

Domestic Tourism Snapshot

Year ending September 2019

New NVS methodology, 2019

Tourism Research Australia has transitioned NVS sampling to 100% mobile phone interviews (from 50% mobile phone/50% landline) to reflect current phone usage trends. The change in methodology has seen a break in series, so please use caution when comparing 2019 results with previous time periods.

Note that 2017 and 2018 estimates have been revised to align with the latest release of ABS population projections and will differ slightly from previously published estimates.

Should you wish to access the updated estimates please refer to TEQs [Tourism Data explorer](#)

	Visitors	Annual ¹ change	Avg stay ²	Annual # change
Total Australia³	115,689,000	12.3%	3.5	0.0
Holiday ⁴	45,864,000	9.9%	3.8	0.0
VFR ⁵	39,340,000	12.4%	3.2	0.0
Business	26,382,000	17.1%	3.4	0.1

Intrastate	80,480,000	13.4%	2.9	0.0
Holiday	33,647,000	10.2%	3.0	-0.1
VFR	28,010,000	13.0%	2.5	0.0
Business	14,666,000	23.1%	3.3	-0.1

Interstate	37,453,000	10.4%	4.7	0.0
Holiday	13,214,000	9.6%	5.5	0.1
VFR	11,692,000	11.1%	4.7	-0.1
Business	12,044,000	11.0%	3.4	0.2



Home records

A record 115.7m domestic trips were taken in Australia in the year ending September 2019, up 12.3% over the year. These visitors spent a record \$79.1bn, up by 13.3%. All of the states except Tasmania and the Northern Territory reached visitation records and all except Tasmania reached domestic expenditure records.

In comparison domestic overnight visitation to Queensland grew by 13.7%, while visitation from New South Wales grew by 12.4% and visitation from Victoria grew by 12.8%.

Business travel responds to good conditions

Business travel was the fastest growing category in terms of domestic visitation and overnight expenditure, although records were reached for all purposes, both in terms of visitation and overnight expenditure. Business expenditure grew by 17.5% to \$14.9 billion on the back of visitation, which grew by 17.1% to 26.4m.

Conditions in the business sector have continuously improved in the year ending September 2019. Company profits have reached record highs, increasing 10.2% year-on-year. Growth was led by the mining sector (up 25.0% year-on-year) which was supported by high commodity prices throughout the period. Non-mining business profits also rose, though more modestly (up 2.1% YoY).

Holiday visitation remains the largest domestic market by purpose accounting for 42% of domestic visitors expenditure. Holiday visitation increased by 9.9% to 45.9m and overnight visitor expenditure increased 12.0% to \$32.97bn.

The lower Australian dollar corresponds to the slow down in growth in international outbound travel by Australian residents. It seems that the low Australian dollar may have deterred some Australians to travel overseas, instead, they elected to travel within Australia.

Travel to visit friends and relatives grew by 12.4% to 39.3m and expenditure increased 10.3% to \$12.4bn.

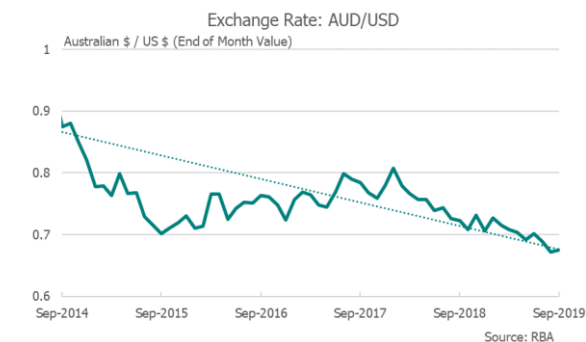
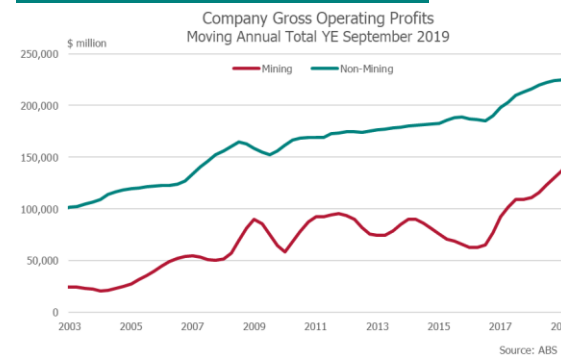
By interstate vs intrastate

The intrastate market accounts for 70% of the domestic visitation and drove the growth in both expenditure (up 13.3% to \$42.6bn) and visitation (up 13.4% to 80.5m). Business visitation growth was particularly driven by the intrastate market. Intrastate business visitation grew by 23.1% to 14.7m.

