

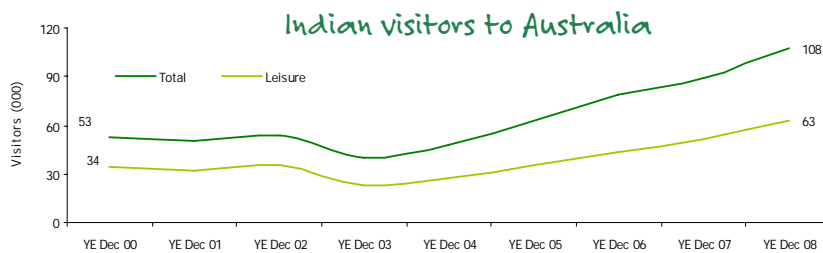
# Market Snapshot

Year ended December 2008



## India

	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec08	Share of visitors to Qld
<b>Total visitors</b>	108,000	21% ▲	2%	32,000	14% ▲	2%
Total ALOS <sup>1</sup> (nights)	60.8	6.6 ▲		36.4	16.9 ▲	
<b>Leisure<sup>2</sup> visitors</b>	63,000	21% ▲	2%	22,000	5% ▲	1%
Leisure ALOS	34.6	2.5 ▲		19.6	6.4 ▲	
<b>Expenditure (\$m)<sup>3</sup></b>	506	41% ▲	3% (share of expenditure)	89	n/p	2% (share of expenditure)



### Indian visitors to Australia

After a small dip from 2001 to 2003, Indian numbers to Australia have continued to grow.

First time visitors to Australia accounted for 59% of the Indian market, this market increased by 17% over the year to December 2008.

Repeat visitors also increased (up 28%) over the same period.

64% of Indian visitors travel alone (higher than the average total international market of 55%).



### Indian visitors to Queensland

First time visitors (to Australia) accounted for 72% of the Indian market to Queensland. This market has increased by 12% over the year to December 2008.

The Gold Coast and Brisbane were the State's most visited regions for Indian visitors. 44% of Indian visitors to Queensland went to the Gold Coast, while 40% had a stop over in Brisbane. Indian visitors to the Gold Coast declined by 6% over the last year.

Tropical North Queensland was the third most popular Queensland region for Indian visitors with 38% of Indian visitors to Queensland making a stopover there. Indian visitors to TNQ increased by 21% over the year to December 2008.

Indian visitors spent \$89 million in Queensland in the year to December 2008.

Indian spend per visitor in Queensland was \$2,823, significantly higher than the total international average spend (\$1,975).

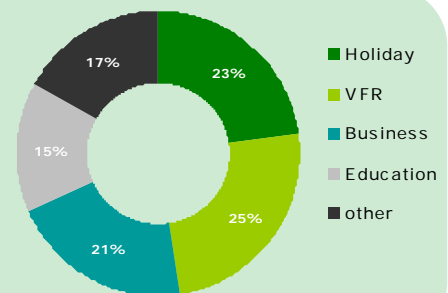
### Main purpose of visitation to Australia

The holiday market accounted for just under one quarter of all Indian visitors to Australia. This market increased by 20% over the year to December 2008. Indian holiday visitor average length of stay was 16.8 nights.

The Indian business market was proportionally a much larger market than most international visitors (the total international business market was 14%).

The business market increased by 4% over the year to December 2008, business visitor nights declined over the same period (down 5%).

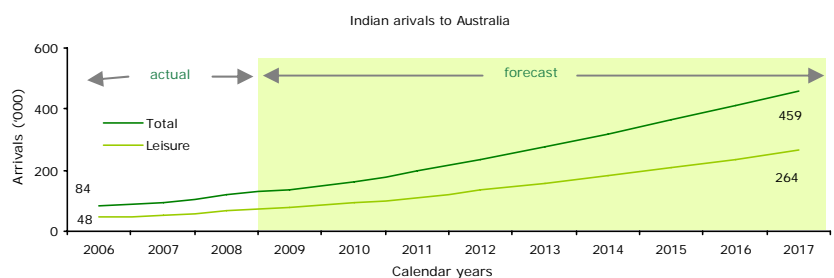
Indian education visitors increased as did education visitor nights over the year to December 2008. This market's average length of stay was 161.6 nights and this influenced the overall Indian visitor length of stay (60.8 nights).



### Indian arrivals forecast<sup>4</sup>

In 2007 there were eight million outbound departures by Indian residents, this was an increase of 17% of 2006. Australia's share of this market is 1%, with huge potential for growth.

Arrivals to Australia from India are forecast to increase by an average of 14% each year from 2012 to reach 459,000 arrivals in 2017.



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 2008 Issue 2

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