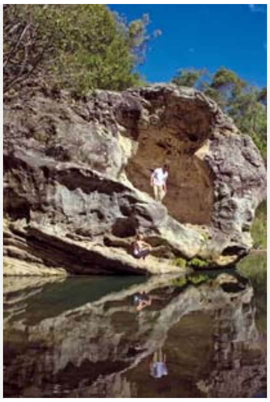
Capricorn Regional Snapshot

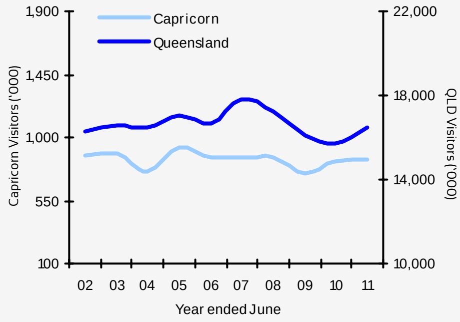
Tourism Queensland

Year ended June 2011



	Visitors	Holiday	VFR	Business
Domestic overnight	837,000	279,000	262,000	221,000
Annual change[1]	▲ 1%	▼ -9%	▲ 27%	▼ -8%
Trend change[2]	▼ -1%	▼ -5%	▲ 7%	▼ -2%
International overnight	68,000	56,000	7,000	n/p
Annual change	▼ -12%	▼ -15%	▼ -13%	n/p
Trend change	▼ -5%	▼ -7%	● 0%	n/p
TOTAL	905,000	335,000	269,000	n/p
Annual change	● 0%	▼ -10%	▲ 26%	n/p

Domestic visitation

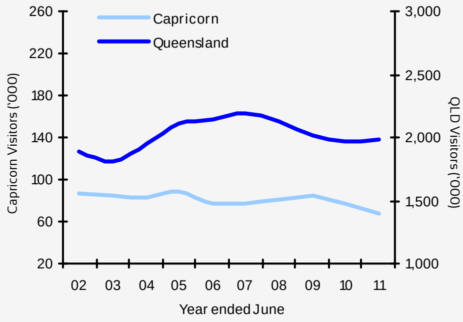


▪ Domestic visitation to the Capricorn region remained relatively stable. The declines in visitation in the March quarter (attributable to the QLD floods) were offset by a strong recovery in the June quarter.

▪ In the year ended June 2011, the growth achieved from VFR (visiting friends and relatives) was offset by declines in holiday and business travel.

▪ Although intrastate holiday visitation declined overall for Capricorn, the region did enjoy growth from it's largest holiday source markets, being locals from within Central Queensland (CQ) and residents of Brisbane. Intrastate growth from VFR was also driven mainly by residents from CQ. .

International visitation

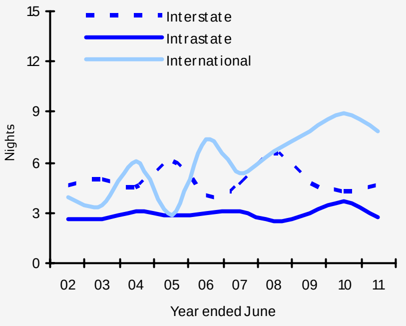


▪ International visitation to Capricorn declined during the year ending June 2011, due to a softer holiday market. The declines in the holiday market were driven by the United Kingdom (UK) and New Zealand (NZ).

▪ The UK is Capricorn's largest international source market. Travel from the UK to Australia has remained weak, the result of instability in the country's economy, high youth unemployment and unfavourable exchange rates. This has particularly impacted the youth market, a market on which the Capricorn region is reliant.

▪ NZ travel to Capricorn and Queensland has also slowed in the aftermath of the Christchurch earthquake.

Average length of stay (Capricorn)



▪ International visitors reduced their length of stay in the Capricorn region in the year ending June 2011 (down 1.1 nights). This was mainly driven by education and employment.

▪ The Americas and Asia were the key source markets to decrease their average stay in the Capricorn region.

▪ Domestic overnight visitors decreased their average stay in Capricorn by 0.8 nights. This was driven by intrastate visitors shortening their stay (down 1 night), while interstate visitors lengthened their stay (up 0.4 nights).

▪ Holiday visitors average stay was relatively stable at 3.5 nights (down 0.1 nights).

