

Market Snapshot

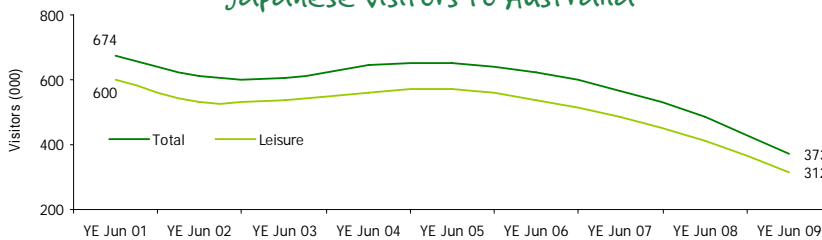
Year ended June 2009

Japan



	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	373,000	-23% ▼	7%	238,000	-24% ▼	12%
Total ALOS ¹ (nights)	21.5	1.4 ▲		12.0	0.9 ▲	
Leisure² visitors	312,000	-24% ▼	8%	216,000	-25% ▼	12%
Leisure ALOS	15.3	1.5 ▲		8.5	0.6 ▲	
Expenditure (\$m)³	966	-6% ▼	6% (share of expenditure)	448	-3% ▼	11% (share of expenditure)

Japanese visitors to Australia



Japanese visitors to Queensland

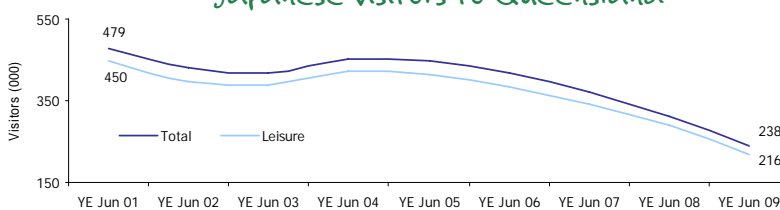
Japan is Australia's fourth international market, however the Global Financial Crisis (GFC) and Swine flu concerns accelerated this decline in the year ended June 2009. Japanese visitors to Australia have declined since the year ended June 2004.

Over half of the Japanese visitors to Australia were first time visitors (58%).

Almost one third (33%) of visitors from Japan travelled unaccompanied, while 25% travelled as an adult couple.

Most Japanese visitors to Australia travelled on a package (58%). This market has declined by 30% over the year to June 2009.

Japanese visitors to Queensland



Japanese visitors to Queensland

Japan is Queensland's third largest international market, and declined over the year ending June 2009.

Queensland's most popular regions visited by Japanese visitors were TNQ and the Gold Coast (53% and 47% respectively). Japanese visitors to TNQ and the Gold Coast declined over the year to June 2009 (down 33% and 10% respectively).

Japanese spent \$448 million on their trip to Queensland in the year to June 2009. This was a decline of 3% on the previous year.

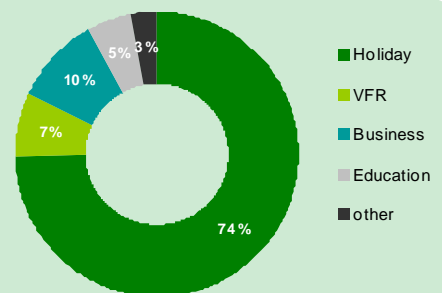
Japanese spend per visitor in Queensland was \$1,885, lower than the total international average spend (\$1,986).

Main purpose of visitation to Australia

The decrease in the number of Japanese visitors to Australia was driven by declines in the holiday market in the year to June 2009.

The holiday market accounted for over three quarters of all Japanese visitors to Australia, and declined by 26% over this period. This was impacted by Swine flu concerns in the June quarter 2009.

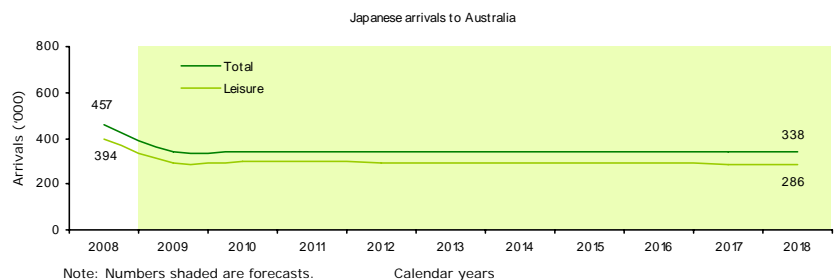
The business and visiting friends or relatives (VFR) market, also declined by 12% and 7%, respectively.



Japanese arrivals forecast⁴

In 2008, there were 15.9 million outbound departures from Japan, down 8% from 2007. Australia's share of this market fell to 2.9% in 2008 from 3.3% in 2007.

Japanese arrivals to Australia are forecast to decline by an average of 3% each year from 2008 to reach 338,000 arrivals in 2018.



Note: Numbers shaded are forecasts.

Calendar years

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