

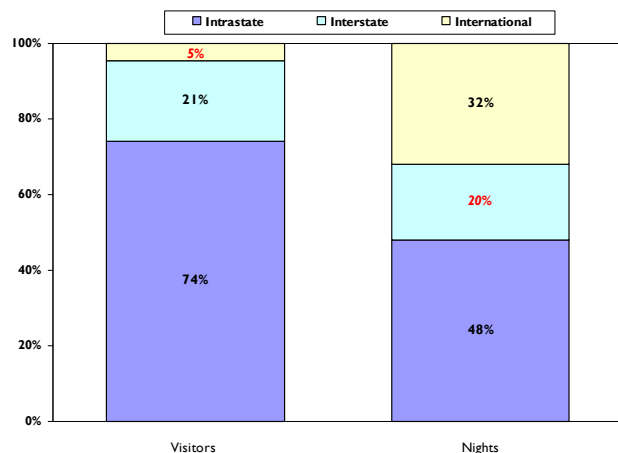
# Yarra Valley and Dandenong Ranges Market Profile Year Ending December 2010



This fact sheet provides a summary of the latest tourism data for the Yarra Valley and Dandenong Ranges campaign region. Information includes: domestic and international visitor numbers, daytrip visitor numbers, domestic and international visitor profiles including origin, purpose of visit, length of trip, visitor activities, travel party and accommodation used in the region.

## DOMESTIC & INTERNATIONAL OVERNIGHT VISITATION TO YARRA VALLEY AND DANDENONG RANGES

Seventy-four percent of overnight visitors to Yarra Valley and Dandenong Ranges were sourced from the intrastate market, followed by 21% from interstate and 5% from the international market.



Forty-eight percent of visitor nights in the Yarra Valley and Dandenong Ranges region were sourced from the intrastate market, followed by 32% from international and 20% from the interstate market.

Year ending December	2000	2009	2010	AAG*	% change
<b>Domestic</b>					
Overnight Visitors (000s)	566	594	502	-1.2% p.a.	-15.5%
Visitor Nights (000s)	1,380	1,455	1,190	-1.5% p.a.	-18.2%
Daytrip Visitors (000s)	2,968	2,361	3,197	+0.7% p.a.	+35.4%
<b>International</b>					
Overnight Visitors (000s)	15.2	27.5	25.0	+5.1% p.a.	-9.2%

\* Average Annual Growth

### Domestic Overnight Visitation

The Yarra Valley and Dandenong Ranges region received an estimated 502,000 domestic overnight visitors for the year ending December 2010. This was a decrease of 15.5% from 2009 to 2010. Five percent of all domestic overnight visitors to regional Victoria visited the Yarra Valley and Dandenong Ranges region.

The average annual decline since 2000 was 1.2% for domestic overnight visitation to the region compared to a decrease of 2.0% for regional Victoria generally.

### Domestic Visitor Nights

For the year ending December 2010 the region received an estimated 1.2 million domestic visitor nights, a decrease of 18.2% from 2009 to 2010. The region had a 4% market share of all domestic visitor nights to regional Victoria.

The average length of stay was 2.4 nights in 2010, unchanged from 2009.

The average annual decline since 2000 was 1.5% for domestic visitor nights to the region compared to a decrease of 1.2% for regional Victoria generally.

### Domestic Daytrip Visitation

There were an estimated 3.2 million domestic daytrip visitors to the Yarra Valley and Dandenong Ranges region in the year ending December 2010. This was an increase of 35.4% from 2009 to 2010. Thirteen percent of all domestic daytrips to/within regional Victoria visited the Yarra Valley and Dandenong Ranges region.

### International Overnight Visitation

The Yarra Valley and Dandenong Ranges region received an estimated 25,000 international overnight visitors for the year ending December 2010. This was a decline of 9.2% from 2009 to 2010. Eight percent of all international overnight visitors to regional Victoria visited the Yarra Valley and Dandenong Ranges region.

