

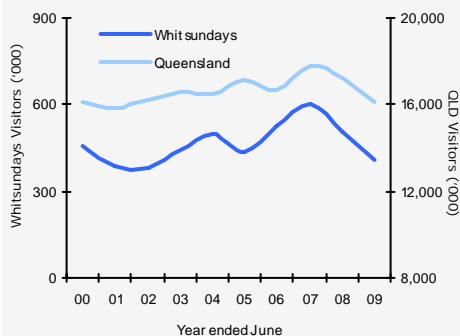
# Whitsundays Regional Snapshot

Year ended June 2009

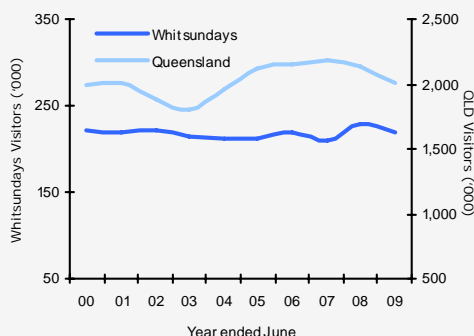


|                                | Visitors       | Holiday        | VFR           | Business      | Expenditure (\$m) |
|--------------------------------|----------------|----------------|---------------|---------------|-------------------|
| <b>Domestic overnight</b>      | <b>407,000</b> | <b>284,000</b> | <b>65,000</b> | <b>39,000</b> | <b>n/p</b>        |
| Annual change <sup>1</sup>     | ▼ -19%         | ▼ -16%         | ▲ 25%         | n/p           | n/p               |
| Trend change <sup>2</sup>      | ▼ -7%          | ▼ -4%          | ▼ -1%         | ▼ -23%        | n/p               |
| <b>International overnight</b> | <b>218,000</b> | <b>211,000</b> | <b>5,000</b>  | <b>n/p</b>    | <b>\$129</b>      |
| Annual change                  | ▼ -4%          | ▼ -5%          | ▲ 25%         | n/p           | ▼ -2%             |
| Trend change                   | 0%             | 0%             | ▲ 18%         | n/p           | 0%                |

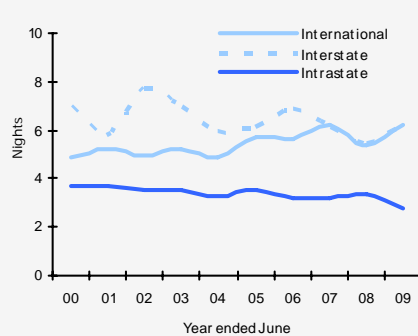
Domestic visitation



International visitation



Average length of stay (Whitsundays)



Domestic visitation to the Whitsundays region followed the pattern seen in many Queensland regions located outside of the south east corner of the state, and declined.

The driver of the fall in visitation was a reduction in intrastate holiday visitors, with declines in the number of holidaymakers from Brisbane a key influence. Regions such as Mackay, Tropical North Queensland, and Townsville all saw similar declines out of Brisbane.

The move towards travel closer to home, places greater importance on local and neighbouring markets. In the year ending June 2009 domestic travel to the Whitsundays was further impacted by residents of the Whitsundays and Mackay taking fewer domestic trips.

Travel to visit friends or relatives (VFR) however grew, with the region welcoming additional intrastate and interstate VFR visitors.

The decline in international visitation to the Whitsundays (-4%) was similar to the States performance (-5%).

One market that continues to increase travel to the region is Continental Europe. The majority of visitors from Continental Europe are under the age of 30. The under 30 (or youth) market from the United States also performed quite well, remaining stable on the level achieved in the same period last year.

However, visitation from the United Kingdom (UK) youth market declined in the year ending June 2009. This drop, combined with a reduced number of UK visitors in the 30 – 44 year age group drove the overall decline in international visitation to the region.

The majority of youth visitors stay in a backpackers or hostel in the region, with the second most popular form of accommodation, (and one which is experiencing the most growth) staying on a commercial boat.

