

Table 6. Statistical information and targeted market segments for Priority Markets - **international holiday visitors to TNQ.**

Priority Markets	Japan	UK	North America		China	
			Canada	USA	China	Hong Kong
Visitor numbers (Holiday)	200,492 (211,071)	146,090 (152,786)	24,425 (26,017)	93,367 (10-3,495)	40,890 (48,535)	14,005 (15,843)
Visitor nights (Holiday)	1,013,055 (1,119,703)	1,192,742 (1,510,237)	198,848 (228,430)	454,178 (622,296)	104,224 (141,122)	65,828 (83,207)
Average Length of Stay (Holiday)	5.3 nights	9.9 nights	8.8 nights	6.0 nights	2.9 nights	5.3 nights
TTNQ Growth Forecast 2007-2011 (AAGR) ^						
Mix of International visitors to TNQ	All Visitors: 25% Holiday Visitors: 26%	All Visitors: 18% Holiday Visitors: 17%	All Visitors: 3% Holiday Visitors: 3%	All Visitors: 12% Holiday Visitors: 10%	All Visitors: 6% Holiday Visitors: 4%	All Visitors: 2% Holiday Visitors: 2%
TNQ's share of Int'l visitors to QLD	All Visitors: 49% Holiday Visitors: 80%	All Visitors: 36% Holiday Visitors: 51%	All Visitors: 6% Holiday Visitors: 8%	All Visitors: 24% Holiday Visitors: 29%	All Visitors: 11% Holiday Visitors: 12%	All Visitors: 4% Holiday Visitors: 5%
TNQ's share of Int'l visitors to AUS	All Visitors: 21% Holiday Visitors: 45%	All Visitors: 15% Holiday Visitors: 29%	All Visitors: 3% Holiday Visitors: 5%	All Visitors: 10% Holiday Visitors: 16%	All Visitors: 5% Holiday Visitors: 7%	All Visitors: 2% Holiday Visitors: 3%
International services	Direct services from: <ul style="list-style-type: none"> <li>▪ Tokyo (twice daily)</li> <li>▪ Nagoya &amp; Osaka (5 each per week – 2 services triangulated)</li> </ul> Links via: <ul style="list-style-type: none"> <li>▪ Guam (2 services per week with CO)</li> <li>▪ HKG (3 direct services and 3 services via Brisbane weekly, by CX)</li> </ul>	Links via: <ul style="list-style-type: none"> <li>▪ Singapore, (daily via DRW) with QF/JQ</li> <li>▪ HKG – 3 direct services and 3 services via Brisbane weekly, operated by CX.</li> </ul>	Links via: <ul style="list-style-type: none"> <li>▪ Auckland with Air NZ</li> <li>▪ Auckland with QF</li> <li>▪ UA/DJ codeshare</li> <li>▪ Guam with CO (US Service Personnel)</li> <li>▪ Likely introduction of V.Australia services from SYD/BNE to US east coast</li> </ul>	<ul style="list-style-type: none"> <li>▪ Link via Hong Kong - 3 three direct services and three services via Brisbane weekly with CX</li> <li>▪ Charters at Chinese New Year with China Southern, Qantas, Viva Macau</li> </ul>		
Return on Investment (ROI)						
Domestic services & connections	Links via SYD, BNE, ASP, DRW, Hamilton.	Links via SYD, MEL, BNE, DRW	Links via SYD, MEL, BNE	Links via SYD, BNE, MEL	Links via SYD, BNE, MEL	Links via SYD, BNE, MEL
Approx. total market value to TNQ *	\$ 136,603,404	\$184,248,920	\$27,868,465	\$75,920,120	\$17,253,463	\$10,151,290
Priority market segments - Maximum focus	<ul style="list-style-type: none"> <li>▪ Self challengers</li> <li>▪ Travel in style</li> <li>▪ Cultural Explorers</li> <li>▪ First timers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Pushing boundaries</li> <li>▪ Comfort adventurers</li> <li>▪ Self challengers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Self challengers</li> <li>▪ Roots</li> </ul>		<ul style="list-style-type: none"> <li>▪ Ready to leave</li> <li>▪ Family connections</li> <li>▪ Self challengers</li> <li>▪ Sightseers</li> <li>▪ Romance</li> </ul>	
Priority market segments - Selective focus	<ul style="list-style-type: none"> <li>▪ Collectors</li> </ul>	<ul style="list-style-type: none"> <li>▪ Taste and try</li> <li>▪ Cocoon travellers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Travel in style</li> <li>▪ Home from home</li> </ul>		<ul style="list-style-type: none"> <li>▪ Collectors</li> <li>▪ Cocoon travellers</li> </ul>	

Data Source: International Visitors Survey Year September 2007 – Holiday Visitors

( ) – value in brackets is TOTAL visitors to TNQ

\* Value of market derived by multiplying modelled international visitor expenditure in region per night excluding package expenditure (TRA International Survey, YE Sept 2007) by number of nights spent in the region.

