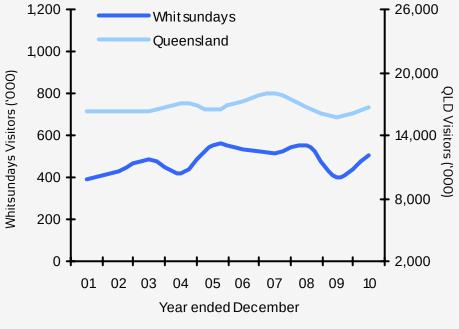
Whitsundays Regional Snapshot

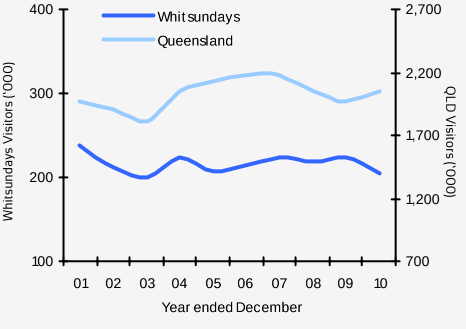
Year ended December 2010

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	501,000	353,000	87,000	55,000	n/p
Annual change[1]	▲ 24%	▲ 31%	▲ 16%	n/p	n/p
Trend change[2]	▼ -1%	▲ 1%	▲ 20%	▼ -25%	n/p
International overnight	204,000	197,000	4,000	2,000	$132
Annual change	▼ -9%	▼ -8%	n/p	n/p	▼ -15%
Trend change	▼ -3%	▼ -3%	n/p	n/p	▲ 1%
TOTAL	705,000	550,000	91,000	n/p	n/p
Annual change	▲ 12%	▲ 13%	▲ 12%	n/p	n/p

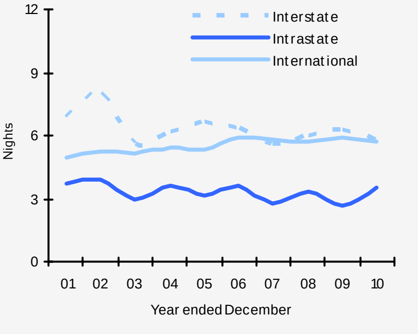
Domestic visitation



International visitation



Average length of stay (Whitsundays)



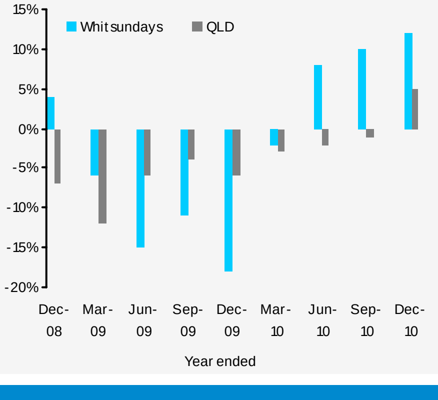
- The Whitsundays was one of only a few Queensland regions to see a strong rebound in domestic travel over the year, driven by Queenslanders returning for a holiday following the sharp decline seen to the region in 2009.
- Brisbane and Townsville residents (the regions largest source of domestic visitors) dominated the holiday recovery. A rebound from the Sydney holiday market further propelled the regions results.
- Couples travelling for a holiday returned in increasing numbers, whilst the family market weakened from an interstate perspective.
- In contrast, Queensland families taking a holiday in the region supported the intrastate recovery.

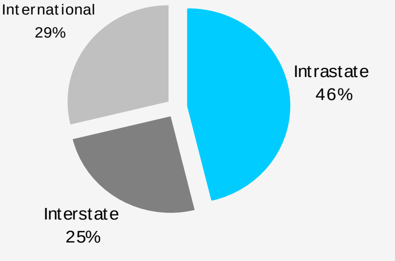
- The Whitsundays decline in international visitation, was due in part to the regions' greater reliance on the UK market - where we have seen some of the largest visitor declines. At a state level the UK market also declined however this was offset by the growth from Asian markets.
- Visitation from Germany and some smaller European markets to the Whitsundays however increased.
- 66% of all international holiday visitors to the Whitsundays are youth (under 30 years old) visitors, however the number declined in 2010, following a period of strong growth in 2009.
- The decline in youth visitors subsequently underpinned the decline in the number of visitors staying in a backpacker or hostel.

- International visitors on holiday stayed an average of 4.9 nights in the Whitsundays in 2010.
- Interstate holiday visitors tend to be the longer staying visitors to the Whitsunday's, and average 5.6 nights.
- Intrastate holiday visitor length of stay rebounded strongly up 0.7 nights, to average 3.6 nights in 2010.
- The international youth market contributed 71% of total international nights spent in the Whitsundays in 2010, however due to the downturn in visitors, nights subsequently dropped and this led to the regions expenditure decline.

