

Overview

TOTAL TRAVEL ⁽¹⁾ - preliminary					
Estimate	% change		Market share		
95.6 million visitors	6.9%	↑	31.7%	0.5% pt	
Aus	5.3%	↑			
195.9 million nights	5.1%	↑	31.6%	0.4% pts	
Aus	3.8%	↑			
\$36.0 billion	11.5%	↑	31.3%	1.6% pts	
Aus	5.9%	↑			

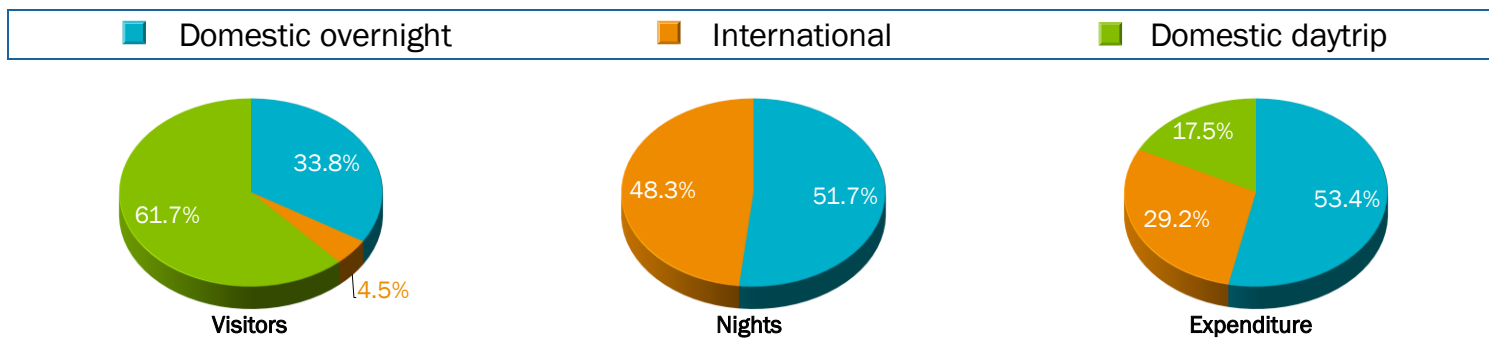
Domestic overnight travel ⁽²⁾					
Estimate	% change		Market share		
32.3 million visitors	9.8% *	↑	33.0%	0.9% pts	
Aus	6.7% *	↑			
101.4 million nights	5.1% *	↑	28.9%	0.1% pt	
Aus	4.5% *	↑			
\$19.2 billion	14.9% *	↑	29.5%	2.4% pts	
Aus	5.5% *	↑			

International overnight travel ⁽³⁾ - preliminary					
Estimate	% change		Market share		
4.3 million visitors	8.5% *	↑	52.2%	0.4% pts	
Aus	7.5% *	↑			
94.5 million nights	5.1% *	↑	35.1%	0.8% pts	
Aus	2.8% *	↑			
\$10.5 billion	7.0% *	↑	36.1%	0.1% pts	
Aus	6.7% *	↑			

Domestic daytrip travel ⁽²⁾					
Estimate	% change		Market share		
59.0 million visitors	5.4% *	↑	30.2%	0.3% pts	
Aus	4.5% *	↑			
\$6.3 billion	9.5% *	↑	30.3%	0.9% pts	
Aus	6.0% *	↑			

Due to quality issues with the incoming passenger data, IVS and total travel results for the year ended March 2018 are preliminary and do not include any data relating to purpose of visit. There are no issues with the survey collection.

NSW by sector



* The percentage change is statistically significant.

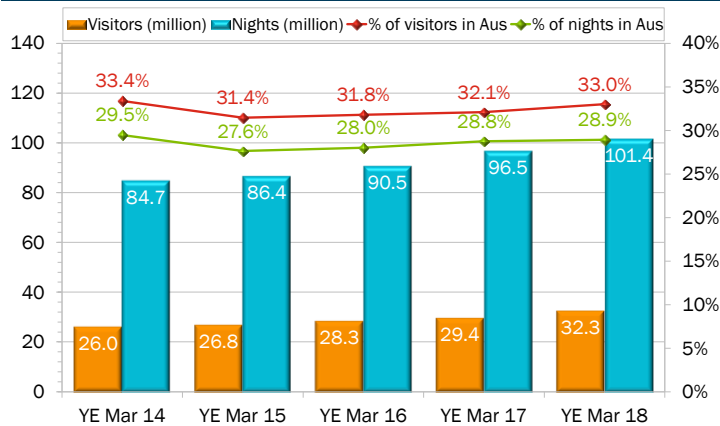
(1) Estimated using data from National Visitor Survey (NVS), International Visitor Survey (IVS) & Tourism Research Australia's (TRA) expenditure allocation method applied to NVS and IVS data, YE Mar 18.

(2) Source: NVS & TRA's expenditure allocation method applied to NVS data, YE Mar 18.

