September 2024

Coochin Creek, Queensland

Economic Needs Assessment

Prepared for Comiskey Group

Contents

Contents		2
Introduction		3
Executive Summary		4
1	Site Location	6
1.1.	Regional and Local Context	6
1.2.	Proposed Development Plan	9
2	Tourism	11
2.1.	Overview	11
2.2.	Data Review	12
2.3.	Tourism Strategies	15
2.4.	Summary	16
3	Caravan and Camping Trends	17
3.1.	Tourism Research Australia	17
3.2.	Caravan Industry Association of Australia	20
3.3.	Summary	22
4	Sunshine Coast LGA Supply and Demand for Caravan and Camping Sites	23
4.1.	Population Trends and Projections	23
4.2.	Caravan and Camping Sites	24
4.3.	Demand for Camping (Population)	29
4.4.	Demand for Camping (Tourism)	30
5	Needs Assessment	35
5.1.	Key Conclusions	35
5.2.	Supply and Demand Considerations	36
5.3.	Employment	37
5.4.	Adverse Impacts	39
References		40

Introduction

This report presents an independent assessment of the need and demand for a proposed Eco Park at Coochin Creek, a suburb in the south of the Sunshine Coast Local Government Area (LGA). The report also considers the likely economic impacts that would result from the proposed development. The proposal is referred to as the Coochin Creek Eco Park throughout the remainder of this report.

This report is structure and presented in five (5) sections as follows:

- **Section 1** outlines the regional and local context of the Coochin Creek Eco Park and provides a summary of the proposed development scheme.
- **Section 2** summarises key tourism data relating to the Sunshine Coast LGA, Sunshine Coast Tourism Region, and passenger numbers for the Sunshine Coast Airport.
- **Section 3** reviews trends in the camping and caravan industry based on industry research.
- **Section 4** details the current population of the Sunshine Coast LGA along with projections over the period to 2046. The section also outlines the current supply of caravan and camping sites in the Sunshine Coast LGA, projecting current and future demand based on both population growth and tourism growth.
- **Section 5** presents an analysis of need for the subject facility.

Executive Summary

The analysis in this report indicated there is a community and economic need for the proposed camping ground to be developed at the subject site reflecting:

i. The Sunshine Coast LGA is projected to grow significantly over the next 25 years. This will create demand from tourists visiting family and friends.

ii. The Sunshine Coast LGA is a major tourist market which is indicated to continue to grow rapidly in terms of visitor numbers.

iii. In addition, the Sunshine Coast Council is targeting significant growth in the tourism industry as evidenced by a number of strategic planning documents.

iv. Caravan and camping is a growing industry in Australia.

v. There is a very limited number of proposals for holiday parks in spite of indicated strong demand for such facilities, particularly in terms of providing diversity and choice (noting six key holiday parks on the Sunshine Coast are operated by the one group).

vi. The provision of camping facilities in Sunshine Coast LGA is well below comparable Australian averages.

vii. Upon investigation, many of the existing camping grounds/caravan parks are well patronised in peak periods. Evidence of occupancy rates for accommodation facilities indicates increasing occupancy and growing Average Daily Rates (ADRs). These are indicators of need.

viii. The subject site will be able to cater to a wide range of caravan types including recreational vehicles and 5-wheelers.

ix. In a rapidly growing area, there is need for a range of accommodation facilities including caravan parks/campgrounds.

x. The proposal would add to diversity and choice of facilities.

xi. The proposed site is well located to a range of tourist/recreation facilities including adjoining recreation facilities associated in close proximity to Moreton Bay Marine Park and Bribie Island National Park. A boat ramp at the nearby Coochin Creek attracts a high level of visitor activity.

xii. The subject site is well located to existing and proposed infrastructure, recognised by the existing approval.

xiii. The development of the Coochin Creek Eco Park would result in a positive economic benefit to the local community, providing a facility which is appropriate in its size and location.

xiv. The proposal will not impact on the continued operation of other camping grounds or caravan parks.

xv. From an economic point of view, the subject development is of a type and scale appropriate for the prevailing nature of the area and the circumstances of the site and its surrounds given it is limited in size, will not allow permanent residents and is close to nearby infrastructure.

There are also a number of significant adverse economic impacts if the subject proposal does not proceed including:

i. Loss of employment in a key industry.

ii. Loss of opportunity for diversity and choice of accommodation facilities, with only one proposal for new holiday parks along the coastline, and with existing holiday parks on the Sunshine Coast concentrated in the ownership of one group. Additionally, there are limited holiday parks in the Sunshine Coast LGA that currently include the range of onsite leisure facilities proposed at the Coochin Creek site.

iii. Loss of opportunity to reinforce the Sunshine Coast as a key tourist destination, renowned for its stunning beaches, scenic coastal walks, and proximity to nearby attractions like Mount Coolum, the Sunshine Coast Hinterland, and various national parks.

iv. Lack of alternate sites to incorporate the development on the Sunshine Coast, particularly in coastal areas.

1 Site Location

This section of the report outlines the regional and local context of the Coochin Creek site and provides a summary of the proposed development scheme.

1.1. Regional and Local Context

i. Coochin Creek is a suburb within the Sunshine Coast Local Government Area (LGA), located some 65 km to the north of the Brisbane Central Business District (CBD) and the 25 km to the south of Maroochydore (refer Map 1.1).

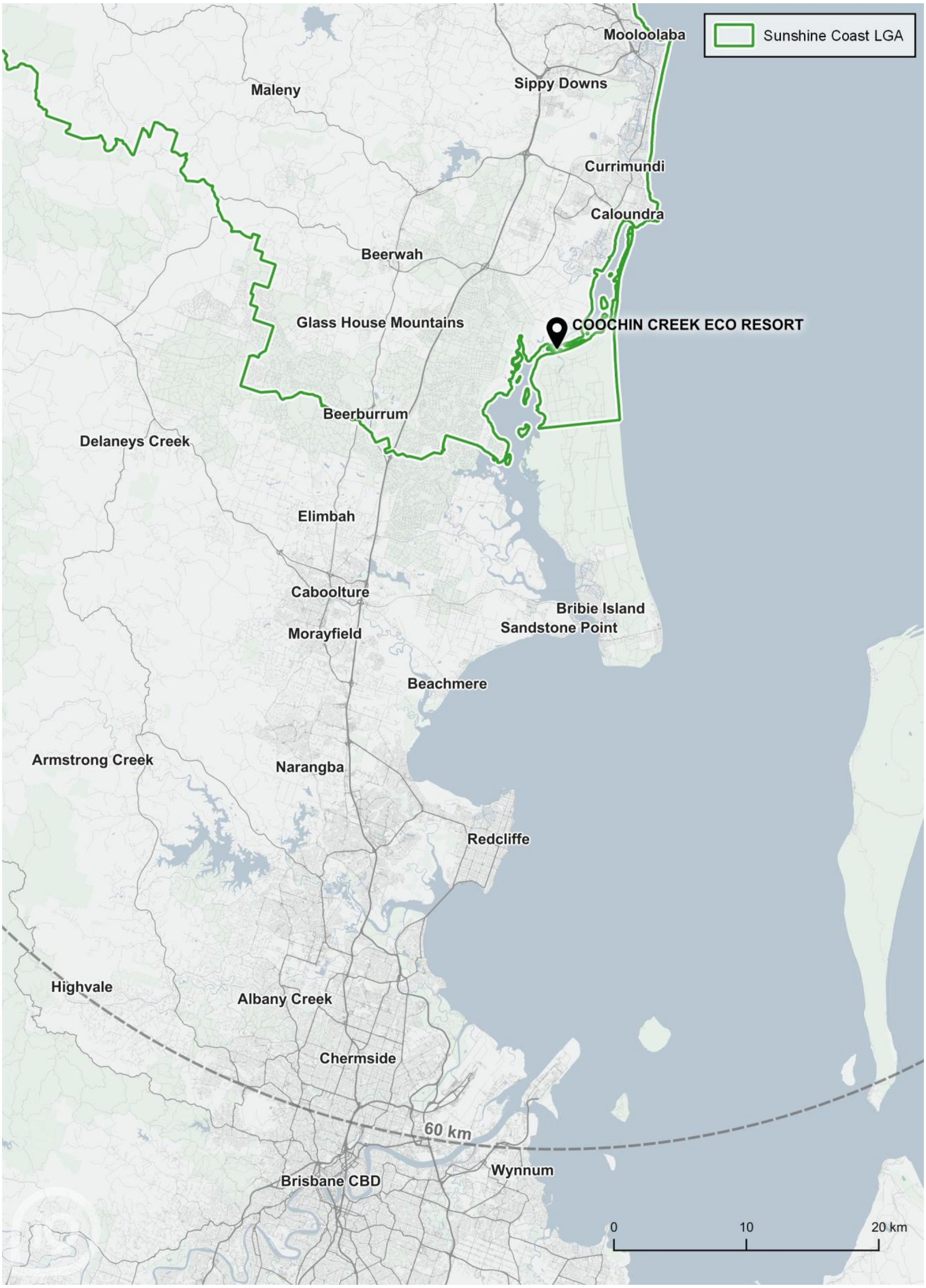
ii. The Sunshine Coast municipality is one of the fastest growing areas in South-East Queensland, with a current population of almost 366,000 persons, projected to increase to 565,700 persons by 2046. The Sunshine Coast is also a key tourist destination, renowned for its stunning beaches, scenic coastal walks, and proximity to nearby attractions like Mount Coolum, the Sunshine Coast Hinterland, and various national parks.

iii. Coochin Creek is a coastal location at the southern end of the Sunshine Coast comprising limited development. Uses generally include pine tree plantations in inland areas with coastal areas retaining their natural state. A limited amount of land has also been prepared for agricultural uses.

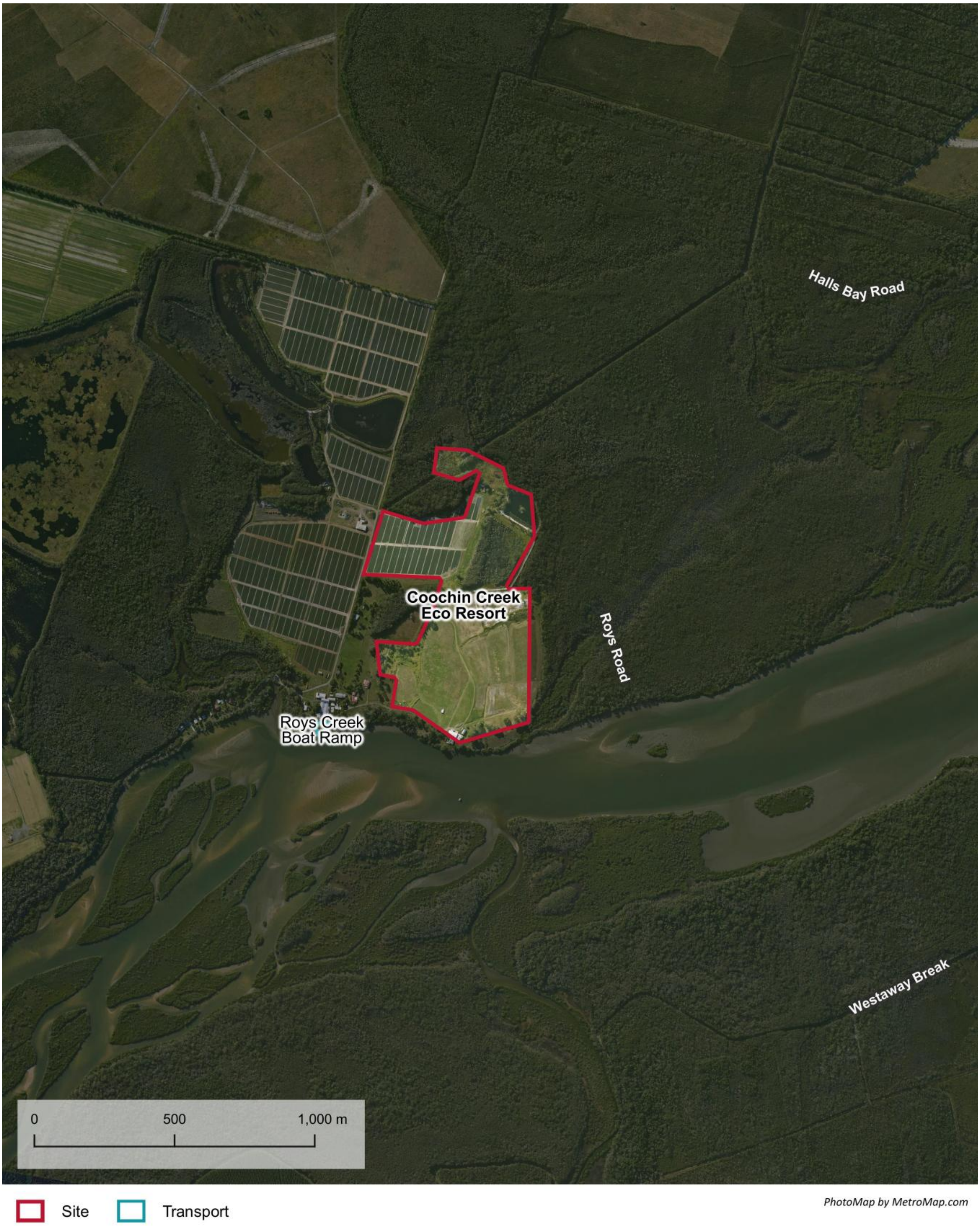
iv. The proposed Coochin Creek Eco Park site is located at Lot 10 SP132272 and Lot 6 SP184133. Both lots in combination comprise some 43.1 hectares. The site is located in close proximity to Moreton Bay Marine Park and Bribie Island National Park. A boat ramp at the nearby Coochin Creek (refer Map 1.2) attracts a high level of visitor activity.

