International Tourism Snapshot

Year ending June 2024

International visitors to Australia

	Visitors	Change vs 2019	Avg stay[2]	Change vs 2019
Total Australia[3]	**7,353,000**	**-15.6%**	**37.8**	**6.3**
NZ	1,235,000	-4.9%	11.5	1.6
Asia[4]	3,447,000	-21.1%	45.6	8.5
North America[5]	825,000	-12.7%	19.4	0.5
Europe[6]	753,000	-14.9%	50.5	8.1
UK	581,000	-13.5%	36.5	6.0
Total holiday	**3,513,000**	**-25.2%**	**20.7**	**2.8**
NZ	532,000	-0.3%	7.8	0.5
Asia	1,589,000	-34.0%	18.8	3.0
North America	471,000	-14.0%	13.1	-0.5
Europe	457,000	-23.8%	40.6	5.0
UK	303,000	-22.2%	28.5	6.1
Total VFR[7]	**3,142,000**	**-7.2%**	**26.8**	**3.9**
NZ	584,000	-1.1%	10.7	0.9
Asia	1,345,000	-8.5%	36.9	6.5
North America	317,000	-2.8%	18.2	2.2
Europe	301,000	-5.1%	22.8	3.1
UK	365,000	-14.6%	21.7	2.0
Total business	**791,000**	**-24.9%**	**11.4**	**1.7**
NZ	164,000	53.0%	6.4	-16.1
Asia	332,000	-21.3%	12.8	0.6
North America	115,000	-31.5%	10.0	0.6
Europe	82,000	-25.0%	13.8	2.7
UK	49,000	-24.7%	16.7	5.6
Total education	**493,000**	**-24.4%**	**135.6**	**18.0**
NZ	9,000	-40.4%	52.2	22.2
Asia	373,000	-24.7%	137.3	14.6
North America	21,000	-31.3%	69.7	0.2
Europe	33,00	-30.3%	118.8	21.9
UK	np	np	np	np

International visitors spend more than ever in Australia

Nationally, overnight visitor expenditure from international visitors reached a new record of $31.7 billion. This was in line (up 0.9 per cent) with the amount spent in 2019. The record expenditure occurred, while visitation was still recovering. Australia welcomed 7.4 million international visitors, a recovery of 84.4 per cent. At the national level aviation capacity (93 per cent of 2019 levels) has recovered faster than international visitation.

The recovery in international visitation to Australia started with the strong comeback of visiting friends and relatives (VFR) and employment. OVE generated from VFR ($5.2 billion, up 14.0 per cent compared to 2019) and employment ($2.5 billion, up 62.0 per cent compared to 2019) visitors reached record levels. Business OVE has also exceeded 2019 levels. Business visitors spent $2.1 billion, which is 1.0 per cent more than in 2019.

Holiday and education are the biggest sources of overnight visitor expenditure to Australia, and they are close to their 2019 levels. Holiday OVE is 97.6 per cent recovered at $10.4 billion and education OVE is 90.8 per cent recovered at $11.1 billion.

OVE in four of Australia's five largest source markets are now above 2019 levels. This includes the UK ($2.1 billion, up 18.7 per cent), New Zealand ($2.1 billion, up 27.2 per cent) the United States of America ($2.1 billion, up 6.4 per cent) and India (1.4 billion, up 12.4 per cent). Outside of the top four nations there were records from Indonesia, Taiwan, South Korea and France. Australia welcomed a record number of visitors from both India (395,000, up 4.8 per cent) and Korea (322,000, up 26.5 per cent).

China was the largest source market for Australia in the year ending June 2024 in OVE terms. China is one of the slowest source markets to return to 2019 levels. Chinese visitation is only 56.1 per cent recovered and OVE is 73.6 per cent recovered. The slow recovery of the China market is weighing on Australia and Oceania more broadly with the Oxford Economics noting that Chinese arrivals to Oceania have only recovered to 66 per cent of 2019 levels. According to Oxford Economics, International arrivals to Oceania will close to pre-pandemic levels in 2025. Outbound travel from China, our biggest source market, is forecast to be close to pre-pandemic levels in 2025 (98 per cent of 2019 levels) (Source: Oxford Economics 2024)

For the second time, Tourism Research Australia has reported on the Philippines and Vietnam as individual source markets outside of 'other Asia'. In the year ending June 2024, visitors from Vietnam spent $837.3 million and visitors from the Philippines spent $502.9 million in Australia, making them the 12th and 18th largest markets respectively.

