

Domestic Tourism Snapshot

Year ending June 2019



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.

Should you wish to access the updated estimates please refer to TEQs [Tourism Data explorer](#)

	Visitors	Annual ¹ change	Avg stay ²	Annual # change
Total Australia³	113,320,000	11.7%	3.5	0.0
Holiday ⁴	45,340,000	11.1%	3.7	-0.1
VFR ⁴	38,368,000	11.8%	3.2	0.0
Business	25,591,000	14.1%	3.3	0.1

Intrastate	79,111,000	13.3%	2.9	0.0
Holiday	33,458,000	12.2%	3.0	-0.1
VFR	27,600,000	15.2%	2.5	0.0
Business	14,071,000	15.3%	3.3	0.0

Interstate	36,331,000	8.5%	4.7	0.0
Holiday	12,834,000	8.2%	5.4	-0.1
VFR	11,108,000	4.0%	4.8	0.0
Business	11,849,000	13.7%	3.3	0.1

Domestic overnight spend and visitation share

	Visitation Holiday share	Annual Change	Visitation Total share	Annual change
Queensland	21.6%	-0.1%	22.3%	0.1%
New South Wales	32.1%	-1.0%	32.9%	-0.3%
Victoria	27.2%	0.5%	25.6%	0.5%
Western Australia	9.2%	0.5%	9.4%	0.0%
	OVE Holiday share	Annual Change	OVE Total share	Annual change
Queensland	25.8%	-1.2%	24.3%	-0.8%
New South Wales	29.0%	0.2%	29.2%	-0.6%
Victoria	21.3%	-0.5%	20.9%	-0.2%
Western Australia	9.4%	0.9%	10.6%	0.9%

Australians travelling at home

Australians took a record 113.3m domestic overnight trips in the year ending June 2019, representing 11.7% growth year-on-year. All states and territories except ACT saw record number of visitors. Domestic visitor expenditure also reached record levels, growing 14.7% to \$77.5bn. All states and territories reached record levels of domestic visitor spending.

Queensland holds a 24.3% share of all domestic spend in Australia (down 0.8% over the year), compared to 29.2% for New South Wales (down by 0.6%) and 20.9% for Victoria (down 0.2%). Western Australia recorded the largest gain in market share over the year, up 0.9% to 10.6%.

Queensland share of visitors increased by 0.1% to 22.3%. Only Victoria's market share increased by 0.5% to 25.6% while New South Wales market share was 32.9% (down 0.3%).

Doing serious business

The growth in domestic visitation was spread across the main traveller segments but business travel and expenditure continues to grow faster than other purposes.

The number of business trips grew by 14.1% to a record 25.6m visitors. These visitors increased their spend per night by 4.7% to \$171 per night and nights grew by 15.9%, resulting in expenditure growth of 21.4% to reach a record \$14.6bn.

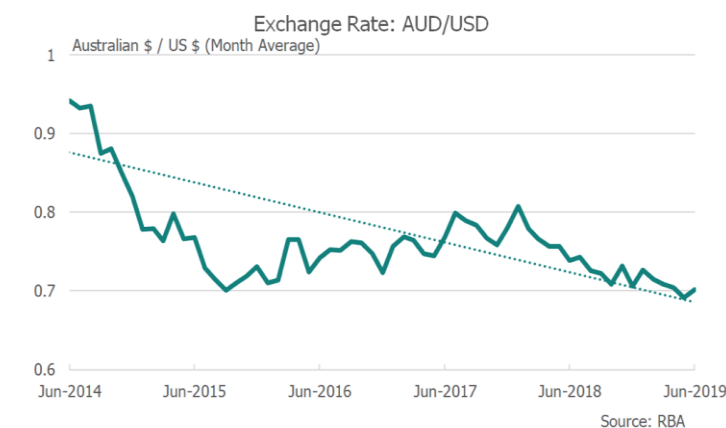
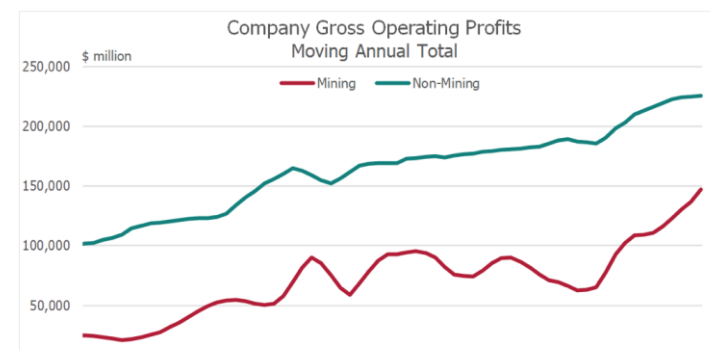
Business travel has been supported by improving conditions in the business sector which improved in the year ending June 2019. Company profits have reached record highs, increasing 10.9% during this period. Growth was led by the mining sector (+26.5%) which was supported by high commodity prices throughout the period, and non-mining businesses also reported rising profitability (+2.6%) (Source: ABS). While the lower Australian dollar continues to assist with competitiveness of domestic industries, and potential business travel.

