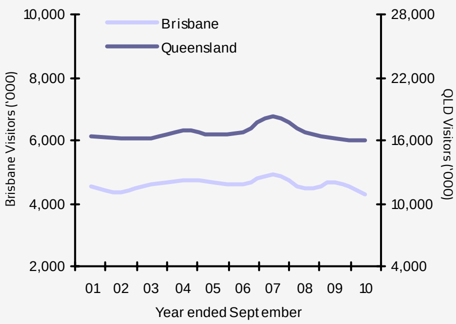
Brisbane Regional Snapshot

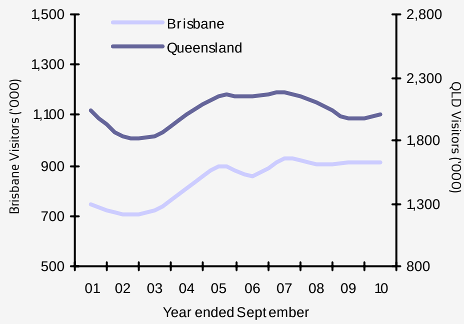
Year ended September 2010

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	4,306,000	1,183,000	1,670,000	1,158,000	$2,269
Annual change[1]	▼ -8%	▼ -11%	▼ -6%	▼ -3%	▼ -8%
Trend change[2]	▼ -4%	▼ -4%	▼ -5%	▼ -4%	▼ -5%
International overnight	914,000	481,000	268,000	107,000	$1,362
Annual change	0%	▼ -5%	▲ 6%	▲ 4%	▲ 2%
Trend change	▼ -1%	▼ -3%	▲ 5%	▼ -2%	▲ 7%
TOTAL	5,220,000	1,664,000	1,938,000	1,265,000	$3,631
Annual change	▼ -6%	▼ -9%	▼ -5%	▼ -2%	▼ -4%

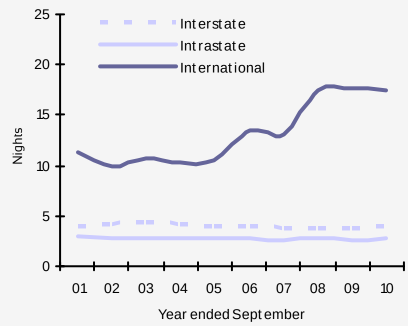
Domestic visitation



International visitation



Average length of stay (Brisbane)



▪ Brisbane continued to be impacted by the decline in intrastate holiday travel, notably from Brisbane residents increasing their trips interstate over the year. The pattern of travel seen in the past year is in contrast to the trend witnessed throughout the GFC when Brisbane benefitted from more residents of South East Queensland (and Brisbane itself) travelling closer to home.

▪ Family groups (from Victoria and Regional Queensland) increased their holiday travel to Brisbane, as did the number of couples holidaying in the states capital.

▪ Brisbane's large VFR (visiting friends or relatives) market softened, perhaps a side effect of the increase in interstate and holiday travel.

▪ International visitation remained steady for Brisbane, buoyed by the recovery in VFR and business travel.

▪ The decline from the United Kingdom (UK) market has impacted Brisbane more so than many other regions, as Brisbane is the states most visited destination for UK visitors. Strong results from a range of European markets and from China however, absorbed some of the impact from the downturn in this market .

▪ International visitors on a holiday continued to favour drive as the mode of transport on their trip to Brisbane, (a large proportion being European visitors), this perhaps also assisted the increase in preference for caravan, camping and commercial accommodation over the year.

▪ International visitors average length of stay continued to ease, driven by a downturn in working holiday visitors, however this decline was partially offset by a marginal increase in education visitors length of stay.

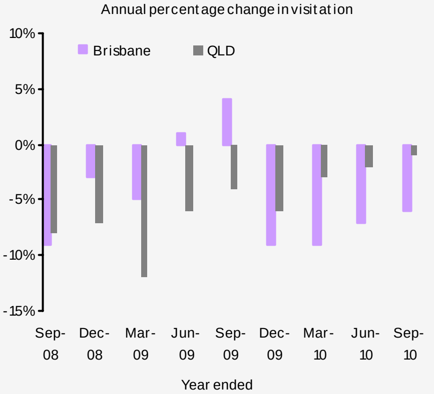
▪ International holiday visitors (excluding working holiday) stayed an average of 6 nights in Brisbane over the past year, and remained stable over the year.

