

Domestic Tourism Snapshot

Year ending December 2016

Domestic Visitors to Australia

	Visitors	Annual change ¹	Avg stay ²	Annual change
Total	90,742,000	▲ 4.2%	3.7	● -0.3%
Holiday	37,094,000	6.3%	3.9	2.5%
VFR ³	31,270,000	3.0%	3.3	-1.4%
Business	18,669,000	1.4%	3.5	-5.3%

Intrastate	62,997,000	▲ 4.7%	3.0	▼ -1.6%
Holiday	26,902,000	6.1%	3.1	1.8%
VFR	21,935,000	2.2%	2.4	-3.2%
Business	10,574,000	4.2%	3.4	-5.5%

Interstate	29,608,000	▲ 4.2%	5.0	▲ 1.0%
Holiday	11,024,000	8.0%	5.5	2.3%
VFR	9,650,000	4.6%	5.0	0.3%
Business	8,328,000	-1.6%	3.4	-5.5%

Expenditure in Australia

Australia	\$ million	Annual change
Total ⁴	\$60,967.0m	▲ 5.3%
Holiday ⁵	\$26,232.5m	9.0%
VFR ⁵	\$9,557.8m	3.0%
Business ⁵	\$10,815.6m	4.7%

Kicking goals

Domestic overnight visitation within Australia reached new record highs in the year ending December 2016. The number of trips taken by Australians rose 4.2% to 90.7 million, a new record, with QLD, NSW, VIC, WA, and ACT all boasting record visitation numbers.

Growing at a leisurely pace

The national-level growth in visitation is underpinned by leisure travellers with holidaymakers growing at a rate of 6.3% to 37.1 million, and those visiting friends and relatives (VFR) growing at 3.0% to 31.3 million. Healthy consumer confidence in 2016 helped to buoy leisure travel. Business travel on the other hand grew at a slower pace (+1.4%) with interstate business travel contracting by 1.6%.

National nights

The average length of overnight domestic trips was stable at 3.7 nights in the year ending December 2016 although Australians are taking slightly longer holiday trips and slightly shorter business trips than a year ago.

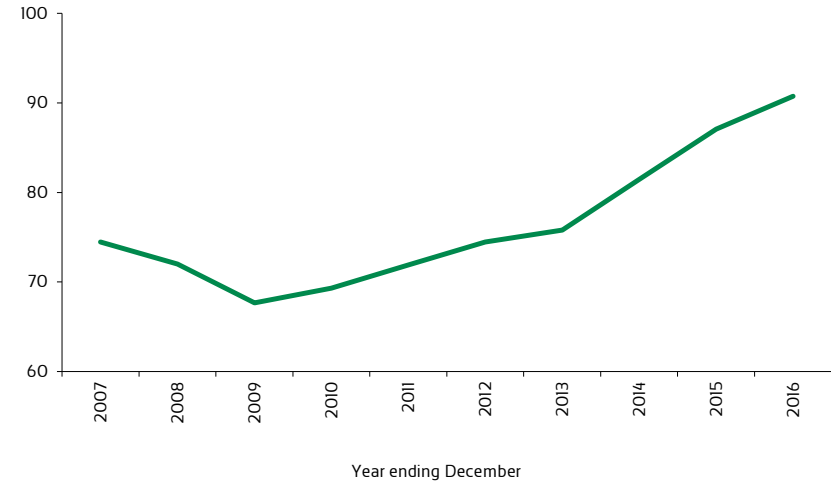
Open wallets

Australians travelling domestically spent \$61.0 billion on overnight travel in the year ending December 2016. This is 5.3% higher than a year ago and equates to an average spend of \$182 per night.

