

Domestic Tourism Snapshot

Year ending December 2018

Domestic overnight visitors within Australia

	Visitors	Annual change ¹	Avg stay ²	Annual # change
Total Australia³	105,600,000	8.6%	3.6	0.0
Holiday	42,364,000	7.6%	3.8	-0.1
VFR ⁴	35,507,000	8.2%	3.2	-0.1
Business	23,865,000	13.8%	3.4	0.2
Intrastate	73,176,000	8.7%	2.9	0.0
Holiday	31,111,000	8.2%	3.0	-0.1
VFR	25,241,000	10.4%	2.5	0.0
Business	12,975,000	10.6%	3.4	0.2
Interstate	34,361,000	7.8%	4.7	-0.1
Holiday	12,152,000	5.8%	5.4	-0.1
VFR	10,574,000	3.1%	4.9	-0.1
Business	11,185,000	17.9%	3.3	0.1

Records continue to tumble

Australians took a record 105.6m domestic overnight trips in the year ending December 2018, representing 8.6% growth year on year. All states and territories except the NT and ACT saw record high levels of domestic visitation.

Subsequently domestic visitor expenditure also reached record levels, growing 12.7% to \$72.7bn. NT was the only state/territory which did not reach record levels of domestic visitor spending. Visitor expenditure in QLD grew above the national average reaching \$18.3bn (+15.6%).

A record for all reasons

The growth in domestic visitors was spread across the main traveller segments: holiday, business and visiting friends and relatives (VFR).

Business travel experienced the strongest growth, with the number of trips increasing by 13.8% to a record 23.9m. These visitors increased their spend per night by 4.2% to \$168 per visitor, and nights grew 19.8%, resulting in expenditure growth of 24.8% to reach a record \$13.5bn. Business travel has been supported by improving business conditions in Australia. Company profits have achieved record highs in the past year, supported by high levels for commodity prices in the mining sector (Source: ABS).

Holiday visitation grew 7.6% to a record 42.4m visitors, who spent a record \$30.4bn, up 9.0% year on year.

Travel to visit friend and relatives (VFR) grew 8.2% year on year to a record 35.5m visitors. These visitors spent 11.5% more over the year, driving spend to a record \$11.4bn.

Intrastate vs. interstate

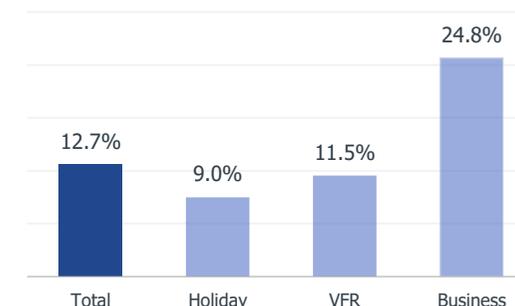
Both interstate and intrastate travel grew nationally. Intrastate travel grew slightly faster (up 8.7% to a record 73.2m), than interstate (up 7.8% to a record 34.4m). However, interstate business travel was particularly strong, growing 17.9% to a record 11.2m trips, vs. 10.6% growth in intrastate business travel.



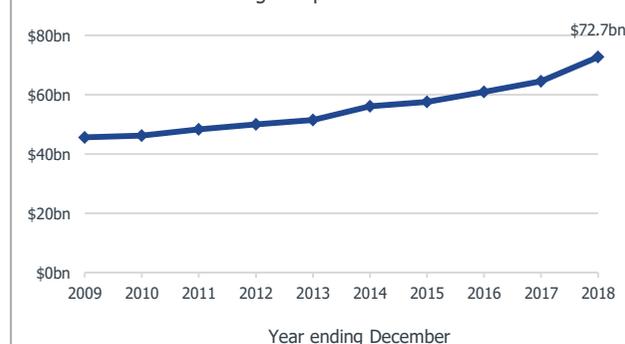
Domestic overnight visitor expenditure in Australia

	Expenditure	Annual change ¹
Total Australia⁵	\$72,705.5m	12.7%
Holiday ⁶	\$30,407.9m	9.0%
VFR ⁶	\$11,411.2m	11.5%
Business ⁶	\$13,497.5m	24.8%

