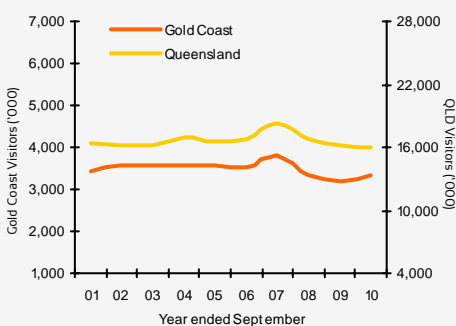


Year ended September 2010



	Visitors	Holiday	VFR	Business	Expenditure (\$m)
<b>Domestic overnight</b>	3,330,000	2,028,000	908,000	300,000	\$2,840
Annual change <sup>1</sup>	▲ 4%	▲ 2%	▲ 9%	▼ -3%	▼ -2%
Trend change <sup>2</sup>	▼ -5%	▼ -3%	▼ -7%	▼ -10%	▼ -2%
<b>International overnight</b>	842,000	664,000	125,000	38,000	\$998
Annual change	▲ 6%	▲ 6%	▼ -1%	▲ 15%	▼ -4%
Trend change	0%	0%	▲ 2%	▼ -4%	▲ 2%
<b>TOTAL</b>	4,172,000	2,692,000	1,033,000	338,000	\$3,838
Annual change	▲ 4%	▲ 3%	▲ 8%	▼ -1%	▼ -3%

### Domestic visitation

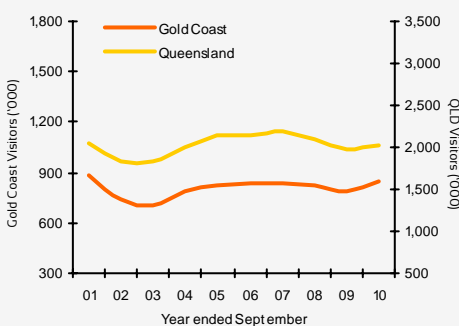


- The Gold Coast was one of only a handful of Queensland regions to see a stronger intrastate market, driven by Brisbane residents returning for a holiday (in contrast to the state trend). Additionally, holiday visitors from regional NSW and Melbourne provided an added boost to the regions results.

- The Gold Coast saw the largest number of family groups (parents and children) travelling on a holiday in Queensland, however this market dipped over the year. There was however, a resurgence in couples visiting for a holiday.

- With affordability remaining prominent in the domestic market, commercial caravan and camping accommodation subsequently saw the largest percentage growth in holiday visitors on the Gold Coast over the past year.

### International visitation

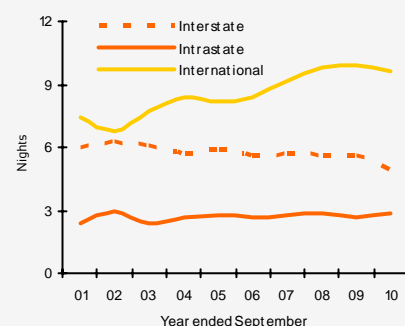


- The Gold Coast recorded an increase in international visitation driven by improved air capacity, spurring growth from a host of international markets.

- In contrast to the broader state trend, the Gold Coast recorded growth in visitation from the United Kingdom (UK) and New Zealand (NZ) markets. Economic conditions in the respective countries influenced the travel behaviour of UK and NZ visitors, who reduced their length of stay and number of stopovers on their trip.

- Significant growth came from a range of Asian markets, including Malaysia, Korea and the larger markets of Japan and China. The Gold Coast has the largest Japanese and Chinese markets in Queensland, with the majority of visitors travelling on a package tour also increasing.

### Average length of stay (Gold Coast)



- International visitor average length of stay eased over the year, driven by the decline in length of stay of NZ and UK visitors.

