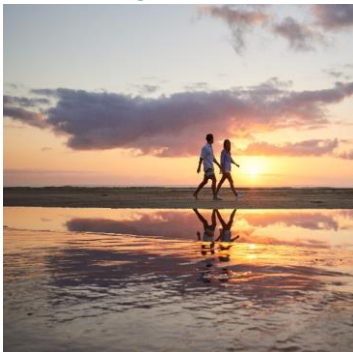
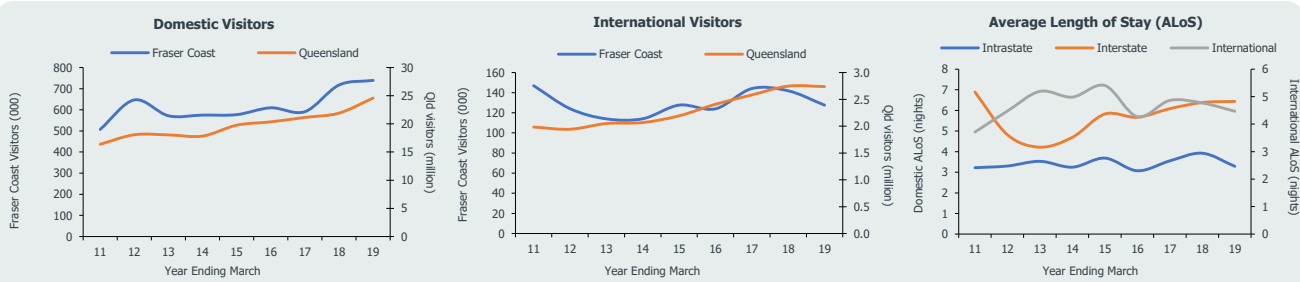


Fraser Coast Regional Snapshot

Year Ending March 2019



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	739,000	389,000	254,000	n/p	\$388.4m
3-yr trend % change ²	▲ 6.8%	▲ 6.1%	▲ 5.0%	n/p	▲ 11.7%
International Overnight	128,000	118,000	9,000	n/p	\$44.3m
Annual % change ¹	▼ -10.0%	▼ -8.3%	n/p	n/p	▲ 3.1%
3-yr trend % change	▲ 0.9%	● 0.0%	n/p	n/p	▲ 9.7%
TOTAL	867,000	507,000	263,000	n/p	\$432.7m
Annual % change	▲ 0.9%	▼ -6.8%	▲ 11.5%	n/p	▼ -7.5%
3-yr trend % change	▲ 5.7%	▲ 4.5%	▲ 5.3%	n/p	▲ 11.5%

