

Southern Queensland Country Regional Snapshot



Year Ending December 2018



| | Visitors | Holiday | VFR | Business | Expenditure (\$m) |
|----------------------------------|------------------|----------------|----------------|----------------|-------------------|
| Domestic Overnight | 2,205,000 | 586,000 | 899,000 | 539,000 | \$795.8m |
| Annual % change ¹ | ▲ 12.7% | ▼ -4.9% | ▲ 20.2% | ▲ 16.0% | ▲ 17.6% |
| 3-yr trend % change ² | ▲ 6.1% | ▲ 2.1% | ▲ 6.7% | ▲ 8.8% | ▲ 12.3% |
| International Overnight | 56,000 | 21,000 | 19,000 | n/p | \$57.6m |
| 3-yr trend % change | ▲ 7.7% | ▲ 9.8% | ▲ 2.1% | n/p | ▼ -0.9% |
| TOTAL | 2,261,000 | 607,000 | 918,000 | n/p | \$853.4m |
| 3-yr trend % change | ▲ 6.1% | ▲ 2.3% | ▲ 6.6% | n/p | ▲ 11.2% |



Domestic Visitors

The Southern Queensland Country (SQC) region welcomed a record 2.2m domestic overnight visitors in the year ending December 2018, up by 12.7% year on year. The domestic market accounted for the majority of SQC's overnight visitation (98%) and expenditure (93%).

Domestic visitor expenditure grew by 17.6% to a record \$795.8m. Expenditure growth outpaced visitation growth due to a 10.4% increase in spend per night to \$135/night. However, nights grew at a slower rate than visitation, increasing by 6.5% over the year to 5.9m. Average length of stay (ALoS) decreased 0.2 nights to 2.7 nights.

The increase in visitation was due to strong growth in travel for both visiting friends and relatives (VFR), (up 20.2% to a record 899,000) and business purposes (up 16.0% to a record 539,000). Holiday visitation decreased by 4.9% to 586,000, however, holiday visitors increased their ALoS (by 0.2 nights), and holiday nights increased slightly (up 1.1% to 1.7m).

The intrastate market accounts for 84% of domestic visitation to SQC and drove the region's growth. Intrastate visitation increased by 18.4% to a record 1.9m. The largest intrastate markets are Brisbane (883,000), intraregional travel (357,000) and the Sunshine Coast (211,000).

Interstate visitation decreased by 9.7% to 356,000 in the year ending December 2018. New South Wales makes up two thirds (68%) of interstate visitors to SQC.

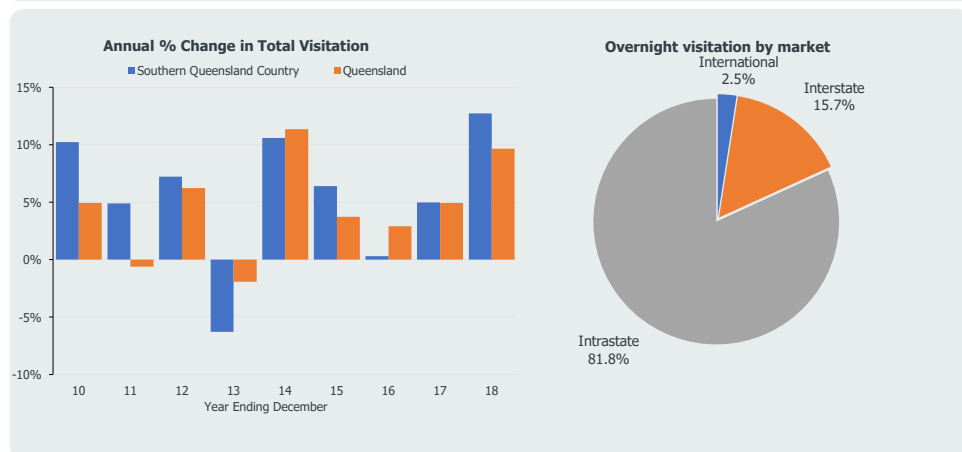
International Visitors

International visitation to SQC grew 7.7% on average in the three years ending December 2018 to a record 56,000, contributing 2% of overnight visitation and 7% of overnight expenditure in the region.

International expenditure was steady (-0.9%) over the three years ending December 2018 at \$57.6m. Visitor nights decreased by 3.0% on average over the three years ending December 2018 to 1.5m. This was due to a shorter ALoS, down 9.8% on average over the three years to 27.0 nights. Spend per night increased slightly over the same period (up 1.4% on average to \$38/night).

Holiday visitation to the region was up by 9.8% on average over the three years ending December 2018 to 21,000 and VFR visitation was up by 2.1% on average over this period to 19,000 visitors. Holiday and VFR visitation contribute 39% and 34% of international visitation to SQC respectively.

European markets (including the UK) contributed 19,000 visitors to the region, up by 3.7% on average over the three years ending December 2018. Asian visitation to the region grew by 13.4% on average over the period to 17,000.



