UQ Business School
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Tourism in the Granite Belt Destination Report

This report is one of a set of reports for a research project that looks at how economic understanding of the interactions amongst rural / regional industries can add to economic resilience, in the face of ongoing challenges for regional areas.

The key results of this stand-alone report on *The Granite Belt Visitor Survey* are also incorporated into other reports for this project.

The University of Queensland research team was led by Dr Sally Driml of the Business School and Associate Professor Richard Brown of the School of Economics.

The University of Queensland research team would like to thank the many tourism businesses and their staff, visitor centres and visitors who assisted with the survey.

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Reports for this Research Project

1. Tourism in the Granite Belt Destination Report
2. The Granite Belt Visitor Survey Report
3. Economic Report on the Granite Belt Grape and Wine Industries
4. Agriculture and Tourism – regional economic contributions and links. A case study of the wine and tourism industries in the Granite Belt region. Project Report

Cover page photographs from Tourism and Events Queensland

Executive Summary

The Granite Belt region /destination is a well-established tourism destination with wineries and national parks being prominent attractions but also featuring other attractions centred on locally produced food and beverages, heritage and museum attractions and a program of festivals and events.

Tourism is facilitated by government and industry bodies that cooperate to support planning, marketing, promotion of visitor trails and events and a visitor centre.

Data that is not generally published at the destination scale was assembled from Tourism Research Australia's database to describe tourism in the destination.

In summary, pre COVID 19, the Granite Belt destination had a fairly constant stream of visitors over the last 10 years.

The March quarter consistently has the lowest visitor number of domestic visitors with the June and September quarters, which feature the colder weather and school holidays, the most popular.

While there are relatively few international visitors, these people contribute to the destination by staying longer and working on properties.

Pre COVID 19, the main source of visitors was domestic visitors, mainly from Southeast Queensland, travelling on day trips or short overnight trips of 1 to 3 days.

Around 250,000 people visited the destination in 2019. This was made up of domestic overnight visitors 59%, domestic day trip visitors 39% and international visitors 2%.

The destination attracts an older demographic (36% of visitors are over 55 years of age), and couples with no children in all age groups, and a smaller proportion of families with young children (10% of visitors).

There is a clear seasonal element with the destination being more popular in the colder months of the June and September quarters, although efforts are being made to attract visitors in other months.

Visitors engage in multiple activities while in the destination, with an average of three activities in addition to the usual social and eating and drinking elements of a holiday. For domestic overnight tourists, the most popular local activities were visiting wineries (26%), followed by bushwalking (21%) and visiting national parks (19%). Visiting markets also attracted 16% of these visitors. The three most popular local activities for day trippers were also visiting wineries (15%) and bushwalking (12%) and visiting national parks (7%).

Tourists spent $79 million per year in the Granite Belt Destination, on average from 2015 to 2018. This was made up of $53 million from domestic overnight visitors, $13 million from domestic day trip visitors and $13 million from international visitors. An estimate of total full time equivalent jobs supported by this expenditure is approximately 553 jobs.

The group of domestic overnight visitors who visited wineries spent $19 million in the Granite Belt destination. Due to small sample sizes, it is not possible to estimate the spending by day trip and international visitors who visited wineries. Therefore, the estimate of $19 million contribution to the region by winery visitors is conservative. Approximately 133 jobs are supported by this expenditure.

Similarly, visitors who visited national parks spent $14 million in the Granite Belt destination, supporting approximately 98 jobs. These are not mutually exclusive groups because many visitors visited both wineries and national parks.

The impact of COVID-19 on the destination has been mixed - the bushfires and then the pandemic have reduced visitor numbers at times over the past two years. There have also been times when visitor numbers have been higher than usual in the destination. The net effect on visitor numbers and expenditure by visitors to the Granite Belt destination is not available from published or unpublished statistics yet.

Several opportunities for increasing the number and spending by tourists were identified by looking at the statistics and the gaps revealed. First, are the opportunities to increase tourism within current infrastructure and attractions, making better use of what is already in the destination by increasing the length of stay/ utilise weekdays and increasing visitors in low seasons. Second, the visitor statistics suggest gaps in the market with potential opportunities to appeal to new visitor groups (e.g., families, international visitors), expand existing popular attractions, market better and possibly add new attractions (e.g., night-time entertainment, indigenous and cultural tourism).

A survey of 16 grape growers and wine producers included questions focussing on tourism in their operations and the destination. While only half of the respondents said they were interested in increasing tourism revenue from their own operations, the range of options mentioned included: using social media and online options better, add new experiences and events at the cellar door and on the property, expand on site accommodation and travel to promote the business.

Looking to the broader destination, many positives were noted: friendly people, visitors meet business owners, the national park and scenic landscape, cold weather, 4 seasons, wineries, wine, quality of wine, education about wine, some good restaurants and accommodation, lots to do and an inexpensive destination.

Negative perceptions and identifying barriers focused on: lack of dining options, lack of local produce featured in restaurants, staff shortages (including chefs), lack of accommodation, shops closed in the town, unstable water resources and poor road maintenance. Suggestions for useful government actions included: facilitating coordination of industry stakeholders for development, support and funding for local tourism organisations, marketing (destination and wine marketing), assisting to overcome staff shortages, support apprentices and staff training, fix the roads.

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1. Introduction and Background

The purpose of this report

This report is one of a set of reports for a research project that looks at how economic understanding of the interactions amongst rural / regional industries can add to economic resilience, in the face of ongoing challenges for regional areas.

This research project has selected a case study set in a regional area where agriculture and tourism are closely associated, to explore economic interactions, and opportunities and challenges for both industries to support each other to make economic contributions within the region.

The case study selected is in the Granite Belt region in southern Queensland, centred on Stanthorpe and surrounds. This area has a grape growing and wine industry based on small farms and wineries. Many of these wineries have cellar doors where they engage directly with visitors who buy wine, stay in on-farm accommodation, and enjoy hospitality, events etc. offered by these businesses. Thus, tourism is an essential part of the wine industry. In turn, the attractions of the wine industry in the region, along with other attractions including national parks and regional food offerings, support a broader tourism industry in the Granite Belt destination.

While there have been several informative studies conducted for this region, this project has an economic focus. This current *Tourism in the Granite Belt Destination Report* provides a summation of economic statistics and new visitor use information. This report is a stand-alone report on the tourism data collected and analysed for the project. This data is incorporated into the overall *Project Report*[1].

This report commences with some background on tourism in the Granite Belt region. As this research is being conducted in 2020 and 2021 during the COVID 19 pandemic, a discussion of impacts and limitations on the region, and on the research, is included.

In Section 2, the Research Question 'What is the economic role of tourism, and specifically wine tourism, in the regional economy?' is explored by analysing unpublished tourism data collected by Tourism Research Australia. This analysis of secondary data provides the most detailed understanding of tourism and its economic contribution to date. A summary of results is presented in Section 2 of this report, with more detailed data included in Appendix A.

Comments gathered from grape growers and wine makers about tourism are included in Section 3, providing insight to opportunities and barriers to tourism on their properties and in the destination.

[1] Agriculture and Tourism – regional economic contributions and links. A case study of the wine and tourism industries in the Granite Belt region. Project Report.

Background on tourism to Stanthorpe and the Granite Belt Wine Country.

The tourism destination centred on Stanthorpe sits within the Southern Downs Regional Council Local Government Area, which in turn is within the Southern Queensland Country Tourism Region. Also known generically as the ‘Granite Belt’, the Stanthorpe destination is the major tourism area in the ‘belt’ of granite rock country running from north of Stanthorpe to northern New South Wales. For the purposes of this research, it has been important to define the extent of the area to align with data sets available from Tourism Research Australia. The Statistical Local Areas of Stanthorpe and Stanthorpe Region have been used and together we refer to this area as the ‘Granite Belt Destination’. Other broader uses of the term Granite Belt are in common use in the tourism industry and the Australian Bureau of Statistics names a larger Granite Belt Region that extends into New South Wales.

There is a strong history of tourism to Stanthorpe and the region is the main wine tourism destination in Queensland. Nature based attractions of Girraween National Park, Sundown National Park and other natural areas are also popular with visitors. The destination is 2.5 hours’ drive from Brisbane, the main source of visitors. The higher altitude of the destination means that it experiences much colder weather in winter, and sometimes even gets snow, which is an attraction for those wishing to experience the novelty of winter weather.

Tourism Facilities and Attractions

Tourism facilities in the Granite Belt Destination include wineries, while there are up to 59 grape and wine producers in the region, there are around 30 wineries listed on the Southern Downs and Granite Belt web site for visitors, and many of these wineries feature cellar door sales, and some have restaurants or cafes on site. Accommodation is offered by some wineries. Several businesses run winery tours.

Other local tourism accommodation includes motels, lodges, cabins, B&Bs, caravan parks and national park camping. Around 60 accommodation establishments are listed for Stanthorpe and surrounds.

Attractions include locally produced gourmet foods and breweries, including jam, cheese, cider, beer and liqueurs. Galleries, museums, and a Maze are interesting permanent attractions for visitors. Regular markets and annual or bi-annual events also bring visitors to the destination.

A feature of the destination is ‘Trails’ which cluster similar attractions such as wineries and heritage site or cater for activities including walking and bike riding. Maps of these trails are provided for visitors. Of particular relevance to this research is the Strangebird wine trail. A ‘Strangebird’ variety of wine is one which is rare in Australia. Granite Belt wineries have collaborated to plant grape varieties and produce a range of alternative wine varieties. A wine trail featuring 26 wineries has developed since the 2000s (Robinson, 2019). This cluster of wineries differentiates the Granite Belt from all other Australian wine destinations.

The natural environment of the destination is also an important attraction. Girraween National Park is a well-known destination, popular for walking and camping. Sundown National Park is also within the Granite Belt destination.

The Southern Downs Regional Council has provided maps and guides including: Southern Downs and Granite Belt Visitor Guide, 2020/21, Granite Belt Wine Country Visitor Guide, Heritage & Historic Building Trails, Southern Queensland Country Visitor Guide 2020/21, Strangebird Wine Trail Map, Granite Belt Bike Trail Map, (Southern Downs & Granite Belt, 2020). See Figure 1 for a summary of attractions and Figure 2 for the maps and guides.

In Stanthorpe and the Granite Belt, visitors can experience six main activities during four seasons in the year.

1. **National Park splendours**: Girraween national park, Sundown national park, Queen Mary Falls, Glenlyon Dam, Mt Marley Lookout and Summit Walk, The Granite Belt Bike Trail, The Ballandean Pyramid, Bald Rock National Park & Boonoo Boonoo Falls.
2. **Wineries:** Winery tours, behind the scenes wine tour – visiting vineyards and wine tasting, master classes with the Queensland College of Wine and Tourism.
3. **Tastes of the Granite Belt: H**orticultural products such as apples, summer salad vegetables, stone fruits; Granite Belt Brewery, cafes, bistros, and restaurants.
4. **Gourmet delights from local artisans: I**n home kitchens, restaurants, and commercial enterprises such as Jamworks, the Market in the Mountain, Sutton's Juice Factory -Cidery & Shed Cafe, Castle Glen, The Granite Belt Maze and Mini Golf Cafe.
5. **Arts and heritage:** Stanthorpe Art Gallery, Stanthorpe Museum, Quart Pot Creek and The Red Bridge, Wallangarra Railway station and museum.
6. **Events and Festivals:**
   - **Apple and Grape Harvest Festival** – held in even years (2022, 2024 etc.) **end of Feb to first week of March**, celebrated with wonderful music, food and wine.
   - **Grazing the Granite Belt** – Two days event held annually in **mid-May** on gourmet local produce and premium Granite Belt wines and ciders.
   - **Snowflakes in Stanthorpe Festival** – held in uneven years (2021, 2023 etc) in **winter months** (June -July) features snowfields, ice-skating and winter markets.
   - **Australian Small Winemakers Show** – from Australia and NZ small producers, nationally recognised and held annually in **October**.
   - **Granite Belt Art and Craft Trail** – open studios showcase local arts and crafts through classes, demonstrations, and exhibitions, held over two weekends usually in **October**.

Source: Summarised from the Stanthorpe & Granite Belt Visitor Guide

Figure 1. Attractions of the Granite Belt Destination.

Source: Southern Downs and Granite Belt [Maps and Guides]

Figure 2. Maps and Guides for Granite Belt Visitors

Tourism and Wine Tourism Organisations

The overarching regional tourism organisation is Southern Queensland Country Tourism (SQCT). This Destination Management Organisation has over 1,000 members, primarily businesses with direct interaction with visitors or those providing services to tourism. This organisation undertakes destination marketing, industry advocacy and destination partnerships.

Supported by the Southern Downs Regional Council is Southern Downs and Granite Belt Tourism. This organisation undertakes destination marketing, event support and visitor servicing strategies. A web site maintained by Southern Downs and Granite Belt Tourism provides extensive information for visitors to the region. This organisation also operates visitor centres in Warwick and Stanthorpe.

Focused on promoting tourism in Stanthorpe and the Granite Belt region, the Granite Belt Wine Tourism Inc. is a member based organisation which includes tourism businesses, wineries, and support businesses. The web site for this organisation has a focus on wine tourism attractions, other tourism attractions and accommodation in Stanthorpe and surrounds.

