

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in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011.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

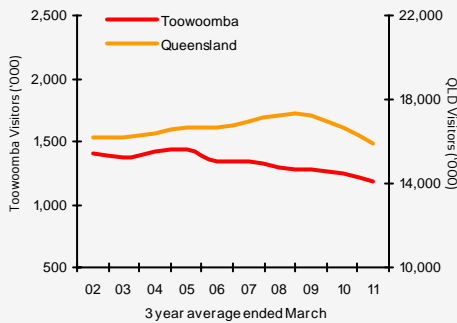
National and state level NVS data will be published as normal on a year ended basis.

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

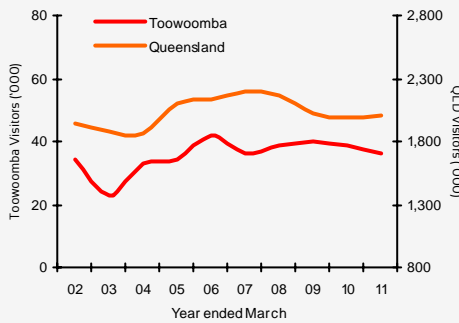


	Visitors	Holiday	VFR	Business
Domestic overnight 3 year average	1,186,000	373,000	483,000	245,000
Trend change <sup>1</sup>	▼ -5%	● 0%	▼ -7%	▼ -10%
International overnight	36,000	16,000	12,000	n/p
Annual change <sup>2</sup>	▼ -8%	▼ -20%	▼ -14%	n/p
Trend change	▼ -3%	▼ -5%	▼ -2%	n/p

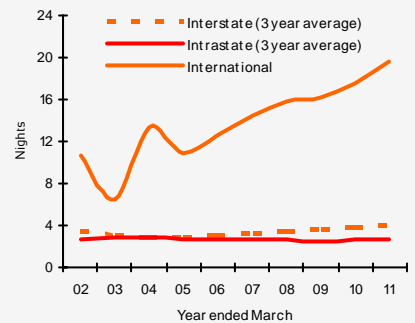
### Domestic visitation



### International visitation



### Average length of stay (Toowoomba)



- The Toowoomba region saw an overall decrease in domestic visitation over the three years to March 2011. This downturn was driven by both the business and VFR (visiting friends and relatives) markets.

- While remaining stable overall, the holiday market experienced growth from locals and neighbouring regions, including those from regional NSW. Over the three years to March 2011, the number of intrastate holiday-makers taking a short break (1-3 nights) in the Toowoomba region increased by 4%.

- Despite this upward trend, those Queenslanders taking a short break for VFR declined, with this form of travel clearly being impacted most by recent weather events.

- International visitation to the Toowoomba region declined over the year, for both the holiday and VFR markets, particularly from New Zealand (the region's largest source of international visitors).

- In contrast to the state trend, visitation from the United Kingdom (UK) and Europe remained stable, with the declines in the youth market (under 30 years) being offset by older visitors (30 years and over).

- The declines in the important youth market reflected in the Toowoomba visitor numbers was a trend seen in most Queensland regions.

- International visitors' average length of stay in Toowoomba continued to climb in the year ended March 2011, driven by holiday and VFR.

- While the international youth markets average length of stay declined, older visitors stay increased by almost 5 nights.

- The Toowoomba region sits firmly as a short break destination for residents of South East Queensland and Northern NSW, with 78% of domestic visitors to the region travelling for 1-3 nights on their trip.

- Interstate business travelers have increased their average length of stay in the Toowoomba region by 2 nights over the past three years to March 2011.

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

	Hotels/Motels/ Serviced apartments <sup>4</sup>
Guest arrivals	407,000
Annual change	-9%
Room occupancy	61.9%
Percentage point change	-1.1%
Average room rate	\$108.30
Annual change	1%
Yield <sup>5</sup>	\$67.07
Annual change	-1%

- Reflecting the soft visitation, the Toowoomba region had a decline in guest arrivals (down -9%) in the year ended March 2011.

- Despite this, room occupancy, average room rates and yield were essentially flat.

