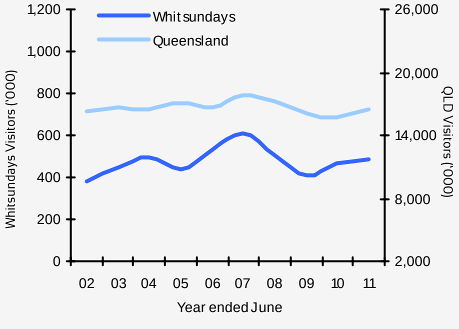
Whitsundays Regional Snapshot

Tourism Queensland

Year ended June 2011

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	490,000	319,000	122,000	42,000	n/p
Annual change[1]	▲ 6%	▲ 1%	n/p	▼ -24%	n/p
Trend change[2]	▼ -1%	▼ -2%	▲ 37%	▼ -28%	n/p
International overnight	187,000	180,000	4,000	2,000	$111
Annual change	▼ -12%	▼ -13%	n/p	n/p	▼ -30%
Trend change	▼ -6%	▼ -7%	● 0%	▲ 25%	▼ -5%
TOTAL	677,000	499,000	126,000	44,000	n/p
Annual change	● 0%	▼ -4%	▲ 68%	▼ -23%	n/p

Domestic visitation



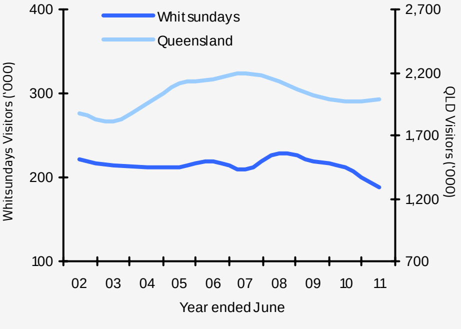
▪ The Whitsundays recorded an increase in domestic visitation, boosted by VFR (visiting friends and relatives) and holiday markets.

▪ Like other QLD regions, the Whitsundays had declines in holiday visitation from interstate markets, such as Sydney and Melbourne. However, the region had growth in family groups from Brisbane.

▪ Intrastate travel to the region increased, while interstate travel declined. Reflecting this, the number of visitors driving to the region increased. This was despite floods reducing accessibility within the state.

▪ Visitors opted for more affordable accommodation, with declines in hotels, resorts, motels and motor inns, but growth in caravans, camping and staying with friends or relatives.

International visitation



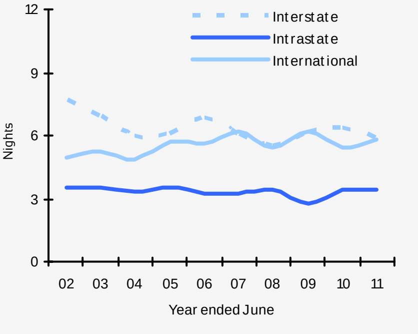
▪ International visitation to the Whitsundays declined, driven by a soft holiday market.

▪ The Whitsundays is heavily reliant on the youth market (15 to 29 years), particularly those from the United Kingdom (UK) and Europe. The region experienced a sharp downturn in UK youth visitors, a trend seen at the state level. The UK market has been weak due to soft economic conditions and high youth unemployment in the UK and a strong Australian dollar.

▪ Further contributing to the overall declines in visitation, the Whitsundays had decreases in US visitors also due to economic conditions in the US.

▪ While unaccompanied travellers declined, the region had growth in family groups.

Average length of stay (Whitsundays)



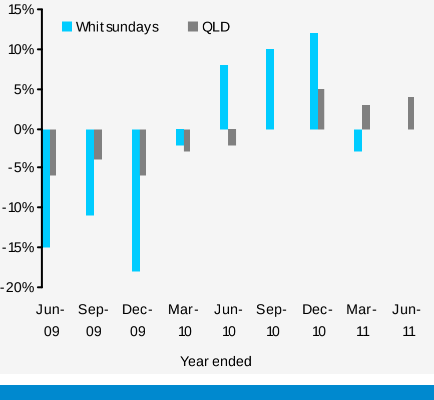
▪ The average stay of international visitors in the Whitsundays increased, driven by New Zealand travellers increasing how long they stayed in the region.

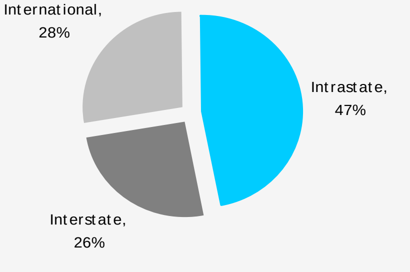
▪ In contrast, domestic visitors average stay declined, influenced by business and VFR. Intrastate visitors average length of stay was stable, however interstate stay declined, driven by Melbourne visitors.

