Overview

**TOTAL TRAVEL**¹ - preliminary

<table>
<thead>
<tr>
<th>Estimate</th>
<th>% change</th>
<th>Market share</th>
</tr>
</thead>
<tbody>
<tr>
<td>95.6 million visitors</td>
<td>6.9%</td>
<td>31.7% 0.5% pt</td>
</tr>
<tr>
<td>195.9 million nights</td>
<td>5.1%</td>
<td>31.6% 0.4% pts</td>
</tr>
<tr>
<td>$36.0 billion</td>
<td>11.5%</td>
<td>31.3% 1.6% pts</td>
</tr>
</tbody>
</table>

**Domestic overnight travel**²

<table>
<thead>
<tr>
<th>Estimate</th>
<th>% change</th>
<th>Market share</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.3 million visitors</td>
<td>9.8%</td>
<td>33.0% 0.9% pts</td>
</tr>
<tr>
<td>101.4 million nights</td>
<td>5.1%</td>
<td>28.9% 0.1% pt</td>
</tr>
<tr>
<td>$19.2 billion</td>
<td>14.9%</td>
<td>29.5% 2.4% pts</td>
</tr>
</tbody>
</table>

**International overnight travel**³ - preliminary

<table>
<thead>
<tr>
<th>Estimate</th>
<th>% change</th>
<th>Market share</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.3 million visitors</td>
<td>8.5%</td>
<td>52.2% 0.4% pts</td>
</tr>
<tr>
<td>94.5 million nights</td>
<td>5.1%</td>
<td>35.1% 0.8% pts</td>
</tr>
<tr>
<td>$10.5 billion</td>
<td>7.0%</td>
<td>36.1% 0.1% pts</td>
</tr>
</tbody>
</table>

**Domestic daytrip travel**²

<table>
<thead>
<tr>
<th>Estimate</th>
<th>% change</th>
<th>Market share</th>
</tr>
</thead>
<tbody>
<tr>
<td>59.0 million visitors</td>
<td>5.4%</td>
<td>30.2% 0.3% pts</td>
</tr>
<tr>
<td>$6.3 billion</td>
<td>9.5%</td>
<td>30.3% 0.9% pts</td>
</tr>
</tbody>
</table>

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**

- **Domestic overnight**
  - Visitors: 61.7%
  - Nights: 51.7%
  - Expenditure: 53.4%
  - Visitors: 33.8%
  - Nights: 48.3%
  - Expenditure: 17.5%

* 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 Travel

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

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, 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)

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.
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

<table>
<thead>
<tr>
<th>Rank</th>
<th>Origin</th>
<th>Visitors ('000)</th>
<th>%</th>
<th>Visitor nights ('000)</th>
<th>Spend in NSW ($ million)</th>
<th>Average spend per night</th>
<th>Average length of stay in NSW ('000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mainland China</td>
<td>792</td>
<td>3.3</td>
<td>19,392</td>
<td>3,245</td>
<td>167</td>
<td>24.5</td>
</tr>
<tr>
<td>2</td>
<td>USA</td>
<td>494</td>
<td>3.3</td>
<td>4,916</td>
<td>762</td>
<td>155</td>
<td>10.0</td>
</tr>
<tr>
<td>3</td>
<td>New Zealand</td>
<td>445</td>
<td>3.6</td>
<td>3,596</td>
<td>467</td>
<td>130</td>
<td>8.1</td>
</tr>
<tr>
<td>4</td>
<td>United Kingdom</td>
<td>383</td>
<td>4.0</td>
<td>7,553</td>
<td>701</td>
<td>93</td>
<td>19.7</td>
</tr>
<tr>
<td>5</td>
<td>South Korea</td>
<td>222</td>
<td>4.3</td>
<td>5,690</td>
<td>633</td>
<td>111</td>
<td>25.6</td>
</tr>
<tr>
<td>6</td>
<td>Japan</td>
<td>171</td>
<td>3.1</td>
<td>3,376</td>
<td>358</td>
<td>106</td>
<td>19.7</td>
</tr>
<tr>
<td>7</td>
<td>India</td>
<td>158</td>
<td>3.9</td>
<td>5,954</td>
<td>358</td>
<td>60</td>
<td>37.7</td>
</tr>
<tr>
<td>8</td>
<td>Hong Kong</td>
<td>147</td>
<td>4.6</td>
<td>2,969</td>
<td>247</td>
<td>12</td>
<td>19.0</td>
</tr>
<tr>
<td>9</td>
<td>Germany</td>
<td>135</td>
<td>3.1</td>
<td>2,930</td>
<td>223</td>
<td>76</td>
<td>21.7</td>
</tr>
<tr>
<td>10</td>
<td>Singapore</td>
<td>118</td>
<td>2.7</td>
<td>1,173</td>
<td>245</td>
<td>209</td>
<td>9.9</td>
</tr>
<tr>
<td>Other markets</td>
<td>1,284</td>
<td>29.6%</td>
<td></td>
<td>37,351</td>
<td>3,159</td>
<td>85</td>
<td>29.1</td>
</tr>
<tr>
<td>Total NSW</td>
<td>4,338</td>
<td></td>
<td></td>
<td>94,520</td>
<td>10,497</td>
<td>111</td>
<td>21.8</td>
</tr>
</tbody>
</table>

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)\(6\)

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

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.

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.

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.