



## Profile of the Queensland Touring Group and trends in their travel behaviour

Typically, a domestic tourer:

- stayed in Queensland for 12 nights on average
- travelled with their spouse (45%) or family (28%)
- was over 40 years of age (70%)
- was likely to be working full-time (42%) or to be retired (30%)
- lived in Queensland (36%) or New South Wales (NSW)<sup>3</sup> (34%).

The profile of Queensland's domestic tourers has changed little over the last decade, with the exception being an increase in the proportion of visitors over 55 years of age (up nine percentage points) and the proportion of retirees and/or pensioners (up five percentage points).

In comparison, an international tourer:

- stayed close to four weeks in Queensland on average
- travelled alone (42%) or with their spouse (37%)
- tended to be either in their 20s (33%) or 40 or more years of age (49%)
- was mainly from Europe (29%), the United Kingdom (UK) (23%) or New Zealand (NZ) (19%).

In the eleven years from 2000 to 2010:

- Queensland attracted 950,000 domestic tourers and 360,000 international tourers.
- Tourers stayed 11.1 million nights per year in Queensland.
- Each year, domestic tourers spent around \$1.2 billion per year in Queensland, or \$113 per night, and international tourers spent \$737 million per year, or \$76 per night – a total of \$2.0 billion.
- Both domestic and international tourers spent less than that of the average domestic and international visitor to Queensland (Table 1).
- International tourers spent less per night than domestic tourers did, mainly due to their longer trip length and having to cover the cost of international airfares to get to Australia.

In 2010:

- The economic activity generated by the Queensland Touring Group can be directly attributed to 15,400 jobs in Queensland, with the largest impact being in the Tropical North Queensland (TNQ) tourism region (3,600 jobs), Brisbane (3,400 jobs) and Gold Coast (2,650 jobs).

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<sup>3</sup> NSW includes residents from the Australian Capital Territory (ACT).

**Table 1 Summary of Queensland's domestic and international tourers**

	Queensland domestic visitors	Queensland domestic tourers	Queensland international visitors	Queensland international tourers
<b>Visitor profile</b>				
Average no. of visitors to Queensland per year	17 million	950,000	2 million	360,000
Average no. of nights spent in Queensland	4.5	11.8	15.8	26.4
<b>Average annual expenditure in Queensland</b>				
Total	\$11.1 billion	\$1.2 billion	\$3.4 billion	\$737 million
Per visitor	\$661	\$1,308	\$1,673	\$2,070
Per night	\$147	\$113	\$106	\$76
<b>Visitor characteristics</b>				
Age	54% 40 years+	70% 40 years+	30% 20–29 years 47% 40 years+	33% 20–29 years 49% 40 years+
Travel party	28% couples 23% families	45% couples 28% families	39% alone 32% couples	42% alone 37% couples
Origin	67% Queensland 19% NSW	36% Queensland 34% NSW	40% Asia 18% NZ 13% UK	29% Europe 23% UK 19% NZ
Employment status	54% full-time 15% retired/ pension	42% full-time 30% retired/ pension	NA	NA

### Growth of the Queensland Touring Group

During the early 2000s, the number of domestic tourers visiting Queensland increased, peaking in 2003, after which the market declined until a slight recovery in 2010 (Figure 1).

