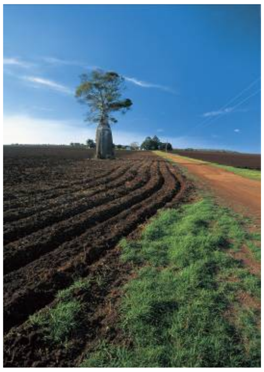
South East Queensland Country Regional Snapshot

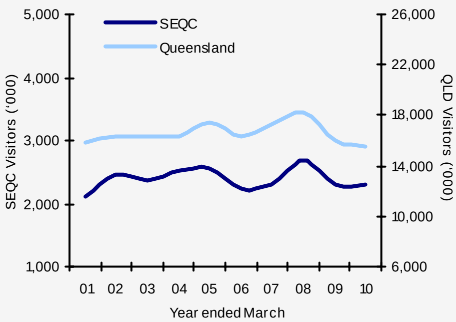
Year ended March 2010

www.tq.com.au/research

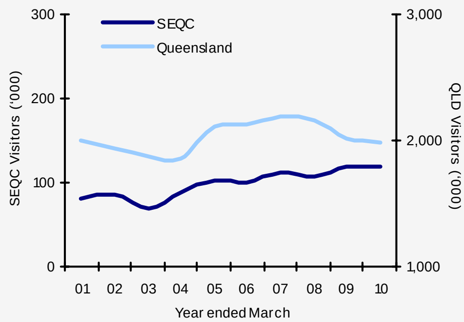


	Visitors	Holiday	VFR	Business
Domestic overnight	2,309,000	902,000	966,000	357,000
Annual change[1]	0%	▲ 10%	▼ -13%	▲ 27%
Trend change[2]	0%	▲ 4%	▼ -1%	▲ 3%
International overnight	118,000	49,000	59,000	6,000
Annual change	▼ -1%	▲ 2%	▼ -5%	▲ 20%
Trend change	▲ 1%	▲ 4%	▲ 1%	▼ -14%
TOTAL	2,427,000	951,000	1,025,000	363,000
Annual change	0%	▲ 10%	▼ -12%	▲ 26%

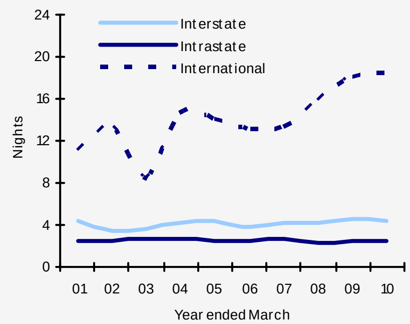
Domestic visitation



International visitation



Average length of stay (SEQC)



▪ South East Queensland Country (SEQC) stable domestic result was driven by the ongoing recovery in holiday visitation, however this was countered by the weaker VFR (visiting friends or relatives) market.

▪ It was from Brisbane residents travelling to the region for a holiday, together with visitors from local and neighbouring regions that supported the holiday growth. The pattern of domestic travel towards short break trips continued to bode well for SEQC due to its proximity to the states capital.

▪ Travel for VFR remains an important market for SEQC, however the region saw a contraction in both interstate and intrastate visitation.

▪ The holiday result was complimented by a strong recovery from the business market. Perhaps due to a return to business confidence within the resources sector.

▪ SEQC, as with Queensland, saw a marginal decline in international visitation over the last year. In a pattern similar to the domestic market, it was the ongoing recovery in holiday visitation that off-set the decline in the VFR market.

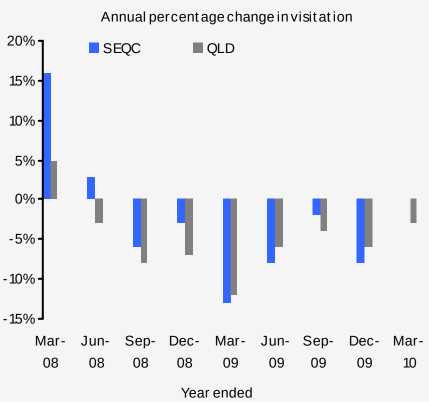
▪ The SEQC region did not see an increase in New Zealand VFR visitors over the year due to the record seen in the previous year (as the pattern of travel throughout the GFC saw an increase in VFR visitation). Therefore the decline from this market represented a return to more stable visitation levels.

