



Opening insights: Queensland's visitor economy in motion

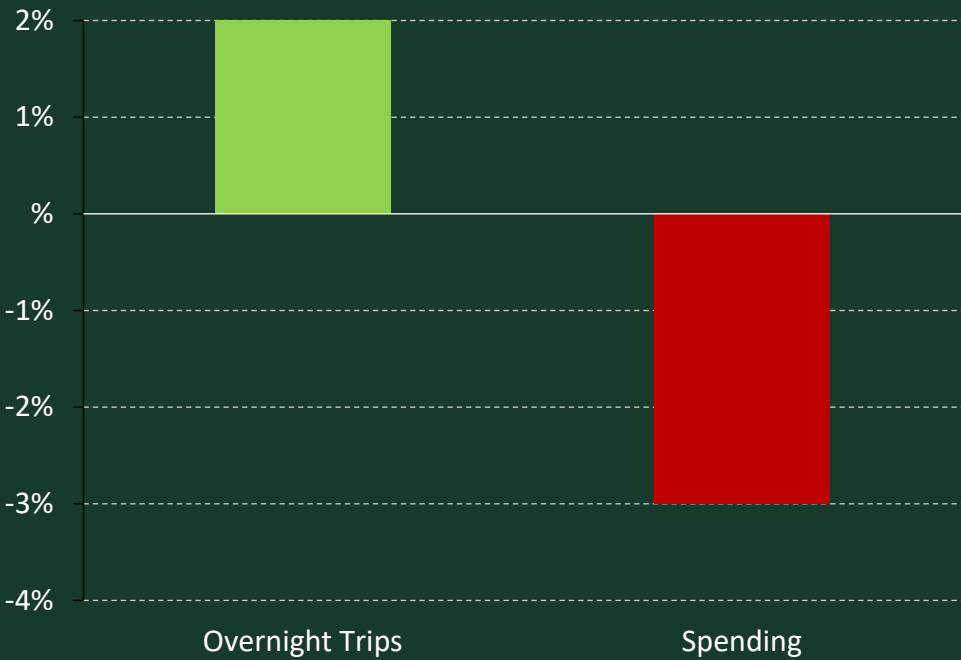
Robbie Dalton, Localis

RAPID TRAVEL TRENDS

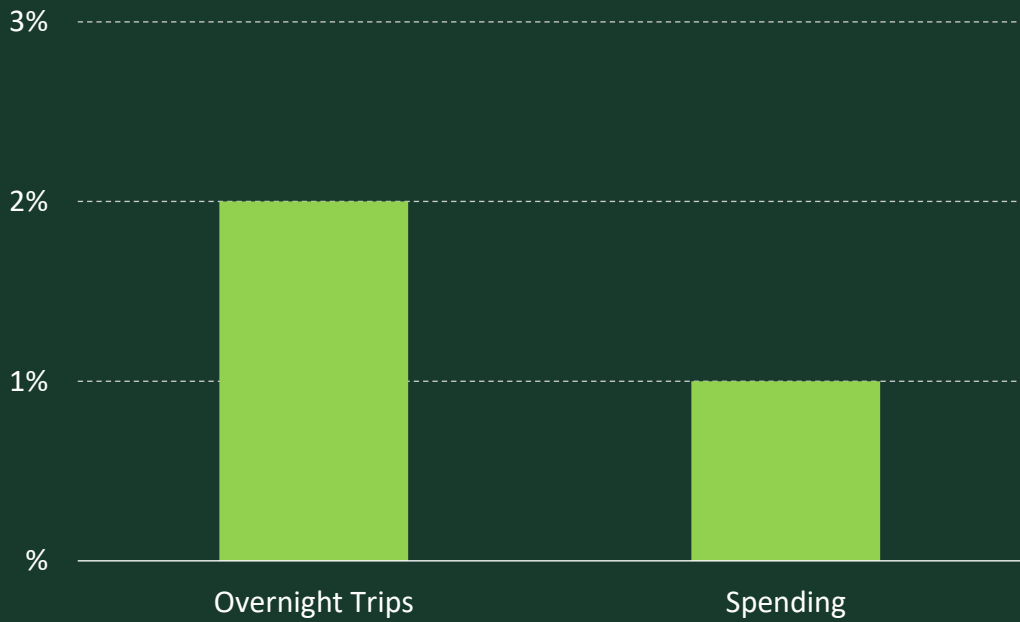
Domestic Travel Spend is Declining Despite Rising Trip Numbers

TRA Data shows that while overnight trips increased by 2% to 27.6 million in June quarter 2025, spending fell 3% to \$21.9 billion. Australians are taking trips but cutting back on expenditure, with Queensland experiencing an increase of 2% in visitors and 1% in spending.

AUSTRALIA - JUNE QUARTER 2025



QUEENSLAND JUNE QUARTER 2025



Sources: [Tourism Research Australia, Domestic Tourism Statistics Results](#)

Cost of Living Crisis is Forcing Australians to Cut Travel Spending



of Australians traveling in 2024 needed to reduce travel costs

41%

Booking Cheaper Accommodation

41%

Taking Fewer trips overall

36%

Taking Shorter trips

34%

Choosing cheaper destinations



Young Australians Hit Hardest

25-29 year olds are spending less in both essential (-2%) and discretionary (-3.3%) spending

Age 25 - 29 Spending Changes Mar 2024 vs 2023



Source: [Commonwealth Bank iQ Cost of Living Insights Report](#)

47% of Australians consider travel more important than discretionary spending.

1 in 5 claim its a top priority



Australians Choose Value Destinations Over Over Perceived Expensive Domestic Travel Travel

Indonesia surpassed New Zealand as the top destination, driven by value-seeking behaviour and favourable exchange rates. Asian destinations surge while long-haul travel declines.

| # | Destination | Trips (2024-2025) | 10 Year Difference |
|---|---------------|-------------------|--------------------|
| 1 | Indonesia | 1,741,370 | 55% Increase |
| 2 | New Zealand | 1,409,320 | 15% Increase |
| 3 | Japan | 910,640 | 234% Increase |
| 4 | United States | 746,220 | -25% Decline |
| 5 | China | 652,950 | 61% Increase |

Sources: [Australian Bureau of Statistics](#) | [SBS News Analysis](#)

International Visitors Are Flocking To Australia in Record Numbers

| | Visitor arrivals | Visitor Spend | 7 Year High |
|------------|--|--|--|
| Australia | <div>arrivals</div> <div>8.4M</div> <div>+5.5% YoY</div> <div>Financial Year 2024-2025</div> | <div>\$37.5 B</div> <div>+18% YoY</div> <div>Year Ending June 2025</div> | <div>Above 2019</div> <div>+22% Spend</div> <div>Year Ending June 2025</div> |
| Queensland | <div>2.1M</div> <div>+2.7% YoY</div> <div>Financial Year 2024-2025</div> | <div>\$6.9B</div> <div>+10.6% YoY</div> <div>Year Ending June 2025</div> | <div>Above 2019</div> <div>+15% Spend</div> <div>Year Ending June 2025</div> |

