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THE BEACH, BUSH AND BEYOND:
UNDERSTANDING REGIONAL DISPERSAL OF AUSTRALIAN TOURISTS

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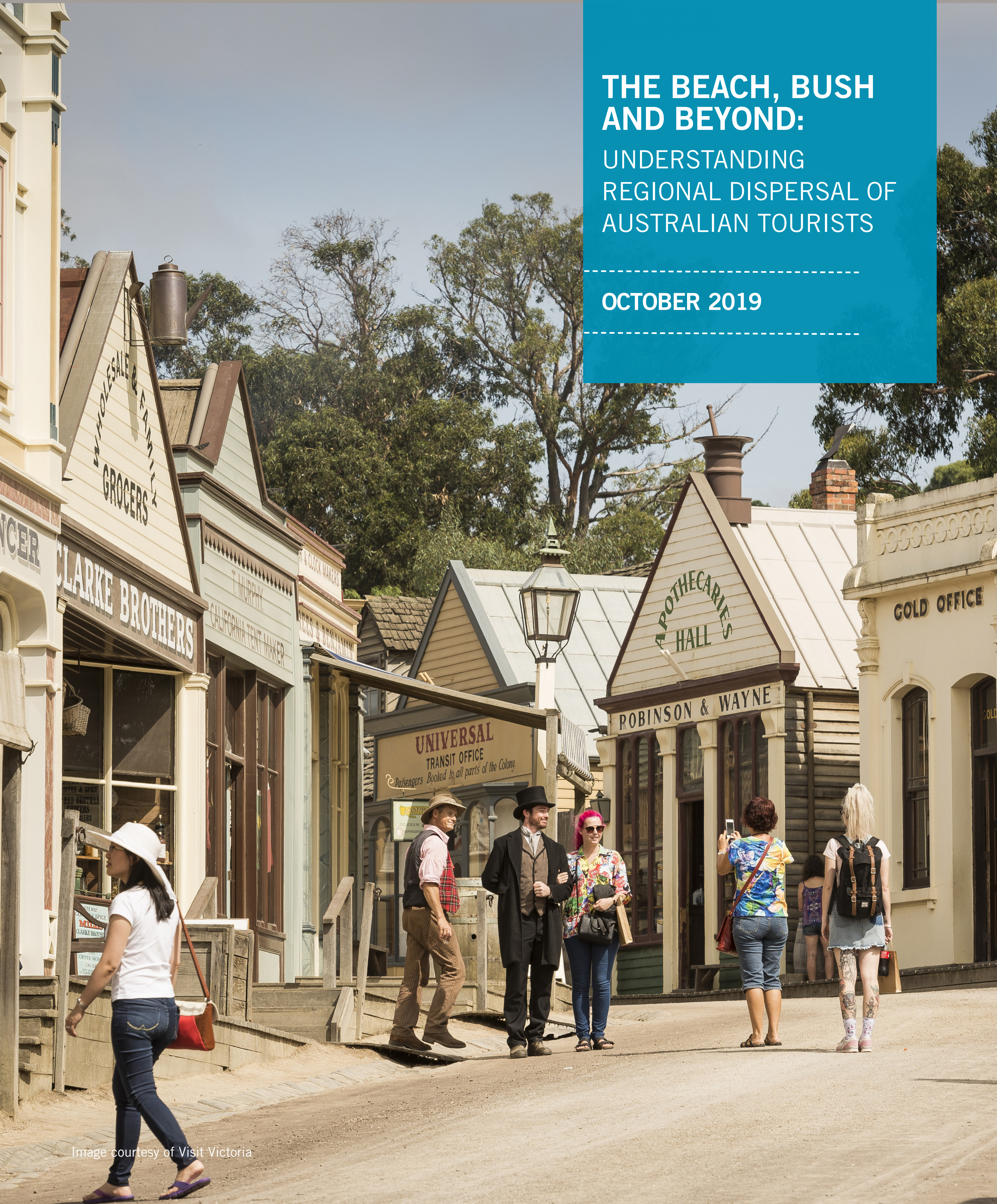

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Tourism is a significant industry in Australia. In 2017–18, there were more than 9 million international trips to Australia, and another 100 million domestic overnight trips within Australia. At the same time, tourism spend was at a record high of $131 billion. Tourism as a sector represents 3.2% of Australia's gross domestic product and employs one-in-twenty Australians.

