

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in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011.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

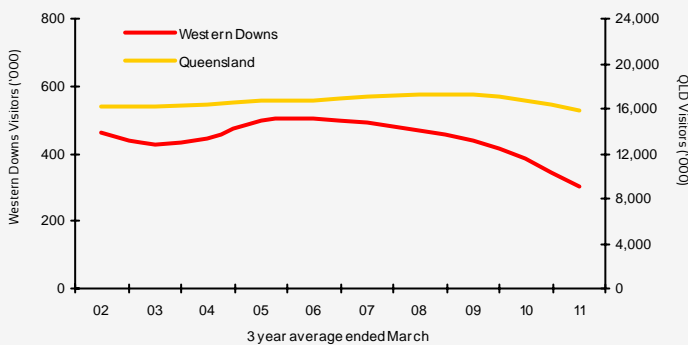
National and state level NVS data will be published as normal on a year ended basis.

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



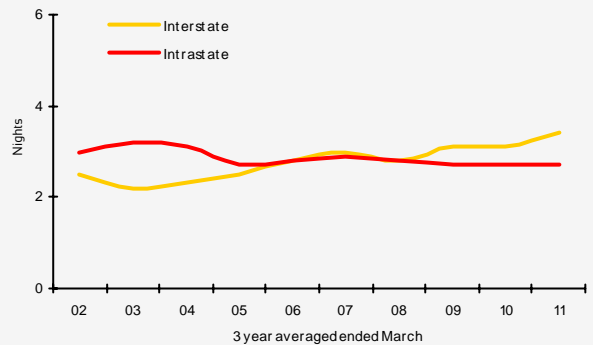
	Visitors	Holiday	VFR	Business
Domestic overnight 3 year average	301,000	128,000	78,000	73,000
Trend change ¹	▼ -22%	▼ -9%	▼ -27%	▼ -33%
International overnight	12,000	7,000	n/p	n/p
Trend change	● -3%	● -8%	n/p	n/p

Domestic visitation



- The Western Downs is yet to recover to the levels of domestic visitation seen prior to the Global Financial Crisis, with flood events over the last three years not assisting domestic travel to the region.
- The intrastate holiday market remained stable on a trend basis, with the decline in visitors to the Western Downs being driven by the VFR (visiting friends and relatives) and business sectors.
- The domestic touring market for the Western Downs region has remained resilient on a trend basis. Around 41% of domestic leisure visitors to the region are on a touring trip.

Average length of stay (Western Downs)



- Although the intrastate holiday market remained stable, the average length of stay by Queenslanders holidaying in the Western Downs eased on a trend basis, with reduced consumer confidence contributing to a preference for shorter breaks (1-3 nights).
- While there were declines in the holiday and VFR markets average length of stay, this was countered by business travellers increasing their average stay in the Western Downs, particularly those from interstate.



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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Domestic and International visitation

Domestic visitors to Western Downs 3 year average ended March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	128,000	-9%	327,000	-14%	2.6	-0.2
VFR	78,000	-27%	312,000	-24%	4.0	0.2
Business	73,000	-33%	186,000	-23%	2.5	0.3
Total²	301,000	-22%	878,000	-19%	2.9	0.1
Intrastate						
Holiday	85,000	-1%	184,000	-9%	2.2	-0.2
VFR	59,000	-31%	253,000	-28%	4.3	0.2
Business	62,000	-36%	127,000	-31%	2.0	0.1
Total	215,000	-23%	584,000	-23%	2.7	0.0
Interstate						
Holiday	43,000	-20%	143,000	-20%	3.3	0.0
Total	86,000	-20%	294,000	-11%	3.4	0.3

International visitors to Western Downs year ended March 2011

	Visitors	Trend % Change	Nights	Trend % change	Length of stay	Nights change
Holiday	7,000	-8%	66,000	1%	9.4	0.9
Total³	12,000	-3%	167,000	1%	14.1	1.3



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%
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%

State comparison - International year ended March 2011

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 ⁴	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 ⁴	2,866,000	1%	57,770,000	-5%

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.

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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 Downs	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. This figure includes "VFR", "Business" and "Other" visitors

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

n/p not published.