

Domestic Tourism Snapshot

Year ending March 2017

Domestic overnight visitors within Australia

	Visitors	Annual change ¹	Avg stay ²	Annual change
Total Australia	91,683,000	3.1%	3.7	0.7%
Holiday	37,035,000	0.5%	3.9	0.0%
VFR ³	31,512,000	4.4%	3.3	3.1%
Business	19,175,000	5.2%	3.4	-3.4%

Intrastate	63,833,000	3.4%	2.9	-1.4%
Holiday	26,860,000	-0.1%	3.1	-0.5%
VFR	22,017,000	3.5%	2.4	-1.3%
Business	11,081,000	9.1%	3.3	-5.8%

Interstate	29,806,000	3.7%	5.0	2.6%
Holiday	10,990,000	2.6%	5.4	-0.6%
VFR	9,851,000	7.1%	5.2	6.4%
Business	8,331,000	0.5%	3.4	-0.2%



Australians on the move

Record highs have been set in the year ending March 2017, with Australian domestic overnight visitation growing by 3.1% to a record 91.7m trips. These visitors stayed for a record 335.5m nights. At the state level, QLD, NSW, VIC and TAS all set new domestic visitation records.

Spending on travel

Expenditure by overnight domestic visitors also reached a record high, with \$61.7bn spent in Australia (up 6.3% on the year ending March 2016). Each visitor spent on average \$673, which is 3.1% more than a year ago. Five states/territories enjoyed record spend levels in the year ending March 2017, these were QLD, NSW, VIC, TAS and ACT.

Holiday spenders

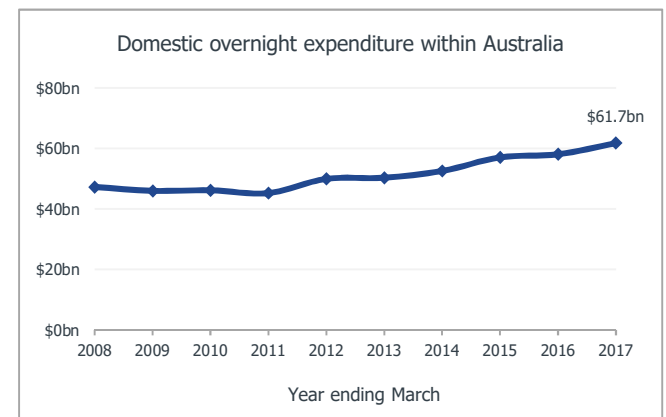
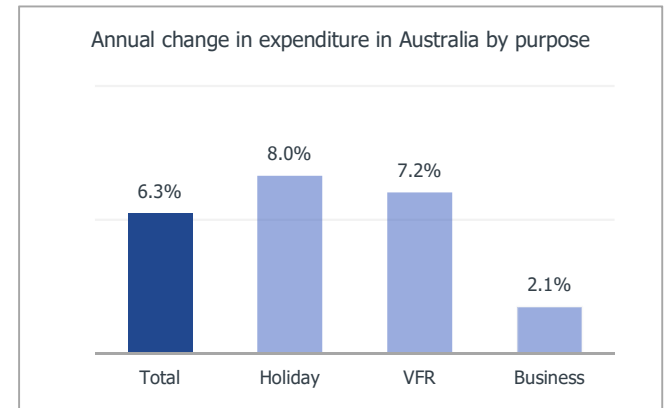
The number of holiday visitors in Australia was stable (+0.5%) in the year ending March 2017. These holiday visitors, however, each spent on average 7.4% more than a year ago which has propelled holiday expenditure to a record high \$26.6bn (up 8.0%).

Visitors always welcome

The number of trips taken by Australians to visit friends and relatives (VFR) grew 4.4% to a record high 31.5m trips. QLD, NSW, VIC and TAS all welcomed record numbers of VFR visitors to their states.

