

Year ending September 2016

International Visitors to Australia

	Visitors	Annual change ¹	Avg Stay ²	Annual change
Holiday	4,142,000	18.1% ▲	19.4	(-8.5%) ▼
NZ	489,000	6.3%	9.2	3.4%
Asia ³	2,064,000	25.8%	16.5	(-6.8%)
North America ⁴	453,000	24.8%	17.2	(-5.0%)
Continental Europe ⁵	544,000	7.3%	36.1	(-7.2%)
UK	385,000	9.3%	27.2	(-15.5%)
VFR⁶	2,748,000	7.0% ▲	23.9	(-2.0%) ▼
NZ	535,000	0.0%	10.5	1.0%
Asia	1,097,000	13.5%	33.0	(-4.6%)
North America	270,000	13.5%	17.7	(-2.2%)
Continental Europe	268,000	(-1.7%)	20.8	1.0%
UK	386,000	4.0%	19.9	(-8.7%)
Business	855,000	1.1% ▲	11.2	(-7.4%) ▼
NZ	211,000	3.3%	6.1	8.9%
Asia	334,000	7.7%	13	(-9.7%)
North America	124,000	(-6.9%)	12.5	2.5%
Continental Europe	80,000	(-7.8%)	13.5	(-14.6%)
UK	57,000	(-1.3%)	14.9	(-19.0%)
TOTAL⁷	7,348,000	11.7% ▲	34.1	(-7.1%) ▼
NZ	1,188,000	3.3%	12.8	(-7.9%)
Asia	3,503,000	18.5%	38.6	(-7.9%)
North America	767,000	15.4%	25.3	(-5.9%)
Continental Europe	779,000	3.6%	47.8	(-7.9%)
UK	660,000	5.1%	36.3	(-12.1%)

International Expenditure in Australia

EXPENDITURE ⁸	\$ million	Annual change
Australia	\$25,814.6m	11.5%

Record Visitors to Australia

The recent increases in international visitors to Australia continued for the year ending September 2016. With 767,000 additional international visitors to Australia over the year, visitor growth reached 11.7% on the same period last year or a record 7.35 million international visitors. Underscoring this record performance was a perfect score of results with increases across every international source market.

The growth in visitors from Asian source markets continued with 18.5% growth in visitors from across Asia, including China, which helped drive the Asian share of all international visitors up 2.8% for the year ending September 2016. North America also continued to perform well with an increase of 15.4% that lifted its share of international visitors slightly to 10.4%. UK visitors grew by 5.1% while Continental Europe was up 3.6%.

China Over the Million

The impressive growth in international visitors from China to Australia continued with more than one million Chinese visitors during the year and growth of 22.3% over the year prior. The broad impact of this growth in total visitor numbers can be seen in the growth of the component parts. Whilst those visiting for holidays increased 28.4%, there was also strong growth in those visiting for education purposes which increased 24.2%. Holiday visitors contributed 65.7% of all Chinese visitors and those visiting friends and relatives had a 24.4% share of the total.

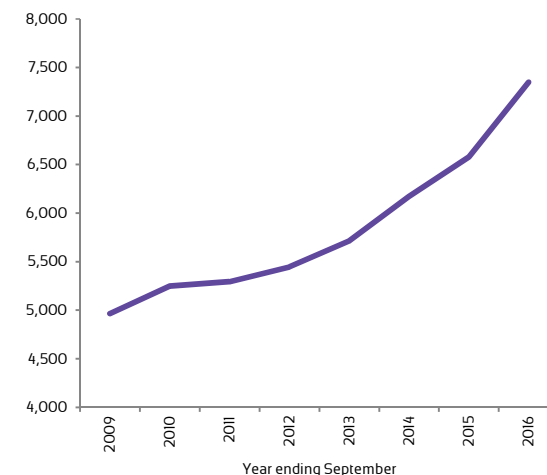
Purpose of Travel

International visitor growth occurred across most 'purpose of travel' categories. Holiday visitors increased 18.1% and contributed 56.4% of all international visitors to Australia and those who came to visit friends and relatives increased 7.0% and contributed 37.4% of all international visitors. International education visitors increased 11.6% and contributed 7.3% of visitors, who increased their nights by 8.1% and contributed 25.5% of all international visitor nights in Australia.

