

Year ending March 2014

Domestic Visitors to Australia

	Visitors	Annual change ¹	Avg Stay ²	Annual change
Total	77,573,000	▲ 4.0%	3.7	▼ -2.6%
Holiday	32,993,000	2.2%	4.0	-2.4%
VFR ³	27,304,000	4.1%	3.4	0.0%
Business	14,710,000	6.3%	3.1	-6.1%

	Visitors	Annual change ¹	Avg Stay ²	Annual change
Intrastate	54,123,000	▲ 4.7%	3.1	● 0.0%
Holiday	24,375,000	2.7%	3.3	0.0%
VFR	19,037,000	4.4%	2.6	0.0%
Business	8,070,000	9.7%	3.1	-3.1%

	Visitors	Annual change ¹	Avg Stay ²	Annual change
Interstate	24,845,000	▲ 1.9%	4.9	▼ -3.9%
Holiday	9,263,000	0.4%	5.5	-6.8%
VFR	8,607,000	3.3%	5.0	-2.0%
Business	6,760,000	2.2%	3.1	-6.1%

Expenditure in Australia

Australia	\$ million	Annual change
Total ⁴	\$52,343.8m	▲ 4.0%
Holiday ⁵	\$22,729.5m	2.8%
VFR ⁵	\$8,994.1m	5.9%
Business ⁵	\$8,257.6m	4.3%

Hanging Out at Home

Australians continued to keep overnight travel close to home, despite the continued strong growth in outbound travel. The 4% increase in domestic visitors was driven by a 6.3% increase in business travel. Those visiting friends and family (VFR) also showed good growth at 4.1% and holiday visitors grew 2.2% nationally. Holiday makers accounted for 42.5% of all domestic travel within Australia over the year.

Australians continued their shift toward holidaying closer to home. Intrastate travel dominated domestic tourism growth with 4.7% or an additional 2.4 million visits. Interstate travel remained subdued with 1.9% growth.

The completion of several major infrastructure projects saw a spike in the travel of contractors, thus underpinning intrastate business travel. This sector was the stand out performer with 9.7% growth over the year. This had a flow on effect in VFR travel which increased 4.4%. Intrastate holiday travel grew 2.7%.

Interstate Business

Interstate travel remained subdued. Holiday travel was stable and interstate business travel had a more modest 2.2% increase.

Victoria and Western Australia were the exception to the rule with 8.4% and 9.9% growth in interstate travel respectively. Victoria's interstate travel was driven by holiday visitors while the Western Australian growth was driven by business and VFR travel.

Nights Out

There was a very slight increase of 1.2% in visitor nights nationally, however as this was lower than visitor growth, the flow on effect was a lower average length of stay. Intrastate visitor nights increased 4.1% however interstate visitors shortened their average length of stay with 2.5% fewer visitor nights nationally during the year. There was a fall of 1.3% in holiday visitor nights driven by a 5.9% decrease in interstate holiday visitor nights, further highlighting the tendency to stay closer to home.

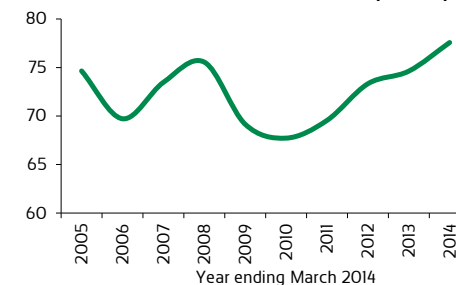
The Day Trip Slip Blip

Despite the increase in overnight intrastate travel, day trips continued their recent decline with a 3.6% fall nationally. There was 6% decline in holiday related day trips which may indicate a switch to intrastate single overnight stays. The day trip decline was an east coast phenomena with falls in overall day trips in Queensland, New South Wales and Victoria, driven by a decline in holiday day trips in all three states.

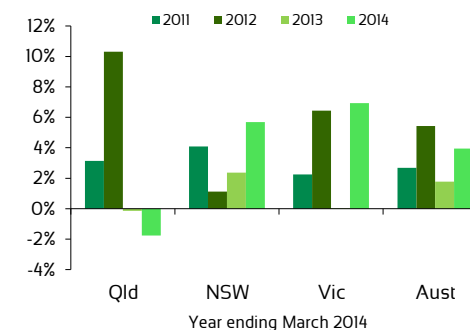
Spending More

Growth in the number of intrastate visitors who increased their average length of stay combined to deliver a 4% increase in domestic travel expenditure. New South Wales contributed the strongest expenditure growth with 10% followed by Victoria with 4.4%. Nationally, VFR had the strongest growth in expenditure at 5.9%, followed by business travel at 4.3% and holiday visitor expenditure grew 2.8%.

