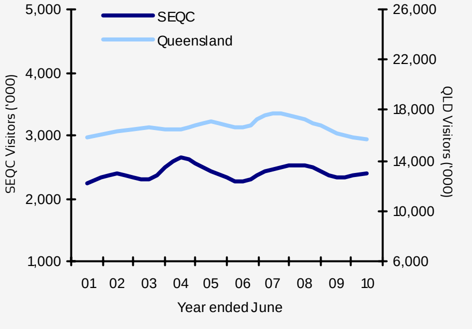
SEQ Country Regional Snapshot

Year ended June 2010

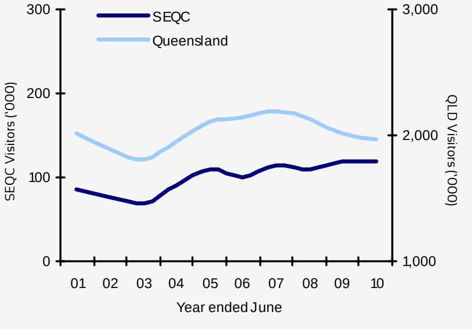
	Visitors	Holiday	VFR	Business
Domestic overnight	2,408,000	924,000	1,069,000	317,000
Annual change[1]	▲ 3%	▲ 5%	▲ 2%	▲ 16%
Trend change[2]	▼ -1%	▲ 2%	▲ 1%	▼ -5%
International overnight	118,000	49,000	59,000	7,000
Annual change	0%	▲ 4%	▼ -2%	▲ 17%
Trend change	▲ 1%	▲ 2%	▲ 1%	▼ -9%
TOTAL	2,526,000	973,000	1,128,000	324,000
Annual change	▲ 3%	▲ 5%	▲ 1%	▲ 16%

Domestic visitation



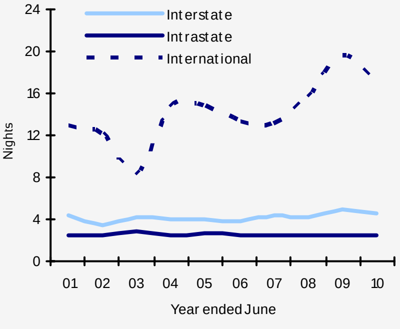
- Over the last year, SEQC has continued to enjoy stronger results from the domestic holiday market than Queensland overall; and has more recently seen a recovery from the important intrastate VFR (visiting friends or relatives) market.
- Brisbane residents were again responsible for bolstering SEQC's holiday market, as in previous quarters, with affordable short breaks of 2 nights the preferred trip. Intrastate holiday visitors to SEQC were considerably more likely to have used a caravan or camped than intrastate holiday visitors to Qld generally.
- As with the intrastate holiday market, it was residents of the state capital that stimulated a recovery in VFR travel to SEQC.

International visitation



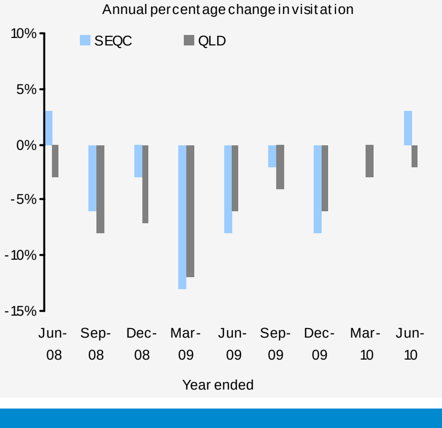
- Similar to domestic travel to SEQC, the most common reason for international visitors making a stopover in the region is VFR. The international VFR market eased for SEQC over the last year, in line with state trends.
- Holiday visitation countered the small declines from the VFR market, with improvements over the last year in holiday visitors from NZ and Europe. Growth from the youth market has begun to soften for Queensland, though SEQC again saw growth from this market.
- The working holiday sector, a significant contributor of visitor nights to SEQC, has started to decline, with working holiday visa applications to Australia declining over recent quarters.

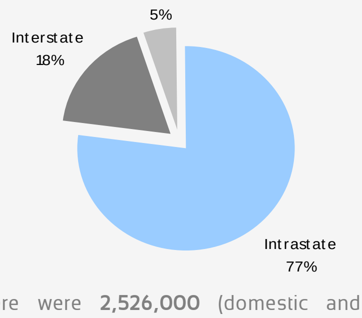
Average length of stay (SEQC)



- SEQC remains a short break destination for visitors from Queensland, irrespective of their reason for visiting.
- Interstate visitors typically have a more extended length of stay, with holiday visitors averaging 3-4 nights in the region and those visiting for VFR spending 5 nights in the region.
- Working holiday visitors have boosted the overall average length of stay of international visitors to SEQC in recent years, however this market has now softened.
- International visitors to SEQC visiting for holiday/pleasure typically stay 6 nights, while working holiday visitors stay for an average of 2 months.

