

GC2018 VISITOR STUDY

GOLD COAST 2018 COMMONWEALTH GAMES

EVALUATION REPORT



Acknowledgements

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**Culture
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Gold Coast
2018

XXI Commonwealth Games



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1.0

GC2018 at a Glance

Evaluation

13,780

Survey responses collected from GC2018 attendees

3 Distinct user groups surveyed



Spectators



Volunteers



Media

The Program

12 Days 

4 Event Cities 

17 Sporting Venues 

18 Sports 

7 Para Sports 

553 Festival Events 

Attendance

1.2 million

Sporting tickets sold*

331,000

Visitors to ticketed sporting events

159,000

Visitors to non-ticketed sporting events

274,000

Visitors to Festival 2018 events

Participation

14,700

Volunteers*

6,600

Athletes and team officials*

2,150

Games family*

35,000

Workforce*

1,200

Technical officials*

1,800

Trade 2018 business delegates*

4,500

Accredited and non-accredited media*

Unique Visitor Origins

378,000

Day-trippers and locals

48%
Live Locally



168,000

Domestic overnight visitors

29%
Live Elsewhere in QLD



45,500

Overseas Visitors

15%
Live Interstate



8%
Live Overseas



Behaviour

- 4** Sporting sessions attended per person on average
- 3** Artforms attended per person on average
- 7** Nights stayed on average
- 8** Nights stayed in other parts of Queensland on average
- 4** People travelled together on average
- 58%** Of overseas visitors visited other parts of Queensland
- 30%** Of interstate visitors visited other parts of Queensland
- 15%** Of intrastate visitors visited other parts of Queensland

Experience

- 93%** Overall sporting event experience rated as excellent or good
- 87%** Volunteering experience rated as excellent or good
- 85%** Festival 2018 experience rated as excellent or good
- 92%** Rated event city as an excellent or good place to visit
- 87%** Likely or very likely to return to event city visited
- 85%** Likely or very likely to recommend event city to others

Legacy

- 75% agree** That the Gold Coast is growing into a world-class city with distinct strengths
- 440,000** Expected post-Games visitors (returns and recommendations)

- 61%** Of volunteers feel more confident about doing new things
- 55%** Of volunteers gained new skills

Expenditure

\$72 million

In ticket sales*

\$4.6 million

In estimated direct expenditure by non-ticketed sports attendees

\$11.7 million

In estimated direct expenditure by other visitor groups

\$67 million







In estimated direct expenditure from travel to other parts of Queensland

\$300 million

Overall contribution to Queensland economy from GC2018

\$145 million

In direct expenditure from volunteers, ticketed sport and Festival 2018 visitors

- **\$46 million** 
Accommodation expenditure
- **\$42 million** 
Food and beverage expenditure
- **\$15 million** 
Transport expenditure
- **\$9 million** 
Tours and entertainment expenditure
- **\$19 million** 
Retail expenditure
- **\$12 million** 
Merchandise expenditure#

* Sourced from GOLDOC and Games Partner reporting. All other figures are derived from survey results.

Refers to spend on merchandise related to GC2018. This only includes spend by visitors to the Games during their trip to the Games (the relevant in-scope expenditure for this assessment). It does not represent total merchandise sold across the Games.

2.0

GC2018 Evaluation

2.1 Background

In 2017, the Office of the Commonwealth Games commissioned Culture Counts to design and implement an evaluation approach for the Gold Coast 2018 Commonwealth Games (GC2018), to measure the experience and expenditure of visitors attending the Games.

The project established an impact assessment framework and evaluation methodology that enabled consistent measurement across a broad range of visitor types and activities occurring in the four GC2018 event cities across Queensland – Gold Coast, Brisbane, Cairns and Townsville.

This report contains the findings of an extensive program of primary research led by Culture Counts, including 13,780 online and intercept survey responses collected from public attendees and volunteers.

The resulting dataset represents a very large sample of spectator and stakeholder feedback, generating statistically significant findings for the Games as a whole, and enabling useful insights into the experience of different visitor types and more detailed sub-groups in each event city. A series of transparent expenditure assumptions are described in the report, and calculations have been carried out to determine the overall expenditure impact of the Games based on patterns identified in the survey analysis.

The following pages include key insights about the experience of the Games for visitors; its reach across demographics; and the ability of the Games to achieve strong levels of economic and tourism impact.

2.2 Evaluation Methodology

The methodology for evaluating the experience and expenditure of Commonwealth Games visitors involved four key components:

1. Evaluation planning
2. Survey development
3. Evaluation coordination
4. Visitor behaviour and expenditure analysis

This section briefly details the processes and tasks involved in delivering each component.

1. Evaluation planning

A detailed plan for how, where, when and from whom visitor expenditure data would be collected was required. This involved a series of visitation assumptions based on prior visitor forecasts and understanding of the program; proposed sampling techniques based on the type and mix of data required to complete the analysis; recommended data collection techniques to minimise costs, achieve significant survey samples and reduce the time burden on respondents; and a survey set up methodology designed to collect the required data in a streamlined and effective manner.

Assumptions

It was assumed that visitors would attend sporting events, Festival 2018 events, or both. In order to correctly show the overall impact of the Games experience, it was necessary to collect experience and expenditure data from visitors to all parts of GC2018 (not just sporting events). It was assumed that the majority of non-local visitors would be

attending sporting events, and that people just attending Festival 2018 events were more likely to be local residents or people from within the south-east Queensland region.

Sample size

Assuming that each visitor type has a different spend profile (based on different behaviours and length of stay), it was necessary to collect data from a significant sample of each visitor type. To verify spend assumptions, a significant sample is required to give confidence that the average results recorded from the sample are representative of the wider population.

Target sample sizes were identified based on Griffith University visitor forecast estimates, initial ticket sales data from Gold Coast 2018 Commonwealth Games Corporation (GOLDOC), and estimated festival visitor numbers provided by each event city. In order to analyse sub-groups (e.g. identify any differences in impact, experience or behaviour by demographic), a significant sample of each sub-group was also required. This was factored in to increased overall sample targets in the absence of forecasts of sub-group visitor numbers.

Survey methods

Due to the range of activities comprising GC2018 and the need to collect data from each visitor type, a selection of different survey distribution methods was required. Surveying ticketed sporting event attendees by sending an email to them via the GOLDOC ticketing database was identified as the most direct and least resource-intensive method, however the database did not contain contact information for ticket buyers living overseas. This meant that intercept interviewing was also necessary in order to collect responses from overseas visitors to GC2018. Additionally, the majority of Festival 2018 events were non-ticketed, meaning that intercept interviews were

also necessary for collecting responses from people attending festival events only.

The in-scope visitor groups for the surveys included:

- Ticketed sporting event attendees
- Festival 2018 attendees
- Non-accredited media registered for the Gold Coast Media Centre (Note: these 'non-accredited media' attendees are separate from the 'GC2018 accredited media' predominately covering the sporting events)
- GC2018 volunteers

Responses from attendees to non-ticketed sporting events were also captured through surveys sent to the ticketing database and intercept interviews at Festival 2018 hubs, however this group was not specifically targeted due to constraints regarding surveying at sporting events. Further groups such as athletes, team officials, accredited media and workforce were proposed to be included in the scope of the evaluation, but were excluded following advice from GOLDOC due to restrictions on sharing contact details and concerns about the appropriateness (and likely success) of survey approaches.

For the in-scope visitor groups, the following survey methods were implemented:

- An email survey was sent to 25% of the sporting event ticketing database (equating to 25,000 people), containing a comprehensive set of experience and expenditure questions, and several questions about Festival 2018 for those who had attended both. A slightly modified version of the survey was prepared for each event city (Gold Coast, Brisbane, Cairns and Townsville), and sent to ticket buyers based on the city in which they had attended Games sporting events.

- Intercept interviews were carried out in the Gold Coast and Brisbane during the Games period using a hired field team to collect experience and expenditure data from a more representative mix of visitor types (including overseas visitors not captured through the email survey).
- Intercept interviews were carried out by volunteers in the key Festival 2018 hubs of each event city, collecting Festival 2018 impact data along with a smaller selection of visitor behaviour and expenditure statistics. Volunteers were given interview training by Culture Counts staff and overseen by event city supervisors to ensure a consistent collection method was used and a broad mix of demographics approached that represented the overall visitor population.
- Intercept interviews were also carried out by volunteers at several major Festival 2018 events/activities, including questions about both the impact of the individual event and Festival 2018 as a whole. This included surveys for Bleach* Festival (Gold Coast), Women of the World Festival (Brisbane), Meeanjin Markets (Brisbane), One Million Stars to end Violence (Brisbane), Beginnings (Cairns) and Mixed Blood (Cairns).
- Social media surveys were posted on the Festival 2018 and Embracing 2018 Facebook pages, targeting general Festival 2018 attendees across each of the event cities.
- An email survey was sent to the ticketing database for a small number of Festival 2018 events that were ticketed.
- An email survey was sent to the full database of GC2018 volunteers, containing behaviour, expenditure and experience questions.
- An email to non-accredited media attendees registered for the Gold Coast Media Centre was sent via the City of Gold Coast, containing behaviour, expenditure and experience questions.

Figure 1 shows the number of survey responses collected for each survey and method, equating to a total sample of 13,780 responses across GC2018.

Figure 1: Survey responses collected

SURVEY	RESPONSES
Visitor experience and expenditure email survey	3,835
Visitor experience and expenditure intercept survey	1,830
Volunteer experience and expenditure survey	4,174
Non-accredited media survey experience and expenditure survey	132
Festival 2018 Gold Coast intercept survey	1,234
Festival 2018 Brisbane intercept survey	659
Festival 2018 Cairns intercept survey	311
Festival 2018 Townsville intercept survey	597
Festival 2018 Social Media survey	206
Women of the World Festival intercept survey	232
One Million Stars Installation intercept survey	190
Meeanjin Markets intercept survey	215
Beginnings ticketing database email survey	136
Mixed Blood intercept survey	29
Total	13,780

2. Survey development

The design of survey questions, structure and target groups was agreed with Games partners and the online surveys were prepared in the Culture Counts digital platform. This component of the evaluation methodology involved:

- Development of survey questions to collect data on:
 - Visitor demographics
 - Visitor behaviour
 - Visitor expenditure
 - Visitor experience
 - Festival experience (if applicable)
- Preparation of targeted surveys for different respondent groups (public, volunteers, media, artists, peers)
- Structuring of surveys with logic to ensure only relevant questions were asked of respondents (e.g. only respondents residing outside the local area were shown questions related to nights stayed and accommodation type and expenditure.
- Omnibusing survey questions in intercept surveys to reduce survey length (e.g. half of all survey respondents were asked a selection of two spend questions, while the other half were asked a different selection of two spend questions). This was designed to keep intercept surveys under 3 minutes in length to complete while also collecting enough data for each question to enable representative analysis.
- Review of survey inclusions and structure by OCG staff and GC2018 partners
- Preparation of paper surveys as a back-up to digital surveys for Cairns and Townsville in the event of internet connection issues.

The full set of survey questions contained in the Visitor Experience and Expenditure email survey can be found in Appendix A.

