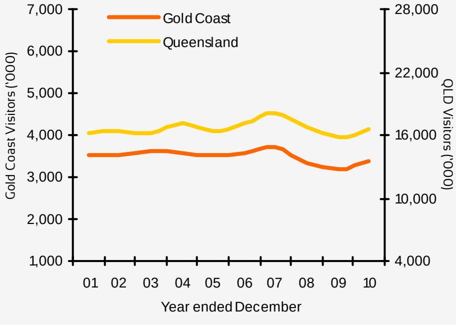
Gold Coast Regional Snapshot

Tourism Queensland

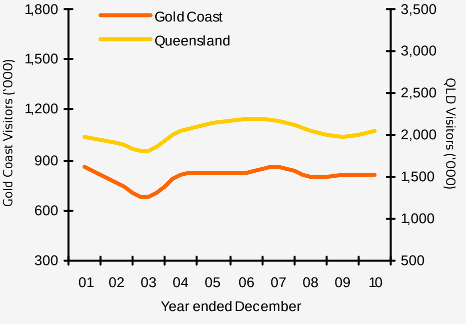
Year ended December 2010

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	3,396,000	2,008,000	971,000	306,000	$2,862
Annual change[1]	▲ 6%	▲ 1%	▲ 13%	▲ 15%	0%
Trend change[2]	▼ -3%	▼ -3%	▼ -3%	▼ -8%	▼ -2%
International overnight	817,000	638,000	124,000	39,000	$955
Annual change	0%	▼ -2%	▲ 1%	▲ 26%	▼ -6%
Trend change	▼ -2%	▼ -3%	▲ 5%	▼ -6%	▲ 1%
TOTAL	4,213,000	2,646,000	1,095,000	345,000	$3,817
Annual change	▲ 5%	0%	▲ 11%	▲ 16%	▼ -1%

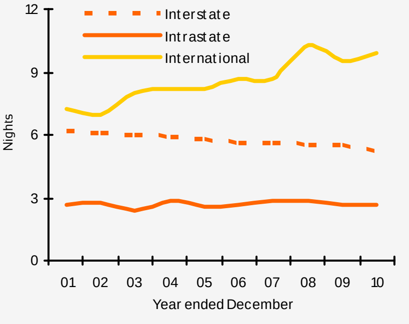
Domestic visitation



International visitation



Average length of stay (Gold Coast)



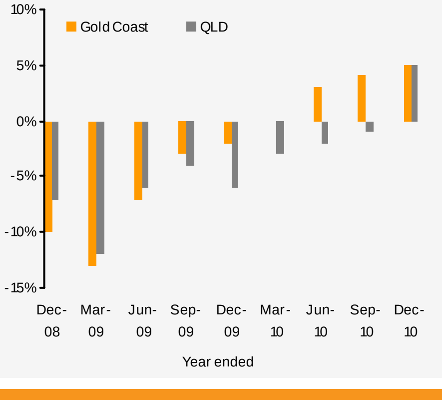
- Key to the Gold Coast's success in 2010 has been the VFR (visiting friends or relatives) and business markets. However, holiday visitation remained the dominant source of domestic visitors for the region, with visitation increasing marginally over the year.
- Increased visitation from regional NSW (an important market for Gold Coast) and regional Victoria, was countered by weaker interstate travel by Sydney residents. The recent growth from Melbourne has abated for both Queensland and the Gold Coast.
- Brisbane residents decreased their holiday travel within Queensland overall and also to the Gold Coast, with Brisbane residents increasingly opting for interstate destinations.

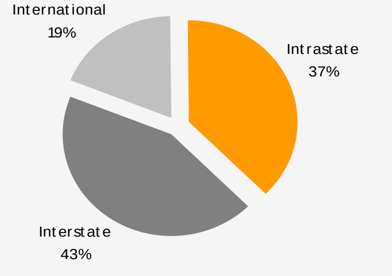
- As with domestic results, the Gold Coast also performed best in the international VFR and business.
- Holiday results for the Gold Coast eased in 2010, driven by a decline from New Zealand, specifically couples travelling for a holiday.
- Although the Gold Coast saw a decline in Japanese visitors it did see growth from Asia, particularly from China, Korea, Malaysia and Singapore. Rising consumer confidence in these markets and improving air access driving the upswing.
- Travel from the United Kingdom (UK) and Europe more broadly declined in line with softer economic conditions in these source markets. Consumer confidence in the UK remains weak, with concerns around job security and personal finances remaining.

- Interstate visitor average length of stay again declined (albeit slightly) for the Gold Coast, and this was evident across holiday, VFR and business markets. VFR and business travel has become much more focussed on travel of 3 nights or less over the last decade.
- The length of stay for intrastate visitors remained virtually unchanged, with the Gold Coast still a popular short break (1-3 nights) destination.
- In contrast to domestic visitors, the average stay for international visitors continued to increase. International holiday visitors stayed on average 8-9 nights.
- The Gold Coast now attracts an increased number of international visitors coming to the region for employment or education purposes.

