

Market Snapshot

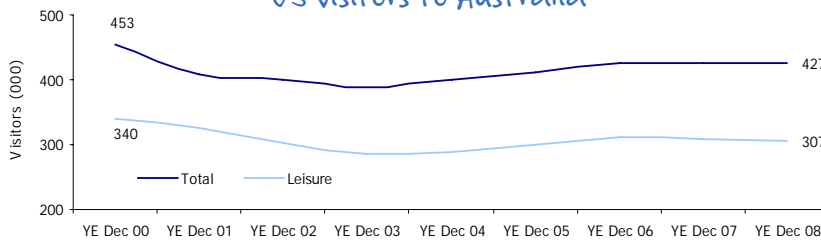
Year ended December 2008



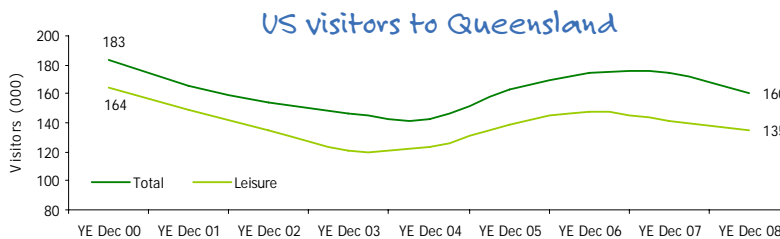
United States (US)

	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	427,000	no change	8%	160,000	-8% ▼	8%
Total ALOS (nights) ¹	21.6	-1.6 ▼		11.9	-0.3 ▼	
Leisure² visitors	307,000	no change	8%	135,000	-4% ▼	8%
Leisure ALOS	16.1	-0.9 ▼		9.0	0.8 ▲	
Expenditure (\$m)³	1,250	-7% ▼	7% (Share of expenditure)	264	-13 ▼	7% (Share of expenditure)

US visitors to Australia



US visitors to Queensland



US visitor numbers to Australia have continued to grow very gradually since the year ending December 2003, however plateaued in 2008.

First time visitors to Australia accounted for 59% of the US market, this market declined by 3% over the year to December 2008. Repeat visitors have seen an increase of 6% over the same period.

59% of US visitors travel alone, while 22% travel with a partner while in Australia.

11% of US visitors to Australia were backpackers⁴, this market declined by 8% over the year to December 2008.

US visitors to Queensland

First time visitors (to Australia) accounted for 70% of the US market to Queensland. This market has declined by 9% over the year to December 2008.

Tropical North Queensland (TNQ) was the State's most visited region for US visitors with 56% of US visitors to Queensland making a stopover there. US visitors to TNQ declined by 13% over the year to December 2008.

With the exception of Brisbane (40% of US visitors had a stopover) and the Gold Coast (17%) US visitor dispersal to Queensland's other regions was relatively low.

US visitors spent \$264 million in Queensland in the year to December 2008. This was a decline of 13% on the same period last year.

US visitor spend per visitor in Queensland was \$1,645, lower than the total international average spend (\$1,975).

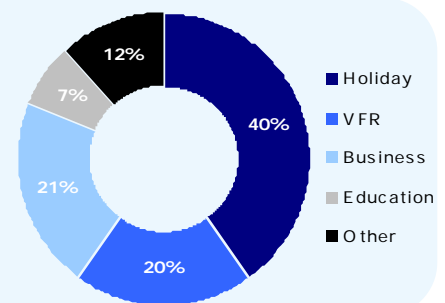
Main purpose of visitation to Australia

The holiday market accounted for two in five US visitors to Australia. This market declined by 1% over the year to December 2008. The visiting friends or relatives (VFR) market saw a small increase of 3% over the same period.

The percentage US visitors travelling to Australia for business was higher than the total international business market (21% compared with 15%).

The US business visitor market declined by 2% over the year to December 2008, business visitor nights also declined (down 14%).

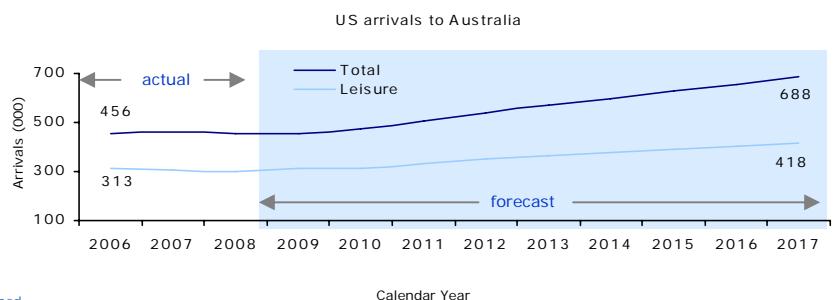
Education visitors from the US declined by 17% over the year to December 2008, education visitor nights also saw a decline over the same period.



US arrivals forecast⁵

In the January-July 2008 period there were 24.4 million outbound departures from the US, a 1% increase on the same period the previous year. Australia's share of this market was 1%.

Arrivals to Australia from the US are forecast to increase by an average of 4% each year from 2012 to reach 688,000 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