

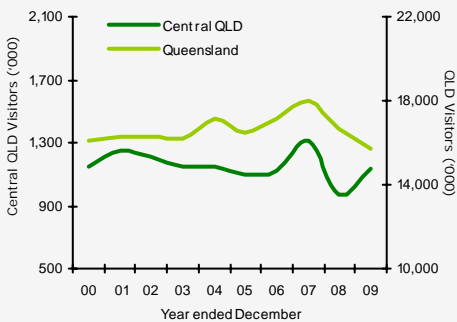
# Central Queensland Regional Snapshot

Year ended December 2009

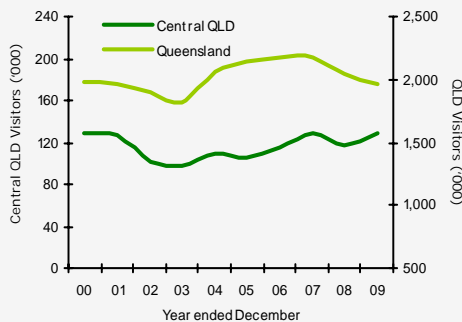


	Visitors	Holiday	VFR	Business
<b>Domestic overnight</b>	1,130,000	445,000	325,000	256,000
Annual change <sup>1</sup>	▲ 17%	▲ 27%	▲ 16%	▼ -11%
Trend change <sup>2</sup>	0%	▲ 1%	▼ -2%	▼ -1%
<b>International overnight</b>	128,000	109,000	12,000	n/p
Annual change	▲ 9%	▲ 7%	▲ 33%	n/p
Trend change	▲ 3%	▲ 4%	▲ 6%	n/p
<b>TOTAL</b>	1,258,000	554,000	337,000	n/p
<b>Annual change</b>	▲ 16%	▲ 22%	▲ 16%	n/p

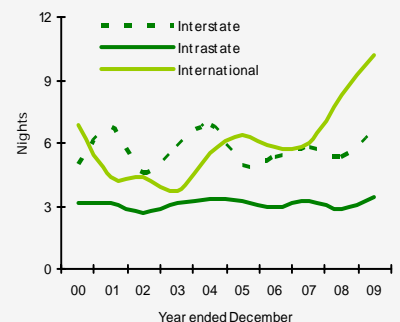
## Domestic visitation



## International visitation



## Average length of stay (Central QLD)



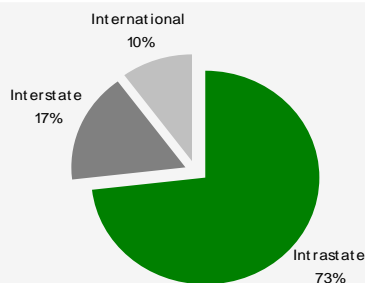
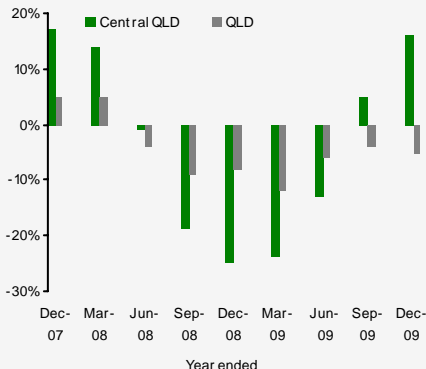
- Unlike the state, domestic visitors to Central Queensland (CQ) increased over the year ending December 2009.
- This was driven by an increase in holiday visitors to CQ, and more specifically intrastate holiday visitors.
- Much of this growth came from local and neighbouring regions, with the trend towards travel close to home continuing in CQ.
- The family market remains resilient, increasing their travel to CQ and particularly those from within Queensland on a holiday.
- The majority of domestic visitors to CQ stayed in affordable forms of accommodation such as friends or relatives or in hotels/motels less than 4 stars.

- Going against the state trend, Central Queensland (CQ) saw an increase in international visitors over the year to December 2009.
- Visitation from CQ's largest international source market, the United Kingdom (UK), increased by 7% in 2009, driven by the youth market (under 30).
- The youth market also remained stronger for visitors from Continental Europe to the CQ region.
- While youth travel continued to grow, CQ saw a decline in visitation from its largest source of visitors from Continental Europe, Germany. This trend was also seen across the majority of Queensland regions in the year ended December 2009.

- Domestic visitors' average length of stay in Central Queensland (CQ) increased by 0.7 nights to 3.9 nights in 2009, driven by interstate and intrastate holiday visitors staying longer.
- International visitors' average length of stay also increased in 2009, with working holiday, employment and education the main drivers behind this upturn.
- International visitors from the United Kingdom and Germany stayed in the region longer (up 1.3 and 4.1 nights, respectively) in the year ended December 2009.

## Total visitation

Annual percentage change in visitation



- There were **1,258,000** total overnight visitors to Central Queensland in the year ended December 2009, this was a 16% increase on the year ended December 2008.

