

Domestic Tourism Snapshot

Year ending December 2022



Domestic overnight visitors within Australia

	Visitors	Annual ¹ Change vs change YE Dec 2019	Avg ² stay	Annual # change	
Total Australia³	108,212,000	31.8%	-7.9%	3.7	-0.2
Holiday	47,647,000	29.0%	3.1%	3.9	-0.1
VFR ⁴	35,522,000	31.2%	-11.1%	3.3	-0.1
Business	21,427,000	48.2%	-20.8%	3.6	-0.5
Intrastate³	76,958,000	15.2%	-5.4%	3.0	-0.3
Holiday	35,547,000	14.6%	4.5%	3.1	-0.4
VFR ⁴	25,104,000	18.7%	-11.6%	2.5	-0.1
Business	12,789,000	15.1%	-13.3%	3.6	-0.3
Interstate³	33,383,000	100.8%	-12.9%	5.1	-1.0
Holiday	13,180,000	103.9%	-0.2%	5.7	-0.6
VFR ⁴	10,822,000	75.6%	-9.3%	5.1	-1.0
Business	8,858,000	148.1%	-29.5%	3.6	-1.4

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual ¹ Change vs change YE Dec 2019
Total Australia⁵	\$101,258.4m	66.7%
Holiday ⁶	\$49,621.0m	53.2%
VFR ⁶	\$15,687.8m	65.1%
Business ⁶	\$14,481.7m	81.7%



BRISBANE CITY, BRISBANE

Records around the Nation

The year ending December 2022 (i.e. 1 January 2022 – 31 December 2022) National Visitor Survey (NVS) data captures the first full year of national visitation results with no travel restrictions after close to three years of travel restrictions imposed due to COVID-19.

Domestic visitors in Australia spent a record \$101.3 billion, which is 25.5 per cent higher than the pre-COVID-19 benchmark year ending December 2019 and 66.7 per cent higher than in 2021. The record overnight visitor expenditure (OVE) is due to spend per visitor being 36.2 per cent higher than before COVID-19 at \$936. There were 108.2 million domestic trips within Australia. Visitation is recovering strongly, up 31.8 per cent from 2021 when COVID-19 was still causing lockdowns and border closures in various states. However, despite the growth from 2021, visitation has not returned to the pre-COVID-19 levels and was still slightly down by 7.9 per cent compared to 2019.

All states and territories reached record levels of domestic overnight visitor expenditure, resulting in record domestic overnight visitor expenditure in Australia.

Nationally the increase in OVE has been led by holiday travellers. Holiday OVE reached a record \$49.6 billion, which is 48.0 per cent higher than before COVID-19. Australians also took a record 47.6 million holiday trips, which is 3.1 per cent more than in 2019 and 29.0 per cent more than in 2021. The growth in visitation compared to 2019 has been due to intrastate holiday visitation, with a record 35.5 million intrastate holiday trips in 2022, up 4.5 per cent compared to 2019. With all border restrictions having been lifted in 2022, interstate holiday travel has grown the most compared to 2021. There were 13.2 million interstate holiday trips which is more than double (up 103.9 per cent) the number of trips in 2021. This was inline (down 0.2 per cent) with the pre-COVID-19 level number of interstate holiday trips.

Visiting Friends and Relatives (VFR) OVE reached a record \$15.7 billion (up 24.7 per cent compared to 2019) from 35.5 million visitors (down 11.1 per cent compared to 2019). However, business travel still trails behind the other travel purposes and has not yet recovered to pre-COVID-19 levels. Business OVE was down 5.2 per cent compared to pre-COVID-19 levels at \$14.5 billion. Business visitation was down 20.8 per cent to 21.4 million.

There were record levels of both intrastate and interstate OVE. Intrastate OVE reached \$55.7 billion, which is up 28.7 per cent compared to 2019 and up 34.4 per cent compared to the previous year. Intrastate visitation is edging closer to 2019 levels, down 5.4 per cent at 77.0 million. Interstate OVE was \$45.6 billion, up 21.8 per cent compared to 2019 and up 136.1 per cent compared to 2021. However interstate visitation was still down by 12.9 per cent compared to 2019.

Growth continues in the December quarter

The December quarter 2022 is the fourth quarter since March 2020 without any lockdowns or domestic travel restrictions apart from Western Australia. Total domestic OVE in Australia was significantly higher (up 34.4 per cent) compared to the December quarter 2019. This was mostly due to spend per visit increasing 42.7 per cent to \$991. Total visitation was down 5.8 per cent compared to the December quarter 2019.

