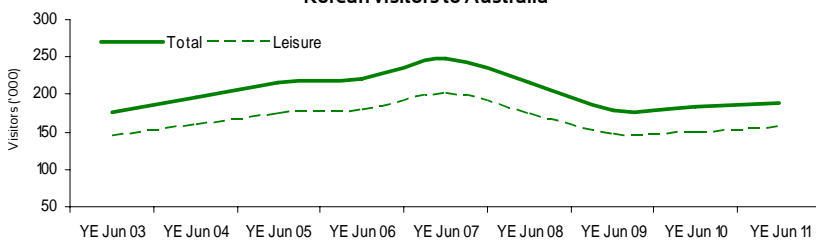


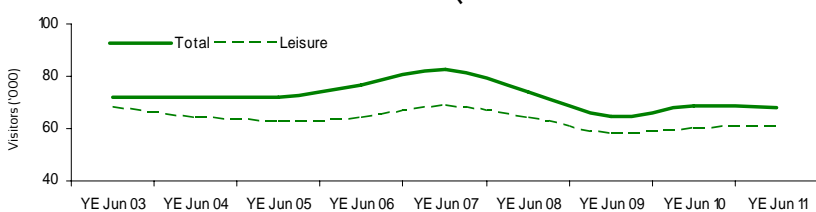
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	189,000	▲ 3%	3%	68,000	▼ -1%	3%
Total ALOS ¹ (nights)	64.3	▼ -2.4		44.0	▼ -2.6	
Leisure² visitors	156,000	▲ 5%	4%	61,000	▲ 2%	4%
Leisure ALOS	50.1	▼ -3.4		35.9	▲ 2.8	
Expenditure (\$m)³	\$987	▲ 6%	5% (share of expenditure)	\$208	▲ 3%	6% (share of expenditure)

Korean visitors to Australia



Korean visitors to Queensland



Korean visitors to Australia

Visitation from Korea increased by 3% over the year ending June 2011. The increase has been the result of improved consumer confidence and a strong Korean Won. Despite this, Koreans average length of stay in Australia declined from 66.7 in the year ending June 2010 to 64.3 in the year ending June 2011.

Korean visitors to Australia are more likely to be on their first visit (70%) than the average international visitor to Australia.

Koreans increased their group and package tour travel (up 23% and 18% respectively), however decreased their free and independent travel with non-group and non-package holidays decreasing by 3%. Despite this, the majority of Korean visitors to Australia do not come on a group or package tour.

Korean visitors to Queensland

In the year ending June 2011, Queensland recorded a slight decline in Korean visitors, driven by declines in VFR and education.

Brisbane and the Gold Coast were the most popular Queensland destinations for Koreans. While the Gold Coast has experienced declines in Korean visitors (down 13%), Brisbane has had increases (up 6%).

Korean Market Insights⁴

Australia's share of Korea's total outbound market has decreased from 2.9% in 2000 to 1.7% in 2010, the result of strong competition for Korean visitors, particularly from Taiwan and the United States. In addition, there has been a shortage of seats and high airfares on direct flights to Australia, particularly in peak season, however indirect services are being used as an alternative option.

Expenditure in Queensland

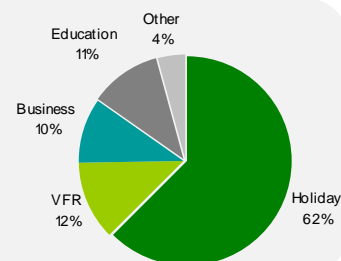
Koreans spent \$208 million on their trips to Queensland in the year ending June 2011. This was an increase of 3% on the previous year.

Korean visitors spend an average of \$3,046 per visitor or \$69 per night while in Queensland. This is higher on a per visitor basis than the average spend of all international visitors to Queensland (\$1,822).

Main purpose of visitation to Australia

Growth in Korean visitors to Australia was driven by holiday (up 9%). Education and business declined, down 16% and 10%, respectively.

Korean visitors are more likely to visit Australia for holiday and less likely to visit for VFR or business purposes than the average international visitor to Australia.

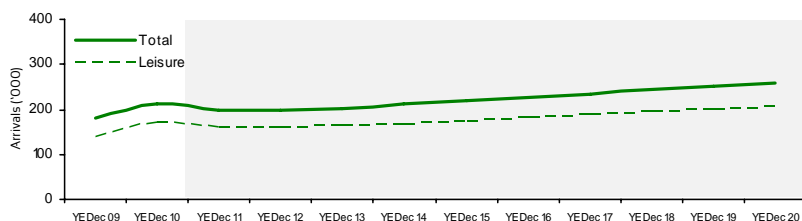


Korean arrivals forecast⁵

Korean arrivals to Australia are forecast to increase by an average of 1.9% each year between 2010 and 2020 to reach 257,000 arrivals in 2020.

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 Korean arrivals to Australia



Note: Numbers shaded are forecasts.

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2011

Note: Korea for the purpose of this report is referring to South Korea

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 South Korean Market Profile 2011
5. Tourism Forecasting Committee 2011 Issue 2

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