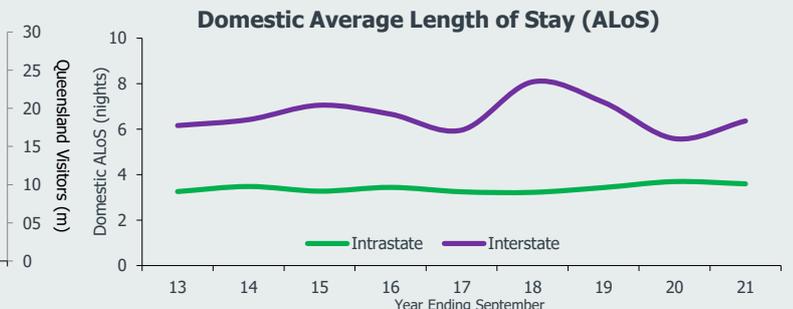


Year Ending September 2021



AGNES WATER, GLADSTONE

	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	2,111,000	848,000	595,000	518,000	\$1,279.4m
Annual % change ¹	▲ 16.8%	▲ 46.8%	▲ 14.8%	▼ -6.3%	▲ 39.4%
3-yr trend % change ²	▲ 0.7%	▲ 4.8%	▲ 2.7%	▼ -5.2%	▲ 3.5%
Change vs Dec 2019	▼ -8.9%	▲ 15.3%	▼ -14.1%	▼ -30.8%	▲ 6.8%
TOTAL OVERNIGHT	2,112,000	848,000	596,000	518,000	\$1,280.3m
Annual % change ¹	▲ 13.0%	▲ 35.5%	▲ 13.1%	▼ -6.6%	▲ 35.5%
3-yr trend % change ²	▼ -1.7%	▼ -0.9%	▲ 1.4%	▼ -5.5%	○ 0.2%
Change vs Dec 2019	▼ -14.1%	○ 0.4%	▼ -16.3%	▼ -31.4%	▼ -1.2%



Total Overnight Visitors

• In the year ending September 2021, the Southern Great Barrier Reef (SGBR) welcomed 2.1 million total overnight visitors (down 14.1 per cent compared to the benchmark pre-COVID-19 year ending December 2019) who spent \$1.3 billion (down 1.2 per cent compared to the year ending December 2019).

• Total overnight visitation includes international visitors as well as domestic. Due to Australia's borders being closed to most countries over the year (except for a New Zealand travel bubble during the June quarter 2021), international results are not being reported on their own.

Domestic Visitors

The year ending September 2021 (i.e. 1 October 2020 – 30 September 2021) reflects a year where international borders were closed and in the domestic market there were seven months (December 2020 to September 2021) where Queensland's borders were open to interstate travellers albeit with intermittent outbreaks causing border closures and lockdowns, prior to the Delta outbreaks. Since 23 September 2021 Queensland has had its borders closed to Greater Sydney; to all of New South Wales from 22 July and Victoria since 17 July 2021.

Domestic change against Year Ending December 2019

• In the year ending September 2021, Overnight Visitor Expenditure (OVE) grew by 6.8 per cent compared to 2019 to a record \$1.3 billion. This occurred despite both visitation (down 8.9 per cent to 2.1 million) and visitor nights (down 10.5 per cent to 8.1 million) decreasing over this period because the average spend per night grew by 19.4 per cent since 2019 to \$158 per night. The average length of stay was down 0.1 nights since 2019 to 3.8 nights.

• The increase in expenditure is the result of both an increase in expenditure on accommodation and food and drink. Commercial accommodation data provided by STR has shown the region had the largest increase in accommodation revenue across Queensland with both occupancy rates and average daily rates increasing.

• Holiday visitation reached a record 848,000 visitors, up by 15.3 per cent compared to the year ending December 2019. However, both business visitation (down 30.8 per cent to 518,000) and visiting friends and relatives visitation (down 14.1 per cent to 595,000) decreased.

• Intrastate visitation was down 4.7 per cent compared to the year ending December 2019 to 1.9 million, but intrastate holiday visitation was up by 30.7 per cent to a record 781,000. The share of visitors from intrastate has increased by 4.0 percentage points since 2019 to 91.0 per cent.

• SGBR welcomed a record number of visitors from both Brisbane (652,000, up 3.3 per cent compared to the year ending December 2019) and the Sunshine Coast (217,000, up 40.5 per cent compared to the year ending December 2019). On the other hand, intraregional visitation has decreased by 26.0 per cent since 2019 to 487,000.

• Interstate travel (down 37.2 per cent compared to the year ending December 2019 to 185,000) has seen sharp declines due to various restrictions put in place over the year, along with consumer preference to travel within their own state.

Domestic annual change

• Compared to the year ending September 2020, domestic overnight visitor expenditure increased 39.4 per cent, domestic visitation increased by 16.8 per cent and domestic nights increased by 16.5 per cent.

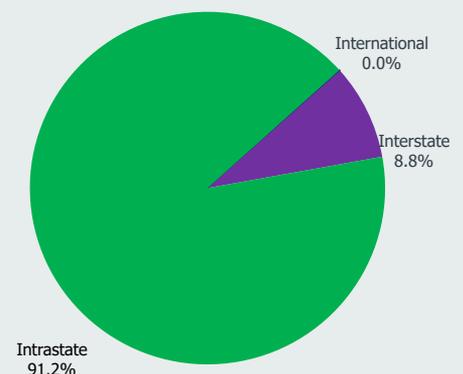
Domestic quarterly change

• Looking specifically at the September quarter 2021, visitation was 8.5 per cent lower than in the September quarter 2019 and visitor nights were down 12.5 per cent. Intrastate visitation was stable (down by 0.7 per cent and intrastate nights were down 1.7 per cent).

