

09

## TNQ Region in Figures | 2009

Cairns and Tropical North Queensland Statistical Overview





These statistics and other key information on Tropical North Queensland are available online at

[www.thinktnq.com.au](http://www.thinktnq.com.au)



Think TNQ is an initiative of Advance Cairns

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**TNQ REGION IN FIGURES**  
**Cairns and Tropical North Queensland**  
**Statistical Overview**  
**August 2009**

# **Geographical Background**

# Cairns – Australia's North Eastern Gateway/Aviation Hub



# Cairns – Capital of Tropical North Queensland (Peninsula Australia)



## Cairns & South East Corner of Tropical North Queensland Region





## Location & Distances

<b><u>Location</u></b>	TNQ Region:	Latitude 9° south to 19° south.	
		Longitude 130° east to 146° east.	
	Cairns City:	Latitude 17° south, Longitude 146° east.	
<b><u>Cities similar latitude</u></b>			
Goa (India), Danang (Vietnam), Manila (Philippines), Kingston (Jamaica), Harare (Zimbabwe), Suva (Fiji), Porto Seguro (Brazil).			
<b><u>Distances (approximate direct)</u></b>			
Cairns – Brisbane	1,450 km	Cairns – Tokyo	6,700 km
Brisbane – Melbourne	1,400 km	Sydney – Tokyo	8,600 km
Cairns – Port Moresby	800 km	Cairns – Hong Kong	5,400 km
Cairns – Townsville	300 km	Sydney – Hong Kong	7,500 km
London - Paris	350 km	Cairns - Singapore	4,800 km

Comment: The city services a region 1½ times the size of Victoria and as large as the British Isles. The region accounts for 27% of Australia's water run off. Its largest river basin, that of the Mitchell, has a mean annual runoff just behind that of the Murray Darling system. Given more recent rainfall patterns, it is quite likely that in recent years, the Mitchell Basin has emerged as Australia's largest in terms of water runoff.

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*Note <sup>(1)</sup>: The TNQ region is taken to comprise the Far North Queensland Statistical Division plus the Gulf Shire areas of Carpentaria, Burke and Mornington.*

*Source: Cummings Economics from: Areas, ABS & Britannica Atlas; Rainfall, Australian Bureau of Meteorology; Water resources, National Land & Water Resources Audit.*

# Comparative Areas & Water Resources

## Areas

	<u>Sq Km</u>
<b>TNQ Region (1)</b>	<b>380,758</b>
Victoria	227,595
Tasmania	67,914
British Isles	314,298
California	411,013

## Average Annual Rainfall

<u>Av Annual Rainfall</u>	<u>mm</u>
<b>Cairns</b>	<b>1,992 mm</b>
Tully	4,321 mm
Atherton	1,400 mm
Normanton	920 mm
Weipa	1,777 mm

## Water Resources – Mean Annual Runoff - megalitres

	<u>Total</u>
<b>TNQ Region (1)</b>	<b>105.4 million</b>
Australia total	387.2 million
(Cairns Region % Australia)	(27%)

<u>(Biggest River)</u>	
(Mitchell)	(22.9 million)
(Murray Darling)	(23.8 million)

## Caution – Statistical Notes

Boundary Definitions: Boundary definitions are given where applicable in notes to individual tables. However, in general, TNQ Region is generally taken in this publication as the city's wider servicing area including the Far North Queensland Statistical Division from Cardwell north to the Papua New Guinea border and west to Croydon, plus the Gulf Shire areas of Carpentaria, Burke and Mornington.

Cairns City: There are two boundary areas for Cairns. First, there is Cairns Regional Council (Local Government Area) which includes the area from Babinda through to Ellis Beach (but not Yarrabah), and in early 2008 was expanded to include the former Douglas Shire. Within this area, there is Cairns Part-A – the area from Gordonvale through to Ellis Beach, which roughly defines Cairns as an urban area. In this publication, this area is referred to as Cairns City (SSD) Statistical Sub Division. Where applicable, in comparison tables, equivalent statistical sub divisions of other cities are used.

Populations: See notes to individual tables. However, there are two types of populations: 1) 'Total' (or Census count type) population that includes residents (less residents away) plus visitors. 2) 'Estimated Residential Population' that includes residents away and excludes visitors. For a great many economic activities, the relevant population is the 'Total' population.

Visitors: Care should be taken in interpreting the term 'visitors'. It cannot be assumed that it equates with 'tourists'. It can include visitors for various non-holiday purposes including conferences, business, medical, visiting friends and relatives, work, transiting, etc.

Local Government Amalgamations/Boundaries Used: In March 2008, major amalgamation of local government councils took place in the region.

### New Regional Council

Cairns

Cassowary Coast

Tablelands

### Former City/Shire Council

Cairns and Douglas

Johnstone and Cardwell

Mareeba, Atherton, Eacham, Herberton.

In this publication, where possible, the new regional Council boundaries are used followed by RC meaning "Regional Council". If the old Council boundaries are used, the name is used followed by 'fmr' meaning former Council.

# **Cairns Regional Economy Structure, Size & Growth**

Comment: Cairns Regional Council LGA total (census count type including visitors) population is now (in 2009) over 180,000. The region's total census count type population is now at 288,000 and approaching the 300,000 level.

The tables illustrate the large visitor populations that add to residential populations.

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*Note <sup>(1)</sup> : The figures are for Cairns City Part-A Statistical Sub Division (SSD) - Gordonvale to Ellis Beach, and Cairns Regional Council LGA that includes the former Cairns City and Douglas Shire LGA's. The Yarrabah community, FNQ Statistical Division is not included in these figures.*

*Note <sup>(2)</sup> : The Cairns/FNQ Statistical Division is defined to include the Far North Statistical Division only.*

*Source: Cummings Economics from ABS Census count data, 2006 & Estimates of Residential Population 2006. Current 2009 population estimate was derived by Cummings Economics from the 2007 & 2008 data plus estimated growth rate for 2008/09.*

## Population – Current & Structure

### Est Current Population, 2009

	Cairns City (SSD) <sup>(1)</sup>	Cairns RC LGA <sup>(1)</sup>	Cairns/FNQ Stat Div <sup>(2)</sup>
<b>Total (census count type)</b>	<b>160,000</b>	<b>183,000</b>	<b>288,000</b>
<b>Residential</b>	<b>146,000</b>	<b>163,000</b>	<b>269,000</b>

### Est Population Composition, 2006 Census

	Cairns City (SSD) <sup>(1)</sup>	Cairns RC LGA <sup>(1)</sup>	Cairns/FNQ Stat Div <sup>(2)</sup>
Est Total (census count type)	143,436	165,014	264,676
Residents counted at home	117,262	131,515	220,230
Visitors	26,174	33,499	44,446
Less est residents away	14,302	15,990	27,359
Est nett visitor population	11,872	17,509	17,087
Est residential population	131,564	147,505	247,589

Comment: The table gives estimated residential populations (not total (Census count type) populations). Figures are for June 2008.

The table indicates that Cairns City has a typical 'capital city' relationship to the region it services, ie. it accounts for over 50% of the region's population. Along with the old Douglas Shire area, Babinda area, and Yarrabah, Greater Cairns is now over 160,000 in population and accounts for about 60% of the region's residential population.

Populations of the Cassowary Coast is around 30,000, the Tablelands around 45,000. The remoter Gulf/Peninsula/Torres Strait area about 30,000. This compares with other Queensland remote area populations, Mt Isa/North West 12,000, Roma/North West 26,000.

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*Note <sup>(1)</sup> : Cairns region is defined as the Far North Q'ld Statistical Division plus the Gulf Shire areas of Carpentaria, Burke, Doomadgee and Mornington.*

*Source: Cummings Economics from ABS data.*

# Population – Regional

## Estimated Residential Population, Cairns/TNQ Region <sup>(1)</sup>, 2008

Cairns City Part-A	142,001	<b>53%</b>
Babinda area	5,208	
Douglas (fmr)	11,444	
Total Cairns	158,653	
Yarrabah (AC)	2,636	
<b><u>Greater Cairns</u></b>	<b>161,289</b>	<b>60%</b>
Cardwell (fmr)	10,387	
Johnstone (fmr)	19,969	
<b><u>Cassowary Coast R.C.</u></b>	<b>30,356</b>	<b>11%</b>
Atherton (fmr)	12,239	
Eacham (fmr)	6,859	
Herberton (fmr)	5,859	
Mareeba (fmr)	20,340	
<b><u>Tablelands R.C.</u></b>	<b>45,297</b>	<b>17%</b>

Croydon (S)	276	
Etheridge (S)	932	
Carpentaria (S)	2,117	
Burke (S)	562	
Communities (AC)	4,142	
<b><u>Gulf</u></b>	<b>8,029</b>	<b>3%</b>
Cook (S)	3,812	
Weipa (T)	3,291	
Communities (AC)	4,179	
<b><u>Peninsula</u></b>	<b>11,282</b>	<b>4%</b>
Torres (fmr)	3,690	
Communities (IC)	7,159	
<b><u>Torres Strait</u></b>	<b>10,849</b>	<b>4%</b>
<b>Total TNQ Region</b>	<b>267,102</b>	<b>100%</b>

Comment: The chart illustrates that although Townsville City is marginally larger than Cairns City in total population, the Cairns Region is now the largest in population in Northern Australia, even when the adjacent western areas are added, which in Townsville's case includes the Mt Isa area.

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*Note: Cities defined by relevant ABS City Statistical Sub Divisions.*

*Note (1): Cairns Region defined as Far North Q'ld Statistical Division plus Gulf Shire areas of Carpentaria, Burke and Mornington of North West Statistical Division.*

*Note (2): Townsville Region defined as Northern Qld Statistical Division plus Hughenden to Mt Isa area of North West Statistical Division.*

*Note (3): Darwin Region defined as the whole of the Northern Territory.*

*Note (4): Rockhampton Region defined as the Fitzroy Statistical Division plus the Central West Statistical Division based on Longreach.*

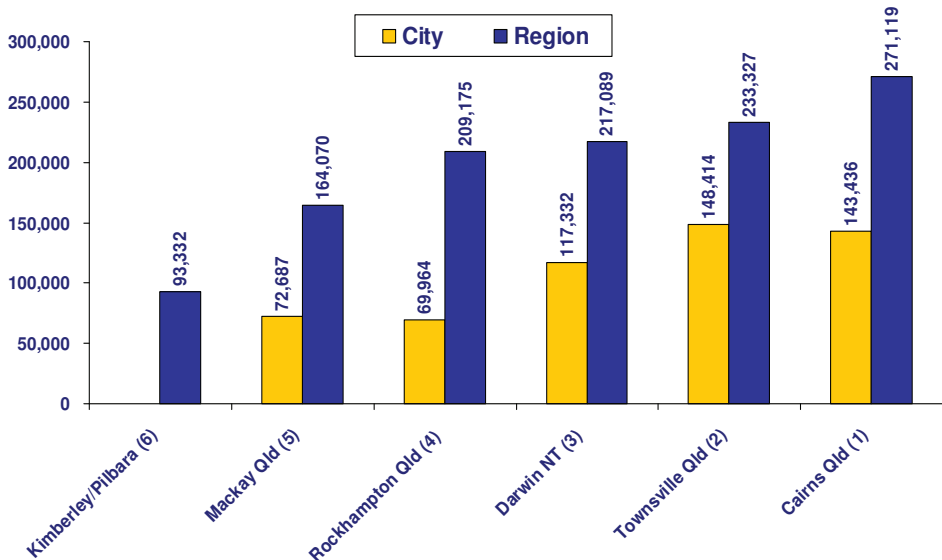
*Note (5): Mackay Region defined as the Mackay Statistical Division alone.*

*Note (6): Kimberley and Pilbara Statistical Divisions.*

*Source: Cummings Economics from ABS Census data.*

# Population – Comparative Size

Comparative Populations – Northern Australia  
Census Count 2006



Comment: The table indicates the radical change that has taken place over the last 60 years in Queensland's regional city structure. It illustrates how in 1947 there were three 'first tier' regional cities in south east, central, and northern Queensland (Toowoomba, Rockhampton, and Townsville), each with about 34-35,000 population and three second tier cities (Bundaberg, Mackay and Cairns with populations around the 14,000 to 16,000 mark). The table illustrates how the long-term growth of the northern cities has outstripped those in the south and how within the north, the higher rainfall coastal cities of Cairns and Mackay have grown faster than the old 'pastoral industry' ports with Cairns now just behind Townsville in size and Mackay now exceeding Rockhampton.