Total visitation





- There were **2,526,000** (domestic and international) overnight visitors to SEQC in the year ended June 2010, this was an increase of 3% on the year ended June 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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statsonq@tq.com.au

SEQ Country Regional Snapshot

Domestic visitation Year ended June 2010

Domestic visitors to SEQC

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	924,000	5%	2,326,000	3%	2.5	-0.1
VFR	1,069,000	2%	3,318,000	-1%	3.1	-0.1
Business	317,000	16%	829,000	17%	2.6	0.0
Total[3]	2,408,000	3%	6,789,000	1%	2.8	-0.1
Intrastate						
Holiday	796,000	11%	1,858,000	11%	2.3	0.0
VFR	829,000	-1%	2,068,000	0%	2.5	0.0
Business	265,000	20%	630,000	25%	2.4	0.1
Total	1,956,000	4%	4,762,000	5%	2.4	0.0
Interstate						
Holiday	129,000	-19%	468,000	-21%	3.6	-0.1
VFR	240,000	13%	1,250,000	-4%	5.2	-0.9
Business	51,000	-2%	198,000	-3%	3.9	-0.1
Total	452,000	2%	2,027,000	-6%	4.5	-0.4

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
SEQC	6,936,000	-2%	n/p	n/p
Queensland	33,512,000	7%	$3,604	14%
Australia	150,963,000	7%	$15,518	7%

The growing trend towards day trips continued, with the comparative affordability of this form of travel a key influence.

Key domestic source markets to SEQC

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	988,000	-3%	2,626,000	3%
Brisbane	968,000	11%	2,136,000	7%
Regional NSW	212,000	16%	740,000	10%
Sydney	90,000	-14%	388,000	-27%
VIC	79,000	-5%	409,000	-17%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,726,000	-2%	70,814,000	5%
NSW	22,896,000	2%	76,966,000	-1%
Victoria	15,942,000	0%	50,255,000	2%
Rest of Aus	14,151,000	-4%	60,694,000	-4%
Australia	66,404,000	-1%	258,729,000	0%
Holiday visitors				
Queensland	7,017,000	-4%	34,643,000	0%
NSW	10,465,000	4%	38,523,000	-2%
Victoria	7,500,000	1%	25,058,000	2%
Rest of Aus	6,332,000	-1%	29,114,000	-1%
Australia	30,252,000	1%	127,338,000	-1%

The 'travel close to home' trend that buoyed Queensland's domestic results from mid 2009 has eased, with the number of Queenslanders taking an interstate trip gaining momentum. This increase in interstate travel has resulted in weaker domestic results for Queensland over the year.

SEQ Country Regional Snapshot

Tourism Queensland

International visitation Year ended June 2010

International visitors to SEQC

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	49,000	4%	687,000	-13%	13.9	-3.1
VFR	59,000	-2%	857,000	0%	14.6	0.3
Business	7,000	n/p	72,000	n/p	10.5	2.0
Total[3]	118,000	0%	1,975,000	-15%	16.8	-2.8

New Zealand, United Kingdom and American visitors to SEQC
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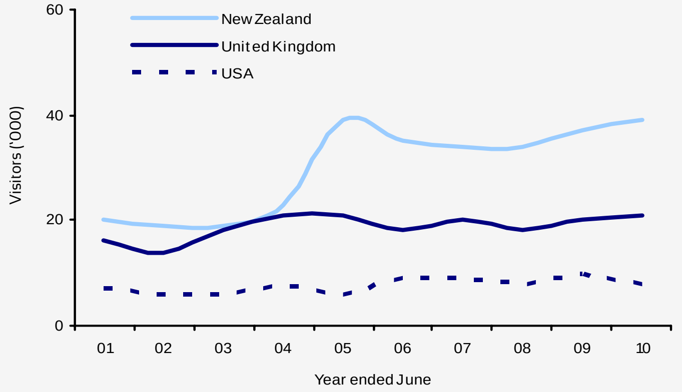

Key international source markets to SEQC

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	39,000	5%	299,000	-24%
United Kingdom	21,000	5%	319,000	1%
United States	8,000	n/p	95,000	n/p
Holiday visitors				
United Kingdom	11,000	n/p	69,000	n/p
New Zealand	11,000	n/p	31,000	n/p

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,970,000	-2%	39,011,000	-2%
NSW	2,782,000	3%	63,241,000	4%
Victoria	1,548,000	5%	40,950,000	14%
Rest of Aus	1,348,000	0%	38,937,000	4%
Australia	5,232,000	3%	182,139,000	5%
Holiday visitors				
Queensland	1,415,000	-3%	18,643,000	-4%
NSW	1,569,000	3%	21,311,000	10%
Victoria	752,000	1%	8,497,000	9%
Rest of Aus	735,000	-3%	12,025,000	0%
Australia	2,826,000	1%	60,475,000	3%

Economic recovery is continuing across the globe although the effects of the GFC linger for many countries. Competitive airfares from most of Australia's major source markets, offset much of the hangover from the GFC in stimulating travel to Australia. Combined with an expansion in air capacity on some routes has further supported international visitation to Australia.

