

International Travel to NSW - preliminary

Year ended September 2018

For the period of October 2017 to September 2018

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



Overview

NSW received over 4.3 million international overnight visitors - up by 3.4%* on YE Sep 17. Visitors spent over 95.5 million nights in the State - up by 0.6% on YE Sep 17.

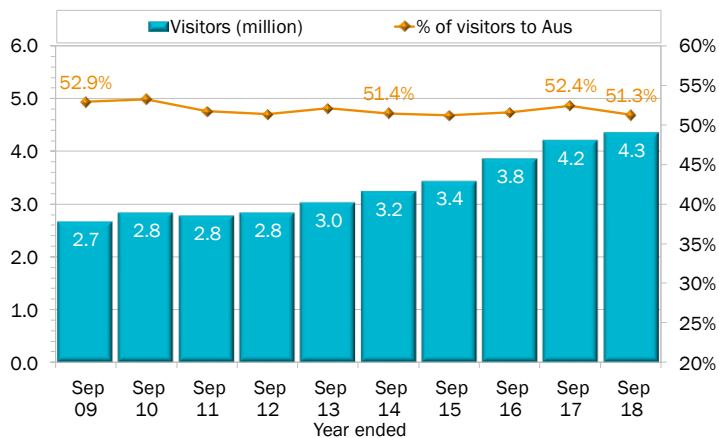
NSW received 51.3% of visitors and 35.3% of nights in Australia. Compared to YE Sep 17, the share of visitors was down by 1.1% pts and the share of nights was down by 0.2% pts.

The average length of stay in NSW was 22.1 nights - down by 0.6 nights on YE Sep 17.

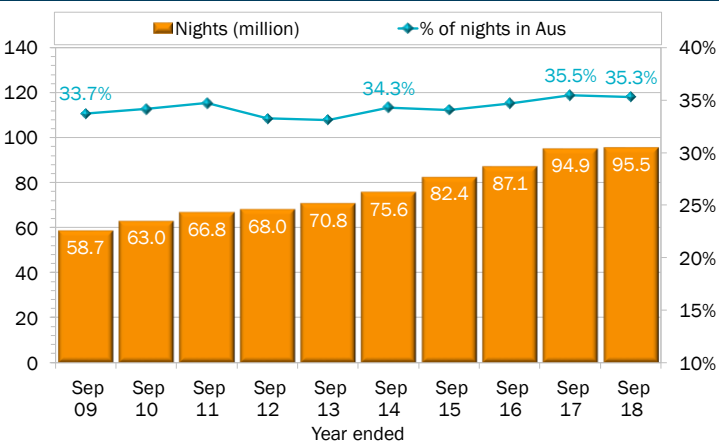
International overnight visitors spent \$10.6 billion in NSW (incl package expenditure) - up by 2.1% on YE Sep 17. This represented 35.7% of total expenditure in Australia. On average, visitors spent \$2,458 per visitor and \$111 per night in NSW. ⁽¹⁾

(1) Source: TRA's expenditure allocation method applied to IVS data, YE Sep 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 Sep 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	776	17.9%	20,242	3,498	173	26.1
2	USA	486	11.2%	4,663	725	155	9.6
3	New Zealand	439	10.1%	3,571	467	131	8.1
4	United Kingdom	374	8.6%	7,004	639	91	18.7
5	South Korea	219	5.1%	5,422	614	113	24.7
6	Japan	180	4.2%	3,730	393	105	20.8
7	India	164	3.8%	6,478	364	56	39.6
8	Germany	131	3.0%	2,753	213	77	21.1
9	Hong Kong	130	3.0%	2,374	336	142	18.2
10	Singapore	121	2.8%	1,433	254	177	11.8
11	Canada	103	2.4%	1,545	146	95	15.0
12	Taiwan	96	2.2%	2,629	237	90	27.3
13	Malaysia	89	2.1%	1,664	177	106	18.6
14	Indonesia	85	2.0%	2,228	207	93	26.2
15	France	80	1.9%	2,452	206	84	30.5
16	Philippines	69	1.6%	1,986	123	62	28.8
17	Thailand	46	1.1%	1,846	151	82	40.3
18	Italy	45	1.0%	1,623	120	74	36.4
19	Switzerland	35	0.8%	518	62	119	14.6
20	Netherlands	35	0.8%	644	61	94	18.3
21	Ireland	30	0.7%	748	67	90	24.6
	Other Asia	120	2.8%	5,408	461	85	45.0
	Scandinavia	73	1.7%	1,289	130	101	17.6
	Other Europe	117	2.7%	3,383	292	86	29.0
	Other Countries	287	6.6%	9,906	706	71	34.5
	Total NSW	4,332		95,539	10,648	111	22.1

