

# Sunshine Coast Regional Snapshot

## Year Ending December 2018



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
<b>Domestic Overnight</b>	<b>3,684,000</b>	<b>2,003,000</b>	<b>1,276,000</b>	<b>325,000</b>	<b>\$2,385.2m</b>
Annual % change <sup>1</sup>	▲ 8.6%	▲ 8.2%	▲ 8.3%	▲ 31.1%	▲ 16.6%
3-yr trend % change <sup>2</sup>	▲ 4.1%	▲ 2.3%	▲ 6.7%	▲ 14.8%	▲ 6.2%
<b>International Overnight</b>	<b>311,000</b>	<b>235,000</b>	<b>68,000</b>	<b>n/p</b>	<b>\$246.5m</b>
Annual % change	▲ 3.6%	▲ 2.4%	▲ 11.3%	n/p	▲ 4.8%
3-yr trend % change	▲ 7.6%	▲ 8.0%	▲ 7.5%	n/p	▲ 8.5%
<b>TOTAL</b>	<b>3,994,000</b>	<b>2,238,000</b>	<b>1,344,000</b>	<b>n/p</b>	<b>\$2,631.7m</b>
Annual % change	▲ 8.2%	▲ 7.6%	▲ 8.4%	n/p	▲ 15.4%
3-yr trend % change	▲ 4.4%	▲ 2.9%	▲ 6.7%	n/p	▲ 6.4%

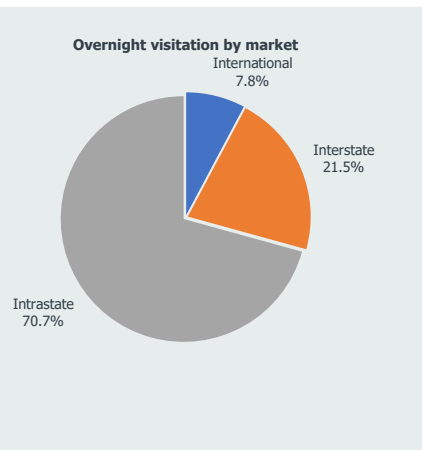
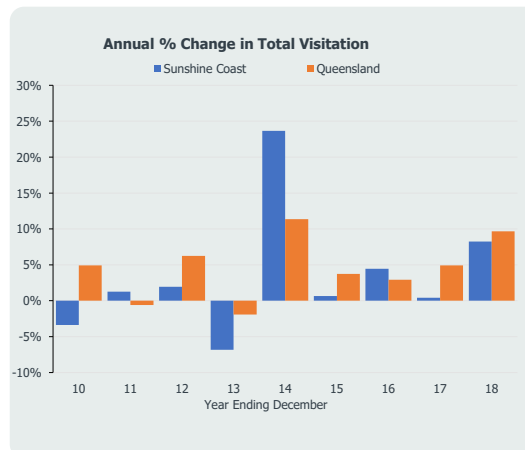


### Domestic Visitors

- Domestic overnight visitation to the Sunshine Coast region increased by 8.6% to a record 3.7m visitors in the year ending December 2018. The domestic market represented 92% of overnight travellers and 91% of overnight expenditure in the region.
- Overnight visitor expenditure increased by 16.6% to a record \$2.4bn. Expenditure grew faster than visitation as visitors spent more per night in the region, up 11.2% to \$185/night. On the other hand, visitor nights grew at a slower rate than visitation (up 4.8% to 12.9m) since the average length of stay (ALoS) was down slightly (by 0.1 of a night) over the year to 3.5 nights.
- Visitation grew to record levels across the main travel purposes. Holiday visitation increased by 8.2% to a record 2.0m, visiting friends and relatives (VFR) increased 8.3% to a record 1.3m and business travel grew by 31.1% to a record 325,000.
- The intrastate market represents 77% of domestic visitors to the Sunshine Coast region and was responsible for most of the growth in visitation over the year. Intrastate travel increased by 10.8% over the year to a record 2.8m. The region's largest intrastate market is Brisbane, up 12.7% to 1.8m.
- The interstate market grew by 2.2% during the same period to 859,000 visitors. New South Wales represents nearly half (48%) of interstate visitors to the region (413,000) and Victoria represents 34% (296,000).

### International Visitors

- International visitation to the Sunshine Coast region grew by 3.6% to 311,000 in the year ending December 2018.
- Total overnight visitor expenditure increased by 4.8% to \$246.5m. While spend per night grew by 16.0% to \$89/night, this was partially offset by a 9.6% decrease in total nights to 2.8m. Total nights decreased as visitors spent slightly less time in the region, with ALoS shortening by 1.3 nights to 8.9 nights.
- More than three quarters (76%) of all international travellers to the Sunshine Coast are on holiday and just under a quarter (22%) of travellers are VFR. Holiday visitation grew by 2.4% over the year to 235,000 while VFR visitation grew by 11.3% to 68,000.
- Western markets remained the primary source of international visitation to the region, representing 84% of visitation. North America was up 9.6% to 37,000 visitors, while visitation from European markets (including the UK) decreased by 4.1% to 153,000. Visitation from Eastern markets increased by 21.8% to 31,000 visitors.
- The Sunshine Coast's largest individual markets are New Zealand and the UK; visitation was up by 10.6% to 71,000 and 5.5% to 61,000 respectively for these markets.



