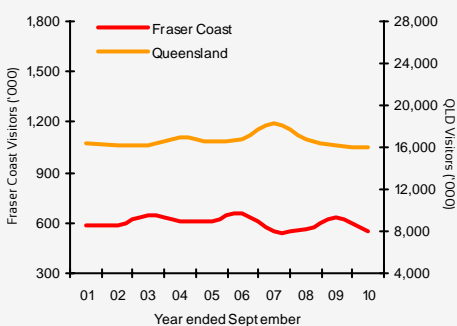


Year ended September 2010

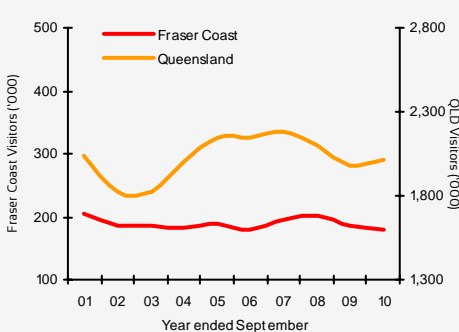


	Visitors	Holiday	VFR	Business
Domestic overnight	546,000	286,000	159,000	70,000
Annual change ¹	▼ -13%	▼ -12%	▼ -24%	▼ -13%
Trend change ²	0%	▼ -5%	▲ 2%	▲ 4%
International overnight	178,000	168,000	9,000	n/p
Annual change	▼ -4%	▼ -6%	▲ 50%	n/p
Trend change	▼ -3%	▼ -3%	▲ 10%	n/p
TOTAL	724,000	454,000	168,000	n/p
Annual change	▼ -11%	▼ -10%	▼ -22%	n/p

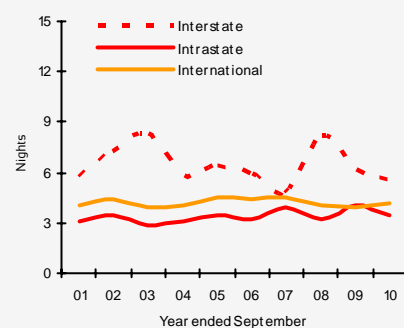
Domestic visitation



International visitation



Average length of stay (Fraser Coast)



■ The Fraser Coast performed well during the Global Financial Crisis as locals and those from neighbouring regions continued to travel to the region for a holiday, however this market has now softened, ultimately driving the regions decline over the last year.

■ In contrast to the state trend, Brisbane residents returned for a holiday, particularly families. This increase from Brisbane in contrast to the state trend, as the number of Brisbane residents travelling interstate over the year increased.

■ A large proportion of the Fraser Coasts' domestic holiday market increased their preference for caravan or camping accommodation over the year. In contrast, the number of holiday visitors staying in commercial accommodation weakened.

■ The Fraser Coast's largest international source markets, the United Kingdom (UK) and Germany softened over the last year driving the regions downturn overall.

■ The Fraser Coast, like many Queensland regions benefitted from the spike in visitation from the European youth market (under 30 years old) seen throughout the GFC. However, this market has now eased, a result of poor economic conditions in Europe and particularly the UK.

■ Positively, the region saw an increase from its fourth largest market, New Zealand (NZ), particularly those visiting friends or relatives.

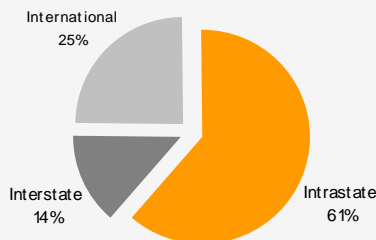
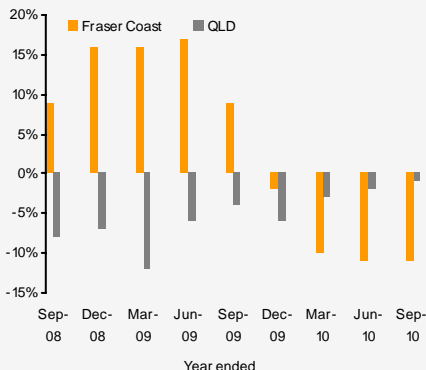
■ Interstate visitor length of stay dipped to average approximately 5 nights, however interstate visitors continue to stay longer than either intrastate or international visitors.

■ International holiday visitors to the Fraser Coast stayed an average of 3-4 nights in region and remained relatively stable over the year.

■ Intrastate length of stay increased throughout the GFC, supported by the increase in locals and residents of neighbouring regions increasing their holiday length of stay, however this has now eased.

Total visitation

Annual percentage change in visitation



■ There were **724,000** domestic and international overnight visitors to Fraser Coast in the year ended September 2010, this was a 11% 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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Domestic visitation Year ended September 2010

Domestic visitors to the Fraser Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	286,000	-12%	1,375,000	-21%	4.8	-0.6
VFR	159,000	-24%	517,000	-35%	3.3	-0.5
Business	70,000	-13%	131,000	-31%	1.9	-0.5
Total³	546,000	-13%	2,119,000	-24%	3.9	-0.5
Intrastate						
Holiday	225,000	-14%	1,026,000	-24%	4.6	-0.6
VFR	125,000	-31%	335,000	-44%	2.7	-0.6
Business	69,000	-13%	125,000	-33%	1.8	-0.5
Total	443,000	-16%	1,542,000	-29%	3.5	-0.6
Interstate						
Holiday	61,000	-3%	349,000	-10%	5.7	-0.4
VFR	34,000	17%	181,000	-9%	5.3	-1.5
Total	103,000	5%	578,000	-4%	5.6	-0.6

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Fraser Coast	616,000	-6%	n/p	n/p
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 of the Fraser Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	235,000	-24%	566,000	-58%
Brisbane	208,000	-7%	976,000	18%
NSW	56,000	-5%	298,000	4%

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

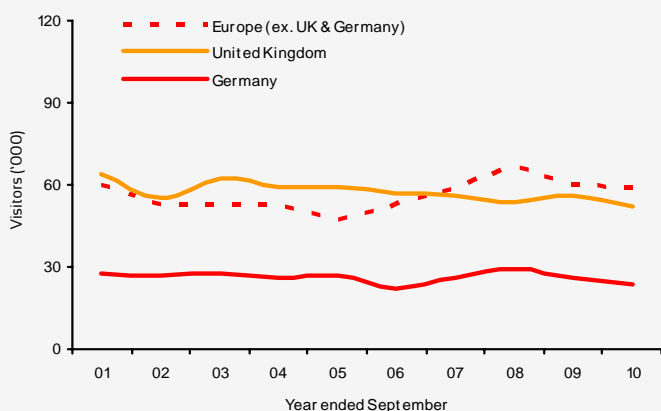
International visitors to the Fraser Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	168,000	-6%	591,000	-3%	3.5	0.1
VFR	9,000	50%	123,000	9%	14.4	-3.6
Total⁴	178,000	-4%	738,000	2%	4.2	0.3

Key international source markets of the Fraser Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	59,000	-2%	223,000	21%
United Kingdom	52,000	-7%	182,000	-22%
Germany	24,000	-8%	74,000	-12%
New Zealand	13,000	8%	74,000	48%

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



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

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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. This figure includes "Business" and "Other" visitors.

5. South East Queensland Country.

n/p not published.