

Road trippers to NSW

Year ended December 2017

For the period of January 2017 to December 2017

Sources: (1) International Visitor Survey (IVS) & (2) National Visitor Survey (NVS), YE Dec 17, Tourism Research Australia (TRA) - unless otherwise specified.



Definition

Road trippers are defined as fully independent overnight holiday visitors who had at least 2 stopovers on their trip. They travelled by private vehicle, company car, rental car, self-drive motorhome or campervan.

Overview

	Visitors (million)	Nights (million)	Total spend (\$ billion)	Spend per visitor (\$)	Spend per night (\$)
Australia	5.5	53.5	\$13.2	\$2,396	\$247
NSW	2.1	15.1	\$3.9	\$1,840	\$255

NSW received nearly 2.1 million international⁽¹⁾ and domestic⁽²⁾ road trippers. They spent over 15.1 million nights in the State up by 5.9% on YE Dec 16.

Road trippers spent an estimated \$3.9 billion⁽³⁾ in NSW - up by 16.5% on YE Dec 16.

⁽¹⁾ Source: International Visitor Survey, YE Dec 17, Tourism Research Australia.

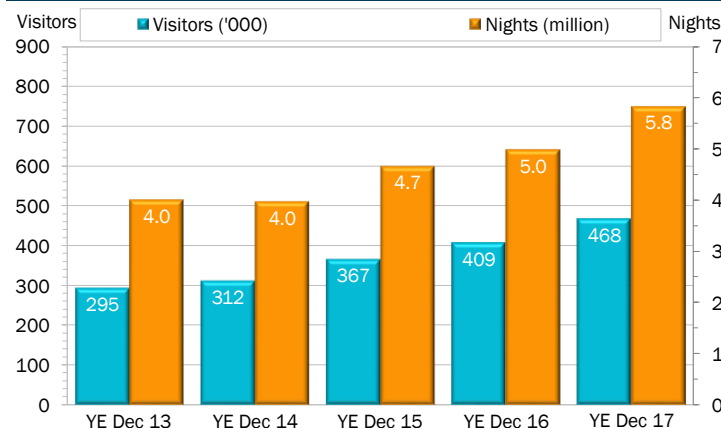
⁽²⁾ Source: National Visitor Survey, YE Dec 17, Tourism Research Australia.

⁽³⁾ Total expenditure on the trip.

International Market¹

The information in this section relates to international road trippers who had been to NSW.

Visitors and nights in NSW



NSW received 467,700 international road trippers - up by 14.5%* on YE Dec 16. They spent over 5.8 million nights in the State - up by 16.9%* on YE Dec 16.

Market share

International road trippers contributed 11.0% of visitors and 6.2% of nights in NSW. Compared to YE Dec 16, the share of visitors was up by 0.6% pts and the share of nights was up by 0.5% pts.

NSW received 38.5% visitors and 27.9% of nights by international road trippers to Australia. Compared to YE Dec 16, the share of visitors was up by 2.9% pts and the share of nights was up by 3.8% pts.

Seasonality

Over 3/10 (30.6%) of international road trippers who had been to the State departed Australia in the March quarter. December quarter (29.2%) was the 2nd most popular.

Nearly 3/10 (28.6%) of **nights** in NSW by international road trippers were spent by those who departed Australia in the March quarter. June quarter (26.1%) was the 2nd most popular.

Origin

Rank	Origin market	Visitors		Nights		Average stay (nights)
		('000)	%	('000)	%	
1	United Kingdom	71	15.1%	922	15.8%	13.1
2	Mainland China	50	10.7%	282	4.8%	5.7
3	USA	49	10.5%	384	6.6%	7.8
4	New Zealand	34	7.3%	np	np	np
5	Germany	32	6.9%	588	10.1%	18.1
	Other Asia (1)	101	21.7%	1,602	27.4%	15.8
	Other Europe (2)	86	18.4%	1,244	21.3%	14.4
	Other Countries	44	9.4%	654	11.2%	15.0
	Total	468		5,839		12.5

np = estimate considered statistically unreliable

The United Kingdom (15.1%) was the largest source market of international road trippers to NSW. Mainland China (10.7%) was the 2nd largest, followed by the USA (10.5%).

