Travel to Blue Mountains
Year ended June 2018
For the period of July 2017 to June 2018

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

Domestic Overnight Travel¹

<table>
<thead>
<tr>
<th>Visitors and nights</th>
<th>YE Jun 14</th>
<th>YE Jun 15</th>
<th>YE Jun 16</th>
<th>YE Jun 17</th>
<th>YE Jun 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors ('000)</td>
<td>805</td>
<td>864</td>
<td>945</td>
<td>1,068</td>
<td>1,774</td>
</tr>
<tr>
<td>Nights ('000)</td>
<td></td>
<td></td>
<td></td>
<td>2,068</td>
<td>2,214</td>
</tr>
<tr>
<td>Total</td>
<td>1,009</td>
<td>1,728</td>
<td>2,913</td>
<td>3,136</td>
<td>3,488</td>
</tr>
</tbody>
</table>

Blue Mountains received nearly 1.1 million domestic overnight visitors - up by 11.0% on YE Jun 17. Visitors spent over 2.4 million nights in the region - up by 8.1% on YE Jun 17.

Note: The number of domestic overnight trips to regional New South Wales increased by 9.4 percent* on last year and by 26.4 percent* compared to four years ago.

Market share

The region received 4.6% of visitors and 3.2% of nights in regional NSW. Compared to YE Jun 17, the share of visitors was up by 0.1% pt and the share of nights was unchanged.

Purpose of visit to Blue Mountains

`'Holiday' (62.0%) was the largest purpose of visit for visitors to the region, followed by 'visiting friends and relatives' (VFR') (28.1%) and ‘business’ (7.6%). Compared to YE Jun 17, visitors who travelled for ‘holiday’ grew by 16.8%* and ‘VFR’ increased by 5.6% while ‘business’ grew by 12.8%.

‘Holiday’ (56.5%) was the largest purpose in terms of nights in the region, followed by ‘VFR’ (33.4%) and ‘business’ (7.6%). Compared to YE Jun 17, nights spent for ‘holiday’ declined by 2.9% while ‘VFR’ grew by 38.5% and ‘business’ increased by 9.9%.

Accommodation in Blue Mountains

‘Friends or relatives property’ (36.4%) was the most popular accommodation used for nights in the region. ‘Rented house, apartment, flat or unit’ (11.8%) was the 2nd most popular accommodation, followed by ‘standard hotel or motor inn, below 4 star’ (10.5%).

Sydney (65.5%) was the largest source of visitors to the region, followed by regional NSW (23.3%) and the ACT (3.8%). Compared to YE Jun 17, the Sydney source market grew by 26.2%* while regional NSW declined by 1.2%. Over the same period, the ACT grew by 99.3%* and Queensland increased by 1.8% while Victoria declined by 66.1%*.

Sydney (57.8%) was the largest source market in terms of nights in the region, followed by regional NSW (27.4%) and Queensland (5.7%). Compared to YE Jun 17, nights spent by visitors from Sydney grew by 23.5% and nights from regional NSW increased by 3.5%. Over the same period, Queensland nights grew by 43.5% and nights by visitors from the ACT increased by 166%* while Victorian nights declined by 74.3%.

Top activities in Blue Mountains

‘Eat out, dine at a restaurant or cafe’ (57.5%) was the most popular activity undertaken by visitors to the region. ‘Bushwalking or rainforest walks’ (47.2%) was the 2nd most popular activity, followed by ‘visit national parks or state parks’ (43.3%).

Age groups

‘15 to 29 years’ (29.5%) was the largest age group of visitors to the region, followed by ‘40 to 49 years’ (20.3%) and ‘50 to 59 years’ (16.8%).

Travel party

‘Adult couple’ (30.1%) was the most common travel party amongst visitors to the region, followed by ‘friends and relatives’ (29.4%) and ‘family group’ (17.2%).

Expenditure (incl airfares and transport costs)³

Domestic overnight visitors spent $387 million in the region - up by 0.3% on YE Jun 17. On average, they spent $158 per night - down by 7.2% on YE Jun 17.

³ Source: TRA’s expenditure allocation method applied to NVS data, YE Jun 18.
Blue Mountains received 127,200 international overnight visitors - up by 14.0%* on YE Jun 17. Visitors spent 773,300 nights in the region - up by 13.0% on YE Jun 17.

Note: The number of overnight trips to regional New South Wales by international visitors increased by 6.2 percent* on last year and by 40.4 percent* compared to four years ago.

Market share

The region received 14.7% of visitors and 5.4% of nights in regional NSW. Compared to YE Jun 17, the share of visitors was up by 1.0% pt and the share of nights was up by 0.8% pts.

Origin – share of visitors to Blue Mountains

<table>
<thead>
<tr>
<th>Rank</th>
<th>Individual market</th>
<th>Share of international visitors to Blue Mountains</th>
<th>YE Jun 17</th>
<th>YE Jun 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United Kingdom</td>
<td>宣</td>
<td>18.1%</td>
<td>18.1%</td>
</tr>
<tr>
<td>2</td>
<td>Europe</td>
<td>宣</td>
<td>10.3%</td>
<td>11.3%</td>
</tr>
<tr>
<td>3</td>
<td>USA</td>
<td>宣</td>
<td>11.2%</td>
<td>8.7%</td>
</tr>
<tr>
<td>4</td>
<td>New Zealand</td>
<td>宣</td>
<td>7.7%</td>
<td>6.7%</td>
</tr>
<tr>
<td>5</td>
<td>Other Countries</td>
<td>宣</td>
<td>6.9%</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

The United Kingdom (18.1%) was the largest individual source market of visitors to the region, followed by Germany (9.5%).

Accommodation in Blue Mountains

‘Friends or relatives property’ (46.7%) was the most popular form of accommodation used for nights in the region, followed by ‘standard hotel or motor inn, below 4 star’ (8.0%).

Age groups

‘15 to 29 years’ (32.6%) was the largest age group of visitors to the region, followed by ‘50 to 59 years’ (16.6%) and ‘60 to 69 years’ (16.6%).

Expenditure (incl 30% prepaid package expenditure)

International overnight visitors spent $56 million in the region – down by 15.3% on YE Jun 17. On average, they spent $72 per night region - down by 25.1% on YE Jun 17.

(4) Source: TRA’s expenditure allocation method applied to IVS data, YE Jun 18.

Preliminary IVS results

Due to quality issues with the incoming passenger data, IVS results for the YE Jun 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 Jun 18 are preliminary.

* The percentage change is statistically significant.

np = Not published due to insufficient sample.