

Minister for Tourism and Sport

BRIEFING NOTE

SUBJECT: National and International Visitor Surveys for the year ending September 2023

RECOMMENDATION(S):

That you:

- **note** Tourism Research Australia (TRA) is expected to release its National Visitor Survey (NVS) and International Visitor Survey (IVS) results for the year ending September 2023, at **12:01am AEDT on Wednesday 20 December 2023**. The data is under strict embargo until this time; and
- **note** the key results summarised here:
 - o Queensland reached a record combined \$34.3 billion in total Overnight Visitor Expenditure (OVE) which includes \$29.1 billion in domestic OVE and \$5.2 billion in international OVE;
 - o Queensland was ranked second in total domestic OVE market share (26.8 per cent share of all domestic overnight spend in Australia, down 1.2 percentage points year on year). New South Wales (NSW) was ranked first in domestic OVE market share at 27.5 per cent (down 0.2 percentage points);
 - o Queensland's Domestic Holiday OVE was \$16.1 billion, up 12.3 per cent year on year. Queensland now holds 30.1 per cent market share of domestic holiday OVE (up 0.1 percentage points year on year), maintaining the position of holding the largest share of domestic holiday OVE;
 - o Economic headwinds continue to be noticeable in the most recent quarters which reflect on the impact of the rising cost of living and the slowdown of the economy in Australia;
 - o Queensland's total OVE was 2.5 per cent ahead of its Towards Tourism 2032 (TT32) target for year ending 2032 (\$34.3 billion vs \$33.5 billion). International OVE is 15.8 per cent ahead of its target (\$5.2 billion vs \$4.5 billion) and intrastate OVE is 3.9 per cent ahead of its target (\$15.2 billion vs \$14.6 billion). However, interstate OVE is 3.1 per cent below its target (\$13.9 billion vs \$14.3 billion).

Minister's Comments:

☐ **NOTED**

☐ **FURTHER INFORMATION REQUIRED**

Hon. Michael Healy MP
Minister for Tourism and Sport

Date:

☐ **ENDORSED**

Kate Adams
Chief of Staff

Date:

BACKGROUND:

1. TRA will release the NVS and IVS results for the year ending September 2023 at 12:01am AEDT on 20 December 2023.
2. Usually, the IVS produces international visitation estimates using a combination of airport interviews, immigration data taken from visa applications/passports, previous travel records and sampled incoming passenger cards. TRA imputed IVS estimates from the September quarter 2020 to June quarter 2022 due to COVID-19 related international border closures and insufficient sample size of interviews. The IVS estimates for September quarter 2022 and December quarter 2022 were based on a combination of interview data and imputation.

Author:	Endorsed by:	Endorsed by:
Position: Research Specialist	Position: Corporate Affairs Director	Position: Group Exec Corporate and Industry
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Date: 13/12/2023	Date: 12/12/2023	Date: 14/12/2023

3. The IVS estimates for the March to September quarter 2023 are based on 100 per cent interview data. As a result, the year ending September 2023 IVS results are based on a combination of imputation and interview data.
4. TRA recommends reporting international data by purpose only at the national level, while stopover by state and market can be released at the state level for periods using imputed data including the year ending September 2023. The year ending September 2023 data includes three months of imputed data, i.e. October – December 2022, and nine months' results based on survey results i.e. January – September 2023. The results for January – September 2023 can be reported by purpose at the state level and visitation at the regional level when sample sizes meet the publishable levels.
5. An overview is provided in **Attachments 1, 2 and 3**.

KEY ISSUES:

6. Queensland has the second highest total (domestic plus international) OVE in the nation behind NSW, with Queensland reaching a record \$34.3 billion OVE. This includes \$29.1 billion in domestic OVE and \$5.2 billion in international OVE.

DOMESTIC OVERNIGHT VISITOR EXPENDITURE

7. Queensland's total domestic OVE reached \$29.1 billion, up 18.5 per cent year on year.
8. Queensland continues to hold its number two position in total domestic OVE market share, holding 26.8 per cent of domestic OVE in Australia (down 1.2ppt vs. year ending September 2022).
9. Queensland retained its position as the leading state for holiday OVE, achieving \$16.1 billion, up 12.3 per cent year on year. Queensland maintains the leading position in the holiday market, holding 30.1 per cent of holiday OVE (up 0.1ppt over the year).
10. The strong return of business travel has continued in Queensland. OVE generated from business travel reached a record \$4.9 billion, up 44.6 per cent year on year. This is the fourth consecutive business OVE record for Queensland. Five of the eight other states and territories also reached business OVE records.
11. Queensland also reached a record of \$15.2 billion in intrastate OVE, up 9.7 per cent year on year.
12. Australians' outbound travel continues its upward trajectory. In the wake of rising cost of living, it seems that consumers might have opted for an overseas trip rather than an interstate trip, while at the same time, they continue to take intrastate trips within their own states.
13. Queensland benefited from the removal of domestic travel restrictions following the pandemic, with holiday OVE growth in the September quarter 2022 (July-September 2022) reaching over 140 per cent year on year. However, consistently high inflation in the last 18 months and its flow on effect, and the high cost of living, has resulted in growth tapering off. OVE has remained stable year on year in the September quarter 2023 following a decrease in the June 2023 quarter.
14. It is becoming prominent that while consumers are still travelling, they are cutting back on their spending when on holiday. In the September 2023 quarter when school holidays occurred, the effects of increases in visitation and inflation were offset by shorter trips and less money being spent on accommodation and food and drink. This aligned with TEQ's quarterly holiday intentions research which suggests that people still intended to travel but would downsize their trips and cut back on their discretionary spend. Further softer numbers are expected in the coming quarterly annual releases.
15. Three regions reached record levels of OVE. They were Brisbane (\$7.2 billion, up 35.0 per cent year on year), Gold Coast (\$5.8 billion, up 38.4 per cent year on year) and Mackay (\$799.5 million, up 25.4 per cent over the three-year trend).
16. Gold Coast also reached a new visitation record of 4.4 million (up 18.8 per cent year on year). This included a record number of holiday visitors (2.4 million, up 15.3 per cent). Sunshine Coast also reached a record number of holiday visitors (2.5 million up 1.7 per cent).

INTERNATIONAL OVERNIGHT VISITOR EXPENDITURE

17. In the year ending September 2023, total international OVE to Queensland was \$5.2 billion, down by 13.9 per cent (or \$847.8 million) compared to pre-COVID (i.e. year ending December 2019).

18. Queensland slightly outperformed the national average in OVE recovery (OVE at the national level was down by 18.4 per cent).
19. Total international visitation to Queensland was 1.8 million visitors, down by 35.9 per cent (or 998,000) compared to pre-COVID. International visitation recovery to Queensland was behind most states but was ahead of Victoria (down 40.9 per cent), the Australian Capital Territory (down 37.1 per cent), and Northern Territory (down 39.6 per cent).
20. The top five source markets by visitation to Queensland in the year ending September 2023 were mostly similar to Australia with the exception of Japan being one of the top five markets for Queensland, and China being one of the top five markets for Australia. Queensland's top five markets were New Zealand (413,000 or 23 per cent of total international visitation to Queensland), the United Kingdom (191,000 or 11 per cent), the USA (162,000 or 9 per cent), Japan (100,000, or 6 per cent) and India (69,000, or 4 per cent).
21. OVE generated from visiting friends and relatives (VFR), employment and business travel was way ahead of what it was in the September quarter 2019, and employment and business outperformed the national average. However, from the holiday travel perspective, Queensland was behind the national average in both holiday visitation and holiday OVE recovery.
22. Korea and Canada stand out as international markets where visitation in the September 2023 quarter was higher than September quarter 2019. The increase in visitation corresponds with an increase in aviation capacity from both countries into Brisbane.
23. Regional International visitation can be analysed for nine months now that survey data is available This data covers the period January – September 2023.
24. When it comes to regional performance, Brisbane had the largest share of the Queensland's international visitors in the first nine months of 2023 (812,000, 76.8 per cent of visitor numbers in the first nine months of 2019), followed by Gold Coast (436,000 visitors, 56.1 per cent of what it was in the first nine months of 2019) and Tropical North Queensland (313,000 visitors, 54.2 per cent of what it was in the first nine months of 2019).

COMPARISON WITH TT32

25. Queensland's total OVE 2.5 per cent ahead of its TT32 target for year ending 2032 (\$34.3 billion vs \$33.5 billion). International OVE is 15.8 per cent ahead of its target (\$5.2 billion vs \$4.5 billion) and intrastate OVE is 3.9 per cent ahead of its target (\$15.2 billion vs \$14.6 billion). However, interstate OVE is 3.1 per cent below its target (\$13.9 billion vs \$14.3 billion).

ELECTION COMMITMENT(S):

26. The Queensland Government's Rebuilding Queensland Tourism election commitment is focussed on fast-tracking tourism recovery and restoring tourism jobs in Queensland. The NVS and IVS results are an important dataset that helps TEQ to track Queensland's recovery.

CONSULTATION:

27. N/A.

RESOURCE IMPLICATIONS:

28. N/A.

COMMUNICATIONS STRATEGY:

29. TEQ will discuss any media opportunities with the Minister's Office.

ATTACHMENTS:

- Attachment 1 – NVS Executive Summary
- Attachment 2 – IVS Executive Summary
- Attachment 3 – Domestic Snapshot Draft
- Attachment 4 – International Snapshot Draft
- Attachment 5 – 10-Year View - Queensland visitation and expenditure
- Attachment 6 – Queensland OVE vs TT32 Targets.

Executive Summary – International Visitor Survey

Year ending September 2023

Under strict embargo until 12:01 am (AEDT), Wednesday 20th December 2023

Methodology update due to COVID-19 border closures:

- Usually, the IVS produces international visitation estimates using a combination of airport interviews, immigration data taken from visa applications/passports, previous travel records and sampled incoming passenger cards.
- Tourism Research Australia imputed IVS estimates from the March quarter 2020 to June quarter 2022. This was due to COVID-19 related international border closures and insufficient sample size of interviews. The IVS estimates for September quarter 2022 and December quarter 2022 were based on a combination of interview data and imputation.
- The IVS estimates for the March, June and September quarters 2023 are based on 100% interview data. As a result, the year ending September 2023 IVS results are based on a combination of imputation and interview data.
- Given some data is imputed, TRA recommends reporting data by purpose only at the national level, while stopover by market can be released at the state level for periods using imputed data including the year ending September 2023. The year ending September 2023 data includes three months of imputed data, i.e. October – December 2022, and nine months' results based on survey results i.e. January – September 2023. The results for January – September 2023 can be reported by purpose at the state level and visitation at the regional level when sample sizes meet the publishable levels.**
- Please see [International Visitor Survey \(IVS\) methodology | Tourism Research Australia](#) for more information.

Queensland and Australia – Year ending September 2023

Year-ended overnight visitor expenditure and overnight visitor trips

	Total \$m	Annual % change	3yr trend	Change since 2019	Total visitors	Annual % change	3yr trend	Change since 2019
Queensland	\$5,234.8m	286.4%	50.0%	-13.9%	1,785,000	243.5%	28.0%	-35.9%
New South Wales	\$10,226.9m	184.3%	56.5%	-10.1%	3,114,000	229.1%	33.7%	-29.0%
Victoria	\$5,648.5m	126.3%	17.4%	-36.0%	1,856,000	198.5%	16.5%	-40.9%
Western Australia	\$2,200.4m	262.0%	60.1%	-7.7%	740,000	240.1%	29.9%	-25.7%
South Australia	\$1,218.0m	296.9%	61.9%	1.0%	407,000	328.1%	39.7%	-16.5%
ACT	\$416.8m	np	np	-26.3%	170,000	225.7%	33.1%	-37.1%
Northern Territory	\$395.2m	268.0%	52.7%	-9.5%	180,000	310.5%	20.8%	-39.6%
Tasmania	\$314.7m	246.2%	0.1%	-43.3%	185,000	415.1%	12.7%	-34.6%
Australia	\$25,655.8m	193.0%	43.2%	-18.4%	6,111,000	197.9%	31.0%	-29.8%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Year ending September 2023 visitation to Australia, by purpose

	Australia			
	Visitors	Annual % change	3yr trend	Change since 2019
Holiday	2,762,000	333.6%	19.6%	-41.2%
VFR	2,859,000	157.9%	39.3%	-15.5%
Business	716,000	183.0%	38.5%	-32.0%
Employment	227,000	150.5%	56.1%	10.0%
Education	416,000	165.1%	28.8%	-36.2%
Other reason	720,000	280.7%	45.0%	-6.0%
Total purpose	6,111,000	197.9%	31.0%	-29.8%

*Change vs 2019 refers to Year Ending December 2019

- In the year ending September 2023, total international overnight visitor expenditure (OVE) to Queensland was **\$5.2 billion**, down by 13.9 per cent (or \$847.8 million) compared to pre-COVID (i.e. year ending December 2019). Queensland slightly outperformed the national average in OVE recovery (OVE at the national level OVE was down by 18.4 per cent).
- Total international visitation to Queensland** was 1.8 million visitors, down by 35.9 per cent (or 998,000) compared to pre-COVID. International visitation recovery to Queensland was **behind** most states, but was ahead of Victoria (down 40.9 per cent, ACT (down 37.1 per cent), and Northern Territory (down 39.6 per cent).

Executive Summary – International Visitor Survey

Year ending September 2023

Under strict embargo until 12:01 am (AEDT), Wednesday 20th December 2023

- As expected, other than visitors for employment purposes, the VFR market was next to bounce back quickly after COVID. In the year ending September 2023, there were 2.9 million VFR visitors to Australia, 84.5 per cent of what it was pre-COVID, followed by 716,000 business travellers, 68 per cent of pre-COVID levels, 416,000 education visitors, 63.8 per cent of pre-COVID levels. Holiday visitation is the slowest segment to recover with the recovery rate of 58.8 per cent of what it was pre-COVID.

Year ending September 2023 top 20 visitation by source market

	Queensland		Australia	
	Total Visitors	Change since 2019	Total visitors	Change since 2019
NZ	413,000	-15.6%	1,076,000	-17.2%
UK	191,000	-12.5%	553,000	-17.6%
USA	162,000	-31.3%	576,000	-24.9%
Japan	100,000	-54.5%	223,000	-51.2%
India	69,000	-16.3%	365,000	-3.1%
China	62,000	-87.5%	387,000	-70.8%
Canada	59,000	-11.0%	138,000	-22.5%
Germany	58,000	-28.4%	135,000	-31.8%
Korea	56,000	-24.3%	210,000	-17.3%
Singapore	41,000	-41.4%	312,000	-25.1%
France	32,000	-34.0%	99,000	-27.2%
Scandinavia	30,000	-26.4%	73,000	-29.2%
Thailand	29,000	53.1%	89,000	-5.9%
Indonesia	29,000	0.2%	169,000	-14.4%
Malaysia	25,000	-45.2%	152,000	-55.7%
Hong Kong	24,000	-63.9%	142,000	-50.0%
Taiwan	21,000	-73.4%	93,000	-47.5%
Netherlands	20,000	-21.5%	46,000	-25.8%
Italy	18,000	-31.1%	56,000	-22.3%
Switzerland	14,000	-8.9%	35,000	-30.3%
Other Asia	79,000	15.9%	465,000	7.0%
Other Europe	68,000	-27.9%	220,000	-16.4%
Other Countries	183,000	-3.1%	495,000	-8.8%
Total	1,785,000	-35.9%	6,111,000	-29.8%

Source: IVS

Note: Yellow highlights indicates a record

- Over the year, the top five source markets by **visitation to Australia** were **New Zealand** (1.1 million), **the USA** (576,000), **the United Kingdom** (553,000), **China** (387,000) and **India** (365,000).
- The top five source markets by **visitation to Queensland** in the year ending September 2023 were mostly similar to Australia with the exception of **Japan** being one of the top five markets for Queensland, and China being one of the top five markets for Australia. Queensland's top five markets were **New Zealand** (413,000 or 23 per cent of total international visitation to Queensland), **the United Kingdom** (191,000 or 11 per cent), **the USA** (162,000 or 9 per cent), **Japan** (100,000, or 6 per cent) and **India** (69,000, or 4 per cent).
- It is interesting to note that Queensland welcomed a record 29,000 visitors from **Thailand** and **Indonesia** respectively in the year ending September 2023. Visitation from Thailand was up 53.1 per cent compared to pre-COVID and visitation from Indonesia was steady (up 0.2 per cent) compared to 2019. More than half of the visitors from Thailand were visiting friends and relatives and a third were on holidays. On the contrary, almost two thirds visitors from Indonesia were on holidays and a third were visiting friends and relatives.

Executive Summary – International Visitor Survey

Year ending September 2023

Under strict embargo until 12:01 am (AEDT), Wednesday 20th December 2023

Thai Visitation to Queensland Year ending September 2023			Indonesian Visitation to Queensland Year ending September 2023		
	Visitors	Change vs 2019		Visitors	Change vs 2019
Holiday	10,000	np	Holiday	18,000	4.1%
VFR	16,000	78.4%	VFR	9,000	np
Education	3,000	np	Education	np	np
Other	np	np	Other	4,000	-19.4%
Total	29,000	53.1%	Total	29,000	0.2%

Source: IVS

Source: IVS

- There was also **record visitation from 'Other Asia'**, the combination of Asian countries not individually reported in the IVS, **for both Australia overall and Queensland**.
- Among **the top 20 source markets**, Queensland slightly outperformed the national average recovery in **New Zealand, the United Kingdom, Canada, Germany, Scandinavia, Thailand, Indonesia, Malaysia, Netherlands and Switzerland** compared to 2019.

Queensland and Australia – September Quarter 2023

Quarterly overnight visitor expenditure by state

	Holiday			Total		
	Sep 2023	Sep 2019	Change since 2019	Sep 2023	Sep 2019	Change since 2019
Queensland	\$629.6m	\$740.0m	-14.9%	\$1,591.0m	\$1,600.9m	-0.6%
New South Wales	\$821.9m	\$782.9m	5.0%	\$3,297.8m	\$2,890.9m	14.1%
Victoria	\$373.4m	\$485.4m	-23.1%	\$1,798.1m	\$2,271.4m	-20.8%
Western Australia	\$157.7m	\$223.7m	-29.5%	\$493.9m	\$652.3m	-24.3%
South Australia	\$64.5m	\$50.4m	28.0%	\$371.2m	\$287.1m	29.3%
ACT	\$8.2m	\$13.0m	-36.6%	\$113.0m	\$133.3m	-15.3%
Tasmania	\$43.2m	\$35.8m	20.7%	\$65.0m	\$84.4m	-23.0%
Northern Territory	\$83.4m	\$106.8m	-21.9%	\$110.2m	\$135.9m	-18.9%
Total	\$2,182.0m	\$2,438.0m	-10.5%	\$7,840.1m	\$8,056.4m	-2.7%

Quarterly Visitation by State

	Holiday			Total		
	Sep 2023	Sep 2019	Change since 2019	Sep 2023	Sep 2019	Change since 2019
Queensland	290,000	461,000	-37.1%	518,000	710,000	-27.0%
New South Wales	388,000	526,000	-26.3%	844,000	984,000	-14.2%
Victoria	231,000	346,000	-33.4%	477,000	696,000	-31.4%
Western Australia	79,000	128,000	-38.3%	171,000	233,000	-26.6%
South Australia	44,000	43,000	1.2%	105,000	94,000	12.4%
ACT	14,000	26,000	-45.2%	35,000	61,000	-43.1%
Tasmania	23,000	30,000	-25.8%	37,000	40,000	-8.5%
Northern Territory	43,000	77,000	-44.3%	58,000	92,000	-37.2%
Total	781,000	1,079,000	-27.7%	1,656,000	2,064,000	-19.8%

Executive Summary – International Visitor Survey

Year ending September 2023

Under strict embargo until 12:01 am (AEDT), Wednesday 20th December 2023

- **In the September quarter 2023**, Queensland welcomed 518,000 international visitors, down 27.0 per cent compared to the September quarter 2019. Total international OVE in Queensland was \$1.6 billion, which was steady (down 0.6 per cent) compared to the September quarter 2019.
- In the September quarter 2023, Queensland welcomed 290,000 international holiday visitors, down by 37.1 per cent compared to the September quarter 2019. These holiday visitors generated \$629.6 million OVE in Queensland, down by 14.9 per cent compared to the September quarter 2019. Holiday visitors tended to stay longer with Average Length of Stay (ALoS) of 15.7 nights, up by 2.4 nights from 13.3 nights in the September quarter 2019. These holiday visitors spent on average \$2,168 per visitor, up 35.2 per cent compared with the September quarter 2019 with an average spend of \$138 per night (up 14.6 per cent compared to September 2019).
- In comparison with Australia, Queensland was slightly behind on visitation recovery for holiday, VFR and education, but was in line with national average in terms of OVE recovery. **OVE generated from VFR, employment and business travel was way ahead** of what it was in the September quarter 2019, and employment and business outperformed the national average. However, from **the holiday travel** perspective, Queensland was behind national average in both holiday visitation and holiday OVE recovery.

Quarterly overnight visitor expenditure by purpose

	Queensland			Australia		
	Sep 2023	Sep 2019	Change since 2019	Sep 2023	Sep 2019	Change since 2019
Holiday	\$629.6m	\$740.0m	-14.9%	\$2,182.0m	\$2,438.0m	-10.5%
VFR	\$244.3m	\$205.8m	18.7%	\$1,225.5m	\$1,012.3m	21.1%
Business	\$157.3m	\$89.0m	76.6%	\$555.5m	\$521.2m	6.6%
Employment	\$96.9m	\$69.0m	40.4%	\$472.2m	\$366.5m	28.8%
Education	\$423.3m	\$485.5m	-12.8%	\$3,305.3m	\$3,624.2m	-8.8%
Other	\$39.7m	\$11.6m	241.7%	\$99.7m	\$94.2m	5.8%
Total	\$1,591.0m	\$1,600.9m	-0.6%	\$7,840.1m	\$8,056.4m	-2.7%

Quarterly visitation by purpose

	Queensland			Australia		
	Sep 2023	Sep 2019	Change since 2019	Sep 2023	Sep 2019	Change since 2019
Holiday	290,000	461,000	-37.1%	781,000	1,079,000	-27.7%
VFR	174,000	194,000	-10.1%	682,000	749,000	-8.9%
Business	62,000	57,000	8.8%	206,000	275,000	-25.0%
Employment	13,000	12,000	9.6%	56,000	48,000	18.3%
Education	27,000	39,000	-29.3%	145,000	202,000	-28.1%
Other	40,000	27,000	48.9%	156,000	167,000	-6.2%
Total	518,000	710,000	-27.0%	1,656,000	2,064,000	-19.8%

- In the September quarter 2023, **Queensland's largest source markets by OVE** were **New Zealand** (\$253.2m, up 11.2 per cent compared to September 2019), **Japan** (\$146.5 million, up 18.0 per cent), **China** (\$134.2 million, down 68.8 per cent), **the United States of America** (\$107.6 million, up 9.0 per cent compared to September 2019) and **the United Kingdom** (\$97.0 million, up 30.0 per cent compared to September 2019).
- **Korea and Canada** stand out as international markets where visitation in the September 2023 quarter was higher than September quarter 2019. The increase in visitation corresponds with an increase in aviation capacity from both countries into Brisbane.

Executive Summary – International Visitor Survey

Year ending September 2023

Under strict embargo until 12:01 am (AEDT), Wednesday 20th December 2023

Visitation from Korea increased 65.9 per cent compared to the September quarter 2019 with the number of direct seats from Seoul 20 per cent higher than the September 2019 quarter, with 5 flights per week to Brisbane operated by Korean Air that commenced in January 2023 and is supported by AAIF funding.

Visitation from Canada was 16.5 per cent higher in the September 2023 quarter with 17 per cent higher seat capacity than the September 2019 quarter. With the support of AAIF funding, the Air Canada service from Vancouver to Brisbane was restored to a daily frequency from June 2023. Air Canada also increased capacity on this route through the use of the larger B787-9 Dreamliner (298 seats) on this service compared to the B787-8 Dreamliner (254 seats) utilised prior to COVID.

Queensland international aviation capacity in the September 2023 quarter reached 74 per cent of September 2019 levels. As noted above, Canada and Korea were markets where air capacity currently exceeds pre-COVID levels. Capacity from Japan also exceeded 2019 levels, however visitor numbers from Japan were not as quick to return.

Quarterly overnight visitation and expenditure in Queensland, by Market

	Overnight Visitor Expenditure			Visitors		
	Sep 2023	Sep 2019	Change since 2019	Sep 2023	Sep 2019	Change since 2019
New Zealand	\$253.2m	\$227.8m	11.2%	133,000	158,000	-15.8%
United States of America	\$107.6m	\$98.7m	9.0%	45,000	53,000	-15.4%
Japan	\$146.5m	\$124.2m	18.0%	45,000	63,000	-29.0%
United Kingdom	\$97.0m	\$74.6m	30.0%	38,000	42,000	-9.5%
Korea	\$71.3m	\$50.7m	40.7%	28,000	17,000	65.9%
China	\$134.2m	\$429.3m	-68.8%	27,000	116,000	-76.4%
India	\$37.2m	\$32.4m	15.0%	16,000	17,000	-4.6%
Canada	\$78.2m	\$34.7m	125.2%	15,000	13,000	16.5%
Germany	\$39.5m	\$41.8m	-5.6%	15,000	19,000	-21.8%
Singapore	\$53.1m	\$39.7m	33.8%	10,000	20,000	-51.9%
France	\$33.3m	\$24.8m	34.3%	9,000	15,000	-44.2%
Indonesia	\$21.0m	np	np	8,000	np	np
Malaysia	\$35.9m	\$21.5m	67.0%	7,000	12,000	-45.1%
Taiwan	np	\$48.1m	np	np	20,000	np
Hong Kong	np	\$54.0m	np	np	20,000	np
Scandinavia	np	np	np	np	np	np
Netherlands	np	\$13.7m	np	np	7,000	np
Thailand	np	np	np	np	np	np
Italy	np	\$22.6m	np	np	9,000	np
Switzerland	np	np	np	np	np	np
Other Asia	\$57.5m	\$33.9m	69.5%	20,000	16,000	24.2%
Other Europe	\$51.5m	\$59.8m	-13.9%	19,000	22,000	-14.6%
Other Countries	\$225.9m	\$106.8m	111.5%	46,000	49,000	-6.6%
Total International	\$1,591.0m	\$1,600.9m	-0.6%	518,000	710,000	-27.0%

Executive Summary – International Visitor Survey

Year ending September 2023

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Regional – First Nine Months 2023 (Jan-September 2023)

- Regional International visitation can be analysed for the first nine months of 2023 i.e. the period of January – September 2023.
- When it comes to regional performance, **Brisbane** had the largest share of the Queensland's international visitors in the first nine months of 2023 (812,000, 76.8 per cent of visitor numbers in the first nine months of 2019), followed by **Gold Coast** (436,000 visitors, 56.1 per cent of what it was in the first nine months of 2019) and **Tropical North Queensland** (313,000 visitors, 54.2 per cent of what it was in the first nine months of 2019).
- Sunshine Coast** (down 7.8 per cent) and **Townsville** (down 6.0 per cent) were the regions closest to 2019 levels of international visitation.

Nine months overnight visitation and nights, By Region

	Visitors			Nights		
	Jan - Sep 2023	Jan - Sep 2019	Change since 2019	Jan - Sep 2023	Jan - Sep 2019	Change since 2019
Brisbane	812,000	1,058,000	-23.2%	17,907,000	20,753,000	-13.7%
Gold Coast	436,000	777,000	-43.9%	6,424,000	7,610,000	-15.6%
TNQ	313,000	577,000	-45.8%	3,747,000	5,019,000	-25.3%
Sunshine Coast	217,000	235,000	-7.8%	3,442,000	2,114,000	62.8%
Whitsundays	102,000	152,000	-32.7%	838,000	954,000	-12.2%
Townsville	83,000	89,000	-6.0%	952,000	880,000	8.2%
SGBR	68,000	101,000	-32.6%	1,441,000	1,586,000	-9.2%
Fraser Coast	55,000	91,000	-38.9%	280,000	495,000	-43.4%
Queensland	1,381,000	2,002,000	-31.0%	37,158,000	41,481,000	-10.4%

Source: IVS

Holiday nine months of overnight visitation and nights, By Region

	Visitors			Nights		
	Jan - Sep 2023	Jan - Sep 2019	Change since 2019	Jan - Sep 2023	Jan - Sep 2019	Change since 2019
Brisbane	320,000	538,000	-40.6%	3,635,000	5,111,000	-28.9%
Gold Coast	290,000	607,000	-52.2%	2,247,000	3,421,000	-34.3%
TNQ	265,000	533,000	-50.3%	2,546,000	3,943,000	-35.4%
Sunshine Coast	145,000	178,000	-18.3%	931,000	1,090,000	-14.6%
Whitsundays	96,000	146,000	-34.7%	641,000	756,000	-15.2%
Townsville	62,000	71,000	-12.8%	291,000	489,000	-40.5%
SGBR	45,000	78,000	-42.1%	833,000	837,000	-0.5%
Fraser Coast	50,000	80,000	-38.2%	174,000	246,000	-29.1%
Queensland	761,000	1,325,000	-42.5%	11,814,000	16,652,000	-29.1%

Source: IVS

Diving into Townsville and Sunshine Coast's strong performance:

- Three quarters (75 per cent) of **visitors to Townsville** were on holidays in the first nine months of 2023. While holiday visitation was 87.2 per cent of 2019 levels, VFR, accounting for a fifth (19 per cent) of visitors, seemed to be the source of most of the growth (up 38.4 per cent). Top source markets for Townsville in the first nine months of 2023 were **the UK** (accounts 19.4 per cent of visitors, up 10.2 per cent compared to 2019). **Europe** (excl. UK) accounted for two fifths (41 per cent) of total visitation.
- Around two thirds of **Sunshine Coast's** international visitors were on holiday (67 per cent) in the first nine months of 2023, followed by VFR visitors, accounting for almost a third (30 per cent). VFR visitation was up by 30.6 per cent compared to the first nine months of 2019. **New Zealand, Europe** and **the UK** were the leading markets for the Sunshine Coast in the first nine months of 2023. Interestingly, the strongest source of growth for Sunshine Coast in the first nine months of 2023 came from **Asia**, accounting for a sixth of visitors (18 per cent) and sits up 33.4 per cent

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compared to 2019. Coinciding with seat capacity increase from Canada, there were 12,000 visitors from Canada, up 19.7 per cent compared to 2019.

Deep dive into visitation to Townsville and Sunshine Coast – first nine months of 2023

	Townsville			Sunshine Coast		
	Visitors	Change vs 2019	Share	Visitors	Change vs 2019	Share
Total	83,000	-6.0%		217,000	-7.8%	
Holiday	62,000	-12.8%	75%	145,000	-18.3%	67%
VFR	16,000	38.4%	19%	64,000	30.6%	30%
By Market						
New Zealand	5,000	np	6%	57,000	-9.9%	26%
UK	16,000	10.2%	19%	36,000	-7.1%	17%
Europe (excl. UK)	34,000	18.0%	41%	51,000	-20.2%	23%
Asia	np	np	np	39,000	33.4%	18%
North America	10,000	-7.5%	12%	19,000	-28.4%	9%
inc Canada	np	np	np	12,000	19.7%	5%

Source: IVS

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Appendix: Year Ending September 2023 tables

Year ended overnight visitor expenditure share

	Total OVE share	Annual change	Change vs 2019
Queensland	20.4%	↑4.9%	↑1.1%
New South Wales	39.9%	↓1.2%	↑3.7%
Victoria	22.0%	↓6.5%	↓6.1%
Western Australia	8.6%	↑1.6%	↑1.0%
South Australia	4.7%	↑1.2%	↑0.9%
ACT	1.6%	np	↓0.2%
Northern Territory	1.5%	↑0.3%	↑0.2%
Tasmania	1.2%	↑0.2%	↓0.5%

Year ended visitation share

	Total share	Annual change	Change vs 2019
Queensland	29.2%	↑3.9%	↓2.7%
New South Wales	51.0%	↑4.8%	↑0.6%
Victoria	30.4%	↑0.1%	↓5.7%
Western Australia	12.1%	↑1.5%	↑0.7%
South Australia	6.7%	↑2.0%	↑1.1%
ACT	2.8%	↑0.2%	↓0.3%
Northern Territory	3.0%	↑0.8%	↓0.5%
Tasmania	3.0%	↑1.3%	↓0.2%

Expenditure by purpose

	Queensland			Change since 2019
	Expenditure	Annual % change	3yr trend	
Holiday	\$1,937.4m	388.1%	35.5%	-32.3%
VFR	\$1,047.2m	164.0%	74.2%	28.9%
Business	\$352.4m	308.0%	99.8%	21.0%
Employment	\$335.6m	210.8%	79.5%	43.9%
Education	\$1,441.3m	381.5%	39.4%	-20.5%
Other reason	\$456.6m	160.3%	63.4%	50.5%
Total purpose	\$4,339.5m	512.6%	-4.0%	-28.7%

*Change vs 2019 refers to Year Ending December 2019

Leisure is holiday and or VFR travellers. Leisure will be less than the sum of holiday and VFR as visitors can travel for both reasons.

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Key highlights:

Queensland's **total domestic overnight visitor expenditure (OVE)** reached \$29.1 billion, up 18.5 per cent YoY.

Queensland continues to hold its **number 2 position in total domestic OVE market share**, holding 26.8 per cent of total OVE in Australia (down 1.2ppt vs. YE September 2022).

Queensland retained its position as **the leading state for holiday OVE, achieving \$16.1 billion**, up 12.3 per cent YoY. **Queensland maintains the leading position in the holiday market, holding 30.1 per cent of holiday OVE (up 0.1ppt over the year).**

The strong return of business travel has continued in Queensland. **OVE generated from business travel** reached a record \$4.9 billion, up 44.6 per cent YoY. This is **the fourth consecutive business OVE record for Queensland**. Five of the eight other states and territories also reached business OVE records.

Queensland also reached **a record** of \$15.2 billion **in intrastate OVE**, up 9.7 per cent YoY.

Comparison of Queensland's OVE

Queensland	Pre-COVID YE December 2019	Now YE September 2023
Proportion of OVE from Domestic visitors vs International visitors	76 per cent vs. 24 per cent	International inbound travel is recovering slowly. 85 per cent vs. 15 per cent
Domestic		
Proportion of OVE from Intrastate visitors vs Interstate visitors	53 per cent vs. 47 per cent	Similar to the Pre-COVID ratio 52 per cent vs. 48 per cent
Proportion of QLD OVE from those travelling for holiday purposes	45 per cent	Still significantly higher than what it was before COVID 55 per cent

Three regions reached record levels of OVE. They were **Brisbane** (\$7.2 billion, up 35.0 per cent YoY), **Gold Coast** (\$5.8 billion, up 38.4 per cent YoY) and **Mackay** (\$799.5 million, up 25.4 per cent over the three year trend).

Gold Coast also reached a new visitation record of 4.4 million (up 18.8 per cent YoY). This included a record number of holiday visitors (2.4 million, up 15.3 per cent). Sunshine Coast also reached a record number of holiday visitors (2.5 million up 1.7 per cent).

Headwinds continue to be noticeable in most recent quarters which reflect on the impact of the rising cost of living and the slow down of the economy in Australia.

- Australians' outbound travel continues its upward trajectory. In the wake of rising cost of living, it seems that consumers might have opted for an overseas trip rather than an interstate trip, while at the same time, they continue to take intrastate trips within their own states.
- Queensland benefited from the removal of domestic travel restrictions following the pandemic, with holiday OVE growth in the September quarter 2022 (July-September 2022) reaching over 140 per cent YoY. However, consistently high inflation in the last 18 months and its flow on effect, and the high cost of living, has resulted in growth tapering off. OVE has remained stable YoY in the September quarter 2023 following a decrease in the June 2023 quarter.
- It is becoming more prominent that while consumers are still travelling, they are cutting back on their spending when on holiday. In the September 2023 quarter when school holidays occurred, the effects of increases in visitation and inflation were offset by shorter trips and less money being spent on accommodation and food and drink. This is fully aligned with TEQ's quarterly holiday intentions research which suggests that people still intended to travel but would downsize their trips and cut back on their discretionary spend. We may expect some further softer numbers in the coming quarterly annual releases.

