

Market Snapshot

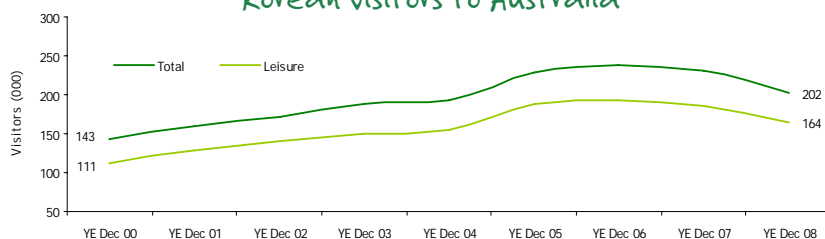
Year ended December 2008



Korea

	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec08	Share of visitors to Qld
Total visitors	202,000	-13% ▼	4%	70,000	-8% ▼	3%
Total ALOS ¹ (nights)	51.8	5.1 ▲		37.3	3.0 ▲	
Leisure² visitors	164,000	-11% ▼	4%	63,000	0%	4%
Leisure ALOS	32.9	2.5 ▲		23.3	1.2 ▲	
Expenditure (\$m)³	941	1% ▲	6% (Share of expenditure)	193	-2% ▼	5% (Share of expenditure)

Korean visitors to Australia



Korean visitors to Australia

After gradual growth from 2000 the Korean market has been declining over the December 2006 to December 2008 period.

First time visitors to Australia accounted for 66% of the Korean market, this market declined by 20% over the year to December 2008. Repeat visitors saw an increase (up 4%) over the same period.

Half (50%) of Korean visitors travel alone slightly lower than the average total international market of 55%.

14% of Korean visitors to Australia were backpackers⁴ this market declined by 13% over the year to December 2008.

Korean visitors to Queensland



Korean visitors to Queensland

First time visitors (to Australia) accounted for 71% of the Korean market to Queensland. This market has declined by 20% over the year to December 2008.

The Gold Coast and Brisbane were the State's most visited regions for Korean visitors. 56% of Korean visitors to Queensland went to the Gold Coast, while 47% had a stop over in Brisbane. Korean visitors to the Gold Coast and Brisbane declined by 8% and 14% respectively over the last year.

Koreans spent \$193 million in Queensland in the year to December 2008. This was a decline of 2% on the same period last year.

Korean spend per visitor in Queensland was \$2,758, higher than the total international average spend (\$1,975).

Main purpose of visitation to Australia

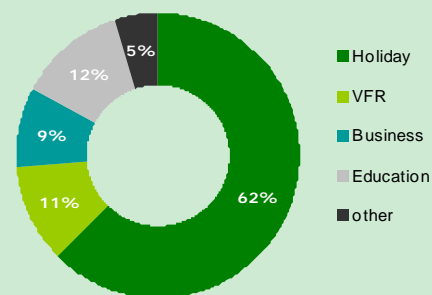
The holiday market accounted for three in five Korean visitors to Australia. This market declined by 17% over the year to December 2008.

Korean holiday visitor nights also declined (down 12%) over the year to December 2008. Their average length of stay was 33.8 nights.

The visiting friends or relatives (VFR) market saw a decline of 3% over the same period and VFR visitor nights also declined (down 14%).

The business market increased by 7% over the year to December 2008, business visitor nights also increased over the same period.

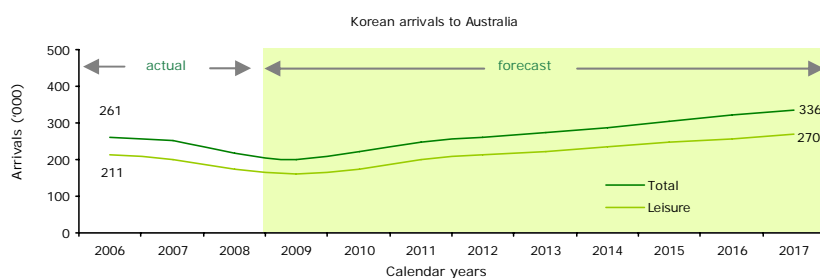
Korean education visitors declined as did education visitor nights over the year to December 2008. This market's average length of stay was 182.8 nights and this influenced the overall Korean visitor length of stay (51.8 nights).



Korean arrivals forecast ⁵

The Korean government 'open sky' policy with countries like China, Vietnam and Japan is expected to increase competition to Australia, however a new air services agreement (August 2007) boosted seats per week into Australia resulting in strong outbound growth.

Arrivals to Australia from Korea are forecast to increase by an average of 5% each year from 2012 to reach 336,000 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. Backpackers are classified as visitors who spent at least one night in a backpacker or hostel
5. Tourism Forecasting Committee 2008 Issue 2

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