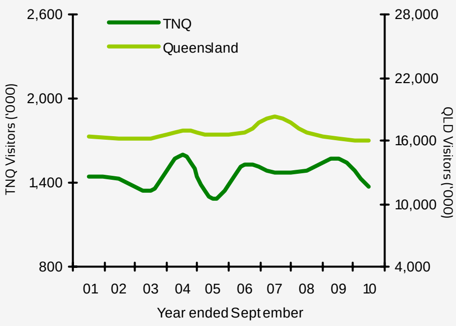
Tropical North Qld Regional Snapshot

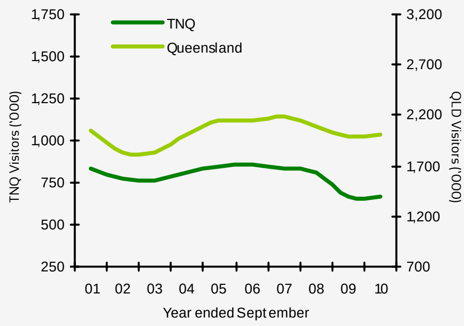
Year ended September 2010

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	1,366,000	781,000	309,000	236,000	$1,554
Annual change[1]	▼ -13%	▼ -8%	▼ -24%	▼ -6%	▼ -7%
Trend change[2]	▼ -2%	▼ -2%	▼ -4%	▼ -2%	▼ -1%
International overnight	672,000	612,000	28,000	18,000	$797
Annual change	▲ 1%	▲ 1%	▼ -20%	▲ 6%	▼ -13%
Trend change	▼ -7%	▼ -7%	▼ -7%	▼ -20%	▼ -9%
TOTAL	2,038,000	1,393,000	337,000	254,000	$2,351
Annual change	▼ -9%	▼ -4%	▼ -23%	▼ -5%	▼ -9%

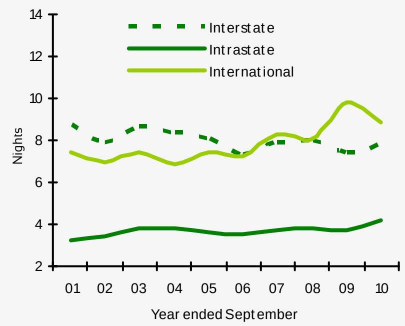
Domestic visitation



International visitation



Average length of stay (TNQ)

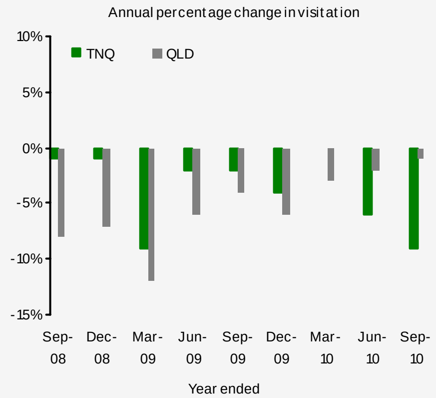


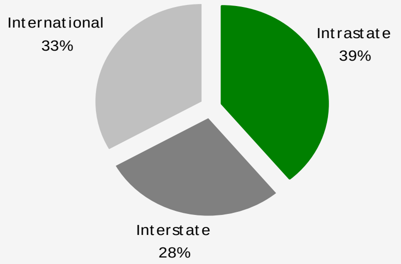
- Tropical North Queensland's (TNQ) domestic result was heavily impacted by the decline in the number of TNQ residents travelling within the region. High unemployment and economic concerns potentially hampering TNQ locals' propensity to travel domestically over the year.
- The Brisbane holiday market was stronger for the region (in contrast to what was seen by the state), perhaps stimulated by more affordable airfares and package deals.
- Family groups (parents and children) travelling from Brisbane and to a lesser extent from Sydney remained the more resilient and continued to travel to TNQ over the year.

- TNQ saw an increase in international visitation over the last year, a positive sign following periods of decline. Strong growth in visitation from China, and a recovery in the Japanese market, plus growth from a range of smaller European markets drove the results.
- Chinese visitation to the region rose by 76 percent, ultimately driving the recovery to TNQ overall. The number of Chinese visitors travelling as a group on a package tour doubled for TNQ in the past year.
- The recovery in the Japanese market is reflective of the additional air capacity.
- The European youth market (under 30 years old) softened, driven by the downturn in the United Kingdom (UK) market to Queensland overall.

- Interstate visitors travelling for a holiday stayed an average of 8 nights in the TNQ region, representing an upswing of approximately one night over the year.
- In contrast to the state trend, intrastate holiday visitors continued to increase their length of stay to average 4 nights.
- International visitors length of stay declined, driven by a decline in education visitor length of stay. Whilst, holiday visitors length of stay softened over the same period.
- Domestic expenditure declined to $1.6 billion driven by the downturn from the local market. The international visitor expenditure results reflect the decline in the UK market, as UK visitors are the regions' largest source of visitors and nights.

