

Domestic Tourism Snapshot

Year ending September 2022



Domestic overnight visitors within Australia

	Visitors	Annual ¹ Change vs YE	Avg ² Annual #
		change Dec 2019	stay change
Total Australia³	101,618,000	22.9%	-13.5%
Holiday	45,289,000	20.9%	-2.0%
VFR ⁴	33,515,000	23.6%	-16.1%
Business	19,111,000	31.3%	-29.3%

	Visitors	Annual ¹ Change vs YE	Avg ² Annual #
		change Dec 2019	stay change
Intrastate³	75,872,000	13.4%	-6.8%
Holiday	35,430,000	12.8%	4.2%
VFR ⁴	24,531,000	16.9%	-13.6%
Business	12,354,000	12.0%	-16.2%

	Visitors	Annual ¹ Change vs YE	Avg ² Annual #
		change Dec 2019	stay change
Interstate³	27,512,000	59.5%	-28.3%
Holiday	10,715,000	61.4%	-18.9%
VFR ⁴	9,308,000	45.8%	-22.0%
Business	6,966,000	85.0%	-44.6%

Domestic overnight visitor expenditure within Australia

	Expenditure	Annual ¹ Change vs YE
		change Dec 2019
Total Australia⁵	\$87,531.7m	43.6%
Holiday ⁶	\$45,062.4m	38.8%
VFR ⁶	\$13,679.5m	45.1%
Business ⁶	\$11,595.8m	42.4%

Highest-ever domestic spend in Australia

Domestic visitors in Australia spent a record \$87.5 billion, which is 8.5 per cent higher than the pre-COVID-19 benchmark year ending December 2019. This was on the back of 101.6 million domestic visitors travelling within Australia. Visitation is recovering strongly from 2021 (up 22.9 per cent) when COVID-19 was still causing lockdowns and border closures in various states, but despite the growth from 2021, visitation has not returned to the pre-COVID-19 levels and was still down 13.5 per cent compared to 2019. The increase in expenditure to record levels is due to spend per visitor being 25.4 per cent higher than before COVID-19 at \$861.

Nationally the increase in spend has been led by holiday travellers. Holiday visitor spend reached a record \$45.1 billion, which is 34.4 per cent higher than before COVID-19. Holiday visitation is also coming close to reaching its pre-COVID-19 levels, only being down 2.0 per cent compared to 2019. Australians are comfortable with travelling generally and particularly travelling interstate has increased throughout the year. Intrastate holiday visitation (up 4.2 per cent) was above pre-COVID-19 levels at an all-time record of 35.4 million. Visiting Friends and Relatives (VFR) overnight visitor expenditure (OVE) also reached a record \$13.7 billion (up 8.7 per cent) from 33.5 million visitors (down 16.1 per cent). However, business travel still trails behind other travel purposes and business OVE is down 24.1 per cent compared to pre-COVID-19 levels at \$11.6 billion. Nationally Tourism Research Australia's (TRA) forecasts do not predict VFR and business visitor nights to reach pre-COVID-19 levels until 2024 and 2025 respectively.

Intrastate travel led to the record levels of OVE. Intrastate OVE reached a record \$51.8 billion, which is up 19.8 per cent compared to 2019. Intrastate visitation is beginning to approach 2019 levels, but was still down 6.8 per cent at 75.9 million. Intrastate average spend per visitor was 28.5 per cent higher than the pre-COVID-19 period at \$683. While intrastate spend was above pre-COVID-19 levels, interstate OVE was still a little below. Interstate OVE was \$35.7 billion, down 4.6 per cent compared to 2019 and interstate visitation was down 28.3 per cent compared to 2019. However, interstate travel is recovering strongly compared to the previous year which was still affected by lockdowns and border closures. Interstate OVE is up by 82.6 per cent and interstate visitation is up by 59.5 per cent compared with 2021.