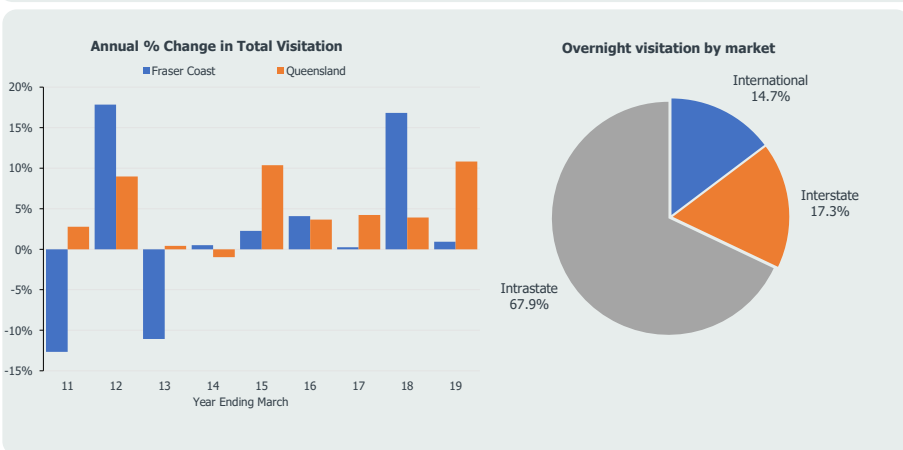


Domestic Visitors

- The Fraser Coast region welcomed 739,000 domestic overnight visitors in the year ending March 2019, growing an average of 6.8% over the past three years.
- Total overnight visitor expenditure increased by 11.7% on average over the past three years to \$388.4m. The growth in expenditure was the result of an increase in both total nights and visitors increasing their average spend per night. Total nights increased by 7.9% on average over three years to 2.9m and average length of stay (ALoS) increased by 1.6% on average over the past three years to 3.9 nights. Spend-per night was up 3.7% on average over the past three years to \$134/night.
- Growth in visitation to the region was driven by the holiday sector, which grew 6.1% on average over the three-year period to reach 389,000, while visiting friends and relatives (VFR) visitation grew by 5.0% on average to 254,000 visitors. The holiday market accounts for more than half of domestic visitors to the region (53%) and VFR accounts for one-third (34%).
- The intrastate market saw growth of 9.3% on average to 589,000 visitors over the three years ending March 2019, accounting for 80% of domestic overnight visitation to the Fraser Coast region. Growth was underpinned by a rise in visitors from Brisbane, the region's largest source market, with visitation up by 13.6% on average to 243,000 over the period.
- The interstate market accounts for 20% of domestic overnight visitation to the Fraser Coast region, with visitation from this market decreasing by 1.3% to 150,000 over the three years ending March 2019. Three-quarters of interstate visitors are on holidays.

International Visitors

- There were 128,000 international visitors to the Fraser Coast region in the year ending March 2019, a decrease of 10.0% year on year. The international market accounted for 15% of total overnight visitation and 10% of total overnight expenditure in the region.
- International visitors spent less time in the region than a year ago. Average length of stay decreased by 0.3 nights to 4.5 nights, and this combined with softer visitation lead to total nights decreasing by 15.7% to 571,000. However, visitors spent more per night (up \$14 to \$78), compensating for the decrease in nights, and resulting in a 3.1% increase in total overnight visitor expenditure to \$44.3m.
- Western markets dominate the region's top international source markets, accounting for 92% of international visitation. Visitation from western markets decreased by 10.4% to 118,000. The two largest individual markets, United Kingdom and Germany account for 22% and 17% of visitation respectively.
- The holiday market continued to account for the majority (92%) of international visitation to the region, with holiday visitation decreasing by 8.3% to 118,000 in the year ending March 2019.



New National Visitor Survey methodology, 2019
 Tourism Research Australia has transitioned NVS sampling to 100% mobile phone interviews (from 50% mobile phone/50% landline) to reflect current phone usage trends. The change in methodology has seen a break in series, so please use with caution when comparing 2019 results with previous time periods.

Note that 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.

Research Updates

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

Fraser Coast Regional Snapshot

Domestic visitation Year Ending March 2019

Domestic visitors to Fraser Coast

	Visitors	Trend % Chg	Nights	Trend % Chg	Length of Stay	Year # Chg
Holiday	389,000	6.1%	1,899,000	12.0%	4.9	0.0
VFR	254,000	5.0%	770,000	0.3%	3.0	-1.3
Business	n/p	n/p	n/p	n/p	n/p	n/p
Domestic³	739,000	6.8%	2,905,000	7.9%	3.9	-0.6
Intrastate						
Holiday	276,000	6.3%	1,099,000	10.0%	4.0	0.0
VFR	235,000	13.6%	667,000	14.4%	2.8	-1.7
Business	n/p	n/p	n/p	n/p	n/p	n/p
Intrastate	589,000	9.3%	1,938,000	10.6%	3.3	-0.6
Interstate						
Holiday	113,000	n/p	799,000	n/p	7.1	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	150,000	-1.3%	968,000	3.0%	6.4	0.1

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Fraser Coast	870,000	48.4%	\$78.1m	26.7%
Queensland	46,689,000	12.7%	\$5,218.m	14.9%
Australia	218,369,000	11.0%	\$23,522.9m	12.4%