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Overnight visitor expenditure

	Holiday \$m	Annual % change	3yr trend	Change vs 2019	Total \$m ³	Annual % change	3yr trend	Change vs 2019
Queensland	\$16,051.6m	12.3%	31.6%	67.5%	\$29,079.5m	18.5%	29.8%	49.6%
New South Wales	\$14,281.5m	12.0%	25.3%	43.1%	\$29,912.8m	23.0%	25.8%	26.4%
Victoria	\$10,737.9m	15.3%	32.7%	42.3%	\$22,540.7m	31.7%	35.4%	32.8%
Western Australia	\$4,980.9m	9.3%	21.6%	54.9%	\$11,648.2m	27.5%	22.8%	36.0%
South Australia	\$3,028.0m	17.4%	21.9%	34.1%	\$6,803.3m	27.2%	25.0%	30.5%
Tasmania	\$2,192.6m	11.9%	17.0%	25.3%	\$3,691.7m	26.2%	21.8%	31.1%
Northern Territory	\$1,431.8m	-8.0%	30.4%	38.2%	\$2,566.1m	0.6%	28.2%	19.2%
ACT	\$585.1m	-4.5%	25.5%	17.0%	\$2,447.1m	34.0%	34.8%	31.5%
Australia	\$53,289.3m	11.9%	27.6%	48.6%	\$108,694.2m	23.8%	28.3%	34.7%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

	VFR \$m	Annual % change	3yr trend	Change vs 2019	Business \$m	Annual % change	3yr trend	Change vs 2019
Queensland	\$4,546.3m	14.7%	26.9%	37.9%	\$4,886.2m	44.6%	31.2%	23.7%
New South Wales	\$5,781.0m	23.9%	25.8%	24.5%	\$5,660.7m	50.2%	26.6%	4.2%
Victoria	\$4,367.2m	42.7%	39.2%	37.4%	\$4,084.7m	71.8%	38.3%	13.1%
Western Australia	\$1,542.2m	12.4%	18.8%	37.4%	\$3,238.5m	84.5%	26.0%	21.0%
South Australia	\$1,274.4m	41.1%	27.2%	42.5%	\$1,464.7m	43.5%	34.9%	26.8%
Tasmania	\$467.1m	43.5%	19.0%	29.6%	\$533.5m	94.0%	37.6%	41.4%
Northern Territory	\$182.9m	-8.2%	21.8%	2.4%	\$630.7m	16.4%	24.8%	-1.4%
ACT	\$626.7m	19.4%	32.0%	46.5%	\$829.2m	106.6%	49.2%	38.8%
Australia	\$18,787.8m	25.1%	28.1%	33.2%	\$21,330.4m	57.8%	31.0%	15.7%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Overnight visitor expenditure market share

	Holiday OVE share	Annual change	Change Vs 2019	Total OVE share	Annual change	Change Vs 2019
Queensland	30.1%	↑0.1%	↑3.4%	26.8%	↓1.2%	↑2.7%
New South Wales	26.8%	●0.0%	↓1.0%	27.5%	↓0.2%	↓1.8%
Victoria	20.2%	↑0.6%	↓0.9%	20.7%	↑1.2%	↓0.3%
Western Australia	9.3%	↓0.2%	↑0.4%	10.7%	↑0.3%	↑0.1%
South Australia	5.7%	↑0.3%	↓0.6%	6.3%	↑0.2%	↓0.2%
Tasmania	4.1%	●0.0%	↓0.8%	3.4%	↑0.1%	↓0.1%
Northern Territory	2.7%	↓0.6%	↓0.2%	2.4%	↓0.5%	↓0.3%
ACT	1.1%	↓0.2%	↓0.3%	2.3%	↑0.2%	↓0.1%

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Overnight visitor trips

	Holiday visitors	Annual % change	3yr trend	Change vs 2019	Total visitors ³	Annual % change	3yr trend	Change vs 2019
Queensland	11,045,000	3.4%	16.0%	10.4%	25,214,000	3.3%	10.6%	-2.7%
New South Wales	15,345,000	11.2%	15.6%	3.7%	36,142,000	12.2%	11.2%	-7.3%
Victoria	12,630,000	7.2%	21.0%	1.4%	27,970,000	15.6%	18.3%	-6.0%
Western Australia	4,538,000	1.9%	9.1%	7.1%	11,129,000	8.4%	7.2%	1.0%
South Australia	3,015,000	-0.2%	5.8%	-8.1%	7,443,000	10.3%	7.8%	-8.0%
Tasmania	1,503,000	-5.7%	7.8%	-11.7%	2,995,000	3.9%	9.1%	-6.9%
Northern Territory	704,000	-12.9%	12.6%	-6.3%	1,389,000	-5.8%	8.6%	-18.4%
ACT	773,000	7.9%	20.5%	-10.4%	3,175,000	21.3%	18.9%	-0.9%
Australia	47,678,000	5.3%	14.9%	3.1%	111,610,000	9.9%	11.8%	-5.0%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

	VFR visitors	Annual % change	3yr trend	Change vs 2019	Business visitors	Annual % change	3yr trend	Change vs 2019
Queensland	7,938,000	-0.2%	7.0%	-11.3%	5,255,000	12.0%	8.3%	-14.2%
New South Wales	12,684,000	11.7%	9.6%	-9.8%	6,681,000	18.6%	7.4%	-19.9%
Victoria	9,776,000	20.3%	18.7%	-4.9%	4,546,000	29.4%	11.9%	-21.8%
Western Australia	2,903,000	6.3%	5.1%	0.2%	3,234,000	19.9%	6.0%	-5.8%
South Australia	2,414,000	27.1%	11.8%	1.0%	1,657,000	11.6%	11.5%	-9.8%
Tasmania	829,000	19.3%	9.8%	4.3%	557,000	18.7%	13.0%	-9.9%
Northern Territory	184,000	-2.7%	14.0%	-13.4%	456,000	4.0%	2.0%	-33.5%
ACT	1,213,000	17.1%	16.9%	14.0%	912,000	38.8%	16.8%	-14.1%
Australia	37,212,000	11.2%	10.8%	-6.8%	22,789,000	19.2%	9.0%	-15.7%

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Note: Yellow highlights indicates a record

Overnight visitor nights

	Holiday nights	Annual % change	3yr trend	Change vs 2019	Total nights ³	Annual % change	3yr trend	Change vs 2019
Queensland	48,027,000	-1.0%	18.1%	10.7%	99,808,000	-1.3%	10.6%	-3.1%
New South Wales	51,205,000	7.1%	14.1%	1.1%	116,246,000	10.4%	9.6%	-5.1%
Victoria	38,428,000	7.6%	17.7%	7.2%	82,120,000	15.0%	15.2%	-1.7%
Western Australia	18,583,000	-3.4%	8.6%	6.2%	49,524,000	6.1%	6.2%	-1.4%
South Australia	10,961,000	-3.2%	6.3%	-8.7%	26,526,000	8.4%	8.4%	-4.9%
Tasmania	7,032,000	3.4%	7.2%	-7.9%	12,590,000	14.0%	5.8%	-1.8%
Northern Territory	3,439,000	-27.1%	16.1%	-16.9%	7,226,000	-20.8%	8.5%	-21.5%
ACT	1,809,000	1.7%	20.4%	-2.3%	8,837,000	18.0%	14.0%	1.1%
Australia	179,490,000	2.1%	14.4%	3.7%	402,904,000	7.0%	10.3%	-3.6%

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	VFR nights	Annual % change	3yr trend	Change vs 2019	Business nights	Annual % change	3yr trend	Change vs 2019
Queensland	27,428,000	-6.2%	6.9%	-10.8%	18,219,000	-0.4%	2.5%	-19.7%
New South Wales	39,242,000	11.5%	10.5%	-5.2%	19,856,000	18.3%	4.0%	-13.5%
Victoria	26,780,000	18.1%	14.8%	-5.3%	13,105,000	37.5%	13.9%	-10.8%
Western Australia	9,558,000	3.9%	3.3%	-10.6%	18,768,000	16.5%	4.4%	-5.6%
South Australia	8,316,000	26.4%	11.7%	9.5%	6,087,000	26.7%	17.2%	7.0%
Tasmania	2,900,000	17.5%	-0.3%	-3.7%	1,877,000	65.3%	9.4%	14.4%
Northern Territory	927,000	-21.2%	7.9%	-38.6%	2,538,000	-9.3%	0.5%	-19.9%
ACT	3,754,000	8.6%	13.6%	16.2%	2,401,000	50.6%	9.0%	-18.3%
Australia	118,906,000	8.1%	9.6%	-6.0%	82,855,000	16.6%	5.9%	-11.5%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Notes:

1. State visitation does not add to the Australian total as some visitors will make stopovers in more than one state.
2. "Total visitors" includes holiday, visiting friends or relatives (VFR), business, and other reasons for visiting.

For the year ending September 2023, we are comparing the period of 1 October 2022 - 30 September 2023 with the period of 1 October 2021-30 September 2022 when border restrictions were still in place in the December quarter of 2021.

National results

- Domestic overnight visitor expenditure (OVE) within Australia reached a record \$108.7 billion (up 23.8 per cent YoY) in the year ending September 2023. This was due to strong growth in OVE generated from holiday, visiting friends and relatives (VFR) and Business travel. In particular, OVE generated from business travel (\$21.3 billion, up 57.8 per cent) and VFR (\$18.8 billion, up 25.1 per cent) reached new records.

In the YE September 2023, Victoria, South Australia, Western Australia and ACT reached records in domestic OVE.

- Queensland continues to hold its number 2 position in total domestic OVE market share, holding 26.8 per cent of total OVE in Australia (down 1.2ppt vs YE September 2022).

Victoria gained significant OVE market share in the year ending September 2023 up 1.2 percentage points. New South Wales maintained its number 1 position, holding the largest market share of 27.5 per cent. However, New South Wales market share was down 0.2 percentage points. In recent quarters, New South Wales had regained market share rapidly, but the benefits from reopening have already filtered through the results, similar to Queensland.

- Domestic overnight visitation within Australia was 111.6 million trips (up 9.9 per cent YoY), slightly less than what it was pre-COVID (down 5.0 per cent). This means that, on average, every Australian aged 15 years and over took around 5.1 overnight trips within Australia in the year ending September 2023.

Only holiday visitation has exceeded pre-COVID levels, achieving 47.7 million visitors, up 3.1 per cent compared to 2019. Holiday visitation was up 5.3 per cent YoY in Australia. Having said that, the strongest growth in visitation by purpose over the year was business travel (22.8 million, up 19.2 per cent YoY) and VFR travel (37.2 million, up 11.2 per cent YoY).

Queensland results

- Queensland had a strong growth in OVE, reaching \$29.1 billion, up 18.5 per cent YoY. Queensland continued to hold its position as the leading state for holiday OVE, achieving \$16.1 billion, up 12.3 per cent YoY.

The strong return of business travel has continued in Queensland. OVE generated from business travel reached a record \$4.9 billion, up 44.6 per cent YoY and up 23.7 per cent compared with 2019. This is the fourth consecutive business OVE record in Queensland. Business visitation to Queensland also had strong growth over the year, up 12.0 per cent YoY to 5.3 million business visitors, albeit it was still down 14.2 per cent comparing with 2019.

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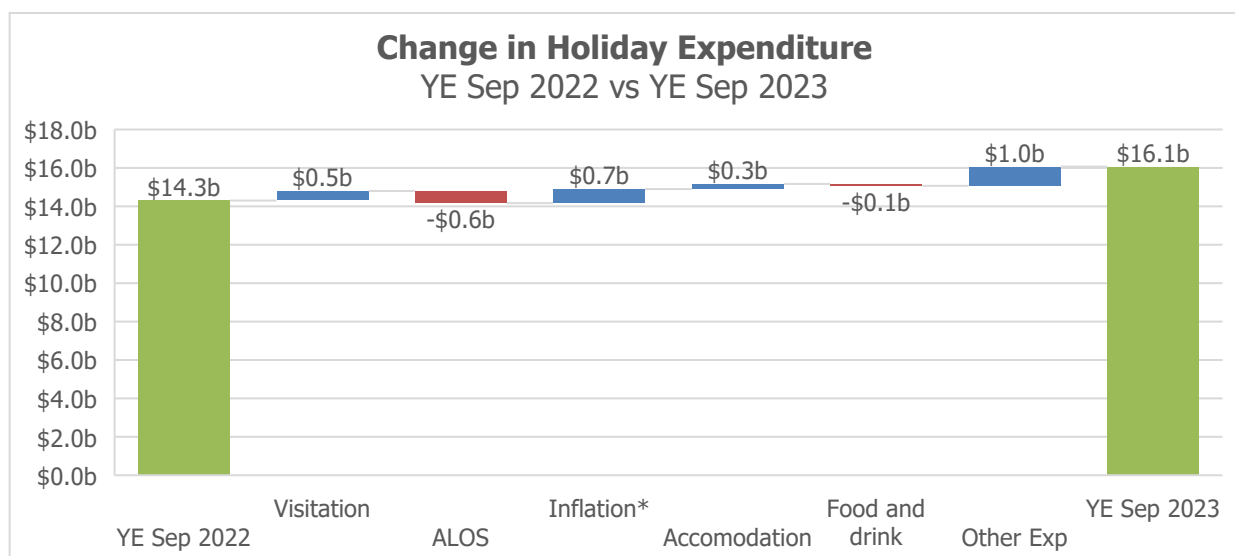
- Queensland welcomed 25.2 million domestic visitors in the year ending September 2023, up 3.3 per cent YoY, and slightly lower than what it was before COVID (down 2.7 per cent compared to 2019). Among these visitors, Queensland welcomed 11.0 million holiday visitors (up 3.4 per cent YoY, and up 10.4 per cent compared with 2019). These holiday visitors stayed 48.0 million holiday nights (down 1.0 per cent YoY, but up 10.7 per cent compared with 2019).
- During COVID, the average length of stay (ALoS) of domestic travellers in Queensland increased. ALoS has returned to pre-COVID levels for Queensland, while for NSW and VIC ALoS is now below pre-COVID levels as consumers cut back on trip lengths.

Average Length of Stay in Queensland by purpose

ALoS	ALoS	Annual change	# change	3-yr trend	change Since 2011	# change
Queensland	4.0	-4.5%	-0.2	0.3%	-0.4%	0.0
Holiday	4.3	-4.3%	-0.2	2.9%	0.3%	0.0
VFR	3.5	-6.0%	-0.2	0.1%	0.5%	0.0
Business	3.5	-11.1%	-0.4	-4.9%	-6.4%	0.2
Other (incl employ and ed	4.1	30.3%	1.0	-2.1%	-3.5%	0.1
New South Wales	3.2	-1.6%	-0.1	-1.2%	2.3%	-0.1
Holiday	3.3	-3.7%	-0.1	-0.9%	-2.5%	0.1
VFR	3.1	-0.2%	0.0	1.0%	5.1%	-0.2
Business	3.0	-0.2%	0.0	-2.8%	8.0%	-0.3
Other (incl employ and ed	2.6	-0.1%	0.0	-11.4%	-7.7%	0.2
Victoria	2.9	-0.5%	0.0	-2.4%	4.6%	-0.1
Holiday	3.0	0.4%	0.0	-2.9%	5.7%	-0.2
VFR	2.7	-1.8%	-0.1	-3.1%	-0.4%	0.0
Business	2.9	6.2%	0.2	1.5%	14.0%	-0.5
Other (incl employ and ed	2.7	-13.6%	-0.4	-6.7%	-1.4%	0.0

Source: NVS

- Queensland maintains the leading position in the holiday market, holding 30.1 per cent of holiday OVE (up 0.1 ppt over the year). Victoria gained market share (up 0.6 ppt to 20.2 per cent), while New South Wales market share was steady at 26.8 per cent.
- Where the holiday OVE growth came from:
While inflation contributed to the holiday OVE growth YoY, expenditure generated from the increase in holiday visitation, increase in accommodation spend and other expenditure (such as increase in domestic affairs and organised tours and entertainment expenditure) are the main contributors to the domestic holiday OVE growth in Queensland over the year.



*Inflation based on Queensland CPI

Source: NVS and ABS

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- It is also worth noting that OVE generated from intrastate travel in Queensland reached a record \$15.2 billion, up 9.7 per cent YoY. This was driven by record intrastate business OVE (\$2.7b, up 32.7 per cent YoY).
- On the other hand, holiday OVE generated by intrastate visitors was slightly down by 1.3 per cent to \$7.0 billion, while holiday OVE generated by interstate visitors was up 25.6 per cent YoY to \$9.1 billion.

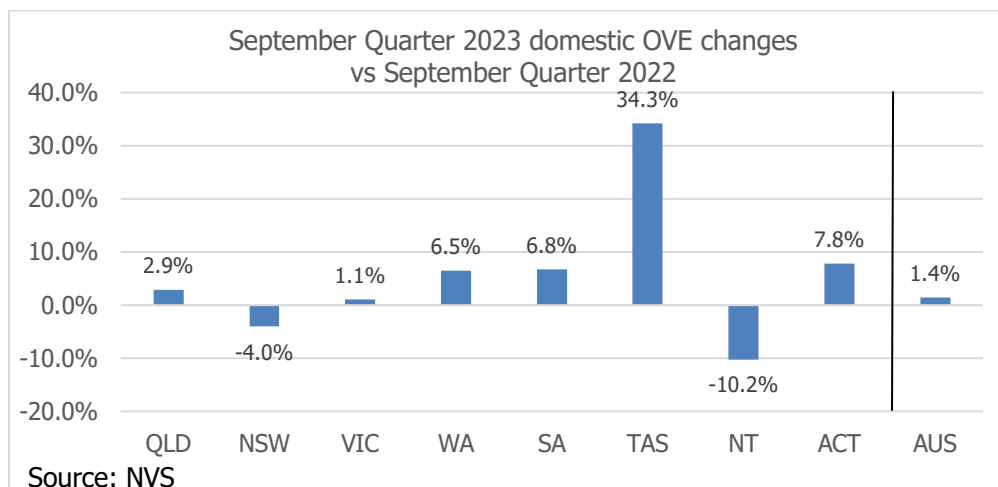
Queensland intrastate and interstate performance

	Total purpose					Holiday				
	Total \$m ³	Annual % change	3yr trend	Change vs 2019*	Market share	Holiday \$m	Annual % change	3yr trend	Change vs 2019*	Market share
Intrastate	\$15,202.5m	9.7%	20.3%	48.8%	52.3% (↓4.2%)	\$6,984.1m	-1.3%	18.9%	68.1%	43.5% (↓6.0%)
Interstate	\$13,877.0m	29.8%	44.8%	50.4%	47.7% (↑4.2%)	\$9,067.5m	25.6%	47.3%	67.1%	56.5% (↑6.0%)
Total Domestic	\$29,079.5m	18.5%	29.8%	49.6%	100%	\$16,051.6m	12.3%	31.6%	67.5%	100%

- *Change vs 2019 refers to Year Ending December 2019
- Note: Yellow highlights indicates a record

September Quarter 2023 Deep Dive

- Nationally OVE was up 1.4 per cent in the September quarter 2023 compared to the September quarter 2022. OVE grew across most of the states, with Tasmania (up 34.3 per cent) growing particularly strongly. OVE in Queensland (up 2.9 per cent) grew more than the Australian average. OVE in New South Wales (down 4.0 per cent) and Northern Territory (down 10.2 per cent) decreased.



- In the September 2023 quarter, while OVE in Queensland grew over the year, visitation was steady (down 0.8 per cent) and nights were down 5.2 per cent.
- Both **Queensland intrastate visitation** (up 2.8 per cent) and OVE generated by intrastate visitors (up 4.5 per cent) were up YoY in the September quarter, while **interstate visitation** was down YoY (down 8.1 per cent), and OVE generated by interstate visitors was up slightly by 1.4 per cent YoY.

Queensland Quarterly Domestic Visitation and Spend

	Visitation				Overnight Visitation Expenditure			
	Sep 2023	Sep 2022	Change over the Year	Change vs 2019*	Sep 2023	Sep 2022	Change over the Year	Change vs 2019*
Interstate	2,103,000	2,288,000	-8.1%	-5.9%	\$4,397.0m	\$4,335.3m	1.4%	50.8%
Intrastate	4,782,000	4,652,000	2.8%	9.2%	\$4,107.1m	\$3,930.8m	4.5%	67.3%
Total	6,885,000	6,940,000	-0.8%	4.1%	\$8,504.2m	\$8,266.1m	2.9%	58.4%

*Change compared to the September quarter 2019

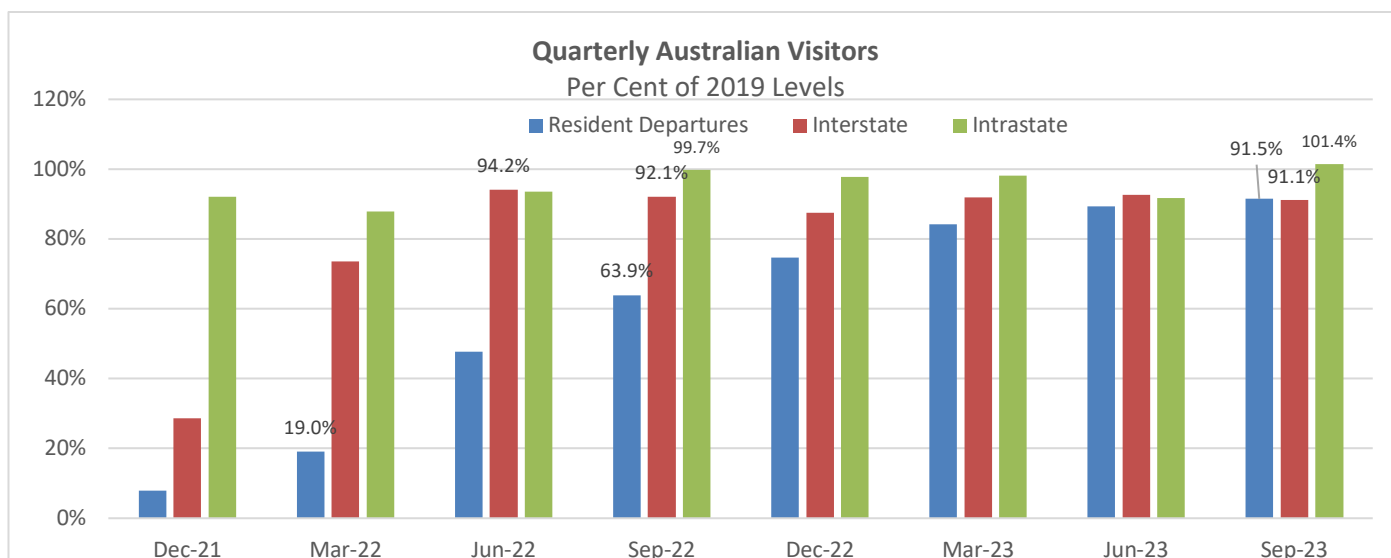
Executive Summary – National Visitor Survey

Year ending September 2023

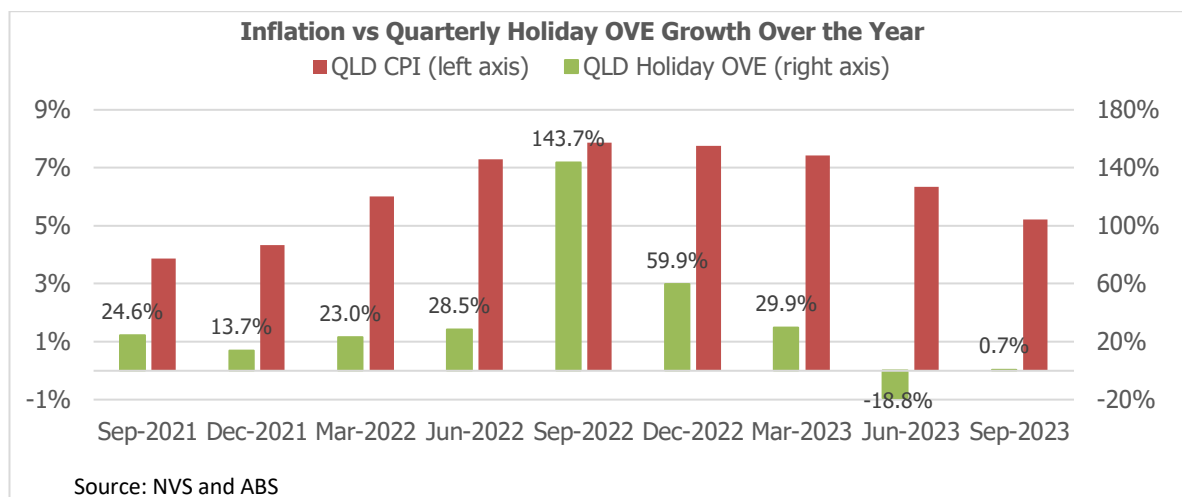
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Headwinds continue to be noticeable in most recent quarters which reflect on the impact of rising cost of living and slowdown economy in Australia

- At the national level, since the Australian border reopening in January 2022, we started to see strong recovery of outbound travel, growing from 19.0 per cent of 2019 levels in the March 2022 quarter to 91.5 per cent of 2019 levels in the September 2023 quarter if we compare with the same periods in 2019. At the same time, interstate travel reached its peak in the June 2022 quarter at 94.2 per cent of what it was in 2019, and has stabilised since then. Intrastate travel exceeded the 2019 level in the September quarter 2023, reaching 101.4 per cent of 2019 levels.
- Queensland benefited from the removal of domestic travel restrictions following the pandemic, with holiday OVE growth in the September quarter 2022 (July-September 2022) reaching over 140 per cent YoY. However, consistently high inflation in the last 18 months and its flow on effect, and the high cost of living, has resulted in growth tapering off. OVE has remained stable YoY in the September quarter 2023 following a decrease in the June 2023 quarter.



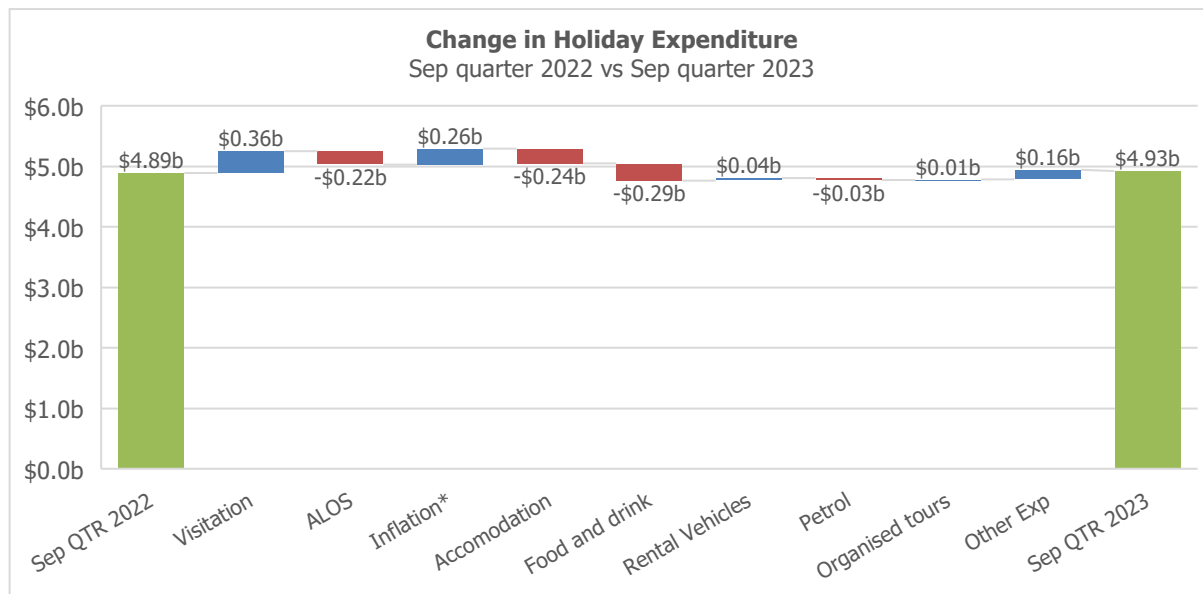
- It is becoming more prominent that while consumers are still travelling, they are cutting back on their spending when on holiday. In the September 2023 quarter when school holidays occurred, the effects of increases in visitation and inflation were offset by shorter trips and less money being spent on accommodation and food and drink. This is fully aligned with TEQ's quarterly holiday intentions research which suggests that people still intended to travel but would downsize their trips and cut back on their discretionary spend. We may expect some further softer numbers in the coming quarterly annual releases.



Executive Summary – National Visitor Survey

Year ending September 2023

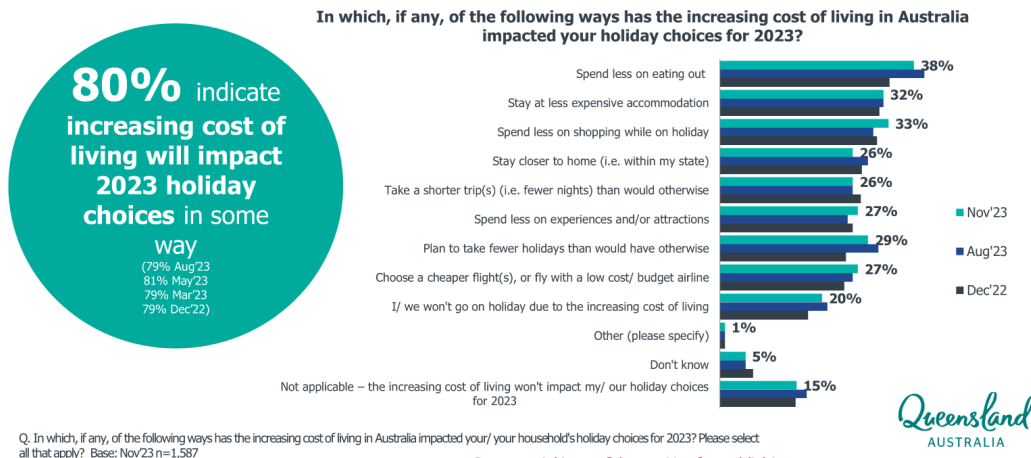
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*Inflation based on Queensland CPI Source: NVS and ABS

Cost of living impact – Holiday Intentions September 2023

No change in cost of living impact on holiday choices over past eight months. Most continue to plan to downsize trips.



Source: TEQ quarterly holiday intentions survey

Executive Summary – National Visitor Survey

Year ending September 2023

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Regional Overview, year ending September 2023

Overnight visitor expenditure

	Total \$m	Annual % change	3yr trend	Change vs 2019
Brisbane	\$7,210.4m	35.0%	34.5%	36.8%
Gold Coast	\$5,801.2m	38.4%	38.1%	57.2%
Sunshine Coast	\$4,218.7m	11.8%	25.4%	53.7%
TNQ	\$4,180.5m	4.7%	31.9%	66.7%
SGBR	\$1,650.3m	11.0%	19.9%	37.8%
SQC	\$1,284.2m	6.8%	24.9%	52.8%
Whitsundays*	\$1,280.0m	-16.3%	28.4%	135.8%
Townsville	\$1,104.8m	10.0%	24.2%	39.9%
Outback*	\$871.8m	28.6%	18.2%	11.1%
Mackay*	\$799.5m	37.0%	25.4%	55.2%
Fraser Coast*	\$620.4m	-3.1%	24.0%	50.5%

* Note: due to the volatility of small sample sizes for Fraser Coast, Mackay, Whitsundays and Outback, data needs to be treated with caution.

#Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Visitor trips by region, year ending September 2023

	Holiday visitors	Annual % change	3yr trend	Change vs 2019	Total visitors	Annual % change	3yr trend	Change vs 2019
Brisbane	2,407,000	17.1%	20.8%	5.4%	7,111,000	6.4%	10.6%	-11.2%
Gold Coast	2,417,000	15.3%	22.3%	11.7%	4,420,000	18.8%	18.9%	5.2%
Sunshine Coast	2,496,000	1.7%	10.8%	12.9%	4,161,000	2.0%	9.0%	2.8%
TNQ	1,454,000	4.3%	21.4%	26.4%	2,496,000	4.5%	16.1%	12.5%
SGBR	842,000	0.3%	11.7%	14.5%	2,240,000	0.1%	7.0%	-3.3%
SQC	882,000	-9.3%	16.1%	26.5%	2,483,000	-8.8%	9.2%	3.5%
Whitsundays*	513,000	-19.7%	15.8%	30.3%	729,000	-20.8%	10.5%	15.5%
Townsville	440,000	-9.2%	13.9%	9.2%	1,075,000	-13.7%	8.1%	-17.1%
Outback*	256,000	-26.6%	3.7%	-24.2%	1,001,000	10.4%	4.2%	-13.1%
Mackay*	244,000	-10.8%	9.1%	16.9%	1,093,000	-11.3%	2.2%	2.7%
Fraser Coast*	430,000	-5.9%	14.6%	6.7%	791,000	-9.0%	10.4%	3.1%

* Note: due to the volatility of small sample sizes for Fraser Coast, Mackay, Whitsundays and Outback, data needs to be treated with caution.

#Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Visitor nights by region, year ending September 2023

	Holiday nights	Annual % change	3yr trend	Change vs 2019	Total nights	Annual % change	3yr trend	Change vs 2019*
Brisbane	6,647,000	0.6%	18.7%	6.9%	21,308,000	-2.3%	10.4%	-8.2%
Gold Coast	9,938,000	18.7%	25.1%	5.5%	16,037,000	17.5%	20.8%	-3.1%
Sunshine Coast	10,008,000	2.5%	12.8%	11.9%	15,300,000	5.6%	10.3%	5.2%
TNQ	7,925,000	-4.3%	24.6%	29.2%	12,563,000	-7.0%	15.8%	12.3%
SGBR	3,272,000	2.4%	17.3%	11.4%	8,120,000	6.8%	5.2%	-10.3%
SQC	2,223,000	-9.8%	17.5%	26.6%	7,417,000	3.6%	11.5%	16.5%
Whitsundays*	2,468,000	-26.0%	17.9%	38.1%	3,087,000	-37.5%	8.5%	10.7%
Townsville	1,749,000	8.0%	22.4%	39.3%	4,408,000	-8.7%	9.8%	-7.9%
Outback*	849,000	-58.0%	-4.6%	-45.2%	4,158,000	-9.6%	-2.3%	-31.9%
Mackay*	709,000	15.5%	13.0%	22.0%	3,756,000	-22.6%	-4.7%	-14.3%
Fraser Coast*	1,846,000	-7.7%	13.7%	-12.1%	3,161,000	-3.4%	13.9%	3.1%

* Note: due to the volatility of small sample sizes for Fraser Coast, Mackay, Whitsundays and Outback, data needs to be treated with caution.

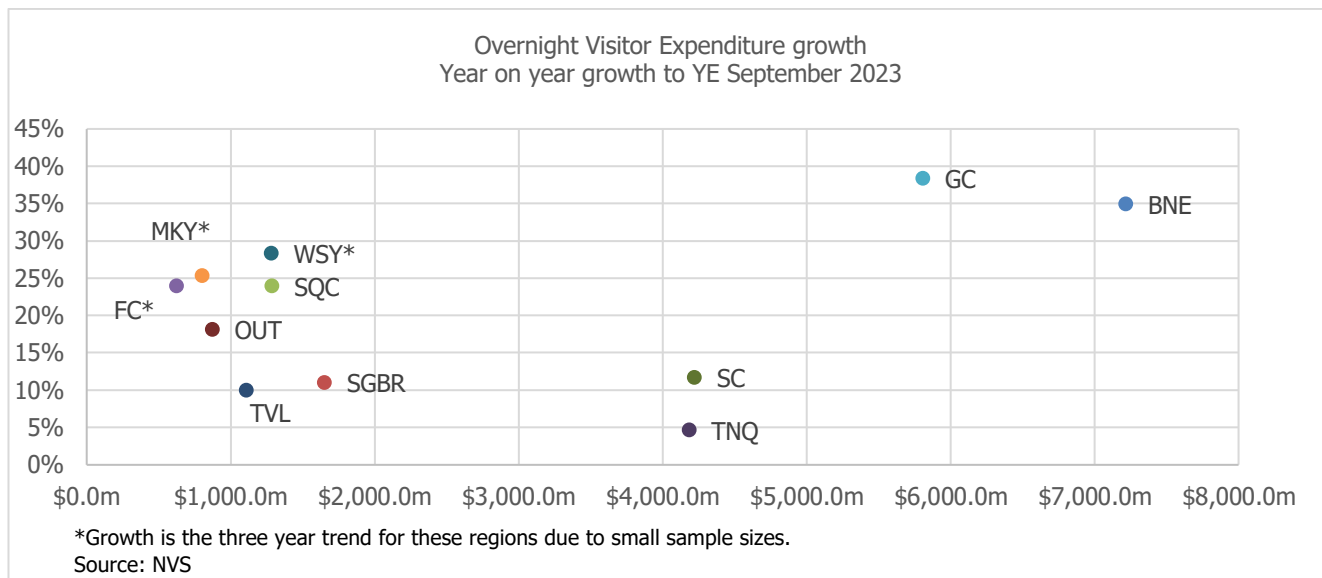
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Executive Summary – National Visitor Survey

Year ending September 2023

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- All Queensland regions achieved well above 2019 levels of OVE.
- Three regions reached record levels of OVE. They were **Brisbane** (\$7.2 billion, up 35.0 per cent YoY), **Gold Coast** (\$5.8 billion, up 38.4 per cent) and **Mackay** (\$799.5 million, up 25.4 per cent over the three year trend).
- Gold Coast** also reached a new visitation record of 4.4 million (up 18.8 per cent YoY). This included a record number of holiday visitors (2.4 million, up 15.3 per cent). **Sunshine Coast** also reached a record number of holiday visitors (2.5 million, up 1.7 per cent).

