

International Travel to NSW

Year ended December 2017

For the period of January 2017 to December 2017

Source: International Visitor Survey (IVS), YE Dec 17, TRA - unless otherwise specified.



Overview

NSW received nearly 4.2 million international overnight visitors - up by 7.4%* on YE Dec 16. Visitors spent over 94.4 million nights in the State - up by 7.9%* on YE Dec 16.

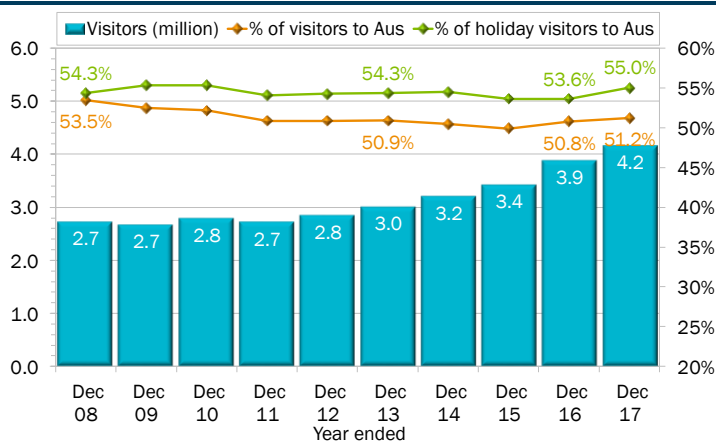
NSW received 51.2% of visitors and 35.6% of nights in Australia. Compared to YE Dec 16, the share of visitors was up by 0.4% pts and the share of nights was up by 1.0% pt.

The average length of stay in NSW was 22.7 nights - up by 0.1 night on YE Dec 16.

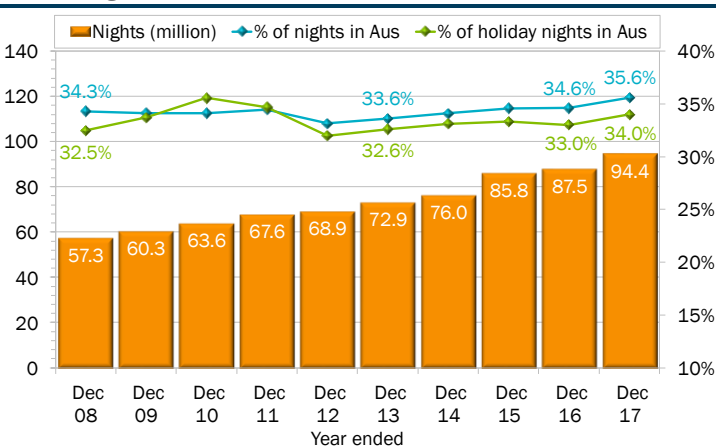
International overnight visitors spent \$10.4 billion in NSW (incl package expenditure) - up by 9.5%* on YE Dec 16. This represented 36.8% of total expenditure in Australia. On average, visitors spent \$2,449 per visitor and \$110 per night in NSW. ⁽¹⁾

⁽¹⁾ Source: TRA's expenditure allocation method applied to IVS data, YE Dec 17.

Overnight visitors



Visitor nights



Forecast

NSW nights are expected to increase from nearly 90.7 million in 2016/17 to nearly 161.6 million in 2026/27, an average annual growth rate of 5.9%. ⁽²⁾

International visitors to Australia are expected to increase from nearly 8.6 million# in 2016/17 to over 15.0 million# in 2026/27, an average annual growth rate of 5.8%. ⁽³⁾

⁽²⁾ Source: State and Territory Tourism Forecasts, 2017, TRA. Note: nights only.

