

Domestic Tourism Snapshot

Year ending March 2021

Domestic overnight visitors within Australia

	Visitors	Annual change ¹	Change vs YE Dec 2019	Avg stay ²	Annual # change
Total Australia³	72,805,000	-35.2%	-38.0%	3.9	0.3
Holiday	31,330,000	-28.0%	-32.2%	3.8	0.0
VFR ⁴	24,807,000	-35.2%	-37.9%	3.4	0.2
Business	13,374,000	-49.0%	-50.5%	4.3	0.8

Intrastate	62,208,000	-20.1%	-23.6%	3.4	0.4
Holiday	27,943,000	-12.7%	-17.9%	3.5	0.5
VFR ⁴	20,306,000	-25.5%	-28.5%	2.7	0.3
Business	10,789,000	-25.0%	-26.8%	4.0	0.5

Interstate	11,604,000	-68.4%	-69.7%	6.1	1.3
Holiday	3,739,000	-70.1%	-71.7%	5.6	0.0
VFR ⁴	4,656,000	-59.2%	-61.0%	6.1	1.3
Business	2,781,000	-77.0%	-77.9%	5.4	1.8

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual change ¹	Change vs YE Dec 2019
Total Australia⁵	\$45,650.0m	-42.0%	-43.4%
Holiday ⁶	\$23,864.8m	-27.7%	-28.8%
VFR ⁶	\$7,382.2m	-40.1%	-41.3%
Business ⁶	\$6,828.6m	-53.3%	-55.3%

FRASER ISLAND (K'GARU), FRASER COAST



Domestic tourism in the time of COVID-19

The year ending March 2021 (i.e. 1 April 2020 – 31 March 2021) reflects the full year impacts of COVID-19 that occurred since the border closures, lockdowns and restrictions that began in late March 2020.

A total of 72.8m domestic overnight trips were taken in Australia in the year ending March 2021, a decrease of 35.2 per cent year on year. These trips generated \$45.7b in expenditure, down by 42.0 per cent annually.

The decrease in national overnight visitor expenditure (OVE) occurred across all visitor purposes. Business OVE decreased the most (down 53.3 per cent to \$6.8b), while visiting friends and relatives (VFR) OVE was down 40.1 per cent to \$7.4b and holiday OVE was down 27.7 per cent to \$23.9b. Similarly, business visitation decreased by 49.0 per cent to 13.4m, VFR visitation decreased by 35.2 per cent to 24.8m and holiday visitation decreased by 28.0 per cent to 31.3m.

At the state level, the decrease in domestic OVE in Queensland in the year ending March 2021 (down 36.2 per cent to \$12.1b) was shallower than the national average, so Queensland gained market share (up 2.4 percentage points (ppt) to 26.5 per cent). However, Queensland lost holiday OVE market share (down 0.8ppt to 26.0 per cent) as Queensland's holiday OVE decreased by 29.8 per cent over the year to \$6.2b. This can be attributed to a relatively high share of Queensland's holiday visitation coming from interstate in the pre-COVID period and interstate visitors typically spend more per trip than intrastate visitors.

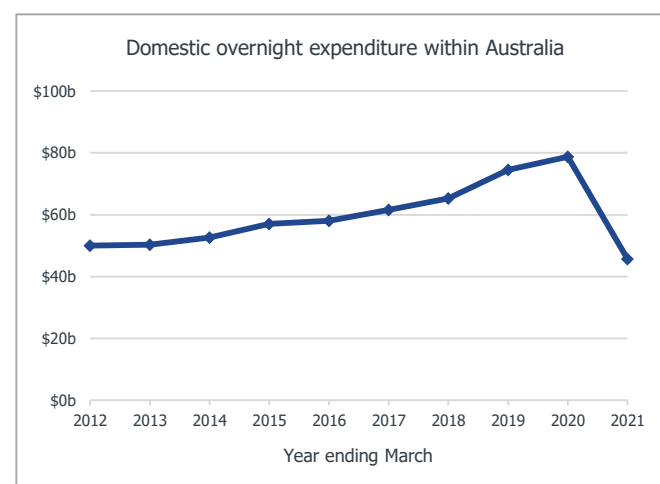
Reflecting various state border restrictions over the year, nationally interstate travel (down 68.4 per cent to 11.6m) decreased by more than intrastate travel (down 20.1 per cent to 62.2m). This was also reflected in OVE, with intrastate OVE down 17.1 per cent to \$35.0b and interstate OVE down 70.8 per cent to \$10.7b.

