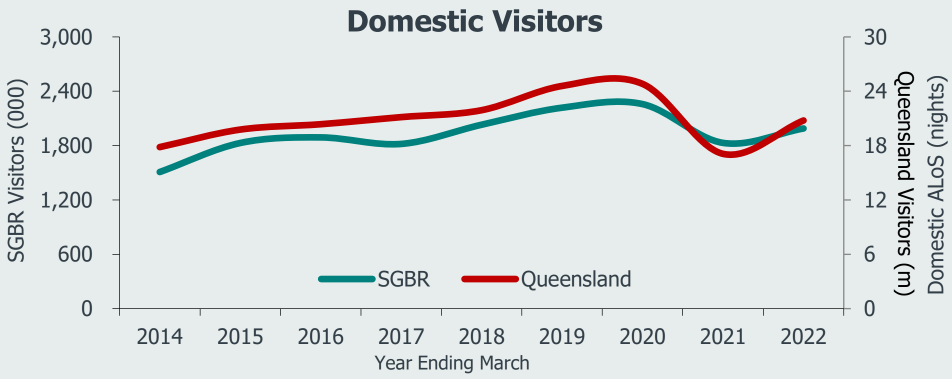
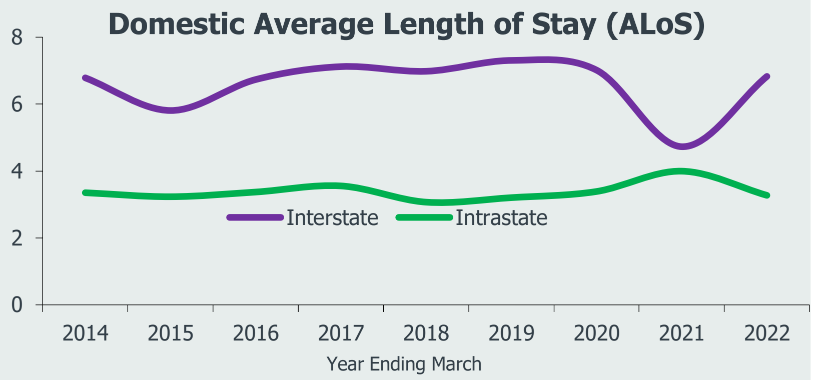
SGBR Regional Snapshot

Year Ending March 2022

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	**1,989,000**	**819,000**	**537,000**	**480,000**	**$1,259.1m**
Annual % change[1]	▲ 8.7%	▲ 24.1%	▲ 1.6%	▲ 2.5%	▲ 21.3%
3-yr trend % change[2]	▼ -3.6%	▲ 4.0%	▼ -2.9%	▼ -12.2%	▲ 2.9%
Change vs Dec 2019	▼ -14.1%	▲ 11.3%	▼ -22.6%	▼ -35.9%	▲ 5.1%
TOTAL OVERNIGHT	**1,994,000**	**822,000**	**538,000**	**480,000**	**$1,262.4m**
Annual % change	▲ 9.0%	▲ 24.6%	▲ 1.8%	▲ 2.5%	▲ 21.6%
3-yr trend % change	▼ -5.5%	▼ -0.9%	▼ -3.8%	▼ -12.5%	● -0.2%
Change vs Dec 2019	▼ -18.9%	▼ -2.6%	▼ -24.5%	▼ -36.4%	▼ -2.6%





Total Overnight Visitors

• To the year ending March 2022, total overnight visitor expenditure (OVE) decreased by 2.6 per cent to $1.3 billion compared with the pre-COVID-19 year ending December 2019. However, total OVE held up better than visitation which declined by 18.9 per cent to 2.0 million.

• Although international borders reopened in January 2022, the closure for most of the previous year meant that the domestic market accounted for essentially 100 per cent of visitation and OVE to the region. International results are not being reported on their own.

Domestic Visitors

The year ending March 2022 (i.e. 1 April 2021 – 31 March 2022) includes a full March quarter where Queensland's borders were open to all interstate travellers after borders were reopened to Victoria and New South Wales on 13 December 2022. For most of the September and December quarter 2021 borders were closed to Queensland's largest market (Victoria and New South Wales) and some Queensland regions experienced lockdowns.

Domestic change against Year Ending December 2019

• Domestic OVE increased by 5.1 per cent to $1.3 billion compared with 2019, largely due to higher visitor spend per night (up 34.2 per cent to $178 per night). The higher spend offset declines in visitor numbers (down 14.1 per cent to 2.0m) and the lower number of nights stayed (down 21.7 per cent to 7.1 million). Average length of stay decreased 0.3 nights to 3.6 nights.

• The decrease in visitation came largely from the business (down 35.9 per cent to 480,000) and Visiting Friends and Family (VFR) markets (down 22.6 per cent to 537,000), while holiday visitation was up 11.3 per cent to 819,000 visitors.

