

Year Ending December 2020



| | Visitors | Holiday | VFR | Business | Expenditure (\$m) |
|----------------------------------|----------------|----------------|----------------|------------|-------------------|
| Domestic Overnight | 575,000 | 272,000 | 213,000 | n/p | \$325.9m |
| 3-yr trend % change ² | ▼ -4.5% | ▼ -8.2% | ▼ -2.0% | n/p | ▼ -3.8% |
| International Overnight | 26,000 | 23,000 | n/p | n/p | n/p |
| Annual % change ¹ | ▼ -80.3% | ▼ -80.1% | n/p | n/p | n/p |
| 3-yr trend % change | ▼ -30.0% | ▼ -30.4% | n/p | n/p | n/p |
| TOTAL | 601,000 | 295,000 | n/p | n/p | n/p |
| Annual % change | ▼ -33.1% | ▼ -43.2% | n/p | n/p | n/p |
| 3-yr trend % change | ▼ -8.5% | ▼ -13.5% | n/p | n/p | n/p |



Domestic Visitors

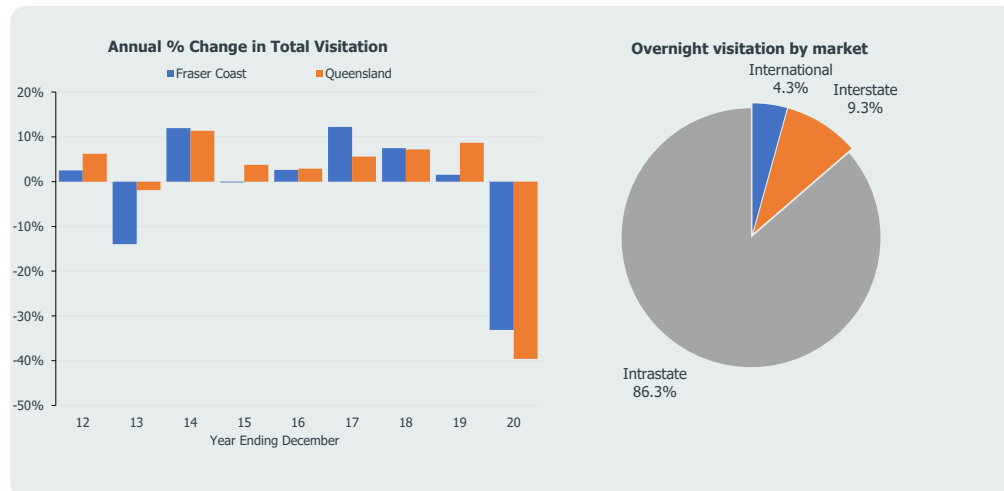
The year ending December 2020 includes all of the major impacts of COVID-19 restrictions on domestic travel to date. Queensland's borders closed on 3 April and all non-essential travel was banned soon after. Intrastate overnight travel was permitted within Queensland from 1 June, while interstate borders were reopened to all states except Victoria on 10 July but were reclosed to New South Wales and ACT a month after. Borders reopened to ACT as of 25 September, all of regional NSW by 3 November and Victoria and Greater Sydney on 1 December. Restrictions were put in place on Greater Sydney again on 20 December.

- Annual overnight visitor expenditure on the Fraser Coast decreased by 3.8 per cent on average over the past three years to \$325.9 million in the year ending December 2020. This was on the back of visitation, which decreased by 4.5 per cent on average over this period to 575,000. Spend per visitor increased by 1.0 per cent to \$567 per visitor.
- Average Length of Stay (ALoS) decreased by 8.4 per cent on average over the past three years to 3.3 nights, so that total nights decreased by 11.4 per cent on average over the period to 1.9m.
- Holiday visitation fell by 8.2 per cent on average to 272,000 while Visiting Friends and Relatives (VFR) travel declined by 2.0 per cent on average over the three-year period to 213,000.
- The number of intrastate visitors remained stable (up 0.6 per cent) on average over the three-year period at 519,000 visitors in the year ending December 2020. These visitors represent 90 per cent of the domestic overnight visitor market for the Fraser Coast region. Intrastate holiday fell by 2.6 per cent on average and VFR trips were up 3.0 per cent on average over the three-year trend. Visitation from Fraser Coast's largest source market, Brisbane was up by 4.9 per cent on average to 252,000 in the year ending December 2020.

