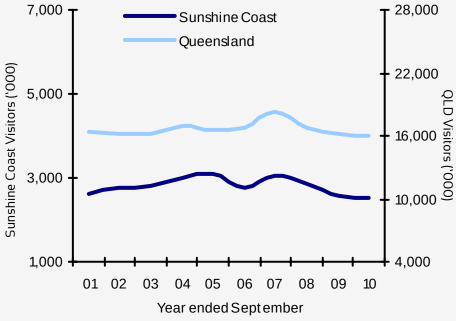
Sunshine Coast Regional Snapshot

Tourism Queensland

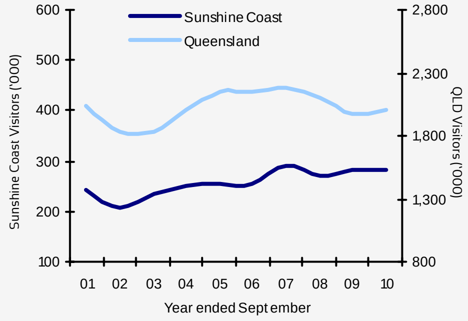
Year ended September 2010

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	2,539,000	1,557,000	774,000	125,000	$1,672
Annual change[1]	▼ -1%	▼ -5%	▲ 4%	▼ -9%	0%
Trend change[2]	▼ -6%	▼ -6%	▼ -7%	▼ -13%	0%
International overnight	282,000	224,000	52,000	7,000	$221
Annual change	0%	0%	▲ 2%	▲ 17%	▼ -4%
Trend change	▼ -1%	0%	▼ -3%	▼ -5%	0%
TOTAL	2,821,000	1,781,000	826,000	132,000	$1,893
Annual change	▼ -1%	▼ -5%	▲ 4%	▼ -8%	0%

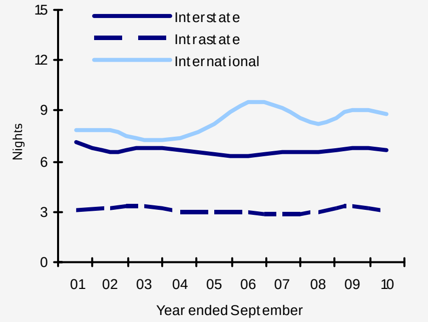
Domestic visitation



International visitation



Average length of stay (Sunshine Coast)



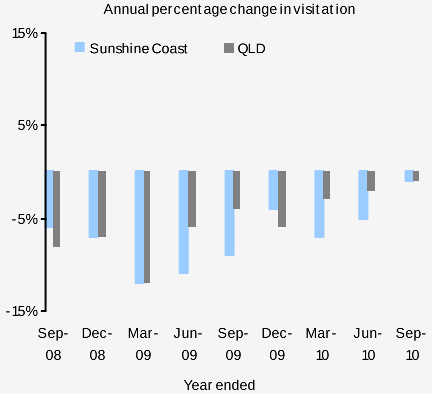
- The Sunshine Coast's domestic result reflects the downturn in Brisbane residents holidaying in the region (a trend seen by the state), Brisbane residents increased their interstate trips over the year.
- Sydney visitors returned to the Sunshine Coast for a holiday, and a resurgence from Melbourne similarly seen, particularly from the family market.
- The increase in the VFR (visiting friends or relatives) market was driven by interstate visitors, whilst the intrastate VFR market remained stable.
- The number of couples travelling to the Sunshine Coast declined overall, with the exception being residents from Brisbane travelling for a holiday over the year.

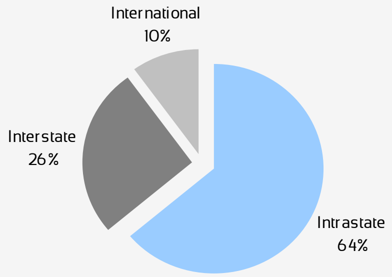
- The Sunshine Coast's international visitation stabilised over the year, a result of weaker New Zealand (NZ) and United Kingdom (UK) markets, the regions largest source of international visitors (a trend also seen at a state level).
- Youth visitors on holiday from Continental Europe continued to travel, with the Sunshine Coast one of the only regions to show an increase from this market.
- The Sunshine Coast was also one region in Queensland (besides Brisbane) to record an increase in visitation from the US market. One quarter of all US visitors who travelled to Brisbane also made a stopover on the Sunshine Coast. Perhaps the Sunshine Coast is benefitting from the additional air capacity to Brisbane from the US.

- International visitor length of stay remained lower than this time last year averaging 9 nights in region, this result was driven by a decline in the number of working holiday visitors.
- The average length of stay of intrastate visitors eased, due to short break trips remaining popular with locals and residents of surrounding regions.
- Interstate holiday visitors continued to stay an average of one week in region.
- The domestic expenditure result remained stable over the year, whilst international expenditure dipped slightly, a result of the decline in visitation and length of stay from both NZ and UK market, the regions largest sources of visitors and nights.

