

# Forecast Visitation to Victoria

## 2011 – Issue 2 Forecasts

### International Visitor Forecasts 2010 (actual) to 2020 (forecast)

Visitors (000s)	Actual	Forecast										AAG
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	10/20
<b>Tier 1 Markets</b>												
China	206	247	283	317	343	363	380	395	409	422	435	7.8% p.a.
New Zealand	246	255	261	267	272	277	282	287	292	296	301	2.0% p.a.
United Kingdom	197	186	183	186	193	199	205	211	217	223	229	1.5% p.a.
United States	126	121	119	122	128	133	139	145	150	157	163	2.6% p.a.
<b>Tier 2 Markets</b>												
Japan	38	31	31	32	33	33	34	34	34	35	35	-0.8% p.a.
Singapore	78	82	84	86	88	90	92	95	96	98	100	2.5% p.a.
Malaysia	91	97	101	105	108	111	114	116	119	122	125	3.2% p.a.
Germany	59	58	57	58	61	63	65	67	69	71	73	2.2% p.a.
Korea	31	29	29	30	31	32	33	34	36	37	38	1.9% p.a.
India	58	63	68	74	80	86	93	101	109	117	126	8.0% p.a.
Hong Kong	50	53	55	57	58	60	61	62	64	65	67	3.0% p.a.
Canada	36	34	33	34	36	38	40	42	44	46	47	2.9% p.a.
<b>Tier 3 Markets</b>												
France	32	30	29	30	32	34	35	37	39	41	42	2.9% p.a.
Italy	25	24	24	24	25	26	27	28	29	30	31	2.2% p.a.
Netherlands	21	20	19	20	20	21	22	23	24	24	25	1.9% p.a.
Switzerland	16	15	15	15	16	17	17	18	18	19	19	2.2% p.a.
Scandinavia	30	29	29	29	31	32	33	34	35	36	38	2.4% p.a.
Indonesia	38	45	50	54	57	61	64	68	71	75	79	7.5% p.a.
Taiwan	26	24	23	24	25	26	28	29	30	31	32	2.3% p.a.
Thailand	29	31	33	35	37	38	40	41	42	44	45	4.4% p.a.
<b>TOTAL</b>	<b>1,649</b>	<b>1,655</b>	<b>1,700</b>	<b>1,768</b>	<b>1,846</b>	<b>1,919</b>	<b>1,989</b>	<b>2,058</b>	<b>2,126</b>	<b>2,195</b>	<b>2,265</b>	<b>3.2% p.a.</b>

\* AAG denotes Average Annual Growth

\* Based on visitors aged 15 years and over

\* Note: Victorian visitor estimates are based on national forecast growth rates and assume a constant market share of visitors (International Visitor Survey, year ending December 2010)

Slight variations in calculations are due to rounding.

Sources: Tourism Forecasting Committee Forecast 2011 Issue 2; International Visitor Survey, Tourism Research Australia, year ending December 2010.

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### International Visitor Nights Forecasts 2010 (actual) to 2020 (forecast)

