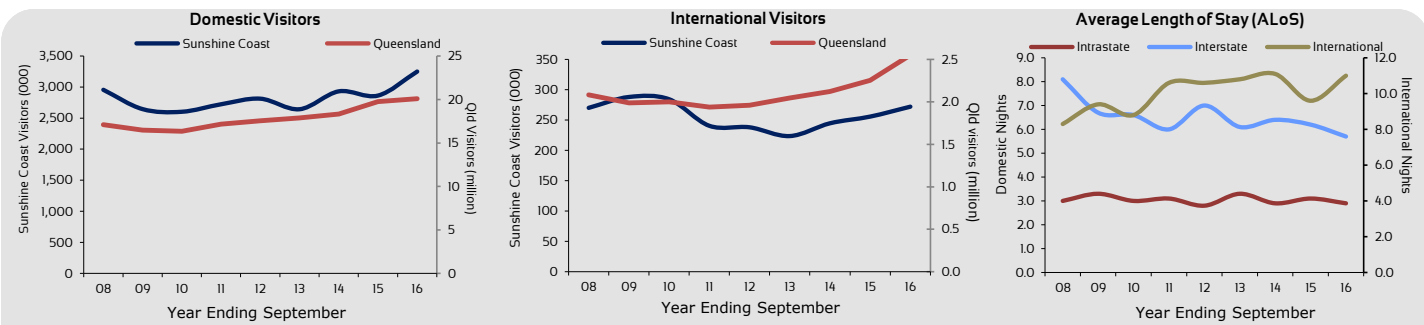


Year Ending September 2016



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic Overnight	3,250,000	1,925,000	1,026,000	208,000	\$2,063.04
Annual % change ¹	▲ 13.5%	▲ 19.6%	▲ 9.7%	▼ -9.6%	▲ 14.4%
Trend % change ²	▲ 7.2%	▲ 6.5%	▲ 7.9%	▲ 14.4%	▲ 2.5%
International Overnight	272,000	215,000	51,000	n/p	\$266.5m
Annual % change	▲ 6.4%	▲ 9.0%	▼ -2.6%	▲ n/p	▲ 45.2%
Trend % change	▲ 6.7%	▲ 7.3%	▲ 5.1%	▲ n/p	▲ 13.3%
TOTAL	3,522,000	2,140,000	1,077,000	n/p	\$2,329.6m
Annual change	▲ 12.9%	▲ 18.4%	▲ 9.1%	n/p	▲ 17.2%

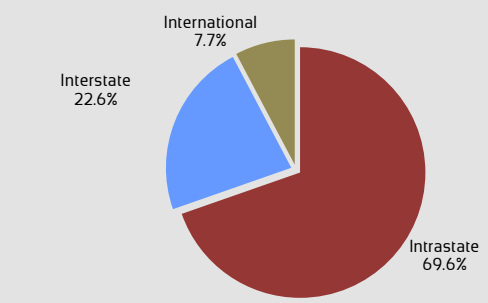
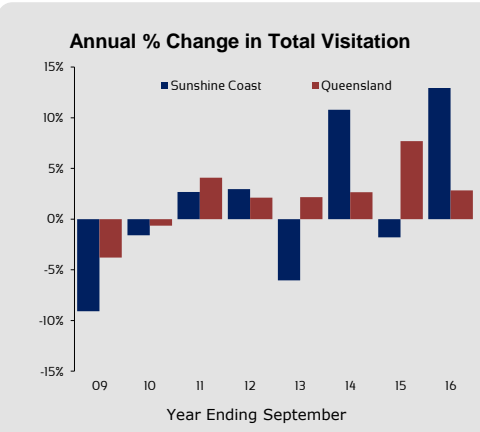


Domestic Visitors

- Domestic visitors to the Sunshine Coast increased by 13.5% in the year ending September 2016. The number of holiday visitors increased 19.6% and represented a 59.2% share of all domestic visitors to the Sunshine Coast.
- Interstate visitors to the Sunshine Coast grew by 23.2% and they made up 24.5% of all domestic visitors to the region. There was strong growth in Interstate holiday visitation (up 43.5%), while visiting friends and relatives (VFR) also saw moderate growth (up 6.5%). Business travel to the region was down 37.3%, but represented under 5% of interstate travel to the region.
- With 10.7% growth, the intrastate visitors from across Queensland contributed 75.5% of all domestic visitors to the region. Holiday visitation increased by 12.8%, while VFR was up 10.7%. Business travel was stable. The number of visitors from all Queensland regions grew. Brisbane remained the main source market, contributing 56.4% of all intrastate visitors, and was up 2.6% year on year. There was strong growth from the next two largest source markets, i.e. the Gold Coast and Southern Queensland Country.
- Domestic visitor nights on the Sunshine Coast grew by 7.7% in the year ending September 2016, however, the stronger growth in visitor numbers meant the average length of stay (ALoS) for domestic visitors to the Sunshine Coast declined slightly, from 3.8 to 3.6 nights.
- The increase in domestic visitors to the region saw overnight domestic visitor expenditure increase by 14.4% to \$2.1 billion.

