

International Travel to NSW - preliminary

Year ended June 2018

For the period of July 2017 to June 2018

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



Overview

NSW received over 4.3 million international overnight visitors - up by 5.9%* on YE Jun 17. Visitors spent over 94.4 million nights in the State - up by 2.1% on YE Jun 17.

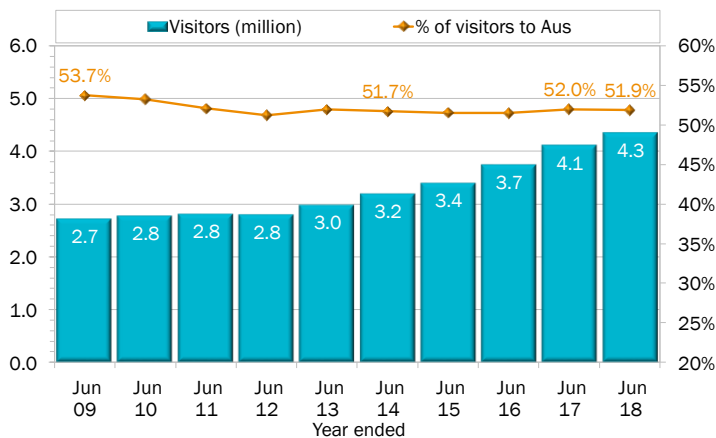
NSW received 51.9% of visitors and 35.0% of nights in Australia. Compared to YE Jun 17, the share of visitors was down by 0.1% pt and the share of nights was up by 0.2% pts.

The average length of stay in NSW was 21.8 nights - down by 0.8 nights on YE Jun 17.

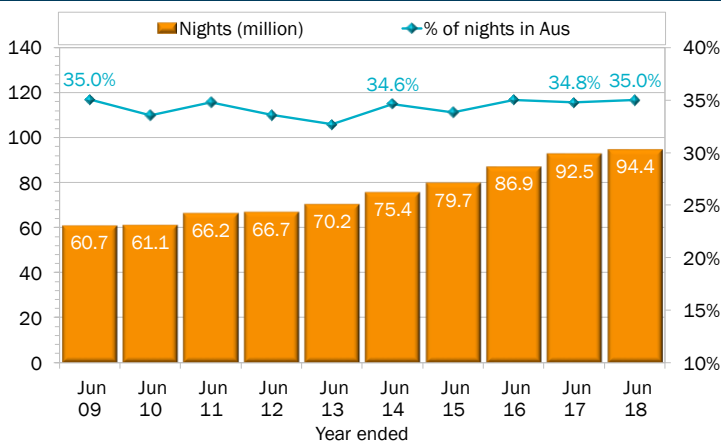
International overnight visitors spent \$10.5 billion in NSW (incl package expenditure) - up by 3.9% on YE Jun 17. This represented 35.9% of total expenditure in Australia. On average, visitors spent \$2,418 per visitor and \$111 per night in NSW. ⁽¹⁾

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

Overnight visitors



Visitor nights



Forecast

NSW nights 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%. ⁽²⁾

International visitors to Australia are expected to increase from nearly 8.6 million# in 2016/17 to over 15.0 million# in 2026/27, an average annual growth rate of 5.8%. ⁽³⁾

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

(3) Source: Tourism Forecasts, 2017, TRA

Includes children less than 15 years

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

* The percentage change is statistically significant.

Origin

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	793	18.3%	19,597	3,370	172	24.7
2	USA	490	11.3%	4,624	728	157	9.4
3	New Zealand	445	10.3%	3,493	465	133	7.8
4	United Kingdom	378	8.7%	7,064	654	93	18.7
5	South Korea	221	5.1%	5,695	647	114	25.7
6	Japan	172	4.0%	3,467	369	106	20.2
7	India	158	3.7%	6,269	343	55	39.6
8	Germany	131	3.0%	2,953	222	75	22.5
9	Hong Kong	131	3.0%	2,613	334	128	20.0
10	Singapore	120	2.8%	1,329	256	193	11.1
11	Canada	104	2.4%	1,577	156	99	15.2
12	Taiwan	94	2.2%	2,813	236	84	29.8
13	Malaysia	89	2.0%	1,787	194	108	20.1
14	Indonesia	83	1.9%	2,162	199	92	26.1
15	France	79	1.8%	2,326	194	83	29.4
16	Philippines	66	1.5%	1,759	120	68	26.7
17	Thailand	48	1.1%	1,947	158	81	40.7
18	Italy	45	1.0%	1,579	105	66	35.2
19	Netherlands	35	0.8%	588	58	98	16.7
20	Switzerland	33	0.8%	455	55	122	13.8
21	Ireland	30	0.7%	779	68	87	25.9
	Other Asia	118	2.7%	5,583	485	87	47.4
	Scandinavia	73	1.7%	1,202	123	102	16.6
	Other Europe	117	2.7%	3,301	279	85	28.3
	Other Countries	284	6.6%	9,456	668	71	33.3
	Total NSW	4,338		94,420	10,487	111	21.8