⁽³⁾ Source: Tourism Forecasts, 2017, TRA

Includes children less than 15 years

Origin

Rank	Origin	Visitors ('000)	%	Visitor nights ('000)	Spend in NSW (\$ million)	Average spend per night in NSW	Average length of stay in NSW
1	Mainland China	776	18.7%	19,759	3,233	164	25.5
2	USA	457	11.0%	5,152	774	150	11.3
3	New Zealand	415	10.0%	3,494	465	133	8.4
4	United Kingdom	381	9.2%	8,036	738	92	21.1
5	South Korea	221	5.3%	5,060	598	118	22.9
6	Japan	166	4.0%	3,364	352	105	20.3
7	India	147	3.5%	5,860	337	58	39.7
8	Hong Kong	131	3.2%	2,445	333	136	18.6
9	Germany	130	3.1%	2,687	211	78	20.7
10	Singapore	116	2.8%	1,136	248	218	9.8
11	Canada	99	2.4%	1,642	160	97	16.7
12	Malaysia	87	2.1%	1,672	190	114	19.2
13	Taiwan	86	2.1%	2,915	204	70	34.1
14	Indonesia	74	1.8%	1,760	187	106	23.7
15	France	73	1.8%	2,442	180	74	33.5
16	Philippines	59	1.4%	2,000	127	64	33.7
17	Thailand	45	1.1%	2,261	181	80	49.8
18	Italy	45	1.1%	1,780	130	73	39.8
19	Netherlands	34	0.8%	675	59	87	19.9
20	Switzerland	32	0.8%	534	63	118	16.9
21	Ireland	29	0.7%	818	68	83	28.0
	Other Asia	110	2.6%	4,936	483	98	44.9
	Scandinavia	73	1.8%	1,401	129	92	19.2
	Other Europe	112	2.7%	3,031	265	87	27.0
	Other Countries	260	6.2%	9,548	711	74	36.8
	Total NSW	4,158		94,407	10,424	110	22.7

Mainland China (776,300 or 18.7%) was the largest source market of international visitors to NSW, followed by the USA (457,000 or 11.0%) and New Zealand (414,600 or 10.0%). Compared to YE Dec 16, visitors from Mainland China grew by 13.6%* and US visitors increased by 7.2%* while New Zealand visitors declined by 2.4%.

Mainland China (19.8 million or 20.9%) was the biggest contributor of international visitor nights in the State, followed by the United Kingdom (8.0 million or 8.5%) and India (5.9 million or 6.2%). Compared to YE Dec 16, visitor nights from Mainland China grew by 14.3%* and visitor nights from the United Kingdom increased by 0.3% while Indian nights grew by 19.2%*.

Visitors from Mainland China spent the most in the State (\$3.2 billion), followed by visitors from the USA (\$774 million) and visitors from the United Kingdom (\$738 million). Compared to YE Dec 16, expenditure by Mainland Chinese visitors grew by 17.8%* and spend by visitors from the USA increased by 3.2% while spend by UK visitors declined by 0.1%.

Visitors from Singapore (\$218) had the highest average spend per night in NSW, followed by Mainland Chinese visitors (\$164) and visitors from the USA (\$150).

Visitors from Thailand (49.8 nights) had the longest average stay in NSW, followed by Italian visitors (39.8 nights) and visitors from India (39.7 nights).

Travel package

Nearly 1/5 (18.5%) of international overnight visitors who had been to NSW, arrived in Australia on a travel package. 'All accommodation' (85.2%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'most ground transport within Australia' (72.7%) and 'airfares within Australia' (69.8%).

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.

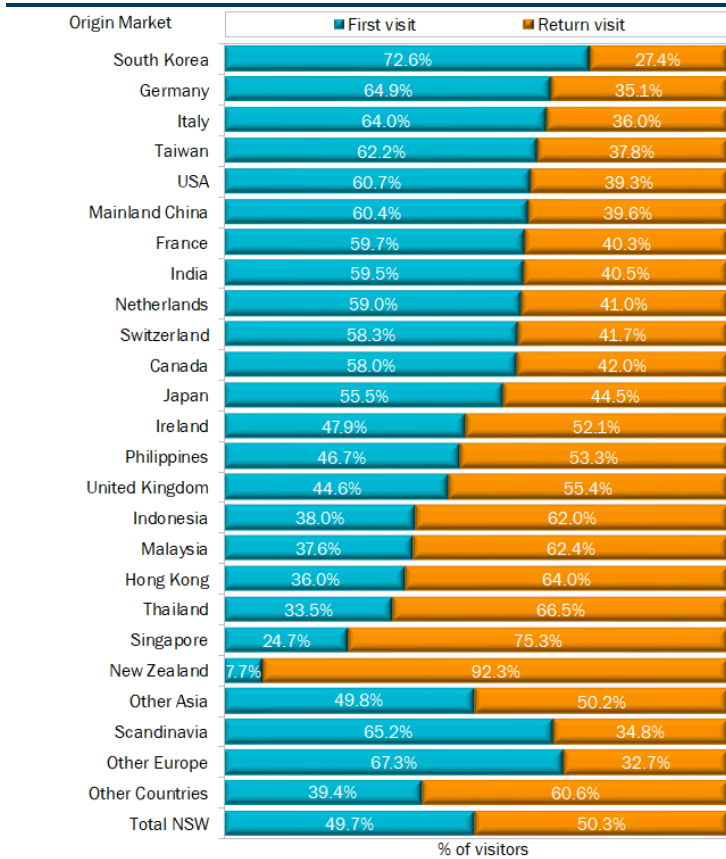
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Year ended December 2017

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First or return visitor



Most international overnight visitors who had been to NSW (50.3%), were on a return trip to Australia.

