

# Domestic Tourism Snapshot

Year ending September 2021

## Domestic overnight visitors within Australia

	Visitors	Annual <sup>1</sup> Change vs YE	Dec 2019	Avg <sup>2</sup> stay	Annual # change
<b>Total Australia<sup>3</sup></b>	<b>82,685,000</b>	<b>3.0%</b>	<b>-29.6%</b>	<b>3.9</b>	<b>0.2</b>
Holiday	37,460,000	21.6%	-19.0%	4.0	0.2
VFR <sup>4</sup>	27,115,000	-2.0%	-32.1%	3.4	0.2
Business	14,560,000	-19.7%	-46.2%	4.1	0.2

<b>Intrastate</b>	<b>66,880,000</b>	<b>8.8%</b>	<b>-17.8%</b>	<b>3.3</b>	<b>0.1</b>
Holiday	31,398,000	26.8%	-7.7%	3.5	0.2
VFR <sup>4</sup>	20,977,000	-1.3%	-26.1%	2.6	0.0
Business	11,033,000	-7.7%	-25.2%	3.8	0.0

<b>Interstate</b>	<b>17,245,000</b>	<b>-14.3%</b>	<b>-55.0%</b>	<b>5.9</b>	<b>0.8</b>
Holiday	6,638,000	1.1%	-49.7%	5.9	0.6
VFR <sup>4</sup>	6,384,000	-3.8%	-46.5%	6.0	0.6
Business	3,765,000	-41.1%	-70.0%	4.8	0.8

## Domestic overnight visitor expenditure in Australia

	Expenditure	Annual <sup>1</sup> Change vs YE	Dec 2019
<b>Total Australia<sup>5</sup></b>	<b>\$60,946.9m</b>	<b>17.5%</b>	<b>-24.5%</b>
Holiday <sup>6</sup>	\$32,461.3m	42.0%	-3.2%
VFR <sup>6</sup>	\$9,430.2m	13.7%	-25.1%
Business <sup>6</sup>	\$8,143.2m	-13.1%	-46.7%



The year ending September 2021 (i.e. 1 October 2020 – 30 September 2021) reflects a year where international borders were closed and in the domestic market there were seven months (December 2020 to June 2021) where Queensland's borders were open to interstate travellers albeit with intermittent outbreaks causing border closures and lockdowns, prior to the Delta outbreaks. Since 23 June 2021 Queensland has had its borders closed to Greater Sydney; to all of New South Wales from 22 July and since 17 July 2021 they have been closed to Victoria.

Due to these factors at the total level (international and domestic overnight), travel was down significantly compared to 2019 at the national level, with overnight visitor expenditure (OVE) down 44.9%, and visitation down 34.3 per cent. While overall performance remains significantly below pre-COVID levels we see that domestic holiday travel, particularly intrastate travel given restrictions, has seen solid performance in some areas, as Australians have holidayed at home when they have been able to.

### Nationally, holidays are the main reason to travel

A total of 82.7 million domestic overnight trips were taken in Australia in the year ending September 2021, which is down 29.6 per cent compared to the pre-COVID-19 benchmark of the year ending December 2019. Overnight visitor expenditure (OVE) was \$60.9 billion, which is 24.5 per cent lower than the year ending December 2019.

National OVE was lower across all visitor purposes compared to the pre-COVID-19 period. Having said that, holiday OVE (down 3.2 per cent compared to 2019 to \$32.5b) was far closer to 2019 levels than the other travel purposes. Business OVE was 46.7 per cent lower than the pre-COVID-19 period at \$8.1b and visiting friends and relatives (VFR) visitor expenditure was down 25.1 per cent to \$9.4b. Holiday visitation was 19.0 per cent lower than 2019 at 37.5m; business visitation was 46.2 per cent lower than 2019 at 14.6m and VFR visitation was 32.1 per cent lower than 2019 at 27.1m.

