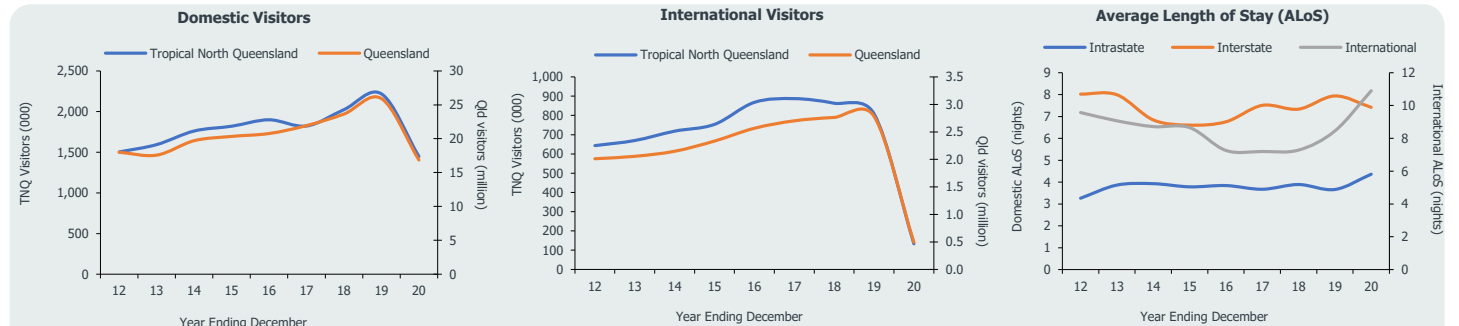


Year Ending December 2020



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	1,448,000	700,000	319,000	363,000	\$1,445.1m
Annual % change ¹	▼ -34.7%	▼ -39.1%	▼ -40.9%	▼ -23.3%	▼ -42.4%
3-yr trend % change ²	▼ -6.2%	▼ -8.0%	▼ -6.0%	▼ -0.6%	▼ -8.5%
International Overnight	133,000	118,000	9,000	n/p	\$180.8m
Annual % change	▼ -83.5%	▼ -84.1%	▼ -79.0%	n/p	▼ -82.4%
3-yr trend % change	▼ -29.5%	▼ -30.0%	▼ -24.1%	n/p	▼ -28.0%
TOTAL	1,581,000	818,000	328,000	n/p	\$1,625.9m
Annual % change	▼ -47.8%	▼ -56.9%	▼ -43.7%	n/p	▼ -54.0%
3-yr trend % change	▼ -13.1%	▼ -17.4%	▼ -7.6%	n/p	▼ -14.6%



