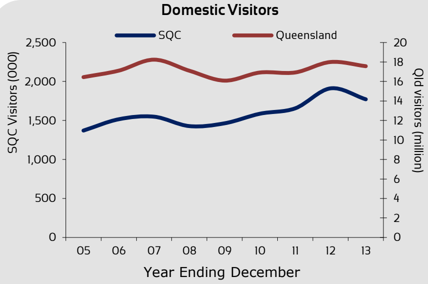
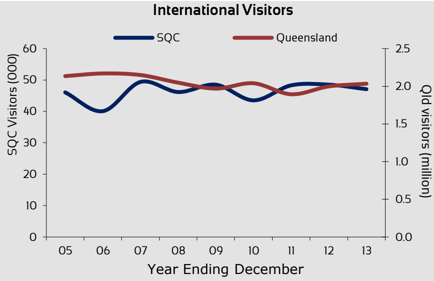
Sthrn Qld Country Regional Snapshot

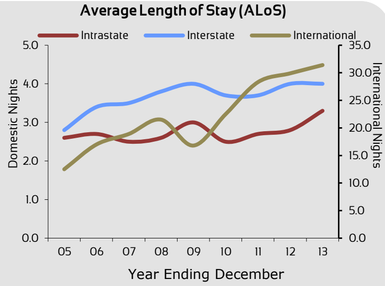
Tourism and Events Queensland

Year Ending December 2013

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	1,772,000	532,000	637,000	490,000	$643.8m
Annual % change[1]	▼ -7.3%	▲ 1.7%	▼ -19.5%	▲ 10.9%	▼ -3.3%
Trend % change[2]	▲ 3.6%	▼ -4.3%	● 0.5%	▲ 20.8%	▲ 11.9%
International Overnight	47,000	18,000	13,000	n/p	$63.3m
Annual % change	▼ -2.9%	▼ -9.7%	▼ -12.3%	▲ n/p	▲ 20.4%
Trend % change	▲ 2.5%	▼ -7.6%	▲ 1.3%	▲ n/p	▲ n/p
TOTAL	**1,819,000**	**550,000**	**650,000**	**n/p**	**$707.1m**
Annual change	▼ -7.2%	▲ 1.3%	▼ -19.3%	n/p	▼ -1.6%







▪ Southern Queensland Country recorded a decline of 7.3% in domestic visitors for the year ended December 2013, the result of a fall in travellers who were visiting friends and relatives (VFR) in the region.

▪ The number of domestic holiday visitors remained stable over the year, however VFR declined 19.5%. Despite this, VFR remained the largest sector with a 35.9% share of all visitors. The impact of the resource sector continued to increase business visitation with 10.9% growth over the year. This growth was driven by interstate business visitors, mostly from Melbourne.

▪ There was a decline in total intrastate visitation of 11.4% due to a decrease in VFR travel from both the SQC region itself, as well as Brisbane. Despite these falls, holiday visitors from both regions remained stable, which was a reflection of overall intrastate holiday travel to SQC.

▪ Interstate visitors to the region increased 12.9%. This was the result of an increase in business visitors mentioned above as well as a slight increase in interstate holiday visitors.

▪ The number of international visitors to Southern Queensland Country declined 2.9% over the year ended December 2013.

▪ International holiday visitors declined 9.7%, with VFR and business also decreasing. These declines were largely offset by an 85.3% increase in employment visitors, which lifted this sector to 18.9% of all international visitors to the region. This number of employment visitors is related to the heightened activity within the Coal Seam Gas sector.

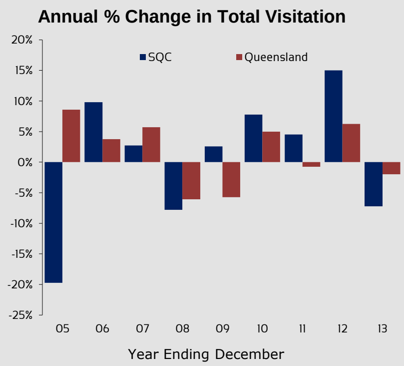
▪ The majority of these employment visitors came from New Zealand, with the total number of New Zealand visitors increasing 17.3% over the year. This was opposite to the state result which saw a decline in travel from New Zealand.