December quarter 2022 overnight visitors in Australia

	Visitors Dec QTR 2022	Visitors Dec QTR 2019	Change vs Dec QTR 2019
Total Australia	27,711,000	29,423,000	-5.8%
Holiday	11,304,000	10,870,000	4.0%
VFR ⁴	9,662,000	10,531,000	-8.3%
Business	5,895,000	6,925,000	-14.9%

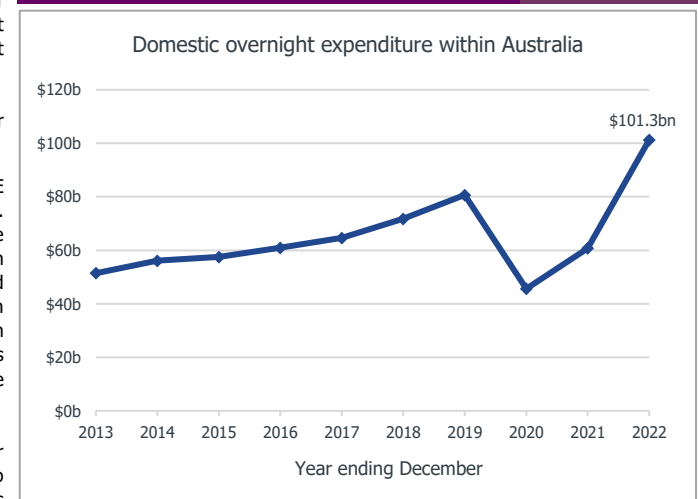


FIG TREE POCKET, BRISBANE

Domestic Tourism Snapshot



Year ending December 2022

Domestic overnight visitors in Queensland

	Visitors	Annual change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Queensland	25,591,000	25.0%	-1.2%	4.1	0.1
Holiday	11,032,000	23.3%	10.2%	4.6	0.1
VFR	8,373,000	26.2%	-6.4%	3.7	0.3
Business	5,217,000	34.6%	-14.9%	3.7	-0.2

Intrastate	17,505,000	3.8%	-1.6%	3.2	-0.2
Holiday	7,171,000	-1.3%	7.7%	3.3	-0.4
VFR	5,957,000	9.7%	-7.7%	2.8	0.1
Business	3,553,000	10.6%	-9.6%	3.7	-0.1

Interstate	8,085,000	123.9%	-0.6%	6.0	-1.0
Holiday	3,861,000	129.4%	15.2%	6.9	-1.0
VFR	2,416,000	100.4%	-3.0%	5.9	-0.8
Business	1,664,000	150.2%	-24.2%	3.7	-0.5

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change	Change vs YE Dec 2019
Total Queensland ⁵	\$27,768.8m	65.2%	42.8%
Holiday ⁶	\$14,561.8m	53.4%	65.2%
VFR ⁶	\$4,052.7m	72.1%	40.3%
Business ⁶	\$3,533.0m	85.0%	7.4%

New records set in Queensland

Queensland reached record levels of expenditure across all purposes of travel, i.e. holiday, leisure, VFR, business and total OVE respectively. Domestic OVE in Queensland totalled \$27.8 billion, this is Queensland's highest ever total domestic OVE and is up 42.8 per cent compared to 2019. The growth in OVE was due to spend per visitor increasing 44.6 per cent to \$1,085 largely due to spend on accommodation and food and drink. The increase in spend was despite Queensland's total visitation still being 1.2 per cent lower than 2019 at 25.6 million.

The holiday market lead the way, with Queensland welcoming more domestic holiday visitors than ever (11.0 million, up 10.2 per cent compared to 2019). Queensland had the highest amount of domestic holiday overnight visitor expenditure among all of the states and territories. As a result, holiday OVE reached its sixth consecutive record (\$14.6 billion up 65.2 per cent compared to 2019).

It is worth noting that business OVE in Queensland is reaching new records (\$3.5 billion, up 7.4 per cent) even as nationally it remains below pre-COVID-19 levels. All of this growth in business OVE compared to 2019 occurred in the December quarter 2022. VFR spend was also up 40.3 per cent to a record \$4.1 billion and leisure spend (holiday and VFR together) was up 59.1 per cent to \$18.6 billion.

Queensland reached records of both intrastate (\$14.1 billion up 38.4 per cent compared to 2019) and interstate (\$13.6 billion, up 47.8 per cent) OVE. In both cases, OVE growth was largely driven by increases in spend per night. Intrastate spend per night was up 42.1 per cent to \$249 and interstate spend per night was up 35.1 per cent to \$279 compared to 2019. Interstate visitation was in line with 2019 (down 0.6 per cent) at 8.1 million and intrastate visitation was slightly below 2019 levels (1.6 per cent lower at 17.5 million).

