

## Year ending September 2014

### Domestic Visitors to Australia

	Visitors	Annual change <sup>1</sup>	Avg Stay <sup>2</sup>	Annual change
Total	79,736,000	▲ 5.0%	3.8	▲ 2.7%
Holiday	32,738,000	-1.0%	4.0	-2.4%
VFR <sup>3</sup>	28,822,000	9.1%	3.4	0.0%
Business	15,270,000	8.0%	3.6	12.5%

Intrastate	55,624,000	▲ 5.6%	3.1	▲ 3.3%
Holiday	24,045,000	-0.8%	3.3	0.0%
VFR	20,173,000	9.7%	2.6	0.0%
Business	8,575,000	12.5%	3.6	24.1%

Interstate	25,550,000	▲ 3.2%	5	▼ -2.0%
Holiday	9,361,000	-1.5%	5.4	-5.3%
VFR	8,973,000	7.3%	5.0	-2.0%
Business	6,838,000	2.6%	3.4	3.0%

### Expenditure in Australia

Australia	\$ million	Annual change
Total <sup>4</sup>	\$53,744.4m	▲ 3.9%
Holiday <sup>5</sup>	\$22,661.3m	-0.2%
VFR <sup>5</sup>	\$9,514.3m	9.4%
Business <sup>5</sup>	\$8,780.1m	11.6%

### National Increase

Domestic overnight travel in Australia increased 5% to 79.7 million visitors in the year to September 2014. This growth was driven by a 9.1% percent boost from those who were visiting friends or relatives (VFR), as the appeal of budget travel options remains strong. This firm VFR result was able to offset a 1% decline in domestic overnight holiday travel. Those travelling for the purpose of business increased 8%, which partially contributed to the overall increase in travel.

### Homeland

The key driver of domestic overnight travel in Australia was intrastate travel, being those that are travelling within their home state. It was intrastate business travel that contributed the highest growth in the national, with local business visitation increasing 12.5% to 8.6 million visitors.

### No Interstate Date

Interstate travel increased 3.2% driven by the VFR and business markets. As was the case with overall results, holiday travel declined marginally (down 1.5%) as Australian's opted to visit friends or relatives or set off for an overseas holiday.

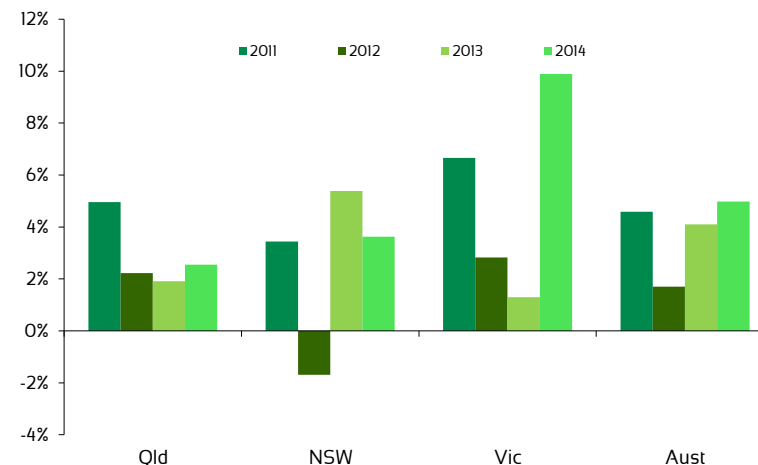
### Stimulating Spend

Overnight visitor expenditure in Australia increased 3.9% in the year to September 2014, with total spend reaching \$53.7 billion. As was the case with visitation results, holiday expenditure declined marginally to \$22.7 billion. The high yielding business sector drove overall growth, with these travellers spending \$8.8 billion during the past year, which was an 11.6% increase. To complement this, the VFR market increased their expenditure by 9.4% to \$9.5 billion.

