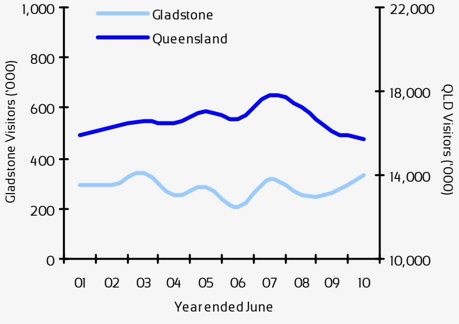
Gladstone Regional Snapshot

Year ended June 2010

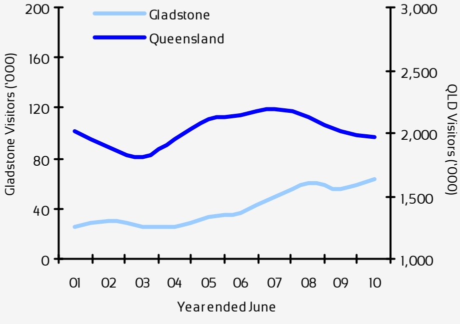
	Visitors	Holiday	VFR	Business
Domestic overnight	334,000	129,000	133,000	53,000
Annual change[1]	▲ 27%	▼ -4%	n/p	▼ -7%
Trend change[2]	▲ 2%	▲ 15%	0%	▼ -9%
International overnight	64,000	57,000	n/p	n/p
Annual change	▲ 14%	▲ 14%	n/p	n/p
Trend change	▲ 8%	▲ 9%	n/p	n/p
TOTAL	398,000	186,000	n/p	n/p
Annual change	▲ 25%	▲ 1%	n/p	n/p

Domestic visitation



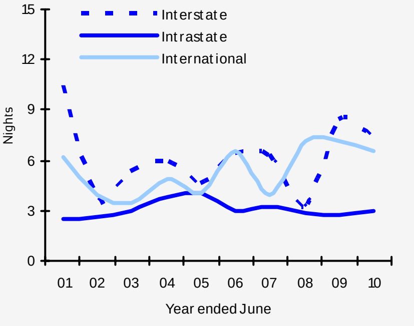
- The domestic market in Queensland has shifted away from the 'travel close to home' trend seen in 2009, with Queenslanders now travelling further for a holiday.
- Brisbane and regional Queensland residents returned to the Gladstone to visit friends or relatives, however holiday travel remained softer over the same period. The Central Queensland region saw an increase in Brisbane holiday visitors over the year, a positive sign for the Gladstone region.
- The interstate holiday market increased travel to Gladstone (and Queensland) over the year, a trend also seen to the Capricorn and Central Queensland regions.

International visitation



- The upward trend in international visitation to Gladstone continued over the year, in contrast to Queensland's decline.
- Gladstone's dominant United Kingdom (UK) and European youth markets (under 30 years old) drove the regions increase, whilst Queensland's overall decline continued to be influenced by the Japanese holiday declines.
- The youth market proved the more resilient travellers to Queensland throughout 2009 and this has supported Gladstone's positive result. 63% of Gladstone's international market, are youth visitors. In contrast, Queensland youth market represented 35% of all international visitors to the state.

Average length of stay (Gladstone)



- The spike in interstate length of stay seen during 2009 has now softened, with interstate visitors averaging 7.3 nights in Gladstone over the year ended June 2010.
- Intrastate length of stay recovered marginally, however continued to hover around 3 nights, hinting that short break trips remained prominent, driven by affordability.
- International visitor length of stay declined, driven by a downturn in the number of working holiday and employment visitors staying in the region.

Tourist Accommodation[3]

	Hotels/Motels/Serviced apartments[4]
Guest arrivals	97,187
Annual change	-6%
Room occupancy	48.6%
Percentage point change	-13.1%
Average room rate	$114.15
Annual change	2%
Yield[5]	$55.52
Annual change	-20%

- Whilst overall visitation to Gladstone increased by 25% in the year ending June 2010, the number of visitors staying in hotels, motels or serviced apartments declined by 6%.
- This indicates that there was an increase in the number of visitors staying in non-commercial accommodation (such as in the home of friend or relative)

For more information on commercial accommodation for the region, please refer to the 'Tourist Accommodation Data Sheet' available on the Tourism Queensland website.