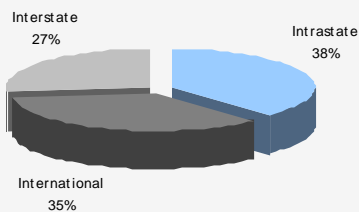
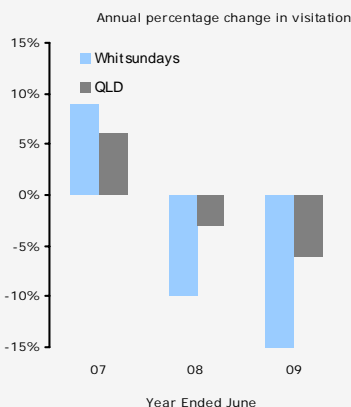
Intrastate visitors length of stay declined in the year ending June 2009, with the desire to save money and opt for a short break in the current uncertain economic times a key contributor to this change.

Overall, interstate visitors increased their length of stay in the Whitsundays. Interstate holiday visitors however had a relatively stable length of stay (5.9 nights) in the region.

International visitors average length of stay was boosted by working holiday visitors who increased their length of stay in the Whitsundays.

International holiday visitors (excluding working holiday) stayed on average 4.2 nights in the region (this was stable on the previous year).

Total visitation



There were **625,000** overnight visitors to the Whitsundays region in the year ended June 2009, and this was a 15% decline.

The drop in domestic visitation was the main driver of the decline in visitation to the Whitsundays.

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.

### Domestic visitors to the Whitsundays

|                   | Visitors | Annual % change | Nights    | Annual % change | Length of stay | Nights change |
|-------------------|----------|-----------------|-----------|-----------------|----------------|---------------|
| <b>Holiday</b>    | 284,000  | -16%            | 1,231,000 | -22%            | 4.3            | -0.4          |
| <b>VFR</b>        | 65,000   | 25%             | 276,000   | 28%             | 4.2            | 0.1           |
| <b>Business</b>   | 39,000   | n/p             | 98,000    | n/p             | 2.5            | 0.0           |
| <b>Total</b>      | 407,000  | -19%            | 1,705,000 | -20%            | 4.2            | 0.0           |
| <b>Intrastate</b> |          |                 |           |                 |                |               |
| <b>Holiday</b>    | 162,000  | -15%            | 506,000   | -27%            | 3.1            | -0.5          |
| <b>VFR</b>        | 36,000   | n/p             | 80,000    | n/p             | 2.2            | -1.5          |
| <b>Business</b>   | 28,000   | n/p             | 56,000    | n/p             | 2.0            | -0.2          |
| <b>Total</b>      | 237,000  | -22%            | 653,000   | -37%            | 2.8            | -0.6          |
| <b>Interstate</b> |          |                 |           |                 |                |               |
| <b>Holiday</b>    | 122,000  | -18%            | 725,000   | -18%            | 5.9            | -0.1          |
| <b>VFR</b>        | 29,000   | n/p             | 196,000   | n/p             | 6.7            | 1.9           |
| <b>Business</b>   | 11,000   | n/p             | 42,000    | n/p             | 3.9            | 0.5           |
| <b>Total</b>      | 169,000  | -16%            | 1,052,000 | -5%             | 6.2            | 0.7           |

### Key domestic source markets to the Whitsundays

|                     | Visitors | Annual % change | Nights  | Annual % change |
|---------------------|----------|-----------------|---------|-----------------|
| <b>Regional Qld</b> | 184,000  | -15%            | 476,000 | -30%            |
| <b>NSW</b>          | 106,000  | -10%            | 640,000 | 4%              |
| <b>Brisbane</b>     | 53,000   | -38%            | 177,000 | n/p             |
| <b>VIC</b>          | 40,000   | n/p             | 266,000 | n/p             |

