

International Travel to NSW - preliminary

Year ended March 2018

For the period of April 2017 to March 2018

Source: International Visitor Survey (IVS), YE Mar 18, TRA - unless otherwise specified.



Overview

NSW received over 4.3 million international overnight visitors - up by 8.5%* on YE Mar 17. Visitors spent over 94.5 million nights in the State - up by 5.1%* on YE Mar 17.

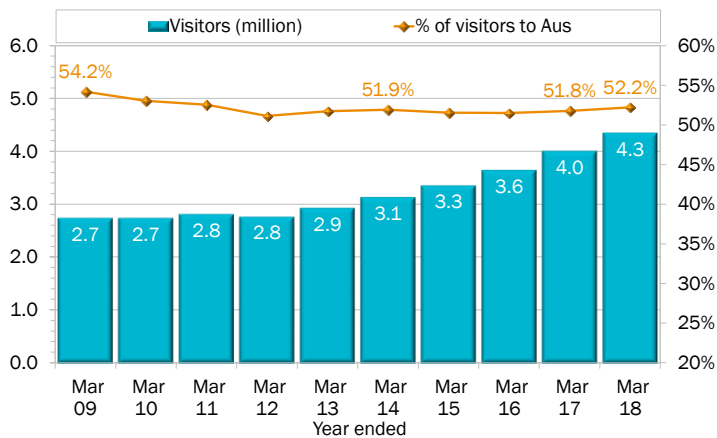
NSW received 52.2% of visitors and 35.1% of nights in Australia. Compared to YE Mar 17, the share of visitors was up by 0.4% pts and the share of nights was up by 0.8% pts.

The average length of stay in NSW was 21.8 nights - down by 0.7 nights on YE Mar 17.

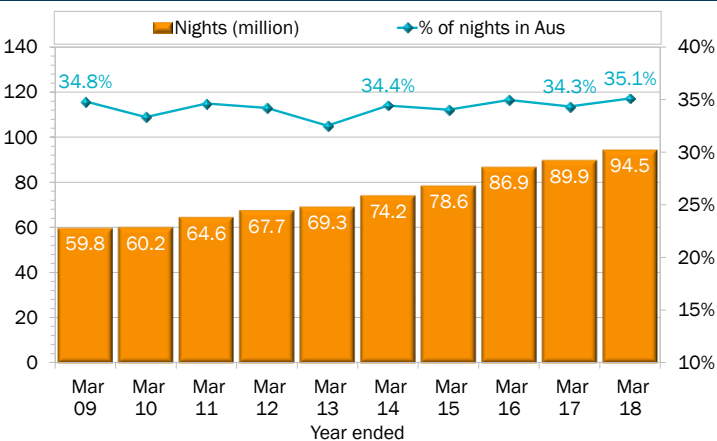
International overnight visitors spent \$10.5 billion in NSW (incl package expenditure) - up by 7.0%* on YE Mar 17. This represented 36.1% of total expenditure in Australia. On average, visitors spent \$2,420 per visitor and \$111 per night in NSW. ⁽¹⁾

(1) Source: TRA's expenditure allocation method applied to IVS data, YE Mar 18.

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	792	18.3%	19,392	3,245	167	24.5
2	USA	494	11.4%	4,916	762	155	10.0
3	New Zealand	445	10.3%	3,596	467	130	8.1
4	United Kingdom	383	8.8%	7,553	701	93	19.7
5	South Korea	222	5.1%	5,690	633	111	25.6
6	Japan	171	3.9%	3,376	358	106	19.7
7	India	158	3.6%	5,954	358	60	37.7
8	Hong Kong	136	3.1%	2,589	347	134	19.0
9	Germany	135	3.1%	2,930	223	76	21.7
10	Singapore	118	2.7%	1,173	245	209	9.9
11	Canada	106	2.4%	1,671	160	96	15.8
12	Taiwan	93	2.1%	2,970	227	76	31.9
13	Malaysia	90	2.1%	1,740	197	113	19.4
14	Indonesia	83	1.9%	1,944	207	107	23.5
15	France	76	1.8%	2,322	171	74	30.4
16	Philippines	63	1.5%	1,916	122	64	30.2
17	Thailand	47	1.1%	2,235	186	83	47.2
18	Italy	45	1.0%	1,773	124	70	39.3
19	Netherlands	35	0.8%	610	58	96	17.4
20	Switzerland	33	0.8%	494	63	127	15.0
21	Ireland	30	0.7%	840	70	83	27.8
	Other Asia	116	2.7%	5,291	491	93	45.5
	Scandinavia	75	1.7%	1,286	131	102	17.2
	Other Europe	115	2.6%	2,991	268	90	26.0
	Other Countries	276	6.4%	9,267	683	74	33.6
	Total NSW	4,338		94,520	10,497	111	21.8

Mainland China (791,900 or 18.3%) was the largest source market of international visitors to NSW, followed by the USA (493,900 or 11.4%) and New Zealand (445,200 or 10.3%). Compared to YE Mar 17, visitors from Mainland China grew by 12.5%* and US visitors increased by 11.0%* while New Zealand visitors grew by 0.9%.

