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Department of Resources, Energy and Tourism

Tourism Research Australia

# **Economic Importance of Tourism in Australia's Regions**

## **Phase 2: Large tourism-dependent regions**



**TRA** TOURISM  
RESEARCH  
AUSTRALIA

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# 1. Introduction

For many regions in Australia, income from tourism contributes significantly to their local economies. Tourism Research Australia's (TRA) report, *The Economic Importance of Tourism in Australia's Regions* (TRA, 2011a) developed a measure for tourism's economic importance and ranked each of Australia's tourism regions by their relative economic importance. This showed that the economic importance of tourism to a region differs significantly across Australia's tourism regions. The level of importance is influenced by a range of factors, including the size of the tourism industry and the level of economic diversity in the region. For the majority of regions, tourism industries are smaller but economically important (Figure 1). However, a group of seven regions, which account for 21% of total tourism expenditure in Australia, have both larger tourism industries and a high dependence on tourism. The seven regions include Australia's South West (WA), Gold Coast (QLD), Mid North Coast (NSW), Northern Rivers (NSW), South Coast (NSW), Sunshine Coast (QLD) and Tropical North Queensland.

This report aims to build on the results produced in the first report by examining the set of large tourism regions, in which tourism is economically important. Specifically, it will focus on profiling the regions to gain a better understanding of the regions and their tourism industries. This report will examine the similarities and differences of the regions based on the local economy, the experiences offered and the visitor profile and satisfaction of visitors. Moreover, the aim of this report is to bring together this set of regions to determine what common factors drive both an economically large and important tourism industry and where the potential vulnerabilities lie.

Section 2 of this report provides further background on the first report, Section 3 will draw out key commonalities in the group, and Section 4 will provide concluding remarks and implications.

## 2. Background

Figure 1 plots the relative size of the tourism industry (based on tourism expenditure) against the relative importance of tourism for 77 tourism regions in Australia (see TRA, 2011a for more detail). The seven regions examined in this report are the regions in the top right hand quadrant (higher importance, larger tourism industry). Subsequent stages of the economic importance research will seek to address those regions occupying the other quadrants of Figure 1.

**Figure 1: Comparison between Industry Size and Economic Importance of Tourism**



Source: TRA (2011a)

The figures presented in this report are derived from data collected in the National Visitor Survey (NVS), International Visitor Survey (IVS) and the Visitor Profile and Satisfaction (VPS) database. Unless otherwise stated, all figures refer to the year ending December 2010.

### **3. Similarities and differences between regions**

#### **3.1 Profile and significance of the tourism industry**

Tourism is one of the most prominent industries in all seven regions. The economic importance of tourism in these regions ranges from 4.8% in Australia's South West to 9.7% in Tropical North Queensland (Table 1). The Australian benchmark for economic importance of tourism is 3%. Thus this set of regions is highly reliant on tourism income for their local economies.

The economic importance of tourism in these regions is further illustrated by a relatively large number of tourism businesses. For this set of regions (excluding Australia's South West), the proportion of businesses that are tourism related is above the national average of 20.2%. This importance also flows to the employment in the region, with over half of tourism businesses employing individuals in all regions other than the Gold and Sunshine Coasts<sup>1</sup>, well above the national average of 39.7% (ABS, 2010).

All regions are accessible by domestic air transport. Both the Gold Coast and Tropical North Queensland have international terminals, while Tropical North Queensland is the only region with a port. Outside of capital city regions, this is an attribute not found in many other tourism regions. The number of accommodation establishments in this set of regions is relatively high, ranging from 147 in Australia's South West to 260 in the Mid North Coast, compared to the typical tourism region, which has 93 accommodation establishments, on average (TRA, 2011b). This is an indication of the larger volume of visitors to these regions. The breakdown of accommodation type also varies markedly across the regions (Appendix B, Tables B13 and B14).

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<sup>1</sup>ABS unpublished data

**Table 1: Profiling tourism regions - Significance of the tourism industry**

	Gold Coast	Tropical North Queensland	Sunshine Coast	Northern Rivers	Mid North Coast	South Coast	Australia's South West
Economic Importance (National benchmark = 3%)	6.4%	9.7%	6.7%	6.1%	8.7%	5.4%	4.8%
Main Industries	Tourism, Construction, Health & Medical	Agriculture, Mining and Tourism	Tourism, Construction, Health & Medical	Tourism, Health & Medical	Tourism, Manufacturing, Agriculture	Manufacturing, Mining, Tourism	Agriculture, Mining, Tourism
Tourism Businesses <sup>a</sup> (Benchmarks: Regional Australia, excluding capital cities=18.2% National=20.2%)	14,240 (20.8% of all businesses)	5,282 (21.9% of all businesses)	7,989 (20.7% of all businesses)	5,226 (20.2% of all businesses)	6,168 (22.5% of all businesses)	7,004 (24.2% of all businesses)	3,999 (18.1% of all businesses)
Employing Businesses <sup>a</sup> (National Benchmark =39.7%)	6256 (43.9% of all tourism businesses)	2700 (51.1% of all tourism businesses)	3743 (46.9% of all tourism businesses)	2720 (52% of all tourism businesses)	3467 (56.2% of all tourism businesses)	3841(54.8% of all tourism businesses)	2072 (51.8% of all tourism businesses)
Accommodation Establishments (as at March 2011)	172	228	164	158	260	217	147
Airports/Ports	Domestic and International Airports	Domestic and International Airports; Port	Domestic Airport	Domestic Airports (3 airports)	Domestic Airports (2 airports)	Domestic Airports (2 airports)	Domestic Airport

<sup>a</sup> Based on business numbers in June 2009

Sources: TRA (2011a, 2011b), ABS unpublished data, ABS 2010

### 3.2 Attractions and experiences expected<sup>2</sup>

The dominant attractions across this set of regions revolve around the beach and/or the nature experiences offered. This may be explained by the fact that all regions are coastal and have National Parks. Experiences associated with beaches and nature can vary from providing a back drop for relaxing, rejuvenating and spending time with others through to providing a range of activities to keep visitors happy.

The expectation of a wide range of experiences when visiting a region is something that is common across most of these regions (Table 2). Of the 13 experiences benchmarked<sup>3</sup>, visitors to the regions expect each region to offer at least five of the experiences, with most expecting eight or nine experiences ranging from relaxing and rejuvenating through to having an adventure. In contrast, experiences that were not expected from any of these regions were around art, culture and history/heritage, with the expectation of the region offering these experiences below the benchmark.

Visitors to these regions expect to relax, rejuvenate and spend quality time with others. These experiences are in line with previous research which has shown that relaxing and recharging, as well as allowing travellers the ability to break from everyday life and gain new experiences, are key motivators for Australian consumers to travel (TRA, 2007). These experiences are offered by these seven regions.

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<sup>2</sup> The experiences expected are based on VPS studies conducted in the Gold Coast; Cairns, Port Douglas and Tropical Tablelands in Tropical North Queensland; Noosa, Cooloola, Maroochy and Caloundra in the Sunshine Coast; Kingscliff/Cabarita in the Northern Rivers; Coffs Coast and Port Macquarie in the Mid North Coast; and Batemans Bay, Sapphire Coast and Shoalhaven in the South Coast. No VPS studies have been conducted in Australia's South West.

<sup>3</sup> All experiences are benchmarked against the average expectation across the destinations in the VPS benchmark database. To date there are over 70 destinations in the database.

