Gold Coast Regional Snapshot

Tourism Queensland

Year ended March 2011

IMPORTANT MESSAGE:

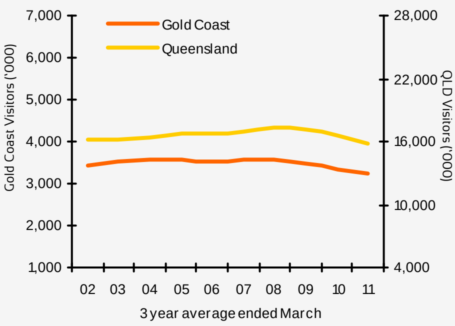
Due to severe weather events in Queensland in 2011 and their impact on surveying for the National Visitor Survey (NVS), domestic tourism region data will not be published in Tourism Queensland's Regional Snapshots for the year ended March 2011. Instead, domestic data for tourism regions will be presented as a 3 year average, with change over time shown as a 3 year trend change, not year on year change as in previous regional snapshots. Please note that the trend variances provided incorporate changes that occurred in tourism during the onset of the Global Financial Crisis and look at longer term trends rather than recent changes over the last year.

National and state level NVS data will be published as normal on a year ended basis.

Surveying was not impacted for the International Visitor Survey so year end data and year on year variances are provided as normal.

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic overnight 3 year average	3,243,000	1,981,000	873,000	304,000	$2,783
Trend change[1]	▼ -3%	▼ -3%	▼ -2%	▼ -11%	▼ -5%
International overnight	783,000	606,000	122,000	38,000	$886
Annual change[2]	▼ -6%	▼ -8%	▼ -1%	▲ 15%	▼ -13%
Trend change	▼ -3%	▼ -4%	▲ 4%	▼ -9%	▼ -3%

Domestic visitation



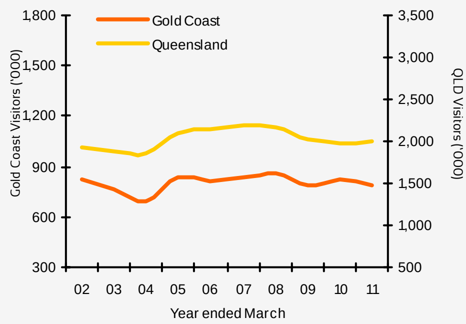
▪ The recent recovery in domestic visitation to the Gold Coast is yet to account for declines seen as a result of the Global Financial Crisis (GFC).

▪ On a trend basis (over the 3 years ended March 2011) the Gold Coast saw business travel decrease in line with reduced business confidence. Similarly, weaker consumer confidence had a significant impact on interstate holiday travel within Australia and for the Gold Coast.

▪ A trend towards travel close to home within Queensland saw intrastate holiday visitation to the Gold Coast remain more stable than that of interstate, having not seen the declines of interstate during the GFC.

▪ More recently, intrastate visitation has been heavily impacted by the growth in interstate travel by Queenslander's.

International visitation



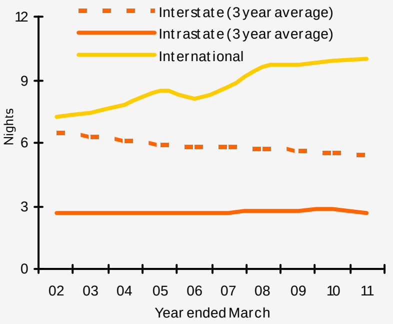
▪ Despite overall declines in international travel to the Gold Coast, there was growth in business travel, driven by the Chinese business market.

▪ Holiday visitation was down due to declines from New Zealand and Japan that were the result of recent earthquake disasters in these countries.

▪ The Gold Coast saw growth from Asia due to rising consumer confidence and improved air access in these markets. Growth was primarily from China, Malaysia and Singapore.

▪ Travel from the United Kingdom (UK) and Europe declined substantially associated with softer economic conditions in these source markets. Consumer confidence also remained weak in the UK, with ongoing concerns around job security and finances.

