

Yarra Valley and Dandenong Ranges

Regional Tourism Summary

Year Ending December 2020



Travel in 2020 was severely impacted by the coronavirus (COVID-19) pandemic, with significant rates of decline recorded across all top-level measures as a result of the restrictions on travel that were progressively implemented from February 2020.

Tourism is an important industry for Yarra Valley and Dandenong Ranges. The region received approximately 3.0 million domestic (overnight and daytrip) and international overnight visitors combined, who spent an estimated \$322 million in the year ending December 2020.

The Yarra Valley Dandenong Ranges tourism region comprises two tourism sub-regions: Melbourne East and Upper Yarra.¹

GROSS REGIONAL PRODUCT



GRP	% OF ECONOMY
\$778M ▲ 21%	7.8% ▲ 1.0%pt

VALUE OF TOURISM

In 2018-19, tourism was estimated to be worth \$778 million to the region's economy (in direct and indirect Gross Regional Product), representing 7.8 per cent of the region's economy.

TOURISM EMPLOYMENT



JOBS	% OF ECONOMY
9,300 ▲ 16%	9.1% ▲ 1.0pt

Tourism generated employment of approximately 9,300 people or 9.1 per cent of the region's employment (direct and indirect jobs).

DOMESTIC OVERNIGHT



SPEND	VISITORS
\$131M ▼ -64%	559,000 ▼ -52%

DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Yarra Valley and Dandenong Ranges in the year ending December 2020 was estimated to be \$131 million (-64 per cent year-on-year), with visitors spending an average of \$111 per night and \$235 per visitor.

DOMESTIC DAYTRIPS



SPEND	DAYTRIPS
\$180M ▼ -63%	2.4M ▼ -58%

DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$180 million in the year ending December 2020, a decrease of 63 per cent compared to the previous year.

INTERNATIONAL OVERNIGHT



SPEND	VISITORS
\$11M ▼ -82%	14,000 ▼ -79%

INTERNATIONAL OVERNIGHT SPEND

International overnight expenditure in the Yarra Valley and Dandenong Ranges was estimated to be \$11 million in the year ending December 2020, a decrease of 82 per cent year-on-year.

Sources: National and International Visitor Surveys and Regional Expenditure Model, December 2020, Tourism Research Australia (TRA), released March 2021. Regional Tourism Satellite Account 2018-19, TRA, released September 2020. All growth rates noted on this page are year-on-year percentage changes. Data correct at time of publishing. Factsheet published by the Tourism, Events and Visitor Economy (TEVE) Research Unit, March 2021. Image: Yarra Valley

Yarra Valley and Dandenong Ranges

Key Regional Tourism Statistics

Tourism Economic Contribution	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	AAG (2014-19) (% p.a.)	YOY change (2018-19) (%)
Gross Regional Product (GRP)								
Direct GRP (\$m)	302	276	319	335	357	433	7% p.a.	21%
Indirect GRP (\$m)	259	220	264	269	285	345	6% p.a.	21%
Total GRP (\$m)	561	496	583	604	641	778	7% p.a.	21%
Direct GRP (%)	3.9%	3.3%	3.8%	3.7%	3.8%	4.4%	0.5%pt	0.5%pt
Indirect GRP (%)	3.3%	2.7%	3.1%	3.0%	3.0%	3.5%	0.2%pt	0.4%pt
Total GRP (%)	7.2%	6.0%	6.9%	6.7%	6.9%	7.8%	0.7%pt	1.0%pt
Persons Employed								
Direct Employment (000s)	5.5	5.2	5.9	6.1	6.4	7.3	6% p.a.	14%
Indirect Employment (000s)	1.5	1.2	1.5	1.5	1.6	2.0	6% p.a.	21%
Total Employment (000s)	7.0	6.5	7.4	7.6	8.0	9.3	6% p.a.	16%
Direct Employment (%)	6.3%	5.8%	6.4%	6.3%	6.5%	7.2%	0.8%pt	0.7%pt
Indirect Employment (%)	1.7%	1.4%	1.6%	1.6%	1.7%	1.9%	0.3%pt	0.3%pt
Total Employment (%)	8.0%	7.2%	8.1%	7.9%	8.1%	9.1%	1.1%pt	1.0%pt

