# Are we there yet?

## The current and future value of tourism to **Queensland**

Discovery series

**Images coutesy of: Front cover:** Delaware North Companies **Page 2:** Tourism Port Douglas and Daintree/Darren Jew

# About the NRMA

Better road and transport infrastructure has been a core focus of the NRMA since 1920 when our founders lobbied for improvements to the condition of Parramatta Road in Sydney. Independent advocacy was the foundation activity of the organisation and remains critical to who we are as we approach our first centenary.

From humble beginnings, the NRMA has grown to one of the largest tourism and travel companies in Australia, representing over 2.6 million Australians. As our business has grown and diversified, so too has our national footprint and customer base, providing motoring, mobility and tourism services to 4.9 million customers across the country.

Today, the NRMA works with policy makers and industry leaders to advocate for increased investment in transport solutions to make mobility safer and easier, provide access to affordable travel options and experiences, and ensure communities remain connected to business and employment opportunities.
The NRMA is passionate about facilitating tourism and travel across Australia, recognising the vital role travel plays in how Australians connect and recharge, and discover the country.

By working together with all levels of government to deliver integrated tourism and travel options we can give the community a real choice about how they get around and explore the country. The NRMA believes that integrated transport networks, high-quality public transport and improved visitor facilities are essential to solve the challenge of growing congestion and provide for the future growth of our communities.

## Discovery series

The NRMA is passionate about travel. We aim to inspire people to connect, explore and discover this great country through quality tourism and transport services.

As the backbone of many regional communities and an employer of over half a million Australians, we need to ensure the tourism industry continues to grow. The NRMA will champion investment in transport and visitor infrastructure, partnerships to profile our regions and technology to link visitors with the most iconic and best kept secrets this country has to offer.

# Introduction

Queensland is synonymous with Australian tourism. The state is home to many of the natural icons that attract visitors the world over to our shores including the Great Barrier Reef, the Whitsundays and the Daintree rainforest.

Yet QLD's tourism industry is diverse, offering a multitude of experiences to domestic and international visitors that extend well beyond the reef.

The NRMA is committed to the QLD tourism industry and the communities it supports. The NRMA's QLD *Are We There Yet?* paper highlights the importance of tourism to Queensland and its regions, trends in visitation and expenditure, and the value of drive tourism and caravan and camping to many of the state's iconic regional destinations.

QLD welcomed 63.9 million visitors to the state in 2016-17. These visitors spent $25 billion in local communities. Seventy per cent of visitor expenditure occurs in regional QLD, with 79 per cent of total visitor expenditure generated by domestic visitors.

The industry employed 137,500 people in 2016-17. Tourism's proportion of employment can reach as high as 20 per cent in many regional communities.

The Whitsundays, Tropical North Queensland and the Gold Coast have experienced the largest average annual increases in international visitation since 2011-12. The Whitsundays however has seen the largest average annual increase in international expenditure at 20 per cent to $196 million in 2016-17.

Most regions experienced modest growth in domestic overnight visitation, yet Mackay was the only region that experienced the same rate of growth in domestic visitor nights as Brisbane, growing 5 per cent to 3.4 million.

Encouraging visitors to discover our regions and stay longer is a core focus of the NRMA. The organisation recognises the importance of drive tourism in facilitating visitation to the regions.

In 2016-17, 54 million visitors took a self-drive trip in QLD, with 98 per cent of self-drive trips being undertaken by domestic visitors. Further, caravan and camping generated $849 million in 2016-17 with 93 per cent of caravan and camping expenditure occurring in regional QLD.

Townsville has seen the largest annual growth in self-drive trips with a 7 per cent increase year-on-year to 2.5 million in 2016-17. However the Sunshine Coast and the Gold Coast combined represent 48 per cent of self-drive expenditure outside Brisbane.

The State should be commended on the inclusion of regional growth targets in each of its Destination Management Plans. The NRMA believes these targets rightly place the emphasis on growing tourism in the regions that rely on it the most for economic and social development. A similar process should be adopted in the other states and at a national level to guide the sectors performance in the regions to 2020 and beyond.

With the right level of investment, planning and industry partnerships, the NRMA forecasts that visitor nights could grow to 201 million by 2026-27, generating $28.8 billion in overnight visitor expenditure in the state economy. Of this spend, $20 billion could be generated in regional QLD. With the industry approaching the cusp of the 2020 Tourism Industry potential target, now is the time to review the sectors performance and plan for the future.

# QLD tourism regions


Central Queensland* and Outback Queensland^
Based on AS GS 2016 edition of ABS Tourism Regions, Queensland. Revised 2018 Tourism regions saw formation of 'Capricorn' region and shaded area added to 'Outback Queensland'. For the purpose of analysis, data for Central Queensland and Outback Queensland is based on 2016 ABS Tourism region definition.

