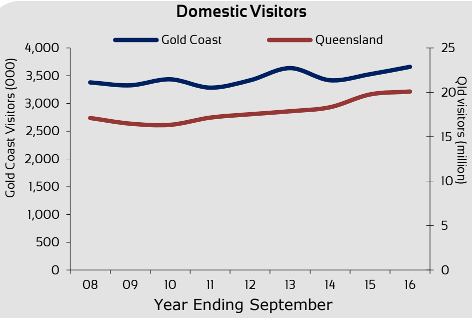
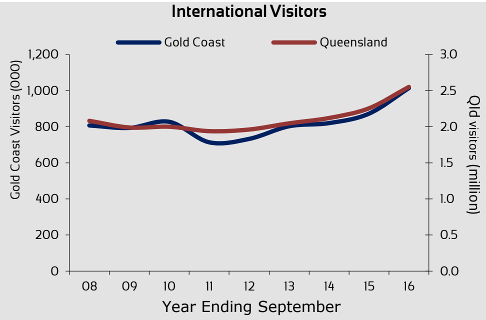
Gold Coast Regional Snapshot

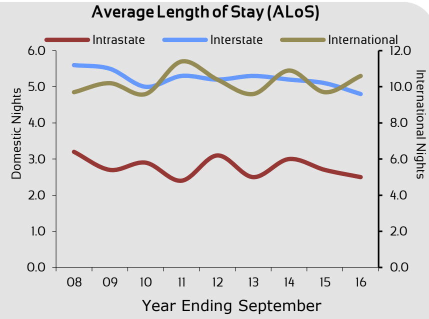
Tourism and Events Queensland

Year Ending September 2016

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	3,660,000	1,945,000	1,222,000	370,000	$3,002.02
Annual % change[1]	▲ 3.8%	▲ 4.5%	▲ 5.0%	▼ -5.9%	▲ 6.5%
Trend % change[2]	● 0.2%	▼ -3.7%	▲ 6.6%	● -0.1%	▼ -1.7%
International Overnight	1,014,000	807,000	141,000	34,000	$1,276.2m
Annual % change	▲ 16.2%	▲ 17.5%	▲ 3.7%	▲ 21.9%	▲ 15.0%
Trend % change	▲ 8.5%	▲ 9.2%	▲ 3.7%	● 0.1%	▲ 12.4%
TOTAL	**4,674,000**	**2,752,000**	**1,363,000**	**404,000**	**$4,278.2m**
Annual change	▲ 6.2%	▲ 8.0%	▲ 4.8%	▼ -4.0%	▲ 8.9%







Domestic Visitation

▪ Domestic overnight visitors to the Gold Coast region increased 3.8% in the year ending September 2016, visiting friends and relatives (VFR) saw 5.0% growth while holiday visitors grew by 4.5%. These increases were off-set somewhat by a 5.9% decrease in business visitors. Holiday visitors still made up the bulk of visitors to the region with 53.1% market share.

▪ Interstate travel to the Gold Coast increased by 8.1% driven by growth in holiday visitors (up 15.7%). Interstate holiday visitors represented 56.3% of domestic overnight visitors to the Gold Coast. Interstate VFR increased by 6.5%, while business travel decreased by 15.8%.

▪ Intrastate visitation to the Gold Coast was relatively stable (-0.2% change) driven by a decline in intrastate holiday travel (down 5.6%), which was offset by an increase in VFR (up 4.3%) and business travel (up 15.0%). The decline in intrastate holiday travel to the Gold Coast was mainly driven by regional Queensland, which was down 10.3% year on year. Holiday travel made up 50.1% of intrastate visitation to the Gold Coast.

▪ Domestically, visitor nights decreased slightly (down 1.5%), resulting in a slight decline in the average length of stay (ALoS) by 0.2 of a night.

▪ Despite the stability in domestic visitor nights, domestic overnight expenditure in the Gold Coast grew by 6.5% to $3.0 billion, driven by the growth in total domestic visitors.

International Visitation

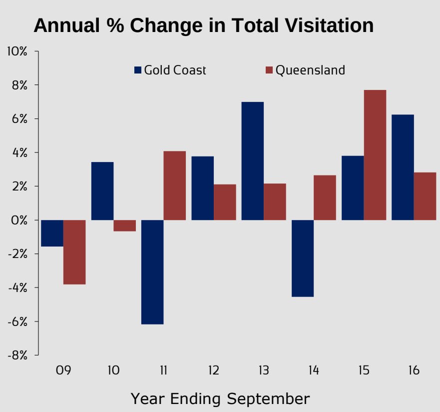
▪ The number of international visitors travelling to the Gold Coast increased 16.2% in the year ending September 2016 to a record high 1.01 million. Holiday visitors dominated international travel with a 79.6% share and growth over the year of 17.5%, reaching a record high 807,000. There was also good growth across all other travel purposes.

