Gold Coast Regional Snapshot

Year ended March 2010

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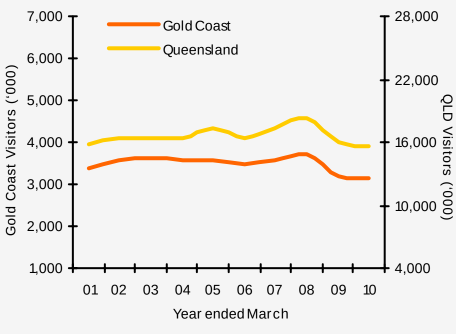
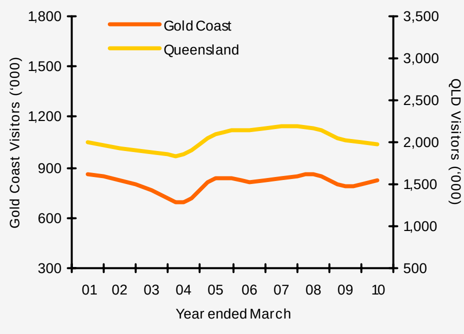
	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight	3,148,000	1,959,000	852,000	248,000	$2,879
Annual change[1]	▼ -2%	▼ -2%	▲ 6%	▼ -29%	▲ 3%
Trend change[2]	▼ -4%	▼ -4%	0%	▼ -12%	0%
International overnight	829,000	660,000	123,000	33,000	$1,019
Annual change	▲ 5%	▲ 6%	▼ -6%	▲ 6%	▲ 1%
Trend change	0%	0%	0%	▼ -5%	▲ 5%
TOTAL	3,977,000	2,619,000	975,000	281,000	$3,898
Annual change	0%	0%	▲ 4%	▼ -26%	▲ 2%

Domestic visitation



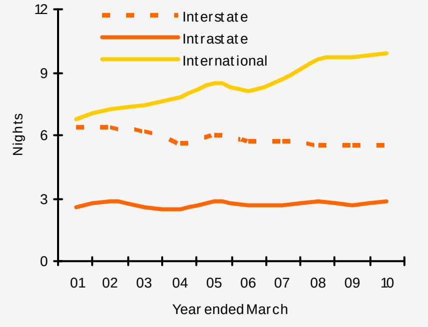
- Declines in domestic travel seen since the onset of the GFC are now starting to level out for both Queensland and the Gold Coast.
- Although interstate travel remains weaker overall, the Gold Coast has seen a rebound from intrastate. The Gold Coast's Brisbane holiday market has stabilised while there has been growth in holiday travel to the region from regional parts of Queensland and New South Wales.
- Declines in interstate travel to Queensland continue to be influenced by a downturn in the Sydney market. However, the Gold Coast has seen a smaller decline in Sydney holidaymakers than the state.
- As with Queensland overall, the Gold Coast's domestic performance benefitted from a buoyant Melbourne market.

International visitation



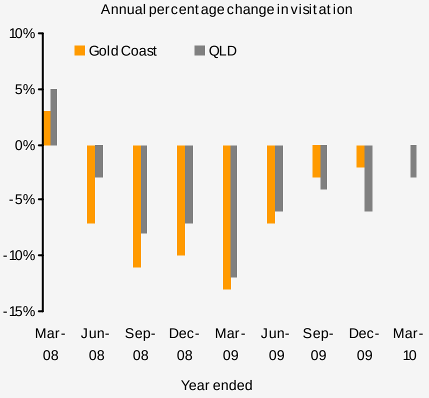
- The Gold Coast has enjoyed a rebound in international visitation, driven by the stabilisation in the Japanese market and strong growth from China.
- The Gold Coast saw an increase in New Zealand (NZ) holiday visitors and was one of a only a few regions in Queensland to do so. Ongoing competition on the Trans-Tasman route and competitive packaging continues to stimulate travel to the Gold Coast.
- Contributing to the Gold Coast's result from international markets was the United Kingdom (UK) and Europe. An increasing proportion of the youth market from Europe and the UK now visit the Gold Coast.
- Apart from the youth market the Gold Coast is also seeing growth from older visitors (over 55) from NZ, China, the USA and the UK.

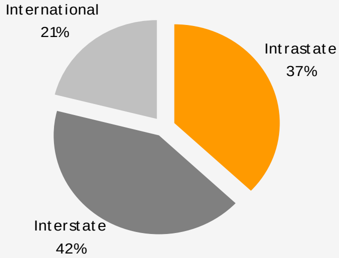
Average length of stay (Gold Coast)



- The average length of stay for international visitors to the Gold Coast has continued to grow, fuelled by an expanding education and working holiday market.
- Northern Asian visitors from China, Korea and Taiwan boosted education nights for the Gold Coast.
- In contrast, the average length of stay for domestic visitors has remained stable in recent years, though the spend per night of these visitors increased by 8% in the year to March 2010.
- The Gold Coast continues to be a short break holiday destination for Queenslanders, but a longer stay destination for interstate visitors.
- Interstate holiday visitors continue to stay over 6 nights on average on the Gold Coast.