### State comparison - Domestic

| <b>Total visitors</b>   | Visitors   | Annual % change | Nights      | Annual % change |
|-------------------------|------------|-----------------|-------------|-----------------|
| Queensland              | 16,121,000 | -6%             | 67,645,000  | -11%            |
| NSW                     | 22,550,000 | -7%             | 77,471,000  | -6%             |
| Victoria                | 15,912,000 | -8%             | 49,426,000  | -6%             |
| Rest of Aus             | 14,733,000 | -8%             | 63,033,000  | -10%            |
| <b>Australia</b>        | 67,066,000 | -7%             | 257,575,000 | -8%             |
| <b>Holiday visitors</b> |            |                 |             |                 |
| Queensland              | 7,304,000  | -4%             | 34,653,000  | -12%            |
| NSW                     | 10,049,000 | -4%             | 39,308,000  | -1%             |
| Victoria                | 7,424,000  | -9%             | 24,644,000  | -7%             |
| Rest of Aus             | 6,368,000  | -8%             | 29,484,000  | -11%            |
| <b>Australia</b>        | 30,087,000 | -6%             | 128,089,000 | -8%             |

Queensland recorded a more marginal decline in total visitors, and holiday visitors than the Nation. Queensland's improved intrastate results was a key contributor.

### Domestic day trip visitors

|                    | Day trip visitors | Annual % change | Expenditure (\$ million) | Annual % change |
|--------------------|-------------------|-----------------|--------------------------|-----------------|
| <b>Whitsundays</b> | 261,000           | -16%            | n/p                      | n/p             |
| <b>Queensland</b>  | 31,438,000        | 10%             | \$3,175                  | 3%              |
| <b>Australia</b>   | 141,437,000       | 3%              | \$14,566                 | 3%              |



# Whitsundays Regional Snapshot

International visitation Year ended June 2009

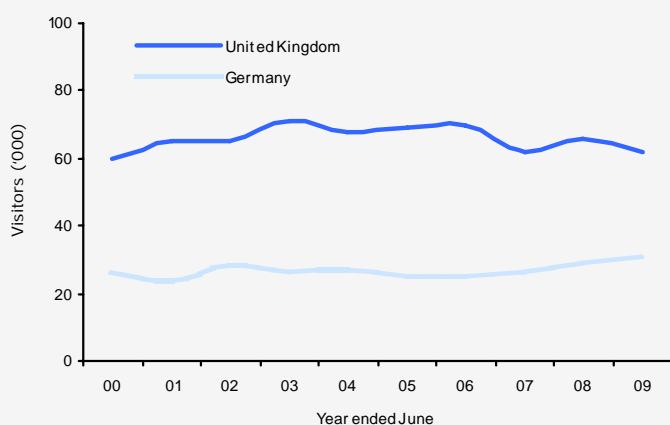
## International visitors to the Whitsundays

|              | Visitors       | Annual % change | Nights           | Annual % change | Length of stay | Nights change |
|--------------|----------------|-----------------|------------------|-----------------|----------------|---------------|
| Holiday      | 211,000        | -5%             | 1,191,000        | 7%              | 5.6            | 0.6           |
| VFR          | 5,000          | n/p             | 46,000           | n/p             | 10.3           | 0.5           |
| <b>Total</b> | <b>218,000</b> | <b>-4%</b>      | <b>1,352,000</b> | <b>11%</b>      | <b>6.2</b>     | <b>0.8</b>    |

## Key international source markets and purpose of visit

| Total visitors | Visitors | Annual % change | Nights  | Annual % change |
|----------------|----------|-----------------|---------|-----------------|
| United Kingdom | 62,000   | -6%             | 322,000 | -5%             |
| Germany        | 31,000   | 7%              | 131,000 | -12%            |
| United States  | 16,000   | 7%              | 64,000  | 25%             |
| Scandinavia    | 13,000   | 8%              | 72,000  | -19%            |
| Canada         | 13,000   | -19%            | 110,000 | 16%             |

## United Kingdom and German visitors to the Whitsundays YE June 00 - 09



## State comparison - International

| Total visitors   | Visitors  | Annual % Change | Nights      | Annual % change |
|------------------|-----------|-----------------|-------------|-----------------|
| Queensland       | 2,012,000 | -5%             | 39,863,000  | 2%              |
| NSW              | 2,712,000 | -3%             | 60,541,000  | 6%              |
| Victoria         | 1,481,000 | 0%              | 35,902,000  | 13%             |
| Rest of Aus      | 1,341,000 | 0%              | 37,346,000  | 12%             |
| Australia        | 5,072,000 | -2%             | 173,652,000 | 8%              |
| Holiday visitors |           |                 |             |                 |
| Queensland       | 1,454,000 | -8%             | 19,509,000  | 5%              |
| NSW              | 1,525,000 | -6%             | 19,334,000  | 6%              |
| Victoria         | 747,000   | -4%             | 7,779,000   | -3%             |
| Rest of Aus      | 756,000   | -3%             | 12,052,000  | 10%             |
| Australia        | 2,785,000 | -6%             | 58,675,000  | 5%              |

Queensland saw an increase in the often more affordable form of travel, VFR. However, due to its' greater reliance on the holiday market it experienced a larger decline in visitation overall than the Nation.



