

Market Snapshot

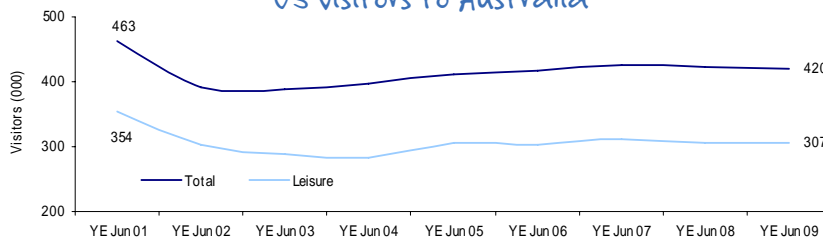
Year ended June 2009



United States (US)

	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	420,000	-1% ▼	8%	157,000	-6% ▼	8%
Total ALOS (nights) ¹	21.9	-0.5 ▼		13.5	2.6 ▲	
Leisure² visitors	307,000	0%	8%	132,000	-4% ▼	7%
Leisure ALOS	17.0	0.7 ▲		9.5	1.7 ▲	
Expenditure (\$m)³	1,236	-7% ▼	7% (Share of expenditure)	292	7% ▲	7% (Share of expenditure)

US visitors to Australia



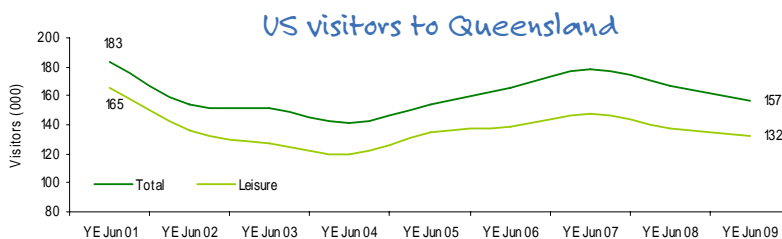
US visitors to Queensland

The US is Australia's third largest international market. It declined over the year ended June 2009 by 1%, influenced by the Global Financial Crisis (GFC).

The majority of visitors from the US were first time visitors to Australia (57%).

Over half of US visitors to Australia travelled unaccompanied (61%), while 22% travelled as an adult couple.

11% of US visitors to Australia were backpackers⁴. This market declined by 2% over the year to June 2009.



US visitors to Queensland

The US was Queensland's fourth largest international market in the year ended June 2009, and declined over the year with the economic downturn a key contributor.

Tropical North Queensland (TNQ) and Brisbane were the State's most popular regions for US visitors (55% and 40%, respectively). US visitors to TNQ and Brisbane declined over the year to June 2009 (down 11% and 2% respectively).

US visitors spent \$292 million on their trip to Queensland in the year to June 2009. This was an increase of 7% on the previous year.

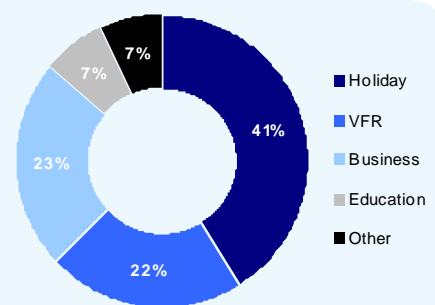
US visitor spend per visitor in Queensland was \$1,861, lower than the total international average spend (\$1,986).

Main purpose of visitation to Australia

The decline in the US business market (down 13% and 14,000 visitors) contributed to the downturn in the total number of US visitors over the year to June 2009.

The percentage of US visitors travelling to Australia for business was higher than the total international business market (23% compared to 16%).

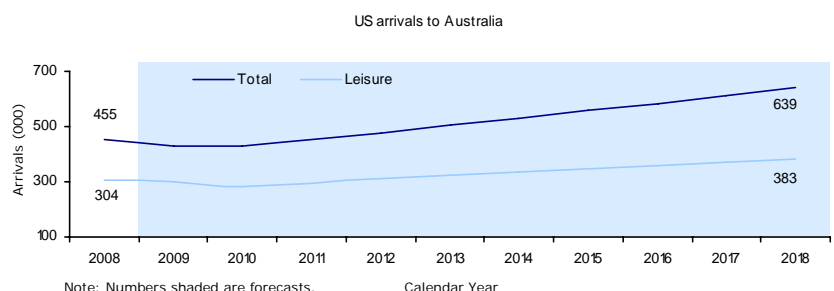
The US visiting friends or relatives (VFR) visitors increased by 13% over the year to June 2009. Their average length of stay was 19.9 nights. The VFR market is proving to be more resilient to the economic downturn.



US arrivals forecast⁵

In 2008, there were 40.4 million outbound departures from the US, down 1% on the same period in 2007. Australia's share of this market remained stable at 1.1%.

US arrivals to Australia are forecast to increase by an average of 3% each year from 2008 to reach 639,000 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