Sources: [Australian Bureau of Statistics, Overseas Arrivals and Departures 2024-25](#) | [Tourism Research Australia, International Tourism Results](#) | [Tourism and Events Queensland](#)

International Visitation Growth Was Uneven Across QLD Regions

| Destination | International Visitor % Change |
|--------------------|--------------------------------|
| Tropical North QLD | + 14.2% |
| Sunshine Coast | + 7.7% |
| Brisbane | + 2.8% |
| Gold Coast | - 1.7% |
| Whitsundays | - 5.5% |
| Townsville | - 10% |
| Queensland Country | - 15.9% |

Sources: [Tourism and Events Queensland](#)



Major Events Are Bringing International Visitors

Major events are a major cause of cause of dispersal

The British Lions Tour has generated significant increases in UK visitor numbers across Queensland regions in July compared to July.

Seven out of nine regions are experiencing their biggest July on record, demonstrating the widespread impact of this major sporting event beyond just Brisbane.



UK SPEND IN QLD JULY 25

| Region | % Change YOY |
|--------------------|--------------|
| Gold Coast | + 138.3% |
| Brisbane | + 99.3% |
| TNQ | + 94.2% |
| Noosa | + 74.5% |
| Whitsundays | + 68.4% |
| Townsville | + 27.4% |
| Mackay | + 23.1% |
| Outback Queensland | + 86.8% |
| Bundaberg | + 41.2% |

Sources: Localis Spend Data

All QLD Regions benefited from the British & Irish Lions Tour

Restaurants and Bars - UK

| Region | % Change |
|--------------------|----------|
| Brisbane | + 259.9% |
| Bundaberg | + 128.5% |
| Gold Coast | + 165.3% |
| Mackay | + 75.6% |
| Noosa | + 175.5% |
| Outback Queensland | + 139.3% |
| Townsville | + 38.1% |
| TNQ | + 144.1% |
| Whitsundays | + 234.7% |

Retail & Entertainment - UK

| Region | % Change |
|--------------------|----------|
| Brisbane | + 71.6% |
| Bundaberg | + 140.7% |
| Gold Coast | + 54.6% |
| Mackay | + 21.1% |
| Noosa | + 84.2% |
| Outback Queensland | + 21.7% |
| Townsville | + 44.3% |
| TNQ | + 52% |
| Whitsundays | + 178.6% |



Tourism is in our Nature

Tim Baker, City of Gold Coast



CITY OF
GOLDCOAST.™

NATURE-BASED TOURISM OPPORTUNITIES

 Tallebudgera, Gold Coast



Gold Coast is the largest economy of any non-capital city in Australia.

\$45.4b

Gross regional product

1m+

Residents by 2040



\$4.5B

Construction



\$4.3B

Healthcare and
social assistance



\$2.9B

Professional, scientific
and technical services



\$2.8B

Manufacturing



\$2.7B

Retail trade

A scenic photograph of a lush, green forest surrounding a clear, turquoise waterhole. The water is calm, reflecting the surrounding trees and rocks. In the background, a small waterfall cascades over rocks. Several people are visible: two are sitting on a large rock in the middle ground, and others are further back near the waterfall. The overall atmosphere is peaceful and natural.

Our Gold Coast tourism industry is strong and flourishing

4.9m

total overnight
visitors

\$6.9b

total overnight
visitor spend

37.8%

increase in overnight
visitor spend, a record high
since 2019.

Source: Tourism & Events Queensland, 'Gold Coast Regional Snapshot Year Ending Dec 2024'

WHAT IS THE
PROBLEM?

TOURISM IS IN OUR NATURE

THE OPPORTUNITY

1 in 5

global travellers seek
nature-based tourism
experiences

Source: Tourism Australia 2025

The Gold Coast is one of Australia's most ecologically diverse cities



52km
open coastline
and famous
surfing beaches

171 km
of navigable
waterways



Over
758km
of beautiful bush trails



Council owned
conservation estate

13,932ha



Over
3032
native animal
species



1 of 36
biodiversity
hotspots in the world



4524.8ha
World heritage listed
GONDWANA rainforest



50.55%
native vegetation
cover

Nature-based Tourism Program

1. Grant Program
2. City-led Projects



Grant Opportunities

Funding is available under two categories

1. Grants up to \$100k (AUD) for quick activation financial or in-kind support for new and established tourism businesses.
2. Opportunity Response Program for new, innovative, nature-based tourism products or experiences that provide tangible benefits to the Gold Coast and require funding over \$100k.



Total grants: \$2.56 million

Small grants:

- 74 applications, 13 approved
- Projects: whale watching learning hubs, wellness immersions, mountain biking, edible gardens, photography safaris
- Cost to City: \$556,000 – leveraging 45% co-contribution
- Impact: \$4.3 million in economic return, 32 jobs created

Large grants:

- 34 applications, 10 approved
- Projects: Ziplines/adventure hubs, eco-accommodation and farm stays in Numinbah Valley, marine wildlife hospitals, cultural learning centres, regenerative island precincts and eco River tours.
- Cost to City: \$2M - leveraging 89% co-contribution
- Impact: \$58 million in economic return, 250 jobs created



behind the gold.

Opportunities

Rainforest and Wilderness



Numinbah Valley

Improvements to the Gold Coast Hinterland Great Walk and Woonoongoora Eco Camp



Springbrook 'Eaglemont Estate'