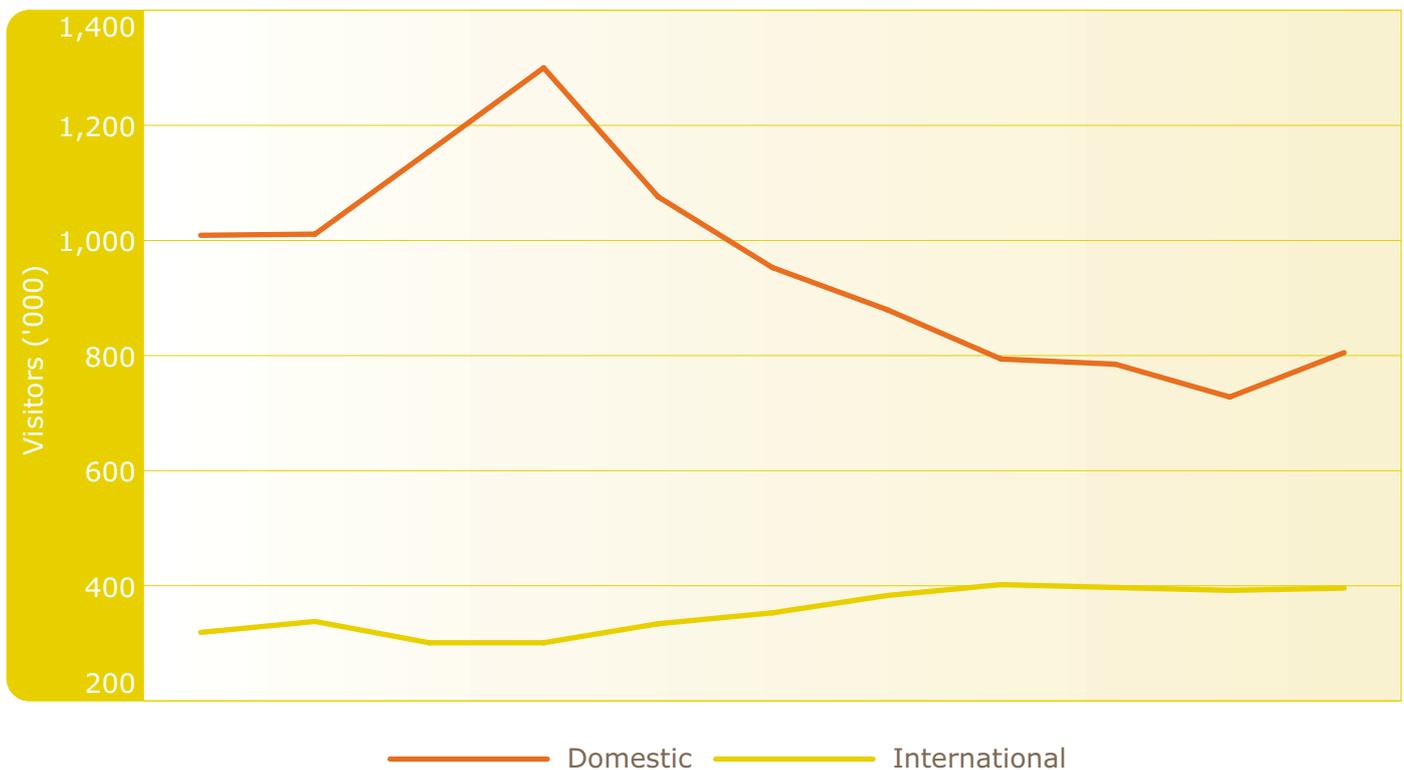
Overall, Queensland's international tourers grew over the decade (at an average rate of two per cent per year). Key international tourer growth segments were those who were:

- over 55 years of age (up six percentage points)
- under 30 years of age (up one percentage point)
- visiting friends and relatives (up two percentage points)
- travelling alone (up seven percentage points).

International budget routes, air capacity and discounted fares in Queensland and NSW encouraged international tourers to visit Australia.

The growth in international tourers has been driven by growth from NZ between 2000 and 2005 (up nine percentage points). However, this growth has now slowed due to the sluggish NZ economy. Although not a significant part of the market, growth from Asia (up three percentage points) overtook NZ between 2005 and 2010, mainly due to the increase in Asian students that were coming to Australia to study as well as increased air capacity between Australia and Asia.

**Figure 1 Domestic and international tourers, 2000–2010**



### **Influences on the Queensland Touring Group's travel**

International tourers in Queensland were influenced in 2002/03 by the downturn in international travel globally at the time, with key factors being:

- September 11 terrorist attacks (2001)
- Bali bombings (2002)
- SARS outbreak (2002/03)
- Iraq conflict.

These adverse world events also increased Australians' inclination to holiday within Australia and contributed to the domestic touring peak in 2003. The decline in domestic tourers from 2003 was influenced by declines in both the intrastate and interstate markets, as well as:

- Australians substituting international holidays for domestic holidays
- domestic holidays becoming less affordable due to a significant increase in both accommodation and fuel costs
- an increase in Australian household debt (limiting disposable income)
- increasing domestic and international budget air route capacity, giving Australians more travel mode and destination options.