Spend continues to grow in the quarter

Queensland outperformed the national average growth for both OVE (up 44.1 per cent) and visitation (down 4.4 per cent) in the December quarter of 2022 compared to the December quarter of 2019. This was due in near equal measures to both the intrastate and interstate markets. Intrastate OVE was up 40.9 per cent compared to 2019 and interstate OVE was up by 47.9 per cent. This was despite both intrastate (down 4.1 per cent) and interstate (down 5.3 per cent) visitation still not equal to 2019.

The growth in OVE in the quarter was predominantly due to holiday visitors, who spent an extra \$1.4 billion in the December quarter of 2022 comparing with the December quarter of 2019. Just over half (53 per cent) of this increase in holiday OVE is attributed to the extra spend in accommodation, followed by food and drink (26 per cent), organised tours and entertainment (9 per cent), petrol (6 per cent) and rental vehicles and taxis (4 per cent). Commercial accommodation Average Daily Rates (ADR) in Queensland were up 40 per cent in the December quarter of 2022 compared with the same period in 2019.

Records around the regions

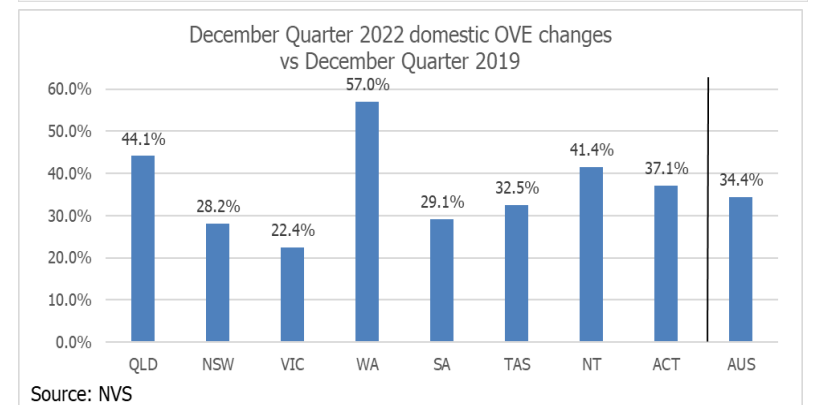
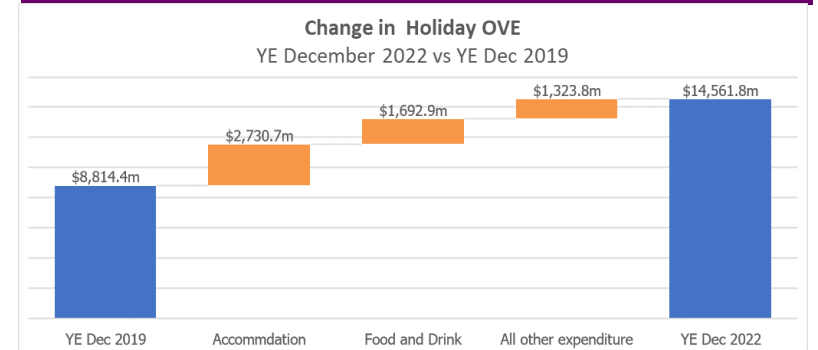
Most of Queensland's regions reached record levels of OVE in the year ending December 2022. Across the regions, the increase in spend was largely due to the increase in spend on accommodation. Three regions also welcomed more domestic visitors than ever before - Tropical North Queensland (2.5 million, up 13.9 per cent compared to 2019), Sunshine Coast (4.2 million visitors, up 4.1 per cent compared to 2019) and Southern Queensland Country (2.5 million, up 13.1 per cent compared to 2019).

December quarter 2022 overnight visitors in Queensland

	Visitors Dec QTR 2022	Visitors Dec QTR 2019	Change vs Dec QTR 2019
Total Queensland	6,455,000	6,756,000	-4.4%
Holiday	2,736,000	2,588,000	5.7%
VFR ⁴	2,121,000	2,454,000	-13.6%
Business	1,391,000	1,458,000	-4.6%
Overnight Visitor Expenditure	\$7,340.6m	\$5,093.6m	44.1%

December quarter 2022 Queensland interstate vs intrastate

	Visitors Dec QTR 2022	Visitors Dec QTR 2019	Change vs Dec QTR 2019
Visitation			
Interstate	2,045,000	2,158,000	-5.3%
Intrastate	4,411,000	4,598,000	-4.1%
Overnight Visitor Expenditure			
Interstate	\$3,485.0m	\$2,356.6m	47.9%
Intrastate	\$3,855.6m	\$2,737.0m	40.9%



