

Year ended March 2011

IMPORTANT MESSAGE:

Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), **domestic tourism region** data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, **domestic** data for **tourism regions** will be presented as a 3 year average, with change over time shown as a 3 year trend change, not year on year change as in previous regional snapshots. Please note that the trend variances provided incorporate changes that occurred in tourism during the onset of the Global Financial Crisis and look at longer term trends rather than recent changes over the last year.

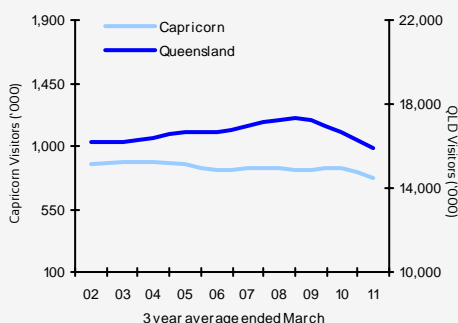
National and state level NVS data will be published as normal on a year ended basis.

Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.



	Visitors	Holiday	VFR	Business
Domestic overnight 3 year average	776,000	258,000	214,000	240,000
Trend change ²	▼ -9%	▼ -9%	▼ -7%	▼ -7%
International overnight	72,000	58,000	8,000	n/p
Annual change	▼ -11%	▼ -16%	▼ -1%	n/p
Trend change	▼ -4%	▼ -5%	● 0%	n/p

Domestic visitation



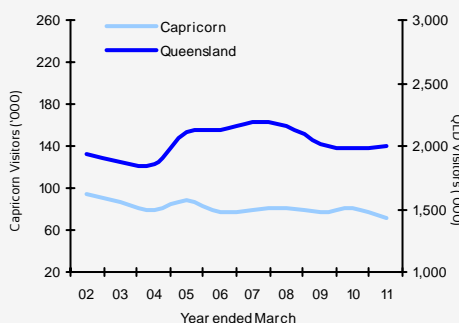
- Overall, the Capricorn region experienced a decline during the three years to March 2011, seen across all purpose of visit categories.

- Similar to the state trend, regional Queenslanders (particularly locals and from Gladstone) drove the downturn in travel to the Capricorn region deterred by the 2010/2011 floods and reduced accessibility for locals and those from neighbouring regions.

- In contrast, the Capricorn region recorded a moderate increase in business and holiday travellers from Brisbane.

- The interstate market has remained fairly resilient compared with intrastate markets, although it did experience a slight decline.

International visitation



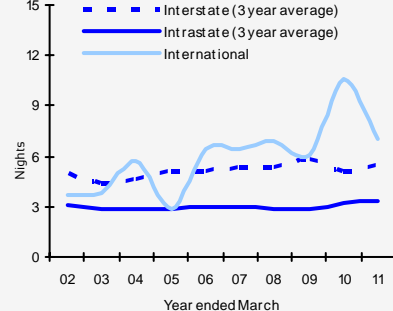
- International visitation declined to the Capricorn region in the year ended March 2011, as seen by most Queensland regions.

- Visitation from the United Kingdom (UK) - the region's largest international source market - declined, following the state and national trend. The continued downturn was also seen from most European markets.

- The youth market (under 30 years) from Europe was more heavily impacted by the economic circumstances of their home countries than their older counterparts.

- Reflecting this, the number of international travellers staying in Caravans or Backpacker / hostel accommodation while in Capricorn had the greatest declines.

Average length of stay (Capricorn)



- International visitors reduced their average length of stay (ALOS) to 7 nights in the Capricorn region in the year ended March 2011.

- The decline in international visitors' ALOS was driven by employment and education.

- International visitors on holiday stayed an average 4.4 nights, and this declined over the year by 2.7 nights.

- Interstate visitors average length of stay increased, driven by holiday visitors staying longer to average one week in region.

- Intrastate visitor length of stay remained stable at an average of 3.3 nights, as visitors continued to visit the region for short breaks.

Tourist Accommodation³

	Hotels/Motels/Serviced apartments ⁴
Guest arrivals	446,000
Annual change	0%
Room occupancy	60.1%
Percentage point change	3.1%
Average room rate	\$122.25
Annual change	1%
Yield ⁵	\$73.49
Annual change	6%

- In the year ending March 2011, guest arrivals to Capricorn's commercial accommodation sector remained stable. Please note these figures are not comparable to domestic trend changes above.

- While the average room rate increased only slightly by 2%, there was a moderate increase in room occupancy by 3.1 percentage points which saw yield increase 6%.

For more information on commercial accommodation for this region, please refer to the 'Tourist Accommodation Data Sheet' available on the Tourism Queensland website.

