

WELCOME TO CONVERSATIONS WITH INDUSTRY



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MANAGER, MARKET ANALYSIS

RESEARCH, ECONOMICS AND INSIGHTS



HOUSEKEEPING

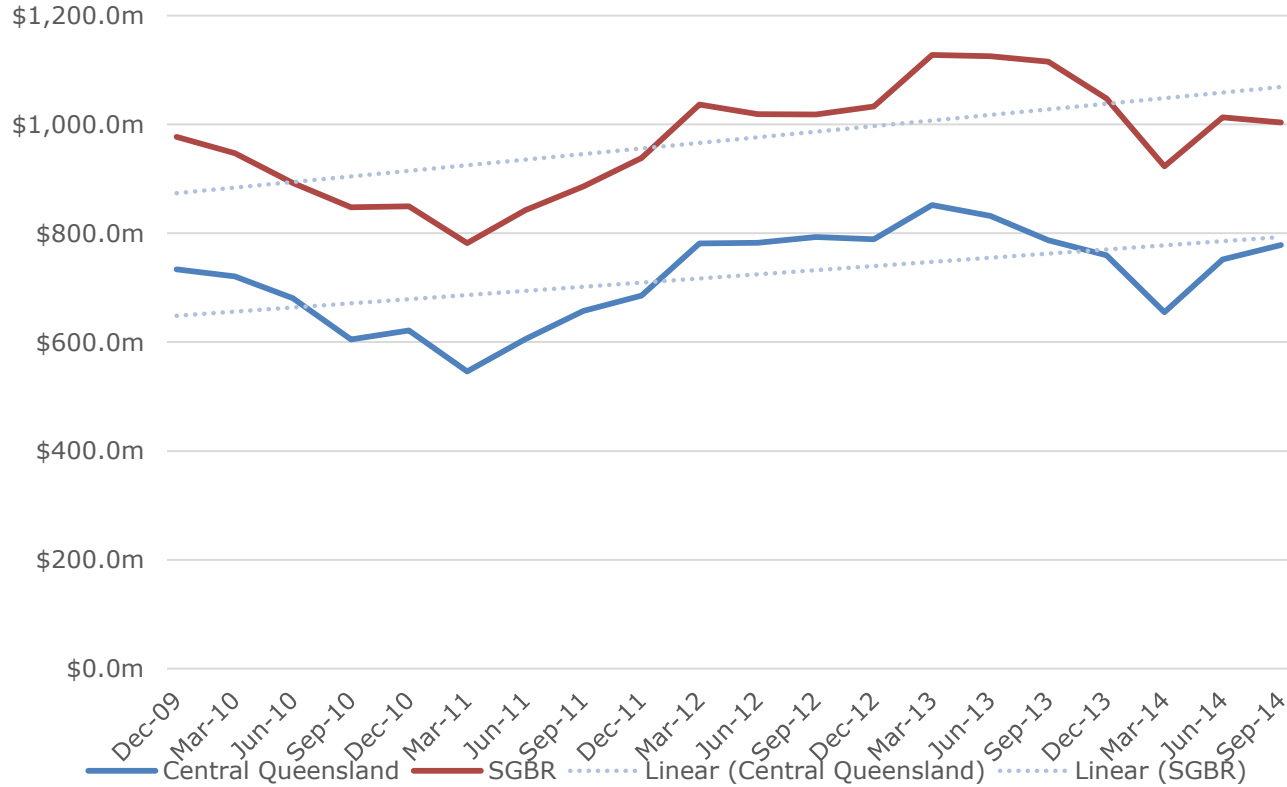
Contents

- ▶ Expenditure
- ▶ Visitation (source markets, purpose of travel, visitor lifecycle, activities etc)
- ▶ Seasonality
- ▶ Consumer Insights

