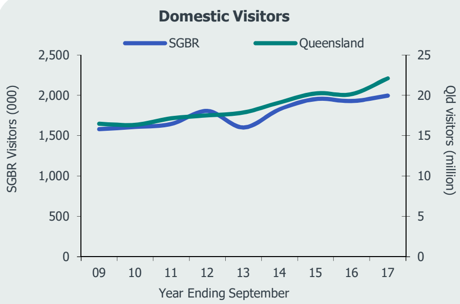
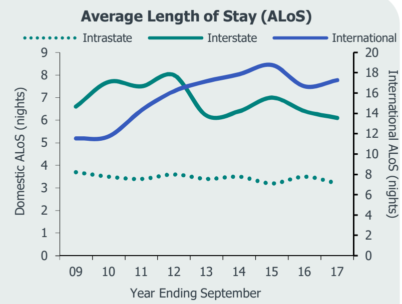
Southern Great Barrier Reef Regional Snapshot

Year Ending September 2017

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	**1,997,000**	**672,000**	**595,000**	**510,000**	**$1,070.8m**
Annual % change[1]	▲ 3.5%	▲ 13.5%	● -0.1%	▼ -13.9%	▲ 2.4%
3yr trend % change[2]	▲ 3.0%	▲ 5.0%	● -0.2%	▲ 0.7%	▲ 4.5%
International Overnight	**157,000**	**120,000**	**19,000**	**11,000**	**$92.7m**
Annual % change	▲ 18.3%	▲ 16.1%	▲ 2.8%	▲ 128.1%	▼ -8.4%
3yr trend % change	▲ 7.7%	▲ 8.6%	▲ 1.9%	▲ 42.8%	▲ 4.5%
TOTAL	**2,154,000**	**792,000**	**614,000**	**521,000**	**$1,163.5m**
Annual % change	▲ 4.5%	▲ 13.9%	● 0.0%	▼ -12.7%	▲ 1.5%
3yr trend % change	▲ 3.3%	▲ 5.5%	● -0.1%	▲ 1.1%	▲ 4.5%





Domestic Visitors

▪ In the year ending September 2017, domestic overnight visitation to the Southern Great Barrier Reef (SGBR) region grew by 3.5% to a record 2.0m visitors. Domestic visitation is vital to the region, accounting for 93% of overnight travel and 92% of overnight expenditure.

▪ Growth in holiday travel, up by 13.5% to 672,000 visitors, outweighed a 13.9% decline in business travel to 510,000. Visiting friends and relatives (VFR) travel was stable (-0.1%) at 595,000 visitors.

▪ The intrastate market accounts for nearly nine in ten (87%) domestic visitors, with visitation growing 4.7% to 1.7m visitors. Intra-regional overnight visitors from within SGBR were the primary driver of this growth and it remains the region's largest intrastate market.

▪ On the other hand, interstate visitation declined by 4.1% to 253,000. While interstate visitation was down overall, interstate holiday travel recorded strong growth of 32.9% to 117,000.

▪ Overall visitor nights declined by 5.3%, this was primarily driven by business visitors staying fewer nights on average (down by 1.3 nights year on year).

▪ The shorter average length of stay was mostly negated by visitor growth and a higher average spend per night (up by 8.1%). Hence, overnight expenditure grew 2.4% to $1.1bn.

International Visitors

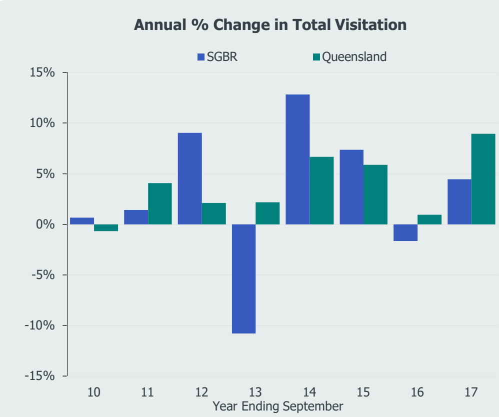
▪ International visitation to the SGBR region increased 18.3% to 157,000 visitors in the year ending September 2017. The international market accounted for 7% of overnight visitation and 8% of overnight expenditure in the region.

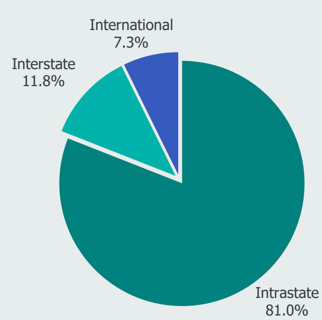
▪ Western markets dominated the region's top international source markets with the top four markets being the UK, Germany, New Zealand, and USA. Three of these recorded double-digit visitation growth: the UK increased 26.0% to 28,000 visitors, Germany was up by 36.3% to 26,000 visitors, and the US rose 24.4% to 13,000 visitors.

▪ Holiday visitation is the main reason for travel to the region, and grew by 16.1% year on year to 120,000 visitors. VFR and business travel also experienced growth.