The United Kingdom (15.8%) contributed more **nights** in the State than any other source market of international road trippers. Germany (10.1%) was the 2nd largest, followed by Taiwan (8.2%).

⁽¹⁾ All Asian markets, excluding Mainland China.

⁽²⁾ All European markets, excluding the United Kingdom and Germany.

Average length of stay in NSW

International road trippers stayed an average of 12.5 nights in NSW. This was shorter than the average for all international visitors to the State (22.2 nights).

Taiwanese road trippers (48.1 nights) had the longest average stay in NSW, followed by road trippers from South Korea (35.5 nights) and French road trippers (22.8 nights).

Median stay in NSW

International road trippers had a median stay of 9 nights in the State. This was substantially longer than the median stay for all international visitors in NSW (5 nights).

Road trippers from South Korea (25 nights) had the longest median stay in the State, followed by Taiwanese road trippers (20 nights) and road trippers from Ireland (17 nights).

Total length of trip in Australia

'4 to 7 nights' (27.8%) was the most common length of trip amongst international road trippers who had been to the State. '22 nights or more' (25.1%) was the 2nd most common, followed by '8 to 14 nights' (22.6%).

Expenditure

Expenditure	Destination			
	New South Wales		Australia	
	YE Dec 16	YE Dec 17	YE Dec 16	YE Dec 17
Total (\$ billion)	\$1.4	\$1.7	\$5.5	\$6.0
Per visitors (\$)	\$3,522	\$3,741	\$4,841	\$4,912
Per night (\$)	\$288	\$300	\$267	\$285

International road trippers spent an estimated \$1.7 billion in NSW - up by 21.6%* on YE Dec 16. On average, they spent \$3,741 per visitor and \$300 per night. In total, road trippers spent \$6.0 billion in Australia - up by 7.6%* on YE Dec 16.

Road trippers contributed 16.8% of expenditure by all international visitors to NSW - up by 1.7% pts on YE Dec 16.

NSW received 29.4% of expenditure by international road trippers in Australia - up by 3.4% pts on YE Dec 16.

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

* The percentage change is statistically significant.

np = Not published due to insufficient sample.

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Sources: (1) IVS & (2) NVS, YE Dec 17, TRA - unless otherwise specified.



International Market continued

Top regions visited in NSW

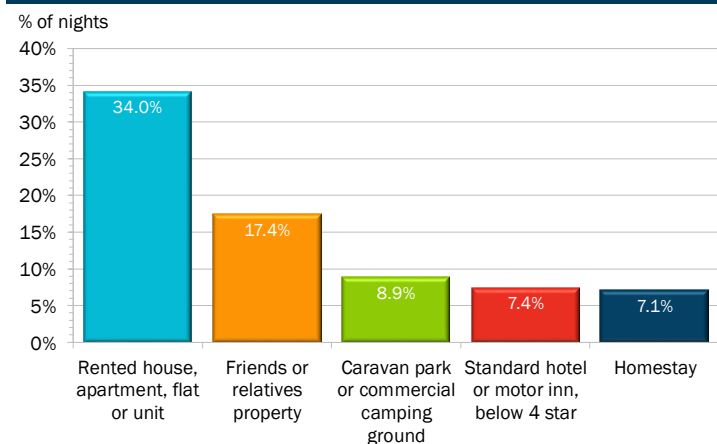
Visitors			Nights		
Region	('000)	%	Region	('000)	%
Sydney	270	57.7%	Sydney	3,491	59.8%
North Coast NSW	157	33.6%	North Coast NSW	896	15.3%
South Coast NSW	82	17.5%	South Coast NSW	270	4.6%
The Hunter	74	15.9%	np	np	np
Blue Mountains	65	13.8%	np	np	np

np = estimate considered statistically unreliable

'Sydney' (57.7%) was by far the most visited region in NSW by international road trippers. 'North Coast NSW' (33.6%) was the 2nd most visited, followed by 'South Coast NSW' (17.5%).

International road trippers spent more **nights** in 'Sydney' (59.8%) than any other region in the State. 'North Coast NSW' (15.3%) had the 2nd most nights, followed by 'South Coast NSW' (4.6%).

