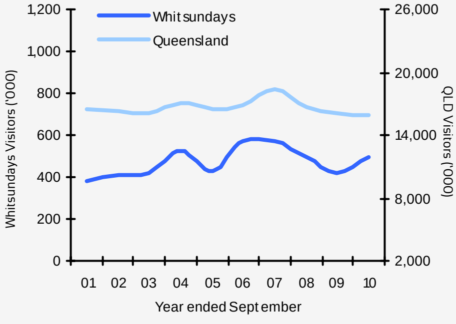
Whitsundays Regional Snapshot

Year ended September 2010

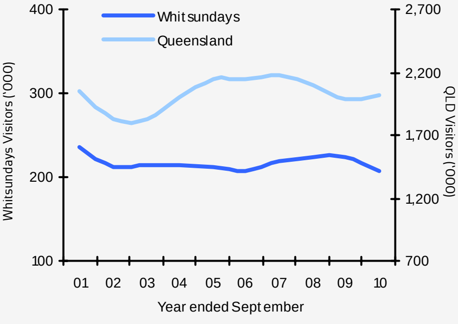
	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	498,000	353,000	72,000	54,000	n/p
Annual change[1]	▲ 20%	▲ 23%	▼ -1%	▲ 80%	n/p
Trend change[2]	▼ -5%	▼ -4%	▲ 16%	▼ -26%	n/p
International overnight	208,000	200,000	5,000	n/p	$147
Annual change	▼ -7%	▼ -7%	0%	n/p	▼ -1%
Trend change	▼ -2%	▼ -2%	▲ 8%	n/p	▲ 5%
TOTAL	706,000	553,000	77,000	n/p	n/p
Annual change	▲ 10%	▲ 10%	▼ -1%	n/p	n/p

Domestic visitation



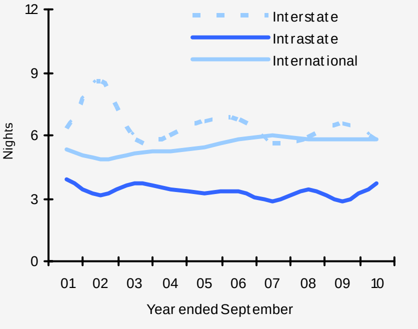
- The Whitsundays continued to see a rebound in it's domestic markets over the year, driven by a recovery in interstate travel to the region and solid growth from the intrastate market (in contrast to the state trend).
- The regions' largest source of interstate holiday-makers, Sydney and Melbourne, remained strong, perhaps motivated by more affordable airfares and package deals - with the number of visitors flying to the region from these markets also increasing.
- Similarly, families travelling to the Whitsundays for a holiday underpinned the increase in the domestic visitation overall, particularly from Brisbane and Regional Queensland.

International visitation



- The United Kingdom (UK) and European visitation declines to Queensland overall, had a significant impact on the Whitsundays' result over the year, with the region relying more heavily on visitors from these markets than many other regions in Queensland.
- The youth market (under 30 years old) spiked in visitation throughout 2008-2009 and has subsequently started to soften for the Whitsundays (and Queensland), as the economic climate in the UK and Europe continues to influence travel patterns from these markets.
- Japanese visitation increased, whilst travel from the US market eased. US visitors are making just 1 to 2 stopovers on their trip in Australia, driving the weaker results.

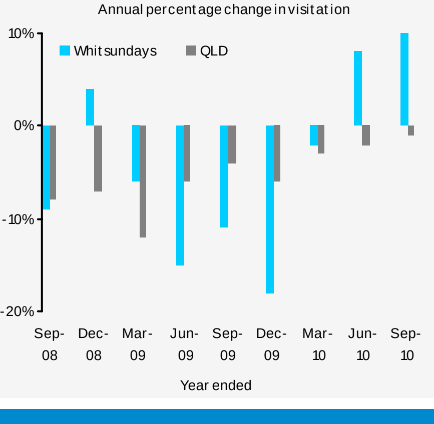
Average length of stay (Whitsundays)

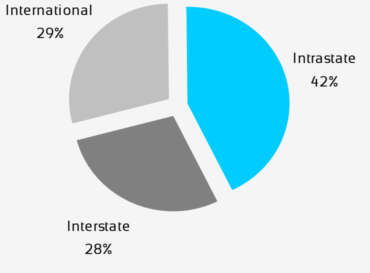


- The Whitsundays interstate length of stay matched that of international visitors with both markets averaging 5.8 nights in the region over the year.
- Interstate visitor length of stay declined, driven by VFR visitors reducing their time in region, whilst holiday visitors length of stay remained stable.
- Intrastate visitors average length of stay continued to recover and exceeded pre-GFC levels, driven by holiday visitors staying longer, to average 3.9 nights in region.
- International visitor expenditure eased as a result of the weaker UK and European markets and subsequent loss of visitor nights.

