Whitsundays Regional Snapshot

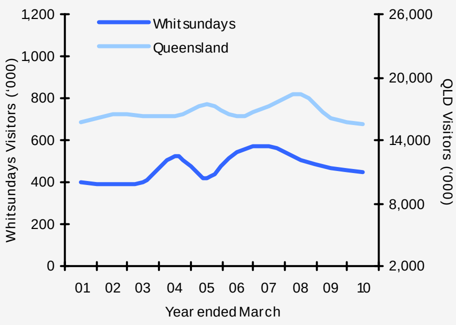
Year ended March 2010

TOURISM QUEENSLAND

www.tq.com.au/research

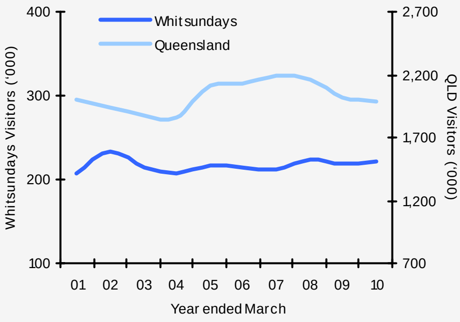
	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	449,000	311,000	80,000	35,000	n/p
Annual change[1]	▼ -3%	▼ -3%	n/p	n/p	n/p
Trend change[2]	▼ -8%	▼ -6%	▲ 6%	▼ -26%	n/p
International overnight	222,000	213,000	6,000	n/p	$163
Annual change	▲ 2%	0%	n/p	n/p	▲ 27%
Trend change	▲ 1%	▲ 1%	n/p	n/p	▲ 12%
TOTAL	671,000	524,000	n/p	n/p	n/p
Annual change	▼ -2%	▼ -2%	n/p	n/p	n/p

Domestic visitation



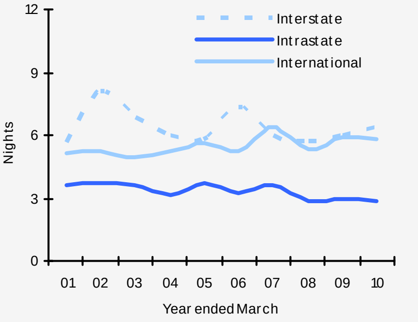
- The Whitsundays benefitted from the increase in Victorian visitors heading to the region for a holiday, although this positive result was offset by the decline in holiday visitors from Brisbane and surrounding regions (a trend seen across Queensland).
- Despite the overall decline in domestic visitation to the Whitsundays, VFR travel increased driven by visitors from local and surrounding regions.
- Similar to the state trend, it was the families that continued to travel to the Whitsundays over the year, whilst adult couples (the regions largest travel market) eased marginally. A stronger couples market from Brisbane and Melbourne off-set the Sydney decline.

International visitation



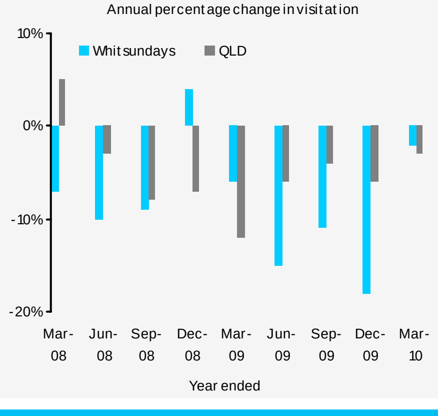
- International visitors to the Whitsundays increased, driven by an increase in visitors from the youth (under 30) markets out of the United Kingdom (UK) and United States (USA).
- The European market also increased, however the decline from Ireland continued particularly from the youth.
- Japanese holiday visitors to the Whitsundays increased, with the majority travelling to the region on honeymoon.
- The international backpacker market to the Whitsundays increased by 4% driven by the UK and German markets. The most popular accommodation type used by backpackers were backpackers or hostels and caravans.