The Queensland College of Wine Tourism located in Stanthorpe is a focus for professional development in the region. The college provides education to students and industry members via a diploma program, a school program and industry training. Providing practical training, the college grows grapes, produces wine, and runs a restaurant.

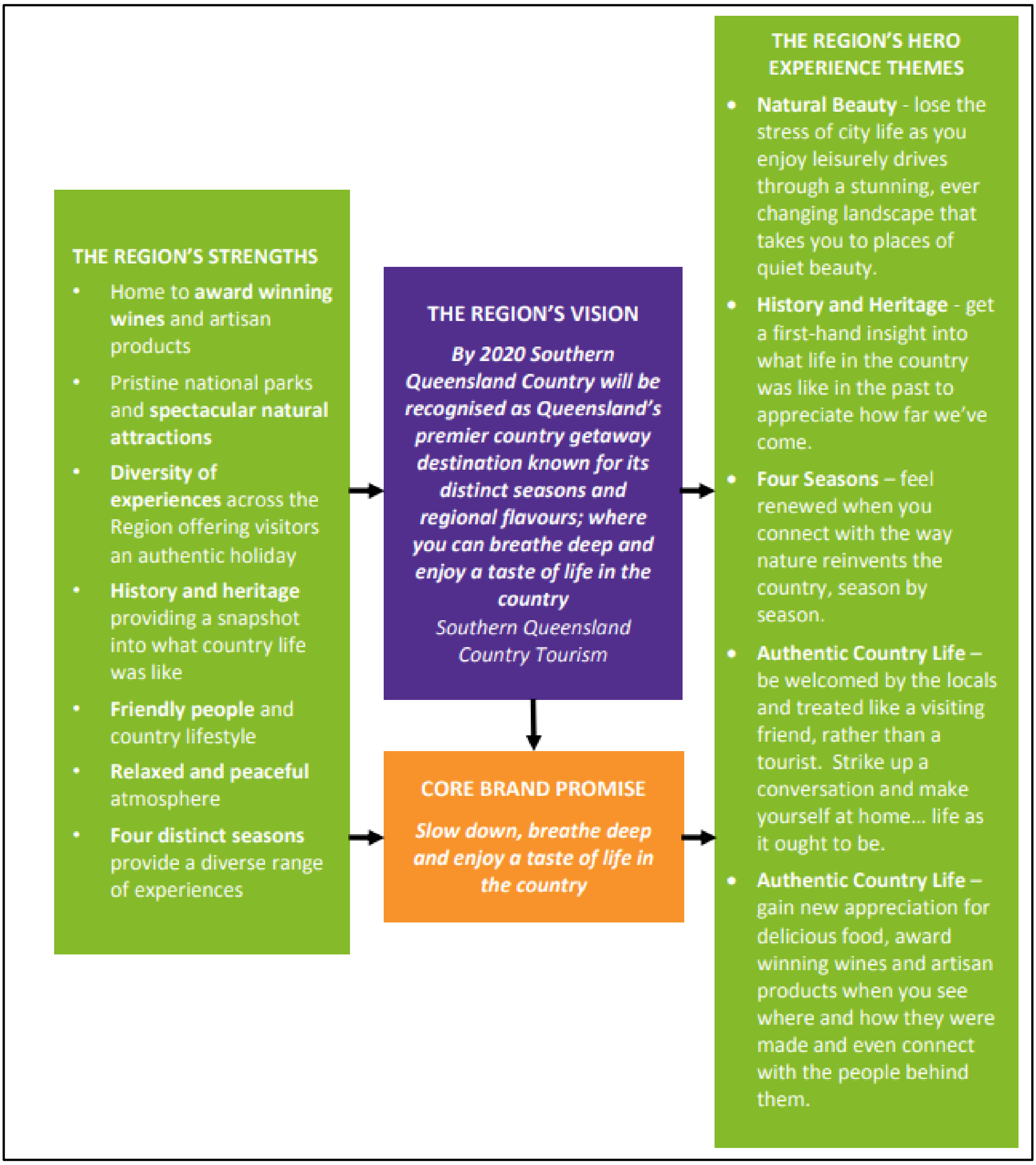
Tourism Reports and Plans

Planning and promotion of tourism in the Southern Queensland Country Tourism Region, Southern Downs Reginal Council area and the Stanthorpe and the Granite Belt destination is underpinned by reports and plans produced in recent years by several government and private organisations. A summary of key reports and plans follows.

Southern Queensland Country Destination Tourism Plan 2014 – 2020.

Published by Southern Queensland Country Tourism and Tourism and Events Queensland.

This is the main destination plan for the tourism region and highlights the Hero Experiences for the region. Figure 3, reproduced from the Plan, presents the region's strengths, the vision for the region and its hero experiences of *Natural Beauty, History and Heritage, Four Seasons and Authentic Country Life.* Strategies in the Plan aim to increase visitor expenditure and target 10 priorities for development. An impact of COVID-19 is that an updated plan has not been produced despite the 2020 'expiry date' of this plan.



Source: Southern Queensland Country Tourism and Tourism and Events Queensland, 2014.

Figure 3. Southern Queensland Country Destination Tourism Plan: Strengths, Vision, Promise and Hero Experiences.

Southern Downs: Tourism Market Research Report 2018

Produced by EarthCheck for Southern Downs Regional Council.

This is primarily a market research report which provides a profile of visitation to the Southern Downs Regional Council area via an analysis of Tourism Research Australia statistics. In addition, the report highlights results of a survey of 2,500 South East Queensland and Northern New South Wales residents (potential visitors) to investigate visitor awareness of the destination and intentions to visit in the next 12 months.

Respondents to the survey were asked to nominate the experiences they associated with the region (from a pre-populated list). Significantly for tourism in the Granite Belt destination, 'Wineries were clearly identified as the experience at the forefront of most visitors' minds, (38%)' (EarthCheck 2018, p.15). Another attraction in the Granite Belt destination, Girraween National Park was the next most recognised experience (23%). The Stanthorpe Apple and Grape Festival and Snow in Winter came in at fourth and fifth on the list of recognised experiences. These results attest to the significance of Stanthorpe and the Granite Belt as a tourism destination within the Southern Downs region.

Southern Downs Regional Council Tourism Strategy 2017-2020

Published by Southern Downs Regional Council

This tourism strategy sets targets to grow the population of the region, total visitors, and job numbers in tourism all by 10% by 2020 and increase average nights of stay by 50% over the same period. An increase in investment in tourism is also targeted.

The five strategic priorities cover both the demand and supply side of tourism development and are:

1. Facilitate and develop quality products, events, and experiences
2. Invest in infrastructure
3. Enhance regional promotion
4. Build a skilled workforce
5. Build effective industry partnerships

Due to the impact of bushfires and drought and then COVID-19, the attention of the Southern Downs Regional Council has been on tourism recovery rather than updating plans.

Impacts of the COVID 19 pandemic on the destination

The COVID-19 pandemic has clearly had had negative impacts on all Australian tourism. The National Visitor Survey for the year ended March 2021 reported that for Australian domestic tourism, overnight spend and trips decreased by 42% and 35% respectively for the year from March 2020. National domestic day trip spending decreased by 35% and international travel was all but ceased, decreasing by 98%. However, by the March quarter 2021, the trend for increasing regional travel was showing up nationally with a 12% increase in regional travel and a 13% increase in intrastate overnight trips (Tourism Research Australia, 2021).

During most of 2020 and 2021, tourism to the broader Southern Queensland Country Tourism Region has been affected by limitations imposed due to the pandemic. International borders to Australia have been closed since March 2020. The Queensland border was closed to interstate travel between early April and mid-July 2020. Border closures to other states have occurred at many other times over 2020 and 2021. Within Queensland, intrastate travel was effectively banned in April and May 2020 and restrictions were selectively lifted after that time (Tourism and Events Queensland, 2021). During 2021, there have been a series of lockdowns, reducing the ability of people to travel within Southeast Queensland.

For the Granite Belt destination, the COVID 19 pandemic has come after some challenging times in 2019 where drought and bushfires reduced visitor numbers. The drought resulted in local water shortages that saw water being trucked into Stanthorpe, and that publicity was not positive for tourism. The drought also led to bushfires, highway closures and other negative publicity, keeping visitors away. Records are kept of visitors at the Stanthorpe Visitor Information Centre, run by Southern Downs and Granite Belt Tourism. While these records are not total visitor numbers to the destination (they represent around 1% of all visitors, see Section 3), it is believed that increases and decreases over time give an indication of changes in visitor numbers in the destination. These records were kindly supplied by Southern Downs and Granite Belt Tourism, see Table 1.

The records show a fall in visitor numbers from September 2019, which coincided with the drought and bushfires. Overall numbers for 2019 were 29% lower than for 2018. Visitor numbers were low from the beginning of 2020 and the visitor centre was closed in March and part of April as the state was locked down due to the pandemic and international travel to Australia ceased. As travel restrictions were eased in mid-2020, the region benefited from being one of the few places that people from Brisbane and other SEQ locations could travel. July 2020 saw the highest numbers of all the records since 2017. As reported by the Southern Downs Regional Council in March 2021, visitor numbers at the visitor information centre the last six months of 2020 'eclipsed' previous years. High visitor numbers have continued for some months in 2021, however numbers have fluctuated due to lockdowns and border closures and fluctuation is likely to continue.

The popularity of regional tourism in Australia, at least for some time periods during the pandemic, has been noted across Australia. Tourism Research Australia (2021, p.2) reports that 'regional destinations within a 2-3 hour drive of capital cities' have seen good domestic visitor numbers. This resulted in visitor spend in regional Australia being higher than pre-pandemic levels for the months of January to March 2021.

Table 1: Stanthorpe Visitor Information Centre – Visitor Records.

	Visitor Records					Percentage difference		
Month	**2017**	**2018**	**2019**	**2020**	**2021**	**2019 vs 2018**	**2020 vs 2018**	**2021 vs 2018**
January	1861	1674	1684	946	1542	1%	-43%	-8%
February	1539	1072	1020	926	1433	-5%	-14%	34%
March	2053	2035	1549	956	1898	-24%	-53%	-7%
April	2208	2828	2380	Closed	3165	-16%		12%
May	2118	2286	1754	60 (Semi Closed)	3012	-23%		32%
June	2075	1752	1806	2285	2842	3%	30%	62%
July	2782	2606	2519	3568	2965	-3%	37%	14%
August	1901	1527	1764	2552		16%	67%	
September	1972	1816	1304	2808		-28%	55%	
October	1603	1762	1133	2479		-36%	41%	
November	1298	1460	648	1482		-56%	2%	
December	1557	1285	902	1511		-30%	18%	
TOTAL	**22967**	**22103**	**15780**	**19513**		-29%	-12%	
June - December		12208	10076	16685		-17%	37%	

Source: Provided by Stanthorpe Visitor Information Centre, Southern Downs and Granite Belt Tourism.

2. Tourism Statistics for the Granite Belt Destination

Introduction

The tourism destination centred on Stanthorpe is the subject of this report. This section of the report highlights visitor profiles and activity and the economic contribution of tourism to the destination. The purpose of this is to understand the background of tourism to the destination and to identify opportunities. The presentation of recent historical data on visitor patterns tells the story of what visitors have chosen to do in the destination in recent years. However, the impact of COVID 19 on the destination has possibly interrupted the historical pattern of use and provided some new directions. Thus, the data analysis covers recent years up until 2019, plus what is available to describe visitor use since then.

In statistical terms, the subject area for the research is the statistical area level 2 (SA2) areas of Stanthorpe plus Stanthorpe Region, as defined by the Australian Bureau of Statistics. For simplicity, these combined SA2s will be termed the 'Granite Belt Destination' throughout this section of the report. These SA2s sit within the broader Southern Queensland Country Tourism Region and the Southern Downs Regional Council Local Government Area.

While Tourism Research Australia regularly collects data down to the SA2 level, it does not publish reports at this level. Most published data is presented for the larger Southern Queensland Country Tourism Region, one of the 13 tourism regions in Queensland, and the Local Government Area of the Southern Downs Regional Council. For the purposes of this research, data collected, but not published, by Tourism Research Australia at the SA2 level was accessed and analysed. This provides the first detailed look at this destination in terms of visitor profiles, activities, and economic contribution.

Firstly, some context for tourism in the Granite Belt Destination is provided by looking at key tourism characteristics of the broader Southern Queensland Country Region and the Southern Downs Regional Council area.

For the Granite Belt Destination, the key characteristics of tourism are summarised. A discussion of the main story on tourism, pre and post COVID observations and possible opportunities is also included. Appendix 1 includes more detailed tables and an explanation of the methodology used in selecting these statistics.

Context

The Southern Queensland Country Tourism Region is one of 13 tourism regions in Queensland. Tourism Research Australia reports on tourism at this regional level. There is also a Tourism Satellite Account (TSA) for Southern Queensland Country, see Figure 4.

The Southern Downs Regional Council area is the Local Government Area in which Stanthorpe and surrounds are located and also includes the larger centre of Warwick and surrounding areas, see Figure 5.

The 'Granite Belt Destination' has been defined for this report to include the SA2 areas of Stanthorpe and Stanthorpe Region, see Figure 6.

