Gold Coast Tourism Industry Report

Year Ending December 2014

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Dr Char-lee McLennan
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Griffith Institute for Tourism Research Report Series
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About this report:

This Gold Coast 2014 Calendar-Year Tourism Industry Report provides a consistent collation and analysis of macro and micro tourism statistics, research, and trends.

The ongoing bi-annual series of Gold Coast Financial-Year and Full-Year Tourism Industry Reports are commissioned by the Gold Coast Tourism Corporation and the City of Gold Coast, and prepared independently by the Griffith Institute for Tourism.

These Reports are produced for, and provided to, the Gold Coast tourism industry and general public as a reliable source of tourism intelligence.

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Disclaimer:

In January 2014, Tourism Research Australia (TRA) introduced mobile phone interviewing on the National Visitor Survey to supplement existing residential fixed line interviewing in order to provide better coverage of the Australian population. This has resulted in a break in series because the travel patterns of people interviewed on mobile phones differ from those of people interviewed on residential fixed lines. Consequently, readers of this report are advised that the domestic visitor results should be interpreted with caution. For further information please refer to: http://www.tra.gov.au/Fact-sheet-2014-Updates-to-the-IVS-NVS.html

Note: The International and National Visitor Surveys are conducted separately with their own methodologies; therefore care should be taken when considering their combined results.

Organisations involved

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About Griffith University

Griffith University is a top ranking University based in South East Queensland, Australia. Griffith University hosts the Griffith Institute for Tourism, a world-leading institute for quality research into tourism. Through its activities and an external Advisory Board, the Institute links university-based researchers with the business sector and organisations, as well as local, state and federal government bodies. For more information, visit www.griffith.edu.au/griffith-institute-tourism .

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Tourism on the Gold Coast – Key Highlights for the year ending December 2014

- International visitation to the Gold Coast increased by 7%, mainly driven by holiday visitors.
- Expenditure by international visitors in 2014 increased by 11%.
- Business confidence in tourism remains high.
- Hotel revenue increased by 9%; more than twice as much than the Australian average growth.
- Gold Coast ranks as Australia's No. 4 region in terms of domestic overnight visitors expenditure.

1. Executive Summary

For the year ending December 2014:

Total Overnight Visitation ➡ 0%	In the year ending December 2014, total international and domestic overnight visitation to the Gold Coast was steady with no change in the number of total overnight visitors. There were 4,282,000 overnight visitors to the Gold Coast during the period, of which 20% were international visitors.
Average Length of Stay ⬆ 0.1 night	Average length of stay by total international and domestic overnight visitors on the Gold Coast improved very slightly, up 0.1 nights to 5.3 nights.
Total Visitor Expenditure ⬇ 3%	Total visitor expenditure to the Gold Coast decreased 3%, a result of declining spend by the domestic overnight and day trip markets.
Domestic Overnight Visitation ⬇ 2%	The domestic overnight visitation to the Gold Coast softened by 2%, with their expenditure down 3%. Holiday visitation to the Gold Coast was the main source of the declines in visitation, down 5% from the previous year. In contrast, those visiting friends and relatives increased 5%, suggesting some substitution may be occurring.
Domestic Daytrip Visitation ⬆ 1%	Daytrip visitation to the Gold Coast was stable, although daytrip expenditure declined by 21%; a result driven by a decline in per visitor expenditure.
International Visitation ⬆ 7%	International visitors to the Gold Coast increased 7%, with international nights up 10%. A 2% growth in expenditure per night, combined with increases in visitation and length of stay drove an overall increase of 13% in international visitors' expenditure in the region. Recent growth in the international market has been primarily from holiday visitors (up 7% or 42,000 visitors).
Key Source Markets	The Gold Coast's key international source market continues to be China, followed closely by New Zealand. China has had good growth during the period, recording the largest increase in

China New Zealand	visitor numbers (up 8% or 15,000 visitors). Likewise, the New Zealand market has rebounded strongly, up 8% (or 14,000 visitors).
Gold Coast Airport Passenger Movements 1.3%	Total passenger movements at Gold Coast Airport (OOL) increased slightly by 1.3%. Comparatively, total passenger movements at Brisbane Airport (BNE) increased by 1.6% for the year.
Total Hotel Revenue 9%	The total number of hotel rooms sold on the Gold Coast increased 4.6%, with the average occupancy rate improving 2.9 percentage points. Average revenue per available room also increased 8.7%, resulting in total hotel revenue growing by 9%.
Theme Park Revenue 1-2%	The Ardent Leisure Group and Village Roadshow, the two major operators of the Gold Coast's theme parks, recorded 1.4% and 1.8% decrease in revenue, respectively, achieved by their theme park portfolios.
Business Confidence High	According to Griffith University's Business Confidence Index, business confidence in tourism on the Gold Coast remains high.

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2.1. Context

Tourism on the Gold Coast benefitted generally from favourable weather in 2014. Annual rainfall was 1,143 mm compared with a 30-year average of 1,581 mm; this was mainly due to a dry first six months of 2014, which recorded only about half the average long-term precipitation. High rainfall in December – the peak holiday time – impacted upon visitation to theme parks.

Several major developments were completed and opened, including the Gold Coast Aquatic Centre in Southport and parts of the redeveloped Pacific Fair. The light rail, connecting the Gold Coast University Hospital and Griffith University with major tourism precincts in Southport, Surfers Paradise and Broadbeach, began operation in July 2014.

Confidence high

The recent announcement concerning the Australian Tourism Exchange taking place on the Gold Coast in 2016 highlights the confidence and optimism around tourism development in the region. It is estimated that the five-day event could bring an economic benefit of up to $13 million.

Jetstar announced a new service, linking the Gold Coast with Wuhan in China. The service will start in September 2015 subject to regulatory approval, and will be serviced twice a week by a 335-seat Boeing 787 Dreamliner.

Tourism stakeholders are optimistic for 2015 with the announcement of six charter flights from China to arrive during Chinese New Year between 14th and 28th of February. The opening of Chinatown in Southport on the 21st February represents a major event to advance Chinese tourism and culture on the Gold Coast.

On any given day there are 80,600 visitors in the Gold Coast Tourism Region.

2.2. Total visitation to the Gold Coast

In the year ending December 2014, total international and domestic overnight visitation to the Gold Coast was steady at 4,282,000 visitors, of which 20% were international visitors. During the same period daytrip visitation to the Gold Coast increased very slightly by 1% to 6,874,000 trips, with the 5-year average remaining steady.

The number of total visitor nights spent in Brisbane and the Gold Coast is forecast to increase by 3.5% over the next 10 years, above the 2.7% average predicted for Queensland (Tourism Research Australia, 2014).

Total overnight visitors average length of stay improved slightly, up 0.1 nights to 5.3 nights on average. During the calendar year 2014, total visitor expenditure to the Gold Coast decreased 3%, although the 5-year average growth rate of expenditure was steady (refer to Table 1). Figure 1 shows total visitor expenditure on the Gold Coast, revealing that the main source of income from tourism is derived from the domestic overnight market and the only growth in expenditure has been from the international market[1].

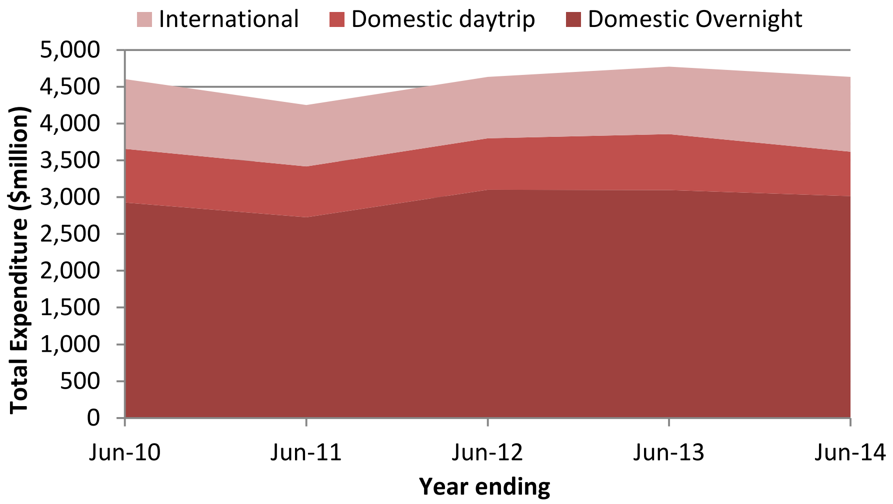

Figure 1 Total visitor expenditure on the Gold Coast (*Source*: Tourism Research Australia).

2.3. Domestic Visitors

Gold Coast ranks as Australia's No. 4 region in terms of domestic overnight visitors expenditure

In the year ending December 2014, domestic overnight visitors to the Gold Coast softened by 2% (or 56,000 visitors) to 3,434,000 visitors[2]. As a result of the decline in visitation, nights spent on the Gold Coast also fell 2% (or by 311,000 visitor nights), with average length of stay remaining relatively stable. This led to domestic expenditure in the Gold Coast tourism region decreasing by 3% (or by $79 million) (refer to Table 2). The five year average annual growth in domestic overnight expenditure was 1% for the region. Per visitor spend remained relatively stable (Figure 2).