Holiday visitation grew 11.1% to a record 45.3m visitors, who spent a record \$32.2bn, up 12.3% year-on-year. Holiday visitation accounts for 42 per cent of overnight visitor expenditure (OVE).

Travel to visit friend and relatives (VFR) grew 11.8% year-on-year to a record 38.4m visitors. These visitors overnight expenditure increased by 11.4% more over the year to a record \$12.1bn. VFR visitation accounts for 16% of OVE. In particular, intrastate business (up 15.3% to a record 14.1m) and VFR (up 15.2% to 27.6m) grew strongly.

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual change ¹
Total Australia⁵	\$77,476.0m	14.7%
Holiday ⁶	\$32,202.7m	12.3%
VFR ⁶	\$12,079.3m	11.4%
Business ⁶	\$14,645.9m	21.4%



Domestic Tourism Snapshot

Year ending June 2019

Domestic overnight visitors in Queensland

	Visitors	Annual change	Avg stay	Annual # change
Total Queensland	25,312,000	12.2%	4.0	0.0
Holiday	9,808,000	10.6%	4.4	-0.1
VFR	8,523,000	14.9%	3.4	0.0
Business	6,068,000	16.7%	3.6	-0.2
Intrastate	17,600,000	11.9%	3.2	-0.1
Holiday	6,580,000	9.1%	3.2	-0.2
VFR	6,202,000	17.3%	2.6	-0.1
Business	4,014,000	15.3%	3.9	-0.1
Interstate	7,711,000	13.0%	5.6	-0.1
Holiday	3,228,000	13.6%	6.9	-0.2
VFR	2,321,000	9.0%	5.4	0.2
Business	2,054,000	19.6%	3.1	-0.4

Queensland's visitation grows

Queensland's share of visitation was 22.3%, up by 0.1% over the year. Queensland welcomed a record 25.3m visitors to the State, up by 12.2% in the year ending June 2019. These visitors stayed in the state for a record 99.98m nights, which is 10.8% more than previous year.

Business leading the way

Out of all the travel purposes, business grew the most in Queensland. The state's share of business visitation increased by 0.5% to 23.7%, Business expenditure increased 20.5% to a record \$3.4bn and business visitation grew by 16.7% to 6.1m.

Holiday visitation increasing by 10.6% to a record 9.8m visitors and expenditure growing by 7.3% to a record \$8.3bn. Most of the visitors were Queenslanders holidaying in their home state, intrastate visitation grew 9.1% to a record 6.6m trips, while interstate holiday visitation grew by 13.6% to 3.2m.

VFR expenditure grew by 10.1% to a record \$2.7bn and visitation grew by 14.9% to a record 8.5m. The growth in VFR was driven by intrastate travel, up 17.3% to 6.2m trips, while interstate VFR grew 9.0% to a record 2.3m trips.

