

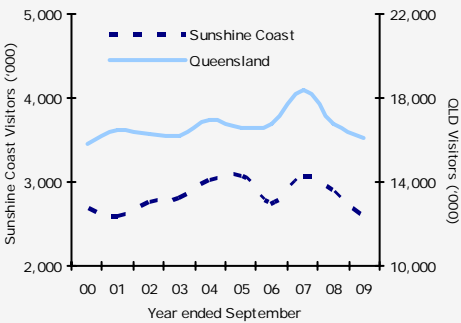
Sunshine Coast Regional Snapshot

Year ended September 2009



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic overnight	2,573,000	1,640,000	741,000	138,000	\$1,668
Annual change ¹	▼ -10%	▼ -7%	▼ -13%	▼ -36%	▼ -11%
Trend change ²	▼ -2%	0%	▼ -6%	▼ -4%	▲ 5%
International overnight	283,000	225,000	51,000	6,000	\$230
Annual change	▲ 4%	▲ 2%	▲ 16%	▼ -14%	▲ 34%
Trend change	▲ 4%	▲ 4%	▲ 3%	0%	▲ 7%

Domestic visitation



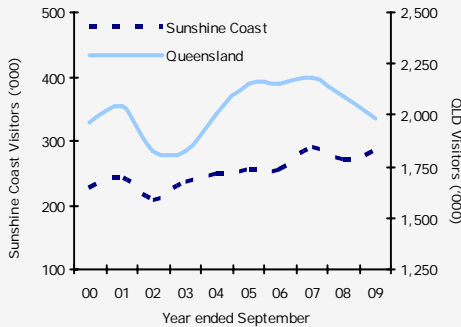
■ In line with the national and state trend, domestic visitors to the Sunshine Coast declined. The decline in domestic visitors was driven by the holiday and VFR (visiting friends or relatives) markets.

■ Positively the number of intrastate holiday visitors increased, with Brisbane holidaymakers continuing to increase their travel to the region.

■ Intrastate VFR visitors in contrast declined. This pattern of a reduction in domestic VFR travel in times of economic uncertainty is one which has been seen previously. Recent improvements in consumer confidence will likely provide a boost to this market.

■ The decline in the interstate holiday visitors was driven by the Sydney holiday market. Overall domestic travel by Sydney residents was down 8% in the year ending September 2009. The global financial crisis has had a significant effect on Sydney residents, and hence they have reduced their domestic trips over the last year.

International visitation



■ The international market to the Sunshine Coast increased over the last year, with holiday and VFR visitors growing.

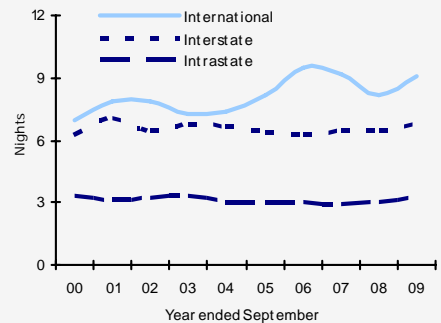
■ The United Kingdom (UK), New Zealand and German markets all recorded increases.

■ The New Zealand market (the regions top international source market) recovered from a decline in the previous year, to record an increase of 4%.

■ International visitor expenditure to the region showed a marked increase over the year with a 34% increase to \$230 million.

■ Contributing to the increase in expenditure would have been an increase in education visitors whose stay in the region is typically quite lengthy. International holiday and VFR visitors also increased their length of stay in the region, with this further assisting expenditure growth.

Average length of stay (Sunshine Coast)



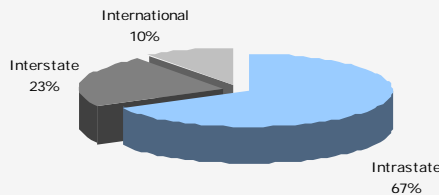
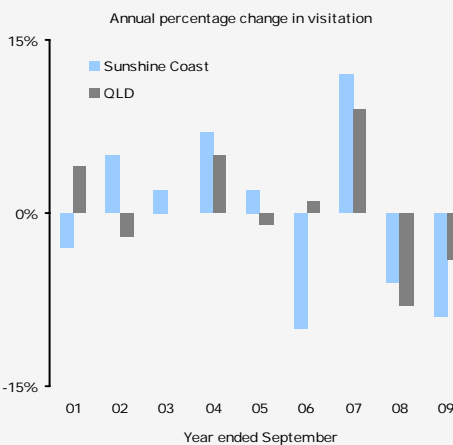
■ The domestic market's average length of stay on the Sunshine Coast showed a small increase of 0.2 nights, going against the trend seen in other destinations of shorter breaks.

■ Intrastate visitors length of stay remained largely stable.

■ The interstate market's length of stay also remained steady. The only notable change was from the interstate business market whose average length of stay to the region declined by 0.7 nights.

