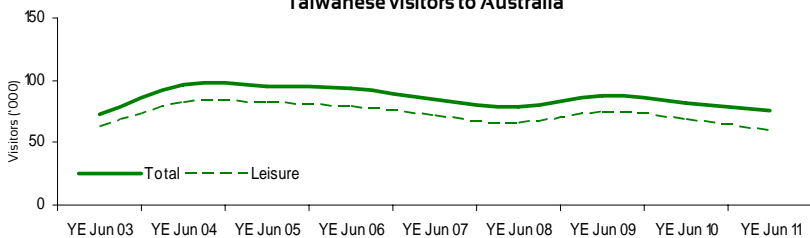


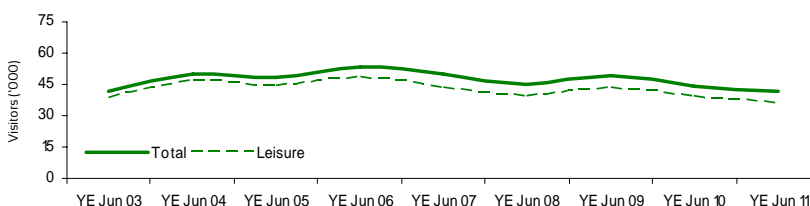
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	76,000	▼ -7%	1%	42,000	▼ -5%	2%
Total ALOS ¹ (nights)	61.7	▲ 5.8		41.2	▲ 8.5	
Leisure² visitors	60,000	▼ -12%	1%	36,000	▼ -8%	2%
Leisure ALOS	44.1	▲ 2.5		29.0	▲ 8.5	
Expenditure (\$m)³	\$325	● 0%	2% (share of expenditure)	\$107	▼ -6%	3% (share of expenditure)

Taiwanese visitors to Australia



Taiwanese visitors to Queensland



Taiwanese Market Insights⁵

Australia's share of Taiwan's total outbound market has decreased from 1.7% in 2000 to 1.1% in 2009. This market has been impacted by strong competition for Taiwanese visitors from Japan and China, as well as a strong Australian dollar and reduced airline capacity. However, Taiwan has a growing economy and strengthening consumer confidence that should yield growth from this market in the future.

Taiwanese visitors to Australia

Taiwanese visitation to Australia continued to decline in the year ending June 2011, driven by decreases in first-time holiday visitors.

While return travellers have been increasing (up 3%), first time visitors to Australia from Taiwan has been declining (down 15%).

There has been growth in Taiwanese visitors staying in backpacker accommodation (up 17%) and travelling unaccompanied (up 5%).

Over 38% of Taiwanese visitors to Australia are youth market⁴ visitors, and this market increased by 5% over the year ending June 2011.

Taiwanese visitors to Queensland

Visitation from Taiwan to Queensland declined in the year ending June 2011, which was less than the decline seen at the national level. The Queensland declines were driven by a soft holiday market (down 17%), however there was strong growth in VFR.

Taiwanese visitors to Queensland most commonly visited Brisbane and the Gold Coast. While Brisbane recorded growth in Taiwanese visitors (up 12%), the Gold Coast had declines (down 29%).

Expenditure in Queensland

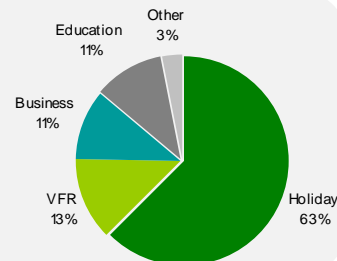
Taiwanese visitors spent \$107 million on their trips to Queensland in the year ending June 2011. This was a decline of 6% over the year.

Taiwanese visitors spend \$2,551 per visitor and \$62 per night on their trips in Queensland. This is higher on a per visitor basis than the average spend of all international visitors to Queensland (\$1,822 per visitor).

Main purpose of visitation to Australia

The decline in Taiwanese visitors was primarily from holiday and education visitors. There was some growth in VFR and business travel.

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

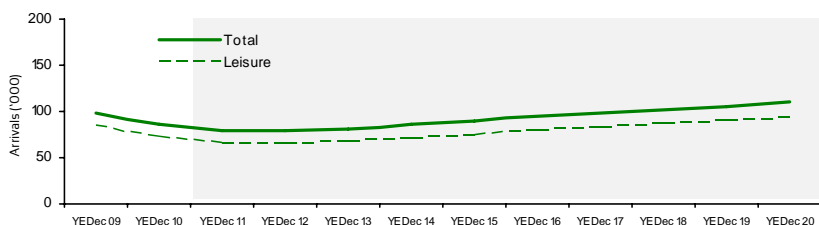


Taiwanese arrivals forecast⁶

Arrivals to Australia from Taiwan are forecast to increase by an average of 2.3% each year between 2010 and 2020 to reach 110,000 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 Taiwanese 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

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. Youth market represents visitors who are aged between 15 and 29 years old.
5. Tourism Australia's Taiwan Outbound Market Share Analysis and Market Update 2010
6. Tourism Forecasting Committee 2011 Issue 2

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