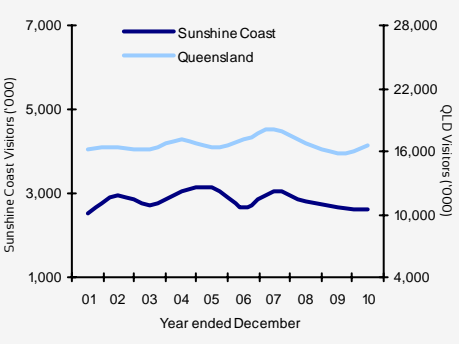


Year ended December 2010



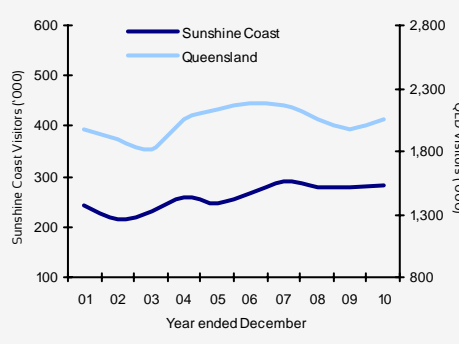
	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic overnight	2,604,000	1,541,000	818,000	161,000	\$1,590
Annual change ¹	▼ -3%	▼ -10%	▲ 9%	▲ 5%	▼ -12%
Trend change ²	▼ -5%	▼ -4%	▼ -7%	▼ -4%	▼ -2%
International overnight	283,000	225,000	52,000	6,000	\$240
Annual change	▲ 2%	▲ 3%	▲ 2%	▲ 20%	▲ 8%
Trend change	▼ -1%	0%	▼ -1%	▼ -18%	▲ 5%
TOTAL	2,887,000	1,766,000	870,000	167,000	\$1,830
Annual change	▼ -2%	▼ -9%	▲ 8%	▲ 6%	▼ -10%

Domestic visitation



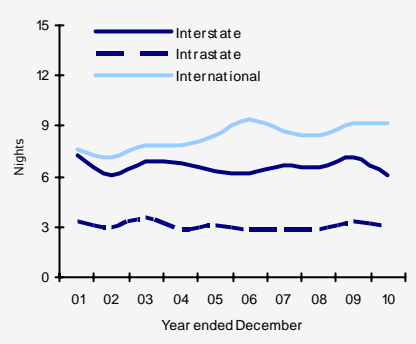
- The Sunshine Coasts' decline in domestic visitors was driven by the dominant holiday market, despite VFR (visiting friends or relatives) and business visitation increasing this did not offset the holiday decline.
- Residents of Brisbane and neighbouring Fraser Coast regions reduced their holiday visits to the Sunshine Coast, source markets which accounted for more than 66% of the regions' domestic holiday market.
- Melbourne holidaymakers reduced travel to the Sunshine Coast region, and also to TNQ, as both regions are longer stay destinations.

International visitation



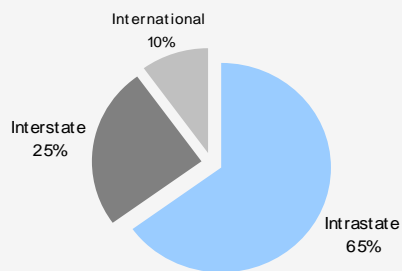
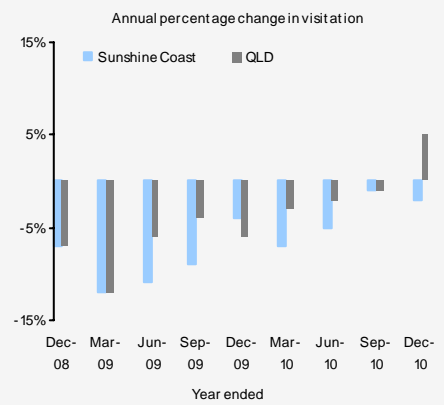
- The Sunshine Coast recorded an increase in international visitors, driven by a stronger holiday market.
- In contrast to the state trend, the Sunshine Coast was one of only a few Queensland regions to benefit from an increased number of European holiday visitors. Significant weather events and the subsequent closure of the Bruce Highway perhaps making the Sunshine Coast a hub for international holiday visitors.
- New Zealand visitors increased their holiday trips to the region whilst length of stay shortened, a trend seen by the state.
- As the US economy recovers, the Sunshine Coast is one of only a few regions in Queensland to record an increase in visitation from the US market.

Average length of stay (Sunshine Coast)



- International visitors' length of stay rose to average 9 nights in the region during 2010, driven by the VFR visitors staying longer.
- Domestic visitor average length of stay softened, as interstate holiday visitors shortened their time spent in region, and short break trips remain more favoured by domestic visitors.
- Domestic expenditure declined as holiday visitation weakened for the Sunshine Coast.
- International expenditure increased, driven from increased NZ and UK visitors, the regions largest international markets.

