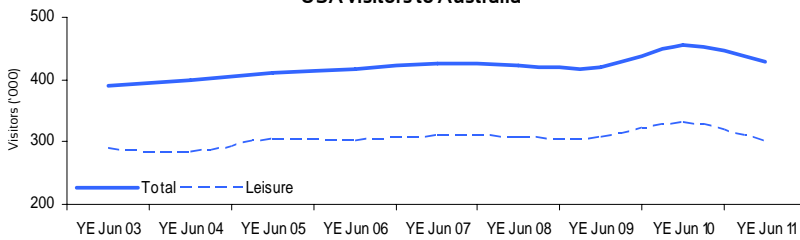


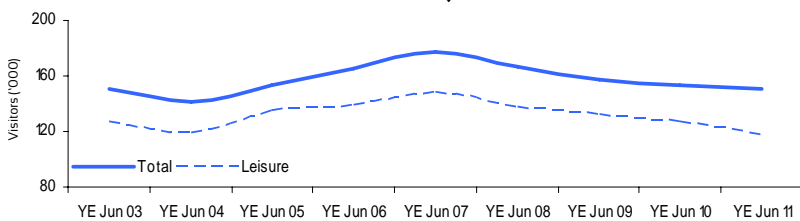
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	430,000	▼ -5%	8%	151,000	▼ -2%	8%
Total ALOS (nights) ¹	22.6	▲ 0.5		12.8	▼ -1.3	
Leisure² visitors	301,000	▼ -9%	7%	117,000	▼ -8%	7%
Leisure ALOS	18.1	▲ 0.7		11.0	▲ 1.0	
Expenditure (\$m)³	\$1,196	▼ -4%	7% (share of expenditure)	\$227	▼ -18%	6% (share of expenditure)

USA visitors to Australia



USA visitors to Queensland



USA visitors to Australia

The United States (US) is Australia's fourth largest international market, representing 8% of all international visitors to Australia. Visitation declined by 5% over the year ended June 2011.

The US market has been subdued due to a weak US economy. In addition, increasing outbound travel by Australian's to the US has hampered seat availability on flights for US visitors.

Over half (54%) of US visitors to Australia were first time visitors, and this market declined by 4% over the year ended June 2011.

The majority of US visitors travelled unaccompanied (61%) or as a adult couple (19%).

USA visitors to Queensland

The US was Queensland's fifth largest international market in the year ended June 2011, and declined by 2% over the year.

The top two most visited Queensland destinations by US visitors were Tropical North Queensland (TNQ) and Brisbane, with 51% and 38% of US visitors to Queensland stopping over in these destinations. However, they tend to stay in Brisbane for longer, due to the destinations education, employment and VFR (visiting friends and relatives) opportunities.

USA market insights⁴

Australia's share of outbound US travellers has remained steady between 2000 and 2010 at 0.8%. The low airfares and extra aviation capacity drove growth in 2009, however 2010 saw rising airfares on the US-Australia route leading to declines from the previous year and eroded Australia's competitiveness in the US market. The strong Australian dollar has reduced US travellers expenditure and dispersal in Australia. Despite this, aviation capacity is expected to grow on the US-Australia route.

Expenditure in Queensland

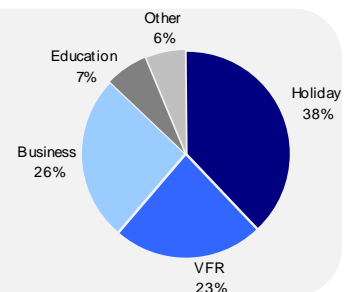
US visitors spent \$227 million on their trips to Queensland in the year ending June 2011. This was a decline of 18% on the previous year.

US spend per visitor in Queensland was \$1,502. This is lower than the average spend of all international visitors to Queensland (\$1,822). US visitors are now spending \$308 less per visitor than they were in the year ending June 2010.

Main purpose of visitation to Australia

The US holiday and VFR (visiting friends or relatives) markets reduced their visitation to Australia over the year to June 2011 (down 12% and 5% respectively).

The US business market to Australia is bouncing back, with an increase of 5% over the year to June 2011.

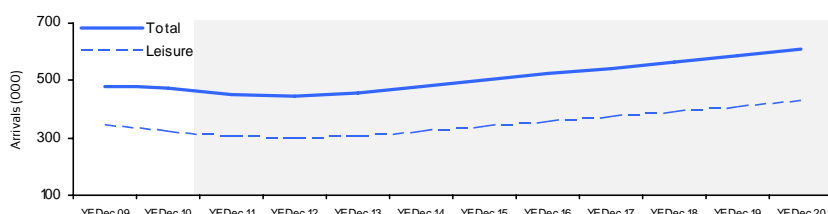


USA arrivals forecast⁵

USA arrivals to Australia are forecast to increase by an average of 2.6% between 2010 and 2020 to reach 612,000 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 USA 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 United States 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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