**Table 2: Attractions and experiences expected**

Regions	Attractions	Experiences expected
<b>Gold Coast</b>	<ul style="list-style-type: none"> <li>• Beaches</li> <li>• Theme Parks</li> </ul>	<ul style="list-style-type: none"> <li>• Relaxation and rejuvenation</li> <li>• Spend quality time with others</li> <li>• Luxury and indulgence</li> <li>• Something the kids would enjoy</li> <li>• Food and wine experiences</li> <li>• An adventure</li> <li>• Enjoyable nightlife/entertainment</li> <li>• Good shopping</li> </ul>
<b>Tropical North Queensland</b>	<ul style="list-style-type: none"> <li>• Nature</li> <li>• Indigenous Culture</li> <li>• Beaches</li> </ul>	<ul style="list-style-type: none"> <li>• Relaxation and rejuvenation</li> <li>• Spend quality time with others<sup>a</sup></li> <li>• Nature based experiences</li> <li>• Luxury and indulgence</li> <li>• Food and wine experiences<sup>a</sup></li> <li>• An adventure</li> <li>• To experience our nation's history<sup>a</sup></li> <li>• Tour around and explore</li> <li>• To discover and learn something new</li> <li>• Enjoyable nightlife/entertainment</li> </ul>
<b>Sunshine Coast</b>	<ul style="list-style-type: none"> <li>• Beaches</li> <li>• Nature</li> </ul>	<ul style="list-style-type: none"> <li>• Relaxation and rejuvenation</li> <li>• Spend quality time with others</li> <li>• Nature based experiences</li> <li>• Luxury and indulgence</li> <li>• Something the kids would enjoy</li> <li>• Food and wine experiences</li> <li>• Tour around and explore<sup>a</sup></li> <li>• Enjoyable nightlife/entertainment</li> <li>• Good shopping</li> </ul>
<b>Northern Rivers</b>	<ul style="list-style-type: none"> <li>• Beaches</li> <li>• Nature</li> </ul>	<ul style="list-style-type: none"> <li>• Relaxation and rejuvenation</li> <li>• Spend quality time with others</li> <li>• Luxury and indulgence</li> <li>• Something the kids would enjoy</li> <li>• Enjoyable nightlife/entertainment<sup>a</sup></li> </ul>
<b>Mid North Coast</b>	<ul style="list-style-type: none"> <li>• Beaches</li> <li>• Nature</li> </ul>	<ul style="list-style-type: none"> <li>• Relaxation and rejuvenation</li> <li>• Spend quality time with others</li> <li>• Nature based experiences</li> <li>• Luxury and indulgence</li> <li>• Something the kids would enjoy</li> <li>• Food and wine experiences</li> <li>• Enjoyable nightlife/entertainment</li> <li>• Good shopping</li> </ul>
<b>South Coast</b>	<ul style="list-style-type: none"> <li>• Beaches</li> <li>• Nature</li> </ul>	<ul style="list-style-type: none"> <li>• Relaxation and rejuvenation</li> <li>• Spend quality time with others</li> <li>• Nature based experiences</li> <li>• Luxury and indulgence<sup>a</sup></li> <li>• Something the kids would enjoy</li> <li>• Food and wine experience<sup>a</sup></li> <li>• Tour around and explore<sup>a</sup></li> <li>• Enjoyable nightlife/entertainment<sup>a</sup></li> <li>• Good shopping<sup>a</sup></li> </ul>
<b>Australia's South West</b>	<ul style="list-style-type: none"> <li>• Food/Wine</li> <li>• Beaches</li> <li>• Nature</li> </ul>	<ul style="list-style-type: none"> <li>• Not available</li> </ul>

<sup>a</sup> Similar score to the benchmark (within +/- 3points).

Source: TRA VPS database (unpublished data)

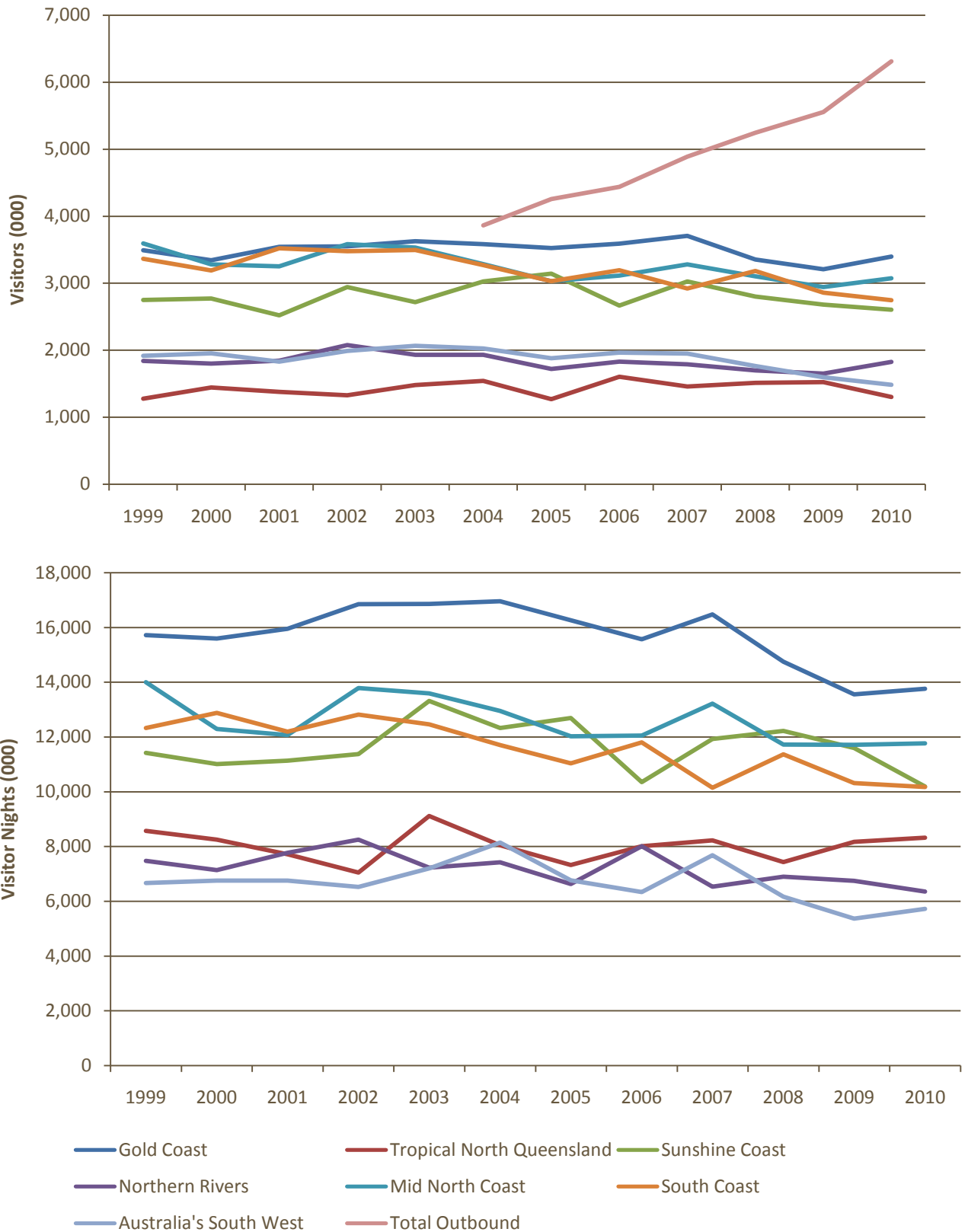
### 3.3 Trends and seasonality

Generally, trends in both domestic and international visitors have been similar across this set of regions and more broadly nationally. Moreover, general declines in domestic visitors have occurred over the past decade, while outbound travel by Australians increased significantly during this time, including to locations offering similar attractions and experiences, e.g. Bali and Fiji.

