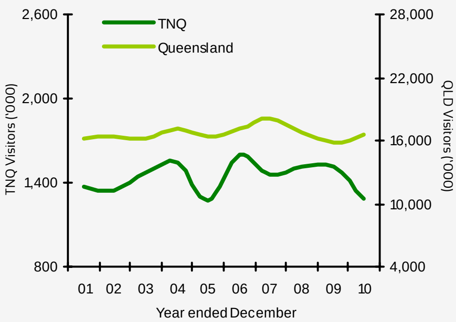
Tropical North Qld Regional Snapshot

Tourism Queensland

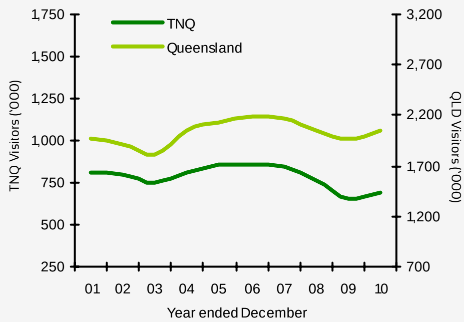
Year ended December 2010

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	1,282,000	705,000	298,000	247,000	$1,440
Annual change[1]	▼ -16%	▼ -15%	▼ -16%	▼ -9%	▼ -17%
Trend change[2]	▼ -4%	▼ -5%	▼ -2%	▼ -3%	▼ -2%
International overnight	686,000	625,000	31,000	18,000	$795
Annual change	▲ 5%	▲ 6%	▼ -3%	▲ 13%	▼ -2%
Trend change	▼ -7%	▼ -7%	▼ -4%	▼ -18%	▼ -9%
TOTAL	1,968,000	1,330,000	329,000	265,000	$2,235
Annual change	▼ -9%	▼ -6%	▼ -15%	▼ -8%	▼ -12%

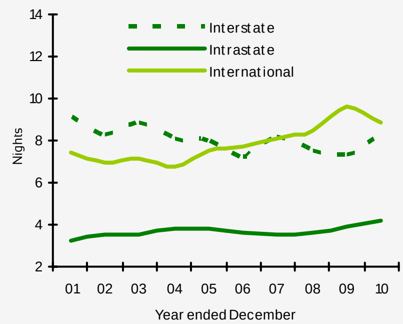
Domestic visitation



International visitation



Average length of stay (TNQ)

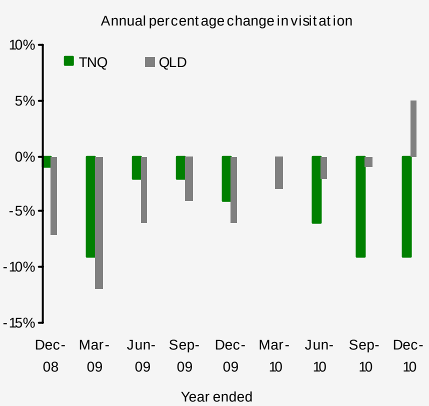


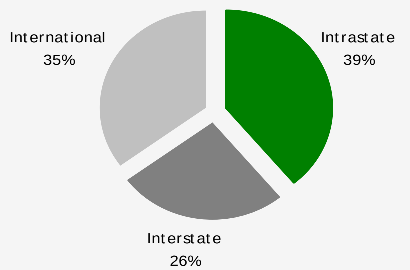
- Tropical North Queensland (TNQ) residents reduced holiday travel within TNQ over the year, and this continued to underpin the regions decline. A weak local economy clearly impacting local residents ability to travel.
- Significant weather events towards the end of 2010 which caused road closures such as the Bruce Highway, has also contributed to the regions results.
- A 17% decline in the number of Queenslanders driving to TNQ for a holiday was recorded.
- Townsville resident increased their holiday travel to TNQ, however holiday travel from Melbourne and Sydney weakened.

- TNQ's international recovery continued in 2010, following a period of decline in 2009. The rebound in the Japanese market and significant growth from China driving the results.
- Increasing air capacity has resulted in a boost to the number of New Zealand couples holidaying in TNQ over the year.
- United Kingdom (UK) visitors shortened their length of stay in TNQ, particularly towards the end of 2010. Weather events hampered dispersal of UK visitors within the state, and this downturn was also seen to many Queensland destinations.
- Youth visitors (under 30 years old) from the UK and Europe softened to TNQ and to Queensland over the year.

- TNQ saw an increase in average length of stay from intrastate and interstate holiday visitors.
- Domestic expenditure declined by 17% to $1.4 billion driven by a decline in the local market.
- A downturn in international visitor length of stay was driven by working holiday and education visitor shortening their stay. In contrast, international visiting friends or relative visitors increased their time spent in region.
- International expenditure declined 2% to $795 million. The increase in visitation from the shorter staying Asian markets, did not offset the downturn in visitation from the longer staying UK and European markets.

Total visitation





- There were **1,968,000** domestic and international overnight visitors to Tropical North Queensland in the year ended December 2010, a decline of 9% on the year ended December 2009.