Visitors, Nights and Expenditure	YE Dec 2015	YE Dec 2016	YE Dec 2017	YE Dec 2018	YE Dec 2019	YE Dec 2020	AAG (YE Dec 2015-20) (% p.a.)	YOY change (YE Dec 2019- 20) (%)	YE Dec 20 Share of Total
Domestic									
Daytrip visitors (000's)	3,966	4,317	4,453	4,888	5,767	2,437	-9% p.a.	-58%	81.0%
Overnight visitors (000's)	762	840	1,010	863	1,158	559	-6% p.a.	-52%	18.6%
Total domestic visitors (000's)	4,729	5,157	5,463	5,751	6,925	2,996	-9% p.a.	-57%	99.5%
Visitor nights (000's)	1,903	2,020	2,375	2,081	2,719	1,188	-9% p.a.	-56%	80.8%
Length of stay (nights)	2.5	2.4	2.4	2.4	2.3	2.1			
Daytrip Expenditure (\$m)	277	327	367	350	490	180	-8% p.a.	-63%	56.0%
Daytrip spend per trip	70	76	82	72	85	74			
Domestic Overnight Expenditure (\$m)	231	238	321	313	361	131	-11% p.a.	-64%	40.8%
Domestic Overnight Spend per Visitor (\$)	303	284	317	362	312	235			
Domestic Overnight Spend per Night (\$)	121	118	135	150	133	111			
Total Domestic Expenditure (\$m)	508	565	687	662	851	312	-9% p.a.	-63%	96.7%
International									
Overnight visitors (000's)	42	49	47	47	65	14	-20% p.a.	-79%	0.5%
Visitor nights (000's)	739	743	822	858	1,371	283	-18% p.a.	-79%	19.2%
Length of stay (nights)	17.8	15.2	17.3	18.2	21.0	20.3			
International Overnight Expenditure (\$m)	39	36	51	-	60	11	-23% p.a.	-82%	3.3%
International Overnight Spend per Visitor (\$)	932	737	1,079	-	917	753			
International Overnight Spend per Night (\$)	52	49	62	-	44	37			
TOTALS									
Visitors (000's)	4,770	5,206	5,511	5,798	6,990	3,010	-9% p.a.	-57%	
Visitor nights (000's)	2,642	2,763	3,196	2,939	4,090	1,471	-11% p.a.	-64%	
Expenditure (\$m)	546	601	739	724	911	322	-10% p.a.	-65%	

Sources: National and International Visitor Surveys and Regional Expenditure Model, December 2020, TRA, released March 2021.

Regional Tourism Satellite Account 2018-19, TRA, released September 2020.

Improvements in the NVS methodology has resulted in a break in series. Please use caution when comparing 2020 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.

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

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Jobs,
Precincts
and Regions

Yarra Valley and Dandenong Ranges

¹ Yarra Valley and Dandenong Ranges Tourism Region definition – SA2s

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

<http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/9503.0.55.0012016?OpenDocument>

The following SA2s are included in the Yarra Valley and Dandenong Ranges tourism region:

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

Regional Map

The Tourism, Events and Visitor Economy (TEVE) branch of the Victorian Government has developed a map noting Victoria's tourism sub-regions as defined by the Australian Bureau of Statistics. These definitions form the basis of data reported from the National Visitor Survey and the International Visitor Survey. This document also outlines SA2s and LGAs as they relate to the regions. Refer to:

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

More Information

For 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. Estimates for Melbourne are calculated using the main state of stay as Victoria. For the year ending December 2020 measures, individual regions are calculated using the three months from January to March 2020. The combined regional Victoria estimates (balance) include additional international visitors that are unallocated to a destination, reflecting that we do not know where in Victoria they went (as that information is usually gathered through the survey interview process) and with minimal impact on results for the period (~1-2%).

For further information on the methodology and key concepts for the Regional Tourism Satellite Accounts 2018-19, 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.