3. Evaluation coordination

Culture Counts coordinated and supervised the evaluation process to ensure that the relevant samples were collected from each respondent group and location. This involved:

- Delivering volunteer training and providing interview guidance and resource materials to each event city for Festival 2018 intercept surveying,
- Hiring and managing a field team to collect visitor experience and expenditure survey responses from sporting event and Festival 2018 attendees in the Gold Coast and Brisbane (with a focus on international visitors not captured through the GC2018 ticketing database),
- Monitoring response rates for each survey and event city and reporting daily to OCG, updating targets and providing guidance to event cities on collecting significant samples,
- Coordinating the mailout of email surveys to the spectator ticketing database, volunteers, media, cultural organisations and peer assessors, monitoring response rates and sending reminders.

Following the completion of the Games period, survey responses were collected from all respondent groups until 7th May, after which surveys were closed to enable analysis to begin.

4. Visitor behaviour and expenditure analysis

Survey responses were analysed to identify learnings and insights into the behaviour, experience and expenditure patterns of GC2018 visitors. Analysis involved:

- Primary data collected from surveys was used to identify the percentage of visitors falling within each category (local, regional, interstate, international), and the behaviour (nights stayed, sports attended, people attended with) and spend patterns of each visitor category.
- A mix of primary and secondary data was used to estimate unique visitor numbers for in-scope groups. As Festival 2018 attendees and sporting event spectators attended multiple events, ticket sales and crowd estimates counted the same visitors multiple times. As survey questions asked respondents to provide spending estimates for their overall Games experience (not per event attended), it was necessary to calculate unique visitor numbers in order to accurately apply spending by individuals to the wider visitor population. The following data was used to estimate unique visitor numbers:
 - Total ticket sales numbers provided by GOLDOC
 - Split of ticket sales by location of residence provided by GOLDOC (domestic ticket buyers only)
 - International visitor ticket sales assumptions
 - Average events attended by visitor category from surveys
 - Total Festival 2018 attendance estimates by cities (from crowd counts)
- Unique Festival 2018 visitor estimates from sensors deployed in five Gold Coast locations (picking up unique mobile phone WiFi signals)
- Split of sport and Festival 2018 attendance from survey responses (percentage of respondents who attended sport only, Festival 2018 only or both)
- Split of visitor type (based on location of residence) from survey sample
- In order for visitor spending to contribute to the economic impact of GC2018, attending sporting or Festival 2018 events had to be the primary reason for visitation. A question was included in all surveys asking respondents whether attending the Games or Festival 2018 was the primary reason for their visit to the event city or their visit to the local area (in the case of residents). This generated an additionality percentage, counting only the percentage of expenditure that was additional to the economy and would not have otherwise occurred without the Games.
- The analysis identified that visitors to sports had different behaviours and spend patterns to those who attended Festival 2018 events, or those who attended both. Segmenting these groups enabled more accurate application of spending assumptions to the wider visitor population. Media and volunteers also had different behaviours and spend patterns to general spectators. Average behaviour and average spend figures for each visitor category derived from survey data were applied to the estimated number of unique visitors in each category to calculate the overall expenditure contribution associated with GC2018.

- Although athletes and team officials were not directly surveyed, reliable unique visitor figures including location of residence were provided, and their spend patterns could be estimated based on assumptions derived from other user groups with similar behaviour. For this purpose, they have been included in the expenditure analysis.
- Although accredited media were not directly surveyed, their behaviour and spend patterns have been estimated based on survey responses from unaccredited media, and have therefore been included in the overall expenditure analysis.

All analysis has been carried out in a transparent and rigorous way, and further details about assumptions and methods can be accessed as required by Games delivery partners via analysis workbooks.

Gold Coast Unique Visitor Calculations

In order to determine the number and split of unique visitors to the Gold Coast, the following data, assumptions and methods were used:

- The total Gold Coast ticket sales figure of 1.15 million was provided by GOLDOC, in addition to the percentage split of sales by location of residence (for domestic ticketbuyers only)
- An assumption that 10% of tickets were purchased by overseas visitors was applied
- The number of tickets sold was divided by the average number of sporting events attended (captured from the survey) by each visitor type (local, regional, interstate, overseas), in order to determine unique visitor estimates by visitor category for sporting events
- The survey sample was used to determine the percentage of sports visitors who attended sport only, or who attended both sport and Festival 2018 events
- The survey sample was used to calculate the percentage of Festival 2018 attendees who also attended sport, and therefore determine the total number of Festival 2018 visitors based on the total estimated sporting visitors
- Estimated unique Festival 2018 visitor numbers were checked against figures captured through sensors located in Gold Coast Festival 2018 hubs and total festival attendance statistics provided by GOLDOC and Festival 2018 partners
- Total unique visitors were split into visitor type categories (location of residence) based on the percentage split derived from the survey sample.

3.0

GC2018 Visitor Estimates

Visitor groups that were surveyed ('in-scope visitors') include:

- Ticketed sporting event attendees
- Festival 2018 attendees
- Non-accredited media registered for the Gold Coast Media Centre
- GC2018 volunteers

On advice from GOLDOC, a selection of other visitor groups was not surveyed, however estimated attendance numbers were provided from the Transport Operations Plan released by GOLDOC in June 2017. These include:

- Athletes and team officials - 6,600
- Technical officials - 1,200
- Games Family members from the CGF, Commonwealth Games Associations (CGAs) and International Federations (IFs) of sporting bodies - 2,150
- Workforce - 35,000
- Accredited media - 3,500

Evaluation results for the *Trade 2018 Games Time Trade and Investment Program* show 1,800 business delegates attended these events.

172,500 total attendances were recorded for non-ticketed sporting events, including Triathlon, Race Walk, Cycling, Mountain Bike and Marathon. It is estimated that this equated to 159,000 visitors (each attending 1.08 non-ticketed events on average). The majority of these visitors also attended ticketed sports, leaving an estimated 73,700 visitors to non-ticketed sports only. More detail on these calculations can be found in Section 7.7.

The split of visitors to sporting and Festival 2018 events has been determined using survey results applied to known ticketing data. Figure 2 demonstrates the split of 'in-scope visitors' based on their attendance at sporting events and Festival 2018 events. Data is provided for each of the four event cities.

Figure 2: Estimated in-scope visitors by attendance

VISITORS BY CATEGORY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Attended sport	304,820	14,840	6,218	5,575	331,452
Attended festival	166,761	59,558	29,303	19,168	274,789
Attended both sport and festival	133,623	9,993	5,755	5,231	154,601

Figure 3 provides an alternative view of the split of in-scope visitors, based on their visitation behaviour. The split is derived from survey responses, in which respondents were asked where they live and whether they stayed overnight in the event city as part of their visit. The figure includes all in-scope visitors as well as athletes and team officials. Figures 4 and 5 show the split for all visitor groups (including in-scope visitors, other visitors and non-ticketed sport visitors).

Figure 3: Estimated unique in-scope visitors by location of residence and behaviour

VISITOR NUMBERS	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Day trippers/local residents	188,193	51,499	24,670	17,936	282,299
Domestic overnight visitors	143,539	6,287	2,486	1,039	153,352
Overseas visitors	30,315	8,380	2,610	536	41,842
Total	362,048	66,167	29,766	19,512	477,492

Figure 4: Estimated total visitors by location of residence and behaviour

VISITOR NUMBERS	IN-SCOPE VISITORS	OTHER VISITORS*	NON-TICKETED SPORT	TOTAL
Day trippers/local residents	282,299	21,759	73,690	377,748
Domestic overnight visitors	153,352	14,706		168,057
Overseas visitors	41,842	3,685		45,527
Total	477,492	40,150	73,690	591,332

* Other visitors includes athletes and team officials, technical officials, Games Family members, workforce, accredited media and Trade 2018 delegates.

Figure 5: Estimated visitor numbers from all groups

VISITOR TYPE	NUMBER OF VISITORS
Ticketed sport and Festival 2018 attendees (unique)	451,640
Volunteers	14,752
Accredited and non-accredited media	4,500
Athletes and team officials	6,600
Non-ticketed sports attendees	73,690
GC2018 Workforce	35,000
Technical Officials	1,200
Games Officials	2,150
Trade 2018 Delegates	1,800
Total	591,332

An estimated total of 591,332 visitors attended or participated in GC2018 across nine categories. Of these, 64% were locals or day-trippers, 28% were domestic overnight visitors, and 8% were overseas visitors.

4.0

GC2018 Visitor Demographics

42% Of public attendees **lived locally**

25% Of public attendees **aged 40-49** (largest age cohort)

19% From **diverse backgrounds** (non-English speaking, Aboriginal or Torres Strait Islander, person with a disability, LGBTIQ)

46% Attend or participate in **arts activities** several times a year

63% Of **overseas visitors** had not visited the event city before

The insights contained in this section of the report are based on statistics for public visitors to sporting events or Festival 2018 events, in order to represent GC2018 visitors as a whole. The demographics,

behaviour and experience of other groups (volunteers, athletes, media, officials, Games Family and workforce) are not included in the following charts and tables. A detailed examination of the volunteer cohort is contained in Section 7 of the report.

Each table contains visitor demographics for each of the four event cities (derived from specific surveying that took place in each city) and for GC2018 as a whole.

All survey respondents were asked to identify their location of usual residence at the start of the survey, which influenced whether additional survey questions related to visitor behaviours (such as overnight stay or likelihood of returning) were shown or hidden for respondents. Visitor location of residence is an important driver of behaviour, experience and expenditure, and is used throughout the analysis.

Survey respondents were also asked to provide their gender, age, identity, frequency of arts attendance, and whether they had visited the event city previously. This data helps to understand the demographic makeup of visitors to each event city, and the wider reach and impact of GC2018 amongst diverse groups.

4.1 Location of residence

Figure 6: Location of residence (% split)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	32%	64%	79%	87%	42%
Elsewhere in Queensland	38%	13%	6%	7%	31%
Interstate	23%	8%	6%	2%	19%
Overseas	7%	15%	8%	3%	8%
Total	100%	100%	100%	100%	100%

(Q: Which of the following best describes where you usually live?)

Figure 7: Location of residence (estimated total public visitors)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	103,797	40,897	23,662	17,008	185,363
Elsewhere in Queensland	134,016	8,373	1,783	1,391	145,564
Interstate	76,368	5,260	1,920	452	84,000
Overseas	23,777	9,875	2,400	661	36,714
Total	337,958	64,405	29,766	19,512	451,640

4.2 Gender

Figure 8: Gender of public visitors (% split)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Male	36%	30%	26%	28%	34%
Female	63%	67%	70%	71%	65%
In another Way	0%	2%	0%	1%	1%

(Q: How would you describe your gender?)

4.3 Age

Figure 9: Age of public visitors (% split)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Under 20	4%	10%	4%	8%	5%
20-29	10%	22%	13%	15%	12%
30-39	16%	22%	19%	19%	17%
40-49	27%	18%	24%	21%	25%
50-59	22%	14%	23%	16%	21%
60-69	14%	11%	13%	15%	14%
70+	6%	2%	5%	6%	5%

(Q: How old are you?)

4.4 Identity

Figure 10: Identity of public visitors (% split)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Sports fan	73%	42%	34%	48%	65%
Regular arts attendee	6%	35%	37%	48%	14%
Non-English speaking background	4%	14%	9%	4%	6%
Aboriginal and/or Torres Strait Islander	2%	9%	6%	3%	3%
Person with a disability	2%	3%	3%	2%	2%
Caring for someone with a disability	4%	3%	5%	6%	4%
LGBTIQ person	3%	7%	5%	4%	4%
None of the above	18%	18%	25%	19%	19%

(Q: Do you identify as any of the following?)