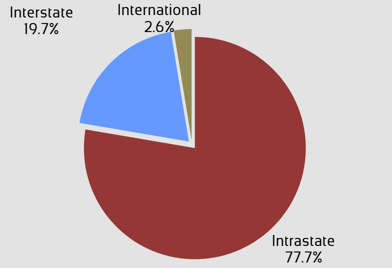
▪ Travel from the UK also went against the State trend, with a 12.2% decline in visitors to SQC, however international visitors from continental Europe increased 9.4%. This growth suggests that Eurozone consumer confidence is rising.

▪ Domestic visitors to SQC stayed 13.3% longer on average over the year. There was a slight increase in the average stay for holiday and VFR travellers, however the most growth was recorded by business visitors, who increased their average stay by 45.2%. This translated into an additional 59.9% in business visitor nights for the region and 7% growth in overall visitor nights.

▪ The average length of stay for international visitors increased 5.0%, though holiday and VFR travellers had a shorter stay on average. Growth in international employment visitors had a significant impact on nights spent in the region, with employment travel offsetting declines in holiday and VFR nights.

▪ Overnight visitor expenditure to SQC decreased marginally (-1.6%) in 2013, with a strong 20.4% increase in international spend unable to offset a 3.3% decline in domestic expenditure. Domestic expenditure accounts for 91% of total spend in the region.





There were 1,819,000 international and domestic overnight visitors to SQC in the year ended December 2013, this was a decrease of 7.2% on the year ended December 2012.

Research Updates

To receive an email alert whenever new tourism figures are released click here

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Domestic visitation Year Ending December 2013

Domestic Visitors to SQC

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	532,000	1.7%	1,644,000	5.9%	3.1	0.1
VFR	637,000	-19.5%	1,965,000	-12.2%	3.1	0.3
Business	490,000	10.9%	2,187,000	▲	4.5	1.4
Domestic[3]	**1,772,000**	-7.3%	**6,069,000**	7.0%	**3.4**	0.4
Intrastate						
Holiday	414,000	-1.0%	1,198,000	3.0%	2.9	0.1
VFR	509,000	-23.5%	1,461,000	-15.5%	2.9	0.3
Business	423,000	5.5%	1,820,000	51.2%	4.3	1.3
Intrastate	**1,413,000**	-11.4%	**4,639,000**	5.4%	**3.3**	0.5
Interstate						
Holiday	118,000	12.4%	446,000	14.7%	3.8	0.1
VFR	128,000	1.6%	504,000	-0.8%	3.9	-0.1
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	**359,000**	12.9%	**1,431,000**	12.5%	**4.0**	0.0

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
SQC	3,424,000	-6.3%	$368.1m	-8.0%
Queensland	36,589,000	-7.9%	$4,425.7m	5.6%
Australia	**164,322,000**	**-5.5%**	**$18,275.5m**	**0.4%**

Whilst previous statistics indicated that day trips were on the rise as Australians opted for more economic travel experiences, it is now apparent that the popularity of daytripping has softened on both a State and national level. Over the same period, domestic overnight visitation in Australia has increased, suggesting that Australians are regaining confidence in terms of booking travel.

Key domestic source markets to SQC

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	565,000	-10.9%	1,672,000	3.7%
Regional Qld	848,000	-11.7%	2,966,000	6.4%
Sydney	n/p	n/p	n/p	n/p
Regional NSW	181,000	17.5%	512,000	-13.7%
Melbourne	n/p	n/p	n/p	n/p
Regional Vic	n/p	n/p	n/p	n/p

State Comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	17,572,000	-2.4%	73,846,000	-0.8%
NSW	25,705,000	3.7%	85,540,000	2.1%
Victoria	18,309,000	1.9%	55,018,000	-1.6%
Australia	**75,796,000**	**1.8%**	**282,680,000**	**0.3%**
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	7,583,000	-0.8%	35,285,000	-2.1%
NSW	10,907,000	6.3%	40,815,000	5.4%
Victoria	8,411,000	1.3%	27,576,000	2.6%
Australia	**32,977,000**	**4.0%**	**133,058,000**	**2.3%**

The number of visitor nights spent in Queensland in 2013 remained relatively stable, which was comparable to national results. In comparison, domestic nights spent in New South Wales increased 2.1%, whilst night in Victoria declined 1.6%.