International visitor expenditure in Australia

	Expenditure	Change vs 2019
Total Australia	**$31,713.3m**	**0.9%**
Holiday	$10,361.7m	-2.4%
VFR[7]	$5,199.4m	14.0%
Business	$2,063.8m	1.0%
Employment	$2,514.6m	62.0%
Education	$11,138.7m	-9.2%

LAWN HILL, TROPICAL NORTH QUEENSLAND

International Tourism Snapshot

Year ending June 2024

State expenditure comparison

	Expenditure	Change vs 2019	Share of expenditure	Spend per visitor
Total Australia	**$31,713.3m**	**0.9%**	**100.0%**	**$4,313**
Queensland	$6,156.5m	1.2%	19.4%	$2,898
New South Wales	$12,230.2m	7.5%	38.6%	$3,304
Victoria	$8,146.6m	-7.7%	25.7%	$3,273

State visitation comparison

	Visitors	Change vs 2019	Avg stay	Change vs 2019
Total Australia	**7,353,000**	**-15.6%**	**37.8**	**6.3**
Queensland	2,124,000	-23.7%	24.5	4.7
New South Wales	3,702,000	-15.6%	26.8	4.7
Victoria	2,489,000	-20.7%	26.8	3.5
Other States	1,729,000	-15.9%	34.6	10.6
Total holiday	**3,513,000**	**-25.2%**	**20.7**	**2.8**
Queensland	1,211,000	-35.3%	14.5	2.3
New South Wales	1,837,000	-24.9%	14.6	2.8
Victoria	1,215,000	-28.4%	12.7	2.3
Other States	833,000	-29.0%	15.7	3.0
Total VFR [7]	**3,142,000**	**-7.2%**	**26.8**	**3.9**
Queensland	718,000	-4.9%	20.2	2.2
New South Wales	1,209,000	-0.2%	23.7	3.0
Victoria	903,000	-13.7%	21.0	-1.3
Other States	683,000	-5.2%	32.5	10.6
Total business	**791,000**	**-24.9%**	**11.4**	**1.7**
Queensland	185,000	-10.5%	7.8	0.9
New South Wales	360,000	-21.9%	10.1	1.5
Victoria	235,000	-31.2%	8.4	0.0
Other States	163,000	-18.9%	12.1	2.0
Total education	**493,000**	**-24.4%**	**135.6**	**18.0**
Queensland	81,000	-31.5%	127.5	19.4
New South Wales	203,000	-17.8%	124.8	7.1
Victoria	148,000	-27.3%	140.2	24.8
Other States	70,000	-29.8%	148.2	34.7

Recovery continues in Queensland

International OVE in Queensland reached a record $6.2 billion in the year ending June 2024, 1.2 per cent above 2019 levels. Expenditure is recovering faster than visitation, which is 76.3 per cent recovered (2.1 million visitors). Visitors tended to stay longer and spend more than they did pre-COVID-19. The average length of stay (ALoS) was 4.7 nights higher than 2019 at 24.5 nights, and the average spend per night was $118, 6.9 per cent higher than 2019.

Queensland followed the national pattern of OVE recovery, being led by VFR (up 16.4 per cent compared with 2019 to $945.2 million). There was also record levels for business and employment OVE. Business OVE was up 38.3 per cent to $402.7 million and employment OVE was up 106.8 per cent to $482.4 million.

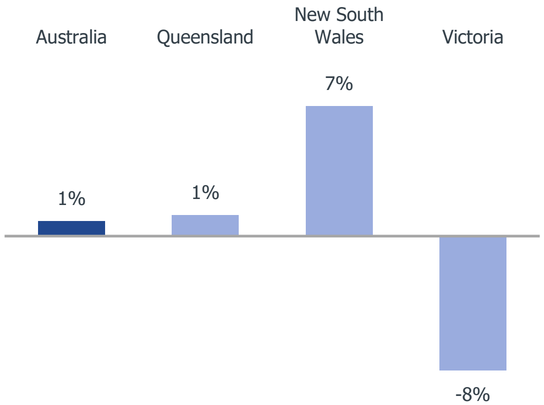
Holiday and education are further from recovering. Holiday OVE recovered to $2.6 billion or 89.3 per cent of 2019 levels and education OVE recovered to $1.6 billion or 90.8 per cent of 2019 levels.

Comparison to national performance

Queensland is slightly more advanced in its OVE recovery (101.2 per cent compared to 2019) than the national average (100.9 per cent recovered), but is behind the national average in recovering visitation numbers. Queensland's visitation is 76.3 per cent recovered compared to the national average of 84.4 per cent recovered.

Queensland outpaced the national recovery speed in OVE generated from VFR, business and employment. VFR OVE in Queensland was up 16.4 per cent compared to 2019 vs up 14.0 per cent national; business OVE in Queensland was up 38.3 per cent compared to 2019 vs being up 1.0 per cent nationally and employment OVE was up 106.8 per cent vs being up 62.0 per cent national. Education was 90.8 per cent recovered both in Queensland and for the national average. The recovery of OVE generated from holiday visitors to Queensland was behind the national average (89.3 per cent vs 97.6 per cent).

