

# Market Snapshot

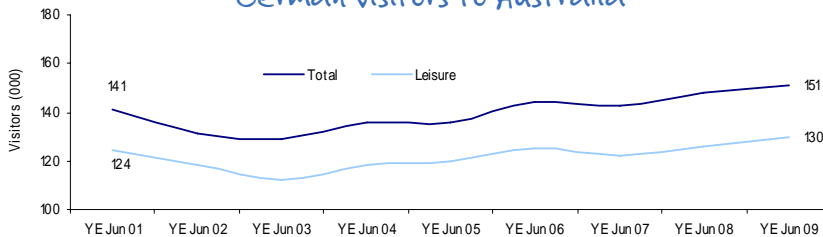
Year ended June 2009

## Germany



	Australia	Change Jun 08 to Jun 09	Share of international visitors	Queensland	Change Jun 08 to Jun 09	Share of visitors to Qld
<b>Total visitors</b>	151,000	2% ▲	3%	80,000	8% ▲	4%
Total ALOS (nights) <sup>1</sup>	49.3	3.9 ▲		28.1	3.1 ▲	
<b>Leisure<sup>2</sup> visitors</b>	130,000	3% ▲	3%	74,000	7% ▲	4%
Leisure ALOS	40.2	0.2 ▲		22.6	1.2 ▲	
<b>Expenditure (\$m)<sup>3</sup></b>	625	4% ▲	4% (Share of expenditure)	181	21% ▲	5% (Share of expenditure)

### German visitors to Australia



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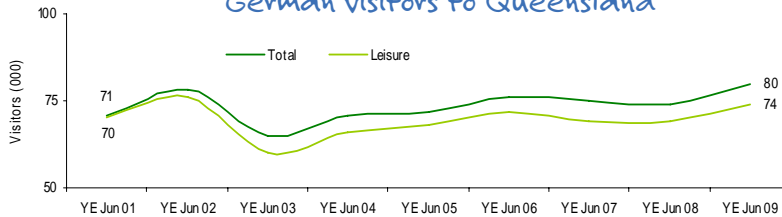
German visitors to Australia have been steadily increasing since the year ending June 2003. Further they were seemingly unaffected in the year ended June 2009 by the economic downturn.

The majority of visitors from Germany were first time visitors to Australia (60%), only 40% were repeat visitors. First time and repeat visitors from Germany increased 1% and 3% over the year to June 2009, respectively.

The majority of German visitors travelled unaccompanied (60%), and 23% travelled as an adult couple.

36% of German visitors to Australia were backpackers<sup>4</sup>. This market increased by 4% over the year to June 2009.

### German visitors to Queensland



### German visitors to Queensland

German visitors to Queensland increased in the year ended June 2009. This was driven by an increase in the holiday market (up 6%).

Tropical North Queensland (TNQ) and Brisbane were the State's most popular regions for German visitors (64% and 58%, respectively).

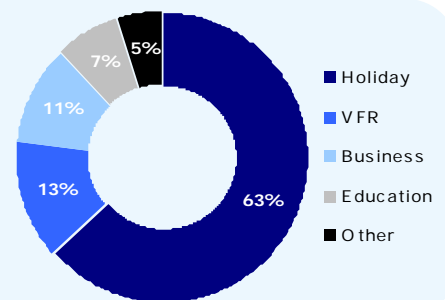
German visitors spent \$181 million on their trip to Queensland in the year to June 2009. This was an increase of 21% on the same period last year.

German visitor spend per visitor in Queensland was \$2,273. This is higher than the total international average spend (\$1,986).

### Main purpose of visitation to Australia

The holiday market accounted for over 60% of German visitors to Australia, and remained stable over the year to June 2009. German VFR visitation also remained stable.

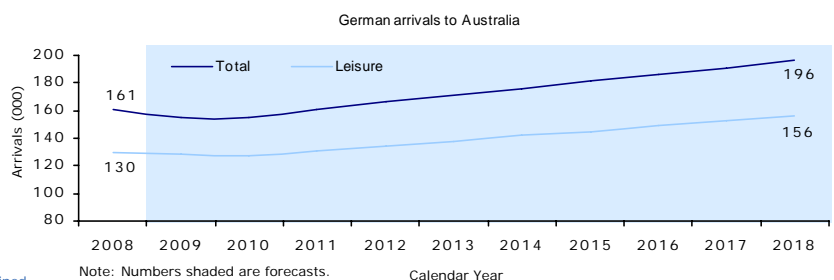
The total proportion of education visitors from Germany (7%), was similar to that of the total international market average (8%). Education visitors from Germany increased by 10% over the year to June 2009.



### German arrivals forecast<sup>5</sup>

In 2007 there were 87 million German resident departures, a 2% increase on 2006. Australia's share of this market remained 0.2%.

German arrivals to Australia are forecast to increase by an average of 2% each year from 2008 to reach 196,000 arrivals in 2018.



1. Average length of stay  
 2. Leisure is holiday and visiting friends and relatives (VFR) combined  
 3. Expenditure data is sourced from Tourism Research Australia and is inclusive of package expenditure  
 4. Backpackers are classified as visitors who spent at least one night in a backpacker or hostel  
 5. Tourism Forecasting Committee 2009 Issue 1

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2009