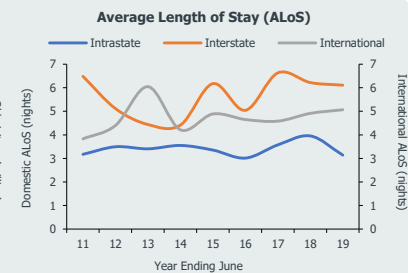
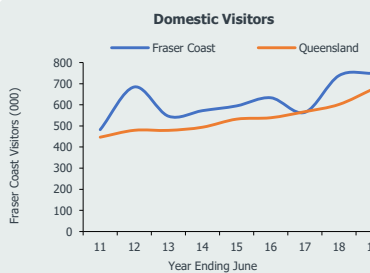


Fraser Coast Regional Snapshot

Year Ending June 2019



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	749,000	412,000	244,000	n/p	\$393.0m
3-yr trend % change ²	▲ 6.0%	▲ 7.3%	▲ 1.6%	n/p	▲ 13.1%
International Overnight	131,000	119,000	11,000	n/p	\$46.1m
Annual % change ¹	▼ -6.0%	▼ -5.8%	n/p	n/p	▲ 5.7%
3-yr trend % change	▲ 1.4%	● 0.1%	n/p	n/p	▲ 9.6%
TOTAL	881,000	531,000	255,000	n/p	\$439.1m
Annual % change	● 0.3%	▼ -1.1%	▲ 2.4%	n/p	▼ -5.1%
3-yr trend % change	▲ 5.2%	▲ 5.4%	▲ 2.1%	n/p	▲ 12.7%

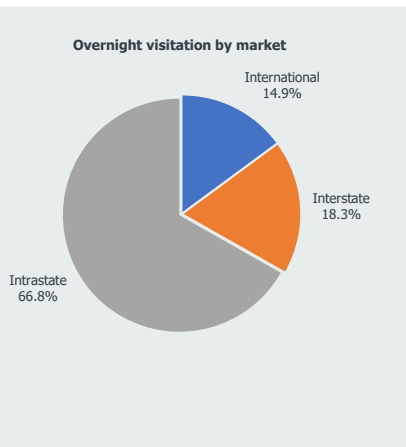
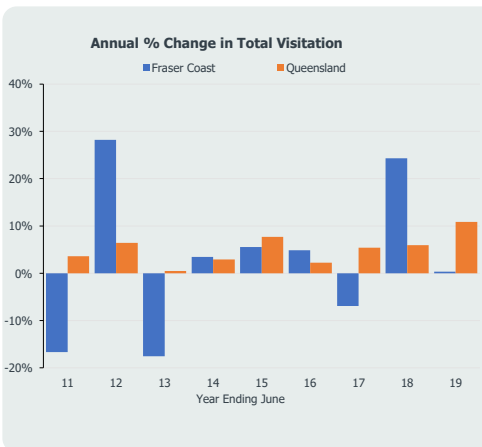


Domestic Visitors

- The Fraser Coast region welcomed 749,000 domestic overnight visitors in the year ending June 2019, growing at an average of 6.0% over the past three years.
- Total overnight visitor expenditure increased by 13.1% on average over the past three years to \$393.0m. The growth in expenditure was the result of an increase in visitation, average length of stay and visitors increasing their average spend-per-night. Total nights increased by 7.9% on average over three years to 2.8m and average length of stay (ALoS) increased by 2.4% on average over the past three years to 3.8 nights. Spend-per-night was up 5.2% on average over the past three years to \$139 per night.
- Growth in visitation to the region was driven by the holiday sector, which grew 7.3% on average over the three-year period to reach 412,000 while VFR visitation grew by 1.6% on average to 244,000 visitors.
- The number of intrastate visitors grew 6.8% on average over the three-year period to 588,000 visitors over the three years ending June 2019. These visitors represent 78% of the domestic overnight visitor market for the Fraser Coast region. Intrastate holiday and intrastate VFR grew 6.5% and 4.8% on average respectively (three-year trend). Growth was underpinned by a rise in visitors from Brisbane, the region's largest source market, with visitation up by 13.4% on average to 258,000 over the period.
- The interstate market accounted for 22% of domestic overnight visitation to the Fraser Coast region in the year ending June 2019. The interstate market grew to 161,000 visitors in the year ending June 2019, an increase of 3.1% on average over the past three years. The holiday sector (up 9.4% on average over the three years) accounted for 72% of interstate visitors.

