374	422	377	328	396	427	411	530	379	2.9%	-28.5%
Victoria's High Country	570	622	649	612	560	719	709	745	935	1,138	755	1.0%	-33.6%
Yarra Valley and Dandenong Ranges	416	477	448	466	549	483	570	592	629	772	550	2.6%	-28.7%
Regional Victoria	**5,640**	**5,875**	**6,169**	**6,344**	**6,532**	**6,805**	**7,074**	**7,838**	**8,407**	**9,431**	**7,419**	**1.7%**	**-21.3%**
Victoria (internal contribution only)[1]	**15,616**	**16,551**	**17,338**	**18,254**	**18,900**	**19,983**	**21,547**	**23,529**	**25,152**	**27,573**	**21,963**	**1.9%**	**-20.3%**
Rest of Australia	*1,130*	*1,174*	*1,226*	*1,287*	*1,329*	*1,391*	*1,485*	*1,633*	*1,746*	*1,863*	*1,439*	*0.7%*	*-22.8%*
Victoria (reported STSA estimates)[2]	**16,770**	**17,725**	**18,563**	**19,541**	**20,229**	**21,373**	**23,032**	**25,162**	**26,898**	**29,436**	**23,402**	**1.8%**	**-20.5%**

Notes on the data

[1] 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 (eg. 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.

[2] These estimates may differ from the previously published data in the 2019-20 State Tourism Satellite Accounts and 2018-19

These estimates reflect the regional boundary definitions as noted in 2019-20. Some regional boundaries have subsequently changed in 2021 i.e. High Country and Yarra Valley and Dandenong Ranges.

Regional Tourism Satellite Accounts, by Tourism Research Australia.

- Back cast estimates from 2009-10 to 2019-20 in the table above are based on the same methodology and are comparable.

*AAG – Average Annual Growth

Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

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2019-20 Regional Tourism Satellite Accounts

Victoria’s tourism regions 2009-10 to 2019-20 - GRP Share of Economy (%)

