A City That Says Yes.

Gold Coast's momentum, opportunity and ambition. A story of confidence, growth and a city ready to say yes to what comes next.

State of the City Report 2026

Invest Gold Coast.

Acknowledgement of Country

We acknowledge and pay our respects to the Traditional Owners, the Aboriginal people of these lands and waters and we acknowledge all their descendants. We also acknowledge the many Aboriginal people from other regions as well as Torres Strait and South Sea Islander people who now live in the local area and have made an important contribution to the community.

About Invest Gold Coast

Established by the City of Gold Coast (City) in February 2025, Invest Gold Coast leads investment attraction, industry growth and global engagement. Working alongside Brand Gold Coast and Experience Gold Coast, it connects investors, businesses and partners to the opportunities, support and relationships that help the right projects move forward. This report is Invest Gold Coast's first comprehensive assessment of the Gold Coast's economic position, capability and trajectory.

The Gold Coast is building an economy with real depth and global relevance, giving investors and businesses a stronger platform to scale. This is driven by sectors where the city is already generating value and has the strongest growth potential, including health and wellbeing, advanced manufacturing, the knowledge economy, education, tourism and screen production. Together, these sectors are strengthening the depth and diversity of the local economy.

Throughout this report, the City of Gold Coast (City) refers to the local government authority responsible for planning, infrastructure, services and long-term city development. After the first reference, City is used as the shortened form. When referring to the place itself, city is used in a geographic sense. This distinction ensures clarity between the organisation and the broader economy it supports.

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Yes to opportunity.

I have been Mayor of this city since 2012. Before that, I ran a business, raised a family and lived a Gold Coast life. Like many people here, I came from somewhere else, had a crack and built a future.

That is the Gold Coast story.

For decades, people have come here to build something better. A business. A career. A family. A future. Today, that same spirit is matched by an economy with real scale, momentum and diversity.

Since 2012, the Gold Coast has changed significantly. Our economy has grown from $36 billion in 2011/12 to over $55 billion. Our population has grown from 528,000 to more than 690,000 as at June 2025 and is heading toward 1 million by 2046. We have added around 110,000 jobs, grown to more than 83,000 businesses and strengthened our position as one of Australia's fastest growing economies.

This progress has not happened by accident. It reflects years of setting a clear direction, backing the right opportunities and building the foundations for a more diverse and resilient city economy. It has also positioned the Gold Coast to back the industries, skills and international relationships that will shape its next phase of growth.

There is a record number of cranes in the sky. I love looking at them, at what they say about Gold Coast confidence, ambition and growth.

But it is about so much more than construction.

Behind each tower is a team of people investing in the city's future: the financial experts, the developers and architects, the building trades, the artists and business people, the new parents who bought the apartments, the retail, café and restaurant owners, the tech entrepreneurs, doctors offices and filmmakers.

This report captures all of that creativity and dynamism; the openness of a city whose promise continues to attract people from across Australia and around the world who heard "no" too often where they came from.

That openness is one of the Gold Coast's greatest strengths. People come here from everywhere, but they do not stay outsiders for long. They become Gold Coasters. This report is also an invitation to all Gold Coasters to help build what comes next.

We have the mindset to make it happen.

Tom Tate
Mayor of the Gold Coast

Yes to momentum.

The Gold Coast is not standing still.

Investment is arriving. Industry depth is growing. Industries that once sat at the margins of the local economy are now taking shape with greater depth and visibility. That progress has not happened by accident. It reflects years of widening the city's economic base and backing the parts of the economy with the strongest long-term potential. The question now is how to convert that momentum into something that endures.

This report is part of that effort. It is an honest account of where the city stands in 2026, and a clear-eyed articulation of where it is headed.

The Gold Coast is sharpening around the industries, strengths and international relationships shaping its next phase of growth. The city's next advantage will come not from trying to do everything, but from being clearer about where it can build genuine long-term economic weight, and be more deliberate about the partnerships needed to get there.

At Invest Gold Coast, we help connect investment to place, local strength to demand and ambition to action. We sit at the intersection of industry and government, helping investors and business structure opportunities, reduce complexity and move projects forward. Our measure of success is the value we return to the city. We work alongside the City of Gold Coast, Brand Gold Coast and Experience Gold Coast, each bringing distinct strengths to a shared city agenda, so the city speaks with one voice.

Invest Gold Coast is already helping turn strategic intent into measurable outcomes, through both city-shaping projects and broader sector facilitation. Projects including the Gold Coast Arena, Miami Arts Depot, the Titans High Performance Centre and Shadowbox Studios are projected to generate significant long-term economic value, while supported activity across screen, defence, aerospace and advanced manufacturing is forecast to deliver billions in economic benefit and thousands of jobs.

The Brisbane 2032 Olympic and Paralympic Games will accelerate what is already in motion. But the opportunity is not contingent on the 2032 Games. The city has already begun the harder and more consequential work of aligning infrastructure, precincts, skills and investment into a platform that supports a stronger, more productive and more resilient economy.

That is what this report is intended to reflect.

It is a picture of a city that has become stronger, more diverse and more investable. And it is an invitation to look again at the Gold Coast, not simply as a place to visit, but as a place to build, invest, partner and grow.

The momentum is real. The time to act is now.

Mark Girard
CEO Invest Gold Coast

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What the Gold Coast already is.

The Gold Coast is no longer an investment city of tomorrow. It is investment ready today, with the scale, economic strength and confidence to support long-term investment and growth.

One of Australia's fastest growing economies

The Gold Coast has entered a new chapter. It is one of Australia's fastest growing economies, with more than $55 billion in gross regional product (GRP), reflecting the scale of value created across the local economy, alongside more than 350,000 jobs and over 280,000 full-time equivalent (FTE) jobs, capturing both the total number of roles and the amount of full-time work across the city.

It is a more complex and broad-based economy than many assume, reflected in an economic complexity score that ranks second nationally behind only Sydney. That complexity gives the city a stronger platform for investment, industry growth and long-term economic resilience than older perceptions suggest. While the score has softened from its recent peak, it remains a sign of the depth and diversity of the city's industry base, and of the need to keep strengthening it.

Not defined by growth alone

That growing scale is shifting the question from whether the Gold Coast is growing to how that growth is taking shape. Six priority sectors contribute $24 billion in gross value added (GVA), showing how much value these industries generate within the economy, and support around 145,000 full-time equivalent (FTE) jobs, growing by 17% and 45% respectively since 2020/21.

That shift is already visible in the city's growing network of industry, health, cultural and visitor infrastructure. The cultural offer is being strengthened by Home of the Arts (HOTA) and set to deepen further through the Gold Coast Music Hall, the proposed Gold Coast Arena and Miami Arts Depot. The visitor economy is also being strengthened through the Destination Management Plan and a growing nature-based tourism offer.

This is more than growth. It is a shift in how the economy works. Advances in artificial intelligence, digital infrastructure and advanced manufacturing are changing how industries operate, how businesses scale and how cities compete. The Gold Coast is already part of that shift.

Shaped around long-term priorities

More than $23 billion in major projects, each valued at over $20 million, across 90 developments and supported by record crane activity show real momentum and a city being reshaped in real time.

Capital must now flow into the cultural assets, precincts and projects that support a stronger city economy. The same logic applies internationally. Trade and global engagement are becoming more important to the city's future. The Gold Coast's priority sectors are aligning with global markets that can support their growth.

Turning growth into long-term value

GRP has grown from more than $36 billion to over $55 billion since 2012. The task now is to turn that scale into stronger long-term economic value. Housing affordability and rental costs remain one of the most significant pressures on the city's next phase of growth. GRP per FTE worker has reached $195,000 and is growing faster than Brisbane, but per capita output still sits below the capital city average.

Net internal migration, while still positive, has moderated, a pattern shared across most Australian cities but one that makes sustained investment in liveability, housing supply and jobs more important. Export activity remains below comparator cities, pointing to the need for more businesses that sell beyond the Gold Coast.

These are the next set of challenges a growing city must address with the same intent it has brought to the strengths already built.

Throughout this report, one theme is constant. Gold Coasters succeed when they work together.

Public leadership, private capital, industry, brand, tourism, education and partnerships are most powerful when they align around a shared city agenda.

The next phase will depend not only on scale, but on sharper choices about where the city builds long-term productivity, resilience and competitiveness. That means making clearer choices about which industries the Gold Coast backs and backing them properly. This is the logic of the new Gold Coast economy: growth that does more than add scale, strengthening industries, lifting productivity and delivering longer-term value.

The Brisbane 2032 Olympic and Paralympic Games will accelerate the city's profile and investment horizon, but the Gold Coast's future does not depend on it. This is the moment to strengthen the city on its own terms.

This report is a record of progress and an invitation to investors, businesses, institutions and partners who want to help shape what comes next for one of Australia's most open, creative and dynamic city economies.

UNDERSTANDING OUR ECONOMIC METRICS

Gross Regional Product (GRP)
Measures the total size of the Gold Coast economy and how fast it is growing.

Gross Value Added (GVA)
Shows how individual industries contribute to that total.

These measures are used throughout the report to assess the size of the economy and how its industries are evolving.

1.01 ECONOMIC COMPLEXITY SCORE AND #2 NATIONAL RANKING, HIGHLIGHTING THE DEPTH AND SOPHISTICATION OF THE ECONOMY

In 2024/25, the Gold Coast recorded an economic complexity score of 1.01, placing it second behind Sydney in the benchmark set. This points to a broader and more capable industry base than older perceptions suggest, with more pathways for future growth and competitiveness.

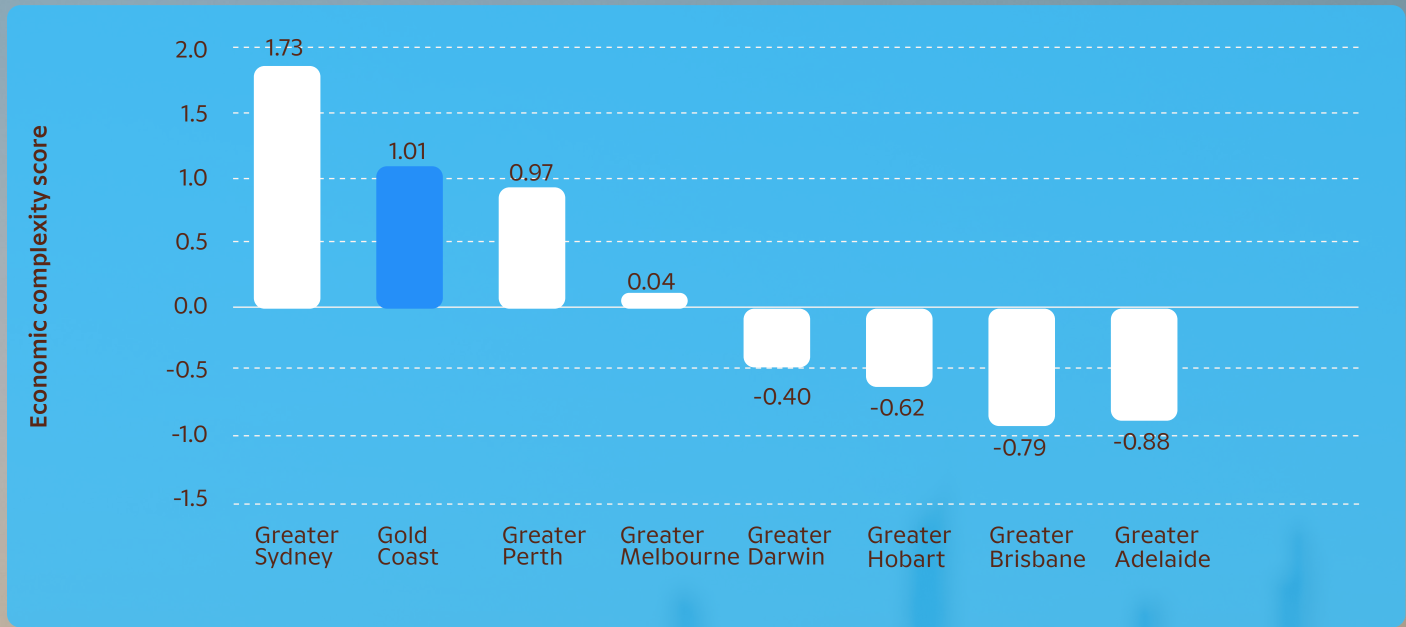

Figure 3.1 Economic complexity score, Gold Coast and benchmark cities, 2024/25

Yes to opportunity.

The Gold Coast's economic story is becoming clearer and more compelling as it moves from waiting for opportunity to turning it into outcomes. For investors, businesses and institutions prepared to move early, that creates a clear advantage.

A stronger, broader economic base

That depth is already visible in one of Australia's fastest-evolving city economies. Sectors once seen as peripheral to a visitor and construction economy, from screen to financial and professional services, are now nationally significant and increasingly globally recognised.

The Gold Coast has moved well beyond its origins as a series of seaside towns, becoming one of Australia's largest city economies. What has not changed is the spirit of a city where people back themselves and each other. From the pioneers who built industries in marine, medical research, screen and tourism before anyone expected it, to the entrepreneurs who saw opportunity where others saw risk, this city has a long history of turning big ideas into big business.

That same entrepreneurial drive is now connecting to higher-value industry. In 2025, Gilmour Space Technologies became the first Australian commercial company to attempt an orbital launch, with the rocket and its core systems designed and built on the Gold Coast.

The gap between perception and reality

Perception has real economic consequences. City Nation Place and Bloom Consulting research shows it accounts for 37% of foreign direct investment inflows, 23% of tourism receipts and 22% of net migration. The Gold Coast's economic story is still being told. For many, the city is still seen through the prism of beaches, tourism and theme parks. Those strengths are real, but they are no longer the whole story.

Gold Coasters wake up early, meet the sun, and work hard. It's time to present the city with greater clarity and confidence, as a place with more depth, more economic strength and more significance.

