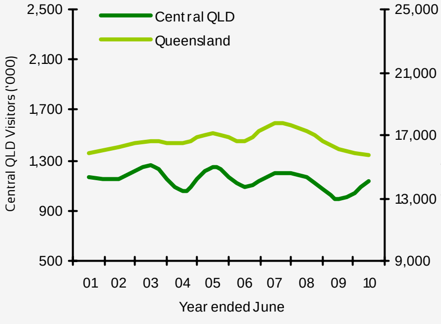
Central Qld Regional Snapshot

Tourism Queensland

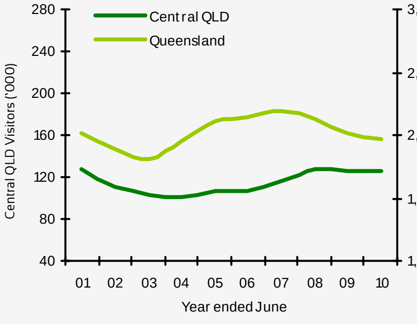
Year ended June 2010

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	1,128,000	416,000	335,000	292,000	$589
Annual change[1]	▲ 13%	▲ 5%	▲ 33%	▼ -2%	▲ 23%
Trend change[2]	▼ -2%	▲ 1%	▼ -4%	▼ -5%	▲ 5%
International overnight	125,000	108,000	12,000	5,000	n/p
Annual change	▼ -1%	▼ -1%	▲ 20%	▲ 25%	n/p
Trend change	▲ 2%	▲ 3%	▲ 3%	▼ -7%	n/p
TOTAL	1,253,000	524,000	347,000	297,000	n/p
Annual change	▲ 12%	▲ 4%	▲ 32%	▼ -1%	n/p

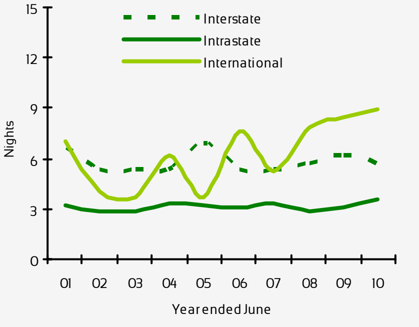
Domestic visitation



International visitation



Average length of stay (Central QLD)

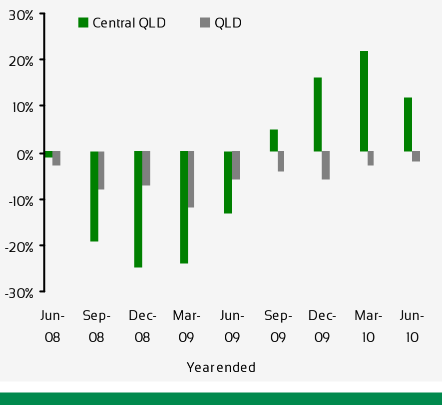


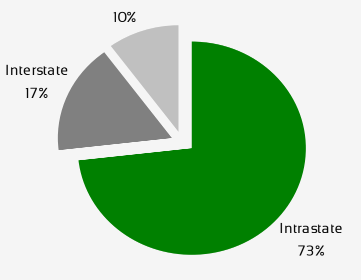
- In contrast to the state trend, Central Queensland (CQ) recorded an upturn in visitation from the domestic market. The primary driver of the growth was Brisbane residents returning to the region for a holiday or to visit friends or relatives (VFR).
- Regional Queensland residents (the largest domestic market to CQ) constrained holiday travel, however increased travel for VFR purposes.
- In a trend similar to the state, the boost in interstate holiday visitors further assisted the regions' result.
- The business market remained subdued, although recovered marginally on June 2009 levels. An increase in business confidence and more affordable airfares will perhaps further stimulate business recovery.

