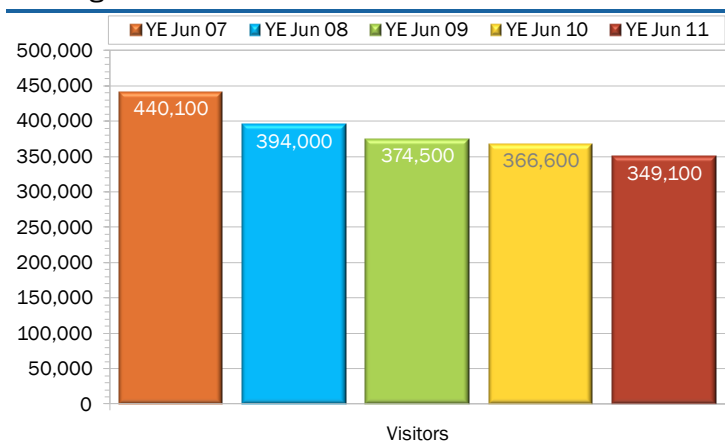


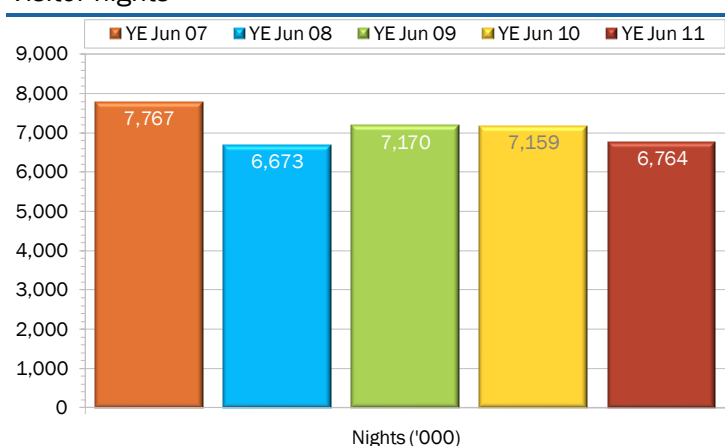
Overnight visitors



NSW received 349,100 overnight visitors from the United Kingdom - down by 4.8% on YE Jun 10. The UK contributed 12.4% of visitors to the State - down by 0.8 pts on YE Jun 10.

Note: The GFC and the fall in the British Pound against other currencies have affected travel from United Kingdom to Australia. The Icelandic volcanic ash cloud led to a reduction in arrivals from United Kingdom in the month of April 2010.

Visitor nights



Visitors from the UK spent nearly 6.8 million nights in NSW - down by 5.5% on YE Jun 10. The UK contributed 10.0% of visitor nights in the State - down by 1.3 points on YE Jun 10.

Market share

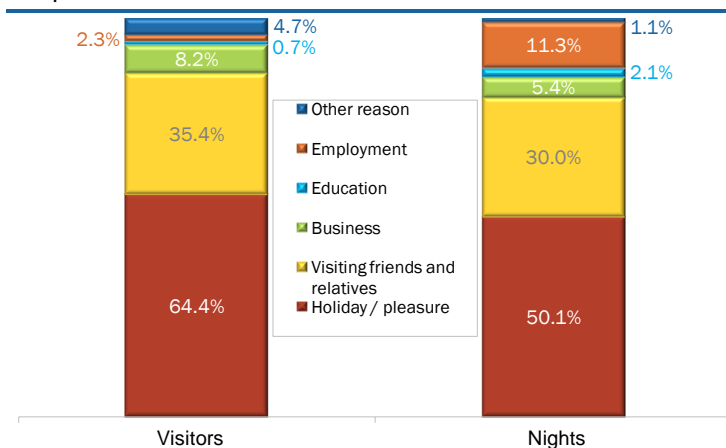
NSW received 58.6% of visitors and 32.0% of nights by UK travellers in Australia. Compared to YE Jun 10, the share of visitors was down by 1.0% point and the share of nights was up by 0.1% point.

Accommodation

'Home of friend or relative' (36.5%) was the most popular accommodation type used by UK visitors for nights in NSW. 'Rented house / apartment / unit / flat' (23.7%) was the 2nd most popular, followed by 'backpacker / hostel' (17.3%) and 'standard hotel / motel / motor inn, below 4 star' (7.4%).