That gap between perception and reality creates opportunity, especially for investors, businesses and institutions prepared to move before the wider market catches up. Kearney's 2025 Global Cities Report reinforces this shift, showing that competitiveness increasingly depends less on legacy and more on readiness. Cities outside traditional power centres are gaining ground through targeted investment in connectivity, specialisation and infrastructure.

A city moving from visibility to credibility

Cultural capital is part of how cities move from recognition to credibility. On the Gold Coast, that shift is already visible in City investment in infrastructure such as HOTA and in globally oriented firms such as AutogenAI, which has established its APAC headquarters here, alongside BIVACOR and Gilmour Space Technologies helping build advanced capability from the Gold Coast.

HOTA, backed by $130 million in City investment, has changed how the Gold Coast is experienced and valued. It signals confidence, maturity and long-term intent.

The fast mover opportunity for investors

The opportunity is visible across a city where investment, infrastructure and industry are already taking shape at scale. This is not growth concentrated in one centre.

Culture also matters. It is a city where access often matters more than hierarchy, and where ideas can move quickly into action. That helps explain why new strengths take shape quickly.

BRANDS VALUE INDICATORS

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

$21B
Gold Coast brand value

37%
FDI inflows driven by perception

23%
Tourism receipts driven by perception

22%
Net migration driven by perception

WHAT THIS MEANS

The Gold Coast's economic story has outgrown the narrative many still hold. With more than $55 billion in GRP and a brand valued at $21 billion, it is one of Australia's most underestimated city economies. Those who move before wider perceptions catch up, will find a city with real economic depth, growing national significance and a clearer path to long-term advantage.

Yes to economic growth.

Economic growth on the Gold Coast is now at a pace that has redefined the investment landscape. The city has built scale and is now generating economic value, creating the economic weight, business base and investment conditions that support long-term commitment.

Economic scale taking shape

During the past 12 years, the Gold Coast has built real economic scale across output, jobs, business formation and investment. As a relatively young city still building its economic base, the Gold Coast has been able to grow new strengths alongside established ones rather than replacing old industries with new.

This growth reflects population increase, business formation, public and private investment and infrastructure delivery. Construction, healthcare, tourism, retail and professional services remain major contributors. At the same time, new sources of value are growing across advanced manufacturing, health and wellbeing, marine, screen and game production, education, technology, major events and knowledge economy.

A more complex and resilient economy

The Gold Coast ranks second nationally behind only Sydney for economic complexity, with a score of 1.01. Economic complexity measures how diverse and sophisticated an economy is, based on the range and mix of industries contributing to output. For the Gold Coast, that signals a stronger and more diverse industry base than older perceptions suggest, with more ways to grow, compete and build jobs, exports and high-value industries.

While the score has softened from its recent peak, it remains well above the capital city average, a signal that continued focus on the breadth of the economic base is critical.

A city with multiple growth pathways

The Yatala-Stapylton corridor is emerging as one of Australia's most significant concentrations of modular construction manufacturing. Initiatives supported by Invest Gold Coast include:

- ModnPods, backed by the Queensland Investment Corporation and partnered with McNab, produces up to 400 modular pods per year from its 6,300 square metre Arundel factory. The company is looking to expand into premises up to 4 times larger
- Modscape + Modbotics, confirmed a new 50,000 square metre advanced manufacturing facility at Yatala in 2026 with capacity to manufacture up to 2,500 modules per year and an in-house robotics line.

As housing demand grows and construction capacity tightens across Australia, modular manufacturing is becoming a complementary delivery model, and the Gold Coast is building the industry to support it.

The corridor's ambition extends beyond housing and manufacturing. The Advanced Resource Recovery Centre is a $1.6 billion integrated energy and recycling precinct that will divert up to 97% of the city's waste from landfill, generate enough energy from residual waste to power up to 80,000 homes, produce green hydrogen for the City's vehicle fleet and anchor an innovation park for circular economy businesses on over 70 hectares of City-owned land.

The first stage, a $90 million organics processing facility at Yatala, is already operational. Visy has partnered with the City to deliver a new materials recovery facility opposite its glass remanufacturing facility within the precinct. It is the most ambitious integrated resource recovery project undertaken by any local government in Australia and one of the first master planned precincts of its kind in the world.

Lifting productivity and long-term value

Productivity is strengthening. GRP per FTE worker has reached $195,000, ahead of Adelaide and Hobart and closing the gap with Melbourne. Since 2019/20, GRP per worker has grown by 5%, compared with 3% in Brisbane, while productivity across the other Australian capital cities fell by an average of 1%. While this improvement reflects growth from a lower starting base, it still points to a city generating more economic value per worker over time.

Growth here is not only a measure of size. It reflects a city turning ambition into economic substance.

KEY ECONOMIC INDICATORS

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

$55B
GRP (total size of the Gold Coast economy)

25%
GRP growth since 2020/21

350K
Total jobs

83K
Businesses

$24B
Priority Sector GVA (industry contribution to the economy)

~145K
Priority sector FTE jobs

WHAT THIS MEANS

The Gold Coast has built more than scale. It has built a stronger economic base.

The priority now is to turn that momentum into higher productivity, stronger exports and broader recognition of the city's economic maturity. Growth here is no longer only about getting bigger. It is becoming more deliberate, more competitive and more valuable.

"The Gold Coast has evolved well beyond its traditional lifestyle and tourism investment narrative, increasingly emerging as a sophisticated market for founders to scale their businesses. The convergence of entrepreneurial talent, capital, infrastructure, and ambition is creating fertile conditions for innovation and growth. At Admiralty Capital Group, we have been impressed by the calibre of opportunities originating locally and are proud that a significant share of our portfolio comprises Gold Coast companies and founders, reinforcing our conviction that the city represents one of Australia's most compelling, yet still underappreciated, investment markets."

Amanda Andriano
Founding Partner
Admiralty Capital Group

25% GRP GROWTH SINCE 2020/21 TO 2024/25, REINFORCING ONE OF AUSTRALIA'S STRONGEST RECENT GROWTH TRAJECTORIES.

The Gold Coast economy expanded by around 25% between 2020/21 and 2024/25, ahead of Greater Brisbane and the average of other Australian capital cities. This confirms the city's post-COVID growth has been stronger than its peers and reinforces its position as one of Australia's fastest-growing economies.

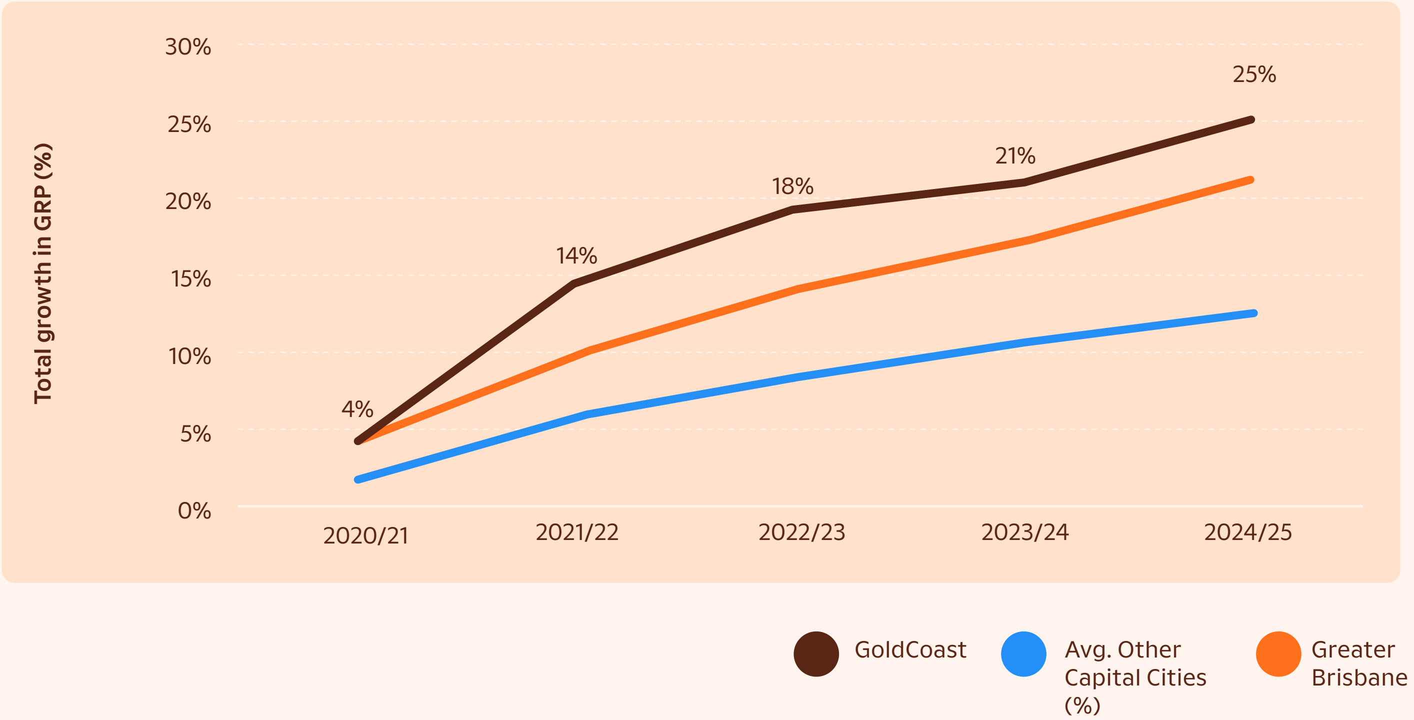

Figure 5.1 Total GRP growth, Gold Coast and benchmark cities, 2020/21–2024/25.
Industry activity shown as GVA; total economy measured as GRP.

Yes to people and talent.

The Gold Coast is increasingly attracting the talent its new economy requires, strengthening the city's capacity to support higher-value growth. This is lifting workforce depth and capability at a time when it matters most, positioning the city to deliver its next phase of economic growth with greater confidence.

Attracting talent for the next growth phase

People are arriving on the Gold Coast with skills, ambition, networks and expectations about the kind of place they want to help build.

One of the hardest, riskiest things a person or family can do is move to a new city and start over. The Gold Coast is full of people who have done exactly that, which helps explain why it feels so welcoming, so entrepreneurial and so open to change.

That openness is reflected in the city's demographic profile. Almost 30% of residents were born overseas and a further 13% come from countries where English is not the first language, adding depth to the city's skills base and strengthening its global outlook.

This gives the Gold Coast a broader talent pool, a wider range of skills and a workforce shaped by people already comfortable with change, movement and opportunity. The priority now is to convert that advantage into stronger workforce depth, skills and talent pipelines for the city's next phase of growth.

Population growth strengthening the workforce

The Gold Coast is home to more than 690,000 people and has grown by more than 10% since 2019/20, faster than the average of Australian capital cities (8%). The city population is projected to grow to around 1 million by 2046. That growth brings pressure, but it also expands the city's capacity to support business growth, workforce depth, consumer demand and new investment.

Net internal migration remains positive but has moderated, a pattern shared across most Australian cities. Sustaining population growth will depend on the Gold Coast's ability to continue attracting people through quality of life, career opportunity and a stronger international profile.

Planning for growth at scale

The City is actively planning for that growth. In March 2026, the City gave in-principle support for the Local Growth Management Strategy, a 20-year framework for accommodating around 185,000 new homes as the city's population grows beyond 1 million by 2046. This work is also informing the new Planning Scheme, which is being developed to help keep the Gold Coast liveable, connected and sustainable as the city grows.

The strategy directs more housing to well-serviced locations along the city's inland spine, including Coomera and Nerang, while protecting environmental and rural areas from urban expansion. The city is working with the Queensland Government to coordinate infrastructure investment and align land use planning with the locations where demand is strongest.

Improving talent retention and deployment

Across the Gold Coast, more than 70 schools, 6 TAFE campuses and 3 universities are building education and skills capacity from early childhood through to postgraduate research.

The Gold Coast already has a substantial tertiary base, with more than 30,000 university students enrolled across Griffith University, Bond University and Southern Cross University in 2025, including more than 9,000 international students. That strengthens not only the city's future workforce pipeline, but also its global connections and education export profile.

KEY PEOPLE AND TALENT INDICATORS

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

690K
Population

10%
Population growth since 2019/20

1M
Population projection by 2046

~30%
Born overseas

2%
Unemployment
(the lowest of any major Australian city)

20%
FTE job growth since 2019/20

WHAT THIS MEANS

Talent is becoming one of the Gold Coast's clearest economic advantages. The city can offer both the quality of life people want and the economic opportunity they need. The focus now is to strengthen workforce depth, education pathways and industry connections so more of that talent is retained, developed and deployed locally. The Gold Coast is no longer only attracting people. It is building the talent base its next growth phase will depend on.

"It had felt so heavy, the life I was living before. Here it's light and free. You know, when you land on the Gold Coast, you are in a place that supports your high-performance. There are athletes all around me, entrepreneurs. When I'm in Sydney, for work, I have to put an energetic field around myself or I will come back feeling that heaviness. But there's an openness here. People invite you in. This represented, for me, an energy shift."

Bella Zanesco
Investor and athlete

Yes to enterprise.

Businesses on the Gold Coast can move quickly from idea to action. A practical, entrepreneurial culture and fewer barriers to access make it easier for founders, firms and investors to move with speed and confidence.

Making it easier for businesses to grow

On the Gold Coast, access matters as much as ambition.

Businesses on the Gold Coast connect more directly to the people and institutions that help good ideas move. That means closer access to government, capital, research, customers, partners and decision makers.

Replacing hierarchy with access

In many larger cities, hierarchy creates friction. On the Gold Coast, access replaces hierarchy. That can change how relationships are built, how decisions are made and how ideas move toward commercial progress. It makes the city commercially viable, especially for founders, growing firms and businesses looking to move quickly from concept to market.