4.5 Cultural frequency

Figure 11: Frequency of arts attendance of public visitors (% split)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Never or very infrequently	16%	8%	4%	5%	12%
Once a year	18%	10%	8%	12%	14%
Several times a year	46%	41%	48%	55%	46%
Once a month	15%	26%	26%	20%	19%
Once a week	3%	11%	11%	6%	6%
More than once a week	2%	4%	3%	2%	2%

(Q: Approximately how often do you attend or participate in arts and cultural events/activities?)

4.6 Prior visit

Figure 12: Percentage of public visitors who have visited the event city previously

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	n/a	n/a	n/a	n/a	n/a
Elsewhere in Queensland	100%	100%	-	100%	100%
Interstate	95%	78%	67%	50%	95%
Overseas	37%	50%	0%	-	37%

Note: The sample of responses for Cairns and Townsville visitors was too small to be significant

(Q: Have you visited the Gold Coast/Brisbane/Cairns/Townsville before?)

The majority of GC2018 survey respondents in each event city lived locally, except for the host city, Gold Coast in which a larger percentage travelled from other parts of Queensland to attend sports and Festival 2018 events. Local attendance was particularly strong in Townsville (87%) and Cairns (79%), with limited sports sessions to attract interstate and overseas visitors.

Females represented the greatest percentage of survey respondents across all event cities, with an average of 65% female public visitors to GC2018 sports or Festival 2018 events as a whole. Interviewers were encouraged to approach respondents of all demographics to ensure survey responses were representative of the attendee population, however it is a known trend that females are more likely to respond to survey requests.

A mix of age cohorts was in attendance across GC2018, with the largest percentage of respondents aged 40-49 (25%) and 50-59 (21%). Brisbane attracted a larger percentage of younger age cohorts, which is expected to be a result of its Festival 2018 programming.

Respondents of diverse backgrounds and identities were present across the event cities, with an average of 3% Aboriginal and/or Torres Strait Islander, 6% with disability or caring for someone with disability, and 6% from non-English speaking backgrounds.

Respondents from all event cities were most likely to attend arts and cultural events several times a year. As a greater proportion of surveys in Brisbane, Cairns and Townsville were collected from Festival rather than sports attendees, respondents in these cities recorded higher rates of arts attendance than respondents in the Gold Coast.

100% of visitors to GC2018 events who lived in other parts of Queensland had attended the event cities previously. Almost all interstate visitors had also been to the Gold Coast previously, compared with just 37% of overseas visitors. This indicates that GC2018 was a successful driver of both new and repeat visitation.

5.0

GC2018 Visitor Behaviour

4 Sporting sessions attended on average

4 People travelled together on average

7 Nights stayed on average

76% Of visitors stayed overnight as part of their visit

34% Stayed in hotel/motel in the Gold Coast

81% Used the GC2018 website when planning their travel in the Gold Coast

58% Of overseas visitors to the Gold Coast also visited other parts of Queensland

Survey respondents were asked a series of questions about their visit to identify trends and patterns in the behaviour of different visitor categories. Trends (such as average nights stayed) are used to inform total visitor expenditure calculations.

When analysing number response questions from the survey data (such as the number of sporting events attended, the number of nights stayed in the event city, or the amount of money spent on various categories), certain measures were taken to ensure that large outliers did not incorrectly skew the results. This involved removing any question responses that were more than three standard deviations from the mean score recorded by the sample.

5.1 Sessions attended

Figure 13: Average number of sports attended by public visitors

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	3	2	3	3	3
Elsewhere in Queensland	3	4	n/a	4	3
Interstate	5	3	3	4	4
Overseas	7	6	n/a	n/a	6
Average	4	2	3	3	4

(Q: How many sporting events did you attend?)

Figure 14: Average number of people attended with

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	3	4	4	3	3
Elsewhere in Queensland	3	3	3	4	3
Interstate	3	3	2	4	3
Overseas	3	3	2	n/a	2
Average	3	3	3	3	3

(Q: How many people were in your travel party (excluding yourself)?)

On average, respondents attended four sporting event sessions during their GC2018 visit, with overseas visitors attending an average of six sessions and locals attending an average of three.

Group size did not vary much across the event cities and visitor types, with respondents citing an average of three people (plus themselves) in their travel parties. Locals were more likely to attend in slightly larger groups than interstate and overseas visitors.

5.2 City stay

Respondents identifying as local residents in the surveys were not asked questions about staying overnight, length of stay or accommodation used. This is represented by n/a in the tables below. All other visitors (intrastate, interstate and overseas) were asked whether they stayed overnight as part of their visit, how many nights they stayed in the local area during their visit, the type of accommodation used in the local area as part of their visit, and the sources of information used to plan their visit. As only small proportions of Cairns and Townsville respondents were from interstate and overseas, significant data was not collected from these visitor categories for some questions.

Figure 15: Percentage of public visitors that stayed overnight

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	n/a	n/a	n/a	n/a	n/a
Elsewhere in Queensland	40%	46%	86%	79%	63%
Interstate	79%	89%	95%	78%	85%
Overseas	87%	83%	97%	86%	88%
Average	59%	71%	94%	81%	76%

(Q: Did you stay overnight in the Gold Coast/Brisbane/Cairns/Townsville as part of this visit?)

Figure 16: Average nights stayed by public visitors

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	n/a	n/a	n/a	n/a	n/a
Elsewhere in Queensland	6	3	4	4	4
Interstate	8	5	6	7	7
Overseas	10	11	6	2	7
Average	8	8	6	6	7

Note: The sample of responses from overseas visitors for Townsville was too small to be significant

(Q: How many nights did you stay in the Gold Coast/Brisbane/Cairns/Townsville as part of this visit?)

Figure 17: Accommodation used by public visitors

EVENT CITY	GOLD COAST	BRISBANE
Hotel/motel	34%	50%
Bed and breakfast	2%	8%
Holiday house or unit	28%	8%
Caravan or camping	5%	0%
Backpacker or hostel	1%	0%
House of a friend or relative	31%	25%
Other	6%	8%

Note: The sample of responses for Cairns and Townsville was too small to be significant for this question

(Q: What type of accommodation did you use during your stay?)

Figure 18: Sources of tourism information used by public visitors

EVENT CITY	GOLD COAST	BRISBANE
GC2018 website	81%	61%
GC2018 email communications	49%	25%
Queensland tourism website	7%	22%
Travel agent	6%	14%
Hotel booking websites	29%	25%
Airbnb website or app	12%	11%
Other website or app	15%	14%
TV advertising	5%	3%
Magazine or newspaper advertising	3%	3%
Airline	15%	33%
Facebook	8%	3%
Recommendations from friends or family	26%	22%
None of the above	6%	6%

Note: The sample of responses for Cairns and Townsville was too small to be significant for this question

(Q: What sources of information did you use to plan your visit to Queensland?)

Across all event cities, an average of 76% of visitors indicated that they stayed overnight. As expected, the highest percentages of overnight visitors came from overseas and interstate, with some visitors from other parts of Queensland making day trips only. This was most prominent in the Gold Coast, with visitors from other parts of South East Queensland travelling to GC2018 events but not staying overnight.

On average, visitors spent seven nights away from home as part of their GC2018 visit. As expected, overseas visitors to the Gold Coast and Brisbane stayed longer, due to the greater distance travelled and larger number of events attended.

The most common form of accommodation used was hotel/motel, however many Gold Coast visitors also stayed at the house of a friend or relative, or a holiday house or unit. Half of all Brisbane visitors stayed in a hotel or motel.

5.3 Other travel

Respondents who did not live locally were asked whether they travelled to other parts of Queensland and other parts of Australia during their visit, and how many nights they stayed. This helps to identify the broader tourism impact of GC2018 for the state and country.

Only respondents who indicated they had travelled to other parts of Queensland were asked to identify the different Queensland regions that they visited. Figure 19 shows the different regions visited by those respondents who travelled to other parts of Queensland.

Due to the small percentages of non-locals, the sample of responses to the following questions from visitors to Brisbane, Cairns and Townsville were too small to be meaningful. Results for visitors to sporting and Festival 2018 events on the Gold Coast only are included below.

Figure 19: Gold Coast visitors who travelled to other parts of Queensland or Australia

LOCATION OF RESIDENCE	% VISITED OTHER QUEENSLAND	% VISITED OTHER AUSTRALIA
Local	n/a	n/a
Elsewhere in Queensland	15%	9%
Interstate	30%	20%
Overseas	58%	59%

Note: this does not equate to 100% as some respondents visited both other parts of Australia and other parts of Queensland.

(Q: As part of this trip, did you visit any of the following locations?)

Figure 20: Other locations in Queensland visited

LOCATION VISITED	% VISITED
Brisbane	77%
Sunshine Coast	47%
Townsville	11%
Cairns	21%
Other Tropical North Queensland	16%
Whitsundays (Airlie Beach, Mackay, Whitsunday Islands)	19%
Central Queensland (Rockhampton, Bundaberg)	13%
Fraser Coast (Fraser Island, Hervey Bay, Maryborough)	19%
Southern Queensland Country (Toowoomba, Stanthorpe, Kingaroy, Roma)	19%
Outback Queensland	13%

(Q: Did you (or will you) visit any of the following locations in Queensland?)

Figure 21: Average nights stayed in other locations by public visitors

GOLD COAST VISITORS	NIGHTS STAYED IN QUEENSLAND	NIGHTS STAYED IN AUSTRALIA
Local	n/a	n/a
Elsewhere in Queensland	8	15
Interstate	6	10
Overseas	8	13
Average	8	14

(Q: How many nights did you (or will you) spend in other parts of Queensland/Australia?)

More than half of all overseas visitors who came to the Gold Coast for GC2018 also visited other parts of Queensland and Australia. Just under one third of interstate visitors travelled to other parts of Queensland during their visit.

Brisbane was the most visited destination, with many likely to have flown in and out of Brisbane airport. 47% also visited the Sunshine Coast, 21% visited Cairns, and fewer than 20% visited regions further afield. Those who travelled to other locations in Queensland visited an average of two cities or regions in addition to the Gold Coast.

On average, visitors spent eight nights in other parts of Queensland, and 14 nights in other parts of Australia. Figure 55 is used to calculate the estimated expenditure of visitors in other parts of Queensland in Section 7.10.

6.0

GC2018 Visitor Experience

93% Of visitors had an **excellent or good experience** at GC2018 sporting events

6 Reasons given for positive experience on average

92% Rated the event city as **excellent or good to visit**

87% Likely or very likely to return to event city visited

85% Likely or very likely to recommend event city to others

Survey respondents were asked a series of questions about their experience at GC2018 sporting events, Festival 2018 events, and in the event or host city as part of their visit. This provides feedback to Commonwealth Games organisers that can be used to inform future Games. It also provides an indication of the tourism legacy benefits of the Games for the event and host cities, based on the quality of visit and likelihood of visitors to return or recommend to others.

Figure 22: Rating of overall experience at sporting events by public visitors

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Excellent	64%	59%	50%	50%	64%
Good	29%	36%	29%	21%	29%
Average	5%	5%	14%	21%	5%
Poor	1%	0%	7%	7%	1%
Very Poor	1%	0%	0%	0%	1%

(Q: How would you rate your overall experience attending the sporting events?)

