



# VFR Travel to Melbourne

year ended December 2012

Prepared for Destination Melbourne  
August 2013

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# Introduction

- This report analyses 'visiting friends and relatives' (VFR) travellers to Melbourne. The results are compared against non-VFR travel.
  - Some results are provided by Melbourne's five sub-regions (i.e. 'East', 'Inner', 'North', 'South', and 'West')
- The travel information for Melbourne is collected and reported by three separate sectors: Domestic overnight; International overnight; and Domestic daytrips. Consequently, each sector is analysed individually.
  - For an indication of total VFR travel to Melbourne, the report also provides information about total travel to the region (i.e. domestic overnight + international overnight + domestic daytrip).
- The report is based on information from the National Visitor Survey (NVS) and International Visitor Survey (IVS) - both datasets are managed and published by Tourism Research Australia (TRA).
- As overnight visitors to Melbourne may have more than one reason for visiting, the variable 'all destination purpose of visit' has been used to give the best possible estimate of **all** VFR travel. This may lead to some minor double counting of visitors. 'Main purpose of visit' has been used for domestic daytrips.
- The data used is subject to sampling variability. Users are advised to consult the data confidence tables contained in publications relevant to the datasets or otherwise available from TRA before drawing any conclusions or inferences, or taking any action, based on the data.

# New regional building blocks

- From 2012, all NVS and IVS data is based on SA2s in the Australian Statistical Geography Standard.
- SA2s do not fully align with the local government areas used to define the sub-regions in Melbourne. As a result, the boundaries for the sub-regions have changed.
- To ensure consistency of data over time, all NVS and IVS data back to 1999 has been converted to the new boundaries. This means the time series data in this report can be used for trend analysis and comparative purposes.
- However, due to these changes, the results in this report are not fully comparable with results from previous VFR reports for Melbourne (up to and including YE Dec 11).

# Key results (1 of 2)

## **Total travel to Melbourne in the YE Dec 12 on YE Dec 11**

- Melbourne received 25.8 million visitors - up by 9.3%.
- Visitors spent 60.6 million nights in the region - up by 4.9%.
- In total, visitors spent an estimated \$12.0 billion in Melbourne - up by 8.7%.
- VFR represented 34.3% of visitors and 31.3% of nights in the region – the proportion of visitors was up by 0.3% pts and the proportion of nights was up by 3.1% pts.

## **Domestic overnight VFR travel to Melbourne - YE Dec 12 on YE Dec 11**

- Melbourne received 2.4 million VFR visitors - up by 1.4%.
- VFR visitors spent 7.8 million nights in the region - up by 12.2%.
- In total, VFR visitors spent an estimated \$1.5 billion in Melbourne - up by 16.8%.
- VFR represented 34.3% of visitors and 38.6% of nights in the region – the proportion of visitors was down by 0.4% pts, while the proportion of nights was up by 2.2% pts.

## **Domestic overnight VFR travel to Melbourne's sub-regions in the YE Dec 12**

- The 'East' sub-region (66.7%) had the highest proportion of VFR visitors, while 'South' (65.8%) had the highest % of VFR nights.

## Key results (2 of 2)

### **International VFR travel to Melbourne - YE Dec 12 on YE Dec 11**

- Melbourne received 517,700 VFR visitors - up by 13.6%.
- VFR visitors spent 11.1 million nights in the region - up by 19.6%.
- In total, VFR visitors spent an estimated \$722 million in Melbourne - up by 4.8%.
- VFR represented 30.2% of visitors and 27.6% of nights in the region – the proportion of visitors was up by 2.4% pts and the proportion of nights was up by 3.5% pts.

### **International VFR travel to Melbourne's sub-regions in the YE Dec 12**

- The 'West' sub-region had the highest proportion of both VFR visitors (66.7%) and VFR nights (49.2%).

### **Domestic daytrip VFR travel to Melbourne - YE Dec 12 on YE Dec 11**

- Melbourne received 5.9 million VFR visitors - up by 14.1%.
- In total, VFR visitors spent an estimated \$453 million in the region - up by 31.9%.
- VFR travellers represented 34.7% of all visitors to Melbourne - up by 0.4% pts.

### **Domestic daytrip VFR travel to Melbourne's sub-regions in the YE Dec 12**

- The 'East' sub-region (49.3%) had the highest proportion of VFR visitors.

# Total travel

Travel by Australian residents and international visitors aged 15 and over.

## PLEASE NOTE:

The results for total travel in this section should be used as an indication only.

Travel information for Melbourne is collected and reported by three separate sectors: Domestic overnight; International overnight; and Domestic daytrips. Consequently, each sector should be analysed individually.

Some double counting may occur as visitors may have had more than one purpose of visit.

The data used is subject to sampling variability. Users are advised to consult the data confidence tables contained in publications relevant to the NVS and IVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

# Total travel to Melbourne

		Travel sector							
		Domestic overnight travel		International overnight travel		Domestic daytrip travel		Total travel	
Aspect		YE Dec 11	YE Dec 12	YE Dec 11	YE Dec 12	YE Dec 11	YE Dec 12	YE Dec 11	YE Dec 12
Visitors	('000)	6,857	7,033	1,637	1,716	15,096	17,045	23,590	25,794
	Share	29.1%	27.3%	6.9%	6.7%	64.0%	66.1%		
Nights	('000)	19,152	20,295	38,615	40,279			57,767	60,574
	Share	33.2%	33.5%	66.8%	66.5%				
Expenditure <sup>1</sup>	(\$ billion)	\$5.5	\$6.0	\$4.0	\$4.1	\$1.6	\$2.0	\$11.1	\$12.0
	Share	49.5%	49.5%	36.2%	34.0%	14.3%	16.5%		

<sup>1</sup> Source: Modelled visitor expenditure in Melbourne, YE Dec 12, Tourism Research Australia (domestic overnight expenditure includes airfares and long distance transport costs and international overnight expenditure includes package costs).

## In the YE Dec 12

- Melbourne received almost 25.8 million visitors - up by 9.3% on YE Dec 11.
- Visitors stayed for nearly 60.6 million nights - up by 4.9% on YE Dec 11.
- In total, visitors spent approximately \$12.0 billion in Melbourne – up by 8.7% on YE Dec 11.



# Total VFR travel to Melbourne

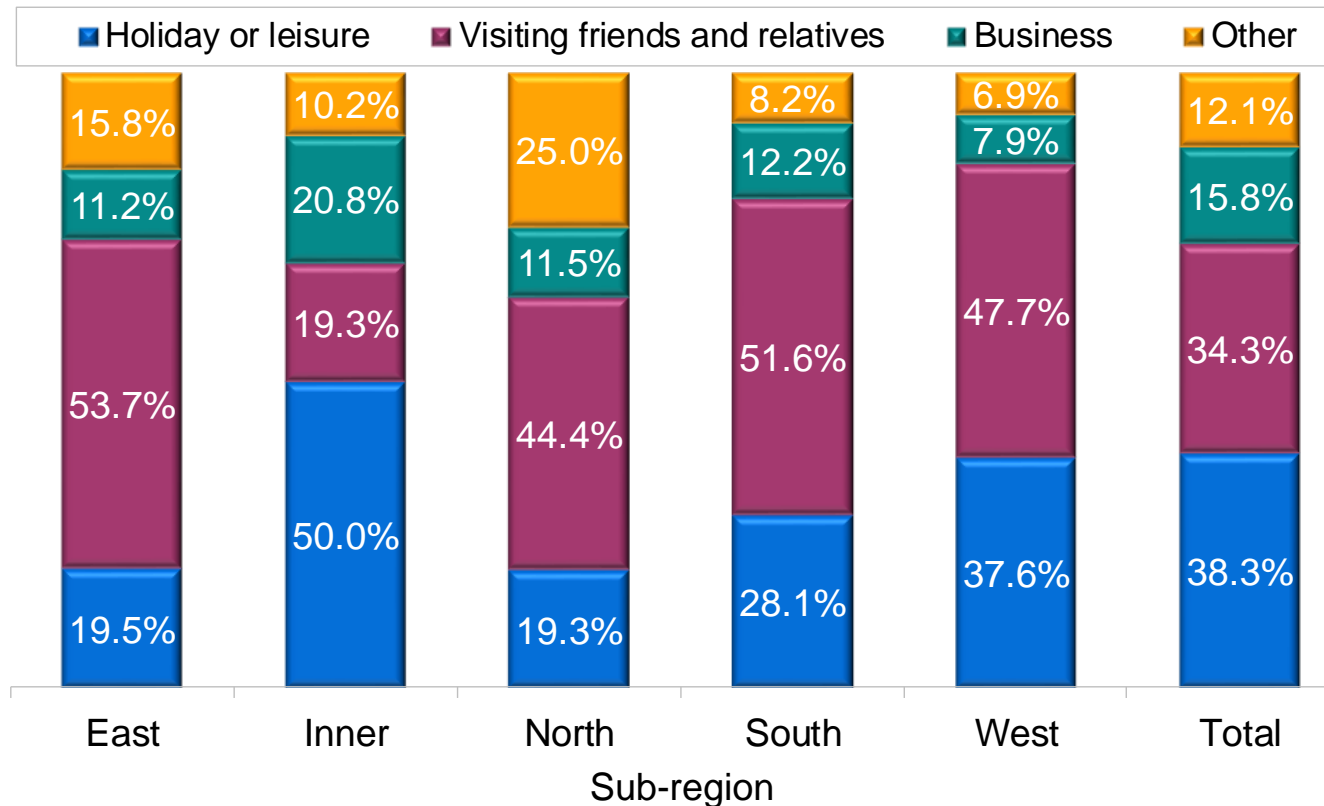
		Travel sector							
		Domestic overnight travel		International overnight travel		Domestic daytrip travel		Total travel	
Aspect		YE Dec 11	YE Dec 12	YE Dec 11	YE Dec 12	YE Dec 11	YE Dec 12	YE Dec 11	YE Dec 12
Visitors	('000)	2,376	2,410	456	518	5,185	5,918	8,017	8,846
	Share	29.6%	27.2%	5.7%	5.9%	64.7%	66.9%		
Nights	('000)	6,973	7,826	9,313	11,134			16,286	18,960
	Share	42.8%	41.3%	57.2%	58.7%				
Expenditure <sup>1</sup>	(\$ million)	\$1,256	\$1,468	\$689	\$722	\$344	\$453	\$2,289	\$2,643
	Share	54.9%	55.5%	30.1%	27.3%	15.0%	17.2%		

<sup>1</sup> Derived using Tourism Research Australia's modelled visitor expenditure in Melbourne (domestic overnight, international and domestic daytrips), modelled expenditure for international visitors in Victoria by purpose of visit and modelled destination only expenditure for domestic visitors in Victoria by purpose of visit.