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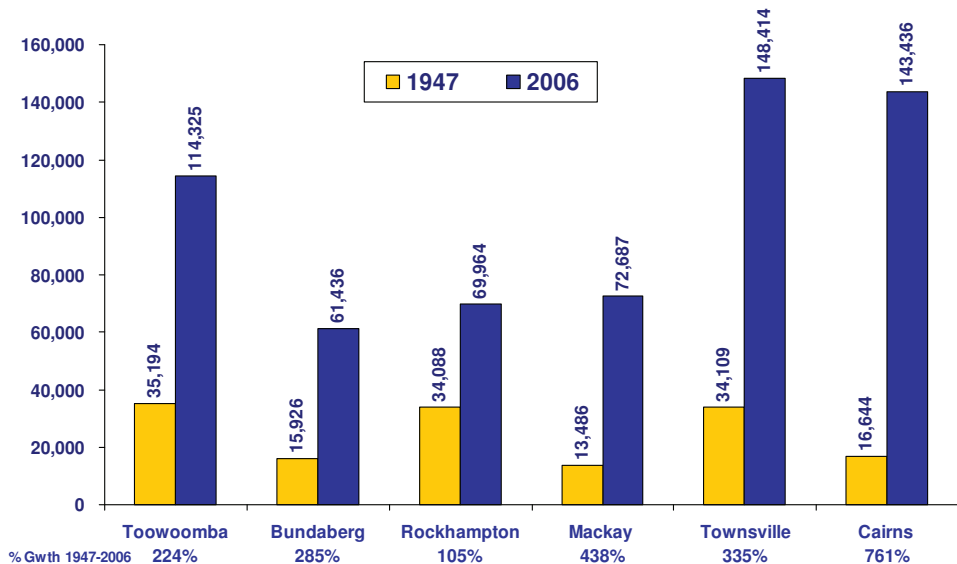
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*The 1947 figures are for City LGA's. All of the cities have now spilled over into surrounding rural shires and the 2006 figures are for the relevant ABS City Statistical Sub Divisions.*

*Source: Cummings Economics from: 2001 - ABS Census data & 1947 - Q'ld Year Book 1957.*

# Population – Long-Term 50-Year Growth

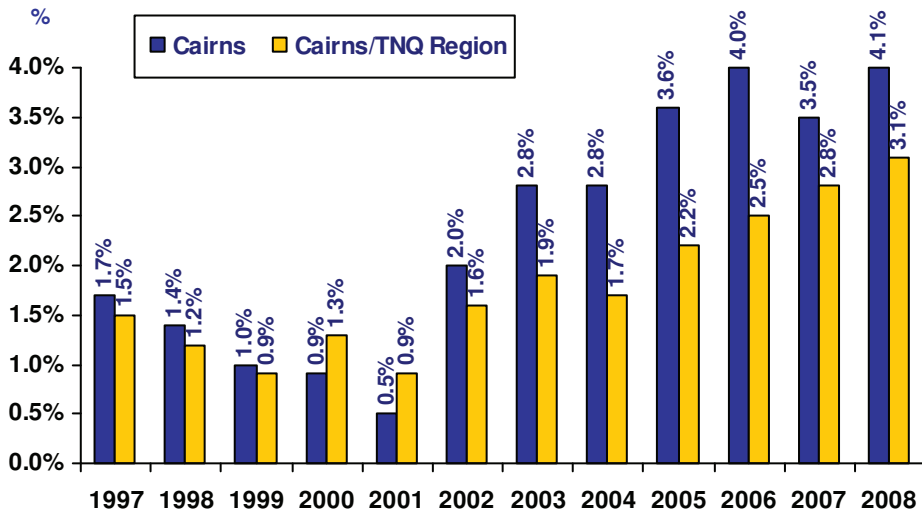
(Census Count 1947 & 2006)  
Queensland Main Regional Cities





# Population – Growth on Previous Year

## Cairns Region <sup>(1)</sup> (Estimated Residential)



Comment: A feature of the Cairns/TNQ region's population is a large indigenous element, second only to the Northern Territory in size and comprising about 14% of the region's total population.

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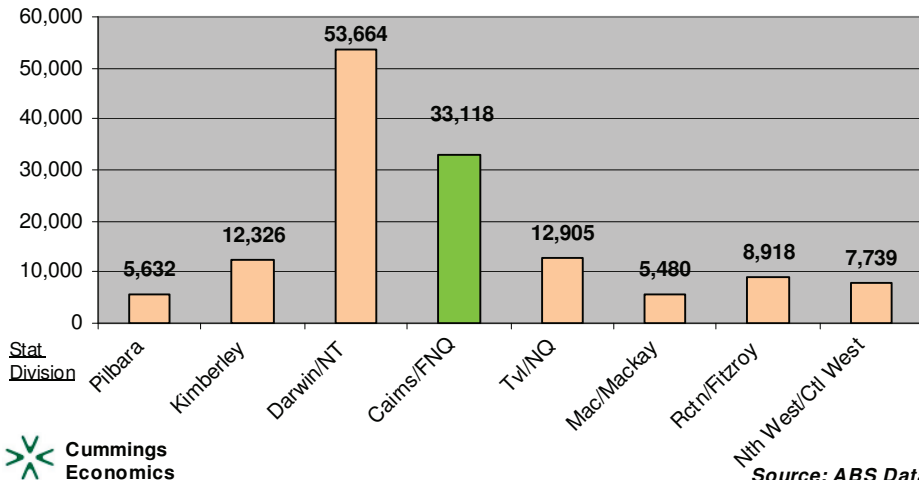
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*Source: Cummings Economics from ABS Census data.*

## TROPICAL AUSTRALIA

No. **INDIGENOUS POPULATION, Usual Place of Residence, 2006 Census**



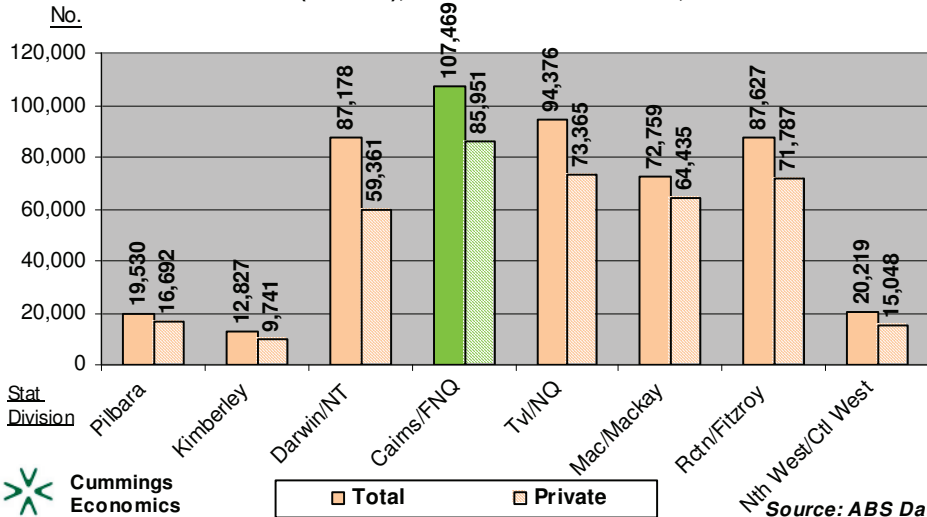


# **Workforce**



## TROPICAL AUSTRALIA - WORKFORCE SIZE

Total & Private (Non-Gvt), Usual Place of Residence, 2006 Census





# Employment

Far North Qld Statistical Division  
July 2009

Employed	127,300
Unemployed	16,300
Unemployment rate	11.0%
Participation rate	66.2%

<b><u>cf Participation Rates:</u></b>	
North, North West	71.6%
Mackay, Fitzroy, Central West	70.1%
Darling Downs, South West	66.2%
Wide Bay Burnett	56.1%

Comment: The profile of the region indicates its strength in agriculture, fishing & forestry, accommodation, and food services, etc, transport & warehousing, public administration & safety (including defence), and arts and recreation services, but lower proportions compared to Queensland averages in manufacturing, information media and telecommunications, professional, scientific and technical education, health and community services.

Although it is below State averages in finance & insurance and property & business services, the Far North leads the Northern region by a substantial margin in these fields.

Finance & Insurance: Far North SD 1,822, Northern SD 1,508; Property & Business Services: Far North SD 7.481, Northern SD 6,244.

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*Source: Cummings Economics from ABS Census data 2006.*

# Employment - Workforce Structure

## Far North Statistical Division, Census 2006

	<u>No.</u>	<u>%</u>	<u>(cf Q'ld %)</u>		<u>No.</u>	<u>%</u>	<u>(cf Q'ld %)</u>
Agric, Forestry & Fishing	6,291	5.9	(3.4)	Finance & Insurance Services	1,724	1.6	(2.9)
Mining	1,323	1.2	(1.7)	Renting, Hiring & Real Estate Services	2,077	1.9	(2.1)
Manufacturing	6,980	6.5	(9.9)	Professional, Scientific & Technical	3,938	3.7	(5.6)
Electricity, Gas, Water, etc	1,067	1.0	(1.0)	Admin & Support Services	3,674	3.4	(3.1)
Construction	9,502	8.8	(9.0)	Public Admin & Safety	11,478	10.7	(6.7)
Wholesale Trade	2,959	2.8	(3.9)	Education & Training	7,560	7.0	(7.6)
Retail Trade	12,444	11.6	(11.6)	Health Care & Social Assistance	9,959	9.3	(10.2)
Accom & Food Services	10,385	9.7	(7.0)	Arts & Recreation Services	1,591	1.5	(1.3)
Transport, Postal & Warehousing	6,397	6.0	(5.1)	Other Services	3,708	3.5	(3.7)
Info, Media & Telecommunications	990	0.9	(1.4)	Not classified/Stated	3,421	3.2	(2.7)
				<b>Total</b>	<b>107,468</b>	<b>100</b>	<b>(100)</b>



**Economic Aggregates  
(GRP, Base Industries,  
Business Numbers,  
Taxable Incomes)**

Comment: The tables indicate that the composition of GRP in the region varies from the State average, being high in agriculture, accommodation, cafes, etc, transport, etc, construction and government administration, defence, education, health and community services.

Tourism is defined by the customer and not by the product and has elements in a number of industry classifications shown in the above table, including accommodation, cafes etc., retail, and transport. OESR estimated that total tourism contribution to GRP in 1998/99 was 14.4%. It should be noted that this is only the value added by businesses dealing direct with visitors and does not include second round and flow-on effects. Estimates by Cummings Economics puts the full impact of tourism on the regional economy at up towards 30% of GRP being directly or indirectly dependent on the industry.

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*Note <sup>(1)</sup>: The latest official Queensland Government GRP figures are for 2005/06. Other estimates have been published by private companies but it should be noted that they can vary considerably from the official OESR figures.*

*Source: Cummings Economics from Q'ld Office of Economic & Statistical Research.*

# Gross Regional Product by Industry

Composition of Gross Value Added (current prices)  
Far North Q'ld Statistical Division, 2005/06 <sup>(1)</sup>

	<u>Far North Stat Division</u>	<u>Queensland</u>	<u>Diff % Points</u>
Agriculture, Forestry & Fishing	7.8%	3.4%	+4.4%
Mining	3.5%	10.6%	(-7.1%)
Manufacturing	5.2%	9.8%	(-4.6%)
Electricity, Gas & Water	1.7%	2.1%	(-0.4%)
Construction	8.5%	7.9%	+0.6%
Retail & Wholesale Trade	12.5%	12.4%	+0.1%
Accommodation, Cafes, etc	5.9%	2.9%	+3.0%
Transport, Storage & Communications	10.8%	8.3%	+2.5%
Finance/Insurance/Property	11.8%	15.2%	(-3.4%)
Gvt Admin, Defence, Education, Health, Community services	19.3%	15.7%	+3.6%
Cultural, Recreational, Personal & Other services	4.2%	3.6%	+0.6%
Ownership of Dwellings	8.9%	8.3%	+0.6%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	

Comment: The Queensland Treasury figures indicate the Cairns/Far North region leads the Northern region but that the figures for the Outback, Mackay, Whitsundays and Rockhampton regions were bolstered by mining revenue. It can be expected that the region's Gross Regional Product is now over \$10bn.