March quarter performance

March saw continued improvement relative to previous quarters, although there were intermittent restrictions put in place due to outbreaks. Nationally, holiday visitation was up by 19.1 per cent compared to the March quarter 2020 and VFR visitation was steady (up 0.1 per cent) over the year. However, holiday visitation was down 5.9 per cent compared to March 2019 (pre-COVID-19) and VFR visitation was down 16.8 per cent. Business visitation continues to be the slowest to recover, down 30.7 per cent over the year and down 40.6 per cent compared to March 2019.

Mar quarter 2021 overnight visitors in Australia

	Visitors	Change vs Mar qtr 2020	Change vs Mar qtr 2019
Total Australia	24,612,000	1.2%	-16.5%
Holiday	12,096,000	19.1%	-5.9%
VFR ⁴	8,190,000	0.1%	-16.8%
Business	3,453,000	-30.7%	-40.6%



KINGFISHER BAY RESORT, FRASER COAST

Domestic Tourism Snapshot

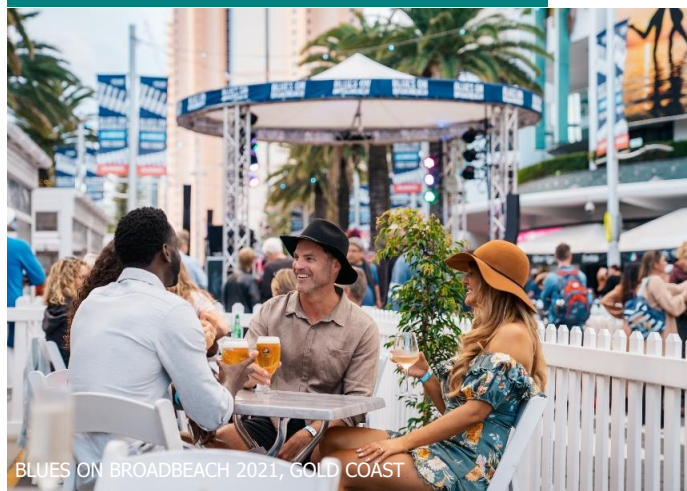
Year ending March 2021

Domestic overnight visitors in Queensland

	Visitors	Annual change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Queensland	17,087,000	-31.1%	-34.1%	4.0	0.1
Holiday	6,848,000	-28.3%	-31.6%	4.1	-0.3
VFR	5,851,000	-32.1%	-34.6%	3.5	0.0
Business	3,476,000	-39.9%	-43.3%	4.3	0.6
Intrastate	14,778,000	-13.7%	-16.9%	3.5	0.3
Holiday	6,043,000	-5.0%	-9.2%	3.6	0.5
VFR	4,929,000	-20.3%	-23.6%	2.8	0.2
Business	2,974,000	-21.5%	-24.4%	4.1	0.1
Interstate	2,309,000	-70.0%	-71.6%	7.2	1.6
Holiday	805,000	-74.8%	-76.0%	7.4	0.6
VFR	921,000	-62.2%	-63.0%	7.0	1.4
Business	502,000	-74.8%	-77.1%	5.4	2.3

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change	Change vs YE Dec 2019
Total Queensland ⁵	\$12,075.9m	-36.2%	-37.9%
Holiday ⁶	\$6,202.4m	-29.8%	-29.6%
VFR ⁶	\$1,813.4m	-36.7%	-37.2%
Business ⁶	\$1,757.5m	-40.9%	-46.6%



BLUES ON BROADBEACH 2021, GOLD COAST

COVID-19's effects on Queensland tourism

In Queensland over the year ending March 2021, domestic OVE decreased by 36.2 per cent year-on-year to \$12.1b, on the back of visitation decreasing by 31.1 per cent to 17.1m.