From 2007, travel by the international touring group remained flat, impacted by the slowing of international tourist arrivals globally in 2008 and 2009. At the same time, domestic tourers were also taking fewer trips. Key influences on both domestic and international tourers at this time included:

- the Global Financial Crisis
- commodity and oil price increases
- the heightened Australian dollar (making outbound trips more affordable and inbound trips less so).

## **Trip characteristics**

### **Domestic tourers**

#### ***Overnight stays***

- On average, domestic tourers spent 11.8 nights in Queensland during their trip, however, three in five (61%) trips were for 10 nights or less.
- While over half (58%) of Queensland's domestic tourers spent the first night of their trip in Queensland, more than one-third (38%) had at least one overnight stop in NSW on the way.

#### ***Regions visited and travel routes***

- Typically, domestic tourers began their journey in the south east corner of Queensland (Brisbane, Gold Coast or Sunshine Coast) (52%).
- On average, they visited three different locations, spending at least one night at each and two-thirds (68%) explored one or two regions.
- Brisbane (37%), Gold Coast (33%) and Sunshine Coast (29%) were the most popular regions visited by domestic tourers.
- Around 15% visited TNQ – these tourers stayed the longest in TNQ (9.5 nights) on average, which was more than in any other Queensland region.
- More than half (54%) of domestic tourers were on a round trip, beginning and ending their journey at the same point in Queensland.
- While one-third (32%) visited three regions or more, another third (32%) also stayed in the one region the whole time they were in Queensland.
- One-third (38%) stayed solely within the south east corner of Queensland (Brisbane, Gold Coast and Sunshine Coast) the entire time they were in Queensland, and of those that travelled beyond south east Queensland, a popular destination was TNQ.

#### ***Transport and accommodation***

- Five per cent of domestic tourers were on the road for a month or more.
- The majority of domestic tourers (77%) used self-drive transport for their entire journey, rather than using multiple modes of transport.
- The majority of domestic tourers stayed in private accommodation (e.g. the property of friends or relatives) (55%) and in hotels, motels or resorts (49%) for at least one night when travelling in Queensland.
- Domestic tourers spent more nights in private (37%) or caravan or camping-style (28%) accommodation than other accommodation types.
- Domestic tourers spent 44% of their nights away from home in unpaid<sup>4</sup> accommodation, with 13% of nights spent in free caravan or camping sites and the remainder (87% of nights) spent in private accommodation. From 2000 to 2010, the proportion of domestic tourers choosing caravan or camping-style accommodation in Queensland increased (up six percentage points). This was not surprising given the increase in the use of this style of accommodation across the domestic visitor market in Queensland over the same period.

### **International tourers**

#### ***Overnight stays***

- International tourers spent 26.4 nights in Queensland during their trip, however, around half (56%) of all trips in Queensland lasted two weeks or less.
- A further one in ten (11%) international tourers were in Queensland for more than 50 nights, many of whom were on a working holiday visa.
- The majority of Queensland's international tourers (55%) spent their first Australian night in Queensland.
- A further third (33%) spent at least one night in NSW before travelling to Queensland.

<sup>4</sup> Unpaid accommodation is defined in this report as any type of non-commercial accommodation including: camping in a national park, on crown land, on the side of the road or on private property; staying in private property; and sleeping on a bus, train or coach.

### ***Regions visited and travel routes***

- International tourers most commonly began and ended their Queensland journey in Brisbane (42% began, 41% ended), Gold Coast (20%, 17%) or TNQ (19%, 23%). This was not surprising given that Queensland's major airports are located in these regions, and that half (48%) began and ended their journey in Queensland at the same point.
- During their four-week stay in Queensland, international tourers visited five different locations on average, spent at least one night at each and explored one or two regions (52%).
- Only one-quarter (27%) of international tourers stayed in Queensland for the duration of their time in Australia.
- Generally, international tourers spent most of their trip to Queensland in Brisbane (32%), TNQ (19%) and Gold Coast (15%).
- While almost half (48%) visited three regions or more, one in five (22%) stayed in the one region the whole time they were in Queensland.
- One-third (35%) stayed solely within the south-east corner of Queensland (Brisbane, Gold Coast and Sunshine Coast) the entire time they were in Queensland.
- A small number of international tourers drove up the coast making multiple stopovers. However, international tourers mostly stayed within the south-east corner, or flew on to the Whitsundays or TNQ.
- Some international tourers entered Queensland in the north. Often these tourers travelled from TNQ down as far as the Whitsundays, then returned to TNQ.

