

## Overview

TOTAL TRAVEL <sup>(1)</sup>				
Estimate	% change		Market share	
<b>97.4</b> million visitors	7.1%	↑	31.5%	0.1% pt
Aus	6.8%	↑		
<b>197.8</b> million nights	4.4%	↑	31.3%	-0.1% pts
Aus	4.6%	↑		
<b>\$36.8</b> billion	10.6%	↑	31.1%	0.9% pts
Aus	7.3%	↑		

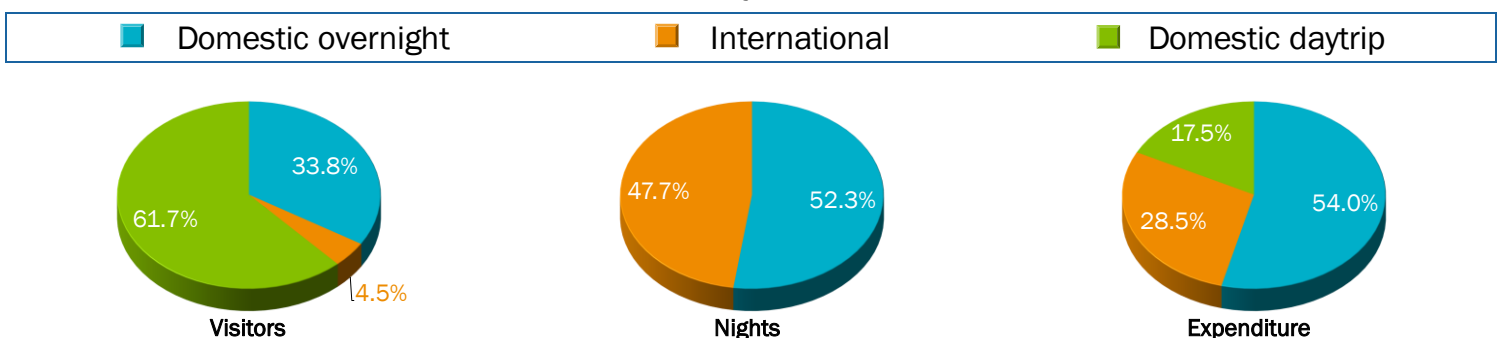
Domestic overnight travel <sup>(2)</sup>				
Estimate	% change		Market share	
<b>32.9</b> million visitors	9.3% *	↑	32.8%	0.7% pts
Aus	7.0% *	↑		
<b>103.3</b> million nights	6.7% *	↑	28.5%	-0.2% pt
Aus	7.1% *	↑		
<b>\$19.8</b> billion	15.2% *	↑	29.4%	1.9% pts
Aus	7.9% *	↑		

International overnight travel <sup>(3)</sup>				
Estimate	% change		Market share	
<b>4.3</b> million visitors	5.9% *	↑	51.9%	-0.1% pts
Aus	6.2% *	↑		
<b>94.4</b> million nights	2.1%	↑	35.0%	0.2% pts
Aus	1.4%	→		
<b>\$10.5</b> billion	3.9%	↑	35.9%	-0.3% pts
Aus	4.8% *	↑		

Domestic daytrip travel <sup>(2)</sup>				
Estimate	% change		Market share	
<b>60.1</b> million visitors	6.0% *	↑	30.0%	-0.2% pts
Aus	6.8% *	↑		
<b>\$6.4</b> billion	8.6% *	↑	30.0%	0.0% pts
Aus	8.6% *	↑		

Due to quality issues with the incoming passenger data, IVS and total travel results for the year ended June 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.

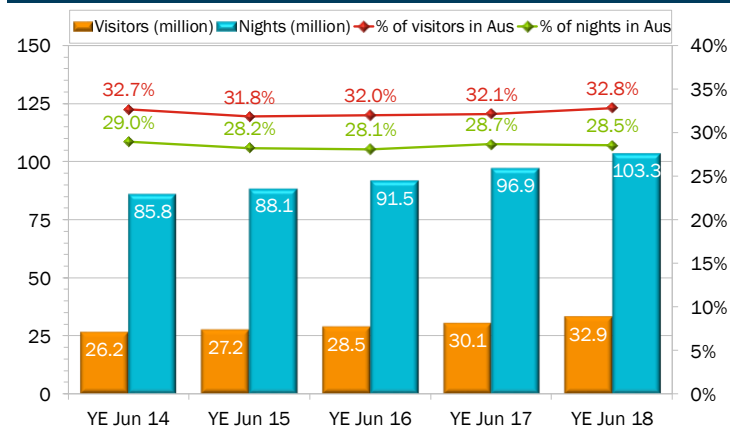
(1) Estimated using data from National Visitor Survey (NVS), International Visitor Survey (IVS) & Tourism Research Australia's (TRA) expenditure allocation method applied to NVS and IVS data, YE Jun 18.