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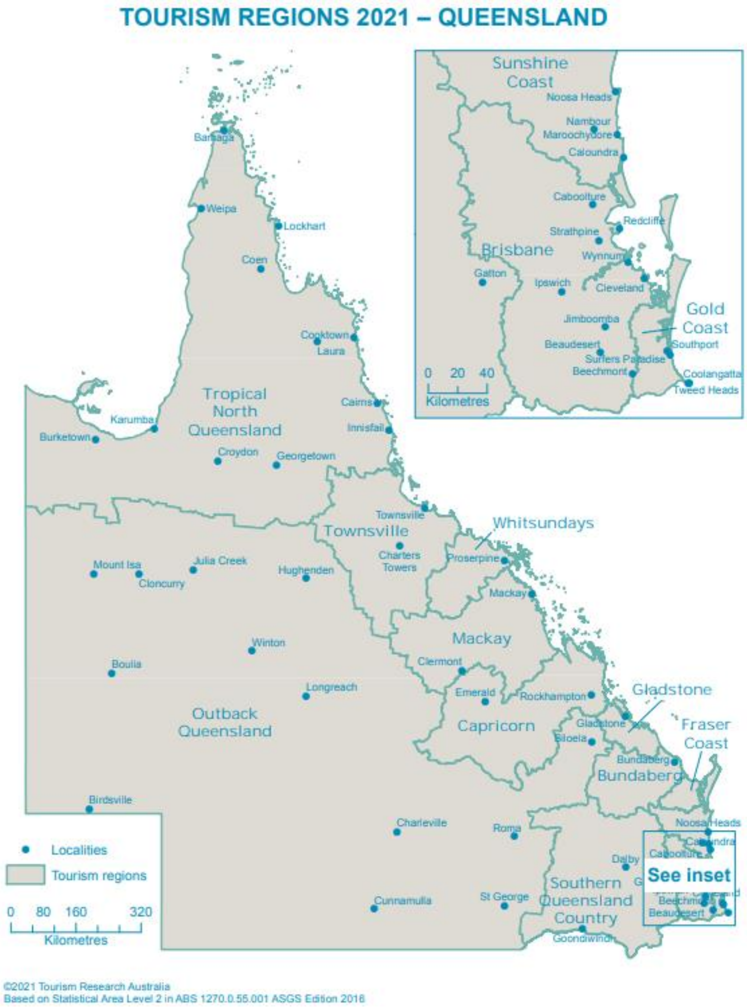
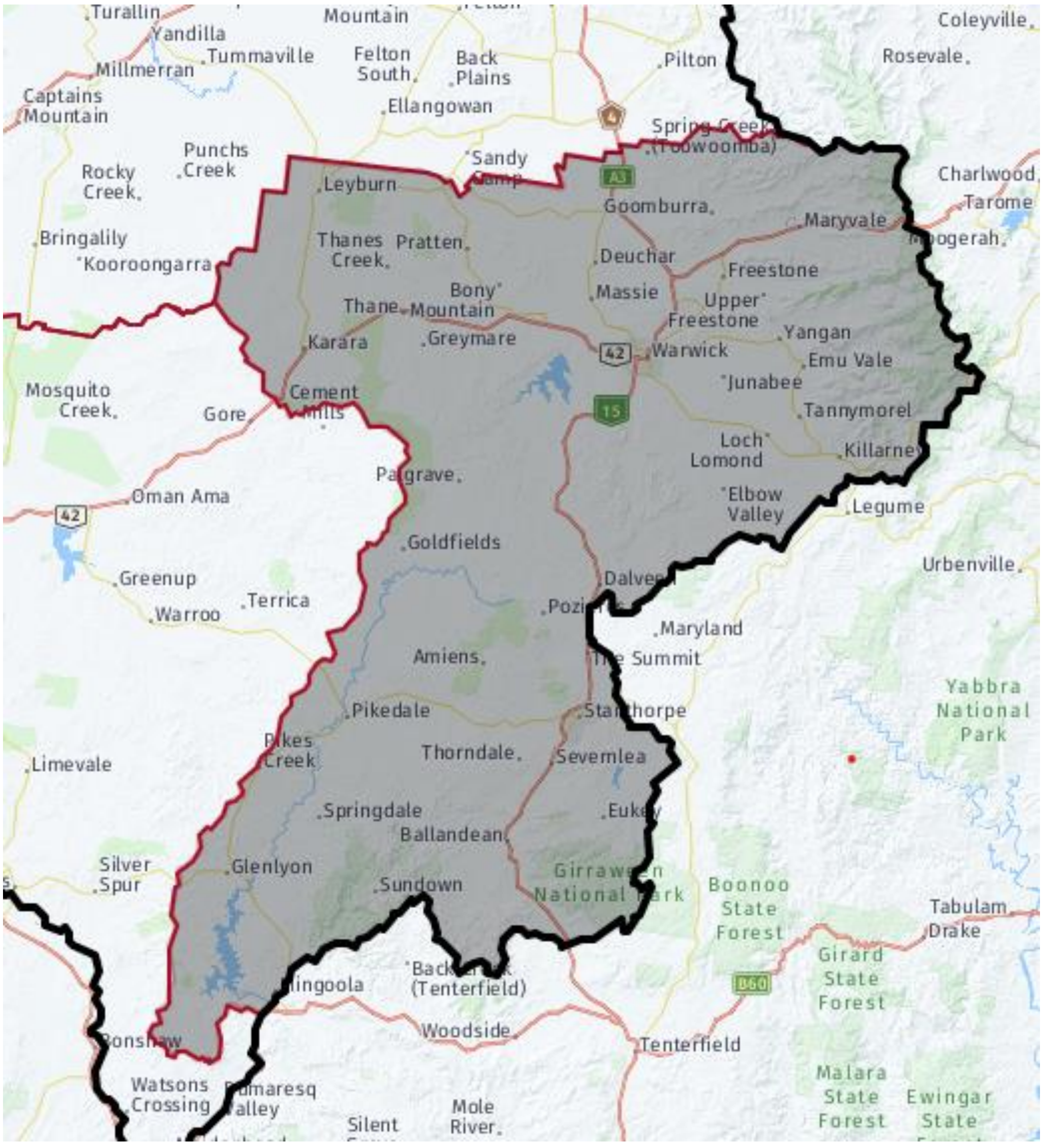


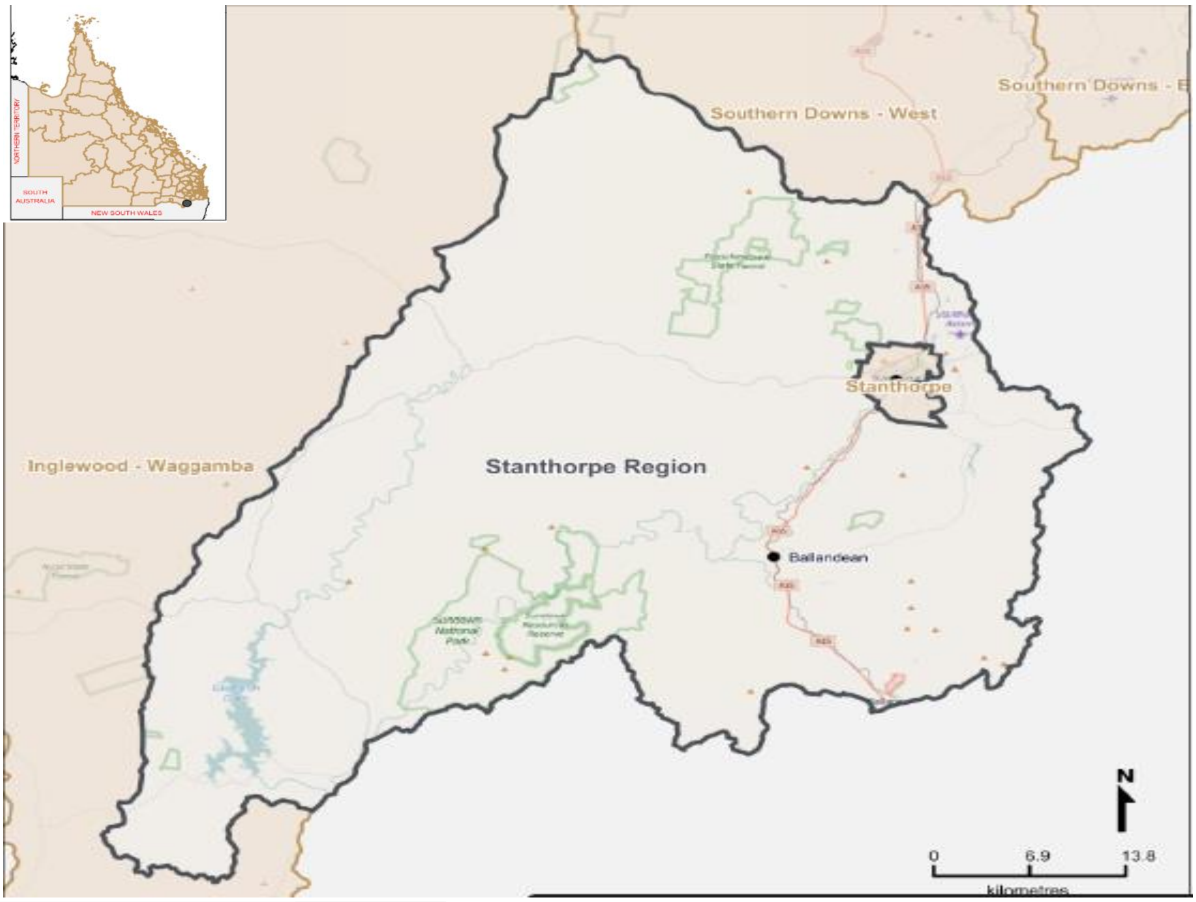
Source: Tourism Regions 2020 ([TRA, 2020](#))

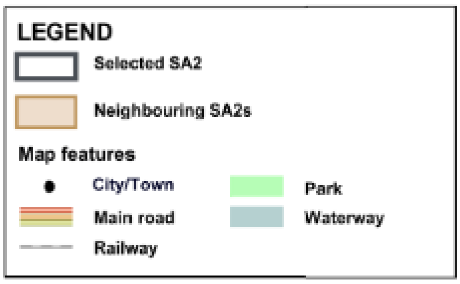
Figure 4. Southern Queensland Country Tourism Region



Source: [About the profile areas | Southern Downs Regional Council area | profile.id]

Figure 5. Southern Downs Region – Local Government Area





SA2 = Queensland statistical areas, Level 2 (SA2)

Source: Queensland Government Statistician's Office. Queensland Treasury (http://www.qgso.qld.gov.au/products/maps/).

Figure 6. Granite Belt Destination: Stanthorpe and Stanthorpe Region - Queensland statistical areas, Level 2 (SA2)

Southern Queensland Country Tourism Region

Tourism pre COVID-19

In the year ending December 2019, (pre COVID-19) this region welcomed 2.19 million domestic overnight visitors – 80% from within Queensland and 20% from the rest of Australia, 56,000 international visitors and 4 million domestic day trip visitors (Tourism and Events Queensland, 2020; Tourism Research Australia, 2021a).

The economic contribution of tourism was measured using a Tourism Satellite Account (TSA). In 2018-19 visitors to Southern Queensland Country contributed $1.38 billion in expenditure and supported 6, 806 jobs directly (Tourism Research Australia, 2021b).

The TSA for Southern Queensland Country provides information on the relationships between ‘Direct’ expenditure by tourists and contribution to gross regional product (GRP), gross value added (GVA) and employment. The TSA also evaluates the ‘Indirect’ contribution of this expenditure to the economy, via the use of output multipliers. The Indirect contribution is generated when expenditure by tourists flows through to other business that support tourism businesses.

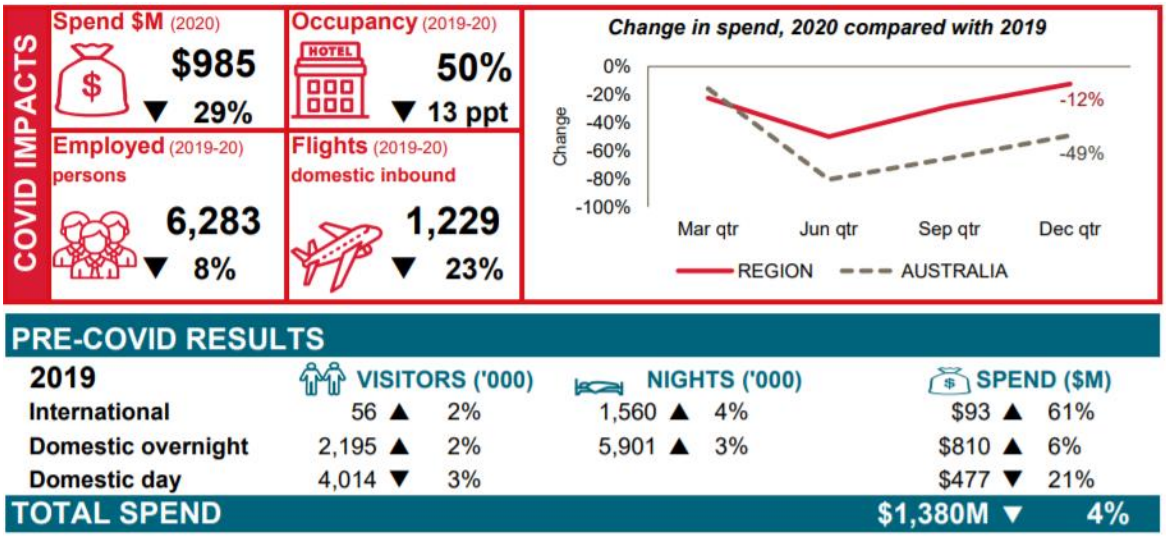
Southern Queensland Country’s total tourism consumption (expenditure by tourists) translated into GRP generated being the 5th highest of all Queensland tourism regions (Tourism and Events Queensland, 2020). Tourism Gross Value Added of $464 million was split between Food services 20%, Retail trade 18% Transport 16%, Recreational activities 14%, Accommodation 13% with the remaining being 19% distributed amongst other industries (Tourism Research Australia, 2021). Intrastate tourists contributed around a half of total expenditures (48% in 2018-2019) followed by domestic day visitors (33%), interstate tourists (11%) and international tourists (7%) (Tourism Research Australia, 2020).