Annual change in expenditure in Australia by purpose



Domestic overnight expenditure within Australia



Domestic Tourism Snapshot

Year ending December 2018



Domestic overnight visitors in Queensland

	Visitors	Annual change	Avg stay	Annual # change
Total Queensland	24,086,000	10.6%	3.9	0.0
Holiday	9,426,000	9.8%	4.4	-0.2
VFR	7,932,000	8.6%	3.4	0.0
Business	5,587,000	15.0%	3.7	0.4
Intrastate	17,005,000	12.1%	3.2	-0.1
Holiday	6,483,000	11.7%	3.2	-0.1
VFR	5,778,000	10.3%	2.6	0.0
Business	3,769,000	16.5%	3.8	0.1
Interstate	7,081,000	7.2%	5.8	0.1
Holiday	2,943,000	5.8%	7.0	-0.2
VFR	2,154,000	4.2%	5.5	0.0
Business	1,818,000	12.2%	3.6	0.8



Records continue for Queensland

Queensland set its thirteenth straight year-ending-quarter expenditure record, with domestic overnight expenditure reaching a record \$18.3bn, up 15.6% year on year. This places the state's growth above the national average of 12.7%.

This record spend came from a record 24.1m visitors to the state, up by 10.6% in the year ending December 2018. These visitors stayed in the state for a record 94.7m nights, that's 9.5% more nights than the same period a year ago.

Growth from all sectors

Record visitation and expenditure was reached across the main market segments of holiday and business.

Business travel growth was particularly strong. Business expenditure grew by 29.6% to a record \$3.2bn and business visitation grew by 15.0% to 5.6m. On top of the increased visitor numbers, business travellers increased their average length of stay by 0.4 nights over the year to 3.7 nights, and their spend per night increased by 1.7% to \$153 per night.

Holiday visitation increased by 9.8% to a record 9.4m visitors, with expenditure growing by 13.2% to a record \$8.2bn. This was driven by Queenslanders holidaying in their home state, which grew 11.7% to a record 6.5m trips, while interstate holiday visitation grew by 5.8% to 2.9m.

VFR expenditure also grew (by 10.7%) to \$2.6bn and visitation grew by 8.6% to a record 7.9m. Similar to holiday travel, the growth in VFR was driven by Queenslanders, up 10.3% to 5.8m trips, while interstate VFR grew 4.2% to 2.2m trips.

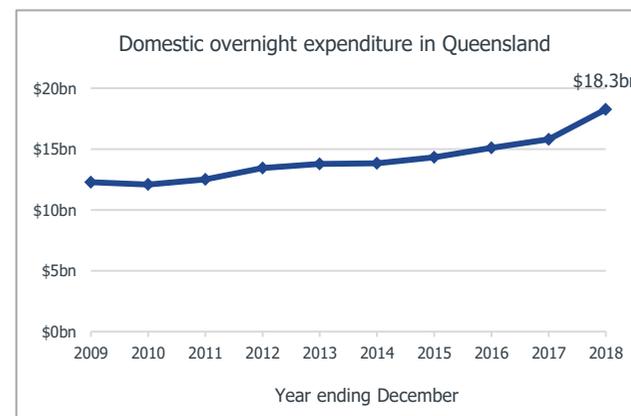
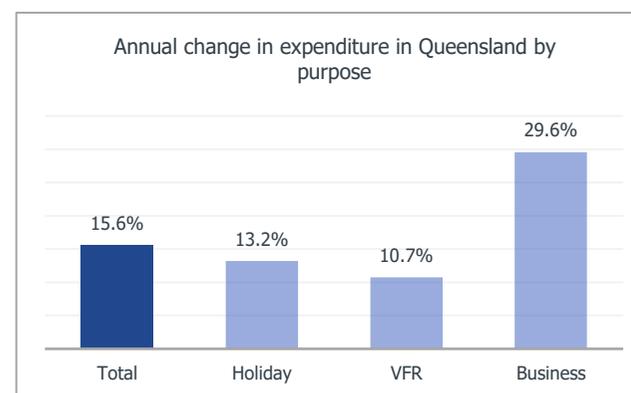
Regional highs

Seven of Queensland's tourism regions reached record levels of visitor expenditure in the year ending December 2018: Brisbane (\$4.6bn), Gold Coast (\$3.5bn), Sunshine Coast (\$2.4bn), Tropical North Queensland (\$2.4bn), Southern Queensland Country (\$795.8m), Mackay (\$540.2m) and Fraser Coast (\$444.2m).

These record levels of spend were accompanied by record high levels of visitation in all regions except the Outback.

