# Brisbane Regional Snapshot

Tourism Queensland

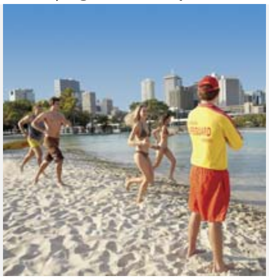
## Year ended March 2011

**IMPORTANT MESSAGE:**

**Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, domestic data for tourism regions will be presented as a 3 year average, with change over time shown as a 3 year trend change, not year on year change as in previous regional snapshots. Please note that the trend variances provided incorporate changes that occurred in tourism during the onset of the Global Financial Crisis and look at longer term trends rather than recent changes over the last year.**

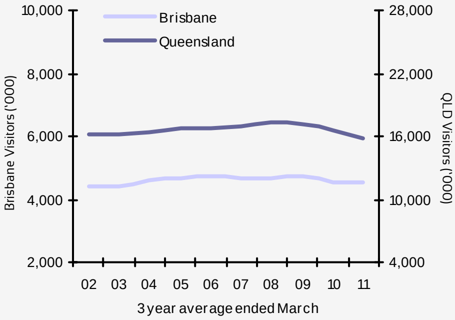
**National and state level NVS data will be published as normal on a year ended basis.**

**Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.**



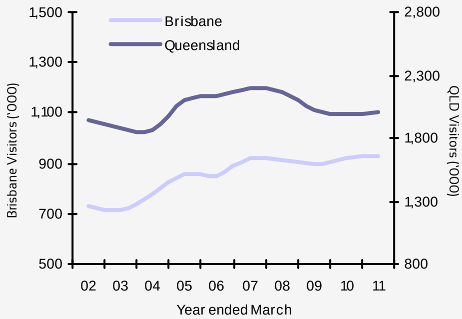
| | Visitors | Holiday | VFR | Business | Expenditure ($m) |
|---|---|---|---|---|---|
| Domestic overnight 3 year average | 4,538,000 | 1,303,000 | 1,708,000 | 1,195,000 | $2,439 |
| Trend change[1] | ▼ -1% | ▲ 3% | ▼ -6% | ● 0% | ▼ -4% |
| International overnight | 926,000 | 456,000 | 279,000 | 119,000 | $1,393 |
| Annual change[2] | ▲ 1% | ▼ -10% | ▲ 7% | ▲ 14% | ▲ 2% |
| Trend change | ▲ 1% | ▼ -3% | ▲ 5% | ▲ 2% | ▲ 2% |

### Domestic visitation



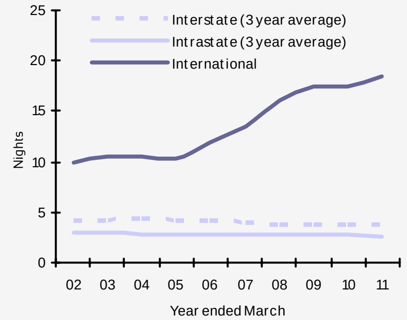

- Brisbane has had mixed domestic results over the 3 years to March 2011 with holiday remaining buoyant, but VFR (visiting friends or relatives) declining.
- Declines in VFR were the result of the downturn that occurred following the Global Financial Crisis (GFC), combined with more recent weakening in intrastate travel.
- Interstate travel to Brisbane has remained steady over the past three years. Declines in interstate business and VFR travel were offset by a rise in interstate holiday travel.
- While driving remains the prominent means of transport to Brisbane, 37% of domestic visitors now fly to the region. Visitors from within Queensland and regional NSW have been increasingly inclined to fly to the region.

### International visitation




- There was little change in the number of international visitors to Brisbane in the year ending March 2011; partially attributable to the recent Brisbane floods subduing growth.
- Holiday visitors to Brisbane declined by 10% (or 50,000 visitors). However, these declines were offset by increases in VFR and business travel.
- The number of Chinese visitors coming to Brisbane for VFR and holiday increased substantially. There has also been growth in other key Asian markets.
- The New Zealand holiday market to Brisbane saw a rebound following a two year decline, driven by a recovery in air capacity.
- The United Kingdom (UK) holiday market has continued to decline, the result of the lagging economic recovery in the UK.