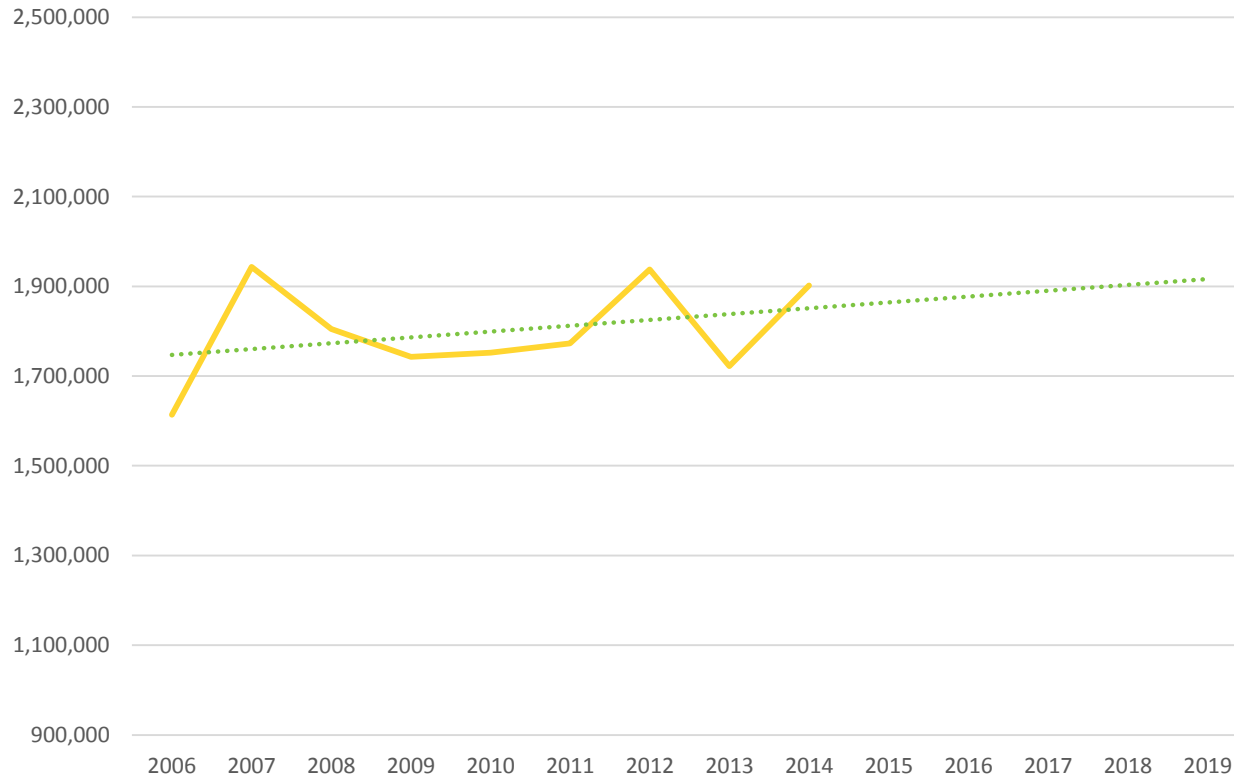
Sources

- ▶ National Visitor Survey
- ▶ International Visitor Survey
- ▶ Consumer Insights Focus Groups
- ▶ Sample Size issues addressed where possible

