

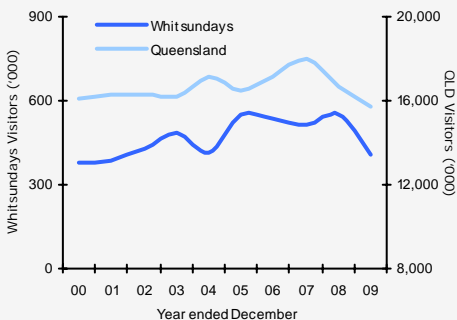
Whitsundays Regional Snapshot

Year ended December 2009



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
Domestic overnight	404,000	270,000	75,000	31,000	n/p
Annual change ¹	▼ -26%	▼ -29%	▲ 19%	n/p	n/p
Trend change ²	▼ -8%	▼ -8%	▲ 1%	▼ -17%	n/p
International overnight	223,000	215,000	6,000	n/p	\$156
Annual change	▲ 1%	0%	n/p	n/p	▲ 16%
Trend change	▲ 1%	▲ 2%	n/p	n/p	▲ 14%
TOTAL	627,000	485,000	n/p	n/p	n/p
Annual change	▼ -18%	▼ -19%	n/p	n/p	n/p

Domestic visitation



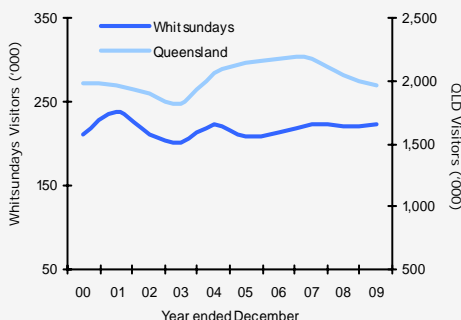
- Domestic visitation to the Whitsundays decreased 26% in 2009; with a contraction in intrastate holiday visitors propelling the decline. The travel close to home holiday trend that buoyed domestic travel to the region in previous periods seems to have eased.

- VFR travel gained momentum (up 19%) driven by visitors from local and surrounding regions.

- Interstate visitors from Victoria increased 13%, in contrast declines seen from New South Wales offset this increase as Sydneysiders constrained their domestic travel.

- 37% of visitors to the Whitsundays were couples on holiday, with families the second largest domestic market at 24% (down by a modest 1% over the year).

International visitation



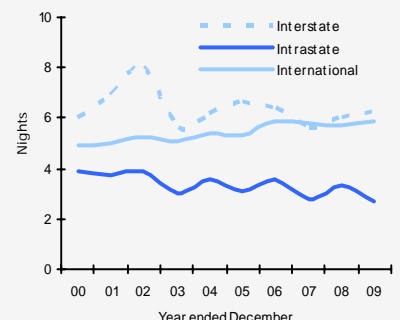
- International visitors to the Whitsundays increased 1% in the year ended December 2009, a positive sign of a more resilient international holiday market.

- Holiday visitors from the United Kingdom and Continental Europe supported the international visitor increase, a trend seen across a majority of Queensland regions.

- Similar to what was seen across the state, a large proportion (69%) of all international visitors to the Whitsundays were from the youth (under 30) market, which increased by 5% over the year.

- The Whitsundays enjoyed a return in holiday visitors from Japan, with the majority (57%) travelling to the region on honeymoon.

Average length of stay (Whitsundays)



- The Whitsundays (unlike other regions) has recorded a greater average length of stay from domestic interstate visitors compared to international visitors.

- Interstate holiday visitors from Melbourne stayed the longest, increasing 2.3 nights to average 8.4 nights.

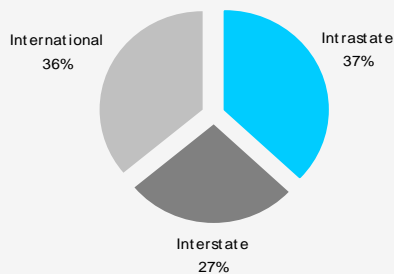
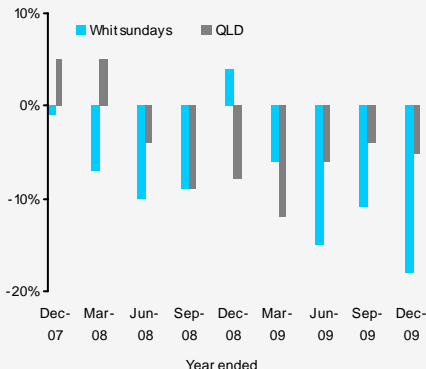
- Intrastate visitors nights reduced (down 44%), similarly average length of stay dipped (down 0.6 nights) to average 2.7 nights.

- International visitors from the United Kingdom stayed in the region the longest, up 0.3 nights to average 5.2 nights for the year ended December 2009.

- International expenditure increased by 16% to \$156 million over the year, driven by the increasing length of stay of international visitors.

Total visitation

Annual percentage change in visitation



- There were 627,000 total overnight visitors to the Whitsundays in the year ended December 2009, this was a 18% decline on the year ended December 2008.