Mainland China (776,200 or 17.9%) was the largest source market of international visitors to NSW, followed by the USA (486,000 or 11.2%) and New Zealand (439,400 or 10.1%). Compared to YE Sep 17, visitors from Mainland China grew by 2.4% and US visitors increased by 4.3% while New Zealand visitors declined by 0.9%.

Mainland China (20.2 million or 21.2%) was the biggest contributor of international visitor nights in the State, followed by the United Kingdom (7.0 million or 7.3%) and India (6.5 million or 6.8%). Compared to YE Sep 17, visitor nights from Mainland China declined by 2.9% and visitor nights from the United Kingdom decreased by 17.5%* while visitor nights from India grew by 9.8%.

Visitors from Mainland China spent the most in the State (\$3.5 billion), followed by US visitors (\$725 million) and visitors from the United Kingdom (\$639 million). Compared to YE Sep 17, expenditure by Mainland Chinese visitors grew by 8.6%* while spend by visitors from the USA declined by 10.2% and spend by UK visitors decreased by 18.7%*.

Visitors from Singapore (\$177) had the highest average spend per night in NSW, followed by Mainland Chinese visitors (\$173) and visitors from the USA (\$155).

Length of stay

International visitors stayed on average 22.1 nights in NSW, while their average stay in Australia was 32 nights. The median length of stay in the State was 5 nights compared to 10 nights in Australia. Compared to YE Sep 17, the average in NSW was down by 0.6 nights and the median stay was unchanged.

Visitors from Thailand (40.3 nights) had the longest average stay in NSW, followed by Indian visitors (39.6 nights) and visitors from Italy (36.4 nights).

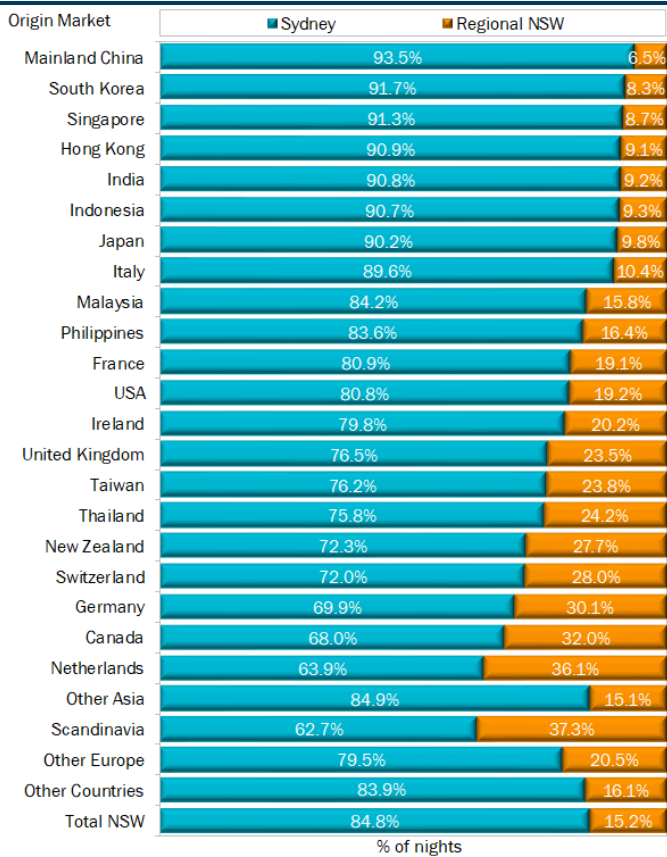
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Destinations in NSW