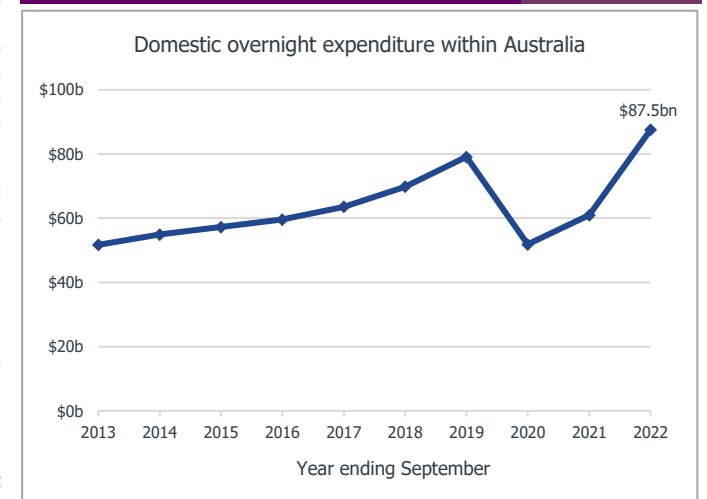
Holiday visitation up in the quarter

The September quarter 2022 is the third quarter since March 2020 without any lockdowns. Total domestic OVE in Australia was significantly higher (up 33.5 per cent) compared to September quarter 2019. This was on the back of spend per visit increasing 36.6 per cent to \$1,006. Total visitation was down 2.3 per cent. The growth in OVE came from both intrastate (up 35.5 per cent) and interstate (up 31.4 per cent). OVE grew across purposes led by holiday (up 58.3 per cent), followed by VFR (up 22.0 per cent) and even business OVE grew (up 5.3 per cent). Holiday visitation was also higher than before COVID-19, up 12.2 per cent.

NOTE: For three quarters of the year ending September 2022 (i.e. 1 October 2021 – 30 September 2022) Queensland's borders were open to all interstate travellers after borders were reopened to Victoria and New South Wales on 13 December 2021. For most of the December quarter 2021, border were closed to Queensland's largest market (Victoria and New South Wales).

September quarter 2022 overnight visitors in Australia

	Visitors Sep QTR 2022	Visitors Sep QTR 2019	Change vs Sep QTR 2019
Total Australia	27,611,000	28,265,000	-2.3%
Holiday	11,859,000	10,573,000	12.2%
VFR ⁴	8,517,000	9,465,000	-10.0%
Business	6,105,000	7,104,000	-14.1%



MAIN BEACH, GOLD COAST



PORT DOUGLAS, CAIRNS & GREAT BARRIER REEF

Domestic Tourism Snapshot

Year ending September 2022

Domestic overnight visitors in Queensland

	Visitors	Annual change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Queensland	24,465,000	20.4%	-5.6%	4.1	0.1
Holiday	10,710,000	22.7%	7.0%	4.5	0.1
VFR	7,978,000	19.1%	-10.8%	3.7	0.2
Business	4,692,000	17.3%	-23.4%	3.9	0.0

Intrastate	18,057,000	10.2%	1.5%	3.3	-0.1
Holiday	7,676,000	9.5%	15.3%	3.4	-0.3
VFR	6,001,000	12.5%	-7.0%	2.8	0.1
Business	3,418,000	6.2%	-13.1%	3.9	0.0

Interstate	6,407,000	62.9%	-21.2%	6.4	-0.2
Holiday	3,034,000	76.6%	-9.5%	7.4	-0.1
VFR	1,977,000	45.0%	-20.6%	6.3	-0.2
Business	1,274,000	62.8%	-42.0%	3.9	0.0

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change	Change vs YE Dec 2019
Total Queensland ⁵	\$24,469.2m	47.6%	25.9%
Holiday ⁶	\$13,291.7m	44.8%	50.8%
VFR ⁶	\$3,561.9m	49.6%	23.4%
Business ⁶	\$2,841.7m	39.6%	-13.6%

More domestic holiday visitors than ever to Queensland

Domestic OVE totalled \$24.5 billion, this is both Queensland's highest ever total domestic OVE and the highest OVE of all the states and territories. This was up 25.9 per cent compared to 2019. As a result, Queensland made the largest gain in market share compared to the pre-COVID-19 period (up 3.9 ppt to 28.0 per cent). The growth in OVE was due to spend per visitor increasing 33.3 per cent to \$1,000. The holiday market leads the way with Queensland welcoming more domestic holiday visitors (10.7 million, up 7.0 per cent compared to 2019). On the back of the increase of record OVE, holiday OVE reached its fifth consecutive record (\$13.3 billion up 50.8 per cent compared to 2019). On top of this, Queensland also reached record levels of visiting friends and relatives OVE (up 23.4 per cent compared to 2019 to \$3.6 billion). On the other hand, the business market is proving slower in its recovery with OVE down 13.6 per cent to \$2.8 billion.

Queensland reached records of both interstate (\$10.6 billion up 15.4 per cent) and intrastate (\$13.8 billion, up 35.3 per cent) OVE. In both cases, OVE growth was largely driven by increases in spend per night. Intrastate spend per night was up 31.8 per cent to \$231 and interstate spend per night was up 24.7 per cent to \$258 compared to 2019. For the interstate market the increase in spend was partly due to visitors staying 1.0 night longer on average so the interstate average length of stay was 6.4 nights. There was a record number of intrastate visitors (up 1.5 per cent to 18.1 million).

