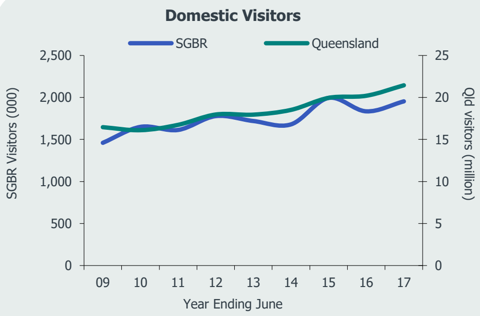
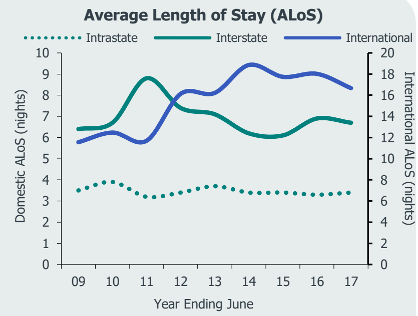
# Southern Great Barrier Reef Regional Snapshot

## Year Ending June 2017

| | Visitors | Holiday | VFR | Business | Expenditure ($m) |
|---|---|---|---|---|---|
| **Domestic Overnight** | **1,954,000** | **685,000** | **609,000** | **482,000** | **$1,090.2m** |
| Annual % change[1] | ▲ 6.5% | ▲ 26.3% | ▲ 6.4% | ▼ -12.2% | ▲ 14.1% |
| 3yr trend % change[2] | ▲ 5.0% | ▲ 10.2% | ▲ 2.7% | ● -0.2% | ▲ 6.1% |
| **International Overnight** | **148,000** | **116,000** | **18,000** | **6,000** | **$98.7m** |
| Annual % change | ▲ 10.0% | ▲ 14.0% | ▼ -5.6% | ▲ 27.2% | ▼ -6.3% |
| 3yr trend % change | ▲ 6.1% | ▲ 8.4% | ▲ 3.3% | ▲ 4.2% | ▲ 5.9% |
| **TOTAL** | **2,102,000** | **801,000** | **626,000** | **489,000** | **$1,188.8m** |
| Annual % change | ▲ 6.7% | ▲ 24.3% | ▲ 6.0% | ▼ -11.8% | ▲ 12.0% |
| 3yr trend % change | ▲ 5.0% | ▲ 10.0% | ▲ 2.7% | ● -0.1% | ▲ 6.1% |








### Domestic Visitors

▪ Domestic visitation is vital to the Southern Great Barrier Reef (SGBR) region, accounting for 93% of overnight travellers and 92% of overnight expenditure in the region.

▪ In the year ending June 2017, domestic overnight visitation to the SGBR region grew 6.5% to 2.0m visitors. It is in line with Queensland's overall growth rate of 6.2%.

▪ Nearly nine in ten (88%) domestic visitors come from the intrastate market, with visitation growing 8.2% to 1.7m visitors. Intra-regional travel from within SGBR was the primary driver of growth and remains the region's largest intrastate market.

▪ Interstate visitation declined 4.5% to 240,000 as a result of fewer Melbourne and NSW visitors to the region. While overall interstate visitation was down, holiday travel recorded strong growth of 25.8% to 570,000, accounting for half (48%) of the interstate market.

▪ Strong growth in holiday travel, up 26.3% to 685,000 visitors, and visiting friends and relatives (VFR), up 6.4% to 609,000, helped to offset a decline in business travel, down 12.2% to 482,000.

▪ This robust growth, particularly in holiday travel, helped to drive domestic expenditure to a record high of $1.1bn, up 14.1%.

### International Visitors

▪ International visitation to the SGBR region increased 10.0% to 148,000 visitors in the year ending June 2017. The international market accounted for 7% of overnight visitation and 8% of total overnight expenditure in the region.