	Tourism Gross Regional Product												
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	% Change 2014-15 to 2019-20	% Change 2018-19 vs 2019-20
Tourism Region	% Share of Economy											% pts	
Direct tourism contribution													
Melbourne	2.2%	2.2%	2.2%	2.3%	2.3%	2.4%	2.6%	2.6%	2.6%	2.8%	2.2%	-0.2%	-0.6%
Daylesford and the Macedon Ranges	5.0%	4.7%	4.6%	4.5%	4.7%	4.7%	5.1%	5.2%	5.4%	5.6%	4.6%	-0.1%	-1.0%
Geelong and the Bellarine	3.1%	2.8%	2.9%	2.9%	2.9%	3.1%	3.2%	3.4%	3.3%	3.5%	2.9%	-0.2%	-0.6%
Gippsland	3.4%	3.4%	3.3%	3.6%	3.7%	3.4%	3.4%	3.5%	3.3%	3.7%	3.2%	-0.3%	-0.5%
Goldfields	2.8%	2.9%	3.2%	3.2%	3.2%	3.2%	3.0%	3.4%	3.2%	3.5%	2.5%	-0.7%	-1.0%
Grampians	2.8%	2.8%	2.8%	2.9%	3.0%	3.0%	3.1%	3.2%	3.3%	3.6%	3.2%	0.2%	-0.3%
Great Ocean Road	7.1%	6.7%	7.4%	6.5%	7.4%	7.1%	7.3%	7.9%	8.0%	8.0%	6.8%	-0.3%	-1.3%
Mornington Peninsula	3.7%	3.7%	3.7%	3.8%	3.6%	3.9%	4.2%	4.3%	4.7%	4.9%	3.8%	-0.1%	-1.1%
Murray	3.5%	3.3%	3.3%	3.6%	3.6%	3.6%	3.5%	3.7%	3.7%	3.8%	3.1%	-0.5%	-0.7%
Phillip Island	20.3%	17.9%	21.1%	22.8%	20.2%	17.2%	20.1%	20.3%	18.7%	23.4%	16.6%	-0.6%	-6.9%
Victoria's High Country	9.6%	9.8%	10.0%	9.2%	8.4%	10.2%	10.1%	10.0%	11.7%	13.7%	9.1%	-1.2%	-4.6%
Yarra Valley and Dandenong Ranges	3.4%	3.6%	3.3%	3.4%	3.8%	3.3%	3.7%	3.7%	3.8%	4.3%	3.1%	-0.2%	-1.2%
Regional Victoria	**4.1%**	**4.0%**	**4.1%**	**4.1%**	**4.2%**	**4.2%**	**4.3%**	**4.4%**	**4.5%**	**4.9%**	**3.8%**	**-0.4%**	**-1.1%**
Victoria	**2.6%**	**2.6%**	**2.7%**	**2.7%**	**2.8%**	**2.8%**	**2.9%**	**3.0%**	**3.1%**	**3.2%**	**2.6%**	**-0.2%**	**-0.7%**
Indirect tourism contribution													
Melbourne	2.1%	2.1%	2.1%	2.1%	2.1%	2.1%	2.2%	2.3%	2.3%	2.4%	1.8%	-0.4%	-0.6%
Daylesford and the Macedon Ranges	4.6%	4.3%	4.2%	4.1%	4.2%	4.1%	4.4%	4.5%	4.8%	4.9%	3.8%	-0.3%	-1.1%
Geelong and the Bellarine	3.2%	2.7%	2.8%	2.7%	2.7%	2.8%	3.0%	3.1%	3.0%	3.1%	2.4%	-0.4%	-0.7%
Gippsland	3.5%	3.5%	3.4%	3.6%	3.7%	3.3%	3.2%	3.3%	3.1%	3.4%	2.9%	-0.4%	-0.6%
Goldfields	3.0%	3.1%	3.3%	3.2%	3.2%	3.2%	3.0%	3.4%	3.2%	3.4%	2.3%	-0.9%	-1.1%
Grampians	2.8%	2.7%	2.7%	2.7%	2.8%	2.9%	3.0%	3.0%	3.1%	3.3%	2.9%	0.0%	-0.5%
Great Ocean Road	7.6%	7.1%	7.6%	6.5%	7.5%	7.0%	7.2%	7.8%	7.9%	7.6%	6.2%	-0.8%	-1.4%
Mornington Peninsula	3.7%	3.7%	3.5%	3.6%	3.4%	3.7%	3.9%	4.0%	4.5%	4.4%	3.3%	-0.4%	-1.1%
Murray	3.7%	3.4%	3.3%	3.6%	3.6%	3.5%	3.4%	3.6%	3.6%	3.5%	2.8%	-0.7%	-0.8%
Phillip Island	20.7%	17.4%	20.5%	22.3%	19.2%	15.3%	18.3%	18.5%	17.0%	20.5%	13.9%	-1.4%	-6.5%
Victoria's High Country	9.7%	9.7%	9.7%	8.7%	7.8%	9.5%	9.3%	9.2%	11.2%	12.6%	8.0%	-1.5%	-4.6%
Yarra Valley and Dandenong Ranges	2.9%	3.1%	2.8%	2.7%	3.2%	2.6%	3.1%	2.9%	3.0%	3.4%	2.3%	-0.3%	-1.1%
Regional Victoria	**4.2%**	**4.0%**	**4.0%**	**4.0%**	**4.0%**	**3.9%**	**4.0%**	**4.2%**	**4.3%**	**4.5%**	**3.3%**	**-0.6%**	**-1.1%**