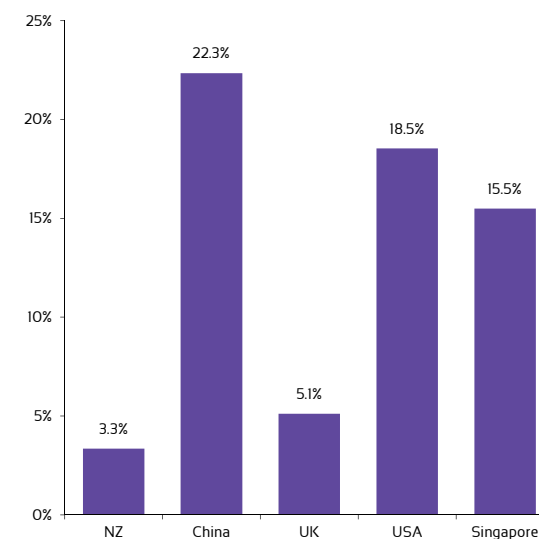
Expenditure Records

Records for expenditure increased in the year ending September 2016. Total international visitor expenditure for Australia reached a record \$25.8 billion. This included record expenditure for several source markets including China (\$6.75 billion), United States (\$1.9 billion), Korea (\$1.1 billion), India (\$793.5 million) and Germany (\$725.8 million). There was also record levels of expenditure for Queensland, New South Wales, Victoria, South Australia, Western Australia and ACT.

International Visitors ('000) to Australia



Annual change in visitors to Australia, Top 5



Year ending September 2016

State Comparison

	Visitors	Annual change	Avg Stay	Annual change
Holiday				
Qld	1,779,000	17.0%	12.8	(-5.9%)
NSW	2,220,000	17.6%	12.0	(-7.0%)
Vic	1,458,000	20.7%	10.2	(-8.9%)
Other States	1,007,000	15.0%	16.1	(-11.0%)
Australia	4,142,000	18.1%	19.4	(-8.5%)

VFR				
Qld	585,000	4.8%	21.2	2.9%
NSW	981,000	4.9%	21.4	(-4.9%)
Vic	853,000	9.3%	21.5	(-4.0%)
Other States	630,000	11.0%	22.1	(-1.3%)
Australia	2,748,000	7.0%	23.9	(-2.0%)

Business				
Qld	165,000	(-0.1%)	8.8	22.2%
NSW	385,000	(-0.5%)	8.7	(-7.4%)
Vic	280,000	5.7%	8.0	(-17.5%)
Other States	184,000	1.2%	14.1	(-9.6%)
Australia	855,000	1.1%	11.2	(-7.4%)

TOTAL				
Qld	2,551,000	13.1%	20.8	(-7.1%)
NSW	3,760,000	12.6%	23.2	(-6.1%)
Vic	2,630,000	13.3%	22.8	(-8.4%)
Other States	1,816,000	9.3%	27.7	(-9.2%)
Australia	7,348,000	11.7%	34.1	(-7.1%)

Growth in Visitors Continues

All of Australia's core international source markets increased in visitor numbers in the year ending September 2016. Asian source markets continued their good growth with impressive double digit increases across a number of countries. Western markets solidified their modest growth with the United States continuing to see a double figure growth rate. Overall, growth in visitor numbers was seen across all states and territories.