# Tourism summary

## Headline figures

**137,500**
**people employed in the sector**

44.2 million visitors to
**regional QLD —**
69 per cent of total visitation

**$25 billion**
**in visitor expenditure**

Domestic overnight expenditure totalled
**$15.2 billion**
representing 61 per cent of total spend

**70 per cent of expenditure occurs in regional QLD**
**$17.3 billion**

International visitor expenditure totalled
**$5.2** billion in 2016-17, an average annual growth rate of 7 per cent

**63.9 million**
**visitors — 96 per cent are domestic**

## Industry potential

**Visitor nights could grow to**
**201**
**million by 2026-27 — 96 million in regional QLD**

**$20 billion** in overnight visitor expenditure could be spent directly in regional QLD

**Direct overnight**
**visitor expenditure**
**could increase to $29 billion in 2026-27**

Self-drive visitor nights could increase to
**123**
million by 2026-27

## Caravan and camping

Visitors who stayed in a caravan or camping ground spent
**$849 million in 2016-17**

**93%** **of caravan and camping expenditure occurs in regional QLD**

## Self-drive

**54 million**

**visitors took a self-drive trip in 2016-17**

**98%**

of self-drive trips were by domestic visitors

**Self-drive trips by**

**international visitors**

**grew twice as fast as domestic overnight trips - 8 per cent compared to 4 per cent**

Self-drive tourism expenditure totalled

**$12.9 billion**

in 2016-17

**74%**

**of self-drive tourism expenditure occurs in regional QLD**

The Sunshine Coast and the Gold Coast combine represent 48 per cent of self-drive expenditure at

**$4.6 billion**

**Townsville has seen the largest average annual growth in self-drive trips at**

**7%**

**The Whitsundays**

**saw the largest year-on-year increase in self-drive international visitation at 81,000 visitors who spent $49 million**

## In the regions

**Whitsundays had the highest average annual growth rate of international visitors at**

**10%**

Townsville experienced the largest average annual growth in domestic daytrips at 10 per cent, increasing to

