

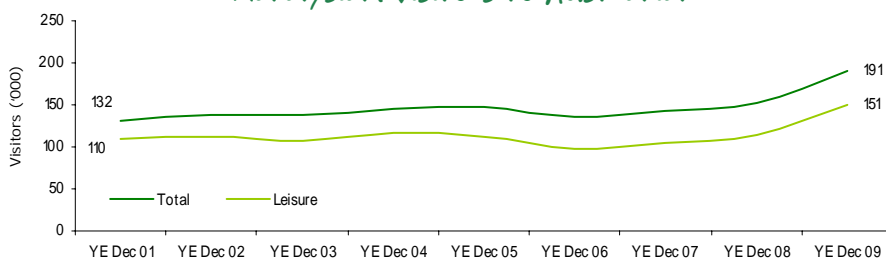
Market Snapshot

Year ended December 2009

Malaysia

	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	191,000	25% ▲	4%	41,000	0% ▬	2%
Total ALOS ¹ (nights)	35.4	-3.6 ▼		14.2	-4.1 ▼	
Leisure² visitors	151,000	31% ▲	4%	35,000	-5% ▼	2%
Leisure ALOS	14.2	-0.6 ▼		7.6	0.5 ▲	
Expenditure (\$m)³	773	13% ▲	5% (share of expenditure)	75	-16% ▼	2% (share of expenditure)

Malaysian visitors to Australia



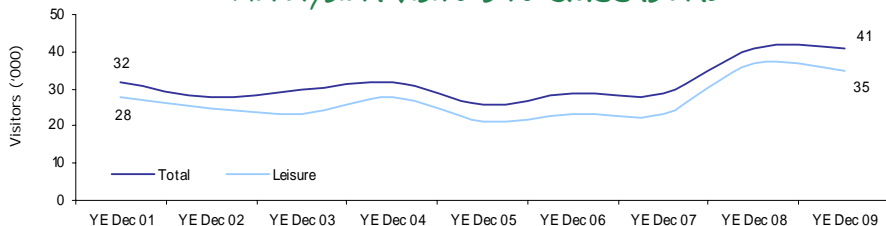
Malaysian visitors to Australia

The Malaysian market to Australia has remained relatively stable since the year ended December 2004. However, in the year ended December 2009 there was an increase in visitors from Malaysia coinciding with the growth in air capacity.

A large proportion of visitors from Malaysia were repeat visitors (74%), compared with the average international visitor to Australia (62%) in the year to December 2009.

Half of all visitors from Malaysia travelled unaccompanied, while 17% travelled as an adult couple and 18% were part of a family group.

Malaysian visitors to Queensland



Malaysian visitors to Queensland

Following a return to growth Malaysian visitor numbers have remained steady on the level achieved in 2008. In the year ended December 2009, the number of Malaysian visitors to Queensland remained steady.

The Gold Coast and Brisbane (66% and 39% made a stopover respectively) were the Queensland regions most visited by Malaysians. However, both regions saw declines in Malaysian visitors over the last 12 months (down 13% and 11% respectively).

Malaysians spent \$75 million on their trips to Queensland in the year to December 2009. This was a decline of 16% over the year.

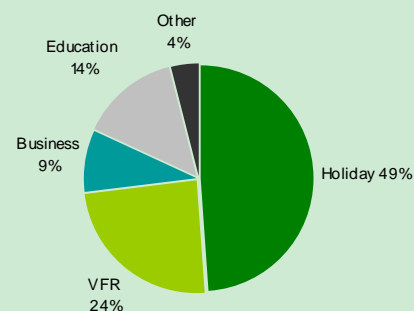
Malaysian spend per visitor in Queensland was \$1,833. This is lower than the average spend of all international visitors to Queensland (\$1,973).

Main purpose of visitation to Australia

The holiday and visiting friends or relatives (VFR) markets both increased over the year to December 2009 (up 29% and 41%, respectively). This contributed to the increase in total visitors from Malaysia.

However the business visitor market declined by 5%, however business visitor nights increased over the same period (up 7%).

Education visitors increased by 29% with nights increasing by 14% over the year to December 2009. This market's average length of stay was 156.4 nights influencing the overall Malaysian visitor length of stay.

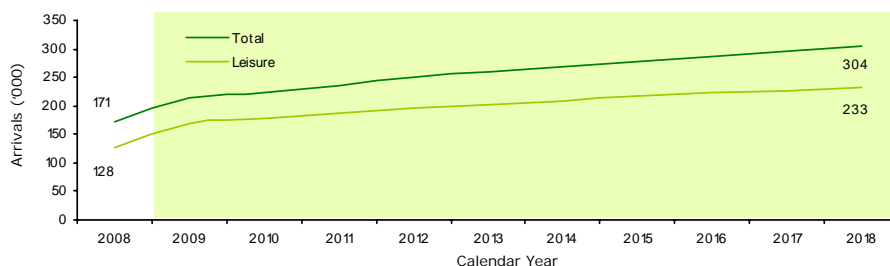


Malaysian arrivals forecast ⁴

Malaysian arrivals to Australia are forecast to increase by an average of 6% each year from 2008 to reach 304,000 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).

Malaysian arrivals to Australia



Note: Numbers shaded are forecasts.

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