

# Regional Tourism

Trends and Lessons



*Queensland*  
**Country**



# Situation Analysis

## Visitor Spend is Significant

In terms of Queensland Country's visitor expenditure, the economic contribution for the region, and for Queensland is significant, ranking on par with the Whitsundays, behind major tourism hubs of Brisbane, Gold Coast, Tropical North Queensland and the Sunshine Coast, and double that of Outback Queensland.

Overall, this positioning underscores Queensland Country's importance in Queensland's tourism economy, ranked well ahead of other regional Queensland destinations, showcasing its appeal and the economic benefits derived from tourism activities in the region.



# Visitor Economy Snapshot



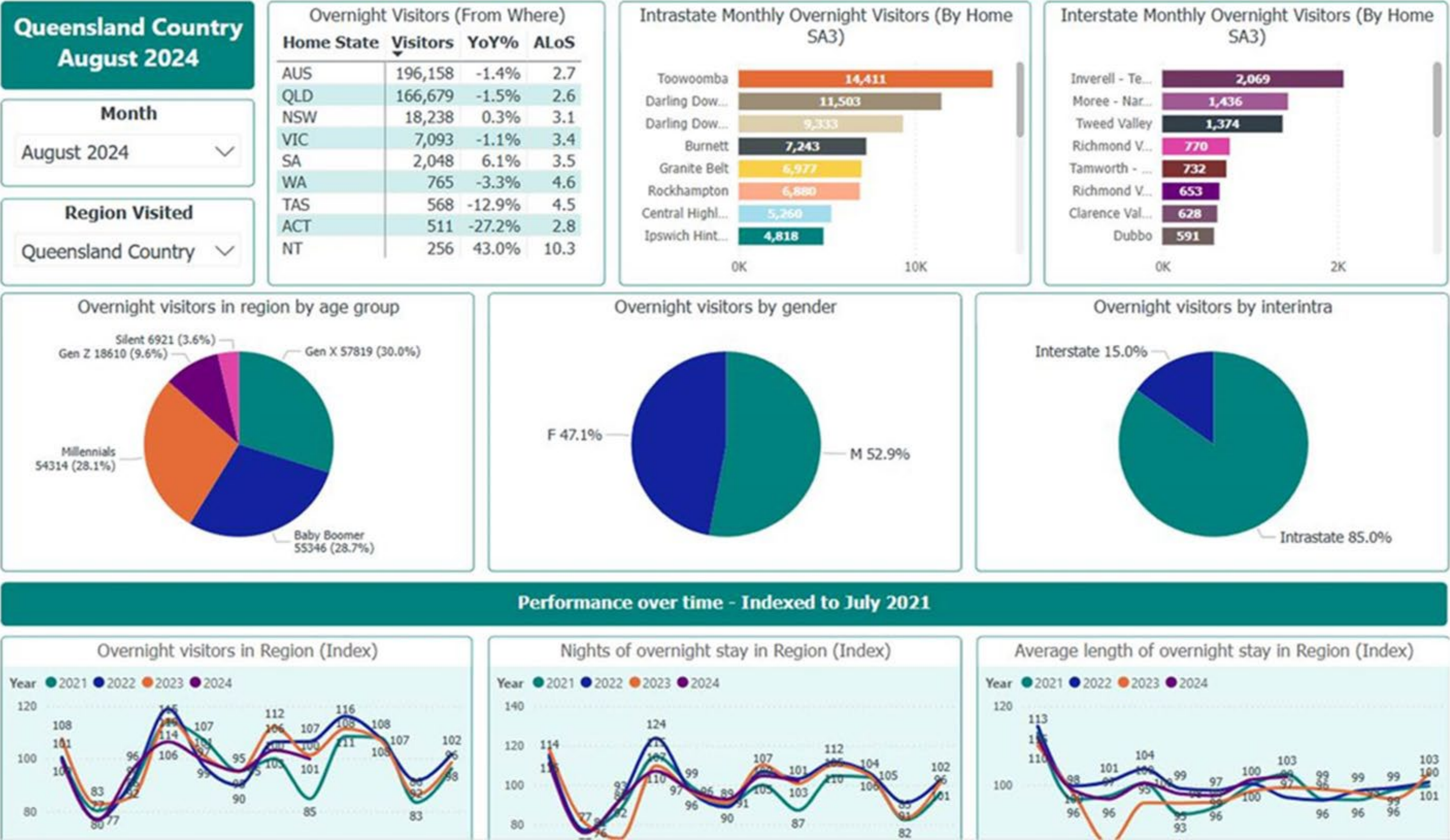
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# Regional Domestic Mobility



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# Overnight Visitors to Queensland Country



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# Visitor Nights to Queensland



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# Domestic Expenditure in Queensland Regions

| Queensland         | \$28,506.4m |
|--------------------|-------------|
| Brisbane           | \$7,521.9m  |
| Gold Coast         | \$5,374.3m  |
| Sunshine Coast     | \$3,817.4m  |
| Queensland Country | \$1,641.5m  |
| SGBR               | \$1,481.5m  |
| Townsville         | \$1,176.2m  |
| TNQ                | \$3,719.1m  |



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# Domestic overnight visitors within Australia

| Total Australia* <sup>3</sup> | 113,757,000 | 2.1% | - 3.1%  | 3.5 | - 0.1 |
|-------------------------------|-------------|------|---------|-----|-------|
| Holiday                       | 48,590,000  | 1.2% | 5.1%    | 3.6 | - 0.2 |
| VFR* <sup>4</sup>             | 37,246,000  | 1.3% | - 6.8%  | 3.2 | 0.0   |
| Business                      | 23,909,000  | 5.4% | - 11.6% | 3.5 | - 0.1 |

1. Annual change refers to the % change between the year covered by this snapshot compared to the year prior.

2. Avg Stay = Average length of stay.

3. Total Australia includes visitors classified as 'Other/Transit', i.e., not allocated to a state/territory.

4.. VFR = Visiting friends or relatives

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# Domestic visitors by region

| Total Queensland   | 25,588,000 | 1.3%   |
|--------------------|------------|--------|
| Brisbane           | 7,549,000  | 4.7%   |
| Gold Coast         | 4,158,000  | -3.8%  |
| Sunshine Coast     | 4,261,000  | 9.7%   |
| Queensland Country | 3,007,000  | 2.3%   |
| SGBR*              | 1,827,000  | -5.2%  |
| Townsville         | 1,320,000  | 22.7%  |
| TNQ*               | 2,202,000  | -13.3% |