- Between 1999 and 2010 the average annual growth in domestic visitors ranged from 0.2% per year increase in Tropical North Queensland to 1.8% per year in the South Coast (Figure 2). This compares to a decline of 0.7% per year nationally and 1% per year in regional Australia (excluding capital cities). Visitor nights decreased across the board from between 0.3% per year in Tropical North Queensland to 1.7% per year in the South Coast.
- In contrast, outbound travel increased, on average, by 8.5% per year between 2004 and 2010, with outbound travel to Indonesia increasing at a rate of 13.9% per year and Fiji at 10.2% per year.
- Between 1999 and 2010 average annual growth in international visitors was positive for all regions except Tropical North Queensland, Gold Coast and Mid North Coast (declines of 1%, 0.6% and 0.3% per year respectively)(Figure 3). This is compared with increases both nationally (2.5% per year) and regionally (0.7% per year). International visitor nights increased across the board ranging from 0.5% per year in Tropical North Queensland to 7.1% per year in Australia's South West. This compares to 5.7% nationally.

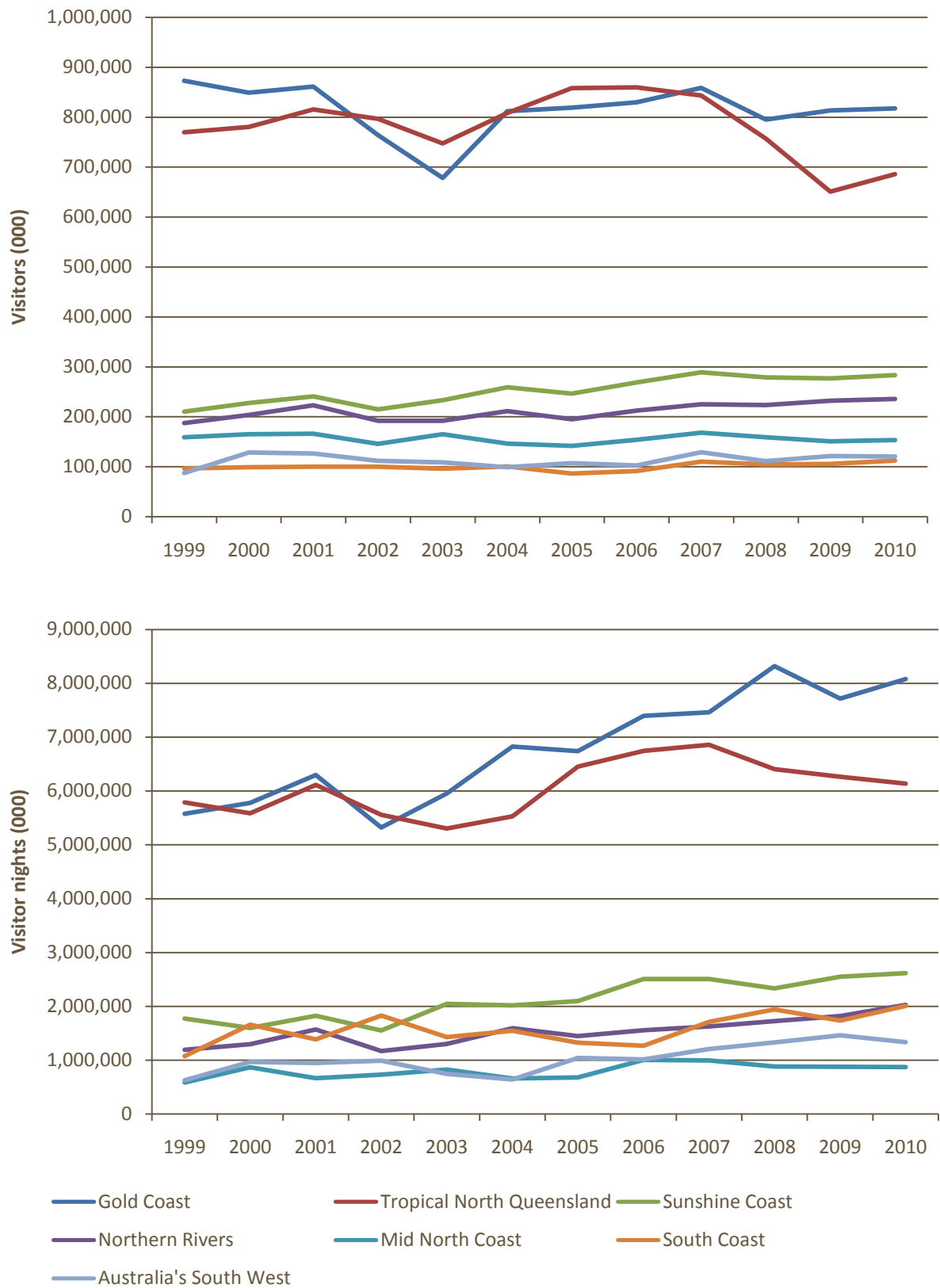
For all regions, other than Tropical North Queensland and the Sunshine Coast, domestic visitor nights are declining at a faster rate than the national average. However, international visitor nights are growing across all regions, albeit at a slower rate than the national average, for all regions other than the South Coast and Australia's South West, which are growing at a faster rate than the national average.

**Figure 2: Domestic overnight visitors and visitor nights by region and total outbound travel, 1999 to 2010**



Note: Outbound travel data only available from 2004 onwards  
 Source: TRA National Visitor Survey

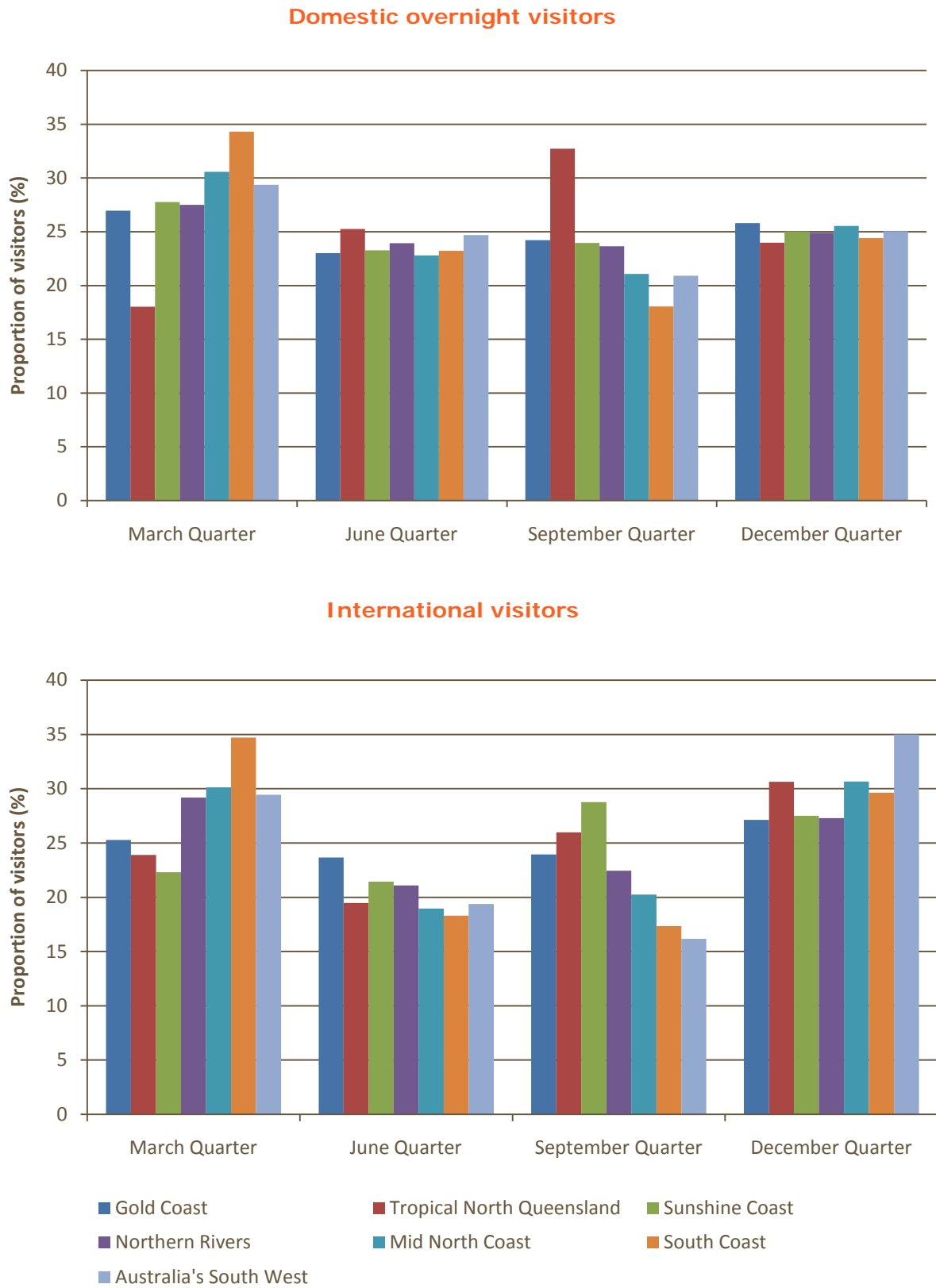
**Figure 3: International visitors and visitor nights by region, 1999 to 2010**