Total visitation

Annual percentage change in visitation





- There were **2,821,000** domestic and international overnight visitors to the Sunshine Coast in the year ended September 2010, this was a 1% decline on the year ended September 2009.

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.

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Sunshine Coast Regional Snapshot

Domestic visitation Year ended September 2010

Domestic visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,557,000	-5%	6,828,000	-10%	4.4	-0.2
VFR	774,000	4%	2,858,000	17%	3.7	0.4
Business	125,000	-9%	239,000	-22%	1.9	-0.3
Total[3]	2,539,000	-1%	10,366,000	-4%	4.1	-0.1
Intrastate						
Holiday	1,114,000	-10%	3,626,000	-22%	3.3	-0.4
VFR	535,000	0%	1,378,000	10%	2.6	0.3
Business	82,000	-20%	137,000	-37%	1.7	-0.4
Total	1,802,000	-5%	5,464,000	-13%	3.0	-0.3
Interstate						
Holiday	443,000	10%	3,202,000	9%	7.2	-0.1
VFR	240,000	17%	1,479,000	23%	6.2	0.4
Business	43,000	19%	102,000	17%	2.3	-0.1
Total	737,000	10%	4,902,000	8%	6.7	-0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Sunshine Coast	4,758,000	-5%	$372	-7%
Queensland	33,815,000	8%	$3,676	17%
Australia	151,767,000	6%	$15,520	7%

The increased trend towards day trips continued, with the comparative affordability of this type of travel a key factor.

Key domestic source markets to the Sunshine Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	1,149,000	-5%	3,400,000	-10%
Regional Qld	653,000	-7%	2,064,000	-17%
Sydney	209,000	6%	1,096,000	8%
Melbourne	196,000	26%	1,420,000	25%
Other	332,000	5%	2,386,000	0%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,960,000	-1%	70,526,000	1%
NSW	23,404,000	5%	79,719,000	4%
Victoria	15,693,000	-1%	49,976,000	1%
Rest of Aus	14,046,000	-3%	60,725,000	0%
Australia	66,834,000	1%	260,946,000	2%
Holiday visitors				
Queensland	6,969,000	-6%	34,469,000	-4%
NSW	10,420,000	3%	38,862,000	-1%
Victoria	7,341,000	-2%	24,998,000	0%
Rest of Aus	6,260,000	0%	28,635,000	0%
Australia	29,939,000	-1%	126,964,000	-1%

The business sector was the main driver for a small increase in domestic travel overall in Australia, with holiday travel easing slightly over the last year. Queensland and WA, both saw solid recovery in domestic business travel.

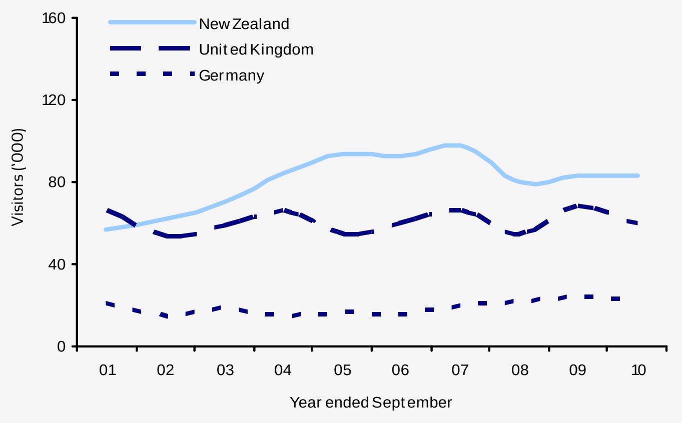
Sunshine Coast Regional Snapshot

International visitation Year ended September 2010

International visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	224,000	0%	1,352,000	-9%	6.0	-0.6
VFR	52,000	2%	637,000	22%	12.2	1.9
Business	7,000	17%	43,000	16%	6.1	-0.3
Total[3]	282,000	0%	2,479,000	-4%	8.8	-0.3

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



Key international source markets to the Sunshine Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	83,000	0%	689,000	-4%
United Kingdom	60,000	-12%	525,000	-2%
Germany	23,000	-4%	161,000	-36%
United States	16,000	23%	139,000	42%
Canada	11,000	-8%	85,000	-29%
Holiday visitors				
New Zealand	59,000	0%	474,000	-10%
United Kingdom	50,000	-11%	273,000	-11%
Germany	21,000	0%	87,000	5%
United States	11,000	22%	67,000	n/p
Canada	10,000	-9%	52,000	-42%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,013,000	2%	39,008,000	-3%
NSW	2,835,000	7%	64,797,000	9%
Victoria	1,597,000	6%	40,403,000	7%
Rest of Aus	1,357,000	1%	40,186,000	7%
Australia	5,334,000	6%	184,395,000	6%
Holiday visitors				
Queensland	1,437,000	0%	18,079,000	-9%
NSW	1,604,000	6%	21,387,000	10%
Victoria	784,000	4%	8,656,000	9%
Rest of Aus	736,000	-2%	11,514,000	-4%
Australia	2,888,000	4%	59,636,000	1%

The return in international business travel was more prominent for NSW and VIC due to their large international business markets, subsequently fuelling the growth in international visitation seen to these states and Australia overall. While Queensland saw a more modest business recovery, the international holiday market continued to pick up.