## In the YE Dec 12

- Melbourne received over 8.8 million VFR visitors - up by 10.3% on YE Dec 11.
- VFR visitors stayed for nearly 19.0 million nights - up by 16.4% on YE Dec 11.
- In total, VFR visitors spent an estimated \$2.6 billion in Melbourne - up by 15.5% on YE Dec 11.

# Total visitors to Melbourne and sub-regions - by Purpose of visit



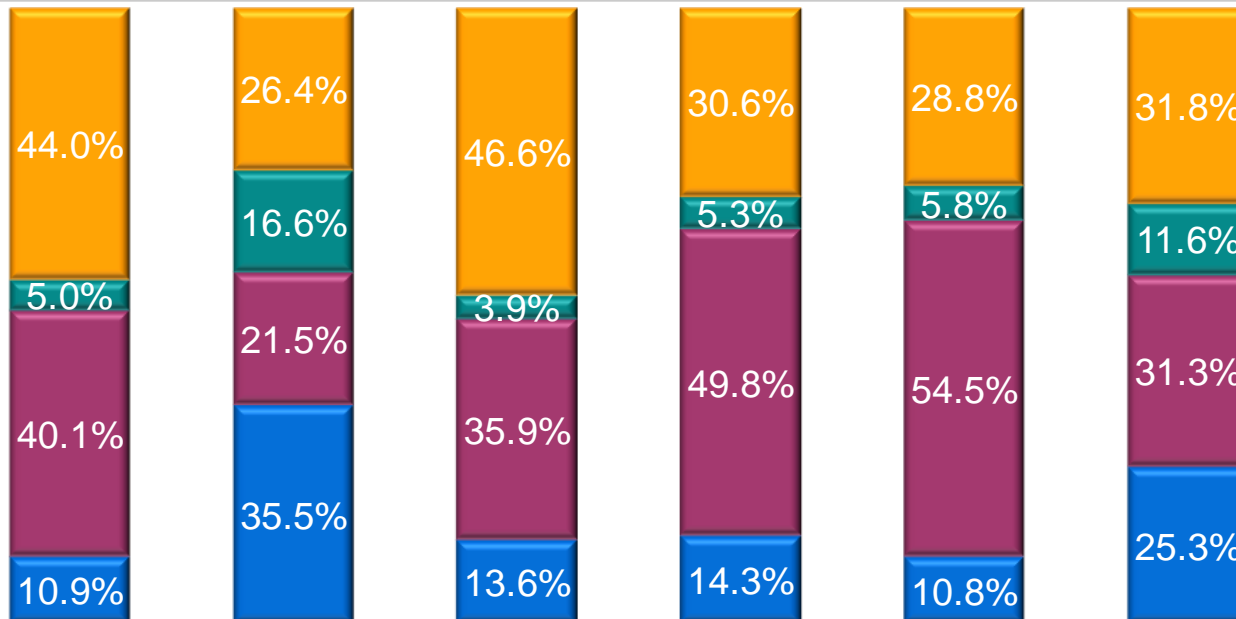
## In the YE Dec 12

- Over 1/3 (34.3%) of visitors to Melbourne travelled for the purpose of 'visiting friends and relatives' (VFR) - up by 0.3% pts on YE Dec 11.
- 'East' (53.7%) had the highest proportion of VFR visitors, followed by 'South' (51.6%) and 'West' (47.7%).
- Compared to YE Dec 11, the proportion of VFR visitors increased in 'East' (2.7% pts), while it decreased in 'Inner' (0.2% pts), 'North' (3.4% pts), 'South' (0.4% pts) and 'West' (6.1% pts).

Note: Visitors may have more than one purpose for visiting Melbourne or the sub-regions.

# Total visitor nights in Melbourne and sub-regions - by Purpose of visit

■ Holiday or leisure
 ■ Visiting friends and relatives
 ■ Business
 ■ Other



### In the YE Dec 12

- Over 3/10 (31.3%) of nights in Melbourne were for the purpose of 'visiting friends and relatives' (VFR) - up by 3.1% pts on YE Dec 11.
- 'West' (54.5%) had the highest proportion of VFR nights, followed by 'South' (49.8%) and 'East' (40.1%).
- Compared to YE Dec 11, the proportion of VFR nights increased in 'East' (7.4% pts), 'Inner' (3.6% pts) and 'West' (8.1% pts) while it decreased in 'North' (1.8% pts) and 'South' (1.7% pts) .

Sub-region

# Domestic overnight travel

Travel by Australian residents aged 15 and over.

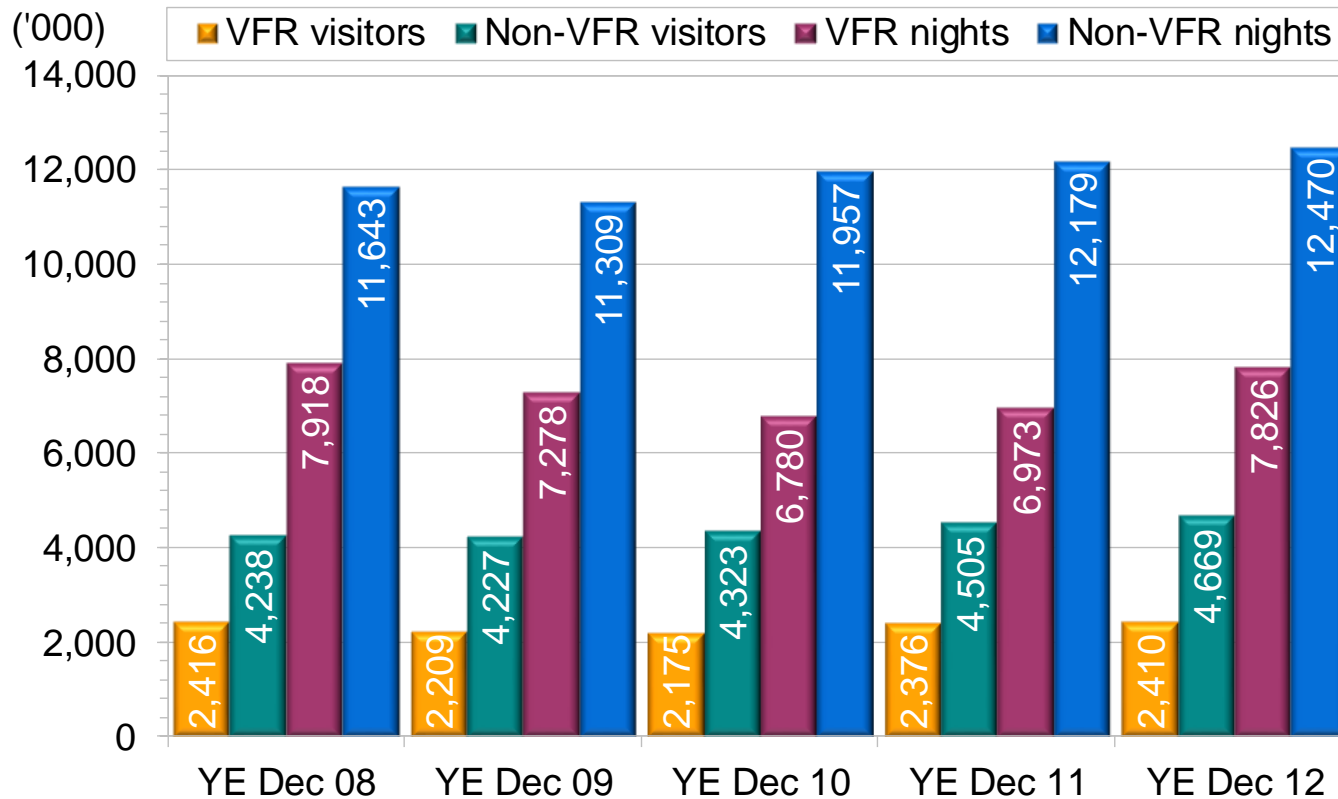
## PLEASE NOTE:

VFR = travelling for the purpose of visiting friends and relatives.

Some double counting may occur as visitors may have had more than one purpose of visit.

