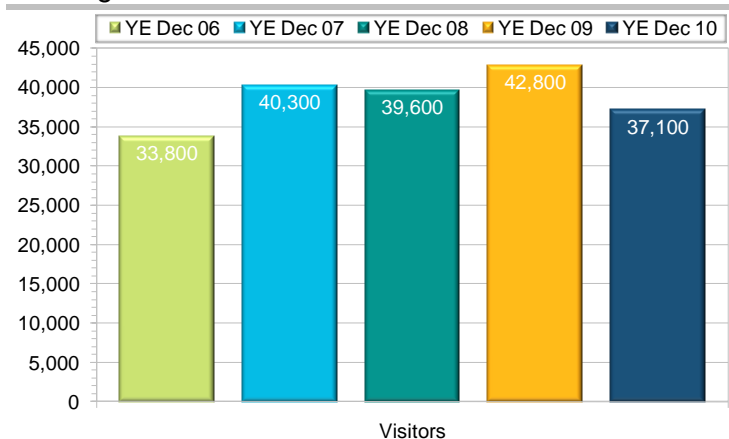


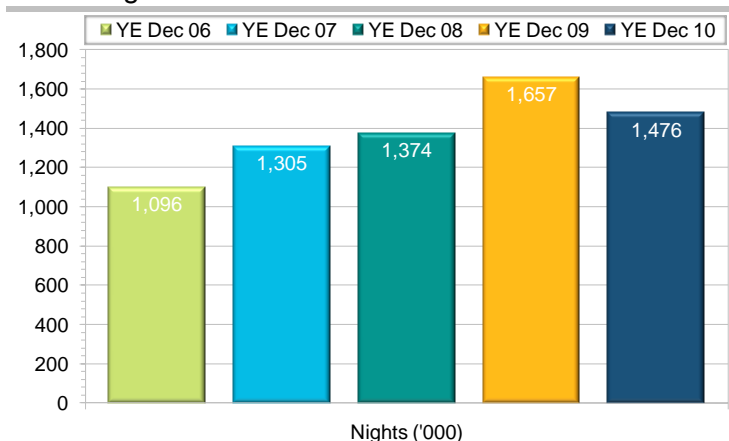
### Overnight visitors



NSW received 37,100 overnight visitors from Thailand - down by 13.2% on YE Dec 09. Thailand contributed 1.3% of visitors to the State - down by 0.3% points on YE Dec 09.

Note: The growth in the number of competitive airfares offered by low cost carriers and traditional airlines to rival destinations has reduced Australia's share of outbound travel from Thailand. Political instability has reduced outbound tourism.

### Visitor nights



Visitors from Thailand spent nearly 1.5 million nights in NSW - down by 10.9% on YE Dec 09. Thailand contributed 2.3% of visitor nights in the State - down by 0.4% points on YE Dec 09.

### Market share

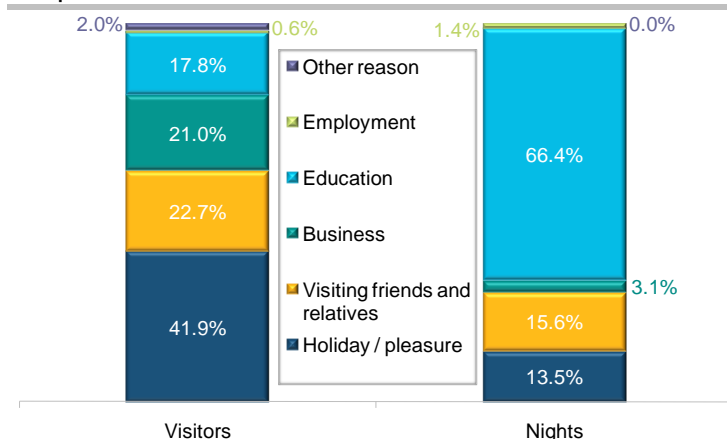
NSW received 47.4% of visitors and 35.9% of nights by Thai travellers in Australia. Compared to YE Dec 09, the share of visitors was down by 8.6% points and the share of nights was down by 5.2% points.

### Accommodation

'Rented house / apartment / unit / flat' (54.4%) was the most popular accommodation type used by Thai visitors for nights in NSW. 'Home of friend or relative' (25.3%) was the 2<sup>nd</sup> most popular, followed by 'homestay' (4.6%) and 'serviced apartment' (4.4%).

'Holiday / pleasure' visitors from Thailand spent more nights in NSW in a 'home of friend or relative' (72.7%) than in any other accommodation. 'standard hotel / motel / motor inn, below 4 star' (12.4%) was the 2<sup>nd</sup> most popular, followed by 'luxury hotel / serviced apartment / resort, 4 or 5 star' (8.8%).

