

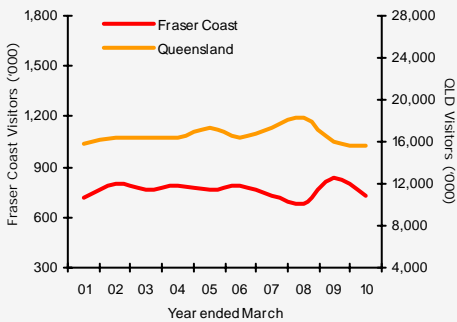
Fraser Coast Regional Snapshot

Year ended March 2010

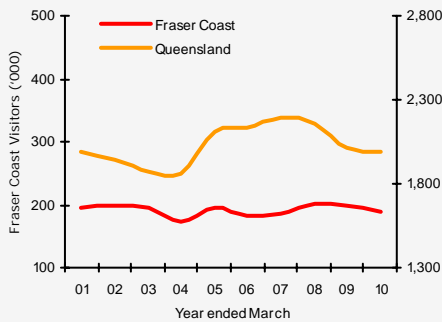


	Visitors	Holiday	VFR	Business
Domestic overnight	734,000	343,000	253,000	106,000
Annual change ¹	▼ -12%	▼ -5%	▼ -29%	▲ 5%
Trend change ²	0%	▼ -2%	0%	▲ 3%
International overnight	190,000	180,000	9,000	n/p
Annual change	▼ -4%	▼ -4%	▼ -10%	n/p
Trend change	▲ 1%	0%	▲ 8%	n/p
TOTAL	924,000	523,000	262,000	n/p
Annual change	▼ -10%	▼ -5%	▼ -28%	n/p

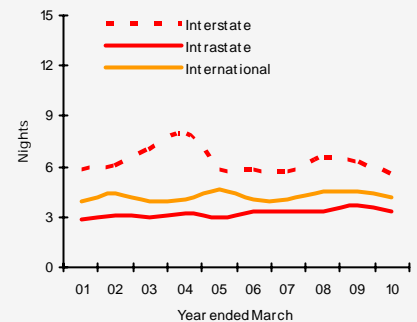
Domestic visitation



International visitation



Average length of stay (Fraser Coast)



Recent domestic results for the Fraser Coast have been heavily influenced by the ongoing downturn in the VFR (visiting friends or relatives) market and particularly those from Brisbane.

Brisbane residents have increased their interstate travel and this may have contributed to the Fraser Coast seeing a decline in VFR and holiday travel. Despite this, the region saw growth from its largest source of domestic visitors, intrastate holiday-makers, driven by residents from other parts of South East Queensland.

Families and the caravan and camping sector again bolstered the intrastate holiday market for the Fraser Coast.

Interstate holiday visitation continued to decline in the year to March 2010 due to fewer Sydney residents visiting Queensland generally, and less air capacity from Sydney.

The Fraser Coast saw a reduction in the number of international visitors making a stopover in the region, with fewer visitors from New Zealand, North America and countries most heavily impacted by the aftermath of the Global Financial Crisis, such as Ireland.

Declines from North America were caused by visitors over 30 years old, with the youth market (under 30 years old) remaining resilient. Although the region saw a decline in its largest Continental European market, Germany, the German youth market remained stronger.

The Fraser Coast saw a stable result overall from the United Kingdom (UK) with the number of youth visitors continuing to grow.

More than three quarters of all international visitors to the region are from either the UK or Continental Europe.

The declines seen in both intrastate and interstate length of stay were the result of a reduction in the length of stay of VFR visitors.

In contrast, the average length of stay for intrastate holiday visitors, the main source of visitor nights for the Fraser Coast, remained stable at 4-5 nights.

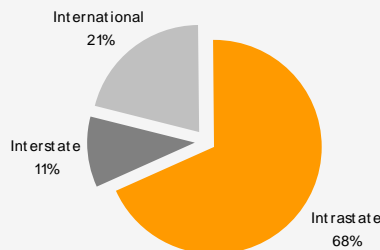
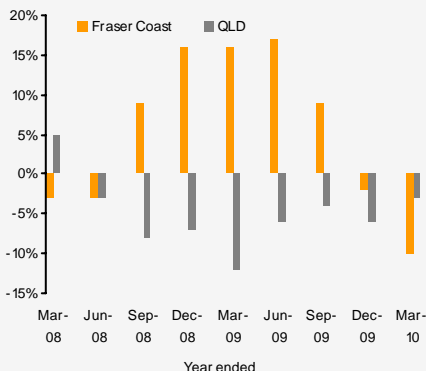
The region also saw interstate holiday visitors increase their length of stay to over 6 nights.