[1] Note: Tourism Research Australia (TRA) only collects expenditure data at the national level. To estimate expenditure at the state and regional level, TRA employs the Regional Expenditure Model (REX). However, the REX model only provides limited top-line information for regional areas and is not disaggregated by purpose of visit or source market.

[2] Note: The total sample size for overnight visitors to the Gold Coast is around 1,400. Once this sample is split by source market and purpose of visit, the accuracy of the estimates is reduced. As there is considerable fluctuation in the time-series data where the sample size is small, only limited information is presented to avoid misrepresentation.

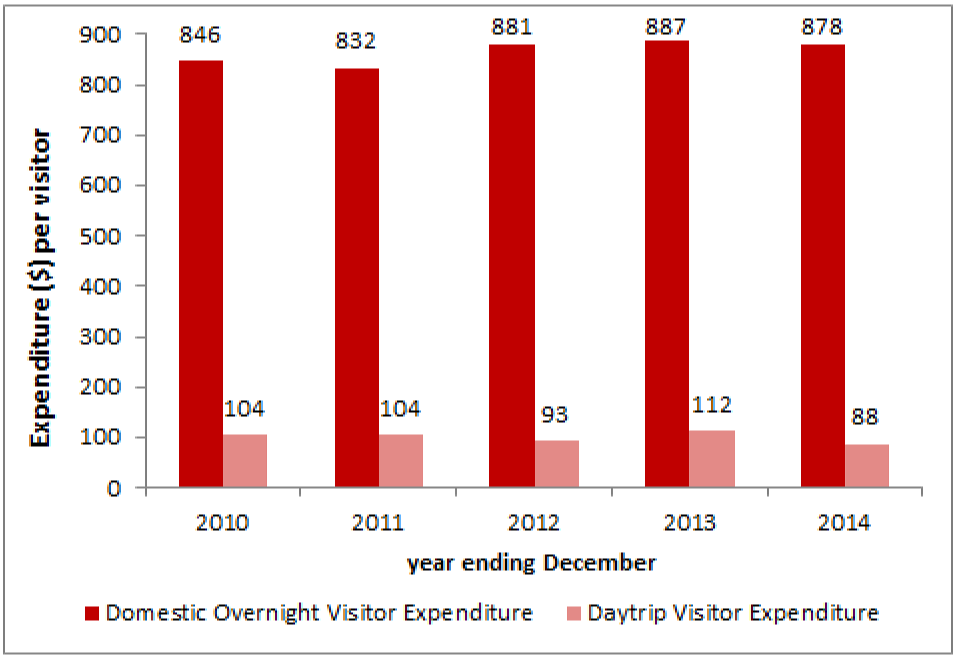

Figure 2 Gold Coast per visitor expenditure ($) by domestic overnight and daytrip visitors (TRA – Regional Expenditure Model).

Domestic holiday visitation to the Gold Coast during the period declined 5% to 1,998,000 visitors (or by 109,000 visitors). The Gold Coast's visiting friends and relatives (VFR) market increased 5% to 1,024,000 visitors (or by 51,000 visitors). Business travel by domestic visitors to the region declined 12% to 320,000 visitors (or by 43,000 visitors).

The key source markets of domestic overnight visitation to the Gold Coast in 2014 were Brisbane (1,146,000 visitors), Sydney (484,000 visitors), Melbourne (318,000 visitors), North Coast New South Wales (180,000 visitors), the Darling Downs (149,000 visitors) and the Sunshine Coast (120,000 visitors). The Brisbane overnight market had good growth during the year ending December 2014 (up by 17% or 170,000 visitors), as did the Melbourne market (up 6% or by 19,000 visitors). However, the other key domestic overnight markets experienced declines. The Brisbane overnight markets average length of stay on the Gold Coast remained steady at 2.5 nights.

Top 5 Domestic Overnight Source Markets (by visitors):

1. Brisbane (1.15 million)
2. Sydney (484,000)
3. Melbourne (318,000)
4. North Coast NSW (180,000)
5. Darling Downs (149,000)

The 5-year average annual growth in daytrips to the Gold Coast was flat, a trend that is continuing. Eighty-five percent of day trips to the Gold Coast occur for leisure[3]. The Brisbane market is the key source market for day trips accounting for 4,779,000 day trips. Day trip expenditure declined by 21% in the year ending December 2014, with the 5-year average declining by 4% driven by a decline in per visitor expenditure (refer to Table 3).

[3] Those visitors travelling for the purpose of a holiday or to visit friends and relatives

2.4. International Visitors

In the calendar year ending December 2014, the Gold Coast had strong growth in international visitation, with an increase of 7% (or 55,000 visitors). International visitors' average length of stay on the Gold Coast increased by 0.3 nights (or 3%) to 10.2 nights, resulting in total international visitor nights in the region increasing 10% (or 771,000 nights) to 8,655,000 nights.

International visitors to the Gold Coast increased their expenditure per night by 1% (or $2 per night), which when combined with increases in visitation and average length of stay, drove an overall 11% increase in expenditure in the region. The result was an additional $103 million being spent in the region in the year ending December 2014, resulting in the international market directly contributing $1,018 million to the Gold Coast economy during 2014 (refer to Table 4).

During the period the key international source market to the Gold Coast was China, followed closely by New Zealand. China had good growth increasing 8% (or 15,000 visitors) to 202,000 visitors. Despite the growth in visitor numbers, China's average length of stay in the region remains the lowest of all international source markets at just 5.5 nights (refer to Table 5)[4]. The New Zealand market also rebounded strongly with 8% growth (up 14,000 visitors); but the market is yet to reach peaks achieved in 2010. New Zealand remains the key source market in terms of total visitor nights spent on the Gold Coast, spending a total of 1,742,000 nights in the region in 2014.

Most international visitors to the Gold Coast visited for leisure[5], with 625,000 coming for a holiday and 121,000 visiting friends and relatives. The leisure market represents 94% of all international visitors on the Gold Coast. Recent growth has been mainly from the holiday market, which increased by 42,000 visitors during 2014 (refer to Table 6).

[4] Note: Due to the volatility in the visitor night estimates for a number of key source markets over time, only average length of stay is reported.

[5] Those visitors travelling for the purpose of a holiday or to visit friends and relatives

3. Gold Coast Competitiveness Analysis

This competitiveness analysis compares the Gold Coast against a key comparative set of Brisbane, Sunshine Coast, Tropical North Queensland, Sydney, Melbourne and Perth. It is important to understand that some of the competitor destinations (in particular Brisbane, Sydney and Melbourne) have a broader market base, including substantial business tourism segments.

In the year ending December 2014, the Gold Coast lost market share of the domestic overnight visitor market, receiving 4.2% of all domestic overnight visitors (down 0.4% points) and 4.5% of domestic visitor nights in Australia (down 0.5% points). This represented a loss of market share from the year ending December 2013. Similarly, the Gold Coast lost market share of overnight visitors total trip expenditure, receiving 5.5% in the year ending December 2014 (down 0.5% points). This share of expenditure is lower than the share received by Brisbane, but greater than that of the Sunshine Coast and Tropical North Queensland (refer to Table 7).

In the year ending December 2014, the Gold Coast's market share shifted from 5.0% to 4.5% in terms of domestic visitor nights. In contrast, Melbourne was the only comparative destination to improve its market share of visitor nights (up 0.3% to 7.3%). Melbourne also increased its share of visitor expenditure (up 1.0% to 12.0%). Like the Gold Coast, other key comparative regions of Brisbane, Sydney and Perth also experienced a decline in market share of visitor nights.

Despite the declines in domestic market share, the Gold Coast maintains high average trip expenditure at $878 per visitor, particularly when compared to other key regions. Only the Tropical North Queensland has higher average trip expenditure within the comparative set. The Gold Coast holds a mid-range position for average expenditure per visitor per night (refer to Table 8).

The Gold Coast has a 4.2% share of the domestic daytrip market in terms of visitor numbers and a 3.4% share in terms of trip expenditure. The Gold Coast's average daytrip expenditure per visitor is $88, below the $109 average of all daytrips in Australia (refer to Table 9).

Comparatively, the Gold Coast has a strong presence in the international market, with 13.3% of international visitors stopping over in the Gold Coast. However, only 5% of all international visitor nights and 5% of all international visitors' expenditure is spent on the Gold Coast. This is low when compared to Cities such as Sydney, Melbourne, Perth and Brisbane, but it is above the share achieved by the Sunshine Coast and Tropical North Queensland (refer to Table 10).

In the year ending December 2014, the Gold Coast's market share of the international visitor nights improved shifting from 3.7% to 3.9%. Comparatively, other destinations with improved market share included Sydney (up 0.3 percentage points to 29.1%), Perth (up 0.3 percentage points to 10.2%) and the Sunshine Coast (up 0.3 percentage points to 1.3%). Tropical North Queensland maintained its previous rate of market share of 11.7%, while Brisbane (down 0.6 percentage points to 9.4%) and Melbourne (down 0.2 percentage points to 19.8%) lost market share.

The Gold Coast's average international visitors' regional expenditure is $1,201, which is the second lowest per visitor expenditure in the comparative set, only ahead of the Sunshine Coast. This result is primarily due to the comparatively lower average length of stay of international visitors on the Gold Coast, particularly China. On a per night basis, the Gold Coast has high average expenditure when compared to other key stopover regions at $118 per night. Only the Tropical North Queensland has higher average per night expenditure within the comparative set at $144 per night (refer to Table 11).