Total visitation



▪ There were **2,887,000** domestic and international overnight visitors to the Sunshine Coast in the year ended December 2010, this was a 2% decline on the year ended December 2009.

IMPACT OF WEATHER EVENTS IN QUEENSLAND:

Significant flooding and cyclone events occurred in Queensland in late December 2010 and continued into 2011. The full impact of these events will not be seen in tourism data until year ended March 2011 data (published in June 2011). Many of Queensland's tourism regions were affected either directly or indirectly by these weather events.

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Domestic visitation Year ended December 2010

Domestic visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,541,000	-10%	6,514,000	-21%	4.2	-0.6
VFR	818,000	9%	2,987,000	22%	3.7	0.4
Business	161,000	5%	394,000	26%	2.4	0.4
Total³	2,604,000	-3%	10,186,000	-12%	3.9	-0.4
Intrastate						
Holiday	1,119,000	-12%	3,811,000	-21%	3.4	-0.4
VFR	576,000	10%	1,448,000	15%	2.5	0.1
Business	121,000	6%	275,000	27%	2.3	0.4
Total	1,886,000	-4%	5,802,000	-11%	3.1	-0.2
Interstate						
Holiday	422,000	-3%	2,702,000	-21%	6.4	-1.5
VFR	243,000	7%	1,539,000	29%	6.3	1.1
Business	41,000	5%	119,000	25%	2.9	0.4
Total	717,000	0%	4,384,000	-14%	6.1	-1.0

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$) million	Annual % change
Sunshine Coast	4,515,000	-10%	\$358	-7%
Queensland	34,705,000	10%	\$3,717	16%
Australia	151,288,000	5%	\$14,969	2%

Nationally, and in QLD the popularity of day trips continued to build momentum, with the comparative affordability of this form of travel a key factor.

Key domestic source markets to the Sunshine Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	1,208,000	0%	3,432,000	-17%
Regional Qld	678,000	-10%	2,370,000	-1%
Sydney	215,000	11%	1,107,000	16%
Melbourne	163,000	-13%	1,181,000	-15%
Other	339,000	1%	2,096,000	-23%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,582,000	5%	71,208,000	2%
NSW	23,066,000	2%	78,330,000	2%
Victoria	15,812,000	0%	49,406,000	0%
Rest of Aus	14,156,000	-1%	60,597,000	0%
Australia	67,402,000	2%	259,541,000	1%
Holiday visitors				
Queensland	7,046,000	-4%	35,189,000	-4%
NSW	10,300,000	2%	38,454,000	-2%
Victoria	7,426,000	1%	24,860,000	1%
Rest of Aus	6,340,000	2%	28,824,000	0%
Australia	30,022,000	0%	127,328,000	-1%

The appeal of outbound travel has not waned in 2010, with this further adding to the woes of domestic tourism in Australia. Clearly, consumers are seeing value for money in outbound travel, driven by low airfares and the appreciation of the \$AUD against many currencies.



International visitation Year ended December 2010

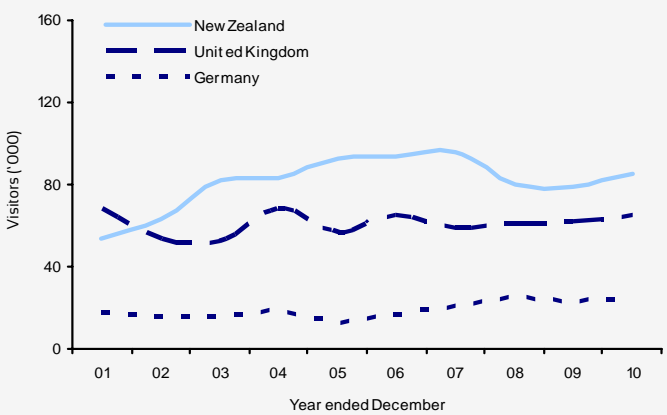
International visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	225,000	3%	1,470,000	9%	6.5	0.4
VFR	52,000	2%	681,000	19%	13.2	1.8
Business	6,000	20%	34,000	3%	5.7	-0.6
Total³	283,000	2%	2,618,000	3%	9.2	0.0

Key international source markets to the Sunshine Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	85,000	8%	727,000	9%
United Kingdom	65,000	5%	586,000	10%
Germany	25,000	9%	188,000	-15%
United States	15,000	7%	136,000	33%
Canada	11,000	-8%	77,000	-32%

New Zealand, United Kingdom and German visitors to the Sunshine Coast YE December 01 - 10



Holiday visitors				
New Zealand	61,000	13%	488,000	8%
United Kingdom	55,000	6%	322,000	4%
Germany	23,000	15%	101,000	22%
United States	10,000	-9%	59,000	69%
Canada	10,000	-9%	46,000	-35%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,048,000	4%	39,800,000	2%
NSW	2,839,000	5%	65,225,000	6%
Victoria	1,649,000	8%	40,662,000	6%
Rest of Aus	1,366,000	1%	41,024,000	8%
Australia	5,390,000	5%	186,711,000	6%

Holiday visitors				
Queensland	1,440,000	2%	18,396,000	-6%
NSW	1,610,000	4%	21,098,000	5%
Victoria	793,000	3%	8,046,000	-1%
Rest of Aus	735,000	-3%	11,708,000	-2%
Australia	2,911,000	4%	59,247,000	-1%

Recovery in international visitation to Australia was led by a strong rebound in business long-haul travel, and boosted by an increase in air capacity on key source markets routes, particularly out of Asia.