Visitors from the UK and Continental Europe continue to spend approximately 4 nights on the Fraser Coast.

While the length of stay for European visitors remained stable over the last year, the region has seen a gradual erosion in the length of stay of visitors from the UK, with these visitors now staying longer in Brisbane and the Sunshine Coast.

Total visitation

Annual percentage change in visitation



There were **924,000** (total domestic and international) overnight visitors to Fraser Coast in the year ended March 2010, this was a 10% decline on the year ended March 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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Domestic visitors to Fraser Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	343,000	-5%	1,615,000	-1%	4.7	0.2
VFR	253,000	-29%	733,000	n/p	2.9	-1.3
Business	106,000	5%	216,000	-25%	2.0	-0.8
Total³	734,000	-12%	2,649,000	-24%	3.6	-0.5
Intrastate						
Holiday	283,000	6%	1,233,000	6%	4.4	0.1
VFR	219,000	-29%	559,000	n/p	2.5	-0.9
Business	103,000	3%	210,000	-26%	2.0	-0.8
Total	627,000	-9%	2,057,000	-19%	3.3	-0.4
Interstate						
Holiday	60,000	-35%	382,000	-17%	6.3	1.3
VFR	34,000	n/p	174,000	n/p	5.1	-4.5
Total	106,000	-28%	593,000	-36%	5.6	-0.7

Key domestic source markets to Fraser Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	419,000	2%	1,146,000	-30%
Brisbane	209,000	-24%	911,000	3%
NSW	60,000	-32%	250,000	-50%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,531,000	-3%	69,857,000	2%
NSW	22,692,000	-2%	76,685,000	-3%
Victoria	15,856,000	-1%	50,044,000	2%
Rest of Aus	14,123,000	-5%	60,010,000	-6%
Australia	65,997,000	-3%	256,596,000	-1%
Holiday visitors				
Queensland	6,974,000	-4%	34,955,000	1%
NSW	10,262,000	0%	38,183,000	-3%
Victoria	7,478,000	1%	25,338,000	5%
Rest of Aus	6,297,000	0%	29,074,000	0%
Australia	29,912,000	-1%	127,550,000	0%

Holiday travel declined nationally, although an increase in interstate holiday visitors was recorded in Australia for the first time since 2007. QLD's holiday decline was offset by an increase in holiday nights and holiday expenditure over the year.

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Fraser Coast	986,000	12%	n/p	n/p
Queensland	32,040,000	8%	\$3,380	9%
Australia	147,501,000	9%	\$15,095	7%

The growing trend towards day trips continues to gain momentum, with the comparative affordability of this form of travel a key influence.



Fraser Coast Regional Snapshot

International visitation Year ended March 2010

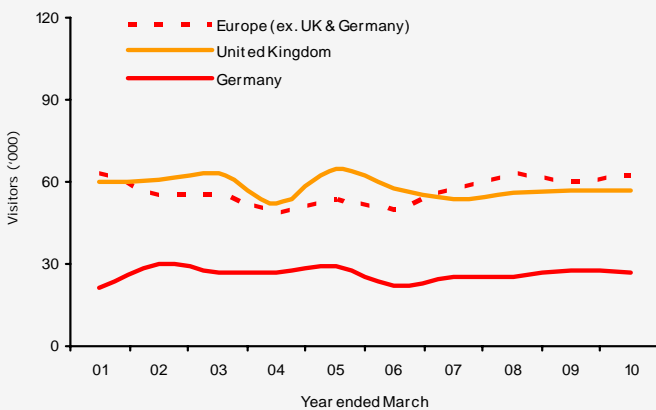
International visitors to Fraser Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	180,000	-4%	621,000	-11%	3.4	-0.3
VFR	9,000	-10%	140,000	-7%	15.1	0.3
Total⁴	190,000	-4%	790,000	-11%	4.2	-0.3

Key international source markets to Fraser Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	62,000	3%	238,000	14%
United Kingdom	57,000	0%	216,000	-17%
Germany	27,000	-4%	84,000	-29%
New Zealand	11,000	-27%	71,000	-3%

European, United Kingdom and German visitors to Fraser Coast YE March 01 - 10



State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,986,000	-2%	40,038,000	3%
NSW	2,754,000	1%	62,057,000	3%
Victoria	1,539,000	4%	39,677,000	11%
Rest of Aus	1,356,000	2%	39,021,000	6%
Australia	5,211,000	3%	180,793,000	5%

Holiday visitors				
Queensland	1,426,000	-3%	19,416,000	2%
NSW	1,569,000	2%	20,961,000	12%
Victoria	754,000	0%	8,069,000	1%
Rest of Aus	747,000	0%	12,314,000	6%
Australia	2,824,000	1%	60,759,000	6%

Queensland's more modest recovery in international visitation than the nation was driven by a subdued VFR result, and the ongoing declines from Japan. Positively however, an increase in international visitation in the March quarter 2010 (compared with the March quarter 2009) was recorded.



