

# Domestic Tourism Snapshot

Year ending June 2016

Domestic Visitors to Australia

	Visitors	Annual change <sup>1</sup>	Avg Stay <sup>2</sup>	Annual change
Total	88,881,000	▲ 6.8%	3.7	▼ -2.6%
Holiday	36,373,000	9.8%	3.9	0.0%
VFR <sup>3</sup>	30,437,000	3.0%	3.3	0.0%
Business	18,637,000	7.9%	3.6	-5.3%

Intrastate	61,450,000	▲ 6.4%	3.0	▼ -3.2%
Holiday	26,532,000	10.1%	3.1	-3.1%
VFR	21,408,000	2.9%	2.5	0.0%
Business	10,287,000	5.7%	3.6	-2.7%

Interstate	29,124,000	▲ 8.0%	4.9	▼ -2.0%
Holiday	10,606,000	9.1%	5.4	0.0%
VFR	9,328,000	3.0%	5.0	-2.0%
Business	8,616,000	12.2%	3.5	-7.9%

Expenditure in Australia

Australia	\$ million	Annual change
Total <sup>4</sup>	\$58,960.9m	▲ 6.4%
Holiday <sup>5</sup>	\$24,797.9m	7.0%
VFR <sup>5</sup>	\$9,355.8m	2.0%
Business <sup>5</sup>	\$10,802.4m	14.4%

## Strong National Growth

The number of Australians travelling domestically hit a historical record reaching 88.9 million visitors, increasing by 6.8 % in the year ending June 2016. All states and territories recorded their highest year ending June visitation figures since June 1999.

## Holiday and Business Drive Results

Recent increases in business travel continued over the year with a very strong 7.9% increase to 18.6 million business visitors across the country. This included intrastate and interstate growth as business travellers continued to increase their travel. The holiday sector increased by 9.8% and is the nation's largest domestic tourism sector. It may be due to sustained consumer confidence, decreased unemployment rates and sustained low Australian dollar. The recent series of terrorism attacks might have also deterred Australians from travelling overseas, but travel more domestically.

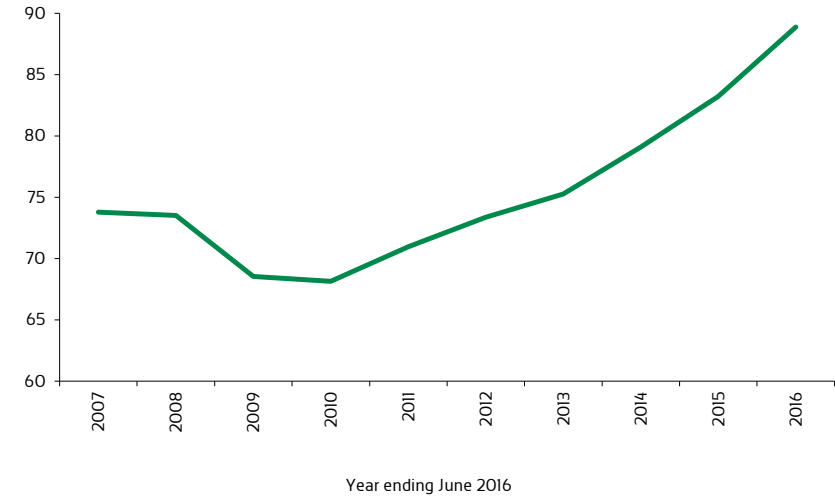
## National Nights

Overall visitor nights grew 4.8% nationally, to 328.4 million nights. This result was largely driven by strong growth of holiday nights. The average length of stay of a domestic traveller in Australia is 3.7 nights, which is marginally less than the year ending June 2015. Holiday nights remained at 3.9.

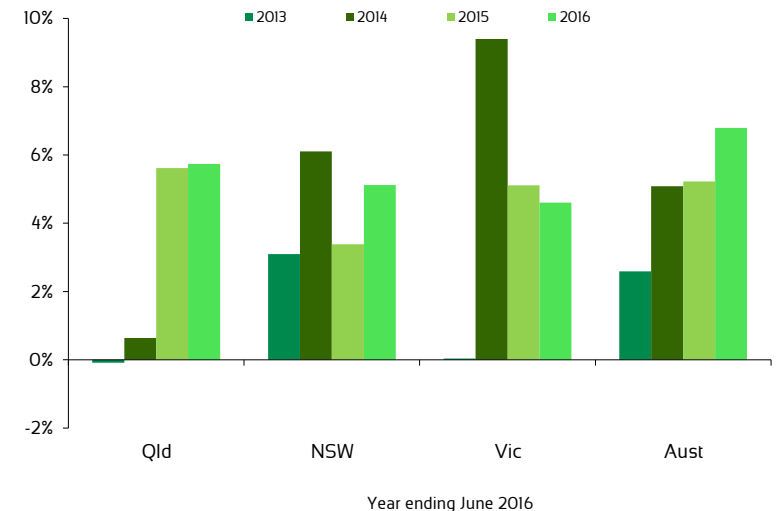
## Money Talks

In the year ended June 2016, \$59.0 billion was spent on domestic overnight travel. The national expenditure growth rate of 6.4% was marginally lower than the growth in visitor numbers, due to the lower growth in visitor nights. Visitor spend per person reached \$663 in the year ending June 2016.

