Domestic Tourism Snapshot

Year ending March 2022

Domestic overnight visitors within Australia

	Visitors	Annual[1] change	Change vs YE Dec 2019	Avg[2] stay	Annual # change
Total Australia[3]	**82,085,000**[3]	**12.7%**	**-30.1%**	**3.9**	**0.0**
Holiday	36,974,000	18.0%	-20.0%	4.0	0.2
VFR[4]	26,962,000	8.7%	-32.5%	3.4	0.0
Business	14,655,000	9.6%	-45.8%	4.1	-0.2
Intrastate[3]	**65,554,000**[3]	**5.4%**	**-19.4%**	**3.3**	**-0.1**
Holiday	30,605,000	9.5%	-10.0%	3.4	-0.1
VFR[4]	20,656,000	1.7%	-27.3%	2.6	-0.1
Business	10,892,000	1.0%	-26.1%	3.9	-0.1
Interstate[3]	**17,901,000**[3]	**54.3%**	**-53.3%**	**5.8**	**-0.3**
Holiday	6,967,000[3]	86.4%	-47.3%	6.2	0.6
VFR[4]	6,531,000[3]	40.3%	-45.3%	5.7	-0.5
Business	4,004,000[3]	44.0%	-68.1%	4.6	-0.8

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual change[1]	Change vs YE Dec 2019
Total Australia[5]	**$63,324.1m**	**38.7%**	**-21.5%**
Holiday[6]	$33,702.5m	41.2%	0.5%
VFR[6]	$9,872.1m	33.7%	-21.6%
Business[6]	$8,221.4m	20.4%	-46.2%

BAMAGA, TROPICAL NORTH QUEENSLAND

Australians releasing pent up demand to travel

While the year ending March 2022 includes three quarters with various COVID-19 related travel restrictions, most of these had been removed for the last three months. A total of 82.1 million domestic overnight trips were taken in Australia in the year ending March 2022, which is down 30.1 per cent compared to the pre-COVID-19 benchmark of the year ending December 2019. Overnight visitor expenditure (OVE) was $63.3 billion, which is 21.5 per cent lower than the year ending December 2019.

National holiday OVE has returned to pre-COVID-19 levels (up 0.5 per cent) at 33.7 billion with Australians continuing to holiday at home when they have been able to. However other travel purposes are still softer; Visiting friends and relatives (VFR) expenditure was down 21.6 per cent to $9.9 billion and Business OVE was 46.2 per cent lower. Even as holiday OVE has returned to pre-COVID-19 levels this has been due to greater spend per night, with holiday visitation remaining below the pre-COVID-19 period (20.0 per cent lower than 2019 at 37.0 million visitors). VFR visitation was 32.5 per cent lower than 2019 at 27.0 million and business visitation was 45.8 per cent lower than 2019 at 14.7 million.

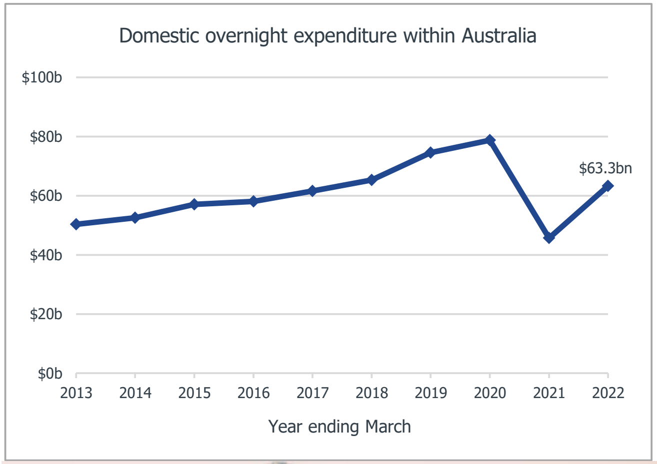
Due to travel restrictions that were in place for the first three quarters, intrastate visitation and OVE continued to outperform interstate nationally. Intrastate visitation decreased 19.4 per cent compared to 2019 to 65.6 million and intrastate OVE was only down 2.5 per cent to $42.2 billion compared to 2019. On the other hand, interstate travel in Australia more than halved (down 53.3 per cent to 17.9 million visitors compared to 2019 and OVE decreased 43.5 per cent to $21.1 billion). Intrastate spend has been boosted by a 0.4 night increase in the intrastate average length of stay to 3.3 nights and a 7.8 per cent increase in the intrastate average spend per night since 2019 to $197 per night. Intrastate holiday OVE has been particularly strong, increasing 27.1 per cent compared to 2019 to $23.2 billion, while both intrastate VFR (down 8.7 per cent to $6.0 billion) and intrastate business OVE (down 24.9 per cent to $4.9 billion) decreased.