The September quarter performance

Looking specifically **at the September quarter 2023**, within the seven regions that can be analysed on a quarterly basis, **Sunshine Coast** (visitation up 29.8 per cent and nights up 33.1 per cent) and **Gold Coast** (visitation up 10.1 per cent and nights up 17.9 per cent) surpassed visitation and nights from the September quarter 2022. **Southern Queensland Country** (nights up 9.4 per cent) and **Townsville** (nights up 16.0 per cent) both increased visitor nights over the year, despite visitation decreasing.

It is worth noting that, among reportable regions, both **Gold Coast** and **Sunshine Coast** saw increases in both interstate and intrastate visitation in the September quarter 2023.

Quarterly Domestic Visitation, by Region

	Visitation				Nights			
	Sep 2023	Sep 2022	Change over the Year	Change vs 2019*	Sep 2023	Sep 2022	Change over the Year	Change vs 2019*
Brisbane	1,914,000	2,014,000	-5.0%	-7.2%	5,931,000	7,003,000	-15.3%	3.7%
Sunshine Coast	1,206,000	929,000	29.8%	31.1%	4,437,000	3,334,000	33.1%	24.7%
Southern Queensland Country	739,000	761,000	-2.8%	6.8%	2,116,000	1,935,000	9.4%	18.6%
Gold Coast	1,077,000	978,000	10.1%	5.6%	3,960,000	3,358,000	17.9%	-10.0%
SGBR	651,000	724,000	-10.1%	8.1%	2,186,000	2,666,000	-18.0%	-22.2%
Tropical North Queensland	777,000	822,000	-5.5%	9.8%	4,764,000	5,109,000	-6.7%	18.8%
Townsville	396,000	396,000	-0.1%	3.7%	1,775,000	1,531,000	16.0%	38.5%
Total	6,885,000	6,940,000	-0.8%	4.1%	29,804,000	31,437,000	-5.2%	3.9%

*Change compared to the September quarter 2019

Note: Fraser Coast, Mackay, Whitsundays and Outback regions are not included due to small sample sizes.

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Quarterly Intrastate and Interstate Visitation, By Region

	Intrastate				Interstate			
	Sep 2023	Sep 2022	Change over the Year	Change vs 2019*	Sep 2023	Sep 2022	Change over the Year	Change vs 2019*
Brisbane	1,074,000	1,066,000	0.7%	-5.3%	840,000	948,000	-11.4%	-9.5%
Sunshine Coast	795,000	595,000	33.7%	32.8%	410,000	334,000	22.8%	27.9%
Southern Queensland Country	610,000	597,000	2.1%	9.1%	np	163,000	np	np
Gold Coast	528,000	473,000	11.7%	19.7%	548,000	505,000	8.6%	-5.1%
SGBR	567,000	627,000	-9.5%	14.0%	np	np	np	np
Tropical North Queensland	447,000	465,000	-4.0%	11.3%	330,000	357,000	-7.6%	7.8%
Townsville	268,000	282,000	-5.0%	-5.4%	np	np	np	np
Total	4,782,000	4,652,000	2.8%	9.2%	2,103,000	2,288,000	-8.1%	-5.9%

*Change compared to the September quarter 2019

Note: Fraser Coast, Mackay, Whitsundays and Outback regions are not included due to small sample sizes.

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Frequently asked questions

Where do the numbers come from?

The National Visitor Survey (NVS) commenced in 1998 to provide an official measure of travel by Australian residents. NVS definitions are based on those provided by the United Nations World Tourism Organization (UNWTO). Interviews are conducted with people who have travelled for purposes including holiday, visiting friends and relatives (VFR), business, education and employment. To be included, travellers must not have been away from home continuously for more than 364 days, or 365 days in a leap year.

Respondents interviewed in the NVS are randomly sampled to be representative of the Australian population. The NVS is co-funded by the Commonwealth, state and territory governments under the auspices of the Australian Standing Committee on Tourism (ASCOT). Results from the NVS are published quarterly and are available from tra.gov.au. For full methodology details please visit <https://www.tra.gov.au/en/domestic/national-visitor-survey-methodology>

What are the limitations of the data?

The NVS is conducted with a sample of Australian residents. The NVS is not a census of all visitors so contain sample error.

To minimise sample error, results published from the NVS refer to year ended data only. Quarterly data is provided in this document but should be used with caution. Quarterly data is subject to higher sample error and seasonal variations that may occur between quarters. Seasonal variations are effectively eliminated when using year ended data.

NVS 95% confidence intervals (yearly data):

Region	95% confidence interval
Brisbane	±4.1%
Gold Coast	±5.8%
Sunshine Coast	±5.9%
Southern Great Barrier Reef	±7.5%
Tropical North Queensland	±7.6%
Southern Queensland Country	±7.7%
Townsville	±9.4%
Mackay	±11.3%
Outback Queensland	±11.7%
Fraser Coast	±12.6%
Whitsundays	±13.6%

Why don't the numbers add up?

Domestic visitor numbers to the states of Australia will never sum to the national total.

The reason for this is that domestic visitors may visit more than one state. Visitors are counted each time they visit a state or region but are only counted once in the total for Australia to prevent double counting visitors.

The same concept applies to tourism region data not summing to state totals.

Why aren't variances the same for holiday visitors, total visitors and visitor expenditure?

'Total visitors' includes holiday, VFR, business and other reasons for visiting such as education and employment. Movements in VFR or other purposes of visit often impact the changes seen in overall visitation or expenditure.

Why is the data provided under embargo?

Tourism Research Australia provide the IVS and NVS data under embargo to allow key stakeholders (predominantly those who fund the research) time to brief internal stakeholders and prepare research publications that can be released at the same time data is publicly released by Tourism Research Australia. Any breach of the embargo period is likely to result in TRA no longer providing stakeholders with the data prior to public release.

Domestic Tourism Snapshot

Year ending September 2023



Domestic overnight visitors within Australia

	Visitors	Annual ¹ change	Change vs YE Dec 2019	Avg ² stay	Annual # change
Total Australia ³	111,610,000	9.9%	-5.0%	3.6	-0.1
Holiday	47,678,000	5.3%	3.1%	3.8	-0.1
VFR ⁴	37,212,000	11.2%	-6.8%	3.2	-0.1
Business	22,789,000	19.2%	-15.7%	3.6	-0.1

Intrastate ³	79,063,000	4.2%	-2.8%	2.9	-0.1
Holiday	35,262,000	-0.5%	3.7%	3.0	-0.2
VFR ⁴	26,431,000	7.9%	-6.9%	2.4	-0.1
Business	13,405,000	8.4%	-9.1%	3.5	0.0

Interstate ³	34,785,000	26.6%	-9.3%	4.9	-0.4
Holiday	13,537,000	26.5%	2.5%	5.4	-0.5
VFR ⁴	11,197,000	20.5%	-6.2%	5.0	-0.2
Business	9,633,000	38.3%	-23.4%	3.7	-0.2

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual ¹ change	Change vs YE Dec 2019
Total Australia ⁵	\$108,694.2m	23.8%	34.7%
Holiday ⁶	\$53,289.3m	11.9%	48.6%
VFR ⁶	\$18,787.8m	25.1%	33.2%
Business ⁶	\$21,330.4m	57.8%	15.7%



MALENY, SUNSHINE COAST

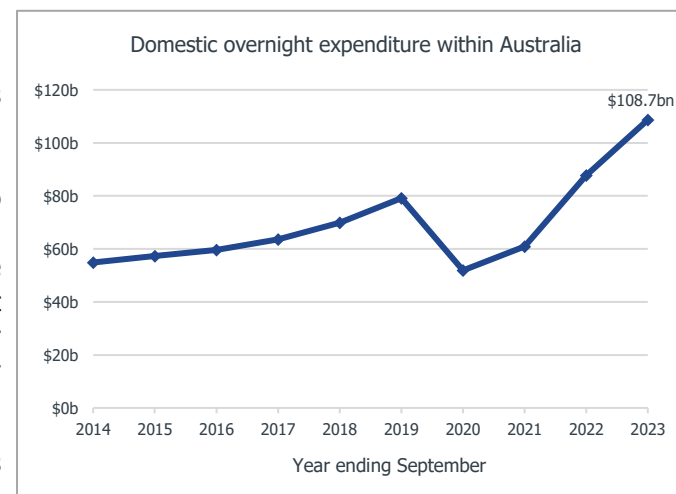
Business Travel Gains Momentum

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

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

On the other hand Holiday OVE (\$53.3 billion, up 11.9 per cent) and visitation (47.7 million, up 5.3 per cent) had more modest growth over the year. However, in recent quarters the combined headwinds of higher cost living and weaker economic conditions have taken effect. At the same time outward travel continues on an upward trajectory and consumers may be starting to opt for overseas travel may come at the expense of interstate holidays. As a result the average length of stay for interstate holidays has decreased 0.5 nights to 5.4 nights.

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



COOLUM BEACH, SUNSHINE COAST

Domestic Tourism Snapshot

Year ending September 2023



Domestic overnight visitors in Queensland

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

Domestic overnight visitor expenditure in Queensland

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



CURRUMBIN, GOLD COAST

Business Expenditure Reaching More Records

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

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

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

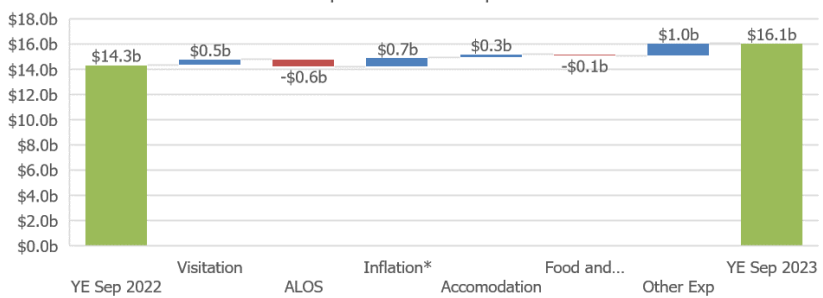
Intrastate OVE in Queensland reached a record of \$15.2 billion (up 9.7 per cent). This has occurred despite intrastate visitation decreasing. Instead it reflects that the average spend per night increased 19.3 per cent over the year to \$276.

On the other hand, interstate OVE was the largest source of OVE growth in Queensland (up 29.8 per cent to \$13.9 billion). This was inline with the increase in interstate visitation (up by 19.9 per cent to 7.7 million). Over the 12 months there was a large influx of interstate visitation to Queensland enjoying the ability to travel without border restrictions, particularly earlier in the year ending September 2023. Interstate spend per night was up 19.7 per cent to \$310. In the most recent quarters the growth in interstate travel may be tapering off due to cost of living challenges and a preference for Australians to travel overseas. This is apparent in the shortening of interstate ALOS by 0.6 nights over they year to 5.8 nights.

OVE growth across the regions

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

Change in Holiday Expenditure YE Sep 2022 vs YE Sep 2023



NOOSA HEADS, SUNSHINE COAST

Domestic Tourism Snapshot

Year ending September 2023



Domestic visitors by region

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

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

Expenditure in Queensland regions

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

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

KURANDA, TROPICAL NORTH QUEENSLAND



Brisbane

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

Fraser Coast

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

Gold Coast

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

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

Mackay

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

Outback Queensland

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

Southern Great Barrier Reef

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

Intrastate visitation

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

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

Interstate visitation

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

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



YANDINA, SUNSHINE COAST

Domestic Tourism Snapshot

Year ending September 2023



Domestic visitors by region

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

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

Expenditure in Queensland regions

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

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

MAGNETIC ISLAND, TOWNSVILLE NORTH QUEENSLAND



Southern Queensland Country (SQC)

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

Sunshine Coast

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

Townsville

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

Tropical North Queensland (TNQ)

Over the year, domestic OVE grew by 4.7 per cent to \$4.2 billion, which was due to a 4.5 per cent increase in visitation to 2.5 million. Domestic OVE is 66.7 per cent above pre-COVID-19 levels. There was a decrease in the average length of stay over the year (down 0.6 nights to 5.0 nights) which led to visitor nights decreasing 7.0 per cent to 12.6 million. However, the average spend per night increased by 12.6 per cent to \$333. Interstate visitation grew by 11.6 per cent to 897,000, led by visitation from New South Wales which was up 23.9 per cent to 344,000. Visitation from Victoria also grew over the year (up 4.1 per cent to 378,000). Visitation from intrastate was steady (up 0.9 per cent) at 1.6 million. However, TNQ welcomed a record number of intra-regional visitors (805,000, up 18.9 per cent) and visitors from Townsville (up 10.9 per cent to 317,0000).

Whitsundays

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

Intrastate visitation

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

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

Interstate visitation

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

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

MOOLOOLABA, SUNSHINE COAST



Domestic Tourism Snapshot

Year ending September 2023



State expenditure comparison

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

State visitation comparison

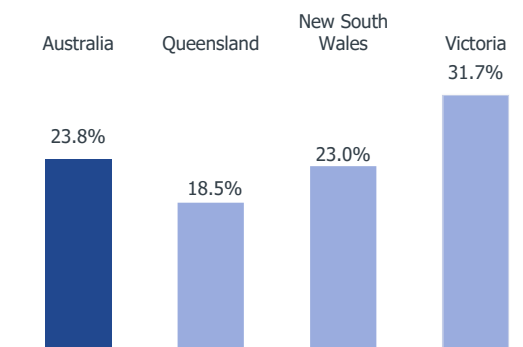
	Visitors	Annual Change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Australia	111,610,000	9.9%	-5.0%	3.6	-0.1
Queensland	25,214,000	3.3%	-2.7%	4.0	-0.2
New South Wales	36,142,000	12.2%	-7.3%	3.2	-0.1
Victoria	27,970,000	15.6%	-6.0%	2.9	0.0
Other States	25,828,000	9.0%	-3.5%	4.1	-0.1

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

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

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

Annual change in visitor expenditure by state Year ending September 2023



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.

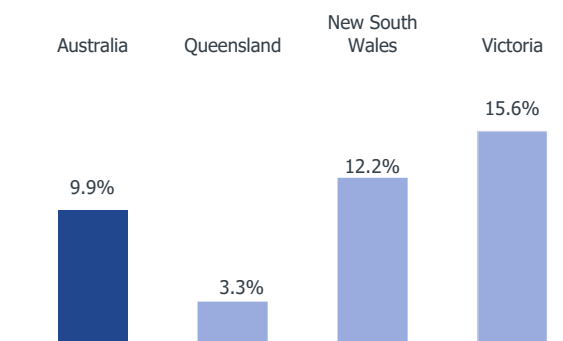
In 2019, TRA transitioned to 100 per cent mobile phone interviewing, after previously doing 50 per cent of the sample from landlines. 97 per cent of the Australian population aged 15 years or more owning a mobile phone. This change will improve the accuracy of national, state and territory estimates.

Please visit tra.gov.au for more information on the methodology, back-casting process and impact on results.

Disclaimer:

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Annual change in visitation by state, Year ending September 2023



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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Year-ending September 2023 – International Snapshot

Methodology update due to COVID-19 border closures:

- Usually, the IVS produces international visitation estimates using a combination of airport interviews, immigration data taken from visa applications/passports, previous travel records and sampled incoming passenger cards.
- Tourism Research Australia imputed IVS estimates from the March quarter 2020 to June quarter 2022. This was due to COVID-19 related international border closures and insufficient sample size of interviews. The IVS estimates for September quarter 2022 and December quarter 2022 were based on a combination of interview data and imputation.
- The IVS estimates for the March, June and September quarters 2023 are based on 100% interview data. As a result, the year ending September 2023 IVS results are based on a combination of imputation and interview data.
- Given some data is imputed, TRA recommends reporting data by purpose only at the national level, while stopover by market can be released at the state level for periods using imputed data including the year ending September 2023. The year ending September 2023 data includes three months of imputed data, i.e. October – December 2022, and nine months' results based on survey results i.e. January – September 2023. The results for January – September 2023 can be reported by purpose at the state level and visitation at the regional level when sample sizes meet the publishable levels.**

Please see [International Visitor Survey \(IVS\) methodology](#) | [Tourism Research Australia](#) for more information.

Queensland and Australia – Year ending September 2023

- In the year ending September 2023, total international overnight visitor expenditure (OVE) to Queensland was **\$5.2 billion**, down by 13.9 per cent (or \$847.8 million) compared to pre-COVID (i.e. year ending December 2019). Queensland slightly outperformed the national average in OVE recovery (OVE at the national level OVE was down by 18.4 per cent).

	Total \$m	Annual % change	3yr trend	Change since 2019	Total visitors	Annual % change	3yr trend	Change since 2019
Queensland	\$5,234.8m	286.4%	50.0%	-13.9%	1,785,000	243.5%	28.0%	-35.9%
New South Wales	\$10,226.9m	184.3%	56.5%	-10.1%	3,114,000	229.1%	33.7%	-29.0%
Victoria	\$5,648.5m	126.3%	17.4%	-36.0%	1,856,000	198.5%	16.5%	-40.9%
Western Australia	\$2,200.4m	262.0%	60.1%	-7.7%	740,000	240.1%	29.9%	-25.7%
South Australia	\$1,218.0m	296.9%	61.9%	1.0%	407,000	328.1%	39.7%	-16.5%
ACT	\$416.8m	np	np	-26.3%	170,000	225.7%	33.1%	-37.1%
Northern Territory	\$395.2m	268.0%	52.7%	-9.5%	180,000	310.5%	20.8%	-39.6%
Tasmania	\$314.7m	246.2%	0.1%	-43.3%	185,000	415.1%	12.7%	-34.6%
Australia	\$25,655.8m	193.0%	43.2%	-18.4%	6,111,000	197.9%	31.0%	-29.8%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

- The top five source markets by **visitation to Queensland** in the year ending September 2023 were mostly similar to Australia with the exception of **Japan** being one of the top five markets for Queensland, and China being one of the top five markets for Australia. Queensland's top five markets were **New Zealand** (413,000 or 23 per cent of total international visitation to Queensland), **the United Kingdom** (191,000 or 11 per cent), **the USA** (162,000 or 9 per cent), **Japan** (100,000, or 6 per cent) and **India** (69,000, or 4 per cent).

Year-ending September 2023 – International Snapshot

Year ending September 2023 top 20 visitation by source market

	Queensland		Australia	
	Total Visitors	Change since 2019	Total visitors	Change since 2019
NZ	413,000	-15.6%	1,076,000	-17.2%
UK	191,000	-12.5%	553,000	-17.6%
USA	162,000	-31.3%	576,000	-24.9%
Japan	100,000	-54.5%	223,000	-51.2%
India	69,000	-16.3%	365,000	-3.1%
China	62,000	-87.5%	387,000	-70.8%
Canada	59,000	-11.0%	138,000	-22.5%
Germany	58,000	-28.4%	135,000	-31.8%
Korea	56,000	-24.3%	210,000	-17.3%
Singapore	41,000	-41.4%	312,000	-25.1%
France	32,000	-34.0%	99,000	-27.2%
Scandinavia	30,000	-26.4%	73,000	-29.2%
Thailand	29,000	53.1%	89,000	-5.9%
Indonesia	29,000	0.2%	169,000	-14.4%
Malaysia	25,000	-45.2%	152,000	-55.7%
Hong Kong	24,000	-63.9%	142,000	-50.0%
Taiwan	21,000	-73.4%	93,000	-47.5%
Netherlands	20,000	-21.5%	46,000	-25.8%
Italy	18,000	-31.1%	56,000	-22.3%
Switzerland	14,000	-8.9%	35,000	-30.3%
Other Asia	79,000	15.9%	465,000	7.0%
Other Europe	68,000	-27.9%	220,000	-16.4%
Other Countries	183,000	-3.1%	495,000	-8.8%
Total	1,785,000	-35.9%	6,111,000	-29.8%

*Change vs 2019 refers to Year Ending December 2019
Yellow highlights indicate a record.

Queensland and Australia – September Quarter 2023

- **In the September quarter 2023**, Queensland welcomed 518,000 international visitors, down 27.0 per cent compared to the September quarter 2019. Total international OVE in Queensland was \$1.6 billion, which was steady (down 0.6 per cent) compared to the September quarter 2019.
- In the September quarter 2023, Queensland welcomed 290,000 international holiday visitors, down by 37.1 per cent compared to the September quarter 2019. These holiday visitors generated \$629.6 million OVE in Queensland, down by 14.9 per cent compared to the September quarter 2019. Holiday visitors tended to stay longer with Average Length of Stay (ALoS) of 15.7 nights, up by 2.4 nights from 13.3 nights in the September quarter 2019. These holiday visitors spent on average \$2,168 per visitor, up 35.2 per cent compared with the September quarter 2019 with an average spend of \$138 per night (up 14.6 per cent compared to September 2019).

Quarterly overnight visitor expenditure by purpose

	Queensland			Australia		
	Sep 2023	Sep 2019	Change since 2019	Sep 2023	Sep 2019	Change since 2019
Holiday	\$629.6m	\$740.0m	-14.9%	\$2,182.0m	\$2,438.0m	-10.5%
VFR	\$244.3m	\$205.8m	18.7%	\$1,225.5m	\$1,012.3m	21.1%
Business	\$157.3m	\$89.0m	76.6%	\$555.5m	\$521.2m	6.6%
Employment	\$96.9m	\$69.0m	40.4%	\$472.2m	\$366.5m	28.8%
Education	\$423.3m	\$485.5m	-12.8%	\$3,305.3m	\$3,624.2m	-8.8%
Other	\$39.7m	\$11.6m	241.7%	\$99.7m	\$94.2m	5.8%
Total	\$1,591.0m	\$1,600.9m	-0.6%	\$7,840.1m	\$8,056.4m	-2.7%

Year-ending September 2023 – International Snapshot

Quarterly visitation by purpose

	Queensland			Australia		
	Jun 2023	Jun 2019	Change since 2019	Jun 2023	Jun 2019	Change since 2019
Holiday	240,000	386,000	-37.8%	691,000	979,000	-29.4%
VFR	178,000	179,000	-0.5%	698,000	743,000	-6.1%
Business	41,000	50,000	-18.3%	189,000	240,000	-21.4%
Employment	14,000	11,000	24.5%	57,000	52,000	9.9%
Education	13,000	20,000	-35.9%	80,000	101,000	-20.2%
Other	32,000	15,000	111.9%	150,000	154,000	-2.4%
Total	443,000	592,000	-25.2%	1,470,000	1,864,000	-21.2%

- In the September quarter 2023, **Queensland's largest source markets by OVE** were **New Zealand** (\$253.2m, up 11.2 per cent compared to September 2019), **Japan** (\$146.5 million, up 18.0 per cent), **China** (\$134.2 million, down 68.8 per cent), **the United States of America** (\$107.6 million, up 9.0 per cent compared to September 2019) and **the United Kingdom** (\$97.0 million, up 30.0 per cent compared to September 2019).
- Korea and Canada** stand out as international markets where visitation in the September 2023 quarter was higher than September quarter 2019. The increase in visitation corresponds with an increase in aviation capacity from both countries into Brisbane.

Quarterly overnight visitation and expenditure in Queensland, by market

	Overnight Visitor Expenditure			Visitors		
	Sep 2023	Sep 2019	Change since 2019	Sep 2023	Sep 2019	Change since 2019
New Zealand	\$253.2m	\$227.8m	11.2%	133,000	158,000	-15.8%
United States of America	\$107.6m	\$98.7m	9.0%	45,000	53,000	-15.4%
Japan	\$146.5m	\$124.2m	18.0%	45,000	63,000	-29.0%
United Kingdom	\$97.0m	\$74.6m	30.0%	38,000	42,000	-9.5%
Korea	\$71.3m	\$50.7m	40.7%	28,000	17,000	65.9%
China	\$134.2m	\$429.3m	-68.8%	27,000	116,000	-76.4%
India	\$37.2m	\$32.4m	15.0%	16,000	17,000	-4.6%
Canada	\$78.2m	\$34.7m	125.2%	15,000	13,000	16.5%
Germany	\$39.5m	\$41.8m	-5.6%	15,000	19,000	-21.8%
Singapore	\$53.1m	\$39.7m	33.8%	10,000	20,000	-51.9%
France	\$33.3m	\$24.8m	34.3%	9,000	15,000	-44.2%
Indonesia	\$21.0m	np	np	8,000	np	np
Malaysia	\$35.9m	\$21.5m	67.0%	7,000	12,000	-45.1%
Taiwan	np	\$48.1m	np	np	20,000	np
Hong Kong	np	\$54.0m	np	np	20,000	np
Scandinavia	np	np	np	np	np	np
Netherlands	np	\$13.7m	np	np	7,000	np
Thailand	np	np	np	np	np	np
Italy	np	\$22.6m	np	np	9,000	np
Switzerland	np	np	np	np	np	np
Other Asia	\$57.5m	\$33.9m	69.5%	20,000	16,000	24.2%
Other Europe	\$51.5m	\$59.8m	-13.9%	19,000	22,000	-14.6%
Other Countries	\$225.9m	\$106.8m	111.5%	46,000	49,000	-6.6%
Total International	\$1,591.0m	\$1,600.9m	-0.6%	518,000	710,000	-27.0%

Year-ending September 2023 – International Snapshot

Regional Visitation – First Nine Months 2023 (Jan-September 2023)

- When it comes to regional performance, **Brisbane** had the largest share of the Queensland's international visitors in the first nine months of 2023 (812,000, 76.8 per cent of visitor numbers in the first nine months of 2019), followed by **Gold Coast** (436,000 visitors, 56.1 per cent of what it was in the first nine months of 2019) and **Tropical North Queensland** (313,000 visitors, 54.2 per cent of what it was in the first nine months of 2019).
- Sunshine Coast** (down 7.8 per cent) and **Townsville** (down 6.0 per cent) were the regions closest to 2019 levels of international visitation.

Total International nine months overnight visitation and nights, By Region

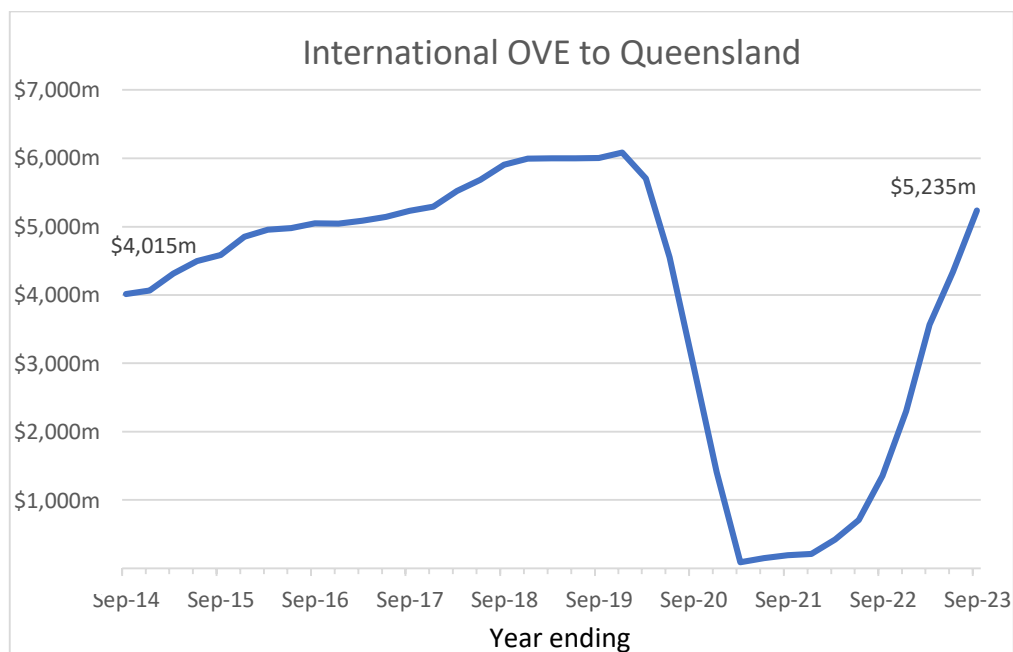
	Visitors			Nights		
	Jan - Sep 2023	Jan - Sep 2019	Change since 2019	Jan - Sep 2023	Jan - Sep 2019	Change since 2019
Brisbane	812,000	1,058,000	-23.2%	17,907,000	20,753,000	-13.7%
Gold Coast	436,000	777,000	-43.9%	6,424,000	7,610,000	-15.6%
TNQ	313,000	577,000	-45.8%	3,747,000	5,019,000	-25.3%
Sunshine Coast	217,000	235,000	-7.8%	3,442,000	2,114,000	62.8%
Whitsundays	102,000	152,000	-32.7%	838,000	954,000	-12.2%
Townsville	83,000	89,000	-6.0%	952,000	880,000	8.2%
SGBR	68,000	101,000	-32.6%	1,441,000	1,586,000	-9.2%
Fraser Coast	55,000	91,000	-38.9%	280,000	495,000	-43.4%
Queensland	1,381,000	2,002,000	-31.0%	37,158,000	41,481,000	-10.4%

Holiday International nine months overnight visitation and nights, By Region

	Visitors			Nights		
	Jan - Sep 2023	Jan - Sep 2019	Change since 2019	Jan - Sep 2023	Jan - Sep 2019	Change since 2019
Brisbane	320,000	538,000	-40.6%	3,635,000	5,111,000	-28.9%
Gold Coast	290,000	607,000	-52.2%	2,247,000	3,421,000	-34.3%
TNQ	265,000	533,000	-50.3%	2,546,000	3,943,000	-35.4%
Sunshine Coast	145,000	178,000	-18.3%	931,000	1,090,000	-14.6%
Whitsundays	96,000	146,000	-34.7%	641,000	756,000	-15.2%
Townsville	62,000	71,000	-12.8%	291,000	489,000	-40.5%
SGBR	45,000	78,000	-42.1%	833,000	837,000	-0.5%
Fraser Coast	50,000	80,000	-38.2%	174,000	246,000	-29.1%
Queensland	761,000	1,325,000	-42.5%	11,814,000	16,652,000	-29.1%

Attachment 5: 10-Year View - Queensland visitation and expenditure

Graph 1.

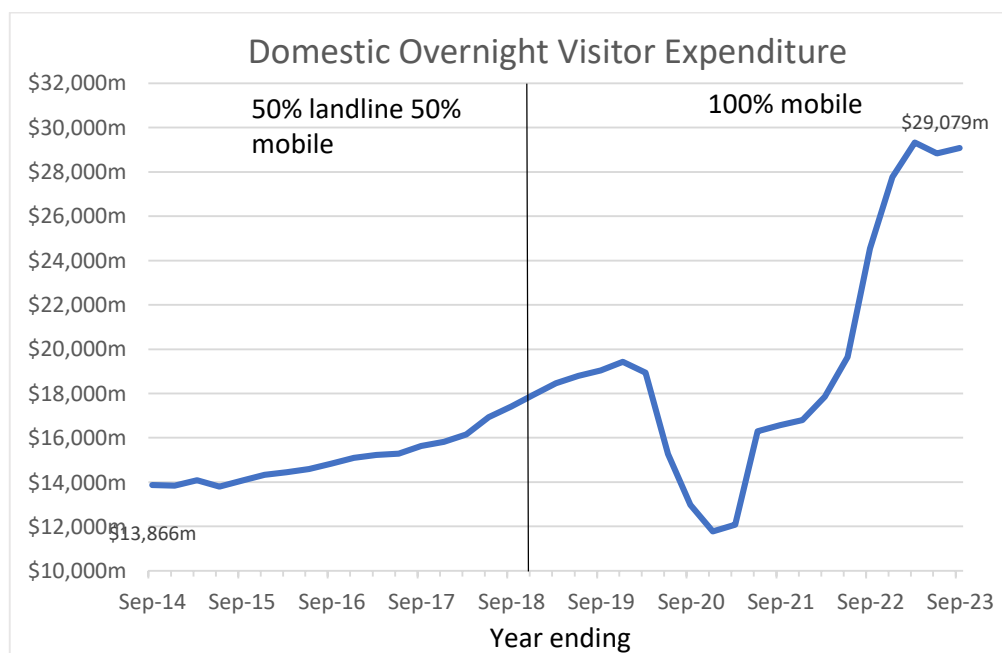


Graph 2.

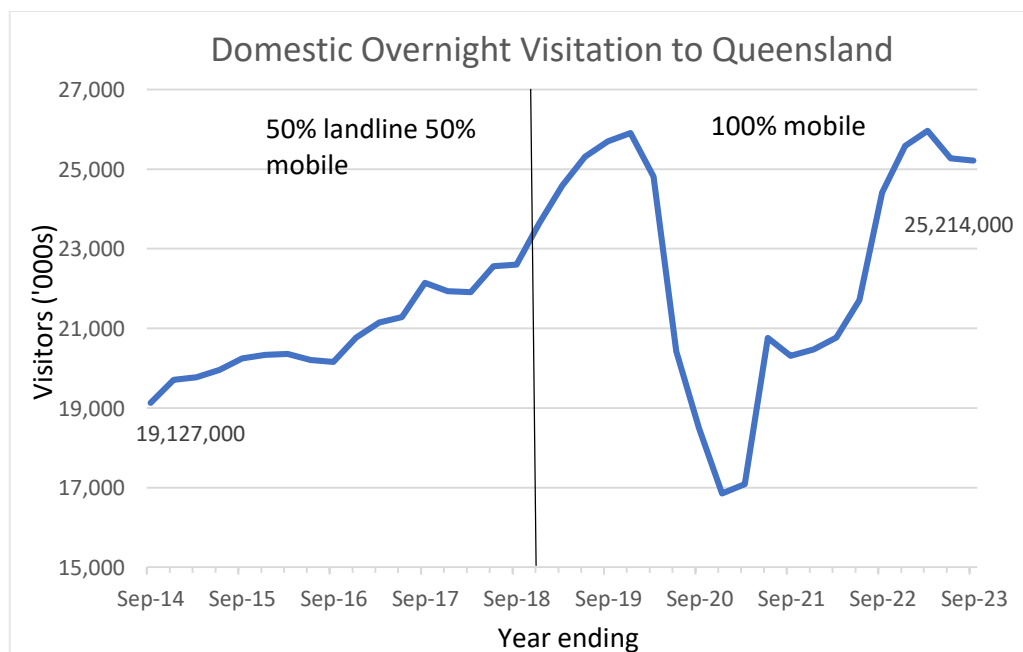


1. Graphs 1 and 2 shows that in the year ending March 2021 international visitation and OVE experienced its largest drop since the beginning of the IVS survey. The year ending September 2023 data has been the seventh quarter of improvement since the borders reopened in January 2022.

Graph 3.



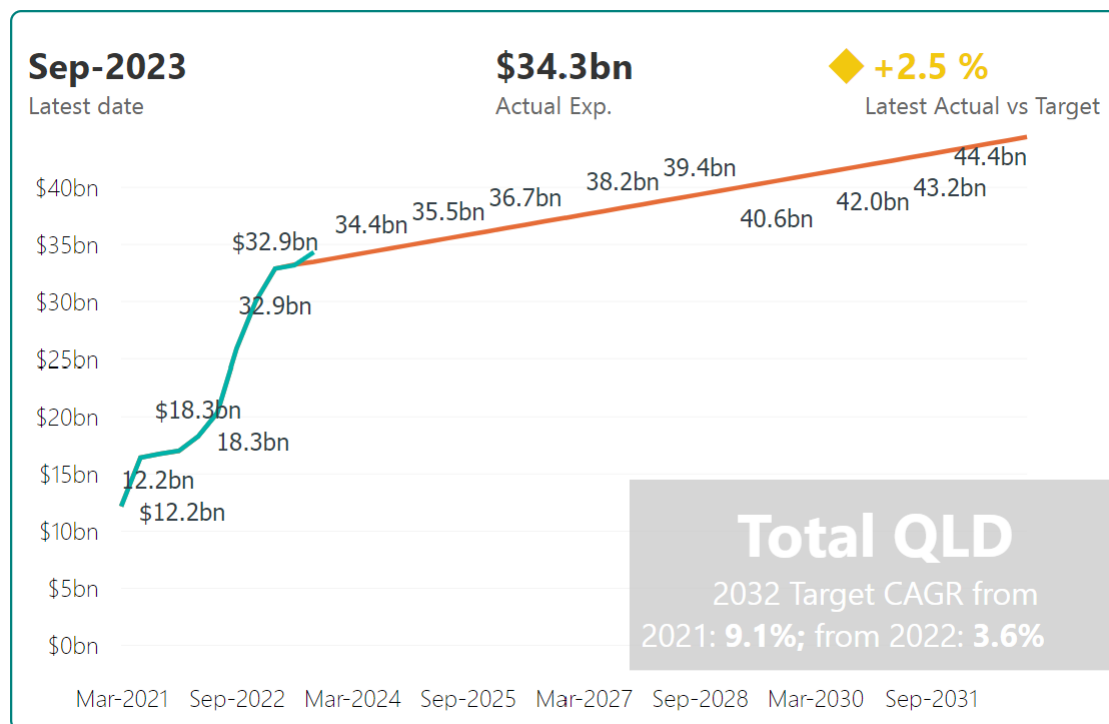
Graph 4.



