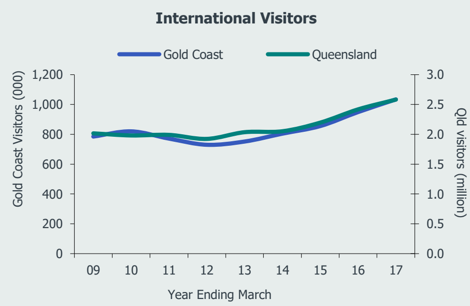
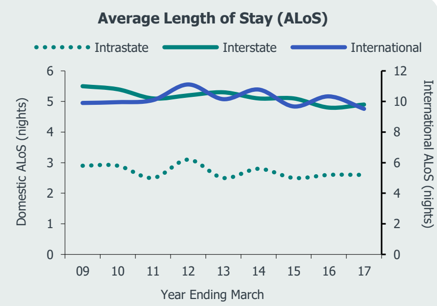
Gold Coast Regional Snapshot

Year Ending March 2017

	Visitors	Holiday	VFR	Business	Expenditure ($m)
Domestic Overnight	**3,908,000**	**2,079,000**	**1,314,000**	**387,000**	**$3,068.0m**
Annual % change[1]	▲ 7.5%	▲ 2.9%	▲ 14.9%	▲ 10.1%	▲ 3.5%
3yr trend % change[2]	▲ 3.7%	▼ -0.6%	▲ 8.5%	▲ 5.9%	▼ -0.5%
International Overnight	**1,034,000**	**819,000**	**151,000**	**37,000**	**$1,213.1m**
Annual % change	▲ 9.0%	▲ 9.0%	▲ 7.0%	▲ 32.0%	● -0.3%
3yr trend % change	▲ 8.8%	▲ 8.9%	▲ 7.1%	▲ 8.0%	▲ 7.9%
TOTAL	**4,943,000**	**2,898,000**	**1,465,000**	**423,000**	**$4,281.2m**
Annual % change	▲ 7.8%	▲ 4.6%	▲ 14.0%	▲ 11.7%	▲ 2.4%
3yr trend % change	▲ 4.7%	▲ 1.9%	▲ 8.3%	▲ 6.0%	▲ 1.7%





Domestic Visitors

▪ In the year ending March 2017, the Gold Coast region saw record high domestic overnight visitation with 3.9 million visitors to the region (up 7.5% year on year).

▪ The domestic market accounted for 79% of total overnight visitation and 72% of total overnight expenditure in the region.

▪ The Gold Coast experienced visitation growth from both the intrastate market (up 10.1% to 2.1 million) and the interstate market (up 4.8% to 1.8 million). Interstate growth was led by regional Victoria and regional New South Wales, whereas visitation has decreased among Sydney-siders.

▪ All purposes of travel saw growth year on year. Visiting friends and relatives (VFR) grew strongly (up 14.9%), followed by business visitation (up 10.1%), and holiday (up 2.9%). The strong growth in VFR visitation in the year ending March 2017 came predominately from Brisbane residents (up 25.9%).

▪ The increase in visitor numbers and stable average length of stay (ALoS) (3.7 nights) saw growth in domestic overnight expenditure in the region, up 3.5% to $3.1 billion. Stable ALoS also resulted in visitor nights growing in line with visitation, up 7.3% to 14.3 million nights.

International Visitors

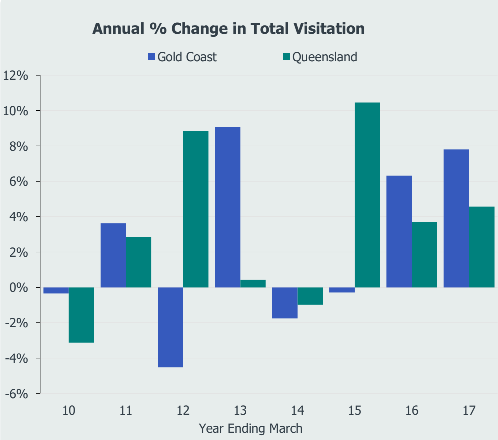
▪ The Gold Coast continued to experience strong growth in international visitation in the year ending March 2017, welcoming a record 1.0 million visitors (up 9.0% year on year).