■ The length of stay by international visitors increased overall with the increase in nights from the New Zealand and UK markets influencing the growth. International average length of stay increased by 0.9 nights over the year.

Total visitation



■ In the year ending September 2009 there were a total of **2,856,000** overnight visitors to the Sunshine Coast. This represents an 9% decline compared with the year ending September 2008.

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.

Domestic visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,640,000	-7%	7,577,000	-8%	4.6	-0.1
VFR	741,000	-13%	2,453,000	-4%	3.3	0.3
Business	138,000	-36%	307,000	-44%	2.2	-0.3
Total	2,573,000	-10%	10,777,000	-6%	4.2	0.2
Intrastate						
Holiday	1,236,000	3%	4,633,000	10%	3.7	0.2
VFR	536,000	-18%	1,254,000	-16%	2.3	0.0
Business	103,000	-31%	219,000	-36%	2.1	-0.2
Total	1,906,000	-7%	6,255,000	1%	3.3	0.3
Interstate						
Holiday	404,000	-27%	2,944,000	-26%	7.3	0.1
VFR	205,000	6%	1,198,000	12%	5.8	0.3
Business	36,000	n/p	87,000	n/p	2.4	-0.7
Total	667,000	-18%	4,522,000	-15%	6.8	0.3

Key domestic source markets to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change
Brisbane	1,204,000	-7%	3,765,000	-3%
Regional Qld	702,000	-8%	2,490,000	7%
Sydney	197,000	-32%	1,012,000	-35%
Regional NSW	155,000	-7%	700,000	-24%
Melbourne	155,000	-14%	1,134,000	-9%
Regional Vic	65,000	-10%	1,083,000	50%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,098,000	-4%	69,937,000	-4%
NSW	22,221,000	-9%	76,541,000	-7%
Victoria	15,911,000	-7%	49,415,000	-6%
Rest of Aus	14,468,000	-8%	60,780,000	-12%
Australia	66,446,000	-7%	256,673,000	-7%

Holiday visitors

Queensland	7,385,000	-3%	35,946,000	-5%
NSW	10,076,000	-4%	39,354,000	-1%
Victoria	7,484,000	-8%	24,976,000	-6%
Rest of Aus	6,270,000	-8%	28,602,000	-13%
Australia	30,096,000	-6%	128,878,000	-6%

Queensland recorded a more marginal decline in total visitors, and holiday visitors than the nation. Queensland's improved holiday and VFR results were a key contributor.

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Sunshine Coast	5,031,000	5%	\$400	-9%
Queensland	31,239,000	10%	\$3,136	0%
Australia	142,714,000	5%	\$14,450	1%



Sunshine Coast Regional Snapshot

International visitation Year ended September 2009

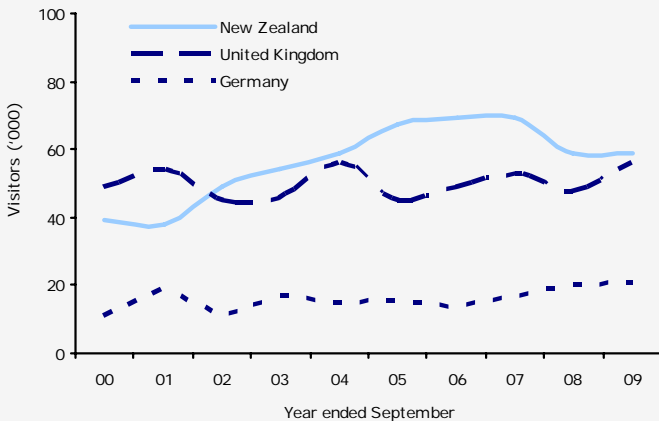
International visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	225,000	2%	1,478,000	4%	6.6	0.2
VFR	51,000	16%	521,000	15%	10.3	-0.1
Business	6,000	-14%	37,000	-31%	6.4	-1.4
Total	283,000	4%	2,587,000	16%	9.1	0.9

Key international source markets and purpose of visit

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	83,000	4%	717,000	20%
United Kingdom	68,000	24%	536,000	48%
Germany	24,000	9%	250,000	53%
United States	13,000	-19%	98,000	-17%
Canada	12,000	0%	119,000	6%

New Zealand, United Kingdom and German visitors to the Sunshine Coast YE September 00 - 09



Holiday visitors

New Zealand	59,000	0%	526,000	18%
United Kingdom	56,000	17%	308,000	24%
Germany	21,000	5%	83,000	-17%
Canada	11,000	10%	89,000	65%
United States	9,000	-10%	37,000	-23%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,982,000	-6%	40,032,000	1%
NSW	2,659,000	-6%	59,502,000	4%
Victoria	1,502,000	1%	37,693,000	14%
Rest of Aus	1,343,000	0%	37,534,000	10%
Australia	5,051,000	-2%	174,761,000	7%

Holiday visitors

Queensland	1,432,000	-7%	19,795,000	6%
NSW	1,519,000	-5%	19,523,000	10%
Victoria	752,000	-3%	7,967,000	3%
Rest of Aus	751,000	-3%	11,974,000	5%
Australia	2,773,000	-5%	59,259,000	7%

Queensland saw an increase in the often more affordable form of travel, VFR. However, due to its' greater reliance on the holiday market, a 3% decline in the market saw the state see a larger drop in visitation overall than the nation.