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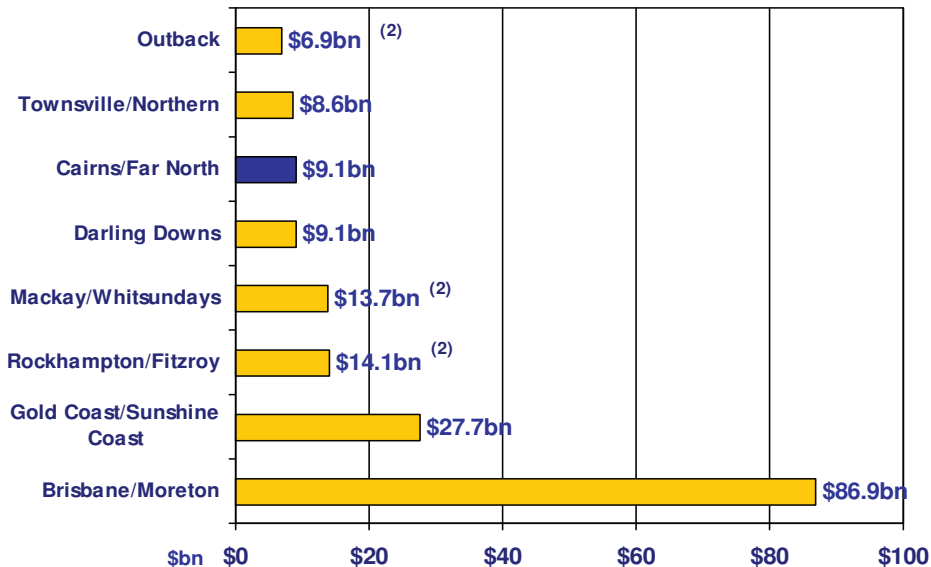
*Note <sup>(1)</sup>: The latest official GRP figures are for 2005/06 and are described as “experimental estimates”. Other estimates have been published by private companies but it should be noted that they vary considerably from the official Queensland Treasury figures.*

*Note <sup>(2)</sup>: The figures for these regions can be heavily affected by gross operating surplus recorded by mining companies. In many cases, little of this actually flows into the region of production.*

*Source: Cummings Economics from Queensland Treasury Experimental Estimates of Gross Regional Product.*

# Gross Regional Product Compared

## Region % of Gross State Product, 2005/06 <sup>(1)</sup>



Comment: The 'base industries' mainly earning income from outside the region are in large measure, the 'drivers' of the region's economy. A similar profile for the late 1950's indicates that the cane growing and manufacturing components of the sugar industry accounted for over 60% of the value of 'base industries'.

Since then, the region has held on to and further expanded its sugar industry but achieved strong growth in other crops, fisheries, mining, and 'other' activities like general trade and servicing. Growth of tourism in recent decades has been such that it came through to represent approaching 50% of the value of the region's 'base industries' as calculated by the early 2000's but has fallen to now represent about 40%.

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*Note <sup>(1)</sup>: It should be noted that a number of the figures for 2006/07 are estimates only based on limited information. Basis is given below.*

*Note <sup>(2)</sup>: Industries mainly oriented to earning income from outside the region*

*Sources: Cummings Economics from: Agriculture – ABS 2006/07; Mining – Q'ld Dept of Mines & Energy, 2006/07 Sale Value; Fishing – estimate based on industry information & ABARE data & DPI&F data; Manufacturing -estimate based, in part, on Queensland Treasury Gross Regional Product Value Added for mineral & primary product processing elements, and estimated turnover figures for other elements earning outside income; Tourism – based on Tourism Research Australia, NVS & IVS expenditure by overnight visitors; Other – estimate based on other research by Cummings Economics (includes elements of trade & services provided outside the region especially to nearby areas Papua Indonesia, PNG & Pacific .*

**Estimated <sup>(1)</sup>**  
**Value of 'Base Industries'<sup>(2)</sup>, 2006/07**  
**Far North Qld Statistical Division**

Agricultural & Pastoral (2006/07)	\$1,300 m	21%
Fishing (est)	\$200 m	3%
Mining (sale)	\$840 m	14%
Processing (value added) & Other Relevant Manufacturing (est)	\$900 m	15%
Tourism (2008)	\$2,450 m	40%
Other	\$400 m	7%
<b>Total</b>	<b>\$6,090 m</b>	<b>100%</b>

Comment: The Cairns/TNQ region has a very strong private enterprise orientation and leads Tropical Australia by a long way in number of businesses.

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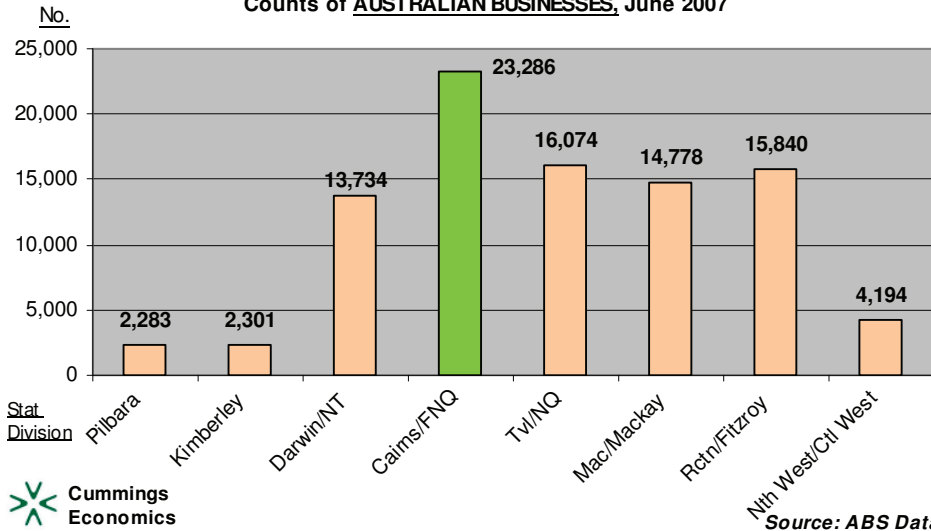
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Source: *Cummings Economics from ABS data*

**TROPICAL AUSTRALIA**  
**Counts of AUSTRALIAN BUSINESSES, June 2007**



Comment: The region's economy has recovered strongly from 2002/03 onwards, after the impacts of the Asian crisis and a range of impacts in 2000/01 and 2001/02 including GST, 9/11 and Sars. It can be expected 2006/07 and 2007/08 will show continuing strong growth in this series but for 2008/09 to fall back.

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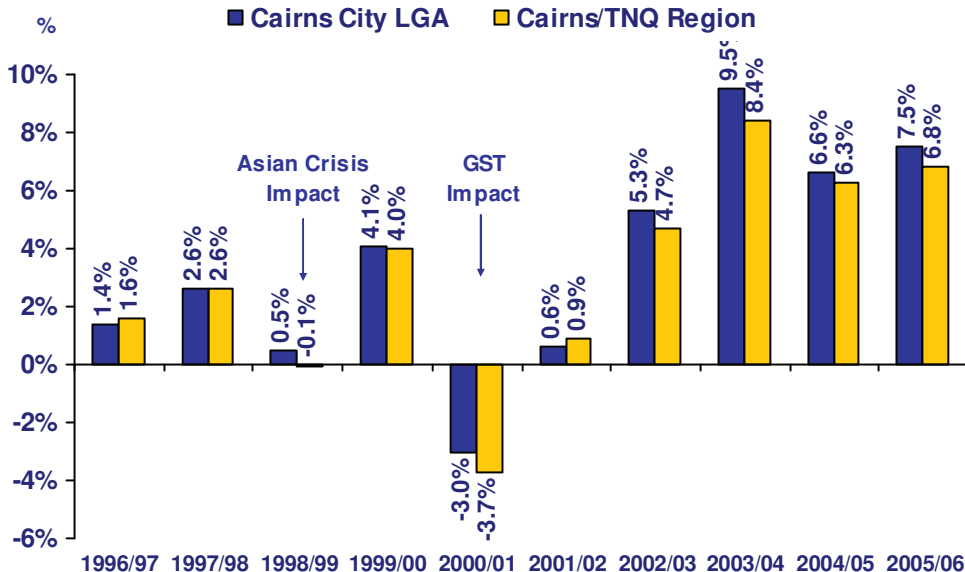
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*Note <sup>(1)</sup>: The Cairns region is taken to include the Far North Q'ld Statistical Division plus the Gulf Shire areas of Carpentaria, Burke and Mornington.*

*Source: Cummings Economics from Dept of Transport & Regional Services from Australian Tax Office data.*

# Aggregate 'Real' Taxable Incomes

## Growth – Cairns/TNQ Region <sup>(1)</sup>





# **Construction & Property Market**

Comment: In 2008/09, the Far North Statistical Division continued to lead the north in value of building approvals recorded. The region's value of building approvals continues to be about the same level as the State of Tasmania.

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*Source: Cummings Economics from ABS data.*

# **Construction**

## **Building Approvals, Regional Comparisons 2008/09**

<b>Statistical Division</b>	<b>Dwelling Number</b>	<b>Total Value</b>
<b>Far North</b>	<b>1,368</b>	<b>\$1,159 m</b>
Northern	1,404	\$943 m
Mackay	1,084	\$597 m
Fitzroy	1,033	\$552 m
Northern Territory	986	\$736 m
Tasmania	3,151	\$1,262 m

Comment: After bottoming in 2000/01, house approvals trended up in 2006/07 and 2007/08. As with the rest of Australia, 2008/09 has seen a sharp decline.

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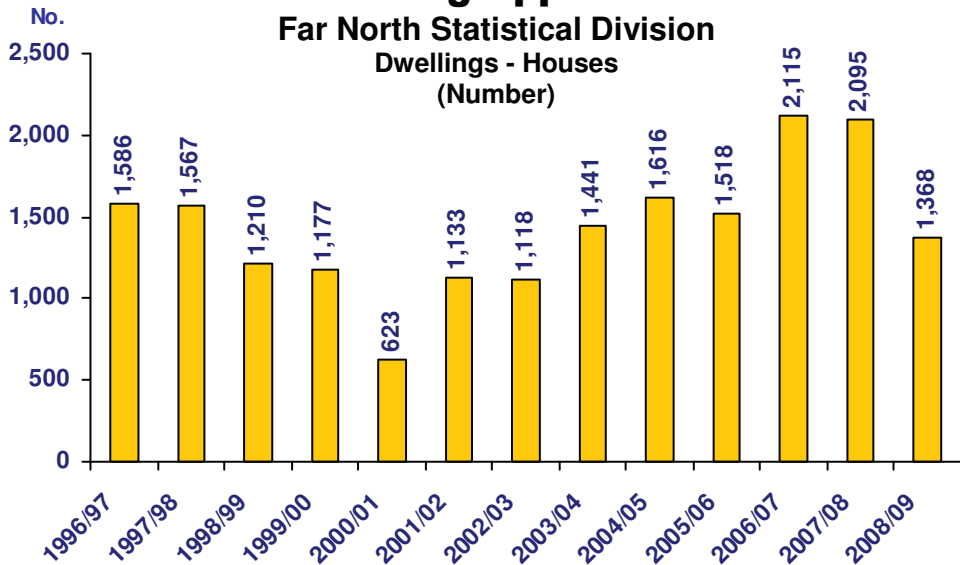
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*Source: Cummings Economics from ABS Building Approval Statistics.*

# Construction

## Building Approvals

Far North Statistical Division  
Dwellings - Houses  
(Number)



Comment: Levels of approvals of flats and units have been quite volatile and as with other parts of Australia, contracted strongly in 2008/09.

