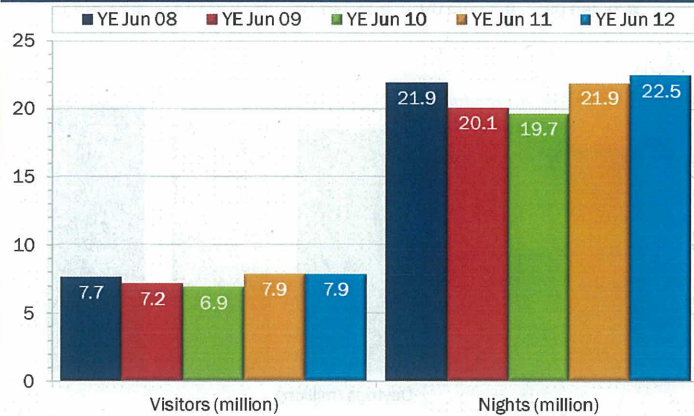


Domestic Overnight Travel ⁽¹⁾

26/10/12 @ 9.07am

Visitors and nights



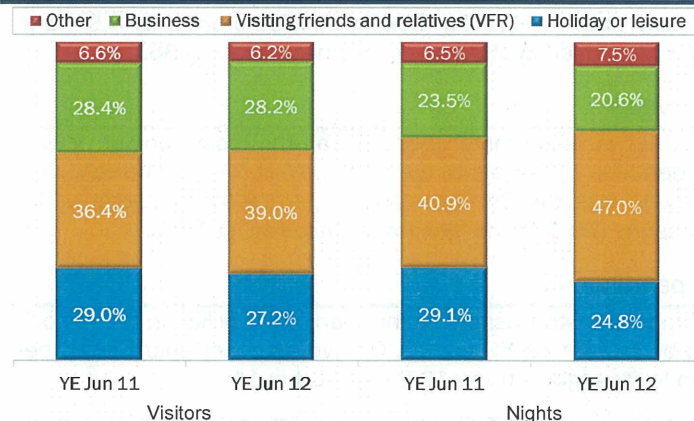
Sydney received over 7.9 million domestic overnight visitors - down by 0.1% on YE Jun 11. Visitors spent nearly 22.5 million nights in the region - up by 2.6% on YE Jun 11.

Note: The number of domestic overnight trips to New South Wales increased by 0.9 percent on last year and by 1.8 percent compared to four years ago.

Market share

The region received 31.8% of visitors and 26.6% of nights in NSW. Compared to YE Jun 11, the share of visitors was down by 0.3% pts and the share of nights was up by 0.2% pts.

Purpose of visit to the region



'Visiting friends and relatives (VFR)' (39.0%) was the largest purpose for visitors to the region, followed by 'business' (28.2%) and 'holiday or leisure' (27.2%). Compared to YE Jun 11, visitors who travelled for 'holiday or leisure' declined by 6.2% while 'VFR' grew by 7.0% and 'business' decreased by 0.8%.

'VFR' (47.0%) was the largest purpose in terms of nights in the region, followed by 'holiday or leisure' (24.8%) and 'business' (20.6%). Compared to YE Jun 11, nights spent for 'holiday or leisure' declined by 12.6% while 'VFR' grew by 17.8%* and 'business' decreased by 9.9%.

Accommodation

'Friends or relatives property' (50.5%) was the most popular accommodation used for nights in the region, followed by 'standard hotel, motor inn, below 4 star' (17.2%) and 'luxury hotel or resort, 4 or 5 star' (15.4%).

Origin

| Origin | Share of visitors | | Share of nights | |
|------------------|-------------------|-----------|-----------------|-----------|
| | YE Jun 11 | YE Jun 12 | YE Jun 11 | YE Jun 12 |
| Regional NSW | 40.7% | 42.7% | 34.4% | 38.1% |
| Sydney | 8.9% | 8.7% | 6.2% | 5.5% |
| Total intrastate | 49.6% | 51.4% | 40.7% | 43.6% |
| Victoria | 18.9% | 20.2% | 22.0% | 19.6% |
| Queensland | 16.0% | 12.7% | 19.0% | 16.2% |
| ACT | 6.6% | 6.4% | 5.3% | 4.3% |
| Other interstate | 8.9% | 9.3% | 13.1% | 16.3% |
| Total interstate | 50.4% | 48.6% | 59.3% | 56.4% |

Regional NSW (42.7%) was the largest source of visitors to the region, followed by Victoria (20.2%) and Queensland (12.7%). Compared to YE Jun 11, the regional NSW source market grew by 4.9% while Sydney declined by 2.7%. Over the same period, Victoria grew by 7.2% while Queensland declined by 21.0%* and the ACT decreased by 2.9%.