Source: TRA International Visitor Survey

With the exception of the Gold Coast, these regions are highly seasonal (Figure 4). For most the domestic peak season occurs in the March quarter, corresponding with the summer holiday period. A difference occurs in Tropical North Queensland, where their peak occurs in their dry season, which corresponds with the September quarter. Nationally there is a slight peak in the March quarter, although this peak is smaller than those experienced in the regions profiled. International peak seasons are very similar to domestic, with the Sunshine Coast changing from a March to September quarter peak, and Australia's South West summer peak shifting to the December quarter.

**Figure 4: Seasonality by region– Proportion of visitors by quarter, 1999 to 2010**



Source: TRA - International Visitor Survey, National Visitor Survey

As is the case in most areas of Australia, domestic visitors, nights and expenditure outnumber the international figures (Table 3). This is not to say that international visitors to these regions are not important. In 2010, 11% of tourism expenditure in regional Australia (including the Gold Coast) was from international visitors. In terms of the seven regions the contribution of international visitors was:

- highest in Tropical North Queensland (32% of expenditure was from international visitors) and the Gold Coast (21%)
- similar to the benchmark for Northern Rivers (11%) and the Sunshine Coast (11%), and
- lowest in the South Coast (9%), Australia's South West (8%) and the Mid North Coast (3%).

**Table 3: Visitors, nights and expenditure in the region, 2010**

	Gold Coast	Tropical North Queensland	Sunshine Coast	Northern Rivers	Mid North Coast	South Coast	Australia's South West
Domestic Day Expenditure (\$ million)	692	230	358	337	512	397	280
Domestic Day Visitors (000)	6,778	2,113	4,515	3,386	3,737	5,032	2,477
Domestic Overnight Expenditure <sup>a</sup> (\$ million)	2,862	1,440	1,590	846	1,530	1,268	793
Domestic Overnight Visitors (000)	3,396	1,303	2,604	1,826	3,075	2,746	1,482
Domestic Overnight Visitor Nights (000)	13,755	8,321	10,186	6,357	11,760	10,173	5,724
Domestic Repeat Visitors (%)	82	81	84	78	82	77	85
Domestic Average Nights in Region	4	6	4	3	4	4	4
Domestic Average Nights in Australia	5	9	5	6	5	4	5
International Expenditure <sup>b</sup> (\$ million)	955	795	240	150	58	158	89
International Visitors (000)	817	686	283	235	153	112	120
International Nights (000)	8,076	6,137	2,618	2,027	872	2,008	1,334
International Average Nights in Region	10	9	9	9	6	18	11
International Average nights In Australia	34	41	50	70	55	55	49

a - Includes airfares and long distance transport costs

b - Includes package expenditure

Sources: TRA - National Visitor Survey, International Visitor Survey, regional expenditure estimates (2010, unpublished data)

### 3.4 Visitor Profile

Table 4 provides a summary of the typical domestic and international visitor to these regions. Domestic visitors are similar across this set of regions and in most cases they are also similar to national averages. On the other hand, the profile of international visitors is more diverse across these regions. A detailed discussion on the separate regions is in Appendix 1, which profiles each region individually.

The dominant life stages for domestic visitors to these regions are families and older couples, with visitors generally travelling as a family group or as an adult couple. This is similar with national trends. The majority of travel to these regions is made up of intrastate visitors, usually from adjacent regions. The exceptions to this are the Gold Coast and Northern Rivers; however this may be explained by their location adjacent to state borders. The Gold Coast is the only region with a significant number of visitors from non-adjacent interstate regions, particularly from Sydney and Melbourne. There is a high proportion of repeat visitation to this set of regions, with all but the South Coast and Northern Rivers above the national average. Moreover, the fact that, with the exception of Tropical North Queensland, each region is located in the proximity of a major capital city may also assist the levels of repeat visitation.

With the exception of Tropical North Queensland, on average 88% of domestic visitors to these regions travel for either holiday/leisure or VFR, with the majority in the former category. Tropical North Queensland is more in line with the national average, with a larger proportion of business travel (20%). With the exception of Tropical North Queensland, due to its isolation, and the Gold Coast, with its popular airport, the dominant form of transport to these regions for domestic visitors is self-drive.

In terms of international visitors, the dominant reason for travelling is holiday/leisure. Visitors tend to travel to the region alone or as an adult couple and a larger proportion is from Europe. The exceptions are the Gold Coast and Tropical North Queensland where a range of different travel parties travel to the region and a large proportion of visitors travel from Asia. As was the case with domestic visitors, self-drive is the main transport used to get to the region except for Tropical North Queensland.

