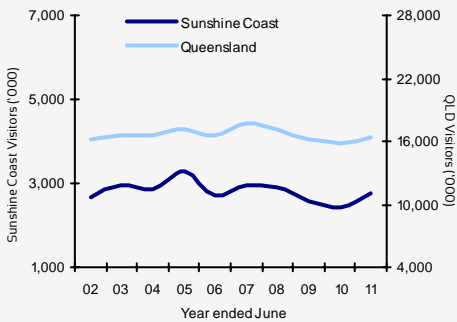


Year ended June 2011

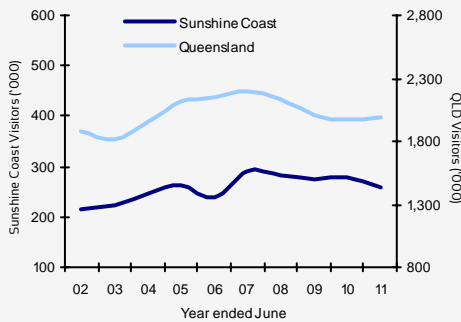


	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic overnight	2,783,000	1,602,000	790,000	272,000	\$1,729
Annual change ¹	▲ 14%	▲ 7%	▲ 2%	n/p	▲ 6%
Trend change ²	▼ -2%	▼ -2%	▼ -5%	▲ 12%	▼ -2%
International overnight	260,000	197,000	52,000	9,000	\$237
Annual change	▼ -7%	▼ -12%	▲ 4%	n/p	▲ 3%
Trend change	▼ -3%	▼ -4%	▲ 3%	▲ 5%	▲ 9%
TOTAL	3,043,000	1,799,000	842,000	281,000	\$1,966
Annual change	▼ -1%	▼ -11%	▲ 11%	▲ 27%	▲ 6%

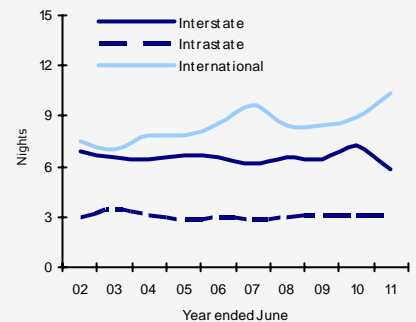
Domestic visitation



International visitation



Average length of stay (Sunshine Coast)



- The Sunshine Coast domestic market recovered in the year ending June 2011, the result of an increase in intrastate travel (73% of all visitors to the region). Most of these were older (over 30 years) couples.

- Holiday travel to the Sunshine Coast rebounded, with the region receiving more family groups and friend or relatives travelling together from Brisbane and interstate. There was also growth from the regional QLD VFR (visiting friends and relatives) market.

- The Sunshine Coast achieved increased holiday visitation from Sydney and regional NSW. The growth from Sydney was in contrast to the state trend and driven by high-income earners.

- The Sunshine Coast, like many other QLD regions, recorded a decline in holiday visitation associated with a weak UK youth (15 to 29 years) market. Travel from the UK to Australia has been soft due to instability in the UK economy and an unfavourable exchange rate.

- However, the region achieved growth from some smaller European markets, particularly those travelling on a package tour. As a result, there was only a moderate decline from the Continental European youth market.

- While there was growth in VFR and business visitation, this could not offset declines in holiday, which remains the main purpose for visiting the Sunshine Coast.

- International visitors have the longest average stay (10.3 nights) on the Sunshine Coast, compared with interstate (5.8 nights) and intrastate (3.1 nights) visitors.

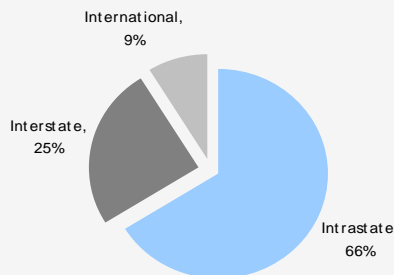
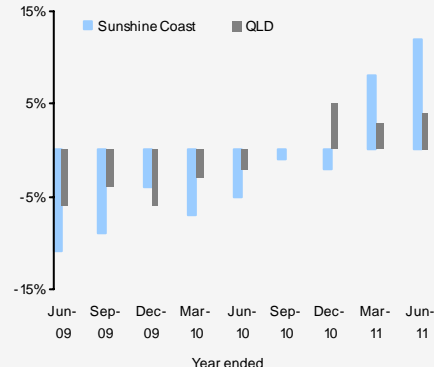
- International visitors' length of stay increased by 1.4 nights in the year ending June 2011, driven by holiday visitors staying longer. Asian visitors increased their average stay substantially (to 26 nights), driven by holiday and education.