v. Overall, the subject site is in a limited development area, with many natural features attractive to active outdoor activities.

MAP 1.1. COOCHIN CREEK REGIONAL CONTEXT



MAP 1.2. COOCHIN CREEK LOCAL CONTEXT



1.2. Proposed Development Plan

i. The proposal is to establish an Eco Park comprised of 75 camp sites, 75 cabins and a communal amenity building. The subject site is contained in the Rural Zone and previously operated as a strawberry farm. Tourist Park is a potentially consistent use in the Rural Zone. The site currently has an approval for Nature Based Tourism with 100 caravan and camping sites.

ii. Figure 1.1 outlines the plan for the proposed development. Key points to note include:

- The cabins are provided at the western part of the site and include 38 three bed, 27 two bed and 10 one bed cabins.
- There is also a small provision of cabins at the southern end of the camp sites which are provided on the eastern part of the site.
- A car park and reception centre of 1,000 sq.m are provided to the south.
- A range of leisure activities are centrally located between the cabins and camp sites, including a pool, waterplay park, indoor recreation, putt putt, jumping pillow, basketball, tennis and pickleball.

iii. Overall, the proposed development offers a range of accommodation options and leisure activities onsite and is close to additional off site facilities which are consistent with a camping/caravan experience, such as a boat ramp.

iv. The proposed Eco Park would not accommodate permanent residents and only allow short-term visitors (i.e. tourists).

FIGURE 1.1. COOCHIN CREEK DEVELOPMENT PLAN

2 Tourism

This section of the report summarises key tourism data relating to the Sunshine Coast Local Government Area (LGA), Sunshine Coast Tourism Region, and passenger numbers for the Sunshine Coast Airport.

2.1. Overview

i. Coochin Creek forms part of the broader Sunshine Coast tourism region which also includes Noosa to the north. The Sunshine Coast includes several tourist destinations such as Maroochydore, Gympie, Eumundi, Kawana, Coolum Beach, Nambour, Mooloolaba and The Hinterland.

ii. The Sunshine Coast has a large tourist market and is one Queensland's most popular tourist destinations, particularly amongst domestic tourists. As shown in Table 2.1, the Sunshine Coast recorded 4.16 million domestic visitors in the year-ending March 2024 – the most of any region, other than Brisbane. This is equivalent to a 16.7% share of all domestic tourism to Queensland. Notably, 'holiday' is the most popular reason domestic visitors travel to the Sunshine Coast, with more domestic tourists travelling to the Sunshine Coast for a holiday than any other region, including Brisbane.

iii. The Sunshine Coast recorded around $4.2 billion in tourism spending over the 12 months to March 2024, which reflected a 38.3% increase over 2019. This included some 4.5 million visitors (up 2.1% over 2019) that stayed a combined 19.56 million nights. These visitor nights (when divided by 365 days) are equivalent to an additional 'resident' population of some 54,000 persons.

iv. Like all tourist regions across Australia, the Sunshine Coast has been significantly impacted by the pandemic, most notably through lost income from international tourism.

v. Prior to the COVID-19 pandemic, interstate visitation reached a record 1.1 million in the year to December 2019, growing some 29.2% from the previous year. This is significantly higher than international visitation which was up by 6.2% from the previous year to 330,000. Domestic visitors are more likely to utilise campgrounds, compared with international visitors who will likely spend more on accommodation at a higher price point.

TABLE 2.1. QUEENSLAND REGIONS TOURISM SNAPSHOT, MARCH 2024

Region	Total Visitors	Reason For Visit Holiday	VFR*	Business	Holiday (%)	VFR (%)	Business (%)
Brisbane	7,234,000	2,242,540	2,748,920	1,808,500	31%	38%	25%
Sunshine Coast	4,157,000	2,452,630	1,330,240	290,990	59%	32%	7%
Gold Coast	4,081,000	2,244,550	1,142,680	612,150	55%	28%	15%
Queensland Country	2,886,000	923,520	1,010,100	779,220	32%	35%	27%
Tropical North Queensland	2,283,000	1,232,820	456,600	479,430	54%	20%	21%
Southern Great Barrier Reef	1,776,000	728,160	532,800	408,480	41%	30%	23%
Townsville North Queensland	1,199,000	647,460	239,800	251,790	54%	20%	21%
Mackay	1,113,000	255,990	189,210	589,890	23%	17%	53%
Outback Queensland	859,000	206,160	188,980	395,140	24%	22%	46%
Whitsundays	722,000	469,300	129,960	115,520	65%	18%	16%
Fraser Coast	891,000	454,410	231,660	196,020	51%	26%	22%

Source: Tourism & Events Queensland (March 2024)
**VFR: Visiting Friends and Relatives*

2.2. Data Review

Sunshine Coast LGA

i. Table 2.2 provides a snapshot of visitation to the Sunshine Coast LGA for year ending 2019 (the most recent pre-pandemic data available). As shown, total visitation reached 7.26 million, including 4,840 million domestic day trippers (66.6%), 2.28 million domestic overnight visitors (31.4%) and 140,000 international visitors (1.9%).

ii. Total expenditure from tourists to the Sunshine Coast LGA was around $2 billion in 2019 with these visitors staying for a combined 9.4 million nights. Dividing 9.5 million visitor nights by the number of days in a year (365) means that domestic overnight and international visitors are the equivalent of an additional 26,000 permanent residents, or around 7.4% of the Sunshine Coast LGA population.

iii. The Sunshine Coast is an easily accessible tourist destination for the large resident population provided to the immediate south within Greater Brisbane. Maroochydore is around a 1 hour 30 minute drive from the Brisbane Central Business District (CBD). It is estimated that tourist spending accounts for a substantial proportion of retail sales. For facilities located close to the main Central Business Area (CBA) at Maroochydore, the proportion of sales from beyond the Sunshine Coast region is as high as 20% - 30%. Tourists typically spend on a range of items including food catering, giftware and souvenirs and apparel.

TABLE 2.2. SUNSHINE COAST LGA TOURISM SNAPSHOT, 2019

Category	Domestic Day Trippers	Domestic Overnight	International	Total Visitors
Visitors ('000)	4,840	2,284	140	**7,264**
Visitor Nights ('000)	n.a.	7,693	1,699	**9,392**
Expenditure ($M)	453	1,367	140	**1,960**
Average length of stay (nights)	n.a.	3.4	12.1	**n.a.**
Average expenditure per visitor ($)	n.a.	599	1000	**270**
Average expenditure per night ($)	n.a.	178	82	**160**

Source: Tourism Research Australia for Sunshine Coast LGA, Dec 2019

Sunshine Coast Tourism Region

i. Although not directly comparable, the best indicator of future visitors to the Sunshine Coast is data prepared by Tourism and Events Queensland for the Sunshine Coast tourist region which is outlined in Table 2.3. This is a much larger region than the Sunshine Coast LGA (including Noosa, Gympie, Eumundi, Kawana, Coolum Beach, Nambour, Mooloolaba and The Hinterland) with data provided for the year to March 2024.

ii. Some 10.9 million people visited the Sunshine Coast, with international tourists making up a larger proportion at 2.9%. Domestic day trippers are still the largest cohort at 59%. The average stay for domestic overnight visitors is 3.2 days with international visitors staying significantly longer at 16.2 days.

TABLE 2.3. SUNSHINE COAST TOURISM REGION TOURISM SNAPSHOT, MARCH 2024

Category	Domestic Day Trippers	Domestic Overnight	International	Total Visitors
Visitors ('000)	6,429	4,157	311	**10,897**
Visitor Nights ('000)	n.a.	14,529	5,034	**19,563**
Expenditure ($M)	844.1	4,188	371.1	**5,403**
Average length of stay (nights)	n.a.	3.5	16.2	**n.a.**
Average expenditure per visitor ($)	n.a.	1,007	1193	**496**
Average expenditure per night ($)	n.a.	288	74	**233**

Source: Tourism and Events Queensland, March 2024

Sunshine Coast Airport

i. An indicator of future visitor numbers to the Sunshine Coast LGA is to consider time series patterns in passenger movements to the Sunshine Coast Airport.

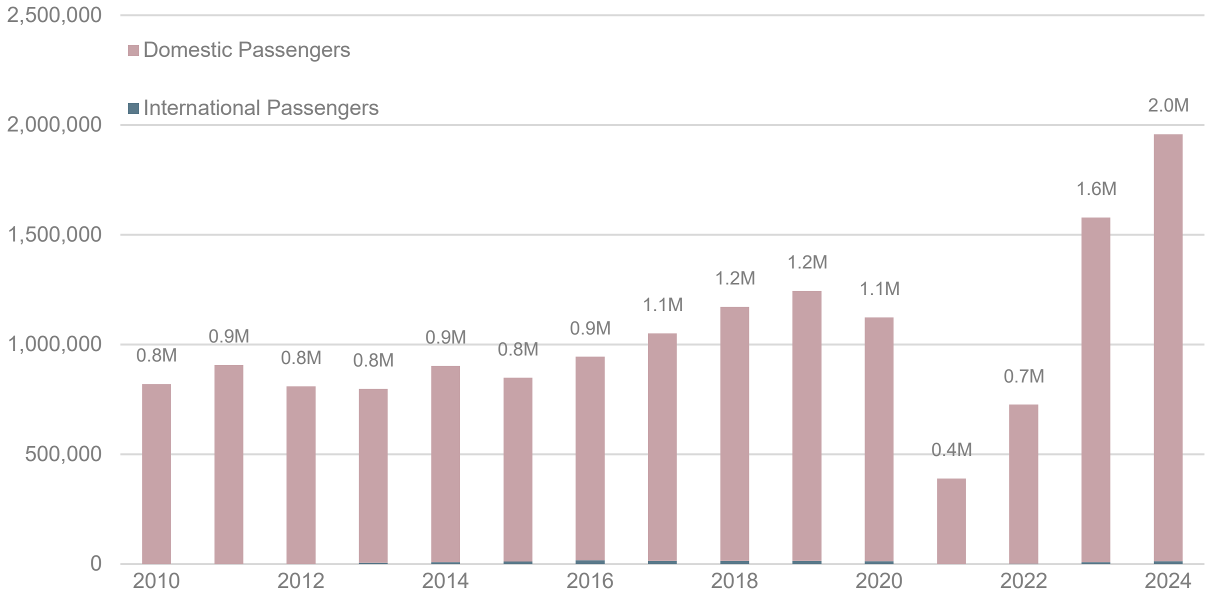
ii. As shown in Chart 2.1, Sunshine Coast Airport movements have rebounded strongly and now sit some 57% higher than 2019 (pre-COVID-19 levels):

- Domestic passenger movements totalled 1.23 million in 2019 (year to March), as compared with 1.95 million in 2024.