The influence of tourism is especially important in regional Australia, contributing 4.2% to its gross regional product in 2016–17. This compares to just 2.7% in capital cities and the Gold Coast.

Encouraging more Australians and international visitors to venture beyond the capital cities and major centres is, therefore, a priority for the Australian tourism industry. Tourism Research Australia, in partnership with tourism organisations from every state and territory, commissioned Deloitte Access Economics to undertake research into travel behaviour, patterns, trends and sentiment to gain a greater understanding of the motivations for, and barriers to, regional dispersal. This research will inform policy development, marketing campaigns, and product development, as well as help identify the most suitable areas for future investment.

Image courtesy of Tourism Australia

KEY MESSAGES

ASIAN MARKETS ARE LESS LIKELY TO DISPERSE

- The continued strong growth in Asian markets has contributed to a decrease in the overall propensity for international visitors to visit regional areas, as Asian visitors are less likely to disperse regionally.

REGIONAL DISPERSAL IS SHALLOW FOR ALL VISITORS

- Regional dispersal for international and domestic visitors is shallow, concentrated in destinations close to capital cities and coastal centres.
- Day trips are the main source of international tourism for some of these regional destinations, as they find it difficult to convert international day trips to overnight stays.

FRIENDS AND RELATIVES ARE A KEY MOTIVATION FOR REGIONAL TRAVEL

- Domestic travellers often go to great lengths to reconnect with their friends and relatives around the country, and are motivated by the convenience and affordability of regional areas.
- Among international visitors, a chance to spend quality time with friends and relatives was their main reason for travelling to regional Australia.
- As a multicultural nation with high migration, Visiting Friends and Relatives (VFR) travel could drive regional international visitation.

NATURE-BASED OFFERINGS BRING VISITORS FROM FAR AND WIDE

- Nature-based (10% of responses) and bucket-list holidays (9%) were the second and third most popular reasons for regional visitation among international visitors.
- With Australia's varied natural landscape and unique fauna and flora best enjoyed outside of capital cities, this desire for nature-based experiences has the potential to be a key driver of regional visitation.

TIME AND MONEY MATTERS

- Time and money were the top constraints for domestic travellers who had not visited regional Australia in the past two years.
- International visitors also reported that the selection of destinations on their trip were constrained by time and cost.

SOME VISITORS SIMPLY PREFER CITY DESTINATIONS OVER REGIONAL ONES...

- One-in-ten domestic and international travellers who had not visited regional Australia in the past two years said that they had not done so simply because they prefer to visit capital cities.
- Reasons driving these preferences were the shopping and dining experiences available, as well as the ease of getting there.
- The most popular reason for visiting capital cities for international travellers was that they offer a greater variety of things to see and do.

...AND SOME DOMESTIC TRAVELLERS JUST PREFER OVERSEAS DESTINATIONS

- One-in-ten domestic travellers preferred visiting overseas destinations rather than regional Australia.
- This group had higher than average household income and three-quarters were capital city residents.

THERE'S A LACK OF AWARENESS OF WHAT IS ON OFFER IN REGIONAL AUSTRALIA – PARTICULARLY FOR CHINESE VISITORS

- Not knowing enough about regional Australia was the second largest barrier for international visitors.
- 11% of Chinese respondents noted that more information, particularly access to popular itineraries, would influence them to visit regional destinations.

INTERNATIONAL VISITORS CHOOSE DAY TRIPS OVER AN OVERNIGHT STAY IN REGIONAL AUSTRALIA FOR PRACTICAL REASONS

- International travellers who had visited regional Australia on a day trip at least once in the past five years did not stay overnight because they:
  - were content with a day
  - were part of a tour
  - did not have the time.

RECOMMENDATIONS

WHAT WE NEED TO DO TO ENCOURAGE REGIONAL TRAVEL

1 SHOW THEM WHAT'S ON OFFER

A lack of information and understanding about what they can do and see in regional Australia is impacting visitors' likelihood of visiting and/or staying longer and spending more in our regions. We need to focus on showing visitors the extensive range of activities, accommodation, attractions, dining options, and unique experiences that regional Australia offers.

