

Overseas Arrivals and Australian Departures Snapshot

Year Ended March 2010



Overseas Arrivals

	Country/Region	Arrivals (Australia)	Annual % change ²	Share
	New Zealand	1,116,000	0%	20%
	United Kingdom	663,000	3%	12%
	USA	483,000	11%	9%
	China	376,000	2%	7%
	Japan	357,000	-16%	6%
	Singapore	291,000	8%	5%
	Malaysia	216,000	21%	4%
	Korea	188,000	-7%	3%
	Germany	163,000	3%	3%
	Hong Kong	158,000	11%	3%
	India	128,000	7%	2%
	Canada	123,000	2%	2%
	Indonesia	114,000	24%	2%
	Middle East & North Africa ⁴	110,000	7%	2%
	France	97,000	12%	2%
	Taiwan	97,000	16%	2%
	TOTAL	5,657,000	3%	100%

	Arrivals (Queensland ³)	Annual % change	Share
	430,000	-2%	30%
	120,000	1%	8%
	92,000	12%	6%
	65,000	2%	5%
	201,000	-16%	14%
	49,000	-2%	3%
	36,000	-5%	3%
	40,000	-11%	3%
	30,000	10%	2%
	27,000	11%	2%
	19,000	3%	1%
	27,000	7%	2%
	12,000	9%	1%
	21,000	-3%	1%
	16,000	18%	1%
	37,000	1%	3%
	1,438,000	-1%	100%

How have international arrivals into Australia and Queensland changed?

International Visitor Arrivals to Australia

- International tourism is gaining momentum, with improvements in business and consumer confidence and a positive economic outlook stimulating the upward trend in arrivals seen in the first quarter of 2010.
- A return to growth from Australia's top ten international markets in the March quarter drove the nation's 3% increase in arrivals for the year ended March 2010 results.
- Arrivals from the USA for the year ended March 2010 were the highest recorded since its peak in August 2001, a positive result triggered by an increase in air capacity.
- The increase in arrivals from Malaysia, Indonesia, and Singapore over the year off-set the decline in arrivals from Japan and Korea, where the preference for intra Asia travel continues to appeal more to these key markets.
- Arrivals from New Zealand recovered in the March quarter due to increased air capacity and a return in consumer confidence.

International Visitor Arrivals to Queensland

- Queensland witnessed a marginal decline in international arrivals (down -1%) for the year ended March 2010, however recorded a more favourable 4% increase in the March quarter.
- In contrast to the nation, Queensland recorded stronger growth from France, Germany and the USA in year the ended March 2010.
- Whilst Queensland saw a decline in arrivals from Malaysia and Singapore, Victoria saw healthy growth with air capacity playing a key role.
- International arrivals to Queensland from the United Kingdom returned over the year to March 2010 (up 1%).
- The decline from Japan eased for Queensland (and the nation) in the first quarter of 2010, with Cairns and the Gold Coast airports welcoming the reinstatement of air capacity and perhaps some pent up demand supporting the upswing.

Overseas Arrivals and Australian Departures Snapshot

Year Ended March 2010



Australian Resident Departures⁵

	Destination	Australian resident departures	Annual % change	Share
	New Zealand	1,058,000	15%	16%
	USA	602,000	26%	9%
	Indonesia	595,000	49%	9%
	United Kingdom	443,000	9%	7%
	Thailand	421,000	7%	6%
	China	292,000	7%	4%
	Fiji	265,000	19%	4%
	Malaysia	237,000	22%	4%
	Singapore	234,000	8%	4%
	Hong Kong	210,000	1%	3%
	Middle East & North Africa	204,000	17%	3%
	Vietnam	166,000	1%	3%
	Japan	156,000	7%	2%
	India	156,000	16%	2%
	Philippines	121,000	16%	2%
	Italy	112,000	-5%	2%
	TOTAL	6,523,000	14%	100%

How have resident departures from Australia and Queensland changed?

Australian Resident Departures

- Outbound departures continued to rise (up 14%), as Australians take advantage of the favourable exchange rate, affordable airfares, and growth in air capacity.
- The USA was one destination to benefit from enhanced air capacity, recording a significant increase in Australian resident departures in the year to March 2010.
- Indonesia, Malaysia, Thailand, and Fiji remain the favoured short haul destinations for Australian residents as they take advantage of comparably priced packaged deals and flights offered by these regions.
- A record number of Australians travelled to New Zealand over the year to March 2010.
- Whilst the Australian dollar remains strong and domestic consumers continue their international travel (forecast to grow at 4.1% for year ended 2010), this may positively encourage and support long term retention of air and seat capacity for Australia's key international source markets.