Masterplan development



Austinville

Eco accommodation, enhanced trail networks and day use areas

Beaches and Waterways



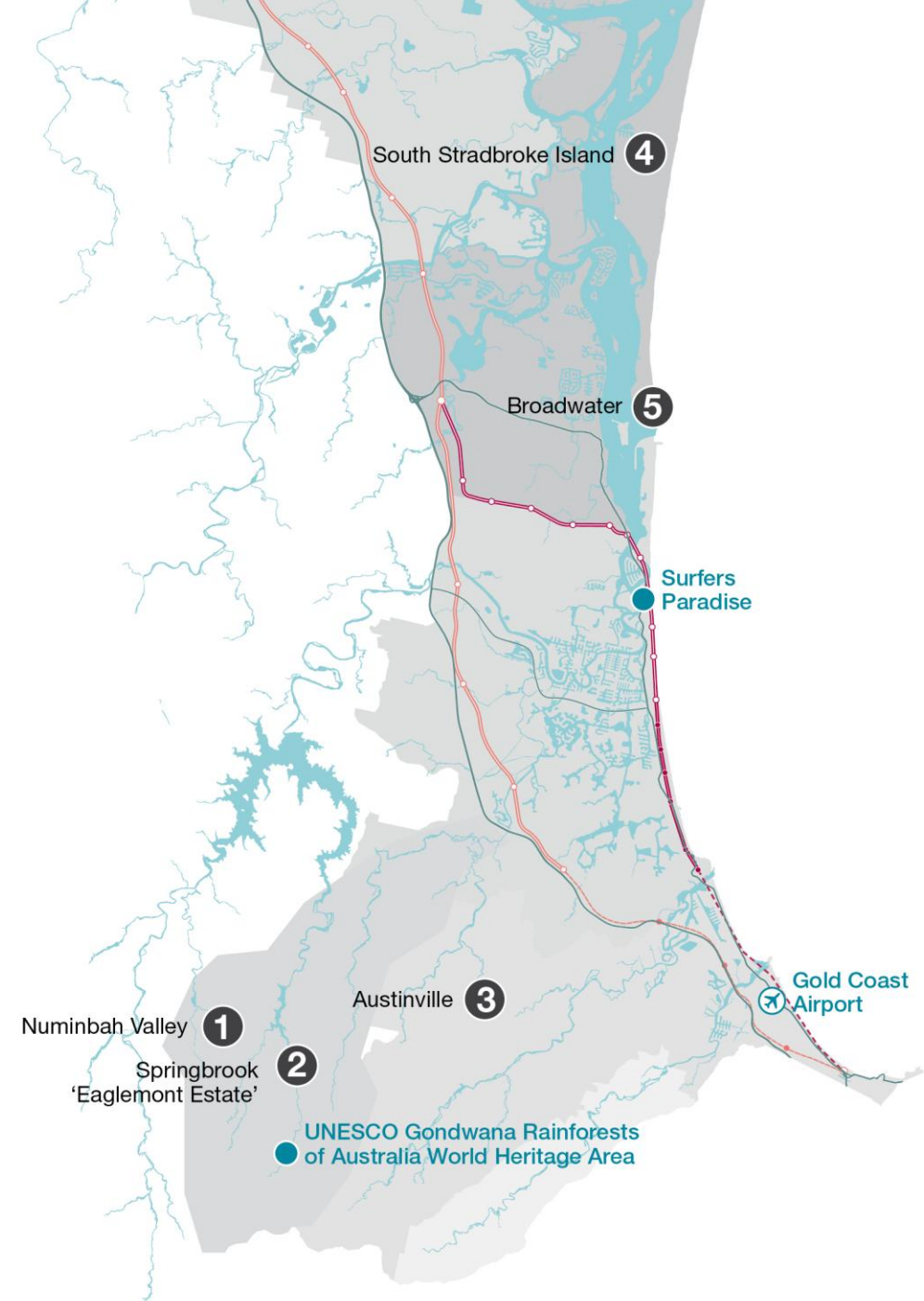
South Stradbroke Island

Tipplers precinct enhancements



Broadwater

Accommodation and experience development



Government Partners

1.

The independent
assessment panel

2.

The dedicated
NBT team

3.

Strong support from
the Council

4.

Alignment with the
State Government

A group of five people (three men and two women) are practicing yoga on a grassy hill. They are all in a similar pose, with one leg bent and the other extended, arms raised. They are on pink yoga mats. In the background, there is a dense forest of green trees and a city skyline visible in the distance under a cloudy sky.

Tourism is in our nature

CITY OF
GOLDCOAST.

Subscribe to win

Subscribe to Nature-Based Tourism updates and go into the draw instantly to win **1 of 5 Gold Coast Nature Escapes**

- Boomerang Farm adventure package
- Historic Rivermill experience
- The Tour Collective whale watching experience
- Southern Cross Tours Springbrook tour
- TreeTop Challenge adventure vouchers

Tourism is in our nature





45 Projects

*Matt Bron, Department of the
Environment, Tourism, Science and
Innovation*

45 Projects: One bold vision

Gearing up for 2045 through the 45 by 45 criteria that will shape
Queensland's ecotourism future

DESTINATION 2045

**DELIVERING
QUEENSLAND'S
TOURISM FUTURE**

DELIVERING
FOR QUEENSLAND



Queensland
Government

Wallaman Falls, Townsville



45 by 45: Getting Ecotourism Moving in Queensland

Queensland's ecotourism policy

Queensland Ecotourism is open for business. We are committed to protecting the environment while facilitating new and improved ecotourism products across the state.

Queensland has over 1,000 parks and forests of outstanding natural beauty. That is why we are committed to responsibly showcasing our natural treasures for all to enjoy by delivering 45 more ecotourism projects across our state by 2045.

DELIVERING
FOR QUEENSLAND



Queensland
Government

Delivering Queensland's tourism future and position as a global tourism leader

DELIVERING QUEENSLAND'S TOURISM FUTURE

DELIVERING
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DELIVERING
FOR QUEENSLAND



Queensland
Government

- Unlock new and improved ecotourism tourism opportunities balancing nature, culture, scale, design and impact
- Work with industry making it easier to develop ecotourism experiences on and off protected areas
- Showcase the spirit of our state to the world