The Gold Coast's commercial property market reinforces that environment, with prime office yields around 7.9% compared with 7% in Brisbane, offering stronger returns than more mature capital city markets.

The scale to support more ambitious firms

The Gold Coast is home to more than 83,000 businesses, up 22% since 2019/20, with mid-sized firms growing by 32% and firms with 200 or more employees increasing by 80% over the same period, from 50 to 90 firms.

Yet fewer than one per cent of local firms are at that larger scale. This means the focus is not only on broadening the business base, but to help more local businesses grow from start-up to scale-up, from small and mid-sized firms to larger employers, and from local capability to firms competing nationally and internationally.

Growing beyond the local market

Those same conditions are even more important in the industries shaping the city's future, where enterprise, research, talent and commercial strength need to connect quickly for local firms to scale. Gold Coast culture is helping more local firms move from early ambition to commercial scale.

Enterprise grows where people, strength and opportunity can find each other quickly and where good ideas are met with a path to action. This is a city entering a more ambitious phase of enterprise:

- more scale-ups
- more exporters
- more research translated into industry outcomes
- more local firms reaching national and international scale
- more local firms competing with the best in the world.

KEY ENTERPRISE INDICATORS

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

83K
Businesses

22%
Business growth since 2019/20

80%
Growth in firms with 200+ employees

32%
Mid-sized firm growth (20-199 employees)

28%
Small firm growth (1-4 employees)

<1%
Firms at 200+ employees

WHAT THIS MEANS

The Gold Coast's enterprise advantage is not only its business base. It is the ease with which people, capital, ideas and opportunity connect. The focus now is to help more firms use that advantage to scale, export and compete beyond the local market. A stronger enterprise base will turn more local ambition into larger businesses, better jobs and longer-term economic value for the city.

"The Gold Coast already has one of Australia's strongest enterprise environments: a large and growing business base, a practical culture and fewer of the barriers that slow firms down elsewhere. The next opportunity is to help more businesses connect to capital, talent, research and markets so more firms grow into stronger employers, exporters and long-term contributors to the city economy. A stronger enterprise base will help turn more local firms into national and international businesses."

Emma Crichton
APAC CEO,
AutogenAI

80% GROWTH IN FIRMS WITH 200+ EMPLOYEES, SIGNALLING EARLY SCALE-UP MOMENTUM

Business growth has occurred across all size categories since 2019/20, with the strongest among firms employing 200 or more people. Small businesses and mid-sized firms have also expanded, showing that the enterprise base is broadening even as the scale-up opportunity remains substantial.

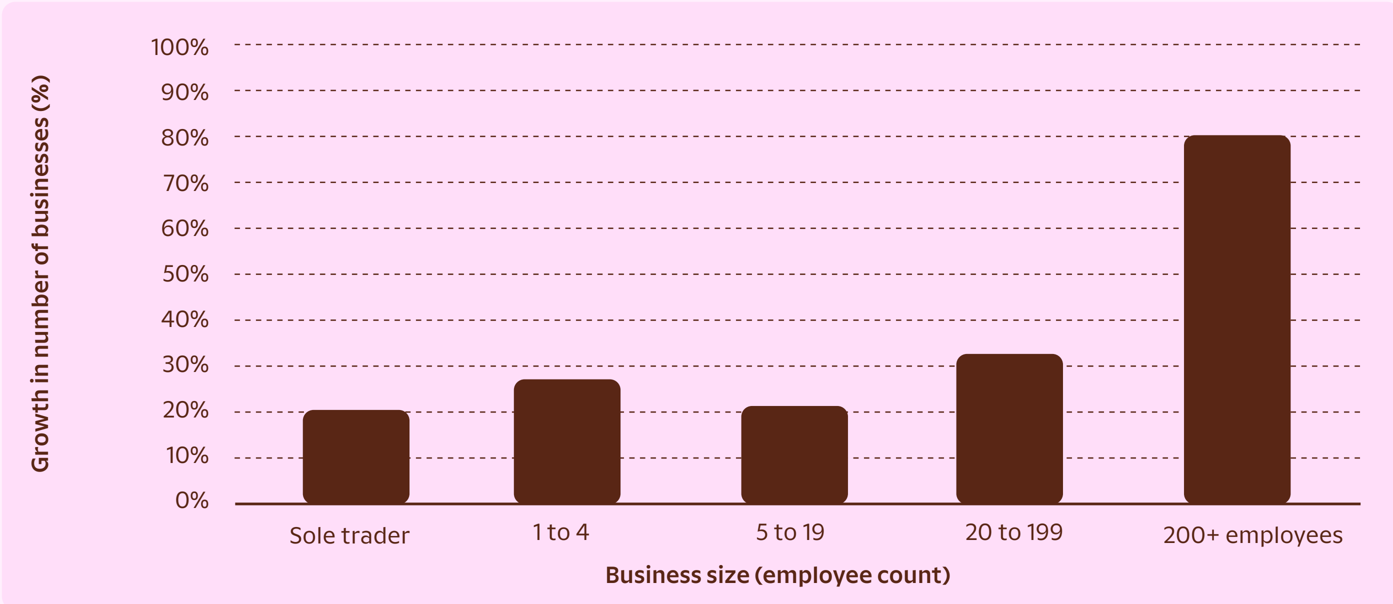

Figure 7.1 Growth in number of businesses by size, Gold Coast, 2019/20–2024/25

Yes to city-shaping projects.

The Gold Coast's project pipeline reflects strong investment confidence. The opportunity now is to direct that investment toward civic, cultural and industry-enabling assets that build long-term city value.

Reshaping how the city functions and grows

More than $23 billion in major projects over $20 million value across 90 developments, together with record crane activity, show a city being reshaped in real time. Yet that pipeline is still heavily concentrated in a small number of locations, with Surfers Paradise, Broadbeach, Palm Beach and Southport accounting for nearly half of all major projects.

Alongside the $23 billion major project pipeline, a broader network of precincts and assets is shaping the Gold Coast's next phase of growth. These projects are not captured in the major project total, but they help define the city's wider economic, civic and industry platform. Key examples include:

- **Yatala–Stapylton Enterprise Area**, expanding advanced manufacturing, logistics and recycling
- **Gold Coast Marine Precinct Coomera**, supporting marine manufacturing and exports to 6 continents
- **Gold Coast Health and Knowledge Precinct Southport**, supporting 16,000 jobs across health, research and innovation
- **Northern Marine Precinct Steiglitz**, complementing existing marine industry and supporting future growth
- **Southport Priority Development Area**, guiding investment in the city centre
- **HOTA Bundall**, strengthening the city's cultural depth and civic identity
- **Robina Central**, emerging as a second major employment and education hub
- **Miami Arts Depot**, supporting a new generation of creators and creative industry activity
- **The coastal tourism strip**, one of Australia's most recognised visitor assets
- **Gold Coast Airport Coolangatta**, connecting the city to domestic and international markets

Broadening investment beyond housing

The current pipeline is still dominated by housing, with 93% of crane activity and 60% of project value concentrated in residential development. That reflects both the scale of demand and the need to expand investment beyond housing. As at June 2026, the Gold Coast has 75 active cranes, up 150% since 2016 and ahead of Brisbane for the first time. It shows that more capital needs to be directed into the infrastructure, civic, cultural and industry-enabling assets that build longer-term economic value.

At Main Beach and The Spit, projects including Mantaray Marina and Residences, the proposed Village East Resort, Marina Mirage redevelopment and the proposed Ritz-Carlton point to a more premium waterfront offer, strengthening the Gold Coast's position in superyacht, marina and higher-value marine tourism activity.

Health and education projects are also shaping the city's next phase. Together, Bond University ($101 million), Coomera Hospital ($2.25 billion), the Gold Coast Life Science Centre ($55 million), the Queensland Ambulance Service Operations Centre ($19.5 million) and Griffith's ADaPT facility ($80 million) represent around $2.5 billion in combined project value. This is strengthening the infrastructure that supports workforce growth, clinical capability, research and the city's longer-term economic resilience.

Unlocking long-term outcomes

The City is not waiting for growth to deliver outcomes. It is aligning land, partnerships and private sector investment to support the timely delivery of the assets and precincts needed for the city's next phase of growth.

This includes projects such as:

- Advanced Resource Recovery Centre (ARRC)
- Gold Coast Arena
- Miami Arts Depot
- Shadowbox Studios
- Titans High Performance Centre
- Gold Coast Music Hall
- GreenHeart
- Surfers Paradise Revitalisation
- Miami Action Hub and Community Precinct
- Carrara Sports Precinct
- The Oceanway
- Northern Marine Precinct at Steiglitz.

These projects create more active precincts, support local business and strengthen long-term value.

Building long-term economic value

These are not just construction projects. They are shaping how the city functions, what it can support and how it competes for investment, talent and visitors at a national and global level, while strengthening liveability and returning broader long-term value to the community.

Invest Gold Coast led projects including the Gold Coast Arena, Miami Arts Depot, Titans High Performance Centre and Shadowbox Studios are projected to generate a combined $400 million in annual economic output. Together, they are expected to support more than 7,100 construction jobs and 2,800 ongoing jobs, reinforcing their role as major city-shaping investments.

This is not only about what gets built. It reflects how the Gold Coast is shaping its next phase of growth. The mix of projects will help determine whether the Gold Coast's next phase builds additional housing alone, or the catalytic precincts, infrastructure and civic assets the new Gold Coast economy requires.

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

75
Active cranes record high, surpassed Brisbane

150%
Crane growth since 2016

$23B
Across 90 major projects (projects over $20M)

93%
Crane activity residential

60%
Project value in residential

$2.5B
Total value of health and education projects

WHAT THIS MEANS

The Gold Coast has a visible pipeline of confidence. That confidence needs to be converted into a broader mix of civic, cultural, infrastructure and industry-enabling projects that strengthen long-term economic value. The strongest projects expand the city's capacity to compete, attract capital and support what comes next.

"This facility will cement the Gold Coast's position as a major destination for local and international film and TV production. Beyond the jobs and inward investment which the studio will generate, we see this as the foundation of a truly world class creative hub. The result will be a place that inspires the next generation of filmmakers and everyone who works to bring their stories to life and grows the Gold Coast's creative economy."

Mike Mosallam
COO
Shadowbox Studios

CRANE ACTIVITY INDEX REACHED 250 IN Q1 2026, MEANING ACTIVITY IS 2.5 TIMES THE 2016 LEVEL

The Gold Coast's crane activity index reached 250 in Q1 2026, with Q1 2016 set as the baseline of 100. This means crane activity is now 2.5 times its 2016 level, up 150% and ahead of every other major Australian city. Crane activity is a visible signal of development momentum, housing demand and the scale of city-shaping investment now underway.

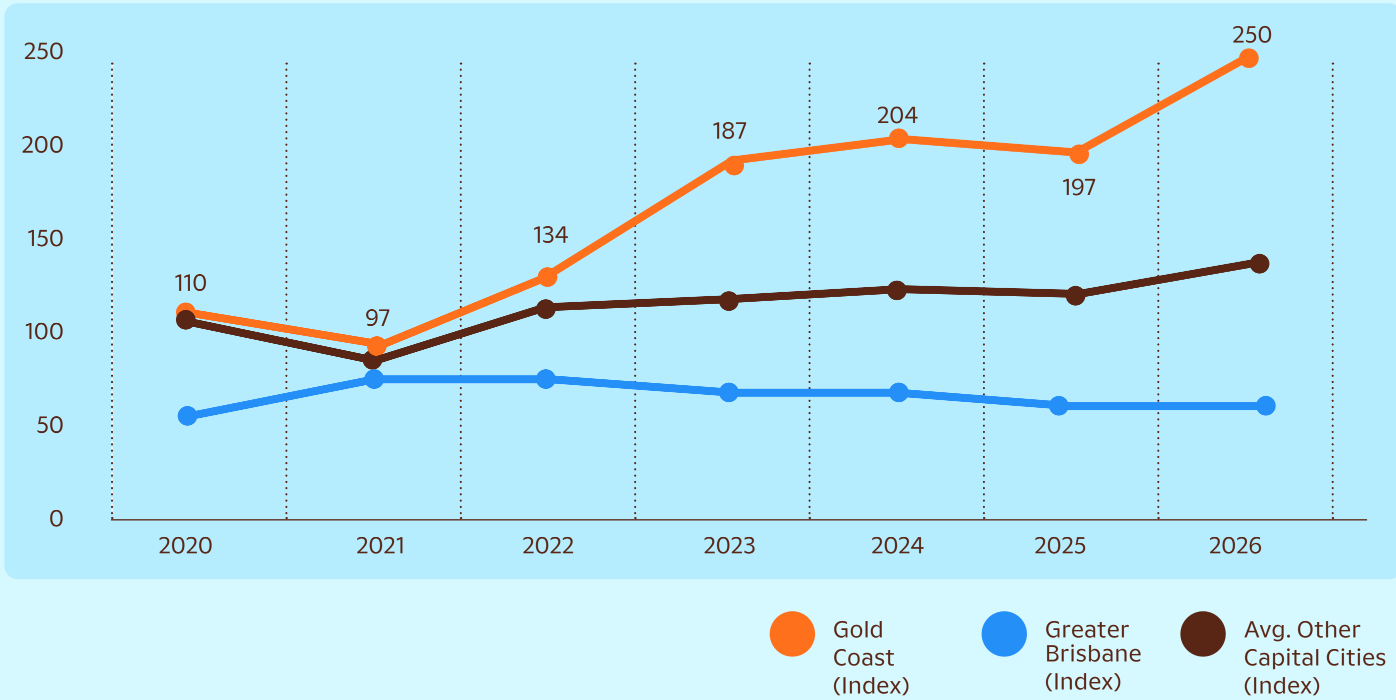

Figure 8.1 Crane activity index, Gold Coast and benchmark cities, Q1 2020-Q1 2026

Yes to infrastructure and connectivity.

