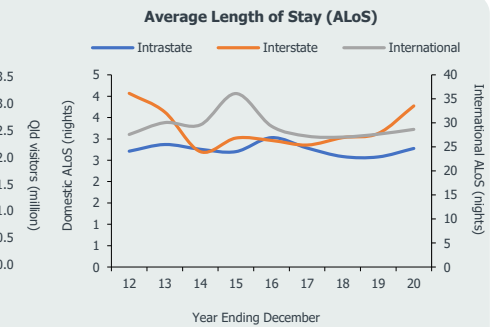
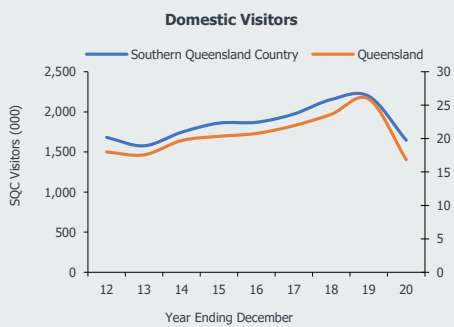


Year Ending December 2020



| | Visitors | Holiday | VFR | Business | Expenditure (\$m) |
|----------------------------------|------------------|----------------|----------------|----------------|-------------------|
| Domestic Overnight | 1,646,000 | 516,000 | 571,000 | 436,000 | \$578.5m |
| Annual % change ¹ | ▼ -25.0% | ▼ -19.6% | ▼ -36.4% | ▼ -16.5% | ▼ -28.6% |
| 3-yr trend % change ² | ▼ -5.2% | ▼ -5.8% | ▼ -6.9% | ▼ -2.9% | ▼ -4.3% |
| International Overnight | 10,000 | n/p | n/p | n/p | \$8.9m |
| 3-yr trend % change | ▼ -24.5% | n/p | n/p | n/p | ▼ -26.6% |
| TOTAL | 1,656,000 | n/p | n/p | n/p | \$587.4m |
| 3-yr trend % change | ▼ -5.6% | n/p | n/p | n/p | ▼ -6.3% |



Domestic Visitors

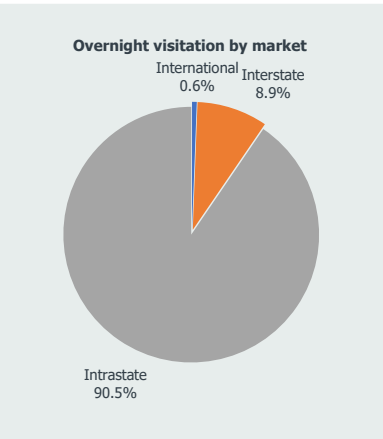
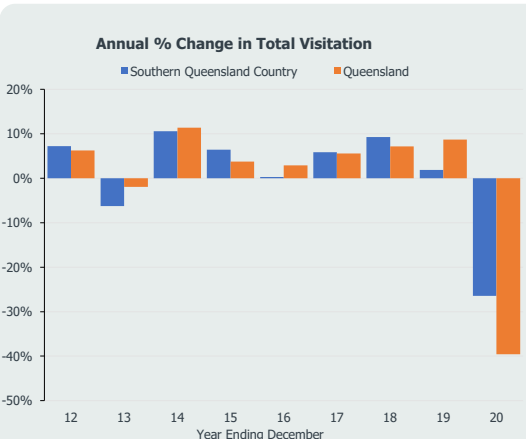
The year ending December 2020 includes all of the major impacts of COVID-19 restrictions on domestic travel to date. Queensland's borders closed on 3 April and all non-essential travel was banned soon after. Intrastate overnight travel was permitted within Queensland from 1 June, while interstate borders 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.

- Domestic visitation in the December quarter 2020 was 7.2 per cent lower compared to the December quarter 2019 and nights decreased by 11.0 per cent. Intrastate visitation increased by 3.9 per cent in the December quarter compared to the previous year.
- In the year ending December 2020, domestic overnight visitor expenditure in Southern Queensland Country decreased by 28.6 per cent to \$578.5 million due to visitation decreasing by 25.0 per cent to 1.6m.
- The Average Length of Stay (ALoS) increased by 0.2 nights to 2.9 nights, while total domestic nights decreased by 20.0 per cent to 4.7m nights. Average spend per night decreased by 10.7 per cent to \$123 per night.
- In the year ending December 2020, decreases in visitation were seen across all purposes of travel. Visiting friends and relatives decreased 36.4 per cent to 571,000, holiday visitation was down by 19.6 per cent to 516,000 and business visitation was down 16.5 per cent to 436,000.
- Intrastate visitation decreased by 14.6 per cent to 1.5m. The largest intrastate markets are Brisbane, which decreased 15.2 per cent to 730,000 visitors, and intraregional travel, which decreased by 27.3 per cent to 289,000. Visitors from the Sunshine Coast increased to 17.9 per cent to 158,000.
- Interstate visitation decreased by 66.4 per cent to 148,000, which included a 59.6 per cent reduction in New South Wales visitation to 110,000 visitors.

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.

- International visitation decreased by 24.5 per cent on average over the past three years to 10,000 in the year ending December 2020. Over the same period visitors ALoS increased by 1.7 per cent on average to 28.7 nights and total nights decreased by 24.1 per cent to 281,000. Overnight visitor expenditure decreased by 26.6 per cent to \$8.9m.



