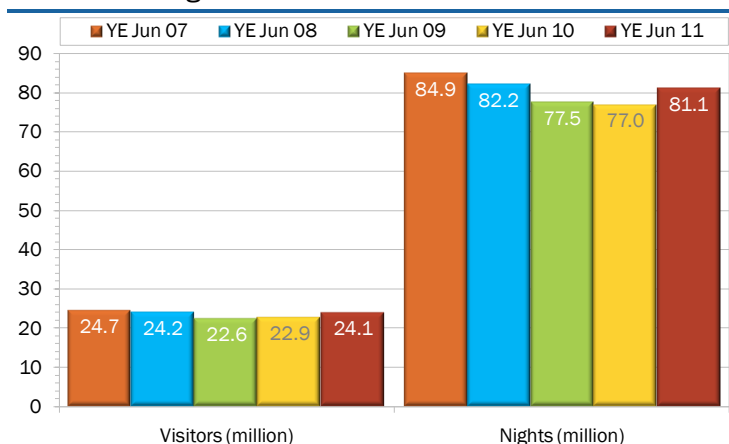


## Domestic Overnight Travel (1)

### Visitors and nights



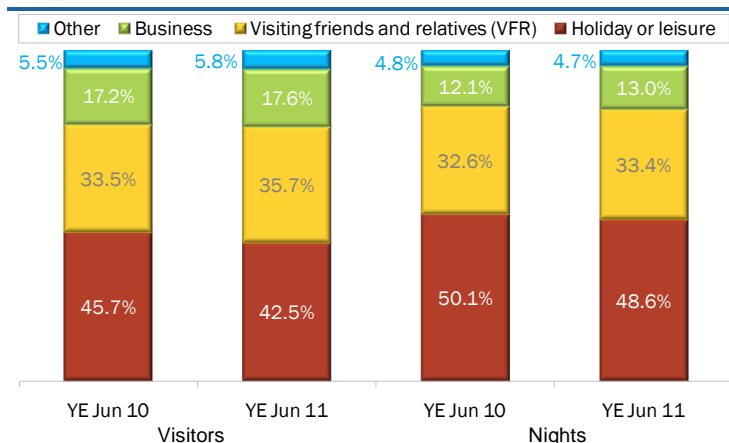
NSW received over 24.1 million domestic overnight visitors - up by 5.3%\* on YE Jun 10. Visitors spent over 81.1 million nights in the State - up by 5.4%\* on YE Jun 10.

Note: The number of domestic overnight trips to Australia increased by 3.8 percent\* on last year, but was down by 6.3 percent\* compared to four years ago.

### Market share

NSW received 35.0% of visitors and 31.2% of nights in Australia. Compared to YE Jun 10, the share of visitors was up by 0.5% points and the share of nights was up by 1.5% points.

### Purpose of visit to NSW



'Holiday or leisure' (42.5%) was the largest purpose for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (35.7%) and 'business' (17.6%). Compared to YE Jun 10, visitors who travelled for 'holiday or leisure' declined by 2.2%, 'VFR' grew by 11.9%\* and 'business' increased by 8.0%\*.

'Holiday or leisure' (48.6%) was the largest purpose in terms of nights in the State, followed by 'VFR' (33.4%) and 'business' (13.0%). Compared to YE Jun 10, nights spent for 'holiday or leisure' grew by 2.2%, 'VFR' increased by 8.2% and 'business' grew by 13.2%.

### Accommodation

'Friends or relatives property' (38.6%) was the most popular accommodation type used for nights in NSW, followed by 'standard hotel, motor inn, below 4 star' (15.6%) and 'caravan park or commercial camping ground' (13.0%).