Queensland Resident Departures

- Queensland's growth in resident departures was more marginal (up 10%) than that seen by the nation (up 14%).
- New Zealand, the USA, United Kingdom, Thailand and Fiji were the preferred international destinations for Queenslanders traveling outbound over the year.
- Short haul destinations such as Indonesia, Fiji and Thailand continue to benefit from the favourable exchange rate and comparably priced package deals to attract an increased number of Queensland visitors.
- Long haul destinations such as Europe and the USA, are also continuing to see strong growth from Queensland visitors.
- The resurgence in travel to long haul destinations was supported by growing confidence amongst Australians.

	Queensland resident departures	Annual % change	Share
	290,000	11%	25%
	104,000	27%	9%
	53,000	35%	5%
	77,000	12%	7%
	65,000	6%	6%
	32,000	1%	3%
	56,000	12%	5%
	26,000	6%	2%
	26,000	12%	2%
	29,000	6%	3%
	21,000	1%	2%
	22,000	2%	2%
	38,000	7%	3%
	15,000	15%	1%
	22,000	8%	2%
	14,000	-12%	1%
	1,139,000	10%	100%

Overseas Arrivals and Australian Departures Snapshot

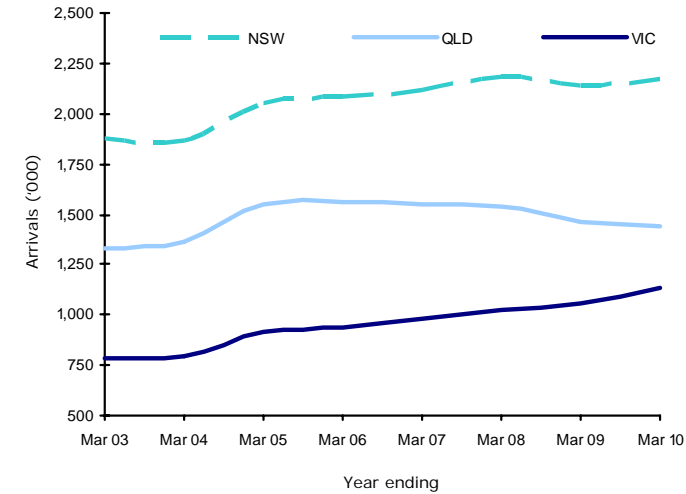
Year Ended March 2010



State Comparison of Key Source Markets

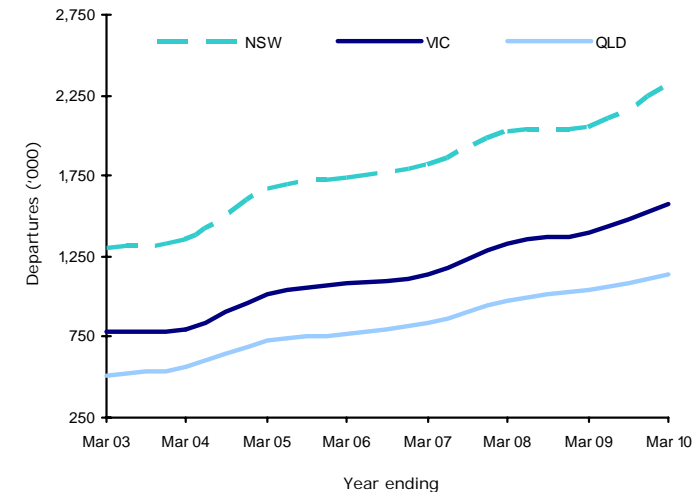
Country	ARRIVALS							
	QLD		NSW		VIC		Australia	
New Zealand	430,000	-2%	362,000	2%	226,000	2%	1,116,000	0%
United Kingdom	120,000	1%	260,000	2%	117,000	6%	663,000	3%
USA	92,000	12%	249,000	12%	88,000	8%	483,000	11%
China	65,000	2%	165,000	1%	110,000	-3%	376,000	2%
Japan	201,000	-16%	87,000	-17%	31,000	-17%	357,000	-16%
Singapore	49,000	-2%	74,000	7%	69,000	13%	291,000	8%
Total International	1,438,000	-1%	2,176,000	2%	1,135,000	7%	5,657,000	3%

How are international arrivals trending?