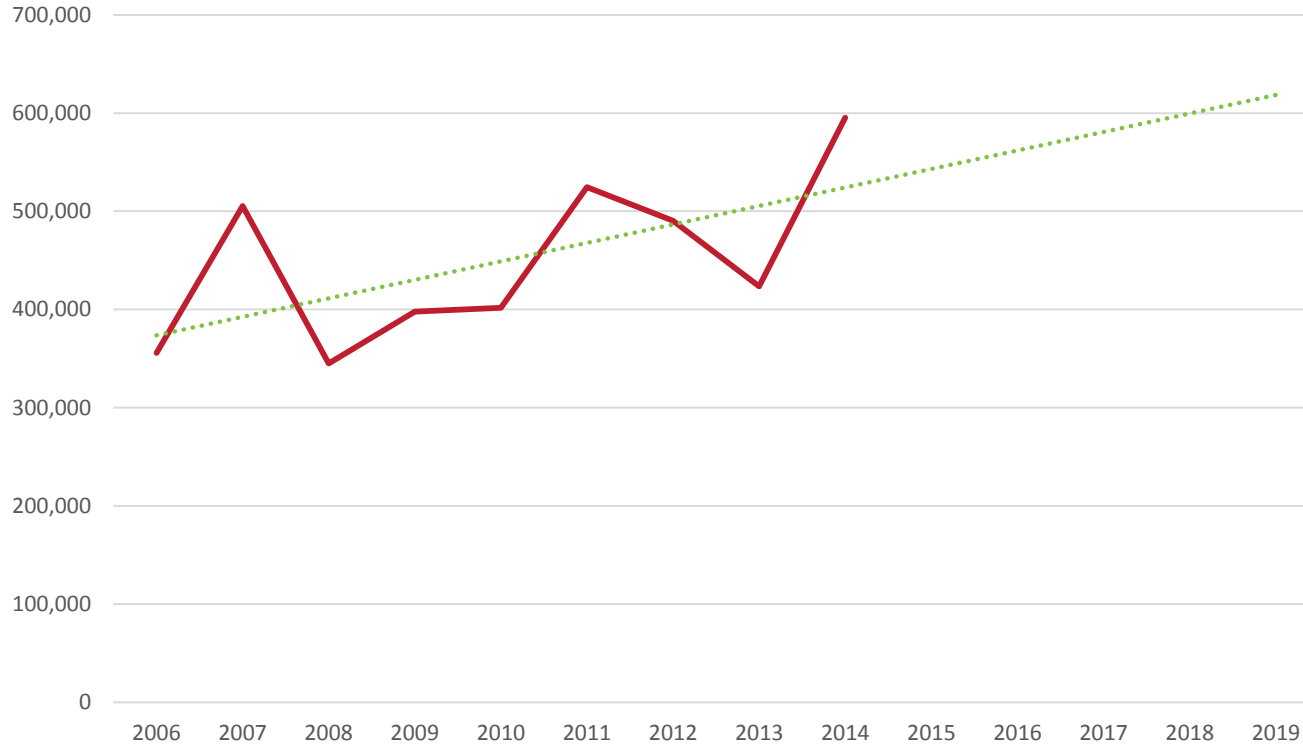
OVERNIGHT VISITOR EXPENDITURE CENTRAL QUEENSLAND



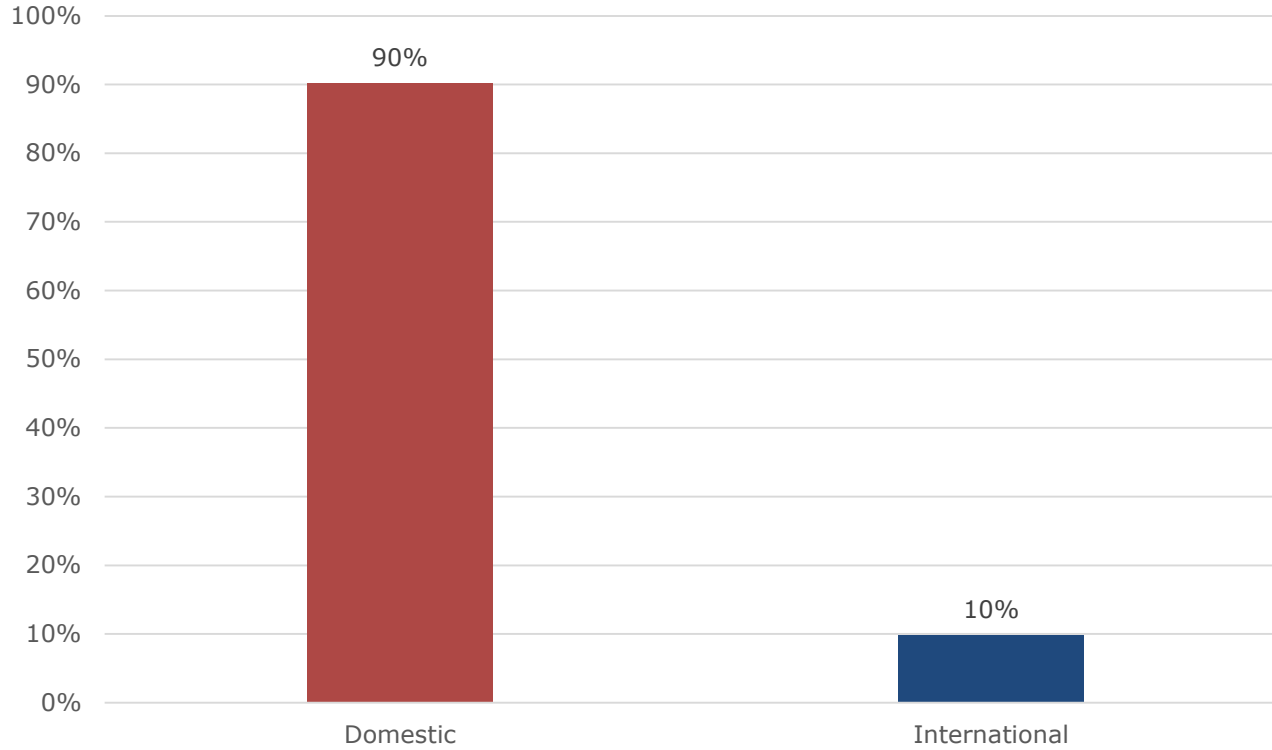
SGBR VISITATION TRENDS



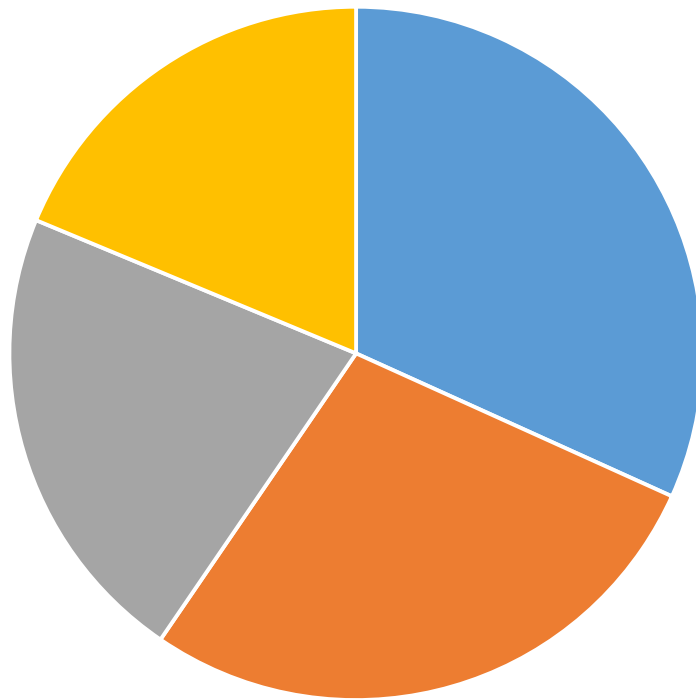
