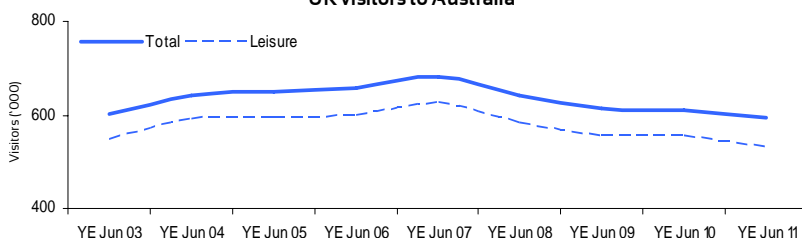


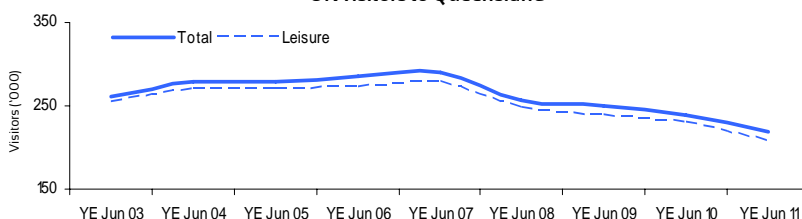
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	593,000	▼ -3%	11%	220,000	▼ -8%	11%
Total ALOS (nights) ¹	35.6	▼ -0.9		21.7	▼ -1.1	
Leisure² visitors	532,000	▼ -4%	13%	207,000	▼ -10%	12%
Leisure ALOS	32.3	▼ -2.0		20.9	● 0.0	
Expenditure (\$m)³	\$1,720	▼ -6%	10% (share of expenditure)	\$378	▼ -19%	10% (share of expenditure)

UK visitors to Australia



UK visitors to Queensland



UK visitors to Australia

The United Kingdom (UK) is Australia's second largest international source market, representing 11% of all international visitors. In the year ending June 2011, UK visitation declined by 3% (or 19,000 visitors).

Around 59% of UK visitors to Australia are repeat travellers and they have declined 2%. First time visitors have also declined by 5%. Most UK visitors to Australia travel unaccompanied (55%) or in an adult couple (30%).

Over 44% of UK visitors are middle aged (30 to 59 years), with 28% being older travellers (60+ years) and youth travellers⁴ (27%). The youth market has declined by 9% (or 17,000 visitors) over the year. The declining youth market has seen a softening in Working Holiday Makers visa grants⁵.

UK visitors to Queensland

Following the national trend, UK visitors to Queensland declined by 8% in the year ending June 2011. This was due to a 15% decline in holiday travel.

Brisbane and Tropical North Queensland were the most popular Queensland regions for UK visitors. Both destinations have experienced a decline in UK travellers of 6% and 18%, respectively.

UK Market Insights⁵

Australia's share of the UK outbound market increased from 1% to 1.1% between 2000 and 2010. The UK has been impacted by a lagging economy, the Icelandic volcanic ash cloud, the strong Australian dollar and increasing global competition amongst destinations. The growth of outbound Australian travel has driven up the price of flights on the UK-Australia route and stifled air capacity for UK travellers to Australia.

Expenditure in Queensland

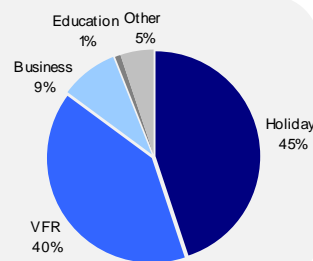
UK visitors spent \$378 million on their trips to Queensland in the year ending June 2011, a decline of 19% from the year ending June 2010.

Visitors from the UK spend \$1,715 per visitor while on their trips to Queensland. This is slightly lower than the average spend of all international visitors to Queensland (\$1,822). UK visitors are now spending \$224 less per visitor than they were in the year ending June 2010.

Main purpose of visitation to Australia

Visitation from the UK to Australia declined in the year ending June 2011, driven by large declines in holiday and VFR travel. Regardless, leisure (holiday and VFR) travel continues to account for 85% of UK visitors to Australia.

UK visitors increased their business, employment and education travel to Australia.

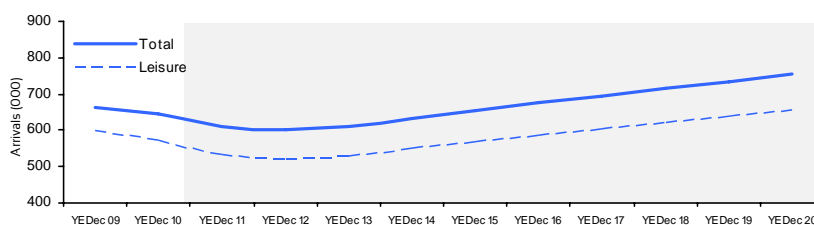


UK arrivals forecast⁶

UK arrivals to Australia are forecast to increase by 1.5% per annum between 2010 and 2020 to reach 754,000 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 UK arrivals to Australia



Note: Numbers shaded are forecasts.

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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 UK Market Profile 2011
6. Tourism Forecasting Committee 2011 Issue 2

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