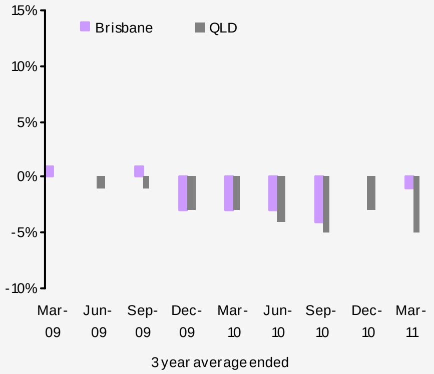
### Average length of stay (Brisbane)




- International visitor's average length of stay in Brisbane increased over the year, the result of business travellers spending longer on average in the region.
- International expenditure increased in the year ending March 2011, the result of increases in Chinese visitation and business visitors length of stay.
- Education visitors account for 37% of all international visitor nights spent in Brisbane.
- Domestic length of stay remained flat, which is a relatively positive result given that Brisbane was impacted by floods and the domestic market trends towards shorter stays in Queensland.
- Domestic expenditure has declined over the past three years, from highs achieved prior to the Global Financial Crisis.

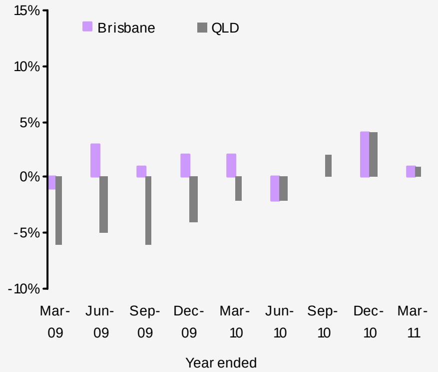
### Domestic visitation

3 year percentage change in visitation




### International visitation

Annual percentage change in visitation




Domestic visitation to Brisbane, while increasing over the long-term, has been in decline more recently. However, in comparison to the Queensland average, Brisbane has faired reasonably well.

Recent growth in Brisbane's international market has been similar to the Queensland average.

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# Domestic visitation

## Domestic visitors to Brisbane 3 year average to March 2011

| | Visitors | Trend % change | Nights | Trend % change | Length of stay | Nights change |
|---|---|---|---|---|---|---|
| Holiday | 1,303,000 | 3% | 4,094,000 | -2% | 3.1 | -0.1 |
| VFR | 1,708,000 | -6% | 5,852,000 | -5% | 3.4 | 0.0 |
| Business | 1,195,000 | 0% | 3,038,000 | 1% | 2.5 | 0.0 |
| **Total[3]** | 4,538,000 | -1% | 14,155,000 | -1% | 3.1 | 0.0 |
| Intrastate | | | | | | |
| Holiday | 823,000 | 2% | 2,043,000 | -6% | 2.5 | -0.2 |
| VFR | 988,000 | -8% | 2,498,000 | -12% | 2.5 | -0.1 |
| Business | 494,000 | 6% | 1,222,000 | 11% | 2.5 | 0.1 |
| Total | 2,553,000 | -1% | 6,570,000 | -4% | 2.6 | -0.1 |
| Interstate | | | | | | |
| Holiday | 479,000 | 4% | 2,051,000 | 3% | 4.3 | 0.0 |
| VFR | 720,000 | -2% | 3,355,000 | 0% | 4.7 | 0.1 |
| Business | 700,000 | -4% | 1,816,000 | -4% | 2.6 | 0.0 |
| Total | 1,984,000 | 0% | 7,584,000 | 1% | 3.8 | 0.0 |

## Domestic day trip visitors year ended March 2011

| | Day trip visitors | Annual % change | Expenditure ($) million | Annual % change |
|---|---|---|---|---|
| Brisbane[4] | 10,556,000 | 7% | $1,031 | 7% |
| Queensland | 34,258,000 | 7% | $3,627 | 7% |
| Australia | 151,948,000 | 3% | $14,950 | -1% |

Consumers remain budget conscious with global and domestic uncertainties continuing to subdue consumer confidence. As a result, domestic travellers are increasingly taking more affordable day trips, rather than overnight trips.