**1.8 million**

**The Whitsundays**

**also saw the largest average increase in international expenditure at 20 per cent per annum to $196 million**

Mackay saw the largest average annual increase in

**domestic visitor nights**

of 5 per cent to 3.4 million

**Bundaberg has seen an average annual increase in international visitor nights of 6 per cent to**

**1.2 million in 2016-17**

# Economic contribution of tourism

| | | Total tourism visitation | | | | Total tourism nights | | |
|---|---|---|---|---|---|---|---|---|
| | | Visitors (000) | | | | Nights (000) | | |
| **Stopover region** | **Financial year** | **Int'l** | **Dom. overnight** | **Dom. daytrips** | **Total** | **Int'l** | **Dom. overnight** | **Total** |
| Brisbane | 2011/12 | 900 | 5,035 | 12,660 | 18,595 | 18,838 | 15,275 | 34,113 |
| | 2016/17 | 1,215 | 6,416 | 13,355 | 20,986 | 26,160 | 18,977 | 45,137 |
| | Av. Annual change | 7% | 5% | 1% | 3% | 8% | 5% | 6% |
| Bundaberg | 2011/12 | 38 | 567 | 1,017 | 1,622 | 925 | 1,726 | 2,651 |
| | 2016/17 | 42 | 556 | 669 | 1,267 | 1,212 | 1,990 | 3,203 |
| | Av. Annual change | 2% | 0% | -7% | -4% | 6% | 3% | 4% |
| Central Queensland* | 2011/12 | 110 | 1,294 | 1,929 | 3,333 | 1,213 | 5,253 | 6,467 |
| | 2016/17 | 120 | 1,481 | 1,970 | 3,570 | 1,251 | 5,436 | 6,687 |
| | Av. Annual change | 2% | 3% | 0% | 1% | 1% | 1% | 1% |
| Southern Queensland Country | 2011/12 | 45 | 1,699 | 3,082 | 4,826 | 1,192 | 5,186 | 6,379 |
| | 2016/17 | 46 | 1,876 | 3,402 | 5,324 | 1,337 | 5,531 | 6,868 |
| | Av. Annual change | 0% | 2% | 2% | 2% | 2% | 1% | 2% |
| Fraser Coast | 2011/12 | 123 | 684 | 999 | 1,806 | 519 | 2,568 | 3,087 |
| | 2016/17 | 148 | 571 | 816 | 1,536 | 652 | 2,427 | 3,079 |
| | Av. Annual change | 4% | -3% | -4% | -3% | 5% | -1% | 0% |
| Gold Coast | 2011/12 | 735 | 3,363 | 7,041 | 11,138 | 7,898 | 13,789 | 21,687 |
| | 2016/17 | 1,056 | 3,953 | 7,898 | 12,907 | 9,979 | 14,635 | 24,614 |
| | Av. Annual change | 9% | 4% | 2% | 3% | 5% | 1% | 3% |
| Mackay | 2011/12 | 43 | 741 | 1,018 | 1,802 | 607 | 2,734 | 3,342 |
| | 2016/17 | 45 | 883 | 695 | 1,623 | 431 | 3,391 | 3,822 |
| | Av. Annual change | 1% | 4% | -6% | -2% | -6% | 5% | 3% |
| Townsville | 2011/12 | 109 | 1,013 | 1,253 | 2,376 | 1,119 | 4,456 | 5,575 |
| | 2016/17 | 132 | 1,096 | 1,848 | 3,076 | 1,256 | 3,716 | 4,972 |
| | Av. Annual change | 4% | 2% | 10% | 6% | 2% | -3% | -2% |
| Outback^ | 2011/12 | 25 | 626 | 442* | 1,093 | 498 | 2,770 | 3,268 |
| | 2016/17 | 26 | 792 | 537 | 1,356 | 471 | 3,058 | 3,529 |
| | Av. Annual change | 1% | 5% | 4% | 5% | -1% | 2% | 2% |
| Sunshine Coast | 2011/12 | 240 | 2,857 | 5,192 | 8,289 | 2,593 | 10,648 | 13,242 |
| | 2016/17 | 296 | 3,424 | 6,083 | 9,803 | 3,039 | 12,359 | 15,398 |
| | Av. Annual change | 5% | 4% | 3% | 4% | 3% | 3% | 3% |
| Tropical North Queensland | 2011/12 | 614 | 1,576 | 2,420 | 4,610 | 5,612 | 8,060 | 13,671 |
| | 2016/17 | 898 | 1,805 | 2,328 | 5,032 | 6,751 | 8,822 | 15,573 |
| | Av. Annual change | 9% | 3% | -1% | 2% | 4% | 2% | 3% |
| Whitsundays | 2011/12 | 163 | 566 | 240* | 970 | 1,104 | 2,501 | 3,605 |
| | 2016/17 | 241 | 518 | 317* | 1,077 | 1,371 | 2,411 | 3,783 |
| | Av. Annual change | 10% | -2% | 6% | 2% | 5% | -1% | 1% |
| Regional Queensland | 2011/12 | 1,461 | 13,597 | 24,633 | 39,691 | 23,280 | 59,691 | 82,971 |
| | 2016/17 | 1,971 | 15,636 | 26,564 | 44,171 | 27,750 | 63,776 | 91,526 |
| | Av. Annual change | 7% | 3% | 2% | 2% | 4% | 1% | 2% |
| **Queensland** | **2011/12** | **1,935** | **17,951** | **37,293** | **57,179** | **42,118** | **74,966** | **117,084** |
| | **2016/17** | **2,618** | **21,342** | **39,918** | **63,878** | **53,910** | **82,753** | **136,663** |
| | **Av. Annual change** | **7%** | **4%** | **1%** | **2%** | **6%** | **2%** | **3%** |