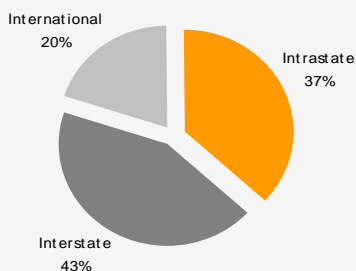
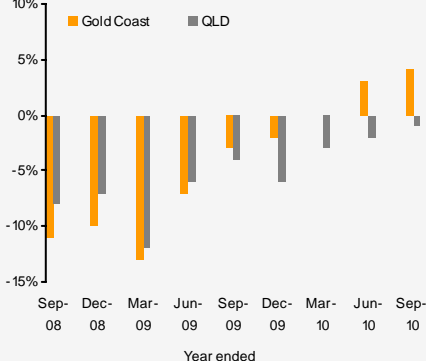
- The decline in interstate visitor length of stay indicates short break nature of domestic travel remains prominent, with a increase in the number of interstate visitors staying just 1-3 nights over the year. More affordable package deals and improved air capacity potentially influencing the length of stay in region.

- Intrastate visitor length of stay moved upward, albeit slightly, as Brisbane visitors return to the region following a period of decline.

- Expenditure results remained lower than this time last year, however international expenditure remains up on a trend basis.

### Total visitation

Annual percentage change in visitation



- There were 4,172,000 international and domestic overnight visitors to the Gold Coast in the year ended September 2010, this was an increase of 4% on the year ended September 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 visitation Year ended September 2010

### Domestic visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	2,028,000	2%	9,071,000	-6%	4.5	-0.3
VFR	908,000	9%	3,010,000	3%	3.3	-0.2
Business	300,000	-3%	987,000	17%	3.3	0.6
<b>Total<sup>3</sup></b>	<b>3,330,000</b>	<b>4%</b>	<b>13,372,000</b>	<b>-3%</b>	<b>4.0</b>	<b>-0.3</b>
<b>Intrastate</b>						
Holiday	977,000	10%	3,051,000	17%	3.1	0.2
VFR	438,000	10%	1,104,000	21%	2.5	0.2
Business	73,000	-42%	187,000	-39%	2.6	0.2
Total	1,544,000	6%	4,456,000	12%	2.9	0.2
<b>Interstate</b>						
Holiday	1,051,000	-4%	6,021,000	-14%	5.7	-0.7
VFR	470,000	8%	1,907,000	-5%	4.1	-0.5
Business	228,000	25%	801,000	50%	3.5	0.6
Total	1,786,000	2%	8,915,000	-9%	5.0	-0.6

### Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Gold Coast	6,175,000	5%	\$653	1%
Queensland	33,815,000	8%	\$3,676	17%
Australia	151,767,000	6%	\$15,520	7%

The increased trend towards day trips continued, with the comparative affordability of this type of travel a key factor.

### Key domestic source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	908,000	5%	2,359,000	22%
Regional Qld	637,000	9%	2,097,000	3%
Sydney	594,000	1%	2,657,000	-6%
Regional NSW	430,000	12%	1,785,000	2%
Melbourne	401,000	6%	2,200,000	-6%
Other	361,000	-10%	2,273,000	-20%

### State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	15,960,000	-1%	70,526,000	1%
NSW	23,404,000	5%	79,719,000	4%
Victoria	15,693,000	-1%	49,976,000	1%
Rest of Aus	14,046,000	-3%	60,725,000	0%
Australia	66,834,000	1%	260,946,000	2%

#### Holiday visitors

Queensland	6,969,000	-6%	34,469,000	-4%
NSW	10,420,000	3%	38,862,000	-1%
Victoria	7,341,000	-2%	24,998,000	0%
Rest of Aus	6,260,000	0%	28,635,000	0%
Australia	29,939,000	-1%	126,964,000	-1%

The business sector was the main driver for a small increase in domestic travel overall in Australia, with holiday travel easing slightly over the last year. Queensland and WA, both saw solid recovery in domestic business travel.



