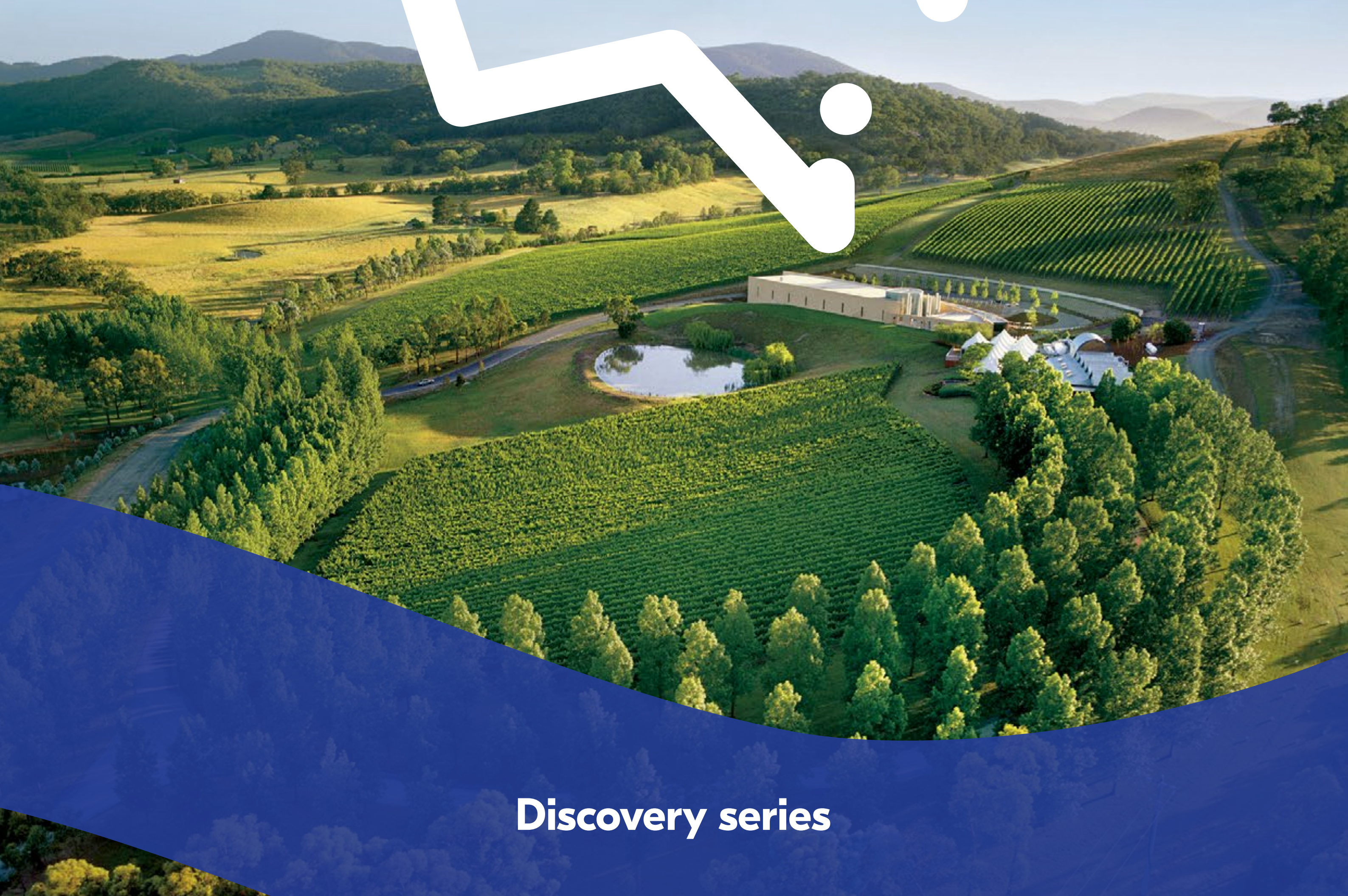
Are we there yet?

The current and future value of tourism to **Victoria**



Discovery series

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About the NRMA

Better road and transport infrastructure has been a core focus of the NRMA since 1920 when our founders lobbied for improvements to the condition of Parramatta Road in Sydney. Independent advocacy was the foundation activity of the organisation and remains critical to who we are as we approach our first centenary.

From humble beginnings, the NRMA has grown to one of the largest tourism and travel companies in Australia, representing over 2.6 million Australians. As our business has grown and diversified, so too has our national footprint and customer base, providing motoring, mobility and tourism services to 4.9 million customers across the country.

Today, the NRMA works with policy makers and industry leaders to advocate for increased investment in transport solutions to make mobility safer and easier, provide access to affordable travel options and experiences, and ensure communities remain connected to business and employment opportunities. The NRMA is passionate about facilitating tourism and travel across Australia, recognising the vital role travel plays in how Australians connect and recharge, and discover the country.

By working together with all levels of government to deliver integrated tourism and travel options we can give the community a real choice about how they get around and explore the country. The NRMA believes that integrated transport networks, high-quality public transport and improved visitor facilities are essential to solve the challenge of growing congestion and provide for the future growth of our communities.

Discovery series

The NRMA is passionate about travel. We aim to inspire people to connect, explore and discover this great country through quality tourism and transport services.