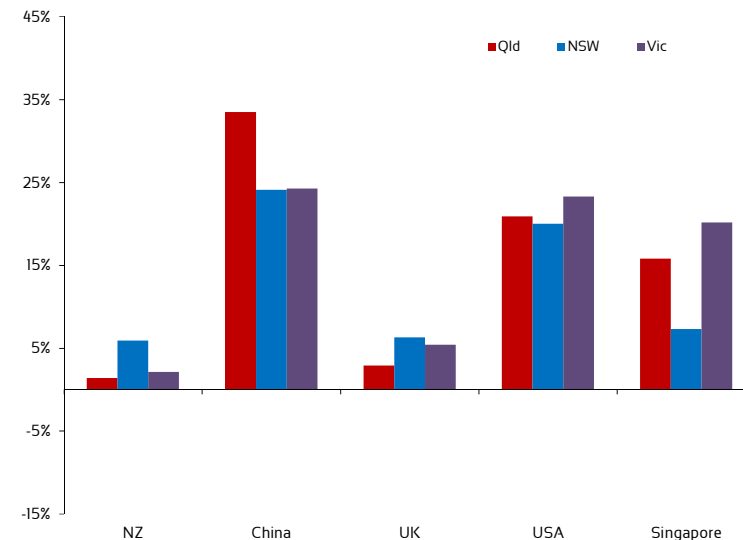
Spending is Trending

International visitor expenditure increased nationally in the year ending September 2016 with all states and territories experiencing increases. Queensland saw growth of 10.6%, which led to a record \$5.2 billion in the year ending September 2016. New South Wales recorded an increase of 16.0% in overnight visitor expenditure, while Victoria had growth of 8.5%. Holiday and Education travel drove international spending for most states, up 15.9% and 18.4% respectively; however, declines in spending by business (-6.5%) and employment (-4.5%) travellers held back further growth.

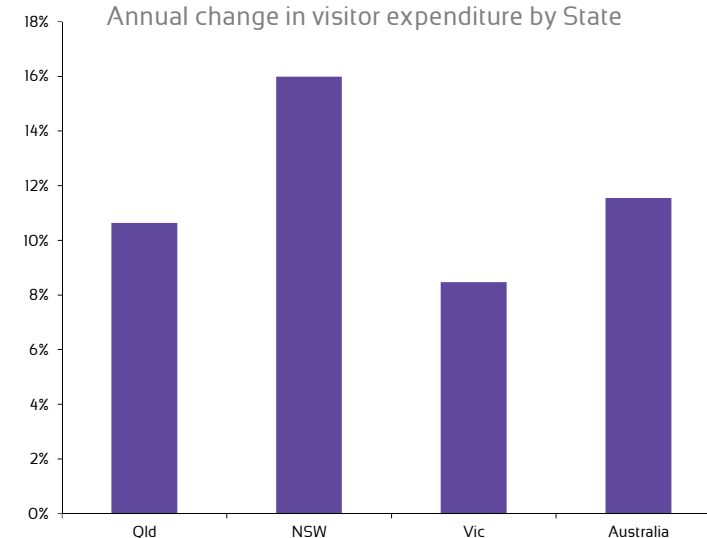
Purpose by State

Holiday travel continues to drive international visitor growth. Looking at the profile of visitors within the three larger states, Queensland had the strongest share of holiday visitors as a proportion of all international visitors at 69.7%. New South Wales was next with 59.0% followed by Victoria with 55.4%. The proportion of VFR visitors to Queensland was 22.9% of all international visitors, with New South Wales on 26.1% and Victoria at 32.4%. From a business perspective, Queensland's proportion of total visitors to the State was 6.5%, compared to 10.2% for New South Wales and 10.6% for Victoria.

Annual change by state in key markets



Annual change in visitor expenditure by State



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Year ending September 2016

International Visitors to Queensland

	Visitors	Annual change	Avg Stay	Annual change
Holiday	1,779,000	17.0% ▲	12.8	(-5.9%) ▼
NZ	220,000	6.2%	11	22.2%
Asia	877,000	30.4%	11.1	(-5.9%)
North America	199,000	19.1%	10.4	5.1%
Continental Europe	241,000	(-1.4%)	19.6	(-7.5%)
UK	159,000	5.2%	16.2	(-21.4%)