Change in Overnight Visitor Expenditure compared to 2019



ROMA, OUTBACK QUEENSLAND

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International Tourism Snapshot

TOURISM & EVENTS Queensland

Year ending June 2024

International visitors to Queensland

	Visitors	Change vs 2019	Avg stay	Change vs 2019
Total Queensland	**2,124,000**	**-23.7%**	**24.5**	**4.7**
NZ	466,000	-4.8%	10.5	0.7
Asia	717,000	-42.8%	33.9	11.3
North America	284,000	-6.2%	12.3	0.0
Europe	269,000	-18.7%	27.6	2.0
UK	209,000	-4.2%	23.0	4.0

Holiday	**1,211,000**	**-35.3%**	**14.5**	**2.3**
NZ	246,000	-1.4%	8.0	0.1
Asia	384,000	-57.7%	14.3	3.0
North America	183,000	-15.3%	8.4	0.4
Europe	208,000	-23.3%	22.2	1.5
UK	135,000	-7.0%	18.4	3.8

VFR[7]	**718,000**	**-4.9%**	**20.2**	**2.2**
NZ	212,000	-4.8%	10.5	1.3
Asia	219,000	-6.1%	32.8	5.3
North America	76,000	6.2%	14.2	0.9
Europe	56,000	-11.1%	16.3	2.0
UK	90,000	-5.3%	18.5	1.4

Business	**185,000**	**-10.5%**	**7.8**	**0.9**
NZ	38,000	-23.5%	5.5	1.4
Asia	65,000	-19.1%	8.4	0.3
North America	31,000	-1.8%	9.3	2.4
Europe	21,000	17.1%	10.8	3.6
UK	12,000	2.3%	6.9	0.1

Education	**81,000**	**-31.5%**	**127.5**	**19.4**
NZ	np	np	np	np
Asia	56,000	-29.4%	129.9	14.8
North America	np	np	np	np
Europe	np	np	np	np
UK	np	np	np	np

OVE has recovered past pre-COVID-19 levels from most of Queensland's individual source markets, though a few are still recovering. Queensland's largest source markets, New Zealand ($820.5 billion, up 35.5 per cent compared to 2019), and the United Kingdom ($499.1 million, up 45.8 per cent) are performing the strongest relative to the pre-COVID-19 period. OVE from both Japan ($511.1 million, up 11.2 per cent) and the United States of America ($460.2 million, up 9.8 per cent) has also recovered past pre-COVID-19 levels. On the other hand, Queensland's largest market by OVE, China, is still quite far from 2019 levels. With a total OVE of $832.7 million China has returned to being Queensland's largest market by OVE. However, Chinese OVE has only recovered to 51.6 per cent of what it was in 2019. The recovery from Chinese VFR and education visitation outpaced holiday recovery. Chinese holiday visitation (16.0 per cent of 2019) and OVE (17.6 per cent of 2019) is still only a small fraction of 2019 levels.

Outside of Queensland's top five markets, South Korea reached record levels of both OVE and visitation. Also, visitors from France spent a record amount in Queensland. There was also a record number of visitors from Indonesia.

South Koreans break records again.

Since borders have reopened South Korea has been a star performer for Queensland. Queensland has reached either a record number of visitors or expenditure in each of the three most recent year ended results. In the year-ending June 2024 Queensland has achieved a record for both. There were 102,000 (up 36.9 per cent compared to 2019) South Korean visitors to Queensland that spent $338.8 million (up 35.4 per cent). These record numbers have been seen across travel purposes i.e. holiday, VFR and education. South Korea has also given Queensland a record for holiday visitation (78,000, up 35.8 per cent), holiday OVE ($172.7 million, up 19.8 per cent), VFR visitation (16,000, up 49.4 per cent) and education OVE ($110.3 million up 65.8 per cent). Visitors from South Korea particularly love South-East Queensland, flocking to both Brisbane and the Gold Coast in record numbers and becoming a top five source market for both of these regions.

International expenditure in Queensland

	Expenditure	Change vs 2019
Total Queensland	**$6,156.5m**	**1.2%**
Holiday	$2,556.3m	-10.7%
VFR	$945.2m	16.4%
Business	$402.7m	38.3%
Employment	$482.4m	106.8%
Education	$1,645.4m	-9.2%

French visitors love Queensland

It might be a coincidence, but in the lead up to the Paris Olympics French visitors have spent a record amount in Queensland, a future Olympics host. French residents spent a record $111.7 million 29.5 per cent above 2019 levels. Most of the 37,000 French visitors to Queensland came to enjoy a holiday. These visitor numbers are still recovering and currently sit at 75.5 per cent of 2019 levels. However, French visitors are now enjoying Queensland for longer, increasing their ALoS by 13.7 nights to 39.4 nights. Almost half (49 per cent) of French holidaymakers are on a working holiday, which is up from a third (32 per cent) in 2019.

