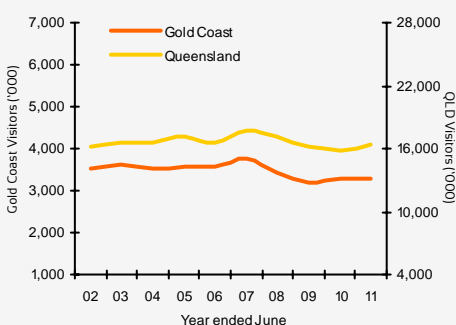


Year ended June 2011

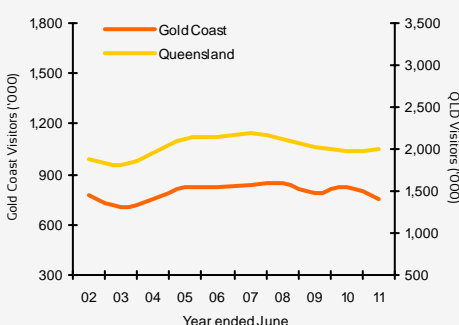


	Visitors	Holiday	VFR	Business	Expenditure (\$m)
<b>Domestic overnight</b>	3,300,000	1,863,000	970,000	344,000	\$2,574
Annual change <sup>1</sup>	▲ 1%	▼ -11%	▲ 13%	▲ 30%	▼ -14%
Trend change <sup>2</sup>	▼ -1%	▼ -4%	▲ 3%	▼ -3%	▼ -6%
<b>International overnight</b>	753,000	581,000	123,000	35,000	\$822
Annual change	▼ -9%	▼ -11%	▼ -1%	▲ 3%	▼ -19%
Trend change	▼ -4%	▼ -5%	▲ 1%	▼ -7%	▼ -4%
<b>TOTAL</b>	<b>4,053,000</b>	<b>2,444,000</b>	<b>1,093,000</b>	<b>379,000</b>	<b>\$3,396</b>
Annual change	▼ -1%	▼ -11%	▲ 11%	▲ 27%	▼ -15%

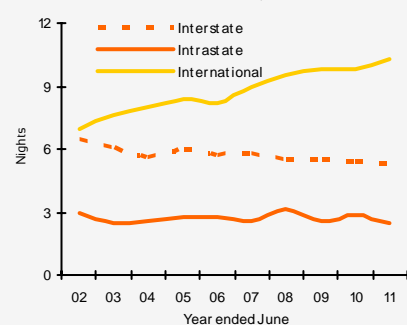
Domestic visitation



International visitation



Average length of stay (Gold Coast)



Domestic overnight visitation to the Gold Coast increased slightly in the year ending June 2011, driven by VFR (visiting friends and relatives) and business. However, holiday travel was weaker as a result of declines from Brisbane families. Regardless, holiday remains the main reason visitors travel to the Gold Coast, with families being a large segment of the holiday market (41%).

Growth in visitation was achieved from regional QLD and regional NSW. However, this was offset by declines from key source markets of Brisbane and Sydney, particularly those travelling for a holiday.

There was growth in young (15 to 29 years) single travellers to the region and as a result there were increases in the number of people travelling alone.

The Gold Coast has seen declines in international visitation, the result of a drop in holiday visitors.

Despite continued growth in visitation from China, the Gold Coast had declines from significant markets such as Japan, New Zealand (NZ) and the United Kingdom (UK). The declines from Japan and NZ were a direct result of the earthquakes that impacted these countries in early 2011.

Travel from the UK to the Gold Coast and Australia declined due to a weak economy, low consumer confidence and high youth unemployment in the UK.

International visitors reduced their average spend per night on the Gold Coast (down 15%). On-going economic uncertainty and a strong Australian dollar has seen travellers tighten their belts.

