

Gold Coast Regional Snapshot

Year Ending December 2020



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	2,222,000	1,092,000	816,000	223,000	\$1,853.7m
Annual % change ¹	▼ -47.1%	▼ -49.5%	▼ -41.5%	▼ -55.4%	▼ -49.8%
3-yr trend % change ²	▼ -11.6%	▼ -14.0%	▼ -8.2%	▼ -12.4%	▼ -10.8%
International Overnight	173,000	128,000	31,000	n/p	\$271.9m
Annual % change	▼ -84.0%	▼ -84.9%	▼ -81.7%	n/p	▼ -79.7%
3-yr trend % change	▼ -27.3%	▼ -28.0%	▼ -25.1%	n/p	▼ -23.5%
TOTAL	2,395,000	1,221,000	847,000	n/p	\$2,125.6m
Annual % change	▼ -54.7%	▼ -59.5%	▼ -45.8%	n/p	▼ -57.8%
3-yr trend % change	▼ -15.0%	▼ -18.0%	▼ -10.2%	n/p	▼ -14.4%



Domestic Visitors

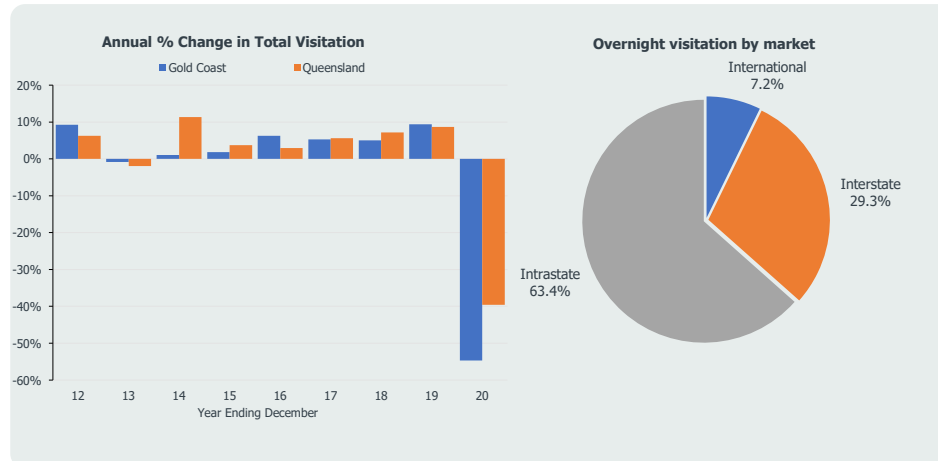
The year ending December 2020 includes all of the major impacts of COVID-19 restrictions on domestic travel to date. Queensland's borders closed on 3 April and all non-essential travel was banned soon after. Intrastate overnight travel was permitted within Queensland from 1 June, while interstate borders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

- Visitation in the December quarter 2020 was 38.2 per cent lower than in the December quarter 2019, with visitor nights down 37.8 per cent over the same period. Encouragingly, intrastate visitation was steady (down 0.9 per cent) in the December quarter 2020 compared to the same quarter in 2019.
- In the year ending December 2020, domestic overnight visitor expenditure decreased by 49.8 per cent to \$1.9 billion. This was the result of total visitation decreasing by 47.1 per cent to 2.2 million and visitors' Average Length of Stay (ALoS) decreasing by 0.5 nights to 3.4 nights, so total nights decreased by 54.0 per cent to 7.6m. Average spend per night increased by 9.1 per cent to \$243 per night.
- Visitation decreased across all travel purposes, with the largest drop from business visitors (down 55.4 per cent to 223,000), followed by holiday visitors (down 49.5 per cent to 1.1m) and Visiting Friends and Relatives (VFR) (down 41.5 per cent to 816,000).
- Reflecting border closures, the interstate market led the fall in visitation, decreasing by 67.7 per cent to 702,000. This included an 80.6 per cent decrease from Victoria to 124,000 and a 59.9 per cent decrease from New South Wales to 502,000.
- Intrastate visitation fell 25.0 per cent to 1.5m. The largest intrastate market is Brisbane, which decreased 22.8 per cent to 1.1m.

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.

- In the year ending December 2020, international visitor expenditure on the Gold Coast decreased by 79.7 per cent to \$271.9m, reflecting an 84.0 per cent decrease in visitation (to 173,000 visitors).
- In the year ending December 2020, visitors' ALoS increased by 4.5 nights to 13.6 nights so that when combined with the decrease in visitation, total visitor nights on the Gold Coast decreased by 76.0 per cent to 2.3m. Spend per night decreased 15.7 per cent to \$116 per night.
- Reflecting border closures, visitation decreased across all purposes of travel: holiday (down 84.9 per cent to 128,000), VFR (down 81.7 per cent to 31,000) and education (down 71.0 per cent to 7,000).



