

Market Snapshot

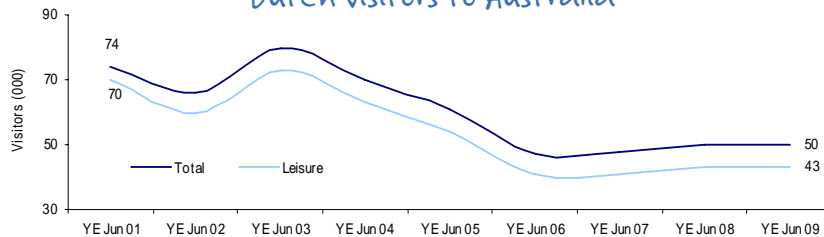
Year ended June 2009



Netherlands

	Australia	Change Jun 08 to Jun 09	Share of international visitors	Queensland	Change Jun 08 to Jun 09	Share of visitors to Qld
Total visitors	50,000	0%	1%	23,000	-4% ▼	1%
Total ALOS (nights) ¹	41.2	-3.8 ▼		22.3	-9.5 ▼	
Leisure² visitors	43,000	0%	1%	21,000	-9% ▼	1%
Leisure ALOS	36.2	-3.2 ▼		20.6	-2.7 ▼	
Expenditure (\$m)³	183	-2% ▼	1% (Share of expenditure)	48	-13% ▼	1% (Share of expenditure)

Dutch visitors to Australia



Dutch visitors to Australia

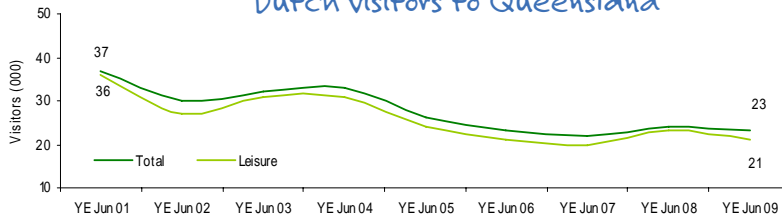
Overall, Dutch visitors to Australia have declined from the year ended June 2003, yet began to gradually increase from the year ended June 2006 (47,000 visitors) to 50,000 visitors.

Around half of visitors from the Dutch market were first time visitors (52%).

Most visitors from the Dutch market travelled unaccompanied (60%), while 26% travelled as an adult couple while in Australia.

30% of Dutch visitors to Australia were backpackers⁴.

Dutch visitors to Queensland



Dutch visitors to Queensland

Visitors from the Dutch market to Queensland declined over the year to June 2009. This was due to a decline in the holiday market (down 10%).

Tropical North Queensland (TNQ) and Brisbane were the State's most popular regions for Dutch visitors (61% and 57% made a stopover respectively).

The Whitsundays and the Fraser Coast were also popular (44% and 39% respectively), however declined over the year ended June 2009.

Dutch visitors spent \$48 million on their trip to Queensland in the year to June 2009, this was a decline of 13% from the year ended June 2008.

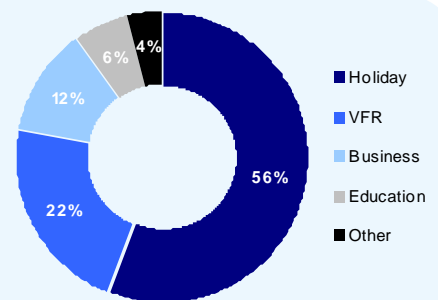
The Dutch spend per visitor in Queensland was \$2,093, slightly higher than the total international per visitor average spend (in Queensland) which was \$1,986.

Main purpose of visitation to Australia

The holiday market accounted for 56% of the Dutch market to Australia, and increased (up 4%) over the year to June 2009.

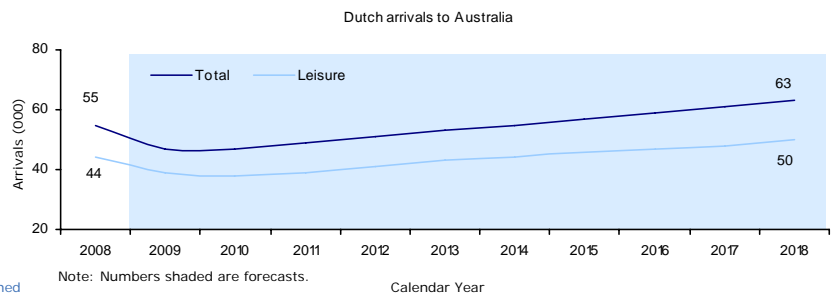
However the visiting friends or relatives (VFR) market saw a decline of 8% over this period. Dutch VFR visitor nights also declined (down 22%).

Education visitors from the Dutch accounted for a smaller proportion (6%) of the market than the total international market average (8%). However education visitor nights accounted for 16% of all Dutch visitor nights in Australia.



Dutch arrivals forecast⁵

Arrivals to Australia from the Dutch market are forecast to increase by an average of 1% each year from 2008 to reach 63,000 arrivals in 2018.



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 2009 Issue 1

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