## Key domestic source markets to Brisbane 3 year average to March 2011

| **Total visitors** | Visitors | Trend % change | Nights | Trend % change |
|---|---|---|---|---|
| Regional Qld | 1,982,000 | 0% | 5,248,000 | -4% |
| Sydney | 615,000 | -5% | 1,929,000 | -9% |
| Other NSW | 580,000 | 6% | 2,055,000 | 11% |
| Brisbane | 571,000 | -4% | 1,322,000 | -2% |
| Melbourne | 322,000 | -2% | 1,235,000 | 1% |
| Other | 468,000 | 0% | 2,365,000 | 2% |

## State comparison Domestic year ended March 2011

| **Total visitors** | Visitors | Annual % change | Nights | Annual % change |
|---|---|---|---|---|
| Queensland | 16,037,000 | 3% | 67,025,000 | -4% |
| NSW | 23,505,000 | 4% | 79,124,000 | 3% |
| Victoria | 16,084,000 | 1% | 49,663,000 | -1% |
| Rest of Aus | 14,251,000 | 1% | 61,230,000 | 2% |
| Australia | 67,605,000 | 2% | 257,042,000 | 0% |
| Holiday visitors | | | | |
| Queensland | 6,914,000 | -1% | 33,885,000 | -3% |
| NSW | 10,203,000 | -1% | 38,833,000 | 2% |
| Victoria | 7,504,000 | 0% | 25,048,000 | -1% |
| Rest of Aus | 6,168,000 | -2% | 28,744,000 | -1% |
| Australia | 29,676,000 | -1% | 126,510,000 | -1% |

Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.

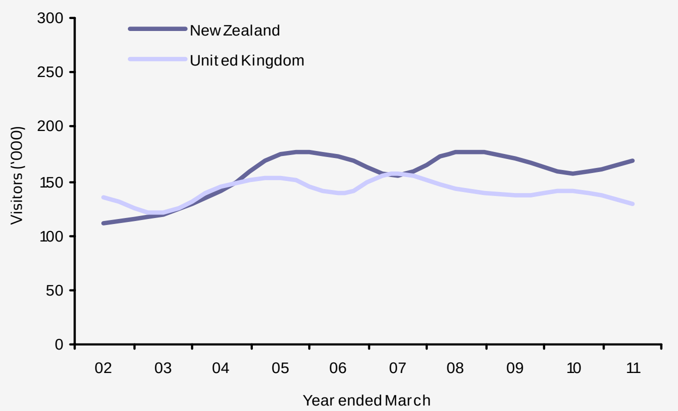
# Brisbane Regional Snapshot

## International visitation Year ended March 2011

### International visitors to Brisbane

| | Visitors | Annual % change | Nights | Annual % change | Length of stay | Nights change |
|---|---|---|---|---|---|---|
| Holiday | 456,000 | -10% | 4,722,000 | -8% | 10.4 | 0.2 |
| VFR | 279,000 | 7% | 4,162,000 | 10% | 14.9 | 0.4 |
| Business | 119,000 | 14% | 832,000 | 31% | 7.0 | 0.9 |
| **Total[3]** | 926,000 | 1% | 17,018,000 | 6% | 18.4 | 0.9 |