### Purpose of visit



'Holiday / pleasure' (41.9%) was the largest purpose for Thai visitors to the State. 'Visiting friends and relatives' (22.7%) was the 2<sup>nd</sup> largest, followed by 'business' (21.0%).

'Education' (66.4%) was the largest purpose in terms of nights by Thai visitors in NSW. 'Visiting friends and relatives' (15.6%) was the 2<sup>nd</sup> largest, followed by 'holiday / pleasure' (13.5%).

### Length of stay

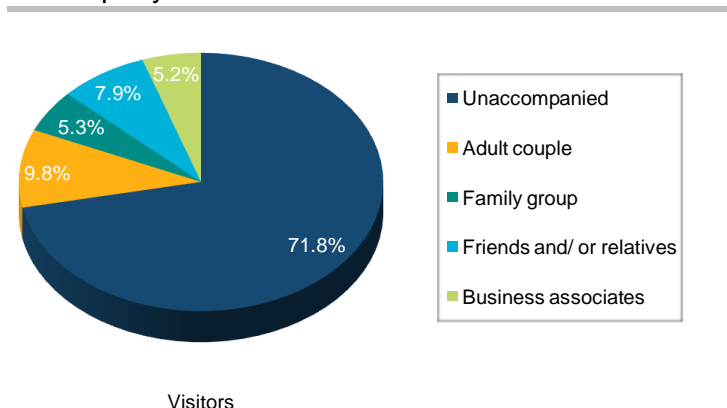
| Purpose of visit               | Ave length of stay (nights) |           | Median stay (nights) |           |
|--------------------------------|-----------------------------|-----------|----------------------|-----------|
|                                | NSW                         | Australia | NSW                  | Australia |
| Holiday / pleasure             | 12.8                        | 29.9      | 4                    | 9         |
| Visiting friends and relatives | 27.4                        | 29.2      | 14                   | 15        |
| Business                       | 5.9                         | 17.8      | 5                    | 5         |
| Education                      | 148.0                       | 160.9     | 148                  | 162       |
| Employment                     | 96.9                        | 125.2     | 99                   | 99        |
| Other reason                   | 1.0                         | 41.0      | 1                    | 10        |
| Total                          | 39.8                        | 52.5      | 6                    | 11        |

Visitors from Thailand stayed, on average, 39.8 nights in NSW, while their average stay in Australia was 52.5 nights.

The median length of stay in the State was 6 nights, compared to 11 nights in Australia.

'Holiday / pleasure' visitors from Thailand had an average stay of 12.8 nights and a median stay of 4 nights in NSW.

### Travel party



'Unaccompanied' (71.8%) was the most common travel party description for Thai overnight visitors to the State. 'Adult couple' (9.8%) was the 2<sup>nd</sup> most common, followed by 'friends and / or relatives' (7.9%).

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

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

## Year ended December 2010

|                                |         |
|--------------------------------|---------|
| Visitors to NSW                | 37,100  |
| Nights in NSW (million)        | 15      |
| Expenditure in NSW (million)   | \$ 145  |
| Expenditure per visitor in NSW | \$3,908 |

### Top 5 places visited in NSW

| No. | Region               | % of visitors to NSW |
|-----|----------------------|----------------------|
| 1   | Sydney               | 93.7%                |
| 2   | The Hunter           | 4.5%                 |
| 3   | Illawarra sub-region | 3.2%                 |
| 4   | Northern Rivers      | 1.2%                 |
| 5   | Mid North Coast      | 1.1%                 |

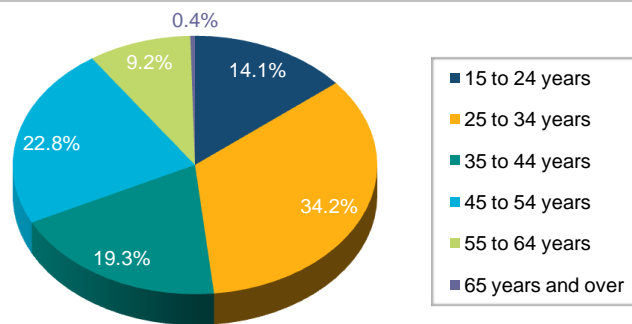
'Sydney' (93.7%) was by far the most visited region in NSW by Thai overnight visitors. 'The Hunter' (4.5%) was the 2<sup>nd</sup> most visited, followed by 'Illawarra sub-region' (3.2%) and 'Northern Rivers' (1.2%).