Total visitation

Annual percentage change in visitation





- There were **4,213,000** international and domestic overnight visitors to the Gold Coast in the year ended December 2010, this was an increase of 5% on the year ended December 2009.

IMPACT OF WEATHER EVENTS IN QUEENSLAND:

Significant flooding and cyclone events occurred in Queensland in late December 2010 and continued into 2011. The full impact of these events will not be seen in tourism data until year ended March 2011 data (published in June 2011). Many of Queensland's tourism regions were affected either directly or indirectly by these weather events.

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statsonq@tq.com.au

Gold Coast Regional Snapshot

Tourism Queensland

Domestic visitation Year ended December 2010

Domestic visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	2,008,000	1%	9,596,000	2%	4.8	0.1
VFR	971,000	13%	3,001,000	2%	3.1	-0.3
Business	306,000	15%	871,000	0%	2.8	-0.5
Total[3]	3,396,000	6%	13,755,000	1%	4.1	-0.1
Intrastate						
Holiday	932,000	-1%	3,038,000	14%	3.3	0.5
VFR	480,000	18%	986,000	4%	2.1	-0.2
Business	87,000	-8%	170,000	-38%	2.0	-0.9
Total	1,575,000	6%	4,326,000	7%	2.7	0.0
Interstate						
Holiday	1,077,000	3%	6,559,000	-2%	6.1	-0.3
VFR	491,000	8%	2,014,000	1%	4.1	-0.3
Business	220,000	28%	701,000	17%	3.2	-0.3
Total	1,821,000	6%	9,429,000	-1%	5.2	-0.3

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Gold Coast	6,778,000	14%	$692	6%
Queensland	34,705,000	10%	$3,717	16%
Australia	151,288,000	5%	$14,969	2%

Nationally, and in QLD the popularity of day trips continued to build momentum, with the comparative affordability of this form of travel a key factor.

Key domestic source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	943,000	2%	2,360,000	14%
Regional Qld	632,000	11%	1,966,000	-1%
Sydney	586,000	1%	2,798,000	3%
Regional NSW	468,000	20%	1,954,000	12%
Melbourne	395,000	-1%	2,303,000	-10%
Other	371,000	7%	2,374,000	-5%

State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,582,000	5%	71,208,000	2%
NSW	23,066,000	2%	78,330,000	2%
Victoria	15,812,000	0%	49,406,000	0%
Rest of Aus	14,156,000	-1%	60,597,000	0%
Australia	67,402,000	2%	259,541,000	1%
Holiday visitors				
Queensland	7,046,000	-4%	35,189,000	-4%
NSW	10,300,000	2%	38,454,000	-2%
Victoria	7,426,000	1%	24,860,000	1%
Rest of Aus	6,340,000	2%	28,824,000	0%
Australia	30,022,000	0%	127,328,000	-1%

The appeal of outbound travel has not waned in 2010, with this further adding to the woes of domestic tourism in Australia. Clearly, consumers are seeing value for money in outbound travel, driven by low airfares and the appreciation of the $AUD against many currencies.

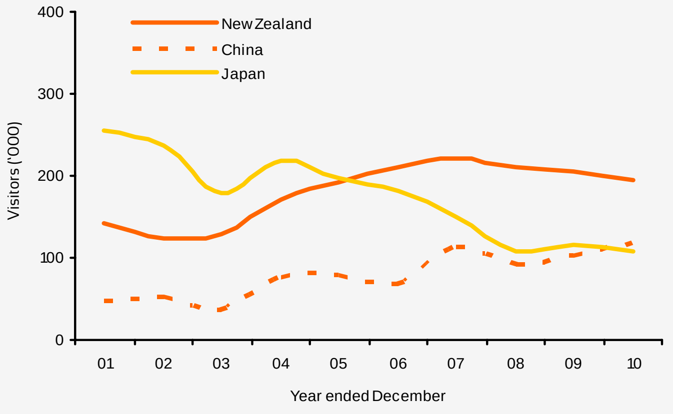
Gold Coast Regional Snapshot

International visitation Year ended December 2010

International visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	638,000	-2%	3,799,000	-3%	6.0	-0.1
VFR	124,000	1%	1,462,000	-1%	11.8	-0.2
Business	39,000	26%	210,000	30%	5.3	0.2
Total[3]	817,000	0%	8,076,000	5%	9.9	0.4

New Zealand, Chinese and Japanese visitors to the Gold Coast
YE December 01 - 10



Key international source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	195,000	-4%	1,837,000	-13%
China	119,000	17%	648,000	52%
Japan	109,000	-6%	805,000	-11%
United Kingdom	68,000	-13%	626,000	-15%
Korea	39,000	22%	484,000	5%
Holiday visitors				
New Zealand	126,000	-9%	1,105,000	-6%
China	105,000	9%	241,000	15%
Japan	93,000	-7%	575,000	-8%
United Kingdom	52,000	-15%	314,000	-30%
Korea	35,000	25%	274,000	31%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,048,000	4%	39,800,000	2%
NSW	2,839,000	5%	65,225,000	6%
Victoria	1,649,000	8%	40,662,000	6%
Rest of Aus	1,366,000	1%	41,024,000	8%
Australia	5,390,000	5%	186,711,000	6%
Holiday visitors				
Queensland	1,440,000	2%	18,396,000	-6%
NSW	1,610,000	4%	21,098,000	5%
Victoria	793,000	3%	8,046,000	-1%
Rest of Aus	735,000	-3%	11,708,000	-2%
Australia	2,911,000	4%	59,247,000	-1%

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

The Gold Coast tourism region aligns with the ABS region.

