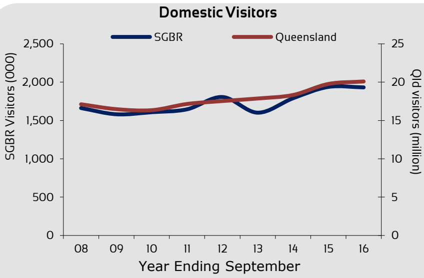
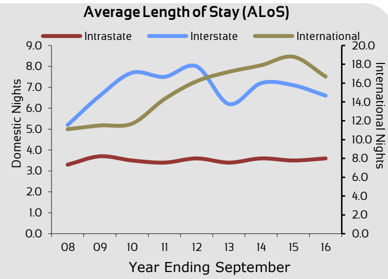
SGBR Regional Snapshot

Tourism and Events Queensland

Year Ending September 2016

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	1,932,000	585,000	583,000	627,000	$1,022.02
Annual % change[1]	● -0.3%	▲ 2.6%	▼ -3.6%	▼ -3.2%	▲ 7.2%
Trend % change[2]	▲ 6.2%	▲ 3.9%	▼ -0.7%	▲ 14.8%	▲ 0.5%
International Overnight	133,000	103,000	18,000	n/p	n/p
Annual % change	▼ -6.3%	▼ -3.9%	▲ 4.4%	▲ n/p	n/p
Trend % change	▲ 0.9%	▲ 1.5%	▲ 2.8%	▲ n/p	n/p
TOTAL	**2,065,000**	**688,000**	**601,000**	**n/p**	**n/p**
Annual change	▼ -0.7%	▲ 1.6%	▼ -3.4%	n/p	n/p





Domestic Visitation

▪ Domestic overnight visitation to the Southern Great Barrier Reef (SGBR) region was stable in the year ending September 2016 (-0.3% change to 1.9 million visitors). Domestic travel to the region represents 93.6% of total overnight visitation, with the majority of these visitors being Queensland residents.

▪ Intrastate travel to SGBR was relatively stable (-0.6%) at 1.7 million in the year ending September 2016. Holiday travel was stable (-0.2%), while visiting friends and relatives (VFR) increased by 1.8%, but business declined by 8.1%.

▪ The largest source market for SGBR was Brisbane, which grew by 30.5%, reaching 514,000 visitors. SGBR also saw strong growth from the Gold Coast (up 63.8%) and Fraser Coast (up 31.0%), while travel from the Sunshine Coast, travel within the SGBR region, and from Mackay was down year on year.

▪ Interstate travel to SGBR grew by 1.2% year on year to 262,000 visitors, with interstate holiday travel up 20.3%. VFR was down year on year (down 29.8%), resulting in the slight overall growth in interstate travel.

▪ Domestic overnight visitor expenditure to the SGBR region increased by 7.2% to reach a record high $1.02 billion. This was driven by the growth in interstate holiday visitation.

▪ The average length of stay (ALoS) of domestic travellers to the SGBR was 4.0 nights in the year ending September 2016. Interstate travellers stay longer in SGBR, spending on average 6.6 nights in the region, while intrastate travellers spend 3.6 nights on average.

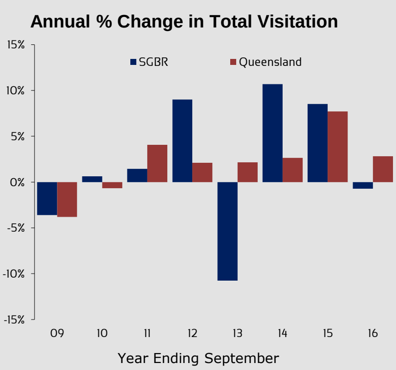
International Visitation

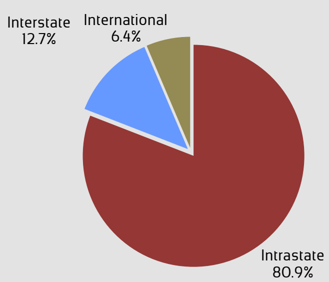
▪ International visitation to SGBR decreased by 6.3% in the year ending September 2016, driven by a significant reduction in international employment visitors, in line with the slowing of coal seam gas (CSG) investment. Holiday travel also decreased (down 3.9%) while international VFR saw an increase of 4.4%.

▪ The regions top source market, the United Kingdom, was down 10% to 22,000 while New Zealand, the third biggest source market was down 23% to 16,000 visitors. Germany, the second largest market to SGBR by visitation, remained relatively stable, down 3% to 19,000.

▪ It should be noted that international travel to SGBR represented only 6.4% of total travel to the region, so any fluctuations in international visitation do not have a large impact on overall visitor numbers.

▪ The ALoS of international visitors to SGBR decreased by 2.1 nights to 16.7 nights, suggesting that international visitors who came to the region opted for slightly shorter stays. It should be noted that this result included education and employment visitors, which could inflate results significantly. As a comparison, the length of stay of international holidaymakers to the region was 10.2 nights. Sample size was not large enough to report international expenditure.