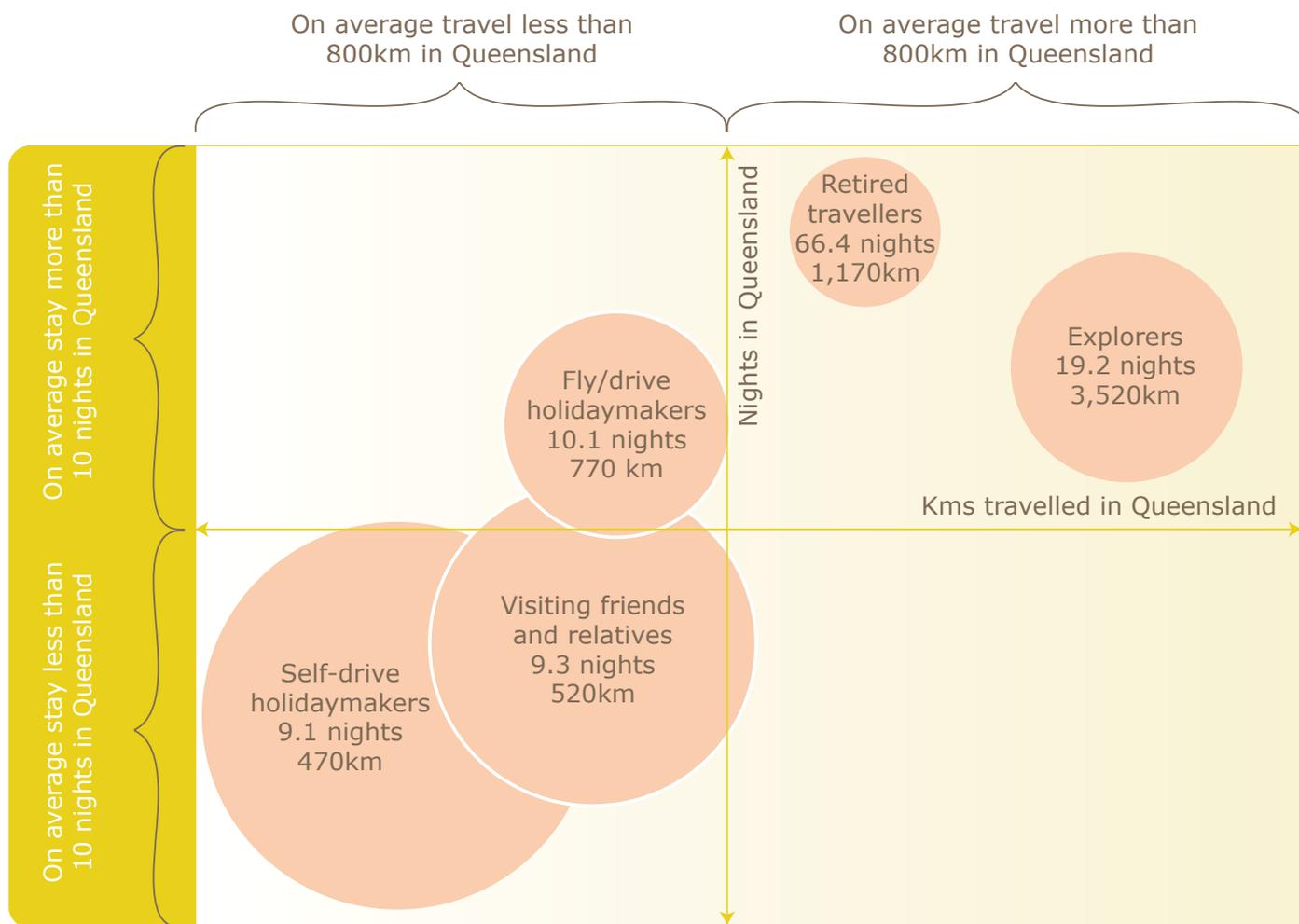
### ***Transport and accommodation***

- While less than half (40%) of international tourers used self-drive transport for their entire Queensland journey, most opted to fly/drive or used other multi-transport options including private vehicles (36%), aircraft (23%) and rental vehicles (21%).
- Over half (54%) of international tourers used hotel, motel or resort style accommodation for at least one night during their trip.
- Overall, international tourers spent more nights in rental (25%), private (e.g. property of friends or relatives) (30%) and backpacker-style (16%) accommodation.
- Hotels, motels and resorts tended to be used on shorter stops (on average 2.6 nights) compared with other accommodation types.
- International tourers on average stayed for longer periods in rental-style accommodation (21.2 nights), driven by international visitors on student and working visas.
- Overall, international tourers spent one-third (34%) of their nights in unpaid accommodation, 6% were spent in free caravan or camping sites, with the remainder (94%) spent in private accommodation.

## Characteristics of domestic tourer sub-groups

Segmentation analysis of domestic tourers identified five sub-groups.

**Figure 2 Types of domestic tourers**



Note: Circle size represents expenditure by sub-groups

### Fly/drive holidaymakers:

- travelled with family and/or friends
- lived interstate and were under 55 years of age
- appeared to be more time-poor (as more worked full-time) and therefore saved time by flying into Queensland then renting a vehicle to get around
- typically stayed in hotel, motel or resort-style accommodation and were on a round trip (i.e. entered and exited the state at the same point)
- mainly spent their entire trip in Queensland and stopped overnight in one or two regions
- commonly visited Brisbane, Gold Coast and TNQ
- contributed (on average) \$193 million per year to the Queensland economy, and on average they spent \$231 per night—the most per night expenditure of all the domestic tourers.

### Visiting friends and relatives:

- primarily travelled to visit friends and relatives (mostly in Brisbane but also on the Gold and Sunshine Coasts)
- predominantly used private accommodation (e.g. property of friends or relatives)
- were a mix of couples and families, often from regional Queensland and NSW
- drove to their destination in a private vehicle, spent most of their trip at the one stop (i.e. with their friends and relatives) and tended not to travel much between regions
- contributed \$219 million per year to the Queensland economy, and spent \$87 per night.