4. Gold Coast Industry Indicators

4.1. Accommodation

In the year 2014, a total of 4,371,817 hotel rooms were sold on the Gold Coast, representing an increase of 4.6% compared with the previous year. The revenue generated as a result was $731 million. The average revenue per available room (RevPAR) has increased by 8.7% between 2014 and 2013, reaching $118 (as shown in Figures 3).

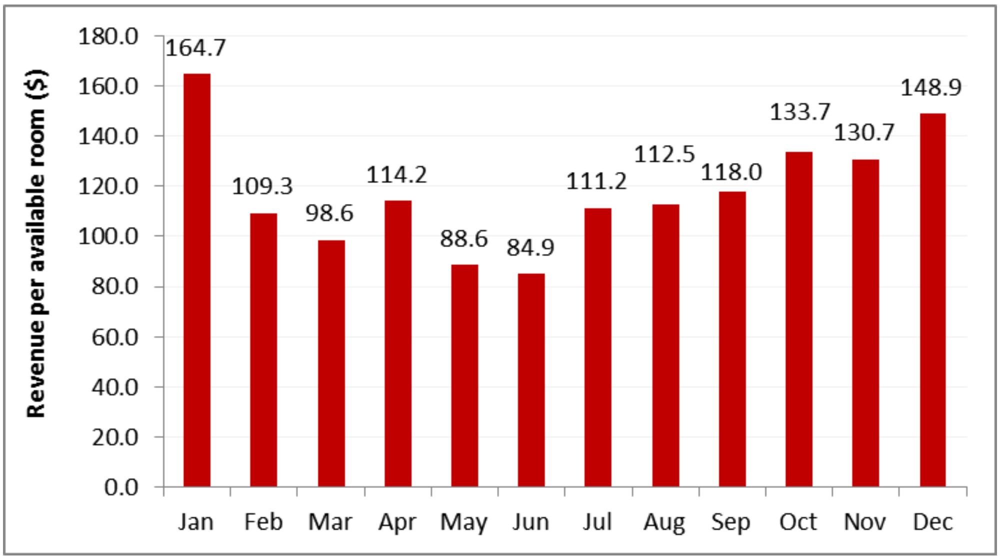

Figure 3 Gold Coast hotel accommodation revenue per available room (RevPAR) by month, year ending December 2014 (Source: Smith Travel Research).

Average occupancy rate also improved in the year 2014. In 2014, the average occupancy rate was 70.6% - the highest in the last five years. The month of January achieved an occupancy rate of 82.0%. Occupancy levels at the Gold Coast are relatively low compared with other destinations in Australia and New Zealand. The average occupancy rate in Australia and New Zealand was 75.5% and 73.9%, respectively (see Table 12).

Revenue per available room in hotels on the Gold Coast has grown by 9% since last year; more than twice as much as the Australian average growth.

4.2. Gold Coast Airport

Total passenger movements at Gold Coast Airport (OOL) amounted to 5,812,394 for the year ended December 2014 (Figure 4). This represents an increase of 1.3% compared with the previous calendar year 2013. Domestic tourism passenger movements grew by 1.5%, whereas international movements only increased by 0.3%. Domestic passengers at Gold Coast airport represent 84.6% of all passenger movements.

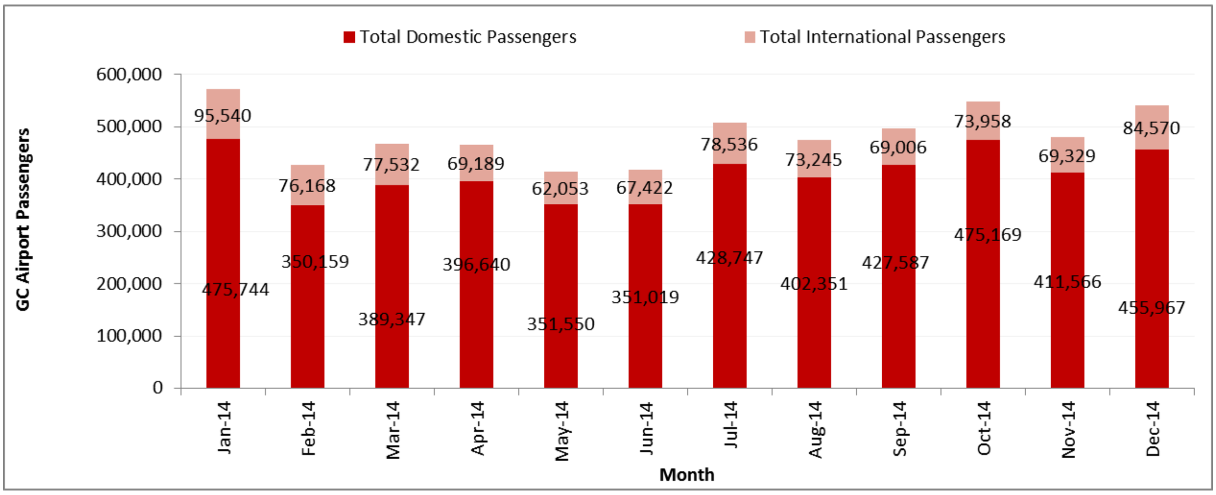

Figure 4 Gold Coast Airport domestic and international passenger movements per month, year ending December 2014 (Source: Gold Coast Airport).

The busiest international route servicing Gold Coast Airport continues to be the Auckland-Gold Coast city pair with a total of 145,549 passengers in the year ended December 2014. The second busiest route, Kuala Lumpur to Gold Coast, recorded a total of 107,683 passengers in 2014, displaying a relatively even distribution of between 8,000 and 10,000 passengers each month (Figure 5). Jetstar discontinued its Osaka-Gold Coast route in April, but added flights to Wellington and Queenstown in December. The airport stated in a media release that these two new services equate to over 112,000 additional seats per year into and out of Gold Coast Airport.

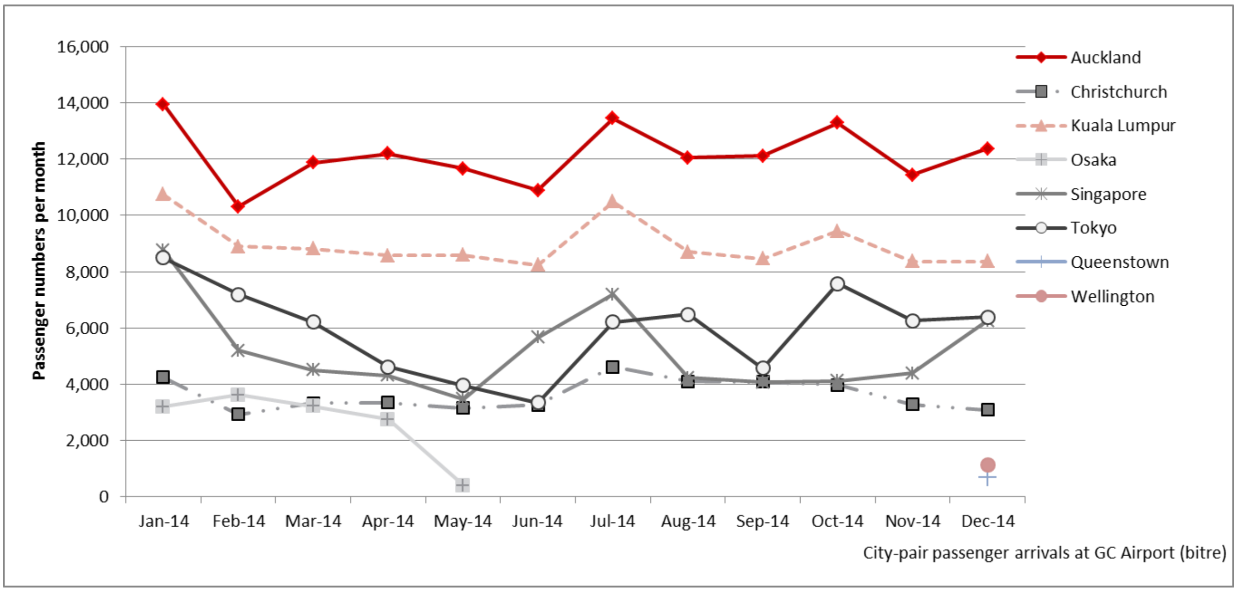

Figure 5 International Airline Activity at Gold Coast Airport: City Pairs Data, year ending December 2014 (Source: BITRE, 2014).

Brisbane Airport (BNE) recorded a similar growth rate (1.6% between calendar year 2014 and 2013, Figure 6) in total passenger movements, amounting to 21,941,695. Growth at Brisbane airport was mainly driven by international passenger movements with a growth rate of 5.5%. Domestic passenger movements increased by 0.6% in the calendar year 2014. The domestic share of all passenger movements at Brisbane airport is 77.5%.