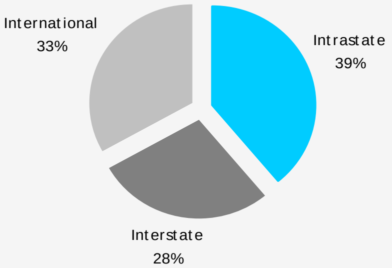
Average length of stay (Whitsundays)



- The Whitsundays in one Queensland region where domestic interstate length of stay is greater than international length of stay.
- The interstate length of stay increase was driven by Melbourne visitors staying longer, up 2.0 nights to average 8.1 nights in region.
- International visitors from the USA increased their stay in the Whitsundays (up 1.3 nights to average 5.0 nights).
- International expenditure increased 27% to $163 million driven by an increase in spend per visitor night (up to $127 per night) over the year. Total nights reduced marginally (down 1%), whilst length of stay remained relatively stable, down 0.1 nights to average 5.8 nights.

Total visitation





- There were **671,000** total overnight visitors to the Whitsundays in the year ended March 2010, this was a 2% decline on the year ended March 2009.

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?

To receive an email alert whenever new tourism figures are released email 'subscribe' to:

statsonq@tq.com.au

Whitsundays Regional Snapshot

Domestic visitation Year ended March 2010

www.tq.com.au/research

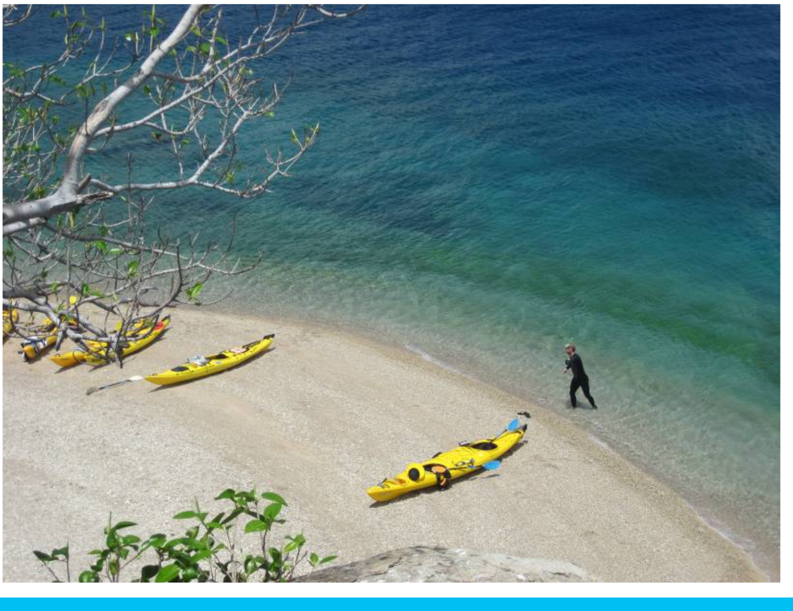
Domestic visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	311,000	-3%	1,391,000	6%	4.5	0.4
VFR	80,000	n/p	285,000	n/p	3.6	-1.4
Business	35,000	n/p	183,000	n/p	5.2	2.7
Total[3]	449,000	-3%	1,961,000	4%	4.4	0.4
Intrastate						
Holiday	168,000	-20%	525,000	-23%	3.1	-0.1
VFR	52,000	n/p	119,000	n/p	2.3	-1.1
Business	24,000	n/p	41,000	n/p	1.7	-0.2
Total	259,000	-14%	750,000	-17%	2.9	-0.1
Interstate						
Holiday	143,000	30%	867,000	37%	6.0	0.2
VFR	28,000	n/p	167,000	n/p	6.0	-0.8
Business	11,000	n/p	141,000	n/p	12.7	8.5
Total	191,000	18%	1,212,000	24%	6.4	0.4

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Whitsundays	n/p	n/p	n/p	n/p
Queensland	32,040,000	8%	$3,380	9%
Australia	147,501,000	9%	$15,095	7%

The growing trend towards day trips continues to gain momentum, with the comparative affordability of this form of travel a key influence.