▪ Visitor nights experienced strong growth of 22.7% to 2.7 million nights. However, the average length of stay (ALoS) softened among holiday and business travellers (down by 1.2 nights and 6.2 nights respectively), which may, in part, be due to the impact of cyclone Debbie interrupting tourism operators in the region.

▪ The lower ALoS among holiday and business travellers might have contributed to a 23.2% decline in average spend per visitor (now $537 per visitor). This resulted in a decline in total international visitor expenditure, down by 8.4% to $92.7m in the year ending September 2017.





In late March 2017, Cyclone Debbie and subsequent flooding interrupted tourism operations in several tourism regions, including SGBR.

Research Updates

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

Domestic visitation Year Ending September 2017

Domestic Visitors to SGBR

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	672,000	13.5%	2,468,000	6.8%	3.7	-0.2
VFR	595,000	-0.1%	2,040,000	1.5%	3.4	0.0
Business	510,000	-13.9%	1,739,000	-37.1%	3.4	-1.3
Domestic[3]	**1,997,000**	3.5%	**7,172,000**	-5.3%	**3.6**	-0.3
Intrastate						
Holiday	555,000	10.1%	1,746,000	5.6%	3.1	-0.2
VFR	527,000	0.3%	1,561,000	-0.1%	3.0	0.0
Business	473,000	-5.5%	1,613,000	-27.6%	3.4	-1.0
Intrastate	**1,744,000**	4.7%	**5,623,000**	-4.2%	**3.2**	-0.3
Interstate						
Holiday	117,000	32.9%	721,000	9.8%	6.2	-1.3
VFR	69,000	-2.6%	480,000	7.0%	7.0	0.6
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	**253,000**	-4.1%	**1,550,000**	-8.9%	**6.1**	-0.3

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
SGBR	2,660,000	5.6%	$391.2m	1.9%
Queensland	41,295,000	1.0%	$4,363.8m	1.2%
Australia	**191,961,000**	**1.9%**	**$20,420.1m**	**6.3%**

Key domestic source markets to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	446,000	-10.3%	2,004,000	10.2%
Regional Qld	1,298,000	11.1%	3,618,000	-10.7%
Sydney	n/p	n/p	n/p	n/p
Regional NSW	98,000	40.5%	492,000	20.8%
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	22,110,000	9.7%	85,982,000	8.3%
NSW	31,030,000	7.6%	99,591,000	7.1%
Victoria	23,750,000	10.6%	68,407,000	8.7%
Australia	**95,976,000**	**7.2%**	**347,274,000**	**5.9%**

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,397,000	1.6%	37,052,000	0.5%
NSW	12,229,000	3.4%	41,941,000	-0.3%
Victoria	10,146,000	5.5%	30,609,000	3.8%
Australia	**38,284,000**	**3.3%**	**145,635,000**	**0.6%**

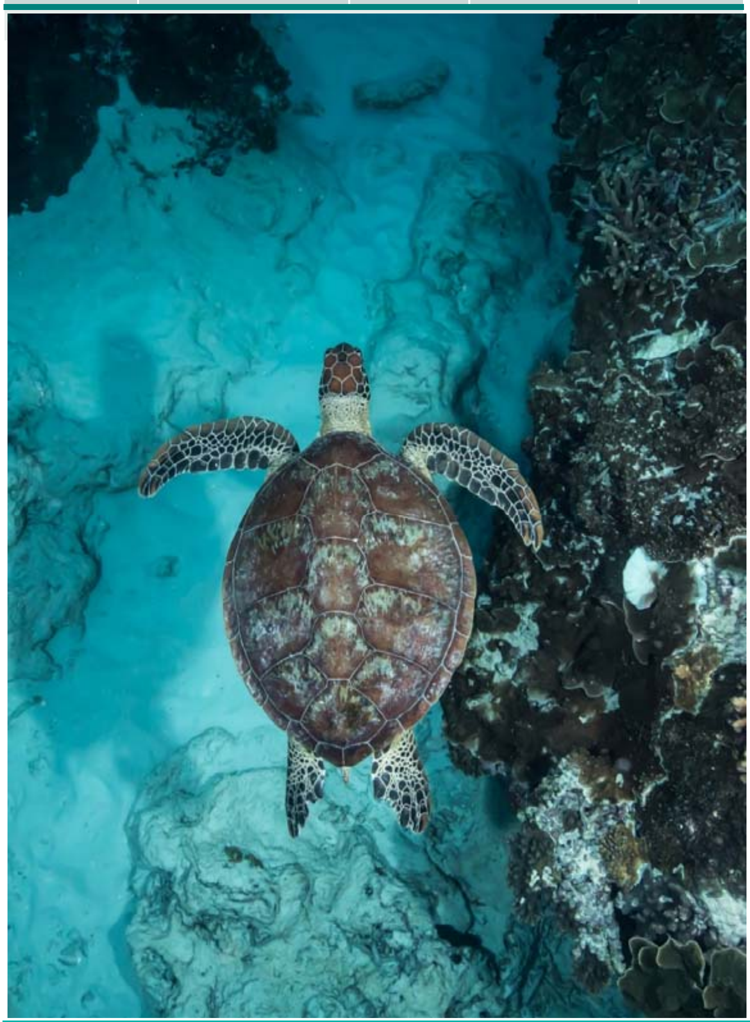
International visitation Year Ending September 2017

