

Domestic Tourism Snapshot

Year ending September 2023

Domestic overnight visitors within Australia

| | Visitors | Annual ¹ Change vs YE Dec 2019 | Avg ² stay | Annual # change |
|------------------------------------|--------------------|---|-----------------------|-----------------|
| Total Australia³ | 111,610,000 | 9.9% | 3.6 | -0.1 |
| Holiday | 47,678,000 | 5.3% | 3.8 | -0.1 |
| VFR ⁴ | 37,212,000 | 11.2% | 3.2 | -0.1 |
| Business | 22,789,000 | 19.2% | 3.6 | -0.1 |

| Intrastate³ | 79,063,000 | 4.2% | -2.8% | 2.9 | -0.1 |
|-------------------------------|-------------------|-------------|--------------|------------|-------------|
| Holiday | 35,262,000 | -0.5% | 3.7% | 3.0 | -0.2 |
| VFR ⁴ | 26,431,000 | 7.9% | -6.9% | 2.4 | -0.1 |
| Business | 13,405,000 | 8.4% | -9.1% | 3.5 | 0.0 |

| Interstate³ | 34,785,000 | 26.6% | -9.3% | 4.9 | -0.4 |
|-------------------------------|-------------------|--------------|--------------|------------|-------------|
| Holiday | 13,537,000 | 26.5% | 2.5% | 5.4 | -0.5 |
| VFR ⁴ | 11,197,000 | 20.5% | -6.2% | 5.0 | -0.2 |
| Business | 9,633,000 | 38.3% | -23.4% | 3.7 | -0.2 |

Domestic overnight visitor expenditure in Australia

| | Expenditure | Annual ¹ Change vs YE Dec 2019 |
|------------------------------------|---------------------|---|
| Total Australia⁵ | \$108,694.2m | 23.8% |
| Holiday ⁶ | \$53,289.3m | 11.9% |
| VFR ⁶ | \$18,787.8m | 25.1% |
| Business ⁶ | \$21,330.4m | 57.8% |



WINTON, OUTBACK

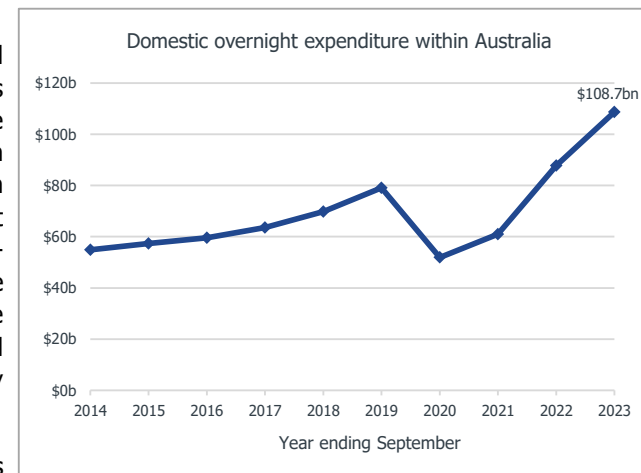
Business travel gains momentum

Domestic overnight visitors in Australia spent a record \$108.7 billion in the year ending September 2023, which is up 23.8 per cent year-on-year. The growth in expenditure is due to Australians travelling more and spending more on average. Total visitation grew 9.9 per cent to 111.6 million and the average spend per visitor increased 12.7 per cent to \$974. However, visitation has not quite reached pre-pandemic levels, down 5.0 per cent compared to the numbers seen in the year ending December 2019. The growth in overnight visitor expenditure (OVE) has occurred across the country but was steady in the Northern Territory (up 0.6 per cent).

Overnight visitor expenditure by business visitors was particularly strong, growing 57.8 per cent year on year to a record of \$21.3 billion and business visitation also had the strongest growth across purposes (up 19.2 per cent to 22.8 million). Visiting friends and relatives (VFR) visitors also spent a record \$18.8 billion (up 25.1 per cent) nationally.

Holiday OVE reached \$53.3 billion, up 11.9 per cent and visitation is 47.7 million, up 5.3 per cent, a modest growth over the year. However, the higher cost of living and weaker economic conditions has taken effect. Outward travel continues an upward trajectory and consumers may be starting to opt for an overseas travel which may come at the expense of interstate holidays. As a result, the average length of stay for interstate holidays has decreased 0.5 nights to 5.4 nights.

