

# Melbourne

## Tourism Summary

Year Ending December 2017



Tourism is an important industry for the Melbourne tourism region. Melbourne received approximately 29.5 million domestic (overnight and daytrip) and international overnight visitors combined, who spent an estimated \$16.8 billion in the year ending December 2017.



### GROSS REGIONAL PRODUCT

GRP	% OF ECONOMY
\$15.3 B ▲ 10.0%	5.4% ▲ 0.3%pts

### VALUE OF TOURISM

In 2015-16, tourism was estimated to be worth \$15.3 billion to Melbourne's economy (in direct and indirect Gross Regional Product), representing 5.4 per cent of Melbourne's economy.



### TOURISM EMPLOYMENT

JOBS	% OF ECONOMY
126,800 ▲ 5.7%	6.0% ▲ 0.2% pts

Tourism generated employment of approximately 126,800 people or 6.0 per cent of total employment (direct and indirect jobs).



### DOMESTIC OVERNIGHT

SPEND	VISITORS
\$7.7 B ▲ 9.3%	9.3 M ▲ 7.2%

### DOMESTIC OVERNIGHT SPEND

Domestic overnight expenditure in Melbourne in the year ending December 2017 was estimated to be \$7.7 billion (+9.3 per cent year-on-year), with visitors spending an average of \$304 per night and \$835 per visitor.



### DOMESTIC DAYTRIPS

SPEND	DAYTRIPS
\$2.0 B ▲ 7.6%	17.5 M ▲ 5.0%

### DOMESTIC DAYTRIP SPEND

Daytrip visitors spent an estimated \$2.0 billion in the year ending December 2017, an increase of 7.6 per cent compared to the previous year.



### INTERNATIONAL OVERNIGHT

SPEND	VISITORS
\$7.1 B ▲ 10.7%	2.7 M ▲ 8.2%

### INTERNATIONAL OVERNIGHT SPEND

International overnight expenditure in Melbourne was estimated to be \$7.1 billion in the year ending December 2017, an increase of 10.7 per cent year-on-year.

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## Key Regional Tourism Statistics (Year ending December)

Tourism Economic Contribution	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	AAG (2011-16) (% p.a.)	YOY change (2016-17) (%)
<b>Gross Regional Product (GRP)</b>								
Direct GRP (\$m)	5,985	6,309	6,492	6,682	7,327	8,071	6.2%	10.1%
Indirect GRP (\$m)	5,527	5,955	6,105	6,269	6,618	7,263	5.6%	9.7%
<b>Total GRP (\$m)</b>	<b>11,512</b>	<b>12,263</b>	<b>12,597</b>	<b>12,950</b>	<b>13,945</b>	<b>15,334</b>	<b>5.9%</b>	<b>10.0%</b>
Direct GRP (%)	2.5%	2.5%	2.5%	2.5%	2.7%	2.8%	0.3%pt	0.2%pt
Indirect GRP (%)	2.3%	2.4%	2.4%	2.4%	2.4%	2.5%	0.2%pt	0.1%pt
<b>Total GRP (%)</b>	<b>4.8%</b>	<b>4.9%</b>	<b>4.9%</b>	<b>4.9%</b>	<b>5.1%</b>	<b>5.4%</b>	<b>0.5%pt</b>	<b>0.3%pt</b>
<b>Persons Employed</b>								
Direct Employment (000s)	75.8	75.4	75.9	75.2	79.2	81.9	1.6%	3.5%
Indirect Employment (000s)	34.5	35.5	37.6	38.4	40.8	44.9	5.4%	10.0%
<b>Total Employment (000s)</b>	<b>110.3</b>	<b>110.9</b>	<b>113.5</b>	<b>113.6</b>	<b>119.9</b>	<b>126.8</b>	<b>2.8%</b>	<b>5.7%</b>
Direct Employment (%)	3.8%	3.8%	3.8%	3.7%	3.8%	3.9%	0.0%pt	0.0%pt
Indirect Employment (%)	1.8%	1.8%	1.9%	1.9%	2.0%	2.1%	0.4%pt	0.1%pt
<b>Total Employment (%)</b>	<b>5.6%</b>	<b>5.6%</b>	<b>5.7%</b>	<b>5.6%</b>	<b>5.8%</b>	<b>6.0%</b>	<b>0.4%pt</b>	<b>0.2%pt</b>