**Table 4: Typical domestic and international visitor features by region, 2010**

Region	Domestic Overnight	International
<b>Gold Coast</b>	<ul style="list-style-type: none"> <li>Family or adult couple</li> <li>Interstate</li> <li>March and December quarters</li> <li>Self drive or air transport</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple</li> <li>New Zealand or Asia (China, Japan)</li> <li>December quarter</li> <li>Self drive or air transport</li> <li>Holiday/leisure</li> <li>First or repeat trip to Australia</li> </ul>
<b>Tropical North Queensland</b>	<ul style="list-style-type: none"> <li>Family group or adult couple</li> <li>Intrastate</li> <li>September quarter</li> <li>Air transport</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple,</li> <li>Asia (Japan, China) or Europe (UK)</li> <li>December quarter</li> <li>Air transport or self drive</li> <li>Holiday/leisure</li> <li>First trip to Australia</li> </ul>
<b>Sunshine Coast</b>	<ul style="list-style-type: none"> <li>Adult couple or family</li> <li>Intrastate</li> <li>March quarter</li> <li>Self drive</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple</li> <li>New Zealand or Europe (UK)</li> <li>September and December quarters</li> <li>Self drive or long distance coach/rail</li> <li>Holiday/leisure</li> <li>Repeat visitor to Australia</li> </ul>
<b>Northern Rivers</b>	<ul style="list-style-type: none"> <li>Family/adult couple</li> <li>Interstate</li> <li>March quarter</li> <li>Self drive</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple</li> <li>Europe (UK)</li> <li>March quarter</li> <li>Self drive or long distance coach/rail</li> <li>Holiday/leisure</li> <li>First trip to Australia</li> </ul>
<b>Mid North Coast</b>	<ul style="list-style-type: none"> <li>Adult couple or family</li> <li>Intrastate</li> <li>March quarter</li> <li>Self drive</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple</li> <li>Europe (UK)</li> <li>March and December quarters</li> <li>Self drive</li> <li>Holiday/leisure</li> <li>First trip to Australia</li> </ul>
<b>South Coast</b>	<ul style="list-style-type: none"> <li>Family or adult couple</li> <li>Intrastate</li> <li>March quarter</li> <li>Self drive</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple</li> <li>Europe (UK)</li> <li>March and December quarters</li> <li>Self drive</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor to Australia</li> </ul>
<b>Australia's South West</b>	<ul style="list-style-type: none"> <li>Family or adult couple</li> <li>Intrastate</li> <li>March quarter</li> <li>Private/company vehicle</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone/adult couple</li> <li>UK/Europe or Malaysia/Singapore</li> <li>December and March quarters</li> <li>Private/company vehicle</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor to Australia</li> </ul>
<b>Regional Australia (excluding capital cities)</b>	<ul style="list-style-type: none"> <li>Adult couple, family or alone</li> <li>March quarter</li> <li>Intrastate</li> <li>Self drive</li> <li>Holiday/leisure, VFR or business</li> <li>Repeat Visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple</li> <li>New Zealand, Europe (UK) or Asia (Japan)</li> <li>December and March quarters</li> <li>Self drive or air transport</li> <li>Holiday/leisure</li> <li>Repeat visitor to Australia</li> </ul>
<b>National Benchmark</b>	<ul style="list-style-type: none"> <li>Family, adult couple or alone</li> <li>Intrastate</li> <li>March quarter</li> <li>Self drive or air transport</li> <li>Holiday/leisure, VFR or business</li> <li>Repeat Visitor</li> </ul>	<ul style="list-style-type: none"> <li>Alone or adult couple</li> <li>New Zealand, Asia or Europe</li> <li>December and March quarters</li> <li>Self drive or air transport</li> <li>Holiday/leisure or VFR</li> <li>Repeat visitor to Australia</li> </ul>

Source: TRA – National Visitor Survey, International Visitor Survey

### 3.5 Information sources and booking

The internet was the most popular information source for domestic visitors<sup>4</sup> to these regions, especially those in the larger regions of Tropical North Queensland, the Gold and Sunshine Coasts, which had similar proportions as the capital cities. Compared to other regional areas in Australia (excluding capital cities), the proportion that used the internet was higher except for the South Coast, Mid North Coast and Australia’s South West. This trend is also consistent for booking on the internet.

**Table 5: Information sources used across regions**

Region	Internet	Previous Visits	No information sources used
Gold Coast	50%	17%	35%
Tropical North Queensland	51%	16%	27%
Sunshine Coast	42%	17%	40%
Northern Rivers	38%	17%	41%
Mid North Coast	32%	21%	43%
South Coast	30%	24%	41%
Australia’s South West	31%	17%	48%
Regional Australia (excluding capital cities)	33%	18%	42%
National Benchmark	37%	17%	40%

Source: TRA National Visitor Survey

In terms of what visitors booked on the internet, accommodation was the most common item booked across all regions as was air travel for the Gold Coast, Sunshine Coast and Tropical North Queensland and car hire in Tropical North Queensland.

Given the large proportion of domestic repeat visitors in these regions, it is not surprising that previous visits were also a popular source of information for visitors, especially in the South Coast and Mid North Coast. Many visitors report not using any information sources at all, although this is less the case for visitors to Tropical North Queensland and the Gold Coast.

### 3.6 Satisfaction with the region

Overall satisfaction with the destinations was either similar to or above the benchmark<sup>5</sup>. The regions where the destinations were above the benchmark in terms of satisfaction were the Sunshine Coast (59% very satisfied; 92% satisfied overall) and Northern Rivers (55% very satisfied; 92% satisfied overall). On average, the overall satisfaction with the group of destinations as a whole was 53% very satisfied and 88% satisfied overall. This

<sup>4</sup> Information sources in the NVS and IVS are collected at the trip level rather than stopover level. Just under half of international visitors to Australia stop in more than one destination compared to 90% for domestic visitors. Thus inferences between information sources for international visitors at the region level will not be drawn.

<sup>5</sup> Based on 73 destinations in the VPS benchmark database. Destinations within plus/minus three percentage points of the benchmark are considered similar.

is a higher satisfaction than the average of the remaining destinations which was 51% and 85% respectively.

The main drivers of satisfaction in these regions are the local atmosphere, the variety of things to see and do and value for money. This is not unlike other destinations generally. In terms of satisfaction with these attributes, satisfaction levels in the destinations in these regions and destinations more broadly showed little difference.

However, there are a number of attributes where satisfaction levels are higher in these regions compared with destinations in general. These include attributes that would be expected from larger established regions such as commercial accommodation, local transport, tours, shopping and entertainment and nightlife. Satisfaction was lower for some key attributes in these regions including roads, signage and information services. This was more of a case of visitors stating they were more neutral with their satisfaction with the attributes compared with the benchmarks rather than dissatisfied with them.

## **4. Conclusion and implications**

Through forming a profile of the set of regions with larger tourism industries and a higher economic importance of tourism it has become evident that a wide range of similar aspects link the regions together. All are on the coast and have National Parks, with the key experiences and activities in the regions revolving around the beach and nature. These key experiences enable visitors to relax, recharge and take a break from their every day life, all key motivators for Australian consumers to travel. The regions are all easily accessible by both major roads and air travel and offer a range of accommodation establishments. A typical domestic visitor to these regions has visited previously and visits the region for holiday or leisure purposes. Moreover, they travel as an adult couple or family group visiting the region for a week or less. In contrast, a typical international visitor also visits the region for holiday or leisure purposes, but travels alone or as an adult couple and stays for a longer period of time in the region.

Overall, visitors are generally satisfied with their visit to these seven regions, and the drivers of this satisfaction are the local atmosphere, the variety of things to see and do and value for money. Visitors are also very satisfied with the commercial accommodation, local transport, tours, shopping and entertainment and nightlife of these destinations, generally key attributes of larger tourism destinations.

The level of economic importance of tourism in these regions, while emphasising the significance of the tourism industry, also leads to potential vulnerabilities. Each of the regions identified in this report relies on a similar product offering in attracting visitors. They also show a degree of seasonality in the patterns of visitation. Shocks that impact on the desirability of travel or the peak season of these regions would have a potentially large economic impact in the region. Given these regions also contribute significantly to Australia's tourism industry the impact could also affect the economy more broadly.

In recent times Australians choosing to travel to nearby overseas destinations rather than at home has become an important factor for the decline in the domestic tourism industry. The experiences offered by outbound destinations like Indonesia (Bali) and Fiji are similar to those offered by these regions with these destinations having the added bonus of seeming exotic and different, important motivators for Australian consumers

(TRA, 2007). Factors such as increasing air access to outbound destinations, the strong Australian dollar and the value for money proposition offered by these overseas destinations makes this set of highly dependent regions vulnerable to further increases in outbound travel. This is further exaggerated by the key domestic markets for these regions also making up the highest proportion of outbound travellers to these overseas destinations.

When this difficult tourism environment is combined with the fact that domestic consumers are becoming more demanding and discerning with regard to both their time and money (TRA, 2007), it is important that the tourism industry identifies and offers what consumers require from their travel. Therefore, the ability to understand the common drivers and features in these larger tourism dependent regions and what differentiates them from other Australian tourism regions more generally is of value. It is valuable for this set of regions themselves as it indicates what they do well and also areas that potentially require more focus. Finally, other regions broadly around the nation may use these findings to draw key insights and identify opportunities within their own region.

