

Market Snapshot

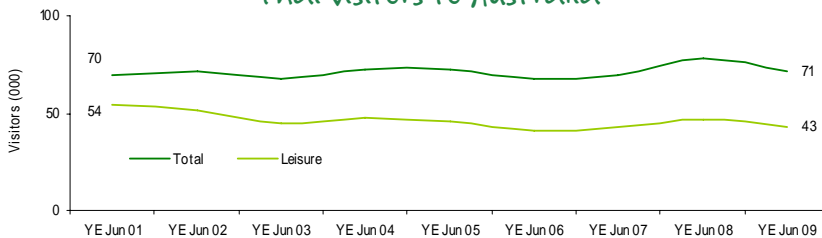
Year ended June 2009

Thailand



	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	71,000	-9% ▼	1%	8,000	-27% ▼	0%
Total ALOS ¹ (nights)	52.7	10.8 ▲		29.6	0.4 ▲	
Leisure² visitors	43,000	-9% ▼	1%	6,000	-14% ▼	0%
Leisure ALOS	23.9	1.0 ▲		18.5	-3.0 ▼	
Expenditure (\$m)³	351	15% ▲	2% (Share of expenditure)	18	-28% ▼	0%

Thai visitors to Australia



Thai visitors to Australia

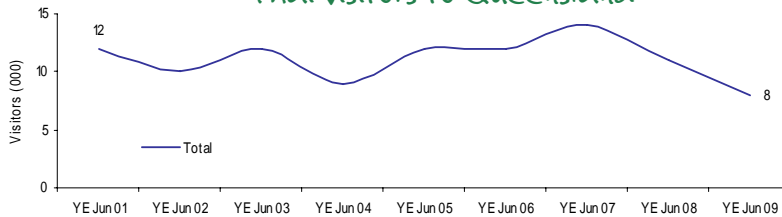
Thailand is one of Australia's smaller source markets. This market has had relatively little change in visitor numbers for the last eight years, although declined slightly over the last year.

Over half of Thai visitors to Australia were repeat visitors (61%), down 9% on last year.

Almost two thirds (68%) of Thai visitors travelled unaccompanied, while 14% travelled as part of an adult couple.

The vast majority of Thai visitors to Australia do not travel on a package (94%). However this market declined by 4% over the year to June 2009.

Thai visitors to Queensland



Thai visitors to Queensland

The number of Thai visitors to Queensland has been declining since the year ended June 2007 and declined by 27% over the year to June 2009.

Repeat visitors (to Australia) accounted for 63% of the Thai market to Queensland, this is 17% fewer than the year ended June 2008.

Brisbane was Queensland's most visited region for Thai visitors (62%), although declined by 17% over the year to June 2009.

Thai visitors spent \$18 million on their trip to Queensland in the year to June 2009. This was a decline of 28% on the previous year.

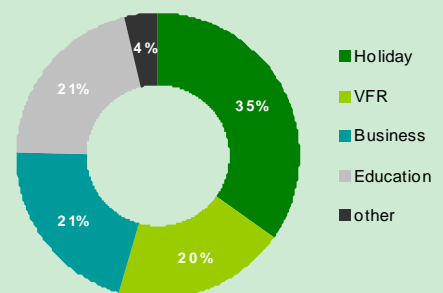
Thai spend per visitor in Queensland was \$2,214, higher than the total international average spend (\$1,986).

Main purpose of visitation to Australia

There was a 9% decrease in visitors from Thailand in the year ended June 2009. This was largely driven by declines in the holiday and business markets (down 14% and 21%, respectively).

Thai holiday visitor nights also declined (down 9%) over this period. Thai holiday visitors average length of stay was 24.6 nights.

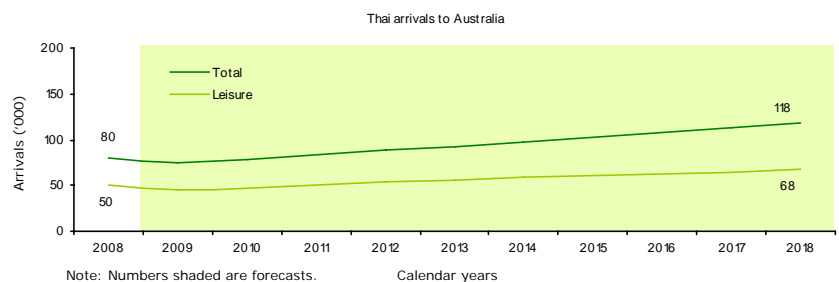
Thai education visitors increased (up 7%) as did education visitor nights (up 27%) over the year to June 2009. This market's average length of stay was 161.4 nights and this influenced the overall Thai visitor length of stay (52.7 nights).



Thai arrivals forecast⁴

Thai arrivals to Australia are forecast to increase by an average of 4% each year from 2008 to reach 118,000 arrivals in 2018.

Political instability in Thailand over October to December 2008 reduced outbound tourism flows. International tourism was most disrupted in early December when international airports in Bangkok were closed for eight days.



Note: Numbers shaded are forecasts.

- Average length of stay
- Leisure is holiday and visiting friends or relatives (VFR) combined
- Expenditure data is sourced from Tourism Research Australia and is inclusive of package expenditure
- Tourism Forecasting Committee 2009 Issue 1

n/p Thai visitor leisure trend data for Queensland is not published due to low sample size

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