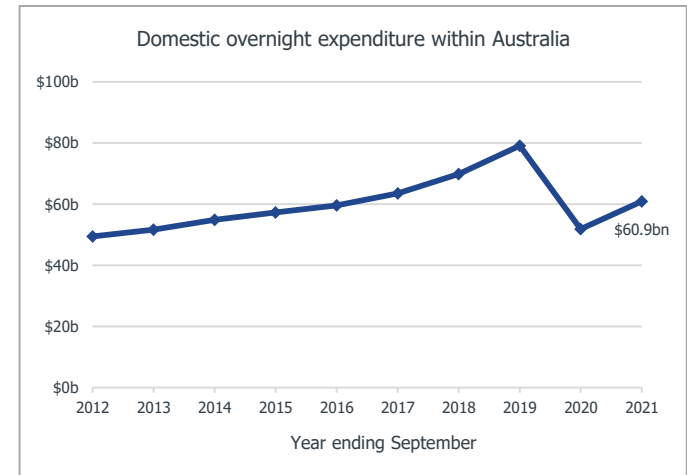
Reflecting various state hotspots and border restrictions over the year intrastate visitation and OVE outperformed interstate. Intrastate visitation decreased 17.8 per cent compared to 2019 and while intrastate OVE was only down 4.3 per cent compared to 2019 to 41.4b. At the national level, intrastate spend has been boosted by a 0.4 night increase of the intrastate average length of stay to 3.3 nights and a 1.6 per cent increase in the intrastate average spend per night since 2019 to \$186 per night. Intrastate holiday overnight visitor expenditure has been particularly strong, increasing 26.8 per cent compared to 2019 to 23.1b, while both intrastate VFR (down 13.2 per cent to 5.7b) and intrastate business OVE (down 24.1% to \$5.0b) decreased. On the other hand interstate travel in Australia halved (down 55.0 per cent compared to 2019 to 17.2 million visitors and OVE decreased 47.8% to \$19.5b.

### September quarter affected by the delta strain

With both New South Wales and Victoria imposing prolonged restrictions in the face of the Delta strain outbreaks, OVE in the September quarter 2021 was 55.3 per cent lower than in the September quarter 2019 and total visitation was down 58.2 per cent. By purpose, VFR visitation was down the most (down 66.5 per cent) followed by business visitation (down 59.1 per cent) and holiday visitation (down 52.2 per cent).

## September quarter 2021 overnight visitors in Australia

	Visitors Sep QTR 2021	Visitors Sep QTR 2019	Change vs Sep qtr 2019
<b>Total Australia</b>	<b>11,821,000</b>	<b>28,265,000</b>	<b>-58.2%</b>
Holiday	5,049,000	10,573,000	-52.2%
VFR <sup>4</sup>	3,171,000	9,465,000	-66.5%
Business	2,909,000	7,104,000	-59.1%



# Domestic Tourism Snapshot

Year ending September 2021

## Domestic overnight visitors in Queensland

	Visitors	Annual change	Change vs YE Dec 2019	Avg stay	Annual # change
<b>Total Queensland</b>	<b>20,313,000</b>	<b>9.8%</b>	<b>-21.6%</b>	<b>4.1</b>	<b>0.1</b>
Holiday	8,725,000	27.3%	-12.8%	4.5	0.5
VFR	6,698,000	3.7%	-25.1%	3.5	0.0
Business	4,001,000	-4.5%	-34.7%	3.9	-0.2
<b>Intrastate</b>	<b>16,381,000</b>	<b>12.3%</b>	<b>-7.9%</b>	<b>3.5</b>	<b>0.0</b>
Holiday	7,007,000	32.0%	5.3%	3.7	0.4
VFR	5,335,000	4.1%	-17.3%	2.7	-0.1
Business	3,218,000	-0.6%	-18.1%	3.9	-0.3
<b>Interstate</b>	<b>3,932,000</b>	<b>0.6%</b>	<b>-51.6%</b>	<b>6.6</b>	<b>0.8</b>
Holiday	1,718,000	11.2%	-48.7%	7.5	1.2
VFR	1,363,000	1.9%	-45.3%	6.5	0.5
Business	783,000	-17.8%	-64.4%	3.8	0.3

## Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change	Change vs YE Dec 2019
<b>Total Queensland</b> <sup>5</sup>	<b>\$16,576.8m</b>	<b>27.8%</b>	<b>-14.7%</b>
Holiday <sup>6</sup>	\$9,177.3m	52.3%	4.1%
VFR <sup>6</sup>	\$2,381.0m	20.7%	-17.5%
Business <sup>6</sup>	\$2,036.3m	0.1%	-38.1%



Queensland's domestic OVE was down 14.7 per cent compared to the year ending December 2019 to \$16.6b on the back of visitation decreasing by 21.6 per cent to 20.3m. Despite the decline at the overall level, domestic holiday OVE reached a record \$9.2 billion (up by 4.1 per cent compared to 2019). On the other hand, VFR OVE was down 17.5 per cent to \$2.4 billion and business OVE was down 38.1 per cent to \$2.0 billion compared with 2019 levels.

