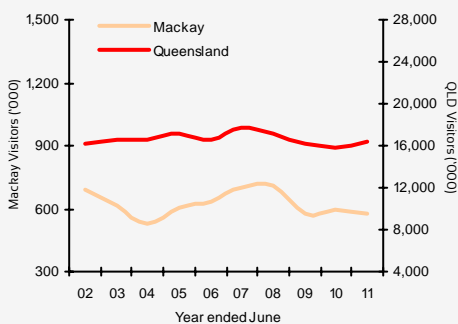


Year ended June 2011



	Visitors	Holiday	VFR	Business
Domestic overnight	575,000	145,000	163,000	213,000
Annual change ¹	▼ -4%	▲ 1%	▲ 13%	▼ -22%
Trend change ²	▼ -7%	▼ -25%	▼ -1%	● 0%
International overnight	46,000	34,000	9,000	n/p
Annual change	▼ -12%	▼ -15%	▼ -18%	n/p
Trend change	▼ -4%	▼ -7%	▲ 11%	n/p
TOTAL	621,000	179,000	172,000	n/p
Annual change	▼ -4%	▼ -3%	▲ 11%	n/p

Domestic visitation

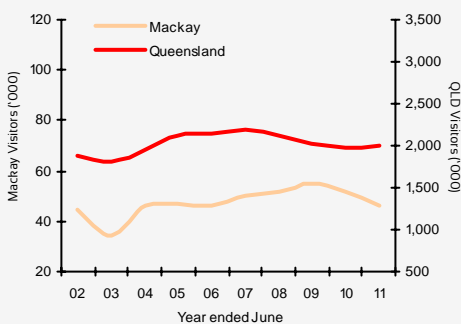


- Domestic visitation to Mackay softened over the last year, the result of a decline in business travellers which is in contrast to the state trend. However, the expanding resources sector helped fuel an increase in Brisbane residents travelling to Mackay for business.

- Business travel remains a key reason for domestic visitors travelling to Mackay, with 37% stating business as their main purpose for visiting the region.

- Regional QLD remained the region's key source of domestic visitors over the last year, representing 63% of visitors to Mackay. This source market declined, most likely due to the 2010/2011 floods and cyclones that reduced accessibility to the region.

International visitation



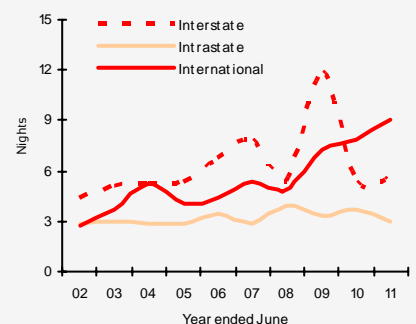
- Mackay recorded a decline in international visitors, driven by holiday and VFR (visiting friends and relatives).

- Like many QLD regions, Mackay recorded a decline in visitors from the United Kingdom (UK), which continues to endure poor economic conditions and high youth unemployment.

- Mackay also saw a decline in visitation from New Zealand, again mirroring declines seen in many Queensland regions after the Christchurch earthquake.

- Mackay saw a more noted downturn in international visitation than that of Queensland, with declines from Europe not being offset by growth from Asian markets such as China.

Average length of stay (Mackay)



- Mackay's international visitors' length of stay increased by 1.2 nights, driven by visitors from the UK who increased their average stay by 4.7 nights in the region. Holiday visitors also increased their stay by 1.9 nights on average.

- Interstate visitors increased their average length of stay, while intrastate visitors reduced their average stay in the region by 0.7 nights. This intrastate decline was the result of Brisbane residents reducing the length of their stay in Mackay.

- Domestic VFR visitors reduced their average stay by 1.8 nights, with the average stay of domestic holiday and business visitors declining only marginally.

Tourist Accommodation³

	Hotels/Motels/Service apartments ⁴
Guest arrivals	357,000
Annual change	-2%
Room occupancy	69.2%
Percentage point change	4.2%
Average room rate	\$155
Annual change	3%
Yield⁵	\$108
Annual change	9%

- Overall visitation to Mackay declined by 4% in the year ending June 2011. Similarly, the commercial accommodation sector recorded a decline of 2% in guest arrivals.

- Despite this, there were increases in room occupancy, average room rates and yield, reflecting a decline in hotel establishments. This reduced supply has benefited the more resilient establishments.

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

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statsonq@tq.com.au

Domestic visitation Year ended June 2011

Domestic visitors to Mackay

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	145,000	1%	460,000	-9%	3.2	-0.3
VFR	163,000	13%	573,000	-25%	3.5	-1.8
Business	213,000	-22%	768,000	-24%	3.6	-0.1
Total⁶	575,000	-4%	1,982,000	-16%	3.4	-0.6
Intrastate						
Holiday	117,000	4%	280,000	-18%	2.4	-0.6
VFR	125,000	6%	382,000	-40%	3.1	-2.3
Business	194,000	-25%	677,000	-24%	3.5	0.0
Total	478,000	-7%	1,439,000	-25%	3.0	-0.7
Interstate						
Holiday	28,000	-13%	179,000	7%	6.5	1.3
Total	97,000	15%	543,000	22%	5.6	0.3

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Mackay	700,000	-19%	n/p	n/p
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 Mackay

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	363,000	-16%	1,111,000	-22%
Brisbane	115,000	40%	328,000	-33%

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				
	Visitors	Annual % change	Nights	Annual % change
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 Mackay

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	34,000	-15%	195,000	24%	5.8	1.9
VFR	9,000	-18%	131,000	-17%	15.2	0.5
Total⁷	46,000	-12%	420,000	3%	9.1	1.2

Key international source markets to Mackay

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK and Germany)	15,000	-6%	86,000	34%
Germany	8,000	0%	36,000	89%
United Kingdom	7,000	-30%	78,000	22%
New Zealand	6,000	-25%	100,000	-17%

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				
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

Mackay region includes Mackay and Isaac Regional Council areas.

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.



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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. Tourist accommodation figures refer to the Mackay region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation December 2010.

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. This figure includes "Business" and "Other" visitors.
n/p not published.