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 SEQC tourism region covers the hinterland and regional areas of the Gold Coast, Brisbane, Darling Downs, Sunshine Coast and Hervey Bay regions.

SEQ Country Regional Snapshot

Tourism Queensland

Year ended June 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,260,000	-8%	13,639,000	-7%	3.2	0.0	27%	40%	26%	27%
Gold Coast	3,270,000	3%	13,898,000	4%	4.2	0.0	64%	26%	8%	21%
Sunshine Coast	2,439,000	-6%	10,602,000	3%	4.3	0.3	61%	32%	5%	16%
SEQC[4]	**2,408,000**	**3%**	**6,789,000**	**1%**	**2.8**	**-0.1**	**38%**	**44%**	**13%**	**15%**
TNQ	1,412,000	-7%	7,751,000	7%	5.5	0.7	55%	27%	16%	9%
Central Queensland	1,128,000	13%	4,496,000	28%	4.0	0.5	37%	30%	26%	7%
Toowoomba	1,047,000	6%	3,373,000	22%	3.2	0.4	32%	41%	20%	7%
Capricorn	832,000	12%	3,582,000	48%	4.3	1.0	37%	25%	29%	5%
Townsville	787,000	-8%	3,332,000	13%	4.2	0.8	31%	26%	30%	5%
Fraser Coast	752,000	-11%	2,673,000	-26%	3.6	-0.6	47%	33%	14%	5%
Mackay	597,000	3%	2,367,000	-12%	4.0	-0.7	24%	24%	46%	4%
Bundaberg	524,000	8%	1,959,000	11%	3.7	0.1	32%	39%	15%	3%
Whitsundays	463,000	14%	2,131,000	25%	4.6	0.4	68%	15%	12%	3%
Outback	364,000	n/p	2,070,000	n/p	5.7	1.1	32%	17%	43%	2%
Southern Downs	338,000	n/p	715,000	n/p	2.1	-0.5	50%	33%	16%	2%
Gladstone	334,000	27%	1,326,000	37%	4.0	0.3	39%	40%	16%	2%
Western Downs	293,000	n/p	844,000	n/p	2.9	-0.2	33%	31%	28%	2%
Total	15,726,000	-2%	70,814,000	5%	4.5	0.3	45%	33%	19%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	901,000	-2%	15,814,000	-2%	17.5	0.0	54%	29%	12%	46%
Gold Coast	826,000	5%	8,054,000	4%	9.8	0.0	79%	15%	4%	42%
TNQ	654,000	-7%	6,091,000	-7%	9.3	-0.1	91%	4%	2%	33%
Sunshine Coast	280,000	1%	2,496,000	7%	8.9	0.5	80%	18%	2%	14%
Whitsundays	213,000	-2%	1,153,000	-15%	5.4	-0.8	97%	2%	1%	11%
Fraser Coast	181,000	-8%	797,000	-7%	4.4	0.1	94%	6%	1%	9%
Townsville	138,000	-6%	1,421,000	7%	10.3	1.3	80%	13%	4%	7%
Central Queensland	125,000	-1%	1,111,000	4%	8.9	0.5	86%	10%	4%	6%
SEQC[4]	**118,000**	**0%**	**1,975,000**	**-15%**	**16.8**	**-2.8**	**42%**	**50%**	**6%**	**6%**
Capricorn	77,000	-8%	690,000	4%	8.9	1.0	86%	10%	4%	4%
Gladstone	64,000	14%	421,000	4%	6.6	-0.6	89%	6%	3%	3%
Mackay	52,000	-5%	409,000	1%	7.9	0.6	77%	21%	4%	3%
Bundaberg	42,000	-14%	646,000	0%	15.3	2.2	83%	14%	0%	2%
Toowoomba	33,000	-11%	613,000	4%	18.4	2.3	48%	33%	9%	2%
Outback	25,000	n/p	302,000	n/p	11.8	-3.1	88%	8%	4%	1%
Western Downs	10,000	n/p	151,000	n/p	15.2	n/p	70%	20%	10%	1%
Southern Downs	9,000	n/p	104,000	n/p	11.5	n/p	78%	22%	0%	0%
Total	1,970,000	-2%	39,011,000	-2%	19.8	0.0	72%	24%	8%	-

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 2009.
2. Trend change refers to the percentage change between the 3 years to June 2009 vs. the 3 years to June 2010.
3. This figure includes "Other" visitors.
4. South East Queensland Country.

n/p not published.