- Outbound travel by Australian residents to Indonesia and other Asian destinations dominated departure growth in 2009, perhaps indicating that short haul holiday destinations were chosen in lieu of comparably priced domestic travel regions such as the Whitsundays.

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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Domestic visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	270,000	-29%	1,157,000	-33%	4.3	-0.2
VFR	75,000	19%	289,000	3%	3.8	-0.6
Business	31,000	n/p	157,000	n/p	5.0	2.3
Total	404,000	-26%	1,710,000	-28%	4.2	-0.2
Intrastate						
Holiday	142,000	-40%	416,000	-49%	2.9	-0.6
VFR	48,000	50%	112,000	9%	2.3	-1.0
Business	24,000	n/p	41,000	n/p	1.7	-0.4
Total	234,000	-31%	639,000	-43%	2.7	-0.6
Interstate						
Holiday	127,000	-14%	742,000	-17%	5.8	-0.3
VFR	27,000	-16%	177,000	0%	6.5	0.9
Business	7,000	n/p	116,000	n/p	15.8	11.8
Total	170,000	-19%	1,071,000	-15%	6.3	0.3

Key domestic source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
QLD	234,000	-31%	639,000	-43%
NSW	88,000	-32%	430,000	-46%
Victoria	62,000	13%	500,000	55%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,729,000	-6%	69,779,000	-3%
NSW	22,623,000	-6%	76,991,000	-6%
Victoria	15,741,000	-6%	49,451,000	-5%
Rest of Aus	14,256,000	-8%	60,459,000	-8%
Australia	66,077,000	-6%	256,680,000	-6%

Holiday visitors

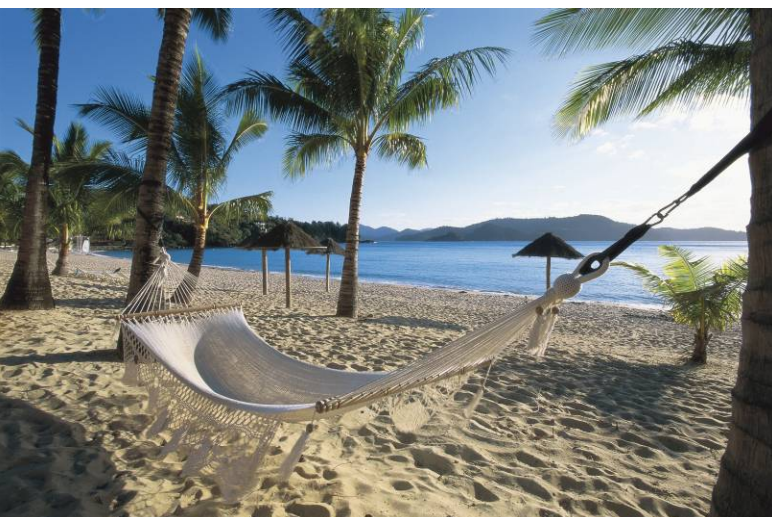
Queensland	7,369,000	-3%	36,490,000	1%
NSW	10,126,000	-4%	39,052,000	-3%
Victoria	7,368,000	-8%	24,641,000	-8%
Rest of Aus	6,202,000	-7%	28,879,000	-7%
Australia	29,945,000	-6%	129,062,000	-4%

QLD's overall change in visitation was on par with that seen nationally, however QLD's stability in intrastate holiday visitors, and growth in intrastate holiday nights was not seen in other states.

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Whitsundays	n/p	n/p	n/p	n/p
Queensland	31,575,000	11%	\$3,216	2%
Australia	144,393,000	6%	\$14,683	2%

Nationally, and in QLD the popularity of day trips continued to grow in 2009, with the comparative affordability of this form of travel a key influence.



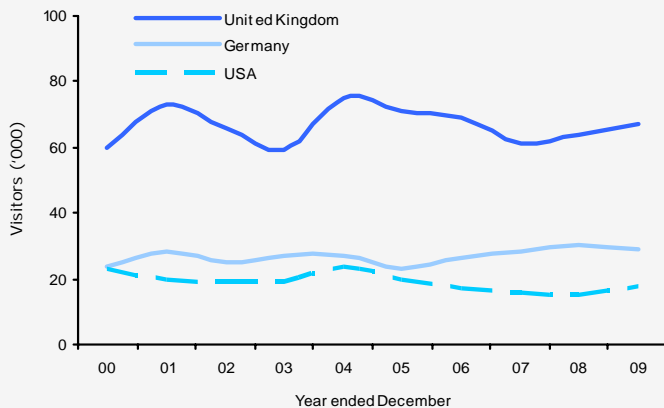
International visitors to the Whitsundays

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	215,000	0%	1,105,000	-6%	5.1	-0.3
Total	223,000	1%	1,308,000	5%	5.9	0.2

Key international source markets to the Whitsundays

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	67,000	5%	349,000	13%
Germany	29,000	-3%	123,000	-19%
United States	18,000	20%	75,000	42%
Scandinavia	14,000	17%	104,000	41%
Canada	12,000	0%	63,000	-50%