As the backbone of many regional communities and an employer of over half a million Australians, we need to ensure the tourism industry continues to grow. The NRMA will champion investment in transport and visitor infrastructure, partnerships to profile our regions and technology to link visitors with the most iconic and best kept secrets this country has to offer.

Introduction

Visitors love every piece of Victoria. Outside the bustling laneways of Melbourne, Victoria's regions boast amazing natural assets that lure visitors outside the gateway. From the Great Ocean Road to the Yarra Valley to Philip Island, the state has coupled its natural environment with great events to encourage visitors to explore and engage.

Victoria welcomed 74.9 million visitors in 2016-17, spending $25.2 billion in local communities. Expenditure by international visitors grew more than 2.5 times faster than domestic overnight visitors at 16 per cent per year to $7.5 billion.

Yet expenditure by domestic visitors still represents 70 per cent of total expenditure in the state at $17.7 billion. Ninety four per cent of expenditure in regional Victoria is generated by domestic visitors at $8.4 billion.

However, only 36 per cent of total visitor expenditure occurs in regional Victoria. This highlights the importance of fostering Australia's love affair with the great outdoors and encouraging visitors into the regions.

The NRMA is committed to the tourism industry and the communities it supports. The NRMA's VIC *Are We There Yet?* paper highlights the importance of tourism to Victoria and its regions, trends in visitation and expenditure, and the value of drive tourism and caravan and camping to many of the state's iconic regional destinations.

In 2016-17 the Great Ocean Road recorded the highest rate of visitor expenditure outside Melbourne at $1.3 billion. Spa Country recorded the largest average annual increase in total visitor expenditure at 12 per cent to $230 million.

The Central Highlands, Goulburn, Great Ocean Road, Philip Island and Spa Country, all experienced average annual increases in international visitation above 15 per cent between 2011-12 and 2016-17. Goulburn experienced the largest average annual increase in international expenditure at 27 per cent to $45 million in 2016-17.

Both Macedon and the Upper Yarra experienced the largest average annual growth in domestic overnight expenditure, rising to $102 million and $67 million respectively.

Encouraging visitors to discover our regions and stay longer is a core focus of the NRMA. In 2016-17, 63.1 million visitors took a self-drive trip, with 98 per cent of self-drive trips in Victoria being undertaken by domestic visitors. Further, caravan and camping generated $819 million in visitor expenditure, of which 94 per cent occurred in regional Victoria.

The Peninsula and Great Ocean Road experienced the largest number of self-drive visitors outside Melbourne, yet Phillip Island experienced the largest average annual increase in international visitors of 22 per cent per annum to 48,000.

With the right level of investment, planning and industry partnerships, the NRMA forecasts that visitor nights could grow to 206 million by 2026-27, contributing $31.5 billion in overnight visitor expenditure to the state economy. Of this expenditure, $7.9 billion could be directly contributed to regional communities.

Victoria is the first state to look beyond its 2020 tourism targets to provide a stretch target to 2025, and should be commended for this effort. A similar process should be adopted in the other states and at a national level to guide the sectors performance in the regions to 2020 and beyond.

With the industry approaching the cusp of the 2020 Tourism Industry potential target, now is the time to review the state's performance and plan for the future.

VIC tourism regions

Tourism summary

Headline figures

143,800 people employed in the sector

48.4 million visitors to **regional VIC –** 65 per cent of total visitation

$25.2 billion in visitor expenditure

Domestic overnight expenditure totalled **$12.9 billion** representing 51 per cent of total spend

International visitor expenditure totalled $7.5 billion in 2016-17 – an average annual growth rate of 16 per cent. International expenditure grew more than 2.5 times faster than domestic overnight spend

$9 billion spent in the regions - 36% of total spend

74.9 million visitors – 96 per cent are domestic

Industry potential

Visitor nights could grow to 206 million by 2026-27 – 65 million in regional VIC

$7.9 billion in overnight visitor expenditure could be spent directly in regional Victoria

Direct overnight visitor expenditure could increase to $31.5 billion in 2026-27

Self-drive visitor nights could increase to **111** million by 2026-27

Caravan and camping

Visitors who stayed in a caravan or camping ground spent **$819 million in 2016-17**

94% of caravan and camping expenditure occurs in regional VIC

381,000 caravan and camping visitors to the Great Ocean Road – an average annual growth rate of 8 per cent

In the regions

The Peninsula received **6.1 million** visitors in 2016-17, the largest number of total visitors outside Melbourne

Great Ocean Road - largest number of international visitors outside Melbourne 220,000

Domestic overnight visitors spent $870 million along the Great Ocean Road, a 5 per cent average annual increase, and the largest contribution outside Melbourne

Spa Country recorded the largest average annual increase in total visitor expenditure at 12 per cent to **$230 million**

Western Grampians has seen the largest average annual increase in domestic nights of 11 per cent **806,000**

Goulburn saw the largest average annual increase in international expenditure at 27 per cent to $45 million in 2016-17

Macedon and the Upper Yarra experienced the largest average annual growth in domestic overnight expenditure, rising to $102 million and $67 million respectively

Caravan and camping

West Grampians, Spa Country, Great Ocean Road and Gippsland experienced the largest increases in caravan and camping visitation between 2011-12 and 2016-17

Self-drive

63.1 million visitors took a self-drive trip in 2016-17

98% of self-drive trips were by domestic visitors.