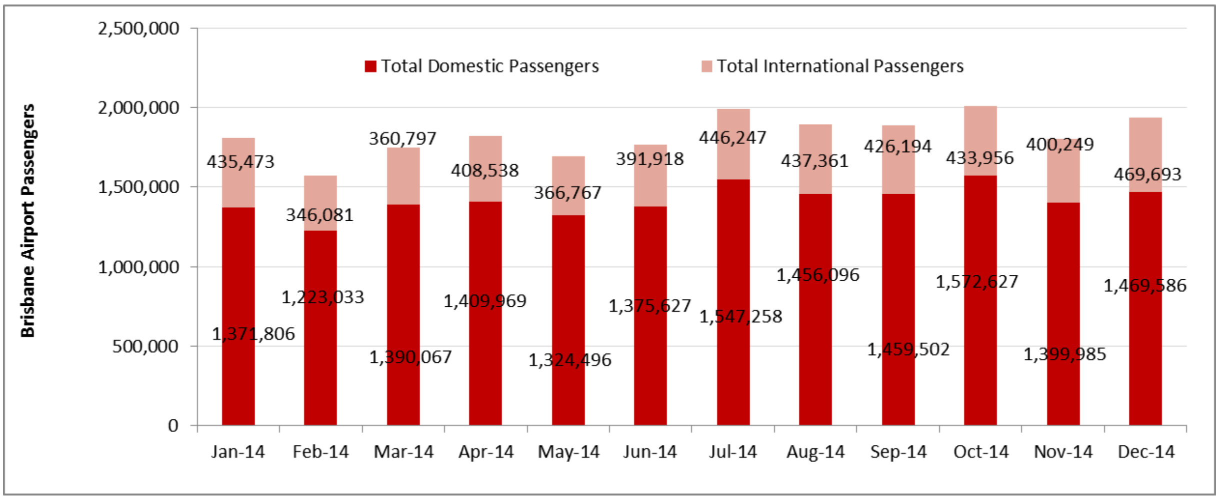

Figure 6 Brisbane Airport domestic and international passenger movements year ending December 2014 (Source: Brisbane Airport).

4.3. Theme Parks

Both theme parks report on their performance first half of their 2014/15 financial year; that is the 6 months from July 2014 to December 2014.

Village Roadshow operates Sea World & Sea World Resort & Water Park, Warner Bros. Movie World and Wet 'n' Wild on the Gold Coast. Two new junior attractions were launched in 2014: the Wet'n Wild Junior and Warner Bros. Junior Driving School. Data are available for the 6-month period from July to December 2014. For this period, the three operations Village Roadshow recorded a 1.4% decrease in income totaling $143.6 million. One reason for the drop was reported to have been adverse weather during the peak holiday season. Visitor numbers in the months from July 2014 to December 2014 were unchanged at 2.7 million (see Table 13).

The Ardent Leisure Group Theme Parks include Dreamworld, White Water World, and the SkyPoint Observation Deck and SkyPoint Climb. Dreamworld launched four new Food and Beverage outlets - Green Bean Coffee Co, Dough Bros Pizzeria, Food Central Burger Bar, The Sandwich Shop; and new 'Tailspin' thrill ride and 'Triple Vortex' water slide. For the second time, Dreamworld was awarded Queensland's Best Major Tourist Attraction at the Queensland Tourism Awards. However, due to decreased per capita spending, overall revenue decreased slightly (by 1.8%) to $54.6 million. Visitor numbers increased by 10.7% to 1.18 million in the 6-month period reported.

4.4. Business Sentiment

The Griffith University's Business Confidence Index, conducted by Spence Consulting (80-100 respondents out of a database of 300 businesses quarterly) gathers data on Gold Coast business sentiment. Business confidence in general has become more positive during the course of 2014. Confidence in the tourism market has particularly increased with 71% of respondents in the months of September to November feeling positive or highly positive (see Table 14).

5. Australian Travel Trends

Key facts about Australia in the global tourism context (UNWTO - Tourism Barometer):

- International arrivals to Australia have increased by 7.5% in 2014.
- Australia continues to rank 11th worldwide in terms of international receipts.
- International receipts have increased by 9.7% in Australia, compared with the same period in the previous year (based on preliminary data).
- Australians spent US$26.3 billion overseas; they are the 9th largest spenders on tourism globally.

5.1. Context

Tourism in Australia is likely to have benefited from lower fuel costs in the fourth quarter of 2014. The drop in fuel prices fell from US$115 per barrel of crude oil (Brent) in June to just US$53 at the end of December 2014 will have been a positive factor especially for domestic drive tourism. Airlines have been slow in adjusting their fuel surcharges.

The weaker Australian dollar was welcomed by the tourism industry (Figure 7). Especially in the last three months of 2014, the AUD fell significantly against all major currencies. At the end of 2014, the AUD was worth only US$0.81. Comparatively, the AUD was relatively more stable against the Euro and the British Pound.

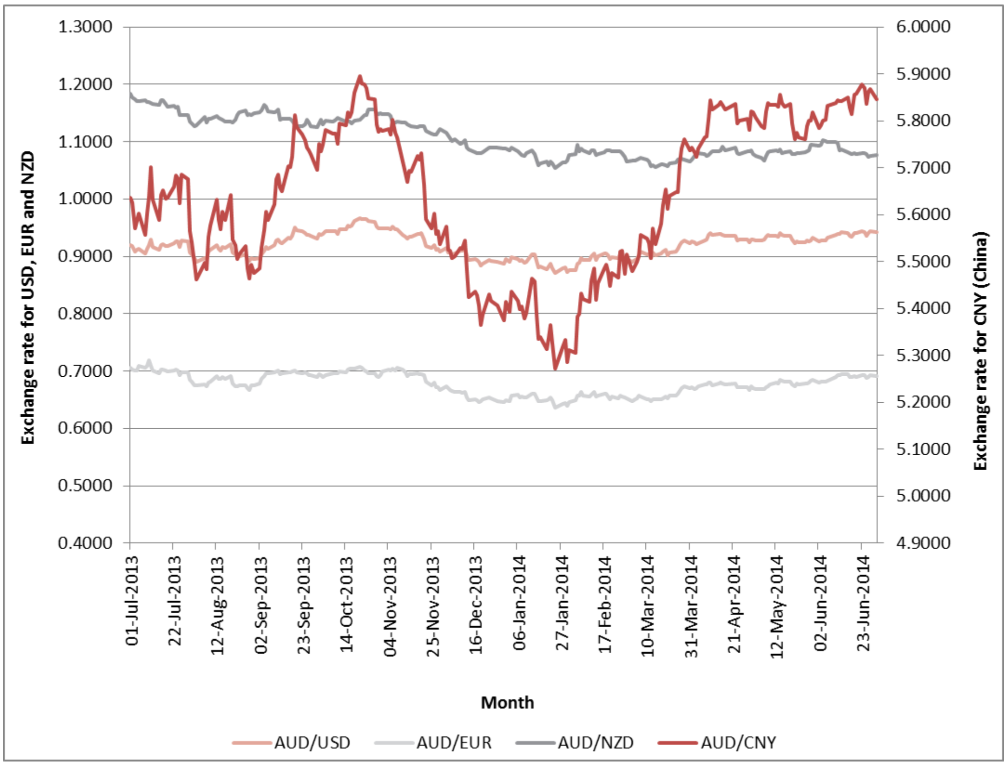

Figure 7 Foreign exchange trends for the Australian dollar (*Source*: www.oanda.com).

The TTF Mastercard survey for the third quarter of 2014 shows that the tourism sector has become slightly more concerned about the exchange rate compared to the last year (Figure 8). The sharp drop in the fourth quarter may have reduced this concern. Another perceived business impediment that emerged in the 2014 quarter 3 compared with the previous year related to taxes charged on tourists and the quality of retail offering.