DELIVERING QUEENSLAND'S TOURISM FUTURE

45 by 45: Getting Ecotourism Moving in Queensland

Queensland's ecotourism policy

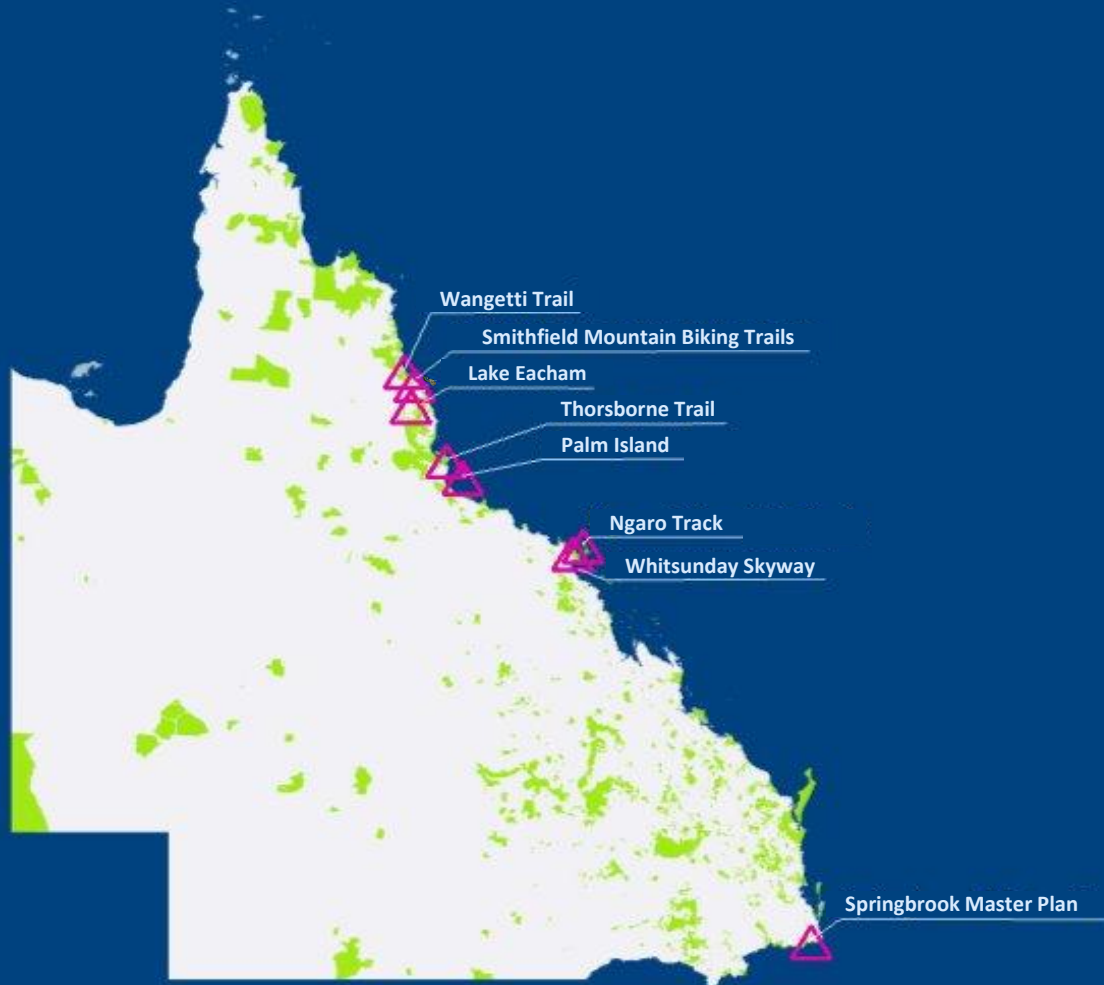
