

Yarra Valley and Dandenong Ranges

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 Yarra Valley and Dandenong Ranges¹. The region received approximately 3.3 million domestic (overnight and daytrip) visitors, who spent an estimated \$464 million in the year ending December 2021.

GROSS REGIONAL PRODUCT*



GRP	% OF ECONOMY
\$550M ▼-29% y/y	5.4% ▼-2.4%pts

TOURISM EMPLOYMENT*



JOBS	% OF ECONOMY
7,500 ▼-18% y/y	7.3% ▼-1.6%pts

DOMESTIC OVERNIGHT



SPEND	VISITORS
\$218M +112% y/y	572,000 +38% y/y
▼ -21% 2019/21	▼ -31% 2019/21

DOMESTIC DAYTRIPS



SPEND	DAYTRIPS
\$246M +66% y/y	2.7M +42% y/y
▼ -44% 2019/21	▼ -45% 2019/21

VALUE OF TOURISM

In 2019-20, tourism was estimated to be worth \$550 million to the region's economy (in direct and indirect Gross Regional Product), representing 5.4 per cent of the region's economy.

Tourism generated employment of approximately 7,500 people or 7.3 per cent of the region's employment (direct and indirect jobs).

DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Yarra Valley and Dandenong Ranges in the year ending December 2021 was estimated to be \$218 million, up 112 per cent on 2020 during a period of low activity. However, overnight spend remained 21 per cent below the year ending December 2019 (pre-COVID) result. Visitors spent an average of \$155 per night and \$381 per visitor in 2021.

DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$246 million in the year ending December 2021, a decrease of 44 per cent compared to the year ending December 2019. However, daytrip spend was up 66 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.

All growth rates noted on this page are year-on-year percentage changes.

Data correct at time of publishing. Factsheet published by the Tourism and Events Strategy and Reform (TESR) Research Unit, March 2022.

Image: Yarra Valley

Yarra Valley and Dandenong Ranges

Key Regional Tourism Statistics

Tourism Economic Contribution	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	YOY change (2019-20) (%)
Gross Regional Product (GRP)							
Direct GRP (\$m)	270	312	329	351	431	317	-26%
Indirect GRP (\$m)	214	258	263	278	341	233	-32%
Total GRP (\$m)	483	570	592	629	772	550	-29%
Direct GRP (%)	3.3%	3.7%	3.7%	3.8%	4.3%	3.1%	-12%pts
Indirect GRP (%)	2.6%	3.1%	2.9%	3.0%	3.4%	2.3%	-1.1%pts
Total GRP (%)	5.9%	6.8%	6.6%	6.7%	7.7%	5.4%	-2.4%pts
Persons Employed							
Direct Employment (000s)	5.1	5.8	6.0	6.2	7.2	6.2	-14%
Indirect Employment (000s)	1.2	1.5	1.5	1.6	2.0	1.4	-30%
Total Employment (000s)	6.3	7.3	7.5	7.8	9.1	7.5	-18%
Direct Employment (%)	5.7%	6.3%	6.2%	6.3%	7.1%	6.0%	-1.1%pts
Indirect Employment (%)	1.3%	1.6%	1.6%	1.6%	1.9%	1.3%	-0.6%pts
Total Employment (%)	7.0%	7.9%	7.8%	7.9%	9.0%	7.3%	-1.6%pts

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
Domestic									
Daytrip visitors (000's)	3,680	3,787	4,063	5,007	1,932	2,750	42%	-45%	82.8%
Overnight visitors (000's)	627	681	628	835	414	572	38%	-31%	17.2%
Total domestic visitors (000's)	4,307	4,468	4,691	5,842	2,346	3,322	42%	-43%	100.0%
Visitor nights (000's)	1,575	1,666	1,506	2,019	832	1,409	69%	-30%	100.0%
Length of stay (nights)	2.5	2.4	2.4	2.4	2.0	2.5			
Daytrip Expenditure (\$m)	287	332	286	436	148	246	66%	-44%	53.0%
Daytrip spend per trip	78	88	70	87	77	89			
Domestic Overnight Expenditure (\$m)	195	235	261	277	103	218	112%	-21%	47.0%
Domestic Overnight Spend per Visitor (\$)	310	345	416	332	249	381			
Domestic Overnight Spend per Night (\$)	123	141	174	137	124	155			
Total Domestic Expenditure (\$m)	482	567	547	713	251	464	85%	-35%	100.0%
International									
Overnight visitors (000's)	46	44	44	62	13	-	-	-	-
Visitor nights (000's)	700	805	816	1,317	-	-	-	-	-
Length of stay (nights)	15.3	18.3	18.5	21.1	-	-			
International Overnight Expenditure (\$m)	35	51	-	59	9	-	-	-	-
International Overnight Spend per Visitor (\$)	766	1,157	-	949	704	-			
International Overnight Spend per Night (\$)	50	63	-	45	-	-			

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 (RTSA) results (eg. 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.

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



Jobs,
Precincts
and Regions

Yarra Valley and Dandenong Ranges

¹Yarra Valley and Dandenong Ranges Tourism Region definition – SA2s

Each tourism region is defined using smaller geographical building blocks called Statistical Areas Level 2 (SA2s), developed by the Australian Bureau of Statistics. SA2s do not precisely align with the boundaries of Local Government Areas (LGAs). For further information refer:

[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 the Yarra Valley and Dandenong Ranges tourism region (from January 2021):

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

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.