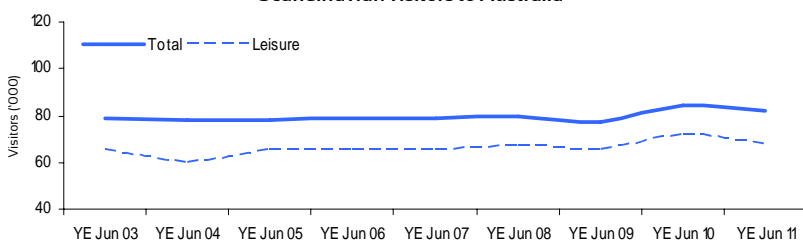


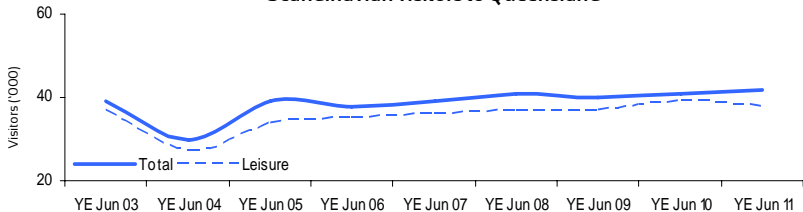
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
<b>Total visitors</b>	82,000	▼ -2%	2%	42,000	▲ 2%	2%
Total ALOS (nights) <sup>1</sup>	42.5	▲ 0.5		22.9	▼ -4.0	
<b>Leisure<sup>2</sup> visitors</b>	68,000	▼ -6%	2%	38,000	▼ -3%	2%
Leisure ALOS	33.4	▲ 2.0		19.1	▼ -1.9	
<b>Expenditure (\$m)<sup>3</sup></b>	\$324	▼ -8%	2% (share of expenditure)	\$92	▼ -16%	3% (share of expenditure)

Scandinavian visitors to Australia



Scandinavian visitors to Queensland



## Scandinavian visitors to Australia

Scandinavian visitation to Australia declined by 2% (or 2,000 visitors) in the year ending June 2011.

Most (57%) Scandinavian visitors to Australia are first time visitors and they have been declining (down 11%). However, repeat travellers have increased 13%.

Scandinavian visitors tend to travel to Australia unaccompanied (52%) or in an adult couple (18%). While these forms of travel party have declined, those travelling with family or friends has increased.

Around 45% of Scandinavian visitors to Australia are youth visitors<sup>4</sup>. Visitation from this market declined by 8% in the year ending June 2011.

## Scandinavian visitors to Queensland

Scandinavian visitation to Queensland increased by 2% in the year ending June 2011. This was driven by VFR (visiting friends or relatives), business and employment travel.

Scandinavian visitors are most likely to visit Brisbane and Tropical North Queensland (TNQ) while on their trip to Queensland. While Brisbane remained stable, TNQ recorded declines.

## Scandinavia Market Insights<sup>5</sup>

Australia's share of Norway and Sweden's outbound market decreased between 2000 and 2009, while Australia's share of Denmark's was stable and the share of Finland's increased. While the region has returning consumer confidence and a stronger economic position, the weak Euro has impacted consumers' travel purchases. Although there are no direct services between Scandinavia and Australia, there is expanding air-capacity on the route due to increasing services via Asia.

## Expenditure in Queensland

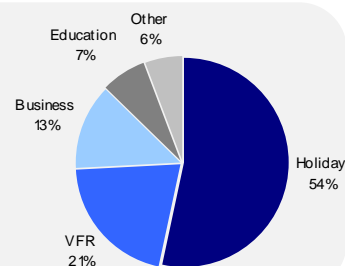
Scandinavians spent \$92 million on their trips to Queensland in the year ending June 2011. This was a decline of 16% from the year ending June 2010.

Scandinavian spend per visitor in Queensland was \$2,174. This is higher than the average spend of all international visitors to Queensland (\$1,822). Scandinavians are now spending \$513 less per visitor than they were in the year ending June 2010.

## Main purpose of visitation to Australia

Travel by Scandinavians to Australia declined, largely driven by a decline in holiday visitors, although education also contributed to the declines.

Employment and VFR travel increased, however holiday continues to remain the main reason Scandinavian visitors come to Australia.

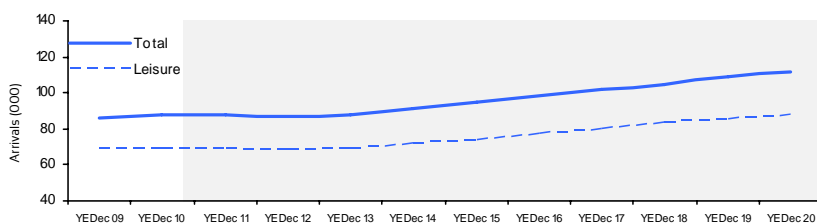


## Scandinavian arrivals forecast<sup>6</sup>

Arrivals to Australia from Scandinavia are forecast to increase by 2.4% per annum between 2010 and 2020 to reach 112,000 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 Scandinavian arrivals to Australia



Note: Numbers shaded are forecasts.

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 Nordic Market Update, Market Share Analysis and Aviation Profile 2010  
6. Tourism Forecasting Committee 2011 Issue 2  
Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2011

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

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