Records from Indonesia

While Bali is a popular destination for Australians, but visitation from Indonesia to Queensland is now breaking records. There was a record 31,000 visitors from Indonesia, which is up 5.4 per cent compared to 2019. While these visitors did not spend a record amount, the $96.2 million that they did spend was 57.5 per cent more than in 2019. Most of the growth in OVE has been due to visitors both staying for longer and spending more per night. Of the 31,000 visitors, more than half (17,000) are on holidays in Queensland.

International Tourism Snapshot

Year ending June 2024

International visitors by region

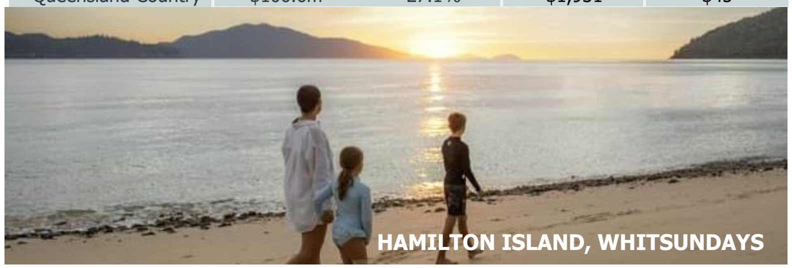
	Visitors	Change vs 2019	Avg stay [2]	Holiday visitors	Change vs 2019
Total Queensland	**2,124,000**	**-23.7%**	**24.5**	**1,211,000**	**-35.3%**
Brisbane	1,245,000	-15.7%	21.7	516,000	-33.2%
Gold Coast	647,000	-40.1%	12.5	459,000	-46.0%
TNQ	497,000	-38.5%	10.7	439,000	-41.2%
Sunshine Coast	302,000	-8.5%	14.3	215,000	-14.4%
Whitsundays	181,000	-17.7%	6.4	171,000	-18.3%
SGBR[9]	80,000	-40.3%	14.3	55,000	-48.5%
Fraser Coast	96,000	-26.9%	5.4	86,000	-26.2%
Townsville	105,000	-16.8%	11.2	81,000	-21.8%

	Visitors	Change vs 2019	Avg stay [2]	Holiday visitors	Change vs 2019
Mackay	30,000	-36.5%	18.5	20,000	-44.4%
Outback Queensland	19,000	-26.7%	23.3	11,000	-30.8%
Queensland Country	52,000	-31.8%	43.1	20,000	-40.1%

Expenditure in Queensland regions

	Expenditure	Change vs 2019	Spend per visitor	Spend per night
Total Queensland	**$6,156.5m**	**1.2%**	**$2,898**	**$118**
Brisbane	$3,174.6m	10.1%	$2,549	$117
Gold Coast	$1,158.5m	-13.6%	$1,790	$144
TNQ	$905.7m	-11.9%	$1,821	$170
Sunshine Coast	$370.7m	31.2%	$1,228	$86
Whitsundays	$184.1m	20.9%	$1,016	$158
SGBR[9]	$81.3m	5.2%	$1,013	$71
Fraser Coast	$61.0m	33.5%	$637	$117
Townsville	$85.9m	-10.2%	$817	$73

	Expenditure	Change vs 2019[1]	Spend per visitor	Spend per night
Mackay	n/p	n/p	n/p	n/p
Outback Queensland	$13.6m	-9.0%	$709	$30
Queensland Country	$100.6m	-27.1%	$1,931	$45



HAMILTON ISLAND, WHITSUNDAYS

Brisbane

OVE in Brisbane reached $3.2 billion which is up 10.1 per cent compared to 2019. Brisbane's OVE is exceeding 2019 levels because visitors are spending more per night. Visitors spent an average $117, which is 10.1 per cent more than in 2019. Brisbane welcomed 1.2 million international visitors, which is a recovery to 84.3 per cent of 2019 levels. Visitation for employment was already above 2019 levels (up 50.0 per cent vs 2019 at 33,000), whilst visiting friends and relatives (440,000, 96.9 per cent recovered) and business visitation (137,000 or 97.6 per cent recovered) were both close to reaching recovery. On the other hand, both holiday (516,000 or 66.8 per cent recovered) and education (56,000 or 70.6 per cent recovered) were still far from full recovery. Brisbane welcomed a record number of visitors from New Zealand (241,000, up 5.2 per cent), the USA (114,000, up 3.9 per cent), South Korea (62,000, up 44.0 per cent), Canada (48,000, up 25.0 per cent) and Indonesia (up 16.1 per cent to 19,000). However, Brisbane's largest source market before COVID-19, China, was still at 34.2 per cent of 2019 levels of visitation (95,000) - a common challenge across Australia. Despite this, China was still Brisbane's fourth largest market by visitation.

