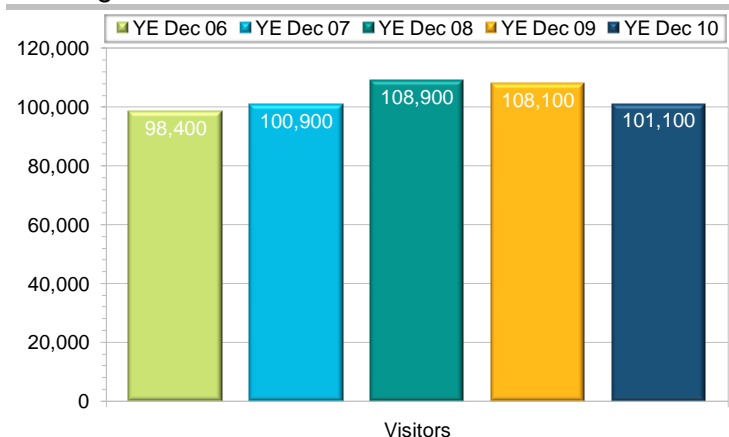


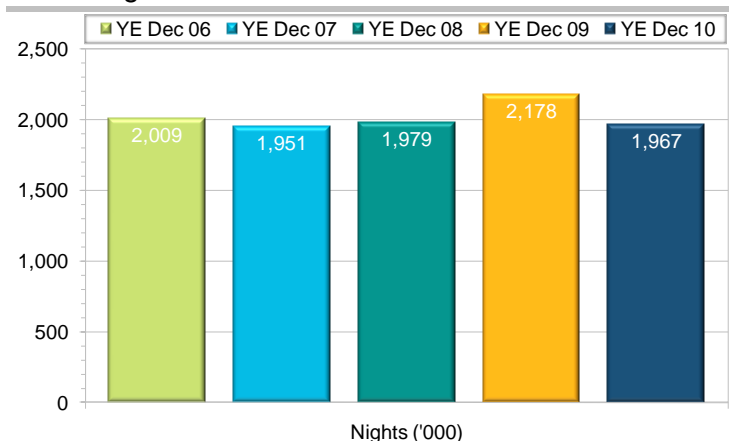
### Overnight visitors



NSW received 101,100 overnight visitors from Germany - down by 6.5% on YE Dec 09. Germany contributed 3.6% of visitors to the State - down by 0.4% points on YE Dec 09.

Note: The 'open skies' agreement between the USA and the European Union provides increased competition for Australian destinations. The Working Holiday Maker Visa scheme is important for this market.

### Visitor nights



Visitors from Germany spent nearly 2.0 million nights in NSW - down by 9.7% on YE Dec 09. Germany contributed 3.0% of visitor nights in the State - down by 0.5% points on YE Dec 09.

### Market share

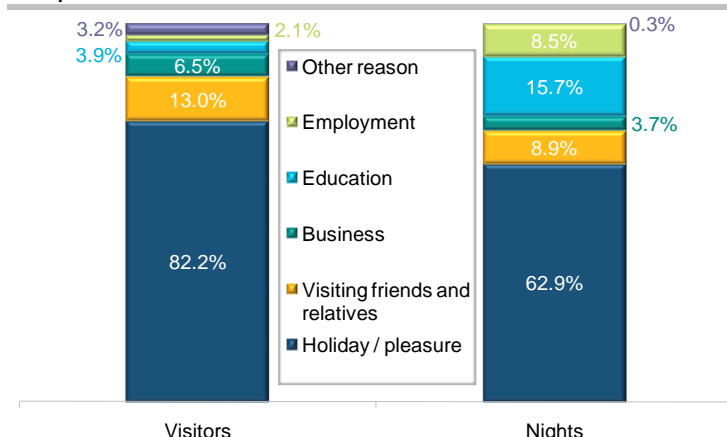
NSW received 65.1% of visitors and 29.3% of nights by German travellers in Australia. Compared to YE Dec 09, the share of visitors was down by 4.2% points and the share of nights was down by 1.0% point.

### Accommodation

'Backpacker / hostel' (25.3%) was the most popular accommodation type used by German visitors for nights in NSW. 'Rented house / apartment / unit / flat' (23.7%) was the 2<sup>nd</sup> most popular, followed by 'home of friend or relative' (18.7%) and 'standard hotel / motel / motor inn, below 4 star' (7.2%).

