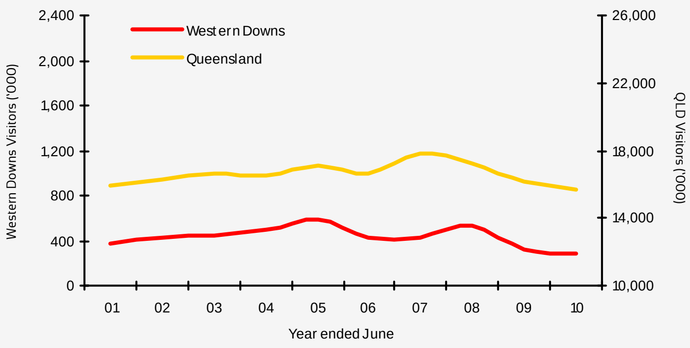
Western Downs Regional Snapshot

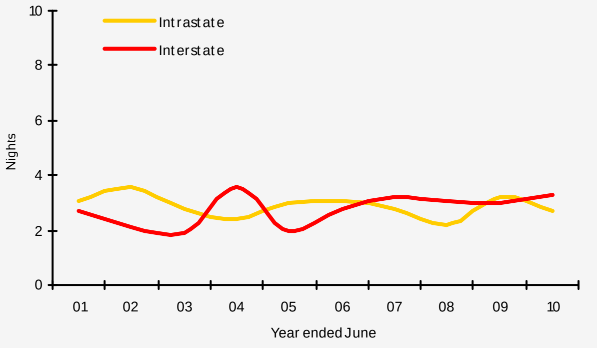
Year ended June 2010

	Visitors	Holiday	VFR	Business
Domestic overnight	293,000	98,000	90,000	82,000
Trend change[1]	▼ -11%	▼ -6%	▼ -10%	▼ -16%
International overnight	10,000	7,000	n/p	n/p
Trend change	0%	0%	n/p	n/p
TOTAL	303,000	105,000	n/p	n/p
Trend change	▼ -10%	▼ -6%	n/p	n/p

Domestic visitation



Average length of stay (Western Downs)



- Similar to the state trend, domestic overnight visitors to the Western Downs region declined over the three years to June 2010.
- Positively, the Western Downs largest domestic market, regional Queensland, increased on a trend basis particularly for holiday purposes. The region is benefitting from the travel close to home and more affordable short break trip trend that dominated domestic travel over the last year.
- The primary driver of the Western Downs decline was from Brisbane residents reducing their travel overall. Residents of the states capital opted for trips within South East Queensland or to interstate destinations over the last year.

- The Western Downs' average length of stay for domestic holiday, VFR and business purposes remain firmly within the 2 to 3 night category. Highlighting the short trip nature of the region.

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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Western Downs Regional Snapshot

Domestic and International visitation Year ended June 2010

Domestic visitors to Western Downs

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	98,000	-6%	250,000	-13%	2.5	-0.3
VFR	90,000	-10%	294,000	-3%	3.3	-2.2
Business	82,000	-16%	238,000	-21%	2.9	1.2
Total[2]	293,000	-11%	844,000	-11%	2.9	-0.2
Intrastate						
Holiday	60,000	-7%	124,000	-17%	2.1	-0.2
VFR	69,000	-8%	244,000	-2%	3.5	-2.7
Business	72,000	-11%	177,000	-18%	2.4	0.7
Total	210,000	-10%	569,000	-11%	2.7	-0.5
Interstate						
Holiday	39,000	-5%	126,000	-9%	3.3	-0.7
Total	83,000	-13%	275,000	-13%	3.3	0.3

International visitors to Western Downs

	Visitors	Trend % Change	Nights	Trend % change	Length of stay	Nights change
Holiday	7,000	0%	77,000	31%	11.2	7.2
Total[3]	10,000	0%	151,000	2%	15.2	6.7

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%
Holiday visitors				
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%

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%
Holiday visitors				
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

Overview snapshots are also available for both Domestic and International visitors. Any questions or comments, please email research@tq.com.au

The Western Downs tourism region includes areas from within the Outback and Darling Downs ABS regions, these include; Goondiwindi, Roma, Balonne, Bendemere, Bungil, Chinchilla, Millmerran, Murilla, Tara, Taroom, Waggamba and Warroo.

Western Downs Regional Snapshot

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[4]	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%
Southern Downs	338,000	n/p	715,000	n/p	2.1	-0.5	50%	33%	16%	2%
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%**
Total	15,726,000	-2%	70,814,000	5%	4.5	0.3	45%	33%	19%	-

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[4]	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%**
Southern Downs	9,000	n/p	104,000	n/p	11.5	n/p	78%	22%	0%	0%
Total	1,970,000	-2%	39,011,000	-2%	19.8	0.0	72%	24%	8%	-

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. This figure includes "Other" visitors.
3. This figure includes "VFR", "Business" and "Other" visitors.
4. South East Queensland Country.

n/p - not published.