Regional highs

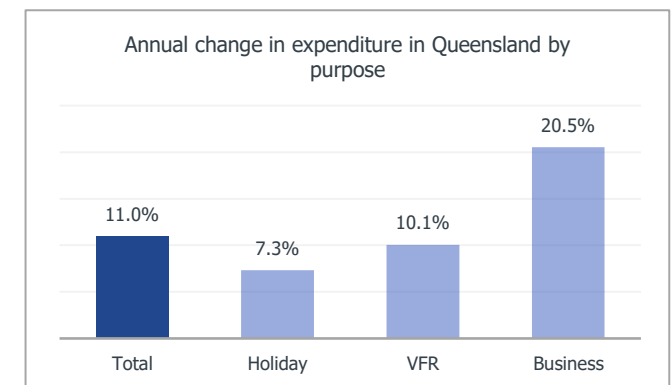
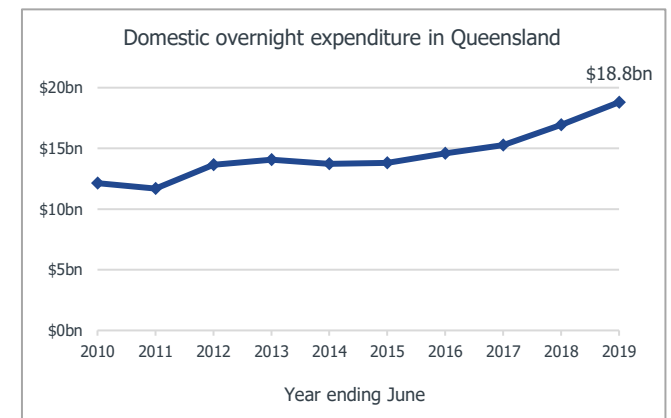
Six of Queensland's tourism regions reached record levels of visitor expenditure in the year ending June 2019: Brisbane (\$4.9bn), Gold Coast (\$3.8bn), Sunshine Coast (\$2.6bn), Southern Great Barrier Reef (\$1.2bn), Outback (\$713.2m) and Mackay (\$566.5m).

Nine of Queensland's tourism regions welcomed a record number of visitors. These were Brisbane (7.7m), Gold Coast (4.2m), Sunshine Coast (3.98m), Tropical North Queensland (2.0m), Southern Great Barrier Reef (2.3m), Townsville (1.5m), Southern Queensland Country (2.2m), Outback (1.1m) and Mackay (1.1m).



Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change
Total Queensland	\$18,802.3m	11.0%
Holiday ⁶	\$8,300.3m	7.3%
VFR ⁶	\$2,746.9m	10.1%
Business ⁶	\$3,384.6m	20.5%



Domestic Tourism Snapshot

Year ending June 2019



Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	25,312,000	12.2%	9,808,000	10.6%
Brisbane	7,741,000	8.2%	2,185,000	5.3%
Gold Coast	4,172,000	18.5%	2,265,000	21.8%
Sunshine Coast	3,982,000	17.1%	2,179,000	15.0%
SQC ⁷	2,204,000	6.2%	609,000	-4.4%
SGBR ⁸	2,342,000	12.7%	753,000	5.0%
Townsville	1,452,000	27.5%	426,000	15.7%
TNQ ⁹	2,039,000	0.1%	988,000	-7.1%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	749,000	6.0%	412,000	7.3%
Mackay	1,097,000	13.3%	221,000	9.2%
Outback	1,051,000	8.7%	318,000	4.3%
Whitsundays	643,000	8.4%	405,000	7.4%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$18,802.3m	11.0%	100%	\$743
Brisbane	\$4,896.6m	10.3%	26.0%	\$633
Gold Coast	\$3,773.6m	21.9%	20.1%	\$905
Sunshine Coast	\$2,610.8m	18.3%	13.9%	\$656
SQC	\$768.9m	-1.0%	4.1%	\$349
SGBR	\$1,205.2m	8.1%	6.4%	\$515
Townsville	\$868.4m	13.8%	4.6%	\$598
TNQ	\$2,206.1m	-5.2%	11.7%	\$1,082

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$393.0m	13.1%	2.1%	\$524
Mackay	\$566.5m	25.7%	3.0%	\$516
Outback	\$713.2m	9.9%	3.8%	\$679
Whitsundays	\$660.2m	10.6%	3.5%	\$1,026

* 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

Domestic overnight expenditure in the Brisbane region grew 10.3% to a record \$4.9bn. This largely reflected an 8.2% increase in total visitors (to 7.7 million visitors) but also reflects an increase in spend per night. VFR visitation grew particularly strongly, up 13.4% to a record 3.1 million, while holiday (up 5.3% to a record 2.2m) and business travel (up 6.7% to a record 1.9m) also grew. Interstate (up 9.1% to a record 3.2m) grew slightly faster than intrastate travel (up 7.6% to 4.5m). Interstate travel was particularly driven by business visitation (up 14.2% to 1.3m). Brisbane largest interstate markets are Sydney (up 13.3% to 948,000) and Melbourne (up 8.0% to 584,000). Intrastate travel was particularly driven by VFR (up 16.2% to 2.0m). Intraregional travel remains the largest domestic source marker (up 10.6% to 1.4m) and visitation from the Sunshine Coast also grew strongly (up 29.5% to 808,000).

