

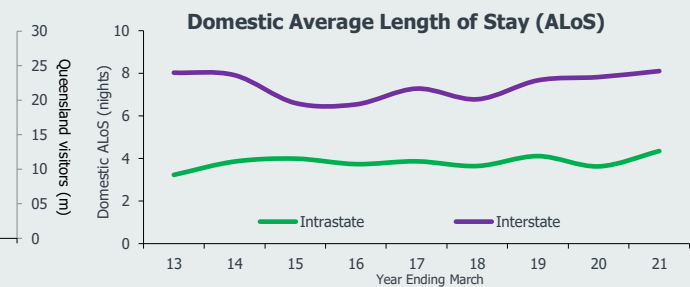
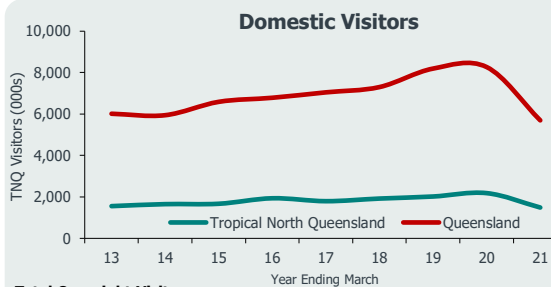
Tropical North Queensland Regional Snapshot



Year Ending March 2021



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	1,487,000	715,000	320,000	373,000	\$1,559.3m
Annual % change ¹	▼ -31.9%	▼ -39.1%	▼ -36.5%	▼ -16.5%	▼ -39.3%
3-yr trend % change ²	▼ -7.1%	▼ -8.7%	▼ -6.8%	○ -0.4%	▼ -7.7%
Change vs Dec 2019	▼ -32.9%	▼ -37.8%	▼ -40.8%	▼ -21.1%	▼ -37.8%
TOTAL OVERNIGHT*	1,488,000	715,000	320,000	373,000	\$1,563.1m
Annual % change	▼ -48.9%	▼ -61.1%	▼ -41.5%	▼ -19.1%	▼ -55.5%
3-yr trend % change	▼ -15.3%	▼ -20.1%	▼ -9.1%	▼ -1.9%	▼ -15.8%
Change vs Dec 2019	▼ -50.8%	▼ -62.3%	▼ -45.0%	▼ -23.7%	▼ -55.8%



Total Overnight Visitors

- In the year ending March 2021, Tropical North Queensland welcomed 1.5 million total (domestic and international) overnight visitors (down 48.9 per cent over the year) who spent \$1.6 billion (down 55.5 per cent over the year).

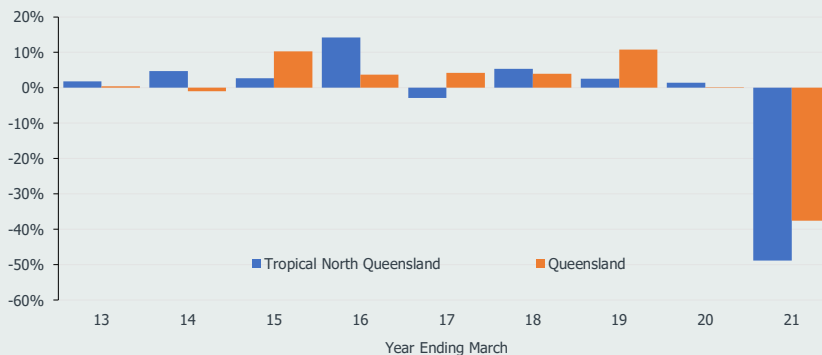
This includes international visitors as well as domestic, but with Australia's borders closed to most countries over the year international results are not being reported on their own.

Domestic Visitation

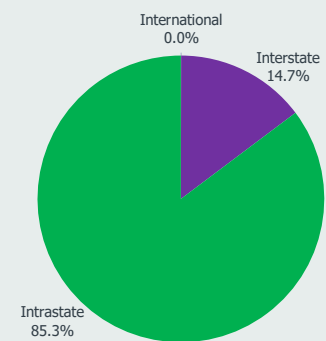
The year ending March 2021 (i.e. 1 April 2020 – 31 March 2021) reflects the full year impacts of COVID-19 on domestic travel that have occurred since the border closures, lockdowns and restrictions that began in late March 2020.