VFR	585,000	4.8% ▲	21.2	2.9% ▲
NZ	188,000	(-2.7%)	10.2	4.1%
Asia	153,000	10.7%	37.9	6.8%
North America	55,000	17.2%	17	(-5.6%)
Continental Europe	54,000	6.4%	18.4	(-6.6%)
UK	82,000	1.2%	17.7	(-11.5%)

Business	165,000	(-0.1%) ●	8.8	22.2% ▲
NZ	39,000	(-10.2%)	6.1	32.6%
Asia	63,000	16.9%	10.9	28.2%
North America	24,000	(-1.6%)	7.8	(-12.4%)
Continental Europe	15,000	1.6%	7.2	(-19.1%)
UK	9,000	(-18.2%)	14.6	117.9%

TOTAL	2,551,000	13.1% ▲	20.8	(-7.1%) ▼
NZ	435,000	1.4%	12.9	9.3%
Asia	1,143,000	25.6%	22.2	(-8.3%)
North America	280,000	18.6%	16.3	(-7.4%)
Continental Europe	300,000	0.6%	26.7	(-9.5%)
UK	227,000	2.9%	21.8	(-22.1%)

International Expenditure in Queensland

EXPENDITURE	\$ million	Annual change
Queensland	\$5,152.1m	10.6%

Happy Holidaying

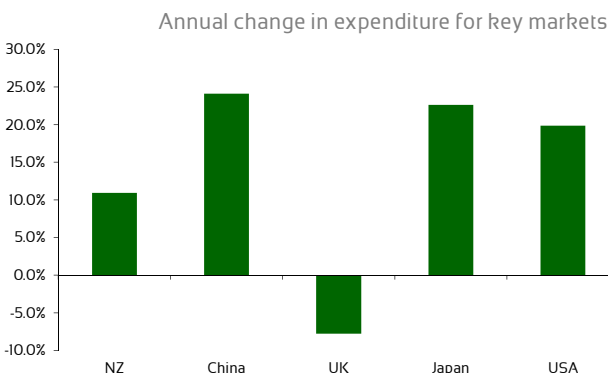
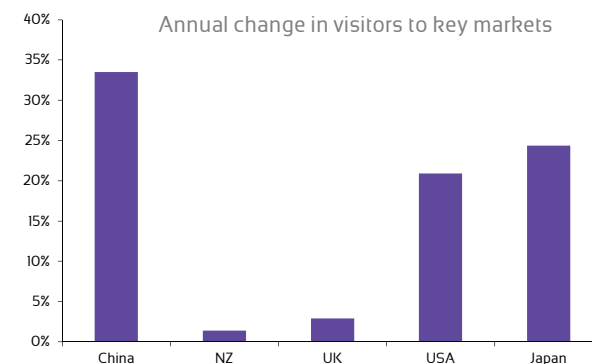
International overnight visitor expenditure for Queensland continued recent solid growth with an increase of 10.6% to a record \$5.2 billion, for the year ending September 2016. The number of international visitors to Queensland also reached record highs with 13.1% growth to 2.55 million visitors. Many of the State's key source markets achieved double digit growth. Holiday travel was the key contributor to this result, with the State welcoming 1.8 million international holidaymakers over the same period. Holiday travel represents 69.7% of total international visitation to the State. This growth in holiday travel was supported by 4.8% growth in VFR travel, while business travel was stable (-0.1%).

Market Mix

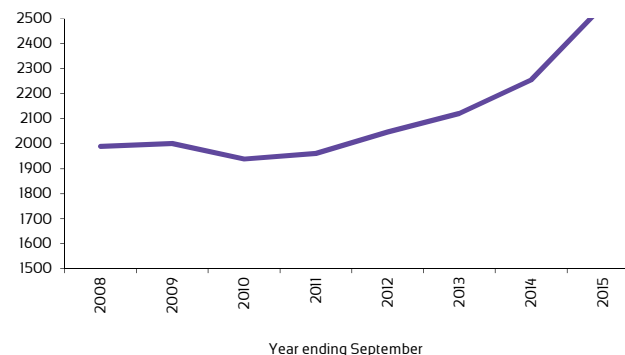
14 of Queensland's top 20 international markets recorded increases in overnight visitor expenditure, with strong growth from key source markets including China (up 24%), New Zealand (up 11%), the USA (up 20%), Germany (up 7%) and Japan (up 23%).

