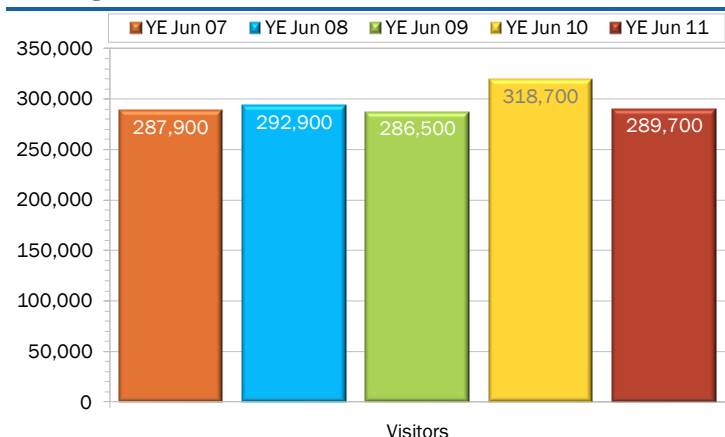


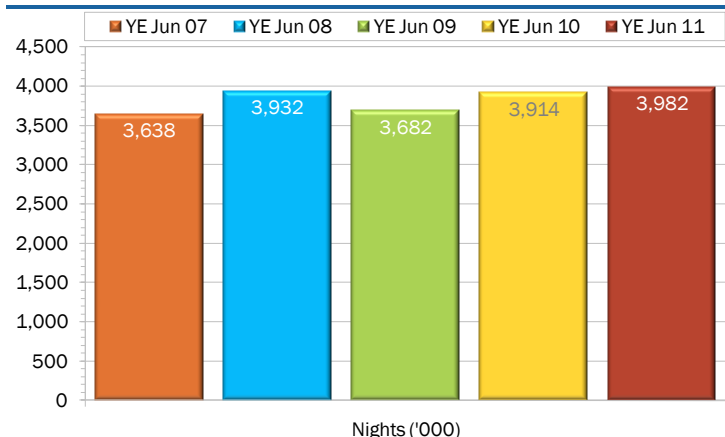
Overnight visitors



NSW received 289,700 overnight visitors from the USA - down by 9.1%* on YE Jun 10. The US contributed 10.3% of visitors to the State - down by 1.2% points on YE Jun 10.

Note: Aviation capacity has been a key constraint to growth in the US inbound market. The 2008 'open skies' agreement has led to increased competition, new entrants on the trans-Pacific (US) route and cheaper airfares. In 2009, there was strong growth in direct aviation capacity between the US and Australia.

Visitor nights



Visitors from the USA spent nearly 4.0 million nights in NSW - up by 1.8% on YE Jun 10. The US contributed 5.9% of visitor nights in the State - down by 0.3% points on YE Jun 10.

Market share

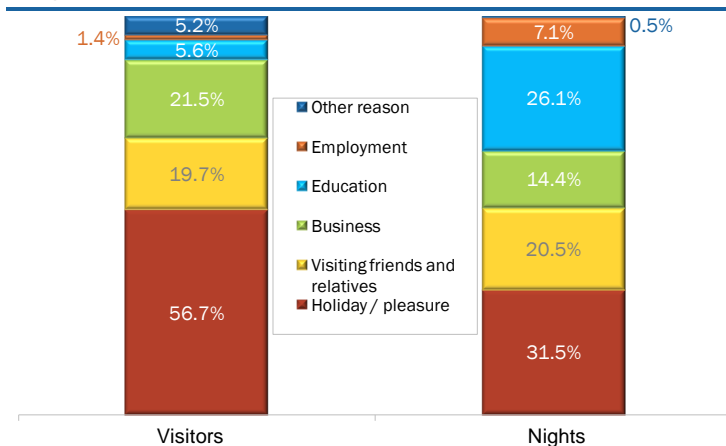
NSW received 66.6% of visitors and 40.7% of nights by US travellers in Australia. Compared to YE Jun 10, the share of visitors was down by 2.7% points and the share of nights was up by 2.1% points.

Accommodation

'Rented house / apartment / unit / flat' (26.8%) was the most popular accommodation type used by US visitors for nights in NSW. 'Home of friend or relative' (26.1%) was the 2nd most popular, followed by 'luxury hotel / serviced apartment / resort, 4 or 5 star' (11.8%).