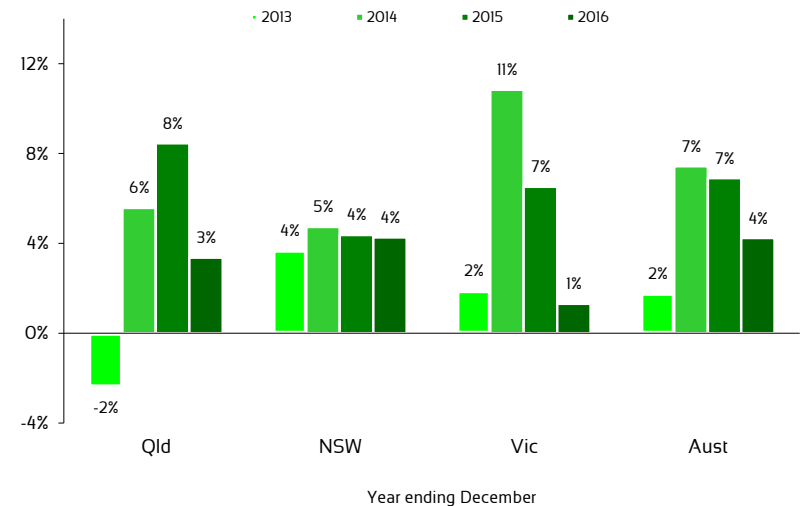
Disclaimer

In recent quarters, some unexpectedly high growth rates have appeared in some National Visitor Survey (NVS) sub-estimates. The issue is more pronounced when looking at purpose of travel and regional level information. TRA is reviewing the data and suggests that users of the NVS data interpret recent year on year growth rates with caution until further notice.

Domestic visitors within Australia (million)



State comparison - domestic visitors (percentage change)



Year ending December 2016

Domestic Visitors to Queensland

	Visitors	Annual change	Avg stay	Annual change
Total	20,798,000	▲ 3.4%	4.0	▲ 1.3%
Holiday	8,264,000	8.2%	4.5	3.9%
VFR	7,227,000	4.0%	3.5	-0.6%
Business	4,395,000	-4.4%	3.6	0.9%

	Visitors	Annual change	Avg stay	Annual change
Intrastate	14,544,000	▲ 1.4%	3.2	▲ 0.6%
Holiday	5,508,000	5.0%	3.4	4.2%
VFR	5,232,000	1.6%	2.7	-2.1%
Business	3,013,000	-4.2%	3.7	2.5%

	Visitors	Annual change	Avg stay	Annual change
Interstate	6,254,000	▲ 8.2%	5.8	● 0.1%
Holiday	2,756,000	15.2%	6.7	0.2%
VFR	1,995,000	10.6%	5.5	-1.8%
Business	1,382,000	-4.8%	3.4	-2.7%

Expenditure in Queensland

Queensland	\$ million	Annual change
Total ⁴	\$15,071.3m	▲ 4.0%
Holiday ⁵	\$6,910.2m	9.2%
VFR ⁵	\$2,265.4m	9.3%
Business ⁵	\$2,346.7m	-3.8%

More fun in the sun

Leisure travellers drove the 3.4% growth in total Queensland domestic visitation, while business trips fell 4.4% in the year ending December 2016. The growth in holiday and VFR visitation reflects the overall trend in Australia, however; Queensland is slightly outpacing (holiday +8.2%, VFR +4.0%) the national trend (holiday +6.3%, VFR +3.0%).

My backyard

Intrastate travel continues to make up the majority of Queensland domestic tourism (representing 69.9% of trips) and has recorded modest growth of 1.4% to 14.5 million trips in the year ending December 2016.

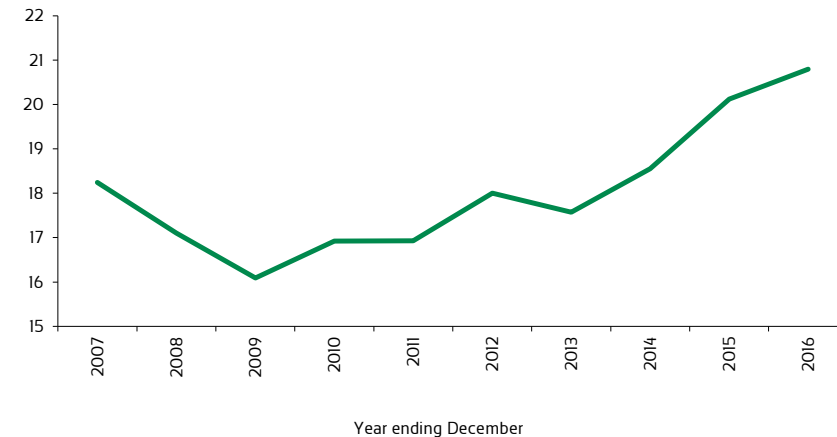
I know just the state

Holiday visitation to Queensland from other states was a highlight in the year ending December 2016, with a growth rate of 15.2%, bringing visitation to 2.8 million trips. Interstate VFR trips also recorded double-digit growth to 2.0 million visits, while interstate business followed the soft national trend downwards.