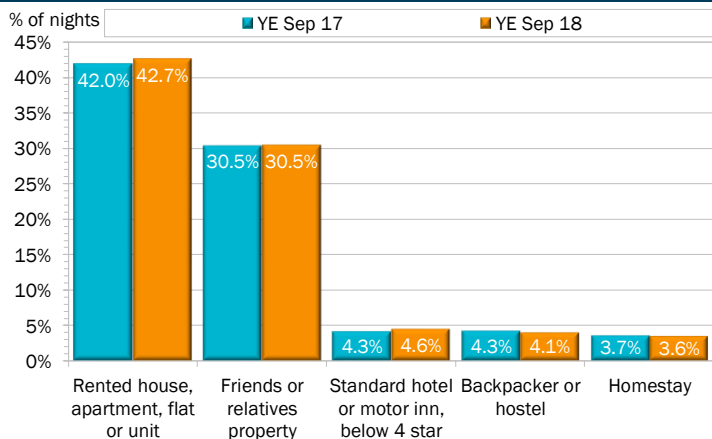


International overnight visitors spent 84.8% of their nights in Sydney – up by 0.9% pts on YE Sep 17.

Visitors from Mainland China (93.5%) had the highest proportion of nights spent in Sydney. South Korean visitors (91.7%) had the 2nd highest proportion, followed by Singaporeans (91.3%).

Visitors from Netherlands (36.1%) had the highest proportion of nights in regional NSW. Canadian visitors (32.0%) had the 2nd highest proportion, followed by Germans (30.1%).

Accommodation in NSW



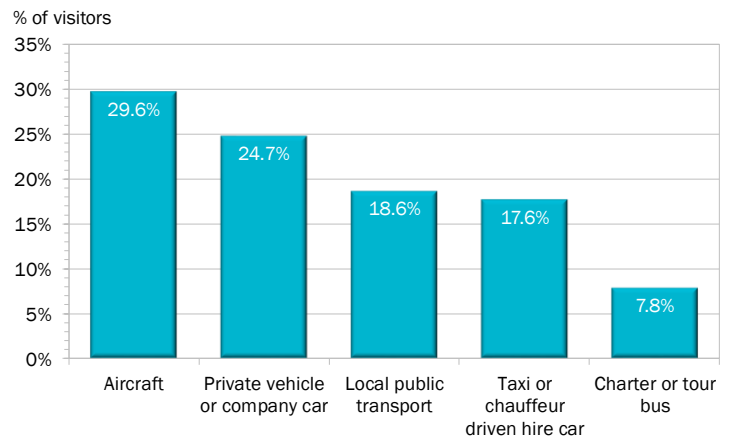
'Rented house, apartment, flat or unit' (42.7%) was the most popular accommodation type used for nights in NSW by international visitors, followed by 'friends or relatives property' (30.5%) and 'standard hotel or motor inn, below 4 star' (4.6%).

Compared to YE Sep 17, 'rented house, apartment, flat or unit' grew by 0.7% pts while 'backpacker or hostel' fell by 0.2% pts.

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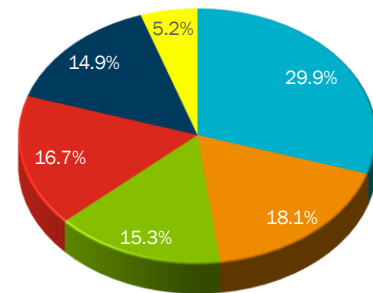
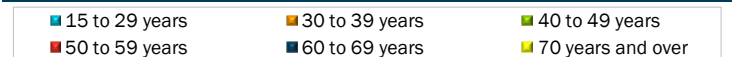
* The percentage change is statistically significant.

Transport in NSW



'Aircraft' (29.6%) 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 'local public transport' (18.6%) and 'taxi or chauffeur driven hire car' (17.6%).

