

# Tourism's economic contribution to the Grampians

For the period July 2019 to June 2020



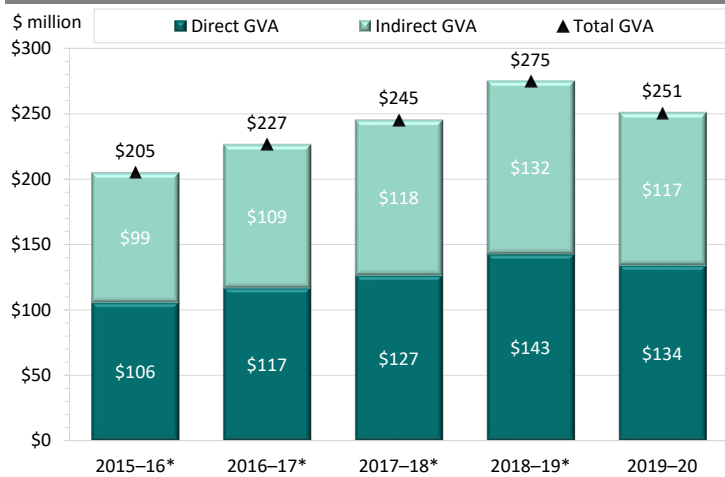
## Overview

Particulars	2019–20	Change on 2018–19*	Ranked amongst regions <sup>1</sup> in regional Victoria	Tourism's share of total regional economy
Gross Value Added (\$ million)	\$251	-8.7%	10	+5.9%
Gross Regional Product (\$ million)	\$279	-9.2%	10	+6.1%
Employment (persons)	4,618	+2.2%	10	+10.5%
Consumption (\$ million)	\$563	-7.4%	10	

## Regional Tourism Satellite Account (RTSA)

The regional Tourism Satellite Account (RTSA) 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 regional TSA methodology has been extended to determine the indirect impact of cross region trade flows).

## Gross Value Added (GVA)



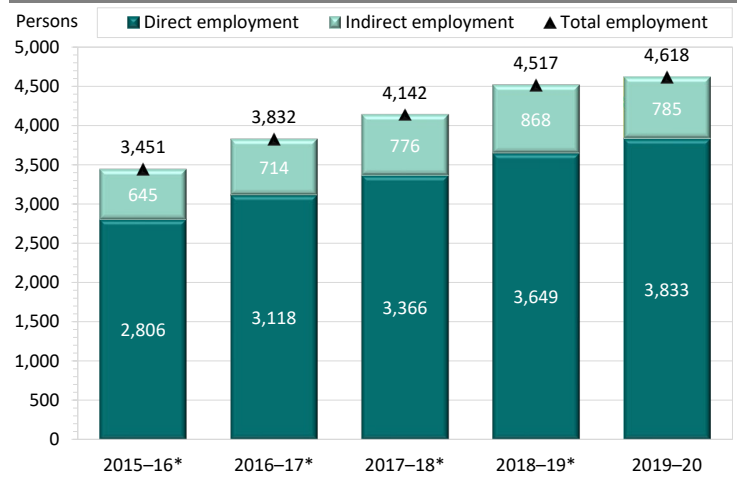
The Grampians region generated \$251 million in total tourism GVA (\$134 million in direct and \$117 million in indirect) – down by 8.7% on 2018-19\*. Total tourism GVA represented 5.9% of the regional economy's GVA. This was 2.4% pts lower than for regional Victoria (8.3%).

## Industry sector by direct tourism GVA

Industry sector	\$ million (basic prices)	%
Accommodation, incl ownership of dwellings	\$31	23.3%
Retail trade	\$23	17.1%
Cafes, restaurants and takeaway food services	\$19	14.3%
Travel agency and tour operator services	\$13	9.4%
Transport	\$12	8.9%
Clubs, pubs, taverns and bars	\$12	8.8%
Education and training	\$9	6.7%
Other sports and recreation services	\$3	2.3%
Cultural services	\$3	2.2%
Casinos and other gambling services	\$1	0.8%
All other industries	\$8	6.2%
<b>Total direct tourism GVA</b>	<b>\$134</b>	

'Accommodation, incl ownership of dwellings' (\$31 million) contributed the most to direct tourism GVA in the region. 'Retail trade' (\$23 million) was the 2<sup>nd</sup> biggest industry sector, followed by 'cafes, restaurants and takeaway food services' (\$19 million).