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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Gladstone Regional Snapshot

Domestic visitation Year ended June 2010

Domestic visitors to Gladstone

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	129,000	-4%	624,000	39%	4.8	1.5
VFR	133,000	n/p	442,000	n/p	3.3	-0.3
Business	53,000	-7%	219,000	-15%	4.2	-0.4
Total[6]	334,000	27%	1,326,000	37%	4.0	0.3
Intrastate						
Holiday	86,000	-30%	249,000	-34%	2.9	-0.2
VFR	123,000	n/p	377,000	n/p	3.1	-0.1
Business	40,000	-7%	121,000	n/p	3.0	2.0
Total	255,000	16%	754,000	27%	3.0	0.3
Interstate						
Total	79,000	n/p	572,000	n/p	7.3	-1.1

Domestic day trip visitors

	Day trip visitors	Annual % Change	Expenditure ($) million	Annual % change
Gladstone	n/p	n/p	n/p	n/p
Queensland	33,512,000	7%	$3,604	14%
Australia	150,963,000	7%	$15,518	7%

The growing trend towards day trips continued, with the comparative affordability of this form of travel a key influence.

Key domestic source markets to Gladstone

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	174,000	8%	501,000	18%
Brisbane	81,000	40%	253,000	50%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,726,000	-2%	70,814,000	5%
NSW	22,896,000	2%	76,966,000	-1%
Victoria	15,942,000	0%	50,255,000	2%
Rest of Aus	14,151,000	-4%	60,694,000	-4%
Australia	66,404,000	-1%	258,729,000	0%
Holiday visitors				
Queensland	7,017,000	-4%	34,643,000	0%
NSW	10,465,000	4%	38,523,000	-2%
Victoria	7,500,000	1%	25,058,000	2%
Rest of Aus	6,332,000	-1%	29,114,000	-1%
Australia	30,252,000	1%	127,338,000	-1%

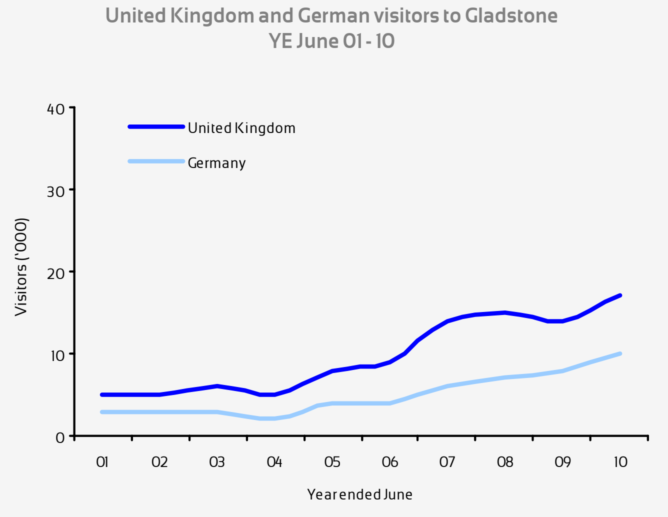
The 'travel close to home' trend that buoyed Queensland's domestic results from mid 2009 has eased, with the number of Queenslanders taking an interstate trip gaining momentum. This increase in interstate travel has resulted in weaker domestic results for Queensland over the year.

Gladstone Regional Snapshot

International visitation Year ended June 2010

International visitors to Gladstone

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	57,000	14%	198,000	-10%	3.5	-0.9
Total[7]	64,000	14%	421,000	4%	6.6	-0.6



Key international source markets to Gladstone

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	17,000	21%	66,000	10%
Germany	10,000	25%	25,000	n/p

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,970,000	-2%	39,011,000	-2%
NSW	2,782,000	3%	63,241,000	4%
Victoria	1,548,000	5%	40,950,000	14%
Rest of Aus	1,348,000	0%	38,937,000	4%
Australia	5,232,000	3%	182,139,000	5%
Holiday visitors				
Queensland	1,415,000	-3%	18,643,000	-4%
NSW	1,569,000	3%	21,311,000	10%
Victoria	752,000	1%	8,497,000	9%
Rest of Aus	735,000	-3%	12,025,000	0%
Australia	2,826,000	1%	60,475,000	3%

Economic recovery is continuing across the globe although the effects of the GFC linger for many countries. Competitive airfares from most of Australia's major source markets, offset much of the hangover from the GFC in stimulating travel to Australia. Combined with an expansion in air capacity on some routes has further supported international visitation to Australia.

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

Gladstone region includes the city of Gladstone and former shires of Banana, Calliope, Miriam Vale and Monto.

