

Whitsundays Region Snapshot

Year ended June 2006

This publication provides a brief update of tourism performance in the Whitsundays region in the last year. More comprehensive information can be found in the Whitsundays Regional Update for the year ended December 2005. www.tq.com.au/research

Total Visitation Last 12 Months**

	Total	Holiday
Visitors	↑ 14.2%	↑ 5.5%
Nights	↑ 12.9%	↑ 5.8%
Average Length Of Stay	↓ -0.1 nights	↔ 0.0 nights

Domestic Visitation Last 12 Months*

	Total	Holiday
Visitors	↑ 19.7%	↑ 7.2%
Nights	↑ 20.0%	↑ 11.3%
Average Length Of Stay	↔ 0.0 nights	↑ 0.1 nights

International Visitation Last 12 Months

	Total	Holiday
Visitors	↑ 2.9%	↑ 2.9%
Nights	↑ 1.2%	↓ -1.9%
Average Length Of Stay	↓ -0.1 nights	↑ 0.2 nights

Total Visitation Last 12 Months**

Over the last year, total visitor numbers to the Whitsundays have increased (up 14%), visitor nights also increased, however at a lesser rate (up 13%). Most travellers were domestic and the majority of domestic travellers were from within Queensland. The domestic market drove the overall increase.

The increase was driven namely by the holiday market, as this market accounts for 73% of all visitors to the region and both holiday visitors and holiday visitor nights increased over the last year.

Domestic Visitation Last 12 Months**

In the last year, 71% or 522,000 of visitors to the Whitsundays were domestic visitors. These visitors spent 2,421,000 nights in the region, staying for an average of 4.6 nights (no change on the year ended June 2005).

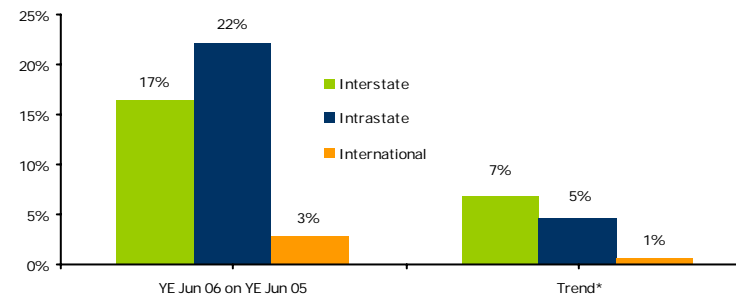
Domestic visitation experienced strong growth over the year June 2006, as did visitor nights. The increase was driven by the intrastate market, with Queenslanders visiting the region increasing by 22% over the last year. Additionally interstate visitor nights were up by 25%.

International Visitation Last 12 Months

International visitors to the Whitsundays accounted for 10% of all visitors to Queensland, or 218,200 visitors. These visitors stayed for over 1.2 million nights (1,216,500), which was a slight increase (up 1%) on the previous year.

The 3% increase in international visitors to the Whitsundays region in the last year was higher than the States international growth, as Queensland's international visitation increased by 1% over the last year.

Total Visitors to the Whitsundays Year on Year and Trend*



*Trend – year ending June 2003 – year ending June 2006

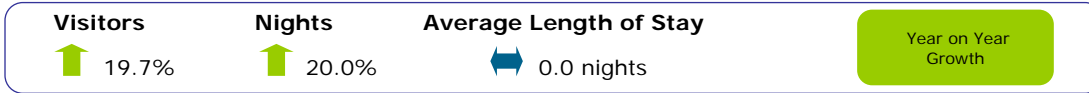
**An outlier has been removed from the year ended June 2006 NVS data.

Tourism Research Australia – National and International Visitor Surveys

Whitsundays Region Snapshot

Year ended June 2006

Domestic Profile**



Where is the increase coming from?

It was the Regional Queensland and NSW markets that drove the domestic market increase to the Whitsundays over the last year. Intrastate visitors from outside of Brisbane accounted for 44% of all domestic visitors to the region, and 28% of domestic visitors nights, and increased by 19% and 25% respectively.