Source: Tourism Research Australia

| Total tourism expenditure | | | | | | |
|---|---|---|---|---|---|---|
| | | Regional expenditure ($M) | | | | Employment |
| Stopover region | Financial year | Int'l | Dom. overnight | Dom. daytrips | Total | Total |
| Brisbane | 2011/12 | 1,511 | 3,080 | 1,326 | 5,916 | 39,500 |
| | 2016/17 | 2,164 | 3,854 | 1,362 | 7,380 | |
| | Av. Annual change | 9% | 5% | 1% | 5% | |
| Bundaberg | 2011/12 | 31 | 205 | 139 | 376 | 2,300 |
| | 2016/17 | 53 | 246 | 113 | 412 | |
| | Av. Annual change | 14% | 4% | -4% | 2% | |
| Central Queensland* | 2011/12 | 80 | 703 | 267 | 1,049 | 6,600 |
| | 2016/17 | 46 | 845 | 232 | 1,122 | |
| | Av. Annual change | -9% | 4% | -3% | 1% | |
| Southern Queensland Country | 2011/12 | 56 | 609 | 419 | 1,084 | 6,500 |
| | 2016/17 | 57 | 713 | 428 | 1,198 | |
| | Av. Annual change | 0% | 3% | 0% | 2% | |
| Fraser Coast | 2011/12 | 36 | 382 | 66 | 483 | 3,300 |
| | 2016/17 | 36 | 318 | 134 | 488 | |
| | Av. Annual change | 0% | -3% | 21% | 0% | |
| Gold Coast | 2011/12 | 859 | 3,031 | 749 | 4,639 | 28,800 |
| | 2016/17 | 1,210 | 3,092 | 754 | 5,056 | |
| | Av. Annual change | 8% | 0% | 0% | 2% | |
| Mackay | 2011/12 | 37 | 373 | 145 | 555 | 2,600 |
| | 2016/17 | 21 | 380 | 71 | 473 | |
| | Av. Annual change | -9% | 0% | -10% | -3% | |
| Townsville | 2011/12 | 86 | 652 | 132 | 869 | 5,800 |
| | 2016/17 | 106 | 756 | 204 | 1,065 | |
| | Av. Annual change | 5% | 3% | 11% | 5% | |
| Outback^ | 2011/12 | 22 | 463 | np* | 543 | 2,800 |
| | 2016/17 | 12 | 502 | 112 | 626 | |
| | Av. Annual change | -9% | 2% | np | 3% | |
| Sunshine Coast | 2011/12 | 206 | 1,707 | 518 | 2,431 | 16,100 |
| | 2016/17 | 250 | 2,065 | 543 | 2,857 | |
| | Av. Annual change | 4% | 4% | 1% | 4% | |
| Tropical North Queensland | 2011/12 | 791 | 1,786 | 220 | 2,797 | 18,600 |
| | 2016/17 | 1,081 | 1,870 | 258 | 3,209 | |
| | Av. Annual change | 7% | 1% | 3% | 3% | |
| Whitsundays | 2011/12 | 97 | 605 | np* | 724 | 4,500 |
| | 2016/17 | 196 | 526 | np* | 759 | |
| | Av. Annual change | 20% | -3% | np | 1% | |
| Regional Queensland | 2011/12 | 2,301 | 10,516 | 2,734 | 15,550 | 98,100 |
| | 2016/17 | 3,068 | 11,313 | 2,887 | 17,265 | |
| | Av. Annual change | 7% | 2% | 1% | 2% | |
| **Queensland** | **2011/12** | **3,812** | **13,596** | **4,060** | **21,466** | **137,500** |
| | **2016/17** | **5,232** | **15,167** | **4,249** | **24,645** | |
| | **Av. Annual change** | **7%** | **2%** | **1%** | **3%** | |

