

Market Snapshot

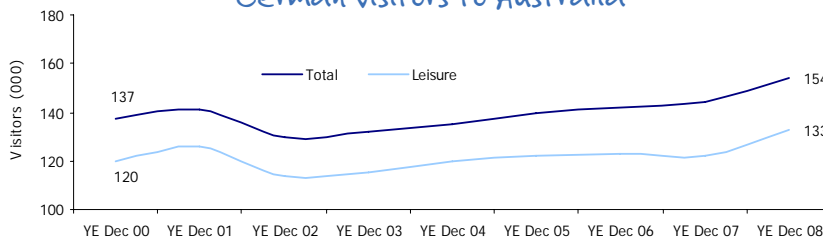
Year ended December 2008



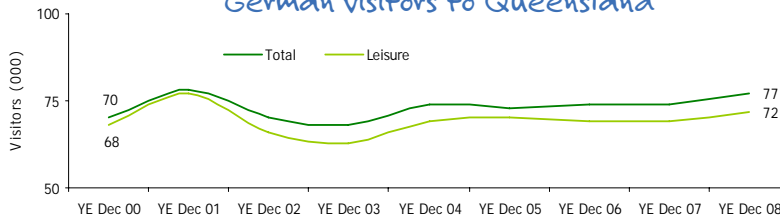
Germany

	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec 08	Share of visitors to Qld
Total visitors	154,000	7% ▲	3%	77,000	4% ▲	4%
Total ALOS (nights) ¹	46.2	-0.3 ▼		27.9	2.9 ▲	
Leisure² visitors	133,000	9% ▲	3%	72,000	4% ▲	4%
Leisure ALOS	36.9	-3.7 ▼		22.5	2.0 ▲	
Expenditure (\$m)³	634	12% ▲	4% (Share of expenditure)	174	22% ▲	4% (Share of expenditure)

German visitors to Australia



German visitors to Queensland



German visitors spent \$174 million in Queensland in the year to December 2008. This was an increase of 22% on the same period last year.

German visitor spend per visitor in Queensland was \$2,254. This is higher than the total international average spend (\$1,975).

German visitors to Australia

While German visitor numbers to Australia have been steadily increasing since 2002, however length of stay has remained relatively stable.

First time visitors to Australia accounted for 60% of the German market, this market increased 6% over the year to December 2008. Repeat visitors also saw an increase (up 8%) over the same period.

Almost three in five (59%) of German visitors travel alone, while 24% travel with a partner while in Australia.

35% of German visitors to Australia were backpackers⁴, this market increased by 2% over year to December 2008.

German visitors to Queensland

First time visitors (to Australia) accounted for 69% of the German market to Queensland. This market has declined by 2% over the year to December 2008.

Tropical North Queensland (TNQ) and Brisbane were the State's most visited regions for German visitors. Germans to TNQ and Brisbane increased by 6% and 3% respectively over the year to December 2008.

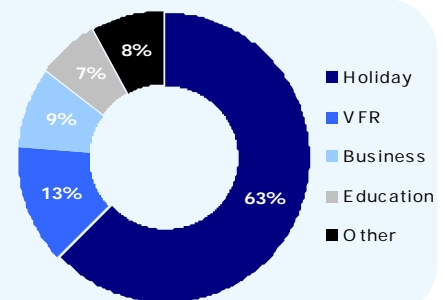
German visitors disperse to more regions than most other international visitors, with regions such as the Fraser Coasts and the Whitsundays seeing a large proportion of the market making a stopover.

Main purpose of visitation to Australia

The holiday market accounted for three in five German visitors to Australia. This market increased by 4% over the year to December 2008. German holiday visitor nights also increased (up 1%). Their average length of stay was 44 nights.

The visiting friends or relatives (VFR) market also saw an increase of 6% over the same period. German VFR visitors had a shorter length of stay than the holiday market with average length of stay at 28.3 nights.

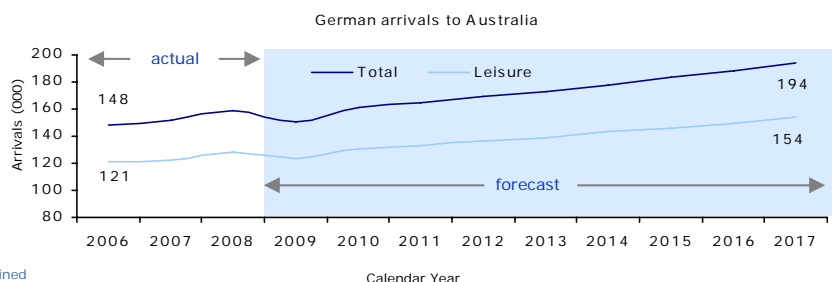
Education visitors from Germany accounted for the same proportion of the market as the total international market average (which is 7%). Education visitors from Germany increased by 23% over the year to December 2008, while visitor nights were up by 27%.



German arrivals forecast⁵

In 2007 there were 86.5 million outbound departures from Germany, a 2% increase on the same period the previous year. Australia's share of this market was 0.2%.

Arrivals to Australia from Germany are forecast to increase by an average of 3% each year from 2012 to reach 194,000 arrivals in 2017.



1. Average length of stay
 2. Leisure is holiday and visiting friends and 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 2008 Issue 2

Note All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2008