1. SGBR = Southern Queensland Barrier Reef.

2. TNQ = Tropical North Queensland.

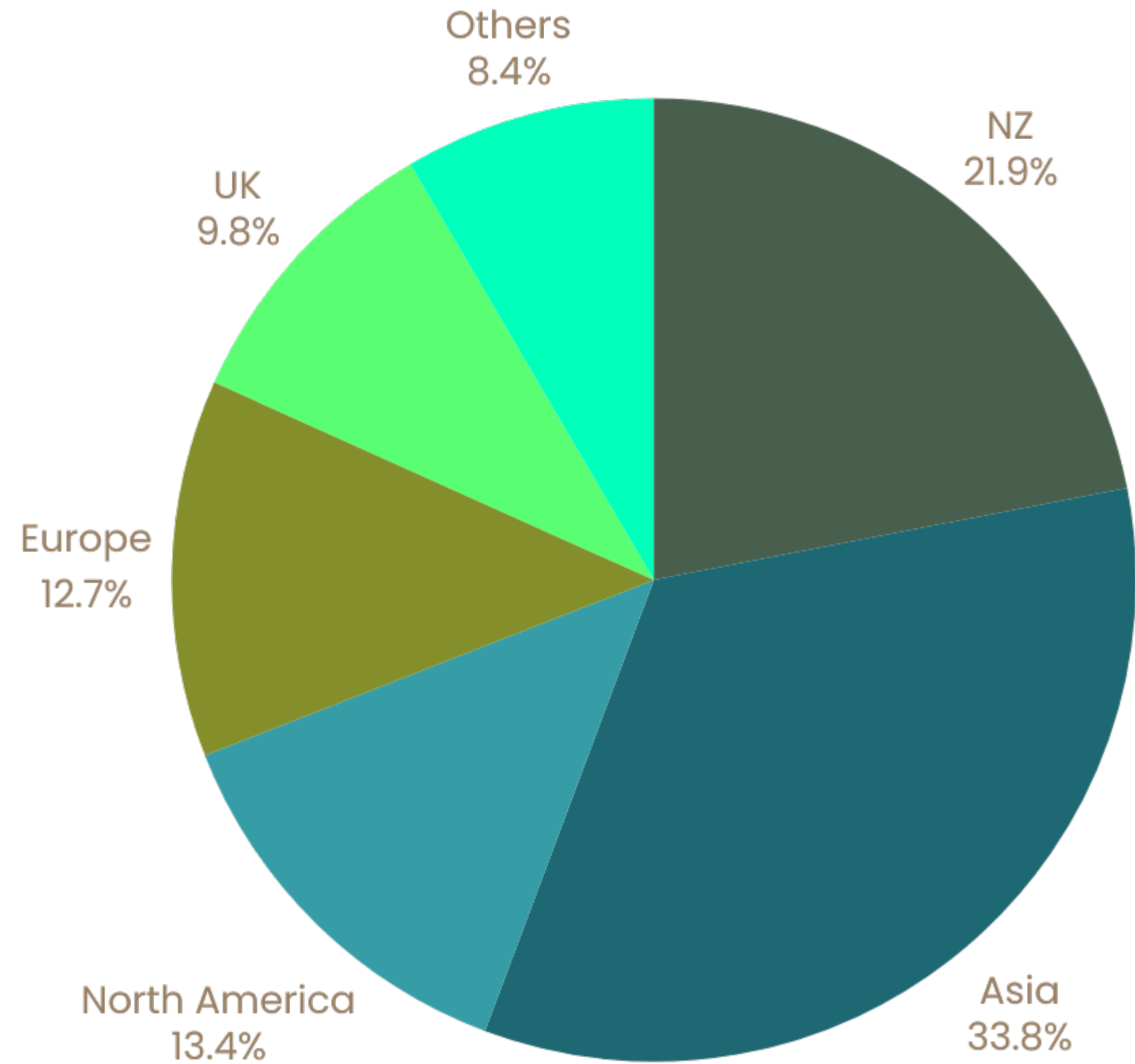
1

2

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# International visitors to Queensland

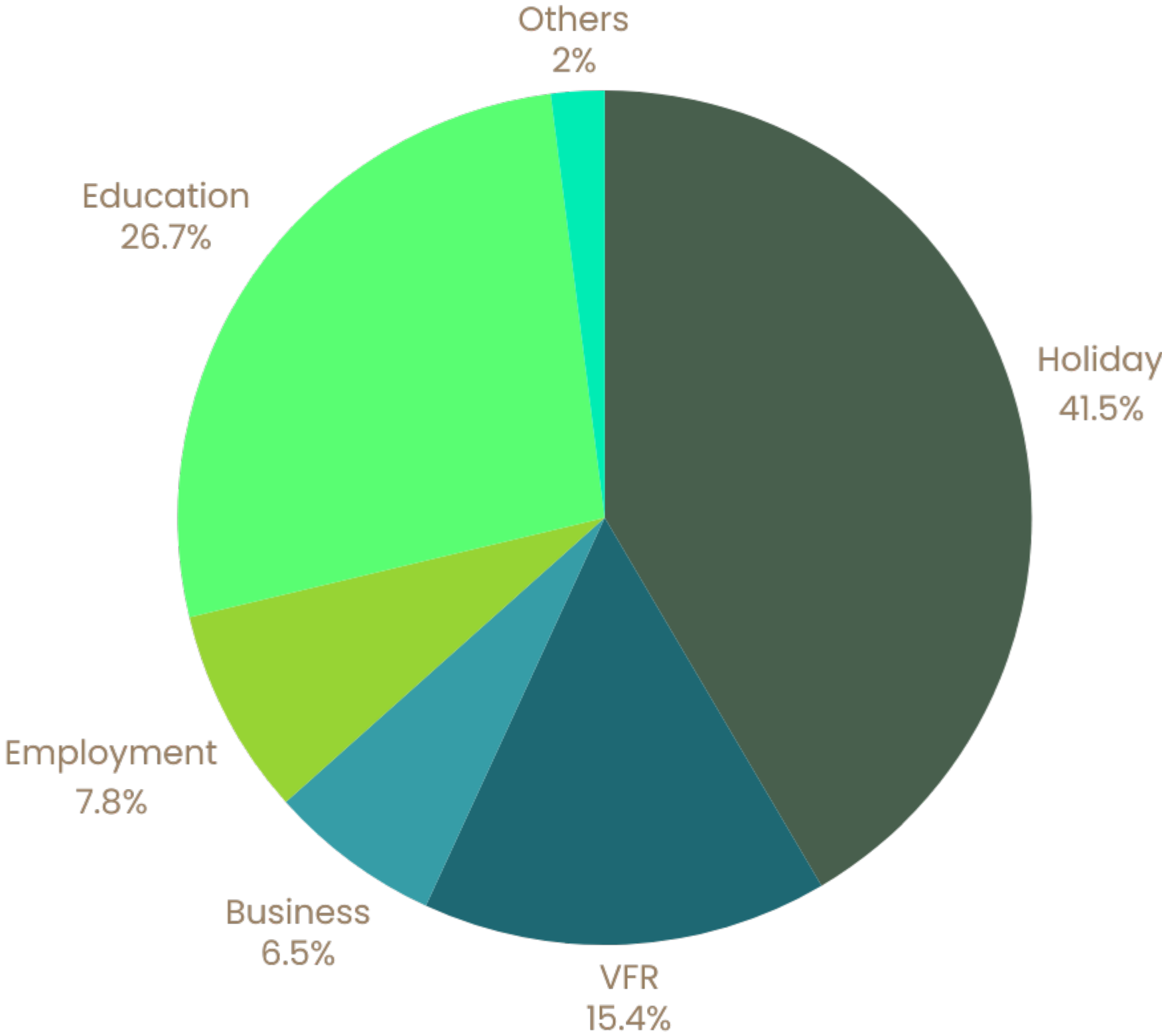
|                         |                  |
|-------------------------|------------------|
|                         |                  |
| NZ                      | 466,000          |
| Asia                    | 717,000          |
| North America           | 284,000          |
| Europe                  | 269,000          |
| UK                      | 209,000          |
| Other                   | 179,000          |
| <b>Total Queensland</b> | <b>2,124,000</b> |