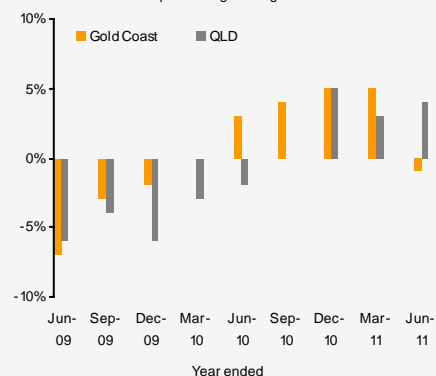
Domestic overnight visitors reduced their average stay on the Gold Coast during the year ending June 2011, driven by those caravanning or camping in the region.

Intrastate visitors average length of stay declined, however interstate travellers increased their average stay in the region. This was particularly driven by visitors from Victoria. Visitors from NSW, on the other hand, decreased their average length of stay.

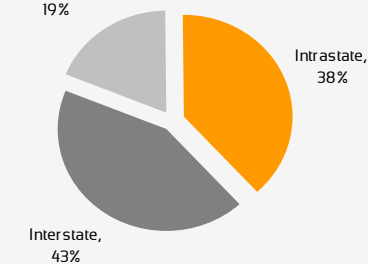
International visitors' average stay on the Gold Coast continued to increase. This was driven by VFR visitors from the UK and Asia (excluding China). Holiday visitors from the United States and Japan also increased their average stay, resulting in increases in total nights from these markets (despite declines in visitation).

Total visitation

Annual percentage change in visitation



International, 19%



There were 4,053,000 international and domestic overnight visitors to the Gold Coast in the year ended June 2011. This was a decline of 1% from the previous year, the result of a weaker holiday market.

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## Domestic visitation Year ended June 2011

### Domestic visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	1,863,000	-11%	8,798,000	-10%	4.7	0.0
VFR	970,000	13%	2,953,000	-2%	3.0	-0.5
Business	344,000	30%	969,000	10%	2.8	-0.5
<b>Total<sup>3</sup></b>	<b>3,300,000</b>	<b>1%</b>	<b>13,034,000</b>	<b>-6%</b>	<b>3.9</b>	<b>-0.3</b>
<b>Intrastate</b>						
Holiday	840,000	-16%	2,435,000	-22%	2.9	-0.2
VFR	518,000	32%	996,000	3%	1.9	-0.6
Business	112,000	n/p	266,000	n/p	2.4	-0.1
<b>Total</b>	<b>1,559,000</b>	<b>5%</b>	<b>3,877,000</b>	<b>-11%</b>	<b>2.5</b>	<b>-0.4</b>
<b>Interstate</b>						
Holiday	1,023,000	-6%	6,363,000	-4%	6.2	0.1
VFR	453,000	-3%	1,957,000	-4%	4.3	-0.1
Business	232,000	21%	703,000	2%	3.0	-0.6
<b>Total</b>	<b>1,741,000</b>	<b>-2%</b>	<b>9,157,000</b>	<b>-4%</b>	<b>5.3</b>	<b>-0.1</b>

### Domestic day trip visitors

	Day trip visitors	Annual % change	Expenditure (\$ million)	Annual % change
Gold Coast	7,331,000	29%	\$710	26%
Queensland	33,684,000	1%	\$3,408	-5%
Australia	151,915,000	1%	\$14,830	-4%

Nationally, the previous growth in day trips slowed and the amount which they spent on their trips declined. Low consumer confidence and increasing costs of living has seen domestic visitors reduce their spending on travel.