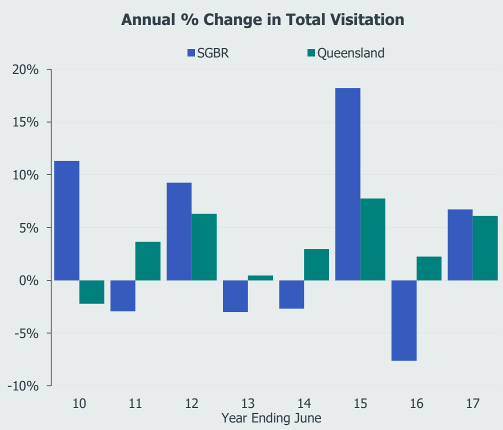
▪ The region saw strong growth from Germany (up 24.1% to 24,000 visitors) and the US (up 40.4% to 13,000 visitors). The UK, the region's top international source market, also saw growth, up by 8.7% to 26,000 visitors.

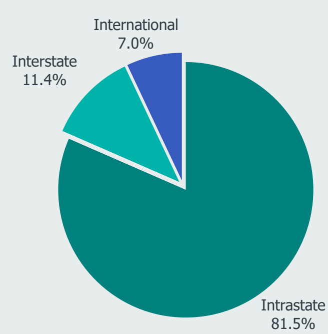
▪ There were slightly fewer New Zealand visitors to the region, down 3.7% to 17,000, however, those who did come stayed longer, with the average length of stay up by 3.4 nights on average, to 14.7 nights.

▪ Nearly four in five (79%) international visitors came to the SGBR region for holiday purposes. Holiday visitation grew by 14.0% year on year to 116,000 visitors.

▪ While there was strong growth in visitation, trips were shorter with the average length of stay (ALoS) down by 1.4 nights, to 16.7 nights on average.

▪ The shorter trip length contributed to a decline in international visitor expenditure, down 6.3% to $98.7m in the year ending June 2017.




In late March 2017, Cyclone Debbie and subsequent flooding interrupted tourism operations in several tourism regions, including SGBR. A holistic view of the impact to regional performance may be shown in the Sep17 / Dec17 TRA data releases.

**Research Updates**

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

# Southern Great Barrier Reef Regional Snapshot

## Domestic visitation Year Ending June 2017

### Domestic Visitors to SGBR

| | Visitors | Year % Chg | Nights | Year % Chg | Length of Stay | Year # Chg |
|---|---|---|---|---|---|---|
| Holiday | 685,000 | 26.3% | 2,856,000 | 46.3% | 4.2 | 0.6 |
| VFR | 609,000 | 6.4% | 1,970,000 | -0.4% | 3.2 | -0.3 |
| Business | 482,000 | -12.2% | 1,918,000 | -23.4% | 4.0 | -0.6 |
| **Domestic[3]** | **1,954,000** | 6.5% | **7,426,000** | 5.7% | **3.8** | 0.0 |
| **Intrastate** | | | | | | |
| Holiday | 570,000 | 25.8% | 1,938,000 | 45.5% | 3.4 | 0.5 |
| VFR | 549,000 | 10.0% | 1,603,000 | 9.2% | 2.9 | 0.0 |
| Business | 440,000 | -8.6% | 1,687,000 | -17.6% | 3.8 | -0.5 |
| **Intrastate** | **1,714,000** | 8.2% | **5,814,000** | 9.6% | **3.4** | 0.1 |
| **Interstate** | | | | | | |
| Holiday | 115,000 | 28.5% | 918,000 | 48.0% | 8.0 | 1.1 |
| VFR | 60,000 | -18.3% | 368,000 | -28.1% | 6.2 | -0.8 |
| Business | n/p | n/p | n/p | n/p | n/p | n/p |
| **Interstate** | **240,000** | -4.5% | **1,612,000** | -6.4% | **6.7** | -0.2 |

### Domestic day trip visitors

| Total Visitors | Day trip visitors | Year % Chg | Expenditure ($) million | Year % Chg |
|---|---|---|---|---|
| SGBR | 2,638,000 | 11.2% | $345.2m | -12.9% |
| Queensland | 39,918,000 | -3.1% | $4,248.7m | -3.3% |
| **Australia** | **187,704,000** | **-0.3%** | **$19,734.2m** | **2.9%** |