Tourism during COVID-19

Tourism data for Southern Queensland Country for the year ended March 2021 is the most recent published regional information available at the time of writing this report and reflects the first full year of pandemic travel restrictions (Tourism and Events Queensland, 2021).

The Southern Queensland Country region was advantaged at times by being one area to which residents of Brisbane and surrounds could travel when distance limitations were imposed on intrastate travel. Domestic overnight visitor numbers to Southern Queensland Country were 1.8 million, which was 17.7% lower over the year. The largest drop was in interstate visitors (reduced by 59.4%). Brisbane continued to be the largest source of visitors. Overnight visitor expenditure dropped by 7.5% to $631.6 million (offset somewhat by longer trips) (Tourism and Events Queensland, 2021).

Domestic day trip visitor numbers reduced by 19.9% to 3.3 million visits. Day trip tourism expenditure in the region reduced 24.6% to $375.3 million (Tourism and Events Queensland, 2021). Broad impacts of COVID are summarised by Tourism Research Australia (2021c) in Figure 7.



Source: Tourism Research Australia 2021c.

Figure 7. Southern Queensland Country Tourism Regional Profile pre-COVID and COVID impacts.

Southern Downs Regional Council Area

In 2019, this Local Government Area received 380,000 domestic overnight visitors (83% intrastate, 17% interstate), and 544,000 day trip visits. International visitors only totalled 11,000 and it is noted that most international visitors to this area were backpackers or other seasonal workers who stay a relatively long time but are low spenders. Tourists spent $176 million, at an average of $94 per night over all groups (4 year average) (Tourism Research Australia, 2019).

A report prepared in 2018 by EarthCheck for the Southern Downs Regional Council included analysis of TRA visitor data on activities that visitors had chosen in 2017. The most popular activities were 'social activities' (55% of domestic day, 43% of domestic overnight and 25% of international visitors) followed by outdoor/nature activities (17% of domestic day, 17% of domestic overnights and 22% of international visitors) (EarthCheck 2018).

Granite Belt Destination Tourism (Stanthorpe and Stanthorpe Region)

Visitor Numbers

Most visitors to the destination are from Australia. In fact, 73% of domestic overnight visitors are from Queensland. In 2019, there were 148,000 domestic overnight visitors and they stayed for 394,000 nights. This is slightly below the 5-year average for 2015 to 2019 which was 163,000 visitors and 453,000 visitor nights (Appendix 2 – Table 2).

A further 97,000 domestic day trips were made in 2019, again this was somewhat less than the 5-year average for 2015 to 2019, which was 110,000-day trips (Appendix 2 – Table 3).

There were less than 7000 international visitors, but many stayed a long time on working holidays. Thus, the total visitor nights in 2019 was 271,500 (Appendix 2 - Table 4).

Adding these three groups of visitors, around 250,000 people visited the destination in 2019. This was made up of domestic overnight visitors 59%, domestic day trip visitors 39% and international visitors 2%.

Socio demographics

For domestic visitors, the destination attracts older people (36% of visitors are over 55 years of age), and couples with no children in all age groups, and a smaller proportion of families with young children (10% of visitors) (Appendix 3 – Table 5).

International visitors are mainly single (67%), and of younger or midlife age groups, consistent with people on working holiday type travel. International visitors come from over 20 countries, with Taiwan (19%) the United Kingdom (11%) and Italy and France (8%) being the top sources (Appendix 3 – Table 6).

Travel characteristics

Almost 100% of domestic overnight visitors and day trip visitors travel to and within the destination by self-drive car. ‘Holiday’ and ‘visit friends and relatives’ dominate as the reasons for travel (Appendix 4, Table 7-8).

While over 60% of international visitors nominate ‘holiday’ as their reason to visit, ‘employment’ and ‘visit friends and relatives’ are also notable reasons to visit. Self-drive vehicle is also the most popular transport mode for international visitors (Appendix 4 – Table 9).

Length of Stay

For domestic overnight visitors, Granite Belt destination is a short stay destination. Most visitors (88%) stay for between 1 and 3 nights (Appendix 4 – Table 7).

It is a very different story for international visitors. While around 40% stay between 1 and 7 nights (Appendix 4 – Table 8), the remainder stay longer due to working holiday opportunities and in 2019 the average length of stay was 58 days (Appendix 2 – Table 4).

Seasonality

For domestic overnight visitors, the June (April to June) and September (July to September) quarters are the peak periods with similar visitor numbers, and the December (October to December) quarter is somewhat less popular. The March (January to March) quarter consistently has the lowest visitor numbers. Across all seasons, 1 to 2 nights are most popular length of stay and stays over 7 nights are rare (Appendix 5 – Table 10).

The December quarter has become the most popular for domestic day trips in the last couple of years but the pattern before that was for June to be most popular. September is consistently the second most popular quarter with March consistently the lowest visitor season (Appendix 5 – Table 11).

International visitors are more influenced by work opportunities, with only minor variation in total visitors across the March, June, and September quarters, with the destination hosting fewer international visitors in the December quarter (Appendix 5 – Table 12).

Activities

Information on visitor activities in Australia is collected by Tourism Research Australia via the National Visitor Survey (NVS) and International Visitor Survey (IVS). Visitors can nominate multiple activities in these surveys.

For all visitors, social activities including eating out, sightseeing, visiting friends and relatives, shopping for pleasure were the core activities associated with travel and the most popular activities.

Visitors also participated in activities which reflect the particular local attractions and opportunities in the Granite Belt destination. For domestic overnight tourists, the most popular local activities were visiting wineries (26%), followed by bushwalking (21%) and visiting national parks (19%). Visiting markets also attracted 16% of these visitors (Appendix 6 – Table 14).

While visiting wineries (15%) and bushwalking (12%) and visiting national parks (7%) were also the three most popular local activities in the Granite Belt destination for day trippers, obviously lower proportions of these visitors made time to participate in such activities (Appendix 6 – Table 15).

The International Visitor Survey does not record activities at a regional or destination level. Popular activities for international visitors in Australia are included in Appendix 6 (Table 17).

Spending

Tourists spent $79 million per year in the Granite Belt Destination, on average from 2015 to 2018. This was made up of $53 million from domestic overnight visitors, $13 million from domestic day trip visitors and $13 million from international visitors (Appendix 8 – Table 20).

The average expenditure per trip for the largest contributors, domestic overnight visitors, was $317 based on an average per person per night spend of $113. Domestic day trip visitors spent on average $120 when visiting for a day. While the number of international visitors was low, and their spend per night was low at $32, the long average stay of these visitors means they spent on average $1,865 per trip (Appendix 8 – Table 20).

An estimate of total full time equivalent jobs supported by this expenditure has been made by the authors of this report, based on data reported in the Southern Queensland Country regional Tourism Satellite Account (Tourism Research Australia 2021b) (see Appendix 8 for estimate method). This is approximately 553 jobs.

The group of domestic overnight visitors who visited wineries spent $19 million in the Granite Belt destination (Appendix 8 – Table 21). Due to small sample sizes, it is not possible to estimate the spending by day trip and international visitors who visited wineries. Therefore, the estimate of $19 million contribution to the region by winery visitors is conservative. Approximately 133 jobs are supported by this expenditure (see Appendix 8 for estimate method).

Similarly, visitors who visited national parks spent $14 million in the Granite Belt destination (Appendix 8 – Table 21), supporting approximately 98 jobs (see Appendix 8 for estimate method).

These are not mutually exclusive groups because many visitors visited both wineries and national parks.

Discussion

Main trends

In summary, pre COVID 19, the Granite Belt destination had a fairly constant stream of visitors over the last 10 years. Visitation is dominated by people from Queensland, who take day trips or visit for short stays. Visiting the wineries of the region and nature based activities of visiting national parks and bushwalking are the most popular activities, in addition to the usual social activities of eating out, sightseeing, visiting friends and relatives and shopping for pleasure. It must be noted that bushfires in late 2019 and reports of Stanthorpe running out of water during 2019 had a negative impact on visitor numbers before the start of the COVID 19 impacts in 2020

The March quarter consistently has the lowest visitor number of domestic visitors with the June and September quarters, which feature the colder weather and school holidays, the most popular.

While there are relatively few international visitors, these people contribute to the destination by staying longer and working on properties.

Pre vs during COVID tourism

Data currently available for the period since early 2020 is at the regional level for Southern Queensland Country, but not at the SA2 level.

Trends in visitor numbers in the Southern Queensland Country Tourism Region are generally relevant for the Granite Belt destination. Indicative trends based on data from the Stanthorpe Visitor Information Centre were discussed in Section 2.

In summary, the bushfires and then the pandemic have reduced visitor numbers at times over the past two years. There have also been times when visitor numbers have been higher than usual in the destination. The net effect on visitor numbers and expenditure by visitors to the Granite Belt destination is not available from published or unpublished statics yet. Overall, the Southern Queensland Country Tourism Region has suffered a net loss of tourism expenditure over this period, and it is likely that the story for the Granite Belt destination will be the same.

Opportunities suggested by the visitor statistics

The visitor statistics for the Granite Belt destination suggest two types of opportunities to increase visitor numbers to the destination. Adding attractions and experiences may also lead to increased spend per day.

First, are the opportunities to increase tourism within current infrastructure and attractions, making better use of what is already in the destination.

<u>Increase the length of stay/ utilise weekdays</u>

- The length of stay is generally short and focussed on two or three day weekends. Any actions and attractions that can add a day or two to trips would be beneficial to the destination.

<u>Increase visitors in low seasons</u>

- The March quarter is consistently the low season for this destination. Events, competitions, and special interest courses are often successful ways to utilise resources in low seasons.

Second, the visitor statistics suggest gaps in the market in the destination where there are potential opportunities to appeal to new visitor groups, expand attractions, market better and possibly add new attractions.

Visitor demographics

- Families with young children are a small proportion of the visitor numbers (10%). Development of more activities oriented to families may increase this section of the market.
- The current COVID climate has been challenging for small-medium tourism business operators but is also offering opportunities to focus on intrastate markets particularly from Brisbane.

Popular destination activities and marketing them

- Expand within the destination's popular experiences e.g., more wine and food experiences, more outdoor and nature-based activities, national parks, sports, and related events.
- Market better by offering bundles of different packages (accommodation, transport, tour/ activities, dining and entertainment, retail vouchers) that can increase visitor spending to benefit the local business providers. This will also allow better collaboration and cooperation among local business providers rather than being solo competitors (perhaps, using pricing strategies such as load-peak pricing, bundling etc).

Add Something different

- There are some activities not currently offered in the destination that could add to its appeal, for example to international visitors. These could be added in small steps to avoid mis-match with the expectations of visitors. Activities such as more night-time entertainment, indigenous and cultural tourism could be successful.

3. Grape Growers and Wine Makers views on tourism opportunities and challenges

The views and comments presented here are from 16 respondents who were owners or managers of grape growing and wine producing businesses. The businesses surveyed were broadly representative of the different sizes of farms under grapes in the region. Details of the survey are included in the *Economic Report on the Grape and Wine Industries.* The following open-ended questions focussing on tourism were included at the end of the survey (Question 37 – 40).

Question 37. Would you like to increase tourism revenue in your business?

Approximately half the respondents answered ‘Yes’, there was only 1 ‘No’, but half the respondents did not answer this question.

Question 38. What ways have you considered trying to increase tourism for your business? Could you please give an example of what you have tried in the past and/or what do you plan to do in the future?

Most respondents answered this question. Responses were:

- Using social media and online options: Facebook, Instagram, Airbnb
- Focus on the cellar door – expand, add new tasing experiences, make it better for weddings
- Travel to promote the business
- Create new events on the property – including corporate and weddings
- Expand or build new accommodation
- None - too busy

Question 39. How could the Granite Belt Region as a whole increase tourism?

Most respondents answered this question. Responses were:

- Some respondents said no extra marketing effort was needed, there has been an upgrade in last 3 years
- Others recommended an increase marketing, more media coverage, target the Brisbane market
- Improve food offerings, local produce, more restaurants, fine dining,
- Maintain critical mass of cellar doors but also diversify attractions
- More shops open on main street on weekends
- Some respondents noted the positive effect of COVID travel restrictions on visitor numbers to Granite Belt*

* See Section 1 of this report explaining this effect.

Question 40. Are there any obvious barriers to increasing tourism?

Most respondents nominated one or more barriers.