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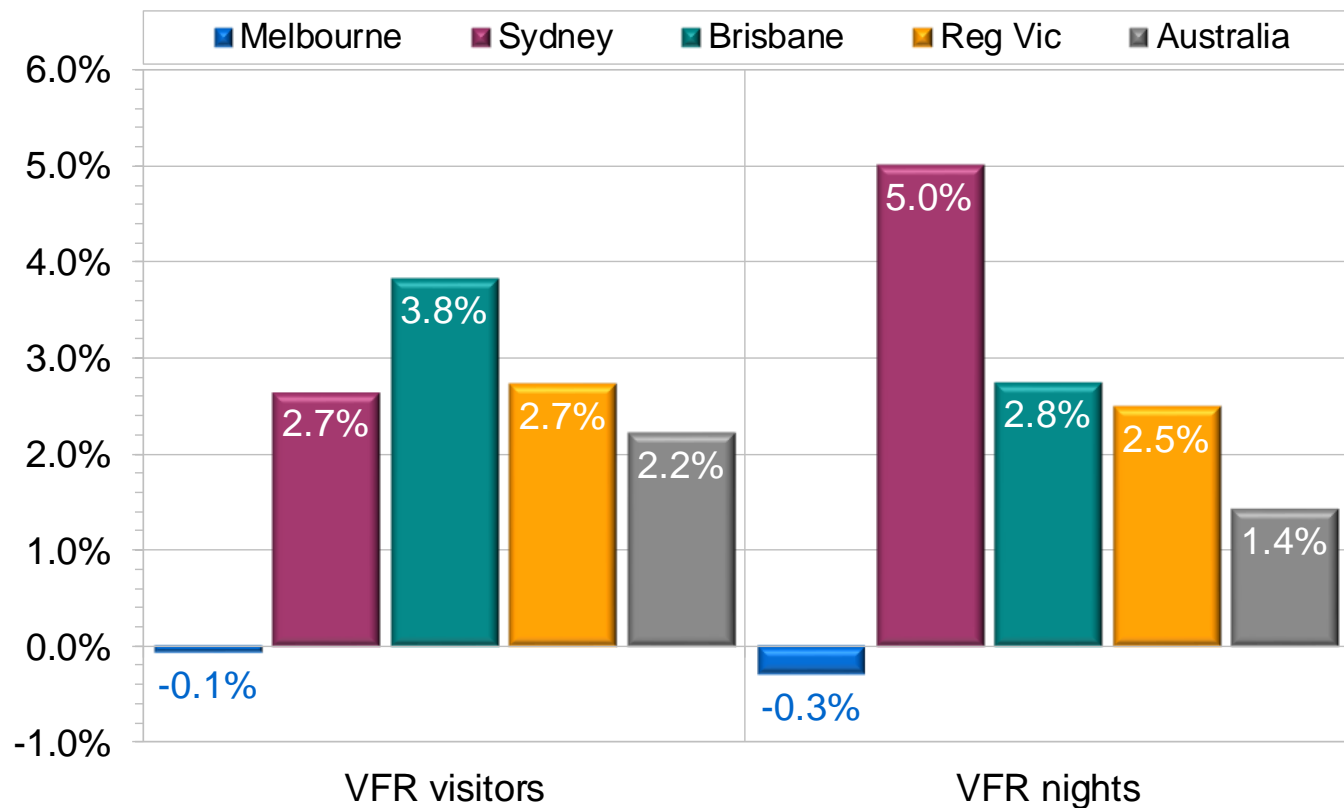
# Domestic overnight travel to Melbourne



## In the YE Dec 12

- Melbourne received over 2.4 million domestic overnight VFR **visitors** - up by 1.4% on the YE Dec 11, but down by 0.2% on the YE Dec 08.
- The region received nearly 4.7 million non-VFR visitors - up by 3.6% on the YE Dec 11 and by 10.2% on the YE Dec 08.
- VFR visitors spent over 7.8 million **nights** in Melbourne - up by 12.2% on the YE Dec 11, but down by 1.2% on the YE Dec 08.
- Non-VFR visitors spent nearly 12.5 million nights in the region - up by 2.4% on the YE Dec 11 and by 7.1% on the YE Dec 08.

# Average annual growth of domestic overnight VFR travel - by Selected destinations



**YE Dec 08 to YE Dec 12**

- Over the period, Melbourne experienced an average annual decline of 0.1% in domestic overnight VFR **visitors**.
- While Melbourne had a decline, Sydney, Brisbane, regional Victoria and Australia experienced growth.
- Over the period, Melbourne experienced an average annual decline of 0.3% in domestic VFR **nights**.
- While Melbourne had a decline, Sydney, Brisbane, regional Victoria and Australia experienced growth.

# Origin of domestic overnight visitors to Melbourne

Origin	VFR visitors ('000)				Non-VFR visitors ('000)			
	YE Dec 11	YE Dec 12	Market share	% change on previous year	YE Dec 11	YE Dec 12	Market share	% change on previous year
Regional Victoria	1,054	1,096	45.5%	4.0%	1,128	1,421	30.4%	26.0%
Melbourne	134	155	6.4%	15.7%	137	133	2.8%	-2.9%
Intrastate	1,188	1,251	51.9%	5.3%	1,264	1,554	33.3%	22.9%
New South Wales	541	472	19.6%	-12.8%	1,529	1,539	33.0%	0.7%
Queensland	226	252	10.5%	11.5%	614	481	10.3%	-21.7%
South Australia	177	175	7.3%	-1.1%	418	377	8.1%	-9.8%
Western Australia	80	114	4.7%	42.5%	291	317	6.8%	8.9%
Tasmania	83	76	3.2%	-8.4%	220	208	4.5%	-5.5%
Northern Territory	np	np	np	np	np	np	np	np
Australia Capital Territory	57	52	2.2%	-8.8%	121	155	3.3%	28.1%
Interstate	1,188	1,159	48.1%	-2.4%	3,241	3,115	66.7%	-3.9%
Total	2,376	2,410		1.4%	4,505	4,669		3.6%

## In the YE Dec 12

- Over ½ (51.9%) of domestic overnight **VFR visitors** to Melbourne came from intrastate – up 5.3% on YE Dec 11.
- Regional Victoria (45.5%) was the largest individual source market of VFR visitors – up by 4.0% on YE Dec 11. NSW (19.6%) was the 2<sup>nd</sup> largest source market – down by 12.8% on YE Dec 11.
- Over 1/3 (66.7%) of **non-VFR visitors** to Melbourne came from interstate – down by 3.9% on YE Dec 11.
- NSW (33.0%) was the largest individual source market of non-VFR visitors – up by 0.7% on YE Dec 11. Regional Victoria (30.4%) was the 2<sup>nd</sup> largest – up by 26.0% on YE Dec 11.

# Origin of domestic visitor nights in Melbourne

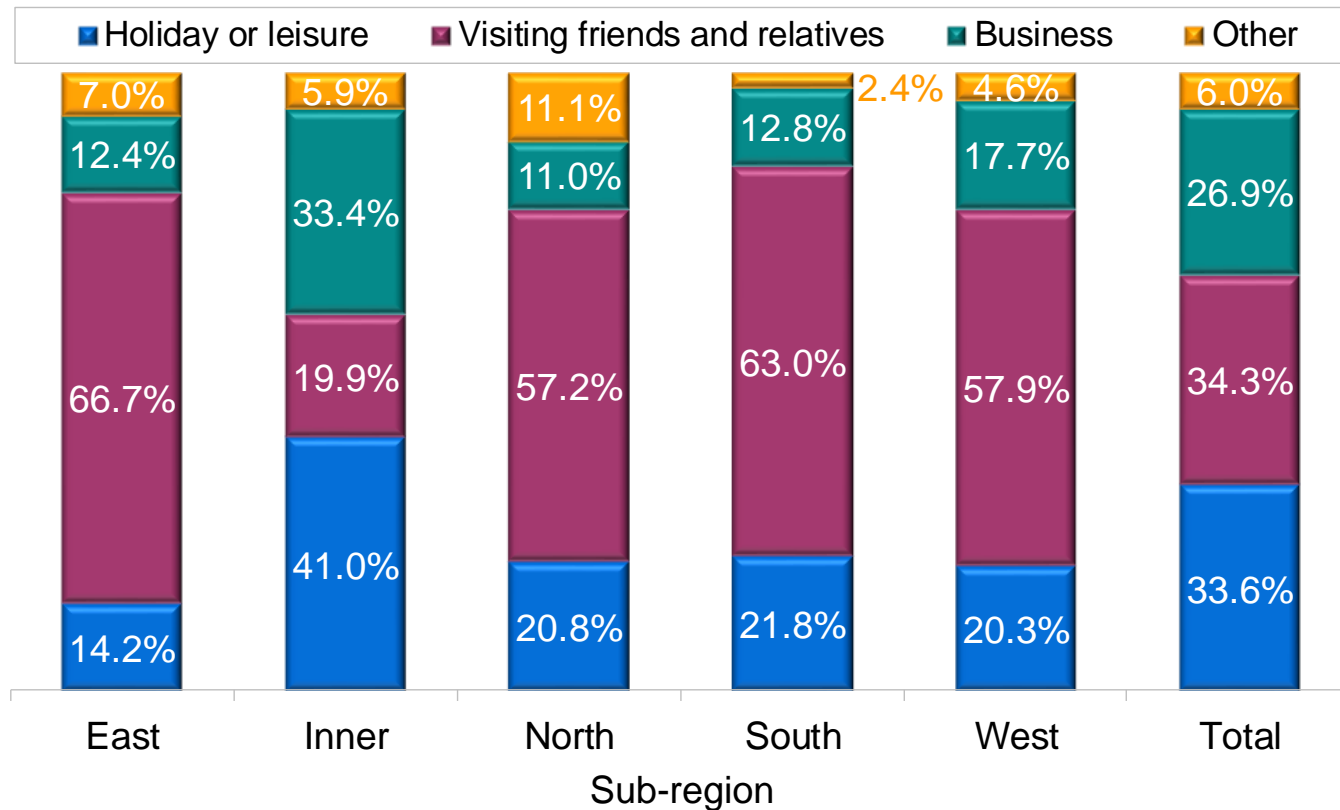
Origin	VFR nights ('000)				Non-VFR nights ('000)			
	YE Dec 11	YE Dec 12	Market share	% change on previous year	YE Dec 11	YE Dec 12	Market share	% change on previous year
Regional Victoria	1,944	2,174	27.8%	11.8%	2,065	2,745	22.0%	32.9%
Melbourne	np	np	np	np	np	np	np	np
Intrastate	2,135	2,414	30.8%	13.1%	2,335	2,934	23.5%	25.7%
New South Wales	1,978	1,891	24.2%	-4.4%	3,885	4,288	34.4%	10.4%
Queensland	1,053	1,369	17.5%	30.0%	2,099	1,711	13.7%	-18.5%
South Australia	697	628	8.0%	-9.9%	1,076	1,036	8.3%	-3.7%
Western Australia	np	706	9.0%	np	1,445	1,275	10.2%	-11.8%
Tasmania	np	np	np	np	716	571	4.6%	-20.3%
Northern Territory	np	np	np	np	np	np	np	np
Australia Capital Territory	np	np	np	np	np	np	np	np
Interstate	4,838	5,411	69.1%	11.8%	9,845	9,536	76.5%	-3.1%
Total	6,973	7,826		12.2%	12,179	12,470		2.4%

## In the YE Dec 12

- Over 2/3 (69.1%) of domestic **VFR nights** in Melbourne came from interstate – up 11.8% on YE Dec 11.
- Regional Victoria (27.8%) was the largest individual source market of VFR nights – up by 11.8% on YE Dec 11. NSW (24.2%) was the 2<sup>nd</sup> largest source market – down by 4.4% on YE Dec 11.
- Over ¾ (76.5%) of **non-VFR nights** in Melbourne came from interstate – down by 3.1% on YE Dec 11.
- NSW (34.4%) was the largest individual source market of non-VFR nights – up by 10.4% on YE Dec 11. Regional Victoria (22.0%) was the 2<sup>nd</sup> largest – up by 32.9% on YE Dec 11.



