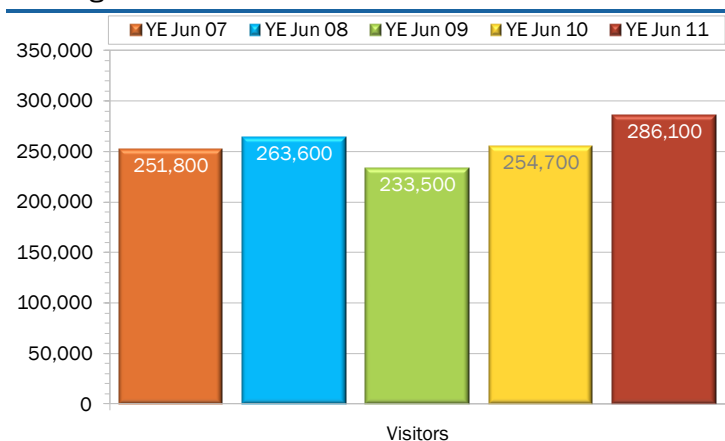


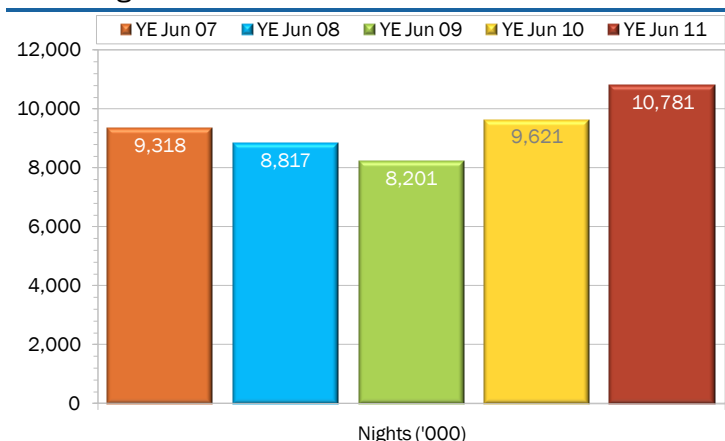
Overnight visitors



NSW received 286,100 overnight visitors from Mainland China - up by 12.3%* on YE Jun 10. This market contributed 10.2% of visitors to the State - up by 1.0% point on YE Jun 10.

Note: The China outbound market is one of the fastest growing in the world, with rapidly rising income and diminishing restrictions on foreign travel. Direct aviation capacity on the China to Australia route increased strongly in 2008. The GFC and the Swine Flu outbreak affected demand for outbound travel in 2009.

Visitor nights



Visitors from Mainland China spent 10.8 million nights in NSW - up by 12.1% on YE Jun 10. This market contributed 16.0% of visitor nights in the State - up by 0.8% points on YE Jun 10.

Market share

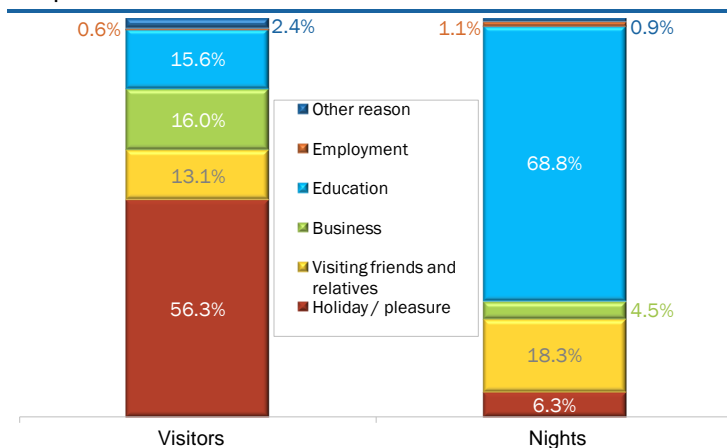
NSW received 60.3% of visitors and 42.8% of nights by Chinese travellers in Australia. Compared to YE Jun 10, the share of visitors was down by 7.4% points and the share of nights was unchanged.

Accommodation

'Rented house / apartment / unit / flat' (62.7%) was the most popular accommodation type used by Chinese visitors for nights in NSW. 'Home of friend or relative' (20.4%) was the 2nd most popular, followed by 'homestay' (6.1%).

'Holiday / pleasure' visitors from Mainland China spent more nights in NSW in a 'standard hotel / motel / motor inn, below 4 star' (30.7%) than in any other accommodation. 'Luxury hotel / serviced apartment / resort, 4 to 5 star' (28.3%) was the 2nd most popular, followed by 'home of friend or relative' (16.2%).