International Visitors

- International visitors to the Sunshine Coast for the year ending September 2016 grew 6.4%, with the number of international holiday visitors increasing 9.0%. These holiday visitors accounted for 79.1% of all international visitors to the region.
- New Zealand was the largest source market for the Sunshine Coast in the year ending September 2016, with a share of 24.1%, and growth of 11.6%.
- The second largest international source market to the Sunshine Coast was the United Kingdom, with the number of overall visitors down by 9.7% to 54,000. Germany, the third largest source market, grew by 7.0%, while the USA grew by 44.1%, and was the Sunshine Coast's 4th largest source market.
- Visitors from all Asian source markets combined increased by 24.2%, with Chinese visitors being the main contributors to this growth.
- The ALoS for international visitors grew by 14.6% to 11.0 nights. Holiday visitors were the main driver, growing the ALoS by 27.9% to 7.8 nights. As a result, total international nights to the region increased by 21.3%.
- The combined effect of strong growth in nights and a growth in visitor numbers saw international overnight expenditure grow by 45.1% to reach a record high \$266.5 million.



Research Updates
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Domestic visitation Year Ending September 2016

Domestic Visitors to Sunshine Coast

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Domestic³	3,250,000	13.5%	11,757,000	7.7%	3.6	-0.2
Intrastate						
Holiday	1,414,000	12.8%	4,688,000	12.5%	3.3	0.0
VFR	797,000	10.7%	1,811,000	-1.7%	2.3	-0.3
Business	171,000	0.0%	474,000	-22.8%	2.8	-0.8
Intrastate	2,453,000	10.7%	7,203,000	4.8%	2.9	-0.2
Interstate						
Holiday	511,000	43.5%	3,382,000	35.8%	6.6	-0.4
VFR	229,000	6.5%	999,000	-17.2%	4.4	-1.2
Business	n/p	n/p	n/p	n/p	n/p	n/p
Interstate	797,000	23.2%	4,554,000	12.8%	5.7	-0.5

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure (\$) million	Year % Chg
Sunshine Coast	6,150,000	12.5%	\$580.7m	20.4%
Queensland	40,526,000	10.5%	\$4,330.8m	5.4%
Australia	187,735,000	7.4%	\$19,329.1m	1.5%

On a national level, daytrip visitation increased 7.4% to 187.7 million visitors in the year ending September 2016. By comparison, daytrips in Queensland increased 10.5%, Victoria increased 7.4%, while New South Wales increased 3.7%.

Key domestic source markets to Sunshine Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	1,383,000	2.6%	3,931,000	1.0%
Regional Qld	1,071,000	23.5%	3,272,000	9.8%
Sydney	222,000	20.0%	1,017,000	4.8%
Regional NSW	168,000	15.1%	668,000	-14.1%
Melbourne	223,000	43.9%	1,660,000	56.3%
Regional Vic	n/p	n/p	n/p	n/p

State Comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	20,091,000	1.6%	79,489,000	-1.5%
NSW	29,069,000	4.5%	94,129,000	4.4%
Victoria	21,671,000	2.3%	64,031,000	1.9%
Australia	89,447,000	4.8%	330,074,000	3.7%
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,128,000	7.7%	36,363,000	9.4%
NSW	11,850,000	8.0%	42,405,000	9.7%
Victoria	9,680,000	6.9%	29,824,000	6.5%
Australia	36,871,000	8.2%	143,977,000	9.3%

Total domestic overnight visitation continued to increase across all states in the year ending September 2016, which lead to national growth in domestic travel.



International visitation Year Ending September 2016

International Visitors to Sunshine Coast						
All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	215,000	9.0%	1,684,000	39.2%	7.8	1.7
VFR	51,000	-2.6%	664,000	-11.1%	13.0	-1.2
Business	n/p	▼	n/p	▼	n/p	▼
Total³	272,000	6.4%	2,983,000	21%	11.0	1.4

State Comparison - International				
All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,551,000	13.1%	53,087,000	5.0%
NSW	3,760,000	12.6%	87,071,000	5.6%
Victoria	2,630,000	13.3%	59,927,000	3.9%
Australia	7,348,000	11.7%	250,402,000	3.8%
Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,779,000	17.0%	22,720,000	10.0%
NSW	2,220,000	17.6%	26,687,000	9.5%
Victoria	1,458,000	20.7%	14,824,000	9.3%
Total	4,142,000	18.1%	80,415,000	8.0%

Top 10 international source markets				
Total	Visitors	Year % Chg	Nights	Year % Chg
NZ	66,000	11.6%	600,000	26.0%
UK	54,000	-9.7%	456,000	-9.9%
Germany	31,000	7.0%	358,000	96.1%
USA	20,000	44.1%	129,000	-6.2%
Scandinavia	12,000	-9.2%	123,000	47.8%
Canada	11,000	-2.2%	126,000	-12.8%
Switzerland	9,000	18.8%	80,000	46.5%
France	8,000	-33.9%	61,000	-69.5%
Netherlands	7,000	26.8%	45,000	37.5%
China	7,000	70.2%	53,000	-13.9%

These are the top 10 source markets for this period, ranked using total visitor numbers. Some markets may have been added to create natural groups such as 'Asia' and 'Europe' to provide a more complete picture. For technical reasons, some data may not be published, however the markets will still appear in order.

