

## Year Ending September 2017



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
<b>Domestic Overnight</b>	<b>1,775,000</b>	<b>903,000</b>	<b>381,000</b>	<b>385,000</b>	<b>\$1,928.1m</b>
Annual % change <sup>1</sup>	▼ -2.8%	▼ -1.6%	▼ -4.9%	▼ -14.5%	▼ -2.0%
3yr trend % change <sup>2</sup>	▲ 0.6%	▼ -1.6%	▼ -3.2%	▲ 3.3%	▲ 1.6%
<b>International Overnight</b>	<b>890,000</b>	<b>830,000</b>	<b>37,000</b>	<b>15,000</b>	<b>\$1,085.5m</b>
Annual % change	▲ 1.5%	▲ 1.9%	▼ -1.0%	▼ -3.8%	▼ -1.3%
3yr trend % change	▲ 7.0%	▲ 7.6%	▲ 4.3%	▼ -3.7%	▲ 5.7%
<b>TOTAL</b>	<b>2,665,000</b>	<b>1,733,000</b>	<b>419,000</b>	<b>400,000</b>	<b>\$3,013.6m</b>
Annual % change	▼ -1.4%	● 0.1%	▼ -4.6%	▼ -14.1%	▼ -1.8%
3yr trend % change	▲ 2.6%	▲ 2.4%	▼ -2.5%	▲ 3.1%	▲ 3.0%



### Domestic Visitation

Domestic visitation to the Tropical North Queensland (TNQ) region declined by 2.8% to 1.8m in the year ending September 2017. Despite the decline, visitation has been stable over the last three years (+0.6% over the three-year trend).

The intrastate market accounted for two thirds (66%) of domestic overnight visitation and was up by 3.3% to 1.2m. Intrastate growth was mostly driven by overnight visitors from Brisbane and predominately by overall holiday travel, which grew by 15.3% to 518,000 visitors.

The interstate market was down by 12.5% to 612,000 visitors, primarily due to a 17.7% decline in holiday travel. While the Melbourne market grew by 20.7% to 214,000 visitors, the growth was offset by declines from the NSW market, in particular among Sydney holidaymakers.

Visitation by those visiting friends and relatives (VFR) declined by 4.9%, however, the number of VFR nights grew strongly, up by 13.1%, as these visitors spent on average 0.7 of a night longer in the region. This was most pronounced in the interstate market.

Despite the VFR nights growth, overall visitor nights declined 2.4% to 8.9m, and expenditure declined 2.0% to \$1.9bn.

The domestic market accounted for almost two thirds (64%) of total overnight expenditure in TNQ, the lowest share out of all of Queensland's regions, indicating a more diversified spread across the international and domestic markets.

### International Visitation

TNQ welcomed 890,000 international visitors in the year ending September 2017, a 1.5% increase on the previous year.

This growth was reflected in Cairns Airport's traffic numbers, with international passenger movements up 3.7% for the year ending September 2017 (Source: BITRE\*).

Holiday visitors dominate international visitation to the region, accounting for 93% of all international visitors to TNQ. Holiday visitation grew by 1.9%, bringing 830,000 international visitors to the region.

