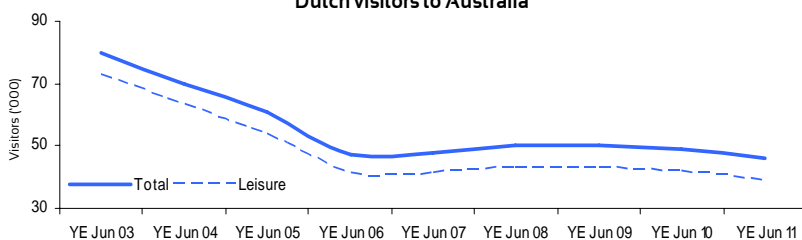


Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
Total visitors	46,000	▼ -6%	1%	22,000	▼ -12%	1%
Total ALOS (nights) ¹	41.1	▼ -2.0		24.3	▲ 1.4	
Leisure² visitors	39,000	▼ -7%	1%	20,000	▼ -13%	1%
Leisure ALOS	36.2	▼ -3.9		21.0	● 0.0	
Expenditure (\$m)³	\$168	▼ -12%	1% (share of expenditure)	\$47	▼ -20%	1% (share of expenditure)

Dutch visitors to Australia



Dutch visitors to Australia

Dutch visitors to Australia declined by 6% (or 3,000 visitors) in the year ending June 2011.

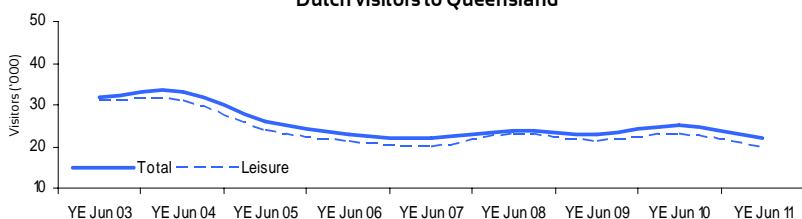
Visitors from the Netherlands to Australia are just as likely to be first time visitors as return visitors (50%).

Most Dutch visitors travel to Australia unaccompanied (57%) or in an adult couple (26%).

The majority of Dutch visitors to Australia are middle aged (50%). Almost 35% are youth visitors⁴ and this market declined by 11% in the year ending June 2011.

Around 78% of Dutch visitors disperse beyond the major gateway cities in Australia.

Dutch visitors to Queensland



Dutch visitors to Queensland

Visitation from the Netherlands to Queensland declined by 12% in the year ending June 2011. This was driven by a 23% decline in the holiday market.

Dutch visitors are most likely to visit Tropical North Queensland and Brisbane when on their trip to Queensland. Both destinations have experienced a 13% decline in Dutch visitation.

Netherlands Market Insights⁵

Australia's share of the Netherlands' outbound market did not change from 0.2% between 2000 and 2009. Growth in this market has slowed, impacted by low consumer confidence, the Icelandic volcanic ash cloud and the strong Australian dollar. Aviation capacity on the Netherlands-Australia route has been flat, although growth is expected with the removal of the environmental tourist tax from flights.

Expenditure in Queensland

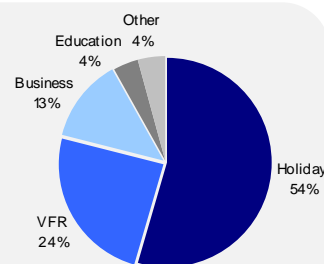
Dutch visitors spent \$47 million on their trips to Queensland in the year ending June 2011, this was a decline of 20% from the year ended June 2010.

The Dutch spent \$2,121 per visitor on their trips to Queensland. This is higher than the average spend of all international visitors to Queensland (\$1,822). The Dutch now spend \$225 less per visitor than they were in the year ending June 2010.

Main purpose of visitation to Australia

Visitation from the Netherlands to Australia declined, driven by soft holiday, employment and VFR (visiting friends and relatives) markets.

Despite this, education travel by the Dutch to Australia increased, while business travel was stable. However, holiday and VFR remain the key reasons the Dutch visit Australia.

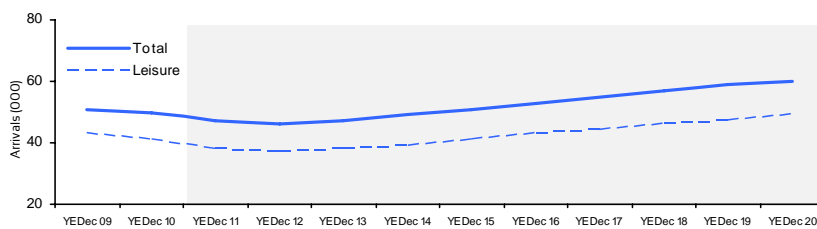


Dutch arrivals forecast⁶

Arrivals to Australia from the Netherlands are forecast to increase by 1.9% per annum between 2010 and 2020 to reach 60,000 arrivals.

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).

Forecast Dutch arrivals to Australia



Note: Numbers shaded are forecasts.

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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. Youth market represents visitors who are aged between 15 and 29 years old.
 5. Tourism Australia's Netherlands Outbound Market Share Analysis, Aviation Profile and Market Update 2010
 6. Tourism Forecasting Committee 2010 Issue 2
 Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2010