Visitors from NSW increased by 17% over the last year, while their nights increased by 11%. NSW visitors accounted for almost a quarter of domestic visitors (24%), and spent more nights in the region than visitors from regional Queensland.

Comparing Interstate with Intrastate Visitors

Intrastate visitors accounted for 58% of the domestic market to the region and 41% of the visitor nights. This source market drove the domestic visitor increase. Queenslanders to the Whitsunday region increased by 22% over the last year and nights were up by 14%.

The interstate market drove the increase in nights, as visitors from outside the state accounted for 59% of the domestic visitor nights and increased by 25% over the last year.

Why are visitors coming to the Whitsundays?

The Whitsundays has a significant domestic holiday market, with these visitors representing a higher proportion of domestic travellers to the Whitsundays (63%) than to Queensland as whole (43%). Domestic holiday visitor nights represented 67% of all domestic nights to the region and increased by 11% over the last year.

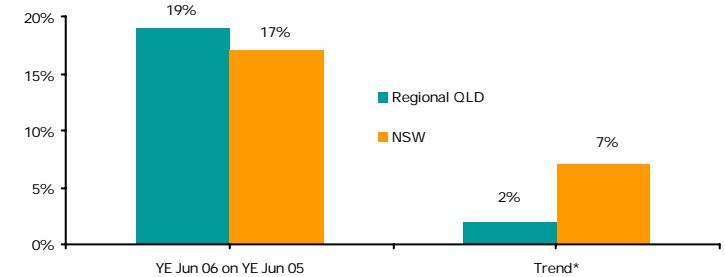
Business visitors accounted for 21% of the domestic market, while visiting friends and relatives (VFR) visitors only accounted for 13%. Business visitors represented 17% of the domestic visitor nights spent in the region, and VFR visitors accounted for a smaller 11%.

Where do they stay and how do they get there?

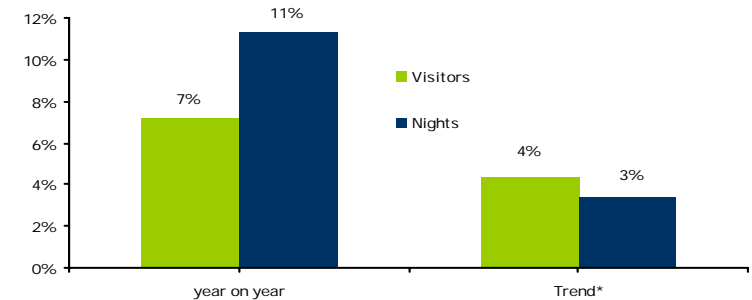
Just under half (49%) of domestic visitors nights were spent in a hotel, motel or resort. Over the last year domestic nights spent in a hotel, motel or resort increased strongly.

Just over half (52%) of domestic visitors drove to the region, while a high percentage travelled by air (43%). Domestic visitors who travel to the region by air increased by 41% over the last year, this was influenced by a large increase in airline seat capacity to the region (Hamilton Island airport up 22% from June 2005).

Whitsundays Top 2 Domestic Source Markets



Whitsundays Domestic Holiday Visitors



*Trend – year ending June 2003 – year ending June 2006

**An outlier has been removed from the year ended June 2006 NVS data.

Whitsundays Region Snapshot

Year ended June 2006

International Profile

Visitors  2.9%	Nights  1.2%	Average Length of Stay  -0.1 nights	Year on Year Growth
			

Where did the increase come from?

International visitors increased largely as a result of an increase in the holiday market. Although there were more international visitors (compared to the previous year), those who did visit stayed for a shorter time, with a slight drop in visitor nights – holiday visitor nights declined slightly more (down 0.2 nights).

The increase in nights was not driven by the holiday market (as was visitor numbers), international business visitor nights increased over the last year while holiday nights declined (down 2% over the last year).

Which source markets influenced the visitor increase?