Gold Coast

OVE on the Gold Coast was slightly down on pre-COVID-19 levels ($1.2 billion or 86.4 per cent recovered). Visitation was further behind with 647,000 visitors, a recovery of 59.9 per cent. Travel for visiting friends and relatives was the closest to recovering (153,000, or 91.5 per cent of 2019 level). Holiday (459,000 visitors or 54.0 per cent recovered), education (15,000 or 63.2 per cent of 2019 levels), and business (24,000 or 65.9 per cent of 2019 levels) were all quite far from returning to 2019 numbers. The relatively slow recovery of visitation to the Gold Coast was driven by the reliance on Chinese visitation before COVID-19, which has been slow to return. In the year ending June 2024, there were 48,000 Chinese visitors or just 17.6 per cent of 2019 levels. Visitation from Japan has also been slow to recover (31,000 or 40.8 per cent of 2019). On the other hand, the Gold Coast welcomed a record number of visitors from both New Zealand (214,000, up 1.1 per cent compared to 2019) and South Korea (57,000, up 69.0 per cent), making them the two largest source markets.

Tropical North Queensland (TNQ)

OVE in Tropical North Queensland reached $905.7 million, a recovery of 88.1 per cent recovered to 2019 levels. The recovery in visitation has been slower with 497,000 visitors, which is 61.5 per cent of 2019 levels. Having said that, international visitors are now both staying longer and spending more per night than in 2019. The average length of stay was 10.7 nights, which is 2.3 nights more than in 2019 and the average spend per night was $170 which is 13.1 per cent more than in 2019. It is the holiday market which drives visitation to the region. There were 439,000 holiday visitors, which represents a 58.8 per cent recovery compared to 2019 levels. Part of the reason for the slow recovery in visitation to TNQ is the reliance on China. In 2019, around one in four visitors to the region were Chinese. In the year ending June 2024, TNQ welcomed 20,000 Chinese visitors which is around a tenth (10.5 per cent) of visitation in 2019. Conversely, visitation from the UK is close to achieving a full recovery (71,000 visitors or 98.6 per cent of 2019). TNQ's other major markets are around 80 per cent recovered, including Japan (90,000 visitors or 80.8 per cent of 2019), USA (83,000 visitors or 78.7 per cent), Germany (39,000 or 86.5 per cent) and New Zealand (29,000 or 77.6 per cent).

International Tourism Snapshot

Year ending June 2024

International visitors by region

	Visitors	Change vs 2019	Avg stay [2]	Holiday visitors	Change vs 2019
Total Queensland	**2,124,000**	**-23.7%**	**24.5**	**1,211,000**	**-35.3%**
Brisbane	1,245,000	-15.7%	21.7	516,000	-33.2%
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Whitsundays	181,000	-17.7%	6.4	171,000	-18.3%
SGBR[9]	80,000	-40.3%	14.3	55,000	-48.5%
Fraser Coast	96,000	-26.9%	5.4	86,000	-26.2%
Townsville	105,000	-16.8%	11.2	81,000	-21.8%

	Visitors	Change vs 2019	Avg stay [2]	Holiday visitors	Change vs 2019
Mackay	30,000	-36.5%	18.5	20,000	-44.4%
Outback Queensland	19,000	-26.7%	23.3	11,000	-30.8%
Queensland Country	52,000	-31.8%	43.1	20,000	-40.1%

Expenditure in Queensland regions

	Expenditure	Change vs 2019	Spend per visitor	Spend per night
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Sunshine Coast	$370.7m	31.2%	$1,228	$86
Whitsundays	$184.1m	20.9%	$1,016	$158
SGBR [9]	$81.3m	5.2%	$1,013	$71
Fraser Coast	$61.0m	33.5%	$637	$117
Townsville	$85.9m	-10.2%	$817	$73

	Expenditure	Change vs 2019	Spend per visitor	Spend per night
Mackay	n/p	n/p	n/p	n/p
Outback Queensland	$13.6m	-9.0%	$709	$30
Queensland Country	$100.6m	-27.1%	$1,931	$45


NORTH STRADBROKE ISLAND (MINJERRIBAH), BRISBANE

Fraser Coast

In the Fraser Coast region international visitor expenditure reached $61.0 million, exceeding 2019 levels by 33.5 per cent. Visitor expenditure has grown because of a substantial increase in both the average length of stay (ALoS) and average spend per night. The ALoS of visitors to the Fraser Coast was 0.6 nights more than in 2019 at 5.4 nights and the average spend per night was 61.2 per cent higher at $117. Visitation on the other hand is yet to recover (73.1 per cent recovered compared to 2019, at 96,000). Most of these visitors were on holidays. Holiday visitation recovered to 86,000 or 73.8 per cent of 2019 levels. Visitation from both the UK (24,000 visitors or 75.1 per cent recovered) and continental Europe (49,000 or 74.4 per cent recovered) is around three quarters of what it was in 2019.

