

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in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011.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

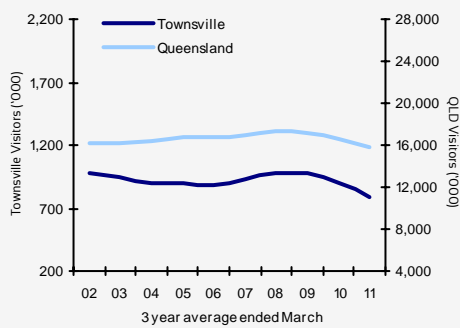
National and state level NVS data will be published as normal on a year ended basis.

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	Expenditure (\$m)
Domestic overnight 3 year average	783,000	257,000	220,000	230,000	n/p
Trend change <sup>1</sup>	▼ -12%	▼ -17%	▼ -15%	▼ -10%	n/p
International overnight	124,000	97,000	16,000	6,000	\$91
Annual change <sup>2</sup>	▼ -14%	▼ -18%	▼ -16%	n/p	▼ -25%
Trend change	▼ -4%	▼ -6%	▲ 2%	▲ 8%	▲ 2%

### Domestic visitation



- There has been a decline in the number of domestic visitors travelling to Townsville over the three years to March 2011 (which follows the State trend).

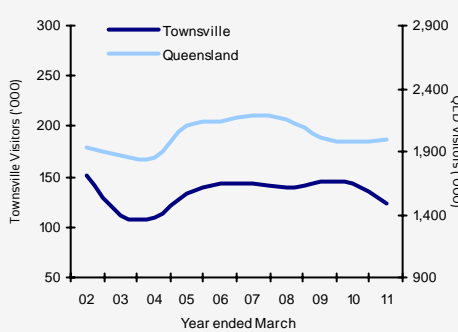
- Interstate visitors to Townsville increased, driven by business and VFR (visiting friends & relatives).

- However, there was large declines in intrastate visitors, who represent 79% of all domestic visitors to Townsville.

- The number of visitors driving to Townsville declined, reflecting the reduced accessibility to the region as a result of the recent floods and cyclones.

- While more visitors from Brisbane and Melbourne travelled to Townsville, locals and residents from neighboring regions reduced their travel to the region.

### International visitation



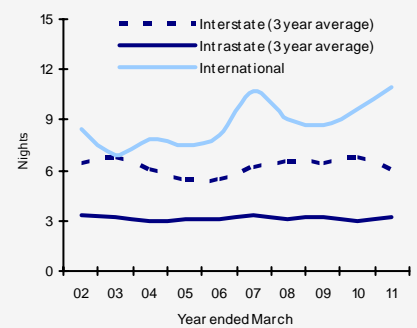
- International visitation to Townsville declined in the year to March 2011. This was driven by the downturn in United Kingdom (UK) and European markets, a trend also seen by the state. The UK is Townsville's largest international source market.

- The youth market (under 30 years old) is significant for the Townsville region accounting for approximately 59% of all international visitors.

- Visitors staying in backpacker or hostel accommodation in Townsville declined by 24% or around 14,000 visitors during the year ended March 2011.

- There was a decline in the number of visitors travelling unaccompanied to the region by 24% (or 20,000 visitors). However, the number of family groups increased.

### Average length of stay (Townsville)



- In contrast to the state trend, international visitor length of stay to Townsville recorded an increase of 1.4 nights during the year ended March 2011. This was driven by the VFR market who increased their average stay in the region by 3.4 nights.

- While there was a decline in visitor numbers from the youth market, visitor nights remained stable as they increased their average length of stay in the region.

- Queenslanders continued to spend over 3 nights in Townsville which increased slightly over the year, mainly due to Brisbane visitors staying longer.

- Interstate visitors average length of stay declined, following a period of strong growth, driven by visitors from Melbourne shortening their stay in Townsville.

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

	Hotels/Motels/Service apartments <sup>4</sup>
Guest arrivals	478,000
Annual change	1%
Room occupancy	64.9%
Percentage point change	5.8%
Average room rate	\$124.89
Annual change	4%
Yield <sup>5</sup>	\$81.01
Annual change	14%

- In the year ending March 2011, guest arrivals to Townsville's commercial accommodation sector increased slightly by 1%.

