Capricorn Regional Snapshot

Year ended March 2010

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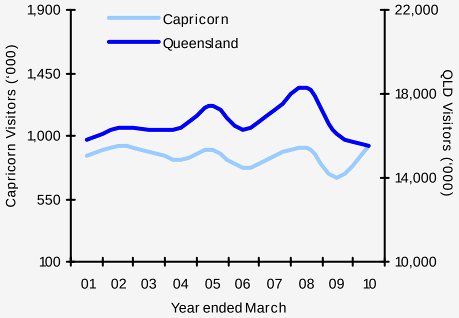
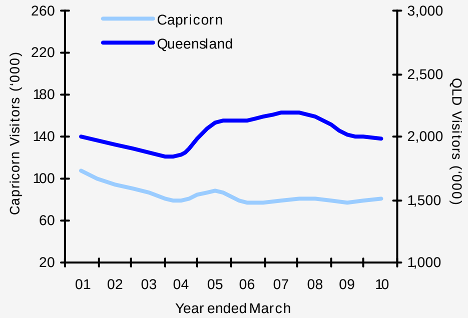
	Visitors	Holiday	VFR	Business
Domestic overnight	927,000	303,000	237,000	292,000
Annual change[1]	▲ 31%	▲ 29%	▲ 10%	▲ 31%
Trend change[2]	▲ 3%	▼ -5%	▲ 4%	▲ 5%
International overnight	81,000	69,000	8,000	n/p
Annual change	▲ 4%	▲ 1%	▲ 33%	n/p
Trend change	▲ 1%	▲ 1%	0%	n/p
TOTAL	1,008,000	372,000	245,000	n/p
Annual change	▲ 28%	▲ 23%	▲ 11%	n/p

Domestic visitation



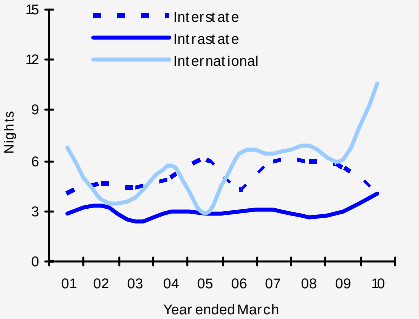
- Capricorn saw a strong recovery in the domestic market with growth from both holiday and business sectors in the year to March 2010.
- While it was business travel from residents of the Central Queensland region that drove the upswing in the business market, the growth from the holiday market came from a range of source markets from both within Queensland and interstate.
- Complementing the growth from holiday and business visitation was an increase in the regions' important VFR (visiting friends or relatives) market. VFR travel to the Capricorn region did not see the declines of holiday and business that occurred during the Global Financial Crisis.

International visitation



- Going against the state trend, the number of international visitors to the Capricorn region increased over the year to March 2010.
- The Capricorn region enjoyed a solid increase in the youth market (under 30 years of age) from Continental Europe, while the region saw a stable number of youth visitors from the UK over the last year.
- The youth market continues to prefer caravan and camping options and also backpacker hostels when staying in the region, while those over the age of 30 prefer hotel, motel or apartment accommodation.

Average length of stay (Capricorn)



- Domestic visitor average length of stay in the Capricorn region increased by 0.7 nights to average 4 nights.
- Intrastate average length of stay increased by 1 night to 4 nights, however interstate visitors reduced their time spent in region down 1.7 nights, to average 3.9 nights.
- International visitors average length of stay jumped 4.5 nights to average 10.6 nights in the year ended March 2010. Driven by an increase in both holiday and working holiday visitors' length of stay.

Tourist Accommodation[3]

	Hotels/Motels/Serviced apartments[4]
Guest arrivals	667,000
Annual change	-2%
Room occupancy	54.0%
Percentage point change	-9.8%
Average room rate	$119.00
Annual change	5%
Yield[5]	$64.25
Annual change	-11%

- Whilst overall visitation to the Capricorn region increased by 31% in the year ending March 2010, the commercial accommodation sector recorded a 2% decline in guest arrivals.
- Much of the growth in visitation to the Capricorn region did not occur in hotels, motels or serviced apartments. Over the last year, there was an increase in the number of holiday visitors staying in caravan or camping accommodation and also at the property of a friend or relative.