Domestic visitors within Australia (million)



State comparison - domestic visitors (percentage change)



## Year ending June 2016

### Domestic Visitors to Queensland

	Visitors	Annual Change <sup>1</sup>	Avg Stay	Annual change
Total	20,183,000	▲ 5.7%	4.0	▼ -2.4%
Holiday	8,091,000	13.5%	4.4	-2.2%
VFR	6,903,000	3.0%	3.4	-5.6%
Business	4,275,000	-3.4%	3.6	-12.2%

Intrastate	14,099,000	▲ 3.0%	3.2	▼ -5.9%
Holiday	5,430,000	9.2%	3.3	0.0%
VFR	5,065,000	5.0%	2.6	-7.1%
Business	2,881,000	-7.3%	3.7	-11.9%

Interstate	6,083,000	▲ 12.6%	5.8	▼ -3.3%
Holiday	2,661,000	23.3%	6.6	-8.3%
VFR	1,839,000	-1.9%	5.6	0.0%
Business	1,393,000	5.7%	3.5	-7.9%

### Expenditure in Queensland

Queensland	\$ million	Annual change
Total <sup>4</sup>	\$14,630.1m	▲ 7.0%
Holiday <sup>5</sup>	\$6,636.3m	13.0%
VFR <sup>5</sup>	\$2,088.6m	-3.6%
Business <sup>5</sup>	\$2,411.4m	8.2%

### Leisure Travel Shines

The number of domestic overnight visitors in Queensland reached 20.2 million, a record for the year ending June since 1999. This result reflects a growth of 5.7% in the year ending June 2016. The holiday sector drove overall growth (up 13.5% to 8.1 million visitors). This growth was complemented by a 3.0% increase in VFR. Business visitation was down 3.4%, most likely driven by the downturn in the resources sector. Total visitor nights in Queensland increased marginally (1.0%), which suggests that more people are opting for slightly shorter stays in the State. This trend was also seen in most states and territories.

### Staying Put

Intrastate travel remained a key driver of domestic visitation in Queensland with a growth rate of 3.0%. The total number of Queenslanders travelling within the state reached 14.1 million. The intrastate market accounts for 69.9% of all domestic travel to Queensland by visitor number.

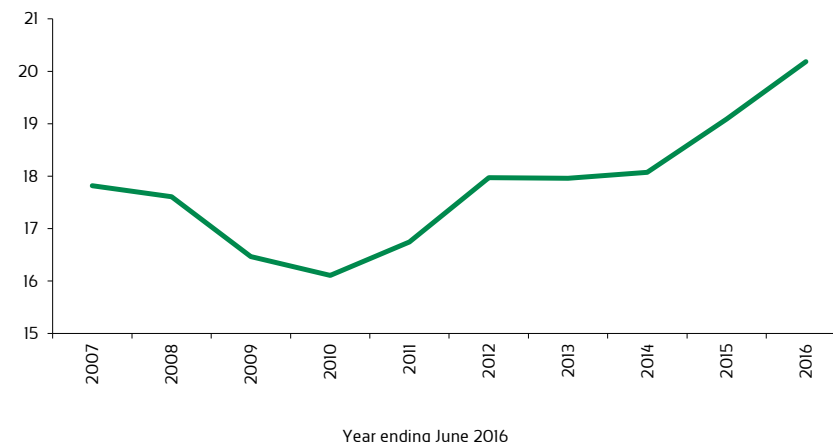
### Interstate Growth

Interstate visitors to Queensland increased by 12.6% over the past year, which is a great result for the State. Holiday and business travel remained the big drivers with 23.3% and 5.7% increases recorded respectively. The number of interstate VFR visitors decreased marginally (-1.9%) in the past year.