Self-drive trips by international visitors have grown on average 12 per cent each year compared to 6 per cent for domestic overnight visitors

Self-drive tourism expenditure totalled **$13.5 billion in 2016-17**

59 per cent of self-drive tourism expenditure occurs in regional VIC

Spa Country and Western Grampians have seen the largest average annual growth in self-drive regional expenditure at 12 per cent to $218 million and $161 million respectively

Gippsland experienced the largest average annual growth in regional visitor nights by self-drive visitors at 11 per cent to 3.4 million

Phillip Island experienced the largest average annual increase in international self-drive visitors of **22 per cent to 48,000**

Economic contribution of tourism

	Total tourism visitation					Total tourism nights		
		Visitors (000)				Nights (000)		
Stopover region	Financial year	Int'l	Dom. overnight	Dom. daytrips	Total	Int'l	Dom. overnight	Total
Melbourne	2011/12	1,639	6,854	15,451	23,945	38,281	19,077	57,358
	2016/17	2,618	8,728	16,227	27,573	59,216	23,803	83,019
	Av. Annual change	12%	5%	1%	3%	11%	5%	9%
Ballarat	2011/12	22	573	1,612	2,207	290	1,353	1,644
	2016/17	30	719	1,895	2,645	445	1,526	1,971
	Av. Annual change	7%	5%	4%	4%	11%	3%	4%
Bendigo Loddon	2011/12	19	919	2,482	3,420	161	2,284	2,445
	2016/17	19	1,057	2,565	3,640	217	2,647	2,864
	Av. Annual change	0%	3%	1%	1%	7%	3%	3%
Central Highlands	2011/12	22	319	494	835	92	784	876
	2016/17	42	450	445	937	145	1,096	1,241
	Av. Annual change	18%	8%	-2%	2%	12%	8%	8%
Central Murray	2011/12	9	674	793	1,476	309	2,182	2,491
	2016/17	15	775	896	1,686	201	2,318	2,518
	Av. Annual change	12%	3%	3%	3%	-7%	1%	0%
Geelong and the Bellarine	2011/12	40	972	2,992	4,004	735	2,648	3,383
	2016/17	52	1,404	3,842	5,298	952	3,689	4,641
	Av. Annual change	6%	9%	6%	6%	6%	8%	7%
Gippsland	2011/12	30	937	2,538	3,504	456	2,437	2,894
	2016/17	47	1,248	3,061	4,355	529	3,397	3,926
	Av. Annual change	12%	7%	4%	5%	3%	8%	7%
Goulburn	2011/12	12	438	1,324	1,774	419	1,048	1,467
	2016/17	21	625	1,457	2,103	659	1,411	2,069
	Av. Annual change	17%	9%	2%	4%	11%	7%	8%
Great Ocean Road	2011/12	127	1,574	2,537	4,238	486	4,822	5,308
	2016/17	220	2,060	2,824	5,105	1,039	5,953	6,992
	Av. Annual change	15%	6%	2%	4%	23%	5%	6%
High Country	2011/12	20	1,242	1,555	2,817	200	3,863	4,063
	2016/17	35	1,538	1,755	3,328	621	4,493	5,114
	Av. Annual change	14%	5%	3%	4%	42%	3%	5%
Lakes	2011/12	30	539	546	1,115	149	1,787	1,935
	2016/17	45	753	534	1,332	127	2,092	2,219
	Av. Annual change	10%	8%	0%	4%	-3%	3%	3%
Macedon	2011/12	7	210	1,123	1,340	102	575	677
	2016/17	8	324	1,196	1,527	120	773	893
	Av. Annual change	2%	11%	1%	3%	4%	7%	6%

Source: Tourism Research Australia

	Total tourism visitation					Total tourism nights		
		Visitors (000)				Nights (000)		
Stopover region	Financial year	Int'l	Dom. overnight	Dom. daytrips	Total	Int'l	Dom. overnight	Total
Mallee	2011/12	19	581	604	1,204	614	1,850	2,464
	2016/17	26	733	506	1,265	669	1,922	2,592
	Av. Annual change	7%	5%	-3%	1%	2%	1%	1%
Melbourne East	2011/12	25	418	2,964	3,407	349	987	1,336
	2016/17	47	673	3,518	4,237	825	1,544	2,369
	Av. Annual change	18%	12%	4%	5%	27%	11%	15%
Murray East	2011/12	4*	121	187*	313	64*	560	625
	2016/17	2*	195	143*	340	17*	436	454
	Av. Annual change	-11%	12%	-5%	2%	-15%	-4%	-5%
Peninsula	2011/12	36	1,186	4,050	5,272	482	3,702	4,184
	2016/17	61	1,416	4,684	6,161	1,142	4,063	5,205
	Av. Annual change	14%	4%	3%	3%	27%	2%	5%
Phillip Island	2011/12	28	777	1,064	1,869	170	2,184	2,354
	2016/17	54	873	1,359	2,286	151	2,628	2,779
	Av. Annual change	19%	2%	6%	4%	-2%	4%	4%
Spa Country	2011/12	4*	261	590	855	41*	545	587
	2016/17	10	338	729	1,077	40	750	790
	Av. Annual change	27%	6%	5%	5%	-1%	8%	7%
Upper Yarra	2011/12	4*	227	701	932	17*	507	524
	2016/17	3*	323	641	967	14*	635	650
	Av. Annual change	-3%	8%	-2%	1%	-3%	5%	5%
Western Grampians	2011/12	8	224	382	613	102	528	631
	2016/17	8	355	533	896	71	806	877
	Av. Annual change	2%	12%	8%	9%	-6%	11%	8%
Wimmera	2011/12	2*	130	130*	262	81*	286	367
	2016/17	6*	166	133*	305	177*	365	542
	Av. Annual change	40%	6%	0%	3%	24%	6%	10%
Regional Victoria	2011/12	326	11,570	28,668	40,564	5,319	34,932	40,251
	2016/17	526	15,110	32,715	48,351	8,161	42,544	50,705
	Av. Annual change	12%	6%	3%	4%	10%	4%	5%
Victoria	**2011/12**	**1,739**	**17,909**	**44,119**	**63,767**	**43,600**	**54,009**	**97,609**
	2016/17	**2,761**	**23,150**	**48,942**	**74,853**	**67,377**	**66,347**	**133,724**
	Av. Annual change	**12%**	**6%**	**2%**	**4%**	**11%**	**5%**	**7%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