Thai overnight visitors to Australia: 'Sydney' (44.4%) was the most visited region, followed by 'Melbourne' (33.7%) and 'Experience Perth' (18.6%).

### Gender

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

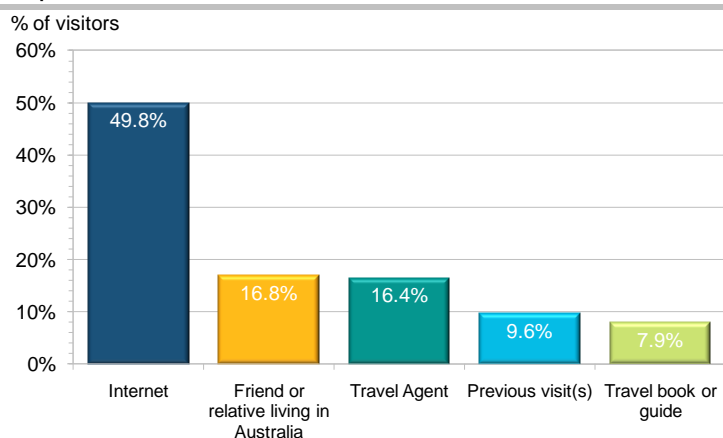
### Age



Visitors

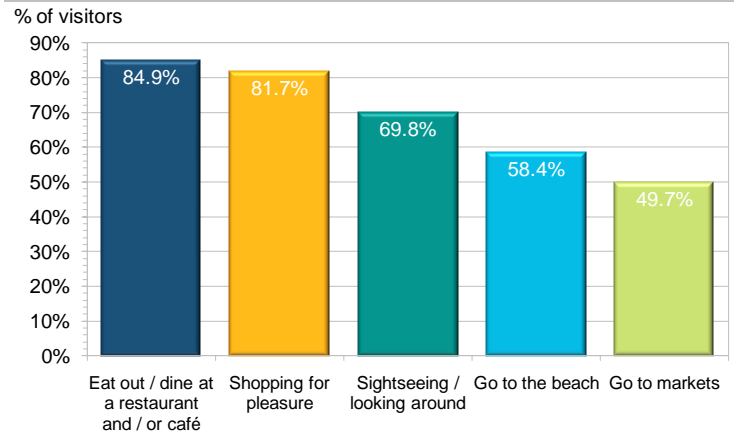
'25 to 34 years' (34.2%) was the biggest age group of Thai overnight visitors to NSW, followed by '45 to 54 years' (22.8%) and '35 to 44 years' (19.3%).

### Top 5 information sources



The 'internet' (49.8%) was the most popular information source for the trip to Australia by Thai overnight visitors who had been to NSW. 'Friend or relative living in Australia' (16.8%) was the 2<sup>nd</sup> most popular, followed by 'travel agent' (16.4%) and 'previous visit(s)' (9.6%).

### Top 5 activities in Australia



'Eat out / dine at a restaurant and / or café' (84.9%) was the most popular activity undertaken during the trip to Australia by Thai overnight visitors who had been to NSW. 'Shopping for pleasure' (81.7%) was the 2<sup>nd</sup> most popular activity, followed by 'sightseeing / looking around' (69.8%).

### Transport

'Private or company car' (30.7%) was the most common transport used to destinations in NSW by Thai overnight visitors. 'Taxi or chauffeur driven hire car' (25.0%) was the 2<sup>nd</sup> most common, followed by 'aircraft' (22.1%).

### First time or repeat visit

More Thai overnight visitors who had been to NSW (53.1%) were on a repeat visit to Australia.

### Travel package

Over 1/10 (10.2%) of Thai overnight visitors who had been to the State, arrived in Australia on a travel package. 'All accommodation' (93.6%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'most ground transport within Australia' (64.4%).

### Group tours

The rate of group tour travel to Australia, amongst Thai overnight visitors who had been to NSW, was 5.8%.

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

| Destination     | Total (\$ million) | Per visitor \$ | Per night \$ |
|-----------------|--------------------|----------------|--------------|
| New South Wales | \$145              | \$3,908        | \$98         |
| Australia       | \$376              | \$4,803        | \$91         |

Thai overnight visitors spent \$145 million in NSW. In total, they spent \$376 million in Australia.

On average, visitors from Thailand spent \$3,908 per visitor and \$98 per night in NSW.

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

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

Thai visitors to Australia are expected to increase from 82,000\* in 2009 to 129,000\* in 2020, an average annual growth rate of 4.3%.

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