

Year ended March 2011

IMPORTANT MESSAGE:

Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), **domestic tourism region** data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, **domestic** data for **tourism regions** will be presented as a 3 year average, with change over time shown as a 3 year trend change, not year on year change as in previous regional snapshots. Please note that the trend variances provided incorporate changes that occurred in tourism during the onset of the Global Financial Crisis and look at longer term trends rather than recent changes over the last year.

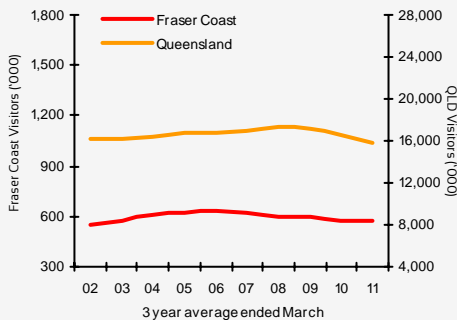
National and state level NVS data will be published as normal on a year ended basis.

Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.

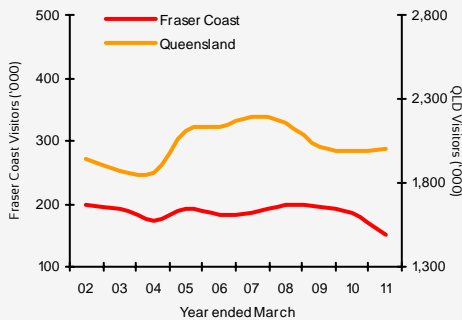


	Visitors	Holiday	VFR	Business
Domestic overnight 3 year average	572,000	281,000	186,000	81,000
Trend change ¹	▲ 1%	▼ -4%	▼ -3%	▲ 7%
International overnight	151,000	146,000	6,000	n/p
Annual change ²	▼ -19%	▼ -18%	▼ -25%	n/p
Trend change	▼ -8%	▼ -8%	▼ -8%	n/p

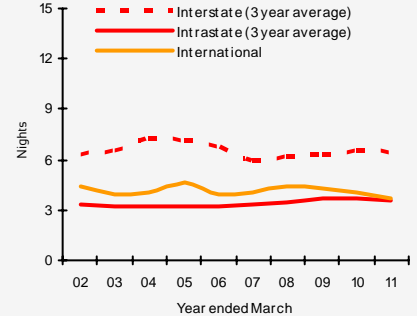
Domestic visitation



International visitation



Average length of stay (Fraser Coast)



- Over the three years ended March 2011, Fraser Coast recorded a slight increase in domestic visitors, driven by business visitors. Despite this, there was a decline in holiday and VFR (visiting friends and relatives).

- The Fraser Coasts' key intrastate holiday and VFR markets eased over the last three years in line with state trends. However, the number of intrastate holiday visitors caravanning or camping in the region increased over the three years to March 2011.

- Interstate holiday travel from interstate markets such as Sydney and Melbourne remains soft nationally, with the Fraser Coast seeing a symptomatic decline from these markets.

- The Fraser Coast saw declines in international visitation in the year ending March 2011, due in part to declines in youth visitors from the UK and Europe. This is a result of soft economic conditions in the UK & Europe, combined with accessibility issues as a result of adverse weather conditions which impacted Fraser Coast and Queensland during the 2010/2011 summer.

- While visitors from New Zealand increased, they could not offset declines from the key markets of UK & Europe.

- There was an increase in families travelling to the region for leisure.

- Reflecting the shift towards the shorter stay markets, the number of international visitors staying only a single night in the region increased during the period.

- The average length of stay for domestic visitors to the Fraser Coast declined over the three years ended March 2011, driven by a decline in VFR length of stay.

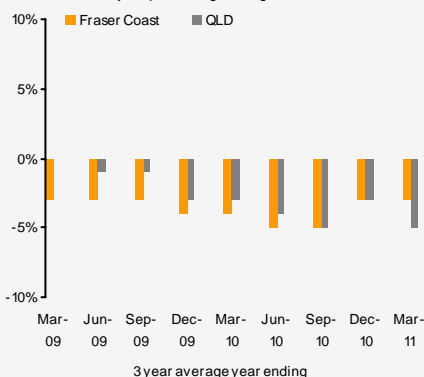
- While there were overall declines in interstate visitors' average length of stay, there were increases in NSW holiday visitors' length of stay on the Fraser Coast.

- The length of stay by intrastate holiday visitors to the Fraser Coast eased over the three years to March 2011 to an average of 4.5 nights, though remains above the state average of 3.3 nights.

- International visitors average length of stay declined in the year ending March 2011. This was due to leisure visitors shortening their stay in the region, in particular, family groups.

