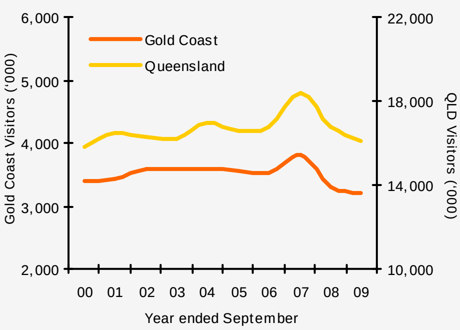
Gold Coast Regional Snapshot

Year ended September 2009

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	**3,204,000**	**1,980,000**	**833,000**	**308,000**	**$2,911**
Annual change[1]	▼ -3%	▼ -6%	▲ 3%	▼ -15%	▼ -1%
Trend change[2]	▼ -3%	▼ -3%	0%	▼ -8%	▲ 1%
International overnight	**794,000**	**626,000**	**126,000**	**33,000**	**$1,042**
Annual change	▼ -3%	▼ -3%	▲ 3%	▼ -13%	▲ 10%
Trend change	▼ -2%	▼ -2%	▲ 5%	▼ -10%	▲ 6%

Domestic visitation



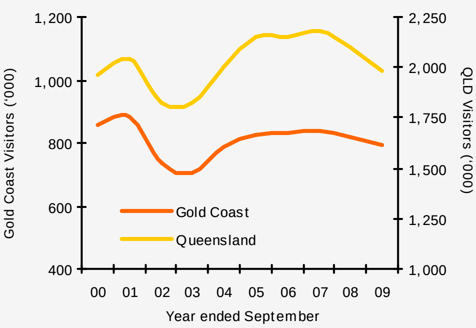
▪ The Gold Coast saw a decline in domestic visitation over the last year, similar to that experienced by the state.

▪ The decline in domestic holiday visitors was heavily influenced by fewer Brisbane residents staying overnight on the Gold Coast. Some of the Brisbane market clearly substituted an overnight trip for a day trip, with there being a 7% increase in the number of Brisbane residents taking a day trip on the Gold Coast over the last year.

▪ From an interstate perspective, the Gold Coast performed better than Queensland as a whole, seeing much smaller declines from the Sydney market and stronger growth from Melbourne. The regions dominant interstate holiday market accounts for more than 50% of domestic visitor nights.

▪ While domestic business visitors declined, this was driven by the interstate market, which is still to recover post the Global Financial Crisis. In contrast, intrastate business to the Gold Coast grew strongly over the last year.

International visitation



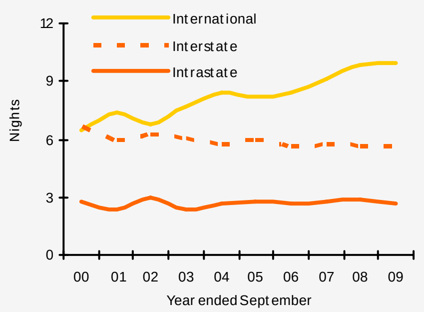
▪ The decline in international visitors to the Gold Coast was driven by declines in holiday visitors from Korea, New Zealand, and China.

▪ While the Gold Coast saw fewer Japanese visitors for the year to September 2009, the region saw an increase in Japanese holiday visitors (up 1%). This was despite a high level of concern surrounding Swine Flu in Japan. The decline in visitors from Korea would have also been influenced by Swine Flu fears.

▪ In a similar trend to that seen by the state, the international VFR market to the Gold Coast saw an increase over the year. Residents of the United Kingdom, the United States of America (USA), and New Zealand boosted the regions' VFR result.

▪ The Gold Coast also welcomed additional holiday visitors from the USA and Taiwan in the year ending September 2009.

Average length of stay (Gold Coast)



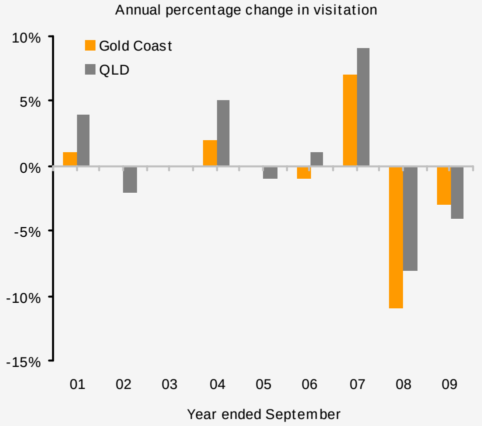
▪ The length of stay by international visitors has been steadily climbing over several years. Education and employment are the main drivers behind this growth.

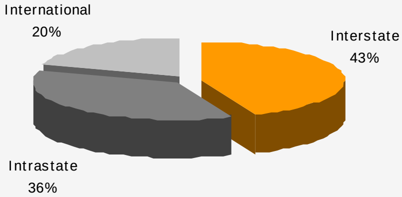
▪ The interstate market's average length of stay declined over the past decade, while the intrastate market has seen slight increases.