Mainland China (19.4 million or 20.5%) was the biggest contributor of international visitor nights in the State, followed by the United Kingdom (7.6 million or 8.0%) and India (6.0 million or 6.3%). Compared to YE Mar 17, visitor nights from Mainland China grew by 2.3% while visitor nights from the United Kingdom declined by 6.4% and visitor nights from India increased by 11.6%.

Visitors from Mainland China spent the most in the State (\$3.2 billion), followed by visitors from the USA (\$762 million) and visitors from the United Kingdom (\$701 million). Compared to YE Mar 17, expenditure by Mainland Chinese visitors grew by 9.8%* while spend by visitors from the USA declined by 1.7% and spend by UK visitors decreased by 3.8%.

Visitors from Singapore (\$209) had the highest average spend per night in NSW, followed by Mainland Chinese visitors (\$167) and visitors from the USA (\$155).

Visitors from Thailand (47.2 nights) had the longest average stay in NSW, followed by Italian visitors (39.3 nights) and visitors from India (37.7 nights).

Travel package

Nearly 1/5 (18.0%) of international overnight visitors who had been to NSW, arrived in Australia on a travel package. 'All accommodation' (85.9%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'most ground transport within Australia' (71.4%) and 'airfares within Australia' (69.2%).

Please note: Due to quality issues with the incoming passenger data, IVS results for the YE Mar 18 are preliminary.

* The percentage change is statistically significant.

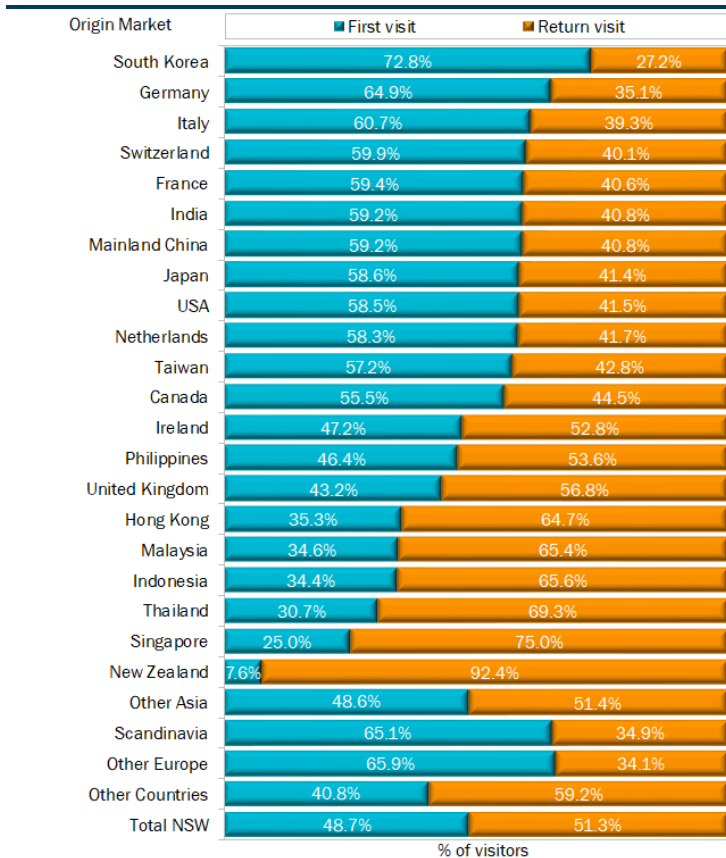
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First or return visitor



Most international overnight visitors who had been to NSW (51.3%), were on a return trip to Australia.

International overnight visitors who had been to the State:

South Korean visitors (72.8%) had the highest percentage of first time travellers to Australia, followed by visitors from Germany (64.9%) and Italian visitors (60.7%).

New Zealand visitors (92.4%) had the highest proportion of repeat travellers, followed by Singaporeans (75.0%) and visitors from Thailand (69.3%).

Length of stay

International visitors stayed on average 21.8 nights in NSW, while their average stay in Australia was 32.4 nights. The median length of stay in the State was 5 nights compared to 10 nights in Australia.