The Gold Coast is building the infrastructure its next phase of growth depends on, and how well it aligns with that growth will shape how the city moves, connects and competes. Infrastructure is not only supporting growth. It is helping shape what the Gold Coast becomes next.

Infrastructure that keeps pace with growth

As the Gold Coast grows, infrastructure becomes more central to how the city competes. Around $6 billion in committed transport investment is already complete or underway on the Gold Coast, excluding the $5.7 billion Logan to Gold Coast Faster Rail project. The $3.5 billion Coomera Connector Stage 1 is part open, the $1.5 billion Light Rail Stage 3 to Burleigh Heads is close to complete, and the City invested around $0.5 billion in transport infrastructure in 2024/25.

Together, these investments are strengthening capacity in a city where most residents already work locally and where efficient movement matters across jobs, housing, education, tourism and business growth. Faster Rail will also improve connectivity between the Gold Coast and Brisbane, including new stations at Merrimac, Pimpama and Hope Island.

Beyond the projects already funded and underway, the City and its partners have preserved the corridors that will shape how the Gold Coast moves next.

These include:

- transport priority measures to improve east–west connectivity between key employment centres
- the preserved heavy rail corridor from Varsity Lakes to Gold Coast Airport
- future stages of the Coomera Connector, designed and ready to proceed as funding is secured.

Connectivity is central

These infrastructure projects make the Gold Coast easier to move through, easier to reach and easier to do business in. This is critical in a city where 86% of residents already work locally and where the share of commuting to Brisbane has fallen from 13% to 12% since 2016.

Gold Coast Airport is central to that advantage, with 6.4 million passengers in the year to April 2026 and international passenger growth of 22%, reinforcing its role as one of the city's most important economic gateways. Queensland's flat 50 cent fare adds to that edge by giving Gold Coast commuters some of the lowest public transport costs of any major Australian city.

Infrastructure that supports the next phase

The Gold Coast is not only keeping pace with growth. It is building the physical and digital systems that will shape how the city competes next.

In 2025, the City delivered an almost $1 billion capital works program across roads, water, sewerage, stormwater, waste, parks, coastal protection, community facilities and transport. The city also operates SurfNetwork, a high capacity fibre optic network, spanning more than 100 kilometres with over 300 connection points.

The next layer is already taking shape. Airservices Australia projects annual drone flights in Australian skies will grow from 1.5 million in 2023 to more than 60 million by 2043, with 77% of that growth driven by transport and logistics. The city is also beginning to explore how a wider range of autonomous mobility and logistics technologies could shape future urban transport and local delivery services.

The City has signed a memorandum of understanding with Skyports Infrastructure to collaborate on advanced air mobility infrastructure across the city. This builds on a previous strategic collaboration between Skyports, Alt Air and EVE Air Mobility to deliver electric vertical take-off and landing (eVTOL) operations across Queensland and New South Wales.

These capabilities also matter for resilience. In flood and bushfire events, drones can provide rapid geospatial intelligence, helping emergency teams assess damage, identify access routes and prioritise response. Ensuring the city's digital infrastructure and workforce capability keep pace with these shifts will be critical to capturing their value.

Natural assets protect real economic value

- The $24 million Palm Beach artificial reef helped defend the southern coastline during Tropical Cyclone Alfred in 2025, showing that coastal infrastructure provides real economic protection.
- The Northern Beaches Protection Project aims to stabilise beach widths, protect natural and built assets, and support a more connected coastline.
- The Gold Coast's beaches contribute almost $4 billion in economic value, while waterways, hinterland access and investments such as the Oceanway help protect what makes the city distinctive and support tourism, liveability and investment attraction.

Better aligning infrastructure with growth

The priority now is to align infrastructure investment with population growth, housing, precinct development, industry and visitor demand. Connected cities compete. The Gold Coast's ability to move people, goods and ideas more effectively will be central to its long-term competitiveness.

KEY INFRASTRUCTURE INDICATORS

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

$6B
Committed transport infrastructure

$4B
Economic value added by Gold Coast beaches

~$1B
City capital works program 2024/25

6.4M
Airport passengers (year to April 2026)

86%
Residents who work locally

100km
SurfNetwork fibre optic coverage

WHAT THIS MEANS

Infrastructure will determine whether the Gold Coast's next phase of growth is more productive, more connected and more competitive. The priority now is to align transport, digital, natural and housing-enabling infrastructure with population growth, precinct development and industry need, while preparing for the next wave of movement, freight and connectivity. For the Gold Coast, early investment in how people, goods and ideas move will create long-term advantage.

"There's a real soul to the Gold Coast, and that's what makes it special. While the city has changed enormously over time, that sense of openness and possibility has never been lost, it's simply evolved. My connection started as a child, driving up from Sydney for school holidays, before my parents made the move and embraced that spirit of 'you can be who you want and do anything you want'. I finished my education and began my career here, then spent 15 years away not knowing when I would return. I'm extremely fortunate to be living here now with my own family and working at the airport supporting the city's growth. It takes courage to have vision for a growing city, and the Gold Coast has proved that's who we are. The Gold Coast has evolved into far more than a tourism destination. It's a global destination attracting innovation, investment and opportunity."

Amelia Evans
CEO
Queensland Airports Limited

Yes to priority sectors.

The Gold Coast's new economy will be shaped by sectors with proven performance and room to grow. These sectors will drive future investment, productivity and global relevance for the city.

Driving the Gold Coast's economic shift

Together, the 6 priority sectors contribute nearly $24 billion in GVA, equivalent to approximately 43% of the Gold Coast's total GRP. These sectors also support around 145,000 FTE jobs, accounting for more than 50% of total employment.

Many have recorded strong growth since 2012 and accelerated further after COVID, particularly across health, professional services, advanced manufacturing, technology, education and knowledge-based industries.

Growth across the 6 priority sectors varies, with stronger and more sustained gains in health and wellbeing, knowledge economy and building future industries, signalling a shift toward higher-value sectors.

Aligning strength with global demand

It is time to back the industries where the Gold Coast has real strength, clear demand and the room to scale. That strength is already visible in real places across the city, with activity concentrated in locations such as:

- Health and knowledge at Southport
- Marine and manufacturing around Coomera and Yatala/Stapylton
- Tourism and events across the coastal strip
- Culture at HOTA in Bundall
- Education and enterprise in Robina, Southport and Coolangatta
- Creative industries emerging in Miami
- Screen capability growing in Yatala/Stapylton
- Global connectivity through Gold Coast Airport in Coolangatta.

This is a deliberate economic positioning strategy: identifying where the Gold Coast has the foundations to compete, and backing the sectors most likely to lift productivity, attract investment and grow exports.

Cities that try to do everything compete with no one. The Gold Coast's advantage is knowing where to focus.

Matching growth to competitive advantage

As the city evolves, the way it defines and measures its priority sectors should keep pace with where investment, demand and commercial strength are growing. The 6 priority sectors are:

1. Knowledge economy
2. Health and wellbeing
3. Building future industries
4. Tourism, sport and major events
5. Education and future skills
6. Screen and game production.

Scaling more deliberately

With the right investment, infrastructure, skills and partnerships, these sectors can drive a more competitive and more globally connected economy. They are where the Gold Coast's next gains in productivity, exports, skills and investment are most likely to come from.

From here, the focus is to back these sectors with greater intent, connecting local strength to demand and helping more firms scale into national and international competitiveness.

WHAT THIS MEANS

The Gold Coast's priority sectors already account for nearly half of the city's GRP and more than 50% of all employment. The task now is to strengthen exports, workforce depth, infrastructure and partnerships so these sectors can scale with greater confidence. These are the industries most likely to determine whether the Gold Coast's next phase of growth creates lasting economic value, not just additional scale.

THE KNOWLEDGE ECONOMY

$7.9B GVA	**14%** Share of city GRP (or GVA)
31K FTE jobs	**11%** Total FTE jobs
19% GVA growth since 2020/21	**66%** GVA growth since 2011/12

HEALTH AND WELLBEING

$5.2B GVA	**9%** Share of city GRP (or GVA)
42K FTE jobs	**15%** Total FTE jobs
18% GVA growth since 2020/21	**115%** GVA growth since 2011/12

BUILDING FUTURE INDUSTRIES

$4.4B GVA	**8%** Share of city GRP (or GVA)
23K FTE jobs	**8%** Total FTE jobs
16% GVA growth since 2020/21	**35%** GVA growth since 2011/12

TOURISM, SPORT AND MAJOR EVENTS

$2.9B GVA ($3.1B RTSA tourism GVA 023/24)	**5%** Share of city GRP (or GVA)
20K FTE jobs	**7%** Total FTE jobs
18% GVA growth since 2020/21	**16%** GVA growth since 2011/12

EDUCATION AND FUTURE SKILLS

$2.9B GVA	**5%** Share of city GRP (or GVA)
25K FTE jobs	**9%** Total FTE jobs
6% GVA growth since 2020/21	**41%** GVA growth since 2011/12

SCREEN AND GAME PRODUCTION

$420M GVA	**1%** Share of city GRP (or GVA)
2.5K FTE jobs	**1%** Total FTE jobs
77% GVA growth since 2020/21	**61%** GVA growth since 2011/12

Unless otherwise indicated, all data from 2024/25 (1 July 2024 - 30 June 2025)

Knowledge economy.

The Gold Coast's knowledge economy is a key driver of how the city competes beyond population growth alone. It is producing more ideas, more services and more firms that can scale beyond the local market.

Knowledge driving competitiveness

Knowledge economy contributes $7.9 billion (14% of GRP) and supports around 31,000 FTE jobs (11% of the workforce). GRP growth of 19% since 2020/21 reflects one of the city's fastest expanding sectors and a clear shift toward a more sophisticated, knowledge-driven economy.

This includes:

- professional, scientific and technical services, including legal, accounting, consulting, engineering, architecture and management advisory services
- computer system design and related services, including software development, systems integration and IT consulting
- financial and insurance services, including banking, superannuation and emerging fintech activity
- administrative services supporting business operations across the wider economy.

Professional and digital services at scale

The focus now is to deepen those connections further, linking universities, investors, founders and employers so more talent is retained locally and more businesses scale.

The $5 billion Gold Coast Health and Knowledge Precinct gives that ecosystem physical scale and stronger commercial depth. Within it, Cohort Innovation Space supports more than 50 founders through specialised programs, a collaborative community and direct access to researchers, entrepreneurs and industry experts. Across 3 buildings and more than 2,500 square metres, it provides coworking desks, private offices, PC1 and PC2 scientific laboratories, an AI lab, a 150-person event space and a podcast and live streaming studio.

Since opening in 2019 it has grown into one of the largest innovation spaces in Queensland, anchored by the Gold Coast University Hospital's Centre for Digital Healthcare and Griffith University's Innovation Centre.

Demonstrating global reach

AutogenAI chose the city as its Asia-Pacific base for its generative AI platform that helps organisations write winning bids, proposals and grants. FleetGuru.ai, founded locally, has built an AI-powered fleet maintenance platform trusted by more than 12,000 service providers across Australia and New Zealand. These are not outliers. They reflect the kind of business the Gold Coast's access, culture and growing knowledge base are increasingly able to produce and scale.

Growing more export driven firms

Knowledge economy also plays a cross-sector enabling role, amplifying complementary industries in ways not fully evident in economic output alone. Professional and technical services support:

- investment decisions
- project delivery
- regulatory approvals
- commercial strategy across every other priority sector.

Computer system design and IT consulting increasingly connect into health, manufacturing, screen and education.

Knowledge economy is not only a large sector. It is part of the infrastructure that allows the Gold Coast's other priority sectors to deepen, scale and compete beyond the local market.

Unless otherwise indicated, all data from 2024/25 (1 July 2024 - 30 June 2025)

$7.9B
GVA

14%
Share of city GRP (or GVA)

31K
FTE jobs

11%
Total FTE jobs

19%
GVA Growth since 2020/21

66%
GVA Growth since 2011/12

WHAT THIS MEANS

Knowledge economy is not an isolated industry. It is the connective tissue of a more advanced city economy. Every priority sector depends on the professional, financial, technical and digital capabilities that help firms grow, projects move and industries compete. Strengthening this sector will not only grow a major industry but lift the performance of the wider economy by helping more Gold Coast businesses scale, innovate and build long-term value.

"There's just so much growth, in business and in talent. It used to be hard to recruit. Now we're finding all these amazing people coming up, or who were already here and now they want to be part of something — not just work remotely. To have all these options here on the new Gold Coast, to work for a company like this in a location like this, scaling up, to have that option, to work hard, you know, aspire to something great from a career perspective, but also have balance where your family enjoys living there. It's rare. You know, quite often when you're hustling in a career, you know, your family cannot have the benefits of that. But here on the Gold Coast, those that are striving for that, it's here. And it feels like we're winning."

Eden Shirley
Founder and Managing Director
Fleetguru.ai

Health and wellbeing.

Health and wellbeing is becoming one of the Gold Coast's most advanced economic strengths. It combines care, research, training and commercialisation in ways that can create long-term value well beyond service delivery alone.

The Perry Cross Spinal Research Foundation shows how the Gold Coast is translating lived experience, research and clinical capability into globally significant health innovation. Founded after Perry was paralysed in a rugby accident in 1994, the foundation has helped raise more than $42 million to support spinal research. It is now partnering with Griffith University on a world-first Nerve Bridge Transplantation and Rehabilitation Human Clinical Trial for 30 people at Gold Coast University Hospital, aimed at restoring movement in people with spinal cord injuries.

One of the city's most advanced sectors

Health and wellbeing contributes $5.2 billion (9% of GRP) and supports around 42,000 FTE jobs (15% of the workforce). GRP growth of 18% since 2020/21 reflects one of the city's largest and most advanced sectors, spanning care, research, training and medtech.

It is also one of the most distributed sectors in the city, with activity extending from hospitals and medical services into residential care, social assistance, allied health and community-based services.