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# International expenditure in Queensland

|                         |                   |
|-------------------------|-------------------|
|                         |                   |
| Holiday                 | \$2,556.3m        |
| VFR                     | \$945.2m          |
| Business                | \$402.7m          |
| Employment              | \$482.4m          |
| Education               | \$1,645.4m        |
| Other                   | \$124.5m          |
| <b>Total Queensland</b> | <b>\$6,156.5m</b> |



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# Australia

## How many visitors come to Australia?



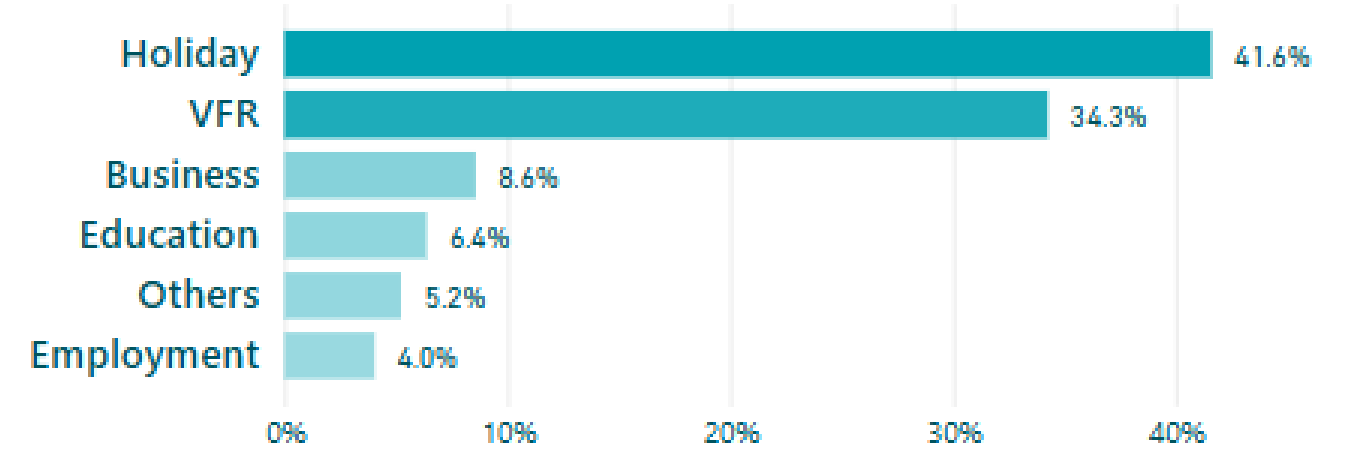
8,000,000

Visitors to Australia\*

29.96%

Year on year\*

### Purpose of visit



## How many of them are first time visitors?\*



## How much do they spend?



\$ 5,197.6 M

Total spend

38.5%

Year on year



\$6,497

Average spend per trip

\$172

Average spend per night

## How long do they stay?



38

Nights stayed on average

2

Average number of stopovers

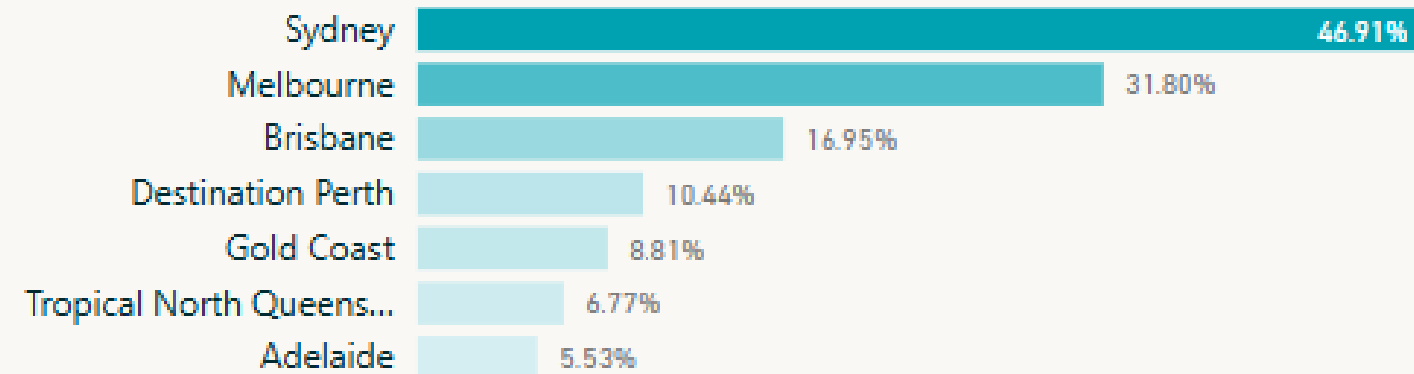
Source: \*Australian Bureau of Statistics, Overseas Arrivals and Departures. Tourism Research Australia, International Visitor Survey

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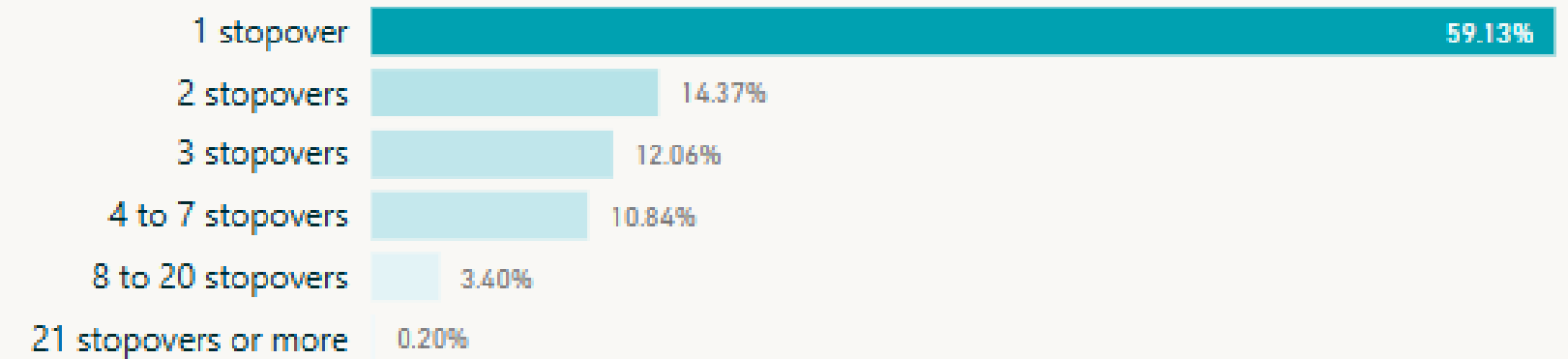
# Places visited in Australia & Place of Origin of Visitors