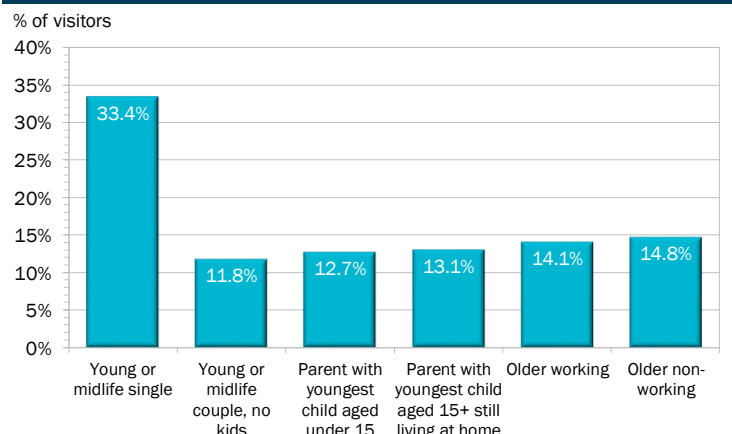
Age groups



Visitors

'15 to 29 years' (29.9%) was the biggest age group amongst international overnight visitors to NSW. '30 to 39 years' (18.1%) was the 2nd biggest age group, followed by '50 to 59 years' (16.7%).

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' (14.8%) was the 2nd most common lifecycle grouping, followed by 'older working' (14.1%).

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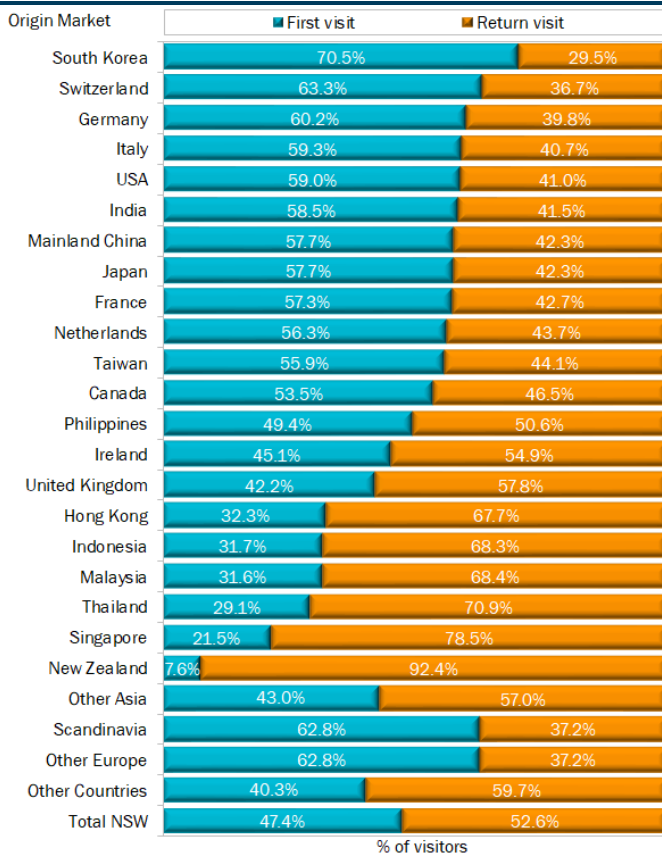
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	YE Sep 18	YE Sep 17	YE on YE growth
Preliminary			
Visitors to NSW (million)	4.3	4.2	3.4%
Nights in NSW (million)	95.5	94.9	0.6%
Expenditure in NSW (billion)	\$10.6	\$10.4	2.1%
Expenditure per night in NSW	\$111	\$110	1.5%