Economic contribution of tourism

Total tourism expenditure						
		Regional expenditure ($M)				Employment
Stopover region	Financial year	Int'l	Dom. overnight	Dom. daytrips	Total	Total
Melbourne	2011/12	3,854	5,695	1,825	11,374	79,100
	2016/17	6,955	7,449	1,812	16,215	
	Av. Annual change	16%	6%	0%	9%	
Ballarat	2011/12	37	180	178	395	2,900
	2016/17	36	209	225	470	
	Av. Annual change	-1%	3%	5%	4%	
Bendigo Loddon	2011/12	10	241	243	494	3,500
	2016/17	12	270	261	544	
	Av. Annual change	4%	2%	1%	2%	
Central Highlands	2011/12	5	93	44	142	1,700
	2016/17	8	139	31	178	
	Av. Annual change	12%	10%	-6%	5%	
Central Murray	2011/12	12	247	63	322	3,300
	2016/17	11	278	118	407	
	Av. Annual change	-2%	3%	17%	5%	
Geelong and the Bellarine	2011/12	54	351	292	697	5,900
	2016/17	82	499	326	907	
	Av. Annual change	10%	8%	2%	6%	
Gippsland	2011/12	26	237	203	466	4,100
	2016/17	19	340	227	585	
	Av. Annual change	-5%	9%	2%	5%	
Goulburn	2011/12	19	86	142	247	2,400
	2016/17	45	164	143	352	
	Av. Annual change	27%	18%	0%	9%	
Great Ocean Road	2011/12	68	683	256	1,007	8,300
	2016/17	108	870	284	1,262	
	Av. Annual change	12%	5%	2%	5%	
High Country	2011/12	14	571	158	743	6,300
	2016/17	31	624	158	813	
	Av. Annual change	24%	2%	0%	2%	
Lakes	2011/12	6	212	70	288	2,600
	2016/17	7	225	47	279	
	Av. Annual change	3%	1%	-7%	-1%	
Macedon	2011/12	6	45	76	127	1,200
	2016/17	6	102	91	200	
	Av. Annual change	0%	25%	4%	11%	

Source: Tourism Research Australia

Total tourism expenditure						
		Regional expenditure ($M)				Employment
Stopover region	Financial year	Int'l	Dom. overnight	Dom. daytrips	Total	Total
Mallee	2011/12	31	245	77	354	2,900
	2016/17	25	321	76	421	
	Av. Annual change	-4%	6%	0%	4%	
Melbourne East	2011/12	20	164	229	413	4,500
	2016/17	50	198	278	526	
	Av. Annual change	30%	4%	4%	5%	
Murray East	2011/12	np*	76	np*	97	500
	2016/17	np*	45	np*	61	
	Av. Annual change	np	-8%	np	-7%	
Peninsula	2011/12	37	392	261	690	6,700
	2016/17	65	464	384	913	
	Av. Annual change	15%	4%	9%	6%	
Phillip Island	2011/12	12	274	118	404	3,300
	2016/17	17	351	120	488	
	Av. Annual change	8%	6%	0%	4%	
Spa Country	2011/12	np*	96	47	145	2,100
	2016/17	5	157	69	230	
	Av. Annual change	np	13%	9%	12%	
Upper Yarra	2011/12	np*	33	53	88	700
	2016/17	np*	67	36	104	
	Av. Annual change	np	21%	-6%	4%	
Western Grampians	2011/12	2	65	51	118	1,200
	2016/17	2	105	68	175	
	Av. Annual change	0%	12%	7%	10%	
Wimmera	2011/12	np*	np	np*	np	500
	2016/17	np*	np	np*	np	
	Av. Annual change	np	np	np	np	
Regional Victoria	2011/12	367	4,326	2,590	7,285	64,700
	2016/17	541	5,467	2,968	8,976	
	Av. Annual change	9%	5%	3%	5%	
Victoria	**2011/12**	**4,221**	**10,021**	**4,415**	**18,659**	**143,800**
	2016/17	**7,496**	**12,916**	**4,780**	**25,191**	
	Av. Annual change	**16%**	**6%**	**2%**	**7%**	