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

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

### Domestic Overnight Travel<sup>4</sup>

#### Visitors and nights

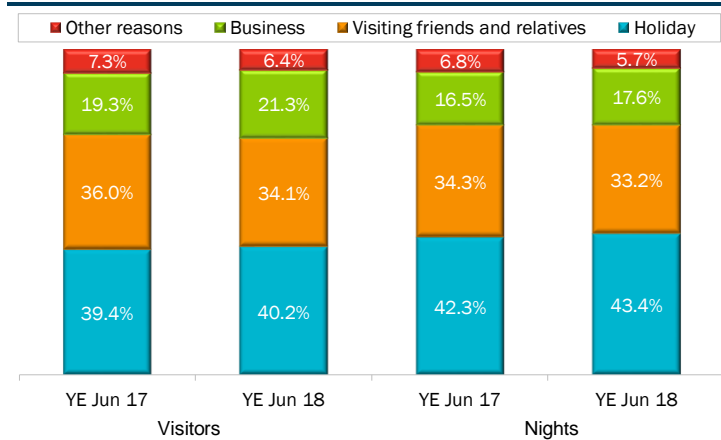


NSW received over 32.9 million domestic overnight visitors - up by 9.3%\* on YE Jun 17. Visitors spent over 103.3 million nights in the State - up by 6.7%\* on YE Jun 17.

#### Market share

NSW received 32.8% of visitors and 28.5% of nights in Australia. Compared to YE Jun 17, the share of visitors was up by 0.7% pts and the share of nights was down by 0.2% pts.

#### Purpose of visit to NSW



'Holiday' (40.2%) was the largest purpose of visit for visitors to NSW, followed by 'visiting friends and relatives (VFR)' (34.1%) and 'business' (21.3%). Compared to YE Jun 17, visitors who travelled for 'holiday' grew by 11.4%\* and 'VFR' increased by 3.6% while 'business' grew by 20.2%\*.

'Holiday' (43.4%) was the largest purpose in terms of nights in the State, followed by 'VFR' (33.2%) and 'business' (17.6%). Compared to YE Jun 17, nights spent for 'holiday' grew by 9.4%\* and 'VFR' increased by 3.4% while 'business' grew by 14.2%\*.

#### Accommodation in NSW

'Friends or relatives property' (38.4%) was the most popular accommodation type used for nights in NSW, followed by 'standard hotel or motor inn, below 4 star' (13.7%) and 'caravan park or commercial camping ground' (9.9%).

Compared to YE Jun 17, 'luxury hotel or resort, 4 or 5 star' grew by 0.9% pts, while 'caravan park or commercial camping ground' decreased by 1.0% pt.

#### 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	12,238	37.2%	34,838	5,907	170	2.8
Sydney	9,451	28.7%	26,601	5,794	218	2.8
Total intrastate	21,688	65.9%	61,439	11,701	190	2.8
Queensland	4,086	12.4%	15,650	2,851	182	3.8
Victoria	3,980	12.1%	13,834	2,904	210	3.5
ACT	1,792	5.4%	5,190	829	160	2.9
Other interstate	1,377	4.2%	7,223	1,546	214	5.2
Total interstate	11,236	34.1%	41,898	8,130	194	3.7
Total NSW	32,924		103,337	19,831	192	3.1

Regional NSW (12.2 million or 37.2%) was the largest source of visitors to the State, followed by Sydney (9.5 million or 28.7%) and Queensland (4.1 million or 12.4%). Compared to YE Jun 17, the regional NSW source market grew by 5.2%\* and Sydney increased by 10.3%\* while Queensland grew by 9.8%\*.

Regional NSW (34.8 million or 33.7%) was the largest source market in terms of nights in the State, followed by Sydney (26.6 million or 25.7%) and Queensland (15.7 million or 15.1%). Compared to YE Jun 17, nights spent by visitors from regional NSW grew by 5.9% and nights from Sydney increased by 9.2%\* while nights by Queenslanders grew by 3.5%.

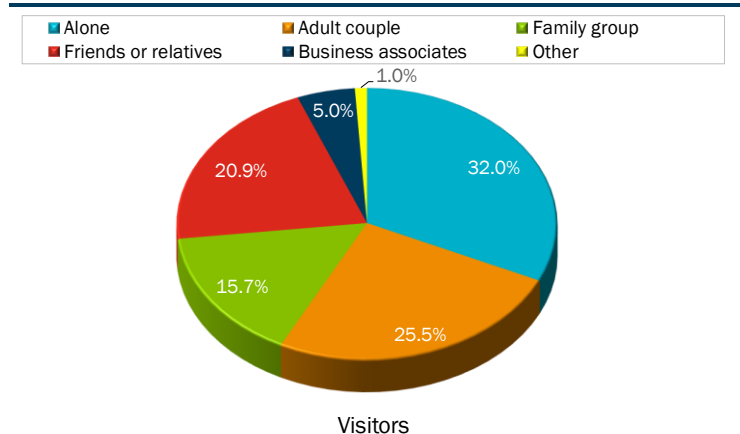
#### Transport in NSW

'Private vehicle or company car' (75.3%) was the most popular form of transport used by visitors to NSW, followed by 'aircraft' (18.5%) and 'railway' (4.4%).