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change
Total Queensland⁵	\$18,263.5m	15.6%
Holiday ⁶	\$8,161.0m	13.2%
VFR ⁶	\$2,643.8m	10.7%
Business ⁶	\$3,153.0m	29.6%



Domestic Tourism Snapshot

Year ending December 2018



Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	24,086,000	10.6%	9,426,000	9.8%
Brisbane	7,517,000	8.2%	2,164,000	10.8%
Gold Coast	3,795,000	7.2%	2,048,000	5.2%
Sunshine Coast	3,684,000	8.6%	2,003,000	8.2%
SQC ⁷	2,205,000	12.7%	586,000	-4.9%
SGBR ⁸	2,176,000	13.6%	755,000	14.4%
Townsville	1,378,000	28.3%	475,000	32.5%
TNQ ⁹	2,065,000	13.5%	1,058,000	11.0%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
Fraser Coast	772,000	9.5%	413,000	10.9%
Mackay	1,046,000	9.5%	220,000	6.8%
Outback	884,000	3.1%	312,000	7.4%
Whitsundays	651,000	11.8%	404,000	10.8%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$18,263.5m	15.6%	100%	\$758
Brisbane	\$4,629.7m	8.5%	25.3%	\$616
Gold Coast	\$3,517.7m	19.7%	19.3%	\$927
Sunshine Coast	\$2,385.2m	16.6%	13.1%	\$648
SQC	\$795.8m	17.6%	4.4%	\$361
SGBR	\$1,182.1m	19.1%	6.5%	\$543
Townsville	\$892.6m	15.2%	4.9%	\$648
TNQ	\$2,382.4m	17.0%	13.0%	\$1,154

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$444.2m	18.9%	2.4%	\$576
Mackay	\$540.2m	20.6%	3.0%	\$517
Outback	\$623.0m	6.7%	3.4%	\$705
Whitsundays	\$745.1m	15.2%	4.1%	\$1,145

* 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

The Brisbane region continued to see strong growth in domestic overnight visitor expenditure, reaching a record \$4.6bn up by 8.5% over the year ending December 2018. This was on the back of 8.2% growth in visitation, reaching a record 7.5m. Visitors average spend per night grew slightly (up 2.6% to \$212). Visitation was boosted by 10.8% growth in holiday visitors to a record 2.2m, while VFR (up 6.8% to a record 2.9m) and business travel (up 7.7% to a record 1.8m) both grew. The intrastate market accounted for the majority of the growth in visitors (up 13.9% to a record 4.6m), as the interstate market was steady at 2.9m visitors (up 0.3%).

Gold Coast

Domestic overnight expenditure in the Gold Coast region grew 19.7% to a record \$3.5bn in the year ending December 2018. The region welcomed a record 3.8m visitors up 7.2%. Business travel to the region grew strongly as visitor numbers rose 37.8% to a record 542,000 and business nights were up 53.1% to 1.6m. This increase was driven by interstate business visitors and may be related to preparations for the Gold Coast 2018 Commonwealth Games, as well as travel during the games in April and other events in the region. Holiday visitation increased by 5.2% to 2.0m, while VFR travel decreased by 3.5% to 1.1m. The overall average length of stay in the region increased slightly, by 0.1 nights to 3.9 nights. Strong commercial accommodation performance may have helped the Gold Coast reach record levels of expenditure, with demand outstripping supply and average daily rates up 7.1% in the year ending December 2018 (Source: STR Global).

Tropical North Queensland (TNQ)

TNQ welcomed a record 2.1m domestic overnight visitors in the year ending December 2018, representing growth of 13.5%. These visitors spent a record \$2.4bn in the region (up 17.0%). Average length of stay increased by 0.1 nights to 5.1 nights and spend per night increased by 1.1% to \$226 per night. VFR (up 21.0% to a record 493,000) and business (up 18.4% to 426,000) grew particularly strongly while holiday visitation grew 11.0% to 1.1m. The TNQ result for 2018 was largely driven by strong first half performance with second half holiday performance appearing softer than 2017. This is reflected in commercial accommodation revenue, where year on year declines in revenue were seen from September 2018. This is despite Average Daily Rates (ADR) for commercial accommodation growing by 2.7% in the year ending December 2018 (Source: STR Global).

