

# CUMMINGS ECONOMICS

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## TRENDS IN TOURISM IN TROPICAL NORTH QUEENSLAND Note 1 : Market Share Analysis

### 1. Introduction

The following analyses statistical data from the International Visitor Survey (IVS) and the National (Domestic) Visitor Survey (NVS) to identify how the region's tourism has been progressing on a wider basis.

### 2. Significant Findings

Queensland's share of international visitors to Australia has fallen by 10% points from 43% to 33% over the 12 years 2005-06 to 2017-18.

Some 70% of this fall is associated with the fall in the Australian market share of the Cairns TNQ region.

Over the past six years, Queensland's share of domestic visitors has fallen by 2% points from a peak of 24.5% in 2011-12 to 22.4% in 2017-18. Brisbane held its proportion. The fall was widespread around the regions.

### 3. International Visitors

Table #1 and Chart #2 show proportions of international visitors to Australia visiting Queensland and key regions over the period 2005-06 to 2017-18. Table #3 and Chart #4 show the same data but for international holiday purpose visitors only.

It can be seen that Queensland has steadily lost market share with greatest loss in TNQ. This market share loss is shared by the Northern Territory, especially Alice Springs.

It can be seen that the market share loss is especially due to loss of holiday visitors.

In Queensland, the market share loss is most pronounced in the TNQ region. Of a total loss of (-9.96%), some (-7.01%) is associated with the TNQ loss. In other words, loss of TNQ market share has contributed to 70% of Queensland's total loss.

For holiday purpose visitors, Queensland's loss was 12.65% with 8.25% associated with TNQ, ie. the TNQ loss contributed 65% to the total.

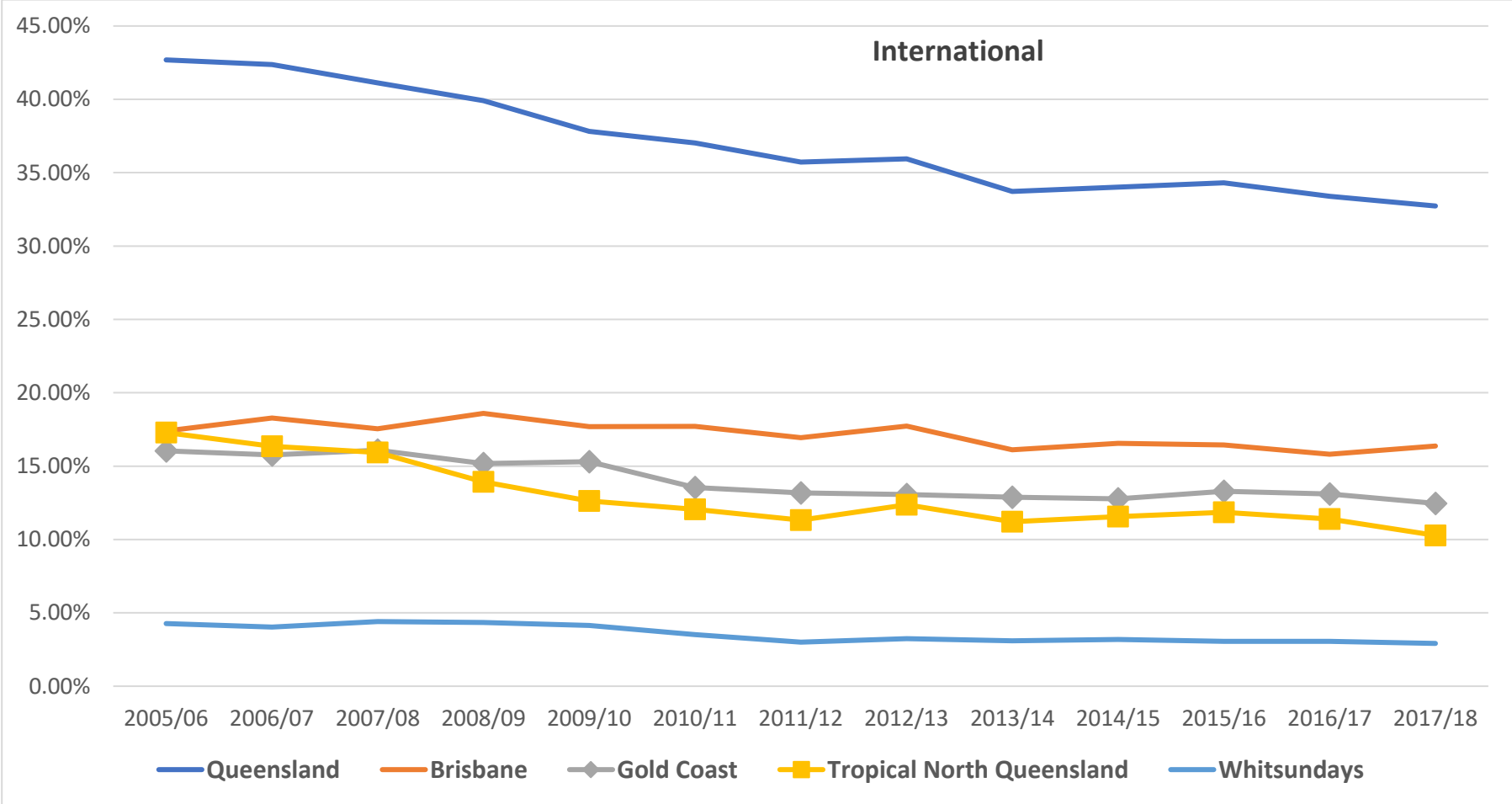
It can be seen from the charts, that very strong losses occurred 2008-09 through to 2011-12, but since then, has not recovered market share and continued to drift down marginally both for total and for holiday visitors.