By purpose, business OVE decreased the most (down 40.9 per cent over the year to \$1.8b) on the back of a 39.9 per cent decrease in business visitation (to 3.5m). VFR OVE decreased by 36.7 per cent to \$1.8b due to a 32.1 per cent decrease in visitation to 5.9m. Holiday OVE decreased by 29.8 per cent to \$6.2b due to a 28.3 per cent decrease in visitation to 6.8m.

Record intrastate holiday spend continues

Queenslanders continue to spend more than ever before while enjoying their home state with intrastate holiday spend reaching a record high (up 19.6 per cent) to \$4.8b. However, spend for the other purposes of intrastate travel decreased, so total intrastate spend was down 7.1 per cent to \$9.3b and intrastate visitation was down 13.7 per cent to 14.8m. The decrease in intrastate market was dwarfed by the decrease in interstate spend (down 68.7 per cent to \$2.8b) and visitation (down 70.0 per cent to 2.3m).

Queensland's path to recovery

Total OVE in Queensland in the March quarter 2021 totalled \$4.2b, up 7.6 per cent compared to March quarter 2020, but down 4.7 per cent compared to March 2019 (pre-COVID). Queensland was recovering faster than the other states and so was performing better than the national average compared to both March 2020 (national OVE was steady) and March 2019 (national OVE was down 9.7 per cent). Intrastate OVE grew by 16.7 per cent to \$2.6b compared to the same period in 2020 and was up by 5.8 per cent compared to March quarter 2019. Interstate OVE was down 4.6 per cent over the year and down 18.1 per cent compared to March 2019.

In the March quarter 2021, business OVE decreased both compared to March quarter 2020 (down 14.9 per cent) and compared to the pre-COVID March 2019 period (down 50.3 per cent), while VFR (up 9.5 per cent compared to 2020 and up 5.4 per cent compared to 2019) and holiday OVE (up 19.1 per cent compared to 2020 and up 20.0 per cent compared to 2019) increased against both prior years.

Regional results

A multi-speed recovery continues to be evident among Queensland's tourism regions in the year ending March 2021 with interstate and/or business reliant regions like Brisbane (OVE down 50.2 per cent), the Gold Coast (OVE down 47.6 per cent), Tropical North Queensland (OVE down 39.3 per cent) and Townsville (OVE down 37.8 per cent) performing worse in the year ending March 2021 than more intrastate reliant regions such as Southern Queensland Country (down 7.5 per cent) and Southern Great Barrier Reef (SGBR) (down 9.4 per cent). Looking at quarterly data we see that visitation was up across most regions over the year but still down across most regions compared to March quarter 2019.

Mar quarter 2021 overnight visitors in Australia

	Visitors	Change vs Mar qtr 2020	Change vs Mar qtr 2019
Total Queensland	5,137,000	4.8%	-14.5%
Holiday	2,292,000	22.1%	-1.9%
VFR ⁴	1,814,000	4.7%	-11.8%
Business	811,000	-23.1%	-42.0%
Overnight Visitor Expenditure	\$4,201.4m	7.6%	-4.7%

Dec Quarter 2021 Queensland Interstate vs Intrastate

	Visitors	Change vs Mar qtr 2020	Change vs Mar qtr 2019
Visitation			
Interstate	1,175,000	-9.2%	-32.3%
Intrastate	3,963,000	9.8%	-7.3%
Overnight Visitor Expenditure			
Interstate	\$1,583.7m	-4.6%	-18.1%
Intrastate	\$2,617.7m	16.7%	5.8%

March Quarter 2021 Domestic OVE Change vs March 2019



Domestic Tourism Snapshot

Year ending March 2021



Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	17,087,000	-31.1%	-34.1%	6,848,000	-28.3%	-31.6%
Brisbane	4,631,000	-41.1%	-43.4%	1,352,000	-38.8%	-42.8%
Gold Coast	2,445,000	-37.7%	-41.8%	1,231,000	-39.5%	-43.1%
Sunshine Coast	3,137,000	-17.9%	-22.5%	1,862,000	-9.2%	-15.7%
SQC ⁷	1,773,000	-17.7%	-20.5%	497,000	-17.5%	-18.7%
SGBR ⁸	1,830,000	-19.0%	-21.0%	660,000	-12.6%	-10.3%
Townsville	731,000	-40.4%	-43.7%	279,000	-29.7%	-30.8%
TNQ ⁹	1,487,000	-31.9%	-32.9%	715,000	-39.1%	-37.8%