Sunshine Coast

Domestic overnight expenditure in the Sunshine Coast region grew by 16.6% to a record \$2.4bn in the year ending December 2018. Overall visitor numbers grew by 8.6% year on year to a record 3.7m. Business travel growth was the most notable, increasing by 31.1% to a record 325,000 visitors, while the region saw 8.2% growth in holiday travel, welcoming over 2.0m holiday visitors for the first time. VFR travel also saw growth (up 8.3%) to a record 1.3m. Growth was driven by intrastate visitation which was up 10.8% to a record 2.8m, while the interstate market grew by 2.2% to 859,000. As well as the increase in visitation, overnight expenditure was boosted by a 11.2% increase in spend per night to \$185 per night. Increased accommodation rates in the region may have contributed to the increased spend per night. Average daily rate (ADR) for commercial accommodation was up by 3.6% in the year ending December 2018 (Source: STR Global).

Whitsundays

The Whitsundays region was the most impacted when Tropical Cyclone Debbie hit in late March 2017. Almost two years after the event, we see that visitation has surpassed levels seen prior to the Cyclone and reached record levels, and expenditure continues to grow strongly.

Over the three years ending December 2018, domestic overnight visitation grew 11.8% on average to a record 651,000 visitors, while expenditure in the region grew 15.2% to \$745.1m. While average length of stay increased slightly, up 2.3% on average over the three years ending December 2018, expenditure per night was steady at \$249 (down 0.7%). Holiday visitation grew 10.8% on average to 404,000 over the three-year period. Intrastate visitation grew by 16.7% on average over the three years to 398,000, while interstate visitation increased by 4.9% on average over the same period.



Intrastate visitation

	Visitors	Annual change
Total intrastate	17,005,000	12.1%
Brisbane	4,595,000	13.9%
Gold Coast	1,776,000	1.1%
Sunshine Coast	2,825,000	10.8%
SQC	1,850,000	18.4%
SGBR	1,905,000	16.4%
Townsville	1,097,000	28.4%
TNQ	1,335,000	12.1%

	Visitors	3-yr trend
Fraser Coast	619,000	11.4%
Mackay	921,000	10.5%
Outback	670,000	1.9%
Whitsundays	398,000	16.7%

Interstate visitation

	Visitors	Annual change
Total interstate	7,081,000	7.2%
Brisbane	2,922,000	0.3%
Gold Coast	2,018,000	13.2%
Sunshine Coast	859,000	2.2%
SQC	356,000	-9.7%
SGBR	271,000	-2.6%
Townsville	281,000	27.6%
TNQ	730,000	16.2%

	Visitors	3-yr trend
Fraser Coast	152,000	3.6%
Mackay	125,000	3.2%
Outback	214,000	7.5%
Whitsundays	252,000	4.9%

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Domestic visitors by region

	Visitors	Annual change	Holiday visitors	Annual change
Total Queensland	24,086,000	10.6%	9,426,000	9.8%
Brisbane	7,517,000	8.2%	2,164,000	10.8%
Gold Coast	3,795,000	7.2%	2,048,000	5.2%
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TNQ ⁹	2,065,000	13.5%	1,058,000	11.0%

	Visitors	3-yr trend ¹⁰	Holiday visitors	3-yr trend
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Mackay	1,046,000	9.5%	220,000	6.8%
Outback	884,000	3.1%	312,000	7.4%
Whitsundays	651,000	11.8%	404,000	10.8%

Expenditure in Queensland regions

	Expenditure	Annual change	Share	Spend per visitor
Total Queensland	\$18,263.5m	15.6%	100%	\$758
Brisbane	\$4,629.7m	8.5%	25.3%	\$616
Gold Coast	\$3,517.7m	19.7%	19.3%	\$927
Sunshine Coast	\$2,385.2m	16.6%	13.1%	\$648
SQC	\$795.8m	17.6%	4.4%	\$361
SGBR	\$1,182.1m	19.1%	6.5%	\$543
Townsville	\$892.6m	15.2%	4.9%	\$648
TNQ	\$2,382.4m	17.0%	13.0%	\$1,154

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$444.2m	18.9%	2.4%	\$576
Mackay	\$540.2m	20.6%	3.0%	\$517
Outback	\$623.0m	6.7%	3.4%	\$705
Whitsundays	\$745.1m	15.2%	4.1%	\$1,145

Fraser Coast

The Fraser Coast region welcomed a record 772,000 domestic overnight visitors in the year ending December 2018. Over the three years ending December 2018, visitation grew 9.5% on average with expenditure growing 18.9% on average to a record \$444.2m. Overnight visitor expenditure was boosted by spend per night increasing by 5.7% on average (three-year trend) to \$142 per night. The holiday market was the primary driver of growth, up by 10.9% on average over the three year period to a record 413,000 in the year ending December 2018. The VFR market grew by 6.2% on average over the three years to 254,000. Intrastate visitors accounted for 80% of trips to the region and grew by 11.4% on average while the interstate market grew by 3.6%.