Whitsundays

Total international OVE exceeded 2019 levels, reaching $184.1 million, up 20.9 per cent vs 2019. The recovery has largely been driven by growth in average spend per night. Visitors spent $158 per night on average which is 41.9 per cent more than in 2019. On the other hand there were 181,000 visitors, a recovery of 82.3 per cent. The holiday market drove results in the Whitsundays. There were 171,000 holiday visitors, which is an 81.7 per cent recovery compared to 2019. Visitation from the UK (50,000, up 16.6 per cent vs 2019), the USA (23,000, up 9.2 per cent) and Canada (11,000, up 16.9 per cent) were all above 2019 levels. Among the Whitsundays other largest markets, visitation from Germany (22,000, 74.5 per cent recovered) and France (10,000, 86.7 per cent recovered) were still recovering.

Townsville

Total international OVE reached $85.9 million, which is a recovery of 89.8 per cent compared to 2019. This OVE was on the back of 105,000 visitors (83.2 per cent recovered). There were 81,000 holiday visitors, which is a recovery of 78.2 per cent. On the other hand, the number of VFR visitors is 1.7 per cent above 2019 levels at 16,000 visitors. Visitation from the UK (22,000, up 1.2 per cent) and Asia (15,000, up 45.4 per cent) have recovered past 2019 levels. Visitation from continental Europe (47,000, 76.0 per cent recovered) and North America (10,000, 73.3 per cent recovered) is still recovering.

Southern Great Barrier Reef (SGBR)

Total international OVE reached $81.3 million in the Southern Great Barrier Reef region, which exceeded 2019 levels by 5.2 per cent. This reflects the fact that international visitors average spend was $71 which is 54.4 per cent higher than 2019. On the other hand, visitation is still recovering. The region welcomed 80,000 visitors which was a recovery of 59.7 per cent. Holiday visitation was particularly slow to recover. There were 55,000 holiday visitors a recovery of 51.5 per cent. There were 16,000 visiting friends and relatives visitors which is a recovery of 88.0 per cent. There were 11,000 visitors from the USA which is above pre-COVID-19 levels (up 11.5 per cent). Visitation from SGBR's other three largest source markets were all still recovering. These were: the United Kingdom (13,000, 55.8 per cent recovered), New Zealand (12,000, 77.2 per cent recovered) and Germany (10,000 or 51.2 per cent recovered).

International Tourism Snapshot

Year ending June 2024

Sunshine Coast

International visitors spent $370.7 million on the Sunshine Coast which is up 31.2 per cent compared to 2019. This growth reflects that the average length of stay has increased 5.7 nights to 14.3 nights compared to 2019. The Sunshine Coast was also the closest Queensland region to reaching its pre-COVID-19 international visitation levels. Visitation recovered to 302,000 visitors or 91.5 per cent compared to 2019. This was driven by the 75,000 VFR visitors, which is up 11.2 per cent compared to 2019. Holiday visitation has had a slower recovery, there were 215,000 holiday visitors which is the equivalent of 85.6 per cent compared with 2019. New Zealand was the region's largest international market, and is close to recovery (78,000, 91.2 per cent recovered vs 2019). Visitation from the second largest market, the United Kingdom, was already above pre-COVID-19 levels (62,000 visitors, up 12.0 per cent vs 2019).

Outback Queensland

Total overnight visitor expenditure reached $13.6 million which was 91.0 per cent of 2019 levels. The recovery in visitation was slower than the recovery in OVE, but visitors are staying longer. There were 19,000 international visitors, which is a recovery of 73.3 per cent. The average length of stay was 23.3 nights which is 9.2 nights more than in 2019. There were 11,000 holiday visitors, which is a recovery of 69.2 per cent.

Mackay

Annual international visitation to Mackay has recovered 63.5 per cent compared to 2019, with a total of 31,000 visitors. Spend data is not reportable due to a small sample size. There were 20,000 holiday visitors which was the equivalent to a 55.6 per cent recovery compared to 2019. The region's largest source market is continental Europe with 12,000 visitors, a recovery of 55.5 per cent.

Queensland Country

Queensland Country's international overnight visitor expenditure recovered to $100.6 million or 72.9 per cent of what it was in 2019. The OVE recovery was broadly in line with the recovery in visitation. There were 52,000 international visitors, a recovery of 68.2 per cent. Visiting friends and relatives was the most common reason to visit the region with 23,000 visitors, which is a recovery of 86.8 per cent. The recovery in VFR visitation has been quicker than the recovery of holiday visitation. There were 20,000 holiday visitors which is 59.9 per cent of 2019 levels. There were 11,000 visitors from New Zealand (65.7 per cent of 2019 levels), 11,000 visitors from Asia (52.4 per cent of 2019 levels and 15,000 visitors from Europe (including the UK) which is the equivalent of 59.8 per cent of 2019 levels.