The Gold Coast Health and Knowledge Precinct shows how health and wellbeing is becoming more than a service sector. It is emerging as one of the city's strongest platforms for research, innovation and commercialisation.

Bringing together more than $5 billion in health, education, industry and supporting infrastructure across 200 hectares, the precinct is home to more than 16,000 workers and more than 1,000 researchers, alongside a thriving community of clinicians, academics, entrepreneurs, students and global industry partners.

Anchoring global relevance

The precinct is building international relevance through specialist clinical training, simulation and applied health technology. NeuTex, based at Lumina within the precinct, attracts doctors from across the Asia-Pacific, while the precinct supports research in medical devices, AI, robotics and 3D-printed anatomical models.

BIVACOR reinforces that same pattern. A clinical stage medical device company that has developed an artificial heart, it is based at the precinct and cites Griffith University's advanced blood compatibility testing as a key reason for locating here.

In 2025, its Total Artificial Heart advanced through a major United States regulatory milestone, underscoring the global significance of technology developed on the Gold Coast.

Translating opportunity into commercial outcomes

The focus now is to turn that scale into stronger commercial outcomes by deepening connections between research, industry and investment, building global partnerships and ensuring the workforce keeps pace with the sector's growth.

KEY INDICATORS

Unless otherwise indicated, all data from 2024/25 (1 July 2024 - 30 June 2025)

$5.2B
GVA

9%
Share of city GRP (or GVA)

42K
FTE jobs

15%
Total FTE jobs

18%
GVA Growth since 2020/21

115%
GVA Growth since 2011/12

WHAT THIS MEANS

Few cities of the Gold Coast's size have a health precinct attracting global headquarters, surgical training centres and clinical trials in the same location.

The priority now is to convert that concentration into a stronger pipeline of commercialised health innovation, not only better care. This is one of the city's most important long-term economic strengths, shaping outcomes across care, research, workforce development and innovation.

"There is something about the Gold Coast, an energy, an ambition, a frontier spirit. I wonder if there is anywhere else, anywhere in the world where my story could have been possible. I've been able to reinvent myself here, twice. The chance to be a doctor, when no other place would take that chance. To do spinal cord research in this way. Every day, when I think of things to be grateful for, I am thankful for where we live."

Dinesh Palipana
Doctor, researcher, and entrepreneur

Building future industries.

Building future industries is where the Gold Coast turns engineering, production and industrial strength into export advantage. From marine and advanced manufacturing to space and circular economy activity, this is where the city is making more of what the world will continue to need.

PWR began on the Gold Coast and now supplies cooling technology to every Formula 1 team in the world, a trajectory recognised when it was named Queensland Exporter of the Year in 2025.

Strengthening advanced manufacturing

Building future industries contributes $4.4 billion (8% of GRP) and supports more than 23,000 FTE jobs (8% of the workforce). GVA growth of 16% since 2020/21 and manufacturing exports exceeding $5 billion reflect a sector building more value through industrial production and globally traded goods.

This spans:

- Luxury motor yachts built by Maritimo and Riviera
- PWR delivering high performance cooling solutions for Formula 1, NASCAR and V8 Supercars
- Aerospace and defence sectors
- Sovereign capability with Gilmour Space Technologies and Starbound Space Solutions.

This activity is concentrated across the Gold Coast Marine Precinct at Coomera and the Yatala/Stapylton Enterprise Area, supported by industrial land, logistics access and export strength.

Ryan Aerospace shows how that strength translates into globally competitive production. Based on the Gold Coast, the company designs and manufactures flight simulators supplied to the U.S. Air Force, Army and Navy, with approvals from the United States Federal Aviation Administration reinforcing the city's advanced manufacturing position.

Growing a globally competitive marine industry

The Gold Coast Marine Precinct at Coomera is one of the most concentrated marine industrial zones in the Asia-Pacific. Across 250 hectares, more than 500 companies and 6,000 workers operate alongside major facilities including The Boat Works and Gold Coast City Marina & Shipyard. The sector generates more than $2 billion annually and exports vessels to 6 continents.

The superyacht segment is a high-value component of the Gold Coast's marine industry, contributing an estimated $279 million in GRP and supporting nearly 2,500 jobs. Visiting vessels generate significant local spend and ongoing demand for maintenance, refit and marine services. For example, a 95-metre superyacht docked at Southport for 2 months generated around $1.5 million in local spending.

That recurring demand flows through local facilities, reinforcing the Gold Coast's position as a leading superyacht hub in the Southern Hemisphere. Targeted investment in berthing and supporting infrastructure has the potential to capture more of this value as the sector grows.

Linking production to export market

These capabilities are reaching significant milestones. In 2025, Gilmour Space Technologies launched its first satellite and completed the first launch of an Australian-designed rocket from Australian soil, with further tests planned for 2026. Starbound Space Solutions adds depth with AI tools that streamline engineering and compliance processes for space programs.

The circular economy is another emerging growth area in the corridor, supported by the Advanced Resource Recovery Centre.

Scaling while the advantage is there

The sector is built on a broad industrial base spanning manufacturing, utilities and waste management. Scaling this will require:

- Access to space for industrial and marine activity, particularly across key corridors and precincts
- A workforce pipeline aligned to advanced manufacturing and marine demand
- Stronger supply chain connections linking local producers to global markets
- Export logistics that support firms moving from domestic production to global competitiveness.

The Gold Coast has the precinct infrastructure and workforce depth to support the next generation of advanced manufacturing, marine, defence and circular economy activity.

Unless otherwise indicated, all data from 2024/25 (1 July 2024 - 30 June 2025)

$4.4B
GVA

8%
Share of city GRP (or GVA)

23K
FTE jobs

8%
Total FTE jobs

16%
GVA Growth since 2020/21

35%
GVA Growth since 2011/12

WHAT THIS MEANS

Building future industries gives the Gold Coast a stronger production base, tied to exports, industrial strength and internationally significant supply chains. The focus now is to build on that advantage while it is still in place. Investing in enabling infrastructure, skills, supply chain connections and export pathways will help these sectors scale with confidence and make the wider economy more productive and more competitive.

"The Gold Coast is emerging as one of Australia's most dynamic centres for advanced manufacturing, driven by innovation, skilled talent and a growing culture of entrepreneurship. We are seeing increasing confidence in local capability, with businesses designing and manufacturing sophisticated products and solutions that are contributing to both economic growth and the city's global reputation."

John Christie
Founder and director,
ModnPods

Tourism, sport and major events.

Tourism, sport and major events remain one of the Gold Coast's most important economic engines, but their value now runs deeper than visitation alone. This sector plays a central role in generating economic activity, global recognition and industry growth.

Mondrian, with hotels in some of the world's most iconic locations, chose the Gold Coast for its first Australian property. It did not come for the beaches, but for the city's growing cultural depth and creative energy.

From global profile to economic value

Tourism, sport and major events contribute $2.9 billion in GVA (around 5% of total GRP) and support almost 20,000 FTE jobs (7% of the workforce). Separate Tourism Research Australia data places tourism GVA at $3.1 billion in 2023/24. While the sector is 16% larger than in 2011/12, GVA has risen 18% since 2020/21, reflecting stronger recent growth from a lower post-COVID base. In 2025, the sector attracted around 15 million visitors and generated almost $9 billion in visitor expenditure.

This is the Gold Coast's most outward-facing sector, converting global attention into local economic activity and strengthening the city's international profile.

Business events and sport add value

The Gold Coast Convention and Exhibition Centre combines venue scale, accommodation density and transport connectivity within a compact footprint, positioning the city as one of Australia's strongest destinations for business events and large-scale gatherings.

More than 900 business events are held each year, attracting over 160,000 delegates, reinforcing the city's ability to host national and international conferences at scale and connect them to a broader visitor and business ecosystem.

Sport reinforces this advantage. The city's climate, infrastructure and proximity to leading health and sports science facilities support a concentration of athletes, coaches and high-performance activity. Brisbane 2032 Olympic and Paralympic Games will accelerate this further, building on foundations already in place.

Sector-wide economic contribution

Unlike other priority sectors, tourism, sport and major events draw value from across multiple industries. Accommodation, food and beverage services, arts and recreation, transport, retail and related activity all contribute.

This structure means the sector's true economic value extends well beyond headline figures, supporting supply chains, small businesses and employment across the city.

Infrastructure and capacity

Continued investment in cultural and event infrastructure will strengthen the city's ability to capture higher-value activity. Projects such as the proposed Gold Coast Arena and Gold Coast Music Hall will expand event capacity, support the Brisbane 2032 Olympic and Paralympic Games legacy and reinforce the city's position as a leading destination for sport, entertainment and major events.

KEY INDICATORS

Unless otherwise indicated, all data from 2024/25 (1 July 2024 - 30 June 2025)

$2.9B
GVA ($3.1B RTSA Tourism GVA in 2023/24)

5%
Share of city GRP (or GVA)

20K
FTE jobs

7%
Total FTE jobs

18%
GVA Growth since 2020/21

16%
GVA Growth since 2011/12

WHAT THIS MEANS

Tourism, sport and major events remain one of the Gold Coast's most important economic engines, but their value now runs deeper than visitation alone. This sector drives economic activity, global recognition and industry growth across the city.

"I feel like every Aboriginal person has an obligation to keep culture alive. Whether you're working in the space or outside it, in community or in business, working for government, we can keep culture alive in our own way — especially if you've grown up here and you've walked the sands here and walked the mountains, swam in the creeks.

I take every opportunity I can to share it. When we tell our stories internationally, at tourism conferences, we feel it... these are meaningful experiences people are looking for."

Kieran Chilcott
CEO of Kalwun Development Corporation and Artists

Education and future skills.

Education and future skills are central to the workforce the Gold Coast's new economy will depend on. Across universities, TAFE and training providers, the city is strengthening the talent pipeline shaping its future industries, innovation base and global connections.

Three universities, one city. One produces more Olympians than any university outside Stanford, another leads Australia in teaching quality, and a third is reimagining how study is delivered through an immersive 6-week model, recognised as the most improved in Oceania.

Building the workforce behind future growth

Education and future skills contribute $2.9 billion (around 5% of GRP) and support about 25,000 FTE jobs (9% of the workforce). Growth of 6% since 2020/21 and 41% since 2011/12 reflects the sector's expanding role in the city's economy.

That growth is strengthening workforce depth, applied research and the talent pipeline, increasingly aligned with the industries shaping the Gold Coast's future, including health, manufacturing, screen, technology and knowledge economy.

Education strength with national standing

Griffith University, Bond University and Southern Cross University each contribute distinct strengths:

- **Griffith University** is ranked in the top 2% of universities globally for some disciplines and produces more Olympians than any university other than Stanford
- **Bond University** consistently records the highest student satisfaction scores in Australia
- **Southern Cross University** adds regional and applied education strengths, particularly in hospitality, tourism and environmental science.

Together, Griffith University, Bond University and Southern Cross University enrolled over 30,000 students across their Gold Coast campuses in 2025. That is a significant tertiary base for a city of the Gold Coast's size, equivalent to about 4.5% of the population.

While that share has eased slightly as the city has grown, total enrolments have remained broadly stable over the past 5 years, reinforcing the role of the city's universities as an important source of workforce depth, research capability and future skills.

TAFE Gold Coast operates across multiple campuses, producing the trades, technicians, chefs, carers and specialist workers that support the city's construction, tourism, health, marine and manufacturing sectors. The sector as defined also includes preschool and school education, English language, and other vocational, adult and community education, giving it a reach that extends from early childhood through to lifelong learning and professional development.

Education and future skills is not only about universities. It is about the full pipeline of talent and skills the city needs to support a more advanced economy.

Global connections through education

The Gold Coast's international student population adds a further dimension. Across Griffith University, Bond University and Southern Cross University, international enrolments at Gold Coast campuses increased from 6,077 in 2021 to 9,006 in 2025. That growth has strengthened the city's cultural diversity, deepened its global networks and reinforced education's role as both a workforce pipeline and an increasingly important export sector.

Education and training account for 37% of international export growth on the Gold Coast, reinforcing the sector's contribution to the city's trade profile as well as its talent base.

Retaining more graduates locally

The priority now is to connect graduates more directly to local employers, industry precincts and career pathways so more of them choose to build their working lives here.

Retaining more graduates locally will require:

- Stronger industry placement programs that give students direct experience in Gold Coast businesses
- Clearer career pathways linking qualifications to local employment in priority sectors
- Deeper employer engagement to ensure workforce needs are reflected in what is taught
- More visible graduate retention strategies that give talented people a reason to stay.

KEY INDICATORS

Unless otherwise indicated, all data from 2024/25 (1 July 2024 - 30 June 2025)

$2.9B GVA	**5%** Share of city GRP (or GVA)
25K FTE jobs	**9%** Total FTE jobs
6% GVA Growth since 2020/21	**41%** GVA Growth since 2011/12

WHAT THIS MEANS

The Gold Coast is building the talent its new economy needs. Three universities, TAFE and a growing training network are producing graduates with the skills the city's priority sectors are seeking. The focus now is to strengthen the connection between education and employment, so more graduates stay, more employers find the skills they need and more of that talent is deployed locally. The city's new economy will depend not only on attracting talent, but on retaining and using it more effectively across the industries it wants to grow.

"If I had to choose one word to try to summarise the difference on the Gold Coast, it would be optimism. Having lived and worked in and around a lot of places and people, I think the Gold Coast is one of Australia's most optimistic places. There's a lot of people who have come to create new and better opportunities for themselves and for their families - whether that be an opportunity to be able to go to the beach on Sundays, or whether it's to start a company, to try something new, to study, or to remake your life. There are a lot of small business owners here, and you have to be pretty optimistic to start a business."

Carolyn Evans

Vice-Chancellor,
Griffith University

Screen and game production.