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 visitation

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

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	373,000	0%	981,000	-5%	2.6	-0.1
VFR	483,000	-7%	1,523,000	-3%	3.2	0.1
Business	245,000	-10%	807,000	4%	3.3	0.4
<b>Total<sup>6</sup></b>	<b>1,186,000</b>	<b>-5%</b>	<b>3,526,000</b>	<b>-1%</b>	<b>3.0</b>	<b>0.1</b>
<b>Intrastate</b>						
Holiday	289,000	2%	673,000	-6%	2.3	-0.2
VFR	397,000	-8%	1,163,000	-1%	2.9	0.2
Business	218,000	-11%	668,000	-4%	3.1	0.2
Total	965,000	-5%	2,645,000	-3%	2.7	0.1
<b>Interstate</b>						
Holiday	84,000	-5%	308,000	-2%	3.7	0.1
VFR	86,000	-1%	360,000	-9%	4.2	-0.3
Total	222,000	-3%	881,000	3%	4.0	0.2

### Domestic day trip visitors year ended March 2011

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Toowoomba <sup>7</sup>	2,547,000	13%	n/p	n/p
Queensland	34,258,000	7%	\$3,627	7%
Australia	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 Toowoomba 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Regional Qld	601,000	-7%	1,705,000	-3%
Brisbane	364,000	-2%	941,000	-3%
Regional NSW	108,000	9%	360,000	17%

### State comparison Domestic year ended March 2011

Total visitors	Visitors	Annual % change	Nights	Annual % 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%
<b>Holiday visitors</b>				
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%

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

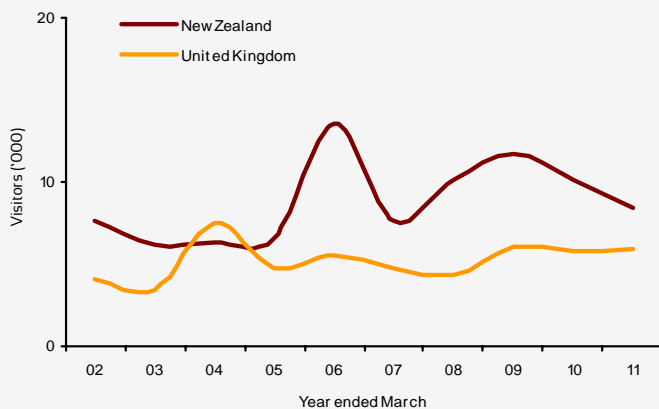
### International visitors to Toowoomba

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	16,000	-20%	225,000	-6%	14.4	2.5
VFR	12,000	-14%	185,000	11%	15.5	3.2
<b>Total<sup>9</sup></b>	<b>36,000</b>	<b>-8%</b>	<b>703,000</b>	<b>3%</b>	<b>19.6</b>	<b>2.1</b>

### Key international source markets to Toowoomba

	Visitors	Annual % change	Nights	Annual % change
<b>Total visitors</b>				
New Zealand	8,000	-20%	99,000	n/p
United Kingdom	6,000	0%	83,000	n/p

New Zealand and United Kingdom visitors to Toowoomba YE March 02-11



### 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>9</sup>	5,396,000	4%	186,600,000	3%

#### Holiday visitors

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>9</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)

The Toowoomba region covers the ABS Darling Downs region, however it excludes the Southern Downs area (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%
<b>Toowoomba</b>	<b>1,186,000</b>	<b>-5%</b>	<b>3,526,000</b>	<b>-1%</b>	<b>3.0</b>	<b>0.1</b>	<b>31%</b>	<b>41%</b>	<b>21%</b>	<b>7%</b>
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%
<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%
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%
<b>Toowoomba</b>	<b>36,000</b>	<b>-8%</b>	<b>703,000</b>	<b>3%</b>	<b>19.6</b>	<b>2.1</b>	<b>44%</b>	<b>33%</b>	<b>14%</b>	<b>2%</b>
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 Downs	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 5 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 aggregate of Toowoomba (R), Dalby (R), Roma (R) and South Burnett (R) 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.