

Domestic Tourism Snapshot

Year ending March 2020

Domestic overnight visitors within Australia

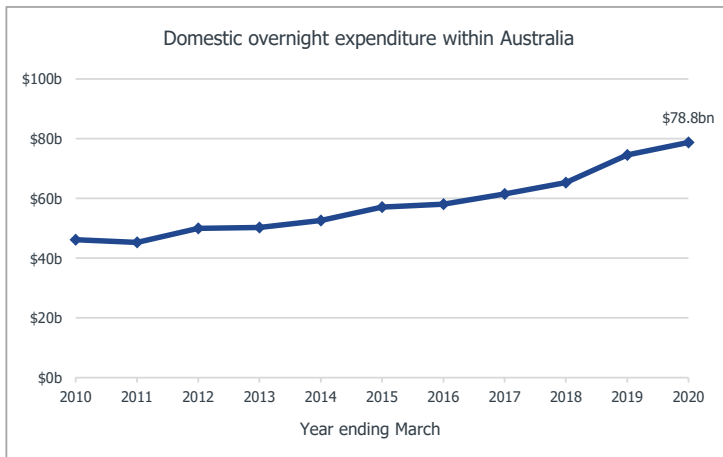
	Visitors	Annual ¹ change	Avg stay ²	Annual # change
Total Australia³	112,285,000	3.0%	3.6	0.1
Holiday	43,537,000	-0.4%	3.8	0.0
VFR ⁴	38,277,000	3.8%	3.2	0.0
Business	26,209,000	6.8%	3.5	0.2

Intrastate	77,850,000	3.2%	2.9	0.0
Holiday	31,990,000	-0.4%	3.0	0.0
VFR ⁴	27,254,000	4.2%	2.4	-0.1
Business	14,381,000	8.5%	3.5	0.2

Interstate	36,678,000	2.9%	4.8	0.2
Holiday	12,522,000	0.2%	5.6	0.2
VFR ⁴	11,409,000	3.5%	4.9	0.1
Business	12,111,000	4.4%	3.5	0.3

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual ⁵ change
Total Australia⁵	\$78,752.0m	5.6%
Holiday ⁶	\$32,985.5m	5.8%
VFR ⁶	\$12,317.9m	4.7%
Business ⁶	\$14,627.0m	6.5%



A total of 112.3 million domestic trips were taken in Australia in the year ending March 2020, an increase of 3.0% over the year. These trips generated \$78.8b in expenditure, up by 5.6% annually. Nationally, business Overnight Visitor Expenditure (OVE) grew the fastest (up 6.5% to \$14.6b), holiday expenditure grew by 5.8% to \$33.0b and Visiting Friends and Relatives (VFR) expenditure grew by 4.7% to \$12.3b. While business (up 6.8% to 26.2m) and VFR (up 3.8% to 38.3m) visitation grew over the year, holiday visitation was steady (down 0.4% to 43.5m).

At the state level, growth in domestic OVE in Queensland was a little slower than other states. OVE grew by 2.5% over the year in Queensland compared to 5.6% for the nation on average. In part this was due to increased business travel elsewhere in Australia related to recovery work.

However, Queensland gained market share in the holiday market (up 0.6% to 26.8%) growing 8.1% compared to the national average of 5.8%. Interstate (up 2.9% to 36.7m) and intrastate (up 3.2% to 77.9m) visitation growth was comparable, but interstate expenditure (up 7.3% to \$36.6b) grew faster than intrastate expenditure (up 4.3% to \$42.2b).

