

Domestic Tourism Snapshot

Year ending March 2019



Domestic overnight visitors within Australia

	Visitors	Annual change ¹	Avg stay ²	Annual # change
Total Australia³	109,051,000	10.1%	3.5	0.0
Holiday	43,708,000	9.8%	3.8	-0.1
VFR ⁴	36,870,000	9.9%	3.2	0.0
Business	24,548,000	13.1%	3.3	0.1

Intrastate	75,416,000	10.0%	2.9	0.0
Holiday	32,125,000	10.7%	3.0	-0.1
VFR	26,148,000	10.5%	2.5	0.0
Business	13,249,000	10.4%	3.3	0.1

Interstate	35,632,000	10.2%	4.7	0.0
Holiday	12,501,000	7.6%	5.4	-0.1
VFR	11,028,000	7.8%	4.8	-0.1
Business	11,601,000	17.0%	3.2	0.1

Domestic overnight spend and visitation share

	Holiday share	Annual Change	Total share	Annual change
Queensland Visitation	21.8%	0.0%	22.5%	↑0.4%
New South Wales visitation	32.2%	↓0.9%	32.7%	↓0.7%
Victoria visitation	26.8%	↓0.1%	25.5%	0.4%
Western Australia visitation	9.2%	↑0.5%	9.3%	0.0%

	Holiday share	Annual Change	Total share	Annual change
Queensland OVE	26.2%	-0.1%	24.8%	0.0%
New South Wales OVE	29.1%	0.0%	29.1%	↓0.7%
Victoria OVE	20.8%	↓1.7%	20.8%	↓0.4%
Western Australia OVE	9.5%	↑1.0%	10.4%	↑0.8%

New NVS 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 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.

Records continue to tumble

Australians took a record 109.1m domestic overnight trips in the year ending March 2019, representing 10.1% growth year on year. Queensland's share of visitors increased by 0.4% to 22.5%, the strongest increase in market share across the states. The two largest markets by market share are New South Wales (down 0.7% to 32.7%) and Victoria (up 0.4% to 25.5%).

Domestic visitor expenditure also reached record levels, growing 14.2% to \$74.5bn. Queensland holds a 24.8% share of all domestic spend in Australia (unchanged over the year), compared to 29.1% for New South Wales (down 0.7%) and 20.8% for Victoria (down 0.4%). Western Australia recorded the largest gain in market share over the year up 0.8% to 10.4%.

Getting down to business

The growth in domestic visitation was spread across the main traveller segments but an increasing portion of travel and expenditure is due to business.

Business recorded the strongest growth, with the number of trips increasing by 13.1% to a record 24.5m visitors. These visitors increased their spend per night by 3.7% to \$169 per visitor and nights grew by 16.7%, resulting in expenditure growth of 21.0% to reach a record \$13.7bn. As a result the proportion of overnight business expenditure increased by 1.6% to 17.5%.

Conditions in the business sector have improved during the year to March 2019. Company profits have reached record highs, increasing 10.4% during this period. Growth was led by the mining sector (+23.5%) which was supported by high commodity prices, however, non-mining businesses also reported rising profitability (+3.6%) (Source: ABS). The lower Australian dollar continues to assist with the competitiveness of domestic industries.

Holiday visitation grew 9.8% to a record 43.7m visitors, who spent a record \$31.2bn, up 11.4% year on year. Holiday visitation accounts for 44 per cent of overnight visitor expenditure.