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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Year ended December 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,860,000	16%	15,233,000	16%	3.1	0.0	29%	35%	29%	29%
Gold Coast	3,396,000	6%	13,755,000	1%	4.1	-0.1	59%	29%	9%	20%
SEQC ⁴	3,018,000	8%	9,379,000	7%	3.1	0.0	43%	40%	10%	18%
Sunshine Coast	2,604,000	-3%	10,186,000	-12%	3.9	-0.4	59%	31%	6%	16%
TNQ	1,282,000	-16%	7,418,000	-6%	5.8	0.6	55%	23%	19%	8%
Toowoomba	1,238,000	1%	3,548,000	-12%	2.9	-0.4	33%	40%	20%	7%
CQ	1,124,000	-1%	3,863,000	-13%	3.4	-0.5	34%	28%	32%	7%
Capricorn	842,000	0%	3,028,000	-11%	3.6	-0.4	32%	26%	35%	5%
Townsville	837,000	11%	3,066,000	2%	3.7	-0.3	28%	28%	31%	5%
Mackay	685,000	25%	2,741,000	38%	4.0	0.4	22%	28%	45%	4%
Bundaberg	591,000	15%	2,027,000	-5%	3.4	-0.7	30%	28%	28%	4%
Fraser Coast	514,000	-10%	2,104,000	-16%	4.1	-0.2	53%	31%	11%	3%
Whitsundays	501,000	24%	2,172,000	27%	4.3	0.1	70%	17%	11%	3%
Outback	370,000	n/p	1,849,000	n/p	5.0	n/p	34%	19%	42%	2%
Gladstone	343,000	7%	1,584,000	8%	4.6	0.1	46%	31%	20%	2%
Southern Downs	334,000	n/p	779,000	n/p	2.3	n/p	53%	35%	10%	2%
Western Downs	296,000	n/p	737,000	n/p	2.5	n/p	50%	23%	21%	2%
Total	16,582,000	5%	71,208,000	2%	4.3	-0.1	42%	32%	21%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	948,000	4%	16,422,000	6%	17.3	0.3	51%	30%	12%	46%
Gold Coast	817,000	0%	8,076,000	5%	9.9	0.4	78%	15%	5%	40%
TNQ	686,000	5%	6,109,000	-2%	8.9	-0.7	91%	5%	3%	33%
Sunshine Coast	283,000	2%	2,618,000	3%	9.2	0.0	80%	18%	2%	14%
Whitsundays	204,000	-9%	1,167,000	-11%	5.7	-0.2	97%	2%	1%	10%
Fraser Coast	169,000	-10%	671,000	-6%	4.0	0.2	96%	4%	1%	8%
Townsville	131,000	-8%	1,486,000	11%	11.3	1.9	79%	11%	5%	6%
CQ	125,000	-2%	875,000	-33%	7.0	-3.2	86%	10%	5%	6%
SEQC ⁴	118,000	1%	2,120,000	2%	18.0	0.2	42%	47%	7%	6%
Capricorn	78,000	-5%	573,000	-29%	7.3	-2.5	83%	10%	4%	4%
Gladstone	63,000	3%	302,000	-40%	4.8	-3.4	90%	6%	3%	3%
Mackay	49,000	-9%	379,000	-23%	7.7	-1.4	78%	18%	4%	2%
Bundaberg	42,000	-16%	690,000	0%	16.5	2.6	79%	17%	0%	2%
Toowoomba	36,000	-10%	710,000	13%	19.8	3.9	47%	31%	11%	2%
Outback	24,000	n/p	249,000	n/p	10.6	n/p	75%	13%	8%	1%
Western Downs	12,000	n/p	157,000	n/p	13.5	n/p	58%	8%	8%	1%
Southern Downs	10,000	n/p	178,000	n/p	17.1	n/p	80%	20%	0%	0%
Total	2,048,000	4%	39,800,000	2%	19.4	-0.5	70%	24%	9%	-

Data sources: National & International Visitor Surveys, Tourism Research Australia.

1. Annual change refers to the percentage change between the year ended December 2010 vs. year ended December 2009.

2. Trend change refers to the percentage change between the 3 years to December 2009 vs. the 3 years to December 2010.

3. This figure includes "Other" visitors.

4. South East Queensland Country.

n/p not published.

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.