

International Tourism Snapshot

Year ending December 2017

International visitors to Australia

| | Visitors | Annual change ¹ | Avg stay ² | Annual change |
|-------------------------------------|------------------|----------------------------|-----------------------|---------------|
| Total Australia ³ | 7,999,000 | 6.2% | 33.1 | -1.3% |
| NZ | 1,196,000 | -0.1% | 10.7 | -13.4% |
| Asia ⁴ | 3,939,000 | 9.1% | 38.0 | -0.3% |
| North America ⁵ | 861,000 | 8.4% | 21.9 | -10.6% |
| Europe ⁶ | 823,000 | 2.7% | 46.3 | -0.9% |
| UK | 681,000 | 2.5% | 34.7 | -3.0% |

| Total holiday | 4,447,000 | 5.0% | 18.9 | -0.7% |
|----------------------|------------------|-------------|-------------|--------------|
| NZ | 490,000 | -1.4% | 7.5 | -9.4% |
| Asia | 2,292,000 | 8.6% | 15.5 | -5.3% |
| North America | 496,000 | 4.6% | 15.2 | -7.1% |
| Europe | 554,000 | 0.2% | 38.5 | 8.3% |
| UK | 400,000 | 1.4% | 28.0 | 0.3% |

| Total VFR ⁷ | 3,064,000 | 8.5% | 23.0 | -1.5% |
|-------------------------------|------------------|-------------|-------------|--------------|
| NZ | 548,000 | 1.2% | 9.9 | -3.7% |
| Asia | 1,268,000 | 12.0% | 30.3 | -5.1% |
| North America | 311,000 | 14.9% | 17.1 | 0.9% |
| Europe | 305,000 | 5.9% | 19.9 | -0.7% |
| UK | 408,000 | 5.0% | 19.2 | -1.3% |

| Total business | 991,000 | 13.2% | 10.2 | -11.5% |
|-----------------------|----------------|--------------|-------------|---------------|
| NZ | 224,000 | 6.2% | 4.8 | -21.2% |
| Asia | 405,000 | 16.0% | 11.8 | -13.9% |
| North America | 150,000 | 18.0% | 11.3 | -17.2% |
| Europe | 96,000 | 18.6% | 12.0 | -10.7% |
| UK | 61,000 | 5.7% | 15.5 | 31.2% |

| Total education | 601,000 | 10.2% | 120.6 | 1.7% |
|------------------------|----------------|--------------|--------------|-------------|
| NZ | 21,000 | -15.6% | 36.9 | 3.3% |
| Asia | 425,000 | 16.4% | 132.7 | 2.6% |
| North America | 34,000 | -0.1% | 60.3 | -24.7% |
| Europe | 53,000 | -6.5% | 99.7 | -3.7% |
| UK | 13,000 | -1.7% | 84.0 | -3.4% |

Australia nears eight million

Australia welcomed 7,999,000 international visitors in the year ending December 2017. This set a new visitation record and represents 6.2% growth year on year. Visitation increased for each of Australia's states and territories, except Western Australia.

Visitor numbers grew from most of Australia's key source markets. Asian markets led the way, with visitation growth of 9.1%. China was a key driver of this growth, with visitation up by 11.8%, while the Indian and Hong Kong markets also experienced double-digit growth. North America had the next fastest growth, up by 8.4%, with 52,000 more visitors from USA and 14,000 more from Canada. Visitation from European markets grew moderately, up by 2.6% overall. Visitation from the UK specifically was up by 2.5% to 681,000 visitors in the year ending December 2017. NZ visitation was stable (-0.1%) at 1.2m visitors for the second year-ending-quarter in a row.

International expenditure in Australia grew by 8.2% to a record \$28.4bn. As with visitation, the Asian markets were primarily driving growth. Asian market expenditure grew by 13.3% to \$17.5bn and accounted for 61.5% of total expenditure, up from 58.8% in the same period a year ago. China accounted for over half (57%) of the growth in total expenditure, with an extra \$1.2bn spent in Australia by Chinese visitors in the year ending December 2017.

Total international expenditure grew slightly faster than visitation (8.2% vs. 6.2% respectively) as visitors spent slightly more (+3.2%) per night. The average length of stay remained stable at 33.1 nights.

