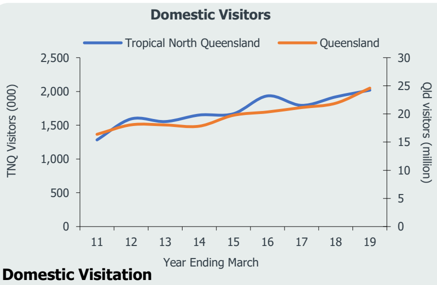
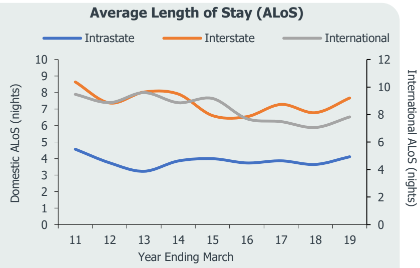
Tropical North Queensland Regional Snapshot

Year Ending March 2019

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	**2,019,000**	**1,003,000**	**506,000**	**453,000**	**$2,267.8m**
Annual % change[1]	▲ 5.2%	▲ 1.2%	▲ 21.4%	▲ 19.7%	▲ 8.4%
3-yr trend % change[2]	▲ 1.5%	▼ -1.7%	▲ 9.6%	● 0.2%	▲ 3.5%
International Overnight	**849,000**	**778,000**	**44,000**	**21,000**	**$1,077.1m**
Annual % change	▼ -3.1%	▼ -4.2%	▼ -1.3%	▲ 2.5%	▲ 2.7%
3-yr trend % change	▲ 2.0%	▲ 1.6%	▲ 1.7%	▲ 12.5%	▲ 0.8%
TOTAL	**2,868,000**	**1,781,000**	**550,000**	**474,000**	**$3,344.9m**
Annual % change	▲ 2.6%	▼ -1.2%	▲ 19.2%	▲ 18.8%	▲ 6.5%
3-yr trend % change	▲ 1.6%	● -0.2%	▲ 8.8%	▲ 0.7%	▲ 2.6%





Domestic Visitation

▪ There were 2.0 million domestic overnight visitors to Tropical North Queensland (TNQ) in the year ending March 2019. Over the same period, visitor expenditure grew by 8.4% to $2.3bn. Domestic visitation represents around 7 in 10 of both overnight visitation (70%) and expenditure (68%) in the region.

▪ Overnight expenditure grew faster than overnight visitation due to an increase in average length of stay by 0.6 nights to 5.3 night. Total visitor nights increased by 17.8% to a record 10.7 million. Average spend per night decreased by $18 to $211/night.

▪ Visiting friends and relatives (VFR, up 21.4% to a record 506,0000 visitors) and business travel (up 19.7% to 453,000) grew particularly strongly over the year. Holiday visitation, which accounts for half (50%) of visitors to the region, was steady (up 1.2%) at 1.0 million visitors.

▪ Intrastate visitation represents 66% of the domestic market and grew by 7.3% over the year to a record 1.3 million. The record number of intrastate visitors was due to VFR (up 28.9% to a record 401,000) and business travel (up 33.6% to 378,000). The top intrastate markets are intraregional travellers (653,000), Brisbane (253,000) and Townsville (191,000).

▪ Interstate visitation was steady (up 1.3%) at 687,000 over the year ending March 2019. Tropical North Queensland's largest interstate markets are Melbourne (231,000, up 31.8%) and Sydney (184,000, up 11.3%).

▪ The TNQ result for the year ending March 2019 was largely driven by strong June quarter performance and visitation has been steady/negative since. In the most recent quarters, holiday visitation has decreased but there has been a large increase in VFR visitation.

International Visitation

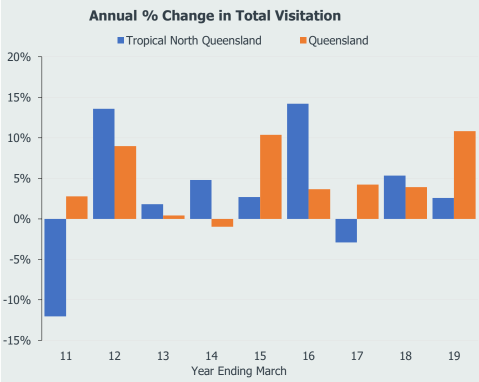
▪ In the year ending March 2019, there were 849,000 international visitors to the TNQ region, down 3.1% year on year. Over the same period, international overnight visitor expenditure increased by 2.7% to $1.1bn.

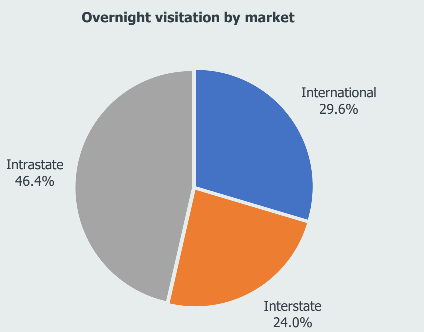
▪ Average length of stay increased by 0.8 nights to 7.8 nights and total visitor nights increased by 7.5% to 6.6 million. Average spend per night decreased by $8 to $162/night.