Victoria (internal contribution only)[1]	**2.6%**	**2.5%**	**2.5%**	**2.5%**	**2.5%**	**2.5%**	**2.6%**	**2.7%**	**2.8%**	**2.8%**	**2.1%**	**-0.4%**	**-0.7%**
Rest of Australia	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*0.0%*	*0.0%*
Victoria (reported STSA estimates)[2]	**2.9%**	**2.9%**	**2.9%**	**2.9%**	**2.9%**	**2.9%**	**3.0%**	**3.1%**	**3.2%**	**3.2%**	**2.4%**	**-0.5%**	**-0.8%**
Total tourism contribution													
Melbourne	4.3%	4.3%	4.3%	4.5%	4.5%	4.6%	4.8%	4.9%	5.0%	5.1%	4.0%	-0.6%	-1.1%
Daylesford and the Macedon Ranges	9.6%	9.0%	8.8%	8.6%	8.8%	8.8%	9.5%	9.7%	10.2%	10.5%	8.4%	-0.4%	-2.2%
Geelong and the Bellarine	6.4%	5.5%	5.7%	5.5%	5.6%	5.9%	6.2%	6.5%	6.3%	6.5%	5.3%	-0.7%	-1.3%
Gippsland	6.9%	6.9%	6.7%	7.3%	7.3%	6.7%	6.6%	6.8%	6.5%	7.1%	6.0%	-0.7%	-1.1%
Goldfields	5.8%	6.0%	6.5%	6.4%	6.5%	6.4%	6.0%	6.8%	6.4%	7.0%	4.9%	-1.5%	-2.1%
Grampians	5.6%	5.5%	5.5%	5.6%	5.8%	5.9%	6.1%	6.2%	6.4%	6.9%	6.1%	0.2%	-0.8%
Great Ocean Road	14.7%	13.9%	15.0%	12.9%	14.8%	14.1%	14.5%	15.7%	15.9%	15.7%	13.0%	-1.1%	-2.7%
Mornington Peninsula	7.4%	7.4%	7.2%	7.3%	7.0%	7.6%	8.1%	8.3%	9.1%	9.3%	7.1%	-0.5%	-2.2%
Murray	7.2%	6.7%	6.6%	7.2%	7.2%	7.1%	6.9%	7.3%	7.3%	7.3%	5.9%	-1.2%	-1.4%
Phillip Island	40.9%	35.3%	41.5%	45.0%	39.3%	32.5%	38.5%	38.8%	35.7%	43.9%	30.5%	-2.0%	-13.4%
Victoria's High Country	19.3%	19.5%	19.7%	17.9%	16.2%	19.8%	19.3%	19.1%	22.9%	26.3%	17.1%	-2.7%	-9.3%
Yarra Valley and Dandenong Ranges	6.3%	6.7%	6.0%	6.1%	7.0%	5.9%	6.8%	6.6%	6.7%	7.7%	5.4%	-0.5%	-2.4%
Regional Victoria	**8.3%**	**8.0%**	**8.1%**	**8.1%**	**8.2%**	**8.1%**	**8.2%**	**8.6%**	**8.8%**	**9.3%**	**7.1%**	**-1.0%**	**-2.2%**
Victoria (internal contribution only)[1]	**5.2%**	**5.1%**	**5.2%**	**5.3%**	**5.3%**	**5.4%**	**5.6%**	**5.7%**	**5.8%**	**6.1%**	**4.7%**	**-0.7%**	**-1.4%**
Rest of Australia	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*0.0%*	*0.0%*
Victoria (reported STSA estimates)[2]	**5.5%**	**5.5%**	**5.5%**	**5.7%**	**5.7%**	**5.7%**	**6.0%**	**6.1%**	**6.2%**	**6.5%**	**5.0%**	**-0.7%**	**-1.5%**

Notes on the data

[1] 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 (eg. 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.

[2] These estimates may differ from the previously published data in the 2019-20 State Tourism Satellite Accounts and 2018-19

These estimates reflect the regional boundary definitions as noted in 2019-20. Some regional boundaries have subsequently changed in 2021 i.e. High Country and Yarra Valley and Dandenong Ranges.

Regional Tourism Satellite Accounts, by Tourism Research Australia.

- Back cast estimates from 2009-10 to 2019-20 in the table above are based on the same methodology and are comparable.