Purpose of travel

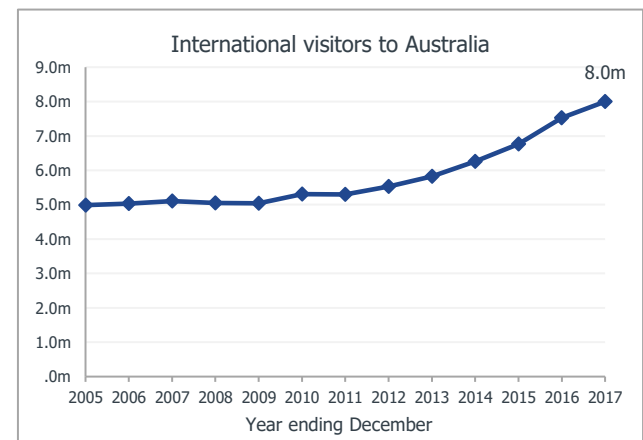
In the year ending December 2017, international visitation grew for all purposes of travel to Australia, except employment. Holidays were the most common reason to visit, with growth of 5.0% to a record 4.4m travellers. The next most popular reason was visiting friends and relatives (VFR) which grew by 8.5% to a record 3.1m visitors. The business and education markets are both smaller in terms of visitor numbers, but recorded the fastest year on year growth. Business travel was up by 13.2% to a record 991,000 visitors and education was up by 10.2% to 601,000 visitors.

Looking at visitor expenditure by travel purpose, we saw that education visitors contributed the most to expenditure growth, up by 14.5% to \$9.9bn. Meanwhile, holiday expenditure grew modestly, by 3.7% to \$10.0bn. Business expenditure grew strongly, up by 17.7% to \$2.1bn, and VFR expenditure grew by 8.9% to \$4.3bn. Employment expenditure declined by 9.3% to \$1.7bn.

The growth in education visitor expenditure was driven almost entirely by Asian markets. China alone accounted for \$948m, or 75%, of the extra \$1.3bn in education visitor expenditure growth in the year ending December 2017.

International visitor expenditure in Australia

| | Expenditure ⁸ | Annual change ¹ |
|------------------------|--------------------------|----------------------------|
| Total Australia | \$28,363.6m | 8.2% |
| Holiday | \$9,979.1m | 3.7% |
| VFR | \$4,271.6m | 8.9% |
| Business | \$2,100.9m | 17.7% |
| Employment | \$1,725.4m | -9.3% |
| Education | \$9,942.1m | 14.5% |



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State expenditure comparison

| | Expenditure | Annual change | Share of expenditure | Spend per visitor |
|------------------------|--------------------|---------------|----------------------|-------------------|
| Total Australia | \$28,363.6m | 8.2% | 100% | \$3,493.6 |
| Queensland | \$5,317.6m | 3.6% | 18.7% | \$1,973.7 |
| New South Wales | \$10,424.0m | 9.5% | 36.8% | \$2,448.8 |
| Victoria | \$7,653.3m | 10.6% | 27.0% | \$2,641.1 |

State visitation comparison

| | Visitors | Annual change | Avg stay | Annual # change |
|------------------------|------------------|---------------|--------------|-----------------|
| Total Australia | 7,999,000 | 6.2% | 33.1 | -0.4 |
| Queensland | 2,684,000 | 4.3% | 19.8 | -0.4 |
| New South Wales | 4,158,000 | 7.4% | 22.7 | 0.1 |
| Victoria | 2,891,000 | 8.1% | 22.9 | -0.6 |
| Other States | 1,935,000 | 4.5% | 26.3 | -0.7 |
| Total holiday | 4,447,000 | 5.0% | 18.9 | -0.1 |
| Queensland | 1,879,000 | 4.4% | 12.6 | 0.1 |
| New South Wales | 2,447,000 | 7.7% | 11.7 | 0.0 |
| Victoria | 1,546,000 | 5.3% | 10.8 | 0.1 |
| Other States | 1,071,000 | 2.8% | 14.1 | -1.2 |
| Total VFR | 3,064,000 | 8.5% | 23.0 | -0.4 |
| Queensland | 645,000 | 8.2% | 18.0 | -1.4 |
| New South Wales | 1,132,000 | 10.8% | 22.2 | 1.1 |
| Victoria | 929,000 | 7.7% | 19.9 | -2.3 |
| Other States | 682,000 | 7.3% | 22.5 | 0.8 |
| Total business | 991,000 | 13.2% | 10.2 | -1.3 |
| Queensland | 184,000 | 11.1% | 7.6 | -1.3 |
| New South Wales | 471,000 | 18.6% | 7.9 | -0.8 |
| Victoria | 324,000 | 13.9% | 8.4 | 0.2 |
| Other States | 197,000 | 5.9% | 11.5 | -3.6 |
| Total education | 601,000 | 10.2% | 120.6 | 2.0 |
| Queensland | 110,000 | 6.9% | 103.8 | -2.5 |
| New South Wales | 223,000 | 9.1% | 119.4 | 2.9 |
| Victoria | 183,000 | 15.6% | 120.5 | 1.5 |
| Other States | 101,000 | 8.3% | 121.5 | 3.6 |

Purpose of travel cont.