## Where do they go?

### Top 10 regions visited

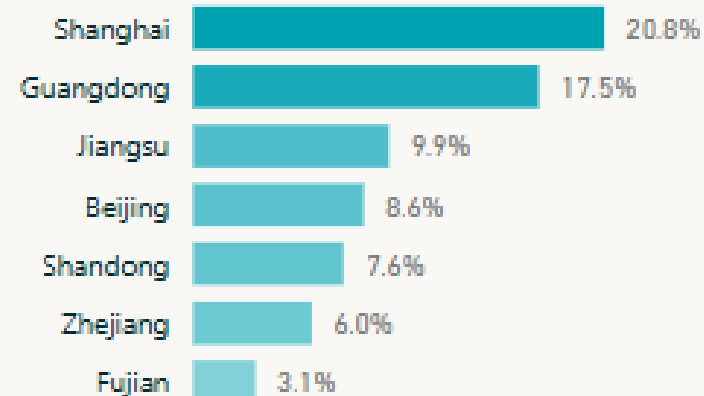


### Number of overnight stopovers made in Australia

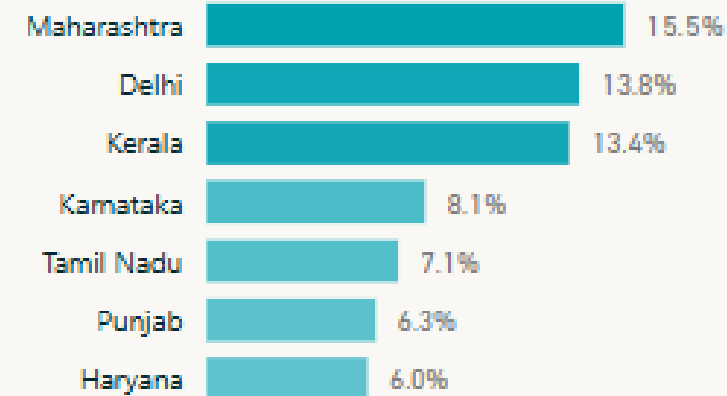


## What are the main place of origin of visitors to Australia? - data only available for the markets below

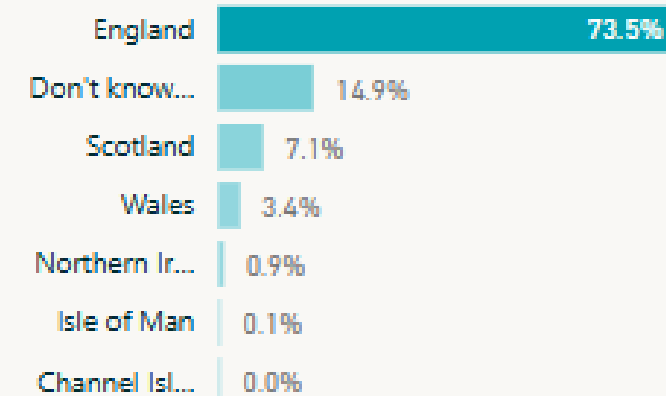
### China



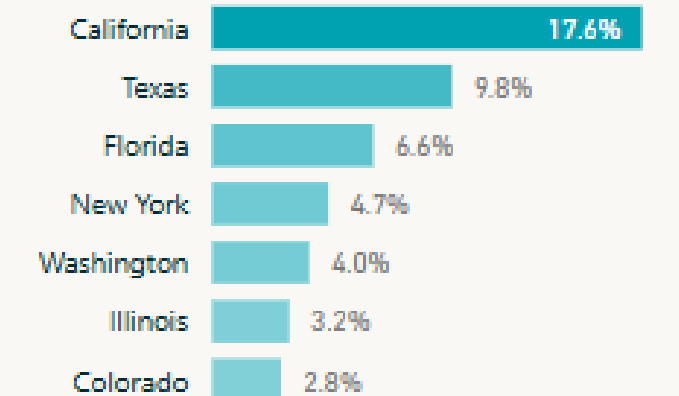
### India



### United Kingdom



### United States of America



Source: Tourism Research Australia, International Visitor Survey

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# HELIX PERSONAS

## Top 3 Helix Personas

1. 402 Working Hard 5%
2. 401 Home Improvers 5%
3. 304 Lifestyle Seekers 4%

# HELIX PERSONAS

Working Hard

## Demographics



Population: 1002k



Population Percentage: 3.9%



Average Household Income: \$115k



Average of 34 years

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# HELIX PERSONAS

## Home Improvers

### Demographics



Population: 1002k



Population Percentage: 3.9%



Average Household Income: \$129k



Average age of 39 years

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# HELIX PERSONAS

Life style Seekers

## Demographics



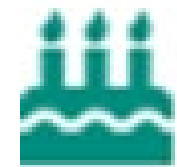
Population: 1002k



Population Percentage: 3.9%



Average Household Income: \$122k



Average age of 38 years

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# Manifesto

We all need a little  
country.  
Queensland Country.

As the world gets faster, it's more important than  
ever to find some slow.

To breathe clear air.

To plant your feet in the soil.

To listen to babbling streams.

To drive winding roads that all have stories to tell.

To drink wine from the source.

To sample produce picked by your own hand.

And eat paddock to plate.

To return a genuine smile.

To have a yarn.

To hike over boulders made by millennia.

It's more important than ever to reconnect with  
what matters most.

Family. Community. Nature. Yourself.