# Domestic overnight visitors to Melbourne & sub-regions - by Purpose of visit

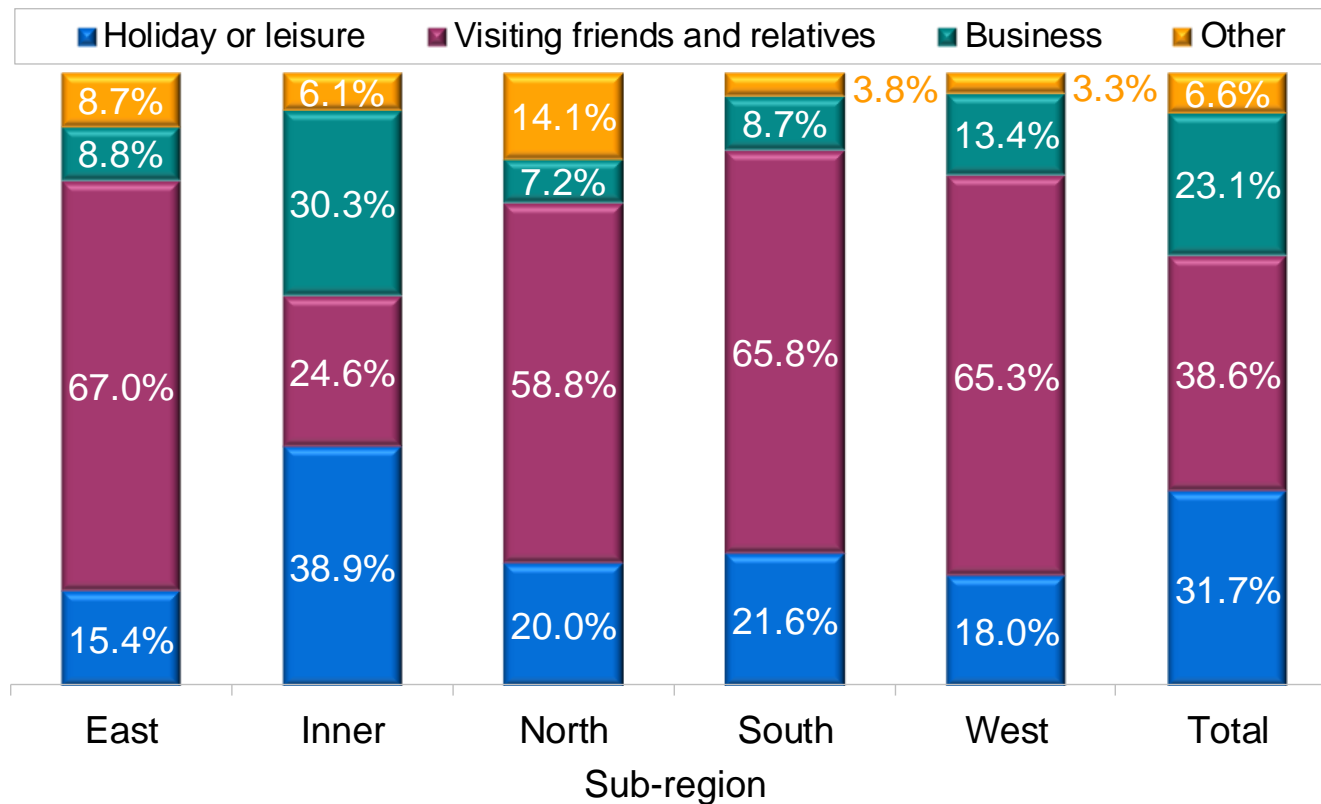


### In the YE Dec 12

- Over 1/3 (34.3%) of domestic overnight visitors to Melbourne travelled for the purpose of 'visiting friends and relatives' (VFR) - down by 0.4% pts on YE Dec 11.
- 'East' (66.7%) had the highest proportion of domestic overnight VFR visitors, followed by 'South' (63.0%) and 'West' (57.9%).
- Compared to YE Dec 11, the proportion of VFR visitors increased in 'East' (2.7% pts), 'Inner' (0.4% pts) and 'South' (3.1% pts) while it decreased in 'North' (5.7% pts) and 'West' (6.6% pts).

Note: Visitors may have more than one purpose for visiting Melbourne or the sub-regions.

# Domestic visitor nights in Melbourne and sub-regions - by Purpose of visit



### In the YE Dec 12

- Nearly 2/5 (38.6%) of domestic visitor nights in Melbourne were for the purpose of 'visiting friends and relatives' (VFR) - up by 2.2% pts on YE Dec 11.
- 'East' (67.0%) had the highest proportion of domestic VFR nights, followed by 'South' (65.8%) and 'West' (65.3%).
- Compared to YE Dec 11, the proportion of VFR nights increased in 'East' (4.6% pts), 'Inner' (2.2% pts), 'South' (1.5% pts) and 'West' (7.2% pts) while it decreased in 'North' (3.5% pts).

# Domestic overnight VFR visitors to Melbourne

## - detailed VFR by Sub-region

VFR visitors									
Sub-region	Visiting friends			Visiting relatives			Total VFR		
	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change
East	21.9%	25.7%	3.8	78.1%	74.5%	-3.6	64.0%	66.7%	2.7
Inner	38.2%	35.7%	-2.5	61.8%	64.3%	2.5	19.5%	19.9%	0.4
North	33.5%	17.9%	-15.6	66.5%	82.1%	15.6	62.9%	57.2%	-5.7
South	25.1%	27.9%	2.8	74.9%	72.1%	-2.8	59.9%	63.0%	3.1
West	23.4%	15.6%	-7.8	76.6%	84.9%	8.3	64.5%	57.9%	-6.6
Total	30.9%	27.4%	-3.5	69.1%	72.9%	3.8	34.7%	34.3%	-0.4

### In the YE Dec 12

- Nearly  $\frac{3}{4}$  (72.9%) of domestic overnight VFR **visitors** to Melbourne travelled for the purpose of visiting relatives – up by 3.8% pts on YE Dec 11.
- Over  $\frac{1}{4}$  (27.4%) of VFR **visitors** travelled for visiting friends – down by 3.5% pts on YE Dec 11.
- ‘Inner’ (35.7%) had the highest proportion of visiting friends **visitors** – down by 2.5% pts on YE Dec 11.
- ‘West’ (84.9%) had the highest proportion of visiting relatives **visitors** – up by 8.3% pts on YE Dec 11.

# Domestic VFR visitor nights in Melbourne

## - detailed VFR by Sub-region

VFR nights									
	Visiting friends			Visiting relatives			Total VFR		
Sub-region	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change
East	np	np	np	84.9%	79.9%	-5.0	62.4%	67.0%	4.6
Inner	28.6%	25.3%	-3.3	71.4%	74.7%	3.3	22.4%	24.6%	2.2
North	np	np	np	70.2%	82.2%	12.0	62.3%	58.8%	-3.5
South	np	np	np	79.2%	79.9%	0.7	64.3%	65.8%	1.5
West	np	np	np	80.1%	90.5%	10.4	58.1%	65.3%	7.2
Total	24.0%	20.4%	-3.6	76.0%	79.6%	3.6	36.4%	38.6%	2.2

### In the YE Dec 12

- Almost 4/5 (79.6%) of domestic VFR **nights** in Melbourne were for the purpose of visiting relatives – up by 3.6% pts on YE Dec 11.
- Over 1/5 (20.4%) of VFR **nights** were for visiting friends – down by 3.6% pts on YE Dec 11.
- ‘Inner’ (25.3%) had the highest proportion of visiting friends nights – down by 3.3% pts on YE Dec 11.
- ‘West’ (90.5%) had the highest proportion of visiting relatives nights – up 10.4% pts on YE Dec 11.

# International overnight travel

Travel by international short-term visitors aged 15 and over.