The declines seen in employment travel could be a result of a number of changes made to the working visa (subclass 457) program which took effect on 1 July 2017.

Six states set visitation records

International visitation to Australia grew strongly in the year ending December 2017, with record levels of total and holiday visitation in Queensland, New South Wales and Victoria, as well as in South Australia, ACT, and Tasmania. Queensland welcomed a record 2.7m visitors, with year on year growth of 4.3%. New South Wales and Victoria were strong drivers of visitation growth, up by 7.4% and 8.1% respectively.

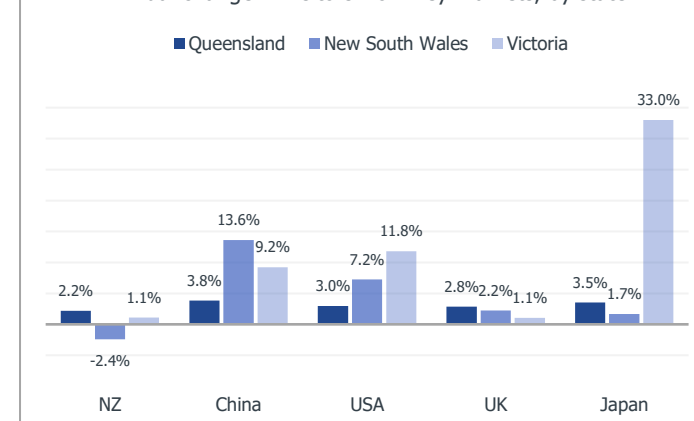
All states except for Western Australia enjoyed growth in visitor expenditure, and five saw expenditure records, these were Queensland, Victoria, South Australia, ACT, and Tasmania.

Queensland's top five visitor markets all recorded visitation growth. These were China, NZ, Japan, UK and USA. Chinese visitation grew to a record high of 503,000, surpassing half a million visitors for the first time.

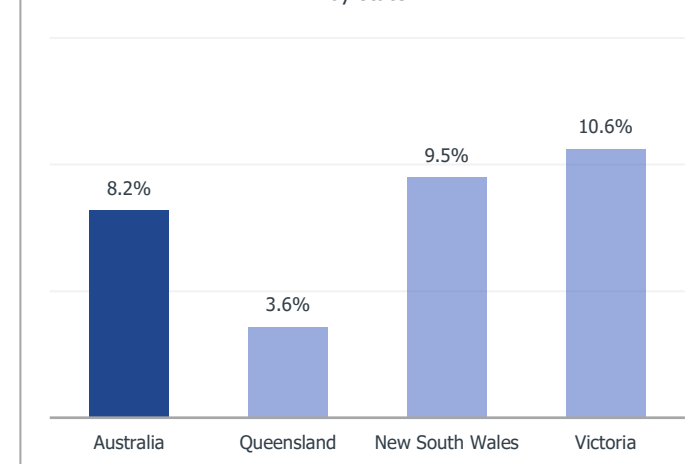
Holiday visitation in Australia grew by 5.0% to a record high of 4.5m visitors. New South Wales and Victoria saw record high levels of holiday visitation, up by 7.7% and 5.3% respectively. It should be noted that two in five (42%) holiday visitors to Australia included Queensland in their itinerary. Holiday travel to Queensland also reached a record high of 1.9m visitors, up by 4.4%.

The growth in education visitor expenditure (i.e. the second largest travel purpose by spend) in Australia was concentrated in New South Wales and Victoria, with 14.6% and 15.9% growth respectively. In Queensland, education expenditure grew by 4.8% to \$1.3bn.

Annual change in visitors from key markets, by state



Annual change in visitor expenditure, by state



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International visitors to Queensland

| | Visitors | Annual change | Avg stay | Annual # change |
|-------------------------|------------------|---------------|-------------|-----------------|
| Total Queensland | 2,684,000 | 4.3% | 19.8 | -0.4 |
| NZ | 457,000 | 2.2% | 10.5 | -1.2 |
| Asia | 1,199,000 | 4.2% | 21.6 | -0.1 |
| North America | 291,000 | 3.7% | 12.9 | -2.1 |
| Europe | 333,000 | 10.9% | 26.9 | 0.4 |
| UK | 231,000 | 2.8% | 22.3 | 0.6 |

| Holiday | 1,879,000 | 4.4% | 12.6 | 0.1 |
|----------------|------------------|-------------|-------------|------------|
| NZ | 233,000 | 1.3% | 8.1 | -1.4 |
| Asia | 911,000 | 4.0% | 11.1 | 0.0 |
| North America | 209,000 | 2.4% | 8.5 | -1.3 |
| Europe | 270,000 | 10.0% | 21.9 | 2.2 |
| UK | 167,000 | 3.5% | 17.3 | 0.3 |