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 visitors to Central Queensland

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	445,000	27%	1,859,000	n/p	4.2	0.9
VFR	325,000	16%	1,263,000	16%	3.9	0.0
Business	256,000	-11%	889,000	27%	3.5	1.1
<b>Total</b>	<b>1,130,000</b>	<b>17%</b>	<b>4,456,000</b>	<b>42%</b>	<b>3.9</b>	<b>0.7</b>
<b>Intrastate</b>						
Holiday	361,000	22%	1,262,000	n/p	3.5	0.8
VFR	267,000	6%	933,000	3%	3.5	-0.1
Business	212,000	-16%	534,000	-9%	2.5	0.2
Total	919,000	10%	3,081,000	26%	3.4	0.5
<b>Interstate</b>						
Holiday	84,000	n/p	598,000	n/p	7.1	0.8
Total	211,000	n/p	1,375,000	n/p	6.5	1.2

### Key domestic source markets to Central Queensland

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	683,000	3%	2,125,000	17%
Brisbane	236,000	37%	956,000	52%
NSW	140,000	n/p	742,000	n/p

### State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,729,000	-6%	69,779,000	-3%
NSW	22,623,000	-6%	76,991,000	-6%
Victoria	15,741,000	-6%	49,451,000	-5%
Rest of Aus	14,256,000	-8%	60,459,000	-8%
Australia	66,077,000	-6%	256,680,000	-6%
<b>Holiday visitors</b>				
Queensland	7,369,000	-3%	36,490,000	1%
NSW	10,126,000	-4%	39,052,000	-3%
Victoria	7,368,000	-8%	24,641,000	-8%
Rest of Aus	6,202,000	-7%	28,879,000	-7%
Australia	29,945,000	-6%	129,062,000	-4%

QLD's overall change in visitation was on par with that seen nationally, however QLD's stability in intrastate holiday visitors, and growth in intrastate holiday nights was not seen in other states.

### Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Central QLD	1,787,000	28%	n/p	n/p
Queensland	31,575,000	11%	\$3,216	2%
Australia	144,393,000	6%	\$14,683	2%

Nationally, and in QLD the popularity of day trips continued to grow in 2009, with the comparative affordability of this form of travel a key influence.



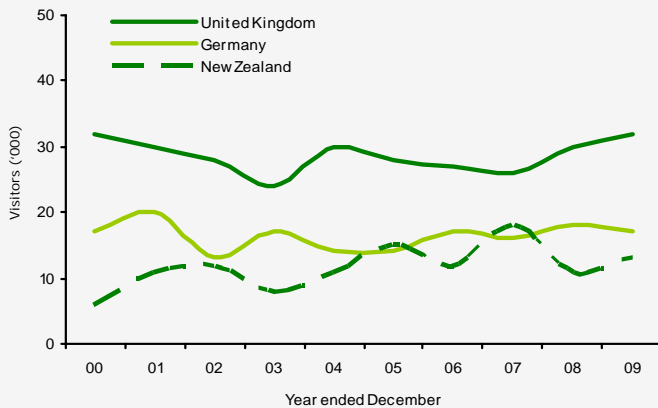
### International visitors to Central Queensland

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	109,000	7%	599,000	28%	5.5	0.9
VFR	12,000	33%	270,000	53%	22.3	1.6
<b>Total</b>	<b>128,000</b>	<b>9%</b>	<b>1,304,000</b>	<b>35%</b>	<b>10.2</b>	<b>1.9</b>

### Key international source markets to Central Queensland

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	32,000	7%	147,000	52%
Germany	17,000	-6%	109,000	n/p
New Zealand	13,000	18%	120,000	36%
United States	10,000	43%	73,000	28%

### United Kingdom, German and New Zealand visitors to Central Queensland YE December 00 - 09



### State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,968,000	-4%	39,075,000	-4%
NSW	2,711,000	-2%	61,293,000	6%
Victoria	1,531,000	4%	38,368,000	14%
Rest of Aus	1,354,000	1%	37,860,000	8%
Australia	5,131,000	0%	176,596,000	6%

Holiday visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,418,000	-5%	19,605,000	5%
NSW	1,546,000	-1%	20,140,000	13%
Victoria	772,000	1%	8,141,000	4%
Rest of Aus	758,000	-1%	11,970,000	5%
Australia	2,799,000	-2%	59,856,000	7%

As occurred nationally, QLD recorded an increase in VFR visitors, and a decline in holiday visitors. Unlike the nation however, the increase in VFR visitors was not sufficient to offset the declines in holiday visitors. QLD's decline in holiday visitors was driven by a decrease in Japanese visitors.



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)

Central Queensland region incorporates the Gladstone and Capricorn regions, and is based upon the ABS Fitzroy region. Central Queensland region also includes Miriam Vale and Monto Shires from the ABS Bundaberg region, as these are part of the Gladstone region.