Domestic visitors within Australia (million)



State comparison - domestic visitors (percentage change)



Year ending September 2014

## Year ending September 2014

### Domestic Visitors to Queensland

	Visitors	Annual Change <sup>1</sup>	Avg Stay	Annual change
Total	18,327,000	▲ 2.5%	4.3	▲ 2.4%
Holiday	7,399,000	-4.4%	4.6	0.0%
VFR	6,517,000	6.3%	3.8	0.0%
Business	3,597,000	8.2%	4.1	20.6%

	Visitors	Annual Change <sup>1</sup>	Avg Stay	Annual change
Intrastate	12,843,000	▲ 4.2%	3.6	▲ 9.1%
Holiday	5,051,000	-3.9%	3.5	2.9%
VFR	4,564,000	7.4%	3.1	3.3%
Business	2,478,000	13.6%	4.3	26.5%

	Visitors	Annual Change <sup>1</sup>	Avg Stay	Annual change
Interstate	5,484,000	▼ -1.0%	6.0	▼ -1.6%
Holiday	2,349,000	-5.4%	7.1	0.0%
VFR	1,953,000	3.8%	5.4	-3.6%
Business	1,119,000	-2.2%	3.5	0.0%

### Expenditure in Queensland

Queensland	\$ million	Annual change
Total <sup>4</sup>	\$13,835.4m	▼ -1.5%
Holiday <sup>5</sup>	\$6,220.9m	-5.0%
VFR <sup>5</sup>	\$2,451.0m	6.6%
Business <sup>5</sup>	\$1,967.5m	1.2%

### Queensland Growth

The number of domestic overnight visitors to Queensland increased 2.5% to 18.3 million in the year to September 2014. As was the case nationally, this growth was driven by the VFR and business sectors (up 6.3% and 8.2% respectively). A 4.4% decline in the number of holidaymakers to Queensland was unable to offset growth from the abovementioned sectors.

The number of nights spent in Queensland increased 5.7% to 78.5 million during the past year, which in turn saw the average length of stay in Queensland increase to 4.3 nights. The holiday sector spends the longest time in the State (4.6 nights) compared to 4.1 nights for business travellers and 3.8 nights for VFR travellers.

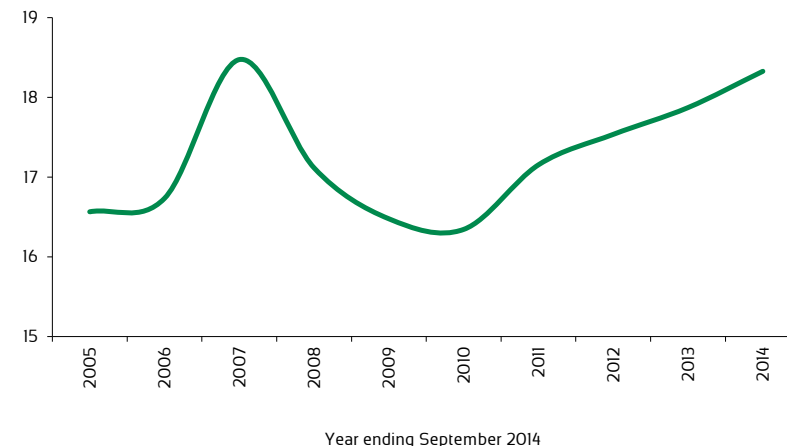
The major driver of domestic visitation growth in Queensland was the intrastate market, who increased their travel within Queensland by 4.2%. This result reveals that 70% of all domestic visitors to Queensland live within the state, compared to 30% for interstate travellers. Intrastate business and VFR travel were the largest growth sectors, up 13.6% and 7.4% respectively.

Interstate travel to Queensland declined marginally in the year to September 2014, driven by less interstate holidaymakers. This result was essentially offset by 3.8% growth from interstate VFR travellers, though these visitors are lower yielding as they typically do not utilise commercial accommodation.