## International visitation Year ended September 2010

### International visitors to the Gold Coast

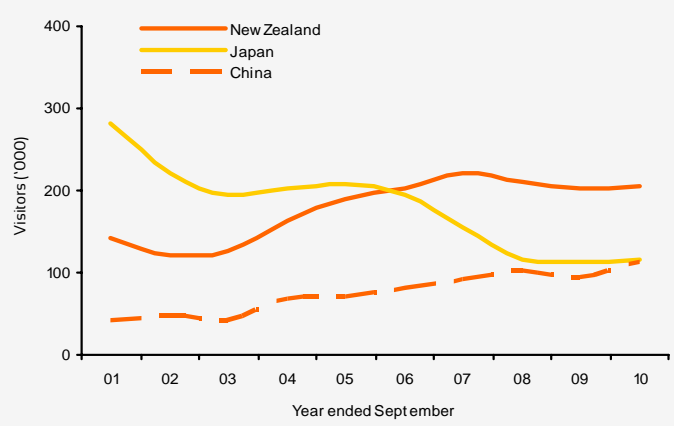
	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	664,000	6%	3,948,000	1%	5.9	-0.3
VFR	125,000	-1%	1,511,000	4%	12.1	0.5
Business	38,000	15%	203,000	31%	5.3	0.6
<b>Total<sup>3</sup></b>	<b>842,000</b>	<b>6%</b>	<b>8,057,000</b>	<b>3%</b>	<b>9.6</b>	<b>-0.3</b>

### Key international source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	205,000	1%	1,902,000	-9%
Japan	116,000	3%	842,000	-14%
China	114,000	19%	634,000	61%
United Kingdom	78,000	8%	643,000	-21%
Korea	39,000	18%	404,000	-9%

Holiday visitors				
New Zealand	136,000	1%	1,186,000	2%
China	103,000	16%	235,000	13%
Japan	98,000	0%	562,000	-11%
United Kingdom	60,000	7%	387,000	-13%
Korea	35,000	21%	218,000	7%

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



### State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,013,000	2%	39,008,000	-3%
NSW	2,835,000	7%	64,797,000	9%
Victoria	1,597,000	6%	40,403,000	7%
Rest of Aus	1,357,000	1%	40,186,000	7%
Australia	5,334,000	6%	184,395,000	6%

Holiday visitors				
Queensland	1,437,000	0%	18,079,000	-9%
NSW	1,604,000	6%	21,387,000	10%
Victoria	784,000	4%	8,656,000	9%
Rest of Aus	736,000	-2%	11,514,000	-4%
Australia	2,888,000	4%	59,636,000	1%

The return in international business travel was more prominent for NSW and VIC due to their large international business markets, subsequently fuelling the growth in international visitation seen to these states and Australia overall. While Queensland saw a more modest business recovery, the international holiday market continued to pick up.

Regional Snapshots for all Queensland regions are available on the TQ Research website, [www.tq.com.au/research](http://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](mailto:research@tq.com.au)

The Gold Coast tourism region aligns with the ABS region.



