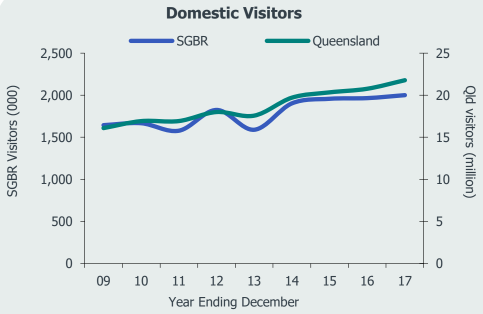
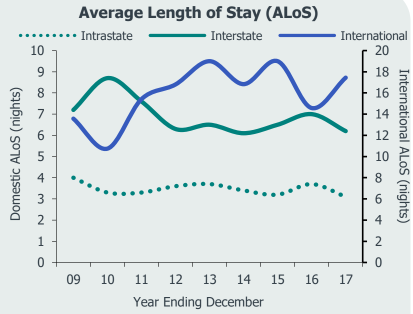
Southern Great Barrier Reef Regional Snapshot

Year Ending December 2017

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	**2,001,000**	**650,000**	**593,000**	**527,000**	**$1,050.2m**
Annual % change[1]	▲ 1.8%	▲ 5.6%	▼ -9.7%	▼ -3.3%	▼ -3.0%
3-yr trend % change[2]	▲ 1.7%	▲ 1.9%	▼ -1.9%	▲ 0.5%	▲ 3.5%
International Overnight	**151,000**	**118,000**	**19,000**	n/p	**$92.2m**
Annual % change	▲ 6.1%	▲ 5.3%	● 0.3%	n/p	▲ 2.3%
3-yr trend % change	▲ 4.7%	▲ 6.1%	▲ 3.0%	n/p	▲ 1.6%
TOTAL	**2,152,000**	**768,000**	**612,000**	**536,000**	**$1,142.4m**
Annual % change	▲ 2.1%	▲ 5.6%	▼ -9.4%	▼ -2.7%	▼ -2.6%
3-yr trend % change	▲ 1.9%	▲ 2.5%	▼ -1.8%	▲ 0.7%	▲ 3.4%





Domestic Visitors

▪ The Southern Great Barrier Reef (SGBR) region welcomed a record 2.0m visitors, up by 1.8%, in the year ending December 2017. Domestic visitors are crucial to the region, accounting for 93% of overnight travellers and 92% of overnight expenditure.

▪ Holidaymakers were a key growth driver, with a 5.6% increase to 650,000 visitors. The region saw particularly strong growth in interstate holiday visitation.

▪ Meanwhile, a decline in visiting friends and relatives (VFR) and business travel held overall growth back, with VFR travel down by 9.7% to 593,000 visitors and business down by 3.3% to 527,000 visitors.

▪ The intrastate market accounted for 1.7m visitors (stable year-on-year), or nearly nine in ten (86%) domestic visitors. Intra-regional overnight visitation from within SGBR continues to strengthen and remains the largest source of intrastate trips.

▪ The interstate market grew by 13.9% to 282,000 visitors, driven by a strong rise in holiday travel. Interstate holiday was up 38.4% to 121,000 visitors.

▪ However, visitor nights declined by 11.9%. This was primarily due to business visitors, who stayed fewer nights on average (down by 2.0 nights year-on-year). Holiday visitors also shortened their stays slightly (down by 0.2 of a night).

▪ The impact of the decline in visitor nights on visitor expenditure was somewhat offset by a higher average spend per night (up by 10.1%). The overall result was a 3.0% decline to $1.1bn in overnight expenditure.

International Visitors

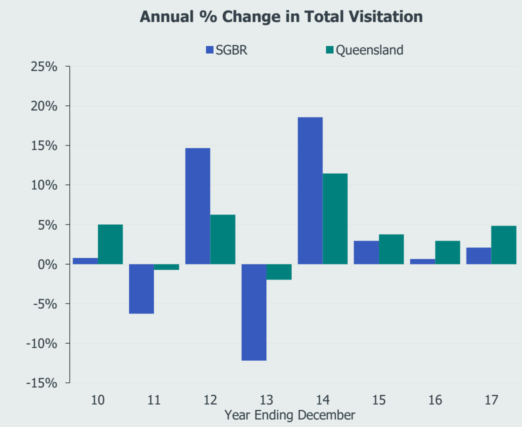
▪ International visitation to the SGBR region increased 6.1% to 151,000 visitors in the year ending December 2017. The international market accounted for 7% of overnight visitation and 8% of overnight expenditure in the region.