International overnight visitors who had been to the State:

South Korean visitors (72.6%) had the highest percentage of first time travellers to Australia, followed by visitors from Germany (64.9%) and Italian visitors (64.0%).

New Zealand visitors (92.3%) had the highest proportion of repeat travellers, followed by Singaporeans (75.3%) and visitors from Thailand (66.5%).

Length of stay

Purpose of visit	Ave length of stay (nights)		Median stay (nights)	
	NSW	Australia	NSW	Australia
Holiday	11.7	18.9	4	10
Visiting friends and relatives	22.2	23.0	11	15
Business	7.9	10.2	4	6
Employment	103.3	100.0	84	84
Education	119.4	120.6	109	114
Total other reasons	3.5	3.9	3	10
Total	22.7	32.7	5	10

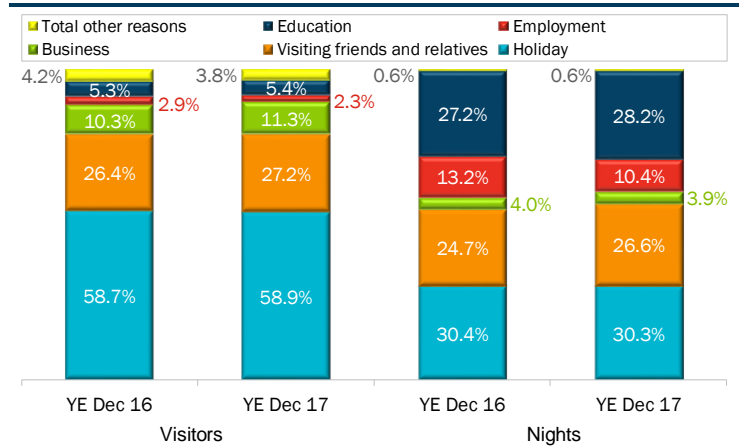
International visitors stayed on average 22.7 nights in NSW, while their average stay in Australia was 32.7 nights. The median length of stay in the State was 5 nights compared to 10 nights in Australia.

Compared to YE Dec 16, the average in NSW was up by 0.1 night and the median stay was unchanged.

Transport in NSW

'Aircraft' (30.2%) was the most popular mode of transport used to destinations in NSW by international overnight visitors. 'Private vehicle or company car' (25.5%) was the 2nd most popular, followed by 'taxi or chauffeur driven hire car' (19.7%).

Purpose of visit to NSW (4)



'Holiday' (58.9%) was the largest purpose of visit for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (27.2%) and 'business' (11.3%). Compared to YE Dec 16, visitors who travelled for 'holiday' grew by 7.7%* and 'VFR' increased by 10.8%* while 'business' grew by 18.6%*.

'Holiday' (30.3%) was the largest purpose in terms of nights by international visitors in the State, followed by 'education' (28.2%) and 'VFR' (26.6%). Compared to YE Dec 16, nights spent for 'holiday' grew by 7.4%* and 'education' increased by 11.9%* while 'VFR' grew by 16.3%*.