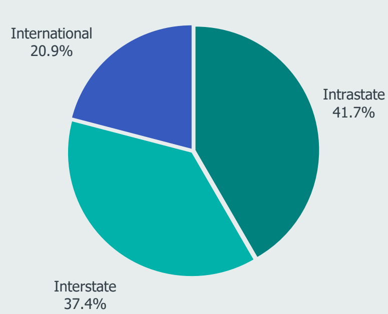
▪ The Gold Coast was the most popular destination in Queensland among Chinese visitors, Queensland's largest international source market. With 295,000 visitors (up 9.5%), China also remained the Gold Coast's largest international source market in terms of visitation.

▪ Three of the region's top five source markets, NZ, Japan and the USA, saw double-digit growth in visitation and nights in the year ending March 2017. When looking at holiday visitation, Taiwan joins the top five source markets in place of the USA and has experienced double-digit holiday growth this period.

▪ Nearly eight in ten (79%) international visitors to the Gold Coast are holiday visitors. Holiday visitation grew 9.0% in the year ending March 2017. This underpins the strong growth in international visitation for the region.

▪ Visitors ALoS decreased by 0.8 nights year on year. However, due to the strong growth in visitation, visitor nights were stable overall (up 0.4%). This resulted in stable overnight visitor expenditure (down 0.3%) of $1.2 billion in the year ending March 2017.





Research Updates

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

Gold Coast Regional Snapshot

Domestic visitation Year Ending March 2017

Domestic Visitors to Gold Coast

	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	2,079,000	2.9%	8,657,000	5.6%	4.2	0.1
VFR	1,314,000	14.9%	3,955,000	16.5%	3.0	0.0
Business	387,000	10.1%	1,079,000	-19.3%	2.8	-1.0
Domestic[3]	**3,908,000**	7.5%	**14,276,000**	7.3%	**3.7**	0.0
Intrastate						
Holiday	1,053,000	3.8%	3,212,000	7.4%	3.0	0.1
VFR	771,000	16.5%	1,445,000	9.1%	1.9	-0.1
Business	177,000	26.3%	451,000	14.1%	2.5	-0.3
Intrastate	**2,059,000**	10.1%	**5,265,000**	7.9%	**2.6**	0.0
Interstate						
Holiday	1,026,000	2.0%	5,445,000	4.6%	5.3	0.1
VFR	543,000	12.7%	2,510,000	21.2%	4.6	0.3
Business	210,000	-0.7%	628,000	-33.3%	3.0	-1.5
Interstate	**1,849,000**	4.8%	**9,012,000**	6.9%	**4.9**	0.1

Domestic day trip visitors

Total Visitors	Day trip visitors	Year % Chg	Expenditure ($) million	Year % Chg
Gold Coast	8,310,000	-0.4%	$811.8m	-3.1%
Queensland	39,959,000	-1.5%	$4,344.7m	1.4%
Australia	**186,964,000**	**1.2%**	**$19,583.4m**	**4.0%**

Key domestic source markets to Gold Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Brisbane	1,368,000	8.9%	3,017,000	-3.3%
Regional Qld	691,000	12.5%	2,248,000	27.6%
Sydney	539,000	-12.7%	2,257,000	-17.1%
Regional NSW	513,000	22.5%	2,090,000	25.6%
Melbourne	368,000	0.8%	2,313,000	14.6%
Regional Vic	159,000	75.4%	787,000	46.5%

State Comparison - Domestic

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	21,234,000	4.3%	83,176,000	5.0%
NSW	29,412,000	4.0%	96,459,000	6.6%
Victoria	22,542,000	6.2%	65,405,000	5.2%
Australia	**91,683,000**	**3.1%**	**335,481,000**	**3.8%**

