

International Youth Travel# to NSW - preliminary

Year ended March 2018

For the period of April 2017 to March 2018



Source: International Visitor Survey (IVS), YE Mar 18, TRA - unless otherwise specified.

Overview

	Visitors to ('000)	Nights in (million)	Total spend (\$ million)	Spend per visitor (\$)	Spend per night (\$)
NSW	1,303	51.4	\$5,656	\$4,339	\$110
Australia	2,350	146.2	\$15,457	\$6,578	\$106

NSW received over 1.3 million international youth visitors - up by 0.6% on YE Mar 17. International youth visitors spent over 51.4 million nights in the State - up marginally on YE Mar 17.

NSW received 55.5% of international youth visitors and 35.2% of international youth nights in Australia. Compared to YE Mar 17, the share of visitors was down by 0.6% pts and the share of nights was up by 0.1% pt.

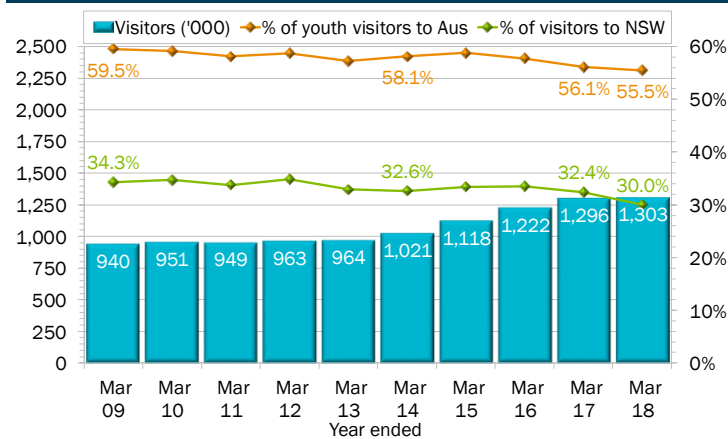
International youth travellers contributed 30.0% of visitors and 54.4% of nights in the State. Compared with YE Mar 17, the contribution to visitors was down by 2.4% pts and the contribution to nights was down by 2.8% pts.

The average length of stay in NSW by international youth visitors was 39.5 nights - down by 0.2 nights on YE Mar 17. This is substantially longer than the average stay for all international visitors to the State (21.8 nights).

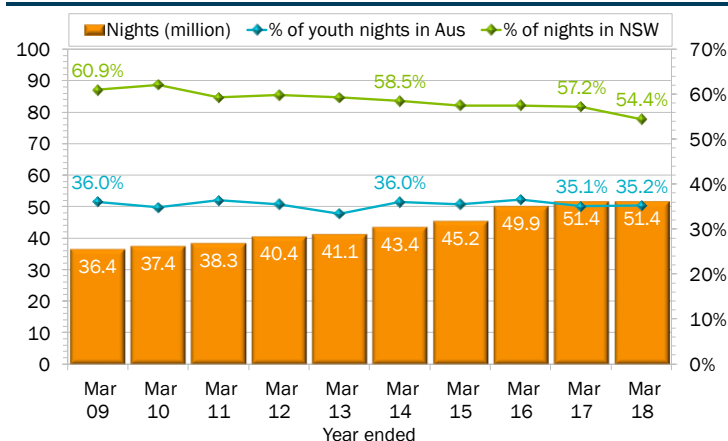
International youth visitors spent nearly \$5.7 billion in NSW (incl package expenditure) - up by 4.7% on YE Mar 17. This represented 36.6% of total expenditure by international youth visitors in Australia. On average, international youth visitors spent \$4,339 per visitor and \$110 per night in NSW. (1)