Accommodation used in NSW

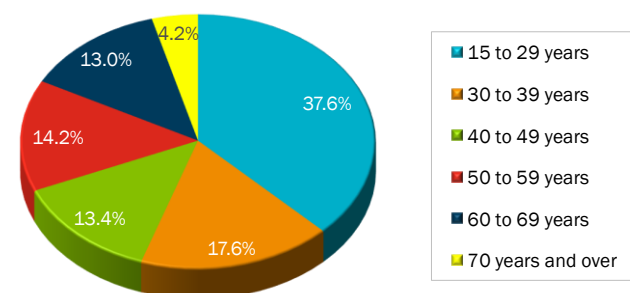


'Rented house, apartment, flat or unit' (34.0%) was the most popular accommodation type used for nights in the State by international road trippers. 'Friends or relatives property' (17.4%) was the 2nd most popular, followed by 'caravan park or commercial camping ground' (8.9%).

Gender

A larger proportion of international road trippers to NSW were female (52.2%) than male (47.8%).

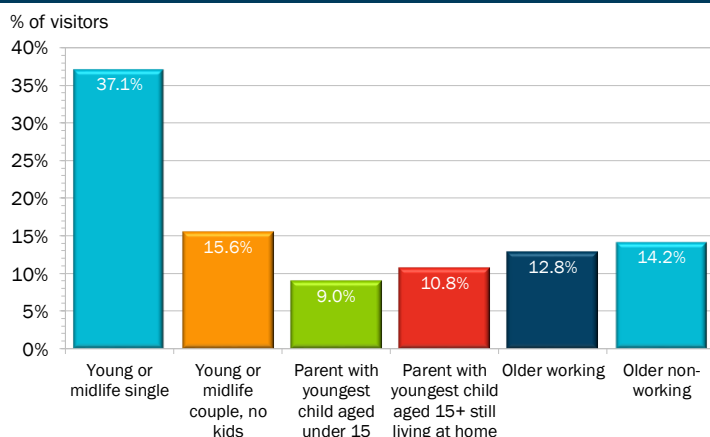
Age groups



Visitors

'15 to 29 years' (37.6%) was the biggest age group of international road trippers to the State. '30 to 39 years' (17.6%) was the 2nd biggest, followed by '50 to 59 years' (14.2%).

Lifecycle group

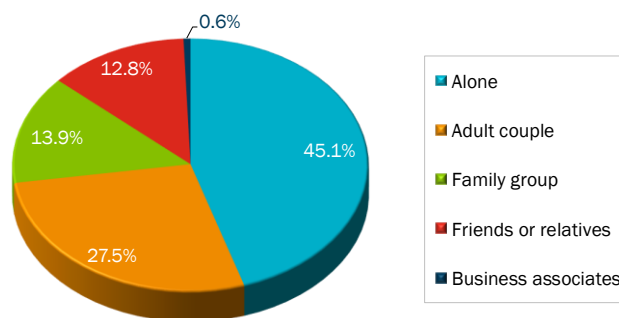


'Young or midlife single' (37.1%) was the most common lifecycle grouping amongst international road trippers who had been to NSW, followed by 'young or midlife couple, no kids' (15.6%).

First or return visitor to Australia

Nearly ½ (49.1%) of international road trippers who had been to NSW were on a return visit to Australia. This was a lower percentage than for all visitors to the State (50.9%).

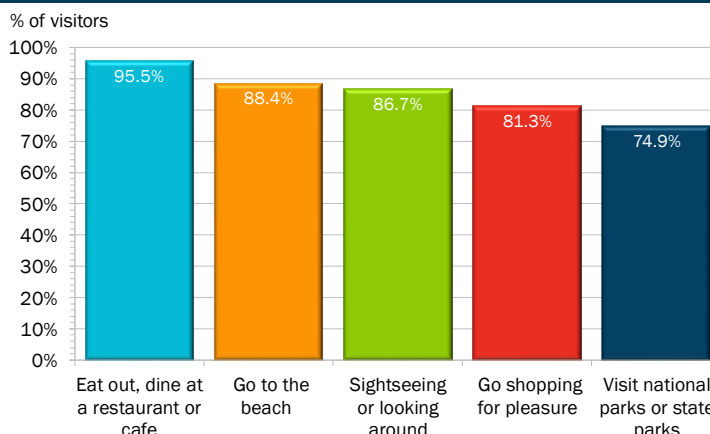
Travel party to Australia



Visitors

Nearly ½ (45.1%) of international road trippers who had been to NSW arrived in Australia 'alone'. Their 2nd most common travel party description was 'adult couple' (27.5%).

