

Brisbane Regional Snapshot



Year Ending December 2018



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	7,517,000	2,164,000	2,901,000	1,836,000	\$4,629.7m
Annual % change ¹	▲ 8.2%	▲ 10.8%	▲ 6.8%	▲ 7.7%	▲ 8.5%
3-yr trend % change ²	▲ 7.0%	▲ 8.9%	▲ 3.5%	▲ 8.4%	▲ 8.9%
International Overnight	1,400,000	727,000	427,000	140,000	\$2,734.4m
Annual % change	▲ 6.3%	▲ 5.4%	▲ 7.2%	▲ 17.1%	▲ 21.2%
3-yr trend % change	▲ 6.5%	▲ 8.8%	▲ 5.6%	▲ 6.9%	▲ 12.3%
TOTAL	8,916,000	2,892,000	3,328,000	1,976,000	\$7,364.2m
Annual % change	▲ 7.9%	▲ 9.4%	▲ 6.8%	▲ 8.3%	▲ 12.9%
3-yr trend % change	▲ 6.9%	▲ 8.9%	▲ 3.8%	▲ 8.3%	▲ 10.1%



Domestic Visitors

The Brisbane region welcomed a record 7.5m domestic overnight visitors in the year ending December 2018, with visitation up 8.2% year on year. These visitors spent a record \$4.6bn in the region, up 8.5% year on year.

Holiday, visiting friends and relatives (VFR) and business visitation all reached record levels. Holiday visitation to Brisbane increased 10.8% to 2.2m visitors; VFR visitation grew by 6.8% to 2.9m and business trips increased by 7.7% to 1.8m.

While visitation saw strong growth, average length of stay decreased slightly (by 0.1 of a night) to 2.9 nights, which meant total nights in Brisbane grew (up 5.8%) slightly slower than visitation, but still reached a record 21.9m nights.

The intrastate market, which accounts for 61% of domestic overnight visitation to the region, contributed the majority of the growth in domestic visitors. Intrastate visitation grew by 13.9% to a record 4.6m. Intrastate holiday visitation recorded the strongest growth (up 20.0% to a record 1.5m), but both VFR (up 9.4% to 1.9m) and business visitation (up 10.9% to 722,000) also grew strongly. Intra-regional overnight travel (1.4m visitors) represented the largest share, followed by visitors from the Sunshine Coast (722,000) and Southern Queensland Country (624,000).

Interstate visitation was stable (+0.3%) at 2.9m visitors, accounting for 39% of domestic visitation to the region in the year ending December 2018. Interstate VFR (up 2.3% to 1.0m) and business travel (up 5.8% to 1.1m) grew, but interstate holiday visitation declined (down 5.6% to 658,000). Over half (58%) of interstate visitors came from New South Wales (down 4.1% to 1.7m), while visitation from Victoria grew by 12.7% to 741,000.

International Visitors

Brisbane welcomed a record 1.4m international visitors in the year ending December 2018, up 6.3% on the previous year. The region outpaced Queensland's overall growth rate of 2.3%. Increased international visitation was reflected in Brisbane Airport traffic, with inbound international passenger movements up by 6.4% in the year ending December 2018 (source: BITRE*).

Visitors stayed a record 28.7m nights in the region (up 9.7%) and spent more per night (up 10.5% to \$95/night). The increased nights and spending combined to drive total overnight visitor expenditure growth of 21.2% resulting in a record \$2.7bn in expenditure.

