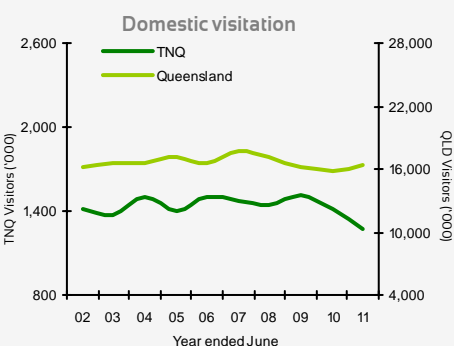


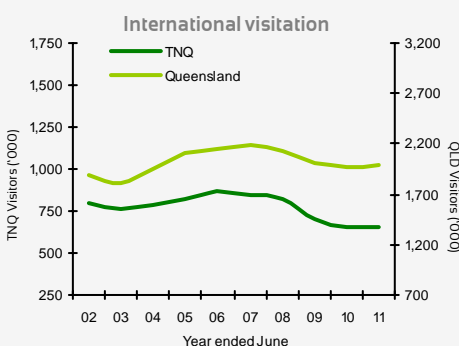
Year ended June 2011



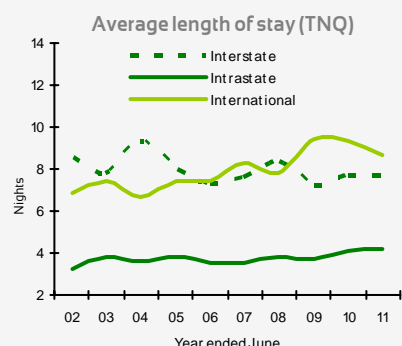
	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic overnight	1,266,000	700,000	242,000	271,000	\$1,439
Annual change ¹	▼ -10%	▼ -10%	▼ -36%	▲ 20%	▼ -13%
Trend change ²	▼ -4%	▼ -4%	▼ -11%	● 0%	▼ -2%
International overnight	649,000	588,000	33,000	18,000	\$762
Annual change	▼ -1%	▼ -1%	▲ 14%	▲ 13%	▼ -2%
Trend change	▼ -8%	▼ -8%	▼ -4%	▼ -14%	▼ -10%
TOTAL	1,915,000	1,288,000	275,000	289,000	\$2,201
Annual change	▼ -7%	▼ -6%	▼ -33%	▲ 19%	▼ -9%



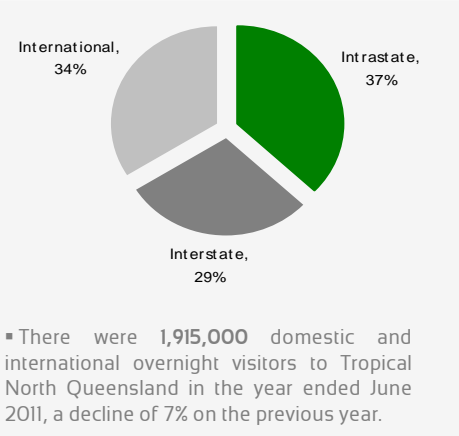
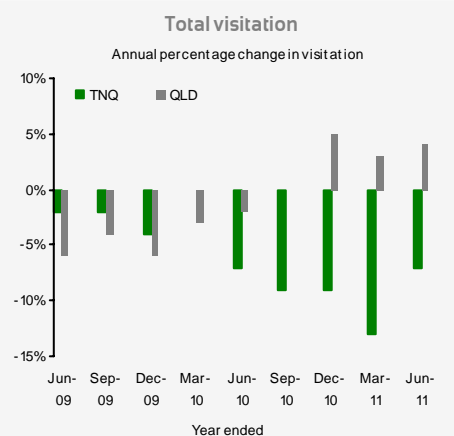
- Domestic visitation to TNQ declined, driven by regional QLD residents reducing their travel to the region.
- The drive market to TNQ declined in the year ending June 2011, owing to reduced access to the region during the 2010/2011 QLD floods and cyclones.
- TNQ saw a decline in holiday visitation from both intrastate and interstate markets. Visitation to TNQ from Sydney and Melbourne residents declined, reflecting a trend seen at the state level. Offsetting some of these declines was a recovery in holiday travel by locals within the region.
- There was also an increase in Brisbane business travellers to TNQ, suggesting that the region may be benefiting from a rebuilding phase.



- TNQ had a relatively stable performance in international visitation. This result was positive when compared to declines recorded by other regions in QLD.
- Holiday visitors to TNQ represent 91% of the international market. This market declined slightly in the year ending June 2011. Despite this there was growth in VFR and business travel to the region.
- The growth in international visitors was due to strong increases from China and modest growth from Japan and New Zealand. These increases offset some of the declines from the United Kingdom (UK) and Europe.
- The modest growth from Japan was positive when many regions in QLD recorded declines following the March earthquake. However, the previous growth achieved by TNQ from Japan has slowed.