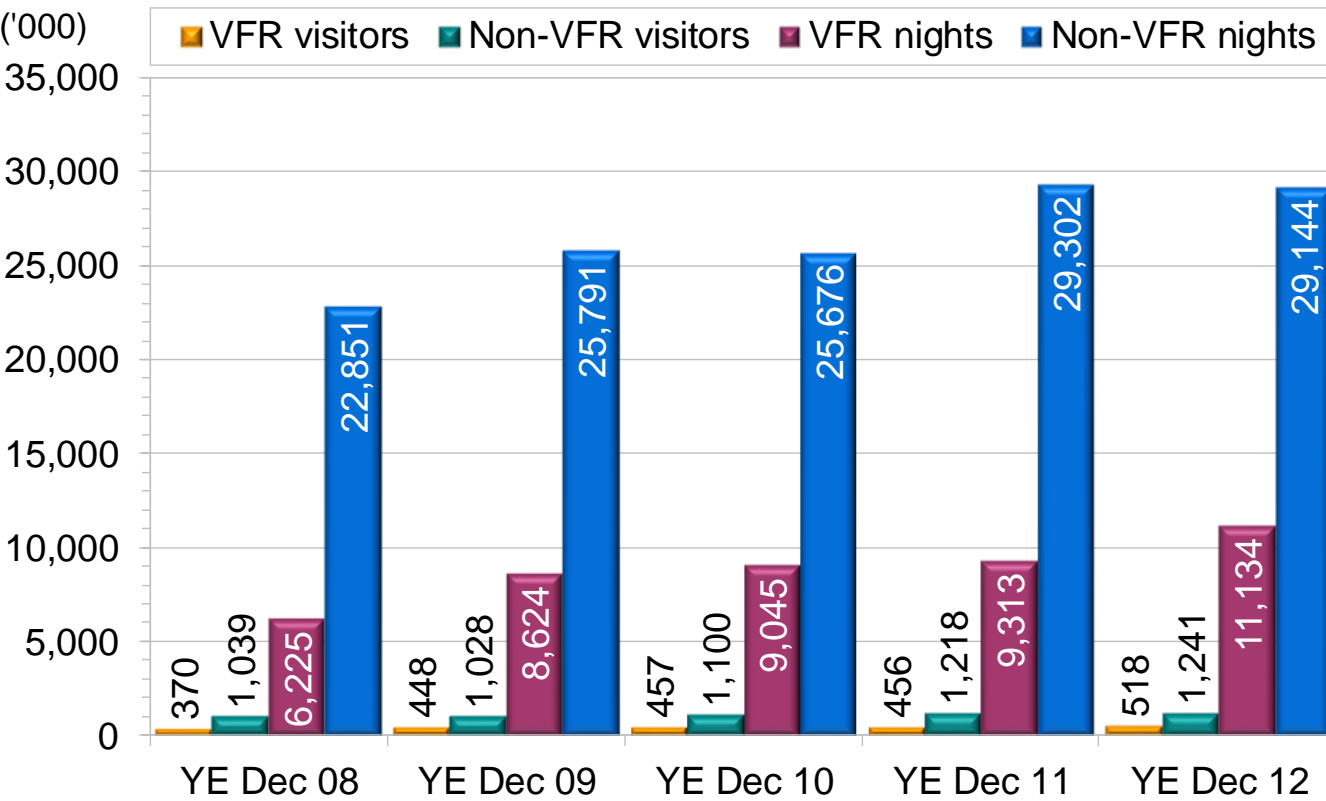
## PLEASE NOTE:

VFR = travelling for the purpose of visiting friends and relatives.

Some double counting may occur as visitors may have had more than one purpose of visit.

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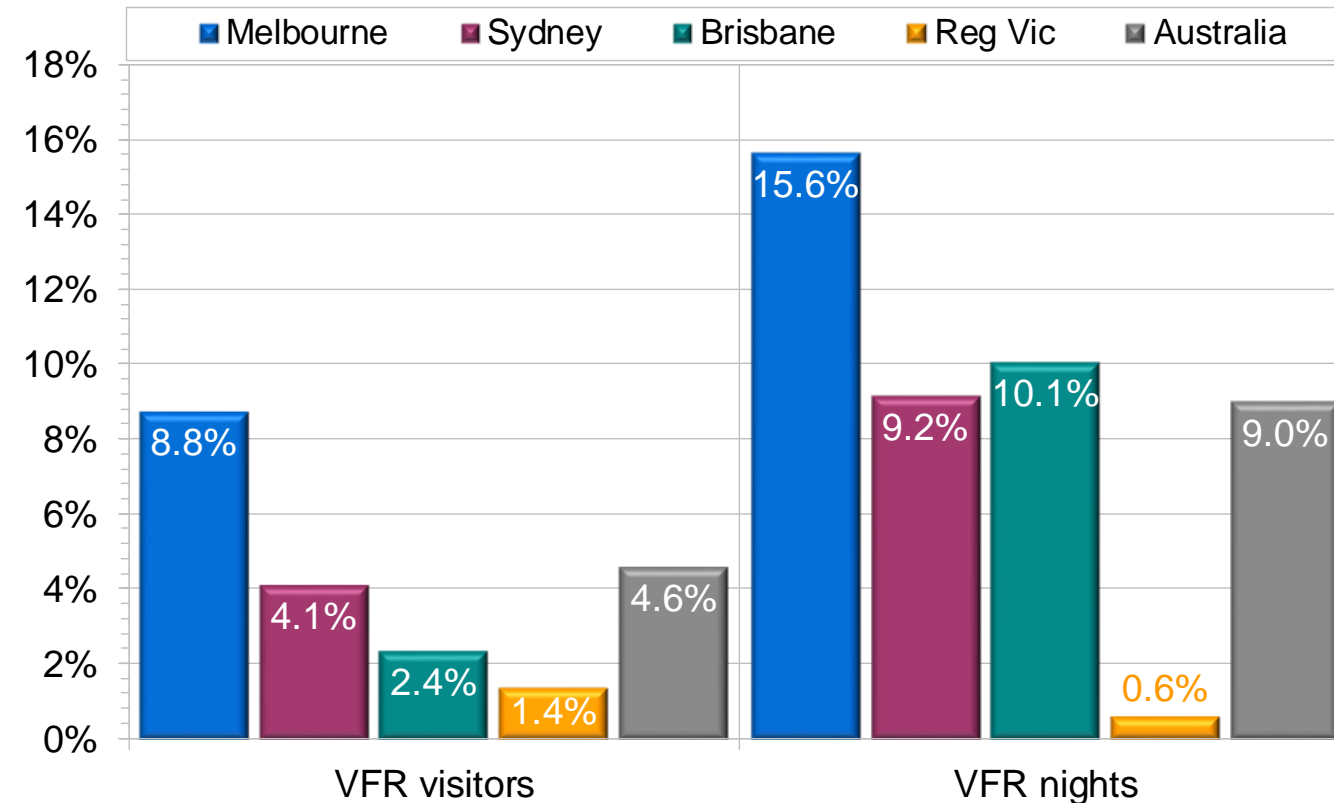
# International overnight travel to Melbourne



### In the YE Dec 12

- Melbourne received 517,700 international overnight VFR **visitors** - up by 13.6% on the YE Dec 11 and by 39.9% on the YE Dec 08.
- The region received over 1.2 million non-VFR visitors - up by 1.9% on the YE Dec 11 and by 19.4% on the YE Dec 08.
- VFR visitors spent over 11.1 million **nights** in Melbourne - up by 19.6% on the YE Dec 11 and by 78.9% on the YE Dec 08.
- Non-VFR visitors spent over 29.1 million nights in the region - down by 0.5% on the YE Dec 11, but up by 27.5% on the YE Dec 08.

# Average annual growth of international VFR travel - by Selected destinations



## YE Dec 08 to YE Dec 12

- Over the period, Melbourne experienced an average annual growth of 8.8% in international overnight **VFR visitors**.
- Melbourne had a higher growth than Sydney, Brisbane, regional Victoria and Australia.
- Over the period, Melbourne experienced an average annual growth of 15.6% in international **VFR nights**.
- Melbourne had a higher growth than Sydney, Brisbane, regional Victoria and Australia.

# International overnight VFR visitors to Melbourne - by Origin

Origin market / region	VFR visitors ('000)				Non-VFR visitors ('000)			
	YE Dec 11	YE Dec 12	Market share	% change on previous year	YE Dec 11	YE Dec 12	Market share	% change on previous year
New Zealand	86	100	19.4%	16.1%	158	158	12.7%	-0.1%
United Kingdom	64	63	12.2%	-1.4%	117	112	9.0%	-4.2%
China	35	42	8.1%	21.4%	217	240	19.3%	10.6%
Malaysia	33	40	7.7%	20.1%	53	58	4.7%	8.4%
USA includes Hawaii	23	30	5.8%	31.4%	95	98	7.9%	3.8%
Asia	187	225	43.4%	20.4%	576	605	48.8%	5.2%
USA & Canada	33	40	7.8%	21.9%	120	121	9.8%	0.8%
Europe incl UK	116	117	22.7%	0.9%	304	300	24.2%	-1.3%
Other Countries	33	35	6.7%	5.5%	60	56	4.5%	-6.3%
Total	456	518			1,218	1,241		

## In the YE Dec 12

- New Zealand (19.4%) was the largest individual source market of international overnight **VFR visitors** to Melbourne – up by 16.1% on YE Dec 11.
- ‘Asia’ (43.4%) was the largest source region of VFR visitors – up by 20.4% on YE Dec 11.
- China (19.3%) was the largest individual source market of **non-VFR visitors** – up by 10.6% on YE Dec 11.
- ‘Asia’ (48.8%) was the largest source region of non-VFR visitors – up by 5.2% on YE Dec 11.



