

# Travel Expenditure by Domestic and International Visitors

## Year ended December 2009

### Domestic Overnight Visitor Expenditure<sup>1</sup>

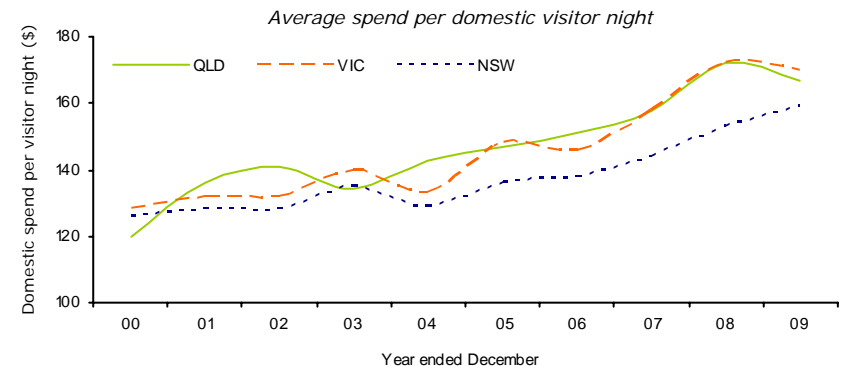
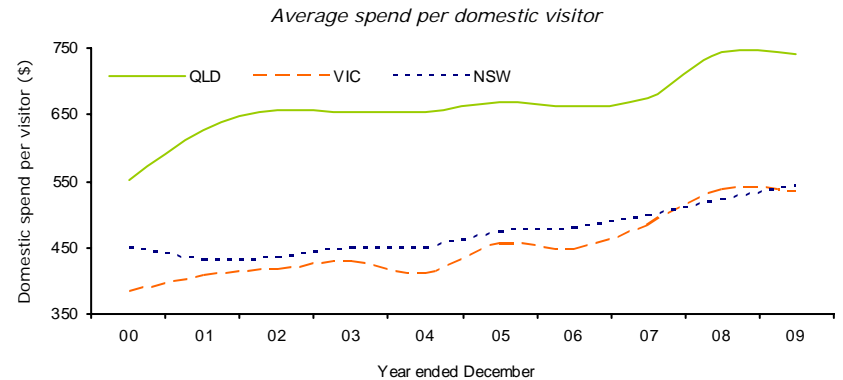
Domestic Expenditure to Australian States and Territories				
State or territory	Expenditure \$Million 2009	Annual % change	% of expenditure to Australia <sup>2</sup>	Change in Share (percentage points)
NSW	12,245	-2%	29%	0.8
QLD	11,656	-6%	28%	-0.3
VIC	8,395	-6%	20%	-0.3
WA	3,482	-15%	8%	-1.0
SA	2,992	4%	7%	0.6
TAS	1,466	-2%	3%	0.1
NT	1,346	10%	3%	0.4
ACT	784	-21%	2%	-0.4
<b>Total Australia</b>	<b>42,369</b>	<b>-5%</b>	<b>-</b>	<b>-</b>

### Domestic Overnight Visitor Expenditure in Australia

- In 2009 domestic overnight visitor expenditure in Australia totalled \$42.4 billion, a decline of 5% from 2008. The uncertain economic climate that was present for much of 2009 has contributed to Australian's being more cautious with their spending on travel.
- On a state level, Queensland, Victoria, and New South Wales all saw declines in domestic visitor expenditure. However, Queensland saw a significant decline in business visitor expenditure, and thus lost share of visitor expenditure.
- Many regions throughout Australia experienced declines in domestic visitor expenditure in 2009. Melbourne (-8%), Perth (-17%), and Brisbane (-21%), were amongst the regions that saw some of the more significant declines.

### Domestic Overnight Visitor Expenditure in Queensland

- Domestic overnight visitor expenditure in Queensland totalled \$11.7 billion in 2009, a decline of 6% compared with the level achieved in 2008.
- The healthy growth that Queensland had experienced in spend per visitor reached a plateau in 2009. However, the state's spend per visitor remains above New South Wales and Victoria.
- The slight decline in spend per night in Queensland points to the more economical mindset of many travellers. Further evidence of this are the accommodation choices of travellers while they are in Queensland, with the popularity of the more affordable accommodation options such as caravanning/camping and rented houses/units growing.