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Self-drive tourism

Drive tourism visitation						Total tourism nights		
		Visitors (000)				Nights (000)		
Stopover region	Financial year	Int'l	Dom. overnight	Dom. daytrips	Total	Int'l	Dom. overnight	Total
Melbourne	2011/12	576	3,133	12,565	16,274	16,925	7,385	24,310
	2016/17	928	3,770	13,118	17,815	25,132	8,871	34,003
	Av. Annual change	12%	4%	1%	2%	10%	4%	8%
Ballarat	2011/12	19	495	1,487	2,001	144	938	1,082
	2016/17	23	642	1,792	2,457	277	1,312	1,589
	Av. Annual change	4%	6%	4%	5%	19%	8%	9%
Bendigo Loddon	2011/12	15	786	2,316	3,117	125	1,680	1,805
	2016/17	13	916	2,402	3,330	153	2,260	2,413
	Av. Annual change	-3%	3%	1%	1%	5%	7%	7%
Central Highlands	2011/12	18	308	432	758	54	758	812
	2016/17	34	419	442	895	125	1,030	1,155
	Av. Annual change	18%	7%	0%	4%	26%	7%	8%
Central Murray	2011/12	7	609	730	1346	178	2018	2,196
	2016/17	11	730	880	1621	100	2121	2,221
	Av. Annual change	14%	4%	4%	4%	-9%	1%	0%
Geelong and the Bellarine	2011/12	30	858	2,797	3,685	311	2,315	2,626
	2016/17	37	1,167	3,602	4,807	470	3,034	3,504
	Av. Annual change	5%	7%	6%	6%	10%	6%	7%
Gippsland	2011/12	24	848	2,473	3,345	165	2,060	2,225
	2016/17	41	1,158	2,976	4,174	349	3,050	3,399
	Av. Annual change	14%	7%	4%	5%	22%	10%	11%
Goulburn	2011/12	8	407	1,301	1,716	155	927	1,082
	2016/17	14	590	1,408	2,012	219	1,334	1553
	Av. Annual change	15%	9%	2%	3%	8%	9%	9%
Great Ocean Road	2011/12	109	1,457	2,460	4,025	354	4,408	4,762
	2016/17	187	1,963	2,777	4,927	710	5,633	6,344
	Av. Annual change	14%	7%	3%	4%	20%	6%	7%
High Country	2011/12	15	1,101	1,497	2,613	138	3,235	3,373
	2016/17	25	1,441	1,749	3,215	371	4,094	4,465
	Av. Annual change	13%	6%	3%	5%	34%	5%	6%
Lakes	2011/12	26	486	543	1,055	63	1,544	1,607
	2016/17	43	701	528	1,272	87	1,968	2,055
	Av. Annual change	12%	9%	-1%	4%	8%	5%	6%
Macedon	2011/12	6*	177	1,019	1,202	94*	448	542
	2016/17	6*	280	1,145	1,431	61*	623	683
	Av. Annual change	0%	12%	2%	4%	-7%	8%	5%

Source: Tourism Research Australia

Drive tourism visitation						Total tourism nights		
		Visitors (000)				Nights (000)		
Stopover region	Financial year	Int'l	Dom. overnight	Dom. daytrips	Total	Int'l	Dom. overnight	Total
Mallee	2011/12	11	459	589	1059	124	1367	1491
	2016/17	15	652	485	1152	149	1608	1757
	Av. Annual change	9%	8%	-4%	2%	4%	4%	4%
Melbourne East	2011/12	20	352	2,825	3,197	249	750	999
	2016/17	34	586	3,388	4,008	551	1,200	1,751
	Av. Annual change	14%	13%	4%	5%	24%	12%	15%
Murray East	2011/12	3*	112	181*	296	50*	252	302
	2016/17	1*	176	132*	309	14*	376	390
	Av. Annual change	-12%	12%	-5%	1%	-14%	10%	6%
Peninsula	2011/12	29	1,083	3,852	4,964	310	3,240	3,550
	2016/17	50	1,310	4,624	5,984	829	3,720	4,549
	Av. Annual change	14%	4%	4%	4%	34%	3%	6%
Phillip Island	2011/12	23	716	1,041	1,780	81	2,024	2,105
	2016/17	48	824	1,331	2,203	131	2,490	2,621
	Av. Annual change	22%	3%	6%	5%	13%	5%	5%
Spa Country	2011/12	4*	236	587	827	35*	491	526
	2016/17	7*	325	701	1,033	28*	716	744
	Av. Annual change	16%	8%	4%	5%	-4%	9%	8%
Upper Yarra	2011/12	3*	215	682	900	14*	476	490
	2016/17	2*	312	631	945	11*	605	617
	Av. Annual change	-5%	9%	-1%	1%	-4%	5%	5%
Western Grampians	2011/12	7	205	361	573	92	491	584
	2016/17	8	326	522	856	58	732	790
	Av. Annual change	3%	12%	9%	10%	-7%	10%	7%
Wimmera	2011/12	np*	124	118*	242	np*	277	277
	2016/17	5*	159	133*	297	37*	331	368
	Av. Annual change	np	6%	3%	5%	np	4%	7%
Regional Victoria	2011/12	252	10,412	27,292	37,956	2,743	29,699	32,442
	2016/17	409	13,894	31,646	45,949	4,730	38,237	42,967
	Av. Annual change	12%	7%	3%	4%	14%	6%	6%
Victoria	**2011/12**	**687**	**13,226**	**39,856**	**53,769**	**19,668**	**37,084**	**56,752**
	2016/17	**1,095**	**17,242**	**44,764**	**63,101**	**29,862**	**47,108**	**76,970**
	Av. Annual change	**12%**	**6%**	**3%**	**4%**	**10%**	**5%**	**7%**