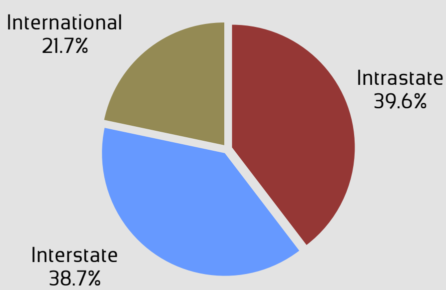
▪ The Gold Coast was the most popular destination in the State amongst Chinese travellers, welcoming 295,000 visitors, up 38.4%. China is the region's largest international source market with 29.1% share. Overall, nights for Chinese visitors increased 61.5% which resulted in an increase in the average length of stay from 4.7 nights to 5.4.

▪ New Zealand remained the number two international source market for the Gold Coast with a 19.3% share and a 2.1% increase in visitation. The United Kingdom remained the third largest source market for the Gold Coast with 6.9% share, which represented growth of 5.8%. The Japanese market continued its upward trend with growth of 6.2%, while visitation from the USA grew by 21.7%. There was also strong growth from Asian countries other than China and Japan (23.5%).

▪ International visitor nights on the Gold Coast increased by 26.7%, pushing up international visitors ALoS by 9.3% to 10.6 nights.

▪ The increase in visitation, combined with the slightly longer ALoS resulted in a 15.0% increase in international overnight visitor expenditure for the Gold Coast region, reaching a record high $1.3.billion.





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 September 2016

Domestic Visitors to Gold Coast

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	1,945,000	4.5%	8,080,000	4.4%	4.2	0.0
VFR	1,222,000	5.0%	3,682,000	-7.5%	3.0	-0.4
Business	370,000	-5.9%	1,216,000	-9.8%	3.3	-0.1
Domestic[3]	**3,660,000**	3.8%	**13,326,000**	-1.5%	**3.6**	-0.2
Intrastate						
Holiday	927,000	-5.6%	2,772,000	2.7%	3.0	0.3
VFR	728,000	4.3%	1,448,000	-9.2%	2.0	-0.3
Business	146,000	15.0%	353,000	-28.0%	2.4	-1.5
Intrastate	**1,852,000**	-0.2%	**4,706,000**	-5.8%	**2.5**	-0.2
Interstate						
Holiday	1,018,000	15.7%	5,307,000	5.3%	5.2	-0.5
VFR	495,000	6.5%	2,234,000	-6.4%	4.5	-0.6
Business	224,000	-15.8%	864,000	0.7%	3.9	0.7
Interstate	**1,808,000**	8.1%	**8,620,000**	1.0%	**4.8**	-0.3

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
Gold Coast	8,497,000	11.2%	$818.3m	18.0%
Queensland	40,526,000	10.5%	$4,330.8m	5.4%
Australia	**187,735,000**	**7.4%**	**$19,329.1m**	**1.5%**

On a national level, daytrip visitation increased 7.4% to 187.7 million visitors in the year ending September 2016. By comparison, daytrips in Queensland increased 10.5%, Victoria increased 7.4%, while New South Wales increased 3.7%.

Key domestic source markets to Gold Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	1,244,000	2.6%	2,864,000	2.8%
Regional Qld	609,000	-5.1%	1,842,000	-16.7%
Sydney	606,000	9.2%	2,558,000	-1.6%
Regional NSW	453,000	19.8%	1,630,000	1.7%
Melbourne	371,000	-3.9%	2,384,000	6.3%
Regional Vic	133,000	58.3%	724,000	42.0%

State Comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	20,091,000	1.6%	79,489,000	-1.5%
NSW	29,069,000	4.5%	94,129,000	4.4%
Victoria	21,671,000	2.3%	64,031,000	1.9%
Australia	**89,447,000**	**4.8%**	**330,074,000**	**3.7%**
Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,128,000	7.7%	36,363,000	9.4%
NSW	11,850,000	8.0%	42,405,000	9.7%
Victoria	9,680,000	6.9%	29,824,000	6.5%
Australia	**36,871,000**	**8.2%**	**143,977,000**	**9.3%**

Total domestic overnight visitation continued to increase across all states in the year ending September 2016, which lead to national growth in domestic travel.

Gold Coast Regional Snapshot

Tourism and Events Queensland

International visitation Year Ending September 2016

International Visitors to Gold Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	807,000	17.5%	5,094,000	25.7%	6.3	0.4
VFR	141,000	3.7%	2,473,000	33.7%	17.6	4.0
Business	34,000	21.9%	297,000	70.0%	8.8	2.5
Total[3]	**1,014,000**	**16.2%**	**10,722,000**	**26.7%**	**10.6**	**0.9**