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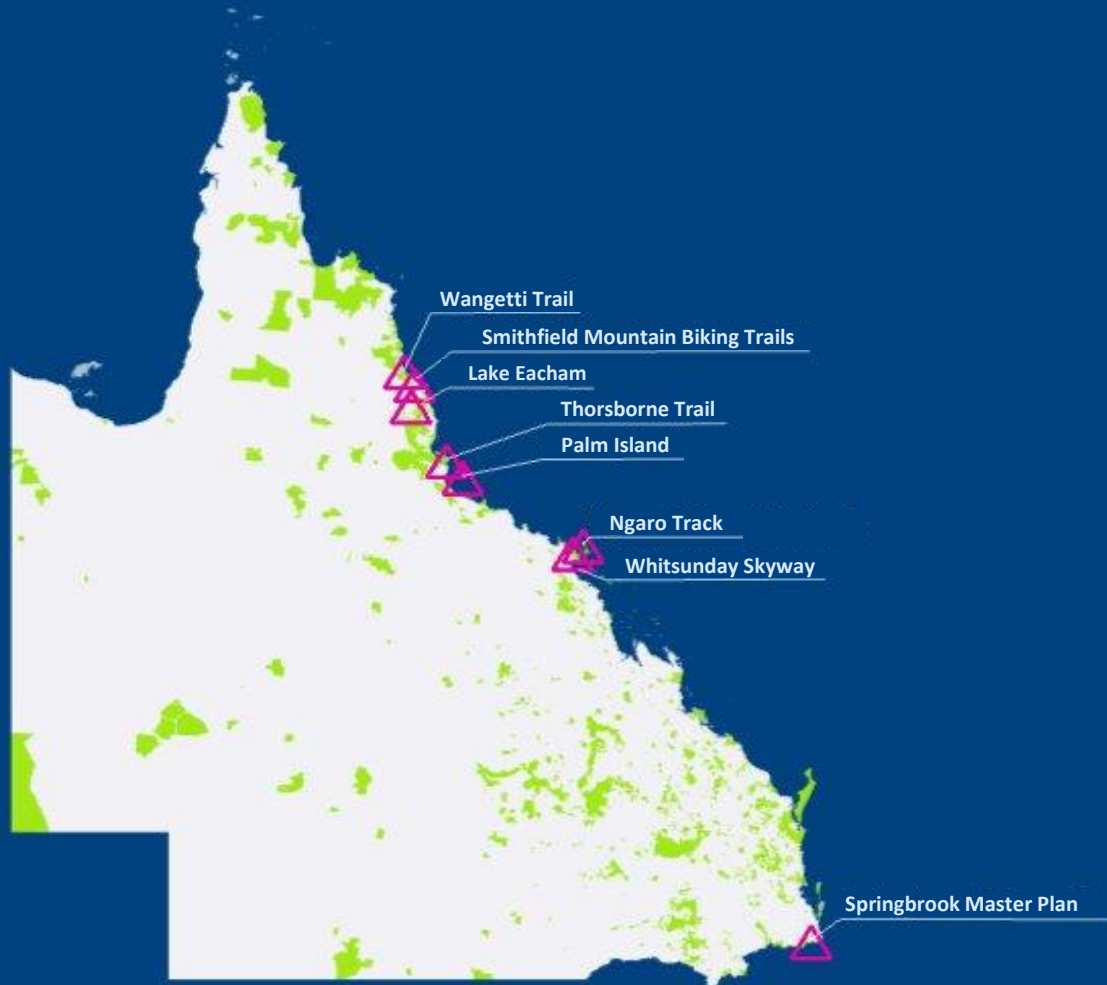
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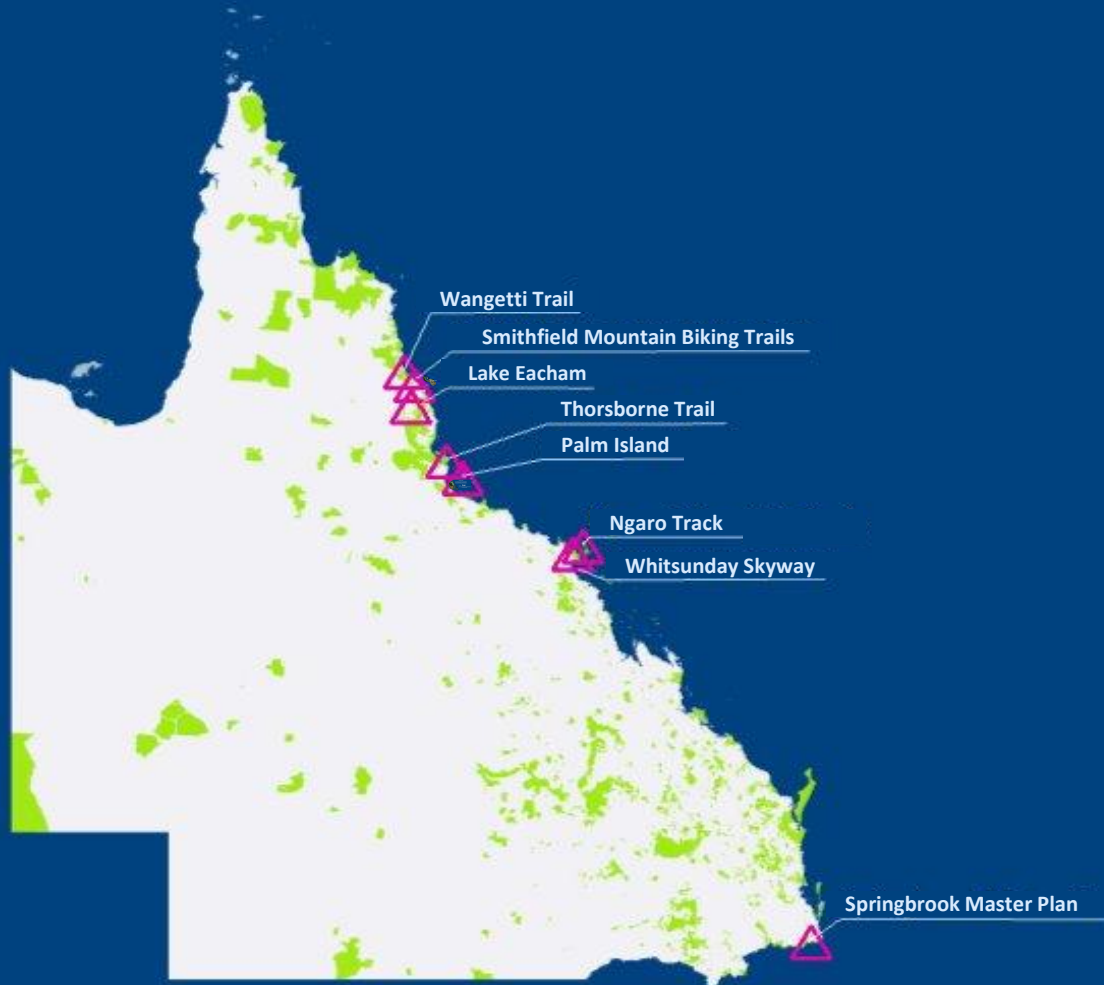
45 Projects: One Bold Vision