- International passenger movements make up a fraction of total passenger movements, at less than 1% in 2024. This is in line with pre-COVID-19 levels. The year with the most international passenger movements was 2016 with around 17,000. International passenger movements have generally been in the order of 12,000 – 14,000 in non-COVID-19 impacted years.

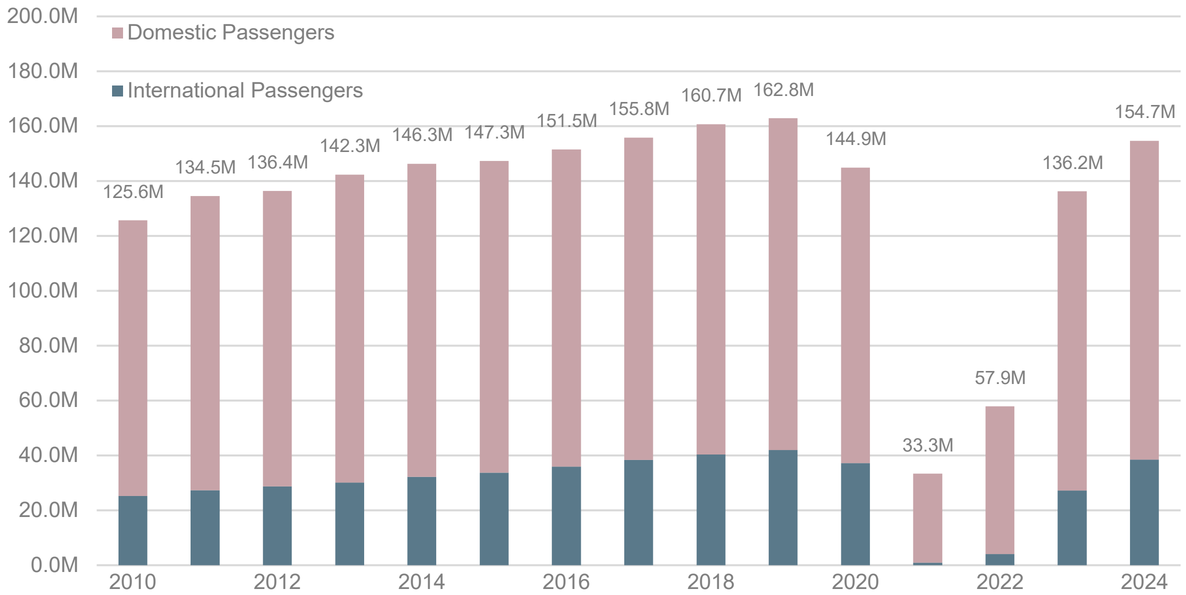
iii. There has been significant growth in overall passenger numbers into the Sunshine Coast airport, driven by domestic passenger movements. It is unlikely that tourists travelling to the area by private transport and staying at campgrounds would have experienced equally high growth, although there has generally been a structural shift towards domestic tourism post-COVID-19, with outbound international travellers still below pre-COVID-19 levels (refer Chart 2.3).

CHART 2.1. SUNSHINE COAST AIRPORT MOVEMENTS, YEAR TO MARCH



Source: Bureau of Infrastructure and Transport Research Economics

CHART 2.2. COMBINED AUSTRALIAN AIRPORT MOVEMENTS, YEAR TO MARCH



Source: Bureau of Infrastructure and Transport Research Economics

2.3. Tourism Strategies

Sunshine Coast Destination Tourism Plan, 2020-2025

i. The Destination Management Plan was prepared by Urban Enterprise in collaboration with Visit Sunshine Coast (VSC). The report is to provide direction for the Sunshine Coast visitor economy from 2020 to 2025.

ii. In the executive summary of the report, it is noted that:

> *Across the Region, nature-based and outdoor experiences were identified as the primary product strengths, based on the range of iconic beaches along the coast and unique national and state parks across the hinterland. Other primary strengths include retail, events and festivals, and sport and recreation (including major attractions/theme parks).*
>
> *……..*
>
> *The Region has attracted little accommodation investment in recent years, in terms of upgrades to existing stock and provision of new accommodation to meet contemporary market demand. This has catalysed significant growth in private short-term holiday rentals (e.g. Air BnB), which provides over 5,000 properties and supports over 150,000 guests. Significant accommodation investment is required across the Region to improve the facilities, meet growth in overnight visitation and attract high-yielding markets. It has been estimated at least 4,746 additional rooms are required over the next ten years to meet future demand for commercial accommodation.*

iii. Under the heading of competitive advantages it is stated as follows:

> *When discussing the competitive advantages of the Sunshine Coast, it is not one single (or unique) product strength; but rather a collection of characteristics that make it a highly desirable destination. These include:*
>
> *• Accessibility and connectivity – ease of access from key source domestic and international markets.*
>
> *• Tourism hubs – multiple locations that have strong clusters of accommodation, hospitality services and tourism product.*
>
> *• Product rich – the number and quality of tourism product and experiences on offer.*
>
> *• Nature-based assets – high-quality and attractive nature-based assets.*
>
> *• Tourism services – a large resident workforce supports industry in providing tourism/hospitality services that caters to visitor needs.*
>
> *This set of destination attributes is the result of the Region having a combination of natural amenity (e.g.*
>
> *beaches and hinterland) and a significant population base (over 400,000 residents). Visitors can, therefore, experience the natural environmental features of the Region with all of benefits of service provision and infrastructure associated with a large urban centre.*

iv. A number of themes were identified in the report, with Theme 6 being Accommodation. The objective for accommodation is:

> *Improve and diversify the accommodation offer in the region matched to contemporary market demands and future visitation needs.*

v. It is noted under the heading of Project 19, "Investment in Additional Accommodation Facilities" that 38 additional accommodation establishments are required across a range of typologies, to improve the quality and diversity of accommodation stock and meet projected growth in visitor demand is required.

vi. More specifically, based on a gap analysis of accommodation stock, Table 14 (page 27 of the report) presented an analysis of projected accommodation needs by type, 2019 – 2029. It was recommended that there was need for a further six Holiday Park facilities, particularly for quality or branded holiday parks (with an indicative capacity of 250 rooms). The Sunshine Coast Hinterland and Coastal areas were indicated to account for three of the six establishments.

vii. The subject development is entirely consistent with this strategy as it provides a nature based holiday park of high quality that will be operated by an experienced group with local knowledge of the area.

Sunshine Coast Major Events Strategy 2018-2028 (2023 Refresh)

i. The Sunshine Coast Major Events Strategy 2018 – 2028 (2023 refresh) provides a 5 year framework which seeks to maximise the value of major events to the economy and to the region. The strategy has been developed by council in close consultation with the Sunshine Coast Events Board and informed through valuable contributions from the tourism and event industry and key regional partners.

ii. The foreword of the document indicates that:

> *The Sunshine Coast Major Events Strategy 2018-2028 – 2023 Refresh, continues to develop an expanded focus on the longer-term outcomes and benefits from successful event funding programs. The immediate economic and visitation impact of events will always be a prime measure of success for each project, however, an increase in the reputational, promotional and destination awareness potential of the events program continues to be a key target. In particular, building a plan to support and partner with events of varied scale, content and outcomes allows the region to create an annual overall impact across a range of targeted categories – including an expanded focus on environmental, cultural, accessible and artistic content that drives external regional perception and local community pride.*
>
> *This refreshed strategy sets a framework which will deliver the vision of the Sunshine Coast being recognised as the premier regional events destination in Australia — where major events deliver maximum results to the economy, communities and stakeholders.*

iii. The key to the above is that local council is continuing to plan for increased visitor activity through the provision of major events which will stimulate ongoing recognition of the Sunshine Coast as a key tourist destination.

2.4. Summary

i. The Sunshine Coast is a large and growing community that will continue to be attractive as a tourist destination. As a vital part of the economy, there is need for further accommodation facilities that will provide diversity of accommodation types and settings to meet various market segments.

ii. The subject site, already approved for accommodation use, is a logical economic location for expanded accommodation to meet the growing needs of the visitor market.

3 Caravan and Camping Trends

3.1. Tourism Research Australia

i. Tourism Research Australia reports caravan and camping data from the National Visitor Survey on their website.

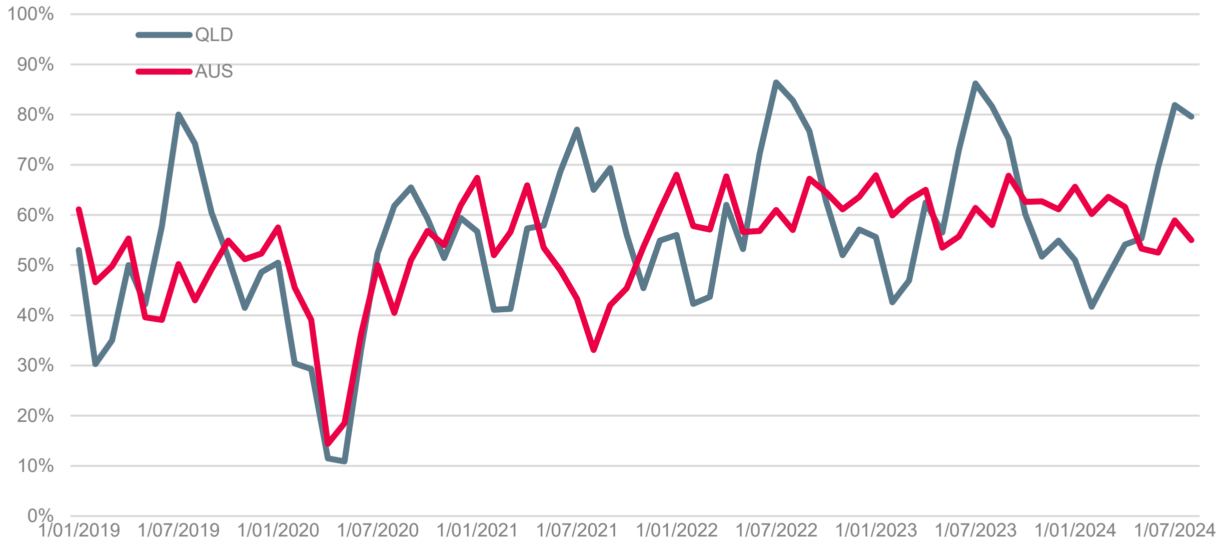
ii. Some of the key information includes:

- The number of caravan and camping trips grew by 67% in the decade before COVID-19.
- In the year ending 2019, Australians took 13.9 million caravan and camping trips which was an all-time record.
- Of these trips, commercial caravan parks and camping grounds accounted for 52% of trips, 62% of nights and 64% of spend.
- Numbers have recovered well since the COVID-19 related lockdowns and were 12.7 million by the year ending June 2022. Spend was at an all time high of $10.5 billion.
- There were over 900,000 total caravan and campervan registrations across the nation in 2024.
- Travellers spent 59.8 million nights on caravan and camping trips with 90% of nights in regional Australia and 10% of nights in metropolitan areas such as the Sunshine Coast.
- In the year ending December 2019, 78% of caravan and camping trips were holidaying, with a further 11% of trips were to visit friends and relatives, while 10% were for business/employment.
- In Queensland, caravan vehicle registrations peaked at 218,215 vehicles in 2024 – 27.1% of the nation's total. Registrations have increased from 118,730 in 2013.
- In Queensland, campervan vehicle registrations peaked at 28,171 vehicles in 2024. Registrations have more than doubled from 12,900 in 2013.
- In 2023, caravan and camping sites in Queensland accommodate 3.0 million visitors across 11.5 million nights. With a population of 5.35 million persons, this represents every Queensland resident camping some two nights per year.
- Occupancy rates for caravan and camping sites average between 40% – 80% over the course of the year with peak periods in June/July and lows in February. For the year ending March 2024, the average occupancy for caravan, camping and cabins was ~62%; 66% for on-site caravans and cabins; and 60%

for powered caravan and camping sites (as shown in Charts 3.1 – 3.3). Relevantly, results exclude unpowered sites and long term lodgings/occupancy.