International Visitors

NOTE: International Visitor Survey (IVS) interviews have been paused due to border closures in late March 2020. As a result, from June 2020 the IVS has been produced using more extensive immigration and incoming passenger card information and spend has been imputed to previous IVS interviews.

- In the year ending December 2020, visitation decreased by 80.3 per cent to 26,000. Visitors' ALoS increased by 1.7 nights to 6.5 nights, with total international visitor nights falling by 73.2 per cent to 168,000. International visitor expenditure data was not reportable for the year ending December 2020 due to the small sample size.
- Holidaymakers made up nine in 10 (90 per cent) international visitors to the Fraser Coast. In the year ending December 2020, holiday visitation decreased by 80.1 per cent over the year to 23,000.



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Year Ending December 2020

Domestic visitors to Fraser Coast

| | Visitors | Trend % Chg | Nights | Trend % Chg | Length of Stay | Year # Chg |
|-----------------------------|----------------|--------------|------------------|---------------|----------------|-------------|
| Holiday | 272,000 | -8.2% | 1,056,000 | -13.9% | 3.9 | -1.3 |
| VFR | 213,000 | -2.0% | 638,000 | -6.6% | 3.0 | 0.2 |
| Business | n/p | n/p | n/p | n/p | n/p | n/p |
| Domestic³ | 575,000 | -4.5% | 1,905,000 | -11.4% | 3.3 | -0.7 |
| Intrastate | | | | | | |
| Holiday | 251,000 | -2.6% | 938,000 | -5.3% | 3.7 | -0.3 |
| VFR | 188,000 | 3.0% | 451,000 | -6.7% | 2.4 | 0.0 |
| Business | n/p | n/p | n/p | n/p | n/p | n/p |
| Intrastate | 519,000 | 0.6% | 1,567,000 | -4.2% | 3.0 | -0.1 |
| Interstate | | | | | | |
| Holiday | 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 |
| Business | n/p | n/p | n/p | n/p | n/p | n/p |
| Interstate | n/p | n/p | n/p | n/p | n/p | n/p |

Domestic day trip visitors

| Total Visitors | Day trip visitors | Year % Chg | Expenditure (\$) million | Year % Chg |
|------------------|--------------------|---------------|--------------------------|---------------|
| Fraser Coast | 371,000 | -60.3% | \$50.5m | -34.6% |
| Queensland | 39,272,000 | -25.7% | \$4,247.9m | -27.2% |
| Australia | 164,192,000 | -33.9% | \$17,433.1m | -33.8% |

State comparison - Domestic

| All Visitors | Visitors | Year % Chg | Nights | Year % Chg |
|------------------|-------------------|---------------|--------------------|---------------|
| Queensland | 16,851,000 | -35.0% | 66,194,000 | -35.7% |
| NSW | 24,447,000 | -37.3% | 83,772,000 | -31.6% |
| Victoria | 13,963,000 | -53.1% | 46,232,000 | -44.6% |
| Australia | 72,514,000 | -38.3% | 275,404,000 | -34.1% |
| Holiday Visitors | Visitors | Year % Chg | Nights | Year % Chg |
| Queensland | 6,433,000 | -35.7% | 25,737,000 | -40.7% |
| NSW | 9,699,000 | -34.4% | 34,735,000 | -31.4% |
| Victoria | 5,839,000 | -53.1% | 19,708,000 | -45.0% |
| Australia | 29,391,000 | -36.4% | 111,252,000 | -35.7% |

International visitor to Fraser Coast

| All Visitors | Visitors | Annual % Chg | Nights | Annual % Chg |
|--------------------------|---------------|---------------|----------------|---------------|
| Holiday | 23,000 | -80.1% | 75,000 | -77.0% |
| VFR | n/p | n/p | n/p | n/p |
| Business | n/p | n/p | n/p | n/p |
| Education | n/p | n/p | n/p | n/p |
| Total³ | 26,000 | -80.3% | 168,000 | -73.2% |

State comparison - International

| All Visitors | Visitors | Year % Chg | Nights | Year % Chg |
|------------------|------------------|---------------|-------------------|---------------|
| Queensland | 493,000 | -82.3% | 12,361,000 | -77.5% |
| NSW | 839,000 | -80.9% | 24,428,000 | -74.7% |
| Victoria | 615,000 | -80.4% | 19,599,000 | -73.2% |
| Australia | 1,705,000 | -80.4% | 68,973,000 | -74.9% |
| Holiday Visitors | Visitors | Year % Chg | Nights | Year % Chg |
| Queensland | 302,000 | -83.9% | 4,365,000 | -80.9% |
| NSW | 428,000 | -82.5% | 6,001,000 | -79.2% |
| Victoria | 307,000 | -81.9% | 3,647,000 | -79.4% |
| Australia | 847,000 | -82.0% | 17,471,000 | -79.3% |

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.