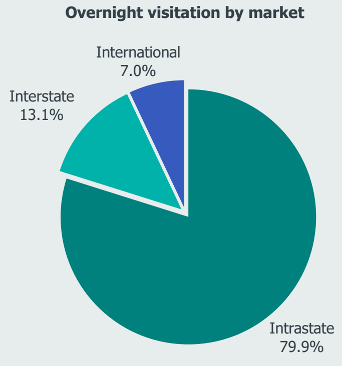
▪ Holidays are the main reason for travel to the region, accounting for 78% of international visitation. It contributed the most to annual growth (up 5.3% to 118,000 visitors).

▪ Western markets dominated the region's top international source markets with the top two markets of the UK and Germany driving growth. Visitation from the UK increased 8.2% to 29,000 while German visitation was up by 18.8% to 25,000 visitors.

▪ Visitor nights experienced strong growth of 26.9% to 2.6 million nights as VFR visitors extended their stays compared to last year. Holiday nights, however, remained stable at 1.1m nights.

▪ The extra nights from the traditionally lower-spending VFR market might have contributed to a 19.4% decrease in visitor spend per night. Hence, despite the strong growth in visitor nights, international visitor expenditure increased slightly, by 2.3% to $92.2m.





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

Southern Great Barrier Reef Regional Snapshot

Domestic visitation Year Ending December 2017

Domestic visitors to SGBR

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	650,000	5.6%	2,530,000	-0.1%	3.9	-0.2
VFR	593,000	-9.7%	2,070,000	-4.8%	3.5	0.2
Business	527,000	-3.3%	1,629,000	-41.9%	3.1	-2.0
Domestic[3]	**2,001,000**	1.8%	**7,099,000**	-11.9%	**3.5**	-0.6
Intrastate						
Holiday	529,000	0.2%	1,736,000	-4.1%	3.3	-0.1
VFR	522,000	-10.2%	1,568,000	-6.8%	3.0	0.1
Business	477,000	-0.1%	1,440,000	-39.2%	3.0	-2.0
Intrastate	**1,718,000**	0.0%	**5,343,000**	-15.4%	**3.1**	-0.6
Interstate						
Holiday	121,000	38.4%	794,000	10.0%	6.6	-1.7
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
Interstate	**282,000**	13.9%	**1,757,000**	0.5%	**6.2**	-0.8

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
SGBR	2,911,000	17.4%	$426.6m	13.2%
Queensland	40,683,000	0.0%	$4,340.1m	-2.0%
Australia	**191,920,000**	**1.2%**	**$20,443.8m**	**3.4%**

Key domestic source markets to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	430,000	-17.1%	1,629,000	-28.5%
Regional Qld	1,289,000	7.4%	3,714,000	-8.0%
Sydney	n/p	n/p	n/p	n/p
Regional NSW	122,000	60.8%	646,000	50.3%
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	21,781,000	4.9%	86,528,000	4.3%
NSW	31,575,000	8.2%	100,104,000	5.2%
Victoria	24,458,000	11.5%	70,423,000	9.2%
Australia	**97,203,000**	**7.1%**	**350,911,000**	**4.8%**

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,542,000	3.5%	38,416,000	3.8%
NSW	12,466,000	5.1%	42,854,000	2.8%
Victoria	10,592,000	9.9%	31,976,000	7.3%
Australia	**39,295,000**	**6.0%**	**150,289,000**	**3.6%**

Southern Great Barrier Reef Regional Snapshot

International visitation Year Ending December 2017

International visitors to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	118,000	5.3%	1,109,000	0.4%	9.4	-0.5
VFR	19,000	0.3%	585,000	74.2%	30.9	13.1
Business	9,000	50.0%	84,000	-18.4%	9.4	-7.9
Total[3]	**151,000**	**6.1%**	**2,632,000**	**26.9%**	**17.4**	**2.9**