'Holiday / pleasure' visitors from Germany spent more nights in NSW in a 'backpacker / hostel' (35.8%) than in any other accommodation. 'Home of a friend or relative' (15.6%) was the 2<sup>nd</sup> most popular, followed by 'rented house / apartment / unit / flat' (14.7%).

### Purpose of visit



'Holiday / pleasure' (82.2%) was the largest purpose for German visitors to the State. 'Visiting friends and relatives' (13.0%) was the 2<sup>nd</sup> largest, followed by 'business' (6.5%).

'Holiday / pleasure' (62.9%) was the largest purpose in terms of nights by German visitors in NSW. 'Education' (15.7%) was the 2<sup>nd</sup> largest, followed by 'visiting friends and relatives' (8.9%).

### Length of stay

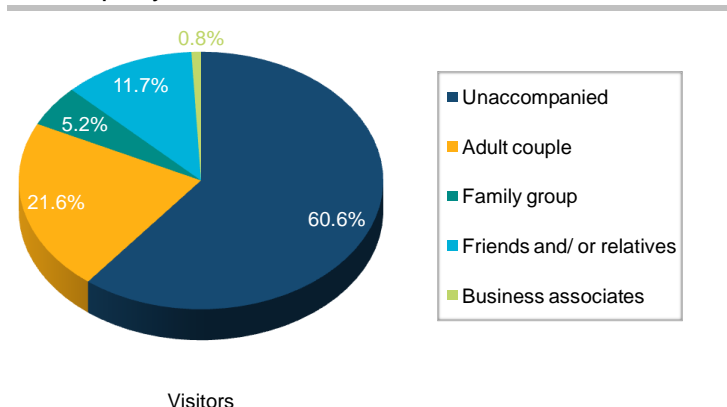
Purpose of visit	Ave length of stay (nights)		Median stay (nights)	
	NSW	Australia	NSW	Australia
Holiday / pleasure	14.9	42.1	7	24
Visiting friends and relatives	13.3	28.6	14	22
Business	11.2	17.7	7	8
Education	79.3	134.1	90	149
Employment	78.9	93.9	92	78
Other reason	1.8	27.0	1	1
Total	19.4	43.2	7	23

Visitors from Germany stayed, on average, 19.4 nights in NSW, while their average stay in Australia was 43.2 nights.

The median length of stay in the State was 7 nights, compared to 23 nights in Australia.

'Holiday / pleasure' visitors from Germany had an average stay of 14.9 nights and a median stay of 7 nights in NSW.

### Travel party



'Unaccompanied' (60.6%) was the most common travel party description for German overnight visitors to the State. 'Adult couple' (21.6%) was the 2<sup>nd</sup> most common, followed by 'friends and / or relatives' (11.7%).

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

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

# Germany Market Profile <sup>(1)</sup>

## Year ended December 2010

Visitors to NSW	101,100
Nights in NSW (million)	2.0
Expenditure in NSW (million)	\$ 153
Expenditure per visitor in NSW	\$ 1,513

### Top 5 places visited in NSW

No.	Region	% of visitors to NSW
1	Sydney	95.2%
2	Northern Rivers	24.7%
3	Mid North Coast	14.7%
4	The Hunter	9.7%
5	Blue Mountains	7.5%

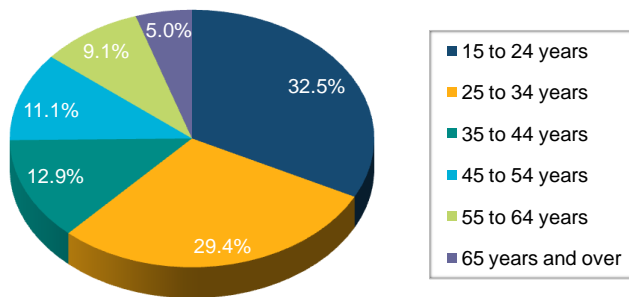
'Sydney' (95.2%) was by far the most visited region in NSW by German overnight visitors. 'Northern Rivers' (24.7%) was the 2<sup>nd</sup> most visited region, followed by 'Mid North Coast' (14.7%) and 'The Hunter' (9.7%).

German overnight visitors to Australia: 'Sydney' (62.0%) was the most visited region, followed by 'Melbourne' (36.5%) and 'Tropical North Queensland' (33.3%).

### Gender

A larger proportion of German overnight visitors to the State were female (51.8%) than male (48.2%).