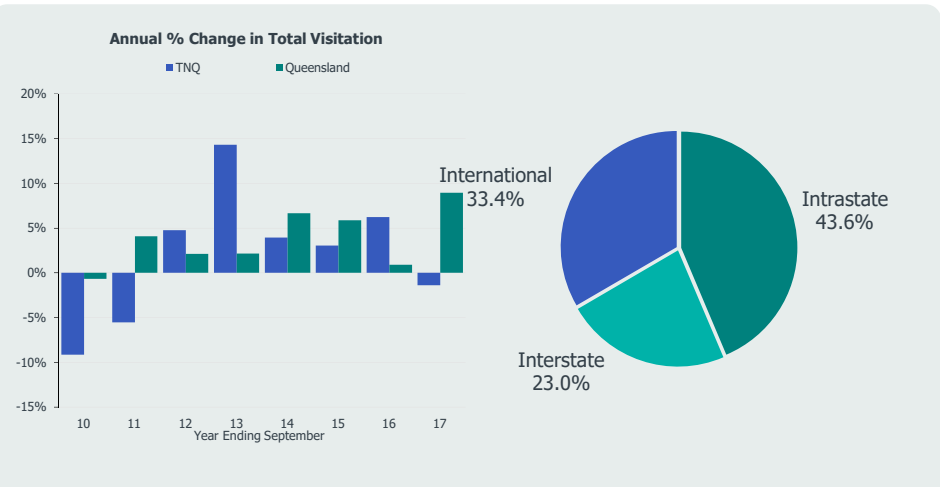
China remained the largest source market, with visitor numbers stable at 218,000 visitors (-0.5% year on year).

The region's other top 5 source markets also remained unchanged compared to the same period a year ago, these were Japan, USA, UK, and Germany. Among these, visitation grew from the UK (96,000 visitors, up by 3.5%) and Germany (up by 15.9% to 58,000), while Japan declined (109,000 visitors, down by 1.1%) as did the USA (109,000 visitors, down by 4.8%).

Visitor nights declined by 2.7% to 6.4m primarily due to a shorter average length of stay (ALoS), with international visitors staying 7.2 nights, down by 0.3 nights year on year.

This decline in visitor nights contributed to a slightly lower visitor expenditure than the previous year, down by 1.3% to \$1.1bn.

\* Bureau of Infrastructure, Transport and Regional Economics (BITRE)



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## Domestic visitation Year Ending September 2017

### Domestic Visitors to TNQ

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	903,000	-1.6%	4,983,000	-5.7%	5.5	-0.3
VFR	381,000	-4.9%	1,803,000	13.1%	4.7	0.7
Business	385,000	-14.5%	1,537,000	-21.1%	4.0	-0.3
<b>Domestic<sup>3</sup></b>	<b>1,775,000</b>	<b>-2.8%</b>	<b>8,928,000</b>	<b>-2.4%</b>	<b>5.0</b>	<b>0.0</b>
<b>Intrastate</b>						
Holiday	518,000	15.3%	2,046,000	7.3%	4.0	-0.2
VFR	271,000	-2.8%	830,000	4.1%	3.1	0.2
Business	296,000	-13.0%	1,171,000	-23.5%	4.0	-0.5
<b>Intrastate</b>	<b>1,163,000</b>	<b>3.3%</b>	<b>4,373,000</b>	<b>-1.2%</b>	<b>3.8</b>	<b>-0.1</b>
<b>Interstate</b>						
Holiday	386,000	-17.7%	2,936,000	-13.0%	7.6	0.4
VFR	110,000	-9.7%	973,000	22.0%	8.9	2.3
Business	88,000	-18.9%	366,000	-12.2%	4.1	0.3
<b>Interstate</b>	<b>612,000</b>	<b>-12.5%</b>	<b>4,555,000</b>	<b>-3.5%</b>	<b>7.4</b>	<b>0.7</b>

### Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
TNQ	2,260,000	-7.1%	\$251.0m	-10.6%
Queensland	41,295,000	1.0%	\$4,363.8m	1.2%
<b>Australia</b>	<b>191,961,000</b>	<b>1.9%</b>	<b>\$20,420.1m</b>	<b>6.3%</b>

### Key domestic source markets to TNQ

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	230,000	10.4%	1,188,000	-10.7%
Regional Qld	933,000	1.6%	3,184,000	2.9%
Sydney	171,000	-6.1%	875,000	-6.9%
Regional NSW	73,000	20.5%	581,000	32.9%
Melbourne	214,000	20.7%	1,839,000	35.0%
Regional Vic	57,000	-14.8%	556,000	-12.6%