Origin of visitors	Holiday (%)	VFR (%)	Business (%)	Employment (%)	Education (%)	Other reasons (%)
Switzerland	80.9	19.6	4.8	0.6	8.6	2.4
South Korea	80.7	10.6	4.7	1.0	4.2	3.5
Germany	80.6	18.1	6.8	1.4	2.1	3.0
Taiwan	75.9	16.4	6.6	3.8	3.9	1.8
Netherlands	74.8	24.9	9.1	1.4	3.9	2.9
France	72.6	23.5	9.0	3.1	4.1	4.9
Mainland China	65.7	17.2	6.1	1.8	10.2	2.9
Malaysia	65.1	25.5	10.8	1.2	4.5	4.0
United Kingdom	63.5	39.0	7.5	3.1	1.0	3.2
Canada	62.5	36.0	8.7	1.3	1.3	4.8
USA	62.0	21.8	14.2	1.5	3.9	6.4
Japan	61.4	17.4	14.4	0.7	6.3	4.8
Italy	60.8	23.9	11.1	3.4	5.5	1.0
Indonesia	55.9	25.4	9.7	1.8	8.3	4.4
Hong Kong	53.4	29.8	16.5	1.3	4.8	0.9
Ireland	51.7	50.6	5.7	2.4	0.2	2.4
Thailand	48.9	32.0	11.8	5.3	11.5	1.3
Singapore	47.7	22.1	29.3	1.1	2.8	1.2
India	44.0	37.9	13.2	7.2	4.3	1.5
Philippines	37.7	42.6	13.0	7.0	4.9	6.4
New Zealand	33.6	41.9	23.4	2.4	1.7	4.6
Other Asia	38.1	45.5	10.4	2.1	13.0	2.1
Scandinavia	74.7	19.2	9.5	1.7	4.9	3.7
Other Europe	63.6	24.1	10.5	4.4	5.0	4.4
Other Countries	44.3	38.8	8.7	2.4	8.4	5.8
Total NSW	58.9	27.2	11.3	2.3	5.4	3.8

Of all international markets to NSW, Switzerland (80.9%) had the highest proportion who visited the State for a holiday, followed by South Korea (80.7%). Visitors from Singapore (29.3%) had the highest percentage who had visited for business, followed by New Zealand (23.4%).

(4) Visitors may have had more than one purpose for visiting NSW

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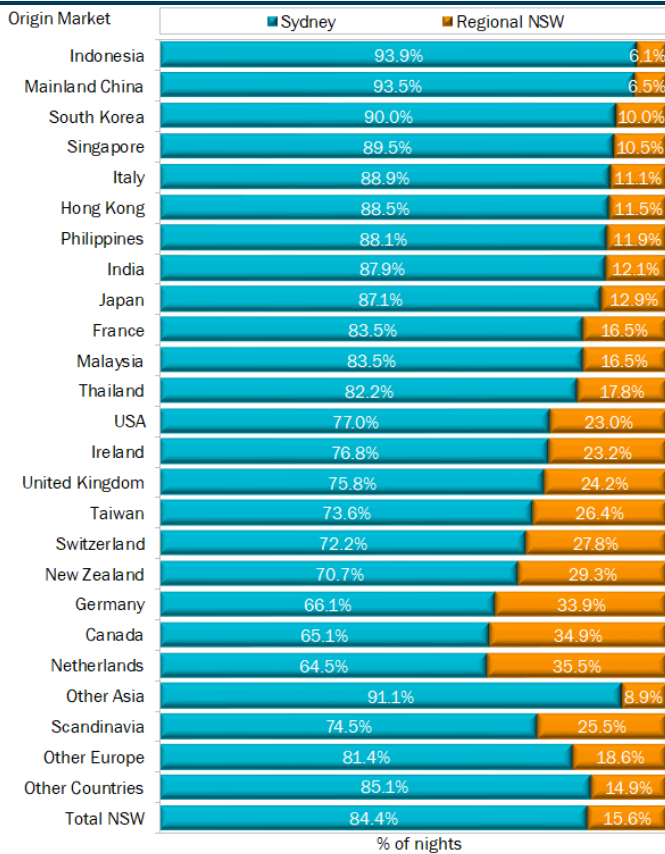
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	YE Dec 17	YE Dec 16	YE on YE growth
Visitors to NSW (million)	4.2	3.9	7.4%
Nights in NSW (million)	94.4	87.5	7.9%
Expenditure in NSW (billion)	\$10.4	\$9.5	9.5%
Expenditure per night in NSW	\$110	\$109	1.5%

Destinations in NSW

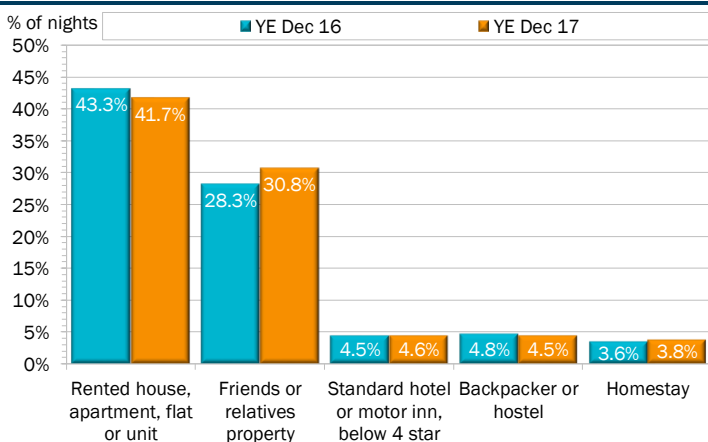


International overnight visitors spent 84.4% of their nights in Sydney – down by 0.3% pts on YE Dec 16.

