

# Market Snapshot

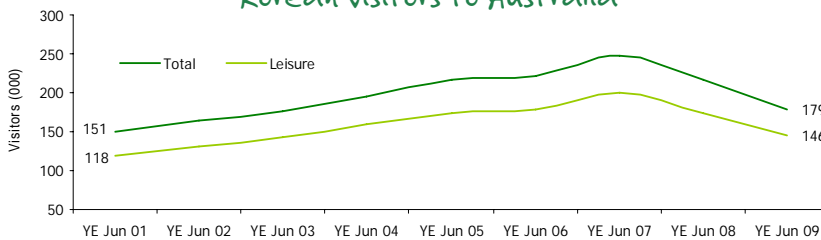
Year ended June 2009



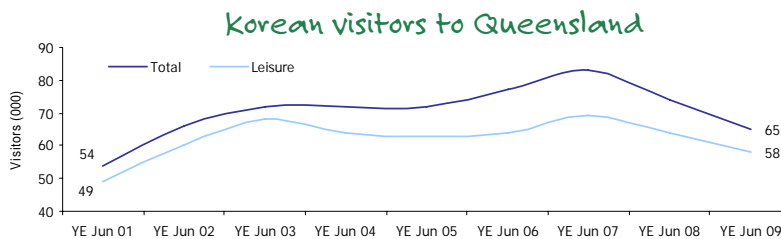
## Korea

	Australia	Change Jun 08 to Jun 09	Share of international visitors	Queensland	Change Jun 08 to Jun 09	Share of visitors to Qld
<b>Total visitors</b>	179,000	-18% ▼	4%	65,000	-12% ▼	3%
Total ALOS <sup>1</sup> (nights)	64.2	15.6 ▲		47.4	10.6 ▲	
<b>Leisure<sup>2</sup> visitors</b>	146,000	-17% ▼	4%	58,000	-9% ▼	3%
Leisure ALOS	42.4	11.2 ▲		31.2	8.1 ▲	
<b>Expenditure (\$m)<sup>3</sup></b>	982	8% ▲	6% (Share of expenditure)	225	17% ▲	6% (Share of expenditure)

### Korean visitors to Australia



### Korean visitors to Queensland



After gradual growth from the year ended June 2001, the Korean market declined between June 2007 and June 2009. This would have been influenced by the decrease in the value of the Korean Won in early 2009, in addition to the Global Financial Crisis (GFC) and Swine flu concerns.

Compared to the national average more travellers from Korea were on their first visit (40% compared to 68%).

Over half (52%) of Korean visitors travelled unaccompanied, while 28% travelled as an adult couple.

While 16% of Korean visitors to Australia were backpackers<sup>4</sup>, this market declined by 7% over the year to June 2009.

### Korean visitors to Queensland

Queensland recorded a decline in the number of Korean visitors from the year ended June 2007 to the year ended June 2009.

The Gold Coast and Brisbane were the State's most visited regions for Korean visitors (52% and 49% respectively). Korean visitors to the Gold Coast and Brisbane declined by 17% and 14% respectively over the year to June 2009.

Koreans spent \$225 million on their trip to Queensland in the year to June 2009. This was an increase of 17% over the year.

Korean spend per visitor in Queensland was \$3,451, higher than the total international average spend (\$1,986), and one of the highest spend per visitor for Queensland.

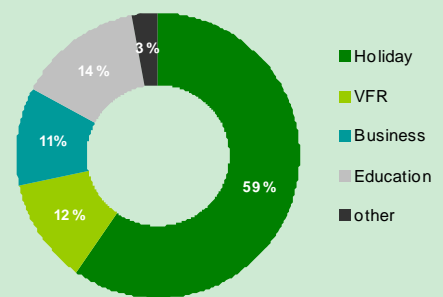
### Main purpose of visitation to Australia

The decline in holiday visitors was the key contributor to the decline in Korean visitation to Australia in the year to June 2009.

The holiday market accounted for three in five Korean visitors to Australia, and declined by 23% over this period. The decline was impacted by Swine flu concerns in the June quarter 2009.

The visiting friends or relatives (VFR) and business markets also saw declines of 12% and 13%, respectively over this period.

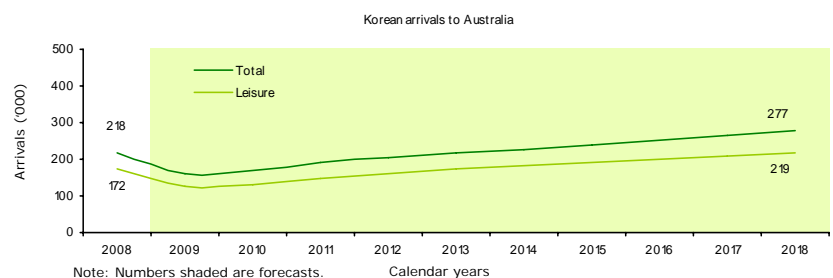
Korean education visitors declined as did education visitor nights over the year to June 2009. This market's average length of stay was 185.2 nights, therefore had an influence on the overall Korean visitor length of stay (64.1 nights).



### Korean arrivals forecast<sup>5</sup>

Korean arrivals to Australia are forecast to increase by an average of 2% each year from 2008 to reach 277,000 arrivals in 2018.

Outbound travel is an important part of life for Koreans, but the sharp fall in the value of the Korean Won during 2008 discouraged Koreans from travelling, reflected by the 21% decline in total departures in the first four months of 2009.



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. Backpackers are classified as visitors who spent at least one night in a backpacker or hostel  
 5. Tourism Forecasting Committee 2009 Issue 1

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