

## 1: NSW continues to be Australia's number **one** State for visitor nights, visitor numbers and visitor expenditure

NSW - Total overnight visitors: **26.2m**; total visitor nights: **144.5m**; total expenditure: **\$18.4b**

	YE September 2010		
	New South Wales	Victoria	Queensland
Overnight Visitors	26.2m (36.3%)	17.3m (23.9%)	18m (24.9%)
Visitor Nights	144.5m (32.4%)	90.4m (20.3%)	109.6m (24.6%)
Visitor Expenditure	\$18.4b (30.9%)	\$12.4b (20.9%)	\$15.0b (25.1%)

Note: Market share provided in brackets.

### Holiday Segment - NSW continues to be the number **one** state for visitor nights, visitor numbers and visitor expenditure in the holiday segment.

- The segment of holiday visitor and holiday visitor nights is where tourism promotional activities (i.e. Tourism NSW) have the most direct impact on results.
- The Holiday segment accounts for 9 in 20 visitors to/within Australia (45.5%) – the largest of all segments.

Total	YE September 2010		
	New South Wales	Victoria	Queensland
Overnight Visitors	12.0m (36.6%)	8.1m (24.7%)	8.4m (25.6%)
Visitor Nights	60.3m (32.3%)	33.7m (18.0%)	52.6m (28.1%)
Visitor Expenditure	\$8.2b (30.5%)	\$5.2b (19.1%)	\$7.9b (29.3%)

Note: State Market share of the National holiday category provided in brackets.

## 2: Significant **growth** in visitors over the past 12 months

New South Wales	YE September 2010		
	Domestic	International	Combined
Overnight Visitors	23.4m (↑5.3%)	2.8m (↑6.6%)	26.2m (↑5.5%)
Visitor Nights	79.7m (↑4.2%)	64.8m (↑8.9%)	144.5m (↑6.2%)
Visitor Expenditure	12.6b (↑5.3%)	\$5.9b (↑2.4%)	\$18.4b (↑4.4%)

Note: % shows change on previous year (YE September 2009)

## 3: Strong **growth** in market share over the last two years in the *holiday segment* has achieved a Benefit /Cost ratio of 15:1 for the extra funding provided under the NSW Tourism Strategy

### Overall

- NSW share of total holiday visitors has grown from 34.7% to 36.6% **↑ 1.9** percentage points
- NSW share of total holiday visitors nights has grown from 29.2% to 32.3% **↑ 2.1** percentage points
- NSW share of total holiday expenditure has grown from 29.1% to 30.5% **↑ 1.4** percentage points
- This equates to an **increase of \$187 million** per annum in NSW holiday expenditure.
- Through the NSW Tourism Strategy, Tourism NSW received an additional \$10-12 million per annum. Therefore, the **return on investment** for the additional funding is **15:1 per annum**.

**Over the two year period** (September 2008-September 2010) NSW gained **4.9** million visitor nights of which 2.7 million were holiday visitor nights.

## Domestic Performance in the holiday segment

- Total Holiday Overnight visitors: 32.9% to 34.8% ↑ 1.9 percentage points
- Total Holiday Visitor Nights: 29.1% to 30.6% ↑ 1.5 percentage points : The highest since Sydney hosted the Olympics
- Total Holiday Expenditure: 27.8% to 29.3% ↑ 1.5 percentage points
- Sydney Holiday Visitor Nights: 4.7% to 4.8% ↑ 0.1 percentage points
- Regional NSW Holiday Visitor Nights\*: 37.2% to 38.8% ↑ 1.6 percentage points