- Domestic visitors decreased their average stay in the region. This was primarily due to a decline of 1.5 nights in interstate visitors average stay. Intrastate visitors average stay was relatively stable.

- Despite declines in international holiday visitors, overall expenditure in the Sunshine Coast increased strongly by 6%.

Total visitation

Annual percentage change in visitation



- There were **3,043,000** domestic and international overnight visitors to the Sunshine Coast in the year ended June 2011, this was a decline of 1% on the year ended June 2010.

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Domestic visitation Year ended June 2011

Domestic visitors to the Sunshine Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,602,000	7%	7,030,000	2%	4.4	-0.2
VFR	790,000	2%	2,465,000	-14%	3.1	-0.6
Business	272,000	n/p	772,000	n/p	2.8	0.8
Total³	2,783,000	14%	10,652,000	0%	3.8	-0.5
Intrastate						
Holiday	1,167,000	8%	4,180,000	16%	3.6	0.2
VFR	551,000	3%	1,178,000	-19%	2.1	-0.6
Business	202,000	n/p	530,000	n/p	2.6	0.8
Total	2,018,000	16%	6,210,000	13%	3.1	0.0
Interstate						
Holiday	434,000	4%	2,851,000	-13%	6.6	-1.3
VFR	239,000	0%	1,287,000	-9%	5.4	-0.6
Business	70,000	n/p	242,000	n/p	3.5	0.9
Total	765,000	9%	4,442,000	-13%	5.8	-1.5

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$) million	Annual % change
Sunshine Coast	4,345,000	-16%	\$369	-17%
Queensland	33,684,000	1%	\$3,408	-5%
Australia	151,915,000	1%	\$14,830	-4%

Nationally, the previous growth in day trips slowed and the amount which they spent on their trips declined. Low consumer confidence and increasing costs of living has seen domestic visitors reduce their spending on travel.

Key domestic source markets to the Sunshine Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	1,195,000	13%	3,661,000	13%
Regional Qld	822,000	20%	2,549,000	14%
Sydney	214,000	16%	1,010,000	10%
Melbourne	181,000	3%	1,142,000	-18%
Other	370,000	9%	2,291,000	-19%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,429,000	4%	68,489,000	-3%
NSW	24,106,000	5%	81,126,000	5%
Victoria	16,360,000	3%	50,005,000	0%
Rest of Aus	14,321,000	1%	60,310,000	-1%
Australia	68,944,000	4%	259,931,000	0%
Holiday visitors				
Queensland	6,960,000	-1%	34,008,000	-2%
NSW	10,234,000	-2%	39,375,000	2%
Victoria	7,724,000	3%	25,652,000	2%
Rest of Aus	6,130,000	-3%	28,313,000	-3%
Australia	29,904,000	-1%	127,349,000	0%

While domestic visitation has increased, these travellers are tending to stay closer to home, making less stopovers and are spending less. Even the previous rapid growth in outbound travel has slowed, particularly due to recent increases in the cost of airfares.



International visitation Year ended June 2011

International visitors to the Sunshine Coast

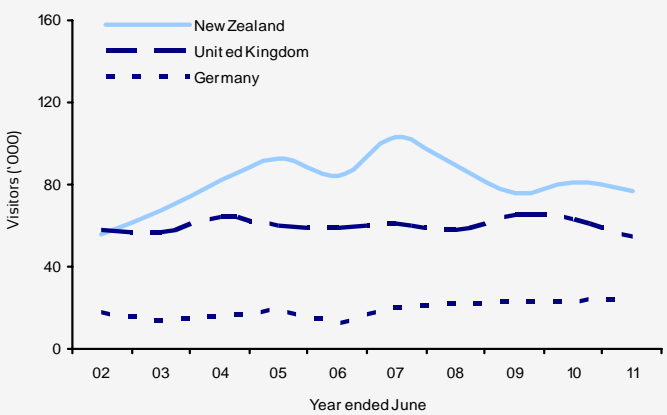
	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	197,000	-12%	1,440,000	12%	7.3	1.5
VFR	52,000	4%	654,000	7%	12.7	0.6
Business	9,000	n/p	37,000	n/p	4.4	-2.1
Total³	260,000	-7%	2,678,000	7%	10.3	1.4

Key international source markets to the Sunshine Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	77,000	-5%	725,000	9%
United Kingdom	55,000	-13%	469,000	-15%
Germany	25,000	9%	188,000	-20%
United States	15,000	-6%	166,000	39%
Scandinavia	11,000	10%	123,000	n/p