The average annual growth since 2000 was 5.1% for international overnight visitors to the region compared to 2.1% for regional Victoria generally.

### Estimated International Daytrip visitors

It is estimated that the Yarra Valley and Dandenong Ranges region received 285,600 international daytrip visitors in the year ending December 2010.

### Economic Importance of Tourism in the region (2007/08).

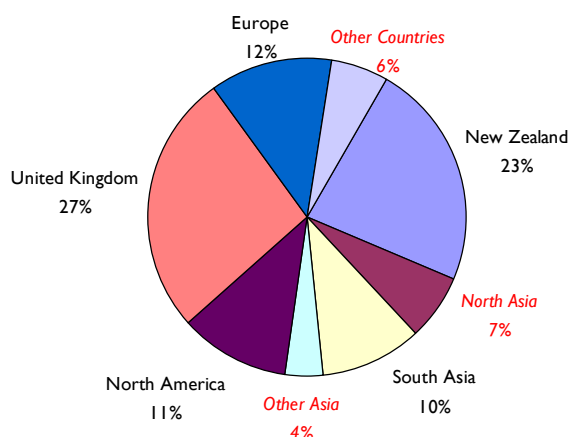
By estimating the ratio of the region's total tourism output to its total economic output, it is estimated tourism represents 1.3% of the economy in the Yarra Valley and Dandenong Ranges region.

# Yarra Valley and Dandenong Ranges Market Profile Year Ending December 2010



## PROFILE OF INTERNATIONAL OVERNIGHT VISITORS TO YARRA VALLEY AND DANDENONG RANGES

### Origin (% of international overnight visitors to Yarra Valley and Dandenong Ranges)\*



The largest source market of international overnight visitors to the Yarra Valley and Dandenong Ranges for the year ending December 2010 was the United Kingdom, accounting for 27% of international overnight visitors to the region. The next largest source market was New Zealand, accounting for 23%.

### Age Group (% of international overnight visitors to the Yarra Valley and Dandenong Ranges)\*

International overnight visitors to the Yarra Valley and Dandenong Ranges were most likely to be aged between 25-44 years (34%) or 45-64 years (35%).

Age Group	YVDR	Regional Vic
15 - 24 years	15%	16%
25 - 44 years	34%	36%
45 - 64 years	35%	36%
65+ years	15%	11%

### Purpose of Visit (% of international overnight visitors to the Yarra Valley and Dandenong Ranges)

Forty-three percent of international overnight visitors to the Yarra Valley and Dandenong Ranges were holiday visitors and 39% were visiting friends and relatives.

Purpose of Visit	YVDR	Regional Vic
Holiday or leisure	43%	53%
Visiting friends and relatives	39%	30%
Other	18%	17%

### Length of Visit (% of international overnight visitors to the Yarra Valley and Dandenong Ranges)

Thirty-five percent of international overnight visitors to the Yarra Valley and Dandenong Ranges were on a short visit of 1-3 nights.

Length of Visit	YVDR	Regional Vic
1-3 nights	35%	54%
4-7 nights	22%	20%
8-14 nights	20%	10%
15+ nights	23%	16%

### Travel Party (% of international overnight visitors to the Yarra Valley and Dandenong Ranges)\*

Fifty-four percent of international overnight visitors to the Yarra Valley and Dandenong Ranges were travelling on their own and another 30% travelled as part of an adult couple.

Travel Party	YVDR	Regional Vic
Travelling alone	54%	49%
Adult couple	30%	32%
Family (parents and children)	7%	7%
Other	9%	12%

### Top 10 Activities (% of international overnight visitors to the Yarra Valley and Dandenong Ranges)^

Compared to all international overnight visitors to regional Victoria, overnight visitors to the Yarra Valley and Dandenong Ranges were more likely to enjoy dining out (61% compared to 58%), to go shopping (41% compared to 27%), visit wineries (23% compared to 7%), visit wildlife parks, zoos or aquariums (16% compared to 8%), and go to markets (13% compared to 8%) on their trip.