Note: The Central Highlands local government area has been amalgamated into the Southern Queensland Country tourism region to better align with the tourism experiences of the region, forming Queensland Country. Previously Central Highlands had been in the Southern Great Barrier Reef region. All past data has been revised to reflect this change.

Outback, Queensland Country and Mackay growth is usually reported on a three-year trend basis given the large, expected variability in the annual growth due to smaller sample sizes. Given no data was available for 2020-2022, we are comparing directly to 2019 and caution should be taken in interpreting figures.

International visitors by region and source market

	China		Europe (excl UK)		Japan		New Zealand		North America		United Kingdom	
	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019
Total Queensland	**143,000**	**-71.3%**	**269,000**	**-18.7%**	**158,000**	**-27.7%**	**466,000**	**-4.8%**	**284,000**	**-6.2%**	**209,000**	**-4.2%**
Brisbane	95,000	-65.8%	173,000	-16.4%	46,000	-1.2%	241,000	5.2%	162,000	9.4%	136,000	5.9%
Gold Coast	48,000	-82.4%	73,000	-25.3%	31,000	-59.2%	214,000	1.1%	55,000	-15.1%	52,000	-16.9%
Sunshine Coast	n/p	n/p	79,000	-18.3%	n/p	n/p	78,000	-8.8%	34,000	-5.9%	62,000	12.0%
Fraser Coast	n/p	n/p	49,000	-25.6%	n/p	n/p	9,000	n/p	n/p	n/p	24,000	-24.9%
SGBR [9]	n/p	n/p	29,000	-48.2%	n/p	n/p	12,000	-22.8%	14,000	-3.6%	13,000	-44.2%
Whitsundays	n/p	n/p	72,000	-21.2%	n/p	n/p	9,000	n/p	34,000	-4.2%	50,000	16.6%
TNQ	20,000	-89.5%	119,000	-25.1%	90,000	-19.2%	29,000	-22.4%	101,000	-22.8%	71,000	-1.4%
Townsville	n/p	n/p	47,000	-24.0%	n/p	n/p	n/p	n/p	10,000	-26.7%	22,000	n/p

	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019
Mackay [10]	n/p	n/p	12,000	-44.5%	n/p	np	n/p	n/p	n/p	n/p	n/p	n/p
Outback Queensland [10]	n/p	n/p	n/p	np	n/p	np	n/p	n/p	n/p	n/p	n/p	n/p
Queensland Country [10]	n/p	n/p	10,000	-40.9%	n/p	np	11,000	-34.3%	n/p	n/p	n/p	n/p