### Key domestic source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
Brisbane	899,000	-4%	2,058,000	-12%
Regional Qld	660,000	20%	1,819,000	-10%
Sydney	525,000	-11%	2,481,000	-6%
Regional NSW	452,000	10%	1,898,000	0%
Melbourne	413,000	2%	2,494,000	2%
Other	351,000	-6%	2,556,000	-11%

### State comparison - Domestic

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	16,429,000	4%	68,489,000	-3%
NSW	24,106,000	5%	81,126,000	5%
Victoria	16,360,000	3%	50,005,000	0%
Rest of Aus	14,321,000	1%	60,310,000	-1%
Australia	68,944,000	4%	259,931,000	0%

#### Holiday visitors

Queensland	6,960,000	-1%	34,008,000	-2%
NSW	10,234,000	-2%	39,375,000	2%
Victoria	7,724,000	3%	25,652,000	2%
Rest of Aus	6,130,000	-3%	28,313,000	-3%
Australia	29,904,000	-1%	127,349,000	0%

While domestic visitation has increased, these travellers are tending to stay closer to home, making less stopovers and are spending less. Even the previous rapid growth in outbound travel has slowed, particularly due to recent increases in the cost of airfares.

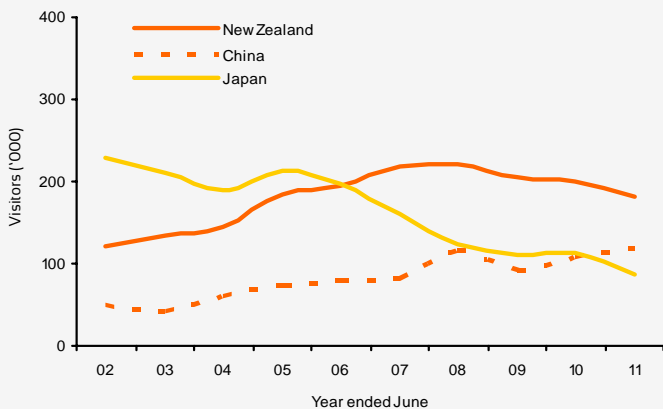


## International visitation Year ended June 2011

### International visitors to the Gold Coast

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change
Holiday	581,000	-11%	3,660,000	-8%	6.3	0.3
VFR	123,000	-1%	1,719,000	11%	14.0	1.5
Business	35,000	3%	214,000	31%	6.2	1.4
<b>Total<sup>3</sup></b>	<b>753,000</b>	<b>-9%</b>	<b>7,723,000</b>	<b>-4%</b>	<b>10.3</b>	<b>0.5</b>

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



### Key international source markets to the Gold Coast

Total visitors	Visitors	Annual % change	Nights	Annual % change
New Zealand	182,000	-9%	1,753,000	-5%
China	118,000	10%	763,000	25%
Japan	86,000	-25%	896,000	3%
United Kingdom	63,000	-21%	706,000	4%
Korea	33,000	-13%	466,000	-5%

#### Holiday visitors

New Zealand	114,000	-16%	947,000	-16%
China	103,000	4%	241,000	6%
Japan	73,000	-25%	659,000	15%
United Kingdom	47,000	-24%	315,000	-25%
Korea	31,000	-6%	290,000	22%

### State comparison - International

Total visitors	Visitors	Annual % change	Nights	Annual % change
Queensland	1,989,000	1%	39,644,000	2%
NSW	2,812,000	1%	67,436,000	7%
Victoria	1,734,000	12%	41,081,000	0%
Rest of Aus	1,415,000	5%	40,990,000	5%
Australia	5,416,000	4%	189,150,000	4%

#### Holiday visitors

Queensland	1,345,000	-5%	17,724,000	-5%
NSW	1,565,000	0%	21,000,000	-1%
Victoria	842,000	12%	8,076,000	-5%
Rest of Aus	759,000	3%	11,543,000	-4%
Australia	2,861,000	1%	58,343,000	-4%

International visitation to Australia continued to grow, boosted by expanding air capacity and travel for VFR and business. Asian markets have remained buoyant, fuelled by increasing standards of living in these countries.

