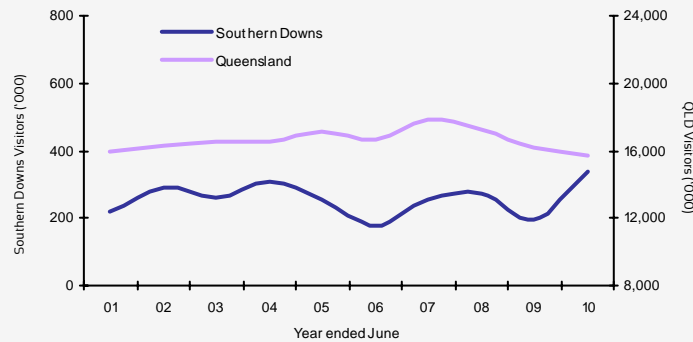


Year ended June 2010

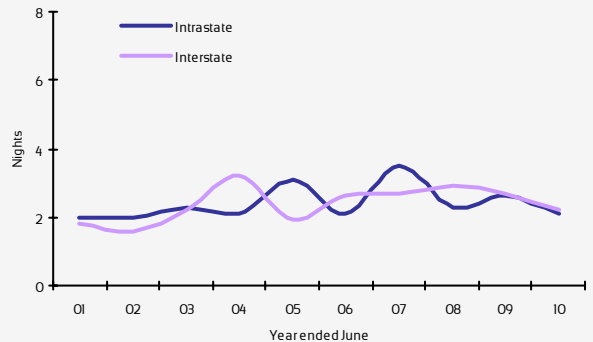


|                           | Visitors       | Holiday    | VFR        | Business   |
|---------------------------|----------------|------------|------------|------------|
| Domestic overnight        | 338,000        | 169,000    | 110,000    | n/p        |
| Trend change <sup>1</sup> | ▲ 12%          | ▲ 11%      | ▲ 9%       | n/p        |
| International overnight   | 9,000          | n/p        | n/p        | n/p        |
| Trend change              | ▼ -7%          | n/p        | n/p        | n/p        |
| <b>TOTAL</b>              | <b>347,000</b> | <b>n/p</b> | <b>n/p</b> | <b>n/p</b> |
| Trend change              | ▲ 11%          | n/p        | n/p        | n/p        |

Domestic visitation



Average length of stay (Southern Downs)



- In contrast to the state trend, domestic visitation to the Southern Downs increased over the three years to June 2010. Driving this trend was a return of holiday and VFR (visiting friends or relatives) visitors.
- The Southern Downs enjoyed growth from the Brisbane holiday market, where the trend towards more affordable short break trips (a trend seen across the state) continued to bode well for the region.

- The average length of stay of interstate and intrastate visitors to the Southern Downs dropped by 0.5 nights respectively over the year ended June 2010.
- The Southern Downs sits firmly within the short break category of 2 to 3 nights, recording only a marginal difference between holiday, VFR and business visitor length of stay.
- Domestic holidaymakers (comprising of half the domestic market to the region) reduced their length of stay to average 2.1 nights over the year.

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

|                            | Hotels/Motels/Serviced apartments <sup>4</sup> |
|----------------------------|--|
| Guest arrivals             | 92,932   |
| Annual change <sup>2</sup> | -3%  |
| Room occupancy             | 44.5%  |
| Percentage point change    | 0.6%   |
| Average room rate          | \$103.51                                       |
| Annual change              | -2%  |
| Yield <sup>5</sup>         | \$46.01  |
| Annual change              | 0%   |

■ Guest arrivals in hotels/motels/serviced apartments in the Southern Downs region declined by 3% in the year ending June 2010.

■ In contrast, visitation increased by 11% to the region (on a trend basis), suggesting that an increased number of visitors stayed in non commercial accommodation (such as commercial caravan and camping grounds or with friends or relatives).

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 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.