GLADSTONE REGION VISITATION TRENDS



ORIGIN – GLADSTONE REGION

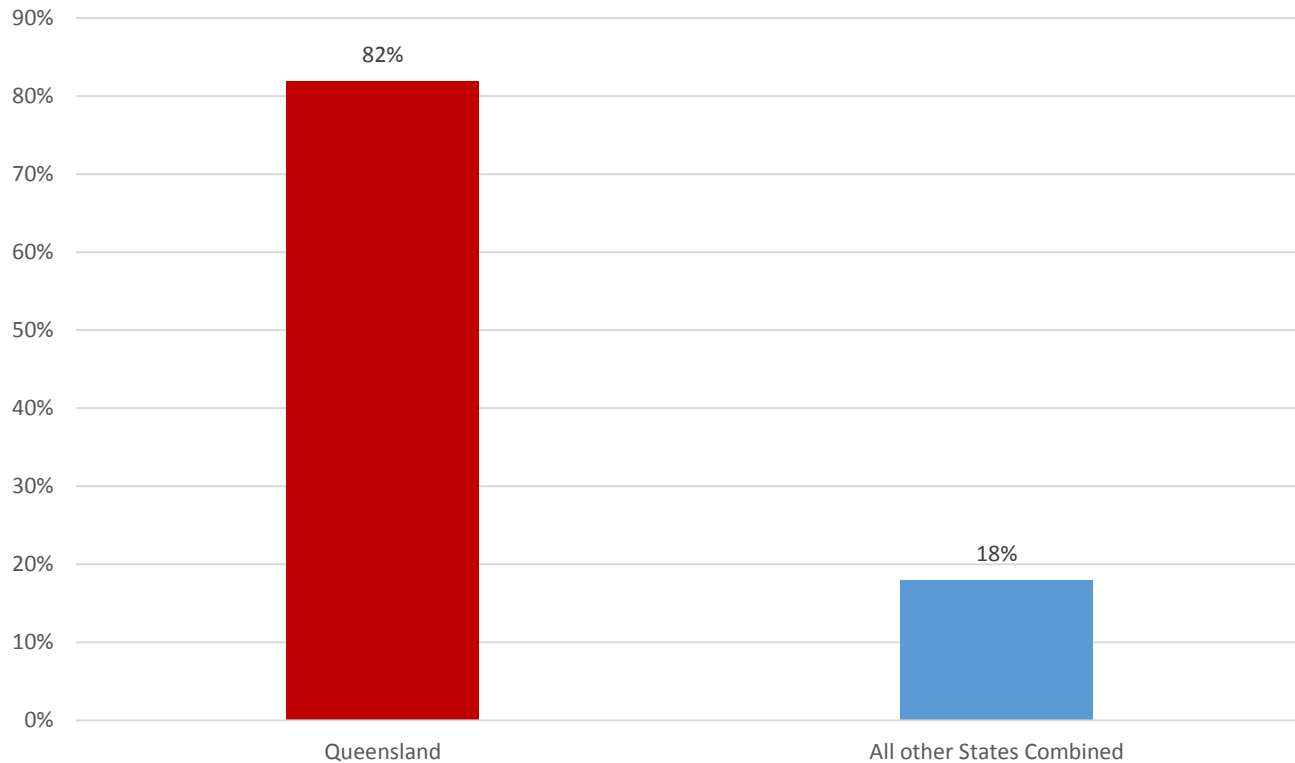


INTERNATIONAL SOURCE MARKETS TO THE GLADSTONE REGION

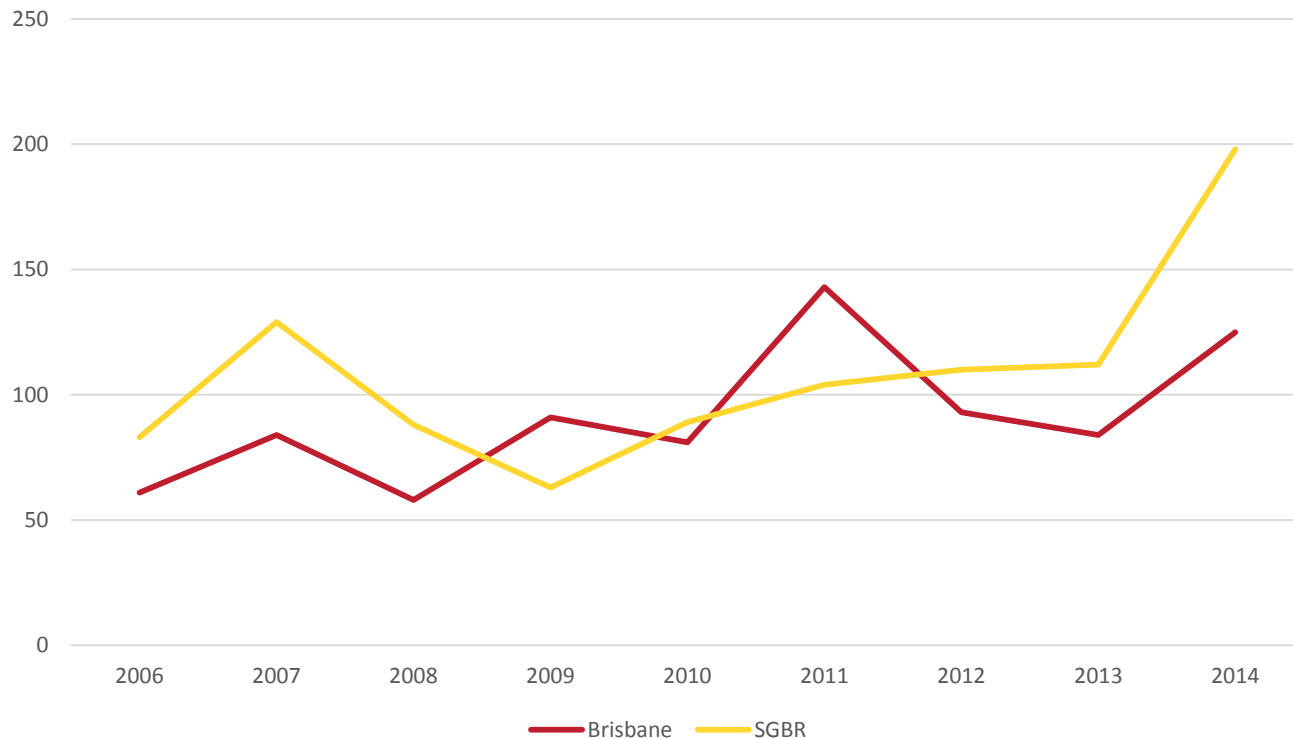