Mainland China (793,200 or 18.3%) was the largest source market of international visitors to NSW, followed by the USA (490,300 or 11.3%) and New Zealand (445,100 or 10.3%). Compared to YE Jun 17, visitors from Mainland China grew by 10.6%* and US visitors increased by 7.2%* while New Zealand visitors declined by 0.3%.

Mainland China (19.6 million or 20.8%) was the biggest contributor of international visitor nights in the State, followed by the United Kingdom (7.1 million or 7.5%) and India (6.3 million or 6.6%). Compared to YE Jun 17, visitor nights from Mainland China declined by 1.1% and visitor nights from the United Kingdom decreased by 16.0%* while visitor nights from India grew by 16.1%*.

Visitors from Mainland China spent the most in the State (\$3.4 billion), followed by US visitors (\$728 million) and visitors from the United Kingdom (\$654 million). Compared to YE Jun 17, expenditure by Mainland Chinese visitors grew by 11.9%* while spend by visitors from the USA declined by 9.0% and spend by UK visitors decreased by 15.0%*.

Visitors from Singapore (\$193) had the highest average spend per night in NSW, followed by Mainland Chinese visitors (\$172) and visitors from the USA (\$157).

Length of stay

International visitors stayed on average 21.8 nights in NSW, while their average stay in Australia was 32.2 nights. The median length of stay in the State was 5 nights compared to 10 nights in Australia. Compared to YE Jun 17, the average in NSW was down by 0.8 nights and the median stay was unchanged.

Visitors from Thailand (40.7 nights) had the longest average stay in NSW, followed by Indian visitors (39.6 nights) and visitors from Italy (35.2 nights).

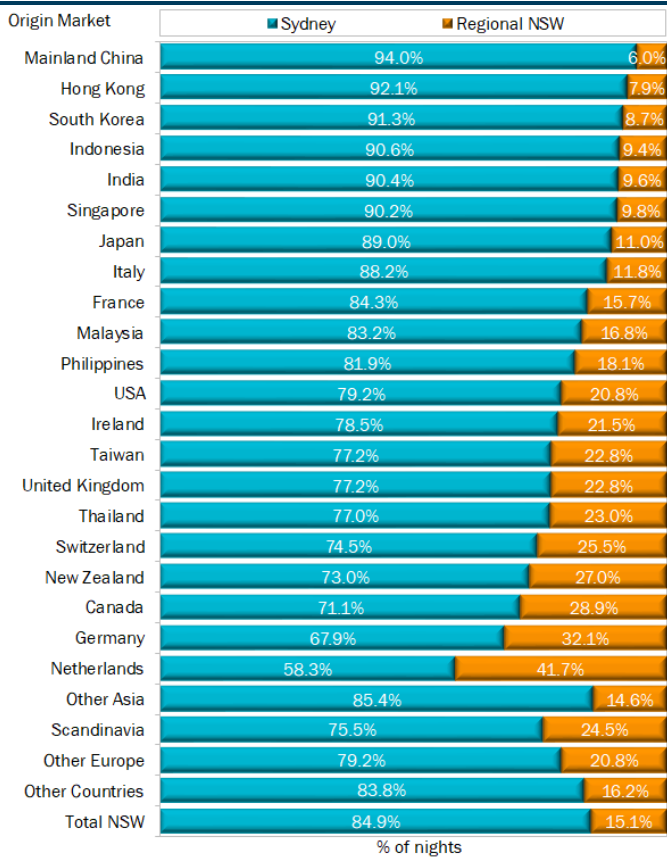
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Destinations in NSW