6.1 Overall rating

All survey respondents were asked to provide an overall rating of their experience attending sporting events as part of GC2018 in each respective city. Respondents who had an excellent or good overall experience were asked to list the main factors contributing to their positive experience. Respondents who had a poor experience were asked to list the main factors contributing to their negative experience. A multiple choice list of factors was provided and respondents could choose as many as they required. Respondents could also provide a description of other factors contributing to their experience in a free text box.

As there were smaller numbers of sporting event attendees in Cairns and Townsville, the sample of responses for these questions is very small.

Figure 23: Factors influencing positive experience of public visitors

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Sporting performance	61%	43%	57%	71%	60%
Ticketing and entry arrangements	50%	36%	64%	71%	50%
Seating/ viewing position and comfort	49%	28%	86%	71%	48%
Transport	49%	33%	7%	21%	48%
Crowd entertainment and enthusiasm	49%	31%	57%	64%	48%
Venue amenities	41%	29%	71%	43%	41%
Safety and security arrangements	38%	28%	50%	21%	38%
Provision of information and assistance	37%	20%	43%	29%	37%
Food and beverage options	15%	15%	50%	21%	15%
Respect shown for Aboriginal and Torres Strait Islander culture	15%	9%	7%	14%	15%
Other	3%	1%	0%	0%	3%

(Q: You rated your overall experience as excellent or good, what were the main factors contributing to this experience?)

On average, respondents rating their experience as excellent or good selected six positive factors from the list of options.

Some examples of other positive factors specified included:

- With a recent broken ankle, walking with a crutch, I was continually assisted as a person with disability to avoid walking too far or standing queueing, this made my experience so much easier
- The positive attitude of volunteers/shapers, police and security
- Flow of public traffic was good
- The app was invaluable
- The help the volunteers gave us at each venue was outstanding
- There was a foundation of well executed plans of making the transport and entry to the venues easier as a less mobile or disabled person. There were a few mishaps/rude people that let the perfect flow down, however overall it made the process doable and as a less mobile person that is good enough for me!
- The inclusion of disabled athletes. It was so inspirational watching them compete and thrive on the crowds cheering them on
- Borobi - the best mascot in the history of the universe
- Having a son with Autism, the crowd controllers and volunteers were very helpful and understanding
- The volunteers were fantastic in providing direction, generating a vibe of enthusiasm and excitement at every venue visited
- Overall experience of watching the game - excellent planning to have it organised, and everything needed between leaving home and returning after watching the game was amazing
- Athlete performances, volunteer enthusiasm, cleanliness of venues
- Toilet amenities were not just excellent, they were extraordinary. The toilets were 100% clean and nice smelling. I have never encountered this at any event ever. Awesome job.

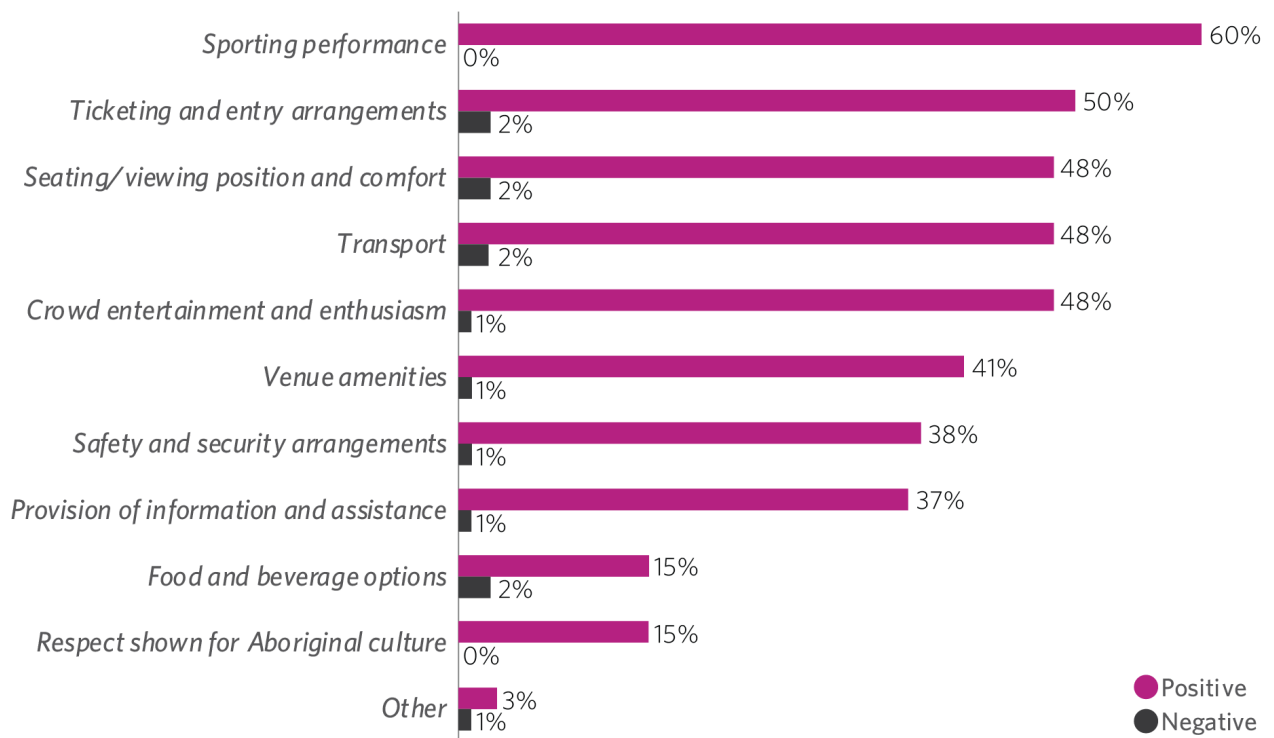
Figure 24: Factors influencing negative experience of public visitors

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Ticketing and entry arrangements	2%	1%	7%	14%	2%
Seating/ viewing position and comfort	2%	3%	7%	14%	2%
Food and beverage options	2%	3%	0%	29%	2%
Transport	2%	2%	0%	7%	2%
Venue amenities	1%	2%	0%	14%	1%
Safety and security arrangements	1%	0%	0%	14%	1%
Crowd entertainment and enthusiasm	1%	2%	7%	21%	1%
Provision of information and assistance	1%	0%	0%	7%	1%
Other	1%	0%	0%	0%	1%
Sporting performance	0%	0%	0%	0%	0%
Respect shown for Aboriginal and Torres Strait Islander culture	0%	0%	0%	0%	0%

(Q: You rated your overall experience as poor or very poor, what were the main factors contributing to this experience?)

As only 2% of respondents overall said they had a poor experience at the sporting events, percentages of negative factors identified were very small. Two reasons were given on average for negative experiences, with the positive clearly outweighing the negative across all factors. Figure 25 contains a comparison of responses for each factor contributing to the GC2018 sporting experience.

Figure 25: Overall GC2018 experience factors compared



6.2 City experience

Visitors from overseas, interstate and intrastate were asked questions about each event city as a place to visit, their likelihood of returning and their likelihood of recommending the city to friends and family. Respondents identifying as local residents were not asked these questions. The following tables contain results from overseas, interstate and intrastate visitors only.

Figure 29 contains future visitation estimates derived from likelihood of return and likelihood to recommend data. This assumes that one additional person visits as a result of recommendation/encouragement by Games time visitors, and all visitors who indicated they would be likely to return will visit again in the future.

Figure 26: Quality of event city as a place to visit

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Excellent	49%	54%	50%	50%	49%
Good	43%	42%	50%	50%	43%
Average	7%	4%	0%	0%	7%
Poor	1%	0%	0%	0%	1%
Very Poor	0%	0%	0%	0%	0%

(Q: How would you rate the quality of the Gold Coast/Brisbane/Cairns/Townsville as a place to visit?)

Figure 27: Likelihood of return to event city

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Very Likely	66%	65%	75%	50%	66%
Likely	21%	19%	0%	50%	21%
Neutral	7%	10%	0%	0%	7%
Not Likely	3%	6%	25%	0%	3%
Not at all Likely	3%	0%	0%	0%	2%

(Q: How likely are you to visit the Gold Coast/Brisbane/Cairns/Townsville again?)

Figure 28: Likelihood to recommend event city to friends and family

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Very Likely	57%	51%	75%	50%	57%
Likely	28%	37%	25%	50%	28%
Neutral	11%	10%	0%	0%	10%
Not Likely	2%	2%	0%	0%	2%
Not at all Likely	2%	0%	0%	0%	2%

(Q: How likely are you to recommend or encourage others to visit the Gold Coast/Brisbane/Cairns/Townsville?)

Figure 29: Future visitation estimates

VISITORS	NUMBER LIKELY TO RETURN	NUMBER TO VISIT BASED ON RECOMMENDATION	TOTAL FUTURE VISITS
Domestic Visitors	199,237	187,911	387,147
Overseas Visitors	22,142	30,242	52,383
Total	221,378	218,152	439,531

92% of visitors rated the event or host city as an excellent or good place to visit. Only 1% of respondents found the city to be a poor place to visit. No further questions were asked about the factors impacting these ratings.

87% of visitors said they were likely or very likely to return to the city again, and 85% were likely or very likely to recommend the event city to friends and family.

Based on these percentages, it is estimated that over 220,000 visitors are likely to return to the event city, and approximately 218,000 new visitors may travel to the event city on the recommendation of a friend or family. This equates to a potential 440,000 future visitors.

6.3 Cultural experience

All Festival 2018 surveys asked respondents to rate their Festival 2018 arts and cultural experience overall, and the question was also asked of sporting ticketbuyers who indicated that they had attended Festival 2018 events. Respondents were also asked whether they were more likely to attend arts in future following their Festival 2018 experience. This provides an indication of the legacy impact of Festival 2018 and its ability to broaden and deepen connections with audiences and communities.

85% of Festival 2018 attendees rated their experience as excellent or good, with just 3% having a below average experience. More than half of respondents from all visitor categories were likely to attend more arts in future following their Festival 2018 experience, with local residents in each event city most likely to increase their arts attendance as a result of their festival experience.

Festival 2018 had a very strong impact for communities in Cairns and Townsville, with more than 60% of respondents giving a rating of excellent and more than 90% likely or very likely to attend more future arts as a result.

Figure 30: Festival 2018 rating

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Excellent	35%	48%	62%	63%	44%
Good	43%	45%	36%	30%	41%
Average	17%	6%	2%	6%	12%
Poor	3%	0%	0%	1%	2%
Very Poor	1%	0%	0%	0%	1%

(Q: How would you rate your Festival 2018 arts and cultural experience overall?)

Figure 31: % Likely or very likely to attend more arts in future following Festival 2018 experience

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	76%	90%	95%	93%	86%
Elsewhere in Queensland	64%	87%	96%	84%	69%
Interstate	55%	78%	81%	56%	58%
Overseas	63%	90%	73%	79%	76%

(Q: Following your Festival 2018 experience, are you more likely to attend arts and cultural events in future?)