### Intrastate visitors spend grows

Queensland's intrastate visitation was down 7.9 per cent compared to 2019 but intrastate OVE continued to grow, increasing by 6.1 per cent to \$10.8 billion. The reason for the increase in intrastate spend was a 9.2 per cent increase in average spend per night since 2019 to \$191 per night. There was a small increase in the intrastate average length of stay (by 0.2 nights to 3.5 nights), however, intrastate visitor nights decreased 2.8 per cent to 56.7 million. The increase in spend has been due to intrastate holiday visitors who have increased their total spend by 44.3 per cent since 2019 to \$5.8b, with visitors increasing their spend on both accommodation and food and drink when compared to 2019. Both intrastate VFR and intrastate business visitor expenditure remains down compared to 2019.

### Queensland's September quarter results

With Delta outbreak lockdowns affecting both New South Wales and Victoria for extended periods during the September quarter, Queensland outperformed the national average growth for both OVE and visitation. OVE in Queensland in the September quarter 2021 totalled \$3.4b, which was down 37.4 per cent compared to the pre-COVID-19 September quarter 2019. With borders closed to Queensland's largest interstate markets, interstate OVE decreased by 70.1 per cent compared to the September quarter 2019 while intrastate OVE was up by 1.5 per cent.

The growth in intrastate OVE was due to holiday visitors spending an extra \$361 million in the September quarter 2021 than in the September quarter 2019. Half (50 per cent) of this increased expenditure was on accommodation and a third (33 per cent) was on food and drinks. Organised tours and entertainment accounted for 8 per cent of the growth in expenditure since the September quarter 2019. The increase in spend on organised tours and entertainment could reflect the holiday dollar campaigns that occurred in different regions in Queensland, namely Cairns holiday dollars (early March to 30 July 2021), Gold Coast Holiday Dollars (3 June – 4 October 2021) and Brisbane holiday dollars (27 April – 4 October 2021).

### Two speed recovery

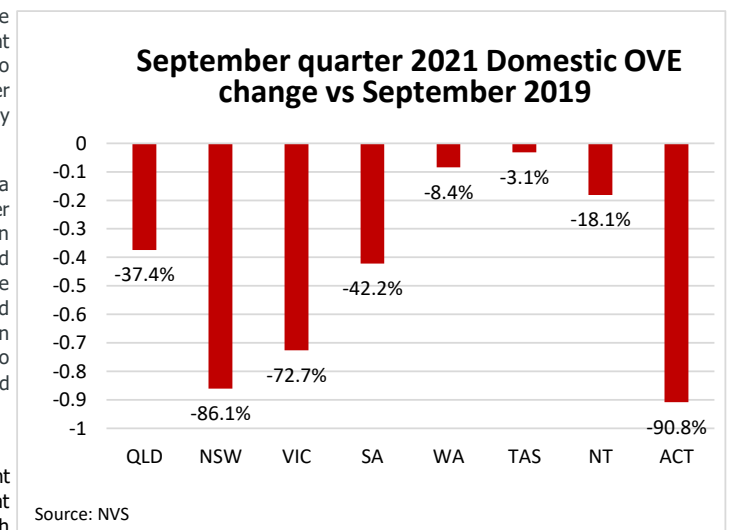
Total domestic OVE reached record levels in the Whitsundays (up 15.9 per cent on average annually over the past three years to \$926.9m), Southern Great Barrier Reef (up 6.8 per cent compared with 2019 to \$1.3b) and Tropical North Queensland (up 5.0 per cent compared to 2019 to \$2.6b). OVE also grew compared to 2019 in Southern Queensland Country (up 3.1 per cent to \$752.4m). OVE decreased compared to 2019 in all of the other regions which are analysed over this time frame.

## September quarter 2021 overnight visitors in Queensland

	Visitor Sep qtr 2021	Visitor Sep qtr 2019	Change vs Sep qtr 2019
<b>Total Queensland</b>	<b>4,241,000</b>	<b>6,613,000</b>	<b>-35.9%</b>
Holiday	1,787,000	2,598,000	-31.2%
VFR <sup>4</sup>	1,278,000	2,225,000	-42.6%
Business	977,000	1,578,000	-38.1%
<b>Overnight Visitor Expenditure</b>	<b>\$3,360.9m</b>	<b>\$5,368.9m</b>	<b>-37.4%</b>

## September Quarter 2021 Queensland Interstate vs Intrastate

	Visitors Sep wtr 2021	Visitor Sep qtr 2019	Change vs Sep qtr 2019
<b>Visitation</b>			
Interstate	410,000	2,234,000	-81.7%
Intrastate	3,831,000	4,379,000	-12.5%
<b>Overnight Visitor Expenditure</b>			
Interstate	\$871.4m	\$2,915.2m	-70.1%
Intrastate	\$2,489.6m	\$2,453.8m	1.5%