United Kingdom, German and American visitors to the Whitsundays YE December 00 - 09



State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,968,000	-4%	39,075,000	-4%
NSW	2,711,000	-2%	61,293,000	6%
Victoria	1,531,000	4%	38,368,000	14%
Rest of Aus	1,354,000	1%	37,860,000	8%
Australia	5,131,000	0%	176,596,000	6%

Holiday visitors				
Queensland	1,418,000	-5%	19,605,000	5%
NSW	1,546,000	-1%	20,140,000	13%
Victoria	772,000	1%	8,141,000	4%
Rest of Aus	758,000	-1%	11,970,000	5%
Australia	2,799,000	-2%	59,856,000	7%

As occurred nationally, QLD recorded an increase in VFR visitors, and a decline in holiday visitors. Unlike the nation however, the increase in VFR visitors was not sufficient to offset the declines in holiday visitors. QLD's decline in holiday visitors was driven by a decrease in Japanese visitors.

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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Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,176,000	-11%	13,136,000	-12%	3.1	-0.1	29%	40%	24%	27%
Gold Coast	3,206,000	-3%	13,552,000	-4%	4.2	-0.1	62%	27%	8%	20%
Sunshine Coast	2,680,000	-4%	11,593,000	7%	4.3	0.4	64%	28%	6%	17%
SEQC ³	2,264,000	-9%	6,258,000	-14%	2.8	-0.1	40%	41%	15%	14%
TNQ	1,521,000	1%	7,868,000	6%	5.2	0.3	54%	23%	18%	10%
CQ	1,130,000	17%	4,456,000	42%	3.9	0.7	39%	29%	23%	7%
Toowoomba	1,016,000	-5%	3,427,000	19%	3.4	0.7	32%	38%	24%	6%
Fraser Coast	785,000	-2%	3,105,000	1%	4.0	0.2	51%	35%	11%	5%
Townsville	757,000	-10%	3,018,000	0%	4.0	0.4	40%	25%	29%	5%
Capricorn	568,000	-22%	2,338,000	2%	4.1	0.9	38%	29%	20%	4%
Mackay	550,000	-12%	1,984,000	-38%	3.6	-1.5	26%	27%	40%	3%
Bundaberg	516,000	-13%	2,129,000	12%	4.1	0.9	37%	43%	13%	3%
Whitsundays	404,000	-26%	1,710,000	-28%	4.2	-0.2	67%	19%	8%	3%
Outback	362,000	-13%	1,982,000	-8%	5.5	0.3	42%	12%	37%	2%
Gladstone	322,000	13%	1,464,000	n/p	4.5	1.5	51%	34%	9%	2%
Western Downs	278,000	-30%	1,019,000	2%	3.7	1.2	34%	32%	28%	2%
Southern Downs	223,000	1%	473,000	-28%	2.1	-0.9	57%	21%	19%	1%
QLD	15,729,000	-6%	69,779,000	-3%	4.4	0.1	47%	32%	18%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	913,000	2%	15,558,000	-7%	17.0	-1.6	56%	28%	11%	46%
Gold Coast	813,000	2%	7,715,000	-6%	9.5	-0.8	80%	15%	4%	41%
TNQ	651,000	-14%	6,236,000	-3%	9.6	1.1	91%	5%	2%	33%
Sunshine Coast	277,000	-1%	2,550,000	9%	9.2	0.8	79%	18%	2%	14%
Whitsundays	223,000	1%	1,308,000	5%	5.9	0.2	96%	3%	1%	11%
Fraser Coast	191,000	-5%	753,000	-15%	4.0	-0.4	95%	4%	0%	10%
Townsville	142,000	-2%	1,336,000	7%	9.4	0.8	82%	13%	2%	7%
CQ	128,000	9%	1,304,000	35%	10.2	1.9	85%	9%	4%	7%
SEQC ³	117,000	4%	2,082,000	6%	17.8	0.4	40%	52%	5%	6%
Capricorn	74,000	0%	609,000	14%	8.2	1.0	86%	7%	3%	4%
Gladstone	61,000	11%	502,000	16%	8.2	0.3	85%	8%	3%	3%
Mackay	54,000	6%	491,000	n/p	9.1	3.6	76%	19%	6%	3%
Bundaberg	50,000	22%	687,000	29%	13.9	1.0	78%	18%	2%	3%
Toowoomba	36,000	-3%	593,000	1%	16.5	0.4	47%	33%	11%	2%
Outback	27,000	-16%	354,000	-4%	13.2	1.7	85%	4%	4%	1%
Western Downs	12,000	0%	162,000	42%	13.4	4.0	75%	17%	8%	1%
Southern Downs	9,000	50%	190,000	52%	20.7	-1.2	78%	11%	0%	0%
QLD	1,968,000	-4%	39,075,000	-4%	19.9	0.1	72%	24%	8%	-

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

1. Annual change refers to the percentage change between the year ended December 2009 vs. year ended December 2008.

2. Trend change refers to the percentage change between the 3 years to December 2008 vs. the 3 years to December 2009.

3. South East Queensland Country.

n/p – not published.