State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,551,000	13.1%	53,087,000	5.0%
NSW	3,760,000	12.6%	87,071,000	5.6%
Victoria	2,630,000	13.3%	59,927,000	3.9%
Australia	**7,348,000**	**11.7%**	**250,402,000**	**3.8%**
Holiday Visitors	Visitors	Year % Chg	Nights	Annual % Change
Queensland	1,779,000	17.0%	22,720,000	10.0%
NSW	2,220,000	17.6%	26,687,000	9.5%
Victoria	1,458,000	20.7%	14,824,000	9.3%
Total	**4,142,000**	**18.1%**	**80,415,000**	**8.0%**

Top 10 international source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
China	295,000	38.4%	1,604,000	61.5%
NZ	195,000	2.1%	1,778,000	19.5%
UK	70,000	5.8%	740,000	-11.6%
Japan	56,000	6.2%	953,000	15.8%
USA	38,000	21.7%	663,000	84.1%
Singapore	37,000	10.2%	201,000	10.6%
Taiwan	34,000	36.6%	324,000	-16.9%
Hong Kong	31,000	60.0%	212,000	-11.9%
Korea	31,000	33.0%	852,000	210.4%
India	27,000	24.4%	160,000	-19.4%

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	277,000	38.8%	685,000	40.2%
NZ	120,000	0.0%	1,048,000	20.8%
UK	50,000	3.2%	288,000	-17.5%
Japan	42,000	11.9%	577,000	11.3%
Singapore	35,000	14.3%	179,000	24.5%
Taiwan	29,000	33.3%	190,000	-16.7%
Hong Kong	27,000	81.0%	100,000	40.0%
Korea	25,000	23.5%	288,000	89.0%
USA	24,000	12.7%	265,000	161.5%
India	24,000	23.8%	77,000	27.8%

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 12.8 nights in the year ending September 2016. This result was more than both New South Wales (12.0 nights) and Victoria (10.2 nights). This represents a year on year decline of approximately 1 night in the average stay of international holiday travellers for Queensland, New South Wales and Victoria.

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

Year Ending September 2016

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	5,815,000	5.3%	17,388,000	-0.8%	3.0	-0.2	28%	40%	24%	29%
Gold Coast	**3,660,000**	**3.8%**	**13,326,000**	**-1.5%**	**3.6**	**-0.2**	**53%**	**33%**	**10%**	**18%**
Sunshine Coast	3,250,000	13.5%	11,757,000	7.7%	3.6	-0.2	59%	32%	6%	16%
Fraser Coast	597,000	-4.3%	2,271,000	-9.2%	3.8	-0.2	51%	38%	7%	3%
Southern Qld Country	1,912,000	-4.2%	5,151,000	-14.9%	2.7	-0.3	29%	39%	24%	10%
Southern GBR	1,932,000	-0.3%	7,739,000	-0.1%	4.0	0.0	30%	30%	32%	10%
Mackay	733,000	-16.8%	2,767,000	-12.4%	3.8	0.2	21%	22%	49%	4%
Whitsundays	516,000	25.5%	2,199,000	-1.3%	4.3	-1.1	65%	19%	10%	3%
Townsville	1,131,000	11.2%	4,201,000	4.2%	3.7	-0.3	31%	31%	25%	6%
Outback	519,000	n/p	2,321,000	n/p	4.5	n/p	44%	22%	27%	3%
TNQ	1,875,000	-7.3%	9,384,000	-4.4%	5.0	0.1	50%	22%	24%	9%
Total Domestic	**20,091,000**	**1.6%**	**79,489,000**	**-1.5%**	**4.0**	**-0.1**	**40%**	**34%**	**21%**	**-**

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	1,183,000	9.6%	24,735,000	4.2%	20.9	-1.1	53%	29%	9%	46%
Gold Coast	**1,014,000**	**16.2%**	**10,722,000**	**26.7%**	**10.6**	**0.9**	**80%**	**14%**	**3%**	**40%**
Sunshine Coast	272,000	6.4%	2,983,000	21.3%	11.0	1.4	79%	19%	2%	11%
Fraser Coast	136,000	3.8%	657,000	17.2%	4.8	0.5	93%	5%	1%	5%
Southern Qld Country	44,000	-13.0%	1,350,000	-17.7%	30.6	-1.8	43%	32%	10%	2%
Southern GBR	133,000	-6.3%	2,209,000	-16.8%	16.7	-2.1	78%	14%	4%	5%
Mackay	43,000	2.7%	461,000	-35.0%	10.7	-6.2	71%	15%	6%	2%
Whitsundays	229,000	9.6%	1,513,000	3.0%	6.6	-0.4	97%	1%	1%	9%
Townsville	125,000	2.1%	1,624,000	4.7%	13.0	0.3	77%	14%	4%	5%
Outback	20,000	n/p	217,000	n/p	10.6	n/p	78%	9%	10%	1%
TNQ	877,000	16.0%	6,613,000	-4.1%	7.5	-1.6	93%	4%	2%	34%
Total International	**2,551,000**	**13.1%**	**53,087,000**	**5.0%**	**20.8**	**-1.6**	**70%**	**23%**	**6%**	**-**

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.

'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.