### Key domestic source markets to SGBR

| All Visitors | Visitors | Year % Chg | Nights | Year % Chg |
|---|---|---|---|---|
| Brisbane | 435,000 | -8.7% | 2,153,000 | 38.5% |
| Regional Qld | 1,279,000 | 15.5% | 3,660,000 | -2.4% |
| Sydney | 55,000 | -9.2% | 333,000 | -9.1% |
| Regional NSW | 66,000 | -14.1% | 316,000 | -24.6% |
| 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 | 21,453,000 | 6.2% | 83,699,000 | 6.3% |
| NSW | 30,122,000 | 5.6% | 96,876,000 | 5.9% |
| Victoria | 23,180,000 | 9.2% | 66,472,000 | 6.3% |
| **Australia** | **93,708,000** | **5.2%** | **337,914,000** | **3.7%** |

| Holiday Visitors | Visitors | Year % Chg | Nights | Year % Chg |
|---|---|---|---|---|
| Queensland | 8,262,000 | -0.3% | 36,906,000 | 2.8% |
| NSW | 11,821,000 | 0.6% | 40,396,000 | -2.5% |
| Victoria | 10,092,000 | 6.6% | 30,585,000 | 5.8% |
| **Australia** | **37,683,000** | **2.3%** | **144,318,000** | **1.2%** |

# Southern Great Barrier Reef Regional Snapshot

## International visitation Year Ending June 2017

### International Visitors to SGBR

| All Visitors | Visitors | Year % Chg | Nights | Year % Chg | Length of Stay | Year # Chg |
|---|---|---|---|---|---|---|
| Holiday | 116,000 | 14.0% | 1,117,000 | 10.7% | 9.6 | -0.3 |
| VFR | 18,000 | -5.6% | 329,000 | -34.4% | 18.6 | -8.2 |
| Business | 6,000 | 27.2% | 72,000 | -32.0% | 11.3 | -9.8 |
| **Total[3]** | **148,000** | **10.0%** | **2,463,000** | **1.8%** | **16.7** | **-1.4** |

### State Comparison - International

| All Visitors | Visitors | Year % Chg | Nights | Year % Chg |
|---|---|---|---|---|
| Queensland | 2,619,000 | 5.6% | 53,912,000 | 3.7% |
| NSW | 4,008,000 | 9.9% | 92,516,000 | 6.5% |
| Victoria | 2,761,000 | 7.7% | 67,380,000 | 14.6% |
| **Australia** | **7,769,000** | **8.7%** | **265,386,000** | **7.3%** |
| **Holiday Visitors** | **Visitors** | **Year % Chg** | **Nights** | **Annual % Change** |
| Queensland | 1,829,000 | 6.5% | 23,365,000 | 5.7% |
| NSW | 2,360,000 | 10.4% | 27,791,000 | 6.2% |
| Victoria | 1,516,000 | 8.0% | 16,538,000 | 12.1% |
| **Total** | **4,369,000** | **9.5%** | **83,497,000** | **6.4%** |

### Top 5 source markets

| Total | Visitors | Year % Chg | Nights | Year % Chg |
|---|---|---|---|---|
| UK | 26,000 | 8.7% | 261,000 | -17.1% |
| Germany | 24,000 | 24.1% | 132,000 | -38.7% |
| NZ | 17,000 | -3.7% | 242,000 | 25.2% |
| USA | 13,000 | 40.4% | 158,000 | -13.0% |
| France | 7,000 | 16.7% | 81,000 | -22.4% |

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

### Top 5 holiday source markets

| Holiday | Visitors | Year % Chg | Nights | Year % Chg |
|---|---|---|---|---|
| UK | 23,000 | 17.1% | 186,000 | 72.4% |
| Germany | 23,000 | 22.7% | 112,000 | -40.9% |
| USA | 11,000 | 53.5% | 56,000 | 70.1% |
| France | 7,000 | 24.0% | 70,000 | 81.5% |
| Netherlands | 7,000 | 78.7% | 43,000 | 98.2% |

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.