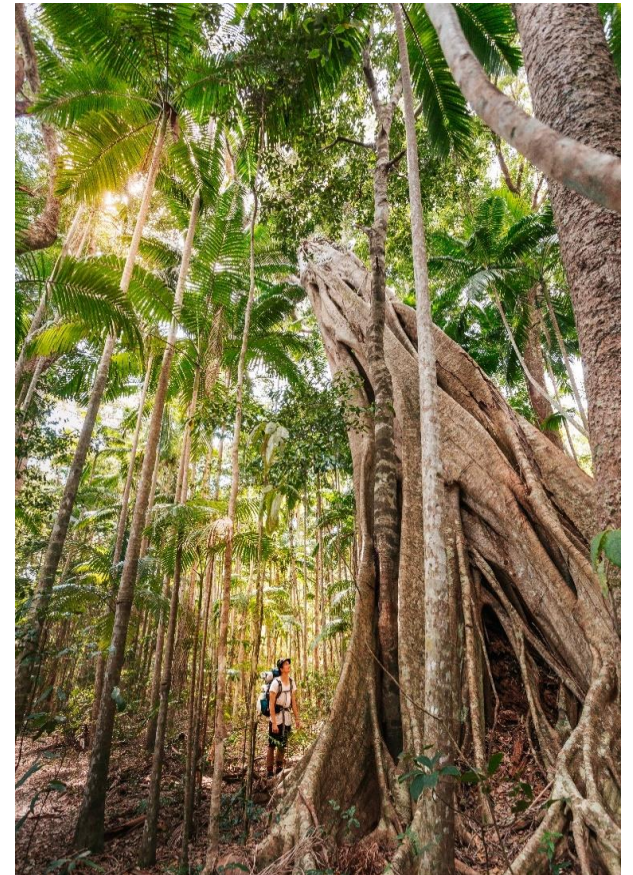
Holiday most affected by bushfires and COVID-19

The most recent quarter (March 2020) was affected by both the 'black summer' bushfires and the initial concerns and social distancing requirements related to COVID-19. As a result, in the March quarter 2020, visitation was down 17.5% compared to the same quarter in March 2019.

During the March quarter 2020, holiday visitation was most affected by COVID-19 and the 'black summer' bushfires, decreasing by 20.9% in Australia compared to the March quarter 2019. In comparison VFR visitation decreased by 16.9% and business visitation decreased by 14.3%.

March Quarter 2020 overnight visitors in Australia

	Visitors	Growth vs Mar qtr 2019
Total Australia	24,321,000	-17.5%
Holiday	10,157,000	-20.9%
VFR ⁴	8,179,000	-16.9%
Business	4,986,000	-14.3%



Domestic Tourism Snapshot

Year ending March 2020

Domestic overnight visitors in Queensland

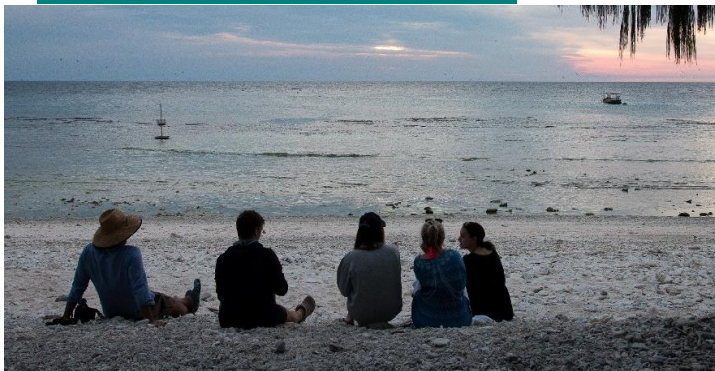
	Visitors	Annual change	Avg stay	Annual # change
Total Queensland	24,809,000	0.9%	4.0	0.0
Holiday	9,550,000	0.2%	4.3	-0.1
VFR	8,622,000	5.7%	3.5	0.1
Business	5,783,000	-0.7%	3.7	0.1

Intrastate	17,119,000	-0.1%	3.2	0.0
Holiday	6,359,000	-1.6%	3.1	-0.1
VFR	6,181,000	4.5%	2.7	0.1
Business	3,790,000	-1.3%	4.0	0.2

Interstate	7,690,000	3.3%	5.6	-0.1
Holiday	3,192,000	4.1%	6.8	-0.2
VFR	2,441,000	8.9%	5.5	0.2
Business	1,993,000	0.3%	3.1	-0.1

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change
Total Queensland ⁵	\$18,934.7m	2.5%
Holiday ⁶	\$8,830.4m	8.1%
VFR ⁶	\$2,867.1m	4.8%
Business ⁶	\$2,972.4m	-7.8%



In Queensland, domestic OVE grew by 2.5% to \$18.9b, even as visitation was steady (up 0.9%) at 24.8m, because spend per visitor grew by 1.6% to \$763 per visitor. In the March quarter 2020, visitation in Queensland was down 18.4% compared to the previous year as domestic travel was affected by the bushfires and COVID-19.