	Visitors ¹	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	579,000	-6.3%	294,000	-10.4%
Mackay	874,000	-0.7%	137,000	-5.7%
Outback	855,000	-3.0%	244,000	-7.5%
Whitsundays	528,000	-1.3%	353,000	3.7%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$12,075.9m	-36.2%	-37.9%	100%	\$707
Brisbane	\$2,525.0m	-50.2%	-53.1%	21%	\$545
Gold Coast	\$1,890.9m	-47.6%	-48.8%	16%	\$773
Sunshine Coast	\$2,041.4m	-24.2%	-25.6%	17%	\$651
SQC	\$631.6m	-7.5%	-13.5%	5%	\$356
SGBR	\$1,037.8m	-9.4%	-13.3%	9%	\$567
Townsville	\$486.8m	-37.8%	-38.4%	4%	\$666
TNQ	\$1,559.3m	-39.3%	-37.8%	13%	\$1,048

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$330.2m	-7.6%	3%	\$570
Mackay	\$400.4m	2.2%	3%	\$458
Outback	\$517.2m	-6.4%	4%	\$605
Whitsundays	\$631.9m	7.2%	5%	\$1,196

Mar Quarter 2021 overnight visitors and nights, by region

	Visitors	Change vs Mar qtr 2020	Change vs Mar qtr 2019	Nights	Change vs Mar qtr 2020	Change vs Mar qtr 2019
Total Queensland	5,137,000	4.8%	-14.5%	21,822,000	13.4%	-7.6%
Brisbane	1,539,000	0.3%	-16.9%	5,018,000	6.8%	-11.0%
Gold Coast	975,000	29.7%	-5.5%	3,525,000	13.9%	-24.2%
Sunshine Coast	933,000	12.4%	-11.9%	3,984,000	12.0%	7.1%
SQC	481,000	18.2%	-0.1%	1,625,000	65.6%	17.1%
SGBR	529,000	8.6%	-3.1%	1,933,000	21.6%	-4.0%
Townsville	167,000	-28.2%	-45.1%	923,000	36.6%	-4.7%

Brisbane

Domestic OVE decreased by 50.2 per cent to \$2.5b on the back of visitation decreasing by 41.1 per cent to 4.6m visitors and spend per night decreasing by 18.5 per cent to \$182 per night in the year ending March 2021. For the full year, the decline in visitation was most pronounced for business visitors (down 59.0 per cent to 785,000) followed by holiday visitation (down 38.8 per cent to 1.4m) and VFR visitation (down 37.1 per cent to 2.0m). Interstate visitation (down 70.8 per cent to 976,000) experienced a larger decrease than intrastate visitation (down 19.2 per cent to 3.7m). Visitation from Victoria was down 77.1 per cent to 194,000, visitation from Sydney was down 82.8 per cent to 177,000 and visitation from regional New South Wales was down 52.9 per cent to 400,000. Among intrastate markets, intraregional travel decreased 15.5 per cent to 1.2m, visitation from the Sunshine Coast decreased 25.1 per cent to 635,000, but visitation from the Gold Coast grew 11.7 per cent to a record 639,000. In the March quarter 2021 visitation was steady (up 0.3 per cent) compared to the March quarter 2020, but was down 16.9 per cent compared to the pre-COVID March quarter 2019.

Fraser Coast

Annual OVE was \$330.2m in the year ending March 2021, which is down 7.6 per cent annually on average over the past three years. This reflected visitation which decreased 6.3 per cent annually over the past three years to 579,000 visitors. Holiday visitation, which makes up 51 per cent of visitors to the region, decreased by 10.4 per cent on average over the past three years to 294,000, while VFR (which accounts for 34 per cent of visitation) decreased by 3.5 per cent on average over the same period to 199,000. Intrastate visitation decreased 1.1 per cent on average to 523,000 while interstate visitation was not publishable due to small visitor survey sample size.

