

## 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in 2011 and their impact on surveying for the National Visitor Survey (NVS), **domestic tourism region** data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011.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.

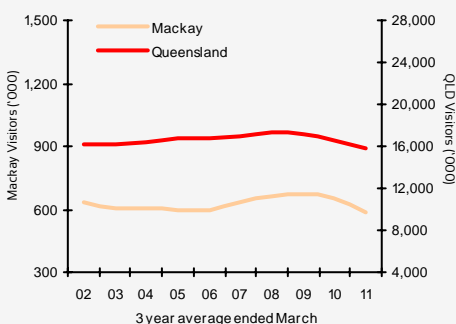
National and state level NVS data will be published as normal on a year ended basis.

Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.

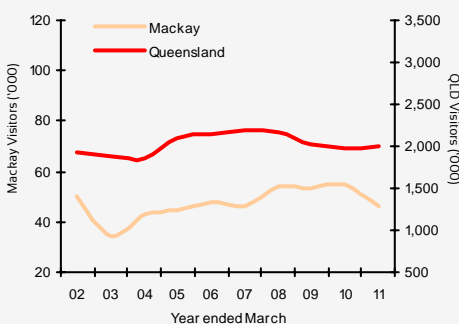


	Visitors	Holiday	VFR	Business
Domestic overnight 3 year average	588,000	157,000	164,000	234,000
Trend change <sup>1</sup>	▼ -10%	▼ -22%	▼ -4%	▼ -6%
International overnight	46,000	35,000	8,000	n/p
Annual change <sup>2</sup>	▼ -16%	▼ -17%	▼ -20%	n/p
Trend change	▼ -5%	▼ -6%	▲ 4%	n/p

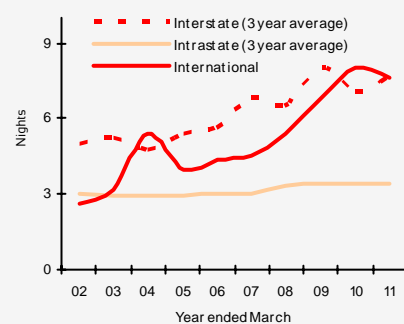
### Domestic visitation



### International visitation



### Average length of stay (Mackay)



- Mackay had declines in domestic visitors over the three years to March 2011. The region is yet to fully recover from the impact of the Global Financial Crisis (GFC). Whilst not reflected in the trend data, the recovery in domestic visitation during 2010 was not sustained following the 2010/2011 floods.

- Intrastate holiday's declined affected by the GFC and decreased accessibility associated with the weather events. This follows the trend seen at the state level.

- Although the important business sector had recovered to pre-GFC levels during 2010, the weather events saw the market ease once more, resulting in an overall decline during the three years to March 2011.

- In a continuation of recent trends, the Mackay region saw a decline from key European markets during the year ended March 2011. Many economies in Europe, including those in the United Kingdom (UK) are yet to rebound from the GFC.

- The youth market (under 30 years) drove the declines in travel from the UK to Australia, Queensland and Mackay. This market has been impacted heavily by youth unemployment and a strong Aussie dollar.

- The Mackay region experienced an increase in visitors from other European countries (excluding UK & Germany) which is in contrast to the declines experienced by Queensland overall.

- The average length of stay for domestic visitors to Mackay has remained positive in the three years to March 2011, with both intrastate and interstate holiday visitors increasing their length of stay in the region.

- Despite this, domestic business visitors have reduced their length of stay in Mackay over the last three years.

- On average, international holiday visitors spent 4.8 nights in the Mackay region in the year to March 2011, an increase of 0.9 nights. This increased average stay was from youth visitors coming to the region for a working holiday.

### Tourist Accommodation<sup>3</sup>

	Hotels/Motels/Serviced apartments <sup>4</sup>
Guest arrivals	363,000
Annual change	1%
Room occupancy	67.5%
Percentage point change	2.0%
Average room rate	\$154.19
Annual change	3%
Yield <sup>5</sup>	\$104.12
Annual change	6%

- In the year ending March 2011, guest arrivals to Mackay's commercial accommodation sector increased slightly by 1%.

- Room occupancy rose by 2.0 percentage points on the previous year. Reflecting the recovery in demand, there were modest increases in the average room rate (up 3%) and yield (up 6%).

For more information on commercial accommodation for the region, please refer to the 'Tourist Accommodation Data Sheet' available on the Tourism Queensland website.