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

Domestic Overnight Travel⁴

Visitors and nights

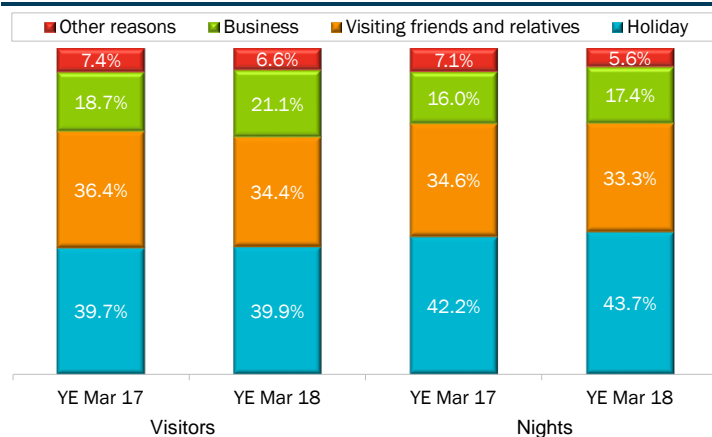


NSW received nearly 32.3 million domestic overnight visitors - up by 9.8%* on YE Mar 17. Visitors spent nearly 101.4 million nights in the State - up by 5.1%* on YE Mar 17.

Market share

NSW received 33.0% of visitors and 28.9% of nights in Australia. Compared to YE Mar 17, the share of visitors was up by 0.9% pts and the share of nights was up by 0.1% pt.

Purpose of visit to NSW



'Holiday' (39.9%) was the largest purpose of visit for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (34.4%) and 'business' (21.1%). Compared to YE Mar 17, visitors who travelled for 'holiday' grew by 10.3%* and 'VFR' increased by 3.4% while 'business' grew by 23.7%*.

'Holiday' (43.7%) was the largest purpose in terms of nights in the State, followed by 'VFR' (33.3%) and 'business' (17.4%). Compared to YE Mar 17, nights spent for 'holiday' grew by 8.8%* and 'VFR' increased by 1.0% while 'business' grew by 14.1%*.

Accommodation in NSW

'Friends or relatives property' (38.3%) was the most popular accommodation type used for nights in NSW, followed by 'standard hotel or motor inn, below 4 star' (13.9%) and 'caravan park or commercial camping ground' (10.2%).

Compared to YE Mar 17, 'luxury hotel or resort, 4 or 5 star' grew by 0.9% pts, while 'caravan park or commercial camping ground' decreased by 0.5% pts.

Origin

Origin	Visitors ('000)	%	Visitor nights ('000)	Spend in NSW (\$ million)	Average spend per night in NSW	Average length of stay in NSW
Regional NSW	12,248	37.9%	34,856	5,939	170	2.8
Sydney	9,145	28.3%	25,561	5,526	216	2.8
Total intrastate	21,393	66.3%	60,418	11,465	190	2.8
Queensland	3,899	12.1%	14,489	2,666	184	3.7
Victoria	3,839	11.9%	14,070	2,812	200	3.7
ACT	1,759	5.4%	5,341	803	150	3.0
Other interstate	1,393	4.3%	7,046	1,467	208	5.1
Total interstate	10,890	33.7%	40,945	7,748	189	3.8
Total NSW	32,283		101,363	19,213	190	3.1

Regional NSW (12.2 million or 37.9%) was the largest source of visitors to the State, followed by Sydney (9.1 million or 28.3%) and Queensland (3.9 million or 12.1%). Compared to YE Mar 17, the regional NSW source market grew by 8.1%* and Sydney increased by 9.0%* while Queensland grew by 3.8%.

Regional NSW (34.9 million or 34.4%) was the largest source market in terms of nights in the State, followed by Sydney (25.6 million or 25.2%) and Queensland (14.5 million or 14.3%). Compared to YE Mar 17, nights spent by visitors from regional NSW grew by 6.9%* and nights from Sydney increased by 5.9% while nights by Queenslanders declined by 8.2%.

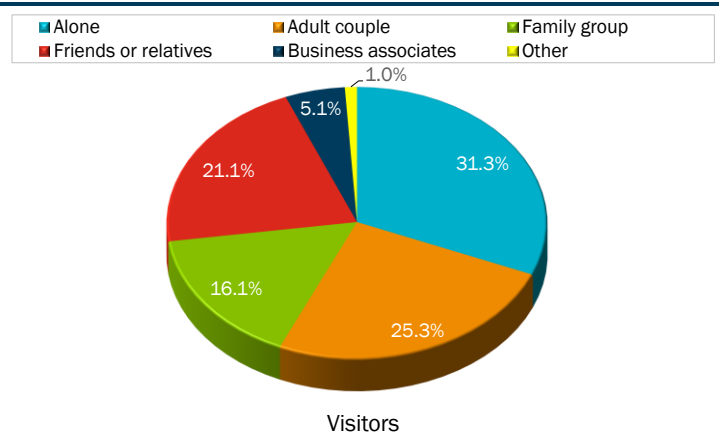
Transport in NSW

'Private vehicle or company car' (75.6%) was the most popular form of transport used by visitors to NSW, followed by 'aircraft' (18.2%) and 'railway' (4.3%).

