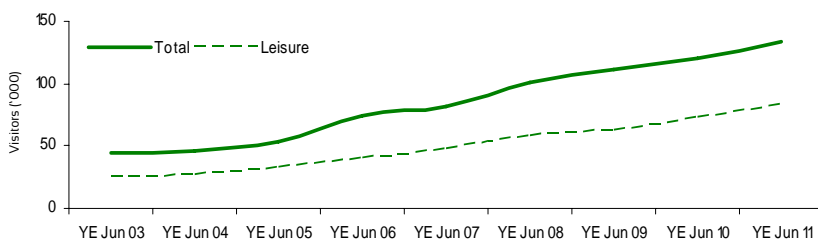


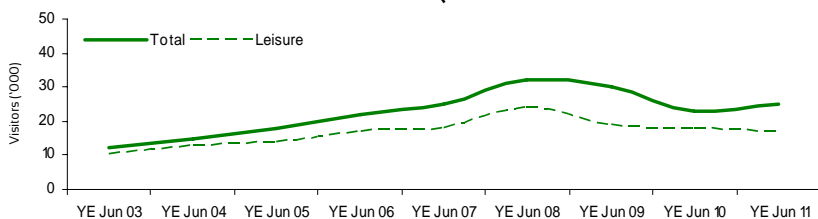
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	134,000	▲ 12%	2%	25,000	▲ 9%	1%
Total ALOS ¹ (nights)	68.7	▲ 6.1		32.0	▼ -8.6	
Leisure² visitors	83,000	▲ 14%	2%	17,000	▼ -6%	1%
Leisure ALOS	45.5	▲ 8.3		16.1	▼ -3.4	
Expenditure (\$m)³	\$677	▲ 21%	4% (share of expenditure)	\$59	▼ -8%	2% (share of expenditure)

Indian visitors to Australia



Indian visitors to Queensland



Indian visitors to Australia

Indian visitation to Australia increased by 12%, to reach 134,000 visitors in the year ended June 2011, an outcome of robust economic growth and consumer confidence boosting outbound travel.

The majority of Indians to Australia are not on a group tour (96%) or package tour (93%). Almost 60% travel to Australia unaccompanied and 56% are on a return visit, a segment of traveller which has seen rapid growth (up 29% or 17,000 visitors).

Indians are more likely to be male (55%), stay in the home of a friend or relative (51%) and be aged between 15 and 29 years (33%).

Indian visitors to Queensland

Indian visitation to Queensland increased in the year ending June 2011, driven by growth in business travel. VFR travel was softer during the period and holiday was relatively stable.

Indian visitors were most likely to visit Brisbane and the Gold Coast when in Queensland. While visitation to Brisbane increased (up 25%), the Gold Coast had stable visitation from India. This was most likely due to Brisbane being Queensland's business hub, while the Gold Coast tends to be more a holiday destination.

India Market Insights

Australia's share of India's total outbound market increased from 0.9% in 2000 to 1.1% in 2010. Despite India being one of Australia's fastest growing source markets, there are no direct flights between India and Australia. Furthermore, Indian consumers perceptions of Australia have been impacted by concerns surrounding Indian student safety in Australia.

Expenditure in Queensland

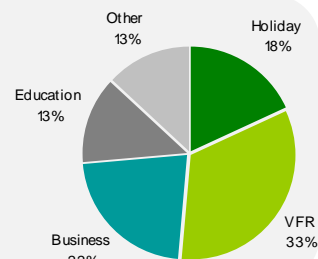
Indian visitors spent \$59 million on their trips to Queensland in the year ended June 2011, a decrease of 8% on the previous year.

Indian visitors spent an average of \$2,346 per visitor or \$73 per night in Queensland. This is higher on a per visitor basis than the average spend of all international visitors to Queensland (\$1,822).

Main purpose of visitation to Australia

The largest purpose of visit segment from India was VFR. Indian visitors are far less likely to travel to Australia for a holiday (18%) than the average international visitor (45%).

The increase in Indian visitation to Australia was driven by an increase in business and VFR (visiting friends or relatives) visitors. Holiday also increased, however education declined.

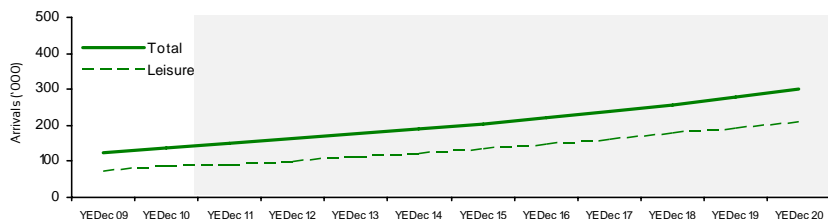


Indian arrivals forecast⁴

Indian arrivals to Australia are forecast to increase by an average of 8% each year between 2010 and 2020 to reach 300,000 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 Indian 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 Australia's India Market Profile 2011
5. 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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