# International VFR visitor nights in Melbourne

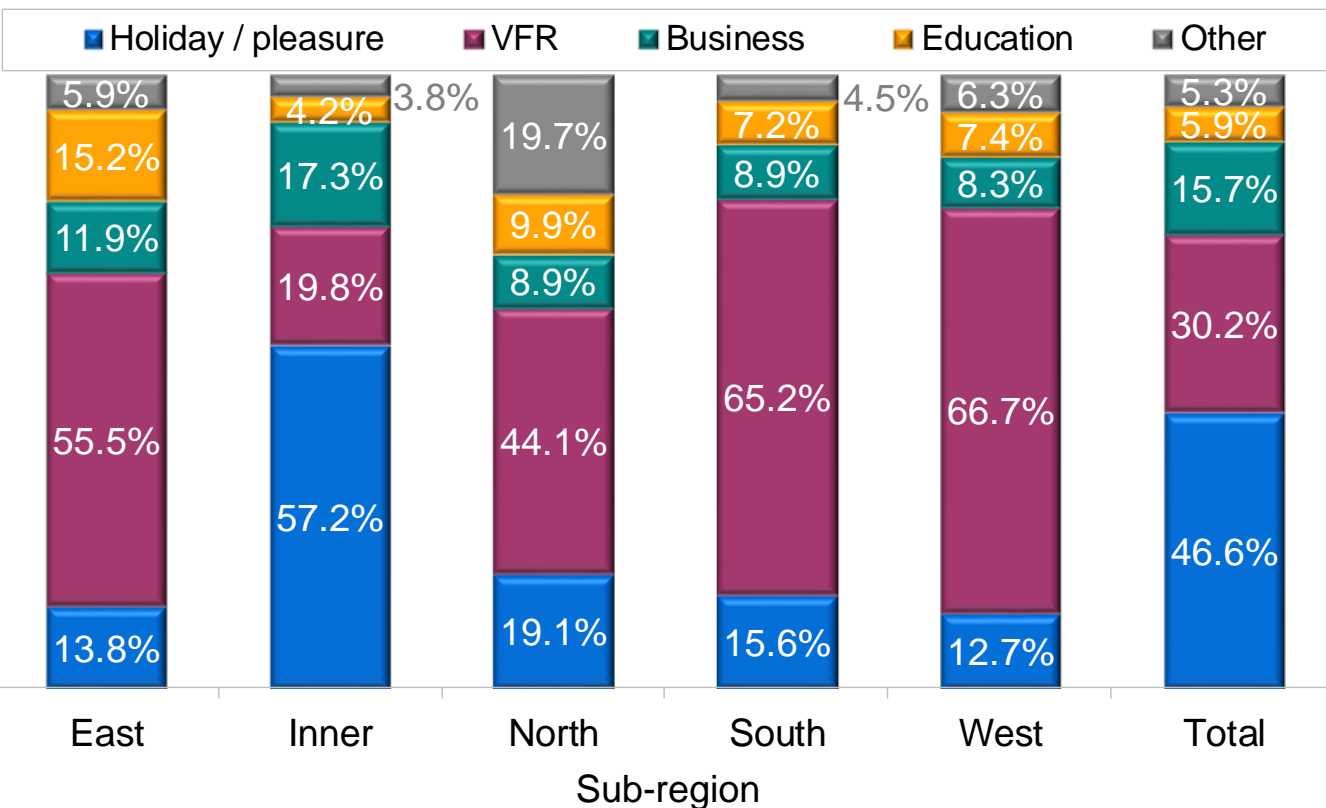
## - by Origin

Origin market / region	VFR nights ('000)				Non-VFR nights ('000)			
	YE Dec 11	YE Dec 12	Market share	% change on previous year	YE Dec 11	YE Dec 12	Market share	% change on previous year
China	1,534	1,911	17.2%	24.6%	6,316	5,881	20.2%	-6.9%
India	1,371	1,763	15.8%	28.6%	2,572	1,999	6.9%	-22.3%
United Kingdom	870	1,020	9.2%	17.3%	1,919	2,093	7.2%	9.1%
Other Asia	868	806	7.2%	-7.1%	2,117	1,882	6.5%	-11.1%
New Zealand	648	765	6.9%	18.1%	1,145	1,464	5.0%	27.8%
Asia	5,587	6,451	57.9%	15.5%	19,677	18,014	61.8%	-8.5%
USA & Canada	np	727	6.5%	np	1,560	1,495	5.1%	-4.2%
Europe incl UK	1,785	2,161	19.4%	21.1%	5,120	6,477	22.2%	26.5%
Other Countries	819	1,030	9.3%	25.9%	1,800	1,695	5.8%	-5.8%
Total	9,313	11,134			29,302	29,144		

### In the YE Dec 12

- China (17.2%) was the largest individual source market of international **VFR visitor nights** in Melbourne – up by 24.6% on YE Dec 11.
- ‘Asia’ (57.9%) was the largest source region of VFR nights – up by 15.5% on YE Dec 11.
- China (20.2%) was the largest individual source market of **non-VFR visitor nights** – down by 6.9% on YE Dec 11.
- ‘Asia’ (61.8%) was the largest source region of non-VFR nights – down by 8.5% on YE Dec 11.

# International visitors to Melbourne and sub-regions - by Purpose of visit

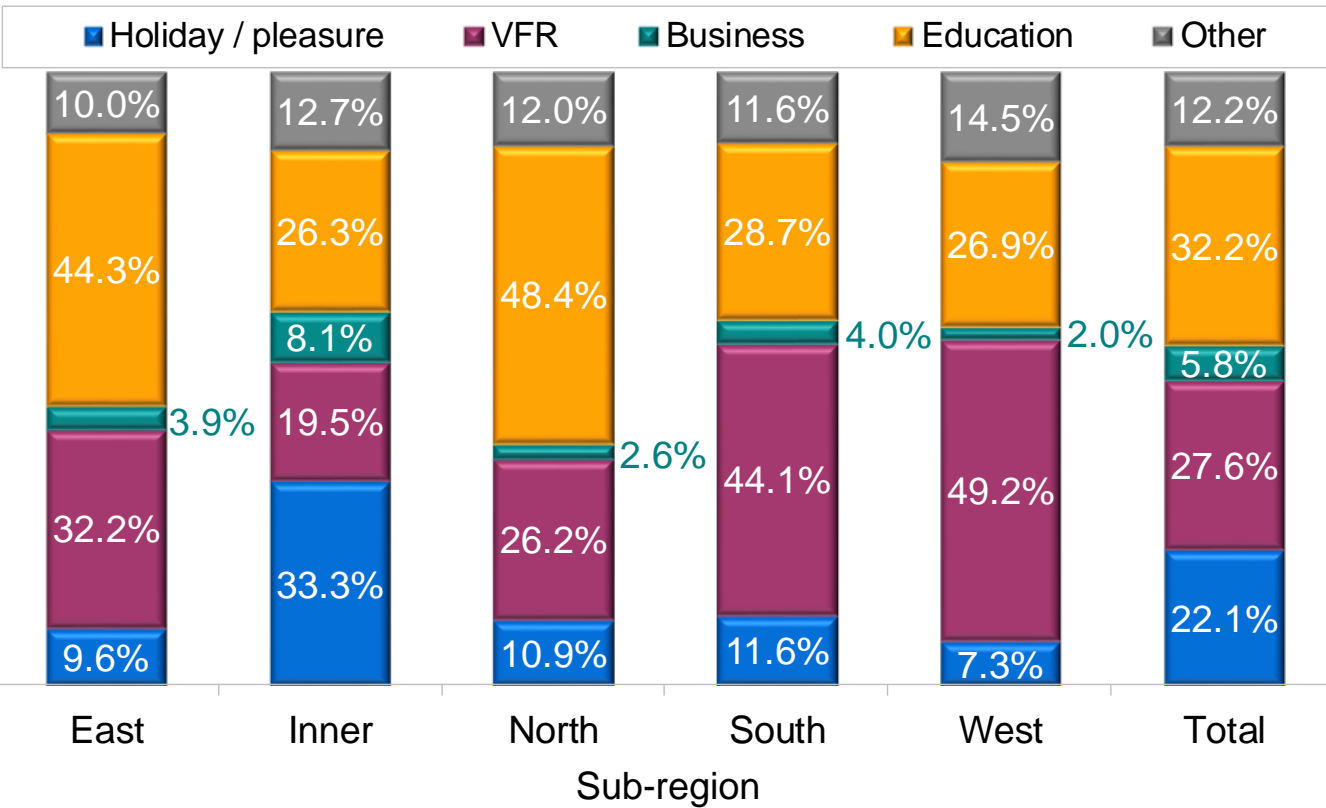


### In the YE Dec 12

- Over 3/10 (30.2%) of international overnight visitors to Melbourne travelled for the purpose of ‘visiting friends and relatives’ (VFR) – up by 2.4% pts on YE Dec 11.
- ‘West’ (66.7%) had the highest proportion of international overnight VFR visitors, followed by ‘South’ (65.2%) and ‘East’ (55.5%).
- Compared to YE Dec 11, the proportion of VFR visitors increased in ‘East’ (2.5% pts), ‘Inner’ (3.3% pts), ‘North’ (0.8% pts) and ‘West’ (0.6% pts) while it decreased in ‘South’ (2.9%) pts.

Note: Visitors may have more than one purpose for visiting Melbourne or the sub-regions.

# International visitor nights in Melbourne and sub-regions - by Purpose of visit



**In the YE Dec 12**

- Nearly 3/10 (27.6%) of international visitor nights in Melbourne were for the purpose of 'visiting friends and relatives' (VFR) – up by 3.5% pts on YE Dec 11.
- 'West' (49.2%) had the highest proportion of international VFR nights, followed by 'South' (44.1%) and 'East' (32.2%).
- Compared to YE Dec 11, the proportion of VFR nights increased in 'East' (7.6% pts), 'Inner' (4.6% pts) and 'West' (8.4% pts) while it decreased in 'North' (3.0% pts) and 'South' (2.9% pts).

# International overnight VFR visitors to Melbourne

## - detailed VFR by Sub-region

VFR Visitors												
Sub-region	Visiting friends			Visiting relatives			Visiting an international student relative or friend studying in Australia			Total VFR		
	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change
East	24.9%	23.4%	-1.5	69.9%	73.5%	3.6	np	np	np	53.0%	55.5%	2.5
Inner	39.7%	39.6%	-0.1	51.2%	52.6%	1.4	9.8%	8.3%	-1.5	16.5%	19.8%	3.3
North	23.7%	27.1%	3.4	72.8%	69.6%	-3.2	np	np	np	43.3%	44.1%	0.8
South	30.0%	23.4%	-6.6	69.3%	73.8%	4.5	np	np	np	68.1%	65.2%	-2.9
West	22.6%	25.4%	2.8	74.2%	73.7%	-0.5	np	np	np	66.1%	66.7%	0.6
Total	31.5%	32.0%	0.5	63.7%	63.8%	0.1	6.5%	5.8%	-0.7	27.8%	30.2%	2.4

### In the YE Dec 12

- Nearly 2/3 (63.8%) of international overnight VFR **visitors** to Melbourne travelled for the purpose of visiting relatives – up by 0.1% pt on YE Dec 11.
- Nearly 1/3 (32.0%) of VFR **visitors** were for visiting friends – up by 0.5% pts on YE Dec 11.
- Over 1/20 (5.8) of VFR **visitors** were visiting an international relative or friend studying in Australia – down by 0.7% pts on YE Dec 11.
- ‘Inner’ (39.6%) had the highest proportion of visiting friends **visitors** – down by 0.1% pts on YE Dec 11.
- ‘South’ (73.8%) had the highest proportion of visiting relatives **visitors** – up by 4.5% pts on YE Dec 11.
- ‘Inner’ (8.3%) had the highest proportion of **visitors** who were visiting an international relative or friend studying in Australia – down by 1.5% pts on YE Dec 11.