▪ Holidaymakers represent 92% of international visitors to TNQ with 778,000 (down 4.2%) visitors over the year to March 2019. Over the same period, VFR was steady (down 1.3%) to 44,000 visitors and business visitation increased by 2.5% to 21,000.

▪ Among the largest markets: visitation grew from the United States of America (up 7.5% to a record 116,000); was steady from China (up 0.7% to 206,000) and Japan (down 0.6% to 110,000); but fell from the United Kingdom (down 9.8% to 79,000) and Germany (down 18.6% to 44,000).

▪ Outside of the top 5 markets there was strong growth in visitation from New Zealand (up 11.4% to 41,000) and Canada (up 20.6% to 26,000 visitors).





New National Visitor Survey methodology, 2019

Tourism Research Australia has transitioned NVS sampling to 100% mobile phone interviews (from 50% mobile phone/50% landline) to reflect current phone usage trends. The change in methodology has seen a break in series, so please use with caution when comparing 2019 results with previous time periods.

Note that 2017 and 2018 estimates have been revised to align with the latest release of ABS population projections and will differ slightly from previously published estimates.

Research Updates

To receive an email alert whenever new tourism figures are released click here

Tropical North Queensland Regional Snapshot

Domestic visitation Year Ending March 2019

Domestic visitors to Tropical North Queensland

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	1,003,000	1.2%	5,808,000	4.7%	5.8	0.2
VFR	506,000	21.4%	2,473,000	55.5%	4.9	1.1
Business	453,000	19.7%	2,251,000	51.0%	5.0	1.0
Domestic[3]	**2,019,000**	**5.2%**	**10,744,000**	**17.8%**	**5.3**	**0.6**
Intrastate						
Holiday	516,000	-3.1%	1,929,000	-9.3%	3.7	-0.3
VFR	401,000	28.9%	1,456,000	48.1%	3.6	0.5
Business	378,000	33.6%	1,950,000	86.3%	5.2	1.5
Intrastate	**1,332,000**	**7.3%**	**5,474,000**	**21.0%**	**4.1**	**0.5**
Interstate						
Holiday	487,000	6.1%	3,879,000	13.4%	8.0	0.5
VFR	105,000	-0.8%	1,017,000	67.6%	9.7	4.0
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	**687,000**	**1.3%**	**5,270,000**	**14.6%**	**7.7**	**0.9**

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
Tropical North Queensland	2,916,000	21.3%	$491.m	61.5%
Queensland	46,689,000	12.7%	$5,218.m	14.9%
Australia	**218,369,000**	**11.0%**	**$23,522.9m**	**12.4%**

Key domestic source markets to Tropical North Queensland

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	253,000	-3.3%	1,555,000	12.3%
Regional Qld	1,079,000	10.1%	3,919,000	24.8%
Sydney	184,000	11.3%	1,101,000	39.6%
Regional NSW	82,000	n/p	715,000	n/p
Melbourne	231,000	31.8%	1,827,000	42.4%
Regional Vic	n/p	n/p	n/p	n/p

State comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	24,584,000	12.2%	97,052,000	11.6%
NSW	35,606,000	7.9%	111,371,000	8.3%
Victoria	27,832,000	11.8%	78,965,000	12.6%
Australia	**109,051,000**	**10.1%**	**386,162,000**	**9.8%**

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,530,000	9.6%	42,266,000	7.5%
NSW	14,056,000	6.9%	47,962,000	6.9%
Victoria	11,693,000	9.2%	33,453,000	5.5%
Australia	**43,708,000**	**9.8%**	**164,362,000**	**7.2%**

Tropical North Queensland Regional Snapshot

International visitation Year Ending March 2019

International visitors to Tropical North Queensland

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	778,000	-4.2%	4,988,000	-0.6%	6.4	0.2
VFR	44,000	-1.3%	799,000	42.3%	18.2	5.6
Business	21,000	2.5%	117,000	-14.4%	5.7	-1.1
Total[3]	**849,000**	**-3.1%**	**6,648,000**	**7.5%**	**7.8**	**0.8**

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,738,000	-0.3%	54,366,000	1.4%
NSW	4,346,000	0.3%	97,418,000	3.2%
Victoria	3,088,000	5.0%	71,690,000	5.6%
Australia	**8,534,000**	**2.7%**	**270,672,000**	**0.8%**

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,848,000	-1.1%	22,710,000	-1.2%
NSW	2,451,000	-0.7%	28,451,000	2.4%
Victoria	1,648,000	7.5%	16,982,000	5.2%
Total	**4,629,000**	**3.5%**	**82,959,000**	**1.5%**

Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
China	206,000	0.7%	901,000	28.4%
USA	116,000	7.5%	605,000	11.8%
Japan	110,000	-0.6%	555,000	-15.9%
United Kingdom	79,000	-9.8%	755,000	0.3%
Germany	44,000	-18.6%	464,000	-15.1%
New Zealand	41,000	11.4%	432,000	2.0%
Canada	26,000	20.6%	193,000	60.8%
India	22,000	-26.9%	134,000	-7.3%
France	22,000	-2.7%	201,000	-23.3%
Scandinavia	19,000	-30.4%	234,000	10.8%

Top 10 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
China	201,000	1.4%	858,000	34.9%
USA	110,000	7.2%	517,000	10.5%
Japan	103,000	-1.5%	460,000	-20.6%
United Kingdom	72,000	-11.0%	539,000	-12.0%
Germany	43,000	-17.1%	408,000	-20.2%
New Zealand	32,000	24.1%	255,000	-3.7%
Canada	25,000	24.6%	175,000	60.1%
France	21,000	-2.2%	170,000	-22.8%
India	20,000	-32.8%	60,000	-55.0%
Scandinavia	17,000	-33.5%	108,000	-42.4%

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.

If you have any questions or comments, please email 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

Regional Comparison

Year Ending March 2019

Domestic regional comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	% Proportion of Travel Purpose: Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	7,625,000	9.9%	22,030,000	4.3%	2.9	-0.2	28%	38%	25%	31%
Gold Coast	4,002,000	16.8%	15,785,000	22.4%	3.9	0.2	53%	29%	14%	16%
TNQ	**2,019,000**	**5.2%**	**10,744,000**	**17.8%**	**5.3**	**0.6**	**50%**	**25%**	**22%**	**8%**
Sunshine Coast	3,855,000	15.0%	13,431,000	11.7%	3.5	-0.1	55%	34%	9%	16%
SGBR	2,218,000	9.3%	8,348,000	13.9%	3.8	0.2	33%	27%	32%	9%
SQC	2,192,000	8.9%	5,979,000	5.9%	2.7	-0.1	26%	41%	25%	9%
Townsville	1,427,000	31.9%	4,878,000	35.6%	3.4	0.1	34%	29%	29%	6%
Outback*	965,000	7.5%	5,151,000	16.3%	5.3	n/p	33%	18%	46%	4%
Whitsundays*	646,000	10.2%	3,112,000	14.5%	4.8	n/p	63%	16%	21%	3%
Fraser Coast*	739,000	6.8%	2,905,000	7.9%	3.9	n/p	53%	34%	8%	3%
Mackay*	1,002,000	7.0%	3,997,000	12.9%	4.0	n/p	22%	21%	52%	4%
Total Queensland	**24,584,000**	**12.2%**	**97,052,000**	**11.6%**	**3.9**	**0.0**	**39%**	**33%**	**24%**	**100%**

** Three-year trend change %[2]*

International regional comparison

Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	% Proportion of Travel Purpose: Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	1,411,000	4.5%	27,579,000	2.6%	19.5	-0.3	52%	31%	9%	52%
Gold Coast	1,027,000	-2.1%	9,744,000	-0.6%	9.5	0.1	78%	15%	4%	38%
TNQ	**849,000**	**-3.1%**	**6,648,000**	**7.5%**	**7.8**	**0.8**	**92%**	**5%**	**2%**	**31%**
Sunshine Coast	309,000	0.9%	2,885,000	-3.1%	9.3	-0.4	76%	21%	2%	11%
SGBR	140,000	-8.8%	1,632,000	-28.8%	11.7	-3.3	78%	14%	4%	5%
SQC*	57,000	9.6%	1,578,000	0.9%	27.8	n/p	37%	32%	16%	2%
Townsville	132,000	-11.0%	1,486,000	20.2%	11.2	2.9	82%	14%	3%	5%
Outback*	28,000	-2.5%	459,000	-5.7%	16.3	n/p	70%	15%	5%	1%
Whitsundays	226,000	-6.3%	1,407,000	11.1%	6.2	1.0	97%	3%	0%	8%
Fraser Coast	128,000	-10.0%	571,000	-15.7%	4.5	-0.3	92%	7%	0%	5%
Mackay*	52,000	7.7%	361,000	-14.3%	6.9	n/p	74%	20%	5%	2%
Total Queensland	**2,738,000**	**-0.3%**	**54,366,000**	**1.4%**	**19.9**	**0.3**	**67%**	**26%**	**8%**	**100%**

Notes/Sources:

TNQ= Tropical North Queensland; SGBR = Southern Great Barrier Reef and SQC = Southern Queensland Country

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 Australian Statistical Geographic Standard (ASGS). Statistical Area 2s (SA2s), 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.

Tourism Research Australia has transitioned NVS sampling to 100% mobile phone interview (from 50% mobile phone/50% landline) to refelect current phone usage trends. The change in methodology has seen a break in series so please use caution when comparing 2019 to previous year's results.

2017 and 2018 estimates have been revised to align with the latest release of ABS population projections and will differ slightly from previously published estimates.

'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.