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

# Self-drive tourism

| | | Drive tourism | | | | Drive tourism nights | | |
|---|---|---|---|---|---|---|---|---|
| | | Visitors (000) | | | | Nights (000) | | |
| **Stopover region** | **Financial year** | **Int'l** | **Dom. overnight** | **Dom. daytrips** | **Total** | **Int'l** | **Dom. overnight** | **Total** |
| Brisbane | 2011/12 | 365 | 2,847 | 10,879 | 14,091 | 8,554 | 7,715 | 16,270 |
| | 2016/17 | 532 | 3,821 | 11,923 | 16,276 | 13,587 | 10,338 | 23,925 |
| | Av. Annual change | 9% | 7% | 2% | 3% | 12% | 7% | 9% |
| Bundaberg | 2011/12 | 24 | 517 | 1,008 | 1,549 | 257 | 1,552 | 1,808 |
| | 2016/17 | 28 | 513 | 654 | 1,194 | 599 | 1,864 | 2,463 |
| | Av. Annual change | 3% | 0% | -7% | -5% | 27% | 4% | 7% |
| Central Queensland* | 2011/12 | 55 | 1,066 | 1,792 | 2,914 | 315 | 3,657 | 3,972 |
| | 2016/17 | 70 | 1,197 | 1,885 | 3,151 | 315 | 4,081 | 4,396 |
| | Av. Annual change | 5% | 2% | 1% | 2% | 0% | 2% | 2% |
| Southern Queensland Country | 2011/12 | 31 | 1,538 | 2,950 | 4,518 | 511 | 4,578 | 5,089 |
| | 2016/17 | 31 | 1,705 | 3,375 | 5,111 | 739 | 4,182 | 4,921 |
| | Av. Annual change | 0% | 2% | 3% | 3% | 9% | -2% | -1% |
| Fraser Coast | 2011/12 | 54 | 593 | 965 | 1,612 | 207 | 2,014 | 2,221 |
| | 2016/17 | 73 | 475 | 816 | 1,365 | 287 | 2,107 | 2,395 |
| | Av. Annual change | 7% | -4% | -3% | -3% | 8% | 1% | 2% |
| Gold Coast | 2011/12 | 254 | 2,135 | 6,759 | 9,148 | 3,386 | 7,249 | 10,635 |
| | 2016/17 | 364 | 2,651 | 7,611 | 10,626 | 4,634 | 8,121 | 12,756 |
| | Av. Annual change | 9% | 5% | 3% | 3% | 7% | 2% | 4% |
| Mackay | 2011/12 | 24 | 452 | 1,006 | 1,483 | 106 | 1,615 | 1,721 |
| | 2016/17 | 30 | 614 | 671 | 1,315 | 141 | 2,323 | 2,464 |
| | Av. Annual change | 5% | 7% | -7% | -2% | 6% | 9% | 9% |
| Townsville | 2011/12 | 53 | 625 | 1,187 | 1,865 | 255 | 2,154 | 2,409 |
| | 2016/17 | 65 | 707 | 1,726 | 2,498 | 291 | 2,165 | 2,456 |
| | Av. Annual change | 5% | 3% | 9% | 7% | 3% | 0% | 0% |
| Outback^ | 2011/12 | 17 | 439 | 431* | 887 | 124 | 1,770 | 1,894 |
| | 2016/17 | 19 | 621 | 507 | 1,147 | 167 | 2,081 | 2,247 |
| | Av. Annual change | 3% | 8% | 4% | 6% | 7% | 4% | 4% |
| Sunshine Coast | 2011/12 | 144 | 2,389 | 5,051 | 7,585 | 1,140 | 7,866 | 9,006 |
| | 2016/17 | 187 | 2,839 | 6,014 | 9,040 | 1,765 | 8,608 | 10,373 |
| | Av. Annual change | 6% | 4% | 4% | 4% | 11% | 2% | 3% |
| Tropical North Queensland | 2011/12 | 111 | 798 | 2,298 | 3,207 | 1,336 | 2,800 | 4,136 |
| | 2016/17 | 144 | 1,013 | 2,264 | 3,421 | 1,802 | 3,805 | 5,607 |
| | Av. Annual change | 6% | 5% | 0% | 1% | 7% | 7% | 7% |
| Whitsundays | 2011/12 | 55 | 334 | 233* | 622 | 271 | 1,127 | 1,398 |
| | 2016/17 | 81 | 282 | 296* | 659 | 369 | 1,174 | 1,543 |
| | Av. Annual change | 10% | -3% | 5% | 1% | 7% | 1% | 2% |
| Regional Queensland | 2011/12 | 488 | 9,911 | 23,682 | 34,081 | 7,908 | 36,382 | 44,290 |
| | 2016/17 | 647 | 11,538 | 25,819 | 38,004 | 11,109 | 40,511 | 51,620 |
| | Av. Annual change | 7% | 3% | 2% | 2% | 8% | 2% | 3% |
| **Queensland** | **2011/12** | **715** | **12,391** | **34,561** | **47,667** | **16,462** | **44,097** | **60,559** |
| | **2016/17** | **1,006** | **14,921** | **37,741** | **53,668** | **24,696** | **50,849** | **75,545** |
| | **Av. Annual change** | **8%** | **4%** | **2%** | **3%** | **10%** | **3%** | **5%** |

Source: Tourism Research Australia

| Drive tourism expenditure | | | | | |
|---|---|---|---|---|---|
| | | Regional expenditure ($m) | | | |
| **Stopover region** | **Financial year** | **Int'l** | **Dom. overnight** | **Dom. daytrips** | **Total** |
| Brisbane | 2011/12 | 591 | 1,054 | 1,092 | 2,737 |
| | 2016/17 | 928 | 1,291 | 1,149 | 3,367 |
| | Av. Annual change | 11% | 4% | 1% | 5% |
| Bundaberg | 2011/12 | 8 | 148 | 138 | 294 |
| | 2016/17 | 23 | 201 | 112 | 336 |
| | Av. Annual change | 38% | 7% | -4% | 3% |
| Central Queensland* | 2011/12 | 22 | 498 | 227 | 747 |
| | 2016/17 | 13 | 537 | 219 | 769 |
| | Av. Annual change | -8% | 2% | -1% | 1% |
| Southern Queensland Country | 2011/12 | 29 | 435 | 408 | 872 |
| | 2016/17 | 26 | 495 | 422 | 943 |
| | Av. Annual change | -2% | 3% | 1% | 2% |
| Fraser Coast | 2011/12 | 14 | 282 | 60 | 357 |
| | 2016/17 | 15 | 244 | 134 | 393 |
| | Av. Annual change | 1% | -3% | 25% | 2% |
| Gold Coast | 2011/12 | 306 | 1,398 | 719 | 2,424 |
| | 2016/17 | 465 | 1,448 | 730 | 2,642 |
| | Av. Annual change | 10% | 1% | 0% | 2% |
| Mackay | 2011/12 | 7 | 185 | 145 | 336 |
| | 2016/17 | 5 | 180 | 68 | 253 |
| | Av. Annual change | -6% | -1% | -11% | -5% |
| Townsville | 2011/12 | 21 | 310 | 113 | 444 |
| | 2016/17 | 20 | 326 | 186 | 532 |
| | Av. Annual change | -1% | 1% | 13% | 4% |
| Outback^ | 2011/12 | 7 | 261 | np* | 323 |
| | 2016/17 | 4 | 347 | 90 | 442 |
| | Av. Annual change | -9% | 7% | np | 7% |
| Sunshine Coast | 2011/12 | 99 | 1,083 | 508 | 1,689 |
| | 2016/17 | 137 | 1,266 | 535 | 1,938 |
| | Av. Annual change | 8% | 3% | 1% | 3% |
| Tropical North Queensland | 2011/12 | 150 | 436 | 214 | 800 |
| | 2016/17 | 176 | 654 | 249 | 1,079 |
| | Av. Annual change | 3% | 10% | 3% | 7% |
| Whitsundays | 2011/12 | 21 | 224 | np* | 267 |
| | 2016/17 | 49 | 145 | np* | 231 |
| | Av. Annual change | 27% | -7% | np | -3% |
| Regional Queensland | 2011/12 | 684 | 5,260 | 2,608 | 8,553 |
| | 2016/17 | 933 | 5,843 | 2,782 | 9,558 |
| | Av. Annual change | 7% | 2% | 1% | 2% |
| **Queensland** | **2011/12** | **1,275** | **6,314** | **3,700** | **11,290** |
| | **2016/17** | **1,861** | **7,134** | **3,931** | **12,925** |
| | **Av. Annual change** | **9%** | **3%** | **1%** | **3%** |