▪ In the year ending September 2009 intrastate holiday visitors reduced their length of stay (down 0.4 nights) to 2.9 nights, with the move towards short breaks evident.

▪ Interstate holiday visitors in contrast, continued to stay on average 6.4 nights in the region.

Total visitation





▪ In the year ending September 2009 there were a total of **3,998,000** overnight visitors to the Gold Coast. This was a 3% decline compared with the year ending September 2008 level.

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.

Gold Coast Regional Snapshot

Domestic visitation Year ended September 2009

Domestic visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,980,000	-6%	9,599,000	-9%	4.8	-0.2
VFR	833,000	3%	2,928,000	3%	3.5	0.0
Business	308,000	-15%	842,000	-14%	2.7	0.0
Total	3,204,000	-3%	13,725,000	-6%	4.3	-0.1
Intrastate						
Holiday	885,000	-9%	2,605,000	-18%	2.9	-0.4
VFR	397,000	3%	915,000	0%	2.3	-0.1
Business	126,000	14%	309,000	20%	2.4	0.1
Total	1,451,000	-1%	3,968,000	-9%	2.7	-0.2
Interstate						
Holiday	1,094,000	-4%	6,993,000	-6%	6.4	-0.1
VFR	437,000	3%	2,013,000	4%	4.6	0.0
Business	182,000	-27%	533,000	-26%	2.9	0.0
Total	1,754,000	-5%	9,757,000	-6%	5.6	0.0

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Gold Coast	5,901,000	10%	$648	21%
Queensland	31,239,000	10%	$3,136	0%
Australia	142,714,000	5%	$14,450	1%

Key domestic source markets to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change
Brisbane	864,000	-6%	1,929,000	-23%
Sydney	589,000	-4%	2,818,000	-4%
Regional Qld	587,000	7%	2,039,000	12%
Regional NSW	384,000	-14%	1,755,000	-23%
Melbourne	377,000	-2%	2,350,000	1%
Regional Vic	145,000	12%	862,000	-10%
South Australia	109,000	-2%	960,000	19%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,098,000	-4%	69,937,000	-4%
NSW	22,221,000	-9%	76,541,000	-7%
Victoria	15,911,000	-7%	49,415,000	-6%
Rest of Aus	14,468,000	-8%	60,780,000	-12%
Australia	66,446,000	-7%	256,673,000	-7%
Holiday visitors				
Queensland	7,385,000	-3%	35,946,000	-5%
NSW	10,076,000	-4%	39,354,000	-1%
Victoria	7,484,000	-8%	24,976,000	-6%
Rest of Aus	6,270,000	-8%	28,602,000	-13%
Australia	30,096,000	-6%	128,878,000	-6%

Queensland recorded a more marginal decline in total visitors, and holiday visitors than the nation. Queensland's improved holiday and VFR results were a key contributor.

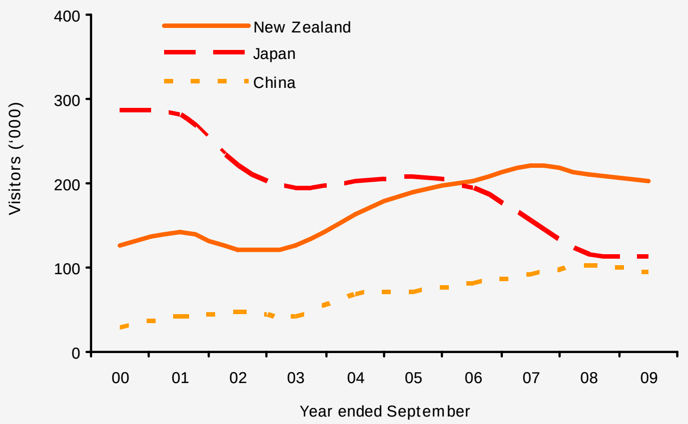
Gold Coast Regional Snapshot

International visitation Year ended September 2009

International visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	626,000	-3%	3,890,000	-8%	6.2	-0.3
VFR	126,000	3%	1,454,000	8%	11.6	0.5
Business	33,000	-13%	155,000	-33%	4.7	-1.3
Total	794,000	-3%	7,860,000	-2%	9.9	0.1

New Zealand, Japan and Chinese visitors to the Gold Coast YE September 00 - 09



Key international source markets and purpose of visit

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	202,000	-4%	2,097,000	1%
Japan	113,000	-3%	977,000	-15%
China	96,000	-7%	395,000	-8%
United Kingdom	72,000	7%	813,000	55%
United States	34,000	36%	440,000	86%
Holiday visitors				
New Zealand	135,000	-4%	1,161,000	-14%
Japan	98,000	1%	635,000	-1%
China	89,000	-4%	208,000	-10%
United Kingdom	56,000	4%	446,000	38%
Korea	29,000	-19%	204,000	-40%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,982,000	-6%	40,032,000	1%
NSW	2,659,000	-6%	59,502,000	4%
Victoria	1,502,000	1%	37,693,000	14%
Rest of Aus	1,343,000	0%	37,534,000	10%
Australia	5,051,000	-2%	174,761,000	7%
Holiday visitors				
Queensland	1,432,000	-7%	19,795,000	6%
NSW	1,519,000	-5%	19,523,000	10%
Victoria	752,000	-3%	7,967,000	3%
Rest of Aus	751,000	-3%	11,974,000	5%
Australia	2,773,000	-5%	59,259,000	7%

Queensland saw an increase in the often more affordable form of travel, VFR. However, due to its' greater reliance on the holiday market, a 3% decline in the market saw the state see a larger drop in visitation overall than the nation.

