

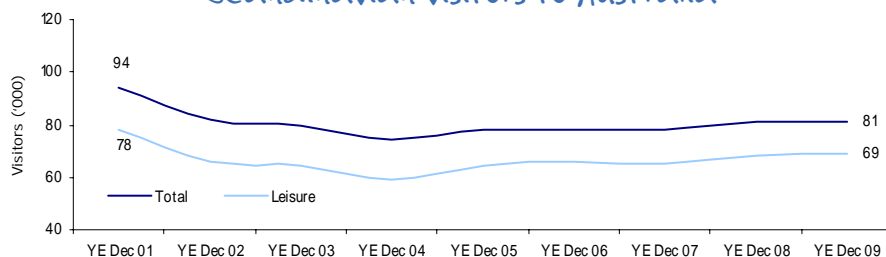
Market Snapshot

Year ended December 2009

Scandinavia*

	Australia	Change Dec 08 to Dec 09	Share of international visitors	Queensland	Change Dec 08 to Dec 09	Share of visitors to Qld
Total visitors	81,000	0%	2%	41,000	0%	2%
Total ALOS (nights) ¹	40.9	-1.7		26.6	1.5	
Leisure² visitors	69,000	1%	2%	39,000	3%	2%
Leisure ALOS	32.1	-2.1		21.8	2.4	
Expenditure (\$m)³	333	-8%	2% (share of expenditure)	104	-13%	3% (share of expenditure)

Scandinavian visitors to Australia



Scandinavian visitors to Australia

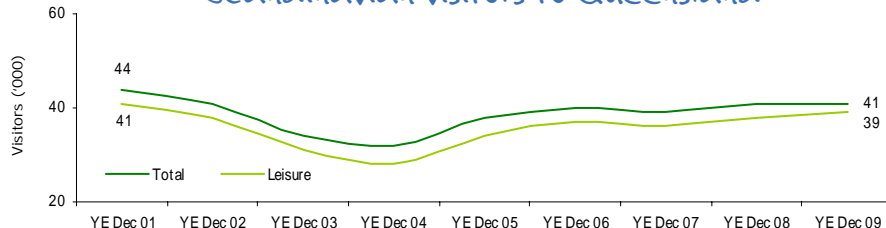
After declines from the year ended December 2001 to December 2004, Scandinavian visitors to Australia have remained largely steady.

Over half (59%) of Scandinavian visitors were first time visitors, while 40% were repeat visitors to Australia.

The majority of Scandinavian visitors travelled unaccompanied (58%), while 22% travelled as an adult couple in Australia.

37% of Scandinavian visitors to Australia were backpackers⁴. This market increased by 3% over the year to December 2009.

Scandinavian visitors to Queensland



Scandinavian visitors to Queensland

Scandinavian visitation to Queensland has remained largely steady since the year ended December 2005.

Tropical North Queensland (TNQ) and Brisbane were the Queensland regions most visited by Scandinavian visitors (59% made a stopover in each region respectively).

Scandinavians spent \$104 million on their trips to Queensland in the year to December 2009. This was a decline of 13% on the previous year.

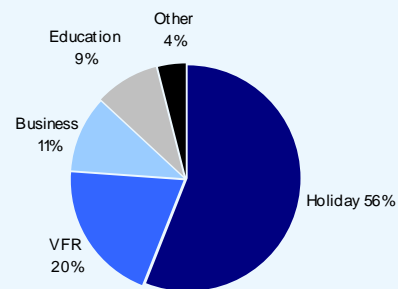
Scandinavian spend per visitor in Queensland was \$2,568. This is higher than the average spend of all international visitors to Queensland (\$1,973).

Main purpose of visitation to Australia

The holiday market accounted for 56% of Scandinavian visitors to Australia. This market increased by 2% over the year to December 2009.

However, Scandinavian holiday visitor nights declined by 8% over the year to December 2009. Their average length of stay was 38.1 nights.

The VFR (visiting friends or relatives) market remained steady at 16,000 visitors (over the same period last year).

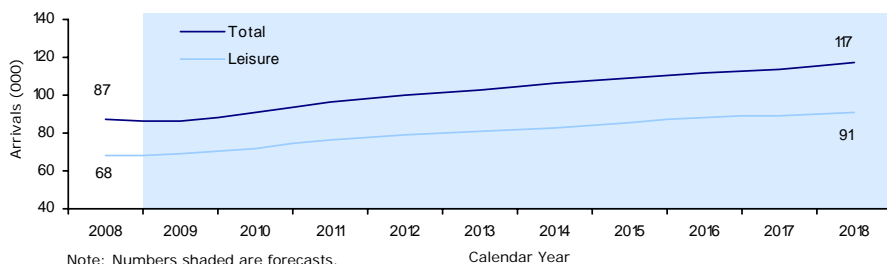


Scandinavian arrivals forecast ⁵

Arrivals to Australia from Scandinavia are forecast to increase by an average of 3% each year from 2008 to reach 117,000 arrivals in 2018.

Please note that arrivals forecast are based on total visitor arrivals into Australia, and therefore may vary from the visitation figures provided in the table above (as visitors are defined as persons over the age of 15, who are visiting Australia for 12 months or less).

Scandinavian arrivals to Australia



1. Average length of stay
 2. Leisure is holiday and visiting friends or 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/hostel
 5. Tourism Forecasting Committee 2009 Issue 2

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2009

* Includes Denmark, Finland, Sweden, Norway and "Scandinavia unspecified".