A quarter of unrestricted travel

The March quarter 2022 represents the first quarter without any lockdowns and only Western Australia's border restrictions remaining in place (these restrictions ended on 3 March 2022). As a result, total domestic OVE in Australia was 3.3 per cent higher than the March quarter 2019, although visitation was 16.5 per cent lower at 24.6 million. Intrastate OVE was up 15.5 per cent compared to 2019 as the two largest states could once again travel within their states after lockdowns in previous quarters and consumers felt more comfortable travelling within their own state. Interstate OVE was 12.8 per cent lower than March 2019. With restrictions eased people were looking to go on holiday (holiday OVE was up 26.6 per cent to $11.5 billion) or visit friends and relatives (VFR OVE up 6.8 per cent to $3.4 billion) but business travel is still slower to recover (business OVE was down 35.1 per cent to $2.0 billion).

March quarter 2022 overnight visitors in Australia

	Visitors Mar QTR 2022	Visitors Mar QTR 2019	Change vs Mar QTR 2019
Total Australia	**24,623,000**	**29,483,000**	**-16.5%**
Holiday	12,141,000	12,847,000	-5.5%
VFR[4]	8,084,000	9,846,000	-17.9%
Business	3,654,000	5,818,000	-37.2%



SOUTH BRISBANE, BRISBANE

Domestic Tourism Snapshot

Year ending March 2022

Domestic overnight visitors in Queensland

	Visitors	Annual change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Queensland	**20,769,000**	**21.6%**	**-19.9%**	**4.1**	**0.1**
Holiday	9,062,000	32.3%	-9.5%	4.5	0.5
VFR	6,685,000	14.3%	-25.3%	3.5	0.0
Business	4,005,000	15.2%	-34.6%	4.0	-0.4
Intrastate	**16,624,000**	**12.5%**	**-6.5%**	**3.4**	**-0.1**
Holiday	7,099,000	17.5%	6.6%	3.7	0.0
VFR	5,386,000	9.3%	-16.5%	2.7	-0.1
Business	3,185,000	7.1%	-19.0%	4.0	-0.1
Interstate	**4,145,000**	**79.5%**	**-49.0%**	**6.8**	**-0.4**
Holiday	1,963,000	143.9%	-41.4%	7.8	0.3
VFR	1,298,000	40.9%	-47.9%	6.8	-0.2
Business	820,000	63.3%	-62.6%	3.8	-1.6

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change	Change vs YE Dec 2019
Total Queensland [5]	**$17,859.3m**	**47.9%**	**-8.1%**
Holiday [6]	$9,989.1m	61.1%	13.3%
VFR [6]	$2,546.6m	40.4%	-11.8%
Business [6]	$2,038.1m	16.0%	-38.1%


K'GARI (FRASER ISLAND), FRASER COAST

Queensland holiday records continue

The year ending March 2022 (i.e. 1 April 2021 – 31 March 2022) includes a full March quarter where Queensland's borders were open to all interstate travellers after borders were reopened to Victoria and New South Wales on 13 December 2022. For most of the September and December quarter 2021 border were closed to Queensland's largest market (Victoria and New South Wales) and some Queensland regions experienced lockdowns.

Queensland's domestic OVE was down 8.1 per cent to $17.9 billion compared to the year ending December 2019 on the back of visitation decreasing by 19.9 per cent to 20.8 million. Despite the decline at the overall level, domestic holiday OVE reached a record $10.0 billion (up by 13.3 per cent compared to 2019), a record for the third consecutive quarter. The record levels of holiday OVE were largely due to intrastate holiday visitors with intrastate holiday OVE up 51.1 per cent compared to 2019. On the other hand, total domestic VFR OVE was down 11.8 per cent to $2.5 billion and business OVE was down 38.1 per cent to $2.0 billion compared with 2019 levels. The increase in expenditure has predominately been led by an increase in spend on accommodation fuelled by a strong increase in average daily rates (Source: STR).

Intrastate expenditure reached another record over the year, up 12.0% to $11.4 billion compared to 2019. This occurred despite Queensland's total intrastate visitation decreasing 6.5 per cent compared to the pre COVID-19 benchmark of 2019 because intrastate spend per night increased 15.1% to $202.

Interstate visitors march into Queensland in the March quarter

Queensland outperformed the national average and all other states for both OVE (up 19.2 per cent) growth and visitation (down 9.6 per cent) in the March quarter compared to 2019 which was largely due to a strong recovery in interstate market. Interstate expenditure was up by 26.3 per cent compared to 2019 and interstate visitation was only a little below 2019 levels (down 1.5%). In comparison intrastate OVE was up by 13.6 per cent and intrastate visitation was down by 12.8 per cent.