**Table #1: International Visitors to Australia – Share Queensland - Key Regions**

Calendar year	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Difference
Australia	5,006,831	5,151,256	5,133,891	5,044,855	5,189,565	5,369,942	5,438,430	5,714,273	6,161,097	6,567,214	7,246,472	7,878,024	8,362,774	3,355,943
Queensland	2,137,412	2,182,445	2,111,588	2,013,628	1,963,003	1,988,352	1,942,721	2,054,027	2,077,301	2,233,736	2,486,019	2,630,093	2,737,314	599,902
Brisbane	871,068	941,925	900,476	938,122	918,403	951,509	921,679	1,012,937	992,596	1,087,308	1,191,127	1,245,536	1,369,755	498,687
Gold Coast	803,310	812,387	825,836	765,572	794,188	727,096	716,877	747,028	793,291	838,596	962,664	1,032,438	1,042,068	238,758
Tropical North Queensland	865,496	842,303	818,158	702,908	655,308	647,247	615,656	706,708	690,991	758,805	859,564	898,282	859,723	(-5,773)
Whitsundays	213,713	207,805	226,176	219,013	214,802	188,470	163,196	184,769	190,290	209,748	221,993	241,241	243,731	30,019
	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Difference
Queensland	42.69%	42.37%	41.13%	39.91%	37.83%	37.03%	35.72%	35.95%	33.72%	34.01%	34.31%	33.39%	32.73%	(-9.96%)
Brisbane	17.40%	18.29%	17.54%	18.60%	17.70%	17.72%	16.95%	17.73%	16.11%	16.56%	16.44%	15.81%	16.38%	(-1.02%)
Gold Coast	16.04%	15.77%	16.09%	15.18%	15.30%	13.54%	13.18%	13.07%	12.88%	12.77%	13.28%	13.11%	12.46%	(-3.58%)
Tropical North Queensland	17.29%	16.35%	15.94%	13.93%	12.63%	12.05%	11.32%	12.37%	11.22%	11.55%	11.86%	11.40%	10.28%	(-7.01%)
Whitsundays	4.27%	4.03%	4.41%	4.34%	4.14%	3.51%	3.00%	3.23%	3.09%	3.19%	3.06%	3.06%	2.91%	(-1.35%)

Source: Cummings Economics from Tourism Research Australia – IVS.

Chart #2: International Visitors to Australia – Share Queensland - Key Regions



Source: Cummings Economics from Tourism Research Australia – IVS.