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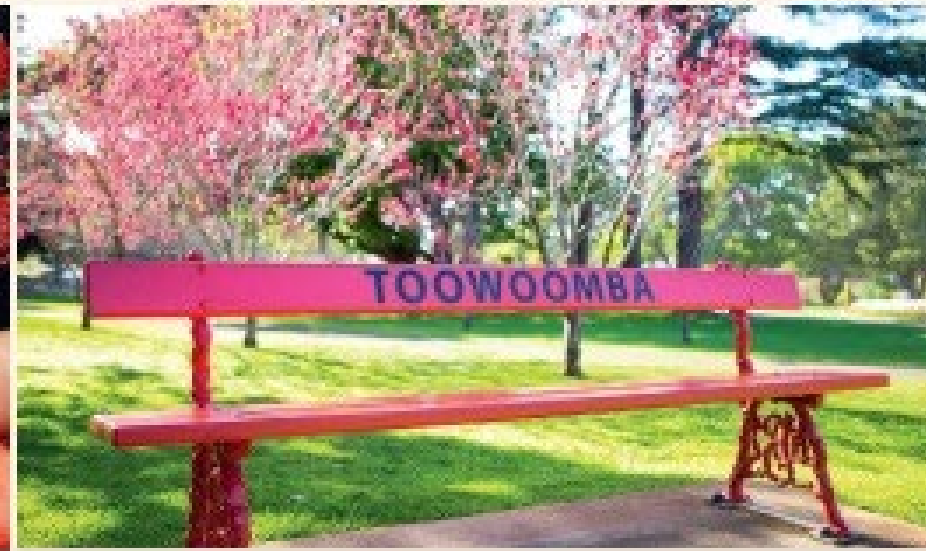
# Queensland Country

- Reflects the growth and diverse experiences we offer across a larger region, invite more people to explore all that we have to share.
- The green heart of the state - represent Toowoomba, Southern Downs & Granite Belt, South Burnett, Somerset Region, Lockyer Valley, Goondiwindi, Western Downs and the newest addition of Central Queensland Highlands.
- Captures the true spirit of country life - “We all need a little country”.
- Australians love to think they have a bit of country in their identity, a quick escape from the city that is an antidote to the pressure of the everyday.
- Promises a visit that is not just a getaway, but something good for the soul.