### **Explorers:**

- visited more of the state than other domestic tourers and the focus of their trip was Queensland
- stopped overnight at an average of 7.5 places in Queensland, but tended to avoid overnight stops in major tourist centres, such as Brisbane and Gold Coast, and only spent a short amount of time (on average 2.8 nights) at each stop
- travelled mainly with their spouse, were from Queensland, and were over 55 years of age
- used caravan or camping-style accommodation for the duration of their trip in Queensland
- contributed \$248 million per year to the Queensland economy, and spent \$104 per night in Queensland.

### **Retired travellers:**

- consisted mainly of retired couples over 55 years of age from Victoria and NSW
- drove long distances in their own vehicle, and only made a few stops (3.4 overnight stops on average) but spent a long time at each stop (on average 19.2 nights per stop)
- Made just over half of their stops in Queensland, and four in five nights away from home were spent in the state
- most commonly used caravan or camping or private accommodation
- represented a small proportion (2%) of domestic tourers—an average of 19,000 visitors to Queensland annually
- contributed the smallest amount of the domestic tourers (\$56 million per year) to the Queensland economy
- spent the least per night in Queensland (\$46 per night), despite their long length of travel.

### **Self-drive holidaymakers:**

- were couples and families who mainly travelled to the major tourist destinations in the south east of the state (i.e. Brisbane, Gold Coast or Sunshine Coast)
- often stayed in hotels or private accommodation and usually drove their own vehicle
- often lived interstate and stopped over on their way to south-east Queensland—as such, they only spent half of their trip in Queensland
- declined in numbers between 2000 and 2010 in alignment with that of domestic tourers generally
- contributed the largest amount of the domestic tourers (\$531 million per year) to the Queensland economy
- spent \$131 per night in Queensland.

While each of these five types of domestic tourers had their own profile and style of holiday, there were notable similarities between Explorers and Retired travellers, who:

- spent the most time away from home (often two and half weeks or more)
- typically travelled long distances (often twice as far as any other segment)
- tended to use caravan or camping-style accommodation more frequently
- were mostly aged 55 years or more.

When combined, these domestic tourers represented less than 1% of domestic visitors to Queensland annually.

