

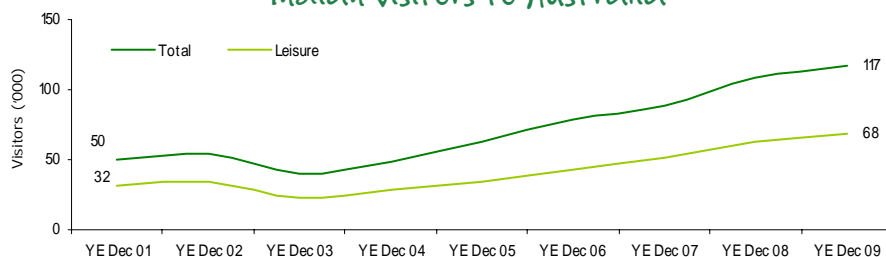
Market Snapshot

Year ended December 2009

India

	Australia	Change Dec 08 to Dec 09	Share of international visitors	Queensland	Change Dec 08 to Dec 09	Share of visitors to Qld
Total visitors	117,000	8% ▲	2%	27,000	-16% ▼	1%
Total ALOS ¹ (nights)	61.2	0.4 ▲		32.6	-3.8 ▼	
Leisure² visitors	68,000	8% ▲	2%	19,000	-14% ▼	1%
Leisure ALOS	36.4	1.8 ▲		16.4	-3.2 ▼	
Expenditure (\$m)³	573	13% ▲	3% (share of expenditure)	73	-18% ▼	2% (share of expenditure)

Indian visitors to Australia



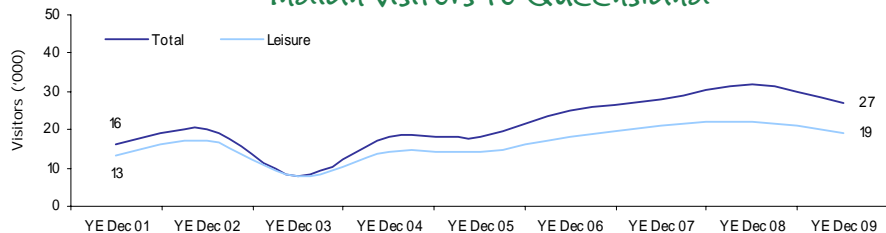
Indian visitors to Australia

Since the year ended December 2003, Indian visitor numbers to Australia have increased, reaching 117,000 visitors in the year ended December 2009.

The majority of visitors from India were first time visitors (56%). Both the repeat and first time markets increased over the year to December 2009 (up 13% and 3% respectively).

A growing number of Indian visitors are travelling unaccompanied (68%), while 17% travelled as part of an adult couple.

Indian visitors to Queensland



Indian visitors to Queensland

Indian visitors to Queensland declined in the year ended December 2009, driven by a decline in the holiday market (down 17%).

Brisbane was the Queensland region most visited for Indian visitors (52% made a stopover), increasing 8% over the year to December 2009. In contrast, the Gold Coast and Tropical North Queensland saw declines in Indian visitors.

Indian visitors spent \$73 million on their trips to Queensland in the year ended December 2009.

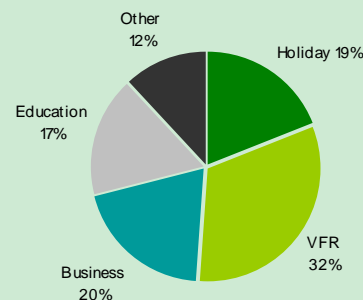
Indian spend per visitor in Queensland was \$2,732. This is higher than the average spend of all international visitors to Queensland (\$1,973).

Main purpose of visitation to Australia

There was an increase in Indian visitation to Australia in the year ended December 2009. This was driven by increases in the VFR (visiting friends or relatives) and education markets (up 37% and 25%, respectively)

Indian VFR visitors (49.6 nights) had a longer average length of stay than holiday visitors (19.5 nights).

The Indian education market accounts for a much larger proportion of visitors relative to other source markets (representing 17% of Indian visitors, whereas on average, education visitors represent 8% of international visitors). The education market contributes to the extended length of stay and higher than average expenditure.

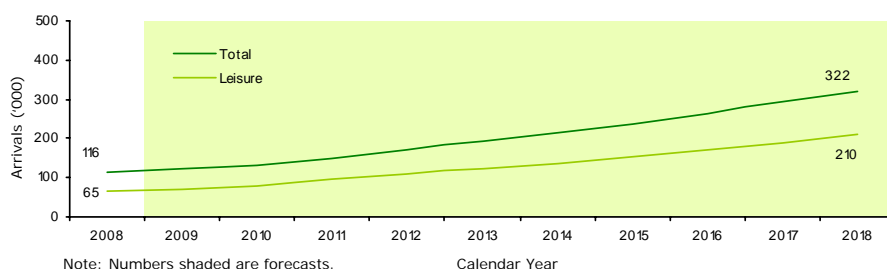


Indian arrivals forecast ⁴

India arrivals to Australia are forecast to increase by an average of 11% each year from 2008 to reach 322,000 arrivals in 2018.

Please note that arrivals forecast are based on total visitor arrivals into Australia, and therefore may vary from the visitation figures provided in the table above (as visitors are defined as persons over the age of 15, who are visiting Australia for 12 months or less).

Indian arrivals to Australia



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 2009 Issue 2

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2009