Sunshine Coast Regional Snapshot

Year ended March 2011

IMPORTANT MESSAGE:

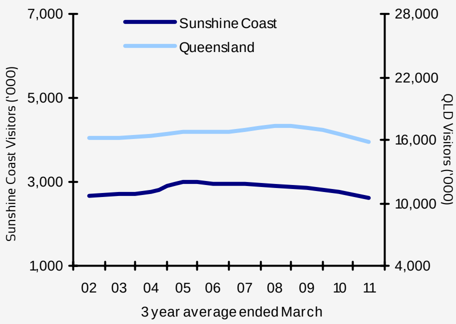
Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, domestic data for tourism regions will be presented as a 3 year average, with change over time shown as a 3 year trend change, not year on year change as in previous regional snapshots. Please note that the trend variances provided incorporate changes that occurred in tourism during the onset of the Global Financial Crisis and look at longer term trends rather than recent changes over the last year.

National and state level NVS data will be published as normal on a year ended basis.

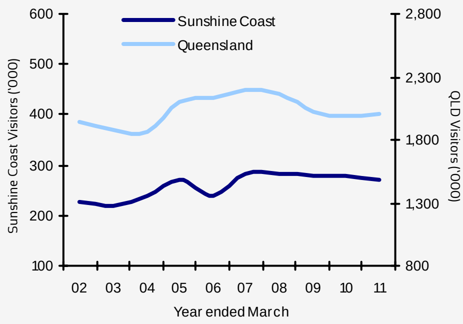
Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight 3 year average	2,615,000	1,606,000	765,000	178,000	$1,696
Trend change[1]	▼ -5%	▼ -4%	▼ -8%	▼ -1%	▼ -3%
International overnight	271,000	212,000	50,000	8,000	$239
Annual change[2]	▼ -3%	▼ -5%	▼ -4%	▲ 33%	● 0%
Trend change	▼ -2%	▼ -2%	▼ -2%	● 0%	▲ 6%

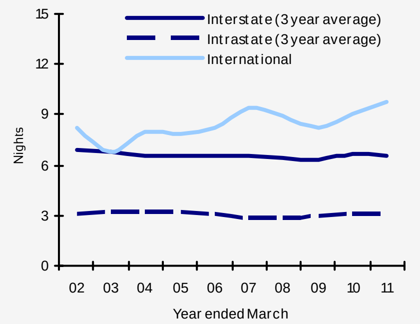
Domestic visitation



International visitation



Average length of stay (Sunshine Coast)



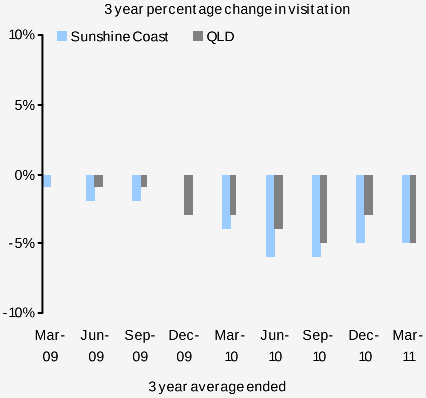
- Over the past three years, the Sunshine Coasts' decline in domestic visitors was driven by the holiday and visiting friends or relatives (VFR) markets, a trend also seen by the state.
- Those from Brisbane, particularly the VFR market reduced their trips to the region, a source market which accounts for more than 60% of the region's intrastate market. However, Sunshine Coast locals increased their overnight trips and nights spent within the region, predominantly for holiday purposes.
- Sydneysiders have reduced their travel to most Queensland regions, with holidaymakers driving the decline to the Sunshine Coast.

- The Sunshine Coast recorded a decline in international visitation due to the decline in holiday and VFR visitors, as seen on an annual and trend time period.
- The Sunshine Coast saw growth in visitors from New Zealand (NZ), the regions' largest source market, unlike the state which remained unchanged. NZ holiday visitors and their length of stay to the region continued to increase compared with the state, which has seen a decline in NZ holiday visitors.
- As the US economy continues to recover, the Sunshine Coast is one of only a few regions in Queensland to record a stable result. Queensland and most regions within the state have seen a decline in US visitation, however visitor nights to the state and region have recorded positive progress .

- International visitors' average length of stay (ALOS) rose to 10 nights to the Sunshine Coast region in the year ended March 2011, driven by VFR visitors staying longer.
- Domestic visitor ALOS remained relatively flat, with intrastate stable while interstate holiday visitors shortened their time spent in the region. Short break (3-4 nights) trips to the Sunshine Coast were still preferred by domestic visitors over the past three years.
- Domestic expenditure has declined as a result of weaker holiday visitation to the region over the past three years.
- International expenditure remained stable, easing from a strong three year trend, with the average spend per visitor at $883.