Holiday makers continued to lead the way. OVE in the March quarter was 45.2 per cent or $896 million higher than in March 2019. This growth was split evenly among intrastate and interstate holiday visitors. VFR OVE also grew (up 35.1 per cent) largely driven by interstate visitors making use of the easing of border restrictions to visit friends and family in Queensland. Business OVE, on the other hand, remains down compared to 2019 (down 33.1 per cent).

Two-speed recovery in the midst of some emerging leakage

The two/three speed recovery persists. Tropical North Queensland (up 18.8 per cent vs 2019), Whitsundays (up 22.9 per cent over the three-year trend) and Sunshine Coast (up 5.7 per cent vs 2019) reached record levels of OVE, while OVE also grew in Southern Queensland Country (up 10.7 per cent vs 2019) and Southern Great Barrier Reef (up 5.1 per cent vs 2019). On the other end of the spectrum OVE in Brisbane was down by 36.8 per cent.

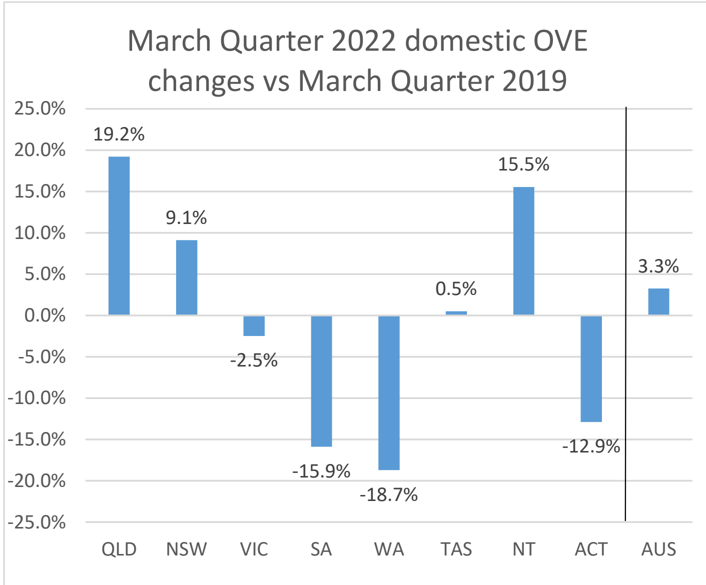
If we look specifically at the March quarter we see evidence that leakage is beginning to occur with large decreases (both year on year and vs. 2019) in intrastate visitation in regions such as Gold Coast, SGBR and Brisbane. In comparison regions that have continued to perform well have experienced a large increase in the number of nights from interstate visitors over the period such as the Sunshine Coast and Tropical North Queensland.

March quarter 2022 overnight visitors in Queensland

	Visitors Mar QTR 2022	Visitors Mar QTR 2019	Change vs Mar QTR 2019
Total Queensland	**5,432,000**	**6,007,000**	**-9.6%**
Holiday	2,407,000	2,335,000	3.1%
VFR [4]	1,863,000	2,056,000	-9.4%
Business	940,000	1,399,000	-32.8%
Overnight Visitor Expenditure	**$5,253.0m**	**$4,407.0m**	**19.2%**

March quarter 2022 Queensland Interstate vs Intrastate

	Visitors Mar QTR 2022	Visitors Mar QTR 2019	Change vs Mar QTR 2019
Visitation			
Interstate	1,708,000	1,734,000	-1.5%
Intrastate	3,724,000	4,273,000	-12.8%
Overnight Visitor Expenditure			
Interstate	$2,443.0m	$1,933.7m	26.3%
Intrastate	$2,810.0m	$2,473.3m	13.6%



Source: NVS

Domestic Tourism Snapshot

Year ending March 2022

Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	**20,769,000**	**21.6%**	**-19.9%**	**9,062,000**	**32.3%**	**-9.5%**
Brisbane	5,214,000	12.6%	-36.2%	1,627,000	20.4%	-31.1%
Gold Coast	3,264,000	33.5%	-22.3%	1,860,000	51.0%	-14.0%
Sunshine Coast	3,708,000	18.2%	-8.4%	2,164,000	16.2%	-2.1%
SQC[7]	2,118,000	19.4%	-5.0%	747,000	50.5%	22.4%
SGBR[8]	1,989,000	8.7%	-14.1%	819,000	24.1%	11.3%
Townsville	1,152,000	57.5%	-11.2%	437,000	56.5%	8.3%
TNQ[9]	2,068,000	39.0%	-6.8%	1,145,000	60.2%	-0.4%