The United Kingdom was the Whitsundays largest source market in both the year ended June 2005 and 2006, representing 33% and 32% of international visitors respectively. Over the last year visitors from the United Kingdom only increased by 2% and there was no change in visitor nights.

The international source markets that drove the visitor and visitor nights increase were Europe (excluding the United Kingdom and Germany) and New Zealand. Visitors from Europe represented 26% of international visitors and one quarter (25%) of the visitor nights. Visitors from Europe boosted visitation, while nights from New Zealand increased overall international visitor nights. Although visitors from New Zealand only represent 7% of international visitors to the region and 13% of the international visitor nights, the increase was significant enough to boost the overall international growth.

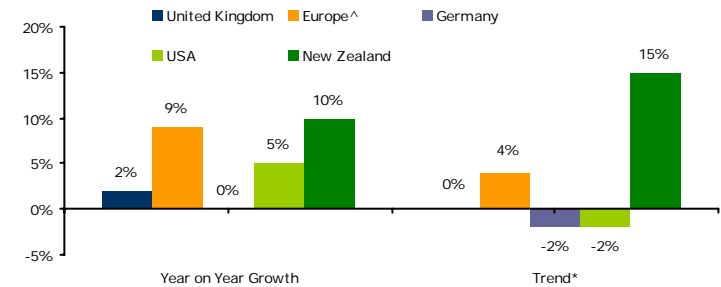
Where do they stay and how do they get there?

Two in five (42%) international visitor nights were spent in a backpacker or hostel, while only 18% of international visitor nights were spent in a hotel, motel or resort. International visitor nights spent in a hotel, motel or resort increased over the last year (up 2%) nights spent in a backpacker or hostel also increased (up 8%).

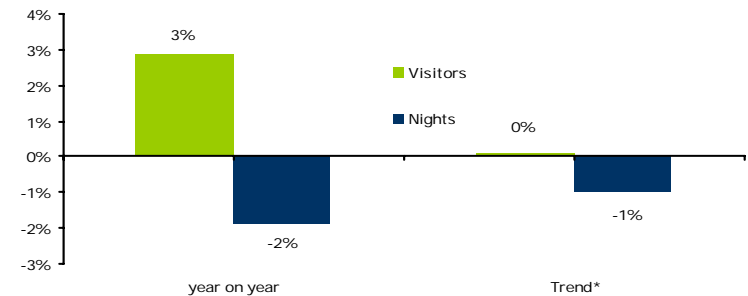
The Whitsundays hosts a large number of international backpackers, with 62% of international visitors being classed as a backpacker in the year ended June 2006 (having spent at least one night in a backpacker or hostel). International backpacker visitors and visitor nights to the region increased by 1% and 2% over the last year.

Just under one third of all international visitors to the Whitsundays travelled by private or rented vehicle (31%), this market increased by 1% over the last year. International visitors travelling by air (18%) increased by 24% over the last year.

Whitsundays Top 5 International Source Markets



Whitsundays International Holiday Visitors



Whitsundays Region Snapshot

Year ended June 2006

Visitor and Accommodation Profile

Which visitor age groups declined and which increased?

The Whitsundays mostly attracts younger visitors to the region, as the largest age group market were aged from 25 to 44 year (44%), the second largest age group was the 15 to 24 years market (25%).

Both the younger age group markets showed a strong increase over the last year, the 15 to 24 years market increased by 26% while the 25 to 44 years market increased by 19%. Only the 45 to 64 years market showed a decline (down 4% over the last year).

Four out of every five international visitors to the Whitsundays was under 44 years of age, 39% were aged 15 to 24 while 41% were aged 25 to 44 years. This is inline with the large percentage of international backpackers to the region as the typical backpacker is under 40 years of age.

How have travel parties changed?

Two in five (42%) domestic visitors to the Whitsundays region were travelling as an adult couple and this market increased by 35% in the last year. Families accounted for 20% of domestic visitors to the region and increased by 27% since June 2005.