# Our Competitive Opportunities



**Hallmark & Signature  
Country Events**



**Flowers, Wine  
& Agritourism**



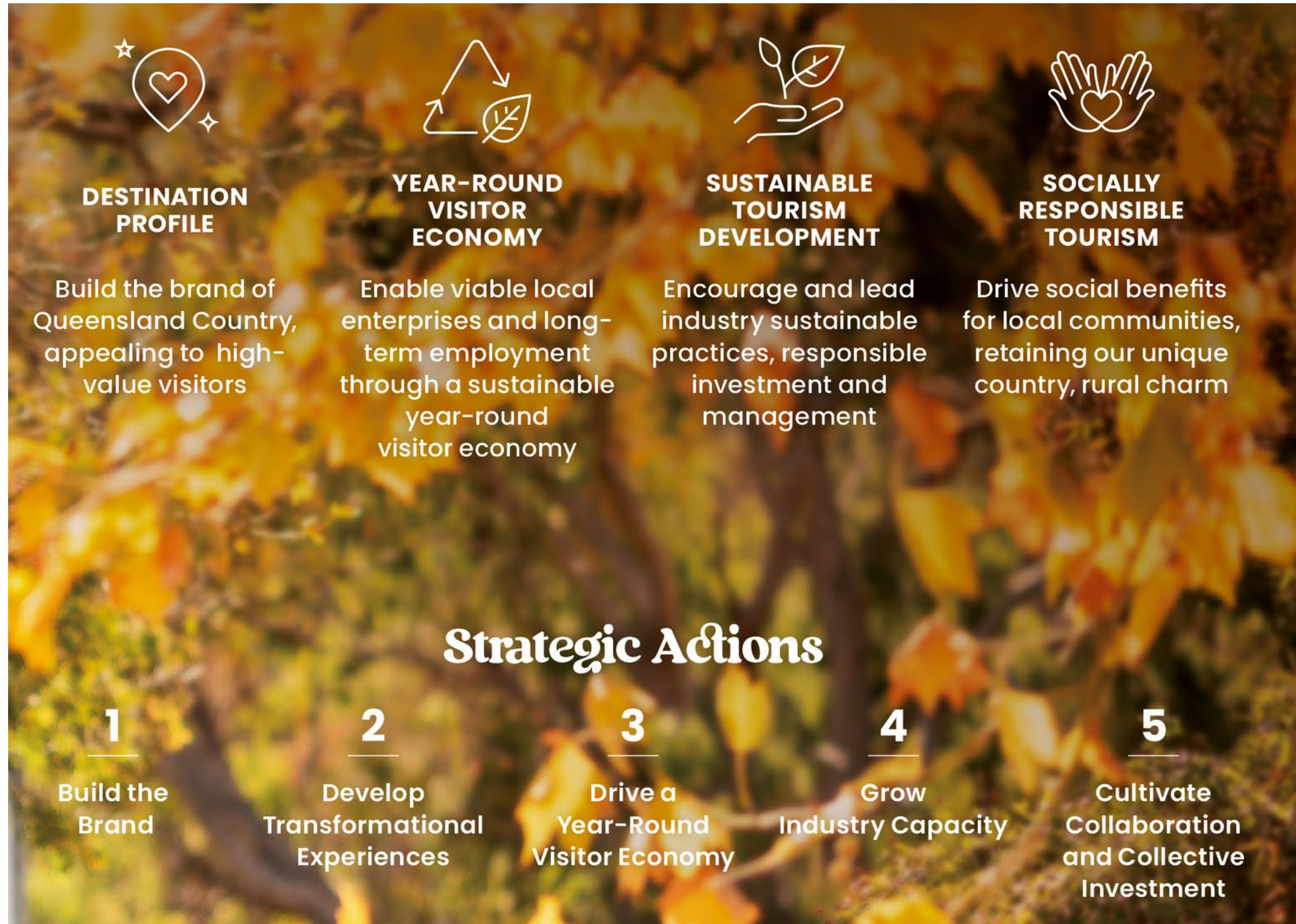
**4 Seasons**



**Iconic National Parks**

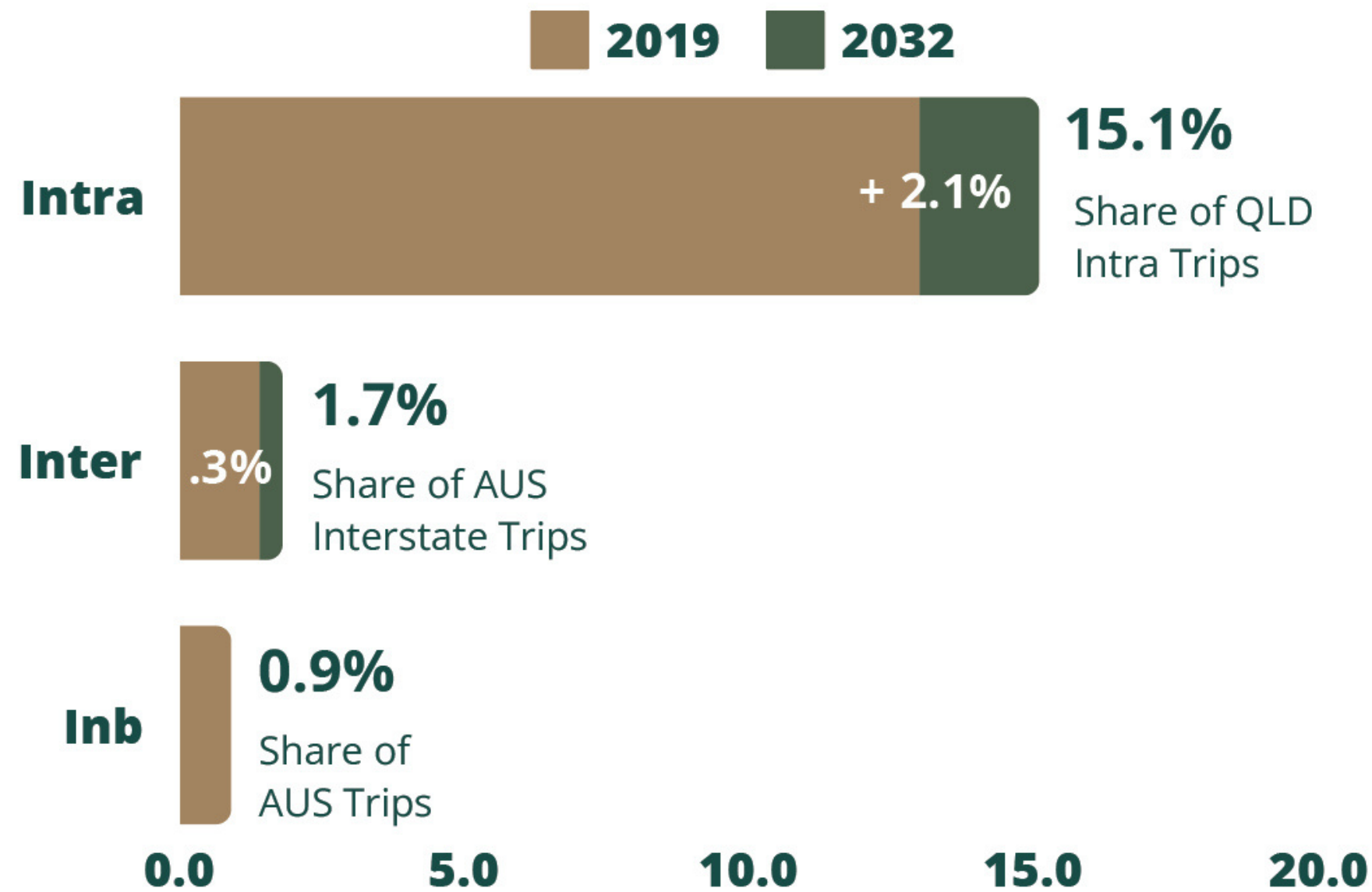
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# Goals



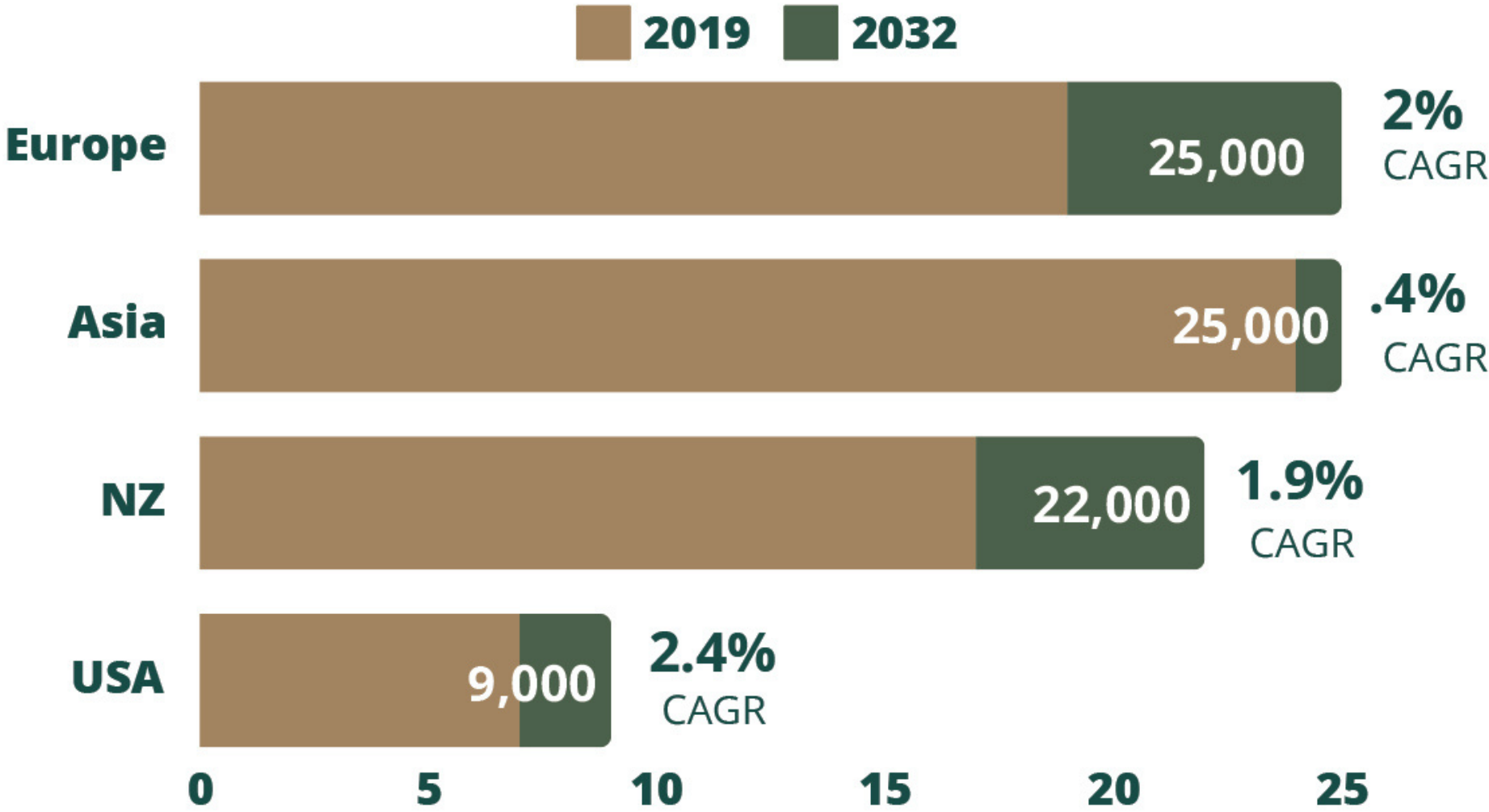
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# Share of Trips by Market Origin 2032