Holiday Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	8,163,000	-1.5%	36,566,000	1.4%
NSW	11,642,000	-0.9%	40,042,000	-3.2%
Victoria	9,798,000	2.1%	29,943,000	2.0%
Australia	**37,035,000**	**0.5%**	**142,861,000**	**0.5%**

Gold Coast Regional Snapshot

International visitation Year Ending March 2017

International Visitors to Gold Coast

All Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of Stay	Year # Chg
Holiday	819,000	9.0%	4,895,000	10.1%	6.0	0.1
VFR	151,000	7.0%	2,006,000	-18.7%	13.3	-4.2
Business	37,000	32.0%	309,000	132.5%	8.4	3.6
Total[3]	**1,034,000**	**9.0%**	**9,845,000**	**0.4%**	**9.5**	**-0.8**

State Comparison - International

All Visitors	Visitors	Year % Chg	Nights	Year % Chg
Queensland	2,583,000	6.8%	53,469,000	3.2%
NSW	3,913,000	9.8%	89,932,000	3.5%
Victoria	2,707,000	7.7%	66,631,000	13.1%
Australia	**7,617,000**	**9.1%**	**261,205,000**	**5.4%**
Holiday Visitors	**Visitors**	**Year % Chg**	**Nights**	**Annual % Change**
Queensland	1,798,000	8.3%	23,082,000	5.8%
NSW	2,289,000	10.0%	27,361,000	5.8%
Victoria	1,492,000	9.2%	16,059,000	8.6%
Total	**4,278,000**	**11.0%**	**82,600,000**	**5.9%**

Top 10 source markets

Total	Visitors	Year % Chg	Nights	Year % Chg
China	295,000	9.5%	1,514,000	2.5%
NZ	209,000	10.6%	1,859,000	18.2%
UK	67,000	-2.5%	827,000	18.3%
Japan	66,000	18.4%	1,052,000	18.0%
USA	39,000	14.1%	535,000	27.0%
Taiwan	33,000	13.2%	264,000	-38.8%
Singapore	32,000	-5.5%	178,000	-4.0%
Korea	32,000	40.6%	458,000	-23.7%
Hong Kong	27,000	-2.7%	218,000	-14.4%
Germany	27,000	4.6%	230,000	-16.7%

For technical reasons, some data may not be publishable (n/p), however the markets will still appear in order.

Top 10 holiday source markets

Holiday	Visitors	Year % Chg	Nights	Year % Chg
China	274,000	8.4%	659,000	4.3%
NZ	125,000	6.2%	917,000	-4.1%
Japan	50,000	24.3%	750,000	38.5%
UK	48,000	-5.1%	332,000	10.2%
Taiwan	30,000	20.4%	214,000	8.1%
Singapore	30,000	-2.1%	151,000	2.5%
Korea	27,000	43.1%	263,000	120.8%
USA	27,000	12.9%	253,000	71.9%
Germany	24,000	3.5%	138,000	-19.4%
Hong Kong	23,000	2.7%	110,000	39.3%

Regional snapshots for all Queensland regions are available on the TEQ Research website. Overview snapshots are also available for both Domestic and International visitors. www.teq.queensland.com.

If you have any questions or comments, please email research@queensland.com.

The tourism regions are defined by the Australian Bureau of Statistics (ABS) as a collection of Statistical Area Level 2s (SA2), please refer to the interactive map at http://stat.abs.gov.au/itt/r.jsp?ABSMaps

