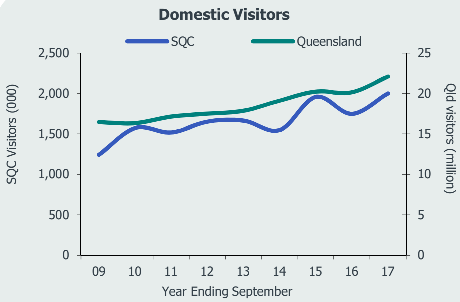
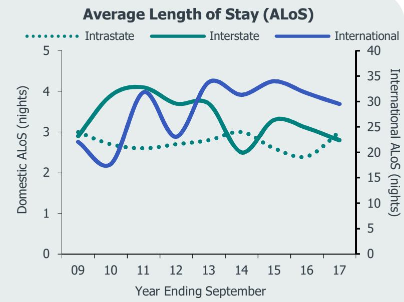
Southern Queensland Country Regional Snapshot

Year Ending September 2017

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	**2,002,000**	**577,000**	**766,000**	**500,000**	**$746.1m**
Annual % change[1]	▲ 14.5%	▲ 11.9%	▲ 7.9%	▲ 31.0%	▲ 24.1%
3yr trend % change[2]	▲ 8.6%	▲ 7.7%	▲ 5.8%	▲ 18.1%	▲ 11.6%
International Overnight	**46,000**	**21,000**	**17,000**	**n/p**	**$61.3m**
3yr trend % change	▲ 2.4%	▲ 11.3%	▲ 8.1%	n/p	▼ -3.1%
TOTAL	**2,049,000**	**598,000**	**783,000**	**n/p**	**$807.4m**
Annual % change	▲ 14.5%	▲ 12.3%	▲ 8.2%	n/p	▲ 23.0%
3yr trend % change	▲ 8.5%	▲ 7.8%	▲ 5.8%	n/p	▲ 10.2%





Domestic Visitors

▪ The Southern Queensland Country region (SQC) welcomed a record 2.0m domestic overnight visitors in the year ending September 2017, up by 14.5% year on year. The domestic market accounted for the majority of SQC's overnight visitation (98%) and expenditure (92%).

▪ All key purposes of travel saw visitation growth, i.e. holiday, visiting friends and relatives (VFR) and business, with business growth particularly strong. Business grew by 31.0%, holiday by 11.9%, and VFR by 7.9%.

▪ Interstate visitors made a strong contribution to growth, up by 40.9% to 406,000 in the year ending September 2017. This came as interstate holiday and business travel recorded strong growth. The region also saw 49.4% growth from NSW, the region's largest source market at 261,000 visitors.

▪ Intrastate visitation also grew, up by 9.3% to 1.6 million, and continues to account for a large share (80%) of domestic visitors. Intrastate visitation grew among all key purposes of travel, with Brisbane remaining the largest source market and recording growth of 18.8% to 758,000 visitors.

▪ The average length of stay (ALoS) grew by 0.5 nights to 3.0 nights which propelled total visitor nights up by 33.4% to a record 5.9m.

▪ The strong growth in visitation and visitor nights drove expenditure 24.1% higher to $746.1m.

International Visitors

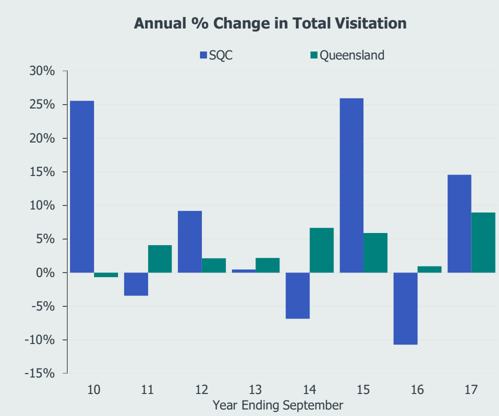
▪ International visitation to SQC grew by 2.4% to 46,000 in the three years ending September 2017, contributing 2% of overnight visitation and 8% of overnight expenditure in the region.

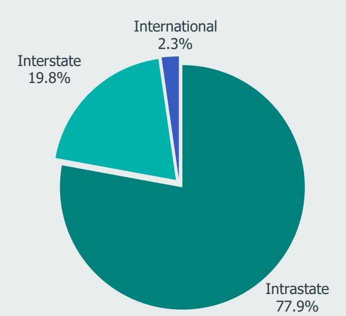
▪ Holiday and VFR are the main purposes of international travel to the region, accounting for 46% and 36% of visitors respectively. Both sectors contributed to the overall three-year trend growth, with holiday up by 11.3% to 21,000 and VFR up by 8.1% to 17,000.

