

Southern Great Barrier Reef Regional Snapshot

Year Ending December 2020



Lady Elliot Island

	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	1,788,000	593,000	514,000	497,000	\$970.5m
Annual % change ¹	▼ -22.8%	▼ -19.3%	▼ -25.8%	▼ -33.7%	▼ -19.0%
3-yr trend % change ²	▼ -2.3%	▼ -3.3%	▼ -4.0%	● 0.3%	▼ -0.6%
International Overnight	23,000	18,000	n/p	n/p	\$8.2m
Annual % change	▼ -83.9%	▼ -83.9%	n/p	n/p	▼ -91.7%
3-yr trend % change	▼ -29.0%	▼ -28.9%	n/p	n/p	▼ -28.2%
TOTAL	1,810,000	611,000	n/p	n/p	\$978.7m
Annual % change	▼ -26.3%	▼ -27.7%	n/p	n/p	▼ -24.5%
3-yr trend % change	▼ -4.0%	▼ -6.8%	n/p	n/p	▼ -2.9%



Domestic Visitors

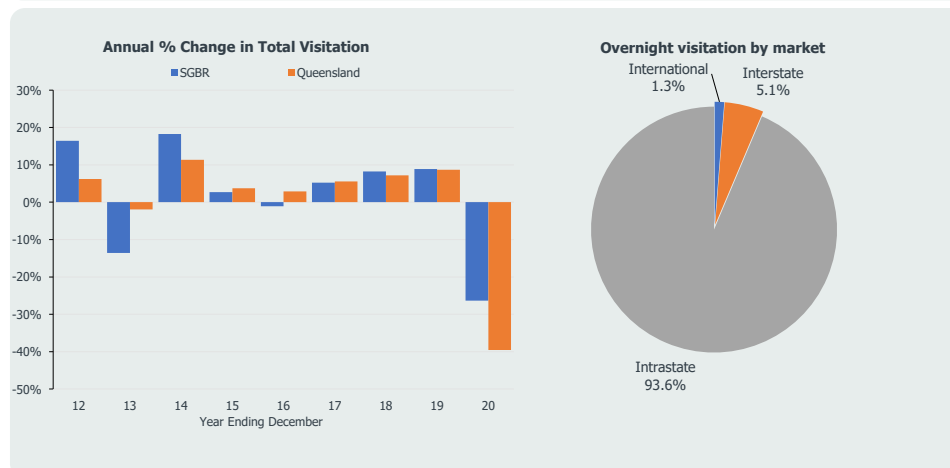
The year ending December 2020 includes all of the major impacts of COVID-19 restrictions on domestic travel to date. Queensland's borders closed on 3 April and all non-essential travel was banned soon after. Intrastate overnight travel was permitted within Queensland from 1 June, while interstate borders were reopened to all states except Victoria on 10 July but were reclosed to New South Wales and ACT a month after. Borders reopened to ACT as of 25 September, all of regional NSW by 3 November and Victoria and Greater Sydney on 1 December. Restrictions were put in place on Greater Sydney again on 20 December.

- Visitation in the December quarter 2020 was 3.5 per cent lower than in the December quarter 2019 as a result of border closures; however, nights were up by 4.7 per cent year on year. Encouragingly intrastate visitation in the December quarter 2020 increased by 7.0 per cent compared to 2019.
- Total overnight visitor expenditure decreased by 19.0 per cent to \$970.5 million in the Southern Great Barrier Reef (SGBR) region in the year ending December 2020 due to total visitation decreasing by 22.8 per cent to 1.8m.
- The Average Length of Stay (ALoS) was unchanged at 3.9 nights, so that total nights decreased by 22.2 per cent to 7.0m. Spend per night grew by 4.1 per cent over the year to \$138 per night.
- In the year ending December 2020, holiday visitation decreased by 19.3 per cent to 593,000, visitation by friends and relatives fell by 25.8 per cent to 514,000 and business visitation was down 33.7 per cent to 497,000.
- More than nine in 10 (95 per cent) domestic visitors to the region were from the intrastate market. Intrastate visitation decreased by 16.2 per cent to 1.7m visitors. The largest intrastate markets were Brisbane (down 16.9 per cent to 532,000) and intraregional travellers (down 20.0 per cent to 527,000).

International Visitors

NOTE: International Visitor Survey (IVS) interviews have been paused due to border closures in late March 2020. As a result, from June 2020 the IVS has been produced using more extensive immigration and incoming passenger card information and spend has been imputed to previous IVS interviews.