### State Comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	22,110,000	9.7%	85,982,000	8.3%
NSW	31,030,000	7.6%	99,591,000	7.1%
Victoria	23,750,000	10.6%	68,407,000	8.7%
<b>Australia</b>	<b>95,976,000</b>	<b>7.2%</b>	<b>347,274,000</b>	<b>5.9%</b>
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,397,000	1.6%	37,052,000	0.5%
NSW	12,229,000	3.4%	41,941,000	-0.3%
Victoria	10,146,000	5.5%	30,609,000	3.8%
<b>Australia</b>	<b>38,284,000</b>	<b>3.3%</b>	<b>145,635,000</b>	<b>0.6%</b>



## International visitation Year Ending September 2017

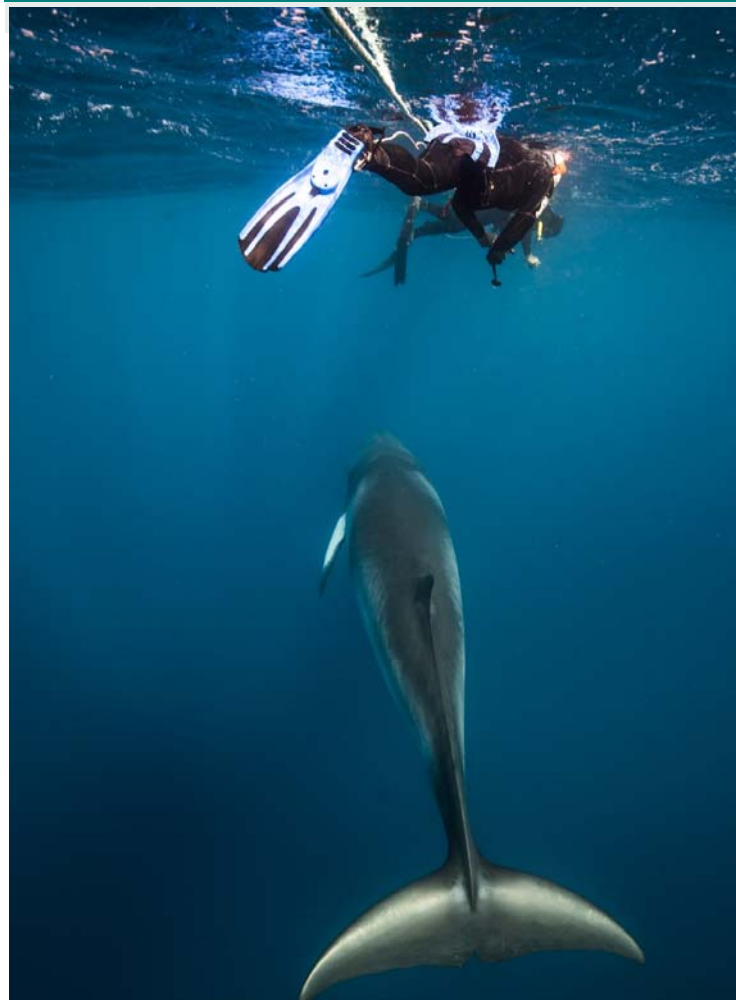
### International Visitors to TNQ

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	830,000	1.9%	5,246,000	-0.7%	6.3	-0.2
VFR	37,000	-1.0%	531,000	-36.1%	14.2	-7.8
Business	15,000	-3.8%	161,000	59.6%	10.4	4.1
<b>Total<sup>3</sup></b>	<b>890,000</b>	<b>1.5%</b>	<b>6,433,000</b>	<b>-2.7%</b>	<b>7.2</b>	<b>-0.3</b>

### State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,628,000	3.0%	53,596,000	1.0%
NSW	4,095,000	8.9%	94,938,000	9.0%
Victoria	2,815,000	7.0%	66,860,000	11.6%
<b>Australia</b>	<b>7,871,000</b>	<b>7.1%</b>	<b>267,014,000</b>	<b>6.6%</b>