Overnight visitor expenditure generated by intrastate visitors reached a record \$60.0 billion (up 15.3 per cent).



COOLUM BEACH, SUNSHINE COAST

Domestic Tourism Snapshot

Year ending September 2023

Domestic overnight visitors in Queensland

| | Visitors | Annual change | Change vs YE Dec 2019 | Avg stay | Annual # change |
|-------------------------|-------------------|---------------|-----------------------|------------|-----------------|
| Total Queensland | 25,214,000 | 3.3% | -2.7% | 4.0 | -0.2 |
| Holiday | 11,045,000 | 3.4% | 10.4% | 4.3 | -0.2 |
| VFR | 7,938,000 | -0.2% | -11.3% | 3.5 | -0.2 |
| Business | 5,255,000 | 12.0% | -14.2% | 3.5 | -0.4 |
| Intrastate | 17,545,000 | -2.6% | -1.3% | 3.1 | -0.2 |
| Holiday | 7,410,000 | -3.3% | 11.3% | 3.1 | -0.3 |
| VFR | 5,582,000 | -6.6% | -13.5% | 2.6 | -0.3 |
| Business | 3,581,000 | 4.9% | -8.9% | 3.4 | -0.5 |
| Interstate | 7,669,000 | 19.9% | -5.7% | 5.8 | -0.6 |
| Holiday | 3,635,000 | 20.2% | 8.5% | 6.8 | -0.6 |
| VFR | 2,356,000 | 19.4% | -5.4% | 5.6 | -0.7 |
| Business | 1,674,000 | 31.2% | -23.7% | 3.5 | -0.4 |

Domestic overnight visitor expenditure in Queensland

| | Expenditure | Annual change | Change vs YE Dec 2019 |
|--------------------------------------|--------------------|---------------|-----------------------|
| Total Queensland ⁵ | \$29,079.5m | 18.5% | 49.6% |
| Holiday ⁶ | \$16,051.6m | 12.3% | 67.5% |
| VFR ⁶ | \$4,546.3m | 14.7% | 37.9% |
| Business | \$4,886.2m | 44.6% | 23.7% |



CURRUMBIN, GOLD COAST

Business expenditure reaching more records

Domestic OVE in Queensland reached \$29.1 billion which is up 18.5 per cent over the year. The growth in OVE in Queensland largely reflects an increase in spend per night (up 20.0 per cent to \$291), but visitation also increased 3.3 per cent to 25.2 million. Total nights were down slightly (down 1.3 per cent to 99.8 million) as visitors decreased their average length of stay by 0.2 nights to 4.0 nights. Compared to the pre-COVID-19 period, total OVE is 49.6 per cent higher, but visitation (down 2.7 per cent) and nights (down 3.1 per cent) are slightly lower.

For the fourth consecutive quarter business travellers to Queensland spent a record amount (up 44.6 per cent year on year to \$4.9 billion). While both OVE from holiday (\$16.1 billion, up 12.3 per cent) and VFR (\$4.5 billion, up 14.7 per cent) also grew, this growth is notably slower than business OVE.

High inflation over the past 18 months and the flow on effect of cost of living has resulted in the growth tapering off. If we look closely at holiday OVE we can see that while visitors are still wanting to spend they are cutting back in other ways. For instance, holiday makers are shortening their trips (thus decreasing ALOS) and spending less on food and drink. This aligns with other research which notes that in the face of higher costs of living people will still travel but look for ways to downsize their trips. Despite this, Queensland remains the leading state for Holiday OVE, ahead of both New South Wales and Victoria.

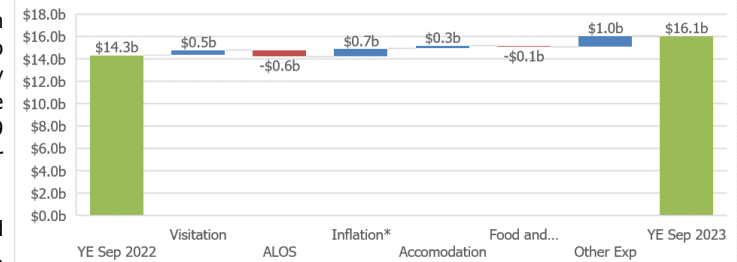
Intrastate OVE in Queensland reached a record of \$15.2 billion (up 9.7 per cent). This has occurred despite intrastate visitation decreasing. Instead it reflects that the average spend per night increased 19.3 per cent over the year to \$276.