Average length of stay (Gold Coast)



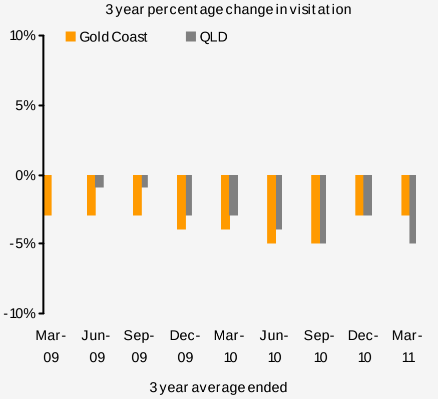
▪ International visitor's length of stay has seen relatively consistent growth since 2003 for the Gold Coast, with an average length of stay (ALOS) of 10 days in the year ending March 2011. This has been driven by employment and education, particularly from Asian markets.

▪ The length of stay for intrastate visitors remained virtually unchanged, with the Gold Coast still a popular short break (1-3 nights) destination.

▪ Interstate visitor ALOS continued to decline for the Gold Coast and this was evident across holiday and business markets. VFR and business travel has become much more focussed on travel of 3 nights or less over the last decade.

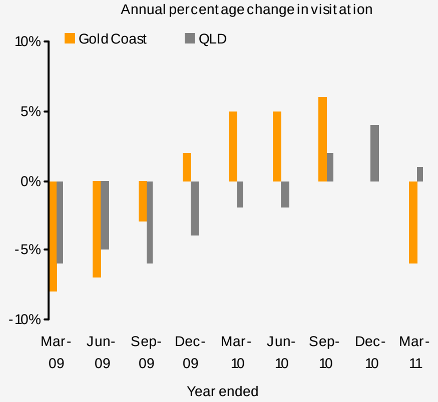
Domestic visitation

3 year percentage change in visitation



International visitation

Annual percentage change in visitation



Domestic visitation to the Gold Coast, in line with national trends, has continued to decline long term. While the international market had rebounded during 2010, the year ending March 2011 saw a decline in international visitors to the Gold Coast. While the domestic market declines were slightly less than those of the state average, the recent international declines were in contrast to the slight increase seen at the state level.

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Gold Coast Regional Snapshot

Tourism Queensland

Domestic visitation

Domestic visitors to the Gold Coast 3 year average to March 2011

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change
Holiday	1,981,000	-3%	9,308,000	-6%	4.7	-0.1
VFR	873,000	-2%	2,904,000	-9%	3.3	-0.2
Business	304,000	-11%	905,000	-9%	3.0	0.0
Total[3]	3,243,000	-3%	13,437,000	-7%	4.1	-0.2
Intrastate						
Holiday	914,000	-2%	2,694,000	-10%	2.9	-0.3
VFR	425,000	-5%	976,000	-5%	2.3	0.0
Business	102,000	1%	239,000	-7%	2.3	-0.2
Total	1,487,000	-2%	4,017,000	-8%	2.7	-0.2
Interstate						
Holiday	1,067,000	-4%	6,613,000	-5%	6.2	0.0
VFR	447,000	1%	1,928,000	-11%	4.3	-0.6
Business	202,000	-15%	665,000	-10%	3.3	0.2
Total	1,756,000	-4%	9,419,000	-7%	5.4	-0.1

Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure ($) million	Annual % change
Gold Coast[4]	6,240,000	11%	$651	12%
Queensland	34,258,000	7%	$3,627	7%
Australia	151,948,000	3%	$14,950	-1%

Consumers remain budget conscious with global and domestic uncertainties continuing to subdue consumer confidence. As a result, domestic travellers are increasingly taking more affordable day trips, rather than overnight trips.