| VFR | 645,000 | 8.2% | 18.0 | -1.4 |
|---------------|----------------|-------------|-------------|-------------|
| NZ | 200,000 | 4.4% | 9.8 | 0.3 |
| Asia | 183,000 | 14.8% | 26.1 | -7.3 |
| North America | 62,000 | 15.8% | 15.4 | 0.5 |
| Europe | 63,000 | 13.4% | 17.9 | 1.0 |
| UK | 88,000 | 12.8% | 17.1 | 0.9 |

| Business | 184,000 | 11.1% | 7.6 | -1.3 |
|-----------------|----------------|--------------|------------|-------------|
| NZ | 45,000 | 9.4% | 4.7 | -0.3 |
| Asia | 67,000 | 9.2% | 9.5 | -2.7 |
| North America | 25,000 | 2.1% | 9.5 | 2.6 |
| Europe | 17,000 | 23.0% | 6.7 | 0.3 |
| UK | 12,000 | 8.2% | 8.2 | -6.0 |

| Education | 110,000 | 6.9% | 103.8 | -2.5 |
|------------------|----------------|-------------|--------------|-------------|
| NZ | 5,000 | 30.9% | 42.4 | -9.8 |
| Asia | 66,000 | 10.9% | 116.7 | 8.1 |
| North America | 8,000 | -18.8% | 59.7 | -30.3 |
| Europe | 14,000 | 6.7% | 85.1 | -22.5 |
| UK | 3,000 | -9.9% | 110.9 | 29.7 |

Queensland continues its strong performance

International visitation to Queensland grew by 4.3% to a record 2.7m visitors in the year ending December 2017. These visitors spent a record \$5.3bn in the state, up by 3.6% year on year.

A record high 1.9m holiday travellers visited the state and spent a record \$2.8bn. These visitors accounted for 70.0% of all international travellers to Queensland.

The VFR, business and education sectors grew strongly. VFR travel grew by 8.2% to a record 645,000 visitors, business travel grew by 11.1% to 184,000 visitors, and education visitation was up by 6.9% to a record 110,000 visitors. Employment visitation to Queensland declined by 18.2%, which was in line with an 11.8% decline nationally.

Queensland enjoyed record-high levels of visitation from a number of its top ten international markets. China, USA, and India reached record highs in total visitation to Queensland.

Below, we 'deep dive' into several markets of note.

China-Australia Year of Tourism 2017

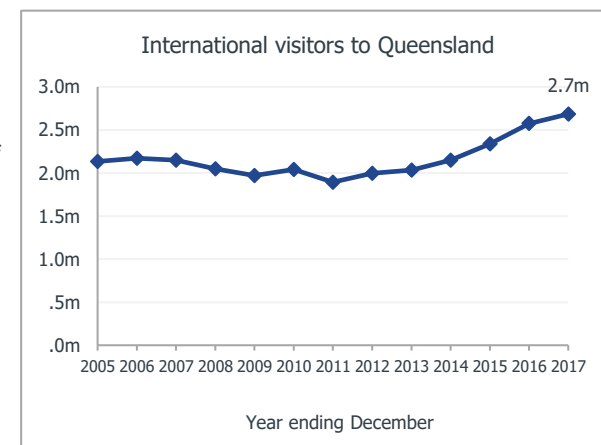
Queensland, along with other states and territories, enjoyed strong growth from China during the China-Australia Year of Tourism 2017. China is Queensland's largest visitor market, with the state welcoming more than half a million visitors for the first time (503,000) in the year ending December 2017. These visitors spent a record \$1.1bn. It is worth noting that expenditure from Chinese education visitors directly contributed \$428m (or 38%) of this \$1.1bn expenditure, and was up 23.6% year on year.

India growing strongly

International visitation from India grew strongly to record highs in both holiday and total visitation, up by 33.6% and 32.0% respectively. Visitor expenditure also grew strongly, with 46.4% growth to \$143.4m in the year ending December 2017. India's strong performance in 2017 has moved its ranking from fourteenth largest market by expenditure to tenth place.

International expenditure in Queensland

| | Expenditure | Annual change |
|-------------------------|-------------------|---------------|
| Total Queensland | \$5,317.6m | 3.6% |
| Holiday | \$2,832.3m | 2.2% |
| VFR | \$650.0m | 9.6% |
| Business | \$249.6m | 7.7% |
| Employment | \$246.6m | -7.7% |
| Education | \$1,277.4m | 4.8% |



Japan keeps momentum

The Japanese market continued to perform strongly. In the year ending December 2017, expenditure grew by 8.4% to \$432.1m. Japan has risen to Queensland's third largest market by expenditure. Japanese expenditure has seen year on year growth since late 2015. The start of this consistent growth aligns with Qantas launching their daily service between Tokyo and Brisbane in August 2015.