International Tourism Snapshot

Year ending June 2024

	Queensland						Australia				
	Visitors	Change Vs 2019	Annual change	Expenditure	Change Vs 2019	Annual change	Visitors	Change Vs 2019	Annual change	Expenditure	Change Vs 2019
New Zealand	466,000	-4.8%	25.2%	$820.5m	35.5%	28.9%	1,235,000	-4.9%	26.4%	$2,072.9m	27.2%
Total Asia[4]	**717,000**	**-42.8%**	**65.9%**	**$2,697.4m**	**-20.4%**	**66.9%**	**3,447,000**	**-21.1%**	**57.7%**	**$19,007.3m**	**-6.7%**
China	143,000	-71.3%	272.3%	$832.7m	-48.4%	254.4%	746,000	-43.9%	216.8%	$7,612.7m	-26.4%
Japan	158,000	-27.7%	138.3%	$511.1m	11.2%	79.1%	329,000	-28.2%	102.5%	$1,338.4m	8.0%
Singapore	39,000	-44.3%	-7.0%	$133.8m	-11.7%	29.0%	340,000	-18.4%	10.1%	$1,124.8m	2.3%
Malaysia	25,000	-46.5%	6.0%	$83.8m	0.3%	11.5%	177,000	-48.5%	32.4%	$696.5m	-27.8%
Korea	102,000	36.9%	237.6%	$338.8m	35.4%	155.9%	322,000	26.5%	105.7%	$1,390.7m	30.1%
India	74,000	-10.5%	16.0%	$181.8m	21.1%	-2.8%	395,000	4.8%	8.8%	$1,419.9m	12.4%
Hong Kong	21,000	-67.7%	22.7%	$111.5m	-46.0%	49.0%	194,000	-32.1%	77.4%	$920.8m	-10.0%
Indonesia	31,000	5.4%	29.5%	$96.2m	57.5%	-4.1%	194,000	-1.8%	30.2%	$854.8m	25.2%
Taiwan	29,000	-64.4%	36.2%	$137.3m	-33.7%	95.3%	139,000	-21.9%	105.3%	$782.2m	10.7%
Thailand	18,000	-7.0%	-33.5%	$80.7m	41.6%	-35.5%	89,000	-5.7%	9.8%	$441.7m	9.7%
Philippines[11]	29,000	n/p	n/p	$61.6m	n/p	n/p	159,000	n/p	n/p	$502.9m	n/p
Viet Nam[11]	18,000	n/p	n/p	$27.0m	n/p	n/p	165,000	n/p	n/p	$837.3m	n/p
Other Asia[11]	31,000	n/p	n/p	$101.0m	n/p	n/p	200,000	n/p	n/p	$1,084.5m	n/p
North America[5]	**284,000**	**-6.2%**	**47.9%**	**$691.9m**	**22.6%**	**39.9%**	**825,000**	**-12.7%**	**26.3%**	**$2,622.2m**	**6.8%**
USA	215,000	-8.8%	53.6%	$460.2m	9.8%	39.9%	670,000	-12.6%	28.4%	$2,054.4m	6.4%
Canada	69,000	3.3%	32.8%	$231.7m	59.8%	39.9%	155,000	-13.2%	17.9%	$567.8m	8.4%
Total Europe[6]	**478,000**	**-13.0%**	**18.6%**	**$1,257.7m**	**19.3%**	**28.8%**	**1,333,000**	**-14.3%**	**15.6%**	**$5,487.2m**	**7.8%**
United Kingdom	209,000	-4.2%	14.7%	$499.1m	45.8%	18.7%	581,000	-13.5%	8.2%	$2,114.7m	18.7%
Germany	68,000	-15.1%	37.4%	$183.0m	13.3%	52.2%	152,000	-22.9%	19.8%	$656.6m	-5.2%
France	37,000	-24.5%	15.8%	$111.7m	29.5%	31.4%	118,000	-13.1%	31.9%	$629.2m	**28.3%**
Scandinavia	26,000	-35.4%	-8.7%	$109.6m	-2.9%	46.9%	79,000	-23.2%	13.5%	$326.8m	-12.9%
Italy	19,000	-25.3%	24.8%	$51.3m	-10.8%	35.1%	62,000	-14.5%	20.2%	$254.6m	-17.3%
Switzerland	15,000	-2.4%	6.5%	$58.2m	101.2%	67.5%	41,000	-19.0%	27.7%	$230.3m	**5.7%**
Netherlands	21,000	-16.6%	16.3%	$56.2m	5.2%	10.9%	49,000	-19.9%	14.3%	$247.2m	12.6%
Other Europe	82,000	-13.2%	31.2%	$188.5m	-10.7%	23.4%	251,000	-4.7%	23.1%	$1,027.8m	2.5%
Other markets	**179,000**	**-4.8%**	**9.4%**	**$689.1m**	**46.0%**	**7.5%**	**513,000**	**-5.5%**	**12.2%**	**$2,523.7m**	**32.7%**
All markets	**2,124,000**	**-23.7%**	**35.9%**	**$6,156.5m**	**1.2%**	**41.1%**	**7,353,000**	**-15.6%**	**35.5%**	**$31,713.3m**	**0.9%**

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 expressed in nights
3. Total includes those visitors classified as 'Other'. Therefore, the sum of Holiday, VFR, Business and Education visitors may not equal to 'Total'
4. Asia includes Japan, China, Korea, Singapore, Malaysia, Hong Kong, India, Indonesia, Taiwan, Thailand, Philippines, Viet Nam and Other Asia
5. North America includes United States of America and Canada
6. Europe includes Germany, France, Scandinavia, Netherlands, Italy, Switzerland and Other Europe
7. Visiting friends or relatives (VFR)
8. All expenditure figures include package expenditure
9. Southern Great Barrier Reef region is comprised of the Capricorn, Bundaberg and Gladstone regions
10. To stabilise some results, trend is used to average data over three years. Trend change is the average change over three years rather than a year on year comparison
11. Until year ending December 2023 Philippines and Viet Nam were included in Other Asia. As a result comparisons to previous peiods for Other Asia, Philippines and Viet Nam are not publishable.

Other notes:
- Expenditure estimates should be used with caution
- "n/p" = not published for technical reasons
- For this publication data has been adjusted to conform to Tourism and Events Queensland's regional definitions, which may differ slightly from ABS Tourism Regions

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Data Source:
International Visitor Survey (IVS), Tourism Research Australia. The information included in this report was extracted from the IVS conducted Tourism Research Australia (TRA). IVS information is collected by personal interviews with short-term international visitors to Australia in the departure lounges at eight Australian airports prior to departure. The IVS is weighted to total figures supplied by the Australian Bureau of Statistics' Overseas Arrivals and Departures and does not include persons aged under 15 years.