Regional Snapshots for all Queensland regions are available on the TQ Research website, www.tq.com.au/research

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

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

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Sunshine Coast Regional Snapshot

Year ended September 2009

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,668,000	5%	14,574,000	4%	3.1	-0.1	28%	38%	26%	29%
Gold Coast	3,204,000	-3%	13,725,000	-6%	4.3	-0.1	62%	26%	10%	20%
Sunshine Coast	2,573,000	-10%	10,777,000	-6%	4.2	0.2	64%	29%	5%	16%
SEQC ³	2,360,000	-2%	6,531,000	-5%	2.8	0.0	39%	44%	12%	15%
Tropical North Qld	1,578,000	6%	7,755,000	0%	4.9	-0.3	54%	26%	16%	10%
Central Queensland	1,087,000	5%	3,991,000	19%	3.7	0.5	41%	26%	25%	7%
Toowoomba	984,000	-18%	2,909,000	-8%	3.0	0.4	32%	37%	25%	6%
Fraser Coast	858,000	14%	3,420,000	14%	4.0	0.0	49%	36%	12%	5%
Townsville	807,000	-9%	3,425,000	17%	4.2	0.9	39%	25%	29%	5%
Capricorn	576,000	-27%	2,295,000	-6%	4.0	0.9	38%	29%	24%	4%
Mackay	556,000	-9%	2,102,000	-31%	3.8	-1.2	29%	32%	31%	3%
Bundaberg	511,000	-17%	1,904,000	-5%	3.7	0.4	35%	46%	13%	3%
Whitsundays	416,000	-16%	1,852,000	-15%	4.5	0.1	69%	18%	7%	3%
Outback	378,000	-17%	1,946,000	-14%	5.2	0.2	41%	12%	38%	2%
Gladstone	321,000	16%	1,331,000	48%	4.1	0.9	56%	22%	16%	2%
Western Downs	294,000	n/p	943,000	n/p	3.2	0.7	36%	25%	34%	2%
Southern Downs	194,000	n/p	470,000	n/p	2.4	-0.2	57%	30%	8%	1%
Total	16,098,000	-4%	69,937,000	-4%	4.3	-0.1	46%	32%	19%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	913,000	1%	16,137,000	2%	17.7	0.2	56%	28%	11%	46%
Gold Coast	794,000	-3%	7,860,000	-2%	9.9	0.1	79%	16%	4%	40%
Tropical North Qld	667,000	-17%	6,504,000	-1%	9.8	1.7	91%	5%	3%	34%
Sunshine Coast	283,000	4%	2,587,000	16%	9.1	0.9	80%	18%	2%	14%
Whitsundays	223,000	0%	1,288,000	0%	5.8	0.0	97%	2%	0%	11%
Fraser Coast	189,000	-7%	765,000	-11%	4.1	-0.1	96%	4%	0%	10%
Townsville	147,000	-1%	1,335,000	6%	9.1	0.6	80%	14%	3%	7%
Central Queensland	129,000	7%	1,140,000	8%	8.9	0.2	86%	9%	4%	7%
SEQC ³	119,000	9%	2,278,000	27%	19.2	2.7	40%	50%	5%	6%
Capricorn	78,000	3%	575,000	-4%	7.4	-0.5	86%	8%	4%	4%
Gladstone	61,000	3%	390,000	-14%	6.4	-1.2	87%	7%	3%	3%
Mackay	54,000	2%	453,000	79%	8.4	3.6	78%	17%	7%	3%
Bundaberg	51,000	38%	624,000	18%	12.3	-1.9	76%	18%	2%	3%
Toowoomba	37,000	6%	674,000	18%	18.0	1.5	51%	32%	11%	2%
Outback	27,000	-21%	340,000	-9%	12.8	2.0	89%	4%	4%	1%
Western Downs	15,000	n/p	198,000	n/p	13.2	3.7	73%	13%	7%	1%
Southern Downs	7,000	n/p	185,000	n/p	26.8	10.2	71%	14%	0%	0%
Total	1,982,000	-6%	40,032,000	1%	20.2	1.4	72%	25%	8%	-

Data sources: National & International Visitor Surveys, Tourism Research Australia. Visitor expenditure data is courtesy of Tourism Research Australia.

1. Percentage change from the year ended September 2008 to the year ended September 2009

2. Trend change refers to the percentage change between the 3 years to September 2008 vs. the 3 years to September 2009

3. South East Queensland Country

n/p – this information is not published due to low sample size