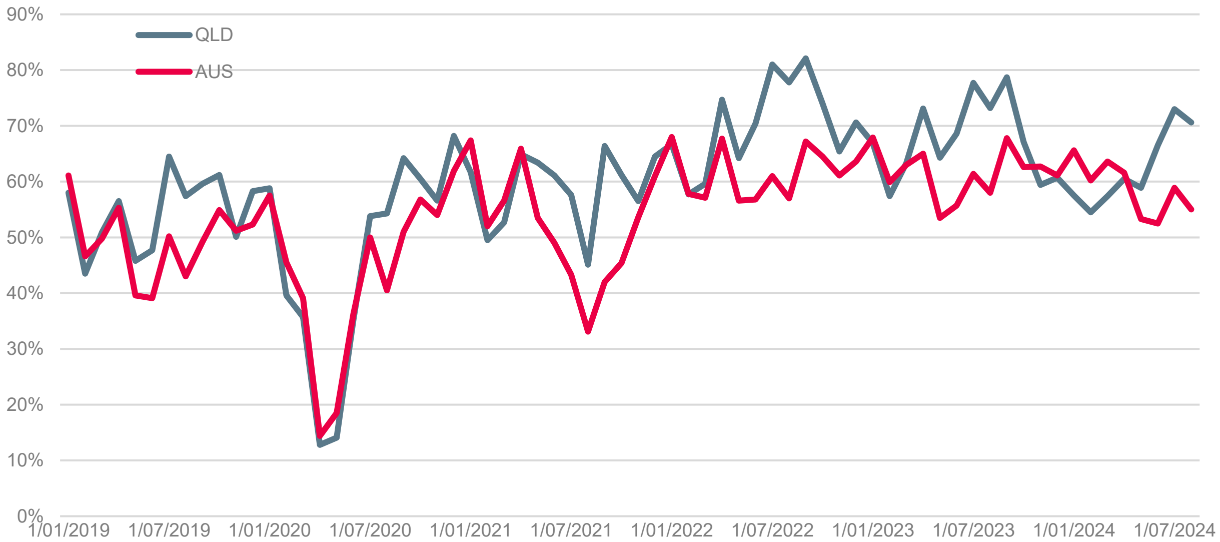
- According to the National Visitor Survey there were 283,712 caravan, camping and cabin sites in Queensland in February 2024. This includes 69,100 caravans and cabins (around 25% of the total) together with 214,612 tourist sites.

CHART 3.1. OCCUPANCY RATES FOR CARAVAN, CAMPING AND CABINS SITES, QUEENSLAND



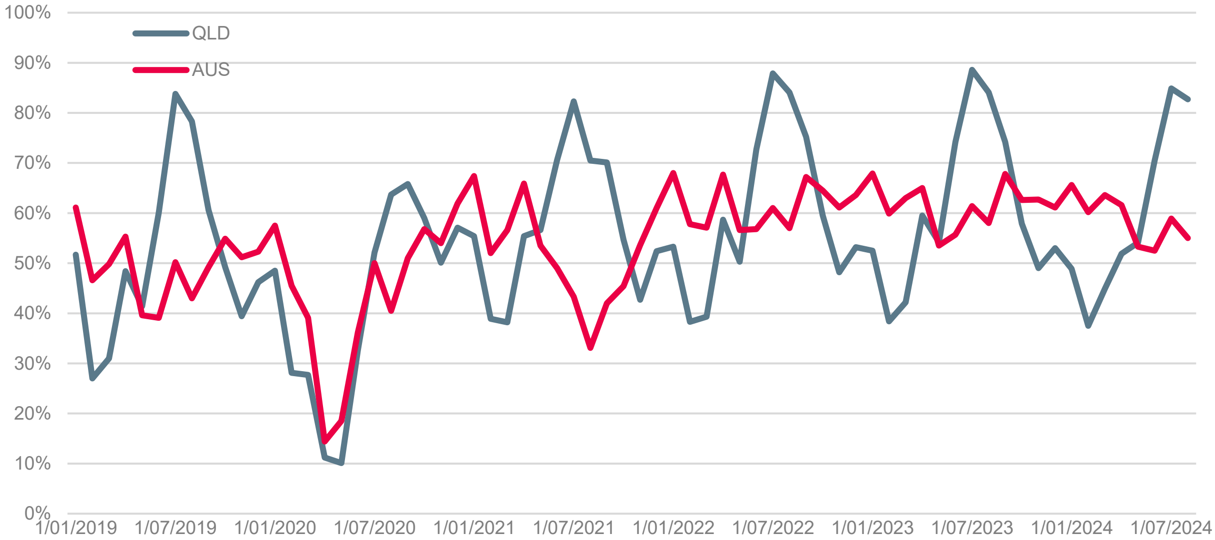
Source: Tourism Research Australia

CHART 3.2. OCCUPANCY RATES FOR ON-SITE CARAVANS AND CABINS, QUEENSLAND



Source: Tourism Research Australia

CHART 3.3. OCCUPANCY RATES FOR TOURIST SITES (CAMPING AND CARAVAN), QUEENSLAND



Source: Tourism Research Australia

iii. For a Queensland population of around 5.35 million people, this represents around 56 sites per 1,000 persons (13 sites per 1,000 persons for caravans and cabins). The Australian average is around 50 sites per 1,000 persons.

iv. Many caravan park or camping facilities have a significant surplus of unpowered sites (either for campers or caravan owners). This arises because facility operators typically provide a number of powered sites consistent with expectations of potential occupancy and allocate balance areas for unpowered sites (for peak periods). Unpowered site capacity (whether for camping or caravans) is rarely fully utilised.

v. Table 3.1 below reports the visitors nights by type of accommodation. Visitor nights are reported based on whether visitors stayed in commercial accommodation or non-commercial accommodation. Nights in a commercial caravan park or camping ground accounted for between 6.7% (in 2018/19) and 7.9% (in 2019/20) of all visitor nights in Queensland (average of 7.3% over the five year period), compared to between 8.3% (in 2018/19) and 9.7% (in 2022/23) nationally (average of 9.2% over five year period).

TABLE 3.1. VISITOR NIGHTS (,000) FOR COMMERCIAL AND NON-COMMERCIAL ACCOMMODATION, 2017/18-2022/23

	Year					
	2017/18	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**2022/23**
Queensland						
Commercial accommodation	42,566	45,535	36017	37656	41344	51584
--Caravan park or commercial camping ground	6,525	6,650	6472	5967	6432	7893
Non-commercial accommodation	40,643	45,691	38106	39291	40684	43991
--Caravan or camping-non commercial	5,097	5,534	3680	4826	5453	5490
Total accommodation	90,238	99,982	82101	82880	88670	101441
--Total caravan or camping	11,622	12,184	10152	10793	11886	13383
Australia						
Commercial accommodation	162,810	175,554	141414	141212	142276	194629
--Caravan park or commercial camping ground	32,334	33,305	30210	32076	31384	39291
Non-commercial accommodation	175,991	197,175	172012	170484	160681	185917
--Caravan or camping-non commercial	20,309	21,940	17060	20094	20156	22873
Total accommodation	362,533	400,217	341473	333652	327173	404663
--Total caravan or camping	52,643	55,246	47270	52171	51541	62164

Source: Tourism Research Australia

3.2. Caravan Industry Association of Australia

i. The Caravan Industry Association of Australia is the peak national body for the caravanning and camping industry in Australia. The organisation's vision is to lead and champion a safe, compliant and sustainable caravan and camping industry in Australia, while working under our operation pillars.

ii. A report prepared by the Caravan Industry Association of Australia entitled Caravan and Camping State of Industry 2022 outlines some of the following key findings:

- Domestic caravan and campers spent some 50.6 million nights camping across 12.6 million trips in 2022.
- Almost 24,000 recreational Vehicles (RVs, defined as caravans and campervans) were manufactured in Australia in 2021, while 772,600 RV vehicles were registered or 30.1 registrations per 1000 persons.
- In terms of caravan park performance, average annual occupancy reported was – 52% for cabins, 44% for powered sites and 12% for unpowered sites, recognising that there are peak periods which would result in higher occupancy rates and conversely low periods with lower than average occupancy rates.
- Approximately 89% of caravan and camping trips take place in regional Australia.
- The economic value of the industry is around $23.8 billion to the Australian economy annually.
- In 2021, a total of 22,700 towable recreation vehicles were produced in Australia representing a 44% increase from 2020. The growth in totals was largely due to higher outputs of caravans and camper trailers.
- By state, Queensland had the most registered RVs in 2021, exceeding 200,000 RV registrations for the first time. Queensland had more registrations than Victoria with 185,500 registrations.

- The average length of stay in caravan parks was four nights in 2021 compared to stays in all commercial accommodation which averaged 3.9 nights.

- Short trips (up to three nights) continue to account for more than half of caravan and camping trips, with trips of two-to-three nights long making up the largest share (43%). One in four caravan and camping trips are four-to-seven nights long.

- In terms of the top caravan and camping visitor regions in 2021, Sunshine Coast Tourism Region (TR) was ranked sixth at 525,000 overnight trips and 1.9 million visitor nights. Growth in trips was 31% in 2021.

- Cabins continued to be the most popular accommodation used in caravan parks based on the number of trips, re-gaining some market share in 2021. Nonetheless, nights spent in cabins remained at a market share of 26%. This means that cabins represent more a short stay option than a long-term accommodation option. In contrast, travelling with and staying in caravans (or other towable recreational vehicles) accounted for 28% of caravan and camping trips and for the largest share of nights (42%), making it the more popular accommodation option for longer trips.

iii. A further report entitled *Long Term Residents Caravan Parks and Manufactured Housing Estates* prepared for the Caravan Industry Association of Australia and dated 2018 overviews permanent residents who live in caravan parks. The report recognises that there are different versions of caravan parks with many including permanent cabins for longer term residents. This can be compared with a caravan park which is targeting short term visitors, which the subject development would be.

iv. Table 3.2 below reports the number of registered caravans and campervans in Queensland and Australia over the last five years. Growth in registrations for caravans and campervans has been above historic population growth. Growth in registrations of campervans was particularly strong, with the bulk of growth over the five-year period between 2020 and 2021, coming out of the COVID-19 pandemic.