Interstate OVE was the largest source of OVE growth in Queensland (up 29.8 per cent to \$13.9 billion). This was in line with the increase in interstate visitation (up by 19.9 per cent to 7.7 million). Over the 12 months there was a large influx of interstate visitation to Queensland due to remaining pent up interstate demand, particularly earlier in the year ending September 2023. Interstate spend per night was up 19.7 per cent to \$310. In the most recent quarters the growth in interstate travel may be tapering off due to cost of living challenges and a preference for Australians to travel overseas. This is apparent in the shortening of interstate ALOS by 0.6 nights over the year to 5.8 nights.

OVE growth across the regions

OVE grew in all regions, both for those whose growth is tracked annually and those whose growth is tracked over a three-year trend. Three regions reached new records. These were Brisbane (\$7.2 billion, up 35.0 per cent), Gold Coast (\$5.8 billion, up 38.4 per cent) and Mackay (\$799.5 million, up 25.4 per cent over the three-year trend).

Change in Holiday Expenditure YE Sep 2022 vs YE Sep 2023



NOOSA HEADS, SUNSHINE COAST

Domestic Tourism Snapshot

Year ending September 2023

Domestic visitors by region

| | Visitors | Annual change | Change vs YE Dec 2019 | Holiday visitors | Annual change | Change vs YE Dec 2019 |
|-------------------------|-------------------|---------------|-----------------------|-------------------|---------------|-----------------------|
| Total Queensland | 25,214,000 | 3.3% | -2.7% | 11,045,000 | 3.4% | 10.4% |
| Brisbane | 7,111,000 | 6.4% | -11.2% | 2,407,000 | 17.1% | 5.4% |
| Gold Coast | 4,420,000 | 18.8% | 5.2% | 2,417,000 | 15.3% | 11.7% |
| Sunshine Coast | 4,161,000 | 2.0% | 2.8% | 2,496,000 | 1.7% | 12.9% |
| SQC ⁷ | 2,483,000 | -8.8% | 3.5% | 882,000 | -9.3% | 26.5% |
| SGBR ⁸ | 2,240,000 | 0.1% | -3.3% | 842,000 | 0.3% | 14.5% |
| Townsville | 1,075,000 | -13.7% | -17.1% | 440,000 | -9.2% | 9.2% |
| TNQ ⁹ | 2,496,000 | 4.5% | 12.5% | 1,454,000 | 4.3% | 26.4% |

| | Visitors ¹ | 3-yr trend | Holiday visitors | 3-yr trend |
|--------------|-----------------------|------------|------------------|------------|
| Fraser Coast | 791,000 | 10.4% | 430,000 | 14.6% |
| Mackay | 1,093,000 | 2.2% | 244,000 | 9.1% |
| Outback | 1,001,000 | 4.2% | 256,000 | 3.7% |
| Whitsundays | 729,000 | 10.5% | 513,000 | 15.8% |

Expenditure in Queensland regions

| | Expenditure | Annual change | Change vs YE Dec 2019 | Share | Spend per visitor |
|-------------------------|--------------------|---------------|-----------------------|-------------|-------------------|
| Total Queensland | \$29,079.5m | 18.5% | 49.6% | 100% | \$1,153 |
| Brisbane | \$7,210.4m | 35.0% | 36.8% | 25% | \$1,014 |
| Gold Coast | \$5,801.2m | 38.4% | 57.2% | 20% | \$1,312 |
| Sunshine Coast | \$4,218.7m | 11.8% | 53.7% | 15% | \$1,014 |
| SQC | \$1,284.2m | 6.8% | 52.8% | 4% | \$517 |
| SGBR | \$1,650.3m | 11.0% | 37.8% | 6% | \$737 |
| Townsville | \$1,104.8m | 10.0% | 39.9% | 4% | \$1,027 |
| TNQ | \$4,180.5m | 4.7% | 66.7% | 14% | \$1,675 |

| | Expenditure | 3-yr trend | Share | Spend per visitor |
|--------------|-------------|------------|-------|-------------------|
| Fraser Coast | \$620.4m | 24.0% | 2% | \$784 |
| Mackay | \$799.5m | 25.4% | 3% | \$731 |
| Outback | \$871.8m | 18.2% | 3% | \$871 |
| Whitsundays | \$1,280.0m | 28.4% | 4% | \$1,756 |