Total visitation





- There were **3,977,000** total overnight visitors to the Gold Coast in the year ended March 2010, this remained steady on the year ended March 2009.

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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Domestic visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,959,000	-2%	9,257,000	-2%	4.7	0.0
VFR	852,000	6%	3,003,000	4%	3.5	-0.1
Business	248,000	-29%	900,000	-6%	3.6	0.9
Total[3]	3,148,000	-2%	13,512,000	-1%	4.3	0.0
Intrastate						
Holiday	934,000	3%	2,906,000	14%	3.1	0.3
VFR	417,000	10%	1,007,000	-3%	2.4	-0.3
Business	70,000	n/p	222,000	-17%	3.2	1.1
Total	1,467,000	3%	4,294,000	11%	2.9	0.2
Interstate						
Holiday	1,025,000	-7%	6,350,000	-8%	6.2	-0.1
VFR	435,000	2%	1,996,000	8%	4.6	0.3
Business	179,000	-18%	678,000	-1%	3.8	0.7
Total	1,681,000	-5%	9,217,000	-5%	5.5	0.0

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Gold Coast	5,576,000	-2%	$597	-1%
Queensland	32,040,000	8%	$3,380	9%
Australia	147,501,000	9%	$15,095	7%

The growing trend towards day trips continues to gain momentum, with the comparative affordability of this form of travel a key influence.

Key domestic source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	920,000	8%	2,336,000	19%
Sydney	567,000	-1%	2,646,000	-5%
Regional Qld	547,000	-4%	1,959,000	3%
Regional NSW	394,000	2%	1,848,000	-1%
Melbourne	385,000	-2%	2,360,000	9%
South Australia	116,000	-2%	965,000	5%
Regional Vic	91,000	-35%	534,000	-42%

State comparison - Domestic

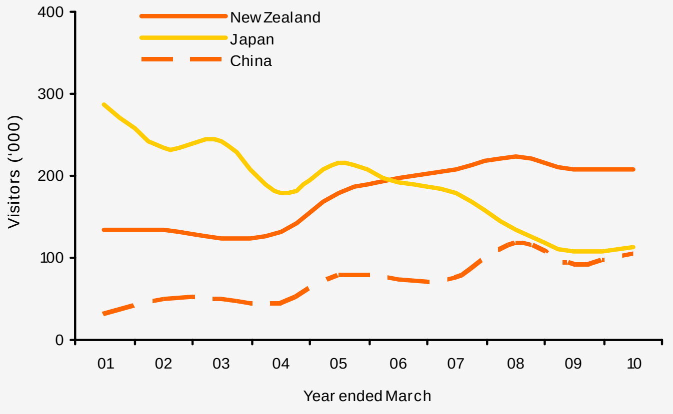
Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,531,000	-3%	69,857,000	2%
NSW	22,692,000	-2%	76,685,000	-3%
Victoria	15,856,000	-1%	50,044,000	2%
Rest of Aus	14,123,000	-5%	60,010,000	-6%
Australia	65,997,000	-3%	256,596,000	-1%
Holiday visitors				
Queensland	6,974,000	-4%	34,955,000	1%
NSW	10,262,000	0%	38,183,000	-3%
Victoria	7,478,000	1%	25,338,000	5%
Rest of Aus	6,297,000	0%	29,074,000	0%
Australia	29,912,000	-1%	127,550,000	0%

Holiday travel declined nationally, although an increase in interstate holiday visitors was recorded in Australia for the first time since 2007. QLD's holiday decline was offset by an increase in holiday nights and holiday expenditure over the year.

International visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	660,000	6%	4,019,000	-1%	6.1	-0.4
VFR	123,000	-6%	1,546,000	9%	12.6	1.8
Business	33,000	6%	173,000	4%	5.2	-0.2
Total[3]	829,000	5%	8,184,000	7%	9.9	0.2

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



Key international source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	207,000	0%	2,099,000	0%
Japan	114,000	5%	817,000	-22%
China	106,000	15%	597,000	n/p
United Kingdom	82,000	22%	723,000	6%
Korea	36,000	-3%	519,000	53%
Holiday visitors				
New Zealand	142,000	2%	1,248,000	-5%
Japan	99,000	6%	577,000	-10%
China	98,000	14%	222,000	6%
United Kingdom	64,000	25%	456,000	25%
Korea	31,000	-9%	250,000	45%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,986,000	-2%	40,038,000	3%
NSW	2,754,000	1%	62,057,000	3%
Victoria	1,539,000	4%	39,677,000	11%
Rest of Aus	1,356,000	2%	39,021,000	6%
Australia	5,211,000	3%	180,793,000	5%
Holiday visitors				
Queensland	1,426,000	-3%	19,416,000	2%
NSW	1,569,000	2%	20,961,000	12%
Victoria	754,000	0%	8,069,000	1%
Rest of Aus	747,000	0%	12,314,000	6%
Australia	2,824,000	1%	60,759,000	6%