First or return visitor



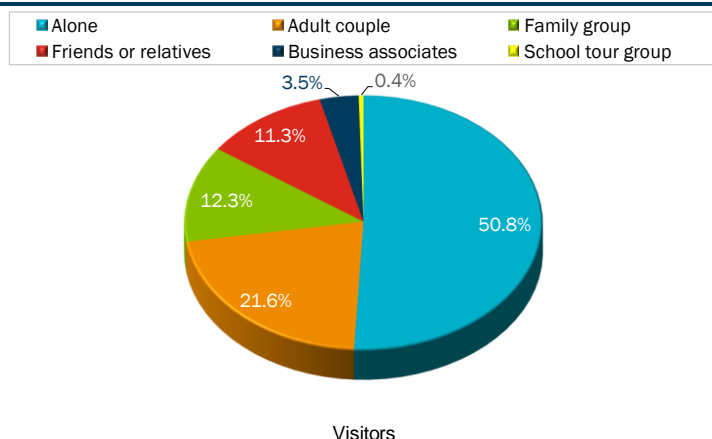
Most international overnight visitors who had been to NSW (52.6%), were on a return trip to Australia – up by 1.4% pts on YE Sep 17.

International overnight visitors who had been to the State:

South Korean visitors (70.5%) had the highest percentage of first time travellers to Australia. Visitors from Switzerland (63.3%) had the 2nd highest proportion, followed by German visitors (60.2%).

New Zealand visitors (92.4%) had the highest proportion of repeat travellers. Visitors from Singapore (78.5%) had the 2nd highest proportion, followed by Thai visitors (70.9%).

Travel party

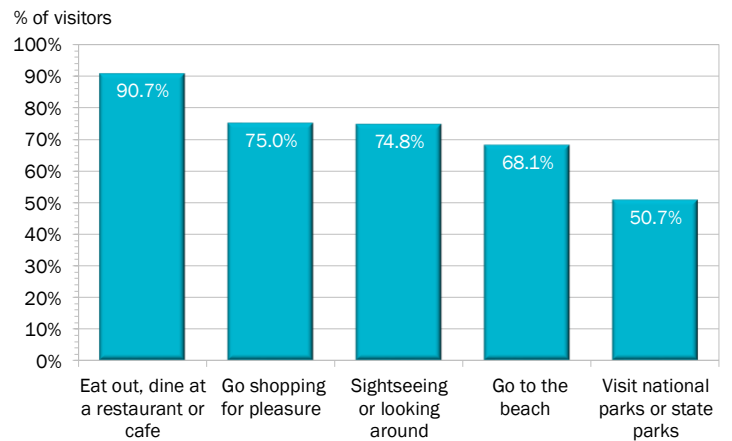


Over ½ (50.8%) of international overnight visitors who had been to NSW arrived in Australia ‘alone’. Their 2nd most common travel party description was ‘adult couple’ (21.6%), followed by ‘family group’ (12.3%).

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Top activities in Australia



‘Eat out, dine at a restaurant or cafe’ (90.7%) was the most popular activity undertaken during the trip to Australia by international overnight visitors who had been to NSW. ‘Go shopping for pleasure’ (75.0%) was the 2nd most popular activity, followed by ‘sightseeing or looking around’ (74.8%).

Travel package

Nearly 1/5 (16.9%) of international overnight visitors who had been to NSW, arrived in Australia on a travel package.

‘All accommodation’ (86.4%) was the most popular travel arrangement included in the package (other than ‘international airfares’). ‘Most ground transport within Australia’ (70.4%) was the 2nd most popular arrangement included, followed by ‘airfares within Australia’ (67.6%).

Group tour

Over 1/10 (11.0%) of international overnight visitors who had been to NSW, arrived in Australia as part of a group tour.

‘Guided holiday’ (88.6%) was the most common group tour. ‘Business or convention’ (5.5%) was the 2nd most common group tour, followed by ‘school excursion’ (3.2%).

Overview - Australia

Australia received over 8.4 million international visitors who spent nearly 270.6 million nights in Australia – up by 5.7%* and by 1.1% respectively on YE Sep 17. On average, they stayed for 32 nights - down by 1.5 nights on YE Sep 17.

Visitors spent over \$29.8 billion (incl package expenditure) while in Australia - up by 5.2%* on YE Sep 17. On average, they spent \$3,531 per visitor and \$110 per night in Australia. ⁽⁴⁾

Preliminary results

Due to quality issues with the incoming passenger data, IVS results for the YE Sep 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.