Record holiday spend for Queensland before the crisis

Despite the events of the March quarter, Queensland's holiday OVE reached a new record of \$8.8b (up 8.1%), even as holiday visitation was steady (up 0.2) at 9.6m. Business OVE decreased by 7.8% to \$3.0b as visitation was steady (down 0.7%) at 5.8m, while both VFR OVE (up 4.8% to \$2.9b) and visitation (5.7% to 8.6m) grew.

Domestic holiday growth came largely from the interstate market, with interstate expenditure up 5.7% to \$9.0b and interstate visitation up 3.3% to 7.7m. In comparison both intrastate expenditure (down 0.2% to \$10.0b) and visitation (down 0.1% to 17.1m) were steady.

Looking at the most recent quarter (March 2020), domestic visitation to Queensland decreased across all trip purposes. Business travel decreased the most in Queensland during the March quarter 2020 compared to the previous year (down 24.6%), followed by holiday (down 19.6%) and VFR (down 15.7%).

Regional results

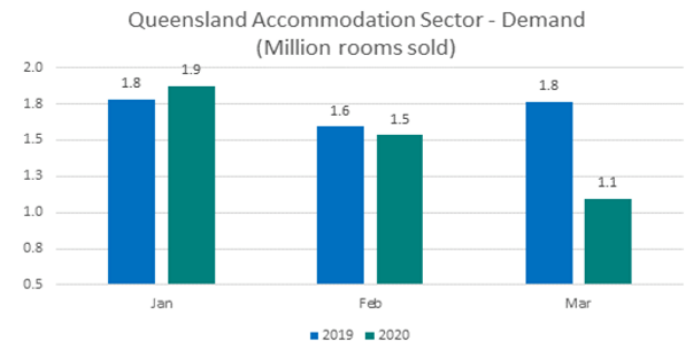
As a result of the sharp decline in travel during the March quarter, only Mackay reached a record level of visitation (1.1m) and only Tropical North Queensland reached a record level of OVE. Over the year, visitation grew in five of Queensland's tourism regions and was steady in two others and OVE grew in five regions and was steady in one other.

March Quarter 2020 overnight visitors in Queensland

	Visitors	Growth vs Mar qtr 2019
Total Queensland	4,901,000	-18.4%
Holiday	1,733,000	-15.7%
VFR ⁴	1,055,000	-24.6%
Business	1,055,000	-18.4%



Source: STR



Source: STR

Domestic Tourism Snapshot

Year ending March 2020

Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	24,809,000	0.9%	9,550,000	0.2%
Brisbane	7,942,000	4.2%	2,222,000	2.5%
Gold Coast	3,923,000	-2.0%	2,034,000	-4.7%
Sunshine Coast	3,819,000	-0.9%	2,051,000	-2.6%
SQC ⁷	2,126,000	-3.0%	633,000	10.2%
SGBR ⁸	2,258,000	1.8%	755,000	2.9%
Townsville	1,226,000	-14.1%	397,000	-17.0%
TNQ ⁹	2,183,000	8.1%	1,174,000	17.0%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	744,000	7.5%	362,000	6.7%
Mackay	1,099,000	8.3%	226,000	8.1%
Outback	1,057,000	4.1%	304,000	-1.4%
Whitsundays	624,000	8.9%	373,000	6.1%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$18,934.7m	2.5%	100%	\$763
Brisbane	\$5,041.6m	5.9%	26.6%	\$635
Gold Coast	\$3,610.5m	0.3%	19.1%	\$920
Sunshine Coast	\$2,694.1m	6.0%	14.2%	\$705
SQC	\$735.6m	-11.2%	3.9%	\$346
SGBR	\$1,146.0m	-1.3%	6.1%	\$508
Townsville	\$782.2m	-12.6%	4.1%	\$638
TNQ	\$2,566.9m	13.2%	13.6%	\$1,176

