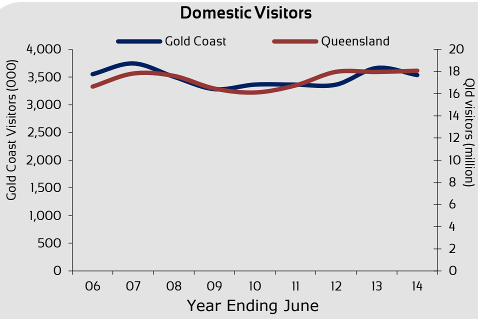
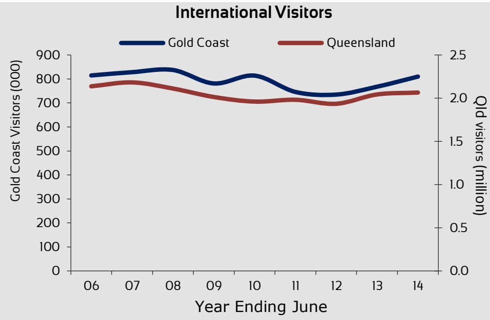
Gold Coast Regional Snapshot

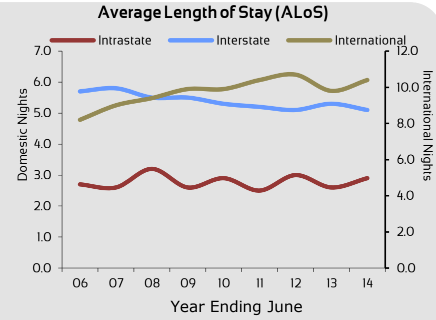
Tourism and Events Queensland

Year Ending June 2014

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	3,536,000	2,188,000	962,000	319,000	$3,194.3m
Annual % change[1]	▼ -3.5%	▼ -0.9%	▼ -6.2%	▼ -12.1%	▲ 2.9%
Trend % change[2]	▲ 1.7%	▲ 3.9%	▲ 0.6%	▼ -2.8%	▲ 6.1%
International Overnight	810,000	641,000	127,000	27,000	$968.9m
Annual % change	▲ 5.5%	▲ 9.1%	▼ -1.9%	▼ -23.3%	▲ 13.4%
Trend % change	▲ 2.8%	▲ 3.9%	▲ 0.9%	▼ -5.1%	▲ 6.0%
TOTAL	**4,346,000**	**2,829,000**	**1,089,000**	**346,000**	**$4,163.2m**
Annual change	▼ -1.9%	▲ 1.2%	▼ -5.8%	▼ -13.1%	▲ 5.2%







▪ Domestic overnight visitation to the Gold Coast declined 3.5% in the year to June 2014, with a decrease in the number of business travellers contributing to this result. Those visiting friends and relatives (VFR) also declined, whilst holiday travel was relatively stable. The silver lining to these results was a 2.9% increase in overnight visitor expenditure, which suggests that whilst less visitors came to the Gold Coast in the year to June 2014, those that did spent more.

▪ The Gold Coast remained a very popular destination amongst Queensland holidaymakers, with intrastate holiday travel increasing 10.4% in the past year. In contrast, this result was offset by a decline in the number of interstate holidaymakers, particularly from Sydney. The Melbourne holiday market was the polar opposite to Sydney, with holidaymakers from Melbourne increasing 22.1% to 320,000, overtaking the number of Sydney holiday visitors in the process.

▪ Total domestic business travel to the Gold Coast continued to decline, which was in contrast to statewide results.

▪ The Gold Coast continues to lead the State in terms of international visitation, with traveller numbers increasing 5.5% to 810,000. This growth was exclusively driven by the higher yielding holiday sector, which contributed to a 13.4% increase in international overnight visitor expenditure.

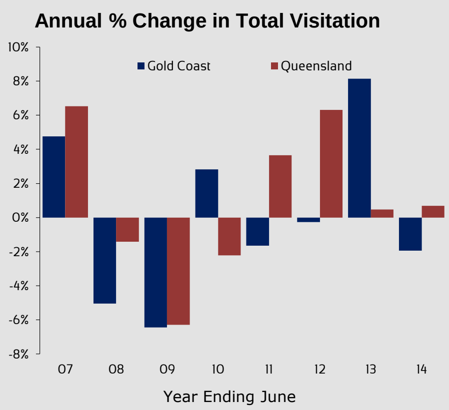
▪ Strong international visitor growth was recorded from New Zealand (up 8.9% or an additional 15,000 people) and China (up 4.2% or an additional 8,000 people). These two countries remain the region's largest international source markets.