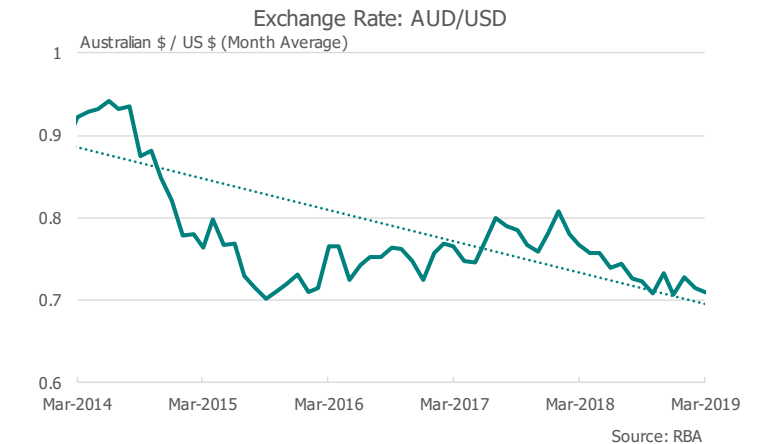
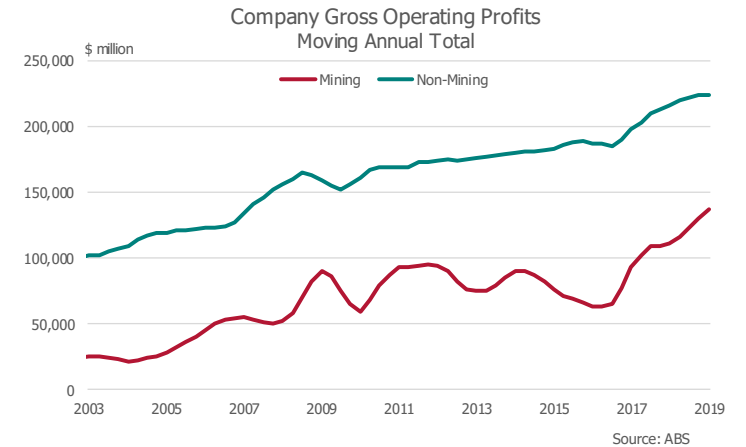
Travel to visit friends and relatives (VFR) grew 9.9% year on year to a record 36.9m visitors. These visitors spent 13.1% more over the year, driving spend to a record \$11.8bn. VFR visitation accounts for 15% of overnight visitor expenditure.

Intrastate vs. interstate

Both intrastate (up 10.0% to 75.4m) and interstate travel (up 10.2% to 35.6m) grew nationally at a similar rate. Interstate business travel was particularly strong, growing 17.0% to a record 11.6m, vs. 10.4% growth in intrastate business travel.

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual change ¹
Total Australia⁵	\$74,548.7m	14.2%
Holiday ⁶	\$31,170.3m	11.4%
VFR ⁶	\$11,769.2m	13.1%
Business ⁶	\$13,732.5m	21.0%



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Year ending March 2019

Domestic overnight visitors in Queensland

	Visitors	Annual change	Avg stay	Annual # change
Total Queensland	24,584,000	12.2%	3.9	0.0
Holiday	9,530,000	9.6%	4.4	-0.1
VFR	8,158,000	12.3%	3.3	-0.1
Business	5,825,000	17.4%	3.6	0.1
Intrastate	17,138,000	11.8%	3.2	0.0
Holiday	6,465,000	9.5%	3.2	-0.2
VFR	5,918,000	13.3%	2.6	0.0
Business	3,839,000	14.7%	3.8	0.1
Interstate	7,447,000	13.3%	5.6	0.0
Holiday	3,066,000	9.8%	7.1	0.1
VFR	2,241,000	9.6%	5.3	-0.1
Business	1,986,000	22.9%	3.3	0.1

Market maintained

Queensland maintained its 24.8% share of overnight visitor expenditure over the year. This is the 5th quarter in a row that Queensland has either maintained or grown its market share. Domestic overnight expenditure reached a record \$18.5bn, up 14.4% year-on-year. The state's growth rate was in line with the national average of 14.2%.

While maintaining market share in terms of expenditure, Queensland's share of visitation increased by 0.4% to 22.5%. Queensland welcomed 24.6m visitors to the State, up by 12.2% in the year ending March 2019. These visitors stayed in the state for a record 97.1m nights, which is 11.6% more than the previous year.