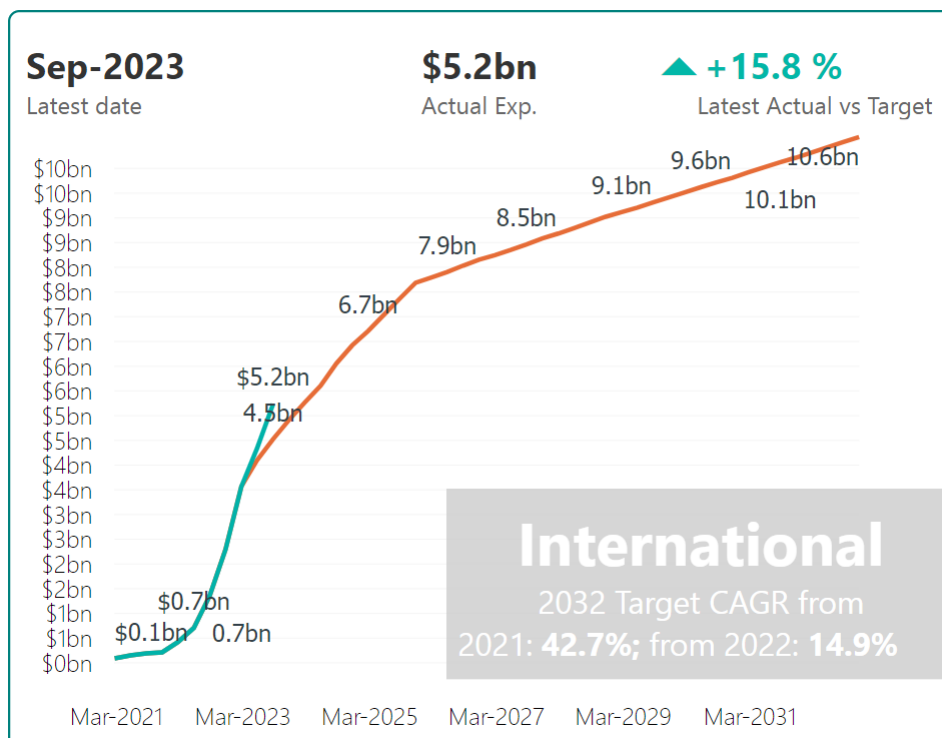
2. Graphs 3 shows that domestic visitation has ticked down for the second quarter in a row after almost two years of growth and exceeding pre-COVID 19 levels. Graph 4 shows that this has also caused domestic overnight visitor expenditure to flatten over the past two quarters.

Attachment 6: Queensland OVE vs TT32 Target

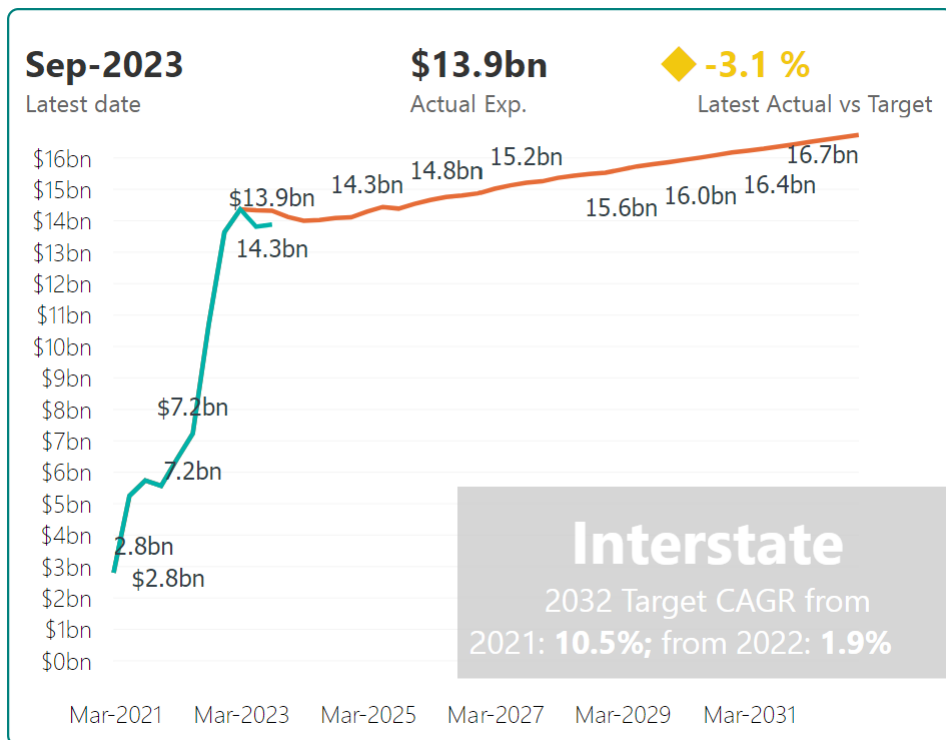
Graph 1. Total OVE



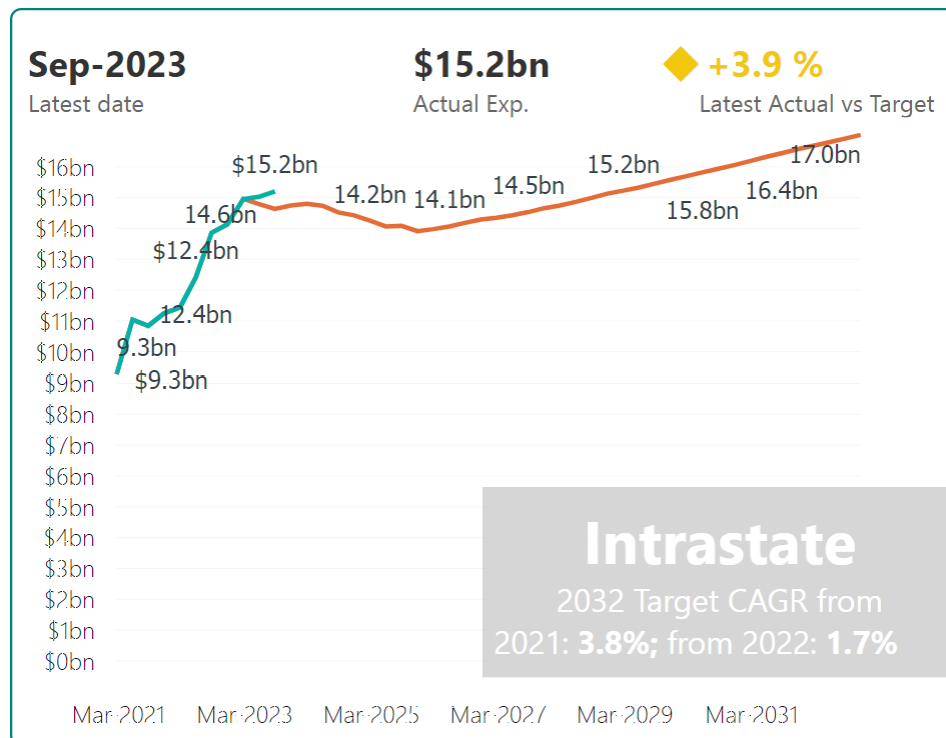
Graph 2. International OVE



Graph 3. Interstate OVE



Graph 4. Intrastate OVE



Minister for Tourism and Sport

BRIEFING NOTE

SUBJECT: National and International Visitor Surveys for the year ending December 2023

RECOMMENDATION(S):

It is recommended the Minister:

- **note** that Tourism Research Australia is expected to release its National Visitor Survey (NVS) and International Visitor Survey (IVS) results for the year ending December 2023, at **12:01am AEDT on Wednesday 27 March 2024**. The data is under strict embargo until this time.
- **note** the key results summarised below:
 - o Queensland reached a combined \$34.0 billion in total Overnight Visitor Expenditure (OVE), which includes \$28.3 billion in domestic OVE and \$5.7 billion in international OVE.
 - o Queensland continues to maintain the leading position in the domestic holiday market, holding 28.1 per cent of the market share (down 1.9 percentage points over the year).
 - o Queensland's domestic holiday OVE was \$14.9 billion, a decrease of 5.7 per cent over the year. The decline represents the impact of the rising cost of living, the slowdown of the Australian economy and the increase in outbound travel in 2023, following the domestic post-COVID-19 travel boom.
 - o OVE generated from domestic business travel reached a record \$5.1 billion. This is the fifth consecutive business OVE record for Queensland. This is despite business visitation still being below 2019 levels.
 - o Queensland outperformed the national average in international OVE recovery. International OVE in Queensland reached 94.4 per cent of its 2019 levels at \$5.7 billion. There were record levels of OVE from New Zealand, Canada, Thailand and Indonesia.
 - o Queensland's total OVE is on track with its progressive Towards Tourism 2032 (TT32) target for year ending 2032 (\$34.0 billion vs \$33.8 billion). International OVE is 17.0 per cent ahead of its target and intrastate OVE is 2.5 per cent ahead of its target. However, interstate OVE is 6.6 per cent below its target.

Minister's Comments:

☐ **NOTED**

☐ **FURTHER INFORMATION REQUIRED**

Hon. Michael Healy MP
 Minister for Tourism and Sport

Date:

☐ **ENDORSED**

Ross MacLeod
 A/Chief of Staff

Date:

BACKGROUND:

1. TRA is expected to release the NVS and IVS results for the year ending December 2023 at 12:01am AEDT on 27 March 2024.
2. Usually, the IVS produces international visitation estimates using a combination of airport interviews, immigration data taken from visa applications/passports, previous travel records and sampled incoming passenger cards.

Author: Position: Research Specialist Telephone: Date: 21/03/2024	Endorsed by: Position: Corporate Affairs Director Telephone: Date: 22/03/2024	Endorsed by: Position: Group Exec Corporate and Strategy Telephone: Date: 22/03/2024
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3. The IVS estimates for the year ending December 2023 is the first full year based on 100 per cent interview data since the year ending December 2019.
4. TRA imputed IVS estimates from the December quarter 2020 to June quarter 2022. This was due to COVID-19 related international border closures and insufficient sample size of interviews. The IVS estimates for the September quarter 2022 and December quarter 2022 were based on a combination of interview data and imputation.
5. An overview is provided in **Attachments 1-4**.

KEY ISSUES:

6. Queensland has the second highest total (domestic plus international) OVE in the nation behind New South Wales, with \$34.0 billion. This includes \$28.3 billion in domestic OVE and \$5.7 billion in international OVE.

DOMESTIC OVERNIGHT VISITOR EXPENDITURE

7. Queensland's total domestic OVE reached \$28.3 billion, up 1.8 per cent year-on-year. Queensland continues to hold its number two position in total domestic OVE market share.
8. Queensland retained its position as the leading state for holiday OVE, achieving \$14.9 billion, down 5.7 per cent over the year. Queensland holds 28.1 per cent in holiday OVE market share (down 1.9ppt over the year), while Victoria (up 1.3ppt to 21.1 per cent), New South Wales (up 0.7 ppt to 27.8 per cent) and Western Australia (up 0.7 ppt to 9.4 per cent) made gains in holiday market share.
9. While business travel is yet to fully recover to the pre-COVID-19 levels, the strong return of business expenditure has continued in Queensland. OVE generated from business travel reached a record \$5.1 billion, up 23.9 per cent year-on-year and up 29.9 per cent compared with 2019. This is the fifth consecutive business OVE record in Queensland.
10. Four regions reached record domestic OVE. They were Brisbane (\$7.3 billion, up 14.1 per cent year-on-year), Southern Queensland Country (\$1.3 billion, up 6.5 per cent), Townsville (\$1.2 billion, up 14.0 per cent), and Mackay (\$830.2 million, up 28.6 per cent over the three-year trend).
11. Record numbers of holiday visitors were achieved for the Sunshine Coast (2.6 million, up 5.1 per cent) and Fraser Coast (469,000, up 18.9 per cent over the three-year trend).
12. The decline in Queensland's holiday OVE market share was predominantly due to a culmination of factors including the decline in interstate visitation to Queensland; strong competition from outbound destinations throughout the post-COVID-19 normalisation process; and impacts of the rising cost of living and the slowdown of the Australian economy. Other factors to note include:
 - a. Key interstate source markets may have opted for an overseas holiday, rather than a holiday in Queensland. In the year ending December 2023, more New South Welshmen and Victorians opted for a holiday in Bali (Indonesia), Japan, Thailand, Fiji, Italy and Vietnam than in 2019.
 - b. Through holiday intentions studies, TEQ understands that despite the high costing of living, consumers still want to travel, but they may cut back on trip spend and frequency.
 - c. The most affected regions were Tropical North Queensland (TNQ) and the Whitsundays. Both regions experienced sharp declines in OVE over the year. During COVID-19, both regions may have been perceived as substitutes for overseas beach destinations such as Bali and Fiji. With built-up consumer confidence for travelling outbound, the latest data shows the continuous decline in holiday nights in these regions.

INTERNATIONAL OVERNIGHT VISITOR EXPENDITURE

13. Queensland outperformed the national average in international OVE recovery. In the year ending December 2023, total international OVE to Queensland reached 94.4 per cent of its 2019 levels at \$5.7 billion. Queensland is well ahead of its progressive target to 2032 (+17 per cent).

14. Queensland followed the national pattern of OVE generated from VFR reached a record \$1.1 billion (up 34.3 per cent since 2019). In addition, OVE generated from business travel also reached a record \$401.1 million (up 37.7 per cent since 2019), as well as another record for OVE generated by employment visitation, achieving \$375.9 million (up 61.2 per cent since 2019).
15. Both OVE generated from holiday visitors and education visitors was around 80 per cent of what they were prior to COVID-19.
16. Queensland held the number three position in total international OVE market share, and held the second position for international holiday OVE, achieving \$2.3 billion in holiday OVE.
17. Queensland reached record levels of OVE from New Zealand, Canada, Thailand and Indonesia.
18. Three regions reached record levels of OVE. They were Brisbane (\$2.9 billion, up 1.7 per cent compared to 2019), Sunshine Coast (\$365.3 million, up 29.3 per cent compared to 2019) and Southern Great Barrier Reef (\$117.8 million, up 19.8 per cent compared to 2019).
19. Despite a number of regional OVE records, international visitation across all regions is still below pre-COVID levels. Sunshine Coast (down 6.7 per cent) and Townsville (down 11.5 per cent) are the closest to pre-COVID-19 levels.
20. The data shows that TNQ (down 43.4 per cent) and Gold Coast (down 43.3 per cent) are recovering at a slower pace than other regions. Pre-COVID-19, around one in four international visitors to Gold Coast and to the TNQ regions were Chinese visitors. With the slow recovery of Chinese outbound travel to Australia, these regions' heavy reliance on the China market may have had an impact on the pace of their international recovery.

COMPARISON WITH TT32

21. A 10-year overview of Queensland visitation and expenditure is provided at **Attachment 5**.
22. Queensland's total OVE is 0.7 per cent ahead of its TT32 target for the year ending 2032 (\$34.0 billion vs \$33.8 billion). International OVE is 17.0 per cent ahead of its target (\$5.7 billion vs \$4.9 billion) and intrastate OVE is 2.5 per cent ahead of its target (\$15.1 billion vs \$14.7 billion). However, interstate OVE is 6.6 per cent below its target (\$13.1 billion vs \$14.1 billion). A comparison of this data to the TT32 targets is provided in **Attachment 6**.
23. Queensland slightly missed the TT32 total domestic OVE progressive target (-2.1 per cent vs target) and were more significant in missing the holiday domestic OVE progressive target (-9.5 per cent vs target).

ELECTION COMMITMENT(S):

24. The Queensland Government's Rebuilding Queensland Tourism election commitment is focussed on fast-tracking tourism recovery and restoring tourism jobs in Queensland. The NVS and IVS results are an important dataset that helps TEQ to track Queensland's recovery.

COMMUNICATIONS STRATEGY:

25. TEQ understands the Minister's Office plan to present a media release with this data to the Courier Mail for coverage on Wednesday 27 March 2024.

ATTACHMENTS:

- Attachment 1 – NVS Executive Summary
- Attachment 2 – IVS Executive Summary
- Attachment 3 – Domestic Tourism Snapshot
- Attachment 4 – International Tourism Snapshot
- Attachment 5 – 10-Year View – Queensland Visitation and Expenditure
- Attachment 6 – Queensland OVE vs TT32 Targets.

Executive Summary – National Visitor Survey

Year ending December 2023

Under strict embargo until 12:01am (AEDT), Wednesday 27th March 2024

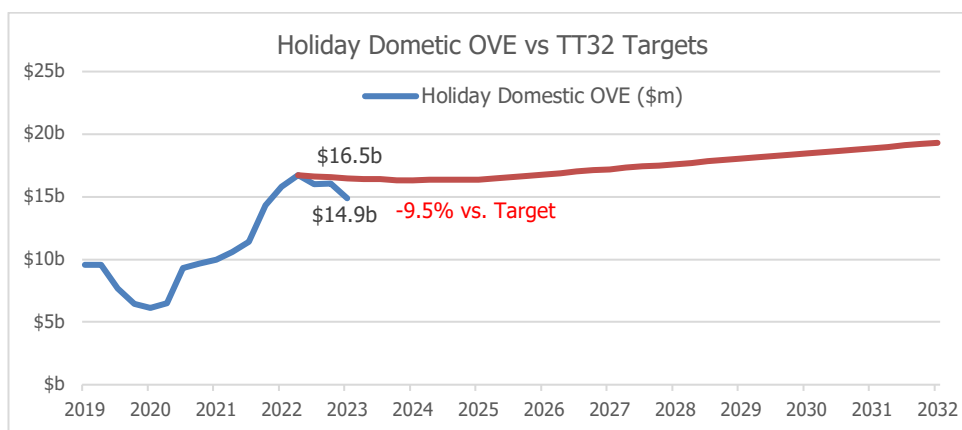
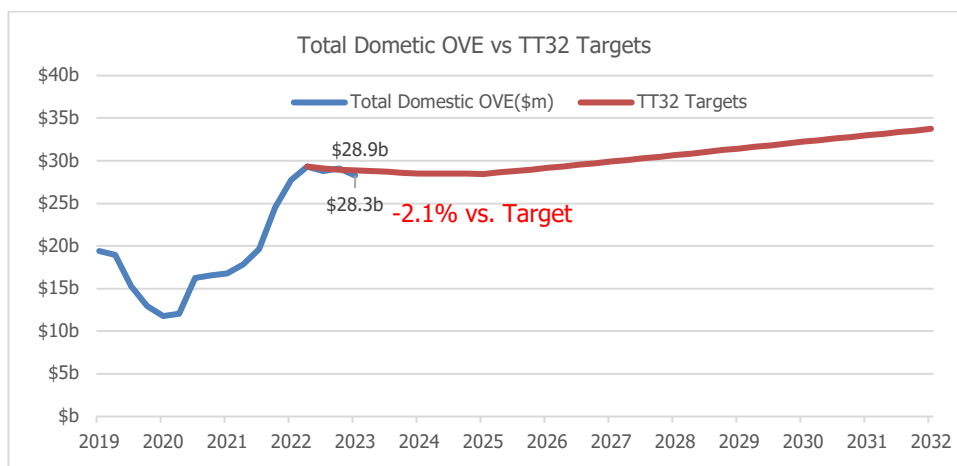
Key highlights:

Queensland's **total domestic overnight visitor expenditure (OVE)** reached \$28.3 billion, up 1.8 per cent YoY. Queensland continues to hold its **number 2 position in total domestic OVE**.

Queensland continues to take the leading position in the domestic holiday market, holding 28.1 per cent in holiday OVE market share (down 1.9ppt over the year), while Victoria (up 1.3ppt to 21.1 per cent), New South Wales (up 0.7 ppt to 27.8 per cent) and Western Australia (up 0.7 ppt to 9.4 per cent) made substantial gains in holiday market share. The decline in Queensland's holiday OVE market share was predominantly **due to the decline in visitation to Queensland, interstate visitation in particular**. It is worth noting that holiday OVE in NSW is less than \$200 million behind us for number 1 holiday OVE state.

Queensland is facing strong competition from outbound destinations throughout the post-COVID normalisation process. We slightly missed the TT32 total domestic OVE progressive target (-2.1% vs target) and were more significant in missing the holiday domestic OVE progressive target (-9.5% vs target).

While business travel is yet to fully recover to the pre-COVID level, the strong return of business travel has continued in Queensland. **OVE generated from business travel** reached a record \$5.1 billion, up 23.9 per cent YoY and up 29.9 per cent compared with 2019. This is **the fifth consecutive business OVE record in Queensland**.



Four regions reached record levels of domestic OVE. They were **Brisbane** (\$7.3 billion, up 14.1 per cent YoY), **Southern Queensland Country** (\$1.3 billion, up 6.5 per cent YoY), **Townsville** (\$1.2 billion, up 14.0 per cent YoY), and **Mackay** (\$830.2 million, up 28.6 per cent over the three year trend).

Record numbers of holiday visitors were reached in **Sunshine Coast** (2.6 million, up 5.1 per cent) and **Fraser Coast** (469,000, up 18.9 per cent over the three year trend).

Executive Summary – National Visitor Survey

Year ending December 2023

Under strict embargo until 12:01am (AEDT), Wednesday 27th March 2024

The decline in holiday OVE over the year for the state is the culmination of headwinds that have been more prominent in recent quarters, which reflect on the impact of the rising cost of living and the slowdown of the economy in Australia.

It is worth noting that in the year ending December 2023, more New South Welshmen and Victorians opted for holiday in Bali (Indonesia), Japan, Thailand, Fiji, Italy and Vietnam than 2019.

Through our holiday intentions studies, we understand consumers still would like to travel, but they may cut back on spend on trips and frequency of trips despite the high costing of living. Our key interstate source markets might have opted for overseas holidays than a holiday in Queensland.

As a result, the most affected regions in Queensland were the **TNQ** and the **Whitsundays** region. Both regions saw sharp declines in OVE over the year. During COVID, both regions might have been perceived as substitutes of overseas beach destinations such as Bali and Fiji. With the built-up consumer confidence of travelling outbound, we saw the continuous decline in holiday nights in the TNQ and Whitsundays.

Comparison of Queensland's OVE

Queensland	Pre-COVID YE December 2019	Now YE December 2023
Proportion of OVE from Domestic visitors vs International visitors	76 per cent vs. 24 per cent	International inbound travel is recovering slowly. 83 per cent vs. 17 per cent
Domestic		
Proportion of OVE from Intrastate visitors vs Interstate visitors	53 per cent vs. 47 per cent	Returned to the Pre-COVID ratio 53 per cent vs. 47 per cent
Proportion of QLD OVE from those travelling for holiday purposes	45 per cent	Still significantly higher than what it was before COVID 53 per cent

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Year ending December 2023

Under strict embargo until 12:01am (AEDT), Wednesday 27th March 2024

Overnight visitor expenditure

	Holiday \$m	Annual % change	3yr trend	Change vs 2019	Total \$m ³	Annual % change	3yr trend	Change vs 2019
Queensland	\$14,906.1m	-5.7%	27.5%	55.6%	\$28,266.0m	1.8%	29.3%	45.4%
New South Wales	\$14,739.6m	3.1%	24.5%	47.7%	\$30,661.9m	7.8%	28.3%	29.5%
Victoria	\$11,197.4m	6.9%	40.0%	48.4%	\$22,840.4m	12.6%	42.5%	34.5%
Western Australia	\$4,986.7m	8.8%	18.5%	55.1%	\$12,072.1m	19.9%	24.5%	41.0%
South Australia	\$2,880.9m	-0.7%	19.9%	27.5%	\$6,606.9m	9.3%	25.7%	26.8%
Tasmania	\$2,303.7m	4.1%	23.7%	31.6%	\$3,777.7m	8.5%	27.1%	34.1%
ACT	\$618.3m	-16.2%	23.1%	23.7%	\$2,597.2m	15.9%	38.3%	39.6%
Northern Territory	\$1,355.9m	-20.4%	30.4%	30.9%	\$2,504.0m	-14.8%	28.9%	16.3%
Australia	\$52,988.6m	0.5%	27.3%	47.7%	\$109,330.9m	8.0%	30.7%	35.5%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

	VFR \$m	Annual % change	3yr trend	Change vs 2019	Business \$m	Annual % change	3yr trend	Change vs 2019
Queensland	\$4,531.9m	-0.8%	28.7%	37.5%	\$5,131.5m	23.9%	36.9%	29.9%
New South Wales	\$5,983.6m	10.7%	30.7%	28.9%	\$5,827.0m	24.0%	35.2%	7.3%
Victoria	\$4,225.7m	12.0%	40.9%	32.9%	\$4,031.9m	29.8%	50.5%	11.6%
Western Australia	\$1,522.2m	1.1%	18.1%	35.6%	\$3,525.4m	52.8%	36.3%	31.7%
South Australia	\$1,262.2m	24.3%	31.4%	41.1%	\$1,417.9m	20.8%	38.6%	22.8%
Tasmania	\$486.5m	25.1%	18.6%	34.9%	\$510.1m	18.7%	43.5%	35.2%
ACT	\$680.1m	9.1%	35.3%	59.0%	\$837.0m	54.9%	55.7%	40.1%
Northern Territory	\$169.5m	-24.5%	25.6%	-5.0%	\$643.8m	-9.1%	27.3%	0.7%
Australia	\$18,861.7m	7.7%	30.8%	33.7%	\$21,924.6m	28.2%	39.0%	18.9%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Overnight visitor expenditure market share

	Holiday OVE share	Annual change	Change Vs 2019	Total OVE share	Annual change	Change Vs 2019
Queensland	28.1%	↓1.9%	↑1.4%	25.9%	↓1.6%	↑1.8%
New South Wales	27.8%	↑0.7%	●0.0%	28.0%	●0.0%	↓1.3%
Victoria	21.1%	↑1.3%	↑0.1%	20.9%	↑0.9%	↓0.1%
Western Australia	9.4%	↑0.7%	↑0.4%	11.0%	↑1.1%	↑0.4%
South Australia	5.4%	↓0.1%	↓0.9%	6.0%	↑0.1%	↓0.4%
Tasmania	4.3%	↑0.1%	↓0.5%	3.5%	●0.0%	●0.0%
ACT	1.2%	↓0.2%	↓0.2%	2.4%	↑0.2%	↑0.1%
Northern Territory	2.6%	↓0.7%	↓0.3%	2.3%	↓0.6%	↓0.4%

*Change vs 2019 refers to Year Ending December 2019

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Overnight visitor trips

	Holiday visitors	Annual % change	3yr trend	Change vs 2019	Total visitors ³	Annual % change	3yr trend	Change vs 2019
Queensland	10,585,000	-4.1%	15.7%	5.8%	24,992,000	-2.3%	12.9%	-3.6%
New South Wales	15,245,000	0.8%	15.8%	3.0%	36,750,000	4.6%	14.7%	-5.7%
Victoria	13,187,000	4.8%	27.3%	5.9%	28,459,000	8.8%	25.0%	-4.3%
Western Australia	4,402,000	-0.4%	6.6%	3.9%	11,074,000	5.2%	7.9%	0.5%
South Australia	3,016,000	-3.1%	6.2%	-8.0%	7,396,000	4.0%	10.3%	-8.6%
Tasmania	1,555,000	-5.6%	9.5%	-8.7%	3,028,000	1.0%	10.9%	-5.9%
ACT	753,000	-12.5%	21.7%	-12.7%	3,298,000	8.7%	25.6%	3.0%
Northern Territory	700,000	-15.3%	14.9%	-6.8%	1,409,000	-10.5%	12.5%	-17.2%
Australia	47,634,000	0.0%	16.0%	3.0%	112,584,000	4.0%	15.2%	-4.1%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

	VFR visitors	Annual % change	3yr trend	Change vs 2019	Business visitors	Annual % change	3yr trend	Change vs 2019
Queensland	7,940,000	-5.2%	10.4%	-11.2%	5,545,000	6.3%	14.2%	-9.5%
New South Wales	13,113,000	8.7%	14.3%	-6.7%	6,889,000	7.5%	15.2%	-17.4%
Victoria	9,757,000	12.9%	23.8%	-5.1%	4,506,000	9.2%	24.2%	-22.5%
Western Australia	2,697,000	-8.6%	4.1%	-6.9%	3,450,000	23.1%	13.3%	0.5%
South Australia	2,410,000	17.5%	15.9%	0.8%	1,638,000	3.7%	14.9%	-10.8%
Tasmania	836,000	16.9%	8.0%	5.2%	519,000	-1.9%	19.2%	-16.0%
ACT	1,275,000	8.3%	21.5%	19.8%	960,000	21.5%	30.9%	-9.6%
Northern Territory	184,000	-11.5%	19.4%	-13.5%	459,000	-7.9%	6.4%	-33.0%
Australia	37,477,000	5.5%	14.5%	-6.2%	23,534,000	9.8%	17.0%	-13.0%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Overnight visitor nights

	Holiday nights	Annual % change	3yr trend	Change vs 2019	Total nights ³	Annual % change	3yr trend	Change since 2019
Queensland	45,039,000	-10.6%	16.6%	3.8%	97,142,000	-8.0%	12.1%	-5.6%
New South Wales	50,699,000	-1.3%	13.0%	0.1%	117,093,000	3.4%	11.8%	-4.5%
Victoria	39,992,000	5.3%	23.7%	11.6%	83,468,000	8.0%	20.6%	-0.1%
Western Australia	18,246,000	-4.2%	6.5%	4.2%	50,138,000	5.5%	7.6%	-0.2%
South Australia	10,478,000	-11.3%	4.5%	-12.7%	25,783,000	-0.4%	8.4%	-7.5%
Tasmania	7,007,000	-7.0%	11.6%	-8.3%	12,590,000	2.7%	8.9%	-1.8%
ACT	1,880,000	-10.7%	22.5%	1.5%	9,263,000	12.5%	24.3%	6.0%
Northern Territory	3,242,000	-33.5%	17.3%	-21.7%	6,939,000	-28.5%	9.2%	-24.6%
Australia	176,587,000	-4.6%	14.7%	2.1%	402,447,000	0.7%	12.8%	-3.7%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

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	VFR nights	Annual % change	3yr trend	Change vs 2019*	Business nights	Annual % change	3yr trend	Change vs 2019*
Queensland	27,411,000	-11.4%	10.8%	-10.9%	18,760,000	-3.6%	6.4%	-17.3%
New South Wales	40,400,000	7.2%	14.7%	-2.4%	19,910,000	7.7%	9.9%	-13.2%
Victoria	26,576,000	9.9%	19.4%	-6.0%	13,010,000	12.4%	24.8%	-11.5%
Western Australia	9,364,000	-7.4%	5.4%	-12.4%	19,823,000	21.2%	10.2%	-0.3%
South Australia	8,504,000	20.9%	15.4%	11.9%	5,805,000	8.4%	15.2%	2.1%
Tasmania	2,953,000	13.8%	-1.3%	-2.0%	2,019,000	35.8%	21.1%	23.1%
ACT	3,991,000	13.0%	21.0%	23.5%	2,549,000	40.8%	32.6%	-13.3%
Northern Territory	840,000	-33.8%	10.1%	-44.3%	2,444,000	-22.8%	0.8%	-22.9%
Australia	120,040,000	2.3%	13.5%	-5.1%	84,319,000	8.5%	11.6%	-10.0%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Notes:

1. State visitation does not add to the Australian total as some visitors will make stopovers in more than one state.
2. "Total visitors" includes holiday, visiting friends or relatives (VFR), business, and other reasons for visiting.

For the year ending 31 December 2023, we are comparing the period of 1 January 2023 – 31 December 2023 with the period of 1 January 2022 – 31 December 2022. This makes it the first time where the comparison year has not been affected by travel restrictions directly related to Queensland (NB: Western Australia's border restrictions remained in place until 3 March 2022).

National results

- Domestic overnight visitor expenditure (OVE) within Australia reached a record \$109.3 billion (up 8.0 per cent YoY) in the year ending December 2023. This was primarily due to strong growth in OVE generated from business, and to a lesser extent visiting friends and relatives (VFR), which both reached record levels.

In the YE December 2023, Victoria, Western Australia, South Australia and ACT reached records in domestic OVE.

- Queensland continues to hold its number 2 position in total domestic OVE, reaching \$28.3 billion in the YE December 2023, up 1.8% year on year.

New South Wales maintained its number 1 position in total domestic OVE, reaching \$30.7 billion in the YE December 2023, up 7.8% year on year.

- Domestic overnight visitation within Australia was 112.6 million trips (up 4.0 per cent YoY). The number of trips made in 2023 was slightly less than what it was pre-COVID (down 4.1 per cent).

On average, every Australian aged 15 years and over took around 5.1 overnight trips within Australia in the year ending December 2023.

Only holiday visitation has exceeded pre-COVID levels, achieving 47.6 million trips, up 3.0 per cent compared to 2019. Visitation for other purposes, i.e. VFR and Business visitations, is yet to recover to the pre-COVID levels.

It is also interesting to note that holiday visitation was flat comparing with the year prior with 0.0 per cent change. The strongest growth in visitation by purpose over the year was business travel (23.5 million trips, up 9.8 per cent YoY) and VFR travel (37.5 million trips, up 5.5 per cent YoY).

It is worth noting that Victoria reached a record holiday visitation, and interstate holiday visitors to Victoria contributed to their strong growth (reaching a record 3.0 million visitors, up 19.7 per cent over the year).

Queensland results

- Queensland continued to hold its position as the leading state in holiday OVE, reaching \$14.9 billion, however, this was down 5.7 per cent year on year as travel began to normalise following the post-COVID-19 domestic holiday boom. Queensland welcomed 25.0 million domestic visitors in the year ending December 2023, which is slightly down over the year (down 2.3 per cent) and down 3.6 per cent compared to the period before COVID-19.

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- Holiday trips to Queensland were down 4.1 per cent year on year, but remained 5.8 per cent up on pre-COVID levels. These holiday visitors stayed 45.0 million holiday nights, down 10.6 per cent YoY, but up 3.8 per cent compared with 2019.
- While business travel is yet to fully recover to the pre-COVID level, the strong return of business travel has continued in Queensland. OVE generated from business travel reached a record \$5.1 billion, up 23.9 per cent YoY and up 29.9 per cent compared with 2019. This is the fifth consecutive business OVE record in Queensland.
- It seems that the average length of stay (ALoS) is 'normalising' to what it was before COVID, for holiday visitors in particular.

Average Length of Stay			
Year ending December			
	2023	2022	2019
Total	3.9	4.1	4.0
Holiday	4.3	4.6	4.3
VFR	3.5	3.7	3.4
Business	3.4	3.7	3.7
Intrastate	3.1	3.2	3.3
Holiday	3.1	3.3	3.1
VFR	2.5	2.8	2.7
Business	3.4	3.7	4.0
Interstate	5.8	6.0	5.5
Holiday	6.7	6.9	6.8
VFR	5.7	5.9	5.4
Business	3.4	3.7	3.1

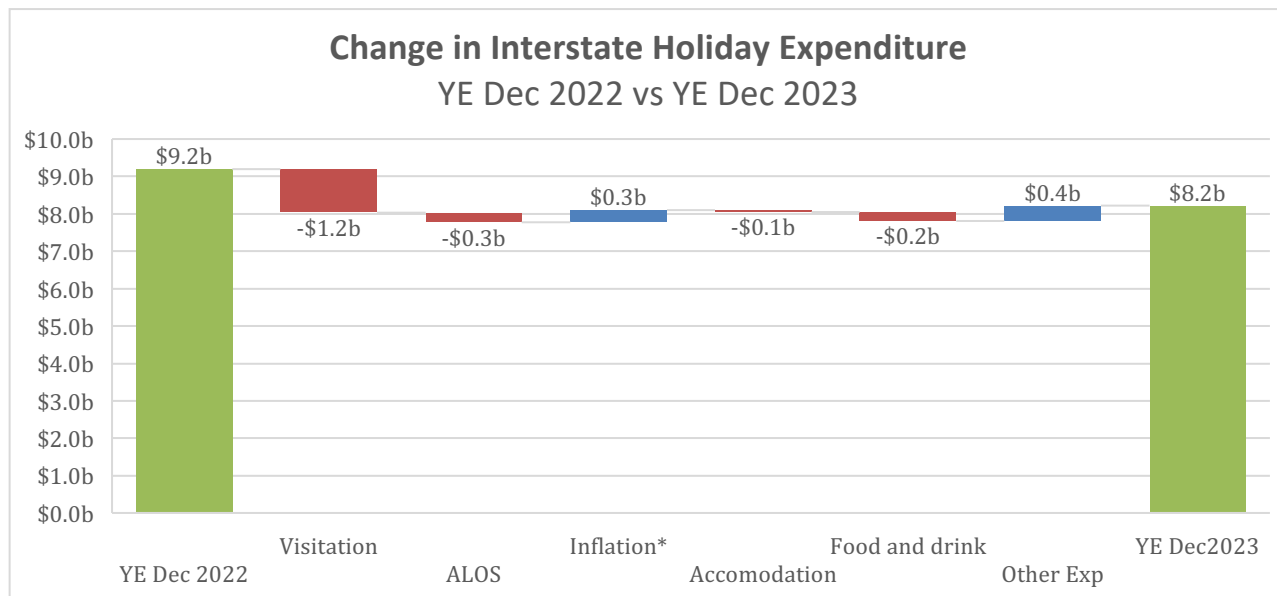
Source: NVS

- Queensland continues to take the leading position in the domestic holiday market, holding 28.1 per cent of domestic holiday OVE, however, the state's market share slipped 1.9ppt over the year, while remaining 1.4ppt above 2019 levels. Victoria (up 1.3ppt to 21.1 per cent), New South Wales (up 0.7 ppt to 27.8 per cent) and Western Australia (up 0.7 ppt to 9.4 per cent) made substantial gains in holiday market share. New South Wales holiday OVE market share is now on par with 2019 levels (0.0ppt change), while VIC is up slightly (0.1ppt) and Western Australia is up 0.4ppt on 2019.
- The decline in Queensland's holiday OVE market share was predominantly due to the decline in visitation to Queensland. Inflation counteracted some of this decrease in OVE.