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$427.2m	12.4%	2.3%	\$574
Mackay	\$508.0m	10.1%	2.7%	\$462
Outback	\$682.9m	7.7%	3.6%	\$646
Whitsundays	\$605.2m	3.9%	3.2%	\$971

Brisbane

Domestic visitor expenditure grew by 5.9% to \$5.0b on the back of visitation growing by 4.2% to 7.9m visitors. Annual growth in visitation was driven by VFR travel, which increased by 12.7% to 3.3m and holiday visitation also grew by 2.5% to 2.2m, while business visitation was steady (down 0.2%) at 1.9m. Interstate visitation grew by 7.5% to 3.4m. The largest interstate markets for Brisbane are Sydney (up 11.6% to 1.0m), regional New South Wales (steady, down 0.4% 855,000) and Melbourne (up 12.0% to 620,000). Intrastate visitation grew by 1.8% to 4.6m, with the largest intrastate markets being Brisbane residents travelling within the region (up 6.5% to a record 1.5m) and the Sunshine Coast (up 19.3% to 861,000). Growth over the year was weighed down by the March quarter 2020, with visitation in the quarter down 17.5% compared to a year earlier.

Gold Coast

Visitor expenditure was steady (up 0.3%) at \$3.6b even as visitation decreased by 2.0% to 3.9m as visitors increased their average spend by 2.3% to \$920 per visitor. The decrease in visitation to the Gold Coast was due to business (down 18.6% to 459,000) and holiday travel (down 4.7% to 2.0m), while VFR visitation continued to grow (up 12.7% to 1.3m). Intrastate visitation decreased by 5.3% to 1.8m, led by an 8.4% decrease in visitation from Brisbane (down 8.4% to 1.3m). Interstate visitation grew by 1.1% over the year to 2.1m. Growth from Sydney (up 4.7% to 665,000) and Melbourne (up 4.1% to 413,000) offset a decrease of visitation from regional New South Wales (down 8.4% to 548,000). The decrease in visitation largely reflects the March quarter 2020, with visitation in the quarter down 27.1% compared to a year earlier.

Fraser Coast

Annual visitor expenditure grew by 12.4% on average over the past three years to \$427.2m. This reflected visitation growth of 7.5% on average over the same period, to reach 744,000 visitors, as well as a 5.1% average annual increase in spend per visitor. The holiday market grew by 6.7% on average to 362,000 and VFR grew by 6.7% on average over the past three years to 257,000. Intrastate visitation grew by 6.2% on average over the past three years to 561,000, while interstate visitation grew by 11.7% on average to 183,000.

Sunshine Coast

Sunshine Coast's OVE grew by 6.0% to \$2.7b, even as visitation was steady (down 0.9%) at 3.8m since the average length of stay grew by 0.3 nights to 3.8 nights, so that total visitor nights grew by 7.0% to 14.4m. While VFR visitation grew by 5.2% to 1.4m, this was offset by decreased business (down 16.4% to 303,000) and holiday (down 2.6% to 2.1m) visitation. Interstate visitation grew by 15.7% to a 1.1m on the back of growth from New South Wales (up 18.4% to 526,000) and Victoria (up 17.3% to 415,000). Intrastate visitation decreased by 6.3% to 2.7m, largely due to visitation from Brisbane decreasing by 12.0% to 1.7m. Visitation was weighed down by the March quarter 2020, with visitation in the quarter down 21.6% compared to a year earlier.

Whitsundays

Annual visitor expenditure increased by 3.9% on average over the past three years to \$605.2m on the back of visitation which grew by 8.9% on average over the same period to 624,000. Holiday visitation accounts for 60% of Whitsundays' domestic market, growing by 6.1% on average over the past three years to 373,000. The intrastate market (up 15.2% on average over three years to 405,000) drove growth, as interstate visitation was steady (down 0.7%) on average over the past three years to 219,000.