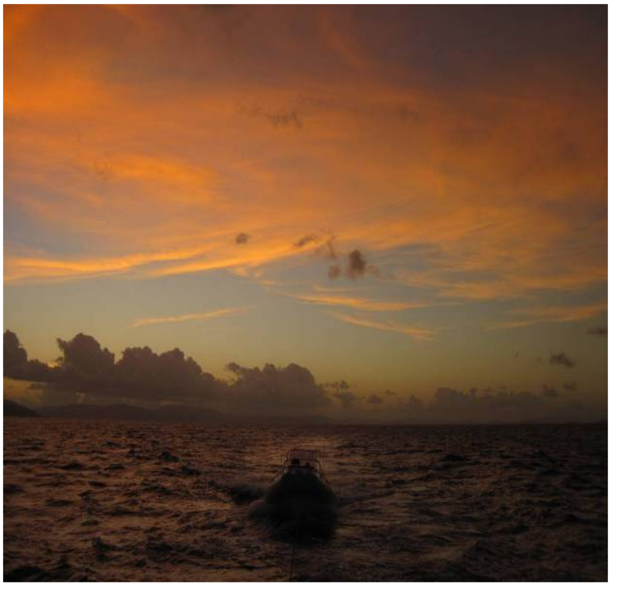
Key domestic source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
QLD	259,000	-14%	750,000	-17%
NSW	97,000	-9%	480,000	-27%
Victoria	72,000	n/p	594,000	n/p

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,531,000	-3%	69,857,000	2%
NSW	22,692,000	-2%	76,685,000	-3%
Victoria	15,856,000	-1%	50,044,000	2%
Rest of Aus	14,123,000	-5%	60,010,000	-6%
Australia	65,997,000	-3%	256,596,000	-1%
Holiday visitors				
Queensland	6,974,000	-4%	34,955,000	1%
NSW	10,262,000	0%	38,183,000	-3%
Victoria	7,478,000	1%	25,338,000	5%
Rest of Aus	6,297,000	0%	29,074,000	0%
Australia	29,912,000	-1%	127,550,000	0%

Holiday travel declined nationally, although an increase in interstate holiday visitors was recorded in Australia for the first time since 2007. QLD's holiday decline was offset by an increase in holiday nights and holiday expenditure over the year.



Whitsundays Regional Snapshot

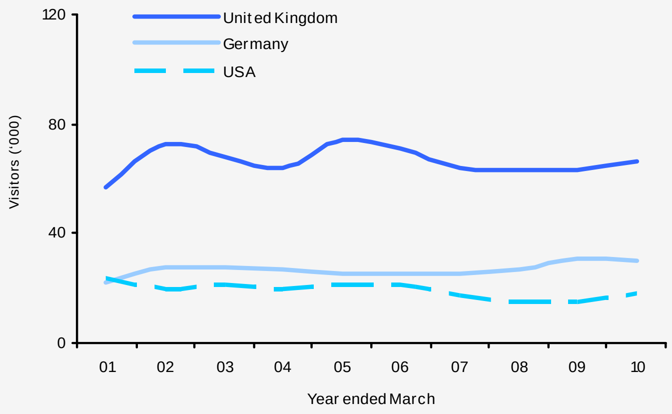
International visitation Year ended March 2010

www.tq.com.au/research

International visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	213,000	0%	1,036,000	-14%	4.9	-0.7
Total[4]	222,000	2%	1,284,000	-1%	5.8	-0.1

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



Key international source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	66,000	5%	325,000	2%
Germany	30,000	-3%	137,000	2%
United States	18,000	20%	91,000	n/p
Scandinavia	13,000	8%	103,000	n/p
Japan	11,000	83%	69,000	3%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,986,000	-2%	40,038,000	3%
NSW	2,754,000	1%	62,057,000	3%
Victoria	1,539,000	4%	39,677,000	11%
Rest of Aus	1,356,000	2%	39,021,000	6%
Australia	5,211,000	3%	180,793,000	5%
Holiday visitors				
Queensland	1,426,000	-3%	19,416,000	2%
NSW	1,569,000	2%	20,961,000	12%
Victoria	754,000	0%	8,069,000	1%
Rest of Aus	747,000	0%	12,314,000	6%
Australia	2,824,000	1%	60,759,000	6%

Queensland's more modest recovery in international visitation than the nation was driven by a subdued VFR result, and the ongoing declines from Japan. Positively however, an increase in international visitation in the March quarter 2010 (compared with the March quarter 2009) was recorded.