Visitor Nights ('000)	Actual	Forecast										AAG
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	10/20
<b>Tier 1 Markets</b>												
China	7,754	8,821	9,804	10,543	11,087	11,550	11,989	12,408	12,806	13,186	13,557	5.7% p.a.
New Zealand	2,220	2,364	2,435	2,490	2,540	2,588	2,638	2,684	2,731	2,770	2,807	2.4% p.a.
United Kingdom	3,738	3,440	3,379	3,394	3,461	3,517	3,567	3,606	3,645	3,684	3,722	0.0% p.a.
United States	1,630	1,638	1,616	1,635	1,687	1,733	1,780	1,825	1,870	1,914	1,958	1.8% p.a.
<b>Tier 2 Markets</b>												
Japan	931	797	759	771	778	772	761	749	737	724	710	-2.7% p.a.
Singapore	1,798	1,856	1,909	1,963	2,013	2,065	2,116	2,168	2,221	2,273	2,328	2.6% p.a.
Malaysia	2,661	2,729	2,870	3,099	3,339	3,593	3,863	4,144	4,446	4,768	5,110	6.7% p.a.
Germany	962	925	917	930	961	993	1,024	1,055	1,086	1,116	1,145	1.8% p.a.
Korea	1,245	1,190	1,155	1,164	1,194	1,224	1,251	1,275	1,299	1,319	1,338	0.7% p.a.
India	3,277	3,790	4,069	4,319	4,582	4,842	5,112	5,393	5,684	5,985	6,304	6.8% p.a.
Hong Kong	928	977	1,024	1,067	1,096	1,119	1,142	1,165	1,187	1,208	1,230	2.9% p.a.
Canada	740	703	713	750	803	858	915	975	1,037	1,100	1,165	4.6% p.a.
<b>Tier 3 Markets</b>												
France	797	743	712	714	728	741	751	758	765	770	774	-0.3% p.a.
Italy	555	543	532	539	557	575	590	605	619	632	644	1.5% p.a.
Netherlands	298	275	269	270	276	283	288	293	297	301	305	0.2% p.a.
Switzerland	181	180	181	188	200	212	224	236	248	261	275	4.3% p.a.
Scandinavia	591	583	580	584	603	622	641	658	675	692	707	1.8% p.a.
Indonesia	1,476	1,648	1,789	1,926	2,057	2,184	2,308	2,436	2,565	2,693	2,827	6.7% p.a.
Taiwan	531	515	494	485	489	492	493	492	491	489	486	-0.9% p.a.
Thailand	1,238	1,293	1,348	1,392	1,422	1,444	1,463	1,479	1,493	1,505	1,516	2.0% p.a.
<b>TOTAL</b>	<b>40,662</b>	<b>41,109</b>	<b>42,239</b>	<b>44,062</b>	<b>46,166</b>	<b>48,271</b>	<b>50,325</b>	<b>52,322</b>	<b>54,350</b>	<b>56,397</b>	<b>58,480</b>	<b>3.7% p.a.</b>

\* AAG denotes Average Annual Growth

\* Based on visitors aged 15 years and over

Slight variations in calculations are due to rounding.

Sources: Tourism Forecasting Committee Forecast 2011 Issue 2; International Visitor Survey, Tourism Research Australia, year ending December 2010.

# Forecast Visitation to Victoria

## 2011 – Issue 2 Forecasts

### International Visitor Nights Forecast 2010 (actual) to 2020 (forecast) by purpose and metro/regional

Visitor Nights (000s)	Actual	Forecast										AAG
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	10/20
<b>Melbourne</b>												
Business	2,475	2,662	2,798	2,897	2,980	3,056	3,128	3,199	3,268	3,335	3,401	3.2% p.a.
Holiday	6,353	6,633	6,844	7,060	7,275	7,476	7,672	7,862	8,053	8,226	8,398	2.8% p.a.
VFR	9,331	9,975	10,311	10,644	10,990	11,304	11,608	11,910	12,209	12,500	12,788	3.2% p.a.
Other	17,512	17,102	17,514	18,560	19,813	21,123	22,416	23,682	24,991	26,339	27,732	4.7% p.a.
<b>Total Melbourne</b>	<b>35,671</b>	<b>36,371</b>	<b>37,466</b>	<b>39,161</b>	<b>41,058</b>	<b>42,959</b>	<b>44,823</b>	<b>46,654</b>	<b>48,521</b>	<b>50,401</b>	<b>52,318</b>	<b>3.9% p.a.</b>
<b>Regional Victoria</b>												
Business	<i>196</i>	<i>236</i>	<i>248</i>	<i>257</i>	<i>262</i>	<i>267</i>	<i>273</i>	<i>277</i>	<i>281</i>	<i>286</i>	<i>290</i>	<i>4.0% p.a.</i>
Holiday	1,845	1,615	1,622	1,684	1,772	1,853	1,922	1,979	2,033	2,088	2,139	1.5% p.a.
VFR	2,035	1,754	1,755	1,788	1,841	1,897	1,949	1,996	2,042	2,090	2,138	0.5% p.a.
Other	916	1,132	1,147	1,173	1,232	1,295	1,358	1,415	1,472	1,533	1,594	5.7% p.a.
<b>Total regional Victoria</b>	<b>4,991</b>	<b>4,737</b>	<b>4,773</b>	<b>4,902</b>	<b>5,108</b>	<b>5,312</b>	<b>5,501</b>	<b>5,667</b>	<b>5,829</b>	<b>5,997</b>	<b>6,162</b>	<b>2.1% p.a.</b>
<b>TOTAL VICTORIA</b>	<b>40,662</b>	<b>41,109</b>	<b>42,239</b>	<b>44,062</b>	<b>46,166</b>	<b>48,271</b>	<b>50,325</b>	<b>52,322</b>	<b>54,350</b>	<b>56,397</b>	<b>58,480</b>	<b>3.7% p.a.</b>

\* AAG denotes Average Annual Growth

\* Based on visitors aged 15 years and over

Slight variations in calculations are due to rounding.