^ Growth forecasts are for ALL visitors

Table 6. (cont) Statistical information and targeted market segments for Priority Markets - international **holiday** visitors to TNQ.

Priority Markets	Europe					New Zealand	Korea
	Germany	France	Italy	Netherlands	Switzerland		
Visitor numbers (Holiday)	44,276 (45,661)	16,981 (17,499)	13,584 (14,418)	12,098 (12,641)	12,529 (13,065)	28,276 (38,113)	11,461 (14,739)
Visitor nights (Holiday)	356,595 (427,768)	139,406 (169,966)	86,537 (128,353)	121,504 (156,551)	89,513 (141,889)	329,005 (402,192)	65,828 (83,207)
Average Length of Stay (Holiday)	9.4 nights	9.7 nights	8.9 nights	12.4 nights	10.9 nights	10.6 nights	33.9 nights
TTNO Growth Forecast 2007-2011 (AAGR) ^						5.2%	2.2%
Mix of International visitors to TNQ	All Visitors: 5% Holiday Visitors: 5%	All Visitors: 2% Holiday Visitors: 5%	All Visitors: 2% Holiday Visitors: 2%	All Visitors: 2% Holiday Visitors: 1%	All Visitors: 2% Holiday Visitors: 1%	All Visitors: 5% Holiday Visitors: 4%	All Visitors: 2% Holiday Visitors: 1%
TNQ's share of Int'l visitors to QLD	All Visitors: 11% Holiday Visitors: 16%	All Visitors: 4% Holiday Visitors: 6%	All Visitors: 3% Holiday Visitors: 5%	All Visitors: 3% Holiday Visitors: 4%	All Visitors: 3% Holiday Visitors: 4%	All Visitors: 9% Holiday Visitors: 11%	All Visitors: 3% Holiday Visitors: 4%
TNQ's share of Int'l visitors to AUS	All Visitors: 4% Holiday Visitors: 9%	All Visitors: 2% Holiday Visitors: 3%	All Visitors: 1% Holiday Visitors: 3%	All Visitors: 1% Holiday Visitors: 2%	All Visitors: 1% Holiday Visitors: 2%	All Visitors: 4% Holiday Visitors: 6%	All Visitors: 2% Holiday Visitors: 2%
International services	Links via: ▪ Singapore, (daily via DRW) with QF/JQ ▪ HKG – 3 direct services and 3 services via Brisbane weekly, operated by CX.	▪	▪	▪	▪	▪ 3 direct services from AKL per week with Air NZ	Links via ▪ HKG - 3 direct services and 3 services via Brisbane weekly, operated by CX. ▪ Charter flights in July and August with Korean Airlines
Return on Investment (ROI)							
Domestic services & connections	Links via SYD, MEL, BNE, DWN, PER					Links via SYD, MEL, BNE	Links via SYD, BNE, MEL
Approx. total market value to TNQ *	\$ 52,187,756	\$20,735,829	\$15,569,095	\$19,099,162	\$17,310,469	\$49,067,404	\$60,914,221
Priority market segments - Maximum focus	▪ Pushing boundaries ▪ Self challengers ▪ Taste and try	▪	▪	▪	▪	▪ Cocoon travellers ▪ Pushing boundaries ▪ Family	▪ Close to home ▪ Family connections ▪ Taste and try ▪ Sightseers ▪ Honeymoon/Romance
Priority market segments - Selective focus	▪ Cocoon travellers ▪ Comfort and learning	▪	▪	▪	▪	▪ Home from home ▪ Close to home	▪ Travel in style ▪ Cocoon travellers

Data Source: International Visitors Survey Year September 2007 – Holiday Visitors

() – value in brackets is TOTAL visitors to TNQ

\* Value of market derived by multiplying modelled international visitor expenditure in region per night excluding package expenditure (TRA International Survey, YE Sept 2007) by number of nights spent in the region.

^ Growth forecasts are for ALL visitors