Total visitation

Annual percentage change in visitation





- There were **705,000** international and domestic overnight visitors to the Whitsundays in the year ended December 2010, this was a 12% increase on the year ended December 2009.

IMPACT OF WEATHER EVENTS IN QUEENSLAND:

Significant flooding and cyclone events occurred in Queensland in late December 2010 and continued into 2011. The full impact of these events will not be seen in tourism data until year ended March 2011 data (published in June 2011). Many of Queensland's tourism regions were affected either directly or indirectly by these weather events.

Stats on Q are you subscribed?

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statsonq@tq.com.au

Whitsundays Regional Snapshot

Domestic visitation Year ended December 2010

Domestic visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	353,000	31%	1,570,000	36%	4.4	0.1
VFR	87,000	16%	367,000	27%	4.2	0.4
Business	55,000	n/p	213,000	n/p	3.9	n/p
Total[3]	501,000	24%	2,172,000	27%	4.3	0.1
Intrastate						
Holiday	210,000	48%	762,000	83%	3.6	0.7
VFR	65,000	35%	240,000	n/p	3.7	n/p
Business	44,000	n/p	117,000	n/p	2.7	n/p
Total	322,000	38%	1,128,000	77%	3.5	0.8
Interstate						
Holiday	144,000	13%	808,000	9%	5.6	-0.2
VFR	22,000	-19%	127,000	-28%	5.8	-0.7
Business	11,000	n/p	96,000	n/p	8.8	n/p
Total	179,000	5%	1,044,000	-3%	5.8	-0.5

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Whitsundays	162,000	n/p	n/p	n/p
Queensland	34,705,000	10%	$3,717	16%
Australia	151,288,000	5%	$14,969	2%

Nationally, and in QLD the popularity of day trips continued to build momentum, with the comparative affordability of this form of travel a key factor.

Key domestic source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
QLD	322,000	38%	1,128,000	77%
NSW	93,000	6%	536,000	25%
Victoria	61,000	-2%	393,000	-21%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,582,000	5%	71,208,000	2%
NSW	23,066,000	2%	78,330,000	2%
Victoria	15,812,000	0%	49,406,000	0%
Rest of Aus	14,156,000	-1%	60,597,000	0%
Australia	67,402,000	2%	259,541,000	1%
Holiday visitors				
Queensland	7,046,000	-4%	35,189,000	-4%
NSW	10,300,000	2%	38,454,000	-2%
Victoria	7,426,000	1%	24,860,000	1%
Rest of Aus	6,340,000	2%	28,824,000	0%
Australia	30,022,000	0%	127,328,000	-1%

The appeal of outbound travel also has not waned in 2010, with this further adding to the woes of domestic tourism in Australia. Clearly, consumers are seeing value for money in outbound travel, driven by low airfares and the appreciation of the $AUD against many currencies.

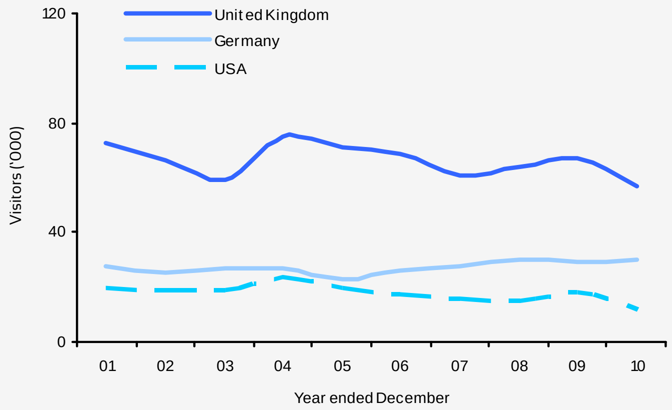
Whitsundays Regional Snapshot

International visitation Year ended December 2010

International visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	197,000	-8%	961,000	-13%	4.9	-0.2
VFR	4,000	n/p	44,000	n/p	10.0	n/p
Total[4]	204,000	-9%	1,167,000	-11%	5.7	-0.2

United Kingdom, German and American visitors to the Whitsundays YE December 01 - 10



Key international source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	57,000	-15%	269,000	-23%
Germany	30,000	3%	142,000	15%
United States	12,000	-33%	70,000	-7%
Scandinavia	11,000	-8%	52,000	-17%
Netherlands	10,000	11%	48,000	-6%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,048,000	4%	39,800,000	2%
NSW	2,839,000	5%	65,225,000	6%
Victoria	1,649,000	8%	40,662,000	6%
Rest of Aus	1,366,000	1%	41,024,000	8%
Australia	5,390,000	5%	186,711,000	6%
Holiday visitors				
Queensland	1,440,000	2%	18,396,000	-6%
NSW	1,610,000	4%	21,098,000	5%
Victoria	793,000	3%	8,046,000	-1%
Rest of Aus	735,000	-3%	11,708,000	-2%
Australia	2,911,000	4%	59,247,000	-1%

Recovery in international visitation to Australia was led by a strong rebound in business long-haul travel, and boosted by an increase in air capacity on key source markets routes, particularly out of Asia.