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

Overnight visitors



Visitor nights



Origin

Rank	Origin	Youth visitors ('000)	%	Youth visitor nights ('000)	Spend in NSW (\$ million)	Average spend per night NSW	Average length of stay in NSW
1	Mainland China	205	15.7%	11,808	\$2,204	\$187	57.7
2	United Kingdom	133	10.2%	3,964	\$322	\$81	29.9
3	USA	123	9.4%	2,195	\$237	\$108	17.9
4	New Zealand	110	8.5%	1,372	\$132	\$96	12.4
5	Germany	69	5.3%	2,210	\$130	\$59	32.1
6	Japan	65	5.0%	2,162	\$180	\$83	33.5
7	South Korea	58	4.4%	3,914	\$316	\$81	67.7
8	France	39	3.0%	1,691	\$108	\$64	42.9
9	Taiwan	34	2.6%	1,860	\$118	\$63	55.2
10	Canada	33	2.5%	883	\$68	\$77	26.6
11	India	33	2.5%	2,150	\$197	\$92	64.9
12	Hong Kong	33	2.5%	1,471	\$183	\$125	44.6
13	Malaysia	32	2.5%	1,020	\$115	\$113	31.8
14	Singapore	29	2.2%	451	\$82	\$181	15.8
15	Indonesia	27	2.0%	1,310	\$128	\$98	49.4
16	Philippines	19	1.5%	736	\$47	\$64	38.0
17	Italy	18	1.4%	1,103	\$75	\$68	61.8
18	Netherlands	16	1.2%	410	\$33	\$81	25.9
19	Switzerland	12	1.0%	279	\$31	\$111	22.3
20	Ireland	12	1.0%	554	\$46	\$83	44.6
21	Thailand	11	0.8%	877	\$78	\$89	83.3
	Other Asia	28	2.1%	2,283	\$267	\$117	82.0
	Scandinavia	35	2.7%	937	\$80	\$86	26.8
	Other Europe	41	3.1%	1,692	\$130	\$77	41.6
	Other	90	6.9%	4,120	\$348	\$85	45.6
	Total	1,303		51,450	\$5,656	\$110	39.5

Mainland China (204,700 or 15.7%) was the largest source market of international youth visitors to NSW, followed by the United Kingdom (132,600 or 10.2%) and the USA (122,800 or 9.4%). Compared to YE Mar 17, visitors from Mainland China grew by 2.1% while UK visitors declined by 2.8% and US visitors decreased by 0.9%.

Mainland China (11.8 million or 23.0%) was the biggest contributor of international youth visitor nights in the State, followed by the United Kingdom (4.0 million or 7.7%) and South Korea (3.9 million or 7.6%). Compared to YE Mar 17, visitor nights from Mainland China grew by 0.3% while visitor nights from the United Kingdom declined by 17.0%* and visitor nights from South Korea decreased by 2.5%.

Youth visitors from Mainland China spent the most in the State (\$2.2 billion), followed by visitors from the United Kingdom (\$322 million) and visitors from South Korea (\$316 million). Compared to YE Mar 17, expenditure by Mainland Chinese visitors grew by 10.5%* while spend by visitors from the UK declined by 9.6% and spend by South Korean visitors decreased by 9.1%.

Youth visitors from Mainland China (\$187) had the highest average spend per night in NSW, followed by Singaporean visitors (\$181) and visitors from Hong Kong (\$125).

Length of stay

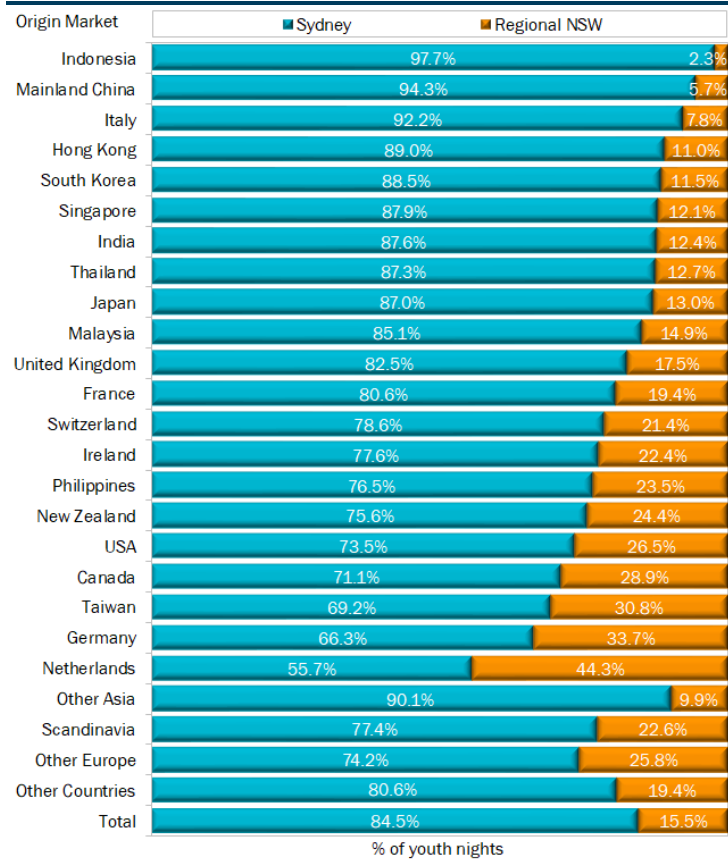
International youth visitors stayed on average 39.5 nights in NSW, while their average stay in Australia was 62.2 nights. The median length of stay in the State was 7 nights compared to 17 nights in Australia. Compared to YE Mar 17, the average stay in the State was down by 0.2 nights and the median stay in NSW was unchanged.