Whitsundays

Annual OVE grew by 7.2 per cent annually on average over the past three years to \$631.9m, with spend per visitor growing by 9.7 per cent on average over the period to \$1,196 per visitor while visitation decreased slightly (down 1.3 per cent on average annually to 528,000). This reflects in part recovery from Cyclone Debbie in 2017 and a number of resorts coming back online, but also reflects a record number of intrastate visitors (476,000 up 7.4 per cent on average annually). These intrastate visitors were increasingly likely to stay in 4-5 star accommodation. Holiday visitation accounts for 67 per cent of domestic visitation to the region, growing by 3.7 per cent on average over the past three years to 353,000.

Gold Coast

OVE decreased 47.6 per cent to \$1.9b as visitation decreased by 37.7 per cent to 2.4m and spend per visitor decreased 16.0 per cent per cent to \$773 per visitor. The decrease in visitation was most pronounced among business visitors (down 46.7 per cent to 245,000), followed by holiday visitors (down 39.5 per cent to 1.2m) and VFR visitation (down 33.5 per cent to 870,000). The decrease was more pronounced for interstate visitors (down 67.3 per cent to 682,000), with visitation from Victoria decreasing by 80.1 per cent to 120,000, visitation from Sydney decreasing 75.1 per cent to 166,000 and regional New South Wales visitation down 43.2 per cent to 311,000. Intrastate visitation decreased 4.0 per cent to 1.8m, but visitation from Brisbane grew by 1.5 per cent to 1.3m. In the March quarter 2021 visitation was up 29.7 per cent compared March quarter 2020 and was only down 5.5 per cent compared to the pre-COVID March quarter 2019.

Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	14,778,000	-13.7%	-16.9%
Brisbane	3,655,000	-19.2%	-20.3%
Gold Coast	1,762,000	-4.0%	-13.0%
Sunshine Coast	2,767,000	1.4%	-5.6%
SQC	1,609,000	-8.1%	-10.3%
SGBR	1,727,000	-13.2%	-14.5%
Townsville	663,000	-34.9%	-37.7%
TNQ	1,269,000	-11.5%	-15.5%

	Visitors	3-yr trend
Fraser Coast	523,000	-1.1%
Mackay	818,000	2.4%
Outback	759,000	0.1%
Whitsundays	476,000	7.4%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	2,309,000	-70.0%	-71.6%
Brisbane	976,000	-70.8%	-72.8%
Gold Coast	682,000	-67.3%	-68.6%
Sunshine Coast	370,000	-66.1%	-66.9%
SQC	164,000	-59.4%	-62.4%
SGBR	102,000	-62.0%	-65.4%
Townsville	np	np	np
TNQ	219,000	-70.8%	-69.5%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	np	np
Outback	np	np
Whitsundays	np	np



MOUNT BARNEY LODGE, BRISBANE

Domestic Tourism Snapshot

Year ending March 2021



Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	17,087,000	-31.1%	-34.1%	6,848,000	-28.3%	-31.6%
Brisbane	4,631,000	-41.1%	-43.4%	1,352,000	-38.8%	-42.8%
Gold Coast	2,445,000	-37.7%	-41.8%	1,231,000	-39.5%	-43.1%
Sunshine Coast	3,137,000	-17.9%	-22.5%	1,862,000	-9.2%	-15.7%
SQC ^C	1,773,000	-17.7%	-20.5%	497,000	-17.5%	-18.7%
SGBR ^R	1,830,000	-19.0%	-21.0%	660,000	-12.6%	-10.3%
Townsville	731,000	-40.4%	-43.7%	279,000	-29.7%	-30.8%
TNQ ^P	1,487,000	-31.9%	-32.9%	715,000	-39.1%	-37.8%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	579,000	-6.3%	294,000	-10.4%
Mackay	874,000	-0.7%	137,000	-5.7%
Outback	855,000	-3.0%	244,000	-7.5%
Whitsundays	528,000	-1.3%	353,000	3.7%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$12,075.9m	-36.2%	-37.9%	100%	\$707
Brisbane	\$2,525.0m	-50.2%	-53.1%	21%	\$545
Gold Coast	\$1,890.9m	-47.6%	-48.8%	16%	\$773
Sunshine Coast	\$2,041.4m	-24.2%	-25.6%	17%	\$651
SQC	\$631.6m	-7.5%	-13.5%	5%	\$356
SGBR	\$1,037.8m	-9.4%	-13.3%	9%	\$567
Townsville	\$486.8m	-37.8%	-38.4%	4%	\$666
TNQ	\$1,559.3m	-39.3%	-37.8%	13%	\$1,048