Both intrastate and interstate strong in the September quarter

Queensland outperformed the national average growth for both OVE (up 52.5 per cent) and visitation (up 5.8 per cent) in the September quarter of 2022 compared to the September quarter of 2019. This was due in near equal measures to both the interstate and intrastate markets. Intrastate OVE was up 58.8 per cent compared to 2019 and interstate OVE was up by 47.1 per cent.

The growth in OVE in the quarter was predominantly due to holiday visitors, who spent an extra \$1.8 billion in the September quarter of 2022 comparing with the September quarter of 2019. Just under half (41 per cent) of this increase in holiday OVE is attributed to the extra spend on accommodation, followed by food and drink (31 per cent), petrol (9 per cent), organised tours and entertainment (6 per cent) and rental vehicles and taxis (4 per cent). Average Daily Rates (ADR) were up 40 per cent in the September quarter of 2022 compared with the same period in 2019.

Records around the regions

All but one of Queensland's regions reached a record level of OVE in the year ending September 2022. Outback Queensland was the only region to not reach record OVE and this was a result of the region's reliance on business travel. Six regions also welcomed more domestic visitors than ever before - Tropical North Queensland (2.4 million, up 8.1 per cent compared to 2019), Sunshine Coast (4.1 million visitors, steady, up 0.8 per cent compared to 2019), Whitsundays (923,000 visitors, up 14.8 per cent on average over the past three years), Southern Queensland Country (2.5 million, up 11.8 per cent compared to 2019), Fraser Coast (869,000 visitors, up 3.1 per cent on average over the past three years) and Mackay (1.2 million visitors up 4.5 per cent on average over the past three years).

Across the regions, the increase in spend was largely due to the increase in spend on accommodation, food and drink.

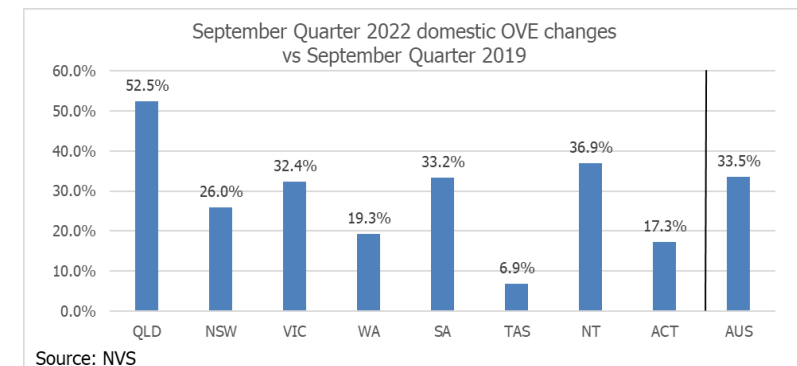
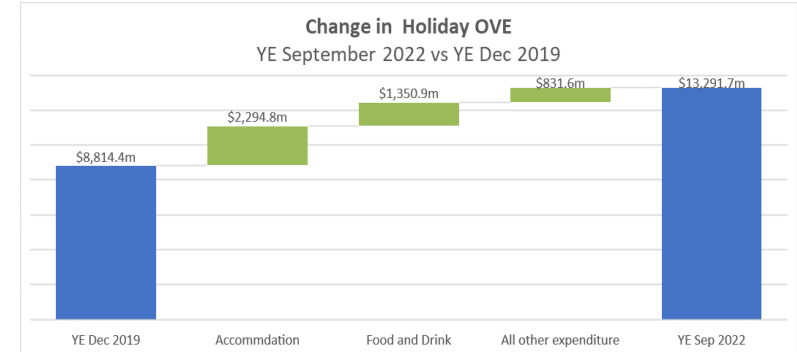
Looking specifically at the September quarter, there was growth in all of the regions and there continued to be a strong recovery in the interstate market.

September quarter 2022 overnight visitors in Queensland

	Visitors Sep QTR 2022	Visitors Sep QTR 2019	Change vs Sep QTR 2019
Total Queensland	6,996,000	6,613,000	5.8%
Holiday	3,104,000	2,598,000	19.5%
VFR ⁴	2,162,000	2,225,000	-2.8%
Business	1,433,000	1,578,000	-9.2%
Overnight Visitor Expenditure	\$8,186.2m	\$5,368.9m	52.5%

September quarter 2022 Queensland interstate vs intrastate

	Visitors Sep QTR 2022	Visitors Sep QTR 2019	Change vs Sep QTR 2019
Visitation			
Interstate	2,299,000	2,234,000	2.9%
Intrastate	4,697,000	4,379,000	7.3%
Overnight Visitor Expenditure			
Interstate	\$4,289.0m	\$2,915.2m	47.1%
Intrastate	\$3,897.2m	\$2,453.8m	58.8%