# Appendices

## Appendix A: Individual region profiles

### A1 Gold Coast and Tropical North Queensland

Being the two largest regions in this set by total expenditure, there are a number of important similarities between the Gold Coast and Tropical North Queensland. Most notable is the size of their international visitor base relative to this group of regions.

The Gold Coast and Tropical North Queensland have experienced the slowest growth in international visitors over the past decade, relative to this group and nationally. Countering this is the fact that a high proportion of international visitors to these two regions are from the Asian visitor market (48% and 34% respectively). This also provides an explanation for the high proportion of package trips by international visitors relative to the other regions in this profile.

Domestic visitors to the Gold Coast and Tropical North Queensland are generally similar to other regions, although with a few notable differences. Similar to international visitors, many stay in hotels, resorts or motor inns and use air transport to visit the region. Additionally, domestic visitors come from a diverse base of regions across a number of states, unlike other regions where the majority of domestic visitors reside in adjacent regions.

#### Gold Coast

Possessing the largest tourism industry of the seven profiled regions and trailing only Sydney, Melbourne and Brisbane, the Gold Coast is the fourth largest tourism region in Australia by tourism expenditure. Moreover, of the regions profiled in this report the Gold Coast attracted the largest numbers of domestic and international visitors.

The Gold Coast is a popular destination for international visitors at each life stage, excluding older couples, with parents constituting the largest group (26% of visitors). This is higher than the other profiled regions but is in line with the national benchmark. Moreover, 16% of international visitors travel as a family group, which is not only higher than regions in this profile but also the national average. However, while only 3% of international visitors travel to the region for education purposes, they make up 29% of visitor nights. When coming to the region, visitors use a mix of air (30%), self drive (34%) and charter/tour buses (14%).

While the number of repeat visitors (49%) to the Gold Coast is lower than the national average, this does not seem to be an indication that visitors to the region are unsatisfied. Predominantly visitors expect experiences relating to relaxation, luxury, enjoyable nightlife and good shopping. They are generally satisfied at or above benchmark levels, with a high proportion of visitors satisfied with shopping and nightlife aspects of the region.

## **Tropical North Queensland**

While similar to the Gold Coast, Tropical North Queensland is in other ways the most different from the other regions in this profile, largely due to its location and vast geographical size. There are a large number of accommodation providers in Tropical North Queensland spread evenly across all types. However, 59% of international and 47% of domestic visitors to Tropical North Queensland stay in hotels, resorts, motels and motor inns. These proportions are the highest for this profile and also are above the national average.

Tropical North Queensland is more reliant on the airline industry for transporting visitors to the region, with 57% of international and 51% domestic visitors using air transport, very high figures both in relation to the profiled regions and nationally. Notably, it is the only profiled region with a port; however, while more widely used than in other regions it is not a significant transport method. Tropical North Queensland also differs from other regions in that it has a strong September peak season for domestic visitors and a mixed September/December peak for international visitors.

Relative to the other regions in this profile, Tropical North Queensland has similar numbers of domestic and international visitors. A number of specific facts separate these visitors from each other:

- 49% of domestic visitors spend 3 to 7 nights in Tropical North Queensland, with 15% spending 8 to 14 nights. These figures are the highest for the profile and above the national average.
- 70% of international visitors to Tropical North Queensland are travelling to Australia for the first time. This is the highest proportion for this profile and well above the national average.
- Tropical North Queensland experienced some growth in domestic (overnight and day) visitors and visitor nights over the past decade.

Visitors to Tropical North Queensland are generally satisfied with their experiences, with 53% very satisfied overall. The majority of visitors make their decision to travel more than three months prior, a figure well above the national average. The longer distance that most visitors have to travel to the region may impact upon this decision.

## **A2 Sunshine Coast**

Although similar in geography to the Gold Coast, with its beaches and hinterland, the Sunshine Coast shares more similarities with other regions in this profile than with its Queensland counterparts. While it has the third highest volume of international visitors, it still significantly trails the large international destinations of the Gold Coast and Tropical North Queensland. International visitors to the region are more likely to have visited Australia before (56%). This is unsurprising as the dominant international visitor origin is New Zealand (30%), of whom 97% have previously visited Australia. With only a domestic airport servicing the region and Brisbane airport located only an hour south, international visitors predominantly drive (59%) or use long distance coach/bus (21%) when travelling to the Sunshine Coast. The Sunshine Coast's peak season for international travellers is the September Quarter, while for all other regions (excluding Tropical North Queensland) this is either their off-season or shoulder period. A positive

for the Sunshine Coast is that both international visitors and visitor nights have shown solid upward trends over the past decade in a fairly flat market.

This upward trend in international visitors should be weighed against a distinct fall in daytrips in the last few years. This fall has corresponded with a significant increase of daytrips to the Gold Coast. Given competition from the Gold Coast and Northern Rivers regions this may be of some concern, as 54% of all daytrip visitors to the Sunshine Coast are from the Brisbane region. Moreover, almost half of all domestic overnight visitors to the Sunshine Coast are also from the Brisbane region. This is countered by the high proportion of repeat visitors, with 84% of domestic visitors have previously visited the Sunshine Coast.

Visitors are generally very satisfied with their Sunshine Coast experiences. This is confirmed by figures that show, relative to other regions, visitors to the Sunshine Coast report the highest levels of being very satisfied and to recommend the Sunshine Coast to others.

### **A3 Northern Rivers**

With three domestic airports in the region servicing 83 flights to and from Sydney, 20 flights to and from Melbourne per week, and Gold Coast Airport less than 5 minutes from the region, Northern Rivers is an accessible destination for both domestic and international travellers. When this is combined with its location, the result is a diverse range of domestic visitor origins when compared with the other regions in this group. In the international market Northern Rivers is a focal region for European tourists, with 30% from the UK, 11% from Germany and 29% from other European nations.

As expected, these European visitors drive a significant backpacker market in Northern Rivers, indicated by the following:

- 34% of international visitors use long distance bus/coach to travel to Northern Rivers,
- 48% stay in backpacker hostels,
- 66% are visiting Australia for the first time, and
- 61% are young or midlife singles, with 59% travelling alone.

Domestic visitors to Northern Rivers, however, are likely to be families (41%) or older couples (23%), which is in line with both national averages and this group of regions. Northern Rivers is a region where visitors do not spend long periods of time, with 91% of domestic visitors spending a week or less and 30% just one night. However, it is a region where domestic visitors travel repeatedly, with 78% having previously visited Northern Rivers.

While the proportion of repeat visitors is lower than the benchmark, it does not necessarily indicate that visitors are unsatisfied with the region. This is confirmed by the fact that 55% of visitors to the Kingscliff/Cabarita area were very satisfied, relative to the national benchmark of 51%. Travelling to this area visitors generally expect to relax and rejuvenate (87%) or experience luxury and indulgence (48%). These experiences are usually better than expected and at a level above the national benchmark.

## **A4 Mid North Coast**

The second most reliant region on domestic visitors in this profile, domestic (day and overnight) visitors to the Mid North Coast outnumber international visitors forty four to one. This figure may be influenced by the location of the nearest international airport on the Gold Coast. This reliance should be weighed against the fact that 82% of domestic visitors to the region have previously visited the Mid North Coast. An indication that visitors travel to the Mid North Coast at regular intervals is the fact that 46% of visitors decided to travel to the region more than three months before their trip, well above the national average of 30%. Moreover, while visitors are generally satisfied with the Mid North Coast, a high proportion are very satisfied specifically with important trip aspects, which include attractions, local atmosphere and personal security and safety. Also contributing to the high numbers of domestic visitors is the Mid North Coast's location in relation to the large population centres of the Hunter and Sydney. The typical domestic traveller to the Mid North Coast is either a family or older couple who drives to the region and stays for a week or less in a hotel, resort or motor inn or at a friend's or relatives property.