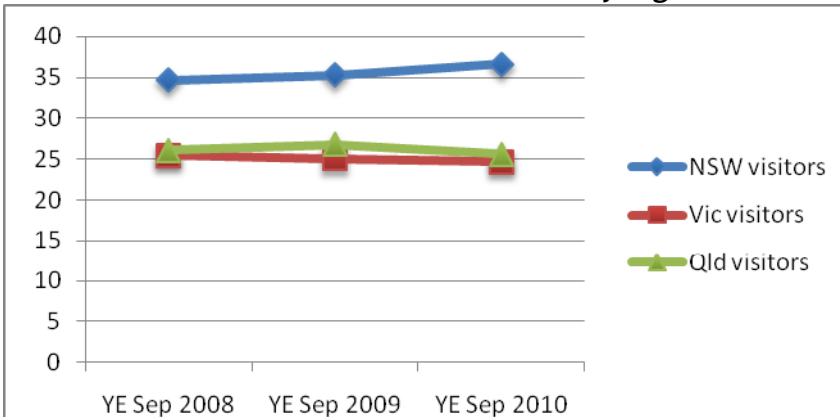
## International Performance in the holiday segment

- Total Holiday Overnight visitor: 54.9% to 55.5% ↑ 0.6 percentage points
- Total Holiday Visitor Nights: 31.9% to 35.9% ↑ 4.0 percentage points
- Total Holiday Expenditure: 34.2% to 35.1% ↑ 0.9 percentage points
- Sydney Holiday Visitor Nights: 26.3% to 29.5% ↑ 3.2 percentage points
- Regional NSW Holiday Visitor Nights: 17.2% to 20.9%\* ↑ 3.7 percentage points

## 4: In the holiday segment, NSW has **outperformed** other states over the last two years in both the domestic and international market

The Holiday segment accounts for 9 in 20 visitors to/within Australia (45.5%) – the largest of all segments.

