

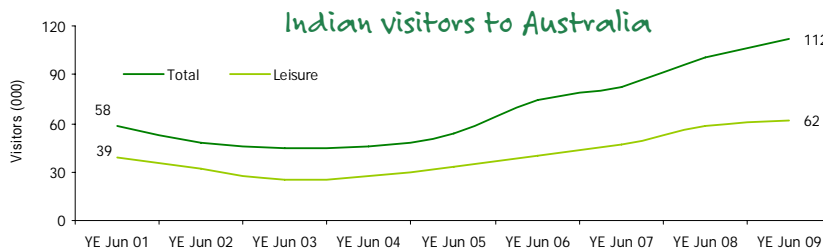
# Market Snapshot

Year ended June 2009



## India

	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>	112,000	11% ▲	2%	30,000	-6% ▼	1%
Total ALOS <sup>1</sup> (nights)	63.7	5.8 ▲		37.0	8.4 ▲	
<b>Leisure<sup>2</sup> visitors</b>	62,000	7% ▲	2%	19,000	-21% ▼	1%
Leisure ALOS	34.6	0.1 ▲		15.0	-1.0 ▼	
<b>Expenditure (\$m)<sup>3</sup></b>	567	17% ▲	3% (share of expenditure)	88	10% ▲	2% (share of expenditure)

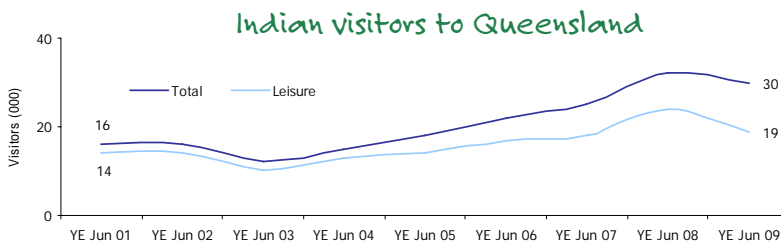


### Indian visitors to Australia

Since the year ended June 2003, Indian visitors to Australia have continued to grow, reaching 112,000 visitors in the year ended June 2009.

The majority of visitors from India were first time visitors (58%). Both the first time and repeat markets increased over the year to June 2009 (up 8% and 15% respectively).

A growing number of Indian visitors are travelling unaccompanied (66%), while 18% travelled as part of an adult couple.



### Indian visitors to Queensland

Indian visitors to Queensland declined in the year ended June 2009 driven by a decline in the holiday market (down 25%).

70% of Indian visitors to Queensland were on their first trip to Australia, 13% less than in the year ended June 2008.

Brisbane was the State's most popular region for Indian visitors (50%), increasing 36% over the year to June 2009. In contrast, the Gold Coast and Tropical North Queensland saw a decline in Indian visitors.

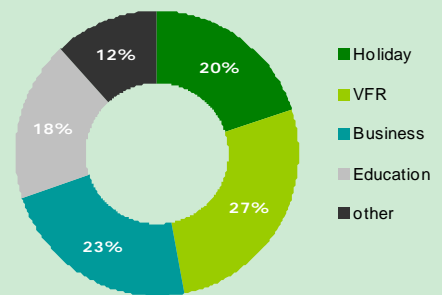
Indian visitors spent \$88 million on their trip to Queensland in the year ended June 2009.

Indian spend per visitor in Queensland was \$2,959, significantly higher than the total international average spend (\$1,986).

### Main purpose of visitation to Australia

There was an increase in Indian visitation to Australia in the year ended June 2009. This was driven by increases in the visiting friends or relatives (VFR) and education markets (up 30% and 43%, respectively)

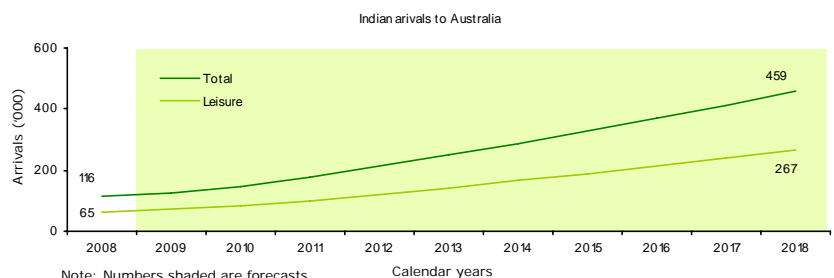
Indian VFR visitors (55.5 nights) had a longer average length of stay than holiday visitors (14.7 nights). The Indian education market is proportionally a much larger market (representing 18% of Indian visitors, whereas on average education visitors represent 8% of international visitors).



### Indian arrivals forecast<sup>4</sup>

India arrivals to Australia are forecast to increase by an average of 15% each year from 2008 to reach 459,000 arrivals in 2018.

Key market segments for Indian travel to Australia such as honeymoon and 'visiting friends or relatives' travel are still looking positive.



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 Forecasting Committee 2009 Issue 1

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