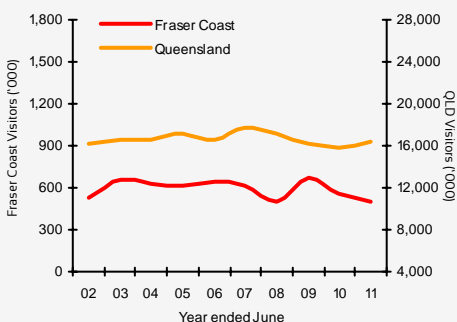


Year ended June 2011

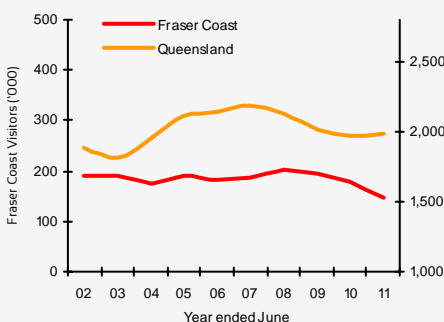


	Visitors	Holiday	VFR	Business
<b>Domestic overnight</b>	495,000	237,000	150,000	74,000
Annual change <sup>1</sup>	▼ -10%	▼ -19%	▼ -6%	▼ -9%
Trend change <sup>2</sup>	● 0%	▼ -2%	▼ -7%	▲ 11%
<b>International overnight</b>	148,000	140,000	7,000	n/p
Annual change	▼ -17%	▼ -18%	▼ -22%	n/p
Trend change	▼ -9%	▼ -9%	▼ -4%	n/p
<b>TOTAL</b>	<b>643,000</b>	<b>377,000</b>	<b>157,000</b>	<b>n/p</b>
Annual change	▼ -12%	▼ -19%	▼ -7%	n/p

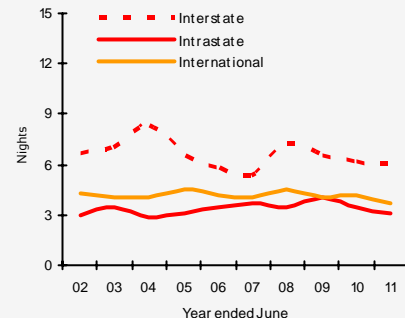
### Domestic visitation



### International visitation



### Average length of stay (Fraser Coast)



Fraser Coast recorded growth in Brisbane residents travelling to the region, driven by business. A moderate increase in adult couples travelling to the region together was also achieved.

Despite this, Fraser Coast had an overall decline in domestic visitation in the year ending June 2011. This was the result of fewer intrastate family and friends travelling together to the region. This was associated with reduced accessibility as a result of the 2010/2011 QLD floods.

Similarly, the reduced accessibility saw the number of visitors driving to the Fraser Coast decline by 11%, while those flying to the region increased by 11%.

The Fraser Coast saw a decline in international visitation in the year ending June 2011. While there were increases in older visitors (60 years and over) and family groups to the region, this could not offset declines in the youth market, a trend also seen at the state and national level.

The youth (15 to 29 years) market accounted for 67% of all international visitors to Fraser Coast in the year ending June 2010. This fell to 62% in the year ending June 2011.

The declines are mostly associated with a reliance on the United Kingdom (UK) youth market. This market has been weak due to soft economic conditions in the UK which has seen high youth unemployment, combined with a strong Australian dollar.

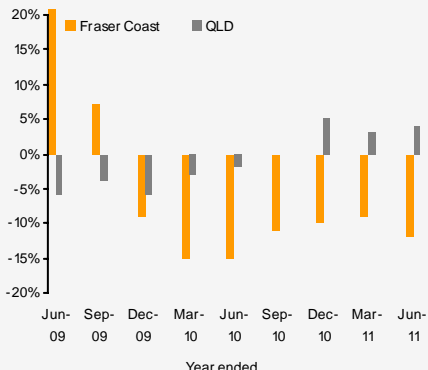
International visitors average stay declined in the year ending June 2011. This was the result of VFR visitors reducing their average stay in the region by almost 5 nights.

Domestic overnight visitors also reduced their average length of stay in the Fraser Coast. In particular, adult couples travelling together reduced their average stay by 1.6 nights to an average of 3.7 nights. This was significant in terms of total nights as the adult couple market is a key market for Fraser Coast.

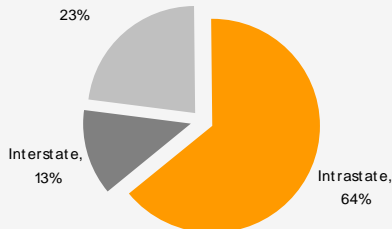
International visitors stay for just 3.7 nights on average in the Fraser Coast. Similarly, intrastate visitors stay for an average of 3.1 nights, while interstate visitors stay far longer, averaging 6.1 nights in the region.