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International visitors by region

| | Visitors | Annual change | Avg stay | Holiday visitors | Annual change |
|-------------------------|------------------|---------------|-------------|------------------|---------------|
| Total Queensland | 2,684,000 | 4.3% | 19.8 | 1,879,000 | 4.4% |
| Brisbane | 1,274,000 | 6.7% | 20.2 | 696,000 | 7.6% |
| Gold Coast | 1,069,000 | 4.1% | 9.1 | 852,000 | 4.9% |
| Sunshine Coast | 301,000 | 3.4% | 10.2 | 235,000 | 1.5% |
| Fraser Coast | 150,000 | 1.9% | 4.7 | 139,000 | 1.5% |
| SGBR ⁹ | 151,000 | 6.1% | 17.4 | 118,000 | 5.3% |
| Whitsundays | 241,000 | -2.8% | 5.2 | 233,000 | -2.8% |
| Townsville | 147,000 | 14.3% | 9.1 | 120,000 | 14.6% |
| TNQ | 897,000 | -0.4% | 7.2 | 839,000 | 0.3% |

| | Visitors | Trend change ¹¹ | Avg stay | Holiday visitors | Trend change |
|-------------------|----------|----------------------------|----------|------------------|--------------|
| SQC ¹⁰ | 48,000 | 2.9% | 28.0 | 22,000 | 10.0% |
| Mackay | 50,000 | 3.9% | 8.3 | 38,000 | 7.6% |
| Outback | 21,000 | -10.5% | 22.5 | 15,000 | -6.4% |

Expenditure in Queensland regions

| | Expenditure | Annual change | Spend per visitor | Spend per night |
|-------------------------|-------------------|---------------|-------------------|-----------------|
| Total Queensland | \$5,317.6m | 3.6% | \$1,973.7 | \$100.2 |
| Brisbane | \$2,244.8m | 11.4% | \$1,750.7 | \$87.4 |
| Gold Coast | \$1,227.9m | 2.1% | \$1,146.9 | \$126.7 |
| Sunshine Coast | \$238.2m | -10.8% | \$790.7 | \$77.6 |
| Fraser Coast | \$45.4m | 10.5% | \$301.9 | \$64.4 |
| SGBR ⁹ | \$92.2m | 2.3% | \$553.5 | \$35.0 |
| Whitsundays | \$189.5m | -7.9% | \$786.4 | \$150.8 |
| Townsville | \$103.4m | 20.5% | \$703.3 | \$77.2 |
| TNQ | \$1,078.3m | -4.0% | \$1,202.1 | \$166.7 |

| | Expenditure | Trend change ¹¹ | Spend per visitor | Spend per night |
|-------------------|-------------|----------------------------|-------------------|-----------------|
| SQC ¹⁰ | \$66.2m | -2.5% | \$1,389.9 | \$49.7 |
| Mackay | \$13.7m | n/p | \$275.8 | \$33.4 |
| Outback | \$17.4m | -11.0% | \$811.8 | \$36.1 |



Brisbane

The Brisbane region welcomed a record 1.3m international visitors in the year ending December 2017, with 6.7% year on year growth. Visitation has grown each rolling annual quarter since September 2014. All travel purposes, except employment, recorded growth in the year ending December 2017. Holiday contributed the most, with visitation up by 7.6% to a record 696,000 visitors, while VFR travel grew by 4.3% to a record 358,000. The education and business sectors recorded double-digit growth. International visitors spent slightly more per night which helped to drive regional expenditure to a record high, up by 11.4% to \$2.2bn. Visitation from China, the region's largest market, grew by 7.4%. Visitation from NZ, the second largest market, grew by 11.3%. The Taiwan market also grew strongly, up by 38.8%. This corresponds with a significant increase in aviation seat capacity from Taiwan to Brisbane, up 36% year on year in the year ending December 2017 (source: OAG).

Sunshine Coast

International visitation to the Sunshine Coast grew by 3.4% to a record high of 301,000 in the year ending December 2017. This included a record 235,000 holiday visitors, up by 1.5% year on year. The region's top five source markets were all western markets, with the largest two being New Zealand and the UK. They contributed 65,000 and 60,000 visitors respectively. Visitors average length of stay (ALoS) was relatively stable at 10.2 nights, however, holiday ALoS was down slightly (by 0.3 of a night) and VFR was up (by 0.5 of a night). These changes in ALoS, combined with strong visitation growth in the typically lower spending VFR market (up 13.8%), likely impacted average spend per night which was down by 16.8%, or \$16 a night year on year. This resulted in a softening in total international visitor expenditure to the region, down by 10.8% to \$238.2m.