**Accommodation**  
Average Daily Rate (ADR) for commercial accommodation in the region was up by 3.6% in the year ending December 2018 which may have contributed to the increased spend per night in both the international and domestic markets (Source: STR Global).

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

# Sunshine Coast Regional Snapshot

## Domestic visitation Year Ending December 2018

Domestic visitors to Sunshine Coast						
	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	2,003,000	8.2%	7,965,000	0.4%	4.0	-0.3
VFR	1,276,000	8.3%	3,753,000	4.2%	2.9	-0.1
Business	325,000	31.1%	990,000	111.6%	3.0	1.2
<b>Domestic<sup>3</sup></b>	<b>3,684,000</b>	<b>8.6%</b>	<b>12,896,000</b>	<b>4.8%</b>	<b>3.5</b>	<b>-0.1</b>
Intrastate						
Holiday	1,521,000	10.5%	4,702,000	7.4%	3.1	-0.1
VFR	994,000	13.6%	2,223,000	10.0%	2.2	-0.1
Business	248,000	28.7%	552,000	56.6%	2.2	0.4
<b>Intrastate</b>	<b>2,825,000</b>	<b>10.8%</b>	<b>7,614,000</b>	<b>8.9%</b>	<b>2.7</b>	<b>0.0</b>
Interstate						
Holiday	482,000	1.6%	3,263,000	-8.1%	6.8	-0.7
VFR	281,000	-7.0%	1,530,000	-3.2%	5.4	0.2
Business	n/p	n/p	n/p	n/p	n/p	n/p
<b>Interstate</b>	<b>859,000</b>	<b>2.2%</b>	<b>5,282,000</b>	<b>-0.5%</b>	<b>6.1</b>	<b>-0.2</b>

### Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Sunshine Coast	7,094,000	13.6%	\$685.5m	30.6%
Queensland	44,716,000	9.9%	\$5,208.8m	20.0%
<b>Australia</b>	<b>206,051,000</b>	<b>7.4%</b>	<b>\$22,526.1m</b>	<b>10.2%</b>

### Key domestic source markets to Sunshine Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	1,841,000	12.7%	4,882,000	9.9%
Regional Qld	984,000	7.4%	2,732,000	7.1%
Sydney	216,000	10.6%	982,000	-3.7%
Regional NSW	197,000	-7.0%	933,000	-23.2%
Melbourne	192,000	-8.0%	1,519,000	14.9%
Regional Vic	104,000	-4.2%	960,000	9.3%

### State comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	24,086,000	10.6%	94,732,000	9.5%
NSW	34,554,000	9.4%	107,413,000	7.3%
Victoria	25,687,000	5.0%	73,873,000	4.9%
<b>Australia</b>	<b>105,600,000</b>	<b>8.6%</b>	<b>376,087,000</b>	<b>7.2%</b>

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	9,426,000	9.8%	41,575,000	5.0%
NSW	13,648,000	9.0%	46,347,000	7.1%
Victoria	10,987,000	3.3%	32,481,000	0.6%
<b>Australia</b>	<b>42,364,000</b>	<b>7.6%</b>	<b>160,059,000</b>	<b>3.6%</b>



# Sunshine Coast Regional Snapshot

## International visitation Year Ending December 2018

### International visitors to Sunshine Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	235,000	2.4%	1,370,000	-5.4%	5.8	-0.5
VFR	68,000	11.3%	815,000	-1.5%	11.9	-1.5
Business	n/p	n/p	n/p	n/p	n/p	n/p
<b>Total<sup>3</sup></b>	<b>311,000</b>	<b>3.6%</b>	<b>2,778,000</b>	<b>-9.6%</b>	<b>8.9</b>	<b>-1.3</b>

### State comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,763,000	2.3%	55,052,000	3.7%
NSW	4,370,000	3.0%	96,204,000	2.4%
Victoria	3,039,000	5.4%	72,872,000	11.2%
<b>Australia</b>	<b>8,524,000</b>	<b>4.8%</b>	<b>273,793,000</b>	<b>3.8%</b>

Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,867,000	1.0%	22,708,000	-1.5%
NSW	2,479,000	3.3%	28,113,000	1.4%
Victoria	1,606,000	6.2%	16,697,000	3.8%
<b>Total</b>	<b>4,623,000</b>	<b>5.8%</b>	<b>82,392,000</b>	<b>1.1%</b>



### Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
New Zealand	71,000	10.6%	583,000	2.1%
United Kingdom	61,000	5.5%	491,000	-5.4%
Germany	30,000	-11.9%	207,000	-33.1%
USA	23,000	17.3%	187,000	-6.4%
Scandinavia	14,000	-5.1%	123,000	-12.5%
France	13,000	43.0%	74,000	-19.9%
Canada	13,000	-1.6%	96,000	-28.8%
Netherlands	9,000	-0.4%	67,000	61.9%
Switzerland	9,000	-8.9%	50,000	0.4%
China	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
United Kingdom	46,000	-1.0%	295,000	23.6%
New Zealand	46,000	18.4%	386,000	24.5%
Germany	29,000	-11.1%	123,000	-4.2%
USA	18,000	42.2%	87,000	22.8%
France	13,000	59.5%	65,000	21.7%
Scandinavia	13,000	-5.9%	41,000	-36.7%
Canada	9,000	-17.7%	46,000	-26.9%
Netherlands	8,000	-1.7%	32,000	4.8%
Switzerland	8,000	-11.3%	29,000	-16.7%
China	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](http://www.teq.queensland.com).

If you have any questions or comments, please email [research@queensland.com](mailto: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 December 2018

## 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	7,517,000	8.2%	21,883,000	5.8%	2.9	-0.1	29%	39%	24%	31%
Gold Coast	3,795,000	7.2%	14,664,000	9.0%	3.9	0.1	54%	28%	14%	16%
TNQ	2,065,000	13.5%	10,548,000	15.7%	5.1	0.1	51%	24%	21%	9%
<b>Sunshine Coast</b>	<b>3,684,000</b>	<b>8.6%</b>	<b>12,896,000</b>	<b>4.8%</b>	<b>3.5</b>	<b>-0.1</b>	<b>54%</b>	<b>35%</b>	<b>9%</b>	<b>15%</b>
SGBR	2,176,000	13.6%	8,286,000	22.8%	3.8	0.3	35%	25%	33%	9%
SQC	2,205,000	12.7%	5,893,000	6.5%	2.7	-0.2	27%	41%	24%	9%
Townsville	1,378,000	28.3%	4,797,000	33.3%	3.5	0.1	34%	30%	27%	6%
Outback *	884,000	3.1%	4,876,000	12.2%	5.5	n/p	35%	16%	45%	4%
Whitsundays *	651,000	11.8%	2,995,000	14.3%	4.6	n/p	62%	12%	25%	3%
Fraser Coast *	772,000	9.5%	3,135,000	11.7%	4.1	n/p	53%	33%	10%	3%
Mackay *	1,046,000	9.5%	4,133,000	13.4%	4.0	n/p	21%	21%	54%	4%
<b>Total Queensland</b>	<b>24,086,000</b>	<b>10.6%</b>	<b>94,732,000</b>	<b>9.5%</b>	<b>3.9</b>	<b>0.0</b>	<b>39%</b>	<b>33%</b>	<b>23%</b>	<b>100%</b>

\* Three-year trend change %<sup>2</sup>

## 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	1,400,000	6.3%	28,718,000	9.7%	20.5	0.6	52%	31%	10%	51%
Gold Coast	1,047,000	1.2%	10,021,000	7.8%	9.6	0.6	78%	15%	4%	38%
TNQ	863,000	-2.7%	6,288,000	-1.6%	7.3	0.1	91%	6%	3%	31%
<b>Sunshine Coast</b>	<b>311,000</b>	<b>3.6%</b>	<b>2,778,000</b>	<b>-9.6%</b>	<b>8.9</b>	<b>-1.3</b>	<b>76%</b>	<b>22%</b>	<b>2%</b>	<b>11%</b>
SGBR	146,000	-2.1%	1,710,000	-33.8%	11.7	-5.6	78%	15%	4%	5%
SQC *	56,000	7.7%	1,501,000	-3.0%	27.0	n/p	38%	33%	15%	2%
Townsville	136,000	-6.9%	1,264,000	-6.2%	9.3	0.1	85%	13%	2%	5%
Outback *	29,000	-0.2%	541,000	2.3%	18.5	n/p	71%	16%	6%	1%
Whitsundays	234,000	-1.1%	1,294,000	5.6%	5.5	0.4	96%	3%	0%	8%
Fraser Coast	130,000	-12.7%	510,000	-26.7%	3.9	-0.8	93%	6%	1%	5%
Mackay *	56,000	10.5%	418,000	-14.5%	7.4	n/p	77%	20%	4%	2%
<b>Total Queensland</b>	<b>2,763,000</b>	<b>2.3%</b>	<b>55,052,000</b>	<b>3.7%</b>	<b>19.9</b>	<b>0.3</b>	<b>68%</b>	<b>26%</b>	<b>8%</b>	<b>100%</b>

### Notes/Sources:

This release of year ending December 2018 data includes purpose-of-visit information and revisions to IVS estimates from 2005 to 2018. Please note results have been revised back to 2005 and are not to be used or compared to previously published data

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](http://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.