Top activities in NSW

'Eat out, dine at a restaurant or cafe' (64.7%) was the most popular activity undertaken by visitors to the State. 'Visit friends and relatives' (44.1%) was the 2nd most popular, followed by 'sightseeing or looking around' (23.8%).

Travel party



'Alone' (31.3%) was the most common travel party amongst visitors to NSW. 'Adult couple' (25.3%) was the 2nd most common, followed by 'friends or relatives' (21.1%).

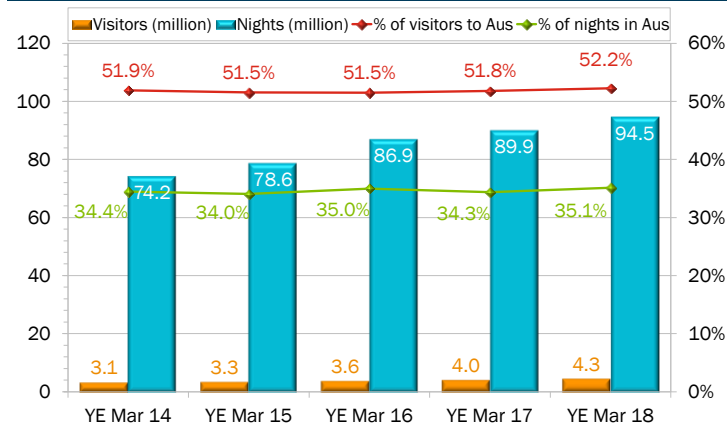
Expenditure (incl airfares and transport costs)⁶

Domestic overnight visitors spent \$19.2 billion in NSW - up by 14.9%* on YE Mar 17. On average, visitors spent \$190 per night in NSW - up by 9.3% on YE Mar 17.

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

International Overnight Travel⁵ - preliminary

Visitors and nights



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.

Market share

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.

Origin to NSW

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
	Other markets	1,284	29.6%	37,351	3,159	85	29.1
	Total NSW	4,338		94,520	10,497	111	21.8

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%). 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.

Expenditure (incl 30% prepaid package expenditure)⁷

International overnight visitors spent \$10.5 billion in NSW - up by 7.0%* on YE Mar 17. On average, visitors spent \$111 per night in NSW - up by 1.8% on YE Mar 17.

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

Preliminary IVS results

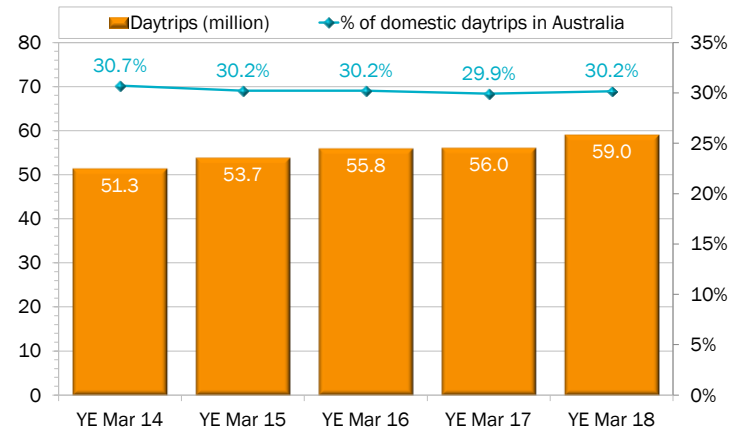
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Please note: Due to quality issues with the incoming passenger data, IVS and total travel results for the YE Mar 18 are preliminary.

* The percentage change is statistically significant.

Domestic Daytrip Travel⁴

Daytrips



NSW received nearly 59.0 million domestic daytrip visitors - up by 5.4%* on YE Mar 17.

Market share

NSW received 30.2% of daytrips in Australia. Compared to YE Mar 17, the share was up by 0.3% pts.

Main purpose of trip

'Holiday' (49.3%) was the largest purpose of trip for visitors to the State, followed by 'visiting friends and relatives (VFR)' (28.5%) and 'business' (9.3%). Compared to YE Mar 17, visitors who travelled for 'holiday' grew by 9.8%* and 'VFR' increased by 3.9% while 'business' declined by 7.5%.

Age groups

'15 to 29 years' (21.7%) was the largest age group of visitors to the State, followed by '50 to 59 years' (17.0%) and '60 to 69 years' (16.7%).

Top activities in NSW

'Eat out, dine at a restaurant or cafe' (50.6%) was the most popular activity undertaken by visitors to NSW, followed by 'visit friends and relatives' (33.4%).

Expenditure⁶

Domestic daytrip visitors spent \$6.3 billion in NSW - up by 9.5%* on YE Mar 17. On average, they spent \$107 per trip to the State - up by 3.9% on YE Mar 17.

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

Forecast⁸

Domestic visitor nights in NSW are expected to increase from nearly 97.9 million in 2016/17 to nearly 118.9 million in 2026/27, an average annual growth rate of 2.0%.

International visitor nights in NSW 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%.

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

Further information

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