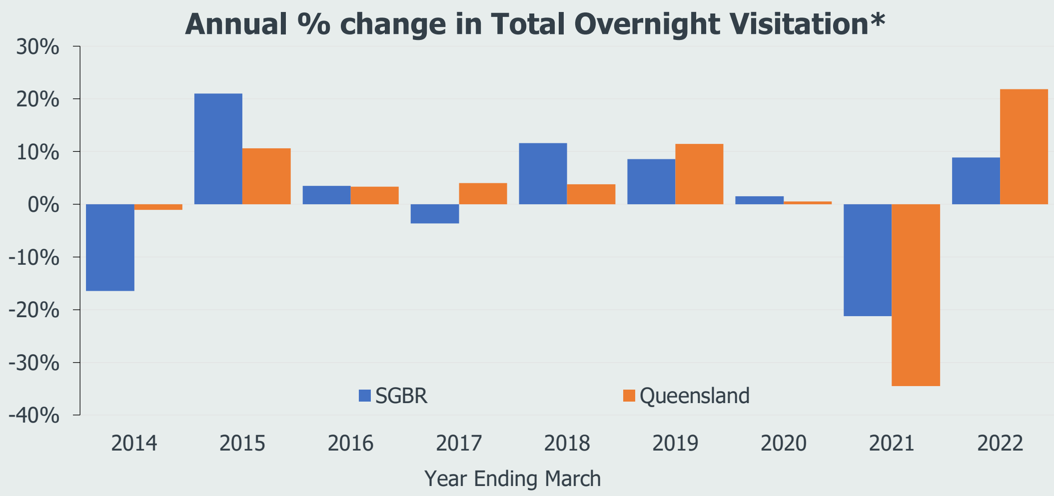
• Over the year the intrastate market held up better than interstate, reflecting the border closures at various times. Interstate visitation was down 44.9 per cent to 163,000. Total intrastate visitation was lower by 9.6 per cent to 1.8 million compared to 2019. This was driven by intraregional travel (down 31.3 per cent to 452,000). Visitation from the largest domestic market, Brisbane, was steady (up 0.1 per cent) at 632,000.

Domestic annual change

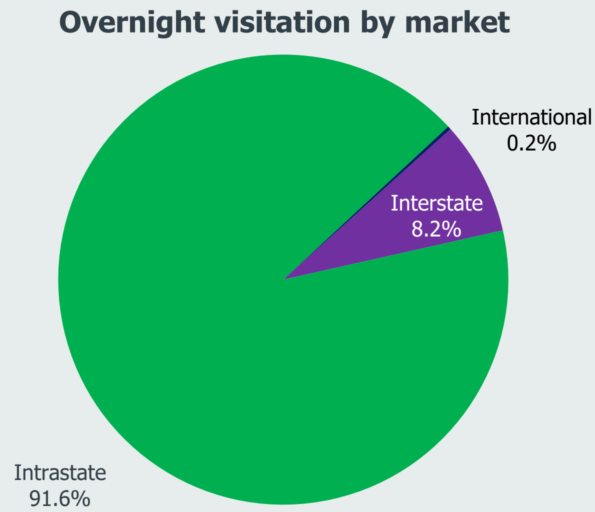
• Compared to the year ending March 2021, OVE increased 21.3 per cent, visitation increased by 8.7 per cent but nights were down by 4.0 per cent.

Domestic quarterly change

• Visitation in the March quarter 2022 was down 24.6 per cent and nights were down 29.6 per cent per cent compared to the March quarter 2019. SGBR's largest domestic market is Brisbane and with interstate borders reopening higher numbers of visitors from Brisbane could have opted to travel elsewhere. Intrastate travel was down 20.8 per cent and intrastate nights were down 18.9 per cent. Interstate visitation was not reportable due to small sample sizes.



*Shows change compared to the immediately prior year



Year Ending March 2022

Domestic overnight visitors to SGBR

	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019	Length of Stay	Year # Chg	Change vs YE Dec 2019
Holiday	819,000	24.1%	11.3%	3,332,000	43.4%	13.5%	4.1	0.5	0.1
VFR	537,000	1.6%	-22.6%	1,805,000	-17.7%	-35.2%	3.4	-0.8	-0.7
Business	480,000	2.5%	-35.9%	1,546,000	-30.3%	-48.1%	3.2	-1.5	-0.8
Domestic[3]	**1,989,000**	**8.7%**	**-14.1%**	**7,089,000**	**-4.0%**	**-21.7%**	**3.6**	**-0.5**	**-0.3**
Intrastate									
Holiday	750,000	16.7%	25.6%	2,811,000	23.7%	38.0%	3.7	0.2	0.3
VFR	477,000	3.5%	-21.6%	1,390,000	-25.1%	-28.6%	2.9	-1.1	-0.3
Business	459,000	1.0%	-33.5%	1,450,000	-32.0%	-45.0%	3.2	-1.5	-0.7
Intrastate	**1,827,000**	**5.7%**	**-9.6%**	**5,979,000**	**-13.4%**	**-13.3%**	**3.3**	**-0.7**	**-0.1**
Interstate									
Holiday	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p	n/p
VFR	n/p	n/p	n/p	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	n/p	n/p	n/p
Interstate	**163,000**	**59.2%**	**-44.9%**	**1,110,000**	**129.9%**	**-48.4%**	**6.8**	**2.1**	**-0.5**