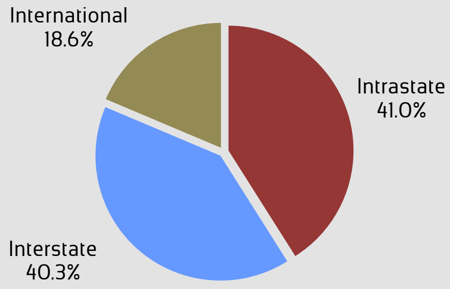
▪ This growth was complemented by very healthy results from smaller Asian markets, including Hong Kong (up 15.2%), Malaysia (up 40.4%) and India (up 28.4%). It should be noted however, that visitor numbers from these markets are much lower than New Zealand and China.

▪ The Gold Coast also recorded a 3.3% increase in travel from Japan, which is welcomed after the declines seen in recent years.

▪ The average length of stay of domestic overnight visitors to the Gold Coast remained stable at 4 nights in the year to June 2014. This was much higher amongst interstate travellers (5.1 nights) compared to Queensland residents (2.9 nights). Whilst the average length of stay of domestic visitors remained stable, domestic overnight visitor expenditure increased 2.9% to $3.2 billion. This represents an additional $90.2 million spent in the past year.

▪ The average length of stay of international visitors to the Gold Coast increased by 0.6 nights to 10.4 nights, which suggests that those that are travelling are opting for marginally longer trips. This increase in the length of stay of international visitors to the Gold Coast, coupled with a strong increase from the holiday sector, contributed to a 13.4% increase in international overnight visitor expenditure. This growth equates to an additional $114.7 million spent in the region by international travellers in the past year.





There were 4,346,000 international and domestic overnight visitors to the Gold Coast in the year ended June 2014, this was an decrease of 1.9% on the year ended June 2013.

Research Updates

To receive an email alert whenever new touism figures are released click here

Gold Coast Regional Snapshot

Tourism and Events Queensland

Domestic visitation Year Ending June 2014

Domestic Visitors to Gold Coast

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	2,188,000	-0.9%	9,497,000	-7.6%	4.3	-0.4
VFR	962,000	-6.2%	3,235,000	-2.7%	3.4	0.2
Business	319,000	-12.1%	996,000	10.4%	3.1	0.6
Domestic[3]	**3,536,000**	-3.5%	**14,043,000**	-5.1%	**4.0**	0.0
Intrastate						
Holiday	1,136,000	10.4%	3,551,000	19.8%	3.1	0.2
VFR	496,000	-7.1%	1,179,000	8.8%	2.4	0.4
Business	126,000	-20.8%	330,000	-13.8%	2.6	0.2
Intrastate	**1,783,000**	2.1%	**5,108,000**	12.4%	**2.9**	0.3
Interstate						
Holiday	1,052,000	-10.8%	5,946,000	-18.7%	5.7	-0.5
VFR	466,000	-5.5%	2,056,000	-8.3%	4.4	-0.1
Business	192,000	-5.9%	666,000	28.6%	3.5	1.0
Interstate	**1,753,000**	-8.6%	**8,935,000**	-12.8%	**5.1**	-0.2

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
Gold Coast	6,710,000	-9.3%	$716.3m	0.1%
Queensland	34,662,000	-10.3%	$4,059.9m	-7.3%
Australia	**165,237,000**	**-1.6%**	**$18,230.9m**	**0.9%**

The number of day trips continued to decline at both a national and State level in the year to June 2014. Whilst national figures suggest only a marginal reduction, day trips in Queensland appear to be decreasing more severely. This may be the result of more overnight or international trips, or the time constraints and costs associated with daytripping, such as petrol and other travel costs.