### Total International & Domestic Visitors :: Holiday Segment Market Share



#### Total

- NSW: ↑ 34.7% to 36.6%
- VIC: ↓ 25.5% to 24.7%
- QLD: ↓ 26.1% to 25.6%

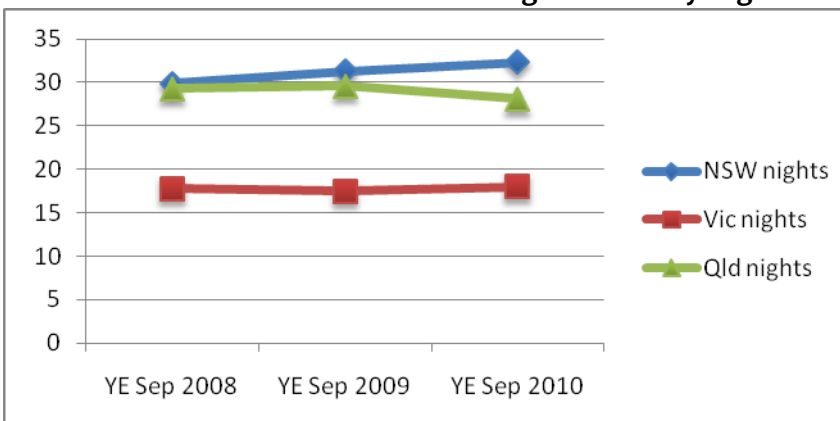
#### Domestic

- NSW: ↑ 32.9% to 34.8%
- VIC: ↓ 25.5% to 24.7%
- QLD: ↓ 26.1% to 25.6%

#### International

- NSW: ↑ 54.9% to 55.5%
- VIC: ↑ 26.6% to 27.2%
- QLD: ↓ 52.8% to 49.8%

### Total International & Domestic Visitors Nights :: Holiday Segment Market Share



#### Total

- NSW: ↑ 29.9% to 32.3%
- VIC: ↑ 17.8% to 18%
- QLD: ↓ 29.3% to 28.1%

#### Domestic

- NSW: ↑ 29.1% to 30.6%
- VIC: ↑ 19.4% to 19.7%
- QLD: ↓ 27.6% to 27.1%

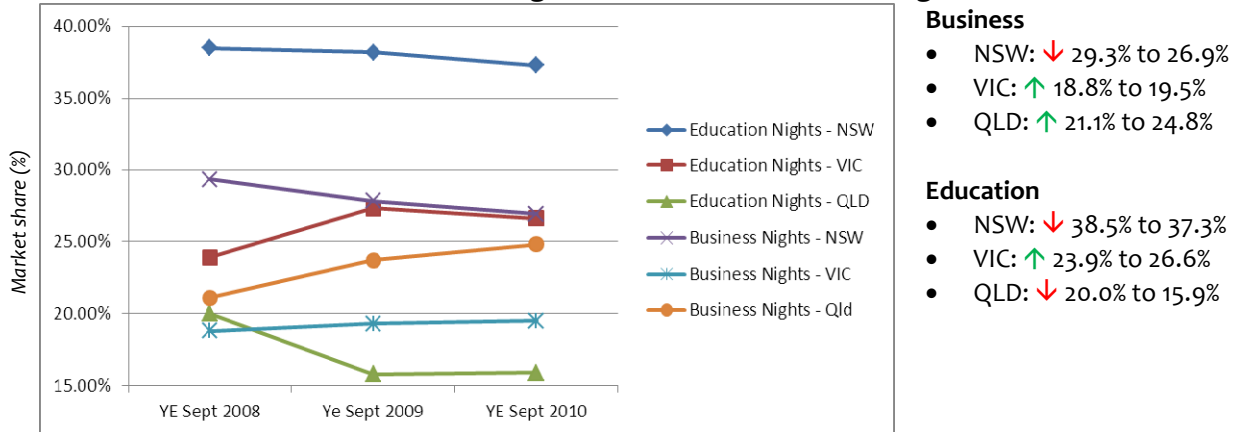
#### International

- NSW: ↑ 31.9% to 35.9%
- VIC: ↑ 13.9% to 14.5%
- QLD: ↓ 33.6% to 30.3%

\* Regional shares are calculated as a share of total regional Australia holiday visitation (i.e. the base excludes the capital cities)

## 5: In non-holiday related segments, NSW has seen market share erosion to Victoria and Queensland.

**Total International & Domestic Visitor Nights :: Business & Education Segments Market Share**

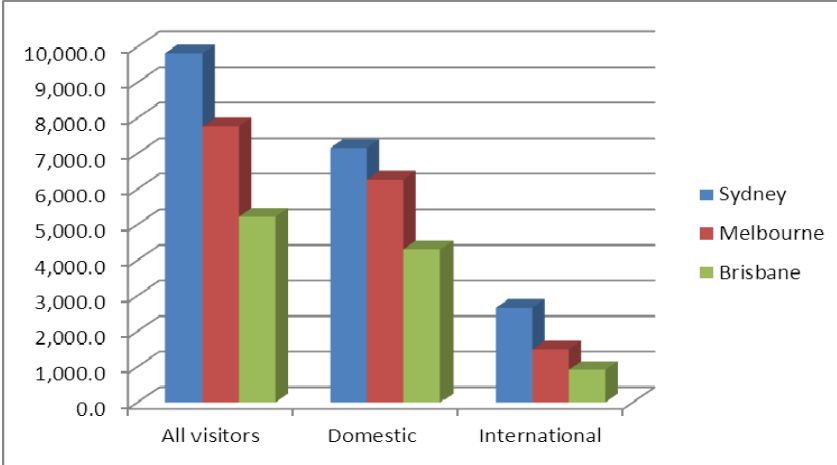


## 6: The NSW Tourism Strategy, released in November 2008, has driven a number of key marketing initiatives by Tourism NSW and the industry

- Launched new brand campaigns for Sydney and Regional NSW. These campaigns helped drive 5.85 million visits to our websites, generating over 1.28 million business leads for more than 8,000 tourism businesses listed on our website.
- NSW consumer website is now the most visited State Tourism Office website – consistently ranked #1 for number of visits.
- Increased focus on China opportunities, including launching Sydney brand into China and a number of major co-operative campaigns with airline partners in China.
- Delivered the NSW component of the Oprah Winfrey visit to Australia. To date, the Oprah visit has generated in excess of \$100 million dollars in publicity, 65% is on Sydney and NSW. These figures do not include the value of the actual broadcast of the four Oprah Shows. Initial responses from our own websites showed a 34% increase in web traffic and a 25% increase in business leads.
- Partnered with more than 220 tourism organisations to deliver more than 120 campaigns.
- Secured industry investment of more than \$10 million in our marketing campaigns.
- Initiated marketing partnerships with 13 domestic and international airlines to drive business from key international and interstate markets.
- Secured and hosted more than 400 media visits (300 domestic & 100 international) and delivered \$180.8 million in equivalent advertising value (domestic \$48.8m, international \$132m)