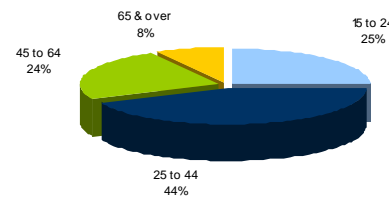
Many international visitors were travelling alone (44%), this market declined by 3% over the last year. International friends and/or relatives travelling together accounted for 20% of the international market. This was the only international travel party type to increase over the last year (up 22%).

How has the commercial accommodation market performed?^

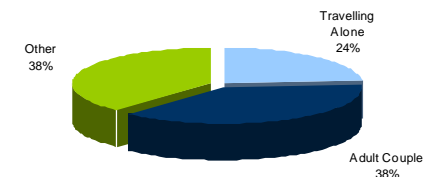
In the year to June 2006 commercial accommodation in the region recorded healthy growth in takings from accommodation, room occupancy, average daily room rates and yield. Despite a 4.9 percentage point increase in room occupancy rate in the three years to June 2006, the Whitsunday region's average daily occupancy rate of 62.9% is below the Queensland average daily occupancy rate of 66.7%.

Takings from accommodation were up 10%, while room occupancy increased 1.7 percentage points to average 62.9%. Additionally, the average daily room rate increased by 3%. This was the highest average daily room rate of all Queensland regions and was \$64.31 more than the average daily room rate of Queensland establishments. During the year, yield also increased by 6%.

Total Visitors to the Whitsundays by Age Group



Total Visitors to the Whitsundays by Travel Party



Accommodation by Establishment Type – Whitsundays (15+ ROOMS) vs. QLD

	Licensed Hotels	Total Establishments	QLD Total Establishments
Room Nights Available	742,692	1,020,292	20,764,048
% Change – Room Nights Available (June 05-06)	↑ 2.3%	↑ 3.6%	↑ 1.6%
Room Nights Occupied	481,620	642,232	13,853,940
% Change – Room Nights Sold (YE Jun 05-06)	↑ 4.5%	↑ 6.6%	↑ 3.0%
Av. Daily Room Rate	\$213.53	\$191.78	\$127.47
Change – Av. Daily Room Rate (YE Jun 05-06)	↑ \$9.06	↑ \$6.44	↑ \$6.17
Occupancy Rate	64.9%	62.9%	66.7%
Percentage Point Change – Occupancy (YE Jun 05-06)	↑ 1.4%	↑ 1.7%	↑ 0.9%

Whitsundays Region Snapshot

Year ended June 2006

Data Sources

Tourism Research Australia, National and International Visitor Survey

Research used in the Regional Snapshot, such as that conducted by Tourism Research Australia, has inherent weaknesses resulting from the process of sampling. Where only a portion of the entire population of visitors is surveyed, Tourism Queensland cannot be 100% certain that the information collected is a perfect reflection of the total population.

The size of the standard error* must be considered when analysing information contained within this publication. The standard error that is applicable to the Whitsundays region at the 95% confidence interval is as follows:

International 95% confidence interval, percentage of estimate is 30%, and domestic 95% confidence interval, percentage of estimate is 17% (as at YE December 2005). This means that there are 95 chances in 100 that the number of international visitor nights spent in the Whitsundays will be within the range of plus or minus 30%, and there are 95 chances in 100 that the number of domestic visitor nights spent in the Whitsundays will be within the range of plus or minus 17%.

Survey of Tourist Accommodation (STA)

The Survey of Tourist Accommodation, conducted by Australian Bureau of Statistics, is a quarterly survey of all establishments which provide predominantly short-term accommodation (i.e. for less than two months) to the general public. From March 2005, the scope of the survey expanded to include establishments with 5 or more rooms. Prior to this the survey was based on establishments with 15 or more rooms.

The survey provides information relating to the following categories:

1. Licensed hotels with facilities;
2. Motels and guesthouses with facilities; and
3. Serviced apartments (daily servicing must be available, although this service may not necessarily be used).

Further Information

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* The 2006 standard error data was not available at the time of publishing