The data included in this report is sourced from the National and International Visitor surveys conducted by Tourism Research Australia. These large and comprehensive surveys 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 visitation

Domestic visitors to Capricorn 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	258,000	-9%	988,000	0%	3.8	0.4
VFR	214,000	-7%	815,000	-10%	3.8	-0.1
Business	240,000	-7%	651,000	-3%	2.7	0.1
Total⁶	776,000	-9%	2,847,000	-4%	3.7	0.2
Intrastate						
Holiday	201,000	-11%	590,000	-10%	2.9	0.0
VFR	180,000	-8%	643,000	-7%	3.6	0.0
Business	218,000	-7%	574,000	-1%	2.6	0.2
Total	646,000	-10%	2,132,000	-7%	3.3	0.1
Interstate						
Total	130,000	-2%	715,000	6%	5.5	0.4

Domestic day trip visitors year ended March 2011

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Capricorn ⁷	1,162,000	-9%	n/p	n/p
Queensland	34,258,000	7%	\$3,627	7%
Australia	151,948,000	3%	\$14,950	-1%

Consumers remain budget conscious with global and domestic uncertainties continuing to subdue consumer confidence. As a result, domestic travellers are increasingly taking more affordable day trips, rather than overnight trips.

Key domestic source markets to Capricorn 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Regional Qld	488,000	-13%	1,376,000	-12%
Brisbane	158,000	1%	756,000	4%

State comparison Domestic year ended March 2011

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,037,000	3%	67,025,000	-4%
NSW	23,505,000	4%	79,124,000	3%
Victoria	16,084,000	1%	49,663,000	-1%
Rest of Aus	14,251,000	1%	61,230,000	2%
Australia	67,605,000	2%	257,042,000	0%
Holiday visitors				
Queensland	6,914,000	-1%	33,885,000	-3%
NSW	10,203,000	-1%	38,833,000	2%
Victoria	7,504,000	0%	25,048,000	-1%
Rest of Aus	6,168,000	-2%	28,744,000	-1%
Australia	29,676,000	-1%	126,510,000	-1%

Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.



International visitation Year ended March 2011

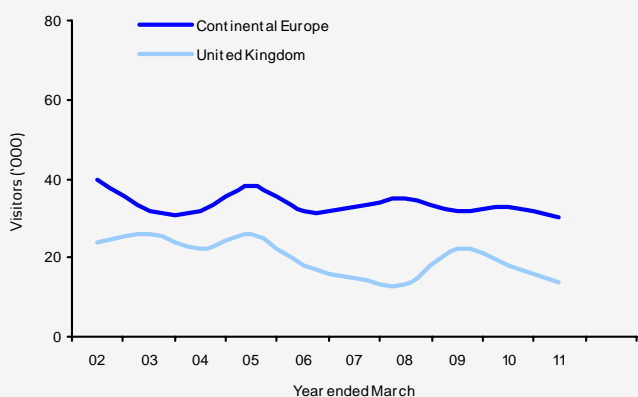
International visitors to Capricorn

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	58,000	-16%	257,000	-48%	4.4	-2.7
VFR	8,000	-1%	144,000	-21%	18.1	-4.6
Total⁷	72,000	-11%	499,000	-42%	7	-3.6

Key international source markets to Capricorn

	Visitors	Annual % change	Nights	Annual % change
Total visitors				
Continental Europe	30,000	-9%	76,000	-44%
United Kingdom	14,000	-22%	62,000	-35%

European and United Kingdom visitors to Capricorn YE March 02-11



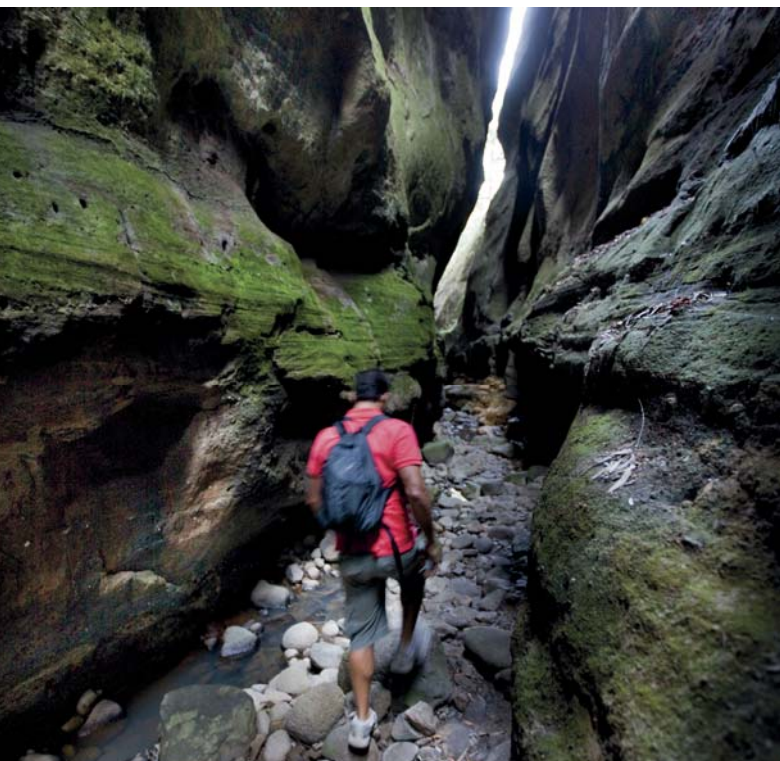
State comparison - International

	Visitors	Annual % change	Nights	Annual % change
Total visitors				
Queensland	2,002,000	1%	39,474,000	-1%
NSW	2,829,000	3%	66,266,000	7%
Victoria	1,693,000	10%	40,628,000	2%
Rest of Aus	1,394,000	3%	40,232,000	3%
Australia ⁸	5,396,000	4%	186,600,000	3%