Youth visitors from Thailand (83.3 nights) had the longest average stay in NSW, followed by South Korean visitors (67.7 nights) and visitors from India (64.9 nights).

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

* The percentage change is statistically significant.

Destinations in NSW

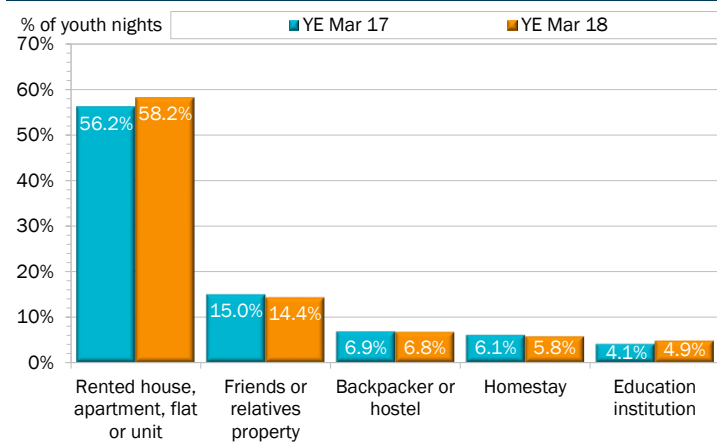


International youth visitors spent 84.5% of their nights in Sydney - down by 0.3 % pts on YE Mar 17.

Youth visitors from Indonesia (97.7%) had the highest proportion of nights spent in Sydney, followed by Mainland Chinese visitors (94.3%) and visitors from Italy (92.2%).

Youth visitors from Netherlands (44.3%) had the highest proportion of nights in regional NSW, followed by German visitors (33.7%) and visitors from Taiwan (30.8%).

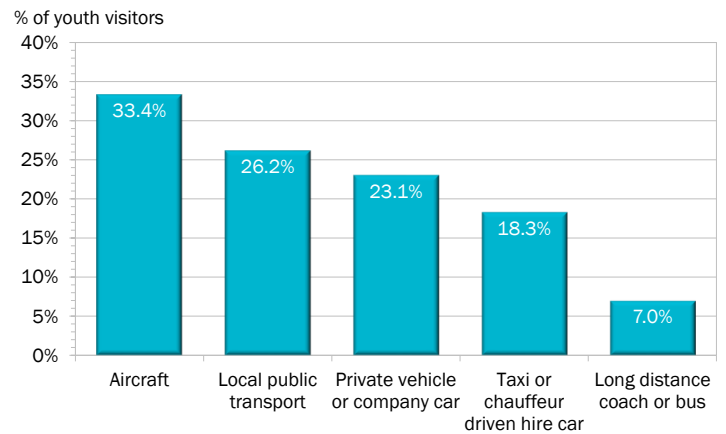
Accommodation in NSW



'Rented house, apartment, flat or unit' (58.2%) was the most popular accommodation type used for nights in NSW by international youth visitors, followed by 'friends or relatives property' (14.4%) and 'backpacker or hostel' (6.8%).

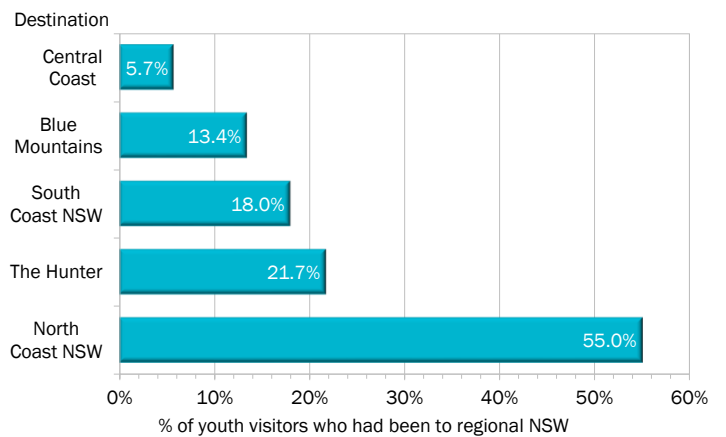
Compared to YE Mar 17, 'rented house, apartment, flat or unit' grew by 2.0 pts while 'friends or relatives property' declined by 0.6 pts.