Gold Coast

Gold Coast welcomed a record 4.2m visitors, up by 18.5% over the year and overnight visitor expenditure to grow by 21.9% to \$3.8bn., holiday visitation grew by 21.8% to 2.3m, while business visitation grew by 24.4% to a record 574,000 and VFR travel grew by 11.0% to 1.2m. Intrastate visitation grew by 25.2% to a record 2.0m largely due to growth in visitation from Brisbane, up 35.7% to a record 1.5m. Interstate visitation grew by 12.8% to a record 2.1m on the back of visitation from Sydney, up 13.2% to 693,000 and Melbourne, up 17.1% to 420,000. When we look at Gold Coast quarterly performance, there was a significant increase in the June quarter, for holiday visitation in particular. The Commonwealth Games in April 2018 might have triggered more domestic visitors to visit the Gold Coast post the Games to see the how the Gold Coast has changed between now and then.

Tropical North Queensland (TNQ)

Overnight visitor expenditure in TNQ decreased by 5.2% to \$2.2bn over the year to June 2019. This happened while welcoming 2.0m domestic overnight visitors, which was steady (up 0.1%) over the same period. The decrease in overnight visitor expenditure was due to spend per night as the region attracted less holiday visitors that tend to spend more than other visitor types. Holiday visitation decreased by 7.1% to 988,000, while VFR (up 21.8% to 531,000) and business (up 8.9% to 459,000) visitation increased. These results were impacted by weather events over the summer in the region. Interstate visitation decreased by 7.9% to 686,000, driven by a decrease in visitation from New South Wales (down 12.1% to 275,000). Intrastate visitation grew by 4.8% to 1.4 million.

Sunshine Coast

Domestic visitation to the Sunshine Coast grew by 17.1% to a record 3.98m, which led to OVE growing by 18.3% to a record \$2.6bn. Business travel growth was most notable, increasing by 43.9% over the year to 374,000, while VFR travel grew by 19.3% to 1.4m and holiday travel grew by 15.0% to 2.2m. Interstate travel grew by 27.2% to 999,000, largely due to interstate holiday visitation which grew by 35.2% to 601,000. Visitation from New South Wales grew by 26.2% to 462,000 and Victorian visitation grew by 30.1% to a record 374,000. Intrastate visitation grew by 14.0% to 2.98m.

Whitsundays

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

Over the three years ending June 2019, annual overnight visitor expenditure grew by 10.6% on average to \$660.2m. The growth in overnight visitor expenditure, largely reflects the 8.4% average growth in visitation over the same period to 643,000 annual visitors although it also reflects an increase in the average length of stay over this period. Annual holiday visitation grew by 7.4% on average over the past three years to 405,000. Annual intrastate visitation grew by 12.5% on average over the past three years to 377,000, while interstate visitation grew by 2.3% on average over the same period to 267,000 visitors.

Fraser Coast

Annual OVE grew by 13.1% on average over the three years ending June 2019 to \$393.0m in the year. As well as reflecting visitation growth of 6.0% on average over the past three years to 749,000 it also reflects visitors staying longer and spending more on average. Holiday visitation drove growth in the region, growing by 7.3% on average over the past three years to 412,000. The VFR market grew by 1.6% on average to 244,000. Interstate visitation grew by 6.8% on average over the past three years to 588,000, while interstate visitation grew by 3.1% on average over the same period to 161,000.