Domestic Tourism Snapshot

Year ending December 2022



Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	25,591,000	25.0%	-1.2%	11,032,000	23.3%	10.2%
Brisbane	7,384,000	39.7%	-9.7%	2,330,000	36.9%	-1.4%
Gold Coast	4,122,000	27.3%	-1.9%	2,211,000	18.6%	2.2%
Sunshine Coast	4,215,000	19.9%	4.1%	2,460,000	19.0%	11.3%
SQC ⁷	2,521,000	20.0%	13.1%	828,000	12.9%	35.7%
SGBR ⁸	2,269,000	7.7%	-2.1%	786,000	-12.8%	6.9%
Townsville	1,208,000	15.1%	-6.9%	481,000	17.2%	19.3%
TNQ ⁹	2,525,000	27.4%	13.9%	1,529,000	43.3%	33.0%

	Visitors ¹	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	820,000	2.6%	432,000	2.8%
Mackay	1,181,000	3.8%	245,000	6.1%
Outback	956,000	-6.7%	373,000	4.1%
Whitsundays	851,000	11.2%	600,000	16.6%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$27,768.8m	65.2%	42.8%	100%	\$1,085
Brisbane	\$6,496.6m	101.9%	22.3%	23%	\$880
Gold Coast	\$5,126.0m	81.5%	38.9%	18%	\$1,244
Sunshine Coast	\$4,264.5m	58.6%	55.3%	15%	\$1,012
SQC	\$1,138.4m	38.9%	42.5%	4%	\$452
SGBR	\$1,593.7m	26.9%	33.1%	6%	\$702
Townsville	\$1,025.9m	31.8%	29.9%	4%	\$849
TNQ	\$4,387.0m	60.0%	74.9%	16%	\$1,737

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$658.2m	22.1%	2%	\$802
Mackay	\$654.2m	10.2%	2%	\$554
Outback	\$780.7m	-0.2%	3%	\$817
Whitsundays	\$1,521.1m	45.2%	5%	\$1,788

December Quarter 2022 overnight visitors and nights, by region

	Visitors Dec QTR 2022	Visitors Dec QTR 2019	Change vs Dec QTR 2019	Nights Dec QTR 2022	Nights Dec QTR 2019	Change vs Dec QTR 2019
Total Queensland	6,455,000	6,756,000	-4.4%	24,752,000	26,282,000	-5.8%
Brisbane	1,794,000	2,236,000	-19.8%	5,133,000	6,444,000	-20.3%
Sunshine Coast	1,037,000	1,139,000	-9.0%	3,571,000	4,176,000	-14.5%
SQC	540,000	516,000	4.8%	1,703,000	1,343,000	26.8%
Gold Coast	1,243,000	1,088,000	14.2%	4,300,000	3,724,000	15.5%
SGBR	558,000	552,000	1.2%	2,161,000	2,031,000	6.4%
TNQ	649,000	573,000	13.3%	3,141,000	3,012,000	4.3%
Townsville	215,000	267,000	-19.5%	1,014,000	1,430,000	-29.1%

Brisbane

Domestic OVE grew by 22.3 per cent to a record \$6.5 billion compared to the year ending December 2019. This was because of spend per visitor increasing 35.5 per cent to \$880. Despite the record OVE, visitation to Brisbane was still down compared to 2019 (at 7.4 million, down 9.7 per cent). The holiday market is recovering quicker than other purposes (down 1.4 per cent to 2.3 million), followed by VFR (down 9.1 per cent to 3.0 million). Business visitation continues to be significantly down compared to 2019 (down 21.9 per cent to 1.6 million). By market, intrastate visitation was closer to pre-COVID-19 levels (4.3 million, down 6.6 per cent). Among intrastate markets, Gold Coast was the best performing, with visitation 8.7 per cent higher than the pre-COVID-19 period at 594,000. Interstate visitation was also down, decreasing 13.6 per cent to 3.1 million compared to 2019. The decrease largely reflects visitation from New South Wales being down 15.2 per cent to 1.7 million compared to 2019. On other hand, Brisbane welcomed a record 878,000 Victorian visitors (steady, up 0.6 per cent) compared to 2019.

In the December quarter of 2022, nights (down 20.3 per cent) and visitation (down 19.8 per cent) were both down compared to the December quarter 2019.