Visitors from Indonesia (93.9%) had the highest proportion of nights spent in Sydney, followed by Mainland China visitors (93.5%) and South Koreans (90.0%).

Visitors from Netherlands (35.5%) had the highest proportion of nights in regional NSW, followed by Canadian visitors (34.9%) and visitors from Germany (33.9%).

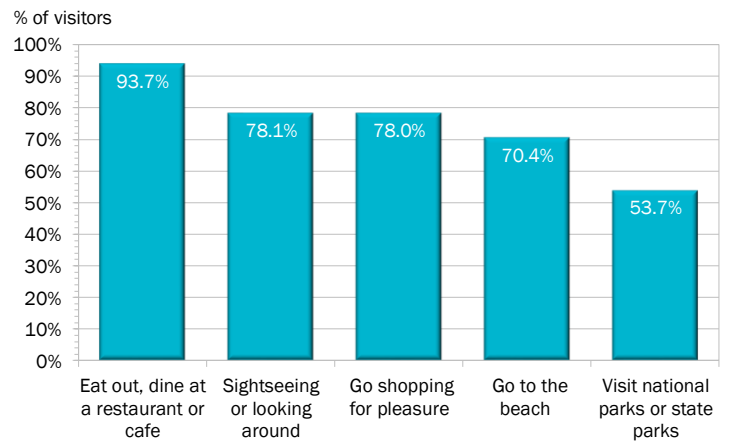
Accommodation in NSW



'Rented house, apartment, flat or unit' (41.7%) was the most popular accommodation type used for nights in NSW by international visitors, followed by 'friends or relatives property' (30.8%) and 'standard hotel or motor inn, below 4 star' (4.6%).

Compared to YE Dec 16, 'friends or relatives property' increased by 2.5% pts while 'rented house, apartment, flat or unit' decreased by 1.6% pts.

Top activities in Australia

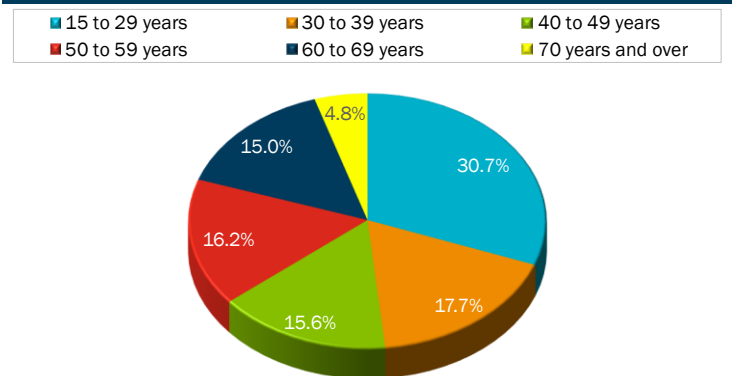


'Eat out, dine at a restaurant or cafe' (93.7%) was the most popular activity undertaken during the trip to Australia by international overnight visitors who had been to NSW. 'Sightseeing or looking around' (78.1%) was the 2nd most popular, followed by 'go shopping for pleasure' (78.0%).

Travel party

Almost ½ (49.7%) of international overnight visitors who had been to NSW arrived in Australia 'alone'. Their 2nd most common travel party description was 'adult couple' (21.6%).

Age groups



'15 to 29 years' (30.7%) was the biggest age group amongst international overnight visitors to NSW, followed by '30 to 39 years' (17.7%) and '50 to 59 years' (16.2%).

Overview - Australia

Australia received over 8.1 million international visitors who spent over 265.2 million nights in Australia – up by 6.5%* and by 4.8%* respectively on YE Dec 16. On average, they stayed for 32.7 nights - down by 0.5 nights on YE Dec 16.

Visitors spent nearly \$28.4 billion (incl package expenditure) while in Australia - up by 8.2%* on YE Dec 16. On average, they spent \$3,494 per visitor and \$107 per night in Australia. ⁽¹⁾

Notes and further information

An international visitor = an international resident, aged 15 and over, who visited Australia for a period of no more than 12 months.

Please see www.destinationnsw.com.au for detailed profiles on each of the NSW top international country markets, domestic visitors to the State and travel to NSW's regions.

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