2 DEMYSTIFY TIME AND DISTANCE

We know time and distance are significant barriers to visiting regional Australia. When choosing where to travel, trade-offs are made between the value that travellers perceive they will get from visiting a destination and the time and money they have available.

Given the dominance of regional destinations in close proximity to capital cities, demystifying time and distance will be critical in encouraging visitors to travel beyond the regional hot spots and into the wider landscape of regional Australia.

3 PUT THE PIECES OF THE JOURNEY TOGETHER

The old adage that we don't know what we don't know holds true when it comes to regional travel. Without knowing someone who has been there before, potential visitors are largely unaware of the possibilities open to them in regional areas.

Behavioural economics show that when faced with many decisions and uncertainties, people choose the path of least resistance. This means we need to put the pieces of the journey together for visitors during their decision making process.

HOW WE CAN DO IT

1

- *Play to the region's strengths by leveraging known competitive advantages – culture, nature and outdoors, wildlife, beaches and waterways.*
  - Tailor regional marketing to those actively seeking the experiences.
  - The Asian VFR market values gaining knowledge, natural attractions and iconic wildlife when choosing a destination. Supplying their hosts with in-language marketing collateral that includes booking information will make the experiences more accessible to those with limited English.
- *Promote 'anchor attractions' and build out a broader list of things to see and do before or after the attraction.*
  - Dubbo leverages the pulling power of Taronga's Western Plains Zoo. Capturing potential visitors at the 'inspire' phase of their decision journey is an opportunity to provide information about a region's Indigenous history, natural beauty and caves to encourage them to stay longer.
- *Maintain contact with previous visitors to a region as their reflections are an insight into the 'inspire' phase of decision making – but also educate them on what else they can see and do in the region.*
  - Use social media, relationship management systems and local news media to promote upcoming festivals and events, new investments and attractions to build ongoing relationships with visitors and foster an affinity with the region.

2

- *Give potential visitors the facts on time and distance so they can make informed decisions about regional destinations. Don't lose people at the 'inspire' phase of the travel journey because they think regional Australia is too far away.*
  - Visit Fraser Coast provides details on the flight time from Brisbane and Sydney as well as the train, bus and car times from Brisbane. Visitors learn that a three- hour drive north of Brisbane can have them seeing humpback whales in their natural environment.
- *Break up regional Australia into manageable 'chunks' when marketing, particularly to international markets. Australian states are larger than many countries, making travel there a daunting task for many.*
  - Ballina Airport is marketed as the gateway to Byron Bay, despite being a 30-minute drive away. Visitors recognise Byron Bay as a discrete destination, but through marketing and branding are encouraged to explore the broader Northern Rivers region.
- *Market options for regional travel in conjunction with city stays – demonstrate that many outstanding regional destinations are within a short distance from the major tourist centres. This will give visitors a taste of what regional Australia has to offer.*

3

- *Make choosing regional destinations easy by developing tailored itineraries for different traveller types.*
  - Margaret River provides a number of self-drive itineraries for visitors, including a number of different wine tours, as well as itineraries for nature lovers, dog owners, families, luxury seekers, and special occasions.
- *Encourage neighbouring regions to develop joint marketing strategies and itineraries to educate visitors about what is on offer in the wider region and encourage visitors to stay longer.*
  - Australia's Dinosaur Trail is a joint initiative educating visitors about what to do, how long it takes and what can be seen on the journey between three towns in outback Queensland.
- *Use insights from behavioural economics to make the decision process easier.*
  - Provide information to visitors on what others with a similar profile have seen and done – this can help in narrowing down the choices. This is similar to the way that booking aggregators use 'you may also like' or 'other people are looking at this hotel'.

TOURISM IN REGIONAL AUSTRALIA, 2017–18

- There were 66 million overnight visitors to regional Australia (61% of overnight visitors):
  - 2.8 million were international (31% of total international visitors)
  - 63.1 million were domestic overnight (63% of total domestic overnight visitors).
- Nights spent in regional Australia have increased 30% over the past decade to 282 million:
  - Three-in-five domestic leisure nights were spent in regional Australia
  - Only one-in-five international leisure visitor nights were in the regions.
- Day trips to regional Australia numbered 112 million (56% of all day trips).
- $51.5 billion (44% of spend) was spent in regional Australia:
  - 92% by domestic visitors
  - 75% by leisure visitors (international and domestic).
- Domestic overnight leisure visitors provided half of total spend (50%) in regional Australia.
- International leisure visitors spent more per regional visit than domestic travellers.
- The average length of stay for domestic travellers in regional Australia has remained relatively stable (now at 3.7 nights), while international declined to 17.7 nights from a high of 22.7 nights in 2012–13.