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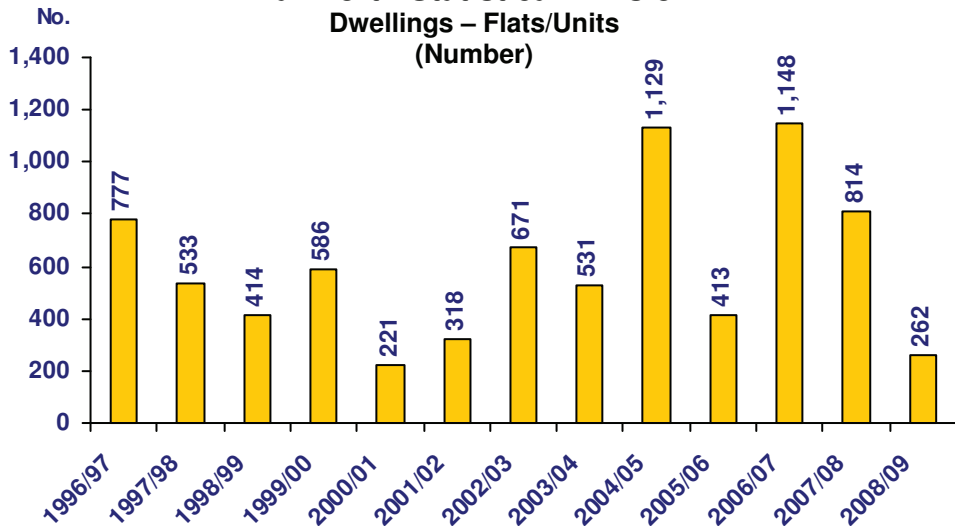
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*Source: Cummings Economics from ABS Building Approval Statistics.*

# Construction Building Approvals

Far North Statistical Division  
Dwellings – Flats/Units  
(Number)

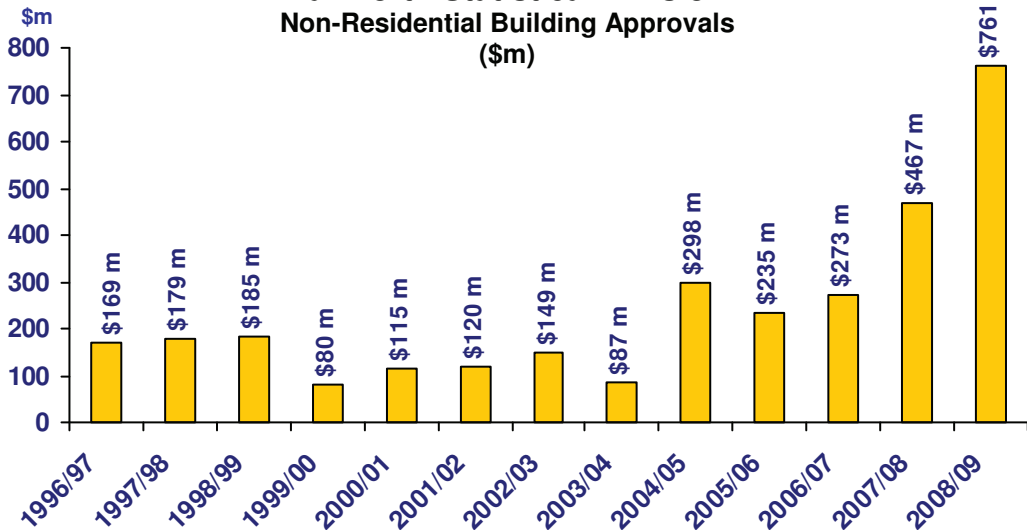




# Construction

## Value of Building Approvals

Far North Statistical Division  
Non-Residential Building Approvals  
(\$m)



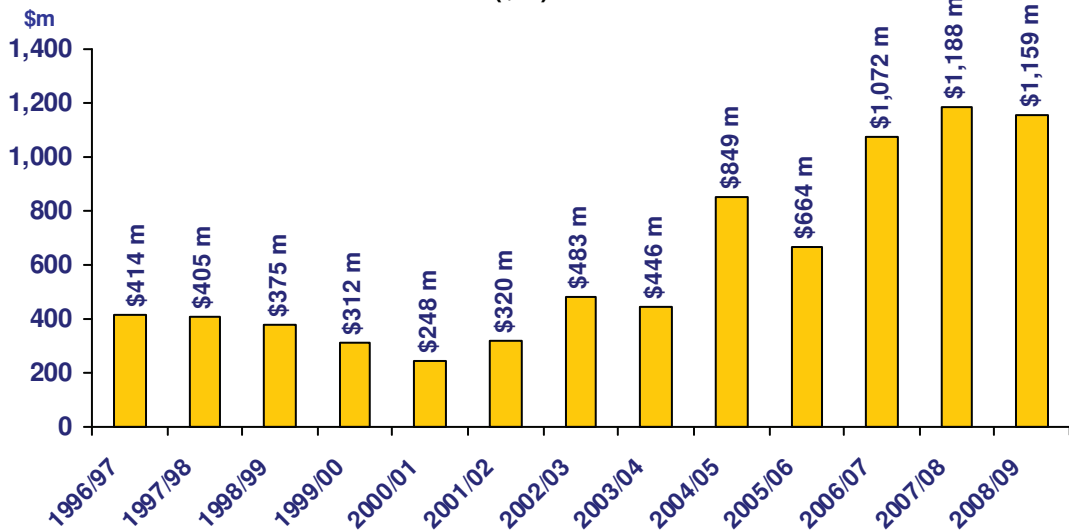


# Construction

## Total Value of Building Approvals

### Far North Statistical Division

(\$m)

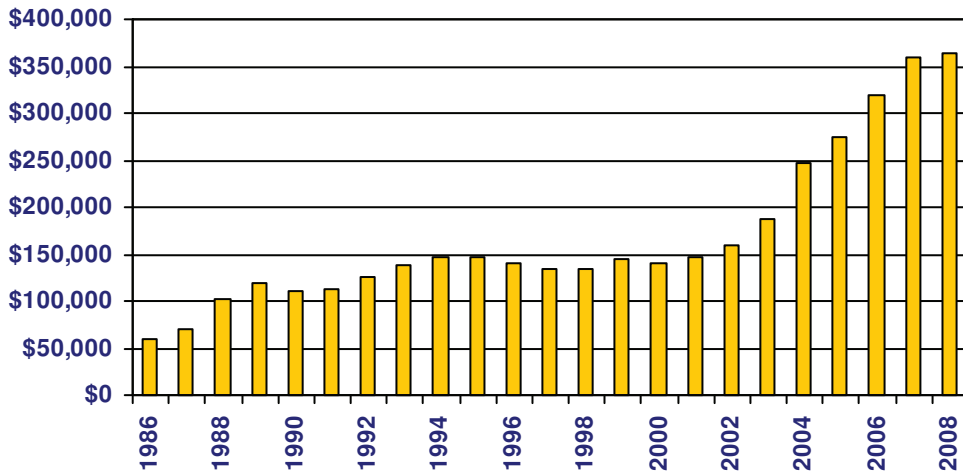




# Property Market

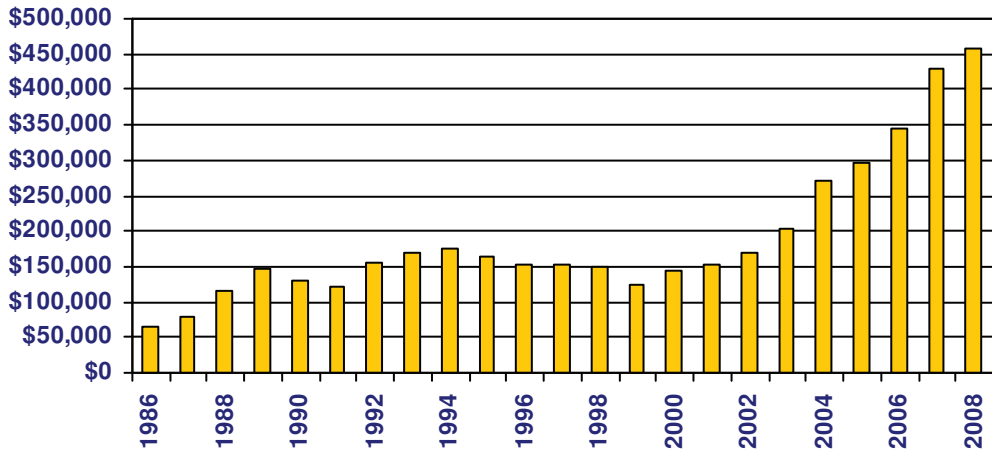
## Median Sale Prices – Houses by Calendar Year

### Cairns City LGA





# Property Market Median Sale Prices Flats/Units by Calendar Year Cairns City LGA

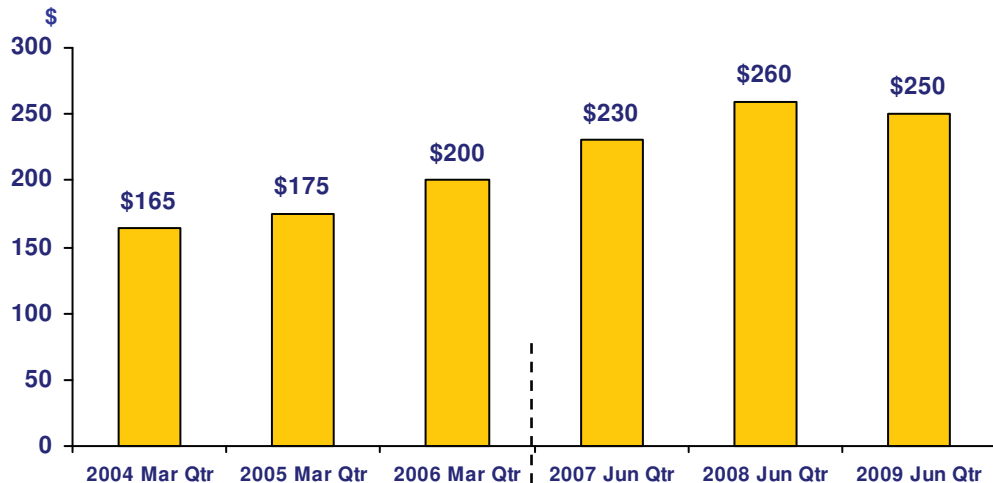




# Property Market

## Average Weekly Rentals

### 2-Bedroom Flats/Units, Former Cairns City LGA



Comment: The table shows the pattern up until 2008. By the mid-1990's, an oversupply in the stock of allotments had developed and up until 2000 low registrations took place against a background of falling consumption with consumption outrunning registrations. From 2002 to 2005, lot consumption rose strongly and registrations rose to build up stocks again. Consumption peaked in 2007. Consumption fell strongly in 2008 and registration also fell off.

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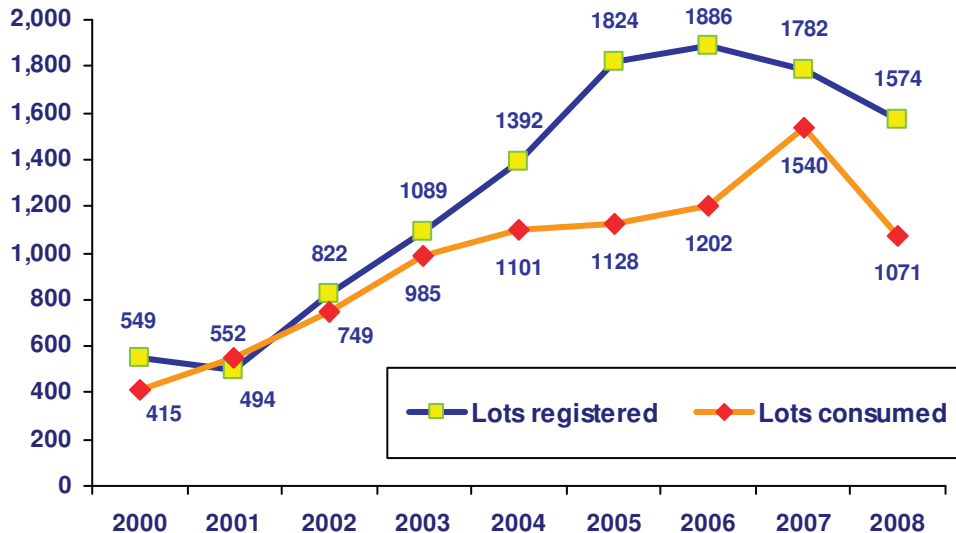
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*Source: Cummings Economics from Planning Information & Forecasting Unit (PIFU), Qld Dept of Local Government & Planning.*

