

Southern Great Barrier Reef Regional Snapshot



Year Ending December 2018



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	2,176,000	755,000	534,000	719,000	\$1,182.1m
Annual % change ¹	▲ 13.6%	▲ 14.4%	▼ -8.1%	▲ 51.3%	▲ 19.1%
3-yr trend % change ²	▲ 5.4%	▲ 6.9%	▼ -2.8%	▲ 12.4%	▲ 9.4%
International Overnight	146,000	113,000	22,000	n/p	\$106.8m
Annual % change	▼ -2.1%	▼ -1.8%	▲ 10.8%	n/p	▲ 16.0%
3-yr trend % change	▲ 2.9%	▲ 5.0%	▲ 3.4%	n/p	▲ 1.2%
TOTAL	2,322,000	869,000	556,000	n/p	\$1,289.0m
Annual % change	▲ 12.5%	▲ 12.0%	▼ -7.4%	n/p	▲ 18.8%
3-yr trend % change	▲ 5.3%	▲ 6.6%	▼ -2.6%	n/p	▲ 8.6%



Domestic Visitors

The Southern Great Barrier Reef (SGBR) region welcomed a record 2.2m domestic overnight visitors, up by 13.6%, in the year ending December 2018. Domestic visitors are crucial to the region, accounting for 94% of overnight travellers and 92% of overnight expenditure.

Domestic overnight visitor expenditure grew strongly (up 19.1%) to \$1.2bn. Expenditure grew faster than visitation due to visitors increasing their average length of stay (ALoS) by 0.3 nights to 3.8m nights, which lead to total visitor nights growing by 22.8% to 8.3m. The increase in nights offset a 3.0% decrease in average spend per night over the year to \$143/night.

Business visitors were the key source of growth for the region with overnight business visitation increasing by 51.3% to a record 719,000. Holiday visitation grew strongly, up 14.4% to 755,000, while visiting friends and relatives (VFR) travel decreased by 8.1% to 534,000.

The intrastate market accounted for a record 1.9m visitors (up by 16.4%), or 88% of domestic visitors to the region. Intra-regional overnight visitation is the largest intrastate source market, accounting for more than a third (34%) of intrastate visitors (651,000). Brisbane is the second largest market, accounting for more than a quarter (27%) of intrastate visitors (515,000).

The interstate market declined by 2.6% to 271,000 visitors. New South Wales accounts for just under half (48%) of the interstate market (130,000 visitors).

International Visitors

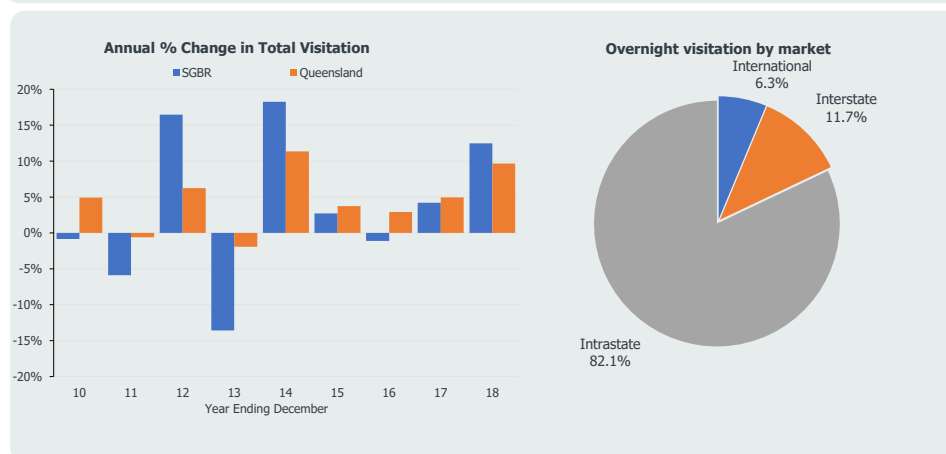
There were 146,000 international visitors to the SGBR region in the year ending December 2018, a year on year decrease of 2.1%. The international market accounted for 6% of overnight visitation and 8% of overnight expenditure in the region.

Overnight visitor expenditure in the region increased by 16.0% to \$106.8m. Expenditure grew while visitation declined due to a large increase in visitor spend per night (up 75.2% to \$62/night).