Business is booming

The business sector led the way for growth in Queensland. Queensland's share of business overnight visitor expenditure increased by 1.0% to 23.2% as business expenditure increased 26.3% to a record \$3.2bn and business visitation grew by 17.4% to 5.8m. Business travellers increased their average length of stay slightly (by 0.1 nights) and their average spend per night increased by 5.0% to \$153 per night.

Holiday visitation increased by 9.6% to a record 9.5m visitors, with expenditure growing by 11.1% to a record \$8.2bn, but Queensland's holiday market here decreased slightly (down 0.1% to 26.2%). Most of the visitors were Queenslanders holidaying in their home state, which grew 9.5% to a record 6.5m trips, while interstate holiday visitation grew by 9.8% to 3.1m.

Queensland gained market share in the VFR segment (up 0.3% to 23.2%). VFR expenditure also grew (by 14.5%) to a record \$2.7bn and visitation grew by 12.3% to a record 8.2m. Similar to holiday travel, the growth in VFR was driven by Queenslanders, up 13.3% to 5.9m trips, while interstate VFR grew 9.6% to 2.2m trips.

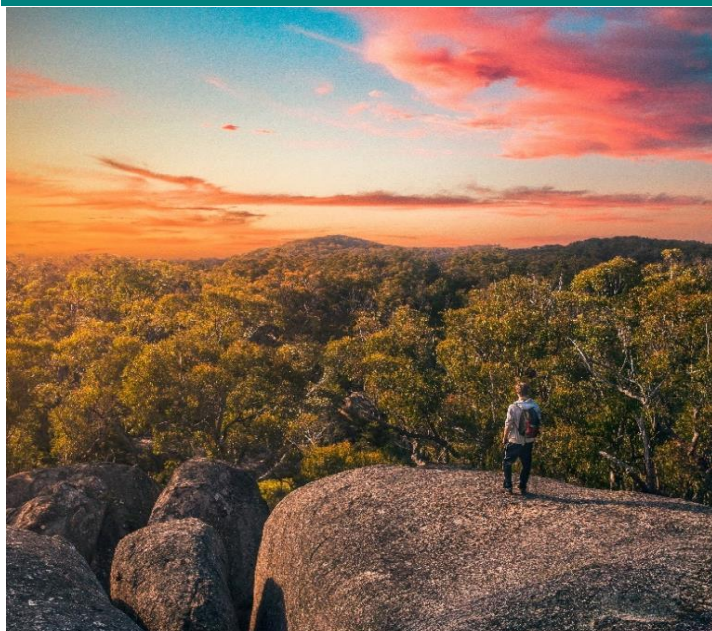
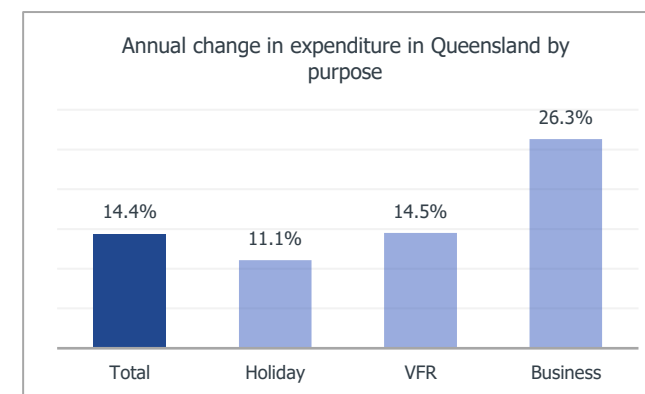
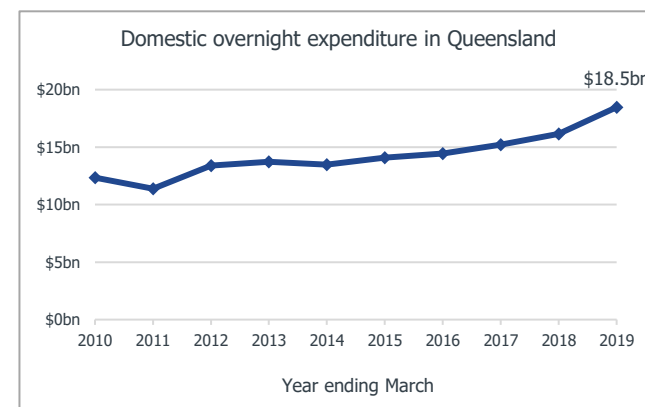
Regional highs

