

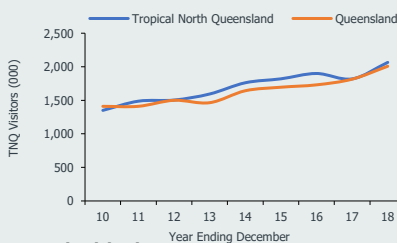
# Tropical North Queensland Regional Snapshot

Year Ending December 2018

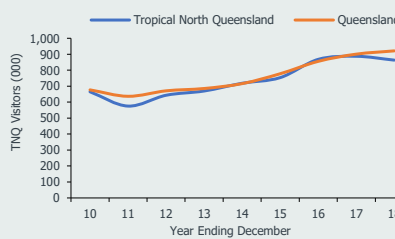


	Visitors	Holiday	VFR	Business	Expenditure (\$m)
<b>Domestic Overnight</b>	<b>2,065,000</b>	<b>1,058,000</b>	<b>493,000</b>	<b>426,000</b>	<b>\$2,382.4m</b>
Annual % change <sup>1</sup>	▲ 13.5%	▲ 11.0%	▲ 21.0%	▲ 18.4%	▲ 17.0%
3-yr trend % change <sup>2</sup>	▲ 4.4%	▲ 3.5%	▲ 9.3%	▼ -1.0%	▲ 7.8%
<b>International Overnight</b>	<b>863,000</b>	<b>786,000</b>	<b>49,000</b>	<b>23,000</b>	<b>\$1,071.1m</b>
Annual % change	▼ -2.7%	▼ -5.0%	▲ 21.3%	▲ 54.3%	● 0.2%
3-yr trend % change	▲ 4.4%	▲ 4.2%	▲ 4.3%	▲ 15.0%	▲ 2.5%
<b>TOTAL</b>	<b>2,928,000</b>	<b>1,844,000</b>	<b>542,000</b>	<b>449,000</b>	<b>\$3,453.5m</b>
Annual % change	▲ 8.2%	▲ 3.6%	▲ 21.0%	▲ 19.9%	▲ 11.2%
3-yr trend % change	▲ 4.4%	▲ 3.8%	▲ 8.8%	● -0.4%	▲ 6.0%

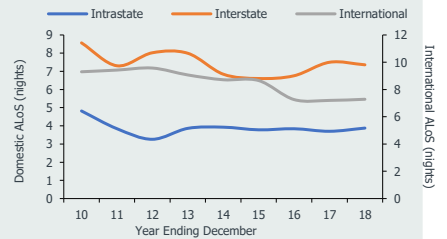
Domestic Visitors



International Visitors



Average Length of Stay (ALoS)



## Domestic Visitation

▪ In 2018 domestic overnight visitation to Tropical North Queensland reached a record 2.1m (up 13.5% year on year). Over the same period, visitor expenditure grew by 17.0% to a record \$2.4bn. Domestic visitation represents around 7 in 10 of both overnight visitation (71%) and expenditure (69%) in the region.

▪ Overnight expenditure grew faster than overnight visitation due to the combined effect of small increases to both average spend per night and average length of stay (ALoS). Average spend per night increased by 1.1% to \$226/night and ALoS increased by 0.1 of a night to 5.1 nights. Total visitor nights in the region increased by 15.7% to a record 10.5m.

▪ Visiting friends and relatives (VFR, up 21.0% to a record 493,000 visitors) and business travel (up 18.4% to 426,000) grew particularly strongly over the year. Holiday visitation, which accounts for more than half (51%) of visitors to the region, grew by 11.0% to 1.1m visitors.

▪ Intrastate visitation represents 65% of the domestic market and grew by 12.1% over the year to 1.3m. VFR (up 24.6% to a record 387,000) and business travel (up 28.2% to 347,000) made particularly strong contributions to intrastate growth, while holiday visitation decreased slightly (by 1.4% to 526,000). The top intrastate markets are intraregional travellers (645,000), Brisbane (260,000) and Townsville (172,000).

▪ Interstate visitation grew by 16.2% to 730,000 over the year ending December 2018. Interstate visitation growth was mostly due to holiday visitation, which increased by 26.8% to a record 532,000. Tropical North Queensland's largest interstate markets are Melbourne (224,000, up 29.1%) and Sydney (202,000, up 32.9%).

▪ The TNQ domestic overnight result for 2018 was largely driven by strong first half performance with second half holiday performance appearing softer than 2017. This is reflected in commercial accommodation, where year on year declines in occupancy rates and revenue were seen from September 2018 (Source: STR).