	Visitors[1]	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	683,000	-2.7%	334,000	-5.3%
Mackay	1,128,000	4.3%	254,000	6.5%
Outback	868,000	-5.1%	290,000	-5.8%
Whitsundays	844,000	11.0%	581,000	15.5%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	**$17,859.3m**	**47.9%**	**-8.1%**	**100%**	**$860**
Brisbane	$3,401.2m	34.7%	-36.8%	19.0%	$652
Gold Coast	$3,131.5m	65.6%	-15.2%	17.5%	$959
Sunshine Coast	$2,902.4m	42.2%	5.7%	16.3%	$783
SQC	$807.8m	27.9%	10.7%	4.5%	$381
SGBR	$1,259.1m	21.3%	5.1%	7.0%	$633
Townsville	$760.2m	56.2%	-3.7%	4.3%	$660
TNQ	$2,978.3m	91.0%	18.8%	16.7%	$1,440

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	$369.6m	-1.7%	2.1%	$541
Mackay	$467.6m	-5.3%	2.6%	$414
Outback	$568.8m	-4.9%	3.2%	$655
Whitsundays	$1,139.8m	22.9%	6.4%	$1,351

March Quarter 2022 overnight visitors and nights, by region

	Visitors Mar QTR 2022	Visitors Mar QTR 2019	Change vs Mar QTR 2019	Nights Mar QTR 2022	Nights Mar QTR 2019	Change vs Mar QTR 2019
Total Queensland	**5,432,000**	**6,007,000**	**-9.6%**	**23,719,000**	**23,617,000**	**0.4%**
Brisbane	1,466,000	1,851,000	-20.8%	5,054,000	5,639,000	-10.4%
Sunshine Coast	1,127,000	1,059,000	6.4%	4,425,000	3,721,000	18.9%
SQC	498,000	482,000	3.3%	1,539,000	1,387,000	11.0%
Gold Coast	1,000,000	1,031,000	-3.0%	4,387,000	4,648,000	-5.6%
SGBR	412,000	546,000	-24.6%	1,418,000	2,014,000	-29.6%
TNQ	480,000	389,000	23.2%	2,648,000	1,877,000	41.1%
Townsville	269,000	305,000	-11.5%	990,000	968,000	2.3%

Brisbane

Domestic OVE decreased by 36.8 per cent to $3.4 billion compared to the year ending December 2019 on the back of visitation decreasing by 36.2 per cent to 5.2 million visitors and nights decreasing by 31.9 per cent to 16.1 million. The decline in visitation compared with 2019 was most pronounced for business visitors (down 54.9 per cent to 931,000), while VFR visitation decreased by 31.7 per cent to 2.2 million and holiday visitation decreased by 31.1 per cent to 1.6 million. Interstate visitation (down 60.1 per cent to 1.4 million) experienced a larger decrease compared to 2019 than intrastate visitation (down 17.6 per cent to 3.8 million) due to border closures over the year. Visitation from Victoria was down 63.8 per cent to 316,000, visitation from Sydney was down 61.0 per cent to 423,000 and visitation from regional New South Wales was down 57.2 per cent to 398,000. Among intrastate markets, intraregional travel decreased 6.7 per cent to 1.3 million, visitation from the Sunshine Coast decreased 35.1 per cent to 575,000, but visitation from the Gold Coast grew 2.6 per cent to 561,000.

In the March quarter 2022 visitation was down 20.8 per cent and visitor nights were down 10.4 per cent compared to the pre-COVID-19 December quarter 2019. With borders reopened there were more interstate nights (2.9 million down 2.0per cent compared to March 2019) in Queensland's capital than interstate (2.2 million down 19.4 per cent compared to March 2019) nights.

Fraser Coast

Annual OVE was $369.6 million in the year ending March 2022, which was down 1.7 per cent on average over the past three years. OVE has decreased on the back of visitation being down 2.7 per cent on average over the past three years to 683,000 visitors. Holiday visitation (which makes up 49 per cent of visitors to the region) decreased by 5.3 per cent on average over the past three years to 334,000, while VFR (which accounts for 36 per cent of visitation) was down by 1.4 per cent on average to 244,000. Intrastate visitation was steady (up 0.5 per cent) on average to 598,000, while interstate visitation was not publishable due to a small visitor survey sample size.

Gold Coast

Domestic OVE in the year ending March 2022 decreased by 15.2 per cent to $3.1 billion compared with the year ending December 2019 on the back of visitation decreasing by 22.3 per cent to 3.3 million. The decrease in visitation was most pronounced among business visitors (down 31.9 per cent compared with 2019 to 341,000) and VFR visitors (down 30.8 per cent to 966,000), while holiday visitation (down 14.0 per cent to 1.9 million) held up a bit better. The decrease in visitation over the year is largely due to interstate visitation, which decreased 39.8 per cent to 1.3 million compared with 2019. This included a 45.1 per cent reduction in visitation from Sydney to 381,000, a 40.8 per cent reduction from regional New South Wales to 330,000 and a 29.9 per cent reduction from Victoria to 448,0000. Intrastate visitation was down 3.5 per cent compared to 2019 to 2.0 million. Visitation in the March quarter was down 3.0 per cent compared to the March quarter 2019 and nights were down 5.6 per cent.