Top activities in Australia



'Eat out, dine at a restaurant or cafe' (95.5%) was the most popular activity undertaken during the trip to Australia by international road trippers who had been to the State. 'Go to the beach' (88.4%) was the 2nd most popular.

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Road trippers to NSW

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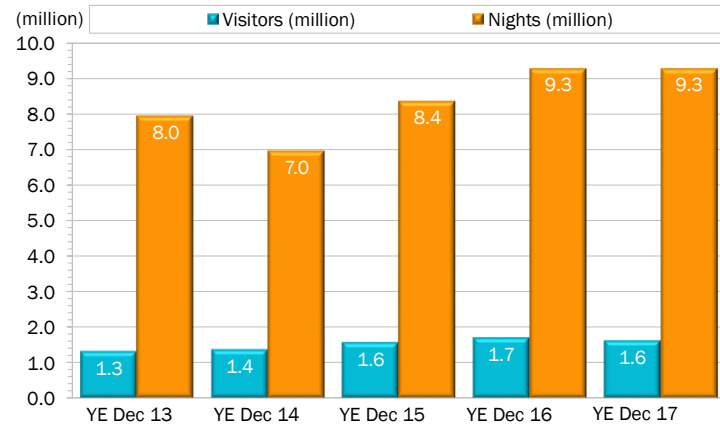
Sources: (1) IVS & (2) NVS, YE Dec 17, TRA - unless otherwise specified.



Domestic Market²

The information in this section relates to domestic road trippers who had been to NSW.

Visitors and nights in NSW



NSW received over 1.6 million domestic road trippers. They spent nearly 9.3 million nights in the State.

Market share

Domestic road trippers contributed 5.2% of visitors and 9.3% of nights in NSW.

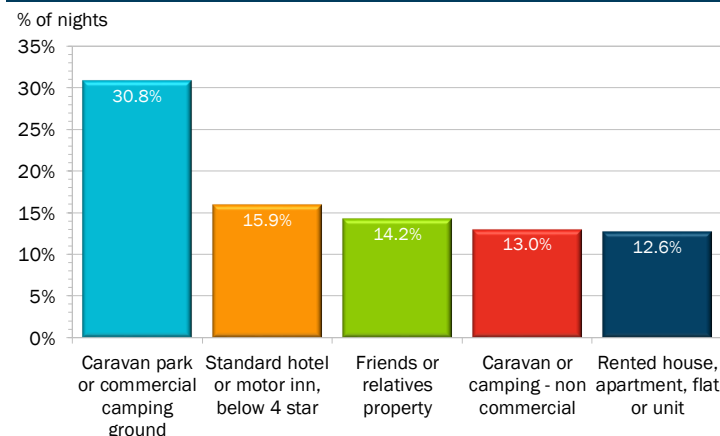
NSW received 37.9% visitors and 28.5% of nights by domestic road trippers to Australia.

Seasonality

More domestic road trippers returned home from their trip to NSW in January (14.5%) than any other month. April (12.7%) was the 2nd most popular, followed by October (11.0%) and July (10.0%).

Over 1/8 (14.5%) of **nights** in the State by domestic road trippers were spent by those who returned home from the trip in January. September (12.0%) had the 2nd highest proportion, followed by October (11.9%) and April (10.3%).

Accommodation used in NSW



'Caravan park or commercial camping ground' (30.8%) was the most popular accommodation type used for nights in the State by domestic road trippers, 'Standard hotel or motor inn, below 4 star' (15.9%) was the 2nd most popular, followed by 'friends or relatives property' (14.2%) and 'caravan or camping - non commercial' (13.0%).

Origin

Origin market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	488	30.0%	3,075	33.1%	6.3
Sydney	391	24.0%	2,038	21.9%	5.2
Intrastate	880	54.0%	5,113	55.0%	5.8
Victoria	352	21.7%	2,039	21.9%	5.8
Queensland	212	13.0%	1,111	12.0%	5.2
ACT	61	3.8%	np	np	np
Other interstate	122	7.5%	789	8.5%	6.5
Interstate	748	46.0%	4,179	45.0%	5.6
Total NSW	1,628		9,292		5.7

np = estimate considered statistically unreliable

Regional NSW (30.0%) was the largest source market of domestic road trippers to NSW. Sydney (24.0%) was the 2nd largest, followed by Victoria (21.7%).