Tropical North Queensland (TNQ)

OVE grew by 13.2% to a record \$2.6bn on the back of visitation growing by 8.1% to 2.2m and spend per visitor growing by 4.7% to \$1,176 per visitor. Visitation growth was led by holidaymakers (up 17.0% to a record 1.2m), while VFR was steady (down 0.4%) at 504,000 and business visitation decreased slightly (down 1.4% to 447,000). Intrastate visitation grew by 7.6% to 1.4m, with visitation increasing from within the Tropical North Queensland region (up 5.7% to 690,000), Brisbane (up 7.8% to 272,000) and Townsville (up 38.1% to 264,000). Interstate visitation grew by 9.2% to 750,000 on the back of visitation from New South Wales growing 24.7% to a record 332,000 and visitation from Victoria growing 7.3% to 318,000. Visitation grew over the year despite being weighed down by the March quarter, with visitation in the quarter down 8.9% compared to a year earlier.

Intrastate visitation

	Visitors	Annual change
Total intrastate	17,119,000	-0.1%
Brisbane	4,592,000	1.8%
Gold Coast	1,836,000	-5.3%
Sunshine Coast	2,727,000	-6.3%
SQC	1,719,000	-4.8%
SGBR	1,989,000	3.8%
Townsville	1,018,000	-10.4%
TNQ	1,433,000	7.6%

	Visitors	3-yr trend
Fraser Coast	561,000	6.2%
Mackay	968,000	8.4%
Outback	856,000	5.5%
Whitsundays	405,000	15.2%

Interstate visitation

	Visitors	Annual change
Total interstate	7,690,000	3.3%
Brisbane	3,350,000	7.5%
Gold Coast	2,087,000	1.1%
Sunshine Coast	1,092,000	15.7%
SQC	407,000	5.2%
SGBR	269,000	-11.1%
Townsville	208,000	-28.4%
TNQ	750,000	9.2%

	Visitors	3-yr trend
Fraser Coast	183,000	11.7%
Mackay	131,000	7.6%
Outback	200,000	-0.7%
Whitsundays	219,000	-0.7%

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Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	24,809,000	0.9%	9,550,000	0.2%
Brisbane	7,942,000	4.2%	2,222,000	2.5%
Gold Coast	3,923,000	-2.0%	2,034,000	-4.7%
Sunshine Coast	3,819,000	-0.9%	2,051,000	-2.6%
SQC ⁷	2,126,000	-3.0%	633,000	10.2%
SGBR ⁸	2,258,000	1.8%	755,000	2.9%
Townsville	1,226,000	-14.1%	397,000	-17.0%
TNQ ⁹	2,183,000	8.1%	1,174,000	17.0%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	744,000	7.5%	362,000	6.7%
Mackay	1,099,000	8.3%	226,000	8.1%
Outback	1,057,000	4.1%	304,000	-1.4%
Whitsundays	624,000	8.9%	373,000	6.1%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$18,934.7m	2.5%	100%	\$763
Brisbane	\$5,041.6m	5.9%	26.6%	\$635
Gold Coast	\$3,610.5m	0.3%	19.1%	\$920
Sunshine Coast	\$2,694.1m	6.0%	14.2%	\$705
SQC	\$735.6m	-11.2%	3.9%	\$346
SGBR	\$1,146.0m	-1.3%	6.1%	\$508
Townsville	\$782.2m	-12.6%	4.1%	\$638
TNQ	\$2,566.9m	13.2%	13.6%	\$1,176

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$427.2m	12.4%	2.3%	\$574
Mackay	\$508.0m	10.1%	2.7%	\$462
Outback	\$682.9m	7.7%	3.6%	\$646
Whitsundays	\$605.2m	3.9%	3.2%	\$971

Townsville

OVE decreased 12.6% to \$782.2m, reflecting a 14.1% decline in visitation (to 1.2m). The decrease in visitation occurred across purposes of visit, including business (down 20.2% to 336,000), holiday (down 17.0% to 397,000) and VFR (down 11.2% to 369,000). Part of the decline in business travel is due to recovery work from the March quarter 2019. Overall, the decrease in visitation was particularly pronounced for interstate visitors, down 28.4% to 208,000. Intrastate visitation decreased by 10.4%, including a 24.2% decrease in visitation from Tropical North Queensland, while intraregional travel was steady (down 0.9%) at 369,000, and visitation from Brisbane grew 11.1% to 178,000. The decrease in visitation over the year largely reflects the March quarter 2020, with visitation in the quarter down 23.6% compared to the same period a year earlier.