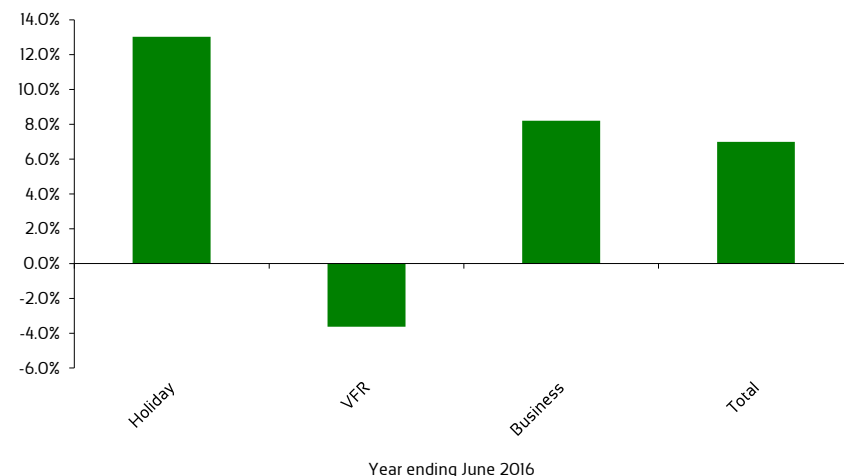
### Expenditure Record

Domestic overnight visitor expenditure in Queensland increased by 7.0% to \$14.6 billion in the year ending June 2016, with growth recorded from the leisure and business sectors. Domestic visitor expenditure accounts for 74% of total spend in the state, compared to 26% for international travellers.

Domestic visitors to Queensland (million)



Annual Change in expenditure in Queensland - Purpose



# Domestic Tourism Snapshot

Year ending June 2016

## Domestic visitors by region

	Visitors	Annual change <sup>1</sup>	Holiday Visitors	Annual change
Brisbane	5,741,000	6.1%	1,556,000	16.7%
Gold Coast	3,723,000	11.8%	1,974,000	12.0%
Sunshine Coast	3,105,000	7.8%	1,823,000	14.9%
Fraser Coast	641,000	14.7%	301,000	8.7%
Southern Qld Country <sup>7</sup>	1,928,000	-3.3%	561,000	15.0%
Southern GBR	1,850,000	-4.1%	535,000	-3.6%
Mackay	756,000	-12.8%	144,000	-2.7%
Whitsundays	508,000	30.6%	334,000	24.6%
Townsville	1,165,000	26.1%	356,000	30.9%
TNQ	2,043,000	13.6%	1,075,000	20.1%
Three Year Trend	Visitors	Trend Change <sup>8</sup>	Holiday Visitors	Trend Change <sup>8</sup>
Outback	548,000	9.4%	181,000	14.6%

### Brisbane

Brisbane experienced a modest growth in domestic visitation (up by 6.1%) to 5.7 million in the year ended June 2016. Despite this, there was a slight decrease in domestic expenditure in the region (down -1.2%) to \$3.4 billion.

### Gold Coast

Domestic overnight visitation to the Gold Coast increased by 11.8% in the year ended June 2016, through strong holiday and VFR growth. Travellers opted for shorter stays on the Gold Coast, with visitor nights remaining relatively steady (down -0.8%). Expenditure rose by 4.3% to \$2.9 billion.

### Sunshine Coast

There was an increase in overall visitation to the Sunshine Coast of 7.8%, as growth from the holiday and business sectors made up for declines from those who were visiting friends and relatives.

### Tropical North Queensland

Domestic visitation to TNQ increased, up by 13.6%. A decline in VFR was bolstered by increases in holiday and business visitation. This drove domestic visitor expenditure up to \$2.3 billion in the year ended June 2016

### Southern Great Barrier Reef

Domestic visitors to the SGBR region decreased by 4.1% in the year ended June 2016, to 1.9 million. Whilst business travel to the SGBR recorded growth of 2.1%, it was a decline in holiday (down 3.6%) and VFR (down 18.4%) travel that impacted overall results. Expenditure also dropped by 2.0% to \$924.8 million.

### Southern Queensland Country

Domestic visitation to SQC declined 3.3% as the CSG boom eases. The good news is that the holiday and VFR sectors increased 15.0% and 3.3% respectively, however, this did not offset declines in business travel.

### Mackay

The downturn in the resources sector continued to adversely affect the Mackay region with a 12.8% decrease in visits and a 31.6% decrease in nights spent in the region - predominantly from business visitors. This loss of visitors and nights also impacted visitor expenditure.

### Townsville

The number of domestic overnight visitors to Townsville continued to increase strongly. The increase was driven largely by holiday visitors.

### Whitsundays

The Whitsundays recorded a 30.6% increase in domestic travel, as growth in the holiday sector drove overall results.

### Fraser Coast

The Fraser Coast continued its recent growth with an increase in domestic visitation of 14.7% in the year ended June 2016. Expenditure decreased by 11.9%, driven by the lowing yielding VFR sector.