Regional NSW (38.1%) was the largest source market in terms of nights in the region, followed by Victoria (19.6%) and Queensland (16.2%). Compared to YE Jun 11, nights spent by visitors from regional NSW grew by 13.5% while nights from Sydney declined by 9.3%. Over the same period, nights by Victorians declined by 8.9% and Queensland nights decreased by 12.2% while nights by visitors from the ACT fell by 16.6%.

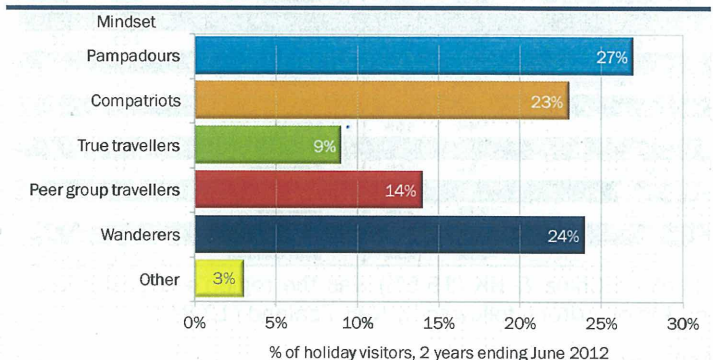
All transport

'Private or company vehicle' (51.3%) was the most popular form of transport used by visitors to the region, followed by 'air transport' (40.0%) and 'railway' (6.9%).

Activities

'Eat out at restaurants' (61.9%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (51.4%) and 'shopping for pleasure' (27.4%).

Australian Travel Mindsets ⁽²⁾



Pampadours - want luxury; Compatriots - mostly families; True travellers - want depth of experience; Peer group travellers - seeking a fun experience with friends; and Wanderers - taking time to explore and discover.

(2) Source: Inside Story, 2YE Jun 12

Expenditure (incl airfares and transport costs) ⁽³⁾

Domestic overnight visitors spent over \$5.6 billion in the region - up by 2.5% on YE Jun 11. On average, visitors spent \$250 per night in the region - unchanged on YE Jun 11.

(3) Source: Modelled domestic overnight visitor expenditure in Australia's regions, YE Jun 11 and YE Jun 12, TRA

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.

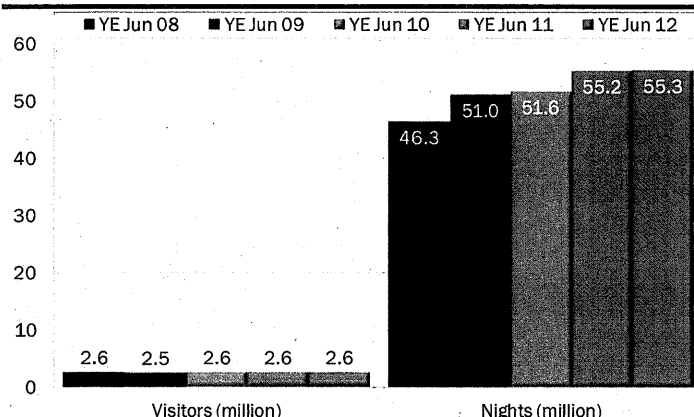
(1) Source: National Visitor Survey (NVS), YE Jun 12, Tourism Research Australia (TRA)

www.destinationnsw.com.au

| | |
|-----------------------------|--------|
| Total visitors (million) | 29.9 |
| Total nights (million) | 77.8 |
| - domestic nights | 28.9% |
| - international nights | 71.1% |
| Total expenditure (billion) | \$13.2 |

International Overnight Travel (4)

Visitors and nights



Sydney received over 2.6 million international overnight visitors - down by 0.6% on YE Jun 11. Visitors spent over 55.3 million nights in the region - up by 0.2% on YE Jun 11.

Note: The number of overnight trips to New South Wales by international visitors decreased by 0.5 percent on last year, but was up by 0.1 percent compared to four years ago.

Market share

The region received 93.4% of visitors and 83.7% of nights in NSW. Compared to YE Jun 11, the share of visitors and the share of nights were down by 0.1 pt each.

Purpose of visit to the region

'Holiday / pleasure' (53.7%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (24.0%) and 'business' (14.4%). Compared to YE Jun 11, visitors who travelled for 'holiday / pleasure' declined by 2.5% while 'VFR' grew by 5.1%* and 'business' decreased by 5.4%.

