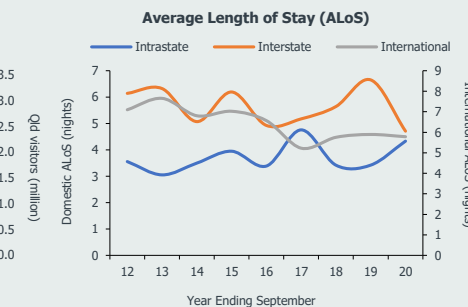
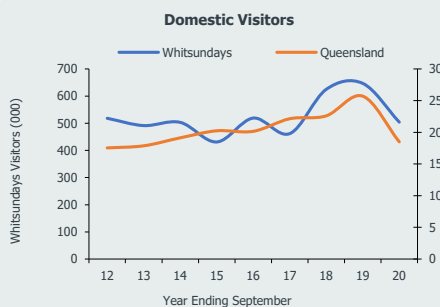


# Whitsundays Regional Snapshot

Year Ending September 2020



|                                  | Visitors       | Holiday        | VFR        | Business   | Expenditure (\$m) |
|----------------------------------|----------------|----------------|------------|------------|-------------------|
| <b>Domestic Overnight</b>        | <b>504,000</b> | <b>289,000</b> | <b>n/p</b> | <b>n/p</b> | <b>\$454.5m</b>   |
| 3-yr trend % change <sup>2</sup> | ▲ 2.4%         | ▲ 3.3%         | n/p        | n/p        | ● 0.2%            |
| <b>International Overnight</b>   | <b>112,000</b> | <b>105,000</b> | <b>n/p</b> | <b>n/p</b> | <b>\$82.5m</b>    |
| Annual % change <sup>1</sup>     | ▼ -49.3%       | ▼ -50.9%       | n/p        | n/p        | ▼ -47.0%          |
| 3-yr trend % change              | ▼ -18.1%       | ▼ -18.4%       | n/p        | n/p        | ▼ -19.3%          |
| <b>TOTAL</b>                     | <b>616,000</b> | <b>394,000</b> | <b>n/p</b> | <b>n/p</b> | <b>\$537.0m</b>   |
| Annual % change                  | ▼ -29.0%       | ▼ -35.7%       | n/p        | n/p        | ▼ -32.1%          |
| 3-yr trend % change              | ▼ -3.5%        | ▼ -5.1%        | n/p        | n/p        | ▼ -4.6%           |



## Domestic Visitors

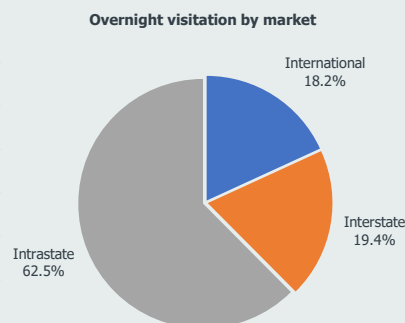
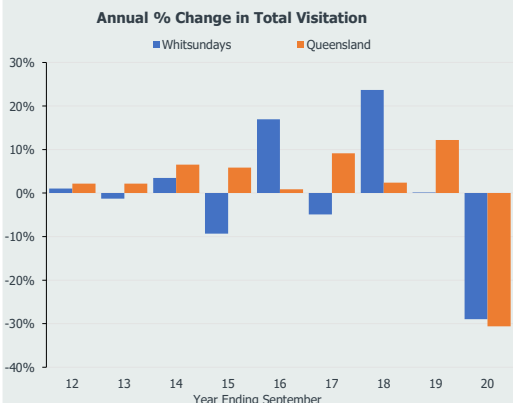
The year ending September 2020 includes all of the major impacts of COVID-19 restrictions on domestic travel to date. Queensland's borders closed on 3 April and all non-essential travel was banned soon after. Intrastate overnight travel was permitted within Queensland from 1 June, while interstate borders were reopened to all states except Victoria on 10 July. Borders were closed again to Greater Sydney on 1 August, then to New South Wales and ACT more broadly on 8 August and remained closed until the end of the quarter.

- In the three years to September 2020, annual domestic Overnight Visitor Expenditure (OVE) in the Whitsundays remained stable (up 0.2 per cent) at \$454.5m, while visitation increased 2.4 per cent on average to 504,000. In part, this reflects the drop in visitation and OVE seen in 2017 due to Cyclone Debbie and the subsequent recovery.
- Average Length of Stay (ALoS) was down by 3.5 per cent on average to 4.4 nights but total nights were stable (down 0.5 per cent on average to 2.2m nights) and as a result spend per night also remained steady (up 0.8 per cent) at \$204 per night.
- Holiday visitation accounts for 57 per cent of domestic visitors to the Whitsundays and increased by 3.3 per cent on average over the past three years to 289,000.
- The growth in visitation over the past three years was due to the intrastate market, which accounts for four quarters (76 per cent) of domestic visitors to the Whitsundays. Intrastate visitation grew by 8.1 per cent on average over the past three years to 385,000. Interstate visitation declined (down 7.3 per cent) on average over the past three years to 119,000.