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 Capricorn

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	303,000	29%	1,077,000	48%	3.6	0.5
VFR	237,000	10%	950,000	-2%	4.0	-0.5
Business	292,000	31%	859,000	n/p	2.9	0.6
Total[6]	927,000	31%	3,704,000	n/p	4.0	0.7
Intrastate						
Holiday	239,000	23%	839,000	n/p	3.5	1.0
VFR	188,000	-1%	743,000	-2%	4.0	0.0
Business	266,000	32%	743,000	n/p	2.8	0.6
Total	771,000	28%	3,088,000	n/p	4.0	1.0
Interstate						
Total	156,000	51%	615,000	8%	3.9	-1.7

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Capricorn	1,319,000	19%	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 Capricorn

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	605,000	31%	1,927,000	n/p
Brisbane	166,000	17%	1,161,000	n/p

State comparison - Domestic

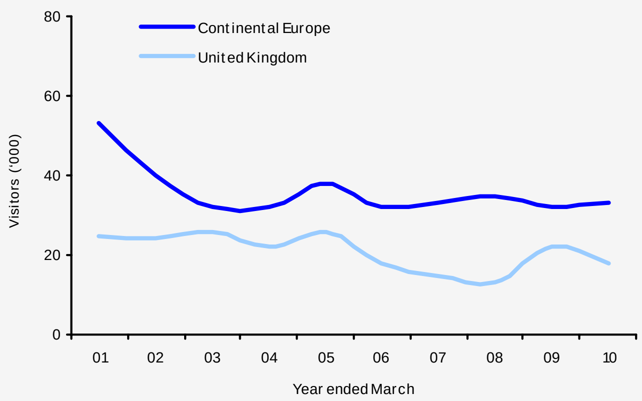
Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,531,000	-3%	69,857,000	2%
NSW	22,692,000	-2%	76,685,000	-3%
Victoria	15,856,000	-1%	50,044,000	2%
Rest of Aus	14,123,000	-5%	60,010,000	-6%
Australia	65,997,000	-3%	256,596,000	-1%
Holiday visitors				
Queensland	6,974,000	-4%	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%

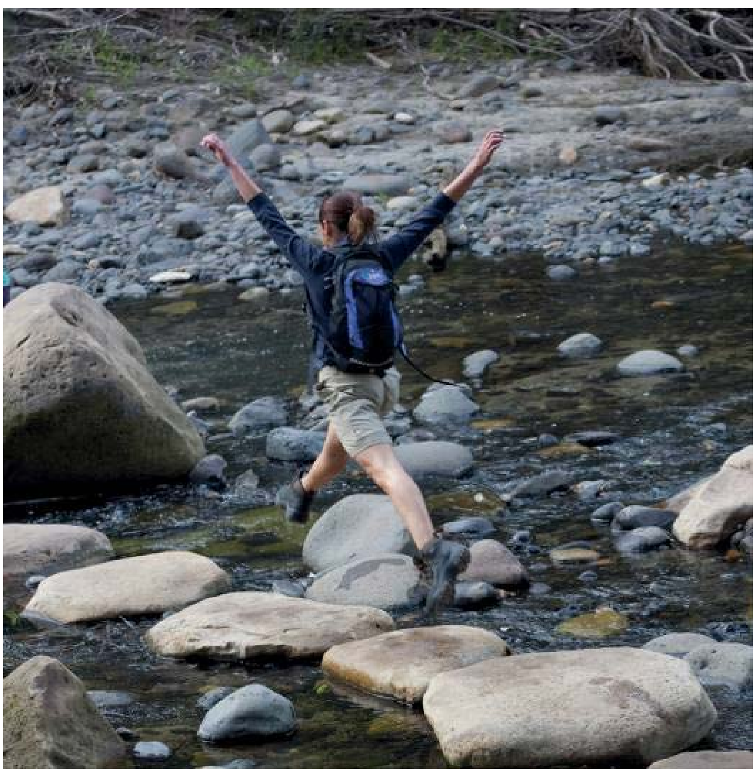
Holiday travel declined nationally, although an increase in interstate holiday visitors was recorded in Australia for the first time since 2007. QLD's holiday decline was offset by an increase in holiday nights and holiday expenditure over the year.

International visitors to Capricorn

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	69,000	1%	495,000	n/p	7.1	4.4
VFR	8,000	33%	182,000	50%	22.7	2.0
Total[7]	81,000	4%	866,000	n/p	10.6	4.5

European and United Kingdom visitors to Capricorn YE March 01 - 10





Key international source markets to Capricorn

Total visitors	Visitors	Annual % change	Nights	Annual % change
Continental Europe	33,000	3%	135,000	-8%
United Kingdom	18,000	-18%	95,000	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

Capricorn Region includes the city of Rockhampton and former Shires of Bauhinia, Duaringa, Emerald, Fitzroy, Jericho, Livingstone, Mount Morgan and Peak Downs.

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[8]	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. Tourist accommodation figures refer to the Fitzroy region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation March 2010.
4. Figures provided refer to hotels/motels/serviced apartments with five or more rooms.
5. Yield refers to average takings per room night available.
6. This figure includes "Other" visitors.
7. This figure includes "Business" and "Other" visitors.
8. South East Queensland Country.

n/p – not published.

Note: Capricorn regional data revised and re-published by Tourism Queensland on 20/07/2010.