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual change ¹
Total Australia⁴	\$61,747.5m	6.3%
Holiday ⁵	\$26,615.8m	8.0%
VFR ⁵	\$9,675.8m	7.2%
Business ⁵	\$10,702.6m	2.1%



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Domestic overnight visitors in Queensland

	Visitors	Annual change	Avg stay	Annual change
Total Queensland	21,234,000	4.3%	3.9	0.7%
Holiday	8,163,000	-1.5%	4.5	2.9%
VFR	7,386,000	5.2%	3.5	4.1%
Business	4,631,000	10.6%	3.3	-7.4%

Intrastate	14,852,000	4.1%	3.2	1.1%
Holiday	5,420,000	-3.0%	3.4	3.4%
VFR	5,328,000	4.6%	2.7	2.2%
Business	3,201,000	12.8%	3.4	-6.1%

Interstate	6,381,000	4.9%	5.7	-0.1%
Holiday	2,742,000	1.6%	6.7	1.0%
VFR	2,058,000	6.7%	5.6	5.9%
Business	1,430,000	6.0%	3.1	-10.5%

Raising the bar

Domestic overnight visitor expenditure in Queensland grew to a record \$15.3bn in the year ending March 2017 with Queensland's share of total expenditure relatively stable at 24.7%. NSW, VIC, TAS and ACT also set records for expenditure in the year ending March 2017.

Growth areas

Queensland's domestic visitation grew the most among those travelling for business (+10.6%) and those visiting friends and relatives (+5.2%). Holiday visitation was stable (-1.5%), and these visitors spent 4.4% more per person per night compared to a year ago and stayed 2.9% longer which resulted in healthy growth of overall holiday expenditure in Queensland (+4.7%).

Interstate and intrastate visitation in Queensland both had similar growth rates in the year ending March 2017. Business travellers were the main driver of the growth in intrastate visitation while business and VFR trips were the key drivers of interstate growth.

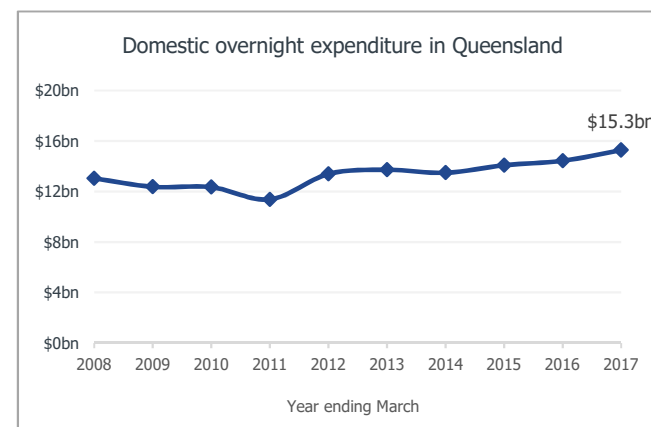
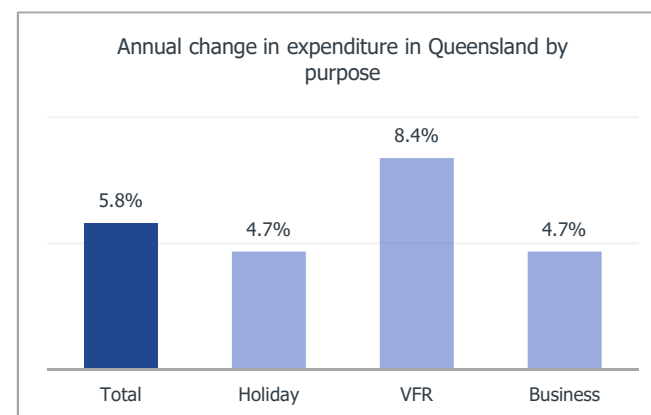
Regional records

A number of regional records were set in the year ending March 2017. Five of Queensland's tourism regions set new visitation records, with Brisbane welcoming 6.2m visitors, Gold Coast 3.9m, Sunshine Coast 3.4m, Mackay 878,000, and the Outback 806,000. In addition, overnight expenditure in Brisbane, Southern Queensland Country (SQC) and the Outback all set new records in the year ending March 2017.