- Room occupancy also increased by 5.8 percentage points on the previous year. Strong increases in the average room rate (up 4%) and yield (up 14%) suggests that Townsville's accommodation sector may be recovering.

For more information on commercial accommodation for this 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 Year ended March 2011

### Domestic visitors to Townsville

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	257,000	-17%	972,000	-17%	3.8	0.0
VFR	220,000	-15%	981,000	-8%	4.5	0.3
Business	230,000	-10%	753,000	-9%	3.3	0.0
<b>Total<sup>6</sup></b>	<b>783,000</b>	<b>-12%</b>	<b>3,011,000</b>	<b>-9%</b>	<b>3.8</b>	<b>0.1</b>
<b>Intrastate</b>						
Holiday	189,000	-22%	515,000	-21%	2.7	0.0
VFR	166,000	-19%	661,000	-7%	4.0	0.5
Business	196,000	-13%	579,000	-10%	3.0	0.1
Total	616,000	-16%	1,987,000	-10%	3.2	0.2
<b>Interstate</b>						
Holiday	68,000	-3%	457,000	-11%	6.7	-0.6
VFR	54,000	4%	321,000	-9%	5.9	-0.8
Total	167,000	2%	1,025,000	-8%	6.1	-0.6

### Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Townsville <sup>7</sup>	1,273,000	15%	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 Townsville

Total visitors	Visitors	Trend % change	Nights	Trend % change
Regional Qld	500,000	-20%	1,518,000	-16%
Brisbane	116,000	8%	468,000	19%
Sydney	43,000	-2%	161,000	-9%
Regional NSW	40,000	-2%	338,000	-8%

### State comparison - Domestic

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%

### 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%

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

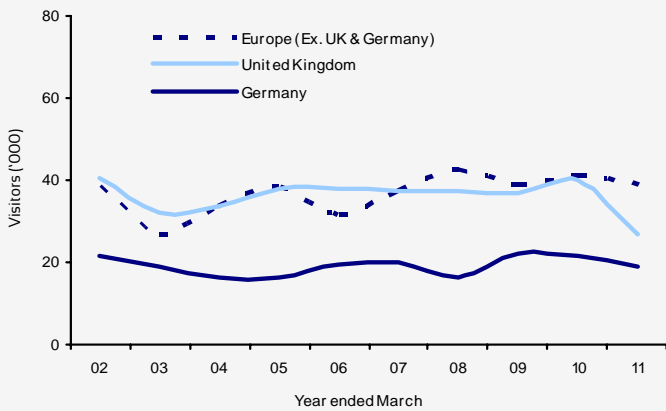
### International visitors to Townsville

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	97,000	-18%	519,000	-14%	5.4	0.2
VFR	16,000	-16%	285,000	9%	17.5	3.5
Business	6,000	50%	42,000	17%	6.8	-1.8
<b>Total<sup>6</sup></b>	<b>124,000</b>	<b>-14%</b>	<b>1,361,000</b>	<b>-2%</b>	<b>11.0</b>	<b>1.4</b>

### Key international source markets to Townsville

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	39,000	-5%	277,000	23%
United Kingdom	27,000	-33%	266,000	3%
Germany	19,000	-10%	117,000	0%
New Zealand	10,000	-9%	144,000	9%
United States	8,000	-27%	104,000	n/p

European, United Kingdom and German visitors to Townsville YE March 02 - 11



### State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
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>8</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>8</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 Townsville tourism region aligns with the the ABS region.

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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%
<b>Townsville</b>	<b>783,000</b>	<b>-12%</b>	<b>3,011,000</b>	<b>-9%</b>	<b>3.8</b>	<b>0.1</b>	<b>33%</b>	<b>28%</b>	<b>29%</b>	<b>5%</b>
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%
<b>Townsville</b>	<b>124,000</b>	<b>-14%</b>	<b>1,361,000</b>	<b>-2%</b>	<b>11.0</b>	<b>1.4</b>	<b>78%</b>	<b>13%</b>	<b>5%</b>	<b>6%</b>
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%
<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 & 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 Northern tourism region 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. Excludes Transit visitors who did not have a stopover place.

n/p - not published.