December quarter 2020

Domestic	Gold Coast	Queensland
Visitors	672,000	5,112,000
Change vs December 2019	-38.2%	-24.3%
Nights	2,315,000	19,855,000
Change vs December 2019	-37.8%	-24.5%

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Gold Coast Regional Snapshot

Domestic visitation Year Ending December 2020

Domestic visitors to the Gold Coast

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	1,092,000	-49.5%	4,151,000	-55.9%	3.8	-0.6
VFR	816,000	-41.5%	2,470,000	-42.7%	3.0	-0.1
Business	223,000	-55.4%	542,000	-62.8%	2.4	-0.5
Domestic³	2,222,000	-47.1%	7,619,000	-54.0%	3.4	-0.5

Intrastate

Holiday	759,000	-22.4%	2,100,000	-20.2%	2.8	0.1
VFR	574,000	-23.7%	1,255,000	-21.8%	2.2	0.1
Business	n/p	n/p	n/p	n/p	n/p	n/p
Intrastate	1,519,000	-25.0%	3,840,000	-33.8%	2.5	-0.3

Interstate

Holiday	334,000	-71.8%	2,051,000	-69.8%	6.1	0.4
VFR	243,000	-62.3%	1,215,000	-55.1%	5.0	0.8
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	702,000	-67.7%	3,779,000	-64.9%	5.4	0.4

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Gold Coast	6,280,000	-29.3%	\$595.4m	-34.2%
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 the Gold Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Holiday	128,000	-84.9%	984,000	-77.8%
VFR	31,000	-81.7%	680,000	-70.6%
Business	n/p	n/p	n/p	n/p
Education	7,000	-71.0%	525,000	-77.6%
Total³	173,000	-84.0%	2,348,000	-76.0%

State comparison - International

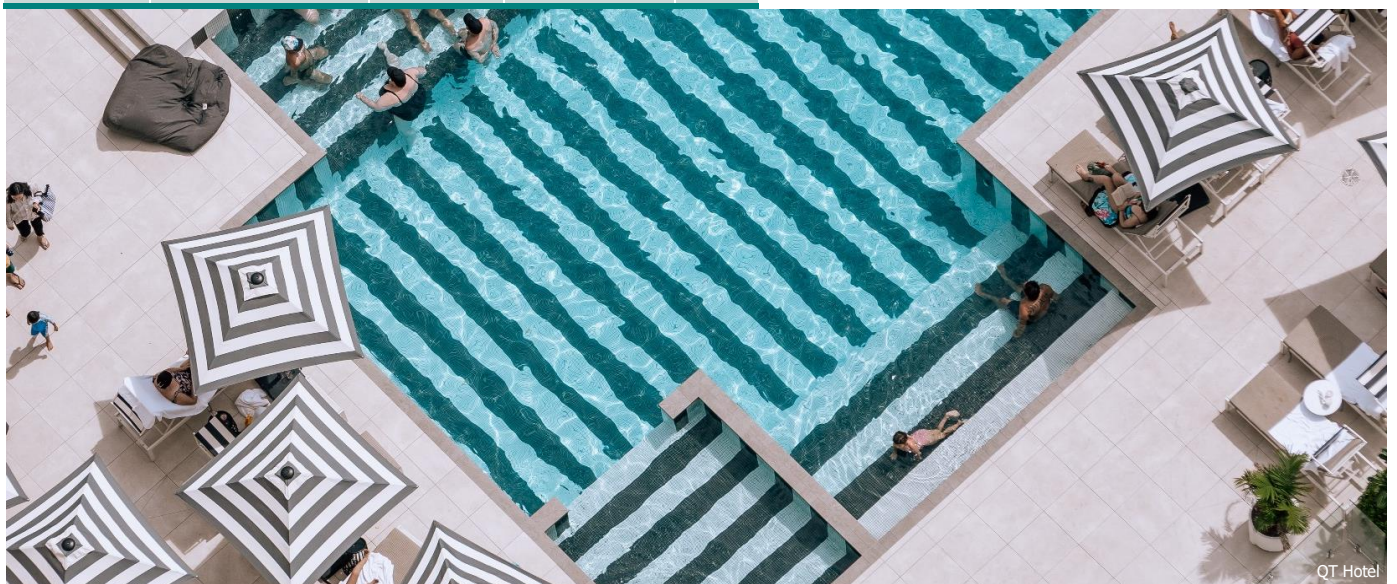
All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	493,000	-82.3%	12,361,000	-77.5%
NSW	839,000	-80.9%	24,428,000	-74.7%
Victoria	615,000	-80.4%	19,599,000	-73.2%
Australia	1,705,000	-80.4%	68,973,000	-74.9%

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
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>



Regional Comparison

Year Ending December 2020

Domestic regional comparison							% Proportion of Travel Purpose			% Share of Total Visitors
Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	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	np	28%	16%	47%	5%
Whitsundays	532,000	-0.4%	2,124,000	-4.4%	4.0	np	62%	18%	14%	3%
Fraser Coast*	575,000	-4.5%	1,905,000	-11.4%	3.3	np	47%	37%	8%	3%
Mackay*	939,000	3.8%	3,905,000	0.6%	4.2	np	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			% Share of Total Visitors
Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	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	np	36%	48%	7%	2%
Townsville	23,000	-81.7%	239,000	-83.5%	10.3	-1.1	75%	16%	2%	5%
Outback*	np	np	np	np	np	np	np	np	np	np
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	np	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.