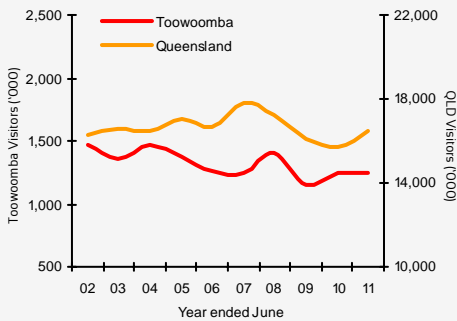


Year ended June 2011

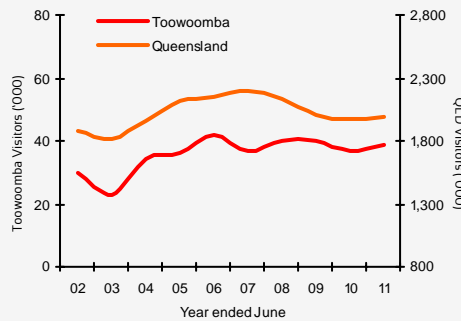


	Visitors	Holiday	VFR	Business
Domestic overnight	1,250,000	396,000	455,000	284,000
Annual change ¹	● 0%	▼ -1%	▼ -14%	▲ 20%
Trend change ²	▼ -4%	● 0%	▼ -6%	▼ -9%
International overnight	39,000	17,000	13,000	5,000
Annual change	▲ 5%	▼ -6%	▲ 8%	n/p
Trend change	▼ -1%	▼ -2%	▼ -5%	● 0%
TOTAL	1,289,000	413,000	468,000	289,000
Annual change	● 0%	▼ -1%	▼ -13%	▲ 21%

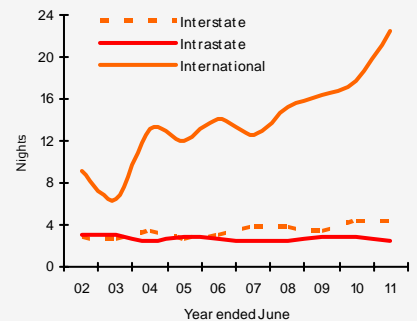
Domestic visitation



International visitation



Average length of stay (Toowoomba)



- Domestic visitation to Toowoomba remained stable in the year ending June 2011. The recovery in 2010 following the Global Financial Crisis slowed due to the impact of the 2010/2011 QLD floods and renewed fears of another recession.
- While domestic VFR (visiting friends and relatives) declined, particularly from intrastate, holiday visitation overall was relatively stable for Toowoomba. Declines from intrastate holiday markets were countered by increased holiday visitation from regional NSW.
- Intrastate business grew strongly for Toowoomba with growth linked to the flood recovery effort and the continuing expansion of mining in the Surat Basin.

- International visitation to Toowoomba recovered in the year ending June 2011, driven by growth from Asian markets. Such growth came from holiday visitors (including working holiday), education and VFR.
- Similar to the state trend, there were declines in visitation from Europe. Many European countries continue to be plagued with ongoing economic instability and high youth unemployment.
- Going against the state trend, the youth market (under 30 years) to Toowoomba region recovered over the last year, with growth from the more resilient sectors of VFR and education assisting this result.

- International visitors' average stay in Toowoomba reached 22.4 nights in the year ending June 2011, up 4.6 nights on the previous year. This increase was driven by working holiday visitors, with education visitors also contributing to the extended length of stay of international visitors in Toowoomba.
- International visitors on a working holiday contribute almost 26% of all international nights spent in Toowoomba region.
- Both intrastate and interstate domestic visitors reduced their average stay in Toowoomba, although the decline was more noticeable for intrastate visitors.

Tourist Accommodation³

	Hotels/Motels/Serviced apartments ⁴
Guest arrivals	404,000
Annual change	-8%
Room occupancy	63.3%
Percentage point change	0.8%
Average room rate	\$110
Annual change	3%
Yield⁵	\$70
Annual change	4%

- Overall visitation to Toowoomba remained stable in the year ending June 2011. However, the commercial accommodation sector recorded a decline of 8% in guest arrivals, indicating that visitors are using different forms of commercial accommodation, other than hotels, motels or serviced apartments, or opting for non-commercial accommodation, such as staying with friends and relatives.

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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Domestic visitation Year ended June 2011

Domestic visitors to Toowoomba

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	396,000	-1%	1,103,000	7%	2.8	0.2
VFR	455,000	-14%	1,355,000	-17%	3.0	-0.1
Business	284,000	20%	733,000	-29%	2.6	-1.8
Total⁶	1,250,000	0%	3,490,000	-11%	2.8	-0.4
Intrastate						
Holiday	287,000	-12%	704,000	-8%	2.5	0.2
VFR	359,000	-19%	961,000	-22%	2.7	-0.1
Business	254,000	28%	577,000	-28%	2.3	-1.7
Total	997,000	-3%	2,411,000	-18%	2.4	-0.5
Interstate						
Holiday	109,000	54%	399,000	50%	3.7	0.0
VFR	97,000	11%	394,000	-1%	4.1	-0.5
Total	254,000	13%	1,079,000	9%	4.3	-0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Toowoomba	2,671,000	-1%	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 Toowoomba

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	566,000	-11%	1,403,000	-24%
Brisbane	430,000	12%	1,008,000	-9%
Regional NSW	127,000	34%	515,000	75%

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

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.

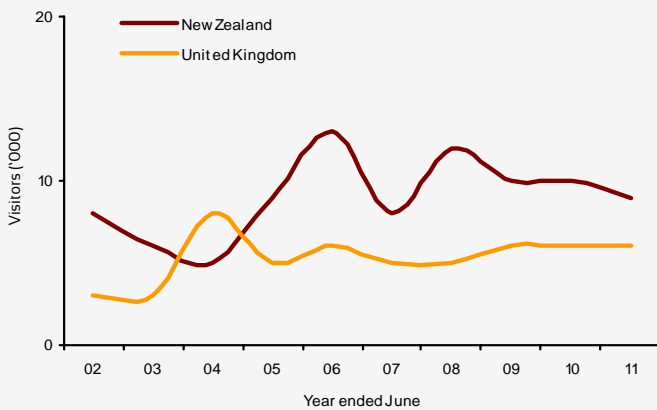


International visitation Year ended June 2011

International visitors to Toowoomba

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	17,000	-6%	333,000	48%	19.1	6.3
VFR	13,000	8%	223,000	46%	17.4	4.9
Total⁷	39,000	5%	872,000	34%	22.4	4.6

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



Key international source markets to Toowoomba

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	9,000	-10%	105,000	n/p
United Kingdom	6,000	0%	79,000	n/p

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

The Toowoomba region covers the ABS Darling Downs region, however it excludes the Southern Downs area (Stanthorpe and Warwick).

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 Darling Downs 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.