7.0

GC2018 Expenditure

82%

Visited primarily to attend GC2018 sport or Festival 2018 events

\$195

Average spend on accommodation per person in the Gold Coast

\$314

Average spend on categories other than accommodation by attendees in the Gold Coast

**\$137
Million**

Estimated direct visitor spend in the Gold Coast

**\$146
Million**

Estimated direct visitor spend across Gold Coast and event cities

**\$72
Million**

Ticket sales revenue

38%

Direct expenditure and ticket sales contribution by interstate visitors

In order to identify trends and patterns to apply to the visitor population as a whole, expenditure data collected through the survey process was examined in depth across event cities, visitor types and sub-groups. As a very large survey sample was captured from respondents attending GC2018 events in the Gold Coast, it was possible to split out expenditure by detailed category. This means that the Gold Coast analysis identifies and applies targeted expenditure assumptions to the following groups:

- Visitors to sport events only
- Visitors to Festival 2018 events only
- Visitors to both sport and festival events
- Volunteers
- Media

- Athletes/officials

As athletes and officials were not surveyed, expenditure assumptions have been applied for this group based on volunteer spend patterns and secondary data regarding average length of stay and paid and unpaid services provided.

As the sample of respondents attending sporting events in Brisbane, Cairns and Townsville was much smaller than in the Gold Coast, the statistical significance does not enable expenditure trends to be reliable for the more detailed visitor sub-groups. In calculating and applying expenditure trends to the Brisbane, Cairns and Townsville visitor populations, the following groups have been used:

- Visitors to sport or festival events
- Volunteers

The figures detailed in this section of the report contain average and aggregated results for all sub-groups (including the different spectator types, volunteers, media and athletes) by event city and for GC2018 as a whole. The detailed underlying analysis can be accessed by event partners as required.

7.1 Additionality

A key step in examining overall economic impact is to assess that the proportion of expenditure is truly additional to the economy and wouldn't have otherwise occurred. The proportion of expenditure that would have occurred anyway (the 'deadweight') is accounted for through an additional adjustment that takes into consideration the reasons why respondents are spending money in the local area and what they would have done had they not attended the event. The surveys asked visitors whether attending the Games was the primary reason for their trip, and locals whether they came into the local area primarily to attend Games events. This enables spending during the visit to be associated with GC2018.

Figure 32: Percentage who visited primarily for GC2018 sport or Festival events

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	74%	71%	70%	82%	74%
Elsewhere in Queensland	95%	55%	45%	52%	92%
Interstate	96%	42%	14%	44%	92%
Overseas	72%	17%	6%	19%	53%

(Q: Was the Games the primary reason for your trip (or if not, did you modify your trip in order to attend)?)

(Q: Was attending a Games or Festival event the primary reason you came into the local area today?)

7.2 Average expenditure

Visitor experience and expenditure survey respondents were asked how much they spent on a range of detailed expenditure categories, including accommodation, food and beverages, tours and entertainment, transport, shopping and Games merchandise. Survey responses have been used to calculate the average spend for each category by visitor place of residence. To prevent outliers from skewing the data, all responses more than three standard deviations from the mean have been removed.

Figure 33: Average spend on accommodation per person

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	n/a	n/a	n/a	n/a	n/a
Elsewhere in Queensland	62	29	128	94	78
Interstate	311	115	248	83	189
Overseas	683	374	188	33	320
Average	195	117	161	85	140

(Q: Per person, how much did you spend on accommodation?)

Note: Spend on accommodation has been averaged across all relevant event visitors, including those that did not spend on accommodation. This may make certain values appear low.

Figure 34: Average spend on everything except accommodation per person

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	80	45	49	42	65
Elsewhere in Queensland	195	298	359	280	200
Interstate	514	299	710	376	509
Overseas	1,380	1,084	474	23	1,342
Average	314	138	75	56	274

Note: Average spend on everything except accommodation includes the amalgamation of a range of other spend categories (food, transport, shopping, tours, merchandise).

Merchandise includes only spend by visitors to the Games during their trip to the Games. It does not represent total merchandise sold across the Games.

The sample of overseas visitor respondents is too small to be significant for Townsville.

7.3 Direct expenditure

Direct expenditure estimates have been calculated by multiplying the number of visitors in each category who visited primarily for the Games by the spend profiles for their visitor category (accounting for the relevant spend categories for each group and the average amount spent).

Figure 35 includes estimated expenditure by spectators, volunteers, athletes and media. Estimated expenditure for non-surveyed visitors are contained in Sections 7.7 and 7.8.

Figure 35: Estimated direct visitor spending at GC2018

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	\$6,011,915	\$1,267,240	\$805,935	\$590,362	\$8,675,452
Elsewhere in Queensland	\$33,212,189	\$1,448,793	\$386,685	\$260,427	\$35,308,094
Interstate	\$61,818,597	\$850,252	\$262,656	\$69,156	\$63,000,661
Overseas	\$36,256,657	\$2,445,060	\$69,115	\$5,847	\$38,776,678
Total	\$137,298,007	\$6,011,345	\$1,524,391	\$925,792	\$145,759,535

Figure 36: Estimated percentage contribution by visitor type and event city

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	4%	21%	53%	64%	6%
Elsewhere in Queensland	24%	24%	25%	28%	24%
Interstate	45%	14%	17%	7%	43%
Overseas	26%	41%	5%	1%	27%
Total	100%	100%	100%	100%	100%

The majority of direct visitor expenditure occurred in the Gold Coast, with interstate visitors accounting for the largest proportion of Games-associated spending. Although overseas visitors spent more per person on average, the total interstate visitor numbers were much larger. As Cairns and Townsville had smaller proportions of visitors travelling from outside the local area, local residents generated the largest amount of Games-associated expenditure in these event cities.

7.4 Ticket sales

Total ticket sales data was provided by GOLDOC, and estimates of the split of sales by visitor place of residence have been calculated using survey data.

Figure 37: Estimated sporting ticket sales by visitor type and event city (\$)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	\$13,584,905	\$2,167,930	\$359,132	\$345,122	\$16,457,089
Elsewhere in Queensland	\$27,787,306	\$150,551	\$24,940	\$34,026	\$27,996,822
Interstate	\$20,377,357	\$270,991	\$44,892	\$14,583	\$20,707,823
Overseas	\$6,861,063	\$120,441	\$19,952	\$0	\$7,001,455
Total	\$68,610,631	\$2,709,912	\$448,915	\$393,731	\$72,163,189

Figure 38: Estimated sporting ticket sales by visitor type and event city (% split)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	20%	80%	80%	88%	23%
Elsewhere in Queensland	41%	6%	6%	9%	39%
Interstate	30%	10%	10%	4%	29%
Overseas	10%	4%	4%	0%	10%
Total	100%	100%	100%	100%	100%

7.5 Economic contribution

The economic contribution is defined as the direct visitor expenditure plus ticket sales. Figures 39-42 show the economic contribution of each visitor type within each event city and for GC2018 as a whole.

Figure 39: Direct visitor expenditure plus ticket sales (\$)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	\$19,596,820	\$3,435,170	\$1,165,067	\$935,485	\$25,132,541
Elsewhere in Queensland	\$60,999,495	\$1,599,343	\$411,625	\$294,453	\$63,304,916
Interstate	\$82,195,955	\$1,121,243	\$307,547	\$83,738	\$83,708,484
Overseas	\$43,117,720	\$2,565,500	\$89,067	\$5,847	\$45,778,134
Total	\$205,908,638	\$8,721,257	\$1,973,306	\$1,319,523	\$217,922,724

Figure 40: Direct visitor expenditure plus ticket sales (%)

EVENT CITY	GOLD COAST	BRISBANE	CAIRNS	TOWNSVILLE	TOTAL
Local	10%	39%	59%	71%	12%
Elsewhere in Queensland	30%	18%	21%	22%	29%
Interstate	40%	13%	16%	6%	38%
Overseas	21%	29%	5%	0%	21%
Total	100%	100%	100%	100%	100%

Figure 41: Expenditure and ticket sales contribution (\$)

LOCATION OF RESIDENCE	DIRECT SPEND	TICKET SALES	TOTAL
Local	\$8,675,452	\$16,457,089	\$25,132,541
Elsewhere in Queensland	\$35,308,094	\$27,996,822	\$63,304,916
Interstate	\$63,000,661	\$20,707,823	\$83,708,484
Overseas	\$38,776,678	\$7,001,455	\$45,778,134
Total	\$145,759,535	\$72,163,189	\$217,922,724

Figure 42: Expenditure and ticket sales contribution (%)

LOCATION OF RESIDENCE	DIRECT SPEND	TICKET SALES	TOTAL
Local	6%	23%	12%
Elsewhere in Queensland	24%	39%	29%
Interstate	43%	29%	38%
Overseas	27%	10%	21%
Total	100%	100%	100%

Direct visitor expenditure and ticket sales in the Gold Coast represented 94% of the total GC2018 contribution. Interstate visitors contributed the largest proportion of direct expenditure (43%), however visitors from other parts of Queensland contributed the most in ticket sales (39%).

7.6 Gold Coast Contribution

Figures 43-45 examine the economic contribution in the Gold Coast in more detail. Figure 43 identifies the direct expenditure in the Gold Coast associated with attendance at GC2018 sporting events, Festival 2018 events and a mix of sport and Festival 2018 events. It also contains estimated expenditure by media, volunteers and athletes. Figure 44 breaks down expenditure by the more detailed spend categories, to see which sectors or industries felt the greatest impact from Games visitation.

Figure 43: Gold Coast direct expenditure by attendee type

VISITOR TYPE	DIRECT EXPENDITURE (\$)	DIRECT EXPENDITURE (%)
Sport only event attendees	\$55,516,380	40%
Festival 2018 only attendees	\$4,436,517	3%
Sport & Festival attendees	\$58,775,801	43%
Media (accredited and non-accredited)	\$5,986,303	4%
Volunteers	\$6,145,138	4%
Athletes	\$6,437,868	5%
Total	\$137,298,007	100%

Figure 44: Gold Coast direct expenditure by spend category

EXPENDITURE CATEGORY	GOLD COAST	OVERALL GC2018
Spend on accommodation	\$44,915,703	\$46,194,640
Spend on food and beverages	\$39,818,573	\$42,861,975
Spend on transport	\$14,205,358	\$15,381,355
Spend on tours and entertainment	\$8,680,414	\$9,328,657
Spend on shopping	\$18,051,543	\$19,436,567
Spend on merchandise	\$11,626,416	\$12,556,339
Total	\$137,298,007	\$145,759,535

Figure 45: Gold Coast direct expenditure by spend category (%)

EXPENDITURE CATEGORY	GOLD COAST	OVERALL GC2018
Spend on accommodation	33%	30%
Spend on food and beverages	29%	30%
Spend on transport	10%	11%
Spend on tours and entertainment	6%	6%
Spend on shopping	13%	14%
Spend on merchandise	8%	9%
Total	100%	100%

The largest proportion of direct expenditure was generated by visitors who attended both sport and Festival 2018 events, with this visitor category spending more on average than people who only attended sports. This indicates that Festival 2018 played a role in driving increased visitor expenditure in key Gold Coast locations (Surfers Paradise and Broadbeach) during the Games. An additional \$4.4 million in direct expenditure was contributed by people attending Festival 2018 events only.

Accommodation accounted for the largest proportion of direct expenditure in the Gold Coast associated with GC2018 (33%). This was followed by food and beverages (29%) and shopping (13%).

7.7 Contribution from Non-Ticketed Sports Visitors

172,500 total attendances were recorded for non-ticketed sporting events, including Triathlon, Race Walk, Cycling, Mountain Bike and Marathon. As the survey data collected did not contain significant samples of respondents attending only non-ticketed sport; certain assumptions were required when estimating the behaviour and impact of this group.