## Employment



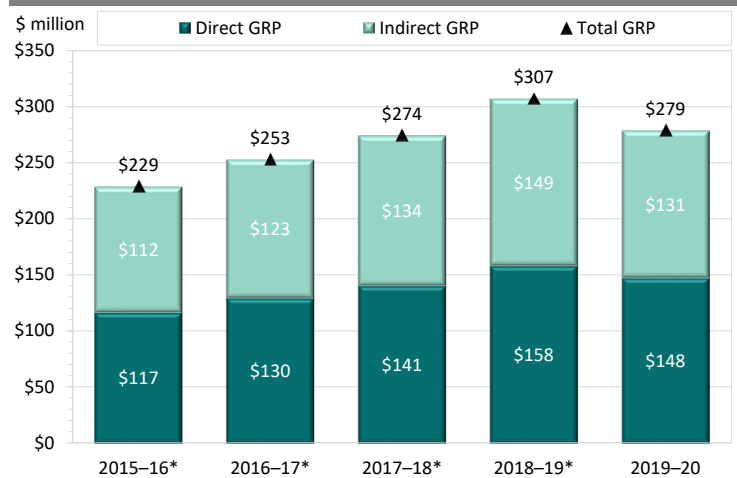
The region generated 4,618 jobs for people employed in the tourism industry (3,833 direct and 785 in indirect employment) – up by 2.2% on 2018-19\*. Total tourism employment represented 10.5% of the regional economy's employment. This was 0.7% pts lower than for regional Victoria (11.2%).

## Industry sector by direct tourism employment

Industry sector	Employed persons	%
Cafes, restaurants and takeaway food services	1,530	39.9%
Accommodation	759	19.8%
Retail trade	486	12.7%
Clubs, pubs, taverns and bars	286	7.5%
Transport	195	5.1%
Travel agency and tour operator services	131	3.4%
Education and training	123	3.2%
Other sports and recreation services	116	3.0%
Cultural services	98	2.6%
All other industries	109	2.8%
<b>Total direct tourism employment</b>	<b>3,833</b>	

'Cafes, restaurants and takeaway food services' (1,530 persons) contributed the most to direct tourism employment in the region, followed by 'accommodation' (759 persons).

## Gross Regional Product (GRP)



The region generated \$279 million in total tourism GRP (\$148 million in direct and \$131 million in indirect) – down by 9.2% on 2018-19\*. Total tourism GRP represented 6.1% of the regional economy's GRP. This was 2.4% pts lower than for regional Victoria (8.5%).

\* the results for 2015-16, 2016-17, 2017-18 and 2018-19 are smoothed, i.e. based on a 3-year average.

The Grampians comprises: Central Highland, Western Grampians and Wimmera tourism regions.

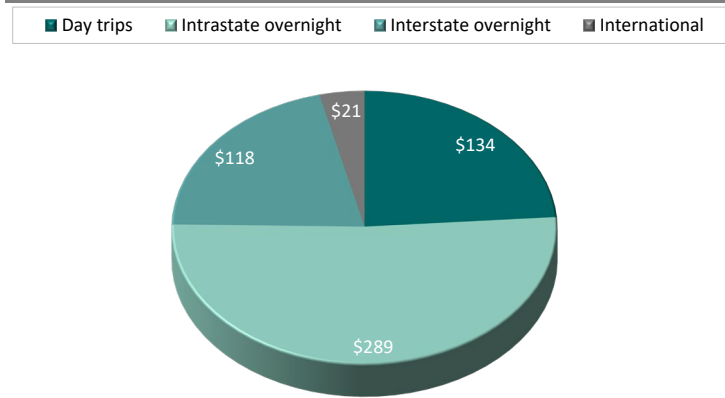
Source: Regional Tourism Satellite Accounts, 2019-20, Tourism Research Australia

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### Consumption



Total Tourism Consumption \$563 million

Total tourism consumption in region was \$563 million – down by 7.4% on 2018-19\*. 'Intrastate overnight' (\$289 million) was the biggest visitor segment, followed by 'day trips' (\$134 million) and 'interstate overnight' (\$118 million).