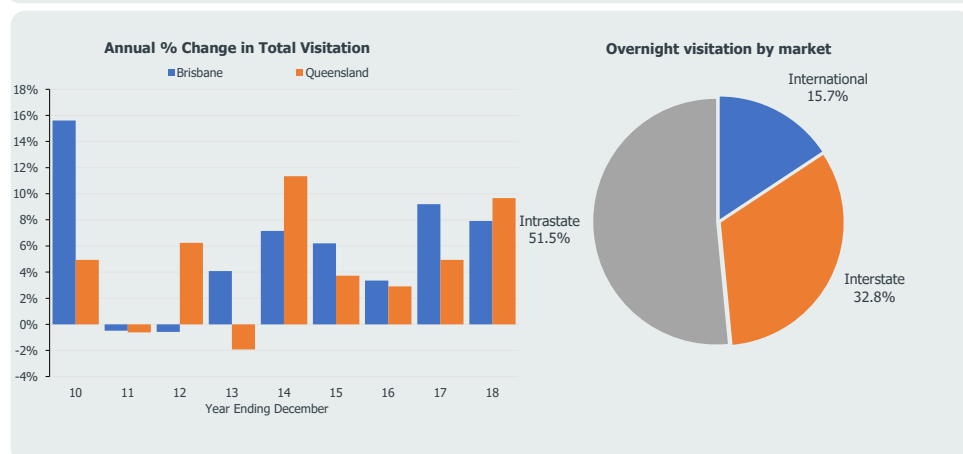
Visitor numbers grew across the key purposes of travel, with holiday visitation growing by 5.4% to 727,000, travel for VFR growing 7.2% to a record 427,000, and business travel growing 17.1% to a record 140,000 visitors.

Brisbane's two largest international markets, China and New Zealand, both helped to drive growth in the region. Chinese visitation grew by 6.9% to 256,000. New Zealand visitation grew by 6.9% to a record 222,000. Brisbane welcomed 128,000 visitors from the third largest market, the UK (stable +0.6%) and a record 105,000 visitors from the fourth largest market, the USA (up 9.0%).

Taiwanese visitation increased by 16.1% to 57,000. As a result, Taiwan became Brisbane's fifth largest market by visitation. This corresponds with a significant increase in Aviation seat capacity from Taiwan to Brisbane, up 25% year on year in the year ending December 2018 (source OAG**).

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

**Official Aviation Guide (OAG)



Research Updates

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

Brisbane Regional Snapshot

Domestic visitation Year Ending December 2018

Domestic visitors to Brisbane

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	2,164,000	10.8%	5,945,000	3.8%	2.7	-0.2
VFR	2,901,000	6.8%	8,980,000	4.3%	3.1	-0.1
Business	1,836,000	7.7%	4,742,000	19.7%	2.6	0.3
Domestic³	7,517,000	8.2%	21,883,000	5.8%	2.9	-0.1
Intrastate						
Holiday	1,506,000	20.0%	3,712,000	20.9%	2.5	0.0
VFR	1,868,000	9.4%	4,315,000	12.2%	2.3	0.1
Business	722,000	10.9%	1,668,000	0.0%	2.3	-0.3
Intrastate	4,595,000	13.9%	11,361,000	8.3%	2.5	-0.1
Interstate						
Holiday	658,000	-5.6%	2,232,000	-16.0%	3.4	-0.4
VFR	1,033,000	2.3%	4,665,000	-2.0%	4.5	-0.2
Business	1,115,000	5.8%	3,074,000	34.0%	2.8	0.6
Interstate	2,922,000	0.3%	10,522,000	3.2%	3.6	0.1