Six of Queensland's tourism regions reached record levels of visitor expenditure in the year ending March 2019: Brisbane (\$4.8bn), Gold Coast (\$3.6bn), Sunshine Coast (\$2.5bn), Townsville (\$895.0m) Southern Queensland Country (\$828.6m) and Mackay (\$545.0m).

Seven of Queensland's tourism regions welcomed a record number of visitors. These were Brisbane (7.6m), Gold Coast (4.0m), Sunshine Coast (3.9m), Southern Great Barrier Reef (2.2m), Southern Queensland Country (2.2m), Townsville (1.4m) and the Whitsundays (646,000).

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change
Total Queensland⁵	\$18,469.5m	14.4%
Holiday ⁶	\$8,171.6m	11.1%
VFR ⁶	\$2,735.2m	14.5%
Business ⁶	\$3,225.0m	26.3%



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Year ending March 2019



Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	24,584,000	12.2%	9,530,000	9.6%
Brisbane	7,625,000	9.9%	2,169,000	6.8%
Gold Coast	4,002,000	16.8%	2,133,000	16.5%
Sunshine Coast	3,855,000	15.0%	2,106,000	12.5%
SQC ⁷	2,192,000	8.9%	574,000	-13.1%
SGBR ⁸	2,218,000	9.3%	734,000	7.2%
Townsville	1,427,000	31.9%	478,000	36.6%
TNQ ⁹	2,019,000	5.2%	1,003,000	1.2%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	739,000	6.8%	389,000	6.1%
Mackay	1,002,000	7.0%	216,000	5.8%
Outback	965,000	7.5%	318,000	13.3%
Whitsundays	646,000	10.2%	406,000	8.3%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$18,469.5m	14.4%	100%	\$751
Brisbane	\$4,761.0m	7.5%	25.8%	\$624
Gold Coast	\$3,601.1m	22.6%	19.5%	\$900
Sunshine Coast	\$2,541.9m	22.7%	13.8%	\$659
SQC	\$828.6m	28.5%	4.5%	\$378
SGBR	\$1,160.9m	4.6%	6.3%	\$523
Townsville	\$895.0m	19.6%	4.8%	\$627
TNQ	\$2,267.8m	8.4%	12.3%	\$1,123

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$388.4m	11.7%	2.1%	\$525
Mackay	\$545.0m	22.9%	3.0%	\$544
Outback	\$624.8m	5.8%	3.4%	\$647
Whitsundays	\$696.5m	13.1%	3.8%	\$1,078

* STR Global surveys Queensland accommodation establishments with 10 or more rooms.
STR Global's North Queensland region includes Cairns, Port Douglas and Palm Cove.

Brisbane

The Brisbane region continued to see strong growth in domestic overnight visitor expenditure, reaching a record \$4.8bn up by 7.5% over the year ending March 2019. This was on the back of 9.9% growth in visitation, reaching a record 7.6m. Visitors average spend per night also grew slightly (up 3.0% to \$216). Business travel provided the strongest growth (up 14.5% to 1.9m), but holiday (up 6.8% to 2.2m) and VFR (up 7.9% to 2.9m) also grew strongly. Intrastate visitation grew 11.8% to a record 4.5m and the interstate market grew by 7.2% to 3.1m visitors.