### Origin

| Origin           | Share of visitors |           | Share of nights |           |
|------------------|-------------------|-----------|-----------------|-----------|
|                  | YE Jun 10         | YE Jun 11 | YE Jun 10       | YE Jun 11 |
| Regional NSW     | 40.6%             | 40.0%     | 36.3%           | 35.9%     |
| Sydney           | 28.4%             | 28.2%     | 26.8%           | 26.2%     |
| Total intrastate | 69.0%             | 68.2%     | 63.1%           | 62.1%     |
| Victoria         | 11.2%             | 11.4%     | 13.2%           | 14.1%     |
| Queensland       | 11.1%             | 11.6%     | 13.2%           | 13.7%     |
| ACT              | 4.5%              | 4.7%      | 3.9%            | 3.9%      |
| Other interstate | 4.3%              | 4.1%      | 6.7%            | 6.2%      |
| Total interstate | 31.0%             | 31.8%     | 36.9%           | 37.9%     |

Regional NSW (40.0%) was the largest source of visitors to the State, followed by Sydney (28.2%) and Queensland (11.6%). Compared to YE Jun 10, the regional NSW source market grew by 3.7% and Sydney increased by 4.5%. Over the same period, Queensland grew by 10.8%\*, Victoria increased by 7.2% and the ACT grew by 10.2%.

Regional NSW (35.9%) was the largest source market in terms of nights in the State, followed by Sydney (26.2%) and Victoria (14.1%). Compared to YE Jun 10, nights spent by visitors from regional NSW grew by 4.2% and nights from Victorians increased by 3.3%. Over the same period, nights by Victorians grew by 12.3%, Queensland nights increased by 9.4% and nights by visitors from the ACT grew by 6.4%.

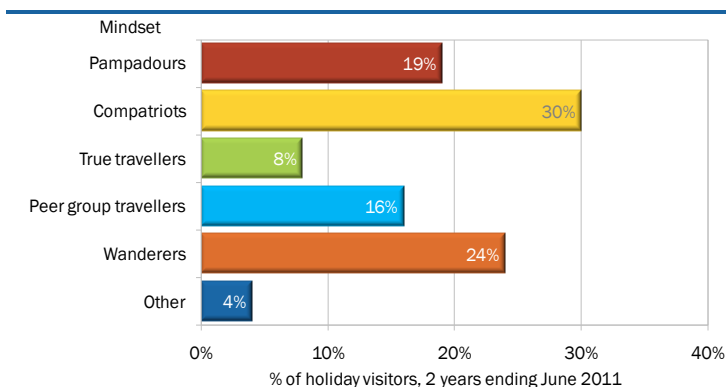
### All transport

'Private or company vehicle' (76.8%) was the most popular form of transport used by visitors to NSW, followed by 'air transport' (17.1%) and 'railway' (3.8%).

### Activities

'Eat out at restaurants' (57.6%) was the most popular activity undertaken by visitors to the State, followed by 'visit friends and relatives' (48.4%) and 'shopping for pleasure' (26.9%).

### Australian Travel Mindsets (2)



Pampadours - want luxury; Compatriots - mostly families; True travellers - want depth of experience; Peer group travellers - seeking a fun experience with friends; and Wanderers - taking time to explore and discover.

(2) Source: Inside Story, 2YE Jun 11

### Expenditure (incl airfares and transport costs) (3)

Domestic overnight visitors spent \$13.1 billion in NSW - up by 6.3%\* on YE Jun 10. On average, visitors spent \$162 per night in NSW - up by 0.6% on YE Jun 10.

(3) Source: Modelled domestic overnight visitor expenditure in Australia's regions, YE Jun 10 and YE Jun 11, TRA