## International

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 from previous IVS interviews.

- In the year ending September 2020, international OVE in the Whitsundays decreased by 47.0 per cent over the year to \$82.5m. This reflects a combination of a 49.3 per cent reduction in visitation to 112,000 and ALoS decreasing (down by 1.9 nights to 5.8 nights), so that total nights decreased 50.2 per cent over the year to 647,000. The average spend per night was up 6.5 per cent to \$128 per night.
- Holidaymakers account for 93 per cent of international visitors to the Whitsundays. Holiday visitation decreased by 50.9 per cent to 105,000 in the year ending September 2020.



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# Whitsundays Regional Snapshot

Year Ending September 2020

## Domestic visitors to the Whitsundays

|                             | Visitors       | Trend % Chg  | Nights           | Trend % Chg  | Length of Stay | Year # Chg  |
|-----------------------------|----------------|--------------|------------------|--------------|----------------|-------------|
| Holiday                     | 289,000        | 3.3%         | 1,265,000        | -2.7%        | 4.4            | -0.7        |
| 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         |
| <b>Domestic<sup>3</sup></b> | <b>504,000</b> | <b>2.4%</b>  | <b>2,229,000</b> | <b>-0.5%</b> | <b>4.4</b>     | <b>-0.2</b> |
| <b>Intrastate</b>           |                |              |                  |              |                |             |
| Holiday                     | 208,000        | 13.1%        | 845,000          | 5.1%         | 4.1            | 0.7         |
| 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         |
| <b>Intrastate</b>           | <b>385,000</b> | <b>8.1%</b>  | <b>1,667,000</b> | <b>6.3%</b>  | <b>4.3</b>     | <b>0.9</b>  |
| <b>Interstate</b>           |                |              |                  |              |                |             |
| 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         |
| <b>Interstate</b>           | <b>119,000</b> | <b>-7.3%</b> | <b>563,000</b>   | <b>-7.8%</b> | <b>4.7</b>     | <b>-1.9</b> |

## 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       | 40,179,000         | -20.5%        | \$4,491.1m               | -18.9%        |
| <b>Australia</b> | <b>178,723,000</b> | <b>-24.2%</b> | <b>\$19,058.8m</b>       | <b>-24.6%</b> |

## State comparison - Domestic

| All Visitors     | Visitors          | Year % Chg    | Nights             | Year % Chg    |
|------------------|-------------------|---------------|--------------------|---------------|
| Queensland       | 18,494,000        | -28.0%        | 72,621,000         | -28.6%        |
| NSW              | 26,644,000        | -30.5%        | 88,811,000         | -25.5%        |
| Victoria         | 17,241,000        | -41.4%        | 54,525,000         | -33.6%        |
| <b>Australia</b> | <b>80,265,000</b> | <b>-30.6%</b> | <b>300,037,000</b> | <b>-26.8%</b> |
| Holiday Visitors | Visitors          | Year % Chg    | Nights             | Year % Chg    |
| Queensland       | 6,854,000         | -30.3%        | 27,237,000         | -37.6%        |
| NSW              | 9,886,000         | -32.6%        | 33,969,000         | -32.5%        |
| Victoria         | 6,977,000         | -43.8%        | 23,205,000         | -34.6%        |
| <b>Australia</b> | <b>30,797,000</b> | <b>-32.9%</b> | <b>115,869,000</b> | <b>-33.0%</b> |

## International visitors to the Whitsundays

| All Visitors             | Visitors       | Annual % Chg  | Nights         | Year % Chg    |
|--------------------------|----------------|---------------|----------------|---------------|
| Holiday                  | 105,000        | -50.9%        | 470,000        | -55.3%        |
| 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           |
| <b>Total<sup>3</sup></b> | <b>112,000</b> | <b>-49.3%</b> | <b>647,000</b> | <b>-50.2%</b> |

## State comparison - International

| All Visitors     | Visitors         | Year % Chg    | Nights             | Year % Chg    |
|------------------|------------------|---------------|--------------------|---------------|
| Queensland       | 1,269,000        | -54.1%        | 25,481,000         | -53.9%        |
| NSW              | 2,073,000        | -52.8%        | 46,147,000         | -52.8%        |
| Victoria         | 1,501,000        | -52.1%        | 36,976,000         | -50.3%        |
| <b>Australia</b> | <b>4,142,000</b> | <b>-52.2%</b> | <b>134,459,000</b> | <b>-51.2%</b> |
| Holiday Visitors | Visitors         | Year % Chg    | Nights             | Year % Chg    |
| Queensland       | 849,000          | -54.2%        | 10,561,000         | -53.9%        |
| NSW              | 1,137,000        | -54.3%        | 13,044,000         | -56.1%        |
| Victoria         | 798,000          | -52.7%        | 8,289,000          | -53.0%        |
| <b>Australia</b> | <b>2,201,000</b> | <b>-53.0%</b> | <b>39,790,000</b>  | <b>-53.4%</b> |

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](http://www.teq.queensland.com).