TABLE 3.2. CARAVAN AND CAMPERVAN REGISTRATIONS FOR QUEENSLAND AND AUSTRALIA, 2018-2023

	Year						AAGR
	2018	**2019**	**2020**	**2021**	**2022**	**2023**	**2018-2023**
Queensland							
Caravan	163,000	171,000	175,000	183,000	194,000	206,000	4.8%
Campervan	16,672	17,409	17,835	23,105	24,528	25,735	9.1%
Total	**179,672**	**188,409**	**192,835**	**206,105**	**218,528**	**231,735**	**5.2%**
Australia							
Caravan	612,795	641,608	669,484	687,172	726,584	765,150	4.5%
Campervan	66,595	69,756	72,221	83,944	89,171	93,513	7.0%
Total	**679,390**	**711,364**	**741,705**	**771,116**	**815,755**	**858,663**	**4.8%**

Source: Tourism Research Australia

3.3. Summary

i. Caravanning and camping are growing in popularity as the Australian population grows. In line with increased popularity, ownership of caravans and recreational vehicles (RVs) is also increasing.

ii. Registrations of caravans and campervans has consistently increased over the last five years both nationally and in Queensland (4.8% per annum and 5.2% per annum respectively). The number of visitor nights spent in a caravan and camping grew by 3.4% and 2.9% respectively, exceeding population growth rates for the same period.

iii. The increase in caravan and campervan ownership is resulting in increased demand for caravan and holiday parks.

4 Sunshine Coast LGA Supply and Demand for Caravan and Camping Sites

4.1. Population Trends and Projections

i. The total population within the Sunshine Coast LGA was estimated at 346,752 persons in 2021. The population increased from 267,281 persons in 2011, representing an average annual growth rate of 7,947 persons. The rate of population growth throughout the Sunshine Coast LGA at that time averaged 2.6% annually, exceeding the South East Queensland and Australian averages over this period of 1.9% and 1.4%, respectively.

ii. Table 4.1 details population projections for the Sunshine Coast LGA based on official Queensland Government Statisticians Office (QGSO) medium series forecasts (June 2023 projections). The Sunshine Coast LGA population is projected to increase to 545,502 persons by 2046, representing an increase of some 171,150 persons over the period between 2021 and 2046, or 7,780 persons annually.

TABLE 4.1. SUNSHINE COAST LGA POPULATION GROWTH, 2011 - 2046

	Actual			Forecast						*Change*
Population	**2011**	**2016**	**2021**	**2024**	**2026**	**2031**	**2036**	**2041**	**2046**	***2024-46***
Sunshine Coast LGA	267,281	302,920	346,752	374,352	392,752	432,752	471,502	509,252	545,502	*171,150*
		Actual		**Forecast**						***Change***
Average Annual Change (No.)		**2011-16**	**2016-21**	**2021-24**	**2024-26**	**2026-31**	**2031-36**	**2036-41**	**2041-2046**	***2024-46***
Sunshine Coast LGA		7,128	8,766	9,200	9,200	8,000	7,750	7,550	7,250	*7,780*
		Actual		**Forecast**						***Change***
Average Annual Change (%)		**2011-16**	**2016-21**	**2021-24**	**2024-26**	**2026-31**	**2031-36**	**2036-41**	**2041-2046**	***2024-46***
Sunshine Coast LGA		2.5%	2.7%	2.6%	2.4%	2.0%	1.7%	1.6%	1.4%	*1.7%*
SE QLD		*2.0%*	*1.8%*	*1.6%*	*1.4%*	*1.3%*	*1.7%*	*1.6%*	*1.6%*	*1.5%*
Australian Average		*1.6%*	*1.2%*	*2.4%*	*1.6%*	*1.3%*	*1.2%*	*1.1%*	*1.1%*	*1.3%*

All figures as at June and based on 2021 SA1 boundary definition.
Sources : ABS; QGSO

4.2. Caravan and Camping Sites

i. Map 4.1 illustrates camping sites across Sunshine Coast LGA, with Tables 4.2 and 4.3 detailing information around these facilities. The key information can be summarised as follows:

- The largest caravan parks comprise over 200 total sites and include Cotton Tree Holiday Park (473), Coolum Beach Holiday Park (255), Mudjimba Beach Holiday Park (233) and Dicky Beach Family Holiday Park (199 excluding permanents). These facilities are all located along the coastline.

- Six of the major caravan parks are operated by Sunshine Coast Holiday Parks (Coolum Beach, Mudjimba Beach, Cotton Tree, Maroochydore Beach, Mooloolaba Beach and Dicky Beach). These facilities total 1,343 sites and represent over one-third of all sites concentrated in one group. Diversity of operators will add to choice and competition in this market.

- There are two very large camp grounds inland near Landsborough being Girl Guides Queensland, Boomajarril Campground (300 persons – 150 sites at 2 persons per site) and Rocky Creek Scout Campsite (515). These sites can be booked by the public but also target school groups. These two sites account for around 21% of the total indicated below. Campsites account for around one-third of the total (1,100).

- While permanency is advertised for some parks, there are a limited number of caravan parks which target permanent residents, noting there are a large and increasing number of manufactured home parks on the Sunshine Coast.

- Some facilities are not open all day, with Kookaburra Park campground only open on weekends and school holidays.

ii. There is estimated to be a total of some 3,138 cabins, powered and unpowered camping sites across caravans, camping, multi-use (both caravan and camping) and cabins. Where information was not provided by the operator, this has been estimated by Location iQ based on aerial imagery. The total excludes permanently occupied sites which are not available to tourists (of which there are a limited number).

iii. There is a distinct pattern of caravan parks (with camping facilities) located along the coastline, with campsites typically in the hinterland areas.

iv. In addition, there are a limited number of caravan park and camping ground proposals within the Sunshine Coast that are likely to be developed. These include:

- At 943 – 1005 David Low Way, Marcoola, The Shore (Stages 2 & 3) is a mixed use development that was approved by council, however, has since been deferred. The final stage of this project is planned to include 57 caravan sites.

- At the existing Ingenia Holidays Rivershore site, a two-stage proposal for an extension of the park has also been deferred. Stage 1 of the extension is planned to include 15 caravan sites, 15 cabins and 5 camp sites, whilst Stage 2 will include 42 caravan sites and 4 cabins.

- A development application was submitted for Discovery Glenview at 2574 Steve Irwin Way, Glenview. The development application covers the construction of a tourist park that will cater for 270 camp sites and 89 cabins, with the development still under review.

- At 82-188 Kenilworth-Brooloo Road, 50 camp sites are proposed as part of a development application that is awaiting approval.

v. Relevantly, as noted in the Section 2 of this report, there is indicated to be demand for a further 6 holiday parks (with 250 rooms each) over the period to 2029. There are clearly limited proposals currently.

vi. The Coochin Creek site is proposed to include some 150 sites and cabins. Inclusive of this proposal and all other proposed sites mentioned above, the number of sites and cabins would increase to 3,833 sites. The subject development would comprise some 3.9% of the total number of sites/cabins.

vii. There is limited information on the occupancy of caravan parks and camping sites specifically for the Sunshine Coast. The current source of information for occupancy rates and Average Daily Rate (ADRs) is the Australian Accommodation Monitor prepared by STR Limited on behalf of Tourism Research Australia. The scope of this accommodation monitor includes properties which have 10 or more rooms. Holiday parks are included in the sample but only as they relate to their fixed indoor cabin facilities, with campground facilities not included.

viii. The latest data is for the 2023 financial year but is also provided for each financial year dating back to 2016-17. Information is provided at regional, state, and national levels. Key tourism regions are included, the most relevant of which is the Sunshine Coast.

ix. For 2022-23 it was indicated there were around 9,500 rooms on the Sunshine Coast with an occupancy rate of 69.3% (Queensland average of 68.4%) and an ADR of $305.28 (highest in Queensland besides Whitsundays). In comparison, the average occupancy across the Sunshine Coast pre-COVID-19 was 66.7% with an ADR of $223.31. Clearly, the data indicates that occupancy throughout the Sunshine Coast, is rebounding and returned to above pre-COVID-19 levels, while at the same time ADRs have increased substantially.

x. Noosa Council also reported recently on the occupancy of Noosa Holiday Parks operated by Council. The information revealed Noosa Holiday Parks occupancy was up by 5.6% in the 2023-24 financial year, and forward bookings were already strong. The report also outlined that the parks earned a combined $4.53 million in revenue, which is an increase of 1.8%. Noosa Holiday Parks comprises the council-operated Noosa River Holiday Park, Noosa North Shore Campground and Boreen Point Campground.

xi. The above information is consistent with increasing demand for accommodation facilities, including caravan and camping parks.