Screen and game production are giving the Gold Coast a stronger creative and globally visible economic edge. With major studio infrastructure, experienced crew and growing digital strength, this is one of the city's clearest signals of how culture, technology and exports are beginning to converge.

Over 3 decades, the Gold Coast has built a specialised, internationally recognised screen industry, with the crew depth and studio infrastructure to deliver blockbuster productions. The Gold Coast received a Highly Commended award in the City of Film category at the 2026 Global Production Awards in Cannes.

A globally recognised production centre

Screen and game production contributes $420 million in GVA and supports about 2,500 FTE jobs. While the sector is 61% larger than it was in 2011/12, growth has accelerated in recent years, with GVA rising 77% since 2020/21 from a lower post-COVID base. Over the past 5 years, City-supported productions have generated more than $1 billion in production expenditure and supported nearly 7,000 jobs, showing the sector's wider value to the Gold Coast economy.

This strength is built across production, post-production, game development, digital content, creative technology, studio infrastructure and specialist crew. The Gold Coast has grown from a secondary production location into one of the country's most significant screen centres. The city is a credible first choice production base, particularly where incentives, studio infrastructure and currency settings align.

Few sectors of this size deliver that level of economic return, supply chain activation or global visibility for the city.

Building permanent infrastructure

The city's studio infrastructure includes:

- Village Roadshow Studios and Pinnacle Studios, which together provide 12 sound stages
- The planned Shadowbox Studios in Yatala with up to 10 sound stages, workshops, office space, backlot and training facilities is spread across a 22-hectare City-owned site (Phase 1 is due to open by 2029)
- Miami Arts Depot which will transform a 40,000 square metre former City depot site into a mixed-use creative industries precinct connected to the Gold Coast Light Rail, supporting screen pre and post-production, digital industries, arts, culture and housing.

Together, these facilities will give the Gold Coast one of the most significant concentrations of studio infrastructure in the Southern Hemisphere.

Deepening crew strength and creative depth

The Gold Coast's crew base is one of the city's strongest competitive assets. Experienced across film, television, commercials and digital content, the local workforce has delivered productions at every scale. That depth is increasingly supported by training pathways through local universities, TAFE and vocational education, connecting the next generation of screen professionals to a thriving vibrant industry.

Game production and interactive digital content add a further dimension. While still emerging, the sector's creative and technical talent overlaps significantly with screen, visual effects and digital design. The Gold Coast's lifestyle and cost advantages are attracting independent studios and digital creators.

PlaySide Studios, one of Australia's largest game producers, expanded to the Gold Coast in response to Queensland's competitive Post, Digital, and Visual Effects Incentive (PDV) incentive and the city's pipeline of skilled graduates, adding game development capability alongside the city's established screen production strengths.

Retaining more production value locally

According to the Screen Australia Drama Report, in 2024/25 Queensland's screen expenditure reached $924 million, with around 75% of this spent on the Gold Coast. The focus now is to retain more of the economic value generated by screen production within the Gold Coast.

That means building stronger post-production infrastructure and skills so more post, digital and visual effects work stays local, expanding training pathways that keep the workforce pipeline ahead of demand, deepening the connection between screen, game production and the city's broader creative industries, and ensuring studio infrastructure is matched by the housing, transport and services that support a growing production workforce.

Attracting productions is part of our story. The next step is to retain more of the value they create locally, through skills growth in post-production, games, visual effects, digital content, creative technology,and related services. The current priority sector classification framework does not fully capture adjacent creative, digital and technical activity, meaning the sector's true economic contribution is likely larger than the data currently shows.

KEY INDICATORS

Unless otherwise indicated, all data from 2024/25 (1 July 2024 - 30 June 2025)

$420M GVA	**1%** Share of city GRP (or GVA)
2.5K FTE jobs	**1%** Total FTE jobs
77% GVA Growth since 2020/21	**61%** GVA Growth since 2011/12

WHAT THIS MEANS

Screen and game production are giving the Gold Coast a stronger creative and globally visible economic edge. In key international markets such as the United States, Canada and Europe, film and television elevate the city's reputation more than any other industry.

The opportunity is to capture more of the value those productions generate by building the finishing infrastructure that keeps post-production, sound and editing on the Gold Coast. This sector is not only attracting productions. It is helping shape a more creative, exportable and internationally recognised city economy.

"The Gold Coast has always been an attraction for the film and screen industry, but in recent years it has cemented its position as Australia's primary city for the industry thanks to our world-class facilities at Village Roadshow Studios, our experienced and talented crew, the vast variety of locations, the desirability of our incentives, and the emergence of bespoke creative hubs. The industry extends beyond the screen, and has a positive economic impact for Queensland, generating millions by engaging a supply chain of small businesses across a range of connected industries, along with supporting thousands of local cast and crew."

Lynne Benzie

President,
Village Roadshow Studios

Yes to future priority sectors.

Some of the Gold Coast's new economy is already taking shape beyond the lines of the current sector framework. Future advantage is emerging in cultural capital, music, technology and adjacent activity that is not yet fully captured in today's classifications but is already shaping how the city competes next.

Where the new economy is already emerging

Some of the Gold Coast's next economic value is already visible in areas that current classifications only partly capture. Music is one of the clearest examples, with the City of Gold Coast Music Economic Impact Assessment finding it contributed more than $845 million in GVA in 2023/24 and supported more than 3,700 local jobs despite sitting outside the current priority sector framework.

Tourism shows a related measurement gap: the priority sector framework records tourism, sport and major events at $2.9 billion in GVA, while separate Tourism Research Australia data used by Experience Gold Coast records tourism GVA at $3.1 billion in 2023/24.

Similar patterns are visible in screen and game production, where adjacent creative, digital and technical activity is recorded elsewhere in the data, and in advanced manufacturing, where higher-value activity sits alongside traditional manufacturing in a single category.

Together, these differences point to an economy broadening in ways the city should continue to notice, support and invest in. Investment in the Gold Coast Music Hall and the proposed Gold Coast Arena will help expand economic value across culture, events and the visitor economy, strengthening the city's broader economic base.

Cultural capital as economic infrastructure

Every city that has changed how the world sees it has invested in culture to do so. HOTA, backed by $130 million in City investment, has already changed how the Gold Coast is experienced and valued. The Gold Coast Music Hall now under construction and the proposed Miami Arts Depot and Gold Coast Arena will deepen that further.

Kearney's Global Cities Index, benchmarking 158 cities globally, treats cultural experience as one of 5 core dimensions of urban competitiveness. For the Gold Coast, investing in cultural capital is how a city moves beyond being known only for how it looks and starts being valued for what it can do.

The new Gold Coast economy in practice

The new Gold Coast economy moves directly to the next generation of commercial strength rather than catching up to the last. It applies technology across industries where the Gold Coast already has strength.

- Health and research capability at the Gold Coast Health and Knowledge Precinct started from bare foundations and now supports advanced clinical research, medtech and growing commercialisation
- Screen production has moved the city into one of Australia's most significant screen centres
- Arts, culture, cuisine and the city's food economy all followed the same pattern.

The focus is not to build a standalone technology sector. It is to strengthen every sector through it.

Technology is accelerating this shift

Australia emerged in 2025 as the second most favoured destination in the world for data centre investment, behind only the United States. Westpac estimates national data centre investment will exceed $155 billion over the next decade, creating the biggest increase in machinery and equipment investment in 30 years.

The same applies to autonomous systems and advanced air mobility. Deloitte Access Economics estimates medium drone uptake in Australia could boost GDP by $14.5 billion, while Morgan Stanley projects the global urban air mobility market could reach US$9 trillion by 2050.

Planning is already underway for the infrastructure and enabling conditions needed to support advanced air mobility across the city.

Artificial intelligence is lowering the barrier for startups to move from idea to product while becoming a foundational capability across every sector. Combined with the Gold Coast's entrepreneurial culture, that creates conditions for stronger growth in AI-enabled and AI-native business activity. Ensuring the city's digital infrastructure, workforce depth and regulatory environment keep pace with these shifts will be critical to capturing the value they create.

WHAT THIS MEANS

The Gold Coast's new economy is already visible across its existing strengths. Music, cultural capital and technology-enabled activity across multiple sectors show a city whose future advantage is broadening faster than current classifications can fully capture. The task now is to ensure investment, infrastructure and strategy keep pace with what the economy is already becoming.

Together, these shifts point to four clear areas of focus:

1. Keep reviewing the city's economic framework so emerging ecosystems such as music are not overlooked
2. Invest in cultural capital as part of the city's economic infrastructure
3. Embed technology and digital capability more deeply across the priority sectors
4. Position the Gold Coast more deliberately for the acceleration AI and autonomous systems are creating in how cities compete, build and grow.

Yes to trade and global markets.

The Gold Coast is converting recognition into global reach. As its export base strengthens and its international relationships deepen, the city is better placed to convert global interest into trade, investment and long-term economic partnerships.

Expanding the city's export base

The Gold Coast's export base is becoming broader, more valuable and more internationally relevant. Total exports reached $19.4 billion in 2024/25, with exports equivalent to 35% of GRP and manufacturing exports exceeding $5 billion.

While export intensity remains below larger capital cities, the trajectory is upward. International exports have grown 14% beyond pre-COVID levels, with recovery reaching 73%, the second strongest of any Australian capital city.

The composition of exports is shifting, with manufacturing (62%) and education (37%) driving the majority of international export growth, reflecting a move beyond tourism toward a more diversified export base.

Converting recognition into investment

The Gold Coast has long been recognised as a visitor destination. The next step is to convert that recognition into trade, investment, talent attraction and longer-term economic partnerships.

The type of capital the city attracts is also changing. Japan reflects long-term embedded investment across infrastructure and development, Taiwan is emerging as a repeat investor, and capital from Abu Dhabi and Singapore signals growing interest from institutional, long-term and diversified investors.

Building in-market presence

Trade and international engagement is increasingly aligned to priority sectors and markets, including the United States, Taiwan, Japan and select Gulf markets. This is supported by collaboration with Austrade, Trade and Investment Queensland and other agencies, whose in-market networks help Gold Coast businesses access priority markets more effectively.

The cost of not being in the room

Perception has a direct impact on where capital flows.

City Nation Place and Bloom Consulting research shows that city perception accounts for 37% of foreign direct investment inflows.

Research by the Committee for Sydney and Deloitte Access Economics found that Sydney's tourism-dominant identity alone was costing that city up to $3.3 billion in unrealised economic value, because it was seen as a place to visit, not a place to invest.

The Gold Coast faces a sharper version of the same challenge. With Australia's accumulated foreign direct investment stock exceeding $1.3 trillion and nearly $55 billion in new FDI attracted in 2025, the scale of the opportunity is clear.

In 2024/25, national and state trade agencies delivered strong outcomes:

Austrade:

- More than 2,000 export deals worth $7 billion
- 127 inward investment projects worth $7.2 billion nationally.

Trade and Investment Queensland (TIQ):

- 401 export outcomes worth $683 million
- 47 investment projects worth $1.87 billion across 18 international markets.

National and state agencies represent Australia and Queensland globally, but city-level advocacy still matters because capital and partnerships land in places with clear strengths, credible relationships and a compelling reason to choose them.

Turning presence into outcomes

In markets where trust and credibility drive decisions, visibility alone is not enough. In markets where major event cycles, investment decisions and strategic partnerships are shaped over many years, sustained presence and relationship-building matter as much as promotion.

Cities that show up, build relationships and advocate directly are the ones that convert interest into investment and secure a greater share of global capital.

KEY TRADE AND GLOBAL MARKET INDICATORS

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

$19B
Total exports

$5B
Manufacturing exports

62%
Manufacturing share of international export growth

37%
Education share of international export growth

14%
International export growth beyond pre-COVID levels

73%
International export recovery since COVID lows

WHAT THIS MEANS

The Gold Coast is building the partnerships and in-market presence needed to convert sector strengths into export growth, investment and long-term economic value. The opportunity is to turn global interest into measurable outcomes: stronger exports, deeper partnerships and a more sustained presence in the markets that matter most.

"The Gold Coast is emerging as a genuine launchpad for global brands. At Kent Consumer Brands, we've been able to accelerate our export business across Asia, Middle East and Africa by building strong international partnerships grounded in exceptional products manufactured in South East Queensland. We have access to great people and great ingredients in this part of the country and it shows that with the right ecosystem, you don't have to be in a capital city to think and operate globally."

Steve Adams
Managing Director,
Kent Consumer Brands APAC

Yes to visitors, events and experience.

For many, the Gold Coast begins as a place to visit, creating a pathway to deeper economic engagement. This remains one of the city's strongest economic advantages, as each visit builds recognition, connection and long-term value.

A visitor economy with global reach

The visitor economy gives the Gold Coast a level of global recognition most cities spend decades trying to build. Tourism and events are not separate from the city's broader growth story. They are part of how the city becomes better known, better understood and more investable.

The Gold Coast attracted almost 14.5 million visitors in 2025, generating around $9 billion in visitor expenditure. International visitors spent an average of $2,169 each, reinforcing the value of higher-yield segments.

Growing higher value visitation

Longer stays and higher-yield segments drive more of the value in the visitor economy. Business travel currently accounts for 10% of visitors, compared with 15% across Queensland (average of 5 years), highlighting a clear growth opportunity.

With over 680,000 international visitors and significantly higher spend per visitor (12 x domestic daytrip), international aviation access is becoming increasingly important to the city's next phase of growth. Strengthening route capacity, focusing on priority markets and targeting higher-value segments will be central to this shift.

Attracting global hospitality brands

The coastal tourism strip remains one of the Gold Coast's most valuable global assets, combining beaches, accommodation, hospitality, events and visitor experiences at scale.

That appeal is attracting global hospitality brands. Mondrian opened its first Australian property on the Gold Coast in 2025, while the proposed Ritz-Carlton signals a similar shift at the luxury end of the market. Together, they reflect a city increasingly capable of attracting brands that lift both visitor appeal and broader investment confidence.