*AAG – Average Annual Growth

Victoria State Government Jobs, Precincts and Regions

Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

2019-20 Regional Tourism Satellite Accounts

Victoria's tourism regions 2009-10 to 2019-20 – GVA ($millions)

	Tourism Gross Value Added												
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	AAG* 2014-15 to 2019-20	% Change 2018-19 vs 2019-20
Tourism Region	$ millions - basic prices											% p.a.	%
Direct tourism contribution													
Melbourne	4,681	5,102	5,358	5,778	6,032	6,482	7,178	7,742	8,254	9,090	7,502	3.0%	-17.5%
Daylesford and the Macedon Ranges	93	95	96	98	103	108	117	127	140	154	131	4.0%	-14.9%
Geelong and the Bellarine	275	253	281	285	296	328	353	388	409	454	383	3.1%	-15.7%
Gippsland	283	308	309	349	353	346	345	378	389	443	402	3.0%	-9.2%
Goldfields	260	293	329	334	348	359	349	417	421	482	364	0.3%	-24.6%
Grampians	79	86	89	95	98	106	106	117	127	143	134	5.0%	-6.0%
Great Ocean Road	325	331	378	341	390	396	404	472	499	532	459	3.0%	-13.8%
Mornington Peninsula	275	292	299	318	311	357	388	425	492	542	435	4.0%	-19.7%
Murray	356	355	374	419	423	442	436	488	514	559	473	1.4%	-15.3%
Phillip Island	150	140	172	194	173	155	184	198	193	257	188	3.9%	-27.0%
Victoria's High Country	257	278	298	283	261	331	326	346	427	531	362	1.8%	-31.8%
Yarra Valley and Dandenong Ranges	207	235	225	239	274	249	287	302	324	399	294	3.4%	-26.3%
Regional Victoria	**2,559**	**2,665**	**2,849**	**2,954**	**3,031**	**3,178**	**3,296**	**3,658**	**3,935**	**4,496**	**3,625**	**2.7%**	**-19.4%**
Victoria	**7,240**	**7,767**	**8,207**	**8,732**	**9,063**	**9,660**	**10,475**	**11,400**	**12,189**	**13,586**	**11,127**	**2.9%**	**-18.1%**
Indirect tourism contribution													
Melbourne	4,209	4,489	4,684	5,001	5,168	5,476	5,998	6,531	6,909	7,416	5,756	1.0%	-22.4%
Daylesford and the Macedon Ranges	81	82	83	83	87	91	100	108	120	130	103	2.7%	-20.4%
Geelong and the Bellarine	265	237	259	254	267	293	316	350	356	389	311	1.2%	-20.1%
Gippsland	280	307	297	337	342	326	322	356	360	403	352	1.5%	-12.7%
Goldfields	261	293	326	325	333	349	335	405	401	455	322	-1.6%	-29.3%
Grampians	74	81	83	87	90	97	99	109	118	132	117	3.6%	-11.7%
Great Ocean Road	331	339	374	333	386	383	394	459	483	497	412	1.4%	-17.1%
Mornington Peninsula	261	276	275	291	287	323	356	386	451	481	366	2.5%	-23.7%
Murray	355	353	358	405	407	421	409	462	487	509	409	-0.6%	-19.5%
Phillip Island	145	132	162	184	162	137	167	181	172	220	154	2.4%	-30.1%
Victoria's High Country	249	271	280	262	237	307	301	317	403	485	314	0.5%	-35.2%
Yarra Valley and Dandenong Ranges	168	194	180	185	223	189	229	234	246	303	207	1.8%	-31.6%
Regional Victoria	**2,470**	**2,566**	**2,678**	**2,747**	**2,821**	**2,916**	**3,028**	**3,367**	**3,598**	**4,003**	**3,067**	**1.0%**	**-23.4%**
Victoria (internal contribution only)[1]	**6,679**	**7,054**	**7,362**	**7,748**	**7,989**	**8,392**	**9,026**	**9,898**	**10,507**	**11,419**	**8,823**	**1.0%**	**-22.7%**
Rest of Australia	*978*	*1,023*	*1,072*	*1,135*	*1,169*	*1,229*	*1,315*	*1,449*	*1,538*	*1,655*	*1,276*	*0.7%*	*-22.9%*
Victoria (reported STSA estimates)[2]	**7,657**	**8,077**	**8,435**	**8,882**	**9,158**	**9,621**	**10,341**	**11,347**	**12,044**	**13,073**	**10,099**	**1.0%**	**-22.8%**
Total tourism contribution													
Melbourne	8,891	9,591	10,043	10,780	11,200	11,958	13,176	14,273	15,163	16,506	13,258	2.1%	-19.7%
Daylesford and the Macedon Ranges	174	177	179	181	190	199	217	236	259	284	235	3.4%	-17.4%
Geelong and the Bellarine	540	490	541	540	562	621	669	738	765	843	693	2.2%	-17.7%
Gippsland	564	614	606	686	695	672	667	734	749	846	754	2.3%	-10.9%
Goldfields	521	586	655	659	681	708	683	821	822	937	685	-0.7%	-26.9%
Grampians	153	167	172	182	188	203	205	227	245	275	251	4.3%	-8.7%
Great Ocean Road	656	670	752	673	776	780	799	932	982	1,029	871	2.2%	-15.4%
Mornington Peninsula	537	569	574	610	598	681	744	810	944	1,022	801	3.3%	-21.6%
Murray	711	709	732	824	831	863	845	950	1,002	1,067	883	0.4%	-17.3%
Phillip Island	294	271	334	378	335	292	351	379	365	477	341	3.2%	-28.4%
Victoria's High Country	505	549	578	545	498	638	627	663	830	1,016	676	1.2%	-33.4%
Yarra Valley and Dandenong Ranges	374	429	405	423	496	439	516	536	570	702	501	2.7%	-28.6%
Regional Victoria	**5,029**	**5,231**	**5,527**	**5,701**	**5,852**	**6,094**	**6,324**	**7,025**	**7,532**	**8,499**	**6,692**	**1.9%**	**-21.3%**
Victoria (internal contribution only)[1]	**13,920**	**14,822**	**15,570**	**16,480**	**17,052**	**18,051**	**19,500**	**21,299**	**22,695**	**25,005**	**19,950**	**2.0%**	**-20.2%**
Rest of Australia	*978*	*1,023*	*1,072*	*1,135*	*1,169*	*1,229*	*1,315*	*1,449*	*1,538*	*1,655*	*1,276*	*0.7%*	*-22.9%*
Victoria (reported STSA estimates)[2]	**14,920**	**15,845**	**16,642**	**17,615**	**18,221**	**19,281**	**20,816**	**22,748**	**24,233**	**26,659**	**21,225**	**1.9%**	**-20.4%**

Notes on the data

[1] 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 (eg. 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.

[2] These estimates may differ from the previously published data in the 2019-20 State Tourism Satellite Accounts and 2018-19

These estimates reflect the regional boundary definitions as noted in 2019-20. Some regional boundaries have subsequently changed in 2021 i.e. High Country and Yarra Valley and Dandenong Ranges.