Fraser Coast

Annual OVE reached a record \$658.2 million in the year ending December 2022, which was up 22.1 per cent over the past three years. This was due to higher spend per visitor and growth in visitors. Spend per visitor grew 16.1 per cent to \$802 over the past three years. Total visitation grew by 2.6 per cent to a record 820,000 over the same period. Both holiday (up 2.8 per cent over the past three years to 432,000) and VFR visitation (up 4.5 per cent over the past three years to 273,000) grew. Intrastate visitation also grew, up by 2.8 per cent to 626,000 over the same period. Fraser Coast welcomed a record 194,000 interstate visitors, but the trend in interstate visitation growth was not publishable due to a small visitor survey sample size in previous periods.

Gold Coast

Domestic OVE for the year ending December 2022 reached a record \$5.1 billion, which was up 38.9 per cent compared with the year ending December 2019. This growth was the result of a 41.6 per cent increase in spend per visitor to \$1,244.

Visitation is approaching 2019 levels at 4.1 million (down 1.9 per cent). Holiday visitation was 2.2 per cent higher than pre-COVID-19 levels (at 2.2 million), as was business visitation (up 10.5 per cent to 553,000). However, VFR (1.2 million, down 11.0 per cent) remains significantly below 2019 levels. The Gold Coast welcomed a record 2.3 million interstate visitors (up 4.0 per cent compared to 2019). This was a result of the combination of record visitation from both New South Wales (1.3 million, up 2.1 per cent) and Victoria (707,000, up 10.8 per cent). On the other hand, intrastate visitation was down 8.2 per cent at 1.9 million compared to 2019. Brisbane was the Gold Coast's largest intrastate source market with 1.3 million visitors, down 3.7 per cent.

Visitation in the December quarter was up 14.2 per cent and nights were up 15.5 per cent. Both intrastate (up 22.5 per cent) and interstate (up 6.7 per cent) visitation was up compared to 2019.

Mackay

Annual OVE reached a record \$654.2 million in Mackay, which was up 10.2 per cent over the past three years. This was driven by growth in both an increase in visitation (up 3.8 per cent on average over the past three years to 1.2 million) and spend per visitor (up 5.3 per cent to \$554 over the past three years). Both holiday (up 6.1 per cent on average over the past three years to 245,000) and business (up 5.3 per cent on average over the past three years to 676,000) travel have grown. On the other hand, VFR visitation has decreased 3.3 per cent to 191,000 over the same period. The region's visitation is predominantly from the intrastate market (93 per cent of trips), which grew by 5.9 per cent on average over the past three years to 1.1 million.

Outback Queensland

There were a record 373,000 holiday visitors to the region (up 4.1 per cent on average over the past three years), while VFR visitation was up by 4.7 per cent on average to 191,000. Before COVID-19 business visitation accounted for more than half of visitors to Outback Queensland. Business visitation was down 18.6 per cent on average to 340,000 in the three years to December 2022. As a result, total visitation was down 6.7 per cent on average to 956,000 visitors. Total OVE was steady (-0.2 per cent on average) at \$780.7 million over the past three years. Other visitation purposes have grown on average over the past three years. Intrastate visitation was down 7.7 per cent on average to 738,000. There were 218,000 interstate visitors, but the trend growth rate was not reportable due to small sample size in previous years.

Southern Great Barrier Reef (SGBR)

Domestic OVE grew by 33.1 per cent to a record \$1.6 billion compared to the year ending December 2019. This occurred because the average spend per visitor increased 35.9 per cent to \$702. On the other hand, visitation remains 2.1 per cent lower than in 2019 at 2.3 million. This decline in visitation compared to 2019 was due to business (down 13.9 per cent to 645,000) and VFR visitation (down 2.9 per cent to 673,000). Holiday visitation grew 6.9 per cent to 786,000 compared to 2019. By market, intrastate visitation was down 1.9 per cent compared to 2019 at 2.0 million and interstate visitation was down 3.4 per cent compared to 2019 at 285,000.

Visitation in the December quarter of 2022 was up 1.2 per cent compared to the December quarter of 2019. Intrastate visitation was up 1.6 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	17,505,000	3.8%	-1.6%
Brisbane	4,282,000	7.1%	-6.6%
Gold Coast	1,860,000	-14.4%	-8.2%
Sunshine Coast	3,016,000	2.8%	2.9%
SQC	2,065,000	11.0%	15.1%
SGBR	1,984,000	3.0%	-1.9%
Townsville	923,000	0.7%	-13.3%
TNQ	1,529,000	0.4%	1.9%

	Visitors	3-yr trend
Fraser Coast	626,000	2.8%
Mackay	1,095,000	5.9%
Outback	738,000	-7.7%
Whitsundays	510,000	7.2%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	8,085,000	123.9%	-0.6%
Brisbane	3,102,000	141.1%	-13.6%
Gold Coast	2,262,000	112.3%	4.0%
Sunshine Coast	1,199,000	106.8%	7.4%
SQC	456,000	89.4%	4.7%
SGBR	285,000	58.4%	-3.4%
Townsville	285,000	114.2%	22.7%
TNQ	996,000	116.8%	39.0%