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Self-drive tourism

Drive tourism expenditure					
		Regional Expenditure ($m)			
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Dom. daytrips**	**Total**
Melbourne	2011/12	1,319	1,312	1,402	4,033
	2016/17	2,381	1,752	1,328	5,460
	Av. Annual change	16%	7%	-1%	7%
Ballarat	2011/12	14	140	170	325
	2016/17	25	184	215	424
	Av. Annual change	16%	6%	5%	6%
Bendigo Loddon	2011/12	7	165	224	397
	2016/17	8	229	251	487
	Av. Annual change	3%	8%	2%	5%
Central Highlands	2011/12	3	85	40	129
	2016/17	7	133	30	170
	Av. Annual change	27%	11%	-5%	6%
Central Murray	2011/12	5	217	60	282
	2016/17	7	257	117	381
	Av. Annual change	8%	4%	19%	7%
Geelong and the Bellarine	2011/12	24	257	275	556
	2016/17	42	368	313	723
	Av. Annual change	15%	9%	3%	6%
Gippsland	2011/12	9	171	197	378
	2016/17	12	284	223	519
	Av. Annual change	7%	13%	3%	7%
Goulburn	2011/12	6	71	139	216
	2016/17	9	146	139	294
	Av. Annual change	10%	21%	0%	7%
Great Ocean Road	2011/12	54	593	246	894
	2016/17	82	785	281	1,148
	Av. Annual change	10%	6%	3%	6%
High Country	2011/12	9	456	151	617
	2016/17	18	591	157	766
	Av. Annual change	20%	6%	1%	5%
Lakes	2011/12	3	189	69	262
	2016/17	6	203	47	255
	Av. Annual change	20%	1%	-6%	-1%
Macedon	2011/12	np*	33	70	108
	2016/17	np*	77	88	167
	Av. Annual change	np	27%	5%	11%

Source: Tourism Research Australia

Drive tourism expenditure					
		Regional Expenditure ($m)			
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Dom. daytrips**	**Total**
Mallee	2011/12	4	160	76	240
	2016/17	5	262	73	340
	Av. Annual change	5%	13%	-1%	8%
Melbourne East	2011/12	15	100	221	337
	2016/17	34	158	271	463
	Av. Annual change	25%	12%	5%	7%
Murray East	2011/12	np*	34	np*	54
	2016/17	np*	36	np*	51
	Av. Annual change	np	1%	np	-1%
Peninsula	2011/12	26	309	254	589
	2016/17	45	412	375	832
	Av. Annual change	15%	7%	10%	8%
Phillip Island	2011/12	8	261	117	387
	2016/17	15	327	119	461
	Av. Annual change	18%	5%	0%	4%
Spa Country	2011/12	np*	89	47	137
	2016/17	np*	148	67	218
	Av. Annual change	np	13%	9%	12%
Upper Yarra	2011/12	np*	29	50	81
	2016/17	np*	63	36	99
	Av. Annual change	np	23%	-6%	4%
Western Grampians	2011/12	2	51	49	102
	2016/17	2	91	68	161
	Av. Annual change	0%	16%	8%	12%
Wimmera	2011/12	np*	np	np*	np
	2016/17	np*	np	np*	np
	Av. Annual change	np	np	np	np
Regional Victoria	2011/12	197	3,441	2,484	6,131
	2016/17	326	4,791	2,896	8,009
	Av. Annual change	13%	8%	3%	6%
Victoria	**2011/12**	**1,516**	**4,753**	**3,886**	**10,164**
	2016/17	**2,707**	**6,543**	**4,224**	**13,469**
	Av. Annual change	**16%**	**8%**	**2%**	**7%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

Caravan and camping

Caravan and camping expenditure

		Visitors (000)			Nights (000)		
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Total**	**Int'l**	**Dom. overnight**	**Total**
Melbourne	2011/12	14	46*	60	72	167*	239
	2016/17	18	52*	71	81	181*	262
	Av. Annual change	6%	3%	3%	2%	2%	2%
Ballarat	2011/12	3*	45*	47	8*	130*	138
	2016/17	4*	55*	59	6*	155*	162
	Av. Annual change	9%	5%	5%	-4%	4%	3%
Bendigo Loddon	2011/12	2*	98	101	8	267	274
	2016/17	0*	102	102	2	315	318
	Av. Annual change	-18%	1%	0%	-14%	4%	3%
Central Highlands	2011/12	5	53*	58	12	135*	147
	2016/17	7	60*	67	14	177*	191
	Av. Annual change	8%	3%	3%	4%	6%	6%
Central Murray	2011/12	1*	131	132	32*	651	683
	2016/17	1*	149	150	21*	482	503
	Av. Annual change	-4%	3%	3%	-7%	-5%	-5%
Geelong and the Bellarine	2011/12	5	137	142	8	568	577
	2016/17	5*	129	133	8*	487	495
	Av. Annual change	-2%	-1%	-1%	-2%	-3%	-3%
Gippsland	2011/12	5	91	96	21	256	276
	2016/17	10	123	133	31	394	424
	Av. Annual change	20%	7%	8%	10%	11%	11%
Goulburn	2011/12	2*	49*	51	31*	142*	173
	2016/17	1*	49*	51	15*	116*	131
	Av. Annual change	-6%	0%	0%	-10%	-4%	-5%
Great Ocean Road	2011/12	22	248	270	65	943	1,008
	2016/17	33	347	381	99	1,217	1,316
	Av. Annual change	10%	8%	8%	10%	6%	6%
High Country	2011/12	3*	144	147	12*	519	531
	2016/17	2*	167	169	7*	609	616
	Av. Annual change	-4%	3%	3%	-8%	3%	3%
Lakes	2011/12	9	119	129	14	556	570
	2016/17	13	133	146	25	483	508
	Av. Annual change	8%	2%	3%	16%	-3%	-2%
Macedon	2011/12	1*	14*	15	1*	32*	33
	2016/17	0*	14*	14	0*	71*	71
	Av. Annual change	-9%	0%	-1%	-15%	25%	23%