'Holiday / pleasure' visitors from the USA spent more nights in NSW in a 'luxury hotel / serviced apartment / resort, 4 to 5 star' (20.8%) than in any other accommodation, followed by 'home of friend or relative' (19.1%) and 'standard hotel / motel / motor inn, below 4 star' (17.5%).

Purpose of visit



'Holiday / pleasure' (56.7%) was the largest purpose for US visitors to the State. 'Business' (21.5%) was the 2nd largest, followed by 'visiting friends and relatives (VFR)' (19.7%). Compared to YE Jun 10, visitors who travelled for 'holiday or leisure' declined by 11.5%*, 'business' grew by 0.6% 'while VFR' decreased by 9.8%.

'Holiday / pleasure' (31.5%) was the largest purpose in terms of nights by US visitors in NSW. 'Education' (26.1%) was the 2nd largest, followed by 'VFR' (20.5%). Compared to YE Jun 10, nights spent for 'holiday or leisure' declined by 12.6%, 'education' grew by 7.6% and 'VFR' decreased by 6.9%.

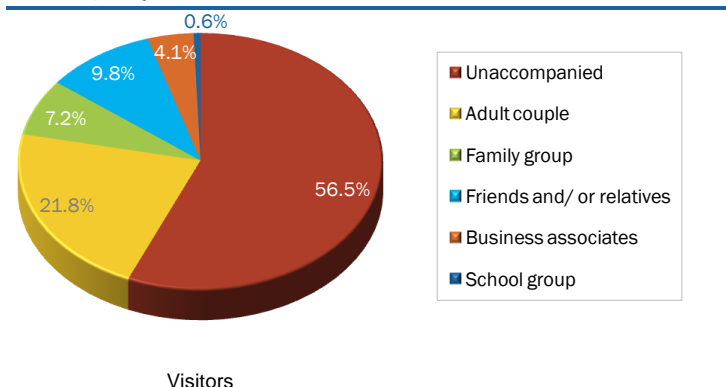
Length of stay

Purpose of visit	Ave length of stay (nights)		Median stay (nights)	
	NSW	Australia	NSW	Australia
Holiday / pleasure	7.6	18.0	5	11
Visiting friends and relatives	14.3	22.4	11	14
Business	9.2	13.7	5	8
Education	63.6	75.8	49	55
Employment	68.3	74.1	24	40
Other reason	1.3	7.4	3	1
Total	13.7	22.5	5	11

Visitors from the USA stayed, on average, 13.7 nights in NSW, while their average stay in Australia was 22.5 nights. The median length of stay in the State was 5 nights, compared to 11 nights in Australia.

'Holiday / pleasure' visitors from the USA had an average stay of 7.6 nights and a median stay of 5 nights in NSW.

Travel party



'Unaccompanied' (56.5%) was the most common travel party description for US 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.

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

USA Market Profile

Year ended June 2011

Visitors to NSW	289,700
Nights in NSW (million)	4.0
Expenditure in NSW (million)	\$516
Expenditure per visitor in NSW	\$1,781

Top 5 places visited in NSW

Rank	Region	% of visitors to NSW
1	Sydney	93.0%
2	The Hunter	5.7%
3	Northern Rivers	5.0%
4	Mid North Coast	3.9%
5	South Coast sub-region	2.7%

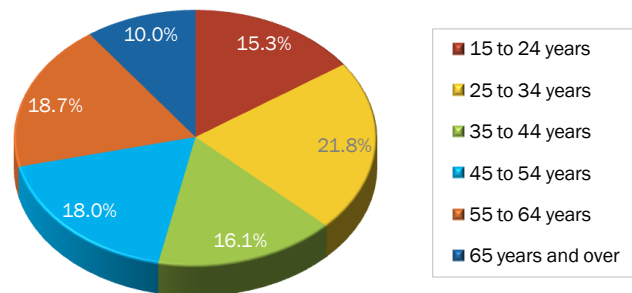
'Sydney' (93.0%) was by far the most visited region in NSW by US overnight visitors. 'The Hunter' (5.7%) was the 2nd most visited region, followed by 'Northern Rivers' (5.0%).

US overnight visitors to Australia: 'Sydney' (62.0%) was the most visited region, followed by 'Melbourne' (27.2%) and 'Tropical North Queensland' (17.8%).