## International Visitation

▪ In the year ending December 2018, there were 863,000 international visitors to the TNQ region, down 2.7% year on year. Over the same period, international overnight visitor expenditure was steady (+0.2%) at \$1.1bn.

▪ The combination of small increases in both average spend per night and ALoS kept expenditure steady while visitation decreased. Average spend per night increased by 1.7% to \$170 per night and ALoS increased by 0.1 of a night to 7.3 nights. Total nights decreased by 1.6% to 6.3m over the year.

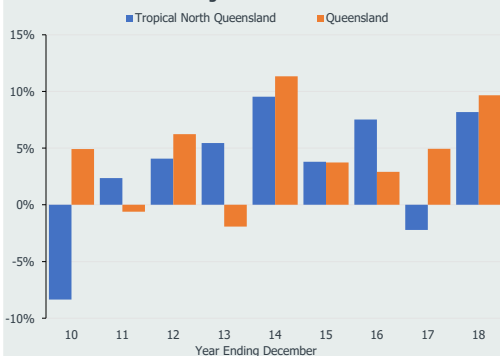
▪ Holidaymakers represent 91% of international visitors to TNQ with 786,000 visitors over the year, representing a 5.0% decrease compared to 2017. Over the same period, VFR increased by 21.3% to a record 49,000 visitors and business visitation increased by 54.3% to 23,000.

▪ Visitation from TNQ's largest market, China, declined by 5.5% to 206,000. Visitation from Japan and the United States of America, the second and third largest markets, was stable at 111,000 (-0.6%) and 109,000 (-0.7%) visitors respectively.

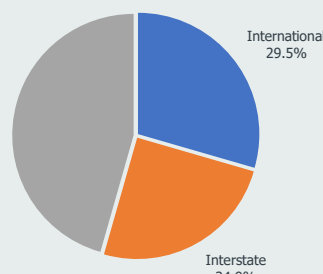
▪ Visitation from the United Kingdom and Germany, the fourth and fifth largest markets declined by 11.5% to 81,000 and 10.7% to 49,000 respectively.

▪ Outside of the top 5 markets, New Zealand visitation grew 4.6% to 40,000 and Canadian visitation grew 16.9% to 25,000 visitors.

Annual % Change in Total Visitation



Overnight visitation by market



## Research Updates

To receive an email alert whenever new tourism figures are released [click here](#)

# Tropical North Queensland Regional Snapshot

## Domestic visitation Year Ending December 2018

### Domestic visitors to Tropical North Queensland

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	1,058,000	11.0%	6,159,000	15.2%	5.8	0.2
VFR	493,000	21.0%	2,297,000	29.7%	4.7	0.3
Business	426,000	18.4%	1,820,000	16.9%	4.3	-0.1
<b>Domestic<sup>3</sup></b>	<b>2,065,000</b>	<b>13.5%</b>	<b>10,548,000</b>	<b>15.7%</b>	<b>5.1</b>	<b>0.1</b>
<b>Intrastate</b>						
Holiday	526,000	-1.4%	2,063,000	1.9%	3.9	0.1
VFR	387,000	24.6%	1,352,000	44.8%	3.5	0.5
Business	347,000	28.2%	1,562,000	39.3%	4.5	0.4
<b>Intrastate</b>	<b>1,335,000</b>	<b>12.1%</b>	<b>5,175,000</b>	<b>17.4%</b>	<b>3.9</b>	<b>0.2</b>
<b>Interstate</b>						
Holiday	532,000	26.8%	4,097,000	23.3%	7.7	-0.2
VFR	106,000	9.5%	946,000	12.8%	8.9	0.3
Business	n/p	n/p	n/p	n/p	n/p	n/p
<b>Interstate</b>	<b>730,000</b>	<b>16.2%</b>	<b>5,373,000</b>	<b>14.0%</b>	<b>7.4</b>	<b>-0.1</b>

### Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Tropical North Queensland	2,513,000	0.9%	\$446.8m	61.6%
Queensland	44,716,000	9.9%	\$5,208.8m	20.0%
<b>Australia</b>	<b>206,051,000</b>	<b>7.4%</b>	<b>\$22,526.1m</b>	<b>10.2%</b>

### Key domestic source markets to Tropical North Queensland

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	260,000	7.3%	1,641,000	35.8%
Regional Qld	1,074,000	13.3%	3,534,000	10.5%
Sydney	202,000	32.9%	1,179,000	64.8%
Regional NSW	84,000	n/p	744,000	n/p
Melbourne	224,000	29.1%	1,769,000	15.9%
Regional Vic	n/p	n/p	n/p	n/p