# Travel Expenditure by Domestic and International Visitors

## Year ended December 2009

### Domestic Overnight Visitor Expenditure in Queensland Regions<sup>3</sup>

Domestic Expenditure to Queensland regions				
Region	Expenditure \$Million 2009	Annual % change	% of expenditure to Queensland	Change in Share (percentage points)
Gold Coast	2,851	-5%	24%	0.3
Brisbane	2,200	-21%	19%	-3.5
Sunshine Coast	1,806	0%	15%	0.9
Tropical North Queensland	1,741	23%	15%	3.6
Fitzroy	603	n/p	5%	1.3
<b>Total QLD</b>	<b>11,656</b>	<b>-6%</b>	<b>-</b>	<b>-</b>

#### Tropical North Queensland

- In 2009, domestic overnight visitor expenditure in Tropical North Queensland (TNQ) totalled \$1.7 billion; 15% of total domestic expenditure in Queensland. Domestic expenditure in TNQ increased by 23% during 2009, with an increase in domestic visitors a key influence on the expenditure result.
- More specifically, it was the growth in interstate holiday visitors, and intrastate business visitors that assisted the expenditure result.
- All expenditure measures for TNQ increased with the region experiencing a notable increase in both spend per visitor, and spend per night.

### Domestic Overnight Visitor Expenditure in Queensland regions

#### Gold Coast

▪ Domestic overnight visitor expenditure on the Gold Coast totalled \$2.9 billion in the year ended December 2009. The number of overnight domestic visitors declined in 2009 which drove the total expenditure downturn.

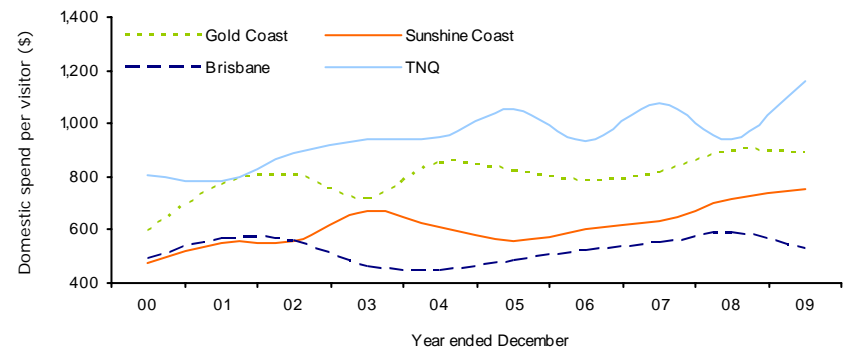
#### Brisbane

▪ In year ended December 2009, domestic overnight visitor expenditure in Brisbane totalled \$2.2 billion. Brisbane saw a decline in visitors, and visitor nights spent in the region, with this contributing to the expenditure decline.

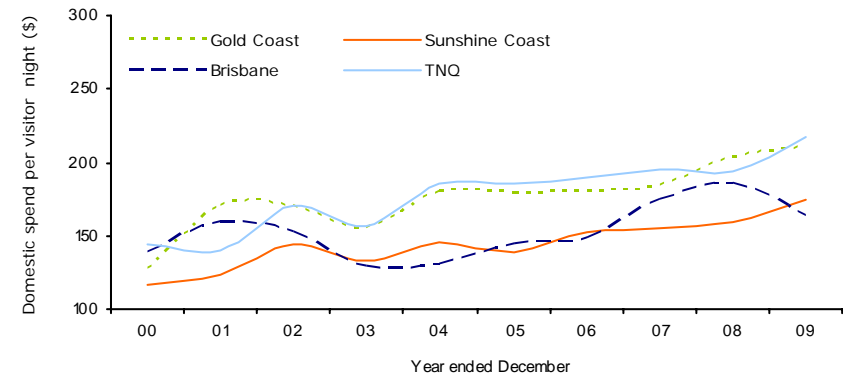
#### Sunshine Coast

▪ Domestic overnight visitor expenditure on the Sunshine Coast totalled \$1.8 billion in year ended December 2009. Whilst the Sunshine Coast saw an increase in visitor nights, overall there were fewer visitors; these contrasting movements resulting in no change in expenditure.