Nearly 1/2 (46.0%) of road trippers to NSW came from interstate.

Regional NSW (33.1%) contributed more **nights** in the State than any other source market of domestic road trippers. Victoria (21.9%) was the 2nd largest, followed by Sydney (21.9%).

Over 2/5 (45.0%) of nights in NSW by road trippers came from interstate.

Average length of stay in NSW

Domestic road trippers stayed an average of 5.7 nights in the State. This was longer than the average for all domestic visitors in NSW (3.2 nights).

South Australian road trippers (8.2 nights) had the longest average stay in the State, followed by road trippers from regional NSW (6.3 nights) and Victorian road trippers (5.8 nights).

Median stay in NSW

Domestic road trippers had a median stay of 5 nights in the State. This was longer than the median stay for all domestic visitors in NSW (2 nights).

Road trippers from South Australia (7 nights) had the longest median stay in the State.

Total length of trip in Australia

'4 to 7 nights' (35.4%) was the most common length of trip amongst domestic road trippers who had been to the State. '8 to 14 nights' (31.6%) was the 2nd most common, followed by '2 to 3 nights' (17.0%).

Expenditure

Expenditure	Destination			
	New South Wales		Australia	
	YE Dec 16	YE Dec 17	YE Dec 16	YE Dec 17
Total (\$ billion)	\$1.9	\$2.1	\$6.7	\$7.2
Per visitors (\$)	\$1,096	\$1,293	\$1,619	\$1,685
Per night (\$)	\$201	\$227	\$212	\$222

Domestic road trippers spent an estimated \$2.1 billion in NSW – up by 12.6%* on YE Dec 16. On average, they spent \$1,293 per visitor and \$227 per night. In total, road trippers spent \$7.2 billion in Australia – up by 7.4%* on YE Dec 16.

Road trippers contributed 11.3% of expenditure by all domestic visitors to NSW – up by 0.1% pt on YE Dec 16.

NSW received 29.1% of expenditure by domestic road trippers in Australia – up by 1.3% pts on YE Dec 16.

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Domestic Market continued

Top regions visited in NSW

Visitors			Nights		
Region	('000)	%	Region	('000)	%
North Coast NSW	558	34.3%	North Coast NSW	3,025	32.6%
South Coast NSW	291	17.9%	South Coast NSW	1,313	14.1%
Sydney	267	16.4%	Sydney	933	10.0%
Central NSW	251	15.4%	Central NSW	838	9.0%
New England North West	221	13.6%	New England North West	571	6.1%

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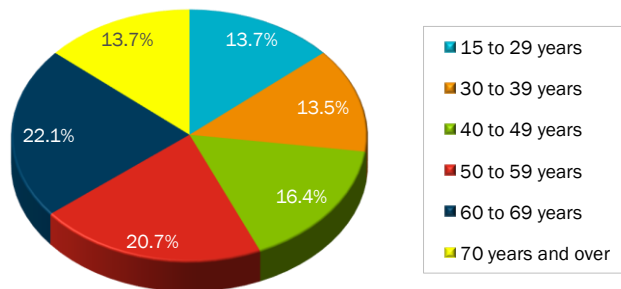
'North Coast NSW' (34.3%) was by far the most visited region in NSW by domestic road trippers. 'South Coast NSW' (17.9%) was the 2nd most visited, followed by 'Sydney' (16.4%) and 'Central NSW' (15.4%).

Domestic road trippers spent more **nights** in 'North Coast NSW' (32.6%) than any other region in the State. 'South Coast NSW' (14.1%) had the 2nd most nights, followed by 'Sydney' (10.0%) and Central NSW (9.0%).

Gender

A larger proportion of domestic road trippers who had been to the State were male (50.6%) than female (49.4%).