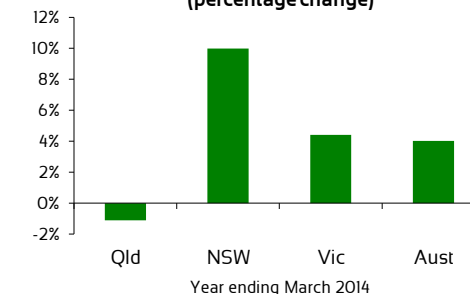
Domestic visitors within Australia (million)



State comparison - domestic visitors (percentage change)



State comparison - expenditure (percentage change)



Year ending March 2014

Domestic Visitors to Queensland

	Visitors	Annual Change ¹	Avg Stay	Annual change
Total	17,725,000	▼ -1.8%	4.2	● 0.0%
Holiday	7,547,000	-4.7%	4.6	-2.1%
VFR	6,236,000	1.1%	3.8	2.7%
Business	3,323,000	3.3%	3.7	8.8%

Intrastate	12,403,000	▼ -0.8%	3.4	▲ 3.0%
Holiday	5,195,000	-4.0%	3.5	0.0%
VFR	4,385,000	1.9%	3.0	0.0%
Business	2,210,000	4.2%	3.8	11.8%

Interstate	5,322,000	▼ -4.0%	5.9	▼ -3.3%
Holiday	2,352,000	-6.0%	6.8	-8.1%
VFR	1,851,000	-0.9%	5.6	5.7%
Business	1,113,000	1.5%	3.3	0.0%

Expenditure in Queensland

Queensland	\$ million	Annual change
Total ⁴	\$13,575.5m	▼ -1.1%
Holiday ⁵	\$6,379.9m	-2.9%
VFR ⁵	\$2,325.9m	4.7%
Business ⁵	\$1,871.8m	1.3%

Domestic Travel Buoyed by New Year Boost

Queensland domestic overnight travel softened with a slight 1.8% decline. There was positive growth in the Whitsundays, Townsville and TNQ, however the changes in the resource sector have had a negative impact on destinations in central Queensland. Anecdotal information suggested that January was a very busy month and this was supported by the strong March quarter for the southern destinations such as the Gold Coast and Sunshine Coast.

Intraregional Travel Very Close to Home

With intrastate travel reasonably stable during the year, the influence of keeping travel close to home could be seen in intraregional travel. Though intraregional visitors make up less than 10% of domestic visitors to the Gold Coast, Sunshine Coast and Fraser Coast, for Mackay and SQC, intraregional travellers' share of domestic visitors increases to more than 20%. For TNQ and SGBR, intraregional visitors were very important, with more than a 30% share of domestic visitors.

Visitor Yield Stable in a Changing World

Though Queensland saw a slight decline in domestic visitor numbers and visitor nights, overall expenditure per visitor increased slightly. Queensland also increased the yield of domestic holiday visitors during the year. The yield for VFR also had a modest increase while the yield for business visitors declined. The strongest growth in domestic visitor expenditure was from the VFR sector, though these visitors do not typically utilise commercial accommodation.

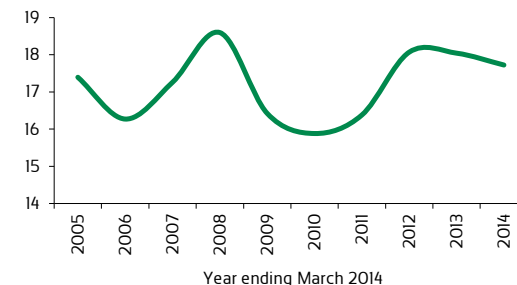
Regional Influences on Intrastate Travel

The range of regional influences that appear to be impacting on domestic travel continued during the year. Due to the duration and scale of these impacts they have been noted again. These include the continuing shift of the mining and infrastructure development in the centre of the state from construction to production; the closing stages of the construction of the Curtis Island LNG plants; the rolling impact across the south-west of the gas pipeline construction through to Curtis Island; the effect of one of the most widespread droughts on record; several cyclones in the far north; and general economic and business uncertainty. The strength and scale of the impact of each of these influences varies from highly localised through to state wide implications.

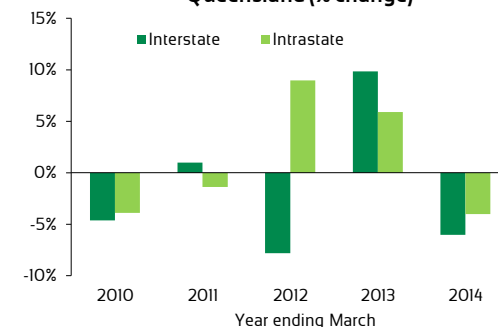
Intersecting Interstate Interludes

Visitors from interstate markets to Queensland declined 4% during the year, and interstate visitor nights declined 7.2%. New South Wales and Victoria however, increased their interstate visitation by 3.2% and 8.4% respectively. Within these increases were a significant proportion of Queensland visitors. New South Wales attracted an additional 3.6% from Queensland as a source market and Victoria increased 7.2%. Queenslanders made up 10.7% of the New South Wales domestic market and only 5.0% of the Victorian market.