Total visitation

Annual percentage change in visitation





- There were **706,000** international and domestic overnight visitors to the Whitsundays in the year ended September 2010, this was a 10% increase on the year ended September 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.

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Whitsundays Regional Snapshot

Domestic visitation Year ended September 2010

Domestic visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	353,000	23%	1,683,000	39%	4.8	0.6
VFR	72,000	-1%	335,000	0%	4.7	0.1
Business	54,000	80%	193,000	16%	3.6	-1.9
Total[3]	498,000	20%	2,270,000	23%	4.6	0.1
Intrastate						
Holiday	188,000	13%	738,000	41%	3.9	0.7
VFR	52,000	21%	227,000	112%	4.4	1.9
Business	43,000	n/p	99,000	n/p	2.3	0.8
Total	297,000	23%	1,110,000	59%	3.7	0.8
Interstate						
Holiday	165,000	35%	945,000	38%	5.7	0.1
VFR	20,000	-33%	108,000	-53%	5.4	-2.2
Business	11,000	0%	94,000	-32%	8.2	-4.2
Total	200,000	15%	1,160,000	1%	5.8	-0.8

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Whitsundays	311,000	14%	n/p	n/p
Queensland	33,815,000	8%	$3,676	17%
Australia	151,767,000	6%	$15,520	7%

The increased trend towards day trips continued, with the comparative affordability of this type of travel a key factor.

Key domestic source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
QLD	297,000	23%	1,110,000	59%
NSW	108,000	13%	598,000	6%
Victoria	67,000	24%	431,000	2%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,960,000	-1%	70,526,000	1%
NSW	23,404,000	5%	79,719,000	4%
Victoria	15,693,000	-1%	49,976,000	1%
Rest of Aus	14,046,000	-3%	60,725,000	0%
Australia	66,834,000	1%	260,946,000	2%
Holiday visitors				
Queensland	6,969,000	-6%	34,469,000	-4%
NSW	10,420,000	3%	38,862,000	-1%
Victoria	7,341,000	-2%	24,998,000	0%
Rest of Aus	6,260,000	0%	28,635,000	0%
Australia	29,939,000	-1%	126,964,000	-1%

The business sector was the main driver for a small increase in domestic travel overall in Australia, with holiday travel easing slightly over the last year. Queensland and WA, both saw solid recovery in domestic business travel.

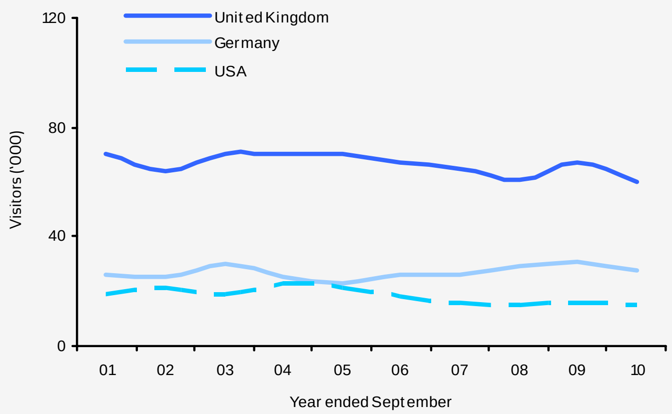
Whitsundays Regional Snapshot

International visitation Year ended September 2010

International visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	200,000	-7%	972,000	-13%	4.9	-0.3
VFR	5,000	0%	44,000	-20%	9.6	-1.5
Total[4]	208,000	-7%	1,215,000	-6%	5.8	0.0

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



Key international source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	60,000	-10%	311,000	-3%
Germany	28,000	-10%	129,000	-2%
United States	15,000	-6%	75,000	15%
Scandinavia	13,000	-7%	58,000	-41%
Netherlands	12,000	20%	47,000	-2%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,013,000	2%	39,008,000	-3%
NSW	2,835,000	7%	64,797,000	9%
Victoria	1,597,000	6%	40,403,000	7%
Rest of Aus	1,357,000	1%	40,186,000	7%
Australia	5,334,000	6%	184,395,000	6%
Holiday visitors				
Queensland	1,437,000	0%	18,079,000	-9%
NSW	1,604,000	6%	21,387,000	10%
Victoria	784,000	4%	8,656,000	9%
Rest of Aus	736,000	-2%	11,514,000	-4%
Australia	2,888,000	4%	59,636,000	1%

The return in international business travel was more prominent for NSW and VIC due to their large international business markets, subsequently fuelling the growth in international visitation seen to these states and Australia overall. While Queensland saw a more modest business recovery, the international holiday market continued to pick up.