# Property Market

## Lots Registered & Consumption

### Cairns Regional Council Area, 2000 - 2008





# **Tourism**



# Domestic Tourism Long-Term Growth

	<u>Visitors</u>		<u>Visitor Nights</u>		<u>Cairns Region</u>
	<u>Cairns Region</u>	<u>Australia</u>	<u>Cairns Region</u>	<u>Australia</u>	<u>Av Nights</u>
1985/86	731,000	54,026,000	4,553,000	209,000,000	<b>6.2</b>
2008	1,496,000	70,491,000	7,273,000	271,778,000	<b>4.9</b>
<b>Av Annual Growth</b>	<b>3.2% pa</b>	<b>1.2% pa</b>	<b>2.1% pa</b>	<b>1.2% pa</b>	



# International Tourism Long-Term Growth Visitor Numbers

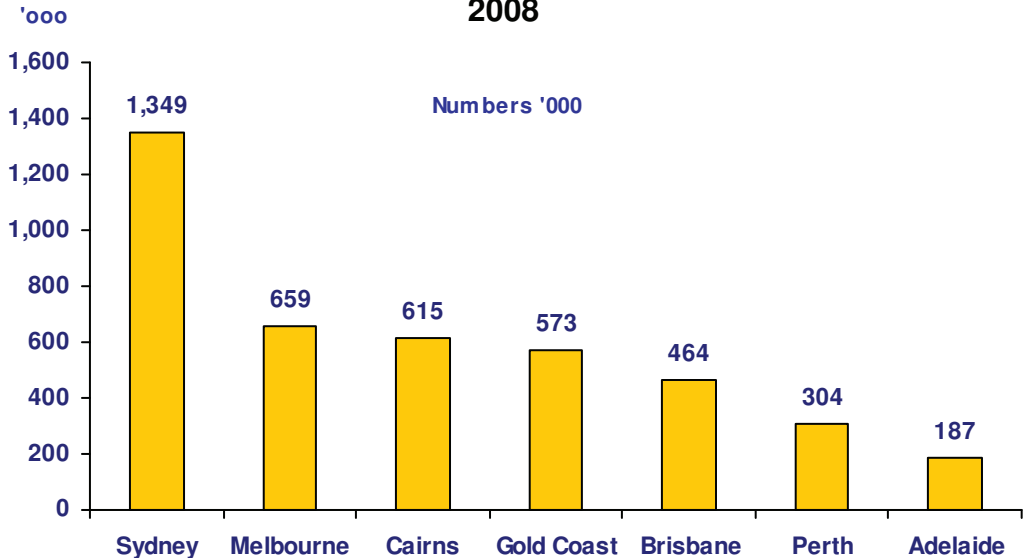
	<u>Cairns Region</u>		<u>Australia</u>		<u>Cairns as % of Australia</u>	
	Holiday	Total	Holiday	Total	Holiday	Total
1981	36,000	56,000	377,100	937,000	<b>10%</b>	<b>6%</b>
2008	615,000	756,000	2,437,000	5,167,000	<b>25%</b>	<b>15%</b>
<b>Average Annual Growth</b>	<b>11.0% pa</b>	<b>10.1% pa</b>	<b>7.1% pa</b>	<b>6.5% pa</b>		



# Tourism

## International Holiday Visitors Compared

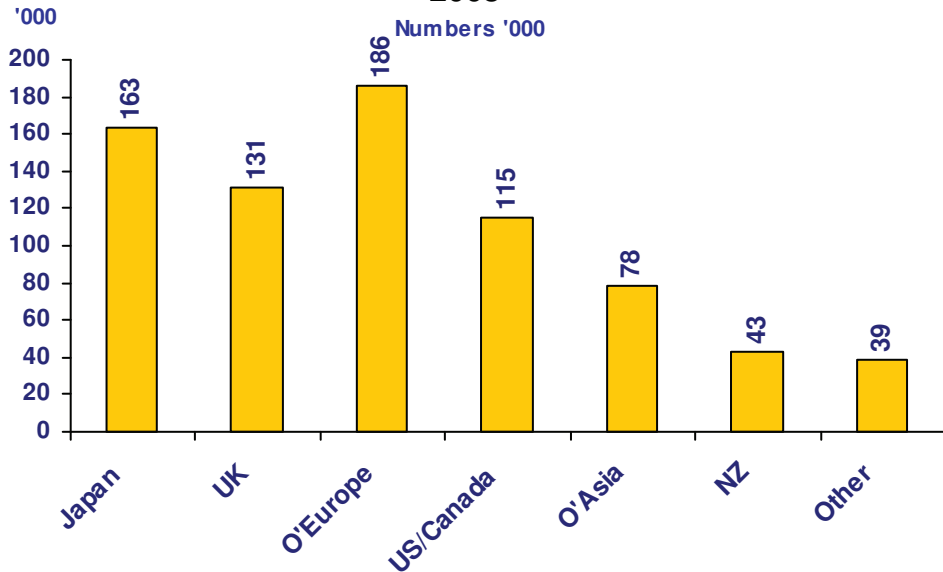
2008





# Tourism

## International Visitors to Cairns Region by Origin 2008



Comment: After declining in 2002 and 2003, strong growth was registered in 2004 and 2005, plateaued in 2006, and moved down again in 2007 & 2008.

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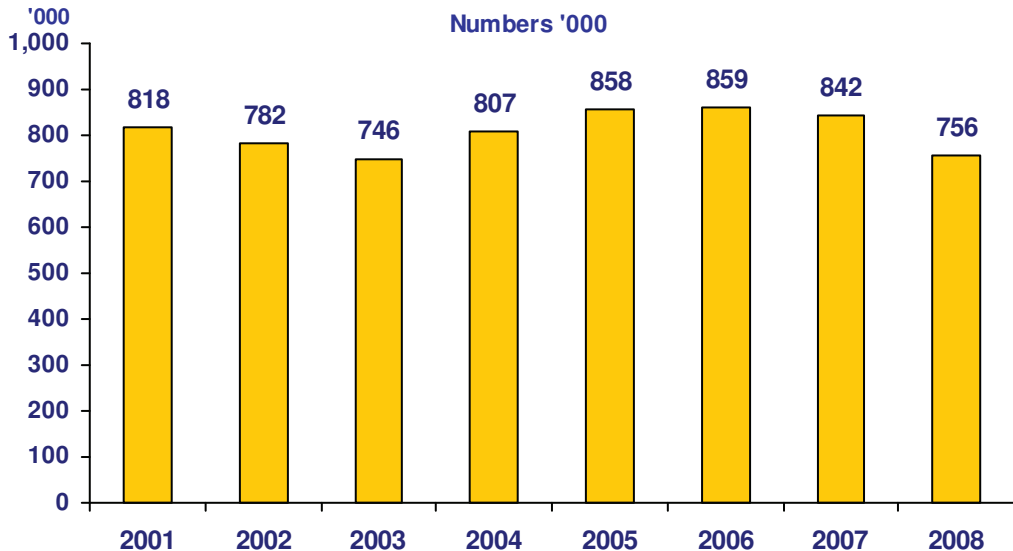
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*Source: Cummings Economics from International Visitor Survey data.*

# International Visitors Cairns Region





# Tourism

## Accommodation Compared

### Hotels/Motels & Serviced Apartments <sup>(1)</sup>

#### Stock of Rooms - March 2009

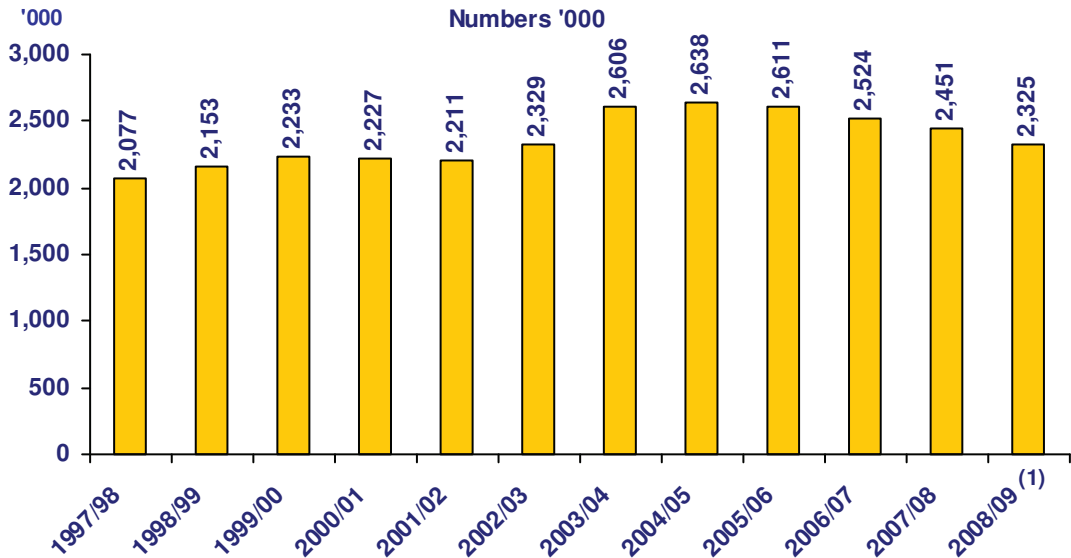
Sydney	33,073
Melbourne	24,155
Gold Coast	13,235
Brisbane	12,822
<b>Cairns Region</b>	<b>11,575</b>
Perth	10,913
Northern Territory	7,411
Adelaide	6,660
Tasmania	6,614
ACT	5,059



# Tourist Accommodation

## Far North Queensland Statistical Division

### Room Nights in Hotels/Motels & Serviced Apartments

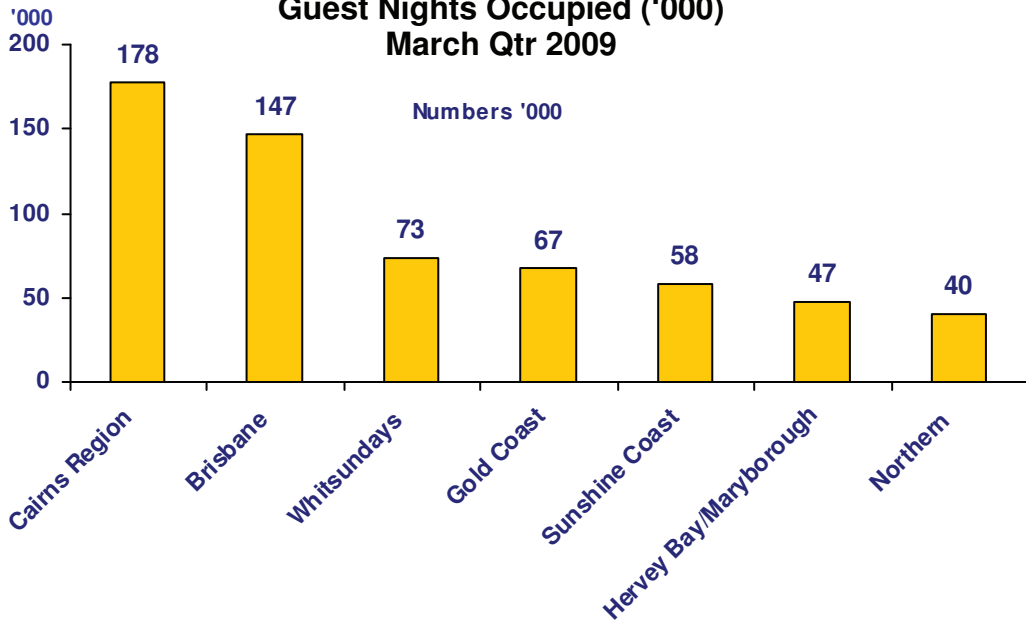




# Tourism

## Hostels Compared

### Guest Nights Occupied ('000) March Qtr 2009

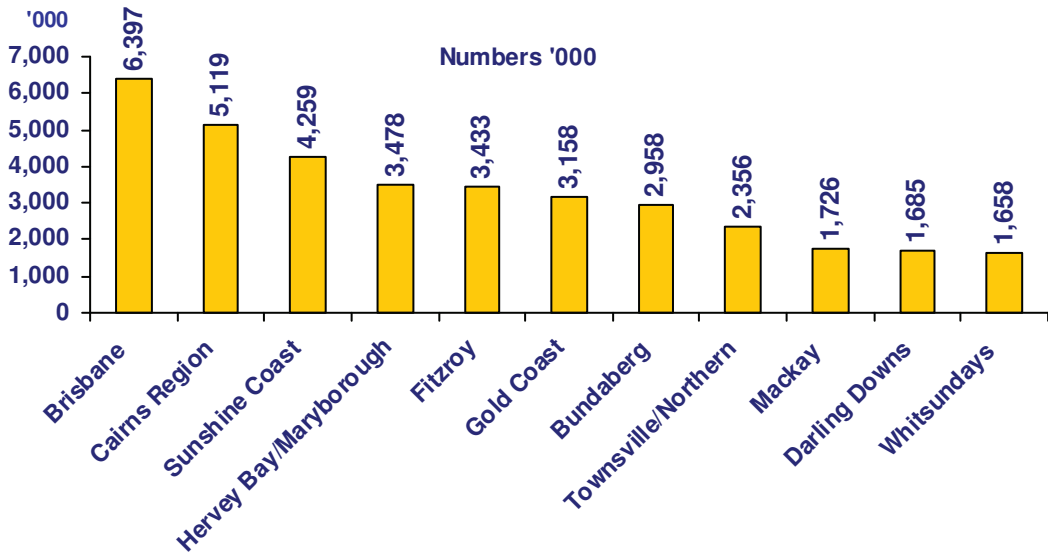




# Tourism

## Caravan Park Capacity Compared – Q'ld

(Short & Long-Term)  
March Qtr 2008



Comment: The Cairns region is the third largest region for holiday flats in Queensland after the Gold Coast and Sunshine Coast.

