

Domestic Tourism Snapshot

Year ending June 2015

Domestic Visitors to Australia

	Visitors	Annual change ¹	Avg Stay ²	Annual change
Total	83,228,000	▲ 5.2%	3.8	▲ 2.7%
Holiday	33,135,000	-0.6%	3.9	-2.5%
VFR ³	29,540,000	5.0%	3.3	-2.9%
Business	17,272,000	15.8%	3.8	15.2%

Intrastate	57,739,000	▲ 4.4%	3.1	● 0.0%
Holiday	24,097,000	-1.8%	3.2	-3.0%
VFR	20,813,000	5.7%	2.5	-3.8%
Business	9,734,000	16.8%	3.7	12.1%

Interstate	26,975,000	▲ 6.8%	5	▲ 2.0%
Holiday	9,717,000	2.3%	5.4	0.0%
VFR	9,060,000	3.5%	5.1	2.0%
Business	7,681,000	14.4%	3.8	15.2%

Expenditure in Australia

Australia	\$ million	Annual change
Total ⁴	\$55,425.7m	▲ 4.0%
Holiday ⁵	\$23,172.0m	1.4%
VFR ⁵	\$9,168.8m	-1.0%
Business ⁵	\$9,445.8m	10.8%

Australians Put Business Before Leisure

The number of Australians travelling domestically grew 5.2% to 83.2 million visitors in the year to June 2015. A strong increase in business travel of 15.8% lifted the overall result and offset a slight decline of 0.6% in holiday visitors nationally. This increase in business travel continued a trend of positive increases seen over the recent surveys.

Local Lustre

Intrastate travel continued as Australia's largest domestic source market with 69.4% share. While overall intrastate travel increased 4.4% nationally, intrastate holiday travel continued recent softening with a 1.8% decline over the year. Local business increased its domestic travel with intrastate business the key driver of 16.8% growth in business travel nationally.

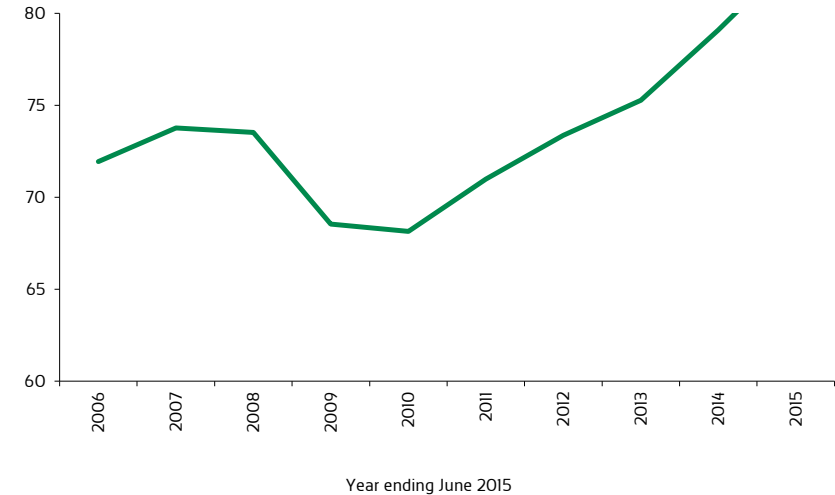
Interstate Up

Interstate travel improved 6.8% overall, underpinned by strong growth of 14.4% in business travel. There were additional increases in holiday and VFR.

Softer Spending

Overnight visitor expenditure within the domestic market in Australia increased 4.0% in the year to June 2015, with total spend reaching \$55.4 billion. Business travel expenditure increased 10.8% to reach a record \$9.4 billion. Overnight expenditure for holiday and VFR travel was subdued over the year. Holiday expenditure remained the largest share of total expenditure with a 52.5% share.