# Domestic Tourism Snapshot

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## Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
<b>Total Queensland</b>	<b>20,313,000</b>	<b>9.8%</b>	<b>-21.6%</b>	<b>8,725,000</b>	<b>27.3%</b>	<b>-12.8%</b>
Brisbane	5,443,000	1.0%	-33.4%	1,703,000	19.3%	-27.9%
Gold Coast	3,068,000	16.3%	-27.0%	1,684,000	31.0%	-22.2%
Sunshine Coast	3,601,000	13.0%	-11.1%	2,101,000	16.2%	-4.9%
SQC <sup>7</sup>	2,068,000	18.9%	-7.3%	689,000	54.5%	12.9%
SGBR <sup>8</sup>	2,111,000	16.8%	-8.9%	848,000	46.8%	15.3%
Townsville	1,039,000	26.3%	-19.9%	406,000	45.9%	0.6%
TNQ <sup>9</sup>	1,939,000	25.0%	-12.6%	1,069,000	40.2%	-7.0%

	Visitors <sup>1</sup>	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	699,000	-1.6%	344,000	-6.4%
Mackay	965,000	2.2%	230,000	4.4%
Outback	977,000	2.4%	304,000	-5.5%
Whitsundays	720,000	5.3%	487,000	7.6%

## Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
<b>Total Queensland</b>	<b>\$16,576.8m</b>	<b>27.8%</b>	<b>-14.7%</b>	<b>100%</b>	<b>\$816</b>
Brisbane	\$3,299.5m	2.4%	-38.7%	20%	\$606
Gold Coast	\$2,793.5m	22.8%	-24.3%	17%	\$911
Sunshine Coast	\$2,615.5m	26.6%	-4.7%	16%	\$726
SQC	\$752.4m	33.4%	3.1%	5%	\$364
SGBR	\$1,279.4m	39.4%	6.8%	8%	\$606
Townsville	\$720.7m	30.4%	-8.7%	4%	\$694
TNQ	\$2,632.3m	67.7%	5.0%	16%	\$1,357

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$421.5m	-0.6%	3%	\$603
Mackay	\$418.7m	-2.5%	3%	\$434
Outback	\$652.9m	-1.2%	4%	\$668
Whitsundays	\$926.9m	15.9%	6%	\$1,288

## June Quarter 2021 overnight visitors and nights, by region

	Visitor Sep qtr 2021	Visitor Sep qtr 2019	Change vs Sep qtr 2019	Nights Sep qtr 2021	Nights Sep qtr 2019	Change vs Sep qtr 2019
<b>Total Queensland</b>	<b>4,241,000</b>	<b>6,613,000</b>	<b>-35.9%</b>	<b>18,967,000</b>	<b>19,213,000</b>	<b>-33.9%</b>
Brisbane	999,000	2,102,000	-52.5%	2,845,000	5,814,000	-51.1%
Sunshine Coast	720,000	920,000	-21.8%	2,369,000	3,557,000	-33.4%
SQC	512,000	656,000	-22.0%	1,554,000	1,690,000	-8.0%
Gold Coast	452,000	1,019,000	-55.7%	1,485,000	4,400,000	-66.3%
SGBR	551,000	602,000	-8.5%	2,457,000	2,808,000	-12.5%
TNQ	495,000	707,000	-30.1%	3,047,000	4,012,000	-24.0%
Townsville	307,000	382,000	-19.6%	1,069,000	1,282,000	-16.6%

## Brisbane

Domestic OVE decreased by 38.7 per cent compared to the year ending December 2019 to \$3.3b on the back of visitation decreasing by 33.4 per cent to 5.4m visitors and spend per night decreasing by 8.5 per cent to \$208 per night in the year ending September 2021. The decline in visitation compared with 2019 was most pronounced for business visitors (down 49.3 per cent to 1.0m), followed by VFR visitation (down 30.9 per cent to 2.3m) and holiday visitation (down 27.9 per cent to 1.7m). Interstate visitation (down 58.6 per cent to 1.5m) experienced a larger decrease compared to 2019 than intrastate visitation (down 13.7 per cent to 4.0m). Visitation from Victoria was down 67.0 per cent to 288,000, visitation from Sydney was down 71.1 per cent to 314,000 and visitation from regional New South Wales was down 42.6 per cent to 535,000. Among intrastate markets, intraregional travel decreased 7.3 per cent to 1.3m, visitation from the Sunshine Coast decreased 25.8 per cent to 656,000, but visitation from the Gold Coast grew 17.3 per cent to 642,000. In the September quarter 2021 visitation was down 52.5 per cent compared to the pre-COVID September quarter 2019.