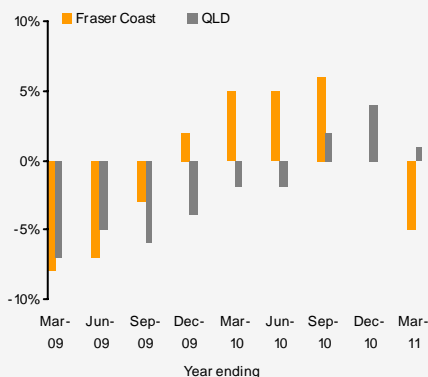
Domestic visitation

3 year percentage change in visitation



International visitation

Annual percentage change in visitation



Fraser Coast's domestic visitation has been following the general trend seen at the Queensland level.

Fraser Coast had been performing above the Queensland average until most recently, when declines were recorded. This is most likely attributable to severe weather events that affected Queensland in the 2010/2011 summer.

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Domestic visitation

Domestic visitors to the Fraser Coast 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	281,000	-4%	1,370,000	-7%	4.9	-0.2
VFR	186,000	-3%	712,000	-9%	3.8	-0.3
Business	81,000	7%	162,000	2%	2.0	-0.1
Total³	572,000	1%	2,326,000	-5%	4.1	-0.3
Intrastate						
Holiday	216,000	-1%	972,000	-6%	4.5	-0.3
VFR	153,000	-2%	479,000	0%	3.1	0.1
Business	80,000	10%	154,000	1%	1.9	-0.2
Total	467,000	4%	1,662,000	-2%	3.6	-0.2
Interstate						
Holiday	65,000	-12%	398,000	-9%	6.1	0.2
VFR	32,000	-9%	234,000	-23%	7.3	-1.3
Total	2,000	-33%	8,000	14%	4.0	1.7

Domestic day trip visitors year ended March 2011

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Fraser Coast ⁴	649,000	4%	n/p	n/p
Queensland	34,258,000	7%	\$3,627	7%
Australia	151,948,000	3%	\$14,950	-1%

Consumers remain budget conscious with global and domestic uncertainties continuing to subdue consumer confidence. As a result, domestic travellers are increasingly taking more affordable day trips, rather than overnight trips.

Key domestic source markets of the Fraser Coast 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Regional Qld	256,000	0%	900,000	-4%
Brisbane	212,000	8%	762,000	1%
Regional NSW	31,000	-18%	170,000	-11%

State comparison Domestic year ended March 2011

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,037,000	3%	67,025,000	-4%
NSW	23,505,000	4%	79,124,000	3%
Victoria	16,084,000	1%	49,663,000	-1%
Rest of Aus	14,251,000	1%	61,230,000	2%
Australia	67,605,000	2%	257,042,000	0%
Holiday visitors				
Queensland	6,914,000	-1%	33,885,000	-3%
NSW	10,203,000	-1%	38,833,000	2%
Victoria	7,504,000	0%	25,048,000	-1%
Rest of Aus	6,168,000	-2%	28,744,000	-1%
Australia	29,676,000	-1%	126,510,000	-1%

Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.



International visitation Year ended March 2011

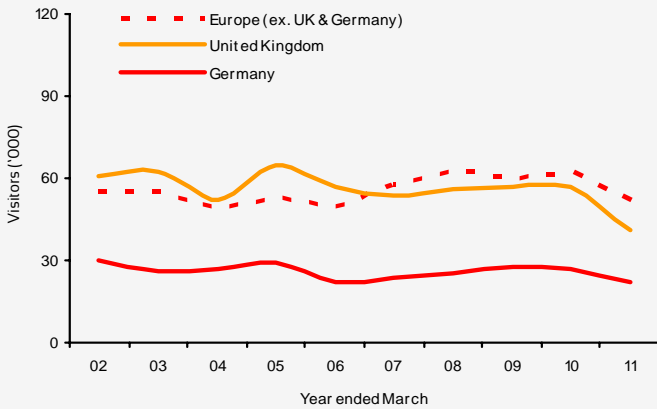
International visitors to the Fraser Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	146,000	-18%	479,000	-22%	3.3	-0.1
VFR	6,000	-25%	75,000	-40%	12.8	-3.4
Total³	151,000	-19%	565,000	-26%	3.7	-0.4

Key international source markets of the Fraser Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	52,000	-16%	163,000	-29%
United Kingdom	41,000	-28%	147,000	-32%
Germany	22,000	-19%	71,000	-15%
New Zealand	11,000	10%	60,000	-10%
USA	7,000	-22%	50,000	n/p