It was necessary to determine both the number of visitors to non-ticketed sport *only* (those who did not also attend ticketed sport), and the number of individual attendances to non-ticketed sport. Expenditure estimates for visitors attending ticketed sport have already been calculated in the prior analysis, and it is also important not to double-count spending by those who attended multiple non-ticketed sports.

The Visitor and Expenditure survey showed that 28% of total sporting event visitors attended both ticketed and non-ticketed sports events. Based on a total sporting visitor estimate of 304,800 in the Gold Coast, this equates to 85,000 visitors attending both ticketed and non-ticketed sports events.

The post-Games survey carried out by Transport and Main Roads (TMR) showed that these individual 85,000 visitors attended a total of 92,500 sessions across the various non-ticketed sporting events. This equates to an average of 1.08 non-ticketed sporting events attended per visitor.

Dividing the total non-ticketed attendance figure of 172,500 by the average sessions per visitor of 1.08 gives a total non-ticketed visitor estimate of 159,000. Subtracting the 85,000 visitors who also attended ticketed sporting events leaves an estimate of 73,690 unique visitors to non-ticketed sport *only*.

It was conservatively assumed that all unique non-ticketed sports attendees lived locally, with the expectation that any visitors travelling to the Gold Coast for GC2018 would have been likely to also attend ticketed sport. Behaviour and spend patterns for non-ticketed sports visitors were estimated based on survey data from ticketed sports visitors. No spending on accommodation, shopping, tours or entertainment were included due to the assumption that these visitors lived locally.

Figure 46: Estimated direct expenditure from non-ticketed sports visitors by spend category

EXPENDITURE CATEGORY	DIRECT EXPENDITURE
Spend on accommodation	n/a
Spend on food & beverage	\$2,597,865
Spend on transport	\$547,087
Spend on entertainment	n/a
Spend on shopping	n/a
Spend on merchandise	\$1,500,483
Total	\$4,645,435

7.8 Contribution from Other Visitor Categories

Certain visitor groups were not included in the expenditure analysis above as they were not surveyed about their spend and behaviour patterns. These include the overall workforce associated with delivering the Games, technical officials, Games officials and Trade 2018 delegates. Surveying did not occur based on advice from GOLDOC around restrictions on sharing contact details and concerns about the appropriateness and likely success of survey approaches.

Although these groups were not surveyed, it is possible to estimate their total expenditure contribution based on known attendance numbers and the application of spend assumptions from other similar groups.

Workforce

The workforce for GC2018 included GOLDOC direct employees, contractors, suppliers and government agencies hired to ensure the smooth operation and delivery of the Games. The workforce included a total of 35,000 employees, of which 1,500 were GOLDOC direct employees. It is assumed that GOLDOC employees were local residents of the Gold Coast region, and the remaining 33,500 employees had a similar place of residence split to the volunteer population (with a large majority residing in the Gold Coast or elsewhere in Queensland). No accommodation expenditure has been included in the workforce expenditure estimates, as it is assumed most workforce accommodation was provided by Games contractors, and therefore part of the Games budget expenditure.

Technical Officials

There were 1,200 technical officials in a range of specialist roles. It is assumed that due to the specialist nature of the roles, the majority of technical officials would have been brought in from outside the local area. No accommodation or transport expenditure has been included in the technical official expenditure estimates, as this was provided by GOLDOC. Reduced spending on food and beverages has also been assumed, as a large proportion of meals were provided.

Games Officials

There were 2,150 Games officials from the CGF, Commonwealth Games Associations (CGAs) and International Federations (IFs) of sporting bodies. Although a small number may have been Australian, it is assumed that the majority are from overseas. No accommodation or transport expenditure has been included in the technical official expenditure estimates, as this was provided by GOLDOC. Reduced spending on food and beverages has also been assumed, as a large proportion of meals were provided.

Trade Delegates

There were 1,800 delegates to the Trade 2018 program. Although expenditure and behaviour surveys were not carried out for this group, a place of residence split was captured via separate feedback surveys. Just over two thirds of Trade delegates resided in the Gold Coast or Queensland, with the remaining third split between interstate and overseas delegates. It is assumed that Trade delegates had a similar behaviour and expenditure profile to media attendees, including some spending on accommodation, transport, food and entertainment.

Figure 47: Estimated other visitor numbers by place of residence

LOCATION OF RESIDENCE	WORKFORCE	TECHNICAL OFFICIALS	GAMES OFFICIALS	TRADE DELEGATES	TOTAL
Local	15,878			522	16,400
Elsewhere in Queensland	15,276	120		702	16,078
Interstate	3,253	480		234	3,987
Overseas	593	600	2,150	342	3,685
Total	35,000	1,200	2,150	1,800	40,150

Figure 48: Estimated direct expenditure from other visitors

LOCATION OF RESIDENCE	WORKFORCE	TECHNICAL OFFICIALS	GAMES OFFICIALS	TRADE DELEGATES	TOTAL
Local	\$596,376			\$100,512	\$696,888
Elsewhere in Queensland	\$5,170,788	\$29,053		\$337,825	\$5,537,666
Interstate	\$1,821,281	\$208,241		\$326,750	\$2,356,272
Overseas	\$528,745	\$247,874	\$888,216	\$416,735	\$2,081,570
Total	\$8,117,190	\$485,168	\$888,216	\$1,181,822	\$10,672,396

Figure 49: Estimated direct expenditure from other visitors by spend category

EXPENDITURE CATEGORY	WORKFORCE	TECHNICAL OFFICIALS	GAMES OFFICIALS	TRADE DELEGATES	TOTAL
Spend on accommodation	\$0	\$0	\$0	\$458,915	\$458,915
Spend on food & beverage	\$3,017,319	\$238,483	\$376,702	\$433,853	\$4,066,357
Spend on transport	\$2,355,010	\$0	\$0	\$50,710	\$2,405,720
Spend on entertainment	\$0	\$0	\$0	\$57,738	\$57,738
Spend on shopping	\$1,798,198	\$190,180	\$389,423	\$126,585	\$2,504,386
Spend on merchandise	\$946,663	\$56,505	\$122,091	\$54,023	\$1,179,282
Total	\$8,117,190	\$485,168	\$888,216	\$1,181,822	\$10,672,396

7.9 Total Expenditure Estimates – All Visitors

Combining expenditure estimates by in-scope and other visitor groups gives a total economic contribution estimate associated with GC2018.

Figure 50: Estimated visitor numbers from all groups

VISITOR TYPE	NUMBER OF VISITORS
Ticketed sport and Festival 2018 attendees (unique)	451,640
Volunteers	14,752
Accredited and non-accredited media	4,500
Athletes and team officials	6,600
Non-ticketed sports attendees	73,690
GC2018 Workforce	35,000
Technical Officials	1,200
Games Officials	2,150
Trade 2018 Delegates	1,800
Total	591,332

Figure 51: Estimated direct expenditure from each visitor group

VISITOR TYPE	DIRECT EXPENDITURE
Ticketed sport and Festival 2018 attendees	\$126,842,691
Volunteers	\$6,492,673
Accredited and unaccredited media	\$5,986,303
Athletes and team officials	\$6,437,868
Non-ticketed sports attendees	\$4,645,435
GC2018 Workforce	\$8,117,190
Technical Officials	\$485,168
Games Officials	\$888,216
Trade 2018 Delegates	\$1,181,822
Total	\$161,077,366

Figure 52: Estimated direct expenditure from all visitors by spend category

EXPENDITURE CATEGORY	DIRECT EXPENDITURE
Spend on accommodation	\$46,653,555
Spend on food & beverage	\$49,526,197
Spend on transport	\$18,334,162
Spend on entertainment	\$9,386,395
Spend on shopping	\$21,940,953
Spend on merchandise	\$15,236,104
Total	\$161,077,366

When expenditure by other visitor types is included in the analysis, the proportion of spending on food and beverages exceeds spending on accommodation. This reflects the greater number of local residents within other categories such as non-ticketed sports attendees and workforce.

7.10 Expenditure in other parts of Queensland

As part of the Visitor Experience and Expenditure survey, respondents residing outside the local area were asked whether they visited other parts of Queensland or other parts of Australia during their visit. Those who had visited other parts of Queensland and Australia were asked how many nights they stayed, and for details on the different Queensland regions that they visited.

These visitation figures have been used to calculate estimated expenditure in other parts of Queensland as a result of travel associated with GC2018. Survey respondents were not asked how much they spent on accommodation and other spend categories in other parts of Queensland, so average tourism spend for domestic and international visitors has been used.

The number of survey respondents in Brisbane, Cairns and Townsville who visited other locations was too small to be significant, so only results for visitors to GC2018 in the Gold Coast have been used.

Figure 53: Estimated number of GC2018 visitors who travelled to other parts of Queensland

LOCATION OF RESIDENCE	GOLD COAST VISITORS	VISITED OTHER PARTS OF QLD (%)	VISITED OTHER PARTS OF QLD (#)
Elsewhere in QLD	134,016	15%	20,295
Interstate	76,368	30%	22,998
Overseas	23,777	58%	13,885
Total	234,161	24%	57,179

Figure 54: Estimated visitor nights in other parts of Queensland

LOCATION OF RESIDENCE	AVERAGE NIGHTS - OTHER PARTS OF QLD	TOTAL ESTIMATED VISITOR NIGHTS
Elsewhere in QLD	8	165,745
Interstate	6	139,223
Overseas	8	111,935
Average/Total	8	416,903

Figure 55: Estimated visitor expenditure in other parts of Queensland

LOCATION OF RESIDENCE	AVERAGE TOURISM SPEND PER NIGHT	TOTAL ESTIMATED VISITOR SPEND
Elsewhere in QLD	\$183	\$30,331,417
Interstate	\$183	\$25,477,746
Overseas	\$100	\$11,215,897
Total		\$67,025,060

The largest proportion of expenditure in other parts of Queensland was generated by Queensland residents. Although the percentage of this visitor category who travelled to other parts of Queensland was the smallest (15%), the total size of the visitor group, average nights stayed and tourism spend estimates per night contributed to a greater total estimated spend.

The final figure below combines expenditure from all visitor groups, including 'in-scope' visitors, other visitors, non-ticketed sports visitors and visitors to other parts of Queensland. This generates a total expenditure estimate of \$300 million associated with GC2018.

Figure 56: Estimated total expenditure from all visitor groups

EXPENDITURE	DIRECT EXPENDITURE
Direct Expenditure	\$228,102,426
Ticket Sales	\$72,163,189
Total Expenditure	\$300,265,615

8.0

GC2018 Volunteers

Volunteers were a significant group associated with the Games delivery, in terms of size and contribution. This section details the demographics, behaviour, experience and feedback of volunteers, as separate from public visitor information detailed in the previous part of the report. Volunteer expenditure is included as part of the overall GC2018 expenditure calculations in Section 7 and has not been replicated here.

8.1 Volunteer Demographics

Figure 57: Location of residence of volunteers (% split)

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Gold Coast	43%	17%	40%
Brisbane	34%	71%	39%
Elsewhere in Queensland	11%	9%	11%
Interstate	10%	3%	9%
Overseas	2%	0%	2%
Total	100%	100%	100%

(Q: Which of the following best describes where you usually live?)