Regional Tourism Satellite Accounts, by Tourism Research Australia.

- Back cast estimates from 2009-10 to 2019-20 in the table above are based on the same methodology and are comparable.

*AAG – Average Annual Growth

Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

VICTORIA State Government | Jobs, Precincts and Regions

2019-20 Regional Tourism Satellite Accounts

Victoria’s tourism regions 2009-10 to 2019-20 - GVA Share of Economy (%)

	Tourism Gross Value Added												
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	% Change 2014-15 to 2019-20	% Change 2018-19 vs 2019-20
Tourism Region	% Share of Economy											% pts	
Direct tourism contribution													
Melbourne	2.1%	2.2%	2.2%	2.3%	2.3%	2.4%	2.6%	2.6%	2.6%	2.7%	2.2%	-0.2%	-0.5%
Daylesford and the Macedon Ranges	4.9%	4.6%	4.5%	4.4%	4.6%	4.6%	4.9%	5.0%	5.3%	5.5%	4.6%	0.0%	-0.9%
Geelong and the Bellarine	3.1%	2.7%	2.8%	2.8%	2.8%	3.0%	3.1%	3.3%	3.3%	3.4%	2.8%	-0.2%	-0.6%
Gippsland	3.3%	3.3%	3.2%	3.5%	3.5%	3.3%	3.3%	3.3%	3.2%	3.6%	3.1%	-0.2%	-0.4%
Goldfields	2.8%	2.9%	3.1%	3.1%	3.2%	3.1%	2.9%	3.3%	3.2%	3.5%	2.5%	-0.6%	-0.9%
Grampians	2.7%	2.7%	2.7%	2.8%	2.9%	2.9%	3.0%	3.1%	3.2%	3.4%	3.2%	0.2%	-0.3%
Great Ocean Road	6.9%	6.4%	7.1%	6.2%	7.1%	6.8%	7.0%	7.6%	7.7%	7.8%	6.6%	-0.2%	-1.1%
Mornington Peninsula	3.6%	3.6%	3.5%	3.7%	3.5%	3.8%	4.0%	4.2%	4.6%	4.7%	3.8%	-0.1%	-1.0%
Murray	3.4%	3.2%	3.2%	3.5%	3.5%	3.5%	3.4%	3.6%	3.6%	3.7%	3.1%	-0.4%	-0.6%
Phillip Island	19.7%	17.1%	20.2%	21.9%	19.2%	16.4%	19.1%	19.2%	18.0%	22.7%	16.3%	-0.1%	-6.4%
Victoria's High Country	9.3%	9.3%	9.5%	8.8%	8.0%	9.7%	9.5%	9.5%	11.2%	13.1%	8.8%	-0.9%	-4.3%
Yarra Valley and Dandenong Ranges	3.3%	3.5%	3.2%	3.3%	3.7%	3.2%	3.6%	3.6%	3.7%	4.3%	3.1%	-0.1%	-1.2%
Regional Victoria	**4.0%**	**3.8%**	**4.0%**	**4.0%**	**4.0%**	**4.0%**	**4.1%**	**4.3%**	**4.4%**	**4.8%**	**3.8%**	**-0.3%**	**-1.0%**
Victoria	**2.5%**	**2.5%**	**2.6%**	**2.7%**	**2.7%**	**2.8%**	**2.9%**	**3.0%**	**3.0%**	**3.2%**	**2.6%**	**-0.2%**	**-0.6%**
Indirect tourism contribution													
Melbourne	1.9%	1.9%	1.9%	2.0%	2.0%	2.0%	2.1%	2.2%	2.2%	2.2%	1.7%	-0.3%	-0.5%
Daylesford and the Macedon Ranges	4.3%	4.0%	3.9%	3.8%	3.9%	3.9%	4.2%	4.3%	4.5%	4.6%	3.6%	-0.2%	-1.0%
Geelong and the Bellarine	3.0%	2.5%	2.6%	2.5%	2.6%	2.7%	2.8%	2.9%	2.8%	2.9%	2.3%	-0.4%	-0.6%
Gippsland	3.3%	3.3%	3.1%	3.4%	3.4%	3.1%	3.0%	3.1%	3.0%	3.2%	2.7%	-0.4%	-0.5%
Goldfields	2.8%	2.9%	3.1%	3.0%	3.0%	3.0%	2.8%	3.2%	3.0%	3.3%	2.2%	-0.8%	-1.0%
Grampians	2.5%	2.5%	2.5%	2.5%	2.6%	2.7%	2.8%	2.8%	3.0%	3.2%	2.7%	0.0%	-0.4%
Great Ocean Road	7.0%	6.6%	7.0%	6.0%	7.0%	6.6%	6.8%	7.4%	7.5%	7.3%	5.9%	-0.6%	-1.3%
Mornington Peninsula	3.4%	3.4%	3.3%	3.3%	3.2%	3.4%	3.7%	3.8%	4.2%	4.2%	3.2%	-0.3%	-1.0%
Murray	3.4%	3.2%	3.1%	3.4%	3.3%	3.3%	3.2%	3.4%	3.4%	3.4%	2.7%	-0.6%	-0.7%
Phillip Island	19.0%	16.1%	19.0%	20.8%	17.9%	14.4%	17.4%	17.5%	16.0%	19.4%	13.3%	-1.1%	-6.1%
Victoria's High Country	9.0%	9.0%	9.0%	8.1%	7.3%	9.0%	8.8%	8.7%	10.6%	12.0%	7.7%	-1.3%	-4.3%
Yarra Valley and Dandenong Ranges	2.7%	2.9%	2.6%	2.6%	3.0%	2.4%	2.9%	2.8%	2.8%	3.2%	2.2%	-0.3%	-1.1%
Regional Victoria	**3.8%**	**3.7%**	**3.7%**	**3.7%**	**3.7%**	**3.7%**	**3.8%**	**3.9%**	**4.0%**	**4.2%**	**3.2%**	**-0.5%**	**-1.1%**
Victoria (internal contribution only)[1]	**2.4%**	**2.3%**	**2.3%**	**2.4%**	**2.4%**	**2.4%**	**2.5%**	**2.6%**	**2.6%**	**2.7%**	**2.0%**	**-0.4%**	**-0.6%**
Rest of Australia	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*0.0%*	*0.0%*
Victoria (reported STSA estimates)[2]	**2.7%**	**2.6%**	**2.6%**	**2.7%**	**2.7%**	**2.8%**	**2.9%**	**3.0%**	**3.0%**	**3.1%**	**2.3%**	**-0.4%**	**-0.7%**
Total tourism contribution													
Melbourne	4.0%	4.1%	4.1%	4.3%	4.3%	4.4%	4.7%	4.8%	4.8%	5.0%	3.9%	-0.5%	-1.0%
Daylesford and the Macedon Ranges	9.1%	8.6%	8.4%	8.2%	8.5%	8.4%	9.1%	9.3%	9.8%	10.1%	8.2%	-0.2%	-1.9%
Geelong and the Bellarine	6.1%	5.2%	5.5%	5.3%	5.4%	5.7%	5.9%	6.2%	6.1%	6.3%	5.1%	-0.5%	-1.2%
Gippsland	6.5%	6.5%	6.3%	6.9%	7.0%	6.4%	6.3%	6.5%	6.2%	6.8%	5.9%	-0.6%	-0.9%
Goldfields	5.5%	5.7%	6.2%	6.1%	6.2%	6.2%	5.8%	6.6%	6.2%	6.7%	4.8%	-1.4%	-2.0%
Grampians	5.2%	5.2%	5.2%	5.3%	5.5%	5.6%	5.8%	5.9%	6.1%	6.6%	5.9%	0.3%	-0.7%
Great Ocean Road	13.9%	13.0%	14.1%	12.2%	14.0%	13.4%	13.8%	14.9%	15.2%	15.0%	12.6%	-0.8%	-2.5%
Mornington Peninsula	7.1%	7.0%	6.8%	7.0%	6.7%	7.2%	7.7%	7.9%	8.8%	9.0%	6.9%	-0.3%	-2.0%
Murray	6.9%	6.3%	6.3%	6.8%	6.8%	6.8%	6.6%	6.9%	7.0%	7.0%	5.8%	-1.0%	-1.3%
Phillip Island	38.7%	33.2%	39.1%	42.6%	37.2%	30.8%	36.5%	36.8%	34.0%	42.1%	29.6%	-1.2%	-12.5%
Victoria's High Country	18.2%	18.3%	18.5%	16.9%	15.3%	18.7%	18.3%	18.2%	21.8%	25.1%	16.5%	-2.2%	-8.6%
Yarra Valley and Dandenong Ranges	6.0%	6.4%	5.8%	5.9%	6.7%	5.7%	6.6%	6.4%	6.5%	7.5%	5.3%	-0.4%	-2.2%
Regional Victoria	**7.8%**	**7.6%**	**7.7%**	**7.7%**	**7.8%**	**7.7%**	**7.9%**	**8.2%**	**8.4%**	**9.0%**	**6.9%**	**-0.8%**	**-2.0%**
Victoria (internal contribution only)[1]	**4.9%**	**4.9%**	**4.9%**	**5.1%**	**5.1%**	**5.2%**	**5.4%**	**5.5%**	**5.6%**	**5.9%**	**4.6%**	**-0.6%**	**-1.3%**
Rest of Australia	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*0.0%*	*0.0%*
Victoria (reported STSA estimates)[2]	**5.3%**	**5.2%**	**5.2%**	**5.4%**	**5.4%**	**5.5%**	**5.8%**	**5.9%**	**6.0%**	**6.3%**	**4.9%**	**-0.6%**	**-1.4%**