Gold Coast Regional Snapshot

Year ended December 2010

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,860,000	16%	15,233,000	16%	3.1	0.0	29%	35%	29%	29%
Gold Coast	**3,396,000**	**6%**	**13,755,000**	**1%**	**4.1**	**-0.1**	**59%**	**29%**	**9%**	**20%**
SEQC[4]	3,018,000	8%	9,379,000	7%	3.1	0.0	43%	40%	10%	18%
Sunshine Coast	2,604,000	-3%	10,186,000	-12%	3.9	-0.4	59%	31%	6%	16%
TNQ	1,282,000	-16%	7,418,000	-6%	5.8	0.6	55%	23%	19%	8%
Toowoomba	1,238,000	1%	3,548,000	-12%	2.9	-0.4	33%	40%	20%	7%
CQ	1,124,000	-1%	3,863,000	-13%	3.4	-0.5	34%	28%	32%	7%
Capricorn	842,000	0%	3,028,000	-11%	3.6	-0.4	32%	26%	35%	5%
Townsville	837,000	11%	3,066,000	2%	3.7	-0.3	28%	28%	31%	5%
Mackay	685,000	25%	2,741,000	38%	4.0	0.4	22%	28%	45%	4%
Bundaberg	591,000	15%	2,027,000	-5%	3.4	-0.7	30%	28%	28%	4%
Fraser Coast	514,000	-10%	2,104,000	-16%	4.1	-0.2	53%	31%	11%	3%
Whitsundays	501,000	24%	2,172,000	27%	4.3	0.1	70%	17%	11%	3%
Outback	370,000	n/p	1,849,000	n/p	5.0	n/p	34%	19%	42%	2%
Gladstone	343,000	7%	1,584,000	8%	4.6	0.1	46%	31%	20%	2%
Southern Downs	334,000	n/p	779,000	n/p	2.3	n/p	53%	35%	10%	2%
Western Downs	296,000	n/p	737,000	n/p	2.5	n/p	50%	23%	21%	2%
Total	16,582,000	5%	71,208,000	2%	4.3	-0.1	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	948,000	4%	16,422,000	6%	17.3	0.3	51%	30%	12%	46%
Gold Coast	**817,000**	**0%**	**8,076,000**	**5%**	**9.9**	**0.4**	**78%**	**15%**	**5%**	**40%**
TNQ	686,000	5%	6,109,000	-2%	8.9	-0.7	91%	5%	3%	33%
Sunshine Coast	283,000	2%	2,618,000	3%	9.2	0.0	80%	18%	2%	14%
Whitsundays	204,000	-9%	1,167,000	-11%	5.7	-0.2	97%	2%	1%	10%
Fraser Coast	169,000	-10%	671,000	-6%	4.0	0.2	96%	4%	1%	8%
Townsville	131,000	-8%	1,486,000	11%	11.3	1.9	79%	11%	5%	6%
CQ	125,000	-2%	875,000	-33%	7.0	-3.2	86%	10%	5%	6%
SEQC[4]	118,000	1%	2,120,000	2%	18.0	0.2	42%	47%	7%	6%
Capricorn	78,000	-5%	573,000	-29%	7.3	-2.5	83%	10%	4%	4%
Gladstone	63,000	3%	302,000	-40%	4.8	-3.4	90%	6%	3%	3%
Mackay	49,000	-9%	379,000	-23%	7.7	-1.4	78%	18%	4%	2%
Bundaberg	42,000	-16%	690,000	0%	16.5	2.6	79%	17%	0%	2%
Toowoomba	36,000	-10%	710,000	13%	19.8	3.9	47%	31%	11%	2%
Outback	24,000	n/p	249,000	n/p	10.6	n/p	75%	13%	8%	1%
Western Downs	12,000	n/p	157,000	n/p	13.5	n/p	58%	8%	8%	1%
Southern Downs	10,000	n/p	178,000	n/p	17.1	n/p	80%	20%	0%	0%
Total	2,048,000	4%	39,800,000	2%	19.4	-0.5	70%	24%	9%	-

Data sources: National & International Visitor Surveys, Tourism Research Australia.

1. Annual change refers to the percentage change between the year ended December 2010 vs. year ended December 2009.
2. Trend change refers to the percentage change between the 3 years to December 2009 vs. the 3 years to December 2010.
3. This figure includes "Other" visitors.
4. South East Queensland Country.

n/p not published.

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.