## Fraser Coast

Annual OVE was \$421.5m in the year ending September 2021, which is steady (down 0.6 per cent on average) over the past three years. Although visitation has decreased (down 1.6 per cent on average over the past three years to 699,000) this has been offset by an increase in spend per visitor (up 1.1 per cent on average over the past three years to \$603 per visitor). Holiday visitation (which makes up 49 per cent of visitors to the region) decreased by 6.4 per cent on average over the past three years to 344,000 and VFR (which accounts for 34 per cent of visitation) was steady (up 0.4 per cent on average over the past three years). Intrastate visitation increased by 4.6 per cent on average to 606,000, while interstate visitation was not publishable due to a small visitor survey sample size.

## Outback Queensland

Annual OVE in Outback Queensland decreased by 1.2 per cent on average over the past three years to \$652.9m, reflecting that the average length of stay decreased by 4.0 per cent on average and total nights decreased 1.5 per cent on average to 4.8 million. Business visitation was up 4.2 per cent on average to 417,000, while VFR visitation was steady (down 0.5 per cent on average) at 162,000 and holiday visitation was down 5.5 per cent on average to 304,000. Intrastate visitation accounts for 86 per cent of visitors to Outback Queensland and has increased by 7.4 per cent on average to 842,000. On the other hand, interstate visitation was down 17.9 per cent on average over the past three years to 136,000.

## Whitsundays

Annual OVE grew by 15.9 per cent on average over the past three years to a record \$926.9m on the back of 720,000 visitors (up 5.3 per cent on average over the past three years) and spend per visitor growing by 8.4 per cent on average over the period to \$1,288 per visitor. The increase in spend was mostly due to an increase in expenditure on accommodation, likely a result of resorts coming back online following Tropical Cyclone Debbie. Holiday visitation accounts for 68 per cent of domestic visitation to the region, and it grew by 7.6 per cent on average over the past three years to a record 487,000. Intrastate visitation increased by 15.5 per cent on average over the past three years to 581,000, while interstate visitation decreased by 14.9 per cent on average over the past three years to 139,000.

## Tropical North Queensland (TNQ)

Domestic visitation decreased by 12.6 per cent compared to 2019 to 1.9m, but OVE grew by 5.0 per cent over the same time period to a record \$2.6b. This was on the back of spend per night growing by 14.7 per cent to \$257 per night. In particular, the region saw a significant increase in spend on accommodation, which in part is due to a change in accommodation composition with the number of nights in rented houses/apartments increasing from 12.9 per cent to 18.4 per cent, while the share of nights in caravan or camping accommodation decreased from 14.4 per cent to 10.8 per cent. There was also a large increase in spend on food and drink. Holidays account for 55 per cent of visitors, and this market held up better than the others. Holiday visitation was down 7.0 per cent to 1.1m, while VFR visitation was down 30.6 per cent compared with 2019 to 374,000 and business visitation decreased 17.4 per cent to 391,000. The decrease in visitation was mostly due to the interstate market, which was down by 31.9 per cent compared with 2019 to 488,000. This included a 49.8 per cent reduction in visitation from Victoria to 162,000 and a 28.5 per cent reduction in visitation from NSW to 206,000. Total intrastate visitation was down 3.3 per cent compared to 2019 to 1.5m. The largest intrastate market is intraregional travel which was down 10.7 per cent to 659,000. In the September quarter 2021, visitation to TNQ was down by 30.1 per cent compared to the September quarter 2019.

## Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
<b>Total intrastate</b>	<b>16,381,000</b>	<b>12.3%</b>	<b>-7.9%</b>
Brisbane	3,957,000	7.0%	-13.7%
Gold Coast	1,921,000	26.1%	-5.2%
Sunshine Coast	2,977,000	15.5%	1.5%
SQC	1,812,000	17.8%	1.0%
SGBR	1,926,000	15.9%	-4.7%
Townsville	911,000	20.1%	-14.4%
TNQ	1,451,000	16.8%	-3.3%

	Visitors	3-yr trend
Fraser Coast	606,000	1.8%
Mackay	881,000	3.7%
Outback	842,000	7.4%
Whitsundays	581,000	15.5%

## Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
<b>Total interstate</b>	<b>3,932,000</b>	<b>0.6%</b>	<b>-51.6%</b>
Brisbane	1,486,000	-12.1%	-58.6%
Gold Coast	1,147,000	2.9%	-47.3%
Sunshine Coast	624,000	2.7%	-44.1%
SQC	256,000	27.4%	-41.3%
SGBR	185,000	27.3%	-37.2%
Townsville	127,000	101.1%	-45.2%
TNQ	488,000	57.9%	-31.9%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	np	np
Outback	136,000	-17.9%
Whitsundays	139,000	-14.9%