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# Central Queensland Regional Snapshot

Year ended December 2009

## Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,176,000	-11%	13,136,000	-12%	3.1	-0.1	29%	40%	24%	27%
Gold Coast	3,206,000	-3%	13,552,000	-4%	4.2	-0.1	62%	27%	8%	20%
Sunshine Coast	2,680,000	-4%	11,593,000	7%	4.3	0.4	64%	28%	6%	17%
SEQC <sup>3</sup>	2,264,000	-9%	6,258,000	-14%	2.8	-0.1	40%	41%	15%	14%
TNQ	1,521,000	1%	7,868,000	6%	5.2	0.3	54%	23%	18%	10%
<b>CQ</b>	<b>1,130,000</b>	<b>17%</b>	<b>4,456,000</b>	<b>42%</b>	<b>3.9</b>	<b>0.7</b>	<b>39%</b>	<b>29%</b>	<b>23%</b>	<b>7%</b>
Toowoomba	1,016,000	-5%	3,427,000	19%	3.4	0.7	32%	38%	24%	6%
Fraser Coast	785,000	-2%	3,105,000	1%	4.0	0.2	51%	35%	11%	5%
Townsville	757,000	-10%	3,018,000	0%	4.0	0.4	40%	25%	29%	5%
Capricorn	568,000	-22%	2,338,000	2%	4.1	0.9	38%	29%	20%	4%
Mackay	550,000	-12%	1,984,000	-38%	3.6	-1.5	26%	27%	40%	3%
Bundaberg	516,000	-13%	2,129,000	12%	4.1	0.9	37%	43%	13%	3%
Whitsundays	404,000	-26%	1,710,000	-28%	4.2	-0.2	67%	19%	8%	3%
Outback	362,000	-13%	1,982,000	-8%	5.5	0.3	42%	12%	37%	2%
Gladstone	322,000	13%	1,464,000	n/p	4.5	1.5	51%	34%	9%	2%
Western Downs	278,000	-30%	1,019,000	2%	3.7	1.2	34%	32%	28%	2%
Southern Downs	223,000	1%	473,000	-28%	2.1	-0.9	57%	21%	19%	1%
<b>QLD</b>	<b>15,729,000</b>	<b>-6%</b>	<b>69,779,000</b>	<b>-3%</b>	<b>4.4</b>	<b>0.1</b>	<b>47%</b>	<b>32%</b>	<b>18%</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	913,000	2%	15,558,000	-7%	17.0	-1.6	56%	28%	11%	46%
Gold Coast	813,000	2%	7,715,000	-6%	9.5	-0.8	80%	15%	4%	41%
TNQ	651,000	-14%	6,236,000	-3%	9.6	1.1	91%	5%	2%	33%
Sunshine Coast	277,000	-1%	2,550,000	9%	9.2	0.8	79%	18%	2%	14%
Whitsundays	223,000	1%	1,308,000	5%	5.9	0.2	96%	3%	1%	11%
Fraser Coast	191,000	-5%	753,000	-15%	4.0	-0.4	95%	4%	0%	10%
Townsville	142,000	-2%	1,336,000	7%	9.4	0.8	82%	13%	2%	7%
<b>CQ</b>	<b>128,000</b>	<b>9%</b>	<b>1,304,000</b>	<b>35%</b>	<b>10.2</b>	<b>1.9</b>	<b>85%</b>	<b>9%</b>	<b>4%</b>	<b>7%</b>
SEQC <sup>3</sup>	117,000	4%	2,082,000	6%	17.8	0.4	40%	52%	5%	6%
Capricorn	74,000	0%	609,000	14%	8.2	1.0	86%	7%	3%	4%
Gladstone	61,000	11%	502,000	16%	8.2	0.3	85%	8%	3%	3%
Mackay	54,000	6%	491,000	n/p	9.1	3.6	76%	19%	6%	3%
Bundaberg	50,000	22%	687,000	29%	13.9	1.0	78%	18%	2%	3%
Toowoomba	36,000	-3%	593,000	1%	16.5	0.4	47%	33%	11%	2%
Outback	27,000	-16%	354,000	-4%	13.2	1.7	85%	4%	4%	1%
Western Downs	12,000	0%	162,000	42%	13.4	4.0	75%	17%	8%	1%
Southern Downs	9,000	50%	190,000	52%	20.7	-1.2	78%	11%	0%	0%
<b>QLD</b>	<b>1,968,000</b>	<b>-4%</b>	<b>39,075,000</b>	<b>-4%</b>	<b>19.9</b>	<b>0.1</b>	<b>72%</b>	<b>24%</b>	<b>8%</b>	<b>-</b>

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

1. Annual change refers to the percentage change between the year ended December 2009 vs. year ended December 2008.

2. Trend change refers to the percentage change between the 3 years to December 2008 vs. the 3 years to December 2009.

3. South East Queensland Country.

n/p – not published.