Origin - share of visitors to the region

| Share of international visitors to Sydney | | | | | | | |
|---|---------------------|-----------|-----------|------|--------------------------|-----------|-----------|
| Rank | Market | YE Jun 11 | YE Jun 12 | Rank | Market | YE Jun 11 | YE Jun 12 |
| 1 | Mainland China & HK | 13.9% | 15.5% | 12 | Indonesia | 1.9% | 2.1% |
| | Mainland China | 10.8% | 12.4% | 13 | Scandinavia | 1.8% | 2.0% |
| | Hong Kong | 3.1% | 3.1% | 14 | Malaysia | 1.6% | 1.8% |
| 2 | New Zealand | 13.0% | 12.8% | 15 | Taiwan | 1.6% | 1.7% |
| 3 | United Kingdom | 12.3% | 10.9% | 16 | Thailand | 1.4% | 1.3% |
| 4 | USA | 10.1% | 10.2% | 17 | Italy | 1.4% | 1.3% |
| 5 | Japan | 5.4% | 5.5% | 18 | Ireland | 1.1% | 1.2% |
| 6 | Korea | 5.6% | 5.5% | 19 | Middle East & Nth Africa | 1.1% | 1.2% |
| 7 | Germany | 3.8% | 3.6% | 20 | Netherlands | 1.0% | 0.9% |
| 8 | Singapore | 3.4% | 3.3% | 21 | Switzerland | 1.1% | 0.8% |
| 9 | Canada | 2.7% | 2.7% | | Other Asia | 2.2% | 2.3% |
| 10 | India | 2.5% | 2.6% | | Other Europe | 2.7% | 2.6% |
| 11 | France | 2.1% | 2.1% | | Other Countries | 6.0% | 6.2% |

Mainland China & HK (15.5%) was the region's largest source market of visitors, followed by New Zealand (12.8%).

Accommodation

'Rented house / apartment / unit / flat' (44.5%) was the most popular form of accommodation used for nights in the region, followed by 'home of friend or relative' (29.4%) and 'backpacker / hostel' (5.8%).

Expenditure (incl pre-paid package expenditure) (5)

International overnight visitors spent over \$5.4 billion in the region - down by 0.1% on YE Jun 11. On average, visitors spent \$98 per night in the region - down by 1.0% on YE Jun 11.

(5) Source: Modelled international overnight visitor expenditure in Australia's regions, YE Jun 11 and YE Jun 12, TRA.

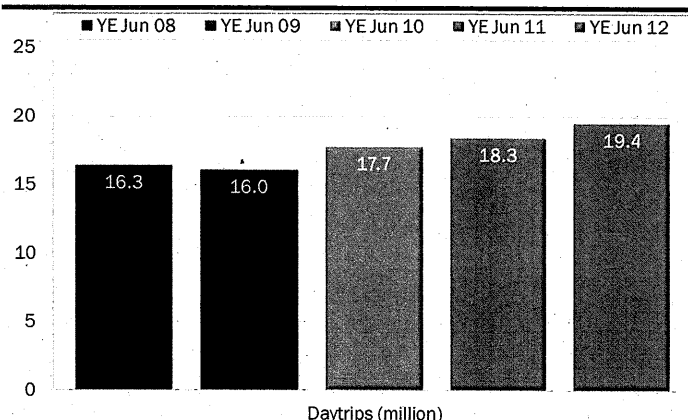
Please note: The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.

(4) Source: International Visitor Survey (IVS), YE Jun 12, TRA

Domestic Daytrip Travel (6)

Daytrips



Sydney received over 19.4 million domestic daytrip visitors - up by 5.9%* on YE Jun 11.

Note: The number of domestic daytrips to New South Wales increased by 7.4 percent* on last year and by 16.9 percent* compared to four years ago.

Market share

The region received 36.1% of daytrips to NSW. Compared to YE Jun 11, the share was down by 0.5% pts.

Main purpose of trip

'Holiday or leisure' (43.4%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives (VFR)' (32.3%) and 'business' (11.7%). Compared to YE Jun 11, visitors who travelled for 'holiday or leisure' grew by 4.9% and 'VFR' increased by 2.7% while 'business' grew by 36.9%*.

Activities

'Eat out at restaurants' (43.1%) was the most popular activity undertaken by visitors to the region. 'Visit friends and relatives' (39.6%) was the 2nd most popular, followed by 'shopping for pleasure' (20.1%) and 'general sightseeing' (12.6%).

Expenditure (7)

Domestic daytrip visitors spent nearly \$2.2 billion in the region - up by 16.6%* on YE Jun 11. On average, they spent \$112 per trip to the region - up by 10.9% on YE Jun 11.

(7) Source: Modelled domestic day visitor expenditure in Australia's regions, YE Jun 11 and YE Jun 12, TRA

Notes and further information

Enhancements to the NVS and the IVS were introduced in 2012. Tourism region boundaries have changed in both surveys with the introduction of the new Australian Statistical Geography Standard.

The NVS has new population benchmarks and the reporting of business expenditure has been improved.

The categories of education and employment in the IVS are now benchmarked separately to the overseas arrivals data collected by the Department of Immigration and Citizenship.

Please see www.destinationnsw.com.au for more information on the enhancements to the IVS and NVS, as well as profiles on travel to the other regions in NSW and information on international and domestic travel to the State.

(6) Source: NVS, YE Jun 12, TRA