Average spend per domestic visitor



Average spend per domestic visitor night



# Travel Expenditure by Domestic and International Visitors

## Year ended December 2009

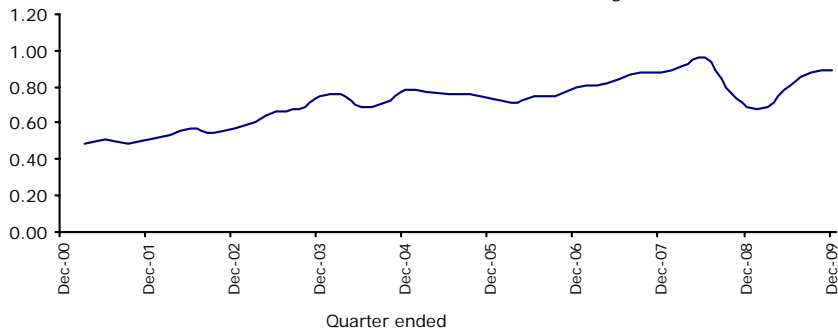
### International Visitor Expenditure<sup>4</sup>

International Expenditure to Australian States and Territories				
State or territory	Expenditure \$Million 2009	Annual % change	% of expenditure to Australia	Change in Share (percentage points)
NSW	6,097	1%	36%	-0.7
QLD	3,883	-4%	23%	-1.6
VIC	3,757	9%	22%	1.3
WA	1,759	1%	10%	-0.2
SA	659	23%	4%	0.6
NT	451	8%	3%	0.1
TAS	274	13%	2%	0.1
ACT	232	17%	1%	0.2
<b>Total Australia</b>	<b>17,112</b>	<b>3%</b>	<b>-</b>	<b>-</b>

### International Visitor Expenditure in Australia

- In 2009, international visitor expenditure in Australia totalled \$17.1 billion (including \$855 million in package expenditure); an increase of 3% on 2008. The average spend per visitor increased (up \$76) while the average spend per night declined.
- A key driver of the increase in international expenditure was the growth in international visitors' length of stay in Australia.
- Throughout 2009 the Australian dollar gradually appreciated against many of our key source market currencies, thus reducing Australia's price competitiveness.

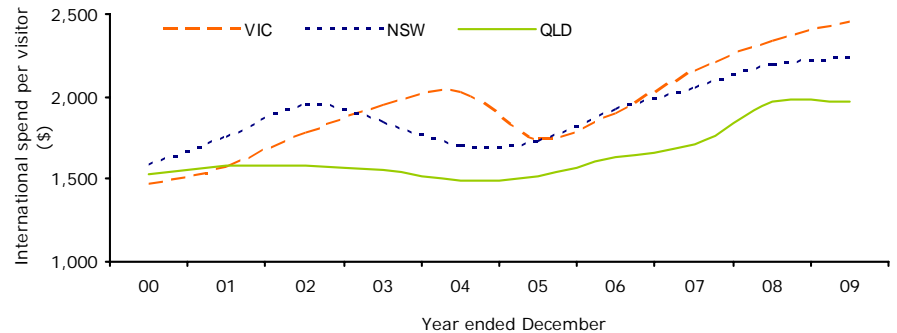
Australian Dollar/United States Dollar Exchange Rate<sup>5</sup>