KURANDA, CAIRNS AND GREAT BARRIER REEF



Brisbane

Domestic OVE grew by 35.0 per cent to a record \$7.2 billion in the year ending September 2023. OVE was 36.8 per cent higher than 2019. The growth over the year was due to an increase in visitation as well as an increase in average spend per visitor. Brisbane welcomed 7.1 million visitors (up 6.4 per cent year on year) who spent \$1,014 per visitor on average (up 26.8 per cent). The growth in visitation was largely due to holiday (2.4 million, up 17.1 per cent) and business (1.6 million, up 19.3 per cent) visitation. VFR visitation decreased by 5.2 per cent to 2.7 million. By market, there was particularly strong growth in interstate visitation (up 21.8 per cent to 3.0 million). Visitation from New South Wales was up 20.8 per cent to 1.6 million and visitation from Victoria was up 17.2 per cent to 802,000. Intrastate on the other hand was down 2.6 per cent to 4.1 million visitors. Brisbane's largest intrastate market is intraregional travel with 1.2 million visitors, down 2.7 per cent. Visitation from the Sunshine Coast decreased 5.8 per cent to 605,000; visitation from Southern Queensland Country decreased 17.8 per cent to 576,000 and Gold Coast visitation decreased 16.6 per cent to 543,000.

Fraser Coast

Annual OVE reached \$620.4 million in the year ending September 2023, which was up 24.0 per cent on average over the past three years. This was due to higher spend per night and growth in visitation. Spend per night grew 10.7 per cent on average to \$196 over the past three years. Total visitation grew by 10.4 per cent on average to 791,000 over the same period. The growth in visitation was mostly due to holiday makers. Holiday visitation increased by 14.6 per cent on average over the past three years to 430,000. VFR visitation also grew, increasing 2.4 per cent on average over the past three years to 216,000. Intrastate visitation grew by 7.7 per cent on average over the past three years to 625,000. While Fraser Coast welcomed 166,000 interstate visitors, its growth rate was not reportable due to small sample sizes.

Gold Coast

Domestic overnight visitors spent a record \$5.8 billion on the Gold Coast, an increase of 38.4 per cent over the year and up 57.2 per cent compared to 2019. The growth over the year reflects a record number of domestic visitors on the Gold Coast (4.4 million, up 18.8 per cent). The average spend per visitor also increased by 16.6 per cent to \$1,312 per visitor.

There was a record number of holiday visitors on the Gold Coast (2.4 million) which was up 15.3 per cent over the year. Despite not reaching records, there was strong growth in both business (up 27.4 per cent to 551,000) and VFR visitation (up 23.4 per cent to 1.3 million). More than half of the Gold Coast's domestic visitors were from interstate (2.2 million interstate visitors, up 29.5 per cent). This included a record 746,000 visitors from Sydney (up 54.4 per cent). Visitation from regional New South Wales also grew strongly (up 25.9 per cent to 554,000) while there were 609,000 visitors from Victoria, up 6.2 per cent. There were a record 2.2 million visitors from intrastate, up 9.4 per cent. Brisbane is the Gold Coast's largest intrastate source market with a record 1.6 million visitors, up 7.3 per cent.

Mackay

Annual OVE reached a record \$799.5 million in Mackay, which was up 25.4 per cent on average over the past three years. This largely reflects an increase in spend per visitor (up 23.0 per cent on average to \$731 per visitor over the past three years). Total visitation increased 2.2 per cent on average over the past three years to 1.1 million. Both holiday (up 9.1 per cent on average over the past three years to 244,000) and VFR (up 11.1 per cent on average over the past three years to 222,000) travel increased over the three year trend. Business visitation decreased on average over the three-year trend (down 4.1 per cent on average to 521,000). Intrastate visitation was stable, growing at at 0.1 per cent over the past three years to 976,000.

