

Market Snapshot

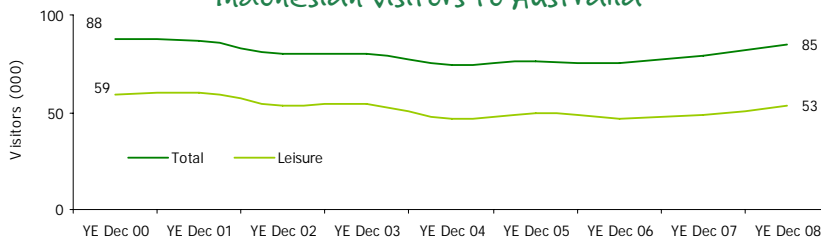
Year ended December 2008



Indonesia

	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	85,000	8% ▲	2%	14,000	8% ▲	1%
Total ALOS ¹ (nights)	41.9	-0.5 ▼		21.5	-2.8 ▼	
Leisure² visitors	53,000	8% ▲	1%	9,000	-10% ▼	1%
Leisure ALOS	18.7	0.3 ▲		7.2	-3.5 ▼	
Expenditure (\$m)³	395	9% ▲	2% (Share of expenditure)	26	24% ▲	1% (Share of expenditure)

Indonesian visitors to Australia



Indonesian visitors to Australia

The Indonesian market to Australia is a very small market and has had relatively little change over the past eight years.

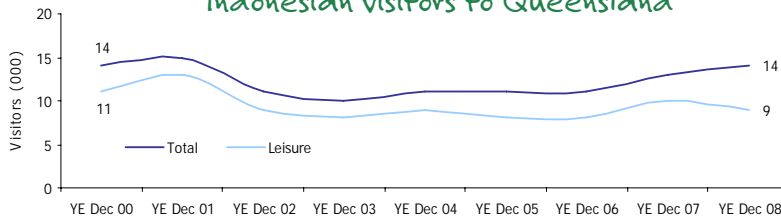
First time visitors to Australia accounted for 27% of the Indonesian market, this market increased by 4% over the year to December 2008.

Repeat visitors have also increased (up 9%) over the same period.

61% of Indonesian visitors travel alone (higher than the average total international market of 55%).

Indonesians travelling as a family group accounted for 14% of the Indonesian market. This was a higher percentage than the total international family market (accounting for 9%).

Indonesian visitors to Queensland



Indonesian visitors to Queensland

Repeat visitors (to Australia) accounted for 66% of the Indonesian market to Queensland. This market has increased over the year to December 2008.

Brisbane was the State's most visited region for Thai visitors. Of all Indonesian visitors to Queensland, 53% had a stop over in Brisbane.

Indonesian visitors spent \$26 million in Queensland in the year to December 2008.

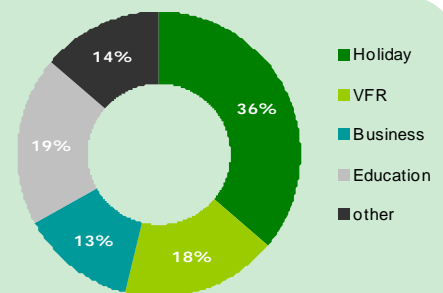
Indonesian spend per visitor in Queensland was \$1,880, lower than the total international average spend (\$1,975).

Main purpose of visitation to Australia

The holiday market accounted for just over one third of all Indonesian visitors to Australia. This market increased by 7% over the year to December 2008.

Indonesian holiday visitor nights also increased (up 15%) over the year to December 2008. Their average length of stay was 17.7 nights.

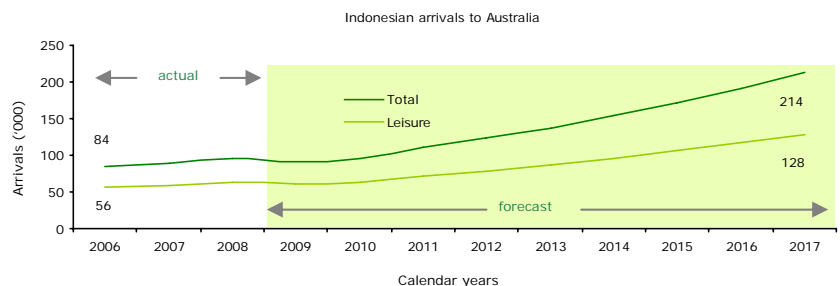
Indonesian education visitors average length of stay was 139.5 nights and this influenced the overall Indonesian visitor length of stay. Education visitors from Indonesia accounted for a larger proportion of the market than most other markets and also the total international market average (which is 7%).



Indonesian arrivals forecast ⁴

There were 4.6 million outbound departures by Indonesian residents in 2007, this was a decline of 9% compared with 2006. Australia's share of the outbound market is 1.9%.

Arrivals to Australia from Indonesia are forecast to increase by an average of 12% each year from 2012 to reach 214,000 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