'Holiday / pleasure' visitors from the United Kingdom spent more nights in NSW in a 'backpacker / hostel' (29.8%) than in any other accommodation. 'Rented house / apartment / unit / flat' (24.4%) was the 2nd most popular accommodation, followed by 'home of friend or relative' (15.9%).

Purpose of visit



'Holiday / pleasure' (64.4%) was the largest purpose for UK visitors to the State. 'Visiting friends and relatives (VFR)' (35.4%) was the 2nd largest, followed by 'business' (8.2%). Compared to YE Jun 10, visitors who travelled for 'holiday or leisure' declined by 9.0%, 'VFR' decreased by 1.4% while 'business' grew by 16.8%.

'Holiday / pleasure' (50.1%) was the largest purpose in terms of nights by UK visitors in NSW. 'VFR' (30.0%) was the 2nd largest, followed by 'employment' (11.3%). Compared to YE Jun 10, nights spent for 'holiday or leisure' declined by 16.9%, 'VFR' decreased by 2.5% while 'employment' grew by 48.6%*.

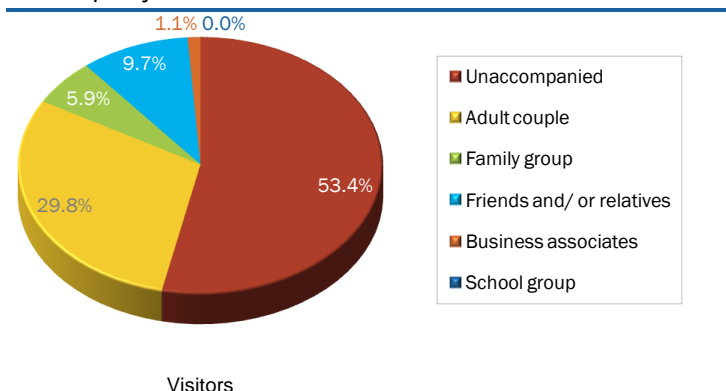
Length of stay

| Purpose of visit | Ave length of stay (nights) | | Median stay (nights) | |
|--------------------------------|-----------------------------|-----------|----------------------|-----------|
| | NSW | Australia | NSW | Australia |
| Holiday / pleasure | 15.1 | 38.1 | 8 | 20 |
| Visiting friends and relatives | 16.4 | 27.5 | 13 | 20 |
| Business | 12.7 | 20.8 | 7 | 10 |
| Education | 57.8 | 84.9 | 43 | 59 |
| Employment | 96.1 | 121.8 | 69 | 95 |
| Other reason | 4.3 | 43.3 | 4 | 7 |
| Total | 19.4 | 35.5 | 8 | 20 |

Visitors from the United Kingdom stayed, on average, 19.4 nights in NSW, while their average stay in Australia was 35.5 nights. The median length of stay in the State was 8 nights, compared to 20 nights in Australia.

'Holiday / pleasure' visitors from the United Kingdom had an average stay of 15.1 nights & a median stay of 8 nights in NSW.

Travel party



'Unaccompanied' (53.4%) was the most common travel party description for UK 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.

United Kingdom Market Profile

Year ended June 2011

| | |
|--------------------------------|---------|
| Visitors to NSW | 349,100 |
| Nights in NSW (million) | 6.8 |
| Expenditure in NSW (million) | \$593 |
| Expenditure per visitor in NSW | \$1,699 |

Top 5 places visited in NSW

| Rank | Region | % of visitors to NSW |
|------|------------------------|----------------------|
| 1 | Sydney | 92.3% |
| 2 | Northern Rivers | 16.8% |
| 3 | Mid North Coast | 10.3% |
| 4 | The Hunter | 7.2% |
| 5 | South Coast sub-region | 5.5% |

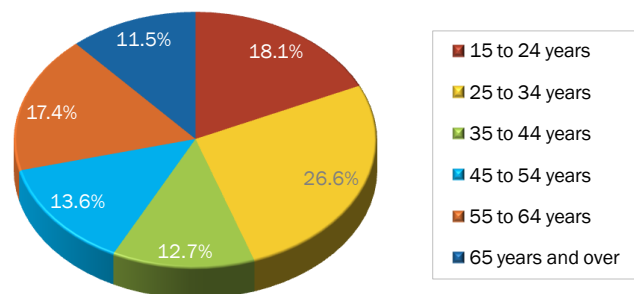
'Sydney' (92.3%) was by far the most visited region in NSW by UK overnight visitors. 'Northern Rivers' (16.8%) was the 2nd most visited region, followed by 'Mid North Coast' (10.3%).

