

Southern Great Barrier Reef Regional Snapshot

Year Ending March 2019



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	2,218,000	734,000	588,000	711,000	\$1,160.9m
Annual % change ¹	▲ 9.3%	▲ 7.2%	▼ -3.1%	▲ 23.6%	▲ 4.6%
3-yr trend % change ²	▲ 5.7%	▲ 5.4%	▼ -0.5%	▲ 12.2%	▲ 8.8%
International Overnight	140,000	109,000	20,000	n/p	\$107.1m
Annual % change	▼ -8.8%	▼ -7.2%	▼ -14.5%	n/p	▲ 31.2%
3-yr trend % change	▲ 0.6%	▲ 3.0%	▼ -3.2%	n/p	▼ -1.6%
TOTAL	2,358,000	843,000	608,000	n/p	\$1,268.0m
Annual % change	▲ 8.0%	▲ 5.1%	▼ -3.5%	n/p	▲ 6.4%
3-yr trend % change	▲ 5.4%	▲ 5.1%	▼ -0.6%	n/p	▲ 7.9%



Domestic Visitors

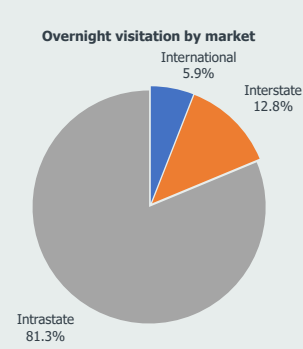
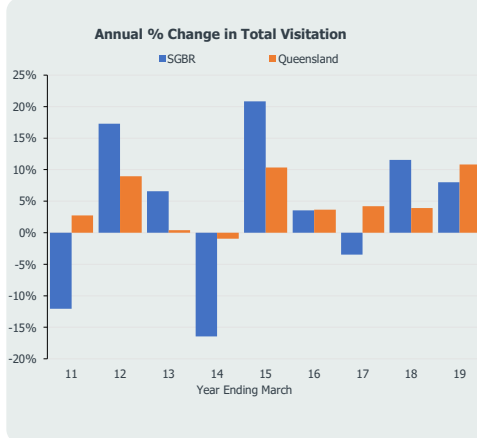
- The Southern Great Barrier Reef (SGBR) region welcomed a record 2.2 million domestic overnight visitors, up by 9.3%, in the year ending March 2019. Domestic visitors are crucial to the region, accounting for 94% of overnight travellers and 92% of overnight expenditure.
- Domestic overnight visitor expenditure grew by 4.6% to \$1.2bn. Spend per night was down by \$12 over the year to \$139 per night, while the average length of stay (ALoS) was up by 0.2 night over the year to 3.8 nights. Total nights grew by 13.9% to a record 8.3 million.
- Business visitors were the key source of growth for the region with overnight business visitation increasing by 23.6% to a record 711,000. Holiday visitation grew by 7.2% to 734,000, while visiting friends and relatives (VFR) travel decreased by 3.1% to 588,000.
- The intrastate market accounted for a record 1.9 million visitors (up by 9.5%), or 86% of domestic visitors to the region. Intra-regional overnight visitation is the largest intrastate source market, accounting for a third (33%) of intrastate visitors (638,000). Brisbane is the second largest market, accounting for more than a quarter (28.5%) of intrastate visitors (a record 546,000).
- The interstate market increased by 7.7% to 302,000 visitors. New South Wales accounts for more than half (52%) of the interstate market (157,000 visitors).

International Visitors

- There were 140,000 international visitors to the SGBR region in the year ending March 2019, a year on year decrease of 8.8%. The international market accounted for 6% of overnight visitation and 8% of overnight expenditure in the region.
- Overnight visitor expenditure in the region increased by 31.2% to \$107.1m. Expenditure grew while visitation declined due to a large increase in visitor spend per night (up \$30 to \$66 per night).
- Holidays are the main reason for international travel to the region, accounting for 78% of visitation. Holiday visitation decreased by 7.2% to 109,000 visitors. Meanwhile, VFR visitation decreased by 14.5% to 20,000.
- ALoS decreased by 3.3 nights to 11.7 nights, largely due to VFR visitors decreasing their average length of stay by 10.6 night to 15.7 nights. Total visitor nights decreased by 28.8% to 1.6 million nights.
- Western markets dominate the region's top international source markets, accounting for 83% of international visitation to the region. The top markets are the United Kingdom (24,000 visitors, down 14.7%), Germany (19,000 visitors, down 14.8%) and New Zealand (18,000 visitors, up 26.3%).