Activity	YVDR	Regional Vic
Eat out	61%	58%
Sightseeing/looking around	50%	54%
Shopping for pleasure	41%	27%
Visit wineries	23%	7%
Pubs / clubs / discos etc	20%	21%
Visit national parks / state parks	18%	26%
Visit wildlife parks / zoos / aquariums	16%	8%
Go to markets	13%	8%
Go to the beach	13%	31%
Bushwalking / rainforest walks	13%	17%

\* Based on 2 years of data: January 2009 – December 2010.

^ Based on 3 years of data: January 2008 – December 2010.

# Yarra Valley and Dandenong Ranges Market Profile Year Ending December 2010

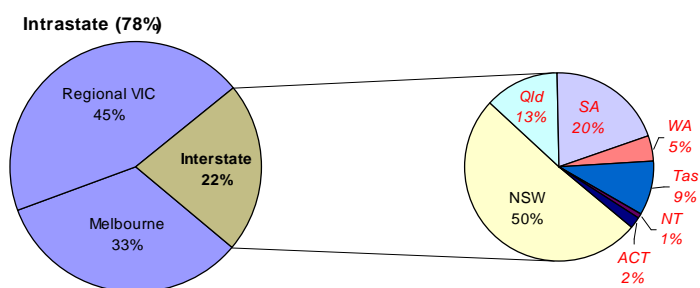


## PROFILE OF DOMESTIC OVERNIGHT VISITORS TO THE YARRA VALLEY AND DANDENONG RANGES

### Destination preference

Five percent of Australians and 10% of Victorians (aged 14 years +) indicated that they would like to take a leisure trip of one or more nights to the Yarra Valley and Dandenong Ranges region in the next two years.

### Origin of domestic overnight visitors to the Yarra Valley and Dandenong Ranges



Intrastate overnight visitors account for 78% of total domestic overnight visitors to the region. Interstate overnight visitors, accounting for 22% of total domestic overnight visitors, are primarily driven by the New South Wales market which comprises 50% of all interstate overnight visitors to the region.

### Age Group (% of domestic overnight visitors to the Yarra Valley and Dandenong Ranges)

Domestic overnight visitors to the Yarra Valley and Dandenong Ranges were most likely to be aged between 45-64 years (33%) and 25-44 years (32%).

Age Group	YVDR	Regional Vic
15 - 24 years	22%	14%
25 - 44 years	32%	35%
45 - 64 years	33%	35%
65+ years	13%	16%

### Purpose of Visit (% of domestic overnight visitors to the Yarra Valley and Dandenong Ranges)

Forty-six percent of domestic overnight visitors to the Yarra Valley and Dandenong Ranges were visiting friends and relatives and 34% were holiday visitors.

Purpose of Visit	YVDR	Regional Vic
Holiday or leisure	34%	55%
Visiting friends and relatives	46%	33%
Business	14%	9%
Other	6%	4%

### Lifecycle (% of domestic overnight visitors to the Yarra Valley and Dandenong Ranges)

Domestic overnight visitors to the Yarra Valley and Dandenong Ranges region tended to be in the parent (36%) lifecycle group. Compared to all domestic overnight visitors to regional Victoria, visitors to the region were more likely to be from the single lifecycle group (21% compared to 17%).

Lifecycle	YVDR	Regional Vic
Single, No Kids	21%	17%
Couple, No Kids	11%	11%
Parent	36%	37%
Older Working	13%	15%
Older Non-Working	18%	20%

### Length of Visit (% of domestic overnight visitors to the Yarra Valley and Dandenong Ranges)

Eighty-five percent of domestic overnight visitors to the Yarra Valley and Dandenong Ranges were on a short trip of 1-3 nights. A further 13% stayed 4-7 nights.