The reopening of state borders has led to recovery in the interstate market in the most recent quarter (interstate nights were up 27.0 per cent compared to the March quarter 2019) and but open borders has also meant some Queenslanders have opted to travel elsewhere so that intrastate market nights were down 45.4 per cent.

Mackay

Annual OVE totalled $467.6 million in Mackay, which was down 5.3 per cent on average, even as visitation grew by 4.3 per cent on average over the past three years to a record 1.1 million. This is largely because visitors' average spend per night decreased by 7.8 per cent on average to $108 per night and visitors' average length of stay decreased 1.3 per cent to 3.8 nights. Holiday visitation grew by 6.5 per cent on average over the past three years to 254,000 and business visitation was up by 6.4 per cent on average to 624,000. Only VFR visitation decreased (down 12.2 per cent on average to 146,000). The region's visitation is predominantly from the intrastate market (93 per cent of trips), which grew on average by 6.1 per cent over the past three years to a record 1.1 million visitors.

Outback Queensland

Annual OVE in Outback Queensland decreased by 4.9 per cent on average over the past three years to $568.8 million, on the back of visitation decreasing by 5.1 per cent to 868,000 and nights decreasing by 6.2 per cent to 4.4 million. Holiday visitation was down 5.8 per cent on average to 290,000 and business visitation decreased 5.2 per cent to 384,000. The decrease in visitation was led by a 24.1 per cent on average decrease in interstate visitation to118,000 while intrastate visitation was still steady (down 0.6 per cent on average) at 750,000.

Whitsundays

Annual OVE grew by 22.9 per cent on average over the past three years to a record $1.1 billion on the back of a record 844,000 visitors (up 11.0 per cent on average over the past three years) and spend per night growing by 10.9 per cent on average over the period to $304 per visitor. Total nights grew by 8.0 per cent on to 3.8 million nights. The increase in spend was mostly due to an increase in expenditure on accommodation,. Holiday visitation accounts for 69 per cent of domestic visitors to the region and it grew by 15.5 per cent on average over the past three years to a record 581,000. Intrastate visitation increased by 23.2 per cent on average over the past three years to 662,000.

Southern Great Barrier Reef (SGBR)

Domestic OVE grew by 5.1 per cent to $1.3 billion compared to the year ending December 2019. This was despite visitation decreasing 14.1 per cent to 2.0 million and nights decreasing 21.7 per cent to 7.1 million compared with 2019. Total OVE increased on the back of spend per night increasing 34.2 per cent to $178 per night. The decrease in visitation compared to 2019 was due to business visitation (down 35.9 per cent to 480,000) and VFR visitation (down 22.6 per cent to 537,000). Holiday visitation grew 11.3 per cent to 819,000 compared to 2019. By market, intrastate visitation decreased by 9.6 per cent to 1.8 million, while interstate visitation was down 44.9 per cent to 163,000.

Visitation in the March quarter 2022 was down 24.6 per cent and nights were down 29.6 per cent per cent compared to the March quarter 2019. SGBR's largest domestic market is Brisbane and with interstate borders reopening visitors from Brisbane may have opted to travel elsewhere; intrastate travel was down 20.8 per cent.

Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	**16,624,000**	**12.5%**	**-6.5%**
Brisbane	3,781,000	3.4%	-17.6%
Gold Coast	1,955,000	11.0%	-3.5%
Sunshine Coast	3,041,000	9.9%	3.7%
SQC	1,883,000	17.0%	5.0%
SGBR	1,827,000	5.7%	-9.6%
Townsville	1,009,000	52.2%	-5.2%
TNQ	1,544,000	21.7%	2.9%

	Visitors	3-yr trend
Fraser Coast	598,000	0.5%
Mackay	1,050,000	6.1%
Outback	750,000	-0.6%
Whitsundays	662,000	23.2%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	**4,145,000**	**79.5%**	**-49.0%**
Brisbane	1,433,000	46.9%	-60.1%
Gold Coast	1,309,000	91.8%	-39.8%
Sunshine Coast	667,000	80.4%	-40.2%
SQC	234,000	43.0%	-46.2%
SGBR	163,000	59.2%	-44.9%
Townsville	142,000	np	-38.8%
TNQ	524,000	139.5%	-26.9%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	78,000	np
Outback	118,000	-24.1%
Whitsundays	182,000	np