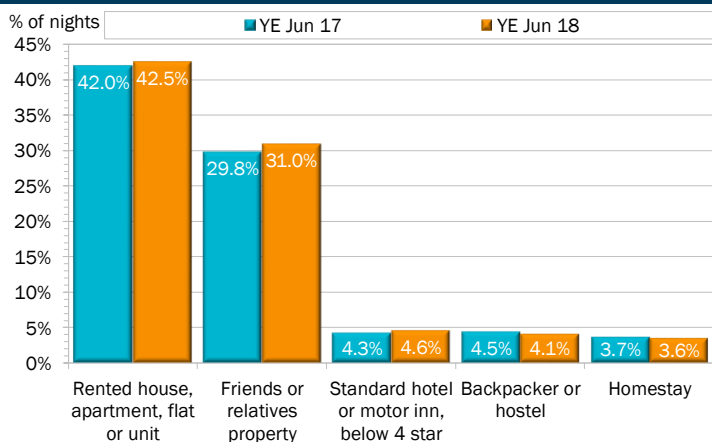


International overnight visitors spent 84.9% of their nights in Sydney – up by 0.9% pts on YE Jun 17.

Visitors from Mainland China (94.0%) had the highest proportion of nights spent in Sydney. Hong Kong visitors (92.1%) had the 2nd highest proportion, followed by South Koreans (91.3%).

Visitors from Netherlands (41.7%) had the highest proportion of nights in regional NSW. German visitors (32.1%) had the 2nd highest proportion, followed by Canadians (28.9%).

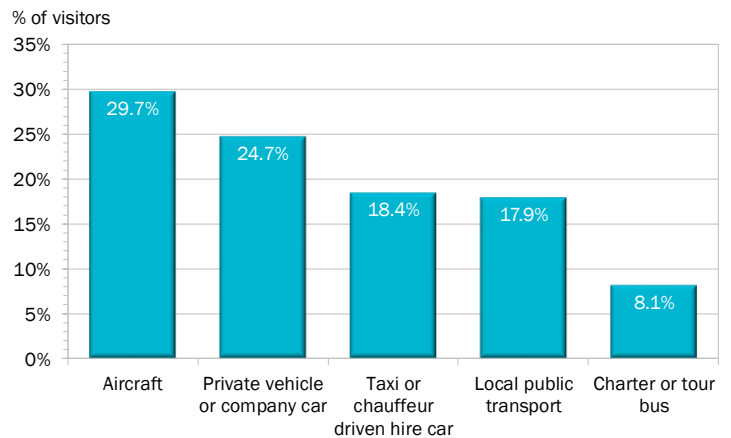
Accommodation in NSW



'Rented house, apartment, flat or unit' (42.5%) was the most popular accommodation type used for nights in NSW by international visitors, followed by 'friends or relatives property' (31.0%) and 'standard hotel or motor inn, below 4 star' (4.6%).

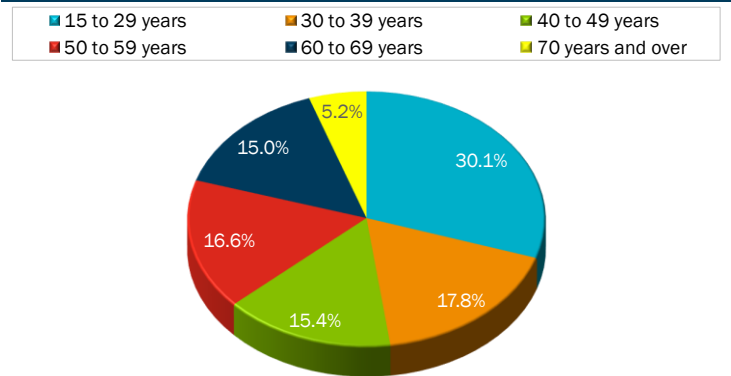
Compared to YE Jun 17, 'friends or relatives property' increased by 1.2% pts while 'backpacker or hostel' decreased by 0.4% pts.