Interstate overnight visitor expenditure grew by 13.2% to \$36.5bn, while visitation grew by 10.4% to 37.5 million.

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual ¹ change
Total Australia⁵	\$79,115.6m	13.3%
Holiday ⁶	\$32,970.2m	12.0%
VFR ⁶	\$12,376.3m	10.3%
Business ⁶	\$14,914.9m	17.5%



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Domestic overnight visitors in Queensland

	Visitors	Annual change	Avg stay	Annual # change
Total Queensland	25,704,000	13.7%	4.0	-0.1
Holiday	9,828,000	8.6%	4.4	-0.1
VFR	8,765,000	16.7%	3.3	-0.1
Business	6,234,000	24.4%	3.7	-0.2

Intrastate	17,862,000	14.1%	3.3	0.0
Holiday	6,562,000	6.9%	3.1	-0.1
VFR	6,387,000	19.2%	2.6	0.0
Business	4,127,000	25.4%	3.9	0.0

Interstate	7,842,000	12.9%	5.6	-0.2
Holiday	3,266,000	12.2%	7.1	0.0
VFR	2,379,000	10.6%	5.3	-0.2
Business	2,108,000	22.5%	3.2	-0.4

Queensland's visitation grows

Domestic overnight visitor expenditure in Queensland grew by 9.4% to a record \$19.0bn on the back of overnight visitation which grew by 13.7% to a record 25.7m, although spend per visitor decreased by 3.8% to \$741 per visitor.

Business continues leading

The growth in both expenditure and visitation in Queensland was led by business travel, with business expenditure up 14.1% to \$3.3bn and visitation up by 24.4% to a record 6.2m.

Holiday visitation, which is Queensland's largest domestic market, grew by 8.6% to 9.8m so that holiday expenditure grew by 9.2% to a record \$8.6bn. The interstate holiday market drove holiday visitation, increasing by 12.2% over the year to 3.3m while the intrastate market grew by 6.9% to 6.6m.

VFR visitation grew by 16.7% to a record 8.8m and expenditure grew 7.3% to \$2.8bn. VFR visitation growth came predominantly from the intrastate market (up 19.2% to record 6.4m), rather than the interstate market (up 10.6% to 2.4m).

Regional highs

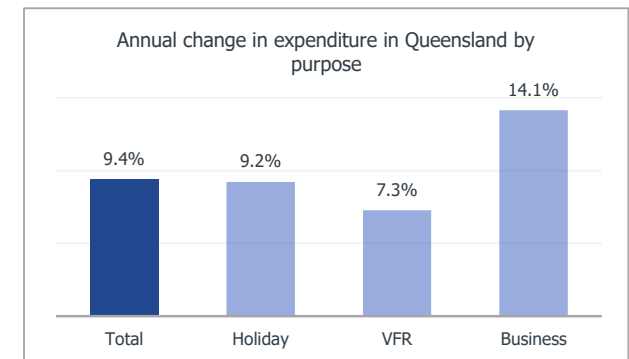
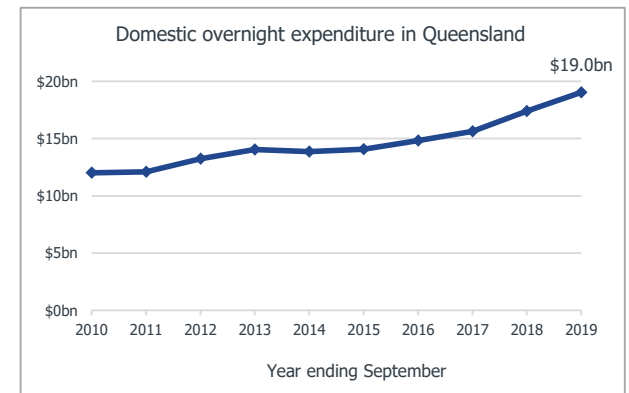
Four of Queensland's tourism regions reached record levels of visitor expenditure in the year ending September 2019: Brisbane (\$5.1bn), Sunshine Coast (\$2.6bn), Tropical North Queensland (\$2.4bn) and Fraser Coast (\$446.0m).