Top 5 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
UK	29,000	8.2%	278,000	15.2%
Germany	25,000	18.8%	190,000	41.3%
NZ	14,000	-18.7%	148,000	-39.8%
USA	10,000	-15.6%	186,000	n/p
Netherlands	7,000	31.6%	24,000	n/p

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

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,684,000	4.3%	53,089,000	2.4%
NSW	4,158,000	7.4%	94,407,000	7.9%
Victoria	2,891,000	8.1%	66,238,000	5.2%
Australia	**7,999,000**	**6.2%**	**264,673,000**	**4.9%**
Holiday Visitors	**Visitors**	**Year % Chg**	**Nights**	**Annual % Change**
Queensland	1,879,000	4.4%	23,706,000	5.5%
NSW	2,447,000	7.7%	28,553,000	7.4%
Victoria	1,546,000	5.3%	16,622,000	6.6%
Total	**4,447,000**	**5.0%**	**83,978,000**	**4.2%**

Top 5 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
UK	24,000	2.4%	196,000	20.5%
Germany	24,000	18.5%	155,000	27.3%
USA	n/p	n/p	n/p	n/p
Netherlands	7,000	29.7%	22,000	-42.8%
France	7,000	-3.8%	38,000	-46.4%

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 December 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	6,485,000	7.7%	19,628,000	7.1%	3.0	0.0	27%	39%	26%	30%
Gold Coast	4,005,000	8.1%	14,510,000	8.1%	3.6	0.0	53%	32%	11%	18%
Sunshine Coast	3,391,000	0.0%	12,300,000	-0.3%	3.6	0.0	54%	35%	7%	16%
Fraser Coast*	675,000	4.5%	2,939,000	6.8%	4.4	n/p	53%	34%	10%	3%
Southern Qld Country	1,956,000	4.6%	5,532,000	-2.0%	2.8	-0.2	30%	38%	24%	9%
SGBR	**2,001,000**	**1.8%**	**7,099,000**	**-11.9%**	**3.5**	**-0.6**	**32%**	**30%**	**26%**	**9%**
Mackay*	827,000	2.1%	3,843,000	11.0%	4.6	n/p	19%	20%	52%	4%
Whitsundays*	545,000	5.3%	2,520,000	5.1%	4.6	n/p	54%	16%	26%	3%
Townsville	1,074,000	-7.7%	3,599,000	-13.4%	3.3	-0.3	32%	25%	31%	5%
Outback*	878,000	9.7%	3,906,000	9.2%	4.4	n/p	29%	19%	42%	4%
TNQ	1,819,000	-4.2%	9,120,000	-2.3%	5.0	0.1	52%	22%	20%	8%
Total Domestic	**21,781,000**	**4.9%**	**86,528,000**	**4.3%**	**4.0**	**0.0**	**39%**	**34%**	**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	1,274,000	6.7%	25,683,000	5.0%	20.2	-0.3	55%	28%	9%	47%
Gold Coast	1,069,000	4.1%	9,691,000	0.2%	9.1	-0.3	80%	15%	3%	40%
Sunshine Coast	301,000	3.4%	3,068,000	7.2%	10.2	0.4	78%	19%	3%	11%
Fraser Coast	150,000	1.9%	705,000	-10.6%	4.7	-0.7	92%	7%	0%	6%
Southern Qld Country*	48,000	2.9%	1,332,000	-0.4%	28.0	n/p	45%	38%	11%	2%
SGBR	**151,000**	**6.1%**	**2,632,000**	**26.9%**	**17.4**	**2.9**	**78%**	**13%**	**6%**	**6%**
Mackay*	50,000	3.9%	411,000	-11.5%	8.3	n/p	76%	15%	4%	2%
Whitsundays	241,000	-2.8%	1,256,000	-23.9%	5.2	-1.4	97%	2%	1%	9%
Townsville	147,000	14.3%	1,340,000	-17.5%	9.1	-3.5	81%	13%	3%	5%
Outback*	21,000	-10.5%	481,000	-12.8%	22.5	n/p	69%	15%	9%	1%
TNQ	897,000	-0.4%	6,468,000	-2.1%	7.2	-0.1	94%	4%	2%	33%
Total International	**2,684,000**	**4.3%**	**53,089,000**	**2.4%**	**19.8**	**-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 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.

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.