Outback Queensland

Annual OVE reached a record \$871.8 million, which was up 18.2 per cent on average over the past three years. This is due to both an increase in visitation as well as an increase in the average spend per visitor. The average spend per visitor increased 13.2 per cent on average over the three year trend to \$871 and total visitation increased 4.2 per cent on average over the three year trend to 1.0 million. Visitation grew across purpose of travel. Business is the largest source of visitation, increasing 5.1 per cent on average to 519,000. VFR visitation had the strongest growth, increasing 8.4 per cent on average over the past three years to 168,000. Holiday visitation increased 3.7 per cent on average over the past three years to 256,000. There were 776,000 intrastate visitors which was steady (down 0.1 per cent) on average over the past three years.

Southern Great Barrier Reef

Domestic OVE grew by 11.0 per cent over the year to \$1.7 billion. It was 37.8 per cent higher than 2019. The growth largely reflects an increase in average spend per visitor (up 11.0 per cent to \$737). Total visitation was steady (up 0.1 per cent) over the year at 2.2 million. Among purposes VFR visitation grew (up 9.5 per cent to 652,000), holiday visitation was steady (up 0.3 per cent to 842,000) and business visitation decreased (down 2.2 per cent to 604,000). There was growth from the interstate market (up 21.6 per cent to 277,000), but the majority of visitors come from intrastate, which was down over the year (down 2.4 per cent to 2.0 million). The largest intrastate markets are intraregional travel (649,000 up 14.3 per cent) and Brisbane (503,000, down 21.6 per cent).

Intrastate visitation

| | Visitors | Annual change | Change vs YE Dec 2019 |
|-------------------------|-------------------|---------------|-----------------------|
| Total intrastate | 17,545,000 | -2.6% | -1.3% |
| Brisbane | 4,094,000 | -2.6% | -7.7% |
| Gold Coast | 2,179,000 | 9.4% | 7.5% |
| Sunshine Coast | 3,012,000 | -2.0% | 2.7% |
| SQC | 2,045,000 | -10.6% | 5.2% |
| SGBR | 1,963,000 | -2.4% | -2.9% |
| Townsville | 820,000 | -16.5% | -23.0% |
| TNQ | 1,599,000 | 0.9% | 6.5% |

| | Visitors | 3-yr trend |
|--------------|----------|------------|
| Fraser Coast | 625,000 | 7.7% |
| Mackay | 976,000 | 0.1% |
| Outback | 776,000 | -0.1% |
| Whitsundays | 414,000 | 1.8% |

Interstate visitation

| | Visitors | Annual change | Change vs YE Dec 2019 |
|-------------------------|------------------|---------------|-----------------------|
| Total interstate | 7,669,000 | 19.9% | -5.7% |
| Brisbane | 3,017,000 | 21.8% | -15.6% |
| Gold Coast | 2,242,000 | 29.5% | 3.0% |
| Sunshine Coast | 1,149,000 | 14.3% | 2.9% |
| SQC | 437,000 | 1.0% | -3.7% |
| SGBR | 277,000 | 21.6% | -5.9% |
| Townsville | 255,000 | -3.0% | 9.8% |
| TNQ | 897,000 | 11.6% | 25.1% |

| | Visitors | 3-yr trend |
|--------------|----------|------------|
| Fraser Coast | 166,000 | np |
| Mackay | np | np |
| Outback | 225,000 | 29.4% |
| Whitsundays | 315,000 | 36.6% |



YANDINA, SUNSHINE COAST

Domestic Tourism Snapshot

Year ending September 2023



Domestic visitors by region

| | Visitors | Annual change | Change vs YE Dec 2019 | Holiday visitors | Annual change | Change vs YE Dec 2019 |
|-------------------------|-------------------|---------------|-----------------------|-------------------|---------------|-----------------------|
| Total Queensland | 25,214,000 | 3.3% | -2.7% | 11,045,000 | 3.4% | 10.4% |
| Brisbane | 7,111,000 | 6.4% | -11.2% | 2,407,000 | 17.1% | 5.4% |
| Gold Coast | 4,420,000 | 18.8% | 5.2% | 2,417,000 | 15.3% | 11.7% |
| Sunshine Coast | 4,161,000 | 2.0% | 2.8% | 2,496,000 | 1.7% | 12.9% |
| SQC ⁷ | 2,483,000 | -8.8% | 3.5% | 882,000 | -9.3% | 26.5% |
| SGBR ⁸ | 2,240,000 | 0.1% | -3.3% | 842,000 | 0.3% | 14.5% |
| Townsville | 1,075,000 | -13.7% | -17.1% | 440,000 | -9.2% | 9.2% |
| TNQ ⁹ | 2,496,000 | 4.5% | 12.5% | 1,454,000 | 4.3% | 26.4% |

