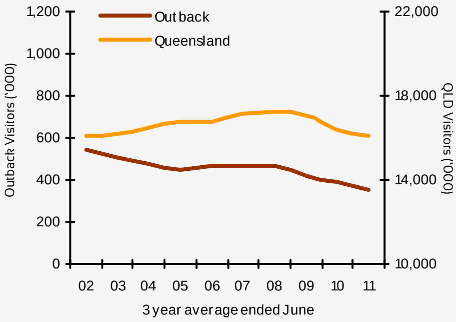
Outback Regional Snapshot

Year ended June 2011

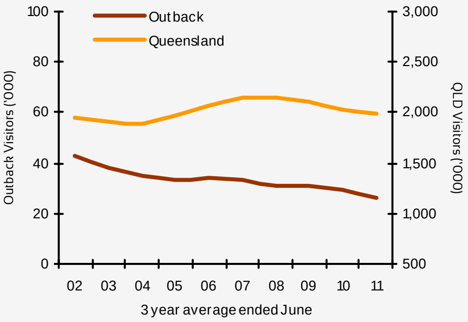
	Visitors	Holiday	VFR	Business
Domestic overnight	310,000	139,000	47,000	104,000
Trend change[1]	▼ -12%	▼ -14%	▼ -23%	▼ -5%
International overnight	24,000	17,000	n/p	n/p
Trend change	▼ -9%	▼ -12%	n/p	n/p
TOTAL	334,000	156,000	n/p	n/p
Trend change	▼ -12%	▼ -13%	n/p	n/p

Domestic visitation



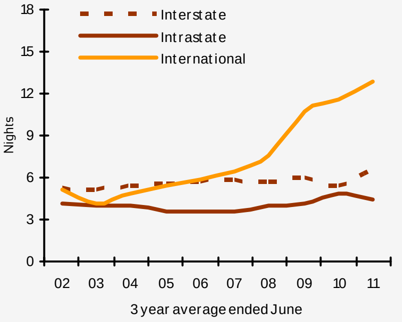
- During the three years to June 2011, domestic visitation to the Outback region declined with the impact of flooding in 2010-2011 still evident.
- Intrastate holiday and VFR visitation saw the most significant declines for the Outback region. Intrastate travel to the Outback represents 70% of all visitors to the region, the majority of which are from Regional QLD, where flooding was widespread.
- While many source markets declined, the Outback recorded an increase in visitation from regional NSW, primarily driven by growth in holiday travel.
- Interstate travel has softened at a national level from key interstate source markets of Sydney and Melbourne, driven by low to middle income households.

International visitation



- The Outback continued to see a decline in international visitation, although the rate of decline has slowed.
- Economic instability across Europe has continued to impact youth travel to Australia and for the Outback.
- At a national level, there has been a decline in the number of international visitors dispersing into regional areas, driven by the changing market composition (i.e. declines in long-stay youth visitors and growth in short-stay business travellers). This reduced dispersal has impacted many regional destinations in Queensland including the Outback.
- The international drive market has weakened for the Outback, with reduced accessibility during the floods a factor behind this decline.

Average length of stay (Outback)



- The average length of stay of international visitors to the Outback region continued to increase during the three years ending June 2011. International visitors' average length of stay in the Outback has been increasing for the past ten years.
- International business visitors increased their stay in the region, while employment and VFR visitors reduced their stay in the Outback.
- Domestic visitors increased their average stay in the Outback in the three years ending June 2011, driven by the interstate market.
- The interstate market increased their average stay by 1.1 nights. However, intrastate visitors reduced their average length of stay in the region, albeit only slightly.

Tourist Accommodation[3]

	Hotels/Motels/Serviced apartments[4]
Guest arrivals	178,000
Annual change[2]	-10%
Room occupancy	55.4%
Percentage point change	0.6%
Average room rate	$110
Annual change	4%
Yield[5]	$61
Annual change	6%

- The number of guest arrivals in commercial accommodation declined by 10% over the year ending June 2011, indicating that the previous declines in commercial accommodation in the Outback are slowing.

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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statsonq@tq.com.au

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. Due to the small sample size achieved in the Outback region, all data is reported on a three year trend basis.

Outback Regional Snapshot

Tourism Queensland

Domestic and International visitation Year ended June 2011

Domestic visitors to the Outback

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights trend change
Holiday	139,000	-14%	751,000	-6%	5.4	0.4
VFR	47,000	-23%	254,000	-11%	5.5	0.9
Business	104,000	-5%	393,000	-18%	3.8	-0.6
Total[2]	310,000	-12%	1,565,000	-10%	5.0	0.1
Intrastate						
Holiday	77,000	-18%	286,000	-23%	3.7	-0.3
VFR	37,000	-24%	214,000	-7%	5.7	1.2
Business	99,000	-3%	224,000	-26%	2.3	-1.1
Total	216,000	-13%	771,000	-18%	3.6	-0.3
Interstate						
Holiday	62,000	-8%	465,000	16%	7.5	1.3
Total	94,000	-9%	794,000	9%	8.4	1.1

International visitors to the Outback

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights trend Change
Holiday	17,000	-12%	108,000	-10%	6.3	0.1
Total[7]	24,000	-9%	255,000	0%	10.6	1.3

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

The Outback region includes the ABS Outback region, excluding Burke, Carpentaria, Mornington and Unincorporated islands, as well as Roma, Bungil, Bendemere, Warroo and Balonne.

State comparison - Domestic

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

State comparison - International

Total visitors	Visitors	Trend % change	Nights	Trend % change
Queensland	1,989,000	-2%	39,644,000	1%
NSW	2,812,000	0%	67,436,000	6%
Victoria	1,734,000	6%	41,081,000	9%
Rest of Aus	1,415,000	2%	40,990,000	7%
Australia	5,416,000	2%	189,150,000	5%
Holiday visitors				
Queensland	1,345,000	-5%	17,724,000	-1%
NSW	1,565,000	-1%	21,000,000	5%
Victoria	842,000	3%	8,076,000	0%
Rest of Aus	759,000	-1%	11,543,000	2%
Australia	2,861,000	-1%	58,343,000	2%

Outback 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. Trend change refers to the percentage change between the 3 years to June 2010 vs. the 3 years to June 2011.
2. Annual change refers to the percentage change between the year ended June 2010 vs. year ended June 2011.
3. Tourist accommodation figures refer to the Outback 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.