The profile and holiday behaviour of Visiting friends and relatives and Self-drive holidaymakers were more closely aligned to the average domestic visitors to Queensland on a longer trip (i.e. away from home four nights or more). That is, they were typically full-time workers or retirees from interstate, travelling with their spouse or family, spent under 10 nights in the south east of the state, flew or drove to their destination and stayed in a hotel, motel or resort or in private accommodation.

**Table 2 Queensland's domestic tourist characteristics**

	<b>Queensland's domestic tourists 100%</b>	<b>Fly/drive holidaymakers 9%</b>	<b>Visiting friends and relatives 30%</b>	<b>Explorers 13%</b>	<b>Retired travellers 2%</b>	<b>Self-drive holidaymakers 45%</b>
<b>% of domestic tourists</b>						
Avg no. of tourists to Queensland per year	950,000	90,000	290,000	128,000	19,000	428,000
Avg no. of nights spent in Queensland	11.8	10.1	9.3	19.2	66.4	9.1
Avg kms travelled in Queensland	934	770	520	3,520	1,170	470
Avg annual expenditure in Queensland						
Total	\$1.2 billion	\$193 million	\$219 million	\$248 million	\$56 million	\$531 million
Per night	\$113	\$231	\$87	\$104	\$46	\$131
<b>Visitor characteristics</b>						
Age	70% 40 years+	59% 40 years+	45% 55 years+	55% 55 years+	84% 55 years+	66% 40 years+
Travel party	45% couples 28% families	42% couples 28% families	43% couples 25% families	58% couples	73% couples	41% couples 33% families
Origin	36% Queensland 34% NSW	32% rest of Aust 23% Vic 23% NSW	43% Queensland 33% NSW	54% Queensland	41% Vic 25% NSW	40% NSW 31% Queensland
Employment status	42% full-time 30% retired or pensioner	55% full-time	38% full-time 33% retired or pensioner	42% retired or pensioner 36% full-time	75% retired or pensioner	45% full-time 26% retired or pensioner
<b>Entry/exit</b>						
Destination prior to Queensland	58% home 38% NSW	86% home	63% home	69% home	58% NSW 38% home	49% NSW 47% home
Start and finish points in Queensland	BNE <sup>5</sup> , GC <sup>6</sup> , TNQ	TNQ, BNE, GC	BNE, GC	Across state	BNE, GC, SC <sup>7</sup>	BNE, GC, SC
<b>Queensland trip characteristics</b>						
Average no. of stops in Queensland	3.4	3.4	2.8	7.5	3.4	2.6
Average no. of tourism regions visited	2.2	2.1	1.9	4.2	2.2	1.9
Proportion of trip nights spent in Queensland	72%	83%	71%	78%	80%	64%
Transport most commonly used to enter/exit and get around Queensland	Private vehicle	Air & rental car	Private vehicle	Private vehicle	Private vehicle	Private vehicle
Regions where tourists spent the most nights	GC, BNE, SC, TNQ	TNQ, BNE, GC	BNE, SC, GC	TNQ, Northern, Central Queensland	SC, TNQ, GC	GC, SC, BNE
Accommodation where tourists spent the most nights	37% private accommodation 28% caravan or camping	Hotel, motel or resort Private accommodation	Private accommodation	Caravan or camping	Caravan or camping Private accommodation	Hotel Private accommodation