- Lack of food options – not enough cafes and restaurants
- Day trip from Brisbane is too long
- Staff shortages, lack of chefs
- Not enough accommodation
- Unstable water resources

Question 41. What positive or negative feedback have guests provided?

Most respondents offered positive and negative aspects.
Positive

- Friendly people, visitors meet business owners
- Granite landscape – Girraween National Park
- Cold weather, 4 seasons
- Wineries, wine, quality of wine, education about wine
- Some good restaurants
- Lots to do
- Inexpensive
- Scenic
- Accommodation

Negative

- Inconsistency in cellar door wine tasting opening (since COVID)
- Lack of places to eat, not enough restaurants
- Roads are bad
- Immature tourism industry

Question 42. Please suggest up to three of the most useful government actions (possible policy interventions) to assist tourism to the Granite Belt Region. For example, government funded tourism-related infrastructure, travel vouchers, etc., any actions that can benefit the region as a whole?

Most respondents nominated one or more government actions.

- Marketing – not just in Queensland, improve recognition of Queensland wine, promote Queensland wines for the Olympics, advertise state-wide on TV.
- Bring back backpackers
- Support apprentices in hospitality and winemaking
- Support training for staff
- Fix the roads
- Support and funding for local tourism organisations
- State tourism body should promote food and wine, not just beaches.
- Coordinate wine industry development – growers, wine producers, government

Summary

While only half of the respondents said they were interested in increasing tourism revenue from their own operations, the range of options mentioned included: using social media and online options better, add new experiences and events at the cellar door and on the property, expand on site accommodation and travel to promote the business.

Looking to the broader destination, many positives were noted: friendly people, visitors meet business owners, the national park and scenic landscape, cold weather, 4 seasons, wineries, wine, quality of wine, education about wine, some good restaurants and accommodation, lots to do and an inexpensive destination.

Negative perceptions and identifying barriers focused on: lack of dining options, lack of local produce featured in restaurants, staff shortages (including chefs), lack of accommodation, shops closed in the town, unstable water resources and poor road maintenance. Suggestions for useful government actions included: facilitating coordination of industry stakeholders for development, support and funding for local tourism organisations, marketing (destination and wine marketing), assisting to overcome staff shortages, support apprentices and staff training, fix the roads.

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Appendices: Visitor statistics Granite Belt Destination (Stanthorpe and Stanthorpe Region)

Appendix 1: Methodology for selecting visitor statistics

Data from Australia Bureaus Statistics (ABS) and Tourism satellite account (TSA) for regional areas were compiled to present the general economy and tourism economic contributions. Tourism Research Australia publishes Regional Profiles (TRA, 2020) based on data gathered via the International Visitor Survey and the National Visitor Survey. Particularly, the survey results provide statistics on how international visitors or Australian residents travel within Australia (number of trips taken, number of nights spent on a trip, amount spent on a trip at national, state and territory levels).

The visitor profiles (socio-demographics, trip characteristics and visitor spending) of Stanthorpe and Stanthorpe region were produced through accessing The TRA online database using SuperSTAR suite and analysed using descriptive statistics - four-year rolling average. TRA Online contains a range of functions and tools to assist the user to explore tourism data in an online environment. TRA Online Data package gives users access to core data from the International Visitor Survey (International databases – expenditure and trips) and the National Visitor Survey (Domestic databases – day trip, daytrip expenditure, demographics, overnight expenditure, overnight trips, and outbound trips).

We also used TRA data to explore activities of 'visit wineries', 'visit a national or state park', and other main activities and expenditures of the visitors (social, nature-based, sports, tourism/local attractions, arts/heritage and indigenous culture) when they were in the regions. Analysis of activities by length of stay and quarter of the year to explore most popular main and sub-main activities and to estimate importance of attraction or activities were used to propose recommendation types of respective activities could be offered or promoted to encourage visitors to stay longer and/or to overcome the tourism seasonality in the regions.

The regional expenditure data were obtained from TRA REX database. The estimation was for visitors aged 15 years and older. The estimates are for 'average expenditure per person' for a day trip and 'average expenditure per person per night' for domestic and international overnight trips. The analysis is based on a four-year rolling average with the latest data available for 2015-2018.TRA only provides regional expenditure as a rolling four-years average to minimise volatility of the data. Note that small sample size (<40) does not allow generalisation of the results.

The data compiled from ABS, TSA and TRA have provided rich information about the background of destination attractiveness and visitor profiles. Combined with the data gathered from our visitor survey study conducted from July 2020 to May 2021, the information generated from the analysis provides useful insights about the current destination and recommendations for future directions of the Granite Belt.

Appendix 2: Visitor Numbers and Length of Stay

Domestic Overnight Visitors

In 2019, the Granite Belt Destination received 148,000 domestic overnight visitors. This was made up of 115,000 domestic overnight visitors to Stanthorpe and 35,000 domestic overnight visitors to the Stanthorpe region. Visitor nights in 2019 totalled 394,000.

For Stanthorpe, the numbers of domestic visitors and visitor nights were fairly consistent across the 10 years 2010 to 2019, but with higher visitor numbers and nights in 2017 and 2018. Visitor numbers in the Stanthorpe region were more variable, with the highest number in 2019 (Table 2).

For Stanthorpe, there was consistently an average of 2 to 3 visitor nights per visitor, indicating that this is a short stay destination. Two visitor nights per visitor was the average for the five years to 2019. The 5-year average to 2019 was marginally higher (15% for visitor numbers and 11% for visitor nights) than the 10-year average for Stanthorpe. Average visitor nights in the Stanthorpe region ranged between 2 to 5 over the ten years, and consistently were a night or two higher than for Stanthorpe. A similar recent trend was shown for the Stanthorpe region, with the 5-year average to 2019 being marginally higher (19% for visitors and 25% for visitor nights respectively) than the 10-year average.

As 52% of visitors nominated ‘day of the week returned’ was Sunday, this suggests midweek has lower visitor numbers than weekends (Appendix 4 - Table 7).

Table 2: Domestic overnight visitors to Granite Belt Destination - Stanthorpe and Stanthorpe Region

NVS Year	Stanthorpe				Stanthorpe region				Total GB Destination			
	Sample	Visitors (000)	Visitor Nights (000)	Average visitor nights	Sample	Visitors (000)	Visitor Nights (000)	Average visitor nights	Sample	Visitors (000)	Visitor Nights (000)	Average visitor nights
2010	35	115	306	3	11	28	73	3	46	143	379	3
2011	31	99	209	2	7	21	91	4	38	120	300	2
2012	41	103	323	3	9	17	75	4	50	120	398	3
2013	42	106	274	3	9	17	58	3	51	124	331	3
2014	29	88	266	3	3	9	23	3	32	97	289	3
2015	44	140	343	2	10	29	133	5	52	164	476	3
2016	53	131	248	2	11	25	68	3	64	156	317	2
2017	56	162	539	3	11	19	42	2	67	181	581	3
2018	50	142	352	2	13	27	147	5	62	168	499	3
2019	51	115	248	2	17	35	147	4	67	148	394	3
10-year average #		120	311	3		23	86	4		142	397	3
2010 -2014 average #		102	276	3		18	64	3		121	340	3
2015 -2019 average #		138	346	2		27	107	4		163	453	3
2015 - 2018 average #		144	371	3		25	98	4		167	468	3

Domestic Day Trips

In 2019, 97,000 domestic day trips were made to the Granite Belt destination, comprised of up of 89,000 day trips to Stanthorpe and just 9,000 day trips to the Stanthorpe region. Domestic day trip visitor numbers have fluctuated across the 10 years 2010 to 2019, with higher visitor numbers in 2016 and 2018 for Stanthorpe and in 2014 for Stanthorpe region. For Stanthorpe, the 5-year average to 2019 was marginally higher (19%) than the 10-year average. An opposite trend was shown for Stanthorpe region, with the 10-year average marginally higher (13%) than the 5-year average to 2019. In total, the latest 5-year average was 14% higher than the 10-year average. (Table 3).

Table 3: Domestic daytrips visitors to Granite Belt Destination - Stanthorpe and Stanthorpe Region

NVS Year	Stanthorpe		Stanthorpe Region		GB Destination Total	
	Sample	Daytrips (000)	Sample	Daytrips (000)	Sample	Daytrips (000)
2011	6	113	0	0	6	113
2012	6	48	1	9	7	57
2013	8	91	1	7	9	98
2014	5	37	3	61	8	97
2015	9	91	2	29	11	121
2016	10	106	1	6	11	112
2017	5	47	2	15	7	62
2018	17	155	0	0	17	155
2019	11	89	1	9	12	97
10-year average #		78		14		91
2010 -2014 average #		58		15		73
2015 -2019 average #		98		12		110
2015 -2018 average #		100		13		113

International visitors

In 2019, there were just 6,400 international visitors to the Granite Belt destination, made up of 5,900 visitors to Stanthorpe and 500 international visitors to the Stanthorpe region. The significant characteristic of international visitation to the destination is that many visitors are on working holidays and thus stay a relatively long time.

For Stanthorpe, international visitors and visitor nights were fairly consistent across the 10 years 2010 to 2019, but with higher visitor numbers in 2017 and 2018 and higher visitor nights in 2015, 2017 and 2018. The average visitor nights for the 5 years to 2019 was 58 nights. This latest 5-year average was marginally higher (15% for visitor numbers and 26% for visitor nights) than the 10-year average for Stanthorpe. Conversely, an opposite trend was shown for Stanthorpe region, with the 10-year average marginally higher (6% and 10% respectively) than the latest 5-year average (Table 4).

Table 4: International visitors to Granite Belt Destination - Stanthorpe and Stanthorpe Region

IVS Year ending	Stanthorpe				Stanthorpe Region				GB Destination Total			
	Sample	Visitors	Visitor Nights	Average visitor nights	Sample	Visitors	Visitor Nights	Average visitor	Sample	Visitors	Visitor Nights	Average visitor nights
2010	43	5,440	171,068	31	4	555	1,143	2	47	5,995	172,210	34
2011	44	4,371	158,617	36	5	572	2,431	4	49	4,943	161,048	41
2012	35	3,426	209,938	61	11	1,345	62,184	46	46	4,772	272,122	107
2013	40	4,078	203,322	50	5	558	2,092	4	45	4,635	205,414	54
2014	49	5,791	319,550	55	2	176	456	3	51	5,966	320,006	58
2015	49	5,240	376,564	72	7	628	26,989	43	56	5,868	403,554	115
2016	43	5,271	294,006	56	1	118	118	1	44	5,389	294,124	57
2017	46	7,494	371,465	50	4	686	13,030	19	50	8,180	384,495	69
2018	50	7,436	502,615	68	5	869	5,084	6	55	8,305	507,699	73
2019	32	5,951	260,893	44	3	515	10,584	21	35	6,466	271,477	64
10-year average #		5,450	286,804	52		602	12,411	15		6,052	299,215	67
2010 - 2014 average #		4,621	212,499	47		641	13,661	12		5,262	226,160	59
2015 - 2019 average #		6,278	361,109	58		563	11,161	18		6,842	372,270	76
2015 - 2018 Average #		6,360	386,163	61		575	11,305	17		6,936	397,468	78

Appendix 3: Socio demographic characteristics

Domestic overnight and day trip visitors

Based on the four-year rolling average (2016 to 2019), domestic overnights and day trip visitors were mostly from Queensland (83%). There were more male visitors (59%) than female visitors (41%).

The region attracts visitors in the higher age groups and notably, 36% of domestic visitors were aged 55 plus. Another 25% of domestic visitors were between 40 and 54 years old while around 14% were between 30 and 39 years old. Interestingly, the 20-24 and 45-49 age groups were dominant for day visitors. Lifecycle stages for all domestic visitors featured: Young/ midlife couple, no children (19%), Parents with young children (10%) and Older married visitors – Working (14%) and Non-working (12%), which together made up more than 50% of domestic visitors.

Around 38% of total visitors earned above $70,000 annually with two-thirds (68%) working either full time (47%) or part-time (21%).