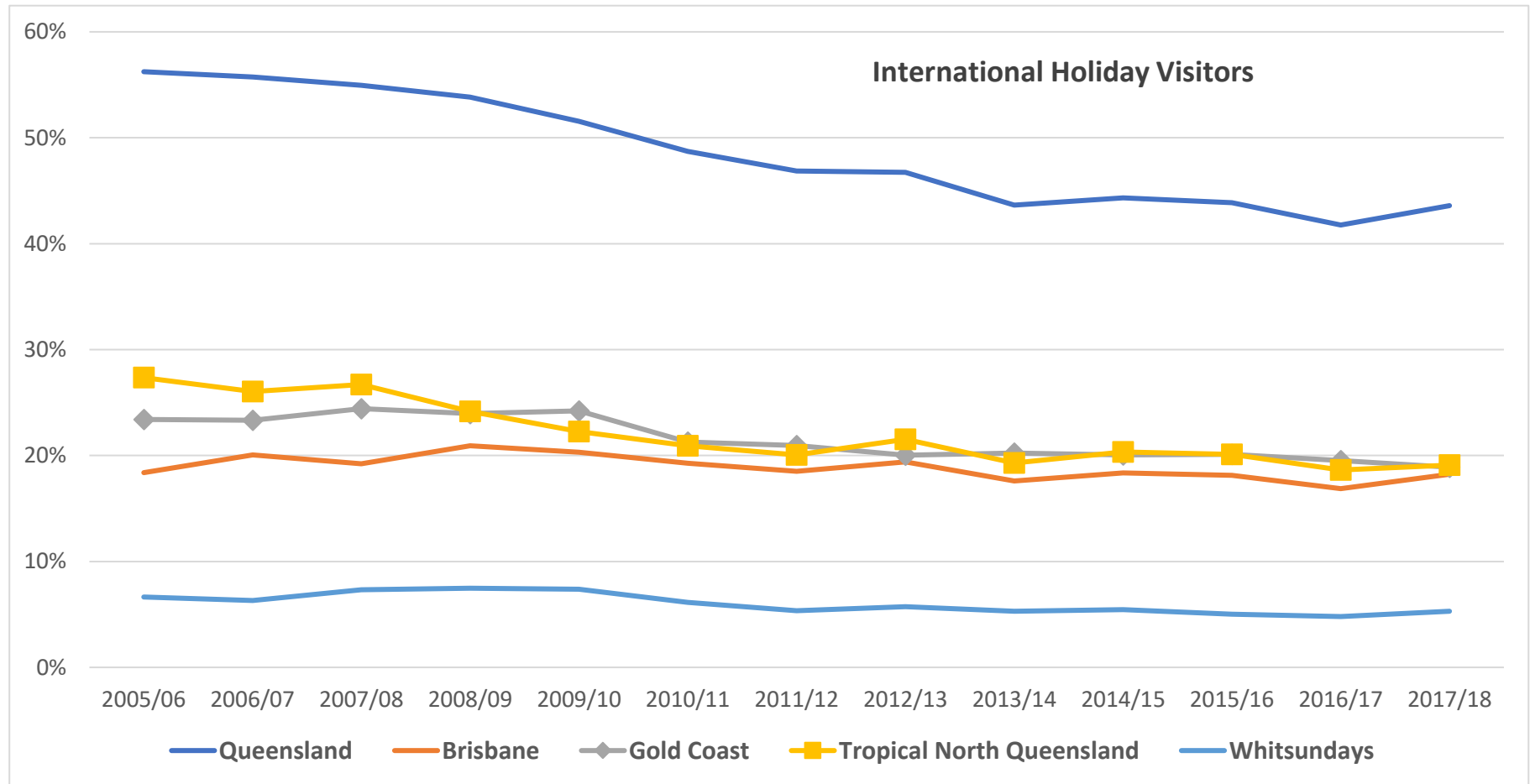


**Table #3: International Visitors to Australia – Holiday Purpose Share Queensland - Key Regions**

Calendar year	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Difference
Australia	2,589,387	2,586,281	2,467,162	2,335,244	2,353,175	2,386,387	2,371,605	2,537,707	2,777,610	2,908,977	3,535,657	3,926,513	1,973,552	(-615,835)
Queensland	1,456,202	1,441,457	1,355,647	1,257,450	1,213,044	1,162,772	1,111,217	1,185,769	1,212,447	1,289,496	1,551,136	1,639,874	860,156	(-596,046)
Brisbane	476,181	518,780	474,449	488,604	478,011	459,770	439,144	492,204	488,502	533,797	641,237	662,564	359,641	(-116,540)
Gold Coast	605,866	603,597	602,649	559,882	570,166	507,567	496,578	508,702	562,299	583,274	711,403	767,056	372,959	(-232,908)
Tropical North Queensland	708,222	673,801	658,634	564,176	524,162	499,002	475,919	546,487	535,921	591,858	710,750	731,785	376,949	(-331,273)
Whitsundays	171,697	163,008	180,887	174,523	173,703	146,459	126,900	145,459	147,256	158,499	177,877	188,424	104,562	(-67,135)
	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	Difference
Queensland	56%	56%	55%	54%	52%	49%	47%	47%	44%	44%	44%	42%	44%	(-12.65%)
Brisbane	18%	20%	19%	21%	20%	19%	19%	19%	18%	18%	18%	17%	18%	(-0.17%)
Gold Coast	23%	23%	24%	24%	24%	21%	21%	20%	20%	20%	20%	20%	19%	(-4.50%)
Tropical North Queensland	27%	26%	27%	24%	22%	21%	20%	22%	19%	20%	20%	19%	19%	(-8.25%)
Whitsundays	7%	6%	7%	7%	7%	6%	5%	6%	5%	5%	5%	5%	5%	(-1.33%)