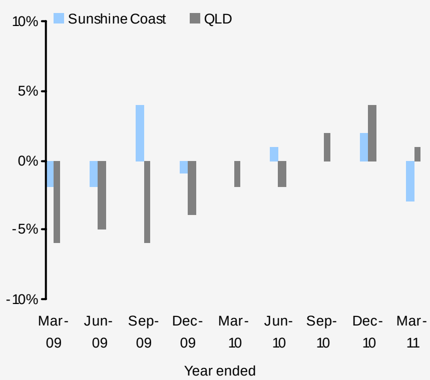
Domestic visitation

3 year percentage change in visitation



International visitation

Annual percentage change in visitation



Domestic visitation to the Sunshine Coast has declined, similar to the state's trend on a three year average percentage change.

However, international visitation to the region has varied on an annual basis, but of late the region has also attracted less visitors then the state.

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statsonq@tq.com.au

Domestic visitation

Domestic visitors to the Sunshine Coast 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	1,606,000	-4%	7,249,000	-8%	4.5	-0.2
VFR	765,000	-8%	2,554,000	-3%	3.3	0.1
Business	178,000	-1%	414,000	3%	2.3	0.1
Total[3]	2,615,000	-5%	10,560,000	-6%	4.0	-0.1
Intrastate						
Holiday	1,165,000	-2%	4,100,000	-4%	3.5	-0.1
VFR	543,000	-11%	1,280,000	-9%	2.4	0.0
Business	137,000	6%	291,000	14%	2.1	0.1
Total	1,899,000	-4%	5,874,000	-4%	3.1	0.0
Interstate						
Holiday	441,000	-8%	3,149,000	-12%	7.1	-0.3
VFR	222,000	2%	1,274,000	4%	5.7	0.1
Business	41,000	-18%	123,000	-17%	3.0	0.0
Total	716,000	-6%	4,686,000	-8%	6.5	-0.2

Key domestic source markets to the Sunshine Coast 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Brisbane	1,172,000	-6%	3,534,000	-6%
Regional Qld	727,000	-1%	2,340,000	-1%
Sydney	212,000	-8%	1,109,000	-7%
Melbourne	167,000	-6%	1,206,000	-11%
Regional NSW	160,000	-2%	850,000	-4%
Other	177,000	-6%	1,521,000	-10%

State comparison - Domestic year ended March 2011

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,037,000	3%	67,025,000	-4%
NSW	23,505,000	4%	79,124,000	3%
Victoria	16,084,000	1%	49,663,000	-1%
Rest of Aus	14,251,000	1%	61,230,000	2%
Australia	67,605,000	2%	257,042,000	0%
Holiday visitors				
Queensland	6,914,000	-1%	33,885,000	-3%
NSW	10,203,000	-1%	38,833,000	2%
Victoria	7,504,000	0%	25,048,000	-1%
Rest of Aus	6,168,000	-2%	28,744,000	-1%
Australia	29,676,000	-1%	126,510,000	-1%

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Sunshine Coast[4]	4,692,000	-6%	$399	-10%
Queensland	34,258,000	7%	$3,627	7%
Australia	151,948,000	3%	$14,950	-1%

Consumers remain budget conscious with global and domestic uncertainties continuing to subdue consumer confidence. As a result, domestic travellers are increasingly taking more affordable day trips, rather than overnight trips.

Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.

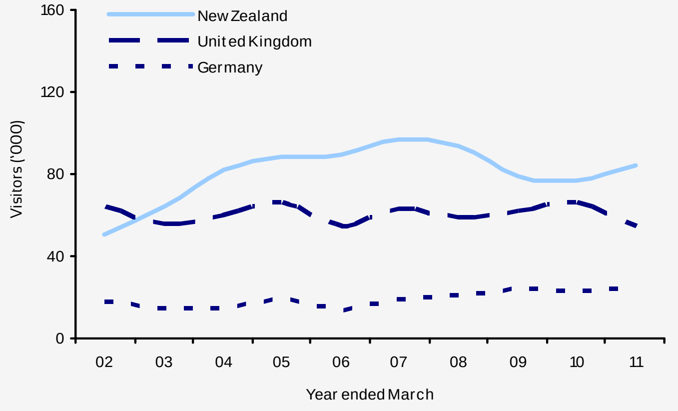
Sunshine Coast Regional Snapshot

International visitation Year ended March 2011

International visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	212,000	-5%	1,469,000	10%	6.9	0.9
VFR	50,000	-4%	696,000	24%	13.9	3.1
Business	8,000	33%	40,000	14%	5.3	-0.5
Total[3]	271,000	-3%	2,646,000	4%	9.8	0.7

New Zealand, United Kingdom and German visitors to the Sunshine Coast YE March 02-11



Key international source markets to the Sunshine Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	84,000	9%	745,000	16%
United Kingdom	55,000	-17%	475,000	-17%
Germany	24,000	4%	213,000	-2%
United States	15,000	0%	137,000	13%
Canada	10,000	-17%	74,000	-31%
Holiday visitors				
New Zealand	60,000	15%	492,000	13%
United Kingdom	46,000	-18%	291,000	-1%
Germany	22,000	5%	118,000	34%
United States	10,000	-9%	45,000	-15%
Netherlands	9,000	n/p	28,000	-10%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,002,000	1%	39,474,000	-1%
NSW	2,829,000	3%	66,266,000	7%
Victoria	1,693,000	10%	40,628,000	2%
Rest of Aus	1,394,000	3%	40,232,000	3%
Australia[5]	5,396,000	4%	186,600,000	3%
Holiday visitors				
Queensland	1,379,000	-3%	17,804,000	-8%
NSW	1,573,000	0%	20,642,000	-2%
Victoria	810,000	7%	7,910,000	-2%
Rest of Aus	755,000	1%	11,414,000	-7%
Australia[5]	2,866,000	1%	57,770,000	-5%

International tourism to Australia recovered in the year ending March 2011, boosted by long-haul business and visitation from China. Queensland saw similar trends, although growth was more subdued due to the decline in international holiday visitors, particularly those from the United Kingdom, New Zealand and the United States.