- In the year ending December 2020, international visitor expenditure in SGBR decreased by 91.7 per cent to \$8.2m reflecting an 83.9 per cent decrease in visitation to 23,000 and a 48.3 per cent decrease in average spend per visitor to \$361.
- The ALoS decreased by 3.6 nights to 11.2 nights so that total nights decreased by 87.8 per cent to 254,000 nights.
- In the year ending December 2020, holiday visitation decreased by 83.9 per cent to 18,000. Over this period holiday visitation accounted for 78 per cent of international visitors to the region.



December quarter 2020

	SGBR	Queensland
Domestic		
Visitors	533,000	5,112,000
Change vs December 2019	-3.5%	-24.3%
Nights	2,127,000	19,855,000
Change vs December 2019	4.7%	-24.5%

To stay up to date with the latest research updates, sign up to TEQ's industry newsletter, Eye on Q.

Year Ending December 2020

Domestic visitors to SGBR

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	593,000	-19.3%	2,047,000	-30.3%	3.5	-0.5
VFR	514,000	-25.8%	2,207,000	-20.8%	4.3	0.3
Business	497,000	-33.7%	2,072,000	-30.5%	4.2	0.2
Domestic³	1,788,000	-22.8%	7,044,000	-22.2%	3.9	0.0
Intrastate						
Holiday	567,000	-5.1%	1,941,000	-4.7%	3.4	0.0
VFR	464,000	-23.7%	2,026,000	4.1%	4.4	1.2
Business	488,000	-29.3%	2,016,000	-23.5%	4.1	0.3
Intrastate	1,695,000	-16.2%	6,679,000	-3.2%	3.9	0.5
Interstate						
Holiday	n/p	n/p	n/p	n/p	n/p	n/p
VFR	n/p	n/p	n/p	n/p	n/p	n/p
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	n/p	n/p	n/p	n/p	n/p	n/p

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
SGBR	2,471,000	-15.2%	\$366.8m	-23.6%
Queensland	39,272,000	-25.7%	\$4,247.9m	-27.2%
Australia	164,192,000	-33.9%	\$17,433.1m	-33.8%

State comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	16,851,000	-35.0%	66,194,000	-35.7%
NSW	24,447,000	-37.3%	83,772,000	-31.6%
Victoria	13,963,000	-53.1%	46,232,000	-44.6%
Australia	72,514,000	-38.3%	275,404,000	-34.1%
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	6,433,000	-35.7%	25,737,000	-40.7%
NSW	9,699,000	-34.4%	34,735,000	-31.4%
Victoria	5,839,000	-53.1%	19,708,000	-45.0%
Australia	29,391,000	-36.4%	111,252,000	-35.7%

International visitors to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Holiday	18,000	-83.9%	153,000	-86.7%
VFR	n/p	n/p	n/p	n/p
Business	n/p	n/p	n/p	n/p
Education	n/p	n/p	n/p	n/p
Total³	23,000	-83.9%	254,000	-87.8%

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	493,000	-82.3%	12,361,000	-77.5%
NSW	839,000	-80.9%	24,428,000	-74.7%
Victoria	615,000	-80.4%	19,599,000	-73.2%
Australia	1,705,000	-80.4%	68,973,000	-74.9%
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	302,000	-83.9%	4,365,000	-80.9%
NSW	428,000	-82.5%	6,001,000	-79.2%
Victoria	307,000	-81.9%	3,647,000	-79.4%
Total	847,000	-82.0%	17,471,000	-79.3%

Regional snapshots for all Queensland regions are available on the TEQ website. Overview snapshots are also available for both domestic and international visitors. www.teq.queensland.com.

If you have any questions or comments, please email research@queensland.com.

For tourism region definitions, please see <https://www.tra.gov.au/Regional/tourism-regions>.