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*Inflation based on Brisbane CPI

Source: NVS and ABS

- It is also worth noting that OVE generated from intrastate travel continued to grow over the year, increasing 7.0 per cent to \$15.1 billion. The growth was predominantly driven by record intrastate business OVE (\$2.9 billion, up 27.2 per cent YoY). Intrastate holiday OVE also grew slightly (up 1.2 per cent to \$6.7 billion)
- Interstate OVE was down 3.6 per cent to \$13.1 billion, led by a decline of 10.8 per cent in interstate holiday OVE to \$8.2 billion. The overall interstate decline occurred despite record OVE generated from interstate VFR and interstate business travel (NB: Interstate VFR OVE reached a record \$2.9 billion, up 27.2 per cent YoY, and interstate business OVE reached a record \$2.3 billion, up 18.1 per cent YoY).

Queensland intrastate and interstate performance

	Total \$m ³	Annual % change	3yr trend	Change vs 2019*	Market share	Holiday \$m	Annual % change	3yr trend	Change vs 2019*	Market share
Intrastate	\$15,117.1m	7.0%	18.1%	48.0%	53.5% (↑2.6%)	\$6,692.8m	1.2%	12.8%	61.1%	44.9% (↑3.1%)
Interstate	\$13,148.9m	-3.6%	46.5%	42.5%	46.5% (↓2.6%)	\$8,213.4m	-10.8%	45.0%	51.4%	55.1% (↓3.1%)
Total Domestic	\$28,266.0m	1.8%	29.3%	45.4%	100%	\$14,906.1m	-5.7%	27.5%	55.6%	100%

- *Change vs 2019 refers to Year Ending December 2019

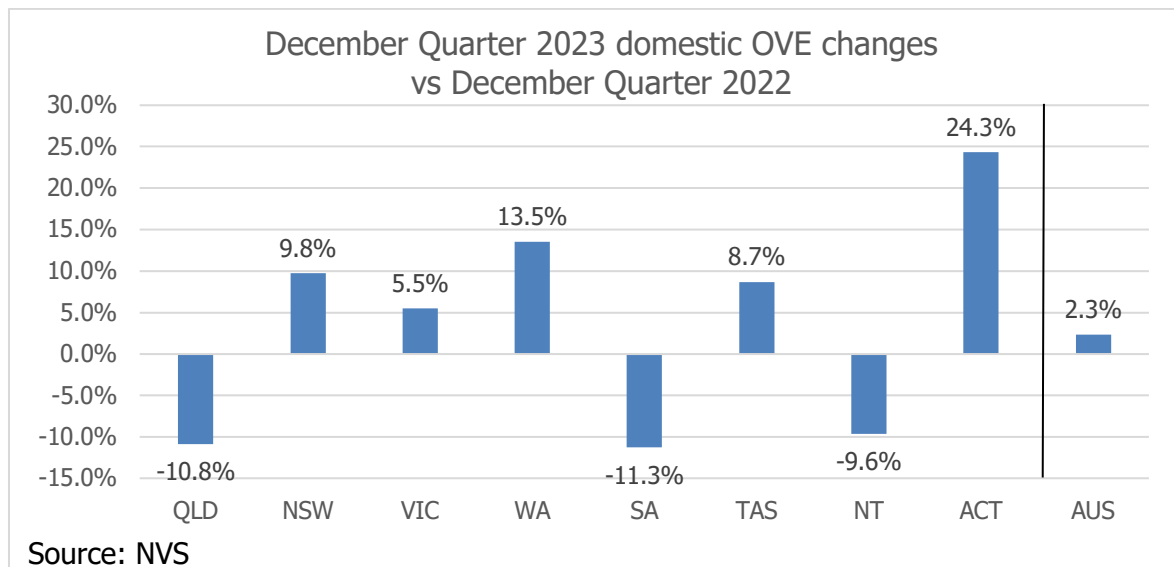
December Quarter 2023 Deep Dive

- Nationally OVE was up 2.3 per cent in the December quarter 2023 compared to the December quarter 2022. OVE grew in NSW, VIC, WA, TAS and ACT over the year. OVE in Queensland was down by 10.8 per cent year on year though, followed by South Australia (down 11.3 per cent).

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- In the December 2023 quarter, the decline in visitation (down by 3.4% year on year) and a decline in ALoS (down by 0.3 nights to 3.5 nights) were the cause of decline in OVE.
- The decrease in Queensland's domestic OVE in the December quarter 2023 largely reflects a slowdown in the interstate market, with visitation down 9.8 per cent and spend down 20.4 per cent YoY. Intrastate visitation was steady (down 0.5 per cent) and intrastate spend was down slightly (2.2 per cent).

	Visitation			Overnight Visitation Expenditure		
	Dec 2023	Dec 2022	Change over the Year	Dec 2023	Dec 2022	Change over the Year
Interstate	1,845,000	2,045,000	-9.8%	\$2,776.0m	\$3,486.0m	-20.4%
Intrastate	4,388,000	4,411,000	-0.5%	\$3,771.5m	\$3,856.5m	-2.2%
Total	6,233,000	6,455,000	-3.4%	\$6,547.5m	\$7,342.5m	-10.8%

*Change compared to the December quarter 2019

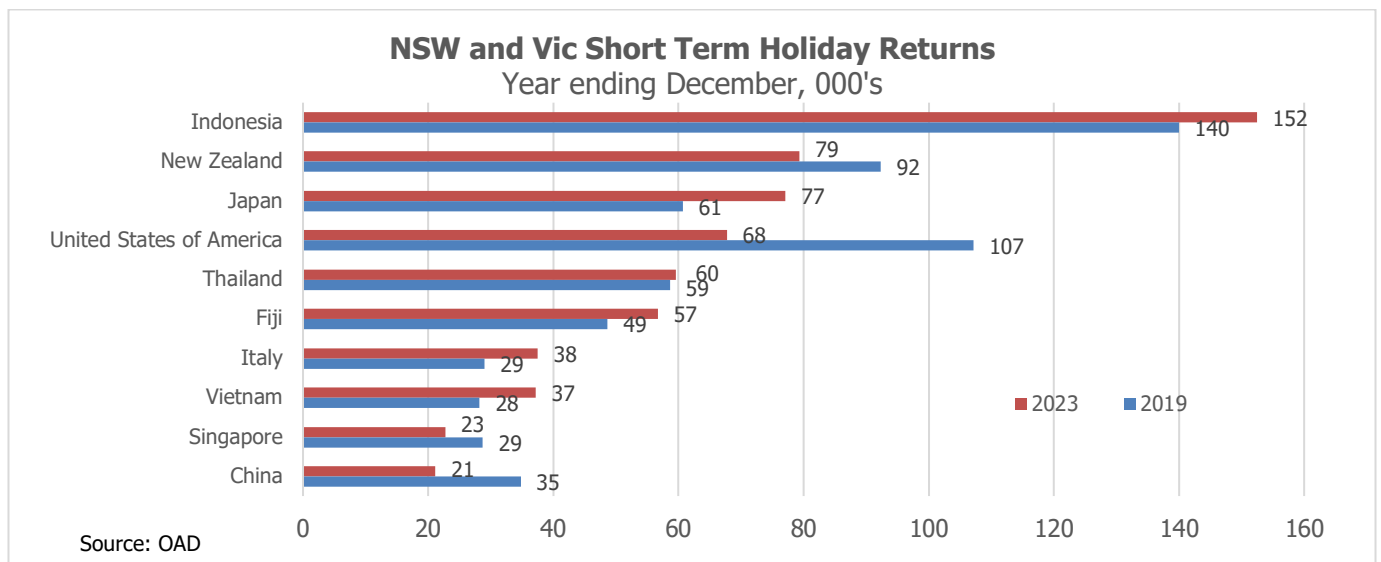
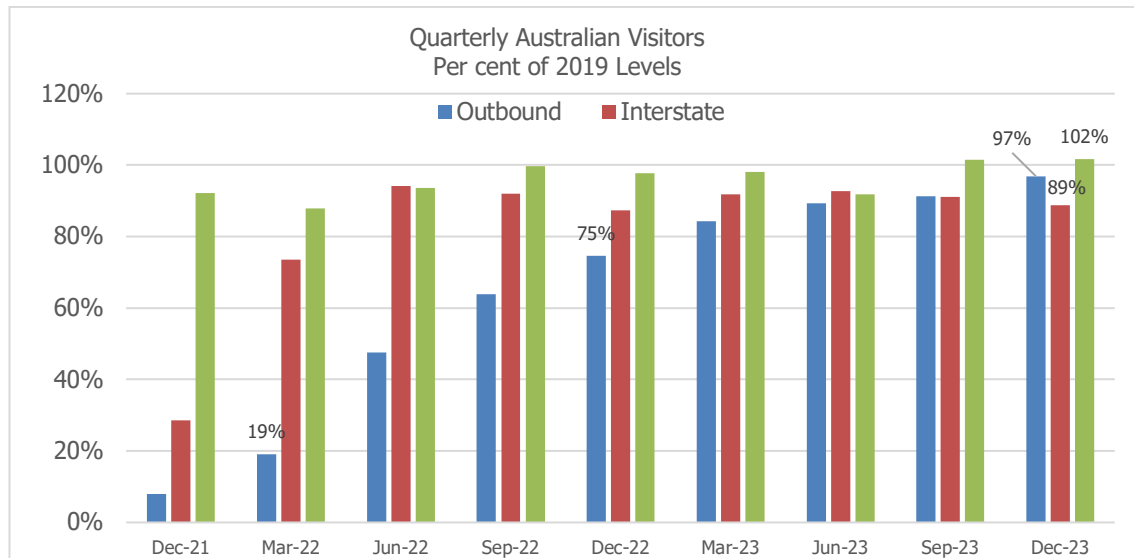
Headwinds are more prominent in recent quarters which reflect on the impact of rising cost of living and the slowdown of the economy in Australia

- At the national level, since the Australian border reopening in January 2022, we continued to see strong recovery of outbound travel. Outbound travel is close to full recovery in the December quarter 2023, and intrastate travel exceeded the pre-COVID level in the December 2023 quarter.
- On the other hand, interstate travel reached its peak in the June 2022 quarter at 94 per cent of the pre-COVID levels and has tapering off since then.
- It is worth noting that more New South Welshmen and Victorians opted for holiday in Bali (Indonesia), Japan, Thailand, Fiji, Italy and Vietnam than 2019.
- Through our holiday intentions studies, we understand consumers still would like to travel, but they may cut back on spend on trips and frequency of trips despite the high costing of living. Our key interstate source markets might have opted for overseas holidays than a holiday in Queensland.

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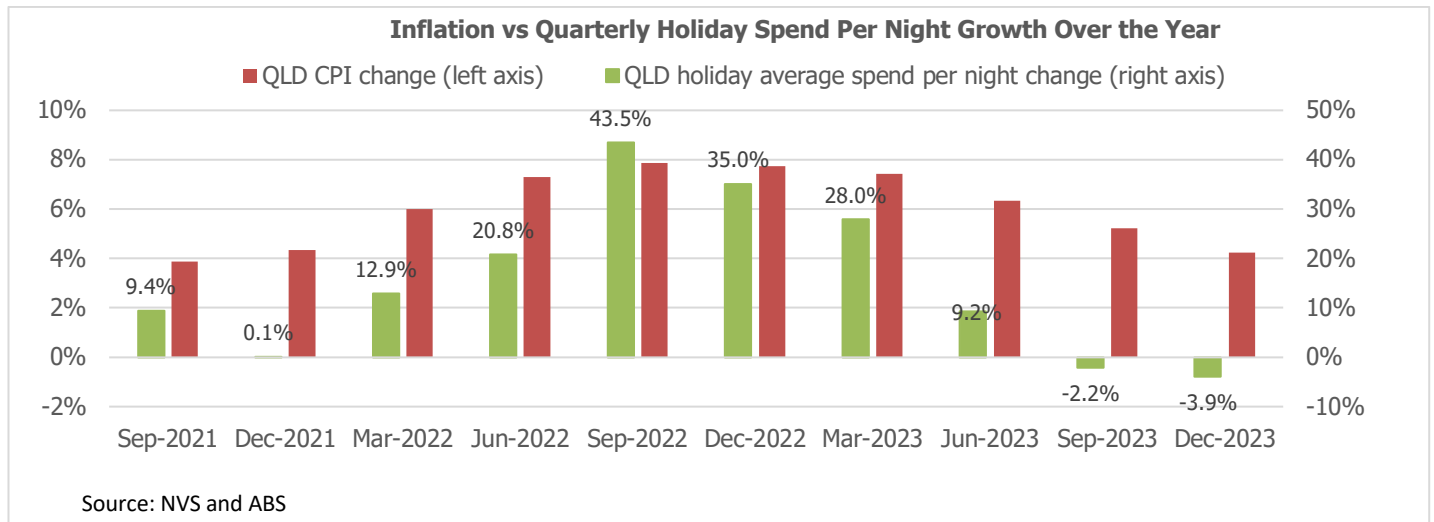


- Queensland benefited from the removal of domestic travel restrictions following the pandemic, with holiday OVE spend per night up 43.5 per cent in the September quarter 2022 (July-September 2022) comparing with the September quarter 2021. However, consistent high inflation and high cost of living had its toll on consumer spend, resulting in growth tapering off to a decline of 3.9 per cent on holiday spend per night in the December quarter 2023 year on year.

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Regional Overview, year ending December 2023

Overnight visitor expenditure

	Total \$m	Annual % change	3yr trend	Change vs 2019
Brisbane	\$7,264.7m	14.1%	39.2%	37.9%
Gold Coast	\$5,479.1m	6.9%	37.0%	48.5%
Sunshine Coast	\$3,958.2m	-7.2%	22.5%	44.2%
TNQ	\$3,754.2m	-14.4%	26.9%	49.7%
SGBR	\$1,631.1m	2.3%	17.3%	36.2%
SQC	\$1,348.5m	6.5%	27.5%	60.5%
Whitsundays*	\$1,206.0m	-20.7%	18.3%	122.1%
Townsville	\$1,169.4m	14.0%	28.2%	48.1%
Mackay*	\$830.2m	26.9%	28.6%	61.2%
Outback*	\$826.6m	5.8%	17.9%	5.4%
Fraser Coast*	\$678.0m	3.0%	25.9%	64.5%

* Note: due to the volatility of small sample sizes for Fraser Coast, Mackay, Whitsundays and Outback, data needs to be treated with caution.

#Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

Visitor trips by region, year ending December 2023

	Holiday visitors	Annual % change	3yr trend	Change vs 2019	Total visitors	Annual % change	3yr trend	Change vs 2019
Brisbane	2,289,000	3.4%	22.2%	0.2%	7,325,000	2.2%	16.7%	-8.5%
Gold Coast	2,259,000	2.2%	22.6%	4.4%	4,137,000	0.4%	20.0%	-1.5%
Sunshine Coast	2,587,000	5.1%	13.1%	17.0%	4,193,000	-0.5%	10.8%	3.6%
TNQ	1,246,000	-18.6%	16.6%	8.3%	2,285,000	-9.5%	14.0%	3.0%
SGBR	814,000	3.6%	9.7%	10.7%	2,124,000	-6.4%	5.5%	-8.3%
SQC	832,000	-11.9%	11.8%	19.4%	2,548,000	-7.1%	10.9%	6.3%
Whitsundays*	490,000	-18.3%	11.0%	24.4%	724,000	-14.9%	8.8%	14.7%
Townsville	450,000	-6.5%	15.0%	11.5%	1,145,000	-5.3%	11.4%	-11.8%
Mackay*	275,000	12.3%	19.9%	32.2%	1,111,000	-6.0%	5.3%	4.3%
Outback*	213,000	-42.8%	-3.7%	-36.9%	962,000	0.6%	3.9%	-16.5%
Fraser Coast*	469,000	8.6%	18.9%	16.4%	861,000	5.0%	13.7%	12.2%

* Note: due to the volatility of small sample sizes for Fraser Coast, Mackay, Whitsundays and Outback, data needs to be treated with caution.

#Change vs 2019 refers to Year Ending December 2019

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Visitor nights by region, year ending December 2023

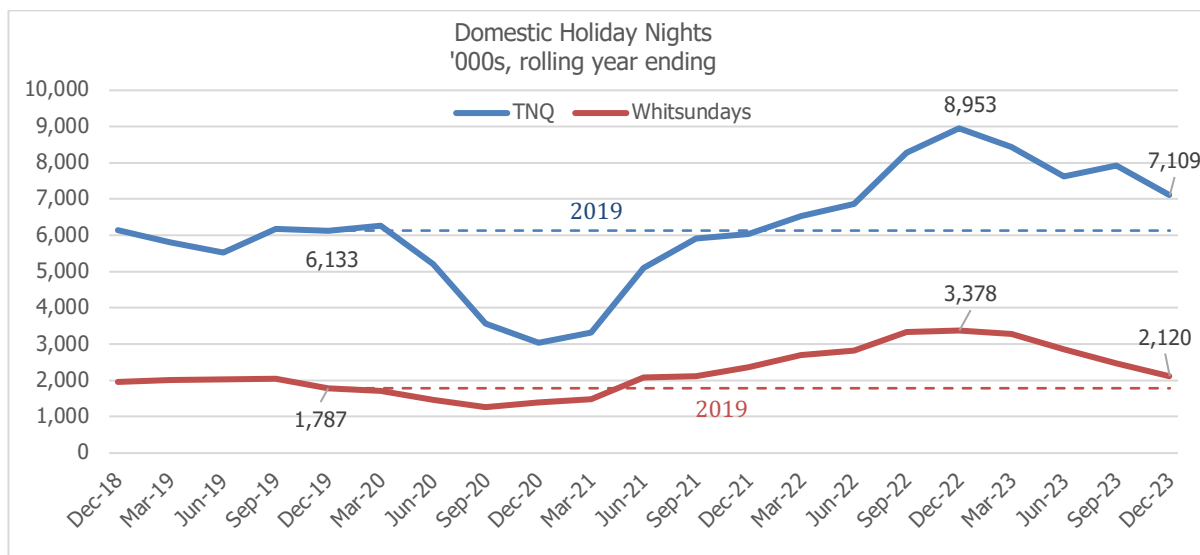
	Holiday nights	Annual % change	3yr trend	Change vs 2019	Total nights	Annual % change	3yr trend	Change vs 2019*
Brisbane	6,268,000	-8.2%	18.3%	0.9%	21,920,000	-4.0%	16.5%	-5.5%
Gold Coast	9,118,000	-3.3%	24.0%	-3.2%	14,895,000	-4.0%	21.2%	-10.1%
Sunshine Coast	9,966,000	3.0%	13.7%	11.4%	15,054,000	1.7%	11.9%	3.5%
TNQ	7,109,000	-20.6%	22.6%	15.9%	11,671,000	-18.4%	14.9%	4.3%
SGBR	2,838,000	-14.6%	8.9%	-3.3%	7,505,000	-7.7%	2.0%	-17.1%
SQC	2,104,000	-4.5%	13.7%	19.8%	7,574,000	3.0%	12.1%	18.9%
Whitsundays*	2,120,000	-37.3%	10.2%	18.6%	2,706,000	-44.4%	5.6%	-3.0%
Townsville	1,745,000	3.9%	22.3%	38.9%	4,201,000	-14.1%	12.0%	-12.2%
Mackay*	759,000	28.1%	23.9%	30.6%	3,873,000	-15.1%	-0.3%	-11.6%
Outback*	772,000	-60.2%	-11.8%	-50.2%	4,087,000	-10.2%	-2.8%	-33.0%
Fraser Coast*	1,908,000	-4.4%	19.2%	-9.1%	3,195,000	-1.1%	16.6%	4.2%

* Note: due to the volatility of small sample sizes for Fraser Coast, Mackay, Whitsundays and Outback, data needs to be treated with caution.

#Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicates a record

- Four regions reached record levels of domestic OVE. They were **Brisbane** (\$7.3 billion, up 14.1 per cent YoY), **Southern Queensland Country** (\$1.3 billion, up 6.5 per cent), **Townsville** (\$1.2 billion, up 14.0 per cent) and **Mackay** (\$830.2 million, up 28.6 per cent over the three year trend).
- Sunshine Coast** (up 5.1 per cent to 2.6 million) and **Fraser Coast** (up 18.9 per cent over the three year trend to 469,000) reached a record number of holiday visitors.
- While all Queensland regions' OVE remains well above 2019 levels, three regions (Tropical North Queensland, Sunshine Coast and Whitsundays) saw a decline in OVE over the year due to the normalisation in domestic travel, TNQ and the Whitsundays region in particular. During COVID, both regions might have been perceived as substitutes of overseas beach destinations such as Bali and Fiji. With the built-up consumer confidence of travelling outbound, we saw the continuous decline in holiday nights in the TNQ and Whitsundays.
- Even though holiday nights decreased over the year in a number of regions, most regions remained above/close to 2019 levels with the exception of two regions: **Outback** (down 45.2 per cent vs 2019 and down 4.6 per cent over the three year trend) and **Fraser Coast** (down 12.1 per cent vs 2019, but up 13.7 per cent over the three year trend).



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The December quarter performance

Looking specifically **at the December quarter 2023**, within the seven regions that can be analysed on a quarterly basis, **Brisbane** (visitation up 12.3 per cent and nights up 12.2 per cent) and **Southern Queensland Country** (visitation up 11.2 per cent and nights up 8.6 per cent) surpassed visitation and nights from the December quarter 2022. **Sunshine Coast** (up 3.1 per cent) also had an increase in visitation.

It is worth noting that among reportable regions, both **Brisbane** and **Sunshine Coast** saw increases in both interstate and intrastate visitation in the December quarter 2023.

Tropical North Queensland was impacted by Tropical Cyclone Jasper in December 2023, which impacted visitation in this month, however monthly mobility data also pointed to a slowing in visitation year on year in both October and November as well.

Quarterly Domestic Visitation, by Region

	Visitation				Nights			
	Dec 2023	Dec 2022	Change over the Year	Change vs 2019*	Dec 2023	Dec 2022	Change over the Year	Change vs 2019*
Brisbane	1,961,000	1,746,000	12.3%	-10.5%	5,641,000	5,028,000	12.2%	-10.2%
Sunshine Coast	1,069,000	1,037,000	3.1%	-6.1%	3,325,000	3,571,000	-6.9%	-20.4%
Southern Queensland Country	651,000	586,000	11.2%	14.9%	1,965,000	1,808,000	8.6%	30.5%
Gold Coast	960,000	1,243,000	-22.8%	-11.8%	3,157,000	4,300,000	-26.6%	-15.2%
SGBR	442,000	558,000	-20.8%	-19.8%	1,546,000	2,161,000	-28.4%	-23.9%
Tropical North Queensland	438,000	649,000	-32.5%	-23.6%	2,248,000	3,141,000	-28.4%	-25.4%
Townsville	284,000	215,000	32.3%	6.4%	807,000	1,014,000	-20.4%	-43.6%
Total	6,233,000	6,455,000	-3.4%	-7.7%	22,086,000	24,752,000	-10.8%	-16.0%

*Change compared to the December quarter 2019

Note: Fraser Coast, Mackay, Whitsundays and Outback regions are not included due to small sample sizes.

Quarterly Intrastate and Interstate Visitation, By Region

	Intrastate				Interstate			
	Dec 2023	Dec 2022	Change over the Year	Change vs 2019*	Dec 2023	Dec 2022	Change over the Year	Change vs 2019*
Brisbane	1,083,000	1,009,000	7.3%	-13.0%	877,000	737,000	19.1%	-7.2%
Sunshine Coast	814,000	804,000	1.2%	0.3%	255,000	232,000	9.7%	-22.2%
Southern Queensland Country	550,000	497,000	10.7%	20.1%	np	np	np	np
Gold Coast	486,000	635,000	-23.4%	-6.2%	474,000	609,000	-22.1%	-16.9%
SGBR	392,000	485,000	-19.1%	-17.8%	np	np	np	np
Tropical North Queensland	297,000	407,000	-27.0%	-27.2%	np	242,000	np	np
Townsville	189,000	168,000	12.7%	-18.4%	np	np	np	np
Total	4,388,000	4,411,000	-0.5%	-4.6%	1,845,000	2,045,000	-9.8%	-14.5%

*Change compared to the December quarter 2019

Note: Fraser Coast, Mackay, Whitsundays and Outback regions are not included due to small sample sizes.

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Frequently asked questions

Where do the numbers come from?

The National Visitor Survey (NVS) commenced in 1998 to provide an official measure of travel by Australian residents. NVS definitions are based on those provided by the United Nations World Tourism Organization (UNWTO). Interviews are conducted with people who have travelled for purposes including holiday, visiting friends and relatives (VFR), business, education and employment. To be included, travellers must not have been away from home continuously for more than 364 days, or 365 days in a leap year.

Respondents interviewed in the NVS are randomly sampled to be representative of the Australian population. The NVS is co-funded by the Commonwealth, state and territory governments under the auspices of the Australian Standing Committee on Tourism (ASCOT). Results from the NVS are published quarterly and are available from tra.gov.au. For full methodology details please visit <https://www.tra.gov.au/en/domestic/national-visitor-survey-methodology>

What are the limitations of the data?

The NVS is conducted with a sample of Australian residents. The NVS is not a census of all visitors so contain sample error.

To minimise sample error, results published from the NVS refer to year ended data only. Quarterly data is provided in this document but should be used with caution. Quarterly data is subject to higher sample error and seasonal variations that may occur between quarters. Seasonal variations are effectively eliminated when using year ended data.

NVS 95% confidence intervals (yearly data):

Region	95% confidence interval
Brisbane	±4.1%
Gold Coast	±5.8%
Sunshine Coast	±5.9%
Southern Great Barrier Reef	±7.5%
Tropical North Queensland	±7.6%
Southern Queensland Country	±7.7%
Townsville	±9.4%
Mackay	±11.3%
Outback Queensland	±11.7%
Fraser Coast	±12.6%
Whitsundays	±13.6%

Why don't the numbers add up?

Domestic visitor numbers to the states of Australia will never sum to the national total.

The reason for this is that domestic visitors may visit more than one state. Visitors are counted each time they visit a state or region but are only counted once in the total for Australia to prevent double counting visitors.

The same concept applies to tourism region data not summing to state totals.

Why aren't variances the same for holiday visitors, total visitors and visitor expenditure?

'Total visitors' includes holiday, VFR, business and other reasons for visiting such as education and employment. Movements in VFR or other purposes of visit often impact the changes seen in overall visitation or expenditure.

Why is the data provided under embargo?

Tourism Research Australia provide the IVS and NVS data under embargo to allow key stakeholders (predominantly those who fund the research) time to brief internal stakeholders and prepare research publications that can be released at the same time data is publicly released by Tourism Research Australia. Any breach of the embargo period is likely to result in TRA no longer providing stakeholders with the data prior to public release.

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Key highlights:

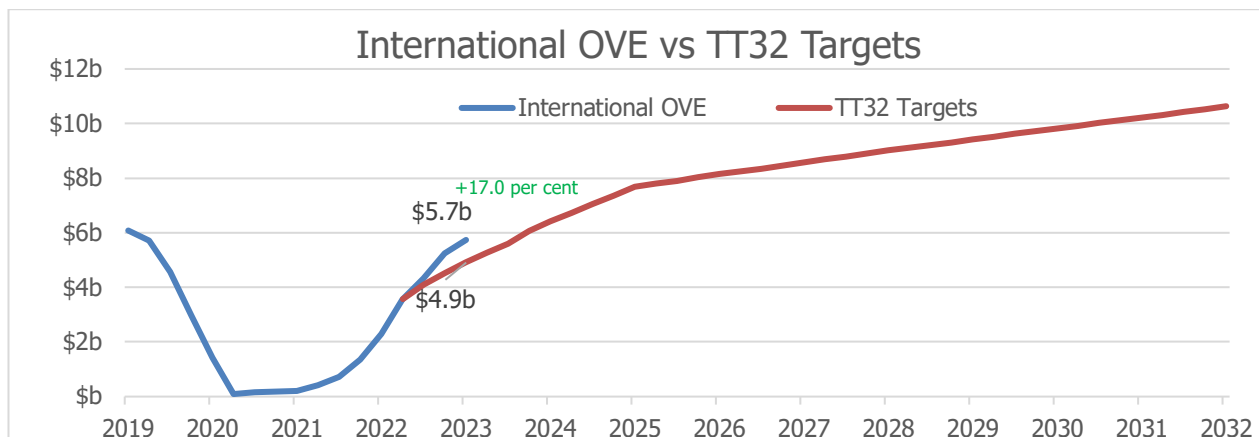
Queensland **outperformed** national average in international OVE recovery. International OVE in Queensland reached 94.4 per cent of its 2019 levels at **\$5.7 billion** in the year ending December 2023. Queensland is **well ahead** of its progressive target to 2032 (+17 per cent).

Queensland followed the national pattern that OVE generated from **VFR reached a record** \$1.1 billion (up 34.3 per cent since 2019). In addition, OVE generated from **business travel also reached a record** \$401.1 million (up 37.7 per cent since 2019), as well as another **record for OVE generated by employment visitation**, achieving \$375.9 million (up 61.2 per cent since 2019).

Both **OVE generated from holiday visitors and education visitors was around 80 per cent** of what they were before COVID.

Queensland held the **number 3 position in total international OVE market share**, and held **the second position** for international holiday OVE, achieving \$2.3 billion in holiday OVE.

Queensland reached **record levels of OVE** from **New Zealand, Canada, Thailand** and **Indonesia** in the Year Ending December 2023.



Three regions reached **record levels of OVE**. They were **Brisbane** (\$2.9 billion, up 1.7 per cent compared to 2019), **Sunshine Coast** (\$365.3 million, up 29.3 per cent compared to 2019) and **Southern Great Barrier Reef** (\$117.8 million, up 19.8 per cent compared to 2019).

Despite a number of regional OVE records, international visitation across all regions is still below pre-COVID levels. **Sunshine Coast** (down 6.7 per cent) and **Townsville** (down 11.5 per cent) are the closest to pre-COVID levels.

It seems that **Tropical North Queensland** (down 43.4 per cent) and **Gold Coast** (down 43.3 per cent) are recovering at a slower pace than other regions. Before COVID, around one in four international visitors to Gold Coast and to the TNQ regions were Chinese visitors. With the slow recovery of Chinese outbound travel to Australia, their heavy reliance on the China market could have had an impact on their international recovery pace.

Comparison of Queensland's OVE

Queensland	Pre-COVID YE December 2019	Now YE December 2023
International		
Top Five Markets OVE and share of QLD OVE	1.China (\$1,612.3m, 26.5 per cent of QLD OVE) 2. New Zealand (\$605.4m, 10.0 per cent) 3. Japan (\$459.8m, 7.6 per cent) 4. USA (\$419.1m, 6.9 per cent) 5. United Kingdom (\$342.4, 5.6 per cent)	Top markets are the same, but different order: 1. New Zealand (\$788.1m, 13.7 per cent of QLD OVE) 2. United Kingdom (\$466.2m, 8.1 per cent) 3. Japan (\$463.0m, 8.1 per cent) 4. China (\$459.1m, 8.0 per cent) 5. USA (\$404.8m, 7.0 per cent)
Proportion of QLD OVE from those travelling for holiday purposes	47 per cent	Lower than what it was in 2019 39 per cent

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Methodology update due to COVID-19 border closures:

- The IVS produces international visitation estimates using a combination of airport interviews, immigration data taken from visa applications/passports, previous travel records and sampled incoming passenger cards.
- The IVS estimates for the year ending December 2023 are based on 100% interview data, the first full year since year ending December 2019.
- Tourism Research Australia imputed IVS estimates from the March quarter 2020 to June quarter 2022. This was due to COVID-19 related international border closures and insufficient sample size of interviews. The IVS estimates for September quarter 2022 and December quarter 2022 were based on a combination of interview data and imputation.
- Please see [International Visitor Survey \(IVS\) methodology | Tourism Research Australia](#) for more information.

Queensland and Australia – Year ending December 2023

Year-ended overnight visitor expenditure and overnight visitor trips

	Total \$m ³	Annual % change	3yr trend	Change since 2019	Total visitors ³	Annual % change	3yr trend	Change since 2019
Queensland	\$5,743.2m	149.9%	110.4%	-5.6%	1,973,000	115.3%	100.7%	-29.1%
New South Wales	\$10,959.5m	119.0%	98.7%	-3.7%	3,423,000	116.9%	102.2%	-21.9%
Victoria	\$6,432.3m	95.8%	64.6%	-27.1%	2,082,000	98.7%	85.0%	-33.7%
Western Australia	\$2,300.6m	118.4%	103.6%	-3.5%	785,000	97.1%	89.2%	-21.2%
South Australia	\$1,276.8m	145.8%	117.5%	5.9%	439,000	143.3%	112.4%	-9.9%
ACT	\$467.9m	90.1%	94.0%	-17.2%	179,000	102.9%	105.4%	-33.8%
Northern Territory	\$450.9m	148.6%	134.2%	3.3%	191,000	112.3%	96.9%	-36.1%
Tasmania	\$365.2m	138.4%	53.2%	-34.2%	207,000	146.5%	74.0%	-26.7%
Australia	\$27,996.5m	119.7%	92.0%	-10.9%	6,640,000	94.4%	92.3%	-23.8%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicate a record

	Holiday \$m	Change vs 2019	Holiday visitors	Change since 2019
Queensland	\$2,261.3m	-21.0%	1,101,000	-41.2%
New South Wales	\$3,222.9m	-9.7%	1,648,000	-32.7%
Victoria	\$1,616.3m	-29.2%	965,000	-43.1%
Western Australia	\$804.7m	-12.1%	353,000	-34.2%
South Australia	\$249.7m	-9.8%	193,000	-25.2%
ACT	\$36.2m	-35.1%	65,000	-46.8%
Northern Territory	\$275.1m	-18.9%	146,000	-41.4%
Tasmania	\$240.0m	-23.3%	149,000	-33.9%
Australia	\$8,706.3m	-18.0%	3,096,000	-34.1%

*Change vs 2019 refers to Year Ending December 2019

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	Queensland		Australia	
	Expenditure	Change since 2019	Expenditure	Change since 2019
Holiday	\$2,261.3m	-21.0%	\$8,706.3m	-18.0%
VFR	\$1,090.7m	34.3%	\$4,860.4m	6.6%
Business	\$401.1m	37.7%	\$2,002.2m	-2.0%
Employment	\$375.9m	61.2%	\$1,932.5m	24.5%
Education	\$1,475.9m	-18.6%	\$10,020.6m	-18.3%
Other reason	\$514.2m	69.6%	\$2,406.9m	23.7%
Leisure	\$3,351.9m	-8.8%	\$13,566.7m	-10.6%
Total purpose	\$5,743.2m	-5.6%	\$27,996.5m	-10.9%

*Change vs 2019 refers to Year Ending December 2019

Note: Yellow highlights indicate a record

	Queensland		Australia	
	Visitors	Change since 2019	Visitors	Change since 2019
Holiday	1,101,000	-41.2%	3,096,000	-34.1%
VFR	724,000	-4.0%	2,993,000	-11.6%
Business	175,000	-15.3%	753,000	-28.5%
Employment	54,000	21.6%	246,000	19.2%
Education	78,000	-34.0%	436,000	-33.3%
Other reason	151,000	55.3%	774,000	1.1%
Total purpose	1,973,000	-29.1%	6,640,000	-23.8%

*Change vs 2019 refers to Year Ending December 2019

	International OVE				
	Holiday OVE share	Change vs 2019	Total OVE share	Annual change	Change vs 2019
Queensland	26.0%	↓1.0%	20.5%	↑2.5%	↑1.2%
New South Wales	37.0%	↑3.4%	39.1%	↓0.1%	↑2.9%
Victoria	18.6%	↓3.0%	23.0%	↓2.8%	↓5.1%
Western Australia	9.2%	↑0.6%	8.2%	●0.0%	↑0.6%
South Australia	2.9%	↑0.3%	4.6%	↑0.5%	↑0.7%
ACT	0.4%	↓0.1%	1.7%	↓0.3%	↓0.1%
Northern Territory	3.2%	●0.0%	1.6%	↑0.2%	↑0.2%
Tasmania	2.8%	↓0.2%	1.3%	↑0.1%	↓0.5%

National results

- International Overnight visitor expenditure (OVE) within Australia reached \$28.0 billion in the year ending December 2023, down 10.9 per cent comparing with 2019.