Southern Great Barrier Reef (SGBR)

OVE decreased 1.3% to \$1.1b even as visitation grew by 1.8% to 2.3m visitors. Annual growth in visitation was driven by VFR (up 13.7% to 669,000 visitors) and holiday (up 2.9% to a record 755,000) markets, while business visitation remained steady (down 0.7%) at 706,000. The increase in visitation was due to the intrastate market which grew by 3.8% to 2.0m. The largest two intrastate markets are intraregional travel (steady, down 0.6% to 634,000) and Brisbane (up 13.5% to 620,000). Interstate visitation decreased 11.1% to 269,000, on the back of a 23.5% decrease of visitation from New South Wales to 120,000. Visitation growth over the year was weighed down by the March quarter 2020, with visitation in the quarter down 10.7% compared to a year earlier.

Southern Queensland Country (SQC)

OVE decreased by 11.2% to \$735.6m reflecting a 3.0% decrease in visitation to 2.1m and an 8.5% reduction in spend per visitor to \$346 per visitor. The decrease in visitation over the year was due to business (down 7.8% to 506,000) and VFR (down 7.2% to 840,000) visitation while holiday travel grew (up 10.2% to 633,000). The intrastate market was responsible for the decrease in visitation, decreasing by 4.8% over the year to 1.7m. The largest intrastate markets are Brisbane (down 3.5% to 851,000) and intraregional travel (up 3.3% to 386,000). Interstate visitation grew by 5.2% to 407,000. Visitation growth over the year reflects decreased visitation in the March quarter 2020, with visitation in the quarter down 14.8% compared to a year earlier.

Mackay

Annual OVE in Mackay grew by 10.1% on average over the three years to March 2020 to \$508.0m, reflecting annual visitation which grew by 8.3% over the same period to a record 1.1m. Business travellers drove the growth in visitation up by 12.9% over the past three years to 604,000 and accounting for 55% of visitation. The region's visitation is predominantly from the intrastate market, growing by 8.4% on average over the past three years to 968,000 visitors. Interstate travel grew by 7.6% on average over the same period to 131,000 visitors.

Outback

OVE in the Outback grew by 7.7% on average over the three years to March 2020 to \$682.9m. This was due to increases in both visitation (up 4.1% on average over the same period to 1.1m) and average length of stay (up 14.6% on average to 5.5 nights). Growth in visitation was due to business travel, which makes up 53% of the Outback market. Business visitation grew by 15.3% on average over the past three years to 560,000, while holiday (down 1.4% on average to 304,000) and VFR (down 6.4% on average to 157,000) both decreased. Intrastate visitation grew by 5.5% on average over the past three years to 856,000, while the interstate market remained steady (down 0.7%) on average over the same period at 200,000.

Intrastate visitation

	Visitors	Annual change
Total intrastate	17,119,000	-0.1%
Brisbane	4,592,000	1.8%
Gold Coast	1,836,000	-5.3%
Sunshine Coast	2,727,000	-6.3%
SQC	1,719,000	-4.8%
SGBR	1,989,000	3.8%
Townsville	1,018,000	-10.4%
TNQ	1,433,000	7.6%

	Visitors	3-yr trend
Fraser Coast	561,000	6.2%
Mackay	968,000	8.4%
Outback	856,000	5.5%
Whitsundays	405,000	15.2%

Interstate visitation

	Visitors	Annual change
Total interstate	7,690,000	3.3%
Brisbane	3,350,000	7.5%
Gold Coast	2,087,000	1.1%
Sunshine Coast	1,092,000	15.7%
SQC	407,000	5.2%
SGBR	269,000	-11.1%
Townsville	208,000	-28.4%
TNQ	750,000	9.2%