MAP 4.1. SUNSHINE COAST LGA CAMPING AND CARAVAN PARKS

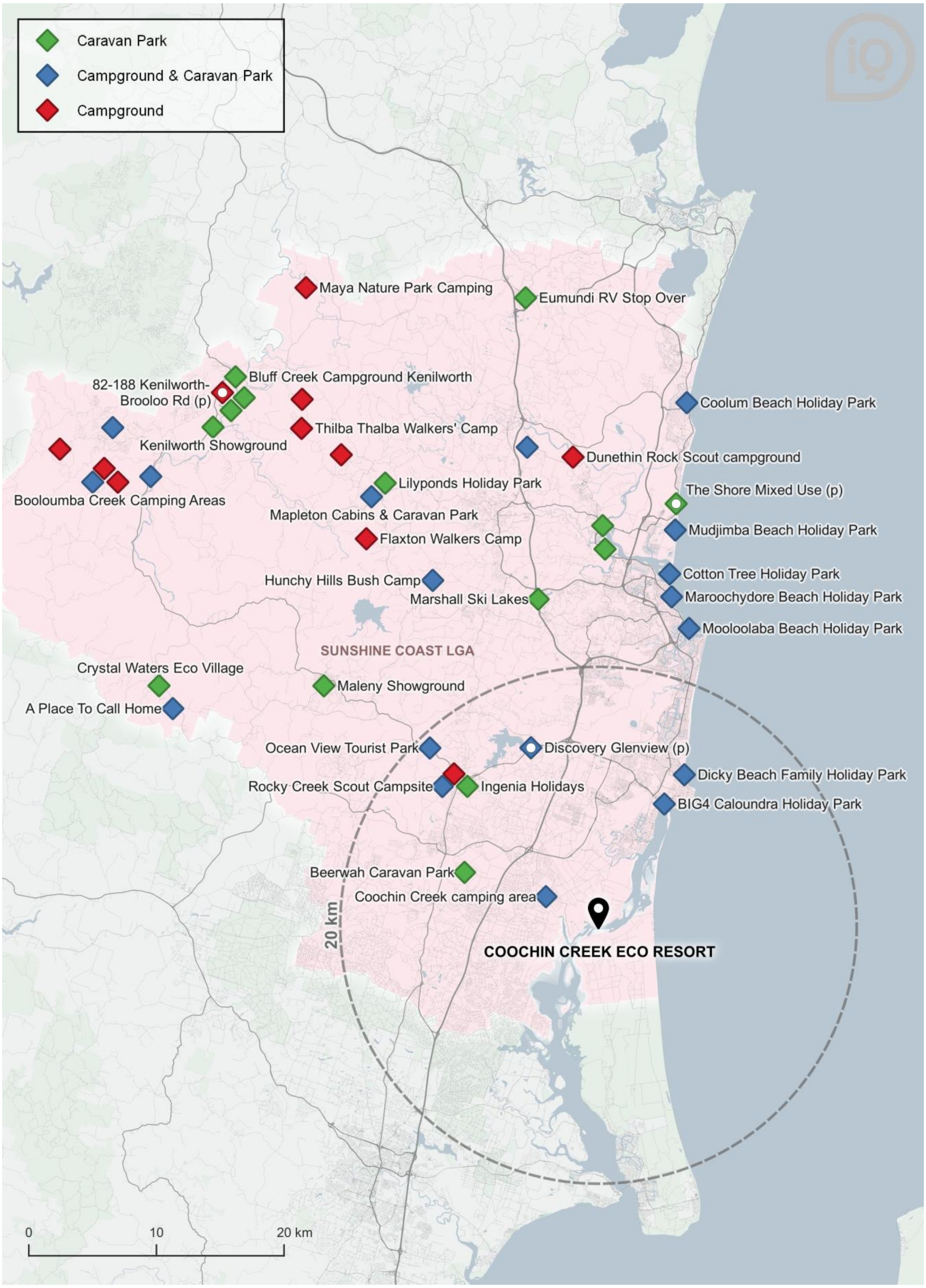


TABLE 4.2. CARAVAN AND CAMPING SITES, DETAILS

Name	Address	Caravan Sites	Camp Sites	Multi-use Sites	Cabins	Total Sites	Permanancy Advertised?
Existing							
A Place To Call Home	50 Kennedy Road, Conondale			10		**10**	
Beerwah Caravan Park	205 Burys Road, Beerwah	52				**52**	YES
BIG4 Caloundra Holiday Park	44 Maloja Avenue, Caloundra	96	7		7	**110**	
Bli Bli Riverside Caravan Park	297 David Low Way, Bli Bli	100				**100**	YES
Bluff Creek Campground Kenilworth	44 Wilcox Road, Kenilworth	10				**10**	
Booloumba Creek 4 Camping Area	LOT 274 Booloumba Creek Road, Cambroon			38 (75 persons)		**38**	
Booloumba Creek Camping Area 1	LOT 274 Booloumba Creek Road, Cambroon		24			**24**	
Booloumba Creek Camping Area 3	Cambroon		20			**20**	
Charlie Moreland Camping Area	Sunday Creek Road, Kenilworth			Open Area		**n.a.**	
Coochin Creek camping area	Roys Road, Coochin Creek			19		**19**	
Coolum Beach Holiday Park	1827 David Low Way, Coolum Beach	210		39	6	**255**	
Cotton Tree Holiday Park	2/36 Cotton Tree Parade, Maroochydore	335	129		9	**473**	
Crystal Waters Eco Village	Lot 1 Crystal Waters, 65 Kilcoy Lane, Conondale	5			1	**6**	
Dicky Beach Family Holiday Park	Beerburrum Street, Dicky Beach	128 (+87 permanent)	20	39	12	**199**	YES
Dunethin Rock Scout campground	8 Lake Dunethin Road, Maroochy River		95			**95**	
Eumundi RV Stop Over	Napier Rd &, Albert Street, Eumundi	20				**20**	
Flaxton Walkers Camp	Sunshine Coast Hinterland Great Walk, Flaxton		12			**12**	
Gheerulla Camping Area	Gheerulla		3			**3**	
Girl Guides, Boomajarril Campground	1 Coonowrin Street, Landsborough		150 (300 persons)			**150**	
Hidden Valley @ Gro Mad Plantations	180 Yandina Bli Bli Road, Maroochy River			3		**3**	
Hunchy Hills Bush Camp	347 Hunchy Road, Hunchy	3	1			**4**	
Ingenia Holidays Landsborough	1 Eudlo Street, Landsborough	32 (+64 permanent)			8	**40**	YES
Total Existing	***40 sites***	*1550*	*1045*	*477*	*66*	*3138*	

Source: Location iQ

TABLE 4.3. CARAVAN AND CAMPING SITES, DETAILS (CONTINUED)

Name	Address	Caravan Sites	Camp Sites	Multi-use Sites	Cabins	Total Sites	Permanancy Advertised?
Existing							
Ingenia Holidays Rivershore	99 David Low Way, Diddillibah	87 (+55 proposed)	(+5 proposed)		17 (+19 proposed)	**104**	
Kenilworth Camping	18 Paulger Road, Kenilworth	8				**8**	
Kenilworth Homestead	2760 Eumundi Kenilworth Road, Kenilworth	30				**30**	
Kenilworth Showground	Kenilworth	115				**115**	
Kookaburra Park	2951 Maleny Kenilworth Road, Cambroon	54	93			**147**	
Lilyponds Holiday Park	Lillyponds, 26 Warruga Street, Mapleton	2				**2**	
Maleny Showground	13 Maleny Stanley River Road, Maleny	15				**15**	
Mapleton Cabins & Caravan Park	85 Obi Obi Road, Mapleton	10	10			**20**	
Maroochydore Beach Holiday Park	1 Melrose Parade, Maroochydore	103	17		6	**126**	
Marshall Ski Lakes	1 Leafy Lane, Chevallum	20				**20**	
Maya Nature Park Camping	49 Belli Oak Tree Road, Belli Park		15			**15**	
Mooloolaba Beach Holiday Park	100 Parkyn Parade, Mooloolaba			57		**57**	
Mudjimba Beach Holiday Park	Cottonwood Street, Mudjimba			233		**233**	
Ocean View Tourist Park	2 Old Maleny Road, Landsborough		19	39		**58**	
Rocky Creek Scout Campsite	3246 Old Gympie Road, Beerwah	115	400			**515**	
Summer Falls Walkers' Camp	Kenilworth		6			**6**	
Thilba Thalba Walkers' Camp	Gheerulla		12			**12**	
Ubajee Walkers' Camp	Gheerulla		12			**12**	
Proposed							
The Shore Mixed Use (p)	943-1005 David Low Way, Marcoola	57				**57**	
Discovery Glenview (p)	2574 Steve Irwin Way, Glenview			270	89	**359**	
82-188 Kenilworth-Brooloo Road (p)	82-188 Kenilworth-Brooloo Road		50			**50**	
Total Existing	***40 sites***	*1550*	*1045*	*477*	*66*	*3138*	
Total Proposed	***3 sites + 1 expansion***	*112*	*55*	*270*	*108*	*545*	
Total Combined	***43 sites***	***1662***	***1100***	***747***	***174***	***3683***	

Source: Location iQ

4.3. Demand for Camping (Population)

i. As noted previously in Section 3, according to the National Visitor Survey there were 283,712 caravan, camping and cabin sites in Queensland in February 2024. This includes 69,100 caravan sites and cabins (around 25% of the total) together with 214,612 tourist sites. For a population of around 5.35 million people, this represents around 56 sites per 1,000 persons (13 sites per 1,000 persons for caravans and cabins). The Australian average is around 50 sites per 1,000 persons.

ii. Comparably, the Sunshine Coast LGA provided some 8.4 sites per 1,000 persons in 2024.

iii. Table 4.4 presents an analysis of demand for caravan and camping sites in the Sunshine Coast LGA, using the existing Sunshine Coast LGA average, as well as the Queensland average, separately for caravans and cabins (13 sites per 1,000 persons) and total sites (56 sites per 1,000 persons).

iv. By any measure there would be substantial demand for additional caravan and camping sites in Sunshine Coast LGA, as the population in the LGA increases rapidly. The most conservative measure, using the Sunshine Coast LGA current average of 8.4 sites per 1,000 persons indicates a shortfall in demand of 1,117 sites over the period to 2046.

v. Using a benchmark to population is an appropriate measure for demand for camping facilities reflecting:

- As the population increases in Sunshine Coast LGA, the critical mass of facilities that could be supported would increase reflecting sporting, cultural and other events that would be undertaken in the region as well as a wider range of infrastructure that would be supported in the area.
- One of the key drivers of demand for accommodation, includes visiting family and friends. The increased population will drive significant demand in this category.
- Caravan ownership has been increasing in recent years, including higher ownership rates in Queensland.

TABLE 4.4. SUNSHINE COAST LGA – DEMAND FOR CARAVAN AND CAMPING SITES

	Current	Forecast				
Factor	2024	2026	2031	2036	2041	2046
Sunshine Coast LGA Domestic Tourist Nights	374,352	392,752	432,752	471,502	509,252	545,502
Sunshine Coast LGA Caravan, Camping and Cabin sites (No.)						
• Number	3,138	3,683	3,683	3,683	3,683	3,683
• Number per 1,000 residents	8.4	9.4	8.5	7.8	7.2	6.8
Caravan, Camping and Cabin sites Demand (No.)						
• (@ 8.4 sites per 1,000 residents - Sunshine Coast Average in 2026)	3,294	3,456	3,808	4,149	4,481	4,800
• (@ 13 sites per 1,000 residents - Queensland Caravans and Cabins Average)	4,867	5,106	5,626	6,130	6,620	7,092
• (@ 56 sites per 1,000 residents - Queensland Average)	20,964	21,994	24,234	26,404	28,518	30,548
Shortfall in Caravan, Camping and Cabin sites Demand (No.)						
• (@ 8.8 sites per 1,000 residents - Sunshine Coast Average)	-156	227	-125	-466	-798	-1,117
• (@ 13 sites per 1,000 residents - Queensland Caravans and Cabins Average)	-1,729	-1,423	-1,943	-2,447	-2,937	-3,409
• (@ 56 sites per 1,000 residents - Queensland Average)	-17,826	-18,311	-20,551	-22,721	-24,835	-26,865

4.4. Demand for Camping (Tourism)

i. Another method of assessing demand for caravan park site is to assess the growth in the market and what share is typically directed to caravan parks and camping sites.

ii. Tourism id reports on tourism within the Sunshine Coast LGA. Data is sourced from Tourism Research Australia, National Visitor Survey and is not published.

iii. Table 4.5 and Chart 4.1 below report the historic tourism visitor numbers and visitor nights for the Sunshine Coast LGA between 2010/11 and 2022/23 (2023/24 figures are not yet available). Local government level international visitor results were not reported for 2019/20 to 2022/23. However, data reported below indicates domestic visitor nights are currently sitting above 2017/18 levels but marginally below 2018/19 levels, while domestic day trips for 2022/23 are significantly lower than the previous year and lower than any other year since 2010/11.

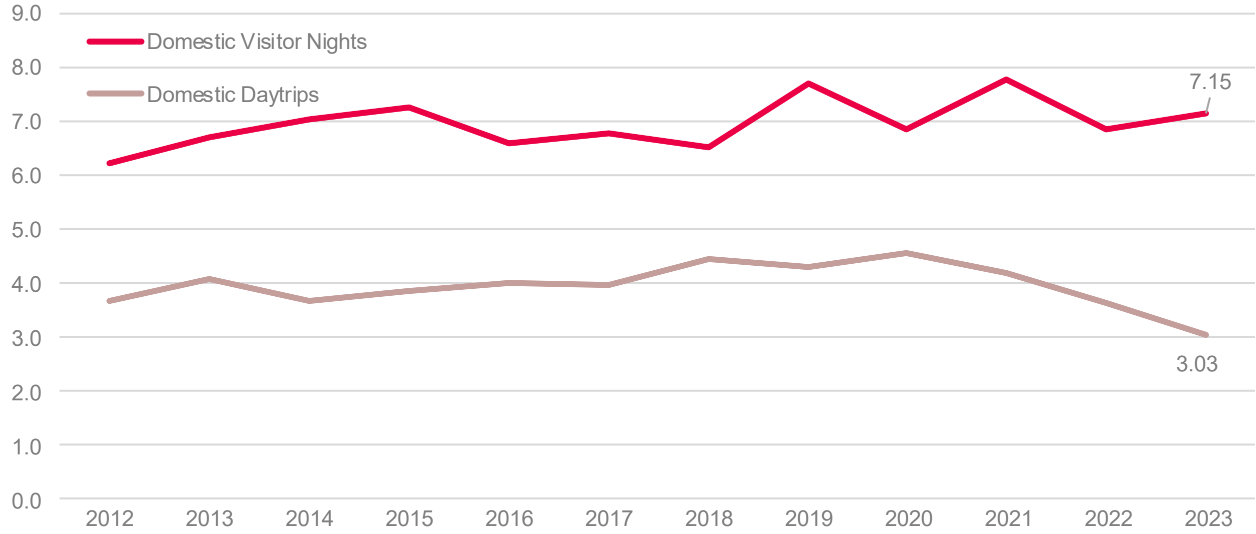
iv. The majority of nights spent in caravans or campers would likely come from domestic visitor nights rather than international visitor nights or domestic day trippers.