Tropical North Queensland (TNQ)

International visitation to TNQ was stable (-0.4%) at 897,000 in the year ending December 2017. The number of holiday visitors was at a record high of 839,000 (+0.3% year on year). TNQ is the state's second most popular holiday destination among international visitors. While visitation was stable, expenditure declined by 4.0% to \$1.1bn as the average visitor spend was 3.6% less in the region. The decline in expenditure may be partly due to declines in holiday visitation from New Zealand and China, the region's largest markets. There were 10,000 fewer New Zealand holiday visitors and 12,000 fewer Chinese holiday visitors in the year ending December 2017. The US market accounted for 109,000 holiday visitors, with 2.0% growth. The region also saw growth in holiday visitation from a number of European markets e.g. Germany, Scandinavia and France.

Gold Coast

The Gold Coast region welcomed a record 1.1m visitors in the year ending December 2017, up by 4.1%. The region was Queensland's most popular holiday destination for international visitors, with holiday visitation at a record high of 852,000, up 4.9% year on year. Visitation from China, the Gold Coast's largest market, grew by 5.7% to 309,000 visitors. Several other Asian markets recorded strong growth, while visitation from NZ, the region's second largest market, was stable (-0.9%). Overall, visitor nights in the region remained stable while expenditure grew by 2.1% to \$1.2bn.

Whitsundays

International visitation to the Whitsundays declined by 2.8% to 241,000 visitors in the year ending December 2017. Most visitors were holidaymakers, with holiday visitation down by 2.8% to 233,000. While visitation overall was down, the Whitsundays recorded growth from three of its top five markets, they were Germany, China, and Scandinavia. Overnight visitor expenditure declined by 7.9% to \$189.5m as visitors spent fewer nights in the region, with nights declining 23.9% to 1.3m. This is due to the average length of stay shortening by 1.4 nights compared to a year ago. These overall declines may be in part due to the impact of Tropical Cyclone Debbie which hit the region in late March 2017 and interrupted the operation of many tourism businesses.

Townsville

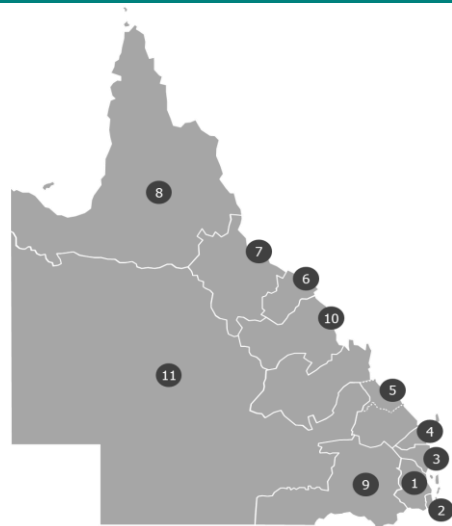
The Townsville region recorded strong growth in international visitation, up by 14.3% to 147,000, in the year ending December 2017. Holiday travel to the region drove overall growth with a 14.6% increase to 120,000 visitors. VFR travel also grew, by 23.5% to 19,000. This growth in visitation combined with a higher average spend per night to deliver 20.5% growth in expenditure to \$103.4m. The UK and Germany remained the region's largest source markets, contributing 28,000 and 27,000 visitors respectively.

Fraser Coast

The Fraser Coast welcomed 150,000 international visitors in the year ending December 2017, up by 1.9% year on year. This boosted expenditure by 10.5% to \$45.4m. The majority (92.5%) of the region's visitors were holidaymakers, whose numbers increased by 1.5% to 139,000. The region's holidaymakers are predominately from Europe (incl. the UK), with this market growing 4.3% to 113,000 visitors in the year ending December 2017. The two largest source markets were the UK and Germany, contributing 34,000 and 31,000 visitors respectively.

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Southern Great Barrier Reef (SGBR)

International visitation to SGBR increased by 6.1% in the year ending December 2017, driven by growth in visitation SGBR's two largest markets: they are the UK and Germany. Holiday visitors contributed the most to visitor growth with a 5.3% increase to 118,000 visitors. While visitor nights grew by 26.9% to 2.6m, the number of holiday nights were stable. The average spend per night declined by 19.4%. This is likely due to the growth in nights for VFR and other non-holiday purposes which are generally lower spending. This counteracted the nights growth to keep expenditure growth at 2.3%, to \$92.2m.

