Tropical North Qld Regional Snapshot

Year ended March 2011

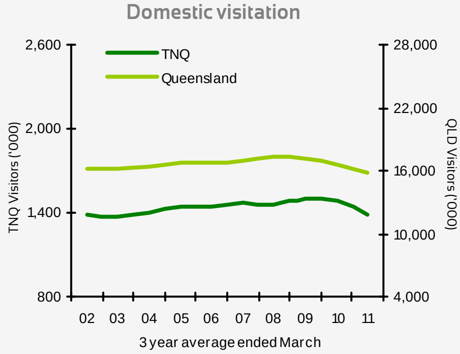
IMPORTANT MESSAGE:

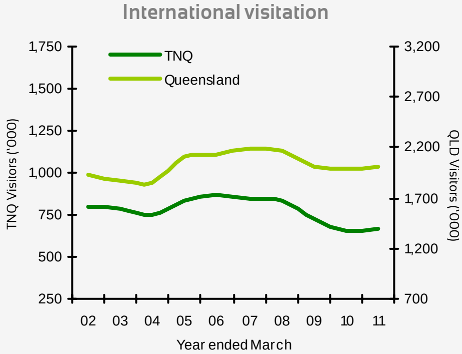
Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, domestic data for tourism regions will be presented 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.

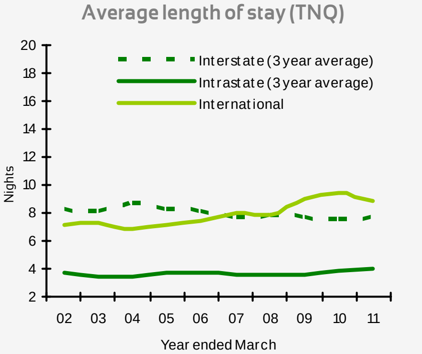
National and state level NVS data will be published as normal on a year ended basis.

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	Expenditure ($m)
Domestic overnight 3 year average	1,384,000	758,000	333,000	239,000	$1,506
Trend change[1]	▼ -7%	▼ -7%	▼ -9%	▼ -6%	▼ -4%
International overnight	661,000	600,000	32,000	18,000	$755
Annual change[2]	● 0%	● 0%	● 0%	▲ 6%	▼ -7%
Trend change	▼ -8%	▼ -8%	▼ -3%	▼ -21%	▼ -10%



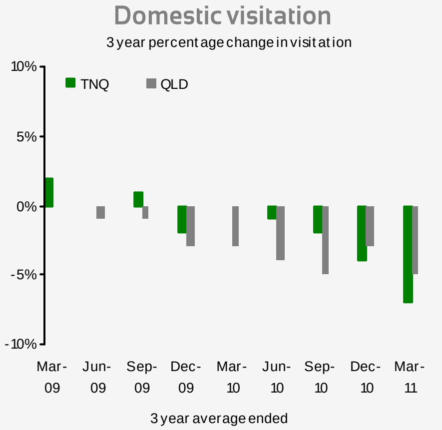




- While over the long-term TNQ has had growth, the past three years has seen declines in domestic visitors, resulting in an overall decline in expenditure in TNQ.
- TNQ had declines in travel from regional QLD, attributable to restricted intrastate travel associated with flooding and cyclones that occurred in the 2010/2011 summer. Reflecting this, travel by car to TNQ declined substantially.
- The number of travellers aged 65 or over travelling to TNQ increased, particularly older people visiting friends and relatives.
- Over the three years there was an increase in business travellers from Brisbane visiting TNQ, but a decline in the number of couples.
- Sydney and Melbourne recorded declines over the three years to March 2011.

- TNQ's international market was flat in the year ended March 2011, affected by cyclones and weak UK and European markets.
- TNQ had increases in Chinese and Japanese holiday visitors travelling on package tours. While the past year has seen a rebound in Japanese visitors to TNQ, this growth softened following the earthquake.
- Increasing air capacity has resulted in a boost to the number of New Zealand (NZ) couples holidaying in TNQ over the year.
- Visitors from the United Kingdom (UK) declined, the result of economic uncertainty in the UK and severe weather events limiting access to many Queensland destinations.
- Youth visitors (under 30 years old) from the UK and Europe declined, but this was offset by growth in older Chinese visitors.

