

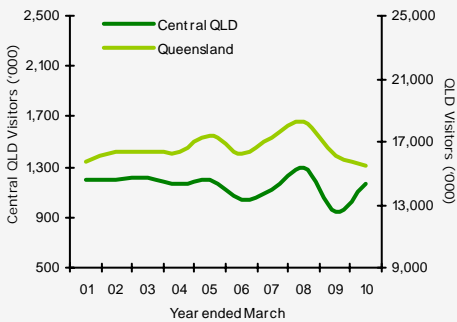
# Central Queensland Regional Snapshot

Year ended March 2010

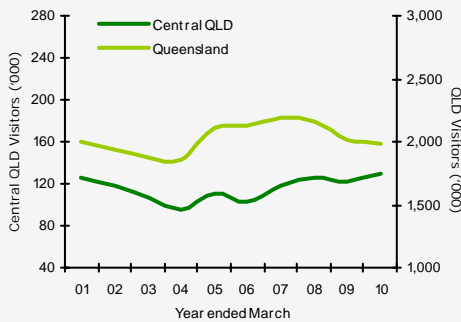


	Visitors	Holiday	VFR	Business	Expenditure (\$m)
<b>Domestic overnight</b>	1,172,000	406,000	346,000	318,000	\$636
Annual change <sup>1</sup>	▲ 24%	▲ 9%	▲ 35%	▲ 16%	▲ 31%
Trend change <sup>2</sup>	▲ 1%	▼ -3%	▲ 4%	▲ 2%	▲ 8%
<b>International overnight</b>	130,000	111,000	13,000	6,000	n/p
Annual change	▲ 7%	▲ 6%	▲ 44%	▲ 20%	n/p
Trend change	▲ 3%	▲ 3%	▲ 6%	▲ 7%	n/p
<b>TOTAL</b>	1,302,000	517,000	359,000	324,000	n/p
Annual change	▲ 22%	▲ 8%	▲ 35%	▲ 16%	n/p

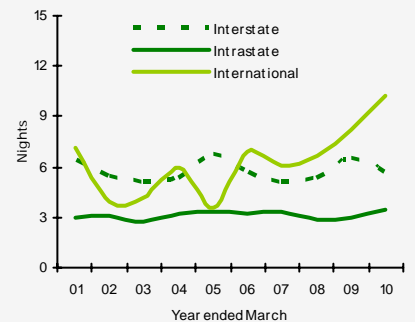
## Domestic visitation



## International visitation



## Average length of stay (Central QLD)



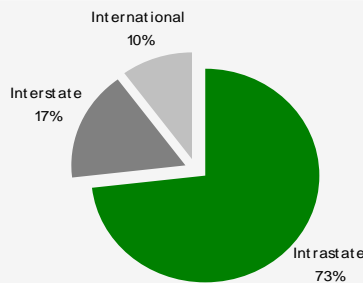
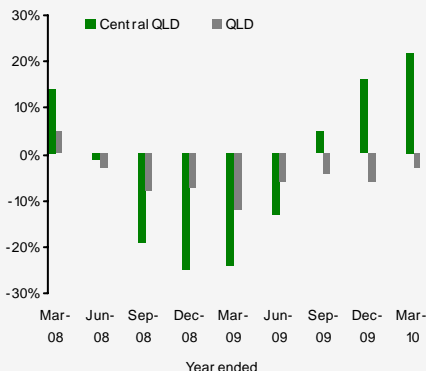
- A strong recovery from the intrastate visiting friends or relatives (VFR) and business sector bolstered Central Queensland's (CQ) domestic performance over the last year.
- Going against the state trend, the CQ region saw growth from VFR visitors, from both locals and residents of Brisbane.
- As with other regions where the resources sector is important, CQ saw a marked downturn in business visitation with the onset of the GFC. Fortunately, travel from the business sector is recovering.
- Complementing the domestic business and VFR results, CQ also experienced a recovery from the domestic holiday market from both Brisbane residents and interstate visitors. However, the number of locals taking an overnight holiday in the CQ region declined over the last year.

- The CQ region enjoyed an increase in the number of international visitors making a stopover in the region over the last year.
- The regions' largest source market, the United Kingdom (UK), remained stable while the number of visitors from Continental Europe increased. This was driven by a much stronger youth market (under 30 years old).
- One in five (20%) European youth visitors to Queensland now visit the CQ region.
- More than half of these visitors used self drive transport, while a significant proportion (36%) arrived in the region by long distance coach or bus.