December quarter 2020

| | Domestic | SQC | Queensland |
|-------------------------|----------|-----------|------------|
| Visitors | | 461,000 | 5,112,000 |
| Change vs December 2019 | | -7.2% | -24.3% |
| Nights | | 1,196,000 | 19,855,000 |
| Change vs December 2019 | | -11.0% | -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 Southern Queensland Country

| | Visitors | Annual % Chg | Nights | Annual % Chg | Length of Stay | Year # Chg |
|-----------------------------|------------------|---------------|------------------|---------------|----------------|------------|
| Holiday | 516,000 | -19.6% | 1,269,000 | -20.8% | 2.5 | 0.0 |
| VFR | 571,000 | -36.4% | 1,767,000 | -25.9% | 3.1 | 0.4 |
| Business | 436,000 | -16.5% | 1,298,000 | -19.7% | 3.0 | -0.1 |
| Domestic³ | 1,446,000 | -25.0% | 4,178,000 | -20.0% | 2.9 | 0.2 |
| Intrastate | | | | | | |
| Holiday | 501,000 | 1.3% | 1,225,000 | 7.9% | 2.4 | 0.2 |
| VFR | 499,000 | -35.1% | 1,417,000 | -26.7% | 2.8 | 0.3 |
| Business | 397,000 | 1.4% | 1,161,000 | -4.9% | 2.9 | -0.2 |
| Intrastate | 1,498,000 | -14.6% | 4,160,000 | -8.0% | 2.8 | 0.2 |
| 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 | 148,000 | -66.4% | 558,000 | -59.5% | 3.8 | 0.6 |

Domestic day trip visitors

| Total Visitors | Day trip visitors | Year % Chg | Expenditure (\$) million | Year % Chg |
|------------------|--------------------|---------------|--------------------------|---------------|
| SQC | 3,155,000 | -21.4% | \$397.8m | -16.7% |
| 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 Southern Queensland Country

| All Visitors | Visitors | Trend % Chg | Nights | Trend % Chg |
|--------------------------|---------------|---------------|----------------|---------------|
| Holiday | n/p | n/p | n/p | n/p |
| 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 | 10,000 | -24.5% | 281,000 | -24.1% |

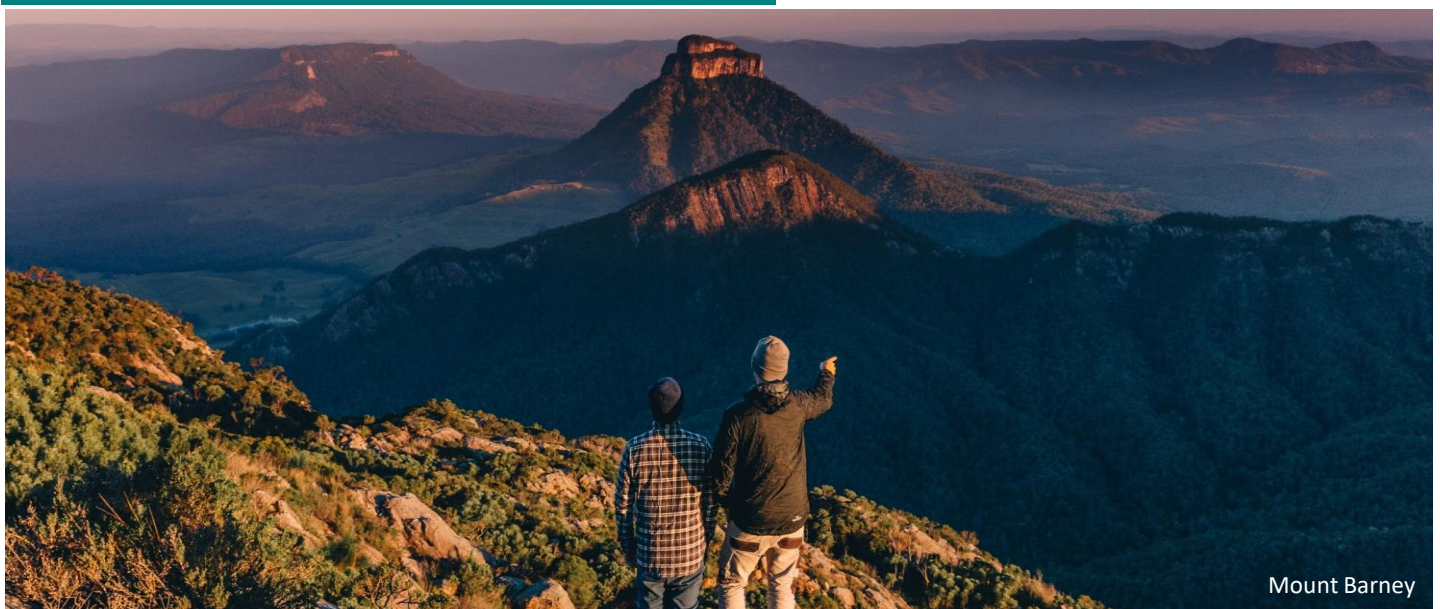
State comparison - International

| 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>.



Mount Barney

Year Ending December 2020

| Domestic regional comparison | | | | | | | % Proportion of Travel Purpose | | | |
|------------------------------|-------------------|---------------|-------------------|---------------|----------------|---------------|--------------------------------|------------|------------|---------------------------|
| Total Visitors | Visitors | Year % Chg | Nights | Year % Chg | Length of stay | Nights change | Holiday % | VFR % | Business % | % Share of Total Visitors |
| 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 | | | | | | | % Proportion of Travel Purpose | | | |
|-----------------------------------|----------------|-----------------|-------------------|-----------------|----------------|---------------|--------------------------------|------------|------------|---------------------------|
| Total Visitors | Visitors | Annual % change | Nights | Annual % change | Length of stay | Nights change | Holiday % | VFR % | Business % | % Share of Total Visitors |
| 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.