

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in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011.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

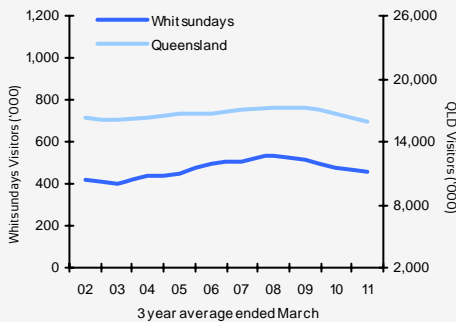
National and state level NVS data will be published as normal on a year ended basis.

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

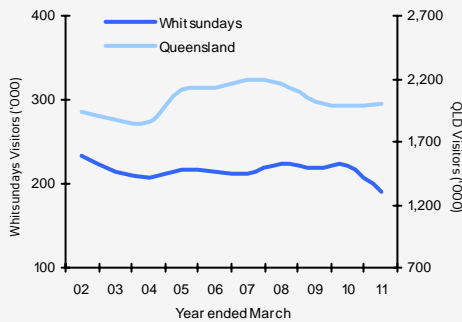


	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic overnight 3 year average	458,000	314,000	73,000	54,000	na
Trend change ¹	▼ -3%	▼ -4%	▲ 16%	▼ -13%	na
International overnight	191,000	184,000	5,000	2,000	\$116
Annual change ²	▼ -14%	▼ -14%	▼ -17%	● 0%	▼ -29%
Trend change	▼ -5%	▼ -5%	▲ 8%	▲ 25%	▼ -2%

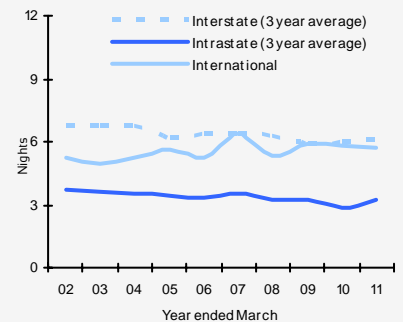
Domestic visitation



International visitation



Average length of stay (Whitsundays)



- Despite enjoying a rebound in domestic visitation in 2010, the Whitsundays is yet to fully recover to pre-GFC levels. The weather events of 2010/11 have also hampered the recovery in domestic tourism for the Whitsundays and for Queensland.

- However, the Whitsundays' largest source of interstate holiday visitors, Townsville, has remained buoyant over the last three years.

- As with many other regions, the Whitsundays witnessed a decline from the Sydney and Melbourne markets on a trend basis.

- Interstate holiday travel has declined from Sydney and Melbourne within Australia, while such residents have increased their outbound travel, particularly those from high income households.

- Continuing a pattern evident in recent quarters, the Whitsundays again saw significant declines from key European markets in the year to March 2011, none more so than the United Kingdom (UK).

- Weakness in the economies of Great Britain and many other European countries continued to impact consumer confidence and in turn discretionary spending on items including outbound travel.

- The once buoyant youth market has seen the heaviest declines, with youth unemployment remaining very high in markets such as the UK.

- Weather events and their impact on visitor dispersal within Queensland have further accentuated declines in international visitation over the year to March 2011.

- The length of stay for interstate visitors to the Whitsundays remained stable over the last three years, although there was a small decline seen in the length of stay of interstate holiday visitors.

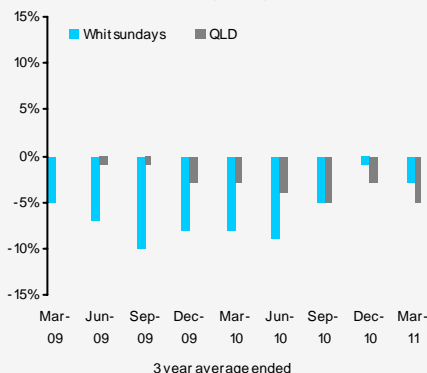
- Queenslander's continued to see the Whitsundays as an attractive short break destination spending 3 nights on average in the Whitsundays.

- International visitors continued to stay an average of 5 nights in the Whitsundays, with the regions' largest source of international visitor nights, the United Kingdom, also maintaining a consistent length of stay.

- However, international visitors on average spent less per night over the last year while in the Whitsundays.