▪ European markets (including the UK) contributed 14,000 visitors to the region, while Asian countries contributed 11,000. The three-year trend shows European visitation declined by 5.5% while Asian visitation grew by 8.4%.

▪ Visitors' average length of stay (ALoS) declined slightly (by 1.9%) to 29.5 nights which resulted in visitor nights remaining stable at 1.4m (+0.3%) despite the growth in visitation.

▪ International expenditure softened by 3.1% to $61.3m in the three years ending September 2017.





Research Updates

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

Domestic visitation Year Ending September 2017

Domestic Visitors to SQC

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	577,000	11.9%	1,478,000	25.3%	2.6	0.3
VFR	766,000	7.9%	2,365,000	24.3%	3.1	0.4
Business	500,000	31.0%	1,639,000	72.6%	3.3	0.8
Domestic[3]	**2,002,000**	14.5%	**5,910,000**	33.4%	**3.0**	0.5
Intrastate						
Holiday	447,000	2.2%	1,056,000	5.1%	2.4	0.1
VFR	648,000	9.5%	1,982,000	41.9%	3.1	0.7
Business	406,000	24.6%	1,450,000	78.4%	3.6	1.1
Intrastate	**1,596,000**	9.3%	**4,761,000**	34.4%	**3.0**	0.6
Interstate						
Holiday	130,000	66.4%	422,000	141.6%	3.2	1.0
VFR	118,000	-0.1%	383,000	-24.3%	3.3	-1.0
Business	95,000	67.7%	189,000	38.5%	2.0	-0.4
Interstate	**406,000**	40.9%	**1,149,000**	29.5%	**2.8**	-0.3

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
SQC	3,374,000	-9.5%	$459.7m	2.2%
Queensland	41,295,000	1.0%	$4,363.8m	1.2%
Australia	**191,961,000**	**1.9%**	**$20,420.1m**	**6.3%**

Key domestic source markets to SQC

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	758,000	18.8%	1,893,000	12.8%
Regional Qld	838,000	1.9%	2,868,000	53.9%
Sydney	84,000	57.7%	197,000	-6.1%
Regional NSW	177,000	45.8%	525,000	75.4%
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	22,110,000	9.7%	85,982,000	8.3%
NSW	31,030,000	7.6%	99,591,000	7.1%
Victoria	23,750,000	10.6%	68,407,000	8.7%
Australia	**95,976,000**	**7.2%**	**347,274,000**	**5.9%**

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,397,000	1.6%	37,052,000	0.5%
NSW	12,229,000	3.4%	41,941,000	-0.3%
Victoria	10,146,000	5.5%	30,609,000	3.8%
Australia	**38,284,000**	**3.3%**	**145,635,000**	**0.6%**

International visitation Year Ending September 2017

International Visitors to SQC

All Visitors	Visitors	Trend Chg %	Nights	Trend Chg %	Length of Stay	Year # Chg
Holiday	21,000	11.3%	575,000	1.0%	27.2	-6.8
VFR	17,000	8.1%	297,000	10.6%	17.6	4.9
Business	n/p	n/p	n/p	n/p	n/p	n/p
Total[3]	**46,000**	**2.4%**	**1,372,000**	**0.3%**	**29.5**	**-2.1**

State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,628,000	3.0%	53,596,000	1.0%
NSW	4,095,000	8.9%	94,938,000	9.0%
Victoria	2,815,000	7.0%	66,860,000	11.6%
Australia	**7,871,000**	**7.1%**	**267,014,000**	**6.6%**

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,831,000	2.9%	23,084,000	1.6%
NSW	2,399,000	8.1%	28,170,000	5.6%
Victoria	1,537,000	5.4%	17,305,000	16.7%
Total	**4,421,000**	**6.7%**	**84,298,000**	**4.8%**

Top source markets

Total	Visitors	Trend Chg %	Nights	Trend Chg %
Europe and UK	14,000	-5.5%	336,000	-16.0%
Asia	11,000	8.4%	688,000	13.0%
New Zealand	n/p	n/p	n/p	n/p
North America	n/p	n/p	n/p	n/p

Markets have been combined to create natural groups such as 'Asia' and 'North America' to increase sample sizes. For technical reasons, some data may not be publishable (n/p), however the markets will still appear in order.

Top holiday source markets

Holiday	Visitors	Trend Chg %	Nights	Trend Chg %
Europe and UK	8,000	1.4%	179,000	-9.2%
Asia	n/p	n/p	n/p	n/p
New Zealand	n/p	n/p	n/p	n/p
North America	n/p	n/p	n/p	n/p

Regional snapshots for all Queensland regions are available on the TEQ website. Overview snapshots are also available for both Domestic and International visitors. www.teq.queensland.com.

Southern Queensland Country (SQC) includes the Toowomba, Western Downs, Southern Downs and South Burnett subregions.

