

Market Snapshot

Year ended December 2008



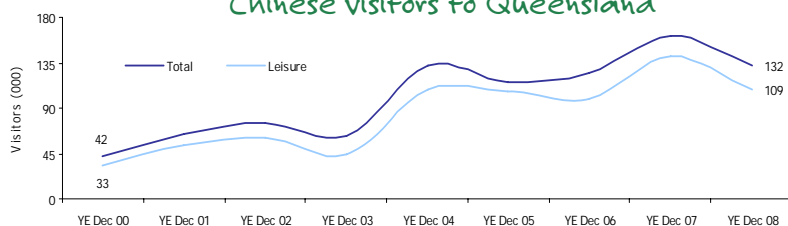
China

	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec 08	Share of visitors to Qld
Total visitors	336,000	-1% ▼	7%	132,000	-18% ▼	6%
Total ALOS ¹ (nights)	47.8	3.9 ▲		14.3	5.9 ▲	
Leisure² visitors	229,000	-3% ▼	6%	109,000	-23% ▼	6%
Leisure ALOS	18.5	-0.9 ▼		5.7	-0.1 ▼	
Expenditure (\$m)³	1,584	12% ▲	9% (share of expenditure)	213	28% ▲	5% (share of expenditure)

Chinese visitors to Australia



Chinese visitors to Queensland



Chinese visitors to Australia

After the SARS dip in 2003, Chinese numbers to Australia have continued to grow, yet the December quarter has begun to see the effects of the global economic crisis with numbers dropping slightly.

First time visitors to Australia accounted for 47% of the Chinese market, this market declined by 19% over the year to December 2008. Repeat visitors however have increased (up 24%) over the same period.

Half of Chinese visitors travel alone (slightly lower than the average total international market of 55%).

Business associates travelling together or with spouses accounted for 14% of the Chinese market, higher than the total international market (4%).

Chinese visitors to Queensland

First time visitors (to Australia) accounted for 65% of the Chinese market to Queensland. This market has decreased by 30% over the year to December 2008.

The Gold Coast and Brisbane were the State's most visited regions for Chinese visitors. 69% of Chinese visitors to Queensland went to the Gold Coast, while 33% had a stop over in Brisbane. Chinese to the Gold Coast declined by 19% over the last year, while Chinese visitors to Brisbane declined by 33%.

Chinese visitors spent \$213 million in Queensland in the year to December 2008. This was an increase of 28% on the same period last year.

Chinese spend per visitor in Queensland was \$1,612, lower than the total international average spend (\$1,975).

Main purpose of visitation to Australia

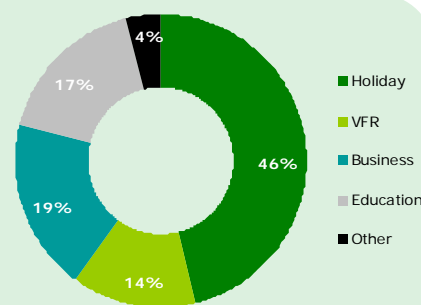
The holiday market accounted for just under half of all Chinese visitors to Australia. This market declined by 1% over the year to December 2008.

Chinese holiday visitor nights also declined (down 27% over the year to December 2008). Their average length of stay was 9.6 nights.

The business market declined by 9% over the year to December 2008, business visitor nights also declined over the same period (down 11%).

Chinese education visitors average length of stay was 177.2 nights and this influenced the overall Chinese visitor length of stay.

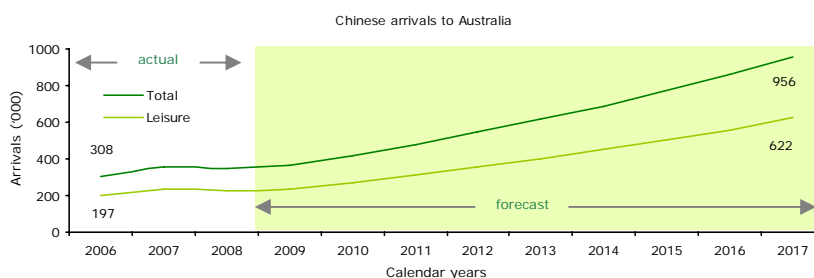
Education visitors from China accounted for a larger proportion of the market than most other markets and also the total international market average (which is 7%).



Chinese arrivals forecast⁴

As China becomes an increasingly important source market for Australia, economic, cultural and aviation links continue to strengthen with other countries, meaning more potential as a rival destination.

Arrivals to Australia from China are forecast to increase by an average of 12% each year from 2012 to reach 956,000 arrivals in 2017.



1. Average length of stay
 2. Leisure is holiday and visiting friends or relatives (VFR) combined
 3. Expenditure data is sourced from Tourism Research Australia and is inclusive of package expenditure
 4. Tourism Forecasting Committee 2008 Issue 2

Note All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2008