European, United Kingdom and German visitors to Fraser Coast YE March 02 - 11



State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,002,000	1%	39,474,000	-1%
NSW	2,829,000	3%	66,266,000	7%
Victoria	1,693,000	10%	40,628,000	2%
Rest of Aus	1,394,000	3%	40,232,000	3%
Australia ⁵	5,396,000	4%	186,600,000	3%
Holiday visitors				
Queensland	1,379,000	-3%	17,804,000	-8%
NSW	1,573,000	0%	20,642,000	-2%
Victoria	810,000	7%	7,910,000	-2%
Rest of Aus	755,000	1%	11,414,000	-7%
Australia ⁵	2,866,000	1%	57,770,000	-5%

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

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Regional visitation

Domestic Regional Comparison (3 year average to March 2011)

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,538,000	-1%	14,155,000	-1%	3.1	0.0	29%	38%	26%	28%
Gold Coast	3,243,000	-3%	13,437,000	-7%	4.1	-0.2	61%	27%	9%	20%
Sunshine Coast	2,615,000	-5%	10,560,000	-6%	4.0	-0.1	61%	29%	7%	16%
TNQ	1,384,000	-7%	7,393,000	-4%	5.3	0.2	55%	24%	17%	9%
Toowoomba	1,186,000	-5%	3,526,000	-1%	3.0	0.1	31%	41%	21%	7%
Townsville	783,000	-12%	3,011,000	-9%	3.8	0.1	33%	28%	29%	5%
Capricorn	776,000	-9%	2,847,000	-4%	3.7	0.2	33%	28%	31%	5%
Mackay	588,000	-10%	2,388,000	-9%	4.1	0.1	27%	28%	40%	4%
Fraser Coast	572,000	1%	2,326,000	-5%	4.1	-0.3	49%	33%	14%	4%
Bundaberg	513,000	-5%	1,819,000	-7%	3.5	-0.1	35%	37%	19%	3%
Whitsundays	458,000	-3%	1,973,000	1%	4.3	0.2	69%	16%	12%	3%
Outback	361,000	-10%	1,867,000	-6%	5.2	0.2	37%	19%	37%	2%
Gladstone	312,000	-4%	1,323,000	10%	4.2	0.6	46%	30%	20%	2%
Western Downs	301,000	-22%	878,000	-19%	2.9	0.1	43%	26%	24%	2%
Southern Downs	247,000	0%	586,000	-4%	2.4	-0.1	52%	31%	13%	2%
Total	15,876,000	-5%	68,430,000	-5%	4.3	0.0	44%	32%	20%	-

Please note the total for all regions uses 3 year average visitation data and trend % change to provide a meaningful point of comparison with the regional data presented. The total figures above will differ to those in the State Comparison on page 2 of this snapshot, which use year end March 2011 visitation data and year on year % change.

International Regional Comparison (Year ended March 2011)

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	926,000	1%	17,018,000	6%	18.4	0.9	49%	30%	13%	46%
Gold Coast	783,000	-6%	7,799,000	-5%	10.0	0.1	77%	16%	5%	39%
TNQ	661,000	0%	5,830,000	-7%	8.8	-0.7	91%	5%	3%	33%
Sunshine Coast	271,000	-3%	2,646,000	4%	9.8	0.7	78%	18%	3%	14%
Whitsundays	191,000	-14%	1,086,000	-15%	5.7	-0.1	96%	3%	1%	10%
Fraser Coast	151,000	-19%	565,000	-26%	3.7	-0.4	97%	4%	0%	8%
Townsville	124,000	-14%	1,361,000	-2%	11.0	1.4	78%	13%	5%	6%
Capricorn	72,000	-11%	499,000	-42%	7.0	-3.6	81%	11%	4%	4%
Gladstone	57,000	-11%	243,000	-47%	4.3	-2.9	88%	7%	5%	3%
Mackay	46,000	-16%	350,000	-20%	7.6	-0.4	76%	17%	7%	2%
Bundaberg	40,000	-13%	746,000	18%	18.6	5.0	78%	15%	0%	2%
Toowoomba	36,000	-8%	703,000	3%	19.6	2.1	44%	33%	14%	2%
Outback	24,000	-11%	253,000	-26%	10.5	-2.2	75%	13%	8%	1%
Western Downs	12,000	0%	167,000	8%	14.1	1.3	58%	17%	8%	1%
Southern Dns	10,000	25%	205,000	24%	20.0	0.6	70%	30%	0%	0%
Total	2,002,000	1%	39,474,000	-1%	19.7	-0.5	69%	25%	9%	-

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

1. Trend change refers to the percentage change between the 3 years average ended March 2010 vs. the 3 years average ended March 2011.

2. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.

3. This figure includes "Other" visitors.

4. 3 year average ended March 2011.

5. Excludes Transit visitors who did not have a stopover place.

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.