Research Updates

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

Southern Queensland Country Regional Snapshot

Domestic visitation Year Ending December 2018

Domestic visitors to Southern Queensland Country

| | Visitors | Annual % Chg | Nights | Annual % Chg | Length of Stay | Year # Chg |
|-----------------------------|------------------|--------------|------------------|--------------|----------------|-------------|
| Holiday | 586,000 | -4.9% | 1,653,000 | 1.1% | 2.8 | 0.2 |
| VFR | 899,000 | 20.2% | 2,206,000 | 26.1% | 2.5 | 0.1 |
| Business | 539,000 | 16.0% | 1,583,000 | -12.9% | 2.9 | -1.0 |
| Domestic³ | 2,205,000 | 12.7% | 5,893,000 | 6.5% | 2.7 | -0.2 |
| Intrastate | | | | | | |
| Holiday | 473,000 | 2.6% | 1,275,000 | 15.6% | 2.7 | 0.3 |
| VFR | 759,000 | 19.9% | 1,664,000 | 20.0% | 2.2 | 0.0 |
| Business | 487,000 | 27.2% | 1,497,000 | -11.0% | 3.1 | -1.3 |
| Intrastate | 1,850,000 | 18.4% | 4,790,000 | 8.8% | 2.6 | -0.2 |
| Interstate | | | | | | |
| Holiday | 113,000 | -27.1% | 378,000 | -28.8% | 3.3 | -0.1 |
| VFR | 140,000 | 21.5% | 543,000 | 49.7% | 3.9 | 0.7 |
| Business | n/p | n/p | n/p | n/p | n/p | n/p |
| Interstate | 356,000 | -9.7% | 1,103,000 | -2.4% | 3.1 | 0.2 |

Domestic day trip visitors

| Total Visitors | Day trip visitors | Year % Chg | Expenditure (\$) million | Year % Chg |
|------------------|--------------------|-------------|--------------------------|--------------|
| Southern Queens | 4,220,000 | 27.2% | \$631.2m | 28.0% |
| 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 Southern Queensland Country

| All Visitors | Visitors | Annual % Chg | Nights | Annual % Chg |
|--------------|----------|--------------|-----------|--------------|
| Brisbane | 883,000 | 13.5% | 2,349,000 | 29.3% |
| Regional Qld | 966,000 | 23.2% | 2,441,000 | -5.6% |
| Sydney | n/p | n/p | n/p | n/p |
| Regional NSW | 176,000 | -13.7% | 400,000 | -33.8% |
| Melbourne | n/p | n/p | n/p | n/p |
| 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% |
| Australia | 105,600,000 | 8.6% | 376,087,000 | 7.2% |
| 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% |
| Australia | 42,364,000 | 7.6% | 160,059,000 | 3.6% |



Southern Queensland Country Regional Snapshot

International visitation Year Ending December 2018

International visitors to Southern Queensland Country

| All Visitors | Visitors | Trend % Chg | Nights | Trend % Chg | Length of Stay | Year # Chg |
|--------------------------|---------------|-------------|------------------|--------------|----------------|-------------|
| Holiday | 21,000 | 9.8% | 593,000 | -14.8% | 27.7 | 5.4 |
| VFR | 19,000 | 2.1% | 337,000 | 5.1% | 18.1 | -2.1 |
| Business | n/p | n/p | n/p | n/p | n/p | n/p |
| Total³ | 56,000 | 7.7% | 1,501,000 | -3.0% | 27.0 | -0.2 |

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 | Trend % Chg | Nights | Trend % Chg |
|----------------|----------|-------------|--------|-------------|
| New Zealand | n/p | n/p | n/p | n/p |
| United Kingdom | n/p | n/p | n/p | n/p |
| USA | n/p | n/p | n/p | n/p |
| Japan | n/p | n/p | n/p | n/p |
| Switzerland | n/p | n/p | n/p | n/p |
| China | n/p | n/p | n/p | n/p |
| Germany | n/p | n/p | n/p | n/p |
| Canada | n/p | n/p | n/p | n/p |
| Taiwan | n/p | n/p | n/p | n/p |
| France | n/p | n/p | n/p | n/p |

For technical reasons, some data may not be publishable (n/p), however the markets will still appear in order.

Top 10 holiday source markets

| Holiday | Visitors | Trend % Chg | Nights | Trend % Chg |
|----------------|----------|-------------|--------|-------------|
| United Kingdom | n/p | n/p | n/p | n/p |
| Switzerland | n/p | n/p | n/p | n/p |
| USA | n/p | n/p | n/p | n/p |
| New Zealand | n/p | n/p | n/p | n/p |
| Germany | n/p | n/p | n/p | n/p |
| France | n/p | n/p | n/p | n/p |
| Taiwan | n/p | n/p | n/p | n/p |
| India | n/p | n/p | n/p | n/p |
| Japan | n/p | n/p | n/p | n/p |
| Canada | n/p | n/p | n/p | n/p |

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 | 6.7% | 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.