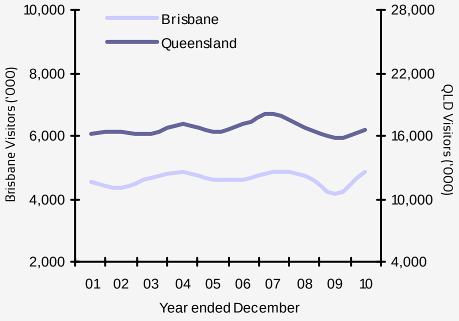
Brisbane Regional Snapshot

Year ended December 2010

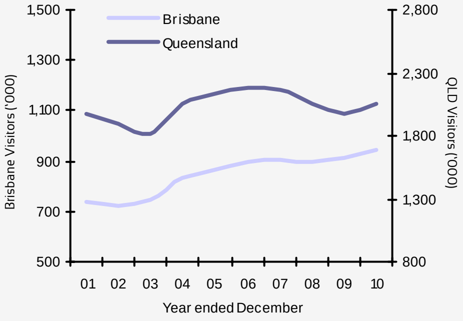
	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	4,860,000	1,393,000	1,700,000	1,388,000	$2,518
Annual change[1]	▲ 16%	▲ 17%	▲ 1%	▲ 41%	▲ 14%
Trend change[2]	0%	▲ 2%	▼ -4%	▲ 1%	▼ -2%
International overnight	948,000	487,000	286,000	115,000	$1,362
Annual change	▲ 4%	▼ -4%	▲ 13%	▲ 12%	▲ 2%
Trend change	▲ 2%	▼ -1%	▲ 6%	▲ 1%	▲ 6%
TOTAL	5,808,000	1,880,000	1,986,000	1,503,000	$3,880
Annual change	▲ 14%	▲ 10%	▲ 2%	▲ 38%	▲ 10%

Domestic visitation



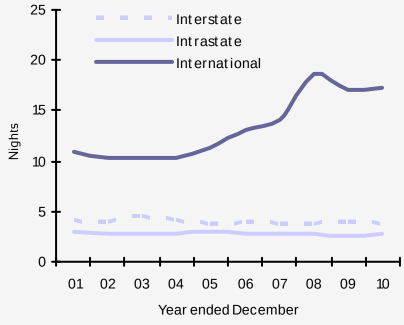
- Strong domestic results for Brisbane were heavily influenced by an increased number of Queensland residents from outside the state's capital returning to the region, and boosted further by interstate holiday and business visitation.
- Intrastate holiday growth was dominated by short break trips of 1-3 nights.
- Interstate travel to Brisbane improved strongly for holiday, visiting friends or relatives (VFR) and business in 2010. With growth from Melbourne and Sydney business markets supporting the recovery.
- Business confidence remained strong in 2010, and Queensland regions are continuing to benefit from the states strengthening resources sector.

International visitation



- In line with the state trend, Brisbane recorded a healthy increase in international visitation, the region seeing the highest number of international visitors. An increase in visiting friends or relatives (VFR) visitors has helped offset the decline in holiday visitation.
- Asian markets (particularly China and Korea) increased visitation to Brisbane, a trend also seen by the state. China remains one of Australia and Queensland's fastest growing international source markets.
- In contrast, lagging economic conditions in the United Kingdom resulted in a decline from the holiday market to Brisbane and Queensland overall.
- New Zealand holiday visitation increased, supported by a recovery in air capacity.

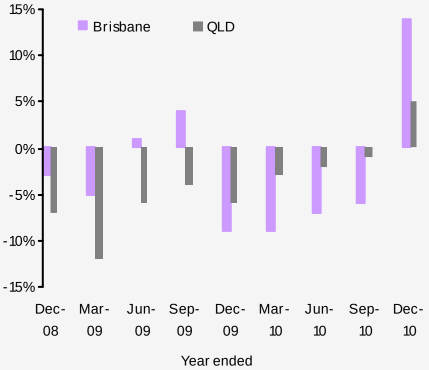
Average length of stay (Brisbane)

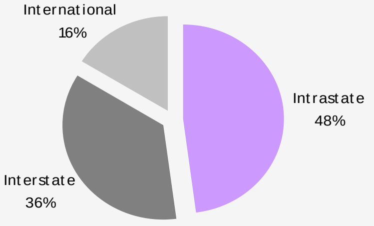


- International visitor's average length of stay was stable over the year, however holiday visitors reduced their length of stay (down 1 night).
- International expenditure increased in 2010, boosted VFR and increased travel from Asian markets.
- Domestic length of stay remained flat, however regional Victorian visitors are the longer staying domestic visitors at 5.8 nights.
- Domestic expenditure saw a strong recovery, a result of an increase in Brisbane and regional Queensland residents holidaying in Brisbane; and further supported by growth in the business market.

Total visitation

Annual percentage change in visitation





- There were **5,808,000** international and domestic overnight visitors to Brisbane in the year ended December 2010, this was a 14% increase 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.