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 Whitsundays tourism region includes the shires of Whitsundays and Bowen.

Whitsundays Regional Snapshot

Tourism Queensland

Year ended December 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,860,000	16%	15,233,000	16%	3.1	0.0	29%	35%	29%	29%
Gold Coast	3,396,000	6%	13,755,000	1%	4.1	-0.1	59%	29%	9%	20%
SEQC[5]	3,018,000	8%	9,379,000	7%	3.1	0.0	43%	40%	10%	18%
Sunshine Coast	2,604,000	-3%	10,186,000	-12%	3.9	-0.4	59%	31%	6%	16%
TNQ	1,282,000	-16%	7,418,000	-6%	5.8	0.6	55%	23%	19%	8%
Toowoomba	1,238,000	1%	3,548,000	-12%	2.9	-0.4	33%	40%	20%	7%
CQ	1,124,000	-1%	3,863,000	-13%	3.4	-0.5	34%	28%	32%	7%
Capricorn	842,000	0%	3,028,000	-11%	3.6	-0.4	32%	26%	35%	5%
Townsville	837,000	11%	3,066,000	2%	3.7	-0.3	28%	28%	31%	5%
Mackay	685,000	25%	2,741,000	38%	4.0	0.4	22%	28%	45%	4%
Bundaberg	591,000	15%	2,027,000	-5%	3.4	-0.7	30%	28%	28%	4%
Fraser Coast	514,000	-10%	2,104,000	-16%	4.1	-0.2	53%	31%	11%	3%
Whitsundays	**501,000**	**24%**	**2,172,000**	**27%**	**4.3**	**0.1**	**70%**	**17%**	**11%**	**3%**
Outback	370,000	n/p	1,849,000	n/p	5.0	n/p	34%	19%	42%	2%
Gladstone	343,000	7%	1,584,000	8%	4.6	0.1	46%	31%	20%	2%
Southern Downs	334,000	n/p	779,000	n/p	2.3	n/p	53%	35%	10%	2%
Western Downs	296,000	n/p	737,000	n/p	2.5	n/p	50%	23%	21%	2%
Total	16,582,000	5%	71,208,000	2%	4.3	-0.1	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	948,000	4%	16,422,000	6%	17.3	0.3	51%	30%	12%	46%
Gold Coast	817,000	0%	8,076,000	5%	9.9	0.4	78%	15%	5%	40%
TNQ	686,000	5%	6,109,000	-2%	8.9	-0.7	91%	5%	3%	33%
Sunshine Coast	283,000	2%	2,618,000	3%	9.2	0.0	80%	18%	2%	14%
Whitsundays	**204,000**	**-9%**	**1,167,000**	**-11%**	**5.7**	**-0.2**	**97%**	**2%**	**1%**	**10%**
Fraser Coast	169,000	-10%	671,000	-6%	4.0	0.2	96%	4%	1%	8%
Townsville	131,000	-8%	1,486,000	11%	11.3	1.9	79%	11%	5%	6%
CQ	125,000	-2%	875,000	-33%	7.0	-3.2	86%	10%	5%	6%
SEQC[5]	118,000	1%	2,120,000	2%	18.0	0.2	42%	47%	7%	6%
Capricorn	78,000	-5%	573,000	-29%	7.3	-2.5	83%	10%	4%	4%
Gladstone	63,000	3%	302,000	-40%	4.8	-3.4	90%	6%	3%	3%
Mackay	49,000	-9%	379,000	-23%	7.7	-1.4	78%	18%	4%	2%
Bundaberg	42,000	-16%	690,000	0%	16.5	2.6	79%	17%	0%	2%
Toowoomba	36,000	-10%	710,000	13%	19.8	3.9	47%	31%	11%	2%
Outback	24,000	n/p	249,000	n/p	10.6	n/p	75%	13%	8%	1%
Western Downs	12,000	n/p	157,000	n/p	13.5	n/p	58%	8%	8%	1%
Southern Downs	10,000	n/p	178,000	n/p	17.1	n/p	80%	20%	0%	0%
Total	2,048,000	4%	39,800,000	2%	19.4	-0.5	70%	24%	9%	-

Data sources: National & International Visitor Surveys, Tourism Research Australia.

1. Annual change refers to the percentage change between the year ended December 2010 vs. year ended December 2009.
2. Trend change refers to the percentage change between the 3 years to December 2009 vs. the 3 years to December 2010.
3. This figure includes "Other" visitors.
4. This figure includes "VFR", "Business" and "Other" visitors.
5. South East Queensland Country.

n/p not published.

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.