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## Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
<b>Total Queensland</b>	<b>20,313,000</b>	<b>9.8%</b>	<b>-21.6%</b>	<b>8,725,000</b>	<b>27.3%</b>	<b>-12.8%</b>
Brisbane	5,443,000	1.0%	-33.4%	1,703,000	19.3%	-27.9%
Gold Coast	3,068,000	16.3%	-27.0%	1,684,000	31.0%	-22.2%
Sunshine Coast	3,601,000	13.0%	-11.1%	2,101,000	16.2%	-4.9%
SQC <sup>c</sup>	2,068,000	18.9%	-7.3%	689,000	54.5%	12.9%
SGBR <sup>8</sup>	2,111,000	16.8%	-8.9%	848,000	46.8%	15.3%
Townsville	1,039,000	26.3%	-19.9%	406,000	45.9%	0.6%
TNQ <sup>9</sup>	1,939,000	25.0%	-12.6%	1,069,000	40.2%	-7.0%

	Visitors	3-yr trend <sup>10</sup>	Holiday visitors	3-yr trend
Fraser Coast	699,000	-1.6%	344,000	-6.4%
Mackay	965,000	2.2%	230,000	4.4%
Outback	977,000	2.4%	304,000	-5.5%
Whitsundays	720,000	5.3%	487,000	7.6%

## Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
<b>Total Queensland</b>	<b>\$16,576.8m</b>	<b>27.8%</b>	<b>-14.7%</b>	<b>100%</b>	<b>\$816</b>
Brisbane	\$3,299.5m	2.4%	-38.7%	20%	\$606
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	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$421.5m	-0.6%	3%	\$603
Mackay	\$418.7m	-2.5%	3%	\$434
Outback	\$652.9m	-1.2%	4%	\$668
Whitsundays	\$926.9m	15.9%	6%	\$1,288

## June Quarter 2021 overnight visitors and nights, by region

	Visitors	Visitor Sep qtr 2019	Change vs Sep qtr 2019	Nights	Visitor Sep qtr 2019	Change vs Sep qtr 2019
<b>Total Queensland</b>	<b>4,241,000</b>	<b>6,613,000</b>	<b>-35.9%</b>	<b>18,967,000</b>	<b>19,213,000</b>	<b>-33.9%</b>
Brisbane	999,000	2,102,000	-52.5%	2,845,000	5,814,000	-51.1%
Sunshine Coast	720,000	920,000	-21.8%	2,369,000	3,557,000	-33.4%
SQC	512,000	656,000	-22.0%	1,554,000	1,690,000	-8.0%
Gold Coast	452,000	1,019,000	-55.7%	1,485,000	4,400,000	-66.3%
SGBR	551,000	602,000	-8.5%	2,457,000	2,808,000	-12.5%
TNQ	495,000	707,000	-30.1%	3,047,000	4,012,000	-24.0%
Townsville	307,000	382,000	-19.6%	1,069,000	1,282,000	-16.6%

### Sunshine Coast

Sunshine Coast's domestic OVE decreased 4.7 per cent compared with the year ending December 2019 to \$2.6b on the back of visitation decreasing 11.1 per cent to 3.6 million. The Sunshine Coast welcomed 2.1m holiday visitors (down 4.9 per cent from 2019), 1.1 VFR visitors (down 18.0 per cent) and 206,000 business visitors (down 42.9 per cent). The decrease in visitation to the Sunshine Coast is due to the interstate market which decreased by 44.1 per cent compared with 2019 to 624,000. This included a 52.7 per cent decrease in visitation from New South Wales to 269,000 and a 39.8 per cent decrease in visitation from Victoria to 236,000. Intrastate visitation was up 1.5 per cent compared to 2019 with 3.0m visitors. Visitation from the Sunshine Coast's largest market, Brisbane, increased 10.2 per cent compared to 2019 to 1.9m. In the September quarter 2021, visitation to the Sunshine Coast was down 21.8 per cent compared to the September quarter 2019.

### Gold Coast

OVE in the year ending September 2021 decreased by 24.3 per cent compared with the year ending December 2019 to \$2.8b on the back of visitation decreasing by 27.0 per cent to 3.1m. The decrease in visitation was most pronounced among business visitors (down 41.3 per cent compared with 2019 to 294,000), followed by VFR visitors (down 29.1 per cent to 991,000) and holiday visitors (down 22.2 per cent to 1.7m). The decrease in visitation was largely due to interstate visitation, which decreased 47.3 per cent compared with 2019 to 1.1m. This included a 56.1 per cent reduction in visitation from Sydney to 305,000, a 54.2 per cent reduction of visitors from Victoria to 292,000 and a 31.8 per cent reduction in visitation from regional New South Wales to 380,000. Intrastate visitation was down 5.2 per cent compared to 2019, with visitation from Brisbane down 6.3 per cent to 1.3m visitors. Visitation in the September quarter 2021 was 55.7 per cent lower than the September quarter 2019.