Southern Queensland Country (SQC)

In the three years ending December 2017, SQC saw 2.9% growth to 48,000 international visitors. This visitation growth primarily came from the holiday market, while the VFR market also grew. International visitors to the region shortened their stays slightly, by 2.8%. This resulted in nights remaining stable (-0.4%), despite the growth in visitation. Looking at the region's source markets, SQC welcomed 14,000 visitors from Europe (including the UK) and 12,000 from Asia.

Mackay

The Mackay region enjoyed 3.9% visitation growth in the three years ending December 2017, welcoming 50,000 visitors. Holiday travel drove the rise in visitors, with 7.6% growth to 38,000 over the same period. Germany remained the largest source market, with a 21.6% increase to 9,000 visitors (three-year trend). Over the past three years, the average length of stay shortened among both holiday and VFR visitors, and this contributed to an 11.5% decline in total visitor nights.

Outback





















The Outback Queensland region saw 21,000 international visitors, representing a 10.5% decline over the three years ending December 2017. The decline in visitation resulted in declines in both nights and expenditure over the same period. However, the number of holiday nights in the region was stable and the average length of holiday trips rose to 18.8 nights. In the year ending December 2017, Outback Queensland welcomed 11,000 visitors from its largest source market, Europe (including the UK). This market accounted for over half (52%) of international visitors to the region.

International visitors by region and source market

| | China | | Europe (excl UK) | | Japan | | New Zealand | | North America | | United Kingdom | |
|--------------------------|----------------|---------------|------------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|----------------|---------------|
| | Visitors | Annual change | Visitors | Annual change | Visitors | Annual change | Visitors | Annual change | Visitors | Annual change | Visitors | Annual change |
| Total Queensland | 503,000 | 3.8% | 333,000 | 10.9% | 205,000 | 3.5% | 457,000 | 2.2% | 291,000 | 3.7% | 231,000 | 2.8% |
| 1 Brisbane | 236,000 | 7.4% | 195,000 | 8.4% | 45,000 | 19.4% | 188,000 | 11.3% | 123,000 | -0.6% | 127,000 | 0.5% |
| 2 Gold Coast | 309,000 | 5.7% | 94,000 | 4.1% | 65,000 | 2.2% | 202,000 | -0.9% | 56,000 | 5.4% | 70,000 | -0.2% |
| 3 Sunshine Coast | n/p | n/p | 102,000 | 9.0% | n/p | n/p | 65,000 | -2.2% | 33,000 | 3.3% | 60,000 | 3.2% |
| 4 Fraser Coast | n/p | n/p | 83,000 | 14.7% | n/p | n/p | n/p | n/p | 13,000 | -4.4% | 34,000 | -9.0% |
| 5 SGBR | n/p | n/p | 66,000 | 24.4% | n/p | n/p | 14,000 | -18.7% | 16,000 | -11.3% | 29,000 | 8.2% |
| 6 Whitsundays | 22,000 | 5.5% | 100,000 | 4.6% | 10,000 | 6.7% | n/p | n/p | 26,000 | -23.6% | 53,000 | -2.6% |
| 7 Townsville | n/p | n/p | 74,000 | 23.4% | n/p | n/p | n/p | n/p | 17,000 | 6.3% | 28,000 | 5.0% |
| 8 TNQ | 216,000 | -6.0% | 176,000 | 16.7% | 111,000 | 0.8% | 39,000 | -25.9% | 135,000 | -1.9% | 94,000 | 0.8% |
| 9 SQC ¹¹ | n/p | n/p | 10,000 | -6.6% | n/p | n/p | n/p | n/p | n/p | n/p | n/p | n/p |
| 10 Mackay ¹¹ | n/p | n/p | 25,000 | 11.9% | n/p | n/p | n/p | n/p | n/p | n/p | 8,000 | 8.9% |
| 11 Outback ¹¹ | n/p | n/p | 10,000 | -1.4% | n/p | n/p | n/p | n/p | n/p | n/p | n/p | n/p |