The data included in this report is sourced from the National and International Visitor surveys conducted by Tourism Research Australia. These large and comprehensive surveys 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

### Domestic visitors to Mackay 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
<b>Holiday</b>	157,000	-22%	704,000	-12%	4.5	0.5
<b>VFR</b>	164,000	-4%	833,000	-6%	5.1	-0.1
<b>Business</b>	234,000	-6%	759,000	-11%	3.2	-0.2
<b>Total<sup>6</sup></b>	588,000	-10%	2,388,000	-9%	4.1	0.1
<b>Intrastate</b>						
<b>Holiday</b>	120,000	-25%	378,000	-16%	3.2	0.3
<b>VFR</b>	135,000	-3%	632,000	-4%	4.7	-0.1
<b>Business</b>	218,000	-4%	634,000	-13%	2.9	-0.3
<b>Total</b>	497,000	-10%	1,696,000	-11%	3.4	0.0
<b>Interstate</b>						
<b>Holiday</b>	37,000	-12%	326,000	-7%	8.8	0.5
<b>Total</b>	91,000	-11%	692,000	-4%	7.6	0.5

### Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
<b>Mackay<sup>7</sup></b>	680,000	5%	n/p	n/p
<b>Queensland</b>	34,258,000	7%	\$3,627	7%
<b>Australia</b>	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 Mackay 3 year average to March 2011

<b>Total visitors</b>	Visitors	Trend % change	Nights	Trend % change
<b>Regional Qld</b>	395,000	-15%	1,346,000	-15%
<b>Brisbane</b>	101,000	13%	351,000	7%

### State comparison - Domestic

<b>Total visitors</b>	Visitors	Annual % change	Nights	Annual % change
<b>Queensland</b>	16,037,000	3%	67,025,000	-4%
<b>NSW</b>	23,505,000	4%	79,124,000	3%
<b>Victoria</b>	16,084,000	1%	49,663,000	-1%
<b>Rest of Aus</b>	14,251,000	1%	61,230,000	2%
<b>Australia</b>	67,605,000	2%	257,042,000	0%
<b>Holiday visitors</b>				
<b>Queensland</b>	6,914,000	-1%	33,885,000	-3%
<b>NSW</b>	10,203,000	-1%	38,833,000	2%
<b>Victoria</b>	7,504,000	0%	25,048,000	-1%
<b>Rest of Aus</b>	6,168,000	-2%	28,744,000	-1%
<b>Australia</b>	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.



## International visitation Year ended March 2011

### International visitors to Mackay

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	35,000	-17%	167,000	1%	4.8	0.9
VFR	8,000	-20%	114,000	-21%	14.1	0.0
<b>Total<sup>a</sup></b>	<b>46,000</b>	<b>-16%</b>	<b>350,000</b>	<b>-20%</b>	<b>7.6</b>	<b>-0.4</b>

### Key international source markets to Mackay

	Visitors	Annual % change	Nights	Annual % change
<b>Total visitors</b>				
Europe (ex. UK and Germany)	17,000	13%	75,000	34%
United Kingdom	7,000	n/p	47,000	n/p
Germany	7,000	n/p	23,000	n/p
New Zealand	6,000	n/p	91,000	-n/p



### State comparison - International

	Visitors	Annual % change	Nights	Annual % change
<b>Total visitors</b>				
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 <sup>a</sup>	5,396,000	4%	186,600,000	3%
<b>Holiday visitors</b>				
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 <sup>a</sup>	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](http://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](mailto:research@tq.com.au)

Mackay region includes Mackay and Isaac Regional Council areas.

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Year ended December 2010

## 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%
<b>Mackay</b>	<b>588,000</b>	<b>-10%</b>	<b>2,388,000</b>	<b>-9%</b>	<b>4.1</b>	<b>0.1</b>	<b>27%</b>	<b>28%</b>	<b>40%</b>	<b>4%</b>
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%
<b>Total</b>	<b>15,876,000</b>	<b>-5%</b>	<b>68,430,000</b>	<b>-5%</b>	<b>4.3</b>	<b>0.0</b>	<b>44%</b>	<b>32%</b>	<b>20%</b>	<b>-</b>

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%
<b>Mackay</b>	<b>46,000</b>	<b>-16%</b>	<b>350,000</b>	<b>-20%</b>	<b>7.6</b>	<b>-0.4</b>	<b>76%</b>	<b>17%</b>	<b>7%</b>	<b>2%</b>
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%
<b>Total</b>	<b>2,002,000</b>	<b>1%</b>	<b>39,474,000</b>	<b>-1%</b>	<b>19.7</b>	<b>-0.5</b>	<b>69%</b>	<b>25%</b>	<b>9%</b>	<b>-</b>

**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. Tourist accommodation figures refer to the Mackay tourism region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation March 2011.

4. Figures provided refer to hotels/motels/serviced apartments with fifteen or more rooms.

5. Yield refers to average takings per room night available.

6. This figure includes "Other" visitors.

7. 3 year average ended March 2011.

8. This figure includes "Business" and "Other" visitors

9. Excludes Transit visitors who did not have a stopover place.

n/p not published.