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$330.2m	-7.6%	3%	\$570
Mackay	\$400.4m	2.2%	3%	\$458
Outback	\$517.2m	-6.4%	4%	\$605
Whitsundays	\$631.9m	7.2%	5%	\$1,196

Mar Quarter 2021 intrastate and interstate visitors, by region

	Intrastate	Change vs Mar qtr 2020	Change vs Mar qtr 2019	Interstate	Change vs Mar qtr 2020	Change vs Mar qtr 2019
Total Queensland	3,963,000	9.8%	-7.3%	1,175,000	-9.2%	-32.3%
Brisbane	1,100,000	11.3%	4.4%	439,000	-19.6%	-45.0%
Gold Coast	585,000	71.1%	9.8%	390,000	-4.9%	-21.8%
Sunshine Coast	708,000	15.6%	-13.3%	225,000	3.2%	-7.2%
SQC	401,000	15.2%	2.7%	np	np	np
SGBR	479,000	7.3%	0.1%	np	np	np
Townsville	132,000	-39.6%	-50.3%	np	np	np

Sunshine Coast

Sunshine Coast's OVE decreased by 24.2 per cent to \$2.0b, as visitation decreased by 17.9 per cent to 3.1m and average length of stay decreased by 0.3 nights to 3.5 nights. Over the year, business visitation decreased the most (down 32.8 per cent to 204,000), while VFR visitation decreased 29.7 per cent to 969,000 and holiday visitation decreased 9.2 per cent to 1.9m. The decrease was more pronounced for interstate visitation (down 66.1 per cent to 370,000) which includes visitation from New South Wales which was down 66.7 per cent to 175,000. Intrastate visitation grew by 1.4 per cent over the year to 2.8m, with visitation from Brisbane growing 10.8 per cent to 1.8m. In the March quarter 2021, visitation to the Sunshine Coast was up by 12.4 per cent compared to the March quarter 2020, but was down 11.9 per cent compared to the pre-COVID March quarter 2019.

Tropical North Queensland (TNQ)

OVE decreased by 39.3 per cent to \$1.6b on the back of visitation decreasing by 31.9 per cent to 1.5m and average spend per night decreasing by 7.7 per cent to \$214 per night. Holiday visitation decreased by 39.1 per cent to 715,000, VFR visitation decreased by 36.5 per cent to 320,000 and business visitation decreased by 16.5 per cent to 373,000. The decrease was more pronounced for interstate visitation (down 70.8 per cent to 219,000). Intrastate visitation decreased by 11.5 per cent to 1.3m, with intraregional travel down 9.1 per cent to 628,000. In the March quarter 2021, visitation to TNQ was up by 11.2 per cent compared to the March quarter 2020 and up by 1.3 per cent compared to the pre-COVID March quarter 2019.

Townsville

OVE decreased 37.8 per cent to \$486.8m, reflecting a 40.4 per cent decrease in visitation to 731,000. This decrease is largely due to the business and interstate markets. Business visitation was down 47.4 per cent to 177,000 and VFR visitation was down 43.2 per cent to 210,000 while holiday visitation was only down 29.7 per cent to 279,000. While interstate visitation did not have a large enough sample to publish, intrastate visitation decreased by 34.9 per cent to 663,000. The largest intrastate market is intraregional travel which decreased 37.4 per cent to 231,000. In the March quarter 2021 visitation to Townsville was down 28.2 per cent compared to March quarter 2020 and 45.1 per cent lower than the pre-COVID March quarter 2019.