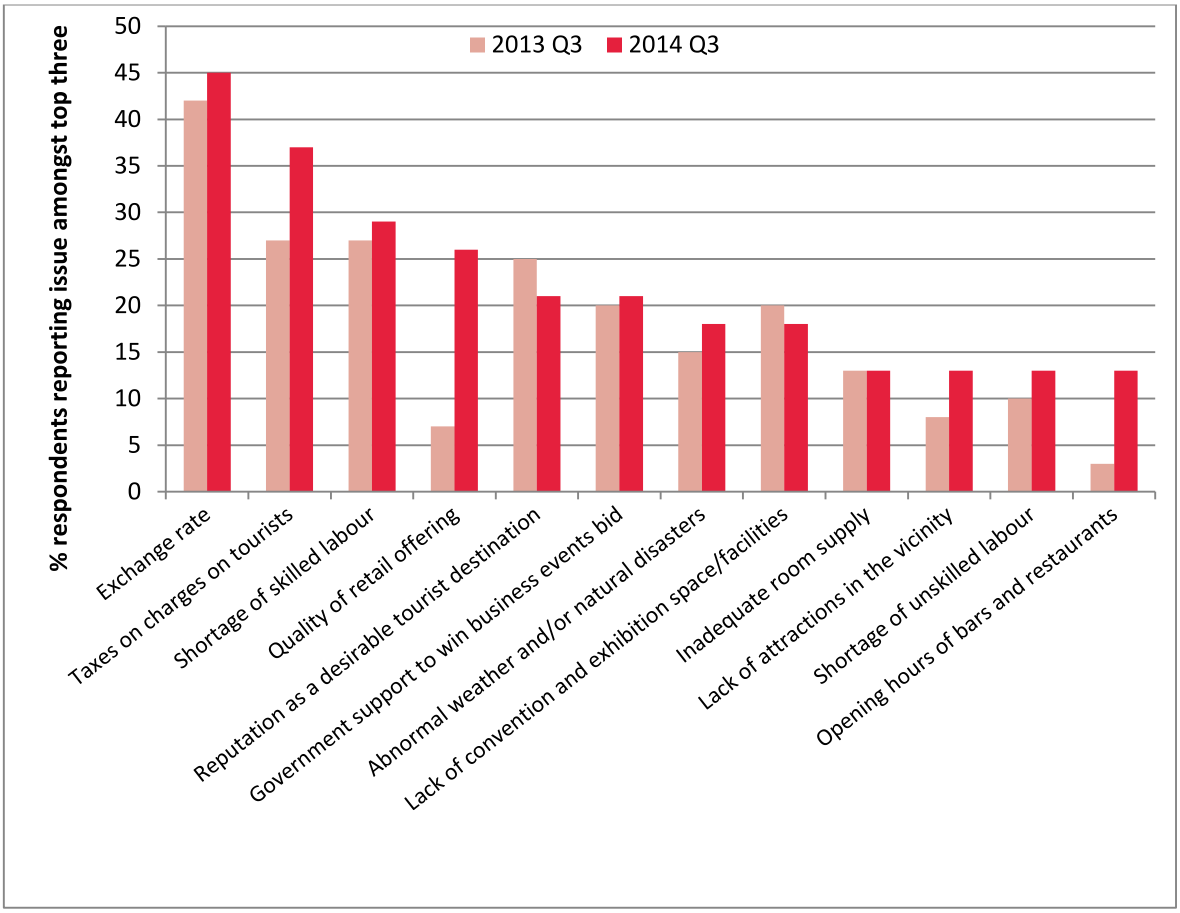

Figure 8 TTF Mastercard survey: perceptions of business impediments for tourism (Quarter 3 of 2014).

Nielsen Consumer Confidence Index 2014:

Despite some of the above trends, and according to the Nielsen Consumer confidence index, Australian consumer confidence has trended downwards since September 2010 and was just 85 points in June 2014. At the end of 2014, the Australian consumer confidence reached 93 (down by 4 points from the previous quarter). Forty-five percent of Australians stated that the next 12 months was a good time to buy the things they want and need; this number had increased from 40% in the period in 2013 and was also higher than the global average of 39%.

(Source: http://www.nielsen.com/au/en/insights/news/2015/where-is-the-love-store-loyalty-down-as-savvy-consumers-use-promotions-to-shop-around.html)

5.2. Total Visitation in Australia

In the year ending December 2014, total international and domestic overnight visitors aged 15 years and over in Australia increased by 7% to 87.8 million visitors, of which 7% are international visitors. Average length of stay of total overnight visitors remained steady at 6.1 nights in the year ending December 2014, maintaining the 5-year average. Daytrip visitation by domestic Australian residents was steady at 164.4 million trips.

Total expenditure in Australia by international, domestic overnight and daytrip visitors increased by 4% to $92.9 billion in the year ending December 2014 compared with the previous year. During the same period the all-groups consumer price index increased by 1.7% (Reserve Bank of Australia, 2014), indicating that real total visitor expenditure in Australia had good growth (refer to Table 15).

5.3. Domestic Visitors

In the year ending December 2014, domestic overnight visitation increased 7%. The 5-year growth rate increased 3% per annum on average. Domestic visitors nights away from home also increased 9% on the previous year, driven by the increase in number of trips, as well as slightly improved average length of stay (up 2%). Total domestic overnight expenditure in Australia increased 6% to $54.4 billion in this period as a result of the increase in visitation (refer to Table 16).

Domestic daytrip visitors in Australia remained steady during the period at 164,361,000 trips. Day trip visitors' expenditure declined 2% to $109 per visitor (refer to Table 17).

5.4. International Visitors

In the year ending December 2014, international visitors to Australia increased by 8% (or 452,000 visitors) to 6,357,000 visitors. Visitor nights increased by 3% (up 5.9 million nights to 222.9 million nights), with the 5-year trend revealing a 4% average annual growth rate.

Total international visitor expenditure in Australia increased by 4% (up $884 million) to $20,538 million in the year ending December 2014, driven by the increase in visitation. As average length of stay declined 5%, expenditure on a per visitor basis declined 3% or by $98 per visitor (refer to Table 18).

The growth in international visitation to Australia was driven by growth in leisure[6] visitors, which increased by 375,000 visitors to 4,610,000 visitors in 2014 (up 9% on 2013). This increase in visitors delivered growth in total leisure nights (up 3%) and expenditure by leisure visitors in Australia (up 7%).

> With their expenditure forecast to increase to $10.2 billion by the year ending June 2023, China is critical for the future of Australia's tourism industry.

The key international market for Australia in terms of visitor numbers continues to be New Zealand (1,134,000

[6] Those visitors travelling for the purpose of a holiday or to visit friends and relatives

visitors), followed by China (784,000 visitors), the United Kingdom (615,000 visitors) and the United States (523,000 visitors). In terms of visitor nights, China has outstripped the United Kingdom which has traditionally been the key long-stay market for Australia. Chinese visitors had the highest total expenditure, spending $4.2 billion in Australia and contributing 20% to total international expenditure.

Chinese visitors now spend an average of 43 nights in Australia, compared to the United Kingdom average of 41 nights. The Chinese leisure market has being growing strongly (up 22% or 105,800 visitors) and they have increased their average length of stay from 21.2 nights in 2013 to 23.1 nights in 2014.

Besides China, other key growth markets in terms of visitor numbers for Australia in the year ending December 2014 include the United States (up 50,300 visitors), New Zealand (up 49,000 visitors) and Malaysia (up 41,600 visitors).

In the year ending December 2014, Queensland received 2,148,000 visitors (an increase of 6%) who spent a total of $4.2 billion (an increase of 4%). Growth rates in terms of expenditure were comparatively lower for Queensland than in all other states, except for South Australia.

5.5. Outbound travel by Australians

Deloitte Access Economics forecasts that outbound travel will ease to 3-3.5% growth rate for the next three years.

In the year ending September 2014[7], outbound travel remained attractive for Australians, particularly those travelling for a holiday. However, the growth in outbound holiday travel has slowed from growth rates over 10% up to 2011 to more modest growth rates of around 6% since 2011. The latest period showed a 4% increase in outbound holiday travel, with a 6% 5-year average annual growth rate. However, the number of all outbound trips increased 6% to 8,097,000, maintaining the five year average annual rate of 6%. This growth was accompanied by a 5% increase in nights and a slight 1% decline in expenditure. Expenditure per visitor declined 6%, or approximately $399 per visitor, with the average outbound visitor spending $5,822 per trip (refer to Table 19).

[7] Note: Reporting period is year ending March as Tourism Research Australia collects information on outbound travel by Australians, but the collection lags behind that of the overnight and daytrip results due to the duration of the domestic residents' overseas trip.

6. Global Travel Trends

According to the United Nations World Tourism Organization (UNWTO), the volume of international tourism arrivals reached 1,135 million globally in the year ending December 2014 (Figure 9). This represents an increase of 4.4% on the previous year[8]. The UNWTO forecasts that international tourism will grow at a rate between 3% and 4% in 2015.

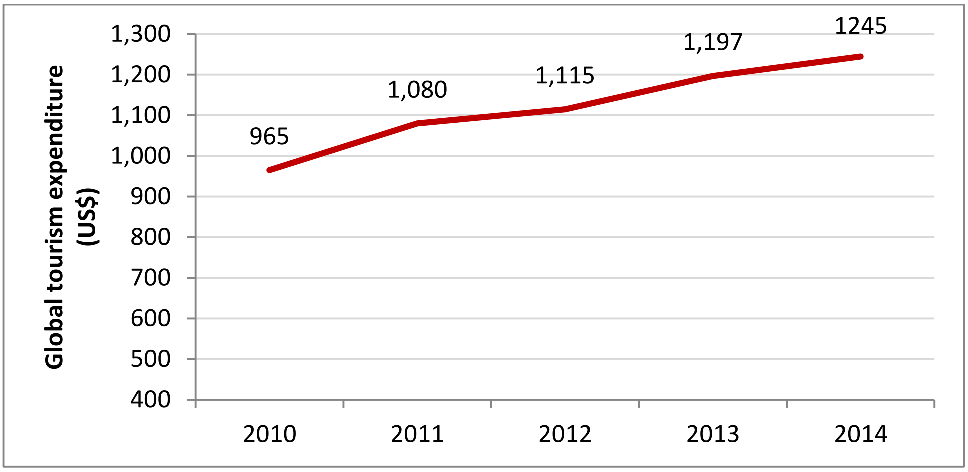

Figure 9 Global tourism expenditure (US$ billion) for the last five years (Source: United Nations World Tourism Organisation, 2015).

Europe remains the largest tourist destination in terms of international tourism receipts[9], with the region receiving 41% (US$508.8 billion) of global tourism expenditure in 2014 (Figure 10). The Asia Pacific region was the second largest receiver of tourism expenditure (30% of global expenditure with US$376.9 billion). Tourism receipts in Asia Pacific grew by 4.5% in 2014 compared with the previous year.

[8] Note: Global tourism data are provided by the UNWTO's World Tourism Barometer.

[9] **International tourism receipts** are the receipts earned by a destination country from inbound tourism and cover all tourism receipts resulting from expenditure made by visitors from abroad. This concept includes receipts generated by overnight as well as by same-day trips by visitors from neighbouring countries. It excludes the receipts related to international transport contracted by residents of other countries (e.g. ticket receipts from foreigners travelling with a national company).