Capitalise on China

China remained Queensland's largest source market in terms of visitor expenditure and visitor numbers. Visitation from China to Queensland increased 33.5% to 485,000. Expenditure by Chinese visitors to Queensland also grew 24.1% to \$1.1 billion.



International Visitors ('000) to Queensland



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Year ending September 2016

International Visitors by region

	Visitors	Annual change	Avg Stay	Holiday Visitors	Annual change
Brisbane	1,183,000	9.6%	20.9	632,000	14.8%
Gold Coast	1,014,000	16.2%	10.6	807,000	17.5%
Sunshine Coast	272,000	6.4%	11.0	215,000	9.0%
Fraser Coast	136,000	3.8%	4.8	127,000	2.3%
SQC ⁹	44,000	(-13.0%)	30.6	19,000	7.4%
SGBR ¹⁰	133,000	(-6.3%)	16.7	103,000	(-3.9%)
Mackay	43,000	2.7%	10.7	31,000	9.3%
Whitsundays	229,000	9.6%	6.6	221,000	10.3%
Townsville	125,000	2.1%	13.0	96,000	2.3%
TNQ	877,000	16.0%	7.5	815,000	16.9%

	Visitors	Trend change ¹²	Avg Stay	Holiday Visitors	Trend change
Outback ¹¹	20,000	5.2%	10.6	16,000	10.4%

Expenditure in Queensland regions

	\$ million	Annual change	Spend per visitor	Spend per night
Brisbane	\$1,978.3m	6.9%	\$1,664.77	\$79.98
Gold Coast	\$1,276.2m	15.0%	\$1,257.59	\$119.02
Sunshine Coast	\$266.5m	45.1%	\$979.59	\$89.34
Fraser Coast	\$39.8m	(-6.4%)	\$292.37	\$60.53
SQC ⁹	\$57.8m	(-18.7%)	\$1,310.73	\$42.80
SGBR ¹⁰	np	np	np	np
Mackay	np	np	np	np
Whitsundays ¹²	\$209.2m	21.7%	\$914.78	\$138.30
Townsville	\$90.6m	4.1%	\$727.25	\$55.82
TNQ	\$1,100.6m	11.6%	\$1,255.63	\$166.44

Brisbane

Brisbane saw record high international visitor numbers in the year ending September 2016, with an increase of 9.6%. This was driven by growth in Holiday and VFR travel. Brisbane saw strong growth from Asian markets, particularly China, Japan, Korea and Hong Kong. Growth from North America was also strong (up 20.1%). International visitor expenditure reached a record high of \$2.0 billion and visitors also stayed longer with nights up 4%.

Gold Coast

The Gold Coast recorded a 16.2% increase in international visitors in the year ending September 2016, a record high. Double digit growth was seen in all travel purposes except VFR, which was up 3.7%. This was driven by double digit growth in a number of Asian markets including China, Hong Kong, Taiwan and Korea. The US also saw double digit growth, while NZ and the UK increased moderately. Visitor expenditure on the Gold Coast increased 15.0% to a record \$1.3 billion.

Tropical North Queensland

International travel to Tropical North Queensland increased 16.0% to a record high 877,000 in the year ending September 2016. TNQ is the most popular holiday destination in the state. Top three source markets, i.e. China, US and Japan, all saw strong growth, while New Zealand visitation also increased by double digits. Overnight visitor expenditure grew 11.6% to \$1.1 billion.

Sunshine Coast

International visitation to the Sunshine Coast grew by 6.4% to 272,000 in the year ending September 2016, with an increase in holiday travel of 9.0%. There was good growth from NZ and the US, which was offset by a decline in visitors from the UK. Despite moderate visitor growth, nights in the region were up 21% to 3.0 million, driving expenditure to increase to \$266.5 million, a record high.