Intrastate visitation

	Visitors	Annual change
Total intrastate	17,600,000	11.9%
Brisbane	4,504,000	7.6%
Gold Coast	2,042,000	25.2%
Sunshine Coast	2,983,000	14.0%
SQC	1,805,000	7.3%
SGBR	2,050,000	14.5%
Townsville	1,166,000	28.5%
TNQ	1,352,000	4.8%

	Visitors	3-yr trend
Fraser Coast	588,000	6.8%
Mackay	982,000	14.7%
Outback	827,000	8.7%
Whitsundays	377,000	12.5%

Interstate visitation

	Visitors	Annual change
Total interstate	7,711,000	13.0%
Brisbane	3,237,000	9.1%
Gold Coast	2,130,000	12.8%
Sunshine Coast	999,000	27.2%
SQC	400,000	1.5%
SGBR	292,000	1.4%
Townsville	286,000	23.6%
TNQ	686,000	-7.9%

	Visitors	3-yr trend
Fraser Coast	161,000	3.1%
Mackay	115,000	4.1%
Outback	224,000	8.9%
Whitsundays	267,000	2.3%

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Domestic visitors by region

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	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
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Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$18,802.3m	11.0%	100%	\$743
Brisbane	\$4,896.6m	10.3%	26.0%	\$633
Gold Coast	\$3,773.6m	21.9%	20.1%	\$905
Sunshine Coast	\$2,610.8m	18.3%	13.9%	\$656
SQC	\$768.9m	-1.0%	4.1%	\$349
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Outback	\$713.2m	9.9%	3.8%	\$679
Whitsundays	\$660.2m	10.6%	3.5%	\$1,026

Townsville

Overnight visitation to Townsville grew by 27.5% over the year to 1.45m. However, since spend per visitor decreased, OVE growth was not as strong (up 13.8% to \$868.4m). The decrease in spend per visitor may be due to the relatively strong growth in VFR, compared to holiday visitation. VFR visitation grew by 44.0% to 448,000, while holiday visitation grew by 15.7% to 426,000 and business visitation grew by 21.8% to 453,000. The growth in business visitation may have been assisted relief workers travelling in the region during the Townsville flood in February 2019. Intrastate visitation accounts for more than 80% of domestic visitation, it grew by 28.5% over the year to 1.2m. Intra-regional travel is the largest intrastate market, it grew by 49.1% over the year. Interstate visitation grew by 23.6% to 286,000.

Southern Great Barrier Reef (SGBR)

OVE grew by 8.1% over the year to a record \$1.2b, this reflects a 12.7% increase in visitation to 2.3m. Business visitation (up 22.6% 760,000) and VFR visitation (up by 16.6% to 667,000) grew more strongly than holiday visitation (up by 5.0% to 753,000). Intrastate visitation grew by 14.5% over the year to 2.1 million. The two largest intrastate markets are intraregional travel which grew by 11.8% to 686,000 and Brisbane, which grew by 26.2% to a record 604,000. Interstate visitation grew by 1.4% to 292,000 visitors.

Southern Queensland Country (SQC)

The SQC region welcomed a record 2.2m domestic overnight visitors in the year ending June 2019, up 6.2% year-on-year. However, overnight visitor expenditure was steady (down 1.0%) at \$768.9m since visitors tended to have shorter stays. While business visitation grew by 11.9% to a record 556,000 and VFR grew by 14.3% to 888,000, holiday visitation decreased by 4.4% to 609,000. Intrastate visitation grew by 7.3% to 1.8m, while visitation grew by 1.5% to 400,000. The largest intrastate markets were Brisbane, up 1.9% to 846,000 and intraregional travel, up 31.1% to a record 411,000. The largest interstate market is New South Wales, up 2.1% to 272,000.

Mackay

Annual OVE in Mackay grew by 25.7% on average over the past three years to a record \$566.5m and visitation increased as well (up 13.3% on average over the past three years to 1.1m). Business travel grew 21.3% on average to a record 629,000, so that business travel now accounts for 57% of visitation to the region, reflecting improved conditions in the mining sector. Over the past three years holiday visitation grew by 9.2% on average to 221,000 and VFR visitation grew by 4.1% to 190,000. The intrastate market accounts for 89% of domestic visitation, it grew by 14.7% on average over three years 982,000 visitors. The largest interstate markets are Brisbane up (220,000) and intraregional travel (214,000). Interstate visitation grew by 4.1% on average over the past three years to 115,000.

Outback

Annual OVE grew by 9.9% on average over the three years to June 2019 to a record \$713.2m. This growth in OVE largely reflects visitation, which grew by 8.7% on average over the same period to 1.05m. Business visitation grew particularly strongly on the back of improved conditions in the mining sector, up 20% on average over the three year trend to 517,000 annual visitors. Interstate visitation grew by 8.9% on average over the past three years to 224,000 and intrastate visitation grew by 8.7% on average over the past three years to 827,000.