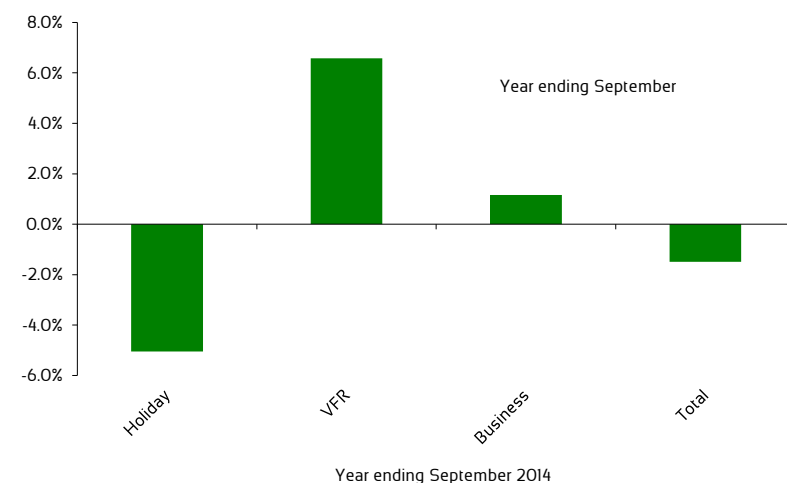
### Expenditure Impacted

Domestic overnight visitor expenditure in Queensland declined marginally to \$13.8 billion in the year to September 2014, as the share of VFR travellers increased at the expense of the higher yielding holiday sector. VFR travel increased 6.6% to \$2.5 billion during the last twelve months, and now represents 22% of all tourism dollars spent in the state, compared to 56% for holiday visitation. Business sector expenditure increased 1.2% to \$2 billion, which reflects the cyclical nature of the resources industry in Queensland

Domestic visitors to Queensland (million)



Annual Change in expenditure in Queensland - Purpose



## Year ending September 2014

### Domestic visitors by region

	Visitors	Annual change <sup>1</sup>	Holiday Visitors	Annual change
Brisbane	5,236,000	3.8%	1,359,000	-5.9%
Gold Coast	3,415,000	-6.1%	2,072,000	-4.6%
Sunshine Coast	2,931,000	10.9%	1,624,000	0.9%
Fraser Coast	508,000	-5.0%	283,000	16.9%
Southern Qld Country <sup>7</sup>	1,766,000	-5.6%	475,000	-16.8%
Southern GBR	1,776,000	11.5%	573,000	10.2%
Mackay	734,000	-5.7%	144,000	-19.1%
Whitsundays	474,000	-3.5%	325,000	6.9%
Townsville	873,000	-8.6%	270,000	-21.5%
TNQ	1,692,000	1.2%	878,000	-9.5%
Three Year Trend	Visitors	Trend Change <sup>8</sup>	Holiday Visitors	Trend Change <sup>8</sup>
Outback	402,000	-0.8%	146,000	-2.7%

### Brisbane

There was a 3.8% increase in domestic travel in the year ended September 2014. This growth was predominantly driven by the VFR sector, which increased 10.1%. The increase in VFR travel at the expense of holiday travel caused overnight visitor expenditure to be flat.

### Gold Coast

Domestic overnight visitors to the Gold Coast declined 6.1% in the year to September 2014, driven by less holidaymakers to the region. The Gold Coast was one of only a few regions that recorded growth in the number of day-trippers to the region, which suggests that domestic travellers are enjoying the tourism offerings on the Gold Coast without necessarily staying in commercial accommodation.

### Sunshine Coast

The Sunshine Coast backed up a very strong international result with a 10.9% increase in overnight domestic travel to the region during the past year. This result was driven by the VFR and business sectors, which recorded very solid growth. In comparison, holiday travel to the Sunshine Coast increased marginally.

### Tropical North Queensland

Domestic visitation to TNQ increased 1.2% as a result of a 29.6% increase in VFR travel and a 7.7% increase in business travel. Whilst the holiday sector weakened, overnight visitor expenditure increased 2.9%

### SGBR

Domestic visitation to the SGBR region increased 11.5% in the year to September 2014, which was the strongest domestic travel result in Queensland. What was more impressive was that this growth was driven by a 10.2% increase in holiday travel (in addition to a 31.5% increase from the business sector).