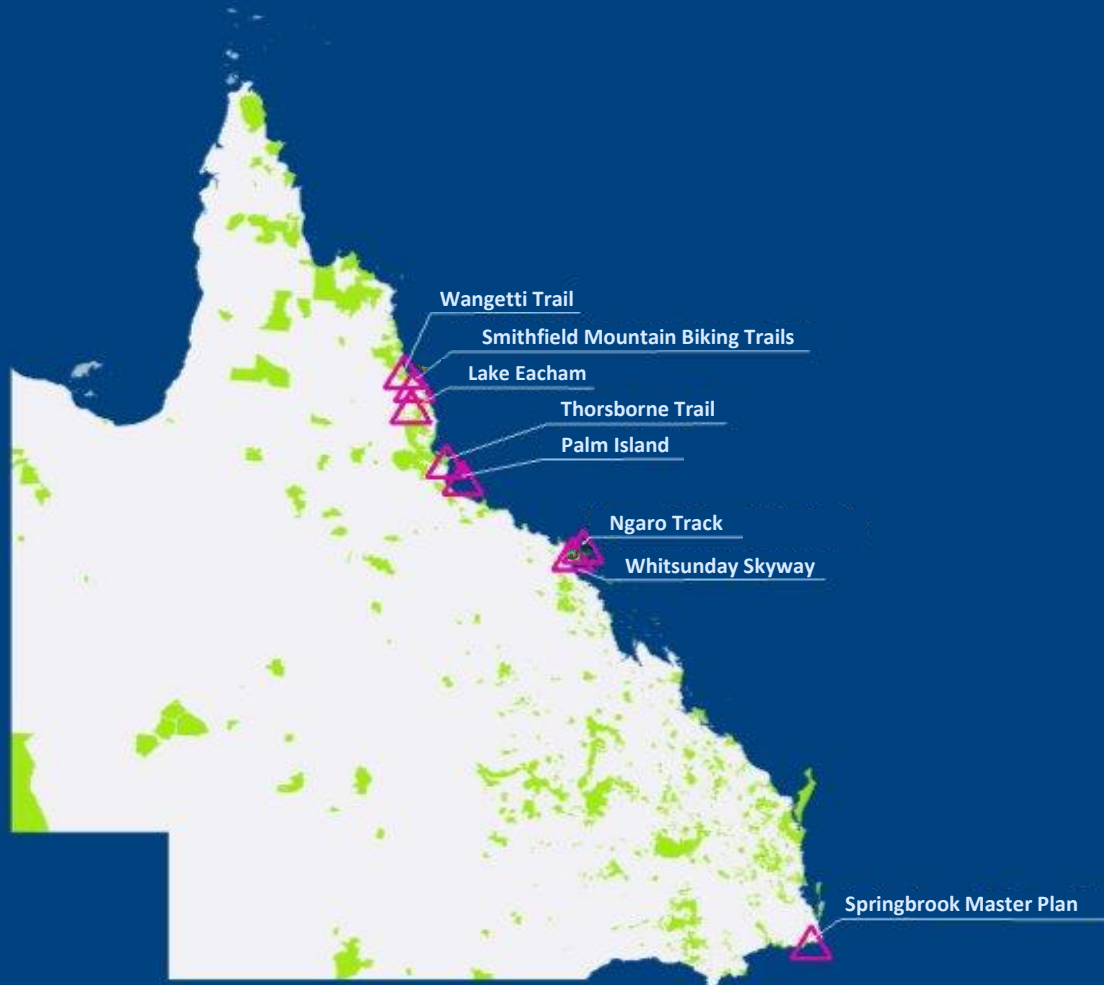
- High quality, low impact experiences that protect Queensland's natural beauty without harming ecosystems
- Innovative design, Environmental stewardship, Authentic local storytelling
- Small scale, light-touch, low-footprint ecotourism
- Elevate regional tourism