WHO IS MORE LIKELY TO VISIT REGIONAL DESTINATIONS?

While the propensity to visit regional Australia is affected by a number of factors (such as an individual's life stage, spending power, travel purpose, available time, and whether they are a domestic or international visitor), generally, the following visitor types are more likely to travel to regional areas:

- domestic (over international)
- older domestic and international visitors
- holiday visitors
- leisure visitors (those travelling for the purpose of holiday and/or visiting friends and relatives, combined)
- those from traditional European markets and New Zealand.

Image courtesy of TEQ

TABLE 1: PROPENSITY OF TOURISTS TO VISIT REGIONAL AREAS

ATTRIBUTE	INTERNATIONAL	DOMESTIC
Age	Older visitors are more likely to disperse and stay longer.	Older visitors are more likely to disperse and stay longer.
Purpose of visit	Visitors coming to Australia for work (3% of the international market) are more likely to disperse and stay longer. This is largely driven by the regional requirements of Australia's Working Holiday Maker Program. Holiday visitors (48% of the international market) are the second most likely group to disperse regionally.	Holiday visitors (33% of the domestic market) are more likely to travel to regional destinations and stay longer. This reflects the highly urbanised nature of Australia's population.
Travel party	Adult couples (21% of the international market) and friends and relatives groups (11% of the international market) are the most likely to disperse regionally. Solo travellers (52% of the international market) stay the longest.	Business groups (6% of the domestic market) and family groups (20%) are more likely to have a greater propensity to travel to regional destinations and stay longer.
Household income	-	Visitors with a household income less than $100,000 per year (31% of the domestic market) are more likely to visit regional destinations and stay longer.
Origin	Visitors from European markets (19% of the international market) have a higher propensity to travel to regional destinations and stay longer. They are also the largest working holiday cohort.	Those from a capital city (55% of the domestic market) are slightly more likely to visit a regional area, but have shorter stays than regional residents. Intrastate visitors (69% of the domestic overnight market) are more likely to travel to regional areas, but interstate visitors stay longer.
Package travellers	Package travel visitors (15% of the international market) are slightly more likely to travel to regional destinations, but stay for significantly shorter periods.	-
Previous visits to Australia	Return visitors to Australia are more likely to disperse, but tend to stay for shorter periods than first-time visitors.	-

THE FOCUS IS ON LEISURE VISITORS

While all categories of visitor contribute to Australia's tourism economy, leisure visitors (those travelling for the purpose of holiday and/or visiting friends and relatives) are the focus of this report for two reasons:

- They have the most significant impact on the visitor economy, accounting for more than 80% of international visitors to Australia and 73% of domestic overnight trips. These market shares are even more pronounced when considering regional Australia.
- Their travel decisions are highly flexible and more likely to be influenced by the impacts of policy and planning decisions, marketing campaigns, the offerings of tourism operators and perceived value for money.

While leisure visitors represented 89% of regional visitors in 2017 (slightly up on the 88% figure a decade earlier), they only accounted for 74% of spend (compared with 79% in 2007). Although this means visitors to regional Australia spend less on average, it also means there is scope to increase their share of spend.

TABLE 2: LEISURE VISITORS AS A SHARE OF VISITORS, NIGHTS AND SPEND IN CAPITAL CITIES AND REGIONAL AUSTRALIA, 2017

	VISITORS (%)	NIGHTS (%)	SPEND (%)
Capital cities or Gold Coast	78.9	55.6	46.2
Regional	88.9	73	74.4
Capital cities or Gold Coast	65.9	69.6	54
Regional	78	77.4	73.4

INTERNATIONAL DOMESTIC OVERNIGHT

LEISURE VISITOR NIGHTS

- International leisure visitors spent three times as many nights in capital cities and the Gold Coast (108 million nights) than in regional destinations (36 million nights). The capital city/Gold Coast nights have also been increasing at a faster rate than nights in regional Australia.
- Capital cities and the Gold Coast have seen a 4.7% five-year compound annual growth rate (CAGR) in international nights over the past decade, compared to a 3.3% CAGR in regional Australia over the same period.
- Domestic leisure visitors, however, spent more nights in regional destinations (175 million nights) than capital cities and the Gold Coast (87 million nights).