Holidays are the main reason for international travel to the region, accounting for 78% of visitation. Holiday visitation decreased by 1.8% to 113,000 visitors, however holiday visitors increased their stay slightly (up by 0.3 nights) to 9.3 nights, resulting in a 1.6% increase in total holiday nights. Meanwhile, VFR visitation grew by 10.8% to 22,000, with these visitors significantly decreasing their length of stay (down by 15.8 nights) to 14.1 nights on average.

These changes in length of stay resulted in visitor nights decreasing by more than visitation (down 33.8% to 1.7m nights), reflecting an overall 5.6 night decrease in ALoS to 11.7 nights.

Western markets dominate the region's top international source markets, accounting for 81% of international visitation to the region. The top markets are the United Kingdom (24,000 visitors, down 13.3%), Germany (20,000 visitors, down 16.4%) and New Zealand (20,000 visitors, up 46.9%).



Accommodation
Demand growth for commercial accommodation outpaced supply in the Southern Great Barrier Reef region in the year ending December 2018. As a result, accommodation average daily rate (ADR) was up by 2.4% and occupancy increased by 3.7% in the year ending December 2018 (source: STR).

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

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Domestic visitation Year Ending December 2018

Domestic visitors to SGBR						
	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	755,000	14.4%	3,352,000	26.6%	4.4	0.4
VFR	534,000	-8.1%	1,905,000	-5.8%	3.6	0.1
Business	719,000	51.3%	2,579,000	80.5%	3.6	0.6
Domestic³	2,176,000	13.6%	8,286,000	22.8%	3.8	0.3
Intrastate						
Holiday	609,000	16.9%	2,157,000	26.6%	3.5	0.3
VFR	464,000	-9.3%	1,367,000	-11.4%	2.9	-0.1
Business	682,000	60.0%	2,146,000	72.3%	3.1	0.2
Intrastate	1,905,000	16.4%	6,069,000	20.0%	3.2	0.1
Interstate						
Holiday	147,000	5.0%	1,195,000	26.6%	8.1	1.4
VFR	70,000	n/p	538,000	n/p	7.7	0.8
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	271,000	-2.6%	2,217,000	31.2%	8.2	2.1
Domestic day trip visitors						
Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg		
SGBR	2,596,000	-8.4%	\$346.4m	-16.4%		
Queensland	44,716,000	9.9%	\$5,208.8m	20.0%		
Australia	206,051,000	7.4%	\$22,526.1m	10.2%		

Key domestic source markets to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	515,000	23.0%	1,865,000	16.2%
Regional Qld	1,390,000	14.1%	4,204,000	21.7%
Sydney	n/p	n/p	n/p	n/p
Regional NSW	n/p	n/p	n/p	n/p
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	24,086,000	10.6%	94,732,000	9.5%
NSW	34,554,000	9.4%	107,413,000	7.3%
Victoria	25,687,000	5.0%	73,873,000	4.9%
Australia	105,600,000	8.6%	376,087,000	7.2%
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,426,000	9.8%	41,575,000	5.0%
NSW	13,648,000	9.0%	46,347,000	7.1%
Victoria	10,987,000	3.3%	32,481,000	0.6%
Australia	42,364,000	7.6%	160,059,000	3.6%



Southern Great Barrier Reef Regional Snapshot

International visitation Year Ending December 2018

International visitors to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	113,000	-1.8%	1,050,000	1.6%	9.3	0.3
VFR	22,000	10.8%	315,000	-47.9%	14.1	-15.8
Business	n/p	n/p	n/p	n/p	n/p	n/p
Total³	146,000	-2.1%	1,710,000	-33.8%	11.7	-5.6

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,763,000	2.3%	55,052,000	3.7%
NSW	4,370,000	3.0%	96,204,000	2.4%
Victoria	3,039,000	5.4%	72,872,000	11.2%
Australia	8,524,000	4.8%	273,793,000	3.8%

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,867,000	1.0%	22,708,000	-1.5%
NSW	2,479,000	3.3%	28,113,000	1.4%
Victoria	1,606,000	6.2%	16,697,000	3.8%
Total	4,623,000	5.8%	82,392,000	1.1%



Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
United Kingdom	24,000	-13.3%	172,000	-31.3%
Germany	20,000	-16.4%	203,000	12.2%
New Zealand	20,000	46.9%	147,000	-5.0%
USA	11,000	5.9%	66,000	-66.0%
France	7,000	1.8%	64,000	65.4%
Scandinavia	7,000	-3.3%	47,000	-47.6%
Netherlands	7,000	-6.5%	24,000	0.4%
China	n/p	n/p	n/p	n/p
Switzerland	5,000	7.0%	16,000	46.3%
Canada	n/p	n/p	n/p	n/p

For technical reasons, 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	-13.2%	107,000	-36.9%
Germany	20,000	-14.2%	155,000	8.2%
New Zealand	n/p	n/p	n/p	n/p
USA	9,000	n/p	n/p	n/p
Scandinavia	7,000	11.2%	47,000	92.8%
France	7,000	-1.1%	54,000	40.4%
Netherlands	6,000	-5.6%	20,000	-6.2%
Switzerland	5,000	-0.2%	15,000	39.1%
Canada	n/p	n/p	n/p	n/p
China	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>

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Regional Comparison

Year Ending December 2018

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	7,517,000	8.2%	21,883,000	5.8%	2.9	-0.1	29%	39%	24%	31%
Gold Coast	3,795,000	7.2%	14,664,000	9.0%	3.9	0.1	54%	28%	14%	16%
TNQ	2,065,000	13.5%	10,548,000	15.7%	5.1	0.1	51%	24%	21%	9%
Sunshine Coast	3,684,000	8.6%	12,896,000	4.8%	3.5	-0.1	54%	35%	9%	15%
SGBR	2,176,000	13.6%	8,286,000	22.8%	3.8	0.3	35%	25%	33%	9%
SQC	2,205,000	12.7%	5,893,000	6.5%	2.7	-0.2	27%	41%	24%	9%
Townsville	1,378,000	28.3%	4,797,000	33.3%	3.5	0.1	34%	30%	27%	6%
Outback *	884,000	3.1%	4,876,000	12.2%	5.5	n/p	35%	16%	45%	4%
Whitsundays *	651,000	11.8%	2,995,000	14.3%	4.6	n/p	62%	12%	25%	3%
Fraser Coast *	772,000	9.5%	3,135,000	11.7%	4.1	n/p	53%	33%	10%	3%
Mackay *	1,046,000	9.5%	4,133,000	13.4%	4.0	n/p	21%	21%	54%	4%
Total Queensland	24,086,000	10.6%	94,732,000	9.5%	3.9	0.0	39%	33%	23%	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	1,400,000	6.3%	28,718,000	9.7%	20.5	0.6	52%	31%	10%	51%
Gold Coast	1,047,000	1.2%	10,021,000	7.8%	9.6	0.6	78%	15%	4%	38%
TNQ	863,000	-2.7%	6,288,000	-1.6%	7.3	0.1	91%	6%	3%	31%
Sunshine Coast	311,000	3.6%	2,778,000	-9.6%	8.9	-1.3	76%	22%	2%	11%
SGBR	146,000	-2.1%	1,710,000	-33.8%	11.7	-5.6	78%	15%	4%	5%
SQC *	56,000	7.7%	1,501,000	-3.0%	27.0	n/p	38%	33%	15%	2%
Townsville	136,000	-6.9%	1,264,000	-6.2%	9.3	0.1	85%	13%	2%	5%
Outback *	29,000	-0.2%	541,000	2.3%	18.5	n/p	71%	16%	6%	1%
Whitsundays	234,000	-1.1%	1,294,000	5.6%	5.5	0.4	96%	3%	0%	8%
Fraser Coast	130,000	-12.7%	510,000	-26.7%	3.9	-0.8	93%	6%	1%	5%
Mackay *	56,000	10.5%	418,000	-14.5%	7.4	n/p	77%	20%	4%	2%
Total Queensland	2,763,000	2.3%	55,052,000	3.7%	19.9	0.3	68%	26%	8%	100%

Notes/Sources:

This release of year ending December 2018 data includes purpose-of-visit information and revisions to IVS estimates from 2005 to 2018. Please note results have been revised back to 2005 and are not to be used or compared to previously published data

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.