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

# Caravan and camping

| Caravan and camping visitation | | | | | | | |
|---|---|---|---|---|---|---|---|
| | | Visitors (000) | | | Nights (000) | | |
| Stopover region | Financial year | Int'l | Dom. overnight | Total | Int'l | Dom. overnight | Total |
| Brisbane | 2011/12 | 20 | 146 | 166 | 124 | 532 | 656 |
| | 2016/17 | 27 | 131 | 158 | 163 | 478 | 640 |
| | Av. Annual change | 7% | -2% | -1% | 6% | -2% | 0% |
| Bundaberg | 2011/12 | 11 | 92* | 103 | 69 | 389* | 458 |
| | 2016/17 | 10 | 72* | 81 | 61 | 320* | 381 |
| | Av. Annual change | -2% | -4% | -4% | -2% | -4% | -3% |
| Central Queensland* | 2011/12 | 24 | 173 | 198 | 103 | 885 | 987 |
| | 2016/17 | 26 | 146 | 173 | 62 | 609 | 671 |
| | Av. Annual change | 1% | -3% | -3% | -8% | -6% | -6% |
| Southern Queensland Country | 2011/12 | 5* | 91 | 97 | 56* | 278 | 334 |
| | 2016/17 | 4* | 169 | 173 | 61* | 570 | 631 |
| | Av. Annual change | -5% | 17% | 16% | 2% | 21% | 18% |
| Fraser Coast | 2011/12 | 25 | 90* | 115 | 64 | 515* | 579 |
| | 2016/17 | 28 | 69* | 97 | 84 | 392* | 476 |
| | Av. Annual change | 2% | -5% | -3% | 7% | -5% | -4% |
| Gold Coast | 2011/12 | 17 | 122 | 139 | 51 | 575 | 626 |
| | 2016/17 | 21 | 131 | 152 | 57 | 636 | 694 |
| | Av. Annual change | 5% | 1% | 2% | 3% | 2% | 2% |
| Mackay | 2011/12 | 11 | 59* | 70 | 19 | 329* | 348 |
| | 2016/17 | 10 | 83* | 93 | 18 | 255* | 273 |
| | Av. Annual change | -2% | 8% | 7% | -2% | -4% | -4% |
| Townsville | 2011/12 | 24 | 63* | 87 | 80 | 166* | 246 |
| | 2016/17 | 25 | 61* | 86 | 69 | 209* | 277 |
| | Av. Annual change | 1% | -1% | 0% | -3% | 5% | 3% |
| Outback^ | 2011/12 | 7 | 89* | 96 | 29 | 512* | 542 |
| | 2016/17 | 8 | 93 | 101 | 24 | 453 | 477 |
| | Av. Annual change | 4% | 1% | 1% | -3% | -2% | -2% |
| Sunshine Coast | 2011/12 | 26 | 209 | 235 | 78 | 769 | 847 |
| | 2016/17 | 34 | 285 | 319 | 105 | 1,248 | 1,353 |
| | Av. Annual change | 6% | 7% | 7% | 7% | 12% | 12% |
| Tropical North Queensland | 2011/12 | 35 | 119 | 154 | 439 | 581 | 1,020 |
| | 2016/17 | 43 | 129 | 172 | 299 | 815 | 1,114 |
| | Av. Annual change | 4% | 2% | 2% | -6% | 8% | 2% |
| Whitsundays | 2011/12 | 25 | 60* | 85 | 120 | 216* | 335 |
| | 2016/17 | 30 | 64* | 95 | 79 | 161* | 241 |
| | Av. Annual change | 4% | 2% | 2% | -7% | -5% | -6% |
| Regional Queensland | 2011/12 | 78 | 913 | 991 | 1,108 | 5,213 | 6,321 |
| | 2016/17 | 87 | 969 | 1,056 | 919 | 5,669 | 6,589 |
| | Av. Annual change | 2% | 1% | 1% | -3% | 2% | 1% |
| **Queensland** | **2011/12** | **82** | **1,034** | **1,116** | **1,233** | **5,745** | **6,978** |
| | **2016/17** | **95** | **1,073** | **1,168** | **1,082** | **6,147** | **7,229** |
| | **Av. Annual change** | **3%** | **1%** | **1%** | **-2%** | **1%** | **1%** |