The task now is to build on that position by lifting higher-value segments such as business events, international markets and repeat visitation.

Events that build the city's profile

Events are one of the Gold Coast's most effective ways of converting attention into economic value. The city's events portfolio is worth more than $650 million annually, with more than 900 business events attracting over 160,000 delegates each year.

Experience Gold Coast delivers a year-round calendar of signature events, including Blues on Broadbeach, Cooly Rocks On, Groundwater Country Music Festival and BLEACH*, alongside major drawcards such as the Magic Millions Carnival, AACTA Festival, Gold Coast Marathon, Pacific Airshow, Gold Coast 500 and the Pan Pacific Masters Games.

These events bring decision-makers to the city and help build relationships that lead to partnerships, investment and long-term economic activity.

Nature and culture deepening the offer

Nature and culture are becoming more deliberate parts of the Gold Coast's visitor offer, broadening visitation and deepening the city's appeal.

Nature-based tourism is a growing opportunity, with increasing demand for experiences across the hinterland, waterways and World Heritage landscapes. Investments in sustainable, low impact experiences in locations such as Springbrook, the Hinterland Great Walk and South Stradbroke Island are expanding access to these assets and positioning them as a strong complement to the coastal visitor economy.

At the same time, cultural infrastructure including HOTA, the Gold Coast Music Hall and major events are strengthening the city's cultural depth, giving visitors more reasons to stay longer and return.

This approach aligns with the Gold Coast's Destination Management Plan through to 2032.

KEY VISITOR AND EVENT INDICATORS

Unless otherwise indicated, data is for 2024/25 (1 July 2024 to 30 June 2025)

~$9B
Visitor expenditure, year ending Dec 2025

~14.5M
Total visitors, year ending Dec 2025

$2,169
International spend per visitor, year ending Dec 2025

680K
International visitors, year ending Dec 2025

900
Business events annually

160K
Business delegates

WHAT THIS MEANS

The focus now is to increase the value of each visit by attracting higher-value segments, strengthening business events and deepening international engagement. A stronger visitor economy is one that converts global recognition into sustained relationships that support investment, talent attraction and repeat visitation.

"The Gold Coast has undergone a fundamental shift in what it offers and who it attracts. The city's visitor economy is not only defined by its beaches, but also by the quality of its design, its dining, and its cultural ambition, and that is reshaping how the world's most discerning travellers think about this city"

Letitia Vitale
Managing Partner,
Vitale Property Group

Yes to support, incentives and business growth.

Opportunity on the Gold Coast moves when people can act on it quickly.

The Gold Coast offers practical support that helps businesses, investors and partners move from interest to action with greater clarity, speed and confidence.

Targeting support to high impact opportunities

Support is delivered through investment facilitation, targeted incentives and direct connections into the people, precincts and sectors shaping the city's future. This includes helping proponents navigate approvals, identify sites, connect to partners and align proposals to city priorities.

Its purpose is not only to make projects easier to navigate, but to increase the likelihood that the right opportunities land here, move faster and generate stronger long-term value for the city.

Support is most effective when it is targeted at the opportunities most likely to lift:

- new investment
- job creation
- export growth
- precinct development
- industry strength.

Public support works best when it changes an outcome: helping a project land here rather than elsewhere, move faster than it otherwise would, or proceed at a scale that delivers greater value for the Gold Coast.

Connecting investment to outcomes

Support is tailored to the scale, alignment and economic impact of each opportunity, from major investment projects to targeted sector and market development initiatives.

Since inception in February 2025, Invest Gold Coast is forecast to facilitate more than $3 billion in combined future economic benefit and more than 4,000 jobs across screen, defence, aerospace and advanced manufacturing. This includes 21 city-supported projects, comprising 16 screen productions, 4 business attraction projects and one sport attraction project.

Across screen productions alone, direct capital investment averages almost $30 million per production, contributing a combined $1 billion in economic benefit and more than 2,800 jobs during production.

Business and sport attraction activity across advanced manufacturing, modular construction, defence and aerospace has also attracted a future pipeline of more than $110 million in capital investment, $2 billion in forecast economic benefit and more than 1,100 permanent jobs.

Improving how the city is navigated

The city's advantage is not only what it offers. It is how it connects people to opportunity.

Brand activity creates global awareness and interest. Experience Gold Coast builds engagement through the visitor and experience economy. Invest Gold Coast helps businesses and investors navigate the city's opportunities more clearly, aligning projects to priorities and helping the right opportunities move faster.

Scaling support and incentives

Invest Gold Coast acts as the first point of contact for investment, expansion, relocation and priority sector opportunities, helping proponents identify the right pathway, connect the right stakeholders and move from enquiry to delivery more quickly.

Support on the Gold Coast is designed to be targeted rather than broad-based, aligned to the sectors and precincts shaping the city's future, focused on measurable economic outcomes, and structured to unlock, accelerate or scale investment.

- targeted, not broad-based
- aligned to the sectors and precincts shaping the city's future
- focused on measurable economic outcomes
- designed to unlock, accelerate or scale investment.

WHAT THIS MEANS

The priority now is to ensure that support is visible, coordinated and tightly aligned to the opportunities most likely to deliver long-term economic value. Well-targeted support will help more investment land, more projects move and more opportunities convert into measurable outcomes for the city.

"Our move to the Gold Coast has been validated by the city's growth and its ability to attract talent from across the globe. By establishing our regional office here, we've successfully tapped into a booming market, allowing us to offer the rare synergy of career growth and Australia's most sought-after lifestyle."

Kelian Buitendijk
Director,
Odoo Australia

Yes to partnerships.

The Gold Coast moves further and faster as its institutions align. Alignment across government, industry, education and investment is a real competitive advantage for the city.

Alignment is a competitive advantage

The Gold Coast's next decade will be shaped by the strength of its partnerships. No single organisation can deliver the city's full opportunity alone.

Progress depends on how effectively investment, infrastructure, talent and delivery are aligned around shared priorities. That alignment is already visible across the City Administration, Invest Gold Coast, Experience Gold Coast, Brand Gold Coast, universities, TAFE and industry partners, each bringing distinct strengths to a shared city agenda.

On the Gold Coast, alignment is reinforced by a shared city narrative that helps investors, partners and markets understand what the city stands for, where it is headed and how decisions are made.

That clarity strengthens confidence and makes it easier to move from interest to action. Combined with the city's access, speed and practical relationships, it reduces the distance between decision and delivery.

Making the city easier to navigate

Alignment reduces friction for investors, businesses and institutions by creating clearer pathways across planning, infrastructure, approvals, talent and precinct strategy.

This makes the city easier to navigate and helps opportunities move from interest to delivery with greater certainty.

Invest Gold Coast plays a central role in this, connecting partners to opportunities and aligning projects with the city's strategic direction.

Partnerships that deliver outcomes

The Gold Coast's most significant projects will be delivered through partnership, not in isolation.

These projects demonstrate how activating land, private capital, planning and delivery can come together to produce city-shaping outcomes:

- Advanced Resource Recovery Centre (ARRC)
- Shadowbox Studios
- Titans High Performance Centre
- Miami Arts Depot
- Gold Coast Arena.

These projects are complex and developed over time, requiring detailed structuring, negotiation and alignment to ensure they deliver the right long-term outcomes for the city. They are typically brought forward in stages, with full commercial, planning and community considerations assessed before final decisions are made.

The same model applies across the visitor economy, culture and talent, where coordinated effort shapes how the city is experienced, valued and invested in.

Turning alignment into long-term value

Partnership is not only a governance principle. It is a delivery model. Cities that align effectively are better positioned to:

- scale priority sectors
- coordinate infrastructure with growth
- attract and retain talent
- convert global interest into investment.

For the Gold Coast, the opportunity is to deepen that alignment further, ensuring that capital, infrastructure, decision-making and delivery are working toward the same long-term outcomes.

WHAT THIS MEANS

The Gold Coast's ability to align across government, industry, investment, education and delivery will determine how much of its opportunity becomes real outcomes. Partnership reduces friction, creates clearer pathways and helps more projects move with confidence. For investors and partners, this means a clearer pathway to partner with the City.

"It's a pleasure to offer cultural knowledge, advice and guidance on programs, like Nature-Based Tourism and Greenheart, that strengthen both our economy and benefit our broader Gold Coast community. We are on a shared journey to developing deeper, respectful relationships with business and community leaders across the Gold Coast, ensuring our Indigenous voice is not only heard but genuinely valued in shaping the future of our city.

I look forward to continuing the yarn to ensure culture, stories and respect for Country continue to be part of the conversation that guides the Gold Coast forward."

Uncle John Graham

Traditional Custodian of the Gold Coast, Kombumerri saltwater man of this place, Chairman of the Yugambeh Region Aboriginal Corporation Alliance

Yes to what comes next.

The Gold Coast's next chapter will be shaped by those ready to build it. With the platform in place, the opportunity now is to turn that momentum into long-term value.

A growth platform that's already in place

The foundations are already in place. But a platform is not a destination. What matters now is how that momentum is directed with greater intent, turning growth into productivity, profile into investment and confidence into long-term economic value.

Not every indicator is where it needs to be. Productivity has further room to improve. Housing supply and affordability remain pressing challenges. These are not side issues. They are central to what comes next.

The Gold Coast has two real advantages. The first is structural. This is a city still being built, with the ability to align infrastructure, precincts and investment around where industries are heading, rather than retrofitting the last generation of growth. The second is cultural. The city is open to new people and new ideas, and quicker than many others to turn momentum into action.

Structural: a city still being built, with the ability to align infrastructure, precincts and investment around where industries are heading, rather than retrofitting the last generation of growth

Cultural: with around 30% of residents born overseas, the Gold Coast does not treat new arrivals as outsiders. They become Gold Coasters. This openness, the lack of gatekeepers, the bias toward action and the ability to absorb new people and new ideas quickly help explain why the city can move faster, adapt earlier and turn momentum into outcomes

Driving the next phase

The next phase will depend on clearer choices, stronger alignment and continued focus on the sectors, precincts, infrastructure and partnerships most likely to position the Gold Coast as a leader in the industries shaping the future. It will also depend on how effectively the city converts momentum into better jobs, deeper economic strength, stronger investment and broader resilience.

The focus is on backing the sectors where the Gold Coast already has real foundations and where future demand is likely to be strongest.

This includes:

- advanced manufacturing
- health and wellbeing
- knowledge economy
- screen and game production
- education
- emerging fields such as space and defence, biotech and longevity, and biopharmaceutical research.

Building the next Gold Coast economy requires deliberate choices now, backing the infrastructure, skills and industries that will be critical in the years ahead.

The Brisbane 2032 Olympic and Paralympic Games will accelerate the Gold Coast's profile and investment horizon. But the city's future does not begin there, and it does not depend on it.

The next 6 years will strengthen the city's long-term economic platform:

- infrastructure investment
- stronger sectors
- deeper skills
- clearer global positioning
- more durable investment attraction.

The real legacy will not be measured only in events, venues or visibility. It will be in what the Gold Coast becomes along the way: a stronger city, with better infrastructure, deeper cultural capital, greater investment appeal and stronger global reach.

Investment that will shape outcomes

For investors, it means backing the precincts, projects and businesses with room to grow.

For government, it means backing the infrastructure, planning and enabling conditions that help growth translate into long-term capacity and confidence.

For business and institutions, it means investing in the people, skills and partnerships that will help the Gold Coast scale what it already does well.

Invest Gold Coast's Trade and Investment Strategy 2026–2031 sets clear objectives:

- attract $1.3 billion in investment
- generate $3.6 billion in economic activity
- create 15,000 jobs
- establish 5 major catalytic projects.

The Gold Coast's geographic and time zone advantage across the Asia-Pacific makes it a genuinely viable business base for regional operations, including for markets such as Japan that are only a one-flight, one-sleep journey away.

The city also has something most trade strategies lack: people. High-profile Gold Coasters who have built international credibility in:

- business
- sport
- screen
- health
- innovation.

These individuals are natural ambassadors. Their credibility is earned, not manufactured.

None of this has happened by accident. It reflects years of deliberate leadership from the City Administration, the institutions that have backed its direction, and the political leadership that has shaped the conditions for growth and held the course when it mattered most.

A city moving from momentum to intent

Long before the Gold Coast became a city, this was a place shaped and cared for by its Traditional Owners. Their connection to land, water and community remains part of the city's story today.

We are a city where people come to build. A city where ambition is met with openness, where access is valued over hierarchy, and where the distance between an idea and a decision is often shorter than elsewhere. That is not only a cultural quality. It is one of the Gold Coast's greatest economic advantages.

This is a city where the CEO surfs at 5am and is at her desk by 7am. Where the meeting starts in a boardroom and finishes at a café. Where people ask what you are building, not where you went to school. Where ambition is high and pretension is low. Where the work gets done, in shorts and thongs if we feel like it. That is not a lifestyle pitch. It is why the Gold Coast moves faster.

Open. Ambitious. Unpretentious. Connected. Practical. Fast moving. Future focused.

This city does not need to become another place. Its opportunity is to become a more confident version of itself.

We are building the new Gold Coast economy. Stronger industries. Deeper global connections. Better infrastructure. More opportunity for more people, and we are not waiting for permission to do it.

An invitation to those ready to build

We are looking for the people, businesses, institutions and investors who want to help build it. The platform is ready. What comes next depends on who chooses to build with us.

This means:

- backing priority sectors
- aligning infrastructure with growth
- strengthening global connections
- converting interest into investment.

If you can see what this city is becoming and want to be part of it, we want you here. Bring your ideas. Bring your capital. Bring your ambition. The invitation is open.

