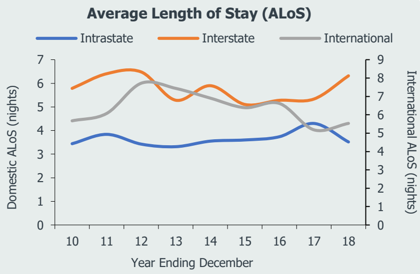
Whitsundays Regional Snapshot

Year Ending December 2018

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	**651,000**	**404,000**	**n/p**	**163,000**	**$745.1m**
3-yr trend % change[2]	▲ 11.8%	▲ 10.8%	n/p	n/p	▲ 15.2%
International Overnight	**234,000**	**225,000**	**n/p**	**n/p**	**$210.8m**
Annual % change	▼ -1.1%	▼ -1.3%	n/p	n/p	▲ 12.5%
3-yr trend % change	▲ 5.5%	▲ 5.5%	n/p	n/p	▲ 4.1%
TOTAL	**885,000**	**629,000**	**n/p**	**n/p**	**$955.9m**
Annual % change	▲ 13.8%	▲ 19.2%	n/p	n/p	▲ 46.4%
3-yr trend % change	▲ 9.8%	▲ 8.6%	n/p	n/p	▲ 12.1%



Domestic Visitors

▪ In late March 2017, Tropical Cyclone (TC) Debbie interrupted tourism operations in several tourism regions. The Whitsundays region was the most affected region. A year and a half after the event, we see that domestic overnight visitation has surpassed levels seen prior to TC Debbie and reached record levels, and expenditure continues to grow strongly.

▪ Domestic visitation to the Whitsundays grew by 11.8% on average over the three years ending December 2018 to a record 651,000. Total overnight visitor expenditure grew by 15.2% on average over the same period to $745.1m. The domestic market accounts for 74% of total overnight visitors and 78% of total visitor expenditure in the region.

▪ Expenditure grew faster than visitation due to visitors increasing their average length of stay (ALoS) in the region by 2.3% on average over the three years to 4.6 nights. As a result, total nights grew by 14.3% to 3.0m. Expenditure per night was steady over the three years at $249/night (-0.7%).

▪ Holiday visitation accounts for 62% of the domestic market. Holiday visitation grew by 10.8% on average over the three years ending December 2018 to 404,000. The business market reached 163,000 visitors, likely driven by workers in the area rebuilding and refurbishing after TC Debbie.

▪ The intrastate market represents 61% of domestic visitation to the region. Intrastate visitation grew by 16.7% on average over the three years to 398,000. In comparison, the interstate market grew by 4.9% on average over the three years to 252,000, with New South Wales residents representing more than half (55%) of interstate visitors to the region.

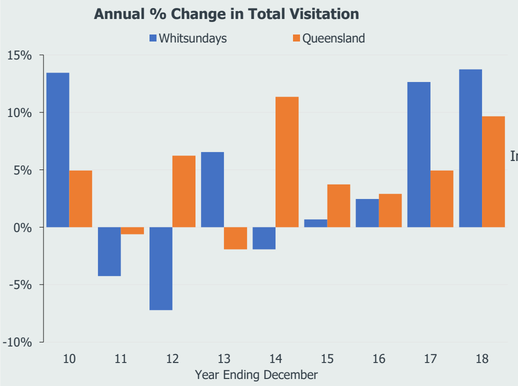
International

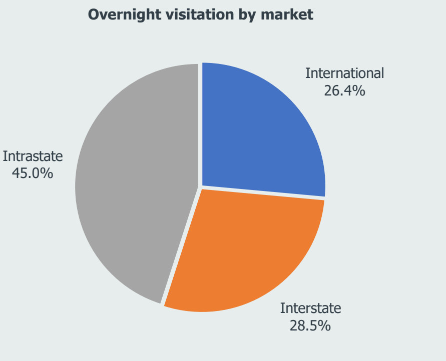
▪ Total international visitation to the Whistundays region decreased slightly (-1.1%) to 234,000 over the year ending December 2018. Over the same period, total overnight visitor expenditure increased by 12.5% to $210.8m.