MURARRIE, BRISBANE

Domestic Tourism Snapshot

Year ending March 2022

Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	**20,769,000**	**21.6%**	**-19.9%**	**9,062,000**	**32.3%**	**-9.5%**
Brisbane	5,214,000	12.6%	-36.2%	1,627,000	20.4%	-31.1%
Gold Coast	3,264,000	33.5%	-22.3%	1,860,000	51.0%	-14.0%
Sunshine Coast	3,708,000	18.2%	-8.4%	2,164,000	16.2%	-2.1%
SQC[7]	2,118,000	19.4%	-5.0%	747,000	50.5%	22.4%
SGBR[8]	1,989,000	8.7%	-14.1%	819,000	24.1%	11.3%
Townsville	1,152,000	57.5%	-11.2%	437,000	56.5%	8.3%
TNQ[9]	2,068,000	39.0%	-6.8%	1,145,000	60.2%	-0.4%

	Visitors[1]	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	683,000	-2.7%	334,000	-5.3%
Mackay	1,128,000	4.3%	254,000	6.5%
Outback	868,000	-5.1%	290,000	-5.8%
Whitsundays	844,000	11.0%	581,000	15.5%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	**$17,859.3m**	**47.9%**	**-8.1%**	**100%**	**$860**
Brisbane	$3,401.2m	34.7%	-36.8%	19.0%	$652
Gold Coast	$3,131.5m	65.6%	-15.2%	17.5%	$959
Sunshine Coast	$2,902.4m	42.2%	5.7%	16.3%	$783
SQC	$807.8m	27.9%	10.7%	4.5%	$381
SGBR	$1,259.1m	21.3%	5.1%	7.0%	$633
Townsville	$760.2m	56.2%	-3.7%	4.3%	$660
TNQ	$2,978.3m	91.0%	18.8%	16.7%	$1,440

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	$369.6m	-1.7%	2.1%	$541
Mackay	$467.6m	-5.3%	2.6%	$414
Outback	$568.8m	-4.9%	3.2%	$655
Whitsundays	$1,139.8m	22.9%	6.4%	$1,351

March Quarter 2022 overnight visitors and nights, by region

	Visitors Mar QTR 2022	Visitors Mar QTR 2019	Change vs Mar QTR 2019	Nights Mar QTR 2022	Nights Mar QTR 2019	Change vs Mar QTR 2019
Total Queensland	**5,432,000**	**6,007,000**	**-9.6%**	**23,719,000**	**23,617,000**	**0.4%**
Brisbane	1,466,000	1,851,000	-20.8%	5,054,000	5,639,000	-10.4%
Sunshine Coast	1,127,000	1,059,000	6.4%	4,425,000	3,721,000	18.9%
SQC	498,000	482,000	3.3%	1,539,000	1,387,000	11.0%
Gold Coast	1,000,000	1,031,000	-3.0%	4,387,000	4,648,000	-5.6%
SGBR	412,000	546,000	-24.6%	1,418,000	2,014,000	-29.6%
TNQ	480,000	389,000	23.2%	2,648,000	1,877,000	41.1%
Townsville	269,000	305,000	-11.5%	990,000	968,000	2.3%

Sunshine Coast

Sunshine Coast's domestic OVE grew 5.7 per cent to a record $2.9 billion compared with the year ending December 2019. This occurred despite visitation decreasing 8.4 per cent to 3.7 million and nights decreasing 8.8 per cent to 13.3 million, as spend per night increased 16.0 per cent to $219 on average. This increase in spend was due to higher spend on accommodation. Holiday visitation (down 2.1 per cent to 2.2 million) held up a better than both VFR (down 14.9 per cent to 1.2 million) and particularly business (down 45.4 per cent to 197,000). For the full year the decrease in visitation has been due to the interstate market (visitation down 40.2 per cent to 667,000). Visitation from New South Wales decreased 42.9 per cent to 324,000 and visitation from Victoria decreased 38.0 per cent to 244,000. On the other hand, intrastate visitation grew 3.7 per cent to 3.0 million, including a record 2.1 million visitors from Brisbane (up 18.0 per cent compared to 2019).

In the March quarter 2022 both visitation (up 6.4 per cent) and nights (up 18.9 per cent) grew compared to the March quarter 2019. This quarter's results contrasted the rest of the year because with the border now open the growth came from the interstate market which could once again enjoy the region (interstate nights were up 60.4 per cent compared to March quarter 2019). On the other hand intrastate nights decreased 5.9 per cent now as Queenslanders were able also able to travel to other states.