Southern Great Barrier Reef (SGBR)

OVE decreased 9.4 per cent to \$1.0b on the back of visitation decreasing 19.0 per cent to 1.8m. Business visitation decreased by 33.6 per cent to 468,000, VFR visitation decreased by 21.0 per cent to 528,000 and holiday visitation decreased 12.6 per cent to 660,000. Intrastate visitation decreased by 13.2 per cent to 1.7m, including a 20.4 per cent decrease in intraregional visitation to 504,000 and a 11.8 per cent decrease in visitation from Brisbane to 534,000. In the March quarter 2021, visitation to the region increased by 8.6 per cent compared to the March quarter 2020 and only decreased by 3.1 per cent compared to the pre-COVID March quarter 2019.

Southern Queensland Country (SQC)

OVE decreased by 7.5 per cent to \$631.6m, reflecting a 17.7 per cent decrease in visitation to 1.8m. VFR visitation decreased by 22.7 per cent to 681,000, holiday visitation decreased by 17.5 per cent to 497,000 and business visitation decreased by 14.6 per cent to 448,000. The decrease in interstate visitation was sharper, down 59.4 per cent to 164,000, including a 52.9 per cent reduction in visitation from New South Wales to 119,000. Intrastate visitation decreased by 8.1 per cent to 1.6m and included a 11.6 per cent reduction in visitation from Brisbane to 731,000 and a 24.3 per cent reduction in interregional travel to 317,000. Visitation in the March quarter 2021 was 18.2 per cent higher than visitation in the March quarter 2020 and steady (down 0.1 per cent) compared to the pre-COVID March quarter 2019.

Mackay

Annual OVE in Mackay was \$400.4m, growing by 2.2 per cent on average over the three years to March 2021, reflecting that visitation was steady (down 0.7 per cent) on average at 874,000 and spend per night grew by 5.0 per cent on average over the three years to \$106 per night. Business travellers grew by 2.0 per cent on average over the past three years to 530,000 and accounted for 61 per cent of the region's domestic overnight visitation. Holiday (down 5.7 per cent on average to 137,000) and VFR (down 7.7 per cent on average to 119,000) both decreased. The region's visitation is predominantly from the intrastate market (94 per cent of trips), which grew on average by 2.4 per cent over the past three years to 818,000 visitors.

Outback Queensland

OVE in Outback Queensland decreased by 6.4 per cent on average over the past three years to \$517.2m due to visitation decreasing by 3.0 per cent on average to 855,000 and spend per night decreasing 8.6 per cent on average to \$118 per night. Holiday visitation decreased by 7.5 per cent on average over the past three years to 244,000 while business visitation decreased by 3.3 per cent on average to 367,000 and VFR visitation decreased by 2.6 per cent on average to 159,000. Intrastate visitation accounts for 89 per cent of visitation to Outback Queensland and was steady (up 0.1 per cent) at 759,000. On the other hand, interstate visitation was down 14.3 per cent on average over the past three years to 96,000.

Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	14,778,000	-13.7%	-16.9%
Brisbane	3,655,000	-19.2%	-20.3%
Gold Coast	1,762,000	-4.0%	-13.0%
Sunshine Coast	2,767,000	1.4%	-5.6%
SQC	1,609,000	-8.1%	-10.3%
SGBR	1,727,000	-13.2%	-14.5%
Townsville	663,000	-34.9%	-37.7%
TNQ	1,269,000	-11.5%	-15.5%

	Visitors	3-yr trend
Fraser Coast	523,000	-1.1%
Mackay	818,000	2.4%
Outback	759,000	0.1%
Whitsundays	476,000	7.4%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	2,309,000	-70.0%	-71.6%
Brisbane	976,000	-70.8%	-72.8%
Gold Coast	682,000	-67.3%	-68.6%
Sunshine Coast	370,000	-66.1%	-66.9%
SQC	164,000	-59.4%	-62.4%
SGBR	102,000	-62.0%	-65.4%
Townsville	np	np	np
TNQ	219,000	-70.8%	-69.5%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	np	np
Outback	np	np
Whitsundays	np	np



MOUNT NGUNGUN, SUNSHINE COAST

Domestic Tourism Snapshot

Year ending March 2021



State expenditure comparison

	Expenditure	Annual change	Change vs YE Dec 2019	Share of expenditure	Spend per visitor
Total Australia	\$45,650.0m	-42.0%	-43.4%	100.0%	\$627
Queensland	\$12,075.9m	-36.2%	-37.9%	26.5%	\$707
New South Wales	\$14,601.6m	-35.8%	-38.3%	32.0%	\$586
Victoria	\$6,479.6m	-61.4%	-61.8%	14.2%	\$485
Other States	\$12,492.9m	-38.4%	-39.4%	27.4%	\$661