Accommodation

Demand growth for accommodation outpaced supply in the Southern Great Barrier Reef region in the year ending March 2019. As a result, accommodation average daily rate (ADR) was up by 1.6% and occupancy increased by 1.8% in the year ending March 2019 (Source STR).



New National Visitor Survey methodology, 2019

Tourism Research Australia has transitioned NVS sampling to 100% mobile phone interviews (from 50% mobile phone/50% landline) to reflect current phone usage trends. The change in methodology has seen a break in series, so please use with caution when comparing 2019 results with previous time periods.

Note that 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.

Research Updates

To receive an email alert whenever new tourism figures are released [click here](#)

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Domestic visitation Year Ending March 2019

Domestic visitors to SGBR

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	734,000	7.2%	3,235,000	13.4%	4.4	0.2
VFR	588,000	-3.1%	2,301,000	10.4%	3.9	0.5
Business	711,000	23.6%	2,330,000	21.1%	3.3	-0.1
Domestic³	2,218,000	9.3%	8,348,000	13.9%	3.8	0.2
Intrastate						
Holiday	575,000	4.3%	2,030,000	5.2%	3.5	0.0
VFR	503,000	-6.8%	1,522,000	-5.5%	3.0	0.0
Business	664,000	26.9%	2,142,000	45.9%	3.2	0.4
Intrastate	1,916,000	9.5%	6,142,000	14.3%	3.2	0.1
Interstate						
Holiday	159,000	19.4%	1,205,000	30.6%	7.6	0.7
VFR	85,000	n/p	779,000	n/p	9.1	n/p
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	302,000	7.7%	2,206,000	12.7%	7.3	0.3

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
SGBR	2,566,000	-0.8%	\$350.3m	-2.6%
Queensland	46,689,000	12.7%	\$5,218.m	14.9%
Australia	218,369,000	11.0%	\$23,522.9m	12.4%

