

Market Snapshot

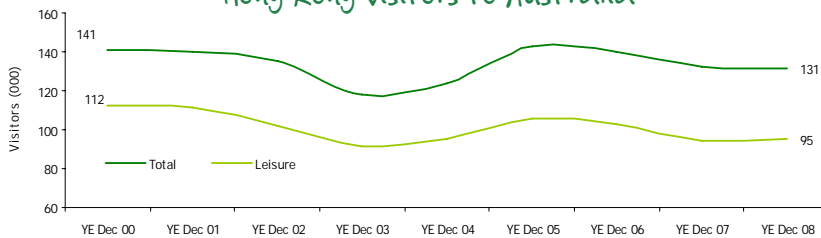
Year ended December 2008



Hong Kong

	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	131,000	-1% ▼	3%	39,000	-11% ▼	2%
Total ALOS ¹ (nights)	33.1	1.1 ▲		28.6	7.6 ▲	
Leisure² visitors	95,000	1% ▲	2%	31,000	-11% ▼	2%
Leisure ALOS	16.3	0.3 ▲		9.5	1.0 ▲	
Expenditure (\$m)³	519	14% ▲	3% (share of expenditure)	136	32% ▲	3% (share of expenditure)

Hong Kong visitors to Australia



Hong Kong visitors to Australia

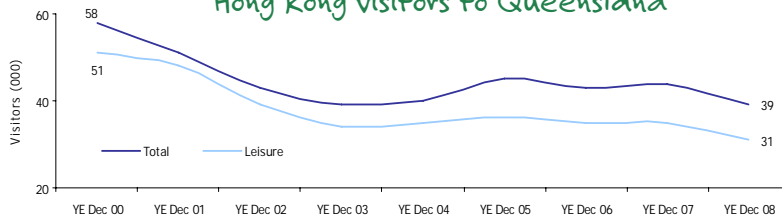
After the SARS dip in 2003, visitors from Hong Kong to Australia increased but then began to decline again from 2005.

First time visitors to Australia accounted for 32% of the Hong Kong market, this market declined by 7% over the year to December 2008.

Repeat visitors however saw an increase (up 2%) over the same period.

62% of visitors from Hong Kong travel alone (higher than the average total international market of 55%).

Hong Kong visitors to Queensland



Hong Kong visitors to Queensland

First time visitors (to Australia) accounted for 49% of the Hong Kong market to Queensland. This market has declined by 10% over the year to December 2008.

The Brisbane and the Gold Coast were the State's most visited regions for Hong Kong visitors. 55% of visitors from Hong Kong to Queensland went to Brisbane, while 42% had a stop over at the Gold Coast. The Hong Kong market to Brisbane declined by 9% over the year to December 2008, while visitors to the Gold Coast increased by 8% over the same period.

Visitors from Hong Kong spent \$136 million in Queensland in the year to December 2008. This was an increase of 32% on the same period last year.

The Hong Kong market spend per visitor in Queensland was \$3,497, higher than the total international average spend (\$1,975).

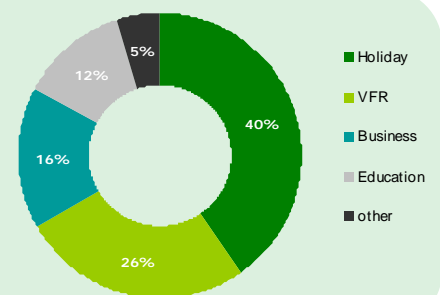
Main purpose of visitation to Australia

The holiday market accounted for two in five visitors from Hong Kong to Australia. This market declined by 3% over the year to December 2008.

Hong Kong holiday visitor nights however, increased by 11% over the year to December 2008. Their average length of stay was 19.2 nights.

The business market declined by 4% over the year to December 2008, business visitor nights remained stable over the same period.

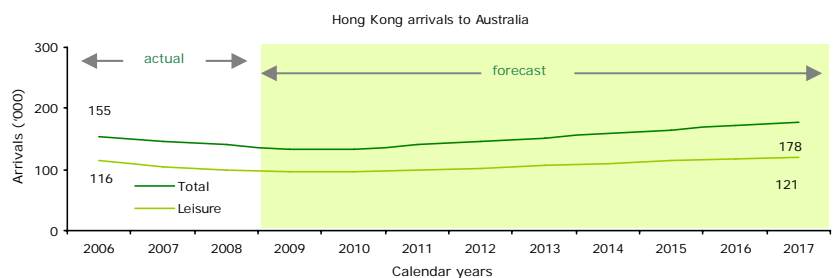
Education visitors increased by 2% and visitor nights increased by 3% over the year to December 2008. This market's average length of stay was 153.1 nights and this influenced the overall Hong Kong visitor length of stay.



Hong Kong arrivals forecast ⁴

Hong Kong is a highly competitive market, which is influenced heavily by airline pricing strategies aimed at pushing sales for onward booking. New routes and services by Cathay Pacific have increased price competition for Australia.

Arrivals to Australia from Hong Kong are forecast to increase by an average of 4% each year from 2012 to reach 178,000 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