Note: Cyclone Debbie hit Queensland in late March 2017 and forced the temporary closure of a number of tourism operators, some for extended periods of time. The impact of this on regional visitation, if any, would not begin to show until the next data release: for the year ending June 2017.

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change
Total Queensland⁴	\$15,280.9m	5.8%
Holiday ⁵	\$6,977.1m	4.7%
VFR ⁵	\$2,286.3m	8.4%
Business ⁵	\$2,392.4m	4.7%



Domestic Tourism Snapshot

Year ending March 2017



Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	21,234,000	4.3%	8,163,000	-1.5%
Brisbane	6,249,000	9.3%	1,536,000	-5.0%
Gold Coast	3,908,000	7.5%	2,079,000	2.9%
Sunshine Coast	3,436,000	6.0%	1,884,000	1.8%
Fraser Coast	595,000	-2.3%	289,000	-10.0%
SQC ⁷	1,898,000	3.1%	524,000	2.4%
SGBR ⁶	1,950,000	-1.6%	641,000	4.5%
Mackay	878,000	7.0%	173,000	0.5%
Whitsundays	477,000	-2.9%	308,000	-2.7%
Townsville	1,115,000	-8.9%	346,000	-7.2%
TNQ	1,801,000	-6.9%	876,000	-15.4%

	Visitors	Trend change ⁸	Holiday visitors	Trend change
Outback	806,000	11.0%	277,000	15.7%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$15,280.9m	5.8%	100%	\$719.7
Brisbane	\$3,707.9m	11.5%	24.3%	\$593.4
Gold Coast	\$3,068.0m	3.5%	20.1%	\$785.0
Sunshine Coast	\$2,057.0m	-0.5%	13.5%	\$598.6
Fraser Coast	\$293.0m	7.2%	1.9%	\$492.1
SQC	\$773.3m	42.9%	5.1%	\$407.5
SGBR	\$1,080.9m	11.9%	7.1%	\$530.5
Mackay	\$382.9m	25.8%	2.5%	\$436.3
Whitsundays	\$538.5m	8.6%	3.5%	\$1,129.2
Townsville	\$757.7m	-11.3%	5.0%	\$679.8
TNQ	\$1,886.2m	-8.4%	12.3%	\$1,047.3

	Expenditure	Trend change	Share	Spend per visitor
Outback	\$498.1m	7.1%	3.3%	\$618.0

Brisbane

Brisbane enjoyed record highs in both domestic overnight visitation and expenditure with 6.2m visitors (up 9.3%) who spent \$3.7bn in the region (up 11.5%). This growth was driven by purposes other than holiday, with growth in business sector visitation (up 14.1% to 1.6m) and growth among those visiting friends and relatives (up 8.6% to 2.6m). Holiday visitor numbers decreased by 5.0% to 1.5m visitors in the year ending March 2017, which was driven by fewer Brisbane residents holidaying within the region.

Gold Coast

Domestic overnight visitation numbers were also at a record high on the Gold Coast, with 3.9m visitors and 7.5% year on year growth in the year ending March 2017. Visitation grew across all purposes of travel in the year ending March 2017, with the strongest growth coming from those visiting friends and relatives (VFR up 14.9% to 1.3m), especially among those visiting from Brisbane. Domestic overnight expenditure grew by 3.5% to \$3.1bn.

Sunshine Coast

Sunshine Coast saw growth in overnight domestic visitation, up 6.0% to reach a record high 3.4m visitors. This record visitation was primarily driven by VFR visitation, which grew 16.0% in the year ending March 2017 to a record high of 1.2m visitors. Visitation for all other purposes of travel was relatively stable. Overall visitor nights in the region grew strongly, up 7.6%, and overnight expenditure was stable.