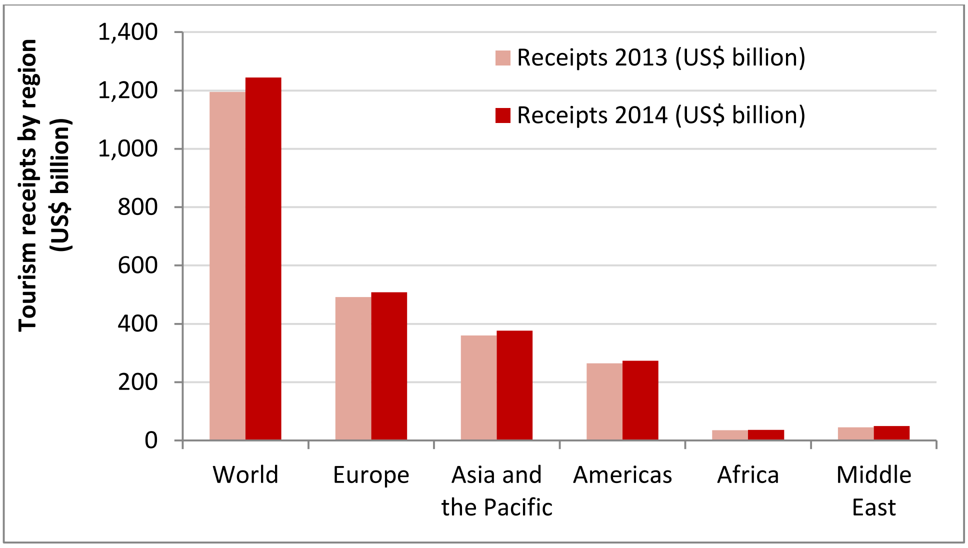

Figure 10 International tourism receipts in world regions (*Source*: United Nations World Tourism Organisation, 2015).

The Chinese continued to be the world's largest spender on tourism activity: in 2014 they spent US$164.9 billion on international tourism. Chinese expenditure grew by 28.2% compared with the previous year. Travellers from the USA were the second largest spender with US$111.7 billion in 2014 (a growth of 6.7%) (Figure 11).

"We expect demand to continue growing in 2015 as the global economic situation improves even though there are still plenty of challenges ahead. On the positive side, oil prices have declined to a level not seen since 2009. This will lower transport costs and boost economic growth by lifting purchasing power and private deamdn in oil importing countries. Yet, it could negativelyimpact some of the oil exporting countries which have emerged as strong tourism source markets." Mr Talib Rifai, Secretary-General, UNWTO, 2015.

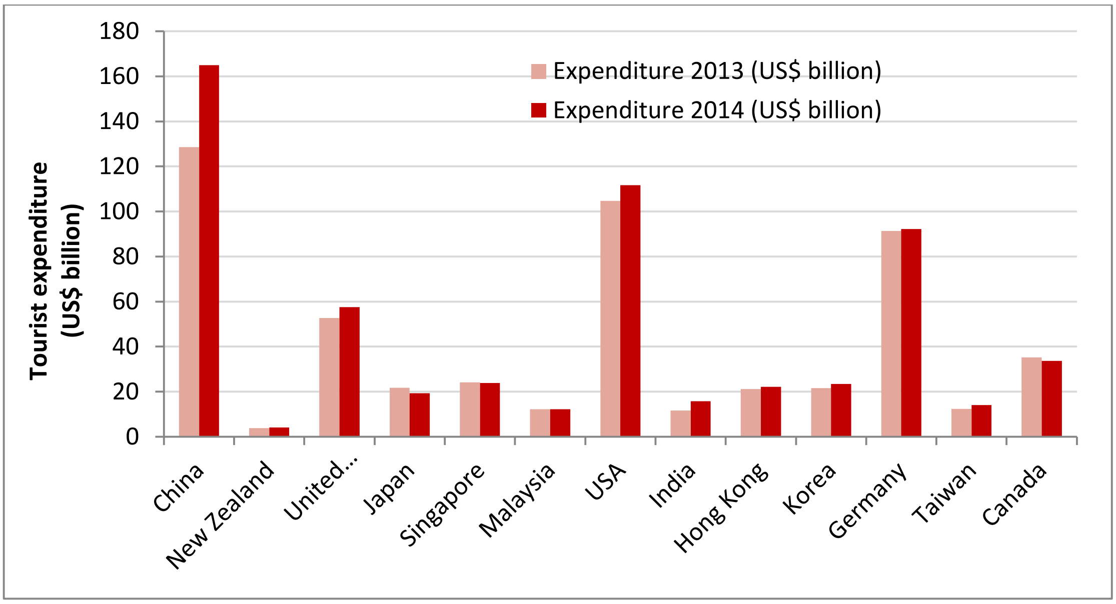

Figure 11 International tourism expenditure (outbound tourism) for key source countries for Australia (*Source*: United Nations World Tourism Organisation, 2015).

7. Tourism Insights: Benefits of Events for Tourist Destinations

The impact of events is traditionally considered in terms of their outcomes for the economy, as this is one approach that helps to justify expenditure on an event. Economic impact assessments typically seek to quantify how much 'new' money entered the economy, through tourism or the investment of external sponsors or governments, as well as how that money was distributed throughout the economy. The ability of events to attract tourists is an important consideration as research indicates that individuals can be highly committed to a particular leisure activity, and travel long distances to attend specific events. Committed individuals can follow what Getz (2012) described as an 'event travel career' where over time they travel further or more frequently, seeking novel, challenging, or prestigious event experiences (Lamont, Kennelly & Wilson, 2012).

There are many issues with measuring the economic impact of an event, leaving economic impact assessments open to criticism. For example, events often displace people; when a major event is hosted in a community, local residents may leave during the event to avoid crowds, or other tourists may choose not to visit the destination, or tourists may delay their trip until a later date to avoid congestion and high accommodation costs. Another issue is 'leakage' of economic benefits. For example, when a major event is hosted, local businesses may spend money buying supplies from another city or state – meaning that the money spent by tourists in the host community subsequently leaks out, undermining the benefits of hosting the event. For these reasons, economic impact assessments can only be considered estimates (Mackellar, Kennelly, & Pye, in press).

Taking into account the limitations of economic impact studies, it is important to recognise the social impacts that form part of an event's value. Events can have important impacts on mental health outcomes, for example by fostering positive emotions, relationships, a sense of accomplishment, engagement and meaning (Filo & Coghlan, in press), or by enabling individuals to apply their strengths of character in new ways (Coghlan & Filo, 2014; Kennelly, Moyle, & Lamont, 2013). Sporting events can also be designed to contribute towards lifestyle medicine, encouraging event attendees to become active participants in managing some of the biggest causes of mortality in Australia (Coghlan, 2014). In addition, events can create social capital outcomes which contribute to building more resilient communities that can deal with crises. If potential social impacts are considered within the design of events, an event's engagement with the community in which it is set can be enhanced (Coghlan, in press).

Importantly, events also contribute to a sense of pride in the places where they are set. The importance of this cannot be understated as a sense of place is what underpins good tourism experiences. The community engagement aspects of events, specifically how communities welcome and host others, and deliver and enjoy the event experience, all have direct implications for tourism within a destination. Events play a role in branding a destination, and an engaged host community actively contributes to establishing the sought after "authenticity" of a place. Arguably, the social value of events can also increase their economic value. Understanding the social impacts of an event can complement economic assessments when it comes to planning for tourism and event portfolios of a destination.

To find out more about event tourism research, please contact: Dr Alexandra Coghlan: a.coghlan@griffith.edu.au or Dr Millie Kennelly: m.kennelly@griffith.edu.au

8. City of Gold Coast Support of Events

Acquiring and delivering major events that complement the City of Gold Coast's competitive advantages of enviable lifestyle and stunning natural environment has been identified as the City's biggest opportunity to drive increased visitation. The City will target world-class events leveraging the once in a lifetime opportunity the Gold Coast 2018 Commonwealth Games (GC2018) presents to evolve our image as a global events destination.

The Gold Coast events industry is made up of a broad range of industry sectors including:

- Business events (for example, conference, conventions, exhibitions and trade shows)
- Mass participation events (for example, Gold Coast Airport Marathon)
- Beach and water sports spectator events (for example, Quicksilver, Roxy Pro)
- National/international spectator sporting events (for example, Magic Millions Race Day)
- Arts and cultural events (for example, Blues on Broadbeach, Bleach)
- Professional football/sports spectator events (for example, AFL Suns, NRL Titans)
- Sports Events (for example, national, state and regional sporting carnivals and championships)

As a key action of the Embracing 2018 Tourism Working Group, Economic Development is leading the Gold Coast Sport Tourism Plan. This plan will comprise information about the future vision and targets for sport in the city in the lead up to and post GC2018, underpinned by the Gold Coast Sport Plan 2013-2023. Whilst the sporting targets will include non-Commonwealth Games sports, it will have a focus on particular targets and initiatives aimed at Commonwealth countries. It is expected that a draft plan will be complete by June 2015.

Currently, the City is working on the following key elements as part of the Gold Coast Sport Plan implementation via the city sport investment attraction program, This work will also inform the Sport Tourism Plan through attracting sporting events, bringing high performance sport teams into the city to train prior to sporting events, attracting and retaining peak sport bodies, and further building partnerships in the lead up to GC2018.