The SGBR region includes the Capricorn, Gladstone and Bundaberg regions.

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

## Year Ending June 2017

### 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 | 6,416,000 | 11.8% | 18,977,000 | 10.2% | 3.0 | 0.0 | 24% | 40% | 27% | 30% |
| Gold Coast | 3,953,000 | 7.2% | 14,635,000 | 11.9% | 3.7 | 0.2 | 54% | 33% | 11% | 18% |
| Sunshine Coast | 3,424,000 | 4.9% | 12,359,000 | 4.4% | 3.6 | 0.0 | 54% | 35% | 7% | 16% |
| Fraser Coast* | 571,000 | -0.1% | 2,427,000 | 4.2% | 4.2 | n/p | 51% | 34% | 14% | 3% |
| Southern Qld Country | 1,876,000 | 3.5% | 5,531,000 | 14.6% | 2.9 | 0.2 | 28% | 41% | 23% | 9% |
| **SGBR** | **1,954,000** | **6.5%** | **7,426,000** | **5.7%** | **3.8** | **0.0** | **35%** | **31%** | **25%** | **9%** |
| Mackay* | 883,000 | 10.4% | 3,391,000 | 12.4% | 3.8 | n/p | 22% | 22% | 50% | 4% |
| Whitsundays* | 518,000 | 0.5% | 2,411,000 | 5.4% | 4.7 | n/p | 58% | 18% | 23% | 2% |
| Townsville | 1,096,000 | -9.1% | 3,716,000 | -13.1% | 3.4 | -0.1 | 33% | 26% | 29% | 5% |
| Outback* | 792,000 | 9.1% | 3,058,000 | 0.3% | 3.9 | n/p | 32% | 16% | 44% | 4% |
| TNQ | 1,805,000 | -4.0% | 8,822,000 | -8.2% | 4.9 | -0.2 | 50% | 24% | 21% | 8% |
| **Total Domestic** | **21,453,000** | **6.2%** | **83,699,000** | **6.3%** | **3.9** | **0.0** | **39%** | **35%** | **22%** | **-** |

** 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 | 1,215,000 | 3.9% | 26,160,000 | 8.9% | 21.5 | 1.0 | 54% | 29% | 9% | 46% |
| Gold Coast | 1,056,000 | 7.2% | 9,979,000 | -1.8% | 9.5 | -0.9 | 80% | 15% | 3% | 40% |
| Sunshine Coast | 296,000 | 11.6% | 3,039,000 | 7.8% | 10.3 | -0.4 | 79% | 17% | 3% | 11% |
| Fraser Coast | 148,000 | 12.4% | 652,000 | 9.3% | 4.4 | -0.1 | 94% | 5% | 0% | 6% |
| Southern Qld Country* | 46,000 | 3.6% | 1,337,000 | 0.0% | 28.9 | n/p | 43% | 38% | 9% | 2% |
| **SGBR** | **148,000** | **10.0%** | **2,463,000** | **1.8%** | **16.7** | **-1.4** | **79%** | **12%** | **4%** | **6%** |
| Mackay* | 45,000 | 0.0% | 431,000 | -14.6% | 9.6 | n/p | 76% | 14% | 7% | 2% |
| Whitsundays | 241,000 | 8.7% | 1,371,000 | -5.3% | 5.7 | -0.8 | 97% | 2% | 0% | 9% |
| Townsville | 132,000 | 7.5% | 1,256,000 | -32.1% | 9.5 | -5.5 | 83% | 10% | 4% | 5% |
| Outback* | 26,000 | -0.1% | 471,000 | -12.3% | 18.0 | n/p | 72% | 14% | 5% | 1% |
| TNQ | 898,000 | 4.5% | 6,751,000 | 3.5% | 7.5 | -0.1 | 93% | 4% | 2% | 34% |
| **Total International** | **2,619,000** | **5.6%** | **53,912,000** | **3.7%** | **20.6** | **-0.4** | **70%** | **24%** | **6%** | **-** |

**Notes/Sources:**

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 ASGS (Australian Statistical Geographic Standard). SA2's (Statistical Area 2) 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.