Tropical North Queensland (TNQ)

Following record expenditure in the year ending March 2016, TNQ saw a decline in domestic overnight visitation and expenditure for the year ending March 2017. Visitor nights in the region remained stable. Visitation for VFR purposes grew by 4.1% to 406,000, business was stable (-0.8%) at 447,000 and holiday visitation declined by 15.4% to 876,000 visitors. While holiday visitation was down, holidaymakers' average length of stay was up by 0.6 nights.

Southern Great Barrier Reef (SGBR)

In the year ending March 2017, visitors to SGBR spent 10.2% more per person per night (now at \$140/night on average) which has driven overnight expenditure growth of 11.9% (to \$1.1bn overall). There was a slight decrease in visitation to the region with visitation down 1.6% to 2.0m. However, holiday visitation to SGBR grew 4.5% to 641,000 visitors who stayed 2.6m nights (up 16.2%).

Southern Queensland Country (SQC)

Expenditure growth in SQC was strong in the year ending March 2017 (up 42.9% to a record high \$773.3). This was driven by longer stays and visitors spending more per night. Domestic visitation also grew, up 3.1%, driven by a strong interstate market (up 14.1%).

Mackay

In the year ending March 2017 domestic visitors to Mackay increased 7.0% to 878,000 visitors, nights reached 3.2m, while expenditure in the region was \$382.9m, up 25.8% year on year. Growth in the region was driven predominately by more business and VFR visitors as well as longer stays by holidaymakers.

Townsville

Domestic business travel to Townsville was stable, with 1.0% growth to 338,000 visitors, while intrastate business trips grew 10.6% to 304,000. Holiday visitation declined by 7.2% overall, however the interstate holiday market grew by 7.0%. The decline in overall visitation resulted in an overall decline in domestic nights and overnight expenditure to the region.

Whitsundays

Domestic visitor nights and expenditure both grew strongly in the year ending March 2017, up 10.3% and 8.6% respectively. Driving this growth was longer stays (up 0.5 to 4.9 nights on average), especially among holidaymakers and business travellers.

Fraser Coast

Domestic visitor nights and expenditure both grew (by 7.1% and 7.2% respectively) due to an increase in business travellers who also stayed longer in the region. Overnight visitation to Fraser Coast decreased slightly, by 2.3% to 595,000, driven by all purposes of travel except for business.

Outback

Domestic overnight travel to the Outback increased by 11.0% in the three years to March 2017. Growth was driven primarily by holidaymakers to the region (up 15.7% to 277,000), with VFR and business travel also showing strong growth (+8.1% and +5.4% respectively). The intrastate market is the region's largest, accounting for 77.2% of visitation, and was up by 11.8%.

Intrastate visitation

	Visitors	Annual change
Total intrastate	14,852,000	4.1%
Brisbane	3,718,000	13.1%
Gold Coast	2,059,000	10.1%
Sunshine Coast	2,543,000	3.2%
Fraser Coast	466,000	2.7%
SQC	1,556,000	1.0%
SGBR	1,712,000	-0.6%
Mackay	774,000	9.8%
Whitsundays	254,000	1.3%
Townsville	896,000	-5.8%
TNQ	1,151,000	-5.7%

Interstate visitation

	Visitors	Annual change
Total interstate	6,381,000	4.9%
Brisbane	2,531,000	4.2%
Gold Coast	1,849,000	4.8%
Sunshine Coast	893,000	14.7%
Fraser Coast	130,000	-17.0%
SQC	341,000	14.1%
SGBR	239,000	-8.3%
Mackay	104,000	-10.1%
Whitsundays	223,000	-7.2%
Townsville	218,000	-19.8%
TNQ	650,000	-8.8%

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Year ending March 2017

State expenditure comparison

	Expenditure	Annual change	Share of expenditure	Spend per visitor
Total Australia	\$61,747.5m	6.3%	100%	\$673.5
Queensland	\$15,280.9m	5.8%	24.7%	\$719.7
New South Wales	\$16,720.5m	3.3%	27.1%	\$568.5
Victoria	\$12,677.9m	11.6%	20.5%	\$562.4
Other States	\$17,068.2m	6.0%	27.6%	\$772.5