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.

Year ended September 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,306,000	-8%	14,127,000	-3%	3.3	0.2	27%	39%	27%	27%
Gold Coast	3,330,000	4%	13,372,000	-3%	4.0	-0.3	61%	27%	9%	21%
Sunshine Coast	**2,539,000**	**-1%**	**10,366,000**	**-4%**	**4.1**	**-0.1**	**61%**	**30%**	**5%**	**16%**
SEQC	2,447,000	4%	7,141,000	9%	2.9	0.1	38%	45%	11%	15%
TNQ	1,366,000	-13%	7,727,000	0%	5.7	0.8	57%	23%	17%	9%
Toowoomba	1,280,000	7%	4,069,000	15%	3.2	0.2	32%	43%	19%	8%
CQ	1,092,000	0%	3,964,000	-1%	3.6	-0.1	33%	32%	29%	7%
Capricorn	833,000	3%	3,264,000	6%	3.9	0.1	34%	28%	30%	5%
Townsville	815,000	1%	2,858,000	-17%	3.5	-0.7	28%	26%	33%	5%
Mackay	676,000	22%	2,700,000	28%	4.0	0.2	21%	25%	48%	4%
Bundaberg	554,000	8%	2,182,000	15%	3.9	0.2	35%	29%	21%	3%
Fraser Coast	546,000	-13%	2,119,000	-24%	3.9	-0.5	52%	29%	13%	3%
Whitsundays	498,000	20%	2,270,000	23%	4.6	0.1	71%	14%	11%	3%
Southern Downs	357,000	n/p	761,000	n/p	2.1	n/p	50%	33%	15%	2%
Outback	345,000	n/p	1,956,000	n/p	5.7	n/p	36%	21%	34%	2%
Gladstone	319,000	8%	1,046,000	-17%	3.3	-1.0	38%	38%	20%	2%
Western Downs	314,000	n/p	862,000	n/p	2.7	n/p	43%	29%	20%	2%
Total	15,960,000	-1%	70,526,000	1%	4.4	0.1	44%	32%	20%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	914,000	0%	16,012,000	-1%	17.5	-0.2	53%	29%	12%	45%
Gold Coast	842,000	6%	8,057,000	3%	9.6	-0.3	79%	15%	5%	42%
TNQ	672,000	1%	6,001,000	-8%	8.9	-0.9	91%	4%	3%	33%
Sunshine Coast	**282,000**	**0%**	**2,479,000**	**-4%**	**8.8**	**-0.3**	**79%**	**18%**	**2%**	**14%**
Whitsundays	208,000	-7%	1,215,000	-6%	5.8	0.0	96%	2%	1%	10%
Fraser Coast	178,000	-4%	738,000	2%	4.2	0.3	94%	5%	1%	9%
Townsville	132,000	-10%	1,451,000	9%	11.0	1.9	81%	11%	5%	7%
CQ	122,000	-5%	929,000	-19%	7.6	-1.3	87%	9%	3%	6%
SEQC	121,000	2%	1,976,000	-13%	16.4	-2.8	41%	49%	7%	6%
Capricorn	75,000	-11%	528,000	-30%	7.0	-2.0	85%	11%	4%	4%
Gladstone	62,000	2%	401,000	3%	6.5	0.1	90%	6%	3%	3%
Mackay	51,000	-6%	403,000	-11%	7.9	-0.5	76%	20%	4%	3%
Bundaberg	41,000	-20%	653,000	5%	15.9	3.6	80%	17%	0%	2%
Toowoomba	37,000	-8%	642,000	-10%	17.2	-0.5	49%	32%	11%	2%
Outback	26,000	n/p	282,000	n/p	10.7	n/p	85%	8%	4%	1%
Southern Downs	11,000	n/p	147,000	n/p	13.4	n/p	73%	18%	0%	1%
Western Downs	11,000	n/p	133,000	n/p	11.9	n/p	64%	9%	9%	1%
Total	2,013,000	2%	39,008,000	-3%	19.4	-0.8	71%	24%	8%	-

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

1. Annual change refers to the percentage change between the year ended September 2010 vs. year ended September 2009.
2. Trend change refers to the percentage change between the 3 years to September 2009 vs. the 3 years to September 2010.
3. This figure includes "Other" visitors.
4. South East Queensland Country.

n/p not published.