IMPACT OF WEATHER EVENTS IN QUEENSLAND:

Significant flooding and cyclone events occurred in Queensland in late December 2010 and continued into 2011. The full impact of these events will not be seen in tourism data until year ended March 2011 data (published in June 2011). Many of Queensland's tourism regions were affected either directly or indirectly by these weather events.

Stats on Q are you subscribed?

To receive an email alert whenever new tourism figures are released email 'subscribe' to:

statsonq@tq.com.au

Tropical North Qld Regional Snapshot

Domestic visitation Year ended December 2010

Domestic visitors to TNQ

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	705,000	-15%	4,483,000	-2%	6.4	0.8
VFR	298,000	-16%	1,650,000	11%	5.5	1.3
Business	247,000	-9%	963,000	-15%	3.9	-0.3
Total[3]	1,282,000	-16%	7,418,000	-6%	5.8	0.6
Intrastate						
Holiday	361,000	-14%	1,492,000	-6%	4.1	0.3
VFR	193,000	-30%	830,000	-13%	4.3	0.8
Business	200,000	-8%	808,000	-1%	4.0	0.2
Total	769,000	-21%	3,229,000	-16%	4.2	0.3
Interstate						
Holiday	344,000	-15%	2,991,000	0%	8.7	1.3
VFR	105,000	28%	820,000	52%	7.8	1.3
Business	47,000	n/p	155,000	n/p	3.3	n/p
Total	514,000	-7%	4,189,000	4%	8.2	0.9

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
TNQ	2,055,000	14%	n/p	n/p
Queensland	34,705,000	10%	$3,717	16%
Australia	151,288,000	5%	$14,969	2%

Nationally, and in QLD the popularity of day trips continued to build momentum, with the comparative affordability of this form of travel a key factor.

Key domestic source markets to TNQ

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	606,000	-28%	2,291,000	-23%
Brisbane	163,000	25%	938,000	12%
Melbourne	130,000	-36%	1,016,000	-25%
Sydney	125,000	-8%	910,000	-1%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,582,000	5%	71,208,000	2%
NSW	23,066,000	2%	78,330,000	2%
Victoria	15,812,000	0%	49,406,000	0%
Rest of Aus	14,156,000	-1%	60,597,000	0%
Australia	67,402,000	2%	259,541,000	1%
Holiday visitors				
Queensland	7,046,000	-4%	35,189,000	-4%
NSW	10,300,000	2%	38,454,000	-2%
Victoria	7,426,000	1%	24,860,000	1%
Rest of Aus	6,340,000	2%	28,824,000	0%
Australia	30,022,000	0%	127,328,000	-1%

The appeal of outbound travel has not waned in 2010, with this further adding to the woes of domestic tourism in Australia. Clearly, consumers are seeing value for money in outbound travel, driven by low airfares and the appreciation of the $AUD against many currencies.

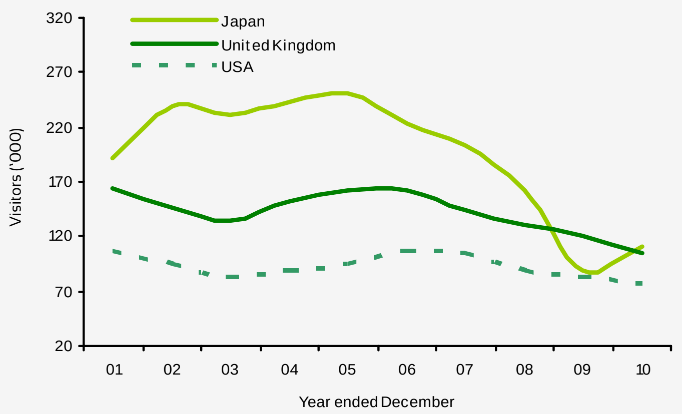
Tropical North Qld Regional Snapshot

International visitation Year ended December 2010

International visitors to TNQ

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	625,000	6%	4,605,000	-1%	7.4	-0.5
VFR	31,000	-3%	566,000	30%	18.0	4.4
Business	18,000	13%	94,000	4%	5.2	-0.5
Total[3]	686,000	5%	6,109,000	-2%	8.9	-0.7

Japanese, United Kingdom and American visitors to TNQ
YE December 01 - 10



Key international source markets to TNQ

Total visitors	Visitors	Annual % change	Nights	Annual % change
Japan	111,000	25%	814,000	41%
United Kingdom	105,000	-13%	1,091,000	-2%
United States	78,000	-6%	549,000	13%
China	72,000	76%	191,000	53%
Germany	52,000	8%	566,000	-13%

Holiday visitors	Visitors	Annual % change	Nights	Annual % change
Japan	104,000	27%	615,000	31%
United Kingdom	100,000	-14%	871,000	-10%
China	70,000	84%	176,000	64%
United States	67,000	-9%	396,000	12%
Germany	49,000	9%	455,000	-2%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,048,000	4%	39,800,000	2%
NSW	2,839,000	5%	65,225,000	6%
Victoria	1,649,000	8%	40,662,000	6%
Rest of Aus	1,366,000	1%	41,024,000	8%
Australia	5,390,000	5%	186,711,000	6%
Holiday visitors				
Queensland	1,440,000	2%	18,396,000	-6%
NSW	1,610,000	4%	21,098,000	5%
Victoria	793,000	3%	8,046,000	-1%
Rest of Aus	735,000	-3%	11,708,000	-2%
Australia	2,911,000	4%	59,247,000	-1%

Recovery in international visitation to Australia was led by a strong rebound in business long-haul travel, and boosted by an increase in air capacity on key source markets routes, particularly out of Asia.