| | Visitors ¹⁰ | 3-yr trend | Holiday visitors | 3-yr trend |
|--------------|------------------------|------------|------------------|------------|
| Fraser Coast | 791,000 | 10.4% | 430,000 | 14.6% |
| Mackay | 1,093,000 | 2.2% | 244,000 | 9.1% |
| Outback | 1,001,000 | 4.2% | 256,000 | 3.7% |
| Whitsundays | 729,000 | 10.5% | 513,000 | 15.8% |

Expenditure in Queensland regions

| | Expenditure | Annual change | Change vs YE Dec 2019 | Share | Spend per visitor |
|-------------------------|--------------------|---------------|-----------------------|-------------|-------------------|
| Total Queensland | \$29,079.5m | 18.5% | 49.6% | 100% | \$1,153 |
| Brisbane | \$7,210.4m | 35.0% | 36.8% | 25% | \$1,014 |
| Gold Coast | \$5,801.2m | 38.4% | 57.2% | 20% | \$1,312 |
| Sunshine Coast | \$4,218.7m | 11.8% | 53.7% | 15% | \$1,014 |
| SQC | \$1,284.2m | 6.8% | 52.8% | 4% | \$517 |
| SGBR | \$1,650.3m | 11.0% | 37.8% | 6% | \$737 |
| Townsville | \$1,104.8m | 10.0% | 39.9% | 4% | \$1,027 |
| TNQ | \$4,180.5m | 4.7% | 66.7% | 14% | \$1,675 |

| | Expenditure | 3-yr trend | Share | Spend per visitor |
|--------------|-------------|------------|-------|-------------------|
| Fraser Coast | \$620.4m | 24.0% | 2% | \$784 |
| Mackay | \$799.5m | 25.4% | 3% | \$731 |
| Outback | \$871.8m | 18.2% | 3% | \$871 |
| Whitsundays | \$1,280.0m | 28.4% | 4% | \$1,756 |



HAMILTON ISLAND, THE WHITSUNDAYS

Southern Queensland Country (SQC)

Domestic OVE grew by 6.8 per cent over the year to \$1.3 billion, which is 52.8 per cent higher than 2019. The annual growth was due to an increase in average spend per visitor (up 17.0 per cent to \$517). Visitation was down 8.8 per cent to 2.5 million. By purpose, both holiday (down 9.3 per cent to 882,000) and VFR visitation (down 20.9 per cent to 882,000) decreased. Business visitation, on the other hand, increased by 12.9 per cent to 543,000. Interstate visitation increased by 1.0 per cent to 437,000. This included 261,000 visitors from New South Wales, which was steady (down 0.1 per cent) over the year. Intrastate visitation was down 10.6 per cent to 2.0 million. SQC's largest intrastate market is Brisbane, which was down 10.7 per cent to 1.0 million visitors.

Sunshine Coast

Sunshine Coast's domestic OVE grew 11.8 per cent over the year to \$4.2 billion, which is 53.7 per cent higher than 2019. The growth over the year was largely due to a 9.6 per cent increase in the average spend per visitor to \$1,014 and the total number of visitors also increased (up 2.0 per cent to 4.2 million). The Sunshine Coast welcomed a record 2.5 million holiday visitors (up 1.7 per cent). VFR visitation also grew over the year (up 6.3 per cent to 1.3 million), but business visitation was down 1.7 per cent to 231,000. The growth in visitation came from the interstate market (up 14.3 per cent to 1.1 million). This included a record number of visitors from both Sydney (356,000, up 35.5 per cent) and Melbourne (290,000, up 21.0 per cent). Intrastate visitation was down 2.0 per cent to 3.0 million. Visitation from Brisbane, Sunshine Coast's largest market, was steady (0.0 per cent change) at 2.1 million.