Domestic day trip visitors

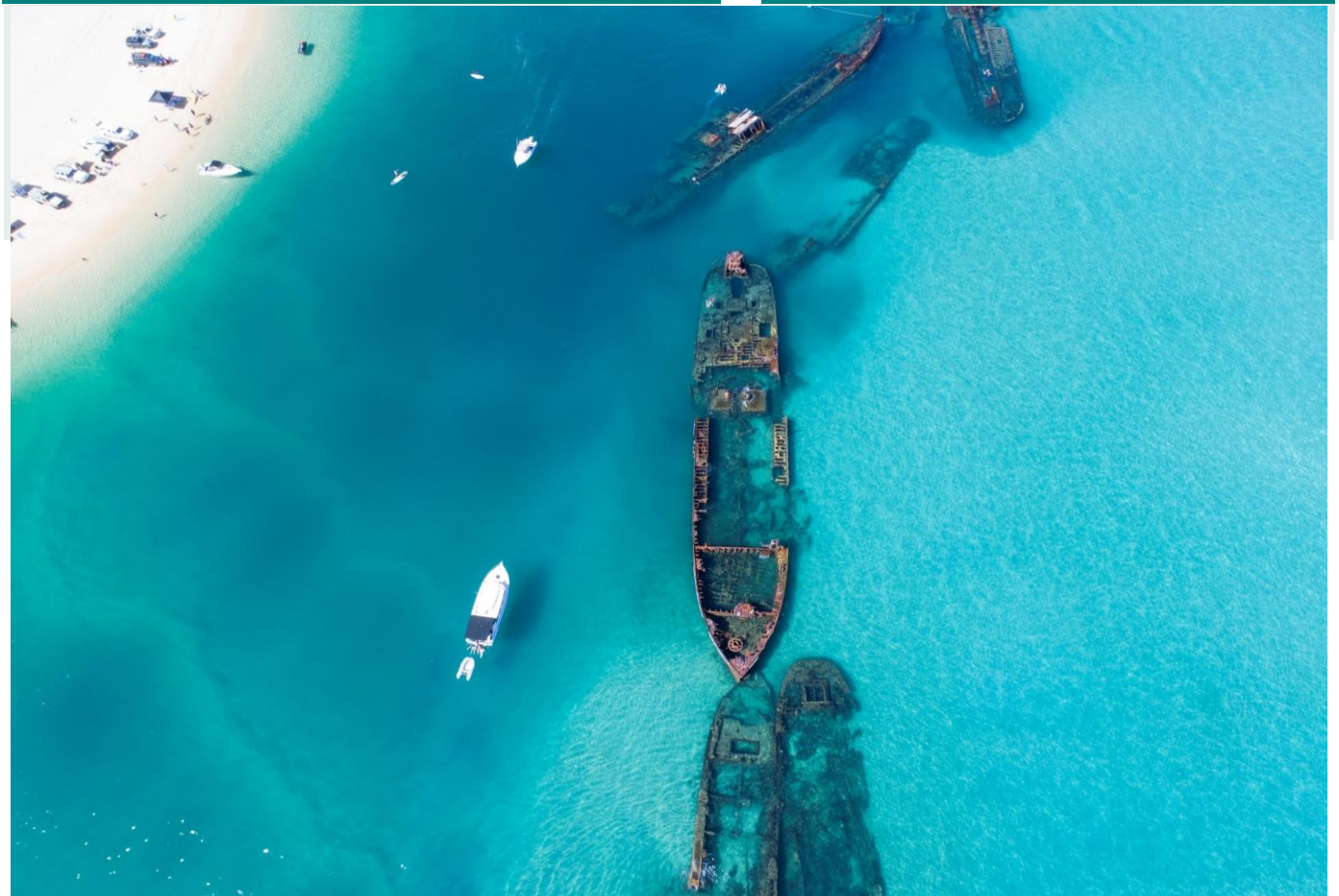
Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Brisbane	16,558,000	5.9%	\$1,836.9m	21.5%
Queensland	44,716,000	9.9%	\$5,208.8m	20.0%
Australia	206,051,000	7.4%	\$22,526.1m	10.2%

Key domestic source markets to Brisbane

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	1,441,000	18.9%	3,352,000	11.9%
Regional Qld	3,154,000	11.8%	8,009,000	6.8%
Sydney	878,000	10.5%	2,583,000	8.4%
Regional NSW	803,000	-16.3%	2,594,000	-20.3%
Melbourne	534,000	5.9%	1,880,000	5.0%
Regional Vic	207,000	34.7%	1,085,000	87.5%

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%
Australia	105,600,000	8.6%	376,087,000	7.2%
Holiday Visitors				
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%
Australia	42,364,000	7.6%	160,059,000	3.6%