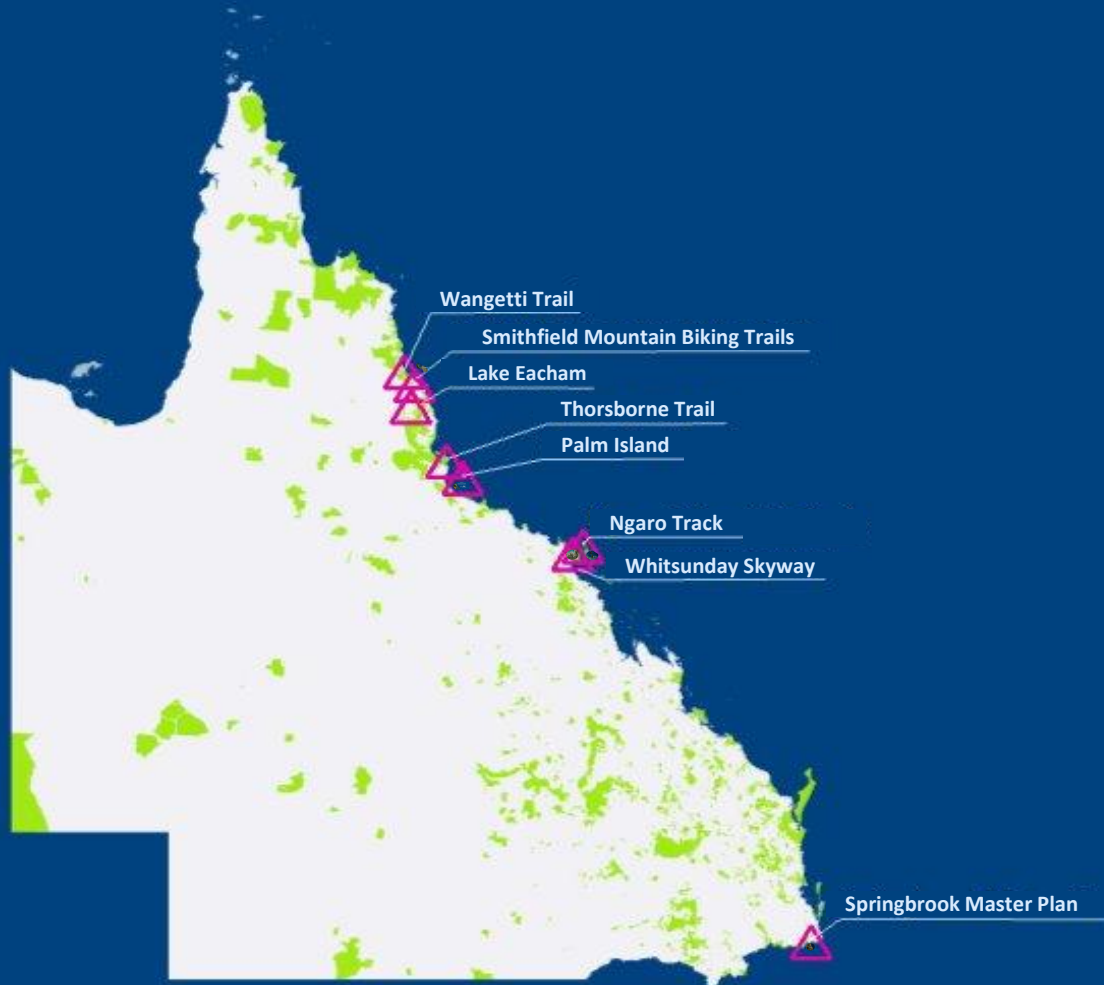


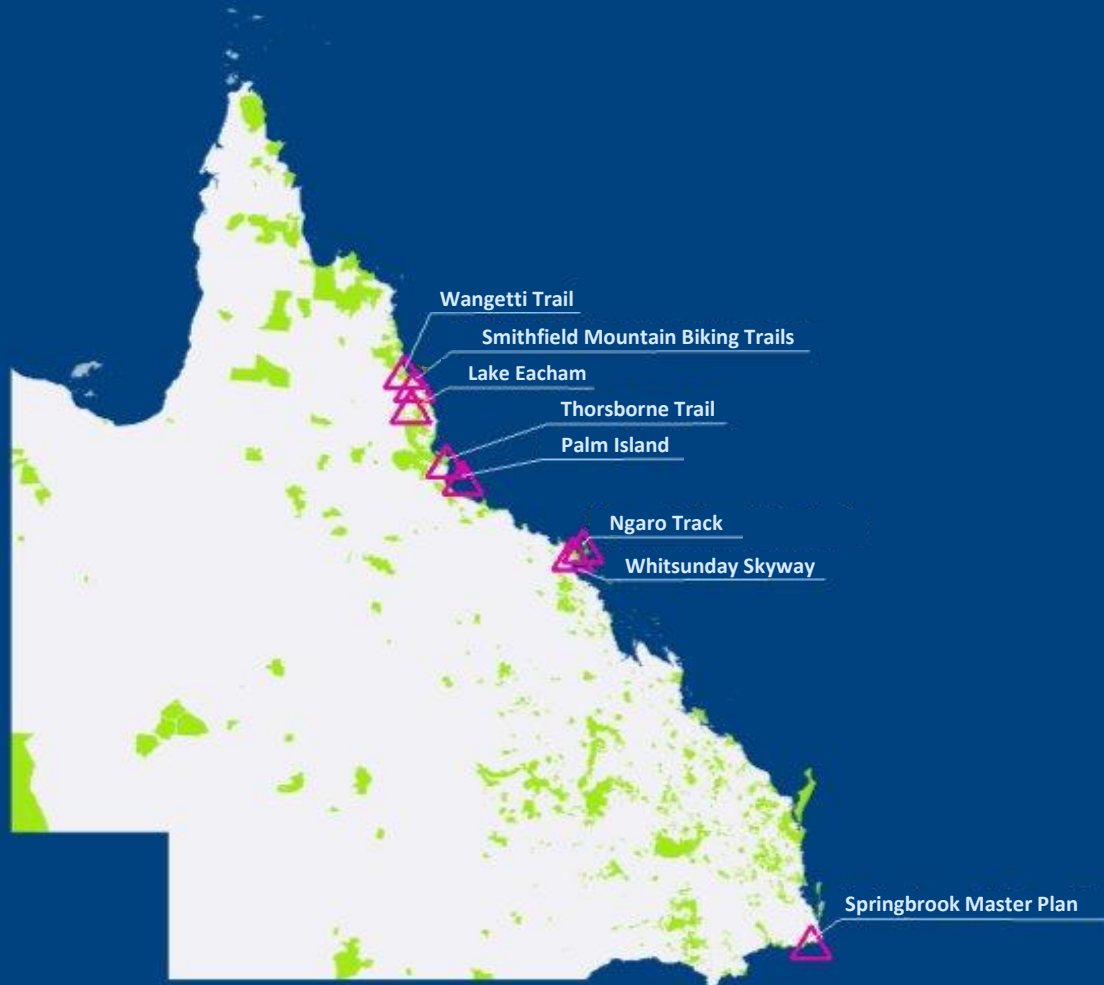
Thorsborne Trail

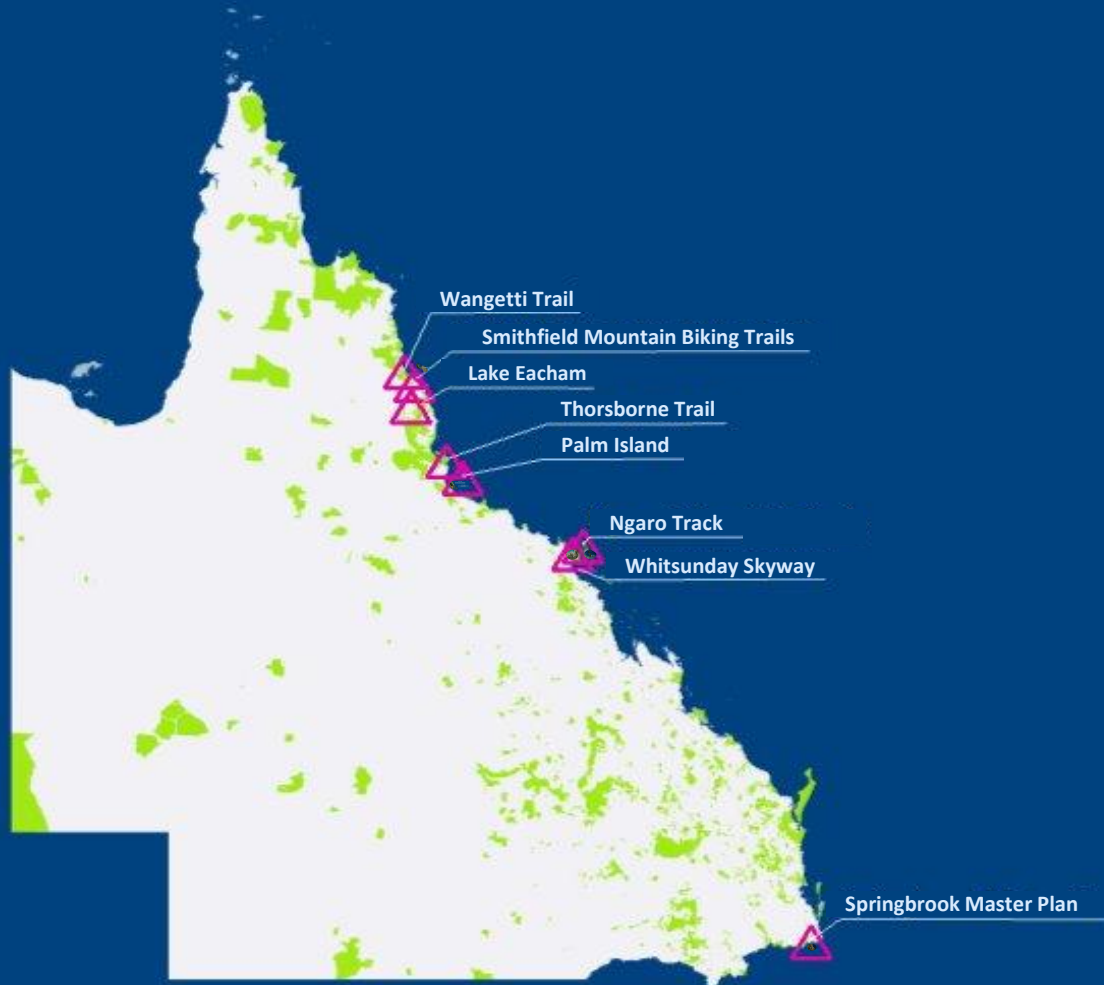
Trail upgrades to include new and upgraded toilets at campgrounds, new seating and pack racks, improved signage, minor trail works.