Purpose of visit



'Holiday / pleasure' (56.3%) was the largest purpose for Chinese visitors to the State. 'Business' (16.0%) was the 2nd largest, followed by 'education' (15.6%). Compared to YE Jun 10, visitors who travelled for 'holiday or leisure' grew by 9.9%, 'business' increased by 38.9%* and 'education' grew by 10.7%.

'Education' (68.8%) was the largest purpose in terms of nights by Chinese visitors in NSW. 'Visiting friends and relatives (VFR)' (18.3%) was the 2nd largest, followed by 'holiday / pleasure' (6.3%). Compared to YE Jun 10, nights spent for 'education' grew by 11.5%, 'VFR' increased by 4.5% and 'holiday or leisure' grew by 27.5%.

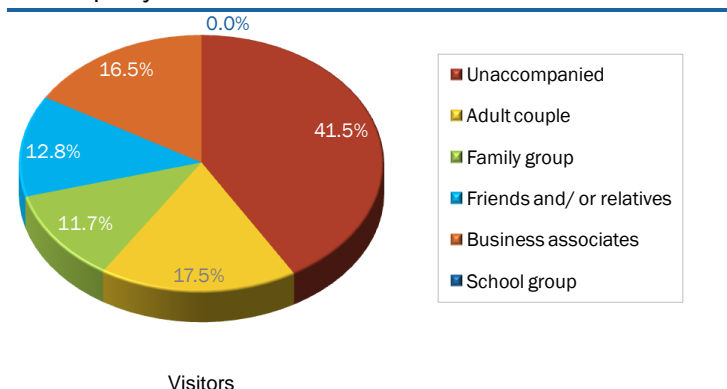
Length of stay

Purpose of visit	Ave length of stay (nights)		Median stay (nights)	
	NSW	Australia	NSW	Australia
Holiday / pleasure	4.2	9.9	3	6
Visiting friends and relatives	52.8	63.3	23	39
Business	10.6	17.3	4	7
Education	166.3	172.4	163	168
Employment	72.8	125.5	56	90
Other reason	14.7	19.9	3	8
Total	37.7	53.0	3	10

Visitors from Mainland China stayed, on average, 37.7 nights in NSW, while their average stay in Australia was 53 nights. The median length of stay in the State was 3 nights, compared to 10 nights in Australia.

'Holiday / pleasure' visitors from Mainland China had an average stay of 4.2 nights & a median stay of 3 nights in NSW.

Travel party



'Unaccompanied' (41.5%) was the most common travel party description for Chinese overnight visitors to the State.

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.

Mainland China Market Profile

Year ended June 2011

Visitors to NSW	286,100
Nights in NSW (million)	10.8
Expenditure in NSW (million)	\$ 1,199
Expenditure per visitor in NSW	\$4,191

Top 5 places visited in NSW

Rank	Region	% of visitors to NSW
1	Sydney	96.8%
2	Illawarra sub-region	2.0%
3	The Hunter	1.7%
4	Mid North Coast	0.6%
5	Blue Mountains	0.6%

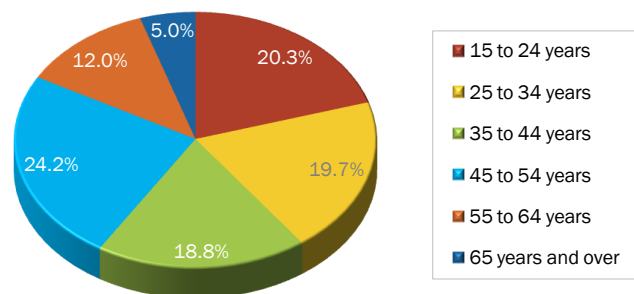
'Sydney' (96.8%) was by far the most visited region in NSW by Chinese overnight visitors. 'Illawarra sub-region' (2.0%) was the 2nd most visited region, followed by 'The Hunter' (1.7%)

Chinese overnight visitors to Australia: 'Sydney' (58.4%) was the most visited region, followed by 'Melbourne' (49.2%) and 'Gold Coast' (24.8%).

Gender

A larger proportion of Chinese overnight visitors to the State were male (51.4%) than female (48.6%).