Holiday	Visitors	Year % Chg	Nights	Year % Chg
NZ	44,000	21.3%	428,000	58.4%
UK	44,000	-7.1%	211,000	-30.6%
Germany	30,000	12.2%	227,000	70.4%
USA	15,000	33.2%	54,000	18.8%
Scandinavia	10,000	-8.9%	70,000	19.9%
Canada	8,000	-10.9%	82,000	-4.2%
Switzerland	8,000	22.5%	35,000	79.2%
France	7,000	-23.6%	36,000	-18.1%
Netherlands	7,000	18.7%	36,000	76.8%
China	6,000	78.9%	26,000	-30.8%

The top 10 holiday visitor markets are similar to the total visitor markets above, however they are ranked using holiday visitor numbers. The same grouping and limitation of data applies.

The average length of stay of international holidaymakers in Queensland was 12.8 nights in the year ending September 2016. This result was more than both New South Wales (12.0 nights) and Victoria (10.2 nights). This represents a year on year decline of approximately 1 night in the average stay of international holiday travellers for Queensland, New South Wales and Victoria.



Regional Snapshots for all Queensland regions are available on the TEQ Research website, www.teq.queensland.com

Overview snapshots are also available for both Domestic and International visitors. Any questions or comments, please email research@queensland.com

The Sunshine Coast tourism region includes the Caloundra, Maroochy, Noosa, Gympie and Cooloolo regions.

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Year Ending September 2016

Domestic Regional Comparison

Total Visitors	% Proportion of Travel Purpose									
	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	5,815,000	5.3%	17,388,000	-0.8%	3.0	-0.2	28%	40%	24%	29%
Gold Coast	3,660,000	3.8%	13,326,000	-1.5%	3.6	-0.2	53%	33%	10%	18%
Sunshine Coast	3,250,000	13.5%	11,757,000	7.7%	3.6	-0.2	59%	32%	6%	16%
Fraser Coast	597,000	-4.3%	2,271,000	-9.2%	3.8	-0.2	51%	38%	7%	3%
Southern Qld Country	1,912,000	-4.2%	5,151,000	-14.9%	2.7	-0.3	29%	39%	24%	10%
Southern GBR	1,932,000	-0.3%	7,739,000	-0.1%	4.0	0.0	30%	30%	32%	10%
Mackay	733,000	-16.8%	2,767,000	-12.4%	3.8	0.2	21%	22%	49%	4%
Whitsundays	516,000	25.5%	2,199,000	-1.3%	4.3	-1.1	65%	19%	10%	3%
Townsville	1,131,000	11.2%	4,201,000	4.2%	3.7	-0.3	31%	31%	25%	6%
Outback	519,000	n/p	2,321,000	n/p	4.5	n/p	44%	22%	27%	3%
TNQ	1,875,000	-7.3%	9,384,000	-4.4%	5.0	0.1	50%	22%	24%	9%
Total Domestic	20,091,000	1.6%	79,489,000	-1.5%	4.0	-0.1	40%	34%	21%	-

International Regional Comparison

Total Visitors	% Proportion of Travel Purpose									
	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	1,183,000	9.6%	24,735,000	4.2%	20.9	-1.1	53%	29%	9%	46%
Gold Coast	1,014,000	16.2%	10,722,000	26.7%	10.6	0.9	80%	14%	3%	40%
Sunshine Coast	272,000	6.4%	2,983,000	21.3%	11.0	1.4	79%	19%	2%	11%
Fraser Coast	136,000	3.8%	657,000	17.2%	4.8	0.5	93%	5%	1%	5%
Southern Qld Country	44,000	-13.0%	1,350,000	-17.7%	30.6	-1.8	43%	32%	10%	2%
Southern GBR	133,000	-6.3%	2,209,000	-16.8%	16.7	-2.1	78%	14%	4%	5%
Mackay	43,000	2.7%	461,000	-35.0%	10.7	-6.2	71%	15%	6%	2%
Whitsundays	229,000	9.6%	1,513,000	3.0%	6.6	-0.4	97%	1%	1%	9%
Townsville	125,000	2.1%	1,624,000	4.7%	13.0	0.3	77%	14%	4%	5%
Outback	20,000	n/p	217,000	n/p	10.6	n/p	78%	9%	10%	1%
TNQ	877,000	16.0%	6,613,000	-4.1%	7.5	-1.6	93%	4%	2%	34%
Total International	2,551,000	13.1%	53,087,000	5.0%	20.8	-1.6	70%	23%	6%	-

Notes/Sources:

In 2012, the 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 ASGS (Australian Statistical Geographic Standard). SA2's (Statistical Area 2) 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 conducted by Tourism Research Australia. 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.

'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.
3. This figure includes "Other" visitors.