Source: Tourism Research Australia

| Caravan and camping visitation | | | | |
|---|---|---|---|---|
| | | Regional expenditure ($m) | | |
| **Stopover region** | **Financial year** | **Int'l** | **Dom. Overnight** | **Total** |
| Brisbane | 2011/12 | 11 | 68 | 79 |
| | 2016/17 | 12 | 44 | 56 |
| | Av. Annual change | 2% | -7% | -6% |
| Bundaberg | 2011/12 | 2 | 27* | 29 |
| | 2016/17 | 2 | 29* | 31 |
| | Av. Annual change | 0% | 1% | 1% |
| Central Queensland* | 2011/12 | 8 | 88 | 96 |
| | 2016/17 | 2 | 78 | 80 |
| | Av. Annual change | -15% | -2% | -3% |
| Southern Queensland Country | 2011/12 | 3* | 28 | 31 |
| | 2016/17 | 2* | 70 | 72 |
| | Av. Annual change | -7% | 30% | 26% |
| Fraser Coast | 2011/12 | 5 | 45* | 50 |
| | 2016/17 | 5 | 39* | 44 |
| | Av. Annual change | 0% | -3% | -2% |
| Gold Coast | 2011/12 | 6 | 111 | 117 |
| | 2016/17 | 7 | 101 | 108 |
| | Av. Annual change | 3% | -2% | -2% |
| Mackay | 2011/12 | 1 | 23* | 24 |
| | 2016/17 | 1 | 29* | 30 |
| | Av. Annual change | 0% | 5% | 5% |
| Townsville | 2011/12 | 6 | 29* | 35 |
| | 2016/17 | 5 | 32* | 37 |
| | Av. Annual change | -3% | 2% | 1% |
| Outback^ | 2011/12 | 2 | 99 | 101 |
| | 2016/17 | 1 | 63 | 64 |
| | Av. Annual change | -10% | -7% | -7% |
| Sunshine Coast | 2011/12 | 8 | 82 | 90 |
| | 2016/17 | 9 | 147 | 156 |
| | Av. Annual change | 3% | 16% | 15% |
| Tropical North Queensland | 2011/12 | 38 | 97 | 135 |
| | 2016/17 | 37 | 95 | 132 |
| | Av. Annual change | -1% | 0% | 0% |
| Whitsundays | 2011/12 | 9 | 35* | 44 |
| | 2016/17 | 11 | 28* | 39 |
| | Av. Annual change | 4% | -4% | -2% |
| Regional Queensland | 2011/12 | 87 | 663 | 750 |
| | 2016/17 | 81 | 712 | 793 |
| | Av. Annual change | -1% | 1% | 1% |
| **Queensland** | **2011/12** | **98** | **731** | **829** |
| | **2016/17** | **93** | **756** | **849** |
| | **Av. Annual change** | **-1%** | **1%** | **0%** |

*one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.