### Total visitation

Annual percentage change in visitation



### International, 23%



There were **643,000** domestic and international overnight visitors to Fraser Coast in the year ended June 2011, this was a 12% decline on the year ended June 2010.

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## Domestic visitation Year ended June 2011

### Domestic visitors to the Fraser Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	237,000	-19%	1,037,000	-27%	4.4	-0.5
VFR	150,000	-6%	496,000	-8%	3.3	-0.1
Business	74,000	-9%	116,000	-18%	1.6	-0.1
<b>Total<sup>3</sup></b>	<b>495,000</b>	<b>-10%</b>	<b>1,775,000</b>	<b>-18%</b>	<b>3.6</b>	<b>-0.3</b>
<b>Intrastate</b>						
Holiday	186,000	-24%	671,000	-39%	3.6	-0.9
VFR	123,000	-3%	376,000	7%	3.1	0.3
Business	68,000	-15%	95,000	-31%	1.4	-0.3
Total	409,000	-12%	1,251,000	-23%	3.1	-0.4
<b>Interstate</b>						
Holiday	51,000	6%	366,000	12%	7.2	0.4
VFR	27,000	-13%	120,000	-35%	4.4	-1.5
Total	86,000	-2%	524,000	-3%	6.1	-0.1

### Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Fraser Coast	580,000	-1%	\$110	26%
Queensland	33,684,000	1%	\$3,408	-5%
Australia	151,915,000	1%	\$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 of the Fraser Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	230,000	16%	642,000	-29%
Regional Qld	179,000	-32%	609,000	-15%
NSW	41,000	-11%	218,000	-15%

### 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%
<b>Holiday visitors</b>				
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.

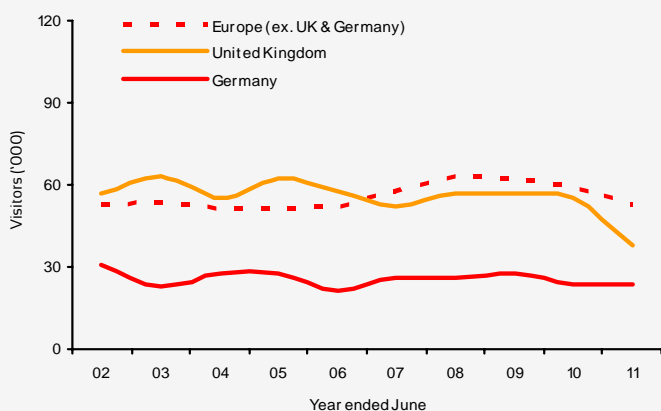


## International visitation Year ended June 2011

### International visitors to the Fraser Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	140,000	-18%	438,000	-27%	3.1	-0.4
VFR	7,000	-22%	76,000	-44%	11.0	-4.7
<b>Total<sup>4</sup></b>	<b>148,000</b>	<b>-17%</b>	<b>543,000</b>	<b>-28%</b>	<b>3.7</b>	<b>-0.5</b>

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



### Key international source markets of the Fraser Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	53,000	-10%	168,000	-23%
United Kingdom	38,000	-31%	148,000	-23%
Germany	24,000	0%	74,000	-1%
Scandinavia	11,000	-15%	33,000	-33%
New Zealand	10,000	-17%	75,000	-7%

### 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](http://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](mailto: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 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%
<b>Fraser Coast</b>	<b>495,000</b>	<b>-10%</b>	<b>1,775,000</b>	<b>-18%</b>	<b>3.6</b>	<b>-0.3</b>	<b>48%</b>	<b>30%</b>	<b>15%</b>	<b>3%</b>
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%
<b>Total</b>	<b>16,429,000</b>	<b>4%</b>	<b>68,489,000</b>	<b>-3%</b>	<b>4.2</b>	<b>-0.3</b>	<b>42%</b>	<b>32%</b>	<b>21%</b>	<b>-</b>

## 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%
<b>Fraser Coast</b>	<b>148,000</b>	<b>-17%</b>	<b>543,000</b>	<b>-28%</b>	<b>3.7</b>	<b>-0.5</b>	<b>95%</b>	<b>5%</b>	<b>0%</b>	<b>7%</b>
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%
<b>Total</b>	<b>1,989,000</b>	<b>1%</b>	<b>39,644,000</b>	<b>2%</b>	<b>19.9</b>	<b>0.1</b>	<b>68%</b>	<b>25%</b>	<b>10%</b>	<b>-</b>

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.

4. This figure includes "Business" and "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.