Age



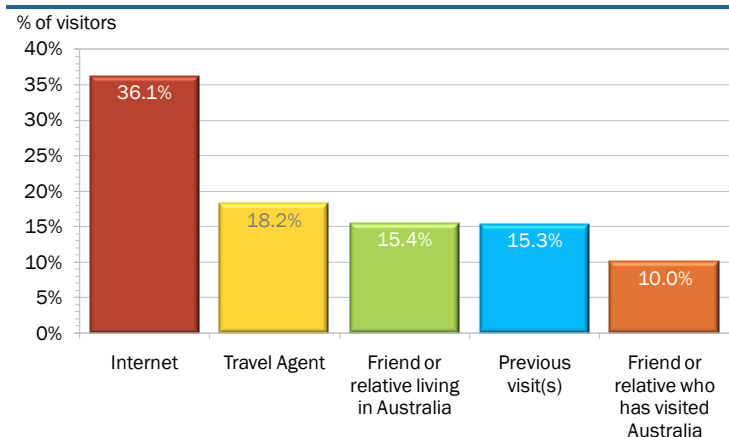
Visitors

'45 to 54 years' (24.2%) was the biggest age group of Chinese overnight visitors to NSW, followed by '15 to 24 years' (20.3%) and '25 to 34 years' (19.7%).

Transport

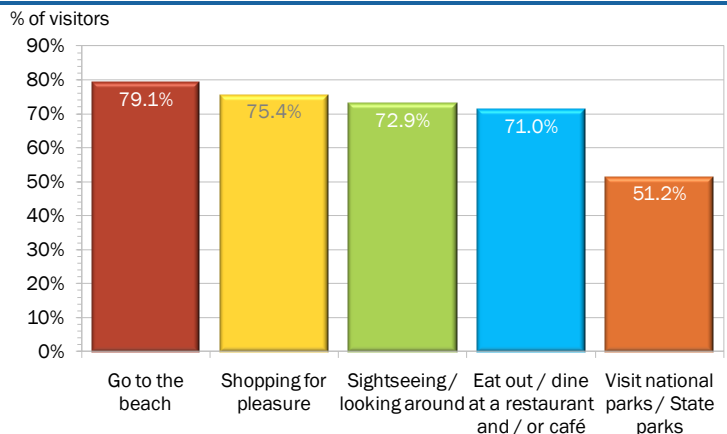
'Aircraft' (33.1%) was the most common transport used to destinations in NSW by Chinese overnight visitors. 'Private or company car' (27.3%) was the 2nd most common, followed by 'charter or tour bus' (26.0%).

Top 5 information sources



The 'internet' (36.1%) was the most popular information source for the trip to Australia by Chinese overnight visitors who had been to NSW. 'Travel agent' (18.2%) was the 2nd most popular.

Top 5 activities in Australia



'Go to the beach' (79.1%) was the most popular activity undertaken during the trip to Australia by Chinese overnight visitors who had been to NSW. 'Shopping for pleasure' (75.4%) was the 2nd most popular activity.

First time or repeat visit

Most Chinese overnight visitors who had been to NSW (56.7%) were visiting Australia for the first time.

Travel package

Over 2/5 (44.1%) of Chinese overnight visitors who had been to the State, arrived in Australia on a travel package. 'All accommodation' (92.8%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'most meals within Australia' (88.9%) and 'most ground transport within Australia' (86.2%).

Group tours

The rate of group tour travel to Australia, amongst Chinese overnight visitors who had been to NSW, was 42.1%.

Expenditure (incl package expenditure) ⁽¹⁾

Expenditure	Destination			
	New South Wales		Australia	
	YE Jun 10	YE Jun 11	YE Jun 10	YE Jun 11
Total (\$ million)	\$1,070	\$1,199	\$2,263	\$2,674
Per visitors (\$)	\$4,201	\$4,191	\$6,009	\$5,634
Per night (\$)	\$111	\$111	\$101	\$106

Chinese overnight visitors spent almost \$1.2 billion in NSW – up by 12.1% on YE Jun 10. On average, they spent \$4,191 per visitor and \$111 per night in the State.

In total, visitors from Mainland China spent nearly \$2.7 billion in Australia – up by 18.2%* on YE Jun 10.

(1) 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

Forecast ⁽²⁾

Chinese visitors to Australia are expected to increase from 454,000# in 2010 to 908,000# in 2020, an average annual growth rate of 7.2%.

(2) Source: Forecast 2011 Issue 1, Tourism Forecasting Committee
Includes children less than 15 years

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.

Source: International Visitor Survey, YE Jun 11, Tourism Research Australia (TRA) – unless otherwise indicated

www.tourism.nsw.gov.au