Intrastate visitation

	Visitors	Annual change
Total intrastate	17,600,000	11.9%
Brisbane	4,504,000	7.6%
Gold Coast	2,042,000	25.2%
Sunshine Coast	2,983,000	14.0%
SQC	1,805,000	7.3%
SGBR	2,050,000	14.5%
Townsville	1,166,000	28.5%
TNQ	1,352,000	4.8%

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Interstate visitation

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Gold Coast	2,130,000	12.8%
Sunshine Coast	999,000	27.2%
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SGBR	292,000	1.4%
Townsville	286,000	23.6%
TNQ	686,000	-7.9%

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Mackay	115,000	4.1%
Outback	224,000	8.9%
Whitsundays	267,000	2.3%

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State expenditure comparison

	Expenditure	Annual change	Share of expenditure	Spend per visitor
Total Australia	\$77,476.0m	14.7%	100%	\$684
Queensland	\$18,802.3m	11.0%	24.3%	\$743
New South Wales	\$22,601.2m	12.5%	29.2%	\$607
Victoria	\$16,208.2m	13.8%	20.9%	\$558
Other States	\$17,017.7m	22.0%	22.0%	\$754

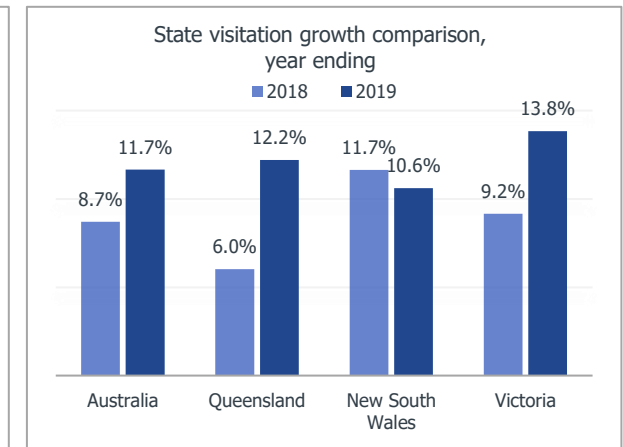
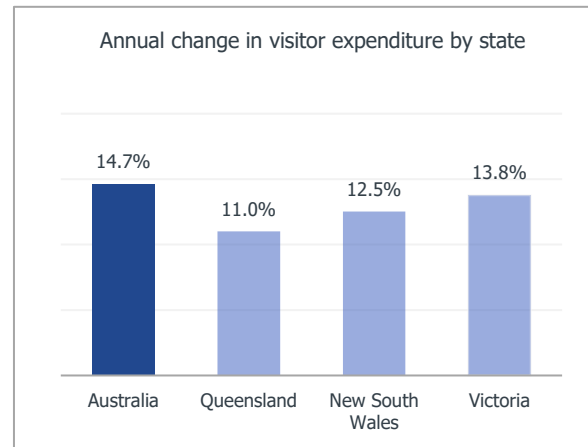
State visitation comparison

	Visitors	Annual Change	Avg stay	Annual # change
Total Australia	113,320,000	11.7%	3.5	0.0
Queensland	25,312,000	12.2%	4.0	0.0
New South Wales	37,237,000	10.6%	3.1	0.0
Victoria	29,047,000	13.8%	2.8	-0.1
Other States	25,321,000	10.9%	4.1	-0.1

Total holiday	45,340,000	11.1%	3.7	-0.1
Queensland	9,808,000	10.6%	4.4	-0.1
New South Wales	14,559,000	7.8%	3.4	0.0
Victoria	12,354,000	13.1%	2.9	-0.1
Other States	10,132,000	13.3%	4.1	-0.2

Total VFR	38,368,000	11.8%	3.2	0.0
Queensland	8,523,000	14.9%	3.4	0.0
New South Wales	13,412,000	16.5%	3.0	0.0
Victoria	10,029,000	11.7%	2.7	0.0
Other States	7,009,000	0.3%	3.6	0.0

Total business	25,591,000	14.1%	3.3	0.1
Queensland	6,068,000	16.7%	3.6	-0.2
New South Wales	7,652,000	6.7%	2.6	0.0
Victoria	5,602,000	21.6%	2.5	0.1
Other States	6,978,000	19.3%	4.3	0.1



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 owning 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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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

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