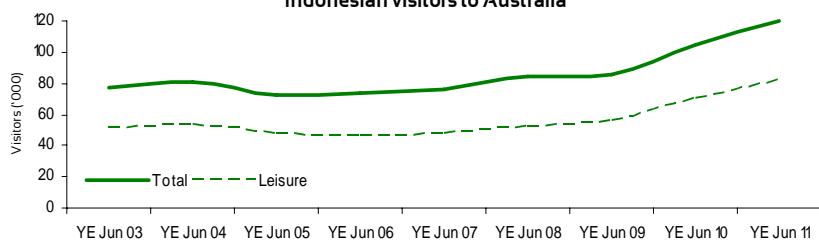


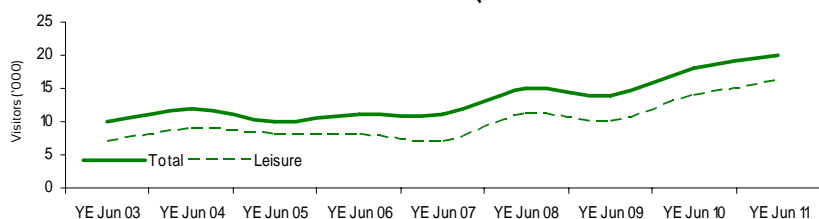
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	120,000	▲ 14%	2%	20,000	▲ 11%	1%
Total ALOS ¹ (nights)	42.3	▲ 0.1		17.8	▲ 4.0	
Leisure² visitors	82,000	▲ 17%	2%	16,000	▲ 14%	1%
Leisure ALOS	19.0	▼ -1.2		12.2	▲ 6.0	
Expenditure (\$m)³	\$512	▲ 13%	3% (share of expenditure)	\$33	▲ 8% (3 year trend change)	1% (share of expenditure)

Indonesian visitors to Australia



Indonesian visitors to Queensland



Indonesian visitors to Australia

The Indonesian market to Australia is an emerging market that has been recording relatively strong growth (up 14%).

Most Indonesian visitors to Australia are repeat visitors (75%) and this increased 15% in the year ending June 2011.

There has been growth in free and independent travel by Indonesians, with those not on a group tour increasing their travel to Australia by 13% (or 12,000 visitors).

The majority of Indonesians travel to Australia unaccompanied (53%), however this has been declining (down 3%).

Indonesian visitors to Queensland

The number of Indonesian visitors to Queensland increased in the year ending June 2011, with strong growth in VFR offsetting the declines in business. Holiday visitation also increased by 8%.

Indonesians were most likely to visit Brisbane and the Gold Coast when in Queensland. While Brisbane recorded increases in Indonesian visitors (up 44%), the Gold Coast had declines (down 10%).

Indonesian Market Insights⁴

Australia's share of Indonesia's total outbound market decreased from 3.5% in 2000 to 2.1% in 2010. Increased competition amongst international destinations and a strong Australian dollar has reduced Australia's market share. However, Indonesia's economy is growing rapidly with consumer and business confidence remaining strong and air capacity between Indonesia and Australia is expanding.

Expenditure in Queensland

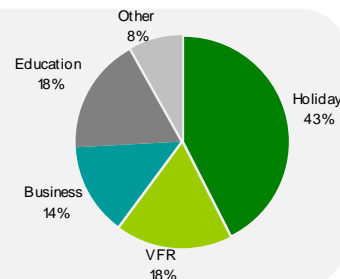
Indonesian visitors spent \$33 million on their trips to Queensland in the year ending June 2011, an increase of 8% over the three years ending June 2011.

Indonesians spend \$1,681 per visitor and \$95 per night on their trips in Queensland. This is lower than the average per visitor spend of all international visitors to Queensland (\$1,822 per visitor).

Main purpose of visitation to Australia

Indonesian visitors increased their travel to Australia across all major purpose of visit categories.

Indonesians are less likely to travel to Australia for holiday, VFR and business and are more likely to visit for education than the average international visitor.

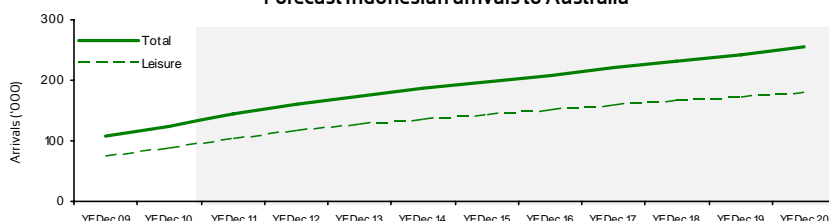


Indonesian arrivals forecast⁵

Indonesian arrivals to Australia are forecast to increase by an average of 7.5% each year between 2010 and 2011 to reach 256,000 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 Indonesian arrivals to Australia



Note: Numbers shaded are forecasts.

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

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 Indonesian Market Profile 2011
5. Tourism Forecasting Committee 2011 Issue 2

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