

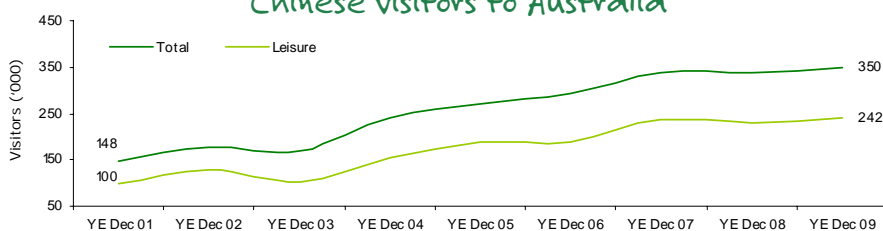
Market Snapshot

Year ended December 2009

China

	Australia	Change Dec 08 to Dec 09	Share of international visitors	Queensland	Change Dec 08 to Dec 09	Share of visitors to Qld
Total visitors	350,000	4% ▲	7%	153,000	16% ▲	8%
Total ALOS ¹ (nights)	54.7	6.9 ▲		12.1	-2.3 ▼	
Leisure² visitors	242,000	6% ▲	6%	133,000	22% ▲	8%
Leisure ALOS	21.3	2.8 ▲		5.6	-0.1 ▼	
Expenditure (\$m)³	2,023	28% ▲	12% (share of expenditure)	287	35% ▲	7% (share of expenditure)

Chinese visitors to Australia



Chinese visitors to Australia

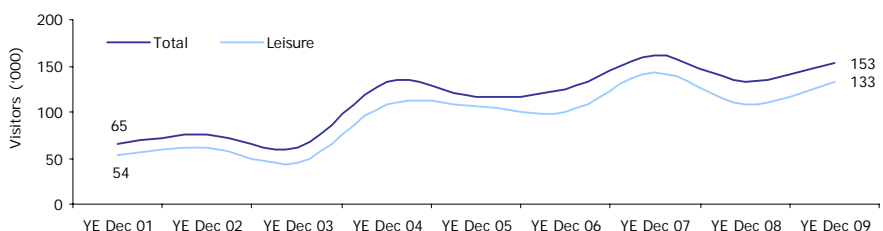
Since the year ended December 2001, the number of Chinese visitors to Australia has increased. In the year ended December 2009, Chinese visitors to Australia increased, with the VFR (visiting friends or relatives) market increase a key contributor.

Half of Chinese visitors to Australia were repeat visitors (51%), they reduced their visitation by 1% over the last 12 months. Conversely first time visitors increased.

Almost half of Chinese visitors travelled unaccompanied (46%), while 18% travelled as an adult couple in Australia.

In general, visitors from China had a longer stay compared with the average international visitor (54.7 nights compared to 34.4 nights).

Chinese visitors to Queensland



Chinese visitors to Queensland

Chinese visitor numbers to Queensland increased in the year ended December 2009 (up 16%). Much of the growth in visitation came from an increase in holiday visitors.

The Gold Coast and Brisbane were the Queensland regions most visited for Chinese visitors (67% and 41% made a stopover respectively). Chinese visitors to Brisbane and the Gold Coast increased over the year to December 2009 (up 47% and 12%, respectively).

Chinese visitors spent \$287 million on their trips to Queensland in the year to December 2009. This was an increase of 35% on the previous year.

Chinese spend per visitor in Queensland was \$1,877. This is lower than the average spend of all international visitors to Queensland (\$1,973).

Main purpose of visitation to Australia

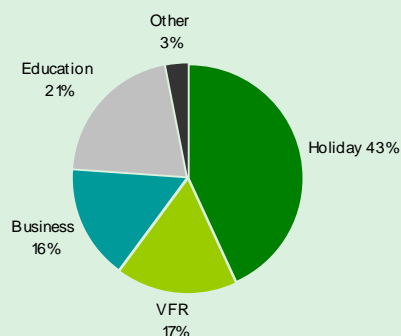
The holiday market accounted for 43% of all Chinese visitors to Australia. This market declined by 3% over the year to December 2009.

The business market also declined by 20% over this period.

However, the VFR (visiting friends or relatives) market increased by 26%.

Chinese education visitors average length of stay was 170.7 nights and this influenced the overall Chinese visitor length of stay.

Education visitors from China accounted for a larger proportion of the market than the average international market (21% compared with 8%).

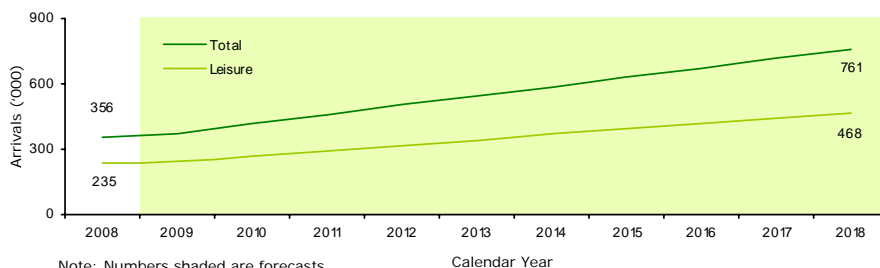


Chinese arrivals forecast ⁴

Chinese arrivals to Australia are forecast to increase by an average of 8% each year from 2008 to reach 761,000 arrivals in 2018.

Please note that arrivals forecast are based on total visitor arrivals into Australia, and therefore may vary from the visitation figures provided in the table above (as visitors are defined as persons over the age of 15, who are visiting Australia for 12 months or less).

Chinese arrivals to Australia



Note: Numbers shaded are forecasts.

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 2009 Issue 2

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2009