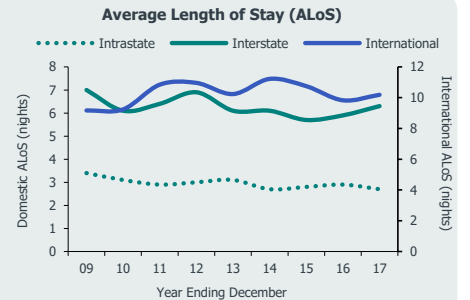
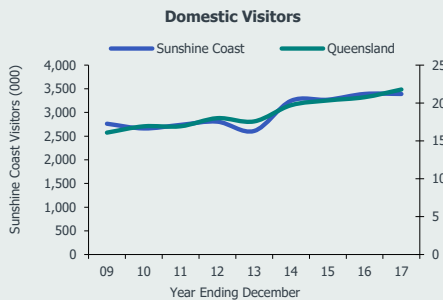


Year Ending December 2017



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	3,391,000	1,842,000	1,178,000	248,000	\$2,045.5m
Annual % change ¹	0.0%	-5.4%	9.1%	7.8%	-3.5%
3-yr trend % change ²	1.5%	-0.3%	4.3%	5.0%	1.1%
International Overnight	301,000	235,000	58,000	8,000	\$238.2m
Annual % change	3.4%	1.5%	13.8%	58.6%	-10.8%
3-yr trend % change	6.1%	6.9%	4.4%	4.9%	2.7%
TOTAL	3,692,000	2,076,000	1,236,000	256,000	\$2,283.7m
Annual % change	0.2%	-4.7%	9.3%	8.9%	-4.3%
3-yr trend % change	1.8%	0.4%	4.3%	5.0%	1.3%

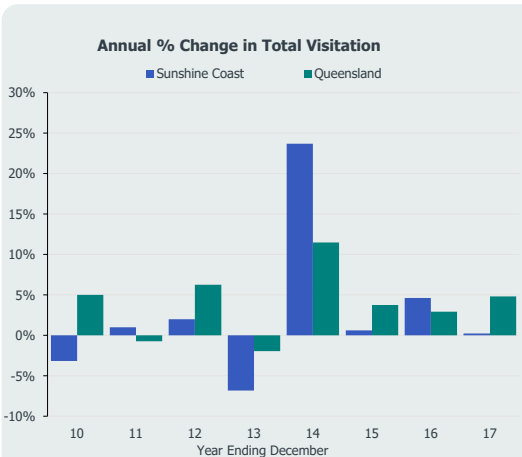


Domestic Visitors

- Domestic visitation to the Sunshine Coast region was stable at 3.4m visitors in the year ending December 2017. The domestic market represented 92% of overnight travellers and 90% of overnight expenditure in the region.
- The intrastate market accounted for three quarters (75%) of all domestic visitors to the Sunshine Coast region. Intrastate visitation was stable overall, however the region's largest source market, Brisbane, grew by 3.0% to 1.6m. Brisbanites represented just under half (48%) of all domestic overnight visitors in the Sunshine Coast region.
- The interstate market was also relatively stable (down 1.1%) during the same period. There was a 6.4% increase in visitors from Melbourne which offset a 4.9% decline in visitation by Sydneysiders.
- While visitor numbers were stable overall, the region saw more visiting friends and relatives (VFR) and business visitors, but fewer holiday travellers. VFR travel was up by 9.1% to 1.2m, the business sector grew 7.8% to 248,000, while holiday visitation declined 5.4% to 1.8m. The decline in holiday travel was seen in both the intrastate and interstate markets.
- The shift towards more VFR travellers (up from 24% to 29% of nights) may be driving a decline in spend per night as these visitors traditionally spend less per night than holiday and business visitors. Overall spend per night declined by 3.2% to \$166 per night.
- Consequently, overnight visitor expenditure declined by 3.5% to \$2.0bn.