Source: Tourism Research Australia

Caravan and camping expenditure

		Visitors (000)			Nights (000)		
Stopover region	**Financial year**	**Int'l**	**Dom. overnight**	**Total**	**Int'l**	**Dom. overnight**	**Total**
Mallee	2011/12	3*	96	99	75*	360	435
	2016/17	3*	100	104	53*	322	375
	Av. Annual change	1%	1%	1%	-6%	-2%	-3%
Melbourne East	2011/12	1*	22*	23	12*	74*	86
	2016/17	1*	27*	28	2*	64*	66
	Av. Annual change	26%	4%	5%	-16%	-3%	-5%
Murray East	2011/12	1*	21*	22	1	74	75
	2016/17	0*	16*	17	0	41	42
	Av. Annual change	-16%	-4%	-5%	-17%	-9%	-9%
Peninsula	2011/12	1*	79*	81	5*	341*	346
	2016/17	2*	55*	58	13*	204*	217
	Av. Annual change	19%	-6%	-6%	35%	-8%	-7%
Phillip Island	2011/12	6	111	118	14	360	374
	2016/17	11	85*	96	20	321*	341
	Av. Annual change	14%	-5%	-4%	9%	-2%	-2%
Spa Country	2011/12	0*	14*	15	0*	40*	40
	2016/17	1*	20*	21	1*	46*	48
	Av. Annual change	65%	8%	9%	59%	3%	4%
Upper Yarra	2011/12	0*	37*	38	1*	83*	84*
	2016/17	0*	46*	46	1*	132*	133*
	Av. Annual change	-18%	5%	4%	-6%	12%	12%
Western Grampians	2011/12	1*	19*	20	3*	65*	67
	2016/17	2*	41*	42	8*	71*	78
	Av. Annual change	14%	24%	23%	41%	2%	3%
Wimmera	2011/12	0*	19*	19	1*	43*	44
	2016/17	1*	22*	22	1*	27*	27
	Av. Annual change	19%	3%	3%	-7%	-8%	-8%
Regional Victoria	2011/12	44	1,422	1,466	323	5,637	5,960
	2016/17	55	1,604	1,659	327	5,735	6,062
	Av. Annual change	5%	2%	3%	0%	0%	0%
Victoria	**2011/12**	**49**	**1,458**	**1,507**	**395**	**5,804**	**6,199**
	2016/17	**62**	**1,639**	**1,701**	**408**	**5,916**	**6,324**
	Av. Annual change	**5%**	**2%**	**3%**	**1%**	**0%**	**0%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

Caravan and camping

Caravan and camping visitation				
		Regional expenditure ($m)		
Stopover region	Financial year	Int'l	Dom. Overnight	Total
Melbourne	2011/12	8	30*	38
	2016/17	10	36*	46
	Av. Annual change	5%	4%	4%
Ballarat	2011/12	1*	19*	20
	2016/17	1*	23*	24
	Av. Annual change	0%	4%	4%
Bendigo Loddon	2011/12	1*	42	43
	2016/17	0*	42	42
	Av. Annual change	-20%	0%	3%
Central Highlands	2011/12	1	18*	19
	2016/17	1	22*	23
	Av. Annual change	0%	4%	4%
Central Murray	2011/12	1*	66	67
	2016/17	1*	69	70
	Av. Annual change	0%	1%	1%
Geelong and the Bellarine	2011/12	1	53	54
	2016/17	1*	74	75
	Av. Annual change	0%	8%	8%
Gippsland	2011/12	1	27	28
	2016/17	1	35	36
	Av. Annual change	0%	6%	6%
Goulburn	2011/12	1*	9*	10
	2016/17	0*	12*	12
	Av. Annual change	-20%	7%	4%
Great Ocean Road	2011/12	10	116	126
	2016/17	9	172	181
	Av. Annual change	2%	10%	9%
High Country	2011/12	2*	73	75
	2016/17	0*	69	69
	Av. Annual change	-20%	-1%	-2%
Lakes	2011/12	1	60	61
	2016/17	1	49	50
	Av. Annual change	0%	-4%	-4%
Macedon	2011/12	0*	2*	2
	2016/17	0*	19*	19
	Av. Annual change	np	170%	170%