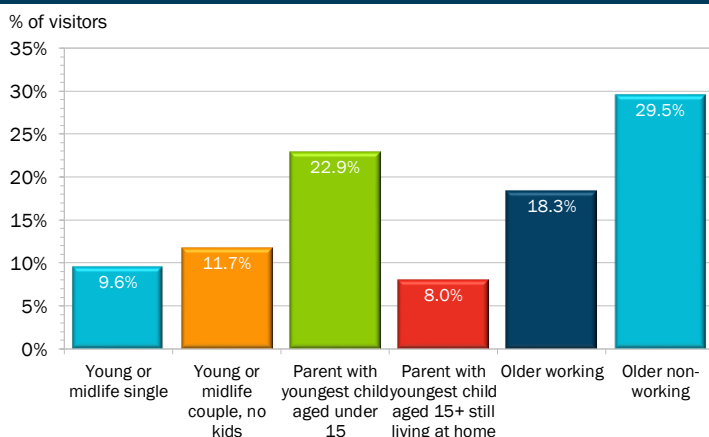
Age groups



Visitors

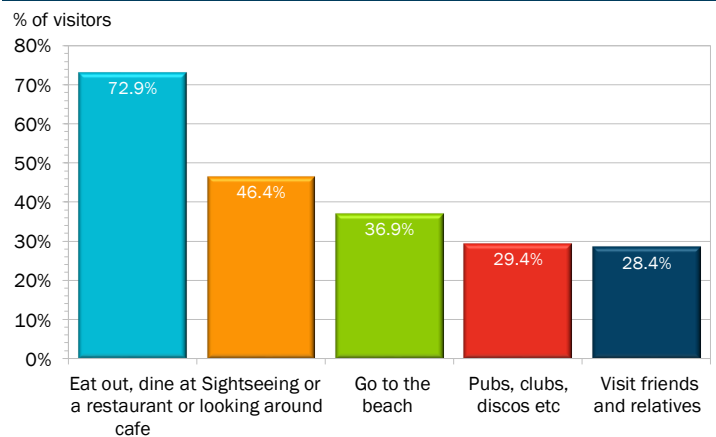
'60 to 69 years' (22.1%) was the biggest age group of domestic road trippers who had been to NSW. '50 to 59 years' (20.7%) was the 2nd biggest, followed by '40 to 49 years' (16.4%).

Lifecycle groups



'Older non-working' (29.5%) was the most common lifecycle grouping amongst domestic road trippers who had been to NSW. 'Parent with youngest child aged under 15' (22.9%) was the 2nd most common, followed by 'older working' (18.3%).

Activities in NSW



'Eat out, dine at a restaurant or cafe' (72.9%) was the most popular activity undertaken by domestic road trippers in NSW. 'Sightseeing or looking around' (46.4%) was the 2nd most popular activity, followed by 'go to the beach' (36.9%).

Marital status

A larger proportion of domestic road trippers who had been to the State were married or lived as a couple (79.3%) than single (20.7%).

Employment status

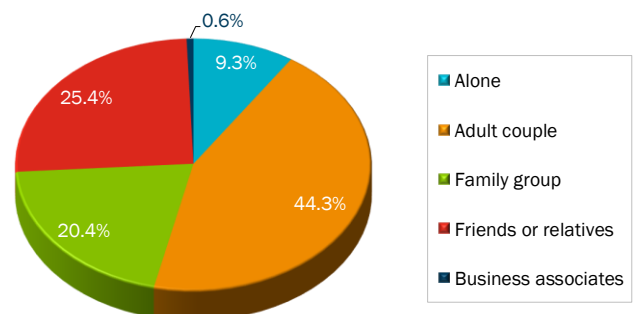
Over 2/5 (42.4%) of domestic road trippers who had been to NSW were 'working full time'. 'Retired or on a pension' (29.0%) was the 2nd most common employment status, followed by 'working part time' (19.0%).

Household income

Domestic road trippers who had been to NSW had an average annual household income of \$117,952.

'\$150,000+ pa' (24.9%) was the most common income range, followed by '\$85,000 - \$114,999 pa' (14.7%).

Travel party



Visitors

'Adult couple' (44.3%) was the most common travel party amongst domestic road trippers who had been to NSW. 'Friends and relatives' (25.4%) was the 2nd most common, followed by 'family group' (20.4%).

Further information

Please see www.destinationnsw.com.au for profiles on travel to each region in NSW and information on international and domestic travel to the State.