- In the year ending March 2021, domestic Overnight Visitor Expenditure (OVE) in Tropical North Queensland (TNQ) declined by 39.3 per cent to \$1.6b. This was due to visitation decreasing by 31.9 per cent to 1.5m and spend per night decreasing 7.7 per cent to \$214 per night.
- In the year ending March 2021, the average length of stay decreased by 0.2 nights to 4.9 nights so that visitor nights overall decreased by 34.2 per cent to 7.3m nights.
- As the last fully unaffected year, the year ending December 2019 will be seen as the benchmark pre-COVID period. Compared to the year ending December 2019 OVE was down 37.8 per cent, visitation was down 32.9 per cent and visitor nights were down 34.9 per cent.
- The sharp decline in visitation was seen across all purposes of visitation. Holiday visitation decreased by 39.1 per cent to 715,000, visiting friends and relatives decreased by 36.5 per cent to 320,000 and business visitation decreased by 16.5 per cent to 373,000.
- Interstate travel has seen sharp declines due to various restrictions put in place over the year along with consumer preference to travel within their own state. Interstate visitation decreased by 70.8 per cent to 219,000.
- The intrastate market has been less affected than the interstate market, so was comparatively strong. Intrastate visitation decreased by 11.5 per cent to 1.3m so that the intrastate share of visitors increased by 20 percentage points to 85 per cent. The largest intrastate markets were intraregional travel (down 9.1 per cent to 628,000), Townsville (down 16.7 per cent to 220,000) and Brisbane (down 26.1 per cent to 201,000).
- Visitation in the March quarter 2021 was up by 11.2 per cent compared to March quarter 2020 and up by 1.3 per cent compared to March quarter 2019. Visitor nights were up 16.8 per cent compared to March quarter 2020 and up 9.4 per cent compared to March quarter 2019. Intrastate visitation grew by 16.5 per cent compared to the March quarter 2020, while interstate visitation which was down 3.1 per cent over the same period.

Annual % change in Total Overnight Visitation



Overnight visitation by market



Tropical North Queensland Regional

Year Ending March 2021

Domestic overnight visitors to Tropical North Queensland

	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019	Length of Stay	Year # Chg	Change vs YE Dec 2019
Holiday	715,000	-39.1%	-37.8%	3,315,000	-47.1%	-45.9%	4.6	-0.7	-0.7
VFR	320,000	-36.5%	-40.8%	1,565,000	-36.2%	-39.3%	4.9	0.0	0.1
Business	373,000	-16.5%	-21.1%	2,126,000	21.0%	6.7%	5.7	1.8	1.5
Domestic³	1,487,000	-31.9%	-32.9%	7,288,000	-34.2%	-34.9%	4.9	-0.2	-0.1
Intrastate									
Holiday	580,000	-9.2%	-13.0%	2,376,000	10.9%	2.2%	4.1	0.7	0.6
VFR	276,000	-28.2%	-33.1%	1,094,000	-17.5%	-21.1%	4.0	0.5	0.6
Business	342,000	-3.9%	-7.5%	1,833,000	31.6%	17.8%	5.4	1.4	1.1
Intrastate	1,269,000	-11.5%	-15.5%	5,515,000	6.1%	0.3%	4.3	0.7	0.7
Interstate									
Holiday	135,000	-74.9%	-72.1%	939,000	-77.2%	-75.3%	7.0	-0.7	-0.9
VFR	n/p	n/p	np	n/p	n/p	np	n/p	n/p	np
Business	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	219,000	-70.8%	-69.5%	1,774,000	-69.8%	-68.8%	8.1	0.3	0.2

Domestic day trip visitors TNQ

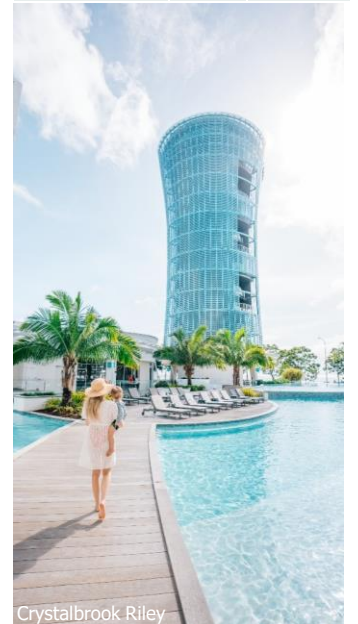
Total Visitors	Day trip visitors	Year % Chg	Change vs YE Dec 2019	Expenditure (\$) million	Year % Chg	Change vs YE Dec 2019
TNQ	2,625,000	-8.7%	-19.7%	\$287.5m	-25.0%	-32.9%
Queensland	39,106,000	-22.1%	-26.0%	\$4,066.4m	-29.7%	-30.3%
Australia	158,468,000	-33.6%	-36.2%	\$16,742.5m	-35.3%	-36.4%