Holiday visitors				
New Zealand	52,000	-9%	451,000	0%
United Kingdom	45,000	-15%	282,000	-2%
Germany	23,000	15%	126,000	n/p
United States	10,000	-17%	84,000	n/p
Scandinavia	10,000	11%	95,000	n/p

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



State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,989,000	1%	39,644,000	2%
NSW	2,812,000	1%	67,436,000	7%
Victoria	1,734,000	12%	41,081,000	0%
Rest of Aus	1,415,000	5%	40,990,000	5%
Australia	5,416,000	4%	189,150,000	4%

Holiday visitors				
Queensland	1,345,000	-5%	17,724,000	-5%
NSW	1,565,000	0%	21,000,000	-1%
Victoria	842,000	12%	8,076,000	-5%
Rest of Aus	759,000	3%	11,543,000	-4%
Australia	2,861,000	1%	58,343,000	-4%

International visitation to Australia continued to grow, boosted by expanding air capacity and travel for VFR and business. Asian markets have remained buoyant, fuelled by increasing standards of living in these countries.



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 June 2011

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	5,045,000	18%	15,348,000	13%	3.0	-0.2	29%	36%	27%	31%
Gold Coast	3,300,000	1%	13,034,000	-6%	3.9	-0.3	56%	29%	10%	20%
Sunshine Coast	2,783,000	14%	10,652,000	0%	3.8	-0.5	58%	28%	10%	17%
TNQ	1,266,000	-10%	7,270,000	-6%	5.7	0.2	55%	19%	21%	8%
Toowoomba	1,250,000	0%	3,490,000	-11%	2.8	-0.4	32%	36%	23%	8%
Capricorn	837,000	1%	2,506,000	-21%	3.0	-0.8	33%	31%	26%	5%
Townsville	716,000	-9%	2,677,000	-20%	3.7	-0.5	34%	35%	24%	4%
Mackay	575,000	-4%	1,982,000	-16%	3.4	-0.6	25%	28%	37%	3%
Bundaberg	502,000	-4%	1,631,000	-17%	3.3	-0.4	33%	29%	30%	3%
Fraser Coast	495,000	-10%	1,775,000	-18%	3.6	-0.3	48%	30%	15%	3%
Whitsundays	490,000	6%	2,080,000	-2%	4.2	-0.4	65%	25%	9%	3%
Gladstone	408,000	22%	1,576,000	19%	3.9	-0.1	48%	28%	21%	2%
Western Downs	365,000	n/p	970,000	n/p	2.7	-0.2	51%	19%	24%	2%
Outback	310,000	n/p	1,565,000	n/p	5.0	-0.7	45%	15%	34%	2%
Southern Downs	298,000	n/p	751,000	n/p	2.5	0.4	50%	35%	12%	2%
Total	16,429,000	4%	68,489,000	-3%	4.2	-0.3	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	928,000	3%	17,116,000	8%	18.5	1.0	49%	30%	14%	47%
Gold Coast	753,000	-9%	7,723,000	-4%	10.3	0.5	77%	16%	5%	38%
TNQ	649,000	-1%	5,663,000	-7%	8.7	-0.6	91%	5%	3%	33%
Sunshine Coast	260,000	-7%	2,678,000	7%	10.3	1.4	76%	20%	3%	13%
Whitsundays	187,000	-12%	1,086,000	-6%	5.8	0.4	96%	2%	1%	9%
Fraser Coast	148,000	-17%	543,000	-28%	3.7	-0.5	95%	5%	0%	7%
Townsville	120,000	-13%	1,306,000	-8%	10.9	0.6	78%	13%	5%	6%
Capricorn	68,000	-12%	530,000	-23%	7.8	-1.1	82%	10%	4%	3%
Gladstone	55,000	-14%	251,000	-40%	4.6	-2.0	85%	9%	5%	3%
Mackay	46,000	-12%	420,000	3%	9.1	1.2	74%	20%	7%	2%
Toowoomba	39,000	5%	872,000	34%	22.4	4.6	44%	33%	13%	2%
Bundaberg	39,000	-7%	735,000	14%	19.0	3.7	74%	18%	3%	2%
Outback	24,000	n/p	255,000	n/p	10.6	-1.2	71%	13%	13%	1%
Western Downs	14,000	n/p	275,000	n/p	19.5	4.3	57%	14%	7%	1%
Southern Downs	11,000	n/p	296,000	n/p	27.3	15.8	64%	18%	9%	1%
Total	1,989,000	1%	39,644,000	2%	19.9	0.1	68%	25%	10%	-

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

1. Annual change refers to the percentage change between the year ended June 2010 vs. year ended June 2011.

2. Trend change refers to the percentage change between the 3 years to June 2010 vs. the 3 years to June 2011.

3. This figure includes "Other" visitors.

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.