While not representing a large proportion of the total, international visitors to the Mid North Coast do represent a different group than those in other regions. This is possibly due to the Mid North Coast being the only region in this profile that does not have an international airport or is located adjacent to a region with one. Similarly to Northern Rivers, young and midlife singles represent a high proportion (43%) of international visitors to the region. This group of travellers is coupled with the high proportion of older single international visitors (22%), which helps push the higher than average use of caravan accommodation (26%).

## **A5 South Coast**

One of the most diverse regions out of the seven profiled, thanks in large part to its size and industries, the economic importance of tourism is the second lowest for the South Coast region. While this is the case, the South Coast has a very large and important domestic visitor market, where domestic visitors outnumber international visitors sixty nine to one. For domestic visitors and visitor nights, the South Coast has the largest peak season out of any of the regions, occurring in the March Quarter, which may place strain on the region at other periods of the year. The South Coast does have a high proportion of repeat domestic visitors (77%), most of whom come from the adjacent Sydney region. More than half (59%) of daytrip and 44% of overnight visitors to the South Coast travel from the Sydney region.

Although relatively small, the profile of international visitors to the South Coast is idiosyncratic, relying more on the international student market than other regions. Just over one in ten (11%) of international visitors spend 28 days or more in the South Coast, more than any of the other regions in this report, a figure clearly driven by education visitors. While only 7% of visitors travel for education, 56% of international visitor nights are attributable to education visitors. Moreover, 57% of visitors have previously visited Australia before. This figure is influenced by visitors from New Zealand, China and other Asian nations. Visitors from these nations to the South Coast have visited Australia on a previous occasion 96%, 69% and 67% respectively.

## **A6 Australia's South West**

The only region not on the east coast of Australia, Australia's South West provides some valuable insights through its different geographical location. With regional tourism expenditure of \$881 million, 1.6 million visitors and 7.1 million visitor nights, Australia's South West is one of the smaller regions ranking sixth out of the seven regions for each of these measures. However, it is also the least economically dependent on tourism out of these seven regions, which can be attributed partly to the presence of the mining industry in the region. Contributing to its size is the fact that it has the fewest accommodation establishments and tourism businesses.

Although small, Australia's South West is a region that visitors return to; with a high proportion (85%) of repeat domestic visitors. This figure is most likely driven by the fact that 90% of domestic visitors to the region come from Western Australia, with 72% alone from the neighbouring Perth region. For international visitors to the region, 68% have visited Australia on a previous occasion. This is assisted by the location of Perth Airport less than two hours from the region. The magnitude of this figure is driven by repeat visits to Australia by Asian tourists. Being located on the West Coast makes Australia's South West a desirable location for visitors from the UK, Singapore and Malaysia, which constitute 24%, 10% and 6% of international visitors, respectively. The presence of agricultural and mining industries in the region leads to a greater presence of international visitors nights taken up by employment purposes, relative to regions in this group and also nationally.

With 92% of domestic visitors spending a week or less in the region, Australia's South West can be seen as a shorter visit location. Its adjacency to Perth makes two night visits (29% of total visits) for families and older couples (38% and 28% of total domestic visitors respectively) popular. While only 14% of trips are package, this is the highest proportion of the seven regions.

## Appendix B: Detailed Results

**Table B1: Proportion of overnight domestic overnight visitors by lifecycle group, 2010 (%)**

Tourism region	Young/midlife singles, no kids	Young/midlife couple, no kids	Families	Older singles	Older couples
Gold Coast	19	9	41	6	24
Tropical North Queensland	15	8	43	9	25
Sunshine Coast	15	14	40	7	25
Northern Rivers	19	10	41	6	23
Mid North Coast	15	9	38	7	31
South Coast	17	9	42	7	24
Australia's South West	17	10	38	7	28
<b>Regional Australia (excluding capital cities)</b>	<b>17</b>	<b>10</b>	<b>39</b>	<b>8</b>	<b>26</b>
<b>National average</b>	<b>17</b>	<b>10</b>	<b>39</b>	<b>8</b>	<b>25</b>

Source: TRA National Visitor Survey

**Table B2: Proportion of international visitors by lifecycle group, 2010 (%)**

Tourism region	Young/midlife singles, no kids	Young/midlife couple, no kids	Families	Older singles	Older Couples
Gold Coast	33	16	26	5	20
Tropical North Queensland	38	18	18	6	20
Sunshine Coast	39	14	14	8	25
Northern Rivers	61	15	8	5	12
Mid North Coast	43	15	12	7	22
South Coast	35	14	17	9	26
Australia's South West	28	12	19	12	29
<b>Regional Australia (excluding capital cities)</b>	<b>32</b>	<b>14</b>	<b>22</b>	<b>8</b>	<b>23</b>
<b>National average</b>	<b>33</b>	<b>13</b>	<b>27</b>	<b>7</b>	<b>20</b>

Source: TRA International Visitor Survey

**Table B3: Proportion of domestic overnight visitors by travel party, 2010 (%)**

Tourism region	Alone	Adult couple	Family group	Friends and/or relatives	Other
Gold Coast	17	27	33	18	5
Tropical North Queensland	20	26	27	18	9
Sunshine Coast	15	32	30	21	3
Northern Rivers	19	27	32	19	4
Mid North Coast	13	34	31	19	3
South Coast	15	29	34	18	4
Australia's South West	16	30	27	22	5
<b>Regional Australia (excluding capital cities)</b>	<b>20</b>	<b>27</b>	<b>27</b>	<b>19</b>	<b>7</b>
<b>National average</b>	<b>25</b>	<b>26</b>	<b>24</b>	<b>17</b>	<b>7</b>

Source: TRA National Visitor Survey

**Table B4: Proportion of international visitors by travel party, 2010 (%)**

Tourism region	Alone	Adult couple	Family group	Friends and/or relatives	Other
Gold Coast	37	29	16	14	4
Tropical North Queensland	37	34	12	15	2
Sunshine Coast	48	32	8	11	1
Northern Rivers	59	21	4	16	0
Mid North Coast	50	31	7	12	0
South Coast	56	28	7	8	1
Australia's South West	43	36	8	12	1
<b>Regional Australia (excluding capital cities)</b>	<b>46</b>	<b>29</b>	<b>11</b>	<b>11</b>	<b>3</b>
<b>National average</b>	<b>56</b>	<b>22</b>	<b>9</b>	<b>9</b>	<b>4</b>

Source: TRA International Visitor Survey

**Table B5: Proportion of domestic overnight visitors by origin, 2010 (%)**

Tourism region	Interstate	Intrastate
Gold Coast	54	46
Tropical North Queensland	40	60
Sunshine Coast	28	72
Northern Rivers	54	46
Mid North Coast	15	85
South Coast	25	75
Australia's South West	10	90
<b>Regional Australia (excluding capital cities)</b>	<b>24</b>	<b>76</b>
<b>National average</b>	<b>34</b>	<b>66</b>

Source: TRA National Visitor Survey

**Table B6: Proportion of international visitors by origin, 2010 (%)**

Tourism region	New Zealand	Japan	Singapore	Malaysia	China	Other Asia	USA/ Canada	United Kingdom	Other Europe	Other Countries
Gold Coast	24	13	3	4	15	13	6	8	9	5
Tropical North Queensland	5	16			11	6	15	15	26	5
Sunshine Coast	30	1	1	1		3	9	23	27	5
Northern Rivers	8	2	1	1		2	11	30	39	6
Mid North Coast	9	1	1		1	6	16	27	35	4
South Coast	12	2	1	1	4	9	16	22	26	6
Australia's South West	9	2	10	6	1	8	8	29	22	5
<b>Regional Australia (excluding capital cities)</b>	<b>19</b>	<b>10</b>	<b>3</b>	<b>2</b>	<b>7</b>	<b>10</b>	<b>11</b>	<b>14</b>	<b>17</b>	<b>6</b>
<b>National average</b>	<b>19</b>	<b>7</b>	<b>5</b>	<b>4</b>	<b>8</b>	<b>16</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>7</b>