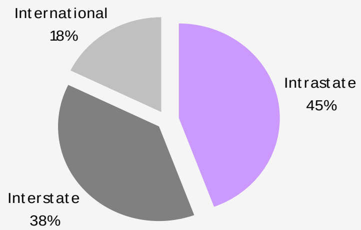
▪ Domestic expenditure was lower than the same time last year, and can be attributed to the downturn in the number of Brisbane residents holidaying closer to home.

▪ International visitor expenditure increased over the year, driven by an increased number of education visitors staying longer, and further supported by an upswing from the longer staying VFR market.

Total visitation

Annual percentage change in visitation





▪ There were **5,220,000** international and domestic overnight visitors to Brisbane in the year ended September 2010, this was a 6% 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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Brisbane Regional Snapshot

Domestic visitation Year ended September 2010

Domestic visitors to Brisbane

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,183,000	-11%	3,859,000	-9%	3.3	0.1
VFR	1,670,000	-6%	6,133,000	1%	3.7	0.3
Business	1,158,000	-3%	2,999,000	-1%	2.6	0.0
Total[3]	4,306,000	-8%	14,127,000	-3%	3.3	0.2
Intrastate						
Holiday	745,000	-12%	2,014,000	-4%	2.7	0.2
VFR	966,000	-7%	2,652,000	2%	2.7	0.2
Business	416,000	-16%	967,000	-25%	2.3	-0.3
Total	2,338,000	-12%	6,473,000	-5%	2.8	0.2
Interstate						
Holiday	438,000	-9%	1,845,000	-13%	4.2	-0.2
VFR	704,000	-6%	3,481,000	1%	4.9	0.3
Business	742,000	6%	2,032,000	16%	2.7	0.2
Total	1,969,000	-2%	7,654,000	-1%	3.9	0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Brisbane	11,200,000	7%	$1,242	35%
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 Brisbane

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	1,801,000	-12%	5,152,000	-7%
Sydney	594,000	-13%	1,890,000	-16%
Regional NSW	573,000	3%	2,236,000	19%
Brisbane	536,000	-10%	1,321,000	5%
Melbourne	334,000	-1%	1,161,000	-20%
Other	467,000	6%	2,368,000	8%

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%

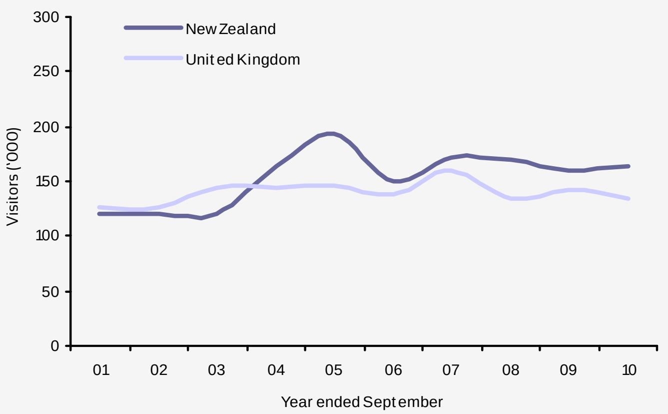
The business sector was the main driver for a small increase in domestic travel overall in Australia, with holiday travel easing slightly over the last year. Queensland and WA, both saw solid recovery in domestic business travel.

International visitation Year ended September 2010

International visitors to Brisbane

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	481,000	-5%	4,477,000	-22%	9.3	-2.0
VFR	268,000	6%	4,070,000	20%	15.2	1.8
Business	107,000	4%	730,000	28%	6.8	1.3
Total[3]	914,000	0%	16,012,000	-1%	17.5	-0.2

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



Key international source markets to Brisbane

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	164,000	2%	1,202,000	-23%
United Kingdom	134,000	-6%	1,724,000	-6%
China	74,000	32%	1,838,000	82%
United States	59,000	2%	680,000	51%
Germany	46,000	-8%	534,000	-32%
Holiday visitors				
United Kingdom	85,000	-13%	775,000	-21%
New Zealand	48,000	-6%	244,000	-27%
China	45,000	29%	152,000	31%
Germany	36,000	-5%	292,000	-33%
United States	28,000	-7%	145,000	-6%

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 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 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.