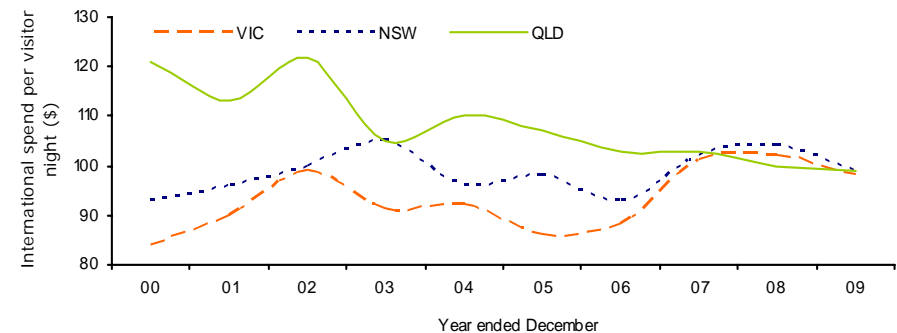
### International Visitor Expenditure in Queensland

- In 2009, international expenditure in Queensland totalled \$3.9 billion (including \$329 million in package expenditure). This represented a decline of 4% on 2008 expenditure levels.
- The decline was driven by reduced expenditure by VFR (visiting friends or relatives) and education visitors. Expenditure by Queensland's largest international market (holiday) declined by a more marginal 1%. New South Wales too saw a 1% decline in holiday visitors expenditure, while Victoria recorded a 4% decline.

Average spend per international visitor



Average spend per international visitor night



# Travel Expenditure by Domestic and International Visitors

## Year ended December 2009

### International Visitor Expenditure in Queensland Regions

International Expenditure to Queensland regions				
Region	Expenditure \$Million 2009	Annual % change	% of expenditure to Queensland	Change in Share (percentage points)
Brisbane	1,341	-6%	35%	-0.6
Gold Coast	1,012	0%	26%	1.2
Tropical North Queensland	813	-19%	21%	-3.9
Sunshine Coast	222	20%	6%	1.2
Whitsundays	156	16%	4%	0.7
<b>Total QLD</b>	<b>3,883</b>	<b>-4%</b>	<b>-</b>	<b>-</b>

### International Visitor Expenditure in Queensland regions

#### Brisbane

■ In 2009, international visitor expenditure in Brisbane totalled \$1.3 billion, and represented 35% of the total international expenditure in Queensland. International visitor expenditure declined by 6%. Brisbane experienced a decline in visitor nights spent in the region in 2009, with this contributing to the expenditure decline.

#### Gold Coast

■ International visitor expenditure on the Gold Coast totalled \$1 billion in 2009, and remained steady over the year to December 2009. The Gold Coast saw growth in visitation from a range of source markets in 2009, however visitors from the regions largest source market (New Zealand) declined, with this likely offsetting any expenditure increases from those markets that increased their visitation.

#### Tropical North Queensland

■ In 2009, international visitor expenditure in TNQ totalled \$813 million, declining by 19% from 2008. The decline in Japanese visitation was a key driver of the reduction in expenditure seen in Tropical North Queensland in 2009.

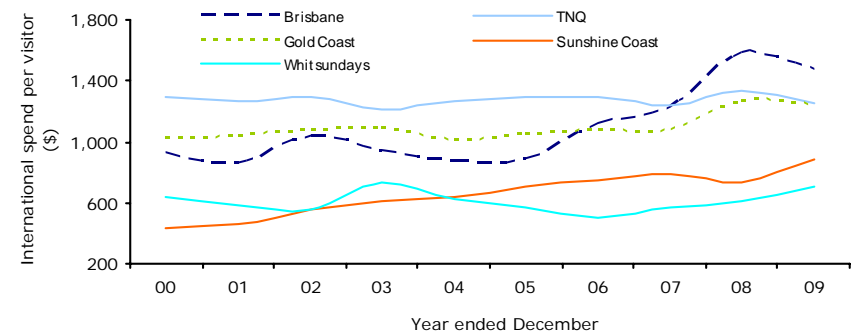
#### Sunshine Coast

■ International visitor expenditure on the Sunshine Coast totalled \$222 million in 2009; which represents a 20% increase on the previous year. Increases in the number of international visitor nights spent in the region influenced this result.