AVERAGE LENGTH OF STAY

- There has been a downward trend in trip length for international leisure visitors in regional Australia since 2013, falling from 18.1 nights to 15.0 nights in 2017.
- While the decline in length of stay has been occurring for a longer time period among Western markets, length of stay has been falling among Eastern markets as well.
- The average length of stay of domestic leisure visitors in regional Australia has remained reasonably stable, dipping only slightly in recent years.

LEISURE DAY TRIPS

- Day trips are a growing force in regions adjacent to the big cities. Between 2004 and 2017, the number of leisure day trips grew an average of 3% annually and now total approximately 86 million trips per year.
- Day trips account for 90% of all international visitors to the Blue Mountains, as well as 89% of those to Phillip Island and 85% of those to Ballarat and the Barossa – these regions also benefit from strong growth from the low dispersing Asian market.
- Most international day trips[1] in regional Australia are to destinations within close proximity to capital cities, as international visitors consider that time and cost are significant barriers to visiting regional Australia.
- While day trips provide a taste of regional Australia, the industry is working towards converting day trips into overnight stays in an effort to increase the economic benefit of tourism to regional communities and relieve pressure on transport and other infrastructure.
- While the average spend of a leisure visitor on a day trip is well below that of an overnight visitor, total day trip spend reached a substantial $9.0 billion in 2017.During the same period, domestic overnight leisure visitors spent $24.4 billion.
- Visitors on a day trip often noted that one day was enough time to spend in a region.

1 Estimates of international day trips are sourced from the International Visitor Survey. For more information, see the methodology section.

REGIONAL LEISURE HOT SPOTS

- International leisure visitor trips are highly concentrated in Australia's two biggest cities, Sydney and Melbourne (collectively 67% of visitors and 47% of nights).
- Regional Queensland also captures a substantial share of international leisure visitors (19% of visitors and 9% of nights), mostly driven by tourism to the Great Barrier Reef.
- Dispersal in the Northern Territory is driven by visitation to Uluru.
- NSW and Victoria have relatively low regional visitation shares due to the pulling power of their respective capital cities.
- The most popular regional destinations among domestic and international leisure visitors show a very similar geographic pattern: other than the Great Barrier Reef for international tourists, both domestic and international markets are primarily concentrated on regional destinations near gateway cities.

EXAMINING LEISURE DISPERSAL THROUGH PERSONAS

The leisure visitor market was divided into eleven personas[2], with each persona matching key market segments via common demographic and psychographic attributes. This persona-based approach is complemented with surveys to provide deeper insights into the travel behaviours of this segment to enable more effective policy and marketing measures.

- Targeting those personas most likely to visit regional Australia may create an opportunity, as these visitors already have a preference for regional Australia and it may be a case of demonstrating what is on offer to help in the decision-making process.
- Destinations looking to grow a new market offering may focus on encouraging those personas least likely to visit regional Australia today, but are willing to visit if barriers can be overcome.

2 For more information on each persona, see the methodology section

Image courtesy of TEQ

THE PERSONAS MOST LIKELY AND LEAST LIKELY TO VISIT AUSTRALIA'S REGIONS

1ST (MOST LIKELY)

FAMILY ROAD TRIPPERS
(20% of domestic leisure visitors)

- 62% visited a regional area on their last trip
- repeat customers – 33% had been before
- 28% use word-of-mouth as a key information source

For this group, taking a holiday means spending quality time with the family – and regional Australia offers an affordable, easy to access option

1ST (LEAST LIKELY)

ASIAN VISITING FRIENDS AND RELATIVES (VFR) MARKET
(4% of international leisure visitors)

- 19% visited a regional area on their last trip
- gaining knowledge, natural attractions and iconic wildlife are important
- choose destinations with direct flights

Among those who did not visit regional Australia, more than seven-in-ten agreed that regional Australia would be a good place to visit if time permitted. However, they require more information on what is on offer

2ND

TRADITIONAL MARKET GEN Y/Z
(4% of international leisure visitors) on their first trip

- 59% visited a regional area on their last trip
- use the internet to decide where to travel and what to do when they get there