Domestic visitors within Australia (million)



State comparison - domestic visitors (percentage change)



Year ending June 2015

Domestic Visitors to Queensland

	Visitors	Annual Change ¹	Avg Stay	Annual change
Total	19,088,000	▲ 5.6%	4.1	▼ -2.4%
Holiday	7,129,000	-6.5%	4.5	0.0%
VFR	6,699,000	7.4%	3.6	-7.7%
Business	4,425,000	28.0%	4.1	10.8%

	Visitors	Annual Change ¹	Avg Stay	Annual change
Intrastate	13,685,000	▲ 7.8%	3.4	▼ -2.9%
Holiday	4,971,000	-5.2%	3.3	-5.7%
VFR	4,823,000	10.5%	2.8	-9.7%
Business	3,107,000	30.1%	4.2	10.5%

	Visitors	Annual Change ¹	Avg Stay	Annual change
Interstate	5,404,000	● 0.5%	6.0	▲ 1.7%
Holiday	2,158,000	-9.4%	7.2	7.5%
VFR	1,875,000	0.2%	5.6	0.0%
Business	1,318,000	23.4%	3.8	8.6%

Expenditure in Queensland

Queensland	\$ million	Annual change
Total ⁴	\$13,673.6m	▼ -0.7%
Holiday ⁵	\$5,871.3m	-7.7%
VFR ⁵	\$2,167.2m	-8.9%
Business ⁵	\$2,228.4m	18.5%

Queensland Business Hits the Road

The number of domestic overnight visitors to Queensland increased 5.6% to 19.1 million in the year to June 2015. This growth was driven by the business sector, which echoed the continued growth nationally with a strong 28.0% increase to 4.4 million business travellers. The powerhouse behind this was the 30.1% growth in intrastate business travel. This travel within the state delivered 3.1 million visitors. Business travel reached 23.2% share of all domestic visitors to Queensland.

The number of domestic visitor nights spent in Queensland increased 4.1% to 79.2 million nights, which meant a slightly lower average length of stay in Queensland of 4.1 nights. The holiday sector had the longest time in the State (4.5 nights) compared to business travellers and 3.6 nights for VFR travellers.

Home State

Intrastate travel remained the major driver of domestic visitation growth in Queensland and reached a 71.7% share of domestic visitors within Queensland through the 7.8% growth over the year. Intrastate business travel was the driver of intrastate growth with some support from VFR, however intrastate holiday travel actually declined 5.2% during the year.

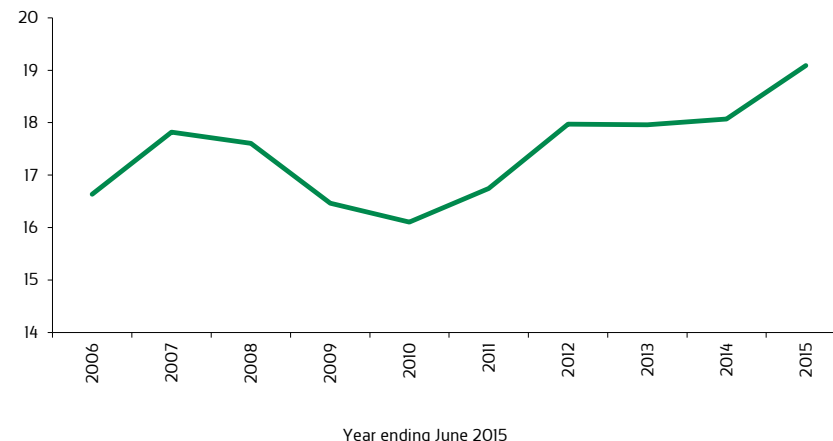
Interstate Mates

There was a slight increase in interstate travel to Queensland in the year to June 2015 (up 0.5%), driven mostly by growth in the business sector. As was the case with national results, interstate holiday travel softened.