Key domestic source markets to Fraser Coast

All Visitors	Visitors	Trend % Chg	Nights	Trend % Chg
Brisbane	243,000	13.6%	862,000	11.3%
Regional Qld	346,000	6.3%	1,075,000	10.0%
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	24,584,000	12.2%	97,052,000	11.6%
NSW	35,606,000	7.9%	111,371,000	8.3%
Victoria	27,832,000	11.8%	78,965,000	12.6%
Australia	109,051,000	10.1%	386,162,000	9.8%

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,530,000	9.6%	42,266,000	7.5%
NSW	14,056,000	6.9%	47,962,000	6.9%
Victoria	11,693,000	9.2%	33,453,000	5.5%
Australia	43,708,000	9.8%	164,362,000	7.2%



Fraser Coast Regional Snapshot

International visitation Year Ending March 2019

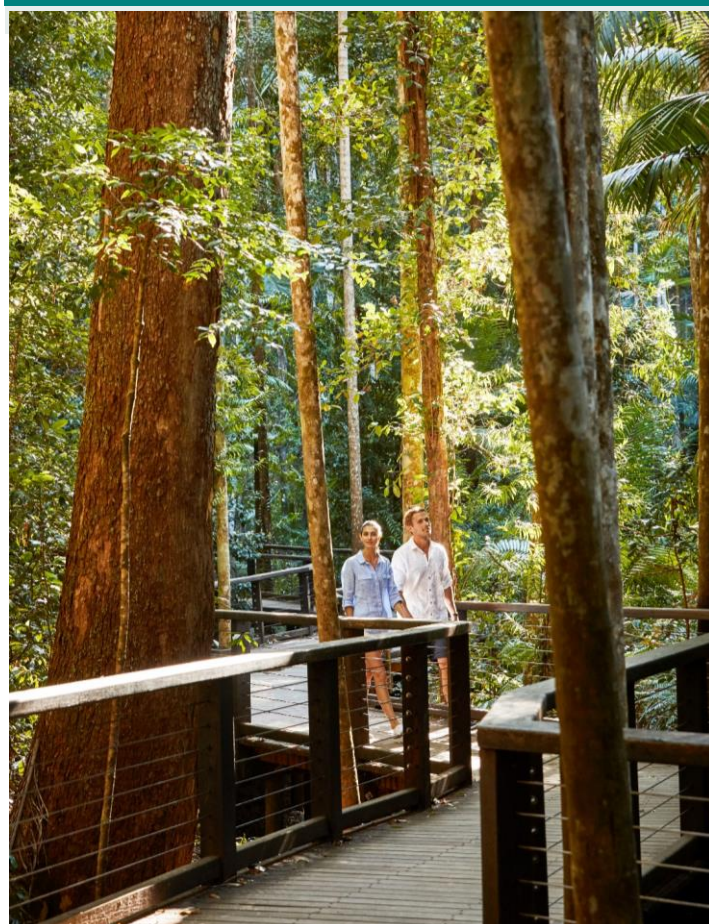
International visitors to Fraser Coast

All Visitors	Visitors	Annual % Chg	Nights	Annual % Chg	Length of Stay	Year # Chg
Holiday	118,000	-8.3%	410,000	-1.6%	3.5	0.2
VFR	9,000	n/p	97,000	n/p	11.1	n/p
Business	n/p	n/p	n/p	n/p	n/p	n/p
Total³	128,000	-10.0%	571,000	-15.7%	4.5	-0.3

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,738,000	-0.3%	54,366,000	1.4%
NSW	4,346,000	0.3%	97,418,000	3.2%
Victoria	3,088,000	5.0%	71,690,000	5.6%
Australia	8,534,000	2.7%	270,672,000	0.8%

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,848,000	-1.1%	22,710,000	-1.2%
NSW	2,451,000	-0.7%	28,451,000	2.4%
Victoria	1,648,000	7.5%	16,982,000	5.2%
Total	4,629,000	3.5%	82,959,000	1.5%



Top 10 source markets

Total	Visitors	Annual % Chg	Nights	Annual % Chg
United Kingdom	29,000	-5.5%	143,000	18.1%
Germany	22,000	-30.2%	63,000	-40.9%
New Zealand	11,000	n/p	66,000	n/p
Netherlands	8,000	27.5%	25,000	21.7%
Scandinavia	8,000	-22.8%	29,000	7.2%
USA	7,000	n/p	40,000	n/p
Switzerland	7,000	1.4%	16,000	-9.6%
France	6,000	-21.2%	31,000	-16.4%
Canada	n/p	n/p	n/p	n/p
Italy	n/p	n/p	n/p	n/p

Due to sampling, some data may not be publishable (n/p), however the markets will still appear in order.