Regional Australia is part of their 'bucket list' and a chance to learn something new, but they are more price-sensitive than other travellers

2ND

FESTIVAL AND EVENT GOERS

- 34% visited a regional area on their last trip
- those who did visit had a preference for regional areas, and are strongly motivated by the opportunity to explore

Those preferring capital cities identified ease of travel and greater shopping and dining experiences as ways to influence them to travel to regional Australia

3RD

AFFLUENT 55+ AUSTRALIANS
(10% of domestic leisure visitors)

- 56% visited a regional destination on their last trip
- enjoy eating out at restaurants and shopping and stay longer at regional destinations (6.9 nights on average) than capital cities (5.8 nights)
- repeat customers – 44% had been before

For these older Australians, travel offers the chance to escape day-to-day life and gain knowledge

3RD

ASIAN GEN Y AND Z MARKET
(7% of international leisure visitors)

- 41% visited a regional area on their last trip
- Once there, they typically stay 9.6 nights – less than the 15 night average for international leisure visitors
- use social media for both inspiration and planning travel

Drawn to natural wonders and food and wine experiences, those who have not travelled to regional Australia could be induced to visit with a better range of shopping, dining and experiences

REGIONAL TRAVEL – THE DRIVERS, BARRIERS AND OPPORTUNITIES

Travel decisions can be contingent, complex, and sometimes even spur of the moment. People enjoy travelling for many different reasons, and also look for different attributes in a destination. However, a number of recurring themes came out of the research.

Respondents were asked to identify their main reason for visiting a regional destination if they had recently travelled outside a capital city or the Gold Coast, or their main barrier if they had not. The key results included:

DRIVERS

- For international respondents, visiting regional destinations is strongly driven by a desire to spend time with friends and relatives.
- For domestic respondents, visiting regional destinations is strongly driven by convenience and affordability, as well as the opportunity to spend quality time with friends and relatives.

BARRIERS

- Over one-in-five international respondents said that time constraints were one of the reasons they had not left a capital city when visiting Australia.
- A lack of knowledge about regional Australia was the second most prevalent response – the majority of these responses were by Chinese respondents.
- Time and money were the top two barriers to dispersal among domestic respondents. Not far behind was a simple preference for travelling to capital cities.

OPPORTUNITIES

- International respondents highlighted more time and ease of access as the major influences on them regionally dispersing in the future. Over half of those who mentioned time constraints were from China.
- Access to more information was also a popular selection across source markets; however, those from China, New Zealand, and Japan most strongly identified with this as a potential influence on their dispersal behaviour.
- With more time, money and greater convenience, domestic respondents would consider travelling to regional Australia.
- New – or a refresh of existing – offerings and experiences are key in attracting visitors to regional areas.
- Consultations with investors revealed some insights into supporting investment in regional tourism assets:
  - Assets with a broad-based demand profile are preferred, as they alleviate risk.
  - Greenfield projects are generally less attractive to investors and considered high risk, especially in regional areas.
  - A lack of knowledge of regional Australia is a barrier, particularly for foreign investors and those seeking foreign capital.
  - Businesses with an established regional foothold are more likely to consider new opportunities in regional locations.
  - There is optimism in the continuing rise of regional tourism, as it is well placed to develop products that can offer greater personalisation, authenticity and connection with nature.
  - When designing new policies and incentive schemes, government needs to consider the dynamics of supply and demand to promote sustainable development.

Image courtesy of Tourism Australia

METHODOLOGY

With each regional destination having a distinct tourism offering, understanding regional dispersal requires tailored strategic insights and research relating to traveller behaviour, patterns, trends and sentiment in order to inform policy development, marketing campaigns, product development and identify the best areas for future investment.

The objectives of the regional dispersal research included gathering the evidence that will inform strategies to attract greater visitation to regional Australia, as well as gaining a better understanding of the:

- leisure travel patterns of those who visit regional areas
- propensity of travellers to visit regional Australia
- motivators and barriers to travel in regional Australia
- role that planning and information play in influencing travel to regional areas.

Image courtesy of Tourism Australia

This analysis was conducted through three linked research streams:

Data and econometric analysis

The detailed data and econometric analysis utilised unit record data in the International Visitor Survey (IVS) and the National Visitor Survey (NVS) to update previous research on the propensity to visit regional Australia and to develop a baseline understanding of the drivers of visitation to regional areas.

