

Market Snapshot

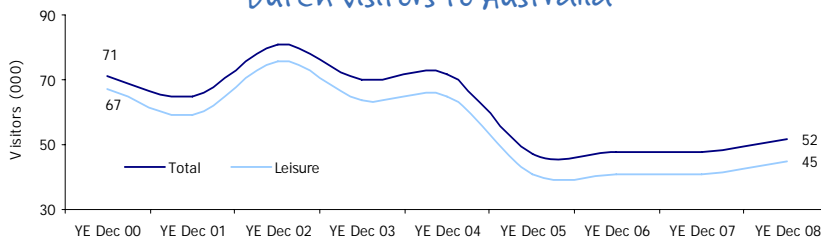
Year ended December 2008

Netherlands



	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec 08	Share of visitors to Qld
Total visitors	52,000	8% ▲	1%	26,000	30% ▲	1%
Total ALOS (nights) ¹	41.0	-5.5 ▼		23.3	-11.0 ▼	
Leisure² visitors	45,000	10% ▲	1%	24,000	20% ▲	1%
Leisure ALOS	36.0	-5.3 ▼		20.1	-6.5 ▼	
Expenditure (\$m)³	203	22% ▲	1% (Share of expenditure)	59	28% ▲	1% (Share of expenditure)

Dutch visitors to Australia



Dutch visitors to Queensland



The Dutch spent \$59 million in Queensland in the year to December 2008, this was an increase of 28% from the year ended December 2007.

The Dutch spend per visitor in Queensland was \$2,302, higher than the total international per visitor average spend (in Queensland) which was \$1,975.

Dutch visitors Australia

The Dutch market saw declines from 2002, yet began to gradually increase from 2006.

First time visitors to Australia accounted for 55% of the Dutch market, this market increased by 16% over the year to December 2008. Repeat visitors remained stable over the same period.

55% of Dutch visitors travel alone, while 28% travel with a partner while in Australia.

29% of Dutch visitors to Australia were backpackers⁴, this market increased by 5% over the year to December 2008.

Dutch visitors Queensland

First time visitors (to Australia) accounted for 66% of the Dutch market to Queensland, this market increased by 27% over the year to December 2008.

Tropical North Queensland (TNQ) and Brisbane were the State's most visited regions for Dutch visitors (64% and 60% made a stopover respectively).

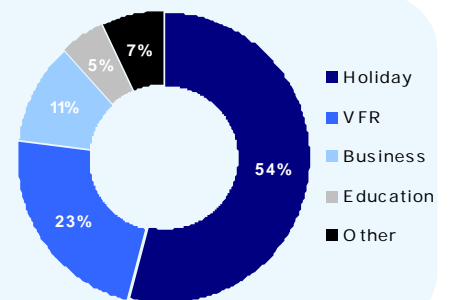
The Whitsundays and the Fraser Coast were also popular. The Whitsundays recorded growth (up 2%) over the period to the year ended December 2008, while visitor to Brisbane saw an increase of 12% from December 2007.

Main purpose of visitation to Australia

The holiday market accounted for just over half of the Dutch market to Australia. This market increased by 2% over the year to December 2008. Dutch holiday visitor nights declined by 6% over the year to December 2008. Their average length of stay was 42.8 nights.

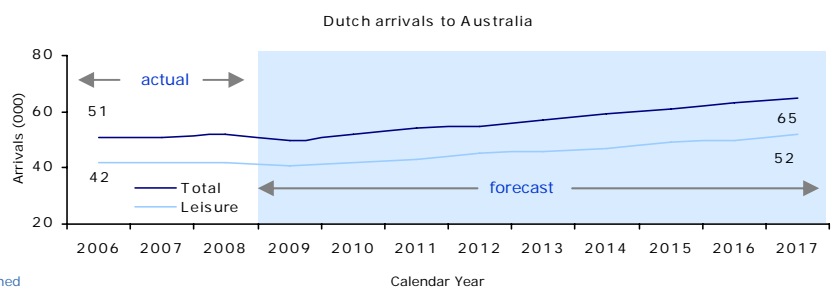
The visiting friends or relatives (VFR) market saw an increase of 6% over the year to December 2008. Dutch VFR visitor nights however, declined slightly (down 1%) over the same period.

Education visitors from the Netherlands accounted for a smaller proportion (5%) of the market than the total international market average (which is 7%). However education visitor nights accounted for 16% of all Dutch visitor nights in Australia.



Dutch arrivals forecast⁵

Arrivals to Australia from the Netherlands are forecast to increase by an average of 4% each year from 2012 to reach 65,000 arrivals in 2017.



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 2008 Issue 2

Note All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2008