Compared to YE Mar 17, the average in NSW was down by 0.7 nights and the median stay was unchanged.

Transport in NSW

'Aircraft' (29.9%) was the most popular mode of transport used to destinations in NSW by international overnight visitors. 'Private vehicle or company car' (24.8%) was the 2nd most popular, followed by 'taxi or chauffeur driven hire car' (18.8%).

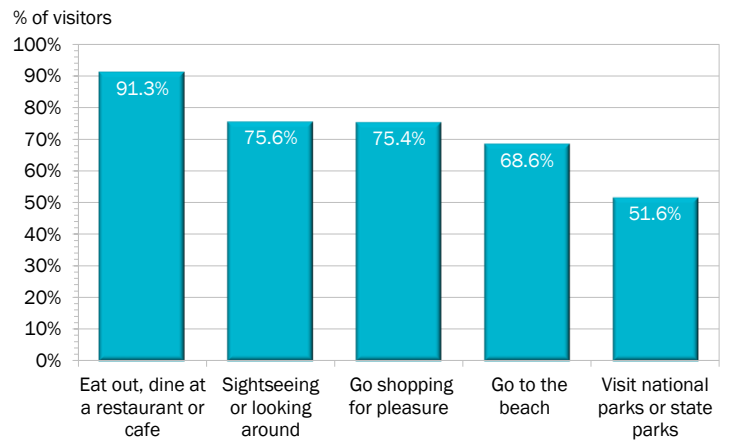
Preliminary results

Due to quality issues with the incoming passenger data, IVS results for the YE Mar 18 are preliminary and do not include any data relating to purpose of visit. There are no issues with the survey collection.

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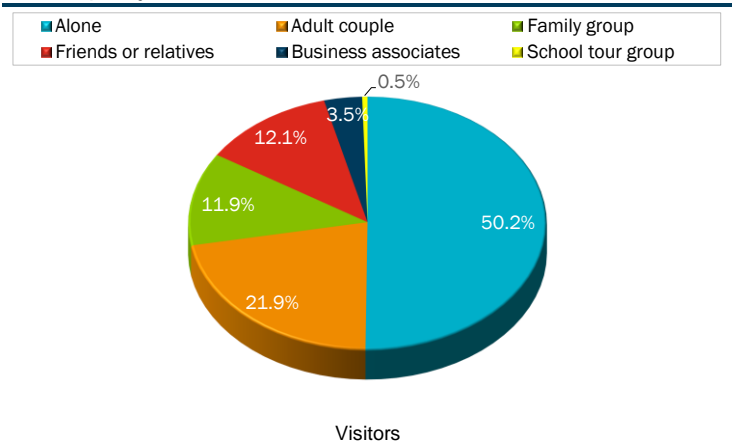
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Top activities in Australia



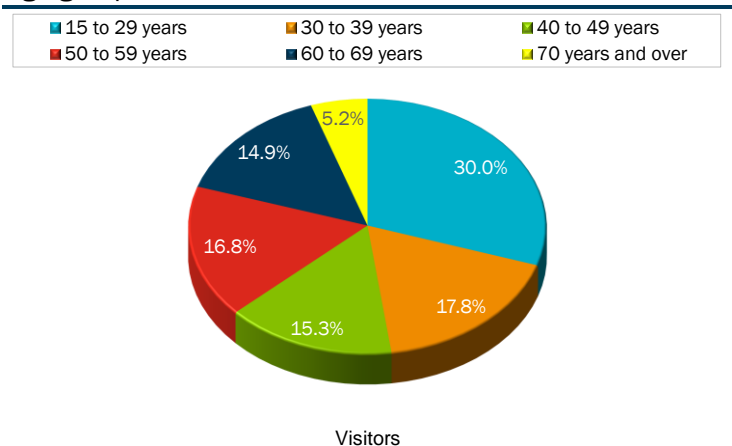
'Eat out, dine at a restaurant or cafe' (91.3%) was the most popular activity undertaken during the trip to Australia by international overnight visitors who had been to NSW. 'Sightseeing or looking around' (75.6%) was the 2nd most popular, followed by 'go shopping for pleasure' (75.4%) and 'go to the beach' (68.6%).

Travel party



Over ½ (50.2%) of international overnight visitors who had been to NSW arrived in Australia 'alone'. Their 2nd most common travel party description was 'adult couple' (21.9%), followed by 'friends or relatives' (12.1%).

Age groups



'15 to 29 years' (30.0%) was the biggest age group amongst international overnight visitors to NSW, followed by '30 to 39 years' (17.8%) and '50 to 59 years' (16.8%).