International Visitors

- International visitation to the Sunshine Coast region grew by 3.4% to a record high of 301,000 in the year ending December 2017.
- Western markets remained the primary source of international visitation to the region, representing 86% of visitation. Despite a slight decline in visitation, down 2.2% to 65,000, New Zealand continued to be the largest international market. The UK was close behind as the second largest market, with visitation up by 3.2% to 60,000.
- Overall visitation from Asian markets was up 4.0% to 25,000 visitors.
- Holiday travel dominated international visitation to the region, accounting for almost four in five (78%) travellers and growing by 1.5% to a record high 235,000 in the year ending December 2017.
- While their visitation was up, holidaymakers shortened their stays slightly by 0.3 of a night. On the flip side, VFR visitors stayed half a night longer on average. These changes, combined with strong visitation growth in the VFR market, meant that VFR travel was the key driver of nights growth in the region, up 7.2% to 3.1m.
- The extra nights from the traditionally lower-spending VFR market may have contributed to a 16.8% decrease in visitor spend per night. Consequently, international visitor expenditure declined by 10.8% to \$238.2m.



In late March 2017, Cyclone Debbie and subsequent flooding interrupted tourism operations in several tourism regions, including the Sunshine Coast. This may be related to fewer holiday visitors and 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 Sunshine Coast

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	1,842,000	-5.4%	7,874,000	-4.9%	4.3	0.0
VFR	1,178,000	9.1%	3,602,000	21.7%	3.1	0.4
Business	248,000	7.8%	468,000	-30.2%	1.9	-1.0
Domestic³	3,391,000	0.0%	12,300,000	-0.3%	3.6	0.0
Intrastate						
Holiday	1,377,000	-3.6%	4,379,000	-8.8%	3.2	-0.2
VFR	876,000	6.2%	2,021,000	17.8%	2.3	0.2
Business	193,000	6.7%	353,000	-33.0%	1.8	-1.1
Intrastate	2,550,000	0.3%	6,990,000	-4.8%	2.7	-0.2
Interstate						
Holiday	465,000	-10.3%	3,495,000	0.5%	7.5	0.8
VFR	303,000	18.3%	1,580,000	27.1%	5.2	0.3
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	841,000	-1.1%	5,310,000	6.4%	6.3	0.4

