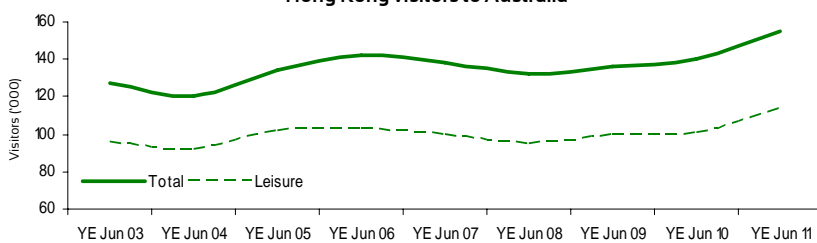


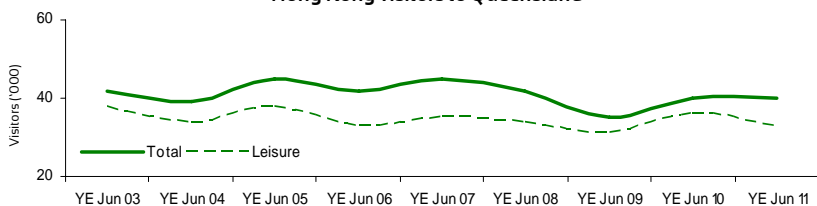
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	155,000	▲ 11%	3%	40,000	● 0%	2%
Total ALOS ¹ (nights)	32.1	▼ -5.2		16.3	▼ -4.0	
Leisure² visitors	113,000	▲ 12%	3%	33,000	▼ -8%	2%
Leisure ALOS	17.9	▼ -3.7		12.2	▼ -2.7	
Expenditure (\$m)³	\$612	▲ 9%	3% (share of expenditure)	\$72	▼ -17%	2% (share of expenditure)

Hong Kong visitors to Australia



Hong Kong visitors to Queensland



Hong Kong visitors to Australia

Visitors from Hong Kong to Australia increased over the year ended June 2011, with improved consumer confidence in Hong Kong driving the growth.

Hong Kong visitors are increasingly travelling free and independently to Australia, with strong growth in non-group tours (12%) and non-package tour visitors (10%). Further, over half of all Hong Kong visitors travelled unaccompanied (63%).

This increasing independence may be associated with the fact that the majority of visitors from Hong Kong in the year ending June 2011 were repeat visitors (70%). Repeat visitation has increased by 9% or 9,000 visitors over the year.

Hong Kong visitors to Queensland

Hong Kong visitation to Queensland was stable in the year ending June 2011. This was driven by an increase in the VFR (visiting friends or relatives) market (up 10%).

Brisbane, the Gold Coast and Tropical North Queensland were the most visited Queensland regions by Hong Kong visitors. While the Gold Coast had growth (up 19%), Brisbane had declines (down 9%) from Hong Kong visitors.

Hong Kong Market Insights⁴

Australia's share of Hong Kong's outbound market has remained steady from 2000 to 2010 at 0.2%. The Hong Kong market has been affected by a strong Australian dollar reducing affordability of travel to Australia. Moreover, increasing travel from China and Europe to Australia via Hong Kong has reduced seat availability for Hong Kong residents. Air capacity is being expanded on the Hong Kong-Australia route.

Expenditure in Queensland

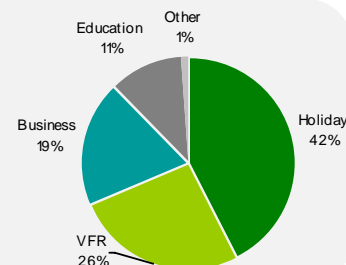
Visitors from Hong Kong spent \$72 million on their trips to Queensland in the year ending June 2011. This was a decrease of 17% on the previous year.

Hong Kong visitors spent an average of \$1,780 on their trips and \$109 per night in Queensland. This was lower than the average spend of all international visitors to Queensland (\$1,822 per visitor or \$91 per night).

Main purpose of visitation to Australia

Hong Kong visitors are less likely to come to Australia for a holiday, but more likely to visit for business, education and VFR than the average international visitor.

The increase in Hong Kong visitors to Australia was driven by an increase in holiday visitors (up 12%). Education visitors from Hong Kong declined.

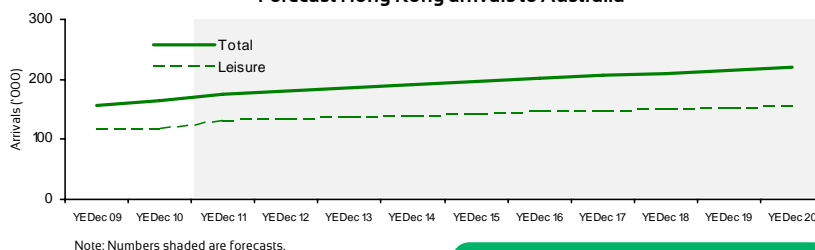


Hong Kong arrivals forecast⁵

Arrivals to Australia from Hong Kong are forecast to increase by an average of 3% each year between 2010 and 2020 to reach 220,000 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 Hong Kong 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 Hong Kong 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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