Brisbane Regional Snapshot

Domestic visitation Year ended December 2010

Domestic visitors to Brisbane

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,393,000	17%	4,340,000	12%	3.1	-0.2
VFR	1,700,000	1%	6,067,000	2%	3.6	0.1
Business	1,388,000	41%	3,404,000	37%	2.5	0.0
Total[3]	4,860,000	16%	15,233,000	16%	3.1	0.0
Intrastate						
Holiday	924,000	24%	2,521,000	35%	2.7	0.2
VFR	939,000	-3%	2,419,000	-3%	2.6	0.0
Business	636,000	66%	1,415,000	43%	2.2	-0.4
Total	2,779,000	20%	7,427,000	28%	2.7	0.2
Interstate						
Holiday	469,000	4%	1,820,000	-10%	3.9	-0.6
VFR	761,000	6%	3,648,000	5%	4.8	0.0
Business	752,000	25%	1,989,000	34%	2.6	0.1
Total	2,081,000	12%	7,806,000	7%	3.8	-0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Brisbane	11,210,000	8%	$1,159	17%
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 Brisbane

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	2,191,000	26%	5,893,000	28%
Regional NSW	626,000	19%	2,213,000	13%
Sydney	608,000	0%	1,778,000	-17%
Brisbane	588,000	2%	1,534,000	26%
Melbourne	364,000	26%	1,309,000	15%
Other	482,000	11%	2,506,000	20%

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.

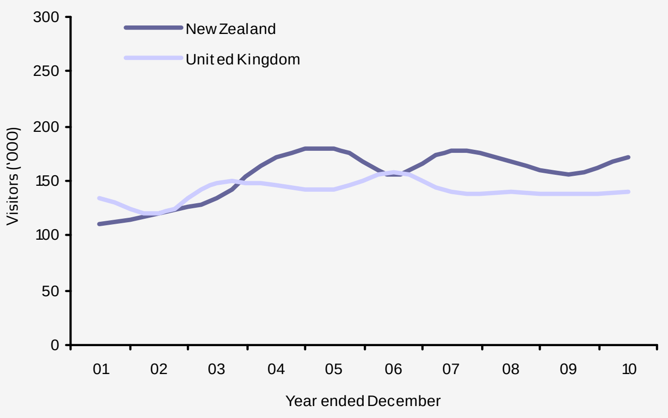
Brisbane Regional Snapshot

International visitation Year ended December 2010

International visitors to Brisbane

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	487,000	-4%	4,751,000	-15%	9.8	-1.1
VFR	286,000	13%	4,195,000	19%	14.7	0.9
Business	115,000	12%	806,000	41%	7.0	1.5
Total[3]	948,000	4%	16,422,000	6%	17.3	0.3

New Zealand and United Kingdom visitors to Brisbane
YE December 01 - 10



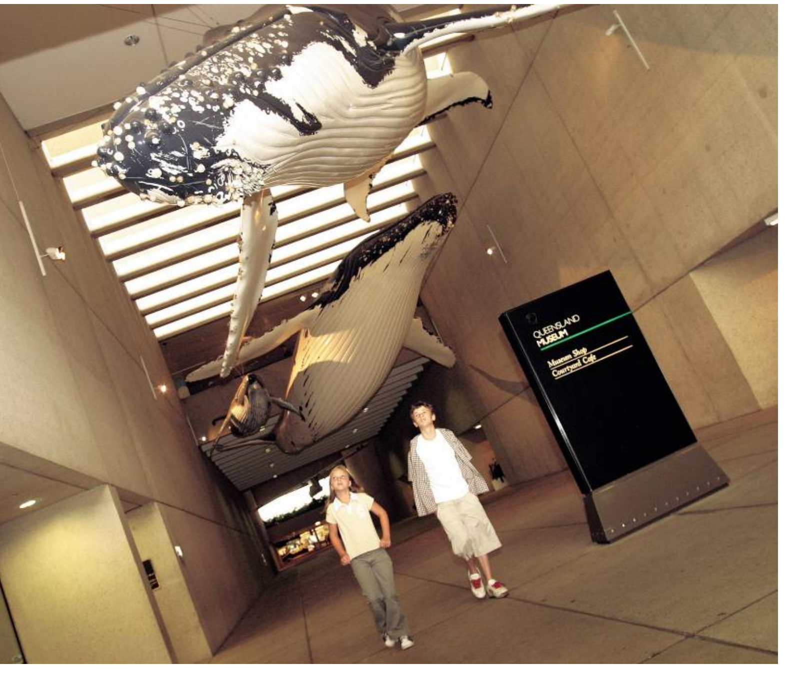
Key international source markets to Brisbane

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	172,000	10%	1,406,000	4%
United Kingdom	141,000	1%	1,686,000	-9%
China	83,000	32%	1,888,000	61%
United States	55,000	-10%	637,000	8%
Germany	49,000	-2%	567,000	-3%
Holiday visitors				
United Kingdom	85,000	-15%	666,000	-39%
China	51,000	24%	170,000	39%
New Zealand	50,000	9%	268,000	-6%
Germany	38,000	0%	300,000	-19%
Korea	26,000	24%	852,000	-13%

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 Brisbane tourism region aligns with the ABS Brisbane region, extending across Gatton and Ipswich, Caboolture, Logan and Brisbane city.

Brisbane Regional Snapshot

Tourism Queensland

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.