

Market Snapshot

Year ended December 2008

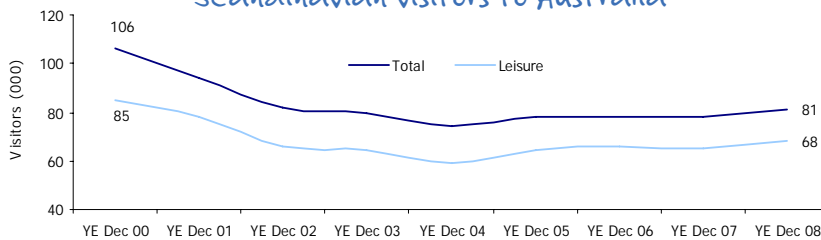


Scandinavia*

* Includes Denmark, Finland, Sweden, Norway and 'Scandinavia unspecified'

| | 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 | 81,000 | 4% ▲ | 2% | 41,000 | 5% ▲ | 2% |
| Total ALOS (nights) ¹ | 42.6 | 2.8 ▲ | | 25.2 | 0.6 ▲ | |
| Leisure² visitors | 68,000 | 5% ▲ | 2% | 38,000 | 6% ▲ | 2% |
| Leisure ALOS | 34.2 | 0.1 ▲ | | 19.5 | -1.7 ▼ | |
| Expenditure (\$m)³ | 360 | 19% ▲ | 2% (Share of expenditure) | 119 | 32% ▲ | 3% (Share of expenditure) |

Scandinavian visitors to Australia



Scandinavian visitors to Australia

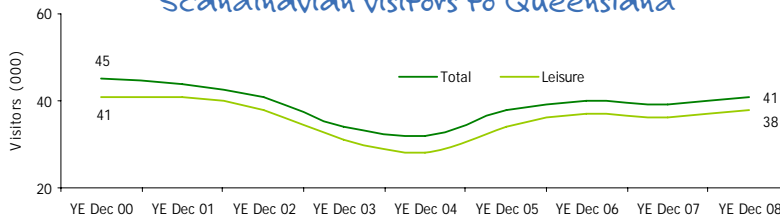
After a steady decline from 2000, Scandinavian visitor numbers to Australia have started to recover from 2004.

First time visitors to Australia accounted for 56% of the Scandinavian market, this market declined by 7% over the year to December 2008. Repeat visitors increased by 19% over the same period.

Just over half (51%) of Scandinavian visitors travel alone, while 24% travel with a partner while in Australia.

35% of Scandinavian visitors to Australia were backpackers⁴, this market increased by 6% over year to December 2008.

Scandinavian visitors to Queensland



Scandinavian visitors to Queensland

First time visitors (to Australia) accounted for 62% of the Scandinavian market to Queensland. This market has declined by 7% over the year to December 2008.

Tropical North Queensland (TNQ) and Brisbane were the State's most visited regions for Scandinavian visitors.

54% of Scandinavian visitors to Queensland went to TNQ, while half (50%) had a stopover in Brisbane. Scandinavians to the Sunshine Coast increased by 26% over the last year, while visitors to Brisbane declined by 5% over the same period.

Scandinavians spent \$119 million in Queensland in the year to December 2008. This was an increase of 32% on the same period last year.

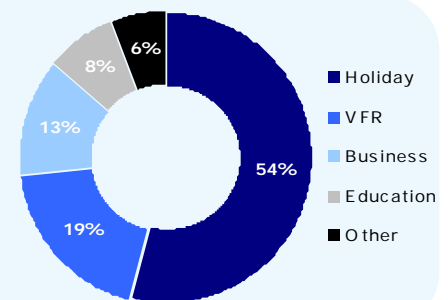
Scandinavian spend per visitor in Queensland was \$2,868, higher than the total international average spend (\$1,975) and one of the highest spend per visitor for Queensland.

Main purpose of visitation to Australia

The holiday market accounted for just over half of Scandinavian visitors to Australia. This market increased by 2% over the year to December 2008.

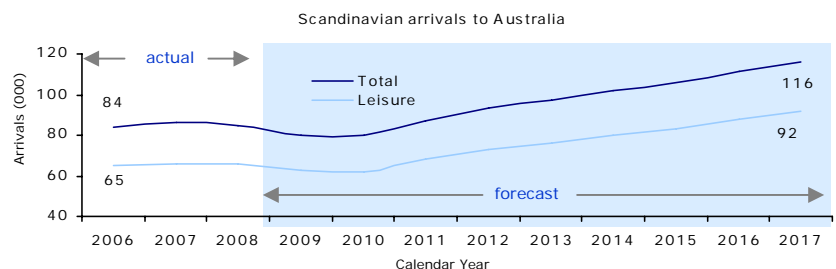
Scandinavian holiday visitor nights increased by 18% over the year to December 2008. Their average length of stay was 42.6 nights. The visiting friends or relatives (VFR) market saw an increase of 8% over the same period.

Education visitors from Scandinavia was similar to than the total international market average (which is 7%). Education visitors from Scandinavia increased by 24% over the year to December 2008, while education visitor nights were up by 16%.



Scandinavian arrivals forecast⁵

Arrivals to Australia from Nordic countries are forecast to increase by an average of 5% each year from 2012 to reach 116,000 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