Tourist Accommodation[3]

	Hotels/Motels/Serviced apartments[4]
Guest arrivals	445,000
Annual change	-1%
Room occupancy	61.4%
Percentage point change	4.9%
Average room rate	$123
Annual change	2%
Yield[5]	$76
Annual change	11%

▪ Overall visitation to the Capricorn region was stable in the year ending June 2011. The commercial accommodation sector was also relatively stable, recording just a 1% decline in guest arrivals compared with the previous year.

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

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Capricorn Regional Snapshot

Domestic visitation Year ended June 2011

Domestic visitors to Capricorn

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	279,000	-9%	978,000	-12%	3.5	-0.1
VFR	262,000	27%	739,000	-8%	2.8	-1.1
Business	221,000	-8%	572,000	-33%	2.6	-1.0
Total[6]	837,000	1%	2,506,000	-21%	3.0	-0.8
Intrastate						
Holiday	223,000	-9%	668,000	-21%	3.0	-0.5
VFR	230,000	47%	620,000	5%	2.7	-1.1
Business	202,000	-6%	524,000	-30%	2.6	-0.9
Total	713,000	5%	1,927,000	-24%	2.7	-1.0
Interstate						
Total	124,000	-18%	579,000	-11%	4.7	0.4

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Capricorn	1,070,000	-27%	n/p	n/p
Queensland	33,684,000	1%	$3,408	-5%
Australia	151,915,000	1%	$14,830	-4%

Nationally, the previous growth in day trips slowed and the amount which they spent on their trips declined. Low consumer confidence and increasing costs of living has seen domestic visitors reduce their spending on travel.

Key domestic source markets to Capricorn

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	543,000	8%	1,434,000	-15%
Brisbane	170,000	-3%	493,000	n/p

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,429,000	4%	68,489,000	-3%
NSW	24,106,000	5%	81,126,000	5%
Victoria	16,360,000	3%	50,005,000	0%
Rest of Aus	14,321,000	1%	60,310,000	-1%
Australia	68,944,000	4%	259,931,000	0%
Holiday visitors				
Queensland	6,960,000	-1%	34,008,000	-2%
NSW	10,234,000	-2%	39,375,000	2%
Victoria	7,724,000	3%	25,652,000	2%
Rest of Aus	6,130,000	-3%	28,313,000	-3%
Australia	29,904,000	-1%	127,349,000	0%

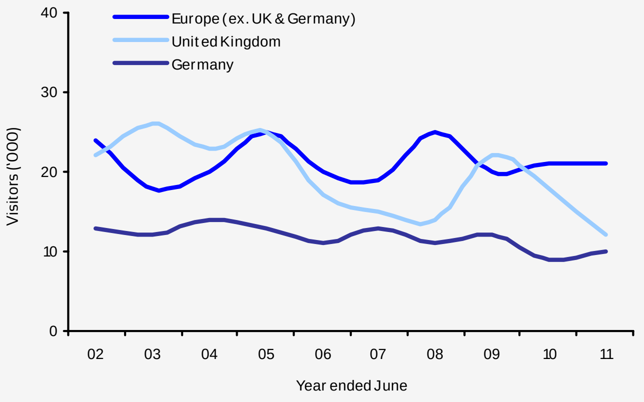
While domestic visitation has increased, these travellers are tending to stay closer to home, making less stopovers and are spending less. Even the previous rapid growth in outbound travel has slowed, particularly due to recent increases in the cost of airfares.

International visitation Year ended June 2011

International visitors to Capricorn

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	56,000	-15%	274,000	-28%	4.9	-0.9
VFR	7,000	-13%	156,000	-5%	20.8	0.6
Total[7]	68,000	-12%	530,000	-23%	7.8	-1.1

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



Key international source markets to Capricorn

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	21,000	0%	55,000	-39%
United Kingdom	12,000	-33%	84,000	-1%
Germany	10,000	11%	27,000	-7%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,989,000	1%	39,644,000	2%
NSW	2,812,000	1%	67,436,000	7%
Victoria	1,734,000	12%	41,081,000	0%
Rest of Aus	1,415,000	5%	40,990,000	5%
Australia	5,416,000	4%	189,150,000	4%
Holiday visitors				
Queensland	1,345,000	-5%	17,724,000	-5%
NSW	1,565,000	0%	21,000,000	-1%
Victoria	842,000	12%	8,076,000	-5%
Rest of Aus	759,000	3%	11,543,000	-4%
Australia	2,861,000	1%	58,343,000	-4%

International visitation to Australia continued to grow, boosted by expanding air capacity and travel for VFR and business. Asian markets have remained buoyant, fuelled by increasing standards of living in these countries.