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Table 5: Socio-demographics (Domestic overnight and day visitors)

SOCIO-DEMOGRAPHICS (Four-year average 2016 to 2019)	OVERNIGHT '000 (Total = 164,000)		DAY TRIP '000 (Total = 107,000)		TOTAL '000 (Total = 271,000)		Total '000	% of total
	Stanthorpe	Stanthorpe region	Stanthorpe	Stanthorpe region	Stanthorpe	Stanthorpe region		
	84%	16%	97%	3%				
Gender								
Male	80	18	57	6	137	24	160	59%
Female	58	9	43	2	100	10	111	41%
Home States								
New South Wales	21	4	17	-	38	-	38	14%
Queensland	114	21	82	8	197	29	225	83%
Age								
15-19	11	1	4	-	15	-	15	6%
20-24	8	2	17	-	24	-	24	9%
25-29	10	3	4	-	14	-	14	5%
30-34	19	3	7	-	26	-	26	9%
35-39	10	2	4	-	14	-	14	5%
40-44	13	5	7	2	20	7	27	10%
45-49	5	1	14	2	19	3	22	8%
50-54	12	1	8	-	20	-	20	7%
55+	51	10	34	3	85	13	98	36%
Marital status								
Single	34	9	28	-	62	-	62	23%
Part of a couple	103	18	71	8	175	25	200	74%
Lifecycle								
Young single living at home	11	2	-	-	-	-	0	0%
Young single living alone or in shared accommodation	1	1	4	-	5	-	5	2%
Midlife single	7	1	4	-	11	-	11	4%
Young/midlife couple, no kids	27	2	23	-	51	-	51	19%
Parent with youngest child aged 5 or less	18	5	10	-	27	-	27	10%
Parent with youngest child aged 6-14	12	4	4	4	16	8	24	9%
Parent with youngest child aged 15+ still living at home	12	0	7	4	19	4	23	9%
Older working single	3	2	9	-	13	-	13	5%
Older non-working single	8	1	8	-	15	-	15	6%
Older working married person	17	2	20	-	37	-	37	14%
Older non-working married person	22	5	9	-	31	-	31	12%
Annual household income								
$1-$9,999	1	-	-	-	-	-	-	-
$10,000-$24,999	4	1	1	-	5	-	5	2%
$25,000-$39,999	6	3	7	-	13	-	13	5%
$40,000-$54,999	10	1	5	2	14	3	17	6%
$55,000-$69,999	9	3	8	-	17	-	17	6%
$70,000-$84,999	12	1	12	-	24	-	24	9%
$85,000-$99,999	5	2	-	-	-	-	-	-
$100,000-$114,999	2	0	3	2	5	2	7	3%
$115,000-$129,999	9	-	4	2	13	-	13	5%
$130,000-$149,999	6	-	3	-	8	-	8	3%
$150,000-$174,999	5	2	6	-	11	-	11	4%
$175,000-$199,999	3	1	4	-	7	-	7	3%
$200,000+	15	5	9	2	24	7	30	11%
Employment								
Working full time	62	12	48	6	110	18	128	47%

Working part time	22	7	26	2	48	8	57	21%
Unemployed and looking for work	3	-	2	-	5	-	5	2%
Retired or on a pension	33	6	13	-	46	-	46	17%
Mainly doing home duties	4	1	2	-	6	-	6	2%
Studying	12	-	9	-	21	-	21	8%

International visitors

Over the four years 2016 to 2019, almost 60% of international visitors were female. Most visitors (67%) were travelling as singles. In terms of lifecycle, travellers who were single and with no children and in the younger age groups dominated, with 23% being young singles, 17% young part of a couple (no children) and 33% being midlife single. This is consistent with the demographics of travellers on working holidays.

International visitors came from more than 20 countries. The dominant sources were Taiwan (19%), United Kingdom (11%), France and Italy (8%), United States of America (8%), Japan (6%) and Korea (5%).

Table 6: Socio-demographics international visitors

SOCIO-DEMOGRAPHICS (Four-year average from 2016 to 2019)	INTERNATIONAL VISITORS (Total = 7,085)	
	Stanthorpe (92%)	Stanthorpe region (8%)
Gender		
Male	2,702	311
Female	3,836	236
Country of origin		
New Zealand	263	263
Japan	400	96
Hong Kong	127	-
Malaysia	200	-
Indonesia	34	-
Taiwan	1350	24
Thailand	18	-
Korea	379	-
China	9	-
Another Asia	10	-
United States of America	578	24
Canada	54	-
United Kingdom	744	-
Germany	303	41
Scandinavia	164	-
France	607	30
Italy	556	-
Netherlands	169	24
Switzerland	115	30
Another Europe	280	14
Other Countries	178	-
Age		
15-19	304	-
20-24	1610	38
25-29	2180	141
30-34	655	24
35-39	389	-
40-44	72	-
45-49	220	-

50-54	-	263
55+	-	80
Marital status		
Single	4424	316
Part of a couple	2114	231
Lifecycle		
Young single living at home	1515	38
Young single living alone or in shared accommodation	291	
Midlife single	2197	165
Young/midlife couple, no kids	1116	-
Parent with youngest child aged 5 or less	90	-
Parent with youngest child aged 6-14	125	-
Parent with youngest child aged 15+ still living at home	165	-
Older working single	210	113
Older non-working single	210	-
Older working married person	469	142
Older non-working married person	149	89

Appendix 4: Travel characteristics

Domestic Overnight Visitors

Domestic overnight visitors to the combined Granite Belt Destination came from within Queensland (73%) and other states (27%). Almost 100% of travel to the region was by self-drive vehicle. Visiting for holiday (50%) and visiting friends and relatives (31%) dominated travel reasons. Accommodation chosen was evenly split between commercial and private accommodation. Most domestic overnight visitors stayed between 1 and 3 nights. The most popular activities were social activities, see below for more detail on visitor activities.

Table 7: Travel characteristics, Domestic overnight visitors

TRAVEL CHARACTERISTICS (Four-year average 2016 to 2019)	DOMESTIC OVERNIGHT '000 (Total = 164,000)	
	Stanthorpe (84%)	Stanthorpe region (16%)
Reason		
Holiday	64	19
Visiting friends or relatives	48	4
Business	21	2
Other	2	-
In transit	2	2
Transport used on trip		
Aircraft	1	1
Self-drive vehicle	135	26
Other transport	1	0
Activities		
Outdoor/nature	44	16
Active outdoor/sports	21	11
Arts/heritage	21	2
Local attractions/tourist activities	52	7
Social activities	117	22
Other activities	2	-
None of these	9	1
Not asked	1	0
Day of week returned from trip		
Sunday	52	10
Monday	17	5
Tuesday	17	1

Wednesday	7	2
Thursday	13	2
Friday	1	1
Saturday	15	4
Month returned from trip		
January	11	1
February	7	1
March	10	0
April	11	7
May	11	3
June	13	1
July	14	1
August	12	3
September	11	5
October	**20**	1
November	1	1
December	8	3
Interstate or intrastate trip		
Interstate	35	8
Intrastate	103	19
Accommodation		
Commercial Accommodation	67	8
Private Accommodation	70	18
Travel party		
Travelling alone	32	5
Adult couple	41	7
Family group - parents and children	21	6
Friends or relatives travelling together - with children	7	3
Friends or relatives travelling together - without children	26	5
Business associates travelling together - without spouse	8	-
Non-school sporting group/community group or club	1	1
Length of stay		
1 night	52	8
2 nights	52	7
3 nights	21	5
4 - 7 nights	12	4
8 - 14 nights	1	2
15 - 30 nights	-	1
31 or more nights	1	-

Domestic Day Visitors

Most domestic day visitors to the combined Granite Belt Destination were from Queensland (76%), travelled by self-drive vehicle (87%), and were either visiting for a holiday (41%) or visiting friends or relatives (33%). Social activities dominated, see below for more detail on visitor activities.

Table 8: Travel characteristics, Day trip visitors

TRAVEL CHARACTERISTICS (Four-year average 2016 to 2019)	DAY TRIP VISITORS '000) (Total = 107,000)	
	Stanthorpe (97%)	Stanthorpe region (3%)
Reason		
Holiday	40	4
Visiting friends or relatives	34	2
Business	5	2
Other	20	-
Transport used on trip		
Self-drive vehicle	94	8
Other transport	5	-
Activities		
Outdoor/nature	13	4
Active outdoor/sports	2	6
Arts/heritage	5	-
Local attractions/tourist activities	23	-
Social activities	82	6
Other activities	1	-
None of these	10	2
Not asked	4	-
Day of week returned from trip		
Sunday	13	2
Monday	13	-
Tuesday	11	-
Wednesday	6	2
Thursday	11	2
Friday	22	-
Saturday	23	2
Month returned from trip		
January	2	4
February	9	-
March	4	-
April	3	-
May	10	-
June	11	4
July	12	-
August	2	-
September	15	-
October	8	-
November	14	-
December	10	-
Interstate or intrastate trip		
Interstate	17	-
Intrastate	82	8

International Visitors

Around 64% of international visitors were on holiday and 81% were travelling as independent travellers when stopping over at Stanthorpe and Stanthorpe region. Around 40% identified as ‘backpackers’ (staying at least one night in backpacker accommodation).

Most international visitors stayed between 1-7 nights or 31 nights or more (working and holiday).

Table 9: Travel characteristics (International visitors)

TRAVEL CHARACTERISTICS (Four-year average 2016 to 2019)	INTERNATIONAL VISITORS (Total = 7,085)		Total	% of total
	Stanthorpe	Stanthorpe region		
	92%	8%		
Reason				
Holiday	4,600	278	4,877	69%
Visiting friends or relatives	917	89	1,006	14%
Business	31	113	144	2%
Employment	965	24	989	14%
Education	28	14	43	1%
In transit	38	30	67	1%
Transport used on trip				
Aircraft	582	24	606	9%
Self-drive vehicle	4,870	453	5,323	75%
Other transport	1,356	70	1,426	20%
City of arrival				
Sydney	1607	105	1,713	24%
Melbourne	442	40	482	7%
Brisbane	3367	358	3,725	53%
Perth	58	14	72	1%
Adelaide	29	-	29	0%
Darwin	65	-	65	1%
Townsville	-	30	30	0%
Cairns	241	-	241	3%
Gold Coast	728	-	728	10%
Accommodation				
Commercial Accommodation	4,313	263	4,576	65%
Private Accommodation	2,306	284	2,590	37%
Length of stay				
1- 7 nights	2,632	386	3,018	43%
8 - 14 nights	416	-	416	6%
15 - 30 nights	1,104	24	1,128	16%
31 or more nights	2,917	24	2,941	42%
Travel party				
Unaccompanied traveller	4,213	366	4,580	65%
Adult couple	833	150	983	14%
Family group - parent(s) and children	158	-	158	2%
Friends and/or relatives travelling together	1334	30	1,364	19%
Group and package				
Group tour	194	113	307	4%
Non group tour	6344	434	6,778	96%
Type of group tour				
Special interest group tour	119	-	119	2%
Business or convention group tour	113	-	113	2%
Not applicable	4931	306	5,236	74%
Not asked	1488	129	1,616	23%

Backpackers				
Backpackers	2630	188	2,818	40%
Non-backpackers	3907	359	4,267	60%
Free and independent traveller (FIT)				
Free and independent traveller (FIT)	5352	396	5,749	81%
Non-Free and independent traveller (FIT)	1186	151	1,336	19%

Appendix 5: Seasonality and Length of Stay

Domestic Overnight Visitors

For domestic overnight visitors, June (April to June) and September (July to September) quarters are the peak periods with similar visitor numbers and the December (October to December) quarter somewhat lower. The March (January to March) quarter is the lowest season for Stanthorpe and Stanthorpe region.

The pattern of visitor nights across these seasons shows longer stays in the June quarter. However, across all seasons, 1 to 2 nights are most popular and stays over 7 nights are rare.

Table 10: Domestic overnight visitor numbers - length of stay by quarter of the year (2016-2019)

Regions	Length of stay	Visitors (000) in quarter of the year Four-year average (2016 -2019)					Percentage of total visitors
		March	June	September	December	Total	
Stanthorpe	1 night	**11.294**	10.123	10.873	8.328	40.617	**25%**
	2 nights	6.120	12.140	11.202	**17.902**	47.364	**29%**
	3 nights	3.572	5.746	**7.922**	3.880	21.120	**13%**
	4 - 7 nights	3.598	**6.852**	4.844	3.825	19.119	12%
	8 - 14 nights	**2.202**	0.000	1.734	0.623	4.559	3%
	15 - 30 nights	**1.088**	0.644	0.437	0.565	2.735	2%
	31 or more nights	0.000	0.000	0.184	**2.062**	2.247	1%
Total		27.875	35.505	37.195	37.186	137.760	84%
Stanthorpe Region	1 night	0.535	2.043	**2.969**	0.626	6.172	4%
	2 nights	0.000	2.563	**3.200**	1.030	6.793	4%
	3 nights	0.494	**2.743**	0.450	1.377	5.063	3%
	4 - 7 nights	0.403	0.650	1.115	**1.280**	3.448	2%
	8 - 14 nights	0.000	**1.786**	0.000	0.000	1.786	1%
	15 - 30 nights	0.948	**1.326**	0.331	0.507	3.112	2%
	31 or more nights	0.000	0.000	0.000	0.000	0.000	0%
Total		2.379	11.111	8.064	4.819	26.373	16%
GB Destination Total		30.254	46.616	45.259	42.005	164.134	100%
Highest quarter for each length of stay shown in bold							

Domestic Day Trips

The seasonal distribution of domestic day trips, based on 4-year rolling averages (e.g., 2016- 2019), shows that the December quarter has become peak season for day-trippers in the two most recent 4 year periods. However, the June and December quarters have vied for peak season over the ten year time span, with September consistently in second place. The March quarter is consistently the lowest season for Stanthorpe and Stanthorpe region.

Table 11: Domestic day trip numbers by the quarter of the year

Visitors (000) in quarter of the year, Four-year average	March	June	September	December	Total
Year ending December 2012 - Year ending December 2015	10.877	**32.141**	30.968	19.141	93.126
Year ending December 2013 - Year ending December 2016	11.692	**42.082**	33.648	22.514	107.012
Year ending December 2014 - Year ending December 2017	7.310	**41.378**	32.317	25.237	98.105
Year ending December 2015 - Year ending December 2018	17.175	34.267	30.195	**46.966**	112.568
Year ending December 2016- Year ending December 2019	25.270	27.272	28.749	**42.354**	106.740
Highest quarter for each period shown in bold					

International visitors

The visit pattern for international travellers is influenced by work availability. There was only minor variation in total visitors across the March, June, and September quarters, with the destination hosting fewer international visitors in the December quarter.