New Zealand and United Kingdom visitors to Brisbane
YE March 02-11




### Key international source markets to Brisbane

| **Total visitors** | Visitors | Annual % change | Nights | Annual % change |
|---|---|---|---|---|
| New Zealand | 168,000 | 7% | 1,489,000 | 25% |
| United Kingdom | 130,000 | -8% | 1,559,000 | -16% |
| China | 84,000 | 35% | 2,244,000 | 37% |
| United States | 56,000 | -11% | 664,000 | 8% |
| Germany | 45,000 | -13% | 563,000 | -15% |
| Holiday visitors | | | | |
| United Kingdom | 77,000 | -21% | 551,000 | -46% |
| New Zealand | 49,000 | 11% | 278,000 | 20% |
| China | 47,000 | 18% | 136,000 | 16% |
| Germany | 35,000 | -13% | 341,000 | -14% |
| Korea | 26,000 | 13% | 936,000 | 8% |

### State comparison - International

| **Total visitors** | Visitors | Annual % change | Nights | Annual % change |
|---|---|---|---|---|
| Queensland | 2,002,000 | 1% | 39,474,000 | -1% |
| NSW | 2,829,000 | 3% | 66,266,000 | 7% |
| Victoria | 1,693,000 | 10% | 40,628,000 | 2% |
| Rest of Aus | 1,394,000 | 3% | 40,232,000 | 3% |
| Australia[5] | 5,396,000 | 4% | 186,600,000 | 3% |
| Holiday visitors | | | | |
| Queensland | 1,379,000 | -3% | 17,804,000 | -8% |
| NSW | 1,573,000 | 0% | 20,642,000 | -2% |
| Victoria | 810,000 | 7% | 7,910,000 | -2% |
| Rest of Aus | 755,000 | 1% | 11,414,000 | -7% |
| Australia[5] | 2,866,000 | 1% | 57,770,000 | -5% |

International tourism to Australia recovered in the year ending March 2011, boosted by long-haul business and visitation from China. Queensland saw similar trends, although growth was more subdued due to the decline in international holiday visitors, particularly those from the United Kingdom, New Zealand and the United States.

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

Overview snapshots are also available for both Domestic and International visitors. Any questions or comments, please email research@tq.com.au

The Brisbane tourism region aligns with the ABS Brisbane region, extending across Gatton and Ipswich, Caboolture, Logan and Brisbane city.

# Brisbane Regional Snapshot

## Regional visitation

### Domestic Regional Comparison (3 year average to March 2011)

| | Visitors | Trend % change | Nights | Trend % change | Length of stay | Nights change | Holiday % | VFR % | Business % | % Share of visitors to QLD |
|---|---|---|---|---|---|---|---|---|---|---|
| **Brisbane** | **4,538,000** | **-1%** | **14,155,000** | **-1%** | **3.1** | **0.0** | **29%** | **38%** | **26%** | **28%** |
| Gold Coast | 3,243,000 | -3% | 13,437,000 | -7% | 4.1 | -0.2 | 61% | 27% | 9% | 20% |
| Sunshine Coast | 2,615,000 | -5% | 10,560,000 | -6% | 4.0 | -0.1 | 61% | 29% | 7% | 16% |
| TNQ | 1,384,000 | -7% | 7,393,000 | -4% | 5.3 | 0.2 | 55% | 24% | 17% | 9% |
| Toowoomba | 1,186,000 | -5% | 3,526,000 | -1% | 3.0 | 0.1 | 31% | 41% | 21% | 7% |
| Townsville | 783,000 | -12% | 3,011,000 | -9% | 3.8 | 0.1 | 33% | 28% | 29% | 5% |
| Capricorn | 776,000 | -9% | 2,847,000 | -4% | 3.7 | 0.2 | 33% | 28% | 31% | 5% |
| Mackay | 588,000 | -10% | 2,388,000 | -9% | 4.1 | 0.1 | 27% | 28% | 40% | 4% |
| Fraser Coast | 572,000 | 1% | 2,326,000 | -5% | 4.1 | -0.3 | 49% | 33% | 14% | 4% |
| Bundaberg | 513,000 | -5% | 1,819,000 | -7% | 3.5 | -0.1 | 35% | 37% | 19% | 3% |
| Whitsundays | 458,000 | -3% | 1,973,000 | 1% | 4.3 | 0.2 | 69% | 16% | 12% | 3% |
| Outback | 361,000 | -10% | 1,867,000 | -6% | 5.2 | 0.2 | 37% | 19% | 37% | 2% |
| Gladstone | 312,000 | -4% | 1,323,000 | 10% | 4.2 | 0.6 | 46% | 30% | 20% | 2% |
| Western Downs | 301,000 | -22% | 878,000 | -19% | 2.9 | 0.1 | 43% | 26% | 24% | 2% |
| Southern Downs | 247,000 | 0% | 586,000 | -4% | 2.4 | -0.1 | 52% | 31% | 13% | 2% |
| Total | 15,876,000 | -5% | 68,430,000 | -5% | 4.3 | 0.0 | 44% | 32% | 20% | - |