### Stats on Q are you subscribed?

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statsonq@tq.com.au

## Domestic and international visitation Year ended June 2010

### Domestic visitors to Southern Downs

|                          | Visitors       | Trend % change | Nights         | Trend % change | Length of stay | Nights change |
|--------------------------|----------------|----------------|----------------|----------------|----------------|---------------|
| Holiday                  | 169,000        | 11%            | 359,000        | 6%             | 2.1            | -0.8          |
| VFR                      | 110,000        | 9%             | 243,000        | 1%             | 2.2            | 0.0           |
| <b>Total<sup>6</sup></b> | <b>338,000</b> | <b>12%</b>     | <b>715,000</b> | <b>-7%</b>     | <b>2.1</b>     | <b>-0.5</b>   |
| <b>Intrastate</b>        |                |                |                |                |                |               |
| Holiday                  | 144,000        | 13%            | 311,000        | 7%             | 2.2            | -0.7          |
| VFR                      | 95,000         | 14%            | 199,000        | 7%             | 2.1            | 0.1           |
| Total                    | 293,000        | 16%            | 618,000        | -5%            | 2.1            | -0.5          |
| <b>Interstate</b>        |                |                |                |                |                |               |
| Total                    | 44,000         | -8%            | 97,000         | -13%           | 2.2            | -0.5          |

### State comparison - Domestic

| Total visitors          | Visitors   | Trend % change | Nights      | Trend % change |
|-------------------------|------------|----------------|-------------|----------------|
| Queensland              | 15,726,000 | -4%            | 70,814,000  | -3%            |
| NSW                     | 22,896,000 | -2%            | 76,966,000  | -3%            |
| Victoria                | 15,942,000 | -2%            | 50,255,000  | -2%            |
| Rest of Aus             | 14,151,000 | -5%            | 60,694,000  | -6%            |
| Australia               | 66,404,000 | -3%            | 258,729,000 | -3%            |
| <b>Holiday visitors</b> |            |                |             |                |
| Queensland              | 7,017,000  | -4%            | 34,643,000  | -4%            |
| NSW                     | 10,465,000 | 0%             | 38,523,000  | -2%            |
| Victoria                | 7,500,000  | -1%            | 25,058,000  | 0%             |
| Rest of Aus             | 6,332,000  | -4%            | 29,114,000  | -6%            |
| Australia               | 30,252,000 | -2%            | 127,338,000 | -3%            |

### International visitors to Southern Downs

|                          | Visitors     | Trend % change | Nights         | Trend % change | Length of stay | Nights change |
|--------------------------|--------------|----------------|----------------|----------------|----------------|---------------|
| <b>Total<sup>7</sup></b> | <b>9,000</b> | <b>-7%</b>     | <b>104,000</b> | <b>-10%</b>    | <b>11.5</b>    | <b>n/p</b>    |

### State comparison - International

| Total visitors          | Visitors  | Trend % change | Nights      | Trend % change |
|-------------------------|-----------|----------------|-------------|----------------|
| Queensland              | 1,970,000 | -3%            | 39,011,000  | 3%             |
| NSW                     | 2,782,000 | -1%            | 63,241,000  | 3%             |
| Victoria                | 1,548,000 | 2%             | 40,950,000  | 9%             |
| Rest of Aus             | 1,348,000 | 0%             | 38,937,000  | 6%             |
| Australia               | 5,232,000 | 1%             | 182,139,000 | 5%             |
| <b>Holiday visitors</b> |           |                |             |                |
| Queensland              | 1,415,000 | -4%            | 18,643,000  | 0%             |
| NSW                     | 1,569,000 | -3%            | 21,311,000  | 4%             |
| Victoria                | 752,000   | -2%            | 8,497,000   | 2%             |
| Rest of Aus             | 735,000   | -4%            | 12,025,000  | 1%             |
| Australia               | 2,826,000 | -2%            | 60,475,000  | 2%             |

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)

The Southern Downs region includes Stanthorpe and Warwick.