Length of Visit	YVDR	Regional Vic
1-3 nights	85%	76%
4-7 nights	13%	19%
8-14 nights	2%	4%
15+ nights	1%	1%

### Travel party (% of domestic overnight visitors to the Yarra Valley and Dandenong Ranges)

The majority of visitors to the Yarra Valley and Dandenong Ranges region travelled alone (30%) or as an adult couple (26%). When compared to visitors to regional Victoria, visitors to the Yarra Valley and Dandenong Ranges were also more likely to travel alone (30% compared to 19%) and less likely to travel as a family (22% compared to 27%).

Travel Party	YVDR	Regional Vic
Travelling alone	30%	19%
Adult couple	26%	29%
Family group - parents and children	22%	27%
Friends or relatives	17%	21%
Business associates	3%	2%
Other	3%	2%

# Yarra Valley and Dandenong Ranges

## Market Profile Year Ending December 2010



### Seasonality of Trip (% of domestic overnight visitors to the Yarra Valley and Dandenong Ranges)<sup>1</sup>

Domestic overnight visitation to the region peaks during Summer (29%) attracting the highest proportion of visitors. Visitation is relatively consistent throughout the year, with visitation being the lowest in Winter (22%).

Month	YVDR	Regional Vic
December	7%	8%
January	16%	15%
February	5%	7%
<b>Summer</b>	<b>29%</b>	<b>30%</b>
March	7%	10%
April	9%	11%
May	10%	6%
<b>Autumn</b>	<b>25%</b>	<b>26%</b>
June	7%	7%
July	9%	8%
August	6%	6%
<b>Winter</b>	<b>22%</b>	<b>21%</b>
September	7%	7%
October	8%	8%
November	10%	9%
<b>Spring</b>	<b>24%</b>	<b>24%</b>

### Accommodation (% of domestic visitor nights in the Yarra Valley and Dandenong Ranges)<sup>2</sup>

Of all domestic visitor nights in the Yarra Valley and Dandenong Ranges region for 2010, 46% were spent with friends or relatives.

Accommodation	YVDR	Regional Vic
Friends or relatives property	46%	37%
Caravan park / camping (Commerical or private)	18%	22%
Hotel, motel or serviced apartment	13%	16%
Other	7%	5%
Rented house, apartment, flat or unit	6%	11%
Guest house or B&B	6%	2%
Own property (e.g. holiday house)	3%	8%

### Top 10 Activities (% of domestic overnight visitors to the Yarra Valley and Dandenong Ranges)

Compared to all domestic overnight visitors to regional Victoria, overnight visitors to the Yarra Valley and Dandenong Ranges region were more likely to visit friends and relatives (54% compared to 45%), go bushwalking (15% compared to 13%) and go to wineries (10% compared to 5%) among other activities while on their trip.

Activity	YVDR	Regional Vic
Visit friends and relatives	54%	45%
Eat out at restaurants	40%	50%
General sight seeing	24%	30%
Go shopping (pleasure)	19%	24%
Bushwalking or rainforest walks	15%	13%
Pubs clubs discos etc	11%	18%
Visit national parks or State parks	10%	11%
Visit wineries	10%	5%
Other outdoor activities (e.g. horse riding, rock climbing, bungee jumping, four wheel driving or reef walking etc)	6%	3%
Visit museums or art galleries	6%	5%

### Roy Morgan Values Segments<sup>3</sup> (% of domestic overnight leisure visitors to the Yarra Valley and Dandenong Ranges)

Domestic overnight leisure visitors to Yarra Valley and Dandenong Ranges were more likely to come from the Visible Achievement (29%) and Socially Aware (22%) Values Segments.

