

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in 2011 and their impact on surveying for the National Visitor Survey (NVS), **domestic tourism region** data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011.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

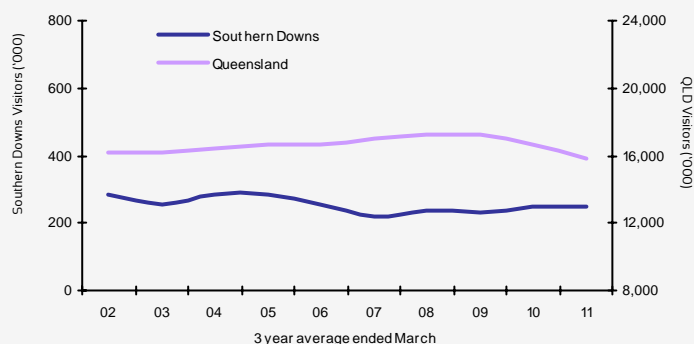
National and state level NVS data will be published as normal on a year ended basis.

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	247,000	129,000	77,000	33,000
Trend change ¹	● 0%	▲ 2%	▲ 1%	▼ -6%
International overnight	10,000	n/p	n/p	n/p
Trend change	▼ -8%	n/p	n/p	n/p

Domestic visitation

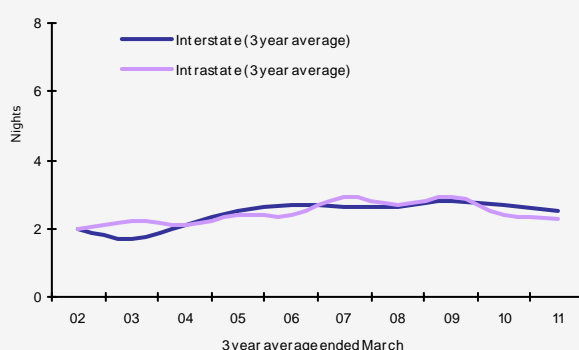


- Domestic visitation to the Southern Downs region remained stable over the three years to March 2011. As a result, the region had a better performance than the Queensland average.

- Despite experiencing a decline in business visitation (driven by the intrastate market), the Southern Downs' results were boosted by interstate holiday and intrastate VFR visitors.

- The Southern Downs is typically a short break destination with 71% of domestic visitors to the region travelling for 3 nights or less on their trip. This market has increased 8% over the three years to March 2011, contributing to the relatively good performance of the region.

Average length of stay (Southern Downs)



- Domestic visitors average length of stay to Southern Downs declined slightly over the three years to March 2011, resulting in total nights spent in the region decreasing moderately.

- Holiday and VFR (visiting friends and relatives) markets slightly increased their average stay in the Southern Downs region.

- Interstate holiday visitors' length of stay slipped slightly to an average of around 2.2 nights in the three years to March 2011.

- Intrastate holidaymakers (who accounted for 84% of all holiday visitors to the region) increased their average stay modestly, staying an average of 2.6 nights.

Tourist Accommodation²

	Hotels/Motels/Serviced apartments ³
Guest arrivals	72,000
Annual change ⁴	-6%
Room occupancy	46.0%
Percentage point change	1.1%
Average room rate	\$94.50
Annual change	-1%
Yield ⁵	\$43.43
Annual change	2%

- In the year ending March 2011, the commercial accommodation sector in the Southern Downs recorded a 6% decline in guest arrivals.

- Despite this, room occupancy increased slightly by 1.1 percentage points, suggesting guests are staying longer on average.

- Whilst the average room rate declined slightly (down 1%), yield increased moderately (up 2%).

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 and international visitation

Domestic visitors to Southern Downs 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	129,000	2%	323,000	6%	2.5	0.1
VFR	77,000	1%	189,000	3%	2.5	0.0
Total⁵	247,000	0%	586,000	-4%	2.4	-0.1
Intrastate						
Holiday	108,000	-1%	280,000	5%	2.6	0.2
VFR	62,000	9%	135,000	6%	2.2	-0.1
Total	203,000	0%	475,000	-3%	2.3	-0.1
Interstate						
Total	44,000	0%	111,000	-5%	2.5	-0.1

State comparison Domestic year ended March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Queensland	16,037,000	3%	67,025,000	-4%
NSW	23,505,000	4%	79,124,000	3%
Victoria	16,084,000	1%	49,663,000	-1%
Rest of Aus	14,251,000	1%	61,230,000	2%
Australia	67,605,000	2%	257,042,000	0%
Holiday visitors				
Queensland	6,914,000	-1%	33,885,000	-3%
NSW	10,203,000	-1%	38,833,000	2%
Victoria	7,504,000	0%	25,048,000	-1%
Rest of Aus	6,168,000	-2%	28,744,000	-1%
Australia	29,676,000	-1%	126,510,000	-1%

International visitors to Southern Downs year ended March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Total⁶	10,000	-8%	205,000	6%	20.0	0.6

State comparison - International

Total visitors	Visitors	Trend % change	Nights	Trend % change
Queensland	2,002,000	-3%	39,474,000	1%
NSW	2,829,000	0%	66,266,000	5%
Victoria	1,693,000	5%	40,628,000	9%
Rest of Aus	1,394,000	1%	40,232,000	6%
Australia ⁷	5,396,000	1%	186,600,000	5%
Holiday visitors				
Queensland	1,379,000	-5%	17,804,000	-1%
NSW	1,573,000	-2%	20,642,000	3%
Victoria	810,000	1%	7,910,000	-1%
Rest of Aus	755,000	-1%	11,414,000	1%
Australia ⁷	2,866,000	-1%	57,770,000	1%

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

The Southern Downs region includes Stanthorpe and Warwick.

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Regional Visitation

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

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

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

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

4. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.

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

6. This figure includes "Other" visitors.

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

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

n/p not published.