Primary research

The primary research involved in-depth surveys of more than 5,500 domestic and international visitors to understand why people do, or do not, travel to regional Australia, and their broader motivations for travel.

Persona analysis

The primary research supported the development of personas to assist with segmenting the leisure visitor market in Australia into meaningful cohorts based on demographic and psychographic characteristics. The decision-making journey of each persona was then used to better understand why some visitors chose to travel to regional destinations and others did not (real and perceived barriers, desires and motivations).

WHO IS MOST LIKELY TO VISIT REGIONAL AUSTRALIA AND WHO IS LEAST LIKELY?

To better understand the reasons why people do and do not travel to regional destinations, a series of eleven personas were developed. They were based on the relative size and importance of different segments, and had characteristics identified as having a strong link to the propensity to visit regional destinations (through econometric analysis of IVS and NVS data) and the importance of different markets to Australian tourism (including discussions with industry). The motivations and drivers of these personas, and their travel decision-making patterns, were then explored through a survey of domestic and international visitors.

These eleven personas were identified as being impactful for regional Australia – both in terms of their relative size and contribution today, and expected importance in the future.

TABLE 3: ELEVEN PERSONAS OF VISITORS IN AUSTRALIA

NAME	SAMPLE SIZE	CRITERIA
Affluent 55+ Australians	320	■ Australian residents ■ 55+ years old ■ Household income greater than $85,000 per annum ■ Demographic-based
Affluent Gen Y and Z Australians	212	■ Australian residents ■ 15–34 years old ■ Household income greater than $85,000 per annum ■ *Demographic-based*
Family road trippers	454	■ Australian residents ■ On their most recent trip – Travelled as parents with their children – Main mode of transport was a private vehicle/rental car/caravan ■ *Demographic-based*
Rechargers	372	■ Australian residents ■ Determined by responses to questions around motivations for travel based on 'why' and personal views on travel ■ *Psychographic-based*
Foodies	279	■ Australian residents ■ Determined by responses to questions around motivations for travel based on 'what' and personal views on travel ■ *Psychographic-based*
Adventurers	117	■ Australian residents ■ Determined by responses to questions around motivations for travel based on 'why' and personal views on travel ■ *Psychographic-based*
Festival and event goers	201	■ Australian residents ■ Determined by responses to questions around motivations for travel based on 'what' and personal views on travel ■ *Psychographic-based*
Asian market Gen Y and Z	422	■ Chinese and Japanese residents ■ 15–34 years old ■ *Demographic-based*
Asian market VFR	54	■ Chinese and Japanese residents ■ Main purpose of visit to Australia was to visit friends and relatives ■ *Demographic-based*
Traditional market Gen Y and Z	212	■ US, UK and NZ residents ■ 15–34 years old ■ First-time visitors to Australia ■ *Demographic-based*
Traditional market 55+	209	■ US, UK and NZ residents ■ 55+ years old ■ Repeat visitors to Australia ■ *Demographic-based*

2018 SURVEY ON REGIONAL VISITATION

These findings are based on the 2018 Survey on Regional Visitation. The survey focused exclusively on the leisure market:

- 2,015 domestic respondents (67% of domestic sample) who stated that they had visited regional Australia at least once in the past two years.
- 999 international respondents (40% of international sample) that visited regional Australia at least once over the past five years, for an overnight trip (37%), for a day trip only (31%) or both (32%).

Those who had visited regional Australia were asked to select why they did so. Those who had not visited regional Australia were asked why they did not and what would have influenced them to do so.

ESTIMATING INTERNATIONAL DAY TRIPS

International day trips are not currently recorded in the International Visitor Survey (IVS). The numbers used here are estimates based on reconciling the stated 'places visited' (e.g. Great Ocean Road) and tourism regions in which respondents have stayed overnight in the IVS. Discrepancies between the total number of visitors and overnight visitors is assumed to be due to day trips.

This approach provides a reasonable indication of magnitude for smaller tourism regions (such as in Victoria and NSW), but is less relevant for large tourism regions (such as in Queensland and WA). Places visited is not a compulsory question, and is not an exhaustive list of destinations so these numbers are likely to be an underestimate.

For more information, go to **www.tra.gov.au**.

Image courtesy of Tourism Australia