Source: Cummings Economics from Tourism Research Australia – IVS.

Chart #4: International Visitors to Australia – Holiday Purpose Share Queensland - Key Regions



Source: Cummings Economics from Tourism Research Australia – IVS.



#### 4. Domestic Visitors

(Caution: Experience indicates that the National Visitor Survey (NVS) is less reliable in recording short term (year-on-year) change at a regional level and trends over a number of years only should be considered.)

Table #5 and Chart #6 show domestic visitor market share by Queensland, Northern Territory and key regions 2005-06 to 2017-18. Table #7 and Chart #8 give similar data for holiday purpose visitors only.

It can be seen that after generally rising up to 2011-12, Queensland's share has drifted down to be only marginally up in 2017-18 on 2005-06.

Domestic holiday purpose visitors' data again illustrates that much of the change in the upward movements of domestic visitor share, from about 2005-06 to about 2010-11 and the subsequent downward movements, were due to changes in holiday visitor share. Indeed, the downward movement in share over the past five years or so is very pronounced for holiday visitors and that the 2017-18 share is marginally down on the 2005-06 share.

The indication from the data is that while Brisbane holiday visitor share rose over the past five years, the downward trends for Queensland was heavily influenced by downward trends in each of the three key regions recorded – Gold Coast, TNQ and Whitsunday.

By contrast, over the past five years, the Northern Territory recorded a rise in share of domestic visitors although in the last year, the share weakened.

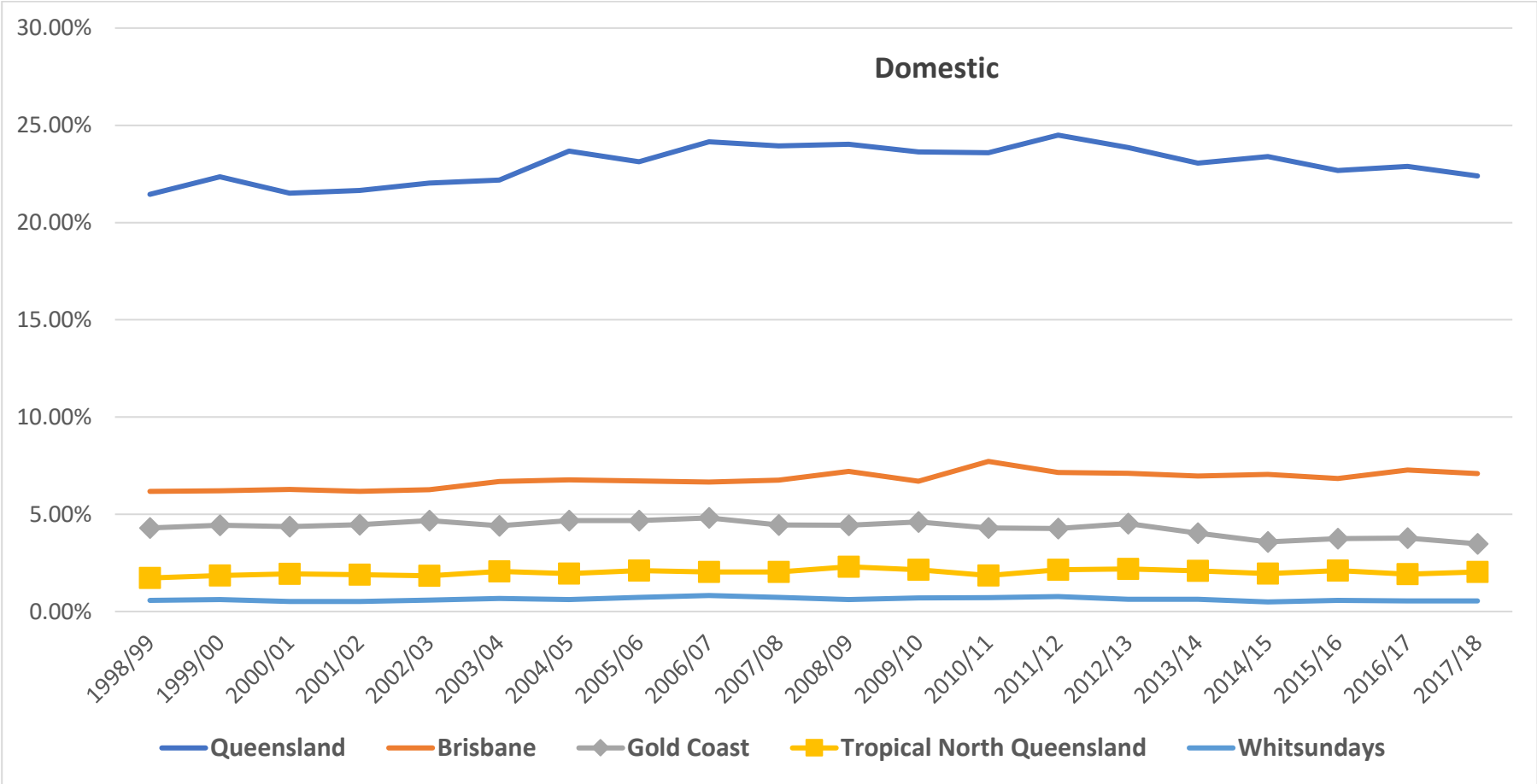
**TRENDS IN TOURISM IN TROPICAL NORTH QUEENSLAND**  
**Note 1 : Market Share Analysis**

