

Year Ending December 2017



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	675,000	357,000	226,000	69,000	\$370.2m
3-yr trend % change ²	▲ 4.5%	▲ 5.1%	▲ 3.7%	▲ 8.0%	▲ 8.3%
International Overnight	150,000	139,000	10,000	n/p	\$45.4m
Annual % change ¹	▲ 1.9%	▲ 1.5%	▲ 27.7%	n/p	▲ 10.5%
3-yr trend % change	▲ 5.9%	▲ 5.0%	▲ 13.0%	n/p	▲ 3.9%
TOTAL	825,000	496,000	236,000	n/p	\$415.6m
Annual % change	▲ 11.3%	▲ 12.1%	▲ 6.5%	n/p	▲ 34.0%
3-yr trend % change	▲ 4.7%	▲ 5.1%	▲ 4.0%	n/p	▲ 7.8%

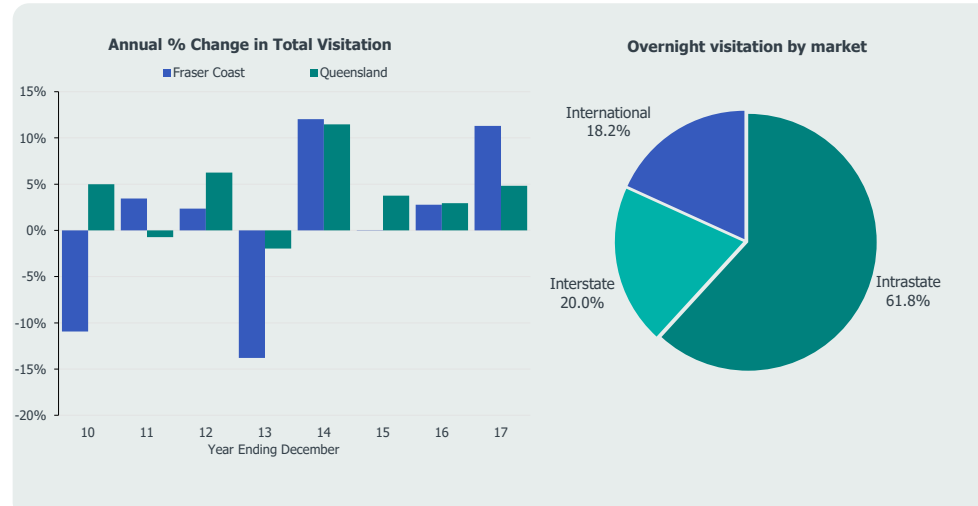


Domestic Visitors

- The Fraser Coast region welcomed 675,000 domestic overnight visitors in the year ending December 2017, a 4.5% rise over the past three years.
- All purposes of travel contributed to this growth. Holiday travel grew by 5.1% to 357,000 visitors on the three-year trend. Visiting friends and relatives (VFR) was up 3.7% to 226,000 while business was up by 8.0% to 69,000 visitors.
- The holiday market is particularly important to the region, accounting for more than half of domestic visitors and visitor nights (53% and 63% respectively). Over the three years ending December 2017, holiday visitors were a key driver of nights growth. The region welcomed more holidaymakers, with 5.1% growth. Holidaymakers increased their average length of stay (ALoS) by 5.5%, leading to an 11.5% increase in holiday nights.
- The intrastate market saw growth of 5.6% to 510,000 visitors over the three years ending December 2017 and accounted for 76% of domestic overnight visitation to the Fraser Coast region. This growth was underpinned by a rise in Brisbane visitors, the region's largest source market, with visitation up by 9.8% to 214,000 over the period.
- Interstate visitation grew slightly, up by 1.2% to 165,000 over the three years ending December 2017.
- Visitor nights grew for both the intrastate and interstate markets over the three years ending December 2017. Intrastate nights were up 4.9% and interstate nights were up by 10.4%. The interstate and intrastate markets delivered an overall 6.8% rise to 2.9m domestic visitor nights, with expenditure in the region reaching \$370.2m, up by 8.3% over the three years.