Transport in NSW



'Aircraft' (33.4%) was the most popular mode of transport used to destinations in NSW by international youth visitors. 'Local public transport' (26.2%) was the 2nd most popular, followed by 'private vehicle or company car' (23.1%).

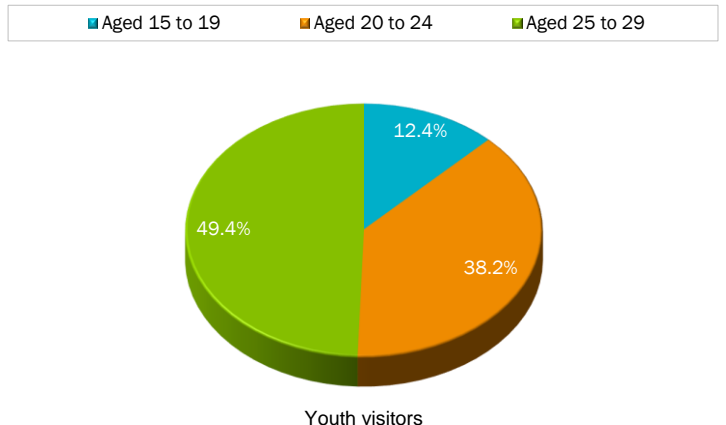
Destinations in regional NSW



Nearly ¼ (24.0%) of international youth visitors to NSW had a stopover in regional NSW.

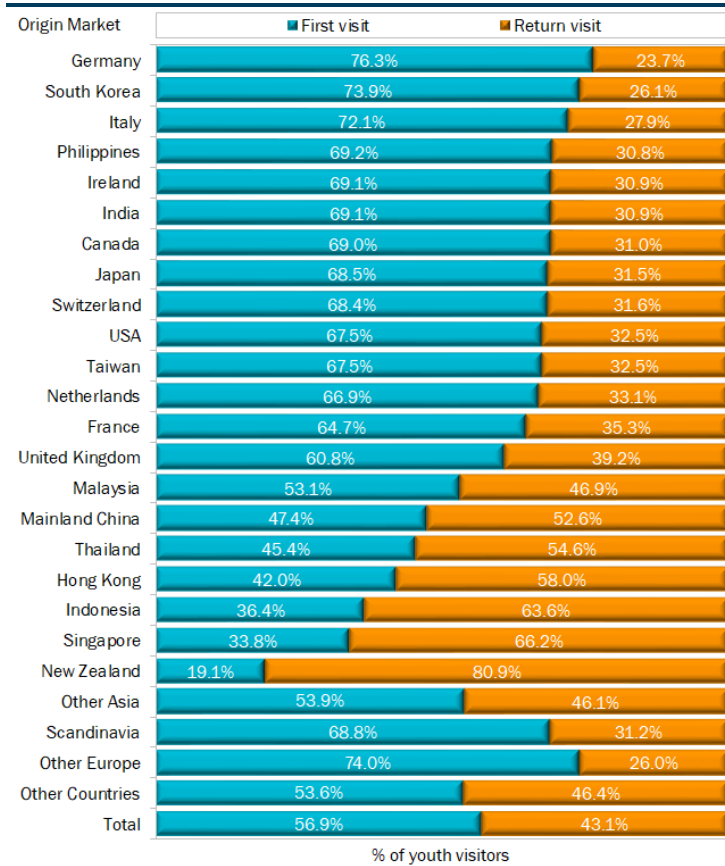
'North Coast NSW' (55.0%) was the most popular destination visited in regional NSW by international youth visitors. 'The Hunter' (21.7%) was the 2nd most popular, followed by 'South Coast NSW' (18.0%).

Age



Nearly ½ (49.4%) of international youth visitors who had been to NSW were 'aged 25 to 29'. 'Aged 20 to 24' (38.2%) was the 2nd biggest age range, followed by 'aged 15 to 19' (12.4%).

