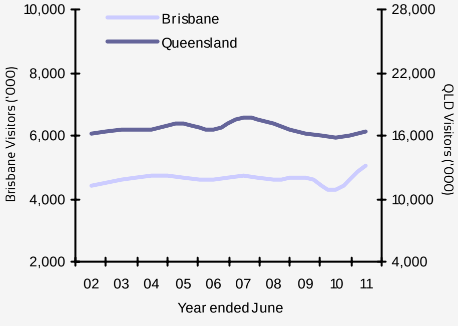
Brisbane Regional Snapshot

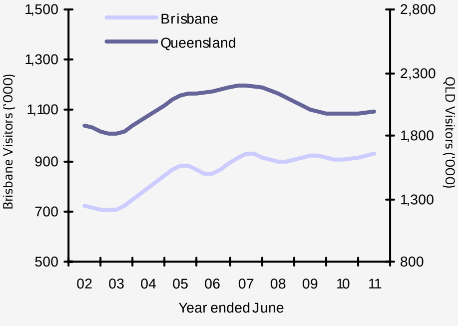
Year ended June 2011

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	5,045,000	1,445,000	1,834,000	1,384,000	$2,552
Annual change[1]	▲ 18%	▲ 24%	▲ 7%	▲ 27%	▲ 17%
Trend change[2]	▲ 3%	▲ 4%	● 0%	▲ 6%	▼ -3%
International overnight	928,000	455,000	275,000	128,000	$1,413
Annual change	▲ 3%	▼ -6%	▲ 4%	▲ 21%	▲ 4%
Trend change	▲ 1%	▼ -3%	▲ 5%	▲ 5%	▲ 1%
TOTAL	5,973,000	1,900,000	2,109,000	1,512,000	$3,965
Annual change	▲ 16%	▲ 15%	▲ 6%	▲ 27%	▲ 12%

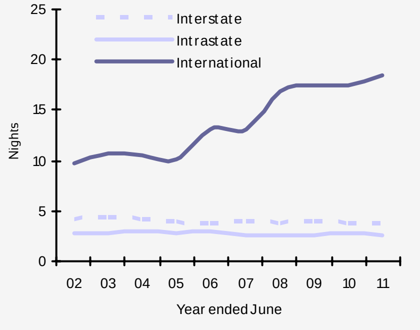
Domestic visitation



International visitation



Average length of stay (Brisbane)

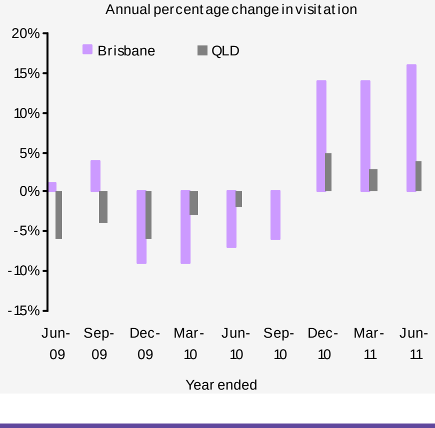


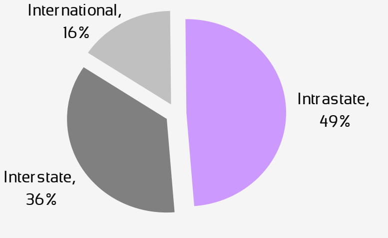
- Brisbane recorded increases in domestic visitation, with strong growth in the December and June quarters. This growth offset declines in the March quarter attributable to the floods.
- Visitation growth was driven by business and holiday. This trend was reflected in the visitors choice of accommodation, with increases hotels, motels and serviced apartments (up 13%). However, some holiday visitors opted for more affordable accommodation, such as staying with friends and relatives.
- There was growth in regional QLD and regional NSW residents travelling to the state's capital. Interstate travel to Brisbane increased driven by VFR (visiting friends or relatives).
- Intrastate VFR travel declined by 1%. Despite this, the market continues to account for over 1 million visitors (17% of all visitors) to the region.

- Brisbane, unlike most other QLD regions, saw an increase in international visitation. Growth was mainly from the Chinese, Singapore and New Zealand markets.
- Growth in visitation was driven by business and VFR. Nights grew strongly being driven by education. Education visitors account for 37% of all visitor nights spent in Brisbane.
- Despite this, holiday visitors to Brisbane continued to decline, following the state trend. This was the result of declines from the United Kingdom (UK), Europe and the United States (US) youth markets.
- The youth market from these countries has been soft, the result of low consumer confidence, high youth unemployment and a strong Australian dollar.