# International VFR visitor nights in Melbourne

## - detailed VFR by Sub-region

VFR nights												
Sub-region	Visiting friends			Visiting relatives			Visiting an international student relative or friend studying in Australia			Total VFR		
	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change
East	np	np	np	73.1%	83.4%	10.3	np	np	np	24.6%	32.2%	7.6
Inner	22.6%	25.0%	2.4	61.5%	68.1%	6.6	np	np	np	14.9%	19.5%	4.6
North	np	np	np	83.8%	78.1%	-5.7	np	np	np	29.2%	26.2%	-3.0
South	np	np	np	85.6%	87.8%	2.2	np	np	np	47.0%	44.1%	-2.9
West	np	np	np	86.9%	87.6%	0.7	np	np	np	40.8%	49.2%	8.4
Total	15.1%	17.0%	1.9	75.7%	78.6%	2.9	9.2%	np	np	24.1%	27.6%	3.5

### In the YE Dec 12

- Nearly 4/5 (78.6%) of international VFR **nights** in Melbourne were for the purpose of visiting relatives – up by 2.9% pts on YE Dec 11.
- Over 1/8 (17.0%) of VFR **nights** were for visiting friends – up by 1.9% pts on YE Dec 11.
- ‘Inner’ (25.0%) had the highest proportion of visiting friends **visitors** – up by 2.4% on YE Dec 11.
- ‘South’ (87.8%) had the highest proportion of visiting relatives **visitors** – up by 2.2% pts on YE Dec 11.

# Domestic daytrip travel

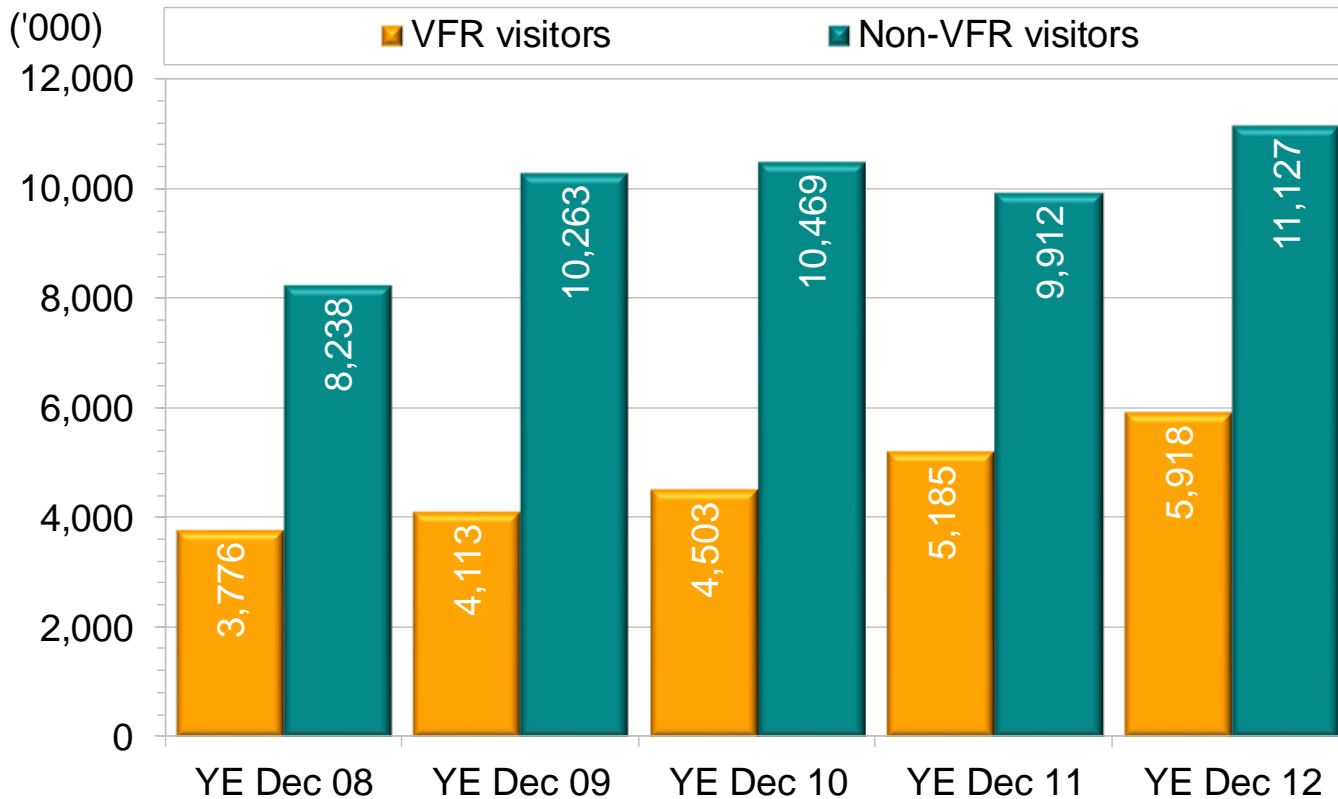
Travel by Australian residents aged 15 and over.

## PLEASE NOTE:

VFR = travelling for the (main) purpose of visiting friends and relatives.

The data used is subject to sampling variability. Users are advised to consult data confidence tables contained in publications relevant to the NVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

# Domestic daytrip travel to Melbourne

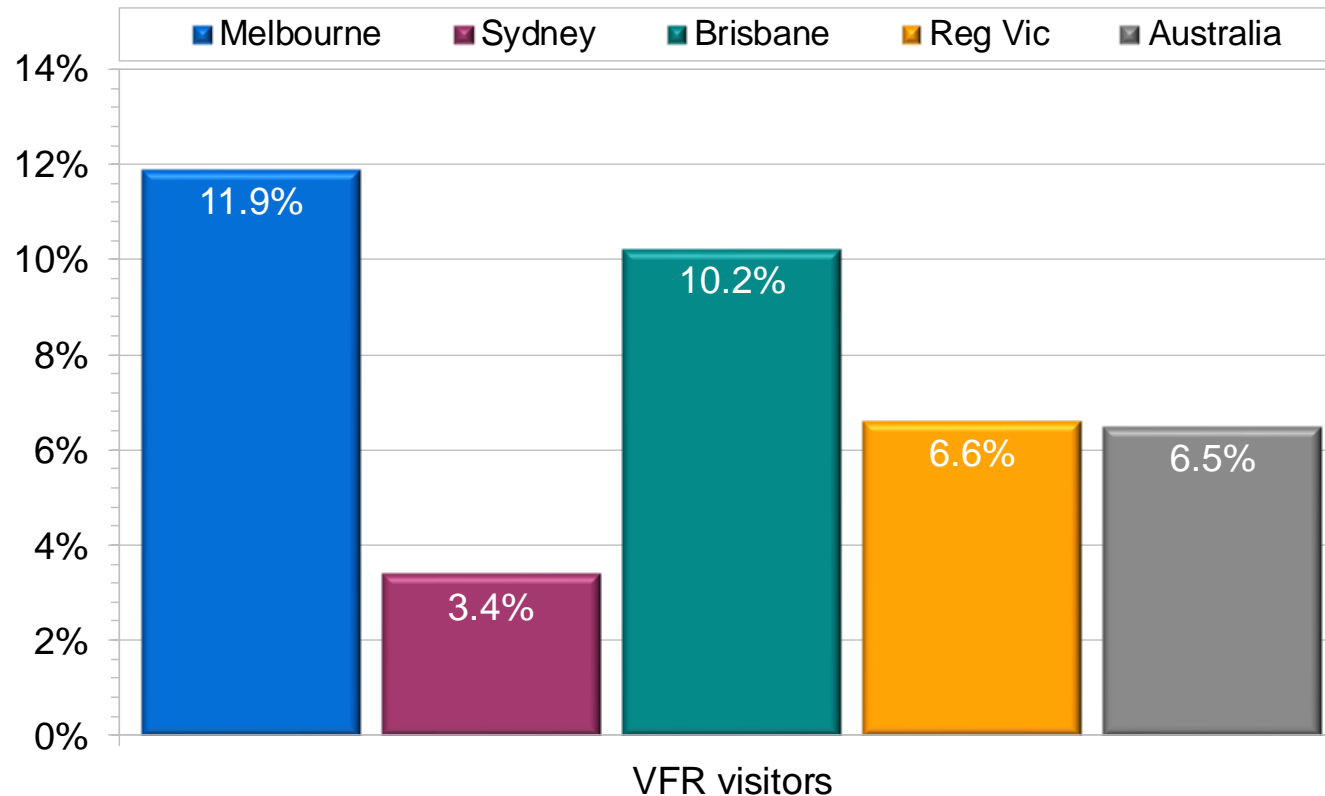


## In the YE Dec 12

- Melbourne received over 5.9 million domestic daytrip **VFR visitors** - up by 14.1% on the YE Dec 11 and by 56.7% on the YE Dec 08.

- The region received over 11.1 million **non-VFR visitors** - up by 12.3% on the YE Dec 11 and by 35.1% on the YE Dec 08.

# Average annual growth of domestic daytrip travel - by Selected destinations



## YE Dec 08 to YE Dec 12

- Over the period, Melbourne experienced an average annual growth of 11.9% in domestic daytrip **VFR visitors**.

- Melbourne had a higher growth than Sydney, Brisbane, regional Victoria and Australia.



