

# Market Snapshot

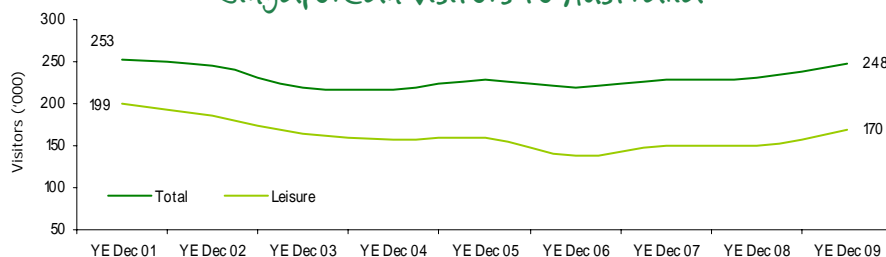
Year ended December 2009

## Singapore

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	Australia	Change Dec 08 to Dec 09	Share of international visitors	Queensland	Change Dec 08 to Dec 09	Share of visitors to Qld
<b>Total visitors</b>	248,000	7% ▲	5%	43,000	-2% ▼	2%
Total ALOS <sup>1</sup> (nights)	23.0	0.3 ▲		12.3	-0.8 ▼	
<b>Leisure<sup>2</sup> visitors</b>	170,000	14% ▲	4%	36,000	6% ▲	2%
Leisure ALOS	11.3	0.5 ▲		7.9	0.5 ▲	
<b>Expenditure (\$m)<sup>3</sup></b>	804	1% ▲	5% (share of expenditure)	88	4% ▲	2% (share of expenditure)

### Singaporean visitors to Australia



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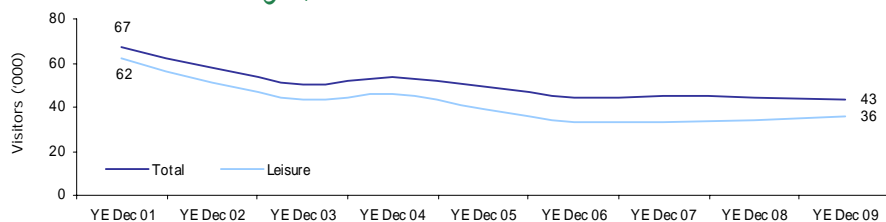
In the year ended December 2009, there was a return to growth in visitation from Singapore.

The majority of Singapore visitors to Australia were repeat visitors (82%). On average 62% of all international visitors to Australia are repeat visitors.

The majority of Singaporean visitors travelled unaccompanied (56%), while 19% travelled as an adult couple, and 15% as part of a family group.

The majority of Singaporeans did not travel on a package (91%).

### Singaporean visitors to Queensland



### Singaporean visitors to Queensland

In contrast to Australia, the number of visitors from Singapore to Queensland remained largely stable in recent years.

Brisbane and the Gold Coast were the Queensland regions most visited by Singaporeans (58% and 51% made a stopover respectively). Singapore visitors to Brisbane increased (up 14%), while visitation to the Gold Coast declined (down 8%) over the year to December 2009.

Singapore visitors spent \$88 million on their trips to Queensland in the year to December 2009. This was an increase of 4% over the year.

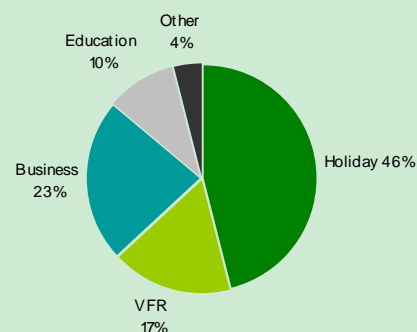
Singaporean spend per visitor in Queensland was \$2,051. This is slightly higher than the average spend of all international visitors to Queensland (\$1,973).

### Main purpose of visitation to Australia

There was a 7% increase in Singaporean visitors to Australia in the year to December 2009. This was driven by strong growth in the holiday and VFR (visiting friends or relatives) markets (up 13% and 24%, respectively).

The business market declined by 10%, with business visitor nights also declining over the same period (down 3%).

Education visitors stayed on average 117.5 nights and this influenced the overall average length of stay. Singapore's education visitors accounted for a larger proportion of the market than the average international market (10% compared to 8%).

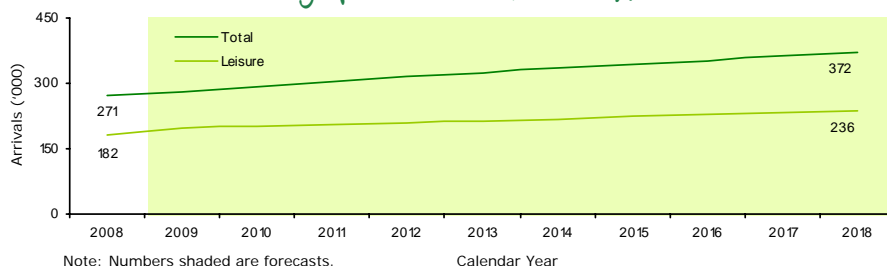


### Singaporean arrivals forecast<sup>4</sup>

Singapore arrivals to Australia are forecast to increase by an average of 3% each year from 2008 to reach 372,000 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).

### Singaporean 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