Six of Queensland's tourism regions welcomed a record number of visitors. These were Brisbane (7.9m), Tropical North Queensland (2.2m), Southern Queensland Country (2.3m), Outback (1.1m) Whitsundays (647,000) and Fraser Coast (804,000).



Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change
Total Queensland	\$19,038.5m	9.4%
Holiday ⁶	\$8,592.7m	9.2%
VFR ⁶	\$2,815.2m	7.3%
Business ⁶	\$3,279.1m	14.1%



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Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	25,704,000	13.7%	9,828,000	8.6%
Brisbane	7,939,000	11.6%	2,298,000	11.4%
Gold Coast	4,124,000	13.6%	2,173,000	11.4%
Sunshine Coast	3,973,000	14.8%	2,101,000	9.5%
SQC ⁷	2,345,000	19.8%	667,000	14.3%
SGBR ⁸	2,313,000	11.8%	706,000	-5.9%
Townsville	1,368,000	3.8%	426,000	-3.0%
TNQ ⁹	2,188,000	8.5%	1,132,000	7.6%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	804,000	11.1%	407,000	8.8%
Mackay	1,097,000	13.8%	193,000	4.5%
Outback	1,078,000	8.6%	300,000	-0.3%
Whitsundays	647,000	7.9%	400,000	6.8%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$19,038.5m	9.4%	100%	\$741
Brisbane	\$5,113.0m	16.6%	26.9%	\$644
Gold Coast	\$3,711.7m	14.0%	19.5%	\$900
Sunshine Coast	\$2,629.6m	12.5%	13.8%	\$662
SQC	\$805.5m	6.2%	4.2%	\$344
SGBR	\$1,147.8m	-1.5%	6.0%	\$496
Townsville	\$791.1m	-10.3%	4.2%	\$578
TNQ	\$2,427.1m	5.7%	12.7%	\$1,109

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$446.0m	19.0%	2.3%	\$555
Mackay	\$519.2m	16.7%	2.7%	\$473
Outback	\$676.5m	11.8%	3.6%	\$627
Whitsundays	\$635.7m	7.3%	3.3%	\$983

* STR Global surveys Queensland accommodation establishments with 10 or more rooms. STR Global's North Queensland region includes Cairns, Port Douglas and Palm Cove.

Brisbane

Domestic visitor expenditure grew by 16.6% to a record \$5.1bn on the back of visitation growing by 11.6% to a record 7.9 million visitors and spend per visitor increasing by 4.5% to \$644 per person. The growth in visitation was driven by VFR travel which increased by 14.2% to a record 3.2m, while holiday (up 11.4% to 2.3m) and business (up 8.9% to 1.9m) travel also grew to new records. Visitation growth was particularly prominent from interstate (up 17.7% to 3.4million). Brisbane's largest interstate markets are Sydney (up 9.7% to 973,000), regional New South Wales (up 3.6% to 863,000) and Melbourne (up 17.1% to 634,000). Intrastate visitation grew by 7.5% to 4.5m, with the largest intrastate markets being intraregional travel (up 4.5% to 1.4m) and the Sunshine Coast (up 21.2% to 811,000).

Gold Coast

Visitor expenditure grew by 14.0% to \$3.7bn on the back of visitation which increased by 13.6% to 4.1m. The growth in visitation to the Gold Coast was due to VFR travel, which increased by 27.2% to a record 1.3m, while holiday (up 11.4% to 2.2m) and business (up 6.2% to 531,000) also grew. The intrastate market drove growth (up 18.9% to 2.0m), particularly for VFR visitors (up 30.1% to 717,000) and business markets (up 40.7% to 224,000). The largest intrastate market is Brisbane (up 23.4% to 1.4m). Interstate visitation grew by 9.1% over the year to 2.1m with particularly strong growth coming from Sydney (up 11.7% to 673,000) and Melbourne (up 16.5% to 428,000). Visitation decreased year-on-year in the September quarter, which may be related to bushfires that occurred around Northern NSW and Beechmont that may have deterred holiday and business travellers around the Gold Coast region.