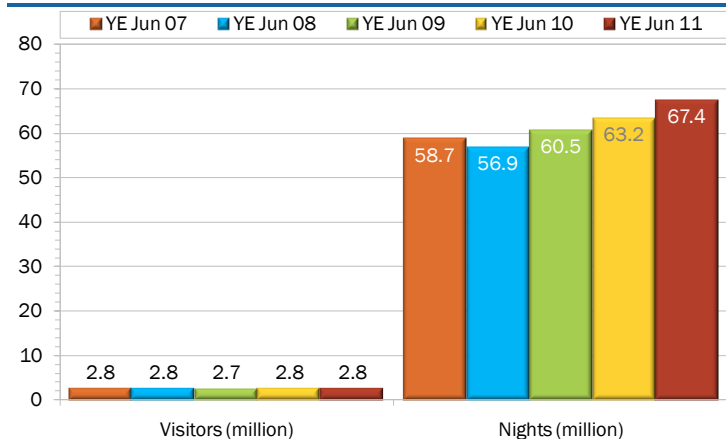
# Travel to New South Wales

Year ended June 2011

|                             |        |
|-----------------------------|--------|
| Total visitors (million)    | 76.6   |
| Total nights (million)      | 148.6  |
| - domestic nights           | 54.6%  |
| - international nights      | 45.4%  |
| Total expenditure (billion) | \$24.6 |

## International Overnight Travel (4)

### Visitors and nights



NSW received over 2.8 million international overnight visitors - up by 1.1% on YE Jun 10. Visitors spent over 67.4 million nights in the State - up by 6.6%\* on YE Jun 10.

Note: The number of overnight trips to Australia by international visitors increased by 3.4 percent\* on last year and by 5.1 percent\* compared to four years ago.

### Market share

NSW received 51.5% of visitors and 35.6% of nights in Australia. Compared to YE Jun 10, the share of visitors was down by 1.2% pts and the share of nights was up by 1.0% pt.

### Purpose of visit to NSW

'Holiday / pleasure' (55.6%) was the largest purpose for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (25.2%) and 'business' (15.2%). Compared to YE Jun 10, visitors who travelled for 'holiday / pleasure' declined by 0.3% and 'VFR' decreased by 0.6% while 'business' grew by 3.7%.

### Origin - share of visitors to NSW

| Share of international visitors to New South Wales |                     |           |           |      |                          |           |           |
|--|---------------------|-----------|-----------|------|--------------------------|-----------|-----------|
| Rank   | Market              | YE Jun 10 | YE Jun 11 | Rank | Market                   | YE Jun 10 | YE Jun 11 |
| 1  | New Zealand         | 13.2%     | 14.0%     | 12   | Scandinavia              | 2.1%      | 1.8%      |
| 2  | Mainland China & HK | 12.0%     | 13.2%     | 13   | Indonesia                | 1.8%      | 1.8%      |
|  | Mainland China      | 9.2%      | 10.2%     | 14   | Taiwan                   | 2.0%      | 1.7%      |
|  | Hong Kong           | 2.8%      | 3.0%      | 15   | Malaysia                 | 1.5%      | 1.6%      |
| 3  | United Kingdom      | 13.2%     | 12.4%     | 16   | Thailand                 | 1.4%      | 1.4%      |
| 4  | USA                 | 11.5%     | 10.3%     | 17   | Italy                    | 1.3%      | 1.3%      |
| 5  | Korea               | 5.3%      | 5.5%      | 18   | Middle East & Nth Africa | 1.3%      | 1.2%      |
| 6  | Japan               | 4.9%      | 5.3%      | 19   | Ireland                  | 1.4%      | 1.1%      |
| 7  | Germany             | 3.9%      | 3.6%      | 20   | Netherlands              | 1.1%      | 1.1%      |
| 8  | Singapore           | 2.8%      | 3.3%      | 21   | Switzerland              | 1.0%      | 1.0%      |
| 9  | Canada              | 3.0%      | 2.8%      |      | Other Asia               | 2.4%      | 2.3%      |
| 10   | India               | 2.1%      | 2.4%      |      | Other Europe             | 2.8%      | 2.7%      |
| 11   | France              | 2.4%      | 2.1%      |      | Other Countries          | 5.7%      | 6.0%      |

### Accommodation

'Rented house / apartment / unit / flat' (42.2%) was the most popular accommodation type used for nights in NSW by international visitors.

### Expenditure (incl pre-paid package expenditure) (5)

International overnight visitors spent \$6.5 billion in NSW - up by 7.2%\* on YE Jun 10. On average, visitors spent \$97 per night in NSW - up by 1.0% on YE Jun 10.

(5) Caution: international expenditure now includes 30% of pre-paid package expenditure but still excludes all pre-paid international airfares.

