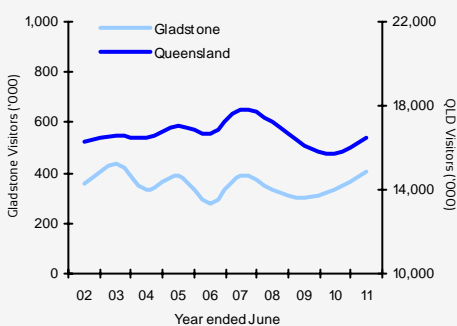


Year ended June 2011

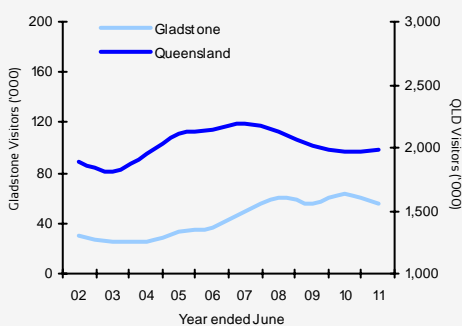


	Visitors	Holiday	VFR	Business
Domestic overnight	408,000	195,000	115,000	84,000
Annual change ¹	▲ 22%	n/p	▼ -14%	n/p
Trend change ²	▲ 8%	▲ 14%	▲ 7%	▼ -2%
International overnight	55,000	47,000	5,000	n/p
Annual change	▼ -14%	▼ -18%	▲ 25%	n/p
Trend change	▼ -3%	▼ -4%	▲ 9%	n/p
TOTAL	463,000	242,000	120,000	n/p
Annual change	▲ 16%	▲ 30%	▼ -12%	n/p

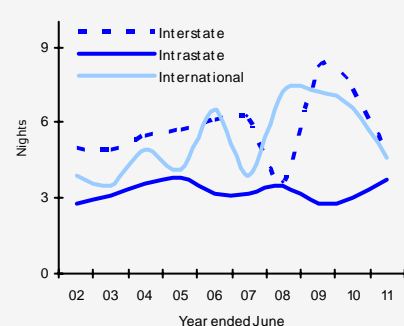
Domestic visitation



International visitation



Average length of stay (Gladstone)



■ Gladstone recorded increases in domestic visitation in the year ending June 2011, driven by solid growth in holiday and business visitation. In contrast, VFR (visiting friends and relatives) was weaker.

■ There was growth in intrastate travel, particularly those driving to the region and staying in caravans or camping. However, Gladstone had declines in interstate visitors. This changing visitor profile may be reflecting the trend towards people staying closer to home when travelling.

■ There was an increase in the number of visitors staying four or more nights in Gladstone, driven by intrastate holiday visitors.

■ Gladstone had declines in international visitation, the result of a soft holiday market. The holiday market represents 85% of international visitors to Gladstone.

■ The fall in the number of international visitors to Gladstone was the result of weak European and American markets. These countries have been struggling economically and as a result residents have reduced their propensity to travel.

■ While there were declines in visitors travelling alone (down 12,000 visitors), there was growth in family and friends travelling together (up 3,000 visitors). Youth visitors (down 9,000 visitors) account for most of the declines in unaccompanied travellers.

■ Gladstone's intrastate visitors' average length of stay increased, but interstate visitors stay declined. As a result, total domestic overnight average length of stay was relatively stable at 3.9 nights.

■ Domestic overnight holiday visitors average length of stay declined, driven by a sharp fall in interstate holiday visitors average stay.

■ International visitors' average length of stay declined to 4.6 nights in the year ended June 2011. Over 65% (or 36,000) of international visitors stay in Gladstone for 1-3 nights. This has declined 22% (or 10,000 visitors) since the year ending June 2010.

Tourist Accommodation³

	Hotels/Motels/Service apartments ⁴
Guest arrivals	88,000
Annual change	-4%
Room occupancy	62.6%
Percentage point change	13.7%
Average room rate	\$127
Annual change	9%
Yield ⁵	\$79
Annual change	39%

■ Whilst overall visitation to Gladstone increased by 16% in the year ending June 2011, the number of visitors staying in hotels, motels or serviced apartments declined by 4%.

■ The increase in visitation indicates that there was an increase in the number of visitors staying in non-commercial accommodation.

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

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statsonq@tq.com.au

Domestic visitation Year ended June 2011

Domestic visitors to Gladstone

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	195,000	n/p	886,000	42%	4.5	-0.3
VFR	115,000	-14%	391,000	-12%	3.4	0.1
Business	84,000	n/p	240,000	10%	2.9	-1.3
Total⁶	408,000	22%	1,576,000	19%	3.9	-0.1
Intrastate						
Holiday	170,000	n/p	755,000	n/p	4.4	1.5
VFR	103,000	-16%	332,000	-12%	3.2	0.1
Business	68,000	n/p	178,000	47%	2.6	-0.4
Total	352,000	38%	1,308,000	n/p	3.7	0.7
Interstate						
Total	56,000	n/p	268,000	n/p	4.8	-2.5

Domestic day trip visitors

	Day trip visitors	Annual % Change	Expenditure (\$ million)	Annual % change
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 Gladstone

Total visitors	Visitors	Annual % change	Nights	Annual % change
Regional Qld	238,000	n/p	822,000	n/p
Brisbane	115,000	n/p	487,000	n/p

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				
	Visitors	Annual % change	Nights	Annual % change
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.



International visitation Year ended June 2011

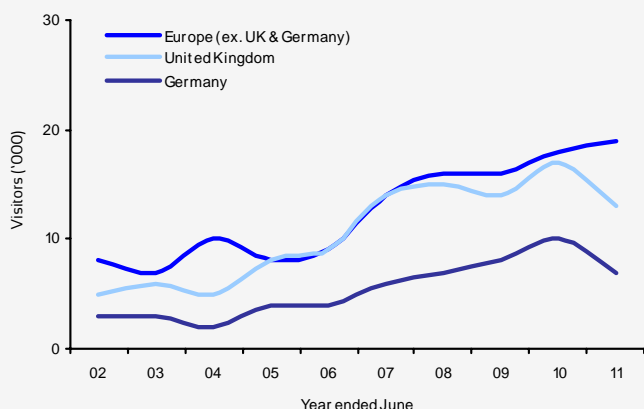
International visitors to Gladstone

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	47,000	-18%	142,000	-28%	3.0	-0.5
Total⁷	55,000	-14%	251,000	n/p	4.6	-2.0

Key international source markets to Gladstone

Total visitors	Visitors	Annual % change	Nights	Annual % change
Europe (ex. UK & Germany)	19,000	6%	64,000	16%
United Kingdom	13,000	-24%	43,000	-35%
Germany	7,000	-30%	29,000	16%

United Kingdom and German visitors to Gladstone
YE June 02 - 11



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%

Recovery in international visitation to Australia was led by a strong rebound in business long-haul travel, and boosted by an increase in air capacity on key source markets routes, particularly out of Asia.



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.

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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. Tourist accommodation figures refer to the Gladstone region as defined by the Australian Bureau of Statistics, Survey of Tourist Accommodation December 2010.
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.

7. This figure includes "VFR", "Business" and "Other" visitors.
n/p not published.