TABLE 4.5. SUNSHINE COAST LGA VISITOR NIGHTS, 2010/11-2022/23

	Sunshine Coast			Queensland		
Year	**Int Nights**	**Dom Nights**	**Dom Day**	**Int Nights**	**Dom Nights**	**Dom Day**
2010/11	1,408,071	6,805,372	3,048,509	39,056,633	69,289,686	34,686,803
2011/12	1,430,504	6,202,121	3,667,638	40,838,126	74,139,112	37,175,080
2012/13	1,434,561	6,695,940	4,066,118	45,079,308	74,292,520	38,428,300
2013/14	1,349,092	7,019,655	3,664,265	43,175,470	73,477,550	36,882,837
2014/15	1,130,727	7,246,070	3,838,999	46,867,682	76,645,949	37,854,586
2015/16	1,242,097	6,584,581	4,003,068	48,338,278	76,702,683	40,375,689
2016/17	1,324,294	6,781,405	3,955,974	50,614,171	80,200,191	38,225,857
2017/18	1,495,428	6,509,416	4,441,072	52,197,190	86,675,518	41,294,220
2018/19	1,663,458	7,711,653	4,312,153	53,205,830	96,473,279	46,772,437
2019/20	--	6,839,955	4,546,015	--	79,902,931	42,726,759
2020/21	--	7,768,528	4,179,759	--	80,937,503	40,610,794
2021/22	--	6,830,926	3,632,811	--	85,844,004	35,791,105
2022/23	--	7,149,009	3,032,402	--	94,273,457	42,076,506

Source: Tourism id

CHART 4.1. SUNSHINE COAST LGA DOMESTIC TOURISM



Source: Tourism Research Australia

v. Table 4.6 provides a summary of projected Sunshine Coast LGA domestic tourism over the period to 2046, including visitor numbers and nights. This information should be considered highly indicative, with key points to note as follows:

- Domestic Day Tripper figures are assumed to grow at an average annual rate of 2.7%, reflecting the pre-COVID-19 between 2013 and 2020.

- The impact from COVID-19 on domestic overnight visitors to the Sunshine Coast was minimal. Average annual growth is assumed to be 1.3%, reflecting the average between 2013 and 2023. In reality, this is a very conservative assumption given growth in the Sunshine Coast population is higher, while growth in adjoining LGAs to the south (key domestic overnight market) is also high (Moreton Bay and Brisbane LGAs). Between 2012-2019 growth in domestic overnight market was 3.2% annually. A figure of 2.5% has been used for this analysis.

- Some 7.3 million visitor nights are projected in 2024 for the domestic overnight market. This is projected to increase to 12.6 million by 2046. This is the market from which the majority of campers would come from.

- International visitor data is generally unavailable for the Sunshine Coast LGA during and post COVID-19. Estimates for this have been derived using pre-COVID-19 data and looking at the proportion of visitor nights attributable to the Sunshine Coast LGA from the wider Sunshine Coast Tourism Region. Average annual grown in international visitor nights pre-COVID-19 was 2.2%. This growth rate has been adopted over the period to 2046, resulting in some 4.3 million visitor nights.

vi. During 2019, some 10.6% of domestic overnight visitors nights and 1.4% of international visitors nights were spent in commercial camping and caravan park accommodation as sourced from Tourism Research Australia (2020). This is consistent with the Queensland average of 8% - 10% which has remained relatively stable between 2010 – 2023 (refer Chart 4.2).

vii. Applying these percentages to the number of domestic and international visitor nights provides demand for visitor nights in caravan and commercial camping. This information is detailed in Table 4.7 which outlines the calculation for the supply and demand for caravan and camping sites within the Sunshine Coast LGA.

viii. Overall, some 829,000 nights are demanded by both domestic and international tourists in caravan and camping sites. This increases to around 1.4 million nights by 2046, an increase of 2.5% annually. Relevantly, this analysis would exclude school groups, scout groups, etc who would use the camping sites of the Girl Guides and Scouts.

ix. In terms of caravan park performance, it was noted previously that the Caravan Industry Association of Australia report entitled Caravan and Camping State of Industry 2022 indicated average annual occupancy reported was 52% for cabins, 44% for powered sites and 12% for unpowered sites, recognising that there are peak periods which would result in higher occupancy rates and conversely low periods with lower than average occupancy rates. It is very difficult to report a blended average, but clearly unpowered sites represent a large proportion of the market (over one-third on the Sunshine Coast), which would bring the occupancy level down.

x. Supply of caravan and camping sites was previously discussed in Section 4.3. There is currently a total of 3,138 sites and with proposals this would increase to 3,683. Based on this total, average occupancy rates would currently be 32%-36%. Without further supply, however, occupancy rates would increase to 53% by 2046 – in line with powered and cabin sites (in a market which includes a substantial proportion of unpowered sites). If the Girl Guides and Scout camps are excluded, the occupancy rate would be 46% currently and increasing to 61% by 2046.

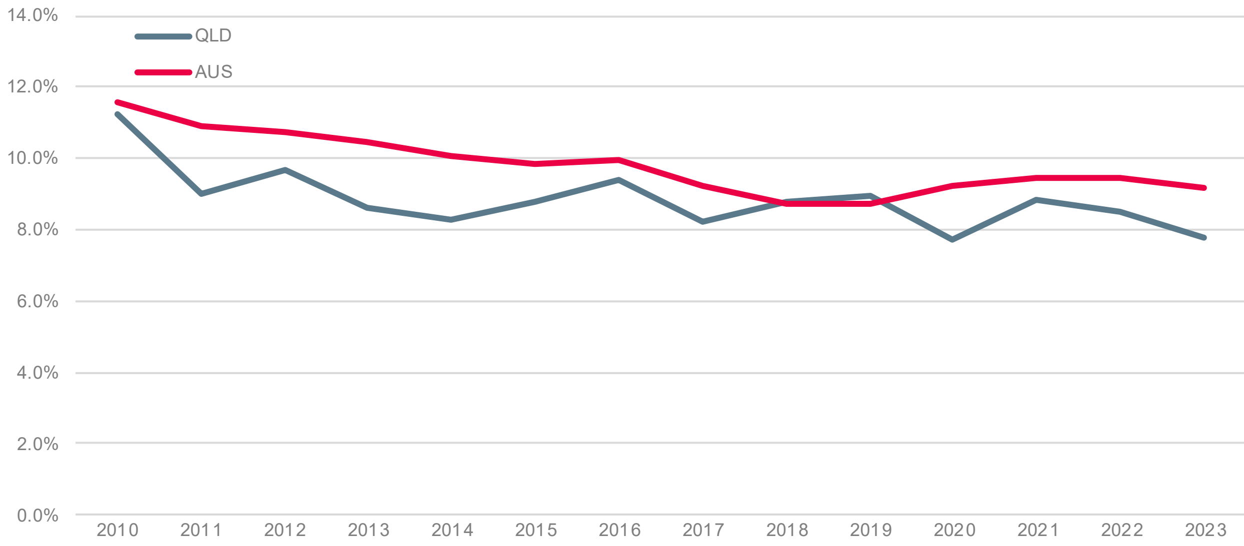
xi. Clearly, the occupancy rates of existing facilities will increase substantially over time with increased growth in visitors numbers. The analysis in this report represents a very conservative scenario of demand but shows increasing demand over time.

TABLE 4.6. SUNSHINE COAST LGA TOURISM PROJECTIONS, 2024 - 2041

Tourist Segment	Year						% Annual Growth				
	2024	2026	2031	2036	2041	2046	2024-26	2026-31	2031-36	2036-41	2041-46
Day Trippers											
Visitors (000's)	3,103	3,250	3,649	4,096	4,598	5,162	2.3%	2.3%	2.3%	2.3%	2.3%
Domestic Overnight Visitors											
Visitors (000's)	2,155	2,264	2,562	2,899	3,279	3,710	2.5%	2.5%	2.5%	2.5%	2.5%
Nights (000's)	7,328	7,699	8,710	9,855	11,150	12,615	2.5%	2.5%	2.5%	2.5%	2.5%
International Overnight Visitors											
Visitors (000's)	184	192	214	239	266	296	2.2%	2.2%	2.2%	2.2%	2.2%
Nights (000's)	2,655	2,772	3,087	3,439	3,830	4,266	2.2%	2.2%	2.2%	2.2%	2.2%

Source: Tourism Research Australia for Sunshine Coast LGA, Dec 2019, Tourism id

CHART 4.2. PROPORTION OF NIGHTS IN CARAVAN OR COMMERCIAL CAMPING, 2010-2023

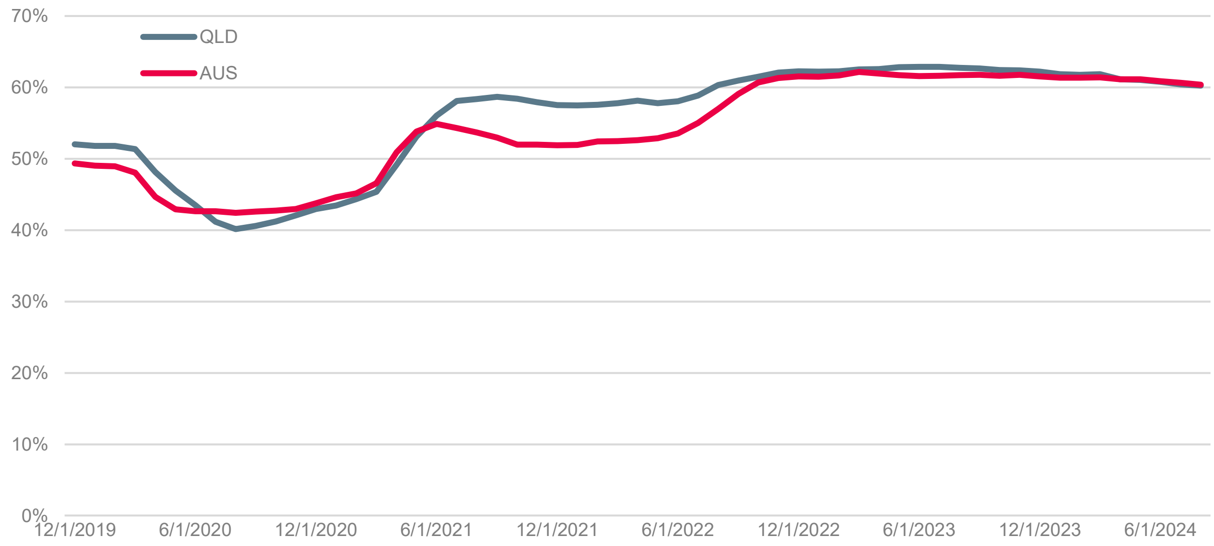


Source: Tourism Research Australia

TABLE 4.7. SUNSHINE COAST LGA – DEMAND FOR CARAVAN AND CAMPING SITES

Factor	Current 2024	Forecast 2026	2031	2036	2041	2046
Demand						
Sunshine Coast Domestic Visitor Nights ('000)	7,328	7,699	8,710	9,855	11,150	12,615
Dom Caravan and Commercial Camping Nights ('000)	791	831	941	1,064	1,204	1,362
Sunshine Coast International Visitor Nights ('000)	2,655	2,772	3,087	3,439	3,830	4,266
Int Caravan and Commercial Camping Nights ('000)	37	39	43	48	54	60
Total Demand ('000)	829	870	984	1,112	1,258	1,422
• Number of sites (assuming 2 persons per site)	414	435	492	556	629	711
Supply						
Sunshine Coast LGA Caravan, Camping and Cabin sites (No.)	3,138	3,683	3,683	3,683	3,683	3,683
• Total Annual Supply Nights (i.e. x 365) ('000)	1,145	1,344	1,344	1,344	1,344	1,344
Calculated Occpuancy rate	36%	32%	37%	41%	47%	53%

CHART 4.3. OCCUPANCY RATES FOR CARAVAN, CAMPING AND CABINS SITES (ROLLING 12 MONTH AVERAGE)



Source: Tourism Research Australia

5 Needs Assessment

This section of the report presents an analysis of need for the subject facility.