### Southern Queensland Country (SQC)

OVE grew by 3.1 per cent since 2019 to \$752.4m. Although visitation was down 7.3 per cent to 2.1m, this was more than offset by a 13.1 per cent increase in average length of stay to 3.0 nights, which lead total nights to increase by 4.9 per cent to 6.2m. Holiday visitation grew by 12.9 per cent since 2019 to a record 689,000, while VFR visitation (down 22.6 per cent to 727,000) and business visitation (down 10.7 per cent to 477,000) both decreased. The decrease in visitation was due to the interstate market which was down 41.3 per cent to 256,000, including a 34.1 per cent decrease in visitation from New South Wales to 175,000. Intrastate visitation was 1.0 per cent higher than 2019 at 1.8m, including a record 628,000 holiday visitors (up 10.9 per cent). Brisbane visitation was stable (down 0.7 per cent) compared with 2019 at 835,000, intraregional travel was 18.4 per cent lower compared with 2019 at 353,000. Visitation in the September quarter 2021 was 22.0 per cent lower than visitation in the September quarter 2019.

### Southern Great Barrier Reef (SGBR)

OVE grew by 6.8 per cent compared to the year ending December 2019 to a record \$1.3 billion. This was despite visitation decreasing 8.9 per cent compared with 2019 to 2.1m since the total spend per night increased 19.4 per cent to \$158 per night. The increase in spend per night is due to an increase in spending on both accommodation and food and drink. A record 848,000 holiday visitors were welcomed to the region (up 15.3 per cent compared to 2019), while VFR (down 14.1 per cent to 595,000) and business visitation (down 30.8 per cent to 518,000) both decreased. Intrastate visitation decreased by 4.7 per cent to 1.9m, although there was a record 781,000 intrastate holiday visitors (up 30.7 per cent). SGBR welcomed a record number of visitors from both Brisbane (up 3.3 per cent to 652,000) and the Sunshine Coast (up 40.5 per cent to 217,000). Interstate visitation was down 37.2 per cent compared with 2019 to 185,000. Visitation in the September quarter 2021 was 8.5 per cent lower than visitation in the September quarter 2019.

### Townsville

OVE decreased 8.7 per cent from 2019 to \$720.7m, reflecting a 19.9 per cent decrease in visitation to 1.0m. The decrease in visitation was due to business (down 32.5 per cent to 254,000) and VFR visitation (down 21.8 per cent to 310,000), while holiday visitation was steady (up 0.6 per cent) at 406,000. Interstate visitation was down 45.2 per cent compared with 2019 to 127,000, while intrastate visitation was down 14.4 per cent to 911,000. This included a record 352,000 intrastate holiday visitors (up 17.5 per cent compared to 2019) which included the benefits of Supercars in the month of July and NRL finals in the month of September. In the September quarter 2021, visitation to Townsville was down 19.6 per cent compared to the September quarter 2019.

### Mackay

Annual OVE totalled \$418.7m in Mackay, which was down 2.5 per cent on average, even as visitation grew by 2.2 per cent on average over the past three years to 965,000. The average length of stay decreased by 6.3 per cent on average to 3.7 nights, so that total nights decreased 3.7 per cent on average to 3.6m. Holiday visitation grew by 4.4 per cent on average over the past three years to 230,000 and business visitation was up by 3.3 per cent on average to 504,000, while VFR visitation was down 7.6 per cent on average to 149,000. The region's visitation is predominantly from the intrastate market (91 per cent of trips), which grew on average by 3.7 per cent over the past three years to 881,000 visitors.

## Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
<b>Total intrastate</b>	<b>16,381,000</b>	<b>12.3%</b>	<b>-7.9%</b>
Brisbane	3,957,000	7.0%	-13.7%
Gold Coast	1,921,000	26.1%	-5.2%
Sunshine Coast	2,977,000	15.5%	1.5%
SQC	1,812,000	17.8%	1.0%
SGBR	1,926,000	15.9%	-4.7%
Townsville	911,000	20.1%	-14.4%
TNQ	1,451,000	16.8%	-3.3%

	Visitors	3-yr trend
Fraser Coast	606,000	1.8%
Mackay	881,000	3.7%
Outback	842,000	7.4%
Whitsundays	581,000	15.5%

## Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
<b>Total interstate</b>	<b>3,932,000</b>	<b>0.6%</b>	<b>-51.6%</b>
Brisbane	1,486,000	-12.1%	-58.6%
Gold Coast	1,147,000	2.9%	-47.3%
Sunshine Coast	624,000	2.7%	-44.1%
SQC	256,000	27.4%	-41.3%
SGBR	185,000	27.3%	-37.2%
Townsville	127,000	101.1%	-45.2%
TNQ	488,000	57.9%	-31.9%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	np	np
Outback	136,000	-17.9%
Whitsundays	139,000	-14.9%



# Domestic Tourism Snapshot

Year ending September 2021



## State expenditure comparison

	Expenditure	Annual change	Change vs YE Dec 2019	Share of expenditure	Spend per visitor
<b>Total Australia</b>	<b>\$60,946.9m</b>	<b>17.5%</b>	<b>-24.5%</b>	<b>100.0%</b>	<b>\$737</b>
Queensland	\$16,576.8m	27.8%	-14.7%	27.2%	\$816
New South Wales	\$17,067.8m	11.8%	-27.9%	28.0%	\$663
Victoria	\$9,465.7m	-2.5%	-44.2%	15.5%	\$546
Other States	\$17,836.6m	27.9%	-13.4%	29.3%	\$832

## State visitation comparison

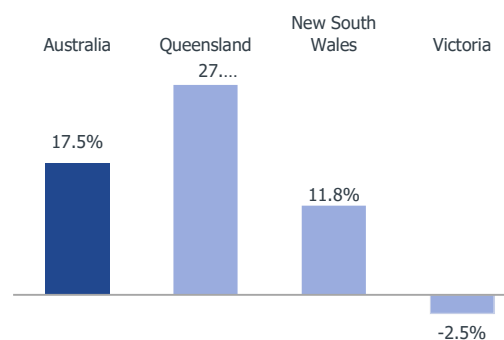
	Visitors	Annual Change	Change vs YE Dec 2019	Avg stay	Annual # change
<b>Total Australia</b>	<b>82,685,000</b>	<b>3.0%</b>	<b>-29.6%</b>	<b>3.9</b>	<b>0.2</b>
Queensland	20,313,000	9.8%	-21.6%	4.1	0.1
New South Wales	25,750,000	-3.4%	-33.9%	3.6	0.2
Victoria	17,334,000	0.5%	-41.7%	3.2	0.1
Other States	21,445,000	6.6%	-19.9%	4.4	0.2

<b>Total holiday</b>	<b>37,460,000</b>	<b>21.6%</b>	<b>-19.0%</b>	<b>4.0</b>	<b>0.2</b>
Queensland	8,725,000	27.3%	-12.8%	4.5	0.5
New South Wales	11,290,000	14.2%	-23.7%	3.6	0.2
Victoria	8,192,000	17.4%	-34.2%	3.3	0.0
Other States	10,027,000	26.7%	-5.1%	4.2	0.3

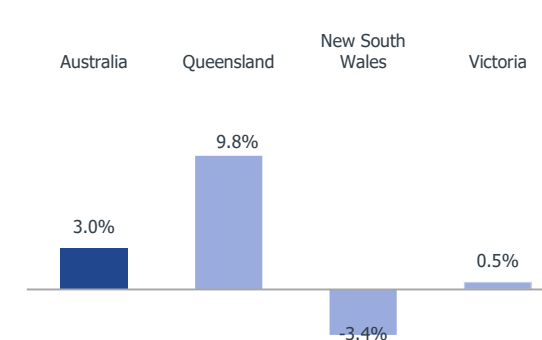
<b>Total VFR</b>	<b>27,115,000</b>	<b>-2.0%</b>	<b>-32.1%</b>	<b>3.4</b>	<b>0.2</b>
Queensland	6,698,000	3.7%	-25.1%	3.5	0.0
New South Wales	8,849,000	-9.7%	-37.1%	3.3	0.3
Victoria	6,107,000	1.9%	-40.6%	3.0	0.0
Other States	5,858,000	1.1%	-20.2%	3.8	0.1

<b>Total Business</b>	<b>14,560,000</b>	<b>-19.7%</b>	<b>-46.2%</b>	<b>4.1</b>	<b>0.2</b>
Queensland	4,001,000	-4.5%	-34.7%	3.9	-0.2
New South Wales	4,301,000	-22.2%	-48.4%	3.4	0.2
Victoria	2,096,000	-39.6%	-63.9%	3.0	0.2
Other States	4,606,000	-14.9%	-38.8%	5.2	0.3

Annual change in visitor expenditure by state, Year ending September 2021



Annual change in visitation by state, Year ending September 2021



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 transitioned to 100 per cent mobile phone interviewing, after previously doing 50 per cent of the sample from landlines. 97 per cent 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](http://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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