# 2026-27 projections

## Visitor nights and self-drive visitation

| QLD | All tourism nights (000) | | | | |
|---|---|---|---|---|---|
| | Brisbane | | Regional QLD | | |
| | International | Domestic overnight | International | Domestic overnight | Total |
| 2017-18 | 39,829 | 33,713 | 19,059 | 53,256 | 145,856 |
| 2018-19 | 42,566 | 34,502 | 20,090 | 54,808 | 151,966 |
| 2019-20 | 45,154 | 35,200 | 21,096 | 56'232 | 157,683 |
| 2020-21 | 47,712 | 35,880 | 22,132 | 57,642 | 163,365 |
| 2021-22 | 50,405 | 36,548 | 23,242 | 59,035 | 169,231 |
| 2022-23 | 53,212 | 37,205 | 24,421 | 60,411 | 175,248 |
| 2023-24 | 56,162 | 37,866 | 25,630 | 61,797 | 181,455 |
| 2024-25 | 59,260 | 38,529 | 26,898 | 63,193 | 187,879 |
| 2025-26 | 62,545 | 39,195 | 28,230 | 64,598 | 194,567 |
| 2026-27 | 65,997 | 39,862 | 29,613 | 66,012 | 201,484 |

| QLD | Self drive tourism nights (000) | | | | |
|---|---|---|---|---|---|
| | Brisbane | | Regional QLD | | |
| | International | Domestic overnight | International | Domestic overnight | Total |
| 2017-18 | 19,516 | 17,531 | 9,339 | 27,693 | 74,079 |
| 2018-19 | 20,857 | 17,941 | 9,352 | 46,880 | 95,030 |
| 2019-20 | 22,125 | 18,304 | 9,820 | 48,099 | 98,349 |
| 2020-21 | 23,379 | 18,657 | 10,302 | 49,304 | 101,643 |
| 2021-22 | 24,699 | 19,005 | 10,819 | 50,496 | 105,019 |
| 2022-23 | 26,074 | 19,347 | 11,368 | 51,673 | 108,461 |
| 2023-24 | 27,520 | 19,690 | 11,930 | 52,859 | 111,999 |
| 2024-25 | 29,037 | 20,035 | 12,521 | 54,052 | 115,645 |
| 2025-26 | 30,647 | 20,381 | 13,141 | 55,254 | 119,423 |
| 2026-27 | 32,339 | 20,728 | 13,785 | 56,464 | 123,315 |

# 2026-27 projections

## Expenditure — capital city and regional QLD

| QLD | Overnight visitor expenditure ($m) | | |
|---|---|---|---|
| | Brisbane | Regional QLD | |
| | Total | Total | Total |
| 2017-18 | 6,199 | 15,045 | 21,244 |
| 2018-19 | 6,496 | 15,583 | 22,078 |
| 2019-20 | 6,773 | 16,088 | 22,861 |
| 2020-21 | 7,046 | 16,597 | 23,643 |
| 2021-22 | 7,329 | 17,118 | 24,447 |
| 2022-23 | 7,621 | 17,649 | 25,270 |
| 2023-24 | 7,925 | 18,189 | 26,115 |
| 2024-25 | 8,242 | 18,743 | 26,986 |
| 2025-26 | 8,575 | 19,313 | 27,888 |
| 2026-27 | 8,922 | 19,895 | 28,817 |

## Data notes:

**Source**

- Tourism Research Australia (TRA)

**Employment**

- Estimates for each tourism region have been sourced from TRA's 2016-17 Regional Tourism Satellite Accounts.

**Visitor Estimates**

- Components may not add to totals as visitors may visit more than one tourism region on a trip.

**Expenditure Estimates**

- Expenditure excludes all motor vehicle, capital and major equipment purchases and for international visitors any pre-purchased international airfares and 70 per cent of pre-purchased packages assumed to be spent outside Australia.
- For self-drive, expenditure for each tourism region refers to total expenditure in that region by visitors who arrived by self-drive vehicle.
- For caravan and camping, expenditure for each tourism region refers to total expenditure in that region by visitors who stayed in a commercial caravan park or camping ground during their visit.

**Tourism Region Estimates**

- Tourism regions estimates for nearly all metrics are based on the region boundaries which applied in 2017. The caravan and camping expenditure estimates are based on 2018 region boundaries. The differences between 2017 and 2018 region boundaries are negligible.
- Where a tourism region is asterisked (*) one or more of the estimates is subject to high sampling variability. In these instances, the estimates and growth rates reported should be treated with caution.
- The Gold Coast tourism region is included in Regional Queensland estimates.

**Inclusions and Exclusions**

- Regional, State and National totals include relevant estimates from tourism regions where data has been confidentialised and not published (i.e. np cells).
- Regional, State and National totals exclude stopovers by visitors to unspecified, offshore and/or transit locations.

**Projections**

- Visitor overnight forecasts derived from TRA data
- Self-drive visits and visitor nights have been calculated using a five-year average of the percentage self-drive represents of all tourism
- Expenditure forecasts have been calculated using visitor nights as a pro rata proxy
- Care should be used when using forecasted numbers. Domestic and international geopolitical and economic events outside the scope of this report can impact both domestic and international visitor numbers, travel patterns and expenditure.

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