Fraser Coast

Annual visitor expenditure grew by 19.0% on average over the past three years to a record \$446.0m. This reflected visitation which grew 11.1% on average to a record 804,000 over the same period, as well as ALoS which grew by 4.1% on average to 4.0 nights and average spend per night which grew by 3.5% on average to \$137 per night. The holiday market grew by 8.8% on average to 407,000 and VFR grew by 9.3% on average over the past three years to 274,000. Intrastate visitation grew by 11.6% on average over the past three years to 617,000, while interstate visitation grew by 9.6% on average to 187,000.

Sunshine Coast

Sunshine Coast's overnight visitor expenditure grew by 12.5% to a record \$2.6bn, on the back of visitation which grew by 14.8% to 3.97m. Growth in visitation to the Sunshine Coast was driven by VFR (up 20.5% to 1.4m) and business (up 34.6% to 379,000) visitation which reached new records. Holiday visitation to the region also grew, increasing 9.5% over the year to 2.1m. Interstate visitation grew by 27.3% to a record 1.0m, thanks to interstate holiday visitation which grew 34.7% to 622,000. Interstate growth was particularly strong from Sydney (up 44.8% to 275,000) and Melbourne (up 31.3% to 248,000). Intrastate visitation grew by 10.9% to 2.9m, with the largest intrastate market being Brisbane (up 4.9% to 1.8m). In the September quarter, visitation decreased year-on-year which may in part reflect bushfires that occurred around Peregian beach in early September.

Whitsundays

Annual visitor expenditure increased by 7.3% on average over the three years to \$635.7m, in line with visitation to the Whitsundays, which grew by 7.9% on average over the same period to a record 647,000. Holiday visitation accounts for 62% of Whitsundays' domestic market, it grew by 6.8% on average over the past three years to 400,000. The intrastate market (up 13.9% on average to 399,000) drove growth, as interstate visitation remained steady (down 0.8% on average) at 248,000.

Tropical North Queensland (TNQ)

Overnight visitation to TNQ grew by 8.5% to a record 2.2m so that overnight visitor expenditure grew by 5.7% to a record \$2.4bn. Expenditure growth was slower than visitation due to spend per night decreasing by 6.2% to \$219 per night, which in part reflects an increase in the proportion of nights spent by visitors in lower cost accommodation such as camping and caravanning and private accommodation. Visitation growth was led by business (up 18.4% to a record 482,000) and VFR (up 12.1% to 515,000), while TNQ also welcomed a record number of holiday visitors (up 7.6% to a record 1.1m). Intrastate visitation growth (up 9.3% to 1.4m) was a bit stronger than interstate visitation (up 7.0% to a record 757,000). The largest intrastate market is intraregional travel (up 4.4% to a record 698,000), while the largest interstate markets are Victoria (up 24.2% to 349,000) and New South Wales (down 2.9% to 288,000). Quarterly data reveals a particularly strong September quarter in TNQ for holiday visitation growth.

Intrastate visitation

	Visitors	Annual change
Total intrastate	17,862,000	14.1%
Brisbane	4,547,000	7.5%
Gold Coast	1,999,000	18.9%
Sunshine Coast	2,928,000	10.9%
SQC	1,914,000	19.6%
SGBR	2,049,000	16.5%
Townsville	1,100,000	5.2%
TNQ	1,431,000	9.3%

	Visitors	3-yr trend
Fraser Coast	617,000	11.6%
Mackay	962,000	14.5%
Outback	863,000	10.1%
Whitsundays	399,000	13.9%

Interstate visitation

	Visitors	Annual change
Total interstate	7,842,000	12.9%
Brisbane	3,392,000	17.7%
Gold Coast	2,125,000	9.1%
Sunshine Coast	1,045,000	27.3%
SQC	431,000	20.7%
SGBR	263,000	-15.0%
Townsville	268,000	-1.7%
TNQ	757,000	7.0%

	Visitors	3-yr trend
Fraser Coast	187,000	9.6%
Mackay	134,000	9.1%
Outback	215,000	3.6%
Whitsundays	248,000	-0.8%