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 Gold Coast tourism region aligns with the ABS region.

Gold Coast Regional Snapshot

Year ended September 2009

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,668,000	5%	14,574,000	4%	3.1	-0.1	28%	38%	26%	29%
Gold Coast	**3,204,000**	**-3%**	**13,725,000**	**-6%**	**4.3**	**-0.1**	**62%**	**26%**	**10%**	**20%**
Sunshine Coast	2,573,000	-10%	10,777,000	-6%	4.2	0.2	64%	29%	5%	16%
SEQC[3]	2,360,000	-2%	6,531,000	-5%	2.8	0.0	39%	44%	12%	15%
Tropical North Qld	1,578,000	6%	7,755,000	0%	4.9	-0.3	54%	26%	16%	10%
Central Queensland	1,087,000	5%	3,991,000	19%	3.7	0.5	41%	26%	25%	7%
Toowoomba	984,000	-18%	2,909,000	-8%	3.0	0.4	32%	37%	25%	6%
Fraser Coast	858,000	14%	3,420,000	14%	4.0	0.0	49%	36%	12%	5%
Townsville	807,000	-9%	3,425,000	17%	4.2	0.9	39%	25%	29%	5%
Capricorn	576,000	-27%	2,295,000	-6%	4.0	0.9	38%	29%	24%	4%
Mackay	556,000	-9%	2,102,000	-31%	3.8	-1.2	29%	32%	31%	3%
Bundaberg	511,000	-17%	1,904,000	-5%	3.7	0.4	35%	46%	13%	3%
Whitsundays	416,000	-16%	1,852,000	-15%	4.5	0.1	69%	18%	7%	3%
Outback	378,000	-17%	1,946,000	-14%	5.2	0.2	41%	12%	38%	2%
Gladstone	321,000	16%	1,331,000	48%	4.1	0.9	56%	22%	16%	2%
Western Downs	294,000	n/p	943,000	n/p	3.2	0.7	36%	25%	34%	2%
Southern Downs	194,000	n/p	470,000	n/p	2.4	-0.2	57%	30%	8%	1%
Total	16,098,000	-4%	69,937,000	-4%	4.3	-0.1	46%	32%	19%	-

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	1%	16,137,000	2%	17.7	0.2	56%	28%	11%	46%
Gold Coast	**794,000**	**-3%**	**7,860,000**	**-2%**	**9.9**	**0.1**	**79%**	**16%**	**4%**	**40%**
Tropical North Qld	667,000	-17%	6,504,000	-1%	9.8	1.7	91%	5%	3%	34%
Sunshine Coast	283,000	4%	2,587,000	16%	9.1	0.9	80%	18%	2%	14%
Whitsundays	223,000	0%	1,288,000	0%	5.8	0.0	97%	2%	0%	11%
Fraser Coast	189,000	-7%	765,000	-11%	4.1	-0.1	96%	4%	0%	10%
Townsville	147,000	-1%	1,335,000	6%	9.1	0.6	80%	14%	3%	7%
Central Queensland	129,000	7%	1,140,000	8%	8.9	0.2	86%	9%	4%	7%
SEQC[3]	119,000	9%	2,278,000	27%	19.2	2.7	40%	50%	5%	6%
Capricorn	78,000	3%	575,000	-4%	7.4	-0.5	86%	8%	4%	4%
Gladstone	61,000	3%	390,000	-14%	6.4	-1.2	87%	7%	3%	3%
Mackay	54,000	2%	453,000	79%	8.4	3.6	78%	17%	7%	3%
Bundaberg	51,000	38%	624,000	18%	12.3	-1.9	76%	18%	2%	3%
Toowoomba	37,000	6%	674,000	18%	18.0	1.5	51%	32%	11%	2%
Outback	27,000	-21%	340,000	-9%	12.8	2.0	89%	4%	4%	1%
Western Downs	15,000	n/p	198,000	n/p	13.2	3.7	73%	13%	7%	1%
Southern Downs	7,000	n/p	185,000	n/p	26.8	10.2	71%	14%	0%	0%
Total	1,982,000	-6%	40,032,000	1%	20.2	1.4	72%	25%	8%	-

Data sources: National & International Visitor Surveys, Tourism Research Australia. Visitor expenditure data is courtesy of Tourism Research Australia.

1. Annual change refers to the percentage change between the year ended September 2009 vs. year ended September 2008
2. Trend change refers to the percentage change between the 3 years to September 2008 vs. the 3 years to September 2009
3. South East Queensland Country

n/p – this information is not published due to low sample size