Wilson Island

Regional Comparison

Year Ending December 2020

Domestic regional comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	% Proportion of Travel Purpose			% Share of Total Visitors
							Holiday %	VFR %	Business %	
Brisbane	4,727,000	-42.8%	14,016,000	-41.4%	3.0	0.1	26%	44%	19%	28%
Gold Coast	2,222,000	-47.1%	7,619,000	-54.0%	3.4	-0.5	49%	37%	10%	13%
TNQ	1,448,000	-34.7%	6,993,000	-37.5%	4.8	-0.2	48%	22%	25%	9%
Sunshine Coast	3,034,000	-25.1%	10,527,000	-27.6%	3.5	-0.1	58%	32%	7%	18%
SGBR	1,788,000	-22.8%	7,044,000	-22.2%	3.9	0.0	33%	29%	28%	11%
SQC	1,646,000	-25.0%	4,718,000	-20.0%	2.9	0.2	31%	35%	26%	10%
Townsville	797,000	-38.6%	2,778,000	-42.0%	3.5	-0.2	35%	27%	28%	5%
Outback*	823,000	-5.6%	4,311,000	0.5%	5.2	n/p	28%	16%	47%	5%
Whitsundays	532,000	-0.4%	2,124,000	-4.4%	4.0	n/p	62%	18%	14%	3%
Fraser Coast*	575,000	-4.5%	1,905,000	-11.4%	3.3	n/p	47%	37%	8%	3%
Mackay*	939,000	3.8%	3,905,000	0.6%	4.2	n/p	15%	13%	63%	6%
Total Queensland	16,851,000	-35.0%	66,194,000	-35.7%	3.9	0.0	38%	34%	22%	100%

* Three-year trend change %²

International regional comparison

Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	% Proportion of Travel Purpose			% Share of Total Visitors
							Holiday %	VFR %	Business %	
Brisbane	273,000	-81.6%	6,306,000	-77.2%	23.1	4.5	46%	31%	8%	55%
Gold Coast	173,000	-84.0%	2,348,000	-76.0%	13.6	4.5	74%	18%	2%	35%
TNQ	133,000	-83.5%	1,451,000	-78.8%	10.9	2.5	89%	7%	2%	27%
Sunshine Coast	56,000	-83.0%	634,000	-77.7%	11.3	2.7	76%	23%	2%	11%
SGBR	23,000	-83.9%	254,000	-87.8%	11.2	-3.6	76%	16%	0%	5%
SQC*	10,000	-24.5%	281,000	-24.1%	28.7	n/p	36%	48%	7%	2%
Townsville	23,000	-81.7%	239,000	-83.5%	10.3	-1.1	75%	16%	2%	5%
Outback*	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Whitsundays	43,000	-80.4%	232,000	-83.1%	5.4	-0.8	95%	2%	1%	9%
Fraser Coast	26,000	-80.3%	168,000	-73.2%	6.5	1.7	89%	9%	1%	5%
Mackay*	7,000	-27.8%	65,000	-28.4%	9.2	n/p	64%	31%	0%	1%
Total Queensland	493,000	-82.3%	12,361,000	-77.5%	25.1	5.3	61%	29%	6%	100%

Notes/Sources:

TNQ= Tropical North Queensland; SGBR = Southern Great Barrier Reef and SQC = Southern Queensland Country

In 2012, the Australian Bureau of Statistics (ABS) changed the way it reports regional statistics. Essentially, the ABS moved from using political boundaries such as local government areas to a framework based on population densities, called the Australian Statistical Geographic Standard (ASGS). Statistical Area 2s (SA2s), which represent one level of the ASGS, replace local government areas (LGA) previously used to define tourism region boundaries. SA2 boundaries closely resemble that of the former tourism region boundaries (defined by LGA boundaries) in Queensland with any differences not being material.

The data included in this report is sourced from the National and International Visitor Surveys (NVS & IVS) conducted by Tourism Research Australia (TRA). These are large and comprehensive surveys that provide valuable data on a national, state, and regional level. The variable nature of travel, combined with sampling variability (which all surveys are subject to) means that regional results need to be viewed as indicative only. It is likely that not all segments of the region will experience the changes noted on a regional level.

Tourism Research Australia has transitioned NVS sampling to 100 per cent mobile phone interview (from 50 per cent mobile phone/50 per cent landline) to reflect current phone usage trends. The change in methodology has seen a break in series so please use caution when comparing 2019 to previous year's results.

2017 and 2018 estimates have been revised to align with the latest release of ABS population projections and will differ slightly from previously published estimates.

'n/p' indicates the data has not been published.

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Footnotes:

1. Annual change refers to the percentage change between the year to the date covered by this report compared to the same period one year prior.
2. Trend change refers to the percentage change between the average of the three years to the date covered by this report, compared to the average for the same period one year prior. Trend change has been used to analyse changes for regions with small sample sizes.
3. This figure includes "Other" visitors.