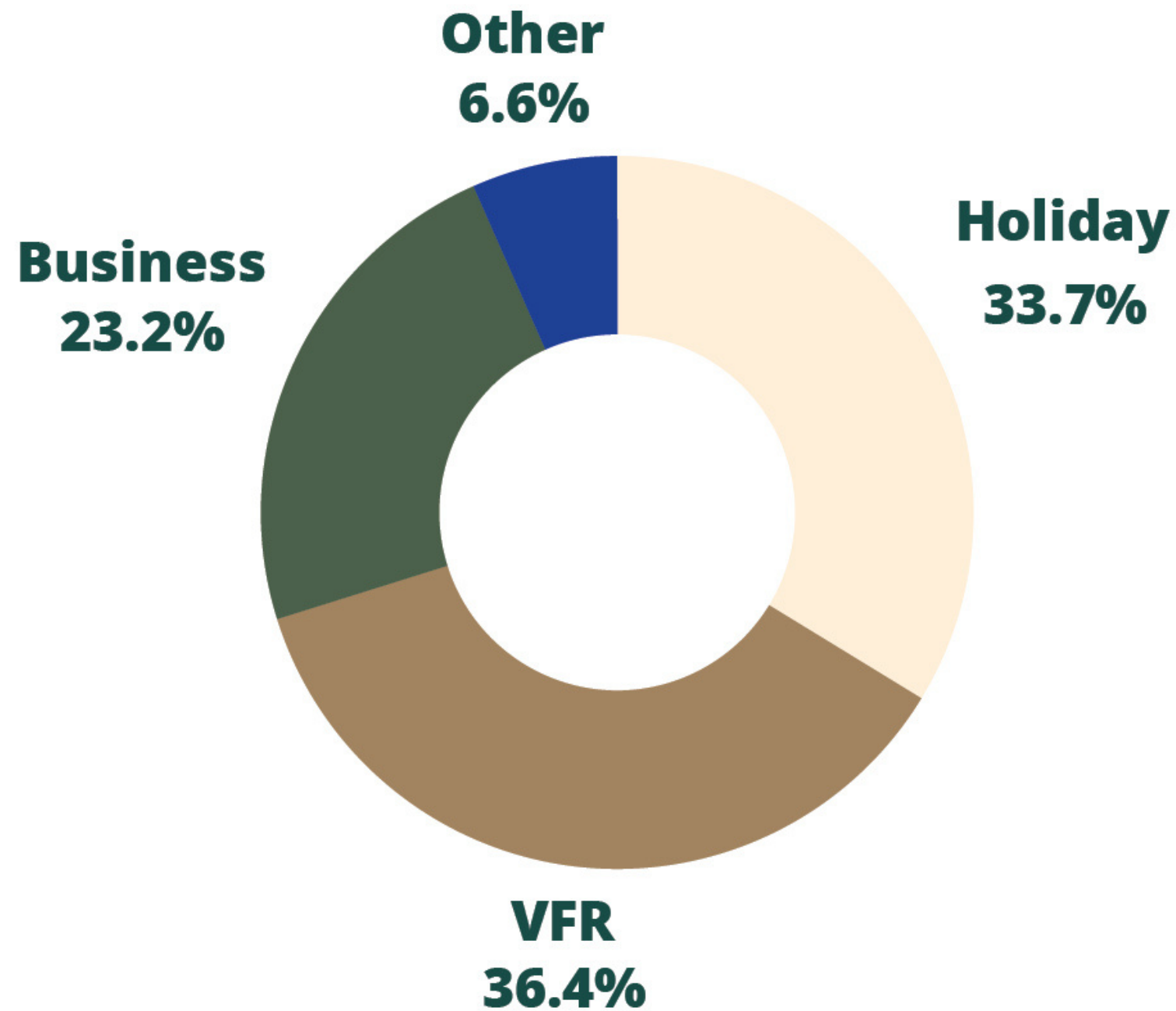


Fellow Queenslanders, intrastate travellers, love Queensland Country. With population growth of Brisbane and South East Queensland projected to nearly double by 2046, the destination has the opportunity to harness visitation by developing visitor experiences reflecting its unique cooler climate, four seasons, flowers, wine, iconic National Parks and country events.

# Trips by Source Inbound Market 2032 Target



The growth of Toowoomba, Brisbane and Gold Coast airports long-term provide opportunities to grow international visitation for visitors. QC is one the geographically closest Australian destinations to South East Asia offering cooler climate, flowers and wine country.