Annual % change in Total Overnight Visitation



Overnight visitation by market



SGBR Regional Snapshot

Year Ending September 2021

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	848,000	46.8%	15.3%	3,565,000	98.7%	21.4%	4.2	1.1	0.2
VFR	595,000	14.8%	-14.1%	2,030,000	-17.5%	-27.2%	3.4	-1.3	-0.6
Business	518,000	-6.3%	-30.8%	1,990,000	-6.2%	-33.2%	3.8	0.0	-0.1
Domestic³	2,111,000	16.8%	-8.9%	8,096,000	16.5%	-10.5%	3.8	0.0	-0.1
Intrastate									
Holiday	781,000	48.6%	30.7%	3,094,000	94.7%	51.9%	4.0	0.9	0.6
VFR	520,000	13.9%	-14.5%	1,561,000	-24.0%	-19.8%	3.0	-1.5	-0.2
Business	490,000	-7.3%	-29.0%	1,828,000	-7.4%	-30.6%	3.7	0.0	-0.1
Intrastate	1,926,000	15.9%	-4.7%	6,918,000	12.7%	0.3%	3.6	-0.1	0.2
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	185,000	27.3%	-37.2%	1,178,000	45.1%	-45.2%	6.4	0.8	-0.9

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	2,848,000	21.4%	-2.3%	\$449.8m	6.0%	-6.3%
Queensland	40,045,000	-0.3%	-24.2%	\$4,559.5m	1.5%	-21.9%
Australia	165,015,000	-7.7%	-33.6%	\$18,256.5m	-4.2%	-30.7%

State comparison - Domestic Overnight						
All Visitors	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019
Queensland	20,313,000	9.8%	-21.6%	82,635,000	13.8%	-19.7%
NSW	25,750,000	-3.4%	-33.9%	91,560,000	3.1%	-25.3%
Victoria	17,334,000	0.5%	-41.7%	56,135,000	3.0%	-32.8%
Australia	82,685,000	3.0%	-29.6%	324,999,000	8.3%	-22.2%
Holiday Visitors	Visitors	Year % Chg	Change vs YE Dec 2019	Nights	Year % Chg	Change vs YE Dec 2019
Queensland	8,725,000	27.3%	-12.8%	39,109,000	43.6%	-9.9%
NSW	11,290,000	14.2%	-23.7%	40,733,000	19.9%	-19.6%
Victoria	8,192,000	17.4%	-34.2%	27,024,000	16.5%	-24.6%
Australia	37,460,000	21.6%	-19.0%	149,391,000	28.9%	-13.7%

September quarterly Data		
	SGBR	Queensland
Overnight Visitors	551,000	4,241,000
Change over the year	2.1%	-9.5%
Change vs 2019	-8.5%	-35.9%
Nights	2,457,000	18,967,000
Change over the year	9.1%	-1.3%
Change vs 2019	-12.5%	-33.9%



LADY ELLIOT ISLAND, BUNDABERG

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For tourism region definitions, click here



GREAT KEPPEL ISLAND, CAPRICORN

Regional Comparison



Year Ending September 2021

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			% Share of Total Visitors
										Holiday %	VFR %	Business %	
Brisbane	5,443,000	1.0%	-33.4%	15,880,000	-1.2%	-32.9%	2.9	-0.1	0.0	31%	42%	19%	27%
Gold Coast	3,068,000	16.3%	-27.0%	11,092,000	22.9%	-33.0%	3.6	0.2	-0.3	55%	32%	10%	15%
TNQ	1,939,000	25.0%	-12.6%	10,235,000	34.7%	-8.5%	5.3	0.4	0.2	55%	19%	20%	10%
Sunshine Coast	3,601,000	13.0%	-11.1%	12,933,000	14.3%	-11.0%	3.6	0.0	0.0	58%	32%	6%	18%
SGBR	2,111,000	16.8%	-8.9%	8,096,000	16.5%	-10.5%	3.8	0.0	-0.1	40%	28%	25%	10%
SQC	2,068,000	18.9%	-7.3%	6,190,000	25.4%	4.9%	3.0	0.2	0.3	33%	35%	23%	10%
Townsville North Queensland	1,039,000	26.3%	-19.9%	4,278,000	33.5%	-10.6%	4.1	0.2	0.4	39%	30%	24%	5%
Outback Queensland*	977,000	10.6%	-15.2%	4,769,000	6.7%	-21.9%	4.9	n/p	-0.4	31%	17%	43%	5%
Whitsundays*	720,000	42.8%	14.1%	2,945,000	32.1%	5.6%	4.1	n/p	-0.3	68%	13%	14%	4%
Fraser Coast*	699,000	23.0%	-8.9%	2,391,000	14.6%	-22.0%	3.4	n/p	-0.6	49%	34%	10%	3%
Mackay*	965,000	-5.8%	-9.3%	3,578,000	-18.0%	-18.3%	3.7	n/p	-0.4	24%	15%	52%	5%
Total Queensland	20,313,000	9.8%	-21.6%	82,635,000	13.8%	-19.7%	4.1	0.1	0.1	43%	33%	20%	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.

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