The return of international travel by purpose of travel has been similar to what occurred in the domestic tourism space when state borders were reopened in late 2021, i.e. visiting friends and relatives (VFR) visitors came first, followed by holiday visitors and visitors by other purposes. Spend by VFR visitors in Australia reached a record \$4.9 billion (up 6.6 per cent comparing with 2019) and OVE by employment visitors reached \$1.9billion (up 24.5 per cent comparing with 2019).

Most states and territories were still in recovery phase in OVE, with the exception of South Australia, reaching a record \$1.3 billion, up 5.9 per cent, and Northern Territory achieving \$450.9 million in OVE, up 3.3 per cent compared with 2019.

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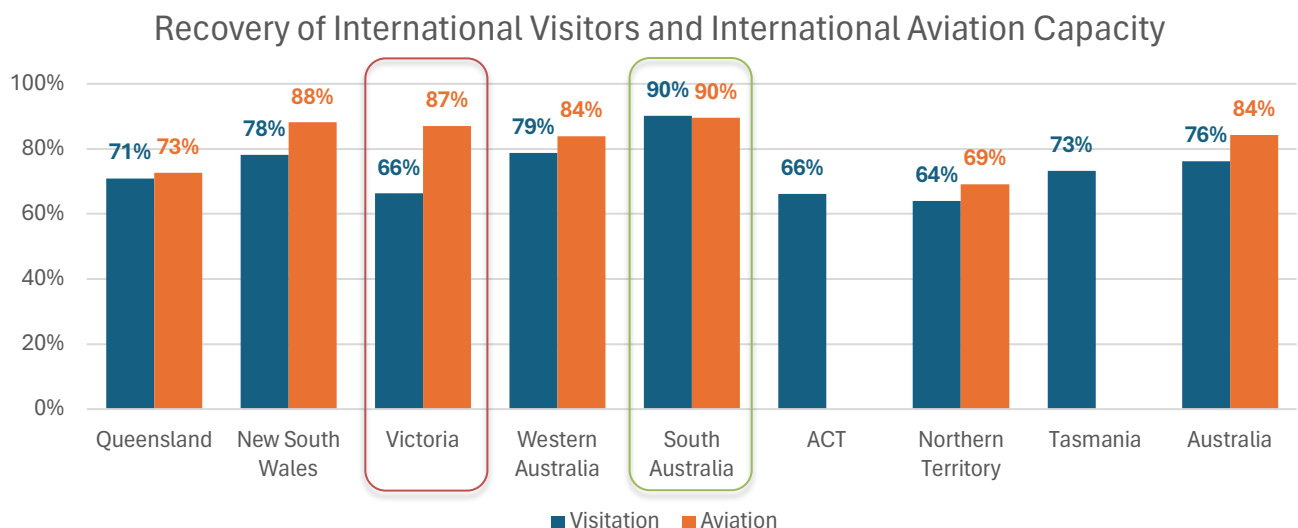
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- NSW took the lead in total international OVE, reaching \$11.0 billion, followed by Victoria, reaching \$6.4 billion. Queensland was sitting slightly behind what it is before COVID (\$6.0 billion in 2019), achieving \$5.7 billion in total international OVE.
- Queensland held the number 2 position in international holiday OVE, achieving \$2.3 billion, 79.0 per cent of what it was before COVID. New South Wales took the lead position, reaching \$3.2 billion in international holiday OVE, 90.3 per cent of what it was before COVID.
- In the year ending December 2023, there were 6.6 million international visitors to Australia (76.2 per cent of what it was before COVID). Employment visitation was the only segment that exceeded pre-COVID levels (246,000 trips, up 19.2 per cent). Visiting friends and relatives was close to what it was before COVID (at 3.0 million trips, 88.4 per cent of what it was before COVID).

Both visitation for holiday and education purposes were sitting around two thirds of what they were before COVID. There were 3.1 million trips made by holiday visitors (65.9 per cent of what it was before COVID), and 436,000 trips made by education visitors (66.7 per cent of what it was before COVID).

Recovery of international visitation vs international aviation capacity CY2023 vs. CY2019



Source: Cirium and IVS

- Nationally, international aviation capacity (84% of 2019 levels) has returned at a **faster rate** than the number of international visitors (76%) when compared to the Year Ending December 2019 period.
- At the state level, there appears to be **some correlation** between the restoration of international services and the return of international visitors. **South Australia** has had the strongest recovery in international visitation and aviation capacity among the states, while the Northern Territory had the lowest recovery of visitation and aviation capacity.

Queensland's recovery in visitation (71%) was in-line with the recovery in aviation capacity (73%).

It is interesting to note that **Victoria** was one of the regions that had the strongest recovery in aviation capacity (87%) alongside New South Wales and South Australia, however, it had one of the slowest paces of recovery in visitation (66%) alongside Northern Territory and ACT. It seems their recovery of aviation supply outpaced their international visitation demand recovery.

Queensland results

- Queensland **outperformed** the national average in international OVE recovery. International OVE in Queensland reached 94.4 per cent of its 2019 levels at \$5.7 billion in the year ending December 2023.
- Queensland followed the national pattern that OVE generated from **VFR reached a record** \$1.1 billion (up 34.3 per cent since 2019). In addition, OVE generated from **business travel also reached a record** \$401.1 million, up 37.7

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per cent since 2019), as well as another **record for OVE generated by employment**, achieving \$375.9 million (up 61.2 per cent since 2019).

Both **OVE generated from holiday visitors and education visitors was around 80 per cent** of what they were before COVID. Holiday OVE (at \$2.3 million, 79 per cent of what it was before COVID) and education OVE (at \$1.5 billion, 81.4 per cent of what it was before COVID).

- Queensland welcomed 2.0 million international visitors in the year ending December 2023, 70 per cent of what it was before COVID. This included a total of 1.1 million holiday visitors, 58.8 per cent of what it was before COVID 2019.

Queensland's top source markets

- Queensland's top five source markets by OVE were **New Zealand** (a record \$788.1 million, up 30.2 per cent since 2019), **the United Kingdom** (\$466.2 million, up 36.1 per cent), **the USA** (\$404.8 million, down 3.4 per cent), **Japan** (\$463.0 million, steady up 0.7 per cent) and **China** (\$459.1 million, down 71.5 per cent).
- Outside of the top five source markets, Queensland reached record levels of OVE from **Canada** (\$238.0 million, up 64.1 per cent), **Thailand** (\$146.8 million, up 157.7 per cent) and **Indonesia** (\$115.4 million, up 89.0 per cent).
- Despite the growth in OVE in a number of source markets, visitation is still below 2019 levels for most source markets including all the top five.
- Queensland was behind the national average in international visitation recovery. However, a few source markets had stronger visitation performance than before COVID, and they are: **Canada** (a record 69,000 visitors, up 2.7 per cent vs. 2019), **South Korea** (83,000 visitors, up 12.3 per cent), **Thailand** (29,000, up 50.8 per cent) and **Switzerland** (16,000, up 4.7 per cent).

Year ending December 2023 top 20 source market by OVE

	Total expenditure \$m	Change since 2019	Current rank	2019 Rank
NZ	\$788.1m	30.2%	1↑	2
UK	\$466.2m	36.1%	2↑	5
Japan	\$463.0m	0.7%	3	3
China	\$459.1m	-71.5%	4↓	1
USA	\$404.8m	-3.4%	5↓	4
Korea	\$263.7m	5.4%	6	6
Canada	\$238.0m	64.1%	7↑	12
India	\$192.9m	28.5%	8↑	11
Germany	\$158.2m	-2.1%	9	9
Thailand	\$146.8m	157.7%	10↑	18
Hong Kong	\$145.3m	-29.6%	11↓	8
Singapore	\$134.7m	-11.1%	12↑	10
Indonesia	\$115.4m	89.0%	13↑	16
Malaysia	\$111.6m	33.6%	14↑	15
Scandinavia	\$109.2m	-3.3%	15↓	13
France	\$104.4m	21.1%	16↓	14
Netherlands	\$57.0m	6.9%	17↑	19
Switzerland	\$52.9m	82.9%	18↑	20
Italy	\$50.5m	-12.2%	19↓	17
Taiwan	np	np	np	
Total	\$5,743.2m	-5.6%		

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Year ending December 2023 top 20 visitation by source market

	Queensland			Australia		
	Total Visitors	Annual Change	Change since 2019	Total visitors	Annual Change	Change since 2019
NZ	434,000	80.7%	-11.3%	1,147,000	81.5%	-11.7%
UK	199,000	64.3%	-8.9%	561,000	51.9%	-16.4%
USA	189,000	164.6%	-20.2%	617,000	105.3%	-19.6%
Japan	125,000	340.1%	-43.1%	272,000	267.5%	-40.6%
China	96,000	669.1%	-80.6%	507,000	480.0%	-61.8%
Korea	83,000	672.5%	12.3%	263,000	287.7%	3.4%
India	73,000	69.7%	-11.6%	375,000	28.8%	-0.6%
Canada	69,000	182.1%	2.7%	147,000	81.4%	-17.5%
Germany	64,000	125.4%	-21.2%	144,000	78.8%	-27.3%
Singapore	39,000	7.4%	-43.9%	316,000	23.8%	-24.1%
France	35,000	64.2%	-27.8%	108,000	89.7%	-20.4%
Scandinavia	30,000	83.9%	-28.1%	76,000	72.1%	-25.8%
Hong Kong	29,000	461.5%	-56.0%	169,000	241.5%	-40.8%
Thailand	29,000	197.8%	50.8%	90,000	81.5%	-4.8%
Malaysia	29,000	168.8%	-37.5%	161,000	101.7%	-53.1%
Indonesia	27,000	84.9%	-7.9%	181,000	117.7%	-8.0%
Netherlands	22,000	126.9%	-11.2%	49,000	66.3%	-20.6%
Italy	21,000	146.2%	-16.6%	60,000	70.7%	-17.4%
Switzerland	16,000	99.2%	4.7%	39,000	91.9%	-23.0%
Taiwan	n/p	n/p	n/p	112,000	360.1%	-37.0%
Other Asia	78,000	64.9%	13.4%	495,000	85.0%	13.8%
Other Europe	76,000	87.8%	-20.0%	237,000	71.6%	-10.0%
Other Countries	191,000	93.7%	1.1%	514,000	72.1%	-5.3%
Total	1,973,000	115.3%	-29.1%	6,640,000	94.4%	-23.8%

Source: IVS

Note: Yellow highlights indicate a record

Year ending December 2023 top 20 holiday visitation by source market

	Holiday visitors	Change since 2019
NZ	221,000	-11.5%
UK	132,000	-8.7%
USA	124,000	-26.6%
Japan	86,000	-49.4%
China	39,000	-90.5%
Korea	64,000	12.2%
India	27,000	-43.9%
Canada	41,000	-12.6%
Germany	52,000	-27.4%
Singapore	22,000	-49.9%
France	29,000	-29.3%
Scandinavia	24,000	-26.7%
Malaysia	14,000	-50.8%
Indonesia	15,000	-11.7%
Netherlands	18,000	-16.8%
Italy	12,000	-41.1%
Switzerland	13,000	4.1%

Executive Summary – International Visitor Survey

Year ending December 2023

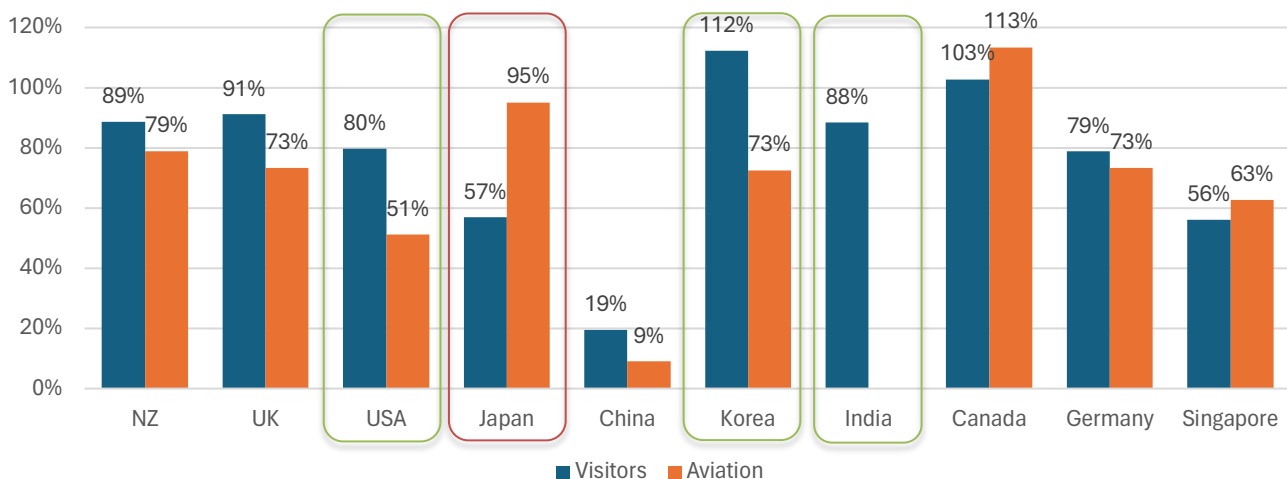
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Hong Kong	np	np
Thailand	np	np
Taiwan	np	np
Other Asia	21,000	-14.3
Other Europe	53,000	-28.3%
Other Countries	64,000	-22.9%
Total	1,101,000	-41.2%

Source market recovery vs Aviation capacity recovery to Queensland

- For many of the top international source markets, Queensland was able to achieve a faster recovery in visitation than aviation capacity. However, there were a few exceptions with **Japanese** visitation recovering at a slower rate than aviation.
- On the other hand, visitation recovery from **the USA** and **Korea** outpaced the recovery of direct services to these markets. While there have not been direct services from India to Queensland, we saw strong recovery of the **India** market, led by VFR visitors (a record 36,000 VFR visitors to Queensland in the YE December 2023).

Source Market Recovery and Aviation Capacity Recovery to Queensland in CY2023



* UK and Germany aviation capacity includes services from Singapore, Qatar and UAE
Source: Cirium and IVS

Deep dive into Source Markets

New Zealand

- Significant increase in spend by holiday and VFR visitors from New Zealand contributed to the record OVE from New Zealand.
- Both holiday (88.5 per cent recovered) and VFR (95.7 per cent recovered) visitation was close to what it was before COVID, and these visitors tended to stay longer than what they used to before COVID.

Visitation to Queensland from New Zealand Year ending December 2023									
	Expenditure			ALoS		Spend per night		Visitors	
	2023	% Change	\$ change vs 2019	2023	Change vs 2019	2023	% Change vs 2019	2023	% Change vs 2019
Holiday	\$425.3m	21.0%	\$73.8m	8.7	0.8	\$222	24.9%	221,000	-11.5%
VFR	\$239.1m	41.4%	\$70.0m	10.7	1.5	\$105	26.6%	213,000	-4.3%
Business	\$59.3m	25.9%	\$12.2m	5.1	1.0	\$335	44.9%	35,000	-29.4%
Education	\$6.0m	-37.7%	-\$3.6m	47.7	21.0	\$89	-22.1%	1,000	-55.2%
Employment	\$23.5m	13.1%	\$2.7m	49.3	-0.3	\$79	65.8%	6,000	-31.3%
Other	\$35.0m	372.7%	\$27.6m	2.4	1.3	\$388	22.2%	38,000	77.9%
Total	\$788.1m	30.2%	\$182.7m	11.1	1.4	\$163	28.5%	434,000	-11.3%

Indicating strong increase Record numbers

Executive Summary – International Visitor Survey

Year ending December 2023

Under strict embargo until 12:01 am (AEDT), Wednesday 27th March 2024

Canada

- Canada reached a record of OVE in Queensland.
- The VFR market made a significant contribution to the record OVE. There were a record 25,000 VFR visitors to Queensland, and they spent well above what they did before COVID when they were in Queensland.
- Holiday visitation was 87.4 per cent of what it was before COVID, and these visitors generated 30% more OVE than what they did before COVID.
- There is some evidence that education expenditure has contributed to this record, however, it is not reportable due to small sample sizes.

Visitation to Queensland from Canada Year ending December 2023

	Expenditure			ALoS		Spend per night		Visitors	
	2023	% Change vs 2019	\$ change vs 2019	2023	Change vs 2019	2023	% Change vs 2019	2023	% Change vs 2019
Holiday	\$89.7m	30.6%	\$21.0m	18.3	5.1	\$119	7.9%	41,000	-12.6%
VFR	\$55.4m	146.8%	\$33.0m	18.7	3.8	\$119	66.0%	25,000	18.2%
Business	\$12.5m	29.9%	\$2.9m	6.4	-2.1	\$288	13.9%	7,000	51.2%
Education	\$71.7m	79.3%	\$31.7m	173.2	75.0	\$211	-8.0%	2,000	10.5%
Employment	\$2.3m	-25.6%	-\$0.8m	37.2	-70.0	\$107	103.0%	1,000	5.7%
Other	\$6.4m	430.3%	\$5.2m	3.0	1.9	\$219	-40.5%	10,000	215.4%
Total	\$238.0m	64.1%	\$93.0m	24.1	6.0	\$144	20.1%	69,000	2.7%

Indicating significant change Record numbers

Thailand

- The record OVE generated by Thai visitors was predominantly due to the surge of VFR visitors from Thailand.
- VFR visitation from Thailand was up 72.1 per cent compared to 2019, and these visitors tended to stay longer.
- While it is non publishable, it looks like holiday and education visitors contributed to the uplift of OVE to Queensland.

Visitation to Queensland from Thailand Year ending December 2023

	Expenditure			ALoS		Spend per night		Visitors	
	2023	% Change vs 2019	\$ change vs 2019	2023	Change vs 2019	2023	% Change vs 2019	2023	% Change vs 2019
Holiday	\$30.3m	204.6%	\$20.4m	59.4	41.8	\$52	-38.9%	10,000	48.5%
VFR	\$32.5m	343.2%	\$25.2m	84.3	57.4	\$25	-17.8%	15,000	72.1%
Business	\$4.2m	-23.6%	-\$1.3m	4.5	-3.5	\$354	79.8%	3,000	-23.9%
Education	\$71.3m	111.9%	\$37.6m	157.8	23.7	\$141	32.1%	3,000	36.4%
Employment	\$7.2m	116590.0%	\$7.2m	118.6	117.6	\$66	9.8%	1,000	795.9%
Other	\$1.3m	145.7%	\$0.7m	3.1	2.1	\$207	-58.7%	2,000	93.0%
Total	\$146.8m	157.7%	\$89.8m	86.5	49.9	\$59	-27.8%	29,000	50.8%

Indicating significant change increase Record numbers

Indonesia

- The biggest contributor to the record OVE from Indonesia is from the VFR market.
- It is also noticeable that the recovery of holiday visitation reached 88.3 per cent of what it was before COVID.
- The VFR market is the largest source of OVE in 2023, but growth rates compared to 2019 are not reportable due to the small sample size in 2019.

Visitation to Queensland from Indonesia Year ending December 2023

	Expenditure			ALoS		Spend per night		Visitors	
	2023	% Change vs 2019	\$ change vs 2019	2023	Change vs 2019	2023	% Change vs 2019	2023	% Change vs 2019
Holiday	\$26.5m	23.3%	\$5.0m	26.0	7.5	\$67	-0.4%	15,000	-11.7%
VFR	\$43.2m	356.0%	\$33.8m	19.1	-17.4	\$262	653.9%	9,000	15.6%
Business	\$3.5m	7.3%	\$0.2m	9.9	5.5	\$172	-35.9%	2,000	-25.4%
Education	\$31.9m	30.1%	\$7.4m	122.5	43.2	\$201	38.6%	1,000	-39.2%
Employment	\$8.6m	446.0%	\$7.1m	90.8	33.5	\$90	170.7%	1,000	27.4%
Other	\$1.6m	124.3%	\$0.9m	2.1	0.2	\$445	96.4%	2,000	5.0%
Total	\$115.4m	89.0%	\$54.3m	31.3	3.0	\$138	85.6%	27,000	-7.9%

Indicating significant change increase Record numbers

Executive Summary – International Visitor Survey

Year ending December 2023

Under strict embargo until 12:01 am (AEDT), Wednesday 27th March 2024

South Korea

- South Korea (along with Canada) is one of only two nations where visitation exceeded the pre-COVID levels.
- The growth in visitation largely came from the Holiday and VFR visitors.
- OVE generated from education and VFR visits contributed to the recovery of OVE from the Korea market.

Visitation to Queensland from South Korea
Year ending December 2023

	Expenditure			ALoS		Spend per night		Visitors	
	2023	% Change vs 2019	\$ change vs 2019	2023	Change vs 2019	2023	% Change vs 2019	2023	% Change vs 2019
Holiday	\$113.0m	-21.6%	-\$31.1m	14.7	-20.3	\$119	66.0%	64,000	12.2%
VFR	\$26.2m	129.0%	\$14.8m	17.6	6.2	\$117	26.3%	13,000	17.8%
Business	\$16.8m	90.1%	\$8.0m	7.9	-1.8	\$292	30.8%	7,000	78.2%
Education	\$98.2m	47.7%	\$31.7m	147.8	29.4	\$141	48.9%	5,000	-20.5%
Employment	\$6.5m	-65.3%	-\$12.2m	156.1	-33.8	\$57	-4.0%	1,000	-59.5%
Other	\$3.0m	313.2%	\$2.3m	0.9	-1.0	\$1,185	102.8%	3,000	330.7%
Total	\$263.7m	5.4%	\$13.5m	24.5	-18.8	\$129	65.8%	83,000	12.3%

 Indicating significant change increase

Regional

- Four regions reached new international OVE records. They were **Brisbane** (\$2.9 billion, up 1.7 per cent compared to 2019), **Sunshine Coast** (\$365.3 million, up 29.3 per cent compared to 2019), and **SGBR** (\$117.8 million, up 19.8 per cent compared to 2019).

In addition, Fraser Coast (\$50.0 million, up 9.6 per cent compared to 2019) and Outback (\$23.7 million, up 59.3 per cent compared to 2019) also surpassed their 2019 OVE levels. Note Outback, Southern Queensland Country and Mackay growth is usually reported on a three year trend basis given large expected variability in the annual growth due to smaller sample sizes. Given no data was available for 2020-2022, we are comparing directly to 2019.

- Despite a number of regional OVE records, international visitation across all regions is still below pre-COVID levels. **Sunshine Coast** (down 6.7 per cent) and **Townsville** (down 11.5 per cent) are the closest to pre-COVID levels.

It seems that **Tropical North Queensland** (down 43.4 per cent) and **Gold Coast** (down 43.3 per cent) are recovering at a slower pace than other regions. Before COVID, around one in four international visitors to Gold Coast and to the TNQ regions were Chinese visitors. With the slow recovery of Chinese outbound travel to Australia, their heavy reliance on the China market could have had an impact on their international recovery pace.

Overnight expenditure, By Region

	Total \$m	Change since 2019
Brisbane	\$2,931.7m	1.7%
Gold Coast	\$1,093.9m	-18.4%
TNQ	\$831.3m	-19.1%
Sunshine Coast	\$365.3m	29.3%
Whitsundays	\$121.5m	-20.2%
SGBR	\$117.8m	19.8%
SQC*	\$114.5m	-2.0%
Townsville	\$73.0m	-23.7%
Fraser Coast	\$50.0m	9.6%
Outback*	\$23.7m	59.3%
Mackay*	np	np
Queensland	\$5,743.2m	-5.6%

Source: IVS

Executive Summary – International Visitor Survey

Year ending December 2023

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Overnight visitation, By Region

	Holiday visitors	Change since 2019	Total visitors	Change since 2019
Brisbane	453,000	-41.4%	1,156,000	-21.8%
Gold Coast	416,000	-51.1%	612,000	-43.3%
TNQ	396,000	-47.0%	458,000	-43.4%
Sunshine Coast	215,000	-14.3%	308,000	-6.7%
Whitsundays	147,000	-30.1%	156,000	-29.1%
SGBR	63,000	-42.2%	93,000	-34.2%
SQC*	15,000	-40.6%	45,000	-30.9%
Townsville	85,000	-18.5%	112,000	-11.5%
Fraser Coast	77,000	-34.0%	86,000	-34.1%
Outback*	11,000	-27.7%	19,000	-26.0%
Mackay*	24,000	-34.3%	33,000	-31.3%
Queensland	1,101,000	-18.0%	1,973,000	-29.1%

Domestic Tourism Snapshot

Year ending December 2023



Domestic overnight visitors within Australia

	Visitors	Annual ¹ change	Change vs YE Dec 2019	Avg ² stay	Annual # change
Total Australia ³	112,584,000	4.0%	-4.1%	3.6	-0.1
Holiday	47,634,000	0.0%	3.0%	3.7	-0.2
VFR ⁴	37,477,000	5.5%	-6.2%	3.2	-0.1
Business	23,534,000	9.8%	-13.0%	3.6	0.0

Intrastate ³	79,862,000	3.8%	-1.9%	2.9	-0.1
Holiday	35,292,000	-0.7%	3.8%	3.0	-0.1
VFR ⁴	26,576,000	5.9%	-6.4%	2.4	-0.1
Business	13,991,000	9.4%	-5.1%	3.5	0.0

Interstate ³	34,919,000	4.6%	-8.9%	4.8	-0.3
Holiday	13,393,000	1.6%	1.4%	5.3	-0.4
VFR ⁴	11,323,000	4.6%	-5.1%	4.9	-0.1
Business	9,771,000	10.3%	-22.3%	3.6	-0.1

Domestic overnight visitor expenditure in Australia

	Expenditure	Annual ¹ change	Change vs YE Dec 2019
Total Australia ⁵	\$109,330.9m	8.0%	35.5%
Holiday ⁶	\$52,988.6m	0.5%	47.7%
VFR ⁶	\$18,861.7m	7.7%	33.7%
Business ⁶	\$21,924.6m	28.2%	18.9%



MILLAA MILLAA, TROPICAL NORTH QUEENSLAND

Business lifts domestic travel up

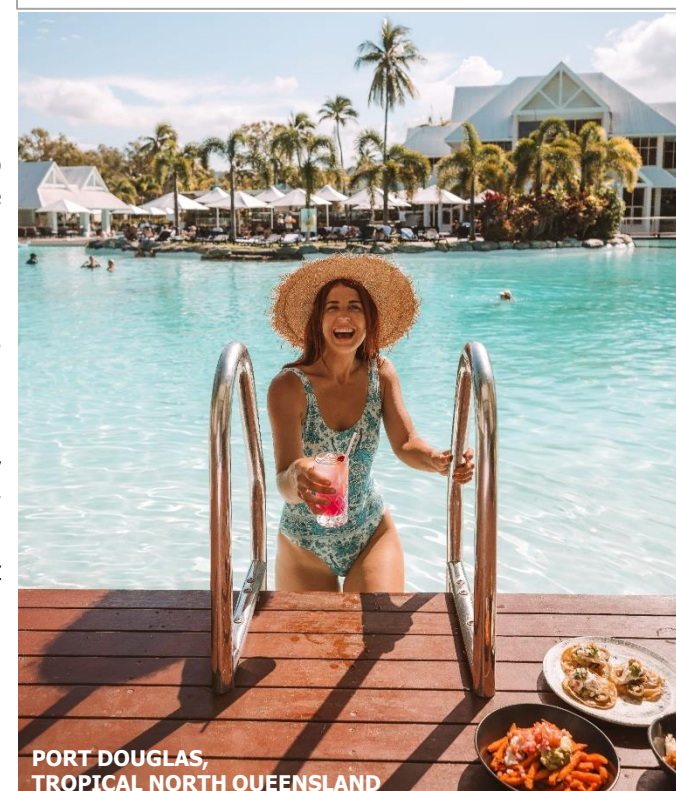
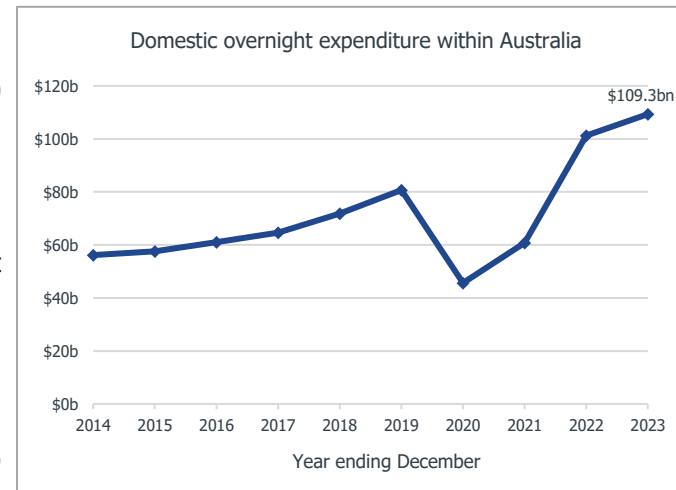
Domestic overnight visitor expenditure (OVE) in Australia once again reached a new record (\$109.3 billion, up 8.0 per cent year on year). This was the result of continued growth in visitation over the year (up 4.0 per cent), along with visitors increasing the amount they spent per night. While visitors tended to shorten the length of their trips, visitor nights remained steady over the year. Overnight visitor expenditure increased across all states and territories, with the exception of the Northern Territory.

The increases in both visitation and spend at the national level have been driven particularly by strong growth in business travel. Business travel has been the slowest to return since domestic travel restrictions ended in late 2021 and is now catching up to the recovery pace of other travel purposes, with business OVE reaching record levels.

There was continuous growth in visiting friends and relatives (VFR) visitation and spend, with spend also reaching a record for the nation. It is also interesting to note that holiday visitation was flat comparing with the year prior with 0.0 per cent change.

It seems that there is an increasing number of Australians choosing to travel overseas especially to destinations such as Bali and Japan.

Nationally, growth in intrastate expenditure has slightly outpaced interstate expenditure. The difference mostly reflects stronger intrastate business OVE growth compared to interstate. Intrastate holiday OVE grew slightly, but interstate holiday OVE was only steady.



PORT DOUGLAS, TROPICAL NORTH QUEENSLAND

Domestic Tourism Snapshot

Year ending December 2023



Domestic overnight visitors in Queensland

	Visitors	Annual change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Queensland	24,992,000	-2.3%	-3.6%	3.9	-0.2
Holiday	10,585,000	-4.1%	5.8%	4.3	-0.3
VFR	7,940,000	-5.2%	-11.2%	3.5	-0.2
Business	5,545,000	6.3%	-9.5%	3.4	-0.3
Intrastate	17,523,000	0.1%	-1.5%	3.1	-0.2
Holiday	7,217,000	0.6%	8.4%	3.1	-0.2
VFR	5,547,000	-6.9%	-14.1%	2.5	-0.3
Business	3,792,000	6.7%	-3.6%	3.4	-0.4
Interstate	7,469,000	-7.6%	-8.1%	5.8	-0.2
Holiday	3,368,000	-12.8%	0.5%	6.7	-0.2
VFR	2,393,000	-0.9%	-3.9%	5.7	-0.2
Business	1,753,000	5.4%	-20.2%	3.4	-0.3

Domestic overnight visitor expenditure in Queensland

	Expenditure	Annual change	Change vs YE Dec 2019
Total Queensland ⁵	\$28,266.0m	1.8%	45.4%
Holiday ⁶	\$14,906.1m	-5.7%	55.6%
VFR ⁶	\$4,531.9m	-0.8%	37.5%
Business ⁶	\$5,131.5m	23.9%	29.9%



PORT DOUGLAS, TROPICAL NORTH QUEENSLAND

Business keeps Expenditure Growing in Queensland

The amount spent by domestic visitors to Queensland grew slightly over the year (up 1.8 per cent to \$28.3 billion). This occurred because visitors spent more per night on average (up 10.7 per cent to \$291). The total number of visitors (down 2.3 per cent to 25.0 million) and visitor nights (down 8.0 per cent to 97.1 million) were both down over the year.

Business OVE drove Queensland's increase in expenditure, reaching its fifth consecutive record (up 23.9 per cent to \$5.1 million). Business travel was up 6.3 per cent to 5.5 million over the year, and business spend per night grew 28.6 per cent to \$274. Among the other travel purposes, visiting friends and relatives OVE was steady over the year (down 0.8 per cent to \$4.5 billion), and holiday OVE was down (down 5.7 per cent to \$14.9 billion). Holiday visitation was also down (down 4.1 per cent to 10.6 billion), but remained above pre-COVID-19 levels (up 5.8 per cent vs. 2019).

Headwinds are more prominent in recent quarters which reflect on the impact of rising cost of living and the slowdown of the economy in Australia

At the national level, since the Australian border reopening in January 2022, we continued to see strong recovery of outbound travel. Outbound travel is close to full recovery in the December quarter 2023, and intrastate travel exceeded the pre-COVID level in the December 2023 quarter. On the other hand, interstate travel reached its peak in the June 2022 quarter at 94 per cent of the pre-COVID levels and has tapering off since then.

It is worth noting that more Australians opted for holiday in Bali (Indonesia), Japan, Thailand, Fiji and Vietnam than 2019. Through TEQ holiday intentions studies, we understand consumers still would like to travel, but they may cut back on spend on trips and frequency of trips despite the high costing of living. Our interstate source markets might have opted for overseas holidays than a holiday in Queensland.

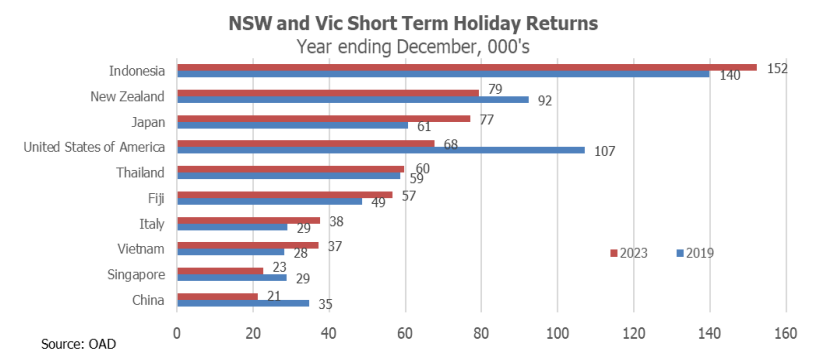
Both interstate OVE (down 3.6 per cent to \$13.1 billion) and interstate visitation (7.5 million, down 7.6 per cent) were down in Queensland. Both of these decreases were driven by the interstate holiday market. Interstate holiday OVE was down 10.8 per cent to \$8.2 billion and interstate holiday visitation was down 12.8 per cent to 3.4 million.

At the same time Queenslanders appear more willing to travel in their own state. Intrastate visitation was steady (up 0.1 per cent to 17.5 million), as was intrastate holiday visitation (up 0.6 per cent to 7.2 million). Intrastate expenditure continued to grow (up 7.0 per cent to \$15.1 billion).

In Queensland, regions like the Tropical North Queensland and the Whitsundays in particular, have been affected by the impact of increasing outbound travel. During COVID, both regions might have been perceived as substitutes of overseas beach destinations such as Bali and Fiji. With the built-up consumer confidence of travelling outbound, we saw the continuous decline in holiday nights in the TNQ and Whitsundays.

Mixed results among regions

OVE grew in most of Queensland's regions and four regions reached new records. These were Brisbane (\$7.3 billion, up 14.1 per cent), Southern Queensland Country (\$1.3 billion, up 6.5 per cent), Townsville (\$1.2 billion, up 14.0 per cent) and Mackay (\$830.2 million, up 28.6 per cent over the three-year trend).