Top 10 holiday source markets

Holiday	Visitors	Annual % Chg	Nights	Annual % Chg
United Kingdom	27,000	-4.1%	67,000	-2.9%
Germany	22,000	-28.0%	63,000	-23.1%
Netherlands	8,000	25.7%	24,000	46.3%
Scandinavia	8,000	-22.3%	28,000	7.2%
New Zealand	n/p	n/p	n/p	n/p
Switzerland	7,000	0.8%	16,000	-11.8%
USA	6,000	n/p	n/p	n/p
France	5,000	-22.4%	22,000	-25.9%
Canada	n/p	n/p	n/p	n/p
Italy	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 March 2019

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	7,625,000	9.9%	22,030,000	4.3%	2.9	-0.2	28%	38%	25%	31%
Gold Coast	4,002,000	16.8%	15,785,000	22.4%	3.9	0.2	53%	29%	14%	16%
TNQ	2,019,000	5.2%	10,744,000	17.8%	5.3	0.6	50%	25%	22%	8%
Sunshine Coast	3,855,000	15.0%	13,431,000	11.7%	3.5	-0.1	55%	34%	9%	16%
SGBR	2,218,000	9.3%	8,348,000	13.9%	3.8	0.2	33%	27%	32%	9%
SQC	2,192,000	8.9%	5,979,000	5.9%	2.7	-0.1	26%	41%	25%	9%
Townsville	1,427,000	31.9%	4,878,000	35.6%	3.4	0.1	34%	29%	29%	6%
Outback*	965,000	7.5%	5,151,000	16.3%	5.3	n/p	33%	18%	46%	4%
Whitsundays*	646,000	10.2%	3,112,000	14.5%	4.8	n/p	63%	16%	21%	3%
Fraser Coast*	739,000	6.8%	2,905,000	7.9%	3.9	n/p	53%	34%	8%	3%
Mackay*	1,002,000	7.0%	3,997,000	12.9%	4.0	n/p	22%	21%	52%	4%
Total Queensland	24,584,000	12.2%	97,052,000	11.6%	3.9	0.0	39%	33%	24%	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	1,411,000	4.5%	27,579,000	2.6%	19.5	-0.3	52%	31%	9%	52%
Gold Coast	1,027,000	-2.1%	9,744,000	-0.6%	9.5	0.1	78%	15%	4%	38%
TNQ	849,000	-3.1%	6,648,000	7.5%	7.8	0.8	92%	5%	2%	31%
Sunshine Coast	309,000	0.9%	2,885,000	-3.1%	9.3	-0.4	76%	21%	2%	11%
SGBR	140,000	-8.8%	1,632,000	-28.8%	11.7	-3.3	78%	14%	4%	5%
SQC*	57,000	9.6%	1,578,000	0.9%	27.8	n/p	37%	32%	16%	2%
Townsville	132,000	-11.0%	1,486,000	20.2%	11.2	2.9	82%	14%	3%	5%
Outback*	28,000	-2.5%	459,000	-5.7%	16.3	n/p	70%	15%	5%	1%
Whitsundays	226,000	-6.3%	1,407,000	11.1%	6.2	1.0	97%	3%	0%	8%
Fraser Coast*	128,000	-10.0%	571,000	-15.7%	4.5	-0.3	92%	7%	0%	5%
Mackay*	52,000	7.7%	361,000	-14.3%	6.9	n/p	74%	20%	5%	2%
Total Queensland	2,738,000	-0.3%	54,366,000	1.4%	19.9	0.3	67%	26%	8%	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% mobile phone interview (from 50% mobile phone/50% 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

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.