Source: NVS



Domestic Tourism Snapshot

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Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	24,465,000	20.4%	-5.6%	10,710,000	22.7%	7.0%
Brisbane	6,938,000	27.5%	-15.2%	2,192,000	28.7%	-7.2%
Gold Coast	3,733,000	21.7%	-11.2%	2,101,000	24.8%	-2.9%
Sunshine Coast	4,079,000	13.3%	0.8%	2,452,000	16.7%	10.9%
SQC ⁷	2,493,000	20.6%	11.8%	850,000	23.3%	39.3%
SGBR ⁸	2,238,000	6.0%	-3.4%	838,000	-1.2%	13.9%
Townsville	1,246,000	19.9%	-4.0%	486,000	19.8%	20.5%
TNQ ⁹	2,398,000	23.7%	8.1%	1,399,000	30.9%	21.7%

	Visitors ¹	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	869,000	3.1%	457,000	4.9%
Mackay	1,234,000	4.5%	273,000	13.3%
Outback	910,000	-7.9%	352,000	1.2%
Whitsundays	923,000	14.8%	640,000	20.5%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$24,469.2m	47.6%	25.9%	100%	\$1,000
Brisbane	\$5,471.3m	67.3%	3.0%	22%	\$789
Gold Coast	\$4,203.0m	50.5%	13.9%	17%	\$1,126
Sunshine Coast	\$3,735.9m	42.8%	36.1%	15%	\$916
SQC	\$1,068.7m	36.8%	33.8%	4%	\$429
SGBR	\$1,486.1m	16.2%	24.1%	6%	\$664
Townsville	\$979.2m	35.9%	24.0%	4%	\$786
TNQ	\$4,014.1m	52.5%	60.1%	16%	\$1,674

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$638.4m	16.6%	3%	\$735
Mackay	\$584.0m	4.7%	2%	\$473
Outback	\$681.6m	-1.5%	3%	\$749
Whitsundays	\$1,514.6m	43.6%	6%	\$1,641

September Quarter 2022 overnight visitors and nights, by region

	Visitors Sep QTR 2022	Visitors Sep QTR 2019	Change vs Sep QTR 2019	Nights Sep QTR 2022	Nights Sep QTR 2019	Change vs Sep QTR 2019
Total Queensland	6,996,000	6,613,000	5.8%	31,455,000	28,693,000	9.6%
Brisbane	2,098,000	2,102,000	-0.2%	7,251,000	5,814,000	24.7%
Sunshine Coast	930,000	920,000	1.0%	3,329,000	3,557,000	-6.4%
SQC	706,000	656,000	7.6%	1,767,000	1,690,000	4.6%
Gold Coast	988,000	1,019,000	-3.0%	3,397,000	4,400,000	-22.8%
SGBR	724,000	602,000	20.2%	2,665,000	2,808,000	-5.1%
TNQ	831,000	707,000	17.6%	5,131,000	4,012,000	27.9%
Townsville	396,000	382,000	3.9%	1,528,000	1,282,000	19.1%

Brisbane

Domestic OVE grew by 3.0 per cent to a record \$5.5 billion compared to the year ending December 2019. This was on the back of spend per visitor increasing 21.4 per cent to \$789. Despite the record OVE, visitation to Brisbane was still down compared to 2019 (at 6.9 million, down 15.2 per cent). The holiday market is recovering quicker than other purposes (down 7.2 per cent to 2.2 million), followed by visiting friends and relatives (down 11.2 per cent to 2.9 million). Business visitation continues to be significantly down compared to 2019 (down 34.6 per cent to 1.4 million). By market, intrastate visitation was almost at pre-COVID-19 levels (4.4 million, down 3.5 per cent). Intrastate holiday visitation was at a new record (1.6 million, up 0.2 per cent). Among intrastate markets, Gold Coast was a highlight with a record 676,000 visitors (up 23.6 per cent) coming to Brisbane. Due to border closures in the December quarter 2021, interstate visitation was down over the year (down 30.0 per cent to 2.5 million). Visitation from New South Wales was down 32.3 per cent to 1.4 million compared to 2019 and visitation from Victoria was down 21.2 per cent at 687,000.

In the September quarter of 2022 nights were up 24.7 per cent compared to the September quarter of 2019 and total visitation was steady (down 0.2 per cent). The increase in nights was largely due to the interstate market (up 43.6 per cent), although intrastate nights did also increase (up 4.9 per cent).

Fraser Coast

Annual OVE reached a record \$638.4 million in the year ending September 2022, which was 16.6 per cent higher on average over the past three years. This was on the back of higher spend per visitor and a record number of visitors. Spend per visitor grew 36.8 per cent to \$735 compared to 2019. Total visitation grew by 3.1 per cent on average to a record 869,000. Intrastate visitation grew by 5.6 per cent on average to a record 713,000, while interstate visitation growth was not publishable due to a small visitor survey sample size.