Values Segments	YVDR	Regional Vic
Basic Needs	1%	1%
Fairer Deal	0%	2%
Traditional Family Life	14%	20%
Conventional Family Life	8%	10%
'Look At Me'	7%	9%
Something Better	7%	5%
Real Conservatism	3%	4%
Young Optimism	9%	6%
Visible Achievement	29%	22%
Socially Aware	22%	22%

<sup>1</sup> Based on 2 years of data: January 2009 – December 2010.

<sup>2</sup> Based on 3 years of data: January 2008 – December 2010.

<sup>3</sup> Developed in conjunction with Colin Benjamin of the Horizons Network

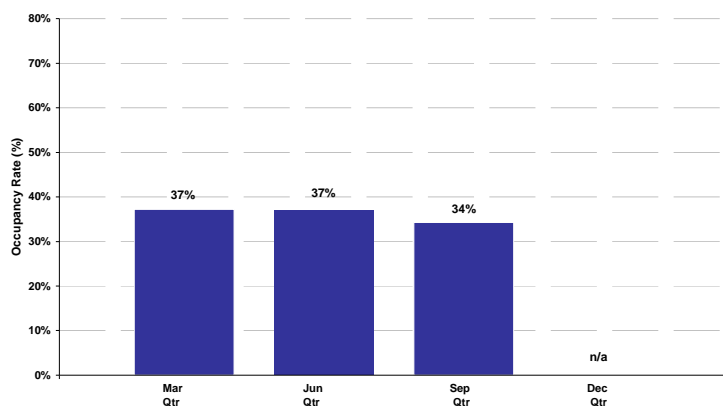
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## Tourist Accommodation - supply and demand in Yarra Valley and Dandenong Ranges

- Based on the ABS Survey of Tourism Accommodation:
- There were 22 hotels/motels/serviced apartments with 15 or more rooms in the region as at the December quarter 2010.

	At December Quarter 2010		Year Ending December 2010		
	Establishments	Rooms/Sites Available	Room Nights Occupied ('000)	Average Occupancy Rate	Takings (\$'000)
Hotels/Motels/Serviced Apartments 15+ rooms	22	n/a	n/a	n/a	n/a



Note: N/A refers to results in 2010 that were not reported by the ABS, primarily due to maintaining data confidentiality for the accommodation suppliers in the region.

In 2010, changes were made to the ABS Survey of Tourist Accommodation to only collect and publish the core scope of 15 or more rooms establishments in the survey.

It's important to be aware that the Yarra Valley and Dandenong Ranges region also offers a number of smaller accommodation properties with less than 15 rooms including Bed and Breakfast properties, cottages and farmstays. These accommodation establishments are not included in the scope of the ABS Survey of Tourist Accommodation results outlined above.

For more information on tourist accommodation in Victoria please refer to the Australian Bureau of Statistics website: <http://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/7F1BCA4FD889E82CCA25775700164667?opendocument>

For more information and statistics on tourism in Victoria and Australia please refer to the:

1. Tourism Victoria website:

<http://www.tourism.vic.gov.au/facts-and-figures/>

2. Dept of Resources, Energy and Tourism website:

[http://www.ret.gov.au/tourism/tourism\\_statistics/Pages/TourismStatistics.aspx](http://www.ret.gov.au/tourism/tourism_statistics/Pages/TourismStatistics.aspx)

3. Tourism Research Australia website:

<http://www.ret.gov.au/tourism/tra/Pages/default.aspx>

4. Destination Visitor Survey results:

<http://www.ret.gov.au/tourism/tra/regional/destinations/Pages/default.aspx>

Note 1: Percentages may not add to 100% due to rounding.

Note 2: Figures in *red italics* are subject to sampling error and should be used with caution.

Sources:

- *National and International Visitor Surveys*, year ending December 2000-2010, Tourism Research Australia, Canberra
- *The Economic Importance of Tourism in Australia's Regions*, Tourism Research Australia, Canberra
- *Holiday Tracking Survey*, year ending December 2010, Roy Morgan Research
- *Survey of Tourist Accommodation*, December 2010, Australian Bureau of Statistics.