State comparison - Domestic Overnight

All Visitors	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019
Queensland	17,087,000	-31.1%	-34.1%	68,773,000	-30.2%	-33.2%
NSW	24,920,000	-33.1%	-36.1%	86,514,000	-26.7%	-29.4%
Victoria	13,351,000	-52.8%	-55.1%	45,933,000	-43.6%	-45.0%
Australia	72,805,000	-35.2%	-38.0%	281,126,000	-30.6%	-32.7%
Holiday Visitors	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019
Queensland	6,848,000	-28.3%	-31.6%	27,906,000	-32.5%	-35.7%
NSW	10,414,000	-24.6%	-29.6%	37,579,000	-19.6%	-25.8%
Victoria	5,996,000	-49.5%	-51.8%	20,604,000	-42.9%	-42.5%
Australia	31,330,000	-28.0%	-32.2%	118,884,000	-28.2%	-31.3%

March quarterly Data

	TNQ	Queensland
Overnight Visitors	394,000	5,137,000
Change over the year	11.2%	4.8%
Change vs 2019	1.3%	-14.5%
Nights	2,053,000	21,822,000
Change over the year	16.8%	13.4%
Change vs 2019	9.4%	-7.6%



Crystalbrook Riley

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Cairns Esplanade Lagoon



Regional Comparison



Year Ending March 2021

Domestic overnight regional comparison

Total Visitors	Visitors	Year % Chg	Change vs 2019	Nights	Year % Chg	Change vs 2019	Length of stay	Nights change	Change vs 2019	% Proportion of Travel Purpose			% Share of Total Visitors
										Holiday %	VFR %	Business %	
Brisbane	4,631,000	-41.1%	-43.4%	13,885,000	-38.9%	-41.4%	3.0	0.1	0.1	29%	44%	17%	27%
Gold Coast	2,445,000	-37.7%	-41.8%	8,050,000	-46.4%	-51.4%	3.3	-0.5	-0.6	50%	36%	10%	14%
TNQ	1,487,000	-31.9%	-32.9%	7,288,000	-34.2%	-34.9%	4.9	-0.2	-0.1	48%	21%	25%	9%
Sunshine Coast	3,137,000	-17.9%	-22.5%	10,955,000	-23.8%	-24.7%	3.5	-0.3	-0.1	59%	31%	6%	18%
SGBR	1,830,000	-19.0%	-21.0%	7,386,000	-14.4%	-18.4%	4.0	0.2	0.1	36%	29%	26%	11%
SQC	1,773,000	-17.7%	-20.5%	5,662,000	3.1%	-4.0%	3.2	0.6	0.5	28%	38%	25%	10%
Townsville	731,000	-40.4%	-43.7%	3,025,000	-32.7%	-36.8%	4.1	0.5	0.4	38%	29%	24%	4%
Outback*	855,000	-23.6%	-25.7%	4,397,000	-26.5%	-28.0%	5.1	n/p	-0.2	28%	19%	43%	5%
Whitsundays*	528,000	-15.3%	-16.3%	2,202,000	-18.0%	-21.0%	4.2	n/p	-0.3	67%	16%	11%	3%
Fraser Coast*	579,000	-22.1%	-24.5%	1,957,000	-37.0%	-36.1%	3.4	n/p	-0.6	51%	34%	6%	3%
Mackay*	874,000	-20.5%	-17.8%	3,778,000	-11.5%	-13.7%	4.3	n/p	0.2	16%	14%	61%	5%
Total Queensland	17,087,000	-31.1%	-34.1%	68,773,000	-30.2%	-33.2%	4.0	0.1	0.1	40%	34%	20%	100%

* Three-year trend change %²

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.

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.

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