**Table #5: Domestic Visitors in Australia – Market Share Queensland - Key Regions**

	1998/ 99	1999/ 00	2000/ 01	2001/ 02	2002/ 03	2003/ 04	2004/ 05	2005/ 06	2006/ 07	2007/ 08	2008/ 09	2009/ 10	2010/ 11	2011/ 12	2012/ 13	2013/ 14	2014/ 15	2015/ 16	2016/ 17	2017/ 18	Difference
Australia	73,830	72,017	73,819	75,047	75,216	74,356	72,179	71,934	73,770	73,527	68,539	68,143	70,977	73,369	75,268	80,332	85,317	89,071	93,708	100,269	26,440
Queensland	15,838	16,103	15,881	16,247	16,574	16,492	17,088	16,638	17,819	17,607	16,465	16,107	16,745	17,973	17,958	18,522	19,957	20,205	21,453	22,457	6,619
Brisbane	4,561	4,474	4,632	4,643	4,716	4,969	4,885	4,831	4,909	4,970	4,937	4,569	5,479	5,249	5,349	5,599	6,017	6,088	6,815	7,118	2,557
Gold Coast	3,176	3,193	3,228	3,349	3,514	3,279	3,375	3,361	3,551	3,278	3,044	3,138	3,047	3,137	3,406	3,235	3,055	3,346	3,534	3,492	315
TNQ	1,275	1,337	1,430	1,423	1,381	1,531	1,407	1,512	1,501	1,498	1,578	1,467	1,315	1,576	1,645	1,679	1,670	1,880	1,805	2,041	766
Whitsundays	421	445	386	385	441	499	441	523	609	531	421	477	505	566	473	511	421	512	515	551	130
	1998/ 99	1999/ 00	2000/ 01	2001/ 02	2002/ 03	2003/ 04	2004/ 05	2005/ 06	2006/ 07	2007/ 08	2008/ 09	2009/ 10	2010/ 11	2011/ 12	2012/ 13	2013/ 14	2014/ 15	2015/ 16	2016/ 17	2017/ 18	Difference
Queensland	21.45%	22.36%	21.51%	21.65%	22.04%	22.18%	23.67%	23.13%	24.16%	23.95%	24.02%	23.64%	23.59%	24.50%	23.86%	23.06%	23.39%	22.68%	22.89%	22.40%	0.94%
Brisbane	6.18%	6.21%	6.28%	6.19%	6.27%	6.68%	6.77%	6.72%	6.65%	6.76%	7.20%	6.70%	7.72%	7.15%	7.11%	6.97%	7.05%	6.83%	7.27%	7.10%	0.92%
Gold Coast	4.30%	4.43%	4.37%	4.46%	4.67%	4.41%	4.68%	4.67%	4.81%	4.46%	4.44%	4.60%	4.29%	4.28%	4.53%	4.03%	3.58%	3.76%	3.77%	3.48%	(-0.82%)
TNQ	1.73%	1.86%	1.94%	1.90%	1.84%	2.06%	1.95%	2.10%	2.03%	2.04%	2.30%	2.15%	1.85%	2.15%	2.19%	2.09%	1.96%	2.11%	1.93%	2.04%	0.31%
Whitsundays	0.57%	0.62%	0.52%	0.51%	0.59%	0.67%	0.61%	0.73%	0.83%	0.72%	0.61%	0.70%	0.71%	0.77%	0.63%	0.64%	0.49%	0.58%	0.55%	0.55%	(-0.02%)