5.1. Key Conclusions

i. The analysis in this report indicated there is a community and economic need for the proposed camping ground to be developed at the subject site reflecting:

- The Sunshine Coast LGA is projected to grow significantly over the next 25 years. This will create demand from tourists visiting family and friends.
- The Sunshine Coast LGA is a major tourist market which is indicated to continue to grow rapidly in terms of visitor numbers.
- In addition, the Sunshine Coast Council is targeting significant growth in the tourism industry as evidenced by a number of strategic planning documents.
- Caravan and camping is a growing industry in Australia.
- There is a very limited number of proposals for holiday parks in spite of indicated strong demand for such facilities, particularly in terms of providing diversity and choice (noting six key holiday parks on the Sunshine Coast are operated by the one group).
- The provision of camping facilities in Sunshine Coast LGA is well below comparable Australian averages.
- Upon investigation, many of the existing camping grounds/caravan parks are well patronised in peak periods. Evidence of occupancy rates for accommodation facilities indicates increasing occupancy and growing Average Daily Rates (ADRs). These are indicators of need.
- The subject site will be able to cater to a wide range of caravan types including recreational vehicles and 5-wheelers.
- In a rapidly growing area there is need for a range of accommodation facilities including caravan parks/campgrounds.
- The proposal would add to diversity and choice of facilities.
- The proposed site is well located to a range of tourist/recreation facilities including adjoining recreation facilities associated in close proximity to Moreton Bay Marine Park and Bribie Island National Park. A boat ramp at the nearby Coochin Creek attracts a high level of visitor activity.
- The subject site is well located to existing and proposed infrastructure, recognised by the existing approval.

- The development of the Coochin Creek Eco Park would result in a positive economic benefit to the local community, providing a facility which is appropriate in its size and location.
- The proposal will not impact on the continued operation of other camping grounds or caravan parks.
- From an economic point of view, the subject development is of a type and scale appropriate for the prevailing nature of the area and the circumstances of the site and its surrounds given it is limited in size, will not allow permanent residents and is close to nearby infrastructure.

5.2. Supply and Demand Considerations

i. The proposed development comprises 75 camp site and 75 cabins (38 three-bed, 27 two-bed and 10 one-bed cabins). A range of leisure activities are centrally located between the cabins and camp sites, including a pool, waterplay park, indoor recreation, putt putt, jumping pillow, basketball, tennis and pickleball.

i. An analysis of supply and demand has been undertaken to assess the need for additional camping facilities across the Sunshine Coast. This analysis is undertaken under two alternative pretexts for the driver of demand for camping and caravan sites. The first is based on the resident population within the Sunshine Coast LGA and the second utilises domestic and international tourist visitor nights.

ii. The demand assessment has highlighted that there is growing demand for caravan and camp site accommodation on the Sunshine Coast. There is significant variance in camp site occupancy rates.

iii. There is estimated to be a total of some 3,138 sites across caravans, camping, multi-use (both caravan and camping) and cabins. Where information was not provided by the operator, this has been estimated by Location iQ. This excludes permanently occupied sites which are not available to tourists where this information is available.

iv. The current provision of sites across the Sunshine Coast LGA is 8.9 sites per 1,000 persons in 2024. The Queensland average for caravans and cabins is 13 sites per 1,000 persons whilst it is 56 sites per 1,000 persons for total sites (including camping sites).

v. The most conservative measure, using the Sunshine Coast LGA current average of 8.8 sites per 1,000 persons indicates a shortfall in demand of over 967 sites over the period to 2046.

vi. Considering demand from a tourism perspective, some 819,000 person nights are demanded by both domestic and international tourists in caravan and camping sites. This increases to around 1.1 million sites by 2046.

vii. A current occupancy rate of around 36% would increase to over 50% by 2046.

viii. The introduction of the proposed facility is not expected to result in the closure of competing facilities in the area. The average occupancy rates are projected to remain fairly stable, as the new development will only account for 3.9% of the total available short-term accommodation in the region, including future supply. Therefore, its impact on the overall market is anticipated to be minimal.

ix. The above analysis indicates significant economic and community need exists for the proposed development of 150 sites at Coochin Creek.

x. Overall, in an environment of increasing occupancy rates for existing campgrounds and caravan parks, and with substantial ongoing population and visitor growth in the Sunshine Coast, there is ongoing need for further camping and caravan facilities.

5.3. Employment

i. The proposed development comprises 75 camp site and 75 cabins (38 three-bed, 27 two-bed and 10 one-bed cabins). A range of leisure activities are centrally located between the cabins and camp sites, including a pool, waterplay park, indoor recreation, putt putt, jumping pillow, basketball, tennis and pickleball.

Ongoing Employment Generation

i. A number of employment opportunities would be generated from the construction of such facilities as well as from ongoing operation when completed.

ii. Table 5.1 summarises the projected level of ongoing employment likely to be generated by the Coochin Creek development. The employment benchmarks used to calculate the indicative total jobs generated is based on information from the Caravan Industry Association of Australia who note that the industry have 50,000 direct employees across 6,000 businesses, resulting in an average of 8.3 employees per business.

iii. Considering the wide range of onsite leisure activities available, which require maintenance and supervision, there will likely be a higher provision of employees when the Coochin Creek site is operational.

iv. The proposed development is assumed to employ 17 persons i.e. double the benchmark. Taking a conservative view and allowing for an estimated 10% of the total increase to result due to reduced employment at existing facilities, net additional jobs are estimated at 15.

TABLE 5.1. NET ADDITIONAL ESTIMATED PERMANENT EMPLOYMENT

		Employment Potential		
Component	**Benchmark** (per site)	Uplift Factor	Indic. Total Jobs	Net Increase[1]
Caravanning and Camping	8.33	2.0	17	15

1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development
Source : Caravan and Camping in Australia

Construction

i. Construction at Coochin Creek is indicated to incur total capital costs of $35 million, generating significant employment within the construction and associated industries during the development of the project.

ii. By using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and a deflated estimated total capital cost of construction of $15.02 million (i.e., in 1996/97 dollars), it is estimated that the construction period of the proposed development would directly create some 105 full-time, part time and temporary jobs over the development timeline (refer Table 5.2).

TABLE 5.2. ESTIMATED CONSTRUCTION EMPLOYMENT

Metric	Total
Estimated Capital Costs of Construction	
Estimated Capital Costs 2023/24 ($M)*	$35.0
Estimated Capital Costs 1996/97 ($M)	$15.02
Direct Employment Generation	
Construction Jobs per $1 million (2023/24)	3.00
Total Construction Jobs[1]	**105**

Source : Australian National Accounts: Input-Output Tables 1996-97
Employment totals include both full-time and part-time work. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year

Multiplier Effect

iii. Overall, it is estimated that the proposed development will directly generate the following jobs (refer Table 5.3):

- Ongoing Employment from planned floorspace: 15 jobs
- Construction Phase: 105 jobs

- In addition to the direct employment generated, multiplier effects will flow through the local economy and indirectly generate additional employment opportunities through ancillary businesses/suppliers that support the development and services, as well as additional consumption expenditure by workers employed within the precinct (spending wages).
- Again, by using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and adjusting for inflationary and other changes to present, it is estimated that an additional 183 jobs will be created indirectly.

iv. Overall, the proposed redevelopment is likely to generate 303 jobs directly and indirectly.

TABLE 5.3. ESTIMATED CONSTRUCTION EMPLOYMENT

Metric / Category	Est. Net Employment Increase[1]	Employment Multiplier Effects	Total Employment
Ongoing Employment from Planned Floorspace			
Caravanning and Camping	15	14	29
Construction Phase			
Direct Employment Generation	105	168	274
Net Additional Employment		**183**	**303**

1. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase

5.4. Adverse Impacts

i. It has been noted that tourism is a vital part of the Sunshine Coast economy. Economy id provide estimates of the value of the tourism industry to the Sunshine Coast, indicating the total tourism sales on the Sunshine Coast was $2,694.0 million in 2022/23, with the total value added was $1,489.2 million. Importantly, tourism accounted for around 9.3% of employment.

ii. The previous sections have indicated the positive benefits of the proposal. There are also a number of significant adverse economic impacts if the subject proposal does not proceed including:

iii. Loss of employment in a key industry.

- Loss of opportunity for diversity and choice of accommodation facilities, with only one proposal for new holiday parks along the coastline, and with existing holiday parks on the Sunshine Coast concentrated in the ownership of one group. Additionally, there are limited holiday parks in the Sunshine Coast LGA that currently include the range of onsite leisure facilities proposed at the Coochin Creek site.

- Loss of opportunity to reinforce the Sunshine Coast as a key tourist destination, renowned for its stunning beaches, scenic coastal walks, and proximity to nearby attractions like Mount Coolum, the Sunshine Coast Hinterland, and various national parks.

- Lack of alternate sites to incorporate the development on the Sunshine Coast, particularly in coastal areas

References

Map 1.2 – Aerial imagery by *MetroMap.com*

Figure 1.1. – Plan provided by *Comiskey Group*

Tabel 2.1 – Sunshine Coast Regional Snapshot March 2024 by *Tourism and Events Queensland*

Table 2.2 – Sunshine Coast LGA December 2019 by *Tourism Research Australia*

Tabel 2.3 – Sunshine Coast Regional Snapshot March 2024 by *Tourism and Events Queensland*

Chart 2.1 – Airport Traffic Statistics January 2009 to April 2024 by the *Bureau of Infrastructure and Transport research Economics*

Chart 2.2 – Airport Traffic Statistics January 2009 to April 2024 by the *Bureau of Infrastructure and Transport research Economics*

Section 2.3 – Sunshine Coast Destination Tourism Plan, 2020-2025

Section 2.3 – Sunshine Coast Major Events Strategy 2018-2028 (2023 Refresh)

Section 3.1 – Data from the National Visitor Survey by *Tourism Research Australia*

Chart 3.1 – Data from the National Visitor Survey by *Tourism Research Australia*

Chart 3.2 – Data from the National Visitor Survey by *Tourism Research Australia*

Chart 3.3 – Data from the National Visitor Survey by *Tourism Research Australia*

Table 3.1 – Data from the National Visitor Survey by *Tourism Research Australia*

Section 3.2 - Caravan and Camping State of Industry 2022 by the *Caravan Industry of Australia*

Section 3.2 - Long Term Residents Caravan Parks and Manufactured Housing Estates by the *Caravan Industry of Australia*

Table 3.2 – Caravan and Camping data by *Tourism Research Australia*

Table 4.1 – *Australian Bureau of Statistics, Queensland Government Statisticians Office*

Section 4.2 – Research undertaken by *Location iQ, Cordell Connect*

Section 4.4 – Sunshine Coast LGA sourced from *Tourism Research Australia* by *Tourism id*

Table 4.5 – Sunshine Coast LGA sourced from *Tourism Research Australia* by *Tourism id*

Chart 4.1 – Sunshine Coast LGA sourced from *Tourism Research Australia* by *Tourism id*

Table 4.6 – Sunshine Coast LGA sourced from *Tourism Research Australia* by *Tourism id*

Chart 4.2 – Sunshine Coast LGA sourced from *Tourism Research Australia* by *Tourism id*

Chart 4.3 – Sunshine Coast LGA sourced from *Tourism Research Australia* by *Tourism id*

Table 5.1 – Based on data by *Caravan Industry Association of Australia*

Table 5.2 – Australian National Accounts: Input-Output Tables 1996-97 by the *Australian Bureau of Statistics*

Table 5.3 – Australian National Accounts: Input-Output Tables 1996-97 by the *Australian Bureau of Statistics*

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