Whitsundays

The Whitsundays recorded growth of 9.6% in international visitation in the year ending September 2016. Growth from North America and China contributed to this result. Germany, Japan and New Zealand saw modest growth. Increased visitors and nights (up 3%) drove increased visitor expenditure to the region.

Fraser Coast

International travel to the Fraser Coast increased 3.8% to 136,000 visitors in the year ending September 2016. This was driven by growth from the UK and Germany. Visitor expenditure on the Fraser Coast declined over the year, while visitor nights increased.

Townsville

Townsville saw an increase of 2.1% in international visitors in the year ending September 2016. Good growth was seen in visitors from North America, UK and Germany. Growth in visitor nights spent in the region contributed to a 4% increase in international overnight visitor expenditure.

Southern Great Barrier Reef

International travel to the SGBR declined by 6.3% to 133,000 in the year ending September 2016, driven by a significant decline in employment visitors in line with the slowing of CSG investment.

Southern Queensland Country

International visitation to SQC declined 13.0% due to significant falls in employment visitors. VFR also decreased, while holiday visitors increased by 7.4% over the year.

Mackay

The number of international visitors to Mackay increased by 2.7% in the year ending September 2016. This was driven by 9.3% growth in Holiday visitation, and growth from Germany.

Outback

International visitation to the Outback increased 5.2% in the three years to September 2016.

Year ending September 2016

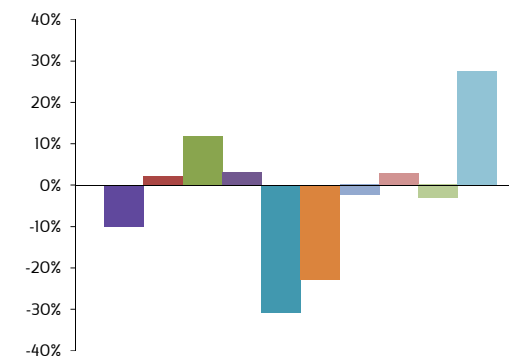
Region comparison by source market

NZ	Visitors	% Chg
Brisbane	169,000	(-10.1%)
Gold Coast	195,000	2.1%
Sunshine Coast	66,000	11.6%
Fraser Coast	8,000	3.1%
SQC	7,000	(-30.8%)
SGBR	16,000	(-22.8%)
Mackay	7,000	(-2.4%)
Whitsundays	12,000	2.9%
Townsville	10,000	(-3.2%)
Outback ¹¹	n/p	n/p
TNQ	47,000	27.6%
Queensland	435,000	1.4%

China	Visitors	% Chg
Brisbane	221,000	29.9%
Gold Coast	295,000	38.4%
Sunshine Coast	7,000	70.2%
Fraser Coast	n/p	n/p
SQC	n/p	n/p
SGBR	n/p	n/p
Mackay	n/p	n/p
Whitsundays	20,000	40.1%
Townsville	n/p	n/p
Outback ¹¹	n/p	n/p
TNQ	219,000	32.2%
Queensland	485,000	33.5%

UK	Visitors	% Chg
Brisbane	125,000	4.3%
Gold Coast	70,000	5.8%
Sunshine Coast	54,000	(-9.7%)
Fraser Coast	36,000	7.8%
SQC	7,000	(-29.1%)
SGBR	22,000	(-10.0%)
Mackay	n/p	n/p
Whitsundays	49,000	0.2%
Townsville	26,000	6.2%
Outback ¹¹	n/p	n/p
TNQ	93,000	1.9%
Queensland	227,000	2.9%