For tourism region definitions, please see <https://www.tra.gov.au/Regional/tourism-regions>.



Eli Creek

Regional Comparison

Year Ending December 2020

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 | 4,727,000 | -42.8% | 14,016,000 | -41.4% | 3.0 | 0.1 | 26% | 44% | 19% | 28% |
| Gold Coast | 2,222,000 | -47.1% | 7,619,000 | -54.0% | 3.4 | -0.5 | 49% | 37% | 10% | 13% |
| TNQ | 1,448,000 | -34.7% | 6,993,000 | -37.5% | 4.8 | -0.2 | 48% | 22% | 25% | 9% |
| Sunshine Coast | 3,034,000 | -25.1% | 10,527,000 | -27.6% | 3.5 | -0.1 | 58% | 32% | 7% | 18% |
| SGBR | 1,788,000 | -22.8% | 7,044,000 | -22.2% | 3.9 | 0.0 | 33% | 29% | 28% | 11% |
| SQC | 1,646,000 | -25.0% | 4,718,000 | -20.0% | 2.9 | 0.2 | 31% | 35% | 26% | 10% |
| Townsville | 797,000 | -38.6% | 2,778,000 | -42.0% | 3.5 | -0.2 | 35% | 27% | 28% | 5% |
| Outback* | 823,000 | -5.6% | 4,311,000 | 0.5% | 5.2 | n/p | 28% | 16% | 47% | 5% |
| Whitsundays* | 532,000 | -0.4% | 2,124,000 | -4.4% | 4.0 | n/p | 62% | 18% | 14% | 3% |
| Fraser Coast* | 575,000 | -4.5% | 1,905,000 | -11.4% | 3.3 | n/p | 47% | 37% | 8% | 3% |
| Mackay* | 939,000 | 3.8% | 3,905,000 | 0.6% | 4.2 | n/p | 15% | 13% | 63% | 6% |
| Total Queensland | 16,851,000 | -35.0% | 66,194,000 | -35.7% | 3.9 | 0.0 | 38% | 34% | 22% | 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 | 273,000 | -81.6% | 6,306,000 | -77.2% | 23.1 | 4.5 | 46% | 31% | 8% | 55% |
| Gold Coast | 173,000 | -84.0% | 2,348,000 | -76.0% | 13.6 | 4.5 | 74% | 18% | 2% | 35% |
| TNQ | 133,000 | -83.5% | 1,451,000 | -78.8% | 10.9 | 2.5 | 89% | 7% | 2% | 27% |
| Sunshine Coast | 56,000 | -83.0% | 634,000 | -77.7% | 11.3 | 2.7 | 76% | 23% | 2% | 11% |
| SGBR | 23,000 | -83.9% | 254,000 | -87.8% | 11.2 | -3.6 | 76% | 16% | 0% | 5% |
| SQC* | 10,000 | -24.5% | 281,000 | -24.1% | 28.7 | n/p | 36% | 48% | 7% | 2% |
| Townsville | 23,000 | -81.7% | 239,000 | -83.5% | 10.3 | -1.1 | 75% | 16% | 2% | 5% |
| Outback* | n/p | n/p | n/p | n/p | n/p | n/p | n/p | n/p | n/p | n/p |
| Whitsundays | 43,000 | -80.4% | 232,000 | -83.1% | 5.4 | -0.8 | 95% | 2% | 1% | 9% |
| Fraser Coast* | 26,000 | -80.3% | 168,000 | -73.2% | 6.5 | 1.7 | 89% | 9% | 1% | 5% |
| Mackay* | 7,000 | -27.8% | 65,000 | -28.4% | 9.2 | n/p | 64% | 31% | 0% | 1% |
| Total Queensland | 493,000 | -82.3% | 12,361,000 | -77.5% | 25.1 | 5.3 | 61% | 29% | 6% | 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.

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.

Disclaimer:

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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.