Southern Queensland Country (SQC)

Domestic OVE grew by 10.7 per cent to $807.8 million compared to year ending December 2019. Although visitation was down 5.0 per cent to 2.1 million, this was largely offset by a 9.6 per cent increase in average length of stay to 2.9 nights, which lead total nights to increase by 4.1 per cent to 6.1 million. Spend per night also increased by 6.3 per cent to $132 per night compared to 2019. Holiday visitation grew by 22.4 per cent to a record 747,000 compared to2019. On the other hand, VFR visitation (down 16.8 per cent to 782,000) and business visitation (down 17.5 per cent to 440,000) both decreased. The decrease in visitation was due to the interstate market, which was down 46.2 per cent to 234,000, including a 37.5 per cent decrease in visitation from New South Wales to 166,000. Intrastate visitation was 5.0 per cent higher than in 2019 at 1.9 million, including a record 678,000 intrastate holiday visitors (up 43.6 per cent). Visitation from Brisbane was up 13.7 per cent to a record 956,000 compared with 2019.

Visitation in the March quarter 2022 was up 3.3 per cent and nights were 11.0 per cent up compared with the March quarter 2019. SQC visitation continued to grow strong in the March quarter including among visitors from Brisbane, even as interstate borders opened up. Intrastate visitation was up 8.7 per cent and intrastate nights were up 6.8 per cent compared to March quarter 2019.

Tropical North Queensland (TNQ)

Domestic OVE reached a record $3.0 billion (up 18.8 per cent compared to 2019) even as domestic visitation decreased by 6.8 per cent compared with 2019 to 2.1 million. This was on the back of spend per night growing by 23.3 per cent to $276 per night. In particular, the region saw a significant increase in spend on accommodation, while there was also a large increase in spend on food and drink. Holidays account for 55 per cent of visitors to the region and this market held up better than the others. Holiday visitation is now inline (down 0.4 per cent) with 2019 with 1.1 million visitors. VFR visitation was down 28.4 per cent compared with 2019 to 386,000 and business visitation decreased 14.2 per cent to 406,000. The overall decrease in visitation was due to the interstate market, which was down by 26.9 per cent compared with 2019 to 524,000. This included a 39.7 per cent reduction in visitation from Victoria to 194,000 and a 26.8 per cent reduction in visitation from New South Wales to 211,000. Total intrastate visitation increased 2.9 per cent compared to 2019 to a record 1.5 million.

TNQ had an extremely strong March quarter 2022, with visitation up by 23.2 per cent and nights up by 41.1 per cent compared to 2019. The interstate market was particularly strong but the intrastate visitation was still only a little below pre-COVID-19 levels (TNQ was down by 1.5 per cent compared to the March quarter 2019).

Townsville

Domestic OVE decreased 3.7 per cent to $760.2 million compared to the pre-COVID-19 year ending December 2019 which was a smaller reduction than visitation (down 11.2 per cent to 1.2 million) or nights (down 10.4 per cent to 4.3 million). OVE held up better due to spend per night increasing 7.4 per cent to $177 compared to 2019. The decrease in visitation was due to business visitation (down 25.4 per cent to 281,000) and VFR visitation (down 13.0 per cent to 345,000), while holiday visitation increased by 8.3 per cent to 437,000. Interstate visitation was down 38.8 per cent to 142,000 compared with 2019, while intrastate visitation was down 5.2 per cent to 1.0 million. This included a record number of intrastate holiday visitors (up 26.6 per cent to 380,000).

In the March quarter 2022, visitation to Townsville was down 11.5 per cent but nights were up 2.3 per cent compared to the March quarter 2019. With borders re-opening to Queensland there appears to have been some leakage from the intrastate market.

Intrastate visitation

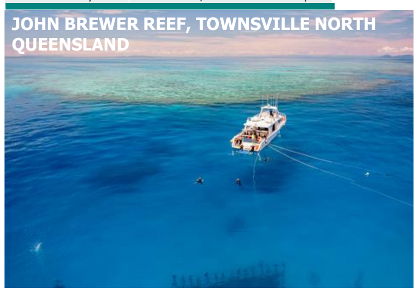
	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	**16,624,000**	**12.5%**	**-6.5%**
Brisbane	3,781,000	3.4%	-17.6%
Gold Coast	1,955,000	11.0%	-3.5%
Sunshine Coast	3,041,000	9.9%	3.7%
SQC	1,883,000	17.0%	5.0%
SGBR	1,827,000	5.7%	-9.6%
Townsville	1,009,000	52.2%	-5.2%
TNQ	1,544,000	21.7%	2.9%

	Visitors	3-yr trend
Fraser Coast	598,000	0.5%
Mackay	1,050,000	6.1%
Outback	750,000	-0.6%
Whitsundays	662,000	23.2%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	**4,145,000**	**79.5%**	**-49.0%**
Brisbane	1,433,000	46.9%	-60.1%
Gold Coast	1,309,000	91.8%	-39.8%
Sunshine Coast	667,000	80.4%	-40.2%
SQC	234,000	43.0%	-46.2%
SGBR	163,000	59.2%	-44.9%
Townsville	142,000	np	-38.8%
TNQ	524,000	139.5%	-26.9%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	78,000	np
Outback	118,000	-24.1%
Whitsundays	182,000	np