▪ Intrastate visitors stay 3.4 nights on average in the Whitsundays, with interstate visitors staying an average of 5.9 nights and international visitors staying 5.8 nights.

▪ International visitor spend fell, the result of declines in visitation as well as spend per visitor. Travellers are remaining budget conscious, the result of low consumer confidence and a strong Australian dollar.

Total visitation





▪ There were **677,000** international and domestic overnight visitors to the Whitsundays in the year ended June 2011, this was stable from the year ended June 2010.

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Whitsundays Regional Snapshot

Domestic visitation Year ended June 2011

Domestic visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	319,000	1%	1,355,000	-5%	4.2	-0.3
VFR	122,000	n/p	524,000	n/p	4.3	-0.4
Business	42,000	-24%	161,000	-41%	3.8	-1.2
Total[3]	490,000	6%	2,080,000	-2%	4.2	-0.4
Intrastate						
Holiday	190,000	9%	608,000	-1%	3.2	-0.3
VFR	89,000	n/p	305,000	n/p	3.4	-0.7
Business	38,000	-7%	147,000	n/p	3.9	2.0
Total	317,000	14%	1,069,000	13%	3.4	0.0
Interstate						
Holiday	129,000	-9%	748,000	-8%	5.8	0.0
VFR	33,000	n/p	219,000	n/p	6.6	0.7
Business	4,000	n/p	14,000	n/p	3.1	-11.2
Total	173,000	-7%	1,012,000	-15%	5.9	-0.5

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Whitsundays	220,000	-40%	$48	-2%
Queensland	33,684,000	1%	$3,408	-5%
Australia	151,915,000	1%	$14,830	-4%

Nationally, the previous growth in day trips slowed and the amount which they spent on their trips declined. Low consumer confidence and increasing costs of living has seen domestic visitors reduce their spending on travel.

Key domestic source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional QLD	204,000	-15%	675,000	-15%
Brisbane	113,000	n/p	394,000	n/p
Sydney	57,000	-12%	335,000	-7%
Melbourne	41,000	-21%	225,000	-46%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,429,000	4%	68,489,000	-3%
NSW	24,106,000	5%	81,126,000	5%
Victoria	16,360,000	3%	50,005,000	0%
Rest of Aus	14,321,000	1%	60,310,000	-1%
Australia	68,944,000	4%	259,931,000	0%
Holiday visitors				
Queensland	6,960,000	-1%	34,008,000	-2%
NSW	10,234,000	-2%	39,375,000	2%
Victoria	7,724,000	3%	25,652,000	2%
Rest of Aus	6,130,000	-3%	28,313,000	-3%
Australia	29,904,000	-1%	127,349,000	0%

While domestic visitation has increased, these travellers are tending to stay closer to home, making less stopovers and are spending less. Even the previous rapid growth in outbound travel has slowed, particularly due to recent increases in the cost of airfares.

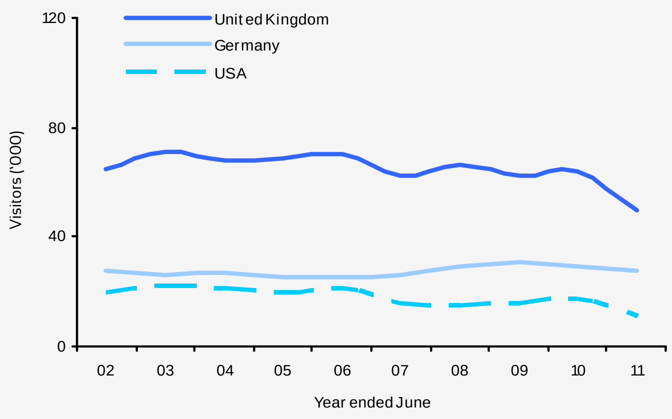
Whitsundays Regional Snapshot

International visitation Year ended June 2011

International visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	180,000	-13%	938,000	-2%	5.2	0.5
VFR	4,000	-20%	42,000	0%	9.5	0.5
Total[4]	187,000	-12%	1,086,000	-6%	5.8	0.4

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



Key international source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	50,000	-22%	259,000	-13%
Germany	28,000	-3%	123,000	-7%
United States	11,000	-35%	52,000	-36%
Scandinavia	11,000	-15%	57,000	-37%
Canada	10,000	11%	49,000	7%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,989,000	1%	39,644,000	2%
NSW	2,812,000	1%	67,436,000	7%
Victoria	1,734,000	12%	41,081,000	0%
Rest of Aus	1,415,000	5%	40,990,000	5%
Australia	5,416,000	4%	189,150,000	4%
Holiday visitors				
Queensland	1,345,000	-5%	17,724,000	-5%
NSW	1,565,000	0%	21,000,000	-1%
Victoria	842,000	12%	8,076,000	-5%
Rest of Aus	759,000	3%	11,543,000	-4%
Australia	2,861,000	1%	58,343,000	-4%

International visitation to Australia continued to grow, boosted by expanding air capacity and travel for VFR and business. Asian markets have remained buoyant, fuelled by increasing standards of living in these countries.