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Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	25,704,000	13.7%	9,828,000	8.6%
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TNQ ⁹	2,188,000	8.5%	1,132,000	7.6%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	804,000	11.1%	407,000	8.8%
Mackay	1,097,000	13.8%	193,000	4.5%
Outback	1,078,000	8.6%	300,000	-0.3%
Whitsundays	647,000	7.9%	400,000	6.8%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$19,038.5m	9.4%	100%	\$741
Brisbane	\$5,113.0m	16.6%	26.9%	\$644
Gold Coast	\$3,711.7m	14.0%	19.5%	\$900
Sunshine Coast	\$2,629.6m	12.5%	13.8%	\$662
SQC	\$805.5m	6.2%	4.2%	\$344
SGBR	\$1,147.8m	-1.5%	6.0%	\$496
Townsville	\$791.1m	-10.3%	4.2%	\$578
TNQ	\$2,427.1m	5.7%	12.7%	\$1,109

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Fraser Coast	\$446.0m	19.0%	2.3%	\$555
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Outback	\$676.5m	11.8%	3.6%	\$627
Whitsundays	\$635.7m	7.3%	3.3%	\$983

Townsville

Total visitation to Townsville grew by 3.8% to 1.4 million, but overnight visitor expenditure decreased 10.3% to \$791.1m, reflecting a 12.7% decline in spend per night to \$174 per night. This in part reflects a decrease in the proportion of nights spent in commercial accommodation. In turn this may reflect the fact that holiday visitation decreased by 3.0% over the year to 426,000. Over the same period VFR (up 2.3% to 410,000) and business (up 2.3% to 401,000) visitation grew. Intrastate visitation increased by 5.2% over the year to 1.1m, largely thanks to intraregional travel which increased 34.3% to 418,000 visitors. Over the same period interstate travel decreased slightly (1.7%) to 268,000 visitors.

Southern Great Barrier Reef (SGBR)

Visitation to SGBR increased by 11.8% to 2.3m, but overnight visitor expenditure decreased 1.5% to \$1.1b, reflecting a 9.8% reduction in spend per night to \$129 per night. The increase in visitation was due to the VFR (up 29.3% to 707,000 visitors) and business (up 19.4% to 737,000) markets but holiday visitation was down 5.9% over the year to 706,000. The increase in visitation was due to the intrastate market which grew by 16.5% to 2.0m. The largest two intrastate markets are Brisbane (up 42.8% to 650,000) and intraregional travel (up 14.4% to 699,000). Interstate visitation drove the decline in holiday visitation, with total interstate visitation decreasing 15.0% to 263,000 and holiday interstate visitation decreasing 20.3% to 128,000.

Southern Queensland Country (SQC)

Visitation to Southern Queensland Country grew by 19.8% to a record 2.3m, while visitor expenditure grew by 6.2% to \$805.5m. Over this period the ALoS decreased by 0.3 nights (down 10.0%) to 2.6 nights. The increase in visitation occurred across all purposes, with holiday (up 14.3% to 667,000), VFR (up 21.1% to 943,000) and business (36.1% to 589,000) reaching new records. The intrastate market grew by 19.6% to a record 1.9m, including a record 922,000 visitors from Brisbane (up 22.1%). Interstate visitation grew by 20.7% to a record 431,000 visitors, including 280,000 visitors from New South Wales (up 15.2%).

Mackay

Annual overnight visitor expenditure in Mackay grew by 16.7% on average over the three years to September 2019 upto \$519.2m, reflecting annual visitation which grew by 13.8% over the same period to 1.1m and growth in spend per night (up 2.1% on average to \$119 per night). Business visitation accounts for 59% of domestic travel to the Mackay region and it grew by 21.7% on average over the past three years to a record 652,000 visitors. Over this period, holiday visitation grew by 4.5% on average to 193,000 and VFR travel grew by 6.7% on average to 192,000. Domestic visitation to the Mackay region is predominantly intrastate, which grew by 14.5% on average to 962,000 visitors. Interstate travel grew by 9.1% on average over the past three years to 134,000 visitors.

Outback

Overnight visitor expenditure in the Outback grew by 11.8% on average over the three years to September 2019 to \$676.5m on the back of visitation which grew by 8.6% on average over the same period to 1.1m and ALoS which grew by 8.7% on average over this period to 5.3 nights. Growth in visitation was due to business travel which makes up 54% of the Outback market. Business visitation grew by 25.5% on average over the past three years to a record 581,000, while holiday visitation was steady (down 0.3%) at 300,000 and VFR decreased 5.4% on average to 170,000. Intrastate visitation grew by 10.1% on average over the past three years to a record 863,000, while the interstate market grew by 3.6% on average over the same period to 215,000.