Transport in NSW



'Aircraft' (29.7%) was the most popular mode of transport used to destinations in NSW by international overnight visitors. 'Private vehicle or company car' (24.7%) was the 2nd most popular transport mode used, followed by 'taxi or chauffeur driven hire car' (18.4%).

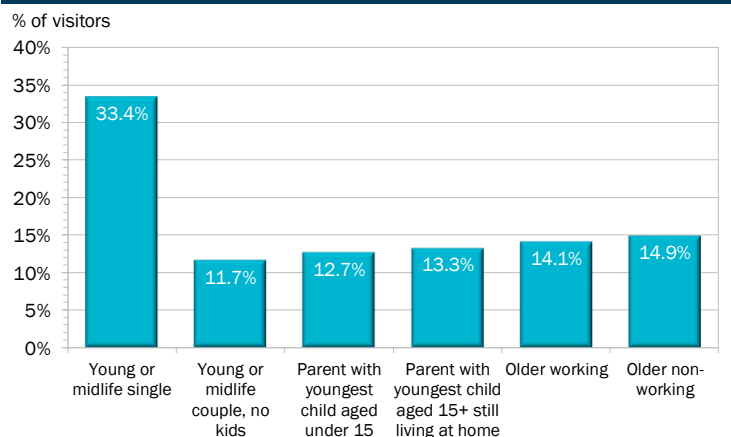
Age groups



Visitors

'15 to 29 years' (30.1%) was the biggest age group amongst international overnight visitors to NSW. '30 to 39 years' (17.8%) was the 2nd biggest age group, followed by '50 to 59 years' (16.6%).

Lifecycle groups



'Young or midlife single' (33.4%) was the most common lifecycle grouping amongst international overnight visitors who had been to NSW. 'Older non-working' (14.9%) was the 2nd most common lifecycle grouping, followed by 'older working' (14.1%).

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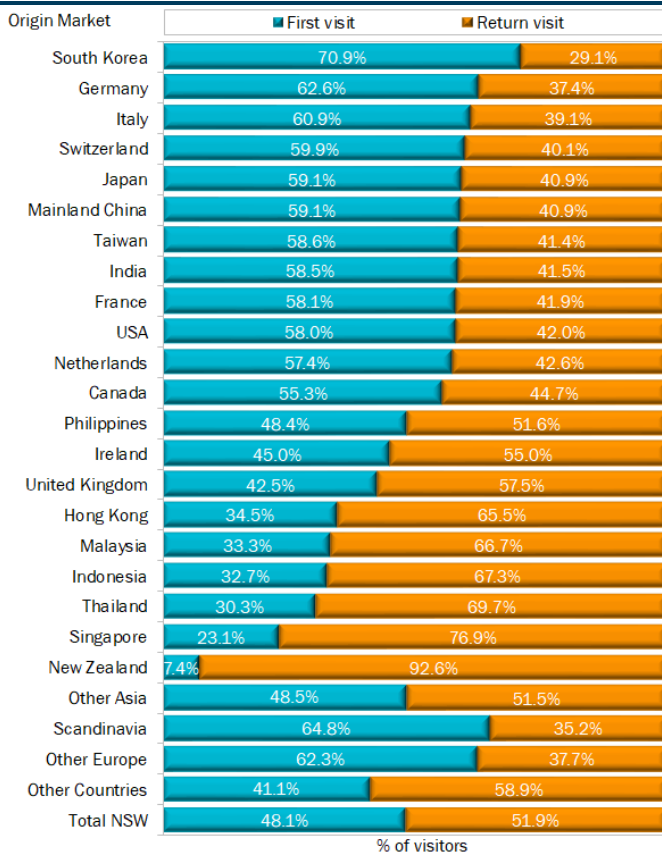
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Preliminary	YE Jun 18	YE Jun 17	YE on YE growth
Visitors to NSW (million)	4.3	4.1	5.9%
Nights in NSW (million)	94.4	92.5	2.1%
Expenditure in NSW (billion)	\$10.5	\$10.1	3.9%
Expenditure per night in NSW	\$111	\$109	1.8%