While 35% of international visitors stay up to one week, the majority stay longer, with 38% staying 31 nights or more.

Table 12: International visitor numbers - length of stay by the quarter of the year (2016-2019)

Regions	Length of stay	Visitors in quarter of the year Four-year average (2016 -2019)					Percentage of total visitors
		March	June	September	December	Total	
Stanthorpe	1- 7 nights	857	379	**903**	491	2632	35%
	8 - 14 nights	75	79	**176**	85	416	5%
	15 - 30 nights	246	**339**	326	190	1103	14%
	31 or more nights	585	**1064**	784	482	2916	38%
Total		**1765**	**1862**	**2191**	**1250**	**7068**	**93%**
Stanthorpe Region	1- 7 nights	119	110	14	**142**	385	5%
	8 - 14 nights	0	0	0	0	0	0%
	15 - 30 nights	**137**	0	0	0	137	2%
	31 or more nights	**24**	0	0	0	24	0%
Total		280	110	14	142	547	7%
GB Destination Total		2045	1972	2205	1392	7615	100%
Highest quarter for each length of stay shown in **bold**							

Appendix 6: Visitor Activities

Domestic Visitors

Detailed exploration of visitor activity data was undertaken to paint a picture of the most popular activities for visitors to the Granite Belt Destination. Numerous possible visitor activities available in Australia are recorded by Tourism Research Australia in the National Visitor Survey (NVS) of domestic visitors (overnight and day trip). These activities, shown in Table 13 (from the NVS) are grouped into five main types of domestic visitors' activities. Not all these activities are available in the Granite Belt Destination.

Table 13: National Visitor Survey visitor activities grouped – Domestic Visitors

Outdoor or nature activities	Sports or active outdoor activities	Arts, heritage or festival activities	Local attractions or tourist activities	Anything else, such as social activities
1. go to the beach (incl. swimming) 2. visit national parks / state parks 36. go bushwalking, or on rainforest walks 3. visit botanical or other public gardens 4. go whale / dolphin watching (in the ocean) 6. visit farms 40. visit the reef	37. go scuba diving 41. go snorkelling 45. go surfing 46. do any water activities / sports (e.g., sailing, windsurfing, water kayaking, water skiing, white water rafting etc) 7. go fishing 8. play golf 9. play other sports 10. do any other outdoor activities (e.g., horse riding, rock climbing, bungee jumping, four-wheel driving, reef walking etc) 11. (exercise / gym / swimming at a local pool or river or creek) 47. go cycling 44. go snow skiing	12. attend theatre, concerts or other performing arts 13. visit museums or art galleries 14. visit art / craft workshops / studios 15. attend festivals / fairs or cultural events 16. experience aboriginal art / craft and cultural displays 17. visit an aboriginal site / community 18. visit history / heritage buildings, sites or monuments	19. visit amusements / theme parks 20. visit wildlife parks / zoos / aquariums 21. go on guided tours or excursions 38. go to markets (street / weekend / art / craft markets) 22. go on tourist trains 23. visit industrial tourism attractions (e.g. mines) 24. visit wineries 42. visit a health spa or sanctuary / well-being centre 43 visit or stay on an island 35. go on a charter boat / cruise / ferry ride 54. visit farm gates 55. visit food markets 56. visit breweries 57. visit distilleries	25. visit friends & relatives 26. (eat out / restaurants) 27. (movies / videos – NOT at cinema) 28. go to pubs, clubs, nightclubs etc 29. visit casinos 30. attend an organised sporting event 31. (go shopping (pleasure)) 32. (just walk or drive around / taking in the sights / general sightseeing) 33. go on a day trip to another place **(FOR OVERNIGHT VISITORS ONLY)** 34. (go on picnics / BBQ's) 48. attend movies / cinema ——— 98. Other activities (**SPECIFY**) 97. None of these

Source: Tourism Research Australia

Domestic overnight visitors

Visitors generally participate in more than one activity when in the destination, so the numbers and percentages in Table 14 reflect this multiple activity pattern. Most domestic overnight visitors (85%) engaged in the social activities associated with travelling, including eating out, sightseeing, and shopping, with 37% visiting friends and relatives in the area.

In terms of activities selected which reflect the particular attractions in the destination, the most popular was visiting wineries (26%), followed by bushwalking (21%) and visiting national parks (19%). This is not a surprising result for this destination at present. Of the other attractions in the destination, markets (food and other) attracted 16% of visitors while a smaller number of visitors participated in a range of local attractions, arts and heritage and sport activities.

Table 14: Activities undertaken by Domestic Overnight Visitors (4-year average 2016 to 2019)

Activities	Number of Visitors '000	% of Visitors
Go bushwalking/rainforest walks	34	21%
Visit national parks/state parks	31	19%
Visit farms	12	7%
Total Outdoor/ Nature or nature based trips	**61**	37%
Fishing	6	4%
Exercise, gym or swimming	9	5%
Water activities / sports	5	3%
Play other sports	5	3%
Other outdoor activities	8	5%
Total Active outdoor sports	**32**	**20%**
Visit museums or art galleries	11	7%
Attend festivals, fairs, or cultural events	10	6%
Visit history/heritage buildings, sites, or monuments	5	3%
Total Arts/ heritage	**23**	**14%**
Visit wineries (agri-tourism)	43	26%
Go to markets	19	12%
Visit industrial tourist attractions	9	5%
Visit food markets	7	4%
Total local attractions/ tourist activities	**59**	**36%**
Eat out at restaurant and/or cafe	98	60%
Visit friends & relatives	60	37%
Sightseeing/looking around	39	24%
Pubs, clubs, discos etc.	29	18%
Go shopping for pleasure	23	14%
Picnics or BBQs	14	9%
Total Social Activities	**139**	**85%**

Domestic Day Trip Visitors

Visitors generally participate in more than one activity when in the destination, so the numbers and percentages in Table 15 reflect this multiple activity pattern. The activities undertaken by domestic day trip visitors in the Granite Belt Destination are reported based on a 4 year average of NVS data for the Stanthorpe and Stanthorpe regions.

Social activities are the most common activities underpinning a day trip to the destination, with 82% of day trippers participating. These include eating out (50%) and visiting friends and relatives in the area (37%), sightseeing (22%) and shopping for pleasure (12%). The most popular activities for day trippers which can be considered particular to this destination, are visiting wineries (15%) and going bushwalking (12%).

Table 15: Activities - Day trip visitors

Activities	Number of Visitors '000	% of Visitors
Go bushwalking/rainforest walks	13	12%
Visit national parks/state parks	8	7%
Total Outdoor/ Nature or nature based trips	**17**	**16%**
Fishing	2	2%
Exercise, gym or swimming	2	2%
Water activities / sports	4	4%
Total Active outdoor sports	**8**	**7%**
Visit museums or art galleries	2	2%
Attend festivals, fairs or cultural events	3	3%
Total Arts/ heritage	**5**	**5%**
Visit wineries (Agri-tourism)	16	15%
Visit farm gates	3	3%
Go on guided tours or excursions	2	2%
Go to markets	2	2%
Total local attractions/ tourist activities	**23**	**21%**
Eat out at restaurant and/or cafe	53	50%
Visit friends & relatives	40	37%
Sightseeing/looking around	24	22%
Go shopping for pleasure	13	12%
Picnics or BBQs	5	5%
Total Social Activities	**88**	**82%**

International Visitors

The International Visitor Survey (IVS) administered by Tourism Research Australia also has many possible visitor activities listed. In this case, Indigenous cultural activities are select out under a separate heading, giving six main types of visitor activities. Table 16 is reproduced from the IVS.

Visitor activities recorded by the IVS are not recorded for regions or destinations in Australia. The visitors are only asked if they undertook the activity while in Australia. Therefore, there is no data available on international visitor activities specific to the Granite Belt destination.

International visitors in Australia also specified social activities as their main activity, with 98% of international visitors reporting participation in one or more of the listed social activities. Outdoor /nature activities were the next most popular activities (93%) with 72% of international visitors having visited a national park while in Australia. In the tourism attractions category (88%), 31% of international visitors had visited a winery somewhere in Australia.

Table 16: International Visitor Survey visitor activities grouped –International Visitors

Outdoor / nature activities	Active outdoors / sports activities	Arts / heritage activities	Indigenous culture activities	Local attractions/ tourist activities	Social / other activities
1. Go to the beach (incl. swimming, taking a picnic etc) 2. Visit national parks and/or state parks 41. Go bushwalking and/or rainforest walks 3. Visit botanic gardens or other public gardens 4. Go whale / dolphin watching (in the ocean) 6. Visit farms 52 Visit a reef	7. Go fishing 8. Play golf 31. Scuba diving 32. Snorkelling 38. Surfing 36. Water sports (e.g. sailing, windsurfing, kayaking, etc) 44. Snow sports 45. Other outdoor activities (e.g. horse riding, rock climbing, bungee jumping, four-wheel driving, reef walking etc) 49. Go cycling 48. Other sports	11. Attend theatre, concerts or other performing arts 12. Visit museums or art galleries 13. Visit art / craft workshops / studios 14. Attend festivals / fairs or cultural events 17. Visit historical / heritage buildings, sites or monuments	15. Experience Aboriginal art/craft and cultural displays 16. Visit an Aboriginal site/community 37. Attend an Aboriginal performance (e.g., dance, theatre)	18. Visit amusement / theme parks 19. Visit wildlife parks / zoos / aquariums 20. Go on guided tours or excursions 21. Go to markets (e.g., street, arts & crafts) 55. Visit farm gates (e.g., buy fresh fruit, fresh eggs, strawberry/cherry picking etc.) 22. Tourist trains 33. Go on a charter boat/cruise/ferry ride 34. Visit a health spa / sanctuary / well-being centre 24. Visit wineries 56 Visit breweries 57 Visit distilleries 54 Visit or stay on an island	26. Visit pubs, clubs and nightclubs 27. Visit casinos 47. Eat out/dine at a restaurant and/or café 28. Attend an organised sporting event 29. Go shopping (for pleasure) 35. Undertake a short educational course (eg. intensive English course) 50. Sightseeing/looking around 51. Attend Movies/Cinema 97. None of these 98. Other (**SPECIFY**)

Source: Tourism Research Australia.

Table 17: Activities - International Visitors

Activities	% International Visitors participating whilst in Australia
Visit national parks/state parks	72%
Go bushwalking/rainforest walks	48%
Visit botanical or other public gardens	57%
Visit farms	45%
Total Outdoor/ Nature or nature based trips	**93%**
Fishing	15%
Exercise, gym, or swimming	14%
Total Active outdoor sports	**54%**
Visit museums or art galleries	46%
Visit history/heritage buildings, sites, or monuments	41%
Attend festivals, fairs, or cultural events	32%
Attend theatre, concert, or other performing arts	15%
Total Arts/ heritage	**67%**
Visit wineries (Agri-tourism)	31%
Go to markets	64%
Go on guided tours or excursions	22%
Visit farm gates	25%
Total local attractions/ tourist activities	**88%**
Eat out at restaurant and/or cafe	96%
Sightseeing/looking around	90%
Go shopping for pleasure	87%
Pubs, clubs, discos etc.	62%
Attend Movies/ Cinema	39%
Visit Casino	27%
Total Social Activities	**98%**

Appendix 7: Activities by Seasonality

Analysis of the seasonal distribution of activities was undertaken because this could shed light on opportunities to boost tourism in low seasons where there is capacity to host extra visitors with existing infrastructure.

Domestic overnight visitors

Overall, most domestic overnight visitors stayed in the Stanthorpe (84%) as compared to the Stanthorpe region (16%). The June and September quarters are the busiest periods for both Stanthorpe and Stanthorpe region.

Based on the four-year average (2016-2019), June (Stanthorpe region) and September (Stanthorpe) quarters are the peak seasons of the year for domestic overnight visitors. Social (75%), tourists/local (36%) and nature-outdoor (33%) activities are the top three main activities of domestic overnight visitors in Stanthorpe. Domestic overnight visitors were involved mainly in social (14%) and outdoor nature (11%) and sports/active nature (7%) activities when they were in the Stanthorpe region.

Table 18: Domestic overnight visitors, activities by quarter

Activities	Destination SA2	Visitors '000 in quarter of the year - Four year moving average (2016 -2019)					% of total visitors
		March	June	September	December	Total	
Outdoor/nature	Stanthorpe	12	17	14	13	55	33%
	Stanthorpe Region	2	8	6	3	19	11%
Active outdoor/sports	Stanthorpe	9	9	5	3	26	16%
	Stanthorpe Region	1	5	4	2	12	7%
Arts/heritage	Stanthorpe	11	6	9	6	32	20%
	Stanthorpe Region	1	1	1	1	4	3%
Local attractions / tourist activities	Stanthorpe	15	14	21	9	59	36%
	Stanthorpe Region	1	3	4	1	9	5%
Social activities	Stanthorpe	27	27	36	33	124	75%
	Stanthorpe Region	2	10	7	5	23	14%
Other activities	Stanthorpe	1	1	1	1	4	2%
	Stanthorpe Region	0	0	0	0	1	0%
None of these	Stanthorpe	6	12	7	7	32	19%
	Stanthorpe Region	1	2	1	2	6	3%
Not asked	Stanthorpe	0	0	0	1	1	1%
	Stanthorpe Region	0	0	0	0	0	0%
Total	Stanthorpe	28	36	37	37	138	84%
	Stanthorpe Region	2	11	8	5	26	16%
Total		30	47	45	42	164	100%

Domestic Day Trips

Based on the latest four-year average (2016 to 2019), social (79%), tourists/local (21%) and nature-outdoor (12%) activities are the top three main activities of day visitors in Stanthorpe. Conversely, day visitors participate mainly in social and sports/active nature (6%) and outdoor nature (3%) activities when they are in the Stanthorpe region. Opportunities for the destination in appealing to more day trippers include boosting visitor numbers in March and December.