Gold Coast

Domestic overnight expenditure in the Gold Coast region grew 22.6% to a record \$3.6bn in the year ending March 2019. The region welcomed a record 4.0m visitors up 16.8%. Business travel to the region grew strongly as visitor numbers rose 41.3% to a record 564,000 and business nights were up 23.0% to 1.6m. This increase was driven by interstate business visitors and may be related to travel during the Commonwealth Games in April 2018 and other events in the region. Holiday visitation grew by 16.5% to 2.1m and VFR travel increased by 6.5% to 1.2m. The overall average length of stay in the region increased slightly, by 0.2 nights to 3.9 nights. Overall the intrastate market grew by 21.1% to 1.9 million due largely to visitors from Brisbane (up 37.7% to 1.4 million), while interstate travel grew by 13.1% to 2.1million visitors with strong growth from regional NSW (up 25.4%) and Victoria (up 9.4%). Strong commercial accommodation performance may have helped the Gold Coast reach record levels of expenditure, with demand outstripping supply in the year ending March 2019 (Source: STR).

Tropical North Queensland (TNQ)

TNQ welcomed a record 2.0m domestic overnight visitors in the year ending March 2019, representing growth of 5.2%. These visitors spent a record \$2.3bn in the region (up 8.4%). Average length of stay increased by 0.6 nights to 5.3 nights so that visitor nights grew by 17.8% to a record 10.7m. VFR (up 21.4% to a record 506,000) and business (up 19.7% to 453,000) grew particularly strongly while holiday visitation grew 1.2% to 1.0m. Visitation growth in TNQ over the year ending March 2019 largely occurred in the June quarter and since then has been steady or negative.

Sunshine Coast

Domestic overnight expenditure in the Sunshine Coast region grew by 22.7% to a record \$2.5bn in the year ending March 2019. Overall visitor numbers grew by 15.0% year-on-year to a record 3.9m. Business travel growth was the most notable, increasing by 34.7% to a record 363,000 visitors, while the region saw 12.5% growth in holiday travel, welcoming a record 2.1m holiday visitors and VFR growth of 18.0% to a record 1.3m. Intrastate visitation makes up 76% of visitation to the region, it grew by 13.3% to a record 2.9m, while the interstate market grew by 20.4% to 944,000. As well as the increase in visitation, overnight expenditure was boosted by a 9.9% increase in spend per night to \$189 per night. Increased accommodation rates in the region may have contributed to the increased spend per night. Brisbane is the Sunshine Coast's largest source market (up 12.3% to 1.9 million) while New South Wales (up 18.0%) to 444,000 and Victoria (up 23.1% to 354,000) are the largest intrastate markets.

Whitsundays

The Whitsundays region was the most impacted when Tropical Cyclone Debbie hit in late March 2017. Two years after the event, visitation has surpassed levels seen prior to the Cyclone and reached record levels, and expenditure continues to grow strongly.

Over the three years ending March 2019, annual domestic overnight visitation grew 10.2% on average to a record 646,000 visitors, while expenditure in the region grew 13.1% to \$696.5m. While average length of stay increased, up 3.5% on average over the three years ending March 2019 to 4.8 nights, expenditure per night was steady at \$224 (down 1.2% on average over the three years). Annual holiday visitation grew 8.3% on average to 406,000 over the three-year period. Intrastate visitation grew by 13.6% on average over the three years to 372,000, while interstate visitation increased by 5.5% on average over the same period.