"They told me I could not be an architect. I asked, 'Can I design for myself?' And they said yes, as long as you never call yourself an architect. This changed everything for me. These turned out to be the biggest glad tidings. If my qualifications had been accepted in Queensland, I would have found a job. Instead, with money I had saved while working in university, and help from my family, I bought a block of land: number 27 Cabana Boulevard, and I built my first house. The biggest real estate developer at the time, Max Christmas, looked at what we had built. He said, 'That's not a house. That is an office building.' I told him brick veneer didn't fit with the climate. He said Victorians buy these houses and they like brick veneer. I told him I would do it my way."

Soheil Abedian

Executive Chairman and Founder of Abedian & Co., Patron of Abedian School of Architecture at Bond University, Founder of Sunland Group, Chairman of Abedian Foundation, Council Member to Global Peace & Prosperity Forum

A City That Says Yes.

Yes to

Opportunity
Investment
Enterprise
Talent
Projects that shape the city
Global markets
Visitors, events & experience
Partnerships &
what comes next.

Appendix A: Gold Coast Growth Precincts

Advanced Resource Recovery Centre (ARRC)

The Advanced Resource Recovery Centre is one of the Gold Coast's most significant emerging industrial precincts, anchored by circular economy, recycling and clean energy activity in Yatala–Stapylton. Spanning more than 70 hectares of Cityouncil-owned land, it is designed to support long-term industry growth, innovation and new business activity in resource recovery and related sectors. As the precinct develops, it will bring together major infrastructure, private investment and circular economy businesses in one location, helping position the Gold Coast as a leader in resource recovery and industrial transition.

Coomera Central

Located within the high-growth corridor between Brisbane and the Gold Coast, Coomera Central offers a broad mix of investment opportunities. Its location, population growth and transport connectivity make it an increasingly important centre for residential, commercial and mixed-use development.

Coastal Tourism Strip

Home to some of Australia's most recognisable beaches, the Coastal Tourism Strip is central to the Gold Coast's domestic and global visitor brand. It remains one of the city's most important concentrations of tourism, hospitality, accommodation, events and experience-based economic activity.

Gold Coast Airport

As the city's global gateway, Gold Coast Airport plays a central role in connecting the region to domestic and international markets. It is a major economic anchor for both the Gold Coast and Northern New South Wales, supporting tourism, trade, business activity and long-term regional growth.

Gold Coast Cultural Precinct (HOTA)

Home of the Arts is one of the Gold Coast's most significant cultural assets and an important part of the city's broader civic and visitor offer. Backed by around $130 million in City investment, the precinct continues to evolve through long-term master planning and growing cultural depth.

Gold Coast CBD, Southport

Located in Southport, the Gold Coast CBD has long played a central role in the city's civic and administrative functions and remains the traditional heart of business activity. As a priority urban centre, it continues to support the city's commercial, institutional and investment growth.

Gold Coast Health and Knowledge Precinct

The Gold Coast Health and Knowledge Precinct is one of Asia-Pacific's leading innovation ecosystems, bringing together more than $5 billion in health, research and education infrastructure across 200 hectares in Southport. It supports more than 1,000 researchers and 16,000 workers, alongside a thriving community of clinicians, entrepreneurs, students and global industry partners. The precinct includes major hospitals, universities, research institutes, the Institute for Biomedicine and Glycomics, and the COHORT innovation hub within the Lumina commercial cluster.

More than $800 million in private development has recently been completed or is underway, supporting biomedical innovations, specialist clinical capabilities and stronger links between care, education and commercialisation. The precinct's role is to deepen those connections further, so increased value is created locally across the full health ecosystem. Increasingly, that includes the city's emerging strengths in human performance, prevention and applied health innovations, extending the sector's role beyond health service delivery into improved quality of life and economic outcomes.

Marine Precinct at Coomera

Situated on the Coomera River, the 250-hectare Gold Coast Marine Precinct at Coomera is one of Australia's leading marine industry hubs. It supports manufacturing, maintenance, refit, berthing, chandlery, repair and specialist professional services for the marine sector and vessel owners from around the world.

Northern Marine Precinct Steiglitz

The Northern Marine Precinct master plan aims to activate a new marine industry location that has the required characteristics to support and accommodate the future expansion of the marine industry within the city.

Robina Central

Robina Central is one of the Gold Coast's most important economic and social centres, with a strong focus on employment, lifestyle and community infrastructure. The precinct has benefited from major investment, including the Gold Coast rail network, Robina Hospital and Robina Stadium, with future projects such as Greenheart continuing to strengthen its role.

Yatala–Stapylton

One of the Gold Coast's most significant industrial growth areas, Yatala–Stapylton spans around 800 hectares of industry-zoned land. Its proximity to major industrial precincts, large regional populations and key freight and transport infrastructure makes it a strategically important location for logistics, manufacturing and future employment growth.

Appendix B: Gold Coast City Shaping Projects

Advanced Resource Recovery Centre (ARRC)

A $1.6 billion integrated recycling, energy and circular economy project on over 70 hectares of City-owned land in Yatala–Stapylton. Delivered in stages through to 2032, the ARRC will divert up to 97 per cent of the city's waste from landfill, generate enough energy to power up to 80,000 homes, produce green hydrogen and support new circular economy businesses. Stage one, a $90 million organics processing facility, is already operational. It is one of the most ambitious integrated resource recovery projects undertaken by any local government in Australia.

Surfers Paradise Revitalisation

The Surfers Paradise Revitalisation project reflects the same logic at precinct scale, repositioning the city's best known visitor area as a stronger destination for events, dining, entertainment and public life. The $100 million project with a focus on Cavill Avenue, Cavill Mall and The Esplanade, is designed to create a more pedestrian-friendly, family-oriented and experience-rich precinct that can support greater visitation, dwell time and economic activity.

Gold Coast Music Hall

The Gold Coast Music Hall is a $40 million arts and culture project that will repurpose the Surfers Paradise Transit Centre into a flexible live music, events and cultural venue in the heart of Surfers Paradise. Expected to open by 2028, the venue will support national and international touring artists, strengthen the city's cultural profile, and deliver economic benefits through jobs, visitor activity and greater precinct activation around Beach Road, Cavill Avenue and Cavill Park.

Titans High Performance Centre

The Titans High Performance Centre responds to a clear community need for accessible, purpose-built sport and wellbeing infrastructure that can support both elite pathways and broad-based participation. More than an administration and training facility, it is designed as a community hub that can strengthen inclusion, reduce barriers to participation and improve physical activity, social connection and mental wellbeing across the Gold Coast.

Shadowbox Studios, Yatala

Shadowbox Studios has been selected as the developer for a major new screen production facility at Yatala, reinforcing the Gold Coast's position as one of Australia's leading screen industry locations. Proposed across a 22-hectare City-owned site, the project includes up to 10 sound stages, workshops, office space, backlot and training facilities, with Phase 1 targeted for operation by 2029

Gold Coast Arena

Gold Coast Arena is a proposed live entertainment and sports venue at Carey Park, Southport, intended to fill one of the city's most significant missing pieces of event infrastructure. With support from the City, Invest Gold Coast is managing the transaction process. The project is designed to host premium live music, sport, comedy, esports and potential Brisbane 2032 Olympic and Paralympic Games events, while strengthening the Southport, attracting investment, supporting local business and expanding the city's capacity to compete for higher value major events over the long term.

Miami Arts Depot

Miami Arts Depot is a rare urban renewal and investment opportunity that will transform a former City depot site into a mixed-use creative industries precinct connected to the Gold Coast Light Rail. Positioned in the heart of Miami, the 40,000 square metre site is intended to support screen pre and post production, digital industries, arts, culture, housing, public space and lifestyle uses while strengthening the Gold Coast's growing creative economy and global screen profile.

HOTA, Home of the Arts, Masterplan

Since 2013, the HOTA precinct has transformed the Gold Coast's 16.9-hectare cultural precinct into one of the city's most significant civic and cultural assets. With major investment already delivered, including the outdoor stage, concert lawn, Green Bridge and HOTA Gallery and future stages such as the proposed lyric theatre under consideration, the project continues to strengthen the city's cultural capacity, visitor appeal and long-term economic value.

Nerang Administration Precinct Redevelopment

The Nerang Administration Precinct is a strategically located site near the Nerang CBD and Pacific Motorway, with potential to evolve into the proposed Hinterland Gateway Community Hub. Council has endorsed the transaction of the site in partnership with the private sector to help deliver a modern, multi-purpose community facility that supports recreation, arts, wellbeing and stronger local connection, along with diverse housing outcomes.

Southport (City Centre Redevelopment)

Southport has long played a central role in the city's history. The City Centre Redevelopment remains a priority infrastructure project and is central to strengthening Southport's role as a business, investment and commercial centre.

Appendix C: What sits within each priority sector

The priority sectors used in this report are built from grouped industry classifications aligned to the Gold Coast economy. They reflect where investment, growth and commercial strength are emerging across the city and are intended to provide a practical view of the industries shaping the new economy.

Priority Sector	Includes industries such as
The knowledge economy	Professional services, finance and insurance, computer system design and related services, administrative services, digital services, research, publishing and information services, and other knowledge-intensive business activities.
Health and wellbeing	Hospitals, medical and other health care services, residential care services, social assistance services, allied health, health research, medtech and related wellbeing services.
Building future industries	Advanced manufacturing, marine manufacturing and services, transport and equipment manufacturing, machinery manufacturing, fabricated metal products, chemicals, polymers, utilities related production and other future-focused industrial activity.
Tourism, sport and major events	Accommodation, food and beverage services, visitor transport, arts and recreation, sports and recreation activities, cultural and heritage activities, and other industries that support the visitor economy and major events.
Education and future skills	Preschool and school education, tertiary education, adult, community and other education, training services, international education and the broader skills pipeline supporting future workforce capability.
Screen and game production	Motion picture and sound recording activities, broadcasting, publishing, digital content production, creative technology, games-related activity and the wider screen production ecosystem.

Disclaimer and data assurance

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Appendix E: Glossary

AI-enabled

Businesses or activities in any sector that use artificial intelligence tools to improve what they already do, such as optimising operations, accelerating research or enhancing products and services.

AI-native

Businesses built from the ground up with artificial intelligence as a core part of how they operate, where AI is not an add-on but the foundation of the product, service or business model.

Brand value

The estimated economic value of a city's brand and reputation, including how it influences tourism, investment and migration decisions.

Catalytic project

A project that triggers broader economic, social or investment benefits beyond its direct footprint.

Commercialisation

The process of turning research, ideas or innovation into market-ready products, services or businesses.

Cultural capital

The value created by a city's arts, culture, heritage and creative life in shaping identity, attractiveness and economic competitiveness.

Economic base

The mix of industries, businesses and productive activity that underpins a city's economy.

Economic complexity

A measure of the diversity and sophistication of an economy, based on the range and mix of industries that contribute to output. More complex economies tend to have stronger adaptability, resilience and long-term growth potential.

Economic resilience

The ability of an economy to adapt to shocks, absorb disruption and continue growing over time.

Economic weight

The scale, strength and strategic significance of an economy, including its capacity to generate output, attract investment and influence wider markets.

Export base

The range and value of goods and services a city or region sells to national and international markets.

Export intensity

A measure of export performance relative to the size of the workforce or economy, often shown as exports per worker.

Foreign direct investment (FDI)

Investment from overseas into local businesses, projects, assets or operations.

Full-time equivalent (FTE)

A standard measure of employment that converts full-time and part-time work into comparable full-time units.

Gross Regional Product (GRP)

The total value of goods and services produced within a region. It is the regional equivalent of Gross Domestic Product (GDP).

Gross value added (GVA)

The contribution of individual industries or sectors to the economy, measured before taxes and subsidies.

Internal migration

Movement of people within Australia from one region to another.

Knowledge economy

Economic activity based on professional expertise, research, digital capability, information, technology and other knowledge-intensive services.

Labour force

All people who are either employed or actively seeking work.

Labour force participation rate

The share of the population that is employed or actively seeking work.

Net exports

The difference between the value of exports and the value of imports.

Net migration

The difference between the number of people moving into an area and the number moving out.

Post, digital and visual effects (PDV)

A category of screen production activity covering post-production, digital work and visual effects. In Queensland, PDV incentives apply to eligible screen projects that undertake qualifying PDV work in the state, supporting local skills, employment and business activity.

Precinct

A defined area where related economic, civic, cultural or industry activity is concentrated.

Prime office

Higher-quality office space in preferred commercial locations, typically with stronger tenant demand and higher rents.

Priority sectors

The industries identified as most important to the Gold Coast's current and future economic growth, investment attraction and capability-building.

Productivity

A measure of how efficiently an economy generates output, often expressed as GRP per worker or per FTE job.

Prosperity

A measure of economic output per person, typically shown as GRP per capita.

Public realm

The shared public spaces of a city, including streets, parks, plazas, waterfronts and civic areas.

Secondary office

Older, lower-grade or less centrally located office space, typically with lower rents and different market demand.

Self-containment

The proportion of people who both live and work in the same area.

The new Gold Coast economy

The next chapter of a city that has always backed big ideas, from the pioneers who built industries in marine, medical research, screen and tourism, to the entrepreneurs who saw opportunity where others saw risk. The new Gold Coast economy connects that same drive to deeper capability, stronger infrastructure, emerging technology and the industries where the city's foundations are strongest. It is not a smart city agenda of sensors and optimisation. It is a deliberate economic strategy built on the Gold Coast's ability to grow new strengths faster than most expect.

Total employment (jobs)

The total number of jobs in the economy, including both full-time and part-time roles.

Trade-exposed industries

Industries that compete in national or international markets and are influenced by external demand, pricing and competitiveness.

Unemployed

People who are not working but are actively seeking work and available to start.

Unemployment rate

The share of the labour force that is unemployed.

Visitor economy

The industries and activities supported by visitors to a city, including tourism, events, accommodation, hospitality, transport and related services.

Visitor nights

The total number of nights spent in a region by visitors.

Yield

The return generated from an asset or activity. In visitor economy contexts, it can also refer to the value generated per visitor.

State of the City Report 2026