Sthrn Qld Country Regional Snapshot

Tourism and Events Queensland

International visitation Year Ending December 2013

International Visitors to SQC

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	18,000	-9.7%	520,000	-12.7%	29.0	-1.0
VFR	13,000	-12.3%	254,000	-20.4%	18.8	-2.0
Business	n/p	▼	n/p	▼	n/p	▼
Total[3]	**47,000**	**-2.9%**	**1,477,000**	**1.8%**	**31.4**	**1.5**

State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,034,000	1.8%	46,048,000	3.6%
NSW	3,005,000	5.7%	72,823,000	5.6%
Victoria	1,958,000	10.3%	48,354,000	7.6%
Australia	**5,821,000**	**5.3%**	**216,158,000**	**4.2%**
Holiday Visitors	**Visitors**	**Year % Chg**	**Nights**	**Annual % Change**
Queensland	1,389,000	4.9%	19,752,000	2.5%
NSW	1,676,000	8.1%	23,351,000	11.5%
Victoria	990,000	15.2%	12,156,000	13.5%
Total	**3,086,000**	**8.0%**	**71,601,000**	**9.4%**

Top 10 international source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
NZ	13,000	17.3%	148,000	▲
UK	6,000	-12.2%	237,000	15.3%
Canada	n/p	n/p	n/p	n/p
Germany	n/p	n/p	n/p	n/p
USA	n/p	n/p	n/p	n/p
Taiwan	n/p	n/p	n/p	n/p
Japan	n/p	n/p	n/p	n/p
Hong Kong	n/p	n/p	n/p	n/p
France	n/p	n/p	n/p	n/p
Italy	n/p	n/p	n/p	n/p

These are the Top 10 source markets for this period, ranked using total visitor numbers. Some markets may have been added to create natural groups such as 'Asia' and 'Europe' to provide a more complete picture. For technical reasons, some data may not be published, however the markets will still appear in order.

Holiday	Visitors	Year % Chg	Nights	Year % Chg
NZ	n/p	n/p	n/p	n/p
UK	n/p	n/p	n/p	n/p
Germany	n/p	n/p	n/p	n/p
Canada	n/p	n/p	n/p	n/p
France	n/p	n/p	n/p	n/p
Korea	n/p	n/p	n/p	n/p
USA	n/p	n/p	n/p	n/p
Taiwan	n/p	n/p	n/p	n/p
Hong Kong	n/p	n/p	n/p	n/p
Netherlands	n/p	n/p	n/p	n/p

The Top 10 Holiday Visitor markets are similar to the Total Visitor markets above, however they are ranked using holiday visitor numbers. The same grouping and limitation of data applies.

The average length of stay of international holidaymakers in Queensland was 14.2 nights in 2013. This was longer than both New South Wales (13.9 nights) and Victoria (12.3 nights). Whilst this was a strong result, it represents a decline of 2.4% or -0.4 nights on the year prior. Increases in the average length of stay of key markets such as the United Kingdom and Continental Europe were offset by declines from Korea and New Zealand.

Regional Snapshots for all Queensland regions are available on the TEQ Research website, www.tq.com.au/research

The Toowoomba subregion includes Crows Nest - Rosalie, Jondaryan, Pittsworth, Clifton - Greenmount, Cambooya - Wyreema, Darling Heights, Drayton - Harristown, Gowrie, Highfields, Middle Ridge, Newtown, North Toowoomba - Harlaxton, Rangeville, Toowoomba, Wilsonton and Darling Downs.

The Western Downs subregion includes Balonne, Chinchilla, Millmerran, Wambo, Goondiwindi, Inglewood - Waggamba, Miles - Wandoan, Roma and Tara.

The Southern Downs subregion includes Southern Downs East, Southern Downs West, Stanthorpe, Stanthorpe Region and Warwick.

The South Burnet subregion includes Kingaroy, and Nanango.