Intrastate visitation

	Visitors	Annual change
Total intrastate	17,138,000	11.8%
Brisbane	4,510,000	11.8%
Gold Coast	1,938,000	21.1%
Sunshine Coast	2,911,000	13.3%
SQC	1,805,000	9.6%
SGBR	1,916,000	9.5%
Townsville	1,137,000	32.2%
TNQ	1,332,000	7.3%

	Visitors	3-yr trend
Fraser Coast	589,000	9.3%
Mackay	888,000	8.2%
Outback	731,000	6.2%
Whitsundays	372,000	13.6%

Interstate visitation

	Visitors	Annual change
Total interstate	7,447,000	13.3%
Brisbane	3,115,000	7.2%
Gold Coast	2,064,000	13.1%
Sunshine Coast	944,000	20.4%
SQC	387,000	5.7%
SGBR	302,000	7.7%
Townsville	290,000	31.0%
TNQ	687,000	1.3%

	Visitors	3-yr trend
Fraser Coast	150,000	-1.3%
Mackay	114,000	-0.5%
Outback	234,000	12.2%
Whitsundays	274,000	5.5%

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Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	24,584,000	12.2%	9,530,000	9.6%
Brisbane	7,625,000	9.9%	2,169,000	6.8%
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TNQ ⁹	2,019,000	5.2%	1,003,000	1.2%

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Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
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SGBR	\$1,160.9m	4.6%	6.3%	\$523
Townsville	\$895.0m	19.6%	4.8%	\$627
TNQ	\$2,267.8m	8.4%	12.3%	\$1,123

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$388.4m	11.7%	2.1%	\$525
Mackay	\$545.0m	22.9%	3.0%	\$544
Outback	\$624.8m	5.8%	3.4%	\$647
Whitsundays	\$696.5m	13.1%	3.8%	\$1,078

Fraser Coast

The Fraser Coast region welcomed 739,000 domestic overnight visitors in the year ending March 2019. Over the three years ending March 2019, visitation grew 6.8% on average, with expenditure growing 11.7% on average over the same period to a record \$388.4m. Overnight visitor expenditure was boosted by spend per night increasing by 3.7% on average (three-year trend) to \$134 per night. The holiday market was the primary driver of growth, up by 6.1% on average over the three year period to 389,000 in the year ending March 2019. The VFR market grew by 5.0% on average over the three years to 254,000 in the year ending March 2019. Intrastate visitation accounted for 80% of visitation to the region and grew by 9.3% on average while the interstate market declined by 1.3%.

Townsville

Domestic overnight visitation to the Townsville region grew strongly in the year ending March 2019. Visitation grew 31.9% to a record 1.4m, expenditure grew 19.6% to \$895.0m and nights grew 35.6% to a record 4.9m. VFR trips recorded the strongest growth, up 33.9% to a record 415,000. Holiday and business visitation also grew strongly, by 36.6% and 30.6% respectively. Business visitation may have been assisted by relief workers travelling in the region during the Townsville floods in February 2019. The intrastate market accounts for 80% of domestic visitors to the region and grew 32.2% to a record 1.1m visitors. The interstate market also reached record levels, growing 31.0% to 290,000 visitors.

Southern Queensland Country (SQC)

The SQC region welcomed a record 2.2m domestic overnight visitors in the year ending March 2019, up 8.9% year-on-year. These visitors spent a record \$828.6m in the region (up 28.5%). VFR and business travel both reached record levels, with VFR up 18.8% to 904,000 and business up 17.5% to 549,000. Holiday visitation was down 13.1% to 574,000. The decline in holiday travel was driven by the intrastate market (down 14.6%), while interstate holiday visitation was down 7.7%. Overall, the intrastate market grew 9.6% to a record 1.8m, while the interstate market increased by 5.7%. Along with increased visitation, visitor expenditure was boosted by a 21.4% increase in visitor spend per night in the region, to \$139 per night.

Southern Great Barrier Reef (SGBR)

The SGBR region continued to see record levels of visitation, welcoming a record 2.2m visitors, up by 9.3% in the year ending March 2019. These visitors spent \$1.2bn in the region, up 4.6% year-on-year. The biggest source of growth was the business market, which grew by 23.6% to a record 711,000 visitors. Holiday travel also grew, up 7.2% to 734,000 visitors, while VFR travel declined by 3.1% to 588,000 visitors. Alongside increased visitation, the increase in expenditure reflects an increase in average length of stay, up by 0.2 nights to 3.8 nights, with total nights up 13.9% to 8.3 million.