- TNQ saw an increase in average length of stay from both intrastate and interstate visitors. This was mainly driven by business visitors increasing their stay in the region.
- Domestic expenditure declined by 4%, as a result of the decline in visitation.
- International visitors' length of stay shortened, with holiday, business and education visitors average stay declining. However, VFR had a strong increase in length of stay.
- International expenditure fell 7% due to the large decline in the number of nights, particularly by education and holiday visitors. The increase in nights by the shorter staying NZ and Asian markets, could not offset the decline in longer staying UK and European markets, particularly youth visitors.



Domestic visitation to TNQ has continued to decline, reflecting trends in the Queensland average.

TNQ's international market was flat in the year ending March 2011, with previous increases being offset by the impact of Cyclone Yasi, the earthquake in Japan and the European down-turn.

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Tropical North Qld Regional Snapshot

Domestic visitation

Domestic visitors to TNQ 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	758,000	-7%	4,321,000	-7%	5.7	0.0
VFR	333,000	-9%	1,606,000	-6%	4.8	0.1
Business	239,000	-6%	996,000	11%	4.2	0.6
Total[3]	1,384,000	-7%	7,393,000	-4%	5.3	0.2
Intrastate						
Holiday	393,000	-8%	1,515,000	-10%	3.9	-0.1
VFR	250,000	-12%	972,000	-11%	3.9	0.0
Business	187,000	-4%	701,000	21%	3.7	0.8
Total	869,000	-9%	3,436,000	-5%	4.0	0.2
Interstate						
Holiday	365,000	-6%	2,807,000	-5%	7.7	0.0
VFR	83,000	2%	634,000	4%	7.6	0.1
Business	52,000	-15%	296,000	-7%	5.7	0.5
Total	515,000	-4%	3,957,000	-4%	7.7	0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
TNQ[4]	1,969,000	-1%	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 TNQ 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Regional Qld	714,000	-11%	2,589,000	-9%
Melbourne	160,000	-1%	1,161,000	-4%
Brisbane	155,000	1%	847,000	10%
Sydney	133,000	-17%	860,000	-16%

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.

Tropical North Qld Regional Snapshot

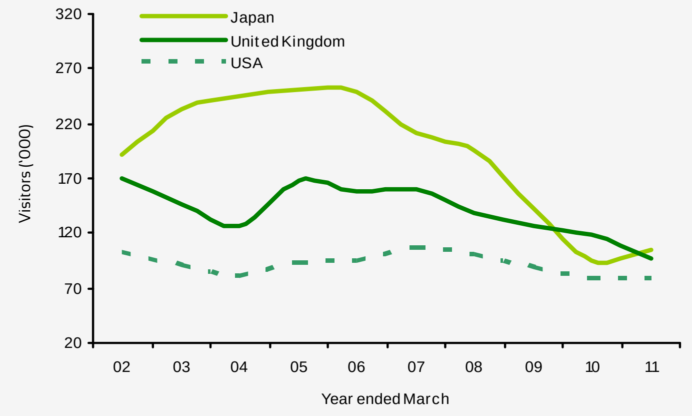
Tourism Queensland

International visitation Year ended March 2011

International visitors to TNQ

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	600,000	0%	4,347,000	-9%	7.2	-0.8
VFR	32,000	0%	594,000	41%	18.5	5.4
Business	18,000	6%	95,000	-3%	5.3	-0.6
Total[3]	661,000	0%	5,830,000	-7%	8.8	-0.7

Japanese, United Kingdom and American visitors to TNQ
YE March 02-11



Key international source markets to TNQ

Total visitors	Visitors	Annual % change	Nights	Annual % change
Japan	105,000	11%	669,000	-2%
United Kingdom	96,000	-19%	1,027,000	-10%
United States	79,000	0%	530,000	9%
China	74,000	57%	198,000	56%
Germany	49,000	-2%	604,000	-8%

Holiday visitors	Visitors	Annual % change	Nights	Annual % change
Japan	98,000	11%	533,000	0%
United Kingdom	90,000	-21%	797,000	-21%
China	73,000	66%	186,000	74%
United States	68,000	-4%	410,000	17%
Germany	46,000	-4%	446,000	-10%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
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[5]	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[5]	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

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).

Regional visitation

Domestic Regional Comparison (3 year average to March 2011)

	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 (Year ended March 2011)

	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. This figure includes "Other" visitors.
4. 3 year average ended March 2011.
5. Excludes Transit visitors who did not have a stopover place.

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.