Source: Modelled international overnight visitor expenditure in Australia's regions, YE Jun 10 and YE Jun 11, TRA. For more details go to [www.tourism.nsw.gov.au/StateTourismStats](http://www.tourism.nsw.gov.au/StateTourismStats)

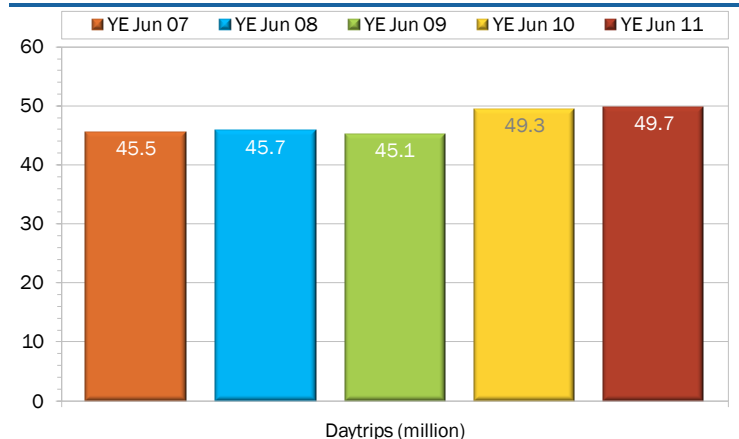
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

\* The percentage change is statistically significant.

(4) Source: International Visitor Survey, YE Jun 11, TRA

## Domestic Daytrip Travel (6)

### Daytrips



NSW received nearly 49.7 million domestic daytrip visitors - up by 0.7% on YE Jun 10.

Note: The number of domestic daytrips to Australia increased by 0.6 percent on last year and by 9.4 percent\* compared to four years ago.

### Market share

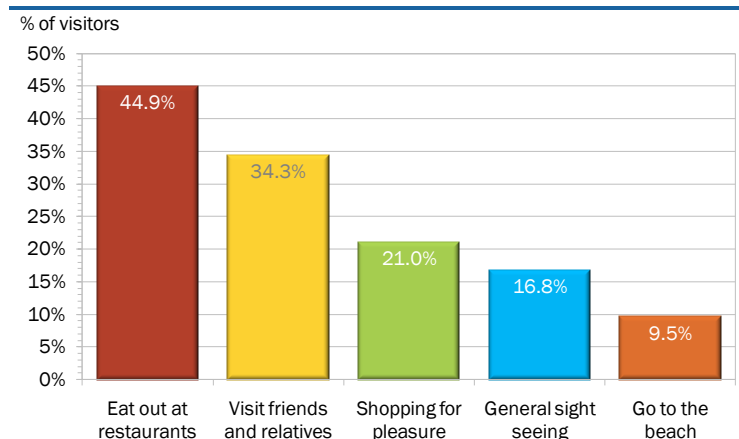
NSW received 32.7% of daytrips in Australia. Compared to YE Jun 10, the share was unchanged.

### Main purpose of trip

'Holiday or leisure' (48.5%) was the largest purpose for visitors to the State, followed by 'visiting friends and relatives (VFR)' (29.8%) and 'business' (9.3%).

Compared to YE Jun 10, visitors who travelled for 'holiday or leisure' grew marginally, 'VFR' increased by 2.9% while 'business' declined by 11.1%.

### Activities



'Eat out at restaurants' (44.9%) was the most popular activity undertaken by visitors to NSW. 'Visit friends and relatives' (34.3%) was the 2<sup>nd</sup> most popular, followed by 'shopping for pleasure' (21.0%).

### Expenditure (7)

Domestic daytrip visitors spent \$4.9 billion in NSW - down by 3.4% on YE Jun 10. On average, they spent \$100 per trip to the State - down by 3.8% on YE Jun 10.

(7) Source: Modelled domestic day visitor expenditure in Australia's regions, YE Jun 10 and YE Jun 11, TRA

(6) Source: National Visitor Survey, YE Jun 11, TRA