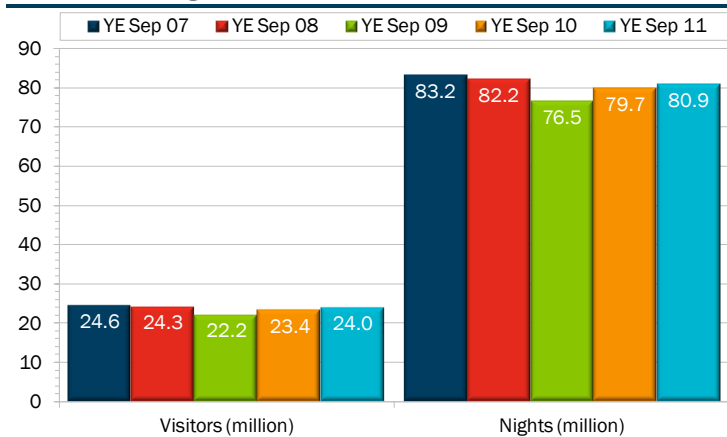


Domestic Overnight Travel (1)

Visitors and nights



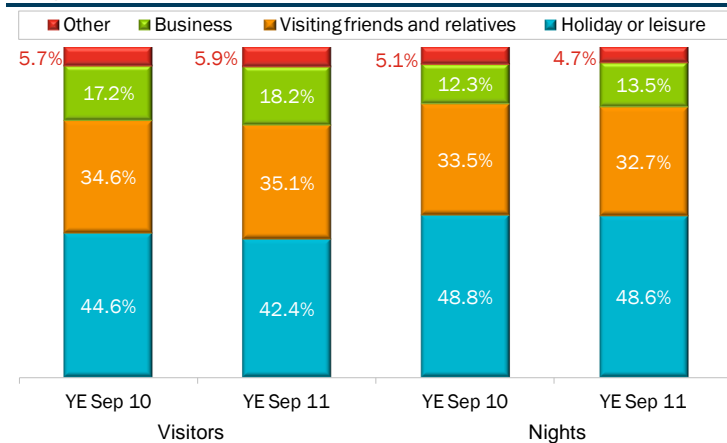
NSW received over 24.0 million domestic overnight visitors - up by 2.6% on YE Sep 10. Visitors spent over 80.9 million nights in the State - up by 1.5% on YE Sep 10.

Note: The number of domestic overnight trips to Australia increased by 4.2 percent* on last year, but was down by 6.5 percent* compared to four years ago.

Market share

NSW received 34.5% of visitors and 30.9% of nights in Australia. Compared to YE Sep 10, the share of visitors was down by 0.5% pts and the share of nights was up by 0.4% pts.

Purpose of visit to NSW



'Holiday or leisure' (42.4%) was the largest purpose for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (35.1%) and 'business' (18.2%). Compared to YE Sep 10, visitors who travelled for 'holiday or leisure' declined by 2.4% while 'VFR' grew by 4.1% and 'business' increased by 8.8%*.

'Holiday or leisure' (48.6%) was the largest purpose in terms of nights in the State, followed by 'VFR' (32.7%) and 'business' (13.5%). Compared to YE Sep 10, nights spent for 'holiday or leisure' grew by 1.2% while 'VFR' declined by 0.8% and 'business' increased by 11.5%.

Accommodation

'Friends or relatives property' (38.4%) was the most popular accommodation type used for nights in NSW, followed by 'standard hotel, motor inn, below 4 star' (15.3%) and 'caravan park or commercial camping ground' (13.0%).

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.

(1) Source: National Visitor Survey, YE Sep 11, Tourism Research Australia (TRA)

Origin

Origin	Share of visitors		Share of nights	
	YE Sep 10	YE Sep 11	YE Sep 10	YE Sep 11
Regional NSW	40.8%	40.2%	36.0%	36.6%
Sydney	28.4%	28.0%	26.8%	25.7%
Total intrastate	69.2%	68.2%	62.8%	62.4%
Victoria	11.2%	11.2%	13.6%	13.7%
Queensland	11.0%	11.7%	13.4%	13.6%
ACT	4.3%	4.9%	3.7%	4.0%
Other interstate	4.3%	4.2%	6.4%	6.4%
Total interstate	30.8%	31.8%	37.2%	37.6%

Regional NSW (40.2%) was the largest source of visitors to the State, followed by Sydney (28.0%) and Queensland (11.7%). Compared to YE Sep 10, the regional NSW source market grew by 1.0% and Sydney increased by 1.1%. Over the same period, Queensland grew by 8.5% and Victoria increased by 2.4% while the ACT grew by 14.8%*.