International Tourism Snapshot

Year ending December 2017

| | Queensland | | | | Australia | | | |
|---|------------------|---------------|-------------------|---------------|------------------|---------------|--------------------|---------------|
| | Visitors | Annual change | Expenditure | Annual change | Visitors | Annual change | Expenditure | Annual change |
|  New Zealand | 457,000 | 2.2% | \$552.1m | -7.7% | 1,196,000 | -0.1% | \$1,642.4m | -7.5% |
| Total Asia | 1,199,000 | 4.2% | \$2,760.5m | 6.5% | 3,939,000 | 9.1% | \$17,455.5m | 13.3% |
|  China | 503,000 | 3.8% | \$1,141.7m | 11.7% | 1,245,000 | 11.8% | \$8,118.5m | 17.7% |
|  Japan | 205,000 | 3.5% | \$432.1m | 8.4% | 396,000 | 4.5% | \$1,102.8m | 8.2% |
|  Singapore | 58,000 | -12.0% | \$121.3m | -11.3% | 380,000 | -0.7% | \$1,044.0m | -0.9% |
|  Malaysia | 45,000 | -6.0% | \$102.9m | -15.9% | 351,000 | 1.4% | \$1,076.4m | 10.8% |
|  Korea | 75,000 | 4.4% | \$225.6m | 1.2% | 276,000 | 5.7% | \$1,091.7m | -0.9% |
|  India | 76,000 | 32.0% | \$143.4m | 46.4% | 281,000 | 16.7% | \$1,011.3m | 16.5% |
|  Hong Kong | 66,000 | 3.4% | \$185.5m | 18.3% | 258,000 | 14.0% | \$983.5m | 8.4% |
|  Indonesia | 22,000 | 8.4% | \$35.8m | -29.7% | 168,000 | 9.4% | \$555.5m | -5.4% |
|  Taiwan | 73,000 | 1.4% | \$208.1m | -6.3% | 166,000 | 8.5% | \$688.4m | -1.6% |
|  Thailand | 20,000 | 26.8% | \$54.5m | 18.6% | 90,000 | 6.0% | \$393.0m | 17.9% |
| Other Asia | 57,000 | 4.7% | \$109.6m | -5.9% | 329,000 | 21.7% | \$1,390.4m | 42.7% |
| North America | 291,000 | 3.7% | \$476.5m | -4.7% | 861,000 | 8.4% | \$2,309.9m | -0.3% |
|  USA | 232,000 | 3.0% | \$360.1m | -3.5% | 706,000 | 8.0% | \$1,860.2m | 0.5% |
|  Canada | 59,000 | 6.9% | \$116.4m | -8.3% | 154,000 | 10.3% | \$449.6m | -3.7% |
| Total Europe | 564,000 | 7.4% | \$1,116.1m | 2.7% | 1,504,000 | 2.6% | \$5,136.4m | -0.8% |
|  United Kingdom | 231,000 | 2.8% | \$417.2m | -4.1% | 681,000 | 2.5% | \$2,007.6m | -3.8% |
|  Germany | 91,000 | 3.9% | \$187.2m | 4.6% | 197,000 | 2.0% | \$687.3m | -7.0% |
|  France | 44,000 | 17.3% | \$91.6m | 53.0% | 120,000 | 3.3% | \$472.8m | 14.3% |
|  Scandinavia | 47,000 | 24.5% | \$114.9m | -4.1% | 105,000 | 3.4% | \$395.5m | -5.7% |
|  Italy | 26,000 | 31.0% | \$74.6m | 60.4% | 71,000 | 0.9% | \$354.0m | 9.3% |
|  Switzerland | 22,000 | -5.7% | \$51.6m | -10.4% | 52,000 | 2.8% | \$222.6m | 1.2% |
|  Netherlands | 21,000 | 5.2% | \$36.2m | -20.6% | 52,000 | 5.9% | \$179.8m | -11.8% |
| Other Europe | 82,000 | 10.1% | \$142.9m | -0.1% | 227,000 | 2.4% | \$816.8m | 6.2% |
| Other markets | 173,000 | 1.7% | \$412.4m | 15.9% | 500,000 | 8.3% | \$1,819.5m | 18.6% |
| All markets | 2,684,000 | 4.3% | \$5,317.6m | 3.6% | 7,999,000 | 6.2% | \$28,363.6m | 8.2% |

Notes:

- Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior
- Avg stay = average length of stay expressed in nights
- Total includes those visitors classified as 'Other'. Therefore, the sum of Holiday, VFR, Business and Education visitors may not equal to 'Total'
- Asia includes Japan, China, Korea, Singapore, Malaysia, Hong Kong, India, Indonesia, Taiwan, Thailand and Other Asia
- North America includes United States of America and Canada
- Europe includes Germany, France, Scandinavia, Netherlands, Italy, Switzerland and Other Europe
- Visiting friends or relatives (VFR)
- All expenditure figures include package expenditure
- SGBR - Southern Great Barrier Reef region is comprised of the Capricorn, Bundaberg and Gladstone regions
- SQC - Southern Queensland Country region is comprised of Toowoomba, Southern and Western Downs regions
- 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

Other notes:

- Expenditure estimates should be used with caution
- "n/p" = not published for technical reasons
- For this publication data has been adjusted to conform to Tourism and Events Queensland's regional definitions, which may differ slightly from ABS Tourism Regions

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Data Source:

International Visitor Survey (IVS), Tourism Research Australia. The information included in this report was extracted from the IVS conducted 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.

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