▪ Overnight visitor expenditure growth was due to visitors lengthening their stay and spending more per night. Spend per night increased by 6.5% to $163/night and ALoS increased by 0.4 of a night to 5.5 nights. In total, visitor nights in the region increased by 5.6% to 1.3m.

▪ Holiday travel represents 96% of international visitation in the region. Holiday visitation decreased by 1.3% over the year to 225,000.

▪ Among the Whitsundays' top 5 markets, visitation increased from the United States (up 20.5% to 20,000) and France (up 19.9% to 14,000), but declined from the United Kingdom (down 7.8% to 47,000), Germany (down 16.9% to 30,000) and China (down 21.0% to 18,000).





Research Updates

To receive an email alert whenever new tourism figures are released click here

Note: N/p indicates where data is not

Whitsundays Regional Snapshot

Domestic visitation Year Ending December 2018

Domestic visitors to the Whitsundays

	Visitors	Trend % Chg	Nights	Trend % Chg	Length of Stay	Year # Chg
Holiday	404,000	10.8%	1,978,000	10.1%	4.9	-0.1
VFR	n/p	n/p	n/p	n/p	n/p	n/p
Business	163,000	n/p	704,000	n/p	4.3	0.1
Domestic[3]	**651,000**	**11.8%**	**2,995,000**	**14.3%**	**4.6**	**0.0**
Intrastate						
Holiday	213,000	16.6%	743,000	7.7%	3.5	-1.1
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
Intrastate	**398,000**	**16.7%**	**1,401,000**	**14.3%**	**3.5**	**-0.8**
Interstate						
Holiday	190,000	5.4%	1,234,000	11.9%	6.5	1.0
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	**252,000**	**4.9%**	**1,595,000**	**14.3%**	**6.3**	**1.0**

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
Whitsundays	n/p	n/p	n/p	n/p
Queensland	44,716,000	9.9%	$5,208.8m	20.0%
Australia	**206,051,000**	**7.4%**	**$22,526.1m**	**10.2%**

Key domestic source markets to the Whitsundays

All Visitors	Visitors	Trend % Chg	Nights	Trend % Chg
Brisbane	n/p	n/p	n/p	n/p
Regional Qld	296,000	13.3%	946,000	6.3%
Sydney	n/p	n/p	n/p	n/p
Regional NSW	n/p	n/p	n/p	n/p
Melbourne	n/p	n/p	n/p	n/p
Regional Vic	n/p	n/p	n/p	n/p

State comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	24,086,000	10.6%	94,732,000	9.5%
NSW	34,554,000	9.4%	107,413,000	7.3%
Victoria	25,687,000	5.0%	73,873,000	4.9%
Australia	**105,600,000**	**8.6%**	**376,087,000**	**7.2%**

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,426,000	9.8%	41,575,000	5.0%
NSW	13,648,000	9.0%	46,347,000	7.1%
Victoria	10,987,000	3.3%	32,481,000	0.6%
Australia	**42,364,000**	**7.6%**	**160,059,000**	**3.6%**

