

## DEPARTMENT OF RESOURCES, ENERGY AND TOURISM -

**Minister for Information**  
cc Minister Assisting the Minister for Tourism

Min ID: B11/1996

**TOURISM FORECASTING COMMITTEE (TFC) REGIONAL FORECASTS**

**Purpose:** To inform you of the release of the TFC Regional Forecasts 2011 Issue 2 on 3 November 2011.

**Background:** The TFC regional forecasts complement the national forecasts (which were released on 6 October 2011). Typically, they are released concurrently to the national forecasts. However, the workload involved in preparing the national forecasts for release prior to the National Tourism Directions Conference meant this was not possible for this round.

**Issues:** At a national level, due to the impacts of floods and cyclones earlier in the year, higher consumer prices, and a fall in consumer sentiment and business confidence in recent months, domestic visitor nights are forecast to fall by 0.3 per cent to 259 million in 2011. Across the states and territories, the short term outlook is brightest for SA (5.5 per cent), NSW (2.6 per cent) and WA (2.1 per cent) where solid growth is expected in 2011. In contrast, falls in visitor nights are expected for the ACT (-15.2 per cent), NT (-9.2 per cent), Tasmania (-5.6 per cent), and Queensland (-4.1 per cent, refer **Attachment A, Table 1**). For Queensland, a stronger and more rapid turnaround than expected from recent natural events has led to a moderation in the decline in visitor nights than previously forecast for 2011 (now 4.1 per cent rather than 7.5 per cent). However, for the other states where visitor nights are expected to fall, a weak first half to 2011 has led to the forecasts downgraded from earlier in the year.

Inbound visitor nights to Australia are forecast to increase by 0.6 per cent to reach 188 million in 2011 – a downward revision on previously forecast (1.7 per cent) attributable primarily to the slower pace of economic growth in the United States and Europe and associated global economic uncertainty. Reflecting this, forecasts for 2011 for most states and territories have been revised downward with strongest growth expected for NSW (2.7 per cent) and the ACT (8.8 per cent). Declines are still expected for SA (-8.6 per cent), Tasmania (-5.2 per cent) and the NT (-10.2 per cent). The fall in visitor nights to Queensland (-0.6 per cent) is expected to be modest despite Japan, a key inbound market and impacted by the March 2011 earthquake, which is down 18.2 per cent for the year to August 2011 (see **Attachment A, Table 2**).

As part of the regional work, forecasts of domestic and international visitor nights are aggregated to provide an overall picture of travel activity. At the national level this indicates visitor nights will be flat in 2011 (see **Attachment A, Table 3**). In terms of purpose of travel, total visitor nights will be strongest for business and weakest for holiday. The short term outlook is expected to be similar for total night in metropolitan centres (0.3 per cent growth) and regional Australia (0.2 per cent decline) (see **Attachment A, Figure 1**).

**Communication:** The TFC and State Tourism Offices (STOs) will receive a pre-embargo copy of the regional forecast tables (**Attachment B**) on 26 October 2011. The forecasts will be released via the TRA website on 3 November 2011.

***Slipstream version – 26 October 2011***

Tim Quinn (+61 2 6213 6745)  
A/g General Manager  
Tourism Research Australia  
25 October 2011

Consultation: Tourism Forecasting  
Committee, STOs

NOTED/PLEASE DISCUSS



REGIONAL FORECASTS SUMMARY MATERIAL

ATTACHMENT A

**Table 1: Domestic visitor night forecasts summary, 2010 to 2013**

	2010	2011		2012		2013	
	'000	'000	% grth	'000	% grth	'000	% grth
NSW	78,330	80,393	2.6	80,625	0.3	80,834	0.3
Vic	49,406	49,894	1.0	50,065	0.3	50,213	0.3
Qld	71,208	68,305	-4.1	68,951	0.9	69,573	0.9
SA	16,989	17,923	5.5	17,981	0.3	18,033	0.3
WA	23,597	24,102	2.1	24,188	0.4	24,263	0.3
Tas	8,148	7,692	-5.6	7,760	0.9	7,818	0.8
NT	6,273	5,694	-9.2	5,758	1.1	5,814	1.0
ACT	5,574	4,727	-15.2	4,786	1.3	4,837	1.1
<b>Aust</b>	<b>259,525</b>	<b>258,730</b>	<b>-0.3</b>	<b>260,113</b>	<b>0.5</b>	<b>261,386</b>	<b>0.5</b>

**Table 2: International visitor night forecasts summary, 2010 to 2013**

	2010	2011		2012		2013	
	'000	'000	% grth	'000	% grth	'000	% grth
NSW	65,225	67,003	2.7	68,527	2.3	70,535	2.9
Vic	40,662	41,109	1.1	42,239	2.8	44,062	4.3
Qld	39,800	39,551	-0.6	40,765	3.1	42,599	4.5
SA	8,820	8,061	-8.6	8,278	2.7	8,576	3.6
WA	22,031	22,219	0.9	22,864	2.9	23,738	3.8
Tas	2,980	2,825	-5.2	2,909	3.0	3,013	3.6
NT	3,962	3,560	-10.2	3,640	2.3	3,779	3.8
ACT	3,230	3,514	8.8	3,571	1.6	3,655	2.4
<b>Aust</b>	<b>186,710</b>	<b>187,841</b>	<b>0.6</b>	<b>192,794</b>	<b>2.6</b>	<b>199,959</b>	<b>3.7</b>

**Table 3: Total visitor night forecasts summary, 2010 to 2013**

	2010	2011		2012		2013	
	'000	'000	% grth	'000	% grth	'000	% grth
NSW	143,555	147,395	2.7	149,152	1.2	151,369	1.5
Vic	90,068	91,003	1.0	92,304	1.4	94,276	2.1
Qld	111,008	107,856	-2.8	109,716	1.7	112,172	2.2
SA	25,809	25,984	0.7	26,259	1.1	26,609	1.3
WA	45,628	46,321	1.5	47,052	1.6	48,002	2.0
Tas	11,128	10,517	-5.5	10,668	1.4	10,831	1.5
NT	10,235	9,254	-9.6	9,398	1.6	9,593	2.1
ACT	8,804	8,241	-6.4	8,357	1.4	8,492	1.6
<b>Aust</b>	<b>446,235</b>	<b>446,570</b>	<b>0.1</b>	<b>452,908</b>	<b>1.4</b>	<b>461,344</b>	<b>1.9</b>

Figure 1: Forecast growth in visitor nights and domestic share of nights, 2011