Source: Tourism Research Australia

Caravan and camping visitation				
		Regional expenditure ($m)		
Stopover region	Financial year	Int'l	Dom. Overnight	Total
Mallee	2011/12	3	49	52
	2016/17	1	49	50
	Av. Annual change	-13%	0%	-1%
Melbourne East	2011/12	1*	5*	6
	2016/17	0*	10*	10
	Av. Annual change	-20%	20%	13%
Murray East	2011/12	0*	5*	5
	2016/17	0*	6*	6
	Av. Annual change	np	4%	4%
Peninsula	2011/12	0*	24*	24
	2016/17	1*	20*	21
	Av. Annual change	np	-3%	-3%
Phillip Island	2011/12	1	45	46
	2016/17	2	46	46
	Av. Annual change	20%	0%	1%
Spa Country	2011/12	0*	8*	8
	2016/17	0*	8*	8
	Av. Annual change	np	0%	0%
Upper Yarra	2011/12	0*	7*	7
	2016/17	0*	14*	14
	Av. Annual change	np	20%	20%
Western Grampians	2011/12	0*	7*	7
	2016/17	0*	10*	10
	Av. Annual change	np	9%	9%
Wimmera	2011/12	0*	4	4
	2016/17	0*	4	4
	Av. Annual change	np	0%	0%
Regional Victoria	2011/12	25	640	665
	2016/17	20	752	772
	Av. Annual change	-4%	4%	3%
Victoria	**2011/12**	**33**	**669**	**702**
	2016/17	**30**	**789**	**819**
	Av. Annual change	**-2%**	**4%**	**3%**

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

2026-27 projections

Visitor nights and self-drive visitation

VIC	All tourism nights (000)				
	Melbourne		Regional VIC		
	International	Domestic Overnight	International	Domestic Overnight	Total
2017-18	64,559	24,756	9,069	41,680	140,065
2018-19	69,067	25,564	9,715	42,729	147,075
2019-20	73,629	26,298	10,312	43,666	153,906
2020-21	78,166	27,019	10,908	44 578	160,670
2021-22	82,891	27,735	11,534	45 461	167,621
2022-23	87,792	28,447	12,204	46 314	174,758
2023-24	92,960	29,162	12,897	47,165	182,185
2024-25	98,369	29,881	13,628	48,012	189,890
2025-26	104,108	30,604	14,405	48,855	197,972
2026-27	110,209	31,329	15,228	49,693	206,459

VIC	Self drive tourism nights (000)				
	Melbourne		Regional VIC		
	International	Domestic Overnight	International	Domestic Overnight	Total
2017-18	27,972	9,405	4,967	36,448	78,792
2018-19	29,925	9,712	5,321	37,366	82,323
2019-20	31,901	9,991	5,647	38,185	85,725
2020-21	33,867	10,265	5,974	38,982	89,087
2021-22	35,914	10,537	6,317	39,754	92,522
2022-23	38,038	10,807	6,684	40,501	96,029
2023-24	40,277	11,079	7,063	41,245	99,664
2024-25	42,620	11,352	7,463	41,985	103,421
2025-26	45,107	11,626	7,889	42,722	107,345
2026-27	47,750	11,902	8,339	43,456	111,448

2026-27 projections

Expenditure — capital city and regional VIC

VIC	Overnight visitor expenditure ($m)		
	Melbourne	Regional VIC	
	Total	Total	Total
2017-18	14,836	6,213	21,049
2018-19	15,719	6,420	22,140
2019-20	16,599	6,608	23,207
2020-21	17,472	6,793	24,265
2021-22	18,376	6,978	25,354
2022-23	19,308	7,164	26,473
2023-24	20,286	7,353	27,639
2024-25	21,304	7,546	28,850
2025-26	22,377	7,744	30,121
2026-27	23,511	7,948	31,459

Data notes:

Source

- Tourism Research Australia (TRA)

Employment

- Estimates for each tourism region have been sourced from TRA's 2016-17 Regional Tourism Satellite Accounts.

Visitor Estimates

- Components may not add to totals as visitors may visit more than one tourism region on a trip.

Expenditure Estimates

- Expenditure excludes all motor vehicle, capital and major equipment purchases and for international visitors any pre-purchased international airfares and 70 per cent of pre-purchased packages assumed to be spent outside Australia.
- For self-drive, expenditure for each tourism region refers to total expenditure in that region by visitors who arrived by self-drive vehicle.
- For caravan and camping, expenditure for each tourism region refers to total expenditure in that region by visitors who stayed in a commercial caravan park or camping ground during their visit.

Tourism Region Estimates

- Tourism regions estimates for nearly all metrics are based on the region boundaries which applied in 2017. The caravan and camping expenditure estimates are based on 2018 region boundaries. The differences between 2017 and 2018 region boundaries are negligible.
- Where a tourism region is asterisked (*) one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.
- The Gold Coast tourism region is included in Regional Queensland estimates.

Inclusions and Exclusions

- Regional, State and National totals include relevant estimates from tourism regions where data has been confidentialised and not published (i.e. np cells).
- Regional, State and National totals exclude stopovers by visitors to unspecified, offshore and/or transit locations.

Projections

- Visitor overnight forecasts derived from TRA data
- Self-drive visits and visitor nights have been calculated using a five-year average of the percentage self-drive represents of all tourism
- Expenditure forecasts have been calculated using visitor nights as a pro rata proxy
- Care should be used when using forecasted numbers. Domestic and international geopolitical and economic events outside the scope of this report can impact both domestic and international visitor numbers, travel patterns and expenditure.

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