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Change vs YE Dec 2019	Expenditure ($) million	Year % Chg	Change vs YE Dec 2019
SGBR	2,376,000	-15.2%	-18.5%	$422.0m	7.5%	-12.1%
Queensland	36,570,000	-6.5%	-30.8%	$4,350.7m	7.0%	-25.4%
Australia	**156,069,000**	**-1.5%**	**-37.2%**	**$18,719.0m**	**11.8%**	**-28.9%**

State comparison - Domestic Overnight

All Visitors	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019
Queensland	20,769,000	21.6%	-19.9%	84,968,000	23.5%	-17.5%
NSW	24,353,000	-2.3%	-37.5%	85,670,000	-1.0%	-30.1%
Victoria	18,157,000	36.0%	-39.0%	55,811,000	21.5%	-33.2%
Australia	**82,085,000**	**12.7%**	**-30.1%**	**318,264,000**	**13.2%**	**-23.8%**

Holiday Visitors	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019
Queensland	9,062,000	32.3%	-9.5%	41,199,000	47.6%	-5.0%
NSW	10,428,000	0.1%	-29.5%	38,270,000	1.8%	-24.4%
Victoria	8,571,000	42.9%	-31.2%	27,207,000	32.0%	-24.1%
Australia	**36,974,000**	**18.0%**	**-20.0%**	**147,852,000**	**24.4%**	**-14.6%**

March quarterly Data

	SGBR	Queensland
Overnight Visitors	412,000	5,432,000
Change over the year	-22.2%	5.7%
Change vs 2019	-24.6%	-9.6%
Nights	1,418,000	23,719,000
Change over the year	-26.6%	8.7%
Change vs 2019	-29.6%	0.4%


AGNES WATER, GLADSTONE

To stay up to date with the latest research updates, sign up to TEQ's industry newsletter, Eye on Q.

For tourism region definitions, click here


LADY MUSGRAVE ISLAND, BUNDABERG

Regional Comparison

Year Ending March 2022

Domestic regional comparison

Total Visitors	Visitors	Year % Chg	Change vs 2019	Nights	Year % Chg	Change vs 2019	Length of stay	Nights change	Change vs 2019	% Proportion of Travel Purpose: Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	5,214,000	12.6%	-36.2%	16,130,000	16.2%	-31.9%	3.1	0.1	0.2	31%	43%	18%	25%
Gold Coast	3,264,000	33.5%	-22.3%	12,075,000	50.0%	-27.1%	3.7	0.4	-0.2	57%	30%	10%	16%
TNQ	2,068,000	39.0%	-6.8%	10,772,000	47.8%	-3.7%	5.2	0.3	0.2	55%	19%	20%	10%
Sunshine Coast	3,708,000	18.2%	-8.4%	13,255,000	21.0%	-8.8%	3.6	0.1	0.0	58%	32%	5%	18%
SGBR	**1,989,000**	**8.7%**	**-14.1%**	**7,089,000**	**-4.0%**	**-21.7%**	**3.6**	**-0.5**	**-0.3**	**41%**	**27%**	**24%**	**10%**
SQC	2,118,000	19.4%	-5.0%	6,142,000	8.5%	4.1%	2.9	-0.3	0.3	35%	37%	21%	10%
Townsville North Queensland	1,152,000	57.5%	-11.2%	4,290,000	41.8%	-10.4%	3.7	-0.4	0.0	38%	30%	24%	6%
Outback Queensland *	868,000	1.5%	-24.6%	4,380,000	-0.4%	-28.2%	5.0	n/p	-0.3	33%	0%	44%	4%
Whitsundays*	844,000	59.7%	33.7%	3,750,000	70.3%	34.5%	4.4	n/p	0.0	69%	0%	17%	4%
Fraser Coast*	683,000	17.9%	-11.0%	2,558,000	30.7%	-16.6%	3.7	n/p	-0.3	49%	36%	0%	3%
Mackay*	1,128,000	29.1%	6.1%	4,317,000	14.2%	-1.5%	3.8	n/p	-0.3	22%	13%	55%	5%
Total Queensland	**20,769,000**	**21.6%**	**-19.9%**	**84,968,000**	**23.5%**	**-17.5%**	**4.1**	**0.1**	**0.1**	**44%**	**32%**	**19%**	**100%**

** Three-year trend change %*[2]

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.

Tourism Research Australia has transitioned NVS sampling to 100 per cent mobile phone interview (from 50 per cent mobile phone/50 per cent landline) to reflect current phone usage trends. The change in methodology has seen a break in series so please use caution when comparing 2019 to previous year's results.

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 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.