Whitsundays Regional Snapshot

International visitation Year Ending December 2018

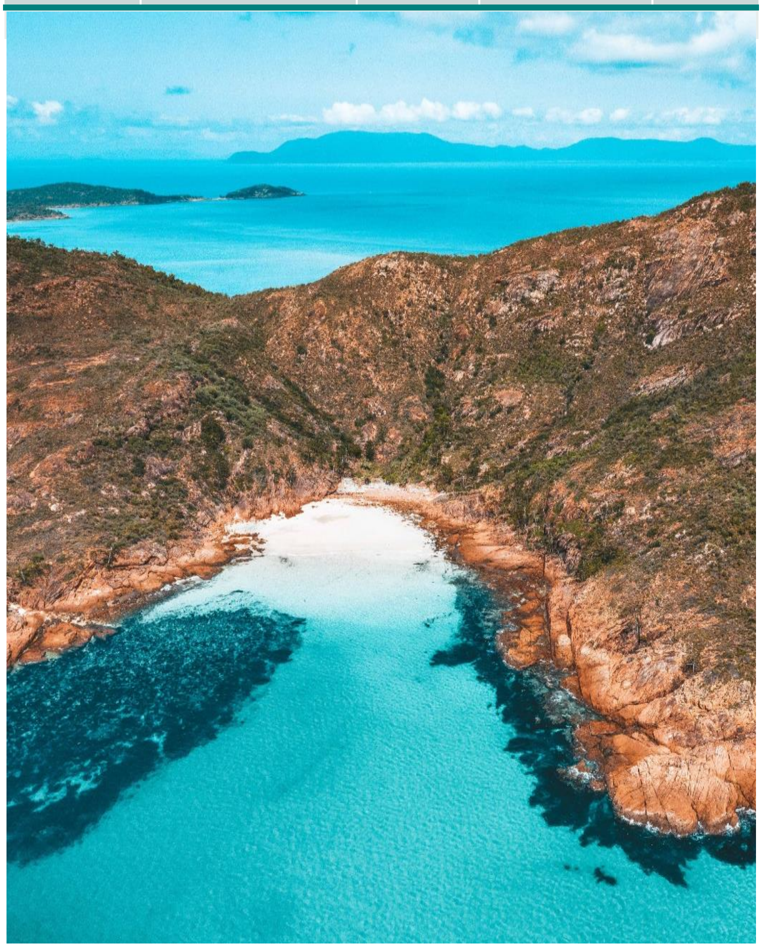
International visitors to the Whitsundays

All Visitors	Visitors	Annual % Chg	Nights	Annual % Chg	Length of Stay	Year # Chg
Holiday	225,000	-1.3%	1,063,000	-3.6%	4.7	-0.1
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
Total[3]	**234,000**	**-1.1%**	**1,294,000**	**5.6%**	**5.5**	**0.4**

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,763,000	2.3%	55,052,000	3.7%
NSW	4,370,000	3.0%	96,204,000	2.4%
Victoria	3,039,000	5.4%	72,872,000	11.2%
Australia	**8,524,000**	**4.8%**	**273,793,000**	**3.8%**

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,867,000	1.0%	22,708,000	-1.5%
NSW	2,479,000	3.3%	28,113,000	1.4%
Victoria	1,606,000	6.2%	16,697,000	3.8%
Total	**4,623,000**	**5.8%**	**82,392,000**	**1.1%**



Top 10 source markets

Total	Visitors	Annual % Chg	Nights	Annual % Chg
United Kingdom	47,000	-7.8%	247,000	2.2%
Germany	30,000	-16.9%	173,000	30.5%
USA	20,000	20.5%	90,000	41.5%
China	18,000	-21.0%	69,000	-26.3%
France	14,000	19.9%	52,000	33.8%
Scandinavia	13,000	2.4%	44,000	-19.9%
New Zealand	11,000	n/p	n/p	n/p
Canada	9,000	2.7%	56,000	20.6%
Switzerland	8,000	-4.6%	29,000	4.1%
Netherlands	8,000	9.5%	42,000	47.1%

For technical reasons, some data may not be publishable (n/p), however the markets will still appear in order.

Top 10 holiday source markets

Holiday	Visitors	Annual % Chg	Nights	Annual % Chg
United Kingdom	45,000	-7.7%	219,000	3.3%
Germany	30,000	-17.4%	149,000	12.5%
USA	19,000	25.7%	80,000	52.2%
China	18,000	-20.5%	69,000	-25.4%
France	14,000	20.8%	52,000	33.0%
Scandinavia	13,000	5.0%	44,000	-8.6%
New Zealand	n/p	n/p	n/p	n/p
Canada	9,000	5.1%	40,000	27.3%
Switzerland	8,000	-2.1%	29,000	6.3%
Netherlands	8,000	9.5%	41,000	44.5%

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.