Regional NSW (36.6%) was the largest source market in terms of nights in the State, followed by Sydney (25.7%) and Victoria (13.7%). Compared to YE Sep 10, nights spent by visitors from regional NSW grew by 3.4% while nights from Sydney declined by 2.5%. Over the same period, nights by Victorians grew by 2.0% and Queensland nights increased by 2.3% while nights by visitors from the ACT grew by 10.3%.

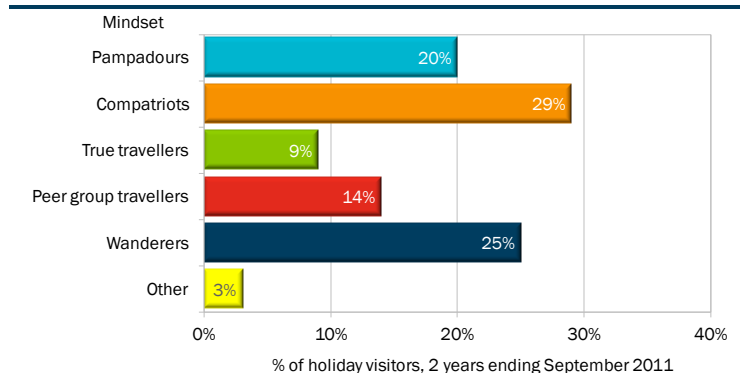
All transport

'Private or company vehicle' (76.7%) was the most popular form of transport used by visitors to NSW, followed by 'air transport' (17.1%) and 'railway' (3.7%).

Activities

'Eat out at restaurants' (57.1%) was the most popular activity undertaken by visitors to the State, followed by 'visit friends and relatives' (48.5%) 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 Sep 11

Expenditure (incl airfares and transport costs) (3)

Domestic overnight visitors spent \$12.9 billion in NSW - up by 2.6% on YE Sep 10. On average, visitors spent \$159 per night in NSW - up by 1.3% on YE Sep 10.

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

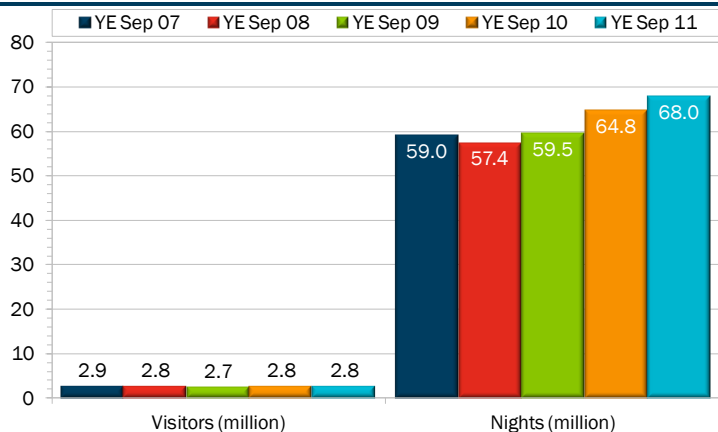
Travel to New South Wales

Year ended September 2011

Total visitors (million)	76.9
Total nights (million)	148.9
- domestic nights	54.4%
- international nights	45.6%
Total expenditure (billion)	\$24.4

International Overnight Travel (4)

Visitors and nights



NSW received nearly 2.8 million international overnight visitors - down by 2.0% on YE Sep 10. Visitors spent nearly 68.0 million nights in the State - up by 4.9% on YE Sep 10.

Note: The number of overnight trips to Australia by international visitors increased by 1.0 percent on last year and by 3.9 percent* compared to four years ago.

Market share

NSW received 51.1% of visitors and 35.5% of nights in Australia. Compared to YE Sep 10, the share of visitors was down by 1.6% pts and the share of nights was up by 0.5% pts.

Purpose of visit to NSW

'Holiday / pleasure' (55.1%) was the largest purpose for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (25.1%) and 'business' (15.2%). Compared to YE Sep 10, visitors who travelled for 'holiday / pleasure' declined by 4.5%* and 'VFR' decreased by 3.1% while 'business' grew by 0.2%.

