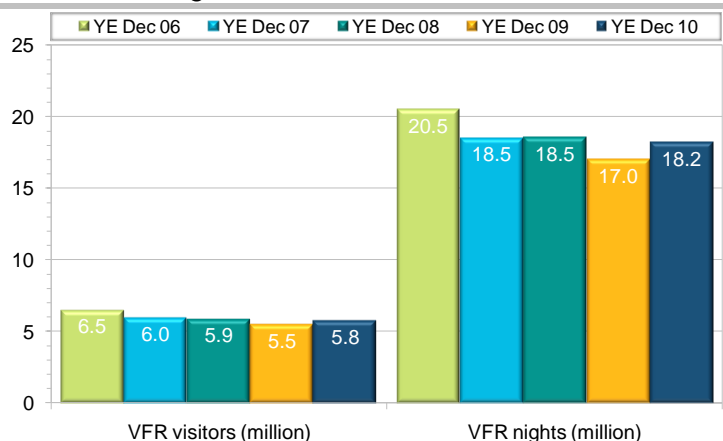




### Domestic Overnight VFR Travel <sup>(1)</sup>

#### Visitors and nights



Regional NSW received 5.8 million domestic overnight visitors who visited for the purpose of 'visiting friends and relatives' (VFR) - up by 5.2% on YE Dec 09. VFR visitors spent 18.2 million nights in regional NSW - up by 7.0% on YE Dec 09.

#### Market share

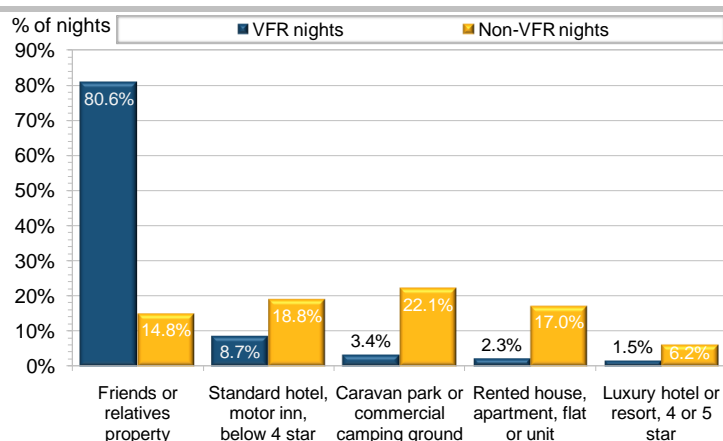
VFR travel represented 35.0% of visitors and 31.5% of nights in regional NSW. Compared to YE Dec 09, the share of visitors was up by 1.1% pts and the share of nights was up by 2.1% pts.

Regional NSW received 71.5% of VFR visitors and 69.0% of VFR nights in the State. Compared to YE Dec 09, the share of visitors was up by 1.3% pts and the share of nights was up by 1.1% pts.

#### Month returned from visit to regional NSW

January (13.1%) was the most popular month for VFR **visitors** to visit regional NSW, while March (6.1%) was the least popular. More VFR **nights** in regional NSW were spent in January (17.7%) than any other month, while June (5.3%) had the least nights.

#### Accommodation

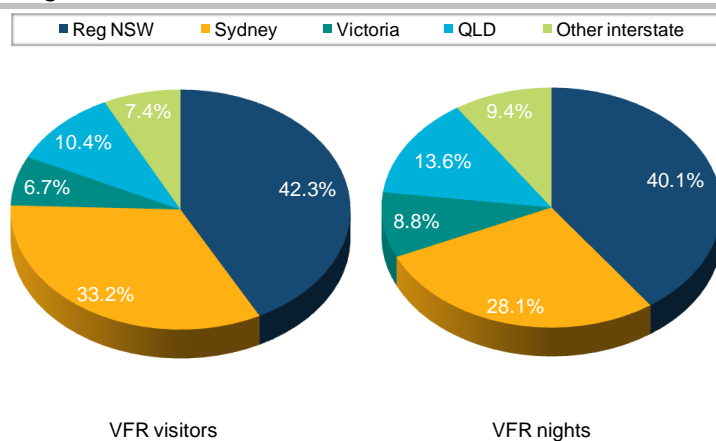


'Friends or relatives property' (80.6%) was the most popular accommodation type used for VFR nights in regional NSW, followed by 'standard hotel, motor inn, below 4 star' (8.7%) and 'caravan park or commercial camping ground' (3.4%).

#### Age

'55 to 64 years' (19.3%) was the largest age group of VFR visitors to regional NSW, followed by '65 years and over' (19.1%) and '35 to 44 years' (17.2%).

#### Origin



Regional NSW received 75.6% of VFR visitors and 68.2% of VFR nights from **intrastate** (regional NSW contributed more than Sydney for both visitors and nights).

**Interstate** contributed 24.4% of VFR visitors and 31.8% of VFR nights in regional NSW (Queensland was the biggest interstate market for both visitors and nights).