<sup>5</sup> Brisbane

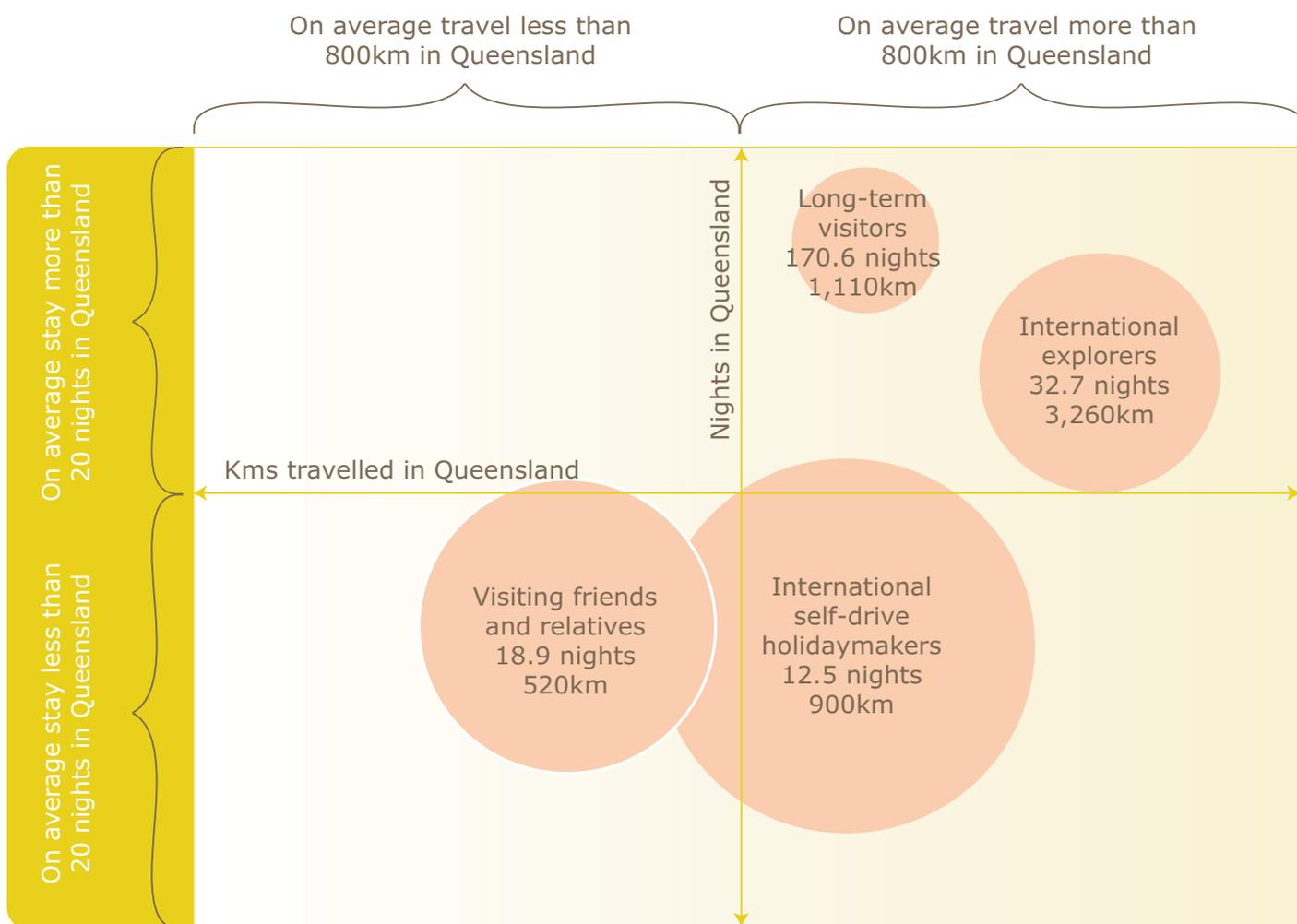
<sup>6</sup> Gold Coast

<sup>7</sup> Sunshine Coast

## Characteristics of international tourer sub-groups

Segmentation analysis of international tourers identified four sub-groups:

**Figure 3 Types of international tourers**



Note: Circle size represents expenditure by sub-groups

### International self-drive holidaymakers:

- spent less than half of their holiday in Queensland
- generally stayed in hotels, motels or resorts and used rental vehicles to travel around the state
- commonly stopped at Brisbane, Gold Coast and TNQ
- were mostly over 40 years of age, with one-third in their 20s and half from Europe.
- contributed on average \$184 million per year to the Queensland economy, second to the International explorers
- spent the largest amount on average per night in Queensland (\$110 per night) of all the international tourers.

### Visiting friends and relatives overseas:

- travelled to Australia to visit their friends and/or relatives in the south-east of the state (Brisbane, Gold Coast and Sunshine Coast)
- tended not to travel very far in Queensland (520km on average) and mainly used private accommodation (e.g. property of friends or relatives) and private vehicles
- mostly travelled alone, were over 40 years of age and were from NZ or the UK
- contributed \$172 million per year to the Queensland economy, and spent \$69 per night.