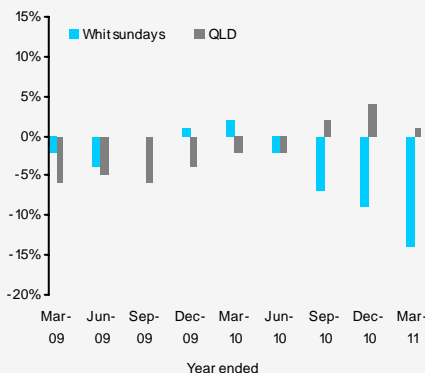
Domestic visitation

3 year percentage change in visitation



International visitation

Annual percentage change in visitation



Domestic visitation to the Whitsundays has continued to decline, this being consistent with a weaker domestic market in Queensland and Australia.

The Whitsundays' international market has seen significant declines in the number of Europeans, but has not enjoyed the growth from Asian markets seen by some regions in Queensland.

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Domestic visitation

Domestic visitors to the Whitsundays 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	314,000	-4%	1,368,000	-4%	4.4	0.0
VFR	73,000	16%	326,000	33%	4.5	0.6
Business	54,000	-13%	197,000	10%	3.6	0.8
Total³	458,000	-3%	1,973,000	1%	4.3	0.2
Intrastate						
Holiday	182,000	-3%	610,000	4%	3.4	0.2
VFR	46,000	24%	148,000	53%	3.2	0.6
Business	42,000	-11%	99,000	9%	2.4	0.4
Total	281,000	-1%	892,000	8%	3.2	0.3
Interstate						
Holiday	132,000	-6%	758,000	-11%	5.7	-0.3
VFR	27,000	8%	179,000	20%	6.6	0.7
Business	12,000	-20%	97,000	10%	8.1	2.2
Total	178,000	-6%	1,081,000	-5%	6.1	0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Whitsundays ⁴	255,000	-24%	n/p	n/p
Queensland	34,258,000	7%	\$3,627	7%
Australia	151,948,000	3%	\$14,950	-1%

Consumers remain budget conscious with global and domestic uncertainties continuing to subdue consumer confidence. As a result, domestic travellers are increasingly taking more affordable day trips, rather than overnight trips.

Key domestic source markets to the Whitsundays 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Regional Qld	210,000	-7%	634,000	5%
Brisbane	71,000	20%	258,000	16%
Sydney	66,000	-1%	401,000	8%

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%

Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.

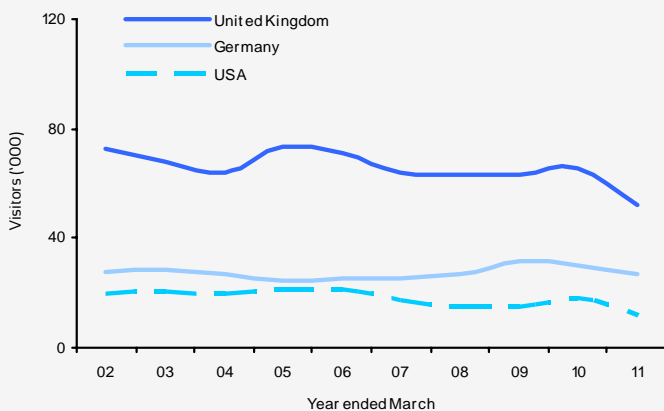


International visitation Year ended March 2011

International visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	184,000	-14%	933,000	-10%	5.1	0.2
VFR	5,000	-17%	45,000	-35%	9.0	-2.8
Total³	191,000	-14%	1,086,000	-15%	5.7	-0.1

United Kingdom, German and American visitors to the Whitsundays YE March 02 - 11



Key international source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	52,000	-21%	261,000	-20%
Germany	27,000	-10%	117,000	-15%
United States	12,000	-33%	52,000	-43%
Scandinavia	11,000	-15%	59,000	-43%
Canada	10,000	-9%	49,000	-18%

State comparison - International

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 ⁵	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 ⁵	2,866,000	1%	57,770,000	-5%

International tourism to Australia recovered in the year ending March 2011, boosted by long-haul business and visitation from China. Queensland saw similar trends, although growth was more subdued due to the decline in international holiday visitors, particularly those from the United Kingdom, New Zealand and the United States.

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.



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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 Dns	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. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.

3. This figure includes "Other" visitors.

4. 3 year average ended March 2011.

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

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.