

Market Snapshot

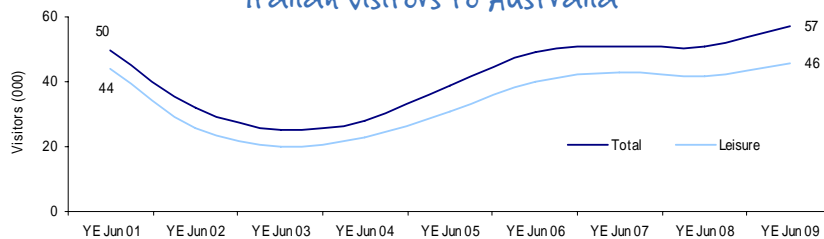
Year ended June 2009



Italy

	Australia	Change Jun 08 to Jun 09	Share of international visitors	Queensland	Change Jun 08 to Jun 09	Share of visitors to Qld
Total visitors	57,000	12% ▲	1%	27,000	17% ▲	1%
Total ALOS (nights) ¹	48.8	9.5 ▲		21.3	-0.7 ▼	
Leisure² visitors	46,000	10% ▲	1%	24,000	14% ▲	1%
Leisure ALOS	40.5	6.0 ▲		16.7	-1.3 ▼	
Expenditure (\$m)³	244	23% ▲	1% (Share of expenditure)	50	14% ▲	1% (Share of expenditure)

Italian visitors to Australia



Italians visiting Australia

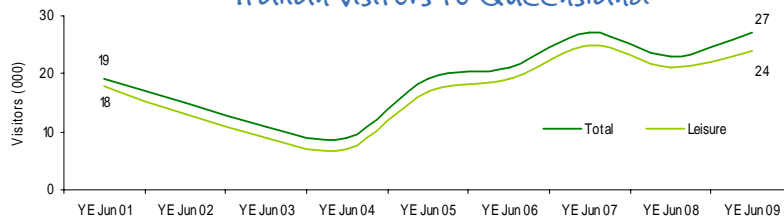
Since the year ended June 2003 Italian visitor numbers to Australia have grown steadily. There was an increase of 12% in Italian visitors to Australia, driven by an increase in the business market in the year ended June 2009.

The majority of visitors from Italy to Australia were first time visitors (65%), they increased their visitation by 16% over the year to June 2009.

Almost half of visitors from Italy travelled unaccompanied (49%), while 32% travelled as part of an adult couple.

23% of Italian visitors to Australia were backpackers⁴. This market increased by 18% over the year to June 2009.

Italian visitors to Queensland



Italians visiting Queensland

Italian visitors to Queensland increased over the year to June 2009, driven by an increase in the holiday market (up 16%).

Tropical North Queensland (TNQ) and Brisbane were the State's most visited regions for Italian visitors (56% and 48% made a stopover respectively). Italian visitors to Brisbane and TNQ increased by 30% and 7%, respectively over the year to June 2009.

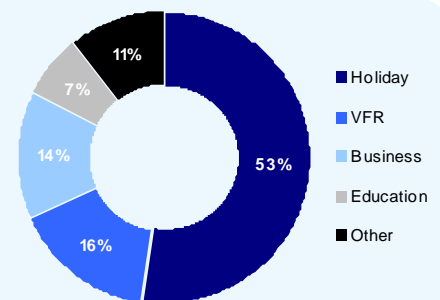
Italians spent \$50 million on their trip to Queensland in the year to June 2009. This was an increase of 14% on the same period last year.

Italian spend per visitor while in Queensland was \$1,859, lower than the total international average spend (\$1,986).

Main purpose of visitation to Australia

The holiday market accounted for just over half of Italian visitors to Australia. This market increased by 3% over this period, and contributed to the growth in total visitors. Their average length of stay was 45.9 nights.

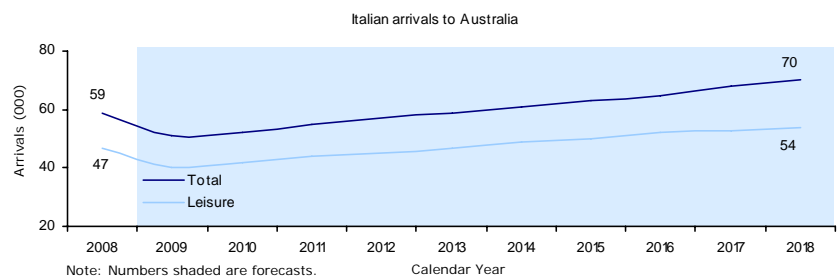
Visiting friends or relatives (VFR) visitors remained steady over the period.



Italian arrivals forecast⁵

In 2008 visitor arrivals from Italy was boosted by the large Italian attendance at Sydney's World Youth Day event, however continued poor economic performance in 2009 will affect the forecast 14% fall in arrivals.

Italian arrivals to Australia are forecast to increase by an average of 2% each year from 2008 to reach 70,000 arrivals in 2018.



Note: Numbers shaded are forecasts.

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

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