Domestic Visitation

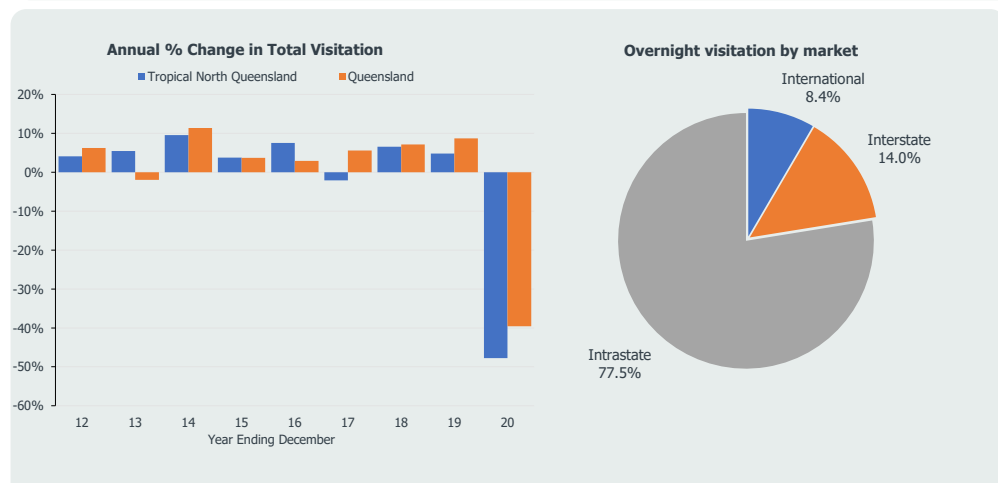
The year ending December 2020 includes all of the major impacts of COVID-19 restrictions on domestic travel to date. Queensland's borders closed on 3 April and all non-essential travel was banned soon after. Intrastate overnight travel was permitted within Queensland from 1 June, while interstate borders 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 18.1 per cent lower than in the December quarter 2019, while nights declined 20.1 per cent. Intrastate visitation decreased by 4.0 per cent in the December quarter 2020 compared to the same period in 2019.
- In the year ending December 2020, domestic Overnight Visitor Expenditure (OVE) in Tropical North Queensland (TNQ) declined by 42.4 per cent to \$1.4 billion on the back of visitation decreasing by 34.7 per cent to 1.4 million and spend per visitor decreasing by 11.7 per cent to \$998 per visitor.
- In the year ending December 2020, the Average Length of Stay (ALoS) decreased by 0.2 nights to 4.8 nights so that visitor nights overall decreased by 37.5 per cent to 7.0m nights.
- The sharp decline was seen across all purposes of visitation. Holiday visitation decreased by 39.1 per cent to 700,000, Visiting Friends and Relatives (VFR) decreased by 40.9 per cent to 319,000 and business visitation decreased by 23.3 per cent to 363,000.
- Intrastate visitation declined by 18.3 per cent to 1.2m. The largest intrastate markets were intraregional (down 16.7 per cent to 616,000), Brisbane (down 21.4 per cent over the year to 206,000) and Townsville (down 29.2 per cent to 204,000).
- Interstate visitation decreased by 69.0 per cent to 222,000, with visitation from New South Wales declining by 58.8 per cent to 119,000.

International Visitation

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 OVE decreased by 82.4 per cent to \$180.8m on the back of an 83.5 per cent decrease in visitation to 133,000. The ALoS increased by 2.5 nights to 10.9 nights while total nights decreased by 78.8 per cent to 1.5m and spend per night decreased by 17.2 per cent to \$125 per night.
- Holidaymakers made up close to nine in 10 (89 per cent) international visitors to TNQ. Holiday visitation decreased by 84.1 per cent to 118,000 and VFR visitation decreased by 79.0 per cent to 9,000.



December quarter 2020

Domestic	TNQ	Queensland
Visitors	470,000	5,112,000
Change vs December 2019	-18.1%	-24.3%
Nights	2,407,000	19,855,000
Change vs December 2019	-20.1%	-24.5%

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

Tropical North Queensland Regional Snapshot

Year Ending December 2020

Domestic visitors to Tropical North Queensland						
	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	700,000	-39.1%	3,038,000	-50.5%	4.3	-1.0
VFR	319,000	-40.9%	1,396,000	-45.9%	4.4	-0.4
Business	363,000	-23.3%	2,232,000	12.0%	6.2	1.9
Domestic³	1,448,000	-34.7%	6,993,000	-37.5%	4.8	-0.2
Intrastate						
Holiday	545,000	-18.3%	2,050,000	-11.8%	3.8	0.3
VFR	287,000	-30.4%	1,068,000	-23.0%	3.7	0.4
Business	339,000	-8.5%	1,937,000	24.5%	5.7	1.5
Intrastate	1,226,000	-18.3%	5,347,000	-2.7%	4.4	0.7
Interstate						
Holiday	155,000	-67.9%	987,000	-74.1%	6.4	-1.5
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	222,000	-69.0%	1,646,000	-71.1%	7.4	-0.5

Domestic day trip visitors				
Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Tropical North Queensland	2,355,000	-28.0%	\$280.3m	-34.5%
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				
All 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 Tropical North Queensland				
All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Holiday	118,000	-84.1%	966,000	-82.0%
VFR	9,000	-79.0%	215,000	-73.0%
Business	n/p	n/p	n/p	n/p
Education	n/p	n/p	n/p	n/p
Total³	133,000	-83.5%	1,451,000	-78.8%

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				
All 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>.



Hartley's Crocodile Adventures

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.