■ UK ■ Germany ■ New Zealand ■ Nth America ■

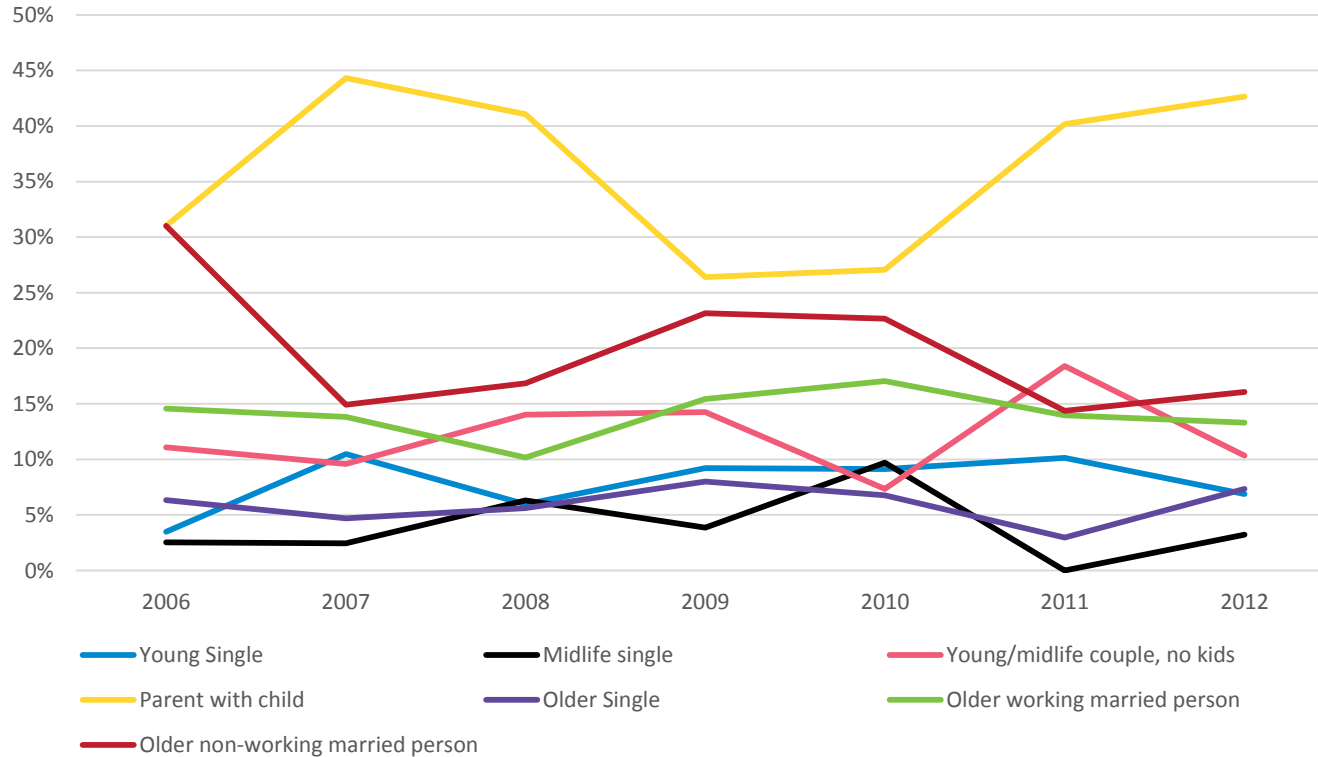
ORIGIN OF DOMESTIC VISITORS TO THE GLADSTONE REGION



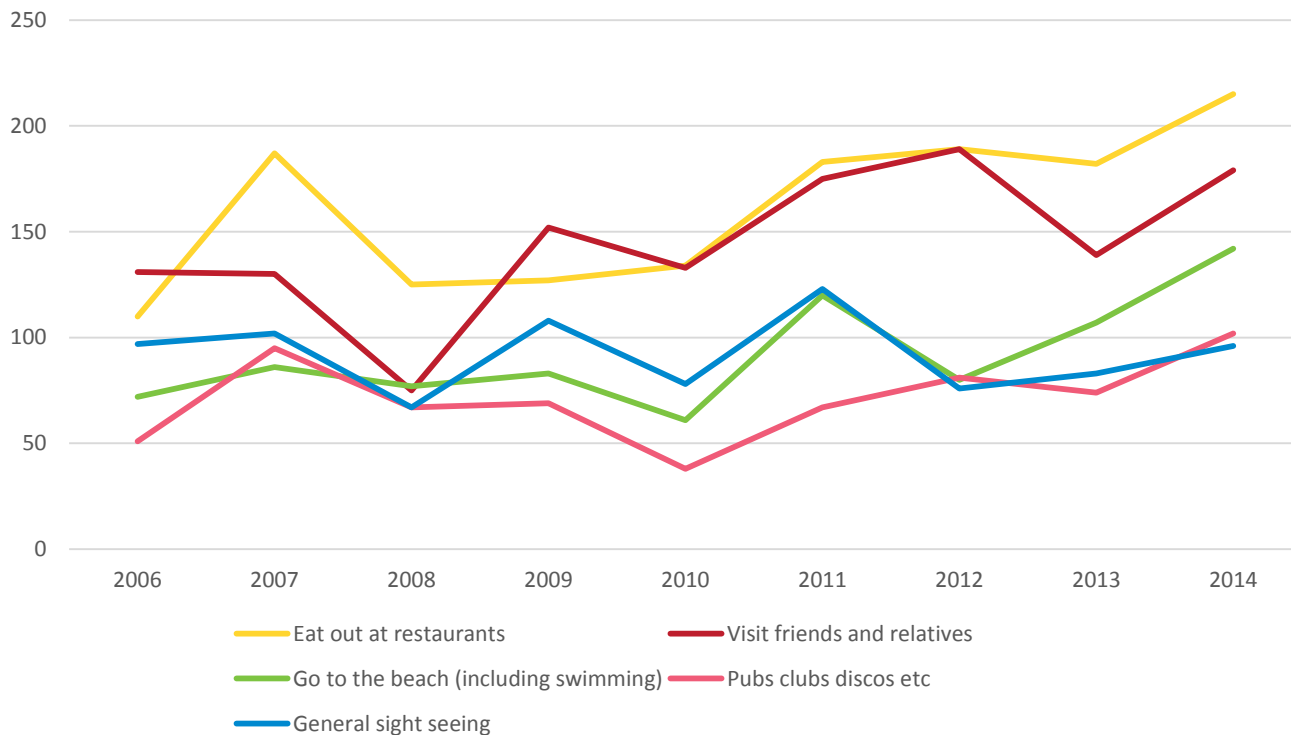
DOMESTIC SOURCE MARKETS TO THE GLADSTONE REGION