### Outback

Domestic visitation to the Outback increased 9.4% on a three year trend basis. This growth was driven by holiday and business visitation (14.6% and 6.7% respectively).

## Intrastate visitors by region

Intrastate	Visitors	Annual change
Brisbane	3,337,000	2.5%
Gold Coast	1,908,000	9.1%
Sunshine Coast	2,400,000	7.9%
Fraser Coast	487,000	15.7%
Southern QLD Country <sup>7</sup>	1,597,000	-3.7%
Southern GBR	1,599,000	-2.5%
Mackay	651,000	-9.6%
Whitsundays	265,000	25.0%
Townsville	888,000	18.7%
TNQ	1,287,000	0.7%

## Interstate visitors by region

Interstate	Visitors	Annual change
Brisbane	2,404,000	11.5%
Gold Coast	1,814,000	14.7%
Sunshine Coast	705,000	7.5%
Fraser Coast	154,000	11.6%
Southern QLD Country <sup>7</sup>	331,000	-0.9%
Southern GBR	250,000	-13.8%
Mackay	104,000	n/p
Whitsundays	243,000	36.5%
Townsville	278,000	58.0%
TNQ	757,000	45.9%

For more insights and data specific to any of the Queensland regions listed above, please refer to the Regional Snapshots which are released quarterly and can be found on our website at [www.teq.queensland.com](http://www.teq.queensland.com)

<sup>7</sup> In order to improve the reliability of information presented for the Toowoomba, South Burnett, Southern Downs and Westerns Downs regions, data for these regions will no longer be reported separately. Data for these regions will now be reported within the Southern Qld Country region in the Domestic Tourism Snapshot.

## Year ending June 2016

### Domestic visitor expenditure<sup>1</sup> in Australia by state

by State	\$ million	Annual change	Share	\$/Visitor
Queensland	\$14,630.1m	7.0%	24.8%	\$724.89
NSW	\$16,379.0m	2.8%	27.8%	\$567.71
VIC	\$11,976.6m	3.3%	20.3%	\$554.73
Other	\$15,975.2m	12.5%	27.1%	\$739.89
Total Australia	\$58,960.9m	6.4%	100%	\$663.37

### Domestic visitor expenditure in Queensland by region

by Region	\$ million	Annual change	Share	\$/Visitor
Brisbane	\$3,388.3m	-1.2%	23.2%	\$590.17
Gold Coast	\$2,920.9m	4.3%	20.0%	\$784.63
Sunshine Coast	\$1,918.1m	6.2%	13.1%	\$617.75
Fraser Coast	\$272.6m	-11.9%	1.9%	\$425.26
Southern QLD Country <sup>7</sup>	\$669.1m	-1.6%	4.6%	\$347.11
Southern GBR	\$924.8m	-2.0%	6.3%	\$482.58
Mackay	\$296.4m	-31.6%	2.0%	\$392.32
Whitsundays	\$516.0m	20.8%	3.5%	\$1,015.38
Townsville	\$925.4m	35.2%	6.3%	\$793.99
Outback <sup>8</sup>	\$332.4m	9.2% <sup>B</sup>	2.3%	\$606.51
TNQ	\$2,279.1m	24.1%	15.6%	\$1,115.44

#### Data Source:

The information included in this report refers to overnight visitor data extracted from the National Visitor Survey, managed by Tourism Research Australia. Approximately 120,000 Australian residents aged 15 and over are surveyed on an annual basis 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 tourism region definitions. These are consistent with current Regional Tourism Organisation boundaries.

#### For Further Information:

Research Department  
Tourism and Events Queensland  
Email: [research@queensland.com](mailto:research@queensland.com)  
Website: [www.teq.queensland.com.au/research](http://www.teq.queensland.com.au/research)

#### 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. VFR: Visiting friends or relatives. Please note: Figures for regional visitation may be impacted by the VFR market. VFR visitors typically stay with friends or family and as such their commercial impact on the tourism industry can be less obvious than that of holiday or business visitors.
4. Expenditure including airfares and long distance transport costs.
5. Expenditure excluding airfares and long distance transport costs.
6. Leisure: the purposes of holiday and VFR combined.
7. The Southern Queensland Country region is inclusive of the Toowoomba, South Burnett, Southern Downs and Western Downs regions.
8. Trend change refers to the percentage change between the three years to this year ended, compared to the three years to the year prior.

Tourism Research Australia have implemented a dual frame methodology to the National Visitor Survey, effective from January 2014. Using a dual frame survey methodology, a portion of the sample is collected from residential landlines and another from mobile phones. This will help overcome potential bias caused by an increasing proportion of Australia's population being outside the scope of the NVS because they live in "mobile phone only" households. For this reason, annual change results are a guide only as they are not directly comparable.

n/p Not publishable

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