International Visitors

- The Fraser Coast region recorded 131,000 international visitors for the year ending June 2019, a decrease of 6.0% year on year. The international market accounted for 15% of total overnight visitation and 11% of total overnight expenditure in the region.
- While the ALoS increased by 0.2 nights to 5.1 nights, the softer level of visitation led to total nights decreasing by 3.0% to 664,000 visitor nights. However, visitor spend-per-night increased 9.1% to \$69 per night, resulting in total overnight visitor expenditure increasing 5.7% to \$46.1m.
- Western markets dominate the region's top international source markets, accounting for 92% of international visitation. Visitation from western markets decreased by 6.6% to 120,000 as the region's two largest individual markets, the UK and Germany, both experienced a decline in visitation to 29,000 (down 2.4%) and 22,000 (down 26.3%) visitors respectively. These two markets account for 22% and 17% of visitation to the Fraser Coast respectively.
- International visitors to the Fraser Coast were predominately holidaymakers (91%) whose numbers decreased year-on-year by 5.8% to 119,000 in the year ending June 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 June 2019

Domestic visitors to Fraser Coast

	Visitors	Trend % Chg	Nights	Trend % Chg	Length of Stay	Year # Chg
Holiday	412,000	7.3%	1,897,000	15.0%	4.6	-0.2
VFR	244,000	1.6%	712,000	-4.1%	2.9	-1.4
Business	n/p	n/p	n/p	n/p	n/p	n/p
Domestic³	749,000	6.0%	2,833,000	7.9%	3.8	-0.7
Intrastate						
Holiday	296,000	6.5%	1,121,000	11.0%	3.8	-0.3
VFR	212,000	4.8%	559,000	3.2%	2.6	-1.8
Business	n/p	n/p	n/p	n/p	n/p	n/p
Intrastate	588,000	6.8%	1,847,000	7.2%	3.1	-0.8
Interstate						
Holiday	116,000	9.4%	776,000	22.0%	6.7	0.0
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	161,000	3.1%	986,000	9.2%	6.1	-0.1

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Fraser Coast	892,000	46.7%	\$80.1m	49.8%
Queensland	48,508,000	12.6%	\$5,296.6m	7.6%
Australia	227,319,000	12.6%	\$24,321.0m	12.7%

Key domestic source markets to Fraser Coast

All Visitors	Visitors	Trend % Chg	Nights	Trend % Chg
Brisbane	258,000	13.4%	854,000	9.8%
Regional Qld	330,000	2.4%	993,000	5.1%
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	25,312,000	12.2%	99,982,000	10.8%
NSW	37,237,000	10.6%	116,060,000	10.7%
Victoria	29,047,000	13.8%	81,165,000	10.6%
Australia	113,320,000	11.7%	400,217,000	10.4%

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,808,000	10.6%	43,038,000	7.1%
NSW	14,559,000	7.8%	49,712,000	9.3%
Victoria	12,354,000	13.1%	35,388,000	8.8%
Australia	45,340,000	11.1%	169,582,000	8.5%



Fraser Coast Regional Snapshot

International visitation Year Ending June 2019

International visitors to Fraser Coast

All Visitors	Visitors	Annual % Chg	Nights	Annual % Chg	Length of Stay	Year # Chg
Holiday	119,000	-5.8%	400,000	-5.3%	3.4	0.0
VFR	11,000	n/p	195,000	n/p	18.0	n/p
Business	n/p	n/p	n/p	n/p	n/p	n/p
Total³	131,000	-6.0%	664,000	-3.0%	5.1	0.2

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,757,000	0.1%	54,575,000	0.9%
NSW	4,376,000	0.8%	98,142,000	4.1%
Victoria	3,101,000	4.3%	72,935,000	6.3%
Australia	8,601,000	2.8%	273,023,000	1.4%