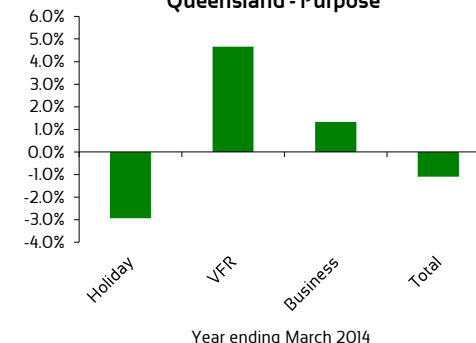
Domestic visitors to Queensland (million)



Domestic Holiday visitors to Queensland (% change)



Annual Change in expenditure in Queensland - Purpose



Domestic Tourism Snapshot

Year ending March 2014

Domestic visitors by region

	Visitors	Annual change ¹	Holiday Visitors	Annual change
Brisbane	5,035,000	-1.2%	1,411,000	0.5%
Gold Coast	3,543,000	-3.0%	2,174,000	-3.4%
Sunshine Coast	2,685,000	-2.0%	1,543,000	-12.2%
Fraser Coast	562,000	-1.7%	277,000	-3.1%
Southern Qld Country ⁷	1,751,000	-2.6%	509,000	-3.0%
Southern GBR	1,585,000	-13.6%	501,000	-16.1%
Mackay	649,000	-16.4%	137,000	-28.6%
Whitsundays	497,000	6.2%	304,000	-8.2%
Townsville	933,000	2.4%	323,000	-3.3%
TNQ	1,644,000	5.8%	954,000	10.4%
Three Year Trend	Visitors	Trend Change ⁸	Holiday Visitors	Trend Change ⁸
Outback	350,000	3.0%	126,000	3.2%

Brisbane

Domestic travel to Brisbane decreased 1.2% in the year to March 2014, which caused a decline in visitor expenditure. Whilst holiday travel to Brisbane increased marginally, the decrease in overall visitation was driven by declines in business and employment travel, likely the result of a softer resources sector.

Gold Coast

Domestic expenditure on the Gold Coast increased 1.5% to \$3.2 billion in the year to March 2014. The Gold Coast enjoyed a strong January to March quarter with domestic holiday travel increasing 12% compared with the same time the year prior. Whilst holiday travel from Brisbane (up 1.3%) and Melbourne (up 11.3%) increased, it was decline from Sydney visitors that impacted overall results.

Sunshine Coast

Domestic visitors to the Sunshine Coast declined 2%, which was driven by a decrease in the number of holiday and business travellers to the region. Interestingly, the number of VFR travellers surged 19%. This caused weaker expenditure results, as VFR travellers do not typically utilise commercial accommodation.

Tropical North Queensland

TNQ continued to record strong domestic visitation in the year to March 2014, with 1.6 million travellers heading to the region. This was an increase of 6% compared with the year prior. This growth was driven by a 10.4% increase in holidaymakers, which contributed to a boost in expenditure.

SGBR

Domestic visitation to the SGBR region declined in the year to March 2014. Whilst business travel recorded strong growth, it was weaker holiday and VFR travel that impacted overall results. The SGBR recorded strong growth in the January to March quarter, up 4%.

Southern Queensland Country

Domestic visitation to SQC softened in the year to March 2014, though visitors stayed longer in the region. Whilst the holiday and VFR sectors declined, business travel to SQC increased 22.4%.

Mackay

The number of Australians visiting Mackay in the year to March 2014 softened, driven by a decrease in holiday and VFR travel. The average length of stay of domestic visitors to Mackay increased by more than one night, which indicates that whilst less visitors came, those that did stayed longer.

Townsville

Townsville recorded strong growth in domestic travel, with visitor numbers reaching almost 1 million, driven by a 4% increase in intrastate trips. This bolstered total expenditure in the region, with Australians spending \$682 million (up 26% - the largest in the State).

Whitsundays

The Whitsundays recorded a strong domestic visitor result in the year to March 2014 with visitor numbers increasing 6% to almost 500,000. The increase in visitor numbers had a positive impact on expenditure, which grew around 14% to more than \$600 million.

Fraser Coast

Domestic visitation to the Fraser Coast decreased 1.7% in the year to March 2014, driven by a decline in intrastate holidaymakers. On a three year trend basis, domestic visitation to the Fraser Coast increased 3.2%.