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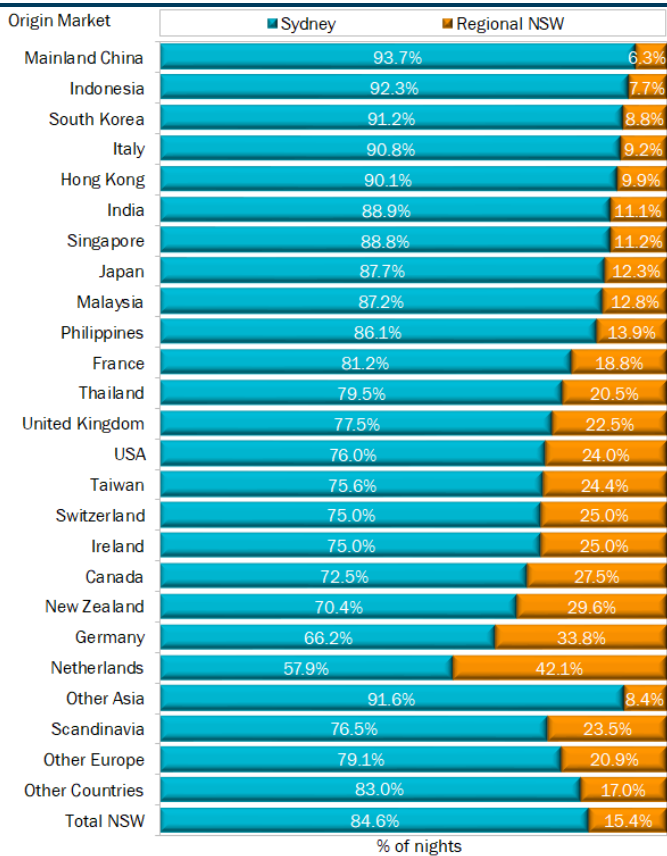
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Preliminary	YE Mar 18	YE Mar 17	YE on YE growth
Visitors to NSW (million)	4.3	4.0	8.5%
Nights in NSW (million)	94.5	89.9	5.1%
Expenditure in NSW (billion)	\$10.5	\$9.8	7.0%
Expenditure per night in NSW	\$111	\$109	1.8%

Destinations in NSW

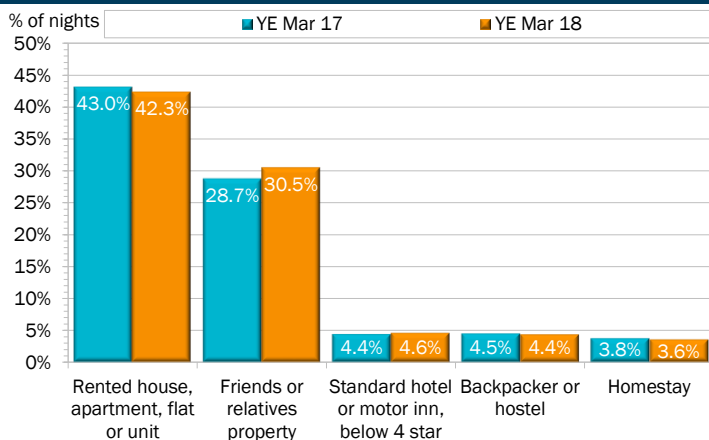


International overnight visitors spent 84.6% of their nights in Sydney – up by 0.4% pts on YE Mar 17.

Visitors from Mainland China (93.7%) had the highest proportion of nights spent in Sydney, followed by Indonesian visitors (92.3%) and South Koreans (91.2%).

Visitors from Netherlands (42.1%) had the highest proportion of nights in regional NSW, followed by German visitors (33.8%) and visitors from New Zealand (29.6%).

Accommodation in NSW



'Rented house, apartment, flat or unit' (42.3%) was the most popular accommodation type used for nights in NSW by international visitors, followed by 'friends or relatives property' (30.5%) and 'standard hotel or motor inn, below 4 star' (4.6%).

Compared to YE Mar 17, 'friends or relatives property' increased by 1.8% pts while 'rented house, apartment, flat or unit' decreased by 0.7% pts.

Overview - Australia

Australia received over 8.3 million international visitors who spent nearly 269.2 million nights in Australia – up by 7.5%* and by 2.8%* respectively on YE Mar 17. On average, they stayed for 32.4 nights - down by 1.5 nights on YE Mar 17.

Visitors spent nearly \$29.1 billion (incl package expenditure) while in Australia - up by 6.7%* on YE Mar 17. On average, they spent \$3,498 per visitor and \$108 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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