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Year ended June 2010

## Domestic Regional Comparison

|                       | Visitors          | Trend % change | Nights            | Trend % change | Length of stay | Nights change | Holiday %  | VFR %      | Business % | % Share of visitors to QLD |
|-----------------------|-------------------|----------------|-------------------|----------------|----------------|---------------|------------|------------|------------|----------------------------|
| Brisbane              | 4,260,000         | -8%            | 13,639,000        | -7%            | 3.2            | 0.0           | 27%        | 40%        | 26%        | 27%                        |
| Gold Coast            | 3,270,000         | 3%             | 13,898,000        | 4%             | 4.2            | 0.0           | 64%        | 26%        | 8%         | 21%                        |
| Sunshine Coast        | 2,439,000         | -6%            | 10,602,000        | 3%             | 4.3            | 0.3           | 61%        | 32%        | 5%         | 16%                        |
| SEQC <sup>8</sup>     | 2,408,000         | 3%             | 6,789,000         | 1%             | 2.8            | -0.1          | 38%        | 44%        | 13%        | 15%                        |
| TNQ                   | 1,412,000         | -7%            | 7,751,000         | 7%             | 5.5            | 0.7           | 55%        | 27%        | 16%        | 9%                         |
| Central Queensland    | 1,128,000         | 13%            | 4,496,000         | 28%            | 4.0            | 0.5           | 37%        | 30%        | 26%        | 7%                         |
| Toowoomba             | 1,047,000         | 6%             | 3,373,000         | 22%            | 3.2            | 0.4           | 32%        | 41%        | 20%        | 7%                         |
| Capricorn             | 832,000           | 12%            | 3,582,000         | 48%            | 4.3            | 1.0           | 37%        | 25%        | 29%        | 5%                         |
| Townsville            | 787,000           | -8%            | 3,332,000         | 13%            | 4.2            | 0.8           | 31%        | 26%        | 30%        | 5%                         |
| Fraser Coast          | 752,000           | -11%           | 2,673,000         | -26%           | 3.6            | -0.6          | 47%        | 33%        | 14%        | 5%                         |
| Mackay                | 597,000           | 3%             | 2,367,000         | -12%           | 4.0            | -0.7          | 24%        | 24%        | 46%        | 4%                         |
| Bundaberg             | 524,000           | 8%             | 1,959,000         | 11%            | 3.7            | 0.1           | 32%        | 39%        | 15%        | 3%                         |
| Whitsundays           | 463,000           | 14%            | 2,131,000         | 25%            | 4.6            | 0.4           | 68%        | 15%        | 12%        | 3%                         |
| Outback               | 364,000           | n/p            | 2,070,000         | n/p            | 5.7            | 1.1           | 32%        | 17%        | 43%        | 2%                         |
| <b>Southern Downs</b> | <b>338,000</b>    | <b>n/p</b>     | <b>715,000</b>    | <b>n/p</b>     | <b>2.1</b>     | <b>-0.5</b>   | <b>50%</b> | <b>33%</b> | <b>16%</b> | <b>2%</b>                  |
| Gladstone             | 334,000           | 27%            | 1,326,000         | 37%            | 4.0            | 0.3           | 39%        | 40%        | 16%        | 2%                         |
| Western Downs         | 293,000           | n/p            | 844,000           | n/p            | 2.9            | -0.2          | 33%        | 31%        | 28%        | 2%                         |
| <b>Total</b>          | <b>15,726,000</b> | <b>-2%</b>     | <b>70,814,000</b> | <b>5%</b>      | <b>4.5</b>     | <b>0.3</b>    | <b>45%</b> | <b>33%</b> | <b>19%</b> | <b>-</b>                   |