Table 19: Domestic day trip visitors, activities by quarter

Activities	Destination SA2	Domestic day visitors '000					% of total visitors
		March	June	September	December	Total	
Outdoor/nature	Stanthorpe	2	5	6	0	13	12%
	Stanthorpe Region	2	2	0	0	4	3%
Active outdoor/sports	Stanthorpe	0	2	0	0	2	2%
	Stanthorpe Region	2	4	0	0	6	6%
Arts/heritage	Stanthorpe	0	0	4	1	5	4%
	Stanthorpe Region	0	0	0	0	0	0%
Local attractions/ tourist activities	Stanthorpe	2	7	13	0	23	21%
	Stanthorpe Region	0	0	0	0	0	0%
Social activities	Stanthorpe	15	16	25	28	84	79%
	Stanthorpe Region	2	4	0	0	6	6%
Other activities	Stanthorpe	0	0	0	1	1	1%
	Stanthorpe Region	0	0	0	0	0	0%
None of these	Stanthorpe	0	4	2	4	10	10%
	Stanthorpe Region	2	0	0	2	3	3%
Not asked	Stanthorpe	0	4	0	0	4	4%
	Stanthorpe Region	0	0	0	0	0	0%
Total	Stanthorpe	15	24	29	33	99	93%
	Stanthorpe Region	4	4	0	2	8	7%
Total		19	27	29	35	107	100%

Appendix 8: Visitor expenditure

Expenditure by all visitors

The analysis reveals that tourists spent $79 million in the Granite Belt Destination (average 2015 to 2018). This was made up of $53 million from domestic overnight visitors, $13 million from domestic day trip visitors and $13 million from international visitors.

The average spends per trip for the largest contributors, domestic overnight visitors, was $317 based on an average per person per night spend of $113. Domestic day trip visitors spent on average $120 when visiting for a day. While the number of international visitors was low, and their spend per night was low at $32, the long average stay of these visitors means they spent on average $1,865 per trip.

For context, the visitors' expenditure in the Granite Belt Destination was compared with some local areas, the Southern Queensland Country Tourism Region and Queensland as a whole (Table 19). The Granite Belt Destination hosts 5% of the visitors and 13% of the visitor nights in the SQC Tourism Region. The total expenditure of $79 million for the Granite Belt Destination made up 6% of visitor expenditure in SQC and less than 1% for Queensland.

The average spending for domestic overnight trips and visitor nights for the Granite Belt Destination was slightly lower than for SQC, based on the same average of 3 visitor nights per trip. In fact, the Granite Belt Destination had the lowest spending per visitor night for domestic and international overnight visitors across the destinations compared in Table 20, but a higher day trip expenditure than most.

An estimate of jobs supported by tourism expenditure in the Granite Belt Destination was made by the authors of this report using the Southern Queensland Country Regional Tourism Satellite Accounts data. This must be considered a ball-park estimate only. The TSA indicates there are 7 full time equivalent total jobs supported for revery $1 million tourism consumption expenditure. Thus, $79 million expenditure supports approximately 553 jobs.

The group of domestic overnight visitors who visited wineries spent $19 million in the Granite Belt destination (Table 21). Due to small sample sizes, it is not possible to estimate the spending by day trip and international visitors who visited wineries. Therefore, the estimate of $19 million contribution to the region by winery visitors is conservative. Using the same approach to employment estimates based on TSA relationships, approximately 133 jobs are supported by this expenditure.

Similarly, visitors who visited national parks spent $14 million in the Granite Belt destination (Table 21), and this is estimated at supporting approximately 98 jobs. These are not mutually exclusive groups because many visitors visited both wineries and national parks.

Table 20: Visitor numbers, nights, average stay, expenditure ($M), average spending per trip ($) and per night ($) - Stanthorpe-Stanthorpe region, Warwick, Southern Downs, Southern Queensland Country, Brisbane, and Queensland

4 years average (Year ending December 2015 - Year ending December 2018)				
Visitors (000)	**International**	**Domestic overnight**	**Domestic day**	**Total**
Stanthorpe - Stanthorpe Region	7	167	113	287
Warwick	2	136	309	446
Southern Downs (R) - QLD	10	360	547	917
Tenterfield (A) - NSW	3	114	np	194
Southern Queensland Country - TR	48	1,964	3,652	5,664
Brisbane - TR	1,277	6,722	15,477	23,476
Queensland	2,591	21,669	41,233	65,494
Nights (000)	**International**	**Domestic overnight**	**Domestic day**	**Total**
Stanthorpe - Stanthorpe Region	397	468	-	866
Warwick	27	281	-	309
Southern Downs (R) - QLD	433	891	-	1,324
Tenterfield (A) - NSW	29	267	-	296
Southern Queensland Country - TR	1,418	5,505	-	6,923
Brisbane - TR	26,462	20,008	-	46,469
Queensland	53,180	85,240	-	138,419
Av Stay (nights)	**International**	**Domestic overnight**	**Domestic day**	**Total**
Stanthorpe - Stanthorpe Region	58	3	-	-
Warwick	13	2	-	-
Southern Downs (R) - QLD	44	2	-	-
Tenterfield (A) - NSW	10	2	-	-
Southern Queensland Country - TR	30	3	-	-
Brisbane - TR	21	3	-	-
Queensland	21	4	-	-
Expenditure ($M)	**International**	**Domestic overnight**	**Domestic day**	**Total**
Stanthorpe - Stanthorpe Region	$ 13	$ 53	$ 13	$ 79
Warwick	$ 1	$ 37	$ 32	$ 70
Southern Downs (R) - QLD	$ 14	$ 104	$ 52	$ 170
Tenterfield (A) - NSW	$ 1	$ 31	np	$ 42
Southern Queensland Country - TR	$ 60	$ 681	$ 486	$ 1,227
Brisbane - TR	$ 2,251	$ 4,034	$ 1,557	$ 7,842
Queensland	$ 5,295	$ 15,797	$ 4,515	$ 25,607
Av Spend per trip ($)	**International**	**Domestic overnight**	**Domestic day**	**Total**
Stanthorpe - Stanthorpe Region	$ 1,865	$ 317	$ 120	$ 277
Warwick	$ 510	$ 271	$ 103	$ 156
Southern Downs (R) - QLD	$ 1,456	$ 289	$ 95	$ 186
Tenterfield (A) - NSW	$ 369	$ 275	np	$ 215
Southern Queensland Country - TR	$ 1,268	$ 347	$ 133	$ 217
Brisbane - TR	$ 1,764	$ 600	$ 101	$ 334
Queensland	$ 2,043	$ 729	$ 110	$ 391
Av Spend per night ($)	**International**	**Domestic overnight**	**Domestic day**	**Total**
Stanthorpe - Stanthorpe Region	$ 32	$ 113	$ -	$ 76

Warwick	$	40	$	130	$	-	$	123
Southern Downs (R) - QLD	$	33	$	117	$	-	$	89
Tenterfield (A) - NSW	$	37	$	117	$	-	$	110
Southern Queensland Country - TR	$	43	$	124	$	-	$	107
Brisbane - TR	$	85	$	202	$	-	$	135
Queensland	$	100	$	185	$	-	$	152

Source: Tourism Research Australia, Regional Profiles 2008 -2018, Stanthorpe

Visitor expenditure by main activities (Domestic visitors)

An analysis was made of the expenditure associated with different visitor activities in the Granite Belt Destination. There are limitations to this analysis due to sample sizes being too small for the Stanthorpe region, international and day trip visitors when the data are broken down to activity level. Therefore, the results in Table 21 reflect only the largest group of visitors, domestic overnight visitors to Stanthorpe.

Because each visitor can participate in multiple activities, the numbers in this table cannot be added across the activity types. The analysis shows that, for example, domestic overnight visitors who visited a winery, spent $19 million in Stanthorpe. That includes not only what they spent at wineries but includes their spending on all other activities in which they participated and accommodation that is, their entire spending per visitor night in the destination. This group of visitors had a higher than average spend per visitor night ($179) and third highest spend per trip ($445) compared with other visitors.

A similar interpretation can be made for visitors who participate in other activities, for example Outdoor/Nature activities, or Arts/Heritage, remembering that the results in the table are not mutually exclusive.

Table 21: Domestic overnight visitors – breakdown of main activities, expenditure, average spending per trip ($) and average spending per night ($)

Main activities (A-four year rolling averages, year ending December)		Domestic overnight										
		2006 - 2009	2007 - 2010	2008 - 2011	2009 - 2012	2010 - 2013	2011 - 2014	2012 - 2015	2013 - 2016	2014 - 2017	2015 - 2018	2015 - 2018 (%of total trip activities)
Expenditure ($M)	Visit national parks / state parks	np	np	np	np	np	np	18	15	16	14	27%
	Bushwalking / rainforest walks	np	np	np	np	13	19	22	19	18	11	22%
	Total Outdoor / Nature	**15**	**16**	**14**	**18**	**17**	**22**	**29**	**29**	**28**	**24**	47%
	Total Active outdoor / sports	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**13**	25%
	Total Arts / Heritage	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**12**	24%
	Visit wineries (agri-tourism)	15	17	21	21	25	27	25	24	25	19	38%
	Total Local attractions / Tourist activities	**18**	**20**	**24**	**25**	**29**	**31**	**28**	**27**	**27**	**22**	43%
	Visit friends & relatives	10	11	12	11	10	10	9	9	10	11	22%
	Go shopping for pleasure	np	np	np	np	np	np	15	16	15	15	30%
	Eat out / dine at a restaurant and/or cafe	22	23	27	28	31	33	33	34	37	39	77%
	Sightseeing/looking around	np	15	19	21	21	19	15	13	15	16	31%
Expenditure	**Total Social activities**	**28**	**30**	**37**	**38**	**39**	**41**	**40**	**40**	**45**	**46**	90%
Expenditure ($M)	**Total Trip Activities**	**34**	**35**	**44**	**46**	**47**	**49**	**47**	**47**	**50**	**51**	
Av Spend per trip ($)	Visit national parks / state parks	np	np	np	np	np	np	569	476	427	360	118%
	Bushwalking / rainforest walks	np	np	np	np	435	561	526	477	404	295	97%
	Total Outdoor / Nature	**388**	**359**	**337**	**410**	**400**	**489**	**505**	**452**	**429**	**373**	122%
	Total Active outdoor / sports	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**389**	127%
	Total Arts / Heritage	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**446**	146%
	Visit wineries (agri tourism)	446	463	574	545	607	703	571	554	527	445	146%
	Total Local attractions / Tourist activities	**415**	**448**	**542**	**544**	**627**	**718**	**589**	**534**	**479**	**412**	135%
	Visit friends & relatives	261	245	258	246	208	226	181	175	187	184	60%
	Go shopping for pleasure	np	np	np	np	np	np	487	526	492	522	171%
	Eat out / dine at a restaurant and/or cafe	397	403	513	541	574	640	493	424	429	384	126%
	Sightseeing/looking around	np	440	514	474	450	463	386	373	397	378	124%
	Total Social activities	**338**	**325**	**385**	**386**	**394**	**443**	**377**	**340**	**347**	**321**	105%
Av Spend per trip ($)	**Total Trip Activities**	**327**	**303**	**355**	**362**	**370**	**424**	**375**	**346**	**335**	**306**	
Av Spend per night ($)	Visit national parks / state parks	np	np	np	np	np	np	188	166	162	128	117%
	Bushwalking / rainforest walks	np	np	np	np	123	171	158	149	152	107	98%
	Total Outdoor / Nature	**138**	**112**	**103**	**143**	**126**	**167**	**171**	**160**	**166**	**128**	118%
	Total Active outdoor / sports	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**95**	87%
	Total Arts / Heritage	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**np**	**95**	87%
	Visit wineries (Agri-tourism)	184	174	228	252	223	272	194	185	213	179	164%
	Total Local attractions / Tourist activities	**153**	**149**	**187**	**241**	**226**	**273**	**198**	**181**	**194**	**167**	153%
	Visit friends & relatives	88	79	80	78	66	67	52	61	67	73	66%
	Go shopping for pleasure	np	np	np	np	np	np	110	144	148	148	136%
	Eat out / dine at a restaurant and/or cafe	141	136	165	184	184	198	166	163	142	131	120%
	Sightseeing/looking around	np	149	183	202	183	192	142	143	165	151	139%
	Total Social activities	**131**	**121**	**139**	**141**	**138**	**151**	**127**	**131**	**122**	**110**	101%
Av Spend per night ($)	**Total Trip Activities**	**112**	**116**	**133**	**137**	**133**	**148**	**127**	**132**	**120**	**109**	

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