Gladstone Regional Snapshot

Tourism Queensland

Year ended June 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,260,000	-8%	13,639,000	-7%	3.2	0.0	27%	40%	26%	27%
Gold Coast	3,270,000	3%	13,898,000	4%	4.2	0.0	64%	26%	8%	21%
Sunshine Coast	2,439,000	-6%	10,602,000	3%	4.3	0.3	61%	32%	5%	16%
SEQC[8]	2,408,000	3%	6,789,000	1%	2.8	-0.1	38%	44%	13%	15%
TNQ	1,412,000	-7%	7,751,000	7%	5.5	0.7	55%	27%	16%	9%
Central Queensland	1,128,000	13%	4,496,000	28%	4.0	0.5	37%	30%	26%	7%
Toowoomba	1,047,000	6%	3,373,000	22%	3.2	0.4	32%	41%	20%	7%
Capricorn	832,000	12%	3,582,000	48%	4.3	1.0	37%	25%	29%	5%
Townsville	787,000	-8%	3,332,000	13%	4.2	0.8	31%	26%	30%	5%
Fraser Coast	752,000	-11%	2,673,000	-26%	3.6	-0.6	47%	33%	14%	5%
Mackay	597,000	3%	2,367,000	-12%	4.0	-0.7	24%	24%	46%	4%
Bundaberg	524,000	8%	1,959,000	11%	3.7	0.1	32%	39%	15%	3%
Whitsundays	463,000	14%	2,131,000	25%	4.6	0.4	68%	15%	12%	3%
Outback	364,000	n/p	2,070,000	n/p	5.7	1.1	32%	17%	43%	2%
Southern Downs	338,000	n/p	715,000	n/p	2.1	-0.5	50%	33%	16%	2%
Gladstone	**334,000**	**27%**	**1,326,000**	**37%**	**4.0**	**0.3**	**39%**	**40%**	**16%**	**2%**
Western Downs	293,000	n/p	844,000	n/p	2.9	-0.2	33%	31%	28%	2%
Total	15,726,000	-2%	70,814,000	5%	4.5	0.3	45%	33%	19%	-

International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	901,000	-2%	15,814,000	-2%	17.5	0.0	54%	29%	12%	46%
Gold Coast	826,000	5%	8,054,000	4%	9.8	0.0	79%	15%	4%	42%
TNQ	654,000	-7%	6,091,000	-7%	9.3	-0.1	91%	4%	2%	33%
Sunshine Coast	280,000	1%	2,496,000	7%	8.9	0.5	80%	18%	2%	14%
Whitsundays	213,000	-2%	1,153,000	-15%	5.4	-0.8	97%	2%	1%	11%
Fraser Coast	181,000	-8%	797,000	-7%	4.4	0.1	94%	6%	1%	9%
Townsville	138,000	-6%	1,421,000	7%	10.3	1.3	80%	13%	4%	7%
Central Queensland	125,000	-1%	1,111,000	4%	8.9	0.5	86%	10%	4%	6%
SEQC[8]	118,000	0%	1,975,000	-15%	16.8	-2.8	42%	50%	6%	6%
Capricorn	77,000	-8%	690,000	4%	8.9	1.0	86%	10%	4%	4%
Gladstone	**64,000**	**14%**	**421,000**	**4%**	**6.6**	**-0.6**	**89%**	**6%**	**3%**	**3%**
Mackay	52,000	-5%	409,000	1%	7.9	0.6	77%	21%	4%	3%
Bundaberg	42,000	-14%	646,000	0%	15.3	2.2	83%	14%	0%	2%
Toowoomba	33,000	-11%	613,000	4%	18.4	2.3	48%	33%	9%	2%
Outback	25,000	n/p	302,000	n/p	11.8	-3.1	88%	8%	4%	1%
Western Downs	10,000	n/p	151,000	n/p	15.2	n/p	70%	20%	10%	1%
Southern Downs	9,000	n/p	104,000	n/p	11.5	n/p	78%	22%	0%	0%
Total	1,970,000	-2%	39,011,000	-2%	19.8	0.0	72%	24%	8%	-

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 2009.
2. Trend change refers to the percentage change between the 3 years to June 2009 vs. the 3 years to June 2010.
3. Tourist accommodation figures refer to the Gladstone region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation June 2010.
4. Figures provided refer to hotels/motels/serviced apartments with five or more rooms.
5. Yield refers to average takings per room night available.
6. This figure includes "Other" visitors.
7. This figure includes "VFR", "Business" and "Other" visitors.
8. South East Queensland Country.

n/p not published.