Source: TRA International Visitor Survey

**Table B7: Proportion of domestic overnight visitors by whether visited the region before, 2010 (%)**

Tourism region	First time visitor	Repeat visitor
Gold Coast	18	82
Tropical North Queensland	19	81
Sunshine Coast	16	84
Northern Rivers	22	78
Mid North Coast	18	82
South Coast	23	77
Australia's South West	15	85
<b>Regional Australia (excluding capital cities)</b>	<b>21</b>	<b>79</b>
<b>National average</b>	<b>20</b>	<b>80</b>

Source: TRA National Visitor Survey

**Table B8: Proportion of international visitors by whether visited Australia before, 2010 (%)**

Tourism region	First time visitor	Repeat visitor
Gold Coast	51	49
Tropical North Queensland	70	30
Sunshine Coast	44	56
Northern Rivers	66	34
Mid North Coast	60	40
South Coast	43	57
Australia's South West	32	68
<b>Regional Australia (excluding capital cities)</b>	<b>46</b>	<b>54</b>
<b>National average</b>	<b>37</b>	<b>63</b>

Source: TRA International Visitor Survey

**Table B9: Proportion of domestic overnight visitors by purpose of visit, 2010 (%)**

Tourism region	Holiday/leisure	Visiting friends and/or relatives	Business	Other
Gold Coast	59	29	9	3
Tropical North Queensland	56	23	20	2
Sunshine Coast	59	31	6	3
Northern Rivers	52	36	9	4
Mid North Coast	61	30	7	4
South Coast	61	29	9	3
Australia's South West	62	27	10	3
<b>Regional Australia (excluding capital cities)</b>	<b>51</b>	<b>32</b>	<b>14</b>	<b>4</b>
<b>National average</b>	<b>45</b>	<b>33</b>	<b>19</b>	<b>6</b>

Source: TRA National Visitor Survey

**Table B10: Proportion of international visitors by purpose of visit, 2010 (%)**

Tourism region	Holiday/leisure	Visiting friends and/or relatives	Business	Education	Other
Gold Coast	78	15	5	3	1
Tropical North Queensland	91	5	3	2	2
Sunshine Coast	79	18	2	2	1
Northern Rivers	87	10	2	2	1
Mid North Coast	84	15	1	1	1
South Coast	59	27	6	7	3
Australia's South West	79	19	3	1	3
<b>Regional Australia (excluding capital cities)</b>	<b>73</b>	<b>23</b>	<b>7</b>	<b>3</b>	<b>4</b>
<b>National average</b>	<b>54</b>	<b>36</b>	<b>17</b>	<b>9</b>	<b>8</b>

Source: TRA International Visitor Survey

**Table B11: Proportion of domestic overnight visitors by transport used to travel to region, 2010 (%)**

Tourism region	Air transport	Self drive	Other
Gold Coast	36	61	4
Tropical North Queensland	51	50	7
Sunshine Coast	17	80	4
Northern Rivers	13	84	3
Mid North Coast	5	92	3
South Coast	3	91	6
Australia's South West	4	92	4
<b>Regional Australia (excluding capital cities)</b>	<b>14</b>	<b>83</b>	<b>6</b>
<b>National average</b>	<b>25</b>	<b>72</b>	<b>7</b>

Source: TRA National Visitor Survey

**Table B12: Proportion of international visitors by transport used to travel to region, 2010 (%)**

Tourism region	Air transport	Self drive	Long distance coach/rail	Charter or tour bus	Other
Gold Coast	30	34	10	14	16
Tropical North Queensland	57	20	9	12	17
Sunshine Coast	10	59	23	6	13
Northern Rivers	8	52	36	6	3
Mid North Coast	7	66	20	8	1
South Coast	9	78	10	2	7
Australia's South West	7	88	6	2	2
<b>Regional Australia (excluding capital cities)</b>	<b>39</b>	<b>49</b>	<b>13</b>	<b>13</b>	<b>18</b>
<b>National average</b>	<b>34</b>	<b>49</b>	<b>8</b>	<b>11</b>	<b>44</b>

Source: TRA International Visitor Survey

**Table B13: Proportion of domestic overnight visitors by accommodation, 2010 (%)**

Tourism region	Hotel, resort, motor inn	Rented house/serviced apartment	Caravan or camping	Friends and/or relatives properties	Other
Gold Coast	34	26	6	30	5
Tropical North Queensland	47	17	12	27	7
Sunshine Coast	23	21	12	38	6
Northern Rivers	26	13	21	37	5
Mid North Coast	29	17	19	30	8
South Coast	19	12	23	37	11
Australia's South West	22	17	19	34	11
<b>Regional Australia (excluding capital cities)</b>	<b>29</b>	<b>13</b>	<b>17</b>	<b>36</b>	<b>11</b>
<b>National average</b>	<b>34</b>	<b>12</b>	<b>12</b>	<b>39</b>	<b>9</b>

Source: TRA National Visitor Survey

**Table B14: Proportion of international visitors by accommodation, 2010 (%)**

Tourism region	Hotel, resort, motor inn	Rented house/serviced apartment	Caravan or camping	Friends and/or relatives properties	Backpackers	Other
Gold Coast	48	20	3	17	10	5
Tropical North Queensland	59	10	7	6	25	6
Sunshine Coast	17	24	12	22	27	5
Northern Rivers	14	8	18	14	48	4
Mid North Coast	31	5	26	17	21	6
South Coast	30	12	20	33	4	10
Australia's South West	31	26	19	22	9	10
<b>Regional Australia (excluding capital cities)</b>	<b>47</b>	<b>20</b>	<b>12</b>	<b>27</b>	<b>14</b>	<b>13</b>
<b>National average</b>	<b>49</b>	<b>22</b>	<b>6</b>	<b>41</b>	<b>11</b>	<b>11</b>

Source: TRA International Visitor Survey

**Table B15: Proportion of domestic overnight visitors by length of stay in region, 2010 (%)**

Tourism region	1 night	2 nights	3 to 7 nights	8 to 14 nights	15+ nights
Gold Coast	23	22	44	10	2
Tropical North Queensland	15	15	49	15	7
Sunshine Coast	25	25	39	9	2
Northern Rivers	30	26	35	8	1
Mid North Coast	20	28	43	8	2
South Coast	22	28	41	8	1
Australia's South West	19	29	44	6	2
<b>Regional Australia (excluding capital cities)</b>	<b>29</b>	<b>29</b>	<b>40</b>	<b>7</b>	<b>2</b>
<b>National average</b>	<b>32</b>	<b>29</b>	<b>39</b>	<b>6</b>	<b>2</b>

Source: TRA National Visitor Survey

**Table B16: Proportion of international visitors by length of stay in region, 2010 (%)**

Tourism region	1 night	2 nights	3 to 7 nights	8 to 14 nights	15 to 27 nights	28+ nights
Gold Coast	10	24	46	11	3	5
Tropical North Queensland	3	18	57	13	4	5
Sunshine Coast	13	17	46	13	6	6
Northern Rivers	18	21	44	8	4	5
Mid North Coast	28	24	35	8	2	3
South Coast	21	19	33	10	7	11
Australia's South West	8	19	51	11	5	7
<b>Regional Australia (excluding capital cities)</b>	<b>16</b>	<b>21</b>	<b>38</b>	<b>12</b>	<b>5</b>	<b>8</b>
<b>National average</b>	<b>12</b>	<b>16</b>	<b>37</b>	<b>14</b>	<b>8</b>	<b>14</b>

Source: TRA International Visitor Survey

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