Origin - share of visitors to NSW

Share of international visitors to New South Wales							
Rank	Market	YE Sep 10	YE Sep 11	Rank	Market	YE Sep 10	YE Sep 11
1	New Zealand	13.5%	13.8%	12	Scandinavia	2.0%	1.9%
2	Mainland China & HK	12.6%	13.4%	13	Indonesia	1.8%	1.9%
	Mainland China	9.8%	10.4%	14	Malaysia	1.5%	1.7%
	Hong Kong	2.8%	3.0%	15	Taiwan	1.9%	1.6%
3	United Kingdom	12.6%	12.5%	16	Thailand	1.4%	1.4%
4	USA	11.0%	10.1%	17	Italy	1.3%	1.3%
5	Korea	5.4%	5.4%	18	Middle East & Nth Africa	1.3%	1.2%
6	Japan	5.3%	5.2%	19	Ireland	1.3%	1.2%
7	Germany	3.7%	3.7%	20	Switzerland	1.0%	1.0%
8	Singapore	3.0%	3.3%	21	Netherlands	1.1%	1.0%
9	Canada	2.9%	2.9%		Other Asia	2.3%	2.3%
10	India	2.2%	2.4%		Other Europe	2.8%	2.7%
11	France	2.3%	2.1%		Other Countries	5.7%	6.0%

Accommodation

'Rented house / apartment / unit / flat' (42.0%) 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 5.8% on YE Sep 10. On average, visitors spent \$96 per night in NSW - up by 1.1% on YE Sep 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 Sep 10 and YE Sep 11, TRA. For more details go to www.tourism.nsw.gov.au/StateTourismStats

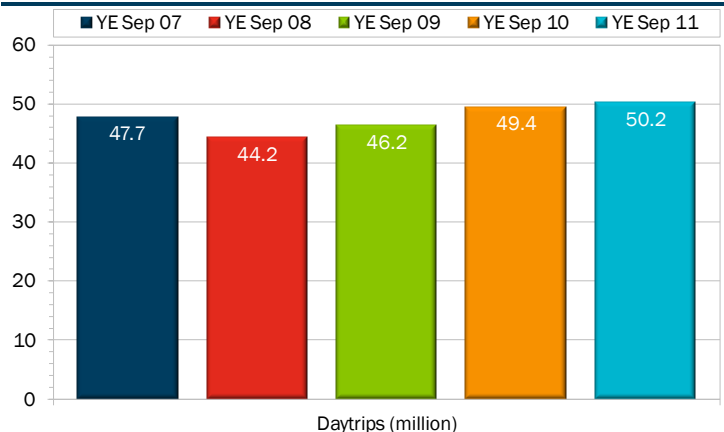
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

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

Domestic Daytrip Travel (6)

Daytrips



NSW received nearly 50.2 million domestic daytrip visitors - up by 1.5% on YE Sep 10.

Note: The number of domestic daytrips to Australia increased by 0.8 percent on last year and by 5.5 percent* compared to four years ago.

Market share

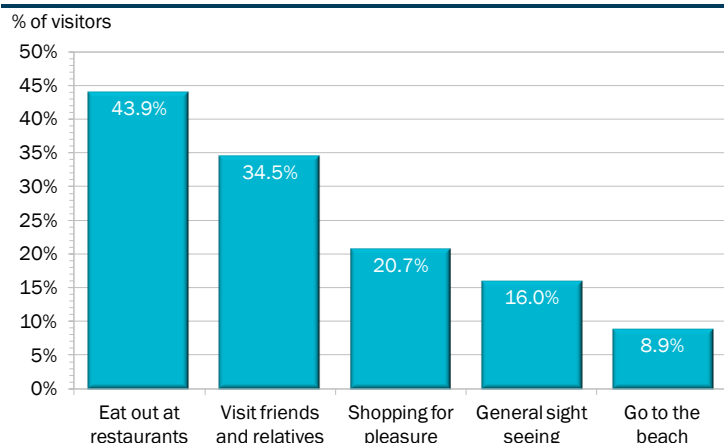
NSW received 32.8% of daytrips in Australia. Compared to YE Sep 10, the share was up by 0.2% points.

Main purpose of trip

'Holiday or leisure' (47.8%) was the largest purpose for visitors to the State, followed by 'visiting friends and relatives (VFR)' (29.5%) and 'business' (9.8%).

Compared to YE Sep 10, visitors who travelled for 'holiday or leisure' declined by 2.0% while 'VFR' grew by 3.4% and 'business' increased by 0.1%.

Activities



'Eat out at restaurants' (43.9%) was the most popular activity undertaken by visitors to NSW. 'Visit friends and relatives' (34.5%) was the 2nd most popular, followed by 'shopping for pleasure' (20.7%).

Expenditure (7)

Domestic daytrip visitors spent \$5.1 billion in NSW - down by 1.8% on YE Sep 10. On average, they spent \$101 per trip to the State - down by 2.9% on YE Sep 10.

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

www.tourism.nsw.gov.au

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

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