

Market Snapshot

Year ended June 2009

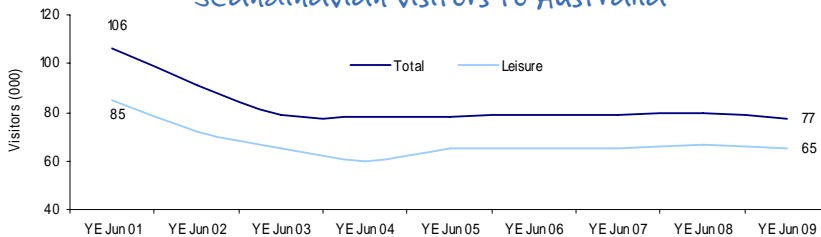


Scandinavia*

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

| | 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 | 77,000 | -4% ▼ | 2% | 40,000 | -2% ▼ | 2% |
| Total ALOS (nights) ¹ | 42.8 | 5.4 ▲ | | 27.9 | 5.2 ▲ | |
| Leisure² visitors | 65,000 | -3% ▼ | 2% | 37,000 | 0% | 2% |
| Leisure ALOS | 35.6 | 4.8 ▲ | | 22.3 | 3.8 ▲ | |
| Expenditure (\$m)³ | 338 | 7% ▲ | 2% (Share of expenditure) | 110 | 8% ▲ | 3% (Share of expenditure) |

Scandinavian visitors to Australia



Scandinavian visitors to Australia

After declines from the year ended June 2001 to June 2003, Scandinavian visitors to Australia have remained steady.

Over half (51%) of Scandinavian visitors were first time visitors, while 49% were repeat visitors to Australia.

Most Scandinavian visitors travelled unaccompanied (56%), while 25% travelled as an adult couple in the year ended June 2009.

35% of Scandinavian visitors to Australia were backpackers⁴. This market declined by 4% over the year to June 2009.

Scandinavian visitors to Queensland



Scandinavian visitors to Queensland

Scandinavian visitors to Queensland have remained steady since the year ended June 2005. Although saw a 2% decline over the past 12 months.

The majority of Scandinavian visitors were first time visitors at 58% (to Australia), a decline of 15% over the year to June 2009.

Tropical North Queensland (TNQ) and Brisbane were the State's most popular regions for Scandinavian visitors (58% and 53%, respectively).

Scandinavians spent \$110 million on their trip to Queensland in the year to June 2009. This was an increase of 8% on the previous year.

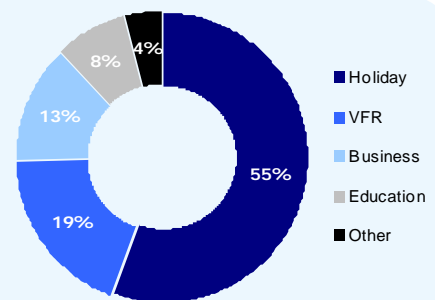
Scandinavian spend per visitor in Queensland was \$2,732, higher than the total international average spend (\$1,986).

Main purpose of visitation to Australia

The holiday market accounted for 55% of Scandinavian visitors to Australia. This market declined by 5% over the year to June 2009.

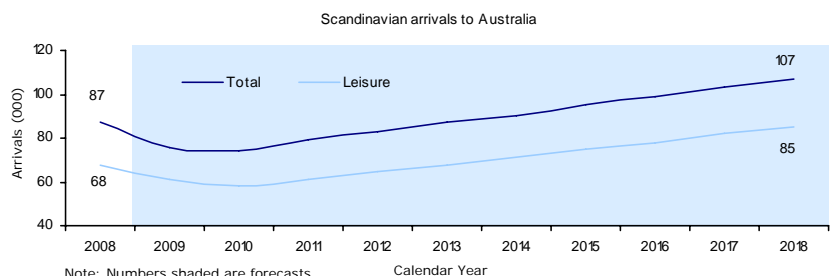
Scandinavian holiday visitor nights increased by 20% over the year to June 2009. Their average length of stay was 44.2 nights.

Visiting friends or relatives (VFR) market remained steady to 15,000 visitors over the same period.



Scandinavian arrivals forecast⁵

Arrivals to Australia from Nordic countries are forecast to increase by an average of 2% each year from 2008 to reach 107,000 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