Key domestic source markets to the Gold Coast 3 year average to March 2011

Total visitors	Visitors	Trend % change	Nights	Trend % change
Brisbane	893,000	-4%	2,103,000	-12%
Regional Qld	593,000	1%	1,915,000	-3%
Sydney	570,000	-3%	2,688,000	-3%
Regional NSW	418,000	-5%	1,871,000	-11%
Melbourne	388,000	-3%	2,274,000	-6%
Other	380,000	-6%	2,586,000	-8%

State comparison Domestic year ended March 2011

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,037,000	3%	67,025,000	-4%
NSW	23,505,000	4%	79,124,000	3%
Victoria	16,084,000	1%	49,663,000	-1%
Rest of Aus	14,251,000	1%	61,230,000	2%
Australia	67,605,000	2%	257,042,000	0%
Holiday visitors				
Queensland	6,914,000	-1%	33,885,000	-3%
NSW	10,203,000	-1%	38,833,000	2%
Victoria	7,504,000	0%	25,048,000	-1%
Rest of Aus	6,168,000	-2%	28,744,000	-1%
Australia	29,676,000	-1%	126,510,000	-1%

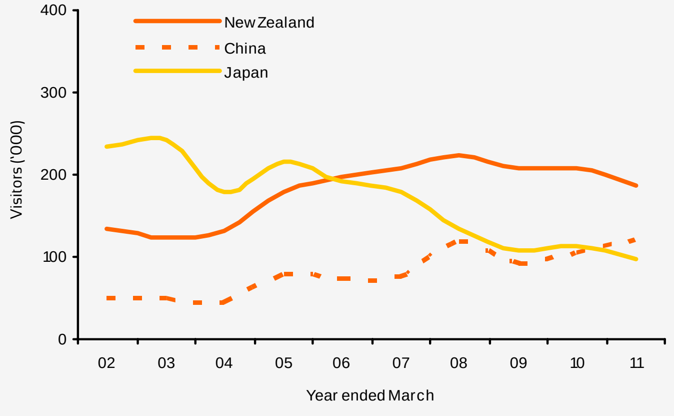
Recovery in domestic tourism has continued, despite adverse weather conditions affecting Australia's eastern mainland states in the summer of 2010/2011. However, the holiday sector weakened as a consequence of low consumer confidence, with only resource rich WA recording growth.

International visitation Year ended March 2011

International visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	606,000	-8%	3,745,000	-7%	6.2	0.1
VFR	122,000	-1%	1,547,000	0%	12.7	0.1
Business	38,000	15%	223,000	29%	5.9	0.7
Total[3]	783,000	-6%	7,799,000	-5%	10.0	0.1

New Zealand, Chinese and Japanese visitors to the Gold Coast YE March 02-11



Key international source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	188,000	-9%	1,811,000	-14%
China	121,000	14%	792,000	33%
Japan	97,000	-15%	898,000	10%
United Kingdom	63,000	-23%	685,000	-5%
Korea	35,000	-3%	487,000	-6%
Holiday visitors				
New Zealand	120,000	-15%	1,041,000	-17%
China	106,000	8%	246,000	11%
Japan	83,000	-16%	614,000	6%
United Kingdom	47,000	-27%	328,000	-28%
Korea	33,000	6%	294,000	18%

State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	2,002,000	1%	39,474,000	-1%
NSW	2,829,000	3%	66,266,000	7%
Victoria	1,693,000	10%	40,628,000	2%
Rest of Aus	1,394,000	3%	40,232,000	3%
Australia[5]	5,396,000	4%	186,600,000	3%
Holiday visitors				
Queensland	1,379,000	-3%	17,804,000	-8%
NSW	1,573,000	0%	20,642,000	-2%
Victoria	810,000	7%	7,910,000	-2%
Rest of Aus	755,000	1%	11,414,000	-7%
Australia[5]	2,866,000	1%	57,770,000	-5%

International tourism to Australia recovered in the year ending March 2011, boosted by long-haul business and visitation from China. Queensland saw similar trends, although growth was more subdued due to the decline in international holiday visitors, particularly those from the United Kingdom, New Zealand and the United States.