State visitation comparison

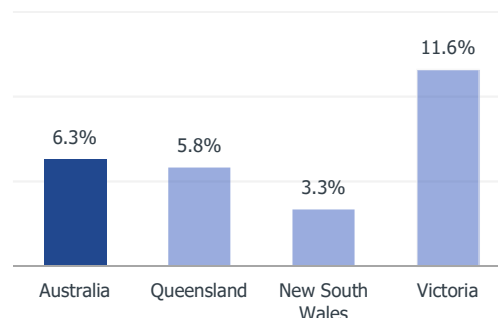
	Visitors	Annual Change	Avg stay	Annual change
Total Australia	91,683,000	3.1%	3.7	0.7%
Queensland	21,234,000	4.3%	3.9	0.7%
New South Wales	29,412,000	4.0%	3.3	2.5%
Victoria	22,542,000	6.2%	2.9	-0.9%
Other States	21,717,000	-1.3%	4.2	0.3%

Total holiday	37,035,000	0.5%	3.9	0.0%
Queensland	8,163,000	-1.5%	4.5	2.9%
New South Wales	11,642,000	-0.9%	3.4	-2.3%
Victoria	9,798,000	2.1%	3.1	-0.1%
Other States	8,744,000	2.8%	4.2	-0.2%

Total VFR	31,512,000	4.4%	3.3	3.1%
Queensland	7,386,000	5.2%	3.5	4.1%
New South Wales	10,720,000	6.5%	3.1	4.8%
Victoria	7,762,000	8.8%	2.9	0.2%
Other States	6,247,000	-4.4%	3.6	3.5%

Total business	19,175,000	5.2%	3.4	-3.4%
Queensland	4,631,000	10.6%	3.3	-7.4%
New South Wales	5,496,000	6.4%	2.8	8.2%
Victoria	3,898,000	11.0%	2.3	-5.7%
Other States	5,602,000	-3.9%	4.5	-2.6%

Annual change in visitor expenditure by state



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 2014 TRA moved to a new methodology for the NVS that included mobile phone interviewing as part of a dual frame overlap survey. This initiative was part of TRA's continuous improvement program. The inclusion of mobile phone users ultimately delivers greater domestic tourism data accuracy. Advancements in the quality of mobile telephone data sets which, were implemented in the NVS build process in late 2015 caused anomalies in the growth rate of some components. This has required back-casting to align the data and allow for the continuation of the time series. Moving forward, the quality of data that the NVS produces will be more accurate as it better reflects the Australian resident population and phone ownership.

The back-cast results have seen a change in volume estimates in 2014 and 2015. Results for other years have not been affected. The average growth rate over the five-year trend has not changed. However, due to the volume changes in 2014 and 2015, growth rates previously published will, in most cases, be reduced in line with the long-term trend.

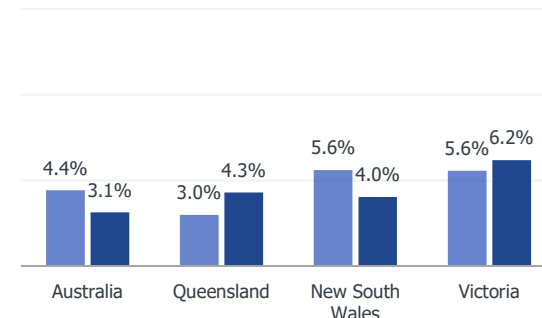
Please visit tra.gov.au for more information on the back-casting process and impact on results.

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State visitation growth comparison, year ending March

■ 2016 ■ 2017



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.
4. Expenditure including airfares and long distance transport costs.
5. Expenditure excluding airfares and long distance transport costs.
6. SGBR = Southern Great Barrier Reef. Region is inclusive of Capricorn, Gladstone and Bundaberg.
7. SQC = 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 prior year ending.

n/p = Not publishable

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