#### Length of stay

VFR visitors stayed, on average, 3.1 nights in regional NSW.

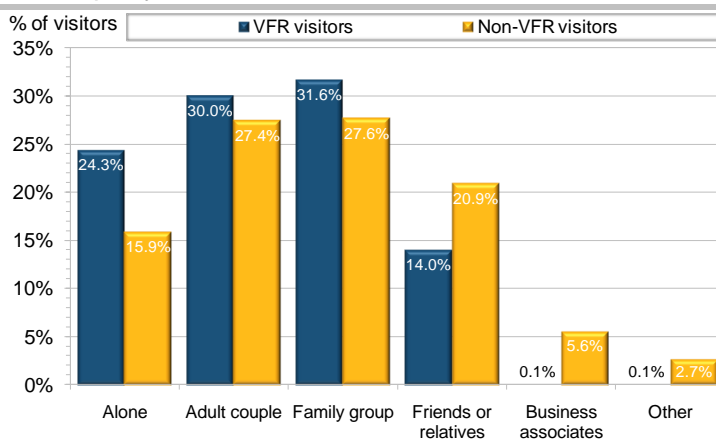
#### All transport

'Private or company car' (87.4%) was the most popular form of transport used by VFR visitors to regional NSW, followed by 'air transport' (7.1%) and 'railway' (4.3%).

#### Activities

'Visit friends and relatives' (87.9%) was the most popular activity undertaken by VFR visitors to regional NSW, followed by 'eat out at restaurants' (47.3%) and 'go shopping for pleasure' (26.0%).

#### Travel party



'Family group' (31.6%) was the largest travel party of VFR visitors to regional NSW, followed by 'adult couple' (30.0%) and 'alone' (24.3%).

#### Expenditure (excl motor vehicles purchases etc) <sup>(2)</sup>

VFR visitors spent \$1.4 billion in regional NSW. On average, they spent \$75 per night in regional NSW.

*(2) Estimated using data from TRA's modelled domestic overnight visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 10. Expenditure prorated based on the number of nights.*

Note: Percentage change figures provided in this snapshot do not necessarily represent statistically significant change.

(1) Source: National Visitor Survey, YE Dec 10, Tourism Research Australia (TRA) - unless otherwise indicated

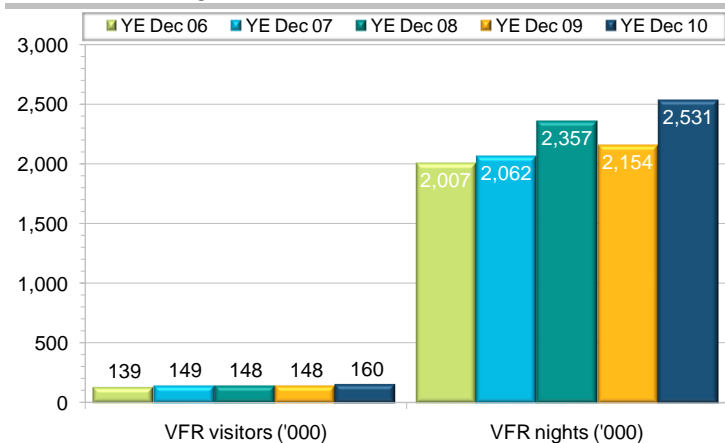
# Travel to Regional NSW to Visit Friends and Relatives

## Year ended December 2010

VFR visitors to regional NSW (million)	14.8
VFR nights in regional NSW (million)	20.7
VFR expenditure in regional NSW (billion)	\$2.0

### International Overnight VFR Travel <sup>(3)</sup>

#### Visitors and nights



Regional NSW received 159,500 international overnight VFR visitors - up by 8.1% on YE Dec 09. VFR visitors spent 2.5 million nights in regional NSW - up by 17.5% on YE Dec 09.

#### Market share

VFR travel represented 25.5% of visitors and 23.5% of nights in regional NSW. Compared to YE Dec 09, the share of visitors was up by 0.4% pts and the share of nights was down by 0.2% pts.

Regional NSW received 22.1% of VFR visitors and 17.7% of VFR nights in the State. Compared to YE Dec 09, the share of visitors was up by 0.8% pts and share of nights was down by 0.2% pts.

#### Seasonality

The December quarter (34.1%) had the highest proportion of VFR visitors who had visited regional NSW, while the September quarter (19.3%) had the lowest.