## International Regional Comparison

|                       | Visitors         | Trend % change | Nights            | Trend % change | Length of stay | Nights change | Holiday %  | VFR %      | Business % | % Share of visitors to QLD |
|-----------------------|------------------|----------------|-------------------|----------------|----------------|---------------|------------|------------|------------|----------------------------|
| Brisbane              | 901,000          | -2%            | 15,814,000        | -2%            | 17.5           | 0.0           | 54%        | 29%        | 12%        | 46%                        |
| Gold Coast            | 826,000          | 5%             | 8,054,000         | 4%             | 9.8            | 0.0           | 79%        | 15%        | 4%         | 42%                        |
| TNQ                   | 654,000          | -7%            | 6,091,000         | -7%            | 9.3            | -0.1          | 91%        | 4%         | 2%         | 33%                        |
| Sunshine Coast        | 280,000          | 1%             | 2,496,000         | 7%             | 8.9            | 0.5           | 80%        | 18%        | 2%         | 14%                        |
| Whitsundays           | 213,000          | -2%            | 1,153,000         | -15%           | 5.4            | -0.8          | 97%        | 2%         | 1%         | 11%                        |
| Fraser Coast          | 181,000          | -8%            | 797,000           | -7%            | 4.4            | 0.1           | 94%        | 6%         | 1%         | 9%                         |
| Townsville            | 138,000          | -6%            | 1,421,000         | 7%             | 10.3           | 1.3           | 80%        | 13%        | 4%         | 7%                         |
| Central Queensland    | 125,000          | -1%            | 1,111,000         | 4%             | 8.9            | 0.5           | 86%        | 10%        | 4%         | 6%                         |
| SEQC <sup>8</sup>     | 118,000          | 0%             | 1,975,000         | -15%           | 16.8           | -2.8          | 42%        | 50%        | 6%         | 6%                         |
| Capricorn             | 77,000           | -8%            | 690,000           | 4%             | 8.9            | 1.0           | 86%        | 10%        | 4%         | 4%                         |
| Gladstone             | 64,000           | 14%            | 421,000           | 4%             | 6.6            | -0.6          | 89%        | 6%         | 3%         | 3%                         |
| Mackay                | 52,000           | -5%            | 409,000           | 1%             | 7.9            | 0.6           | 77%        | 21%        | 4%         | 3%                         |
| Bundaberg             | 42,000           | -14%           | 646,000           | 0%             | 15.3           | 2.2           | 83%        | 14%        | 0%         | 2%                         |
| Toowoomba             | 33,000           | -11%           | 613,000           | 4%             | 18.4           | 2.3           | 48%        | 33%        | 9%         | 2%                         |
| Outback               | 25,000           | n/p            | 302,000           | n/p            | 11.8           | -3.1          | 88%        | 8%         | 4%         | 1%                         |
| Western Downs         | 10,000           | n/p            | 151,000           | n/p            | 15.2           | n/p           | 70%        | 20%        | 10%        | 1%                         |
| <b>Southern Downs</b> | <b>9,000</b>     | <b>n/p</b>     | <b>104,000</b>    | <b>n/p</b>     | <b>11.5</b>    | <b>n/p</b>    | <b>78%</b> | <b>22%</b> | <b>0%</b>  | <b>0%</b>                  |
| <b>Total</b>          | <b>1,970,000</b> | <b>-2%</b>     | <b>39,011,000</b> | <b>-2%</b>     | <b>19.8</b>    | <b>0.0</b>    | <b>72%</b> | <b>24%</b> | <b>8%</b>  | <b>-</b>                   |

Data sources: National & International Visitor Surveys, Tourism Research Australia.

1. Trend change refers to the percentage change between the 3 years to June 2009 vs. the 3 years to June 2010.

2. Annual change refers to the percentage change between the year ended June 2010 vs. year ended June 2009.

3. Tourist accommodation figures refer to the Southern Downs region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation June 2010.

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

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

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

7. This figure includes "Holiday", "VFR", "Business" and "Other" visitors.

8. South East Queensland Country.

n/p - not published.