Townsville

Domestic overnight visitation to the Townsville region grew strongly in the year ending December 2018. Visitation grew 28.3% to a record 1.4m, expenditure grew 15.2% to \$892.6m and nights grew 33.3% to a record 4.8m. VFR trips recorded the strongest growth, up 51.9% to a record 412,000. Holiday and business visitation also grew strongly, by 32.5% and by 13.1% respectively. The intrastate market accounts for 80% of domestic visitors to the region and grew 28.4% to a record 1.1m visitors. The interstate market also reached record levels, growing 27.6% to 281,000 visitors.

Southern Queensland Country (SQC)

The SQC region welcomed a record 2.2m domestic overnight visitors in the year ending December 2018, up 12.7% year on year. These visitors spent a record \$795.8m in the region (up 17.6%). VFR and business travel both reached record levels, with VFR up 20.2% to 899,000 and business up 16.0% to 539,000. On the other hand holiday visitation was down 4.9% to 586,000. The decline in holiday travel was driven by the interstate market (down 27.1%), while intrastate holiday trips grew 2.6%. Overall, the intrastate market grew 18.4% to a record 1.8m, while the interstate market declined 9.7%. Along with increased visitation, visitor expenditure was boosted by a 10.4% increase in visitor spend per night in the region, to \$135 per night.

Southern Great Barrier Reef (SGBR)

The SGBR region continued to see record levels of visitation, welcoming 2.2m visitors, up by 13.6% in the year ending December 2018. These visitors spent \$1.2bn in the region, up 19.1% year on year. The biggest source of growth was the business market, which grew by 51.3% to a record 719,000 visitors. Holiday travel also grew, up 14.4% to 755,000 visitors, while VFR travel declined by 8.1% to 534,000 visitors. Alongside increased visitation, the increase in expenditure reflects an increase in average length of stay, up by 0.3 nights to 3.8 nights, with total nights up 22.8% to 8.3 million.

Mackay

In the three years ending December 2018, domestic visitation to Mackay increased 9.5% on average to a record 1.0 million visitors. Over the same period overnight visitor expenditure grew by 20.6% on average to reach a record \$540.2m. Visitors increased their length of stay by 4.0% on average over the three years to 4.0 nights and spend per night increased by 4.9% on average to \$131 per night, aiding the strong growth in total expenditure. Business travel grew 14.1% on average to a record 565,000, with business travellers accounting for more than half (54%) of domestic visitors to the region. Meanwhile, holiday and VFR visitation grew 6.8% and 6.4% on average respectively. Visitation growth in the three years ending December 2018 was driven by the intrastate market, up by 10.5% on average to a record 921,000; while the interstate market grew by 3.2% on average to 125,000.

Outback

Domestic overnight visitor expenditure grew by 6.7% on average over the three years ending December 2018 to \$623.0m. Underlying this was 3.1% average growth in visitation to 884,000 and 9.1% average growth in the average length of stay to 5.5 nights, resulting in overall nights growth of 12.2%. Business visitation to the region grew 8.2% on average to 400,000 and holiday visitation to the region grew 7.4% on average over the three years ending December 2018 to 312,000. These holiday visitors spent 1.7m nights in the region (up 11.6% on average). VFR visitation decreased 10.0% on average over the three years to 141,000. Visitation growth predominantly came from the interstate market, with visitation increasing by 7.5% on average over the three years to 214,000. Intrastate travel grew by 1.9% on average over the three years to 670,000.