- International visitor's average length of stay increased by 1 night in the year ending June 2011, primarily driven by the education sector.
- Domestic length of stay declined slightly, with intrastate travellers decreasing their average stay in the region and interstate travellers remaining flat.
- Intrastate domestic travellers spend on average 2.5 nights in Brisbane, while interstate travellers stay for an average of 3.8 nights. International travellers, however, stay for far longer, spending an average of 18.5 nights in Brisbane, driven by the education sector.
- Total expenditure in Brisbane has been recovering (up 12%), driven primarily by an increase in domestic travellers to the region.

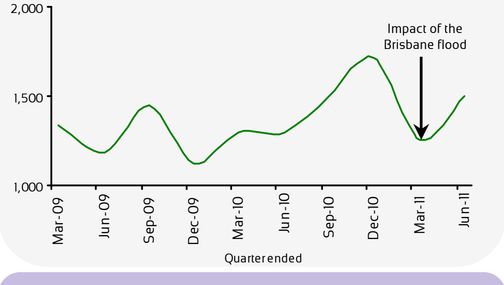
Total visitation





- There were **5,973,000** international and domestic overnight visitors to Brisbane in the year ended June 2011, this was an increase of 16% on the year ended June 2010.

Quarterly total visitation to Brisbane ('000)



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Brisbane Regional Snapshot

Domestic visitation Year ended June 2011

Domestic visitors to Brisbane

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,445,000	24%	4,241,000	14%	2.9	-0.3
VFR	1,834,000	7%	6,175,000	1%	3.4	-0.1
Business	1,384,000	27%	3,324,000	12%	2.4	-0.3
Total[3]	5,045,000	18%	15,348,000	13%	3.0	-0.2
Intrastate						
Holiday	948,000	26%	2,253,000	13%	2.4	-0.2
VFR	1,017,000	-1%	2,321,000	-18%	2.3	-0.5
Business	647,000	n/p	1,598,000	n/p	2.5	-0.2
Total	2,897,000	24%	7,289,000	13%	2.5	-0.3
Interstate						
Holiday	496,000	20%	1,988,000	15%	4.0	-0.2
VFR	818,000	17%	3,854,000	17%	4.7	0.0
Business	737,000	4%	1,726,000	-10%	2.3	-0.4
Total	2,148,000	12%	8,058,000	12%	3.8	0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Brisbane	11,602,000	5%	$1,068	-10%
Queensland	33,684,000	1%	$3,408	-5%
Australia	151,288,000	5%	$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 Brisbane

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	2,281,000	28%	5,737,000	12%
Regional NSW	648,000	17%	2,319,000	14%
Brisbane	617,000	11%	1,553,000	16%
Sydney	605,000	-2%	1,718,000	-18%
Melbourne	377,000	30%	1,468,000	n/p
Other	519,000	14%	2,553,000	23%

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.

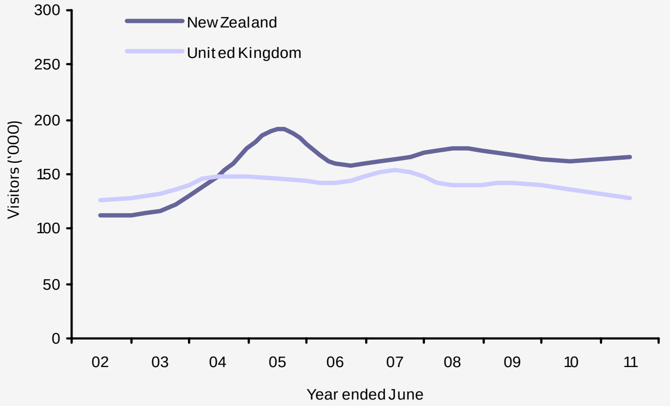
Brisbane Regional Snapshot

International visitation Year ended June 2011

International visitors to Brisbane

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	455,000	-6%	4,752,000	-4%	10.4	0.2
VFR	275,000	4%	4,147,000	6%	15.1	0.3
Business	128,000	21%	865,000	23%	6.7	0.1
Total[3]	928,000	3%	17,116,000	8%	18.5	1.0

New Zealand and United Kingdom visitors to Brisbane YE June 02 - 11



Key international source markets to Brisbane

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	166,000	3%	1,435,000	18%
United Kingdom	129,000	-6%	1,527,000	-20%
China	83,000	28%	2,241,000	32%
United States	57,000	-8%	568,000	-20%
Germany	47,000	-6%	605,000	2%
Holiday visitors				
United Kingdom	76,000	-16%	501,000	-47%
New Zealand	47,000	-4%	303,000	24%
China	45,000	15%	128,000	-7%
Germany	36,000	-5%	344,000	-4%
Korea	26,000	18%	1,089,000	33%

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 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 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.