Gold Coast

Domestic OVE for the year ending September 2022 reached a record \$4.2 billion, which was up 13.9 per cent compared with the year ending December 2019. This growth was the result of a 28.2 per cent increase in spend per visitor to \$1,126.

On the other hand, visitation remains below 2019 levels at 3.7 million (down 11.2 per cent). Holiday visitation is approaching pre-COVID-19 levels (at 2.1 million, down 2.9 per cent), but both VFR (1.1 million, down 21.6 per cent) and business visitation (434,000, down 13.3 per cent) remain significantly below 2019 levels. By source market, intrastate visitation is almost equal with pre-COVID-19 levels (2.0 million, down 1.4 per cent). Visitation from Brisbane, the largest source market, is up by 7.2 per cent to 1.5 million compared to 2019. The decrease in visitation over the year was largely due to interstate visitation, which fell 20.2 per cent to 1.7 million compared with 2019. This included a 26.0 per cent decrease in visitation from New South Wales to 926,000 and a 10.1 per cent decrease in visitation from Victoria to 574,000.

Visitation in the September quarter was down 3.0 per cent compared to 2019 and nights were down 22.8 per cent. Interstate visitation decreased 11.7 per cent and interstate nights decreased 35.0 per cent. On the other hand, intrastate visitation was up 8.3 per cent and intrastate nights were up 18.9 per cent.

Mackay

Annual OVE reached a record \$584.0 million in Mackay, which was up 4.7 per cent on average over the past three years. The record spend was on the back of record visitation (1.2 million, up 4.5 per cent on average). Holiday visitation has led the way for Mackay (up 13.3 per cent on average to 273,000), while business visitation has been steady (up 0.6 per cent on average to 663,000). On the other hand, VFR visitation has decreased 2.1 per cent on average to 182,000. The region's visitation is predominantly from the intrastate market (93 per cent of trips), which grew on average by 6.7 per cent over the past three years to a record 1.2 million visitors.

Outback Queensland

Before COVID-19 business visitation accounted for more than half of visitors to Outback Queensland. As a result, the Outback has suffered from a decrease in business visitation over the COVID-19 period. Business visitation was down 19.5 per cent on average over the past three years to 310,000 visitors. As a result, total visitation was down 7.9 per cent on average to 910,000 visitors.

This has also flowed through to total OVE decreasing 1.5 per cent on average to \$681.6 million. On the other hand, holiday visitation (up 1.2 per cent on average to 352,000) and VFR visitation (up 1.6 per cent on average to 185,000) have both grown compared to 2019. Holiday visitor nights reached a new record of 2.0 million (up 12.9 per cent on average). Both intrastate (down 6.5 per cent to 745,000 on average over the past three years) and interstate (down 15.2 per cent on average to 164,000) visitation decreased.

Southern Great Barrier Reef (SGBR)

Domestic OVE grew by 24.1 per cent to a record \$1.5 billion compared to the year ending December 2019. This occurred because the average spend per visitor increased 28.4 per cent to \$664. On the other hand, visitation decreased by 3.4 per cent to 2.2 million. This decline in visitation compared to 2019 was due to business (down 17.5 per cent to 618,000) and VFR visitation (down 14.3 per cent to 594,000). Holiday visitation grew 13.9 per cent to 838,000 compared to 2019. By market, intrastate visitation was in line with pre-COVID-19 levels (2.0 million, down 0.5 per cent). The decrease in visitation was due to the interstate market which was down by 23.2 per cent to 227,000 compared to 2019.

Visitation in the September quarter of 2022 was up 20.2 per cent compared to the September quarter of 2019. However, nights were down 5.1 per cent compared to the September quarter of 2019. The intrastate market was a bit stronger. Intrastate visitation was up 26.2 per cent and intrastate nights were up 9.4 per cent. In the quarter, interstate market numbers are not reportable due to a small sample size.

Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	18,057,000	10.2%	1.5%
Brisbane	4,426,000	11.9%	-3.5%
Gold Coast	1,997,000	4.0%	-1.4%
Sunshine Coast	3,078,000	3.4%	5.0%
SQC	2,095,000	15.6%	16.8%
SGBR	2,012,000	4.5%	-0.5%
Townsville	981,000	7.7%	-7.8%
TNQ	1,590,000	9.6%	6.0%

	Visitors	3-yr trend
Fraser Coast	713,000	5.6%
Mackay	1,150,000	6.7%
Outback	745,000	-6.5%
Whitsundays	648,000	18.3%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	6,407,000	62.9%	-21.2%
Brisbane	2,512,000	69.0%	-30.0%
Gold Coast	1,736,000	51.3%	-20.2%
Sunshine Coast	1,001,000	60.5%	-10.3%
SQC	398,000	55.7%	-8.5%
SGBR	227,000	22.3%	-23.2%
Townsville	264,000	107.4%	13.6%
TNQ	808,000	65.6%	12.7%

	Visitors	3-yr trend
Fraser Coast	156,000	np
Mackay	np	np
Outback	164,000	-15.2%
Whitsundays	274,000	5.3%



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Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	24,465,000	20.4%	-5.6%	10,710,000	22.7%	7.0%
Brisbane	6,938,000	27.5%	-15.2%	2,192,000	28.7%	-7.2%
Gold Coast	3,733,000	21.7%	-11.2%	2,101,000	24.8%	-2.9%
Sunshine Coast	4,079,000	13.3%	0.8%	2,452,000	16.7%	10.9%
SQC ⁷	2,493,000	20.6%	11.8%	850,000	23.3%	39.3%
SGBR ⁸	2,238,000	6.0%	-3.4%	838,000	-1.2%	13.9%
Townsville	1,246,000	19.9%	-4.0%	486,000	19.8%	20.5%
TNQ ⁹	2,398,000	23.7%	8.1%	1,399,000	30.9%	21.7%

	Visitors ¹⁰	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	869,000	3.1%	457,000	4.9%
Mackay	1,234,000	4.5%	273,000	13.3%
Outback	910,000	-7.9%	352,000	1.2%
Whitsundays	923,000	14.8%	640,000	20.5%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$24,469.2m	47.6%	25.9%	100%	\$1,000
Brisbane	\$5,471.3m	67.3%	3.0%	22%	\$789
Gold Coast	\$4,203.0m	50.5%	13.9%	17%	\$1,126
Sunshine Coast	\$3,735.9m	42.8%	36.1%	15%	\$916
SQC	\$1,068.7m	36.8%	33.8%	4%	\$429
SGBR	\$1,486.1m	16.2%	24.1%	6%	\$664
Townsville	\$979.2m	35.9%	24.0%	4%	\$786
TNQ	\$4,014.1m	52.5%	60.1%	16%	\$1,674

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$638.4m	16.6%	3%	\$735
Mackay	\$584.0m	4.7%	2%	\$473
Outback	\$681.6m	-1.5%	3%	\$749
Whitsundays	\$1,514.6m	43.6%	6%	\$1,641

September Quarter 2022 overnight visitors and nights, by region

	Visitors Sep QTR 2022	Visitors Sep QTR 2019	Change vs Sep QTR 2019	Nights Sep QTR 2022	Nights Sep QTR 2019	Change vs Sep QTR 2019
Total Queensland	6,996,000	6,613,000	5.8%	31,455,000	28,693,000	9.6%
Brisbane	2,098,000	2,102,000	-0.2%	7,251,000	5,814,000	24.7%
Sunshine Coast	930,000	920,000	1.0%	3,329,000	3,557,000	-6.4%
SQC	706,000	656,000	7.6%	1,767,000	1,690,000	4.6%
Gold Coast	988,000	1,019,000	-3.0%	3,397,000	4,400,000	-22.8%
SGBR	724,000	602,000	20.2%	2,665,000	2,808,000	-5.1%
TNQ	831,000	707,000	17.6%	5,131,000	4,012,000	27.9%
Townsville	396,000	382,000	3.9%	1,528,000	1,282,000	19.1%

Southern Queensland Country (SQC)

Domestic OVE grew by 33.8 per cent to a record \$1.1 billion compared to 2019. This was on the back of spend per night growing 22.9 per cent to \$166 as well as record visitation and nights. Total nights grew by 8.9 per cent to 6.4 million and total visitors grew 11.8 per cent to 2.5 million. Both holiday (up 39.3 per cent to 850,000) and VFR (up 9.8 per cent to 1.0 million) visitation reached record levels. On the other hand, business visitation was down 13.7 per cent 461,000 compared to the pre-COVID-19 level of visitation. By source market, intrastate visitation reached a new record of 2.1 million (up 16.8 per cent). However, interstate visitation was still down 8.5 per cent compared to 2019 at 398,000 visitors.

Visitation in the September quarter of 2022 was up 7.6 per cent and nights were up 4.6 per cent compared to the September quarter of 2019. Growth was driven by the interstate market, with interstate visitation up 23.6 per cent compared to the September quarter of 2019. Intrastate visitation also grew (up 3.9 per cent).