Outback

Domestic travel to the Outback increased 3% in the three years to March 2014, with interstate travel boosting the overall result. Those that are travelling are also staying longer with visitor nights up 6% to 2 million over the same three year period.

Intrastate visitors by region

Intrastate	Visitors	Annual change
Brisbane	3,037,000	0.6%
Gold Coast	1,807,000	7.4%
Sunshine Coast	2,055,000	0.0%
Fraser Coast	419,000	-10.9%
Southern QLD Country ⁷	1,423,000	-1.6%
Southern GBR	1,363,000	-13.4%
Mackay	591,000	-13.2%
Whitsundays	316,000	6.4%
Townsville	770,000	4.2%
TNQ	1,076,000	6.7%

Interstate visitors by region

Interstate	Visitors	Annual change
Brisbane	1,998,000	-3.8%
Gold Coast	1,736,000	-11.7%
Sunshine Coast	630,000	-8.3%
Fraser Coast	143,000	40.2%
Southern QLD Country ⁷	328,000	-6.6%
Southern GBR	222,000	-14.9%
Mackay	n/p	n/p
Whitsundays	181,000	5.8%
Townsville	163,000	-5.8%
TNQ	569,000	4.2%

For more insights and data specific to any of the Queensland regions listed above, please refer to the Regional Snapshots which are released quarterly and can be found on our website at www.teq.queensland.com

⁷ In order to improve the reliability of information presented for the Toowoomba, South Burnett, Southern Downs and Westerns Downs regions, data for these regions will no longer be reported separately. Data for these regions will now be reported within the Southern Qld Country region in the Domestic Tourism Snapshot.

Year ending March 2014

Domestic visitor expenditure¹ in Australia by state

by State	\$ million	Annual change	Share	\$/Visitor
Queensland	\$13,575.5m	-1.1%	25.9%	\$765.87
NSW	\$15,346.7m	10.0%	29.3%	\$584.02
VIC	\$10,733.1m	4.4%	20.5%	\$562.84
Other	\$12,688.5m	2.6%	24.2%	\$741.94
Total Australia	\$52,343.8m	4.0%	100%	\$674.77

Domestic visitor expenditure in Queensland by region

by Region	\$ million	Annual change	Share	\$/Visitor
Brisbane	\$3,108.0m	-4.4%	22.9%	\$616.12
Gold Coast	\$3,195.3m	1.5%	23.5%	\$901.97
Sunshine Coast	\$1,710.1m	-12.9%	12.6%	\$642.30
Fraser Coast	\$274.4m	-13.1%	2.0%	\$467.06
Southern QLD Country ⁷	\$740.0m	15.1%	5.5%	\$421.54
Southern GBR	\$840.9m	-17.6%	6.2%	\$504.58
Mackay	\$304.7m	-25.6%	2.2%	\$469.76
Whitsundays	\$601.4m	14.1%	4.4%	\$1,210.72
Townsville	\$681.7m	25.6%	5.0%	\$730.54
Outback ⁸	\$260.9m	n/p ⁸	1.9%	\$745.52
TNQ	\$1,743.9m	10.1%	12.8%	\$1,060.60

Data Source:

The information included in this report refers to overnight visitor data extracted from the National Visitor Survey, managed by Tourism Research Australia. Approximately 120,000 Australian residents aged 15 and over are surveyed on an annual basis using a telephone interview. The statistics included in this report depict rolling annual data and are updated each quarter. The use of rolling annual data removes seasonality from the data allowing the measurement of real growth and decline.

For this publication data has been adjusted to conform to Tourism and Events Queensland's tourism region definitions. These are consistent with current Regional Tourism Organisation boundaries.

For Further Information:

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Notes:

1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. Avg stay: Average length of stay.
3. VFR: Visiting friends or relatives. Please note: Figures for regional visitation may be impacted by the VFR market. VFR visitors typically stay with friends or family and as such their commercial impact on the tourism industry can be less obvious than that of holiday or business visitors.
4. Expenditure including airfares and long distance transport costs.
5. Expenditure excluding airfares and long distance transport costs.
6. Leisure: the purposes of holiday and VFR combined.
7. The Southern Queensland Country region is inclusive of the Toowoomba, South Burnett, Southern Downs and Western Downs regions.
8. Trend change refers to the percentage change between the three years to this year ended, compared to the three years to the year prior.

Tourism Research Australia have implemented a dual frame methodology to the National Visitor Survey, effective from January 2014. Using a dual frame survey methodology, a portion of the sample is collected from residential landlines and another from mobile phones. This will help overcome potential bias caused by an increasing proportion of Australia's population being outside the scope of the NVS because they live in "mobile phone only" households. For this reason, annual change results are a guide only as they are not directly comparable.

n/p Not publishable

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