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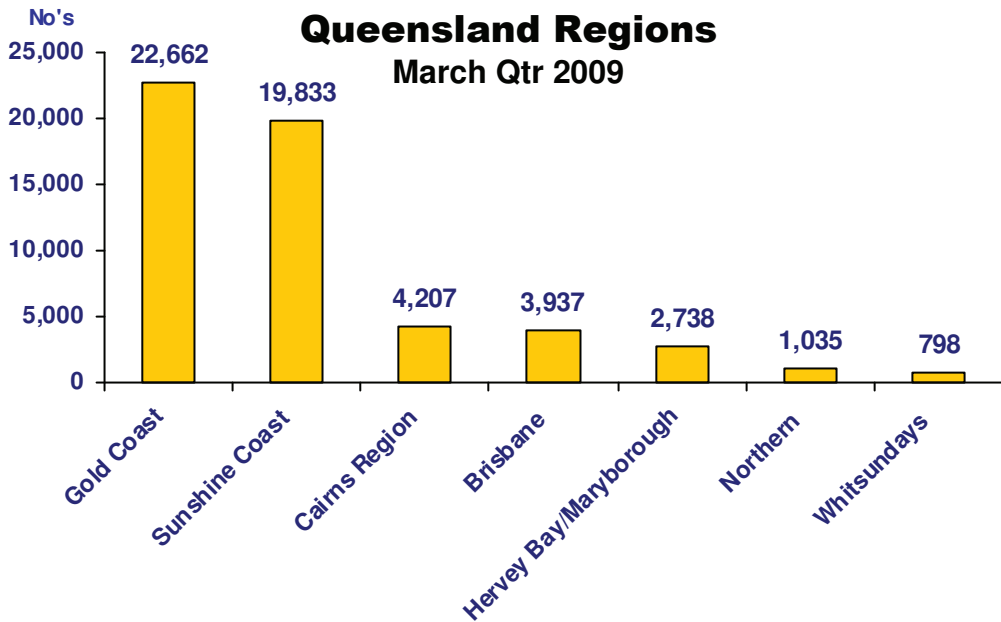
*Source: Cummings Economics from ABS data.*

# Tourism

## Holiday Flats – Bed Spaces

### Queensland Regions

March Qtr 2009





# **Primary Industries**



# Agriculture

## Gross Value <sup>(1)</sup> of Agricultural Production

### Far North Statistical Division, 2006/07

Fruit	\$849 m
Other crops	\$280 m
<b>Total crops</b>	<b>\$1,129 m</b>
<b>Total livestock production</b>	<b>\$31 m</b>
<b>Total livestock disposals</b>	<b>\$177 m</b>
<b>Total Value</b>	<b>\$1,337 m</b>

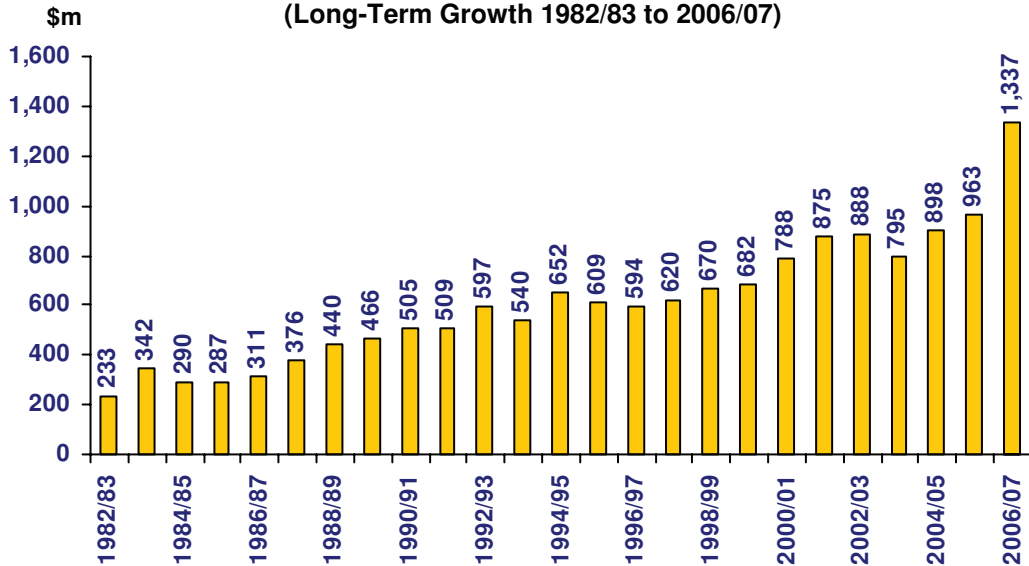
<u>Comparisons</u>	
% of Total Q'ld	14.0%
% of Total Australia	3.7%
Tasmania	\$1,056 m
Northern SD, Q'ld	\$740 m
Mackay SD, Q'ld	\$937 m
Fitzroy SD, Q'ld	1,067 m
Northern Territory	\$373 m



# Agriculture

## Gross Value Agricultural Production

(Long-Term Growth 1982/83 to 2006/07)





# Mining



## Quantity of Mining Production Far North Statistical Division. 2007/08

	Quantity	
Bauxite – abrasives	tonnes	227,919
Bauxite – metallurgical	tonnes	19,158,405
Clay - Kaolin	tonnes	815
Copper concentrate	tonnes	105,246
Copper precipitate	tonnes	460
Dimension stone	tonnes	13,558
Gems	\$	8,250
Gold/Silver	kg	16
Lead concentrate	tonnes	13,597
Lime	tonnes	19,937
Limestone	tonnes	53,359
Dolomite	tonnes	15,515
Peat	tonnes	443
Perlite	tonnes	1,798
Silica sand	tonnes	1,800,000
Silica	tonnes	118,255
Tin	tonnes	2,848
<b>Total Value of Sales</b>		<b>\$837.8 m</b>

Comment: Value of mineral sales almost doubled from 2005/06 to 2007/08. Recent high mineral prices led to a range of new mines being developed and planned. The Global Financial Crisis has seen some plans temporarily shelved. However, confidence and funding was returning in mid-2009.

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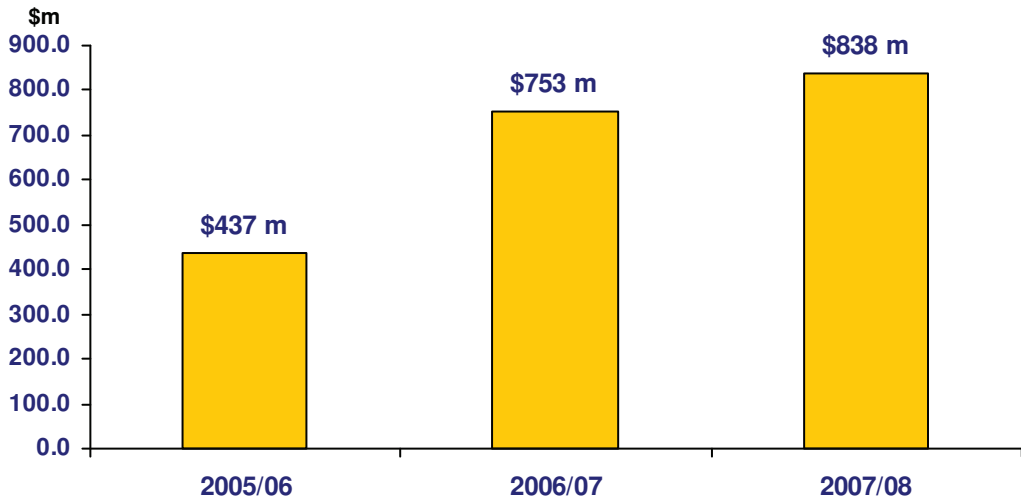
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*Source: Cummings Economics from Department of Mines & Energy.*

## Value of Mining Production/Sales Far North Statistical Division





# **Manufacturing**



# MANUFACTURING

## Composition, Far North Statistical Division, 2006/07

	Locations
Food, Beverages, Tobacco	133
Textile clothing, Footwear, Leather	64
Wood & Paper product	85
Printing, Publishing & Recycling media	59
Petroleum, Coal, Chemical & assoc products	49
Non-Metallic Mineral products	36
Metal products	206
Machinery & Equipment	219
Other Manufacturing	111
<b>Total</b>	<b>962</b>
<b>Total Wages &amp; Salaries</b>	<b>\$311 m</b>
<b>Total Income, Sales &amp; Service</b>	<b>\$3,280 m</b>
<b>Increase in Value, Wages &amp; Salaries – 2001/02 to 2006/07</b>	<b>+62%</b>
<b>Increase in Total Sales &amp; Service Income - 2001/02 to 2006/07</b>	<b>+193%</b>

### No. of Locations, and Sales & Service Income Compared

▪ <b>Far North</b>	<b>962</b>	<b>\$3,280 m</b>	▪ Darling Downs	990	\$2,442 m
▪ North	653	\$4,260 m	▪ Wide Bay/Burnett	1053	\$1,836 m
▪ Mackay	585	\$1,648 m	▪ Northern Territory	506	np
▪ Fitzroy	586	\$3,600 m	▪ Kimberley/Pilbara	197	np