Tourism and Events Queensland

Year Ending December 2013

Domestic Regional Comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
							% Proportion of Travel Purpose			
Brisbane	5,146,000	3.1%	15,709,000	3.3%	3.1	0.1	29%	43%	22%	29%
Gold Coast	3,490,000	-0.9%	14,186,000	1.0%	4.1	0.1	60%	28%	10%	20%
Sunshine Coast	2,610,000	-7.0%	10,037,000	-9.1%	3.8	-0.1	60%	31%	5%	15%
Fraser Coast	524,000	-17.1%	1,892,000	-12.1%	3.6	0.2	44%	39%	10%	3%
Southern Qld Country	**1,772,000**	**-7.3%**	**6,069,000**	**7.0%**	**3.4**	**0.4**	**30%**	**36%**	**28%**	**10%**
Southern GBR	1,570,000	-14.0%	6,066,000	-12.4%	3.9	0.1	32%	36%	26%	9%
Mackay	649,000	-12.9%	2,410,000	3.2%	3.7	0.6	24%	29%	43%	4%
Whitsundays	505,000	5.2%	2,014,000	-7.1%	4.0	-0.5	62%	23%	9%	3%
Townsville	967,000	10.1%	3,975,000	11.5%	4.1	0.0	33%	40%	19%	6%
Outback	361,000	n/p	1,871,000	n/p	5.2	n/p	34%	18%	36%	2%
TNQ	1,594,000	6.0%	8,420,000	11.3%	5.3	0.3	59%	22%	17%	9%
Total Domestic	**17,572,000**	**-2.4%**	**73,846,000**	**-0.8%**	**4.2**	**0.1**	**43%**	**35%**	**18%**	**-**

International Regional Comparison

Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
							% Proportion of Travel Purpose			
Brisbane	974,000	2.4%	21,174,000	12.0%	21.7	1.8	51%	29%	11%	48%
Gold Coast	792,000	6.8%	7,595,000	-1.1%	9.6	-0.8	79%	15%	4%	39%
Sunshine Coast	219,000	-5.1%	2,237,000	-11.4%	10.2	-0.8	78%	19%	3%	11%
Fraser Coast	120,000	4.6%	653,000	29.1%	5.4	1.0	93%	6%	1%	6%
Southern Qld Country	**47,000**	**-2.9%**	**1,477,000**	**1.8%**	**31.4**	**1.5**	**38%**	**29%**	**10%**	**2%**
Southern GBR	127,000	-2.6%	2,409,000	10.2%	19.0	2.2	75%	14%	4%	6%
Mackay	43,000	-1.1%	804,000	15.6%	18.8	2.7	62%	26%	6%	2%
Whitsundays	182,000	10.4%	1,313,000	3.9%	7.2	-0.4	96%	2%	1%	9%
Townsville	101,000	-9.6%	1,442,000	-9.4%	14.3	0.0	80%	12%	3%	5%
Outback	17,000	n/p	332,000	n/p	19.9	n/p	72%	9%	10%	1%
TNQ	684,000	3.6%	6,177,000	3.2%	9.0	-0.1	92%	4%	2%	34%
Total International	**2,034,000**	**1.8%**	**46,048,000**	**3.6%**	**22.6**	**0.4**	**68%**	**24%**	**8%**	**-**

Notes/Sources:

In 2012, the ABS changed the way it reports regional statistics. Essentially, the ABS moved from using political boundaries such as local government areas to a framework based on population densities, called the ASGS (Australian Statistical Geographic Standard). SA2's (Statistical Area 2) which represent one level of the ASGS replace local government areas (LGA) previously used to define tourism region boundaries. SA2 boundaries closely resemble that of the former tourism region boundaries (defined by LGA boundaries) in Queensland with any differences not being material.

The data included in this report is sourced from the National and International Visitor surveys conducted by Tourism Research Australia. These are large and comprehensive surveys that provide valuable data on a national, state, and regional level. The variable nature of travel, combined with sampling variability (which all surveys are subject to) means that regional results need to be viewed as indicative only. It is likely that not all segments of the region will experience the changes noted on a regional level.

Two letter IATA Country Codes have been used to keep data entry concise. A list of those used appears below.
CN - China; DE - Germany; JN - Japan; UK - United Kingdom; EU - Europe

'n/p' indicates the data has not been published.

Footnotes:

1. Annual change refers to the percentage change between the year to the date covered by this report compared to the same period one year prior.
2. Trend change refers to the percentage change between the average of the three years to the date covered by this report, compared to the average for the same period one year prior.
3. This figure includes "Other" visitors.