Notes on the data

[1] 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 (eg. 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.

[2] These estimates may differ from the previously published data in the 2019-20 State Tourism Satellite Accounts and 2018-19 These estimates reflect the regional boundary definitions as noted in 2019-20. Some regional boundaries have subsequently changed in 2021 i.e. High Country and Yarra Valley and Dandenong Ranges.
Regional Tourism Satellite Accounts, by Tourism Research Australia.

- Back cast estimates from 2009-10 to 2019-20 in the table above are based on the same methodology and are comparable.

*AAG – Average Annual Growth

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Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

Victoria’s tourism regions 2009-10 to 2019-20 - Employment (000s)

	Tourism Employment												
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	AAG* 2014-15 to 2019-20	% Change 2018-19 vs 2019-20
Tourism Region	Employed Persons (000s)											% p.a.	%
Direct tourism contribution													
Melbourne	63.4	67.3	67.7	69.7	70.8	77.1	82.0	88.2	91.8	95.6	88.6	2.8%	-7.4%
Daylesford and the Macedon Ranges	2.9	2.9	2.9	2.9	2.9	3.0	3.3	3.6	3.9	4.2	3.9	5.2%	-7.3%
Geelong and the Bellarine	5.5	5.1	5.3	5.1	5.2	5.9	6.2	6.8	6.9	7.2	7.0	3.5%	-3.2%
Gippsland	6.8	7.5	6.8	7.6	7.4	7.3	7.1	7.8	7.9	8.4	8.9	4.0%	6.5%
Goldfields	5.5	6.1	6.5	6.3	6.3	6.9	6.6	7.8	7.7	8.4	7.3	1.1%	-13.3%
Grampians	2.3	2.5	2.5	2.6	2.6	2.8	2.8	3.1	3.4	3.6	3.8	6.5%	5.0%
Great Ocean Road	7.4	7.7	8.0	7.1	7.8	8.2	8.2	9.5	9.9	9.8	9.8	3.7%	0.0%
Mornington Peninsula	5.7	6.1	5.8	6.0	5.8	6.7	7.2	7.8	8.8	9.1	8.4	4.6%	-7.4%
Murray	8.9	8.8	8.6	9.4	9.2	9.9	9.4	10.6	11.1	11.1	10.8	1.9%	-2.5%
Phillip Island	3.3	3.1	3.5	3.9	3.3	3.0	3.6	3.9	3.7	4.5	3.8	4.8%	-15.3%
Victoria's High Country	6.2	6.7	6.5	6.1	5.4	7.1	6.8	7.2	8.9	10.1	8.1	2.7%	-20.5%
Yarra Valley and Dandenong Ranges	4.7	5.2	4.8	4.8	5.4	5.1	5.8	6.0	6.2	7.2	6.2	3.9%	-14.2%
Regional Victoria	**59.2**	**61.9**	**61.3**	**61.9**	**61.3**	**65.8**	**67.0**	**74.1**	**78.4**	**83.6**	**77.9**	**3.5%**	**-6.8%**
Victoria	**122.6**	**129.2**	**129.0**	**131.6**	**132.1**	**142.8**	**149.1**	**162.3**	**170.3**	**179.2**	**166.5**	**3.1%**	**-7.1%**
Indirect tourism contribution													
Melbourne	26.1	28.2	29.2	31.1	32.3	34.3	37.7	40.9	43.5	46.7	36.7	1.4%	-21.3%
Daylesford and the Macedon Ranges	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.7	0.8	0.8	0.7	3.5%	-18.6%
Geelong and the Bellarine	1.7	1.6	1.7	1.6	1.7	1.9	2.1	2.3	2.3	2.6	2.1	1.9%	-18.0%
Gippsland	1.8	2.0	1.9	2.1	2.2	2.1	2.1	2.3	2.3	2.6	2.3	2.2%	-10.8%
Goldfields	1.7	1.9	2.1	2.1	2.1	2.2	2.2	2.6	2.6	3.0	2.1	-1.0%	-27.9%
Grampians	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.7	0.8	0.9	0.8	4.5%	-9.5%
Great Ocean Road	2.1	2.2	2.4	2.2	2.5	2.5	2.6	3.0	3.2	3.3	2.8	2.2%	-14.9%
Mornington Peninsula	1.7	1.8	1.8	1.9	1.8	2.1	2.3	2.5	2.9	3.1	2.5	3.3%	-21.7%
Murray	2.3	2.3	2.3	2.6	2.6	2.7	2.7	3.0	3.2	3.3	2.7	0.1%	-17.7%
Phillip Island	0.9	0.8	1.0	1.2	1.0	0.9	1.1	1.1	1.1	1.4	1.0	3.1%	-28.7%
Victoria's High Country	1.6	1.7	1.8	1.7	1.5	2.0	2.0	2.0	2.6	3.2	2.1	1.2%	-33.9%
Yarra Valley and Dandenong Ranges	1.1	1.2	1.1	1.2	1.4	1.2	1.5	1.5	1.6	2.0	1.4	2.5%	-29.9%
Regional Victoria	**15.7**	**16.6**	**17.2**	**17.6**	**18.1**	**18.8**	**19.6**	**21.8**	**23.5**	**26.1**	**20.5**	**1.7%**	**-21.6%**
Victoria (internal contribution only)[1]	**41.8**	**44.7**	**46.5**	**48.6**	**50.4**	**53.2**	**57.3**	**62.7**	**67.0**	**72.8**	**57.2**	**1.5%**	**-21.4%**
Rest of Australia	*6.1*	*6.5*	*6.8*	*7.1*	*7.4*	*7.8*	*8.4*	*9.2*	*9.8*	*10.6*	*8.3*	*1.3%*	*-21.4%*
Victoria (reported STSA estimates)[2]	**47.9**	**51.2**	**53.2**	**55.8**	**57.8**	**60.9**	**65.7**	**71.9**	**76.8**	**83.3**	**65.5**	**1.5%**	**-21.4%**
Total tourism contribution													
Melbourne	89.5	95.5	96.9	100.8	103.1	111.4	119.7	129.2	135.3	142.3	125.3	2.4%	-12.0%
Daylesford and the Macedon Ranges	3.4	3.5	3.5	3.4	3.4	3.6	3.9	4.3	4.7	5.0	4.5	5.0%	-9.1%
Geelong and the Bellarine	7.2	6.7	7.0	6.8	6.9	7.8	8.3	9.1	9.3	9.8	9.1	3.1%	-7.1%
Gippsland	8.6	9.5	8.7	9.8	9.5	9.4	9.2	10.1	10.3	11.0	11.2	3.6%	2.4%
Goldfields	7.1	8.0	8.6	8.4	8.4	9.1	8.7	10.4	10.3	11.3	9.4	0.6%	-17.1%
Grampians	2.8	3.1	3.1	3.2	3.2	3.4	3.5	3.8	4.1	4.5	4.6	6.1%	2.2%
Great Ocean Road	9.6	9.9	10.4	9.2	10.3	10.7	10.8	12.5	13.1	13.1	12.6	3.4%	-3.7%
Mornington Peninsula	7.4	7.9	7.6	7.9	7.6	8.8	9.5	10.3	11.8	12.2	10.9	4.3%	-11.1%
Murray	11.2	11.1	10.9	12.0	11.8	12.6	12.1	13.6	14.3	14.4	13.6	1.5%	-6.0%
Phillip Island	4.2	3.9	4.6	5.1	4.4	3.9	4.6	5.0	4.8	5.9	4.8	4.5%	-18.5%
Victoria's High Country	7.7	8.5	8.4	7.8	6.9	9.0	8.8	9.3	11.5	13.3	10.2	2.4%	-23.7%
Yarra Valley and Dandenong Ranges	5.7	6.5	6.0	6.0	6.8	6.3	7.3	7.5	7.8	9.1	7.5	3.6%	-17.6%
Regional Victoria	**74.9**	**78.5**	**78.5**	**79.4**	**79.4**	**84.6**	**86.7**	**95.9**	**101.9**	**109.7**	**98.4**	**3.1%**	**-10.3%**
Victoria (internal contribution only)[1]	**164.4**	**173.9**	**175.5**	**180.2**	**182.4**	**196.0**	**206.4**	**225.0**	**237.3**	**252.0**	**223.7**	**2.7%**	**-11.2%**
Rest of Australia	*6.1*	*6.5*	*6.8*	*7.1*	*7.4*	*7.8*	*8.4*	*9.2*	*9.8*	*10.6*	*8.3*	*1.3%*	*-21.4%*
Victoria (reported STSA estimates)[2]	**171.0**	**180.4**	**182.3**	**187.4**	**189.8**	**203.8**	**214.8**	**234.2**	**247.1**	**262.6**	**232.0**	**2.6%**	**-11.6%**

Notes on the data

[1] 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 (eg. 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.