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.

Sunshine Coast Regional Snapshot

Regional visitation

Domestic Regional Comparison (3 year average to March 2011)

	Visitors	Trend% change	Nights	Trend % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,538,000	-1%	14,155,000	-1%	3.1	0.0	29%	38%	26%	28%
Gold Coast	3,243,000	-3%	13,437,000	-7%	4.1	-0.2	61%	27%	9%	20%
Sunshine Coast	**2,615,000**	**-5%**	**10,560,000**	**-6%**	**4.0**	**-0.1**	**61%**	**29%**	**7%**	**16%**
TNQ	1,384,000	-7%	7,393,000	-4%	5.3	0.2	55%	24%	17%	9%
Toowoomba	1,186,000	-5%	3,526,000	-1%	3.0	0.1	31%	41%	21%	7%
Townsville	783,000	-12%	3,011,000	-9%	3.8	0.1	33%	28%	29%	5%
Capricorn	776,000	-9%	2,847,000	-4%	3.7	0.2	33%	28%	31%	5%
Mackay	588,000	-10%	2,388,000	-9%	4.1	0.1	27%	28%	40%	4%
Fraser Coast	572,000	1%	2,326,000	-5%	4.1	-0.3	49%	33%	14%	4%
Bundaberg	513,000	-5%	1,819,000	-7%	3.5	-0.1	35%	37%	19%	3%
Whitsundays	458,000	-3%	1,973,000	1%	4.3	0.2	69%	16%	12%	3%
Outback	361,000	-10%	1,867,000	-6%	5.2	0.2	37%	19%	37%	2%
Gladstone	312,000	-4%	1,323,000	10%	4.2	0.6	46%	30%	20%	2%
Western Downs	301,000	-22%	878,000	-19%	2.9	0.1	43%	26%	24%	2%
Southern Downs	247,000	0%	586,000	-4%	2.4	-0.1	52%	31%	13%	2%
Total	15,876,000	-5%	68,430,000	-5%	4.3	0.0	44%	32%	20%	-

Please note the total for all regions uses 3 year average visitation data and trend % change to provide a meaningful point of comparison with the regional data presented. The total figures above will differ to those in the State Comparison on page 2 of this snapshot, which use year end March 2011 visitation data and year on year % change.

International Regional Comparison (Year ended March 2011)

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	926,000	1%	17,018,000	6%	18.4	0.9	49%	30%	13%	46%
Gold Coast	783,000	-6%	7,799,000	-5%	10.0	0.1	77%	16%	5%	39%
TNQ	661,000	0%	5,830,000	-7%	8.8	-0.7	91%	5%	3%	33%
Sunshine Coast	**271,000**	**-3%**	**2,646,000**	**4%**	**9.8**	**0.7**	**78%**	**18%**	**3%**	**14%**
Whitsundays	191,000	-14%	1,086,000	-15%	5.7	-0.1	96%	3%	1%	10%
Fraser Coast	151,000	-19%	565,000	-26%	3.7	-0.4	97%	4%	0%	8%
Townsville	124,000	-14%	1,361,000	-2%	11.0	1.4	78%	13%	5%	6%
Capricorn	72,000	-11%	499,000	-42%	7.0	-3.6	81%	11%	4%	4%
Gladstone	57,000	-11%	243,000	-47%	4.3	-2.9	88%	7%	5%	3%
Mackay	46,000	-16%	350,000	-20%	7.6	-0.4	76%	17%	7%	2%
Bundaberg	40,000	-13%	746,000	18%	18.6	5.0	78%	15%	0%	2%
Toowoomba	36,000	-8%	703,000	3%	19.6	2.1	44%	33%	14%	2%
Outback	24,000	-11%	253,000	-26%	10.5	-2.2	75%	13%	8%	1%
Western Downs	12,000	0%	167,000	8%	14.1	1.3	58%	17%	8%	1%
Southern Dns	10,000	25%	205,000	24%	20.0	0.6	70%	30%	0%	0%
Total	2,002,000	1%	39,474,000	-1%	19.7	-0.5	69%	25%	9%	-

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

1. Trend change refers to the percentage change between the 3 years average ended March 2010 vs. the 3 years average ended March 2011.
2. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.
3. This figure includes "Other" visitors.
4. 3 year average ended March 2011.
5. Excludes Transit visitors who did not have a stopover place.

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.