Townsville

Domestic OVE grew by 10.0 per cent year-on-year (up 39.9 per cent compared to 2019) to \$1.1 billion. This was the result of spend per night increasing 20.5 per cent over the year to \$251. On the other hand, total visitation was down by 13.7 per cent to 1.1 million and total nights were down 8.7 per cent to 4.4 million. Visitation decreased across all purposes including Business (down 34.2 per cent to 212,000), Holiday (down 9.2 per cent to 440,000) and VFR (down 1.8 per cent to 319,000). Visitation from intrastate decreased 16.5 per cent to 820,000 and visitation from interstate decreased 3 per cent to 255,000.

Tropical North Queensland (TNQ)

Over the year, domestic OVE grew by 4.7 per cent to \$4.2 billion, which was due to a 4.5 per cent increase in visitation to 2.5 million. Domestic OVE is 66.7 per cent above pre-COVID-19 levels. There was a decrease in the average length of stay over the year (down 0.6 nights to 5.0 nights) which led to visitor nights decreasing 7.0 per cent to 12.6 million. However, the average spend per night increased by 12.6 per cent to \$333. Interstate visitation grew by 11.6 per cent to 897,000, led by visitation from New South Wales which was up 23.9 per cent to 344,000. Visitation from Victoria also grew over the year (up 4.1 per cent to 378,000). Visitation from intrastate was steady (up 0.9 per cent) at 1.6 million. However, TNQ welcomed a record number of intra-regional visitors (805,000, up 18.9 per cent) and visitors from Townsville (up 10.9 per cent to 317,000).

Whitsundays

Domestic visitors spent a total of \$1.3 billion, up 28.4 per cent on average over the three-year trend. This was due to both an increase in domestic visitors and average spend per visitor. There were 729,000 domestic visitors to the Whitsundays (up 10.5 per cent on average over the three-year trend). The average spend per visitor increased 22.2 per cent on average to \$1,756 per visitor. Holiday visitation accounts for 70 per cent of domestic visitors to the region and this grew by 15.8 per cent on average over the past three years to 513,000. Most of the growth in visitation came from interstate visitation which was up 36.6 per cent on average to 315,000. Intrastate visitation grew by 3.5 per cent on average to 414,000.

Intrastate visitation

| | Visitors | Annual change | Change vs YE Dec 2019 |
|-------------------------|-------------------|---------------|-----------------------|
| Total intrastate | 17,545,000 | -2.6% | -1.3% |
| Brisbane | 4,094,000 | -2.6% | -7.7% |
| Gold Coast | 2,179,000 | 9.4% | 7.5% |
| Sunshine Coast | 3,012,000 | -2.0% | 2.7% |
| SQC | 2,045,000 | -10.6% | 5.2% |
| SGBR | 1,963,000 | -2.4% | -2.9% |
| Townsville | 820,000 | -16.5% | -23.0% |
| TNQ | 1,599,000 | 0.9% | 6.5% |

| | Visitors | 3-yr trend |
|--------------|----------|------------|
| Fraser Coast | 625,000 | 7.7% |
| Mackay | 976,000 | 0.1% |
| Outback | 776,000 | -0.1% |
| Whitsundays | 414,000 | 1.8% |

Interstate visitation

| | Visitors | Annual change | Change vs YE Dec 2019 |
|-------------------------|------------------|---------------|-----------------------|
| Total interstate | 7,669,000 | 19.9% | -5.7% |
| Brisbane | 3,017,000 | 21.8% | -15.6% |
| Gold Coast | 2,242,000 | 29.5% | 3.0% |
| Sunshine Coast | 1,149,000 | 14.3% | 2.9% |
| SQC | 437,000 | 1.0% | -3.7% |
| SGBR | 277,000 | 21.6% | -5.9% |
| Townsville | 255,000 | -3.0% | 9.8% |
| TNQ | 897,000 | 11.6% | 25.1% |

| | Visitors | 3-yr trend |
|--------------|----------|------------|
| Fraser Coast | 166,000 | np |
| Mackay | np | np |
| Outback | 225,000 | 29.4% |
| Whitsundays | 315,000 | 36.6% |



BALLANDEAN, SOUTHERN QUEENSLAND

Domestic Tourism Snapshot



Year ending September 2023

State expenditure comparison

| | Expenditure | Annual change | Change vs YE Dec 2019 | Share of expenditure | Spend per visitor |
|------------------------|---------------------|---------------|-----------------------|----------------------|-------------------|
| Total Australia | \$108,694.2m | 23.8% | 34.7% | 100% | \$974 |
| Queensland | \$29,079.5m | 18.5% | 49.6% | 27% | \$1,153 |
| New South Wales | \$29,912.8m | 23.0% | 26.4% | 28% | \$828 |
| Victoria | \$22,540.7m | 31.7% | 32.8% | 21% | \$806 |
| Other States | \$27,156.3m | 24.6% | 31.8% | 25% | \$1,051 |