#### Top activities in NSW

'Eat out, dine at a restaurant or cafe' (64.6%) was the most popular activity undertaken by visitors to the State. 'Visit friends and relatives' (43.7%) was the 2<sup>nd</sup> most popular, followed by 'sightseeing or looking around' (24.1%).

#### Travel party



'Alone' (32.0%) was the most common travel party amongst visitors to NSW. 'Adult couple' (25.5%) was the 2<sup>nd</sup> most common, followed by 'friends or relatives' (20.9%).

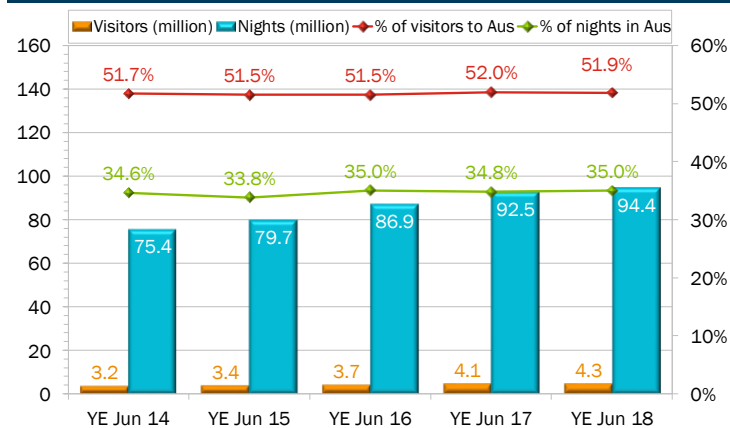
#### Expenditure (incl airfares and transport costs)<sup>6</sup>

Domestic overnight visitors spent \$19.8 billion in NSW - up by 15.2%\* on YE Jun 17. On average, visitors spent \$192 per night in NSW - up by 8.0% on YE Jun 17.

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

## International Overnight Travel<sup>5</sup> - preliminary

### Visitors and nights



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.

### Market share

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.

### 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	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
	Other markets	1,297	29.9%	37,315	3,097	83	28.8
	Total NSW	4,338		94,420	10,487	111	21.8

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

### Expenditure (incl 30% prepaid package expenditure)<sup>7</sup>

International overnight visitors spent \$10.5 billion in NSW - up by 3.9% on YE Jun 17. On average, visitors spent \$111 per night in NSW - up by 1.8% on YE Jun 17.

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

### Preliminary IVS results

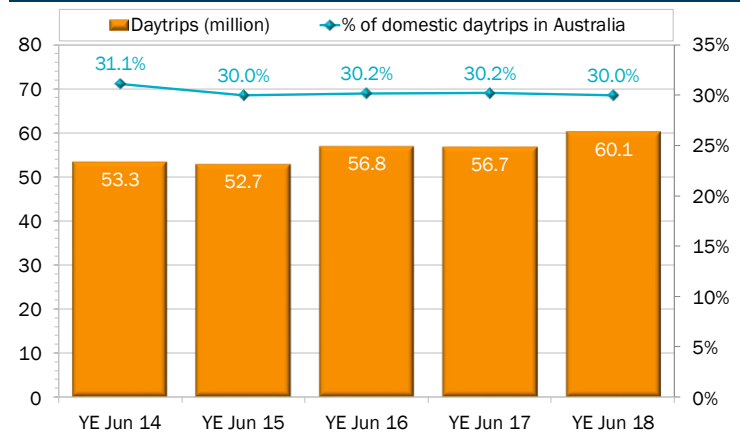
Due to quality issues with the incoming passenger data, IVS and total travel results for the year ended June 2018 are preliminary and do not include any data relating to purpose of visit. There are no issues with the survey collection.

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

\* The percentage change is statistically significant.

## Domestic Daytrip Travel<sup>4</sup>

### Daytrips



NSW received over 60.1 million domestic daytrip visitors - up by 6.0%\* on YE Jun 17.

### Market share

NSW received 30.0% of daytrips in Australia. Compared to YE Jun 17, the share was down by 0.2% pts.

### Main purpose of trip

'Holiday' (49.4%) was the largest purpose of trip for visitors to the State, followed by 'visiting friends and relatives (VFR)' (28.4%) and 'business' (9.6%). Compared to YE Jun 17, visitors who travelled for 'holiday' grew by 11.0%\* and 'VFR' increased by 3.8% while 'business' grew by 0.9%.

### Age groups

'15 to 29 years' (21.3%) was the largest age group of visitors to the State, followed by '60 to 69 years' (17.4%) and '50 to 59 years' (16.8%).

### Top activities in NSW

'Eat out, dine at a restaurant or cafe' (51.1%) was the most popular activity undertaken by visitors to NSW, followed by 'visit friends and relatives' (32.9%).

### Expenditure<sup>6</sup>

Domestic daytrip visitors spent \$6.4 billion in NSW - up by 8.6%\* on YE Jun 17. On average, they spent \$107 per trip to the State - up by 2.4% on YE Jun 17.

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

### Forecast<sup>8</sup>

**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](http://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.