## 7: Sydney continues to **outperform** Melbourne and Brisbane

**Total International & Domestic Visitors to Sydney, Melbourne, Brisbane – Year Ending September 2010**



**Total Visitors**

- Sydney – 9.8m
- Melbourne – 7.8m
- Brisbane – 5.2m

**Domestic**

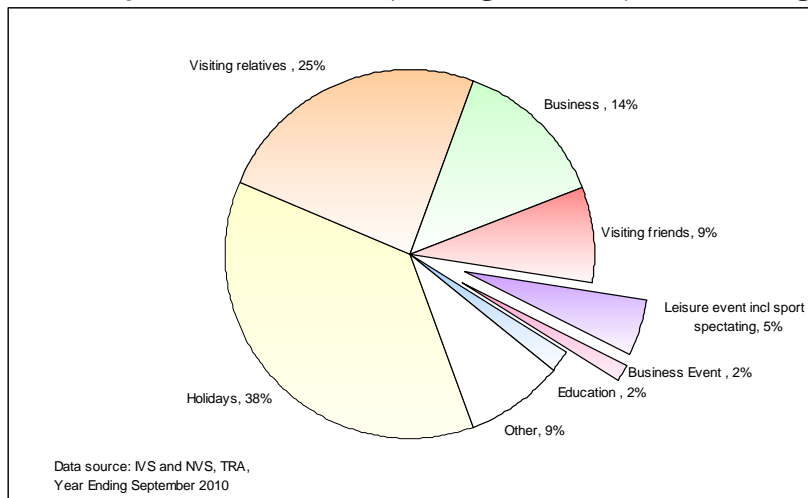
- Sydney – 7.1m
- Melbourne – 6.3m
- Brisbane – 4.3m

**International**

- Sydney – 2.7m
- Melbourne – 1.5m
- Brisbane – 0.9m

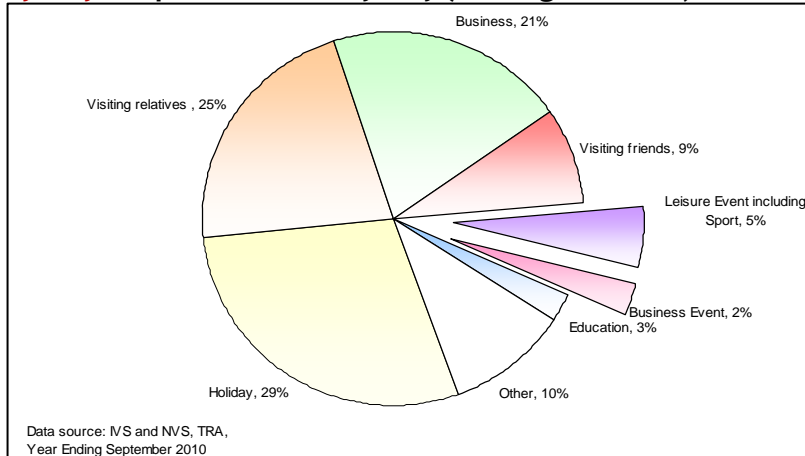
## 8: Holiday **dominates** purpose of visit to NSW & Sydney

**NSW: Purpose of visit to NSW (Overnight Visitors) – Year Ending September 2010**



- Holiday dominates purpose of visit to NSW at 38%
- Note: A visitor may have more than one purpose of visit to NSW therefore this pie chart could reflect multiple responses

**Sydney: Purpose of visit to Sydney (Overnight Visitors) – Year Ending September 2010**



- Holiday dominates purpose of visit to Sydney at 29%
- Note: A visitor may have more than one purpose of visit to NSW therefore this pie chart could reflect multiple responses