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

Regional visitation

Domestic Regional Comparison (3 year average to March 2011)

	Visitors	Trend % change	Nights	Trend % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	4,538,000	-1%	14,155,000	-1%	3.1	0.0	29%	38%	26%	28%
Gold Coast	**3,243,000**	**-3%**	**13,437,000**	**-7%**	**4.1**	**-0.2**	**61%**	**27%**	**9%**	**20%**
Sunshine Coast	2,615,000	-5%	10,560,000	-6%	4.0	-0.1	61%	29%	7%	16%
TNQ	1,384,000	-7%	7,393,000	-4%	5.3	0.2	55%	24%	17%	9%
Toowoomba	1,186,000	-5%	3,526,000	-1%	3.0	0.1	31%	41%	21%	7%
Townsville	783,000	-12%	3,011,000	-9%	3.8	0.1	33%	28%	29%	5%
Capricorn	776,000	-9%	2,847,000	-4%	3.7	0.2	33%	28%	31%	5%
Mackay	588,000	-10%	2,388,000	-9%	4.1	0.1	27%	28%	40%	4%
Fraser Coast	572,000	1%	2,326,000	-5%	4.1	-0.3	49%	33%	14%	4%
Bundaberg	513,000	-5%	1,819,000	-7%	3.5	-0.1	35%	37%	19%	3%
Whitsundays	458,000	-3%	1,973,000	1%	4.3	0.2	69%	16%	12%	3%
Outback	361,000	-10%	1,867,000	-6%	5.2	0.2	37%	19%	37%	2%
Gladstone	312,000	-4%	1,323,000	10%	4.2	0.6	46%	30%	20%	2%
Western Downs	301,000	-22%	878,000	-19%	2.9	0.1	43%	26%	24%	2%
Southern Downs	247,000	0%	586,000	-4%	2.4	-0.1	52%	31%	13%	2%
Total	15,876,000	-5%	68,430,000	-5%	4.3	0.0	44%	32%	20%	-

Please note the total for all regions uses 3 year average visitation data and trend % change to provide a meaningful point of comparison with the regional data presented. The total figures above will differ to those in the State Comparison on page 2 of this snapshot, which use year end March 2011 visitation data and year on year % change.

International Regional Comparison (Year ended March 2011)

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	926,000	1%	17,018,000	6%	18.4	0.9	49%	30%	13%	46%
Gold Coast	**783,000**	**-6%**	**7,799,000**	**-5%**	**10.0**	**0.1**	**77%**	**16%**	**5%**	**39%**
TNQ	661,000	0%	5,830,000	-7%	8.8	-0.7	91%	5%	3%	33%
Sunshine Coast	271,000	-3%	2,646,000	4%	9.8	0.7	78%	18%	3%	14%
Whitsundays	191,000	-14%	1,086,000	-15%	5.7	-0.1	96%	3%	1%	10%
Fraser Coast	151,000	-19%	565,000	-26%	3.7	-0.4	97%	4%	0%	8%
Townsville	124,000	-14%	1,361,000	-2%	11.0	1.4	78%	13%	5%	6%
Capricorn	72,000	-11%	499,000	-42%	7.0	-3.6	81%	11%	4%	4%
Gladstone	57,000	-11%	243,000	-47%	4.3	-2.9	88%	7%	5%	3%
Mackay	46,000	-16%	350,000	-20%	7.6	-0.4	76%	17%	7%	2%
Bundaberg	40,000	-13%	746,000	18%	18.6	5.0	78%	15%	0%	2%
Toowoomba	36,000	-8%	703,000	3%	19.6	2.1	44%	33%	14%	2%
Outback	24,000	-11%	253,000	-26%	10.5	-2.2	75%	13%	8%	1%
Western Downs	12,000	0%	167,000	8%	14.1	1.3	58%	17%	8%	1%
Southern Dns	10,000	25%	205,000	24%	20.0	0.6	70%	30%	0%	0%
Total	2,002,000	1%	39,474,000	-1%	19.7	-0.5	69%	25%	9%	-

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

1. Trend change refers to the percentage change between the 3 years average ended March 2010 vs. the 3 years average ended March 2011.
2. Annual change refers to the percentage change between the year ended March 2010 vs. year ended March 2011.
3. This figure includes "Other" visitors.
4. 3 year average ended March 2011.
5. Excludes Transit visitors who did not have a stopover place.

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.