### Top tourism products by consumption

Tourism product	\$ million (purchasers' prices)	%
Takeaway and restaurant meals	\$99	17.6%
Long distance passenger transportation	\$87	15.4%
Shopping (incl gifts and souvenirs)	\$74	13.2%
Fuel (petrol and diesel)	\$58	10.3%
Accommodation services	\$48	8.5%
Recreational, cultural and sporting services	\$42	7.4%
Other tourism goods and services	\$156	27.6%
Total tourism consumption	\$563	

Visitors spent more on 'takeaway and restaurant meals' (\$99 million) than on any other tourism product in the region. 'Long distance passenger transportation' (\$87 million) was the 2<sup>nd</sup> biggest tourism product.

### Economic importance of tourism by Victorian regions

Region	GVA (\$million)	Rank	GRP (\$million)	Rank	Employed persons	Rank	Consumption (\$ million)	Rank
Daylesford and the Macedon Ranges	\$235	11	\$258	11	4,543	11	\$508	11
Geelong and the Bellarine	\$693	5	\$765	5	9,113	7	\$1,095	7
Gippsland	\$754	4	\$836	4	11,237	3	\$1,318	4
Goldfields	\$685	6	\$756	6	9,389	6	\$1,178	6
<b>Grampians</b>	<b>\$251</b>	<b>10</b>	<b>\$279</b>	<b>10</b>	<b>4,618</b>	<b>10</b>	<b>\$563</b>	<b>10</b>
Great Ocean Road	\$871	2	\$971	2	12,587	2	\$1,653	1
Mornington Peninsula	\$801	3	\$888	3	10,853	4	\$1,333	3
Murray	\$883	1	\$980	1	13,572	1	\$1,589	2
Phillip Island	\$341	9	\$379	9	4,799	9	\$640	9
Victoria's High Country	\$676	7	\$755	7	10,175	5	\$1,257	5
Yarra Valley and Dandenong Ranges	\$501	8	\$550	8	7,530	8	\$755	8
Regional Victoria	\$7,968		\$8,857		106,716		\$11,890	

TRA's tourism regions	GVA (\$million)	Rank	GRP (\$million)	Rank	Employed persons	Rank	Consumption (\$ million)	Rank
Central Highlands	\$93	17	\$104	17	1,779	16	\$219	16
Western Grampians	\$117	15	\$130	15	1,939	15	\$231	15
Wimmera	\$41	20	\$46	20	899	20	\$113	20

The region ranked 10<sup>th</sup> of all TEVE's regions in regional Victoria for the four main RTSA measures. Western Grampians ranked 15<sup>th</sup> amongst regional Victorian tourism regions. Central Highland ranked 16<sup>th</sup> or 17<sup>th</sup>, whilst Wimmera ranked 20<sup>th</sup>.

Note: Regions with smaller levels of tourism activity are subject to higher levels of variability from year to year. This is largely because Regional Tourism Satellite Accounts use economic modelling drawing on a range of data sources, some of which have small sample sizes and fluctuating results.

### Glossary

#### Tourism 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 GRP

The equivalent to Gross State Product (GSP) but at a regional level. Tourism GRP is tourism GVA plus net taxes on products that are attributable to the tourism industry. As such direct tourism GRP will generally have a higher value than direct tourism GVA.

Direct tourism GRP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, gross domestic (or regional) product.

#### Employed person

A person aged 15 years and over who worked for one hour or more per week for pay, profit, commission or payment in kind in a job or business, or on a farm; or worked for one hour or more without pay in a family business or on a farm.

#### Tourism consumption

Represents the demand side of tourism. Tourism consumption is the total value of goods and services consumed by domestic, inbound and outbound visitors. It consists of tourism expenditure plus imputed consumption on tourism related products.

Tourism consumption is measured as the price the visitor pays including all taxes, subsidies and sales margins (i.e. purchasers' prices).

#### Direct contribution of tourism

The contribution generated by transactions between the visitor and provider that involve 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.

#### Total contribution of tourism

The sum of direct and indirect contributions.

#### Basic prices

The amount received by the producer from the purchaser for goods or services. This excludes additional costs such as transport and taxes.

#### Purchasers' prices

The amount paid by the purchaser (excluding any deductible tax) to take delivery of goods or services. This includes costs such as transport and taxes.

### Further information

For further information on the regional TSA, please go to: <https://www.tra.gov.au/research/view-all-publications/all-publications/economic-reports/regional-tourism-satellite-accounts>