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 Whitsundays tourism region includes the shires of Whitsundays and Bowen.

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# Whitsundays Regional Snapshot

Year ended June 2009

## Domestic Regional Comparison

|                         | Visitors          | Annual % change | Nights            | Annual % change | Length of stay | Nights change | Holiday %  | VFR %      | Business % | % Share of visitors to QLD |
|-------------------------|-------------------|-----------------|-------------------|-----------------|----------------|---------------|------------|------------|------------|----------------------------|
| Brisbane                | 4,627,000         | 1%              | 14,697,000        | 3%              | 3.2            | 0.1           | 28%        | 37%        | 26%        | 29%                        |
| Gold Coast              | 3,179,000         | -7%             | 13,291,000        | -13%            | 4.2            | -0.2          | 62%        | 26%        | 10%        | 20%                        |
| Sunshine Coast          | 2,589,000         | -12%            | 10,269,000        | -13%            | 4.0            | 0.0           | 63%        | 29%        | 6%         | 16%                        |
| SEQC <sup>3</sup>       | 2,308,000         | -9%             | 6,630,000         | -6%             | 2.9            | 0.1           | 38%        | 45%        | 12%        | 14%                        |
| Tropical North Qld      | 1,518,000         | 5%              | 7,222,000         | -11%            | 4.8            | -0.8          | 55%        | 22%        | 16%        | 9%                         |
| Central Qld             | 995,000           | -15%            | 3,507,000         | -9%             | 3.5            | 0.2           | 40%        | 25%        | 30%        | 6%                         |
| Toowoomba               | 974,000           | -16%            | 2,755,000         | -16%            | 2.8            | 0.0           | 29%        | 39%        | 26%        | 6%                         |
| Townsville              | 852,000           | -11%            | 2,938,000         | -16%            | 3.4            | -0.3          | 31%        | 27%        | 34%        | 5%                         |
| Fraser Coast            | 848,000           | 23%             | 3,594,000         | 35%             | 4.2            | 0.3           | 48%        | 39%        | 12%        | 5%                         |
| Capricorn               | 584,000           | -32%            | 1,956,000         | -27%            | 3.3            | 0.2           | 37%        | 28%        | 29%        | 4%                         |
| Mackay                  | 577,000           | -19%            | 2,684,000         | -9%             | 4.7            | 0.5           | 24%        | 35%        | 37%        | 4%                         |
| Bundaberg               | 478,000           | -25%            | 1,731,000         | -17%            | 3.6            | 0.3           | 40%        | 38%        | 12%        | 3%                         |
| <b>Whitsundays</b>      | <b>407,000</b>    | <b>-19%</b>     | <b>1,705,000</b>  | <b>-20%</b>     | <b>4.2</b>     | <b>0.0</b>    | <b>70%</b> | <b>16%</b> | <b>10%</b> | <b>3%</b>                  |
| Outback                 | 372,000           | -27%            | 1,718,000         | -23%            | 4.6            | 0.2           | 37%        | 20%        | 33%        | 2%                         |
| Gladstone               | 298,000           | -11%            | 1,083,000         | -7%             | 3.6            | 0.1           | 57%        | 22%        | 19%        | 2%                         |
| Western Downs           | 297,000           | -34%            | 939,000           | -21%            | 3.2            | 0.6           | 36%        | 26%        | 33%        | 2%                         |
| Southern Downs          | 191,000           | -30%            | 488,000           | -27%            | 2.6            | 0.2           | 57%        | 30%        | 8%         | 1%                         |
| <b>Total Queensland</b> | <b>16,121,000</b> | <b>-6%</b>      | <b>67,645,000</b> | <b>-11%</b>     | <b>4.2</b>     | <b>-0.2</b>   | <b>45%</b> | <b>32%</b> | <b>20%</b> | <b>-</b>                   |