NORTH STRADBROKE ISLAND (MINJERRIBAH), BRISBANE

Domestic Tourism Snapshot

Year ending December 2023



Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	24,992,000	-2.3%	-3.6%	10,585,000	-4.1%	5.8%
Brisbane	7,325,000	2.2%	-8.5%	2,289,000	3.4%	0.2%
Gold Coast	4,137,000	0.4%	-1.5%	2,259,000	2.2%	4.4%
Sunshine Coast	4,193,000	-0.5%	3.6%	2,587,000	5.1%	17.0%
SQC ⁷	2,548,000	-7.1%	6.3%	832,000	-11.9%	19.4%
SGBR ⁸	2,124,000	-6.4%	-8.3%	814,000	3.6%	10.7%
Townsville	1,145,000	-5.3%	-11.8%	450,000	-6.5%	11.5%
TNQ ⁹	2,285,000	-9.5%	3.0%	1,246,000	-18.6%	8.3%

	Visitors ¹	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	861,000	13.7%	469,000	18.9%
Mackay	1,111,000	5.3%	275,000	19.9%
Outback	962,000	3.9%	213,000	-3.7%
Whitsundays	724,000	8.8%	490,000	11.0%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$28,266.0m	1.8%	45.4%	100%	\$1,131
Brisbane	\$7,264.7m	14.1%	37.9%	26%	\$992
Gold Coast	\$5,479.1m	6.9%	48.5%	19%	\$1,324
Sunshine Coast	\$3,958.2m	-7.2%	44.2%	14%	\$944
SQC	\$1,348.5m	6.5%	60.5%	5%	\$529
SGBR	\$1,631.1m	2.3%	36.2%	6%	\$768
Townsville	\$1,169.4m	14.0%	48.1%	4%	\$1,022
TNQ	\$3,754.2m	-14.4%	49.7%	13%	\$1,643

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$678.0m	25.9%	2%	\$787
Mackay	\$830.2m	28.6%	3%	\$748
Outback	\$826.6m	17.9%	3%	\$860
Whitsundays	\$1,206.0m	18.3%	4%	\$1,666



SOUTHPORT, GOLD COAST

Brisbane

Domestic OVE grew by 14.1 per cent over the year to a record \$7.3 billion in the year ending December 2023. The growth over the year was mostly due to an increase in spend per visitor (up 11.6 per cent \$992), while visitation also grew slightly (up 2.2 per cent to 7.3 million). The growth in visitation was led by the return of business visitation (up 14.4 per cent to 1.8 million) in 2023. This included a record number of intrastate business visitors (772,000, up 18.4 per cent). Holiday visitation also continued to grow (up 3.4 per cent to 2.3 million), but there were slightly less people visiting friends and relatives (down 5.3 per cent to 2.8 million). The growth in visitation came from both intrastate (up 1.9 per cent to 4.2 million) and interstate (up 2.6 per cent to 3.2 million). The increase in intrastate visitation came from outside of Brisbane’s main source markets. Visitation from Brisbane largest intrastate market decreased, including interregional travel (down 3.2 per cent to 1.1 million), Southern Queensland Country (steady, down 0.1 per cent, to 704,000), Sunshine Coast (down 7.4 per cent to 629,000) and the Gold Coast (down 13.5 per cent to 491,000). Among interstate markets there was a record number of visitors from Melbourne (654,000, up 9.4 per cent) and visitation from Sydney also grew (up 10.3 per cent to 940,000) . However interstate visitation from outside of the capitals decreased, including both regional NSW (down 11.0 per cent to 746,000) and regional Victoria (down 33.4 per cent to 186,000) .

Fraser Coast

Annual OVE continued to grow over the three-year trend (up 25.9 per cent on average over the three-year trend to \$678.0 million). This growth reflects both an increase in visitation (up 13.7 per cent over three-year trend to 861,000) as well as the increase in the average spend per visitor (up 11.6 per cent over the three-years trend to \$787). The growth in visitation was due to a record number of holiday visitors (469,000, up 18.9 per cent over the three-year trend). On the other hand, the number of people visiting friends and relatives was steady (0.0 per cent change at 212,000). The growth in visitation came from the intrastate market (704,000, up 10.5 per cent over the three-year trend) and included a record number of intrastate holiday visitors (357,000, up 12.4 per cent over three-year trend). There was a record number of visitors from Brisbane (346,000, up 12.7 per cent over the three-year trend). Interstate visitation was not reportable.

Gold Coast

Domestic OVE grew steadily over the year on the Gold Coast, increasing 6.9 per cent to \$5.5 billion. This growth was due to visitors spending more on average, with average spend per visitor increasing 6.5 per cent to \$1,324 over the year. On the other hand, the number of visitors was steady over the year (up 0.4 per cent to 4.1 million). The steady overall visitation on the Gold Coast reflects the balancing of an increase in visitation from intrastate (up 9.2 per cent to 2.0 million) offset by a decrease in interstate visitors (down 6.8 per cent to 2.1 million). The increase in intrastate visitors came from Brisbane (up 9.3 per cent to 1.5 million). The decrease in interstate visitation came from across the Gold Coast’s major markets including both New South Wales (down 4.9 per cent to 1.2 million) and Victoria (down 17.7 per cent to 582,000). By purpose, there was a small increase in the number of both holiday (up 2.2 per cent to 2.3 million) and business visitors (up 1.2 per cent to 560,000) over the year, while VFR visitation was steady (down 0.6 per cent to 1.2 million).

Mackay

In Mackay, there has been strong growth in OVE to reach a new record (up 28.6 per cent over the three-year trend to \$830.2 million). This growth has been because visitors have spent more on average (average spend per visitor up 23.2 per cent over three-year trend to \$748), and there has also been an increase in the number of visitors (up 5.3 per cent over the three-year trend to 1.1 million) over this time. The growth has been due to both holiday (up 19.9 per cent over three-year trend to 275,000) and visiting friends and relatives (up 16.2 per cent over the three-year trend to 198,000) visitors. Business visitation remains the main reason to visit the region, but the number of business visitors decreased (down 3.1 per cent over the three-year trend to 534,000). By market, intrastate visitation has increased (up 3.2 per cent on average over the three-year trend), but interstate visitation was not reportable.

Outback Queensland

There has been strong domestic overnight visitor expenditure growth in Outback Queensland (up 17.9 per cent over the three-year trend to \$826.6 million). This has mostly reflected an increase in the average amount that visitors have spent (up 14.0 per cent over three-year trend to \$860). On top of this there has also been some increase in visitation (up 3.9 per cent over the three-year trend to 962,000). The growth in visitation has been among people visiting the region to visit friends and relatives (up 13.3 per cent over the three-year to trend to 205,000) or conduct business (up 7.0 per cent over the three-year trend to 476,000). The number of visitors on holidays has decreased on the other hand (down 3.7 per cent over the three-year trend to 213,000). The number of intrastate visitors has been steady (up 0.4 per cent over the three-year trend to 777,000). Among intrastate visitors though, visitation from Brisbane has grown (up 2.0 per cent over three-year trend to 212,000). With total visitation increasing, but intrastate visitation remaining steady, this implies growth from the interstate market. However, interstate visitation growth is not reportable due to small sample sizes in previous years.

Southern Great Barrier Reef

In the Southern Great Barrier Reef (SGBR) region domestic OVE grew slightly over the year (up 2.3 per cent to \$1.6 billion). The growth reflects an increase in the average amount spent by visitor (\$768, up 9.3 per cent). This increase in spend just outweighed a decrease in visitation (down 6.4 per cent to 2.1 million). The decrease in visitation was among people visiting their friends and relatives (down 11.5 per cent to 596,000) or conducting business (down 11.3 per cent to 572,000). Holiday visitation bucked this trend and continued to grow (up 3.6 per cent to 814,000). The decrease in visitation occurred across both visitors from intrastate (down 5.7 per cent to 1.9 million) and interstate (down 10.8 per cent to 254,000). Among intrastate markets, the decrease in visitation was due to visitors from Brisbane (down 34.5 per cent to 418,000). Intraregional visitation, the largest market for SGBR, continued to grow (up 5.3 per cent to 620,000).

Intrastate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	17,523,000	0.1%	-1.5%
Brisbane	4,167,000	1.9%	-6.0%
Gold Coast	2,030,000	9.2%	0.2%
Sunshine Coast	3,021,000	0.2%	3.1%
SQC	2,098,000	-7.0%	7.9%
SGBR	1,870,000	-5.7%	-7.5%
Townsville	841,000	-8.8%	-21.0%
TNQ	1,489,000	-2.6%	-0.8%

	Visitors	3-yr trend
Fraser Coast	704,000	10.5%
Mackay	998,000	3.2%
Outback	777,000	0.4%
Whitsundays	424,000	-3.2%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	7,469,000	-7.6%	-8.1%
Brisbane	3,158,000	2.6%	-11.6%
Gold Coast	2,107,000	-6.8%	-3.2%
Sunshine Coast	1,172,000	-2.3%	5.0%
SQC	450,000	-7.8%	-0.9%
SGBR	254,000	-10.8%	-13.8%
Townsville	303,000	6.3%	30.4%
TNQ	796,000	-20.1%	11.0%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	np	np
Outback	184,000	22.8%
Whitsundays	300,000	44.1%



YUNGABURRA, TROPICAL NORTH QUEENSLAND

Domestic Tourism Snapshot

Year ending December 2023



Domestic visitors by region

	Visitors	Annual change	Change vs YE Dec 2019	Holiday visitors	Annual change	Change vs YE Dec 2019
Total Queensland	24,992,000	-2.3%	-3.6%	10,585,000	-4.1%	5.8%
Brisbane	7,325,000	2.2%	-8.5%	2,289,000	3.4%	0.2%
Gold Coast	4,137,000	0.4%	-1.5%	2,259,000	2.2%	4.4%
Sunshine Coast	4,193,000	-0.5%	3.6%	2,587,000	5.1%	17.0%
SQC ⁷	2,548,000	-7.1%	6.3%	832,000	-11.9%	19.4%
SGBR ⁸	2,124,000	-6.4%	-8.3%	814,000	3.6%	10.7%
Townsville	1,145,000	-5.3%	-11.8%	450,000	-6.5%	11.5%
TNQ ⁹	2,285,000	-9.5%	3.0%	1,246,000	-18.6%	8.3%

	Visitors ¹⁰	3-yr trend	Holiday visitors	3-yr trend
Fraser Coast	861,000	13.7%	469,000	18.9%
Mackay	1,111,000	5.3%	275,000	19.9%
Outback	962,000	3.9%	213,000	-3.7%
Whitsundays	724,000	8.8%	490,000	11.0%

Expenditure in Queensland regions

	Expenditure	Annual change	Change vs YE Dec 2019	Share	Spend per visitor
Total Queensland	\$28,266.0m	1.8%	45.4%	100%	\$1,131
Brisbane	\$7,264.7m	14.1%	37.9%	26%	\$992
Gold Coast	\$5,479.1m	6.9%	48.5%	19%	\$1,324
Sunshine Coast	\$3,958.2m	-7.2%	44.2%	14%	\$944
SQC	\$1,348.5m	6.5%	60.5%	5%	\$529
SGBR	\$1,631.1m	2.3%	36.2%	6%	\$768
Townsville	\$1,169.4m	14.0%	48.1%	4%	\$1,022
TNQ	\$3,754.2m	-14.4%	49.7%	13%	\$1,643

	Expenditure	3-yr trend	Share	Spend per visitor
Fraser Coast	\$678.0m	25.9%	2%	\$787
Mackay	\$830.2m	28.6%	3%	\$748
Outback	\$826.6m	17.9%	3%	\$860
Whitsundays	\$1,206.0m	18.3%	4%	\$1,666



WINTON, OUTBACK

Southern Queensland Country (SQC)

Domestic OVE in Southern Queensland Country reached a new record (\$1.3 billion, up 6.5 per cent). This came on the back of growth in the average amount spent by visitors to the region (up 14.6 per cent to \$529), and a record number of nights (up 3.0 per cent to 7.6 million). The record came despite visitation decreasing over the year (down 7.1 per cent to 2.5 million). The decrease in visitation occurred among visitors on holidays (down 11.9 per cent to 832,000) and visiting friends and relatives (down 8.2 per cent to 986,000). On the other hand, the number of people visiting for business continued to increase (up 3.9 per cent to 578,000). Visitation was down from both intrastate (down 7.0 per cent to 2.1 million) and interstate (down 7.8 per cent to 450,000). The decrease in intrastate visitation largely reflects that there were fewer visitors from Brisbane (down 7.8 per cent to 1.0 million). On the other hand, there was a record number of intraregional visitors (501,000, up 19.6 per cent). Among the interstate markets we see that visitation from New South Wales was down 4.1 per cent to 273,000.

Sunshine Coast

Domestic OVE on the Sunshine Coast was down over the year (down 7.2 per cent to \$4.0 billion). This was due to a decrease in the average spend per visitor (down 6.7 per cent to \$944). The total number of visitors was steady over the year (down 0.5 per cent to 4.2 million). There was a record number of visitors to the region on holidays (2.6 million, up 5.1 per cent). However, this was offset by a decrease in the number of people visiting their friends and relatives (down 8.2 per cent to 1.3 million). There was also a small amount of growth in business visitors to the region (up 1.2 per cent to 235,000). Intrastate visitation was steady (up 0.2 per cent, 3.0 million), reflecting steady visitation from Brisbane (down 0.9 per cent to 2.0 million). On the other hand, visitation from interstate decreased (down 2.3 per cent to 1.2 million). Visitation from New South Wales caused the decrease in interstate visitation (down 17.6 per cent to 487,00). The decrease in visitation from New South Wales outweighed a new record for visitation from Victoria (up 11.7 per cent to 490,000).

Townsville

Townsville recorded a new record level of domestic overnight visitor expenditure (up 14.0 per cent to \$1.2 billion). This reflects a large increase in the average amount that visitors spent (up 20.3 per cent to \$1,022). The increase in spend overcame a decrease in the level of total visitation (down 5.3 per cent to 1.1 million). Less people visiting the region for holidays (down 6.5 per cent to 450,000) and to do business (down 16.5 per cent to 261,000) is the reason for lower visitation. The number of people visiting friends and relatives remained steady (up 0.6 per cent to 329,000). The decrease in visitation was entirely due to the intrastate market with intrastate visitation down 8.8 per cent to 841,000. Interstate visitation reached a new record (303,000, up 6.3 per cent).

Tropical North Queensland (TNQ)

Domestic OVE in Tropical North Queensland was down over the year (down 14.4 per cent to \$3.8 billion). This was both because there were less visitors to the region (down 9.5 per cent to 2.3 million) and these visitors shortened their length of stay average (down 0.6 nights to 5.1 nights). Because of this total nights were down 18.4 per cent over the year to 11.7 million nights. The overall decrease in OVE occurred despite visitors spending more per night on average (up 4.9 per cent on average to \$322). Cyclone Jasper affected visitation in the month of December, however visitation had been normalising following the post-COVID travel boom prior to this. Visitation remains 3 per cent higher than in 2019.

By purpose, there were less holiday visitors in the region (down 18.6 per cent to 1.2 million) as well as fewer visiting friends and relatives (down 6.3 per cent to 464,000). Business visitation did not follow this trend, with business visitation increasing (up 7.6 per cent to 450,000). By market, it has been a decrease in the number of visitors from interstate which has driven visitation lower (down 20.1 per cent to 796,000). It should be noted that interstate visitation remains 11 per cent above 2019 levels despite this most recent year on year decrease. There was a particularly large decrease in visitors from Victoria (down 27.9 per cent 328,000), with visitation from New South Wales also substantially down (down 18.1 per cent to 305,000). Intrastate visitation was slightly lower over the year (down 2.6 per cent to 1.5 million). There was growth in visitation from near-by, with intraregional travel (up 6.8 per cent to 734,000) and visitation from Townsville (up 5.9 per cent to 307,000) increasing. However, visitation from Brisbane was down substantially (down 20.4 per cent to 224,000).

Whitsundays

Whitsundays’ Domestic OVE continues to be up substantially over the three-year trend (up 18.3 per cent over the three-year trend to \$1.2 billion). Due to variability in the data due to sample sizes, a three-year trend is used analyse the Whitsundays results. This may mask some softer recent results in the region. The growth over the three-year trend reflects both an increase in the number of visitors (up 8.8 per cent over the three-year trend to 724,000) to the region and higher average spend per visitor (up 11.3 per cent over the three-year trend to \$1,666). The trend growth in visitation is driven by more holiday makers visiting the Whitsundays (up 11.0 per cent over the three-year trend to 490,000). Looking at source markets intrastate visitation has decreased a little over the three-year tend (down 3.2 per cent to 424,000). The fact total visitation has grown while intrastate visitation has decreased would suggest growth in interstate visitation. However, trend interstate visitation cannot be reported on due to small sample sizes in previous time periods.

Intrastate visitation

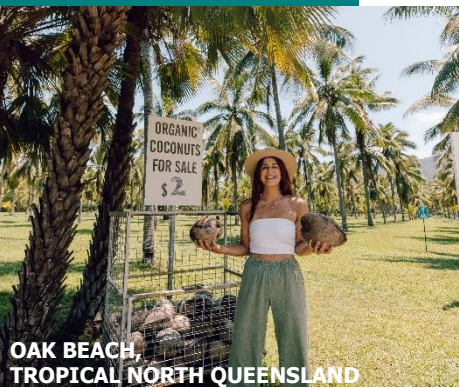
	Visitors	Annual change	Change vs YE Dec 2019
Total intrastate	17,523,000	0.1%	-1.5%
Brisbane	4,167,000	1.9%	-6.0%
Gold Coast	2,030,000	9.2%	0.2%
Sunshine Coast	3,021,000	0.2%	3.1%
SQC	2,098,000	-7.0%	7.9%
SGBR	1,870,000	-5.7%	-7.5%
Townsville	841,000	-8.8%	-21.0%
TNQ	1,489,000	-2.6%	-0.8%

	Visitors	3-yr trend
Fraser Coast	704,000	10.5%
Mackay	998,000	3.2%
Outback	777,000	0.4%
Whitsundays	424,000	-3.2%

Interstate visitation

	Visitors	Annual change	Change vs YE Dec 2019
Total interstate	7,469,000	-7.6%	-8.1%
Brisbane	3,158,000	2.6%	-11.6%
Gold Coast	2,107,000	-6.8%	-3.2%
Sunshine Coast	1,172,000	-2.3%	5.0%
SQC	450,000	-7.8%	-0.9%
SGBR	254,000	-10.8%	-13.8%
Townsville	303,000	6.3%	30.4%
TNQ	796,000	-20.1%	11.0%

	Visitors	3-yr trend
Fraser Coast	np	np
Mackay	np	np
Outback	184,000	22.8%
Whitsundays	300,000	44.1%



OAK BEACH, TROPICAL NORTH QUEENSLAND

Domestic Tourism Snapshot

Year ending December 2023



State expenditure comparison

	Expenditure	Annual change	Change vs YE Dec 2019	Share of expenditure	Spend per visitor
Total Australia	\$109,330.9m	8.0%	35.5%	100%	\$971
Queensland	\$28,266.0m	1.8%	45.4%	26%	\$1,131
New South Wales	\$30,661.9m	7.8%	29.5%	28%	\$834
Victoria	\$22,840.4m	12.6%	34.5%	21%	\$803
Other States	\$27,557.9m	11.2%	33.7%	25%	\$1,062

State visitation comparison

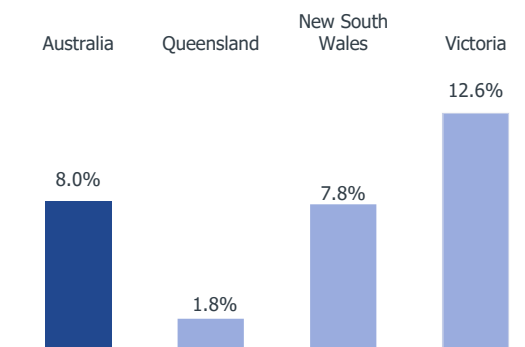
	Visitors	Annual Change	Change vs YE Dec 2019	Avg stay	Annual # change
Total Australia	112,584,000	4.0%	-4.1%	3.6	-0.1
Queensland	24,992,000	-2.3%	-3.6%	3.9	-0.2
New South Wales	36,750,000	4.6%	-5.7%	3.2	0.0
Victoria	28,459,000	8.8%	-4.3%	2.9	0.0
Other States	25,938,000	4.2%	-3.1%	4.0	-0.1

Total holiday	47,634,000	0.0%	3.0%	3.7	-0.2
Queensland	10,585,000	-4.1%	5.8%	4.3	-0.3
New South Wales	15,245,000	0.8%	3.0%	3.3	-0.1
Victoria	13,187,000	4.8%	5.9%	3.0	0.0
Other States	10,270,000	-3.6%	-2.7%	4.0	-0.3

Total VFR	37,477,000	5.5%	-6.2%	3.2	-0.1
Queensland	7,940,000	-5.2%	-11.2%	3.5	-0.2
New South Wales	13,113,000	8.7%	-6.7%	3.1	0.0
Victoria	9,757,000	12.9%	-5.1%	2.7	-0.1
Other States	7,372,000	4.0%	0.4%	3.5	0.0

Total Business	23,534,000	9.8%	-13.0%	3.6	0.0
Queensland	5,545,000	6.3%	-9.5%	3.4	-0.3
New South Wales	6,889,000	7.5%	-17.4%	2.9	0.0
Victoria	4,506,000	9.2%	-22.5%	2.9	0.1
Other States	6,972,000	13.7%	-7.4%	4.7	0.1

Annual change in visitor expenditure by state Year ending December 2023



Data Source:

The information included in this report refers to overnight visitor data extracted from the National Visitor Survey (NVS), managed by Tourism Research Australia (TRA) a federally-funded body based in Canberra. Approximately 120,000 Australian residents aged 15+ are surveyed annually using a telephone interview. The statistics included in this report depict rolling annual data and are updated each quarter. The use of rolling annual data removes seasonality from the data allowing the measurement of real growth and decline.

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

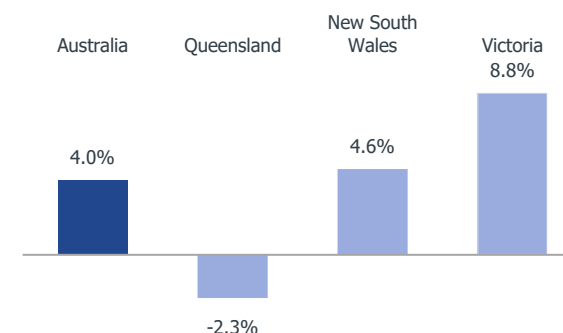
In 2019, TRA transitioned to 100 per cent mobile phone interviewing, after previously doing 50 per cent of the sample from landlines. 97 per cent of the Australian population aged 15 years or more owning a mobile phone. This change will improve the accuracy of national, state and territory estimates.

Please visit tra.gov.au for more information on the methodology, back-casting process and impact on results.

Disclaimer:

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Annual change in visitation by state, Year ending December 2023



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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International Tourism Snapshot

Year ending December 2023



International visitors to Australia

	Visitors	Change vs 2019	Avg stay ²	Change vs 2019
Total Australia³	6,640,000	-23.8%	36.5	5.0
NZ	1,147,000	-11.7%	12.3	2.3
Asia ⁴	2,941,000	-32.6%	44.2	7.1
North America ⁵	764,000	-19.2%	20.1	1.3
Europe ⁶	713,000	-19.4%	47.3	4.9
UK	561,000	-16.4%	35.1	4.6

Total holiday	3,096,000	-34.1%	19.6	1.7
NZ	461,000	-13.4%	8.2	0.9
Asia	1,314,000	-45.4%	16.8	0.9
North America	422,000	8.2%	13.0	-9.4
Europe	431,000	-28.2%	38.9	3.3
UK	300,000	-23.1%	26.5	4.1

Total VFR⁷	2,993,000	-11.6%	27.0	4.0
NZ	570,000	-3.4%	11.6	1.8
Asia	1,226,000	-16.6%	37.2	6.8
North America	304,000	-7.0%	19.5	3.5
Europe	298,000	-5.9%	24.7	5.0
UK	360,000	-15.6%	21.3	1.6

Total business	753,000	-28.5%	10.7	0.9
NZ	160,000	49.0%	6.6	-16.0
Asia	271,000	-35.8%	12.3	0.2
North America	114,000	-79.2%	10.3	-3.4
Europe	46,000	-58.0%	11.8	0.8
UK	46,000	-88.1%	10.6	-11.8

Total education	436,000	-33.3%	139.6	22.0
NZ	9,000	-40.3%	50.2	20.1
Asia	307,000	-38.0%	145.0	22.3
North America	19,000	-37.9%	75.7	6.2
Europe	19,000	-59.0%	103.6	6.7
UK	0,000	-100.0%	0.0	-81.9

Visiting Friends and Relatives leading the Way Back

Nationally, the recovery of international tourism still has a way to go until it is back to pre-COVID-19 levels. Overnight visitor expenditure (OVE) reached \$28.0 billion which is 89.1 per cent of what it was in 2019. OVE is yet to reach 2019 levels because visitation is also still recovering (6.6 million, 76.2 per cent recovered compared to 2019). At the national level, international aviation capacity (84.0 per cent recovered) is recovering faster than international visitation.

The return of international travel to Australia has followed a similar pattern to the return of domestic travel when restrictions ended, with visiting friends and relatives (VFR) returning before holiday and other purposes. VFR OVE reached a new record (\$4.9 billion, 6.6 per cent higher than 2019).

Holiday and education are the biggest sources of overnight visitor expenditure to Australia. Holiday OVE is 82 per cent recovered at \$8.7 billion and education OVE is 81.7 per cent recovered at \$10.0 billion. Business OVE is close to reaching 2019 levels (98 per cent recovered to \$2.0 billion).

As OVE is recovering faster than visitation, Australia has reached OVE records from six countries. This includes record OVE from the nation's second largest source of OVE, New Zealand (\$2.0 billion, 23 per cent higher than in 2019). The other five are Singapore; Indonesia; Canada; France and Netherlands. On the other hand, while most countries visitation is still lower than in 2019 Australia welcomed more visitors in 2023 than 2019 from South Korea (263,000, 3.4 per cent higher than 2019), and visitation from India is in line with 2019 (375,000, 99.4 per cent recovered compared to 2019).

Due to its later opening, China is the slowest of all source markets to return to 2019 levels. Since China was the largest source of both OVE and visitation in 2019 this is weighing on Australia's recovery. Chinese visitation is only recovered 38.2 per cent recovered and OVE is only 56.2 per cent recovered.

International visitor expenditure in Australia

	Expenditure	Change vs 2019
Total Australia	\$27,996.5m	-10.9%
Holiday	\$8,706.3m	-18.0%
VFR	\$4,860.4m	6.6%
Business	\$2,002.2m	-2.0%
Employment	\$1,932.5m	24.5%
Education	\$10,020.6m	-18.3%



International Tourism Snapshot

Year ending December 2023

State expenditure comparison

	Expenditure	Change vs 2019	Share of expenditure	Spend per visitor
Total Australia	\$27,996.5m	-10.9%	100.0%	\$4,217
Queensland	\$5,743.2m	-5.6%	20.5%	\$2,911
New South Wales	\$10,959.5m	-3.7%	39.1%	\$3,202
Victoria	\$6,432.3m	-27.1%	23.0%	\$3,090

State visitation comparison

	Visitors	Change vs 2019	Avg stay	Change vs 2019
Total Australia	6,640,000	-23.8%	36.5	5.0
Queensland	1,973,000	-29.1%	25.4	5.7
New South Wales	3,423,000	-21.9%	25.4	3.4
Victoria	2,082,000	-33.7%	24.4	1.2
Other States	1,609,000	-21.7%	33.4	9.4

Total holiday	3,096,000	-34.1%	19.6	1.7
Queensland	1,101,000	-41.2%	14.9	2.7
New South Wales	1,648,000	-32.7%	12.8	1.0
Victoria	965,000	-43.1%	10.8	0.3
Other States	772,000	-34.2%	16.6	3.9

Total VFR	2,993,000	-11.6%	27.0	4.0
Queensland	724,000	-4.0%	22.2	4.2
New South Wales	1,146,000	-5.4%	24.4	3.8
Victoria	800,000	-23.5%	20.3	-2.0
Other States	669,000	-7.1%	30.5	8.5

Total business	753,000	-28.5%	10.7	0.9
Queensland	175,000	-15.3%	8.0	1.1
New South Wales	350,000	-24.1%	9.6	0.9
Victoria	213,000	-37.6%	7.6	-0.8
Other States	150,000	-25.4%	11.0	0.9

Total education	436,000	-33.3%	139.6	22.0
Queensland	78,000	-34.0%	130.1	21.9
New South Wales	187,000	-24.0%	128.9	11.2
Victoria	114,000	-44.0%	148.0	32.6
Other States	65,000	-35.0%	147.1	33.6

International spend coming back quickly to Queensland

Queensland outperformed the national average in international OVE recovery, with OVE reaching \$5.7 billion. Expenditure is recovering quicker than visitation, which is 70.9 per cent recovered (2.0 million visitors), since visitors are both staying longer than they did pre-COVID-19 and spending substantially more per night. The average length of stay (ALoS) was 5.7 nights higher than 2019 at 25.4 nights and the average spend per night was 3.5 per cent higher than 2019 at \$115.

Queensland followed the national pattern of OVE recovery being led by VFR, which reached a record \$1.1 billion (up 34.3 per cent compared to 2019). In addition, Queensland also reached record level of business OVE (up 37.7 per cent to \$401.1 million) as well as employment OVE (up 61.2 per cent to \$375.9 million).

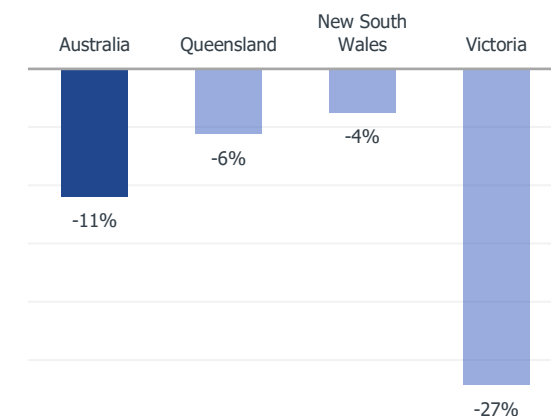
Holidays continues to be the main reason to visit Queensland in 2023r. Holiday OVE is 79.0 per cent of what it was in 2019 (at \$2.3 billion) and holiday visitation is 58.8 per cent of what it was (at 1.1 million). Education is still the second largest source of OVE (\$1.5 billion, 81.4 per cent recovered) and education visitation is 66.0 per cent recovered at 78,000.

Comparison to National performance

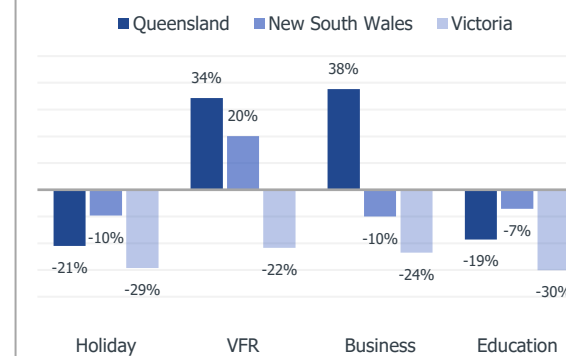
Queensland's is more advanced in its OVE recovery (94.4 per cent recovered) than the national average (89.1 per cent recovered) but is further behind than the national average in its visitation recovery. Queensland's visitation is 70.9 per cent recovered compared to the national average of 76.2 per cent recovered.

It has been Queensland's performance in the VFR and business markets which has enabled it to outperform the national average, nationally VFR OVE is up 6.6 per cent and business OVE is down 2.0 per cent. On the other hand, Queensland is a little behind the national average in terms of both holiday OVE and education OVE. Nationally holiday OVE is 82.0 per cent recovered and education OVE is 81.7 per cent recovered.

Change in Overnight Visitor Expenditure compared to 2019



Annual change OVE visitor type, by state



International Tourism Snapshot

Year ending December 2023

International visitors to Queensland

	Visitors	Change vs 2019	Avg stay	Change vs 2019
Total Queensland	1,973,000	-29.1%	25.4	5.7
NZ	434,000	-11.3%	11.1	1.4
Asia	608,000	-51.5%	34.7	12.1
North America	257,000	-15.2%	14.8	2.4
Europe	263,000	-20.4%	27.8	2.2
UK	199,000	-8.9%	24.2	5.2

Holiday	1,101,000	-41.2%	14.9	2.7
NZ	221,000	-11.5%	8.7	0.8
Asia	288,000	-68.2%	13.1	1.8
North America	165,000	-23.6%	10.8	2.8
Europe	199,000	-26.6%	21.1	0.4
UK	132,000	-8.7%	19.7	5.2

VFR	724,000	-4.0%	22.2	4.2
NZ	213,000	-4.3%	10.7	1.5
Asia	160,000	-31.7%	43.1	15.6
North America	70,000	-1.1%	14.6	1.2
Europe	43,000	-31.2%	18.6	4.3
UK	89,000	-5.6%	19.6	2.5

Business	175,000	-15.3%	8.0	1.1
NZ	35,000	-29.4%	5.1	1.0
Asia	6,000	-92.2%	6.7	-1.4
North America	21,000	-34.3%	9.9	3.0
Europe	np	np	np	np
UK	np	np	np	np

Education	78,000	-34.0%	130.1	21.9
NZ	np	np	np	np
Asia	38,000	-52.0%	129.5	14.4
North America	np	np	np	np
Europe	np	np	np	np
UK	np	np	np	np

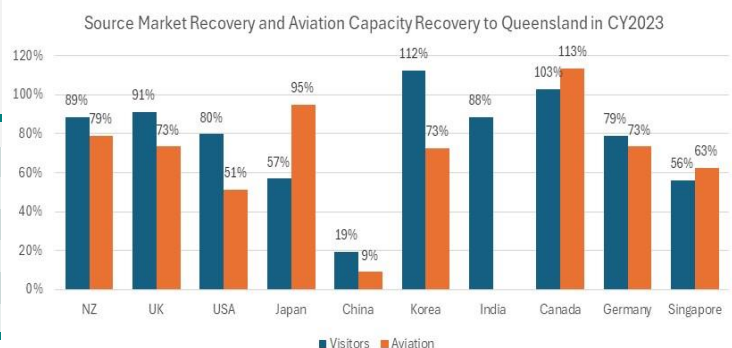
The performance of individual source markets has been mixed. OVE has recovered to pre-COVID-19 levels from three of Queensland's largest source markets. These are New Zealand (30.2 per cent higher than 2019 at \$788.1 million), United Kingdom (36.1 per cent higher than 2019 at \$466.2 million) and Japan (in line with 2019 levels, up 0.7 per cent at \$463.0 million). OVE is almost at 2019 levels from the United States of America (96.6 per cent recovered at \$404.8 million) while OVE from China is 28.5 per cent recovered at \$459.1 million. As mentioned earlier, China's slow recovery is due to the later opening of international travel from this market.

Four countries that have reached new records of OVE in Queensland, these are New Zealand, Canada, Thailand Indonesia. Most of the growth in OVE has been the result of visitors staying longer and/or spending more per night. Visitation is still below 2019 for most source markets, including all the top five. The nations where visitation is above 2019 are Canada, Thailand, South Korea and Switzerland.

Overall, Queensland's recovery in visitation (71 per cent) was in line with the recovery in aviation capacity (73 per cent). For many of the top international source markets, Queensland was able to achieve a faster recovery in visitation than aviation capacity. However, there were a few exceptions with Japanese visitation recovering at a slower rate than aviation. On the other hand, visitation recovery from the USA and Korea outpaced the recovery of direct services to these markets. While there have not been direct services from India to Queensland, we saw strong recovery of the Indiamarket, led by VFR visitors (a record 36,000 VFR visitors to Queensland in the YE December 2023).

New Zealand, Queensland's largest market post restrictions

A record \$788.1 million was spent in Queensland by New Zealanders in 2023, making it the largest source of overnight visitor expenditure. The main reason New Zealanders visit Queensland is for a holiday (221,000 visitors, 88.5 per cent recovered), however, the VFR market has recovered more swiftly (213,000 visitors, 95.7 per cent record). Both Holiday and VFR have seen strong growth in OVE, driving record spend from this market. Showing their appreciation for Queensland since travel restrictions ended visitors have increased their average length of stay by 1.4 nights to 11.1 nights.



International expenditure in Queensland

	Expenditure	Change vs 2019
Total Queensland	\$5,743.2m	-5.6%
Holiday	\$2,261.3m	-21.0%
VFR	\$1,090.7m	34.3%
Business	\$401.1m	37.7%
Employment	\$375.9m	61.2%
Education	\$1,475.9m	-18.6%

Canada, Queensland's new northern cousins

More Canadians visited Queensland than ever before in 2023 (69,000, 2.7 per cent higher than 2019) and they spent more than ever before while they have been here (\$238.0 million, 64.1 per cent higher than 2019). What is the cause for the growth from Canada? There has been an expansion of flights between Queensland and Canada with aviation capacity at 113 per cent of what it was in 2019. The main reason Canadians visit Queensland is for a holiday (41,000 visitors, 87.4 per cent recovered compared to 2019). However it has been VFR (25,000 visitors, 18.2 per cent above 2019 levels) which has led the recovery. Rather than return to their home of ice and snow Canadian's chose to enjoy Queensland's weather a little longer, increasing their average length of stay by 6.0 nights to 24.1 nights on average compared to 2019.