### State comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	24,086,000	10.6%	94,732,000	9.5%
NSW	34,554,000	9.4%	107,413,000	7.3%
Victoria	25,687,000	5.0%	73,873,000	4.9%
<b>Australia</b>	<b>105,600,000</b>	<b>8.6%</b>	<b>376,087,000</b>	<b>7.2%</b>
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,426,000	9.8%	41,575,000	5.0%
NSW	13,648,000	9.0%	46,347,000	7.1%
Victoria	10,987,000	3.3%	32,481,000	0.6%
<b>Australia</b>	<b>42,364,000</b>	<b>7.6%</b>	<b>160,059,000</b>	<b>3.6%</b>



# Tropical North Queensland Regional Snapshot

## International visitation Year Ending December 2018

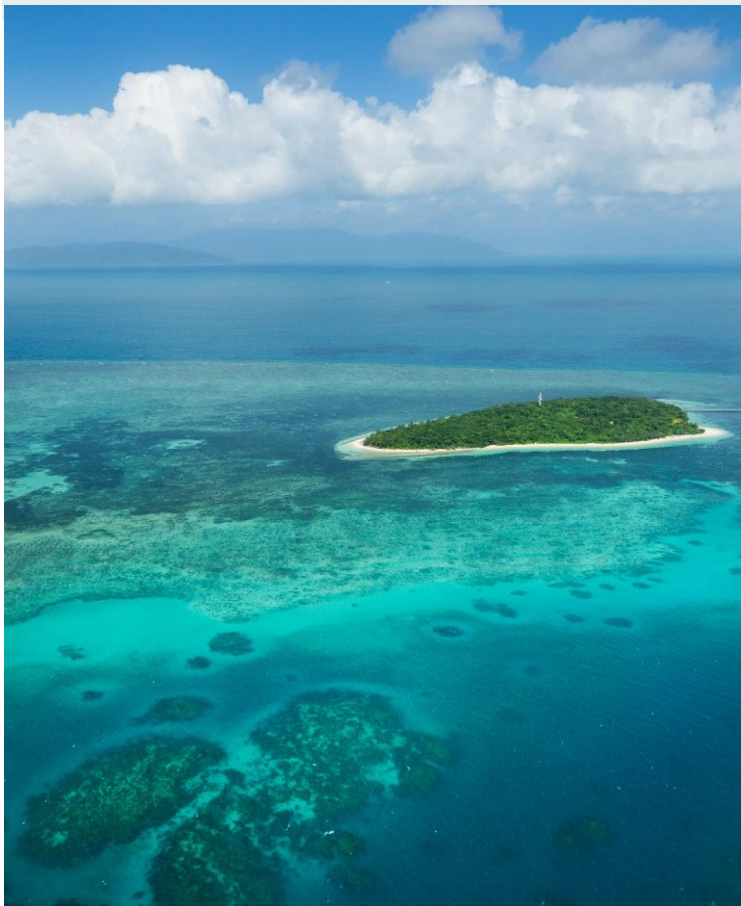
### International visitors to Tropical North Queensland

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	786,000	-5.0%	4,686,000	-11.0%	6.0	-0.4
VFR	49,000	21.3%	734,000	40.5%	15.0	2.1
Business	23,000	54.3%	114,000	-14.6%	5.0	-4.0
<b>Total<sup>3</sup></b>	<b>863,000</b>	<b>-2.7%</b>	<b>6,288,000</b>	<b>-1.6%</b>	<b>7.3</b>	<b>0.1</b>

### State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,763,000	2.3%	55,052,000	3.7%
NSW	4,370,000	3.0%	96,204,000	2.4%
Victoria	3,039,000	5.4%	72,872,000	11.2%
<b>Australia</b>	<b>8,524,000</b>	<b>4.8%</b>	<b>273,793,000</b>	<b>3.8%</b>

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,867,000	1.0%	22,708,000	-1.5%
NSW	2,479,000	3.3%	28,113,000	1.4%
Victoria	1,606,000	6.2%	16,697,000	3.8%
<b>Total</b>	<b>4,623,000</b>	<b>5.8%</b>	<b>82,392,000</b>	<b>1.1%</b>



### Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
China	206,000	-5.5%	668,000	-9.4%
Japan	111,000	-0.6%	608,000	-14.0%
USA	109,000	-0.7%	609,000	16.7%
United Kingdom	81,000	-11.5%	666,000	-19.8%
Germany	49,000	-10.7%	520,000	-1.6%
New Zealand	40,000	4.6%	456,000	17.7%
Canada	25,000	16.9%	168,000	58.0%
Scandinavia	24,000	-5.0%	275,000	27.5%
India	24,000	-20.7%	102,000	-29.6%
France	22,000	-3.5%	215,000	-23.5%