First or return visitor



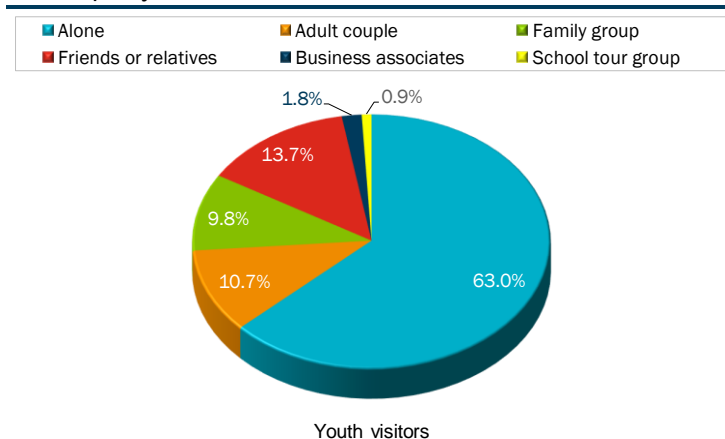
Most international youth visitors who had been to NSW (56.9%), were on their first visit to Australia - up by 1.9 % pts on YE Mar 17.

International youth visitors who had been to the State:

German youth visitors (76.3%) had the highest percentage of first time travellers to Australia, followed by South Koreans (73.9%) and visitors from Italy (72.1%).

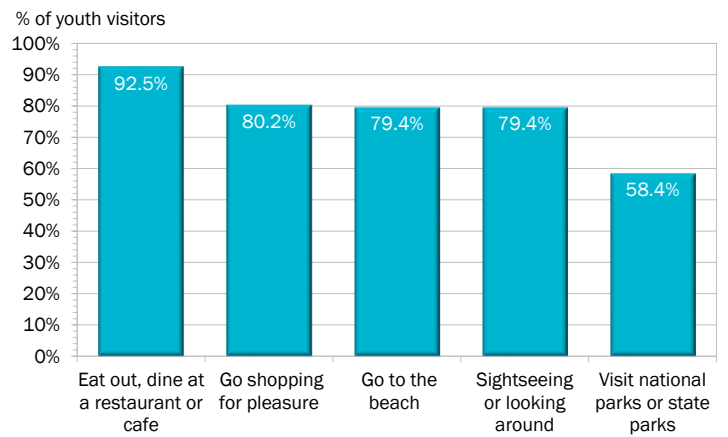
New Zealand youth visitors (80.9%) had the highest proportion of return travellers, followed by Singaporeans (66.2%) and visitors from Indonesia (63.6%).

Travel party



Over 3/5 (63.0%) of international youth visitors who had been to NSW arrived in Australia 'alone'. Their 2nd most common travel party description was 'friends or relatives' (13.7%), followed by 'adult couple' (10.7%).

Top activities in Australia



'Eat out, dine at a restaurant or cafe' (92.5%) was the most popular activity undertaken during the trip to Australia by international youth visitors who had been to NSW.

Travel package

Nearly 1/10 (7.9%) of international youth visitors who had been to NSW, arrived in Australia on a travel package.

'All accommodation' (77.2%) was the most popular travel arrangement included in the package (other than 'international airfares'), followed by 'airfares within Australia' (58.8%) and 'most ground transport within Australia' (53.0%).

Group tour

Nearly 1/25 (3.7%) of international youth visitors who had been to NSW, arrived in Australia as part of a group tour.

'Guided holiday' (67.1%) was the most common group tour amongst youth visitors. 'School excursion' (20.3%) was the 2nd most common, followed by 'business or convention' (8.9%).

Overview - Australia

Australia received over 2.3 million international youth visitors who spent nearly 146.2 million nights in Australia - up by 1.8% and down by 0.4% respectively on YE Mar 17. On average, youth visitors stayed for 62.2 nights in Australia - down by 1.3 nights on YE Mar 17.

International youth visitors spent nearly \$15.5 billion (incl package expenditure) while in Australia - up by 5.1%* on YE Mar 17. On average, they spent \$6,578 per visitor and \$106 per night.

Preliminary 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.

Definition and further information

An 'international youth traveller' is an overseas visitor to Australia for a period of no more than 12 months, aged 15 to 29 years, who visited NSW.

Please see www.destinationnsw.com.au for detailed profiles on international backpackers, working holiday makers, each of the NSW top international country markets, domestic visitors to the State and travel to NSW's regions.