International Visitors to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	120,000	16.1%	1,078,000	2.8%	9.0	-1.2
VFR	19,000	2.8%	564,000	26.2%	29.7	5.5
Business	11,000	128.1%	130,000	47.3%	11.4	-6.2
Total[3]	**157,000**	**18.3%**	**2,711,000**	**22.7%**	**17.3**	**0.6**

State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,628,000	3.0%	53,596,000	1.0%
NSW	4,095,000	8.9%	94,938,000	9.0%
Victoria	2,815,000	7.0%	66,860,000	11.6%
Australia	**7,871,000**	**7.1%**	**267,014,000**	**6.6%**
Holiday Visitors	**Visitors**	**Year % Chg**	**Nights**	**Annual % Change**
Queensland	1,831,000	2.9%	23,084,000	1.6%
NSW	2,399,000	8.1%	28,170,000	5.6%
Victoria	1,537,000	5.4%	17,305,000	16.7%
Total	**4,421,000**	**6.7%**	**84,298,000**	**4.8%**



Top 5 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
UK	28,000	26.0%	247,000	2.0%
Germany	26,000	36.3%	165,000	-12.3%
NZ	14,000	-8.6%	183,000	-13.9%
USA	13,000	24.4%	172,000	n/p
France	8,000	40.8%	42,000	n/p

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	25,000	35.3%	185,000	71.6%
Germany	25,000	33.9%	145,000	-8.9%
USA	9,000	2.9%	53,000	n/p
France	8,000	52.0%	42,000	-30.2%
Netherlands	7,000	43.9%	22,000	-38.6%

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 September 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	6,711,000	15.4%	19,812,000	14.6%	3.0	0.0	25%	40%	26%	30%
Gold Coast	4,164,000	14.3%	14,761,000	9.8%	3.5	-0.2	53%	32%	12%	19%
Sunshine Coast	3,431,000	2.6%	12,283,000	1.5%	3.6	0.0	53%	35%	8%	16%
Fraser Coast*	595,000	1.1%	2,957,000	9.3%	5.0	n/p	49%	34%	13%	3%
Southern Qld Country	2,002,000	14.5%	5,910,000	33.4%	3.0	0.5	29%	38%	25%	9%
SGBR	**1,997,000**	**3.5%**	**7,172,000**	**-5.3%**	**3.6**	**-0.3**	**34%**	**30%**	**26%**	**9%**
Mackay*	908,000	8.4%	3,506,000	11.2%	3.9	n/p	17%	21%	53%	4%
Whitsundays*	472,000	-2.1%	2,303,000	3.1%	4.9	n/p	53%	17%	27%	2%
Townsville	1,045,000	-10.2%	3,434,000	-19.9%	3.3	-0.4	33%	24%	31%	5%
Outback*	859,000	9.5%	3,538,000	4.8%	4.1	n/p	28%	18%	45%	4%
TNQ	1,775,000	-2.8%	8,928,000	-2.4%	5.0	0.0	51%	21%	22%	8%
Total Domestic	**22,110,000**	**9.7%**	**85,982,000**	**8.3%**	**3.9**	**0.0**	**38%**	**34%**	**23%**	**-**

** 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	1,237,000	4.6%	25,731,000	4.0%	20.8	-0.1	54%	29%	9%	47%
Gold Coast	1,056,000	4.2%	9,760,000	-9.0%	9.2	-1.3	80%	15%	3%	40%
Sunshine Coast	294,000	8.2%	3,151,000	5.6%	10.7	-0.3	78%	18%	3%	11%
Fraser Coast	151,000	10.7%	736,000	12.0%	4.9	0.1	94%	6%	0%	6%
Southern Qld Country*	46,000	2.4%	1,372,000	0.3%	29.5	n/p	46%	36%	9%	2%
SGBR	**157,000**	**18.3%**	**2,711,000**	**22.7%**	**17.3**	**0.6**	**76%**	**12%**	**7%**	**6%**
Mackay*	50,000	3.5%	457,000	-13.8%	9.2	n/p	74%	17%	4%	2%
Whitsundays	247,000	8.2%	1,292,000	-14.6%	5.2	-1.4	96%	2%	1%	9%
Townsville	138,000	10.5%	1,367,000	-15.8%	9.9	-3.1	82%	11%	3%	5%
Outback*	27,000	-2.9%	576,000	-4.2%	21.3	n/p	72%	14%	6%	1%
TNQ	890,000	1.5%	6,433,000	-2.7%	7.2	-0.3	93%	4%	2%	34%
Total International	**2,628,000**	**3.0%**	**53,596,000**	**1.0%**	**20.4**	**-0.4**	**70%**	**24%**	**7%**	**-**

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.