The tourism regions are defined by the Australian Bureau of Statistics (ABS) as a collection of Statistical Area Level 2s (SA2), please refer to the interactive map at http://stat.abs.gov.au/itt/r.jsp?ABSMaps

Regional Comparison

Year Ending December 2018

Domestic regional comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	% Proportion of Travel Purpose: Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	7,517,000	8.2%	21,883,000	5.8%	2.9	-0.1	29%	39%	24%	31%
Gold Coast	3,795,000	7.2%	14,664,000	9.0%	3.9	0.1	54%	28%	14%	16%
TNQ	2,065,000	13.5%	10,548,000	15.7%	5.1	0.1	51%	24%	21%	9%
Sunshine Coast	3,684,000	8.6%	12,896,000	4.8%	3.5	-0.1	54%	35%	9%	15%
SGBR	2,176,000	13.6%	8,286,000	22.8%	3.8	0.3	35%	25%	33%	9%
SQC	2,205,000	12.7%	5,893,000	6.5%	2.7	-0.2	27%	41%	24%	9%
Townsville	1,378,000	28.3%	4,797,000	33.3%	3.5	0.1	34%	30%	27%	6%
Outback *	884,000	3.1%	4,876,000	12.2%	5.5	n/p	35%	16%	45%	4%
Whitsundays *	**651,000**	**11.8%**	**2,995,000**	**14.3%**	**4.6**	**n/p**	**62%**	**12%**	**25%**	**3%**
Fraser Coast *	772,000	9.5%	3,135,000	11.7%	4.1	n/p	53%	33%	10%	3%
Mackay *	1,046,000	9.5%	4,133,000	13.4%	4.0	n/p	21%	21%	54%	4%
Total Queensland	**24,086,000**	**10.6%**	**94,732,000**	**9.5%**	**3.9**	**0.0**	**39%**	**33%**	**23%**	**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: Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	1,400,000	6.3%	28,718,000	9.7%	20.5	0.6	52%	31%	10%	51%
Gold Coast	1,047,000	1.2%	10,021,000	7.8%	9.6	0.6	78%	15%	4%	38%
TNQ	863,000	-2.7%	6,288,000	-1.6%	7.3	0.1	91%	6%	3%	31%
Sunshine Coast	311,000	3.6%	2,778,000	-9.6%	8.9	-1.3	76%	22%	2%	11%
SGBR	146,000	-2.1%	1,710,000	-33.8%	11.7	-5.6	78%	15%	4%	5%
SQC *	56,000	7.7%	1,501,000	-3.0%	27.0	n/p	38%	33%	15%	2%
Townsville	136,000	-6.9%	1,264,000	-6.2%	9.3	0.1	85%	13%	2%	5%
Outback *	29,000	-0.2%	541,000	2.3%	18.5	n/p	71%	16%	6%	1%
Whitsundays	**234,000**	**-1.1%**	**1,294,000**	**5.6%**	**5.5**	**0.4**	**96%**	**3%**	**0%**	**8%**
Fraser Coast	130,000	-12.7%	510,000	-26.7%	3.9	-0.8	93%	6%	1%	5%
Mackay *	56,000	10.5%	418,000	-14.5%	7.4	n/p	77%	20%	4%	2%
Total Queensland	**2,763,000**	**2.3%**	**55,052,000**	**3.7%**	**19.9**	**0.3**	**68%**	**26%**	**8%**	**100%**

Notes/Sources:

This release of year ending December 2018 data includes purpose-of-visit information and revisions to IVS estimates from 2005 to 2018. Please note results have been revised back to 2005 and are not to be used or compared to previously published data

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.

In 2014, TRA moved to a new methodology for the NVS that included mobile phone interviewing as part of a dual frame overlap survey. This initiative was part of TRA's continuous improvement program. The inclusion of mobile phone users ultimately delivers greater domestic tourism data accuracy as it better reflects the Australian resident population and phone ownership.

The 2014 and 2015 NVS data, including the data for the year ending June 2016, has been back-cast by TRA.

Please visit tra.gov.au for more information on the methodology, back-casting process and impact on results.

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

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.