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.

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.

Capricorn Regional Snapshot

Year ended June 2011

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	5,045,000	18%	15,348,000	13%	3.0	-0.2	29%	36%	27%	31%
Gold Coast	3,300,000	1%	13,034,000	-6%	3.9	-0.3	56%	29%	10%	20%
Sunshine Coast	2,783,000	14%	10,652,000	0%	3.8	-0.5	58%	28%	10%	17%
TNQ	1,266,000	-10%	7,270,000	-6%	5.7	0.2	55%	19%	21%	8%
Toowoomba	1,250,000	0%	3,490,000	-11%	2.8	-0.4	32%	36%	23%	8%
Capricorn	**837,000**	**1%**	**2,506,000**	**-21%**	**3.0**	**-0.8**	**33%**	**31%**	**26%**	**5%**
Townsville	716,000	-9%	2,677,000	-20%	3.7	-0.5	34%	35%	24%	4%
Mackay	575,000	-4%	1,982,000	-16%	3.4	-0.6	25%	28%	37%	3%
Bundaberg	502,000	-4%	1,631,000	-17%	3.3	-0.4	33%	29%	30%	3%
Fraser Coast	495,000	-10%	1,775,000	-18%	3.6	-0.3	48%	30%	15%	3%
Whitsundays	490,000	6%	2,080,000	-2%	4.2	-0.4	65%	25%	9%	3%
Gladstone	408,000	22%	1,576,000	19%	3.9	-0.1	48%	28%	21%	2%
Western Downs	365,000	n/p	970,000	n/p	2.7	-0.2	51%	19%	24%	2%
Outback	310,000	n/p	1,565,000	n/p	5.0	-0.7	45%	15%	34%	2%
Southern Downs	298,000	n/p	751,000	n/p	2.5	0.4	50%	35%	12%	2%
Total	**16,429,000**	**4%**	**68,489,000**	**-3%**	**4.2**	**-0.3**	**42%**	**32%**	**21%**	**-**

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	928,000	3%	17,116,000	8%	18.5	1.0	49%	30%	14%	47%
Gold Coast	753,000	-9%	7,723,000	-4%	10.3	0.5	77%	16%	5%	38%
TNQ	649,000	-1%	5,663,000	-7%	8.7	-0.6	91%	5%	3%	33%
Sunshine Coast	260,000	-7%	2,678,000	7%	10.3	1.4	76%	20%	3%	13%
Whitsundays	187,000	-12%	1,086,000	-6%	5.8	0.4	96%	2%	1%	9%
Fraser Coast	148,000	-17%	543,000	-28%	3.7	-0.5	95%	5%	0%	7%
Townsville	120,000	-13%	1,306,000	-8%	10.9	0.6	78%	13%	5%	6%
Capricorn	**68,000**	**-12%**	**530,000**	**-23%**	**7.8**	**-1.1**	**82%**	**10%**	**4%**	**3%**
Gladstone	55,000	-14%	251,000	-40%	4.6	-2.0	85%	9%	5%	3%
Mackay	46,000	-12%	420,000	3%	9.1	1.2	74%	20%	7%	2%
Toowoomba	39,000	5%	872,000	34%	22.4	4.6	44%	33%	13%	2%
Bundaberg	39,000	-7%	735,000	14%	19.0	3.7	74%	18%	3%	2%
Outback	24,000	n/p	255,000	n/p	10.6	-1.2	71%	13%	13%	1%
Western Downs	14,000	n/p	275,000	n/p	19.5	4.3	57%	14%	7%	1%
Southern Downs	11,000	n/p	296,000	n/p	27.3	15.8	64%	18%	9%	1%
Total	**1,989,000**	**1%**	**39,644,000**	**2%**	**19.9**	**0.1**	**68%**	**25%**	**10%**	**-**

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 2011.
2. Trend change refers to the percentage change between the 3 years to June 2010 vs. the 3 years to June 2011.
3. Tourist accommodation figures refer to the Central Queensland 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.

n/p not published.