Annual change in NZ visitation by region

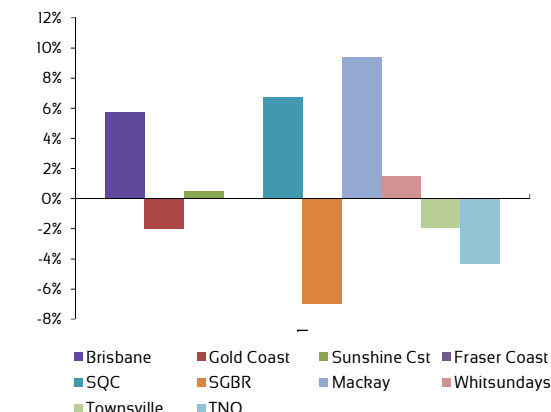


Europe ⁵	Visitors	% Chg
Brisbane	181,000	5.7%
Gold Coast	86,000	(-2.0%)
Sunshine Cst	84,000	0.5%
Fraser Coast	68,000	(-0.1%)
SQC	10,000	6.8%
SGBR	51,000	(-7.0%)
Mackay	18,000	9.4%
Whitsundays	88,000	1.5%
Townsville	55,000	(-2.0%)
Outback ¹¹	10,000	3.7%
TNQ	148,000	(-4.4%)
Queensland	300,000	0.6%




















Japan	Visitors	% Chg
Brisbane	39,000	34.4%
Gold Coast	56,000	6.2%
Sunshine Coast	n/p	n/p
Fraser Coast	n/p	n/p
SQC	n/p	n/p
SGBR	n/p	n/p
Mackay	n/p	n/p
Whitsundays	8,000	9.7%
Townsville	n/p	n/p
Outback ¹¹	n/p	n/p
TNQ	110,000	27.8%
Queensland	194,000	24.4%

Nth America	Visitors	% Chg
Brisbane	122,000	20.1%
Gold Coast	53,000	15.8%
Sunshine Coast	31,000	23.5%
Fraser Coast	12,000	(-7.2%)
SQC	5,000	(-28.0%)
SGBR	17,000	(-2.9%)
Mackay	n/p	n/p
Whitsundays	35,000	38.7%
Townsville	17,000	36.6%
Outback ¹¹	n/p	n/p
TNQ	137,000	16.0%
Queensland	280,000	18.6%

Annual change in European (excl UK)⁵ visitation by region



Year ending September 2016

	Qld		NSW		Vic		Australia	
	Visitors	Annual change	Visitors	Annual change	Visitors	Annual change	Visitors	Annual change
 New Zealand	435,000	1.4%	422,000	5.9%	327,000	2.1%	1,188,000	3.3%
Total Asia	1,143,000	25.6%	1,760,000	18.2%	1,388,000	20.2%	3,503,000	18.5%
 Japan	194,000	24.4%	150,000	12.2%	56,000	19.9%	362,000	21.1%
 Hong Kong	63,000	19.4%	112,000	9.1%	88,000	9.1%	219,000	13.2%
 Singapore	68,000	15.8%	122,000	7.3%	126,000	20.1%	383,000	15.5%
 Malaysia	48,000	4.3%	86,000	8.5%	139,000	13.9%	337,000	13.8%
 Indonesia	19,000	17.4%	60,000	0.9%	59,000	12.5%	141,000	6.4%
 Taiwan	69,000	20.1%	75,000	27.4%	57,000	33.3%	148,000	27.3%
 Thailand	15,000	21.2%	40,000	20.0%	29,000	10.3%	81,000	14.1%
 Korea	71,000	36.7%	198,000	28.1%	54,000	33.8%	255,000	29.1%
 China	485,000	33.5%	666,000	24.1%	566,000	24.3%	1,089,000	22.3%
 India	60,000	15.7%	121,000	10.1%	112,000	11.3%	231,000	10.1%
Other Asia	49,000	18.3%	129,000	22.4%	103,000	22.8%	259,000	16.8%
Nth America	280,000	18.6%	500,000	17.2%	250,000	17.9%	767,000	15.4%
 USA	224,000	20.9%	410,000	20.0%	204,000	23.3%	632,000	18.5%
 Canada	56,000	10.3%	90,000	5.8%	46,000	(-1.3%)	136,000	2.8%
Total Europe	527,000	1.6%	852,000	5.4%	544,000	5.6%	1,439,000	4.3%
 UK	227,000	2.9%	361,000	6.3%	226,000	5.4%	660,000	5.1%
 Germany	86,000	7.8%	125,000	6.7%	83,000	8.0%	186,000	4.0%
Scandinavia	40,000	(-1.8%)	65,000	10.9%	39,000	19.4%	100,000	5.9%
 France	39,000	(-8.3%)	75,000	(-0.7%)	46,000	0.8%	114,000	1.6%
 Italy	22,000	(-5.2%)	39,000	(-0.9%)	31,000	(-2.6%)	70,000	0.8%
 Netherlands	19,000	10.1%	27,000	6.7%	18,000	(-5.2%)	47,000	6.6%
 Switzerland	23,000	8.2%	33,000	(-2.0%)	22,000	6.0%	51,000	2.0%
Other Europe	70,000	(-3.6%)	125,000	6.6%	80,000	6.5%	212,000	4.2%
Other	167,000	3.2%	227,000	4.1%	121,000	2.3%	451,000	4.9%
TOTAL	2,551,000	13.1%	3,760,000	12.6%	2,630,000	13.3%	7,348,000	11.7%