Please note the total for all regions uses 3 year average visitation data and trend % change to provide a meaningful point of comparison with the regional data presented. The total figures above will differ to those in the State Comparison on page 2 of this snapshot, which use year end March 2011 visitation data and year on year % change.

### International Regional Comparison (Year ended March 2011)

| | Visitors | Annual % change | Nights | Annual % change | Length of stay | Nights change | Holiday % | VFR % | Business % | % Share of visitors to QLD |
|---|---|---|---|---|---|---|---|---|---|---|
| **Brisbane** | **926,000** | **1%** | **17,018,000** | **6%** | **18.4** | **0.9** | **49%** | **30%** | **13%** | **46%** |
| Gold Coast | 783,000 | -6% | 7,799,000 | -5% | 10.0 | 0.1 | 77% | 16% | 5% | 39% |
| TNQ | 661,000 | 0% | 5,830,000 | -7% | 8.8 | -0.7 | 91% | 5% | 3% | 33% |
| Sunshine Coast | 271,000 | -3% | 2,646,000 | 4% | 9.8 | 0.7 | 78% | 18% | 3% | 14% |
| Whitsundays | 191,000 | -14% | 1,086,000 | -15% | 5.7 | -0.1 | 96% | 3% | 1% | 10% |
| Fraser Coast | 151,000 | -19% | 565,000 | -26% | 3.7 | -0.4 | 97% | 4% | 0% | 8% |
| Townsville | 124,000 | -14% | 1,361,000 | -2% | 11.0 | 1.4 | 78% | 13% | 5% | 6% |
| Capricorn | 72,000 | -11% | 499,000 | -42% | 7.0 | -3.6 | 81% | 11% | 4% | 4% |
| Gladstone | 57,000 | -11% | 243,000 | -47% | 4.3 | -2.9 | 88% | 7% | 5% | 3% |
| Mackay | 46,000 | -16% | 350,000 | -20% | 7.6 | -0.4 | 76% | 17% | 7% | 2% |
| Bundaberg | 40,000 | -13% | 746,000 | 18% | 18.6 | 5.0 | 78% | 15% | 0% | 2% |
| Toowoomba | 36,000 | -8% | 703,000 | 3% | 19.6 | 2.1 | 44% | 33% | 14% | 2% |
| Outback | 24,000 | -11% | 253,000 | -26% | 10.5 | -2.2 | 75% | 13% | 8% | 1% |
| Western Downs | 12,000 | 0% | 167,000 | 8% | 14.1 | 1.3 | 58% | 17% | 8% | 1% |
| Southern Dns | 10,000 | 25% | 205,000 | 24% | 20.0 | 0.6 | 70% | 30% | 0% | 0% |
| Total | 2,002,000 | 1% | 39,474,000 | -1% | 19.7 | -0.5 | 69% | 25% | 9% | - |

***Data sources:*** National & International Visitor Surveys, Tourism Research Australia.

1. Trend change refers to the percentage change between the 3 years average ended March 2010 vs. the 3 years average ended March 2011.
2. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.
3. This figure includes "Other" visitors.
4. 3 year average ended March 2011.
5. Excludes Transit visitors who did not have a stopover place.

n/p not published.

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.