

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 of 2020 to the June quarter of 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.
- The IVS estimates for the March, June and September quarters 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.
- **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 an 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 the 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%

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

- When it comes to regional performance, **Brisbane** had the largest share of 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%