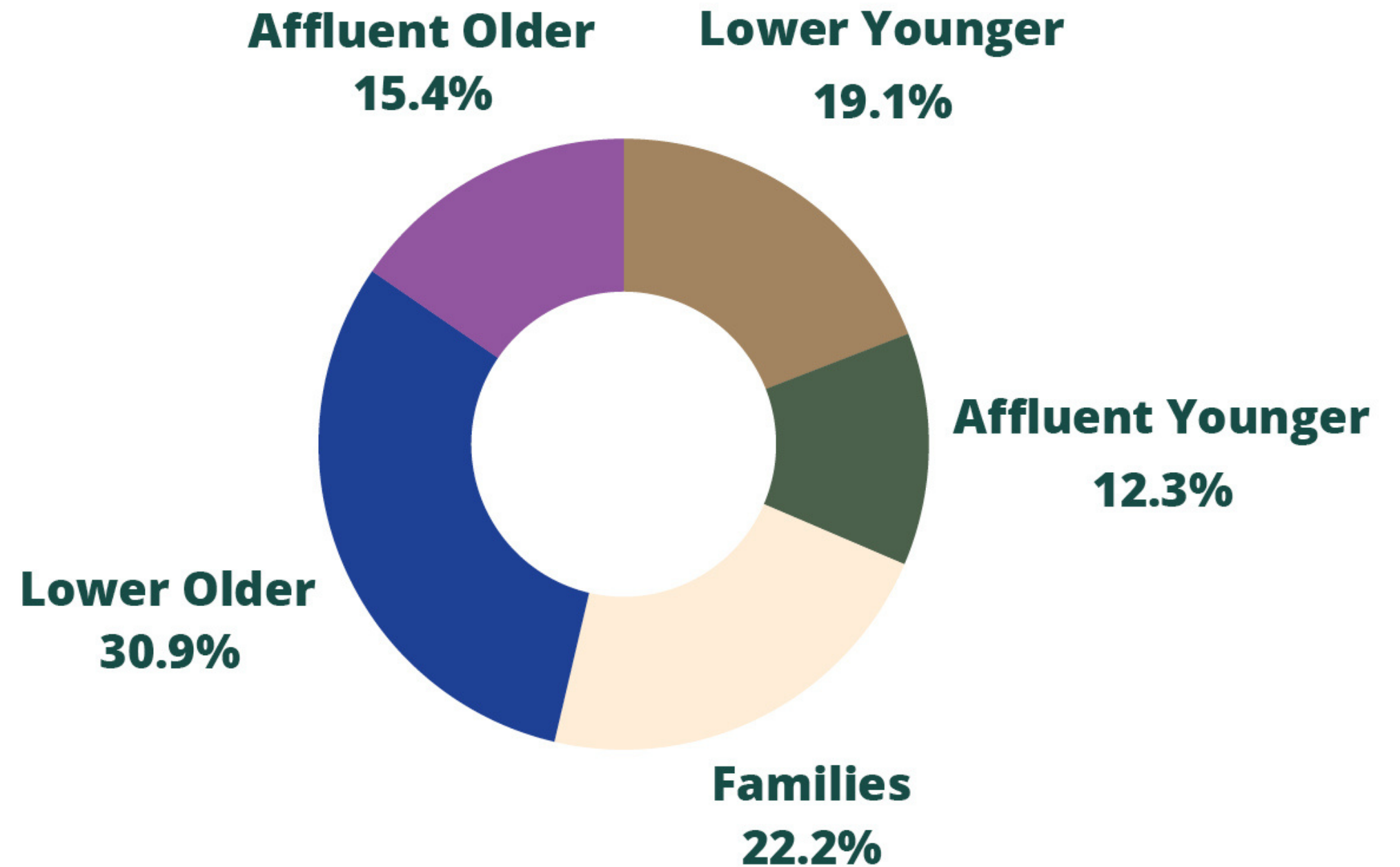


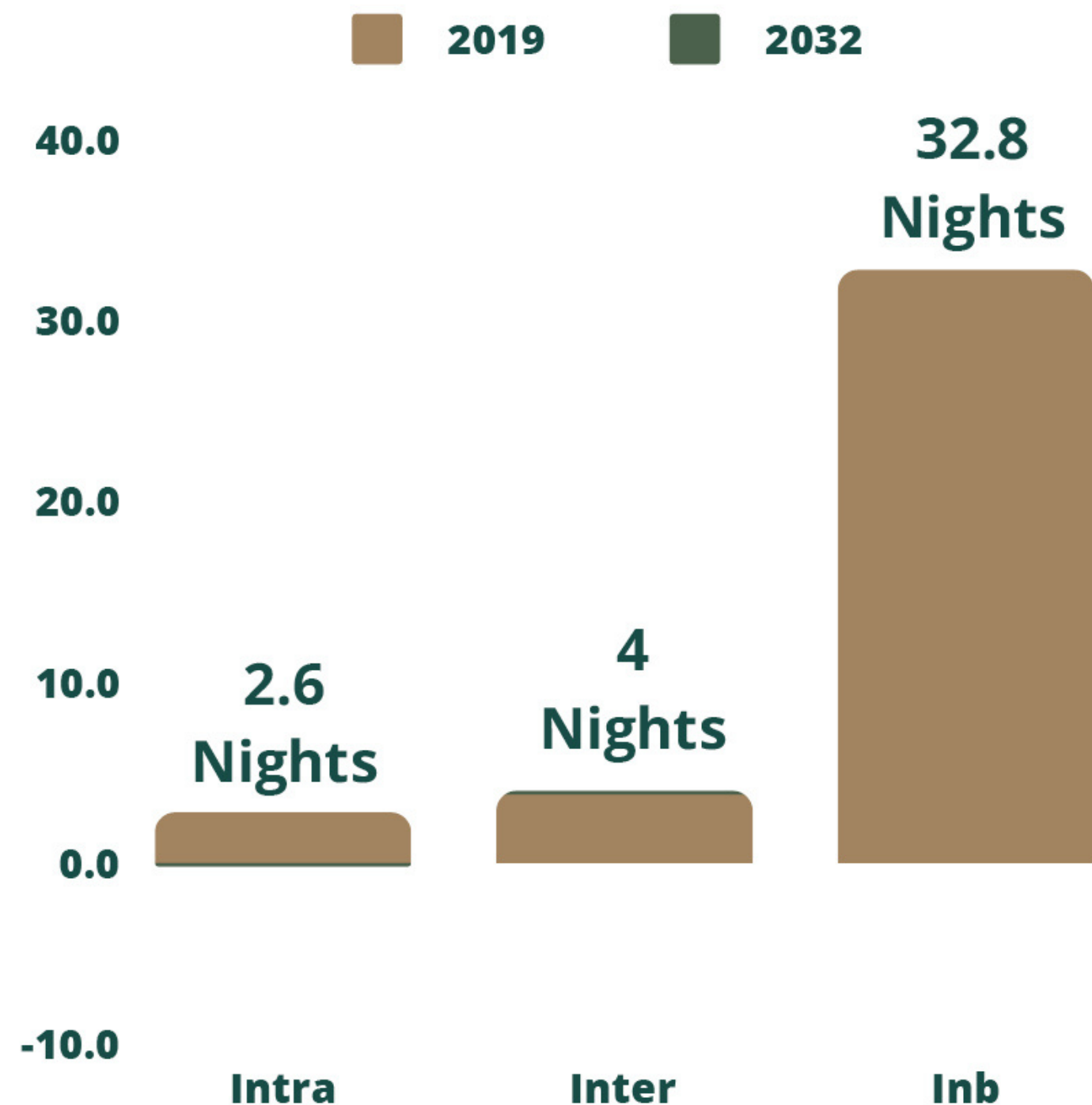
## Travel Mix by Purpose 2032

Destination benchmarking revealed QC has stronger VFR and business markets, presenting opportunities for business meetings, incentives and events in agriculture, horticulture and viticulture. A strong VFR market reveals the important role of the local community in profiling and activating the Queensland Country brand, and influence OVE within the destination.

# Traveller Profiles Mix 2032

Attracting fewer affluent visitors than benchmarked destinations, QC will need to further develop transformational visitor experiences to meet the needs of higher-yield visitors.





## Length of Stay in Nights 2032

Whole-of-destination collaboration, including interregional referrals and packaging will be required to further increase length-of-stay. Collective aspirations by QC industry include connected, multi-day trails: walking, hiking, cycling and rail trails for active exploration, linking with towns, villages, accommodation and dining.

Nielsen CMV data shows that 76% of Australians are interested in visiting new places, with most preferring:

- nature-centric experiences (64%)
- coastal proximity” (59%)
- exploration of secluded, off-the-beaten-track locations (54%).

And 30% of young Australians (25-39) plan to travel, making them 10% more likely to travel than the average Australian. Online booking trends show that 34% of domestic and 29% of overseas travel packages are booked online, reflecting recent growth.

Australians prefer: Booking Holdings Network (37%), TripAdvisor (27%), Virgin Travel and Tourism (20%), and Expedia (15%) for travel packages, and Booking.com (30%), Airbnb (17%), and Hotels.com (10%) for accommodation.

Nielsen Digital Content Ratings (DCR) data shows Uber and Qantas had 6.74 million and 5.88 million users in March, with minor drops in April but high average engagement times. Booking Holdings Network also became the third-largest platform by users.

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Thank you

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