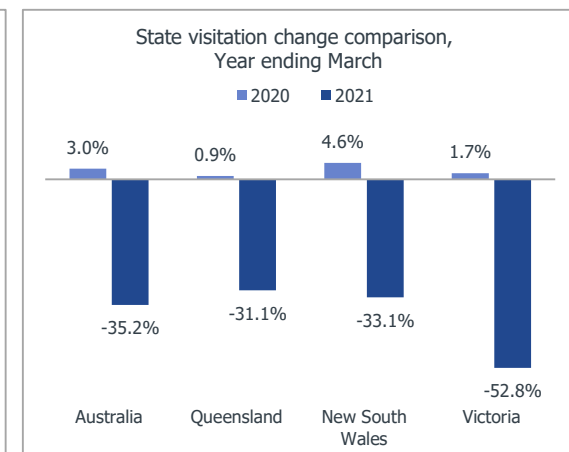
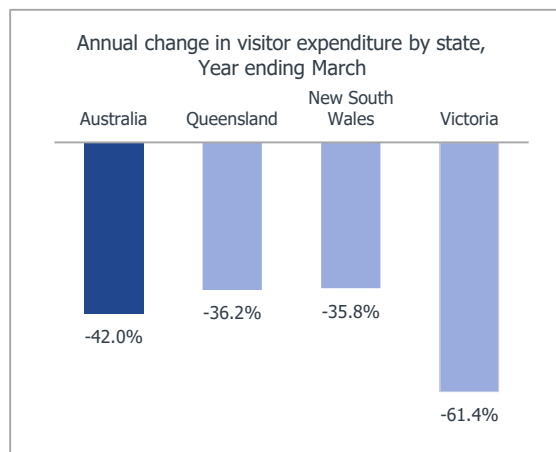
State visitation comparison

	Visitors	Annual Change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Australia	72,805,000	-35.2%	-38.0%	3.9	0.3
Queensland	17,087,000	-31.1%	-34.1%	4.0	0.1
New South Wales	24,920,000	-33.1%	-36.1%	3.5	0.3
Victoria	13,351,000	-52.8%	-55.1%	3.4	0.6
Other States	18,906,000	-26.8%	-29.4%	4.2	0.1

Total holiday	31,330,000	-28.0%	-32.2%	3.8	0.0
Queensland	6,848,000	-28.3%	-31.6%	4.1	-0.3
New South Wales	10,414,000	-24.6%	-29.6%	3.6	0.2
Victoria	5,996,000	-49.5%	-51.8%	3.4	0.4
Other States	8,517,000	-13.9%	-19.4%	3.9	-0.3

Total VFR	24,807,000	-35.2%	-37.9%	3.4	0.2
Queensland	5,851,000	-32.1%	-34.6%	3.5	0.0
New South Wales	9,027,000	-32.4%	-35.8%	3.1	0.2
Victoria	4,811,000	-50.3%	-53.2%	3.2	0.5
Other States	5,352,000	-26.7%	-27.1%	3.6	0.0

Total Business	13,374,000	-49.0%	-50.5%	4.3	0.8
Queensland	3,476,000	-39.9%	-43.3%	4.3	0.6
New South Wales	4,221,000	-49.0%	-49.4%	3.4	0.5
Victoria	1,838,000	-67.0%	-68.4%	3.1	0.5
Other States	4,207,000	-42.7%	-44.1%	5.4	0.9



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 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 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:

By using this information, you acknowledge that this information is provided by TEQ to you without any responsibility on behalf of TEQ. You agree to release and indemnify TEQ for any loss or damage that you may suffer as a result of your reliance on this information. TEQ does not represent or warrant that this information is correct, complete or suitable for the purpose for which you wish to use it. The information is provided to you on the basis that you will use your own skill and judgement and make your own enquiries to independently evaluate, assess and verify the information's correctness, completeness and usefulness to you before you rely on the information.

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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