Key domestic source markets to Gold Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	1,107,000	8.8%	2,941,000	21.2%
Regional Qld	676,000	-7.3%	2,167,000	2.4%
Sydney	522,000	-20.3%	2,429,000	-27.0%
Regional NSW	455,000	-3.2%	1,905,000	0.8%
Melbourne	449,000	18.8%	2,570,000	8.9%
Regional Vic	n/p	▼	n/p	▼

State Comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	18,073,000	0.6%	76,106,000	1.1%
NSW	26,549,000	6.1%	86,747,000	2.7%
Victoria	19,635,000	9.5%	59,961,000	6.8%
Australia	**79,096,000**	**5.1%**	**294,980,000**	**3.1%**
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	7,625,000	-2.4%	34,519,000	-8.0%
NSW	10,894,000	2.6%	38,480,000	-5.1%
Victoria	8,819,000	7.4%	30,000,000	10.2%
Australia	**33,329,000**	**2.1%**	**132,225,000**	**-2.1%**

The number of domestic holiday nights spent in Australia declined on average in the year to June 2014, with both Queensland and New South Wales recording fewer holiday nights. In contrast to this, holiday nights in Victoria increased.

Gold Coast Regional Snapshot

Tourism and Events Queensland

International visitation Year Ending June 2014

International Visitors to Gold Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	641,000	9.1%	4,093,000	12.7%	6.4	0.2
VFR	127,000	-1.9%	1,807,000	-0.8%	14.3	0.2
Business	27,000	-23.3%	172,000	-27.4%	6.4	-0.4
Total[3]	**810,000**	**5%**	**8,420,000**	**12%**	**10.4**	**0.6**

State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,065,000	1.1%	45,589,000	-2.4%
NSW	3,112,000	6.6%	74,827,000	6.6%
Victoria	2,049,000	10.9%	47,425,000	0.8%
Australia	**6,058,000**	**7.3%**	**215,391,000**	**0.6%**
Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,411,000	2.6%	19,659,000	-3.1%
NSW	1,739,000	7.2%	23,803,000	6.2%
Victoria	1,044,000	14.8%	11,492,000	-1.4%
Total	**3,221,000**	**8.9%**	**70,190,000**	**-1.0%**

Top 10 international source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
China	187,000	4.2%	960,000	15.3%
NZ	185,000	8.9%	1,688,000	-8.3%
UK	60,000	3.0%	720,000	8.9%
Japan	56,000	3.3%	667,000	9.8%
Singapore	42,000	3.0%	259,000	20.0%
Malaysia	31,000	40.4%	195,000	16.4%
USA	28,000	13.1%	224,000	-25.5%
India	22,000	28.4%	252,000	76.8%
Hong Kong	20,000	15.2%	246,000	n/p
Korea	19,000	-36.8%	347,000	-8.3%

These are the Top 10 source markets for this period, ranked using total visitor numbers. Some markets may have been added to create natural groups such as 'Asia' and 'Europe' to provide a more complete picture. For technical reasons, some data may not be published, however the markets will still appear in order.

Holiday	Visitors	Year % Chg	Nights	Year % Chg
China	178,000	6.5%	470,000	23.8%
NZ	116,000	18.0%	998,000	0.8%
Japan	44,000	4.7%	444,000	18.9%
UK	44,000	5.9%	286,000	6.6%
Singapore	37,000	1.7%	184,000	3.2%
Malaysia	26,000	34.3%	134,000	31.2%
USA	20,000	35.9%	99,000	-2.1%
India	20,000	42.3%	65,000	37.1%
Hong Kong	18,000	34.8%	141,000	n/p
Korea	17,000	-38.5%	208,000	-23.1%

The Top 10 Holiday Visitor markets are similar to the Total Visitor markets above, however they are ranked using holiday visitor numbers. The same grouping and limitation of data applies.

The average length of stay of international holidaymakers in Queensland was 13.9 nights in the year to June 2014. This result was more than both New South Wales (13.7 nights) and Victoria (11 nights). All three of these results respresent a decrease in the average length of stay of international holidaymakers in Australia.

Regional Snapshots for all Queensland regions are available on the TEQ Research website, www.teq.queensland.com

Overview snapshots are also available for both Domestic and International visitors.

Any questions or comments, please email research@queensland.com

The Gold Coast tourism region aligns with the ABS region.