Year ending December 2017	2012	2013	2014	2015	2016	2017	AAG (2012-17) (% p.a.)	YOY change (2016-17) (%)	2017 Share of Total
<b>Visitors, Nights and Expenditure</b>									
<b>Domestic</b>									
Daytrip visitors (000's)	17,045	16,116	14,940	15,587	16,663	17,498	0.5%	5.0%	59.3%
Overnight visitors (000's)	7,033	7,074	7,803	8,080	8,630	9,251	5.6%	7.2%	31.4%
Total domestic visitors (000's)	24,078	23,190	22,742	23,667	25,293	26,749	2.1%	5.8%	90.7%
Visitor nights (000's)	20,295	19,650	22,209	22,516	24,565	25,436	4.6%	3.5%	30.4%
Length of stay (nights)	2.9	2.8	2.8	2.8	2.8	2.7			
Daytrip Expenditure (\$m)	1,985	1,892	1,668	1,707	1,847	1,987	0.0%	7.6%	11.8%
Daytrip spend per trip	116	117	112	109	111	114			
Domestic Overnight Expenditure (\$m)	5,962	5,655	6,497	6,530	7,068	7,724	5.3%	9.3%	45.9%
Domestic Overnight Spend per Visitor (\$)	848	799	833	808	819	835			
Domestic Overnight Spend per Night (\$)	294	288	293	290	288	304			
Total Domestic Expenditure (\$m)	7,947	7,546	8,165	8,236	8,914	9,711	4.1%	8.9%	57.7%
<b>International</b>									
Overnight visitors (000's)	1,677	1,857	2,026	2,312	2,535	2,741	10.3%	8.2%	9.3%
Visitor nights (000's)	39,941	42,900	43,612	51,254	55,724	58,227	7.8%	4.5%	69.6%
Length of stay (nights)	24	23	22	22	22	21			
International Overnight Expenditure (\$m)	4,002	4,456	4,626	6,081	6,435	7,122	12.2%	10.7%	42.3%
International Overnight Spend per Visitor (\$)	2,387	2,400	2,284	2,630	2,539	2,598			
International Overnight Spend per Night (\$)	100	104	106	119	115	122			
<b>TOTALS</b>									
Visitors (000's)	25,755	25,047	24,768	25,979	27,827	29,490	2.7%	6.0%	
Visitor nights (000's)	60,236	62,550	65,821	73,770	80,289	83,663	6.8%	4.2%	
Expenditure (\$m)	11,950	12,002	12,790	14,317	15,349	16,833	7.1%	9.7%	

Sources: National and International Visitor Survey, Regional Expenditure Model, December 2017, Tourism Research Australia.  
Regional Tourism Satellite Account 2015-16, Deloitte Access Economics for DEDJTR.

Note: Figures noted as '-' are under the publishable threshold.