	Visitors	3-yr trend
Fraser Coast	194,000	np
Mackay	np	np
Outback	218,000	np
Whitsundays	341,000	np



WARWICK SOUTHERN QUEENSLAND COUNTRY

Domestic Tourism Snapshot

Year ending December 2022



Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	25,591,000	25.0%	-1.2%	11,032,000	23.3%	10.2%
Brisbane	7,384,000	39.7%	-9.7%	2,330,000	36.9%	-1.4%
Gold Coast	4,122,000	27.3%	-1.9%	2,211,000	18.6%	2.2%
Sunshine Coast	4,215,000	19.9%	4.1%	2,460,000	19.0%	11.3%
SQC ⁷	2,521,000	20.0%	13.1%	828,000	12.9%	35.7%
SGBR ⁸	2,269,000	7.7%	-2.1%	786,000	-12.8%	6.9%
Townsville	1,208,000	15.1%	-6.9%	481,000	17.2%	19.3%
TNQ ⁹	2,525,000	27.4%	13.9%	1,529,000	43.3%	33.0%

	Visitors ¹⁰	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	820,000	2.6%	432,000	2.8%
Mackay	1,181,000	3.8%	245,000	6.1%
Outback	956,000	-6.7%	373,000	4.1%
Whitsundays	851,000	11.2%	600,000	16.6%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$27,768.8m	65.2%	42.8%	100%	\$1,085
Brisbane	\$6,496.6m	101.9%	22.3%	23%	\$880
Gold Coast	\$5,126.0m	81.5%	38.9%	18%	\$1,244
Sunshine Coast	\$4,264.5m	58.6%	55.3%	15%	\$1,012
SQC	\$1,138.4m	38.9%	42.5%	4%	\$452
SGBR	\$1,593.7m	26.9%	33.1%	6%	\$702
Townsville	\$1,025.9m	31.8%	29.9%	4%	\$849
TNQ	\$4,387.0m	60.0%	74.9%	16%	\$1,737

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$658.2m	22.1%	2%	\$802
Mackay	\$654.2m	10.2%	2%	\$554
Outback	\$780.7m	-0.2%	3%	\$817
Whitsundays	\$1,521.1m	45.2%	5%	\$1,788

December Quarter 2022 overnight visitors and nights, by region

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Total Queensland	6,455,000	6,756,000	-4.4%	24,752,000	26,282,000	-5.8%
Brisbane	1,794,000	2,236,000	-19.8%	5,133,000	6,444,000	-20.3%
Sunshine Coast	1,037,000	1,139,000	-9.0%	3,571,000	4,176,000	-14.5%
SQC	540,000	516,000	4.8%	1,703,000	1,343,000	26.8%
Gold Coast	1,243,000	1,088,000	14.2%	4,300,000	3,724,000	15.5%
SGBR	558,000	552,000	1.2%	2,161,000	2,031,000	6.4%
TNQ	649,000	573,000	13.3%	3,141,000	3,012,000	4.3%
Townsville	215,000	267,000	-19.5%	1,014,000	1,430,000	-29.1%

Southern Queensland Country (SQC)

Domestic OVE grew by 42.5 per cent compared to 2019 to a record \$1.1 billion. This was because spend per night grew 26.2 per cent to \$171, as well as record visitation and nights. Total nights grew by 12.9 per cent to 6.7 million and total visitors grew 13.1 per cent to 2.5 million. Both holiday (up 35.7 per cent to 828,000) and VFR (up 5.8 per cent to 994,000) visitation have grown compared to 2019. Business visitation was in line with 2019 (down 0.6 per cent) at 531,000. By source market, interstate visitation reached a new record of 456,000 (up 4.7 per cent). Intrastate visitation was up 15.1 per cent compared to 2019 at 2.1 million.

Visitation in the December quarter of 2022 was up 4.8 per cent and nights were up 26.8 per cent compared to the December quarter of 2019. Intrastate visitation was up 10.0 per cent compared to the December quarter of 2019, while intrastate nights were up 20.4 per cent. Interstate visitation results were not publishable on the quarterly basis.