## International Regional Comparison

|                         | Visitors         | Annual % change | Nights            | Annual % change | Length of stay | Nights change | Holiday %  | VFR %      | Business % | % Share of visitors to QLD |
|-------------------------|------------------|-----------------|-------------------|-----------------|----------------|---------------|------------|------------|------------|----------------------------|
| Brisbane                | 922,000          | 3%              | 16,179,000        | 7%              | 17.5           | 0.7           | 55%        | 28%        | 12%        | 46%                        |
| Gold Coast              | 785,000          | -8%             | 7,732,000         | -4%             | 9.8            | 0.3           | 79%        | 16%        | 4%         | 39%                        |
| Tropical North Qld      | 703,000          | -15%            | 6,583,000         | 2%              | 9.4            | 1.6           | 91%        | 5%         | 3%         | 35%                        |
| Sunshine Coast          | 276,000          | -2%             | 2,325,000         | -3%             | 8.4            | -0.1          | 79%        | 18%        | 2%         | 14%                        |
| <b>Whitsundays</b>      | <b>218,000</b>   | <b>-4%</b>      | <b>1,352,000</b>  | <b>11%</b>      | <b>6.2</b>     | <b>0.8</b>    | <b>97%</b> | <b>2%</b>  | <b>0%</b>  | <b>11%</b>                 |
| Fraser Coast            | 197,000          | -4%             | 855,000           | -8%             | 4.3            | -0.3          | 95%        | 5%         | 0%         | 10%                        |
| Townsville              | 147,000          | 1%              | 1,329,000         | 4%              | 9.0            | 0.2           | 82%        | 12%        | 2%         | 7%                         |
| Central Qld             | 126,000          | -1%             | 1,067,000         | 8%              | 8.4            | 0.6           | 87%        | 8%         | 3%         | 6%                         |
| SEQC <sup>3</sup>       | 118,000          | 7%              | 2,313,000         | 33%             | 19.6           | 3.9           | 40%        | 50%        | 5%         | 6%                         |
| Capricorn               | 81,000           | 0%              | 614,000           | 13%             | 7.6            | 0.9           | 85%        | 7%         | 2%         | 4%                         |
| Gladstone               | 56,000           | -8%             | 404,000           | -9%             | 7.2            | 0.0           | 89%        | 5%         | 4%         | 3%                         |
| Mackay                  | 55,000           | 6%              | 403,000           | 57%             | 7.3            | 2.4           | 73%        | 18%        | 9%         | 3%                         |
| Bundaberg               | 49,000           | 17%             | 645,000           | 22%             | 13.2           | 0.6           | 78%        | 16%        | 2%         | 2%                         |
| Toowoomba               | 37,000           | 3%              | 591,000           | 4%              | 16.1           | 0.5           | 49%        | 32%        | 11%        | 2%                         |
| Outback                 | 30,000           | -6%             | 452,000           | 67%             | 14.9           | 6.5           | 87%        | 7%         | 3%         | 1%                         |
| Western Downs           | 14,000           | 8%              | 118,000           | -19%            | 8.5            | -3.1          | 71%        | 14%        | 7%         | 1%                         |
| Southern Downs          | 7,000            | -30%            | 205,000           | 37%             | 30.5           | 15.3          | 57%        | 29%        | 0%         | 0%                         |
| <b>Total Queensland</b> | <b>2,012,000</b> | <b>-5%</b>      | <b>39,863,000</b> | <b>2%</b>       | <b>19.8</b>    | <b>1.5</b>    | <b>72%</b> | <b>24%</b> | <b>8%</b>  | <b>-</b>                   |

**Data sources:** National & International Visitor Surveys, Tourism Research Australia. Visitor expenditure data is courtesy of Tourism Research Australia.

1. Percentage change from the year ended June 2008 to the year ended June 2009

2. Trend change refers to the percentage change between the 3 years to June 2008 vs. the 3 years to June 2009

3. South East Queensland Country

n/p – this information is not published due to low sample size

n/a – not available