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 September 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,306,000	-8%	14,127,000	-3%	3.3	0.2	27%	39%	27%	27%
Gold Coast	3,330,000	4%	13,372,000	-3%	4.0	-0.3	61%	27%	9%	21%
Sunshine Coast	2,539,000	-1%	10,366,000	-4%	4.1	-0.1	61%	30%	5%	16%
SEQC	2,447,000	4%	7,141,000	9%	2.9	0.1	38%	45%	11%	15%
TNQ	1,366,000	-13%	7,727,000	0%	5.7	0.8	57%	23%	17%	9%
Toowoomba	1,280,000	7%	4,069,000	15%	3.2	0.2	32%	43%	19%	8%
CQ	1,092,000	0%	3,964,000	-1%	3.6	-0.1	33%	32%	29%	7%
Capricorn	833,000	3%	3,264,000	6%	3.9	0.1	34%	28%	30%	5%
Townsville	815,000	1%	2,858,000	-17%	3.5	-0.7	28%	26%	33%	5%
Mackay	676,000	22%	2,700,000	28%	4.0	0.2	21%	25%	48%	4%
Bundaberg	554,000	8%	2,182,000	15%	3.9	0.2	35%	29%	21%	3%
Fraser Coast	546,000	-13%	2,119,000	-24%	3.9	-0.5	52%	29%	13%	3%
Whitsundays	**498,000**	**20%**	**2,270,000**	**23%**	**4.6**	**0.1**	**71%**	**14%**	**11%**	**3%**
Southern Downs	357,000	n/p	761,000	n/p	2.1	n/p	50%	33%	15%	2%
Outback	345,000	n/p	1,956,000	n/p	5.7	n/p	36%	21%	34%	2%
Gladstone	319,000	8%	1,046,000	-17%	3.3	-1.0	38%	38%	20%	2%
Western Downs	314,000	n/p	862,000	n/p	2.7	n/p	43%	29%	20%	2%
Total	15,960,000	-1%	70,526,000	1%	4.4	0.1	44%	32%	20%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	914,000	0%	16,012,000	-1%	17.5	-0.2	53%	29%	12%	45%
Gold Coast	842,000	6%	8,057,000	3%	9.6	-0.3	79%	15%	5%	42%
TNQ	672,000	1%	6,001,000	-8%	8.9	-0.9	91%	4%	3%	33%
Sunshine Coast	282,000	0%	2,479,000	-4%	8.8	-0.3	79%	18%	2%	14%
Whitsundays	**208,000**	**-7%**	**1,215,000**	**-6%**	**5.8**	**0.0**	**96%**	**2%**	**1%**	**10%**
Fraser Coast	178,000	-4%	738,000	2%	4.2	0.3	94%	5%	1%	9%
Townsville	132,000	-10%	1,451,000	9%	11.0	1.9	81%	11%	5%	7%
CQ	122,000	-5%	929,000	-19%	7.6	-1.3	87%	9%	3%	6%
SEQC	121,000	2%	1,976,000	-13%	16.4	-2.8	41%	49%	7%	6%
Capricorn	75,000	-11%	528,000	-30%	7.0	-2.0	85%	11%	4%	4%
Gladstone	62,000	2%	401,000	3%	6.5	0.1	90%	6%	3%	3%
Mackay	51,000	-6%	403,000	-11%	7.9	-0.5	76%	20%	4%	3%
Bundaberg	41,000	-20%	653,000	5%	15.9	3.6	80%	17%	0%	2%
Toowoomba	37,000	-8%	642,000	-10%	17.2	-0.5	49%	32%	11%	2%
Outback	26,000	n/p	282,000	n/p	10.7	n/p	85%	8%	4%	1%
Southern Downs	11,000	n/p	147,000	n/p	13.4	n/p	73%	18%	0%	1%
Western Downs	11,000	n/p	133,000	n/p	11.9	n/p	64%	9%	9%	1%
Total	2,013,000	2%	39,008,000	-3%	19.4	-0.8	71%	24%	8%	-

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

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