If you have any questions or comments, please email [research@queensland.com](mailto: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>



Elysian Retreat

# Regional Comparison

Year Ending September 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                | 5,486,000         | -30.9%        | 16,273,000        | -29.5%        | 3.0            | 0.1           | 26%                            | 43%        | 21%        | 30%                       |
| Gold Coast              | 2,638,000         | -36.0%        | 9,029,000         | -44.8%        | 3.4            | -0.5          | 49%                            | 37%        | 10%        | 14%                       |
| TNQ                     | 1,551,000         | -29.1%        | 7,598,000         | -31.5%        | 4.9            | -0.2          | 49%                            | 23%        | 24%        | 8%                        |
| Sunshine Coast          | 3,186,000         | -19.8%        | 11,319,000        | -20.6%        | 3.6            | 0.0           | 57%                            | 34%        | 7%         | 17%                       |
| SGBR                    | 1,807,000         | -21.9%        | 6,948,000         | -22.1%        | 3.8            | 0.0           | 32%                            | 29%        | 31%        | 10%                       |
| SQC                     | 1,682,000         | -28.3%        | 4,867,000         | -21.5%        | 2.9            | 0.2           | 28%                            | 39%        | 26%        | 9%                        |
| Townsville              | 822,000           | -39.9%        | 3,203,000         | -29.7%        | 3.9            | 0.6           | 34%                            | 29%        | 26%        | 4%                        |
| Outback*                | 852,000           | -4.0%         | 4,341,000         | 4.0%          | 5.1            | n/p           | 24%                            | 14%        | 53%        | 5%                        |
| <b>Whitsundays*</b>     | <b>504,000</b>    | <b>2.4%</b>   | <b>2,229,000</b>  | <b>-0.5%</b>  | <b>4.4</b>     | <b>n/p</b>    | <b>57%</b>                     | <b>20%</b> | <b>20%</b> | <b>3%</b>                 |
| Fraser Coast*           | 568,000           | -1.0%         | 2,086,000         | -9.4%         | 3.7            | n/p           | 48%                            | 35%        | 10%        | 3%                        |
| Mackay*                 | 1,024,000         | 3.9%          | 4,362,000         | 6.9%          | 4.3            | n/p           | 18%                            | 16%        | 58%        | 6%                        |
| <b>Total Queensland</b> | <b>18,494,000</b> | <b>-28.0%</b> | <b>72,621,000</b> | <b>-28.6%</b> | <b>3.9</b>     | <b>0.0</b>    | <b>37%</b>                     | <b>35%</b> | <b>23%</b> | <b>100%</b>               |

\* Three-year trend change %<sup>2</sup>

## 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                | 690,000          | -52.3%          | 12,593,000        | -55.4%          | 18.2           | -1.3          | 53%                            | 30%        | 9%         | 54%                       |
| Gold Coast              | 476,000          | -54.8%          | 4,503,000         | -55.2%          | 9.5            | -0.1          | 78%                            | 16%        | 3%         | 38%                       |
| TNQ                     | 364,000          | -56.8%          | 3,257,000         | -52.1%          | 8.9            | 0.9           | 91%                            | 6%         | 2%         | 29%                       |
| Sunshine Coast          | 151,000          | -52.7%          | 1,362,000         | -52.5%          | 9.0            | 0.0           | 77%                            | 21%        | 3%         | 12%                       |
| SGBR                    | 62,000           | -54.4%          | 752,000           | -62.0%          | 12.1           | -2.4          | 78%                            | 14%        | 3%         | 5%                        |
| SQC*                    | 26,000           | -14.1%          | 781,000           | -13.6%          | 30.6           | n/p           | 39%                            | 43%        | 9%         | 2%                        |
| Townsville              | 61,000           | -51.6%          | 806,000           | -34.1%          | 13.3           | 3.5           | 82%                            | 13%        | 2%         | 5%                        |
| Outback*                | 12,000           | -22.2%          | 266,000           | -23.9%          | 21.8           | n/p           | 57%                            | 25%        | 7%         | 1%                        |
| <b>Whitsundays</b>      | <b>112,000</b>   | <b>-49.3%</b>   | <b>647,000</b>    | <b>-50.2%</b>   | <b>5.8</b>     | <b>-0.1</b>   | <b>93%</b>                     | <b>4%</b>  | <b>1%</b>  | <b>9%</b>                 |
| Fraser Coast            | 66,000           | -47.2%          | 300,000           | -54.6%          | 4.5            | -0.7          | 90%                            | 10%        | 1%         | 5%                        |
| Mackay*                 | 19,000           | -19.0%          | 122,000           | -24.9%          | 6.4            | n/p           | 78%                            | 19%        | 0%         | 1%                        |
| <b>Total Queensland</b> | <b>1,269,000</b> | <b>-54.1%</b>   | <b>25,481,000</b> | <b>-53.9%</b>   | <b>20.1</b>    | <b>0.1</b>    | <b>67%</b>                     | <b>27%</b> | <b>7%</b>  | <b>100%</b>               |

### 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% mobile phone interview (from 50% mobile phone/50% 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.

### Disclaimer:

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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.