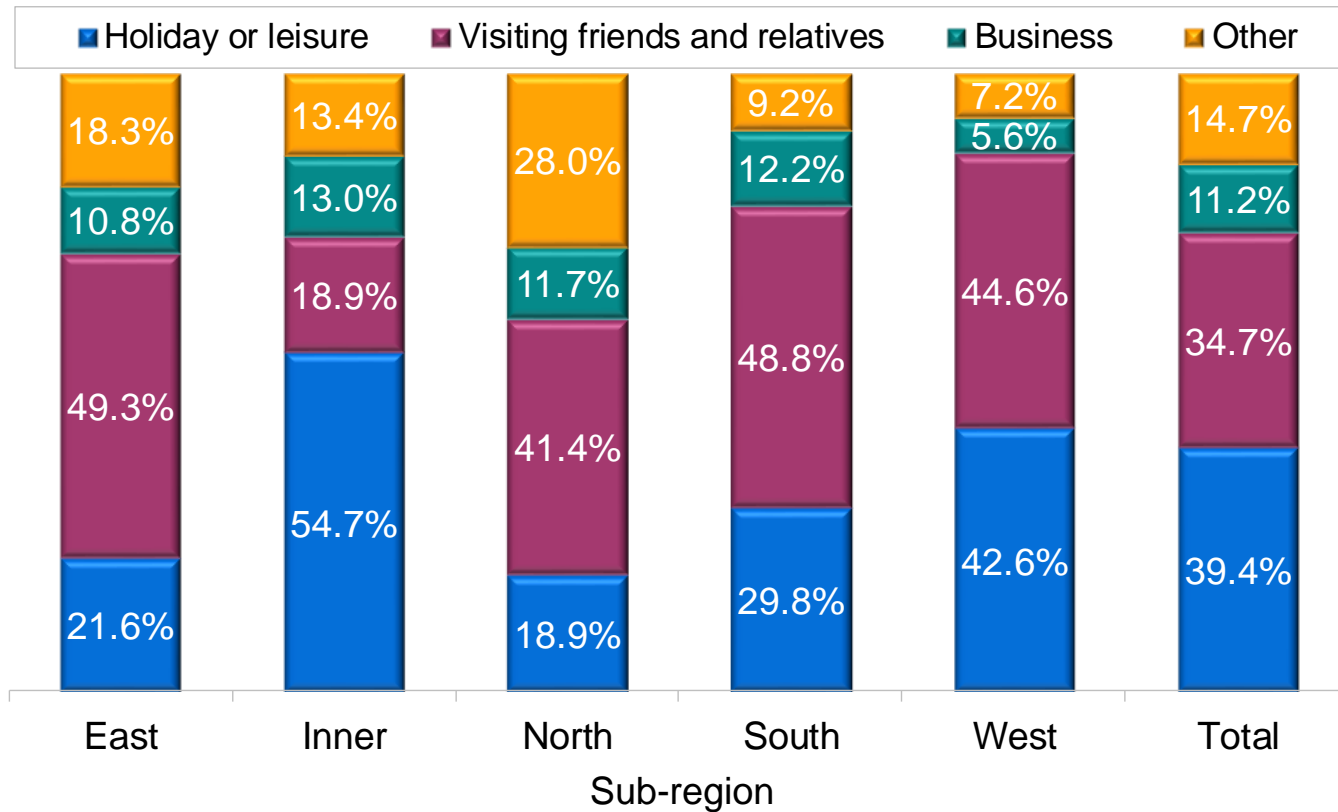
# Origin of domestic daytrip travel to Melbourne

Origin	VFR visitors ('000)				Non-VFR visitors ('000)			
	YE Dec 11	YE Dec 12	Market share	% change on previous year	YE Dec 11	YE Dec 12	Market share	% change on previous year
Melbourne	2,443	3,005	50.8%	23.0%	3,391	4,255	38.2%	25.5%
Melbourne East	382	503	8.5%	31.7%	667	1,001	9.0%	50.1%
Peninsula	534	402	6.8%	-24.7%	1,287	1,217	10.9%	-5.4%
Geelong	449	382	6.5%	-14.9%	819	718	6.5%	-12.3%
Macedon	np	253	4.3%	np	340	512	4.6%	50.6%
Gippsland	np	217	3.7%	np	642	820	7.4%	27.7%
Other regional Victoria	894	1,016	17.2%	13.6%	2,452	2,147	19.3%	-12.4%
Regional Victoria	2,614	2,773	46.9%	6.1%	6,207	6,415	57.7%	3.4%
Total Victoria	5,057	5,777	97.6%	14.2%	9,598	10,670	95.9%	11.2%
Interstate	np	np	np	np	313	457	4.1%	46.0%
Total	5,185	5,918		14.1%	9,912	11,127		12.3%

## In the YE Dec 12

- Over ½ (50.8%) of domestic daytrips **VFR visitors** to Melbourne came from within the region – up by 23.0% on YE Dec 11.
- Melbourne East (8.5%) was the 2<sup>nd</sup> largest source market of VFR visitors – up by 31.7% on YE Dec 11.
- Nearly 2/5 (38.2%) of **Non-VFR visitors** to Melbourne came from within the region – up by 25.5% on YE Dec 11.
- The Peninsula (10.9%) was the 2<sup>nd</sup> largest source market Non-VFR visitors – down by 5.4% on YE Dec 11.

# Domestic daytrip visitors to Melbourne and sub-regions - by Purpose of visit



## In the YE Dec 12

- Over 1/3 (34.7%) of domestic daytrip visitors to Melbourne travelled for the purpose of 'visiting friends and relatives' (VFR) – up by 0.4% pts on YE Dec 11.

- 'East' (49.3%) had the highest proportion of domestic daytrip VFR visitors, followed by 'South' (48.8%) and 'West' (44.6%).

- Compared to YE Dec 11, the proportion of VFR visitors increased in 'East' (3.4% pts) while it decreased in 'Inner' (1.1% pts), 'North' (2.3% pts), 'South' (0.4% pts) and 'West' (5.4% pts).

Note: Visitors may have more than one purpose for visiting Melbourne or the sub-regions.

# Domestic daytrip VFR travel to Melbourne

## - detailed VFR by Sub-region

VFR visitors									
	Visiting friends			Visiting relatives			Total VFR		
Sub-region	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change	YE Dec 11	YE Dec 12	% pts change
East	34.0%	29.9%	-4.1	66.0%	70.1%	4.1	45.9%	49.3%	3.4
Inner	47.8%	42.6%	-5.2	52.2%	57.4%	5.2	20.0%	18.9%	-1.1
North	28.8%	42.9%	14.1	71.2%	57.1%	-14.1	43.7%	41.4%	-2.3
South	39.4%	39.9%	0.5	60.6%	60.2%	-0.4	49.2%	48.8%	-0.4
West	32.4%	32.9%	0.5	67.6%	67.0%	-0.6	50.0%	44.6%	-5.4
Total	37.4%	37.7%	0.3	62.6%	62.3%	-0.3	34.3%	34.7%	0.4

### In the YE Dec 12

- Over 3/5 (62.3%) of VFR visitors to Melbourne travelled for the purpose of visiting relatives – down by 0.3% pts on YE Dec 11.
- Nearly 2/5 (37.7%) travelled for the purpose of visiting friends – up by 0.3% pts on YE Dec 11.
- ‘North’ (42.9%) had the highest proportion of visiting friends visitors – up by 14.1% pts on YE Dec 11.
- ‘East’ (70.1%) had the highest proportion of visiting relatives visitors – up by 4.1% pts on YE Dec 11.

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Notes etc

# Notes (1 of 2)

## ○ Definitions -

- Domestic overnight trip = a trip involving a stay away from home for at least one night (but for no more than 12 months), at a place (in Australia) at least 40km from home.
- Domestic overnight visitor = an Australian resident, aged 15 and over, who had taken a domestic overnight trip.
- International overnight visitor = an international resident, aged 15 and over, who visited Australia (for a period of no more than 12 months) and stayed at least one night in the 'destination'.
- Domestic daytrip = a round trip for a distance of at least 50km, of a duration of at least 4 hours but not involving a night away from home (same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home).
- Domestic daytrip visitor = an Australian resident, aged 15 and over, who had taken a domestic daytrip.
- VFR = travel for the purpose of *visiting friends and relatives*.
- Non-VFR = travel for all purposes other than VFR (excluding any travel where purpose was not stated).
- Sydney = the tourism region 'Sydney' (*TRA regional classification*).
- Brisbane = the tourism region 'Brisbane' (*TRA regional classification*).
- Regional Victoria = all tourism regions in Victoria other than 'Melbourne' (*TRA regional classification*).
- Greater Melbourne = the tourism region 'Melbourne' (*TRA regional classification*).
- Melbourne = the tourism region 'Melbourne' (*TRA regional classification*).
- Melbourne's sub-regions = 'East', 'Inner', 'North', 'South' and 'West'.
  - 'East' = Boroondara (C); Knox (C); Manningham (C); Maroondah (C); Monash (C); and Whitehorse (C).
  - 'Inner' = Melbourne (C); Port Phillip (C); Stonnington (C); and Yarra (C).
  - 'North' = Banyule (C); Darebin (C); Hume (C); Moreland (C); and Whittlesea (C).
  - 'South' = Bayside (C); Casey (C); Glen Eira (C); Greater Dandenong (C); and Kingston (C).
  - 'West' = Brimbank (C); Hobsons Bay (C); Maribyrnong (C); Melton (S); Moonee Valley (C); and Wyndham (C).

# Notes (2 of 2)

- **Data quality, sampling variability and data confidence intervals -**

- As overnight visitors may have more than one reason for visiting, the variable 'all destination purpose of visit' has been used to give the best possible estimate of all VFR travel. This may lead to some minor double counting of visitors.
- The IVS and NVS are sample surveys. The results are subject to sampling variability, and therefore may differ from figures that would have been obtained if a census had been used.

- **Disclaimer:**

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The IVS and NVS are sample surveys. As with all sample surveys, the results are subject to sampling variability, and therefore may differ from figures that would have been obtained if a census had been used. Users of the data are advised to consult data confidence tables contained in publications relevant to each survey or otherwise available from those organisations administering or managing the surveys before drawing any conclusions or inferences, or taking any action, based on the data.

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