Regional Comparison

Tourism and Events Queensland

Year Ending June 2014

Domestic Regional Comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
							% Proportion of Travel Purpose			
Brisbane	5,156,000	1.0%	15,929,000	3.7%	3.1	0.1	28%	43%	20%	29%
Gold Coast	**3,536,000**	**-3.5%**	**14,043,000**	**-5.1%**	**4.0**	**0.0**	**62%**	**27%**	**9%**	**20%**
Sunshine Coast	2,808,000	4.6%	10,538,000	-4.0%	3.8	-0.3	56%	34%	6%	16%
Fraser Coast	531,000	-2.7%	2,349,000	18.8%	4.4	0.8	51%	34%	9%	3%
Southern Qld Country[8]	1,778,000	-2.8%	5,513,000	-5.6%	3.1	-0.1	30%	36%	28%	10%
Southern GBR	1,670,000	-2.4%	6,237,000	-8.6%	3.7	-0.3	31%	32%	30%	9%
Mackay	674,000	-9.9%	2,791,000	16.2%	4.1	0.9	20%	27%	51%	4%
Whitsundays	495,000	4.7%	2,049,000	-4.3%	4.1	-0.4	63%	26%	9%	3%
Townsville	936,000	5.4%	3,760,000	-2.1%	4.0	-0.3	35%	38%	21%	5%
Outback	366,000	n/p	1,966,000	n/p	5.4	n/p	42%	17%	37%	2%
TNQ	1,626,000	-1.2%	8,739,000	8.7%	5.4	0.5	56%	24%	19%	9%
Total Domestic	**18,073,000**	**0.6%**	**76,106,000**	**1.1%**	**4.2**	**0.0**	**42%**	**35%**	**19%**	**-**

International Regional Comparison

Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	Holiday %	VFR %	Business %	% Share of Total Visitors
							% Proportion of Travel Purpose			
Brisbane	967,000	-1.5%	19,948,000	-4.7%	20.6	-0.7	51%	30%	11%	47%
Gold Coast	**810,000**	**5.5%**	**8,420,000**	**11.7%**	**10.4**	**0.6**	**79%**	**16%**	**3%**	**39%**
Sunshine Coast	231,000	1.8%	2,687,000	8.0%	11.7	0.7	76%	20%	3%	11%
Fraser Coast	117,000	-1.5%	482,000	-30.8%	4.1	-1.8	95%	4%	1%	6%
Southern Qld Country[8]	48,000	1.1%	1,595,000	4.8%	33.0	1.2	38%	27%	11%	2%
Southern GBR	123,000	-7.9%	2,322,000	7.2%	18.9	2.7	74%	13%	5%	6%
Mackay	45,000	0.0%	710,000	-6.9%	15.8	-1.2	64%	26%	6%	2%
Whitsundays	189,000	2.1%	1,342,000	1.4%	7.1	-0.1	96%	3%	0%	9%
Townsville	96,000	-15.5%	1,213,000	-30.0%	12.6	-2.6	78%	15%	4%	5%
Outback	18,000	n/p	386,000	n/p	21.1	n/p	72%	13%	7%	1%
TNQ	689,000	-2.4%	6,175,000	-0.4%	9.0	0.2	92%	5%	2%	33%
Total International	**2,065,000**	**1.1%**	**45,589,000**	**-2.4%**	**22.1**	**-0.8**	**68%**	**25%**	**8%**	**-**

Notes/Sources:

In 2012, the ABS changed the way it reports regional statistics. Essentially, the ABS moved from using political boundaries such as local government areas to a framework based on population densities, called the ASGS (Australian Statistical Geographic Standard). SA2's (Statistical Area 2) which represent one level of the ASGS replace local government areas (LGA) previously used to define tourism region boundaries. SA2 boundaries closely resemble that of the former tourism region boundaries (defined by LGA boundaries) in Queensland with any differences not being material.

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.

Two letter IATA Country Codes have been used to keep data entry concise. A list of those used appears below.
CN - China; DE - Germany; JN - Japan; UK - United Kingdom; EU - Europe

'n/p' indicates the data has not been published.

Footnotes:

1. Annual change refers to the percentage change between the year to the date covered by this report compared to the same period one year prior.
2. Trend change refers to the percentage change between the average of the three years to the date covered by this report, compared to the average for the same period one year prior.
3. This figure includes "Other" visitors.