International Visitors

- International visitation to the Fraser Coast grew by 1.9% to 150,000 visitors in the year ending December 2017. The region's international market accounted for 18% of total overnight visitation and 11% of total overnight expenditure.
- Western markets dominate the region's top international source markets.
- The UK is the region's largest market, representing 23% of international visitors. However, the UK's visitation softened by 9.0% to 34,000 visitors over the past year.
- Germany is the second largest market and was the largest contributor to international visitation growth. German visitation grew by 13.3% to 31,000 visitors, accounting for 21% of international visitors to the region.
- The holiday market continued to account for the majority (92%) of international visitation to the region and it grew by 1.5% to 139,000.
- The average length of stay for holidaymakers remained stable at 3.2 nights in the year ending December 2017. However, VFR visitors shortened their stays, which contributed to a 10.6% decline in total visitor nights, reaching 705,000.
- Despite the decline in visitor nights, overnight visitor expenditure grew by 10.5% to \$45.4m. The increase in expenditure was primarily driven by a 23.5% lift in visitor spend per night on the Fraser Coast.



In late March 2017, Cyclone Debbie and subsequent flooding interrupted tourism operations in several tourism regions, including the Fraser Coast. Relief workers related to recovery efforts may be related to more business travel in some regions.

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

Domestic visitation Year Ending December 2017

Domestic visitors to Fraser Coast

	Visitors	Trend Chg %	Nights	Trend Chg %	Length of Stay	Year # Chg
Holiday	357,000	5.1%	1,845,000	11.5%	5.2	1.3
VFR	226,000	3.7%	799,000	1.2%	3.5	0.1
Business	69,000	8.0%	95,000	-14.0%	1.4	-7.9
Domestic³	675,000	4.5%	2,939,000	6.8%	4.4	0.1
Intrastate						
Holiday	269,000	7.6%	1,108,000	7.6%	4.1	0.7
VFR	169,000	1.8%	583,000	7.4%	3.4	0.6
Business	n/p	n/p	n/p	n/p	n/p	n/p
Intrastate	510,000	5.6%	1,808,000	4.9%	3.5	-0.2
Interstate						
Holiday	88,000	-1.3%	737,000	18.7%	8.4	2.9
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	165,000	1.2%	1,131,000	10.4%	6.9	0.9

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Fraser Coast	649,000	-8.1%	n/p	n/p
Queensland	40,683,000	0.0%	\$4,340.1m	-2.0%
Australia	191,920,000	1.2%	\$20,443.8m	3.4%

Key domestic source markets to Fraser Coast

All Visitors	Visitors	Trend Chg %	Nights	Trend Chg %
Brisbane	214,000	9.8%	871,000	12.5%
Regional Qld	296,000	3.0%	937,000	-0.3%
Sydney	n/p	n/p	n/p	n/p
Regional NSW	55,000	8.0%	590,000	56.9%
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	21,781,000	4.9%	86,528,000	4.3%
NSW	31,575,000	8.2%	100,104,000	5.2%
Victoria	24,458,000	11.5%	70,423,000	9.2%
Australia	97,203,000	7.1%	350,911,000	4.8%
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,542,000	3.5%	38,416,000	3.8%
NSW	12,466,000	5.1%	42,854,000	2.8%
Victoria	10,592,000	9.9%	31,976,000	7.3%
Australia	39,295,000	6.0%	150,289,000	3.6%



International visitation Year Ending December 2017

International visitors to Fraser Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	139,000	1.5%	438,000	2.9%	3.2	0.0
VFR	10,000	27.7%	164,000	-11.7%	16.6	-7.4
Business	n/p	n/p	n/p	n/p	n/p	n/p
Total³	150,000	1.9%	705,000	-10.6%	4.7	-0.7

State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,684,000	4.3%	53,089,000	2.4%
NSW	4,158,000	7.4%	94,407,000	7.9%
Victoria	2,891,000	8.1%	66,238,000	5.2%
Australia	7,999,000	6.2%	264,673,000	4.9%

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,879,000	4.4%	23,706,000	5.5%
NSW	2,447,000	7.7%	28,553,000	7.4%
Victoria	1,546,000	5.3%	16,622,000	6.6%
Total	4,447,000	5.0%	83,978,000	4.2%



Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
UK	34,000	-9.0%	139,000	-30.9%
Germany	31,000	13.3%	106,000	-6.6%
Scandinavia	9,000	-2.8%	28,000	-12.0%
NZ	n/p	n/p	n/p	n/p
France	8,000	-1.7%	36,000	61.7%
Netherlands	8,000	31.9%	26,000	72.3%
USA	n/p	n/p	n/p	n/p
Switzerland	7,000	-4.3%	19,000	3.8%
Canada	n/p	n/p	n/p	n/p
Italy	n/p	n/p	n/p	n/p

For technical reasons, some data may not be publishable (n/p), however the markets will still appear in order.