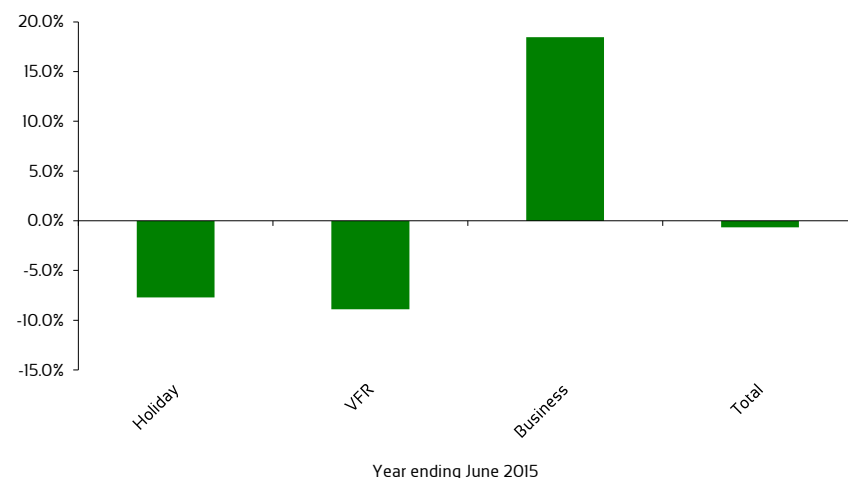
Expenditure Impacted

Domestic overnight visitor expenditure in Queensland remained essentially stable at \$13.7 billion, supported by a strong 18.5% lift in business expenditure.

Domestic visitors to Queensland (million)



Annual Change in expenditure in Queensland - Purpose



Year ending June 2015

Domestic visitors by region

	Visitors	Annual change ¹	Holiday Visitors	Annual change
Brisbane	5,413,000	4.7%	1,333,000	-8.8%
Gold Coast	3,329,000	-5.9%	1,763,000	-19.4%
Sunshine Coast	2,873,000	2.8%	1,583,000	1.7%
Fraser Coast	566,000	3.7%	281,000	0.4%
Southern Qld Country ⁷	1,993,000	11.8%	488,000	-7.9%
Southern GBR	1,930,000	14.9%	555,000	5.9%
Mackay	867,000	28.6%	148,000	11.3%
Whitsundays	389,000	-21.4%	268,000	-13.8%
Townsville	924,000	-1.6%	272,000	-17.3%
TNQ	1,798,000	10.6%	895,000	-1.0%
Three Year Trend	Visitors	Trend Change ⁸	Holiday Visitors	Trend Change ⁸
Outback	420,000	-5.6%	122,000	-9.2%

Brisbane

There was a record level of domestic expenditure in Brisbane after a 6.7% increase to \$3.4 billion in the year ended June 2015. Overall visitation increased 4.7%. Intraregional travel remained one of Brisbane's largest source markets at 12.1%.

Gold Coast

Domestic overnight visitors to the Gold Coast declined 5.9% in the year to June 2015, the result of a 19.4% decrease in holiday travel to the region. With holidaymakers comprising 53.0% of all visitors, the Gold Coast was unable to avoid a national softening of holiday travel. VFR and business travel increased, but this was unable to offset the abovementioned holiday declines.

Sunshine Coast

The Sunshine Coast increased overall visitation by 2.8% to 2.9 million, with a slight 1.7% increase in holiday visitors. A strong lift in business travel helped increase expenditure by 3.1% to \$1.8 billion.

Tropical North Queensland

Domestic visitation to TNQ saw good growth with a 10.6% increase in overall visitation over the year. The slight decline in holiday visitors was offset by a strong lift in business travel. This business travel was predominantly intrastate with a large proportion intraregional. TNQ's largest domestic source market remains intraregional travel with 37.8% share.

SGBR

Domestic visitation to the SGBR region increased 14.9% in the year to June 2015, which was one of the strongest increases in the state. Holiday visitors increased 5.9% lifting total holiday visitors to 555,000. VFR increased 19.4% and business grew 22.2% over the year. VFR had the largest share of visitors to the region with 33.2%.