### **International explorers:**

- were mostly European, in their 20s and spent a lot of time travelling throughout Queensland
- preferred camping, caravanning and backpacker-style accommodation, and half visited NSW on their way to Queensland
- made many overnight stops during their trip in Queensland (on average 9.9 stops), but only spent a short time at each stop (on average 3.3 nights per stop)
- experienced the least growth of the international tourers between 2000 and 2010
- contributed the largest amount of the international tourers (\$198 million per year) to the Queensland economy, and spent \$74 per night.

### **Long-term visitors:**

- were largely 20–29 years of age, travelled alone and spent a long time in Queensland (almost six months on average)
- were most likely temporarily living in Brisbane or Gold Coast for study or on a working holiday and travelled for leisure in their spare time
- represented the smallest proportion (4%) of international tourers in Queensland—an average of 15,000 visitors each year
- contributed the least amount to the Queensland economy (\$139 million per year) of the international tourers
- spent the least per night in Queensland (\$53 per night), despite their long length of stay in Queensland.

While each of the four types of international tourers had their own profile and style of holiday, there were notable similarities between some of the groups. In particular, International explorers and Long-term visitors:

- spent the most time away from home (often three weeks or more)
- typically travelled long distances (800kms on average)
- often were younger Europeans.

International explorers were also similar to International self-drive holidaymakers, with most:

- being European
- stopping over in NSW on their way to Queensland
- travelling around in rental vehicles
- visiting more Queensland regions than average
- spending less than half of their overall journey in the state.

**Table 3 Queensland's international tourist characteristics**

	<b>Queensland's international tourists 100%</b>	<b>International self-drive holidaymakers 32%</b>	<b>Visiting friends and relatives overseas 36%</b>	<b>International explorers 21%</b>	<b>Long-term visitors 4%</b>
<b>% of international tourists</b>					
Avg no. of tourists to Queensland per year	360,000	114,000	130,000	73,000	15,000
Avg no. of nights spent in Queensland	26.4	12.5	18.9	32.7	170.6
Avg kms travelled in Queensland	1,296	900	520	3,260	1,110
Avg annual expenditure in Queensland					
Total	\$737 million	\$184 million	\$172 million	\$198 million	\$137 million
Per night	\$76	\$110	\$69	\$74	\$53
<b>Visitor characteristics</b>					
Age	49% 40 years+ 33% 20-29 years	52% 40 years+ 27% 20-29 years	59% 40 years+	51% 20-29 years 31% 40 years+	70% 20-29 years
Travel party	42% alone 37% couples	48% couples	54% alone	40% couples 39% alone	77% alone
Origin	29% Europe (excl UK) 23% UK 19% NZ	30% Europe 22% UK 18% NZ	28% NZ 25% UK	53% Europe 26% UK	36% Asia 23% Europe 15% UK
<b>Entry/exit</b>					
Destination prior to Queensland	55% Queensland first stop 33% via NSW	45% Queensland first stop 39% via NSW	75% Queensland first stop	48% via NSW 34% Queensland first stop	76% Queensland first stop
Start and finish points in Queensland	BNE <sup>8</sup> , GC <sup>9</sup> , TNQ	BNE, TNQ	BNE	BNE, TNQ	BNE, GC, TNQ
<b>Queensland trip characteristics</b>					
Average no. of stops in Queensland	4.9	3.6	3.2	9.9	4.6
Average no. of tourism regions visited	3.1	2.5	2.0	6.1	2.5
Proportion of trip nights spent in Queensland	52%	39%	58%	42%	77%
Transport most commonly used to enter/exit and get around Queensland	Private or rental vehicle or aircraft	Rental vehicle or aircraft	Private vehicle or aircraft	Private or rental vehicle	Private vehicle or aircraft
Regions where tourists spent the most nights	BNE, TNQ, GC, SC <sup>10</sup>	TNQ, BNE, GC	BNE, GC, SC	BNE, TNQ, Whit <sup>11</sup>	BNE, GC
Accommodation where tourists spent the most nights	32% private accom. 25% rental accom. 16% backpackers	Hotel, motel or resort	Private accommodation	Backpackers Caravan or camping	Rental accommodation

<sup>8</sup> Brisbane

<sup>9</sup> Gold Coast

<sup>10</sup> Sunshine Coast

<sup>11</sup> Whitsundays

## Acknowledgements

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