Top 10 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
UK	32,000	-9.5%	84,000	-31.0%
Germany	30,000	10.5%	81,000	2.3%
Scandinavia	9,000	-7.1%	24,000	-24.1%
Netherlands	8,000	31.9%	22,000	48.4%
France	7,000	-13.7%	32,000	47.3%
Switzerland	7,000	-4.5%	19,000	3.7%
Canada	n/p	n/p	n/p	n/p
USA	n/p	n/p	n/p	n/p
NZ	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>

Disclaimer:

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Year Ending December 2017

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	6,485,000	7.7%	19,628,000	7.1%	3.0	0.0	27%	39%	26%	30%
Gold Coast	4,005,000	8.1%	14,510,000	8.1%	3.6	0.0	53%	32%	11%	18%
Sunshine Coast	3,391,000	0.0%	12,300,000	-0.3%	3.6	0.0	54%	35%	7%	16%
Fraser Coast*	675,000	4.5%	2,939,000	6.8%	4.4	n/p	53%	34%	10%	3%
Southern Qld Country	1,956,000	4.6%	5,532,000	-2.0%	2.8	-0.2	30%	38%	24%	9%
SGBR	2,001,000	1.8%	7,099,000	-11.9%	3.5	-0.6	32%	30%	26%	9%
Mackay*	827,000	2.1%	3,843,000	11.0%	4.6	n/p	19%	20%	52%	4%
Whitsundays*	545,000	5.3%	2,520,000	5.1%	4.6	n/p	54%	16%	26%	3%
Townsville	1,074,000	-7.7%	3,599,000	-13.4%	3.3	-0.3	32%	25%	31%	5%
Outback*	878,000	9.7%	3,906,000	9.2%	4.4	n/p	29%	19%	42%	4%
TNQ	1,819,000	-4.2%	9,120,000	-2.3%	5.0	0.1	52%	22%	20%	8%
Total Domestic	21,781,000	4.9%	86,528,000	4.3%	4.0	0.0	39%	34%	22%	-

* 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	1,274,000	6.7%	25,683,000	5.0%	20.2	-0.3	55%	28%	9%	47%
Gold Coast	1,069,000	4.1%	9,691,000	0.2%	9.1	-0.3	80%	15%	3%	40%
Sunshine Coast	301,000	3.4%	3,068,000	7.2%	10.2	0.4	78%	19%	3%	11%
Fraser Coast	150,000	1.9%	705,000	-10.6%	4.7	-0.7	92%	7%	0%	6%
Southern Qld Country*	48,000	2.9%	1,332,000	-0.4%	28.0	n/p	45%	38%	11%	2%
SGBR	151,000	6.1%	2,632,000	26.9%	17.4	2.9	78%	13%	6%	6%
Mackay*	50,000	3.9%	411,000	-11.5%	8.3	n/p	76%	15%	4%	2%
Whitsundays	241,000	-2.8%	1,256,000	-23.9%	5.2	-1.4	97%	2%	1%	9%
Townsville	147,000	14.3%	1,340,000	-17.5%	9.1	-3.5	81%	13%	3%	5%
Outback*	21,000	-10.5%	481,000	-12.8%	22.5	n/p	69%	15%	9%	1%
TNQ	897,000	-0.4%	6,468,000	-2.1%	7.2	-0.1	94%	4%	2%	33%
Total International	2,684,000	4.3%	53,089,000	2.4%	19.8	-0.4	70%	24%	7%	-

Notes/Sources:

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.

In 2014, TRA moved to a new methodology for the NVS that included mobile phone interviewing as part of a dual frame overlap survey. This initiative was part of TRA's continuous improvement program. The inclusion of mobile phone users ultimately delivers greater domestic tourism data accuracy as it better reflects the Australian resident population and phone ownership.

The 2014 and 2015 NVS data, including the data for the year ending June 2016, has been back-cast by TRA.

Please visit tra.gov.au for more information on the methodology, back-casting process and impact on results.

'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.