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,831,000	2.9%	23,084,000	1.6%
NSW	2,399,000	8.1%	28,170,000	5.6%
Victoria	1,537,000	5.4%	17,305,000	16.7%
<b>Total</b>	<b>4,421,000</b>	<b>6.7%</b>	<b>84,298,000</b>	<b>4.8%</b>



### Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
China	218,000	-0.5%	732,000	5.3%
Japan	109,000	-1.1%	674,000	9.4%
USA	109,000	-4.8%	582,000	-10.4%
UK	96,000	3.5%	790,000	-12.2%
Germany	58,000	15.9%	521,000	13.4%
NZ	42,000	-11.0%	432,000	-30.0%
India	31,000	33.0%	145,000	7.5%
France	21,000	24.3%	263,000	32.4%
Canada	21,000	-5.7%	107,000	-48.4%
Scandinavia	20,000	-7.5%	171,000	-18.6%

For technical reasons, some data may not be publishable (n/p), however the markets will still appear in order.

### Top 10 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
China	214,000	-0.7%	671,000	20.8%
Japan	104,000	-0.7%	597,000	5.9%
USA	102,000	-3.4%	481,000	-10.4%
UK	90,000	4.4%	665,000	-14.9%
Germany	55,000	14.3%	478,000	14.7%
NZ	33,000	-1.9%	275,000	-24.9%
India	30,000	35.2%	131,000	22.0%
France	20,000	22.9%	220,000	34.7%
Scandinavia	19,000	-8.0%	164,000	-19.2%
Canada	19,000	-12.7%	92,000	-50.5%

Regional snapshots for all Queensland regions are available on the TEQ website. Overview snapshots are also available for both Domestic and International visitors. [www.teq.queensland.com](http://www.teq.queensland.com).

If you have any questions or comments, please email [research@queensland.com](mailto:research@queensland.com).

The tourism regions are defined by the Australian Bureau of Statistics (ABS) as a collection of Statistical Area Level 2s (SA2), please refer to the interactive map at <http://stat.abs.gov.au/itt/r.jsp?ABSMaps>

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Year Ending September 2017

## Domestic Regional Comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	% Proportion of Travel Purpose			% Share of Total Visitors
							Holiday %	VFR %	Business %	
Brisbane	6,711,000	15.4%	19,812,000	14.6%	3.0	0.0	25%	40%	26%	30%
Gold Coast	4,164,000	14.3%	14,761,000	9.8%	3.5	-0.2	53%	32%	12%	19%
Sunshine Coast	3,431,000	2.6%	12,283,000	1.5%	3.6	0.0	53%	35%	8%	16%
Fraser Coast*	595,000	1.1%	2,957,000	9.3%	5.0	n/p	49%	34%	13%	3%
Southern Qld Country	2,002,000	14.5%	5,910,000	33.4%	3.0	0.5	29%	38%	25%	9%
SGBR	1,997,000	3.5%	7,172,000	-5.3%	3.6	-0.3	34%	30%	26%	9%
Mackay*	908,000	8.4%	3,506,000	11.2%	3.9	n/p	17%	21%	53%	4%
Whitsundays*	472,000	-2.1%	2,303,000	3.1%	4.9	n/p	53%	17%	27%	2%
Townsville	1,045,000	-10.2%	3,434,000	-19.9%	3.3	-0.4	33%	24%	31%	5%
Outback*	859,000	9.5%	3,538,000	4.8%	4.1	n/p	28%	18%	45%	4%
<b>TNQ</b>	<b>1,775,000</b>	<b>-2.8%</b>	<b>8,928,000</b>	<b>-2.4%</b>	<b>5.0</b>	<b>0.0</b>	<b>51%</b>	<b>21%</b>	<b>22%</b>	<b>8%</b>
<b>Total Domestic</b>	<b>22,110,000</b>	<b>9.7%</b>	<b>85,982,000</b>	<b>8.3%</b>	<b>3.9</b>	<b>0.0</b>	<b>38%</b>	<b>34%</b>	<b>23%</b>	<b>-</b>