### Top 10 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
China	196,000	-8.6%	596,000	-14.7%
Japan	104,000	-1.2%	485,000	-22.1%
USA	103,000	-1.6%	506,000	9.6%
United Kingdom	74,000	-12.4%	486,000	-26.8%
Germany	47,000	-9.6%	458,000	-4.7%
New Zealand	32,000	16.6%	290,000	24.8%
Canada	24,000	23.1%	151,000	56.4%
India	22,000	-22.3%	65,000	-51.1%
Scandinavia	22,000	-10.3%	147,000	-24.4%
France	21,000	-4.9%	177,000	-27.7%

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>

*Disclaimer:*

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# Regional Comparison



Year Ending December 2018

## 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	7,517,000	8.2%	21,883,000	5.8%	2.9	-0.1	29%	39%	24%	31%
Gold Coast	3,795,000	7.2%	14,664,000	9.0%	3.9	0.1	54%	28%	14%	16%
<b>TNQ</b>	<b>2,065,000</b>	<b>13.5%</b>	<b>10,548,000</b>	<b>15.7%</b>	<b>5.1</b>	<b>0.1</b>	<b>51%</b>	<b>24%</b>	<b>21%</b>	<b>9%</b>
Sunshine Coast	3,684,000	8.6%	12,896,000	4.8%	3.5	-0.1	54%	35%	9%	15%
SGBR	2,176,000	13.6%	8,286,000	22.8%	3.8	0.3	35%	25%	33%	9%
SQC	2,205,000	12.7%	5,893,000	6.5%	2.7	-0.2	27%	41%	24%	9%
Townsville	1,378,000	28.3%	4,797,000	33.3%	3.5	0.1	34%	30%	27%	6%
Outback *	884,000	3.1%	4,876,000	12.2%	5.5	n/p	35%	16%	45%	4%
Whitsundays *	651,000	11.8%	2,995,000	14.3%	4.6	n/p	62%	12%	25%	3%
Fraser Coast *	772,000	9.5%	3,135,000	11.7%	4.1	n/p	53%	33%	10%	3%
Mackay *	1,046,000	9.5%	4,133,000	13.4%	4.0	n/p	21%	21%	54%	4%
<b>Total Queensland</b>	<b>24,086,000</b>	<b>10.6%</b>	<b>94,732,000</b>	<b>9.5%</b>	<b>3.9</b>	<b>0.0</b>	<b>39%</b>	<b>33%</b>	<b>23%</b>	<b>100%</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	1,400,000	6.3%	28,718,000	9.7%	20.5	0.6	52%	31%	10%	51%
Gold Coast	1,047,000	1.2%	10,021,000	7.8%	9.6	0.6	78%	15%	4%	38%
<b>TNQ</b>	<b>863,000</b>	<b>-2.7%</b>	<b>6,288,000</b>	<b>-1.6%</b>	<b>7.3</b>	<b>0.1</b>	<b>91%</b>	<b>6%</b>	<b>3%</b>	<b>31%</b>
Sunshine Coast	311,000	3.6%	2,778,000	-9.6%	8.9	-1.3	76%	22%	2%	11%
SGBR	146,000	-2.1%	1,710,000	-33.8%	11.7	-5.6	78%	15%	4%	5%
SQC	56,000	7.7%	1,501,000	-3.0%	27.0	n/p	38%	33%	15%	2%
Townsville	136,000	-6.9%	1,264,000	-6.2%	9.3	0.1	85%	13%	2%	5%
Outback *	29,000	-0.2%	541,000	2.3%	18.5	n/p	71%	16%	6%	1%
Whitsundays	234,000	-1.1%	1,294,000	5.6%	5.5	0.4	96%	3%	0%	8%
Fraser Coast	130,000	-12.7%	510,000	-26.7%	3.9	-0.8	93%	6%	1%	5%
Mackay*	56,000	10.5%	418,000	-14.5%	7.4	n/p	77%	20%	4%	2%
<b>Total Queensland</b>	<b>2,763,000</b>	<b>2.3%</b>	<b>55,052,000</b>	<b>3.7%</b>	<b>19.9</b>	<b>0.3</b>	<b>68%</b>	<b>26%</b>	<b>8%</b>	<b>100%</b>

### Notes/Sources:

This release of year ending December 2018 data includes purpose-of-visit information and revisions to IVS estimates from 2005 to 2018. Please note results have been revised back to 2005 and are not to be used or compared to previously published data

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.

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.