Total visitation





- There were **2,038,000** domestic and international overnight visitors to Tropical North Queensland in the year ended September 2010, a decline of 9% on the year ended September 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 visitation Year ended September 2010

Domestic visitors to TNQ

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	781,000	-8%	4,910,000	9%	6.3	1.0
VFR	309,000	-24%	1,592,000	1%	5.2	1.3
Business	236,000	-6%	881,000	-12%	3.7	-0.3
Total[3]	1,366,000	-13%	7,727,000	0%	5.7	0.8
Intrastate						
Holiday	379,000	-17%	1,604,000	-4%	4.2	0.6
VFR	213,000	-34%	957,000	-5%	4.5	1.4
Business	190,000	-11%	667,000	-15%	3.5	-0.2
Total	803,000	-25%	3,355,000	-16%	4.2	0.5
Interstate						
Holiday	401,000	4%	3,305,000	17%	8.2	0.9
VFR	96,000	19%	635,000	14%	6.6	-0.3
Business	46,000	21%	213,000	-4%	4.6	-1.2
Total	563,000	10%	4,372,000	16%	7.8	0.4

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
TNQ	1,919,000	3%	n/p	n/p
Queensland	33,815,000	8%	$3,676	17%
Australia	151,767,000	6%	$15,520	7%

The increased trend towards day trips continued, with the comparative affordability of this type of travel a key factor.

Key domestic source markets to TNQ

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	637,000	-32%	2,447,000	-23%
Melbourne	165,000	-6%	1,276,000	7%
Brisbane	165,000	24%	908,000	12%
Sydney	134,000	-6%	1,008,000	10%

State comparison - Domestic

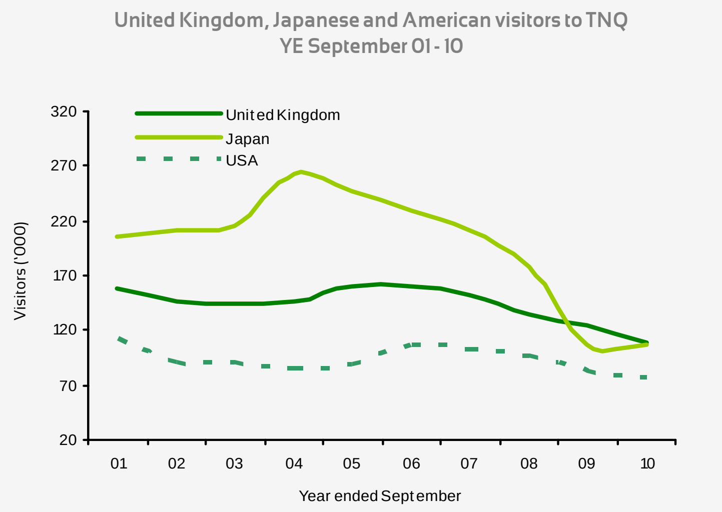
Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,960,000	-1%	70,526,000	1%
NSW	23,404,000	5%	79,719,000	4%
Victoria	15,693,000	-1%	49,976,000	1%
Rest of Aus	14,046,000	-3%	60,725,000	0%
Australia	66,834,000	1%	260,946,000	2%
Holiday visitors				
Queensland	6,969,000	-6%	34,469,000	-4%
NSW	10,420,000	3%	38,862,000	-1%
Victoria	7,341,000	-2%	24,998,000	0%
Rest of Aus	6,260,000	0%	28,635,000	0%
Australia	29,939,000	-1%	126,964,000	-1%

The business sector was the main driver for a small increase in domestic travel overall in Australia, with holiday travel easing slightly over the last year. Queensland and WA, both saw solid recovery in domestic business travel.

International visitation Year ended September 2010

International visitors to TNQ

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	612,000	1%	4,612,000	-2%	7.5	-0.3
VFR	28,000	-20%	516,000	3%	18.1	3.7
Business	18,000	6%	100,000	18%	5.6	0.6
Total[3]	672,000	1%	6,001,000	-8%	8.9	-0.9



Key international source markets to TNQ

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	108,000	-14%	1,101,000	-8%
Japan	106,000	-1%	802,000	33%
United States	77,000	-7%	501,000	-5%
China	60,000	76%	159,000	47%
Germany	49,000	-4%	546,000	-14%