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 Fraser Coast region covers the ABS Hervey Bay / Maryborough region, excluding Cooloola and Gympie.

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Fraser Coast Regional Snapshot

Year ended March 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,128,000	-11%	13,301,000	-9%	3.2	0.0	27%	42%	25%	27%
Gold Coast	3,148,000	-2%	13,512,000	-1%	4.3	0.0	62%	27%	8%	20%
Sunshine Coast	2,468,000	-8%	11,039,000	5%	4.5	0.6	63%	30%	5%	16%
SEQC ⁵	2,309,000	0%	6,379,000	-7%	2.8	-0.2	39%	42%	15%	15%
TNQ	1,499,000	4%	8,030,000	17%	5.4	0.6	54%	24%	19%	10%
CQ	1,172,000	24%	4,490,000	33%	3.8	0.2	35%	30%	27%	8%
Toowoomba	1,039,000	8%	3,389,000	30%	3.3	0.6	30%	40%	24%	7%
Townsville	766,000	-9%	3,079,000	0%	4.0	0.3	41%	24%	26%	5%
Fraser Coast	734,000	-12%	2,649,000	-24%	3.6	-0.5	47%	34%	14%	5%
Mackay	590,000	-6%	2,079,000	-28%	3.5	-1.1	24%	20%	49%	4%
Capricorn	927,000	31%	3,704,000	n/p	4.0	0.7	33%	26%	31%	6%
Bundaberg	489,000	-2%	2,148,000	36%	4.4	1.2	33%	39%	15%	3%
Whitsundays	449,000	-3%	1,961,000	4%	4.4	0.4	69%	18%	8%	3%
Outback	378,000	-2%	2,163,000	16%	5.7	0.9	41%	13%	38%	2%
Gladstone	284,000	-1%	1,198,000	19%	4.2	0.7	44%	40%	9%	2%
Western Downs	281,000	-16%	926,000	-10%	3.3	0.2	33%	37%	22%	2%
Southern Downs	261,000	n/p	558,000	19%	2.1	-0.7	60%	21%	17%	2%
Total	15,531,000	-3%	69,857,000	2%	4.5	0.2	45%	32%	19%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	918,000	2%	16,043,000	2%	17.5	0.1	55%	28%	11%	46%
Gold Coast	829,000	5%	8,184,000	7%	9.9	0.2	80%	15%	4%	42%
TNQ	659,000	-9%	6,250,000	-4%	9.5	0.5	91%	5%	3%	33%
Sunshine Coast	280,000	0%	2,549,000	11%	9.1	0.9	79%	19%	2%	14%
Whitsundays	222,000	2%	1,284,000	-1%	5.8	-0.1	96%	3%	1%	11%
Fraser Coast	190,000	-4%	790,000	-11%	4.2	-0.3	95%	5%	1%	10%
Townsville	144,000	-1%	1,383,000	9%	9.6	0.9	82%	13%	3%	7%
CQ	130,000	7%	1,327,000	33%	10.2	2.0	85%	10%	5%	7%
SEQC	118,000	-1%	2,181,000	1%	18.5	0.4	42%	50%	5%	6%
Capricorn	81,000	4%	866,000	n/p	10.6	4.5	85%	10%	4%	4%
Gladstone	64,000	14%	461,000	-12%	7.2	-2.2	86%	8%	5%	3%
Mackay	55,000	4%	437,000	21%	8.0	1.2	76%	18%	4%	3%
Bundaberg	46,000	2%	633,000	10%	13.6	0.9	80%	17%	2%	2%
Toowoomba	36,000	-3%	651,000	9%	18.2	1.9	50%	33%	6%	2%
Outback	27,000	-13%	343,000	-23%	12.7	-1.4	89%	4%	4%	1%
Western Downs	12,000	0%	155,000	19%	12.8	2.4	75%	17%	0%	1%
Southern Downs	8,000	33%	165,000	2%	19.4	-5.7	75%	13%	0%	0%
Total	1,986,000	-2%	40,038,000	3%	20.2	0.9	72%	24%	8%	-

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

1. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2009.
 2. Trend change refers to the percentage change between the 3 years to March 2009 vs. the 3 years to March 2010.
 3. This figure includes "Other" visitors.
 4. This figure includes "Business" and "Other" visitors.
 5. South East Queensland Country.
- n/p – not published.