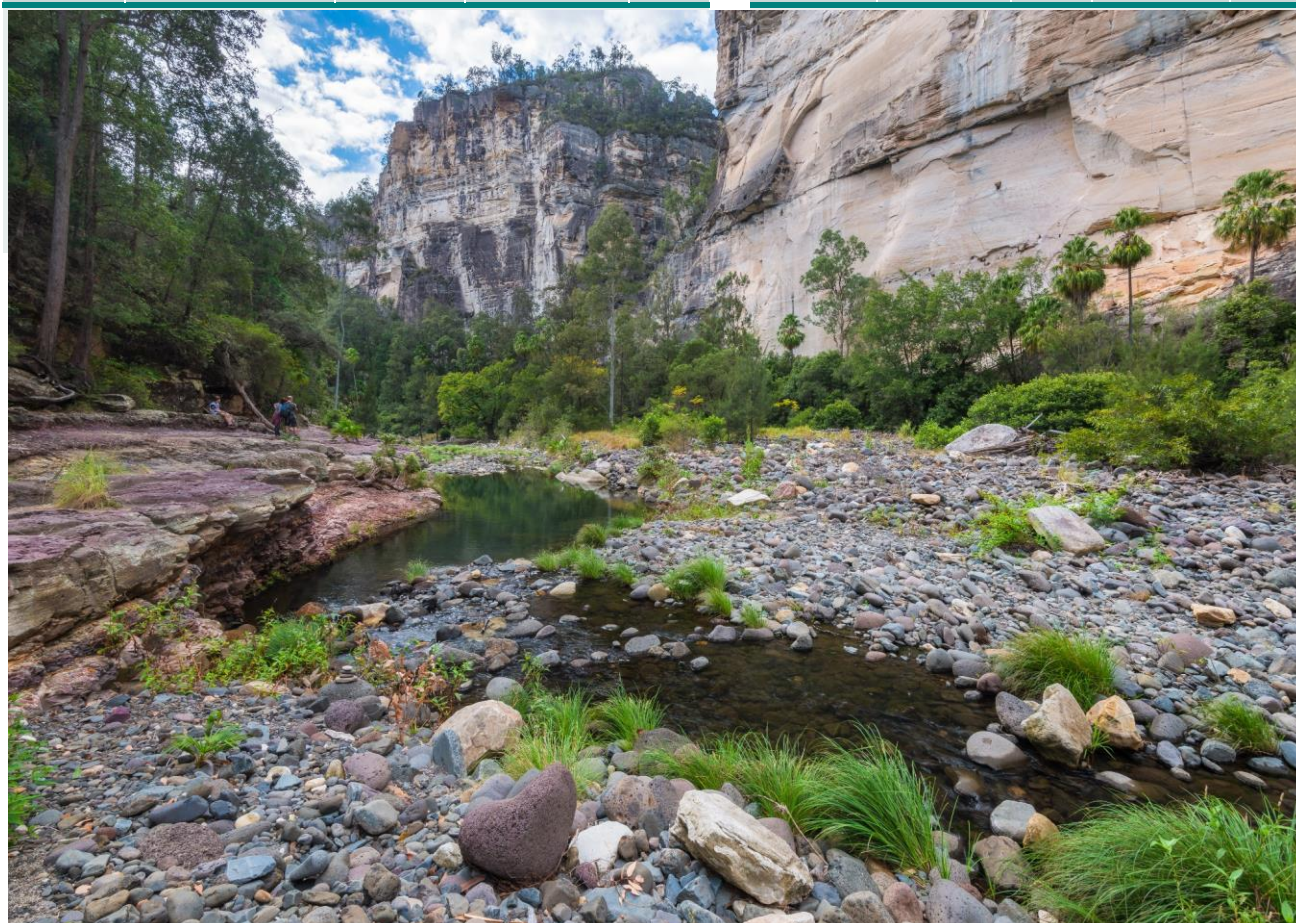
Key domestic source markets to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	546,000	22.5%	2,148,000	35.6%
Regional Qld	1,370,000	5.1%	3,994,000	5.5%
Sydney	n/p	n/p	n/p	n/p
Regional NSW	87,000	-29.8%	558,000	-15.3%
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	24,584,000	12.2%	97,052,000	11.6%
NSW	35,606,000	7.9%	111,371,000	8.3%
Victoria	27,832,000	11.8%	78,965,000	12.6%
Australia	109,051,000	10.1%	386,162,000	9.8%

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,530,000	9.6%	42,266,000	7.5%
NSW	14,056,000	6.9%	47,962,000	6.9%
Victoria	11,693,000	9.2%	33,453,000	5.5%
Australia	43,708,000	9.8%	164,362,000	7.2%



Southern Great Barrier Reef Regional Snapshot

International visitation Year Ending March 2019

International visitors to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	109,000	-7.2%	940,000	-8.7%	8.6	-0.1
VFR	20,000	-14.5%	310,000	-49.0%	15.7	-10.6
Business	n/p	n/p	n/p	n/p	n/p	n/p
Total³	140,000	-8.8%	1,632,000	-28.8%	11.7	-3.3

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,738,000	-0.3%	54,366,000	1.4%
NSW	4,346,000	0.3%	97,418,000	3.2%
Victoria	3,088,000	5.0%	71,690,000	5.6%
Australia	8,534,000	2.7%	270,672,000	0.8%

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,848,000	-1.1%	22,710,000	-1.2%
NSW	2,451,000	-0.7%	28,451,000	2.4%
Victoria	1,648,000	7.5%	16,982,000	5.2%
Total	4,629,000	3.5%	82,959,000	1.5%



Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
United Kingdom	24,000	-14.7%	159,000	-31.4%
Germany	19,000	-14.8%	123,000	-48.4%
New Zealand	18,000	26.3%	125,000	-21.1%
USA	11,000	1.0%	66,000	-8.8%
Netherlands	7,000	14.4%	27,000	18.5%
France	7,000	5.7%	64,000	95.2%
Scandinavia	n/p	n/p	n/p	n/p
Switzerland	n/p	n/p	n/p	n/p
Canada	n/p	n/p	n/p	n/p
Italy	n/p	n/p	n/p	n/p

Due to sampling, some data may not be publishable (n/p), however the markets will still appear in order.