- International visitation remained relatively stable for the Central Queensland region (down 1%) over the year.
- United Kingdom (UK) and European youth markets (under 30 years old) were the more resilient travellers to Queensland in 2009; and CQ continued to see an increase in youth holiday visitors from these markets over the year ended June 2010..
- 59% of all international holiday visitors to Central Queensland were youth market visitors in the year ended June 2010.
- Approximately one in four European and UK youth visitors who made a stopover in the northern Queensland regions (Whitsundays, Townsville, and Tropical North Queensland) also made a stopover to CQ on their trip over the year.

- International visitor length of stay continued to increase, however the rate of growth tapered over the year. An increase in working holiday nights offset a decline in education visitor nights.
- Interstate visitor length of stay dipped overall, although holiday visitors length of stay increased (up 1.4 nights) to average 6.6 nights in region.
- Intrastate visitor length of stay increased, with visitors averaging 4 nights in region, this was driven by the return of Brisbane holiday visitors.
- Domestic expenditure returned to growth, up 23% to $589 million, driven by the increased length of stay of holiday and business visitors.

Total visitation





- There were **1,253,000** overnight visitors (domestic and international) to Central Queensland in the year ended June 2010, this was a 12% increase 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.

Stats on Q are you subscribed?

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statsonq@tq.com.au

Central Qld Regional Snapshot

Domestic visitation Year ended June 2010

Domestic visitors to Central Queensland

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	416,000	5%	1,741,000	29%	4.2	0.8
VFR	335,000	33%	1,245,000	1%	3.7	-1.2
Business	292,000	-2%	1,077,000	39%	3.7	1.1
Total[3]	1,128,000	13%	4,496,000	28%	4.0	0.5
Intrastate						
Holiday	318,000	-8%	1,094,000	2%	3.4	0.3
VFR	276,000	26%	967,000	-2%	3.5	-1.0
Business	256,000	-1%	869,000	n/p	3.4	1.5
Total	914,000	7%	3,277,000	25%	3.6	0.5
Interstate						
Holiday	98,000	n/p	647,000	n/p	6.6	1.4
Total	214,000	n/p	1,219,000	39%	5.7	-0.5

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Central QLD	2,083,000	46%	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 Central Queensland

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	665,000	-4%	2,195,000	12%
Brisbane	249,000	n/p	1,082,000	n/p
NSW	139,000	n/p	647,000	n/p

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.

Central Qld Regional Snapshot

International visitation Year ended June 2010

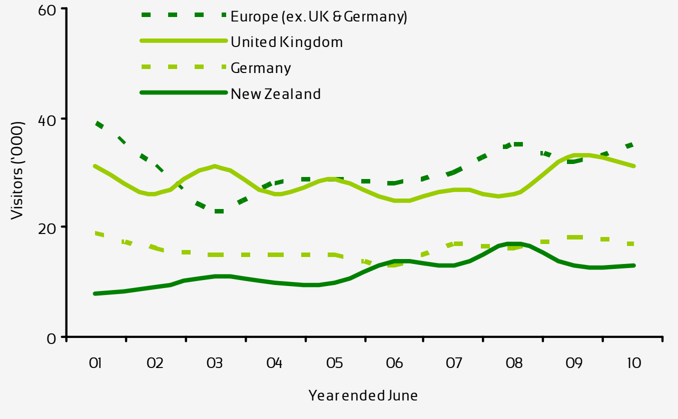
International visitors to Central Queensland

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	108,000	-1%	580,000	12%	5.4	0.7
VFR	12,000	20%	269,000	38%	21.8	2.3
Business	5,000	25%	68,000	n/p	12.5	5.9
Total[4]	125,000	-1%	1,111,000	4%	8.9	0.5

Key international source markets to Central Queensland

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	35,000	9%	145,000	-21%
United Kingdom	31,000	-6%	152,000	20%
Germany	17,000	-6%	54,000	n/p
New Zealand	13,000	0%	120,000	n/p

European, United Kingdom, German and New Zealand visitors to Central Queensland YE June 01 - 10



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

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.

Central Qld 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[5]	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[5]	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. This figure includes "Business" and "Other" visitors.
5. South East Queensland Country.

n/p not published.