Regional Comparison

Year Ending March 2017

Domestic Regional Comparison

Total Visitors	Visitors	Year % Chg	Nights	Year % Chg	Length of stay	Nights change	% Proportion of Travel Purpose: Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	6,249,000	9.3%	18,053,000	3.8%	2.9	-0.1	25%	41%	25%	29%
Gold Coast	**3,908,000**	**7.5%**	**14,276,000**	**7.3%**	**3.7**	**0.0**	**53%**	**34%**	**10%**	**18%**
Sunshine Coast	3,436,000	6.0%	12,475,000	7.6%	3.6	0.0	55%	35%	7%	16%
Fraser Coast	595,000	-2.3%	2,439,000	7.1%	4.1	0.1	48%	36%	14%	3%
Southern Qld Country	1,898,000	3.1%	5,682,000	15.7%	3.0	0.3	28%	38%	25%	9%
SGBR	1,950,000	-1.6%	7,719,000	1.6%	4.0	0.2	33%	31%	27%	9%
Mackay	878,000	7.0%	3,234,000	19.6%	3.7	0.4	20%	24%	48%	4%
Whitsundays	477,000	-2.9%	2,357,000	10.3%	4.9	0.5	65%	20%	13%	2%
Townsville	1,115,000	-8.9%	3,846,000	-9.0%	3.5	0.0	31%	27%	30%	5%
Outback	806,000	n/p	2,897,000	n/p	3.6	n/p	34%	18%	39%	4%
TNQ	1,801,000	-6.9%	9,159,000	-0.7%	5.1	0.3	49%	23%	25%	8%
Total Domestic	**21,234,000**	**4.3%**	**83,176,000**	**5.0%**	**3.9**	**0.0**	**38%**	**35%**	**22%**	**-**

International Regional Comparison

Total Visitors	Visitors	Annual % change	Nights	Annual % change	Length of stay	Nights change	% Proportion of Travel Purpose: Holiday %	VFR %	Business %	% Share of Total Visitors
Brisbane	1,206,000	4.9%	26,079,000	9.0%	21.6	0.8	54%	29%	9%	47%
Gold Coast	**1,034,000**	**9.0%**	**9,845,000**	**0.4%**	**9.5**	**-0.8**	**79%**	**15%**	**4%**	**40%**
Sunshine Coast	288,000	11.6%	2,754,000	-3.9%	9.5	-1.5	80%	17%	2%	11%
Fraser Coast	151,000	15.1%	703,000	28.8%	4.7	0.5	93%	6%	1%	6%
Southern Qld Country	42,000	-3.5%	1,251,000	-20.6%	29.9	-6.4	41%	38%	10%	2%
SGBR	143,000	1.8%	2,233,000	-14.9%	15.6	-3.1	79%	12%	4%	6%
Mackay	48,000	13.6%	464,000	-20.0%	9.6	-4.0	74%	14%	7%	2%
Whitsundays	243,000	10.5%	1,458,000	4.8%	6.0	-0.3	97%	2%	0%	9%
Townsville	130,000	6.1%	1,532,000	-7.8%	11.8	-1.8	81%	12%	3%	5%
Outback	25,000	n/p	412,000	n/p	16.8	n/p	76%	11%	5%	1%
TNQ	890,000	7.2%	6,740,000	6.2%	7.6	-0.1	92%	4%	2%	34%
Total International	**2,583,000**	**6.8%**	**53,469,000**	**3.2%**	**20.7**	**-0.7**	**70%**	**23%**	**7%**	**-**

Notes/Sources:

In 2012, the Australian Bureau of Statistics (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 (TRA). 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.

In 2014 TRA moved to a new methodology for the National Visitor Survey (NVS) that included mobile phone interviewing as part of a dual frame overlap survey. This initiative was part of TRA's continuous improvement program. The inclusion of mobile phone users ultimately delivers greater domestic tourism data accuracy. Advancements in the quality of mobile telephone data sets which, were implemented in the NVS build process in late 2015 caused anomalies in the growth rate of some components. This has required back-casting to align the data and allow for the continuation of the time series. Moving forward, the quality of data that the NVS produces will be more accurate as it better reflects the Australian resident population and phone ownership.

The back-cast results have seen a change in volume estimates in 2014 and 2015. Results for other years have not been affected. The average growth rate over the five-year trend has not changed. However, due to the volume changes in 2014 and 2015, growth rates previously published will, in most cases, be reduced in line with the long-term trend.

Please visit tra.gov.au for more information on the back-casting process and impact on results.

'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.