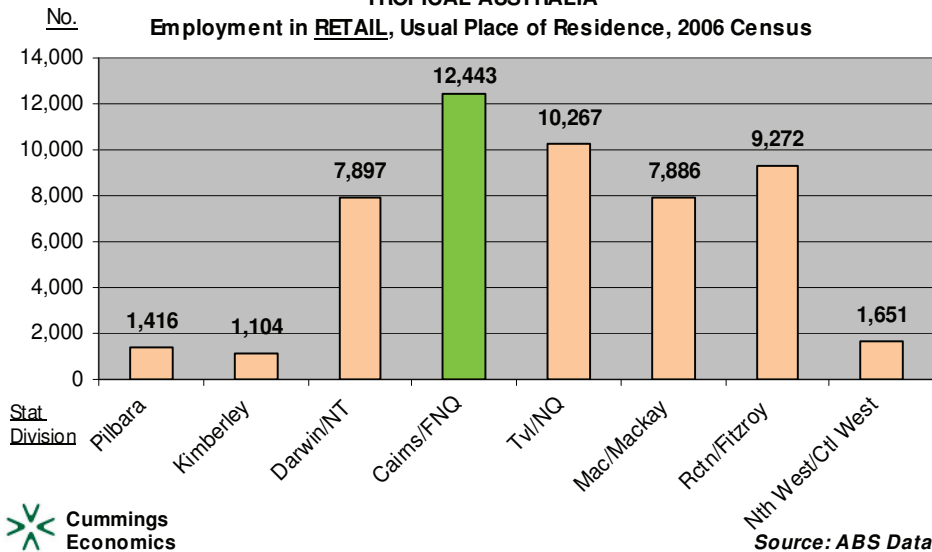


# **Service Industries**



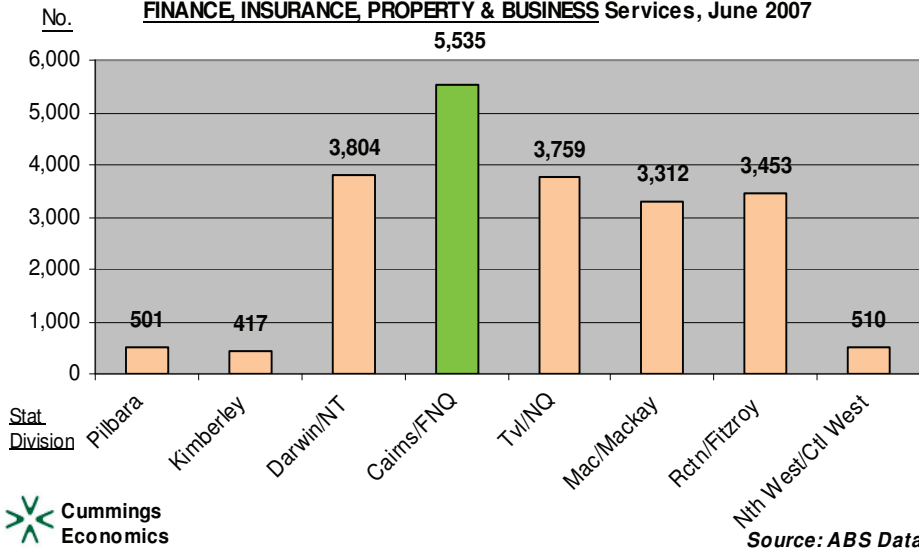
## TROPICAL AUSTRALIA

### Employment in RETAIL, Usual Place of Residence, 2006 Census



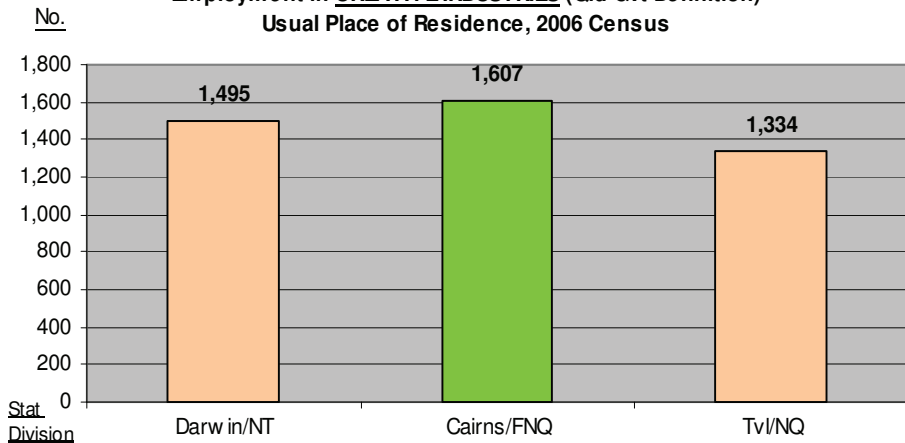


**TROPICAL AUSTRALIA - Business Numbers in  
FINANCE, INSURANCE, PROPERTY & BUSINESS Services, June 2007**





**TROPICAL AUSTRALIA**  
**Employment in CREATIVE INDUSTRIES (Qld Gvt Definition)**  
**Usual Place of Residence, 2006 Census**





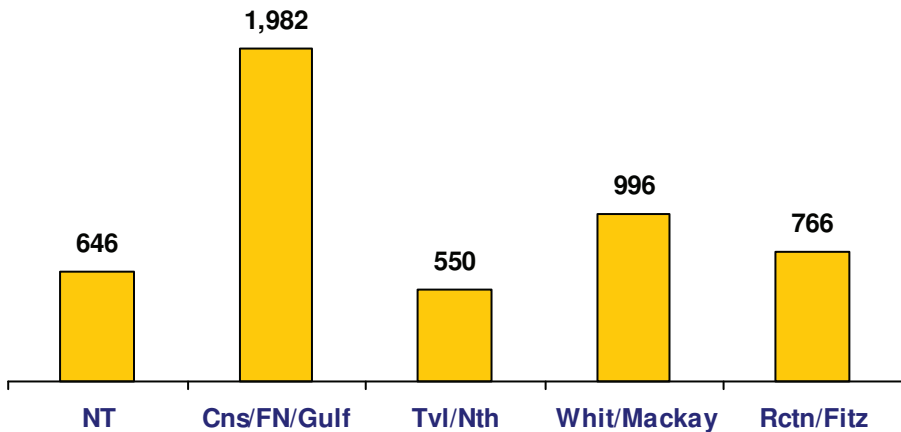
# **Marine Sector**



# **Marine Sector**

## **Employment in Marine Industries**

### **Statistical Divisions, Northern Australia, 2006 Census**



Comment: The region has one of the largest fishing sectors in Australia. Reductions over the years in the prawn fishing effort have been offset by diversification into other species. Substantial quantities are exported by air, mainly to Asian countries.

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Note:

- (1) *Based on 32 Gulf trawlers based in Cairns. Average turnover \$1.65m (current 2008/09 prices) (in 2007/08 values CPI Brisbane) and crew of 5.*
- (2) *Value official statistics AFMA. There is a great deal of part-time employment, especially indigenous – employment is not able to be estimated.*
- (3) *Value official statistics. Turnover per vessel not known and employment not able to be estimated.*
- (4) *Value QDPIF Statistics. Estimated employment at \$150,000 turnover per employee.*
- (5) *Value estimate 50 boats based in region of which 7 are in the Torres Strait figures leaving 43 east coast. Average turnover \$625,000 gives \$27m turnover. Employment 130.*
- (6) *Industry information.*
- (7) *Estimates based on industry information.*
- (8) *QDPIF website data for 2006/07 adjusted to 2007/08 values.*

*Source: Cummings Economics from Far North Q'ld Marine Industries – Capability Profile, 2009.*

# Marine Sector – Fishing Industry

## Estimated Value of Production of Fisheries

### Cairns Region, 2007/08

	Notes	Est Approx Turnover	Notes	Est Employment
<b><u>Commonwealth Fisheries</u></b>				
Northern Prawn Fishery	(1)	\$53 m	(1)	160
Torres Strait	(2)	\$15 m	(2)	not available
Coral Sea Fishery	(3)	\$ 1 m	(3)	not available
<b>Total</b>		<b>\$69 m</b>		not available
<b><u>Queensland Fisheries</u></b>				
Other Gulf Net & Trawl	(4)	\$15 m	(4)	100
East Coast Prawn	(5)	\$26 m	(5)	130
Live Trout	(6)	\$15 m	(6)	120
Other East Coast (Cray/, Beche- de-Mer, Tuna, Aquarium, Crab)	(7)	\$28 m	(7)	180
Mariculture/Aquaculture	(8)	\$22m	(8)	210
<b>Total</b>		<b>\$106 m</b>		<b>740</b>

Comment: Local vessel operations (including fishing and tourism) have a turnover of about \$571m.

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Note:

- (1) *Does not include employment in Torres Strait and Coral Sea Fishery. Much of this employment is on a part of year basis only.*
- (2) *Estimate derived from est turnover of \$150m divided by est of \$200,000 per person employed.*

*Source: Cummings Economics from Far North Q'ld Marine Industries – Capability Profile, 2009.*

## **Marine Sector – (est 2007/08)**

### **Vessel Operations, Cairns/Far Northern Region**

<b>Local Vessel Operations Only</b>			
	<b>Est Turnover</b>	<b>Est Employment</b>	<b>Notes</b>
Fishing Commercial & Recreational	\$200 m	900	(1)
Trading & Other Work Vessels	\$75 m	360	
Reef Fleet & Tourism	\$150 m	750	(2)
Government & Pilot Vessels	\$146 m	960	
<b>Total</b>	<b>\$571 m</b>	<b>2,970</b>	

Comment: Cairns is the north's largest and one of Australia's leading shipbuilding repair and maintenance centres.

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*Source: Cummings Economics from Far North Q'ld Marine Industries – Capability Profile, 2009.*

# Marine Sector

## Repair & Maintenance Operations by Sub Groupings for Cairns and for Outside of Cairns

	No. of Firms	Est Turnover	Est Equip Full-time Employment
Engineering/Painting & Coating	22	\$15 m	114
Marine Electrics, Electronics, Sonar, etc	23	\$11 m	57
Shipwrights etc.	6	\$3 m	23
Marine Engines	10	\$10 m	48
Marine Refrigeration, Aircon, Hydraulics & Insulation	11	\$9 m	40
Outside of Cairns	40	\$6 m	60
<b>Total</b>	<b>112</b>	<b>\$54 m</b>	<b>342</b>

Comment: Apart from vessel operations and the repair and maintenance operations, the marine sector involves a great deal of services backup.

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*Source: Cummings Economics from Far North Q'ld Marine Industries – Capability Profile, 2009.*

# Marine Sector

## Other Marine Industry Services

Cairns	Est Turnover	Employment
Shipping & Customs Agents & Stevedoring	\$7.4 m	23
Marine Surveying & Naval Architecture	\$1.7 m	17
Marine Retailing & Boat Sales	\$11.0 m	39
Scuba Diving Related Sales & Services	\$2.9 m	20
Cold Storage	\$3.7 m	14
Providoring/Supplies	\$10.0 m	40
Port Administration	\$49.0 m	102
Other Government	\$27 m	270
Fuel Supply	\$1 m	10
Education	\$1.6 m	16
Defence Contractors	\$6.7 m	67
<b>Total</b>	<b>\$122 m</b>	<b>618</b>

Comment: The region's geography leads to 7 seaports being recorded with Weipa and Cairns recording the largest tonnages. Apart from exports of minerals and primary products, Cairns is a major shipping port for cargoes to Cape and Torres Strait centres and the large Freeport mine in Papua Indonesia.

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*Source: Cummings Economics from Queensland Transport – Trade Statistics Report, 2008.*

## Marine Sector Seafreight, 2007/08 Far North Q'ld Ports

<b>Cairns</b>	<b>Outward</b>	<b>Inward</b>	<b>Total</b>
General cargo	180,844	43,964	224,808
Molasses	44,412	-	44,412
Petroleum products	27,741	550,447	578,188
Sugar	289,123	-	289,123
Crude fertilizers	-	41,354	41,354
LPG	-	18,719	18,719
<b>Cairns Total</b>	<b>542,120</b>	<b>654,484</b>	<b>1,196,604</b>

Cape Flattery	1,735,099	-	1,735,099
Karumba	1,070,927	-	1,070,927
Mourilyan	527,351	-	527,351
Quintell Beach	612	4,070	4,682
Thursday Island	77,875	-	77,875
Weipa	22,005,405	106,093	22,111,498
<b>Total</b>	<b>25,959,389</b>	<b>764,647</b>	<b>26,724,036</b>

Comment: The combined tonnages through the region's seaports at \$24m tonnes in 2006/07 are relatively high in national terms.

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*Source: Cummings Economics from Bureau of Infrastructure, Transport & Regional Economics.*

# Marine Sector

## Comparative Total Tonnages through Regional Seaports

Seaport Tonnages Loaded & Unloaded 2006/07 Selected Regions Compared	
Mackay Region	89 m tonnes
Fitzroy Region (includes Gladstone)	75 m tonnes
Brisbane/South East Queensland	28 m tonnes
Cairns/Far North Region	24 m tonnes
South Australia	22 m tonnes
Townsville/Northern Region	21 m tonnes
Northern Territory	17 m tonnes
Tasmania	16 m tonnes



# **Aviation Sector**

Comment: Total passenger movements at Cairns airport in 2008/09 came in at 3.84 million. In international passenger numbers, Cairns airport is ahead of Adelaide and is the 5<sup>th</sup> busiest international airport in Australia.

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*Source: Cummings Economics from Cairns Port Authority data and Department of Transport & Regional Services data.*

# Aviation Sector

## Cairns Airport Passenger Movements 2008/09 (incl transfers & transits)

International Terminal	738,134
Domestic Terminal	3,102,126
<b>Total</b>	<b>3,840,260</b>

## National Comparisons International Revenue Passenger Movements, Australian Airports, 2007/08

Sydney	10,560,840
Melbourne	4,662,037
Brisbane	3,984,835
Perth	2,477,820
<b>Cairns</b>	<b>655,919</b>
Adelaide	471,341
Gold Coast	261,092
Darwin	173,243

Comment: Cairns airport dominates airport activity in northern Australia by a very large margin.