JOHN BREWER REEF, TOWNSVILLE NORTH QUEENSLAND

Domestic Tourism Snapshot

Year ending March 2022

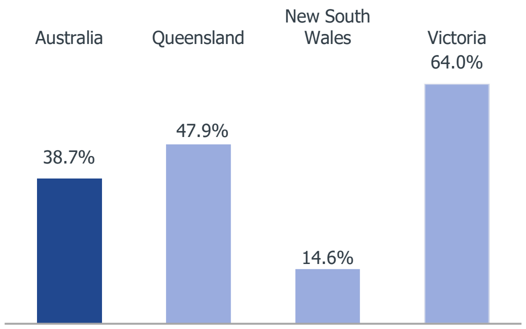
State expenditure comparison

	Expenditure	Annual change	Change vs YE Dec 2019	Share of expenditure	Spend per visitor
Total Australia	**$63,324.1m**	**38.7%**	**-21.5%**	**100.0%**	**$771**
Queensland	$17,859.3m	47.9%	-8.1%	28.2%	$860
New South Wales	$16,730.7m	14.6%	-29.3%	26.4%	$687
Victoria	$10,629.6m	64.0%	-37.4%	16.8%	$585
Other States	$18,104.5m	44.9%	-12.1%	28.6%	$866

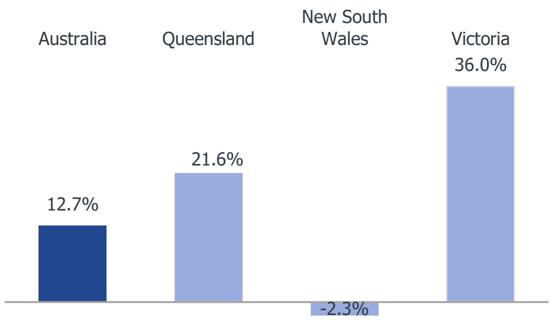
State visitation comparison

	Visitors	Annual Change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Australia	**82,085,000**	**12.7%**	**-30.1%**	**3.9**	**0.0**
Queensland	20,769,000	21.6%	-19.9%	4.1	0.1
New South Wales	24,353,000	-2.3%	-37.5%	3.5	0.0
Victoria	18,157,000	36.0%	-39.0%	3.1	-0.4
Other States	20,896,000	10.5%	-22.0%	4.4	0.2
Total holiday	**36,974,000**	**18.0%**	**-20.0%**	**4.0**	**0.2**
Queensland	9,062,000	32.3%	-9.5%	4.5	0.5
New South Wales	10,428,000	0.1%	-29.5%	3.7	0.1
Victoria	8,571,000	42.9%	-31.2%	3.2	-0.3
Other States	9,730,000	14.2%	-7.9%	4.2	0.4
Total VFR	**26,962,000**	**8.7%**	**-32.5%**	**3.4**	**0.0**
Queensland	6,685,000	14.3%	-25.3%	3.5	0.0
New South Wales	8,656,000	-4.1%	-38.4%	3.3	0.2
Victoria	6,445,000	34.0%	-37.3%	2.9	-0.3
Other States	5,557,000	3.8%	-24.3%	3.6	0.0
Total Business	**14,655,000**	**9.6%**	**-45.8%**	**4.1**	**-0.2**
Queensland	4,005,000	15.2%	-34.6%	4.0	-0.4
New South Wales	4,113,000	-2.6%	-50.7%	3.2	-0.1
Victoria	2,310,000	25.7%	-60.3%	2.9	-0.2
Other States	4,624,000	9.9%	-38.6%	5.3	-0.1

Annual change in visitor expenditure by state
Year ending March 2022



Annual change in visitation by state,
Year ending March 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 centof 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.

Notes:
1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. Avg stay = Average length of stay.
3. Total includes visitors classified as 'Other' purpose. Total Australia includes visitors classified as 'Other/transit' i.e. not allocated to a state/territory.
4. VFR = Visiting friends or relatives.
5. Expenditure including airfares and long distance transport costs.
6. Expenditure excluding airfares and long distance transport costs.
7. SQC = Southern Queensland Country. Region is inclusive of the Toowoomba, South Burnett, Southern Downs and Western Downs regions.
8. SGBR = Southern Great Barrier Reef. Region is inclusive of Capricorn, Gladstone and Bundaberg.
9. TNQ = Tropical North Queensland.
10. Trend change refers to the percentage change between the three years to this year ended, compared to the three years to the prior year ending.

n/p = Not publishable

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