Holiday visitors

Queensland	1,379,000	-3%	17,804,000	-8%
NSW	1,573,000	0%	20,642,000	-2%
Victoria	810,000	7%	7,910,000	-2%
Rest of Aus	755,000	1%	11,414,000	-7%
Australia ⁸	2,866,000	1%	57,770,000	-5%

International tourism to Australia recovered in the year ending March 2011, boosted by long-haul business and visitation from China. Queensland saw similar trends, although growth was more subdued due to the decline in international holiday visitors, particularly those from the United Kingdom, New Zealand and the United States.



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, Daringa, Emerald, Fitzroy, Jericho, Livingstone, Mount Morgan and Peak Downs.

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Regional Visitation

Domestic Regional Comparison

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,538,000	-1%	14,155,000	-1%	3.1	0.0	29%	38%	26%	28%
Gold Coast	3,243,000	-3%	13,437,000	-7%	4.1	-0.2	61%	27%	9%	20%
Sunshine Coast	2,615,000	-5%	10,560,000	-6%	4.0	-0.1	61%	29%	7%	16%
TNQ	1,384,000	-7%	7,393,000	-4%	5.3	0.2	55%	24%	17%	9%
Toowoomba	1,186,000	-5%	3,526,000	-1%	3.0	0.1	31%	41%	21%	7%
Townsville	783,000	-12%	3,011,000	-9%	3.8	0.1	33%	28%	29%	5%
Capricorn	776,000	-9%	2,847,000	-4%	3.7	0.2	33%	28%	31%	5%
Mackay	588,000	-10%	2,388,000	-9%	4.1	0.1	27%	28%	40%	4%
Fraser Coast	572,000	1%	2,326,000	-5%	4.1	-0.3	49%	33%	14%	4%
Bundaberg	513,000	-5%	1,819,000	-7%	3.5	-0.1	35%	37%	19%	3%
Whitsundays	458,000	-3%	1,973,000	1%	4.3	0.2	69%	16%	12%	3%
Outback	361,000	-10%	1,867,000	-6%	5.2	0.2	37%	19%	37%	2%
Gladstone	312,000	-4%	1,323,000	10%	4.2	0.6	46%	30%	20%	2%
Western Downs	301,000	-22%	878,000	-19%	2.9	0.1	43%	26%	24%	2%
Southern Downs	247,000	0%	586,000	-4%	2.4	-0.1	52%	31%	13%	2%
Total	15,876,000	-5%	68,430,000	-5%	4.3	0.0	44%	32%	20%	-

Please note the total for all regions uses 3 year average visitation data and trend % change to provide a meaningful point of comparison with the regional data presented. The total figures above will differ to those in the State Comparison on page 2 of this snapshot, which use year end March 2011 visitation data and year on year % change.

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	926,000	1%	17,018,000	6%	18.4	0.9	49%	30%	13%	46%
Gold Coast	783,000	-6%	7,799,000	-5%	10.0	0.1	77%	16%	5%	39%
TNQ	661,000	0%	5,830,000	-7%	8.8	-0.7	91%	5%	3%	33%
Sunshine Coast	271,000	-3%	2,646,000	4%	9.8	0.7	78%	18%	3%	14%
Whitsundays	191,000	-14%	1,086,000	-15%	5.7	-0.1	96%	3%	1%	10%
Fraser Coast	151,000	-19%	565,000	-26%	3.7	-0.4	97%	4%	0%	8%
Townsville	124,000	-14%	1,361,000	-2%	11.0	1.4	78%	13%	5%	6%
Capricorn	72,000	-11%	499,000	-42%	7.0	-3.6	81%	11%	4%	4%
Gladstone	57,000	-11%	243,000	-47%	4.3	-2.9	88%	7%	5%	3%
Mackay	46,000	-16%	350,000	-20%	7.6	-0.4	76%	17%	7%	2%
Bundaberg	40,000	-13%	746,000	18%	18.6	5.0	78%	15%	0%	2%
Toowoomba	36,000	-8%	703,000	3%	19.6	2.1	44%	33%	14%	2%
Outback	24,000	-11%	253,000	-26%	10.5	-2.2	75%	13%	8%	1%
Western Downs	12,000	0%	167,000	8%	14.1	1.3	58%	17%	8%	1%
Southern Dns	10,000	25%	205,000	24%	20.0	0.6	70%	30%	0%	0%
Total	2,002,000	1%	39,474,000	-1%	19.7	-0.5	69%	25%	9%	-

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

1. Trend change refers to the percentage change between the 3 years average ended March 2010 vs. the 3 years average ended March 2011.

2. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.

3. Tourist accommodation figures refer to the Northern region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation December 2010.

4. Figures provided refer to hotels/motels/serviced apartments with fifteen 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. Excludes Transit visitors who did not have a stopover place.

n/p not published.