Top 10 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
United Kingdom	20,000	-14.8%	107,000	-32.5%
Germany	19,000	-13.3%	81,000	-60.4%
New Zealand	n/p	n/p	n/p	n/p
USA	9,000	n/p	n/p	n/p
Netherlands	7,000	14.2%	23,000	9.5%
France	7,000	2.7%	56,000	82.1%
Scandinavia	n/p	n/p	n/p	n/p
Switzerland	n/p	n/p	n/p	n/p
Canada	n/p	n/p	n/p	n/p
Italy	n/p	n/p	n/p	n/p

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.

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>

Disclaimer:
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Regional Comparison



Year Ending March 2019

Domestic regional comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	% Proportion of Travel Purpose			% Share of Total Visitors
							Holiday %	VFR %	Business %	
Brisbane	7,625,000	9.9%	22,030,000	4.3%	2.9	-0.2	28%	38%	25%	31%
Gold Coast	4,002,000	16.8%	15,785,000	22.4%	3.9	0.2	53%	29%	14%	16%
TNQ	2,019,000	5.2%	10,744,000	17.8%	5.3	0.6	50%	25%	22%	8%
Sunshine Coast	3,855,000	15.0%	13,431,000	11.7%	3.5	-0.1	55%	34%	9%	16%
SGBR	2,218,000	9.3%	8,348,000	13.9%	3.8	0.2	33%	27%	32%	9%
SQC	2,192,000	8.9%	5,979,000	5.9%	2.7	-0.1	26%	41%	25%	9%
Townsville	1,427,000	31.9%	4,878,000	35.6%	3.4	0.1	34%	29%	29%	6%
Outback*	965,000	7.5%	5,151,000	16.3%	5.3	n/p	33%	18%	46%	4%
Whitsundays*	646,000	10.2%	3,112,000	14.5%	4.8	n/p	63%	16%	21%	3%
Fraser Coast*	739,000	6.8%	2,905,000	7.9%	3.9	n/p	53%	34%	8%	3%
Mackay*	1,002,000	7.0%	3,997,000	12.9%	4.0	n/p	22%	21%	52%	4%
Total Queensland	24,584,000	12.2%	97,052,000	11.6%	3.9	0.0	39%	33%	24%	100%

* 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			% Share of Total Visitors
							Holiday %	VFR %	Business %	
Brisbane	1,411,000	4.5%	27,579,000	2.6%	19.5	-0.3	52%	31%	9%	52%
Gold Coast	1,027,000	-2.1%	9,744,000	-0.6%	9.5	0.1	78%	15%	4%	38%
TNQ	849,000	-3.1%	6,648,000	7.5%	7.8	0.8	92%	5%	2%	31%
Sunshine Coast	309,000	0.9%	2,885,000	-3.1%	9.3	-0.4	76%	21%	2%	11%
SGBR	140,000	-8.8%	1,632,000	-28.8%	11.7	-3.3	78%	14%	4%	5%
SQC*	57,000	9.6%	1,578,000	0.9%	27.8	n/p	37%	32%	16%	2%
Townsville	132,000	-11.0%	1,486,000	20.2%	11.2	2.9	82%	14%	3%	5%
Outback*	28,000	-2.5%	459,000	-5.7%	16.3	n/p	70%	15%	5%	1%
Whitsundays	226,000	-6.3%	1,407,000	11.1%	6.2	1.0	97%	3%	0%	8%
Fraser Coast	128,000	-10.0%	571,000	-15.7%	4.5	-0.3	92%	7%	0%	5%
Mackay*	52,000	7.7%	361,000	-14.3%	6.9	n/p	74%	20%	5%	2%
Total Queensland	2,738,000	-0.3%	54,366,000	1.4%	19.9	0.3	67%	26%	8%	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.

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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

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.