Gladstone Regional Snapshot

Year ended March 2011

IMPORTANT MESSAGE:

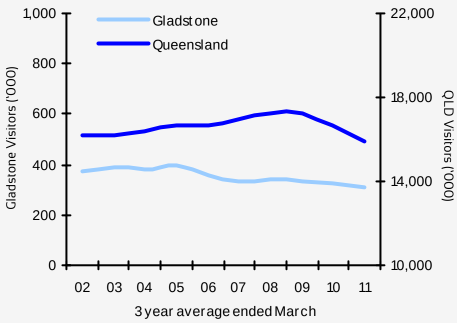
Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, domestic data for tourism regions will be presented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

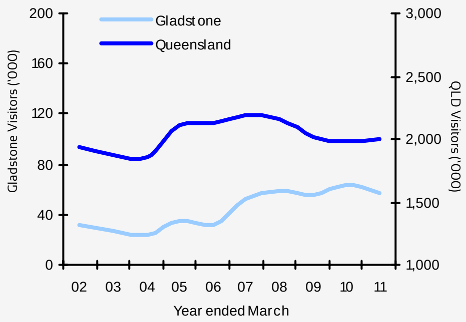
Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.

	Visitors	Holiday	VFR	Business
Domestic overnight 3 year average	312,000	144,000	93,000	61,000
Trend change[1]	▼ -4%	▼ -1%	▼ -6%	▼ -10%
International overnight	57,000	50,000	n/p	n/p
Annual change[2]	▼ -11%	▼ -9%	n/p	n/p
Trend change	▼ -1%	▼ -1%	n/p	n/p

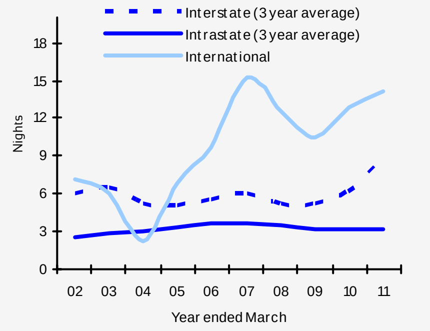
Domestic visitation



International visitation



Average length of stay (Gladstone)



- Over the three years to March 2011, the Gladstone region saw a downturn in domestic visitors, driven predominantly by the VFR (visiting friends and relatives) sector. On a trend basis domestic business visitation also declined, masking the recent rebound from this market.
- Following the state trend, regional Queenslanders drove the downturn in travel to the Gladstone region, deterred by inaccessibility due to flooding and enticed toward outbound travel.
- While domestic holiday travel was relatively stable (-1%), this result was supported by improved visitation from interstate markets.

- International visitation to the Gladstone region experienced a downturn in the year ended March 2011, arising from a continued softening in visitation from the United Kingdom (UK), USA and Germany.
- Most parts of Europe and the USA are plagued by weak economic conditions which has seen a reduction in their propensity to undertake long-haul travel to Australia.
- The youth market (under 30 years) accounts for approximately 56% of all international visitors to the Gladstone region. Close to half of this market chose long distance coach or bus to visit the region, followed by self drive transport options.

- In the three years to March 2011, domestic visitors average length of stay increased (up 0.6 nights) to 4.2 nights, driven by the interstate holiday market.
- Conversely, the time spent in region by intrastate visitors remained fairly stable averaging 3 nights as the trend towards short breaks continues.
- International visitors on holiday stayed an average 3 nights in the year ended March 2011, a decline from the previous year.
- Overall, international visitors' length of stay declined driven by the longer-staying employment and working holiday visitors reducing their nights spent in the region.

Tourist Accommodation[3]

	Hotels/Motels/Serviced apartments[4]
Guest arrivals	103,000
Annual change	12%
Room occupancy	56.3%
Percentage point change	8.3%
Average room rate	$128.39
Annual change	10%
Yield[5]	$72.29
Annual change	29%

- In the year ending March 2011, guest arrivals to Gladstone's commercial accommodation sector recovered strongly (up 12%).
- Room occupancy also increased by 8.3 percentage points on the previous year. The increase in demand boosted takings with increases in the average room rate (up 10%) and yield (up 29%).
- This reflects the recent recovery seen in Gladstone's domestic tourism market, which is not reflected in the trend visitor data presented above.

For more information on commercial accommodation for this 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 large and comprehensive surveys 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.

Stats on Q are you subscribed?

To receive an email alert whenever new tourism figures are released email 'subscribe' to:

statsonq@tq.com.au

Gladstone Regional Snapshot

Domestic visitation

Domestic visitors to Gladstone 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	144,000	-1%	729,000	20%	5.1	0.9
VFR	93,000	-6%	324,000	-6%	3.5	0.0
Business	61,000	-10%	236,000	9%	3.9	0.7
Total[6]	312,000	-4%	1,323,000	10%	4.2	0.6
Intrastate						
Holiday	111,000	-5%	380,000	-5%	3.4	0.0
VFR	83,000	-5%	267,000	-6%	3.2	0.0
Business	48,000	-8%	117,000	9%	2.4	0.4
Total	249,000	-5%	775,000	-3%	3.1	0.1
Interstate						
Total	63,000	-2%	547,000	37%	8.7	2.4

Domestic day trip visitors year ended March 2011

	Day trip visitors	Annual % Change	Expenditure ($) million	Annual % change
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 Gladstone 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Regional Qld	172,000	-9%	501,000	-10%
Brisbane	77,000	4%	274,000	11%

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%

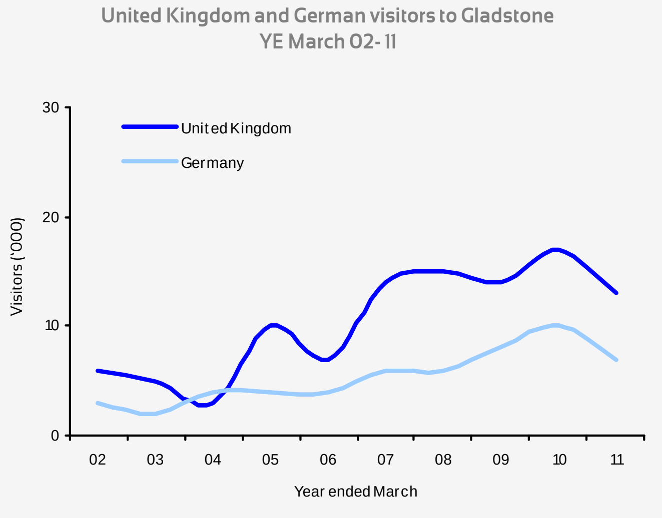
Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.

Gladstone Regional Snapshot

International visitation Year ended March 2011

International visitors to Gladstone

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	50,000	-9%	149,000	-26%	3	-0.6
Total[7]	57,000	-11%	243,000	-47%	4.3	-2.9



Key international source markets to Gladstone

Total visitors	Visitors	Annual % change	Nights	Annual % change
United Kingdom	13,000	-24%	39,000	-57%
Germany	7,000	-30%	31,000	-14%

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[8]	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[8]	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

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

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.

Gladstone Regional Snapshot

Regional Visitation

Domestic Regional Comparison

	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

	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. Tourist accommodation figures refer to the Gladstone region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation March 2011.
4. Figures provided refer to hotels/motels/serviced apartments with fifteen or more rooms.
5. Yield refers to average takings per room night available.
6. This figure includes "Other" visitors.
8. This figure includes "Business" and "Other" visitors
9. Excludes Transit visitors who did not have a stopover place.

n/p not published.