Source: Cummings Economics from Tourism Research Australia – NVS.

Chart #6: Domestic Visitors to Australia – Market Share Queensland - Key Regions



Source: Cummings Economics from Tourism Research Australia – NVS.



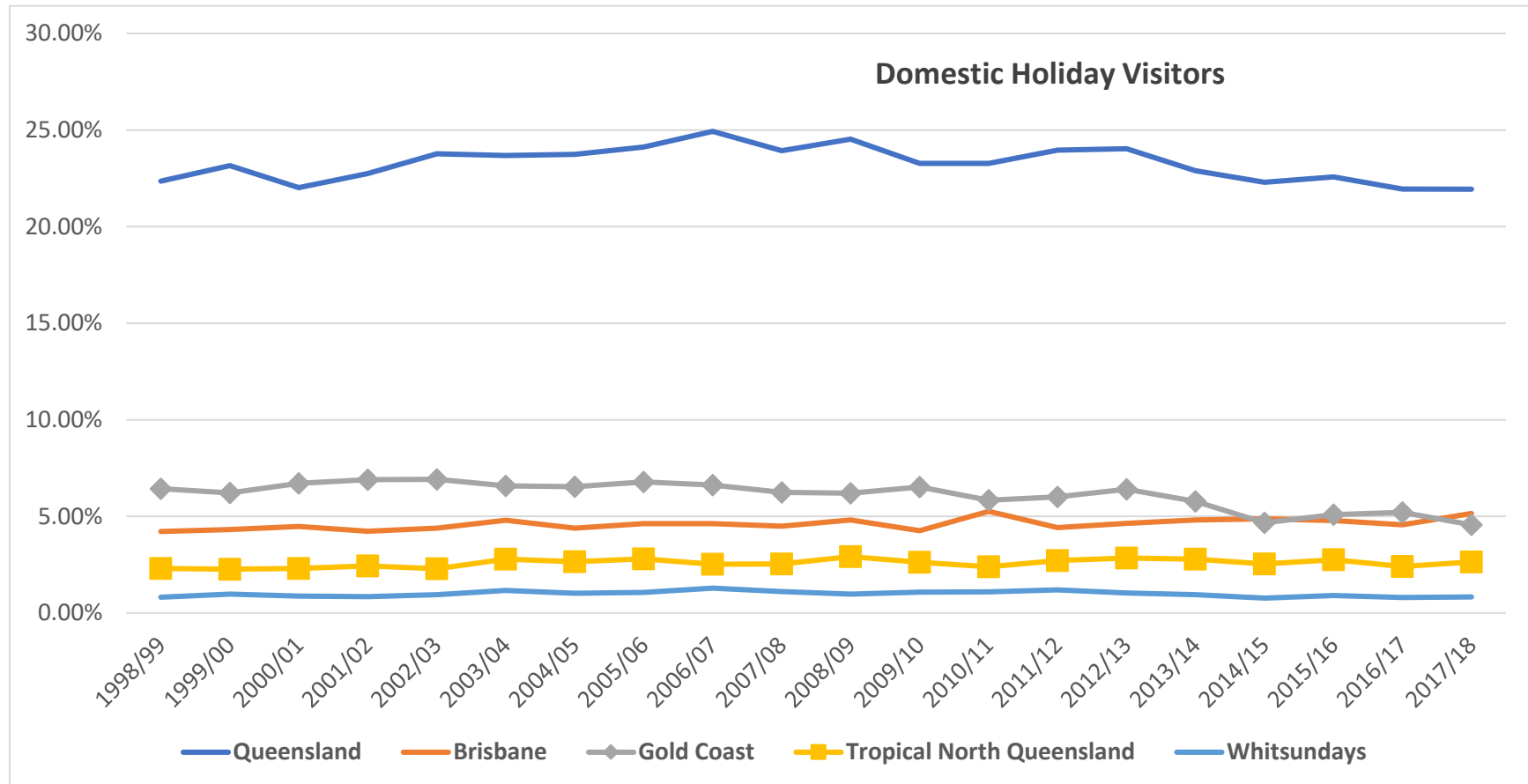


**Table #7: Domestic Visitors in Australia – Holiday Purpose Market Share Queensland - Key Regions**

	1998/ 99	1999/ 00	2000/ 01	2001/ 02	2002/ 03	2003/ 04	2004/ 05	2005/ 06	2006/ 07	2007/ 08	2008/ 09	2009/ 10	2010/ 11	2011/ 12	2012/ 13	2013/ 14	2014/ 15	2015/ 16	2016/ 17	2017/ 18	Difference
Australia	32,737	32,245	32,724	32,422	31,522	31,270	31,026	31,065	32,368	32,680	30,899	31,165	30,955	31,074	32,690	34,351	34,822	36,890	37,753	40,551	7,815
Queensland	7,317	7,469	7,207	7,374	7,493	7,406	7,365	7,493	8,070	7,818	7,580	7,252	7,202	7,447	7,855	7,866	7,762	8,327	8,287	8,895	1,579
Brisbane	1,381	1,394	1,465	1,370	1,382	1,499	1,360	1,438	1,495	1,466	1,487	1,327	1,628	1,373	1,514	1,655	1,698	1,767	1,725	2,085	704
Gold Coast	2,107	2,003	2,197	2,239	2,181	2,059	2,028	2,106	2,143	2,039	1,915	2,031	1,806	1,867	2,093	1,982	1,624	1,880	1,965	1,850	(-257)
TNQ	753	730	753	788	719	869	825	869	814	827	901	820	740	842	930	958	881	1,015	908	1,067	314