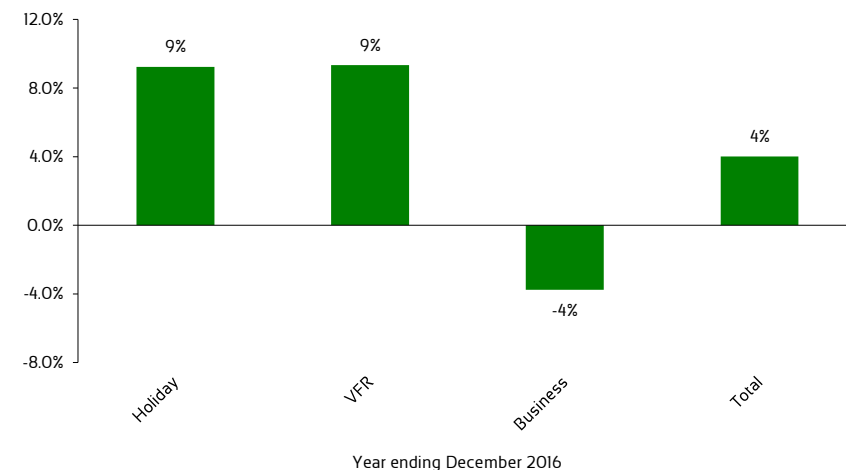
Expenditure growth

The amount of money spent by domestic visitors in Queensland rose to a record high of \$15.1 billion. Queensland's growth rate in expenditure outpaced key rival states NSW and VIC, especially in holiday expenditure, with Queensland's 9.2% growth in holiday spend higher than both NSW (+5.5%) and VIC (+6.2%).

Domestic visitors to Queensland (million)



Annual change in expenditure in Queensland - Purpose



Year ending December 2016

Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Brisbane	6,045,000	5.1%	1,631,000	19.8%
Gold Coast	3,722,000	1.7%	1,989,000	4.9%
Sunshine Coast	3,394,000	15.2%	1,944,000	15.4%
Fraser Coast	596,000	-0.3%	306,000	29.7%
Southern Qld Country ⁷	2,085,000	11.5%	575,000	8.3%
Southern GBR	1,976,000	1.6%	616,000	6.2%
Mackay	862,000	8.6%	177,000	22.9%
Whitsundays	464,000	3.8%	300,000	-2.3%
Townsville	1,158,000	7.5%	362,000	19.5%
TNQ	1,896,000	-11.3%	955,000	-11.9%
Three year trend	Visitors	Trend Change ⁸	Holiday visitors	Trend Change ⁸
Outback	531,000	13.6%	224,000	25.5%

Brisbane

Brisbane domestic overnight visitor numbers reached a record high of 6.0 million (up 5.1%). Brisbane domestic overnight holiday visitor numbers also reached a record high of 1.6 million (up 19.8%). Interstate holiday visitation increased strongly up 35.1% to 639,000, while intrastate holiday visitation was up 11.7% to 993,000.

Gold Coast

Domestic expenditure in the region increased 4.0% to \$3.0 billion. While nights were stable, average spend per person per night was up 3.9% to \$222 dollars.

While visitation (+1.7%) and visitor nights (+0.1%) in the Gold Coast were relatively stable there was a softening in domestic business visitation with the number of business visitors down 18.4% to 369,000.

Sunshine Coast

Sunshine Coast saw strong growth in the key measures of domestic overnight visitation, nights and expenditure in the year ending December 2016 with record highs in both visitation and expenditure (now at \$2.1 billion).

Tropical North Queensland

After a strong result in 2015, TNQ saw a decline in the key measures of domestic overnight visitation, nights and expenditure (now at \$1.9bn) for the year ending December 2016.

Southern Great Barrier Reef (SGBR)

An increase in domestic overnight visitor expenditure was recorded in SGBR with total spend reaching a record \$1.1 billion, up 11.6% year on year. Visitors to SGBR are staying on average 7.9% longer, now at 4.1 nights on average.

Southern Queensland Country

In the year ending December 2016, domestic visitors to SQC increased 11.5% to a record 2.1 million visitors, nights reached 6.4 million, while expenditure in the region was a record \$830.4 million, up 44.6% year on year.

Mackay

In the year ending December 2016 domestic visitors to Mackay increased 8.6% to 862,000 visitors, nights reached 3.1 million, while expenditure in the region was \$346.1 million, up 7.4% year on year.

Townsville

Townsville recorded good growth in domestic visitation in the year ending December 2016 up 7.5% to 1.2 million visitors. Visitor nights were stable at 4.1 million.