Queensland's more modest recovery in international visitation than the nation was driven by a subdued VFR result, and the ongoing declines from Japan. Positively however, an increase in international visitation in the March quarter 2010 (compared with the March quarter 2009) was recorded.

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 March 2010

www.tq.com.au/research

Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,128,000	-11%	13,301,000	-9%	3.2	0.0	27%	42%	25%	27%
Gold Coast	**3,148,000**	**-2%**	**13,512,000**	**-1%**	**4.3**	**0.0**	**62%**	**27%**	**8%**	**20%**
Sunshine Coast	2,468,000	-8%	11,039,000	5%	4.5	0.6	63%	30%	5%	16%
SEQC[4]	2,309,000	0%	6,379,000	-7%	2.8	-0.2	39%	42%	15%	15%
TNQ	1,499,000	4%	8,030,000	17%	5.4	0.6	54%	24%	19%	10%
CQ	1,172,000	24%	4,490,000	33%	3.8	0.2	35%	30%	27%	8%
Toowoomba	1,039,000	8%	3,389,000	30%	3.3	0.6	30%	40%	24%	7%
Townsville	766,000	-9%	3,079,000	0%	4.0	0.3	41%	24%	26%	5%
Fraser Coast	734,000	-12%	2,649,000	-24%	3.6	-0.5	47%	34%	14%	5%
Mackay	590,000	-6%	2,079,000	-28%	3.5	-1.1	24%	20%	49%	4%
Capricorn	927,000	31%	3,704,000	n/p	4.0	0.7	33%	26%	31%	6%
Bundaberg	489,000	-2%	2,148,000	36%	4.4	1.2	33%	39%	15%	3%
Whitsundays	449,000	-3%	1,961,000	4%	4.4	0.4	69%	18%	8%	3%
Outback	378,000	-2%	2,163,000	16%	5.7	0.9	41%	13%	38%	2%
Gladstone	284,000	-1%	1,198,000	19%	4.2	0.7	44%	40%	9%	2%
Western Downs	281,000	-16%	926,000	-10%	3.3	0.2	33%	37%	22%	2%
Southern Downs	261,000	n/p	558,000	19%	2.1	-0.7	60%	21%	17%	2%
Total	15,531,000	-3%	69,857,000	2%	4.5	0.2	45%	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	918,000	2%	16,043,000	2%	17.5	0.1	55%	28%	11%	46%
Gold Coast	**829,000**	**5%**	**8,184,000**	**7%**	**9.9**	**0.2**	**80%**	**15%**	**4%**	**42%**
TNQ	659,000	-9%	6,250,000	-4%	9.5	0.5	91%	5%	3%	33%
Sunshine Coast	280,000	0%	2,549,000	11%	9.1	0.9	79%	19%	2%	14%
Whitsundays	222,000	2%	1,284,000	-1%	5.8	-0.1	96%	3%	1%	11%
Fraser Coast	190,000	-4%	790,000	-11%	4.2	-0.3	95%	5%	1%	10%
Townsville	144,000	-1%	1,383,000	9%	9.6	0.9	82%	13%	3%	7%
CQ	130,000	7%	1,327,000	33%	10.2	2.0	85%	10%	5%	7%
SEQC	118,000	-1%	2,181,000	1%	18.5	0.4	42%	50%	5%	6%
Capricorn	81,000	4%	866,000	n/p	10.6	4.5	85%	10%	4%	4%
Gladstone	64,000	14%	461,000	-12%	7.2	-2.2	86%	8%	5%	3%
Mackay	55,000	4%	437,000	21%	8.0	1.2	76%	18%	4%	3%
Bundaberg	46,000	2%	633,000	10%	13.6	0.9	80%	17%	2%	2%
Toowoomba	36,000	-3%	651,000	9%	18.2	1.9	50%	33%	6%	2%
Outback	27,000	-13%	343,000	-23%	12.7	-1.4	89%	4%	4%	1%
Western Downs	12,000	0%	155,000	19%	12.8	2.4	75%	17%	0%	1%
Southern Downs	8,000	33%	165,000	2%	19.4	-5.7	75%	13%	0%	0%
Total	1,986,000	-2%	40,038,000	3%	20.2	0.9	72%	24%	8%	-

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

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

n/p – not published.