	Visitors	3-yr trend
Fraser Coast	183,000	11.7%
Mackay	131,000	7.6%
Outback	200,000	-0.7%
Whitsundays	219,000	-0.7%



Domestic Tourism Snapshot

Year ending March 2020



State expenditure comparison

	Expenditure	Annual change	Share of expenditure	Spend per visitor
Total Australia	\$78,752.0m	5.6%	100.0%	\$701
Queensland	\$18,934.7m	2.5%	24.0%	\$763
New South Wales	\$22,757.3m	5.0%	28.9%	\$611
Victoria	\$16,772.2m	8.0%	21.3%	\$592
Other States	\$17,389.0m	7.5%	22.1%	\$750

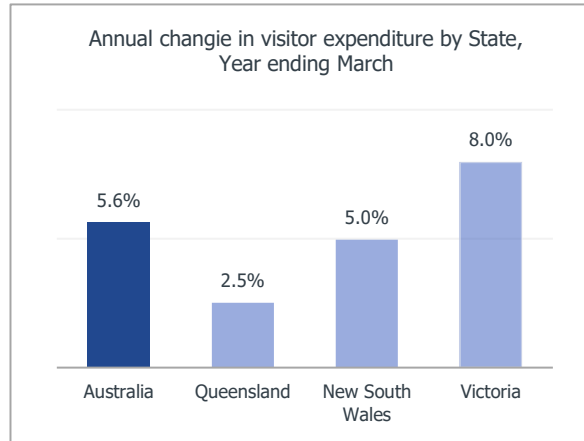
State visitation comparison

	Visitors	Annual Change	Avg stay	Annual # change
Total Australia	112,285,000	3.0%	3.6	0.1
Queensland	24,809,000	0.9%	4.0	0.0
New South Wales	37,243,000	4.6%	3.2	0.0
Victoria	28,310,000	1.7%	2.9	0.0
Other States	25,831,000	5.7%	4.1	0.1

Total holiday	43,537,000	-0.4%	3.8	0.0
Queensland	9,550,000	0.2%	4.3	-0.1
New South Wales	13,815,000	-1.7%	3.4	0.0
Victoria	11,868,000	1.5%	3.0	0.2
Other States	9,886,000	0.0%	4.2	0.1

Total VFR	38,277,000	3.8%	3.2	0.0
Queensland	8,622,000	5.7%	3.5	0.1
New South Wales	13,349,000	5.6%	2.9	-0.1
Victoria	9,686,000	-0.9%	2.7	-0.1
Other States	7,300,000	6.4%	3.6	0.0

Total business	26,209,000	6.8%	3.5	0.2
Queensland	5,783,000	-0.7%	3.7	0.1
New South Wales	8,278,000	12.8%	2.9	0.3
Victoria	5,564,000	3.1%	2.5	0.1
Other States	7,341,000	11.5%	4.5	0.3



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.

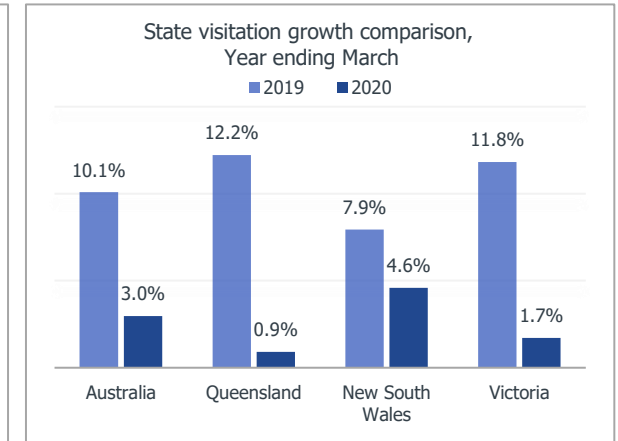
For this publication, data has been adjusted to conform to Tourism and Events Queensland's (TEQ) tourism region definitions.

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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