Research Updates

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

SGBR Regional Snapshot

Tourism and Events Queensland

Domestic visitation Year Ending September 2016

Domestic Visitors to SGBR

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	585,000	2.6%	2,302,000	-1.1%	3.9	-0.2
VFR	583,000	-3.6%	2,075,000	-10.3%	3.6	-0.2
Business	627,000	-3.2%	2,931,000	7.4%	4.7	0.5
Domestic[3]	**1,932,000**	-0.3%	**7,739,000**	-0.1%	**4.0**	0.0
Intrastate						
Holiday	496,000	-0.2%	1,638,000	-9.6%	3.3	-0.3
VFR	510,000	1.8%	1,589,000	0.6%	3.1	-0.1
Business	545,000	-8.1%	2,449,000	5.0%	4.5	0.6
Intrastate	**1,670,000**	-0.6%	**6,018,000**	1.8%	**3.6**	0.1
Interstate						
Holiday	n/p	▲	n/p	▲	n/p	▲
VFR	n/p	n/p	n/p	n/p	n/p	n/p
Business	n/p	▲	n/p	▲	n/p	▼
Interstate	**262,000**	1.2%	**1,721,000**	-6.4%	**6.6**	-0.5

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
SGBR	2,541,000	-9.1%	$369.7m	-16.8%
Queensland	40,526,000	10.5%	$4,330.8m	5.4%
Australia	**187,735,000**	**7.4%**	**$19,329.1m**	**1.5%**

On a national level, daytrip visitation increased 7.4% to 187.7 million visitors in the year ending September 2016. By comparison, daytrips in Queensland increased 10.5%, Victoria increased 7.4%, while New South Wales increased 3.7%.

Key domestic source markets to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	514,000	30.5%	1,918,000	7.5%
Regional Qld	1,157,000	-10.0%	4,100,000	-0.7%
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	20,091,000	1.6%	79,489,000	-1.5%
NSW	29,069,000	4.5%	94,129,000	4.4%
Victoria	21,671,000	2.3%	64,031,000	1.9%
Australia	**89,447,000**	**4.8%**	**330,074,000**	**3.7%**
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,128,000	7.7%	36,363,000	9.4%
NSW	11,850,000	8.0%	42,405,000	9.7%
Victoria	9,680,000	6.9%	29,824,000	6.5%
Australia	**36,871,000**	**8.2%**	**143,977,000**	**9.3%**

Total domestic overnight visitation continued to increase across all states in the year ending September 2016, which lead to national growth in domestic travel.

SGBR Regional Snapshot

Tourism and Events Queensland

International visitation Year Ending September 2016

International Visitors to SGBR

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	103,000	-3.9%	1,049,000	-14.1%	10.2	-1.2
VFR	18,000	4.4%	446,000	33.5%	24.1	5.2
Business	n/p	▲	n/p	▲	n/p	▲
Total[3]	**133,000**	**-6.3%**	**2,209,000**	**-16.8%**	**16.7**	**-2.1**

State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,551,000	13.1%	53,087,000	5.0%
NSW	3,760,000	12.6%	87,071,000	5.6%
Victoria	2,630,000	13.3%	59,927,000	3.9%
Australia	**7,348,000**	**11.7%**	**250,402,000**	**3.8%**

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,779,000	17.0%	22,720,000	10.0%
NSW	2,220,000	17.6%	26,687,000	9.5%
Victoria	1,458,000	20.7%	14,824,000	9.3%
Total	**4,142,000**	**18.1%**	**80,415,000**	**8.0%**

Top 10 international source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
UK	22,000	-10.0%	243,000	-35.5%
Germany	19,000	-3.1%	188,000	19.9%
NZ	16,000	-22.8%	212,000	-13.9%
USA	10,000	-11.3%	32,000	-91.9%
Canada	7,000	13.7%	50,000	-40.4%
France	6,000	-27.5%	129,000	3.3%
Scandinavia	6,000	-18.8%	45,000	-6.2%
Switzerland	6,000	21.4%	16,000	50.1%
Netherlands	n/p	▼	n/p	▼
China	n/p	▲	n/p	▲

These are the top 10 source markets for this period, ranked using total visitor numbers. Some markets may have been added to create natural groups such as 'Asia' and 'Europe' to provide a more complete picture. For technical reasons, some data may not be published, however the markets will still appear in order.

Holiday	Visitors	Year % Chg	Nights	Year % Chg
UK	19,000	-13.3%	108,000	-50.5%
Germany	19,000	-2.5%	159,000	22.8%
USA	9,000	29.2%	25,000	-30.5%
NZ	6,000	-24.6%	73,000	28.6%
Canada	6,000	13.6%	27,000	-38.1%
Switzerland	6,000	23.5%	16,000	48.7%
Scandinavia	5,000	-16.0%	38,000	-6.1%
France	5,000	-28.2%	60,000	-27.9%
Netherlands	n/p	▲	n/p	▲
China	n/p	n/p	n/p	n/p

The top 10 holiday visitor markets are similar to the total visitor markets above, however they are ranked using holiday visitor numbers. The same grouping and limitation of data applies.