The tourism regions are defined by the Australian Bureau of Statistics (ABS) as a collection of Statistical Area Level 2s (SA2), please refer to the interactive map at http://stat.abs.gov.au/itt/r.jsp?ABSMaps

Year Ending September 2017

Domestic Regional Comparison

							% Proportion of Travel Purpose			
Total Visitors	**Visitors**	**Year % Chg**	**Nights**	**Year % Chg**	**Length of stay**	**Nights change**	**Holiday %**	**VFR %**	**Business %**	**% Share of Total Visitors**
Brisbane	6,711,000	15.4%	19,812,000	14.6%	3.0	0.0	25%	40%	26%	30%
Gold Coast	4,164,000	14.3%	14,761,000	9.8%	3.5	-0.2	53%	32%	12%	19%
Sunshine Coast	3,431,000	2.6%	12,283,000	1.5%	3.6	0.0	53%	35%	8%	16%
Fraser Coast*	595,000	1.1%	2,957,000	9.3%	5.0	n/p	49%	34%	13%	3%
Southern Qld Country	**2,002,000**	**14.5%**	**5,910,000**	**33.4%**	**3.0**	**0.5**	**29%**	**38%**	**25%**	**9%**
SGBR	1,997,000	3.5%	7,172,000	-5.3%	3.6	-0.3	34%	30%	26%	9%
Mackay*	908,000	8.4%	3,506,000	11.2%	3.9	n/p	17%	21%	53%	4%
Whitsundays*	472,000	-2.1%	2,303,000	3.1%	4.9	n/p	53%	17%	27%	2%
Townsville	1,045,000	-10.2%	3,434,000	-19.9%	3.3	-0.4	33%	24%	31%	5%
Outback*	859,000	9.5%	3,538,000	4.8%	4.1	n/p	28%	18%	45%	4%
TNQ	1,775,000	-2.8%	8,928,000	-2.4%	5.0	0.0	51%	21%	22%	8%
Total Domestic	**22,110,000**	**9.7%**	**85,982,000**	**8.3%**	**3.9**	**0.0**	**38%**	**34%**	**23%**	**-**

** Three year trend change %*[2]

International Regional Comparison

							% Proportion of Travel Purpose			
Total Visitors	**Visitors**	**Annual % change**	**Nights**	**Annual % change**	**Length of stay**	**Nights change**	**Holiday %**	**VFR %**	**Business %**	**% Share of Total Visitors**
Brisbane	1,237,000	4.6%	25,731,000	4.0%	20.8	-0.1	54%	29%	9%	47%
Gold Coast	1,056,000	4.2%	9,760,000	-9.0%	9.2	-1.3	80%	15%	3%	40%
Sunshine Coast	294,000	8.2%	3,151,000	5.6%	10.7	-0.3	78%	18%	3%	11%
Fraser Coast	151,000	10.7%	736,000	12.0%	4.9	0.1	94%	6%	0%	6%
Southern Qld Country*	**46,000**	**2.4%**	**1,372,000**	**0.3%**	**29.5**	**n/p**	**46%**	**36%**	**9%**	**2%**
SGBR	157,000	18.3%	2,711,000	22.7%	17.3	0.6	76%	12%	7%	6%
Mackay*	50,000	3.5%	457,000	-13.8%	9.2	n/p	74%	17%	4%	2%
Whitsundays	247,000	8.2%	1,292,000	-14.6%	5.2	-1.4	96%	2%	1%	9%
Townsville	138,000	10.5%	1,367,000	-15.8%	9.9	-3.1	82%	11%	3%	5%
Outback*	27,000	-2.9%	576,000	-4.2%	21.3	n/p	72%	14%	6%	1%
TNQ	890,000	1.5%	6,433,000	-2.7%	7.2	-0.3	93%	4%	2%	34%
Total International	**2,628,000**	**3.0%**	**53,596,000**	**1.0%**	**20.4**	**-0.4**	**70%**	**24%**	**7%**	**-**

Notes/Sources:

In 2012, the Australian Bureau of Statistics (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 (NVS & IVS) conducted by Tourism Research Australia (TRA). 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.

In 2014 TRA moved to a new methodology for the NVS that included mobile phone interviewing as part of a dual frame overlap survey. This initiative was part of TRA's continuous improvement program. The inclusion of mobile phone users ultimately delivers greater domestic tourism data accuracy as it better reflects the Australian resident population and phone ownership.

The 2014 and 2015 NVS data, including the data for the year ending June 2016, has been back-cast by TRA.

Please visit tra.gov.au for more information on the methodology, back-casting process and impact on results.

'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. Trend change has been used to analyse changes for regions with small sample sizes.
3. This figure includes "Other" visitors.