- International visitors decreased their average stay in TNQ in the year ending June 2011 (down 0.6 nights). This was primarily due to a number of Asian markets reducing their average length of stay in the region.
- Domestic visitors increased their average stay in TNQ, driven by business and VFR. Both the interstate and intrastate holiday markets increased their average stay in TNQ.
- Intrastate visitors have been increasing their average stay in TNQ over the past 5 years and now stay 4.2 nights on average. Interstate visitors stay 7.7 nights, while International visitors average 8.7 nights.
- While visitor expenditure declined, this was associated with the 2010/2011 QLD floods and cyclones. However, the June quarter results revealed a recovery in visitor spend.



Stats on Q are you subscribed?
 To receive an email alert whenever new tourism figures are released email 'subscribe' to:
statsonq@tq.com.au

Domestic visitation Year ended June 2011

Domestic visitors to TNQ

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	700,000	-10%	4,371,000	-4%	6.2	0.3
VFR	242,000	-36%	1,374,000	-28%	5.7	0.7
Business	271,000	20%	1,162,000	n/p	4.3	1.0
Total³	1,266,000	-10%	7,270,000	-6%	5.7	0.2
Intrastate						
Holiday	338,000	-12%	1,423,000	-3%	4.2	0.4
VFR	138,000	n/p	583,000	n/p	4.2	0.0
Business	216,000	27%	923,000	n/p	4.3	1.4
Total	717,000	-17%	3,035,000	-15%	4.2	0.1
Interstate						
Holiday	362,000	-10%	2,948,000	-5%	8.1	0.3
VFR	104,000	20%	791,000	21%	7.6	0.1
Business	55,000	-4%	239,000	-7%	4.4	-0.1
Total	549,000	1%	4,235,000	1%	7.7	0.0

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
TNQ	1,830,000	-10%	\$245	-2%
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 TNQ

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	528,000	-27%	1,935,000	-27%
Brisbane	188,000	35%	1,101,000	18%
Melbourne	146,000	-24%	1,105,000	-14%
Sydney	127,000	-4%	806,000	-19%

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.

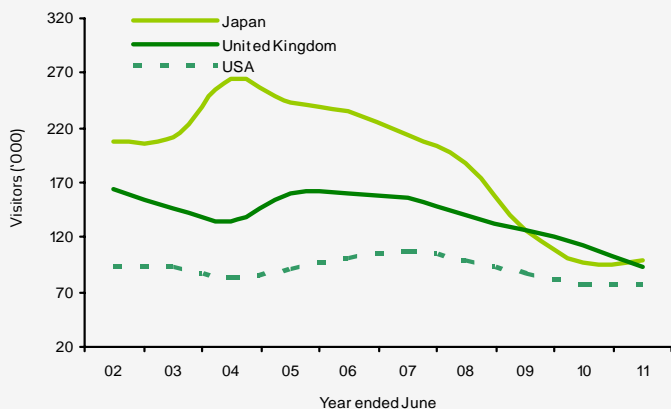


International visitation Year ended June 2011

International visitors to TNQ

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	588,000	-1%	4,260,000	-9%	7.2	-0.6
VFR	33,000	14%	561,000	19%	17.2	1.1
Business	18,000	13%	98,000	8%	5.5	-0.2
Total³	649,000	-1%	5,663,000	-7%	8.7	-0.6

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



Key international source markets to TNQ

Total visitors	Visitors	Annual % change	Nights	Annual % change
Japan	98,000	1%	623,000	-11%
United Kingdom	93,000	-18%	940,000	-16%
United States	77,000	0%	518,000	11%
China	74,000	37%	191,000	28%
Germany	48,000	-2%	610,000	-7%

Holiday visitors	Visitors	Annual % change	Nights	Annual % change
Japan	92,000	1%	507,000	-8%
United Kingdom	87,000	-19%	758,000	-21%
China	72,000	41%	184,000	50%
United States	66,000	-3%	386,000	11%
Germany	46,000	-2%	447,000	-9%

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	Visitors	Annual % change	Nights	Annual % change
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

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).

Disclaimer: By using this information you acknowledge that this information is provided by Tourism Queensland (TQ) to you without any responsibility on behalf of TQ. You agree to release and indemnify TQ for any loss or damage that you may suffer as a result of your reliance on this information. TQ does not represent or warrant that this information is correct, complete or suitable for the purpose for which you wish to use it. The information is provided to you on the basis that you will use your own skill and judgement and make your own enquiries to independently evaluate, assess and verify the information's correctness, completeness and usefulness to you before you rely on the information.

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. This figure includes "Other" visitors.

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.