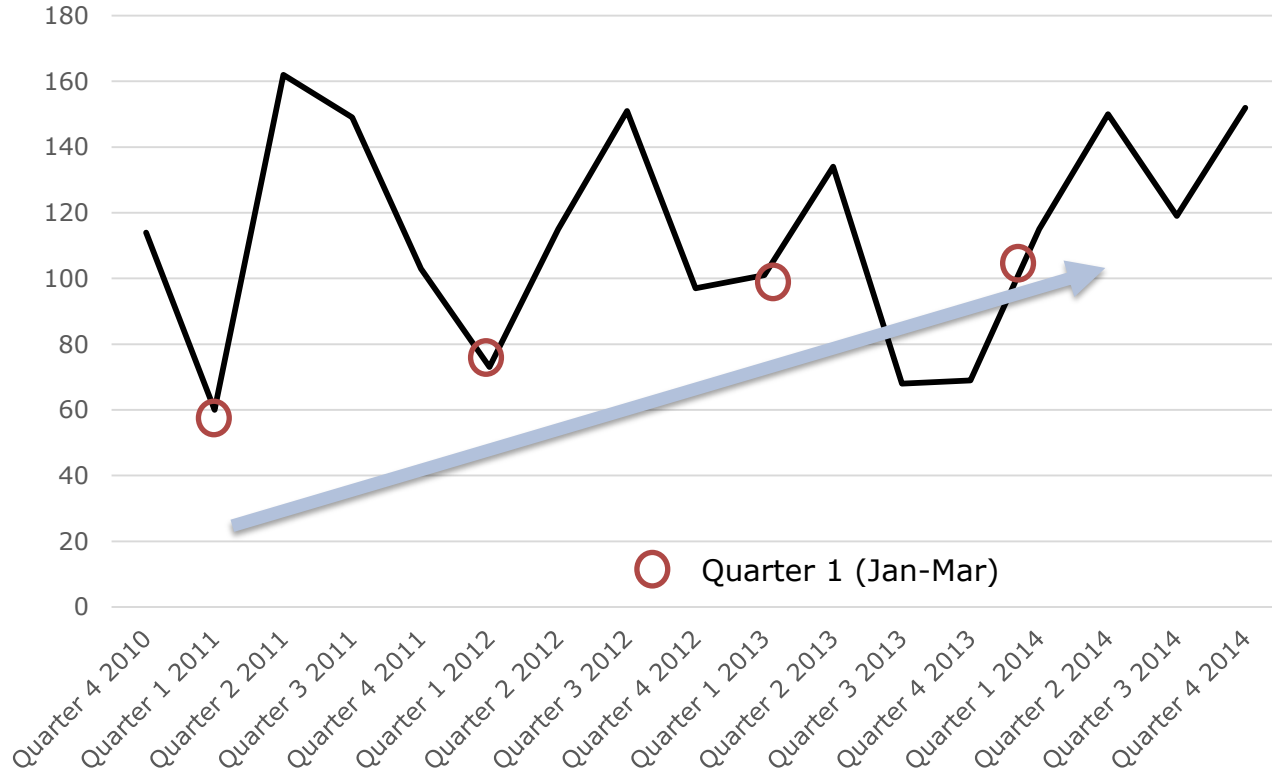
LIFECYCLE SHARE TO THE GLADSTONE REGION



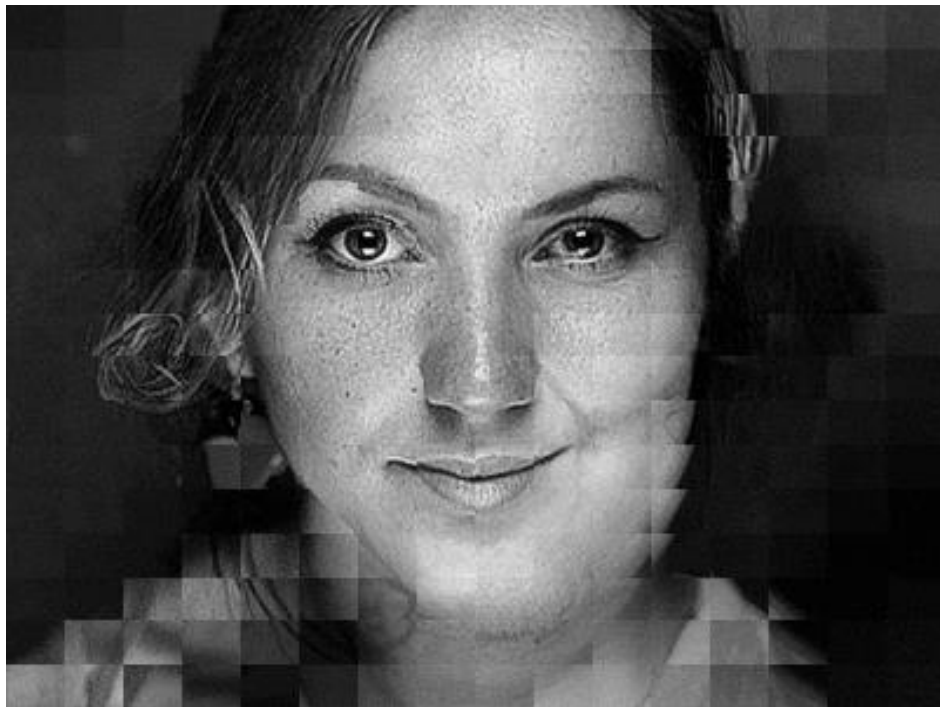
ACTIVITIES UNDERTAKEN IN THE GLADSTONE REGION