Brisbane Regional Snapshot

International visitation Year Ending December 2018

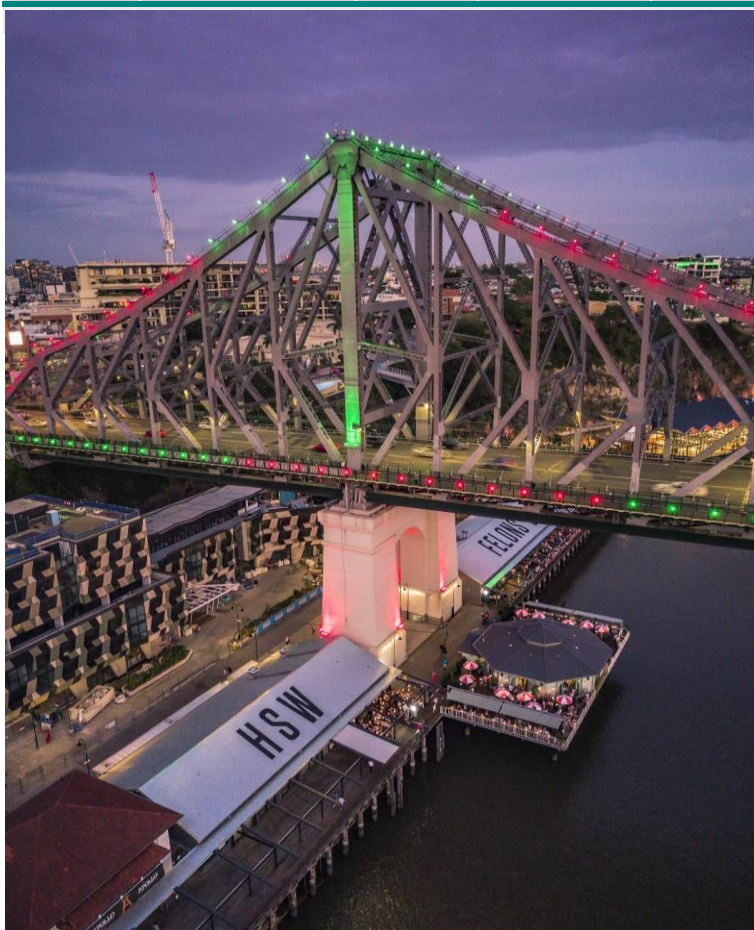
International visitors to Brisbane

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	727,000	5.4%	7,738,000	-0.2%	10.6	-0.6
VFR	427,000	7.2%	8,073,000	16.5%	18.9	1.5
Business	140,000	17.1%	864,000	12.9%	6.2	-0.2
Total³	1,400,000	6.3%	28,718,000	9.7%	20.5	0.6

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%
Australia	8,524,000	4.8%	273,793,000	3.8%

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%
Total	4,623,000	5.8%	82,392,000	1.1%



Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
China	256,000	6.9%	6,154,000	35.8%
New Zealand	222,000	6.9%	1,846,000	6.7%
United Kingdom	128,000	0.6%	2,082,000	2.1%
USA	105,000	9.0%	994,000	6.3%
Taiwan	57,000	16.1%	2,450,000	26.5%
Germany	54,000	-11.1%	639,000	-12.9%
Japan	41,000	-9.8%	1,628,000	-14.6%
Singapore	41,000	41.6%	546,000	-6.5%
Hong Kong	39,000	19.4%	934,000	-12.4%
Korea	38,000	0.0%	1,470,000	-24.9%

Top 10 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
China	180,000	1.8%	689,000	-2.2%
United Kingdom	70,000	-4.6%	629,000	-27.5%
New Zealand	61,000	3.4%	341,000	15.1%
USA	54,000	22.5%	252,000	-4.3%
Germany	45,000	-10.1%	393,000	-15.9%
Taiwan	38,000	27.4%	1,548,000	84.9%
Korea	24,000	6.2%	835,000	-26.4%
France	21,000	16.9%	483,000	31.1%
Scandinavia	20,000	6.4%	217,000	2.8%
Canada	20,000	-5.5%	135,000	-1.6%

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>

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%
TNQ	2,065,000	13.5%	10,548,000	15.7%	5.1	0.1	51%	24%	21%	9%
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%
Total Queensland	24,086,000	10.6%	94,732,000	9.5%	3.9	0.0	39%	33%	23%	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			% 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%
TNQ	863,000	-2.7%	6,288,000	-1.6%	7.3	0.1	91%	6%	3%	31%
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%
Total Queensland	2,763,000	2.3%	55,052,000	3.7%	19.9	0.3	68%	26%	8%	100%

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 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.