Whitsundays	268	316	283	272	300	363	318	332	416	362	302	334	339	369	337	324	268	333	301	335	67
	1998/ 99	1999/ 00	2000/ 01	2001/ 02	2002/ 03	2003/ 04	2004/ 05	2005/ 06	2006/ 07	2007/ 08	2008/ 09	2009/ 10	2010/ 11	2011/ 12	2012/ 13	2013/ 14	2014/ 15	2015/ 16	2016/ 17	2017/ 18	Difference
Queensland	22.35%	23.16%	22.02%	22.74%	23.77%	23.69%	23.74%	24.12%	24.93%	23.92%	24.53%	23.27%	23.27%	23.96%	24.03%	22.90%	22.29%	22.57%	21.95%	21.94%	(-0.41%)
Brisbane	4.22%	4.32%	4.48%	4.22%	4.38%	4.79%	4.38%	4.63%	4.62%	4.49%	4.81%	4.26%	5.26%	4.42%	4.63%	4.82%	4.88%	4.79%	4.57%	5.14%	0.92%
Gold Coast	6.44%	6.21%	6.71%	6.91%	6.92%	6.58%	6.54%	6.78%	6.62%	6.24%	6.20%	6.52%	5.83%	6.01%	6.40%	5.77%	4.66%	5.10%	5.20%	4.56%	(-1.87%)
TNQ	2.30%	2.27%	2.30%	2.43%	2.28%	2.78%	2.66%	2.80%	2.52%	2.53%	2.92%	2.63%	2.39%	2.71%	2.85%	2.79%	2.53%	2.75%	2.40%	2.63%	0.33%
Whitsundays	0.82%	0.98%	0.87%	0.84%	0.95%	1.16%	1.02%	1.07%	1.28%	1.11%	0.98%	1.07%	1.10%	1.19%	1.03%	0.94%	0.77%	0.90%	0.80%	0.83%	0.01%

Source: Cummings Economics from Tourism Research Australia – NVS.

Chart #8: Domestic Visitors to Australia – Holiday Purpose Market Share Queensland - Key Regions



Source: Cummings Economics from Tourism Research Australia – NVS.