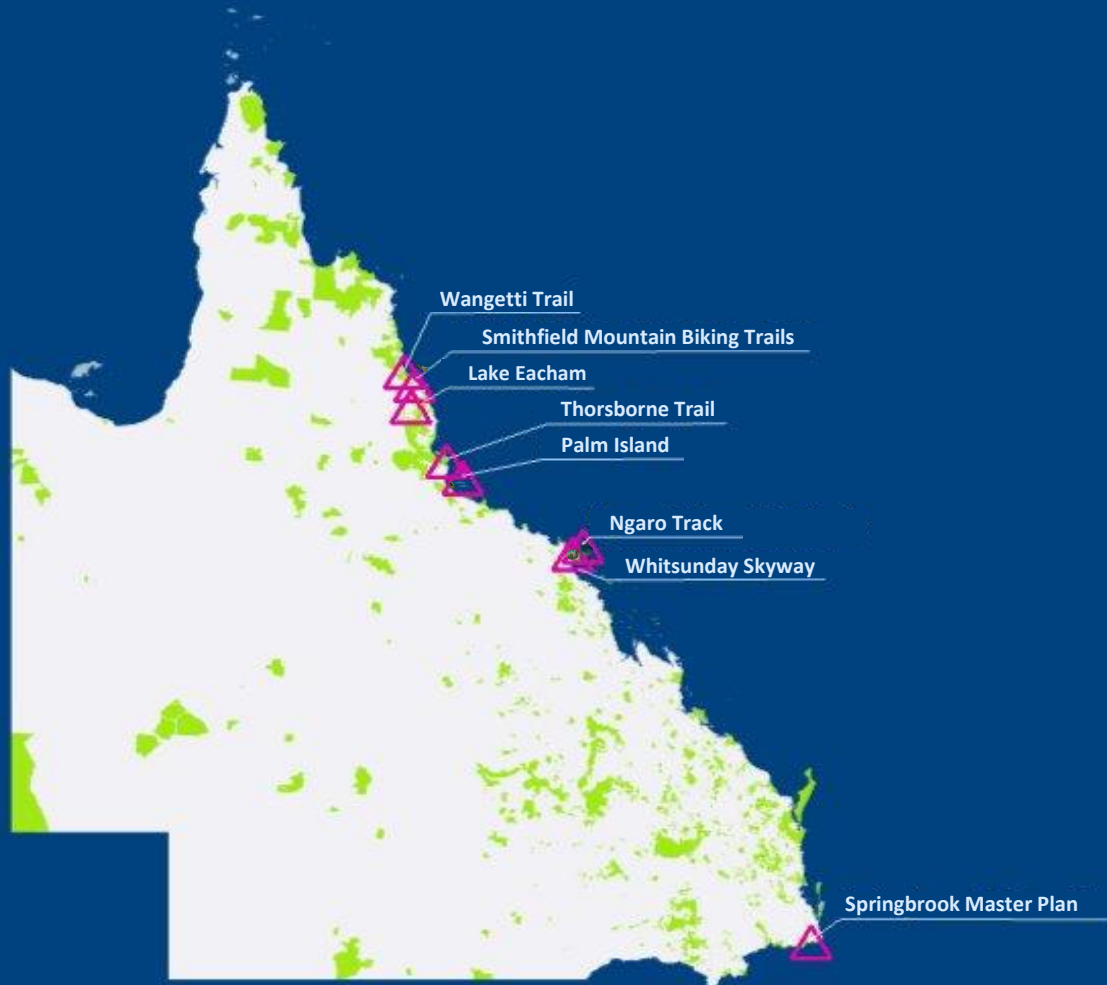
Palm Island

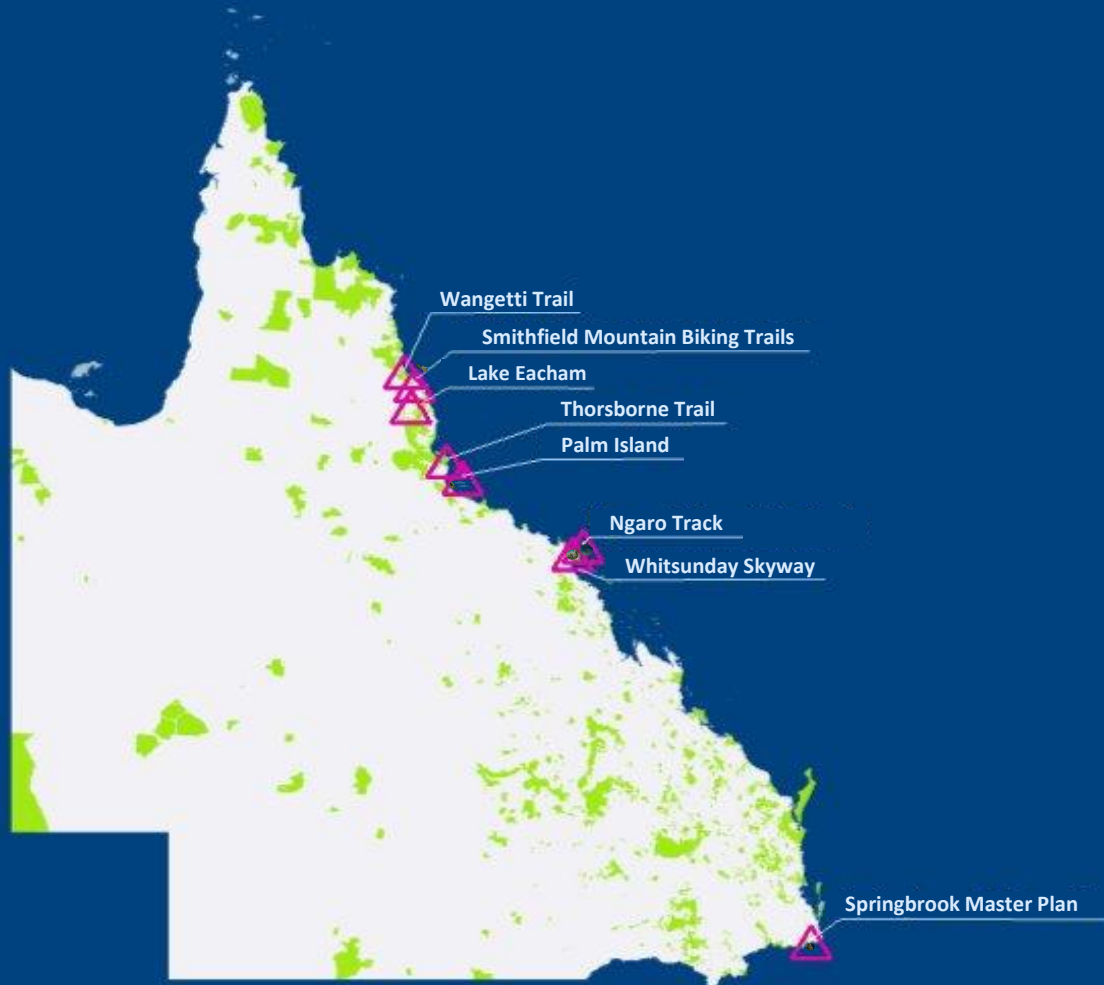
Construction of 7km of walking trails to attract visitors and showcase the area's natural beauty and cultural heritage. "











45 by 45 criteria to shape Queensland's ecotourism future

DESTINATION 2045

**Shaping iconic places and
a world-class ecotourism
future**

**Shovel-ready, future
focused**

**Powering sustainable
ecotourism through
conservation and innovation**

**Alignment with Destination
2045 and regional priorities,
reflect emerging trends and
address a market gap**

**Comprehensive feasibility
study completed and
ready
for approval**

**Supports conservation and
research initiatives and
outcomes**

INNOVATION IN ECOTOURISM

SHARE YOUR IDEAS

What are some ideas of innovation that you have seen or
would like to see in Queensland?



BOLD VISION, WORLD-CLASS

DESTINATION 2045



Bisate Lodge, Rwanda

6 forest villas, accommodating maximum of 12 guests

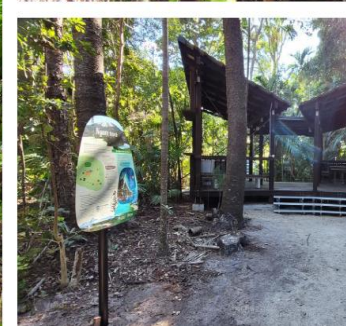
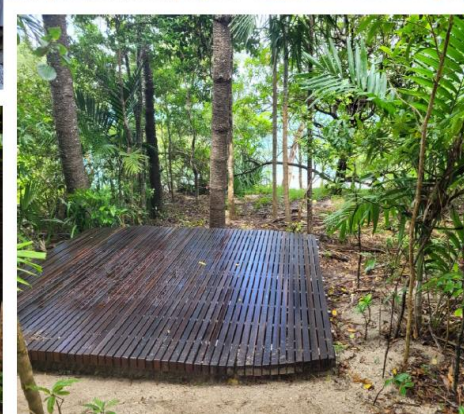
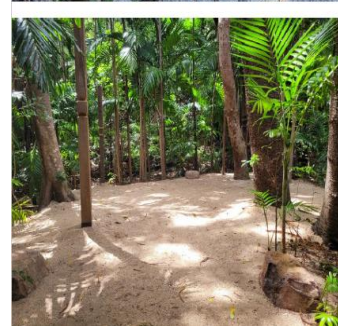


Juvet landscape hotel, Norway



The first 45 by 45

DESTINATION 2045



Ngaro track, Whitsundays

DELIVERING
FOR QUEENSLAND



Queensland
Government

Do you have
a world-class
ecotourism
project?

Any other enquiries: EcotourismODG@detsi.qld.gov.au

Fill in this form to discuss your
ecotourism project further