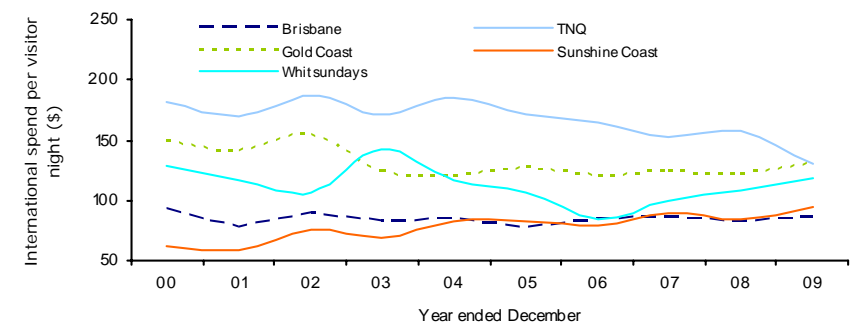
#### Whitsundays

■ International visitor expenditure in the Whitsundays totalled \$156 million in 2009, an increase of 16% on 2008. The Whitsundays recorded an increase in international visitors and visitor nights in 2009, with a plethora of source markets boosting their travel to the region. This growth in visitation was a key driver of the expenditure growth.

Average spend per international visitor



Average spend per international visitor night



# Travel Expenditure by Domestic and International Visitors

## Year ended December 2009

### International Visitor Expenditure in Queensland by source markets

Country of Origin	Expenditure \$ million 2009	Annual % change	\$ Spend per visitor 2009	Annual \$ change
New Zealand	531	-8%	1,335	-85
United Kingdom	466	0%	1,886	34
Japan	371	-19%	1,809	113
Other Countries	302	-15%	2,092	-407
China	287	35%	1,877	265
United States of America	285	8%	1,813	167
Korea	234	21%	3,755	997
Other Europe	190	-16%	2,610	61
Germany	178	2%	2,184	-69
Taiwan	139	30%	2,766	217
Canada	128	16%	2,505	515
Scandinavia	104	-13%	2,568	-300
France	98	26%	2,241	-42
Singapore	88	4%	2,051	137
Hong Kong	79	-42%	2,064	-1,433
Malaysia	75	-16%	1,833	-338
India	73	-18%	2,732	-91
Switzerland	58	9%	2,952	-70
Netherlands	52	-12%	2,194	-107
Other Asia	49	-46%	2,329	-1,271
Italy	48	-4%	1,938	93
Indonesia	23	-12%	1,467	-413
Thailand	22	-24%	2,843	57
<b>Total QLD</b>	<b>3,883</b>	<b>-4%</b>	<b>1,973</b>	<b>-3</b>

▪ The New Zealand market continued to represent the largest source of international visitor expenditure in Queensland. The decline in New Zealand holiday visitors contributed to the overall decline in expenditure.

▪ A decline in holiday visitors also influenced the decline in Japanese visitor expenditure. Holiday visitors from Hong Kong in contrast increased. However, there was a significant decline in the number of nights education visitors from Hong Kong spent in the state, with this a driver of the decrease in expenditure by Hong Kong visitors.

▪ Positively though, expenditure from the United Kingdom (Queensland's second largest source of international visitors) remained stable.

▪ Additionally, there were a number of key source markets that increased their expenditure on trips to Queensland. France, the United States of America, and China all increased their expenditure.

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#### Source:

Tourism Research Australia (TRA) conducts the National Visitor Survey (NVS) and the International Visitor Survey (IVS), which provide information on domestic and international travel activity at a regional level. Part of this information includes expenditure information from domestic day, domestic overnight and international visitors. TRA has used a model based approach to derive regional expenditure estimates for domestic day, domestic overnight and international visitors for 2009.

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1. Expenditure includes airfares and long distance transport costs.
  2. Percentage share of visitors may sum to more than 100%, as visitors may travel to more than one state or region.
  3. Data not available for some regions due to sampling variability. Expenditure estimates for these regions need to be interpreted with caution.
  4. Expenditure includes package expenditure
  5. Reserve Bank of Australia, Reserve Bank Bulletin.
- n/p Not publishable