Holiday visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	102,000	-15%	913,000	-8%
Japan	98,000	-1%	615,000	24%
United States	69,000	-7%	369,000	3%
China	58,000	81%	141,000	50%
Germany	47,000	-2%	420,000	-13%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,013,000	2%	39,008,000	-3%
NSW	2,835,000	7%	64,797,000	9%
Victoria	1,597,000	6%	40,403,000	7%
Rest of Aus	1,357,000	1%	40,186,000	7%
Australia	5,334,000	6%	184,395,000	6%
Holiday visitors				
Queensland	1,437,000	0%	18,079,000	-9%
NSW	1,604,000	6%	21,387,000	10%
Victoria	784,000	4%	8,656,000	9%
Rest of Aus	736,000	-2%	11,514,000	-4%
Australia	2,888,000	4%	59,636,000	1%

The return in international business travel was more prominent for NSW and VIC due to their large international business markets, subsequently fuelling the growth in international visitation seen to these states and Australia overall. While Queensland saw a more modest business recovery, the international holiday market continued to pick up.

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).

Year ended September 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,306,000	-8%	14,127,000	-3%	3.3	0.2	27%	39%	27%	27%
Gold Coast	3,330,000	4%	13,372,000	-3%	4.0	-0.3	61%	27%	9%	21%
Sunshine Coast	2,539,000	-1%	10,366,000	-4%	4.1	-0.1	61%	30%	5%	16%
SEQC	2,447,000	4%	7,141,000	9%	2.9	0.1	38%	45%	11%	15%
TNQ	**1,366,000**	**-13%**	**7,727,000**	**0%**	**5.7**	**0.8**	**57%**	**23%**	**17%**	**9%**
Toowoomba	1,280,000	7%	4,069,000	15%	3.2	0.2	32%	43%	19%	8%
CQ	1,092,000	0%	3,964,000	-1%	3.6	-0.1	33%	32%	29%	7%
Capricorn	833,000	3%	3,264,000	6%	3.9	0.1	34%	28%	30%	5%
Townsville	815,000	1%	2,858,000	-17%	3.5	-0.7	28%	26%	33%	5%
Mackay	676,000	22%	2,700,000	28%	4.0	0.2	21%	25%	48%	4%
Bundaberg	554,000	8%	2,182,000	15%	3.9	0.2	35%	29%	21%	3%
Fraser Coast	546,000	-13%	2,119,000	-24%	3.9	-0.5	52%	29%	13%	3%
Whitsundays	498,000	20%	2,270,000	23%	4.6	0.1	71%	14%	11%	3%
Southern Downs	357,000	n/p	761,000	n/p	2.1	n/p	50%	33%	15%	2%
Outback	345,000	n/p	1,956,000	n/p	5.7	n/p	36%	21%	34%	2%
Gladstone	319,000	8%	1,046,000	-17%	3.3	-1.0	38%	38%	20%	2%
Western Downs	314,000	n/p	862,000	n/p	2.7	n/p	43%	29%	20%	2%
Total	15,960,000	-1%	70,526,000	1%	4.4	0.1	44%	32%	20%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	914,000	0%	16,012,000	-1%	17.5	-0.2	53%	29%	12%	45%
Gold Coast	842,000	6%	8,057,000	3%	9.6	-0.3	79%	15%	5%	42%
TNQ	**672,000**	**1%**	**6,001,000**	**-8%**	**8.9**	**-0.9**	**91%**	**4%**	**3%**	**33%**
Sunshine Coast	282,000	0%	2,479,000	-4%	8.8	-0.3	79%	18%	2%	14%
Whitsundays	208,000	-7%	1,215,000	-6%	5.8	0.0	96%	2%	1%	10%
Fraser Coast	178,000	-4%	738,000	2%	4.2	0.3	94%	5%	1%	9%
Townsville	132,000	-10%	1,451,000	9%	11.0	1.9	81%	11%	5%	7%
CQ	122,000	-5%	929,000	-19%	7.6	-1.3	87%	9%	3%	6%
SEQC	121,000	2%	1,976,000	-13%	16.4	-2.8	41%	49%	7%	6%
Capricorn	75,000	-11%	528,000	-30%	7.0	-2.0	85%	11%	4%	4%
Gladstone	62,000	2%	401,000	3%	6.5	0.1	90%	6%	3%	3%
Mackay	51,000	-6%	403,000	-11%	7.9	-0.5	76%	20%	4%	3%
Bundaberg	41,000	-20%	653,000	5%	15.9	3.6	80%	17%	0%	2%
Toowoomba	37,000	-8%	642,000	-10%	17.2	-0.5	49%	32%	11%	2%
Outback	26,000	n/p	282,000	n/p	10.7	n/p	85%	8%	4%	1%
Southern Downs	11,000	n/p	147,000	n/p	13.4	n/p	73%	18%	0%	1%
Western Downs	11,000	n/p	133,000	n/p	11.9	n/p	64%	9%	9%	1%
Total	2,013,000	2%	39,008,000	-3%	19.4	-0.8	71%	24%	8%	-

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

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

n/p not published.