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 June 2011

## Domestic Regional Comparison

	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of visitors to QLD
Brisbane	5,045,000	18%	15,348,000	13%	3.0	-0.2	29%	36%	27%	31%
<b>Gold Coast</b>	<b>3,300,000</b>	<b>1%</b>	<b>13,034,000</b>	<b>-6%</b>	<b>3.9</b>	<b>-0.3</b>	<b>56%</b>	<b>29%</b>	<b>10%</b>	<b>20%</b>
Sunshine Coast	2,783,000	14%	10,652,000	0%	3.8	-0.5	58%	28%	10%	17%
TNQ	1,266,000	-10%	7,270,000	-6%	5.7	0.2	55%	19%	21%	8%
Toowoomba	1,250,000	0%	3,490,000	-11%	2.8	-0.4	32%	36%	23%	8%
Capricorn	837,000	1%	2,506,000	-21%	3.0	-0.8	33%	31%	26%	5%
Townsville	716,000	-9%	2,677,000	-20%	3.7	-0.5	34%	35%	24%	4%
Mackay	575,000	-4%	1,982,000	-16%	3.4	-0.6	25%	28%	37%	3%
Bundaberg	502,000	-4%	1,631,000	-17%	3.3	-0.4	33%	29%	30%	3%
Fraser Coast	495,000	-10%	1,775,000	-18%	3.6	-0.3	48%	30%	15%	3%
Whitsundays	490,000	6%	2,080,000	-2%	4.2	-0.4	65%	25%	9%	3%
Gladstone	408,000	22%	1,576,000	19%	3.9	-0.1	48%	28%	21%	2%
Western Downs	365,000	n/p	970,000	n/p	2.7	-0.2	51%	19%	24%	2%
Outback	310,000	n/p	1,565,000	n/p	5.0	-0.7	45%	15%	34%	2%
Southern Downs	298,000	n/p	751,000	n/p	2.5	0.4	50%	35%	12%	2%
<b>Total</b>	<b>16,429,000</b>	<b>4%</b>	<b>68,489,000</b>	<b>-3%</b>	<b>4.2</b>	<b>-0.3</b>	<b>42%</b>	<b>32%</b>	<b>21%</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	928,000	3%	17,116,000	8%	18.5	1.0	49%	30%	14%	47%
<b>Gold Coast</b>	<b>753,000</b>	<b>-9%</b>	<b>7,723,000</b>	<b>-4%</b>	<b>10.3</b>	<b>0.5</b>	<b>77%</b>	<b>16%</b>	<b>5%</b>	<b>38%</b>
TNQ	649,000	-1%	5,663,000	-7%	8.7	-0.6	91%	5%	3%	33%
Sunshine Coast	260,000	-7%	2,678,000	7%	10.3	1.4	76%	20%	3%	13%
Whitsundays	187,000	-12%	1,086,000	-6%	5.8	0.4	96%	2%	1%	9%
Fraser Coast	148,000	-17%	543,000	-28%	3.7	-0.5	95%	5%	0%	7%
Townsville	120,000	-13%	1,306,000	-8%	10.9	0.6	78%	13%	5%	6%
Capricorn	68,000	-12%	530,000	-23%	7.8	-1.1	82%	10%	4%	3%
Gladstone	55,000	-14%	251,000	-40%	4.6	-2.0	85%	9%	5%	3%
Mackay	46,000	-12%	420,000	3%	9.1	1.2	74%	20%	7%	2%
Toowoomba	39,000	5%	872,000	34%	22.4	4.6	44%	33%	13%	2%
Bundaberg	39,000	-7%	735,000	14%	19.0	3.7	74%	18%	3%	2%
Outback	24,000	n/p	255,000	n/p	10.6	-1.2	71%	13%	13%	1%
Western Downs	14,000	n/p	275,000	n/p	19.5	4.3	57%	14%	7%	1%
Southern Downs	11,000	n/p	296,000	n/p	27.3	15.8	64%	18%	9%	1%
<b>Total</b>	<b>1,989,000</b>	<b>1%</b>	<b>39,644,000</b>	<b>2%</b>	<b>19.9</b>	<b>0.1</b>	<b>68%</b>	<b>25%</b>	<b>10%</b>	<b>-</b>

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.

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.