State visitation comparison

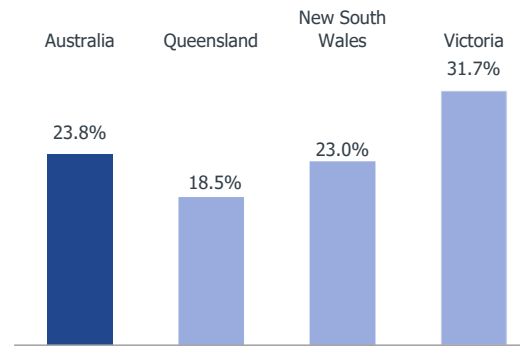
| | Visitors | Annual Change | Change vs YE Dec 2019 | Avg stay | Annual # change |
|------------------------|--------------------|---------------|-----------------------|------------|-----------------|
| Total Australia | 111,610,000 | 9.9% | -5.0% | 3.6 | -0.1 |
| Queensland | 25,214,000 | 3.3% | -2.7% | 4.0 | -0.2 |
| New South Wales | 36,142,000 | 12.2% | -7.3% | 3.2 | -0.1 |
| Victoria | 27,970,000 | 15.6% | -6.0% | 2.9 | 0.0 |
| Other States | 25,828,000 | 9.0% | -3.5% | 4.1 | -0.1 |

| | | | | | |
|----------------------|-------------------|-------------|-------------|------------|-------------|
| Total holiday | 47,678,000 | 5.3% | 3.1% | 3.8 | -0.1 |
| Queensland | 11,045,000 | 3.4% | 10.4% | 4.3 | -0.2 |
| New South Wales | 15,345,000 | 11.2% | 3.7% | 3.3 | -0.1 |
| Victoria | 12,630,000 | 7.2% | 1.4% | 3.0 | 0.0 |
| Other States | 10,359,000 | -0.3% | -1.9% | 4.0 | -0.2 |

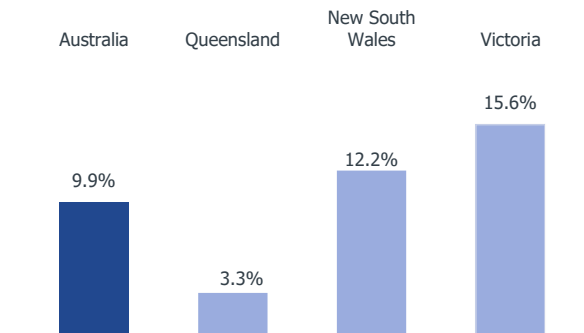
| | | | | | |
|------------------|-------------------|--------------|--------------|------------|-------------|
| Total VFR | 37,212,000 | 11.2% | -6.8% | 3.2 | -0.1 |
| Queensland | 7,938,000 | -0.2% | -11.3% | 3.5 | -0.2 |
| New South Wales | 12,684,000 | 11.7% | -9.8% | 3.1 | 0.0 |
| Victoria | 9,776,000 | 20.3% | -4.9% | 2.7 | -0.1 |
| Other States | 7,512,000 | 14.8% | 2.3% | 3.4 | -0.1 |

| | | | | | |
|-----------------------|-------------------|--------------|---------------|------------|-------------|
| Total Business | 22,789,000 | 19.2% | -15.7% | 3.6 | -0.1 |
| Queensland | 5,255,000 | 12.0% | -14.2% | 3.5 | -0.4 |
| New South Wales | 6,681,000 | 18.6% | -19.9% | 3.0 | 0.0 |
| Victoria | 4,546,000 | 29.4% | -21.8% | 2.9 | 0.2 |
| Other States | 6,748,000 | 18.5% | -10.4% | 4.7 | 0.1 |

Annual change in visitor expenditure by state Year ending September 2023



Annual change in visitation by state, Year ending September 2023



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 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

Strategic Development and Research
Tourism and Events Queensland
e. research@queensland.com
w. teq.queensland.com/research