UK overnight visitors to Australia: 'Sydney' (54.1%) was the most visited region, followed by 'Melbourne' (30.3%) and 'Experience Perth' (24.3%).

Gender

A larger proportion of UK overnight visitors to the State were male (52.2%) than female (47.8%).

Age



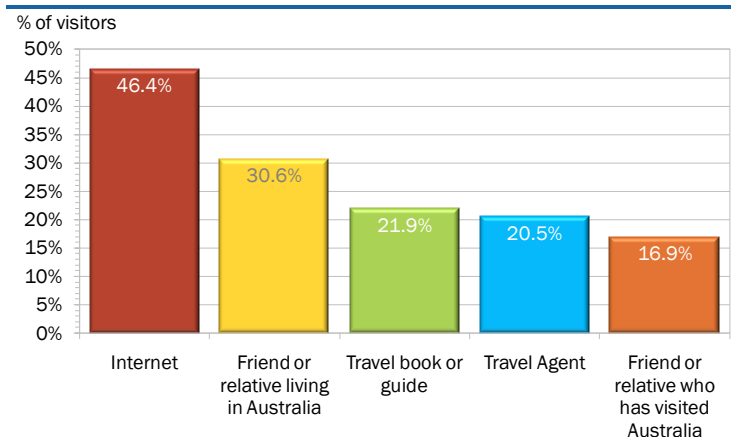
Visitors

'25 to 34 years' (26.6%) was the biggest age group of UK overnight visitors to NSW, followed by '15 to 24 years' (18.1%) and '55 to 64 years' (17.4%).

Transport

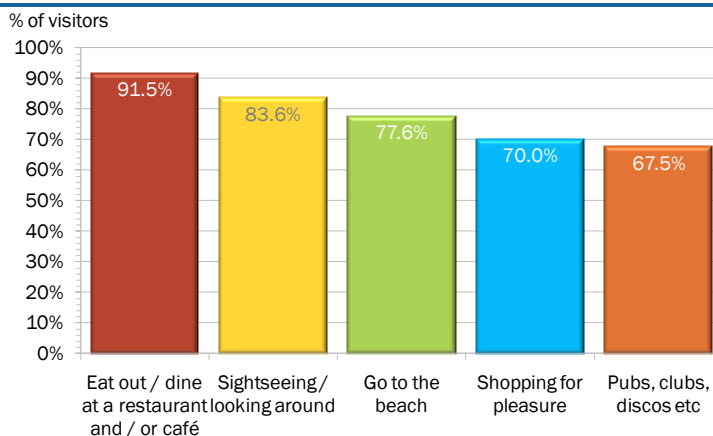
'Aircraft' (36.3%) was the most common transport used to destinations in NSW by UK overnight visitors. 'Private or company car' (29.8%) was the 2nd most common, followed by 'local public transport' (17.2%).

Top 5 information sources



The 'internet' (46.4%) was the most popular information source for the trip to Australia by UK overnight visitors who had been to NSW, followed by 'friend or relative living in Australia' (30.6%).

Top 5 activities in Australia



'Eat out / dine at a restaurant and / or cafe' (91.5%) was the most popular activity undertaken during the trip to Australia by UK overnight visitors who had been to NSW. 'Sightseeing / looking around' (83.6%) was the 2nd most popular activity, followed by 'go to the beach' (77.6%).

First time or repeat visit

Most UK overnight visitors who had been to NSW (50.8%) were on a repeat visit to Australia.

Travel package

Over 1/8 (14.2%) of UK overnight visitors who had been to the State, arrived in Australia on a travel package. 'Airlines within Australia' (59.4%) was the most popular travel arrangement included in the package (other than 'international airlines'), followed by 'all accommodation' (54.9%).

Group tours

The rate of group tour travel to Australia, amongst UK overnight visitors who had been to NSW, was 1.8%.

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) | \$623 | \$593 | \$1,832 | \$1,720 |
| Per visitors (\$) | \$1,699 | \$1,699 | \$2,981 | \$2,888 |
| Per night (\$) | \$87 | \$88 | \$82 | \$81 |

UK overnight visitors spent \$593 million in NSW – down by 4.8% on YE Jun 10. On average, they spent \$1,699 per visitor and \$88 per night in the State.

In total, visitors from the United Kingdom spent over \$1.7 billion in Australia – down by 6.1% 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⁾

UK visitors to Australia are expected to increase from 647,000# in 2010 to 810,000# in 2020, an average annual growth rate of 2.3%.

(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