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 June 2011

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	5,045,000	18%	15,348,000	13%	3.0	-0.2	29%	36%	27%	31%
Gold Coast	3,300,000	1%	13,034,000	-6%	3.9	-0.3	56%	29%	10%	20%
Sunshine Coast	2,783,000	14%	10,652,000	0%	3.8	-0.5	58%	28%	10%	17%
TNQ	1,266,000	-10%	7,270,000	-6%	5.7	0.2	55%	19%	21%	8%
Toowoomba	1,250,000	0%	3,490,000	-11%	2.8	-0.4	32%	36%	23%	8%
Capricorn	837,000	1%	2,506,000	-21%	3.0	-0.8	33%	31%	26%	5%
Townsville	716,000	-9%	2,677,000	-20%	3.7	-0.5	34%	35%	24%	4%
Mackay	575,000	-4%	1,982,000	-16%	3.4	-0.6	25%	28%	37%	3%
Bundaberg	502,000	-4%	1,631,000	-17%	3.3	-0.4	33%	29%	30%	3%
Fraser Coast	495,000	-10%	1,775,000	-18%	3.6	-0.3	48%	30%	15%	3%
Whitsundays	**490,000**	**6%**	**2,080,000**	**-2%**	**4.2**	**-0.4**	**65%**	**25%**	**9%**	**3%**
Gladstone	408,000	22%	1,576,000	19%	3.9	-0.1	48%	28%	21%	2%
Western Downs	365,000	n/p	970,000	n/p	2.7	-0.2	51%	19%	24%	2%
Outback	310,000	n/p	1,565,000	n/p	5.0	-0.7	45%	15%	34%	2%
Southern Downs	298,000	n/p	751,000	n/p	2.5	0.4	50%	35%	12%	2%
Total	**16,429,000**	**4%**	**68,489,000**	**-3%**	**4.2**	**-0.3**	**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	928,000	3%	17,116,000	8%	18.5	1.0	49%	30%	14%	47%
Gold Coast	753,000	-9%	7,723,000	-4%	10.3	0.5	77%	16%	5%	38%
TNQ	649,000	-1%	5,663,000	-7%	8.7	-0.6	91%	5%	3%	33%
Sunshine Coast	260,000	-7%	2,678,000	7%	10.3	1.4	76%	20%	3%	13%
Whitsundays	**187,000**	**-12%**	**1,086,000**	**-6%**	**5.8**	**0.4**	**96%**	**2%**	**1%**	**9%**
Fraser Coast	148,000	-17%	543,000	-28%	3.7	-0.5	95%	5%	0%	7%
Townsville	120,000	-13%	1,306,000	-8%	10.9	0.6	78%	13%	5%	6%
Capricorn	68,000	-12%	530,000	-23%	7.8	-1.1	82%	10%	4%	3%
Gladstone	55,000	-14%	251,000	-40%	4.6	-2.0	85%	9%	5%	3%
Mackay	46,000	-12%	420,000	3%	9.1	1.2	74%	20%	7%	2%
Toowoomba	39,000	5%	872,000	34%	22.4	4.6	44%	33%	13%	2%
Bundaberg	39,000	-7%	735,000	14%	19.0	3.7	74%	18%	3%	2%
Outback	24,000	n/p	255,000	n/p	10.6	-1.2	71%	13%	13%	1%
Western Downs	14,000	n/p	275,000	n/p	19.5	4.3	57%	14%	7%	1%
Southern Downs	11,000	n/p	296,000	n/p	27.3	15.8	64%	18%	9%	1%
Total	**1,989,000**	**1%**	**39,644,000**	**2%**	**19.9**	**0.1**	**68%**	**25%**	**10%**	**-**

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

1. Annual change refers to the percentage change between the year ended June 2010 vs. year ended June 2011.
2. Trend change refers to the percentage change between the 3 years to June 2010 vs. the 3 years to June 2011.
3. This figure includes "Other" visitors.
4. This figure includes "VFR", "Business" and "Other" visitors.

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.