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Year ended September 2010

## Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,306,000	-8%	14,127,000	-3%	3.3	0.2	27%	39%	27%	27%
<b>Gold Coast</b>	<b>3,330,000</b>	<b>4%</b>	<b>13,372,000</b>	<b>-3%</b>	<b>4.0</b>	<b>-0.3</b>	<b>61%</b>	<b>27%</b>	<b>9%</b>	<b>21%</b>
Sunshine Coast	2,539,000	-1%	10,366,000	-4%	4.1	-0.1	61%	30%	5%	16%
SEQC	2,447,000	4%	7,141,000	9%	2.9	0.1	38%	45%	11%	15%
TNQ	1,366,000	-13%	7,727,000	0%	5.7	0.8	57%	23%	17%	9%
Toowoomba	1,280,000	7%	4,069,000	15%	3.2	0.2	32%	43%	19%	8%
CQ	1,092,000	0%	3,964,000	-1%	3.6	-0.1	33%	32%	29%	7%
Capricorn	833,000	3%	3,264,000	6%	3.9	0.1	34%	28%	30%	5%
Townsville	815,000	1%	2,858,000	-17%	3.5	-0.7	28%	26%	33%	5%
Mackay	676,000	22%	2,700,000	28%	4.0	0.2	21%	25%	48%	4%
Bundaberg	554,000	8%	2,182,000	15%	3.9	0.2	35%	29%	21%	3%
Fraser Coast	546,000	-13%	2,119,000	-24%	3.9	-0.5	52%	29%	13%	3%
Whitsundays	498,000	20%	2,270,000	23%	4.6	0.1	71%	14%	11%	3%
Southern Downs	357,000	n/p	761,000	n/p	2.1	n/p	50%	33%	15%	2%
Outback	345,000	n/p	1,956,000	n/p	5.7	n/p	36%	21%	34%	2%
Gladstone	319,000	8%	1,046,000	-17%	3.3	-1.0	38%	38%	20%	2%
Western Downs	314,000	n/p	862,000	n/p	2.7	n/p	43%	29%	20%	2%
<b>Total</b>	<b>15,960,000</b>	<b>-1%</b>	<b>70,526,000</b>	<b>1%</b>	<b>4.4</b>	<b>0.1</b>	<b>44%</b>	<b>32%</b>	<b>20%</b>	<b>-</b>

## International Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	914,000	0%	16,012,000	-1%	17.5	-0.2	53%	29%	12%	45%
<b>Gold Coast</b>	<b>842,000</b>	<b>6%</b>	<b>8,057,000</b>	<b>3%</b>	<b>9.6</b>	<b>-0.3</b>	<b>79%</b>	<b>15%</b>	<b>5%</b>	<b>42%</b>
TNQ	672,000	1%	6,001,000	-8%	8.9	-0.9	91%	4%	3%	33%
Sunshine Coast	282,000	0%	2,479,000	-4%	8.8	-0.3	79%	18%	2%	14%
Whitsundays	208,000	-7%	1,215,000	-6%	5.8	0.0	96%	2%	1%	10%
Fraser Coast	178,000	-4%	738,000	2%	4.2	0.3	94%	5%	1%	9%
Townsville	132,000	-10%	1,451,000	9%	11.0	1.9	81%	11%	5%	7%
CQ	122,000	-5%	929,000	-19%	7.6	-1.3	87%	9%	3%	6%
SEQC	121,000	2%	1,976,000	-13%	16.4	-2.8	41%	49%	7%	6%
Capricorn	75,000	-11%	528,000	-30%	7.0	-2.0	85%	11%	4%	4%
Gladstone	62,000	2%	401,000	3%	6.5	0.1	90%	6%	3%	3%
Mackay	51,000	-6%	403,000	-11%	7.9	-0.5	76%	20%	4%	3%
Bundaberg	41,000	-20%	653,000	5%	15.9	3.6	80%	17%	0%	2%
Toowoomba	37,000	-8%	642,000	-10%	17.2	-0.5	49%	32%	11%	2%
Outback	26,000	n/p	282,000	n/p	10.7	n/p	85%	8%	4%	1%
Southern Downs	11,000	n/p	147,000	n/p	13.4	n/p	73%	18%	0%	1%
Western Downs	11,000	n/p	133,000	n/p	11.9	n/p	64%	9%	9%	1%
<b>Total</b>	<b>2,013,000</b>	<b>2%</b>	<b>39,008,000</b>	<b>-3%</b>	<b>19.4</b>	<b>-0.8</b>	<b>71%</b>	<b>24%</b>	<b>8%</b>	<b>-</b>

Data sources: National 6 International Visitor Surveys, Tourism Research Australia.

1. Annual change refers to the percentage change between the year ended September 2010 vs. year ended September 2009.

2. Trend change refers to the percentage change between the 3 years to September 2009 vs. the 3 years to September 2010.

3. This figure includes "Other" visitors.

4. South East Queensland Country.

n/p not published.