- CQ has enjoyed an upturn in the average length of stay of international visitors, driven by the increasing prominence of working holiday visitors.
- Working holiday visitors typically spend an average of almost three months in the region and accounted for almost a quarter (24%) of all international nights spent in the CQ region.
- The average length of stay for intrastate visitors increased slightly, driven by holiday and business visitors.
- Interstate visitors to CQ for VFR, reduced their length of stay. This was responsible for the overall decline in the length of stay for interstate visitors to the region.

## Total visitation

Annual percentage change in visitation



- There were 1,302,000 overnight visitors (domestic and international) to Central Queensland in the year ended March 2010, this was a 22% increase 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.

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### Domestic visitors to Central Queensland

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	406,000	9%	1,684,000	34%	4.1	0.7
VFR	346,000	35%	1,304,000	11%	3.8	-0.8
Business	318,000	16%	1,054,000	n/p	3.3	0.6
<b>Total<sup>3</sup></b>	<b>1,172,000</b>	<b>24%</b>	<b>4,490,000</b>	<b>33%</b>	<b>3.8</b>	<b>0.2</b>
<b>Intrastate</b>						
Holiday	307,000	-4%	1,051,000	15%	3.4	0.5
VFR	288,000	30%	1,030,000	15%	3.6	-0.4
Business	280,000	18%	821,000	n/p	2.9	0.7
Total	956,000	19%	3,261,000	33%	3.4	0.4
<b>Interstate</b>						
Holiday	99,000	n/p	633,000	n/p	6.4	-0.2
Total	216,000	51%	1,229,000	33%	5.7	-0.8

### Key domestic source markets to Central Queensland

<b>Total visitors</b>	Visitors	Annual % change	Nights	Annual % change
Regional Qld	728,000	19%	2,317,000	37%
Brisbane	228,000	20%	944,000	26%
NSW	135,000	n/p	602,000	n/p

### State comparison - Domestic

<b>Total visitors</b>	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%
<b>Holiday visitors</b>				
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.

### Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Central QLD	1,941,000	34%	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.



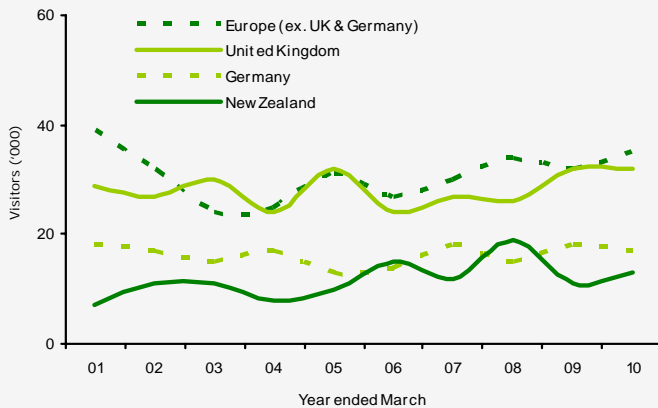
### International visitors to Central Queensland

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	111,000	6%	696,000	n/p	6.3	2.5
VFR	13,000	44%	298,000	n/p	23.4	5.5
<b>Total<sup>4</sup></b>	<b>130,000</b>	<b>7%</b>	<b>1,327,000</b>	<b>33%</b>	<b>10.2</b>	<b>2.0</b>

### Key international source markets to Central Queensland

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	35,000	9%	142,000	-33%
United Kingdom	32,000	0%	187,000	n/p
Germany	17,000	-6%	81,000	14%
New Zealand	13,000	18%	130,000	n/p

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



### 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](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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## 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 <sup>5</sup>	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%
<b>CQ</b>	<b>1,172,000</b>	<b>24%</b>	<b>4,490,000</b>	<b>33%</b>	<b>3.8</b>	<b>0.2</b>	<b>35%</b>	<b>30%</b>	<b>27%</b>	<b>8%</b>
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%
<b>Total</b>	<b>15,531,000</b>	<b>-3%</b>	<b>69,857,000</b>	<b>2%</b>	<b>4.5</b>	<b>0.2</b>	<b>45%</b>	<b>32%</b>	<b>19%</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	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%
<b>CQ</b>	<b>130,000</b>	<b>7%</b>	<b>1,327,000</b>	<b>33%</b>	<b>10.2</b>	<b>2.0</b>	<b>85%</b>	<b>10%</b>	<b>5%</b>	<b>7%</b>
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%
<b>Total</b>	<b>1,986,000</b>	<b>-2%</b>	<b>40,038,000</b>	<b>3%</b>	<b>20.2</b>	<b>0.9</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 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. This figure includes "Business" and "Other" visitors.

5. South East Queensland Country.

n/p – not published.