Sunshine Coast

Sunshine Coast's domestic OVE grew 55.3 per cent to a record \$4.3 billion compared with the year ending December 2019. This was due to record levels of visitation (4.2 million, up 4.1 per cent compared to 2019) along with spend per visitor increasing 49.2 per cent to \$1,012. Holiday visitation drove the region's growth, reaching a record 2.5 million trips (up 11.3 per cent). VFR visitation was steady (down 0.5 per cent) compared to 2019 at 1.4 million, but business visitation remains down 35.6 per cent at 232,000. Interstate visitation reached a record 1.2 million. This included a record 592,000 visitors from New South Wales (up 4.1 per cent compared to 2019) and a record 439,000 visitors from Victoria (up 11.7 per cent compared to 2019). Intrastate visitation was up by 2.9 per cent compared to 2019 at 3.0 million. Visitation from Sunshine Coast's largest source market, Brisbane, was up 15.8 per cent compared to 2019 at 2.0 million.

In the December quarter of 2022 visitation was down 9.0 per cent compared to the December quarter 2019 and nights were down 14.5 per cent at 3.6 million. Intrastate visitation was steady (down 0.8 per cent) compared to 2019 and interstate visitation was 29.1 per cent lower.

Whitsundays

Annual OVE grew by 45.2 per cent on average over the past three years to \$1.5 billion. This was primarily due to spend per visitor increasing (up 28.1 per cent on average to \$1,788). Visitation was up 11.2 per cent on average to 851,000 over the past three years. The increase in spend was mostly on accommodation, food and drink. Holiday visitation accounts for 71 per cent of domestic visitors to the region and this grew by 16.6 per cent on average over the past three years to 600,000. However, it is noteworthy that holiday visitors stayed a record 3.4 million nights (up 28.7 per cent on average over the past three years). The Whitsundays welcomed a record 341,000 interstate visitors, although the three year trend growth rate is unpublished due to small sample sizes in previous years. There were 510,000 intrastate visitors which is up 7.2 per cent on average over the past three years.

Townsville

Domestic OVE grew by 29.9 per cent to a record \$1.0 billion compared to the pre-COVID-19 year ending December 2019. This was the result of a record number of nights (4.9 million, up 2.2 per cent compared to 2019) and an increase in spend per night. The average spend per night increased 27.1 per cent to \$210 per night. Visitors' average length of stay grew 0.4 nights since 2019 to 4.0 nights. This masked the fact that total visitation was down 6.9 per cent to 1.2 million compared to 2019. The decrease in the total visitation was due to VFR (down 17.6 per cent to 327,000) and business (down 16.8 per cent to 313,000) visitation both decreasing. Holiday visitation was 19.3 per cent higher at 481,000 compared to 2019. Intrastate visitation was down 13.3 per cent at 923,000. On the other hand, interstate visitation was up 22.7 per cent to 285,000 compared to 2019. This included a record 147,000 interstate holiday visitors, which is 42.1 per cent more than in 2019.

In the December quarter of 2022, visitation to Townsville was down by 19.5 per cent compared to the December quarter 2019 and nights were down 29.1 per cent. Intrastate visitation was down 27.6 per cent with the December quarter of 2019. Interstate visitation was not reportable due to small sample sizes.

Tropical North Queensland (TNQ)

Domestic OVE reached a record \$4.4 billion (up 74.9 per cent compared to 2019). This was on the back of an increase in spend per night (up 36.8 per cent to \$307) and a record number of both visitors and visitor nights. Total nights were up 27.9 per cent to 14.3 million compared to 2019 and total visitation was up 13.9 per cent to 2.5 million.

Holidays account for 61 per cent of visitors and this market was responsible for the domestic growth in the region. Tropical North Queensland welcomed a record 1.5 million holiday visitors (up 33.0 per cent vs. 2019). Holiday visitors stayed a record 9.0 million nights (up 46.0 per cent). Conversely, VFR visitation was down 8.1 per cent to 496,000 compared with 2019 and business visitation decreased 11.6 per cent to 418,000. By source market, TNQ welcomed a record number of interstate visitors (996,000 visitors, up 39.0 per cent). This included a record number of visitors from both New South Wales (up 29.1 per cent to 372,000) and Victoria (up 40.8 per cent to 454,000). Intrastate visitation grew by 1.9 per cent to 1.5 million.

In the December quarter of 2022, visitation was up by 13.3 per cent and nights were up by 4.3 per cent compared to the December quarter of 2019. The growth in visitation came from the interstate market. Interstate visitation was up by 46.8 per cent. Intrastate visitation was in line (down 0.3 per cent) with the December quarter 2019.

Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	17,505,000	3.8%	-1.6%
Brisbane	4,282,000	7.1%	-6.6%
Gold Coast	1,860,000	-14.4%	-8.2%
Sunshine Coast	3,016,000	2.8%	2.9%
SQC	2,065,000	11.0%	15.1%
SGBR	1,984,000	3.0%	-1.9%
Townsville	923,000	0.7%	-13.3%
TNQ	1,529,000	0.4%	1.9%

	Visitors	3-yr trend
Fraser Coast	626,000	2.8%
Mackay	1,095,000	5.9%
Outback	738,000	-7.7%
Whitsundays	510,000	7.2%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	8,085,000	123.9%	-0.6%
Brisbane	3,102,000	141.1%	-13.6%
Gold Coast	2,262,000	112.3%	4.0%
Sunshine Coast	1,199,000	106.8%	7.4%
SQC	456,000	89.4%	4.7%
SGBR	285,000	58.4%	-3.4%
Townsville	285,000	114.2%	22.7%
TNQ	996,000	116.8%	39.0%

	Visitors	3-yr trend
Fraser Coast	194,000	np
Mackay	np	np
Outback	218,000	np
Whitsundays	341,000	np



SURFERS PARADISE, GOLD COAST

Domestic Tourism Snapshot

Year ending December 2022



State expenditure comparison

	Expenditure	Annual change	Change vs YE Dec 2019	Share of expenditure	Spend per visitor
Total Australia	\$101,258.4m	66.7%	25.5%	100%	\$936
Queensland	\$27,768.8m	65.2%	42.8%	27%	\$1,085
New South Wales	\$28,437.8m	81.1%	20.1%	28%	\$810
Victoria	\$20,277.5m	102.6%	19.4%	20%	\$775
Other States	\$24,771.6m	36.0%	20.2%	24%	\$995

State visitation comparison

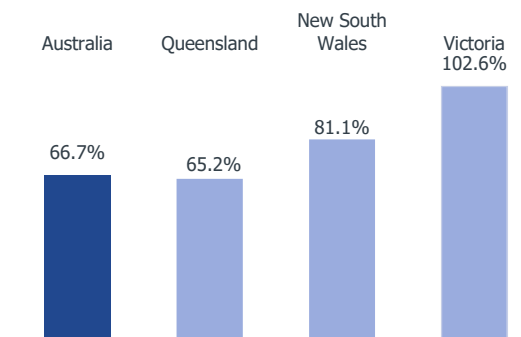
	Visitors	Annual Change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Australia	108,212,000	31.8%	-7.9%	3.7	-0.2
Queensland	25,591,000	25.0%	-1.2%	4.1	0.1
New South Wales	35,118,000	44.2%	-9.9%	3.2	-0.3
Victoria	26,168,000	45.8%	-12.0%	3.0	-0.2
Other States	24,894,000	16.9%	-7.0%	4.2	-0.3

Total holiday	47,647,000	29.0%	3.1%	3.9	-0.1
Queensland	11,032,000	23.3%	10.2%	4.6	0.1
New South Wales	15,123,000	46.5%	2.2%	3.4	-0.2
Victoria	12,587,000	47.9%	1.1%	3.0	-0.3
Other States	10,651,000	7.6%	0.9%	4.3	0.0

Total VFR	35,522,000	31.2%	-11.1%	3.3	-0.1
Queensland	8,373,000	26.2%	-6.4%	3.7	0.3
New South Wales	12,064,000	38.9%	-14.2%	3.1	-0.3
Victoria	8,639,000	35.5%	-16.0%	2.8	-0.2
Other States	7,088,000	23.5%	-3.5%	3.5	-0.3

Total Business	21,427,000	48.2%	-20.8%	3.6	-0.5
Queensland	5,217,000	34.6%	-14.9%	3.7	-0.2
New South Wales	6,408,000	57.0%	-23.1%	2.9	-0.5
Victoria	4,125,000	88.8%	-29.0%	2.8	0.0
Other States	6,133,000	30.6%	-18.6%	4.6	-0.8

Annual change in visitor expenditure by state Year ending December 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.

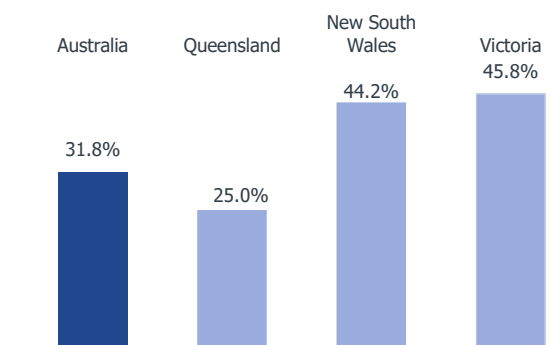
For this publication, data has been adjusted to conform to Tourism and Events Queensland's (TEQ) tourism region definitions.

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 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.

Annual change in visitation by state, Year ending December 2022



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