State expenditure comparison

	Qld	NSW	Vic	Australia
Expenditure (\$ million)	\$5,152.1m	\$9,320.1m	\$6,742.3m	\$25,814.6m
Annual change	10.6%	16.0%	8.5%	11.5%
Share of expenditure	20.0%	36.1%	26.1%	100.0%
Spend per Visitor	\$2,014.41	\$2,426.92	\$2,560.66	\$3,467.50

Queensland Deep Dive

In addition to strong growth from China, Queensland enjoyed sustained growth from Japan and Korea. From the macro economic perspective, the AUD vs JPY fell almost 12% in YE Sept 2016 vs YE Sept 2015. The fall against the Korean Won was not as pronounced (2% over the same period) but came on the back of sustained weakening of the AUD against the KRW over recent years. The favourable exchange rates might have triggered more Japanese and Koreans travelling to Queensland.

Among all international markets, the Korea market had the highest growth rate by visitor numbers (up 36.7%) as well as by expenditure (up 73.6%). Of Korean holiday visitors in Queensland, Working Holiday Makers (WHM) made up 22.2%, up from 21.2% in September 2015. Their average length of stay (ALOS) was up 44 nights YOY to 181 nights in the year ended September 2016.

Notes:

1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. Avg stay: Average length of stay expressed in nights.
3. Asia includes Japan, China, Korea, Singapore, Malaysia, Hong Kong, India, Indonesia, Taiwan, Thailand and Other Asia.
4. North America includes United States of America and Canada.
5. Continental Europe includes Germany, France, Scandinavia, Netherlands, Italy, Switzerland and Other Europe.
6. Visiting friends or relatives (VFR).
7. Total includes those visitors classified as 'Other'. Therefore, the sum of Holiday, VFR, and Business visitors may not equal to 'Total'.
8. All expenditure figures include package expenditure (\$m).
9. SQC - Southern Qld Country region is comprised of Toowoomba, Southern and Western Downs regions.
10. SGBR - Southern Great Barrier Reef region is comprised of Capricorn, Bundaberg and Gladstone regions.
11. To stabilise some results, Trend is used to average data over three years. Trend change is the average change over three years rather than a year on year comparison.
12. A low response rate for the Whitsundays caused expenditure results to be below acceptable publishing guidelines. Expenditure estimates should be used with caution.

n/p - not published for technical reasons

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Data Source: International Visitor Survey, Tourism Research Australia. The information included in this report was extracted from the International Visitor Survey (IVS) conducted by Tourism Research Australia (TRA). IVS information is collected by personal interviews with short-term international visitors to Australia in the departure lounges at eight Australian airports prior to departure. The IVS is weighted to total figures supplied by the Australian Bureau of Statistics' Overseas Arrivals and Departures and does not include persons aged under 15 years.
For this publication data has been adjusted to conform to Tourism and Events Queensland's destinations, which may differ slightly from ABS Tourism Regions.

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