Intrastate visitation

	Visitors	Annual change
Total intrastate	17,005,000	12.1%
Brisbane	4,595,000	13.9%
Gold Coast	1,776,000	1.1%
Sunshine Coast	2,825,000	10.8%
SQC	1,850,000	18.4%
SGBR	1,905,000	16.4%
Townsville	1,097,000	28.4%
TNQ	1,335,000	12.1%

	Visitors	3-yr trend
Fraser Coast	619,000	11.4%
Mackay	921,000	10.5%
Outback	670,000	1.9%
Whitsundays	398,000	16.7%

Interstate visitation

	Visitors	Annual change
Total interstate	7,081,000	7.2%
Brisbane	2,922,000	0.3%
Gold Coast	2,018,000	13.2%
Sunshine Coast	859,000	2.2%
SQC	356,000	-9.7%
SGBR	271,000	-2.6%
Townsville	281,000	27.6%
TNQ	730,000	16.2%

	Visitors	3-yr trend
Fraser Coast	152,000	3.6%
Mackay	125,000	3.2%
Outback	214,000	7.5%
Whitsundays	252,000	4.9%

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State expenditure comparison

	Expenditure	Annual change	Share of expenditure	Spend per visitor
Total Australia	\$72,705.5m	12.7%	100%	\$689
Queensland	\$18,263.5m	15.6%	25.1%	\$758
New South Wales	\$21,095.1m	13.1%	29.0%	\$610
Victoria	\$14,906.4m	9.2%	20.5%	\$580
Other States	\$15,768.7m	11.6%	21.7%	\$719

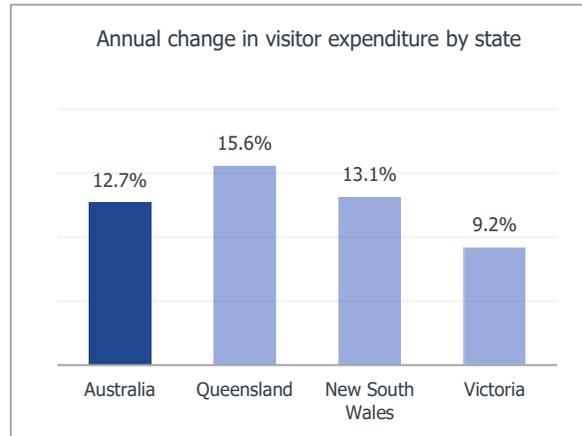
State visitation comparison

	Visitors	Annual Change	Avg stay	Annual # change
Total Australia	105,600,000	8.6%	3.6	0.0
Queensland	24,086,000	10.6%	3.9	0.0
New South Wales	34,554,000	9.4%	3.1	-0.1
Victoria	25,687,000	5.0%	2.9	0.0
Other States	24,577,000	8.7%	4.1	-0.1

Total holiday	42,364,000	7.6%	3.8	-0.1
Queensland	9,426,000	9.8%	4.4	-0.2
New South Wales	13,648,000	9.0%	3.4	-0.1
Victoria	10,987,000	3.3%	3.0	-0.1
Other States	9,753,000	8.2%	4.1	-0.3

Total VFR	35,507,000	8.2%	3.2	-0.1
Queensland	7,932,000	8.6%	3.4	0.0
New South Wales	12,001,000	8.1%	3.0	-0.1
Victoria	8,869,000	6.4%	2.8	-0.1
Other States	7,273,000	9.2%	3.6	0.0

Total business	23,865,000	13.8%	3.4	0.2
Queensland	5,587,000	15.0%	3.7	0.4
New South Wales	7,451,000	17.4%	2.6	0.1
Victoria	4,964,000	13.0%	2.5	0.3
Other States	6,441,000	10.5%	4.3	0.0



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.

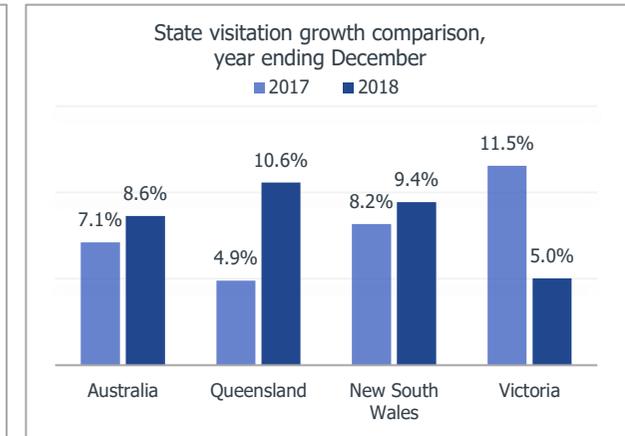
For this publication, data has been adjusted to conform to Tourism and Events Queensland's (TEQ) tourism region definitions.

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 as it better reflects the Australian resident population and phone ownership.

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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