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 Tropical North Queensland tourism region includes the Cardwell Shire (ABS Northern region) and Carpentaria, Mornington, Burke and Unincorporated Islands (which are part of the ABS Outback Tourism Region).

Tropical North Qld Regional Snapshot

Tourism Queensland

Year ended December 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,860,000	16%	15,233,000	16%	3.1	0.0	29%	35%	29%	29%
Gold Coast	3,396,000	6%	13,755,000	1%	4.1	-0.1	59%	29%	9%	20%
SEQC[4]	3,018,000	8%	9,379,000	7%	3.1	0.0	43%	40%	10%	18%
Sunshine Coast	2,604,000	-3%	10,186,000	-12%	3.9	-0.4	59%	31%	6%	16%
TNQ	**1,282,000**	**-16%**	**7,418,000**	**-6%**	**5.8**	**0.6**	**55%**	**23%**	**19%**	**8%**
Toowoomba	1,238,000	1%	3,548,000	-12%	2.9	-0.4	33%	40%	20%	7%
CQ	1,124,000	-1%	3,863,000	-13%	3.4	-0.5	34%	28%	32%	7%
Capricorn	842,000	0%	3,028,000	-11%	3.6	-0.4	32%	26%	35%	5%
Townsville	837,000	11%	3,066,000	2%	3.7	-0.3	28%	28%	31%	5%
Mackay	685,000	25%	2,741,000	38%	4.0	0.4	22%	28%	45%	4%
Bundaberg	591,000	15%	2,027,000	-5%	3.4	-0.7	30%	28%	28%	4%
Fraser Coast	514,000	-10%	2,104,000	-16%	4.1	-0.2	53%	31%	11%	3%
Whitsundays	501,000	24%	2,172,000	27%	4.3	0.1	70%	17%	11%	3%
Outback	370,000	n/p	1,849,000	n/p	5.0	n/p	34%	19%	42%	2%
Gladstone	343,000	7%	1,584,000	8%	4.6	0.1	46%	31%	20%	2%
Southern Downs	334,000	n/p	779,000	n/p	2.3	n/p	53%	35%	10%	2%
Western Downs	296,000	n/p	737,000	n/p	2.5	n/p	50%	23%	21%	2%
Total	16,582,000	5%	71,208,000	2%	4.3	-0.1	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	948,000	4%	16,422,000	6%	17.3	0.3	51%	30%	12%	46%
Gold Coast	817,000	0%	8,076,000	5%	9.9	0.4	78%	15%	5%	40%
TNQ	**686,000**	**5%**	**6,109,000**	**-2%**	**8.9**	**-0.7**	**91%**	**5%**	**3%**	**33%**
Sunshine Coast	283,000	2%	2,618,000	3%	9.2	0.0	80%	18%	2%	14%
Whitsundays	204,000	-9%	1,167,000	-11%	5.7	-0.2	97%	2%	1%	10%
Fraser Coast	169,000	-10%	671,000	-6%	4.0	0.2	96%	4%	1%	8%
Townsville	131,000	-8%	1,486,000	11%	11.3	1.9	79%	11%	5%	6%
CQ	125,000	-2%	875,000	-33%	7.0	-3.2	86%	10%	5%	6%
SEQC[4]	118,000	1%	2,120,000	2%	18.0	0.2	42%	47%	7%	6%
Capricorn	78,000	-5%	573,000	-29%	7.3	-2.5	83%	10%	4%	4%
Gladstone	63,000	3%	302,000	-40%	4.8	-3.4	90%	6%	3%	3%
Mackay	49,000	-9%	379,000	-23%	7.7	-1.4	78%	18%	4%	2%
Bundaberg	42,000	-16%	690,000	0%	16.5	2.6	79%	17%	0%	2%
Toowoomba	36,000	-10%	710,000	13%	19.8	3.9	47%	31%	11%	2%
Outback	24,000	n/p	249,000	n/p	10.6	n/p	75%	13%	8%	1%
Western Downs	12,000	n/p	157,000	n/p	13.5	n/p	58%	8%	8%	1%
Southern Downs	10,000	n/p	178,000	n/p	17.1	n/p	80%	20%	0%	0%
Total	2,048,000	4%	39,800,000	2%	19.4	-0.5	70%	24%	9%	-

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

1. Annual change refers to the percentage change between the year ended December 2010 vs. year ended December 2009.
2. Trend change refers to the percentage change between the 3 years to December 2009 vs. the 3 years to December 2010.
3. This figure includes "Other" visitors.
4. South East Queensland Country.

n/p not published.

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.