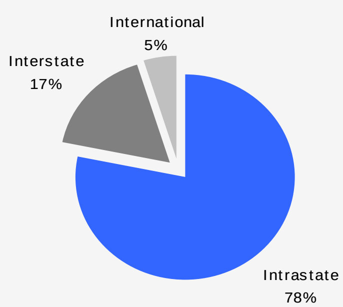
▪ Holiday visitors from the United Kingdom (UK) and Continental Europe increased, driven by the youth visitors (under 30 years old) a trend seen across the state. The youth visitors represented more than half of all European holiday visitors to SEQC.

▪ International length of stay remained relatively stable over the year. Working holiday visitors decreased their length of stay, and this was countered by holiday and VFR visitors staying longer.

▪ Already being a short break destination for domestic visitors, the length of stay remained stable at 2-3 nights for intrastate visitors over the year. Similarly, interstate length of stay remained within the 4-5 night range.

Total visitation





▪ There were **2,427,000** (domestic and international) overnight visitors to SEQC in the year ended March 2010, this remained steady 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.

Stats on Q are you subscribed?

To receive an email alert whenever new tourism figures are released email 'subscribe' to:

statsonq@tq.com.au

South East Queensland Country Regional Snapshot

Domestic visitation Year ended March 2010

www.tq.com.au/research

Domestic visitors to SEQC

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	902,000	10%	2,296,000	5%	2.5	-0.2
VFR	966,000	-13%	2,975,000	-16%	3.1	-0.1
Business	357,000	27%	816,000	1%	2.3	-0.6
Total[3]	2,309,000	0%	6,379,000	-7%	2.8	-0.2
Intrastate						
Holiday	784,000	20%	1,881,000	22%	2.4	0.0
VFR	750,000	-14%	1,838,000	-18%	2.4	-0.2
Business	322,000	43%	736,000	26%	2.3	-0.3
Total	1,917,000	5%	4,642,000	0%	2.4	-0.1
Interstate						
Holiday	118,000	-30%	416,000	-36%	3.5	-0.4
VFR	216,000	-9%	1,137,000	-12%	5.3	-0.1
Business	35,000	-40%	80,000	n/p	2.3	-1.5
Total	393,000	-19%	1,737,000	-21%	4.4	-0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
SEQC	6,876,000	7%	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.

Key domestic source markets to SEQC

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	969,000	-5%	2,481,000	-10%
Brisbane	948,000	17%	2,162,000	15%
Regional NSW	175,000	-10%	546,000	-21%
Sydney	88,000	-21%	376,000	-27%
VIC	62,000	-44%	330,000	-39%

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.

South East Queensland Country Regional Snapshot

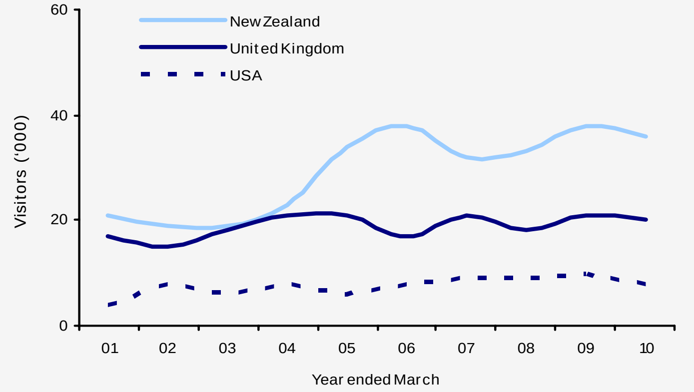
International visitation Year ended March 2010

www.tq.com.au/research

International visitors to SEQC

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	49,000	2%	811,000	23%	16.7	3.0
VFR	59,000	-5%	900,000	4%	15.3	1.5
Business	6,000	20%	57,000	36%	9.0	-0.1
Total[3]	118,000	-1%	2,181,000	1%	18.5	0.4

New Zealand, United Kingdom and American visitors to SEQC YE March 01 - 10



Key international source markets to SEQC

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	36,000	-5%	296,000	-21%
United Kingdom	20,000	-5%	287,000	-13%
United States	8,000	-20%	103,000	14%
Holiday visitors				
United Kingdom	10,000	43%	69,000	15%
New Zealand	8,000	-11%	24,000	n/p

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

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[4]	**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. South East Queensland Country.

n/p – not published.