Figure 58: Location of residence of volunteers (numbers)

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Gold Coast	5,575	304	5,880
Brisbane	4,451	1,255	5,706
Elsewhere in Queensland	1,472	152	1,624
Interstate	1,261	44	1,306
Overseas	230	6	236
Total	12,990	1,762	14,752

Figure 59: Gender of volunteers (% split)

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Male	32%	38%	33%
Female	68%	61%	67%
In another Way	0%	0%	0%

(Q: How would you describe your gender?)

Figure 60: Age of volunteers (% split)

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Under 20	6%	4%	6%
20-29	6%	5%	6%
30-39	8%	6%	8%
40-49	15%	18%	15%
50-59	26%	27%	26%
60-69	29%	31%	29%
70+	10%	10%	10%

(Q: How old are you?)

Figure 61: Identity of volunteers (% split)

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Sports fan	71%	66%	70%
Non-English speaking background	4%	3%	4%
Aboriginal and/or Torres Strait Islander	2%	0%	1%
Person with a disability	3%	5%	4%
Caring for someone with a disability	6%	5%	6%
LGBTIQ person	3%	3%	3%
None of the above	23%	29%	24%

(Q: Do you identify as any of the following?)

8.2 Volunteer Behaviour

Figure 62: Percentage of volunteers that stayed overnight

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Local	6%	13%	7%
Elsewhere in Queensland	86%	60%	83%
Interstate	80%	93%	81%
Overseas	91%	100%	91%
Average	33%	21%	31%

(Q: Did you stay nights away from home as part of your work as a volunteer?)

Figure 63: Average nights stayed by volunteers

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Local	6	5	5
Elsewhere in Queensland	11	11	11
Interstate	12	14	13
Overseas	17	4	10
Average	10	8	9

(Q: How many nights did you stay away from home as part of your volunteering duties?)

Figure 64: Accommodation used by volunteers

EVENT CITY	GOLD COAST	BRISBANE	BOTH
Hotel/motel	15%	20%	15%
Bed and breakfast	5%	2%	5%
Holiday house or unit	14%	10%	14%
Caravan or camping	5%	3%	5%
Backpacker or hostel	2%	1%	2%
House of a friend or relative	58%	61%	58%
Other	10%	13%	11%

(Q: What type of accommodation did you use during your stay?)

Figure 65: Average number of days volunteered

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Local	10	8	9
Elsewhere in Queensland	8	8	8
Interstate	8	10	9
Overseas	9	n/a	9
Average	9	8	9

(Q: For how many days did you carry out volunteer duties?)

Figure 66: Duties performed by volunteers

DUTIES	GOLD COAST	BRISBANE	BOTH
Ticketed sporting events	59%	55%	58%
Non-ticketed sporting events	8%	6%	8%
Festival 2018 arts/cultural events	3%	1%	3%
Trade 2018 program	0%	0%	0%
Transport	26%	42%	28%
Other	20%	9%	19%

(Q: For which of the following did you carry out volunteer duties during GC2018?)

Figure 67: Sports volunteered at

SPORTS	GOLD COAST	BRISBANE	BOTH
Athletics	28%	4%	25%
Badminton	14%	1%	12%
Basketball	5%	0%	5%
Bowls	5%	0%	5%
Boxing	10%	2%	9%
Cycling	7%	46%	12%
Diving	6%	1%	6%
Gymnastics	7%	3%	7%
Hockey	8%	2%	7%
Netball	10%	1%	9%
Rugby Sevens	11%	7%	11%
Shooting	1%	62%	8%
Squash	11%	2%	10%
Swimming	11%	0%	9%
Table Tennis	11%	2%	10%
Triathlon	5%	1%	4%
Volleyball	7%	1%	7%
Weightlifting	11%	2%	10%
Wrestling	10%	0%	9%

(Q: Which sports did you volunteer at?)

8.3 Volunteer Experience

Volunteers were asked to provide ratings of their experience volunteering, their experience of the sporting events, and their perceptions or thoughts on the experience of spectators based on their interactions with them. They were asked to identify key factors that they thought influenced the positive or negative experience of spectators, and provide their own or spectator feedback in an open text box.

Figure 68: Rating of own experience as a volunteer

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Excellent	57%	54%	57%
Good	30%	31%	30%
Average	8%	10%	9%
Poor	3%	3%	3%
Very Poor	1%	2%	1%

(Q: How would you rate your overall experience of volunteering at GC2018?)

Figure 69: Rating of own experience at sporting events by volunteers

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Excellent	68%	62%	67%
Good	25%	29%	26%
Average	5%	6%	5%
Poor	1%	3%	1%
Very Poor	1%	1%	1%

(Q: How would you rate your overall experience of the sporting events?)

Figure 70: Rating of spectator experience at sporting events by volunteers

EVENT CITY	GOLD COAST	BRISBANE	TOTAL
Excellent	65%	61%	64%
Good	33%	34%	33%
Average	2%	3%	2%
Poor	0%	1%	0%
Very Poor	0%	0%	0%

(Q: How would you rate the overall experience of spectators at the sporting events?)

Figure 71: Comparing ratings

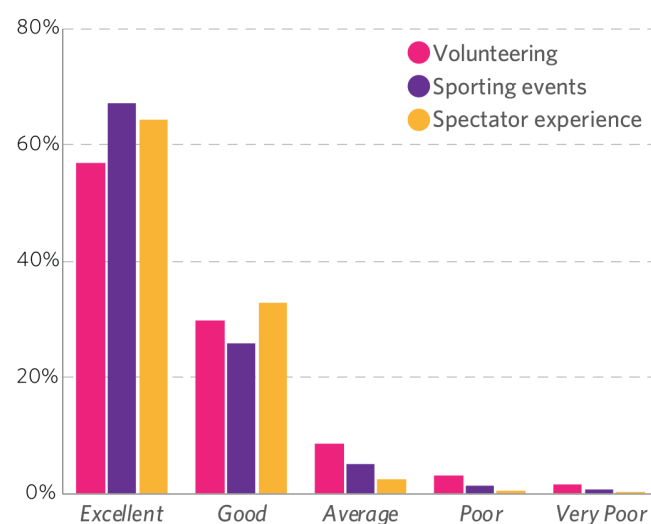


Figure 72: Factors influencing experience of spectators

EVENT CITY	POSITIVE	NEGATIVE
Ticketing and entry arrangements	43%	21%
Seating/ viewing position and comfort	42%	22%
Sporting performance	74%	11%
Food and beverage options	21%	27%
Venue amenities (e.g. toilets, rubbish bins, drinking fountains)	45%	17%
Safety and security arrangements	53%	13%
Transport	56%	33%
Crowd entertainment and enthusiasm	67%	11%
Provision of information and assistance	55%	13%
Respect shown for Aboriginal and Torres Strait Islander culture	27%	10%
Other	7%	12%

(Q: What do you think were the main factors contributing to a positive or negative overall Games experience?)

On average, volunteers identified five positive factors and two negative factors from the list of options. Volunteers were also asked if they had any feedback from spectators or themselves that they wanted to share. A selection of feedback is outlined below:

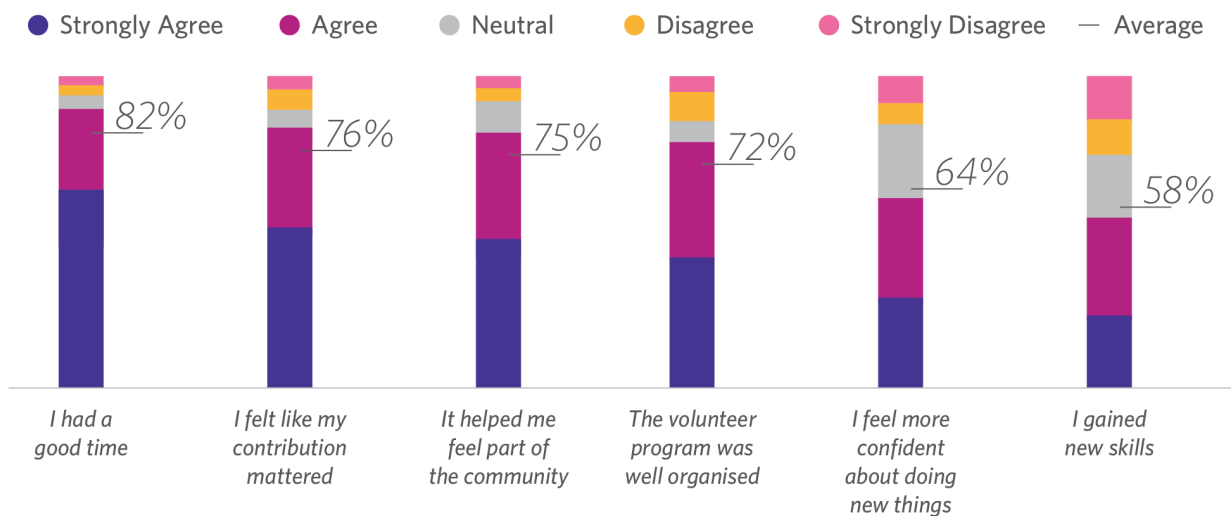
- Sporting team members and officials indicated to me that the light rail was fantastic for them to get around. Didn't need the cars provided as much. Everyone was very friendly.

- Although I was able to contribute to the 8 to 9 hour shifts, my recommendation would be to have 5 hour shifts. Some volunteers struggled with the shift lengths and believe those who pulled out of volunteering may have been able to do smaller shifts.
- Spectators who'd paid for the most expensive athletics seats weren't impressed that they were on the opposite side of the stadium from the home straight.
- Lots of complaints about the amount of time it took to get a shuttle bus either back to Nerang station or on to Broadbeach from the athletics stadium.
- Most people I spoke to said they were the friendliest games they had been to.
- Food and drink options were a little expensive. Lack of info from transport 'people' about services/times available.
- Too much focus on getting you in and out and not encouraging people to stay and wait and enjoy the rest of the city. Pushing for public transport only made it a lot of travel to some short sessions.
- The overall cleanliness of the venue and surrounding areas was very good. Hats off to the cleaning staff.

8.4 Volunteer Outcomes

Volunteers were asked to think about five outcomes related to their experience volunteering during GC2018 and identify whether or not they agreed with the statements. Figure 73 charts the average score and proportion of volunteers who agree and disagree, and Figure 74 contains the percentage of volunteers who agreed or strongly agreed with the outcomes.

Figure 73: Volunteer outcomes



(Q: Thinking about your experience as a volunteer for GC2018, do you agree with the following statements?)

Figure 74: Percentage of volunteers who agreed with outcomes

DIMENSION	STATEMENT	PERCENT WHO AGREED
Enjoyment	<i>I had a good time</i>	90%
Contribution	<i>I felt like my contribution mattered</i>	83%
Belonging	<i>It helped me feel part of the community</i>	82%
Organisation	<i>The volunteer program was well organised</i>	79%
Confidence	<i>I feel more confident about doing new things</i>	61%
Skills	<i>I gained new skills</i>	55%

9.0

Gold Coast Legacy

The contribution of large events reaches beyond immediate economic impacts. In addition to visitation and spending, events can enhance the character and vibrancy of an area, increasing its attractiveness as a place to live, work and visit. A range of longer term outcomes can be achieved, including sustainable business growth, community engagement and participation, social cohesion and promotion of the region to visitors.

