Travel to Capital Country
Year ended March 2018
For the period of April 2017 to March 2018

Sources: (1) National Visitor Survey (NVS) & (2) International Visitor Survey (VIS), YE Mar 18, Tourism Research Australia (TRA) - unless otherwise specified.

Domestic Overnight Travel

Visitors and nights

<table>
<thead>
<tr>
<th>Year</th>
<th>Visitors (000)</th>
<th>Nights (000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>YE Mar 14</td>
<td>1,057</td>
<td>2,304</td>
</tr>
<tr>
<td>YE Mar 15</td>
<td>1,043</td>
<td>2,520</td>
</tr>
<tr>
<td>YE Mar 16</td>
<td>1,191</td>
<td>2,898</td>
</tr>
<tr>
<td>YE Mar 17</td>
<td>1,418</td>
<td>3,170</td>
</tr>
<tr>
<td>YE Mar 18</td>
<td>1,418</td>
<td>3,170</td>
</tr>
</tbody>
</table>

Capital Country received over 1.4 million domestic overnight visitors - up by 18.0%* on YE Mar 17. Visitors spent nearly 3.2 million nights in the region - up by 12.5% on YE Mar 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 11.2 percent* on last year and by 41.6 percent* compared to four years ago.

Market share

The region received 6.2% of visitors and 4.3% of nights in regional NSW. Compared to YE Mar 17, the share of visitors was up by 0.4 pts and the share of nights was up by 0.3 pts.

Purpose of visit to Capital Country

‘Visiting friends and relatives (VFR)’ (43.1%) was the largest purpose of visit for visitors to the region, followed by ‘holiday’ (33.2%) and ‘business’ (16.3%). Compared to YE Mar 17, visitors who travelled for ‘VFR’ grew by 28.3%* and ‘holiday’ increased by 2.1% while ‘business’ grew by 41.2%*.

‘VFR’ (47.9%) was the largest purpose in terms of nights in the region, followed by ‘holiday’ (31.9%) and ‘business’ (14.1%). Compared to YE Mar 17, nights spent for ‘VFR’ grew by 42.6%* while ‘holiday’ declined by 8.2% and ‘business’ increased by 6.9%.

Accommodation used in Capital Country

‘Friends or relatives property’ (52.8%) was the most popular accommodation used for nights in the region. ‘Standard hotel or motor inn, below 4 star’ (15.6%) was the 2nd most popular accommodation, followed by ‘caravan or camping – non commercial’ (6.8%).

Sydney (37.5%) was the largest source market in terms of nights in the region, followed by regional NSW (32.2%) and Queensland (8.0%). Compared to YE Mar 17, nights spent by visitors from Sydney grew by 3.8% and nights from regional NSW increased by 11.5%. Over the same period, Queensland nights grew by 21.1% while nights by Victorians declined by 23.7% and nights by visitors from the ACT decreased by 9.7%.

Top activities in Capital Country

‘Eat out, dine at a restaurant or café’ (53.1%) was the most popular activity undertaken by visitors to the region, followed by ‘visit friends and relatives’ (46.3%) and ‘sightseeing or looking around’ (19.5%).

Age groups

‘60 to 69 years’ (20.6%) was the largest age group of visitors to the region, followed by ‘50 to 59 years’ (18.4%) and ‘15 to 29 years’ (18.3%).

Travel party

‘Adult couple’ (32.8%) was the most common travel party amongst visitors to the region, followed by ‘alone’ (27.8%) and ‘family group’ (17.8%).

Expenditure (incl airfares and transport costs)

Domestic overnight visitors spent $442 million in the region - up by 17.6% on YE Mar 17. On average, they spent $139 per night - up by 4.5% on YE Mar 17.

(3) Source: TRA’s expenditure allocation method applied to NVS data, YE Mar 18.

Capital Country includes Bowral, Goulburn, Yass, Young.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.
Capital Country received 33,700 international overnight visitors – up by 6.0% on YE Mar 17. Visitors spent 461,800 nights in the region - down by 10.0% on YE Mar 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 11.2 percent* on last year and by 41.6 percent* compared to four years ago.

Market share
The region received 3.9% of visitors and 3.2% of nights in regional NSW. Compared to YE Mar 17, the share of visitors was down by 0.2% pts and the share of nights was down by 0.4% pts.

Origin – share of visitors to Capital Country

New Zealand (22.3%) was the region’s largest individual source market of visitors, followed by the United Kingdom (14.5%) and the USA (10.5%).

Accommodation used in Capital Country

‘Rented house, apartment, flat or unit’ (32.9%) was the most popular form of accommodation used for nights in the region, followed by ‘friends or relatives property’ (24.1%).

Age groups

‘15 to 29 years’ (28.0%) was the largest age group of visitors to the region, followed by ‘40 to 49 years’ (23.3%) and ‘60 to 69 years’ (15.1%).

Expenditure (incl 30% prepaid package expenditure)*

Expenditure by international overnight visitors in the region is statistically unreliable.

Preliminary IVS 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.

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

* The percentage change is statistically significant.

np = Not published due to insufficient sample.