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

Year ended March 2010

www.tq.com.au/research

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,128,000	-11%	13,301,000	-9%	3.2	0.0	27%	42%	25%	27%
Gold Coast	3,148,000	-2%	13,512,000	-1%	4.3	0.0	62%	27%	8%	20%
Sunshine Coast	2,468,000	-8%	11,039,000	5%	4.5	0.6	63%	30%	5%	16%
SEQC[5]	2,309,000	0%	6,379,000	-7%	2.8	-0.2	39%	42%	15%	15%
TNQ	1,499,000	4%	8,030,000	17%	5.4	0.6	54%	24%	19%	10%
CQ	1,172,000	24%	4,490,000	33%	3.8	0.2	35%	30%	27%	8%
Toowoomba	1,039,000	8%	3,389,000	30%	3.3	0.6	30%	40%	24%	7%
Townsville	766,000	-9%	3,079,000	0%	4.0	0.3	41%	24%	26%	5%
Fraser Coast	734,000	-12%	2,649,000	-24%	3.6	-0.5	47%	34%	14%	5%
Mackay	590,000	-6%	2,079,000	-28%	3.5	-1.1	24%	20%	49%	4%
Capricorn	927,000	31%	3,704,000	n/p	4.0	0.7	33%	26%	31%	6%
Bundaberg	489,000	-2%	2,148,000	36%	4.4	1.2	33%	39%	15%	3%
Whitsundays	**449,000**	**-3%**	**1,961,000**	**4%**	**4.4**	**0.4**	**69%**	**18%**	**8%**	**3%**
Outback	378,000	-2%	2,163,000	16%	5.7	0.9	41%	13%	38%	2%
Gladstone	284,000	-1%	1,198,000	19%	4.2	0.7	44%	40%	9%	2%
Western Downs	281,000	-16%	926,000	-10%	3.3	0.2	33%	37%	22%	2%
Southern Downs	261,000	n/p	558,000	19%	2.1	-0.7	60%	21%	17%	2%
Total	15,531,000	-3%	69,857,000	2%	4.5	0.2	45%	32%	19%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	918,000	2%	16,043,000	2%	17.5	0.1	55%	28%	11%	46%
Gold Coast	829,000	5%	8,184,000	7%	9.9	0.2	80%	15%	4%	42%
TNQ	659,000	-9%	6,250,000	-4%	9.5	0.5	91%	5%	3%	33%
Sunshine Coast	280,000	0%	2,549,000	11%	9.1	0.9	79%	19%	2%	14%
Whitsundays	**222,000**	**2%**	**1,284,000**	**-1%**	**5.8**	**-0.1**	**96%**	**3%**	**1%**	**11%**
Fraser Coast	190,000	-4%	790,000	-11%	4.2	-0.3	95%	5%	1%	10%
Townsville	144,000	-1%	1,383,000	9%	9.6	0.9	82%	13%	3%	7%
CQ	130,000	7%	1,327,000	33%	10.2	2.0	85%	10%	5%	7%
SEQC	118,000	-1%	2,181,000	1%	18.5	0.4	42%	50%	5%	6%
Capricorn	81,000	4%	866,000	n/p	10.6	4.5	85%	10%	4%	4%
Gladstone	64,000	14%	461,000	-12%	7.2	-2.2	86%	8%	5%	3%
Mackay	55,000	4%	437,000	21%	8.0	1.2	76%	18%	4%	3%
Bundaberg	46,000	2%	633,000	10%	13.6	0.9	80%	17%	2%	2%
Toowoomba	36,000	-3%	651,000	9%	18.2	1.9	50%	33%	6%	2%
Outback	27,000	-13%	343,000	-23%	12.7	-1.4	89%	4%	4%	1%
Western Downs	12,000	0%	155,000	19%	12.8	2.4	75%	17%	0%	1%
Southern Downs	8,000	33%	165,000	2%	19.4	-5.7	75%	13%	0%	0%
Total	1,986,000	-2%	40,038,000	3%	20.2	0.9	72%	24%	8%	-

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

1. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2009.
2. Trend change refers to the percentage change between the 3 years to March 2009 vs. the 3 years to March 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.