Mackay

In the three years ending March 2019, annual domestic visitation to Mackay increased 7.0% on average to a record 1.0 million visitors. Over the same period, overnight visitor expenditure grew by 22.9% on average over the three years to reach a record \$545.0m. Visitors increased their length of stay by 6.0% on average over the three years to 4.0 nights and spend per night increased by 7.5% on average to \$136 per night, aiding the strong growth in total expenditure. Business travel grew 9.8% on average to a 519,000, with business travellers accounting for more than half (52%) of domestic visitors to the region. Meanwhile, holiday and VFR visitation grew 5.8% and 5.2% on average respectively. Visitation growth in the three years ending March 2019 was driven by the intrastate market, up by 8.2% on average to a record 888,000; while the interstate was steady (down 0.5%) on average to 114,000.

Outback

Annual domestic overnight visitor expenditure grew by 5.8% on average over the three years ending March 2019 to \$624.8m. Underlying this, visitation grew by 7.5% on average to 965,000 and average length of stay grew by 7.4% on average to 5.3 nights. As a result, overall nights grew by 16.3% on average over the period. Annual business visitation to the region grew 12.2% on average to a record 445,000 and holiday visitation to the region grew 13.3% on average over the three years ending March 2019 to 318,000. These holiday visitors spent 1.7m nights in the region (up 18.1% on average). Annual VFR visitation decreased 8.3% on average over the three years to 169,000. Visitation growth predominantly came from the interstate market, with annual visitation increasing by 12.2% on average over the three years to 234,000. Annual intrastate travel grew by 6.2% on average over the three years to 731,000.

Intrastate visitation

	Visitors	Annual change
Total intrastate	17,138,000	11.8%
Brisbane	4,510,000	11.8%
Gold Coast	1,938,000	21.1%
Sunshine Coast	2,911,000	13.3%
SQC	1,805,000	9.6%
SGBR	1,916,000	9.5%
Townsville	1,137,000	32.2%
TNQ	1,332,000	7.3%

	Visitors	3-yr trend
Fraser Coast	589,000	9.3%
Mackay	888,000	8.2%
Outback	731,000	6.2%
Whitsundays	372,000	13.6%

Interstate visitation

	Visitors	Annual change
Total interstate	7,447,000	13.3%
Brisbane	3,115,000	7.2%
Gold Coast	2,064,000	13.1%
Sunshine Coast	944,000	20.4%
SQC	387,000	5.7%
SGBR	302,000	7.7%
Townsville	290,000	31.0%
TNQ	687,000	1.3%

	Visitors	3-yr trend
Fraser Coast	150,000	-1.3%
Mackay	114,000	-0.5%
Outback	234,000	12.2%
Whitsundays	274,000	5.5%

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State expenditure comparison

	Expenditure	Annual change	Share of expenditure	Spend per visitor
Total Australia	\$74,548.7m	14.2%	100%	\$684
Queensland	\$18,469.5m	14.4%	24.8%	\$751
New South Wales	\$21,682.6m	11.4%	29.1%	\$609
Victoria	\$15,534.6m	11.9%	20.8%	\$558
Other States	\$16,171.6m	20.1%	21.7%	\$744

State visitation comparison

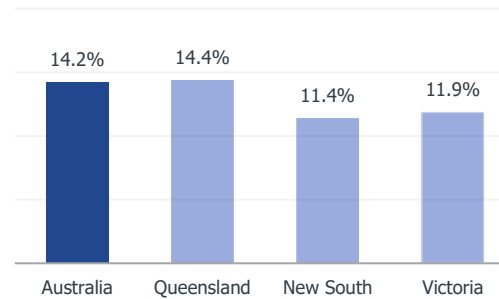
	Visitors	Annual Change	Avg stay	Annual # change
Total Australia	109,051,000	10.1%	3.5	0.0
Queensland	24,584,000	12.2%	3.9	0.0
New South Wales	35,606,000	7.9%	3.1	0.0
Victoria	27,832,000	11.8%	2.8	0.0
Other States	24,437,000	9.1%	4.0	-0.1