Intrastate visitation

	Visitors	Annual change
Total intrastate	17,862,000	14.1%
Brisbane	4,547,000	7.5%
Gold Coast	1,999,000	18.9%
Sunshine Coast	2,928,000	10.9%
SQC	1,914,000	19.6%
SGBR	2,049,000	16.5%
Townsville	1,100,000	5.2%
TNQ	1,431,000	9.3%

	Visitors	3-yr trend
Fraser Coast	617,000	11.6%
Mackay	962,000	14.5%
Outback	863,000	10.1%
Whitsundays	399,000	13.9%

Interstate visitation

	Visitors	Annual change
Total interstate	7,842,000	12.9%
Brisbane	3,392,000	17.7%
Gold Coast	2,125,000	9.1%
Sunshine Coast	1,045,000	27.3%
SQC	431,000	20.7%
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TNQ	757,000	7.0%

	Visitors	3-yr trend
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Outback	215,000	3.6%
Whitsundays	248,000	-0.8%

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State expenditure comparison

	Expenditure	Annual change	Share of expenditure	Spend per visitor
Total Australia	\$79,115.6m	13.3%	100%	\$684
Queensland	\$19,038.5m	9.4%	24.1%	\$741
New South Wales	\$23,166.2m	12.6%	29.3%	\$604
Victoria	\$16,490.0m	11.5%	20.8%	\$560
Other States	\$17,699.3m	21.9%	22.4%	\$756

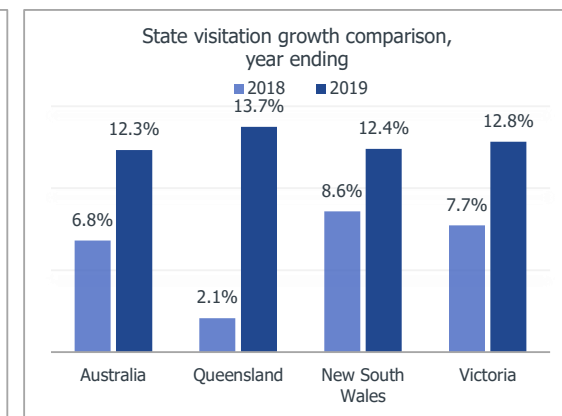
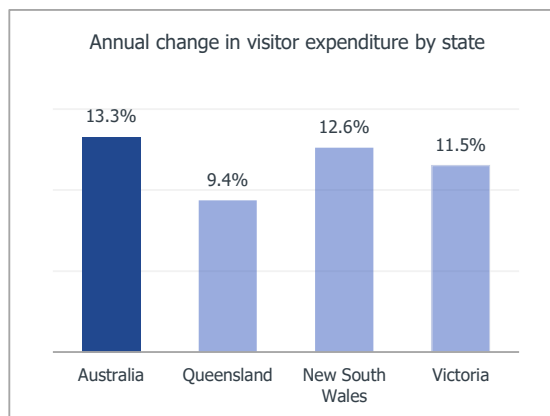
State visitation comparison

	Visitors	Annual Change	Avg stay	Annual # change
Total Australia	115,689,000	12.3%	3.5	0.0
Queensland	25,704,000	13.7%	4.0	-0.1
New South Wales	38,333,000	12.4%	3.1	0.0
Victoria	29,428,000	12.8%	2.8	-0.1
Other States	26,067,000	11.4%	4.1	0.1

Total holiday	45,864,000	9.9%	3.8	0.0
Queensland	9,828,000	8.6%	4.4	-0.1
New South Wales	14,675,000	8.2%	3.4	0.0
Victoria	12,423,000	9.8%	2.9	-0.1
Other States	10,485,000	13.1%	4.2	0.0

Total VFR	39,340,000	12.4%	3.2	0.0
Queensland	8,765,000	16.7%	3.3	-0.1
New South Wales	13,941,000	17.8%	3.0	0.0
Victoria	10,139,000	11.2%	2.8	0.0
Other States	7,146,000	0.9%	3.6	0.0

Total business	26,382,000	17.1%	3.4	0.1
Queensland	6,234,000	24.4%	3.7	-0.2
New South Wales	8,081,000	11.8%	2.6	-0.1
Victoria	5,693,000	19.4%	2.5	0.0
Other States	7,169,000	20.0%	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.

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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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