#### Origin

No.	Market	Share	No.	Market	Share
1	New Zealand	24.9%	12	India	1.3%
2	United Kingdom	24.3%	13	Scandinavia	1.2%
3	USA	10.1%	14	Switzerland	1.2%
4	Canada	4.5%	15	France	1.2%
5	Germany	2.8%	16	Indonesia	1.1%
6	Ireland	2.4%	17	Thailand	1.1%
7	Middle East & Nth Africa	2.1%	18	Korea	0.7%
8	Singapore	1.9%	19	Malaysia	0.6%
9	Japan	1.9%	20	Italy	0.6%
10	Mainland China & HK	1.9%	21	Taiwan	0.6%
	Mainland China	0.7%		Other Asia	2.8%
	Hong Kong	1.2%		Other Europe	4.4%
11	Netherlands	1.4%		Other Countries	5.1%

New Zealand (24.9%) was regional NSW's largest source market of VFR visitors, followed by the UK (24.3%).

#### Accommodation

'Home of friend or relative' (92.1%) was the most popular accommodation type used for VFR nights in regional NSW, followed by 'rented house / apartment / unit / flat' (2.9%) and 'standard hotel / motel / motor inn, below 4 star' (1.5%).

#### Expenditure (excl package expenditure) <sup>(4)</sup>

VFR visitors spent \$109 million in regional NSW. On average, they spent \$43 per night in regional NSW.

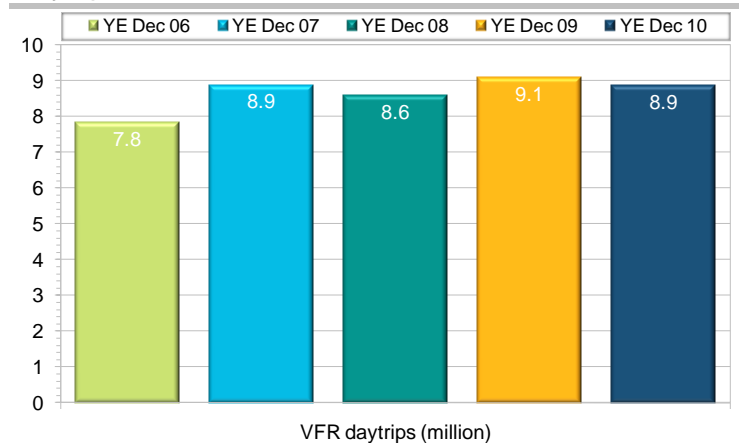
*(4) Estimated using data from TRA's modelled international visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 10. Expenditure prorated based on the number of nights.*

Note: Percentage change figures provided in this snapshot do not necessarily represent statistically significant change.

*(3) Source: International Visitor Survey, YE Dec 10, TRA*

### Domestic Daytrip VFR Travel <sup>(5)</sup>

#### Daytrips



Regional NSW received 8.9 million domestic daytrip VFR visitors - down by 2.6% on YE Dec 09.

#### Market share

VFR travel represented 28.0% of daytrips in regional NSW. Compared to YE Dec 09, the share was down by 2.0% pts.

Regional NSW received 62.3% of VFR daytrips in NSW. Compared to YE Dec 09, the share was down by 1.6% pts.

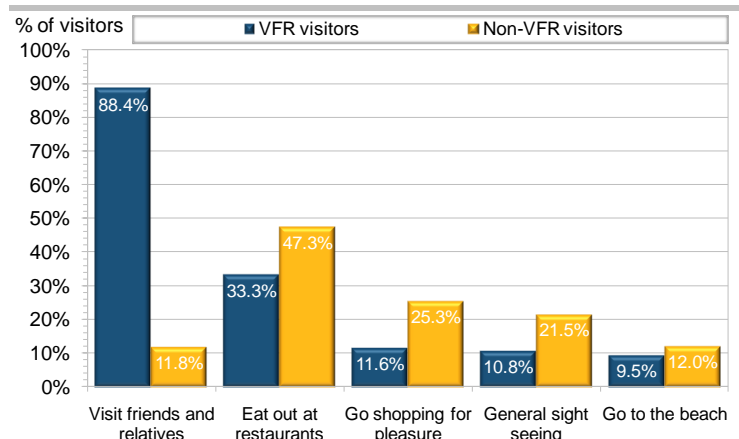
#### Month returned from trip to regional NSW

April (11.8%) was the most popular month for VFR visitors to visit regional NSW, while June (6.5%) was the least popular.

#### Age

'65 years and over' (19.3%) was the largest age group of VFR visitors to regional NSW, followed by '35 to 44 years' (19.0%) and '45 to 54 years' (18.6%).

#### Activities



'Visit friends and relatives' (88.4%) was the most popular activity undertaken by VFR visitors to regional NSW. 'Eat out at restaurants' (33.3%) was the 2<sup>nd</sup> most popular, followed by 'go shopping for pleasure' (11.6%) and 'general sight seeing' (10.8%).

#### Expenditure <sup>(6)</sup>

VFR visitors spent \$564 million in regional NSW. On average, they spent \$64 per trip to regional NSW.

*(6) Estimated using data from TRA's modelled domestic day visitor expenditure in capital cities and regional areas & by purpose of visit in NSW, YE Dec 10. Expenditure prorated based on the number of visitors.*