

Market Snapshot

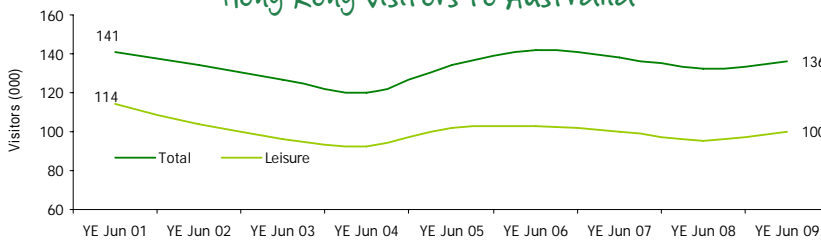
Year ended June 2009



Hong Kong

| | Australia | Change Jun 08 to Jun 09 | Share of international visitors | Queensland | Change Jun 08 to Jun 09 | Share of visitors to Qld |
|--------------------------------------|-----------|-------------------------|---------------------------------|------------|-------------------------|------------------------------|
| Total visitors | 136,000 | 3% ▲ | 3% | 35,000 | -17% ▼ | 2% |
| Total ALOS ¹ (nights) | 33.7 | 2.6 ▲ | | 18.9 | -9.1 ▼ | |
| Leisure² visitors | 100,000 | 5% ▲ | 3% | 31,000 | -9% ▼ | 2% |
| Leisure ALOS | 17.8 | 1.8 ▲ | | 11.3 | 2.1 ▲ | |
| Expenditure (\$m)³ | 540 | 12% ▲ | 3% (share of expenditure) | 91 | -29% ▼ | 2% (share of expenditure) |

Hong Kong visitors to Australia



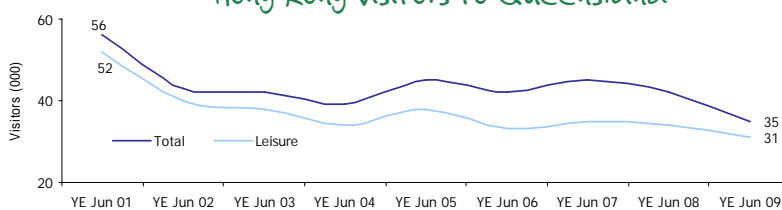
Hong Kong visitors to Australia

After the SARS dip in the year ended June 2003, visitors from Hong Kong to Australia increased but declined again from the year ended June 2006.

The majority of visitors from Hong Kong were repeat visitors (68%), (greater than the national average of 60%). This market saw an increase of 7% over the year ended June 2009.

Over half of Hong Kong visitors travelled unaccompanied (64%), while 17% travelled as part of an adult couple.

Hong Kong visitors to Queensland



Hong Kong visitors to Queensland

Hong Kong visitors to Queensland declined over the year to June 2009. This was driven by declines in the visiting friends or relatives and holiday markets (down 27% and 4% respectively).

First time visitors (to Australia) accounted for 54% of the Hong Kong market to Queensland, and declined by 10% over the year to June 2009.

Queensland's most popular regions for Hong Kong visitors were Brisbane and the Gold Coast (48% and 43% respectively). The Hong Kong market to Brisbane and the Gold Coast declined by 26% and 6%, respectively over the year to June 2009.

Visitors from Hong Kong spent \$91 million on their trip to Queensland in the year to June 2009. This was a decline of 29% on the previous year.

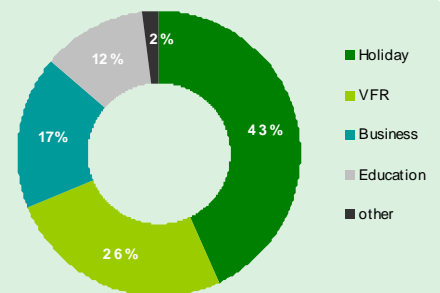
The Hong Kong market spend per visitor in Queensland was \$2,587, higher than the total international average spend (\$1,986).

Main purpose of visitation to Australia

There was a 3% increase in Hong Kong visitors to Australia in the year to June 2009. This was driven by increases in the holiday and visiting friends or relatives (VFR) markets (up 7% and 6% respectively).

However the business market declined by 8% over the year to June 2009, while business visitor nights increased (up 4%).

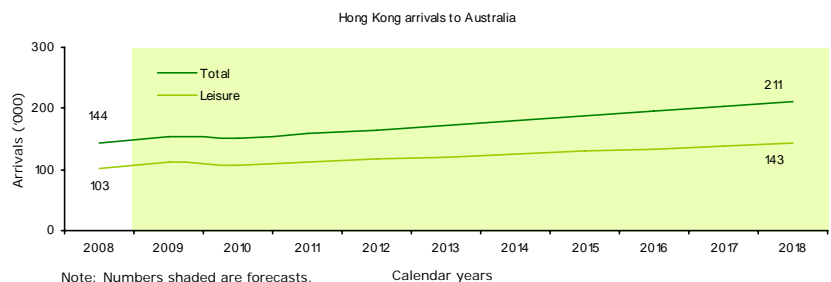
An average Hong Kong holiday visitors (20.7 nights) had a longer stay than VFR visitors (15.6 nights).



Hong Kong arrivals forecast ⁴

Hong Kong is an important source of visitors to Australia but also an important hub for travellers from Europe and other Asian ports travelling to Australia. Its aviation hub is likely to increase in coming years to meet the demand.

Arrivals to Australia from Hong Kong are forecast to increase by an average of 4% each year from 2008 to reach 211,000 arrivals in 2018.



Note: Numbers shaded are forecasts.

Calendar years

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 Forecasting Committee 2009 Issue 1

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2009