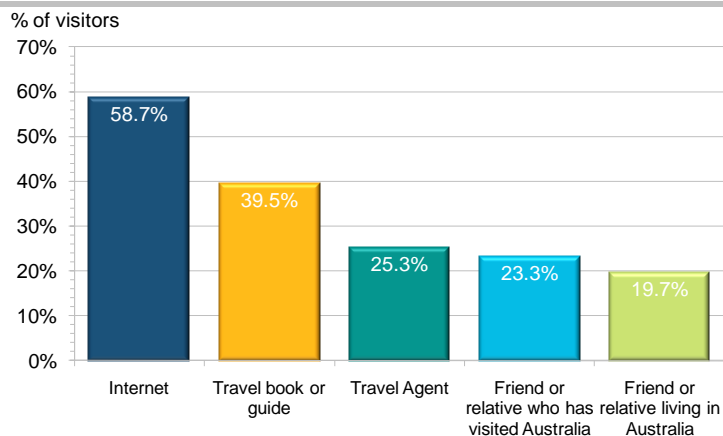
### Age



Visitors

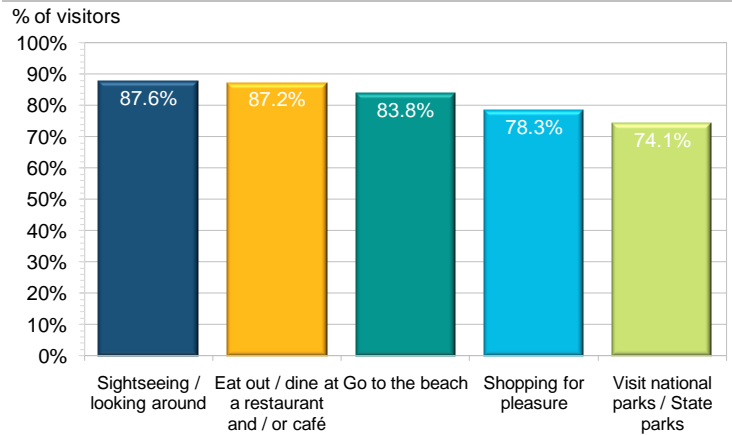
'15 to 24 years' (32.5%) was the biggest age group of German overnight visitors to NSW, followed by '25 to 34 years' (29.4%) and '35 to 44 years' (12.9%).

### Top 5 information sources



The 'internet' (58.7%) was the most popular information source for the trip to Australia by German overnight visitors who had been to NSW. 'Travel book or guide' (39.5%) was the 2<sup>nd</sup> most popular, followed by 'travel agent' (25.3%) and 'friend or relative who has visited Australia' (23.3%).

### Top 5 activities in Australia



'Sightseeing / looking around' (87.6%) was the most popular activity undertaken during the trip to Australia by German overnight visitors who had been to NSW. 'Eat out / dine at a restaurant and / or cafe' (87.2%) was the 2<sup>nd</sup> most popular activity, followed by 'go to the beach' (83.8%).

### Transport

'Aircraft' (32.8%) was the most common transport used to destinations in NSW by German overnight visitors. 'Private or company car' (17.8%) was the 2<sup>nd</sup> most common, followed by 'taxi or chauffeur driven hire car' (16.7%).

### First time or repeat visit

Most German overnight visitors who had been to NSW (68.7%) were visiting Australia for the first time.

### Travel package

Almost 1/5 (19.7%) of German overnight visitors who had been to the State, arrived in Australia on a travel package. 'All accommodation' (54.8%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'airfares within Australia' (51.8%).

### Group tours

The rate of group tour travel to Australia, amongst German overnight visitors who had been to NSW, was 4.7%.

### Expenditure (excl package expenditure) <sup>(2)</sup>

Destination	Total (\$ million)	Per visitor \$	Per night \$
New South Wales	\$153	\$1,513	\$78
Australia	\$509	\$3,278	\$76

German overnight visitors spent \$153 million in NSW. In total, they spent \$509 million in Australia. On average, visitors from Germany spent \$1,513 per visitor and \$78 per night in NSW.

*(2) Source: Modelled international overnight visitor expenditure in Australia's regions, YE Dec 10, TRA*

### Forecast <sup>(3)</sup>

German visitors to Australia are expected to increase from 161,000\* in 2009 to 212,000\* in 2020, an average annual growth rate of 2.5%.

*(3) Source: Forecast 2010 Issue 2, Tourism Forecasting Committee  
\* Includes children less than 15 years*