Gender

A larger proportion of US overnight visitors to the State were male (52.4%) than female (47.6%).

Age



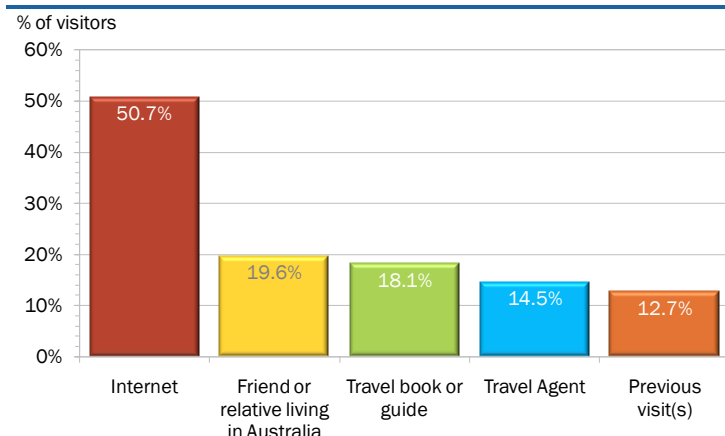
Visitors

'25 to 34 years' (21.8%) was the biggest age group of US overnight visitors to NSW, followed by '55 to 64 years' (18.7%) and '45 to 54 years' (18.0%).

Transport

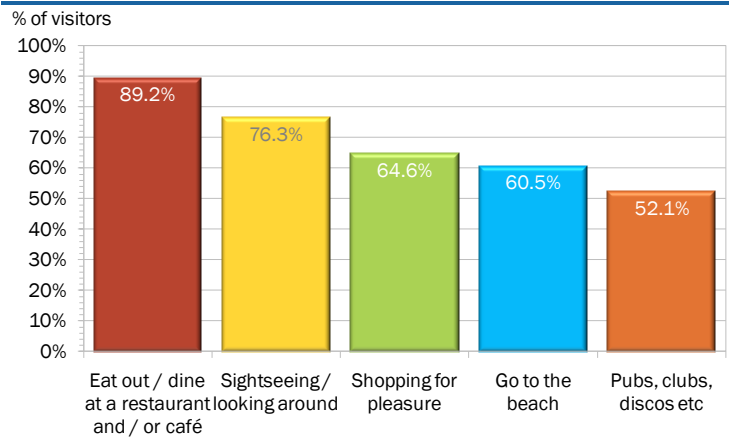
'Aircraft' (36.7%) was the most common transport used to destinations in NSW by US overnight visitors. 'Taxi or chauffeur driven hire car' (23.0%) was the 2nd most common, followed by 'private or company car' (21.2%).

Top 5 information sources



The 'internet' (50.7%) was the most popular information source for the trip to Australia by US overnight visitors who had been to NSW, followed by 'friend or relative living in Australia' (19.6%).

Top 5 activities in Australia



'Eat out / dine at a restaurant and / or cafe' (89.2%) was the most popular activity undertaken during the trip to Australia by US overnight visitors who had been to NSW. 'Sightseeing / looking around' (76.3%) was the 2nd most popular activity, followed by 'shopping for pleasure' (64.6%).

First time or repeat visit

Most US overnight visitors who had been to NSW (59.9%) were visiting Australia for the first time.

Travel package

Nearly 1/5 (16.5%) of US overnight visitors who had been to the State, arrived in Australia on a travel package. 'All accommodation' (75.2%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'airfares within Australia' (56.2%).

Group tours

The rate of group tour travel to Australia, amongst US overnight visitors who had been to NSW, was 7.4%.

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)	\$547	\$516	\$1,252	\$1,196
Per visitors (\$)	\$1,716	\$1,781	\$2,726	\$2,752
Per night (\$)	\$140	\$130	\$124	\$122

US overnight visitors spent \$516 million in NSW – down by 5.7% on YE Jun 10. On average, they spent \$1,781 per visitor and \$130 per night in the State.

In total, visitors from the USA spent almost \$1.2 billion in Australia – down by 4.5% 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⁾

US visitors to Australia are expected to increase from 472,000[#] in 2010 to 652,000[#] in 2020, an average annual growth rate of 3.3%.

(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

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