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

# Melbourne

## <sup>1</sup> Melbourne 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 Melbourne tourism region:

Region Melbourne

### SA2

Abbotsford, Airport West, Albert Park, Alphington – Fairfield, Altona, Altona Meadows, Altona North, Ardeer – Albion, Armadale, Ascot Vale, Ashburton, Ashwood – Chadstone, Aspendale Gardens – Waterways, Balwyn, Balwyn North, Bayswater, Bayswater North, Beaumaris, Bentleigh – McKinnon, Bentleigh East, Berwick – North, Berwick – South, Blackburn, Blackburn South, Boronia – The Basin, Box Hill, Box Hill North, Braeside, Braybrook, Brighton, Brighton East, Broadmeadows, Brunswick, Brunswick East, Brunswick West, Bulleen, Bundoora – East, Bundoora – North, Bundoora – West, Burwood, Burwood East, Cairnlea, Camberwell, Campbellfield – Coolaroo, Carlton, Carlton North – Princes Hill, Carnegie, Caroline Springs, Carrum – Patterson Lakes, Caulfield – North, Caulfield – South, Chelsea – Bonbeach, Chelsea Heights, Cheltenham – Highett (East), Cheltenham – Highett (West), Clarinda – Oakleigh South, Clayton, Clayton South, Coburg, Coburg North, Collingwood, Craigieburn – Mickleham, Cranbourne, Cranbourne East, Cranbourne North, Cranbourne South, Cranbourne West, Croydon, Croydon Hills – Warranwood, Dandenong, Dandenong North, Deer Park – Derrimut, Delahey, Dingley Village, Docklands, Doncaster, Doncaster East, Donvale – Park Orchards, Doveton, East Melbourne, Edithvale – Aspendale, Elsternwick, Elwood, Endeavour Hills, Epping, Essendon – Aberfeldie, Essendon Airport, Fawkner, Ferntree Gully, Fitzroy, Fitzroy North, Flemington, Flemington Racecourse, Footscray, Forest Hill, Gladstone Park – Westmeadows, Glen Iris – East, Glen Waverley – East, Glen Waverley – West, Glenroy – Hadfield, Greensborough, Greenvale – Bulla, Hallam, Hampton, Hampton Park – Lynbrook, Hawthorn, Hawthorn East, Heidelberg – Rosanna, Heidelberg West, Hillside, Hoppers Crossing – North, Hoppers Crossing – South, Hughesdale, Ivanhoe, Ivanhoe East – Eaglemont, Keilor, Keilor Downs, Keilor East, Kensington, Kew, Kew East, Keysborough, Kings Park, Kingsbury, Knoxfield – Scoresby, Lalor, Laverton, Lynbrook – Lyndhurst, Lysterfield, Malvern – Glen Iris, Malvern East, Maribyrnong, Meadow Heights, Melbourne, Melbourne Airport, Melton, Melton South, Melton West, Mentone, Mill Park – North, Mill Park – South, Mitcham, Montmorency – Briar Hill, Moonee Ponds, Moorabbin – Heatherton, Moorabbin Airport, Mordialloc – Parkdale, Mount Waverley – North, Mount Waverley – South, Mulgrave, Murrumbeena, Narre Warren, Narre Warren North, Narre Warren South, Newport, Niddrie – Essendon West, Noble Park, Noble Park North, North Melbourne, Northcote, Nunawading, Oakleigh – Huntingdale, Ormond – Glen Huntly, Parkville, Pascoe Vale, Pascoe Vale South, Pearcedale – Tooradin, Point Cook, Port Melbourne, Port Melbourne Industrial, Prahran – Windsor, Preston, Reservoir – East, Reservoir – West, Richmond, Ringwood, Ringwood East, Ringwood North, Rockbank – Mount Cottrell, Rowville – Central, Rowville – North, Rowville – South, Roxburgh Park – Somerton, Sandringham – Black Rock, Seabrook, Seddon – Kingsville, South Melbourne, South Morang, South Yarra – East, South Yarra – West, Southbank, Springvale, Springvale South, St Albans – North, St Albans – South, St Kilda, St Kilda East, Strathmore, Sunbury, Sunbury – South, Sunshine, Sunshine North, Sunshine West, Surrey Hills (East) – Mont Albert, Surrey Hills (West) – Canterbury, Sydenham, Tarneit, Taylors Hill, Taylors Lakes, Templestowe, Templestowe Lower, Thomastown, Thornbury, Toorak, Truganina, Tullamarine, Vermont, Vermont South, Viewbank – Yallambie, Wantirna, Wantirna South, Warrandyte – Wonga Park, Watsonia, Werribee, Werribee – South, West Footscray – Tottenham, West Melbourne, Wheelers Hill, Whittlesea, Williamstown, Wyndham Vale, Yarra – North, Yarraville

## 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 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>

For further information on the methodology and key concepts for the Victorian Regional Tourism Satellite Accounts 2015-16, please refer to the Regional Tourism Satellite Account profiles at:

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

For more detail on the State Tourism Satellite Accounts 2016-17, published by Tourism Research Australia refer to the full report:

<https://www.tra.gov.au/research/view-all-publications/all-publications/economic-reports/state-tourism-satellite-accounts-2016-17>