The average length of stay of international holidaymakers in Queensland was 12.8 nights in the year ending September 2016. This result was more than both New South Wales (12.0 nights) and Victoria (10.2 nights). This represents a year on year decline of approximately 1 night in the average stay of international holiday travellers for Queensland, New South Wales and Victoria.

The Capricorn sub-region includes the Central Highlands, Emerald, Berserker, Bouldercombe, Emu Park, Frenchville - Mt Parker, Glenlee - Rockyview, Gracemere, Lakes Creek, Mt Morgan, Norman Gardens, Park Avenue, Parkhurst - Kawana, Greater Rockhampton Region, Shoalwater Bay, The Range - Allenstown and Yeppoon.

The Gladstone sub-region includes Agnes Water, Banana, Biloela, Boyne Island - Tannum Sands, Callemondah, Clinton - New Auckland, Gladstone, Gladstone Hinterland, Kon Kora - Sun Valley, South Trees, Telina - Toolooa and West Gladstone.

The Bundaberg sub-region includes Ashfield - Kepnock, Bargara - Burnett Heads, Branyan - Kensington, Greater Bundaberg Region, Millbank - Avoca, Svensson Heights - Norville, Walkervale - Avenell Heights, Gayndah - Munduberra, Gin Gin, Monto - Eidsvold and North Burnett.

Regional Comparison

Year Ending September 2016

Domestic Regional Comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
							% Proportion of Travel Purpose			
Brisbane	5,815,000	5.3%	17,388,000	-0.8%	3.0	-0.2	28%	40%	24%	29%
Gold Coast	3,660,000	3.8%	13,326,000	-1.5%	3.6	-0.2	53%	33%	10%	18%
Sunshine Coast	3,250,000	13.5%	11,757,000	7.7%	3.6	-0.2	59%	32%	6%	16%
Fraser Coast	597,000	-4.3%	2,271,000	-9.2%	3.8	-0.2	51%	38%	7%	3%
Southern Qld Country	1,912,000	-4.2%	5,151,000	-14.9%	2.7	-0.3	29%	39%	24%	10%
Southern GBR	**1,932,000**	**-0.3%**	**7,739,000**	**-0.1%**	**4.0**	**0.0**	**30%**	**30%**	**32%**	**10%**
Mackay	733,000	-16.8%	2,767,000	-12.4%	3.8	0.2	21%	22%	49%	4%
Whitsundays	516,000	25.5%	2,199,000	-1.3%	4.3	-1.1	65%	19%	10%	3%
Townsville	1,131,000	11.2%	4,201,000	4.2%	3.7	-0.3	31%	31%	25%	6%
Outback	519,000	n/p	2,321,000	n/p	4.5	n/p	44%	22%	27%	3%
TNQ	1,875,000	-7.3%	9,384,000	-4.4%	5.0	0.1	50%	22%	24%	9%
Total Domestic	**20,091,000**	**1.6%**	**79,489,000**	**-1.5%**	**4.0**	**-0.1**	**40%**	**34%**	**21%**	**-**

International Regional Comparison

Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
							% Proportion of Travel Purpose			
Brisbane	1,183,000	9.6%	24,735,000	4.2%	20.9	-1.1	53%	29%	9%	46%
Gold Coast	1,014,000	16.2%	10,722,000	26.7%	10.6	0.9	80%	14%	3%	40%
Sunshine Coast	272,000	6.4%	2,983,000	21.3%	11.0	1.4	79%	19%	2%	11%
Fraser Coast	136,000	3.8%	657,000	17.2%	4.8	0.5	93%	5%	1%	5%
Southern Qld Country	44,000	-13.0%	1,350,000	-17.7%	30.6	-1.8	43%	32%	10%	2%
Southern GBR	**133,000**	**-6.3%**	**2,209,000**	**-16.8%**	**16.7**	**-2.1**	**78%**	**14%**	**4%**	**5%**
Mackay	43,000	2.7%	461,000	-35.0%	10.7	-6.2	71%	15%	6%	2%
Whitsundays	229,000	9.6%	1,513,000	3.0%	6.6	-0.4	97%	1%	1%	9%
Townsville	125,000	2.1%	1,624,000	4.7%	13.0	0.3	77%	14%	4%	5%
Outback	20,000	n/p	217,000	n/p	10.6	n/p	78%	9%	10%	1%
TNQ	877,000	16.0%	6,613,000	-4.1%	7.5	-1.6	93%	4%	2%	34%
Total International	**2,551,000**	**13.1%**	**53,087,000**	**5.0%**	**20.8**	**-1.6**	**70%**	**23%**	**6%**	**-**

Notes/Sources:

In 2012, the 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 conducted by Tourism Research Australia. 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.

'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.
3. This figure includes "Other" visitors.