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Regional Tourism Satellite Accounts, by Tourism Research Australia.

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*AAG – Average Annual Growth

Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

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Victoria’s tourism regions 2009-10 to 2019-20 - Employment Share of Economy (%)

	Tourism Employment												
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	% Change 2014-15 to 2019-20	% Change 2018-19 vs 2019-20
Tourism Region	% Share of Economy											% pts	
Direct tourism contribution													
Melbourne	3.2%	3.3%	3.3%	3.4%	3.4%	3.6%	3.8%	3.9%	3.9%	4.0%	3.6%	0.0%	-0.3%
Daylesford and the Macedon Ranges	11.4%	11.3%	11.2%	10.7%	10.6%	10.7%	11.5%	12.0%	12.7%	13.2%	12.2%	1.4%	-1.1%
Geelong and the Bellarine	5.4%	4.9%	5.0%	4.8%	4.8%	5.3%	5.5%	5.8%	5.7%	5.8%	5.5%	0.2%	-0.2%
Gippsland	7.5%	8.0%	7.2%	8.0%	7.6%	7.3%	7.0%	7.3%	7.2%	7.4%	7.8%	0.5%	0.4%
Goldfields	5.0%	5.5%	5.7%	5.5%	5.4%	5.7%	5.3%	6.1%	5.8%	6.2%	5.3%	-0.4%	-0.9%
Grampians	6.6%	7.0%	7.0%	7.1%	7.0%	7.3%	7.1%	7.6%	8.0%	8.4%	8.7%	1.4%	0.3%
Great Ocean Road	13.4%	13.5%	13.9%	12.1%	13.2%	13.4%	13.1%	14.7%	14.8%	14.2%	14.1%	0.7%	-0.1%
Mornington Peninsula	6.1%	6.3%	5.9%	6.0%	5.7%	6.5%	6.8%	7.0%	7.8%	7.7%	7.1%	0.6%	-0.6%
Murray	7.2%	6.9%	6.7%	7.2%	7.0%	7.3%	6.8%	7.3%	7.5%	7.2%	7.0%	-0.3%	-0.2%
Phillip Island	33.0%	30.0%	33.7%	37.1%	31.1%	26.9%	31.2%	32.7%	30.2%	35.6%	29.9%	3.0%	-5.7%
Victoria's High Country	17.7%	18.8%	18.2%	16.7%	14.6%	18.6%	17.4%	17.8%	21.3%	23.5%	18.6%	0.0%	-5.0%
Yarra Valley and Dandenong Ranges	5.7%	6.3%	5.7%	5.6%	6.2%	5.7%	6.3%	6.2%	6.3%	7.1%	6.0%	0.3%	-1.1%
Regional Victoria	**7.8%**	**7.9%**	**7.8%**	**7.7%**	**7.6%**	**7.9%**	**7.8%**	**8.3%**	**8.6%**	**8.8%**	**8.2%**	**0.3%**	**-0.7%**
Victoria	**4.5%**	**4.6%**	**4.6%**	**4.6%**	**4.6%**	**4.8%**	**4.9%**	**5.1%**	**5.2%**	**5.3%**	**4.9%**	**0.1%**	**-0.4%**
Indirect tourism contribution													
Melbourne	1.3%	1.4%	1.4%	1.5%	1.6%	1.6%	1.7%	1.8%	1.9%	1.9%	1.5%	-0.1%	-0.4%
Daylesford and the Macedon Ranges	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.2%	2.3%	2.5%	2.6%	2.1%	0.1%	-0.5%
Geelong and the Bellarine	1.7%	1.5%	1.6%	1.5%	1.6%	1.7%	1.8%	1.9%	1.9%	2.0%	1.7%	-0.1%	-0.4%
Gippsland	1.9%	2.1%	2.0%	2.2%	2.2%	2.1%	2.0%	2.1%	2.1%	2.3%	2.0%	0.0%	-0.3%
Goldfields	1.5%	1.7%	1.8%	1.8%	1.8%	1.9%	1.8%	2.0%	2.0%	2.2%	1.6%	-0.3%	-0.6%
Grampians	1.4%	1.4%	1.5%	1.5%	1.6%	1.6%	1.6%	1.7%	1.8%	2.0%	1.8%	0.1%	-0.2%
Great Ocean Road	3.8%	3.9%	4.2%	3.7%	4.3%	4.1%	4.1%	4.6%	4.8%	4.8%	4.0%	-0.1%	-0.7%
Mornington Peninsula	1.8%	1.8%	1.8%	1.9%	1.8%	2.0%	2.2%	2.2%	2.6%	2.7%	2.1%	0.1%	-0.6%
Murray	1.8%	1.8%	1.8%	2.0%	2.0%	2.0%	1.9%	2.1%	2.2%	2.2%	1.8%	-0.2%	-0.4%
Phillip Island	9.0%	8.0%	9.8%	10.9%	9.5%	7.7%	9.3%	9.7%	9.0%	11.2%	7.9%	0.2%	-3.3%
Victoria's High Country	4.5%	4.9%	5.0%	4.6%	4.1%	5.2%	5.0%	5.0%	6.3%	7.4%	4.8%	-0.4%	-2.6%
Yarra Valley and Dandenong Ranges	1.3%	1.5%	1.4%	1.4%	1.6%	1.3%	1.6%	1.6%	1.6%	1.9%	1.3%	0.0%	-0.6%
Regional Victoria	**2.1%**	**2.1%**	**2.2%**	**2.2%**	**2.2%**	**2.3%**	**2.3%**	**2.4%**	**2.6%**	**2.8%**	**2.1%**	**-0.1%**	**-0.6%**
Victoria (internal contribution only)[1]	**1.5%**	**1.6%**	**1.6%**	**1.7%**	**1.7%**	**1.8%**	**1.9%**	**2.0%**	**2.1%**	**2.2%**	**1.7%**	**-0.1%**	**-0.5%**
Rest of Australia	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*0.0%*	*0.0%*
Victoria (reported STSA estimates)[2]	**1.8%**	**1.8%**	**1.9%**	**2.0%**	**2.0%**	**2.1%**	**2.2%**	**2.3%**	**2.4%**	**2.5%**	**1.9%**	**-0.1%**	**-0.5%**
Total tourism contribution													
Melbourne	4.6%	4.8%	4.8%	4.9%	5.0%	5.2%	5.5%	5.7%	5.8%	5.9%	5.1%	-0.1%	-0.7%
Daylesford and the Macedon Ranges	13.4%	13.3%	13.2%	12.7%	12.6%	12.8%	13.7%	14.3%	15.2%	15.9%	14.3%	1.5%	-1.6%
Geelong and the Bellarine	7.1%	6.4%	6.6%	6.4%	6.4%	7.0%	7.3%	7.7%	7.6%	7.8%	7.2%	0.2%	-0.6%
Gippsland	9.4%	10.1%	9.2%	10.2%	9.8%	9.4%	9.0%	9.4%	9.4%	9.7%	9.8%	0.4%	0.1%
Goldfields	6.5%	7.1%	7.6%	7.3%	7.3%	7.6%	7.1%	8.1%	7.8%	8.4%	6.9%	-0.8%	-1.5%
Grampians	8.0%	8.4%	8.4%	8.6%	8.5%	8.9%	8.7%	9.3%	9.8%	10.4%	10.5%	1.6%	0.1%
Great Ocean Road	17.2%	17.4%	18.1%	15.8%	17.5%	17.5%	17.3%	19.3%	19.5%	18.9%	18.1%	0.6%	-0.9%
Mornington Peninsula	7.8%	8.1%	7.8%	7.9%	7.6%	8.5%	8.9%	9.3%	10.3%	10.4%	9.2%	0.7%	-1.2%
Murray	9.0%	8.7%	8.5%	9.2%	9.0%	9.3%	8.7%	9.4%	9.6%	9.4%	8.8%	-0.5%	-0.6%
Phillip Island	42.0%	38.0%	43.5%	48.0%	40.5%	34.6%	40.5%	42.4%	39.2%	46.8%	37.8%	3.1%	-9.0%
Victoria's High Country	22.3%	23.7%	23.2%	21.2%	18.7%	23.8%	22.4%	22.9%	27.6%	30.9%	23.4%	-0.4%	-7.5%
Yarra Valley and Dandenong Ranges	7.0%	7.7%	7.0%	7.0%	7.8%	7.0%	7.9%	7.8%	7.9%	9.0%	7.3%	0.3%	-1.6%
Regional Victoria	**9.8%**	**10.0%**	**9.9%**	**9.9%**	**9.8%**	**10.1%**	**10.1%**	**10.7%**	**11.1%**	**11.6%**	**10.3%**	**0.2%**	**-1.3%**
Victoria (internal contribution only)[1]	**6.1%**	**6.2%**	**6.2%**	**6.3%**	**6.3%**	**6.6%**	**6.8%**	**7.1%**	**7.3%**	**7.5%**	**6.6%**	**0.0%**	**-0.9%**
Rest of Australia	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*NA*	*0.0%*	*0.0%*
Victoria (reported STSA estimates)[2]	**6.3%**	**6.5%**	**6.5%**	**6.6%**	**6.6%**	**6.9%**	**7.1%**	**7.4%**	**7.6%**	**7.8%**	**6.8%**	**0.0%**	**-1.0%**