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*Source: Cummings Economics from Department of Transport & Regional Services data.*

**Aviation Sector**  
**Comparative Passenger Statistics**  
**Northern Cities, 2007/08**

	<b>Domestic</b>	<b>International</b>	<b>Regional</b>	<b>Total</b>
<b>Cairns</b>	<b>2,772,098</b>	<b>655,919</b>	<b>349,137</b>	<b>3,777,154</b>
Darwin	1,285,135	173,243	103,838	1,562,216
Townsville	1,130,432	Nil	235,527	1,365,959
Rockhampton	452,340	Nil	237,902	690,242
Mackay	695,538	Nil	141,878	837,416



## Aviation Sector

### Estimated Turnover & Employment, 2007/08

	Turnover	Employment
Aircraft maintenance & Avionics	\$42 m	229
Regional Airlines, Charter & Aerial Aircraft Operations	\$111 m	704
Aviation support services	\$169 m	1,342
<b>Total</b>	<b>\$322 m</b>	<b>2,275</b>



# Road Transport



# Road Transport

## Far North Q'ld Statistical Division

### Motor Vehicle Census, 2006

Vehicle Type	Number
Motor cycles	7,996
Passenger	105,965
Light commercial	38,139
Trucks / Buses / Other	8,297
<b>Total</b>	<b>160,397</b>
<b>cf Motor vehicles on register, 2002</b>	<b>136,354</b>
<b>Average Annual Growth</b>	<b>4.1%</b>

### New Motor Vehicle Sales, 2006

Statistical Division	Passenger	Other	Total
<b>Far North</b>	<b>6,890</b>	<b>5,011</b>	<b>11,891</b>
Northern	5,018	4,949	9,969
Mackay	3,847	5,272	9,119
Fitzroy	4,967	6,395	11,352



# **Overseas Exports**



## Value of Overseas Exports Direct Via Ports in FNQ

	2004/05	2005/06	2006/07	2007/08	2008/09 (p)
<b>SEAPORTS</b>	\$m	\$m	\$m	\$m	\$m
<b>Cairns</b>	<b>310</b>	<b>361</b>	<b>397</b>	<b>353</b>	<b>346</b>
Mourilyan	150	255	204	132	219
Karumba	369	710	878	696	328
Weipa	104	102	146	206	157
Thursday I	1	1	-	-	2
Cape Flattery <i>(Est)(* )</i>	(27)*	(21)*	(27)*	(26)*	(21)*
<b>Subtotal</b>	<b>961*</b>	<b>1450*</b>	<b>1652*</b>	<b>1413*</b>	<b>1073*</b>
<b>AIRPORTS</b>					
<b>Cairns</b>	<b>137</b>	<b>134</b>	<b>120</b>	<b>130</b>	<b>182</b>
<b>Total</b>	<b>\$1,098m*</b>	<b>\$1,584m*</b>	<b>\$1,772m*</b>	<b>\$1,543m*</b>	<b>\$1,255m*</b>

Comment: Composition of overseas merchandise exports through Cairns Airport is the result of a mix of two main influences:

(1) Exports to distant markets like Japan and Hong Kong are dominated by fish products but also include hide and skins, natural medicinal products and other primary products.

(2) Exports by air to nearby markets, especially mines in PNG, include a wide range of manufactured items & parts including machinery, transport equipment and power generation equipment.

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*Source: Australian Bureau of Statistics, (unpublished data).*

## Composition of Merchandise Exports Cairns Airport 2008/09

<b>Primary Products &amp; Raw Materials</b>	<b>\$86m</b>
Fish Products	\$66.8m
Medicinal Products	\$7.3m
Hide & Skins	\$5.4m
Fruit & Vegetables	\$3.5m
Other Primary & Raw Material	\$3.0m
<b>Manufacture Incl. Parts</b>	<b>\$84.7m</b>
Transport Equipment	\$31.7m
Machinery Specialised	\$19.4m
Electrical Telecommunications	\$8.4m
Professional Scientific Equipment	\$8.4m
Office Machines	\$4.6m
Power Generation Machinery	\$4.1m
Other	\$8.1m
<b>Other</b>	<b>\$12.1m</b>
Special transactions & confidential	\$12.1m
<b>Total</b>	<b>\$182.80m</b>

Comment: Value of Merchandise Exports ex Far North Queensland seaports is dominated by three major influences:

- (1) Exports of minerals through the ports of Weipa, Karumba & Cape Flattery.
- (2) Bulk sugar exports ex Cairns and Mourilyan seaports.
- (3) General cargo exports ex Cairns to Freeport Indonesia's large copper and gold mine in Papua Indonesia, mainly of machinery, fuels, chemicals and other manufactures.

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*Source: ABS, (unpublished data) except Cape Flattery silica estimated.*

## Composition of Value of Merchandise Exports Far North Queensland Seaports\* 2008/09

<b>Minerals</b>		<b>\$498m</b>
<b>Primary Products</b>		<b>\$321m</b>
Sugar	\$298m	
Live Cattle	\$15m	
Other	\$8m	
<b>Manufacturers</b>		<b>\$246m</b>
Fuel Chemicals	\$44m	
Power Generator Machinery	\$24m	
Machinery & Parts Specialised	\$52m	
Road Vehicles & Parts	\$47m	
Other Machinery & Parts	\$49m	
Other Manufacturers	\$30m	
<b>Other (Unspecified)</b>		<b>\$9m</b>
<b>Total</b>		<b>\$1,073m</b>

*Note\*: Seaports of Cairns, Mourilyan, Thursday I, Weipa, Karumba & Cape Flattery estimate.*



# **Recent Relevant Price Trends**

Comment: Domestic airfares have moved downwards during 2009 to a highly favourable position for the region's tourism.

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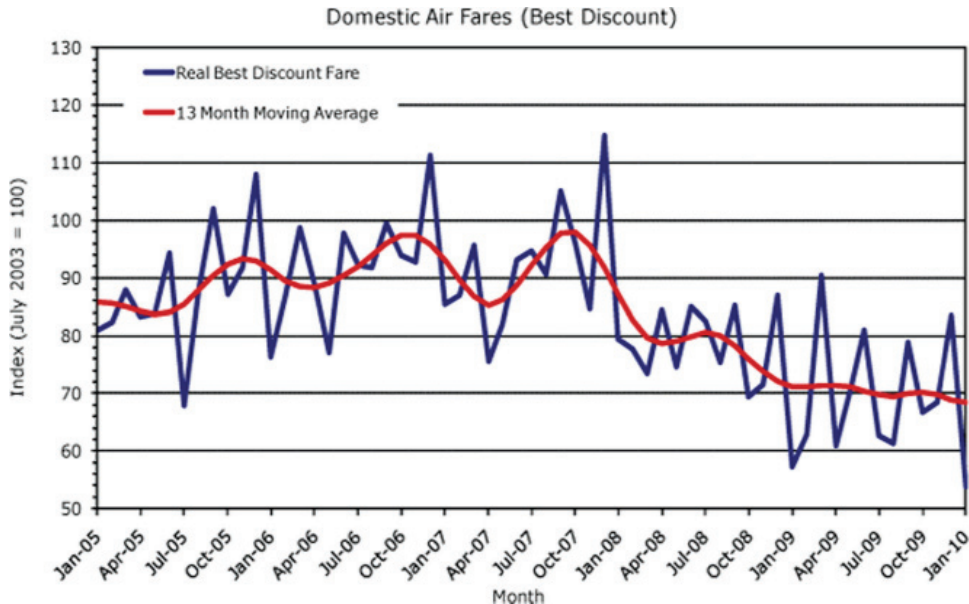
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*Source: Bureau of Infrastructure, Transport & Regional Economics, Domestic Airfare Index.*

# Domestic Airfares

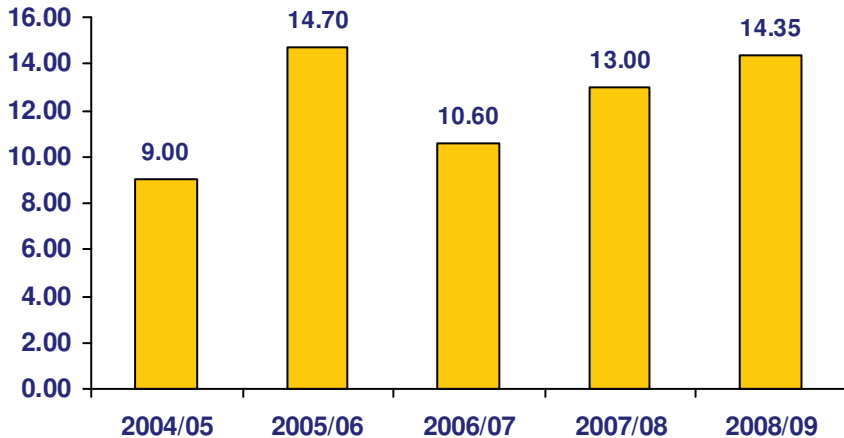




# Sugar Prices

US / Cents

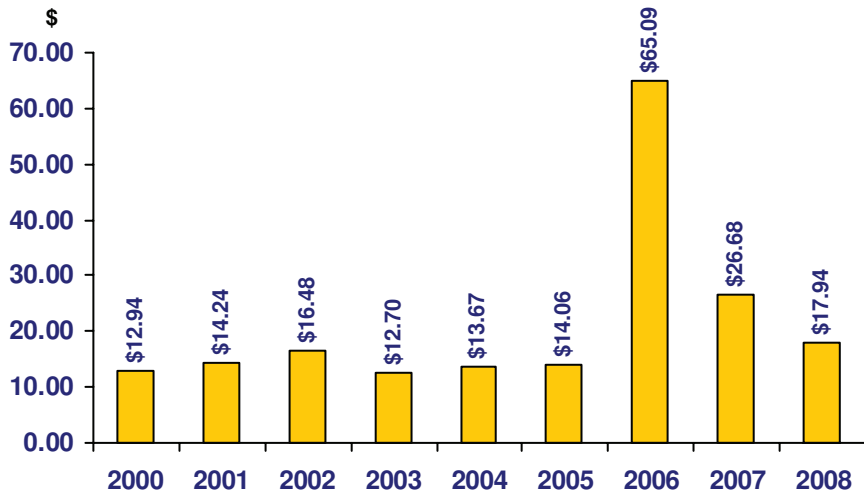
per lb





# Banana Prices

## Average Annual Price per Carton Cavendish Brisbane Markets



Comment: Although Queensland cattle prices are down on the high of 2005, the drop is only 10% and they remain high in historical terms.

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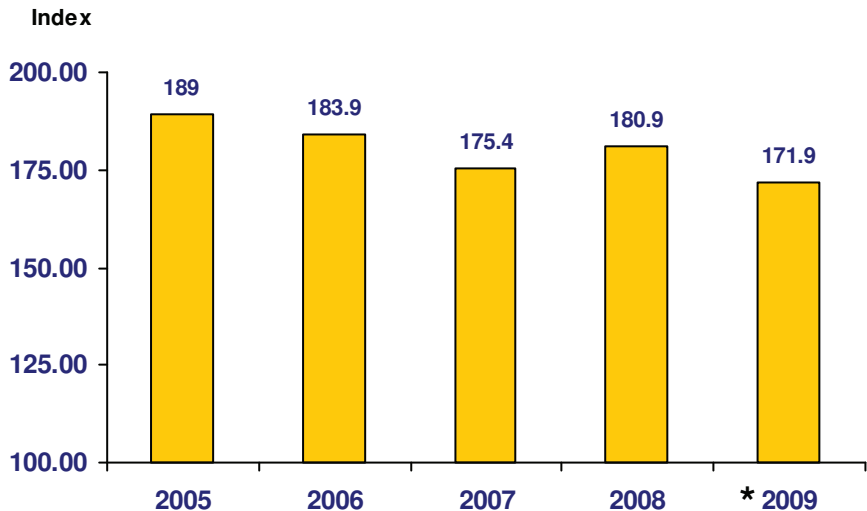
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*Source: Meat & Livestock Australia, Q'ld Cattle Market Index.*

# Queensland Cattle Market Index



\* Year to August 2009



# Mineral Prices







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