SEASONALITY TO THE GLADSTONE REGION ('000)



CONSUMER INSIGHTS



REJOVENATION



The place to come to feel your entire body and mind slowing down



A few refreshing days that will stick with you forever



Because we all need a change in pace now and then

Step away from the every day and a step into relaxation that is complete and refreshing. Whether it's a spa or discovering the secrets of the rainforest that rejuvenates you, Queensland offers you the perfect restorative escape

Get the most of your time here by completely relaxing and ensure the memory of your trip will stay with you forever. ...and all this is easily accessible at your doorstep. No need to think about it. Just pack up and go

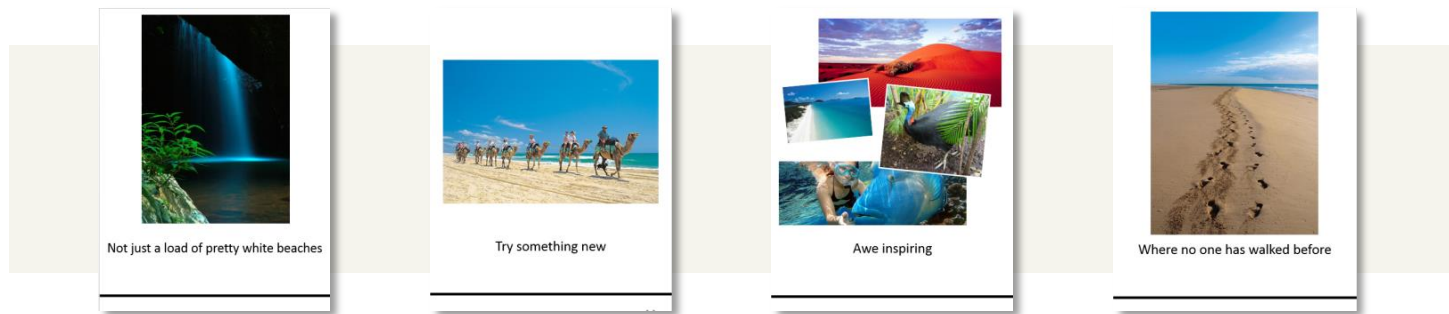
- Builds upon Queensland's existing credentials
- Potential to highlight multiple destinations
- Offers the potential to reposition longer haul travel as hard work
- Showcase variety by featuring the state's most relaxing destinations



***"Come
away
energised
and
revitalised"***



AUTHENTICITY



Discover the hidden '*real Queensland*'. Experience something you may not expect. Create your own holiday story by discovering natural wonders--reef, rainforest, animals and incredible produce. The opposite of a touristy packaged holiday

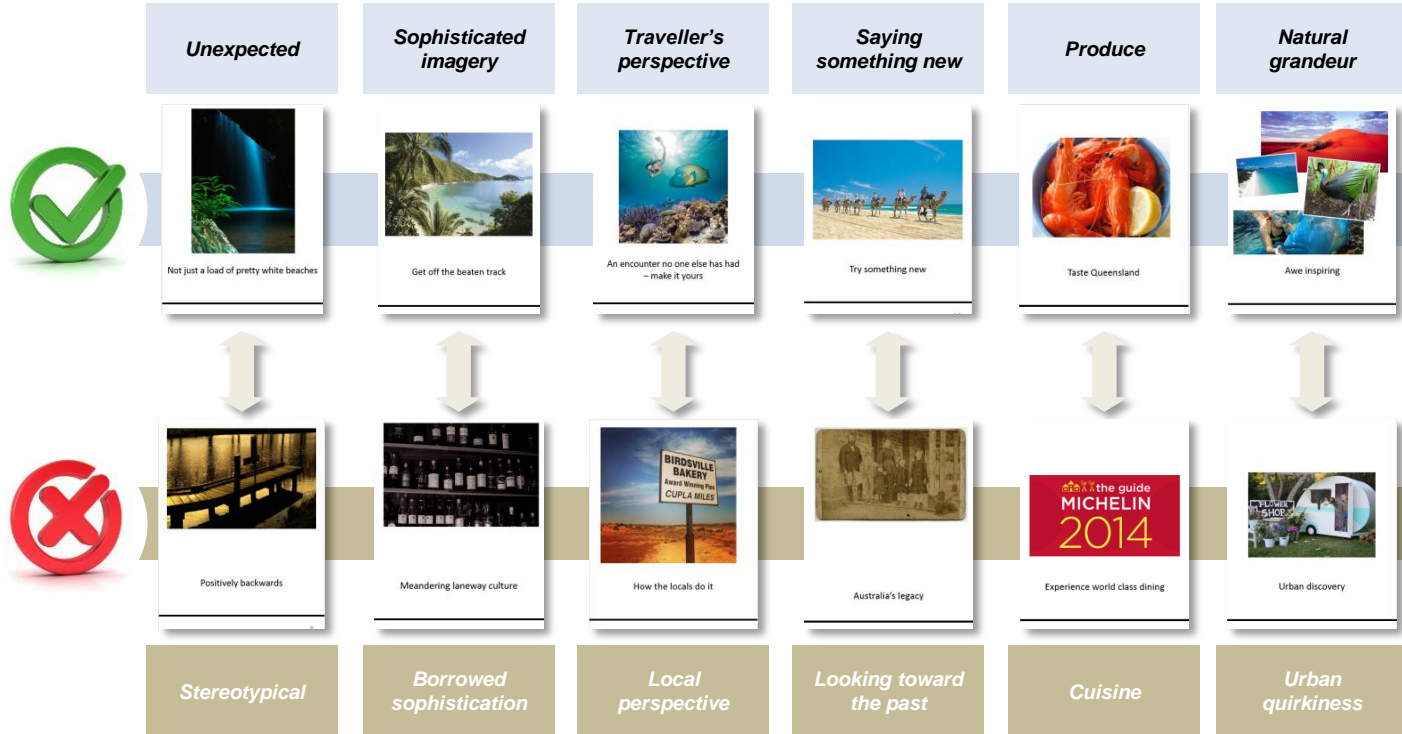
- Unique, genuine relevant experiences are a key driver of Real Holiday
- Highlight experiences across multiple destinations
- Challenges familiarity
- Ensures bragging rights
- Can showcase a range of activities

