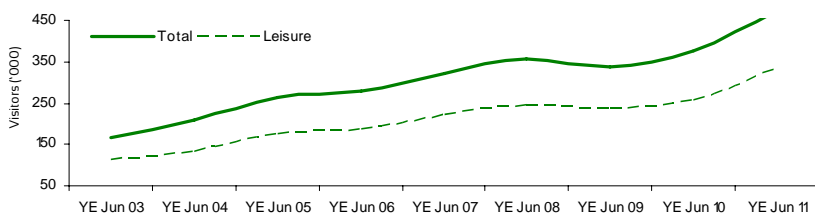


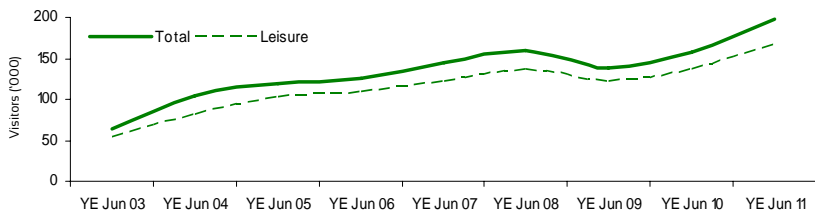
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	473,000	▲ 26%	9%	198,000	▲ 25%	10%
Total ALOS ¹ (nights)	53.2	▼ -6.5		17.8	▲ 1.6	
Leisure² visitors	335,000	▲ 31%	8%	166,000	▲ 21%	10%
Leisure ALOS	22.2	▼ -1.6		8.2	▲ 0.8	
Expenditure (\$m)³	\$2,674	▲ 18%	15% (share of expenditure)	\$381	▲ 14%	11% (share of expenditure)

Chinese visitors to Australia



Chinese visitors to Queensland



Chinese visitors to Australia

Improving living standards in China is driving outbound travel. China remains one of Australia's fastest growing international markets and increased by 26% in the year ending June 2011. This growth was driven by holiday and business travel.

Almost 53% of Chinese visitors to Australia are on a return visit. Repeat visitors grew strongly in the year ending June 2011, up 30% or 57,000 visitors. First time visitors also increased, but to a lesser extent (up 21% or 39,000 visitors).

While 46% of Chinese visitors to Australia travel unaccompanied, 37% are on a group tour, which compares to just 8% of all international visitors to Australia who travel on a group tour.

Chinese visitors to Queensland

Chinese visitation to Queensland increased by 25% in the year ended June 2011, driven by first time visitors coming for a holiday. Over 77% of Chinese visitors to Queensland are on a holiday (compared with 56% of Chinese visitors to Australia).

Chinese visitors are most likely to visit the Gold Coast, Brisbane and Tropical North Queensland when in Queensland. Their visitation to these regions increased 10%, 28% and 37% respectively for the year.

China Market Insights⁴

Australia's share of China's outbound travel has decreased from 1.1% in 2000 to 0.8% in 2010. This is the result of increased competition in the China market, particularly from the United States, Canada and the Western European countries. Regardless, visitation from China has increased driven by expanding aviation capacity and an inflated Chinese Yuan offsetting the strong Australian dollar.

Expenditure in Queensland

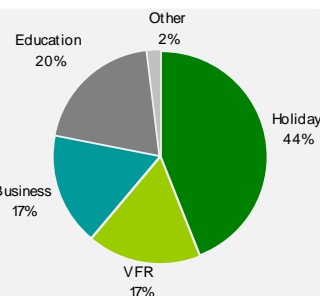
Chinese visitors spent \$381 million on their trips to Queensland in the year ending June 2011. This was an increase of 14% on the previous year.

Chinese spend \$1,927 per visitor and \$108 per night on their trips to Queensland. This is higher than the average spend of all international visitors to Queensland (\$1,822 per visitor or \$91 per night).

Main purpose of visitation to Australia

The Chinese holiday market increased 36% in the year ending June 2011. Business and VFR travel also increased, up 29% and 20%, respectively.

Education visitors accounts for 20% of the Chinese market compared to just 8% of all international visitors to Australia. The previous growth in the Chinese education market has slowed.

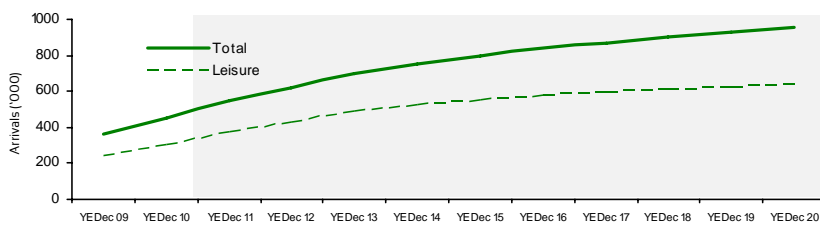


Chinese arrivals forecast⁵

Chinese arrivals to Australia are forecast to increase by an average of 7.8% per year between 2010 and 2020 to reach 958,000 arrivals.

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).

Forecast 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 Australia's China Market Profile 2011
5. Tourism Forecasting Committee 2011 Issue 2
Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2011

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