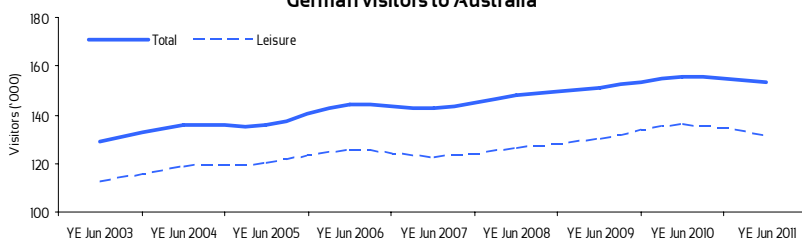


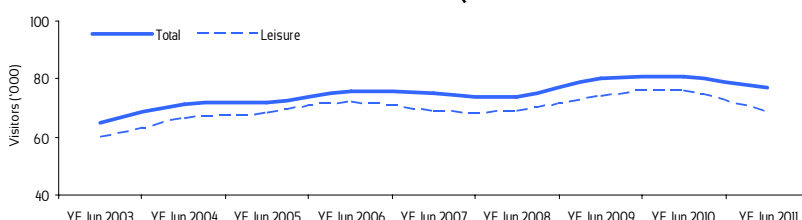
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	153,000	▼ -2%	3%	77,000	▼ -5%	4%
Total ALOS (nights) ¹	43.2	▼ -2.1		27.3	▲ 0.6	
Leisure² visitors	131,000	▼ -4%	3%	69,000	▼ -9%	4%
Leisure ALOS	37.1	▼ -1.1		22.7	▲ 1.1	
Expenditure (\$m)³	\$533	▼ -9%	3% (share of expenditure)	\$159	▼ -11%	4% (share of expenditure)

German visitors to Australia



German visitors to Queensland



German visitors to Australia

German visitation to Australia declined 2% (or by 3,000 visitors) in the year ending June 2011. Leisure visitors declined 4% as the weak economic conditions in the European Union suppressed discretionary expenditure on travel.

Around 56% of German visitors to Australia are visiting for the first time. German visitors also tend to travel to Australia unaccompanied (59%) or in and adult couple (24%). Those travelling unaccompanied declined 9%.

Around 44% of German visitors to Australia are youth⁴ visitors, with a further 44% being middle aged (30 to 59 years). While middle aged visitors increased slightly, the youth market declined 4%.

German visitors to Queensland

German visitors to Queensland declined by 5% in the year ending June 2011. This was driven by VFR (visiting friends and relatives) and holiday travel.

German visitors are most likely to visit Tropical North Queensland and Brisbane when in Queensland. Both destinations have seen declines in German visitors, by 2% and 6%, respectively.

German Market Insights⁵

Australia's share of Germany's outbound market was unchanged at 0.2% between 2000 and 2010. This market has been impacted by the European economic crisis, the Icelandic volcanic ash cloud, growing global competition between destinations and a strong Australian dollar making Australia relatively more expensive. Total air capacity between Germany and Australia is expected to remain unchanged in 2011.

Expenditure in Queensland

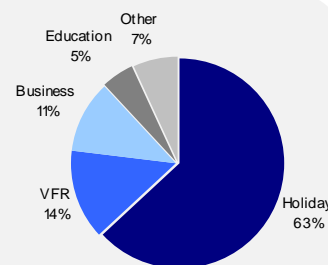
German visitors spent \$159 million on their trips to Queensland in the year ending June 2011. This was a decline of 11% on the year ending June 2010.

German visitors spent \$2,056 on their trips to Queensland. This is higher than the average spend of all international visitors to Queensland (\$1,822). Germans are now spending \$146 less per visitor than they were in the year ending June 2010.

Main purpose of visitation to Australia

The holiday and education markets drove the declines in German visitation to Australia in the year ending June 2011. Regardless, holiday remains the main reason Germans travel to Australia.

There was strong growth in business and employment travel, while VFR remained relatively stable.

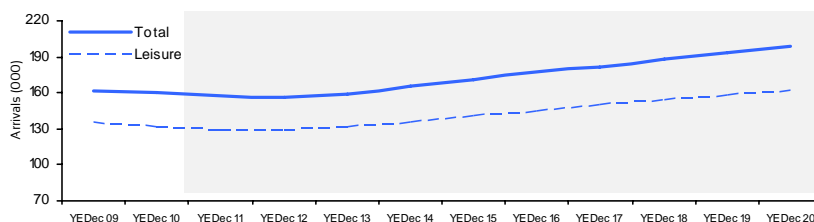


German arrivals forecast⁶

German arrivals to Australia are forecast to increase by 2.2% per annum between 2010 and 2020 to reach 199,000 arrivals.

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).

Forecast German 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. Youth market represents visitors who are aged between 15 and 29 years old.
5. Tourism Australia's German Market Profile 2011
6. Tourism Forecasting Committee 2011 Issue 2

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2011

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