

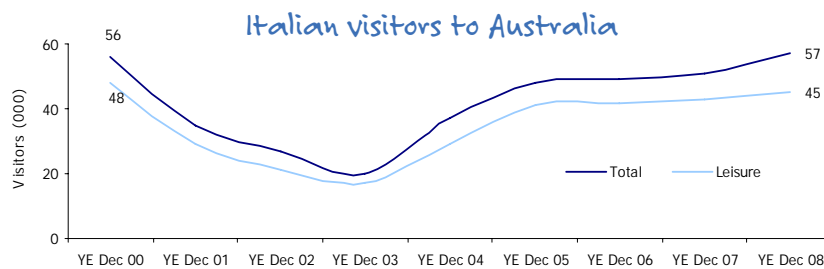
Market Snapshot

Year ended December 2008



Italy

	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	57,000	12% ▲	1%	27,000	17% ▲	1%
Total ALOS (nights) ¹	44.8	6.5 ▲		21.4	0.5 ▲	
Leisure² visitors	45,000	5% ▲	1%	25,000	19% ▲	1%
Leisure ALOS	38.7	4.9 ▲		16.5	-1.5 ▼	
Expenditure (\$m)³	234	22% ▲	1% (Share of expenditure)	50	11% ▲	1% (Share of expenditure)



Italians visiting Australia

Since 2003 Italian visitor numbers to Australia have been growing, as has their average length of stay (although only gradual).

First time visitors to Australia accounted for 70% of the Italian market. The market increased by 20% over the year to December 2008.

Just under half (49%) of Italian visitors travel alone, while they are more likely to travel with a partner (31%) while in Australia compared with 23% for the international average.

23% of Italian visitors to Australia were backpackers⁴, this market increased over year to December 2008.



Italians visiting Queensland

First time visitors (to Australia) accounted for 80% of the Italian market to Queensland. This market has increased by 27% over the year to December 2008.

Tropical North Queensland (TNQ) and Brisbane were the State's most visited regions for Italian visitors (61% and 49% made a stopover respectively). Visitors to TNQ were up by 16% over the year to December 2008.

The Whitsundays and Gold Coast were also popular, however visitation to both these regions declined over the year to December 2008.

Italians spent \$50 million in Queensland in the year to December 2008. This was an increase of 11% on the same period last year.

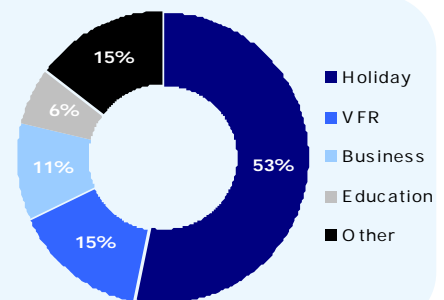
Italian spend per visitor while in Queensland was \$1,845, lower than the total international average spend (\$1,975).

Main purpose of visitation to Australia

The holiday market accounted for just over half of Italian visitors to Australia. This market increased by 2% over the year to December 2008.

Italian holiday visitor nights increased by 6% over the year to December 2008. Their average length of stay was 42.2 nights, which was an increase of 1.7 nights over the year.

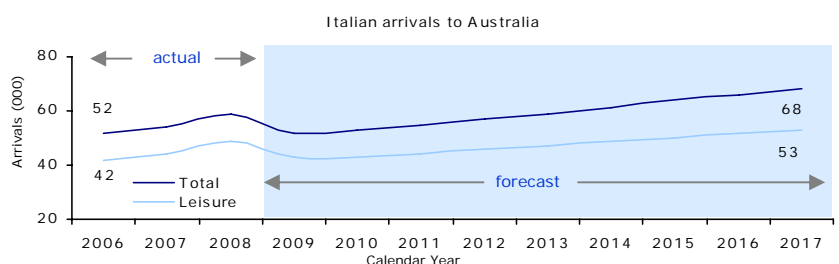
The visiting friends or relatives (VFR) market saw a decline of 6% over the same period. However Italian VFR visitor nights increased, which resulted in an increased length of stay by VFR visitors.



Italian arrivals forecast⁵

Italy has experienced four periods of recession in the last decade, although strong VFR ties with Australia continue to help boost growth.

Arrivals to Australia from Italy are forecast to increase by an average of 2% each year from 2012 to reach 68,000 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