Whitsundays

The Whitsundays saw moderate growth in domestic overnight visitation in the year ending December 2016, up 3.8% year on year to 464,000 visitors. Expenditure in the region softened to \$504.5 million (-3.7%).

Fraser Coast

Domestic overnight visitation to the Fraser Coast remained stable at 596,000 while visitor nights increased in the year ending December 2016.

Outback

Domestic overnight travel to the Outback increased 13.6% in the three years to December 2016. In the three years to year ending December 2016, holidaymakers to the region increased by 25.5% to 224,000, growing more strongly than both VFR (13.2%) and business (6.0%) visitation.p

Intrastate visitors by region

Intrastate	Visitors	Annual change
Brisbane	3,564,000	1.4%
Gold Coast	1,902,000	-0.5%
Sunshine Coast	2,538,000	10.8%
Fraser Coast	448,000	-5.1%
Southern QLD Country ⁷	1,734,000	14.0%
Southern GBR	1,727,000	2.6%
Mackay	741,000	7.9%
Whitsundays	253,000	5.9%
Townsville	927,000	13.3%
TNQ	1,195,000	-16.8%

Interstate visitors by region

Interstate	Visitors	Annual change
Brisbane	2,481,000	11.0%
Gold Coast	1,819,000	4.1%
Sunshine Coast	856,000	30.7%
Fraser Coast	148,000	17.5%
Southern QLD Country ⁷	351,000	0.6%
Southern GBR	249,000	-4.2%
Mackay	120,000	12.1%
Whitsundays	211,000	1.4%
Townsville	231,000	-10.5%
TNQ	701,000	0.1%

For more insights and data specific to any of the Queensland regions listed above, please refer to the Regional Snapshots which are released quarterly and can be found on our website at www.teq.queensland.com

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Year ending December 2016

Domestic visitor expenditure⁴ in Australia by state

by State	\$ million	Annual change	Share	\$/Visitor
Queensland	\$15,071.3m	4.0%	24.7%	\$725
NSW	\$16,718.6m	3.8%	27.4%	\$571
VIC	\$12,189.3m	1.0%	20.0%	\$557
Other	\$16,982.1m	11.5%	27.9%	\$761
Total Australia	\$60,967.0m	5.3%	100%	\$672

Domestic visitor expenditure in Queensland by region

by Region	\$ million	Annual change	Share	\$/Visitor
Brisbane	\$3,568.4m	0.3%	23.7%	\$590
Gold Coast	\$2,990.6m	4.0%	19.8%	\$804
Sunshine Coast	\$2,116.0m	16.0%	14.0%	\$623
Fraser Coast	\$269.0m	-1.9%	1.8%	\$452
Southern QLD Country ⁷	\$830.4m	44.6%	5.5%	\$398
Southern GBR	\$1,084.8m	11.6%	7.2%	\$527
Mackay	\$346.1m	7.4%	2.3%	\$402
Whitsundays	\$504.5m	-3.7%	3.3%	\$1,087
Townsville	\$824.0m	-1.3%	5.5%	\$712
Outback	\$352.6m	13.3% ⁸	2.3%	\$664
TNQ	\$1,943.1m	-15.5%	12.9%	\$1,025

Data Source:

The information included in this report refers to overnight visitor data extracted from the National Visitor Survey, managed by Tourism Research Australia. Approximately 120,000 Australian residents aged 15 and over are surveyed on an annual basis 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 tourism region definitions. These are consistent with current Regional Tourism Organisation boundaries.

For Further Information:

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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. VFR: Visiting friends or relatives. Please note: Figures for regional visitation may be impacted by the VFR market. VFR visitors typically stay with friends or family and as such their commercial impact on the tourism industry can be less obvious than that of holiday or business visitors.
4. Expenditure including airfares and long distance transport costs.
5. Expenditure excluding airfares and long distance transport costs.
6. Leisure: the purposes of holiday and VFR combined.
7. The Southern Queensland Country region is inclusive of the Toowoomba, South Burnett, Southern Downs and Western Downs regions.
8. Trend change refers to the percentage change between the three years to this year ended, compared to the three years to the year prior.

Tourism Research Australia have implemented a dual frame methodology to the National Visitor Survey, effective from January 2014. Using a dual frame survey methodology, a portion of the sample is collected from residential landlines and another from mobile phones. This will help overcome potential bias caused by an increasing proportion of Australia's population being outside the scope of the NVS because they live in "mobile phone only" households. For this reason, annual change results are a guide only as they are not directly comparable.

n/p Not publishable

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