***"It's
about
making your
own
memories,
getting off
the touristy
track"***

Fiftyfive5
Creates opportunities for growth

EXECUTIONAL GUIDANCE

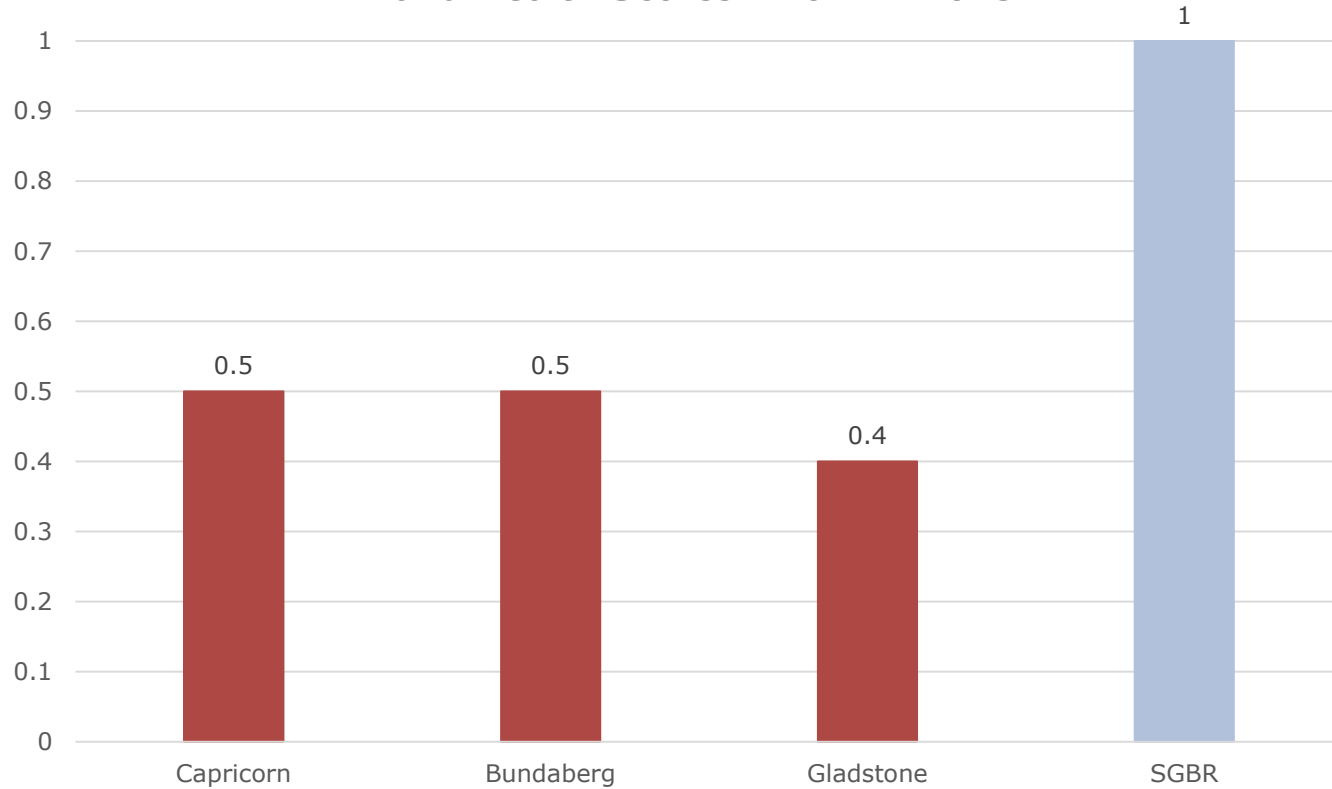
THE CONSUMER VIEW



Southern Great Barrier Reef
Brand Health Check 2013

BRAND HEALTH

Brand Health Scores - 2012 v 2013



QUESTIONS AT THE TABLE PLEASE

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Tourism and Events
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