9. Data Tables

Table 1 Total Overnight and Daytrip Visitors on the Gold Coast[a], year ending December 2010 to December 2014

					Expenditure	
Year ending	**Total Overnight Visitors ('000)[b]**	**Total Visitor Nights ('000)**	**Average length of stay (nights)**	**Daytrip visitors ('000)**	**Total ($million)**	**per visitor ($)**
Dec-10	4,265	22,205	5.2	6,977	4,604	410
Dec-11	3,991	21,350	5.3	6,621	4,252	401
Dec-12	4,263	21,720	5.1	7,473	4,635	395
Dec-13	4,282	22,070	5.2	6,808	4,771	430
Dec-14	4,282	22,530	5.3	6,874	4,635	416
12-month Real change	0	460	0.1	66	-135	-15
12-month Percentage change (%)	0	2	2	1	-3	-3
5-year average growth (%)	0	0	0	0	0	0

a. All figures relate to International Visitors and Australian residents aged 15 years and over.
b. Total international and domestic overnight visitors on the Gold Coast
Source: Tourism Research Australia, International and National Visitor Surveys

Table 2 Domestic Overnight Visitors to the Gold Coast[a], year ending December 2010 to December 2014

				Expenditure	
Year ending	**Overnight Visitors ('000)**	**Visitor Nights ('000)**	**Average length of stay (nights)**	Including airfares and long distance transport costs ($million)	per Visitor ($)
Dec-10	3,460	14,094	4.1	2,928	846
Dec-11	3,276	13,305	4.1	2,726	832
Dec-12	3,521	14,041	4.0	3,101	881
Dec-13	3,490	14,186	4.1	3,094	887
Dec-14	3,434	13,875	4.0	3,015	878
12-month Real change	-56	-311	0.0	-79	-9
12-month Percentage change (%)	-2	-2	-1	-3	-1
5-year average growth (%)	0	0	0	1	1

a. All figures relate to Australian residents aged 15 years and over.
Source: Tourism Research Australia, National Visitor Survey

Table 3 Domestic Daytrip Visitors on the Gold Coast[a], year ending December 2010 to December 2014

Year ending	Visitors ('000)	Expenditure ($million)	Expenditure per visitor ($)
Dec-10	6,977	726	104
Dec-11	6,621	691	104
Dec-12	7,473	698	93
Dec-13	6,808	761	112
Dec-14	6,874	603	88
12-month Real change	66	-159	-24
12-month Percentage change (%)	1	-21	-22
5-year average growth (%)	0	-4	-3

a. All figures relate to Australian residents aged 15 years and over.
Source: Tourism Research Australia, National Visitor Survey

Table 4 International Visitors on the Gold Coast[a], year ending December 2010 to December 2014

				Expenditure	
Year ending	Visitors ('000)	Visitor Nights ('000)	Average length of stay (nights)	Including package ($million)	per visitor ($)
Dec-10	805	8,111	10.1	949	1,179
Dec-11	715	8,045	11.3	835	1,168
Dec-12	741	7,680	10.4	836	1,127
Dec-13	792	7,884	10.0	915	1,156
Dec-14	847	8,655	10.2	1,018	1,201
12-month Real change	55	771	0.3	103	46
12-month Percentage change (%)	7	10	3	11	4
5-year average growth (%)	1	1	0	1	0

a. All figures relate to International Visitors aged 15 years and over.
Source: Tourism Research Australia, International Visitor Survey

Table 5 International Visitors on the Gold Coast by country of residence[a], year ending December 2014

Country of residence	Visitors ('000)	12-month real change ('000)	12-month percentage change (%)	5-year average growth (%)	Average length of stay (nights)
New Zealand	193	14	8%	0	9.0
Japan	51	-4	-7%	-14	15.6
Hong Kong	21	3	17%	2	14.8
Singapore	37	-2	-4%	9	7.3
Malaysia	30	2	6%	0	5.8
Taiwan	17	0	1%	-3	15.8
Korea	20	-6	-22%	-13	15.3
China	202	15	8%	12	5.5
India	23	4	24%	18	9.3
Other Asia	22	1	7%	1	13.8
United States	28	3	11%	1	7.3
Canada	17	3	24%	-1	16.8
United Kingdom	61	-1	-2%	-3	11.8
Germany	25	8	46%	10	8.2
Scandinavia	14	3	23%	1	12.2
Other Europe	45	2	4%	-2	14.9
Other Countries	41	9	28%	3	22.1
Total	847	55	7%	1	10.2

a. All figures relate to International Visitors aged 15 years and over.
Source: Tourism Research Australia, International Visitor Survey

Table 6 International Visitors on the Gold Coast by purpose[a], year ending December 2014

Purpose of visit	Visitors ('000)	12-month real change ('000)	12-month percentage change (%)	5-year average growth (%)	Average length of stay (nights)
Holiday	666	53	9%	0	6.4
Visiting friends & relatives	132	-2	-2%	0	15.3
Business	30	-8	-23%	-3	6.4
Education	19	0	-1%	-2	115.5
Other	6	1	32%	-5	62
Total	847	42	5%	0	10.6

a. All figures relate to International Visitors aged 15 years and over main reason for stopping over in the destination.
Source: Tourism Research Australia, International Visitor Survey

Table 7 Domestic Overnight Visitors by comparative regions[a], year ending December 2014

Comparative regions	Overnight visitors ('000)	% of Visitors	Visitor Nights ('000)	% of Visitor Nights	Trip Expenditure ($m)	% of Total Trip Expenditure
Gold Coast	3,434	4.2	13,875	4.5	3,015	5.5
Brisbane	5,166	6.3	16,983	5.5	3,166	5.8
Sunshine Coast	2,885	3.5	10,736	3.5	1,848	3.4
Tropical North Queensland	1,685	2.1	9,094	2.9	1,705	3.1
Sydney	8,527	10.5	23,417	7.6	6,063	11.1
Melbourne	7,787	9.6	22,502	7.3	6,525	12.0
Perth	3,306	4.1	11,149	3.6	2,790	5.1

a. All figures relate to Australian residents aged 15 years and over.
Source: Tourism Research Australia, National Visitors Survey

Table 8 Domestic Overnight Visitor expenditure by comparative regions[a], year ending December 2014

Comparative regions	Trip Expenditure ($m)	Average Trip Expenditure per visitor	Average expenditure per visitor per night	Average length of stay (nights)
Gold Coast	3,015	878	217	4.0
Brisbane	3,166	613	186	3.3
Sunshine Coast	1,848	641	172	3.7
Tropical North Queensland	1,705	1,012	188	5.4
Sydney	6,063	711	259	2.7
Melbourne	6,525	838	290	2.9
Perth	2,790	844	250	3.4

a. All figures relate to Australian residents aged 15 years and over.
b. This is the average of only those who identified as having stayed in commercial accommodation.
Source: Tourism Research Australia, National Visitors Survey

Table 9 Domestic Daytrip visitors by comparative regions, year ending December 2014[a]

Comparative regions	Visitors ('000)	% of Visitors	Trip Expenditure ($m)	% of Trip Expenditure	Average Trip Expenditure per Visitor
Gold Coast	6,874	4.2	603	3.4	88
Brisbane	11,182	6.8	1,180	6.6	106
Sunshine Coast	5,484	3.3	546	3.0	100
Tropical North Queensland	2,173	1.3	231	1.3	106
Sydney	18,937	11.5	2,010	11.2	106
Melbourne	16,403	10.0	1,830	10.2	112
Perth	11,068	6.7	1,088	6.1	98

a. All figures relate to Australian residents aged 15 years and over.
Source: Tourism Research Australia, National Visitors Survey

Table 10 International visitors by comparative regions, year ending December 2014[a]

Comparative regions	Visitors ('000)	% of Visitors	Visitor Nights ('000)	% of Visitor Nights	Regional Expenditure ($m)	% of Regional Expenditure
Gold Coast	847	13.3	8,655	5.0	1,018	5.0
Brisbane	997	15.7	20,621	7.5	1,520	7.5
Sunshine Coast	253	4.0	2,840	1.1	220	1.1
Tropical North Queensland	739	11.6	6,431	4.5	924	4.5
Sydney	3,007	47.3	63,859	31.3	6,384	31.3
Melbourne	2,026	31.9	43,612	22.7	4,625	22.7
Perth	773	12.2	22,430	9.8	2,004	9.8

a. Estimates are for International Visitors aged 15 years and over
Source: Tourism Research Australia, International Visitors Survey

Table 11 International Visitors expenditure and average length of stay by comparative regions[a], year ending December 2014

Comparative regions	Regional Expenditure ($m)	Average Regional Expenditure per visitor	Average Regional expenditure per visitor per night	Average length of stay (nights)
Gold Coast	1,018	1,201	118	10.2
Brisbane	1,520	1,524	74	20.7
Sunshine Coast	220	867	77	11.2
Tropical North Queensland	924	1,250	144	8.7
Sydney	6,384	2,123	100	21.2
Melbourne	4,625	2,283	106	21.5
Perth	2,004	2,594	89	29.0

a. Estimates are for International Visitors aged 15 years and over
Source: Tourism Research Australia, International Visitors Survey