Thai and Indonesian visitor come to see their families

A lot of people missed loved ones while COVID-19 related restrictions were in place, and it seems this was no truer than for Thais and Indonesians with friends and family in Queensland. Although both these markets are relatively small for Queensland, both provided record levels of OVE. Thai OVE reached \$146.8 million (157.7 per cent above 2019) and Indonesian OVE reached \$115.4 billion (89.0 per cent above 2019 levels). In both cases much of the growth in OVE can be attributed to the VFR market.

Queensland says *annyeong* to South Koreans

South Korean visitation (83,000, 12.3 per cent above 2019) to Queensland is now above pre-COVID levels, as is the amount spent by Koreans in the State (\$263.7 million, 5.4 per cent above 2019 levels). Most South Korean visitors are in Queensland for a holiday (64,000, 12.2 per cent above 2019). However, the recovery in South Koreans saying *annyeong* to friends and family has been even stronger (13,000 visitors, 17.8 per cent above 2019 levels).

International Tourism Snapshot

Year ending December 2023



International visitors by region

	Visitors	Change vs 2019	Annual change	Avg stay	Holiday visitors	Change vs 2019
Total Queensland	1,973,000	-29.1%	115.3%	25.4	1,101,000	-41.2%
Brisbane	1,156,000	-21.8%	115.3%	21.6	453,000	-41.4%
Gold Coast	612,000	-43.3%	115.0%	13.5	416,000	-51.1%
TNQ	458,000	-43.4%	190.4%	11.2	396,000	-47.0%
Sunshine Coast	308,000	-6.7%	139.1%	14.4	215,000	-14.3%
Whitsundays	156,000	-29.1%	173.1%	7.3	147,000	-30.1%
SGBR ⁹	93,000	-34.2%	133.7%	18.6	63,000	-42.2%
Fraser Coast	86,000	-34.1%	148.6%	5.2	77,000	-34.0%
Townsville	112,000	-11.5%	237.8%	11.5	85,000	-18.5%

	Visitors	Change vs 2019	Trend change ¹¹	Avg stay	Holiday visitors	Change vs 2019
Mackay	33,000	-31.3%	116.8%	13.0	24,000	-34.3%
Outback Queensland	19,000	-26.0%	113.4%	26.4	11,000	-27.7%
SQC ¹⁰	45,000	-30.9%	87.6%	39.9	15,000	-40.6%

Expenditure in Queensland regions

	Expenditure	Change vs 2019	Annual change	Spend per visitor	Spend per night
Total Queensland	\$5,743.2m	-5.6%	149.9%	\$2,911	\$115
Brisbane	\$2,931.7m	1.7%	155.2%	\$2,536	\$118
Gold Coast	\$1,093.9m	-18.4%	123.4%	\$1,786	\$132
TNQ	\$831.3m	-19.1%	201.3%	\$1,817	\$162
Sunshine Coast	\$365.3m	29.3%	151.1%	\$1,186	\$82
Whitsundays	\$121.5m	-20.2%	84.9%	\$779	\$107
SGBR ⁹	\$117.8m	19.8%	301.0%	\$1,273	\$68
Fraser Coast	\$50.0m	9.6%	208.7%	\$580	\$112
Townsville	\$73.0m	-23.7%	155.2%	\$653	\$57

	Expenditure	Change vs 2019	Trend change ¹¹	Spend per visitor	Spend per night
Mackay	n/p	n/p	n/p	n/p	n/p
Outback Queensland	\$23.7m	n/p	n/p	\$1,228	\$46
SQC ¹⁰	\$114.5m	-2.0%	n/p	\$2,550	\$64

Brisbane

Overnight visitor expenditure in Brisbane reached a record \$2.9 billion (up 1.7 per cent compared to 2019). The growth in OVE was due to very strong growth in the average amount spent by visitors in the region (up 29.9 per cent compared to 2019 to \$2,536). Visitation has a fair way to go until it has recovered to 2019 levels (1.2 million visitors or 78.2 per cent of 2019 levels). In particular, it is holiday (453,000, 58.6 per cent of 2019 levels) and education (53,000, 67.1 per cent of 2019 levels) travel which are the furthest from recovery. VFR travel is the closest to pre-COVID-19 levels (442,000, 97.4 per cent of 2019 levels). Brisbane welcomed a record number of visitors from India (51,000 visitors, up 16.8 per cent vs. 2019), Canada (44,000, up 12.7 per cent vs. 2019) and Thailand (18,000, up 52.9 per cent vs 2019). South Korean visitation has also exceeded 2019 levels (48,000, up 12.6 per cent). Of Brisbane's top five markets, visitation from New Zealand, UK and the USA have all recovered to more than 90 per cent of 2019 levels. However, the recovery from China (69,000, down 75.2 per cent), is noticeably slower. India's record result means that it is also now a top five market ahead of Germany.

Gold Coast

Overnight visitor expenditure on the Gold Coast is slightly down on pre-COVID-19 levels (\$1.1 billion or 81.6 per cent of 2019 OVE). Visitation is further behind 2019 levels (612,000, 56.7 per cent recovered), but average spend per visitor has grown significantly since 2019 (up 43.9 per cent to \$1,786). By purpose, holiday visitation is furthest from reaching a full recovery (48.9 per cent of 2019 levels at 416,000), followed by education (68.6 per cent of 2019 levels at 16,000) and business (68.8 per cent of 2019 levels at 25,000). On the other hand, visiting friends and relatives is already above 90 per cent of 2019 levels (93.6 per cent of 2019 levels at 157,000). The relatively slow recovery of visitation to the Gold Coast is driven by the heavy reliance on Chinese visitation, which has been slow to return. In 2023, there were 29,000 Chinese visitors or just 10.5 per cent of 2019 levels. Visitation from Japan has also been slow to recover (30,000 or 40.5 per cent of 2019). On the other hand, The Gold Coast welcomed a record number of South Korean visitors (46,000, up 35.2 per cent), making it the region's third largest source market. Visitation from New Zealand is close to 2019 levels (200,000 or 94.4 per cent of 2019 levels).

Tropical North Queensland (TNQ)

Overnight visitor expenditure in Tropical North Queensland is 80 per cent recovered to 2019 levels (\$831.3 million or 80.9 per cent of 2019 levels) with visitation recovery further behind (458,000 or 56.6 per cent). Despite this, the average amount spent by international visitors has grown significantly compared to 2019 (\$1,817, up 42.9 per cent). Part of the reason for the slow recovery in visitation to TNQ is the reliance on China. In 2019 around one in four visitors to the region were Chinese and for 2023 Chinese visitation cannot be reported on due to small sample size. Visitation is still recovering among the other major markets such as the United States of America (84,000, 79.1 per cent of 2019), Japan (67,000, 59.5 per cent of 2019), Germany (33,000, 74.7 per cent of 2019) and New Zealand (30,000, 80.7 per cent of 2019). On the other hand, visitation from the United Kingdom exceeded 2019 levels (up 3.0 per cent to 74,000).

Fraser Coast

In the Fraser Coast region international visitor expenditure has exceeded 2019 levels (\$50.0 million, up 9.6 per cent). This is because of a large increase in the amount that visitors spend on average (up 66.3 per cent to \$580). Visitation on the other hand, is still a fair way off recovery (65.9 per cent recovered, at 86,000). Most international visitors to the Fraser Coast are on holiday (77,000, 66.0 per cent recovered). Visitation from New Zealand exceeds 2019 levels (10,000 visitors, up 15.1 per cent). Visitation from the other major source markets remains below pre-COVID-19 levels. These are the United Kingdom (19,000, 58.6 per cent recovered vs. 2019) and Mainland Europe (42,000 visitor, 64.5 per cent recovered vs. 2019).

Whitsundays

Both the number of international visitors (156,000 visitors, 70.9 per cent recovered vs. 2019) and total international visitor spend (\$121.5 million, 79.8 per cent recovered vs. 2019) have a way to go before they have recovered to pre-COVID19 levels. Spend is a little closer to recovering, since the average spend per visitor has grown since 2019 (up 12.7 per cent vs. 2019 to \$779). The majority of visitors to the region are on holiday (147,000, 69.9 per cent recovered vs. 2019). Visitation from New Zealand and the United Kingdom have already reached 2019 levels. However, visitation from North America and Continental Europe are around 80 per cent recovered.

Townsville

In Townsville overnight visitor expenditure is down compared to the pre-COVID-19 period (\$73.0 million, 76.3 per cent recovered vs 2019). This is both because visitation has not yet recovered to 2019 levels (112,000, 88.5 per cent recovered vs 2019), but also because the average spend per visitor is yet to recover (\$653, 86.2 per cent recovered compared to 2019). The number of international visitors to the region that are visiting friends and relatives is substantially higher than in 2019 (21,000, up 40.3 per cent vs. 2019). Townsville welcomed a record number of visitors from Asia (16,000, up 64.3 per cent compared to 2019) and visitation from the United Kingdom is also above pre-COVID-19 levels (24,000, up 10.1 per cent compared to 2019). On the other hand, visitation from continental Europe (44,000, 71.8 per cent recovered) and North America (12,000, 89.1 per cent recovered) has still not recovered.



International Tourism Snapshot

Year ending December 2023

Southern Great Barrier Reef (SGBR)

There was record international overnight visitor expenditure in the Southern Great Barrier Reef region (up 19.8 per cent to \$117.8 million vs. 2019). This reflects the fact that international visitors are spending a lot more on average per night (44.8 per cent higher at \$68). This increase in average expenditure is masking the fact visitation has not fully recovered in the region (recovered 65.8 per cent to 93,000). The main reason international visitors spend time in the region is for holidays (63,000 visitors, recovered 57.8 percent). Visiting friends and relatives (VFR) is the second most common reason, and VFR visitation is closer to recovering to 2019 levels (17,000 visitors, recovered 86.1 per cent). SGBR's three largest source markets are the United Kingdom (18,000, 74.9 per cent recovered), New Zealand (14,000, 84.3 per cent recovered) and Germany (11,000 or 54.0 per cent recovered).

Sunshine Coast

International visitors spent a record amount on the Sunshine Coast (\$365.5 million, up 29.3 per cent compared to 2019) in the year ending December 2023. This reflects a substantial increase in the spend per visitor compared to 2019 (\$1,186, up 38.6 per cent). Sunshine Coast is also the closest Queensland region to reaching its pre-COVID-19 international visitation levels (308,000, 93.3 per cent recovered vs 2019). This has been particularly driven by people visiting friends and relatives (83,000, up 22.9 per cent). Holiday visitation still has a little bit to go before it has fully recovered to 2019 levels (215,000, 85.7 per cent recovered vs. 2019). New Zealand is the region's largest international market, and it is quite close to recovery (79,000, 92.4 per cent recovered vs 2019). Visitation from the second largest market, the United Kingdom is already above pre-COVID-19 levels (58,000 visitors, up 4.2 per cent vs 2019). The region has welcomed a record number of visitors from Asia (46,000, up 21.1 per cent compared to 2019) and from Canada (15,000, up 26.5 per cent compared to 2019).

Note: Outback, Southern Queensland Country and Mackay growth is usually reported on a three year trend basis given large expected variability in the annual growth due to smaller sample sizes. Given no data was available for 2020-2022, we are comparing directly to 2019, caution should be taken in interpreting figures.

Southern Queensland Country (SQC)

Southern Queensland Country's international overnight visitor expenditure is almost back to 2019 levels (98.0 per cent recovered to \$114.5 million). While international visitation is still a way off 2019 levels (69.1 per cent recovered to 45,000), the average amount spent by visitors is up strongly (\$2,550, up 41.8 per cent). Visiting friends and relatives is currently the most common reason to visit the region (21,000 visitors, 84.1 per cent recovered compared to 2019), as its recovery is more progressed compared to holiday visitation 15,000 visitors (59.4 per cent recovered). Visitation from New Zealand has recovered 68.8 per cent vs. 2019 (to 10,000); visitation from Asia has recovered 57.0 per cent (to 11,000) and visitation from Europe (including the UK) has recovered 56.5 per cent (to 12,000).

Mackay

Annual international visitation to Mackay is a long way off recovery (68.7 per cent recovered vs 2019 at 33,000). Spend data is not reportable due to a small sample size. Most of international visitation to Mackay is for holiday purposes 24,000 visitors. The largest source market is Europe, including the UK, at 20,000 visitors (64.4 per cent recovered compared to 2019).

Outback

Total overnight visitor expenditure is well above 2019 levels (up 59.3 per cent to \$23.7 million, due to the more than doubling of the average spend per visitor (\$1,228, up 115.3 per cent). The recovery in overnight visitor expenditure is despite international visitation being around three quarters of what it was in 2019 (19,000 visitors, 74, per cent recovered). This is due to a strong increase in the average length of stay (up 12.2 nights on average to 26.4 nights). Most international visitors to the region are there for holiday purposes, including working holiday makers (11,000 visitors, 72.3 per cent recovered).

International visitors by region and source market

	China		Europe (excl UK)		Japan		New Zealand		North America		United Kingdom	
	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019
Total Queensland	96,000	-80.6%	263,000	-20.4%	125,000	-43.1%	434,000	-11.3%	257,000	-15.2%	199,000	-8.9%
Brisbane	69,000	-75.2%	173,000	-16.3%	38,000	-19.2%	219,000	-4.6%	142,000	-3.7%	120,000	-7.0%
Gold Coast	29,000	-89.5%	73,000	-25.2%	30,000	-59.5%	200,000	-5.6%	54,000	-17.3%	52,000	-17.8%
Sunshine Coast	n/p	np	76,000	-20.7%	n/p	np	79,000	-7.6%	29,000	-19.1%	58,000	4.2%
Fraser Coast	n/p	np	42,000	-35.5%	n/p	np	10,000	15.1%	n/p	np	19,000	-41.4%
SGBR ⁹	n/p	np	31,000	-46.2%	n/p	np	14,000	-15.7%	n/p	np	18,000	-25.1%
Whitsundays	n/p	np	65,000	-29.0%	n/p	np	10,000	3.5%	25,000	-20.3%	43,000	0.2%
TNQ	n/p	np	112,000	-29.8%	67,000	-40.5%	30,000	-19.3%	104,000	-20.5%	74,000	3.0%
Townsville	n/p	np	44,000	-28.2%	n/p	np	6,000	-51.3%	n/p	np	24,000	np

	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019	Visitors	Change vs 2019
Mackay	n/p	np	n/p	np	n/p	np	5,000	-34.9%	n/p	np	n/p	np
Outback Queensland ¹¹	n/p	np	n/p	np	n/p	np	n/p	np	n/p	np	n/p	np
SQC ^{10,11}	n/p	np	n/p	np	n/p	np	10,000	-31.2%	n/p	np	n/p	np

International Tourism Snapshot



Year ending December 2023

	Queensland				Australia			
	Visitors	Change Vs 2019	Expenditure	Change Vs 2019	Visitors	Change Vs 2019	Expenditure	Change Vs 2019
New Zealand	434,000	-11.3%	\$788.1m	30.2%	1,147,000	-11.7%	\$2,004.9m	23.0%
Total Asia	628,000	-49.8%	\$2,325.0m	-31.4%	2,941,000	-32.6%	\$15,844.6m	-22.2%
China	96,000	-80.6%	\$459.1m	-71.5%	507,000	-61.8%	\$5,811.0m	-43.8%
Japan	125,000	-43.1%	\$463.0m	0.7%	272,000	-40.6%	\$1,171.7m	-5.4%
Singapore	39,000	-43.9%	\$134.7m	-11.1%	316,000	-24.1%	\$1,178.4m	7.2%
Malaysia	29,000	-37.5%	\$111.6m	33.6%	161,000	-53.1%	\$586.6m	-39.2%
Korea	83,000	12.3%	\$263.7m	5.4%	263,000	3.4%	\$1,098.2m	2.7%
India	73,000	-11.6%	\$192.9m	28.5%	375,000	-0.6%	\$1,425.2m	12.8%
Hong Kong	29,000	-56.0%	\$145.3m	-29.6%	169,000	-40.8%	\$852.9m	-16.6%
Indonesia	27,000	-7.9%	\$115.4m	89.0%	181,000	-8.0%	\$824.7m	20.8%
Taiwan	np	np	np	np	112,000	-37.0%	\$561.7m	-20.5%
Thailand	29,000	50.8%	\$146.8m	157.7%	90,000	-4.8%	\$465.0m	15.5%
Other Asia	78,000	13.4%	\$220.9m	49.1%	495,000	13.8%	\$1,869.1m	18.6%
North America	257,000	-15.2%	\$642.8m	13.9%	764,000	-19.2%	\$2,560.2m	4.3%
USA	189,000	-20.2%	\$404.8m	-3.4%	617,000	-19.6%	\$1,964.7m	1.7%
Canada	69,000	2.7%	\$238.0m	64.1%	147,000	-17.5%	\$595.5m	13.7%
Total Europe	463,000	-15.8%	\$1,192.7m	13.2%	1,274,000	-18.1%	\$4,996.9m	-1.8%
United Kingdom	199,000	-8.9%	\$466.2m	36.1%	561,000	-16.4%	\$1,912.0m	7.3%
Germany	64,000	-21.2%	\$158.2m	-2.1%	144,000	-27.3%	\$627.5m	-9.4%
France	35,000	-27.8%	\$104.4m	21.1%	108,000	-20.4%	\$538.9m	9.8%
Scandinavia	30,000	-28.1%	\$109.2m	-3.3%	76,000	-25.8%	\$307.5m	-18.0%
Italy	21,000	-16.6%	\$50.5m	-12.2%	60,000	-17.4%	\$257.5m	-16.4%
Switzerland	16,000	4.7%	\$52.9m	82.9%	39,000	-23.0%	\$219.5m	0.7%
Netherlands	22,000	-11.2%	\$57.0m	6.9%	49,000	-20.6%	\$237.8m	8.3%
Other Europe	76,000	-20.0%	\$194.2m	-7.9%	237,000	-10.0%	\$896.2m	-10.7%
Other markets	191,000	1.1%	\$794.6m	68.3%	514,000	-5.3%	\$2,589.9m	36.2%
All markets	1,973,000	-29.1%	\$5,743.2m	-5.6%	6,640,000	-23.8%	\$27,996.5m	-10.9%

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 expressed in nights
3. Total includes those visitors classified as 'Other'. Therefore, the sum of Holiday, VFR, Business and Education visitors may not equal to 'Total'
4. Asia includes Japan, China, Korea, Singapore, Malaysia, Hong Kong, India, Indonesia, Taiwan, Thailand and Other Asia
5. North America includes United States of America and Canada
6. Europe includes Germany, France, Scandinavia, Netherlands, Italy, Switzerland and Other Europe
7. Visiting friends or relatives (VFR)
8. All expenditure figures include package expenditure
9. SGBR - Southern Great Barrier Reef region is comprised of the Capricorn, Bundaberg and Gladstone regions
10. SQC - Southern Queensland Country region is comprised of Toowoomba, Southern and Western Downs regions
11. To stabilise some results, trend is used to average data over three years. Trend change is the average change over three years rather than a year on year comparison

Other notes:

- Expenditure estimates should be used with caution
- "n/p" = not published for technical reasons
- For this publication data has been adjusted to conform to Tourism and Events Queensland's regional definitions, which may differ slightly from ABS Tourism Regions

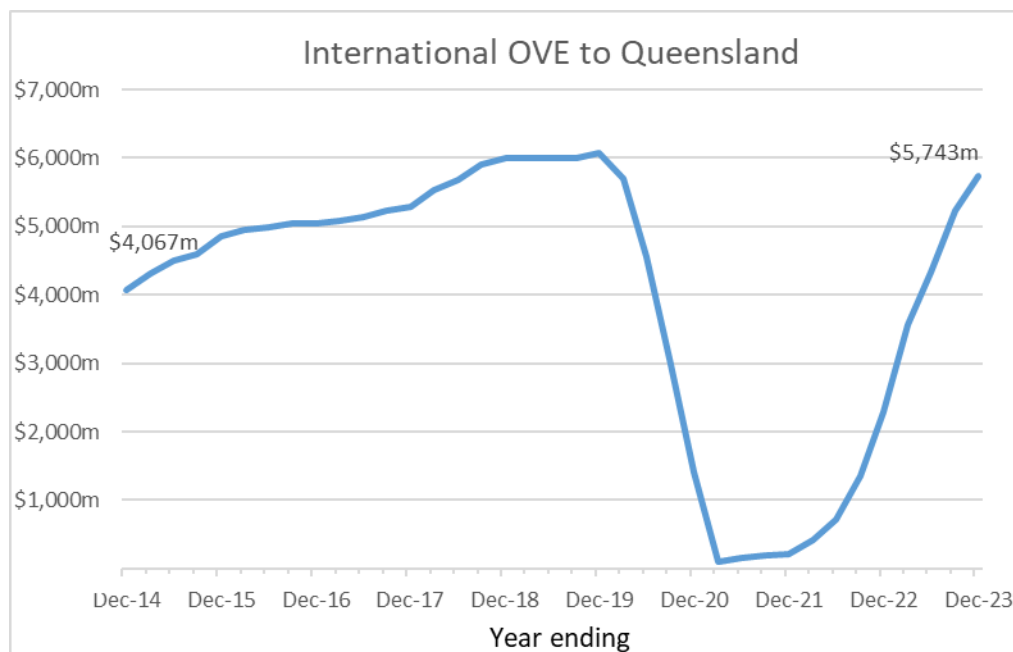
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Data Source:
International Visitor Survey (IVS), Tourism Research Australia. The information included in this report was extracted from the IVS conducted Tourism Research Australia (TRA). IVS information is collected by personal interviews with short-term international visitors to Australia in the departure lounges at eight Australian airports prior to departure. The IVS is weighted to total figures supplied by the Australian Bureau of Statistics' Overseas Arrivals and Departures and does not include persons aged under 15 years.

Disclaimer:
By using this information you acknowledge that this information is provided by Tourism and Events Queensland (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 the 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.

Attachment 5: 10-Year View – Queensland visitation and expenditure

Graph 1.

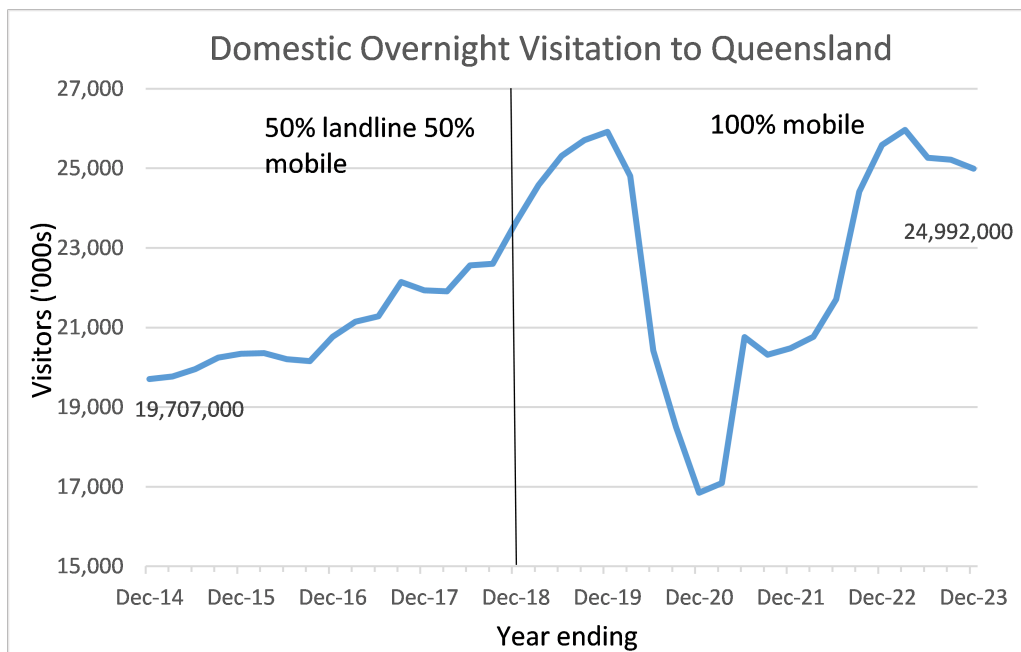


Graph 2.

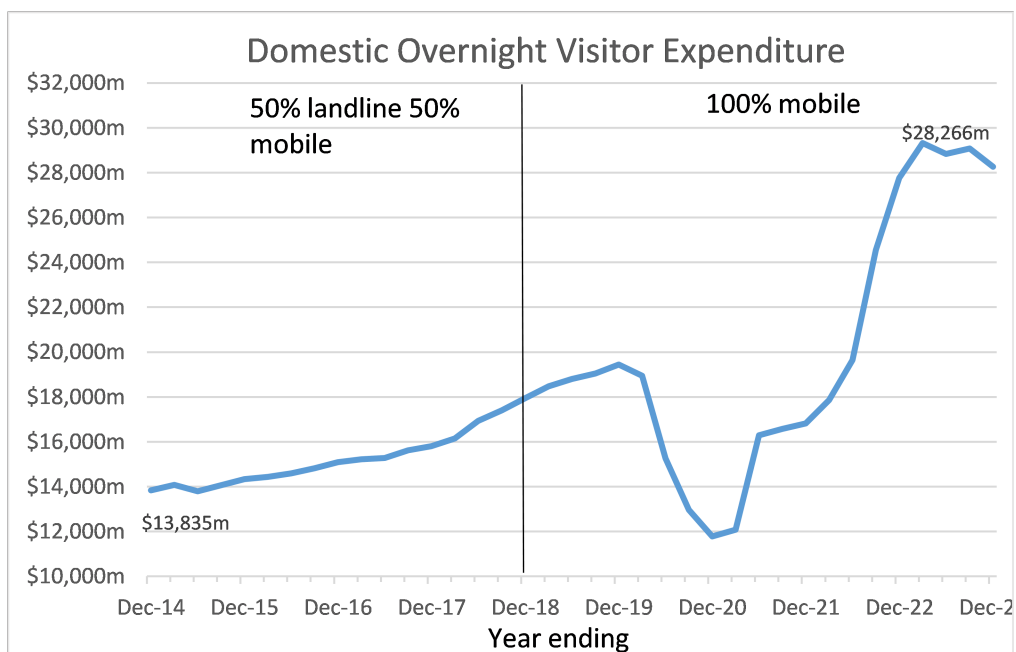


Graphs 1 and 2 show that in the year ending March 2020, international visitation and OVE experienced its largest drop since the beginning of the IVS survey. The year ending December 2023 data has been the eighth quarter of improvement since borders reopened in January 2022.

Graph 3.



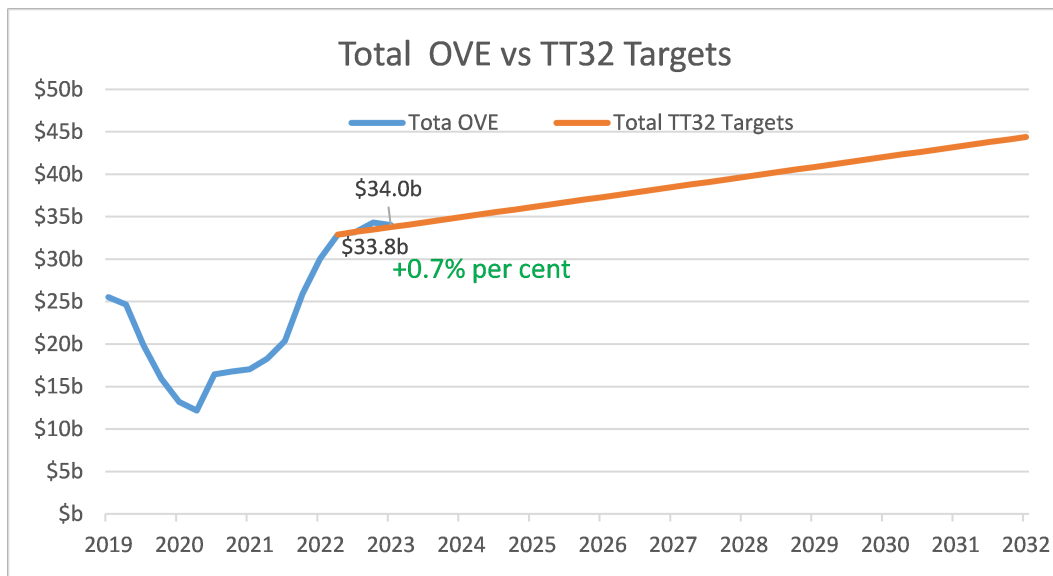
Graph 4.



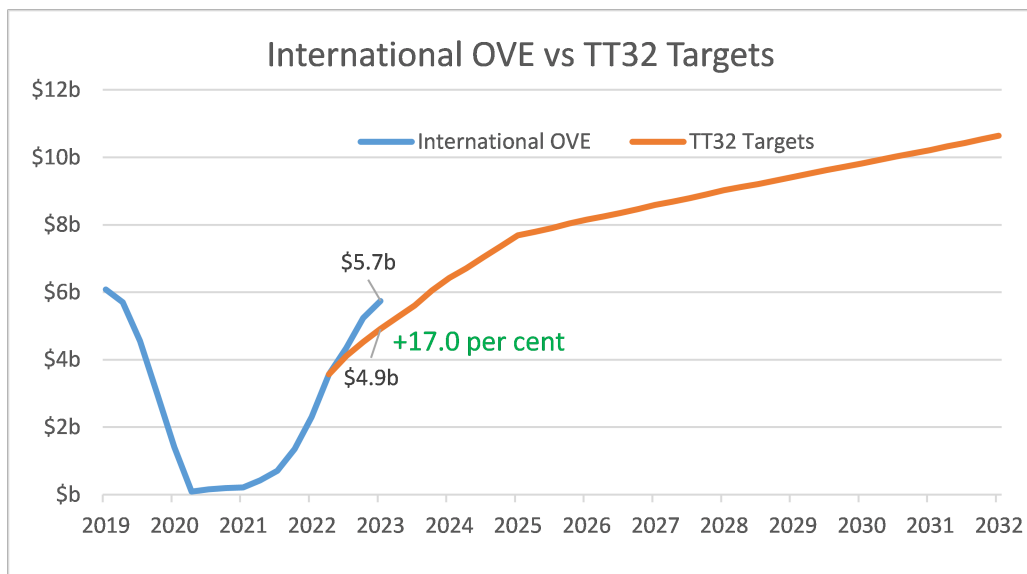
Graphs 3 and 4 show that domestic visitation has ticked down for the third quarter in a row after almost two years of growth and exceeding reaching pre-COVID-19 levels. Graph 4 shows that this has also caused domestic overnight visitor expenditure to decrease over the past three quarters.

Attachment 6: Queensland OVE vs Towards Tourism 2032 (TT32) Target

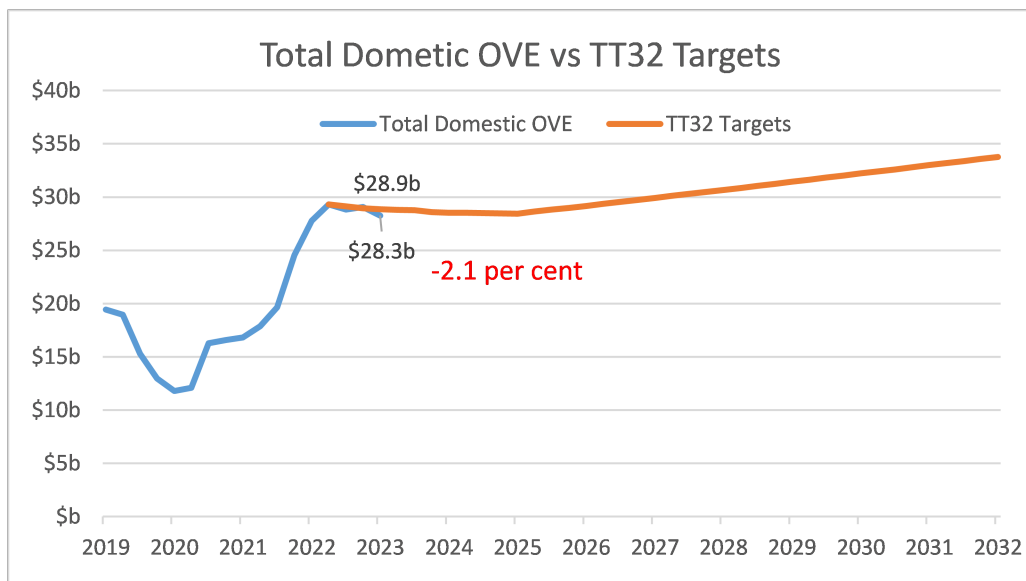
Graph 1. Total OVE



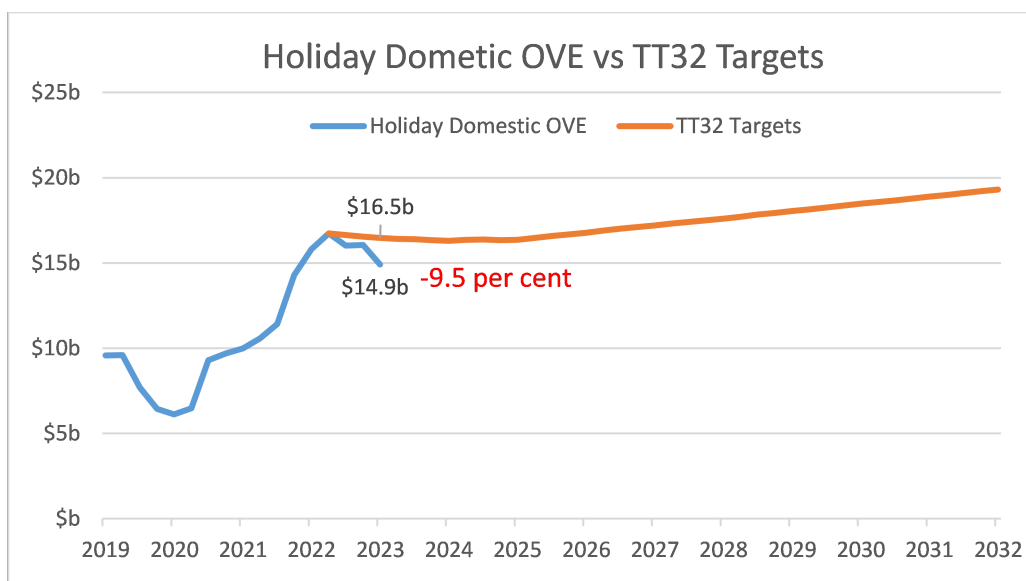
Graph 2. International OVE



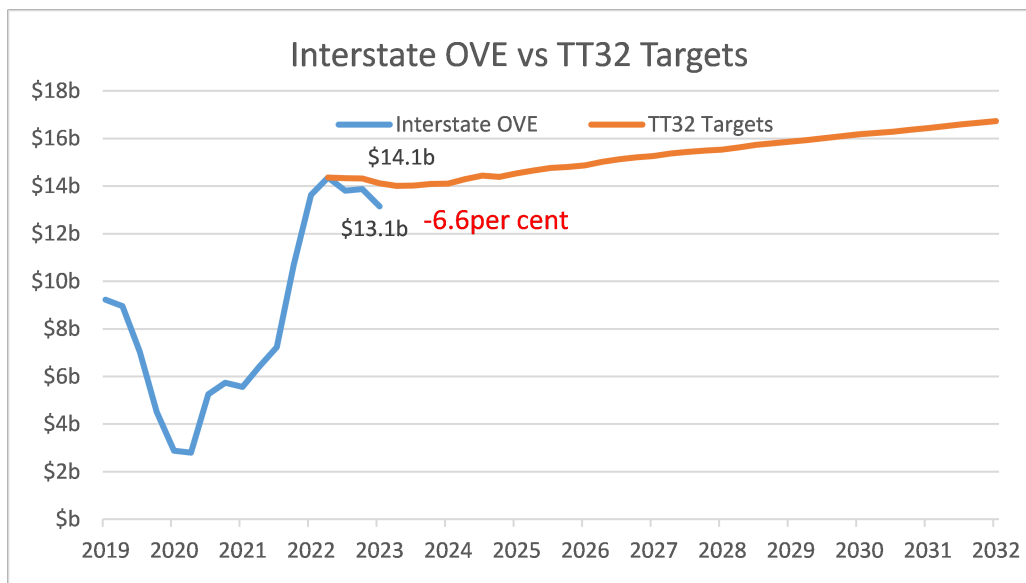
Graph 3. Domestic OVE



Graph 4. Domestic Holiday OVE



Graph 5. Interstate OVE



Graph 6. Intrastate OVE