Note that figures in red italics are below reliable threshold and should be interpreted with caution.

Sources: Tourism Forecasting Committee Forecast 2011 Issue 2; International Visitor Survey, Tourism Research Australia, year ending December 2010.

# Forecast Visitation to Victoria

## 2011 – Issue 2 Forecasts

### Domestic Visitor Forecasts 2010 (actual) to 2020 (forecast)

Visitors (million)	Actual	Forecast										AAG*
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	10/20
Business	2.6	2.7	2.7	2.7	2.7	2.7	2.7	2.8	2.8	2.8	2.8	
Holiday	7.4	7.5	7.6	7.6	7.7	7.7	7.7	7.8	7.8	7.8	7.8	
VFR	5.2	5.3	5.4	5.4	5.4	5.4	5.5	5.5	5.5	5.5	5.5	
Other	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	
<b>TOTAL#</b>	<b>15.8</b>	<b>16.0</b>	<b>16.2</b>	<b>16.3</b>	<b>16.3</b>	<b>16.4</b>	<b>16.5</b>	<b>16.5</b>	<b>16.6</b>	<b>16.6</b>	<b>16.7</b>	<b>0.5% p.a.</b>

### Domestic Visitor Nights Forecast 2010 (actual) to 2020 (forecast) by purpose and Metro Regional

Visitor Nights (million)	Actual	Forecast										AAG*
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	10/20
<b>METRO</b>												
Business	4.2	4.5	4.6	4.6	4.7	4.7	4.7	4.8	4.8	4.8	4.8	1.5% p.a.
Holiday	6.1	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	0.5% p.a.
VFR	6.6	6.1	6.1	6.1	6.2	6.2	6.2	6.2	6.2	6.3	6.3	-0.4% p.a.
Other	1.4	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	-0.3% p.a.
<b>Total Metro</b>	<b>18.2</b>	<b>18.2</b>	<b>18.4</b>	<b>18.4</b>	<b>18.5</b>	<b>18.6</b>	<b>18.6</b>	<b>18.7</b>	<b>18.8</b>	<b>18.8</b>	<b>18.9</b>	<b>0.4% p.a.</b>
<b>REGIONAL</b>												
Business	2.6	2.2	2.2	2.2	2.2	2.2	2.2	2.3	2.3	2.3	2.3	-1.3% p.a.
Holiday	18.7	19.0	19.0	19.0	19.0	19.1	19.1	19.1	19.1	19.1	19.1	0.2% p.a.
VFR	8.8	9.0	9.0	9.1	9.1	9.1	9.1	9.1	9.2	9.2	9.2	0.5% p.a.
Other	1.1	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	2.6% p.a.
<b>Total Regional</b>	<b>31.2</b>	<b>31.6</b>	<b>31.7</b>	<b>31.8</b>	<b>31.8</b>	<b>31.9</b>	<b>31.9</b>	<b>31.9</b>	<b>32.0</b>	<b>32.0</b>	<b>32.0</b>	<b>0.3% p.a.</b>
<b>TOTAL</b>	<b>49.4</b>	<b>49.9</b>	<b>50.1</b>	<b>50.2</b>	<b>50.3</b>	<b>50.5</b>	<b>50.6</b>	<b>50.7</b>	<b>50.7</b>	<b>50.8</b>	<b>50.9</b>	<b>0.3% p.a.</b>

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\* Based on visitors aged 15 years and over

#Note: Victorian visitor estimates are based on national forecast growth rates and assume a constant market share of visitors (National Visitor Survey, year ending December 2010)

Slight variations in calculations are due to rounding.

Sources: *Tourism Forecasting Committee Forecast 2011 Issue 2; National Visitor Survey*, Tourism Research Australia, year ending December 2010.

Fact sheet produced by Tourism Victoria Research Unit, October 2011. For the full report refer to <http://www.ret.gov.au/tourism/tra/traforecasts/publications/Pages/default.aspx>