\* Three year trend change %<sup>2</sup>

## International Regional Comparison

Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	% Proportion of Travel Purpose			% Share of Total Visitors
							Holiday %	VFR %	Business %	
Brisbane	1,237,000	4.6%	25,731,000	4.0%	20.8	-0.1	54%	29%	9%	47%
Gold Coast	1,056,000	4.2%	9,760,000	-9.0%	9.2	-1.3	80%	15%	3%	40%
Sunshine Coast	294,000	8.2%	3,151,000	5.6%	10.7	-0.3	78%	18%	3%	11%
Fraser Coast	151,000	10.7%	736,000	12.0%	4.9	0.1	94%	6%	0%	6%
Southern Qld Country*	46,000	2.4%	1,372,000	0.3%	29.5	n/p	46%	36%	9%	2%
SGBR	157,000	18.3%	2,711,000	22.7%	17.3	0.6	76%	12%	7%	6%
Mackay*	50,000	3.5%	457,000	-13.8%	9.2	n/p	74%	17%	4%	2%
Whitsundays	247,000	8.2%	1,292,000	-14.6%	5.2	-1.4	96%	2%	1%	9%
Townsville	138,000	10.5%	1,367,000	-15.8%	9.9	-3.1	82%	11%	3%	5%
Outback*	27,000	-2.9%	576,000	-4.2%	21.3	n/p	72%	14%	6%	1%
<b>TNQ</b>	<b>890,000</b>	<b>1.5%</b>	<b>6,433,000</b>	<b>-2.7%</b>	<b>7.2</b>	<b>-0.3</b>	<b>93%</b>	<b>4%</b>	<b>2%</b>	<b>34%</b>
<b>Total International</b>	<b>2,628,000</b>	<b>3.0%</b>	<b>53,596,000</b>	<b>1.0%</b>	<b>20.4</b>	<b>-0.4</b>	<b>70%</b>	<b>24%</b>	<b>7%</b>	<b>-</b>

### Notes/Sources:

In 2012, the Australian Bureau of Statistics (ABS) changed the way it reports regional statistics. Essentially, the ABS moved from using political boundaries such as local government areas to a framework based on population densities, called the ASGS (Australian Statistical Geographic Standard). SA2's (Statistical Area 2) which represent one level of the ASGS replace local government areas (LGA) previously used to define tourism region boundaries. SA2 boundaries closely resemble that of the former tourism region boundaries (defined by LGA boundaries) in Queensland with any differences not being material.

The data included in this report is sourced from the National and International Visitor Surveys (NVS & IVS) conducted by Tourism Research Australia (TRA). These are large and comprehensive surveys that provide valuable data on a national, state, and regional level. The variable nature of travel, combined with sampling variability (which all surveys are subject to) means that regional results need to be viewed as indicative only. It is likely that not all segments of the region will experience the changes noted on a regional level.

In 2014 TRA moved to a new methodology for the NVS that included mobile phone interviewing as part of a dual frame overlap survey. This initiative was part of TRA's continuous improvement program. The inclusion of mobile phone users ultimately delivers greater domestic tourism data accuracy as it better reflects the Australian resident population and phone ownership.

The 2014 and 2015 NVS data, including the data for the year ending June 2016, has been back-cast by TRA.

Please visit [tra.gov.au](http://tra.gov.au) for more information on the methodology, back-casting process and impact on results.

'n/p' indicates the data has not been published.

### Footnotes:

1. Annual change refers to the percentage change between the year to the date covered by this report compared to the same period one year prior.
2. Trend change refers to the percentage change between the average of the three years to the date covered by this report, compared to the average for the same period one year prior. Trend change has been used to analyse changes for regions with small sample sizes.
3. This figure includes "Other" visitors.