Table 12 Comparison of accommodation occupancy and RevPAR year ended 2014 compared with year ended 2013 for key destinations in Australia and New Zealand

	Occupancy (%)		Revenue per available room ($)	
	2014	Change from previous year (%)	2014	Change from previous year (%)
Australia	**75.5**	**2.1**	136.60	**4.1**
Gold Coast	71.2	5.0	119.10	9.6
Adelaide	79.6	4.7	119.17	5.7
Brisbane	78.3	0.5	147.17	2.2
Cairns	74.3	5.1	94.84	10.3
Canberra	70.8	-3.0	114.93	-7.0
Melbourne	81.7	2.2	151.13	4.5
Perth	83.6	0.1	167.91	-3.8
Sydney	83.7	1.1	167.57	4.2
Darwin	76.0	-5.3	143.88	-1.1
Hobart	79.7	3.2	126.97	5.8
New Zealand	**73.9**	**4.4**	**105.75**	**8.4**
Auckland	80.0	4.1	118.04	9.3
Queenstown	74.1	9.0	113.09	11.9
Wellington	74.0	0.8	110.90	4.6

Table 13 Revenue and visitation at Ardent Leisure Group and Village Roadshow theme Parks Gold Coast (Source: Ardent Leisure Group and Village Roadshow Annual Reports half year ended December 2014)

	Revenue ('000)	**% Change**	**Visitation**	**% Change**
Theme Parks (Ardent)	143,600	-1.4	2,700,000	No change
Village Roadshow	54,781	-1.8	1,178,270	10.7%

Table 14 Gold Coast business sentiment for three 3-month periods in 2014 (Source: Spence Consulting)

What is your level of confidence over the next three months regarding the …. ?					
		Feb-14	May-14	Aug-14	Nov-14
Gold Coast economy generally	Highly positive	0%	11%	6%	13%
	Positive	54%	36%	54%	56%
	Neutral	29%	36%	31%	24%
	Negative	17%	10%	9%	6%
	Highly negative	0%	7%	0%	1%
Gold Coast property market	Highly positive	0%	6%	6%	10%
	Positive	66%	47%	62%	54%
	Neutral	31%	36%	23%	35%
	Negative	3%	11%	8%	1%
	Highly negative	0%	0%	0%	0%
Gold Coast tourism market	Highly positive	11%	10%	14%	27%
	Positive	77%	36%	57%	57%
	Neutral	12%	40%	29%	15%
	Negative	0%	14%	0%	1%
	Highly negative	0%	0%	0%	0%
Gold Coast retail market	Highly positive	0%	10%	0%	7%
	Positive	49%	27%	40%	53%
	Neutral	34%	34%	37%	39%
	Negative	17%	28%	23%	1%
	Highly negative	0%	1%	0%	0%

Table 15 Total Overnight and Daytrip Visitors in Australia[a], year ending December 2010 to December 2014

Year ending	Total Overnight Visitors ('000)[b]	Total Visitor nights ('000)	Average length of stay	Daytrip visitors ('000)	Total expenditure in Australia ($000)[c]	Expenditure per visitor ($)[c]
Dec-10	74,651	451,619	6.0	155,942	78,814	342
Dec-11	77,238	466,673	6.0	161,232	82,798	347
Dec-12	80,061	489,683	6.1	173,905	86,955	342
Dec-13	81,701	499,706	6.1	164,322	89,411	363
Dec-14	87,793	531,816	6.1	164,361	92,940	369
12-month Real change	6,092	32,110	0	39	3,528	5
12-month Percentage change (%)	7	6	-1	0	4	1
5-year average growth (%)	3	3	0	1	3	2

a. All figures relate to International Visitors and Australian residents aged 15 years and over.
b. Total international and domestic overnight visitors in Australia.
c. Includes international and domestic overnight visitor expenditure, as well as daytrip expenditure.
Source: Tourism Research Australia, International and National Visitor Surveys

Table 16 Domestic Overnight Visitors in Australia[a], year ending December 2010 to December 2014

Year ending	Overnight trips ('000)	Nights ('000)	Average length of stay	Total Wxpenditure in Australia ($000)	Expenditure per visitor ($)
Dec-10	69,297	265,393	3.8	46,217,238	667
Dec-11	71,895	270,573	3.8	48,311,396	672
Dec-12	74,472	281,733	3.8	49,973,731	671
Dec-13	75,796	282,680	3.7	51,481,382	679
Dec-14	81,436	308,908	3.8	54,432,415	668
12-month Real change	5,640	26,228	0.1	2,951,033	-11
12-month Percentage change (%)	7	9	2	6	-2
5-year average growth (%)	3	3	0	3	0

a. All figures relate to Australian residents aged 15 years and over.
Source: Tourism Research Australia, National Visitor Survey

Table 17 Domestic Daytrip Visitors in Australia[a], year ending December 2010 to December 2014

Year ending	Daytrips ('000)	Expenditure ($000)	Expenditure per visitor ($)
Dec-10	155,942	15,417,756	99
Dec-11	161,232	16,435,833	102
Dec-12	173,905	18,199,889	105
Dec-13	164,322	18,275,536	111
Dec-14	164,361	17,969,238	109
12-month Real change	39	-306,298	-2
12-month Percentage change (%)	0	-2	-2
5 year annual average (%)	1	3	2

a. All figures relate to Australian residents aged 15 years and over.
Source: Tourism Research Australia, National Visitor Survey

Table 18 International Visitors to Australia[a], year ending December 2010 to December 2014

Year ending	Visitors ('000)	Visitor nights ('000)	Average length of stay	Total expenditure in Australia ($000)	Expenditure per visitor ($)
Dec-10	5,354	186,226	34.8	17,179	3,209
Dec-11	5,343	196,100	36.7	18,051	3,378
Dec-12	5,589	207,950	37.2	18,781	3,360
Dec-13	5,905	217,026	36.8	19,654	3,328
Dec-14	6,357	222,908	35.1	20,538	3,231
12-month Real change	452	5,882	-2	884	-98
12-month Percentage change (%)	8	3	-5	4	-3
5-year average growth (%)	3	4	0	4	0

a. All figures relate to International Visitors aged 15 years and over.
Source: Tourism Research Australia, International Visitor Survey

Table 19 Outbound trips by Australian residents[a], nights and expenditure, year ending September 2014

Year ending	Outbound Trips ('000)	Nights on trip ('000)	Average length of stay	Expenditure ($000)	Expenditure per visitor ($)
Sep-10	6,172	124,935	20.2	35,750,003	5,792
Sep-11	6,799	139,062	20.5	40,697,992	5,986
Sep-12	7,192	145,666	20.3	43,670,976	6,072
Sep-13	7,629	154,858	20.3	47,465,562	6,222
Sep-14	8,097	162,710	20.1	47,144,405	5,822
12-month Real change	468	7,852	0	-321,157	-399
12-month Percentage change (%)	6	5	-1	-1	-6
5-year average growth (%)	6	5	0	6	0

a. All figures relate to Australian residents aged 15 years and over.
Source: Tourism Research Australia, National Visitor Survey

10. Data Sources and Timeline of Release:

Source	Data/Publication	Release Frequency
BITRE Transport Statistics	International Airline Activity - Time Series - City Pairs Data http://www.bitre.gov.au/publications/ongoing/international_airline_activity-time_series.aspx	Monthly
Brisbane Airport	Passenger Statistics http://www.bne.com.au/corporate/media-centre/passenger-statistics	Monthly
Bureau of Meteorology	Rainfall Data (Southport Station) http://www.bom.gov.au/climate/data/	Monthly
Deloitte Access Economics	Tourism and Hotel Market Outlook http://www2.deloitte.com/au/en/pages/consumer-business/articles/tourism-hotel-outlook.html	Biannual
Gold Coast Airport	Gold Coast Airport Passengers http://goldcoastairport.com.au/corporate/statistics/	Monthly
Nielsen	Consumer Confidence Q4/2014 http://www.nielsen.com/au/en/insights/reports/2015/q4-2014-consumer-confidence-report.html	Quarterly
Smith Travel Research	Hotel Survey, Gold Coast (Gold Coast Tourism)	Quarterly
Spence Consulting	Griffith University's Business Confidence Index	Quarterly
Tourism Australia	Tourism Australia Aviation Quarterly Market Updates http://www.tourism.australia.com/statistics/8696.aspx	Quarterly
Tourism Research Australia	Regional Forecasts http://www.tra.gov.au/publications-list-State-tourism-forecasts-2014-2014.html	Annual
Tourism Research Australia	Tourism Forecasts http://www.tra.gov.au/publications/forecasts-Tourism-Forecasts-Autumn-2014.html	Biannual
Tourism Research Australia	Australian Residents' outbound trips – NVS release http://www.tra.gov.au/statistics/Australians-travelling-overseas.html	Quarterly
TRA/GCCC	Domestic Overnight Tourism – NVS release Overnight trips in Australia by residents http://www.tra.gov.au/statistics/domestic-travel-by-australians.html	Quarterly
TRA/GCCC	Daytrip Tourism – NVS release	Quarterly
TRA/GCCC	International Tourism – IVS release	Quarterly
Tourism and Transport Forum	Mastercard Sentiment Survey http://www.ttf.org.au/Content/sentimentsurvey.aspx	Quarterly
UNWTO	World Tourism Barometer & Statistical Annex	Quarterly