

Calero, Claude

From: Marshall, Justin
 Sent: Wednesday, 5 October 2011 10:45 AM
 To: Quinn, Tim; [redacted]@kpmg.com.au'; [redacted]@ttf.org'; 'felicia.mariani@atec.net.au'; [redacted]@qtic.com.au'; Madden, Jane; [redacted]@westernaustralia.com'; [redacted]@tourism.australia.com'; [redacted]@anz.com'; [redacted]@Treasury.gov.au'; 'gary.oriordan@atec.net.au'; Anderson, Nell; 'tony.webber'; 'Adele Labine-Romain'
 Cc: Bailey, Geoff; Calero, Claude; Pang, Ben; Pham, Tien
 Subject: Pre-Embargo Copy of Forecast 2011 Issue 2 Publication [SEC=IN-CONFIDENCE:RET]
 Attachments: Forecast 2011 Issue 2.pdf; TFC Forecasts 2011#2 (excel 2003 version) delink.xls

Redaction pursuant to s. 47F

Tracking: Recipient Read

Recipient	Read
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Pham, Tien	Deleted: 25/10/2011 1:59 PM

Redactions pursuant to s. 47F

Dear TFC Members,

Please find attached a pre-embargo copy of the *Forecast 2011 Issue 2* publication and an excel version of the forecast tables which will be released at **10.00am tomorrow (6 October 2011)**.

Note as a result of the time required to apply the revisions to the national forecasts and get the forecast publication ready there has been insufficient time to finalise the regional forecasts for concurrent release on 6 October 2011.

It is expected that these forecasts will be ready for release within two weeks. I will advise you of a firm release date for the regional forecasts as soon as possible. A copy of the regional forecasts will be provided to you for endorsement when they are finalised.

Thank you for your part in bringing this issue of the TFC forecast publication together it has been much appreciated. I look forward to working with you all on the next round of forecasts scheduled for release in March / April 2012.

If you have any questions or would like to discuss the forecasts please feel free to phone or

email me.

Regards Justin

Justin Marshall

Manager, Forecast & Modelling

Tourism Research Australia

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From: Quinn, Tim

Sent: Thursday, 29 September 2011 4:07 PM Redactions below pursuant to s. 47F

To: @kpmg.com.au'; 'h...@ttf.org'; 'felicia.mariani@atec.net.au'; @qtic.com.au';
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i@anz.com'; '@Treasury.gov.au'; 'gary.oriordan@atec.net.au'; Anderson, Nell

Cc: Marshall, Justin; Bailey, Geoff; Calero, Claude; Pang, Ben; Pham, Tien

Subject: Tourism Forecasting Committee Forecasts Issue#2: endorsement sought [SEC=IN-CONFIDENCE]

Dear TFC members

Please find attached a final draft of the TFC *Forecast 2011 Issue 2* publication for your review and endorsement.

Please note that while the forecasts have been finalised, consistent with requested amendments, a final edit is currently being undertaken. The revisions made have resulted in the following headline numbers:

- Inbound arrivals growth has been downgraded for 2012 (from 4.1% to 2.7%) and 2013 (from 4.6% to 4.0%). To achieve these revisions European and North American markets are now expected to record moderate falls in 2012 (1% to 2% range) and only modest growth in 2013. Smaller downward revisions have also been applied to other markets including Japan, Taiwan, South Korea and the Middle East. To ensure consistency between inbound forecast series the revisions to inbounds arrival have also been reflected in the inbound nights and TIEV forecasts. The forecast commentary has also been updated to reflect the changes requested.

- The decline in domestic visitor nights for 2011 has been reduced. The fall is now forecast to be 0.3% (in line with previous expectations) rather than the 0.9% presented in the TFC pack. The rebound in growth for 2012 has been moderated slightly (from 0.7% to 0.5%). Again to ensure consistency between domestic series the revisions to domestic visitor nights have been reflected in the trip and TDEV forecasts and commentary has been updated as required.

If you have any comments on the final draft of the publication it would be appreciated if these could be provided to me by email by 10:30am Tuesday 4 October. TRA is also in the process of finalising the regional forecasts. The intention is to release these separately but on the same day as the Forecast publication (on the 6 October). Once these are finalised a copy will be forwarded to you.

Thank you for your commitment in bringing this issue of the TFC forecast publication together. TRA looks forward to any further feedback you might provide and to working with you all on the next round of forecasts scheduled for release in March /April 2012.

Regards/Tim

Tim Quinn

A/g General Manager

Tourism Research Australia

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