Notes on the data

[1] 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 (eg. 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.

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Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

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Appendix D – Consumption and GVA tables

Consumption by Visitor Category: Melbourne, Regional Victoria and Victoria

Consumption by Visitor Category	Melbourne			Regional Victoria			Victoria		
	2019-20 ($ M)	Change on 2018-19	2019-20 % share	2019-20 ($ M)	Change on 2018-19	2019-20 % share	2019-20 ($ M)	Change on 2018-19	2019-20 % share
International Overnight	$8,238	-17.0%	47.7%	$609	-35.7%	5.1%	$8,847	-18.6%	30.3%
Interstate Overnight	$5,105	-21.7%	29.5%	$1,428	-23.8%	12.0%	$6,532	-22.2%	22.4%
Intrastate Overnight	$1,788	-20.5%	10.4%	$6,568	-19.3%	55.2%	$8,357	-19.5%	28.7%
Daytrips	$2,146	-16.3%	12.4%	$3,285	-17.2%	27.6%	$5,431	-16.8%	18.6%
Total	**$17,277**	**-18.7%**	**100%**	**$11,890**	**-20.3%**	**100%**	**$29,166**	**-19.4%**	**100%**

Industry Direct GVA: Melbourne, Regional Victoria and Victoria

Industry Share of Direct Tourism GVA	Melbourne			Regional Victoria			Victoria		
	2018-19 ($ M)	2019-20 ($ M)	Change on 2018-19	2018-19 ($ M)	2019-20 ($ M)	Change on 2018-19	2018-19 ($ M)	2019-20 ($ M)	Change on 2018-19
Accommodation	$1,691	$1,549	-8.4%	$793	$706	-11.0%	$2,483	$2,255	-9.2%
Food Services	$1,247	$972	-22.0%	$1,040	$831	-20.1%	$2,287	$1,804	-21.1%
Transport	$1,807	$1,280	-29.1%	$697	$513	-26.4%	$2,504	$1,794	-28.4%
Travel agency and tour operator services	$817	$524	-35.9%	$507	$334	-34.1%	$1,324	$858	-35.2%
Education and training	$1,532	$1,509	-1.5%	$324	$278	-14.2%	$1,856	$1,788	-3.7%
Retail Trade	$1,045	$926	-11.4%	$665	$597	-10.1%	$1,710	$1,523	-10.9%
Recreational Activities	$439	$365	-16.9%	$219	$186	-15.4%	$658	$550	-16.4%
All other industries	$514	$376	-26.8%	$250	$179	-28.5%	$764	$555	-27.4%
Total	**$9,090**	**$7,502**	**-17.5%**	**$4,496**	**$3,625**	**-19.4%**	**$13,586**	**$11,127**	**-18.1%**

Notes on the data

[2] These estimates may differ from the previously published data in the 2019-20 State Tourism Satellite Accounts and 2018-19 Regional Tourism Satellite Accounts, by Tourism Research Australia.

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Source Regional TSA model 2019-20, Tourism Research Australia, Canberra, July 2021.

Report produced by the Tourism, Events and Visitor Economy (TEVE) Research Unit

Department of Jobs, Precincts and Regions
Victorian Government

Report published in July 2021

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