Southern Queensland Country

Domestic visitation to SQC increased 11.8% in the year to June 2015, driven by strong growth of 25.6% in the business sector. Business travel accounted for 32.0% of all visitors to the region and 48.8% of nights. The region also attained more modest growth VFR travel.

Mackay

Mackay recorded the strongest result of all Queensland regions in the year to June 2015, up 28.6% to 867,000 domestic visitors. This was driven by the business and holiday sectors, which bolstered overnight visitor expenditure.

Townsville

The number of domestic visitors to Townsville declined 1.6% during the last year, driven by a softer holiday market in line with the national results. This caused a similar decrease in domestic spend within the region.

Whitsundays

The Whitsundays recorded a 21.41% decline in domestic holiday visitors in the year to June 2015, driven by fewer holiday and VFR travellers to the region. Given the region's reliance on the holiday sector, visitor expenditure declined accordingly.

Fraser Coast

Domestic visitation to the Fraser Coast region rose modestly at 3.7% in the year to June 2015, driven by a sharp rise in business travel that underpinned a rise in visitor expenditure.

Outback

Domestic travel to the Outback was down slightly (-5.6%) in the three years to June 2015. Growth in the VFR and business not quite sufficient to offset a decline in holiday travel.

Intrastate visitors by region

Intrastate	Visitors	Annual change
Brisbane	3,256,000	4.8%
Gold Coast	1,749,000	-1.9%
Sunshine Coast	2,217,000	5.1%
Fraser Coast	428,000	3.1%
Southern QLD Country ⁷	1,659,000	12.9%
Southern GBR	1,640,000	11.1%
Mackay	720,000	19.8%
Whitsundays	212,000	-35.2%
Townsville	748,000	-3.4%
TNQ	1,278,000	17.6%

Interstate visitors by region

Interstate	Visitors	Annual change
Brisbane	2,157,000	4.5%
Gold Coast	1,581,000	-9.9%
Sunshine Coast	656,000	-4.2%
Fraser Coast	138,000	5.3%
Southern QLD Country ⁷	334,000	6.7%
Southern GBR	290,000	42.2%
Mackay	147,000	n/p
Whitsundays	178,000	6.0%
Townsville	176,000	6.7%
TNQ	519,000	-3.7%

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

⁷ In order to improve the reliability of information presented for the Toowoomba, South Burnett, Southern Downs and Western 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 2015

Domestic visitor expenditure¹ in Australia by state

by State	\$ million	Annual change	Share	\$/Visitor
Queensland	\$13,673.6m	-0.7%	24.7%	\$716.33
NSW	\$15,933.5m	4.1%	28.7%	\$580.53
VIC	\$11,598.7m	5.3%	20.9%	\$561.97
Other	\$14,203.7m	7.5%	25.6%	\$747.86
Total Australia	\$55,425.7m	4.0%	100%	\$665.94

Domestic visitor expenditure in Queensland by region

by Region	\$ million	Annual change	Share	\$/Visitor
Brisbane	\$3,429.1m	6.7%	25.1%	\$633.50
Gold Coast	\$2,801.3m	-12.3%	20.5%	\$841.38
Sunshine Coast	\$1,800.7m	3.1%	13.2%	\$626.74
Fraser Coast	\$313.3m	6.5%	2.3%	\$553.63
Southern QLD Country ⁷	\$679.7m	-8.7%	5.0%	\$340.99
Southern GBR	\$943.3m	1.3%	6.9%	\$475.69
Mackay	\$433.2m	37.4%	3.2%	\$499.70
Whitsundays	\$427.1m	-27.2%	3.1%	\$1,096.55
Townsville	\$684.7m	0.3%	5.0%	\$741.38
Outback ⁸	\$235.9m	-18.4%	1.7%	\$562.17
TNQ	\$1,836.0m	8.7%	13.4%	\$1,021.41

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:

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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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