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,853,000	-1.4%	22,802,000	-0.7%
NSW	2,470,000	0.4%	29,497,000	7.7%
Victoria	1,671,000	8.0%	17,032,000	6.7%
Total	4,669,000	3.8%	84,278,000	4.0%



Top 10 source markets

Total	Visitors	Annual % Chg	Nights	Annual % Chg
United Kingdom	29,000	-2.4%	164,000	32.9%
Germany	22,000	-26.3%	63,000	-36.9%
New Zealand	11,000	n/p	86,000	n/p
Scandinavia	8,000	-7.8%	30,000	29.7%
Netherlands	8,000	21.5%	21,000	-13.2%
USA	8,000	n/p	86,000	n/p
France	6,000	-30.7%	29,000	-29.0%
Switzerland	6,000	-1.1%	15,000	-13.2%
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	26,000	-6.9%	66,000	-6.8%
Germany	22,000	-23.8%	63,000	-16.1%
Scandinavia	8,000	-5.7%	30,000	31.2%
Netherlands	8,000	19.8%	20,000	0.1%
New Zealand	n/p	n/p	n/p	n/p
USA	6,000	n/p	n/p	n/p
Switzerland	6,000	-2.1%	14,000	-15.5%
Canada	n/p	n/p	n/p	n/p
France	5,000	-33.4%	20,000	-38.1%
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>

Disclaimer:

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Regional Comparison



Year Ending June 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	7,741,000	8.2%	22,774,000	6.8%	2.9	0.0	28%	40%	25%	31%
Gold Coast	4,172,000	18.5%	16,388,000	22.8%	3.9	0.1	54%	29%	14%	16%
TNQ	2,039,000	0.1%	10,351,000	3.4%	5.1	0.2	48%	26%	23%	8%
Sunshine Coast	3,982,000	17.1%	14,072,000	17.7%	3.5	0.0	55%	34%	9%	16%
SGBR	2,342,000	12.7%	8,835,000	14.3%	3.8	0.1	32%	29%	32%	9%
SQC	2,204,000	6.2%	5,908,000	-1.5%	2.7	-0.2	28%	40%	25%	9%
Townsville	1,452,000	27.5%	4,822,000	22.7%	3.3	-0.1	29%	31%	31%	6%
Outback*	1,051,000	8.7%	5,819,000	21.6%	5.5	n/p	30%	18%	49%	4%
Whitsundays*	643,000	8.4%	2,978,000	13.6%	4.6	n/p	63%	16%	19%	3%
Fraser Coast*	749,000	6.0%	2,833,000	7.9%	3.8	n/p	55%	33%	9%	3%
Mackay*	1,097,000	13.3%	4,363,000	17.8%	4.0	n/p	20%	17%	57%	4%
Total Queensland	25,312,000	12.2%	99,982,000	10.8%	4.0	0.0	39%	34%	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	1,424,000	3.4%	27,476,000	-1.2%	19.3	-0.9	52%	32%	10%	52%
Gold Coast	1,050,000	0.2%	9,743,000	1.5%	9.3	0.1	78%	16%	4%	38%
TNQ	849,000	-1.7%	6,853,000	14.4%	8.1	1.1	92%	5%	2%	31%
Sunshine Coast	322,000	5.3%	3,092,000	14.5%	9.6	0.8	76%	21%	2%	12%
SGBR	141,000	-8.4%	2,031,000	-3.1%	14.4	0.8	79%	14%	4%	5%
SQC*	58,000	11.5%	1,282,000	1.3%	22.3	n/p	38%	35%	15%	2%
Townsville	133,000	-8.7%	1,337,000	-0.2%	10.1	0.9	82%	14%	2%	5%
Outback*	25,000	-3.8%	365,000	-5.5%	14.7	n/p	70%	16%	6%	1%
Whitsundays	227,000	-7.1%	1,362,000	3.5%	6.0	0.6	96%	3%	0%	8%
Fraser Coast*	131,000	-6.0%	664,000	-3.0%	5.1	0.2	91%	8%	1%	5%
Mackay*	55,000	9.6%	355,000	-9.6%	6.5	n/p	73%	19%	6%	2%
Total Queensland	2,757,000	0.1%	54,575,000	0.9%	19.8	0.2	67%	27%	7%	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 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.