Destination	DEPARTURES							
	QLD		NSW		VIC		Australia	
New Zealand	290,000	11%	388,000	18%	235,000	13%	1,058,000	15%
USA	104,000	27%	252,000	25%	152,000	29%	602,000	26%
Indonesia	53,000	35%	129,000	37%	101,000	39%	595,000	49%
United Kingdom	77,000	12%	144,000	5%	99,000	10%	443,000	9%
Thailand	65,000	6%	129,000	5%	118,000	12%	421,000	7%
China	32,000	1%	134,000	7%	82,000	10%	292,000	7%
Total International	1,139,000	10%	2,309,000	12%	1,578,000	13%	6,523,000	14%

How are resident departures trending?



Overseas Arrivals and Australian Departures Snapshot

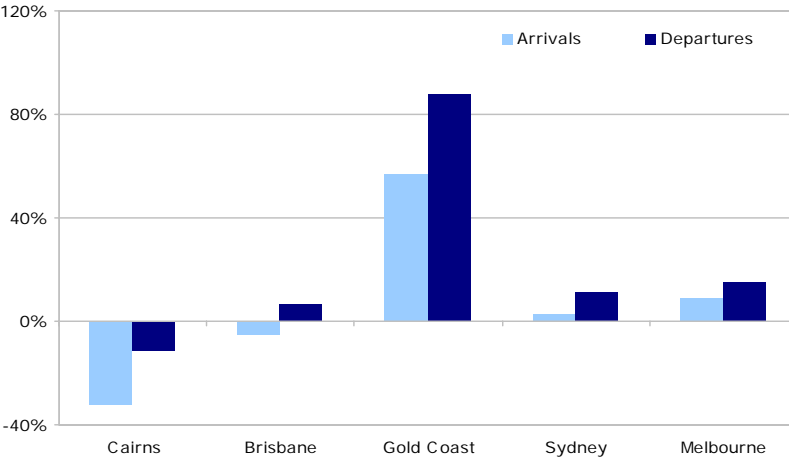
Year Ended March 2010



Comparison of overseas arrivals¹ and Australian resident departures⁵ through key airports

Year Ended March 2009 to Year Ended March 2010

Annual % Change



Cairns

- The decline in arrivals and departures seen in Cairns eased in the year end March 2010 as changes in capacity from key source markets motivated visitor arrivals and departures from the region. Cairns positively saw an increase in arrivals from Japan and China over the year.

Brisbane

- International arrivals to Brisbane were dominated by the USA and United Kingdom markets, with competitive airfares assisting growth. Similarly, the increase in Australian resident departures to the USA and United Kingdom reciprocated the arrivals growth and underpinned the increased seat capacity provided by the airlines.

Gold Coast

- The Gold Coast airport continued to outperform all other Australian ports in terms of growth, with New Zealand, Japan and Malaysian routes supporting the arrival and departures figures. Significantly, four out of five Malaysian visitors to Queensland arrived through the Gold Coast airport in the year to March 2010.

Sydney

- Sydney recorded growth in both arrivals and departures over the year to March 2010, boosted by New Zealand and USA visitors. Growth in departures however surpassed arrivals, prompted by the increase in Australian residents heading to New Zealand (up 21%) over the year.

Melbourne

- Arrival figures to Melbourne were dominated by the increase in capacity from Malaysia, United Kingdom and New Zealand, with departures growth mimicking these results as Australian residents similarly increased their travel to these destinations.

Airports - International arrivals and departures



Notes:

- Short term visitors only
- Annual change refers to the percentage change between the year ending March 2010 vrs. year ending March 2009
- Refers to visitors who nominate Queensland as their main state of stay whilst in Australia
- Middle East and North Africa includes Israel, Lebanon, or Egypt
- Australian resident departures only

Data Sources:

The Overseas Arrivals and Departures information included in this report is extracted from the Overseas Arrivals and Departures (OAD) data, published by the Australian Bureau of Statistics. OAD information is collated from passenger cards. These statistics refer to airport movements, short term visitor arrivals to Australia, or short term resident departures from Australia.

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