Total holiday	43,708,000	9.8%	3.8	-0.1
Queensland	9,530,000	9.6%	4.4	-0.1
New South Wales	14,056,000	6.9%	3.4	0.0
Victoria	11,693,000	9.2%	2.9	-0.1
Other States	9,887,000	14.2%	4.1	-0.2

Total VFR	36,870,000	9.9%	3.2	0.0
Queensland	8,158,000	12.3%	3.3	-0.1
New South Wales	12,639,000	11.4%	3.1	0.0
Victoria	9,778,000	13.6%	2.8	0.0
Other States	6,862,000	-0.9%	3.6	-0.1

Total business	24,548,000	13.1%	3.3	0.1
Queensland	5,825,000	17.4%	3.6	0.1
New South Wales	7,339,000	5.4%	2.5	0.0
Victoria	5,396,000	19.6%	2.5	0.2
Other States	6,584,000	15.0%	4.2	0.1

Annual change in visitor expenditure by state



Data Source:

The information included in this report refers to overnight visitor data extracted from the National Visitor Survey (NVS), managed by Tourism Research Australia (TRA) a federally-funded body based in Canberra. Approximately 120,000 Australian residents aged 15+ are surveyed annually using a telephone interview. The statistics included in this report depict rolling annual data and are updated each quarter. The use of rolling annual data removes seasonality from the data allowing the measurement of real growth and decline.

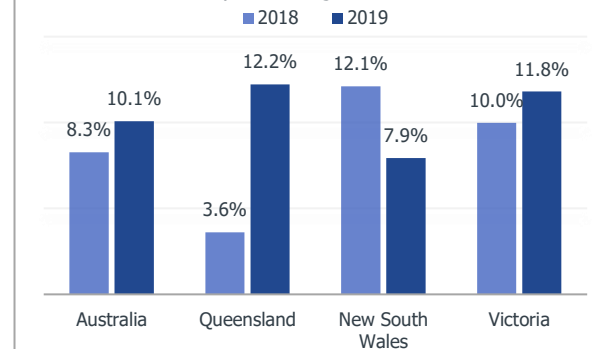
For this publication, data has been adjusted to conform to Tourism and Events Queensland's (TEQ) tourism region definitions.

In 2019, TRA has transitioned to 100% mobile phone interviewing, after previously doing 50% of the sample from landlines. 97% of the Australian population aged 15 years or more own a mobile phone. This change will improve the accuracy of national, state and territory estimates. Please visit tra.gov.au for more information on the methodology, back-casting process and impact on results.

Disclaimer:

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State visitation growth comparison, year ending March



Notes:

1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. Avg stay = Average length of stay.
3. Total includes visitors classified as 'Other' purpose. Total Australia includes visitors classified as 'Other/transit' i.e. not allocated to a state/territory.
4. VFR = Visiting friends or relatives.
5. Expenditure including airfares and long distance transport costs.
6. Expenditure excluding airfares and long distance transport costs.
7. SQC = Southern Queensland Country. Region is inclusive of the Toowoomba, South Burnett, Southern Downs and Western Downs regions.
8. SGBR = Southern Great Barrier Reef. Region is inclusive of Capricorn, Gladstone and Bundaberg.
9. TNQ = Tropical North Queensland.
10. Trend change refers to the percentage change between the three years to this year ended, compared to the three years to the prior year ending.

n/p = Not publishable

Strategic Research and Development
Tourism and Events Queensland
e. research@queensland.com
w. teq.queensland.com/research