The 2018 Gold Coast Commonwealth Games was a hugely important event for Queensland. As a result of significant investment in sporting, transport, cultural and visitor infrastructure and development in the lead up to the Commonwealth Games, a range of key legacy outcomes were considered:

- Creating enduring jobs and powering economic growth
- Accelerating the Gold Coast to a world-class boutique city
- Building active, engaged and inclusive communities

9.1 Local community

Local residents were asked several survey questions regarding the impact of GC2018 for the Gold Coast region and residents. Figure 75 shows the percentage of respondents who agreed with the four legacy outcomes.

Figure 75: Percentage agreement with Gold Coast legacy outcomes

DIMENSION	STATEMENT	AGREE (%)
World-class City	The Gold Coast is growing into a world-class city with distinct strengths	75%
Active Lifestyles	More people are participating in sports and living active lifestyles	51%
Respect for Culture	The community is more aware and respectful of Aboriginal and Torres Strait Islander culture	49%
Business Boost	Local business and employment have been boosted and will last beyond the Games	31%

(Q: Thinking about the impact of the Commonwealth Games for the Gold Coast region and residents, do you agree with the following statements?)

9.2 Future visitor growth

In addition to direct legacy impacts for local businesses and residents, GC2018 will drive longer term visitor growth to the Gold Coast and surrounding region. Intrastate, interstate and overseas visitors were asked whether they would be likely to return or recommend other visit the Gold Coast as a result of their Games visit. Figure 76 shows that high levels of positivity towards the Gold Coast as a place to visit could generate approximately 440,000 future visits during the next ten years.

Figure 76: Future visitor growth

Rated the Gold Coast as an excellent or good place to visit	92%
Likely to return to the Gold Coast	87%
Likely to recommend the Gold Coast to friends or family	85%
Possible future visitors	439,500

9.3 Volunteer legacy outcomes

A large number of local Gold Coast residents volunteered for GC2018, and were surveyed to find out whether their experience volunteering generated positive outcomes for them as individuals.

Figure 77 shows the percentage of volunteers who agreed with three legacy outcomes.

Figure 77: Volunteer legacy outcomes

OUTCOME STATEMENT	% AGREE
It helped me feel part of the community	82%
I feel more confident about doing new things	61%
I gained new skills	55%

9.4 Cultural legacy outcomes

The significant investment in Festival 2018 by the Queensland Government, City of Gold Coast and three event cities generated legacy outcomes for the cultural sector and artists with respect to profile and skills development, growing local audiences and increasing engagement with local culture.

Figure 78 shows Festival 2018 outcomes for local residents in the Gold Coast. Figure 79 shows outcomes for artists or cultural organisations collected via Festival 2018 surveying.

Figure 78: Festival 2018 legacy outcomes - Audiences

Rated Festival 2018 as excellent or good	78%
Likely to attend more arts in future following Festival 2018 experience	76%

Figure 79: Festival 2018 legacy outcomes - Organisations/Artists

OUTCOME STATEMENT	% AGREE
Festival 2018 raised the profile of artists	87%
Festival 2018 opened up new opportunities for artists	89%
Festival 2018 helped artists to learn or develop new skills	77%
Festival 2018 enabled artists to collaborate with others	80%

10.0

Summary of Insights

Visitor Estimates

An estimated total of 591,332 visitors attended or participated in GC2018 across nine visitor categories. Of these, 64% were locals or day-trippers, 28% were domestic overnight visitors, and 8% were overseas visitors.

Visitor Demographics

The majority of GC2018 survey respondents in each event city lived locally, except for the Gold Coast in which a larger percentage travelled from other parts of Queensland to attend sports and festival events. Local attendance was particularly strong in Townsville (87%) and Cairns (79%), driven by Festival 2018 events.

Females represented the greatest percentage of survey respondents across all event cities, with an average of 65% female public visitors to GC2018 sports or Festival 2018 events as a whole.

A mix of age cohorts was in attendance across GC2018, with the largest percentage of respondents aged 40-49 (25%) and 50-59 (21%). Brisbane attracted a larger percentage of younger age cohorts as a result of Festival 2018 programming.

Respondents of diverse backgrounds and identities were present across the event cities, including Aboriginal and/or Torres Strait Islanders, people with disability or caring for someone with disability, and visitors from non-English speaking backgrounds.

Visitor behaviour

Just 37% of overseas visitors had visited the Gold Coast previously, meaning 63% were new to the city. 95% of interstate visitors had been to the Gold Coast before, along with 100% of visitors who lived in other parts of Queensland. This indicates that GC2018 was a successful driver of both new and repeat visitation.

On average, respondents attended four sporting event sessions during their GC2018 visit, with overseas visitors attending an average of six sessions and locals attending an average of three.

Group size did not vary much across the event cities and visitor types, with respondents citing an average of three people (plus themselves) in their travel parties. Locals were more likely to attend in slightly larger groups than interstate and overseas visitors.

Across all event cities, an average of 76% of visitors indicated that they stayed overnight. The highest percentages of overnight visitors came from overseas and interstate, with some visitors from other parts of Queensland making day trips only. This was most prominent in the Gold Coast, with visitors from other parts of South East Queensland travelling to GC2018 events but not staying overnight.

On average, visitors spent seven nights away from home as part of their GC2018 visit. Overseas visitors to the Gold Coast and Brisbane stayed longer due to the greater distance travelled and larger number of events attended.

The most common form of accommodation used was hotel/motel, however many Gold Coast visitors also stayed at the house of a friend or relative, or a holiday house or unit. Half of all Brisbane visitors stayed in a hotel or motel.

More than half of all overseas visitors who came to the Gold Coast for GC2018 also visited other parts of Queensland and Australia. Just under one third of interstate visitors travelled to other parts of Queensland during their visit.

Brisbane was the most visited destination amongst visitors, with many likely to have flown in and out of Brisbane airport. 11% also visited the Sunshine Coast, while 5% or fewer visited regions further afield. Those who travelled to other locations in Queensland visited an average of two cities or regions in addition to the Gold Coast.

On average, visitors spent eight nights in other parts of Queensland, and 14 nights in other parts of Australia.

Visitor experience

93% of respondents rated their sporting experience as excellent or good, with just 2% having a poor experience. On average, respondents rating their experience as excellent or good selected six positive factors from the list of options. Two reasons were given on average for negative experiences, with the positive clearly outweighing the negative across all factors.

92% of visitors rated the event or host city as an excellent or good place to visit. Only 1% of respondents found the city to be a poor place to visit.

87% of visitors said they were likely or very likely to return to the city again, and 85% were likely or very likely to recommend the event city to friends and family.

It is estimated that over 220,000 visitors are likely to return to the event city, and approximately 218,000 new visitors may travel to the event city on the recommendation of a friend or family. This equates to a potential 440,000 future visitors.

85% of Festival 2018 attendees rated their experience as excellent or good, with just 3% having a below average experience. More than half of respondents from all visitor categories were likely to attend more arts in future following their Festival 2018 experience,

with local residents in each event city most likely to increase their arts attendance as a result of their festival experience.

Festival 2018 had a very strong impact for communities in Cairns and Townsville, with more than 60% of respondents giving a rating of excellent and more than 90% likely or very likely to attend more future arts as a result.

Visitor expenditure

The majority of direct visitor expenditure occurred in the Gold Coast, with interstate visitors accounting for the largest proportion of Games-associated spending. Although overseas visitors spent more per person on average, the total interstate visitor numbers were much larger. As Cairns and Townsville had smaller proportions of visitors travelling from outside the local area, local residents generated the largest amount of Games-associated expenditure in these event cities.

Direct visitor expenditure and ticket sales in the Gold Coast represented 94% of the total GC2018 contribution. Interstate visitors contributed the largest proportion of direct expenditure (43%), however visitors from other parts of Queensland contributed the most in ticket sales (39%).

The largest proportion of direct expenditure was generated by visitors who attended both sport and Festival 2018 events, with this visitor category spending more on average than people who only attended sports. This indicates that Festival 2018 played a role in driving increased visitor expenditure in key Gold Coast locations (Surfers Paradise and Broadbeach) during the Games. An additional \$4.4 million in direct expenditure was contributed by people attending Festival 2018 events only.

Accommodation accounted for the largest proportion of direct expenditure in the Gold Coast associated with GC2018 (33%). This was followed by food and beverages (29%) and shopping (13%).

A total of \$300 million in direct expenditure and ticket sales is estimated to have been contributed to the Queensland economy by all visitor, attendee and participant groups associated with GC2018.

11.0

Appendix A: Survey Questions

- 1 Which of the following best describes where you usually live?
 - Gold Coast
 - Elsewhere in Queensland
 - Interstate
 - Overseas
- 2 What is your postcode?
- 3 Which country do you live in?
- 4 How old are you?
- 5 How would you describe your gender?
 - Female
 - Male
 - In another way
- 6 Do you identify as any of the following?
 - Sports fan
 - Non-English speaking background
 - Aboriginal and/or Torres Strait Islander
 - Person with a disability
 - Caring for someone with a disability
 - LGBTIQ person
 - None of the above
- 7 Have you visited the Gold Coast before?
 - Yes/No
- 8 Which of the following did you attend/take part in?
 - Ticketed Sporting Events
 - Un-Ticketed Sporting Events
 - Festival 2018 Arts/Cultural Events
 - Trade 2018 Program
 - None of the above
- 9 How many sporting events did you attend?
- 10 Did you stay overnight in the Gold Coast as part of this visit?
- 11 How many nights did you stay in the Gold Coast or surrounds as part of this visit?
- 12 What type of accommodation did you use during your stay?
- 13 Per person, how much did you spend on accommodation?
- 14 Per person, how much did you spend on food and drinks?
- 15 Per person, how much did you spend on Games merchandise?
- 16 Per person, how much did you spend on tours, attractions and entertainment?
- 17 Per person, how much did you spend on shopping?
- 18 Per person, how much did you spend on transport?
- 19 How many people were in your travel party?
- 20 Was the Games the primary reason for your trip (or did you modify your trip to fit the Games)?
- 21 As part of this trip, did you visit any of the following locations?
 - Other Parts of Queensland
 - Other Parts of Australia
 - None of the above
- 22 How many nights did you spend in other parts of Queensland?
- 23 How many nights did you spend in other parts of Australia?
- 24 Did you visit any of these other locations in Queensland?

- 25 What sources of information did you use to plan your visit to Queensland?
- 26 How would you rate your overall experience attending the sporting events?
- Excellent
 - Good
 - Average
 - Poor
 - Very Poor
- 27 What were the main factors contributing to your experience?
- Ticketing and entry arrangements
 - Seating/ viewing position and comfort
 - Sporting performance
 - Food and beverage options
 - Venue amenities (e.g. toilets, rubbish bins, drinking fountains etc.)
 - Safety and security arrangements
 - Transport
 - Crowd entertainment and enthusiasm
 - Provision of information and assistance
 - Respect shown for Aboriginal and Torres Strait Islander culture
 - Other (please specify)
- 28 How would you rate the quality of the Gold Coast as a place to visit?
- 29 How likely are you to visit the Gold Coast again?
- 30 How likely are you to recommend or encourage others to visit the Gold Coast?
- 31 How would you rate your Festival 2018 arts and cultural experience overall?
- 32 Following your Festival 2018 experience, are you more likely to attend arts and cultural events in future?
- 33 Approximately how often do you attend or participate in arts and cultural events/activities?
- 34 Any other thoughts or comments about your experience at the Games?



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