Sunshine Coast

Sunshine Coast's domestic OVE grew 36.1 per cent to a record \$3.7 billion compared with the year ending December 2019. This was due to record levels of visitation along with spend per visitor increasing 35.0 per cent to \$916. This increase in spend was due to higher spend on accommodation, food and drink. Visitation was steady (up 0.8 per cent) compared to 2019 at a record 4.1 million visitors. Holiday visitation drove the increase reaching a record 2.5 million (up 10.9 per cent). On the other hand both VFR (down 9.9 per cent to 1.3 million) and business (down 34.7 per cent to 235,000) were both down compared to 2019. By source market, intrastate visitation grew 5.0 per cent compared to 2019 at 3.1 million. This included a record number of visitors from the Gold Coast (285,000, up 6.5 per cent). Visitation from Sunshine Coast's largest source market, Brisbane, grew 17.7 per cent to 2.1 million. Interstate visitation was down 10.3 per cent to 1.0 million. Visitation from Victoria was down 6.0 per cent to 369,000 and visitation from New South Wales was down 13.6 per cent to 491,000.

In the September quarter of 2022 visitation grew by 1.0 per cent but nights were down 6.4 per cent compared to the September quarter of 2019. In the September quarter the growth in visitation came from the interstate market (up 2.9 per cent), while intrastate visitation was equal (0.0 per cent change) with 2019. Intrastate nights were down 5.7 per cent and interstate nights were down 7.0 per cent.

Whitsundays

Annual OVE grew by 43.6 per cent on average over the past three years to a record \$1.5 billion. This was on the back of a record 923,000 visitors (up 14.8 per cent on average over the past three years) along with growth in spend per visitor (up 20.7 per cent on average over the past three years to \$1,641). The increase in spend was mostly on accommodation, food and drink. Holiday visitation accounts for 69 per cent of domestic visitors to the region and this grew by 20.5 per cent on average over the past three years to a record 640,000. Reflecting border closures earlier in the year, the growth has been particularly strong for intrastate visitation (up 18.3 per cent on average to 648,000). However interstate visitation still reached a new record of 274,000 visitors (up 5.3 per cent on average).

Townsville

Domestic OVE grew by 24.0 per cent to a record \$979.2 million compared to the pre-COVID-19 year ending December 2019. This was the result of the average spend per night increasing 23.0 per cent to \$203 per night, despite a decline in visitation (down 4.0 per cent to 1.2 million). Total nights were steady (up 0.8 per cent to 4.8 million). Holiday visitation reached a new record, growing by 20.5 per cent to 486,000 compared to the pre-COVID-19 period. The decrease in the number of visitors was due to VFR (down 18.3 per cent to 324,000) and business (down 14.4 per cent to 322,000) visitation both decreasing. Intrastate visitation was also down 7.8 per cent to 981,000. This was due to intrastate VFR (down 19.1 per cent to 260,000) and intrastate business (down 15.2 per cent to 276,000). Interstate visitation was up 16.4 per cent to 264,000.

In the September quarter of 2022, visitation to Townsville was up by 3.9 per cent and nights were up 19.1 per cent compared to the September quarter 2019. Intrastate visitation was in line with the September quarter of 2019 (down 0.6 per cent). Interstate visitation was not reportable due to small sample sizes.

Tropical North Queensland (TNQ)

Domestic OVE reached a record \$4.0 billion (up 60.1 per cent compared to 2019). This was on the back of an increase in spend per night (up 32.3 per cent to \$297) and a record number of both visitors and visitor nights. Total nights were up 21.0 per cent to 13.5 million compared to 2019 and total visitation was up 8.1 per cent at 2.4 million.

Holidays account for 58 per cent of visitors and this market was responsible for the domestic growth in the region. Tropical North Queensland welcomed a record 1.4 million holiday visitors (up 21.7 per cent). Holiday visitors stayed a record 8.3 million nights (up 35.8 per cent). Conversely, VFR visitation was down 10.1 per cent at 485,000 compared with 2019 and business visitation decreased 17.3 per cent to 391,000. By source market, TNQ welcomed a record number of both interstate (808,000 visitors, up 12.7 per cent) and intrastate visitors (up 6.0 per cent to 1.6 million). TNQ welcomed a record number of visitors from Brisbane (up 19.5 per cent to 314,000) and Victoria (up 13.0 per cent to 365,000).

More recently, TNQ had an extremely strong September quarter of 2022. Visitation was up by 17.6 per cent and nights were up by 27.9 per cent compared to the September quarter of 2019. Growth came from both the intrastate and interstate markets. Intrastate visitation was up by 17.2 per cent and interstate visitation was up 18.1 per cent.

Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	18,057,000	10.2%	1.5%
Brisbane	4,426,000	11.9%	-3.5%
Gold Coast	1,997,000	4.0%	-1.4%
Sunshine Coast	3,078,000	3.4%	5.0%
SQC	2,095,000	15.6%	16.8%
SGBR	2,012,000	4.5%	-0.5%
Townsville	981,000	7.7%	-7.8%
TNQ	1,590,000	9.6%	6.0%

	Visitors	3-yr trend
Fraser Coast	713,000	5.6%
Mackay	1,150,000	6.7%
Outback	745,000	-6.5%
Whitsundays	648,000	18.3%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	6,407,000	62.9%	-21.2%
Brisbane	2,512,000	69.0%	-30.0%
Gold Coast	1,736,000	51.3%	-20.2%
Sunshine Coast	1,001,000	60.5%	-10.3%
SQC	398,000	55.7%	-8.5%
SGBR	227,000	22.3%	-23.2%
Townsville	264,000	107.4%	13.6%
TNQ	808,000	65.6%	12.7%

	Visitors	3-yr trend
Fraser Coast	156,000	np
Mackay	np	np
Outback	164,000	-15.2%
Whitsundays	274,000	5.3%



WHITSUNDAY ISLANDS, WHITSUNDAYS

Domestic Tourism Snapshot

Year ending September 2022



State expenditure comparison

	Expenditure	Annual change	Change vs YE Dec 2019	Share of expenditure	Spend per visitor
Total Australia	\$87,531.7m	43.6%	8.5%	100%	\$861
Queensland	\$24,469.2m	47.6%	25.9%	28%	\$1,000
New South Wales	\$24,318.0m	42.5%	2.7%	28%	\$754
Victoria	\$17,101.5m	80.7%	0.7%	20%	\$706
Other States	\$21,642.2m	21.3%	5.0%	25%	\$917

State visitation comparison

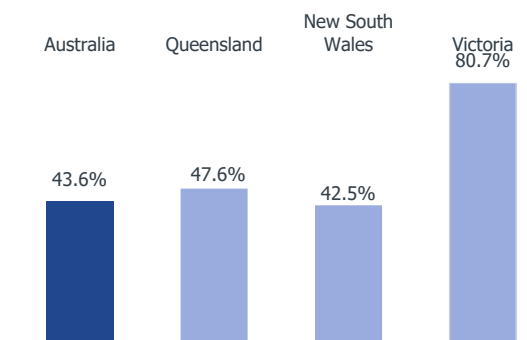
	Visitors	Annual Change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Australia	101,618,000	22.9%	-13.5%	3.7	-0.2
Queensland	24,465,000	20.4%	-5.6%	4.1	0.1
New South Wales	32,265,000	25.3%	-17.2%	3.3	-0.3
Victoria	24,227,000	39.8%	-18.6%	2.9	-0.3
Other States	23,611,000	10.1%	-11.8%	4.2	-0.2

Total holiday	45,289,000	20.9%	-2.0%	3.9	-0.1
Queensland	10,710,000	22.7%	7.0%	4.5	0.1
New South Wales	13,829,000	22.5%	-6.5%	3.5	-0.1
Victoria	11,796,000	44.0%	-5.3%	3.0	-0.3
Other States	10,347,000	3.2%	-2.0%	4.2	0.0

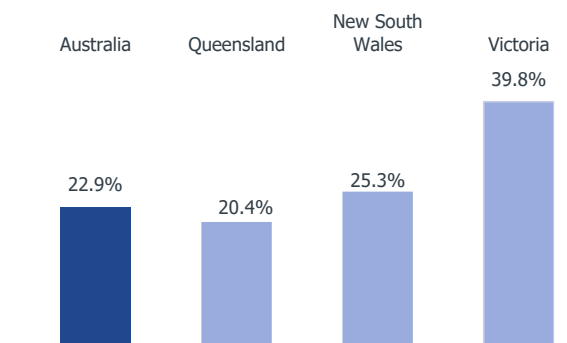
Total VFR	33,515,000	23.6%	-16.1%	3.3	-0.2
Queensland	7,978,000	19.1%	-10.8%	3.7	0.2
New South Wales	11,385,000	28.6%	-19.0%	3.1	-0.2
Victoria	8,134,000	33.2%	-20.9%	2.8	-0.2
Other States	6,529,000	11.4%	-11.1%	3.5	-0.3

Total Business	19,111,000	31.3%	-29.3%	3.7	-0.4
Queensland	4,692,000	17.3%	-23.4%	3.9	0.0
New South Wales	5,634,000	31.0%	-32.4%	3.0	-0.4
Victoria	3,519,000	67.9%	-39.5%	2.7	-0.3
Other States	5,676,000	23.2%	-24.6%	4.7	-0.5

Annual change in visitor expenditure by state Year ending September 2022



Annual change in visitation by state, Year ending September 2022



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 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 own 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/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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