Domestic day trip visitors

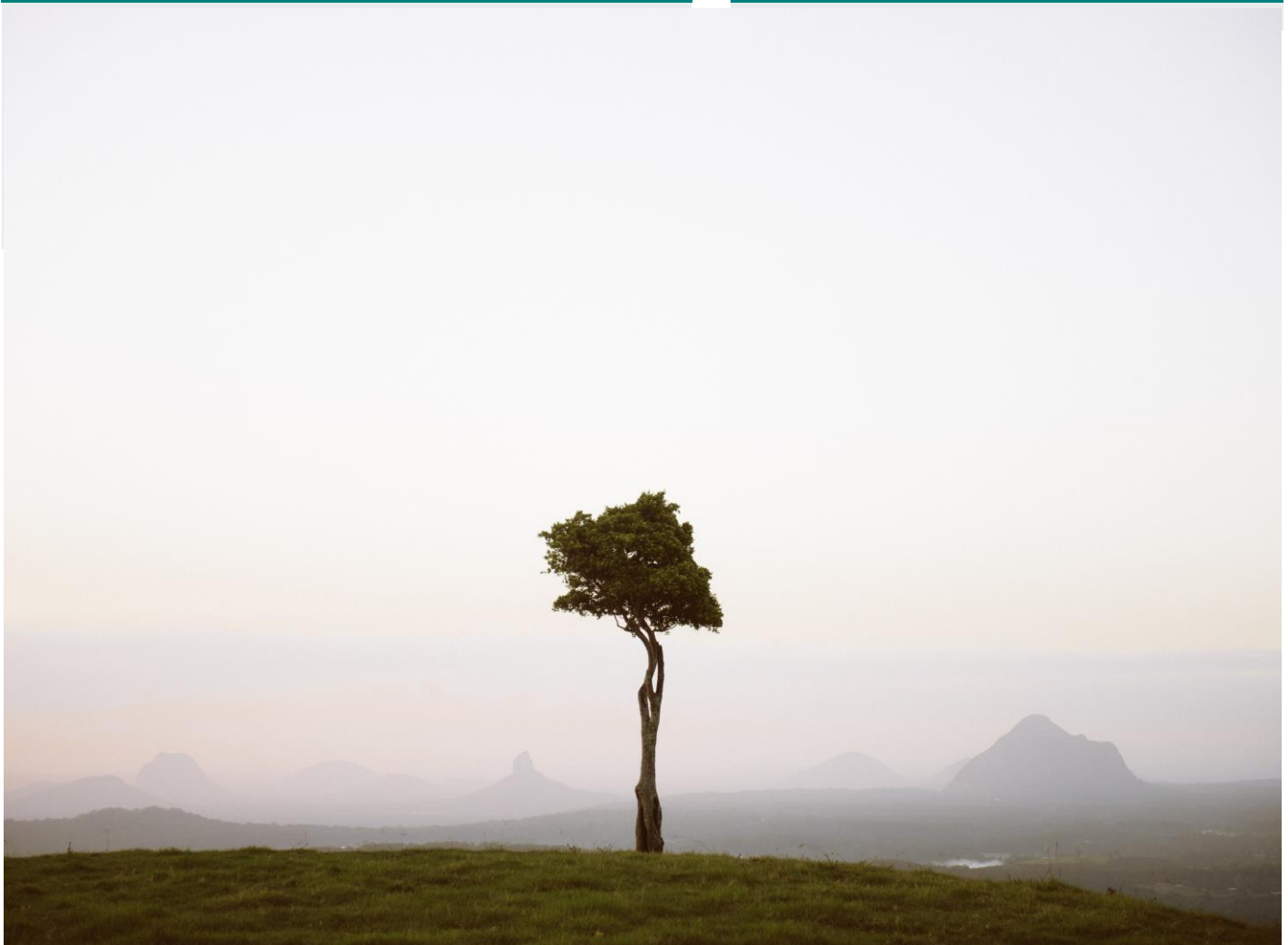
Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Sunshine Coast	6,245,000	6.3%	\$525.1m	-15.7%
Queensland	40,683,000	0.0%	\$4,340.1m	-2.0%
Australia	191,920,000	1.2%	\$20,443.8m	3.4%

Key domestic source markets to Sunshine Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	1,615,000	3.0%	4,393,000	-0.9%
Regional Qld	936,000	-4.0%	2,598,000	-10.7%
Sydney	214,000	-4.9%	1,101,000	-2.9%
Regional NSW	193,000	2.7%	1,134,000	36.0%
Melbourne	249,000	6.4%	1,630,000	-5.7%
Regional Vic	68,000	-5.5%	571,000	4.5%

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 Sunshine Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	235,000	1.5%	1,491,000	-3.1%	6.4	-0.3
VFR	58,000	13.8%	765,000	17.8%	13.3	0.5
Business	8,000	58.6%	60,000	56.1%	7.6	-0.1
Total³	301,000	3.4%	3,068,000	7.2%	10.2	0.4

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
NZ	65,000	-2.2%	568,000	-2.4%
UK	60,000	3.2%	532,000	25.6%
Germany	35,000	-2.8%	309,000	-17.8%
USA	19,000	-10.1%	190,000	21.3%
Scandinavia	15,000	11.0%	143,000	-0.6%
Canada	14,000	30.7%	131,000	8.3%
Switzerland	10,000	-7.3%	51,000	-44.0%
France	9,000	12.7%	93,000	54.4%
Netherlands	9,000	7.4%	43,000	-20.8%
Japan	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	49,000	-1.9%	259,000	9.6%
NZ	40,000	-7.3%	322,000	-14.0%
Germany	33,000	-1.3%	130,000	-43.9%
Scandinavia	14,000	10.4%	67,000	-7.6%
USA	13,000	-19.2%	70,000	14.9%
Canada	12,000	25.7%	66,000	-30.4%
Switzerland	9,000	7.6%	36,000	-13.8%
Netherlands	8,000	10.0%	32,000	-15.9%
France	8,000	5.3%	54,000	39.5%
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 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.