### Southern Queensland Country

Domestic visitation to SQC declined 5.6% in the year to September 2014, driven by a decline in holiday and VFR travel. In contrast to this, business travel increased by more than 6.5%, to 528,000

### Mackay

The number of domestic visitors to Mackay softened in the year to September 2014, driven by weaker holiday and VFR travel. The number of nights spent in the region increased 21.1%, meaning that visitors are opting for much longer stays in the region.

### Townsville

The number of domestic visitors to Townsville declined during the last year, driven by a softer holiday market. VFR and business travel increased 2% and 8.1% respectively, however this was unable to offset the overall decrease.

### Whitsundays

Whilst overall domestic travel to the Whitsundays declined in the year to September 2014, the number of holidaymakers to the region increased 6.9%, which was in contrast to state-wide holiday results.

### Fraser Coast

The Fraser Coast region recorded the strongest growth in holiday travel of all Queensland regions (up 16.9%). Unfortunately, this was unable to offset declines in VFR and business travel, and overall results weakened accordingly.

### Outback

Domestic travel to the Outback remained virtually stable in the three years to September 2014. Growth in the VFR and employment sectors offset declines in holiday and business travel. Nights spent in the Outback increased 10.1% during the same three year period, which caused the average length of stay to reach 5.1 nights.

### Intrastate visitors by region

Intrastate	Visitors	Annual change
Brisbane	3,059,000	0.6%
Gold Coast	1,719,000	-1.8%
Sunshine Coast	2,252,000	16.4%
Fraser Coast	357,000	-16.8%
Southern QLD Country <sup>7</sup>	1,452,000	-2.6%
Southern GBR	1,537,000	14.4%
Mackay	616,000	-13.1%
Whitsundays	286,000	-6.8%
Townsville	711,000	-6.3%
TNQ	1,161,000	5.8%

### Interstate visitors by region

Interstate	Visitors	Annual change
Brisbane	2,177,000	8.8%
Gold Coast	1,696,000	-10.1%
Sunshine Coast	679,000	-4.2%
Fraser Coast	151,000	41.1%
Southern QLD Country <sup>7</sup>	314,000	-17.2%
Southern GBR	240,000	-3.6%
Mackay	117,000	69.6%
Whitsundays	188,000	2.2%
Townsville	162,000	-17.3%
TNQ	531,000	-7.7%

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](http://www.teq.queensland.com)

<sup>7</sup> 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 September 2014

### Domestic visitor expenditure<sup>1</sup> in Australia by state

by State	\$ million	Annual change	Share	\$/Visitor
Queensland	\$13,835.4m	-1.5%	25.7%	\$754.93
NSW	\$15,295.9m	1.6%	28.5%	\$578.62
VIC	\$11,250.4m	12.4%	20.9%	\$0.00
Other	\$13,362.7m	6.1%	24.9%	\$755.45
Total Australia	\$53,744.4m	3.9%	100%	\$674.03

### Domestic visitor expenditure in Queensland by region

by Region	\$ million	Annual change	Share	\$/Visitor
Brisbane	\$3,217.6m	-0.7%	23.3%	\$612.77
Gold Coast	\$3,076.6m	-2.6%	22.2%	\$900.25
Sunshine Coast	\$1,807.9m	-6.0%	13.1%	\$618.73
Fraser Coast	\$333.6m	3.2%	2.4%	\$642.91
Southern QLD Country <sup>7</sup>	\$763.0m	14.1%	5.5%	\$430.84
Southern GBR	\$924.1m	-8.3%	6.7%	\$497.05
Mackay	\$367.1m	-9.4%	2.7%	\$500.38
Whitsundays	\$550.5m	-4.4%	4.0%	\$1,162.04
Townsville	\$615.7m	-10.2%	4.5%	\$702.53
Outback <sup>8</sup>	\$270.3m	-4.0%	2.0%	\$672.78
TNQ	\$1,789.8m	2.9%	12.9%	\$1,056.09

#### 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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