First or return visitor



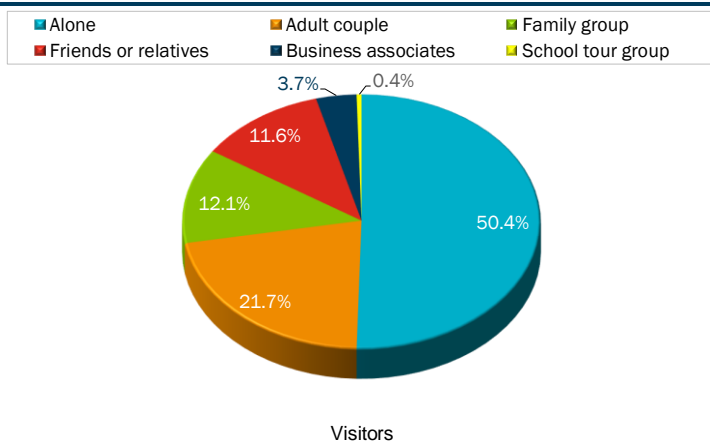
Most international overnight visitors who had been to NSW (51.9%), were on a return trip to Australia – up by 0.3% pts on YE Jun 17.

International overnight visitors who had been to the State:

South Korean visitors (70.9%) had the highest percentage of first time travellers to Australia. Visitors from Germany (62.6%) had the 2nd highest proportion, followed by Italian visitors (60.9%).

New Zealand visitors (92.6%) had the highest proportion of repeat travellers. Visitors from Singapore (76.9%) had the 2nd highest proportion, followed by Thai visitors (69.7%).

Travel party

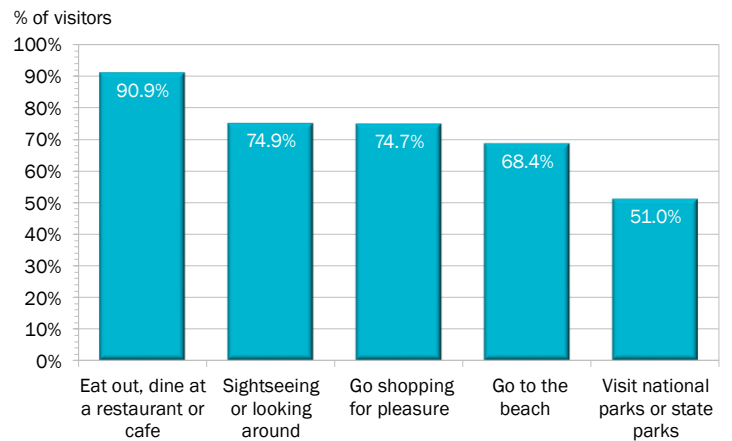


Over ½ (50.4%) of international overnight visitors who had been to NSW arrived in Australia 'alone'. Their 2nd most common travel party description was 'adult couple' (21.7%), followed by 'family group' (12.1%).

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

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Top activities in Australia



'Eat out, dine at a restaurant or cafe' (90.9%) was the most popular activity undertaken during the trip to Australia by international overnight visitors who had been to NSW. 'Sightseeing or looking around' (74.9%) was the 2nd most popular activity, followed by 'go shopping for pleasure' (74.7%).

Travel package

Nearly 1/5 (17.4%) of international overnight visitors who had been to NSW, arrived in Australia on a travel package.

'All accommodation' (86.2%) was the most popular travel arrangement included in the package (other than 'international airfares'). 'Most ground transport within Australia' (71.1%) was the 2nd most popular arrangement included, followed by 'airfares within Australia' (67.8%).

Group tour

Over 1/10 (11.4%) of international overnight visitors who had been to NSW, arrived in Australia as part of a group tour.

'Guided holiday' (89.0%) was the most common group tour. 'Business or convention' (5.0%) was the 2nd most common group tour, followed by 'school excursion' (3.0%).

Overview - Australia

Australia received nearly 8.4 million international visitors who spent nearly 269.7 million nights in Australia – up by 6.2%* and by 1.4% respectively on YE Jun 17. On average, they stayed for 32.2 nights - down by 1.5 nights on YE Jun 17.

Visitors spent over \$29.2 billion (incl package expenditure) while in Australia - up by 4.8%* on YE Jun 17. On average, they spent \$3,492 per visitor and \$108 per night in Australia. ⁽¹⁾

Preliminary 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.

Notes and further information

An international visitor = an international resident, aged 15 and over, who visited Australia for a period of no more than 12 months.

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